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Global Non-substrate Adhesive Tape Market Growth 2026-2032

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Abstracts

The global Non-substrate Adhesive Tape market size is predicted to grow from US$ 549 million in 2025 to US$ 956 million in 2032; it is expected to grow at a CAGR of 8.4% from 2026 to 2032.

A Non-substrate Adhesive Tape, also known as a transfer adhesive tape or unsupported adhesive film, is a pressure-sensitive adhesive layer coated onto a release liner without any backing material such as film, paper, or fabric. Because it consists of pure adhesive, it provides extremely thin, uniform bonding and is widely used in electronics assembly, automotive components, displays, labels, medical devices, and precision die-cut parts. The industry chain begins upstream with the production of acrylic, silicone, or rubber adhesive polymers; specialty additives; release liners (glassine, PET, PEK, kraft); and coating equipment. Midstream manufacturers—such as 3M, Nitto, Lintec, Tesa, and Avery Dennison—convert these raw materials through coating, curing, slitting, and lamination processes to produce transfer tapes in rolls or sheets. Downstream, converters and OEMs die-cut the adhesive films into customized shapes for use in smartphones, touch panels, sensors, nameplates, EV battery modules, medical wearables, industrial assembly, and signage bonding. The industry's average gross margin is generally 25–40%, the sector benefits from high-value specialty adhesives, growing demand in electronics and automotive applications, and the ongoing replacement of mechanical fasteners with lightweight adhesive bonding technologies.

In 2024, global Non-substrate Adhesive Tape sales volume reached approximately 65 million sqm, with an average global market price of around 8.3 US$ per sqm.

United States market for Non-substrate Adhesive Tape is estimated to increase from US$ million in 2025 to US$ million by 2032, at a CAGR of % from 2026 through 2032.

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China market for Non-substrate Adhesive Tape is estimated to increase from US$ million in 2025 to US$ million by 2032, at a CAGR of % from 2026 through 2032.

Europe market for Non-substrate Adhesive Tape is estimated to increase from US$ million in 2025 to US$ million by 2032, at a CAGR of % from 2026 through 2032.

Global key Non-substrate Adhesive Tape players cover 3M, Nitto Denko, Tesa, Lintec Corporation, Fuji Chemi, etc. In terms of revenue, the global two largest companies occupied for a share nearly % in 2025.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the “Non-substrate Adhesive Tape Industry Forecast” looks at past sales and reviews total world Non-substrate Adhesive Tape sales in 2025, providing a comprehensive analysis by region and market sector of projected Non-substrate Adhesive Tape sales for 2026 through 2032. With Non-substrate Adhesive Tape sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world Non-substrate Adhesive Tape industry.

This Insight Report provides a comprehensive analysis of the global Non-substrate Adhesive Tape landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Non-substrate Adhesive Tape portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global Non-substrate Adhesive Tape market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Non-substrate Adhesive Tape and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Non-substrate Adhesive Tape.

This report presents a comprehensive overview, market shares, and growth opportunities of Non-substrate Adhesive Tape market by product type, application, key

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manufacturers and key regions and countries.

Market Segmentation

Segmentation by Type:

Acrylic Adhesive Tape

Silicone Adhesive Tape

Other

Segmentation by Thickness Range:

Ultra-Thin Transfer Adhesive

Thick Transfer Adhesive

Segmentation by Application:

Industrial

Automotive

Electronics & Semiconductor

Medical & Healthcare

Other

This report also splits the market by region:

Americas

United States

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- Canada
- Mexico
- Brazil

APAC

- China
- Japan
- Korea
- Southeast Asia
- India
- Australia

Europe

- Germany
- France
- UK
- Italy
- Russia

Middle East & Africa

- Egypt
- South Africa

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Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

3M

Nitto Denko

Tesa

Lintec Corporation

Fuji Chemi

Avery Dennison

Teraoka

Soken

Bikom LLC

Swan Tape

Jorn Corporation

Crown New Materials

Seal King

Yousan Tape

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Key Questions Addressed in this Report

What is the 10-year outlook for the global Non-substrate Adhesive Tape market?

What factors are driving Non-substrate Adhesive Tape market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Non-substrate Adhesive Tape market opportunities vary by end market size?

How does Non-substrate Adhesive Tape break out by Type, by Application?

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Contents

1 SCOPE OF THE REPORT

1.1 Market Introduction
1.2 Years Considered
1.3 Research Objectives
1.4 Market Research Methodology
1.5 Research Process and Data Source
1.6 Economic Indicators
1.7 Currency Considered
1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

2.1 World Market Overview
  2.1.1 Global Non-substrate Adhesive Tape Annual Sales 2021-2032
  2.1.2 World Current & Future Analysis for Non-substrate Adhesive Tape by Geographic Region, 2021, 2025 & 2032
  2.1.3 World Current & Future Analysis for Non-substrate Adhesive Tape by Country/Region, 2021, 2025 & 2032
2.2 Non-substrate Adhesive Tape Segment by Type
  2.2.1 Acrylic Adhesive Tape
  2.2.2 Silicone Adhesive Tape
  2.2.3 Other
  2.2.4 Non-substrate Adhesive Tape Sales by Type
    2.2.4.1 Global Non-substrate Adhesive Tape Sales Market Share by Type (2021-2026)
    2.2.4.2 Global Non-substrate Adhesive Tape Revenue and Market Share by Type (2021-2026)
    2.2.4.3 Global Non-substrate Adhesive Tape Sale Price by Type (2021-2026)
2.3 Non-substrate Adhesive Tape Segment by Thickness Range
  2.3.1 Ultra-Thin Transfer Adhesive
  2.3.2 Thick Transfer Adhesive
  2.3.3 Non-substrate Adhesive Tape Sales by Thickness Range
    2.3.3.1 Global Non-substrate Adhesive Tape Sales Market Share by Thickness Range (2021-2026)
    2.3.3.2 Global Non-substrate Adhesive Tape Revenue and Market Share by Thickness Range (2021-2026)

