

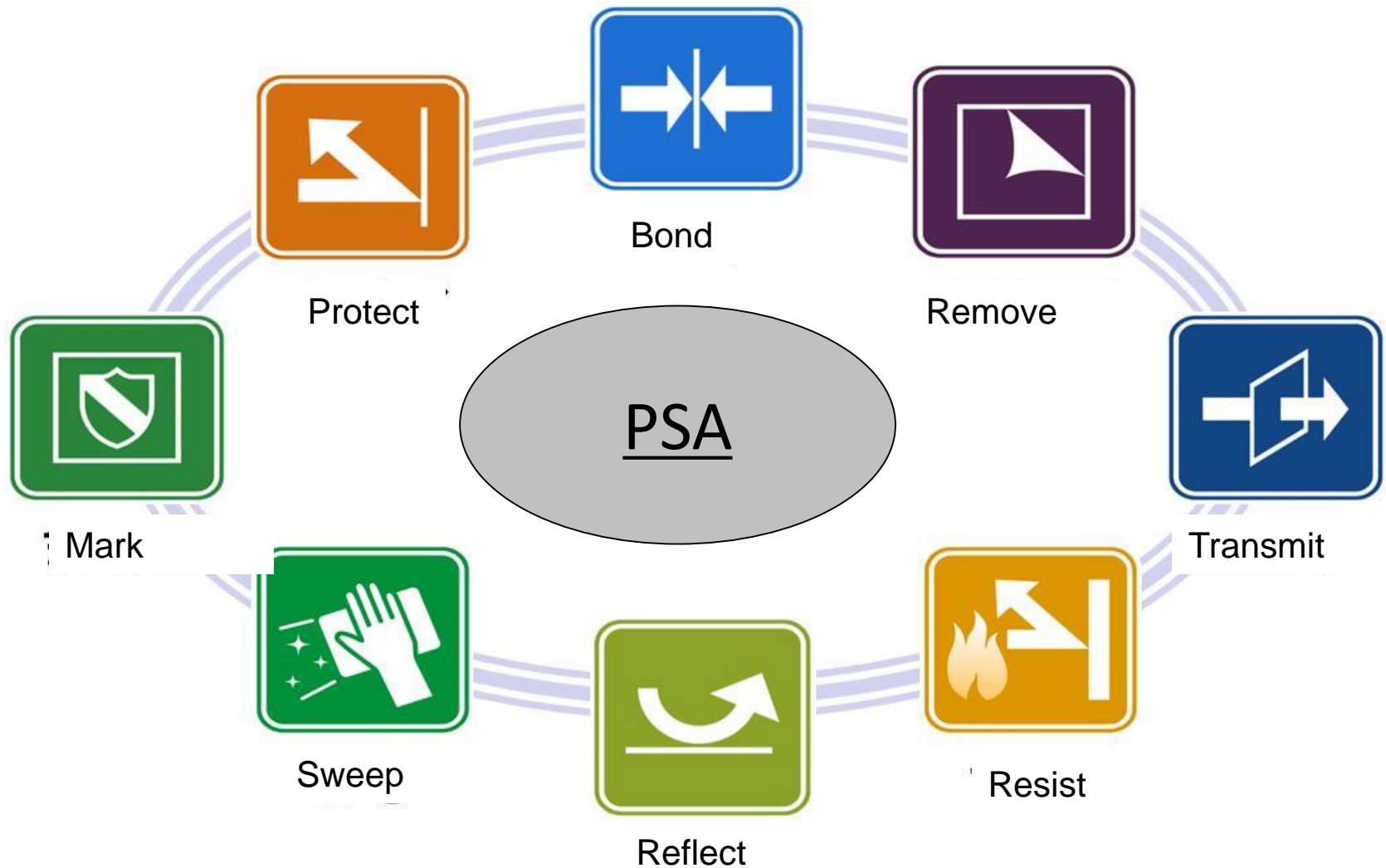
Adhesive tape business market in Japan



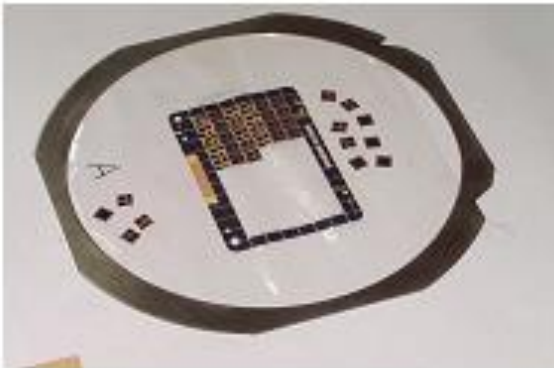
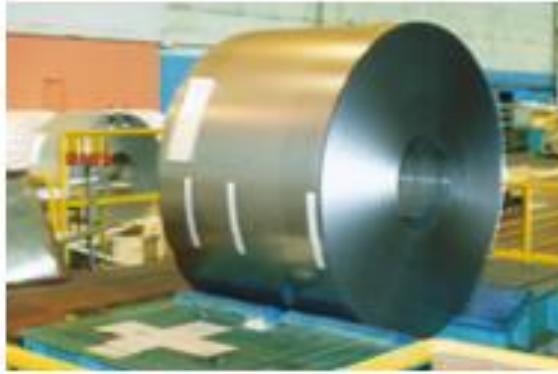
JATMA
Kensei Takahashi

1. Function of adhesive tape

Not only bonding, PSA have many function



2. Adhesive tape application



2. Application



2. Application of PSA tape

日本粘着テープ工業会

PSA tape gives the solution to customer by combination of various function.

