

Japan Air Freight Market Assessment, By Service [Freight Forwarding, Airlines, Mail, Others], By Destination [Domestic, International], By Carrier Type [Belly Cargo, Freighter], By End-use [Private, Commercial, Institutional], By Region, Opportunities and Forecast, FY2018-FY2032F

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Report description:

Japan air freight market is projected to witness a CAGR of 7.88% during the forecast period FY2025-FY2032, growing from USD 15.71 billion in FY2024 to USD 28.82 billion in FY2032.

Japan air freight market is thriving owing to multiple factors that enhance demand and capacity. Strategically, Japan's location has placed it at the center of international trade in the Asia-Pacific. E-commerce has increased the demand for fast and reliable logistics services as consumers want faster delivery times for goods, especially high-value and time-sensitive items. Industries such as automotive, electronics, and pharmaceuticals with specific handling requirements and speedy transport rely on air freight to support supply chains. Technological advancements in Japan's logistics and digital technologies, such as AI and IoT integrated into operations, have streamlined the entire process, efficiency, and traceability, while trade agreements such as the Regional Comprehensive Economic Partnership have made cross-border transportation smoother. The export of fresh produce and perishable goods further supports this growth. With challenges such as growing fuel prices and ecological concerns, Japan's move towards sustainable aviation fuels and more environment-friendly technology further boosts confidence in the aviation industry. This has enabled Japan to become one of the big-league players in the world air cargo sector, ensuring consistent market growth. In December 2024, Qatar Airways Cargo and Japan Airlines signed a Memorandum of Understanding to strengthen their partnership and enhance cargo services. The agreement aims to improve network connectivity and operational synergies, benefiting customers with improved access and expanded destinations. The partnership seeks to increase trade flows and cargo volumes by connecting the two networks and streamlining logistics operations through their respective hubs in Doha and Tokyo. The collaboration is expected to improve efficiency, reliability, and quality of service, contributing significantly to the growth of Japan's air transport market.

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E-commerce Expansion Fuels Japan Air Freight Market Growth

The expansion of e-commerce is a key driver of growth in Japan's air freight market, as online shopping has augmented demand for fast and reliable delivery services. Consumers now expect fast delivery of their purchases, especially high-value or time-sensitive items for which air transport is the best fit. The electronic commercial platform has optimized the operation of supply chains, combined with the technical results in the logistics field. This allows companies to provide delivery options the next day or the same day. In addition, the global range of retail sellers in Japan's electronic commerce is increasing, which requires efficient cross-logistics, enhancing the use of air cargo. By meeting these needs, the aviation sector plays a key role in ensuring customer satisfaction, thereby increasing its relevance in Japan's rapidly evolving e-commerce ecosystem.

In August 2024, Yamato Holdings, Japan Airlines, and Spring Japan launched dedicated cargo aircraft services between Tokyo's Haneda Airport and Sapporo's New Chitose Airport and Kitakyushu Airport, making Haneda the fifth airport served by these freighters. This expansion strengthens Japan's exclusive domestic cargo services, enhancing rapid and unified transportation. By improving connectivity and logistics efficiency, the new services support the growth of Japan's air freight market, meeting increasing demands and boosting economic activity.

Technological Advancements Drive the Air Freight Market Growth

Technological advancements are driving the growth of Japan's air freight market by improving operational efficiency, reliability, and customer satisfaction. Innovations such as artificial intelligence, robotic process automation, and real-time tracking systems streamline logistics processes, reduce delays, and optimize delivery times. Analytics, and controlled AI ensure accurate forecasting of demand and optimization of routes, increasing the efficiency of costs for carriers. Automation in the processing of goods minimizes human errors and accelerates operations while tracking in real-time provides customers and enterprises with transparency, strengthening confidence and trust in air freight services.

The introduction of green technologies such as fuel-efficient aircraft and sustainable packaging is in line with environmental goals and attracts environmentally conscious customers. These technological improvements have enabled Japan's air freight industry to efficiently handle growing cargo volumes, meet the growing demand for e-commerce, and remain competitive in the global logistics market.

In December 2023, DHL Express and Japan Airlines strengthened their partnership through a long-term contract to use Boeing 767-300 cargo aircraft, aiming to capture growing international cargo demand. By establishing new routes connecting Japan to Seoul, Shanghai, and Taipei, they will enhance their network's stability and sustainability. This partnership supports the expanding international express and e-commerce market in East Asia, driving growth in Japan's air freight market through improved infrastructure, flexible response to shipment demand, and a stable air cargo network for businesses and consumers.

