

Japan Aviation Market Assessment, By Aircraft Type [Commercial Aircraft, General Aviation, Military Aircraft, Helicopter, Electric and Hybrid Aircraft], By Service Type [Passenger Transport, Cargo Services, Leasing Services, Maintenance, Repair, Overhaul, Aviation Consultancy], By End-user [Airlines, Military and Defense, Corporate Sector, Private Individuals, Air Cargo Operators, Airport Operators], By Region, Opportunities and Forecast, 2018-2032F

Market Report | 2025-02-19 | 129 pages | Market Xcel - Markets and Data

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Report description:

Japan aviation market is projected to witness a CAGR of 3.68% during the forecast period 2025-2032, growing from USD 14.17 billion in 2024 to USD 18.92 billion in 2032. The market has experienced significant growth in recent years and is expected to maintain a strong pace of expansion in the coming years.

The aviation market is crucial to Japan's economic stability. Japan asserts good infrastructure with a well-organized network of airports to provide domestic and international travel facilitated through notable hubs such as Tokyo's Narita International Airport and Tokyo International Airport (Haneda Airport). Several Japanese airlines are known for delivering excellent service and operational efficiency standards.

The aviation industry has undergone many significant changes over the past decades, mainly utilizing the evolution in consumer preferences and technological advancement. The growing emphasis is on sustainability, with airlines becoming ever more inclined toward green approaches to reducing carbon footprints. Digitization of aircraft and technological aspects shape the passenger experience with applications and simplified check-in mechanisms that increase convenience. When international travel resumed after a prolonged disruption from the global virus, COVID-19, it started gaining pace again, so there was an upward drive within the competition level of airlines. With the shifting nature of the economy and rising operation costs, the Japanese aviation market

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offers several expansion opportunities. Among these is the fast-expanding e-commerce industry's increased need for air freight, which is an opportunity that airlines would welcome. As Japan continues to evolve through these changes, its aviation industry is still well-positioned for continued growth and development, blending old strengths with new approaches to meet the needs of travelers and businesses alike. This dynamic landscape underscores Japan's commitment to maintaining its status as a prominent competitor in global aviation.

For instance, in September 2024, Japan Airlines Co., Ltd., together with Yamato Holdings Co., Ltd., and Spring Airlines Co., Ltd., launched new cargo aircraft services between Tokyo's Haneda Airport, Sapporo's New Chitose Airport, and Kitakyushu Airport. The services run during late-night hours to ensure fresh product distribution without conflicting with passenger flights. The new service is designed to expand the trade areas and support regional industries through rapid and efficient transportation.

Expansion of the Air-Passenger Traffic Drives the Japan Aviation Market Demand

Air passenger traffic has been demonstrated to be the primary demand driver for Japan's aviation market. Since the country remains confrontational from the pandemic's repercussions, the demand for domestic and international traveling seems to be recovering. This is due to increasing disposable incomes, altered consumer preferences, and the rising tourism industry, which increases air travel. Japan's strategic position within the Asia-Pacific region, coupled with its attraction as a destination, boosts the need for passengers. In response to the growth, airlines are increasing their route networks and enhancing service offerings that respond to the growing number of travelers and improve connectivity overall. Moreover, technology is transforming the passenger experience, making air travel more efficient and accessible. The Japanese aviation market is poised to grow sustainably with continued expansion in air passenger traffic.

For instance, in March 2024, Japan Airlines Co., Ltd. (JAL) announced plans to introduce 42 new aircrafts from Airbus SAS and the Boeing Company as part of its fleet renewal plan. The fleet renewal plan includes 21 Airbus A350-900, 11 A321neo, and 10 Boeing 787-9 aircraft. JAL expanded its international network, especially in North America, Asia, and India, and enhanced fuel efficiency in order to meet the requirements of CO2 emission reduction. Further, JAL plans to introduce 21 Boeing 737-8 aircraft for regional routes, starting from 2026, and 11 Airbus A321neo aircraft for high passenger traffic routes, starting from 2028.

