

THE PSTC & SPECIALTY ADHESIVE TAPES IN NORTH AMERICA

Presented by Michel Merkx

VP & GM of American Biltrite and
PSTC board member.



1. The PSTC: Pressure Sensitive Tape Council of North America.
2. Market insights of PSA Tapes in North America.

Pressure Sensitive Tape Council (PSTC):

- A not-for-profit North American trade association dedicated to helping the industry produce quality pressure sensitive adhesive tape products in the global marketplace.
- For 60 years, PSTC provides education and training, works closely with U.S. Government EPA with air regulations, OSHA with employment regulations, ASTM and other global trade organizations to harmonize test methods.
- PSTC is globally recognized for their tape testing methods, assuring quality control performance for PSA tapes.
- PSTC monitors legislative and regulatory activities and encourages sustainable and responsible manufacturing practices.

MISSION

The PSTC will be recognized as the influential North American trade association of world-class pressure sensitive adhesive tape manufacturers and their suppliers whose goal is to increase the global usage of PSA tape products.

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

MEMBERS

- **Manufacturer Members:**

Companies that coat and convert PSA tapes, papers, films, etc.

- **Supplier of Affiliate Members:**

Companies manufacture (raw) materials or services, used by the Manufacturer members.

Pressure Sensitive Tape Council (PSTC):



C.A.T.



Coroplast



Flexcon



Nitto



Premium Building Products
That Protect



Shurtape



Pressure Sensitive Tape Council (PSTC):