Electronics
Electrical products

Power energy

Building,
Construction



Automotive

Agriculture

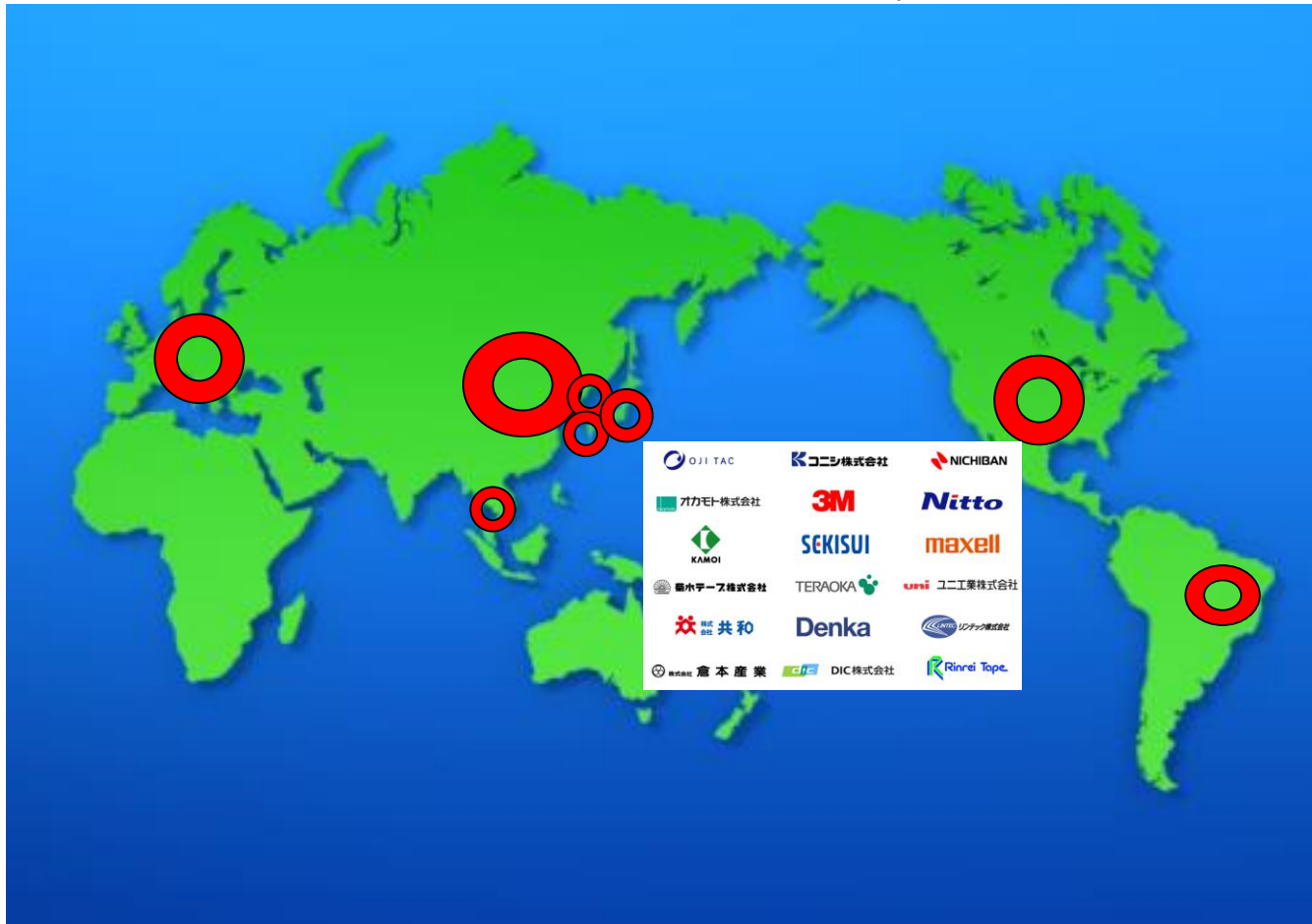
Medical

3. PSA tape world market

World PSA tape sales in 2013 40billion \$ (Freedonia

Japanese PSA tape sales in 2016 3.7billions \$(400Bil JPY)

