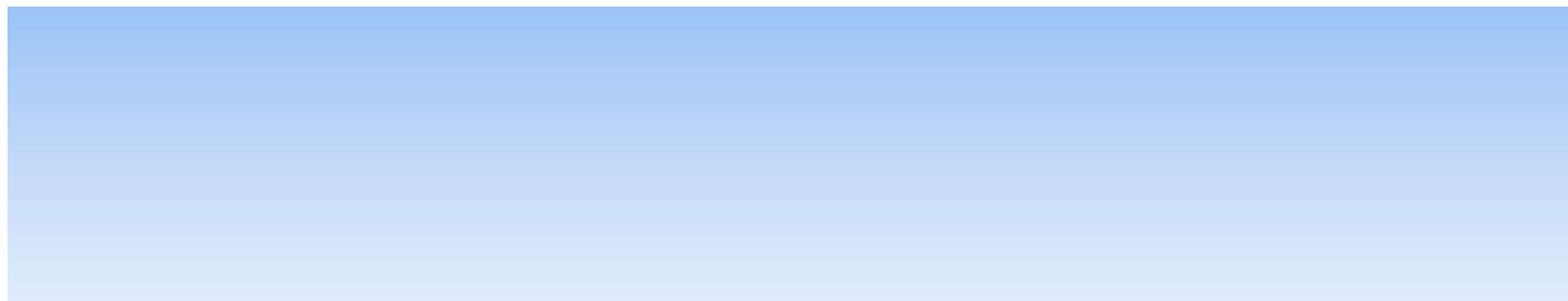


*Session 3: Project in Focus – Evolution of Regional Value Chains  
and Logistics Networks in Greater Tumen Region (GTR)*