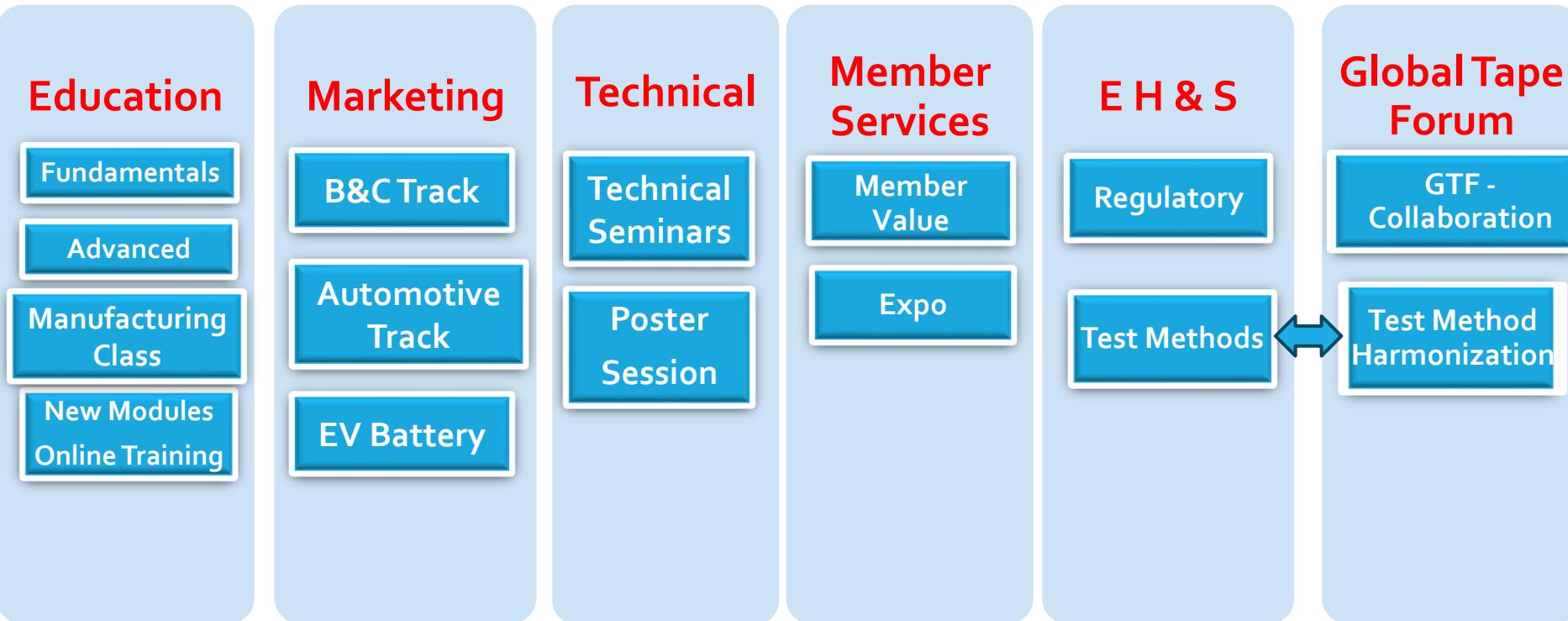


Milliken



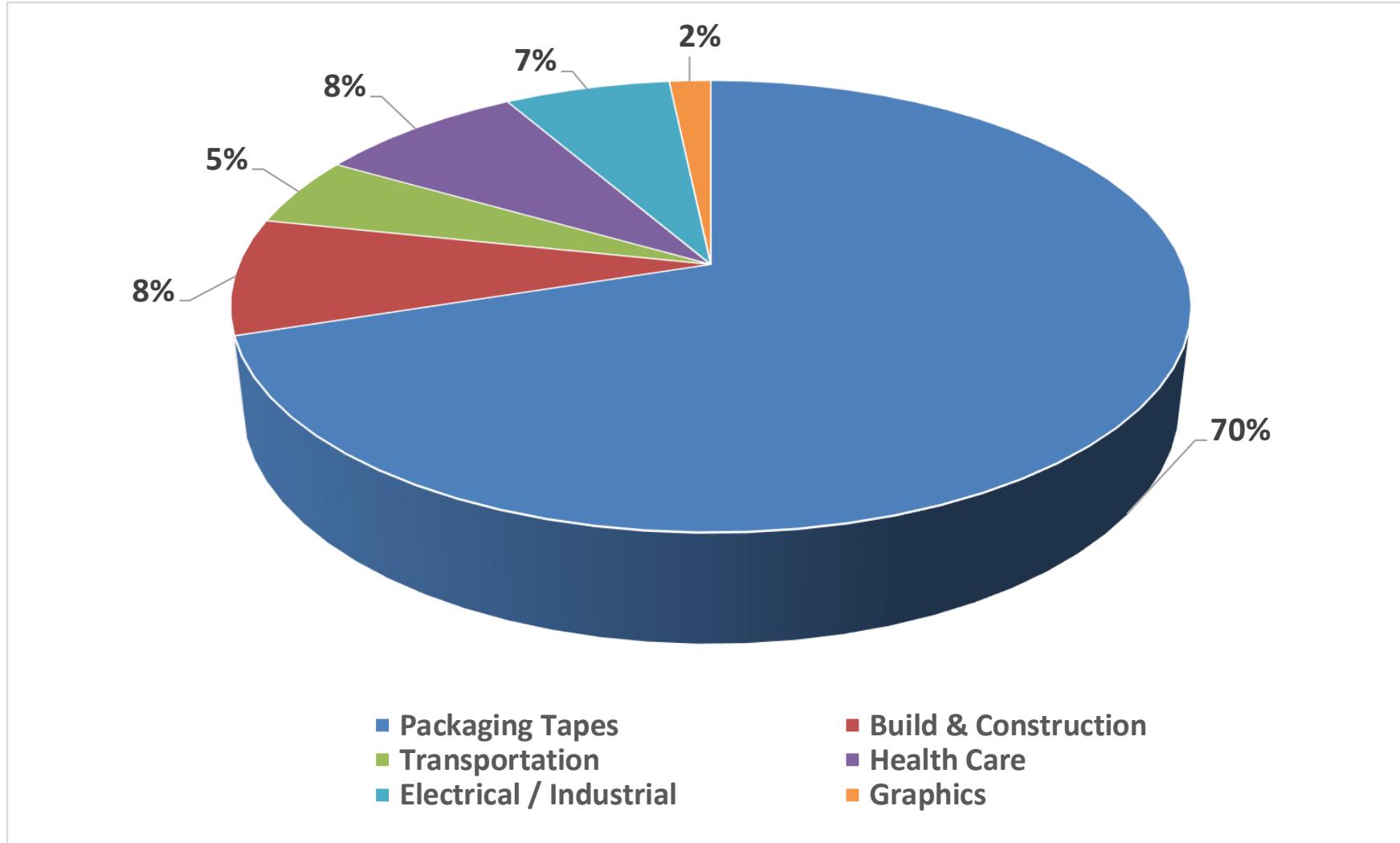
PSTC Board of Directors

PSTC Committees (6)



