



JAFA Country Report

36th FAPAA Executive Council Meeting

Bangkok

5th Jun ~ 6th Jun 2009

2008 Cargo Trends in Japan

《Export》

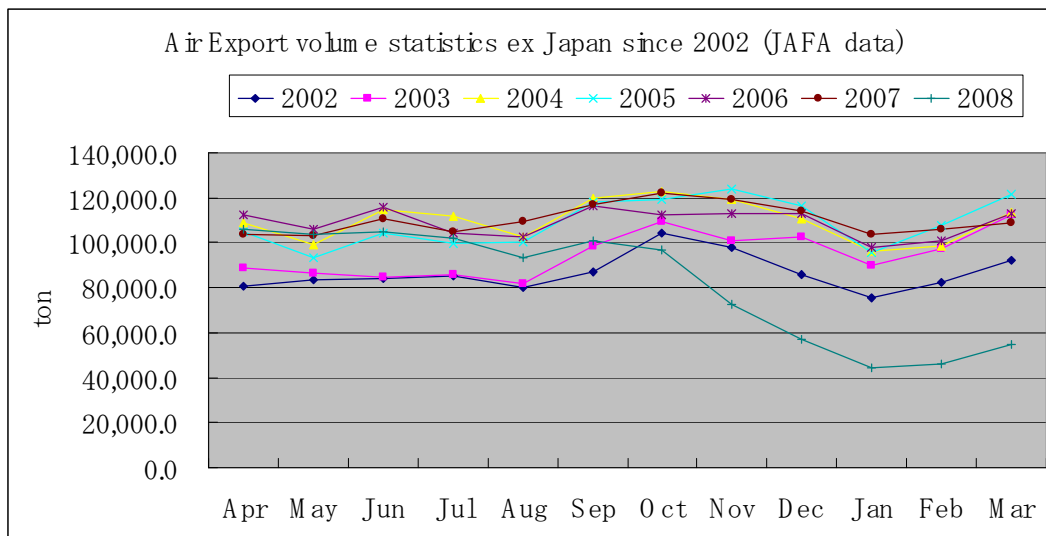
Everybody believed that Air-Cargo market in Japan has been went growth. However since Oct 2008 Air-cargo export volume has been sharply down for all destinations.

Area TC-1,2,3 have recorded very negative figures to 71%~77% against last year, especially volume for Philippines has been down to 60.5% and Taiwan has also down to 64.2%, in case of no of shipments, Korea has worst record down to 76%. Even China is the most biggest export market ex Japan, we could only achieve 77.5% for mainland China and 76.2% for Hong Kong.

Only we could congratulate the lane was Middle East (volume base 101.8%)

