



**AWA**

Alexander Watson Associates

Global AWAreness™ Report

# The Linerless Label Market 2013

A market overview of current and future  
opportunities

**AWA Alexander Watson Associates**  
Koningin Wilhelminaplein 13  
2.10.03 (Tower 2, Floor 10, Suite 3)  
PO Box 69035  
1060 CA Amsterdam  
The Netherlands

Tel: +31 20 676 2069  
Fax: +31 20 820 8633  
Email: [reports@awa-bv.com](mailto:reports@awa-bv.com)  
Web: [www.awa-bv.com](http://www.awa-bv.com)

**AWA North American Office**  
910 N Lakeshore Drive  
# 2415  
Chicago, IL 60611  
USA

Tel: +1 312 943 4091  
Email: [reports@awa-bv.com](mailto:reports@awa-bv.com)  
Web: [www.awa-bv.com](http://www.awa-bv.com)

AWA Alexander Watson Associates have published several reports on the labelstock market. In those studies, as well as in our reports on the release liner market, we have briefly discussed linerless labeling. In 2009 we published our first report detailing linerless labeling. This is AWA's second report that focuses entirely on the linerless label technology and markets.

This study has been prepared to deliver an updated, independent, wide-ranging assessment of the market for pressure-sensitive labeling and product decoration applications that do not utilize a release liner – linerless labels. This technology is of particular interest today, in two contexts. First, the entire value chain is continually challenged with demands to decrease costs of the finished decorated product or package. Removing the release liner in a pressure-sensitive laminate could make significant cost savings. Additionally, today's increasing interest in sustainability and recyclability certainly favors a linerless label solution.

The report will include the following:

- Historical Perspective
- Market Segmentation & Applications
- Market Demand Overview
- Market Drivers & Trends
- Demand Outlook & Opportunities
- Technology Review

Research for this study is based on secondary research, and in-depth telephone interviews.

The scope of this report is global, although the main focus is on North America and Europe.

## **PUBLICATION AND COST**

The Linerless Label Market 2013 was published in March 2013.

The price of a hard copy or a pdf is €995/US\$1,450. Additional copies (whether hard copy or pdf) are available at €200/US\$250 each. A corporate pdf license is available for €1,490/US\$2,180.

The cost for handling & processing is € 60/US\$ 85.

## **AWA ALEXANDER WATSON ASSOCIATES**

AWA is an international publishing and market research company whose specialization and expertise in the labeling market extends over many years and provides a unique database of marketing information. AWA also provides consultancy services and the possibility for tailored research.

## **AWA CONFERENCES & EVENTS**

AWA Conferences & Events was established to expand AWA's platform of expert services for the specialty paper, film, packaging, coating, and converting industry and regularly organizes events in these markets, which are particularly valued for the industry networking opportunities they provide, as well as for their in-depth content.

Visit the events section of our website for an overview of events.

