

Enhancing Sustainable Aviation Connectivity

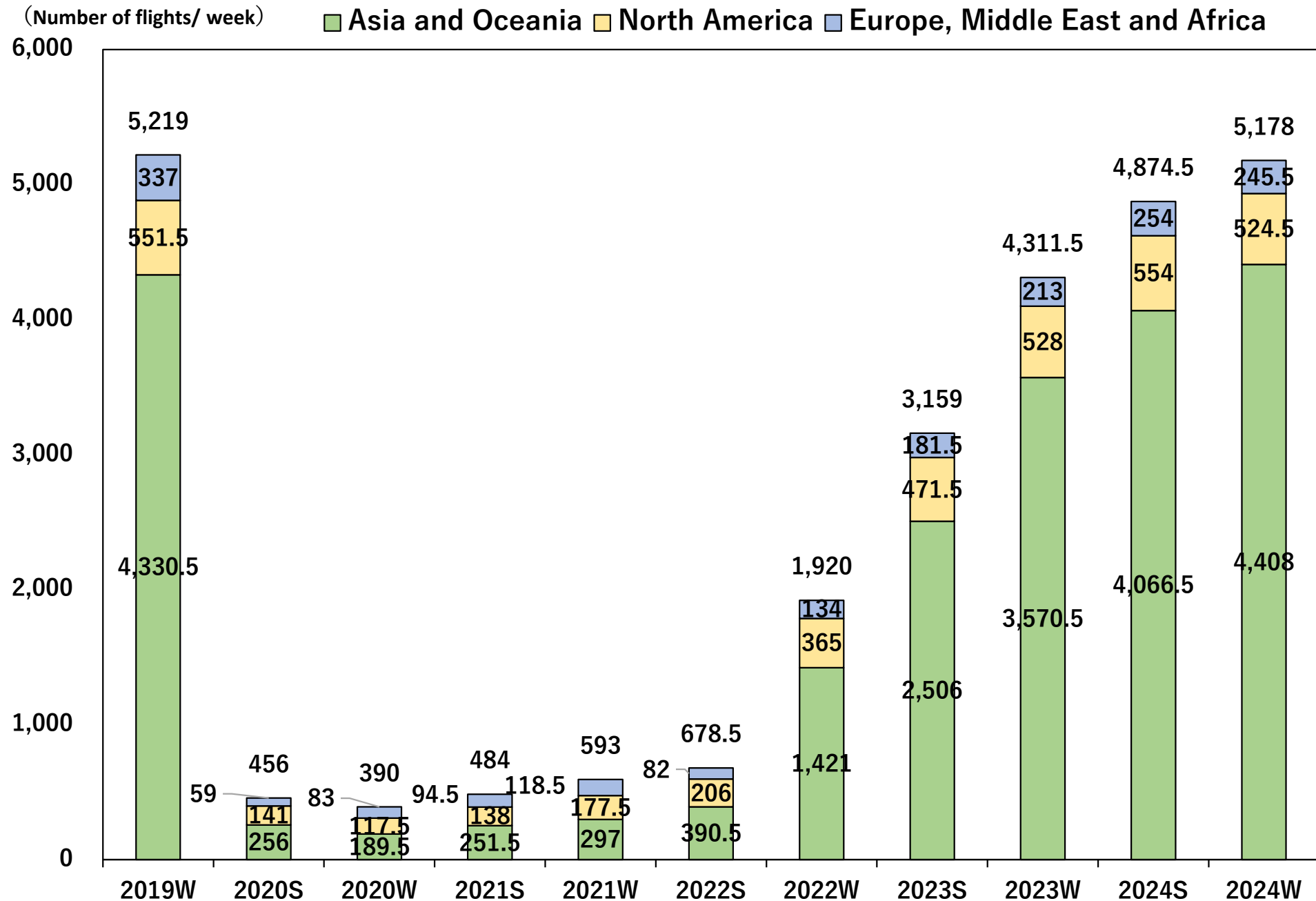
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Rieko NAKAYAMA

Assistant Vice-Minister for International Aviation
Ministry of Land, Infrastructure, Transport and Tourism, Japan

