

Adhesive Tape Market in Japan during last 5 years



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JATMA secretary
Kensei Takahashi

Japan Adhesive Tape Manufacturers Association

□ Purpose

JATMA aims at overall improvement growth of Japanese adhesive tape, and aims at contributing to general public benefit.

□ Chairman Toshiaki Takatu Representative director of Nichiban, Co., Ltd

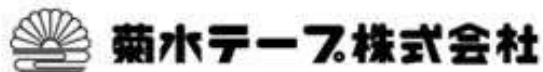
□ URL <https://jatma.jp/>

□ Established 30/Sep/1961

□ Membership Member 14 Companies (Adhesive tape manufacture & sales company)

□ Supporting Member 81 Companies (Adhesive tape related company)

14Member (Adhesive tape manufacturing and sales in Japan)



Activities of JATMA

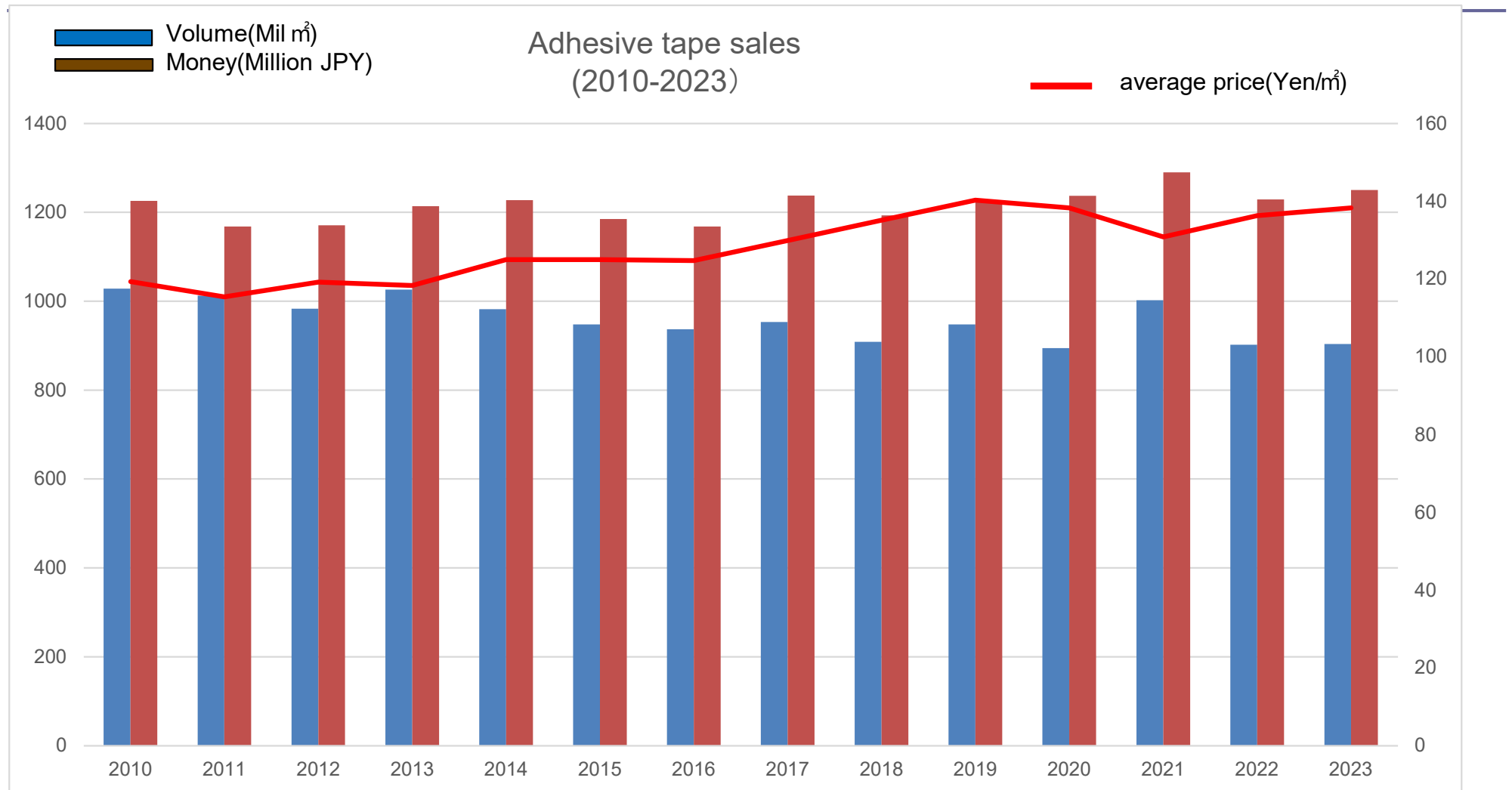
- ❑ Making the Adhesive tape shipment statistics
- ❑ Making Japanese Industrial Standards Committee(JIS) of related adhesive tapes. maintains 16 standards
- ❑ Promote Standardization.
- ❑ Holding an Adhesive Technical seminar. Educational seminar.



Adhesive tape market categorized into 5 groups

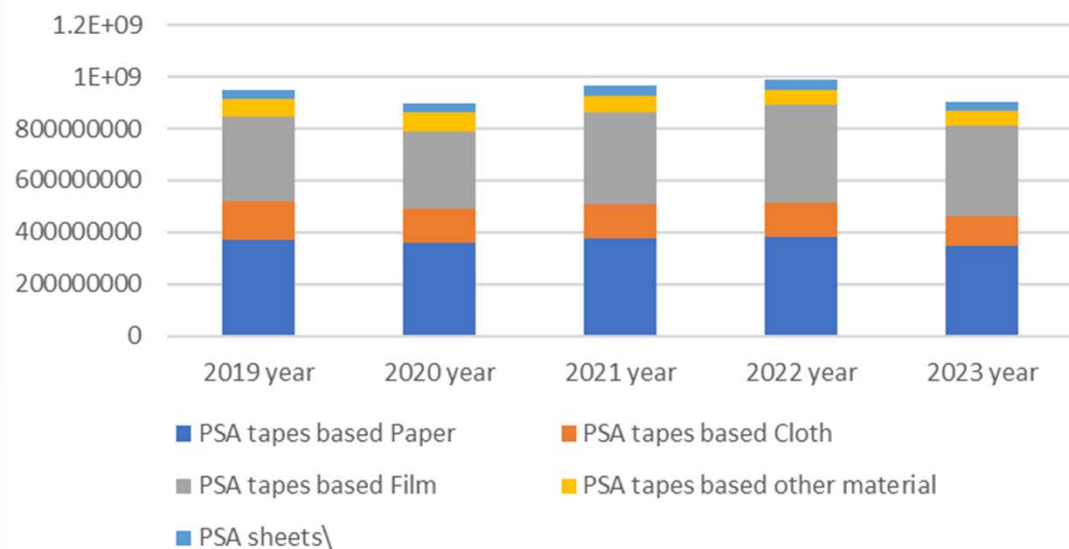
Category	Tape
Paper	<ul style="list-style-type: none">• Kraft paper tape for packaging• Washi tape for masking, packaging• Crape paper for masking
Cloth	<ul style="list-style-type: none">• Rayon cloth for packaging, protection• Plastic wooven for protection, packaging• Cotton cloth for insulation
Film	<ul style="list-style-type: none">• Cellophane tape for packaging, stationary, office• OPP tape for packaging• Polyester tape , PVC tape for electric appli, packaging• PE tape for protection• PTFE tape for electric application
Special	<ul style="list-style-type: none">• Double side adhesive tape• Metal tape (Alumi, Cu)• Filament tape for fixing
Sheet	<ul style="list-style-type: none">• Label• Display decoration

