



China Tape Market Demand and Application Trend

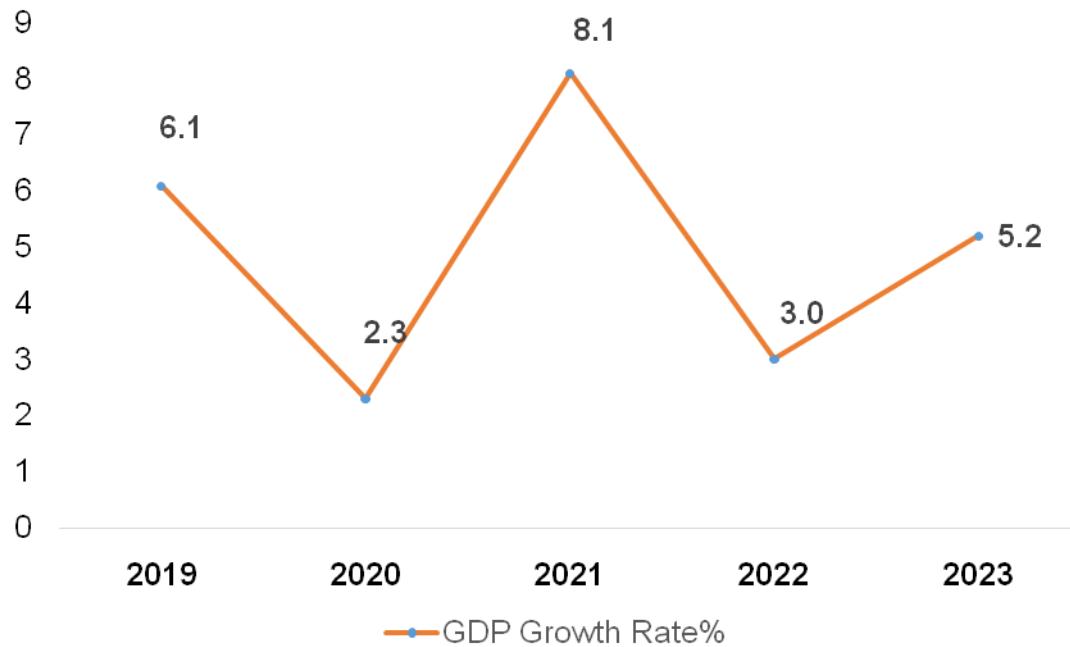
Michael Yang, Secretary General

China Adhesives and Tape Industry Association (CATIA)