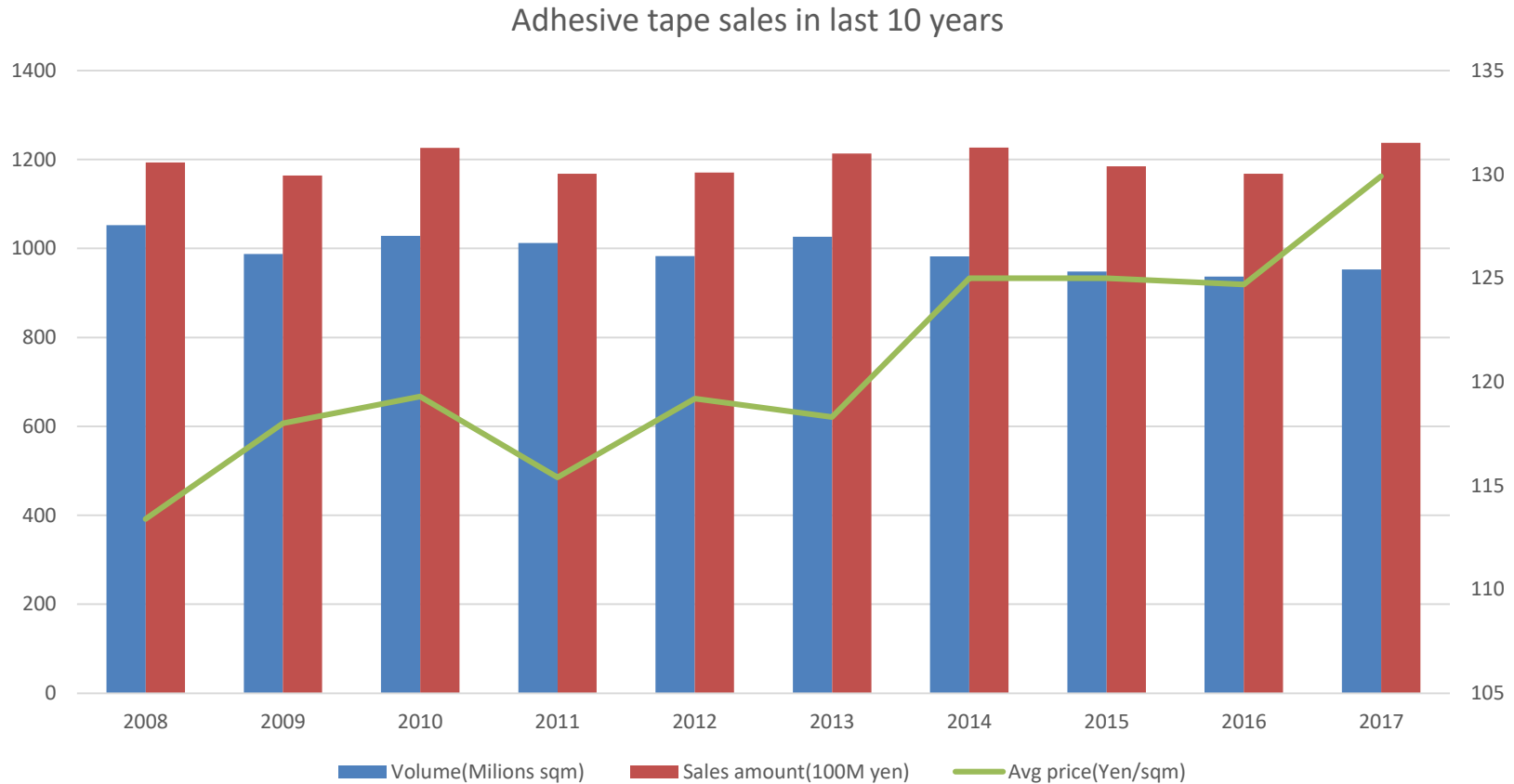
less than 10% of world market.



4. JATMA



4. PSA tape sales from JATMA Statistics



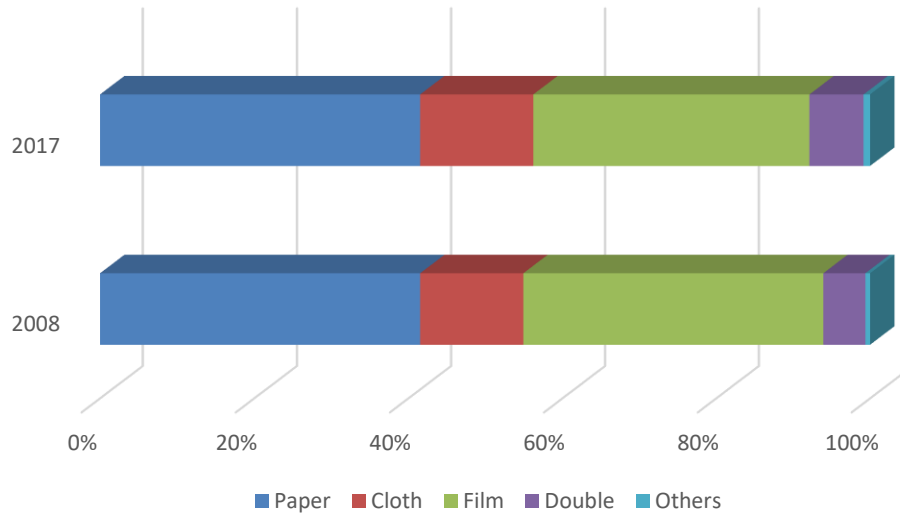
2017 Sales volume is 953 millions square meters, and declining gradually over the last decade

2017 Sales value is 123.7 billions yen, highest over the last decade

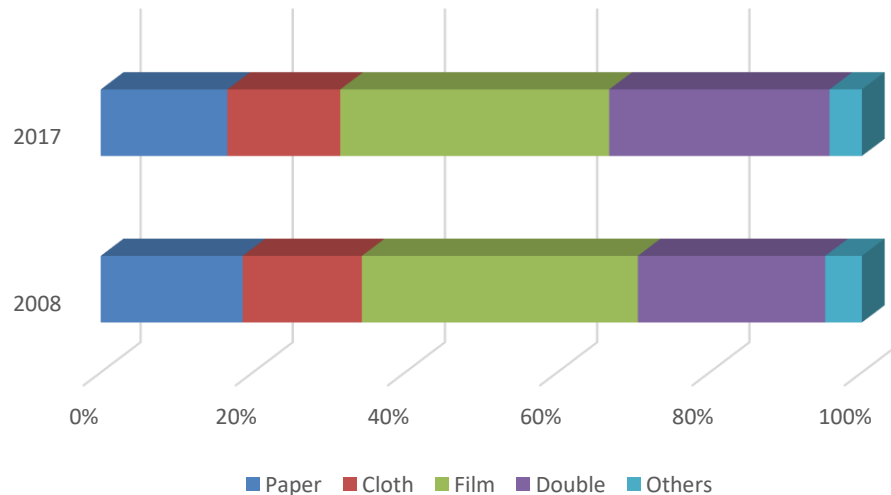
Overall price has risen 11% over the last decade

4. JATMA Statistics

Composition by volume



Composition by sales amount



The volume of paper tape keeps 41%, but sales amount declines to 16%.

