

## **Japan Paper Packaging Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)**

Market Report | 2023-01-23 | 100 pages | Mordor Intelligence

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### **Report description:**

The Japanese paper packaging market is estimated to record a CAGR of about 6.0% over the forecast period.

#### Key Highlights

Japan is the world's second-largest producer of plastic waste per capita, just behind the United States. The tight international regulations in Japan are expected to encourage the manufacturers to capitalize on the rising demand for environmentally sustainable packaging materials, such as paper packaging, which can be deployed across various industries.

Seemingly, major plastic bag suppliers in the region, such as Fukusuke Kogyo, are experiencing a decline in the demand for plastic bags at grocery stores, as customers are legally required to pay explicitly for the bags, and the company expects to witness a one-third decrease in the order soon. Also, the company announced that it was investing in materials development to lower the environmental impacts and production costs.

Furthermore, the major paper manufacturing companies in the region, such as Nippon Paper, are aiming to capitalize on the decreasing demand for plastic and announced the expansion of paper-based barrier materials that protect the products from air and water. As per Nippon Paper, over the years, the demand for paper and paperboard packaging materials has risen as a replacement for more cost-effective plastics. Currently, paper-based packaging materials account for 70% of its total sales. The recent outbreak of COVID-19 and the announcement of lockdown have led to a surge in demand for essentials with sanitized packaging. Also, a recent study by the New England Journal of Medicine suggests the virus could only survive up to 24 hours on paper-based cardboard packaging compared to 72 hours on plastic-based packaging, further driving the market growth.

#### Japan Paper Packaging Market Trends

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## The Processed Food and Beverage Industry to Drive the Demand in the Market

Japan is considered one of the significant consumers of paper-based products across various industries, including newsprint, packaging, printing and communication, sanitary, and other miscellaneous applications. There has been a recent trend of adopting paper in the packaging industry, owing to consumers' awareness about sustainable packaging, concerns associated with deforestation, and raw material availability, among others.

For instance, the food manufacturers in the region have started to realize the drawbacks associated with plastic wrapping and are preparing to switch to paper packaging.

Also, in line with the announcement of Nestle Japan's plan to use 100% recyclable packaging by 2025, Nestle Japan released new packaging for its famous miniature KitKat Chocolate bars featuring origami paper instead of plastic materials. Also, the new paper packaging is set to receive the Forest Stewardship Council certification and is fully recyclable.

Furthermore, to counter the environmental concerns and to drive sustainability, the company expects to drop around 380 metric tons of plastic each year, as it plans to release further paper bags for its other products, such as normal-sized KitKat, multipacks, and single-layer paper wrappers for individual KitKat by 2021.

Also, NGOs are running campaigns, such as PlasticMonsters, with around 1,834,646 people filing the petition to stop the production of single-use plastics, targeting brands, such as Nestle and Unilever, responsible for not recycling 90% of plastic. This factor is forcing companies to switch to environmentally friendly packaging. Nestle, Japan, is currently exploring the scope of new packaging for other brands and products. It is also actively exploring materials to reduce the burden on the environment further, as it sells around 4 million products daily.

As per the Ministry of Economy, Trade, and Industry, Japan, in 2021, the consumption volume of corrugated cardboard boxes for processed foods and beverages in Japan amounted to around 4.1 billion square meters. The consumption volume of corrugated boxes increased slightly compared to about 3.9 billion square meters in 2017.

## Corrugated Box Segment to Hold a Major Market Share

The corrugated box segment is expected to hold a significant market share, owing to the biodegradable and non-toxic properties of corrugated boxes, added with their lightweight and durability, which make them one of the most preferred choices for packaging.

Japan is known to have one of the fastest-growing e-commerce markets in the world, with stable growth over the years and the presence of global giants, such as Rakuten and Amazon. The country also has a presence of supermarket e-commerce sites, such as Ito-Yokado and Markets, which drive the adoption of corrugated boxes for products, such as beverages and processed foods. Further, in Japan, the collection rate of corrugated boxes is reported to be as high as 95%, added with the recycling rate of 90% at the corrugated cardboard factories, which drives the manufacturers to clear costs and improve the processing capacity. Also, the added flexibility of corrugated boxes that can be used as exterior materials and processed into the interiors of complex structures drives their demand in the region.

Additionally, amid COVID-19, the manufacturers of corrugated boxes worldwide are working to keep the transport packaging flow to the makers of essential products, including food, medical, and other pharmaceutical products, further driving the growth of the market.

However, due to the market saturation for materials, such as corrugated packaging, and numerous manufacturers of corrugated boxes in Japan, local vendors are looking out for global expansions. For instance, Nippon Paper, one of Japan's biggest pulp and paper companies, purchased the Australian and New Zealand cardboard box manufacturing division of Orora. It also bought a few paper cups and food packaging businesses in Vietnam and India as a part of its growth strategy.

According to the Ministry of Economy, Trade, and Industry of Japan, in 2021, the production value of corrugated boxes in Japan amounted to around 686.8 billion Japanese yen. The production value increased compared to about 620.1 billion yen in 2016.

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## Japan Paper Packaging Market Competitor Analysis

The market is moderately fragmented, with the presence of players, like DS Smith, Graphic Packaging, International Paper Company, Rengo, Sappi, and LimitedTetra Laval, that play vital roles in upscaling the rise in the demand, leveraging the declining demand for plastic packaging and customers' preference for paper-based packaging. To capture the market share, vendors are strategizing their business models by enhancing their product lines and engaging in collaborations and acquisitions, with a core focus on sustainability.

November 2021: Nippon Paper Industries Co., Ltd. and Yousual Co., Ltd. are replaceable paper containers agreed to cooperate in expanding the business of "SPOPS," and SPOPS has been adopted in 6 of Yoursual daily necessities. At the same time, the two companies decided to carry out joint marketing of SPOPS for consumers and promote the consideration of strategy construction. Yousual aims to expand the SPOPS business by providing marketing knowledge, and Nippon Paper Industries provides technical knowledge and support.

September 2021: Rengo Co., Ltd. announces that Vina Kraft Paper Co., Ltd., its joint venture in Vietnam, has decided to construct a new production base for containerboard. With the newly constructed mill, Vina Kraft Paper will firmly establish its position as a market leader in the Vietnam containerboard market and aims for sustainable development and growth. Furthermore, it will also strengthen Vietnam's domestic integrated production system of containerboard to corrugated boxes.

Additional Benefits:

The market estimate (ME) sheet in Excel format  
3 months of analyst support

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