



**The value of Transit-oriented
development for local communities
- Osaka Umeda area -**

March 26, 2026

West Japan Railway Company

History

Privatized in 1987

Originally part of Japan National Railway

Employees



21,665 (JR West)



45,450 (JR West Group)

Subsidiaries

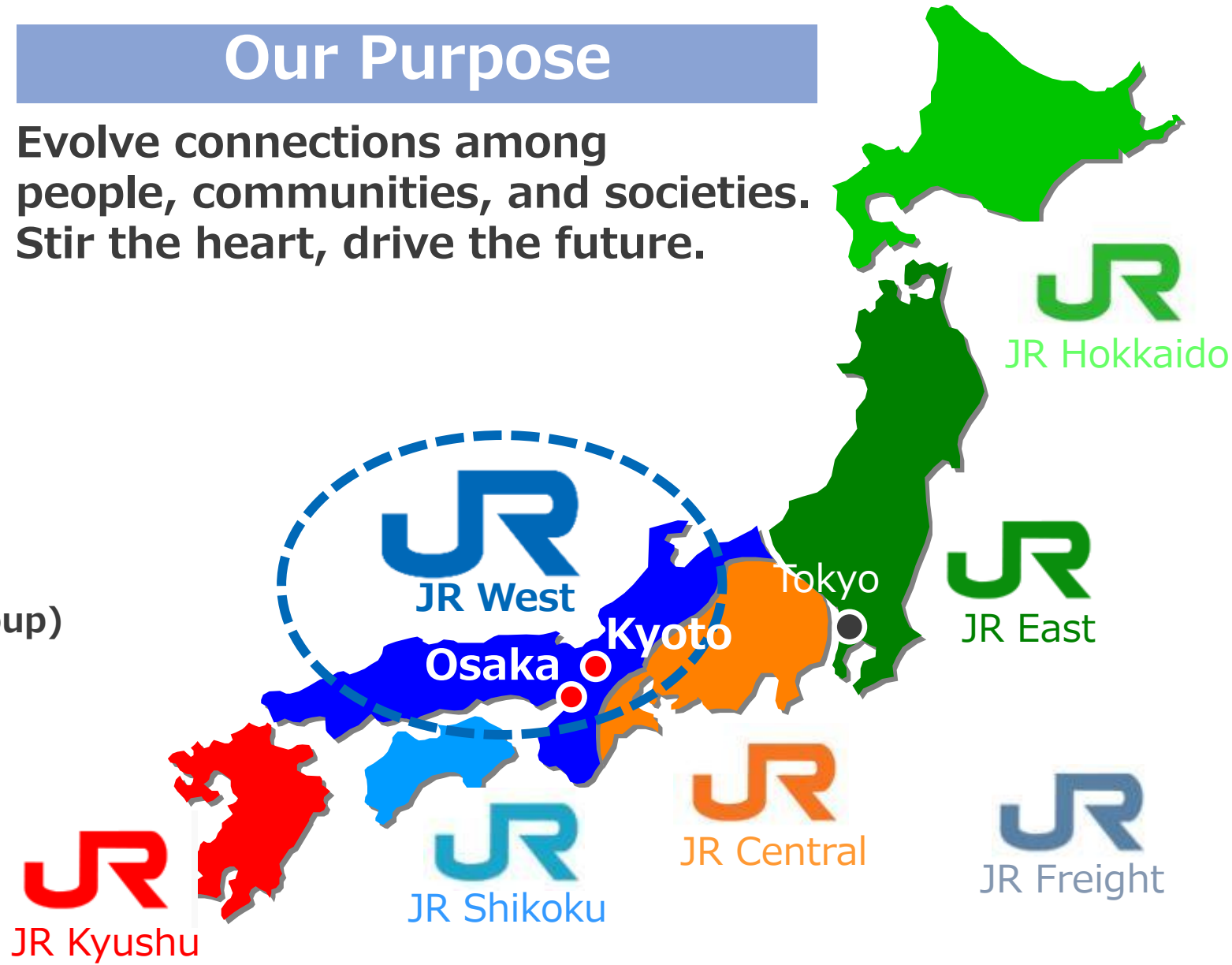


145

as of March 2025

Our Purpose

Evolve connections among people, communities, and societies. Stir the heart, drive the future.