1. Overview of Recent International Civil Aviation Trend in Japan

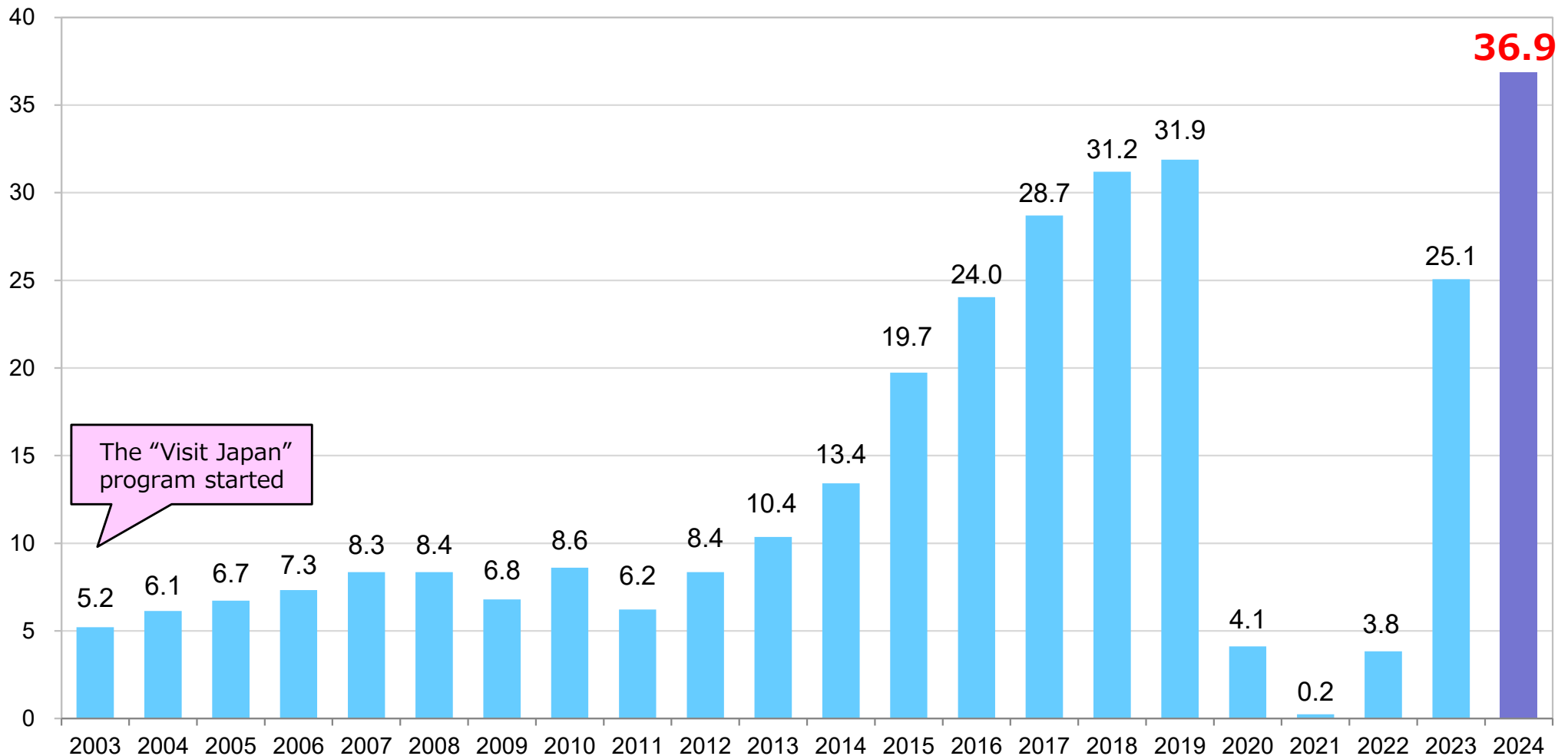
1. Number of international scheduled passenger flights to/from Japan



