

Current Situation of Chemical Fiber Industry in Japan

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01. Overall Economic Situation of Japan

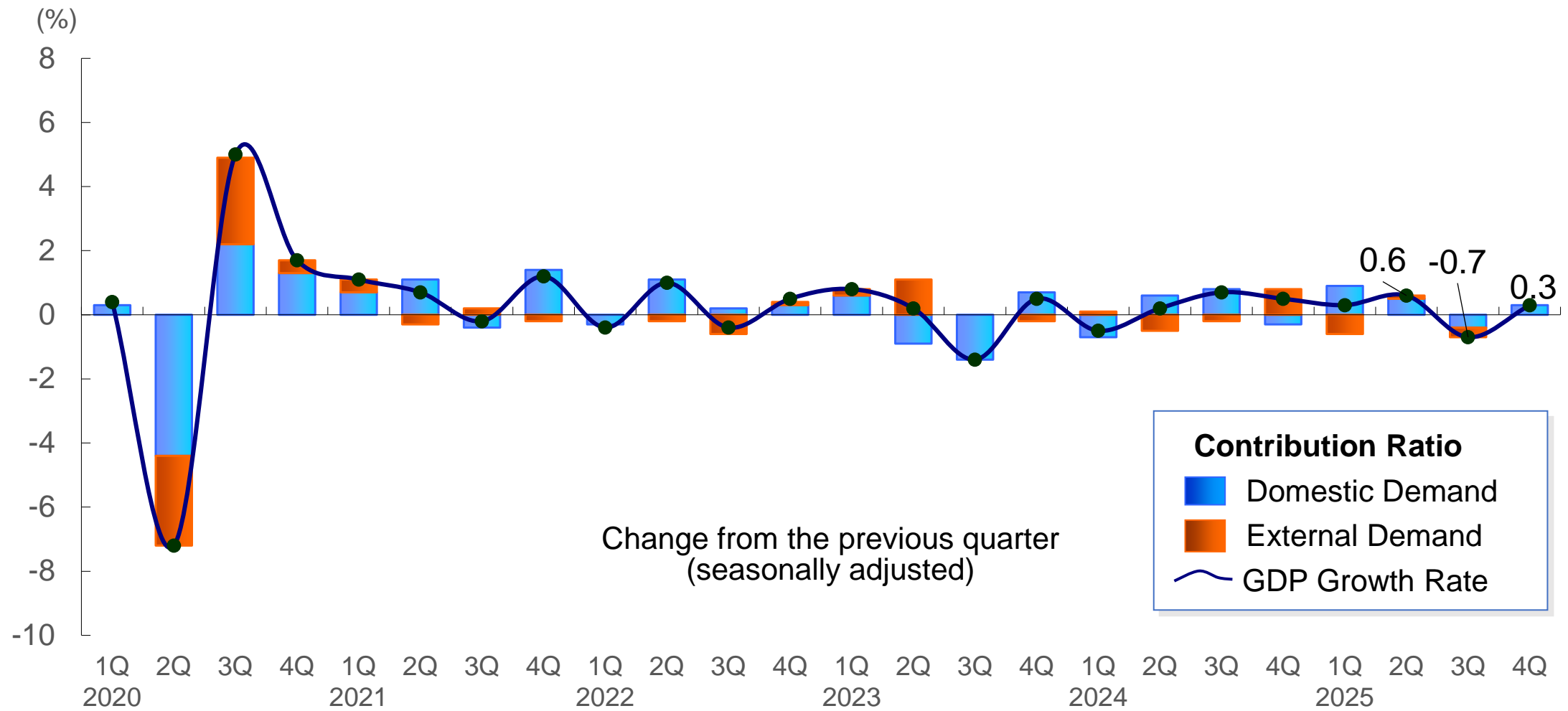
**02. Current Situation of Textile and
Chemical Fiber Industry in Japan**