Total Route Length



4,897 km

Passengers



5 million/day

Stations



1,150

Rolling stocks





6,303

as of March 2025



Main Business Fields




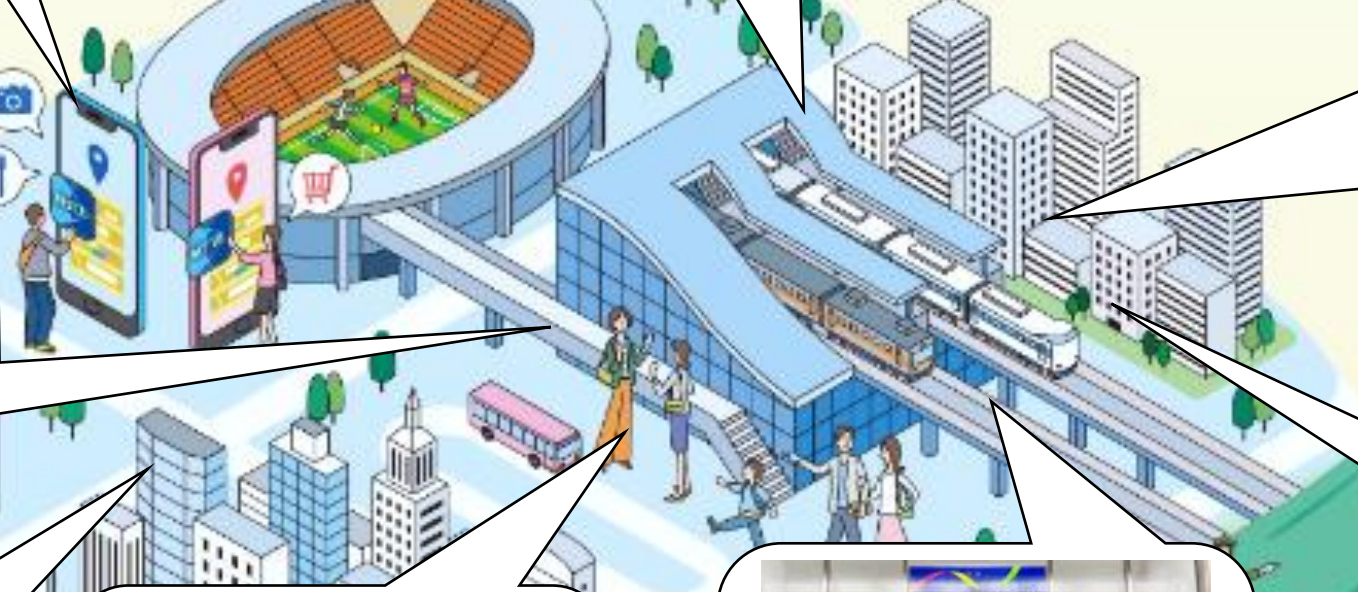
Digital services
Maas, Payment services



Mobility(Rail, Bus, Ferry), and Maintenance



Retail and Food services




Shopping Center
Department Store




Real estate
City development



Adverting



Travel Agency



Station Hotels
Budget Hotels

Total Revenues **¥1,707.9 billion** (FY2024.3)