**Views from Japan**

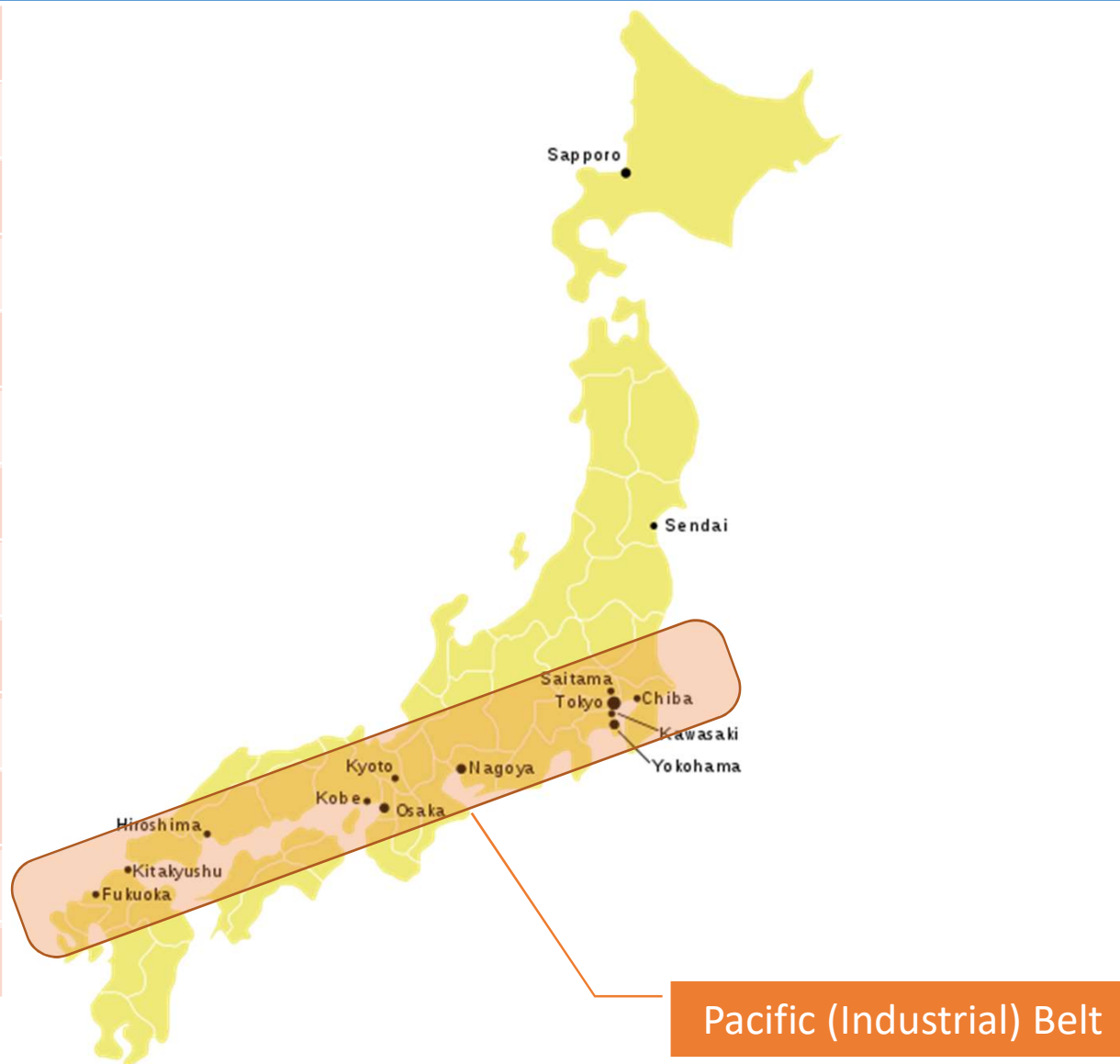
*Hirofumi Arai, ERINA*

# 1. Main Directions in Japan



# The Most Populated Cities in Japan

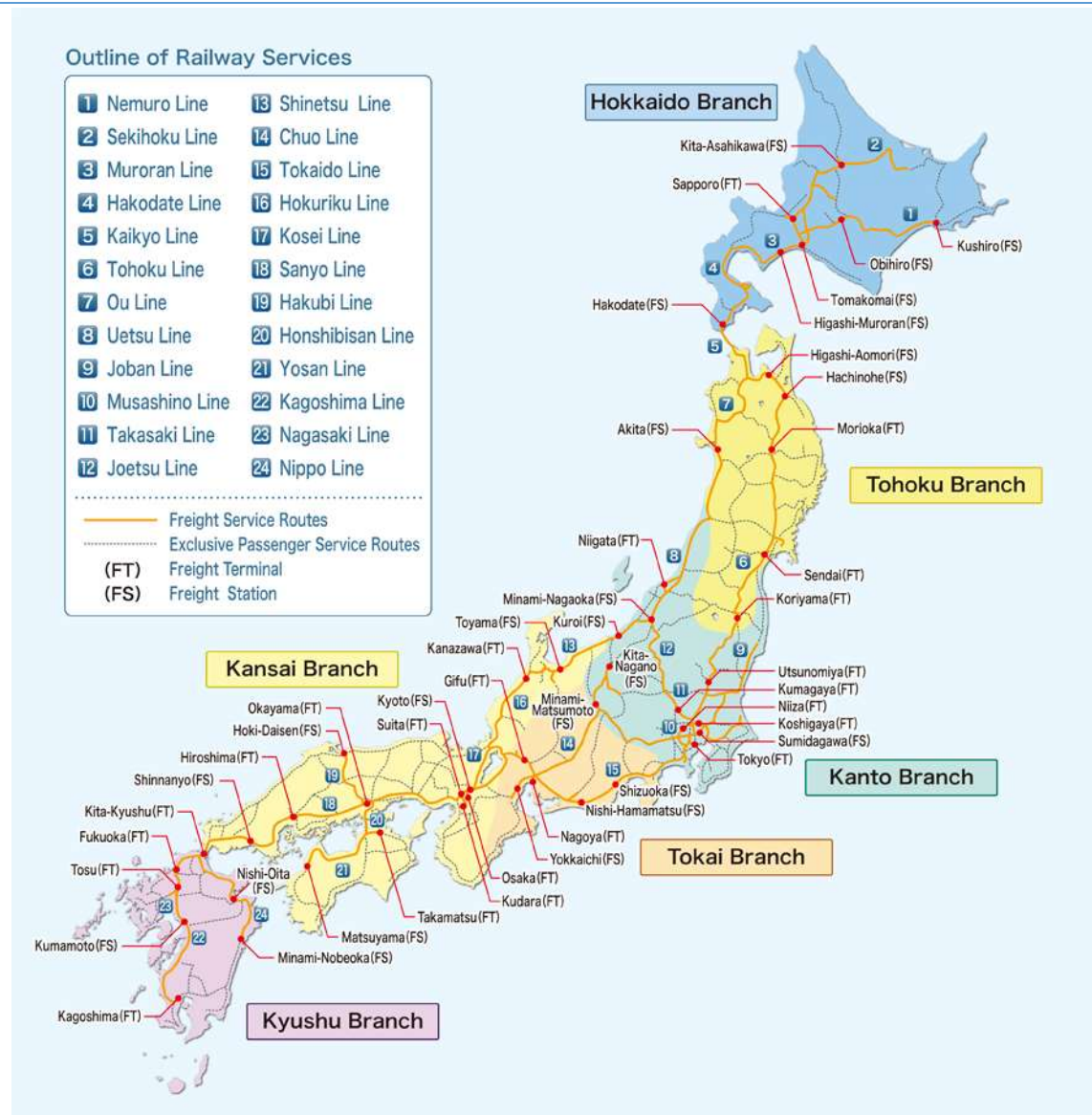
Tokyo	8,336,599
Yokohama	3,574,443
Osaka	2,592,413
Nagoya	2,191,279
Sapporo	1,883,027
Kobe	1,528,478
Kyoto	1,459,640
Fukuoka	1,392,289
Kawasaki	1,306,785
Saitama	1,193,350
Hiroshima	1,143,841
Yono	1,077,730
Sendai	1,063,103



