

Release Liners - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-07-01 | 120 pages | Mordor Intelligence

AVAILABLE LICENSES:

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

Report description:

Release Liners Market Analysis

The Release Liners Market size is estimated at USD 17.13 billion in 2025, and is expected to reach USD 23.37 billion by 2030, at a CAGR of 6.41% during the forecast period (2025-2030). Steady demand stems from e-commerce logistics, premium food packaging, and advanced industrial tapes, all of which require consistent release performance and tight dimensional tolerances. Labels remain the anchor application, yet medical devices, prepreg composites, and battery cell tapes are expanding faster and reshaping the product mix toward higher-margin, technology-intensive constructions. Asia-Pacific's dual leadership in volume and growth reinforces production scale advantages while exposing Western brand owners to supply-chain concentration risks. Material innovation is accelerating: glassine paper still dominates, but filmic and poly-coated alternatives are growing quickly as converters seek moisture, heat, and chemical resistance without sacrificing recyclability.

Global Release Liners Market Trends and Insights

Growing Demand for Clean-Label Packaging in Food and Beverage

Food and beverage brand owners are replacing bleached substrates and solvent-based coatings with unbleached glassine, water-borne silicones, and compostable chemistries that meet direct-food-contact rules. LINTEC's natural-tone glassine illustrates the pivot toward minimally processed papers that enable gravure print fidelity while eliminating optical brighteners. Functional performance now extends to barrier protection against grease and moisture, permitting clear ingredient transparency without

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

adhesive migration. Converters able to document traceability capture price premiums as retailers tighten sustainability scorecards. Demand for PFAS-free systems is spreading from the EU to North America, pushing suppliers to scale fluorine-free alternatives that still release cleanly at high application speeds. With food and beverage holding 29.26% share in 2024, iterative material upgrades ripple quickly across global volumes and reinforce supplier qualification hurdles.

E-commerce Boom Accelerating Label Demand

Parcel volumes continue rising with click-and-collect, subscription, and same-day delivery models. Release liners must perform across automated print-apply lines that exceed 150 m/min, handle variable-data barcoding, and endure cold-chain swings from ?20 C to 40 C. Consistent release force and web flatness minimize downtime and misapplies, directly influencing fulfillment cost per package. Premium unboxing trends now extend to omnichannel grocery and personal-care shipments, boosting demand for multi-layer labels with tactile varnishes and metallic accents. These constructions rely on precision-coated liners to protect ink integrity until point-of-use. The release liner market, therefore, sees volume gains plus a value shift toward high-spec paper and film backings optimized for robotics and vision inspection equipment.

Release-Liner Waste Disposal Challenges

Used liner is largely landfilled because silicone residues impede standard recycling. FINAT's CELAB-Europe consortium aims for 75% recycling by 2025, but progress hinges on collection logistics and end-market demand for recovered fibers. Western Michigan University's water-soluble barrier layer enables silicone removal during pulping, yet commercial adoption remains limited by process retrofits and bale transport costs. Sustana Group's Wisconsin plant shows technical feasibility, but its geographic reach is narrow. As Extended Producer Responsibility schemes spread, converters face escalating fees that erode price competitiveness versus linerless or reusable formats.

Other drivers and restraints analyzed in the detailed report include:

Uptake of Premium Hygiene and Medical Tapes / Aerospace and Wind Prepregs Needing Specialty Liners / Volatile Pulp and Silicone Raw-Material Prices /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Glassine retained 37.18% share of release liner market size in 2024 and continues to anchor high-volume label and tape programs thanks to cost efficiency, surface smoothness, and FDA food-contact clearances. Yet growth moderates as brand owners specify lower-grammage liners to cut freight emissions, eroding tonnage even where square-meter demand rises. Polyethylene-coated kraft papers are gaining in chilled-food and outdoor labeling where moisture resistance outperforms uncoated grades. Filmic liners made from BO-PET and BOPP are expanding quickly in electronics, aerospace, and automotive laminates that cure at temperatures beyond the glass-transition point of cellulosic papers.

Alternative substrates inside the "Others" category are setting the pace: bi-axially oriented polyamide, PTFE-coated glass cloth, and micro-fibrillated cellulose composites deliver multi-functional properties such as anti-static release, thermal stability above 260 C, and repulpability. Adoption remains niche yet lifts average selling price because converters implement multi-pass coating lines and inline plasma treatments to anchor release agents. Glassine suppliers are responding with barrier-enhanced variations-bleached, metallized, or calcium-carbonate-filled-aimed at clean-label packaging. These iterative shifts ensure glassine stays relevant while ceding the fastest growth slices to engineered films.