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2.3.3.3 Global Non-substrate Adhesive Tape Sale Price by Thickness Range (2021-2026)
2.4 Non-substrate Adhesive Tape Segment by Application
2.4.1 Industrial
2.4.2 Automotive
2.4.3 Electronics & Semiconductor
2.4.4 Medical & Healthcare
2.4.5 Other
2.4.6 Non-substrate Adhesive Tape Sales by Application
2.4.6.1 Global Non-substrate Adhesive Tape Sale Market Share by Application (2021-2026)
2.4.6.2 Global Non-substrate Adhesive Tape Revenue and Market Share by Application (2021-2026)
2.4.6.3 Global Non-substrate Adhesive Tape Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global Non-substrate Adhesive Tape Breakdown Data by Company
3.1.1 Global Non-substrate Adhesive Tape Annual Sales by Company (2021-2026)
3.1.2 Global Non-substrate Adhesive Tape Sales Market Share by Company (2021-2026)
3.2 Global Non-substrate Adhesive Tape Annual Revenue by Company (2021-2026)
3.2.1 Global Non-substrate Adhesive Tape Revenue by Company (2021-2026)
3.2.2 Global Non-substrate Adhesive Tape Revenue Market Share by Company (2021-2026)
3.3 Global Non-substrate Adhesive Tape Sale Price by Company
3.4 Key Manufacturers Non-substrate Adhesive Tape Producing Area Distribution, Sales Area, Product Type
3.4.1 Key Manufacturers Non-substrate Adhesive Tape Product Location Distribution
3.4.2 Players Non-substrate Adhesive Tape Products Offered
3.5 Market Concentration Rate Analysis
3.5.1 Competition Landscape Analysis
3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
3.6 New Products and Potential Entrants
3.7 Market M&A Activity & Strategy

4 WORLD HISTORIC REVIEW FOR NON-SUBSTRATE ADHESIVE TAPE BY GEOGRAPHIC REGION

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4.1 World Historic Non-substrate Adhesive Tape Market Size by Geographic Region (2021-2026)
4.1.1 Global Non-substrate Adhesive Tape Annual Sales by Geographic Region (2021-2026)
4.1.2 Global Non-substrate Adhesive Tape Annual Revenue by Geographic Region (2021-2026)
4.2 World Historic Non-substrate Adhesive Tape Market Size by Country/Region (2021-2026)
4.2.1 Global Non-substrate Adhesive Tape Annual Sales by Country/Region (2021-2026)
4.2.2 Global Non-substrate Adhesive Tape Annual Revenue by Country/Region (2021-2026)
4.3 Americas Non-substrate Adhesive Tape Sales Growth
4.4 APAC Non-substrate Adhesive Tape Sales Growth
4.5 Europe Non-substrate Adhesive Tape Sales Growth
4.6 Middle East & Africa Non-substrate Adhesive Tape Sales Growth

5 AMERICAS

5.1 Americas Non-substrate Adhesive Tape Sales by Country
5.1.1 Americas Non-substrate Adhesive Tape Sales by Country (2021-2026)
5.1.2 Americas Non-substrate Adhesive Tape Revenue by Country (2021-2026)
5.2 Americas Non-substrate Adhesive Tape Sales by Type (2021-2026)
5.3 Americas Non-substrate Adhesive Tape Sales by Application (2021-2026)
5.4 United States
5.5 Canada
5.6 Mexico
5.7 Brazil

6 APAC

6.1 APAC Non-substrate Adhesive Tape Sales by Region
6.1.1 APAC Non-substrate Adhesive Tape Sales by Region (2021-2026)
6.1.2 APAC Non-substrate Adhesive Tape Revenue by Region (2021-2026)
6.2 APAC Non-substrate Adhesive Tape Sales by Type (2021-2026)
6.3 APAC Non-substrate Adhesive Tape Sales by Application (2021-2026)
6.4 China
6.5 Japan
6.6 South Korea

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6.7 Southeast Asia
6.8 India
6.9 Australia
6.10 China Taiwan

7 EUROPE

7.1 Europe Non-substrate Adhesive Tape by Country
  7.1.1 Europe Non-substrate Adhesive Tape Sales by Country (2021-2026)
  7.1.2 Europe Non-substrate Adhesive Tape Revenue by Country (2021-2026)
7.2 Europe Non-substrate Adhesive Tape Sales by Type (2021-2026)
7.3 Europe Non-substrate Adhesive Tape Sales by Application (2021-2026)
7.4 Germany
7.5 France
7.6 UK
7.7 Italy
7.8 Russia