03. JCFA's sustainability strategy

01

Overall Economic Situation of Japan

Fig.1 Japan's GDP growth rate



Source: Cabinet Office, Government of Japan

Fig.2 Short-term economic survey of Japan's enterprises

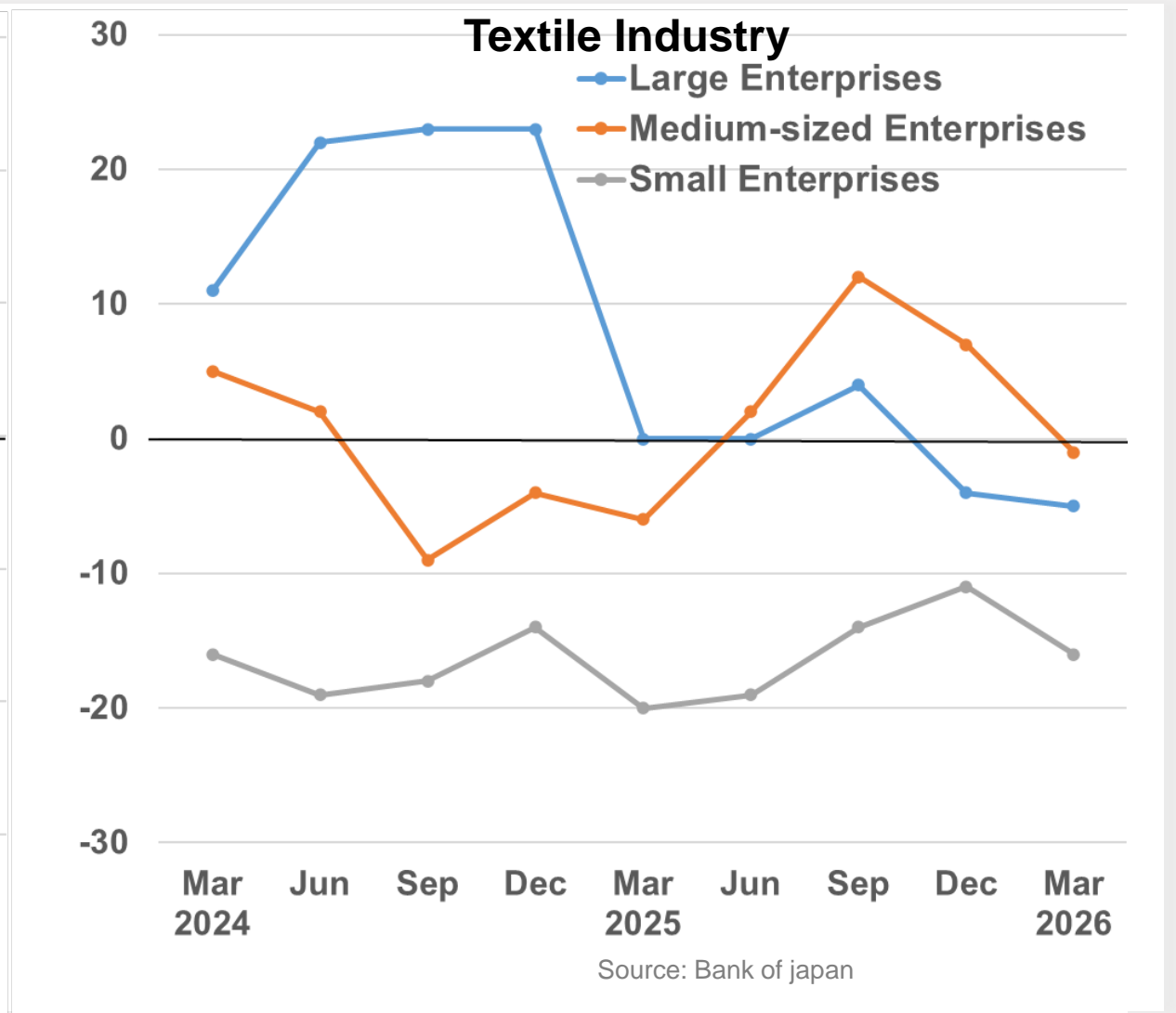
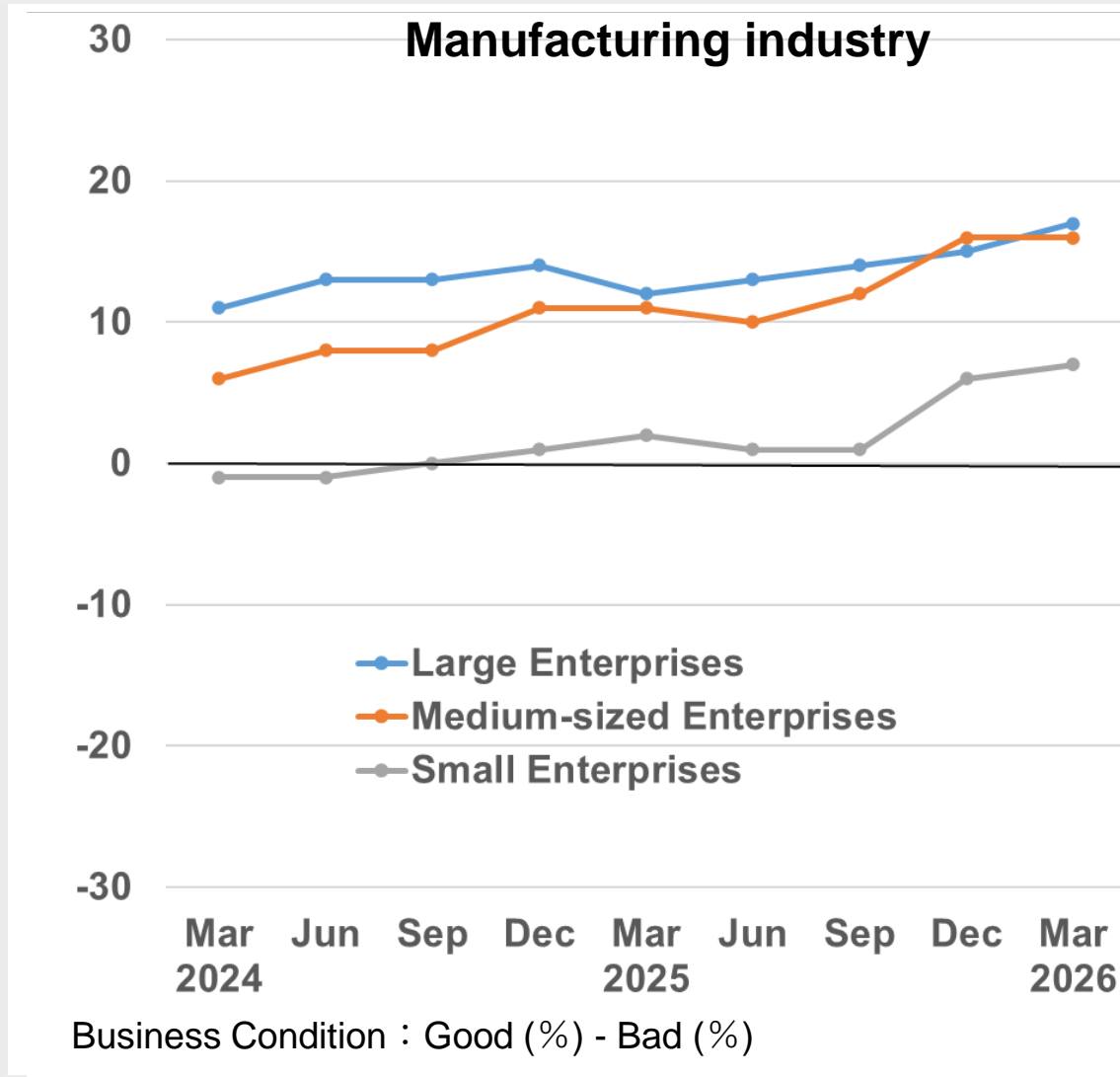