# Overall Railway Network (Passenger)



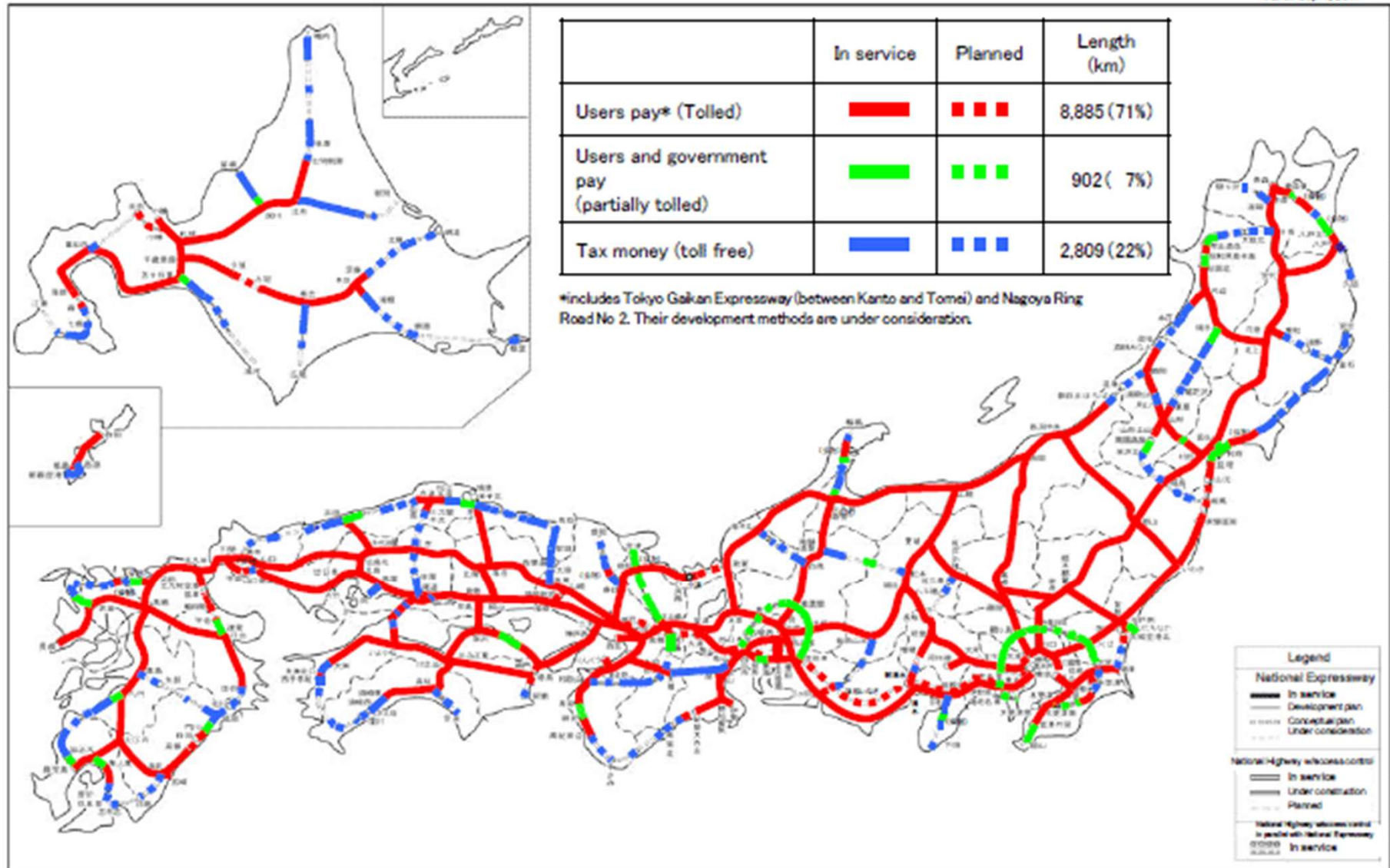
# JR Freight Service Line



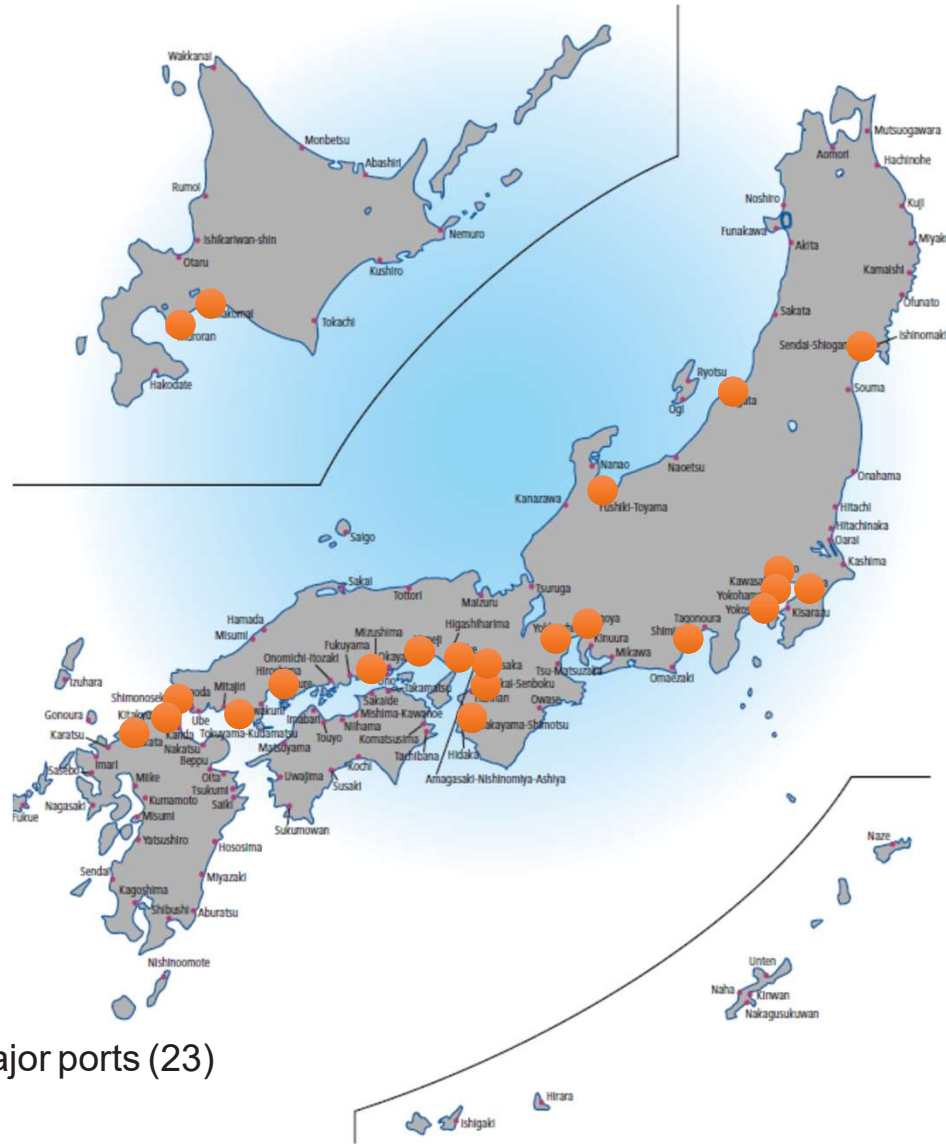


# Highway Network

As of Sep 1, 2011



# Major Ports in Japan



- Specially designated major ports (23)
- Major ports (105)

