

01

# Anti-Counterfeit Pharmaceutical Packaging Market

Global Industry Analysis, Size, Share, Growth, Trends Historical Analysis and Forecast Analysis 2022-2027

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# MARKET TAXONOMY



## Packaging Format

- Bottles & Jars
- Vials & Ampoules
- Blisters
- Trays
- Pouches & Sachets
- Others (Tubes, Syringes, etc.)

Emerging Segment: Blisters



## End Applications

- Pharma & Biological
- Medical & Supplies
  - Gloves
  - Scissors
  - Syringes & Needles
  - Surgical Tapes
  - Others
- Medical Equipment
  - Surgical
  - Therapeutic
  - Diagnostic

Emerging Segment: Medical & Supplies



## Technology

- RFID
- Security Inks & Coatings
- Security Seals
- Holograms
- Mass Encryption
  - Barcode
  - Mass Serialization

Emerging Segment: RFID



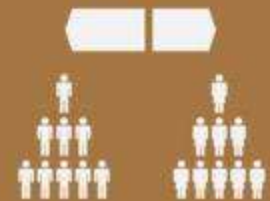
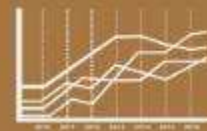
## By Region

- North America
- Latin America
- Europe
- Asia Pacific
- Middle East & Africa

Emerging Segment: Asia Pacific

## Section 01

# Executive Summary



# Anti-Counterfeit Pharma Packaging Market

## Executive Summary

The rampant counterfeiting of drugs has pushed the pharma producers to opt for secure solutions. Anti-counterfeiting packaging is one of the measures that pharma manufacturers are relying on. Pharmaceutical companies have been incorporating anti-counterfeit solutions with their product packages with the technologies such as barcode, security inks & seals, etc. These effective measures considered by pharma companies resulted to give fillip to the market across the globe.

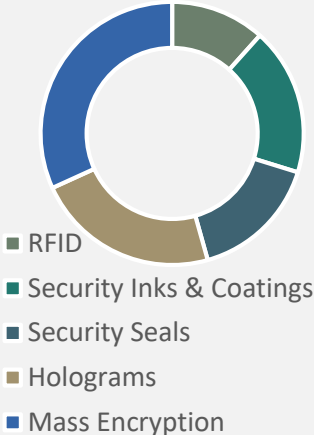
## BY PACKAGING FORMAT

Penetration of “Smart Packaging” to gain traction among the packaging format particularly for pharmaceuticals, enabling ease and convenience for the consumers, therefore, driving the anti-counterfeit pharma packaging market during the forecast period. Bottles segment is anticipated to have prominent market share in terms of value in 2019. Whereas blisters are estimated to register more than quarter of the total market during the forecast period.

### Anti-Counterfeit Pharmaceutical Packaging Market

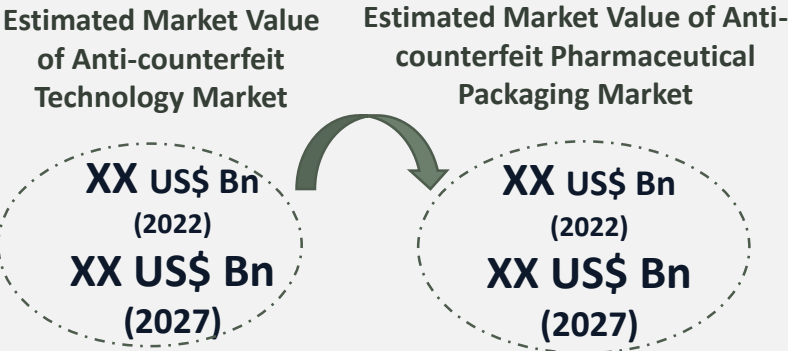
Value CAGR (2019-27)  
**XX%**

## BY TECHNOLOGY

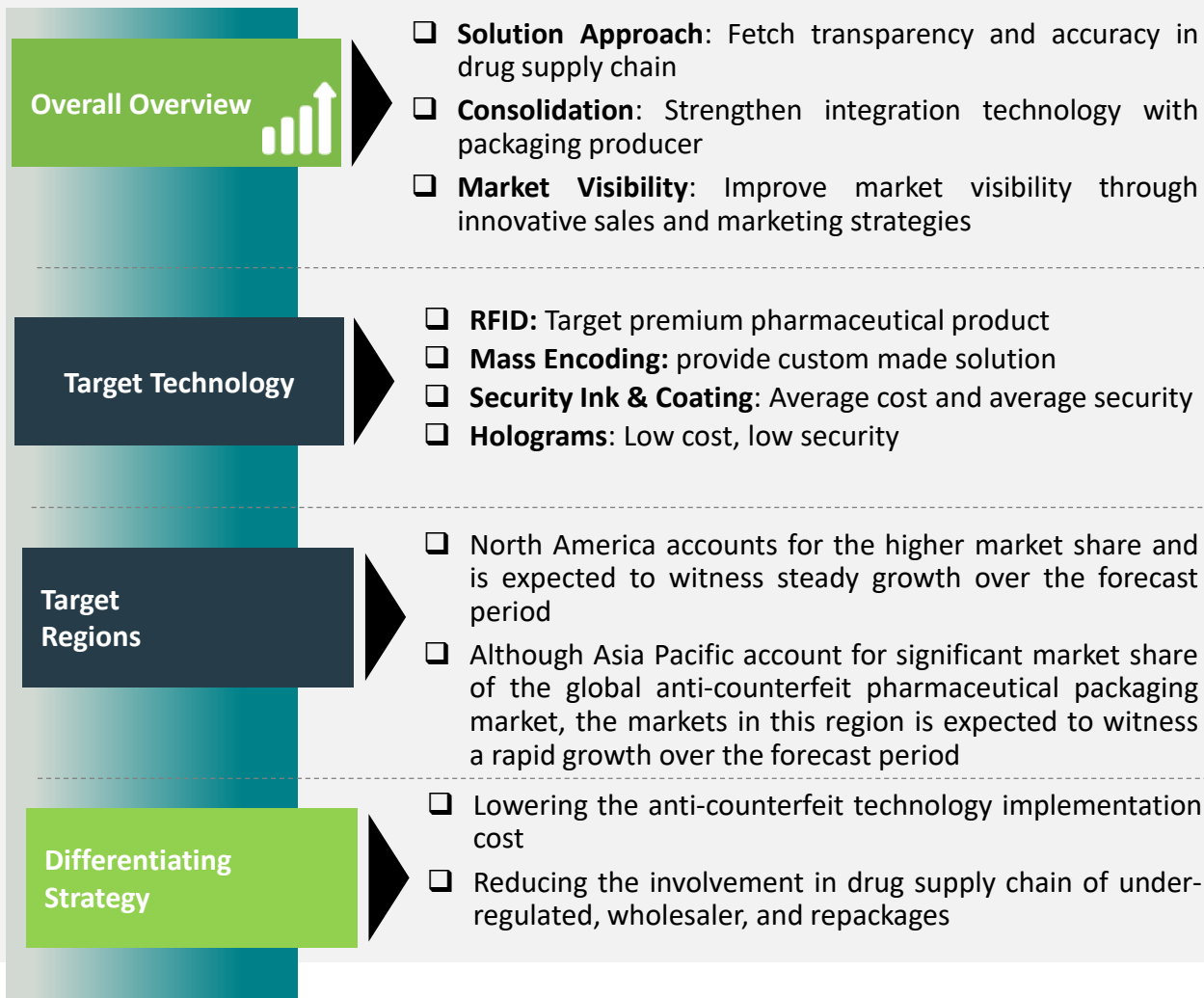
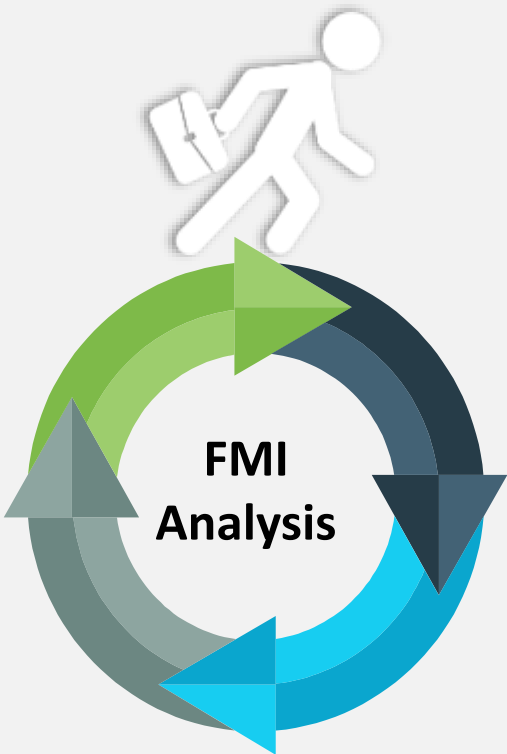


More than **XX%** of the total market is occupied by the mass encoding technology. This can be primarily attributed to rising regulation norms in India and China regarding pharmaceutical counterfeiting and governments in the region mandating bar codes for serialization.

## MARKET VALUE



# FMI Analysis and Recommendations



Source: FMI, 2022

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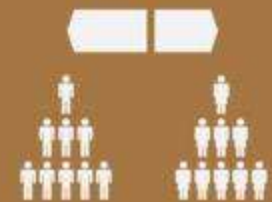
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## Section 02

# Market Introduction



## Anti-Counterfeit Pharmaceutical Packaging: Definition

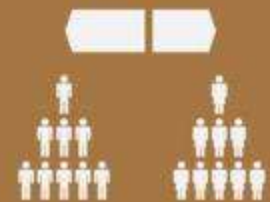
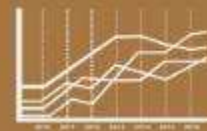
The false representation in pharmaceutical product in relation to its identity or source is known as counterfeiting and the steps taken for prevention are termed anti-counterfeit. In order to maintain the integrity of the original manufacturer's packaging throughout the supply chain, brand owners are adopting security solutions called anti-counterfeiting pharmaceutical packaging. Anti-counterfeit packaging applies directly on the product, its container, packaging, or labeling. It provides an assurance that the packaging code applied by the original manufacturer is unchanged and the product is free from counterfeiting.

The scope of this report includes various technologies such as RFID tags, security seals, security inks & coatings, holograms & mass encryption methods. Mass encryption methods are further segmented into barcodes and mass serialization. Whereas technologies used on pharmaceutical packaging formats includes blisters, bottles, vials & ampoules, etc.



## Section 03

# Market Background

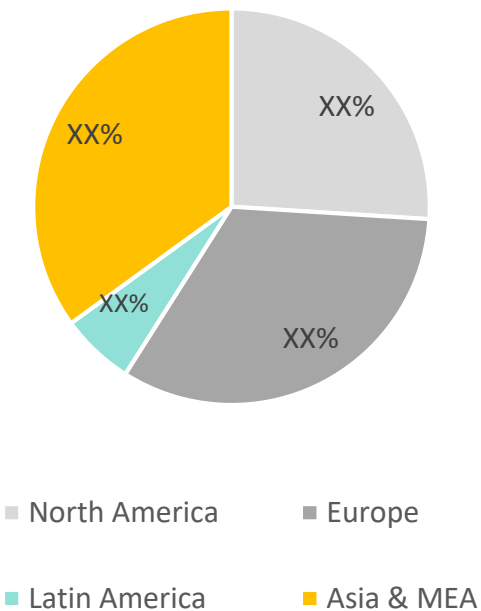


# Global Packaging Industry: Overview

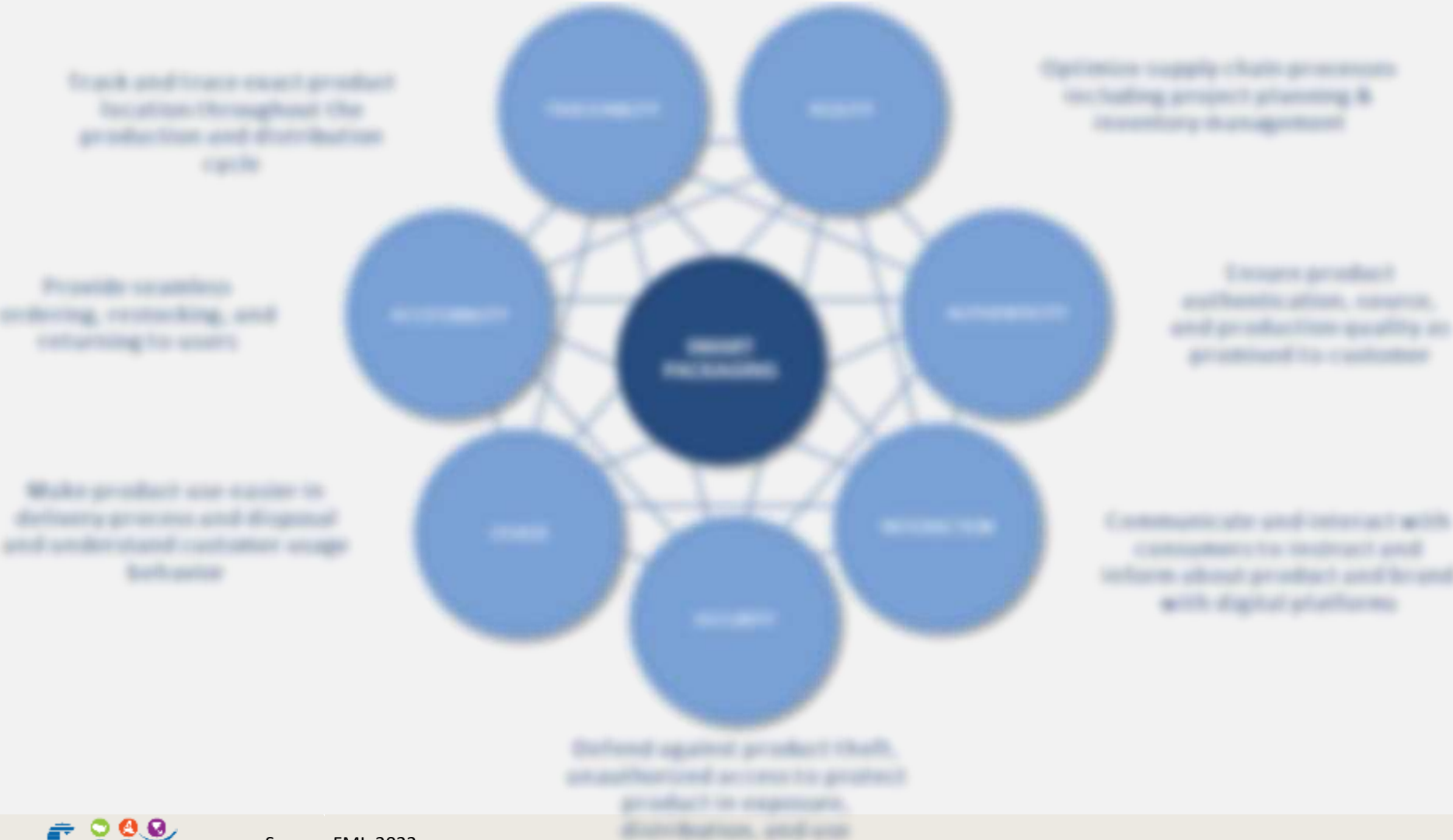
## KEY TAKEAWAYS

- ❑ *The Global Packaging industry was valued at **US \$ XX billion in 2021.***
- ❑ ***The Food & Beverage industry** held a prominent share of the global packaging market, followed by the pharmaceutical industry.*
- ❑ *Recent trends influencing the global market are focus of consumers on wellness, macroeconomic factors such as the increase in the disposable income of the middle class, and environmental impact.*
- ❑ *Rigid and flexible plastics are gaining more prominence as compared to other types.*
- ❑ *Among the various regions, the Asia Pacific region represents a significant growth opportunity.*
- ❑ *At the same time, more developed regions are experiencing substantial business and demographic modifications that will transform value chains in the segment.*
- ❑ *In terms of material type, rigid packaging makes extensive use of paper & paperboard due to an increase in global shipping needs and demand for containers for the transportation of materials and products across borders.*

