

Global Watermark Security Paper Market Growth 2026-2032

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Abstracts

The global Watermark Security Paper market size is predicted to grow from US\$ 693 million in 2025 to US\$ 923 million in 2032; it is expected to grow at a CAGR of 4.3% from 2026 to 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.

LP Information, Inc. (LPI) ' newest research report, the 'Watermark Security Paper Industry Forecast' looks at past sales and reviews total world Watermark Security Paper sales in 2025, providing a comprehensive analysis by region and market sector of projected Watermark Security Paper sales for 2026 through 2032. With Watermark Security Paper sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Watermark Security Paper industry.

This Insight Report provides a comprehensive analysis of the global Watermark Security Paper landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity.

This report also analyzes the strategies of leading global companies with a focus on Watermark Security Paper portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Watermark Security Paper market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Watermark Security Paper and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Watermark Security Paper.

This report presents a comprehensive overview, market shares, and growth opportunities of Watermark Security Paper market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

White Watermark

Black Watermark

Mixed Black and White Watermark

Segmentation by Gram:

50-80g/m²

80-120g/m²

>200g/m²

Segmentation by Manufacturing Techniques:

Traditional Watermarked Paper

Chemical Watermarked Paper

Electronic Watermarked Paper

Fiber Anti-counterfeiting Paper

Segmentation by Application:

Banknotes

Documents

Labels

Official Seals

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

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 Addressed in this Report

What is the 10-year outlook for the global Watermark Security Paper market?

What factors are driving Watermark Security Paper market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Watermark Security Paper market opportunities vary by end market size?

How does Watermark Security Paper break out by Type, by Application?

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