

UK Linerless Market Report 2025

Executive summary

- Demand led by logistics, QSR, retail, healthcare
- EPR and PPT increase packaging data requirements
- OEM ecosystems influence media approvals

Regulatory stats

- 75.2% UK packaging waste recycled (2024 provisional)
- PPT rate: GBP 223.69 per tonne from 1 Apr 2025
- EPR threshold: GBP 1m turnover and 25+ tonnes packaging
- PPWR entered into force 11 Feb 2025; apply +18 months
- PPWR target: 15% less packaging waste per person by 2040

Market sizing and adoption signals

- Linerless labels market: USD 2.15B (2025) to 2.66B (2030)
- Linerless labels market: USD 2.0B (2024) to 3.2B (2035)
- Thermal paper market: USD 4.08B (2024) to 5.22B (2030)
- Thermal paper market: USD 4.51B (2024) to 6.78B (2033)
- UK parcel volumes: 3.9B items in 2023-24
- UK internet sales share: 27.2% in 2024

Key actions

- Map label formats and materials
- Validate linerless printer compatibility
- Pilot one station and measure roll changes