**Market Value, by Region**  
Total Market Value (2021) 100% = US\$ XX Bn

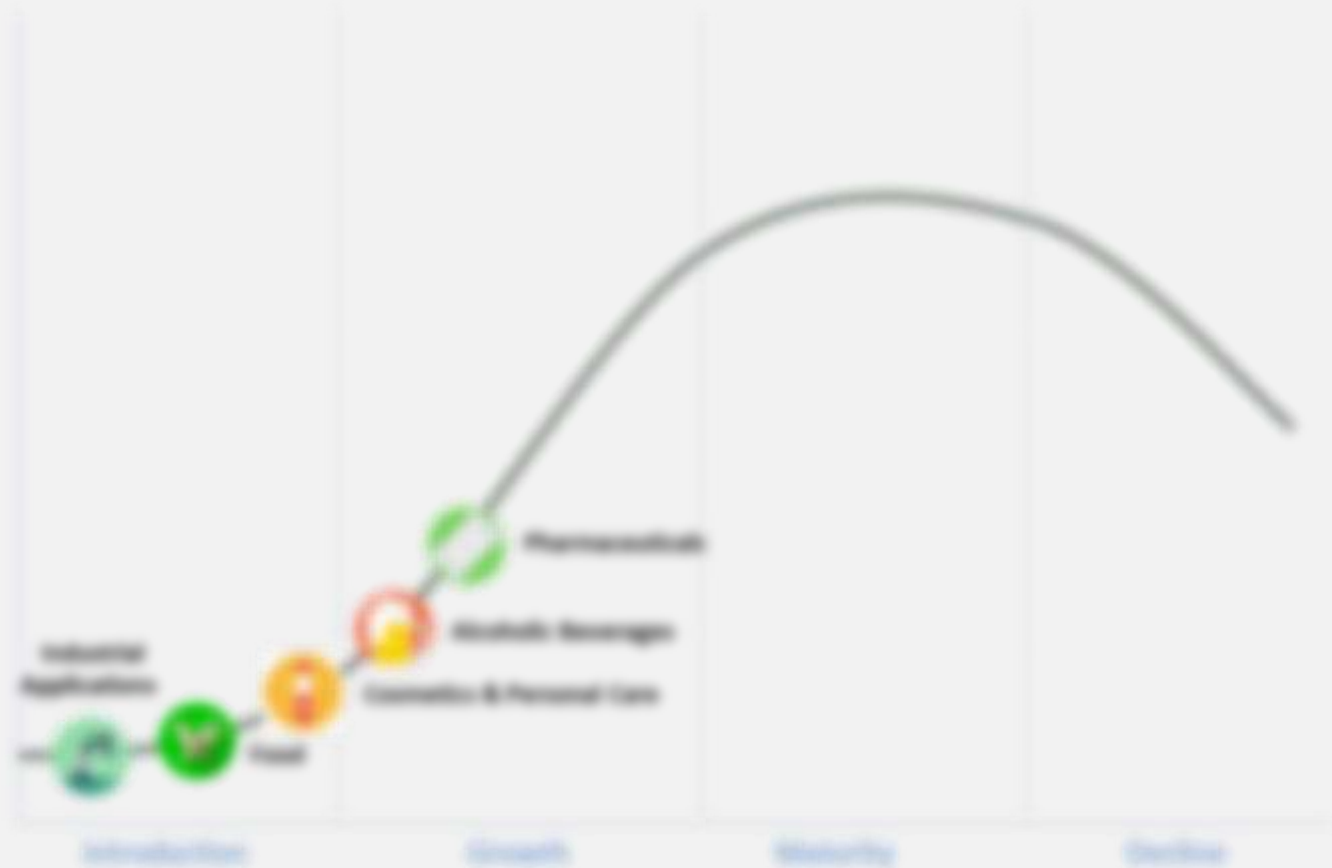


# Functions of Active, Smart & Intelligent Packaging



# Product Life Cycle: Active, Smart & Intelligent Packaging

*Active, smart & intelligent packaging for cosmetics is still in an introduction phase with minimal applications*



The growth of smart packaging (including active & intelligent packaging) is increasing, contributing to the overall market, owing to high efficiency, sustainability, safety, and protection. Smart packaging systems, which integrate active and smart applications in the market in terms of reduction and cost control, development, the product life cycle, the pharmaceutical industry is expected to be in the growth phase due to the high adoption of anti-counterfeiting and the need for enhanced sustainability.

The cosmetics industry seems to be in an introduction phase and expected to enjoy high future growth in the next few years owing to the declining cost of sensors and increased need for packaging the effects of smart packaging for cosmetic products and supply chain.

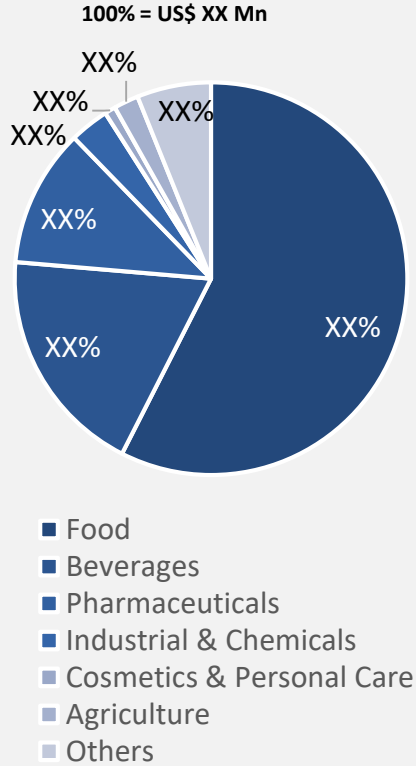
Consequently, smart packaging in cosmetics is expected to witness favorable market opportunity in the cosmetics industry as compared to active packaging.

# Global Active, Smart, and Intelligent Packaging Market Overview

## Global Active, Smart, and Intelligent Packaging Market Outlook

- The global active, smart, and intelligent packaging market was estimated to be valued at **US\$ XX Mn** in 2022, which is expected to reach **US\$ XX Mn** by the end of 2026.
- The North American region is estimated to dominate the global industry with a market share of approximately XX%, during the forecast period.
- North America, followed by Europe, occupies the second spot in the global active, smart, and intelligent market, in terms of both, revenue and consumption.
- Key drivers noticed in the active, smart, and intelligent market are high demand for longer shelf life foods and increasing consumer awareness and inclination towards smart packaging solutions.
- The global active, smart, and intelligent packaging market is estimated to grow at a CAGR of more than XX%, during the forecast period (2018-2026).

Global Active, Smart, and Intelligent Packaging Market 2021 by End Use



# Anti-Counterfeit Pharmaceutical Packaging Market: Macroeconomic Indicators

GDP Growth



**Key Takeaways**

- 1. In 2022, according to the World Bank, the global Gross Value Product (GDP) was approximately 100.0 trillion.
- 2. FMI forecasts the Global GDP growth to face a positive outlook over the forecast period, which is expected to drive the demand for global anti-counterfeit pharmaceutical packaging market over the forecast period.

Healthcare Expenditure

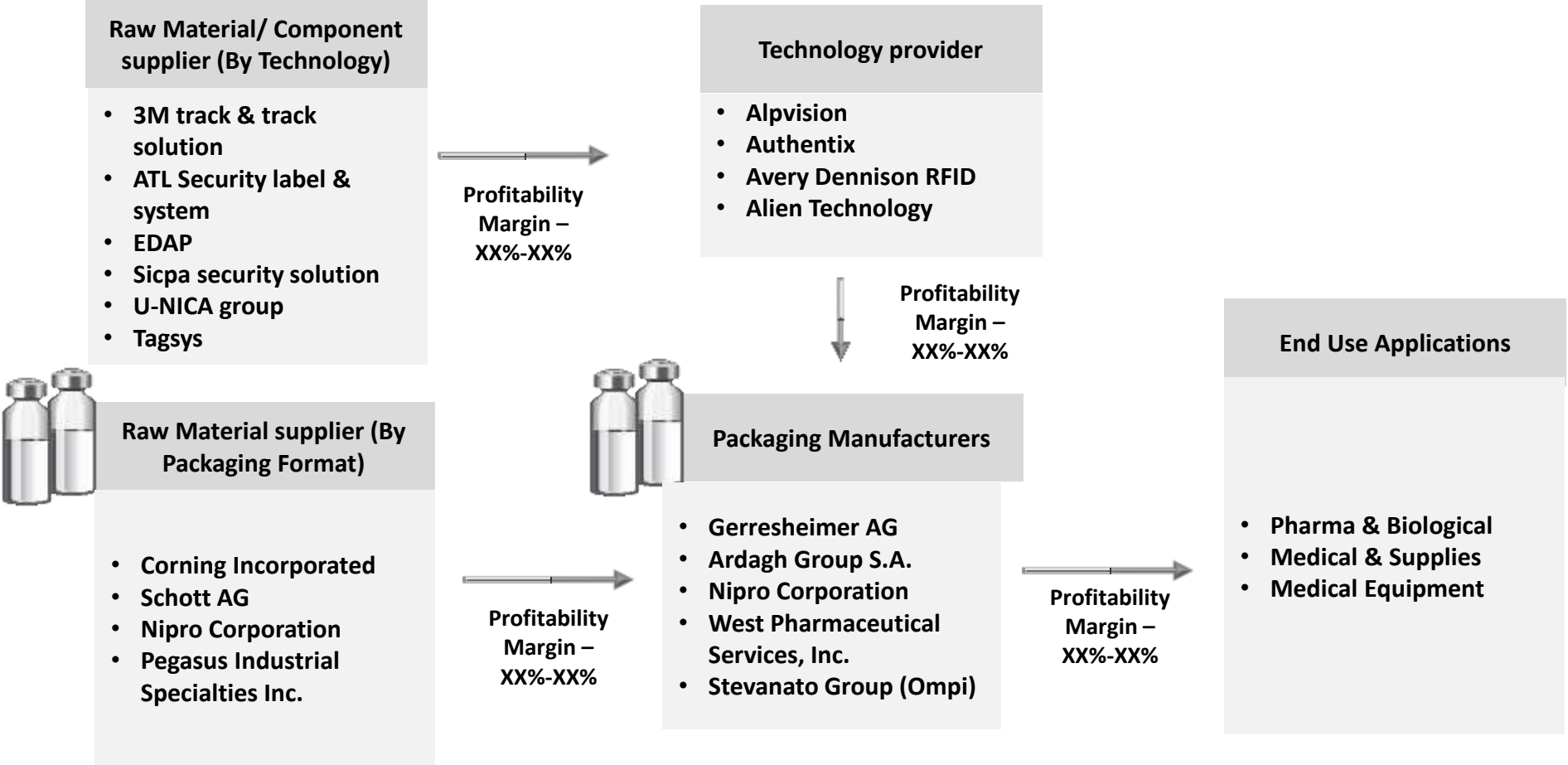


**Key Takeaways**

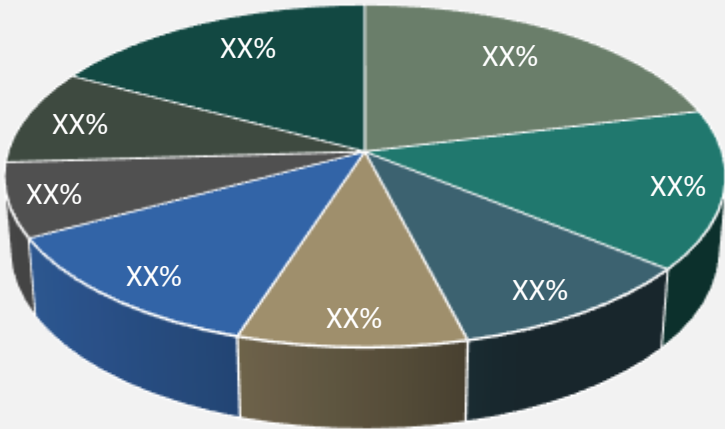
- 1. FMI forecasts the Global healthcare expenditure growth to face a positive outlook over the forecast period, which is expected to drive the demand for global anti-counterfeit pharmaceutical packaging market over the forecast period.



# Anti-Counterfeit Pharmaceutical Packaging Market: Value Chain



# Global Anti-counterfeit Pharmaceuticals Packaging Market: Overview – Most Counterfeited Pharmaceutical Drugs, 2021

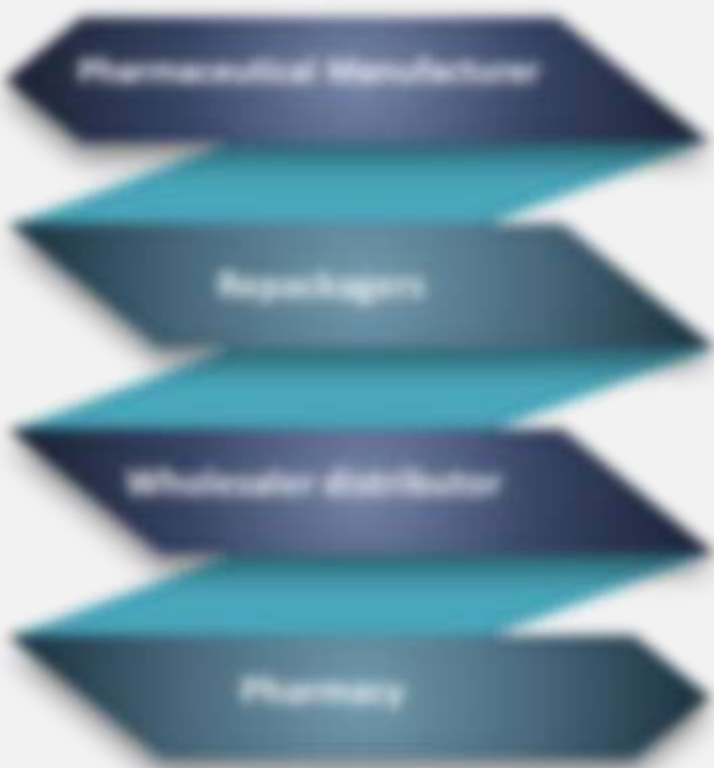


- Antibiotics
- Cancer Drugs
- Cardiovascular
- ED Medications
- Alimentary
- central nervous system
- Anti infection
- Others

- Counterfeited medicine are fake medicine, it may be contaminated or contain wrong ingredient. It is estimated that XX-XX% of worldwide medicine are counterfeited.
- These counterfeited medicine annually generate US\$ XX billion(as per World Customs Organization) market worldwide out of total fake drugs, XX% of all fake drugs are of Antibiotics.
- The high cost of cardiovascular drugs are attacking the counterfeited and the its fake drugs is account for XX% of overall fake drugs. XX% of central nervous system and anti infection medicine are fake.
- Cancer treatment is also costly due to high price of its drugs, XX% of these drugs are found counterfeited

# Drug E-Pedigree for Pharmaceutical

## DRUG DISTRIBUTION CHANNEL



### *Drug E-Pedigree for Pharmaceutical and wholesalers*

*Pedigree is a document or electronic file that contains information to records each and every wholesaler distribution of any given prescription-only drug, from sale by a pharmaceutical manufacturer, through acquisition and sale by any wholesaler distributor or re-packagers or until the final sale to a pharmacy or other dispensing the prescription drug only. The quick and successful implementation of a standard pedigree drug tracking system has led the electronic Pedigree to provide guarantee, strong and secure drug supply chain.*

*Pedigree is a key to ensuring the security of drugs through out the supply chain. Moreover, pedigree provide an further obstacle for counterfeiters to overcome and an additional opportunity for legitimate wholesalers and law enforcement officials to identify counterfeiters.*

*Despite of several benefit of pedigree, FDA failed to implement its final pedigree regulation due to concern that the FDCA/Prescription Drug Marketing Act ) does not require authorized distributors of record to pass information to their customer.*

## Global Anti-Counterfeit Pharmaceutical Packaging Market: Drivers (1/2)

A large portion of pharmaceutical formulations available in the market get counterfeited. The counterfeited pharmaceutical products affect both patients as well as pharma companies with their brand reputation. More than 30% of the total pharmaceutical products in developing markets are counterfeited, and approximately 15% drugs sold across several sales channel in developed markets are fake. The rampant counterfeiting of drugs pushed the pharma producers to opt for secure solutions. Anti-counterfeiting packaging is one of the measures that pharma majors are relying upon. The company has been incorporating anti-counterfeit solutions with its product packages. However, with advancement in the technology, pharmaceutical manufacturers are also integrating new and innovative options with conventional solutions such as integrating authentication overt features with covert elements, forensics, and track & trace elements. Tier II pharma companies also prefer similar approaches. These effective measures considered by pharma companies resulted in the sudden increase in demand for anti-counterfeit pharmaceutical packaging across the globe.

