

# **Thermal Paper Market – Global Industry Size, Share, Trends, Opportunity, & Forecast, Segmented By Application (POS, Tags & Label, Lottery & Gaming, Others), By Region, Competition, 2019-2029F**

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## **Abstracts**

Global Thermal Paper Market was valued at USD 4.02 billion in 2023 and is anticipated to project steady growth in the forecast period with a CAGR of 4.30% through 2029. The global thermal paper market is a dynamic and evolving industry characterized by the widespread use of a specialized type of paper coated with a heat-sensitive layer, which darkens when exposed to heat. This technology is commonly employed in various applications, including point-of-sale (POS) systems, labels, tickets, and receipts. The global thermal paper market has experienced substantial growth in recent years and is expected to continue expanding. The market size is influenced by factors such as the growth of retail and hospitality industries, the rise of e-commerce, the adoption of mobile POS systems, and increased regulatory compliance requirements.

### **Key Market Drivers**

#### **Increasing Retail and Hospitality Industry**

The increasing retail and hospitality industry is a crucial market driver for the global thermal paper market. This sector plays a pivotal role in the demand for thermal paper due to its widespread use in various applications within these industries. The primary areas of application for thermal paper are in the printing of receipts from POS systems. Retail stores, restaurants, hotels, and other businesses in the hospitality sector rely heavily on these systems to complete transactions and generate customer receipts. As the retail and hospitality industry expands, the demand for thermal paper rolls used in these POS printers increases in tandem.

Despite the rise of e-commerce, physical retail outlets are still a significant part of the retail landscape. The expansion of retail chains, grocery stores, and specialty shops means more cash registers and POS terminals are in use. Thermal paper is the preferred choice for receipt printing due to its cost-efficiency and convenience. The proliferation of these outlets directly contributes to the demand for thermal paper products. The restaurant and food service sector is a significant consumer of thermal paper for various reasons. Thermal paper is used in restaurants to print customer receipts, order tickets in the kitchen, and even for take-out and delivery orders. The continuous growth of the restaurant industry, driven by changing consumer preferences and the rise of food delivery services, leads to a sustained need for thermal paper.

Thermal paper is also used in the retail and hospitality industry for labeling purposes. This includes price tags, shelf labels, and promotional tags. In supermarkets, for instance, perishable goods are often labeled with thermal printed price tags that include barcodes for easy scanning. As businesses continually update prices, promotions, and product information, there is a consistent demand for thermal paper labels. The hospitality industry encompasses hotels, resorts, and tourism-related services. With the growth of the tourism sector in various regions, there is a surge in the use of thermal paper for printing hotel bills, invoices, and other guest-related documents. Additionally, thermal paper is used in the transportation sector for printing boarding passes and baggage tags.

### Rising E-commerce Transactions

The surge in e-commerce transactions is a significant market driver for the global thermal paper market. As the e-commerce industry continues to experience substantial growth, the demand for thermal paper for various applications has risen. In the e-commerce sector, thermal paper is frequently used for printing shipping labels and packing slips. These labels provide essential information for logistics and delivery companies, enabling them to process and deliver packages efficiently. The growth of e-commerce translates into a higher demand for thermal paper rolls to support the shipping and fulfillment processes. E-commerce businesses generate order invoices and receipts for every transaction. Thermal paper is the preferred choice for this purpose due to its cost-effectiveness and ease of use. As the number of online orders continues to climb, so does the need for thermal paper products to print these transaction-related documents.

The e-commerce industry also involves a considerable number of returns and

exchanges. Thermal paper is used to generate return labels, return receipts, and exchange documents. This additional layer of documentation increases the demand for thermal paper. E-commerce businesses often rely on automated systems to streamline their operations. This includes automated packing stations and label printing systems. Thermal printers are an ideal choice for these automated systems due to their speed and efficiency. As e-commerce companies invest in these technologies to handle increased order volumes, they also invest in thermal paper for these printers.