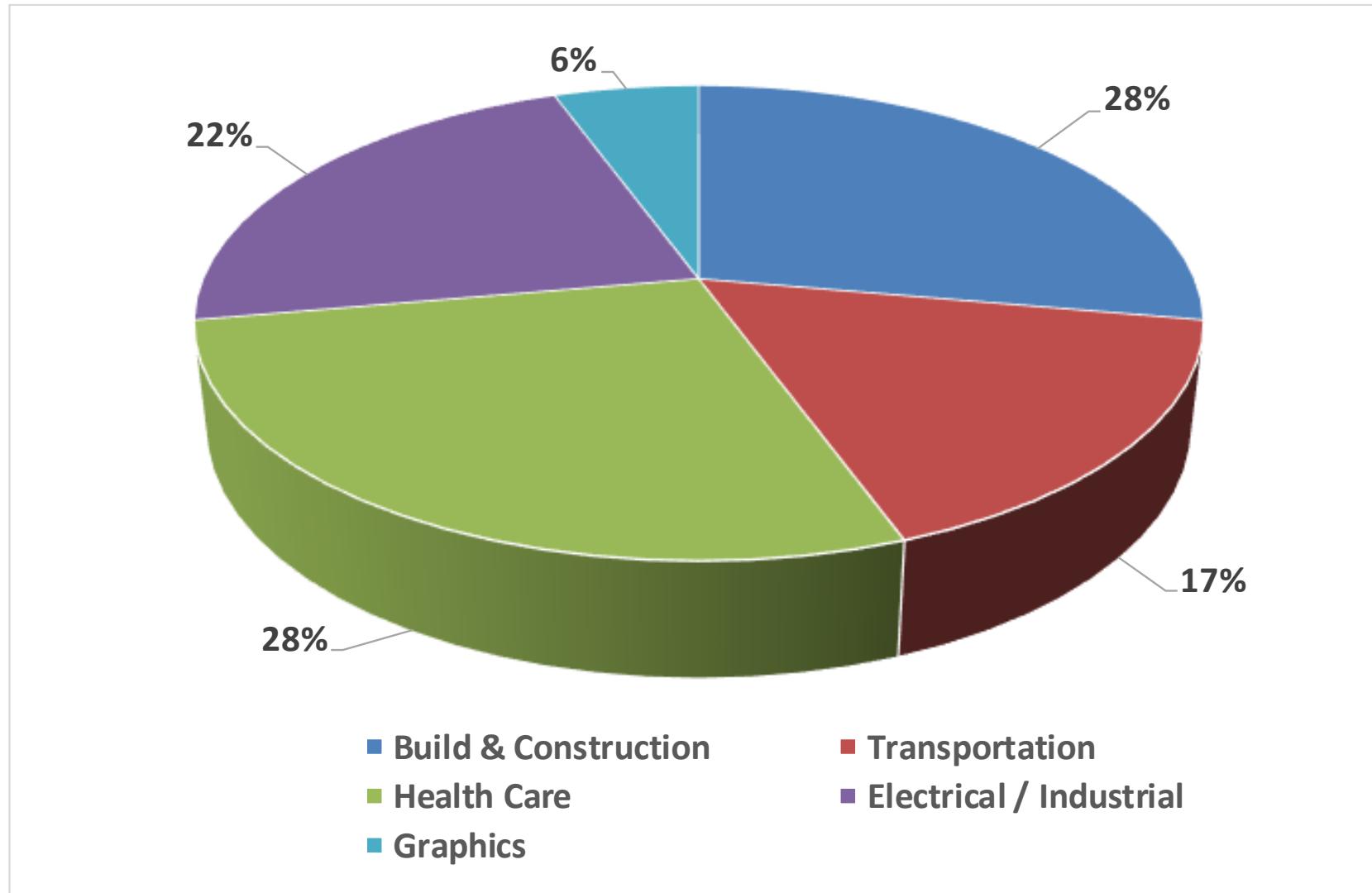
North American Tape Market: \$25.3 Billion

