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# Global Non-substrate Double-sided Tape Market Growth 2026-2032

https://marketpublishers.com/r/GF451879FF25EN.html
Date: October 2026
Pages: 119
Price: US$ 3,660.00 (Single User License)
ID: GF451879FF25EN

## Abstracts

The global Non-substrate Double-sided 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 Double-sided Tape—also called double-coated transfer adhesive tape or unsupported double-sided adhesive film—is a bonding material consisting of adhesive on both sides of a release liner, but without any backing substrate such as PET, tissue, foam, or cloth. Because it is composed entirely of adhesive, it offers extremely thin, flexible, and uniform bonding with high tack and shear strength, making it ideal for precision electronic assembly, nameplates, displays, sensors, die-cut components, and automotive interior parts. The industry chain begins upstream with raw adhesive materials (acrylic, silicone, rubber polymers), tackifiers, crosslinkers, release liners (PET, glassine, kraft), and solvent or hot-melt coating chemicals. In the midstream, manufacturers such as 3M, Nitto, Tesa, Lintec, and Avery Dennison use coating, drying/curing, and lamination technologies to apply adhesive to both sides of a release liner, producing rolls or sheets of non-substrate double-sided tape. Downstream, tape converters, die-cutting companies, and OEMs process these rolls into custom shapes for smartphones, touch panels, battery modules, automotive trims, appliances, and precision industrial assembly. The industry average gross margin typically ranges from 25–40%, Demand continues to grow due to miniaturization in electronics, the shift toward lightweight bonding in automotive applications, and the replacement of mechanical fasteners with high-performance adhesive solutions.

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

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

China market for Non-substrate Double-sided 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 Double-sided 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 Double-sided 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 Double-sided Tape Industry Forecast” looks at past sales and reviews total world Non-substrate Double-sided Tape sales in 2025, providing a comprehensive analysis by region and market sector of projected Non-substrate Double-sided Tape sales for 2026 through 2032. With Non-substrate Double-sided 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 Double-sided Tape industry.

This Insight Report provides a comprehensive analysis of the global Non-substrate Double-sided 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 Double-sided 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 Double-sided Tape market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Non-substrate Double-sided 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 Double-sided

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Tape.

This report presents a comprehensive overview, market shares, and growth opportunities of Non-substrate Double-sided Tape market by product type, application, key manufacturers and key regions and countries.

## Market Segmentation

### Segmentation by Type:

Acrylic Adhesive Tape

Silicone Adhesive Tape

Other

### Segmentation by Thickness:

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:

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- Americas
  - United States
  - Canada
  - Mexico
  - Brazil
- APAC
  - China
  - Japan
  - Korea
  - Southeast Asia
  - India
  - Australia
- Europe
  - Germany
  - France
  - UK
  - Italy
  - Russia
- Middle East & Africa
  - Egypt

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South Africa

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

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Yousan Tape

## Key Questions Addressed in this Report

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

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

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

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

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

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