E-commerce companies require efficient inventory management and warehousing solutions. Thermal paper is used for various applications in these areas, such as shelf labels, inventory tracking, and quality control checks. The growth of e-commerce necessitates robust inventory and warehousing practices, driving the need for thermal paper. The establishment of e-commerce fulfillment centers is a direct result of the growth in online shopping. These centers are responsible for processing and dispatching orders quickly and accurately. Thermal paper is used for printing labels, order invoices, and packing slips within these fulfillment centers, contributing to its increased consumption.

### Increased Adoption of Mobile POS Systems

The increased adoption of mobile Point of Sale (POS) systems is a significant market driver for the global thermal paper market. Mobile POS systems have gained popularity in various industries, including retail, hospitality, and food services, as they offer convenience, mobility, and cost-efficiency. These systems rely on thermal printers that require thermal paper for receipt printing, making them a key driver for the thermal paper market. Mobile POS systems are favored for their portability and convenience. Businesses such as food trucks, pop-up stores, and outdoor events benefit from the flexibility offered by mobile POS devices. These systems are equipped with compact thermal printers that produce receipts on the spot. As more businesses recognize the advantages of mobility, they invest in mobile POS solutions, driving up the demand for thermal paper.

Small and medium-sized businesses, including cafes, boutiques, and local restaurants, are increasingly adopting mobile POS systems to enhance their sales processes. These businesses often have limited counter space and can benefit from the space-saving design of mobile POS terminals. The affordability and accessibility of mobile POS systems make them particularly attractive to SMBs, leading to a growing demand for thermal paper rolls.

The food services industry, including food trucks, coffee shops, and quick-service restaurants, has seen substantial growth in mobile POS adoption. Mobile POS systems enable faster order processing and improved customer service. Thermal paper is crucial in this sector for printing order receipts, kitchen tickets, and customer receipts. As the food services industry expands, so does the demand for thermal paper. Mobile POS systems are prevalent at events, exhibitions, and pop-up retail locations. They are used for ticket sales, merchandise transactions, and more. These temporary setups rely on thermal paper for printing receipts, tickets, and other documents, contributing to spikes in thermal paper consumption during event-driven periods. Mobile POS systems allow businesses to engage with customers more effectively. Employees can move around the store or restaurant, taking orders, processing payments, and providing a more personalized experience. This enhanced customer engagement is driving the adoption of mobile POS systems, which, in turn, increases the demand for thermal paper.

### Government Regulations and Compliance

Government regulations and compliance play a significant role as market drivers for the global thermal paper market. Various industries are subject to strict regulations for labeling, record-keeping, and the quality of printed materials, and thermal paper is often used to meet these requirements. The healthcare and pharmaceutical sectors are highly regulated, and they require accurate, durable, and secure record-keeping. Thermal paper is used for printing patient wristbands, prescription labels, and patient information. Regulatory agencies, such as the FDA in the United States and the European Medicines Agency (EMA) in Europe, have stringent requirements for labeling, traceability, and data retention. Thermal paper must meet these standards, ensuring the growth of the thermal paper market in this sector.

The food industry and retail sector face strict labeling requirements, including ingredients, nutritional information, and expiration dates. Thermal paper is often used for printing price tags, shelf labels, and labels on pre-packaged foods. Compliance with food safety and labeling regulations is crucial, making thermal paper a key component in these industries.

In the transportation and logistics sector, thermal paper is used for printing shipping labels, packing lists, and invoices. International shipping requires customs documentation and compliance with trade regulations, necessitating the use of high-quality thermal paper. The transportation and logistics industry's adherence to trade and shipping regulations directly drives the demand for thermal paper. In various industries, including legal, financial services, and education, there are regulations that require

businesses to maintain records for a specified period. Thermal paper, when properly manufactured, can ensure long-term readability and durability, making it suitable for these industries. Compliance with record-keeping regulations fosters the demand for thermal paper used in archiving. Regulatory agencies, including the Environmental Protection Agency (EPA), often require businesses to use thermal paper that is free from harmful chemicals and substances. The production of eco-friendly thermal paper aligns with environmental and health regulations, offering a more sustainable option to businesses while adhering to government-mandated guidelines.