PSA Tape Sales in Japan (JATMA)

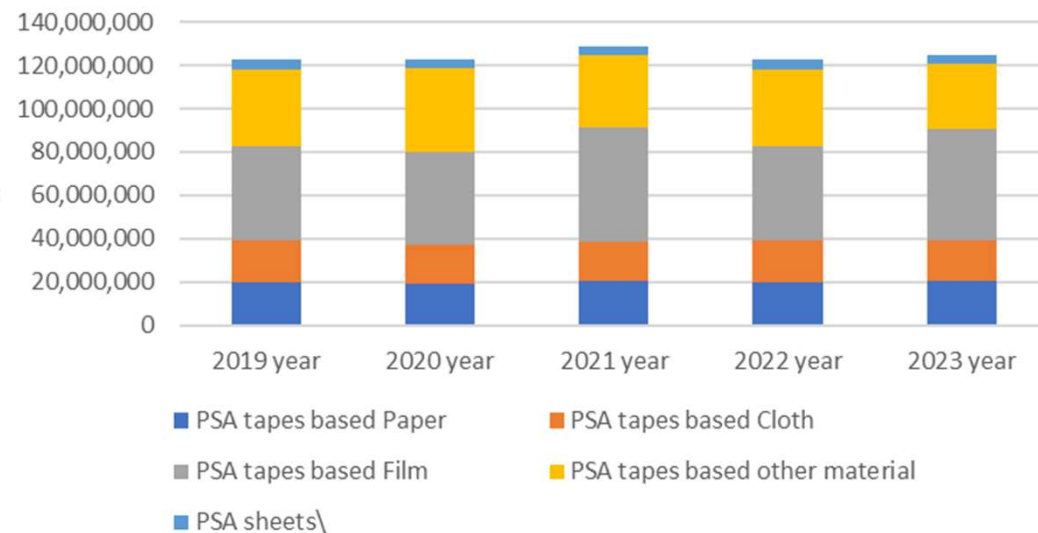


JATMA membership companies shipment statistics

Tape Sales Volume(sqm)



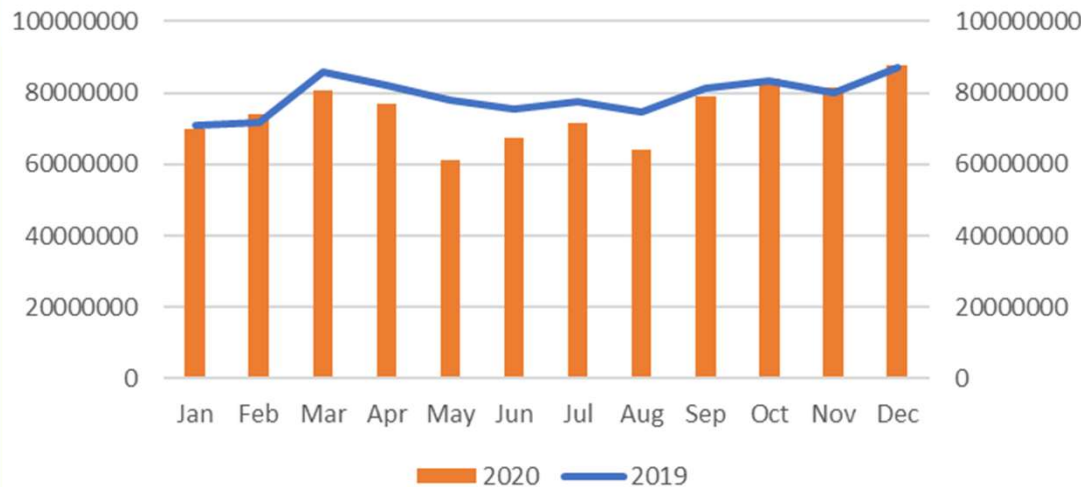
Tape sales (1000JPY)



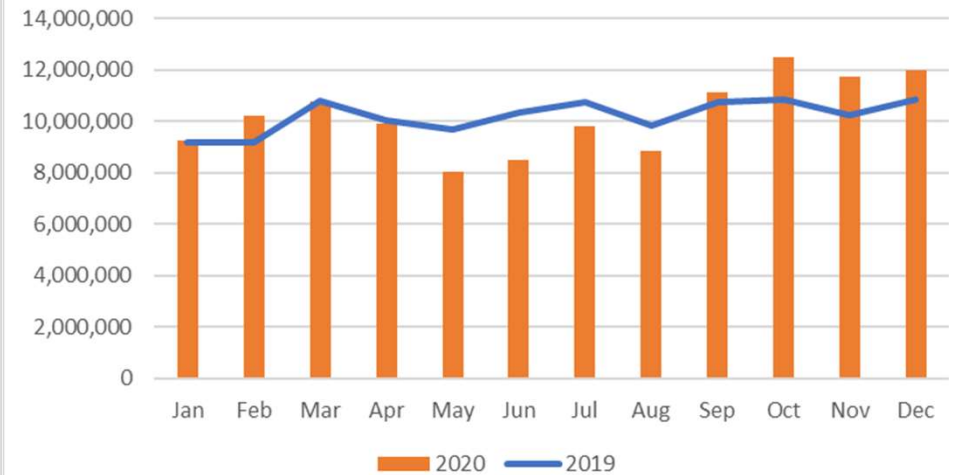
Volume (m ²) 2023	2019 year	2020 year	2021 year	2022 year	2023 year
PSA tapes based Paper	371,586,837	359,801,688	378,184,236	379,665,287	346,953,693
PSA tapes based Cloth	146,021,434	133,058,190	131,962,622	133,281,567	117,412,162
PSA tapes based Film	327,661,014	295,784,191	352,562,078	375,869,231	347,531,601
PSA tapes based other material	67,044,949	74,432,778	64,271,859	59,579,647	55,280,343
PSA sheets¥	35,268,667	34,503,052	36,915,409	38,651,032	36,601,113
SUM	947,582,900	897,579,898	963,896,206	987,046,764	903,778,912
Sales(1000¥)	2019 year	2020 year	2021 year	2022 year	2023 year
PSA tapes based Paper	19,974,184	19,310,129	20,552,582	19,974,184	20,291,226
PSA tapes based Cloth	19,447,314	17,676,254	17,784,480	19,447,314	18,747,144
PSA tapes based Film	43,235,700	42,920,044	52,842,319	43,235,700	51,655,019
PSA tapes based other material	35,550,762	38,589,572	33,394,976	35,550,762	29,761,790
PSA sheets¥	4,233,902	4,100,081	4,348,442	4,233,902	4,566,725
SUM	122,441,861	122,596,080	128,922,799	122,441,861	125,021,903

What happened in 2020 to effect our business.