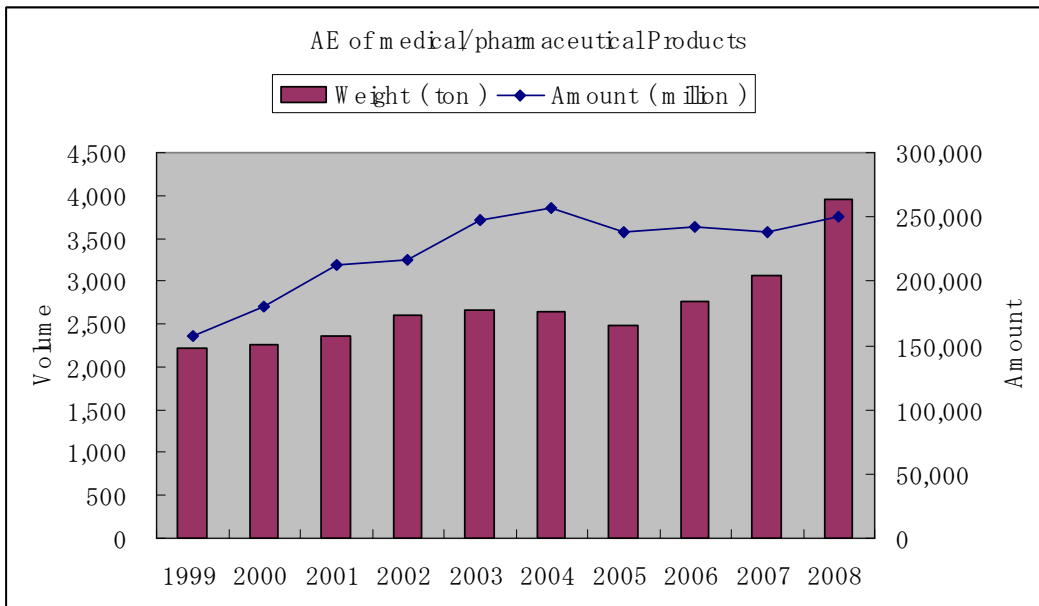
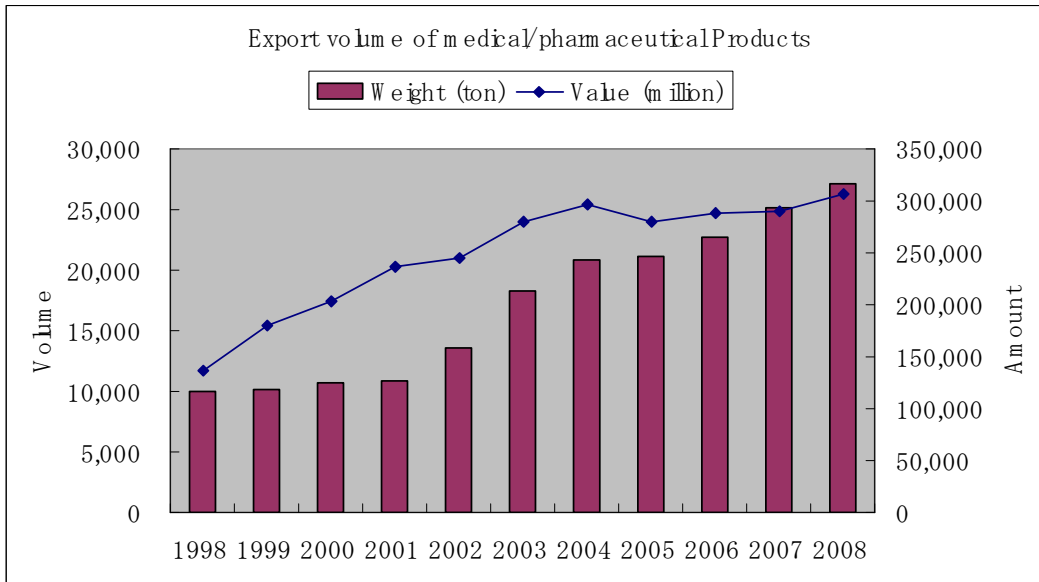
USA has still kept the no 1 position on volume share by countries and its share was 18.4% and secondly China (14.6%), Hong Kong (8.4%), Taiwan (7.5%), and Germany (7.1%). If we combine China and Hong Kong together, then total volume of those 2 destinations would be more than TC-1 or TC-2 total. And we can clearly understood that Japan rely on China market. If we look at our market by commodity Auto-parts or IT equipments have been suddenly stopped to export However one of most active export goods are medical/pharmaceutical products and over 80% of export shipments of those products have been shipped out by air transportation.

As the result, no of shipment has been fell down to 83.9% and volume to 74.3% in 2008, compared with 2007.



