

Global Watermark Security Paper Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Watermark Security Paper market size is expected to reach \$ 956 million by 2032, rising at a market growth of 4.1% CAGR during the forecast period (2026-2032).

Watermark security paper is a special type of security paper created during the papermaking process by using special techniques (such as rolling and resin coating) to differentiate the density of paper fibers, resulting in translucent, embossed patterns. Its characteristics include images that are hidden within the paper, visible to the light, and difficult to copy or forge. It is commonly used in high-end security applications such as certificates, securities, and banknotes. Market growth is primarily driven by anti-counterfeiting demand, government policies, and technological upgrades. High-end watermarked paper has high requirements for technology and materials, creating significant industry barriers.

The upstream raw material for watermark security paper is mainly high-brightness bleached softwood/broadwood pulp. Anti-counterfeiting auxiliary materials include colored fluorescent fibers, colorless anti-counterfeiting fibers, metallic security threads, color-changing agents, special sizing agents, and watermark-specific coatings. Downstream applications are mainly in anti-counterfeiting printing and standardized product processing, with strong customer loyalty and high barriers to replacement.

In 2025, global sales of watermark security paper reached 135,000 tons, with a production capacity of approximately 168,000 tons, an average selling price of US\$5,250 per ton, and an average gross profit margin of 20%-30%.

The global watermarked security paper market is primarily concentrated in Europe, North America, and China. European companies lead in high-end security paper

technology, mainly serving the currency, document, and high-value bill markets. North American companies maintain a stable supply in the currency and financial security paper sector, emphasizing environmental protection and sustainable production. Chinese manufacturers are experiencing rapid capacity growth, primarily meeting domestic demand for security paper for bills and documents, as well as export needs. The global market exhibits a pattern of 'European technological leadership, stable supply in North America, and capacity expansion in China.'

Demand for watermarked security paper mainly comes from currency, security bills, government documents, and high-security commercial security documents. With the expansion of global financial businesses, the upgrading of government documents, and increased corporate requirements for security in contracts, invoices, and certificates, market demand continues to grow. Furthermore, upgrades in security technologies (such as fluorescent fibers, microtext, invisible watermarks, and RFID) are further expanding the demand for high-end watermarked paper. The overall demand structure shows a rising proportion of high-end security paper and steady growth in mid-to-low-end security bill paper.

Watermarked security paper is evolving towards multi-layered security, high security, and environmental friendliness. Traditional banknote and bill papers are gradually incorporating fluorescent fibers, metallic threads, microtext, invisible patterns, and digital watermarking technologies into their watermarking technology. Simultaneously, paper strength, folding endurance, moisture resistance, and printing compatibility are continuously improving to meet the requirements of complex printing processes and long-term use. Environmentally friendly watermarked paper (with biodegradable coatings or recyclable materials) is gradually becoming a focus of market attention.

This report studies the global Watermark Security Paper production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Watermark Security Paper and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Watermark Security Paper that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Watermark Security Paper total production and demand, 2021-2032, (Kilotons)

Global Watermark Security Paper total production value, 2021-2032, (USD Million)

Global Watermark Security Paper production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons), (based on production site)

Global Watermark Security Paper consumption by region & country, CAGR, 2021-2032 & (Kilotons)

U.S. VS China: Watermark Security Paper domestic production, consumption, key domestic manufacturers and share

Global Watermark Security Paper production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Kilotons)

Global Watermark Security Paper production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

Global Watermark Security Paper production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

This report profiles key players in the global Watermark Security Paper market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Giesecke+Devrient, Crane Currency, Arjowiggins Group, De La Rue, Louisenthal, Landqart, Portals Paper Ltd, VHP Security Paper, Drewsen Spezialpapiere, Goznak, etc.

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

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Watermark Security Paper market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Kilotons) and average price (US\$/Ton) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Watermark Security Paper Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Watermark Security Paper Market, Segmentation by Type:

White Watermark

Black Watermark

Mixed Black and White Watermark

Global Watermark Security Paper Market, Segmentation by Gram:

50-80g/m?

80-120g/m?

?200g/m?

Global Watermark Security Paper Market, Segmentation by Manufacturing Techniques:

Traditional Watermarked Paper

Chemical Watermarked Paper

Electronic Watermarked Paper

Fiber Anti-counterfeiting Paper

Global Watermark Security Paper Market, Segmentation by Application:

Banknotes

Documents

Labels

Official Seals

Others

Companies Profiled:

Giesecke+Devrient

Crane Currency

Arjowiggins Group

De La Rue

Louisenthal

Landqart

Portals Paper Ltd

VHP Security Paper

Drewsen Spezialpapiere

Goznak

Xianhe Group

Laiyang Yintong Paper Industry

Wenzhou Haoge Anti-counterfeiting Technology

Taizhong Special Paper

Guangdong Qiaosheng Anti-counterfeiting Materials

Dongguan Tiansheng Special Paper Products

Oji Holdings

KOMSCO

Key Questions Answered:

1. How big is the global Watermark Security Paper market?
2. What is the demand of the global Watermark Security Paper market?
3. What is the year over year growth of the global Watermark Security Paper market?
4. What is the production and production value of the global Watermark Security Paper market?
5. Who are the key producers in the global Watermark Security Paper market?
6. What are the growth factors driving the market demand?