Advances in Military Aviation Due to Geopolitical Tension Propels the Japan Aviation Market Growth □

The growth of the Japanese aviation market is predominantly due to military applications. There is pressure for improvement and modernization of its defense systems. Along with high budgets to invest in state-of-the-art military aviation technologies like the next-generation fighter jet and missile systems will remain imperative to national security and deterrence. The Japanese government meets these challenges by upgrading its mobilizations and increasing its defense budget. While Japan seeks to strengthen its forces for its nation's self-defense, this move also strengthens its international cooperation by approaching leading-edge military technology development like outsourcing and partnering with other countries to develop new technologies. Enhanced innovation coupled with various technological advancements in military aviation will likely spur further growth in the wider aviation sector through increased production and research from defense contractors and manufacturers. Japan's commitment to improving its air defense capability further develops the regional security architecture, encouraging partnerships with allies. Such collaboration not only improves Japan's military attentiveness but also makes the country vital in dynamic geopolitics, thereby driving growth.

For instance, in September 2024, Japan Air Self-Defense Force (JASDF) announced plans to order nine Boeing KC-46A Pegasus tanker aircraft for around USD 4.1 billion. The military order would improve Japan's aerial refueling and military personnel transport capacity. The new tankers will help the Japan Air Self-Defense Force (JASDF) maintain air operations across Japan and in the Pacific. In addition, the package includes extra engines, radar warning receivers, and infrared countermeasure systems.

Commercial Aircraft Dominates the Japan Aviation Market Share

The commercial aviation segment is the most significant market in Japan. This segment includes passenger and cargo services crucial in domestic and international connectivity. Air travel has seen a resurgence after the pandemic, and this has driven the growth of commercial aviation because airlines are adapting to changing consumer needs and operational challenges. The technological and sustainability thrusts are changing the landscape. Airlines are gradually investing in modern aircraft that increase efficiency and reduce environmental impact. The competitive environment is dominated by several companies with ongoing improvements in service offerings and network expansions. With Japan's evolving economy, commercial aviation will continue to play a crucial role in fostering economic growth and strengthening connectivity within the global space. It will also

continue to have a foothold in Asia-Pacific's new aviation landscape.

For instance, in July 2024, All Nippon Airways Co. Ltd. (ANA) announced plans to begin new non-stop flights between Tokyo International Airport (Haneda) and Milan from December 2024 to Stockholm in January 2025, and to Istanbul in February 2025. This development meets the growing demand for traveling to and from Japan, fostering greater bilateral exchanges with the respective countries. For this purpose, Stockholm became the first scheduled flight destination for a Japanese airline. ANA is continuing its expansion of the international network to further strengthen its position as a prominent network carrier between Japan and Europe.

Central Japan is Expected to Dominate the Japan Aviation Market Size

The central region, which comprises Kanto and Chubu, is considered to dominate the Japanese aviation market. This region hosts one of the country's great metropolitan centers, Tokyo, which is a critical gateway for domestic and international air travel. The concentration of economic activity and a dense population contribute to a high demand for air services. The extensive airport infrastructure in the Kanto region includes Narita International Airport and Tokyo International Airport (Haneda Airport), offering a wide range of flight options and enhancing connectivity. The Chubu region complements this with an essential link for travelers in the center of Japan with the Nagoya Airport. Technological advancements and sustainability initiatives will make the Central region more dominant in the aviation sector. As the demand for air travel continues to rise, the central region will play a key role in the future of Japan's aviation market.

For instance, in June 2024, Narita International Airport unveiled expansion plans that include increasing its capacity and efficiency. The project will construct a new runway, extend existing runways, and consolidate terminals into one facility. Its expansion will increase the airport's annual capacity from 57 million to 75 million passengers and accommodate 500,000 runway movements annually. The entire project is expected to be completed in the 2040s.

Future Market Scenario (2025-2032F)

- The Japanese aviation sector can only expect investments to increase as airlines continue to add to growing passenger demand. Japanese airlines will continue increasing their investments, aiming to add to the fleet and modernize to meet passenger demand.
- Improvements in local connectivity will spur growth in neglected regions and improve airline access to a broader array of destinations.
- Technological developments in aircraft design and operation are expected to advance fuel efficiency and reduce environmental impact, following global sustainability trends.

Key Players Landscape and Outlook

The Japan aviation market is highly competitive, with significant participants across the globe, including some local companies. Airbus SAS and the Boeing Company are global companies with market leadership in commercial aircraft; they keep advancing through innovative technology. Regionally, the companies include Kawasaki Heavy Industries, which specializes in engineering for military and civilian applications. Looking forward, the prospects for the Japanese aviation market are promising. The factors driving growth are strong air travel demand and modernization. With this, many of these key players will be better placed to take hold of opportunities while ensuring challenges within the emerging aviation landscape.