Fig.3 Recent Topic: Price and wage increase in Japan

Trends in Wage Increases

(% from Previous year)

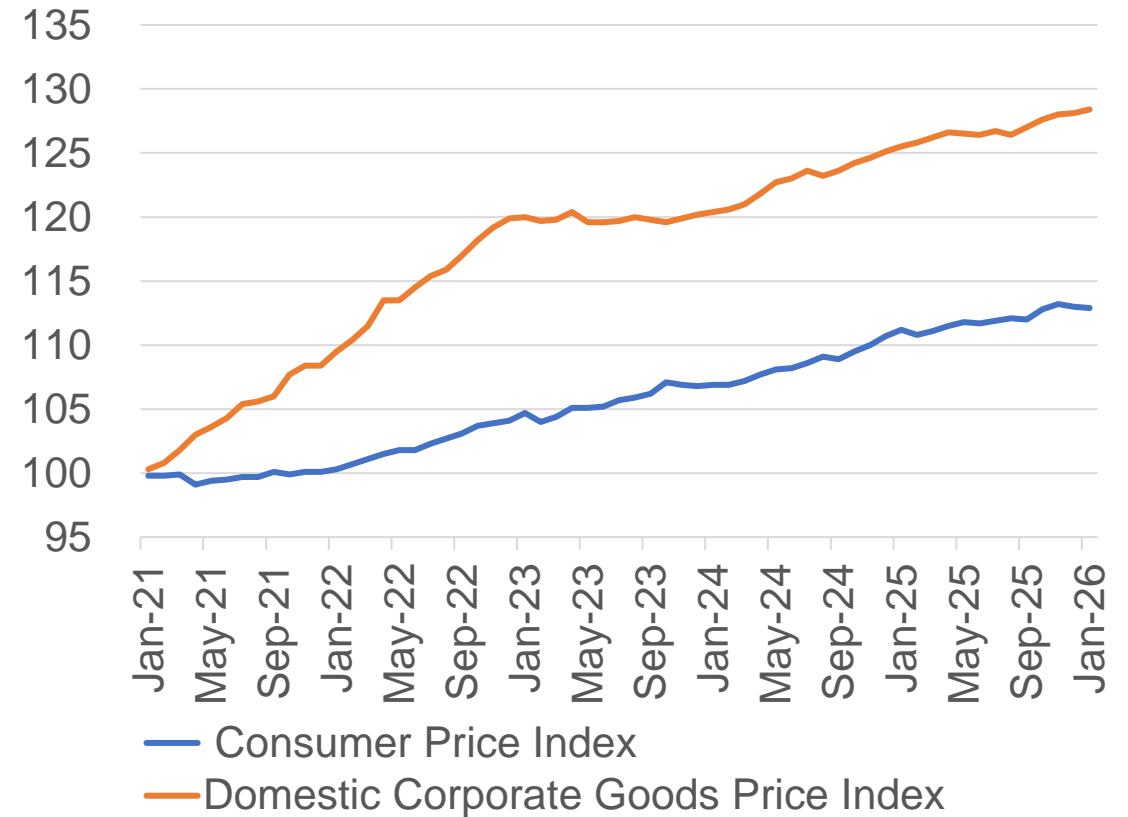
	Total	Medium/small companies
2017	1.98	1.87
2018	2.07	1.99
2019	2.07	1.94
2020	1.90	1.81
2021	1.78	1.73
2022	2.07	1.96
2023	3.58	3.23
2024	5.10	4.45
2025	5.46	5.09
2026	5.12	5.03

