

Japan Biaxially Oriented Polyethylene Terephthalate Film Market Assessment, By Film Type [Thin Film, Thick Film], By Film Thickness [Below 20 Micron, 20 Micron-50 Micron, 50 Micron-75 Micron, Above 75 Micron], By End-user Industry [Packaging, Industrial, Electrical and Electronics, Imaging, Others], By Region, Opportunities and Forecast, FY2019-FY2033F

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Report description:

Japan biaxially oriented polyethylene terephthalate film market is projected to witness a CAGR of 4.56% during the forecast period FY2026-FY2033F, growing from USD 1.24 billion in FY2024 to USD 1.77 billion in FY2033. The BOPET market in the country is driven by its extensive increasing uses in the packaging, electronics, and industrial sectors. Furthermore, the growing demand for lightweight, high-strength, and eco-friendly packaging materials, particularly in the pharmaceutical and food sectors, due to their better barrier properties and the ability to enhance the shelf life of products. Moreover, innovations in recyclable and eco-friendly BOPET films follow the growing trend of environmental policies and consumer demand. The e-commerce boom has raised demand for secure packaging materials, and innovations in high-performance films continue to meet diversified industrial demands.

According to the International Trade Administration, the e-commerce market in Japan, valued at approximately USD 210 billion in 2022, is driving the demand for BOPET films due to their durability, transparency, and excellent barrier properties. These films ensure product safety during transit and support sustainable packaging solutions.

Industrial Sector Drives Demand for BOPET Films in Japan

The industrial sector in Japan plays a pivotal role in driving the demand for BOPET films, thanks to their exceptional mechanical, thermal, and chemical properties. BOPET films have wide applications in industrial applications such as electrical insulation, photovoltaic backsheets, and release liners. Their tension resistance, dimensional stability, and endurance at extreme temperatures make them an essential component in manufacturing processes that demand high-strength and uniform material. For instance, BOPET films are applied in flexible printed circuits and capacitor insulation in the electronics industry due to their

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excellent dielectric properties. Besides this, growth in renewable energy projects in Japan has increased the demand for BOPET films in photovoltaic applications. These are the cover films used on solar panels, giving them strength and weather resistance. Other than this, requirements of green production processes have encouraged the utilization of recyclable BOPET films. With technological advancements and high diversification in industries, the Japanese industry will show a phenomenal increase in demand for BOPET films.

In October 2022, Toray Industries, Inc. announced its plans to increase production capacity by 60% for Lumirror biaxially oriented polyester release films for manufacturing multilayer ceramic capacitors (MLCCs). The company announced an investment of approximately USD 55 million in the upgrade at the Gifu Plant, which is set to go operational in 2025. MLCCs are used in various electrical devices, including telecommunications equipment, appliances, and automobiles. The domestic upgrade is expected to help Toray capitalize on the market's growth, as Japan is the largest consumer of release films.

Expanding Packaging Industry Drives BOPET Film Demand in Japan

The packaging industry in Japan is one of the prominent factors driving BOPET film market, fueled by the increasing demand for high-performance packaging solutions across food, beverage, and pharmaceutical sectors. BOPET films are highly valued for their exceptional barrier properties against moisture, oxygen, and other contaminants, ensuring product freshness and safety. With shifting consumer preferences towards ready-to-consume food and convenience foods, there has been a tremendous rise in demand for durable and flexible packaging materials. Additionally, the rise in e-commerce has seen a higher demand for safe and lightweight packing solutions, where BOPET films are at the forefront owing to their toughness and versatility. Their ability to print at high quality also makes them ideal for product branding and differentiation. Furthermore, sustainability issues have driven innovations in recyclable and biodegradable BOPET films, an aspect that has seen Japan stick to its stringent environmental regulations. With all these aspects put together, the development of the packaging industry continues to be a cornerstone of the development of the BOPET film market in Japan.

For instance, Japanese production of plastic packaging fell by 0.1 million tons (-9.01%) in FY2023 compared to the same period last year, according to METI Japan. Predictably, it is set to increase back to 1.09 million tons in FY2024, signaling potential market growth.