2008 Export from Japan (Consolidated Cargo Result) Apr - Mar				
	Shipment	VS LY (%)	Volume (ton)	VS LY (%)
North East	62,078	86.4%	22,074.6	78.7%
Mid West	148,929	81.9%	62,989.2	69.6%
South	88,167	81.7%	32,716.2	69.6%
West	177,972	80.3%	63,570.0	66.9%
Canada	33,282	89.7%	7,984.5	76.5%
Mexico	13,733	83.7%	7,005.2	85.8%
Other America	52,390	98.4%	16,198.6	94.3%
TC-1 Total	576,551	83.5%	212,538.3	71.7%
France	43,065	85.7%	14,975.0	70.9%
Germany	168,741	86.2%	70,044.4	80.2%
United Kingdom	66,170	82.5%	20,961.1	70.4%
Italy	28,532	86.4%	10,299.0	67.2%
Benelux	102,339	92.0%	53,463.7	79.3%
Northern Europe	27,805	83.2%	7,085.7	77.1%
Other Europe	87,828	79.8%	28,093.1	67.5%
Middle East	33,394	99.5%	10,320.1	101.8%

Africa	14,847	87.5%	4,151.1	75.7%
TC-2 Total	572,721	86.2%	219,393.2	76.5%
Australia	41,258	90.1%	11,265.8	68.2%
New Zealand	10,020	87.4%	2,107.0	81.1%
Hong Kong	341,518	82.7%	83,093.0	76.2%
Philippines	73,575	80.5%	15,505.9	60.5%
Singapore	166,905	86.9%	42,236.9	82.1%
Malaysia	100,129	83.7%	25,451.0	76.4%
Thailand	226,576	82.0%	45,597.5	77.5%
Korea	304,585	76.9%	68,344.7	70.2%
Taiwan	238,789	80.4%	74,023.5	64.2%
India	60,037	99.0%	16,813.3	98.1%
Indonesia	44,348	87.9%	11,598.8	79.5%
China	572,572	85.2%	143,672.1	77.5%
Other Asia	58,156	100.7%	11,013.1	96.3%
TC-3 Total	2,238,468	83.4%	550,723	74.5%
G.Total	3,387,740	83.9%	982,654	74.3%



AE share	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Weight	21.9%	21.1%	21.7%	19.1%	14.6%	12.7%	11.7%	12.1%	12.2%	14.6%
Amount	87.8%	88.7%	89.7%	88.8%	88.0%	86.6%	84.9%	83.8%	82.1%	81.5%

