

Sustainable Labels Market Forecasts to 2034 – Global Analysis By Label Type (Pressure-Sensitive Labels, Shrink Sleeve Labels, Stretch Labels, Wet Glue Labels, and Linerless Labels), Material Type, Adhesive Type, Application, End-Use Industry, Distribution Channel and By Geography

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Abstracts

According to Statistics MRC, the Global Sustainable Labels Market is accounted for \$1.9 billion in 2026 and is expected to reach \$4.1 billion by 2034 growing at a CAGR of 9.6% during the forecast period. Sustainable labels are environmentally responsible adhesive labels designed to minimize ecological impact through reduced material consumption, renewable resources, or end-of-life biodegradability and recyclability. These labels serve the same functional purposes as conventional labels including product identification, branding, and regulatory compliance, while offering reduced carbon footprints and alignment with corporate sustainability goals. The market encompasses various application formats across food and beverage, personal care, pharmaceutical, and logistics sectors, as brand owners increasingly prioritize packaging sustainability in response to consumer demand and regulatory pressures worldwide.

Market Dynamics:

Driver:

Stringent government regulations on plastic waste

Regulatory frameworks across multiple regions are mandating reduced plastic consumption and improved packaging recyclability, directly benefiting sustainable label

adoption. The European Union's Single-Use Plastics Directive and similar legislation in North America and Asia impose restrictions on non-recyclable packaging components, compelling brand owners to reconsider conventional label materials. Extended Producer Responsibility (EPR) programs hold manufacturers financially accountable for end-of-life packaging management, creating economic incentives for sustainable alternatives. These regulatory pressures translate into binding targets that cannot be addressed through voluntary initiatives alone, making sustainable label adoption a compliance necessity rather than a discretionary brand choice for companies operating in regulated markets.

Restraint:

Higher production costs compared to conventional labels

Sustainable label materials typically command premium pricing over traditional petroleum-based alternatives, creating adoption barriers for price-sensitive industries and smaller brand owners. Compostable films, bio-based plastics, and recycled paper stocks require specialized manufacturing processes and smaller production volumes, limiting economies of scale. These cost differentials are particularly challenging in competitive retail categories where packaging represents a significant portion of product costs and margins are already compressed. For multinational corporations, converting global product lines to sustainable labels requires substantial capital investment across multiple facilities, while passing increased costs to consumers risks losing market share to less expensive conventional alternatives.

Opportunity:

Advancements in adhesive technologies for challenging applications

Emerging adhesive formulations are overcoming historical performance limitations that prevented sustainable label adoption in demanding environments. Water-based and bio-derived adhesives now offer comparable bonding strength, temperature resistance, and moisture stability to traditional solvent-based alternatives, enabling sustainable labeling for refrigerated goods, frozen products, and industrial applications. Removable and repositionable sustainable adhesives are expanding into retail and promotional labeling where temporary application was previously dominated by conventional materials. These technological improvements reduce the performance compromise previously associated with sustainable labels, opening new application segments and accelerating adoption across categories where functional requirements previously mandated

conventional materials.

Threat:

Inconsistent recycling infrastructure across regions

Fragmented global recycling systems create confusion about proper label disposal and undermine sustainability claims made by manufacturers. Labels designed for compostability require industrial composting facilities that remain unavailable in many regions, while recyclable synthetic labels depend on local recycling capabilities that vary dramatically between municipalities. This infrastructure mismatch risks consumer backlash when labeled products cannot be properly processed as intended, potentially leading to accusations of misleading environmental marketing. For multinational brands operating across jurisdictions with differing waste management capabilities, achieving consistent end-of-life outcomes for sustainable labels becomes operationally complex and increasingly difficult to verify and communicate to environmentally conscious consumers.

Covid-19 Impact:

The COVID-19 pandemic produced mixed effects on the sustainable labels market, simultaneously accelerating and decelerating adoption across different segments. Heightened focus on hygiene initially increased demand for packaged goods with conventional plastic labels perceived as more sanitary than alternatives. However, the pandemic also intensified consumer awareness of environmental issues as lockdowns provided reflection time and reduced visible pollution from travel and industry. Supply chain disruptions created opportunities for local sustainable label producers while exposing vulnerabilities in global material sourcing. The post-pandemic landscape reflects sustained commitment to sustainability among major brand owners, with many reaffirming or accelerating environmental targets despite short-term operational challenges.

The Pressure-Sensitive Labels segment is expected to be the largest during the forecast period

The Pressure-Sensitive Labels segment is expected to account for the largest market share during the forecast period, driven by their versatility, ease of application, and widespread adoption across diverse end-use industries. These labels require no heat, water, or solvent activation for bonding, making them compatible with high-speed

automated labeling systems preferred by large-scale food, beverage, and personal care manufacturers. The segment's dominance is reinforced by continuous innovation in sustainable pressure-sensitive adhesives and release liners, including linerless options and recycled-content backing materials. Their ability to conform to curved containers, withstand temperature variations, and accommodate various printing technologies ensures pressure-sensitive labels remain the preferred choice for brand owners transitioning to sustainable packaging solutions.