Technological Advancements Enhance Performance and Sustainability of BOPET Films

Technological innovations remain a key driver for the growth of the BOPET film market in Japan. Manufacturers are continually improving the performance characteristics of these films to meet evolving industrial requirements. Advanced co-extrusion technologies have enhanced thermal stability, tensile strength, and surface functionalization of BOPET films, making them suitable for demanding applications in electronics, solar panels, and industrial products. Furthermore, innovations in coating technologies have expanded their utility in specialized fields such as photovoltaic films and electronic displays. Sustainability is another area where technology plays a pivotal role; advancements in recycling processes and bio-based materials have led to the development of eco-friendly BOPET films. These sustainable variants cater to growing consumer demand for environmentally conscious products while complying with Japan's strict environmental regulations. By continually pushing the boundaries of innovation, technological advancements are not only enhancing product performance but also opening new avenues for market growth. In January 2025, a Japanese plastics manufacturer, Sekisui Chemical, collaborated with Japan's Bank of Mitsubishi UFJ (MUFG Bank) to conduct two demonstrations of its 100 MW perovskite solar production plant. The project aims to raise awareness of practical applications of perovskite solar photovoltaic technology and verify its durability, weather resistance, and performance. Japan's increasing investment in renewable energy projects, particularly perovskite solar PV plants, is expected to boost demand for high-performance BOPET films in industrial applications.

Growing E-Commerce Sector Boosts Demand for Durable Packaging Materials

The rapid expansion of Japan's e-commerce sector is significantly driving demand for BOPET films as an essential component of secure and efficient packaging solutions. With urbanization and the changing lifestyles of consumers driving e-commerce volumes, the need for strong materials that can withstand multiple handling stages along the transit has become a necessity. BOPET films possess good tensile strength, moisture resistance, and lightness, which are well-suited to their application in packaging goods through complex supply chains. In addition, they can also be readily utilized in any one of the widespread packaging types, such as pouches and laminated film. Their superior printing qualities make them extremely valuable for brand objectives in an increasingly competitive online marketplace environment. Lastly, recyclability is ideally matched with

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sustainability aims that are prioritized by increasingly more e-commerce companies wanting to green their operations. As e-commerce grows at a pace that is beyond belief in Japan, the use of BOPET films will increase and strengthen their position even more within existing logistics and packaging networks.

Japan is the fourth largest e-commerce market in the world after China, the United States, and the United Kingdom.

Business-to-consumer (B2C) e-commerce sales of items increased by 8.6% year over year in 2021, according to Japan's Ministry of Economy, Trade and Industry's (METI) annual eCommerce Industry Survey, which was released in August 2022. The B2C eCommerce industry as a whole was valued at USD 188.1 billion.

Future Market Scenario (FY2026-FY2033F)

-□ The fast development of e-commerce in Japan will propel demand for light and resilient packaging materials such as BOPET films. Their capacity to safeguard products while in transit and accommodate high-quality printing for brand purposes will continue to be essential in the e-commerce supply chain.

-□ Japan's high green regulations and consumer preferences for eco-friendly goods will propel demand for biodegradable and recyclable BOPET films. Development in bio-based materials and recycling technology will be instrumental in achieving these sustainability goals.

-□ Technological advancements in the BOPET films will improve its performance in industrial applications in fields such as electronics, solar cells, and automotive. Improved thermal stability and surface functionalization will also increase its application in high-demanding applications.

-□ Food and pharma high-barrier packaging solutions will continue to be a major driver for BOPET film demand. Their preservation of shelf life and product integrity will be of paramount importance in such applications.

Key Players Landscape and Outlook

The BOPET film market in Japan is characterized by intense competition among key players who focus on innovation, sustainability, and strategic expansion to maintain their market positions. These companies are leveraging advanced technologies to enhance product performance, such as improved thermal stability, tensile strength, and barrier properties, catering to diverse applications in packaging, electronics, and industrial sectors. Sustainability has emerged as an important strategy area, with businesses investing in recyclable and biodegradable BOPET films to cope with strict environmental legislation and growing customer demand for sustainable products. Strategic activities such as product launches, mergers and acquisitions, collaborations, and expansion are being made to achieve market presence and growth in new markets such as renewable energy and electric vehicles. The prominent players are investing in enhancing production capacity and product line diversification to address the increasing demand for high-performance films across various industries. A focus on technological innovation and sustainability allows such participants to further propel future growth in the BOPET film market in Japan.

In December 2022, Toray Industries, Inc. announced the development of a polyethylene terephthalate film that can eliminate solvent-derived carbon dioxide emissions, which started production domestically in March 2024. These films are designed to promote eco-friendly film products such as release, adhesive, printing, packaging, and automotive films, as the environmental impact of organic solvents in PET film processing is a major concern.

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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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