## Key Market Challenges

### Environmental Concerns and Sustainability Challenges

Traditional thermal paper relies on a chemical coating containing bisphenol-A (BPA) or bisphenol-S (BPS), which raises environmental and health concerns. BPA and BPS are known endocrine disruptors. The negative impact of these chemicals on the environment and human health has led to increasing regulations in various regions to reduce or eliminate their use. As a result, thermal paper manufacturers are under pressure to develop alternative coatings, which may be costlier and less readily available.

Thermal paper is difficult to recycle due to the presence of the thermal coating. This has raised concerns about waste generation and disposal. As environmental consciousness grows, there is a push towards sustainable practices, including the reduction of waste. Manufacturers are exploring options for more sustainable thermal paper, such as those with recyclable or biodegradable coatings, but these options may come with higher production costs. The production process for thermal paper involves high energy consumption, particularly in the thermal coating application. In an era where energy efficiency and reducing carbon footprints are paramount, the high energy consumption associated with thermal paper manufacturing may be a disadvantage in comparison to more sustainable paper production methods.

### Digital Alternatives and Paperless Trends

The rise of digital alternatives, such as digital receipts and electronic invoicing, poses a challenge to the thermal paper market. Many businesses are shifting towards digital receipt options to reduce costs and improve customer engagement. This transition can directly impact the demand for traditional thermal paper receipts.

Various organizations and governments are promoting paperless initiatives to reduce paper consumption and promote digital documentation. These efforts can affect the usage of thermal paper in industries such as healthcare, government, and finance, where paperless solutions are being actively adopted.

### Competition and Price Sensitivity

The thermal paper market is sensitive to changes in the prices of raw materials, particularly chemicals used in the thermal coating. Fluctuations in these costs can affect the pricing of thermal paper, potentially making it less cost-competitive compared to other paper types.

As businesses seek cost-effective alternatives to traditional thermal paper, competition from alternative receipt and label solutions, such as inkjet printing, impact printing, and non-thermal coated paper, becomes a challenge. These alternatives may offer lower costs, better durability, or environmental advantages, and they are increasingly considered by businesses. Private label brands and manufacturers have entered the thermal paper market, intensifying competition. The presence of multiple suppliers and private labels can put pressure on established thermal paper manufacturers to maintain their market share and price competitiveness.

### Key Market Trends

#### Transition to Eco-Friendly and BPA-Free Thermal Paper:

One of the prominent trends in the thermal paper market is the shift towards more sustainable and eco-friendly products. Traditional thermal paper coatings contain chemicals like bisphenol-A (BPA) or bisphenol-S (BPS), which have raised environmental and health concerns. Regulatory authorities and consumers alike are advocating for BPA-free alternatives. Manufacturers are responding by developing eco-friendly thermal paper products with coatings that are free from harmful chemicals. Another aspect of this trend is the development of thermal paper that is easier to recycle or biodegrade. This addresses concerns about waste generation and the environmental impact of traditional thermal paper. These new products are designed to meet the growing demand for more sustainable materials, particularly in industries with a strong focus on sustainability, such as retail and food services. Thermal paper manufacturers are increasingly seeking certifications such as the Forest Stewardship Council (FSC) and other eco-labels to demonstrate their commitment to sustainable practices. This trend aligns with the broader global shift toward sustainable and



environmentally responsible production processes.

### Digital Receipts and Paperless Initiatives

The prevalence of digital technology is leading to a growing trend of digital receipts and documentation. Many businesses and retailers are adopting digital alternatives, such as e-receipts and electronic invoicing, to reduce paper consumption, lower costs, and streamline customer engagement. This trend is driven by the convenience and efficiency of digital receipts and is impacting the demand for traditional thermal paper receipts. Various industries and government agencies are promoting paperless initiatives to reduce the use of paper and encourage the transition to digital documentation. This is affecting the demand for thermal paper, particularly in sectors like healthcare, finance, and government, where paperless solutions are becoming more widely adopted.