* As of March 24

Source: JTUC-RENGO, The Japanese Trade Union Confederation

Trends in Price Increases

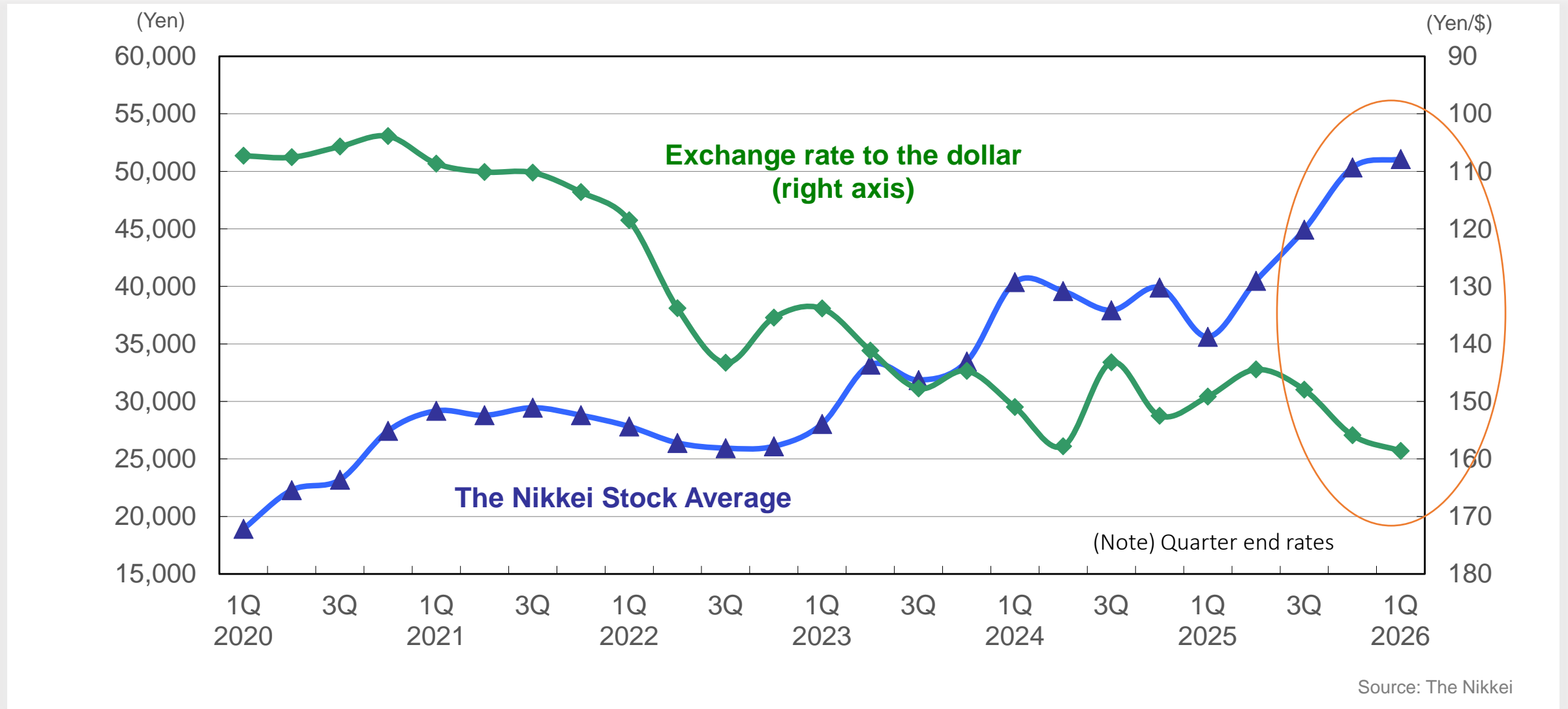
(2000 = 100)



