

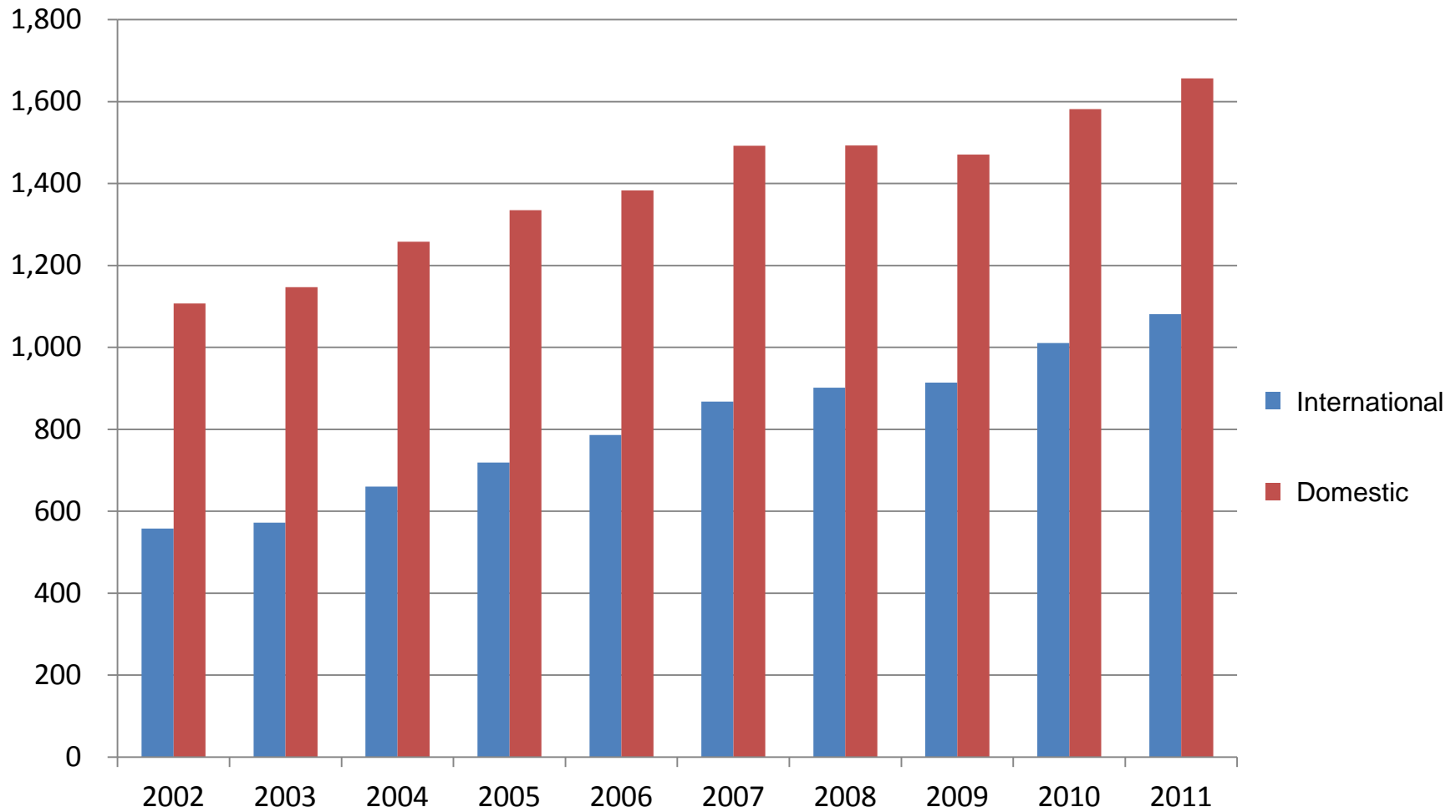
JAPAN'S CASE FOR DIVERSIFICATION OF AIR TRANSPORT SERVICES AND INCREASE IN CONSUMER BENEFIT