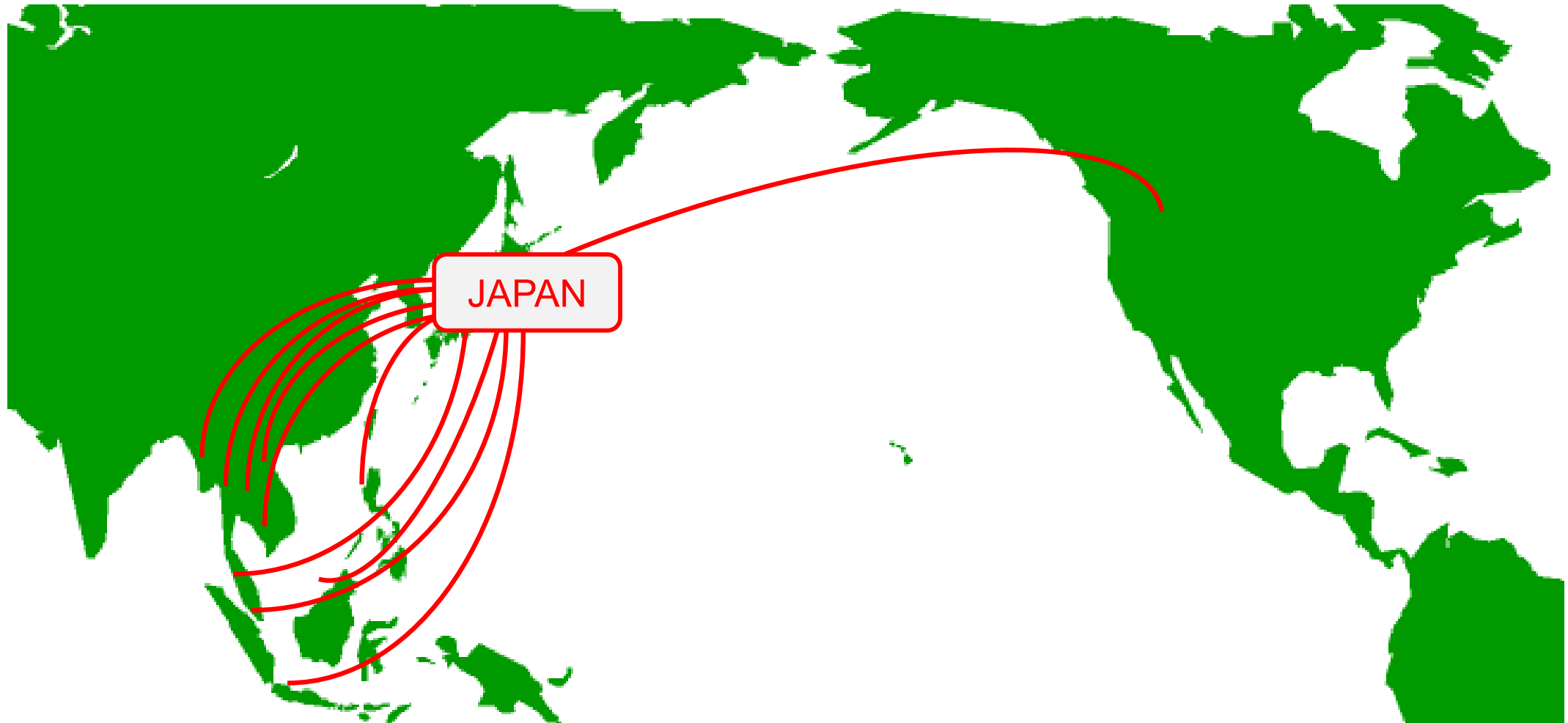
2. Increase in International Visitors to Japan

- The number of international visitors to Japan was 37million in 2024, a 47% increase from the previous year and a 16% increase compared to 2019, setting a new record high.
- With a view to the government's target of 60 million international visitors by 2030, "sustainable tourism," "increase in tourism consumption," and "promote regional attraction" are important.