The Compostable Materials segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the Compostable Materials segment is predicted to witness the highest growth rate, reflecting increasing consumer preference for end-of-life biodegradability and regulatory support for organics recycling pathways. These labels are manufactured from renewable resources such as polylactic acid (PLA), cellulose, and other plant-based polymers that break down under industrial composting conditions into non-toxic components. The segment benefits from parallel growth in compostable packaging across food service and fresh produce categories, where consistent material streams simplify waste management. As municipalities expand industrial composting infrastructure and certification standards become more widely recognized, compostable labels are transitioning from niche applications to mainstream adoption across grocery, food service, and organic product categories.

Region with largest share:

During the forecast period, the Europe region is expected to hold the largest market share, driven by the world's most progressive regulatory framework for packaging sustainability and circular economy objectives. The European Union's ambitious targets for recycled content, compostability, and reduced packaging waste create binding requirements that compel brand owners to adopt sustainable labeling solutions. Consumer environmental consciousness is exceptionally high across Western European markets, with sustainability certifications directly influencing purchasing decisions. The region's well-developed waste management infrastructure, including widespread industrial composting and advanced recycling facilities, enables practical end-of-life processing for sustainable labels. These factors collectively establish Europe as both the largest market and a policy leader shaping global sustainable label development.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR, fueled by rapid industrialization, expanding consumer goods markets, and increasing environmental awareness across manufacturing powerhouses. Countries including China, India, Japan, and South Korea are implementing stricter packaging waste regulations as urban waste management challenges intensify with population growth and rising consumption. Multinational brand owners are extending their global sustainability commitments to Asia Pacific operations, driving demand for consistent sustainable labeling across regional facilities. Growing domestic brands are adopting sustainable labels as competitive differentiators in increasingly crowded consumer markets. Rapidly improving waste management infrastructure and recycling capabilities across major Asian economies further accelerate regional market expansion throughout the forecast period.

Key players in the market

Some of the key players in Sustainable Labels Market include Avery Dennison Corporation, CCL Industries Inc., UPM-Kymmene Corporation, 3M Company, Constantia Flexibles Group GmbH, Multi-Color Corporation, Coveris Holdings SA, Huhtamaki Oyj, LINTEC Corporation, Sato Holdings Corporation, Brady Corporation, R.R. Donnelley & Sons Company, Toppan Holdings Inc., Fuji Seal International Inc. and WS Packaging Group Inc.

Key Developments:

In March 2026, Avery Dennison published its first Environmental Product Declaration (EPD) report for Solar Control Interior Window Films, marking a significant step in transparent life-cycle assessment (LCA) reporting for its graphics and performance films division.

In March 2026, CCL Industries signed a binding agreement to acquire Sleever International for approximately \$151 million. The acquisition aims to combine their respective sleeve product lines, which saw combined sales of \$700 million in 2025, specifically focusing on expanding sustainable shrink sleeve technologies.

In February 2026, UPM Raflatac launched a new series of 'Premium Performance' wine and spirits labels in collaboration with design agency Denomination, focusing on materials that maintain aesthetic quality while being fully compatible with glass recycling streams.

Label Types Covered:

Pressure-Sensitive Labels

Shrink Sleeve Labels

Stretch Labels

Wet Glue Labels

Linerless Labels

Material Types Covered:

Paper-based Labels

Recycled Paper Labels

Bio-based Plastics

Compostable Materials

Recyclable Synthetic Materials

Adhesive Types Covered:

Water-based Adhesives

Solvent-based Adhesives

Hot Melt Adhesives

UV-curable Adhesives

Applications Covered:

Product Identification

Branding & Marketing

Regulatory Compliance

Track & Trace

Security & Anti-counterfeit

End-Use Industries Covered:

Food & Beverages

Pharmaceuticals & Healthcare

Personal Care & Cosmetics

Household & Consumer Goods

Retail & E-commerce

Industrial & Chemicals

Logistics & Transportation

Distribution Channels Covered:

Direct Sales (B2B)

Distributors & Wholesalers

Online Channels

Regions Covered:

North America

United States

Canada

Mexico

Europe

United Kingdom

Germany

France

Italy

Spain

Netherlands

Belgium

Sweden

Switzerland

Poland

Rest of Europe

Asia Pacific

China

Japan

India

South Korea

Australia

Indonesia

Thailand

Malaysia

Singapore

Vietnam

Rest of Asia Pacific

South America

Brazil

Argentina

Colombia

Chile

Peru

Rest of South America

Rest of the World (RoW)

Middle East

Saudi Arabia

United Arab Emirates

Qatar

Israel

Rest of Middle East

Africa

South Africa

Egypt

Morocco

Rest of Africa

What our report offers:

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2023, 2024, 2025, 2026, 2027, 2028, 2030, 2032 and 2034
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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