Cloth tape keeps 15% volume, sales value also same.

Film tape keeps 36-39% volume, sales value keeps 35-36%.

The volume percentage of Double side tape has risen from 5% to 7% over the last decade, the sales value percentage is very high, 29% in 2017

4-1 Paper tape

① Packaging tape

- Kraft paper

② Masking tape

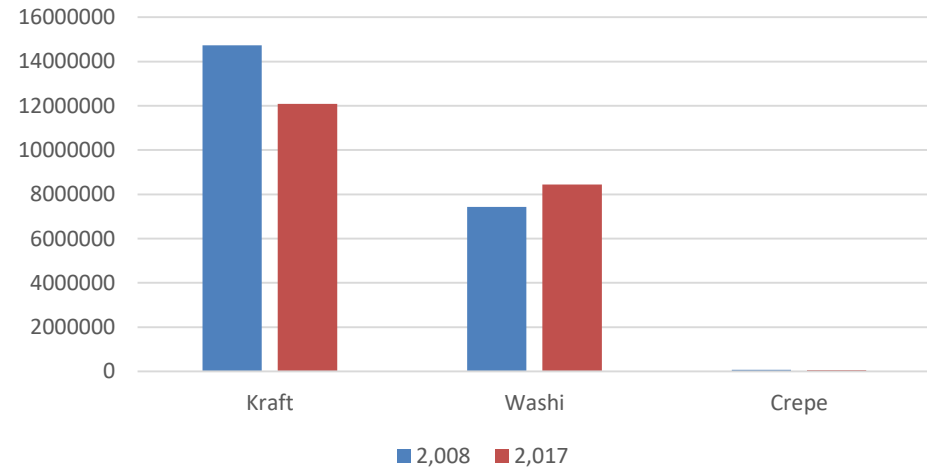
- Washi
- Crepe



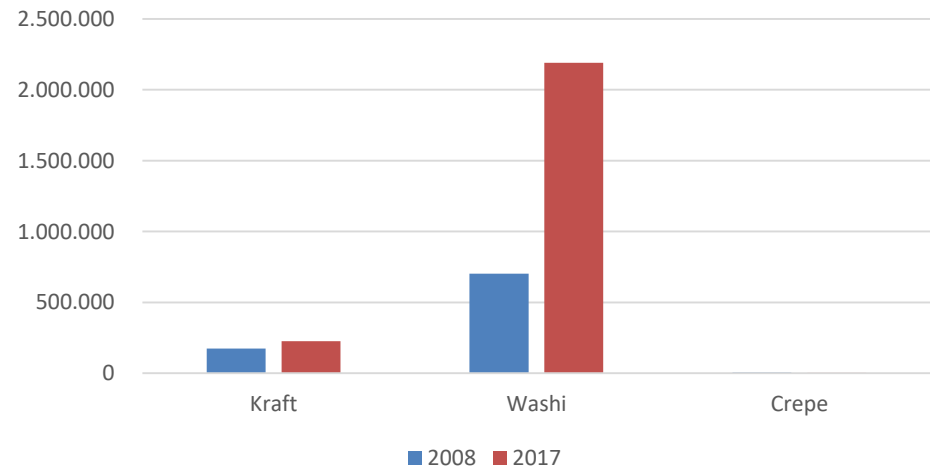
▪ The volume of Kraft tape shares 80% from paper total, sales value is 58% 2017