million people



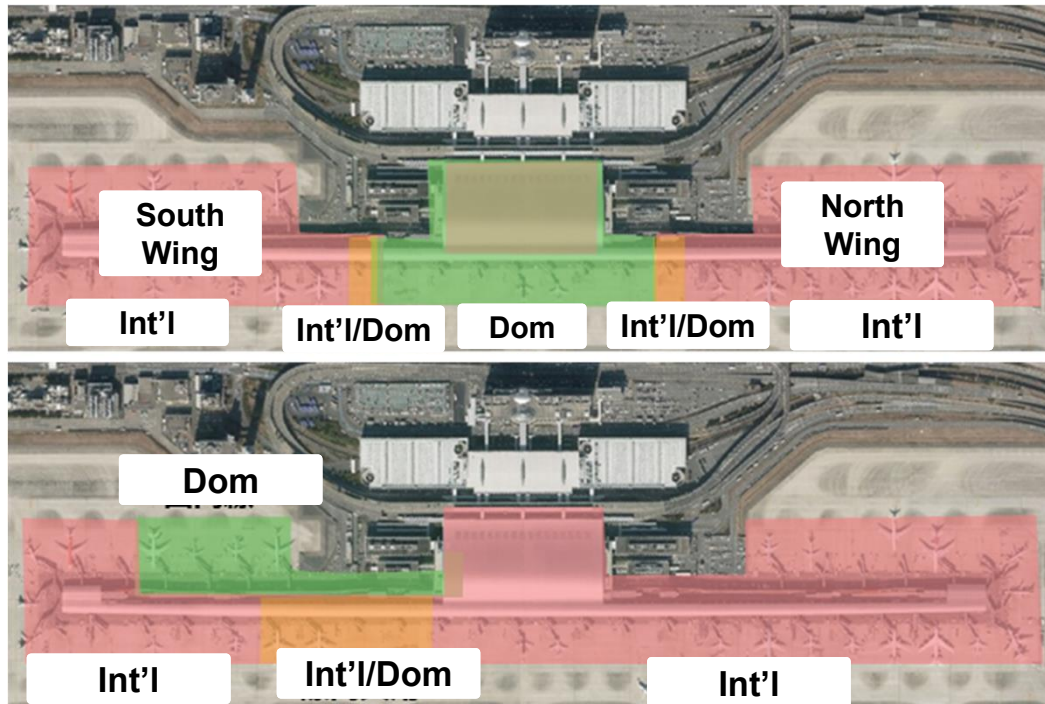
- Japan has a geographical advantage as a hub connecting North America and Asia.



2. Japan's Efforts to Enhance Sustainable Aviation Connectivity

4. Further Functional Enhancements of Airports

Kansai International Airport



Grand Opening on March 27 2025
(International Terminal)