# Policy attentions to Pacific major ports

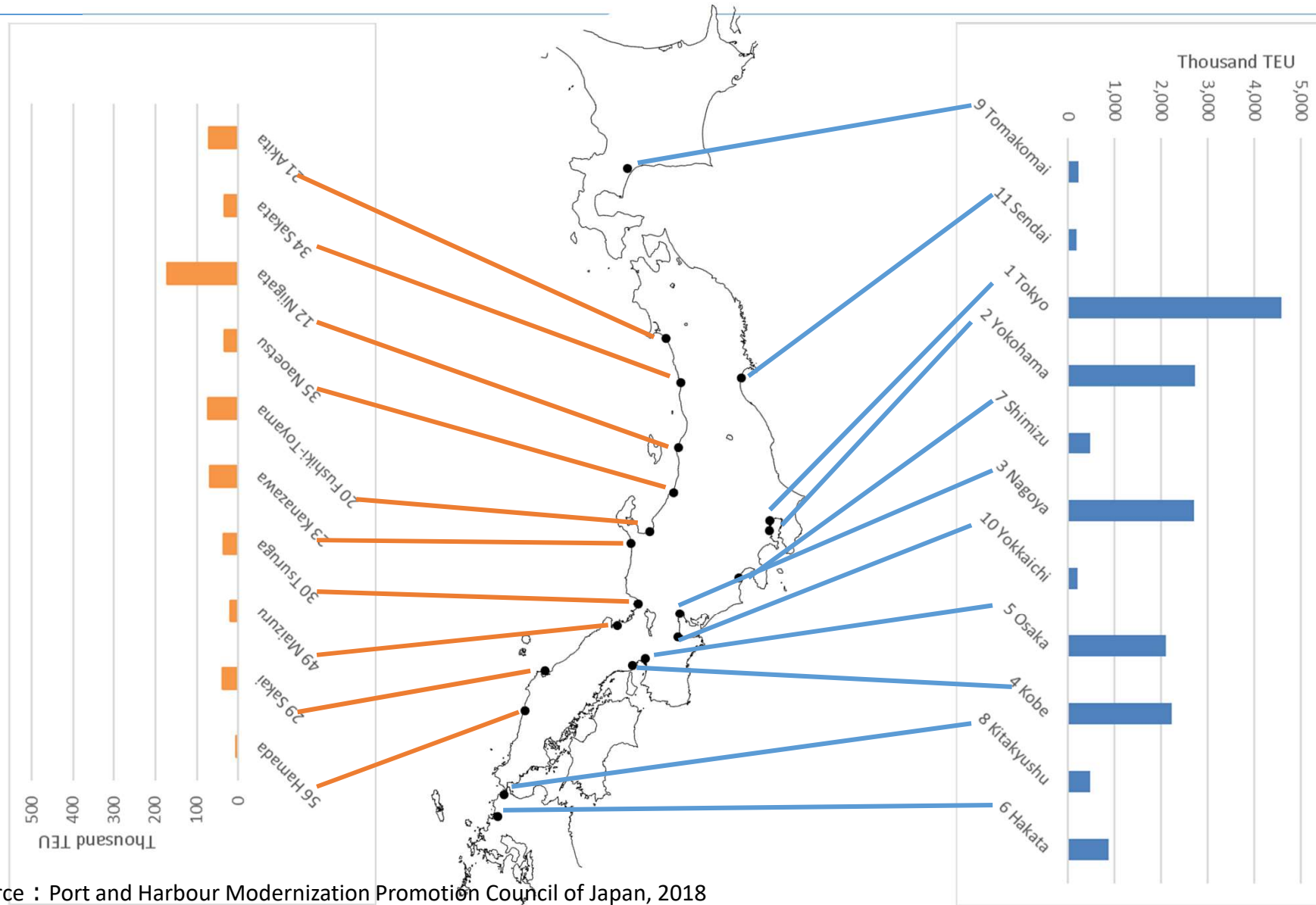
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## “Super-hub Port” Initiative from 2004

- Applied to:
  - 1) Keihin Port (Alliances of Port of Tokyo and Port of Yokohama)
  - 2) Alliances of Port of Nagoya and Port of Yokkaichi
  - 3) Hanshin Port (Alliances of Port of Kobe and Port of Osaka)
- Measures:
  - 1) Formulation of “Mega - Container Terminals”
    - To reduce handling costs through economies of scale, a “Super-hub Port” should have “Mega Container Terminals” to enable integrated and flexible terminal operation.
  - 2) Encouraging consolidation of terminal operators
    - Encouraging private operators to participate in the terminal business through financing supports and long-term lease arrangements of public assets (public wharf)
  - 3) Introduction of cutting-edge IT
    - Introduction of cutting-edge IT system and fully automated cargo handling equipment to enable 24 hours operation
  - 4) Improve connection with domestic feeder services
    - Promote the development of domestic feeder services to increase the domestic feeder cargo