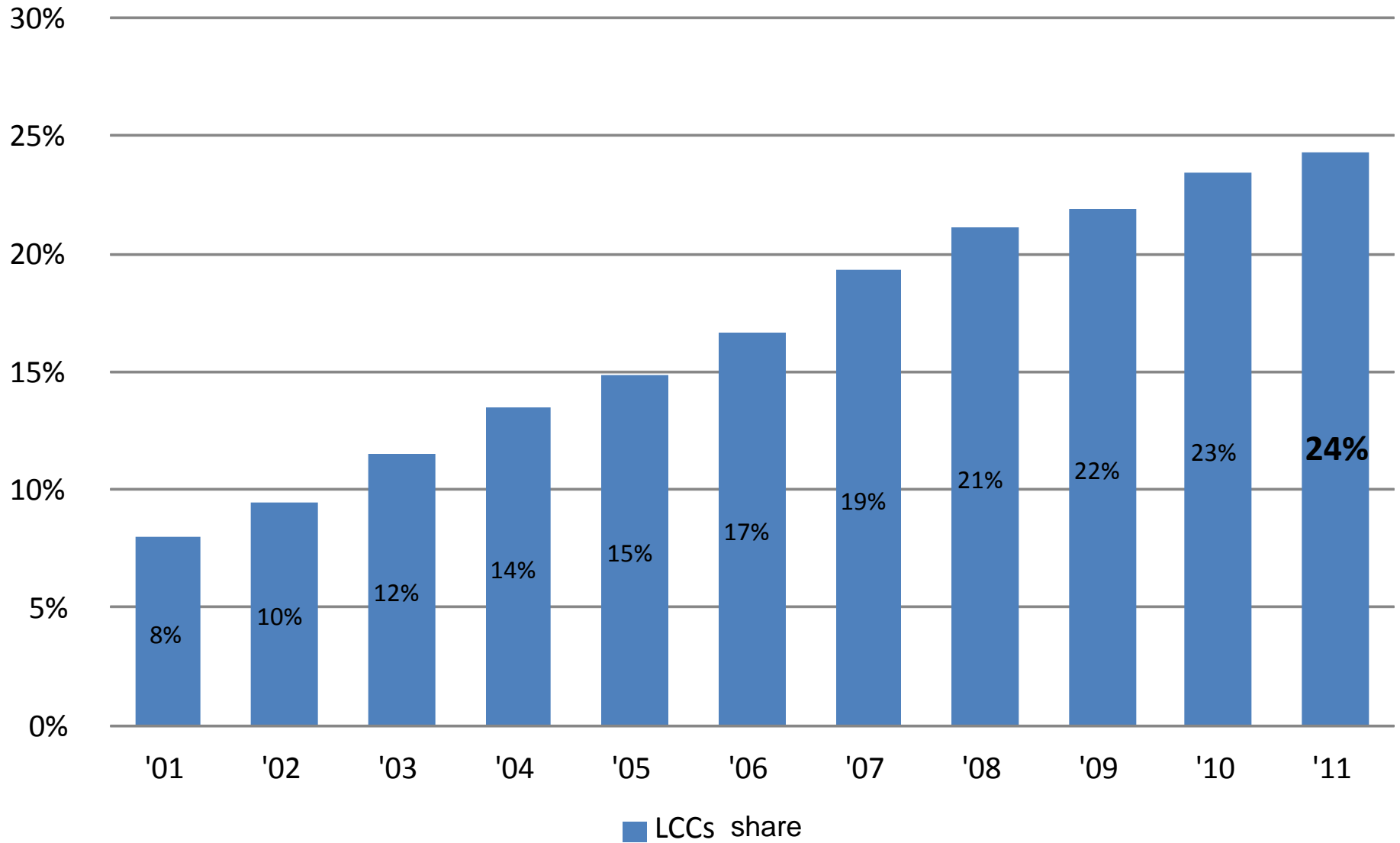
Japan Civil Aviation Bureau
Ministry of Land, Infrastructure, Transport and Tourism