Source: Bank of Japan

Ministry of Internal Affairs and Communications

Fig.4 Recent trends in stock price and exchange rates



02

Current Situation of Textile and Chemical Fiber Industry in Japan

Fig.5 Domestic Production Index of Textile Industry

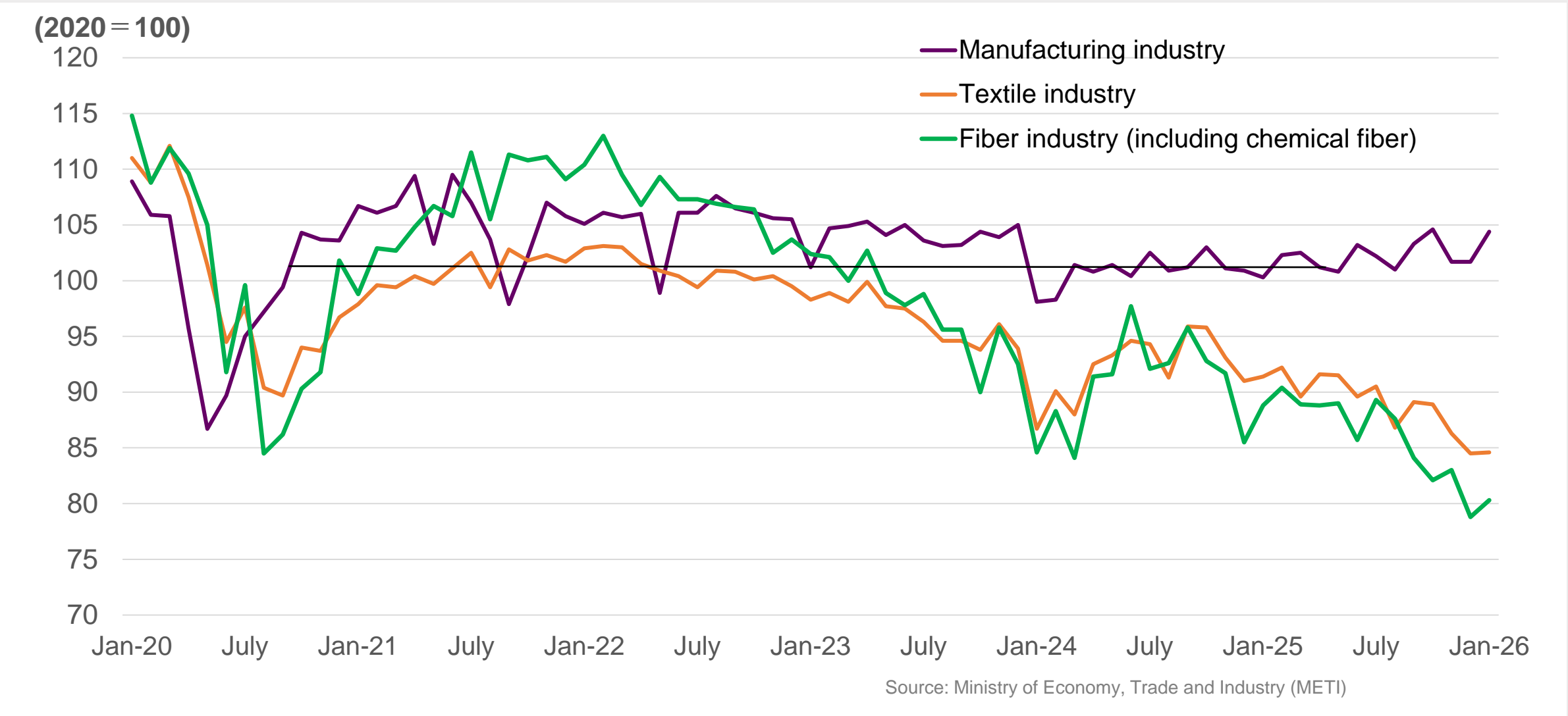


Fig.6 Major Textile-Related Economic Indicators

(% Change from the previous year)

	(1) Indicators relating to the demand for Apparel application		(2) Indicators relating to the demand for Non-apparel application		
	Clothing sales Department store	Clothing sales Supermarkets	Motor vehicle production	New housing starts	Construction orders
2021	3.5	▲1.9	▲2.7	5.0	2.0
2022	14.2	4.0	▲0.1	0.4	7.1
2023	10.1	0.9	14.9	▲4.6	▲3.1
2024	6.2	▲5.4	▲8.5	▲3.3	9.9
2025	▲2.2	▲1.8	2.1	▲6.5	3.8

Source: Japan Department Store Association, Japan Chain Stores Association, Japan Automobile Manufacturers Association, Inc. Ministry of Land, Infrastructure, Transport and Tourism

Fig.7 Production of Chemical Fibers in Japan

(1,000 tons)

