



TABLE OF CONTENTS

1 EXECUTIVE SUMMARY..... 15

- 1.1 Applications..... .. 15
- 1.2 Market segmentation by type of nanocellulose..... 19
 - 1.2.1 CNF..... 20
 - 1.2.2 MFC..... 21
 - 1.2.3 Cellulose nanocrystals(CNC)..... 21
- 1.3 Market trends in Japan..... 22
- 1.4 Japan cellulose nanofibers market size..... 23
 - 1.4.1 The market for cellulose nanofibers in 2017 in Japan..... 23
 - 1.4.2 The market for cellulose nanofibers in Japan 2018..... 25
 - 1.4.3 Target markets for producers in Japan..... 26
 - 1.4.4 CNF/MFC demand in tons, 2015–2030..... 29

2 RESEARCH SCOPE AND METHODOLOGY..... 31

- 2.1 Report scope..... 31
- 2.2 Research methodology..... 31

3 MARKET STRUCTURE FOR CELLULOSE NANOFIBERS IN JAPAN 32

4 REGULATIONS AND STANDARDS IN JAPAN..... 33

5 GOVERNMENT FUNDING IN JAPAN..... 33

6 CELLULOSE NANOFIBER PRICES..... 34

7 MARKETS FOR CELLULOSE NANOFIBERS (CNF) IN JAPAN..... 36

- 7.1 COMPOSITES MARKET SUMMARY..... 36
 - 7.1.1 Trends in the composites market and CNF solution..... 36
 - 7.1.2 Comparison of CNF to other composite materials..... 37
 - 7.1.3 Applications..... 38
 - 7.1.3.1 By cellulose type..... 38
 - 7.1.3.2 Applications roadmap..... 39
- 7.2 PACKAGING..... .. 39



The Market for Cellulose Nanofibers in Japan

○ 7.2.1	Market trends and CNF solution.....	39
○ 7.2.2	Applications.....	43
▪ 7.2.2.1	Anti-bacterial.....	44
▪ 7.2.2.2	Gas barrier.....	44
○ 7.2.3	Product developer profiles.....	45
● 7.3	AUTOMOTIVE.....	45
○ 7.3.1	Market trends and CNF solution.....	45
○ 7.3.2	Applications.....	48
▪ 7.3.2.1	Composites.....	48
○ 7.3.3	Product developer profiles.....	49
● 7.4	CONSTRUCTION.....	51
○ 7.4.1	Market drivers and trends.....	51
○ 7.4.2	Applications.....	52
○ 7.4.3	Product developer profiles.....	53
● 7.5	PAPER AND BOARD.....	54
○ 7.5.1	Market drivers and trends.....	54
○ 7.5.2	Applications.....	54
○ 7.5.3	Properties.....	54
▪ 7.5.3.1	Reinforcing agents.....	55
▪ 7.5.3.2	Transparency and flexibility.....	55
▪ 7.5.3.3	Paper packaging.....	55
▪ 7.5.3.4	Paper coatings.....	56
▪ 7.5.3.5	Anti-microbials.....	56
○ 7.5.4	Product developer profiles.....	56
● 7.6	TEXTILES.....	57
○ 7.6.1	Market drivers and trends.....	57
○ 7.6.2	Applications.....	58
○ 7.6.3	Product developer profiles.....	59



The Market for Cellulose Nanofibers in Japan

- 7.7 FILTRATION.....
.. 60
 - 7.7.1 Market drivers and trends..... 60
 - 7.7.2 Applications..... 61
 - 7.7.2.1 Nanomaterials in filtration..... 61
 - 7.7.2.2 CNF membranes and filters..... 62
 - 7.7.2.3 Water filtration..... 63
 - 7.7.2.4 Air filtration..... 63
 - 7.7.2.5 Virus filtration..... 64
 - 7.7.3 Product developer profiles..... 64
- 7.8 RHEOLOGY MODIFIERS..... 65
 - 7.8.1 Applications..... 65
 - 7.8.2 Food..... 66
 - 7.8.3 Pharmaceuticals..... 66
 - 7.8.4 Cosmetics..... 66
 - 7.8.5 Product developer profiles..... 66
- 7.9 PRINTED AND FLEXIBLE ELECTRONICS..... 67
 - 7.9.1 Market drivers and trends..... 67
 - 7.9.2 Applications..... 68
 - 7.9.2.1 Wearable electronics..... 69
 - 7.9.2.2 Nanopaper..... 71
 - 7.9.2.3 Paper memory..... 72
 - 7.9.2.4 Conductive inks..... 73
 - 7.9.3 Product developer profiles..... 73
- 7.10 3D PRINTING..... 73
 - 7.10.1 Market drivers and trends..... 73
 - 7.10.2 Applications..... 74
 - 7.10.3 Product developer profiles..... 75
- 7.11 MEDICINE & HEALTHCARE..... 75
 - 7.11.1 Market drivers and trends..... 75