8 MIDDLE EAST & AFRICA

8.1 Middle East & Africa Non-substrate Adhesive Tape by Country
  8.1.1 Middle East & Africa Non-substrate Adhesive Tape Sales by Country (2021-2026)
  8.1.2 Middle East & Africa Non-substrate Adhesive Tape Revenue by Country (2021-2026)
8.2 Middle East & Africa Non-substrate Adhesive Tape Sales by Type (2021-2026)
8.3 Middle East & Africa Non-substrate Adhesive Tape Sales by Application (2021-2026)
8.4 Egypt
8.5 South Africa
8.6 Israel
8.7 Turkey
8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

9.1 Market Drivers & Growth Opportunities
9.2 Market Challenges & Risks
9.3 Industry Trends

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info@marketpublishers.com

10 MANUFACTURING COST STRUCTURE ANALYSIS

10.1 Raw Material and Suppliers
10.2 Manufacturing Cost Structure Analysis of Non-substrate Adhesive Tape
10.3 Manufacturing Process Analysis of Non-substrate Adhesive Tape
10.4 Industry Chain Structure of Non-substrate Adhesive Tape

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel
  11.1.1 Direct Channels
  11.1.2 Indirect Channels
11.2 Non-substrate Adhesive Tape Distributors
11.3 Non-substrate Adhesive Tape Customer

12 WORLD FORECAST REVIEW FOR NON-SUBSTRATE ADHESIVE TAPE BY GEOGRAPHIC REGION

12.1 Global Non-substrate Adhesive Tape Market Size Forecast by Region
  12.1.1 Global Non-substrate Adhesive Tape Forecast by Region (2027-2032)
  12.1.2 Global Non-substrate Adhesive Tape Annual Revenue Forecast by Region (2027-2032)
12.2 Americas Forecast by Country (2027-2032)
12.3 APAC Forecast by Region (2027-2032)
12.4 Europe Forecast by Country (2027-2032)
12.5 Middle East & Africa Forecast by Country (2027-2032)
12.6 Global Non-substrate Adhesive Tape Forecast by Type (2027-2032)
12.7 Global Non-substrate Adhesive Tape Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 3M
  13.1.1 3M Company Information
  13.1.2 3M Non-substrate Adhesive Tape Product Portfolios and Specifications
  13.1.3 3M Non-substrate Adhesive Tape Sales, Revenue, Price and Gross Margin (2021-2026)
  13.1.4 3M Main Business Overview
  13.1.5 3M Latest Developments

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13.2 Nitto Denko
13.2.1 Nitto Denko Company Information
13.2.2 Nitto Denko Non-substrate Adhesive Tape Product Portfolios and Specifications
13.2.3 Nitto Denko Non-substrate Adhesive Tape Sales, Revenue, Price and Gross Margin (2021-2026)
13.2.4 Nitto Denko Main Business Overview
13.2.5 Nitto Denko Latest Developments
13.3 Tesa
13.3.1 Tesa Company Information
13.3.2 Tesa Non-substrate Adhesive Tape Product Portfolios and Specifications
13.3.3 Tesa Non-substrate Adhesive Tape Sales, Revenue, Price and Gross Margin (2021-2026)
13.3.4 Tesa Main Business Overview
13.3.5 Tesa Latest Developments
13.4 Lintec Corporation
13.4.1 Lintec Corporation Company Information
13.4.2 Lintec Corporation Non-substrate Adhesive Tape Product Portfolios and Specifications
13.4.3 Lintec Corporation Non-substrate Adhesive Tape Sales, Revenue, Price and Gross Margin (2021-2026)
13.4.4 Lintec Corporation Main Business Overview
13.4.5 Lintec Corporation Latest Developments
13.5 Fuji Chemi
13.5.1 Fuji Chemi Company Information
13.5.2 Fuji Chemi Non-substrate Adhesive Tape Product Portfolios and Specifications
13.5.3 Fuji Chemi Non-substrate Adhesive Tape Sales, Revenue, Price and Gross Margin (2021-2026)
13.5.4 Fuji Chemi Main Business Overview
13.5.5 Fuji Chemi Latest Developments
13.6 Avery Dennison
13.6.1 Avery Dennison Company Information
13.6.2 Avery Dennison Non-substrate Adhesive Tape Product Portfolios and Specifications
13.6.3 Avery Dennison Non-substrate Adhesive Tape Sales, Revenue, Price and Gross Margin (2021-2026)
13.6.4 Avery Dennison Main Business Overview
13.6.5 Avery Dennison Latest Developments
13.7 Teraoka
13.7.1 Teraoka Company Information

