

# **Japan Adhesives Market Assessment, By Type [Synthetic (Acrylic, Polyvinyl Acetate (PVA), Polyurethane (PU), Ethylene-vinyl Acetate (EVA), Epoxy, Styrenic Block, Others), Natural (Animal Glue, Casein Glue, Natural Gums, Starch & Dextrin, Others)], By Technology [Water-Based, Solvent-Based, Hot melt, Reactive, Silicone, UV cured, Others], By Form [Paste, Liquid, Film, Others], By Application [Paper and Packaging, Footwear and Leather, Building and Construction, Automotive and Transportation, Electronics, Healthcare, Woodworking and Joinery, Others], By Region, Opportunities and Forecast, FY2017-FY2031**

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## **Abstracts**

Japan Adhesives Market size was valued at USD 1.68 billion in FY2023 which is expected to reach USD 2.52 billion by FY2031 growing at a CAGR of 5.18% for the forecast period between FY2024 and FY2031. The Japan adhesives market is fuelled by several important factors that support its expansion and development.

The adhesives market in Japan is experiencing positive effects from government initiatives aimed at promoting manufacturing and economic development. Adhesive manufacturers are thriving in an environment that supports domestic production, infrastructure enhancements, and industry-specific incentives. As per Japan Adhesive Industry Association (JAIA), a total of 0.73 million tonnes of adhesives were produced in

Japan in 2022 . According to the Ministry of Land, Infrastructure, Transport, and Tourism's statistical survey in 2021, there was a 6.6% rise in new housing starts in Japan, reaching 865,909 units compared to 2020. Additionally, technological advancements are playing a crucial role in driving this market growth as they continuously improve adhesive formulations, curing processes, and bonding techniques. These advancements enhance the effectiveness, durability, and performance of adhesives, resulting in broader market expansion opportunities.

Furthermore, to satisfy regulatory requirements and consumer preferences for environmentally friendly products, adhesive manufacturers are concentrating on developing eco-friendly and low-VOC adhesives. Additionally, market competition and corporate strategic alliances promote innovation, technological development, and market expansion. Collaboration, mergers, and acquisitions foster the creation of new adhesive products, broaden product portfolios, and take advantage of synergies, all of which help the Japan adhesive market grow and become more competitive.

### Strong Automotive Sector

The Japan adhesive market is significantly influenced by the automotive industry. Adhesives are essential to the production of automobiles because they offer vibration-dampening, lightweight bonding solutions, and enhanced vehicle performance. The demand for adhesives in the automotive industry is constantly increasing as Japan is a significant centre for automotive innovation and production. With 78 manufacturers in 22 provinces and more than 5.5 million workers, the Japan auto industry is the third largest in the world.

The automotive industry consumed 2,435 tonnes of adhesive in 2021 , an 11% increase from the previous year in Japan. Such a rise in adhesive usage is anticipated to boost the market demand for adhesives in Japan's automotive industry, which will fuel market expansion of adhesives over the course of the forecast period in Japan.

### Boom in Construction Sector

In Japan, the construction and building sector is a major driver of the adhesive market. In the construction industry, adhesives are widely used for sealing, flooring, and tile fixing. The industry's need for adhesives is influenced by ongoing infrastructure development projects, urbanization, and renovation activities.

Furthermore, ongoing and commencement of new construction projects is expected to

augment the demand for adhesives in large scale. For Instance, Tokyo is building a mixed-use tower with a floor area of 94,709m<sup>2</sup>, a height of 110m, and 30 stories above and below ground. Beginning in Q1 2022, construction is scheduled to be completed in Q1 2027. Along with numerous public works projects, the Japan government has promised to strengthen the domestic economy. Its preparations for important events like the 2020 Summer Olympics and the 2025 World Expo in Osaka served as the impetus for this commitment. Over the course of the forecast period, it is anticipated that Japan's construction industries to expand, increasing demand for adhesives. In 2022, more than 1.3 million tonnes of adhesives were used in the construction industry in Japan.

