

SCK Release Liner Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Material Type (Plastic-based, Paper-based), By Liner Type (One-sided release liner, Double-sided release liner), By Substrate Type (Silicone-coated SCK liners, Non-silicone coated SCK liners), By End-Use Industry (Packaging, Healthcare, Consumer goods, Industrial manufacturing, Retail, Automotive, Others), By Region & Competition, 2021-2031F

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Abstracts

The global market for Super Calendered Kraft (SCK) release liners is projected to expand robustly, increasing from USD 4.71 billion in 2025 to USD 6.94 billion by 2031, demonstrating a compound annual growth rate (CAGR) of 6.67%. SCK release liners are dense, highly refined paper substrates known for their exceptional smoothness and consistent thickness, functioning primarily as silicone-coated carriers for pressure-sensitive adhesives used in labeling and industrial tape applications. This market's growth is primarily driven by the expanding global e-commerce sector, which requires dependable logistics labeling, and an increasing industry shift towards paper-based materials over plastic films to meet sustainability goals. These factors collectively fuel a consistent demand for high-performance liners capable of precise die-cutting and rapid dispensing. However, a significant obstacle to market expansion is the limited recycling infrastructure for silicone-coated paper waste, leading to increased disposal expenses and environmental concerns. The scale of this problem is considerable, given the large quantities of material produced annually. For instance, TLMI estimated that the annual production of paper and filmic release liners reached nearly 600,000 tons in 2025, underscoring the urgent need for efficient circular economy strategies to manage this

substantial volume effectively.

Market Driver

The market for SCK release liners is significantly propelled by the increasing demand from e-commerce and logistics packaging, which requires vast quantities of variable information labels for tracking and identification. SCK liners are crucial in this segment due to their excellent caliper consistency and resilience, performing reliably during high-speed thermal transfer printing and automated application. As rapid delivery networks become more prevalent for both consumers and businesses, the substantial volume of parcel shipping creates a corresponding need for pressure-sensitive shipping labels, directly boosting the use of paper-based liners. This trend is supported by data from Pitney Bowes' June 2025 'Parcel Shipping Index', which reported that United States parcel volume reached 22.4 billion shipments in 2024, a 3.4% increase from the previous year. This escalating shipping activity mandates that manufacturers enhance the production of durable SCK liners to ensure efficient label dispensing in busy distribution centers. Concurrently, a growing preference for sustainable and recyclable paper liners is transforming industry benchmarks, as brands aim to align their packaging components with circular economy objectives. When responsibly sourced, SCK liners provide a clear environmental benefit over filmic alternatives, addressing strong regulatory pressures to reduce packaging waste. Manufacturers are responding by improving the chain-of-custody certification for their substrates to substantiate environmental claims. For example, Mondi stated in a September 2024 corporate press release that over 95% of its release liners and extrusion solutions are now sourced from certified base paper, highlighting this industry-wide shift towards transparent sourcing. This change is unfolding amid a broader market recovery, with FINAT reporting in July 2025 that European labelstock demand recovered by 15% in 2024 after earlier downturns. Consequently, certified SCK liners are increasingly becoming a standard requirement for converters seeking to fulfill both performance and ecological standards.

Market Challenge

A significant obstacle hindering the expansion of the Global SCK Release Liner Market is the absence of a pervasive recycling infrastructure for silicone-coated paper waste. Unlike conventional paper goods, SCK liners possess a silicone coating that contaminates standard paper recycling channels, thereby requiring specialized de-siliconization processes and distinct collection systems. Given the rarity and often remote locations of these specific recycling facilities, end-users face considerable operational difficulties and elevated disposal expenses, frequently leading to landfilling

or incineration. This situation directly contradicts the sustainability directives of major brand owners, who are increasingly examining their supply chains for non-recyclable waste to achieve stringent environmental objectives. As a result, this infrastructural deficit constrains market penetration, making SCK liners less appealing compared to alternative materials that have established recovery routes. The difficulty in easily incorporating this material into a circular economy discourages its high-volume adoption in environmentally conscious industries, effectively suppressing demand despite the substrate's inherent performance advantages. The volume of unrecovered material is substantial; for instance, CELAB Europe reported that in 2024, the European region alone produced nearly 500,000 tons of paper release liner waste, with most of it having limited end-of-life options due to the scarcity of accessible recycling solutions. This considerable amount of unmanaged waste represents a critical bottleneck that continues to impede the wider growth of the SCK liner market.

Market Trends

Manufacturers are progressively incorporating post-consumer recycled (PCR) waste and ethically sourced fibers into SCK liners. This strategy aims to achieve circular economy objectives without sacrificing mechanical strength. Such a transition diminishes reliance on virgin wood pulp while preserving the exact caliper necessary for efficient high-speed label dispensing. Leading producers are confirming the practicality of these materials in various industrial applications; for example, Ahlstrom's March 2025 'Sustainability Report 2024' highlighted the successful introduction of a new generation of release papers containing up to 30% recycled fiber, proving that sustainability goals can be met alongside stringent performance requirements for pressure-sensitive adhesive laminates. Furthermore, industry participants are developing specialized collection and repulping systems that enable the recovery of used SCK liners from end-users, recycling them into high-quality pulp or new products. These initiatives tackle long-standing disposal issues by establishing an operational reverse logistics infrastructure that reroutes silicone-coated waste away from landfills. The efficacy of these circular approaches is becoming quantifiable; according to Fedrigoni's May 2025 '2024 Sustainability Statement', the company achieved an impressive 92.4% waste recovery rate in 2024, a significant accomplishment largely facilitated by its dedicated Re-Play collection service, which upcycles recovered liner material into premium labeling solutions.

Key Market Players

Ahlstrom Oyj

Loparex LLC

UPM-Kymmene Corporation

Mondi Plc

LINTEC Corporation

Nordic Paper Holding AB

Delfort Group

Xinfeng Group

Siliconature S.p.A.

Laufenberg GmbH

Report Scope

In this report, the Global SCK Release Liner Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

SCK Release Liner Market, By Material Type

Plastic-based

Paper-based

SCK Release Liner Market, By Liner Type

One-sided release liner

Double-sided release liner

SCK Release Liner Market, By Substrate Type

Silicone-coated SCK liners

Non-silicone coated SCK liners

SCK Release Liner Market, By End-Use Industry

Packaging

Healthcare

Consumer goods

Industrial manufacturing

Retail

Automotive

Others

SCK Release Liner Market, By Region

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global SCK Release Liner Market.

Available Customizations:

SCK Release Liner Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Materi...

Global SCK Release Liner Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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