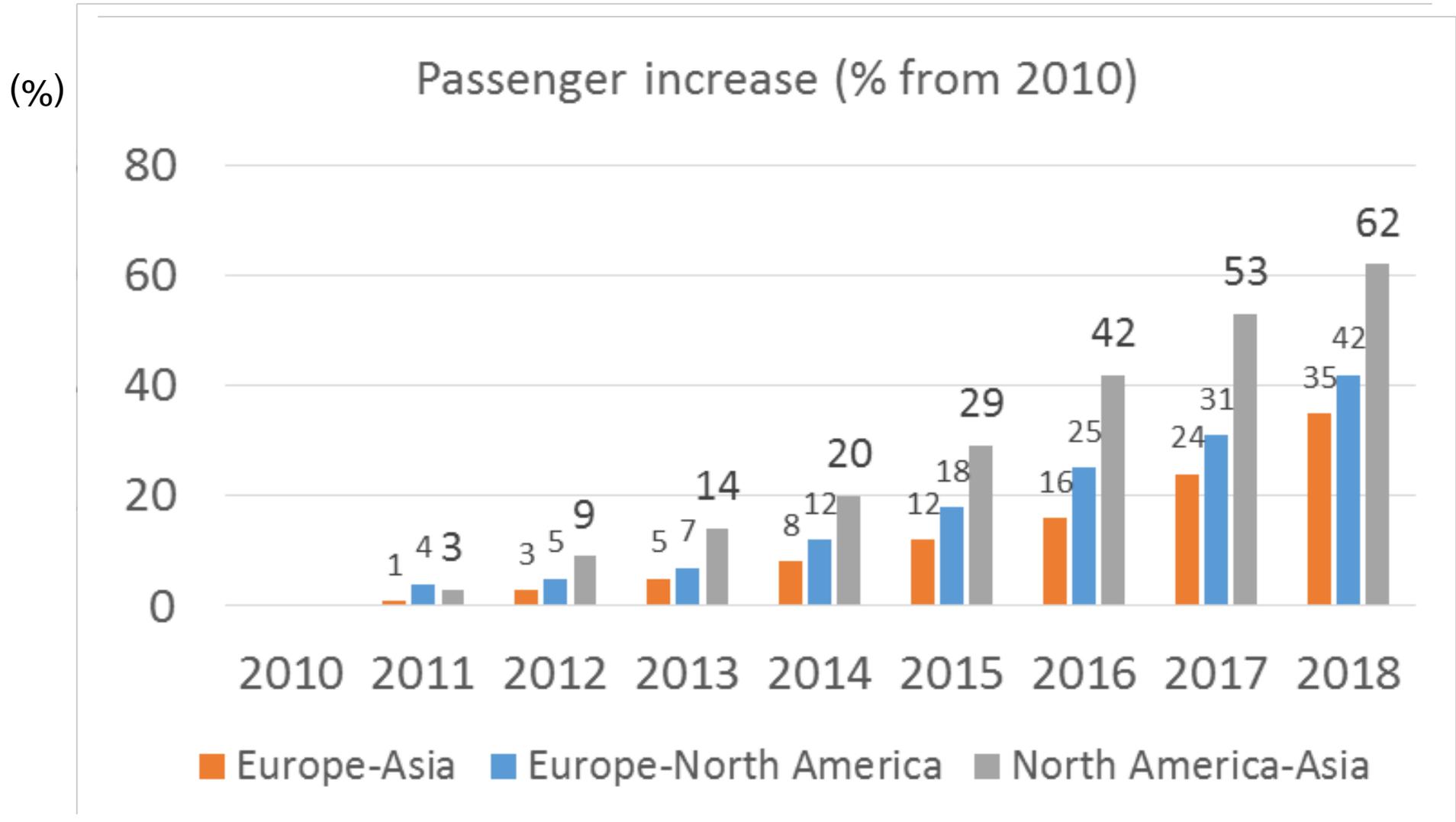


# The Future Prospect of Aviation in the Asia Pacific Region and Airports in Japan

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October 8, 2019  
JITTI USA symposium  
in Washington D.C.

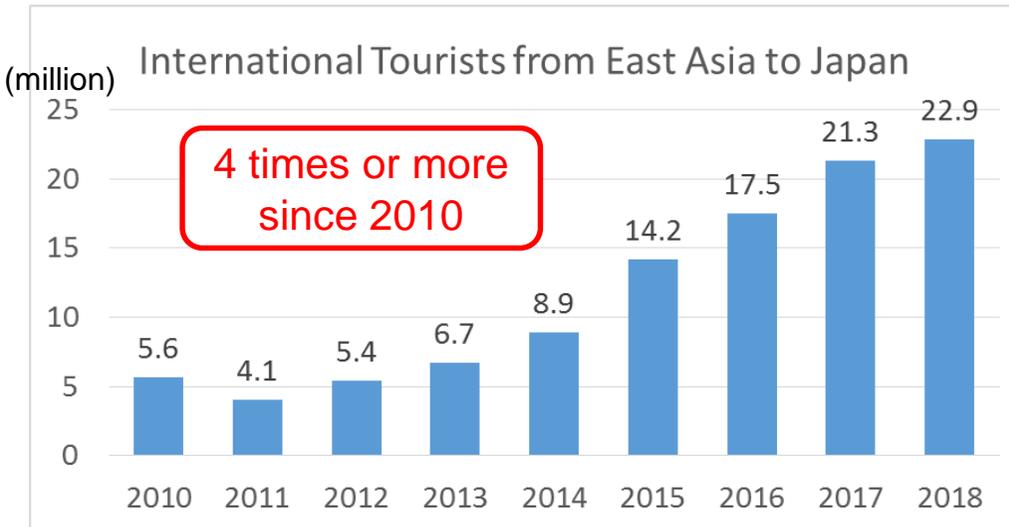
- The increase in passengers between North America and Asia surpasses that of travel between any other regions.