1. Introduction
2. Change after LCCs Entry into Japan's Market



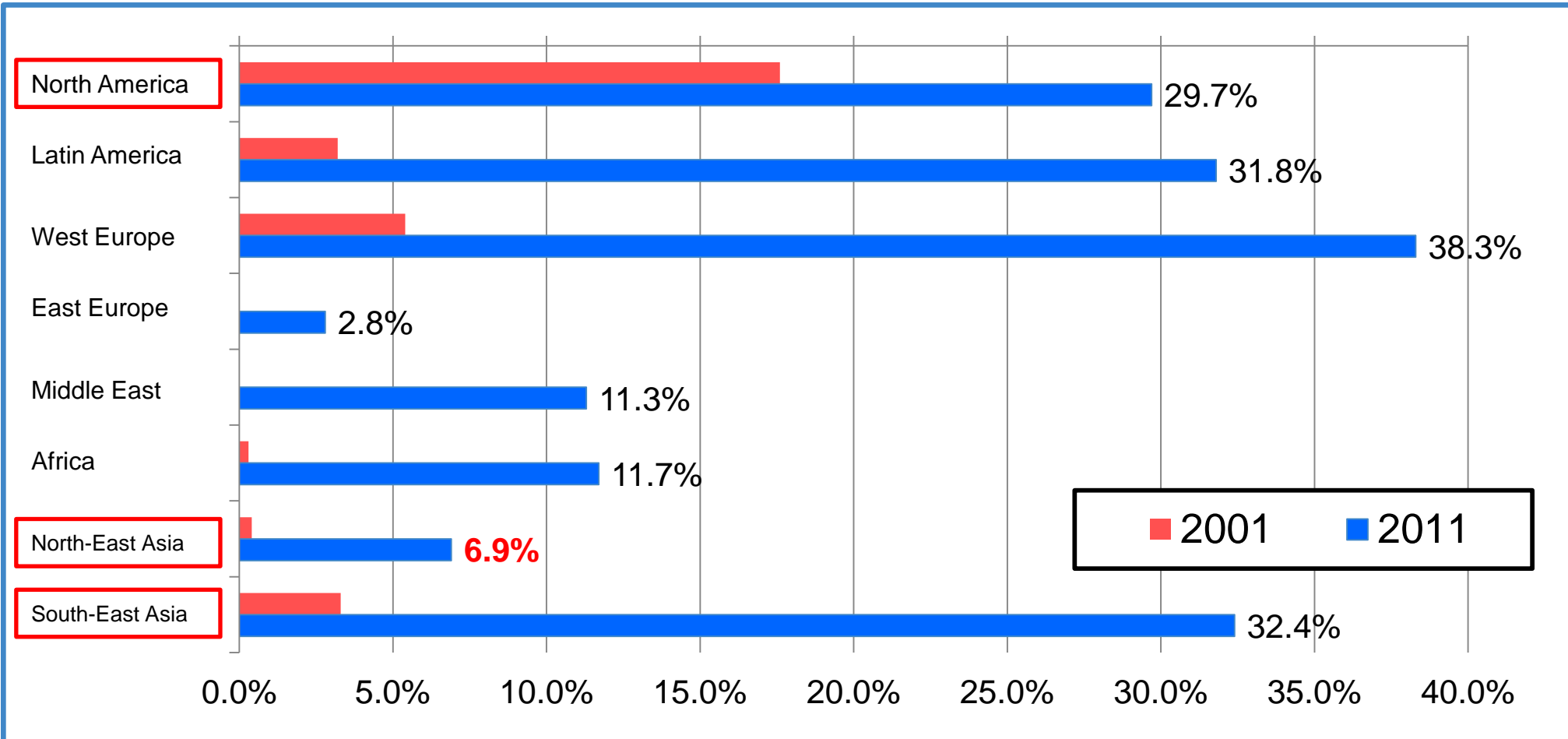
(million passengers)





The Share of LCCs by region

※seat·km based



※North-East Asia : Japan, Korea China, Taiwan, Mongolia

• Source : CAPA Centre for Aviation HP

1. Review of technical regulations

- Corresponding to the progress of aviation technology, and to the new airline business model
- 100 items revised (from 120 items requested)



