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Global Track and Trace Solutions Market: Analysis By Component (Software Solutions and Hardware Systems); Technology (Barcode, Radio Frequency Identification (RFID) and Others); Enterprise Size (Large Enterprises and Small and Medium Enterprises (SMEs)); Application (Serialization Solutions and Aggregation Solutions) and End Users (Pharmaceuticals, Consumer Goods, Food & Beverages, Medical Devices, and Others), By Region, Size & Forecast with Impact Analysis of COVID-19 and Forecast up to 2029

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Abstracts

The global track and trace solution market was valued at US$6.52 billion in 2023. The market value is expected to reach US$15.73 billion by 2029. Track and trace solutions can be described as a collection of technologies and processes that make it possible to identify and monitor products as they move through the supply chain. The process usually entails giving each product a unique code or identifier, which allows for tracking and tracing using a variety of technologies, including barcode scanning, GPS (Global Positioning System), RFID (Radio Frequency Identification), and others.

The major drivers for the track and trace solution market include growing demand for transparency and accountability in the supply chain, development of industrial-grade digital technology, and an increasing adoption of blockchain technology. The market is expected to grow as governments across the world are adopting regulations on serializations in certain industries such as pharmaceuticals & medical devices, where

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the grey market sales and counterfeiting are a major problem. Furthermore, stringent regulations and standards pertinent to serialization implementation and aggregation are anticipated to drive the market for track and trace solutions. The market is expected to grow at a CAGR of approx. 16% during the forecasted period of 2024-2029.

Market Segmentation Analysis:

By Component: The report provides the bifurcation of the global track and trace solution market into two components: Software Solutions and Hardware Systems. The software solutions segment held the highest share of the market. The market for track and trace software is expected to grow as a result of growing awareness of counterfeit products necessitating the adoption of track and trace solutions, rising adoption in healthcare companies, including pharmaceuticals, biopharmaceuticals, and medical device companies and successional revenue generation from the software businesses due to subscription-based models because of the implementation of serialization guidelines across various countries. Companies developing this software are investing in R&D for better product development which is expected to propel the growth.

By Technology: The report provides the bifurcation of the market into two segments based on the technology: Barcode, Radio Frequency Identification (RFID) and others. The barcode segment held the highest share in the market. The increased application of 2D barcodes in pharmaceutical and biopharmaceutical product packaging is a major factor that contributed to the higher revenue share. In addition, ample data storage capacity of 2D barcodes than linear barcodes and its higher popularity in the industry boost the demand for 2D barcode-based solutions.

By Enterprise Size: The report further provided the segmentation based on the following applications: Large Enterprises and Small and Medium Enterprises (SMEs). The market's rise is being driven by the demand for software in key end users to assist in the collection of critical business data from various and different sources, such as inventory levels, predicted sales figures, supplier information, and others. Moreover, large enterprises have strong infrastructure, coupled with skilled IT personnel, to maintain large volumes of supply chain database platform, which is driving the segment’s growth.

By Application: The global track and trace solution market has been further analyzed based on the application: Serialization Solutions and Aggregation Solutions. The serialization solutions segment held the dominant share in the market as serialization

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solutions makes it possible to track and trace products all the way from production to distribution. The increased focus on patient safety, stringent regulatory requirements, and the growing need for efficient supply chain management are driving the demand for serialization solutions in the global market.

By Distribution Channel: The report identifies three segments of the global track and trace solution market on basis of distribution channel: Pharmaceuticals, consumer Goods, Food & Beverages, Medical Devices and Others. The pharmaceuticals segment held the largest share of the market in 2023 and is anticipated to register the highest CAGR during the forecast period. Compliance with serialization regulations is becoming increasingly important in the pharmaceutical industry, thereby driving the growth of the market. Additionally, the implementation of stringent regulations by regulatory authorities such as the FDA and the European Medicines Agency further contributes to the dominance of the pharmaceutical sector in the global market. Thus, owing to all such factors, the pharmaceutical segment is anticipated to attain immense growth in the forthcoming years.