+357 96 030922
info@marketpublishers.com

13.7.2 Teraoka Non-substrate Adhesive Tape Product Portfolios and Specifications
13.7.3 Teraoka Non-substrate Adhesive Tape Sales, Revenue, Price and Gross Margin (2021-2026)
13.7.4 Teraoka Main Business Overview
13.7.5 Teraoka Latest Developments
13.8 Soken
13.8.1 Soken Company Information
13.8.2 Soken Non-substrate Adhesive Tape Product Portfolios and Specifications
13.8.3 Soken Non-substrate Adhesive Tape Sales, Revenue, Price and Gross Margin (2021-2026)
13.8.4 Soken Main Business Overview
13.8.5 Soken Latest Developments
13.9 Bikom LLC
13.9.1 Bikom LLC Company Information
13.9.2 Bikom LLC Non-substrate Adhesive Tape Product Portfolios and Specifications
13.9.3 Bikom LLC Non-substrate Adhesive Tape Sales, Revenue, Price and Gross Margin (2021-2026)
13.9.4 Bikom LLC Main Business Overview
13.9.5 Bikom LLC Latest Developments
13.10 Swan Tape
13.10.1 Swan Tape Company Information
13.10.2 Swan Tape Non-substrate Adhesive Tape Product Portfolios and Specifications
13.10.3 Swan Tape Non-substrate Adhesive Tape Sales, Revenue, Price and Gross Margin (2021-2026)
13.10.4 Swan Tape Main Business Overview
13.10.5 Swan Tape Latest Developments
13.11 Jorn Corporation
13.11.1 Jorn Corporation Company Information
13.11.2 Jorn Corporation Non-substrate Adhesive Tape Product Portfolios and Specifications
13.11.3 Jorn Corporation Non-substrate Adhesive Tape Sales, Revenue, Price and Gross Margin (2021-2026)
13.11.4 Jorn Corporation Main Business Overview
13.11.5 Jorn Corporation Latest Developments
13.12 Crown New Materials
13.12.1 Crown New Materials Company Information
13.12.2 Crown New Materials Non-substrate Adhesive Tape Product Portfolios and Specifications

+357 96 030922
info@marketpublishers.com

13.12.3 Crown New Materials Non-substrate Adhesive Tape Sales, Revenue, Price and Gross Margin (2021-2026)
13.12.4 Crown New Materials Main Business Overview
13.12.5 Crown New Materials Latest Developments
13.13 Seal King
13.13.1 Seal King Company Information
13.13.2 Seal King Non-substrate Adhesive Tape Product Portfolios and Specifications
13.13.3 Seal King Non-substrate Adhesive Tape Sales, Revenue, Price and Gross Margin (2021-2026)
13.13.4 Seal King Main Business Overview
13.13.5 Seal King Latest Developments
13.14 Yousan Tape
13.14.1 Yousan Tape Company Information
13.14.2 Yousan Tape Non-substrate Adhesive Tape Product Portfolios and Specifications
13.14.3 Yousan Tape Non-substrate Adhesive Tape Sales, Revenue, Price and Gross Margin (2021-2026)
13.14.4 Yousan Tape Main Business Overview
13.14.5 Yousan Tape Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

+357 96 030922
info@marketpublishers.com

List Of Tables

LIST OF TABLES

Table 1. Non-substrate Adhesive Tape Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & ($ millions)
Table 2. Non-substrate Adhesive Tape Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & ($ millions)
Table 3. Major Players of Acrylic Adhesive Tape
Table 4. Major Players of Silicone Adhesive Tape
Table 5. Major Players of Other
Table 6. Global Non-substrate Adhesive Tape Sales by Type (2021-2026) & (K Sqm)
Table 7. Global Non-substrate Adhesive Tape Sales Market Share by Type (2021-2026)
Table 8. Global Non-substrate Adhesive Tape Revenue by Type (2021-2026) & ($ million)
Table 9. Global Non-substrate Adhesive Tape Revenue Market Share by Type (2021-2026)
Table 10. Global Non-substrate Adhesive Tape Sale Price by Type (2021-2026) & (US$/Sq m)
Table 11. Major Players of Ultra-Thin Transfer Adhesive
Table 12. Major Players of Thick Transfer Adhesive
Table 13. Global Non-substrate Adhesive Tape Sales by Thickness Range (2021-2026) & (K Sqm)
Table 14. Global Non-substrate Adhesive Tape Sales Market Share by Thickness Range (2021-2026)
Table 15. Global Non-substrate Adhesive Tape Revenue by Thickness Range (2021-2026) & ($ million)
Table 16. Global Non-substrate Adhesive Tape Revenue Market Share by Thickness Range (2021-2026)
Table 17. Global Non-substrate Adhesive Tape Sale Price by Thickness Range (2021-2026) & (US$/Sq m)
Table 18. Global Non-substrate Adhesive Tape Sale by Application (2021-2026) & (K Sqm)
Table 19. Global Non-substrate Adhesive Tape Sale Market Share by Application (2021-2026)
Table 20. Global Non-substrate Adhesive Tape Revenue by Application (2021-2026) & ($ million)
Table 21. Global Non-substrate Adhesive Tape Revenue Market Share by Application (2021-2026)