Before : Engraving



After : Plate attached

2. Construction of dedicated terminals for LCCs

- Simple structure with low cost terminal, initiated by airport operator

Promoting new entry of airlines including LCCs

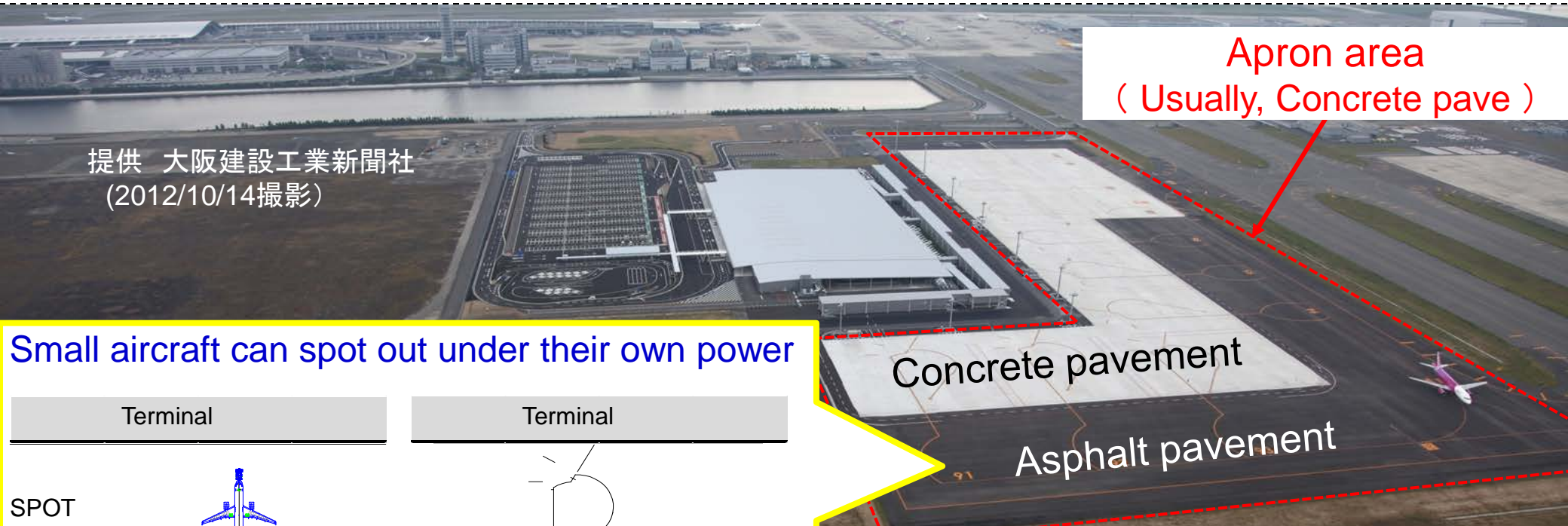
- Emergence of Japanese LCC



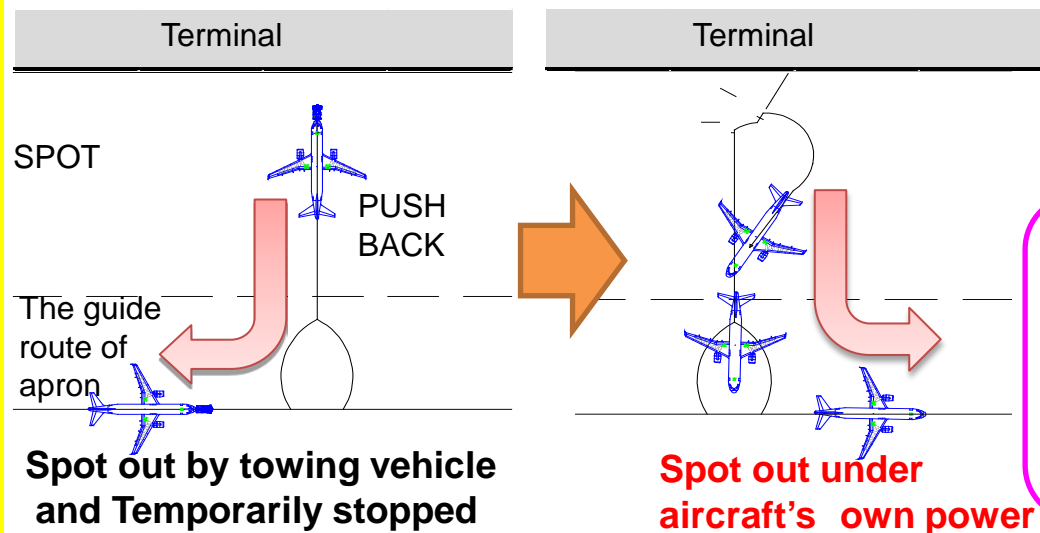
- A Japanese airline in consideration to provide new international services



- Well thought-out design, keeping functionality with less investment
 - Apron where small aircraft can spot out under their own power



Small aircraft can spot out under their own power



Rationalization of design

- This approach has reduced the burden on the apron's pavement.
 - Therefore, the guide route of apron could be paved with asphalt.
 - **Achieved reduction of construction costs.**

- Terminal capacity: 4 million passengers per year
- Terminal 2 building constructed in approximately 40 million US\$ ※