CAGR 2022 - 2028: 5.1%



North American *Specialty* Tape Market: \$7.6 Billion

CAGR 2022 - 2028: 5.6%



MARKET RESEARCH TO GAIN INSIGHTS HOW TO GROW PSA TAPES IN SECTORS:

- REPLACE / ALTERNATIVE** other bonding methods
- GROW** market for members
- PROMOTE** awareness of PSTC

Market Research in 7 sectors:



Aerospace, Marine, or Railway



Automotive



Appliances



Construction / Building



Electronics



Medical



Other Manufacturing, Fabrication, or Component Assembly

MARKET RESEARCH PURPOSE:

UNDERSTAND the decision drivers that are influencing current specification and usage of different bonding solutions

ASSESS the key barriers to converting usage of other bonding solutions to PSA Tape

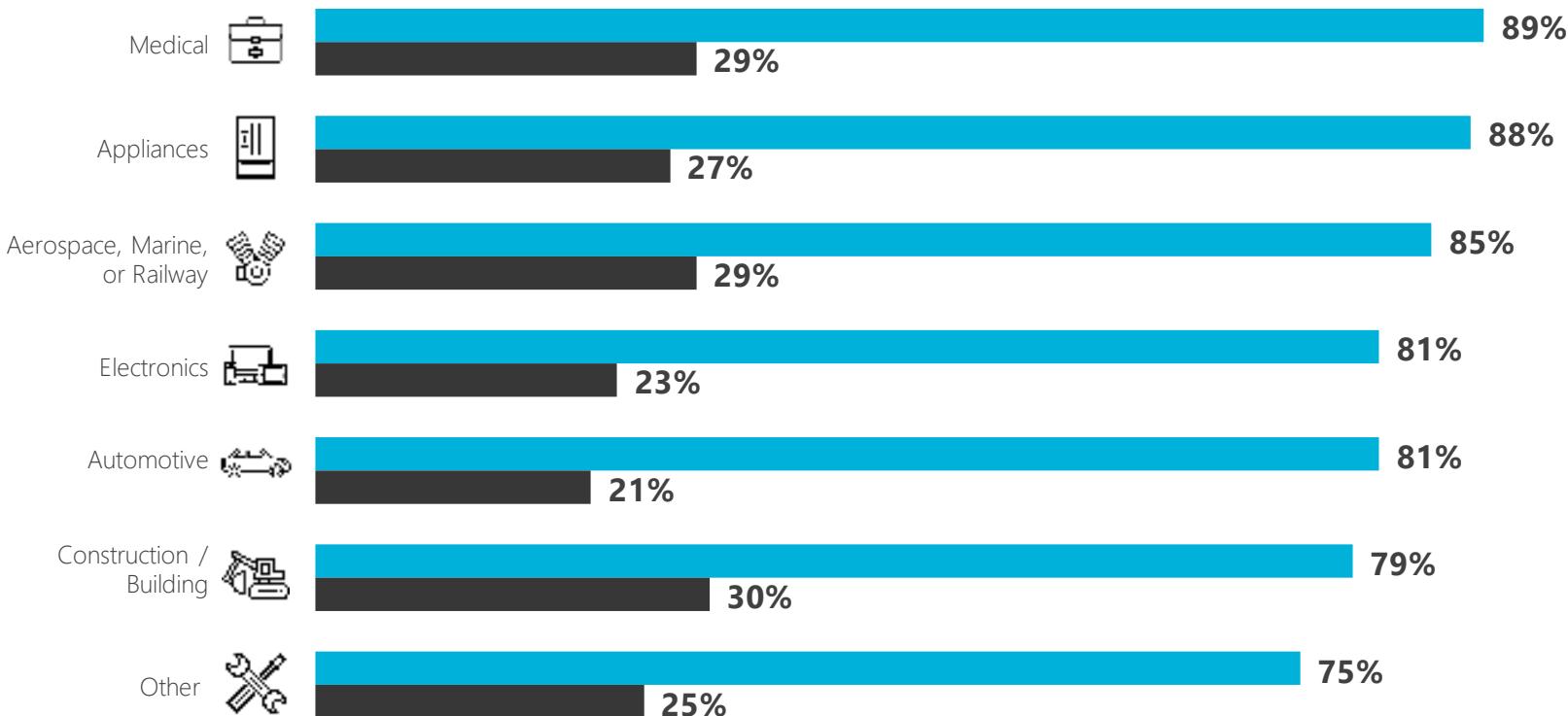
IDENTIFY the industries and applications that are most likely to convert

