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Japan - Transport and Logistics: Government initiatives to drive growth (Strategy, Performance and Risk Analysis)

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Abstracts

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SUMMARY

Japan is the fifth largest economy in the world; its nominal GDP increased by 10.0%, from US$5,392.5bn in 2016 to US$5,933.2bn in 2017. It is a stable economy with proactive governance and a business environment that supports investments in infrastructure. With regular modernization and expansion measures, the country has developed a well maintained infrastructure. This is partly due to its geographical location as on occasion it is challenged by environmental disasters, which led to the development of its infrastructural technological capabilities and the effective use of its limited natural resources. Business operations with corporate laws based on Japan's Corporate Governance Code are supported by the protection of trademark rights through the Trademark Act, 1959.

MarketLine's Premium industry reports provide a comprehensive overview of the market and include sections on: risk and reward, key industry trends and drivers, SWOT analysis, competitive landscape, innovation, deals, key developments, and industry benchmarking to compare key performance indicators with regional and global markets.

Key highlights

Japanese road transport freight traffic to increase

Regarding road transport, freight traffic in Japan registered a CAGR of -1.7%, from 210.0 billion ton km in 2012 to 192.7 billion ton km in 2017. However, it is anticipated to post a CAGR of 1.0%, from 189.4 billion ton km in 2018 to 197.3 billion ton km in 2022.

GVA from other transportation and support services to increase further

In Japan, other transport support services GVA recorded a CAGR of 9.4%, from US$67.1bn in 2012 to US$105.2bn in 2017. It is expected to post a CAGR of 9.5%, from US$117.8bn in 2018 to US$169.0bn in 2022. Growth in services such as freight forwarding, pick up, delivery and grouping of consignments, goods handling operation, and distribution facilities will drive GVA for other transportation services.

Increasing water transport to drive port container capacity

Port container capacity in Japan recorded a CAGR of 4.3%, from 17.1 million TEUs in 2012 to 21.1 million TEUs in 2017 and is anticipated to post a CAGR of 2.8%, from 22.0 million TEUs in 2018 to reach 24.6 million by 2022. An increase in goods transportation via waterways will drive port container capacity. Total freight carried via waterways recorded a CAGR of 0.3%, from 230.4 billion ton km in 2012 to 234.3 billion ton km in 2017, with expectations for it to post a CAGR of 1.4%, from 237.6 billion ton km in 2018 to reach 251.4 billion ton km by 2022.

SCOPE

Risk & Reward Index: The risk and reward index compares the position of the Japanese transport and logistics industry with other countries in the region in terms of specific risk and reward parameters.

Industry Snapshot and Industry View: Key transport and logistics industry statistics include freight traffic, freight volume, fleet size, passengers, import and exports gross value added, FDI and trends driving market performance.

Industry SWOT Analysis: Discover the strengths, weaknesses, opportunities and threats impacting market performance and investment in Japan's transport and logistics market.

Industry Benchmarking: Benchmark how the Japanese transport and logistics market is performing compared to regional and global markets in terms of GVA,

fleet size and freigth traffic by mode.

Competitive Landscape: Overview of industry players compared with their peers across a set of indicators.

REASONS TO BUY

How is the market performing in terms of indicators such as freight traffic, freight volume, fleet size, passengers, import and export, gross value added and FDI?

How risky is it to invest in the Japanese transport and logistics industry compared to other countries in Asia-Pacific?

What is driving the performance of key industry segments such as land, air, water and rail?

Who are the leading players in the Japanese transport and logistics industry and their presence in respective segment?

What trends are being witnessed within the Japanese transport and logistics industry?

What are the Japanese transport and logistics industry's strengths and weaknesses and what opportunities and threats does it face?

What are the recent developments and innovations in the Japanese transport and logistics industry?

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