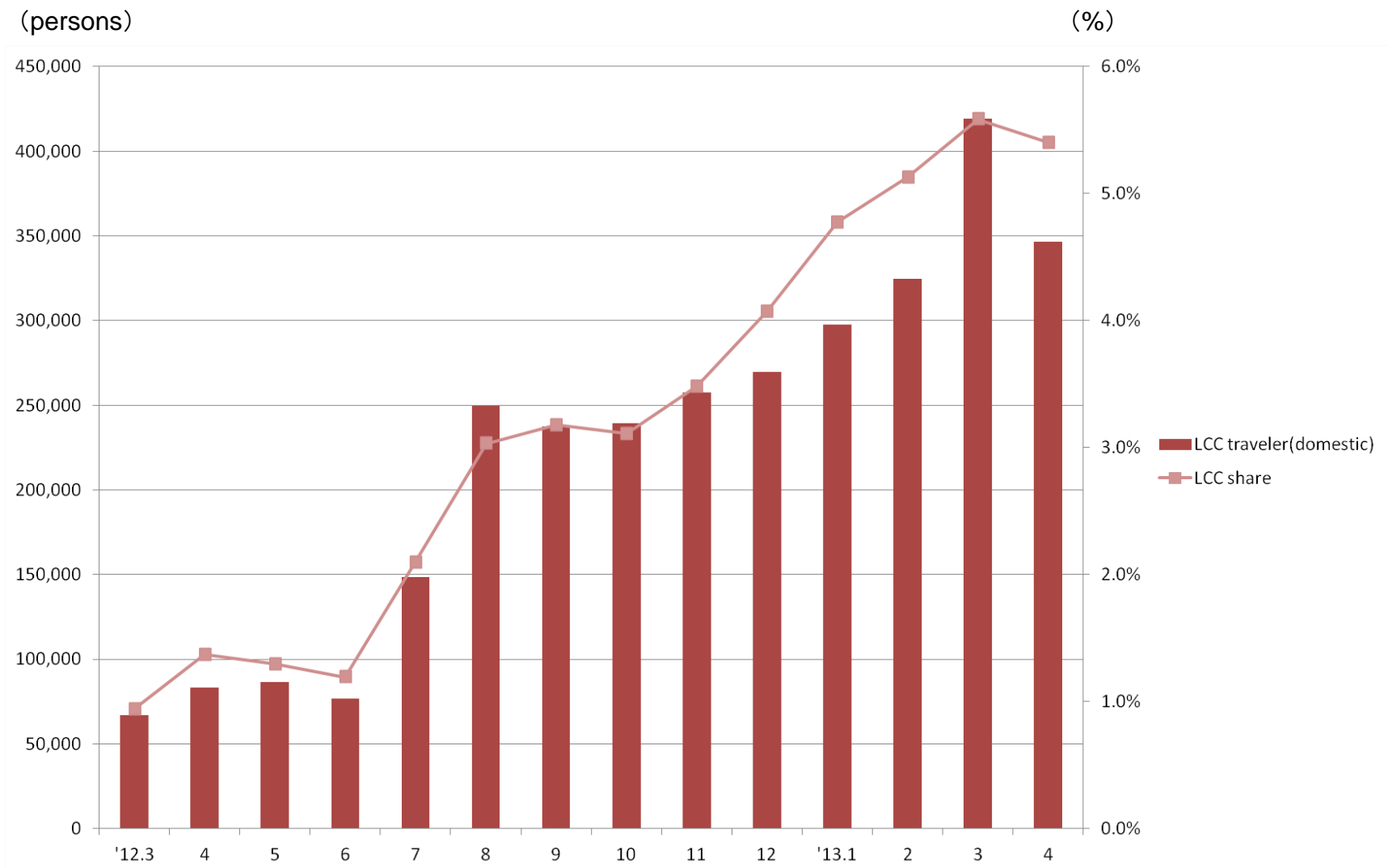
- ※ Exchange rate : 1 US\$ = 95 yen
- ※ Except for the construction costs of auxiliary facilities (apron, parking, etc.)

- Total floor area of approx. 30,000 m²
- Single-story building (partly two-story)
- Used for both international and domestic flights
- No passenger boarding bridges, Passenger board via ramp after walking to an aircraft



1. Introduction
2. Change after LCCs Entry into Japan's Market

The number of LCC passengers has been increasing gradually, accounting for **over 5%** of domestic traffic.