+357 96 030922
info@marketpublishers.com

Table 22. Global Non-substrate Adhesive Tape Sale Price by Application (2021-2026) & (US$/Sq m)
Table 23. Global Non-substrate Adhesive Tape Sales by Company (2021-2026) & (K Sqm)
Table 24. Global Non-substrate Adhesive Tape Sales Market Share by Company (2021-2026)
Table 25. Global Non-substrate Adhesive Tape Revenue by Company (2021-2026) & ($ millions)
Table 26. Global Non-substrate Adhesive Tape Revenue Market Share by Company (2021-2026)
Table 27. Global Non-substrate Adhesive Tape Sale Price by Company (2021-2026) & (US$/Sq m)
Table 28. Key Manufacturers Non-substrate Adhesive Tape Producing Area Distribution and Sales Area
Table 29. Players Non-substrate Adhesive Tape Products Offered
Table 30. Non-substrate Adhesive Tape Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
Table 31. New Products and Potential Entrants
Table 32. Market M&A Activity & Strategy
Table 33. Global Non-substrate Adhesive Tape Sales by Geographic Region (2021-2026) & (K Sqm)
Table 34. Global Non-substrate Adhesive Tape Sales Market Share Geographic Region (2021-2026)
Table 35. Global Non-substrate Adhesive Tape Revenue by Geographic Region (2021-2026) & ($ millions)
Table 36. Global Non-substrate Adhesive Tape Revenue Market Share by Geographic Region (2021-2026)
Table 37. Global Non-substrate Adhesive Tape Sales by Country/Region (2021-2026) & (K Sqm)
Table 38. Global Non-substrate Adhesive Tape Sales Market Share by Country/Region (2021-2026)
Table 39. Global Non-substrate Adhesive Tape Revenue by Country/Region (2021-2026) & ($ millions)
Table 40. Global Non-substrate Adhesive Tape Revenue Market Share by Country/Region (2021-2026)
Table 41. Americas Non-substrate Adhesive Tape Sales by Country (2021-2026) & (K Sqm)
Table 42. Americas Non-substrate Adhesive Tape Sales Market Share by Country (2021-2026)

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Table 43. Americas Non-substrate Adhesive Tape Revenue by Country (2021-2026) & ($ millions)
Table 44. Americas Non-substrate Adhesive Tape Sales by Type (2021-2026) & (K Sqm)
Table 45. Americas Non-substrate Adhesive Tape Sales by Application (2021-2026) & (K Sqm)
Table 46. APAC Non-substrate Adhesive Tape Sales by Region (2021-2026) & (K Sqm)
Table 47. APAC Non-substrate Adhesive Tape Sales Market Share by Region (2021-2026)
Table 48. APAC Non-substrate Adhesive Tape Revenue by Region (2021-2026) & ($ millions)
Table 49. APAC Non-substrate Adhesive Tape Sales by Type (2021-2026) & (K Sqm)
Table 50. APAC Non-substrate Adhesive Tape Sales by Application (2021-2026) & (K Sqm)
Table 51. Europe Non-substrate Adhesive Tape Sales by Country (2021-2026) & (K Sqm)
Table 52. Europe Non-substrate Adhesive Tape Revenue by Country (2021-2026) & ($ millions)
Table 53. Europe Non-substrate Adhesive Tape Sales by Type (2021-2026) & (K Sqm)
Table 54. Europe Non-substrate Adhesive Tape Sales by Application (2021-2026) & (K Sqm)
Table 55. Middle East & Africa Non-substrate Adhesive Tape Sales by Country (2021-2026) & (K Sqm)
Table 56. Middle East & Africa Non-substrate Adhesive Tape Revenue Market Share by Country (2021-2026)
Table 57. Middle East & Africa Non-substrate Adhesive Tape Sales by Type (2021-2026) & (K Sqm)
Table 58. Middle East & Africa Non-substrate Adhesive Tape Sales by Application (2021-2026) & (K Sqm)
Table 59. Key Market Drivers & Growth Opportunities of Non-substrate Adhesive Tape
Table 60. Key Market Challenges & Risks of Non-substrate Adhesive Tape
Table 61. Key Industry Trends of Non-substrate Adhesive Tape
Table 62. Non-substrate Adhesive Tape Raw Material
Table 63. Key Suppliers of Raw Materials
Table 64. Non-substrate Adhesive Tape Distributors List
Table 65. Non-substrate Adhesive Tape Customer List
Table 66. Global Non-substrate Adhesive Tape Sales Forecast by Region (2027-2032) & (K Sqm)
Table 67. Global Non-substrate Adhesive Tape Revenue Forecast by Region

+357 96 030922
info@marketpublishers.com

(2027-2032) & ($ millions)
Table 68. Americas Non-substrate Adhesive Tape Sales Forecast by Country (2027-2032) & (K Sqm)
Table 69. Americas Non-substrate Adhesive Tape Annual Revenue Forecast by Country (2027-2032) & ($ millions)
Table 70. APAC Non-substrate Adhesive Tape Sales Forecast by Region (2027-2032) & (K Sqm)
Table 71. APAC Non-substrate Adhesive Tape Annual Revenue Forecast by Region (2027-2032) & ($ millions)
Table 72. Europe Non-substrate Adhesive Tape Sales Forecast by Country (2027-2032) & (K Sqm)
Table 73. Europe Non-substrate Adhesive Tape Revenue Forecast by Country (2027-2032) & ($ millions)
Table 74. Middle East & Africa Non-substrate Adhesive Tape Sales Forecast by Country (2027-2032) & (K Sqm)
Table 75. Middle East & Africa Non-substrate Adhesive Tape Revenue Forecast by Country (2027-2032) & ($ millions)
Table 76. Global Non-substrate Adhesive Tape Sales Forecast by Type (2027-2032) & (K Sqm)
Table 77. Global Non-substrate Adhesive Tape Revenue Forecast by Type (2027-2032) & ($ millions)
Table 78. Global Non-substrate Adhesive Tape Sales Forecast by Application (2027-2032) & (K Sqm)
Table 79. Global Non-substrate Adhesive Tape Revenue Forecast by Application (2027-2032) & ($ millions)
Table 80. 3M Basic Information, Non-substrate Adhesive Tape Manufacturing Base, Sales Area and Its Competitors
Table 81. 3M Non-substrate Adhesive Tape Product Portfolios and Specifications
Table 82. 3M Non-substrate Adhesive Tape Sales (K Sqm), Revenue ($ Million), Price (US$/Sq m) and Gross Margin (2021-2026)
Table 83. 3M Main Business
Table 84. 3M Latest Developments
Table 85. Nitto Denko Basic Information, Non-substrate Adhesive Tape Manufacturing Base, Sales Area and Its Competitors
Table 86. Nitto Denko Non-substrate Adhesive Tape Product Portfolios and Specifications
Table 87. Nitto Denko Non-substrate Adhesive Tape Sales (K Sqm), Revenue ($ Million), Price (US$/Sq m) and Gross Margin (2021-2026)
Table 88. Nitto Denko Main Business