# Pacific Coast Prevails in Container Handling

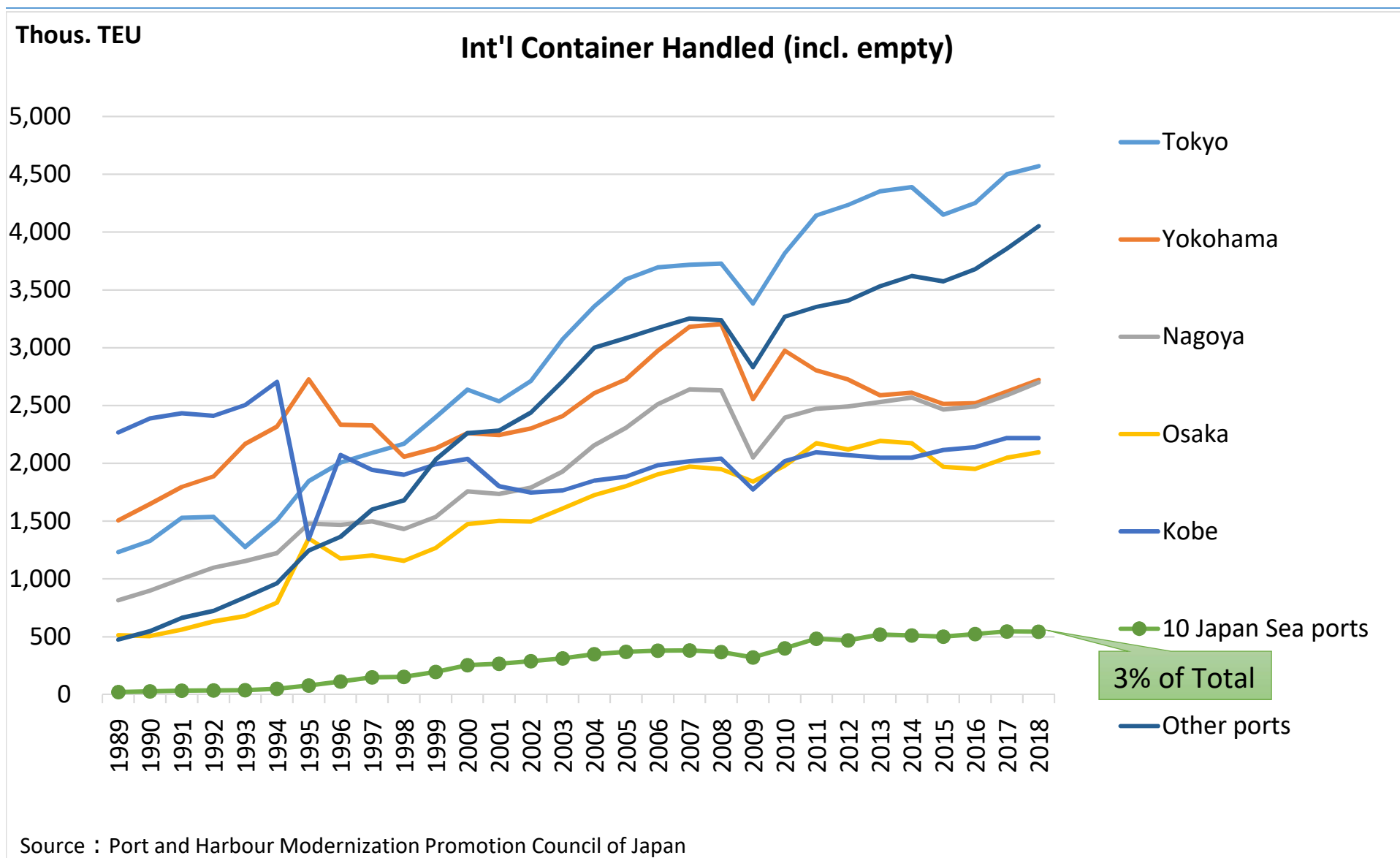


Source : Port and Harbour Modernization Promotion Council of Japan, 2018

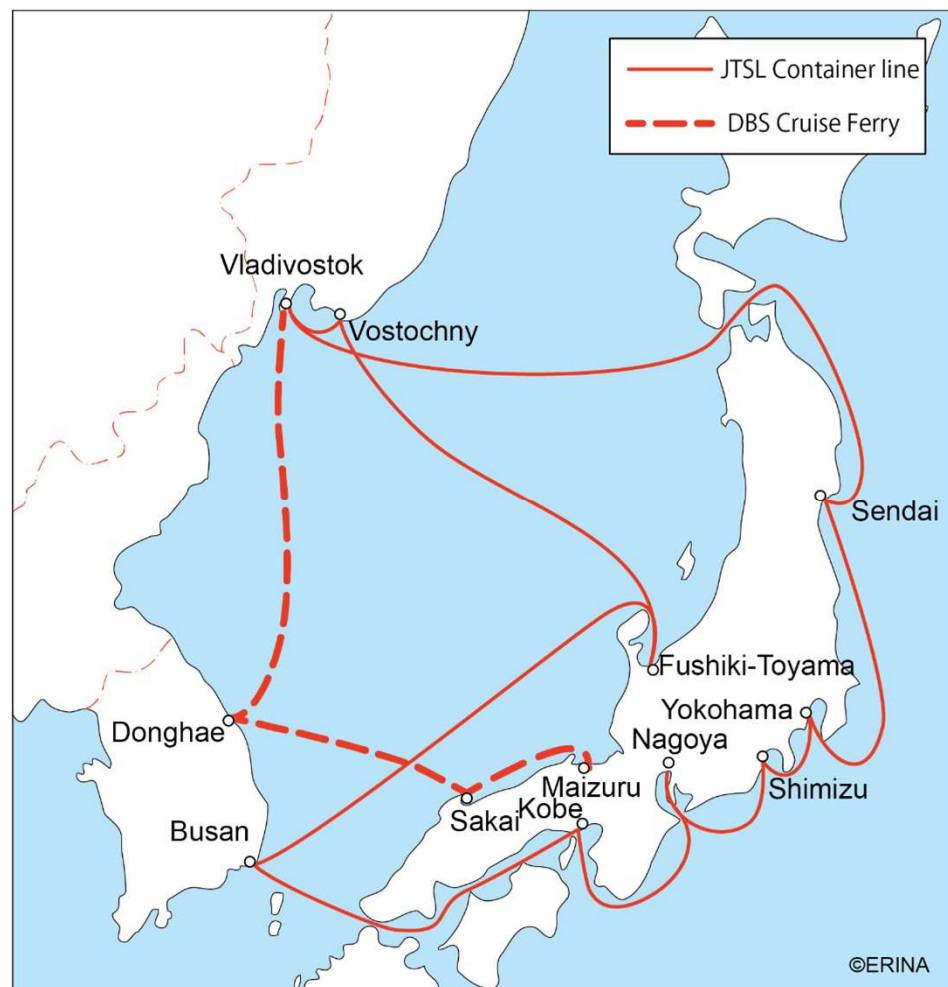
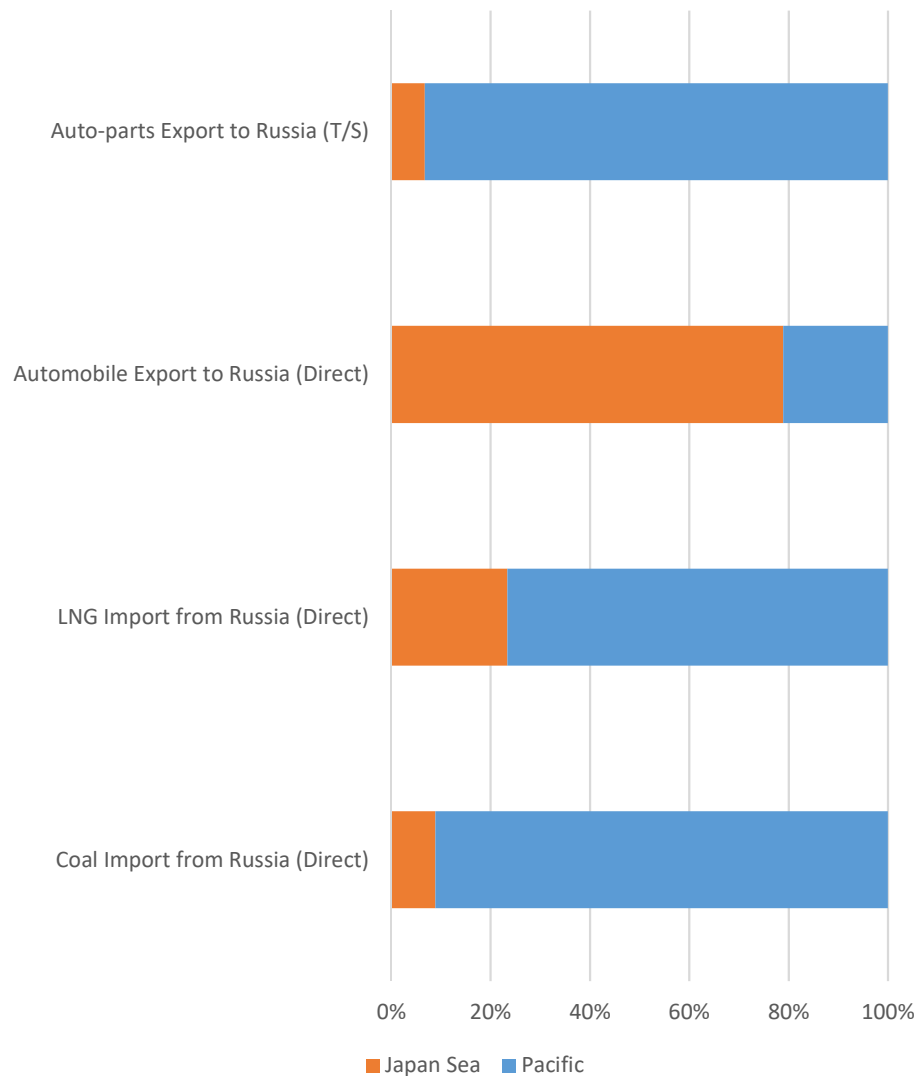
# Ref. Container Handling Port Ranking (2018)