*With Advancement in Technology, Pharmaceutical Manufacturers Integrate Innovative Options*



Source: FMI, 2022

## Global Anti-Counterfeit Pharmaceutical Packaging Market: Drivers (2/2)

### Policy and Regulatory Landscape Paving Way for Anti-counterfeit Packaging



The WHO has been consistently stressing upon the relevance and necessity of effective implementation of quality assurance program, with respect to packaging, through the "Expert Committee on Specifications for Pharmaceutical Preparations." The role of packaging and its synergy with pharmaceutical counterfeiting is one of the key issues highlighted, which advocates packaging design that prevents tampering of packaged generic as well as branded drug. The WHO committee also emphasizes on information and identification of the packaged drug, which its packaging should carry. FDA is active in anti-counterfeiting packaging space and closely monitors any such incident. The premier body for food and drug administration in the U.S. also constituted a task force in 2009 to combat anti-counterfeiting and enforce appropriate measures to prevent illicit drug channeling to the market. The task force explores advanced solutions in anti-counterfeiting space and integrates the same into the pharmaceutical packaging market.

The WHO and FDA's above mentioned efforts encouraged pharma manufacturers to explore new possibilities. This, in turn, is creating value for the suppliers of anti-counterfeit packaging technology to the pharmaceutical industry. The anti-counterfeit pharmaceutical packaging market is responding with positive growth rate, which is likely to continue during the forecast period.

# Global Anti-Counterfeit Pharmaceutical Packaging Market: Restraints (1/2)

## High-cost of Implementing Anti-counterfeiting

Anti-counterfeit product offerings are available in a wide range in terms of price and complexity. However, a system-wide implementation may not be feasible for a developing country. The cost involved in implementing the anti-counterfeiting technology is high. Due to it, the manufacturer ignores the safety and security of the product and decide on cost saving. It is unlikely that any one solution would be appropriate for all applications, as the cost may not be affordable in developing markets. The high cost of RFID may hamper the companies from implementing anti-counterfeiting measures.

## Lack of Criminal Sanction against Counterfeiting

The risk of counterfeit is generally small and legal penalties for counterfeiters are also low in most countries, hence, there is a growing involvement of organized crime in counterfeit medicines. Lack of criminal sanction against counterfeiting is encouraging the fake producer to grow in the market. Law enforcement officials sometimes perceive counterfeiting as less important than violent crimes and crimes against physical property, even though economic damage and health risks are high. More sophisticated technology for copying legitimate labels and packaging is now available. This facilitates the distributors of the fake products.

***High Implementing Cost of Technology and Low Penalties Against Counterfeiting Challenging the Growing Market***

# Global Anti-Counterfeit Pharmaceutical Packaging Market: Restraints (2/2)

**Opting for Pharma Products without Prescription Encouraging Counterfeiting of Drugs**

## Patients are Self Prescribing

It is estimated that 1% of the U.S. adult are using medication without any professional prescription. Increase in number of self prescribed patients is directly encouraging counterfeiting. Sometimes, the end user of pharma products opt for counterfeit products, as they are less expensive compared to the original medications. A large segment of total population is self prescribe specially adults, order medication online through internet trade or directly from pharmacy without having proper knowledge about the medicine. This perception of patient is encouraging the counterfeiting of drugs.



Source: FMI, 2022

# Global Anti-Counterfeit Pharmaceutical Packaging Market: Opportunities (1/2)

## Lifestyle Drugs Offering Significant Growth Potential

Today, life saving drugs are not exempted from the trade in the counterfeit medicine. Almost every medical formulation has been copied and counterfeited. There is high demand for high value life saving drugs among patients. This is driving the counterfeiting market, thus, increasing opportunities for anti-counterfeit techniques in life saving drugs. Maximum counterfeit drugs are found in therapeutic areas such as cardiovascular and central nervous system medications. There has been high percentage increase in these counterfeit medications since the last few years.

It is estimated that 342 people (1.25 billion annually) die every day in North America due to poor life saving medication adherence. In 2015, a series of raids in Spain found counterfeit life saving medicines worth hundreds of millions of dollars and exposed a criminal network feeding consumers across the Middle East.

## Pharma Companies' Initiatives against Counterfeit

Some pharma companies set up departments whose primary function is to protect their brand name and revenue from counterfeiting and stock replication. The companies involve individuals from different application areas of the company, which help the organization to put holistic tracking model in place. The clear intention of the manufacturers is to protect their brand name from counterfeiting.

Thus, a pharma company is working with wholesalers, pharmacy community, regulators, and law enforcement agencies around the world -- including the FDA, the British Medicines and Healthcare Products Regulatory Agency (MHRA), and the Australian Therapeutic Goods Administration (TGA) -- to determine how to best keep the drug distribution system safe for the patients.

*Increasing Demand for Lifestyle Drugs Offering Significant Growth*

*Initiatives Taken by Key Manufacturer against Counterfeit Drugs*



# Global Anti-Counterfeit Pharmaceutical Packaging Market: Opportunities (1/2)

*Advancement in Technologies Expected to Boost Global Anti-counterfeit Pharmaceutical Packaging Market*

## Technological Advancement Aiding the Anti Counterfeit Packaging

Manufacturers have taken steps to tackle the menace of counterfeited medicines through innovative packaging techniques. These are still in the infancy stage, but future looks promising. Advancement in technology is making counterfeiting more difficult. Nanotechnology remains greater and largely untapped technology for improving efficiency, purity, and quality of pharmaceutical and medical device packaging.

Large pharmaceutical companies such as Pfizer and GlaxoSmithKline have introduced RFID tags on the packaging of vials and bottles, an RFID treatment product.

Source: FMI, 2022

# Global Anti-Counterfeit Pharmaceutical Packaging Market: Trends (1/2)

## Approach Toward Secured Electronic Track and Trace

For secure supply of drug from the manufacturer to end user, one of the key requirements is the ability to track, validate, and verify the authenticity of the drug at each and every stage of the supply chain. In electronic track and trace technology, each unit is serialized and allows building the drug pedigree. These pedigrees include information about the manufacturer, distributors, and any wholesaler who handles the drug. This prevention helps in tracing product at any stage and reducing counterfeiting.

In November 2012, the President of the U.S signed a public law 112-86. This law contains provision for a national track & trace system for prescription medication. The law includes a provision that prompts California's pedigree requirements.

## Edible Micro tags and Proprietary Reader Technology

Growth in counterfeit pharmaceuticals can be credited to the fact that counterfeiters have employed the use of technology in manufacturing and packaging of the pharmaceutical product. A new innovative technology "micro tag" have been developed by one of the US based company, which is an edible micro-tag for identification, authentication, brand protection and quality assurance of individual medicine. Each tag contains a unique code that can only be scanned using the company's proprietary instruments. Along with each unit array of unique signatures, these codes can be associated with a wide varieties of information, similar to a traditional printed bar code. This allows the technology to serve as covert, heat-resistant, edible bar codes. These can also be used for electronic components, industrial parts, food items, and a range of consumer goods.

© US based company, TruTag Technologies has developed the microtag and proprietary reader technology.

*Growing Demand for Innovative and Secure Packaging and Brand Protection Expected to Give Market Growth*

# Global Anti-Counterfeit Pharmaceutical Packaging Market: Trends (2/2)

*Growing Demand for Innovative and Secure Packaging and Brand Protection Expected to Give Market Growth*



## Mobile Phone Readable Tags

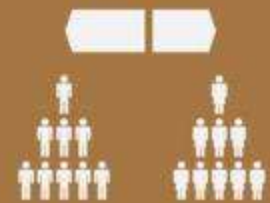
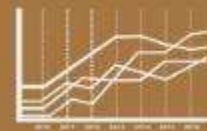
The mobile phone readable tag technology encompasses the development of an innovative means for creating a tag that is practically impossible to copy and be read by a smart phone. This technology enables brand owners to handle each product individually, in turn enabling the brand owners to send product-specific information directly to the customers. Brand owners and customers are then able to enjoy one-to-one relationship, with product launches, upgrades, and news all available directly to the customer through the smartphone.

Leading developed a OTC brand company have developed the mobile phone readable tag and counterfeited packaging solution.

Source: FMI, 2022

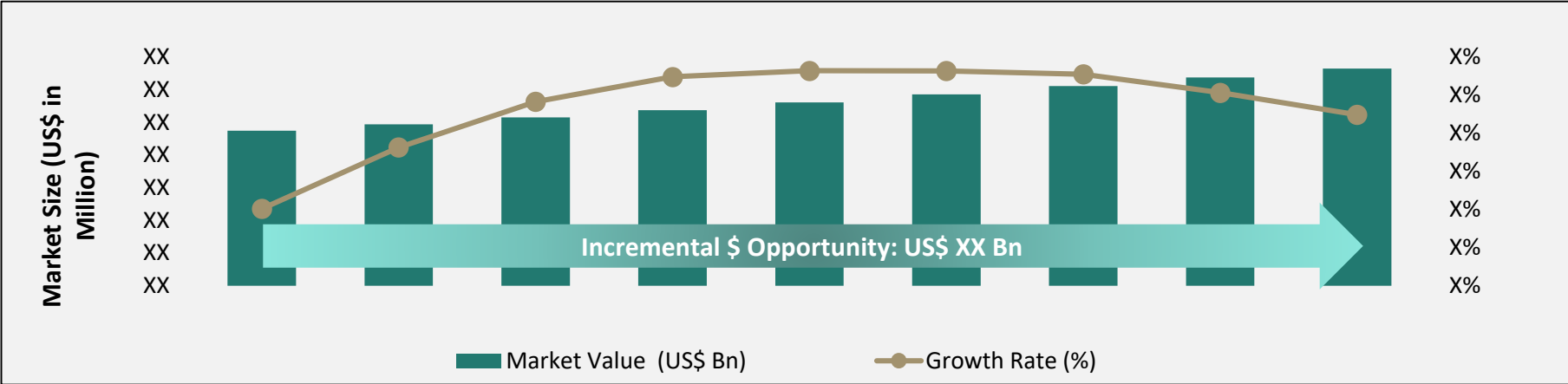
## Section 04

# Market Forecast

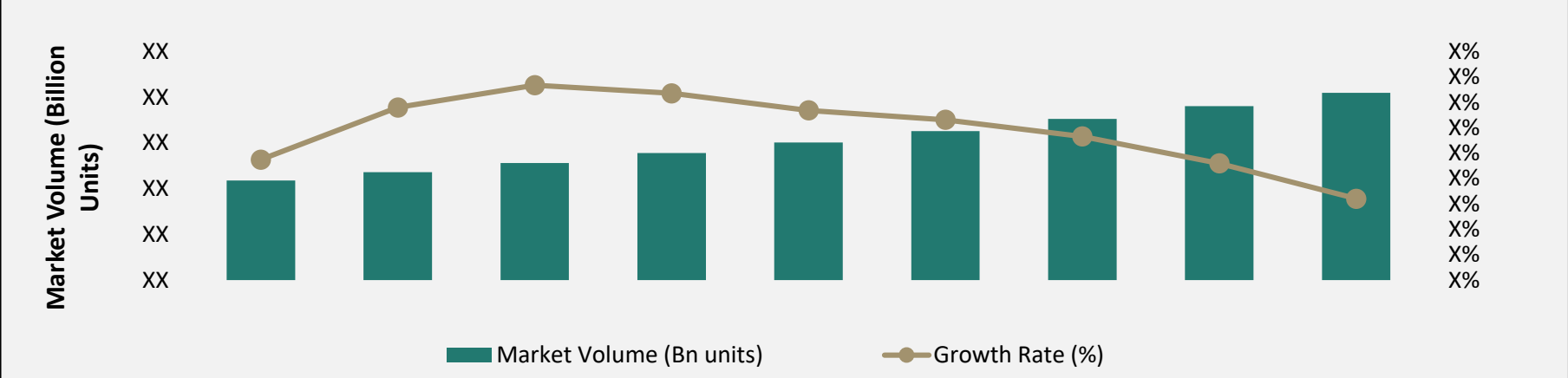


# Anti-Counterfeit Pharma Packaging Market: Volume & Value Forecast, Incremental \$ Opportunity and Y-o-Y growth (2019 – 2027)

Anti-Counterfeit Pharma Packaging Value Projection (US\$ Bn) and Growth Rate (2019 – 2027)

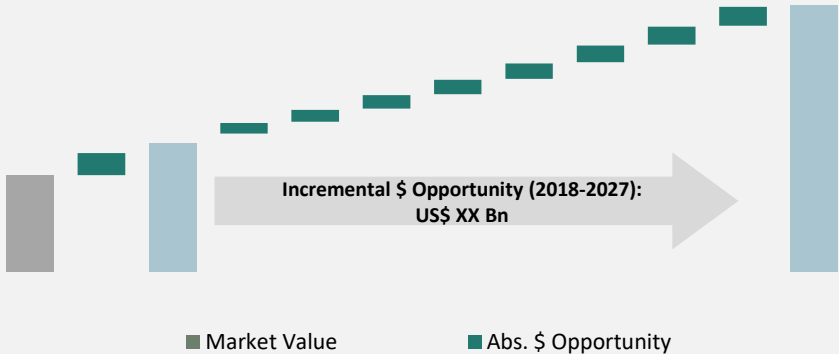


Anti-Counterfeit Pharma Packaging Market Volume Projection (Bn Units) and Growth Rate (2019 – 2027)

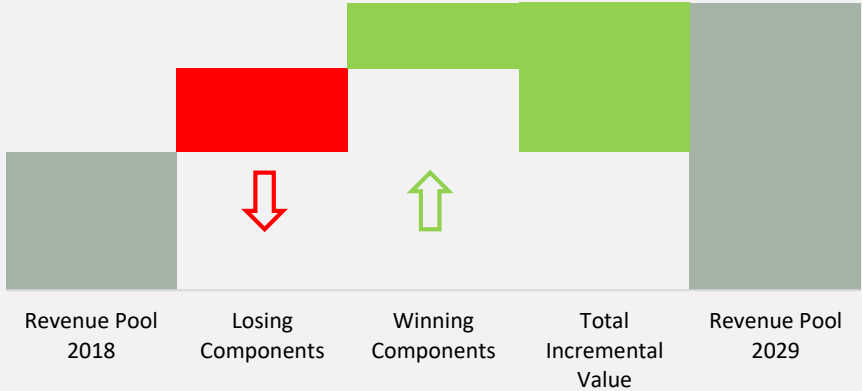


# Global Anti-counterfeit Pharmaceuticals Market Demand Analysis 2014-2021, and Forecast 2022-2027

Global Anti-counterfeit Pharmaceuticals Market Value (US\$ Bn) and Absolute \$ Opportunity (US\$ Bn)