Tapes monthly sales volume in Japan(m2)



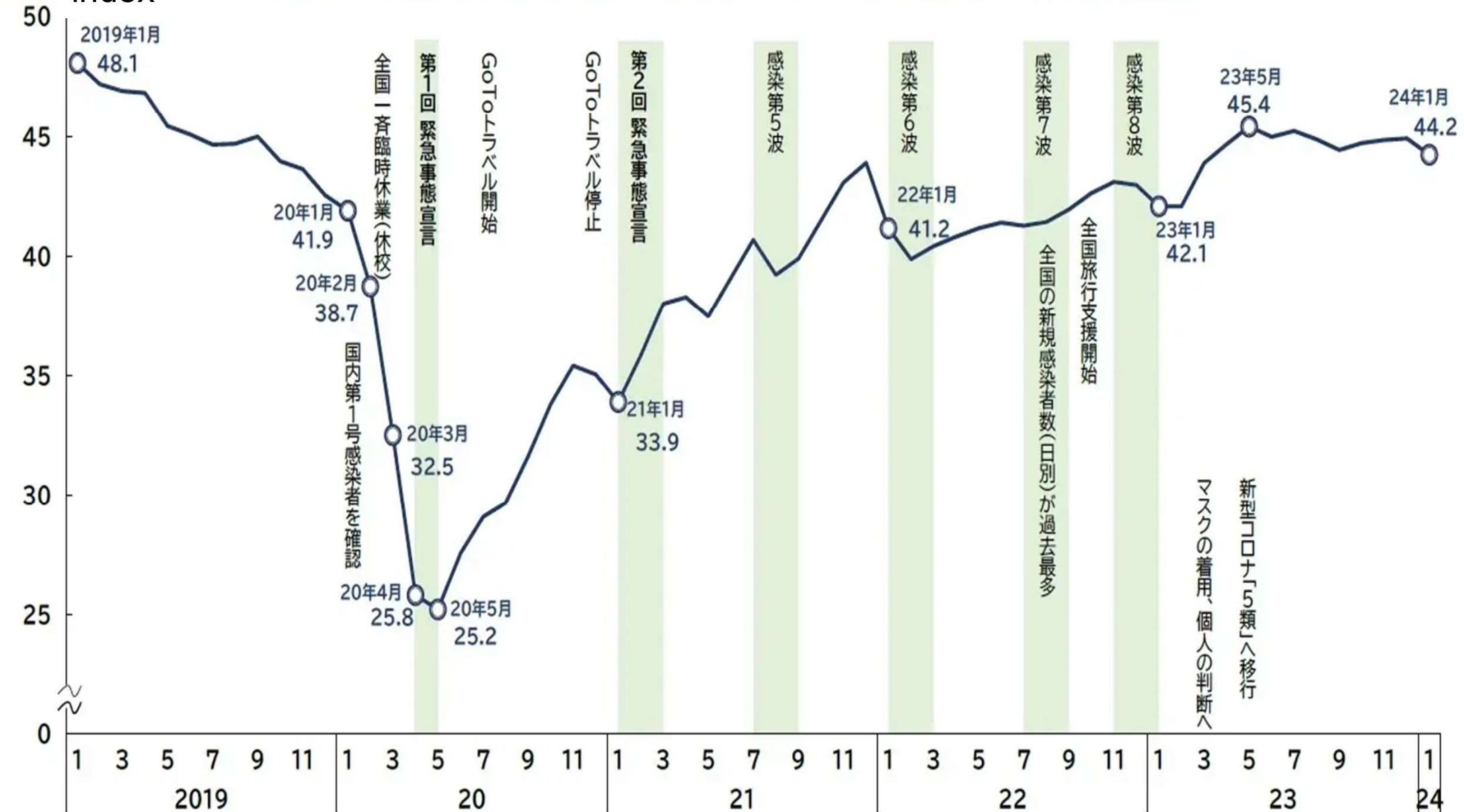
Tapes monthly sales in Japan (Thousands of JPY)



- Jan.2020 First positive patient Covid 19 virus in Japan
- April.2020 Declaration of a state of emergency by Government. Japanese major cities were blocked and we refrained from going out unless necessary
- May 2020 Tape consumption and production dropped because of a voluntary restraint
- July Moderation of movement restriction
- Nov Requested to step up the infection control
- Dec 26 Imposed a new entry ban to non Japanese

diffusion
index
(景気D)

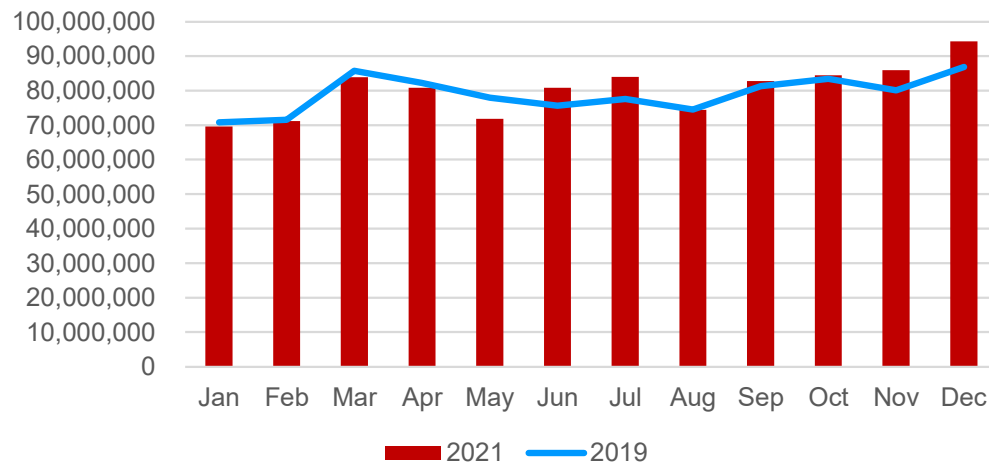
Diffusion index related to the infection wave



