

AI Watermarking Market: Current Analysis and Forecast (2025-2033)

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Abstracts

The AI Watermarking Market is witnessing a robust growth rate of 24.96% within the forecast period (2025- 2033F). AI watermarking is a technique that integrates a unique and recognizable tag or pattern in AI-generated content, images, audio, videos, and text to prevent plagiarism. That tag or pattern is called a watermark, which can be scanned by algorithms. With the exposure of generative AI tools such as ChatGPT and Midjourney, anyone can create images, videos, or content that looks genuine and real, which can spread misinformation among people. For example, a fake image of the Pope wearing a white puffer jacket went viral in the year 2023 because people thought it was real. In fact, that image was created by Midjourney, which is a generative AI tool. Scammers can use these tools to create phishing emails that look professional and trick people into clicking on the link, giving away passwords and data, as normal emails are full of grammatical mistakes. Scammers can even clone the voice of any person using AI, hence tricking people by pretending to be a bank manager, executive, friend, or family member and asking them to send money or share confidential information. In the USA, in 2023, a scammer cloned a girl's voice and called her family member, and almost tricked them into paying the ransom amount.

To prevent such acts and activities, watermarks are linked in AI-generated content to distinguish between which ones are real and which ones are fake. For instance, in 2025, the government of the United States of America, under President Donald Trump, invested USD 500 billion in the AI ecosystem. Moreover, in 2024, the US private investment in AI reached USD 109.1 billion. In July 2023, President Donald Trump started a program named "America's AI Action Plan", aimed to boost the U.S. position in AI through innovations, enhancing infrastructure, and security.

Based on component, the AI Watermarking market is segmented into Software,

Hardware, and Services. In 2024, the software segment dominated the market and is expected to maintain its leading position throughout the forecast period. With the rise in generative AI models, the demand for security against theft, model cloning, and phishing attacks is increasing as well, and software is coded with algorithms and APIs that can find the image, video, audio, or content that is AI-generated. Furthermore, software is flexible in nature; therefore, it can be integrated into any development department. Further, companies are looking for tools that can easily be integrated with their AI pipelines, cloud platforms, and existing systems. Moreover, generative AI tools such as ChatGPT, DALLE, and Midjourney operate on a cloud platform, and a software solution goes well with a cloud platform. Software can be operated remotely and can process large amounts of AI output daily. The attributes such as flexibility, scalability, and compatibility with cloud-based platforms make software dominate the market.

Based on the deployment mode, the AI Watermarking market is segmented into On-Premise and Cloud-Based. The cloud-based deployment mode held the largest market share in 2024. Companies are adopting cloud platforms due to their scalability, efficiency, and integration with the enterprise model. Cloud watermarking offers real-time authentication and monitoring. Additionally, based on the organization's needs, they can scale up or scale down, paying for what they have used. Moreover, businesses create and share a large amount of AI-generated content globally. By using cloud services, they can organize, manage, and access content easily. The growing demand for SaaS based products has increased the adoption of cloud platforms. The increased use of the remote and hybrid work model has boosted demand for the on-premises model. The team can access, share, and monitor the AI-generated content globally. For example, Google Cloud Vertex AI offers a watermarking solution, allowing users to label and monitor their content without disrupting the user experience.

Based on watermark type, the AI Watermarking market is segmented into Invisible Watermark, Visible Watermark, and Hybrid Watermark. In 2024, the invisible watermark segment dominated the market and is expected to maintain its leading position throughout the forecast period. The invisible watermarks cannot be seen by humans; they can be detected by algorithms only. The increased use of generative AI tools such as ChatGPT and Midjourney has boosted their demand. Moreover, government, companies, and organizations are adopting a platform that can label AI-generated content without affecting user experience. For instance, the EU government has mandated the use of AI watermarking in the content. Furthermore, it cannot be affected by the common

techniques such as cropping of the image, compression, or conversion of one file format to another. Additionally, these watermarks are used to detect leaks of images, videos, and content. Another important factor that is driving growth is its versatile nature (which can be flexible or easily adaptable to audio, video, and images). The burgeoning adoption of watermarks in various industries, such as entertainment, publishing, advertising, and cybersecurity, utilizes these watermarks in text, audio, video, and images, which has created an immense demand for the segment. Additionally, the growing concern for intellectual property safety and digital risk management is increasing the use of invisible watermarks. For example, in July 2024, SNAPTAG, a Korean-based company that specializes in providing watermark technology solutions catering to a wide range of customers through LAB-GUARD, accepted a total funding of ~USD 8 million in a series B round funding.

Based on applications, the AI Watermarking market is segmented into Media & Entertainment, Government, Healthcare, IT & Telecommunication, and Others. In 2024, the media & entertainment segment dominated the market and is expected to maintain its leading position throughout the forecast period. The use of streaming platforms and user-generated content has increased rapidly; hence, the risks of plagiarism, redistribution, and piracy have also grown. Content providers and distributors are adopting more advanced watermarking methods to watermark their media. This makes it easier for them to track distribution and detect piracy. As the demand for on-demand and real-time content, movies, and TV shows is increasing, it becomes more important to find safe and scalable ways to protect it. Moreover, the increased use of distribution networks is further fuelling the demand for watermarking. As OTT platforms provide their access to content globally, they watermark the content to preservation of the authenticity. Additionally, the use of AI-generated content and images, such as advertising, animation, and visuals in the entertainment industry, is further increasing the demand for watermarking. For example, Netflix utilizes forensic watermarking in its content, such as movies, series, and documentaries, to maintain its authenticity and detect plagiarism of the content. If content is leaked online, the watermark will help in finding the source, whether it is leaked by a distributor or a subscriber. For instance, Sony has collaborated with Verimatrix to integrate a watermark in its content.

For a better understanding of the market of the AI Watermarking market, the market is analyzed based on its worldwide presence in countries such as North America (The US, Canada, and Rest of North America), Europe (Germany, The

UK, France, Italy, Spain, Rest of Europe), Asia-Pacific (China, Japan, India, South Korea, Rest of Asia-Pacific), Rest of World. The North America AI Watermarking market dominated the global AI Watermarking market in 2024 and is forecasted to remain in this position in the forecast period. This is due to the early adoption of technologies, specifically in cloud computing, cybersecurity, and SaaS applications. Furthermore, government programs such as Coalition for Content Provenance and Authenticity (C2PA) provide a global standard for content labeling, to ensure content originality, hence making watermarking an important aspect. Such programs have strengthened its position and encouraged both public and private firms to use watermarking technologies against deepfakes, misinformation, and content plagiarism. Additionally, the region's strong infrastructure and extensive use of AI content have significantly boosted its growth. Moreover, to ensure content authenticity and protect it from plagiarism, the use of AI watermark increased as generative AI is now used for content writing, media, entertainment, and advertising. For instance, Cisco has also provided a fund of USD 1 million for the enhancement of AI tools and startups.

Some of the major players operating in the market include Google, Digimarc Corporation, steg.ai, IMATAG, Digify, Vertimatrix, Vobile Group Limited, RESEMBLE.AI, Meta, and Amazon Web Services, Inc.

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