Absolute \$ Opportunity (US\$ Mn) between Winning & Losing Components

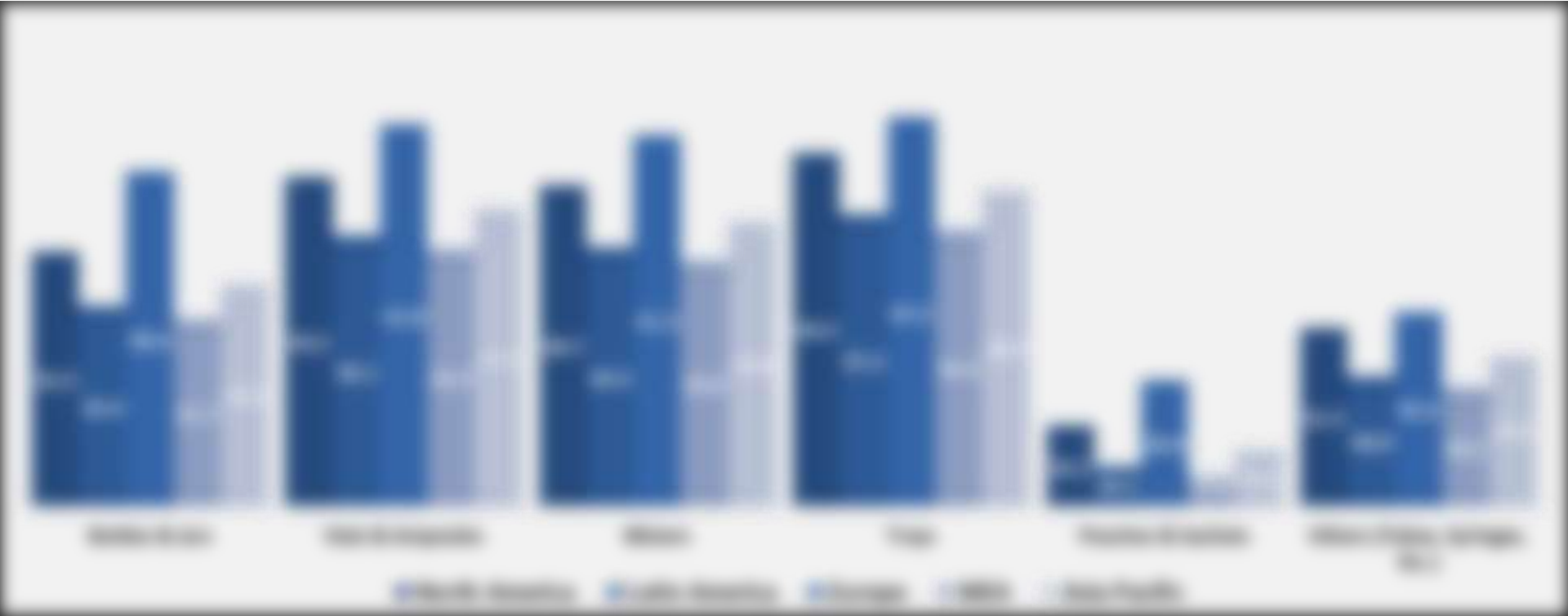


### Key Takeaways

- ❑ Figures above indicates global anti-counterfeit pharmaceuticals market value (US\$ Mn) and absolute \$ opportunity (US\$ Mn) during 2014H-2027F
- The global anti-counterfeit pharmaceuticals market is expected to represent a total incremental opportunity of US\$ XX Bn by the end of 2027.
- By considering basis point share during (2022-2027), bottles & jars, vials & ampoules, trays, and pouches & sachets segments are estimated to be the losing components in global anti-counterfeiting pharmaceuticals market; whereas, blisters, and others (tubes, syringes, etc.) segments are expected to cumulatively create an incremental opportunity of US\$ 34.1 Bn by the end of 2027.

# Anti-counterfeit Pharmaceuticals Packaging Market: Pricing

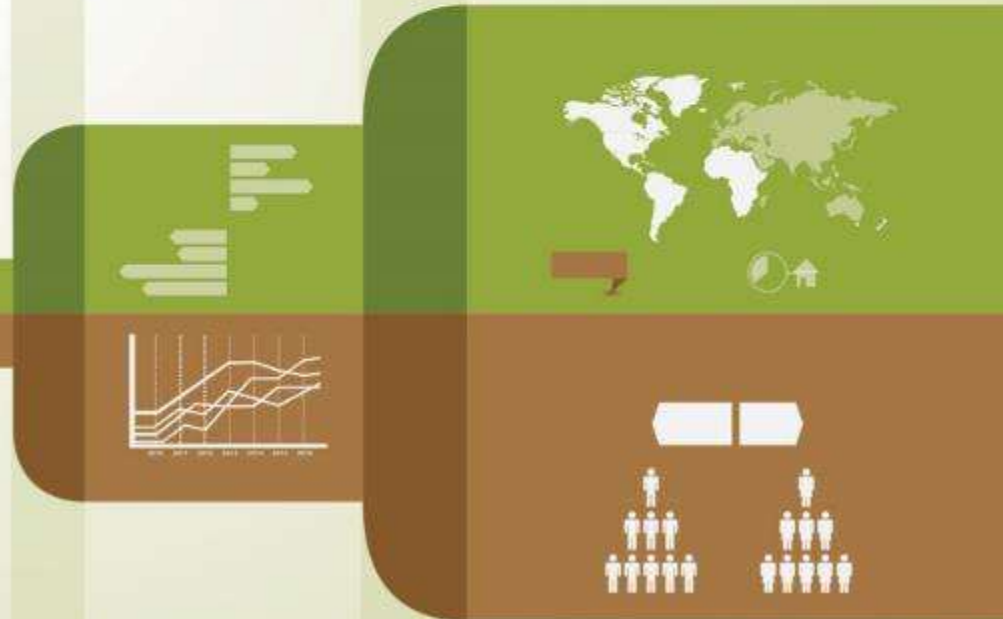
Regional Pricing Analysis, by Packaging Format (2021A)



Source: FMI, 2022

## Section 05

# Global Anti-counterfeit Pharmaceuticals Packaging Market Analysis By Packaging Formats





# Global Anti Counterfeit Pharma Packaging Market Analysis, by Packaging Format

Bottles segment is anticipated to outpace other segments

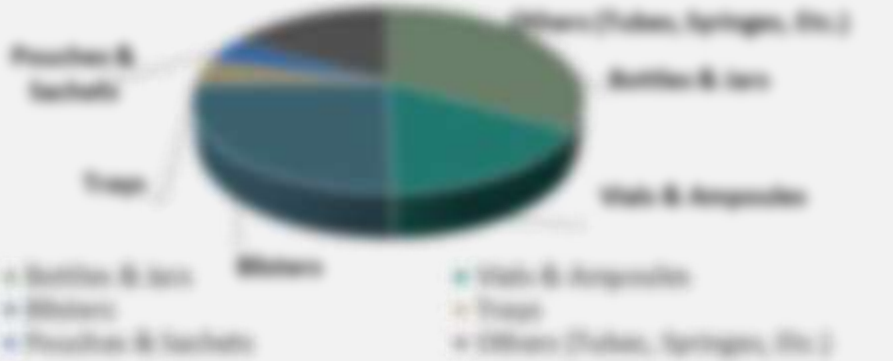
Figure 11: Global Anti Counterfeit Pharma Packaging Market Value (Bn), by Packaging Format (2020E & 2025E)



According to FMI analysis, the bottles & jars segment is expected to dominate despite a forecast decline in market volume share by 0.4%. However, vials & ampoules segment is expected to gain grounds and register a volume CAGR of 0.0% due to increased usage in healthcare sector.

Bottles and jars segment is projected to grow at a CAGR of 0.4% & to value at USD 21.8 in 2025. This can be attributed to cost effective packaging offered by bottles. Vials has created lucrative opportunities in near future. Vial packaging is still very low in terms of consumption and the bottles are still widely used packaging format for the primary packaging of pharmaceutical medicines and syringes. Trays segment is projected to expand at a sluggish rate during the forecast period.

Figure 12: Global Anti Counterfeit Pharma Packaging Market Value Share, by Packaging Format (2020E)



Source: FMI, 2022

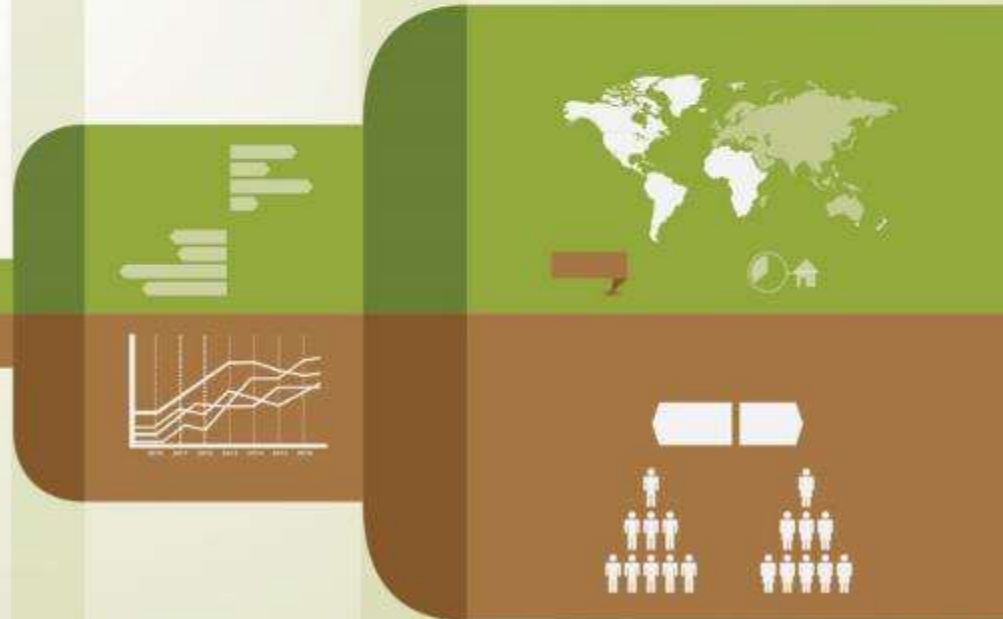
# Global Anti Counterfeit Pharma Packaging Market, by Packaging Format

Table 22: Global Anti Counterfeit Pharma Packaging Market Value (USD Mn) and Volume (Mn Units), Historical & Forecast, by Packaging Format, 2018-2021 & 2022-2027 (F)

Region	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	
North America	Value	15000	16000	17000	18000	19000	20000	21000	22000	23000	24000	15000	16000	17000	18000	19000	20000	21000	22000	23000	24000
	Volume	100	105	110	115	120	125	130	135	140	145	100	105	110	115	120	125	130	135	140	145
Europe	Value	12000	13000	14000	15000	16000	17000	18000	19000	20000	21000	12000	13000	14000	15000	16000	17000	18000	19000	20000	21000
	Volume	80	85	90	95	100	105	110	115	120	125	80	85	90	95	100	105	110	115	120	125
Asia Pacific	Value	8000	9000	10000	11000	12000	13000	14000	15000	16000	17000	8000	9000	10000	11000	12000	13000	14000	15000	16000	17000
	Volume	50	55	60	65	70	75	80	85	90	95	50	55	60	65	70	75	80	85	90	95
Latin America	Value	3000	3500	4000	4500	5000	5500	6000	6500	7000	7500	3000	3500	4000	4500	5000	5500	6000	6500	7000	7500
	Volume	20	22	24	26	28	30	32	34	36	38	20	22	24	26	28	30	32	34	36	38
Middle East & Africa	Value	2000	2500	3000	3500	4000	4500	5000	5500	6000	6500	2000	2500	3000	3500	4000	4500	5000	5500	6000	6500
	Volume	15	16	17	18	19	20	21	22	23	24	15	16	17	18	19	20	21	22	23	24
Rest of World	Value	1000	1200	1400	1600	1800	2000	2200	2400	2600	2800	1000	1200	1400	1600	1800	2000	2200	2400	2600	2800
	Volume	10	11	12	13	14	15	16	17	18	19	10	11	12	13	14	15	16	17	18	19
Global	Value	35000	38000	41000	44000	47000	50000	53000	56000	59000	62000	35000	38000	41000	44000	47000	50000	53000	56000	59000	62000
	Volume	250	265	280	295	310	325	340	355	370	385	250	265	280	295	310	325	340	355	370	385

## Section 06

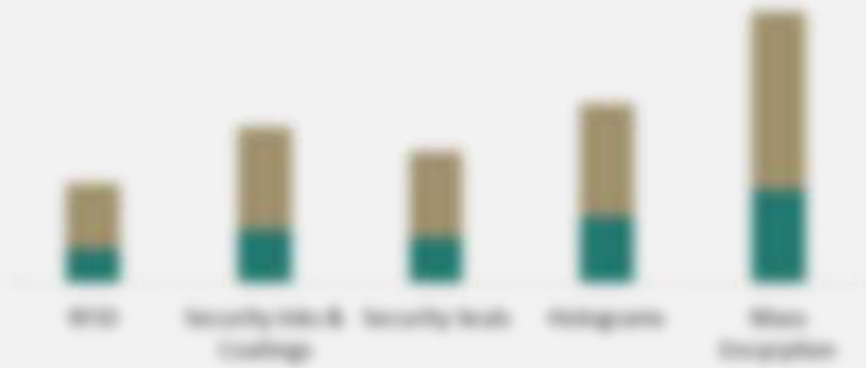
# Global Anti-counterfeit Pharmaceuticals Packaging Market Analysis By Technology



# Global Anti Counterfeit Pharma Packaging Market Analysis, by Technology

Figure 28: North America Anti Counterfeit Pharma Packaging Market Value (2022-2027), by Technology (2022)

Figure 29: North America Anti Counterfeit Pharma Packaging Market Value (2022-2027), by Technology (2022 & 2027)



- The RFID segment is projected to expand at an impressive CAGR of 8.8% over the forecast period, gaining 50 basis points by 2027 over 2022, accounting for nearly 22% of the total revenues of the Global Anti-counterfeit Pharmaceutical Packaging Market
  - Owing to the significant add-on features offered by RFID over bar codes, many prominent pharmaceutical companies are increasingly incorporating RFID with their most susceptible medicines. Some of the prominent companies that are increasing their RFID incorporations are Pfizer, Purdue Pharma, and GSK
- Furthermore, the Holograms segment is projected to expand at a CAGR of 7.2% over the forecast period, representing an incremental opportunity of 200,000 Mn, over the forecast period
  - Holograms are anticipated to continue being commonly used as a primary method for product authentication in conjunction with other smart features. However, as holograms contain a certain risk of being easily copied and are high, alternative technologies might pose some restraints to its growth.