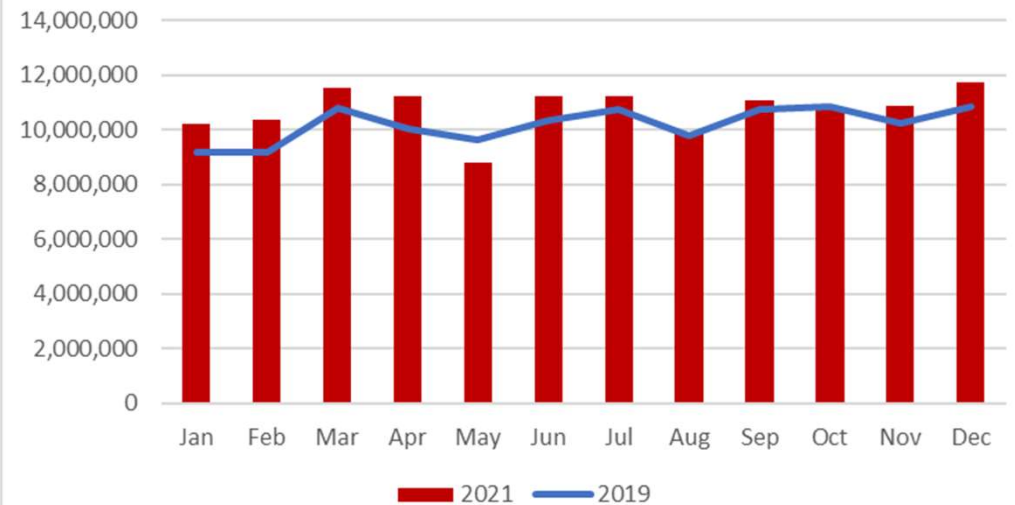
※各種報道資料などから帝国データバンクが作成

What happened in 2021 to effect our business

Tapes monthly sales volume in Japan(m2)



Tapes monthly sales in Japan (Thousands of JPY)

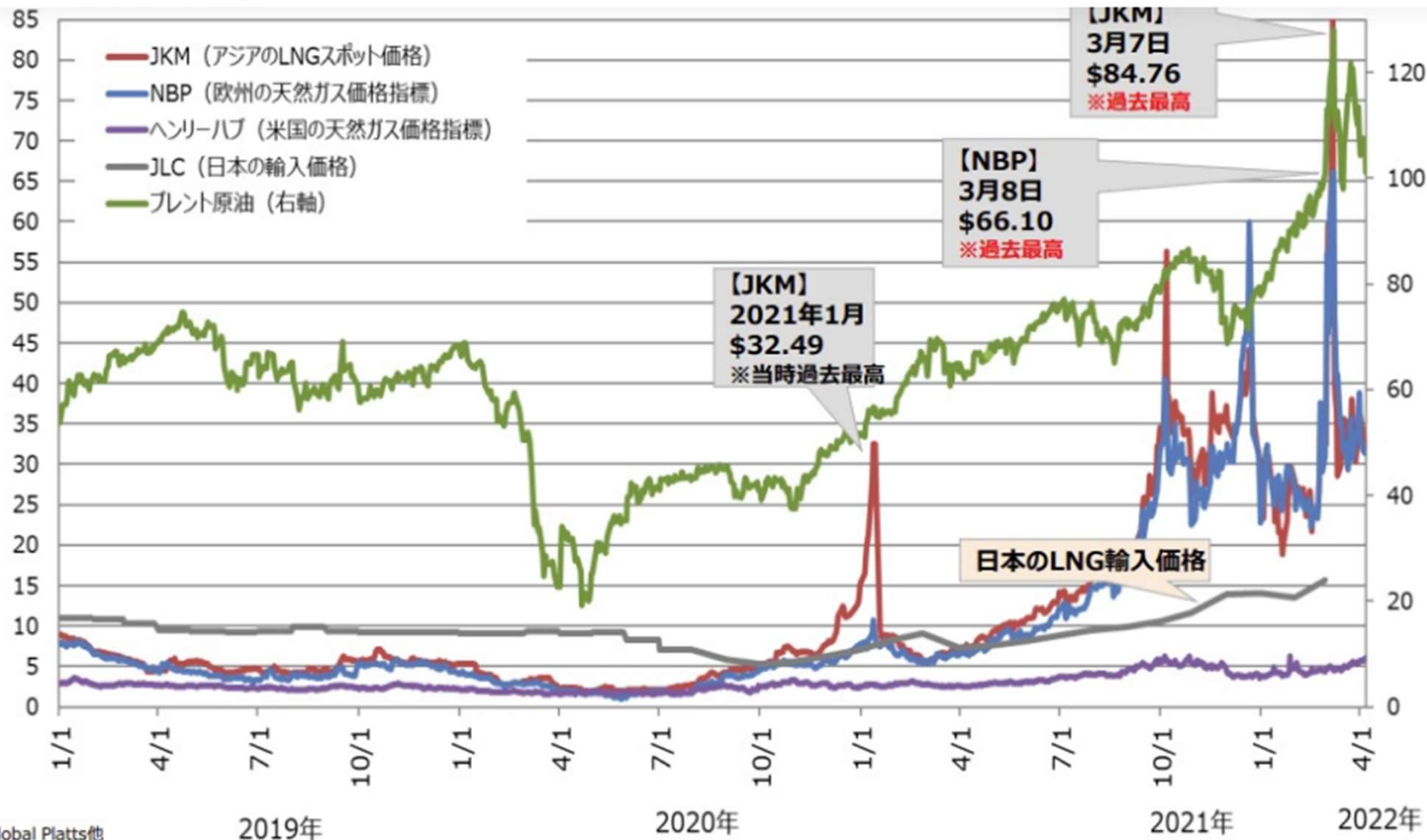


- Jan 2021, Shortage of container, raw material
- March 2021. Material price rising energy cost , logistics cost elevation
- Sep 2021 Tape maker released price improvement