- The total number of international tourists to Japan exceeded 10 million in 2013.
- In 2018, it exceeded 30 million for the first time ever thanks to the steady growth of visiting tourists from Asia and other regions.



- Inbound tourists are not only from Asia (22mil. from East Asia and 3.3mil. from Southeast Asia) but also from various regions in the world.
- The strategic “Destination Campaign” worked effectively, through (customized online ads, attractive promotion based on marketing research, etc.)

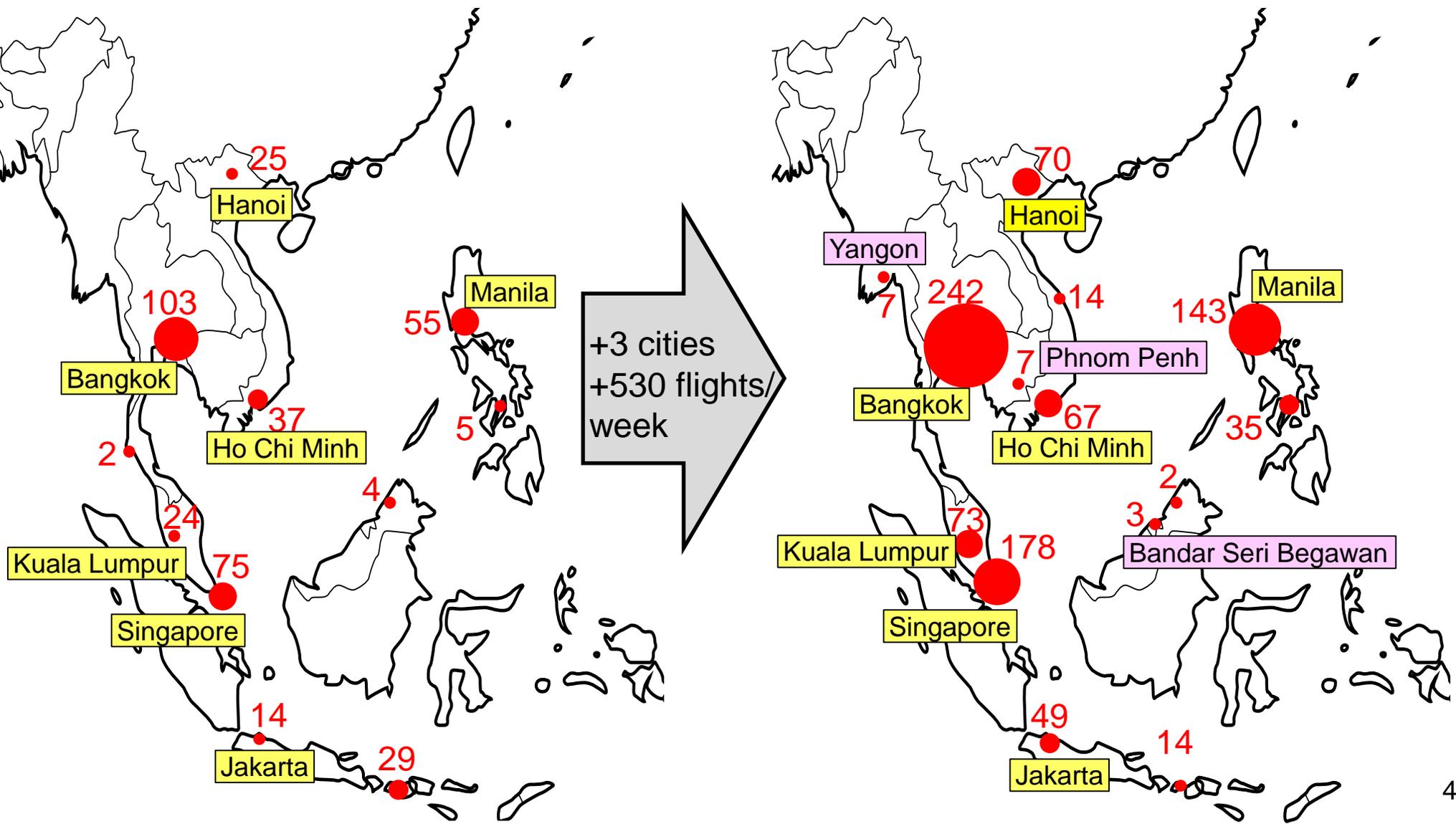


East Asia: China, South Korea, Taiwan, Hong Kong



2010 Summer (11 cities, 373 flights/week)

2019 Summer (14 cities, 903 flights/week)



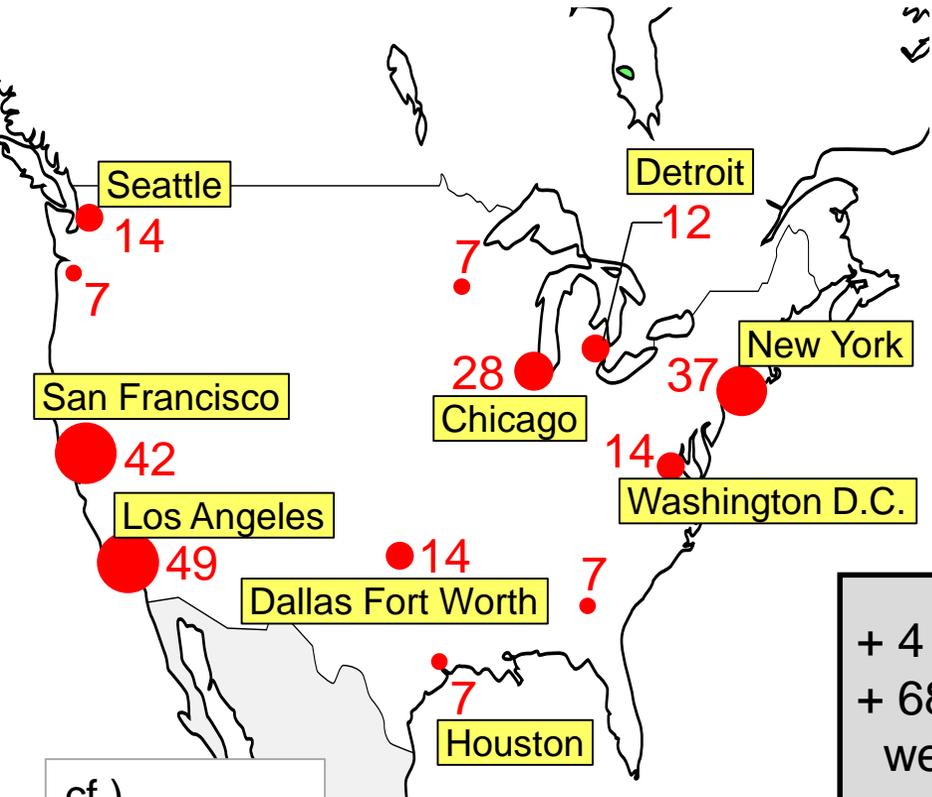
Note: Passenger flights as at the first week of each Summer schedule.

# Increased Nonstop Flights between Japan and U.S.

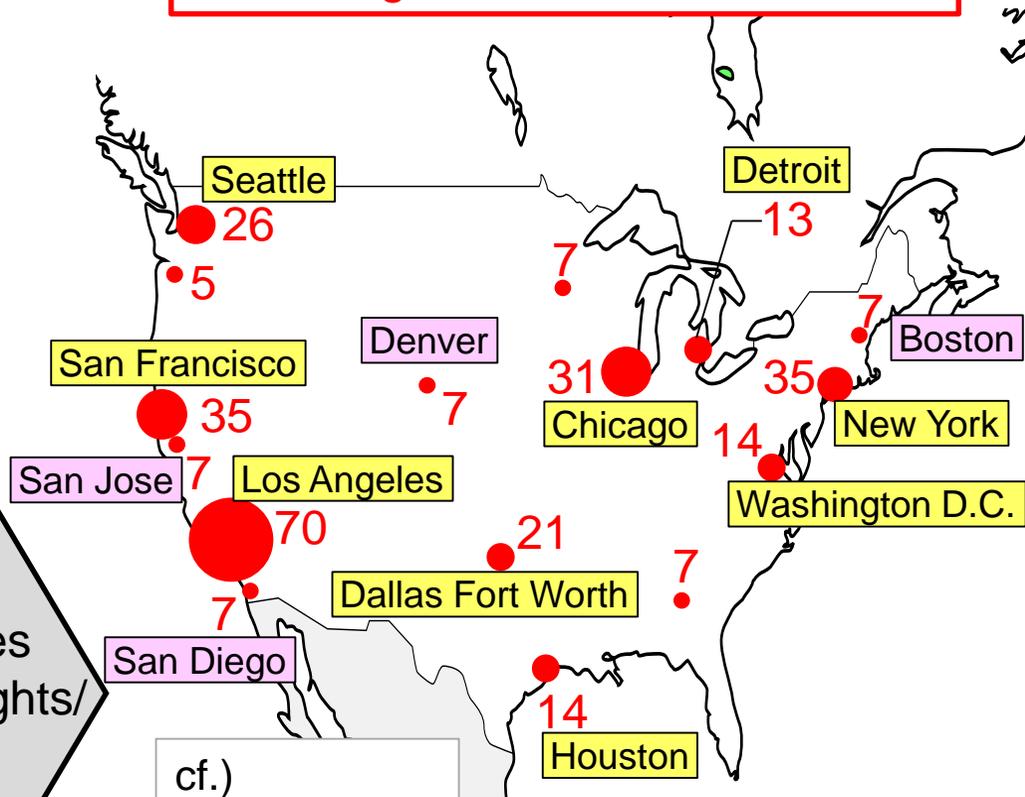
2010 Summer (12 cities, 238 flights/week)

2019 Summer (16 cities, 306 flights/week)

More flights from 2020 Summer!