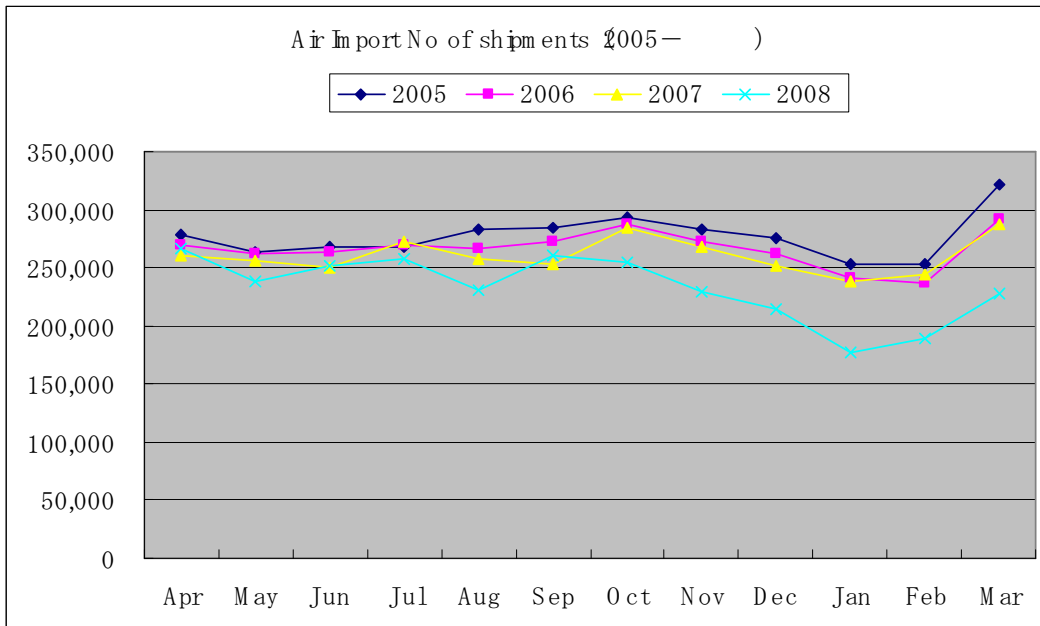
《Import》

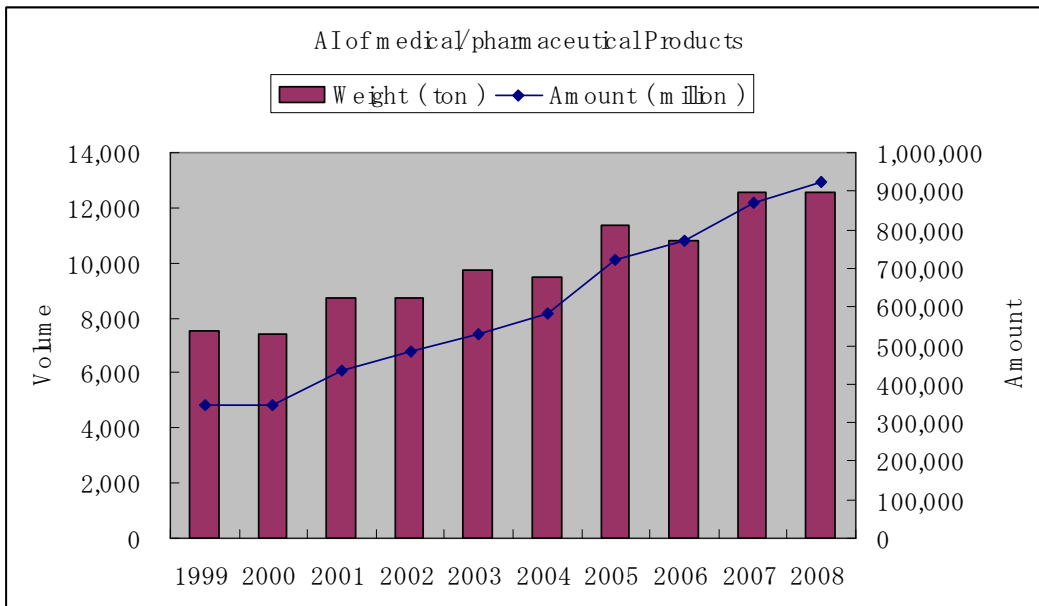
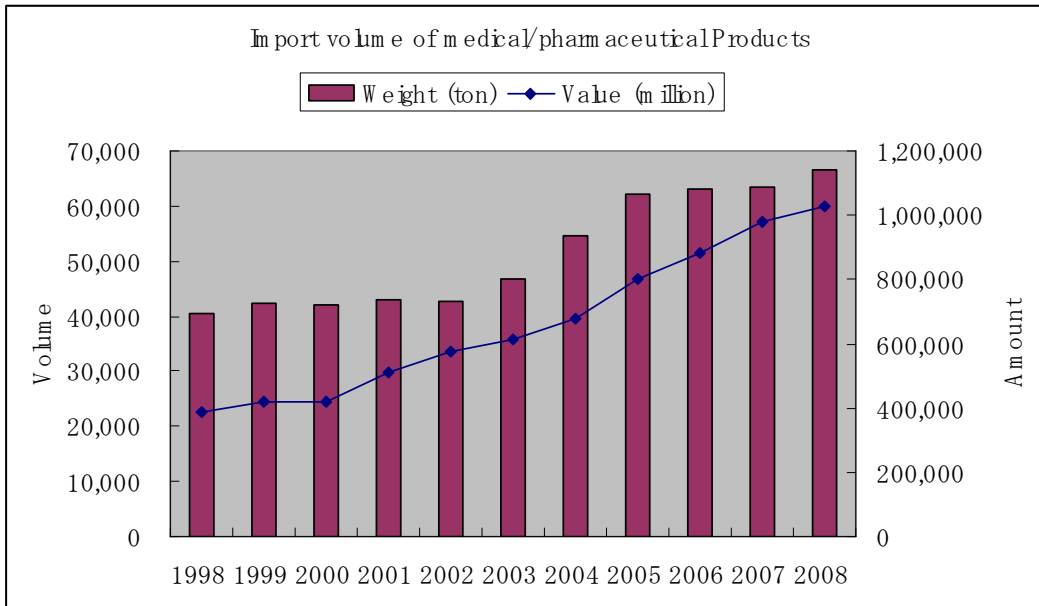
Compared to Export volume, import has not fell down sharply, however the chart below shows warning signal on Aug 2008.