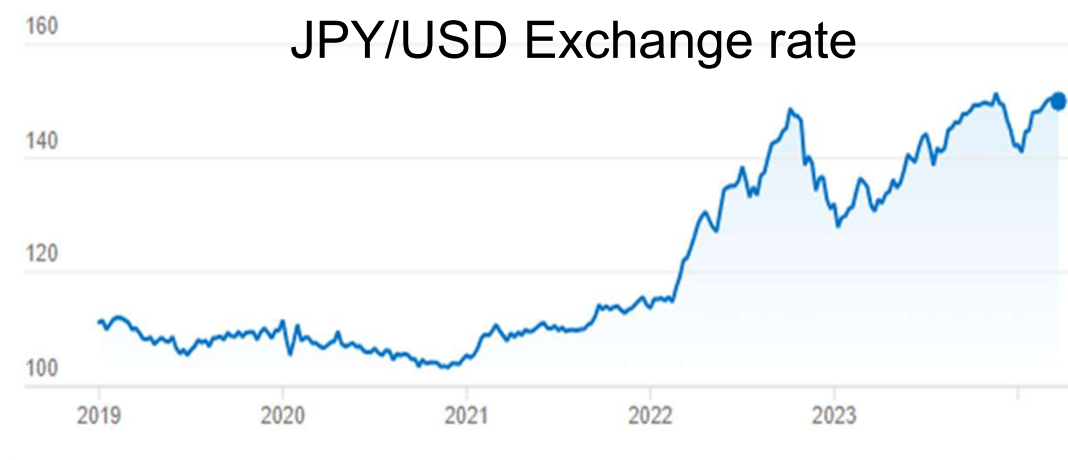
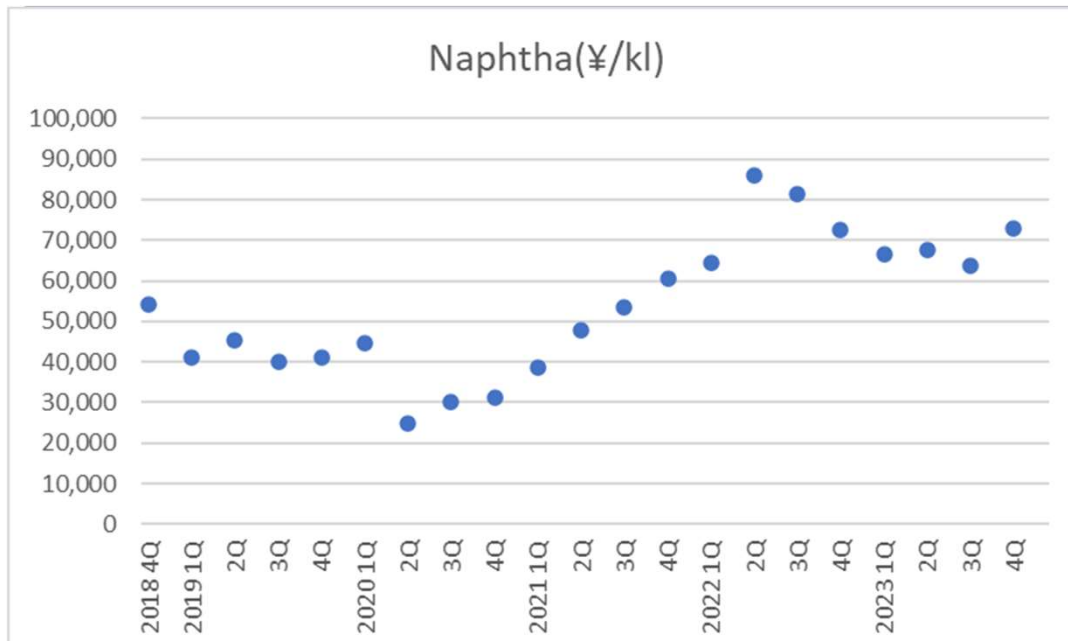
Energy cost, LNG rising



エネルギーコストの急騰とLNG価格の高騰



Petrochemical material price rising

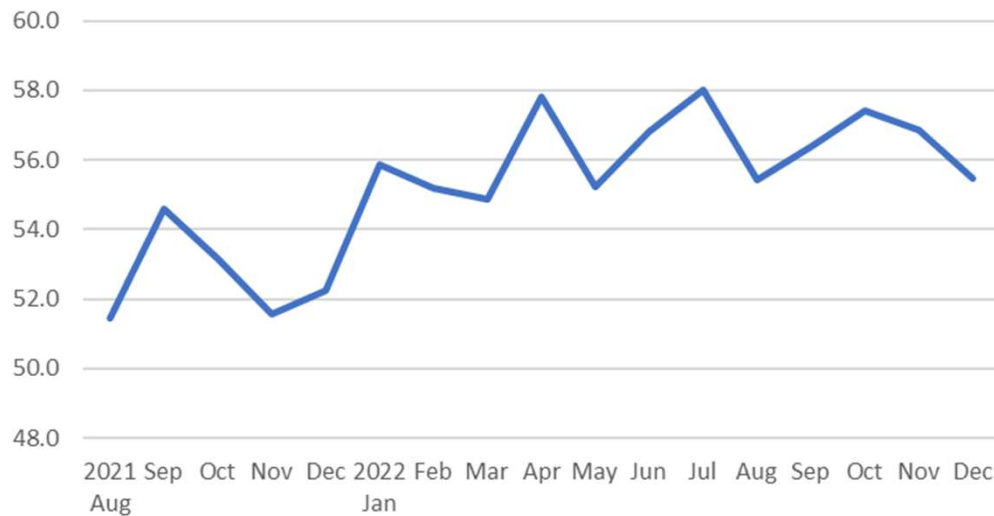


petroleum-based material, fuel :
Synthetic rubber, SIS, Tackifier resin, Plastics, fuel energy

Weak Yen 100
2021.1.8:103.93 ¥/\$
2021.9.17:109.97
2022.1.7:115.55
2022.4.29:129.83
2022.10.17:147.64
2023.1.6:132.06
2023.6.23:143.68 10.29:149.80

Tape sales price increase

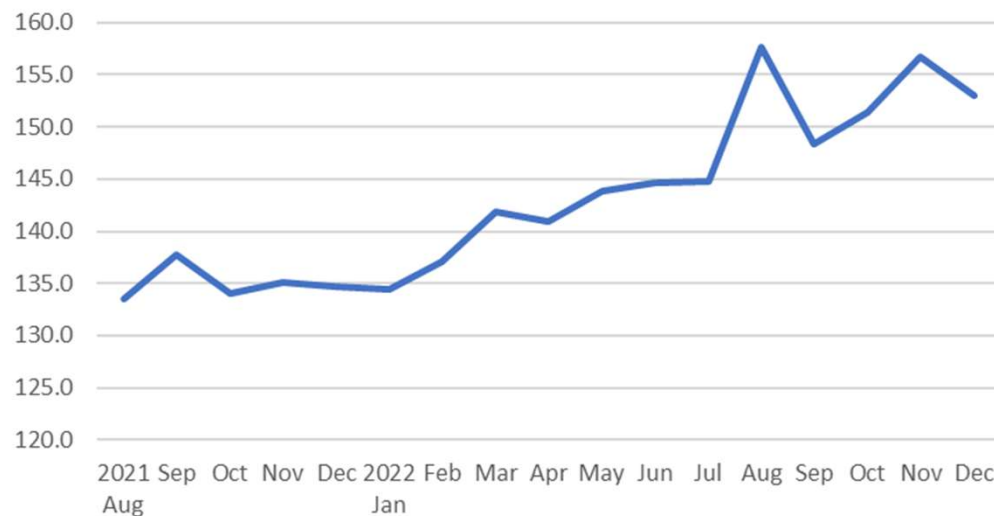
Paper backing tape sales price average



Pape backing tape is combination Kraft tape and Washi tape, the average price is shown by ¥/sqm