Rank	Port	TEU	Rank	Port	TEU
1	Tokyo	4,570,702	20	Fushiki–Toyama	72,601
2	Yokohama	2,722,523	21	Akita	70,153
3	Nagoya	2,699,625	***		
4	Kobe	2,219,585	23	Kanazawa	68,474
5	Osaka	2,096,318	***		
6	Hakata	882,196	29	Sakai	36,898
7	Shimizu	483,450	30	Tsuruga	36,591
8	Kitakyushu	477,564	***		
9	Tomakomai	226,944	34	Sakata	33,106
10	Yokkaichi	205,547	35	Naoetsu	33,097
11	Sendai	179,754	***		
12	Niigata	170,833	49	Maizuru	18,623
13	Hiroshima	161,973	***		
			56	Hamada	4,336

# Their volume is still very small.



# Slight Different Picture in Japan-Russia Trade



Source : Port and Harbour Statistics, 2017

# Trial Shipments for TSR (SLB)

- MLIT organized 7 trial shipments in 2018.
- In the firstest case, it took only 15 days from Japan to Moscow. In some specific cases, special arrangements/documentation took some time.
- No damages to cargos.

Freight	Marine	at RFE Ports	Railway	Total
Beverages	4 days from Kobe	3 days	8 days	15 days
Food	10 days from Yokohama	6 days	7 days	23 days
Instruments	9 days from Nagoya	9 days	9 days	27 days
Construction materials	8 days from Yokohama	7 days	10 days	25 days
Machinery parts	10 days from Yokohama	9 days	8 days	27 days
Daily necessities	12 days from Yokohama via Pusan	5 days	11 days	28 days
Food, Daily necessities	2 days from Maizuru	17 days	12 days	31 days

MLIT is going to organize additional trial shipments to Europe in 2019.