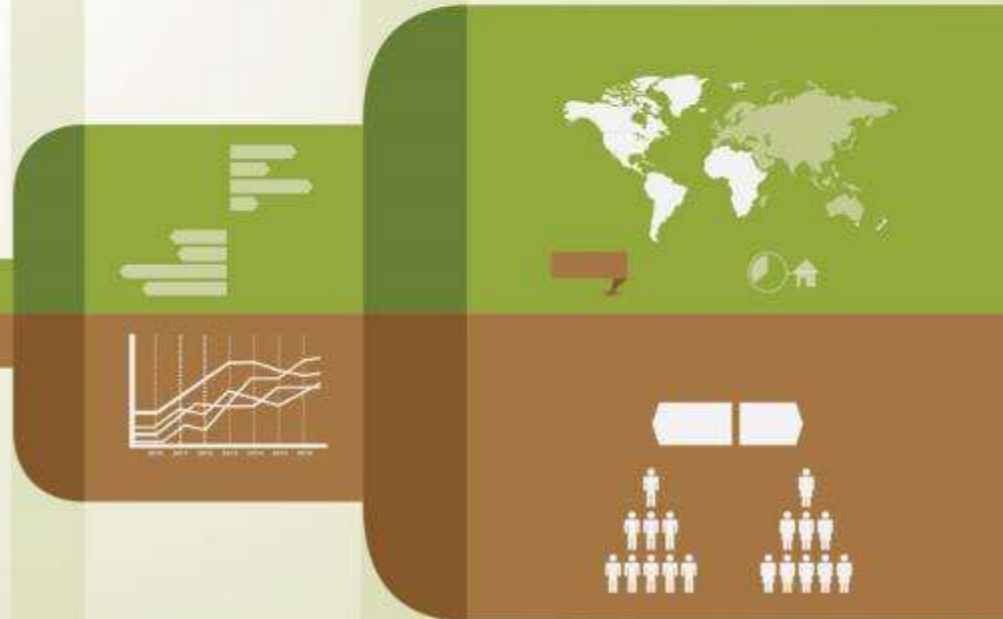
# Global Anti Counterfeit Pharma Packaging Market, by Technology

Table 22: Global Anti Counterfeit Pharma Packaging Market Value (USD Bn) Historical & Forecast, by Technology - 2018 (E) - 2027 (F)

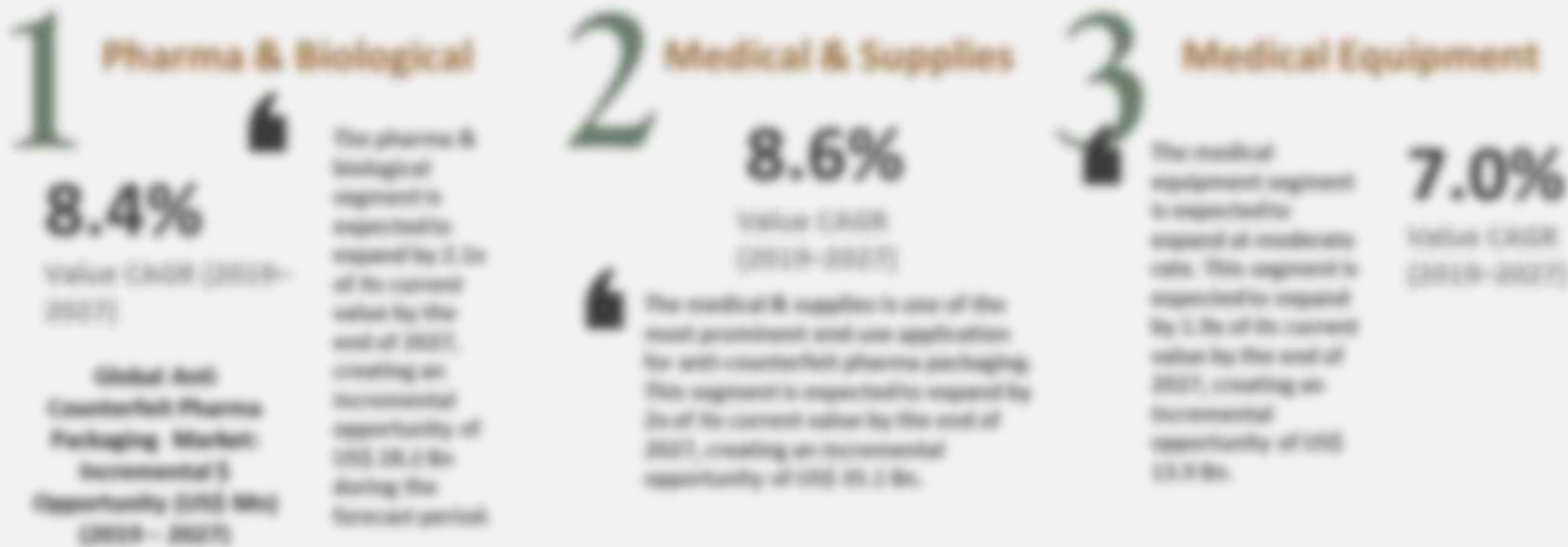
Technology	2018 (E)	2019 (E)	2020 (E)	2021 (F)	2022 (F)	2023 (F)	2024 (F)	2025 (F)	2026 (F)	2027 (F)	CAGR	CAGR
RFID	144	155	167	179	191	203	215	227	239	251	7.0%	8.0%
Security Ink & Coating	144	155	167	179	191	203	215	227	239	251	6.8%	8.7%
Security Ink	144	155	167	179	191	203	215	227	239	251	7.4%	8.0%
Integrations	144	155	167	179	191	203	215	227	239	251	6.8%	7.1%
Web Integration	144	155	167	179	191	203	215	227	239	251	6.7%	8.0%
Barcode	144	155	167	179	191	203	215	227	239	251	6.8%	6.8%
Web Authentication	144	155	167	179	191	203	215	227	239	251	6.8%	8.7%
<b>Total</b>	<b>144</b>	<b>155</b>	<b>167</b>	<b>179</b>	<b>191</b>	<b>203</b>	<b>215</b>	<b>227</b>	<b>239</b>	<b>251</b>	<b>7.2%</b>	<b>8.2%</b>

## Section 07

# Global Anti-counterfeit Pharmaceuticals Packaging Market Analysis By End Use Applications



# Global Anti Counterfeit Pharma Packaging Market Analysis, by End Use Applications



Source: FMI, 2022

# Global Anti Counterfeit Pharma Packaging Market, by End Use Applications

Table 25: Global Anti Counterfeit Pharma Packaging Market Value (USD Mn) and Volume (Mn Units), Historical & Forecast, by End Use Applications, 2018 (H) – 2027 (F)

Application	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	CAGR	CAGR	
Pharma & Biotech	Value	28,748	29,208	29,748	30,488	31,308	32,212	33,202	34,282	35,452	36,712	38,062	39,502	41,032	42,652	44,362	7.8%	8.7%
	Volume	528	578	628	688	748	808	868	928	988	1,048	1,108	1,168	1,228	1,288	1,348	7.7%	8.6%
Medical Devices	Value	22,888	23,287	23,686	24,085	24,484	24,883	25,282	25,681	26,080	26,479	26,878	27,277	27,676	28,075	28,474	7.3%	8.0%
	Volume	667	692	717	742	767	792	817	842	867	892	917	942	967	992	1,017	7.6%	8.0%
Other Products	Value	22,248	22,272	22,297	22,321	22,345	22,370	22,394	22,418	22,443	22,467	22,491	22,515	22,540	22,564	22,588	0.2%	0.2%
	Volume	392	377	362	347	332	317	302	287	272	257	242	227	212	197	182	-0.8%	-0.8%
Total	Value	53,884	54,767	55,741	56,801	57,956	59,204	60,554	62,006	63,564	65,231	67,009	68,887	70,865	72,943	75,121	7.3%	8.0%
	Volume	1,587	1,647	1,707	1,767	1,827	1,887	1,947	2,007	2,067	2,127	2,187	2,247	2,307	2,367	2,427	7.2%	8.0%



# Global Anti Counterfeit Pharma Packaging Market, by Medical Supplies

Table 05: Global Anti Counterfeit Pharma Packaging Market Value (USD Mn) and Volume (Bn Units), Historical & Forecast, by End Use Application, 2018-20 - 2027-21

		2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041	2042	2043	2044	2045	2046	2047	2048	2049	2050																																																																																																																																																				
Pharmaceuticals	Value	100	105	110	115	120	125	130	135	140	145	150	155	160	165	170	175	180	185	190	195	200	205	210	215	220	225	230	235	240	245	250	255	260	265	270	275	280	285	290	295	300	305	310	315	320	325	330	335	340	345	350	355	360	365	370	375	380	385	390	395	400	405	410	415	420	425	430	435	440	445	450	455	460	465	470	475	480	485	490	495	500	505	510	515	520	525	530	535	540	545	550	555	560	565	570	575	580	585	590	595	600	605	610	615	620	625	630	635	640	645	650	655	660	665	670	675	680	685	690	695	700	705	710	715	720	725	730	735	740	745	750	755	760	765	770	775	780	785	790	795	800	805	810	815	820	825	830	835	840	845	850	855	860	865	870	875	880	885	890	895	900	905	910	915	920	925	930	935	940	945	950	955	960	965	970	975	980	985	990	995	1000
	Volume	100	105	110	115	120	125	130	135	140	145	150	155	160	165	170	175	180	185	190	195	200	205	210	215	220	225	230	235	240	245	250	255	260	265	270	275	280	285	290	295	300	305	310	315	320	325	330	335	340	345	350	355	360	365	370	375	380	385	390	395	400	405	410	415	420	425	430	435	440	445	450	455	460	465	470	475	480	485	490	495	500	505	510	515	520	525	530	535	540	545	550	555	560	565	570	575	580	585	590	595	600	605	610	615	620	625	630	635	640	645	650	655	660	665	670	675	680	685	690	695	700	705	710	715	720	725	730	735	740	745	750	755	760	765	770	775	780	785	790	795	800	805	810	815	820	825	830	835	840	845	850	855	860	865	870	875	880	885	890	895	900	905	910	915	920	925	930	935	940	945	950	955	960	965	970	975	980	985	990	995	1000
Medical Devices	Value	100	105	110	115	120	125	130	135	140	145	150	155	160	165	170	175	180	185	190	195	200	205	210	215	220	225	230	235	240	245	250	255	260	265	270	275	280	285	290	295	300	305	310	315	320	325	330	335	340	345	350	355	360	365	370	375	380	385	390	395	400	405	410	415	420	425	430	435	440	445	450	455	460	465	470	475	480	485	490	495	500	505	510	515	520	525	530	535	540	545	550	555	560	565	570	575	580	585	590	595	600	605	610	615	620	625	630	635	640	645	650	655	660	665	670	675	680	685	690	695	700	705	710	715	720	725	730	735	740	745	750	755	760	765	770	775	780	785	790	795	800	805	810	815	820	825	830	835	840	845	850	855	860	865	870	875	880	885	890	895	900	905	910	915	920	925	930	935	940	945	950	955	960	965	970	975	980	985	990	995	1000
	Volume	100	105	110	115	120	125	130	135	140	145	150	155	160	165	170	175	180	185	190	195	200	205	210	215	220	225	230	235	240	245	250	255	260	265	270	275	280	285	290	295	300	305	310	315	320	325	330	335	340	345	350	355	360	365	370	375	380	385	390	395	400	405	410	415	420	425	430	435	440	445	450	455	460	465	470	475	480	485	490	495	500	505	510	515	520	525	530	535	540	545	550	555	560	565	570	575	580	585	590	595	600	605	610	615	620	625	630	635	640	645	650	655	660	665	670	675	680	685	690	695	700	705	710	715	720	725	730	735	740	745	750	755	760	765	770	775	780	785	790	795	800	805	810	815	820	825	830	835	840	845	850	855	860	865	870	875	880	885	890	895	900	905	910	915	920	925	930	935	940	945	950	955	960	965	970	975	980	985	990	995	1000
Medical Supplies	Value	100	105	110	115	120	125	130	135	140	145	150	155	160	165	170	175	180	185	190	195	200	205	210	215	220	225	230	235	240	245	250	255	260	265	270	275	280	285	290	295	300	305	310	315	320	325	330	335	340	345	350	355	360	365	370	375	380	385	390	395	400	405	410	415	420	425	430	435	440	445	450	455	460	465	470	475	480	485	490	495	500	505	510	515	520	525	530	535	540	545	550	555	560	565	570	575	580	585	590	595	600	605	610	615	620	625	630	635	640	645	650	655	660	665	670	675	680	685	690	695	700	705	710	715	720	725	730	735	740	745	750	755	760	765	770	775	780	785	790	795	800	805	810	815	820	825	830	835	840	845	850	855	860	865	870	875	880	885	890	895	900	905	910	915	920	925	930	935	940	945	950	955	960	965	970	975	980	985	990	995	1000
	Volume	100	105	110	115	120	125	130	135	140	145	150	155	160	165	170	175	180	185	190	195	200	205	210	215	220	225	230	235	240	245	250	255	260	265	270	275	280	285	290	295	300	305	310	315	320	325	330	335	340	345	350	355	360	365	370	375	380	385	390	395	400	405	410	415	420	425	430	435	440	445	450	455	460	465	470	475	480	485	490	495	500	505	510	515	520	525	530	535	540	545	550	555	560	565	570	575	580	585	590	595	600	605	610	615	620	625	630	635	640	645	650	655	660	665	670	675	680	685	690	695	700	705	710	715	720	725	730	735	740	745	750	755	760	765	770	775	780	785	790	795	800	805	810	815	820	825	830	835	840	845	850	855	860	865	870	875	880	885	890	895	900	905	910	915	920	925	930	935	940	945	950	955	960	965	970	975	980	985	990	995	1000

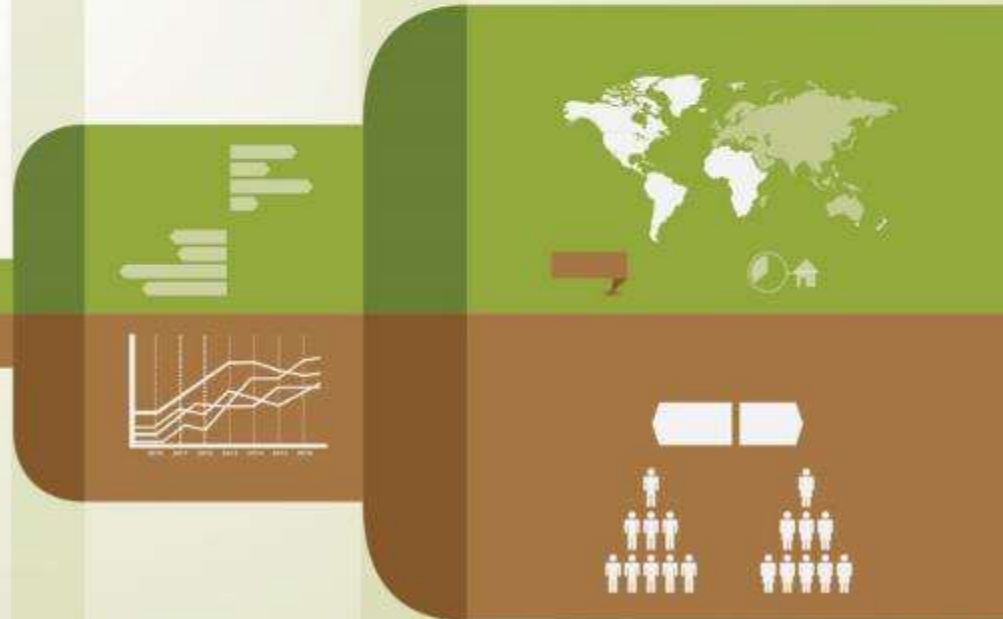
# Global Anti Counterfeit Pharma Packaging Market, by End Use Applications

Table 60 - Global Anti Counterfeit Pharma Packaging Market Value (USD Bn) and Volume (Bn Units), Historical & Forecast, by End Use Applications, 2018 (E) - 2027 (F)

End Use Applications	2018 (E)	2019 (E)	2020 (E)	2021 (E)	2022 (E)	2023 (F)	2024 (F)	2025 (F)	2026 (F)	2027 (F)	CAGR	CAGR					
Hospital	Value	10,213	10,213	11,276	12,229	12,876	13,669	14,500	15,254	17,460	18,818	19,272	21,760	23,309	24,850	6.2%	7.2%
	Volume	280	280	310	330	350	380	400	420	480	520	530	580	620	680	6.2%	7.2%
Pharmacy	Value	900	900	1,000	1,100	1,176	1,254	1,340	1,430	1,590	1,810	1,760	1,880	2,020	2,180	6.2%	6.8%
	Volume	25	25	28	30	32	35	38	40	45	48	48	52	55	58	5.8%	6.4%
Retail	Value	1,800	1,800	1,700	1,775	1,840	1,920	2,010	2,110	2,210	2,320	2,440	2,560	2,680	2,810	6.2%	6.8%
	Volume	45	47	48	50	52	54	57	58	60	62	65	68	71	74	5.2%	6.0%
Total	Value	12,913	12,913	14,076	15,129	15,892	17,043	18,300	19,794	21,260	23,190	23,472	24,820	26,309	27,830	6.2%	7.2%
	Volume	350	350	380	400	420	470	500	550	600	650	670	720	770	830	6.2%	7.2%

## Section 08

# Global Anti-counterfeit Pharmaceuticals Packaging Market Analysis By Regions



# Global Anti Counterfeit Pharma Packaging Market Analysis, by Region



### NORTH AMERICA

North America represents more than quarter of the total market. The North America anti-counterfeit pharmaceutical packaging market is estimated to be valued at USD 28.29 Bn in 2022 and expected to reach USD 47.28 Bn by the end of 2031. The region is anticipated to witness with an incremental opportunity of USD 18.99 Bn during the forecast period.