2021 52¥/sqm 2022 57¥/sqm

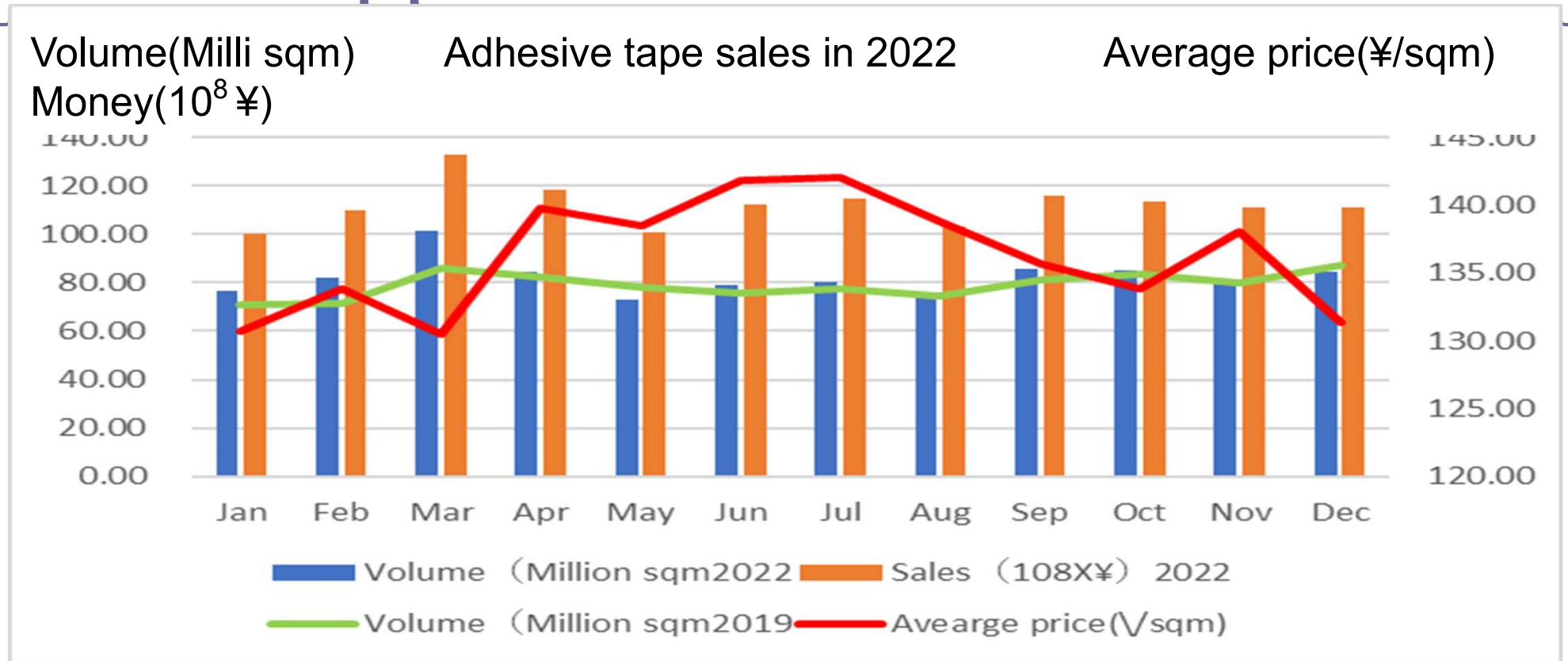
Cloth tape price average



Cloth tape is combination Rayon cloth tape and plastic cloth tape, the average price is shown by ¥/sqm

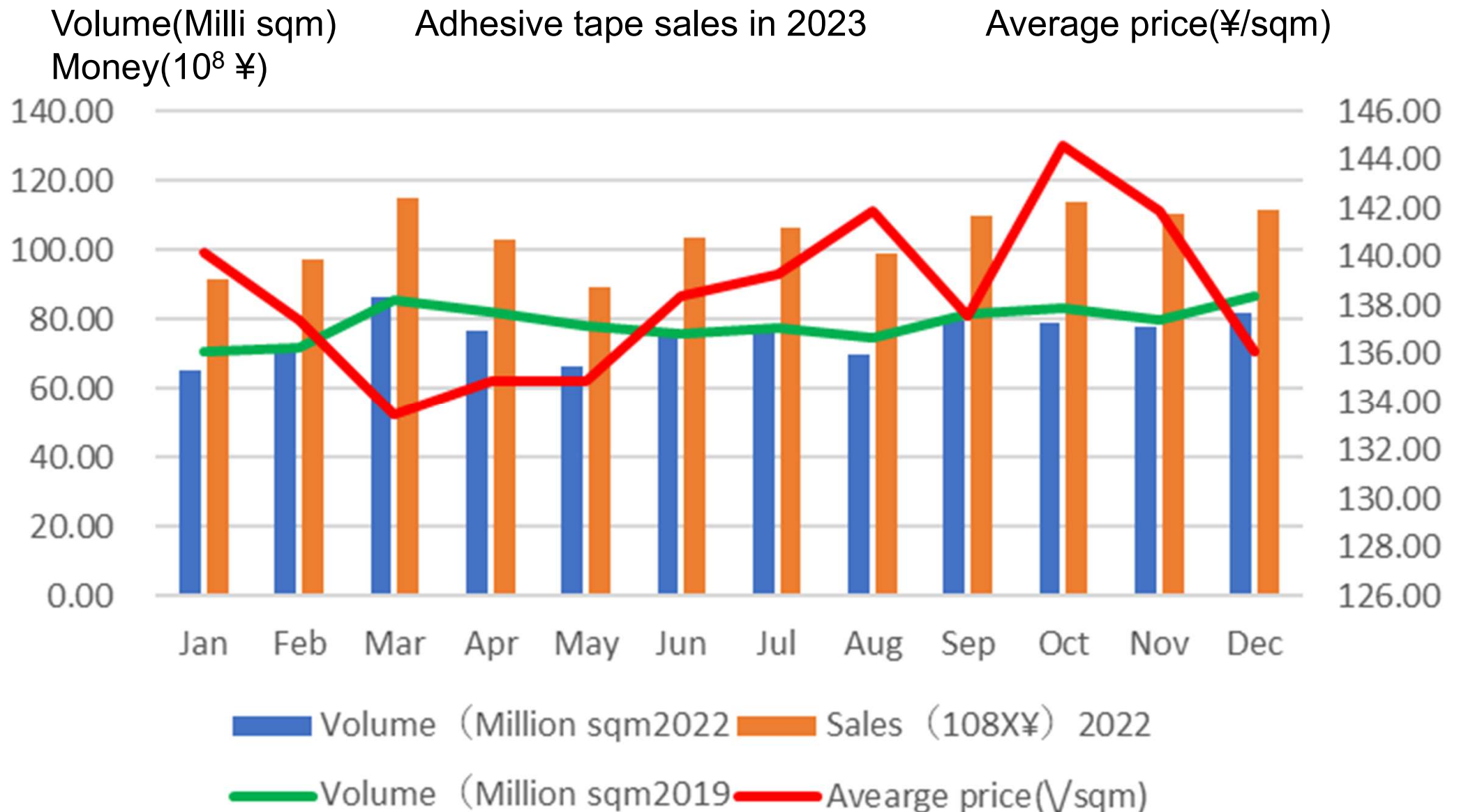
2021 133¥/sqm 2022 153¥/sqm

What happened in 2022 to effect our b



- Jan 2022, Weaker JPY, 125¥/ \$ >>> 149¥/\$
- 2Q 2022. Further Material price rising energy cost, logistics cost elevation
- Sep 2022 Tape maker released price improvement again