	2021	2022	2023	2024	%*	2025	%*
Chemical fibers(1+2)	749	737	675	630	▲7	612	▲3
Synthetic fibers (1)	602	585	512	467	▲9	451	▲3
Nylon F	70	72	69	65	▲6	64	▲2
Polyester F	100	96	84	80	▲6	75	▲6
Polyester S	79	71	61	57	▲6	53	▲7
Acrylic S	97	94	82	76	▲8	78	+ 3
Others	256	252	216	190	▲12	182	▲4
Cellulosic fibers (2)	149	152	163	162	▲1	160	▲1

*change from the previous year

Source: METI

Fig.8 Mill Consumption in Japan (by Final Use of Chemical Fibers)

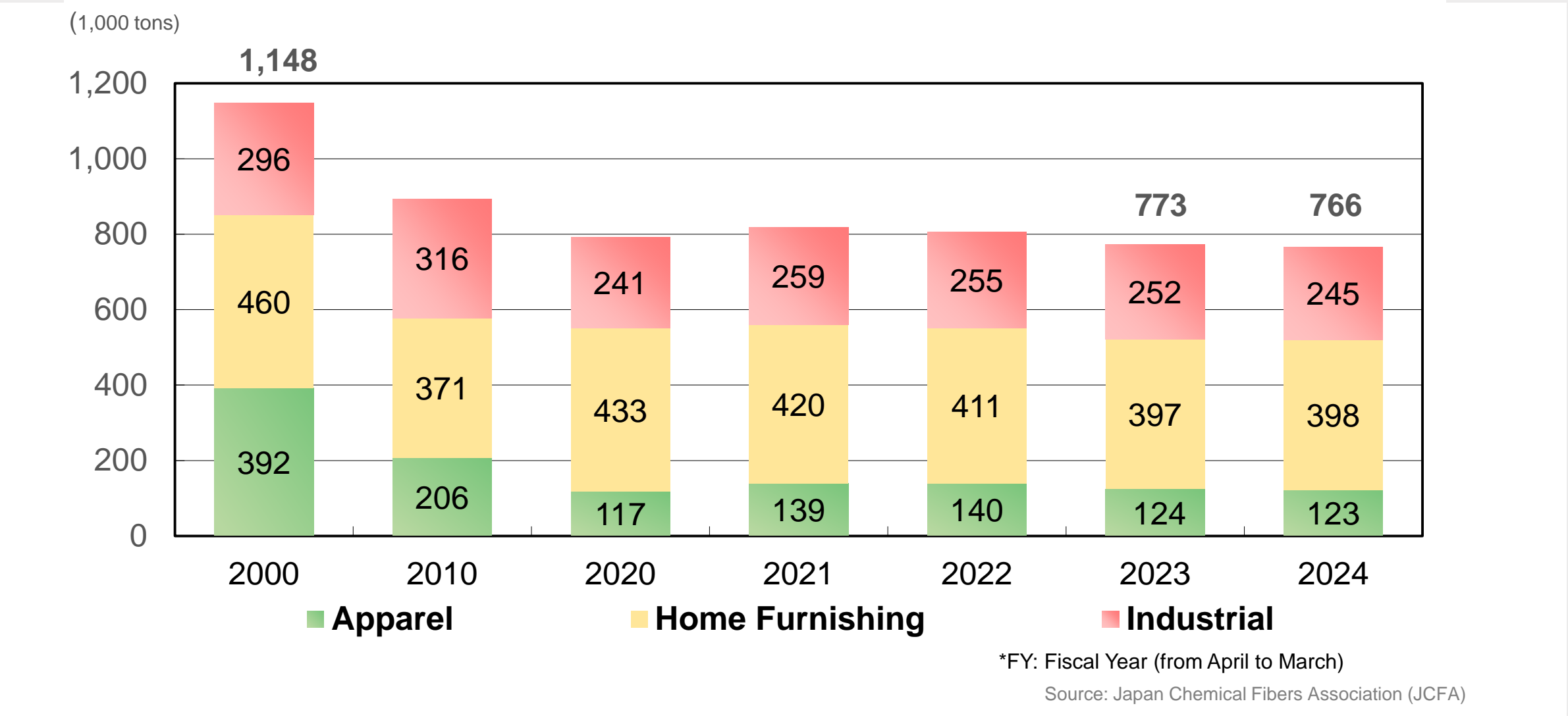
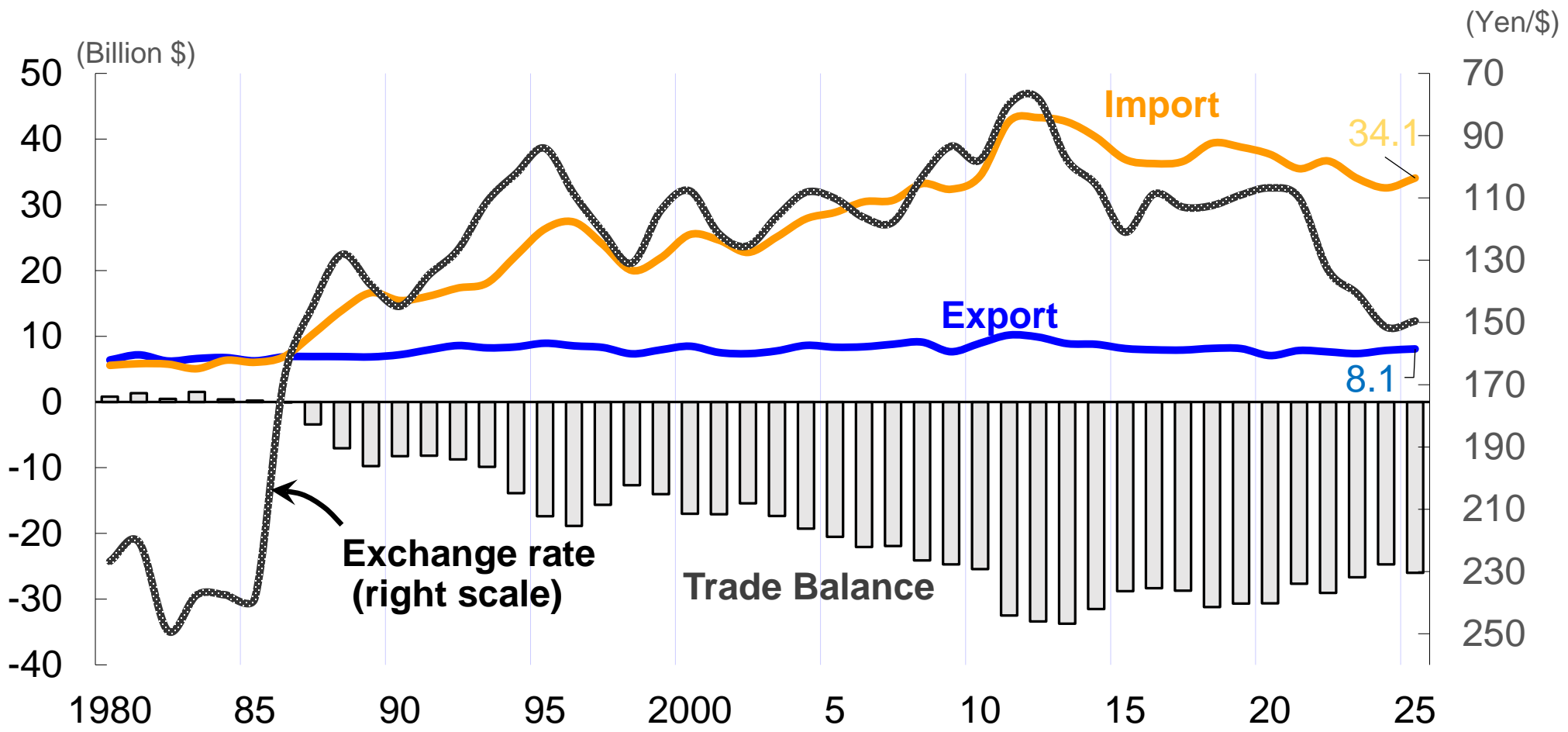


