

Coding & Marking Market - Global Outlook & Forecast 2024-2029

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Report description:

The global coding and marking market is expected to grow at a CAGR of 8.59% from 2023 to 2029.

MARKET TRENDS & OPPORTUNITIES

Growing Demand for Laser Coding

Laser coding is one of the recent developments in the global coding and marking market, and the technology has witnessed a sharp rise in demand, largely due to its properties and feasibility across various end-user industry applications. For instance, laser coding solutions are gaining popularity across the end-user industries, such as cosmetics, personal care, F&B, and automotive. A key reason for this growth in popularity is the ability of laser coding to remain permanent and of higher quality than its peer coding and marking solutions. Over the last few years, global coding and marking vendors have introduced various laser marking solutions. This is also attributed to the fact that laser coding and marking is one of the best ways to adhere to regulatory standards while maintaining packaging demands. Since a packaged product must undergo a series of processes in a supply chain that tests its marking durability, it is relevant for the marking to remain substantially strong throughout the process. Laser marking has shown positive signs of staying permanent, mitigating the strong challenge of product counterfeiting. This laser marking property further increases its demand and popularity when selecting the printing/marketing technique type.

Increased Demand for Processed & Packaged Food

As the demand for food products increases, there is a corresponding need for reliable and efficient coding & marking solutions to ensure that these products are labeled accurately and comply with regulatory requirements. The global increase in disposable income and the rising population have driven the consumption of packaged and processed foods. Consumers preferred packaged food due to virus concerns about open and raw food products. Urbanization in India, China, and other APAC countries is expected to be rapid. In developed countries, it is expected to show a steady increase. Most spending on packaged goods comes from urban areas; hence, consumption is expected to witness significant growth in APAC. Also, the increase in different types of

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packaged food has led to a greater demand for easy-to-use packaging products with an easy-to-print surface to enable product differentiation in stores. This, in turn, has boosted the global coding and marking market growth. Furthermore, food safety and traceability regulations have become more stringent recently, particularly in developed countries. This has driven the need for accurate and reliable coding & marking on food packaging.

INDUSTRY RESTRAINTS

Operational Errors & High Cost

Errors due to human negligence or mistakes can often dent the profits of manufacturers and vendors. Humans are considered accountable for over 69% of product coding errors. This is a significant challenge across end-user industries that manufacturers consistently focus on. Large-scale manufacturing companies often have people working in shifts, increasing human-machine interaction. This tends to increase the scope of errors due to the time needed to master the printing machine process. Moreover, this denies companies time and resources they can use in other productive ways. The current manufacturing era demands manufacturers run the production process consistently without any hindrances. Moreover, the need-to-meet on-demand production requires manufacturers to have sufficient resources, time, and money to run the production all year. Companies in end-user industries, especially F&B and automotive, desire to attain zero human error. Considering the strong shift of global manufacturing toward Industry 4.0, the scope for human error has to be minimized to gain a competitive edge over rivals. With the coding and marking market being highly competitive, vendors are expected to deliver innovative solutions to resolve issues related to human errors and their consequences.

SEGMENTATION INSIGHTS

INSIGHT BY TECHNOLOGY

The CIJ technology segment holds the most significant share of the global coding and marking market 2023. Continuous inkjet technology is one of the most widely used technologies in the market. It is a non-contact printing technology that uses a constant stream of ink droplets to create characters and codes on various substrates, including plastics, metals, and paper. One of the advantages of CIJ technology is its ability to print on various substrates, including curved and irregular surfaces. This makes it an ideal technology for the packaging industry, where products come in various shapes & sizes. In addition to its speed & versatility, CIJ technology is also popular due to its low cost of ownership. Among vendors, Linx, Videojet Technologies, Domino-Printing, Hitachi, Kao Collins, Leibinger Group, ITW Diagraph, ID Technology, and others are some prominent leaders in the production of CIJ Technology. Furthermore, the laser segment will witness the highest CAGR in the global coding and marking market of more than 9.6% during the forecast period. Laser marking is applicable across a wide range of substrates, spanning metals, plastics, and ceramics, creating diverse marking types like barcodes, QR codes, and logos.

Segmentation by Technology

- CIJ Technology
- Laser Technology
- Palm Technology
- TTO Technology
- PIJ Technology
- VIJ Technology
- TIJ Technology

INSIGHT BY END-USER

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The global coding and marking market by end-users is segmented into food & beverage, healthcare, electrical & electronics, chemicals & construction, automotive & aerospace, and others. In 2023, the food & beverage industry was the largest end-user segment of the global market. Coding and marking play a crucial role in the global F&B industry, driven by the need for appropriate solutions to meet evolving demands. The expansion of potential markets worldwide and the proliferation of stock-keeping units (SKUs) further bolster this demand, spurred by increased consumer spending. Furthermore, consumers are increasingly concerned about the ingredients present in their food, leading to heightened government and regulatory scrutiny on product packaging, resulting in stringent coding, marking, and labeling requirements. Effective coding and marking on primary and secondary packaging are essential for products throughout the supply chain, aligning with government mandates to promote healthy food choices. In addition, several other factors, such as changing consumer preferences about the consumption of products, increasing demand for sustainable packaging, rising demand for attractive packages, and more, fuel the end-user industry's growth. Such factors eventually boost the demand for coding and marking globally.