▪ Washi tape is growing by export

Paper tape Sales value



Paper tape Export sales



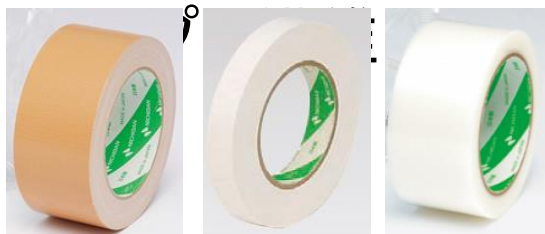
4-2 Cloth tape

① Packaging

Staple fiber

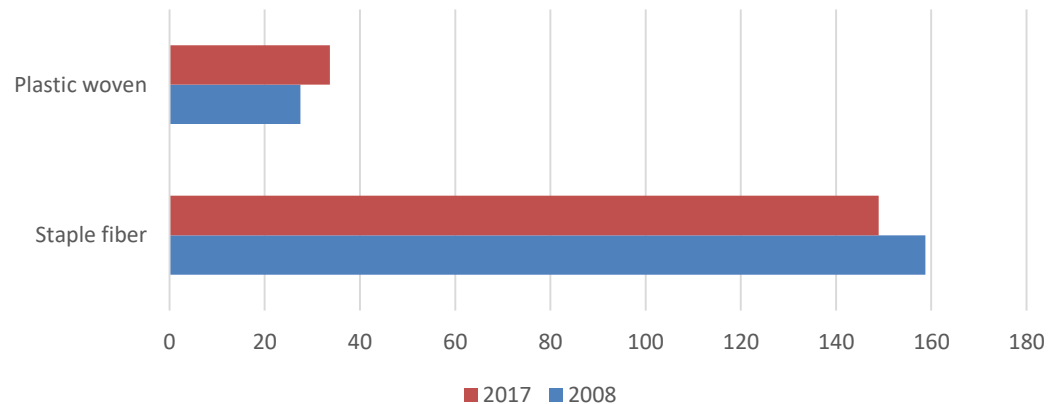
② Protection

Plastic woven

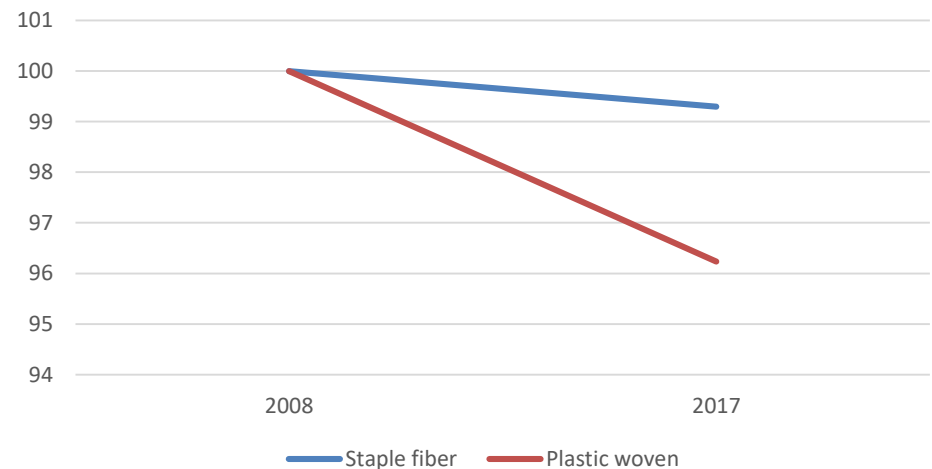


Cloth tape total sales value and volume has no change, but Plastic woven tape is growing and price going down.

Cloth tape Sales value
(100 millions yen)



Cloth tape sales price going down



4-3 Film tape

① Packaging

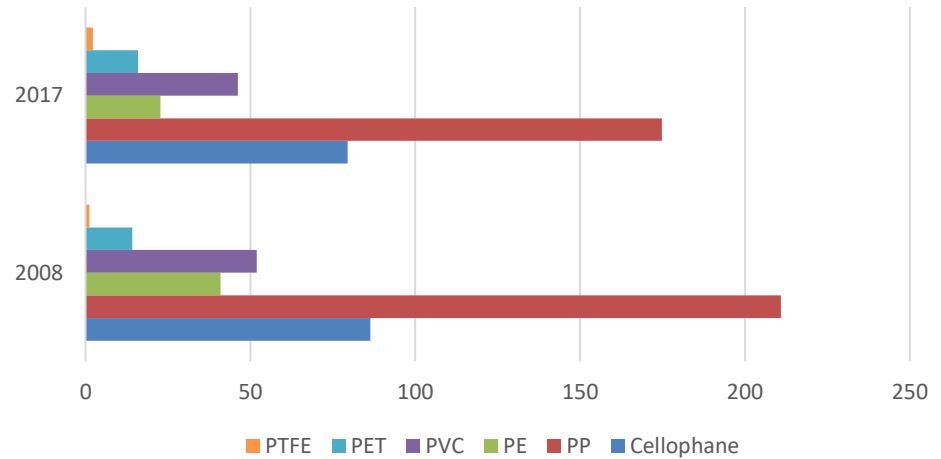
- Cellophane
- OPP

② Electronic

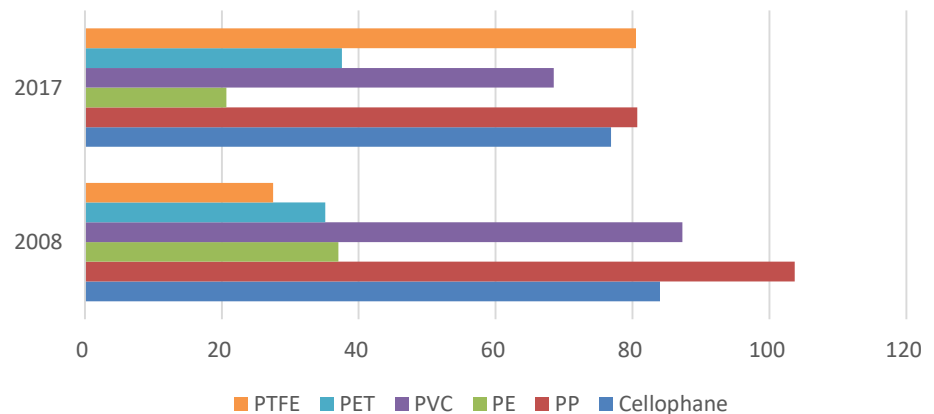
- PET
- PVC
- PE
- PTFE



Film tape 2008-2017 Volume(Million sqm)



Film tape sales value(2008-2017)
(100millions yen)



Film tape volume is declining,
2017 OPP 20% less than 2008.
Sales value of PTFE is growing
up dramatically