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Table 89. Nitto Denko Latest Developments
Table 90. Tesa Basic Information, Non-substrate Adhesive Tape Manufacturing Base, Sales Area and Its Competitors
Table 91. Tesa Non-substrate Adhesive Tape Product Portfolios and Specifications
Table 92. Tesa Non-substrate Adhesive Tape Sales (K Sqm), Revenue ($ Million), Price (US$/Sq m) and Gross Margin (2021-2026)
Table 93. Tesa Main Business
Table 94. Tesa Latest Developments
Table 95. Lintec Corporation Basic Information, Non-substrate Adhesive Tape Manufacturing Base, Sales Area and Its Competitors
Table 96. Lintec Corporation Non-substrate Adhesive Tape Product Portfolios and Specifications
Table 97. Lintec Corporation Non-substrate Adhesive Tape Sales (K Sqm), Revenue ($ Million), Price (US$/Sq m) and Gross Margin (2021-2026)
Table 98. Lintec Corporation Main Business
Table 99. Lintec Corporation Latest Developments
Table 100. Fuji Chemi Basic Information, Non-substrate Adhesive Tape Manufacturing Base, Sales Area and Its Competitors
Table 101. Fuji Chemi Non-substrate Adhesive Tape Product Portfolios and Specifications
Table 102. Fuji Chemi Non-substrate Adhesive Tape Sales (K Sqm), Revenue ($ Million), Price (US$/Sq m) and Gross Margin (2021-2026)
Table 103. Fuji Chemi Main Business
Table 104. Fuji Chemi Latest Developments
Table 105. Avery Dennison Basic Information, Non-substrate Adhesive Tape Manufacturing Base, Sales Area and Its Competitors
Table 106. Avery Dennison Non-substrate Adhesive Tape Product Portfolios and Specifications
Table 107. Avery Dennison Non-substrate Adhesive Tape Sales (K Sqm), Revenue ($ Million), Price (US$/Sq m) and Gross Margin (2021-2026)
Table 108. Avery Dennison Main Business
Table 109. Avery Dennison Latest Developments
Table 110. Teraoka Basic Information, Non-substrate Adhesive Tape Manufacturing Base, Sales Area and Its Competitors
Table 111. Teraoka Non-substrate Adhesive Tape Product Portfolios and Specifications
Table 112. Teraoka Non-substrate Adhesive Tape Sales (K Sqm), Revenue ($ Million), Price (US$/Sq m) and Gross Margin (2021-2026)
Table 113. Teraoka Main Business
Table 114. Teraoka Latest Developments

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Table 115. Soken Basic Information, Non-substrate Adhesive Tape Manufacturing Base, Sales Area and Its Competitors
Table 116. Soken Non-substrate Adhesive Tape Product Portfolios and Specifications
Table 117. Soken Non-substrate Adhesive Tape Sales (K Sqm), Revenue ($ Million), Price (US$/Sq m) and Gross Margin (2021-2026)
Table 118. Soken Main Business
Table 119. Soken Latest Developments
Table 120. Bikom LLC Basic Information, Non-substrate Adhesive Tape Manufacturing Base, Sales Area and Its Competitors
Table 121. Bikom LLC Non-substrate Adhesive Tape Product Portfolios and Specifications
Table 122. Bikom LLC Non-substrate Adhesive Tape Sales (K Sqm), Revenue ($ Million), Price (US$/Sq m) and Gross Margin (2021-2026)
Table 123. Bikom LLC Main Business
Table 124. Bikom LLC Latest Developments
Table 125. Swan Tape Basic Information, Non-substrate Adhesive Tape Manufacturing Base, Sales Area and Its Competitors
Table 126. Swan Tape Non-substrate Adhesive Tape Product Portfolios and Specifications
Table 127. Swan Tape Non-substrate Adhesive Tape Sales (K Sqm), Revenue ($ Million), Price (US$/Sq m) and Gross Margin (2021-2026)
Table 128. Swan Tape Main Business
Table 129. Swan Tape Latest Developments
Table 130. Jorn Corporation Basic Information, Non-substrate Adhesive Tape Manufacturing Base, Sales Area and Its Competitors
Table 131. Jorn Corporation Non-substrate Adhesive Tape Product Portfolios and Specifications
Table 132. Jorn Corporation Non-substrate Adhesive Tape Sales (K Sqm), Revenue ($ Million), Price (US$/Sq m) and Gross Margin (2021-2026)
Table 133. Jorn Corporation Main Business
Table 134. Jorn Corporation Latest Developments
Table 135. Crown New Materials Basic Information, Non-substrate Adhesive Tape Manufacturing Base, Sales Area and Its Competitors
Table 136. Crown New Materials Non-substrate Adhesive Tape Product Portfolios and Specifications
Table 137. Crown New Materials Non-substrate Adhesive Tape Sales (K Sqm), Revenue ($ Million), Price (US$/Sq m) and Gross Margin (2021-2026)
Table 138. Crown New Materials Main Business
Table 139. Crown New Materials Latest Developments