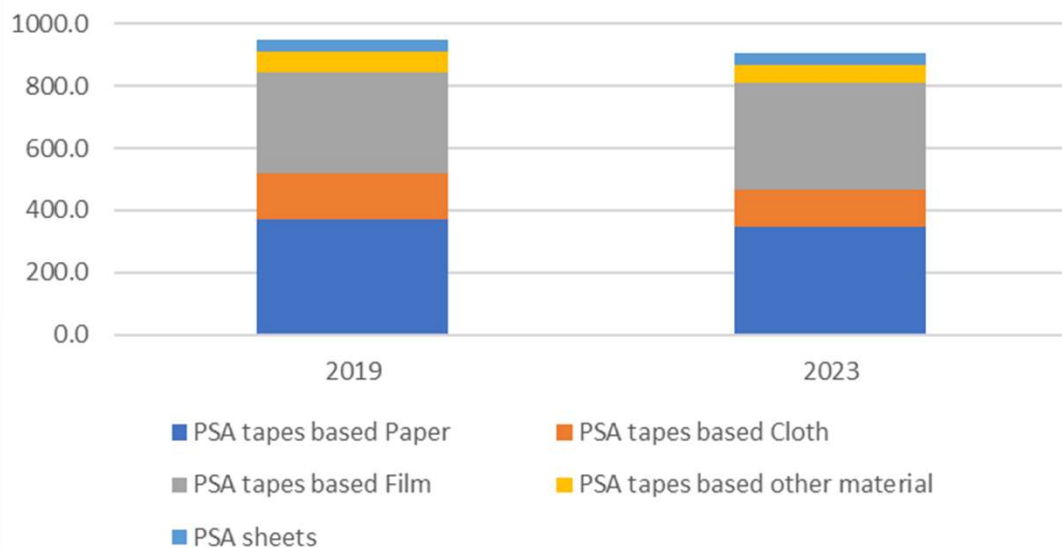
What happened in 2023 to effect our business



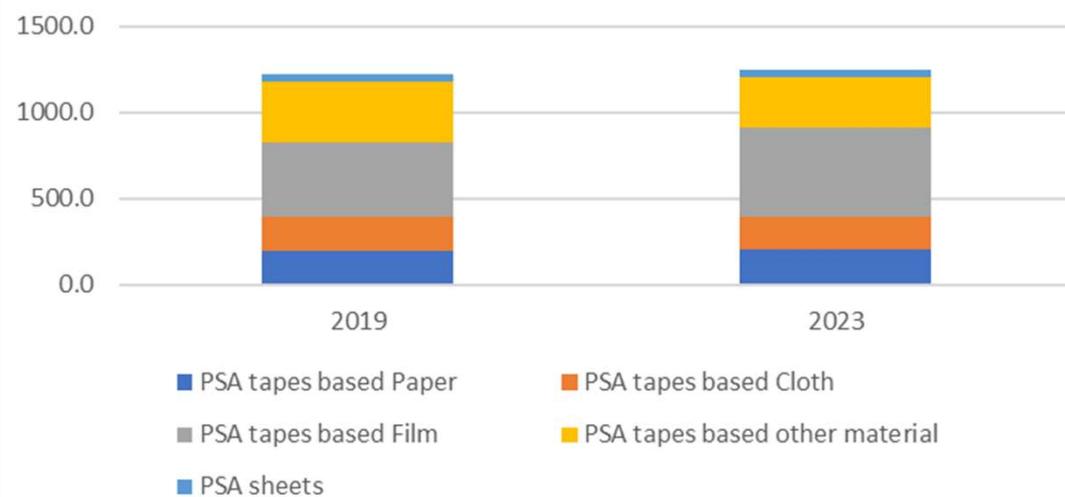
What has been changed from 2019 to 2023

Volume (Million m ²	2019	2023	Volume change	Sales change
PSA tapes based Paper	371.6	347.0	93.4%	101.6%
PSA tapes based Cloth	146.0	117.4	80.4%	96.4%
PSA tapes based Film	327.7	347.5	106.1%	119.5%
PSA tapes based other material	67.0	55.3	82.5%	83.7%
PSA sheets	35.3	36.6	103.8%	107.9%
SUM	947.6	903.8	95.4%	102.1%
			Average sales price	
Sales(10 ⁸ x ¥)	2019	2023	2019	2023
PSA tapes based Paper	199.7	202.9	53.75	58.48
PSA tapes based Cloth	194.5	187.5	133.18	159.67
PSA tapes based Film	432.4	516.6	131.95	148.63
PSA tapes based other material	355.5	297.6	530.25	538.38
PSA sheets	42.3	45.7	120.05	124.77
SUM	1224.4	1250.2	129.21	138.33