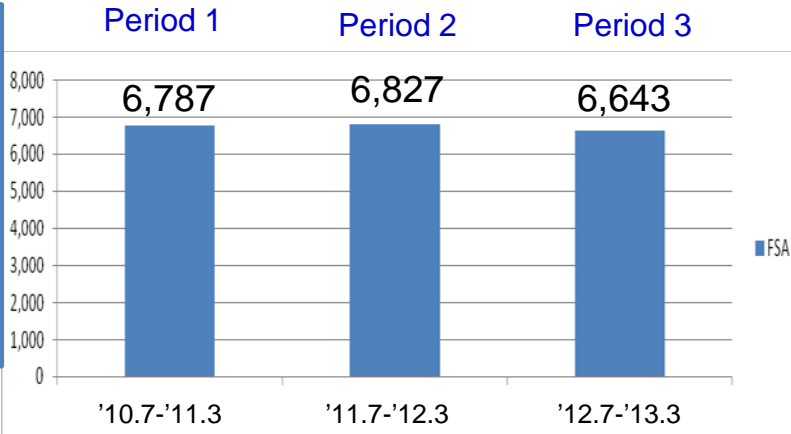
Increase in air passenger (Tokyo Metropolitan Area, Kansai Area=Sapporo)

Tokyo Metropolitan Area = Sapporo

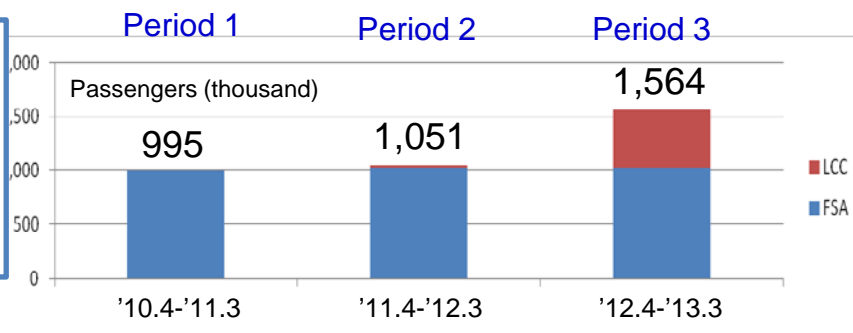
Passengers (thousand)

