



**PSTC**  
PRESSURE SENSITIVE TAPE COUNCIL

## North America



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## What is the PSTC ?

- Mission
- Members
- Strategic Platform & Goals

## Market Survey for Growth

- Background
- Scope & Goal
- Learnings
- Next steps

To be recognized as the **influential** North American trade association of

Pressure sensitive adhesive tape **manufacturers** and (their) suppliers.

Goal is to increase the global **usage** of PSA tape products.

Members comply with the highest **standards** for manufacturing quality products with environmentally and socially responsible methods and practices.

# Member Companies



# Affiliate Supplier Members







**Then:**

- 1. "Generic" market studies**
- 2. Members only marketing**

**Now:**

- 1. Outbound marketing**
- 2. Focus market studies and outreach**

# GROWING THE PIE

**REPLACE / ALTERNATIVE**  
other bonding methods

**GROW** market for members

**PROMOTE** awareness of  
PSTC



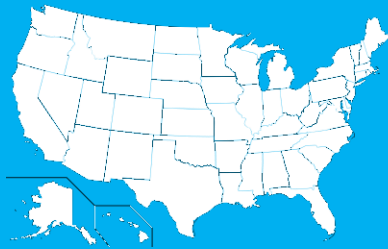


**Identify top opportunity areas for "growing the pie" for pressure-sensitive tape.**

## MARKET RESEARCH

- 1| **UNDERSTAND** the decision drivers that are influencing current specification and usage of different bonding solutions
- 2| **ASSESS** the key barriers to converting usage of other bonding solutions to PSA Tape
- 3| **IDENTIFY** the industries and applications that are most likely to convert

1,000  
Respondents



RESPONDENT QUALIFICATIONS



**Aerospace, Marine, or  
Railway**



**Automotive**



**Appliances**



**Construction / Building**



**Electronics**



**Medical**



**Other Manufacturing,  
Fabrication, or  
Component Assembly**

# KEY STRENGTHS



**Lightweight**



**Easy to use**



**Reputable brands**



**Superior stress distribution**



**Low cost**



**Fast application**



**Aesthetically pleasing**

# CHALLENGES



**Uncertainty about bond permanency**



**Perceived weaker bonds**



**Unsure if it can withstand extreme temps**



**Unsure if bond can withstand moisture**



**Not sure end user would feel confident using product**



**Potential damage to surface to be bonded**

# PERVASIVE CHALLENGES



**Uncertainty about bond permanency**



**Perceived weaker bonds**



**Unsure if can withstand extreme temps**

# HIGHEST OPPORTUNITY INDUSTRIES



## CONSTRUCTION

Significant opportunity to increase usage of PSA Tape

Large market, relatively low penetration for PSA Tape

Moderate-to-high potential for conversion



## APPLIANCES

PSA is most effective bonding solution

Still offers significant conversion potential



## AUTOMOTIVE

Moderate-to-high conversion potential

Relatively strong current foothold in the industry



## MEDICAL

Conversion from liquid adhesives specifically

# OVERALL FINDINGS for PSA TAPES

## CURRENT USAGE FOR BONDING

**PSA Tapes are currently specified in ~27% of projects that require bonding solutions**

< than mechanical fasteners and liquid adhesives, > than RF welding and hook & loop

## CONVERSION POTENTIAL

**~19% to 29% potential conversion possible** from competing bonding solutions

## MAIN BARRIER TO USAGE

**Less likely to be thought of as creating bonds that are permanent or durable** = top decision driver in bonding solution selection

## REDUCING KEY BARRIERS

**Create product testing/user proof points and end user education/training** around bond permanency, durability, and ability to withstand environmental stressors

# FOCUS ON BUILDING & CONSTRUCTION

Large opportunity

Plenty of applications

Create an outreach program



## POTENTIAL CONVERSION FROM:



# DEDICATED PR PLAN

Editors Events

Published byline 7 articles

Engaging thought leaders

Create and build presence





# BUILDING TOWARDS A GOAL



**IBS**™ 2018 NAHB INTERNATIONAL BUILDERS' SHOW®



**PSTC Booth at the largest construction show in the world**

**60,000 visitors** from 100 countries

1,500 exhibitors



Promoting the interests of the European adhesive tape industry

# **BOLSTER OUR AUTHORITY**



**Outreach and Thought Leadership**

**Be the recognized authority on PSA tape**

**Expand segments / market**

**Expand audience for our events**

