

Japan Freight and Logistics - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Japan Freight and Logistics Market size is estimated at 335.8 billion USD in 2025, and is expected to reach 406.7 billion USD by 2030, growing at a CAGR of 3.90% during the forecast period (2025-2030).

Rising demand for road freight services due to increasing e-commerce sales and structural changes in Japan

- In December 2023, DHL Express and Japan Airlines (JAL) forged a long-term partnership centered around JAL's Boeing 767-300 freighters. This collaboration aims to tap into the surging demand in the international express and e-commerce shipping sectors, particularly in East Asia. By teaming up with DHL, JAL is bolstering its efforts to establish key connections between Japan, Seoul, Shanghai, and Taipei, leveraging the Boeing 767-300ER freighters. Notably, DHL plans to expand its intra-East Asia network by leveraging the routes introduced by JAL starting in February 2024.
- In October 2023, Japan's government unveiled its intention to allocate JPY 30.6 billion (USD 216.89 million) toward electric aircraft systems, initiating research and development activities in 2024. This decision aligns with global efforts to push aviation operators and governments toward achieving carbon neutrality by 2050. The government plans to allocate JPY 17.3 billion (USD 122.62 million) toward hydrogen fuel cell system development for aircraft and JPY 13.3 billion (USD 94.27 million) for the enhancement of fuel-efficient engine control systems.

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With growing demand for home deliveries & labour shortages, the MILT is focusing on construction of automatic cargo transport roads and logistics tunnels

- On May 17, 2024, a fair at Tokyo Station highlighted the growing use of high-speed passenger trains for light freight. This shift, driven by a shortage of commercial drivers and new overtime laws, has increased road delivery costs by up to 20%. Since August 2023, JR East has been running a same-day delivery service from Niigata to Tokyo using a dedicated 12-car Series E trainset. Items transported include fresh food, confectionery, drinks, flowers, precision components, and medical supplies. In September 2023, JR East launched a freight-only service on the Tohoku Shinkansen and now offers Hakobyun-branded freight services across its high-speed and Limited Express networks.
- In March 2024, Central Japan Railway Co. abandoned its plan to launch a high-speed maglev train between Tokyo and Nagoya by 2027 due to ongoing environmental opposition in Shizuoka Prefecture, possibly delaying the project until 2034 or later. The Linear Chuo Shinkansen aims to connect Tokyo and Osaka with trains reaching speeds of 500 kilometers per hour, but a small section in Shizuoka has been a major obstacle.

Rising prices of fuel in Japan witnessed in July 2024, highest since October 2023, despite government subsidies

- In July 2024, the Agency for Natural Resources and Energy announced that the retail price of regular gasoline reached USD 1.33 per liter, marking an increase of USD 0.006 from June 2024. This price point is the highest observed in nearly nine months, dating back to October 2023. The uptick in retail prices is attributed to surging wholesale prices. To counteract this, the government has been subsidizing oil refiners, ensuring that wholesale prices remain subdued. Moreover, the subsidy amount saw an uptick, rising to USD 0.19 between June 27 and July 3, which is an increase of USD 0.01 from the week prior.
- Japanese gas utilities expect city gas demand to rise in the fiscal year April 2024 to March 2025, following reduced usage in 2023-24 due to unusually warm weather. Tokyo Gas, Japan's largest gas retailer, forecasts city gas sales will increase by 1.1% to 11.422 billion cubic meters by 2025. Household sales are expected to grow by 3.4% to 2.8 billion cubic meters, while supplies to industry and commercial users are projected to rise by 0.3% to 8.6 billion cubic meters.

Japan Freight and Logistics Industry Overview

The Japan Freight and Logistics Market is fragmented, with the major five players in this market being Mitsui O.S.K. Lines, Ltd., Nippon Express Holdings, NYK (Nippon Yusen Kaisha) Line, SG Holdings Co., Ltd. and Yamato Holdings Co., Ltd. (sorted alphabetically).

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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