The Market for Cellulose Nanofibers in Japan

- 7.11.2 Applications..... 76
 - 7.11.2.1 Drug delivery..... 77
 - 7.11.2.2 Medical implants..... 77
 - 7.11.2.3 Tissue engineering..... 78
 - 7.11.2.4 Wound dressings..... 78
 - 7.11.2.5 Lateral flow immunoassay labels..... 78
- 7.12 Product developer profiles..... 79

8 CELLULOSE NANOFIBER PRODUCER AND PRODUCT DEVELOPERS IN JAPAN..... 80-130 (43 company profiles)

9 REFERENCES..... 131

TABLES

- Table 1: Market summary for nanocellulose-Selling grade particle diameter, usage, advantages, average price/ton, market estimates, global consumption, main current applications, future applications..... 15
- Table 2: Markets and applications for nanocellulose..... 17
- Table 3: CNF producer capacities 2018..... 20
- Table 4: MFC producer capacities 2018..... 21
- Table 5: Cellulose nanocrystal producer capacities 2018..... 21
- Table 6: Market trends in cellulose nanofibers in Japan..... 22
- Table 7: Target markets for cellulose nanofiber producers and product developers in Japan..... 26
- Table 8: Product/price/application matrix of cellulose nanofiber producers in Japan versus global companies..... 34
- Table 9: Market drivers, trends and CNF solutions in composites market..... 36
- Table 10: Comparative properties of polymer composites reinforcing materials..... 37
- Table 11: Applications of nanocellulose in polymer composites by cellulose type..... 38
- Table 12: Nanocellulose applications timeline in the polymer composites market..... 39
- Table 13: Examples of antimicrobial immobilization into cellulose nanofibers..... 43
- Table 14: Oxygen permeability of nanocellulose films compared to those made from commercially available petroleum based materials and other polymers..... 45
- Table 15: Japan companies developing nanocellulose products in bio packaging, applications targeted and stage of commercialization..... 45
- Table 16: Applications of natural fiber composites in vehicles by manufacturers..... 47



The Market for Cellulose Nanofibers in Japan

- Table 17: Japan companies developing cellulose nanofibers products in the automotive industry, applications targeted and stage of commercialization..... 50
- Table 18: Market drivers, trends and CNF solutions in construction market..... 51
- Table 19: Comparison of nanocellulose with steel and other materials..... 52
- Table 20: Japan companies developing Cellulose nanofibers in construction-Companies and products..... 53
- Table 21: Market drivers, trends and CNF solutions in the paper and board market..... 54
- Table 22: Cellulose nanofibers applications timeline in the paper and board markets..... 54
- Table 23: Japan companies developing cellulose nanofibers products in paper and board, applications targeted and stage of commercialization..... 56
- Table 24: Market drivers, trends and CNF solutions in the textiles market..... 57
- Table 25: Japan companies developing cellulose nanofibers products in textiles, applications targeted and stage of commercialization..... 59
- Table 26: Market drivers, trends and CNF solutions in the filtration market..... 60
- Table 27: Nanocellulose applications timeline in the filtration market..... 61
- Table 28: Types of filtration..... 62
- Table 29: CNF membranes..... 63
- Table 30: Japan companies developing cellulose nanofiber products in filtration, applications targeted and stage of commercialization..... 64
- Table 31: Cellulose nanofibers applications timeline in the rheology modifiers market..... 65
- Table 32: Japan companies developing cellulose nanofiber rheology modifiers..... 66
- Table 33: Market drivers, trends and CNF solutions in the printed and flexible electronics market..... 67
- Table 34: Cellulose nanofiber applications timeline in flexible electronics..... 69
- Table 35: Properties of flexible electronics-cellulose nanofiber film (nanopaper)..... 69
- Table 36: Properties of flexible electronics cellulose nanofiber films..... 71
- Table 37: Japan companies developing cellulose nanofiber products in paper electronics, applications targeted and stage of commercialization..... 73
- Table 38: Market drivers, trends and CNF solutions in the 3D printing market..... 74
- Table 39: Applications of CNF in 3D printing..... 74
- Table 40: Companies developing cellulose nanofibers 3D printing products..... 75
- Table 41: Market drivers, trends and CNF solutions in the medicine and healthcare market..... 75
- Table 42: Cellulose nanofiber applications timeline in the medicine and healthcare markets..... 77



