

Anti-counterfeit Packaging Market to Reach USD 536.0 Billion by 2035 at 11.2% CAGR

North America led with 35.9% revenue share in 2025 on the back of interoperable verification mandates

GA, UNITED STATES, September 17, 2026 /EINPresswire.com/ -- The [anti-counterfeit packaging market](https://www.einpresswire.com/anti-counterfeit-packaging-market) closed 2025 at USD 185.8 Billion and is projected to reach USD 536.0 Billion by 2035, expanding at a CAGR of 11.2% from 2026 to 2035, according to Market Research Future®. The market is expected to reach USD 206.6 Billion in 2026 as pharmaceutical serialization, e-commerce distribution, product authentication and connected packaging contribute to demand for technologies that help identify and verify products across supply chains.



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Serialization, connected packaging and digital product identity are reshaping how brands approach product authentication and supply-chain visibility”

Market Research Future

The market encompasses technologies including trace and track systems, overt and covert security features, tamper evidence and forensic markers. It also includes serialization codes, barcodes and 2D carriers, holograms, security seals, RFID and NFC tags, as well as security-focused labels, films, closures, cartons, inks and coatings.

Market Growth Driven by Product-Level Identity

Anti-counterfeit packaging is increasingly moving beyond traditional visual security features toward layered

authentication systems that combine physical packaging characteristics with digital identity. Serialization records, machine-readable carriers, RFID and NFC technologies and digital verification systems are allowing businesses to associate individual products or packages with identifiable data.

Pharmaceutical supply chains remain an important source of demand. Serialization and

verification requirements require manufacturers and other supply-chain participants to maintain product-level identification and electronic transaction information. These requirements create recurring demand for coding, verification, aggregation and related packaging infrastructure.

E-commerce is also changing packaging authentication requirements. Products can move through multiple distribution channels before reaching consumers, increasing the need for serialized identification and tamper indication at the individual-unit and shipping-pack levels.

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Key Trends Shaping the Market Pharmaceutical Serialization and Verification

Healthcare and pharmaceuticals accounted for 27.9% of market revenue in 2025, supported by serialization requirements and product verification needs. Trace and track technologies accounted for 29.9% of market revenue in 2025, reflecting the established role of serialization infrastructure across regulated supply chains.

The continuing development of electronic verification systems is encouraging packaging manufacturers and technology providers to integrate identification capabilities directly into packaging workflows.

E-Commerce and Gray-Market Leakage

The expansion of direct-to-consumer commerce is creating additional authentication requirements. Serialized packaging and tamper-evident features can help businesses establish product identity as goods move through distribution, fulfillment and returns processes.

This trend is also supporting applications related to gray-market monitoring, returns authentication and product-level supply-chain visibility.

Increasingly Sophisticated Counterfeit Reproduction

High-resolution reproduction capabilities are increasing the pressure on packaging features that depend primarily on visual recognition. As a result, brand owners are exploring layered security architectures that combine visible elements with covert markers, machine-readable identifiers and digital verification.

This shift is expanding the role of authentication technologies that can be validated through specialized equipment, mobile devices or digital platforms.

Technology and Usage Feature Landscape

Trace and Track was the largest technology segment in 2025, with a 29.9% revenue share. Forensic Markers are projected to record the fastest growth among technology segments, with a 14.0% CAGR through 2035, as laboratory-verifiable authentication expands into automotive and semiconductor applications.

The technology landscape includes:

- Trace and Track
- Overt Features
- Covert Features
- Tamper Evidence
- Forensic Markers

By usage feature, Serialization Codes represented 33.4% of revenue in 2025, followed by Barcodes and 2D Carriers at 22.1% and Holograms at 18.7%. RFID and NFC Tags represented 11.9% and are projected to expand at a 15.1% CAGR through 2035.

Packaging Components and Formats

Labels and Tags held the largest packaging-component share at 30.5% in 2025. Films and Wraps accounted for 21.8%, while Closures and Seals represented 18.4%. Labels and tags benefit from their ability to add product identity without requiring extensive changes to existing packaging tooling.

By packaging format, Bottles accounted for 27.0% of 2025 revenue, followed by Flexible Packs at 23.6%, Blisters and Clamshells at 19.4%, Cartons at 17.8%, and Cans at 12.2%.

The adoption of [flexible packaging](#) is also being supported by e-commerce fulfillment, while bottles remain important for pharmaceuticals, spirits and personal-care products.

Regional Market Development

North America held the largest regional share, accounting for 35.9% of global revenue in 2025. The region benefits from pharmaceutical verification infrastructure, RFID adoption and established packaging-conversion capabilities.

Europe accounted for 27.4% of revenue in 2025, supported by medicines verification infrastructure and preparations for Digital Product Passport requirements.

Asia-Pacific represented 26.2% of global revenue and is projected to be the fastest-growing regional market, with a 14.6% CAGR through 2035. Pharmaceutical coding, export-compliance labeling, luxury-goods authentication and e-commerce verification are contributing to regional demand.

South America accounted for 5.8%, while the Middle East & Africa represented 4.7% of global revenue in 2025.

Opportunities Emerging Across the Industry

Digital Product Passport Conversion

Digital Product Passport infrastructure in Europe is creating an opportunity to extend existing product-identification and serialization capabilities into additional product information. Secure machine-readable carriers can connect physical products with digital information covering attributes such as sustainability, recycled content and repair records.

Pharmaceutical Serialization in Emerging Markets

Pharmaceutical serialization programs in emerging markets are creating opportunities for packaging technology providers and solution integrators. Cloud-based serialization platforms and lower-capital solutions can help mid-sized manufacturers adopt product-level identification and verification capabilities.

Data Monetization and Post-Purchase Services

Connected packaging can generate product-level authentication and interaction data. Businesses can potentially use this information for gray-market mapping, demand analysis, warranty registration and other post-purchase applications.

Forensic Authentication for High-Consequence Components

Forensic markers are expanding beyond conventional pharmaceutical applications. Automotive and semiconductor components can benefit from laboratory-verifiable authentication where product provenance and component integrity are particularly important.

Competitive Landscape

The Anti-counterfeit Packaging Market includes participants spanning intelligent labels, RFID, security materials, authentication technologies, serialization systems and digital verification platforms.

Key players include Avery Dennison, 3M, CCL Industries, Zebra Technologies, Crane NXT and SICPA. The wider competitive landscape includes companies such as Toppan Holdings, Sato Holdings, Authentix, Digimarc, AlpVision and TraceLink.

Competition spans several technology disciplines, including packaging conversion, print chemistry, RFID hardware, authentication systems and enterprise software. This creates

opportunities for both diversified packaging suppliers and specialized authentication technology providers.

Future Outlook

The Anti-counterfeit Packaging Market is expected to increasingly connect physical packaging with digital product identity through 2035. Serialization repositories, verification APIs, machine-readable carriers and analytics platforms are becoming important components of authentication ecosystems.

The market is also seeing greater convergence between authentication, supply-chain visibility and post-purchase services. As connected packaging expands, product identity can serve functions beyond counterfeit detection, including returns verification, warranty management, gray-market monitoring and supply-chain analytics.

At the same time, sustainability considerations are influencing security-material selection. Packaging manufacturers are evaluating security features alongside recyclability, material efficiency and compatibility with evolving packaging regulations.

The combination of regulatory requirements, e-commerce distribution, digital identity and advances in authentication technology is expected to continue shaping the market through the forecast period.

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