### LATIN AMERICA

Nearly 14% of the global market is estimated Latin America. The region is anticipated to witness with an incremental opportunity of USD 4.4 Bn during the forecast period. The Latin America anti-counterfeit pharmaceutical packaging market is estimated to be valued at USD 4.42 Bn in 2022 and expected to reach USD 6.79 Bn by the end of 2031.



### EUROPE

The Europe anti-counterfeit pharmaceutical packaging market is estimated to be valued at USD 25.28 Bn in 2022 and expected to reach USD 47.72 Bn by the end of 2031. The region is anticipated to witness with an incremental opportunity of USD 22.44 Bn during the forecast period.



### ASIA PACIFIC (APAC)

Asia Pacific is experiencing rapid growth during the forecast period. The Asia Pacific anti-counterfeit pharmaceutical packaging market is estimated to be valued at USD 28.9 Bn in 2022 and expected to reach USD 59.22 Bn by the end of 2031.



### MIDDLE EAST & AFRICA

The Middle East & Africa anti-counterfeit pharmaceutical packaging market is estimated to be valued at USD 2.4 Bn in 2022 and expected to reach USD 4.8 Bn by the end of 2031. The region is anticipated to witness with an incremental opportunity of USD 2.4 Bn during the forecast period.

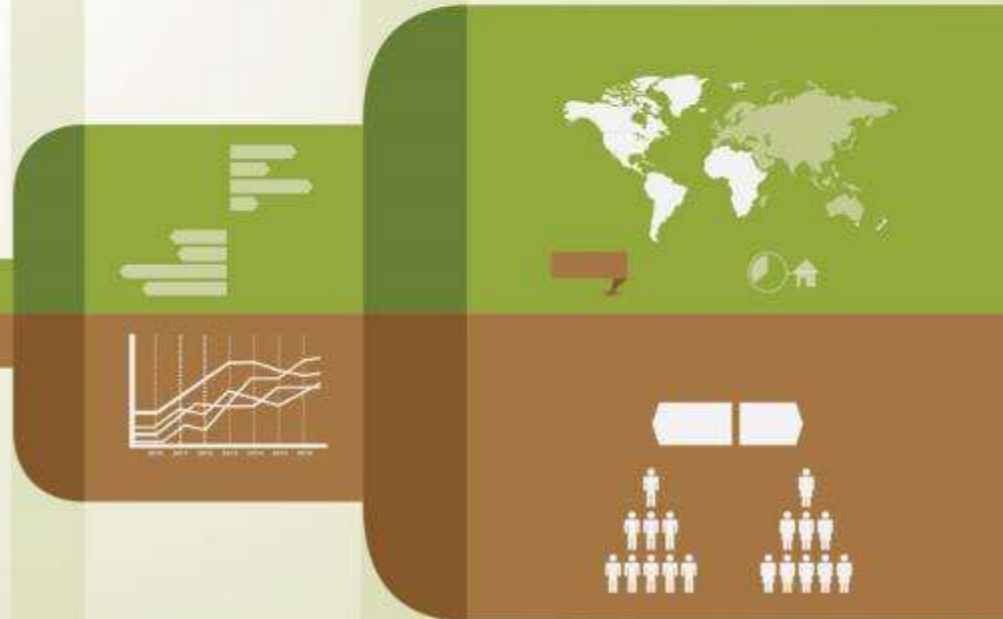
# Global Anti Counterfeit Pharma Packaging Market, by Region

Table 08: Global Anti Counterfeit Pharma Packaging Market Value (USD Bn) and Volume (Bn Units), Historical & Forecast, by Region, 2018-2027 (E)

		2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035		
North America	Value	2627	2675	2736	2798	2862	2928	2996	3066	3138	3212	3288	3366	3446	3528	3612	3698	3786	3876	3968	
	Volume	262	267	273	279	286	292	299	306	313	321	328	336	344	352	361	369	378	387	396	405
Europe	Value	2288	2340	2398	2458	2520	2584	2650	2718	2788	2858	2930	3004	3080	3158	3238	3320	3404	3490	3578	3668
	Volume	229	234	239	245	252	258	265	271	278	285	293	300	308	315	323	332	340	349	357	366
Asia	Value	2180	2238	2300	2366	2434	2504	2576	2650	2726	2804	2884	2966	3050	3136	3224	3314	3406	3500	3596	3694
	Volume	218	223	230	236	243	250	257	265	272	280	288	296	305	313	322	331	340	350	359	369
Latin America	Value	1280	1338	1398	1458	1520	1584	1650	1718	1788	1858	1930	2004	2080	2158	2238	2320	2404	2490	2578	2668
	Volume	128	133	139	145	152	158	165	171	178	185	193	200	208	215	223	232	240	249	257	266
Africa	Value	178	183	189	195	201	207	213	219	225	231	237	243	249	255	261	267	273	279	285	291
	Volume	17.8	18.3	18.9	19.5	20.1	20.7	21.3	21.9	22.5	23.1	23.7	24.3	24.9	25.5	26.1	26.7	27.3	27.9	28.5	29.1
Total	Value	8623	8824	9036	9258	9492	9740	10000	10272	10556	10852	11160	11480	11812	12156	12512	12880	13260	13652	14056	14472
	Volume	862	882	903	925	949	974	1000	1027	1055	1085	1116	1148	1181	1215	1251	1288	1326	1365	1405	1447

## Section 09

# North America Anti-counterfeit Pharmaceuticals Packaging Market Analysis



# North America Anti Counterfeit Pharma Packaging Market: Snapshot

North America represents more than quarter of the total market share in terms of value in 2019

## MARKET SNAPSHOT



# XX



### Key Takeaways

- 1. Growth is primarily attributed to North America being the largest pharmaceutical and biological research hub, which exports life-saving products across all geographies. Furthermore, companies are making significant investments in R&D which is likely to boost growth of the anti-counterfeit pharmaceutical packaging market in the region.
- 2. The North America is projected to witness an incremental opportunity of US\$ XX Bn during the forecast period.
- 3. United States represents around 80% of the total market share by value during 2019-27.



# North America Anti Counterfeit Pharma Packaging Market, by Country

Table 25: North America Anti Counterfeit Pharma Packaging Market Value (\$B) and Volume (Bn Units), Historical & Forecast, by Country, 2014-2021 & 2022-2027 (E)

Country	Metric	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	CAGR	CAGR
		Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume
U.S.	Value	\$1,289	\$2,499	\$3,738	\$5,059	\$6,398	\$7,760	\$9,146	\$10,566	\$12,020	\$13,508	\$15,029	\$16,584	\$18,174	\$19,799	8.8%	7.4%
	Volume	481.1	1,048.4	1,591.2	2,215.4	2,831.3	3,449.7	4,071.7	4,697.9	5,328.2	5,962.6	6,599.9	7,240.2	7,883.4	8,529.4	8.7%	7.2%
Canada	Value	\$,388	\$,445	\$,509	\$,578	\$,647	\$,716	\$,786	\$,857	\$,928	\$,999	\$,1,072	\$,1,147	\$,1,222	\$,1,297	4.3%	3.7%
	Volume	38.4	41.1	43.3	45.9	48.9	51.9	54.9	57.7	60.5	63.3	66.1	68.9	71.7	74.5	3.7%	3.4%
Total	Value	\$1,677	\$2,944	\$4,247	\$5,637	\$7,045	\$8,476	\$9,932	\$11,423	\$12,948	\$14,507	\$16,101	\$17,731	\$19,398	\$21,096	8.9%	7.4%
	Volume	519.5	1,089.5	1,634.5	2,265.3	2,920.2	3,569.4	4,221.4	4,875.6	5,529.7	6,183.1	6,836.1	7,489.1	8,142.1	8,795.1	8.7%	7.2%



# North America Anti Counterfeit Pharma Packaging Market, by Packaging Format

Table 06: North America Anti Counterfeit Pharma Packaging Market Value (USD Mn) and Volume (Mn Units), Historical & Forecast, by Packaging Format, 2014(2Q) – 2027(2Q)

Year	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	CAGR	CAGR
Value \$ Mn	1000	1050	1100	1150	1200	1250	1300	1350	1400	1450	1500	1550	1600	1650	6.0%	7.0%
Volume Mn Units	201.9	207.9	213.9	219.9	225.9	231.9	237.9	243.9	249.9	255.9	261.9	267.9	273.9	279.9	6.0%	6.9%
Value \$ Trillion	0.001	0.001	0.001	0.001	0.001	0.001	0.001	0.001	0.001	0.001	0.001	0.001	0.001	0.001	0.7%	0.2%
Volume Mn Units	71.4	73.1	74.8	76.5	78.2	79.9	81.6	83.3	85.0	86.7	88.4	90.1	91.8	93.5	7.0%	8.0%
Value \$ Mn	600	630	660	690	720	750	780	810	840	870	900	930	960	990	6.0%	7.0%
Volume Mn Units	121.1	123.9	126.7	129.5	132.3	135.1	137.9	140.7	143.5	146.3	149.1	151.9	154.7	157.5	6.7%	7.6%
Value \$ Mn	300	315	330	345	360	375	390	405	420	435	450	465	480	495	6.0%	6.9%
Volume Mn Units	60.7	61.9	63.1	64.3	65.5	66.7	67.9	69.1	70.3	71.5	72.7	73.9	75.1	76.3	6.0%	6.9%
Value \$ Mn	400	420	440	460	480	500	520	540	560	580	600	620	640	660	6.0%	6.9%
Volume Mn Units	81.8	83.9	86.0	88.1	90.2	92.3	94.4	96.5	98.6	100.7	102.8	104.9	107.0	109.1	6.0%	6.9%
Value \$ Mn	1,700	1,800	1,900	2,000	2,100	2,200	2,300	2,400	2,500	2,600	2,700	2,800	2,900	3,000	7.0%	8.0%
Volume Mn Units	34.1	34.9	35.7	36.5	37.3	38.1	38.9	39.7	40.5	41.3	42.1	42.9	43.7	44.5	7.0%	7.7%
Value \$ Mn	10,000	10,500	11,000	11,500	12,000	12,500	13,000	13,500	14,000	14,500	15,000	15,500	16,000	16,500	6.0%	7.0%
Volume Mn Units	200.0	206.7	213.4	220.1	226.8	233.5	240.2	246.9	253.6	260.3	267.0	273.7	280.4	287.1	6.7%	7.6%

# North America Anti Counterfeit Pharma Packaging Market, by End Use Applications

Table 07: North America Anti Counterfeit Pharma Packaging Market Value (USD Mn) and Volume (Mn Units), Historical & Forecast, by End Use Applications, 2018-2021 – 2027-27

End Use Application	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	CAGR	CAGR	
Pharmaceutical	Value	5,700	6,300	6,800	7,200	7,600	8,000	8,400	8,800	9,200	9,600	10,000	10,400	10,800	11,200	11,600	7.7%	8.2%
	Volume	261.9	276.8	288.1	295.9	306.9	316.9	326.8	335.1	341.2	349.8	356.9	363.2	369.8	376.8	383.8	7.6%	7.9%
Medical Devices	Value	8,200	8,800	9,400	10,000	10,600	11,200	11,800	12,400	13,000	13,600	14,200	14,800	15,400	16,000	16,600	8.0%	7.7%
	Volume	226.8	231.8	237.3	241.8	246.3	251.2	256.7	261.8	266.9	271.9	276.9	281.9	286.9	291.9	297.3	8.0%	7.9%
Medical Research	Value	6,800	7,300	7,800	8,300	8,800	9,300	9,800	10,300	10,800	11,300	11,800	12,300	12,800	13,300	13,800	8.0%	8.0%
	Volume	221.2	226.9	231.9	237.4	242.9	248.8	254.9	261.3	267.8	273.2	278.9	284.7	290.9	297.3	303.8	8.0%	8.0%
Total	Value	20,700	22,400	23,900	25,500	26,900	28,200	29,400	30,600	31,800	33,000	34,200	35,400	36,600	37,800	39,000	8.0%	7.9%
	Volume	589.9	605.7	626.3	644.0	664.1	686.9	711.8	738.8	768.1	799.8	833.6	869.7	908.6	949.7	993.8	8.0%	7.9%

# North America Anti Counterfeit Pharma Packaging Market, by Technology

Table 07: North America Anti Counterfeit Pharma Packaging Market Value (USD Mn) Historical & Forecast, by Technology - 2018-2027 (USD Mn)

Technology	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	CAGR	CAGR
RFID	1000	1100	1200	1300	1400	1500	1600	1700	1800	1900	2000	2100	2200	2300	2400	6.0%	6.0%
Security Ink & Coating	1000	1100	1200	1300	1400	1500	1600	1700	1800	1900	2000	2100	2200	2300	2400	6.0%	7.0%
Security Ink	1000	1100	1200	1300	1400	1500	1600	1700	1800	1900	2000	2100	2200	2300	2400	7.0%	7.0%
Integrations	1000	1100	1200	1300	1400	1500	1600	1700	1800	1900	2000	2100	2200	2300	2400	6.0%	6.0%
Other Integrations	1000	1100	1200	1300	1400	1500	1600	1700	1800	1900	2000	2100	2200	2300	2400	5.0%	7.0%
Total	1000	1100	1200	1300	1400	1500	1600	1700	1800	1900	2000	2100	2200	2300	2400	6.7%	7.0%

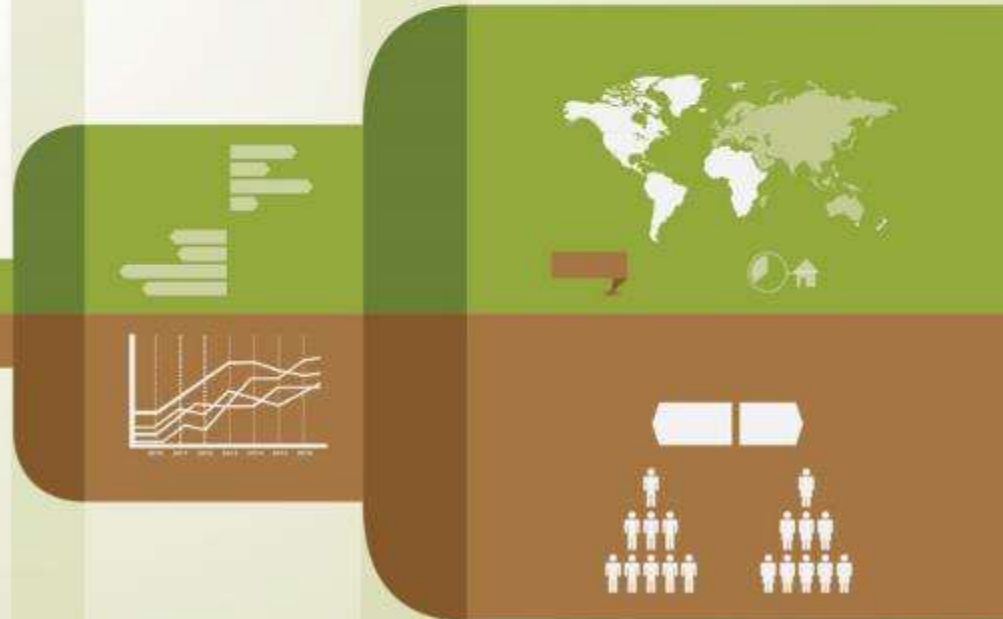
# Regional Intensity Mapping : North America