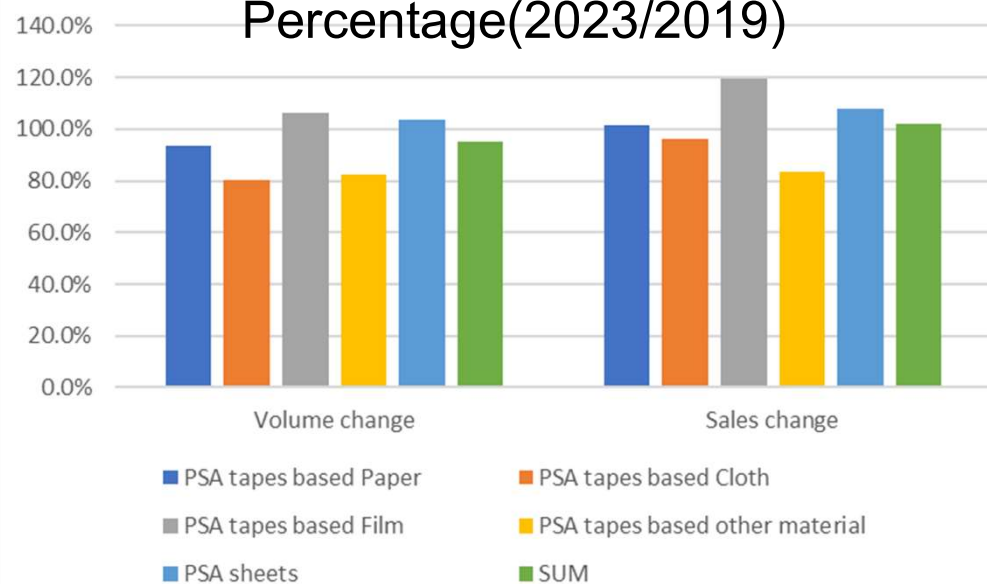
Tape Volum -2019-2023



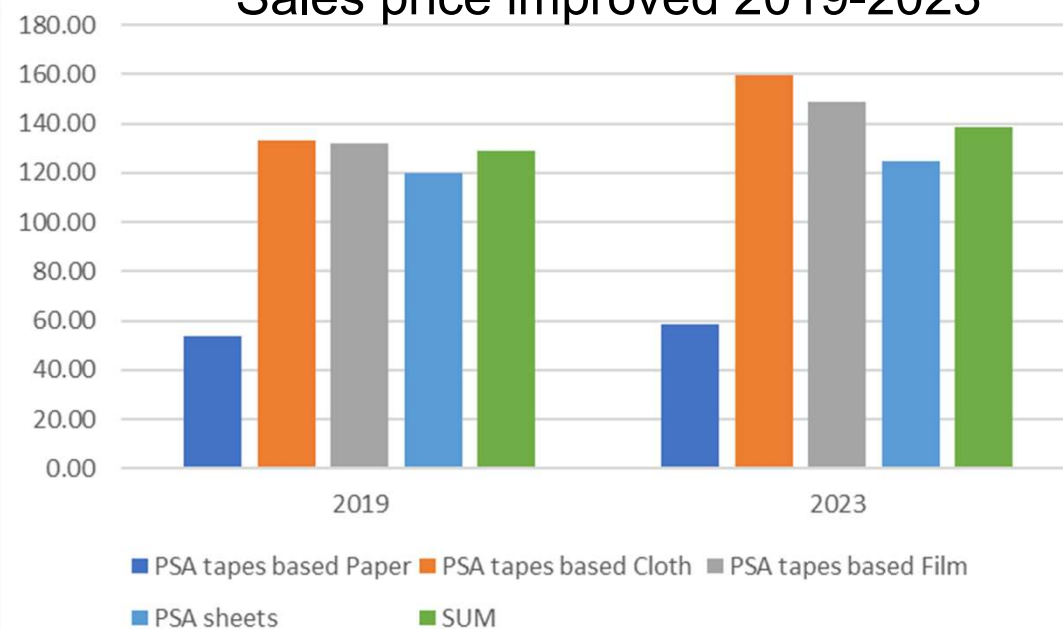
Sales(10⁸ x ¥) 2019-2023



Percentage(2023/2019)

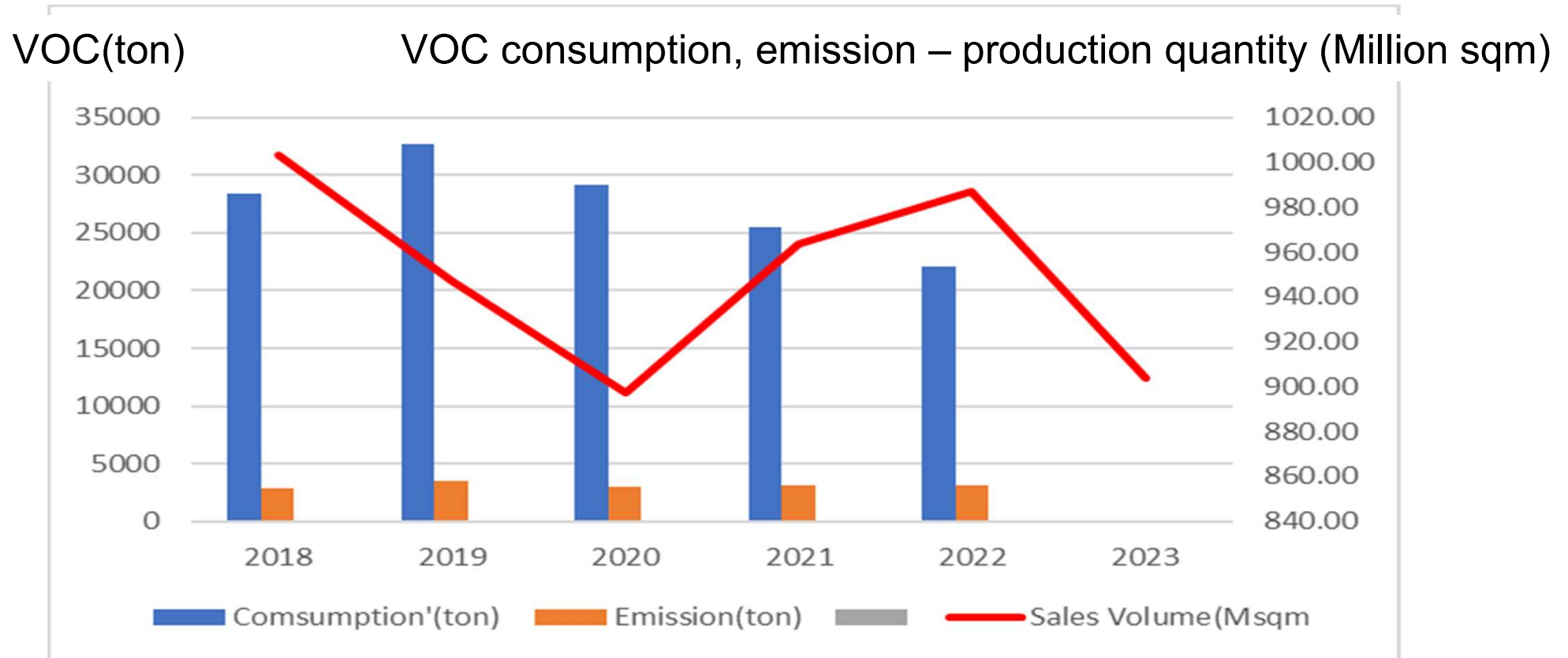


Sales price improved 2019-2023



Sustainability Mission

- Jatma report VOC used and emission amount by Adhesive tape production of member companies to the Japanese government,



VOC reduction, challenge to free VOC

- ❑ Solvent type adhesive was changed to non-solvent type
 - 1. Kraft tape for packaging; Hot melt
 - 2. Washi masking: water based adhesive
 - 3. Special W side : UV acrylic adhesive
 - 4. Cloth tape : Rubber based adhesive is casted by calendar

Summary

- ❑ Japanese PSA tape market volume is shrinking slowly.
- ❑ Covid issue impacted to not only the volume of adhesive tape market, but also hiking price.
- ❑ Tape manufacturer advanced high value-added production. make more important to sustainable management,