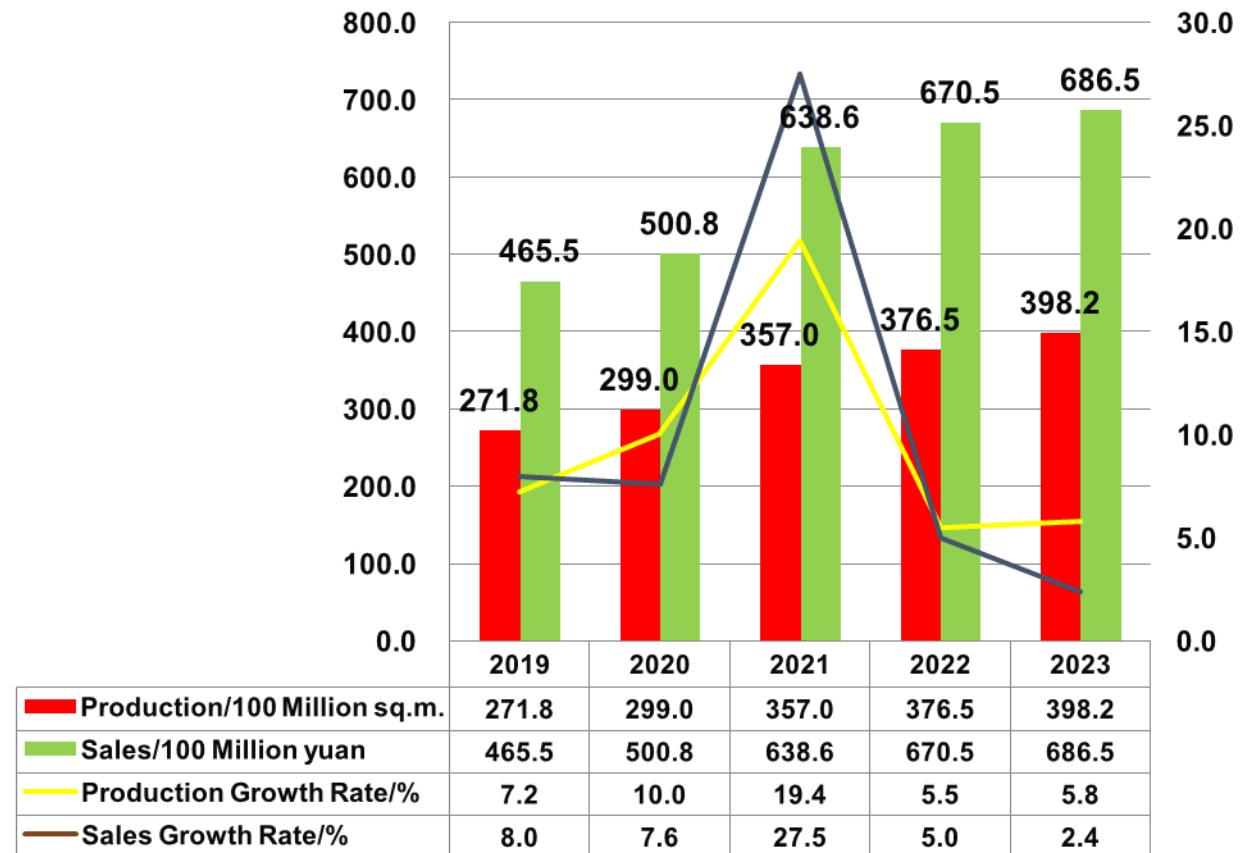
April 24, 2024

1. Market Situation of China's Tape Industry

Comparison of National GDP Growth Rate and China's Tape Industry Production Growth Rate from 2019 to 2023