Company Name	Business Model	North America	
		U.S.	Canada
Klöckner Pentaplast Group	Manufacturer/Distributor	Dark Blue	Teal
Ardagh Group S.A.	Manufacturer/Distributor	Dark Blue	Teal
Nipro Corporation	Manufacturer/Distributor	Dark Blue	Teal
Stevanato Group	Manufacturer/Distributor	Dark Blue	Cyan
Alien Technology Corp	Manufacturer/Distributor	Dark Blue	Cyan
SICPA Holdings	Manufacturer/Distributor	Dark Blue	Dark Blue
CCL Industries Inc.	Manufacturer/Distributor	Dark Blue	Dark Blue
Authentix Inc.	Manufacturer/Distributor	Dark Blue	Cyan
TruTag Technologies, Inc.	Manufacturer/Distributor	Dark Blue	Cyan
Zebra Technologies Corp	Manufacturer/Distributor	Dark Blue	Teal

Source: FMI, 2022

## Section 10

# Latin America Anti-counterfeit Pharmaceuticals Packaging Market Analysis



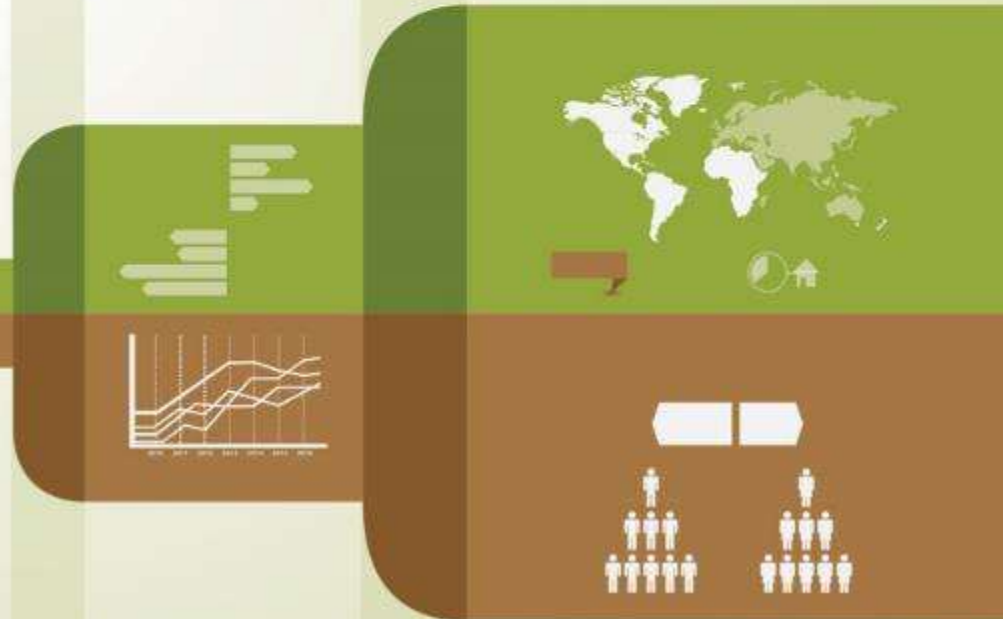
# Latin America Anti Counterfeit Pharma Packaging Market, by Country

Table 08: Latin America Anti Counterfeit Pharma Packaging Market Value (US\$ Mn) and Volume (Bn Units), Historical & Forecast, by Country, 2014 (H) – 2027 (F)

		2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027
Brazil	Value	1,100	1,200	1,300	1,400	1,500	1,600	1,700	1,800	1,900	2,000	2,100	2,200	2,300	2,400
	Volume	47.8	51.1	54.8	58.8	63.3	68.4	74.2	80.7	87.8	95.5	103.7	112.5	121.8	131.6
Mexico	Value	300	320	340	360	380	400	420	440	460	480	500	520	540	560
	Volume	25.2	26.2	27.2	28.2	29.2	30.2	31.2	32.2	33.2	34.2	35.2	36.2	37.2	38.2
Argentina	Value	200	210	220	230	240	250	260	270	280	290	300	310	320	330
	Volume	16.7	17.3	17.9	18.5	19.1	19.7	20.3	20.9	21.5	22.1	22.7	23.3	23.9	24.5
Peru	Value	100	105	110	115	120	125	130	135	140	145	150	155	160	165
	Volume	8.5	8.8	9.1	9.4	9.7	10.0	10.3	10.6	10.9	11.2	11.5	11.8	12.1	12.4
Chile	Value	80	85	90	95	100	105	110	115	120	125	130	135	140	145
	Volume	6.8	7.1	7.4	7.7	8.0	8.3	8.6	8.9	9.2	9.5	9.8	10.1	10.4	10.7
Colombia	Value	150	160	170	180	190	200	210	220	230	240	250	260	270	280
	Volume	12.5	13.1	13.7	14.3	14.9	15.5	16.1	16.7	17.3	17.9	18.5	19.1	19.7	20.3
Venezuela	Value	50	55	60	65	70	75	80	85	90	95	100	105	110	115
	Volume	4.2	4.5	4.8	5.1	5.4	5.7	6.0	6.3	6.6	6.9	7.2	7.5	7.8	8.1
Total	Value	2,000	2,100	2,200	2,300	2,400	2,500	2,600	2,700	2,800	2,900	3,000	3,100	3,200	3,300
	Volume	85.7	90.9	96.2	101.5	106.8	112.1	117.4	122.7	128.0	133.3	138.6	143.9	149.2	154.5

## Section 12

# Europe Anti-counterfeit Pharmaceuticals Packaging Market Analysis



# Europe Anti Counterfeit Pharma Packaging Market, by Country

**Table 11: Europe Anti Counterfeit Pharma Packaging Market Value (US\$ Mn) and Volume (Bn Units), Historical & Forecast, by Country, 2014 (H) – 2027 (F)**

		2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	CAGR	CAGR
Germany	Value	4,228	4,488	4,768	5,077	5,426	5,815	6,274	6,812	7,349	7,907	8,496	9,117	9,770	10,455	8.2%	8.2%
	Volume	288.9	325.2	362.9	402.9	445.9	491.7	540.2	591.4	645.9	703.9	765.2	830.2	898.9	971.2	8.2%	8.2%
Italy	Value	2,292	2,718	3,198	3,747	4,366	5,055	5,827	6,684	7,637	8,696	9,861	11,134	12,517	14,010	8.7%	8.2%
	Volume	88.7	95.9	103.9	112.9	121.9	131.9	141.9	151.9	161.9	171.9	181.9	191.9	201.9	211.9	8.2%	8.2%
France	Value	4,228	4,488	4,768	5,077	5,426	5,815	6,274	6,812	7,349	7,907	8,496	9,117	9,770	10,455	7.2%	7.2%
	Volume	82.9	88.2	93.5	98.8	104.1	109.4	114.7	120.0	125.3	130.6	135.9	141.2	146.5	151.8	7.2%	7.2%
UK	Value	2,886	3,086	3,286	3,487	3,688	3,889	4,090	4,291	4,492	4,693	4,894	5,095	5,296	5,497	6.2%	6.2%
	Volume	92.2	98.5	104.8	111.1	117.4	123.7	130.0	136.3	142.6	148.9	155.2	161.5	167.8	174.1	6.2%	6.2%
Spain	Value	2,278	2,712	3,147	3,582	4,017	4,452	4,887	5,322	5,757	6,192	6,627	7,062	7,497	7,932	7.8%	8.2%
	Volume	82.9	88.7	94.5	100.3	106.1	111.9	117.7	123.5	129.3	135.1	140.9	146.7	152.5	158.3	7.8%	8.2%
Rest of Europe	Value	2,886	3,086	3,286	3,487	3,688	3,889	4,090	4,291	4,492	4,693	4,894	5,095	5,296	5,497	7.2%	8.2%
	Volume	271.2	288.4	305.6	322.8	340.0	357.2	374.4	391.6	408.8	426.0	443.2	460.4	477.6	494.8	7.2%	8.2%



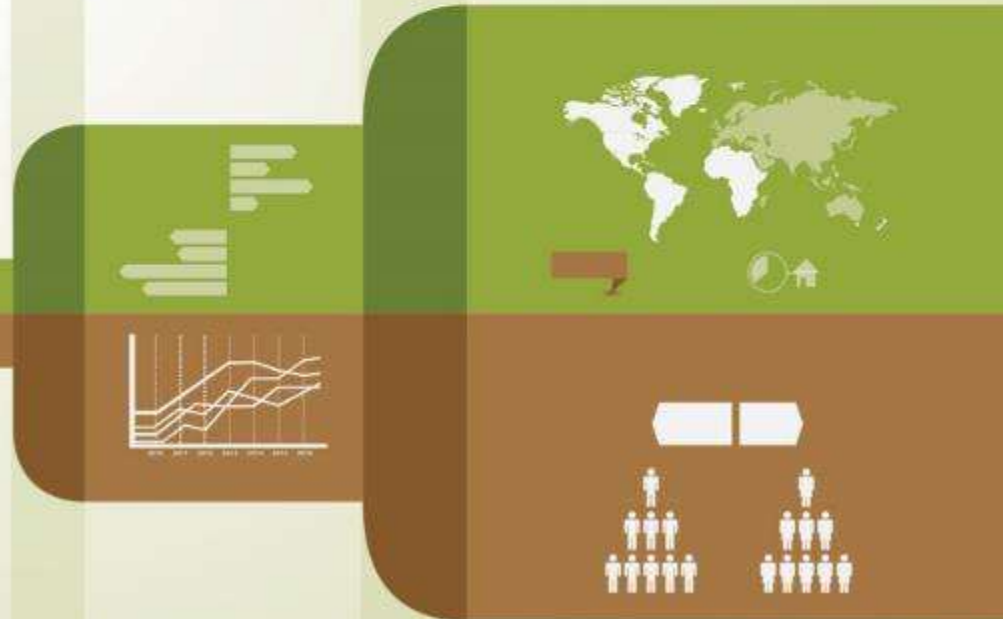
# Europe Anti Counterfeit Pharma Packaging Market, by Country

Table 11: Europe Anti Counterfeit Pharma Packaging Market Value (US\$ Mn) and Volume (Bn Units), Historical & Forecast, by Country, 2014 (H) – 2027 (F)

		2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	CAGR	CAGR
Germany	Value	88	98	1,057	1,098	1,138	1,188	1,232	1,280	1,330	1,380	1,430	1,480	1,530	1,580	8.4%	8.2%
	Volume	25.8	26.3	26.8	26.7	26.2	26.5	26.8	26.2	26.5	26.2	25.3	26.5	26.2	26.4	8.4%	8.2%
France	Value	1,208	1,268	1,477	1,488	1,705	1,876	2,050	2,217	2,405	2,605	2,875	3,205	3,605	4,005	8.8%	8.8%
	Volume	35.8	35.8	36.3	35.3	35.3	35.3	35.3	37.7	35.2	35.8	35.3	35.3	35.4	35.7	8.7%	8.7%
UK	Value	452	478	508	507	507	508	508	1,008	1,112	1,208	1,305	1,405	1,505	1,605	8.2%	8.2%
	Volume	17.8	17.7	18.3	18.3	18.8	18.8	18.3	18.3	18.3	18.3	18.7	18.2	18.8	18.2	8.2%	7.8%
Spain	Value	475	508	508	452	508	508	1,007	1,105	1,207	1,308	1,408	1,508	1,708	1,808	8.8%	8.2%
	Volume	17.8	18.2	18.8	18.2	18.8	18.8	17.3	18.8	18.8	18.8	18.8	18.3	18.8	18.8	8.8%	8.8%
Total	Value	27,878	28,278	28,382	28,388	28,488	28,588	27,888	28,488	28,238	28,388	27,877	28,388	28,275	28,757	7.8%	8.2%
	Volume	887.8	888.8	888.8	888.8	888.8	888.8	788.8	778.8	887.8	888.7	888.8	888.8	888.8	888.8	7.8%	8.2%

## Section 12

# APAC Anti-counterfeit Pharmaceuticals Packaging Market Analysis



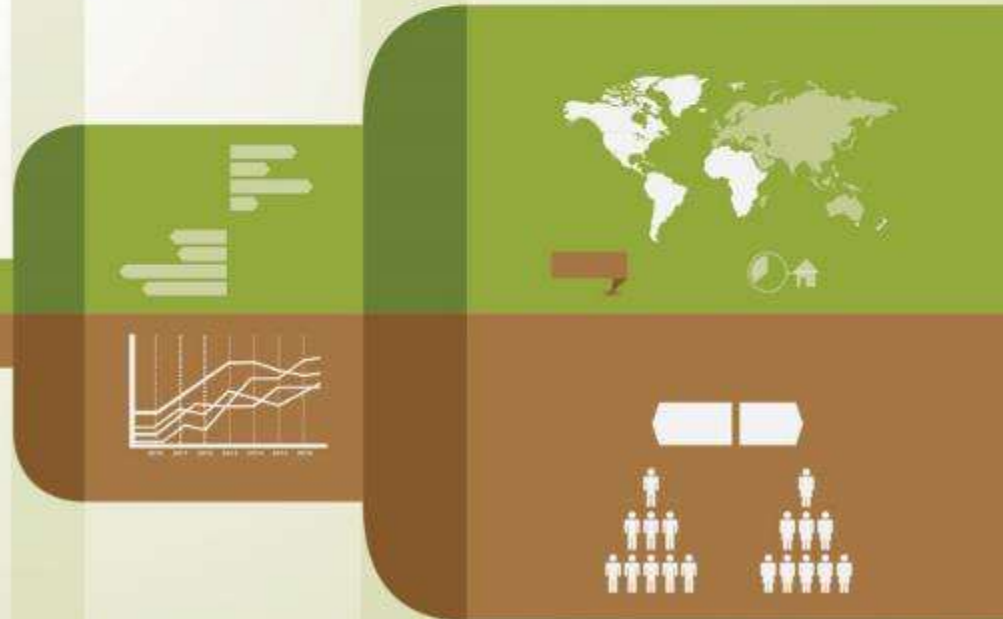
# APAC Anti Counterfeit Pharma Packaging Market, by Country

Table 14: APAC Anti Counterfeit Pharma Packaging Market Value (US\$ Mn) and Volume (Bn Units), Historical & Forecast, by Country, 2014 (H) – 2027 (F)

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	CAGR	CAGR
<b>China</b>	1000	1100	1200	1300	1400	1500	1600	1700	1800	1900	2000	2100	2200	2300	8.5%	10.5%
<b>India</b>	1200	1300	1400	1500	1600	1700	1800	1900	2000	2100	2200	2300	2400	2500	8.0%	10.0%
<b>Japan</b>	800	850	900	950	1000	1050	1100	1150	1200	1250	1300	1350	1400	1450	6.5%	8.5%
<b>South Korea</b>	700	750	800	850	900	950	1000	1050	1100	1150	1200	1250	1300	1350	6.0%	8.0%
<b>Australia</b>	500	550	600	650	700	750	800	850	900	950	1000	1050	1100	1150	5.5%	7.5%
<b>Other APAC</b>	1000	1100	1200	1300	1400	1500	1600	1700	1800	1900	2000	2100	2200	2300	8.5%	10.5%
<b>APAC</b>	5500	6000	6500	7000	7500	8000	8500	9000	9500	10000	10500	11000	11500	12000	7.5%	9.5%