Market Research Findings:

PSA Tape has the greatest traction in Medical, Appliances, and Transportation

PSA TAPE USAGE

■ EVER USED ■ % OF PROJECTS USE



Market Research Findings:

CURRENT USAGE FOR BONDING

PSA Tapes 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

Market Research Findings:



Lightweight



Easy to use



Reputable brands



Superior stress distribution



Low cost



Fast application



Aesthetically pleasing



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

Highest Opportunity Segments



CONSTRUCTION

Significant opportunity to increase usage of PSA Tape

Large market, relatively low penetration for PSA Tape

Moderate-to-high potential for conversion



AUTOMOTIVE

Moderate-to-high conversion potential

Relatively strong current foothold in the industry



APPLIANCES

PSA is most effective bonding solution

Still offers significant conversion potential



MEDICAL

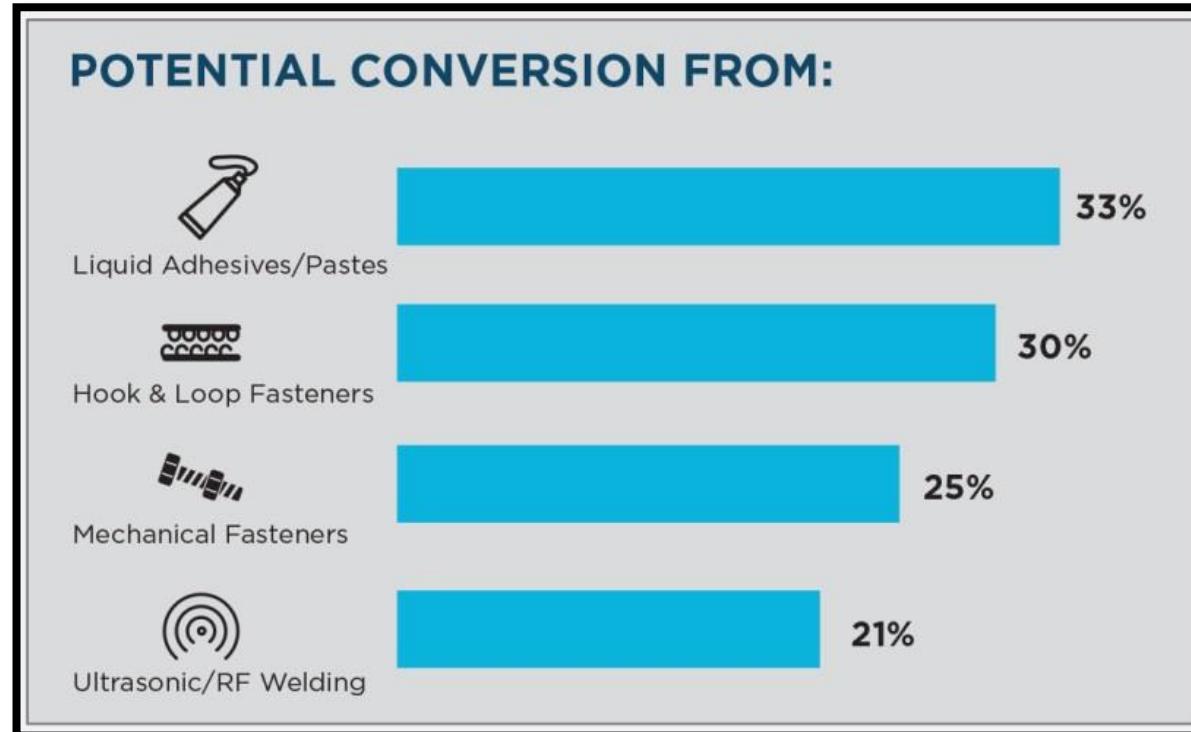
Conversion from liquid adhesives specifically