### Enhanced Durability and Specialty Applications

Thermal paper manufacturers are continuously working to enhance the durability of their products. This includes developing thermal paper that can withstand harsh environmental conditions, such as moisture, heat, and UV exposure. This trend is particularly important for industries like logistics, transportation, and warehousing where documents must remain legible under challenging circumstances. Security is a growing concern, especially in industries like pharmaceuticals, automotive, and electronics. Thermal paper is being designed with advanced security features, including tamper-evident coatings and anti-counterfeiting measures. These security enhancements are necessary to protect against counterfeit products and to ensure the authenticity of documents. The versatility of thermal paper has led to its use in various specialty applications. This includes thermal labels for barcode printing, wristbands for patient identification in healthcare, and baggage tags in the aviation sector. The growing demand for specialized thermal paper products tailored to these unique applications is a noticeable trend within the market.

### Segmental Insights

#### Application Insights

Based on the category of Application, the POS segment emerged as the dominant player in the global market for Thermal Paper in 2023. Thermal paper is the preferred choice for printing receipts in retail stores, restaurants, gas stations, and various other businesses using POS systems. The simplicity, speed, and cost-effectiveness of

thermal printers make them the go-to solution for generating customer receipts. Receipts are an integral part of the retail and hospitality industries. Every sale transaction results in the printing of a receipt, which serves as a proof of purchase for customers and a record for businesses. The high transaction volume in these sectors ensures a continuous and substantial demand for thermal paper. Retailers extensively use thermal paper for printing price tags, shelf labels, and other product labels. The durability of thermal labels and their ability to resist fading and smudging are crucial in maintaining organized and accurate product information. Thermal paper is ideal for barcode printing due to its high-quality, high-contrast printing capabilities. Barcode labels are essential for inventory management, price scanning, and quick product identification at the point of sale.

In restaurants, bars, and food service establishments, thermal paper is used for printing order tickets in the kitchen. The heat resistance of thermal paper ensures that the tickets remain legible in a hot and busy kitchen environment. In the era of online ordering and food delivery services, thermal paper is used to print receipts and order details. This application has seen substantial growth with the increase in food delivery platforms. With the rising adoption of mobile POS systems, especially in smaller businesses and pop-up retail locations, thermal paper remains a vital component. These systems, often equipped with compact thermal printers, offer mobility and convenience. They are ideal for businesses with limited counter space, and their ease of use makes them appealing. Mobile POS systems can be used in various settings, from street fairs and farmers' markets to outdoor events and trade shows. Thermal paper's durability and ability to withstand different environmental conditions make it well-suited for such applications. Thermal paper receipts, whether from traditional or mobile POS systems, contribute to an improved customer experience. Businesses can provide personalized and accurate transaction records, which are especially important for returns, exchanges, and warranty claims. These factors are expected to drive the growth of this segment.

## Regional Insights

Asia-Pacific emerged as the dominant player in the global Thermal Paper market in 2023, holding the largest market share in terms of both value and volume. This is due to the expansion of retail chains in the region can be attributed to the growing consumer preference for easily accessible consumer goods. Furthermore, the increased industrial activities in the area have resulted in heightened demand for labeling applications. As developing economies witness a rising market for fast-moving consumer goods (FMCG), manufacturers are expanding their production capacities to meet this demand.



Consequently, there has been a significant uptick in the volume of transactions occurring in retail stores.

#### Key Market Players

Oji Holdings Corp.

Appvion Inc.

Koehler Group

Mitsubishi Paper Mills Ltd.

Hansol Paper Co. Ltd.

Gold Huasheng Paper Co. Ltd.

Henan Province JiangHe Paper Co. Ltd.

Thermal Solutions International Inc.

Iconex LLC

Twin Rivers Paper Company

#### Report Scope:

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

#### Thermal Paper Market,By Application:

oPOS

oTags Label

oLottery Gaming

oOthers

## Thermal Paper Market, By Region:

### oNorth America

United States

Canada

Mexico

### oEurope

France

United Kingdom

Italy

Germany

Spain

### oAsia-Pacific

China

India

Japan

Australia

South Korea

### oSouth America

Brazil

Argentina

Colombia

oMiddle East Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the Global Thermal Paper Market.

Available Customizations:

Global Thermal Paper market report with the given market data, Tech Sci 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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