By Region: In the report, the global track and trace solution market is divided into five regions: North America (The US, Canada and Mexico), Europe (Germany, France, UK, Italy and Rest of Europe), Asia Pacific (China, Japan, India, South Korea and Rest of Asia Pacific), South & Central America and Middle East and Africa. In 2023, the North America region led the track and trace solution market, propelled by the presence of highly regulated serialization and aggregation standards, as well as advanced healthcare infrastructure along with expanding medical devices market. Additionally, the increasing investment in advanced technologies across various industries, including pharmaceuticals, automobiles, retail and eCommerce, and others, fosters market development. During 2024-2029, the US is forecasted to maintain its lead within North America. The US is an early adopter of advanced technologies, helping market vendors offer customized and advanced technology-enabled track and trace solutions for consumers. In addition, the region is witnessing significant growth due to the presence of prominent companies across various industries, including pharmaceuticals, automobiles, retail and eCommerce, and others.

Market Dynamics:

Growth Drivers: The global track and trace solution market growth is predicted to be supported by numerous growth drivers such as upsurge in drug counterfeiting incidents, augmenting demand from automotive industry, globalization and rising complexity of supply chains, stringent regulatory compliance and government initiatives, and many

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other factors. The increasing demand for transparency and accountability in the supply chain is likely to be a crucial factor driving market growth. Track and trace solutions help in obtaining real-time information about the products' whereabouts. As businesses across several industries expand, the demand for track and trace solutions is likely to rise. The emphasis on increasing supply chain efficiency is projected to fortify market expansion in the coming years.

Challenges: However, the market growth would be negatively impacted by various challenges such as high implementation cost, availability of alternative anti-counterfeiting technologies, etc.

Trends: The market is projected to grow at a fast pace during the forecast period, due to various latest trends such as rapid expansion of e-commerce industry, integration of Artificial Intelligence (AI), adoption of blockchain technology, surging demand from aviation industry, etc. Track and trace solutions play a crucial role in e-commerce, optimizing operations, enhancing customer satisfaction, and ensuring the integrity of the supply chain for a more efficient and trustworthy online shopping experience. With its increased importance, it is critical for e-commerce businesses to ensure they are providing customers with an efficient and secure online shopping experience, leading to growing implementation of track and trace solutions. As a consequence, rapid expansion of e-commerce industry is expected to propel the growth of the track and trace solutions market in coming years.

Impact Analysis of COVID-19 and Way Forward:

The emergence of COVID-19 was favorable towards the growth of the global track and trace solutions market. The need for efficient monitoring and tracing technologies to monitor and manage the virus's transmission has grown as a result of its rapid spread. Additionally, the pandemic has given rise to the circulation of counterfeit drug products. There was a sharp increase in the sale of counterfeit drug products related to COVID-19, particularly in low- and middle-income nations. Resultantly, the track and trace solutions market has been stimulated by the COVID-19 pandemic, leading to increased innovation and uptake in the end user industry.

Competitive Landscape:

The global track and trace solutions market is highly competitive in nature with considerable number of players, having a high level of consolidation overall revenue share. The key players in the global track and trace solution market are:

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Mettler Toledo International Inc.
Zebra Technologies Corporation
Axway Software SA
Siemens AG
International Business Machines Corporation (IBM)
SAP SE
Accenture PLC
Honeywell International Inc.
Oracle Corporation
TraceLink Inc.
Antares Vision SPA
Optel Group
Markem-Imaje AG

The key players are constantly involved in product launches with better efficiency and treatment outcomes. The vendors are increasing their focus on strategic partnerships with their consumers and are collaborating with others players in the sector. For instance, in November 2023, Mettler Toledo International Inc. had launched its second Pos Shop convenience store, strategically located in the heart of the vibrant Brickfields community in Kuala Lumpur. Also, in January 2024, DHL Global Forwarding partnered with Schneider Electric, the provider in the digital transformation of energy management and automation, to design and launch an industry-first multi-modal shipping model, using sustainable aviation fuels (SAFs) to help improve the agility and reduce the environmental impact of its supply chain.

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