+ 4 cities  
+ 68 flights/week

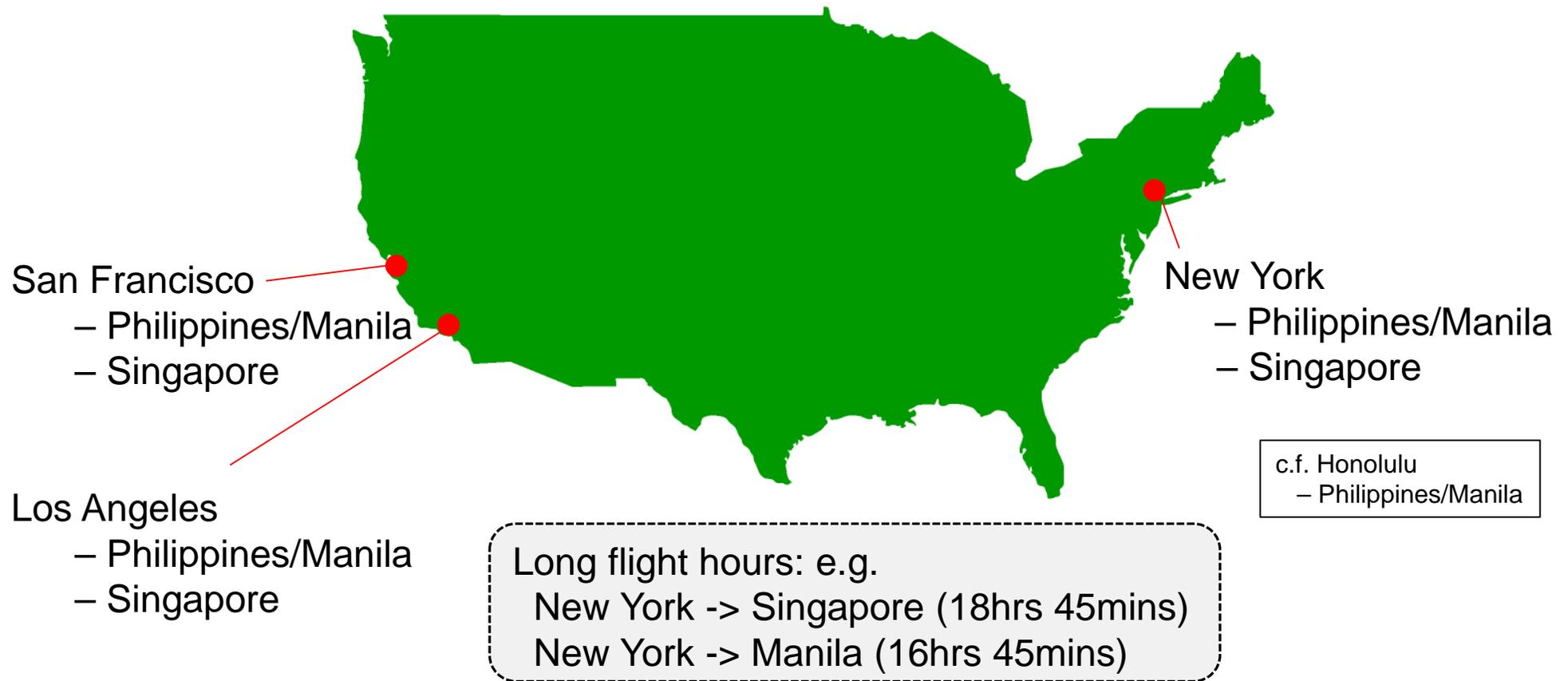


cf.)  
Guam: 128  
Honolulu: 75  
Kona: 7  
Saipan: 32

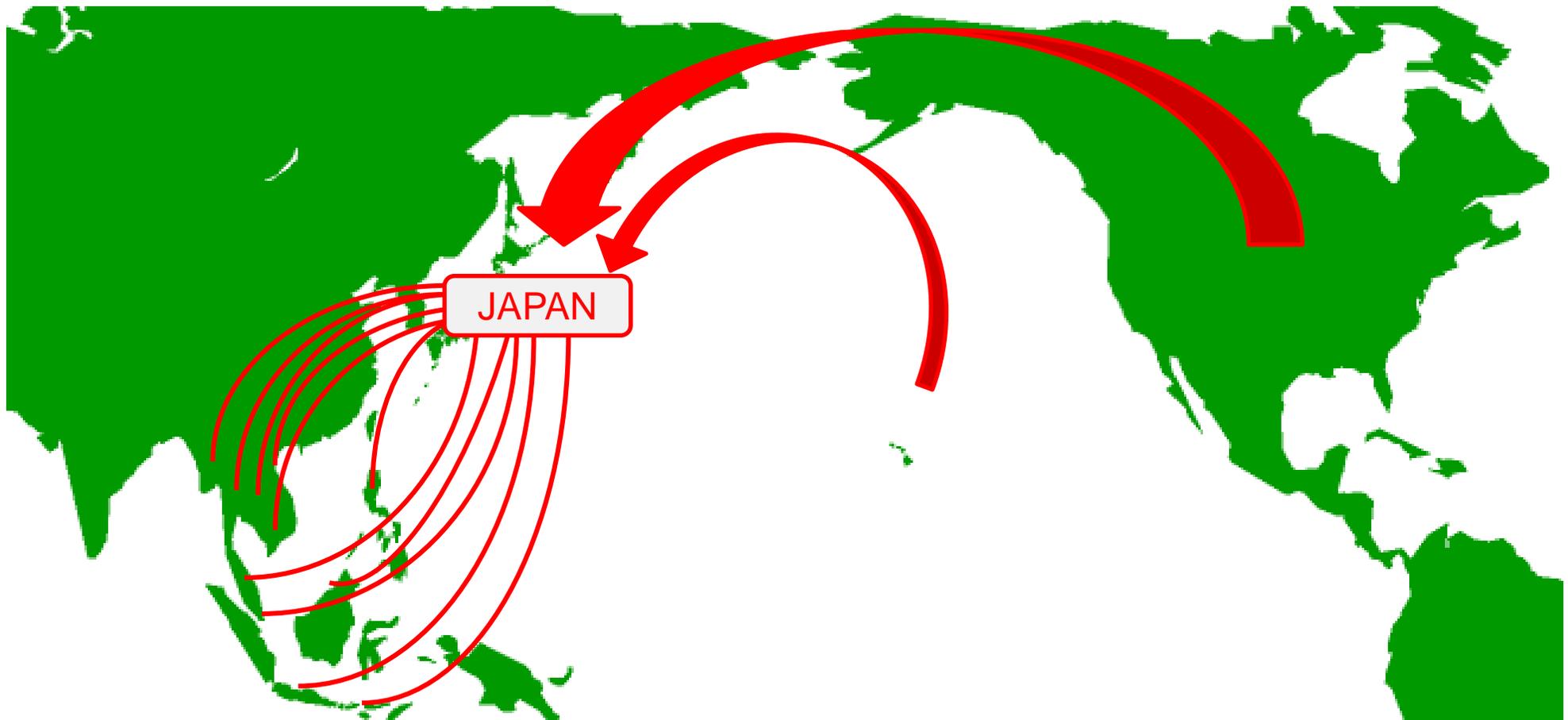
cf.)  
Guam: 70  
Honolulu: 137  
Kona: 10

Note: Passenger flights as at the first week of each Summer schedule.

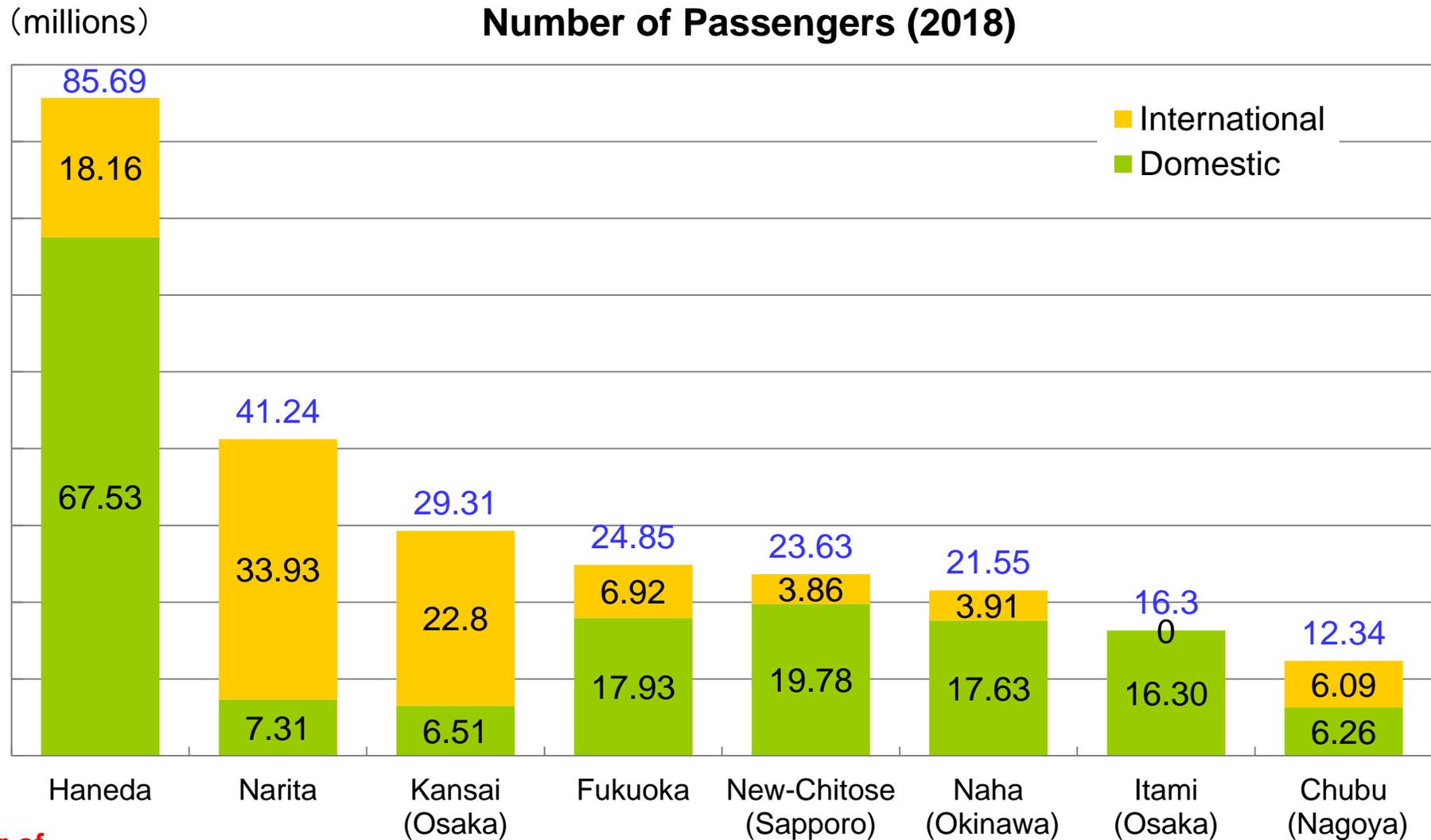
- The need for more direct flights between U.S. and Asia is triggered by new long range airplanes and increasing passenger demand for direct flights.
- Still, the number of cities in the U.S. and Asia linked by nonstop flights are limited; thus, connecting hubs are necessary between North America and Asia.