4-4 Double side tape

① Bonding

- Paper
- Film
- Foam
- Cloth

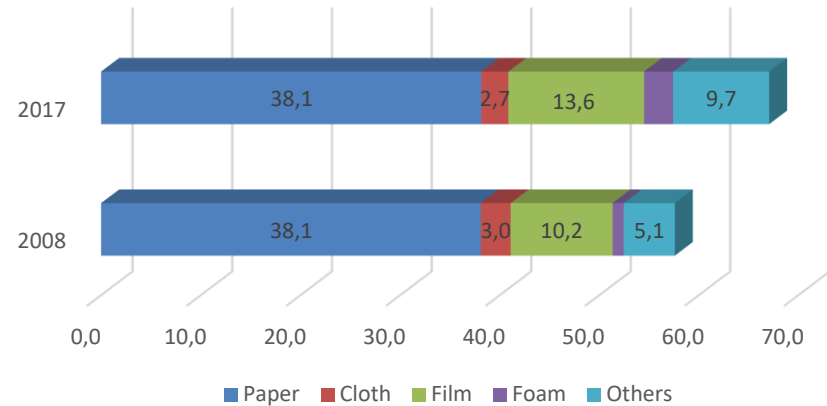
② Assembly Process

- Film
- adhesive film

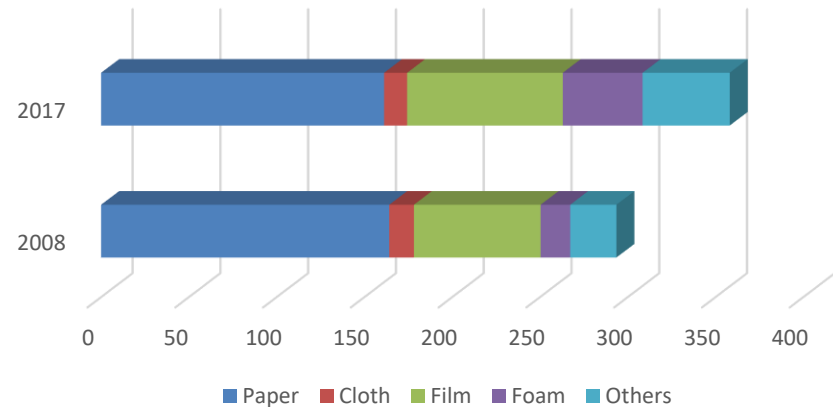


Volume and Sales value of double side tape increased 16%(volume) 21%(Value) over the last decade. Adhesive film and foam W side tape for assembly process growing rapidly.

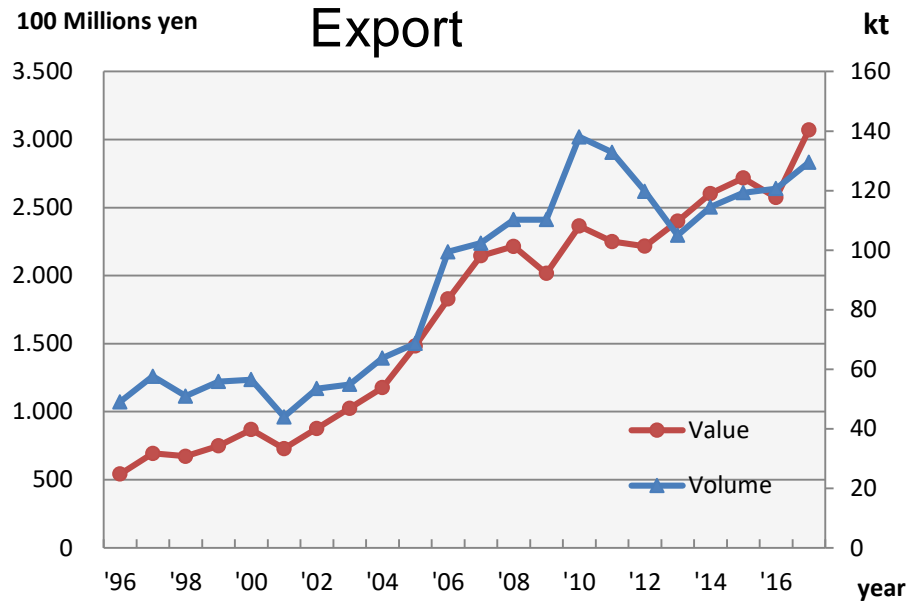
Volume composition of W-side tape (Million sqm)



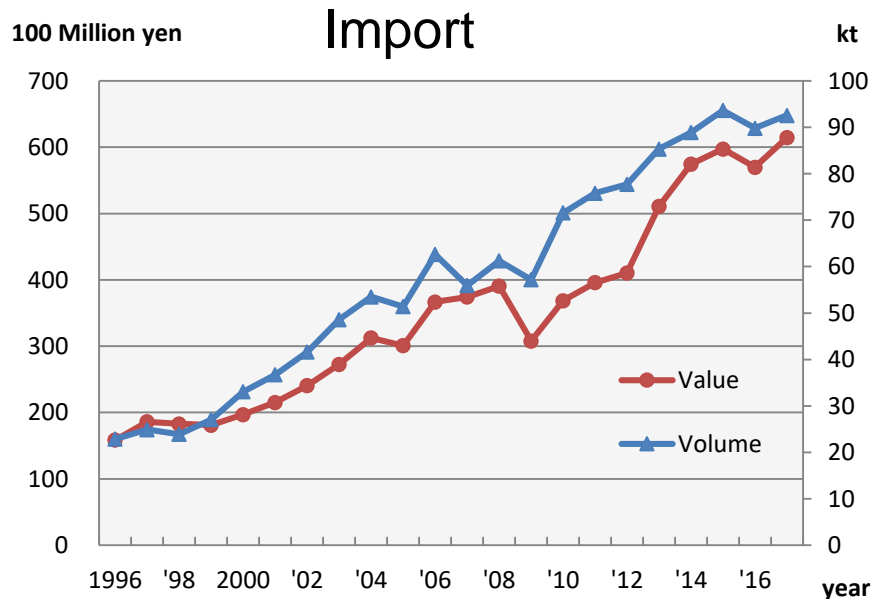
Sales value composition of W-side tape (100 millions yen)