Contents

1 SUPPLY SUMMARY

- 1.1 Watermark Security Paper Introduction
- 1.2 World Watermark Security Paper Supply & Forecast
 - 1.2.1 World Watermark Security Paper Production Value (2021 & 2025 & 2032)
 - 1.2.2 World Watermark Security Paper Production (2021-2032)
 - 1.2.3 World Watermark Security Paper Pricing Trends (2021-2032)
- 1.3 World Watermark Security Paper Production by Region (Based on Production Site)
 - 1.3.1 World Watermark Security Paper Production Value by Region (2021-2032)
 - 1.3.2 World Watermark Security Paper Production by Region (2021-2032)
 - 1.3.3 World Watermark Security Paper Average Price by Region (2021-2032)
 - 1.3.4 North America Watermark Security Paper Production (2021-2032)
 - 1.3.5 Europe Watermark Security Paper Production (2021-2032)
 - 1.3.6 China Watermark Security Paper Production (2021-2032)
 - 1.3.7 Japan Watermark Security Paper Production (2021-2032)
 - 1.3.8 India Watermark Security Paper Production (2021-2032)
 - 1.3.9 Southeast Asia Watermark Security Paper Production (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
 - 1.4.1 Watermark Security Paper Market Drivers
 - 1.4.2 Factors Affecting Demand
 - 1.4.3 Watermark Security Paper Major Market Trends

2 DEMAND SUMMARY

- 2.1 World Watermark Security Paper Demand (2021-2032)
- 2.2 World Watermark Security Paper Consumption by Region
 - 2.2.1 World Watermark Security Paper Consumption by Region (2021-2026)
 - 2.2.2 World Watermark Security Paper Consumption Forecast by Region (2027-2032)
- 2.3 United States Watermark Security Paper Consumption (2021-2032)
- 2.4 China Watermark Security Paper Consumption (2021-2032)
- 2.5 Europe Watermark Security Paper Consumption (2021-2032)
- 2.6 Japan Watermark Security Paper Consumption (2021-2032)
- 2.7 South Korea Watermark Security Paper Consumption (2021-2032)
- 2.8 ASEAN Watermark Security Paper Consumption (2021-2032)
- 2.9 India Watermark Security Paper Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

- 3.1 World Watermark Security Paper Production Value by Manufacturer (2021-2026)
- 3.2 World Watermark Security Paper Production by Manufacturer (2021-2026)
- 3.3 World Watermark Security Paper Average Price by Manufacturer (2021-2026)
- 3.4 Watermark Security Paper Company Evaluation Quadrant
- 3.5 Industry Rank and Concentration Rate (CR)
 - 3.5.1 Global Watermark Security Paper Industry Rank of Major Manufacturers
 - 3.5.2 Global Concentration Ratios (CR4) for Watermark Security Paper in 2025
 - 3.5.3 Global Concentration Ratios (CR8) for Watermark Security Paper in 2025
- 3.6 Watermark Security Paper Market: Overall Company Footprint Analysis
 - 3.6.1 Watermark Security Paper Market: Region Footprint
 - 3.6.2 Watermark Security Paper Market: Company Product Type Footprint
 - 3.6.3 Watermark Security Paper Market: Company Product Application Footprint
- 3.7 Competitive Environment
 - 3.7.1 Historical Structure of the Industry
 - 3.7.2 Barriers of Market Entry
 - 3.7.3 Factors of Competition
- 3.8 New Entrant and Capacity Expansion Plans
- 3.9 Mergers, Acquisition, Agreements, and Collaborations

4 UNITED STATES VS CHINA VS REST OF THE WORLD

- 4.1 United States VS China: Watermark Security Paper Production Value Comparison
 - 4.1.1 United States VS China: Watermark Security Paper Production Value Comparison (2021 & 2025 & 2032)
 - 4.1.2 United States VS China: Watermark Security Paper Production Value Market Share Comparison (2021 & 2025 & 2032)
- 4.2 United States VS China: Watermark Security Paper Production Comparison
 - 4.2.1 United States VS China: Watermark Security Paper Production Comparison (2021 & 2025 & 2032)
 - 4.2.2 United States VS China: Watermark Security Paper Production Market Share Comparison (2021 & 2025 & 2032)
- 4.3 United States VS China: Watermark Security Paper Consumption Comparison
 - 4.3.1 United States VS China: Watermark Security Paper Consumption Comparison (2021 & 2025 & 2032)
 - 4.3.2 United States VS China: Watermark Security Paper Consumption Market Share Comparison (2021 & 2025 & 2032)
- 4.4 United States Based Watermark Security Paper Manufacturers and Market Share, 2021-2026

4.4.1 United States Based Watermark Security Paper Manufacturers, Headquarters and Production Site (States, Country)

4.4.2 United States Based Manufacturers Watermark Security Paper Production Value (2021-2026)

4.4.3 United States Based Manufacturers Watermark Security Paper Production (2021-2026)

4.5 China Based Watermark Security Paper Manufacturers and Market Share

4.5.1 China Based Watermark Security Paper Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers Watermark Security Paper Production Value (2021-2026)