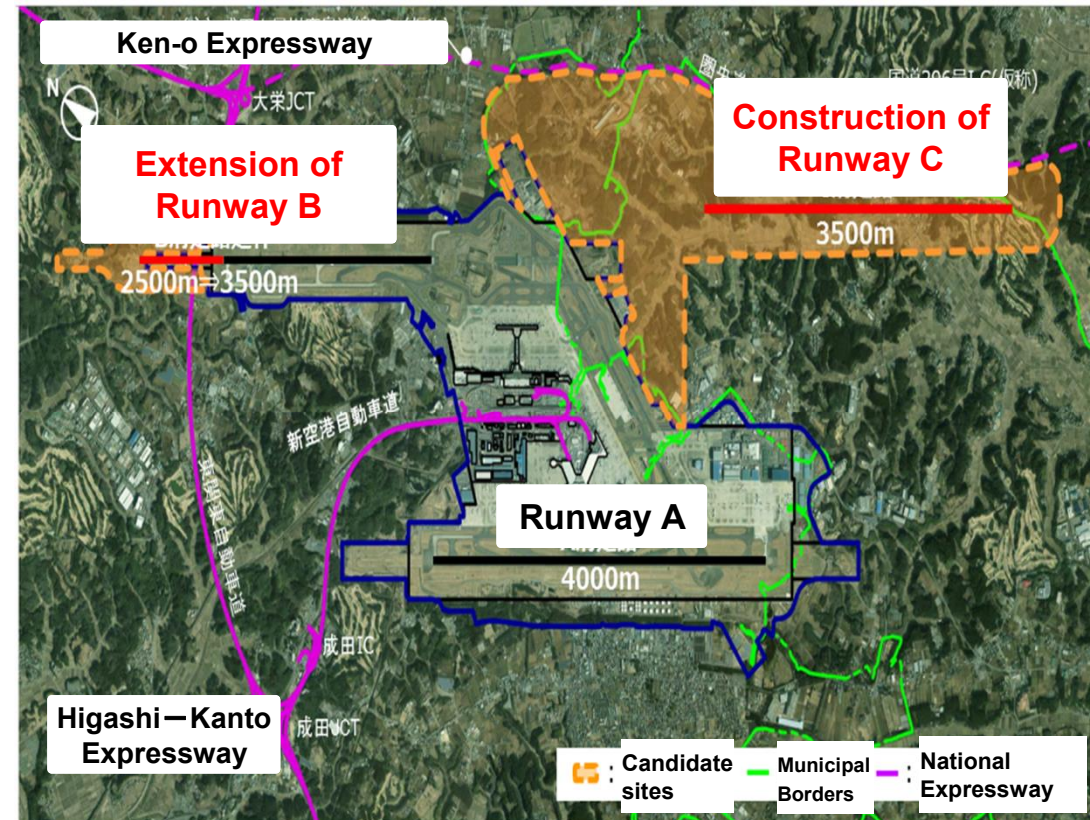


New Security Checkpoint

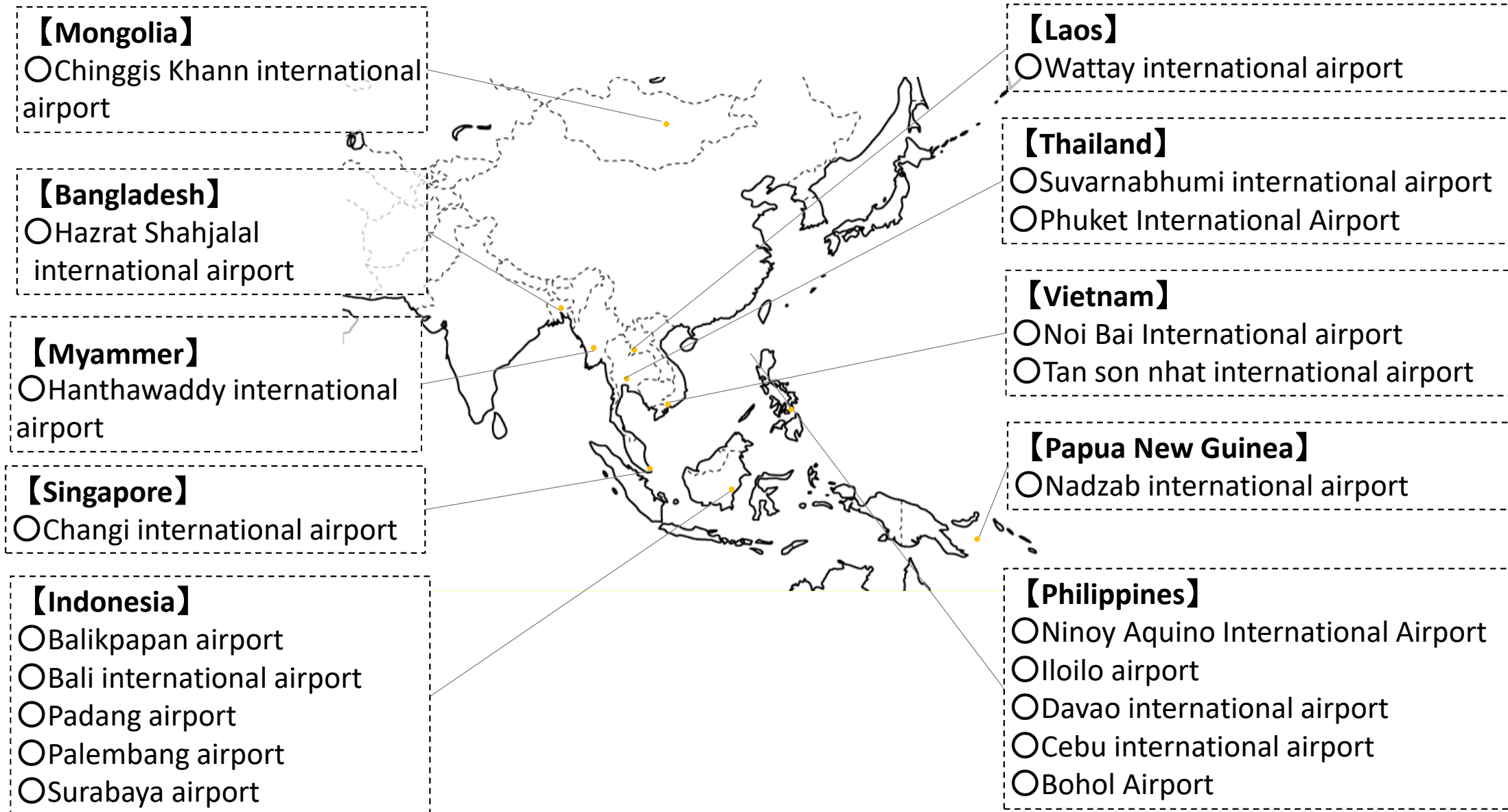


New Airport Lounge

Narita Airport