- Japan has the geographical advantage as a connecting hub between North America and Asia.
- As the number of nonstop flights between North America and Asia is limited, more frequent services between North America and Japan, as well as between Japan and Asia, can offer a wide range of choices for passengers when travelling.



■ Haneda and Narita are the two major airports in the Tokyo metropolitan area.



Number of Runways

4

2

2

1

2

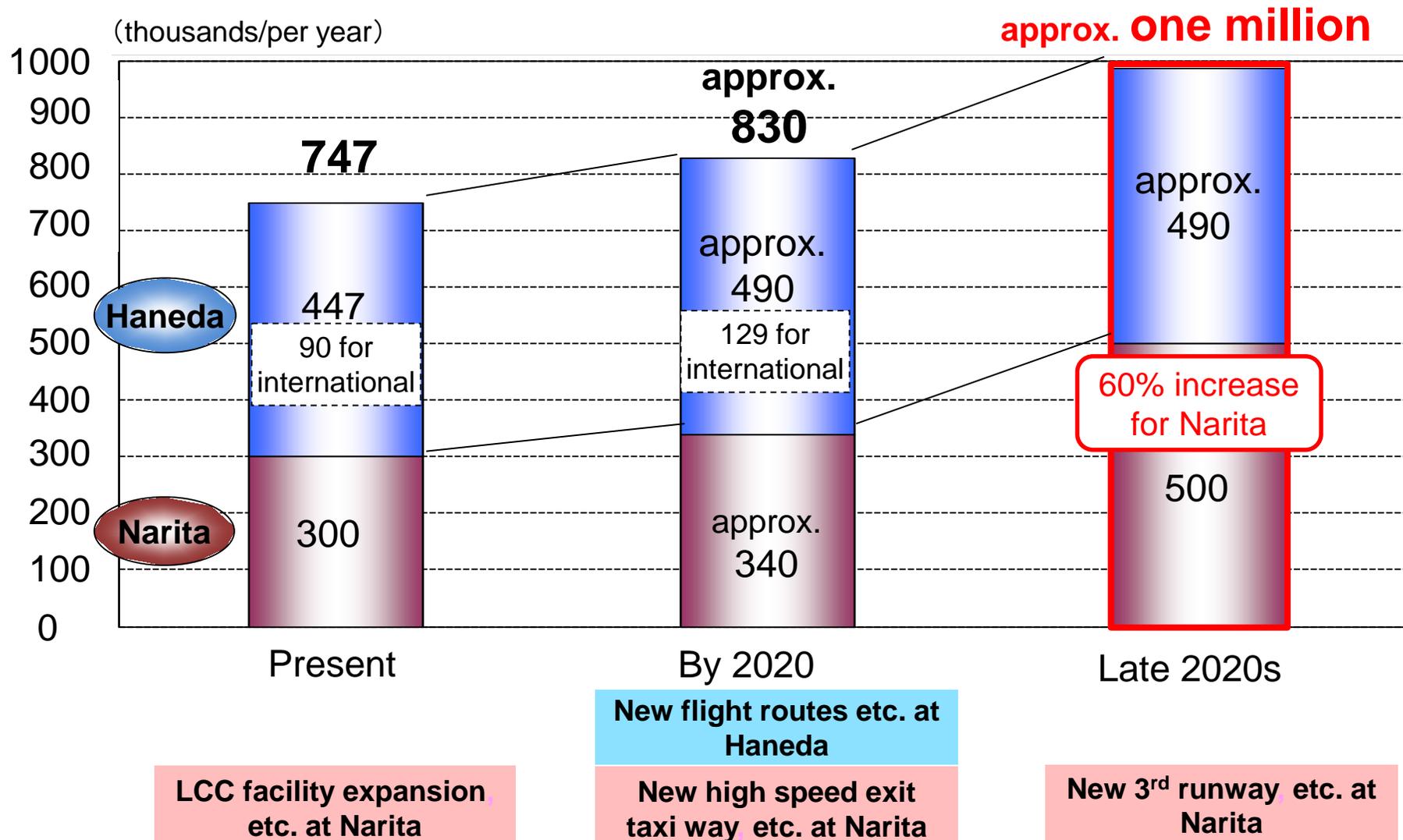
1

2

1

Note: Total may not be exact due to rounding.

- Our target is one million take-offs/landings, roughly the same as New York or London, by introducing new flight routes at Haneda and a new 3<sup>rd</sup> runway at Narita etc.