4.5.3 China Based Manufacturers Watermark Security Paper Production (2021-2026)

4.6 Rest of World Based Watermark Security Paper Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based Watermark Security Paper Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers Watermark Security Paper Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers Watermark Security Paper Production (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World Watermark Security Paper Market Size Overview by Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 White Watermark

5.2.2 Black Watermark

5.2.3 Mixed Black and White Watermark

5.3 Market Segment by Type

5.3.1 World Watermark Security Paper Production by Type (2021-2032)

5.3.2 World Watermark Security Paper Production Value by Type (2021-2032)

5.3.3 World Watermark Security Paper Average Price by Type (2021-2032)

6 MARKET ANALYSIS BY GRAM

6.1 World Watermark Security Paper Market Size Overview by Gram: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Gram

6.2.1 50-80g/m?

6.2.2 80-120g/m?

6.2.3 ?200g/m?

6.3 Market Segment by Gram

6.3.1 World Watermark Security Paper Production by Gram (2021-2032)

6.3.2 World Watermark Security Paper Production Value by Gram (2021-2032)

6.3.3 World Watermark Security Paper Average Price by Gram (2021-2032)

7 MARKET ANALYSIS BY MANUFACTURING TECHNIQUES

7.1 World Watermark Security Paper Market Size Overview by Manufacturing Techniques: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Manufacturing Techniques

7.2.1 Traditional Watermarked Paper

7.2.2 Chemical Watermarked Paper

7.2.3 Electronic Watermarked Paper

7.2.4 Fiber Anti-counterfeiting Paper

7.3 Market Segment by Manufacturing Techniques

7.3.1 World Watermark Security Paper Production by Manufacturing Techniques (2021-2032)

7.3.2 World Watermark Security Paper Production Value by Manufacturing Techniques (2021-2032)

7.3.3 World Watermark Security Paper Average Price by Manufacturing Techniques (2021-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World Watermark Security Paper Market Size Overview by Application: 2021 VS 2025 VS 2032

8.2 Segment Introduction by Application

8.2.1 Banknotes

8.2.2 Documents

8.2.3 Labels

8.2.4 Official Seals

8.2.5 Others

8.3 Market Segment by Application

8.3.1 World Watermark Security Paper Production by Application (2021-2032)

8.3.2 World Watermark Security Paper Production Value by Application (2021-2032)

8.3.3 World Watermark Security Paper Average Price by Application (2021-2032)

9 COMPANY PROFILES

9.1 Giesecke+Devrient

9.1.1 Giesecke+Devrient Details

9.1.2 Giesecke+Devrient Major Business

9.1.3 Giesecke+Devrient Watermark Security Paper Product and Services

9.1.4 Giesecke+Devrient Watermark Security Paper Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.1.5 Giesecke+Devrient Recent Developments/Updates

9.1.6 Giesecke+Devrient Competitive Strengths & Weaknesses

9.2 Crane Currency

9.2.1 Crane Currency Details

9.2.2 Crane Currency Major Business

9.2.3 Crane Currency Watermark Security Paper Product and Services

9.2.4 Crane Currency Watermark Security Paper Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.2.5 Crane Currency Recent Developments/Updates

9.2.6 Crane Currency Competitive Strengths & Weaknesses

9.3 Arjowiggins Group

9.3.1 Arjowiggins Group Details

9.3.2 Arjowiggins Group Major Business

9.3.3 Arjowiggins Group Watermark Security Paper Product and Services

9.3.4 Arjowiggins Group Watermark Security Paper Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.3.5 Arjowiggins Group Recent Developments/Updates

9.3.6 Arjowiggins Group Competitive Strengths & Weaknesses

9.4 De La Rue

9.4.1 De La Rue Details

9.4.2 De La Rue Major Business

9.4.3 De La Rue Watermark Security Paper Product and Services

9.4.4 De La Rue Watermark Security Paper Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.4.5 De La Rue Recent Developments/Updates

9.4.6 De La Rue Competitive Strengths & Weaknesses

9.5 Louisenthal

9.5.1 Louisenthal Details

9.5.2 Louisenthal Major Business

9.5.3 Louisenthal Watermark Security Paper Product and Services

9.5.4 Louisenthal Watermark Security Paper Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.5.5 Louisenthal Recent Developments/Updates

9.5.6 Louisenthal Competitive Strengths & Weaknesses

9.6 Landqart

9.6.1 Landqart Details

9.6.2 Landqart Major Business

9.6.3 Landqart Watermark Security Paper Product and Services

9.6.4 Landqart Watermark Security Paper Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.6.5 Landqart Recent Developments/Updates

9.6.6 Landqart Competitive Strengths & Weaknesses

9.7 Portals Paper Ltd

9.7.1 Portals Paper Ltd Details

9.7.2 Portals Paper Ltd Major Business

9.7.3 Portals Paper Ltd Watermark Security Paper Product and Services

9.7.4 Portals Paper Ltd Watermark Security Paper Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.7.5 Portals Paper Ltd Recent Developments/Updates