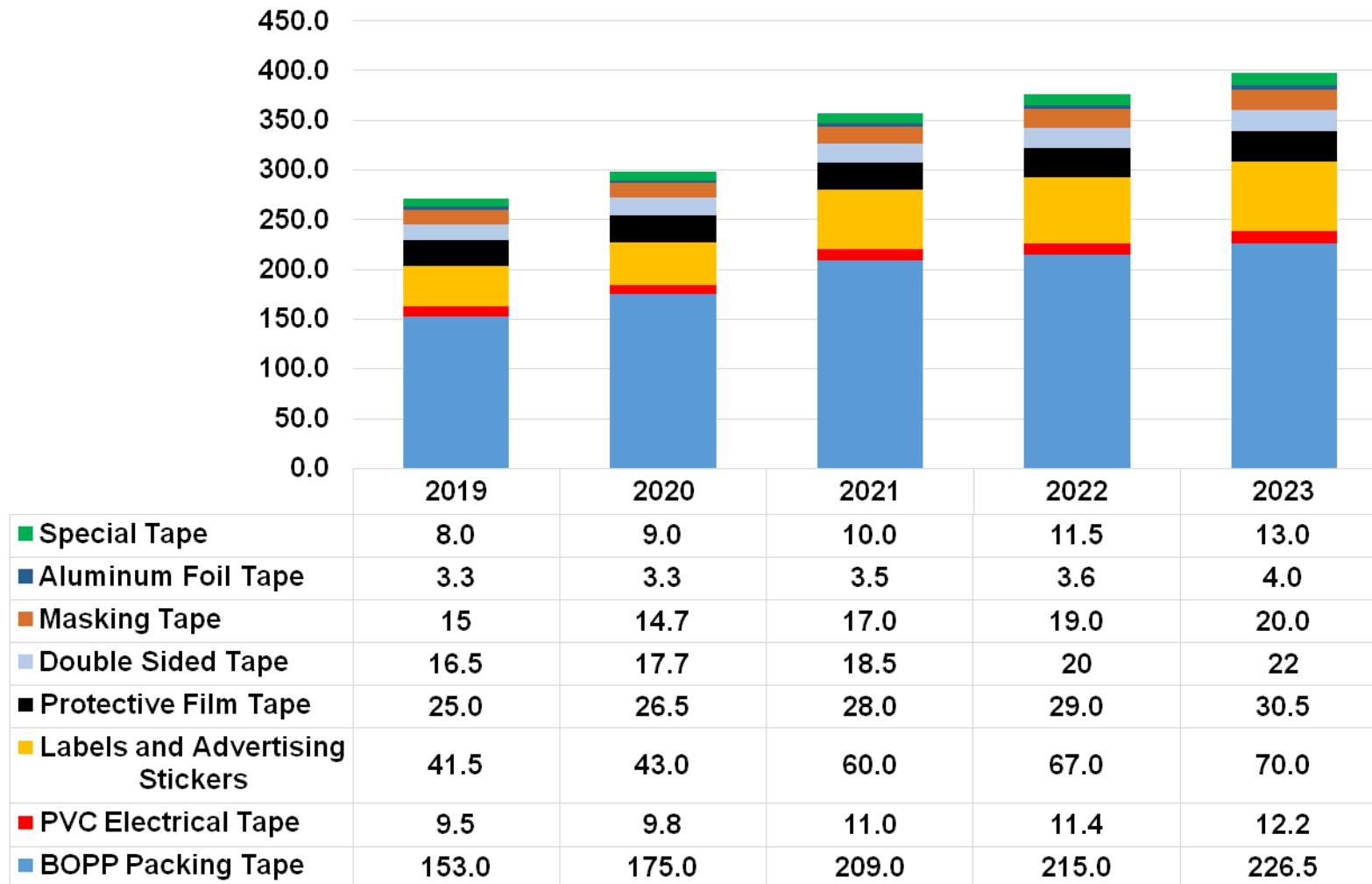
2019-2023 GDP Growth Rate/%



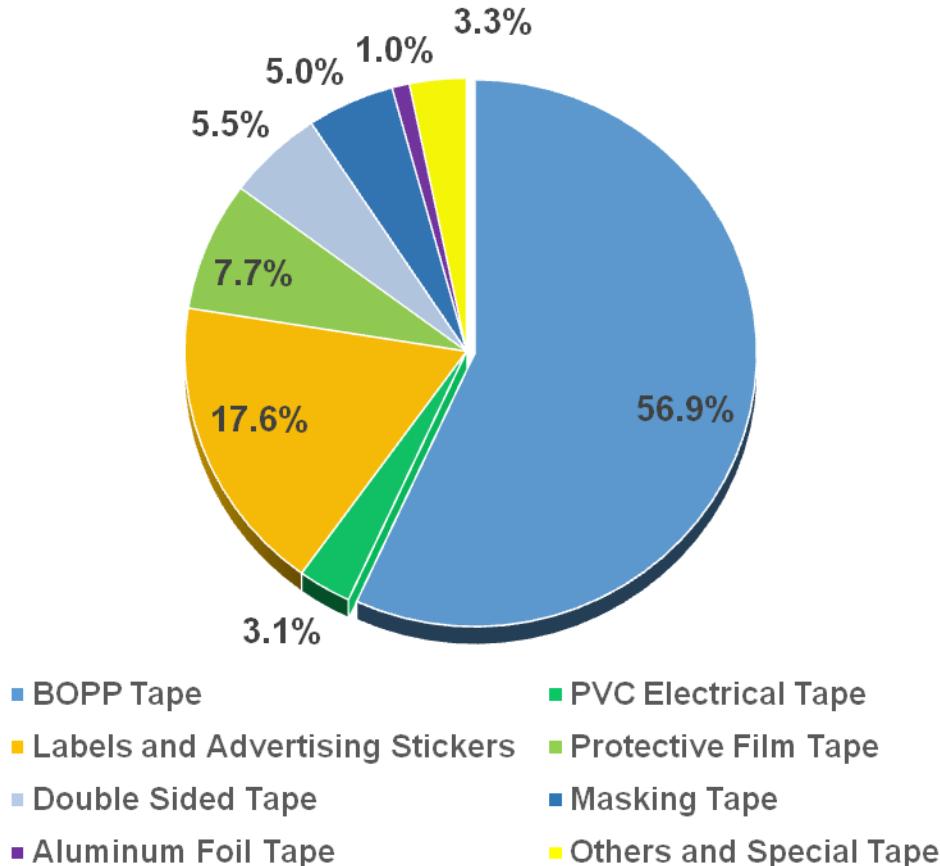
2019-2023 Tape Production and Sales Change