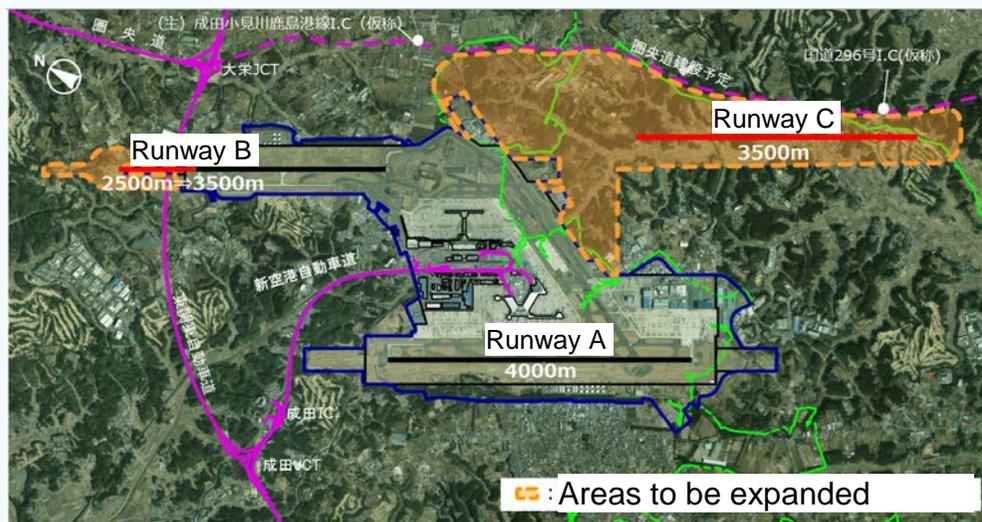


Note: Take offs and landings are counted separately (a take off and landing set is counted as two).

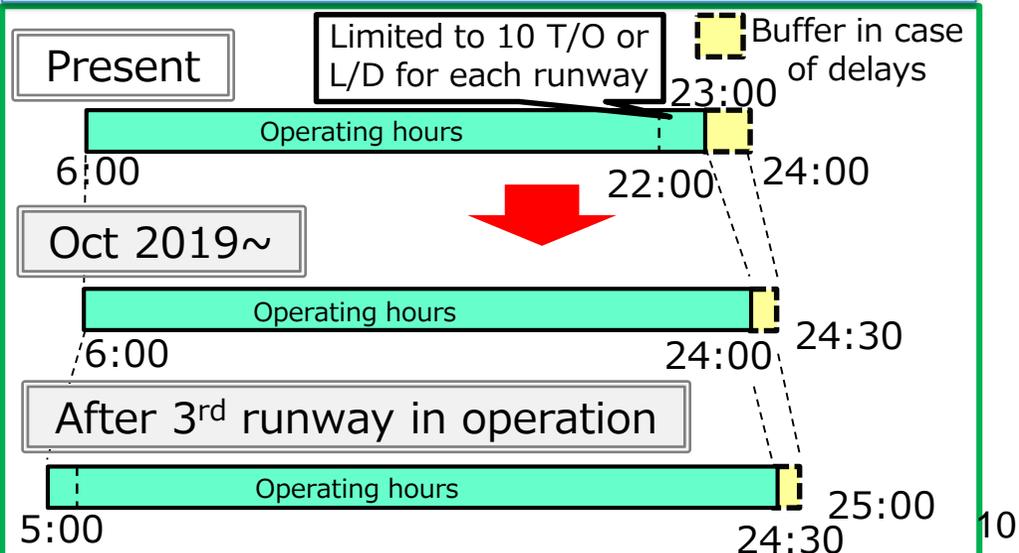
- Main international airport of the Tokyo metropolitan area
- Capacity increase targeting 500,000 from 300,000 take-offs/landings
  - 2<sup>nd</sup> runway B extension (from 2,500m to 3,500m)
  - New 3<sup>rd</sup> runway C construction (3,500m)
  - Night time slot increase by extending operating hours
- Increase of rapid train services and less expensive (approx. \$10) bus services to central Tokyo



## Runway B extension & new 3<sup>rd</sup> runway



## Increase night time capacity



- Strong air traffic demand from the Greater Kansai region around Osaka, the second largest population in Japan
- 24 hour operation with two runways (4,000m and 3,500m long)
- Integrated airport operations under private management which started in April 2016
- Upgrade of airport facilities: CIQ capacity increase, introduction of “Smart Security System” for the X-ray check process, and new International Terminal for Low Cost Carriers (Opened in January 2017)
- Aviation network enhancement by increasing the number of destinations in Asia



New International Terminal  
for Low Cost Carriers



- ❑ Nonstop flights to Seattle, Los Angeles, San Francisco, Honolulu, etc.
- ❑ Approx. 190 flights/week to Southeast Asia (Bangkok, Singapore, Manila, Hanoi, Kuala Lumpur, etc.)