Freight Transport Dominates Japan Air Freight Market

The freight transport segment dominates Japan air freight market with effective logistics solutions, extensive global networks, and the ability to optimize the operation of supply chains. The company in this segment uses advanced technology to optimize routes, reduce transportation time, secure economically efficient transportation, and meet the economic requirements of Japan. Their expertise in handling complex paperwork, customs clearance, and international trade compliance makes them invaluable to companies that rely on air cargo. In addition, the segment's focus on customer-centric services, including real-time tracking and customized delivery solutions, positions it as a key growth driver in Japan air freight industry.

In June 2024, Nippon Express launched the "Ohio Midnight Express" air cargo service between Nagoya, Japan and Cincinnati, offering same-day delivery within Ohio and faster service compared to traditional routes. This new service supports the growing automotive industry in the Midwest, driven by manufacturing investments from companies such as Ford and Intel. By improving logistics efficiency and meeting high demand, this route will contribute to the growth of Japan air freight market and enhance its role in the global supply chain.

Central Japan Dominates Air Freight Market Share

The Central region, especially in Tokyo, commands a significant amount of the air freight market as it occupies an important central hub for air freight, domestic or international since most goods passing through East Asia must be cleared between North America and Europe. Tokyo is advanced in its infrastructure, from the Narita International Airport and the Haneda Airport, so its cargo volume handling is seamless. Being the economic powerhouse of Japan, Tokyo is home to many businesses and manufacturing plants. Consequently, the demand for air freight services intensifies, and the fast growth of e-commerce further

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fuels the demand for quick and reliable delivery services. The government's support through regional trade agreements and favorable policies also helps the operational domain of businesses in the Central region.

For example, several major logistics players have established their operations in Central Japan, particularly in Tokyo. Nippon Express has developed a significant air freight hub in the city, utilizing Narita International Airport as a key gateway for international shipments, which facilitates the efficient movement of goods to and from major global markets. Similarly, Kintetsu World Express maintains a strong presence in the region, with its headquarters in Osaka and operations extending to Tokyo, allowing it to effectively serve both domestic and international clients. Additionally, Japan Airlines (JAL) operates dedicated cargo services through an extensive network that positions Tokyo as a central hub for air freight, further underscoring the region's strategic importance in logistics.

Future Market Scenario (FY2025 – FY2032F)

- The demand for air freight will keep rising as e-commerce continues to expand, requiring fast and reliable delivery of goods.
- Innovations in AI, IoT, and blockchain will enhance efficiency, security, and transparency in air freight logistics.
- Increased investment in eco-friendly aircraft and greener practices will drive the adoption of sustainable air freight solutions.
- Changes in trade policies, tariffs, and geopolitical tensions will impact air freight routes and demand.

Key Players Landscape and Outlook

The competitive landscape for the Japan air freight market presents several key points that shape how to operate and competitively position any company. Service quality is the high point of delivering reliable and fast air freight, especially for high-value and perishables. Technological advancements have also played an important role; firms are adopting innovations such as artificial intelligence to optimize routes, the Internet of Things (IoT) to track shipments in real-time, and blockchain technology to increase the transparency of their operations. Green practices are becoming more popular too, with firms investing in aircraft that are more fuel efficient and alternative fuels to meet ever-increasing regulatory demands and consumer expectations for environmentally friendly logistics solutions. Strategic alliances are also very important in this competitive environment and allow companies to create a more integrated and responsive air freight network by partnering with airlines, logistics providers, and e-commerce platforms. Cost efficiency is also important because businesses strive to provide the most competitive price while ensuring high service quality. Altogether, Japan's air freight market is increasingly moving ahead, shaped by these competitive dynamics that have to do with increased demand for prompt and effective solutions in logistics services.

In August 2024, Yusen Logistics was selected for projects to promote the Tokyo government of the capital government, aiming to reduce greenhouse emissions from air cargo using sustainable air fuel (SAF). Yusen Logistics will increase the demand and use of SAF, maintain environmental goals, and achieve pure zero by 2050, reducing 45% by 2030. This initiative will help improve sustainable air transport practices, achieve Tokyo's environmental goals, and contribute to the growth and greening of the Japan air freight market.

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*Companies mentioned above DO NOT hold any order as per market share and can be changed as per information available during research work.

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