Changes in Tape Industry Segments in China during 2019-2023

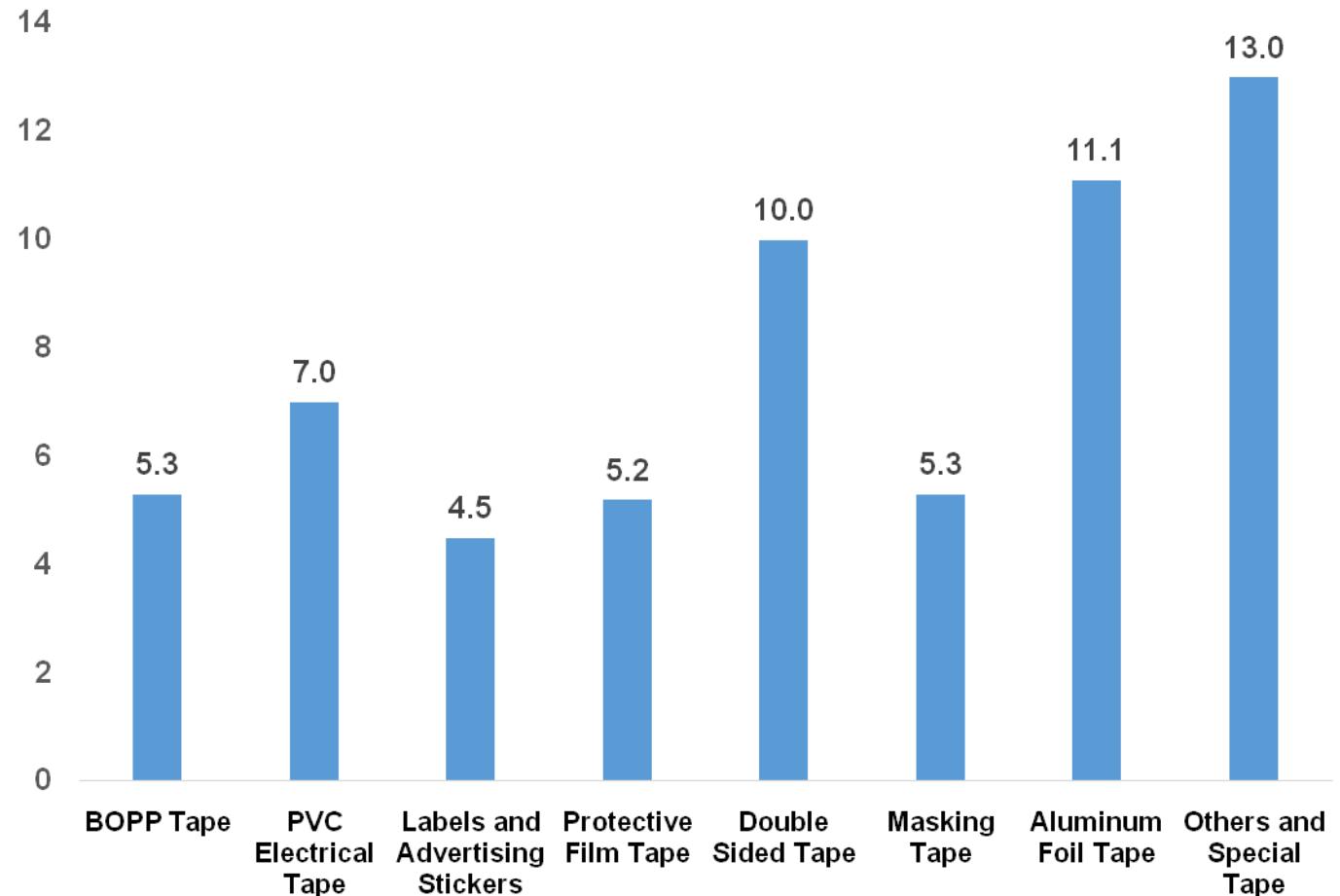
Changes in Production of Various Types of Adhesive Tape in China from 2019 to 2023/100 million sq.m.