- Strong air traffic demand from the Greater Nagoya region, the hub of major manufacturing industries, including car manufacturers and heavy industries
- Upgrade of airport facilities: New Low Cost Carrier Terminal (September 2019), new International Exhibition Center (August 2019), and Commercial Complex exhibiting “Flight of Dreams” (October 2018)
- Aviation network enhancement by increasing the number of destinations in Asia

Commercial Complex  
(FLIGHT OF DREAMS)

International  
Exhibition Center

New Commercial Complex  
showcasing the first flight test  
aircraft of Boeing B787



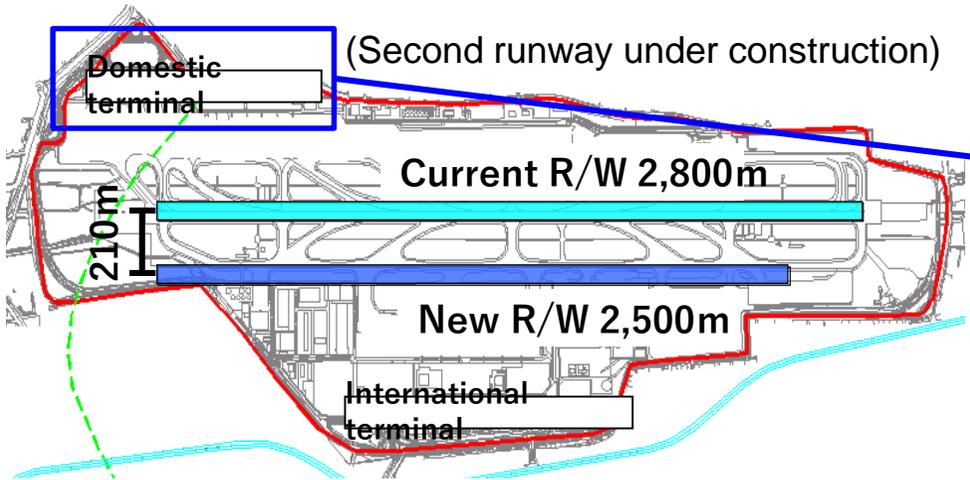
New Terminal for  
Low Cost Carriers

- ❑ Nonstop flights to Detroit and Honolulu etc.
- ❑ Approx.80 flights/week to Southeast Asia (Bangkok, Singapore, Manila, Hanoi, etc.)



## ■ Fukuoka

Passengers/year	International: 6.92
24.85 Million	Domestic: 17.93



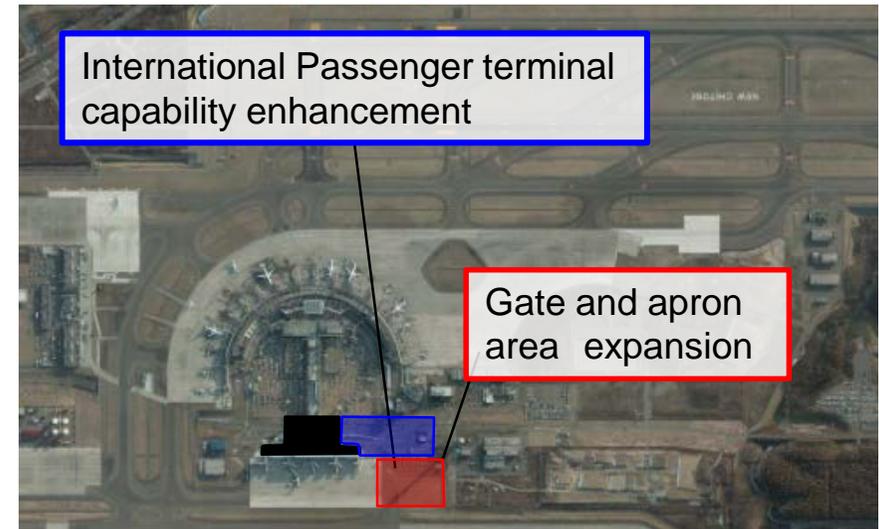
Hakata Ramen noodles

Photo: Provided by Fukuoka-city



## ■ New-Chitose (Sapporo)

Passengers/year	International: 3.86
23.63 Million	Domestic: 19.78



Sapporo Snow Festival



## ■ Promote the integrated airport management

### Present

Management is separated at each airport

➤ Government (MLIT)  
: Aeronautical activities  
(Runways, aprons, etc.)



➤ Private companies\*  
: Non-aeronautical activities  
(Terminal buildings, etc.)



(\* In many cases, joint public-private enterprises)



### New

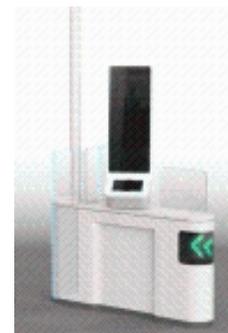
■ Integrated airport management by outsourcing to private sectors for greater efficiency.

Integrated management



■ Introduce advanced technologies to facilitate procedures at airports ~ “FAST TRAVEL” ~

➤ Smooth process by using common check-in kiosks for multiple airlines, self baggage drops, facial recognition gates, etc.

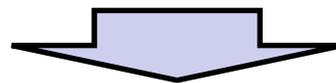


Facial recognition gate



Automatic gate

- Remarkable traffic growth continues between North America and Southeast Asia.
- Moreover, the aviation networks between Southeast Asia and Japan, and between North America and Japan are rapidly growing, partly because of the newly launched inbound tourism promotion by Japan.
- Passengers from the North American region can take advantage of this phenomenal change.
- To accelerate that trend, the Japanese government and Japanese airport operators are working hard to expand airport capacity, and is taking various actions towards more efficient and smoother travel.



**We welcome U.S. tourists coming to Japan for both travel and transit!**

Thank you for your attention.

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