9.7.6 Portals Paper Ltd Competitive Strengths & Weaknesses

9.8 VHP Security Paper

9.8.1 VHP Security Paper Details

9.8.2 VHP Security Paper Major Business

9.8.3 VHP Security Paper Watermark Security Paper Product and Services

9.8.4 VHP Security Paper Watermark Security Paper Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.8.5 VHP Security Paper Recent Developments/Updates

9.8.6 VHP Security Paper Competitive Strengths & Weaknesses

9.9 Drewsen Spezialpapiere

9.9.1 Drewsen Spezialpapiere Details

9.9.2 Drewsen Spezialpapiere Major Business

9.9.3 Drewsen Spezialpapiere Watermark Security Paper Product and Services

9.9.4 Drewsen Spezialpapiere Watermark Security Paper Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.9.5 Drewsen Spezialpapiere Recent Developments/Updates

9.9.6 Drewsen Spezialpapiere Competitive Strengths & Weaknesses

9.10 Goznak

9.10.1 Goznak Details

9.10.2 Goznak Major Business

- 9.10.3 Goznak Watermark Security Paper Product and Services
- 9.10.4 Goznak Watermark Security Paper Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.10.5 Goznak Recent Developments/Updates
- 9.10.6 Goznak Competitive Strengths & Weaknesses
- 9.11 Xianhe Group
 - 9.11.1 Xianhe Group Details
 - 9.11.2 Xianhe Group Major Business
 - 9.11.3 Xianhe Group Watermark Security Paper Product and Services
 - 9.11.4 Xianhe Group Watermark Security Paper Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.11.5 Xianhe Group Recent Developments/Updates
 - 9.11.6 Xianhe Group Competitive Strengths & Weaknesses
- 9.12 Laiyang Yintong Paper Industry
 - 9.12.1 Laiyang Yintong Paper Industry Details
 - 9.12.2 Laiyang Yintong Paper Industry Major Business
 - 9.12.3 Laiyang Yintong Paper Industry Watermark Security Paper Product and Services
 - 9.12.4 Laiyang Yintong Paper Industry Watermark Security Paper Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.12.5 Laiyang Yintong Paper Industry Recent Developments/Updates
 - 9.12.6 Laiyang Yintong Paper Industry Competitive Strengths & Weaknesses
- 9.13 Wenzhou Haoge Anti-counterfeiting Technology
 - 9.13.1 Wenzhou Haoge Anti-counterfeiting Technology Details
 - 9.13.2 Wenzhou Haoge Anti-counterfeiting Technology Major Business
 - 9.13.3 Wenzhou Haoge Anti-counterfeiting Technology Watermark Security Paper Product and Services
 - 9.13.4 Wenzhou Haoge Anti-counterfeiting Technology Watermark Security Paper Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.13.5 Wenzhou Haoge Anti-counterfeiting Technology Recent Developments/Updates
 - 9.13.6 Wenzhou Haoge Anti-counterfeiting Technology Competitive Strengths & Weaknesses
- 9.14 Taizhong Special Paper
 - 9.14.1 Taizhong Special Paper Details
 - 9.14.2 Taizhong Special Paper Major Business
 - 9.14.3 Taizhong Special Paper Watermark Security Paper Product and Services
 - 9.14.4 Taizhong Special Paper Watermark Security Paper Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.14.5 Taizhong Special Paper Recent Developments/Updates

- 9.14.6 Taizhong Special Paper Competitive Strengths & Weaknesses
- 9.15 Guangdong Qiaosheng Anti-counterfeiting Materials
 - 9.15.1 Guangdong Qiaosheng Anti-counterfeiting Materials Details
 - 9.15.2 Guangdong Qiaosheng Anti-counterfeiting Materials Major Business
 - 9.15.3 Guangdong Qiaosheng Anti-counterfeiting Materials Watermark Security Paper Product and Services
 - 9.15.4 Guangdong Qiaosheng Anti-counterfeiting Materials Watermark Security Paper Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.15.5 Guangdong Qiaosheng Anti-counterfeiting Materials Recent Developments/Updates
 - 9.15.6 Guangdong Qiaosheng Anti-counterfeiting Materials Competitive Strengths & Weaknesses
- 9.16 Dongguan Tiansheng Special Paper Products
 - 9.16.1 Dongguan Tiansheng Special Paper Products Details
 - 9.16.2 Dongguan Tiansheng Special Paper Products Major Business
 - 9.16.3 Dongguan Tiansheng Special Paper Products Watermark Security Paper Product and Services
 - 9.16.4 Dongguan Tiansheng Special Paper Products Watermark Security Paper Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.16.5 Dongguan Tiansheng Special Paper Products Recent Developments/Updates
 - 9.16.6 Dongguan Tiansheng Special Paper Products Competitive Strengths & Weaknesses
- 9.17 Oji Holdings
 - 9.17.1 Oji Holdings Details
 - 9.17.2 Oji Holdings Major Business
 - 9.17.3 Oji Holdings Watermark Security Paper Product and Services
 - 9.17.4 Oji Holdings Watermark Security Paper Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.17.5 Oji Holdings Recent Developments/Updates
 - 9.17.6 Oji Holdings Competitive Strengths & Weaknesses
- 9.18 KOMSCO
 - 9.18.1 KOMSCO Details
 - 9.18.2 KOMSCO Major Business
 - 9.18.3 KOMSCO Watermark Security Paper Product and Services
 - 9.18.4 KOMSCO Watermark Security Paper Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.18.5 KOMSCO Recent Developments/Updates
 - 9.18.6 KOMSCO Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