5. Tapes import & export from Japan Tariff Association



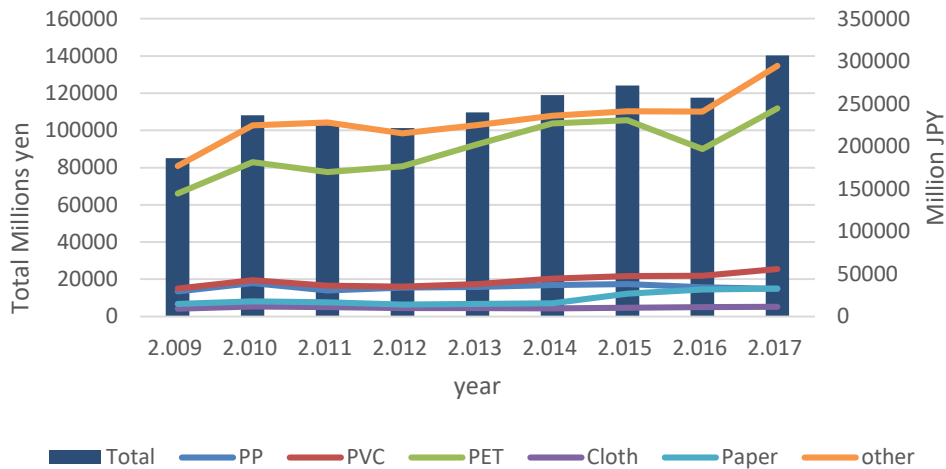
2017 Export value of adhesive tape (include processed products) is 307 billions yen.



2017 Import value of adhesive tape is 61 billions yen.
 Import value is 1/5 of Export value.
 Both import and export is increasing

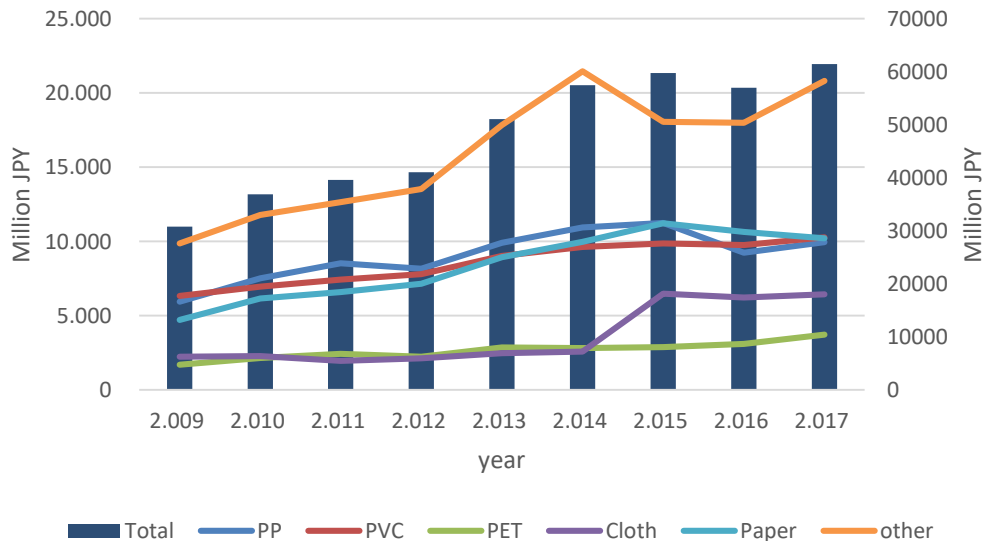
5. Tapes import & export from the customs statistics

Export with Item



Export value consists in 80% of PET tape and others(include processed products).
 PET and others keeps going up.
 PP,PVC,Cloth,Paper are very small