Examples of Airport development projects in ASIA Japan was involved in

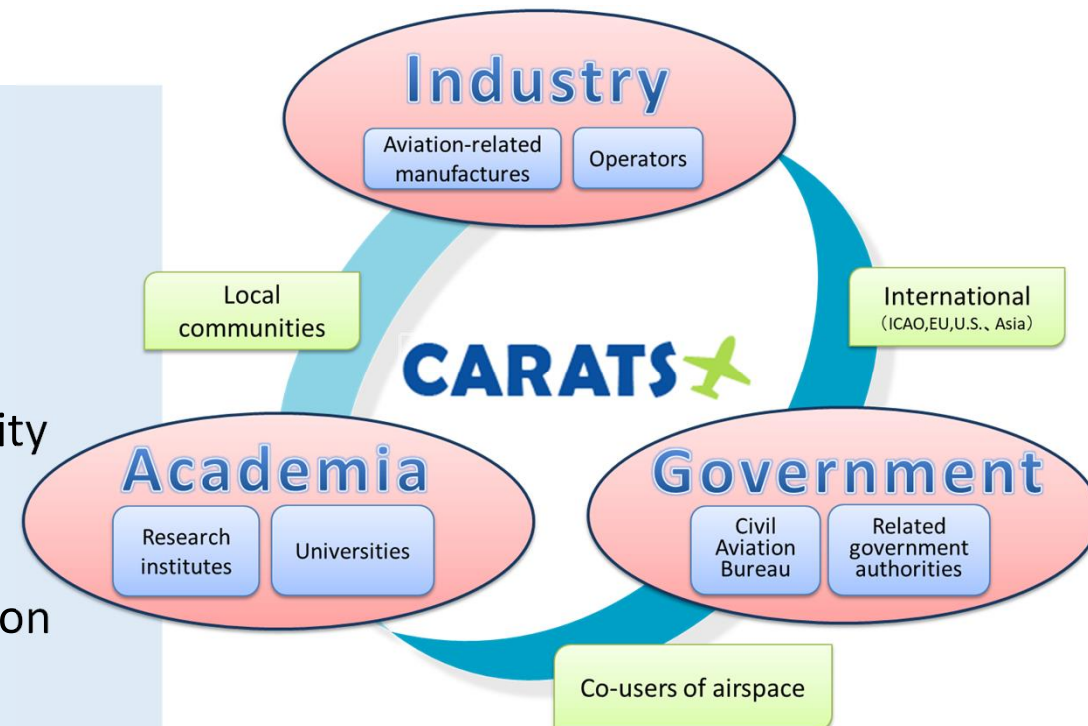


💡 What is CARATS ?