10.1 Watermark Security Paper Industry Chain

10.2 Watermark Security Paper Upstream Analysis

10.2.1 Watermark Security Paper Core Raw Materials

10.2.2 Main Manufacturers of Watermark Security Paper Core Raw Materials

10.3 Midstream Analysis

10.4 Downstream Analysis

10.5 Watermark Security Paper Production Mode

10.6 Watermark Security Paper Procurement Model

10.7 Watermark Security Paper Industry Sales Model and Sales Channels

10.7.1 Watermark Security Paper Sales Model

10.7.2 Watermark Security Paper Typical Distributors

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

12.1 Methodology

12.2 Research Process and Data Source

12.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. World Watermark Security Paper Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World Watermark Security Paper Production Value by Region (2021-2026) & (USD Million)

Table 3. World Watermark Security Paper Production Value by Region (2027-2032) & (USD Million)

Table 4. World Watermark Security Paper Production Value Market Share by Region (2021-2026)

Table 5. World Watermark Security Paper Production Value Market Share by Region (2027-2032)

Table 6. World Watermark Security Paper Production by Region (2021-2026) & (Kilotons)

Table 7. World Watermark Security Paper Production by Region (2027-2032) & (Kilotons)

Table 8. World Watermark Security Paper Production Market Share by Region (2021-2026)

Table 9. World Watermark Security Paper Production Market Share by Region (2027-2032)

Table 10. World Watermark Security Paper Average Price by Region (2021-2026) & (US\$/Ton)

Table 11. World Watermark Security Paper Average Price by Region (2027-2032) & (US\$/Ton)

Table 12. Watermark Security Paper Major Market Trends

Table 13. World Watermark Security Paper Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (Kilotons)

Table 14. World Watermark Security Paper Consumption by Region (2021-2026) & (Kilotons)

Table 15. World Watermark Security Paper Consumption Forecast by Region (2027-2032) & (Kilotons)

Table 16. World Watermark Security Paper Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key Watermark Security Paper Producers in 2025

Table 18. World Watermark Security Paper Production by Manufacturer (2021-2026) & (Kilotons)

Table 19. Production Market Share of Key Watermark Security Paper Producers in 2025

Table 20. World Watermark Security Paper Average Price by Manufacturer (2021-2026) & (US\$/Ton)

Table 21. Global Watermark Security Paper Company Evaluation Quadrant

Table 22. World Watermark Security Paper Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and Watermark Security Paper Production Site of Key Manufacturer

Table 24. Watermark Security Paper Market: Company Product Type Footprint

Table 25. Watermark Security Paper Market: Company Product Application Footprint

Table 26. Watermark Security Paper Competitive Factors

Table 27. Watermark Security Paper New Entrant and Capacity Expansion Plans

Table 28. Watermark Security Paper Mergers & Acquisitions Activity

Table 29. United States VS China Watermark Security Paper Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China Watermark Security Paper Production Comparison, (2021 & 2025 & 2032) & (Kilotons)

Table 31. United States VS China Watermark Security Paper Consumption Comparison, (2021 & 2025 & 2032) & (Kilotons)

Table 32. United States Based Watermark Security Paper Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers Watermark Security Paper Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers Watermark Security Paper Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers Watermark Security Paper Production (2021-2026) & (Kilotons)

Table 36. United States Based Manufacturers Watermark Security Paper Production Market Share (2021-2026)

Table 37. China Based Watermark Security Paper Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers Watermark Security Paper Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers Watermark Security Paper Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Watermark Security Paper Production, (2021-2026) & (Kilotons)

Table 41. China Based Manufacturers Watermark Security Paper Production Market

Share (2021-2026)

Table 42. Rest of World Based Watermark Security Paper Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers Watermark Security Paper Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers Watermark Security Paper Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers Watermark Security Paper Production, (2021-2026) & (Kilotons)

Table 46. Rest of World Based Manufacturers Watermark Security Paper Production Market Share (2021-2026)

Table 47. World Watermark Security Paper Production Value by Type, (USD Million), 2021 & 2025 & 2032

Table 48. World Watermark Security Paper Production by Type (2021-2026) & (Kilotons)

Table 49. World Watermark Security Paper Production by Type (2027-2032) & (Kilotons)

Table 50. World Watermark Security Paper Production Value by Type (2021-2026) & (USD Million)

Table 51. World Watermark Security Paper Production Value by Type (2027-2032) & (USD Million)

Table 52. World Watermark Security Paper Average Price by Type (2021-2026) & (US\$/Ton)

Table 53. World Watermark Security Paper Average Price by Type (2027-2032) & (US\$/Ton)

Table 54. World Watermark Security Paper Production Value by Gram, (USD Million), 2021 & 2025 & 2032

Table 55. World Watermark Security Paper Production by Gram (2021-2026) & (Kilotons)

Table 56. World Watermark Security Paper Production by Gram (2027-2032) & (Kilotons)