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Table 140. Seal King Basic Information, Non-substrate Adhesive Tape Manufacturing Base, Sales Area and Its Competitors
Table 141. Seal King Non-substrate Adhesive Tape Product Portfolios and Specifications
Table 142. Seal King Non-substrate Adhesive Tape Sales (K Sqm), Revenue ($ Million), Price (US$/Sq m) and Gross Margin (2021-2026)
Table 143. Seal King Main Business
Table 144. Seal King Latest Developments
Table 145. Yousan Tape Basic Information, Non-substrate Adhesive Tape Manufacturing Base, Sales Area and Its Competitors
Table 146. Yousan Tape Non-substrate Adhesive Tape Product Portfolios and Specifications
Table 147. Yousan Tape Non-substrate Adhesive Tape Sales (K Sqm), Revenue ($ Million), Price (US$/Sq m) and Gross Margin (2021-2026)
Table 148. Yousan Tape Main Business
Table 149. Yousan Tape Latest Developments

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List Of Figures

LIST OF FIGURES

Figure 1. Picture of Non-substrate Adhesive Tape
Figure 2. Non-substrate Adhesive Tape Report Years Considered
Figure 3. Research Objectives
Figure 4. Research Methodology
Figure 5. Research Process and Data Source
Figure 6. Global Non-substrate Adhesive Tape Sales Growth Rate 2021-2032 (K Sqm)
Figure 7. Global Non-substrate Adhesive Tape Revenue Growth Rate 2021-2032 ($ millions)
Figure 8. Non-substrate Adhesive Tape Sales by Geographic Region (2021, 2025 & 2032) & ($ millions)
Figure 9. Non-substrate Adhesive Tape Sales Market Share by Country/Region (2025)
Figure 10. Non-substrate Adhesive Tape Sales Market Share by Country/Region (2021, 2025 & 2032)
Figure 11. Product Picture of Acrylic Adhesive Tape
Figure 12. Product Picture of Silicone Adhesive Tape
Figure 13. Product Picture of Other
Figure 14. Global Non-substrate Adhesive Tape Sales Market Share by Type in 2026
Figure 15. Global Non-substrate Adhesive Tape Revenue Market Share by Type (2021-2026)
Figure 16. Product Picture of Ultra-Thin Transfer Adhesive
Figure 17. Product Picture of Thick Transfer Adhesive
Figure 18. Global Non-substrate Adhesive Tape Sales Market Share by Thickness Range in 2026
Figure 19. Global Non-substrate Adhesive Tape Revenue Market Share by Thickness Range (2021-2026)
Figure 20. Non-substrate Adhesive Tape Consumed in Industrial
Figure 21. Global Non-substrate Adhesive Tape Market: Industrial (2021-2026) & (K Sqm)
Figure 22. Non-substrate Adhesive Tape Consumed in Automotive
Figure 23. Global Non-substrate Adhesive Tape Market: Automotive (2021-2026) & (K Sqm)
Figure 24. Non-substrate Adhesive Tape Consumed in Electronics & Semiconductor
Figure 25. Global Non-substrate Adhesive Tape Market: Electronics & Semiconductor (2021-2026) & (K Sqm)
Figure 26. Non-substrate Adhesive Tape Consumed in Medical & Healthcare

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Figure 27. Global Non-substrate Adhesive Tape Market: Medical & Healthcare (2021-2026) & (K Sqm)
Figure 28. Non-substrate Adhesive Tape Consumed in Other
Figure 29. Global Non-substrate Adhesive Tape Market: Other (2021-2026) & (K Sqm)
Figure 30. Global Non-substrate Adhesive Tape Sale Market Share by Application (2025)
Figure 31. Global Non-substrate Adhesive Tape Revenue Market Share by Application in 2026
Figure 32. Non-substrate Adhesive Tape Sales by Company in 2026 (K Sqm)
Figure 33. Global Non-substrate Adhesive Tape Sales Market Share by Company in 2026
Figure 34. Non-substrate Adhesive Tape Revenue by Company in 2026 ($ millions)
Figure 35. Global Non-substrate Adhesive Tape Revenue Market Share by Company in 2026
Figure 36. Global Non-substrate Adhesive Tape Sales Market Share by Geographic Region (2021-2026)
Figure 37. Global Non-substrate Adhesive Tape Revenue Market Share by Geographic Region in 2026
Figure 38. Americas Non-substrate Adhesive Tape Sales 2021-2026 (K Sqm)
Figure 39. Americas Non-substrate Adhesive Tape Revenue 2021-2026 ($ millions)
Figure 40. APAC Non-substrate Adhesive Tape Sales 2021-2026 (K Sqm)
Figure 41. APAC Non-substrate Adhesive Tape Revenue 2021-2026 ($ millions)
Figure 42. Europe Non-substrate Adhesive Tape Sales 2021-2026 (K Sqm)
Figure 43. Europe Non-substrate Adhesive Tape Revenue 2021-2026 ($ millions)
Figure 44. Middle East & Africa Non-substrate Adhesive Tape Sales 2021-2026 (K Sqm)
Figure 45. Middle East & Africa Non-substrate Adhesive Tape Revenue 2021-2026 ($ millions)
Figure 46. Americas Non-substrate Adhesive Tape Sales Market Share by Country in 2026
Figure 47. Americas Non-substrate Adhesive Tape Revenue Market Share by Country (2021-2026)
Figure 48. Americas Non-substrate Adhesive Tape Sales Market Share by Type (2021-2026)
Figure 49. Americas Non-substrate Adhesive Tape Sales Market Share by Application (2021-2026)
Figure 50. United States Non-substrate Adhesive Tape Revenue Growth 2021-2026 ($ millions)
Figure 51. Canada Non-substrate Adhesive Tape Revenue Growth 2021-2026 ($

