

World Pressure Sensitive Tapes

Industry Study with Forecasts for 2020 & 2025

Study #3447 | October 2016 | \$6300



Advances in the global market for pressure sensitive tapes will generally be the strongest in the developing markets worldwide. The Asia/Pacific region, which is already the largest regional market, will continue to register above average gains. China will remain the largest market by a wide margin and will continue to post above average increases. The Africa/Mideast region will register the most rapid growth through the forecast period, but will still account for less than five percent of global demand by 2020.

International trade plays a big role

International trade of tapes is considerable. Historically, pressure sensitive tape production has been concentrated in a handful of countries, particularly the US, Italy, Taiwan, and China. China has grown to become the largest tape producer and exporter by a wide margin. The US remains a large manufacturer and exporter of specialty tapes, although it imports a significant amount of commodity tapes, mainly from China and Taiwan. Italy supplies much of the European market, although Italian producers face greater competition from Chinese suppliers, even in their domestic market. Taiwan still manufactures tape at a level far in excess of its domestic requirements, although some leading Taiwanese producers have shifted output capacity to China, both to save on manufacturing costs and to be nearer to customers.

North America, Western Europe & Japan markets face maturity

The more mature markets of North America, Western Europe, and Japan will continue to account for a substantial share of worldwide demand for pressure sensitive tape -- more than one-third of the total in 2020. In the US, modest gains in manufacturing output will support sales of carton sealing tapes. In Western Europe, rebounding construction activity following a long period of decline will heighten the usage of masking and other tapes. Japan's economic growth will remain slow, but the country will remain a significant producer and consumer of specialty tapes, such as those used in motor vehicle and electronics assembly.

Study coverage

This study examines the global pressure sensitive tape market. It presents historical data (2005, 2010 and 2015) plus forecasts (2020 and 2025) for supply and demand, as well as demand by tape type (carton sealing, masking, electrical and electronic, double sided, medical, other) and by tape backing material (polypropylene, paper, polyvinyl chloride, other) for six regions and 20 countries. The study also considers key market environment factors, assesses the industry structure, evaluates company market share and profiles global competitors.

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Industry Study with historical data for 2005,
2010 & 2015 plus forecasts for 2020 & 2025

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**GERMANY: PRESSURE SENSITIVE TAPE SUPPLY & DEMAND
(million square meters)**

Item	2005	2010	2015	2020	2025
Population (mil persons)					
\$ GDP/capita					
Gross Domestic Product (bil 2014\$)					
% manufacturing					
Manufacturing Value Added (bil 2014\$)					
m ² /capita					
m ² /mil \$ GDP					
m ² /000\$ MVA					
Pressure Sensitive Tape Demand + net exports					
Pressure Sensitive Tape Production					
% Germany					
W Europe Pressure Sensitive Tape Prdn					

Source: The Freedonia Group

ASIA/PACIFIC

Taiwan: Supply & Demand -- Demand for pressure sensitive tapes in Taiwan totaled 550 million square meters in 2015, accounting for about three percent of the regional total. Taiwan boasts a highly developed economy, and among the highest per capita income levels in the region. In particular, its developed manufacturing sectors (e.g. beverage, chemicals, durable goods), which participate in both local and export markets, will continue to support demand for pressure sensitive tapes. However, the Taiwanese tape market is already quite mature (especially by regional norms), and the island's dependence on imported packaging-intensive consumer goods will limit potential growth to a certain extent. However, the country is much more important to the global industry as a producer than it is as a market, and will remain one of the world's largest producers of PSA tapes.

Taiwan is one of the world's largest net exporters of pressure sensitive tapes. It was once much more dominant, prior to the emergence of China as a global leader in tape production and exports. Some Taiwanese firms have contributed to this phenomenon by shifting production to China. Leading destinations for Taiwanese exports include Japan, Mexico, the Philippines, and the United States. China is the leading source of imports, which do not account for a large share of the domestic market in Taiwan. Japan and Vietnam are also suppliers to Taiwan.

... is projected to increase by ... square meters. The emergence of China has reduced export market competition although some have stayed competition facilities in China.

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**POLAND:
PRESSURE SENSITIVE TAPE DEMAND BY TYPE & MATERIAL
(million square meters)**

Item	2005	2010	2015	2020	2025
Eastern Europe Pressure Sensitive Tapes % Poland					
Pressure Sensitive Tape Demand By Type:					
Carton Sealing					
Masking					
Double-Sided					
Other					
By Material:					
Polypropylene					
Paper					
PVC					
Other					

Source: The Freedonia Group

This study can help you:

- Determine your market & sales potential
- Learn more about industry competitors
- Assess new products & technologies
- Identify firms to merge with or acquire
- Complement your research & planning
- Gather data for presentations
- Confirm your own internal data
- Make better business decisions

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Related Studies

Retail Ready Packaging

Retail ready packaging (RRP) is forecast to grow 5.2 percent annually to \$6.2 billion in 2020. Further growth for mass retailers and club stores will support gains, since such stores primarily sell merchandise directly from secondary packaging, which requires their vendors to ship RRP products. Corrugated boxes will provide the best opportunities for growth. The study presents historical demand data plus forecasts for 2020 and 2025 by product and market. This study also analyzes industry structure, evaluates company market share and profiles US industry competitors. #3433..... July 2016 \$4900

Corrugated & Paperboard Boxes

US demand for corrugated and paperboard boxes is forecast to increase 2.6 percent annually to \$41.2 billion in 2020. E-commerce and retail-ready applications will drive growth for corrugated boxes while folding carton demand will be sustained by the food-service and carryout and pharmaceutical markets. This study analyzes US demand for corrugated and paperboard boxes. It presents historical data (2005, 2010 and 2015) and forecasts (2020 and 2025) by material and market. The study also evaluates company market share and profiles industry players. #3398..... April 2016 \$5500

Pressure Sensitive Tapes

US demand for pressure sensitive tapes is projected to increase 5.3 percent annually to \$9.3 billion in 2019. Double-sided, masking and adhesive transfer tapes will be the fastest growing major products. The building and construction market will enjoy the most rapid increases. This study analyzes the \$7.2 billion US pressure sensitive tape industry, with forecasts for 2019 and 2024 by material, product and market. The study also considers market environment factors, details raw material usage, and profiles industry competitors. #3361..... December 2015 \$5300

Labels

US label demand will rise 3.8 percent annually to \$19.7 billion in 2019. In-mold, stretch sleeve and heat-shrink labels will grow the fastest. Digital printing will continue to displace traditional label printing methods. Primary packaging will remain the largest function, while secondary labeling and mailing/shipping labels will pace gains. This study analyzes the \$16.3 billion US label industry, with forecasts for 2019 and 2024 by material, application method, printing technology, and function. The study also evaluates company market share and profiles industry players. #3291..... June 2015 \$5500

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Freedonia's methods

- Establishing consistent economic & market forecasts
- Using input/output ratios, flow charts & other economic methods to quantify data
- Employing in-house analysts who meet stringent quality standards
- Interviewing key industry participants, experts & end users
- Researching a proprietary database that includes trade publications, government reports & corporate literature

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