For example, in November 2024, Qatar Airways Cargo (Qatar Airways Company Q.C.S.C) signed a Memorandum of Understanding (MoU) with Japan Airlines Co., Ltd to strengthen their partnership for cargo services. The agreement allows for the integration of networks through hubs in Doha and Tokyo, enhancing connectivity and offering better products to customers. The partnership will expand next year as Qatar Airways Cargo will start freighter services between Hamad International Airport and Tokyo Narita Airport. The collaboration is to create immense economic value by improving the trade flows between the regions covered by both airlines.

Table of Contents:

- 1.□Project Scope and Definitions
- 2.□Research Methodology
- 3.□Executive Summary
- 4.□Voice of Customer
- 4.1.□Product and Market Intelligence

- 4.2.□Brand Awareness
- 4.3.□Factors Considered in Purchase Decisions
 - 4.3.1.□Purpose
 - 4.3.2.□Financials
 - 4.3.3.□Technology
 - 4.3.4.□Operational Support
 - 4.3.5.□Manufacturer Reputation
 - 4.3.6.□Insurance and Legal
- 4.4.□Consideration of Privacy and Regulations
- 5.□Japan Aviation Market Outlook, 2018-2032F
 - 5.1.□Market Size Analysis & Forecast
 - 5.1.1.□By Value
 - 5.2.□Market Share Analysis & Forecast
 - 5.2.1.□By Aircraft Type
 - 5.2.1.1.□Commercial Aircraft
 - 5.2.1.2.□General Aviation
 - 5.2.1.3.□Military Aircraft
 - 5.2.1.4.□Helicopter
 - 5.2.1.5.□Electric and Hybrid Aircraft
 - 5.2.2.□By Service Type
 - 5.2.2.1.□Passenger Transport
 - 5.2.2.2.□Cargo Services
 - 5.2.2.3.□Leasing Services
 - 5.2.2.4.□Maintenance, Repair, Overhaul (MRO)
 - 5.2.2.5.□Aviation Consultancy
 - 5.2.3.□By End-User
 - 5.2.3.1.□Airlines
 - 5.2.3.2.□Military and Defense
 - 5.2.3.3.□Corporate Sector
 - 5.2.3.4.□Private Individuals
 - 5.2.3.5.□Air Cargo Operators
 - 5.2.3.6.□Airport Operators
 - 5.2.4.□By Region
 - 5.2.4.1.□North
 - 5.2.4.2.□South
 - 5.2.4.3.□Central
 - 5.2.5.□By Company Market Share Analysis (Top 5 Companies and Others - By Value, 2024)
 - 5.3.□Market Map Analysis, 2024
 - 5.3.1.□By Aircraft Type
 - 5.3.2.□By Service Type
 - 5.3.3.□By End-User
 - 5.3.4.□By Region
- 6.□Demand Supply Analysis
- 7.□Import and Export Analysis
- 8.□Value Chain Analysis
- 9.□Porter's Five Forces Analysis
- 10.□PESTLE Analysis

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- 11. □ Pricing Analysis
- 12. □ Market Dynamics
 - 12.1. □ Market Drivers
 - 12.2. □ Market Challenges
- 13. □ Market Trends and Developments
- 14. □ Case Studies
- 15. □ Competitive Landscape
 - 15.1. □ Competition Matrix of Top 5 Market Leaders
 - 15.2. □ SWOT Analysis for Top 5 Players
 - 15.3. □ Key Players Landscape for Top 9 Market Players
 - 15.3.1. □ The Boeing Company
 - 15.3.1.1. □ Company Details
 - 15.3.1.2. □ Key Management Personnel
 - 15.3.1.3. □ Products and Services
 - 15.3.1.4. □ Financials (As Reported)
 - 15.3.1.5. □ Key Market Focus and Geographical Presence
 - 15.3.1.6. □ Recent Developments/Collaborations/Partnerships/Mergers and Acquisitions
 - 15.3.2. □ Airbus SAS
 - 15.3.3. □ Japan Aerospace Corporation
 - 15.3.4. □ Subaru Corporation
 - 15.3.5. □ Avions de Transport Regional GIE (ATR)
 - 15.3.6. □ Kawasaki Heavy Industries, Ltd.
 - 15.3.7. □ Lockheed Martin Corporation
 - 15.3.8. □ Embraer S.A.
 - 15.3.9. □ De Havilland Aircraft of Canada Limited
 - 15.3.10. □ Textron Inc.
- *Companies mentioned above DO NOT hold any order per market share and can be changed according to information available during research work.
- 16. □ Strategic Recommendations
- 17. □ About Us and Disclaimer

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