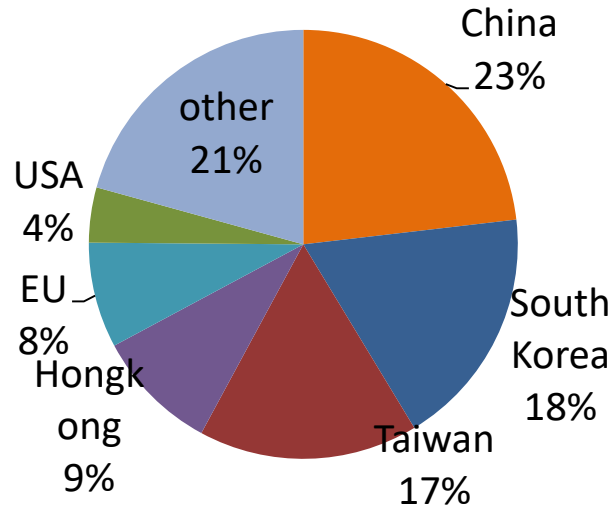
Import by item



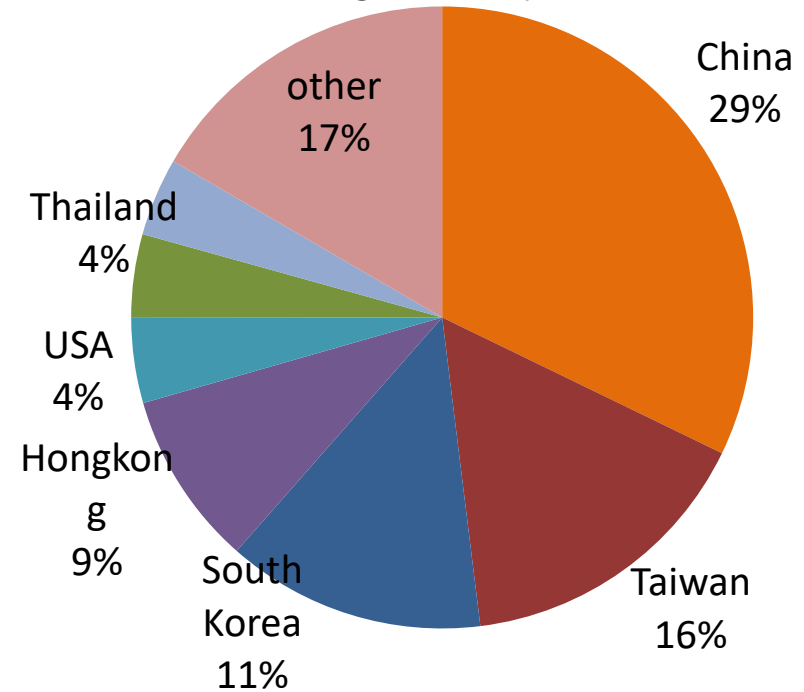
Import value is proportionally dependent with PP ,PVC and Paper.
 Cloth has increased from 2014.
 PET is very small counter to the export.

5. Tapes import & export from the customs statistics

Exporting country 2008



Exporting country 2017

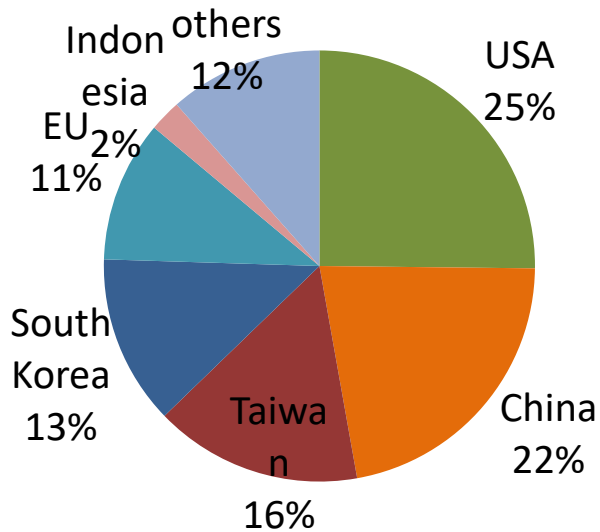


2008 total exporting value is 221 billions yen. 2017 total exporting value is 307 billions yen

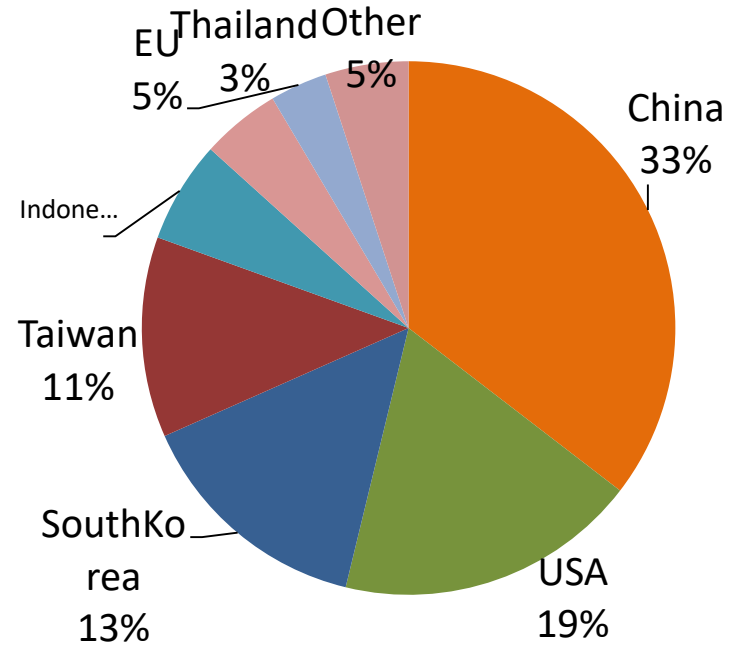
Tapes export has increased from 221 billions yen to 307 billions over the last 10 years. Exporting country are majorly Asian countries such as China, Korea Thailand

5. Tapes import & export from the customs statistics

Importing country 2008



Importing country 2017



2008 total importing value is 39 billions yen. 2017 total exporting value is 61.5 billions yen

Tapes import has increased from 39 billions yen to 61.5 billions over the last 10 years. Importing country are USA and Asian countries such as China, South Korea Indonesia.

6. Summary

- Japanese PSA tape market volume is shrinking slowly.
- Export sales leads the tape production, Asian countries shares 2/3 of all export of PSA tape.
- Much of the Japanese domestic market for conventional tape products is gradually being taken over by the other countries products
- Tape manufacturer advanced domestic high value-added production.
- Double side tape is growing consistently.