Production and Growth Rate of Various Types of Adhesive Tape in China in 2023



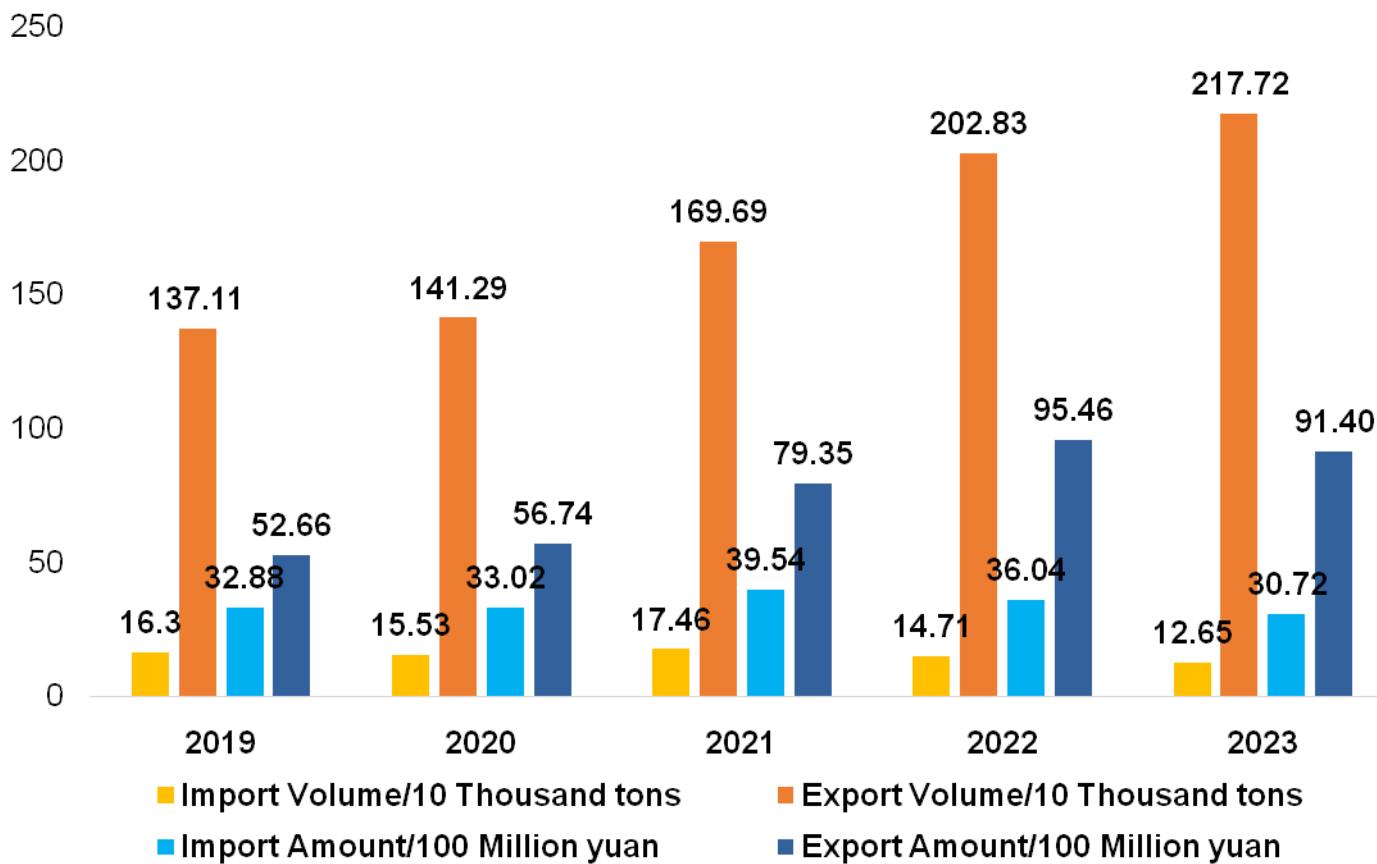
Types and Production Proportion of Tape/%



Production Growth Rate of Each Type of Tape/%

Import and Export Situation of Tape in China from 2019 to 2023

Import and Export Situation of Tape in China from 2019 to 2023



2. Six Development Features of China's Tape Industry in 2023

1. The concentration of bulk products has increased significantly, new breakthroughs have made in the fields of medium to high-end application.

In recent years, the transformation and upgrading of China's tape industry had accelerated, with a significant increase in the concentration of bulk products and a strong market competitive advantage. A group of innovative small and medium-sized enterprises (such as **Shanghai Petran**, **Guangdong Hongqing**, **Suzhou Hi-Tech**, **Shenzhen Meixin**, **Innova**, **Wuhu Huishi**, etc.) continue to make efforts to accelerate breakthroughs in medium to high-end application fields.

