

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

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Report description:

The Japan Road Freight Transport Market size is estimated at 132.8 billion USD in 2025, and is expected to reach 159.7 billion USD by 2030, growing at a CAGR of 3.75% during the forecast period (2025-2030).

The Japanese manufacturing sector, led by the automobile industry, has propelled the Japanese economy

- The Japanese manufacturing sector has driven the country's economy to the point where it is now the third-largest economy in terms of GDP and is regarded as one of the "Manufacturing Superpowers." Furthermore, Japan exported 4.42 million vehicles in 2023, up 16% from a year earlier, while domestic auto sales totaled nearly 4.78 million vehicles. The growth in exports drove the demand for road freight services.
- The retail and wholesale trade sector is another major contributor to the Japanese economy, with more than a 13.00% share. The segment grew significantly in 2022 due to increased sales in convenience stores. Sales reached a new high of USD 97.10 billion, representing a 3.70% increase over the previous year. The number of shoppers in 2022 rose by 0.6% compared to the previous year. These positive trends indicate a strong recovery of the convenience store industry. Moreover, during 2023-2027, the Japanese e-commerce market is expected to register a CAGR of 9.75%. Over the next few years, online sales are projected to increase seven to ten times faster than retail sales.

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With growing demand for home deliveries & labor shortages, the MLIT 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 Road Freight Transport Industry Overview

The Japan Road Freight Transport Market is fragmented, with the major five players in this market being Fukuyama Transporting Co., Ltd., Hitachi Transport System, K R S Corporation, Mitsui-Soko Holdings Co., Ltd. and Nippon Express Holdings (sorted alphabetically).

Additional Benefits:

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

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