- ✓ Collaborative Actions for Renovation of Air Traffic Systems (CARATS) is a long-term action plan to renovate air traffic systems in Japan, with its first edition covering the period from 2010 to 2025.
- ✓ JCAB is updating the plan with a target year of 2040 to address increasing aviation demand, next-generation mobility, GX, DX, international trends, etc.

💡 Six key objectives

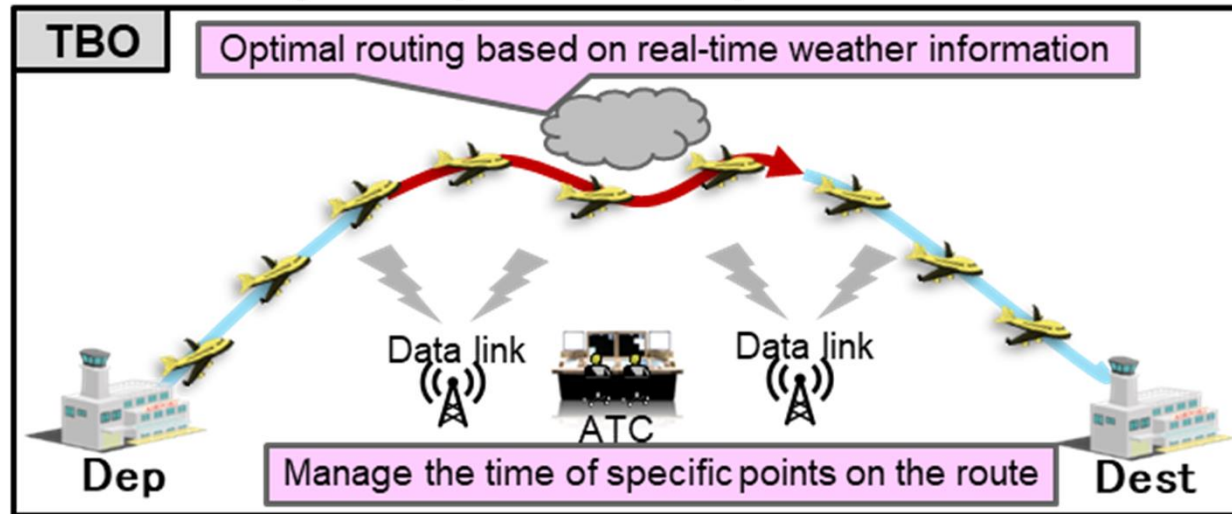
1. Enhancing safety measures
2. TBO for optimal aircraft operation
3. Sustainable air transport
4. Effective use of airspace for diversified air mobility
5. Strengthening resilience
6. International cooperation and overseas promotion



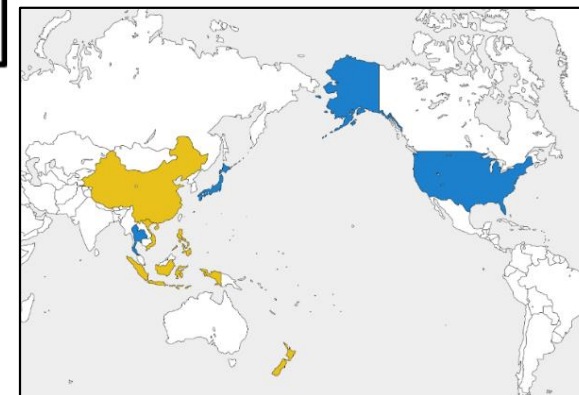
7. TBO Validation Activities

- TBO (Trajectory Based Operations) : a new concept for optimal aircraft operations) contributes to safe and efficient flights as well as carbon neutrality.
- In June 2023, in collaboration with the aviation authorities of the United States, Singapore and Thailand, as well as Boeing company, we conducted the world's first test flight using an actual aircraft to verify the feasibility of Trajectory Based Operations.
- The “APAC TBO Pathfinder Project” started in 2024.