### Rising Demand from Healthcare Sector

Japan's aging population has resulted in rising healthcare requirements. For uses like wound care, medical device assembly, and surgical procedures, adhesives are essential in the medical and healthcare industry. The demand for biocompatible, safe, and medical-grade adhesives that abide by stringent healthcare regulations is what fuels the expansion of the adhesive market in the medical industry.

According to government data released during April 2022, Japan's population over 75 accounts for more than 15% for the first time, having increased by 720,000 to 19.37 million people. Additionally, the number of people over 65 also reached a record high this year, reaching 36.27 million, or 29.1% of the population, according to data from the Ministry of Internal Affairs and Communications. This surge in the elderly population is likely to raise the requirement of healthcare along with the need for adhesives with it.

### Stringy Regulations and Sustainability

Particularly in sectors like the automotive, electronics, and medical device industries, Japan has strict regulatory standards and safety requirements. These laws must be followed by adhesive producers in order to guarantee that their goods meet strict safety and environmental standards. Customers' trust and confidence is increased by the adherence to quality standards and compliance with laws, which increases the demand for adhesives from sectors with stringent safety and quality standards.

The Japan market places a high value on sustainability and environmental awareness. Sustainable adhesive solutions that reduce waste, offer recyclability, and minimize environmental impact are in greater demand. To meet these market demands, adhesive producers in Japan are actively creating recyclable goods, bio-based adhesives, and environmentally friendly formulations.

## Rejuvenating Japan Electronics

Another significant contributor to the growth of the Japan adhesive market is the electronics and electrical sector. Electronic devices, circuit boards, displays, and semiconductor packaging all make extensive use of adhesives. Several Countries have been significantly impacted in recent years by the global semiconductor supply shortage, highlighting the significance of the semiconductor industry. So, the Japan government is now working to revive the Japan semiconductor industry in response to this social environment.

Therefore, Japan government has spent 70 billion yen in order to promote domestic production of Semiconductors. Additionally, to revive Japan's chip industry a Japan company is collaborating with a Belgian research organization to order to develop production of next generation of chips. These new improvements in the Japan Electronics industry will drive the demand for adhesives in the country.

## Impact of COVID-19

Global supply chains were affected by the pandemic, which also affected the supply of the raw materials and parts needed to make adhesives. Japan's adhesive producers faced difficulties as a result of logistics and trade restrictions. Different downstream industries saw variations in the demand for adhesives during the pandemic. While lockdowns and restrictions temporarily slowed down sectors like the automotive and construction industries, demand increased in the packaging industry, particularly for e-commerce, and in the healthcare industry. For instance, packaging adhesives for e-commerce logistics as well as medical-grade adhesives for healthcare uses like medical device assembly and wound care witnessed increased demand.

## Impact of Russia-Ukraine War

Global market uncertainties, including those affecting the adhesives sector, are brought on by geopolitical tensions and conflicts. International political unpredictability influences business confidence and trade relations, which may have an impact on the market dynamics for Japan adhesive manufacturers, especially as Japan is increasingly seeking international collaborations. Japan also placed a ban on importing crude oil from Russia leading to a rise in production of several chemicals. As a result of the suspension of crude imports, Japan's imports of Russian crude fell by 60.2% in 2022. Lately, to minimize any potential disruptions brought on by changes in trade dynamics,

Japan adhesive manufacturers are re-evaluating their export strategies and exploring alternative markets or trade routes.

### Key Players Landscape and Outlook

Companies operating in the Japan Adhesives market are seeking active collaboration or acquisition of businesses to facilitate use of well-established resources and distribution infrastructure. Collaborating with local adhesive manufacturers or distributors in Japan provides foreign companies with valuable access to established distribution networks. This allows them to reach customers more efficiently and effectively, leveraging the local partner's knowledge of the market, relationships with retailers, and understanding of consumer preferences. Furthermore, acquisition allow for the creation of specialized adhesive solutions that satisfy particular industry needs, improving product performance and opening up new market opportunities.

For instance, in 2022, Sika AG acquired Hamatite from Yokohama Rubber Co. Ltd. in order to strengthen its market share in Japan. The product portfolio includes various technologies such as polyurethane, hotmelts and modified silicone.

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\*Companies mentioned above DO NOT hold any order as per market share and can be changed as per information available during research work

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