Fig.9 Japan's Textile trade



Source: Ministry of Finance (MOF)

Fig.10 Japan's Textile Trade (By Partner, Yen Basis)

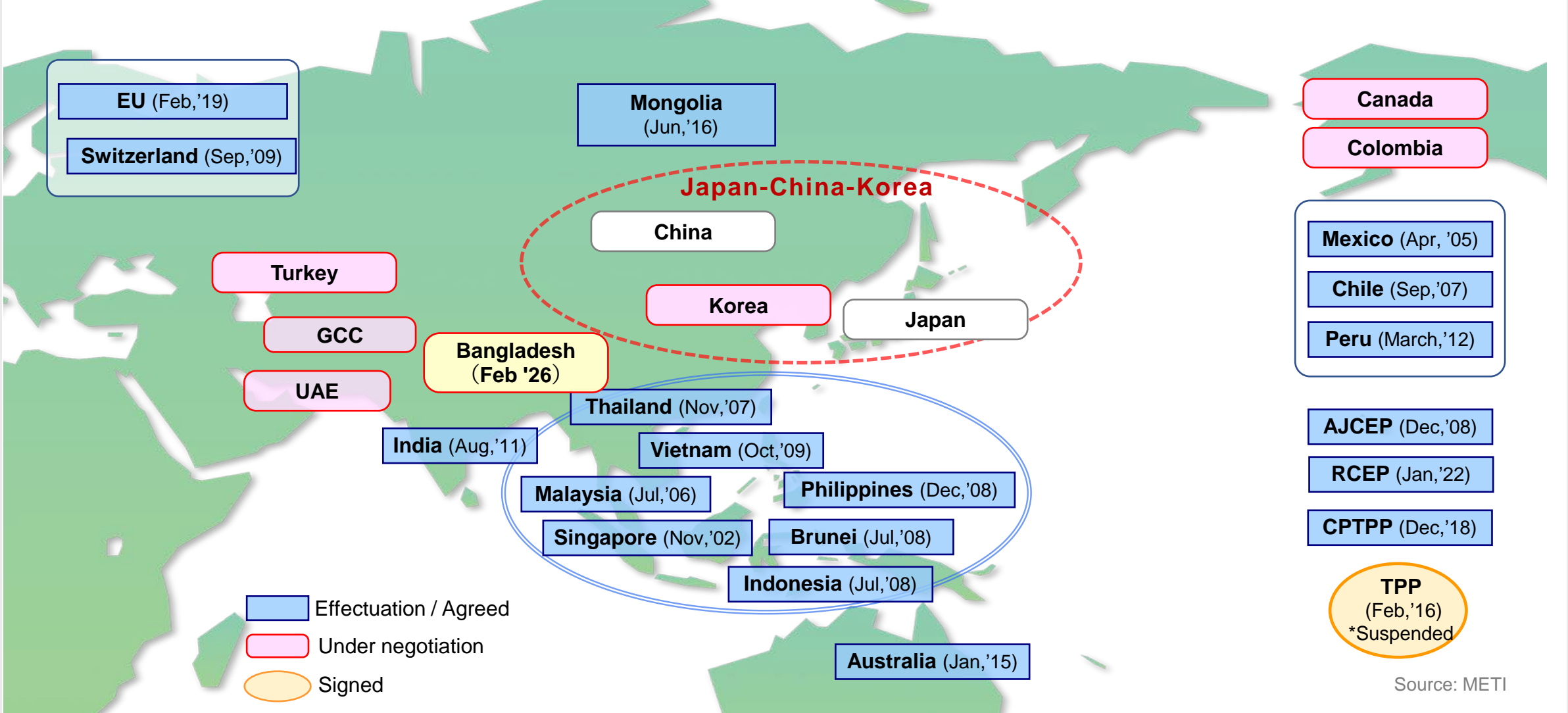
(Billion Yen)

(1) Exports	2023	2024		2025		Share(%)		
	Value	Value	%	Value	%	2023	2024	2025
Asia	694	788	14	802	2	67%	66%	66%
China	285	289	2	284	▲2	28%	24%	23%
ASEAN	247	297	20	311	5	24%	25%	26%
(Vietnam)	121	132	9	141	7	12%	11%	12%
Europe	134	167	25	176	5	13%	14%	15%
USA	106	105	▲1	101	▲4	10%	9%	8%
World	1,036	1,190	15	1,208	2	100%	100%	100%
(2) Imports	2023	2024		2025		Share(%)		
	Value	Value	%	Value	%	2023	2024	2025
Asia	4,324	4,423	2	4,588	4	90%	90%	90%
China	2,475	2,461	▲1	2,483	1	52%	50%	49%
ASEAN	1,469	1,560	6	1,680	8	31%	32%	33%
(Vietnam)	729	791	9	859	9	15%	16%	17%
Europe	352	382	6	395	1	7%	8%	8%
USA	60	62	6	61	▲2	1%	1%	1%
World	4,788	4,923	3	5,101	3	100%	100%	100%

*change from the previous year

Source: MOF

Fig.11 Progress of Japan's FTA



03

JCFA's sustainability strategy

Fig.12 JCFA's sustainability policies in FY2025

Priority issues

1. The realization of textile-to-textile recycling
2. Expansion of recycled chemical fibers
3. Expansion of bio-based chemical fibers
4. Carbon neutrality initiatives
5. Chemical substance management
6. CSR procurement initiatives

Fig.13 JCFA's work toward carbon neutrality

Japan's CO₂ Emissions Trading System (GX-ETS)

1. Start Date

Full-scale mandatory operation has been launched as of **April 2026**, following the pilot phase in 2023

2. Objective

Incentivizing decarbonization investments to balance industrial competitiveness with emissions reduction.

3. Eligible Companies

Firms emitting **≥100,000 tons of CO₂** annually on average over the past 3 years
(large corporations and energy-intensive sectors)

4. Mechanism

Government allocates **emission caps** and companies must **hold and trade allowances** equivalent to actual emissions, Allocation methods: **Grandfathering** or **Benchmarking**

Progress toward 2030 Targets by Japan's chemical Fiber Industry

(2025 figure, base year 2013)

- Energy consumption : **36% reduction**
- CO₂ emission : **36% reduction**

*Chemical Industry's 2030 Targets by the Keidanren's Low Carbon Society Action Plan is 32% reduction based on the figures of FY2013

Thank you