The Market for Cellulose Nanofibers in Japan

- Table 43: Cellulose nanofibers product developers in medical and healthcare applications in Japan..... 79
- Table 44: Oji Holdings CNF products..... 114

FIGURES

- Figure 1: Market segmentation by type of nanocellulose, capacities 2018..... 20
- Figure 2: Market segmentation by type of micro and nanocellulose, percentage..... 20
- Figure 3: Cellulose nanofiber transparent sheet..... 23
- Figure 4: Cellulose Nanofiber (CNF) composite with polyethylene (PE)..... 24
- Figure 5: CNF products..... 24
- Figure 6: XCNF..... 25
- Figure 7: CNF/MFC market value, by end user market demand, 2015–2030 (Tons)..... 29
- Figure 8: Schematic of typical commercialization route for cellulose nanofiber producer..... 32
- Figure 10: Example process for producing NFC packaging film..... 43
- Figure 11: Nanomaterials-based automotive components..... 48
- Figure 12: CNF car engine cover developed in Japan Ministry of the Environment's (MOE) Nano Cellulose Vehicle (NCV) Project..... 49
- Figure 13: NFC composite..... 49
- Figure 14: Nanowood with hierarchically aligned cellulose nanofibrils for insulation..... 53
- Figure 15: CNF deoderant products..... 59
- Figure 16: Electronic components using NFC as insulating materials..... 69
- Figure 17: Cellulose nanofiber films..... 70
- Figure 18: Nanocellulose photoluminescent paper..... 71
- Figure 19: LEDs shining on circuitry imprinted on a 5x5cm sheet of CNF..... 71
- Figure 20: Foldable nanopaper..... 72
- Figure 21: Foldable nanopaper antenna..... 72
- Figure 22: Paper memory (ReRAM)..... 73
- Figure 23: 3D printed CNFS in Paper Microfluidics devices..... 74
- Figure 24: Asahi Kasei CNF fabric sheet..... 81
- Figure 25: Properties of Asahi Kasei cellulose nanofiber nonwoven fabric..... 81
- Figure 26: CNF nonwoven fabric..... 82



The Market for Cellulose Nanofibers in Japan

• Figure 27: Ashai Kasei CNF production process.....	83
• Figure 28. Chuetsu Pulp & Paper CNF production process.....	85
• Figure 29. Daicel Corporation CNF production process.....	87
• Figure 30. CNF-reinforced PP compounds.....	90
• Figure 31. Kirekira! toilet wipes.....	90
• Figure 32. Daio Paper CNF production process.....	91
• Figure 33. DIC Products CNF production process.....	93
• Figure 34: Rheocrysta spray.....	95
• Figure 35. DKS Co. Ltd. CNF production process.....	95
• Figure 36: CNF gel.....	99
• Figure 37: Block nanocellulose material.....	100
• Figure 38: Engine cover utilizing Kao CNF composite resins.....	101
• Figure 39: 0.3% aqueous dispersion of sulfated esterified CNF and dried transparent film (front side).....	102
• Figure 40: Hydrophobization facilities for raw pulp.....	106
• Figure 41: Mixing facilities for CNF-reinforced plastic.....	106
• Figure 42. Nippon Paper CNF production process.....	108
• Figure 43: Nippon Paper Industries' adult diapers.....	109
• Figure 44: CNF wet powder.....	110
• Figure 45: CNF transparent film.....	110
• Figure 46: Transparent CNF sheets.....	111
• Figure 47. Oji Paper CNF production process.....	113
• Figure 48: Fluorene cellulose ® powder.....	115
• Figure 49. Seiko PMC CNF production process.....	119
• Figure 50: Rubber soles incorporating CNF.....	120
• Figure 51: Silk nanofiber (right) and cocoon of raw material.....	122
• Figure 52. BiNFi-s Dry Powder.....	122
• Figure 53. BiNFi-s Dry Powder and Propylene (PP) Complex Pellet.....	122
• Figure 54. Sugino Machine CNF production process.....	123
• Figure 55: Silver / CNF composite dispersions.....	127



The Market for Cellulose Nanofibers in Japan

- Figure 56: CNF/nanosilver powder..... 127
- Figure 57: Comparison of weight reduction effect using CNF..... 128
- Figure 58: CNF resin products..... 130