Kansai Area = Sapporo

Haneda
-
Sapporo

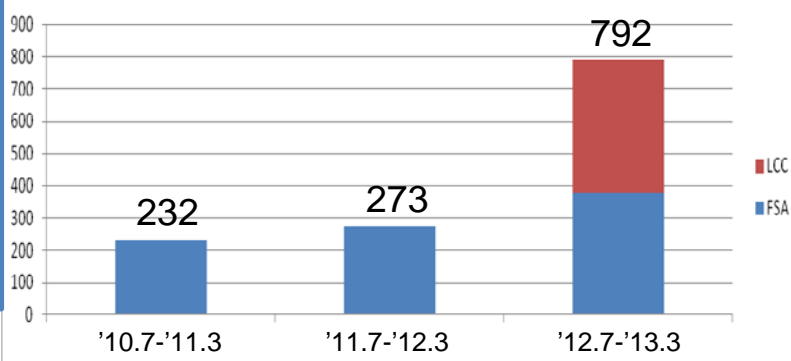


Kansai
-
Sapporo



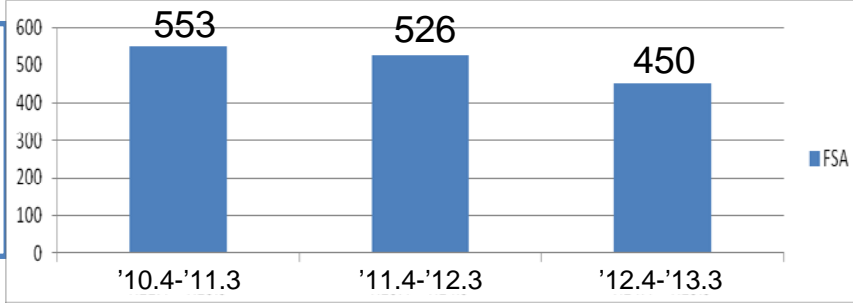
+

Narita
-
Sapporo



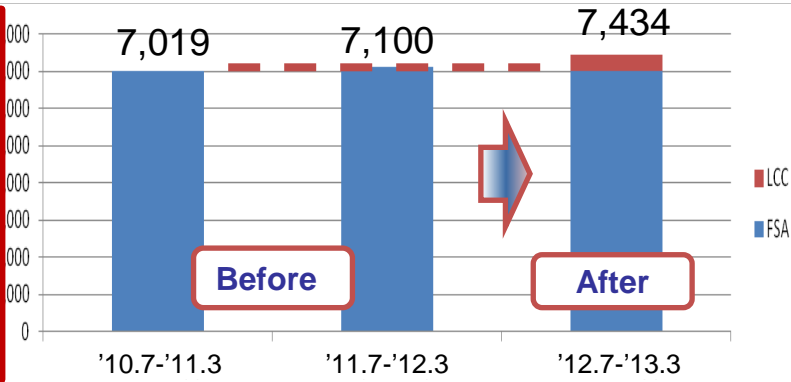
+

Itami
-
Sapporo



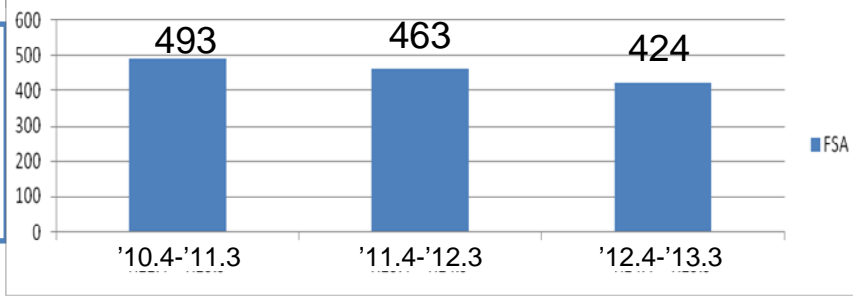
||

Tokyo metro
politan
area
-
Sapporo



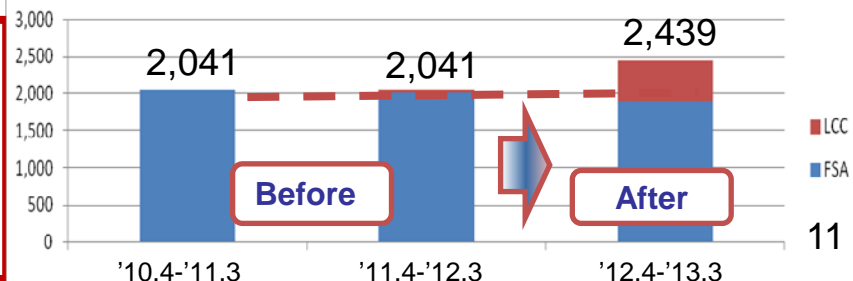
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Kobe
-
Sapporo



||

Kansai
Area
-
Sapporo



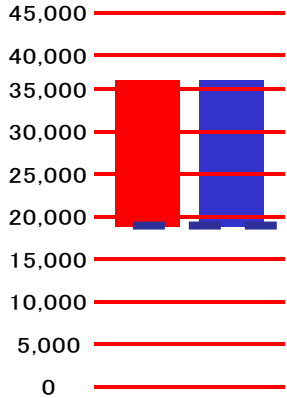
The Change of Fares Before & After

[unit:¥]