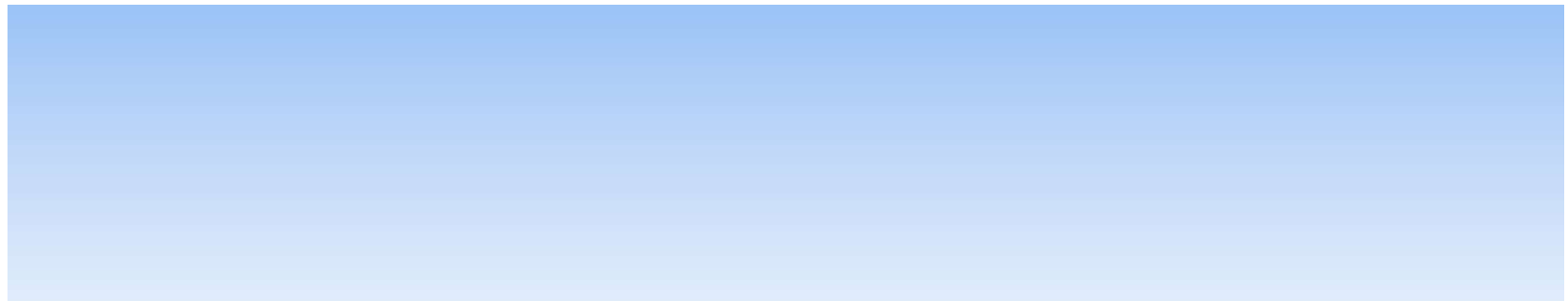


# “Quality Infrastructure Investment” Initiative

- Essence of Quality Infrastructure:
  - 1) Economic efficiency (low life-cycle cost), 2) Safety, 3) Resilience against natural disaster, 4) Consideration on environmental and social impact, 5) Contribution to the local society and economy (transfer of technology and human resources development)
- Main Players
  - JICA (Japan International Cooperation Agency): **Technical Assistance**
  - JBIC (Japan Bank for International Cooperation): **Finance**
  - JOIN (Japan Overseas Infrastructure Investment Corporation for Transport & Urban Development, established in 2014): **Involvement of private sector**
- Examples:
  - Mumbai - Ahmedabad Highspeed Railway Project (India)
  - Mombasa Port Development Project (Kenya)