● TBO: Trajectory Based Operations



ecoDemonstrator
Boeing 787



- Continued participation from MR TBO Demonstration
- New participation in Pathfinder Project

Public-Private Council for the Promotion of SAF

Japan's quantified target : Replace 10% of fuel consumed by Japanese airlines with SAF by 2030



To accelerate actions toward achieving the target, JCAB has established a Public-Private Council in 2022.

Purposes

- ✓ Facilitate domestic SAF production
- ✓ Establish SAF supply chain including imported SAF

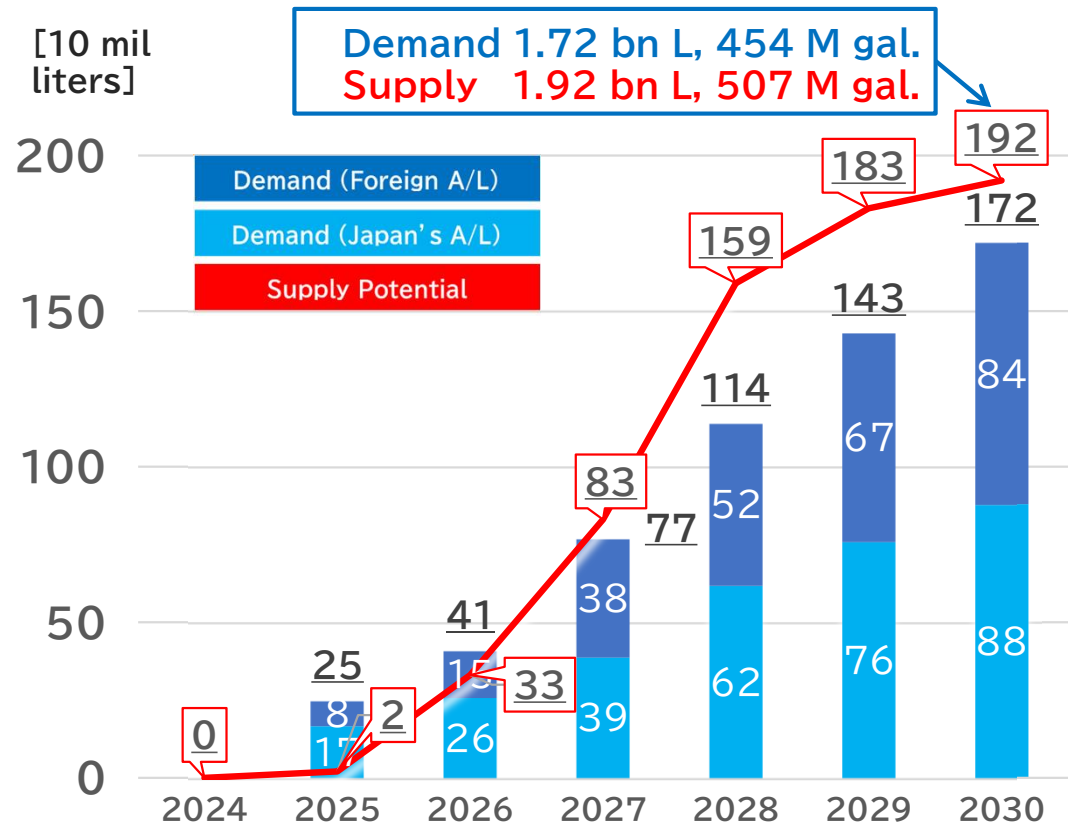
Key outcomes

- ✓ Make future projections of demand & supply
- ✓ Develop regulatory and support policies

Members

- ✓ Private sector: Airlines, airport companies, oil companies, etc.
- ✓ Public sector: METI (Energy), MoE (Environment), MAFF(Agriculture), MLIT (JCAB)

Projection of SAF Demand and Supply in Japan



Regulations

(Fuel Supplier)

- The SAF supply target for 2030 (5% carbon reduction) set in line with the global aspirational vision adopted by ICAO

(Airline)

- The SAF use target for 2030 (10%) set in each airline's decarbonization promotion plan

Support

(CAPEX) (336.8 Bn JPY in total)

- Support for initial investment

(OPEX)

- Introduction of tax credit for SAF production (30JPY/liter)

Thank you