Table 57. World Watermark Security Paper Production Value by Gram (2021-2026) & (USD Million)

Table 58. World Watermark Security Paper Production Value by Gram (2027-2032) & (USD Million)

Table 59. World Watermark Security Paper Average Price by Gram (2021-2026) & (US\$/Ton)

Table 60. World Watermark Security Paper Average Price by Gram (2027-2032) & (US\$/Ton)

- Table 61. World Watermark Security Paper Production Value by Manufacturing Techniques, (USD Million), 2021 & 2025 & 2032
- Table 62. World Watermark Security Paper Production by Manufacturing Techniques (2021-2026) & (Kilotons)
- Table 63. World Watermark Security Paper Production by Manufacturing Techniques (2027-2032) & (Kilotons)
- Table 64. World Watermark Security Paper Production Value by Manufacturing Techniques (2021-2026) & (USD Million)
- Table 65. World Watermark Security Paper Production Value by Manufacturing Techniques (2027-2032) & (USD Million)
- Table 66. World Watermark Security Paper Average Price by Manufacturing Techniques (2021-2026) & (US\$/Ton)
- Table 67. World Watermark Security Paper Average Price by Manufacturing Techniques (2027-2032) & (US\$/Ton)
- Table 68. World Watermark Security Paper Production Value by Application, (USD Million), 2021 & 2025 & 2032
- Table 69. World Watermark Security Paper Production by Application (2021-2026) & (Kilotons)
- Table 70. World Watermark Security Paper Production by Application (2027-2032) & (Kilotons)
- Table 71. World Watermark Security Paper Production Value by Application (2021-2026) & (USD Million)
- Table 72. World Watermark Security Paper Production Value by Application (2027-2032) & (USD Million)
- Table 73. World Watermark Security Paper Average Price by Application (2021-2026) & (US\$/Ton)
- Table 74. World Watermark Security Paper Average Price by Application (2027-2032) & (US\$/Ton)
- Table 75. Giesecke+Devrient Basic Information, Manufacturing Base and Competitors
- Table 76. Giesecke+Devrient Major Business
- Table 77. Giesecke+Devrient Watermark Security Paper Product and Services
- Table 78. Giesecke+Devrient Watermark Security Paper Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 79. Giesecke+Devrient Recent Developments/Updates
- Table 80. Giesecke+Devrient Competitive Strengths & Weaknesses
- Table 81. Crane Currency Basic Information, Manufacturing Base and Competitors
- Table 82. Crane Currency Major Business
- Table 83. Crane Currency Watermark Security Paper Product and Services

Table 84. Crane Currency Watermark Security Paper Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 85. Crane Currency Recent Developments/Updates

Table 86. Crane Currency Competitive Strengths & Weaknesses

Table 87. Arjowiggins Group Basic Information, Manufacturing Base and Competitors

Table 88. Arjowiggins Group Major Business

Table 89. Arjowiggins Group Watermark Security Paper Product and Services

Table 90. Arjowiggins Group Watermark Security Paper Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 91. Arjowiggins Group Recent Developments/Updates

Table 92. Arjowiggins Group Competitive Strengths & Weaknesses

Table 93. De La Rue Basic Information, Manufacturing Base and Competitors

Table 94. De La Rue Major Business

Table 95. De La Rue Watermark Security Paper Product and Services

Table 96. De La Rue Watermark Security Paper Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 97. De La Rue Recent Developments/Updates

Table 98. De La Rue Competitive Strengths & Weaknesses

Table 99. Louisenthal Basic Information, Manufacturing Base and Competitors

Table 100. Louisenthal Major Business

Table 101. Louisenthal Watermark Security Paper Product and Services

Table 102. Louisenthal Watermark Security Paper Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 103. Louisenthal Recent Developments/Updates

Table 104. Louisenthal Competitive Strengths & Weaknesses

Table 105. Landqart Basic Information, Manufacturing Base and Competitors

Table 106. Landqart Major Business

Table 107. Landqart Watermark Security Paper Product and Services

Table 108. Landqart Watermark Security Paper Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 109. Landqart Recent Developments/Updates

Table 110. Landqart Competitive Strengths & Weaknesses

Table 111. Portals Paper Ltd Basic Information, Manufacturing Base and Competitors

Table 112. Portals Paper Ltd Major Business

Table 113. Portals Paper Ltd Watermark Security Paper Product and Services

Table 114. Portals Paper Ltd Watermark Security Paper Production (Kilotons), Price

(US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 115. Portals Paper Ltd Recent Developments/Updates

Table 116. Portals Paper Ltd Competitive Strengths & Weaknesses

Table 117. VHP Security Paper Basic Information, Manufacturing Base and Competitors

Table 118. VHP Security Paper Major Business

Table 119. VHP Security Paper Watermark Security Paper Product and Services

Table 120. VHP Security Paper Watermark Security Paper Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 121. VHP Security Paper Recent Developments/Updates

Table 122. VHP Security Paper Competitive Strengths & Weaknesses

Table 123. Drewsen Spezialpapiere Basic Information, Manufacturing Base and Competitors