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Silicone systems controlled 81.22% of the 2024 release liner market, supported by versatile cure chemistries, low surface energy, and abundant supply of base siloxanes. Platinum-catalyzed UV silicones shorten cure windows, enabling high-speed 1,000 m/min coating that sustains price competitiveness. The release liner market size for fluoropolymer-based agents is smaller yet advancing at 7.64% CAGR because perfluorinated chains deliver chemical inertness and ultra-low release force vital in high-temperature composite molds and aggressive adhesive tapes.

Regulatory pressure on PFAS chemicals is fostering a split: legacy fluoro-silicones for aerospace retain demand, while packaging and hygiene sectors shift toward acrylic or polyolefin release varnishes. Suppliers such as Hightower Products now market PFAS-free formulations customized by viscosity and anchorage resins, balancing clean release with recyclability. Silicone producers answer with controlled-migration grades that minimize siloxane transfer onto optical films and semiconductor wafers. Competitive advantage hinges on analytical capability to verify sub-ppm migration and accelerate customer qualification.

The Release Liner Market Report is Segmented by Substrate (Clay-Coated Kraft Paper, Filmic Liners, and More), Release Agent (Silicone, Fluoropolymer, and More), Application (Labels, Graphics, and More), End-Use Industry (Food and Beverage, Healthcare and Pharmaceuticals, and More), and Geography (Asia-Pacific, North America, Europe, South America, Middle East and Africa). The Market Forecasts are Provided in Terms of Value (USD).

Geography Analysis

Asia-Pacific dominated with 42.74% market share in 2024 and is projected to grow at a 7.56% CAGR through 2030, underpinned by the region's vertically integrated pulp-to-coating supply chain and expanding middle-class consumption. China accounts for the bulk of incremental tonnage as packaging converters ramp capacity near e-commerce fulfilment hubs, while Japan and South Korea specialize in high-precision liners for semiconductor fabs and battery cell assembly. Government incentives for renewable energy also lift demand for prepreg liners in wind-blade production.

North America preserves a sizeable installed base in aerospace, medical device, and quick-service restaurant packaging. The United States is the hub for FDA-cleared medical tape development, benefiting from clusters around Minnesota, Massachusetts, and California. Canada leverages abundant forest resources to promote FSC-certified glassine and clay-coated kraft, aligning with retailer sustainability mandates. Mexico's near-shoring boom encourages multinationals to co-locate RFID, label, and filmic coating facilities close to automotive and consumer-electronics plants; Avery Dennison's USD 100 million investment testifies to this momentum.

Europe remains the regulatory vanguard, driving circularity targets that reward suppliers able to certify post-consumer liner recycling rates. Germany spearheads industrial tape innovation linked to automotive lightweighting, whereas Italy and France capitalize on luxury packaging where small-batch, high-finish labels command premium liners. Nordic countries influence global material standards by mandating PFAS phase-outs and promoting bio-based alternatives. Eastern Europe serves as a cost-effective production corridor supplying the EU single market, though geopolitical tensions occasionally disrupt feedstock logistics.

List of Companies Covered in this Report:

3M / Ahlstrom / Avery Dennison Corporation / Dow / Eastman Chemical Company / Elkem ASA / Felix Schoeller / Gascogne Group / Laufenberg GmbH / LINTEC Corporation / Loparex / Mativ Holdings, Inc. / Mitsubishi Chemical Group Corporation. / Mondi / Polyplex / Sappi Ltd / SJA Film Technologies Ltd. / Techlan / The Griff Network / UPM /

Additional Benefits:

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

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

Table of Contents:

1 Introduction

1.1 Study Assumptions and Market Definition

1.2 Scope of the Study

2 Research Methodology

3 Executive Summary

4 Market Landscape

4.1 Market Overview

4.2 Market Drivers

4.2.1 Growing Demand for Clean-label Packaging in Food and Beverage

4.2.2 E-commerce Boom Accelerating Label Demand

4.2.3 Uptake of Premium Hygiene and Medical Tapes

4.2.4 Aerospace and Wind Prepregs Needing Specialty Liners

4.2.5 Electric Vehicles Battery Cell Electrode Tapes Adoption

4.3 Market Restraints

4.3.1 Release-liner Waste Disposal Challenges

4.3.2 Volatile Pulp and Silicone Raw-material Prices

4.3.3 Shift Toward Liner-less Labelling Systems

4.4 Value Chain Analysis

4.5 Porter's Five Forces

4.5.1 Bargaining Power of Suppliers

4.5.2 Bargaining Power of Buyers

4.5.3 Threat of New Entrants

4.5.4 Threat of Substitutes

4.5.5 Degree of Competition

5 Market Size and Growth Forecasts (Value)

5.1 By Substrate

5.1.1 Glassine / Super-calendered Paper

5.1.2 Polyethylene-coated Paper

5.1.3 Filmic Liners

5.1.4 Clay-coated Kraft Paper

5.1.5 Others (Poly-coated Biaxially Oriented Polyethylene Terephthalate (BO-PET) film, etc.)

5.2 By Release Agent

5.2.1 Silicone

5.2.2 Fluoropolymer

5.2.3 Non-silicone (Acrylic, Others)

5.3 By Application

5.3.1 Labels

5.3.2 Graphics

5.3.3 Tapes

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 5.3.4 Medical
- 5.3.5 Industrial
- 5.3.6 Other Applications (Hygiene Products, etc.)
- 5.4 By End-use Industry
- 5.4.1 Food and Beverage
- 5.4.2 Healthcare and Pharmaceuticals
- 5.4.3 Personal Care and Cosmetics
- 5.4.4 Automotive and Transportation
- 5.4.5 Electronics
- 5.4.6 Building and Construction
- 5.4.7 Other End-user Industries (Agriculture, etc.)

5.5 By Geography

- 5.5.1 Asia-Pacific
 - 5.5.1.1 China
 - 5.5.1.2 Japan
 - 5.5.1.3 India
 - 5.5.1.4 South Korea
 - 5.5.1.5 ASEAN Countries
 - 5.5.1.6 Rest of Asia-Pacific
- 5.5.2 North America
 - 5.5.2.1 United States
 - 5.5.2.2 Canada
 - 5.5.2.3 Mexico
- 5.5.3 Europe
 - 5.5.3.1 Germany
 - 5.5.3.2 United Kingdom
 - 5.5.3.3 France
 - 5.5.3.4 Italy
 - 5.5.3.5 Spain
 - 5.5.3.6 Russia
 - 5.5.3.7 NORDIC Countries
 - 5.5.3.8 Rest of Europe
- 5.5.4 South America
 - 5.5.4.1 Brazil
 - 5.5.4.2 Argentina
 - 5.5.4.3 Rest of South America
- 5.5.5 Middle East and Africa
 - 5.5.5.1 Saudi Arabia
 - 5.5.5.2 South Africa
 - 5.5.5.3 Rest of Middle East and Africa

6 Competitive Landscape

- 6.1 Market Concentration
- 6.2 Strategic Moves
- 6.3 Market Share(%) / Ranking Analysis
- 6.4 Company Profiles (includes Global level Overview, Market level overview, Core Segments, Financials as available, Strategic Information, Market Rank/Share for key companies, Products and Services, and Recent Developments)

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 6.4.1 3M
- 6.4.2 Ahlstrom
- 6.4.3 Avery Dennison Corporation
- 6.4.4 Dow
- 6.4.5 Eastman Chemical Company
- 6.4.6 Elkem ASA
- 6.4.7 Felix Schoeller
- 6.4.8 Gascogne Group
- 6.4.9 Laufenberg GmbH
- 6.4.10 LINTEC Corporation
- 6.4.11 Loparex
- 6.4.12 Mativ Holdings, Inc.
- 6.4.13 Mitsubishi Chemical Group Corporation.
- 6.4.14 Mondi
- 6.4.15 Polyplex
- 6.4.16 Sappi Ltd
- 6.4.17 SJA Film Technologies Ltd.
- 6.4.18 Techlan
- 6.4.19 The Griff Network
- 6.4.20 UPM

7 Market Opportunities and Future Outlook

7.1 White-space and Unmet-need Assessment

7.2 Incorporation of Nano-coatings into Release Liners for Enhanced Release Properties

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Release Liners - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-07-01 | 120 pages | Mordor Intelligence

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User License	\$4750.00
	Team License (1-7 Users)	\$5250.00
	Site License	\$6500.00
	Corporate License	\$8750.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-03-02"/>
		Signature	

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