Same as export, there is no big influence on medical/pharmaceutical products and its annual growth %, compared with 2002 was more than double and total import trade amount has reached to 1,030 billion JPY in 2008. It was new record.

High value products have been mainly exported from USA, Germany, Swiss, England and France and however volume base over 41% of products have been imported from China. Perhaps this caused by Japanese high age society structure.

As the result under no of shipments base, 89.5% and volume base 85.5% against last year result.





AI share	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Weight	17.8%	17.6%	20.3%	20.4%	20.8%	17.4%	18.3%	17.1%	19.8%	18.8%
Amount	82.1%	82.3%	85.2%	84.2%	86.7%	86.5%	89.9%	87.4%	88.9%	89.8%

Remarks : Data source Japan customs URL

H.S. code of above data 3001 - 3006

● JAJA's 3 major activities

I、 Safety & Security

- Education & Training on Air-cargo Security
(General Affair Division Security committee)
After training, all attendance had taken examination by
MITI and 95.2% attendance had been passed.
Total candidates : 1,508

II、 Education & Training

- IATA/FIATA Education & Training
(International Cargo Division Education & Training
committee)
2008 Apr Session = 4 6 days
2008 DGR Jun Session = 8 days
2008 Oct Session = 4 1 days
2009 DGR Feb Seminar = 9 days
Total 1 0 4 days
Total examines :3,176,
Total successful candidates : 1,992
- ② New Employees Air Cargo Training
(International Cargo Division Education & Training
committee)
Total candidates : 541
- ③ Dangerous Goods Awareness Course for shipper with 2
different levels (person in charge for handling and
management)
(JAJA/ICAJ research Group Working committees for
DGR handling)
Total candidates : 163

III、 Trade facilitation

- ① Campaign against social ills
(organized by JAJA & Fukuoka airport customs)
- ② AEO Seminar
(General Affair Div, Customs Clearance committee &

International Cargo Div)

- ③ **Seminar for Haneda Airport & its internationalization“
(General Affair Div, General Affairs & Finance
Committee)**
- ④ **Campaign for DGR handling for domestics Air Cargo “
“ Stop to handle DGR, which have not been declared as
DGR cargo “
(Domestic Cargo Div)**
- ⑤ **Air-NACCS up-dated**
- ⑥ **Narita International Airport & Haneda International
Airport**

**MITI has set Logistic strategy committee for coming
2010 era and held kick-off meeting on 2008 Sep 26th.**

**At 4th meeting on 2009 March 23rd, final report on
Narita/Haneda logistics facilitation has been reported
as bellows.**

- (a) Counter measures for bottle-neck between Narita &
Haneda airport and expansion of facilities at both
airport.**
- (b) Through improvement of access to both airport,
logistics optimization should be researched.**

For example,

Narita International airport

- ① **Improve facilities for International cargo handling
in airport area.**
- ② **Solution of bottle-neck in airport area**
- ③ **Improve cargo flow through airport gate by system.**
- ④ **Improve access to airport**

Haneda New international airport

- Improve facilities for International cargo handling in
airport area.**
- Improve cargo flow through airport gate by system.**
- Strengthen logistics facilities around airport area.**
- Improve access to airport**