Table 124. Drewsen Spezialpapiere Major Business

Table 125. Drewsen Spezialpapiere Watermark Security Paper Product and Services

Table 126. Drewsen Spezialpapiere Watermark Security Paper Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 127. Drewsen Spezialpapiere Recent Developments/Updates

Table 128. Drewsen Spezialpapiere Competitive Strengths & Weaknesses

Table 129. Goznak Basic Information, Manufacturing Base and Competitors

Table 130. Goznak Major Business

Table 131. Goznak Watermark Security Paper Product and Services

Table 132. Goznak Watermark Security Paper Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 133. Goznak Recent Developments/Updates

Table 134. Goznak Competitive Strengths & Weaknesses

Table 135. Xianhe Group Basic Information, Manufacturing Base and Competitors

Table 136. Xianhe Group Major Business

Table 137. Xianhe Group Watermark Security Paper Product and Services

Table 138. Xianhe Group Watermark Security Paper Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 139. Xianhe Group Recent Developments/Updates

Table 140. Xianhe Group Competitive Strengths & Weaknesses

Table 141. Laiyang Yintong Paper Industry Basic Information, Manufacturing Base and Competitors

Table 142. Laiyang Yintong Paper Industry Major Business

Table 143. Laiyang Yintong Paper Industry Watermark Security Paper Product and Services

Table 144. Laiyang Yintong Paper Industry Watermark Security Paper Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 145. Laiyang Yintong Paper Industry Recent Developments/Updates

Table 146. Laiyang Yintong Paper Industry Competitive Strengths & Weaknesses

Table 147. Wenzhou Haoge Anti-counterfeiting Technology Basic Information, Manufacturing Base and Competitors

Table 148. Wenzhou Haoge Anti-counterfeiting Technology Major Business

Table 149. Wenzhou Haoge Anti-counterfeiting Technology Watermark Security Paper Product and Services

Table 150. Wenzhou Haoge Anti-counterfeiting Technology Watermark Security Paper Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 151. Wenzhou Haoge Anti-counterfeiting Technology Recent Developments/Updates

Table 152. Wenzhou Haoge Anti-counterfeiting Technology Competitive Strengths & Weaknesses

Table 153. Taizhong Special Paper Basic Information, Manufacturing Base and Competitors

Table 154. Taizhong Special Paper Major Business

Table 155. Taizhong Special Paper Watermark Security Paper Product and Services

Table 156. Taizhong Special Paper Watermark Security Paper Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 157. Taizhong Special Paper Recent Developments/Updates

Table 158. Taizhong Special Paper Competitive Strengths & Weaknesses

Table 159. Guangdong Qiaosheng Anti-counterfeiting Materials Basic Information, Manufacturing Base and Competitors

Table 160. Guangdong Qiaosheng Anti-counterfeiting Materials Major Business

Table 161. Guangdong Qiaosheng Anti-counterfeiting Materials Watermark Security Paper Product and Services

Table 162. Guangdong Qiaosheng Anti-counterfeiting Materials Watermark Security Paper Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 163. Guangdong Qiaosheng Anti-counterfeiting Materials Recent Developments/Updates

Table 164. Guangdong Qiaosheng Anti-counterfeiting Materials Competitive Strengths

& Weaknesses

Table 165. Dongguan Tiansheng Special Paper Products Basic Information, Manufacturing Base and Competitors

Table 166. Dongguan Tiansheng Special Paper Products Major Business

Table 167. Dongguan Tiansheng Special Paper Products Watermark Security Paper Product and Services

Table 168. Dongguan Tiansheng Special Paper Products Watermark Security Paper Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 169. Dongguan Tiansheng Special Paper Products Recent Developments/Updates

Table 170. Dongguan Tiansheng Special Paper Products Competitive Strengths & Weaknesses

Table 171. Oji Holdings Basic Information, Manufacturing Base and Competitors

Table 172. Oji Holdings Major Business

Table 173. Oji Holdings Watermark Security Paper Product and Services

Table 174. Oji Holdings Watermark Security Paper Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 175. Oji Holdings Recent Developments/Updates

Table 176. Oji Holdings Competitive Strengths & Weaknesses

Table 177. KOMSCO Basic Information, Manufacturing Base and Competitors

Table 178. KOMSCO Major Business

Table 179. KOMSCO Watermark Security Paper Product and Services

Table 180. KOMSCO Watermark Security Paper Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 181. KOMSCO Recent Developments/Updates

Table 182. KOMSCO Competitive Strengths & Weaknesses

Table 183. Global Key Players of Watermark Security Paper Upstream (Raw Materials)