Narita=Sapporo

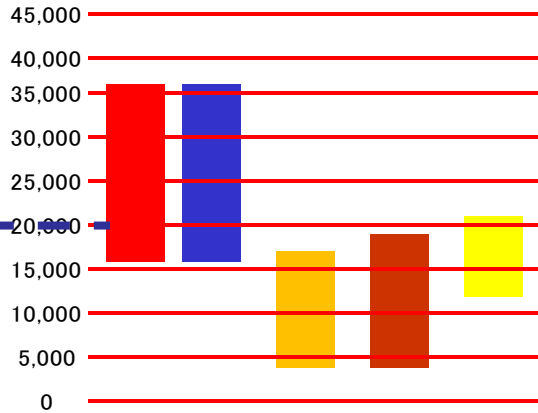
Before 2011.8

JAL ANA



After 2012.8

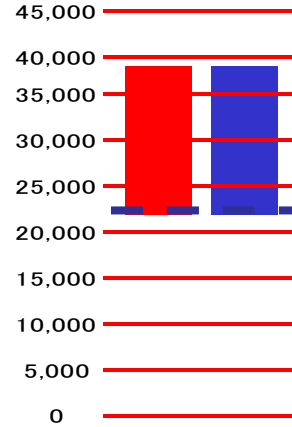
JAL ANA Jetstar Airasia Skymark



Narita=Fukuoka

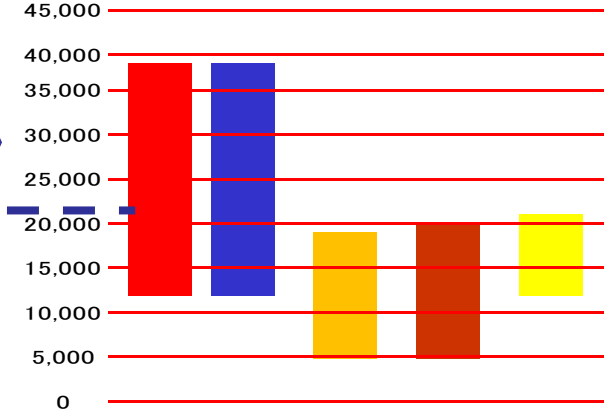
Before 2011.8

JAL ANA



After 2012.8

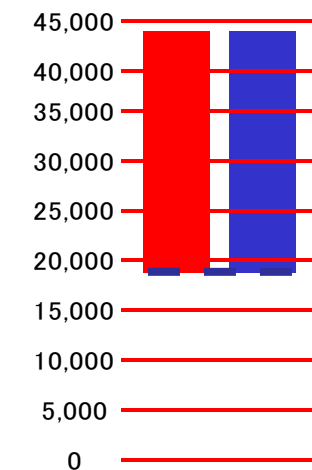
JAL ANA Jetstar Airasia Skymark



Kansai=Sapporo

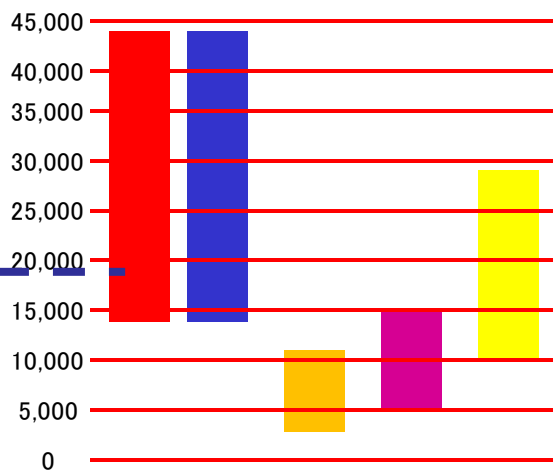
Before 2011.8

JAL ANA



After 2012.8

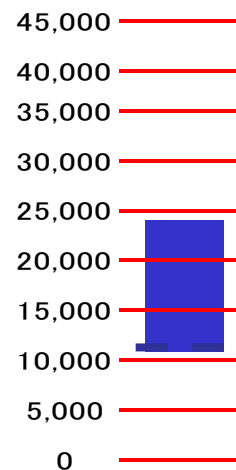
JAL ANA Jetstar Peach Skymark



Kansai=Fukuoka

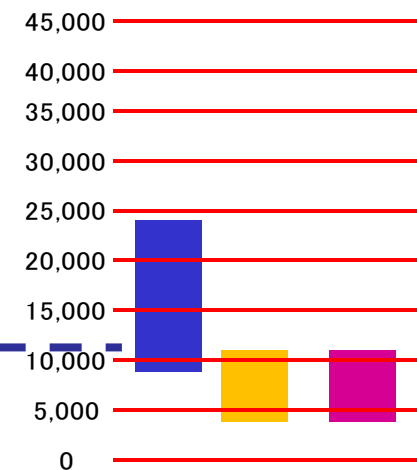
Before 2011.8

ANA



After 2012.8

ANA Jetstar Peach



※Source : Fares with notification by June 12th 2012

Promoting LCCs will create new demands for domestic and international flights

Developing air transport, while also leading the increase in the number of tourists than ever before.

Securing the same level of safety

The same regulation is applied in Japan for all domestic air carriers including LCCs.

Thank you for your attention

Civil Aviation 航空
Maximizing Airport Operations



Ministry of Land, Infrastructure, Transport and
JAPAN CIVIL AVIATION BUREAU



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