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millions)
Figure 52. Mexico Non-substrate Adhesive Tape Revenue Growth 2021-2026 ($ millions)
Figure 53. Brazil Non-substrate Adhesive Tape Revenue Growth 2021-2026 ($ millions)
Figure 54. APAC Non-substrate Adhesive Tape Sales Market Share by Region in 2026
Figure 55. APAC Non-substrate Adhesive Tape Revenue Market Share by Region (2021-2026)
Figure 56. APAC Non-substrate Adhesive Tape Sales Market Share by Type (2021-2026)
Figure 57. APAC Non-substrate Adhesive Tape Sales Market Share by Application (2021-2026)
Figure 58. China Non-substrate Adhesive Tape Revenue Growth 2021-2026 ($ millions)
Figure 59. Japan Non-substrate Adhesive Tape Revenue Growth 2021-2026 ($ millions)
Figure 60. South Korea Non-substrate Adhesive Tape Revenue Growth 2021-2026 ($ millions)
Figure 61. Southeast Asia Non-substrate Adhesive Tape Revenue Growth 2021-2026 ($ millions)
Figure 62. India Non-substrate Adhesive Tape Revenue Growth 2021-2026 ($ millions)
Figure 63. Australia Non-substrate Adhesive Tape Revenue Growth 2021-2026 ($ millions)
Figure 64. China Taiwan Non-substrate Adhesive Tape Revenue Growth 2021-2026 ($ millions)
Figure 65. Europe Non-substrate Adhesive Tape Sales Market Share by Country in 2026
Figure 66. Europe Non-substrate Adhesive Tape Revenue Market Share by Country (2021-2026)
Figure 67. Europe Non-substrate Adhesive Tape Sales Market Share by Type (2021-2026)
Figure 68. Europe Non-substrate Adhesive Tape Sales Market Share by Application (2021-2026)
Figure 69. Germany Non-substrate Adhesive Tape Revenue Growth 2021-2026 ($ millions)
Figure 70. France Non-substrate Adhesive Tape Revenue Growth 2021-2026 ($ millions)
Figure 71. UK Non-substrate Adhesive Tape Revenue Growth 2021-2026 ($ millions)
Figure 72. Italy Non-substrate Adhesive Tape Revenue Growth 2021-2026 ($ millions)
Figure 73. Russia Non-substrate Adhesive Tape Revenue Growth 2021-2026 ($ millions)
Figure 74. Middle East & Africa Non-substrate Adhesive Tape Sales Market Share by

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Country (2021-2026)
Figure 75. Middle East & Africa Non-substrate Adhesive Tape Sales Market Share by Type (2021-2026)
Figure 76. Middle East & Africa Non-substrate Adhesive Tape Sales Market Share by Application (2021-2026)
Figure 77. Egypt Non-substrate Adhesive Tape Revenue Growth 2021-2026 ($ millions)
Figure 78. South Africa Non-substrate Adhesive Tape Revenue Growth 2021-2026 ($ millions)
Figure 79. Israel Non-substrate Adhesive Tape Revenue Growth 2021-2026 ($ millions)
Figure 80. Turkey Non-substrate Adhesive Tape Revenue Growth 2021-2026 ($ millions)
Figure 81. GCC Countries Non-substrate Adhesive Tape Revenue Growth 2021-2026 ($ millions)
Figure 82. Manufacturing Cost Structure Analysis of Non-substrate Adhesive Tape in 2026
Figure 83. Manufacturing Process Analysis of Non-substrate Adhesive Tape
Figure 84. Industry Chain Structure of Non-substrate Adhesive Tape
Figure 85. Channels of Distribution
Figure 86. Global Non-substrate Adhesive Tape Sales Market Forecast by Region (2027-2032)
Figure 87. Global Non-substrate Adhesive Tape Revenue Market Share Forecast by Region (2027-2032)
Figure 88. Global Non-substrate Adhesive Tape Sales Market Share Forecast by Type (2027-2032)
Figure 89. Global Non-substrate Adhesive Tape Revenue Market Share Forecast by Type (2027-2032)
Figure 90. Global Non-substrate Adhesive Tape Sales Market Share Forecast by Application (2027-2032)
Figure 91. Global Non-substrate Adhesive Tape Revenue Market Share Forecast by Application (2027-2032)

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