Table 184. Global Watermark Security Paper Typical Customers

Table 185. Watermark Security Paper Typical Distributors

List Of Figures

LIST OF FIGURES

- Figure 1. Watermark Security Paper Picture
- Figure 2. World Watermark Security Paper Production Value: 2021 & 2025 & 2032, (USD Million)
- Figure 3. World Watermark Security Paper Production Value and Forecast (2021-2032) & (USD Million)
- Figure 4. World Watermark Security Paper Production (2021-2032) & (Kilotons)
- Figure 5. World Watermark Security Paper Average Price (2021-2032) & (US\$/Ton)
- Figure 6. World Watermark Security Paper Production Value Market Share by Region (2021-2032)
- Figure 7. World Watermark Security Paper Production Market Share by Region (2021-2032)
- Figure 8. North America Watermark Security Paper Production (2021-2032) & (Kilotons)
- Figure 9. Europe Watermark Security Paper Production (2021-2032) & (Kilotons)
- Figure 10. China Watermark Security Paper Production (2021-2032) & (Kilotons)
- Figure 11. Japan Watermark Security Paper Production (2021-2032) & (Kilotons)
- Figure 12. India Watermark Security Paper Production (2021-2032) & (Kilotons)
- Figure 13. Southeast Asia Watermark Security Paper Production (2021-2032) & (Kilotons)
- Figure 14. Watermark Security Paper Market Drivers
- Figure 15. Factors Affecting Demand
- Figure 16. World Watermark Security Paper Consumption (2021-2032) & (Kilotons)
- Figure 17. World Watermark Security Paper Consumption Market Share by Region (2021-2032)
- Figure 18. United States Watermark Security Paper Consumption (2021-2032) & (Kilotons)
- Figure 19. China Watermark Security Paper Consumption (2021-2032) & (Kilotons)
- Figure 20. Europe Watermark Security Paper Consumption (2021-2032) & (Kilotons)
- Figure 21. Japan Watermark Security Paper Consumption (2021-2032) & (Kilotons)
- Figure 22. South Korea Watermark Security Paper Consumption (2021-2032) & (Kilotons)
- Figure 23. ASEAN Watermark Security Paper Consumption (2021-2032) & (Kilotons)
- Figure 24. India Watermark Security Paper Consumption (2021-2032) & (Kilotons)
- Figure 25. Producer Shipments of Watermark Security Paper by Manufacturer Revenue (\$MM) and Market Share (%): 2025
- Figure 26. Global Four-firm Concentration Ratios (CR4) for Watermark Security Paper

Markets in 2025

Figure 27. Global Four-firm Concentration Ratios (CR8) for Watermark Security Paper Markets in 2025

Figure 28. United States VS China: Watermark Security Paper Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States VS China: Watermark Security Paper Production Market Share Comparison (2021 & 2025 & 2032)

Figure 30. United States VS China: Watermark Security Paper Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 31. United States Based Manufacturers Watermark Security Paper Production Market Share 2025

Figure 32. China Based Manufacturers Watermark Security Paper Production Market Share 2025

Figure 33. Rest of World Based Manufacturers Watermark Security Paper Production Market Share 2025

Figure 34. World Watermark Security Paper Production Value by Type, (USD Million), 2021 & 2025 & 2032

Figure 35. World Watermark Security Paper Production Value Market Share by Type in 2025

Figure 36. White Watermark

Figure 37. Black Watermark

Figure 38. Mixed Black and White Watermark

Figure 39. World Watermark Security Paper Production Market Share by Type (2021-2032)

Figure 40. World Watermark Security Paper Production Value Market Share by Type (2021-2032)

Figure 41. World Watermark Security Paper Average Price by Type (2021-2032) & (US\$/Ton)

Figure 42. World Watermark Security Paper Production Value by Gram, (USD Million), 2021 & 2025 & 2032

Figure 43. World Watermark Security Paper Production Value Market Share by Gram in 2025

Figure 44. 50-80g/m²

Figure 45. 80-120g/m²

Figure 46. >200g/m²

Figure 47. World Watermark Security Paper Production Market Share by Gram (2021-2032)

Figure 48. World Watermark Security Paper Production Value Market Share by Gram (2021-2032)

Figure 49. World Watermark Security Paper Average Price by Gram (2021-2032) & (US\$/Ton)

Figure 50. World Watermark Security Paper Production Value by Manufacturing Techniques, (USD Million), 2021 & 2025 & 2032

Figure 51. World Watermark Security Paper Production Value Market Share by Manufacturing Techniques in 2025

Figure 52. Traditional Watermarked Paper

Figure 53. Chemical Watermarked Paper

Figure 54. Electronic Watermarked Paper

Figure 55. Fiber Anti-counterfeiting Paper

Figure 56. World Watermark Security Paper Production Market Share by Manufacturing Techniques (2021-2032)

Figure 57. World Watermark Security Paper Production Value Market Share by Manufacturing Techniques (2021-2032)

Figure 58. World Watermark Security Paper Average Price by Manufacturing Techniques (2021-2032) & (US\$/Ton)

Figure 59. World Watermark Security Paper Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 60. World Watermark Security Paper Production Value Market Share by Application in 2025

Figure 61. Banknotes

Figure 62. Documents

Figure 63. Labels

Figure 64. Official Seals

Figure 65. Others

Figure 66. World Watermark Security Paper Production Market Share by Application (2021-2032)

Figure 67. World Watermark Security Paper Production Value Market Share by Application (2021-2032)

Figure 68. World Watermark Security Paper Average Price by Application (2021-2032) & (US\$/Ton)

Figure 69. Watermark Security Paper Industry Chain

Figure 70. Watermark Security Paper Procurement Model

Figure 71. Watermark Security Paper Sales Model

Figure 72. Watermark Security Paper Sales Channels, Direct Sales, and Distribution

Figure 73. Methodology

Figure 74. Research Process and Data Source

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