

Global Water-fugitive Security Ink Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Water-fugitive Security Ink market size was valued at US\$ 894 million in 2025 and is forecast to a readjusted size of US\$ 1143 million by 2032 with a CAGR of 3.6% during review period.

Water-fugitive Security Ink (also referred to as water-fugitive ink or water-sensitive security ink) is a security-printing ink engineered to undergo an obvious, largely irreversible visual change upon contact with water—such as bleeding, dissolution, smearing, color loss, or the revelation of a predesigned warning—so that tampering attempts become immediately detectable and evidentiary. It addresses two common attack vectors: “wash-and-reprint” fraud where water or wet cleaning is used to remove printed information, backgrounds, stains or marks before reprinting, and moisture-assisted manipulation such as softening adhesive layers to lift, replace, or reapply labels and seals. By ensuring that water exposure damages the printed feature and leaves a clear trace, water-fugitive inks reduce the feasibility of reversible alteration while enabling fast field inspection. Historically, the category evolved in parallel with growing anti-wash requirements for financial documents and secure paper applications—initially relying on water-soluble dyes and easily dispersible pigments to create bleeding effects, and later advancing toward more engineered trigger behavior with controlled response speed, bleed boundary, contrast, and compatibility with specific papers, coatings, and finishing steps. Upstream inputs typically include water-soluble or water-dispersible dye/pigment systems (driving the bleed and color response), binder/resin and vehicle platforms that balance adhesion and abrasion resistance with deliberate water sensitivity, surfactants and dispersion aids, rheology and film-forming additives, and substrate-matching primers/overprint varnishes; implementation and acceptance often use standardized water-drop or wet-rub test tools,

absorbent media, and where needed image capture and evaluation equipment supplied by the broader specialty chemicals and inspection ecosystem. In 2025, global production capacity for water-fugitive security inks reached 300,000 tons, with sales volume totaling 253,700 tons. The average selling price was USD 3,425 per ton, and industry gross margins were generally in the range of 20%–30%.

The water-fugitive (water-sensitive) security ink market is primarily driven by two use cases: anti-wash protection for documents and tamper evidence for seals and labels. In paper-based applications such as tickets, revenue documents, and certificates, buyers often treat resistance to “wash-and-reprint” attacks as a baseline requirement, expecting inks to remain stable in normal handling and storage while producing a fast, obvious, and irreversible visual disruption under standardized water-drop or wet-rub conditions. In seals, labels, and brand-protection workflows, water-fugitive behavior is used to deter moisture-assisted lifting, relabeling, and localized cleaning, often deployed alongside covert features or serialization to strengthen enforcement and dispute resolution. While the category benefits from simplicity, low operational burden, and easy field interpretation, it increasingly faces substrate and finishing complexity—lamination, varnishing, thermal coatings, and variability in coated papers—forcing suppliers to invest in broader formulation windows and tighter quality consistency.

Looking forward, development will concentrate on controllable triggering, multi-feature integration, and more consistent verification. First, trigger behavior will become more engineered—allowing response speed, bleed boundary, and contrast to be tuned to local standards and application needs while reducing sensitivity to ambient humidity and paper absorbency variation to avoid false positives. Second, integration with other security features will become more common, combining water-fugitive tamper evidence with fluorescence, infrared, magnetic, or machine-readable elements so that water exposure both leaves visible damage and still supports instrumented forensic verification. Third, verification will continue to standardize and toolize: beyond simple water-drop checks, more users will adopt defined test media, repeatable application conditions, and image capture with threshold-based evaluation to improve cross-site and cross-agency consistency. In parallel, sustainability and compliance pressures will accelerate moves toward lower-VOC, lower-migration systems and safer additive packages, shaping binder and vehicle choices.

Key drivers include persistent enforcement needs against water-wash fraud, growing regulatory emphasis on tamper evidence and auditability, and brand preference for clear, irreversible visual proof that supports field inspections and dispute handling. These advantages become more valuable as distribution networks grow more complex

and secondary markets more active. Constraints largely center on balancing robustness and sensitivity: water-fugitive behavior must reconcile everyday tolerance with reliable, unmistakable activation, and exposure to humidity, condensation, or accidental splashes can create user-experience risks if not tightly controlled. Post-press finishes can also reduce water contact and undermine performance, increasing dependence on process control and acceptance standards. Finally, variability across papers and coatings can lengthen qualification cycles, requiring strong supplier support, standardized testing protocols, and consistent lot-to-lot delivery to enable scalable deployment.

This report is a detailed and comprehensive analysis for global Water-fugitive Security Ink market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Water-fugitive Security Ink market size and forecasts, in consumption value (\$ Million), sales quantity (Kilotons), and average selling prices (US\$/Ton), 2021-2032

Global Water-fugitive Security Ink market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Kilotons), and average selling prices (US\$/Ton), 2021-2032

Global Water-fugitive Security Ink market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Kilotons), and average selling prices (US\$/Ton), 2021-2032

Global Water-fugitive Security Ink market shares of main players, shipments in revenue (\$ Million), sales quantity (Kilotons), and ASP (US\$/Ton), 2021-2026

The Primary Objectives in This Report Are:

- To determine the size of the total market opportunity of global and key countries
- To assess the growth potential for Water-fugitive Security Ink
- To forecast future growth in each product and end-use market
- To assess competitive factors affecting the marketplace

This report profiles key players in the global Water-fugitive Security Ink market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include SICPA, Sun Chemical, Luminescence Sun Chemical Security, Kao Collins, Angstrom Technologies, Flint Group, Microtrace, INX International Ink, ROTOFLEX, Gleitsmann Security Inks, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Market Segmentation

Water-fugitive Security Ink market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

Offset Inks

Intaglio Inks

Silkscreen Inks

Gravure/Flexo Inks

Others

Market segment by Visibility

Overt Paper Security Ink

Covert Paper Security Ink

Semi-Covert Paper Security Ink

Market segment by Evidence Behavior

Instant-Response Water-Fugitive Ink

Delayed-Response Water-Fugitive Ink

Market segment by Application

Safety Label

Official Identity Document

Banknotes

Other

Major players covered

SICPA

Sun Chemical

Luminescence Sun Chemical Security

Kao Collins

Angstrom Technologies

Flint Group

Microtrace

INX International Ink

ROTOFLEX

Gleitsmann Security Inks

PETREL

Cronite

Chroma Inks USA

hubergroup

artience

Shanghai Wancheng Anti-counterfeiting Ink

Mingbo Security Technology

GODO Printing Ink

Market segment by region, regional analysis covers
North America (United States, Canada, and Mexico)
Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)
Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)
South America (Brazil, Argentina, Colombia, and Rest of South America)
Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Water-fugitive Security Ink product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Water-fugitive Security Ink, with price, sales quantity, revenue, and global market share of Water-fugitive Security Ink from 2021 to 2026.

Chapter 3, the Water-fugitive Security Ink competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Water-fugitive Security Ink breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Water-fugitive Security Ink market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Water-fugitive Security Ink.

Chapter 14 and 15, to describe Water-fugitive Security Ink sales channel, distributors, customers, research findings and conclusion.

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