BUILDING & CONSTRUCTION

Large opportunity and growth market

Relevant for most members

Various Tape Applications



B&C Outreach Program:

Editors Events

Published byline articles

Engaging thought leaders

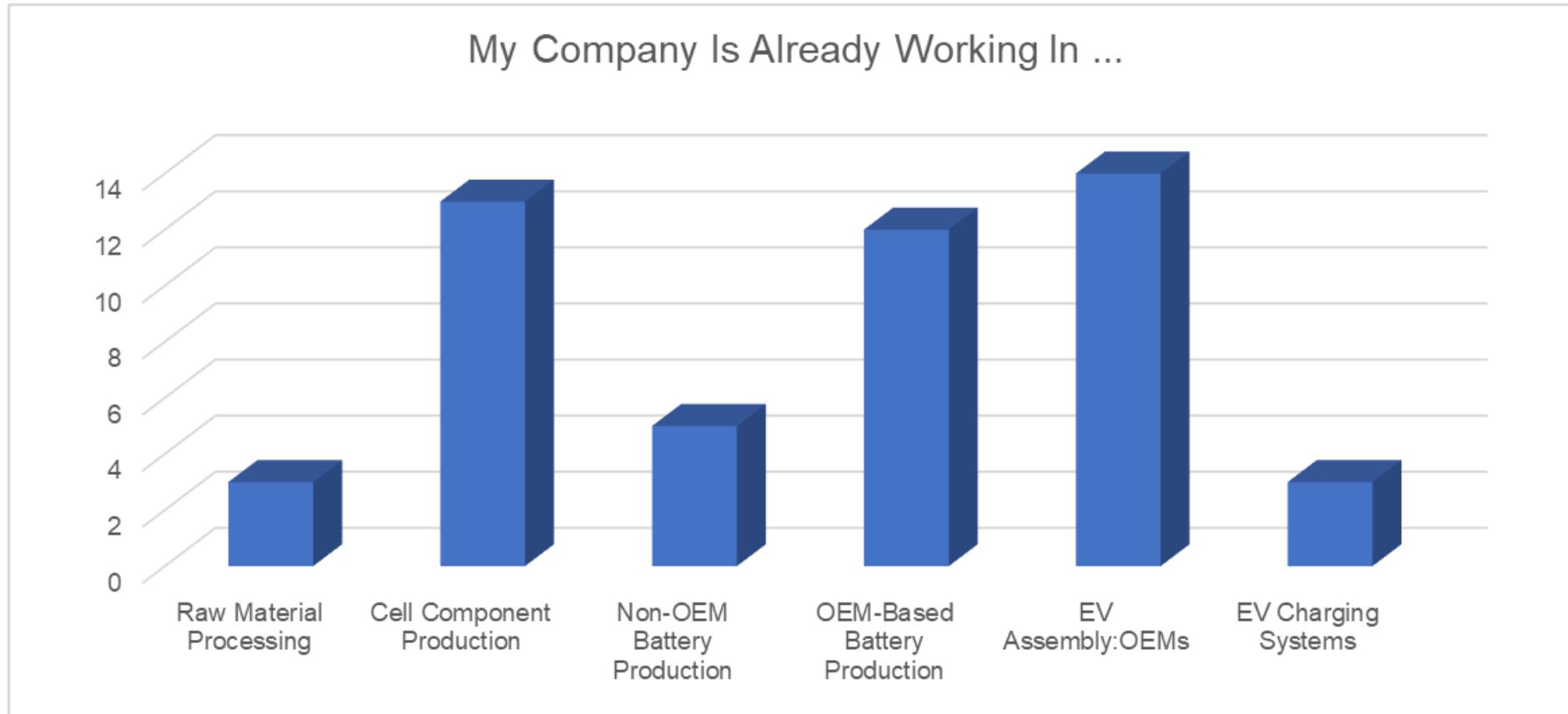
Participation in Trade Shows

Training Modules for Architects & Engineers



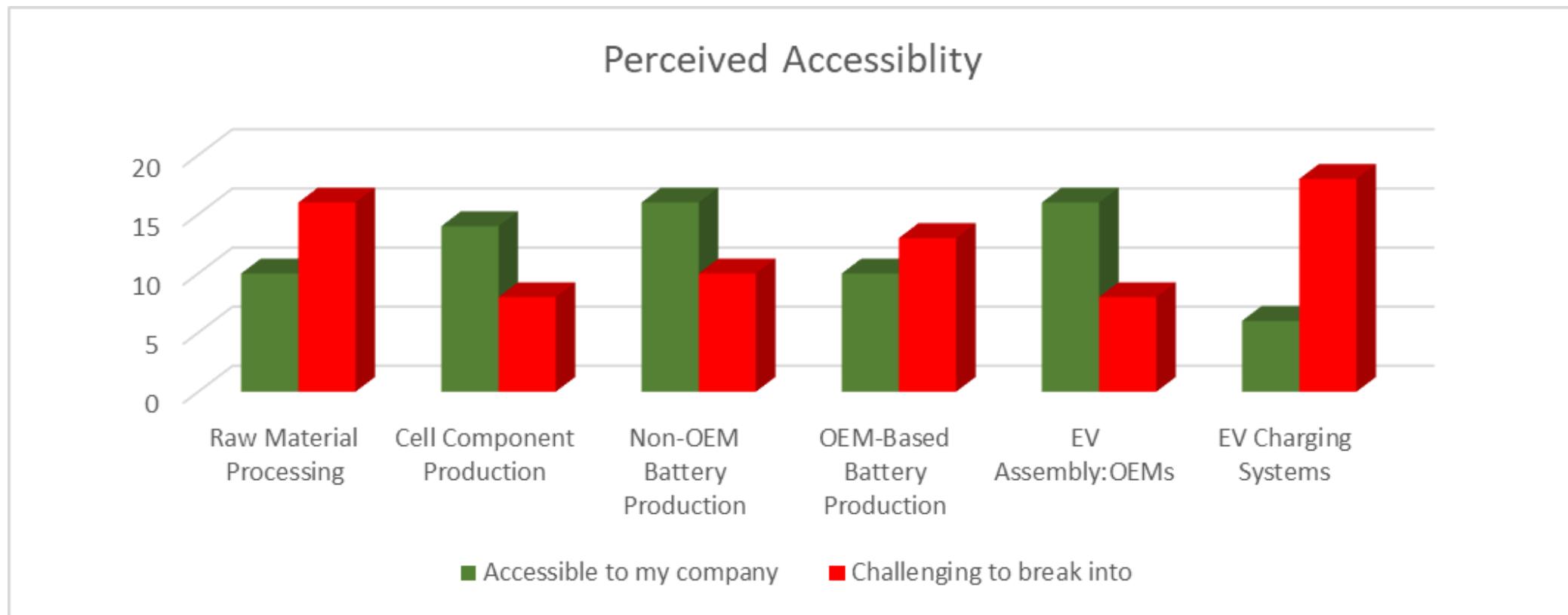
EV Batteries - Research

Member Market Participation:



EV Batteries - Research

Member Market Participation:



EV Batteries - Research

Innovations that may impact the ability to support needs in this vertical include:

- Thermal and/or electrically conductive adhesives
- Temperature sensing tapes
- Metallized films to replace foils
- Nanotechnologies
- New coatings, processes
- Tapes to bind new substrates

EV Batteries - Research

Factors of Consideration and further research:

- **Decision Makers, Influencers and Accessibility**
- **Application Areas:**

Vehicle/Battery Performance (Lightweighting, energy distribution, length/duration of charge, ...)

Vehicle/Battery Safety (Preventing thermal runaway, safety sensing systems, ...)

Sustainability (Reducing VOCs, creating a path for reuse/recycling, ...)

Scalability (Costs, lead times, ability to automate, ...)

Assembly aids

Fastening battery to vehicle

Diagnostics and sensors

Insulation

Wire/cable harnessing

Terminal kills

Battery labeling

Cell to cell bonding

...

THANK YOU!

QUESTIONS?