## Section 13

# MEA Anti-counterfeit Pharmaceuticals Packaging Market Analysis



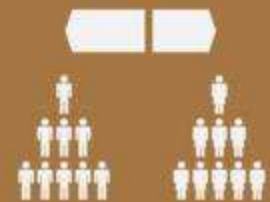
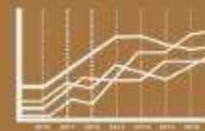
# MEA Anti Counterfeit Pharma Packaging Market, by Country

Table 17: MEA Anti Counterfeit Pharma Packaging Market Value (US\$ Mn) and Volume (Bn Units), Historical & Forecast, by Country, 2014 (H) – 2027 (F)

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	CAGR	CAGR
<b>MEA</b>																
Value	25.2	25.2	27.5	29.9	32.9	35.9	39.4	43.4	47.5	52.0	57.2	62.9	69.4	76.5	9.0%	9.0%
Volume	11.8	11.7	12.6	13.7	14.7	15.7	16.9	18.2	19.6	21.1	22.7	24.4	26.2	28.1	7.8%	11.1%
<b>UAE</b>																
Value	5.2	5.2	5.8	6.3	7.0	7.7	8.5	9.4	10.3	11.3	12.4	13.6	14.9	16.3	11.7%	9.8%
Volume	2.1	2.1	2.2	2.3	2.4	2.5	2.6	2.7	2.8	2.9	3.0	3.1	3.2	3.3	9.0%	10.0%
<b>Qatar</b>																
Value	20.0	20.0	21.7	23.6	25.9	28.2	30.9	34.0	37.2	40.7	44.9	49.3	54.5	60.2	10.0%	11.0%
Volume	9.7	9.6	10.4	11.4	12.3	13.2	14.2	15.2	16.2	17.2	18.2	19.2	20.2	21.2	11.0%	11.0%
Volume	1.1	1.1	1.2	1.3	1.4	1.5	1.6	1.7	1.8	1.9	2.0	2.1	2.2	2.3	9.0%	9.0%
<b>Other MEA</b>																
Value	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	0.0%	0.0%
Volume	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0%	0.0%
<b>Total</b>																
Value	25.2	25.2	27.5	29.9	32.9	35.9	39.4	43.4	47.5	52.0	57.2	62.9	69.4	76.5	9.0%	9.0%
Volume	11.8	11.7	12.6	13.7	14.7	15.7	16.9	18.2	19.6	21.1	22.7	24.4	26.2	28.1	7.8%	11.1%

## Section 14

# Market Structure Analysis



## Company Share Analysis (2021A)

### Company Share by Packaging Formats

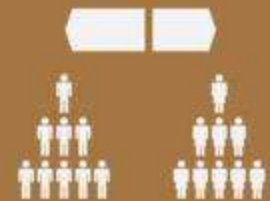
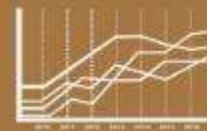
Company Name	Market Share (100%= US\$ XX Bn)
Schott AG	~X% - X%
Gerresheimer AG	~X% - X%
Klockner Pentaplast Group	~X% - X%
Ardagh Group S.A	~X% - X%
West Pharmaceutical Services, Inc.	~X% - X%
Nipro Corporation	~X% - X%
Rest of Players	~X% - X%

### Company Share by Technology

Company Name	Market Share (100%= US\$ XX Bn)
3M	~X% - X%
Avery Dennison Corp.	~X% - X%
Alien Technology	~X% - X%
Authentix	~X% - X%
SICPS Holdings	~X% - X%
Rest of Players	~X% - X%

## Section 15

# Competition Analysis


















# Technology Mapping

Anti-counterfeit Pharmaceutical Suppliers	MFD	Security Inks & Coatings	Security Printing & Graphics	Holograms	Other Branding
List of Suppliers	Technology				
Altec Technology	✓				
ATI Security Label Systems				✓	✓
Avery Dennison MFD	✓				
DSB			✓		
Ingersoll	✓				✓
IQAPL		✓	✓	✓	✓
Schreiner Performance	✓	✓	✓	✓	
SECMA Security Solutions				✓	
U-NICA Group				✓	

# Company Dashboard

	Revenue	Packaging Format	Geographic Region	Technology Used	Strategy
<b>Schott AG</b>	USD 2.25 Billion	Amorphous, Crystals	North America, Asia	Barcode, Holograms	 
<b>Corning Inc</b>	USD 2.22 Billion	Amorphous, Glass, Crystals	North America, Europe, Latin America	Barcode & QR Codes	  
<b>Wohler Packaging Group</b>	USD 2.02 Billion	Others	Europe, Asia Pacific, North America	Holograms	 
<b>Ardagh Group S.A</b>	USD 1.2 Billion	Wood-based	North America, Europe, Asia	Holograms, near-visualization	  
<b>Hopac Corporation</b>	USD 1.05 Billion	Wood Pulp, recycled pulp	Europe, Asia Pacific	Barcode	 



 Revenue

 Packaging Format

 Geographic Region

Source: FMI 2019

# Alpvision SA: Company Profile

	<b>Company Name</b> <b>Alpvision SA</b>
	<b>Established</b> <b>2001</b>
	<b>Headquarter</b> <b>Switzerland</b>
	<b>Revenue (2021)</b> <b>~US\$ 5-8 Mn</b>
	<b>Employee Strength</b> <b>~200-250</b>
	<b>Key Management</b> <b>Fred Jordan (CEO)</b>
	<b>Website</b> <b><a href="http://www.alpvision.com">www.alpvision.com</a></b>

Source: Company Website

## COMPANY DESCRIPTION

- Alpvision is an evolving company in digital technologies for product authentication and counterfeit protection.
- The company caters mainly to the industries such as Pharmaceuticals, Tobacco, Government, Footwear, and Wine & Spirits.
- The company offers its digital invisible anti-counterfeit and product authentication solutions to major globally recognized companies.
- Alpvision's digital invisible technologies can be functional to a variety of branded products, ranging from cartons, blisters, labels, leaflets, and INKS to molded parts, such as bottles and caps, and electrical appliances.
- Alpvision currently protects millions of value documents worldwide from forgery, tampering, and counterfeiting.

# Alpvision SA: Key Developments

AlpVision joined IACC (International Anti-Counterfeiting Coalition)

AlpVision release overt brand protection security features based on 3D topography.

Recently released version 2.0 of the Brand Monitoring System (BMS) will allow the companies to control and monitor their brand protection activities.

AlpVision launched Cryptoglyph that is applicable to metallic closures

## Product Portfolio

Industries Served
Pharmaceuticals
Tobacco
Wine & Spirits
Other Industries

Solutions Offered
Brand Protection
Document Security
Custom Services

## Geographic Presence



# Alpvision SA: SWOT Analysis & Strategic Overview

S

- The products are accepted by International Anti-Counterfeiting Coalition (IACC).
- Cryptoglyph is the prominent product, giving competitive edge over its competitors.

W

- Lesser penetration in the global market.
- Limited technically advanced product basket.

O

- With increase in imitated medical, consumer, and others products across the global market, the company can target the emerging countries who are majorly affected by the copied products.

T

- Market leaders leading with the latest technology have enough potential to acquire the companies.

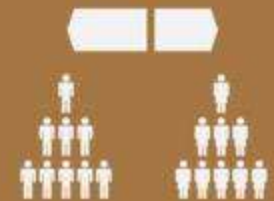
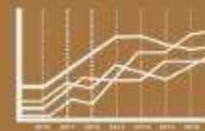
### STRATEGIC OVERVIEW

Alpvision is evolving with time by implementing latest technology to help its customer better

- *Implementation of Artificial Intelligence (AI), especially in fingerprint approach, validates multipart objects such as consumer appliances, or essential items like wood/ leather.*

## Section 16

# Assumptions and Acronyms Used



# Assumptions & Acronyms Used

## Assumptions

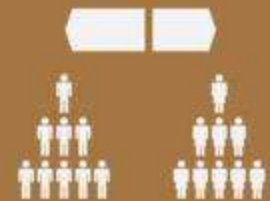
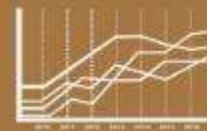
- The analysis of value & volume by anti-counterfeit pharma packaging source segment is the quantitative equivalent of anti-counterfeit pharma packaging market.
- Inflation has not been considered to arrive at market revenue at subsequent levels of market segmentation
- Weighted average prices in US\$/Unit have been considered for each anti-counterfeit pharma packaging source per ton to arrive at market size
- Market splits by packaging formats and preference of have been deduced from survey and primary research
- At instances, the market shares may not arrive to the total due to rounding off.

## Acronyms

Abbreviation	Description
CAGR	Compound Annual Growth Rate
Mn	Million
Bn	Billion
MEA	Middle East and Africa
EMEA	Europe, Middle East & Africa
Y-o-Y	Year on Year
FAO	Food and Agriculture Organization

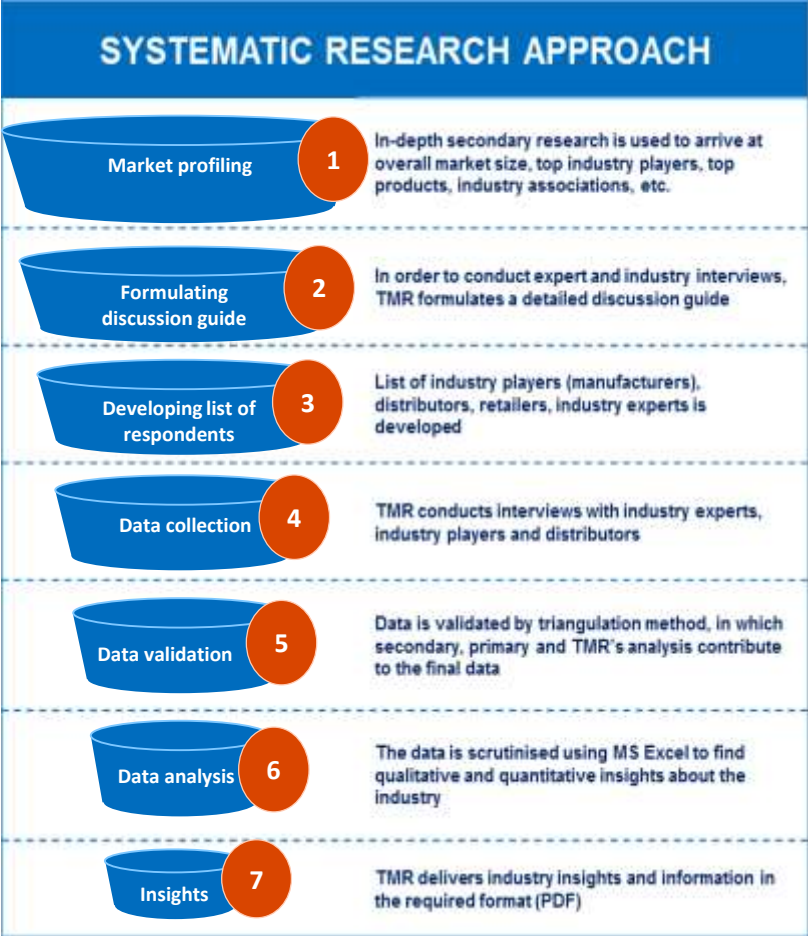
## Section 17

# Research Methodology

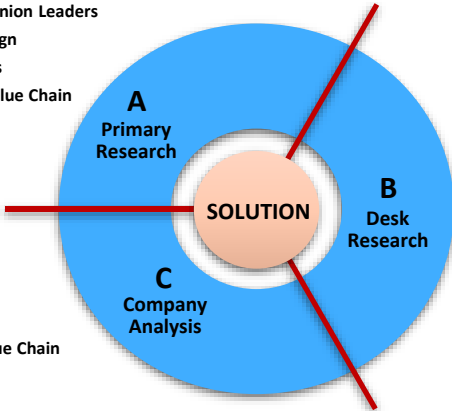




# Research Methodology (1/2)



- Identifying Key Opinion Leaders
- Questionnaire Design
- In-depth Interviews
- Coverage across Value Chain



- Market Participants
- Key Strengths
- Product Portfolio
- Mapping as per Value Chain
- Key Focus Segments

- Key Industry Experts
- Channel Study
- Developments
- Market Dynamics
- Products
- Conclusions

- | Primary Research                    |
|-------------------------------------|
| <input type="checkbox"/> LinkedIn   |
| <input type="checkbox"/> ZoomInfo   |
| <input type="checkbox"/> Salesforce |
| <input type="checkbox"/> Hoovers    |
| <input type="checkbox"/> OneSource  |

- | Secondary Research                              |
|---|
| <input type="checkbox"/> Company Websites       |
| <input type="checkbox"/> Company Annual Reports |
| <input type="checkbox"/> White End Loads        |
| <input type="checkbox"/> Financial Reports      |
| <input type="checkbox"/> OICA                   |

- | Paid Publications                  |
|------------------------------------|
| <input type="checkbox"/> Factiva   |
| <input type="checkbox"/> GBI       |
| <input type="checkbox"/> Genios    |
| <input type="checkbox"/> Meltwater |

# Research Methodology (1/2)

## Secondary Research

- Anti-counterfeit pharma packaging Sales & Forecast across Geographies
- anti-counterfeit pharma packaging Sales Volumes and Historical Trends
- Global anti-counterfeit pharma packaging Market Trends across Geographies
- Global anti-counterfeit pharma packaging Market Overview by Key Manufacturers
- Global anti-counterfeit pharma packaging Market Growth Projections
- Global anti-counterfeit pharma packaging Market Growth Projections
- Average Pricing Trend Based on packaging format
- Key anti-counterfeit pharma packaging Manufacturers Portfolio
- Comparison among various anti-counterfeit pharma packaging source, anti-counterfeit pharma packaging ingrade, End-user industry
- Consumer preference

## Key Sources Referred

- Industry Association Publications
- Annual Reports, Publications, Presentations of anti-counterfeit pharma packaging manufacturers
- World Bank, IMF, EPA, trademap, Packaging Digest, Pack World, FPA, UN Comtrade and Government Websites

## Primary Research

- Present and Future Scenario
- Major Drivers, Restraints, Trends and Opportunities in anti-counterfeit pharma packaging Market
- Key Challenges Faced by Manufacturers and Customers
- Key Winning Strategies Followed by anti-counterfeit pharma packaging Manufacturers
- Market Segmentation Criterion
- Anti-counterfeit pharma packaging formats, technology, end use applications. End-user industry Volume/Value Split
- Market Scenario in Developed and Developing Economies
- Anticipated Growth Projections

## Key Sources

- Industry Experts and Association Members
- Raw material Suppliers
- anti-counterfeit pharma packaging Manufacturers & Distributors

## Data Analysis

- End Use Industry growth and Market Forecast during the forecast period
- Macroeconomic factor analysis
- Average consumption of anti-counterfeit pharma packaging market Historical Trend Analysis

## Market Size

- Market Volume (Bn Units) and Value (US\$ Mn) Estimation
- Average Country Prices by packaging formats. Utilized to Arrive at Revenue Estimate
- Factor Analysis Made for Projections
- CAGR and Y-o-Y Growth Used to Arrive at Market Projections

## Data Reporting

- Qualitative Data & Facts
- Quantitative Data
- Market Dynamics

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**[sales@futuremarketinsights.com](mailto:sales@futuremarketinsights.com)**