## TABLE OF CONTENTS

### 1. INTRODUCTION

#### 1.1 INTRODUCTION

#### 2.1 SOURCES OF INFORMATION & METHODOLOGY

### 2. EXECUTIVE SUMMARY

### 3. LABELING MARKET OVERVIEW

#### 3.1 PRESSURE-SENSITIVE LABEL MARKET OVERVIEW

### 4. LINERLESS LABEL MARKET

#### 4.1 HISTORICAL CONTEXT: THE EVOLUTION OF LINERLESS LABELS

#### 4.2 LINERLESS LABELS: AN OVERVIEW

#### 4.3 ADVANTAGES AND DISADVANTAGES OF LINERLESS LABELS

#### 4.4 THE LINERLESS LABEL VALUE CHAIN

#### 4.5 MARKET SEGMENTATION AND APPLICATIONS

### 5. MARKET DEMAND OVERVIEW

### 6. MARKET DRIVERS AND TRENDS

### 7. DEMAND OUTLOOK AND OPPORTUNITIES

### 8. LINERLESS TECHNOLOGY REVIEW

#### 8.1 PRE-COATED LINERLESS LABEL STOCK

#### 8.2 PREPRINTING PRIOR TO SILICONE AND ADHESIVE COATING

#### 8.3 ADHESIVE COATING

#### 8.4 RELEASE COATING

#### 8.5 DIECUTTING

#### 8.6 APPLICATION SPEEDS

#### 8.7 SOLUTIONS PROVIDERS FOR LINERLESS LABEL SYSTEMS

### 9. APPENDIX: CONTACT DETAILS FOR TECHNOLOGY SUPPLIERS

## LIST OF EXHIBITS

EXHIBIT 3.1: WORLD DEMAND FOR LABELS 2012

EXHIBIT 3.2: GLOBAL LABEL MARKET BY LABELING FORMAT, 2012

EXHIBIT 3.3: TYPICAL PRESSURE-SENSITIVE LABEL CONSTRUCTION

EXHIBIT 3.4: LINERLESS SHARE OF THE TOTAL PRESSURE-SENSITIVE LABEL MARKET

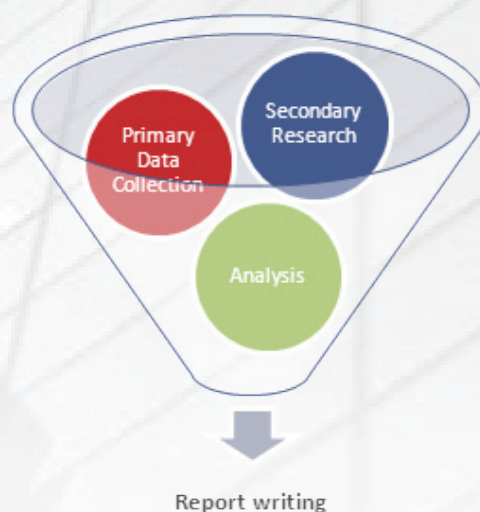
EXHIBIT 3.5: TYPICAL COST BREAKDOWN OF PRESSURE-SENSITIVE LAMINATES

EXHIBIT 4.1: LINERLESS VALUE CHAIN

EXHIBIT 4.2: LINERLESS APPLICATIONS TODAY

EXHIBIT 5.1: TYPICAL COST BREAKDOWN OF PRESSURE-SENSITIVE LABEL LAMINATES

EXHIBIT 6.2: LINERLESS LABEL APPLICATIONS TODAY



# Order Form The Linerless Label Market 2013

Please complete this form and fax it to AWA Alexander Watson Associates at +31 20 820 8633

Please send me:

COPY	€995/US\$1,450	<input type="checkbox"/> PDF	<input type="checkbox"/> Hard Copy
ADDITIONAL COPY	€200/US\$250 EACH	<input type="checkbox"/> PDF	<input type="checkbox"/> Hard Copy
CORPORATE SITE PDF LICENSE	€1,490/US\$2,180	<input type="checkbox"/> PDF	
HANDLING & PROCESSING CHARGE	€60/US\$85	<input type="checkbox"/> Euros	<input type="checkbox"/> US Dollars

Name	<input type="text"/>
Job Title	<input type="text"/>
Company	<input type="text"/>
Address	<input type="text"/>
	<input type="text"/>
Postcode, City	<input type="text"/>
Country	<input type="text"/>
VAT # (EU only)	<input type="text"/>
Phone	<input type="text"/>
Fax	<input type="text"/>
Email	<input type="text"/>
Signature	<input type="text"/>
Date	<input type="text"/>
Remarks	<input type="text"/>

☐  
☐  
☐  
☐

Please send an invoice to the address above

Payment is enclosed

Payment has been transferred to bank account number ING 66 40 32 923,

Iban: NL 16 INGB 0664 0329 23, Swift (BIC): INGBNL2A

Payment will be made by credit card (payments by credit card are subject to a 7% surcharge)

<input type="checkbox"/> Amex	<input type="checkbox"/> Eurocard	<input type="checkbox"/> Visa
-------------------------------	-----------------------------------	-------------------------------

Card Number	<input type="text"/>
<b>CVC Code</b>	<input type="text"/>
Expiry Date	<input type="text"/>
Name of Cardholder	<input type="text"/>
Address of Cardholder	<input type="text"/>
Signature	<input type="text"/>