## 2. Future Vision in the GTR

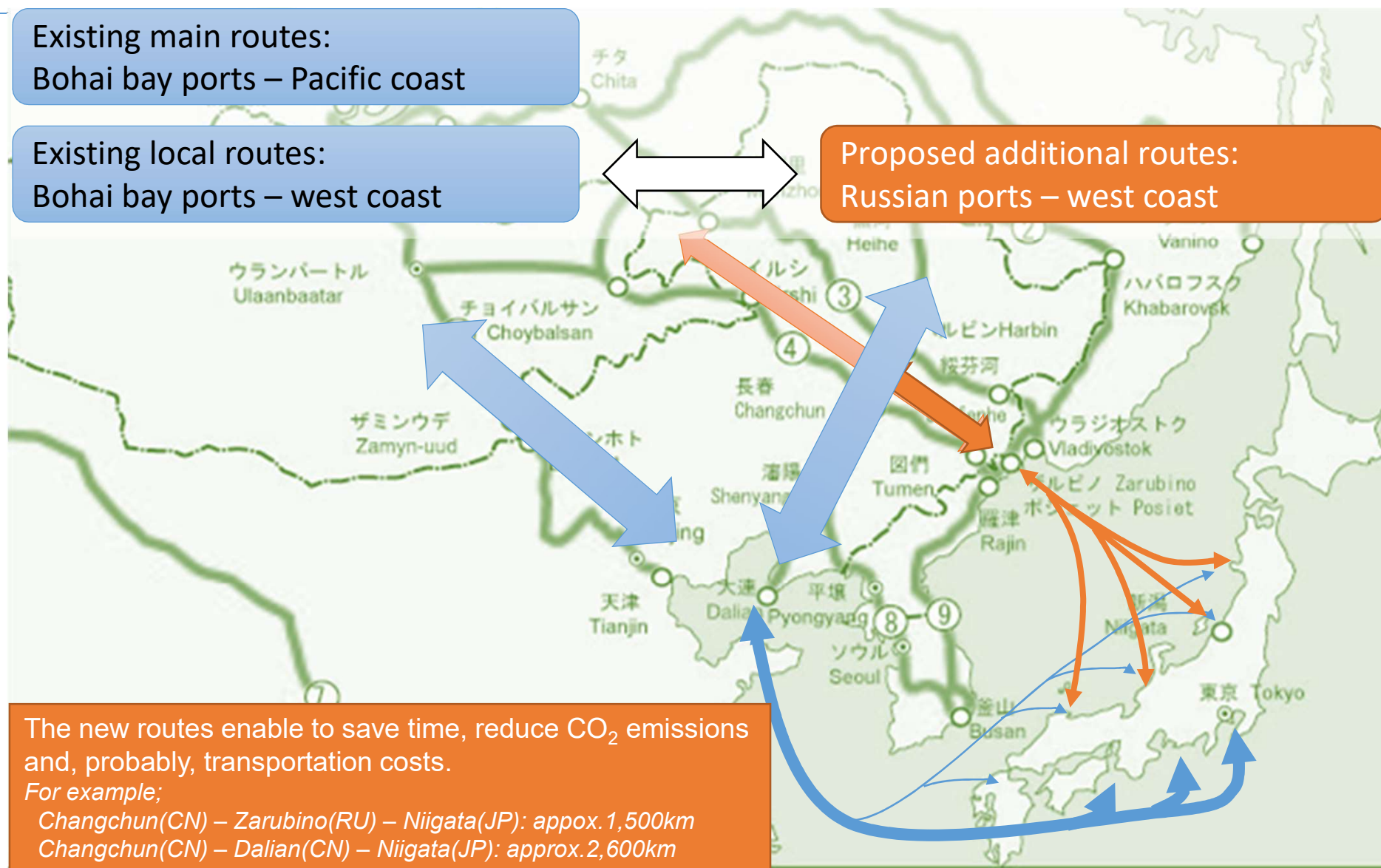


# From a standpoint of the Japanese west coast

Existing main routes:  
Bohai bay ports – Pacific coast

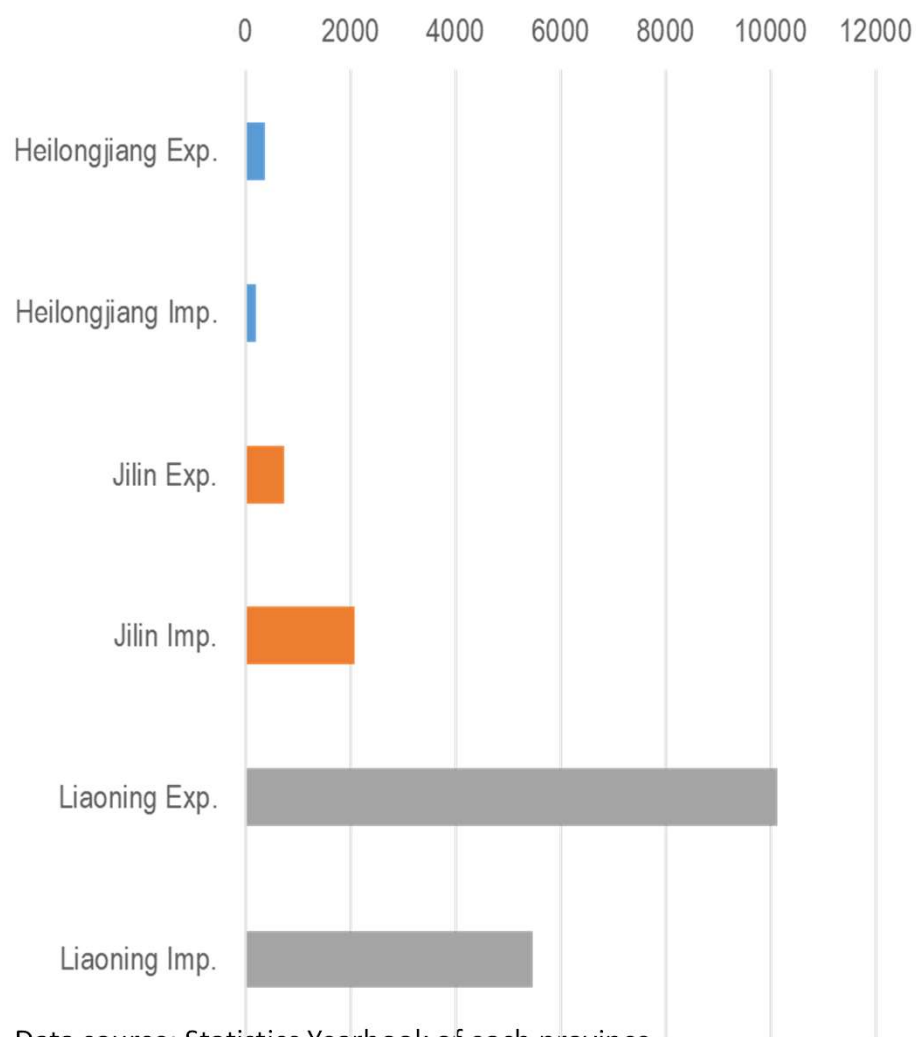
Existing local routes:  
Bohai bay ports – west coast

Proposed additional routes:  
Russian ports – west coast

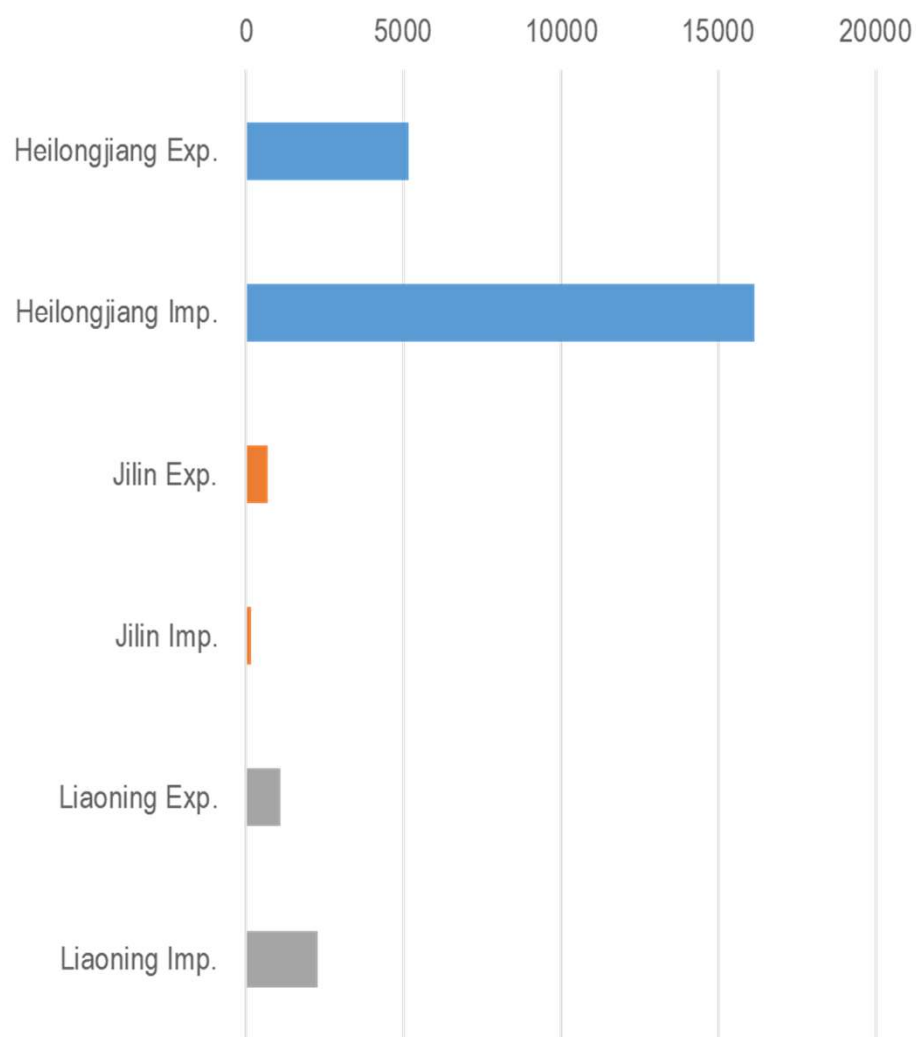


# Foreign Trade of Three NE China Provinces

**with Japan (2012, mil. USD)**



**with Russia (2012, mil. USD)**



Data source: Statistics Yearbook of each province

Thank you for your kind attention!!

<http://www.erina.or.jp>