Linerless Labels - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-04-28 | 125 pages | Mordor Intelligence

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Report description:

The Linerless Labels Market size is estimated at USD 2.04 billion in 2025, and is expected to reach USD 2.64 billion by 2030, at a CAGR of 5.28% during the forecast period (2025-2030).

Key Highlights
- Linerless labels have been gaining popularity because they eliminate the need for non-recyclable release liners and reduce costs. Continuous product innovation for linerless labels will sustain future market development. Linerless also offers optimum adhesive placement, wrinkle-free attachment on low-stability surfaces, and thermal transfer variable printability. Linerless labels generate minimum waste compared with pressure-sensitive labels, while the same diameter roll carries a much higher volume of linerless labels.
- Even though linerless labels provide all the benefits of self-adhesive labeling, with improved efficiencies, volume applications, and environmental advantages through their non-utilization of carrier backing paper, they are not an ideal solution for all label production as there are certain limitations.
- All printed labels are positioned on a continuous substrate web until dispensed. For separation, they must either be cut or supplied with a perforation line. The use of transparent substrates and the printing of opaque white prior to the application of the colored inks may contribute to overcoming the limitations in shape. However, this further restricts the range of use for linerless labels. Product innovation for linerless labels, including developments in face stock, adhesives, printable silicone coatings, application equipment, and converting equipment, will support further growth of the sector. The market is witnessing technological innovations owing to the research and development carried out by the players in the market. Such innovations are expected to boost the adoption of linerless labels over the forecast period.
- The packaged food and beverage industry has witnessed a significant increase in demand which is driving the need for liner-free labels and thereby aiding the growth of the market. Several industry guidelines by the government for packaged food have also

shaped the demand for linerless labels. According to FDA, packaged and processed food items must have nutritional labeling that makes labeling important. The Food Safety Modernization Act mandates consumer packaged goods to be able to, at minimum, identify the immediate supplier and recipient (other than retailers to consumers) of a product to monitor the path of their products. Such regulations aid the use of linerless labels in packaged food.

- Linerless labels penetrated the market much after the traditional liner labels were made available in the market. Although linerless labels have made great strides in terms of adoption, the market still has a significant number of alternatives, including various kinds of pressure-sensitive labels, which have presented a challenge for the growth of the studied market.
- The linerless label segment has been considered stable in the COVID-19 period, owing to the increasing demand for food and pharmaceutical packaging. The COVID-19 outbreak disrupted the supply chain across various end-user industries, like food and beverage, healthcare, and industrial, among others. The pandemic created unprecedented challenges for supply chain and logistics management in the last few months. Products like canned food, toilet paper, and cleaning supplies have witnessed a significant rise in demand, while other end-use sectors have slowed dramatically.

Linerless Labels Market Trends

Food and Beverage Expected to Hold the Largest Market Share

- With labor shortages, customer expectations, automation quandaries, and the high cost of doing business, e-commerce companies face numerous challenges, and optimizing processes is a priority. This is especially important in distribution and fulfillment centers, where many executives look for ways to improve operations such as inventory management, order picking, order releasing, and packing. Using linerless labels is a simple way to improve the packing process and save money within the beverage sector.
- The alcoholic drinks market for linerless labels is backed by rising off-trade sales, a growing tourism and hospitality industry, and increasing disposable incomes among an expanding middle class in developing nations. The market is also witnessing an increased demand from the North American Region. For instance, in 2021, According to StatCan, consumers living in the Canadian province of Quebec drink the most frequently, with approximately 57% of respondents stating that they drink alcohol at least once a week. This figure decreases to 28% in Atlantic Canada. It appears that political party preference also affects alcohol intake, with those supporting the Liberal party most likely to drink at least once a week.
- The Food Safety and Standards Authority of India (FSSAI) implemented the mandatory attachment of warning labels to all alcoholic beverages, as these warning labels fall under the jurisdiction of the country's Food Safety and Standards (Alcoholic Beverages Standards) Regulations. Such standards would promote the growth of the studied market.
- The growing consumption of packaged and processed food due to rapid urbanization and industrialization has been driving the studied market's growth. With the rising consumption of sweets and confectionery, several packaging providers are offering packaging solutions, specifically catering to this demand, and are further driving their sales and revenues. For instance, according to the US Census Bureau, confectionery manufacturing industry revenue in the United States is expected to reach USD 10.89 billion by FY 2023.
- Consumers are increasingly demanding more sustainability initiatives from the brands they select and the stores they visit as societies continue to seek new ways to address pressing issues like carbon emissions, biodiversity loss, resource shortages, and waste. Any solution that improves efficiency and reduces waste gives a significant opportunity for retailers to advance their business in a more sustainable direction and demonstrate their commitment to addressing these issues.

Asia-Pacific Expected to Register Fastest Market Growth

- The growth of linerless labels in the Asia-Pacific region is mainly attributable to the growing applications of such labels in the end-user industries, like food and beverage and retail in economies like China, India, and Japan.
- The growing consumption of packaged and processed food in the region due to rapid urbanization and industrialization has been driving the studied market's growth positively in the region. For instance, according to the National Bureau of Statistics of China, in 2021, about 64.8% of the total population lived in cities. This has resulted in an increasing demand for food and made China one of the world's largest food and beverage industries.
- Linerless labels have been predominantly used for meat, fish, and retail poultry packaging and emerging in chilled, convenience, and product categories. According to Eastspring, in 2021, the food and beverage (F&B) sector in China was expected to be rapidly expanding. Sales were estimated to reach USD 176 billion in 2021, accounting for 63% of worldwide F&B revenue. Between 2021 and 2025, the yearly revenue growth rate is expected to be 8.38%.
- In recent years, India has witnessed sustainable packaging growth, owing to the increase in packaged food consumption and awareness and demand for quality products. Consumer awareness surrounding packaged food has heightened.
- With the increase in income and discretionary spending, there is a need for convenience and quality in food, which has been driving most of the packaged food industry in the country. Lifestyle changes have caused a shift in Indian consumer habits from the consumption of traditional food to more urban food habits consisting of packaged and processed foods.

Linerless Labels Industry Overview

The intensity of competitive rivalry is shaped by firm concentration ratio, barriers of entry for new entrants, and the extent of market leaders' domination. The major players in the linerless label market offer diverse product portfolios, with a focus on sales and R&D activities to improve their market positions.

- Jan 2022 - The ProPrint Group has grown by adding a third location in Wellingborough. The new 33,000-square-foot office and warehouse will serve as a customer support center and provide more storage for inventory. ProPrintGroup now has a total of 78,000 square feet spread across three locations.
- Dec 2021 - Etiket Schiller, a manufacturer of self-adhesive labels, joined the Optimum Group's German platform. Etiket Schiller will be able to better serve their clients as part of the Optimum Company, with additional capacity, a wider selection of self-adhesive labels and flexible packaging solutions, and higher delivery dependability as part of an international printing group.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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