Segmentation by End-Users

- Food & Beverage
- Healthcare
- Electrical & Electronics
- Chemicals & Construction
- Automotive & Aerospace
- Others

INSIGHT BY PRODUCT MIX

The global coding and marking market by product mix is segmented into consumables, equipment, spare parts & aftermarket. The consumables product mix segment the global market share in 2023. Various consumables are essential for ensuring efficient, high-quality printing in the coding & marking market. These consumables include printheads, ribbons, and inks, each suited to different technologies and applications. Printheads are crucial components in printing devices that transfer ink onto the substrate. Furthermore, some common companies providing consumables for coding & marking include Domino Printing Science, Videojet Technologies, Markem-Imaje, and others. Domino Printing Sciences offers various types of printheads, including thermal inkjet (TIJ) and continuous inkjet (CIJ) technologies, known for their reliability and precision.

Segmentation by Product Mix

- Consumables
- Equipment
- Spare Parts & Aftermarket

GEOGRAPHICAL ANALYSIS

APAC dominated the global coding and marking market share, accounting for over 31% of the global market share in 2023. APAC is expected to witness significant growth in the coding & marking market due to the rising population and increasing demand for packaged products in countries like China and India. The growth of e-commerce and online retailing in the region is also expected to contribute to the demand for coding & marking systems. Also, the urbanization of developing countries in APAC is expected to bolster the demand for food and beverage products and healthcare provisions, thus driving the demand for coding and marking equipment during the forecast period. While Japan and China are the major markets for coding and marking equipment, countries like India are expected to witness high demand due to improved quality of life.

North America is a significant coding and marking market with various applications in different industries, such as F&B, pharmaceutical, and packaging. The North American market is highly developed and has many large multinational manufacturing companies operating in industries like F&B and pharmaceutical. PepsiCo, Nestle, and Quaker are large F&B companies in North

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America. Pfizer and Novartis are examples of pharmaceutical companies operating in North America. These industries have coding and marking requirements to label their manufactured products. Furthermore, Latin America and the Middle East & Africa are also expected to witness substantial growth in the coding and marking market due to the increasing demand for product traceability and safety, particularly in the F&B industry.

Segmentation by Geography

- APAC
 - o□China
 - o□Japan
 - o□India
 - o□Australia
 - o□South Korea
 - o□Indonesia
 - o□Singapore
 - o□Philippines
- North America
 - o□The U.S.
 - o□Canada
- Western Europe
 - o□Germany
 - o□The U.K.
 - o□France
 - o□Italy
 - o□Benelux
 - o□Spain
 - o□Rest of Scandinavia
 - o□Sweden
 - o□Portugal
- Latin America
 - o□Brazil
 - o□Mexico
 - o□Argentina
- Middle East & Africa
 - o□South Africa
 - o□Iran
 - o□UAE
 - o□Nigeria
 - o□Saudi Arabia
- Central & Eastern Europe
 - o□Turkey
 - o□Poland

COMPETITIVE LANDSCAPE

The global coding and marking market is characterized by intense competition and fragmentation, with numerous players offering diverse products and solutions. Companies compete for market share by emphasizing product excellence, innovation, customer support, and pricing to set themselves apart. While some major players in the global coding and marking market, such as Danaher

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Corporation, Dover Corporation, Domino Printing Sciences, Hitachi Industrial Equipment Systems, and ID Technology, dominate the landscape, smaller competitors like Squid Ink Manufacturing, REA Elektronik, and Linx Printing Technologies also play significant roles. These smaller firms often focus on specific market niches or specialized applications, leveraging unique features and capabilities to compete effectively. Furthermore, the adoption rate of coding and marking services among end-users worldwide has been impressive. As a result of increased demand, the industry has witnessed the entry of many vendors that provide coding and marking tools at lower prices. Competition among these companies has intensified, introducing many innovative and advanced solutions.

Key Development in the Global Coding and Marking Market

- In 2023, Brother Industries announced the opening of Domino Printing Indonesia, headquartered in Jakarta.
- Dover Corporation heavily invests in research and development to adopt digital strategies that meet customers' needs and enhance their capabilities.
- ITW Diagraph has expanded its presence across Asia and Africa through partnerships with distributors and agents in these markets.

Key Company Profiles

- Brother Industries
- CONTROL PRINT
- Dover Corporation
- Hitachi Industrial Equipment & Solutions
- ITW Diagraph
- Videojet Technologies

Other Prominent Vendors

- ANSER Coding
- ATD UK
- Beijing Hi-Pack Coding
- EBS Ink-Jet Systems
- Guangzhou EC-PACK Packaging Equipment
- ICONOTECH
- ID Technology
- Inkjet
- Jet Inks
- KGK Jet
- KEYENCE
- Koenig & Bauer Coding
- Kortho Coding & Marking
- Laserax
- Leibinger Group
- Macsa ID
- Matthews International
- MECCO
- REA Elektronik
- Squid Ink

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- Weber Marking Systems
- Xaar
- Zanasi

KEY QUESTIONS ANSWERED:

- 1.□How extensive is the coding and marking market?
- 2.□Which region dominates the global coding and marking market share?
- 3.□What is the growth rate of the global coding and marking market?
- 4.□What are the significant trends in the coding and marking market?
- 5.□Who are the key players in the global coding and marking market?

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