2. Well-developed industrial and supply chain advantages promote outstanding export performance of tape products.

Benefit by China's well-developed industrial system, complete upstream and downstream support and the competitiveness of the whole industry chain, China's tape products are featured with cost advantages, reliable quality and stable supply, therefore its exports continue to grow rapidly. Mainly exported to the neighboring countries and regions in Asia, such as **Vietnam, India, Indonesia, Philippines, Thailand, South Korea, Pakistan**.

3. High-quality development results are apparent, and new quality productive forces have ignited new engines.

According to the CATIA's statistics, in 2023, China's adhesive and tape industry issued nearly 2,400 patents, of which pressure-sensitive adhesive and tape patents accounted for about 30%. Guided by the mechanism of encouraging innovation in the country, a group of **national-level specialized and sophisticated “little giant” and manufacturing individual champion** had emerged in the industry, committed to tackling technological innovation in specific fields, and the high-quality development effect of the industry has been demonstrated. The continuous enhancement of technological innovation capabilities brings new technologies, applications, and opportunities to the adhesive tape industry, and builds a core driving force for the development of new quality productivity.

4. The development of “new three types” is accelerating, which brings about dual-growth of electrical tape and double-sided tape.

In the past, “old three types” of clothing, furniture, household appliances were exported in large quantities and became popular overseas. Nowadays, “new three types” of **new energy vehicles, lithium batteries, photovoltaic products** are setting sail and making a global impact. The “new three types” stand out with new technologies and products, gain new competitive advantages, and drive the dual growth of production and sales for electrical tape and double-sided tape.

5. The volume of express delivery business continues to rise, and BOPP tape continues to develop rapidly.

With the continuous improvement of people's living standards in China, the rapid development of online e-commerce industry, and the continuous expansion of logistics and distribution service coverage, the domestic express delivery industry is showing a vigorous development trend. According to statistics from the National Postal Administration, the cumulative volume of express delivery business (excluding postal group's parcel business) in 2023 was **132.07 billion pieces, a year-on-year increase of 19.4%**. The traditional product BOPP tape, as the main sealing product for express packaging, has been driven by the continuous growth of domestic express delivery business, resulting in a continuous increase in market demand and a continuous increase in scale.

6. The direction of green and low-carbon transformation is clarified, and technical support for high-quality development is strengthened.

In recent years, with the joint promotion of the country and industry, some green and low-carbon industrial policies, environmental regulations, and standards have been successively introduced, promoting the transformation and upgrading of the industry. Adhesive tape enterprises are gradually clarifying the direction of green and low-carbon transformation, actively seeking new growth opportunities nurtured in transformation and upgrading. The innovative source of pressure-sensitive adhesives and substrates, such as **reactive, low VOC content, and bio-based materials**, has become the technical support for the high-quality development of the industry.

3. Market Opportunities and Trend of Tape Industry

- At present, China has become the world's largest producer and consumer of adhesive tapes. With the progress and development of technology, the industry is constantly innovating and upgrading. In the future, efficient, environmentally friendly, and high-performance adhesive tape products will inevitably become the focus of market development.
- With the continuous emergence of new materials and the continuous expansion of application fields, **transportation, medical products, consumer electronics, and industrial manufacturing** are innovative application areas for future adhesive tape products.
- With the increasing awareness of environmental protection and the requirements of sustainable development, green packaging will continue to maintain a good development momentum and become the main theme of high-quality development in the industry.

3. Market Opportunities and Trend of Tape Industry

- Environmental friendly and green adhesive tape products represented by **UV hot melt pressure-sensitive adhesive** will undoubtedly usher in greater development space.
- **Bio-based and biodegradable adhesive tape products** are expected to break through technological bottlenecks and accelerate industrialization under policy, technology, and market leadership.
- The China adhesive tape industry will enter a transformation stage of “**low-speed and high-quality development**”, and the focus of future industry growth will be in the Asia Pacific region, including in China.

Thank you

GLOBAL
TAPE
FORUM



China Adhesives and Tape Industry Association (CATIA)

Address: Room 2107, Tower B, Tianyuangang Center, No. 2 Dongsanhuan North Road, Chaoyang District, Beijing 100027, China

Tel: +86-10-8766 7165

Fax: +86-10-8766 3015

E-mail: yang@catia-china.com

<http://www.catia-china.com>