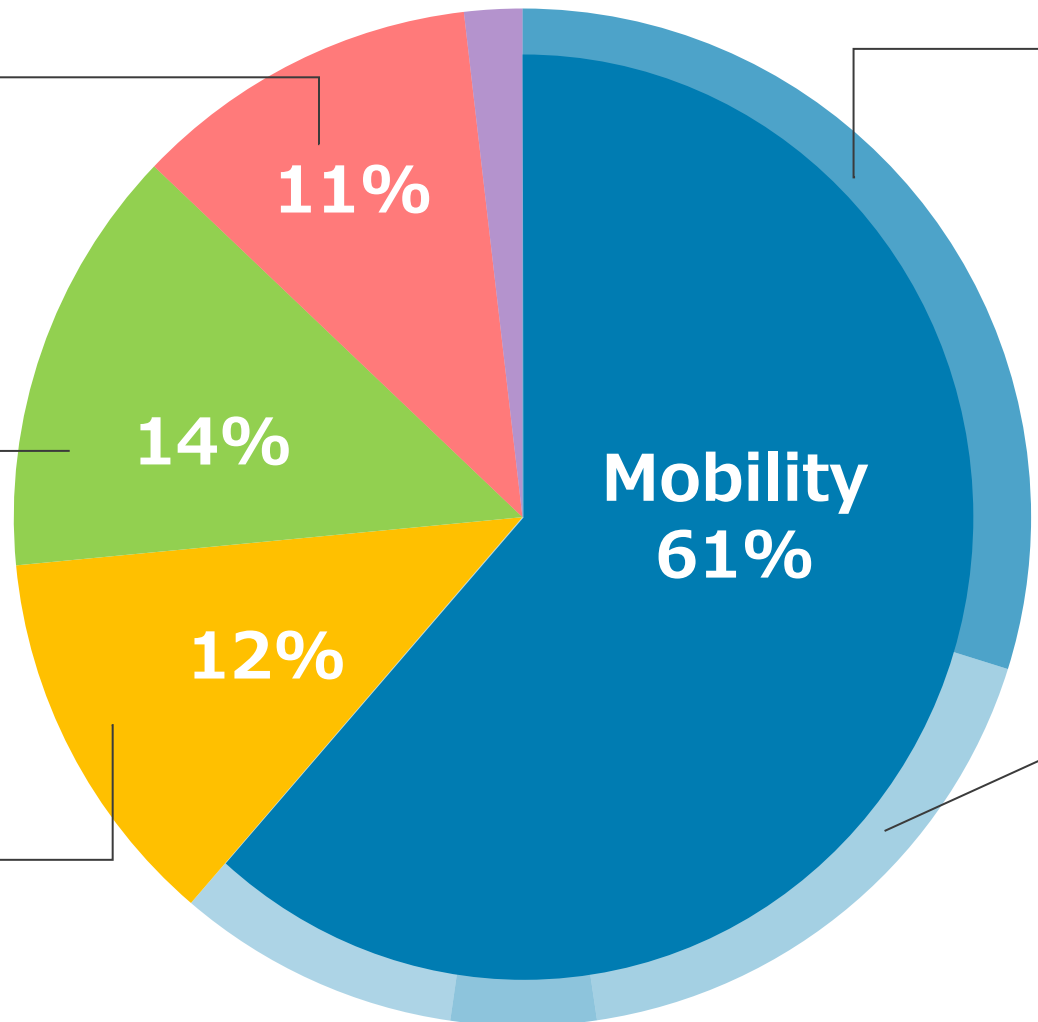
Travel and Regional Solution



Real Estate



Retail

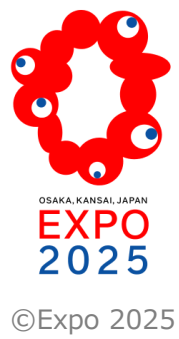
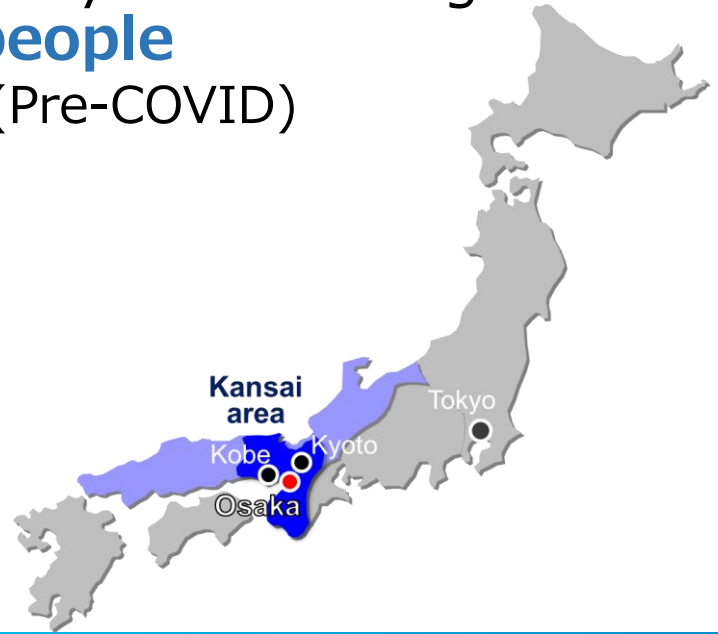
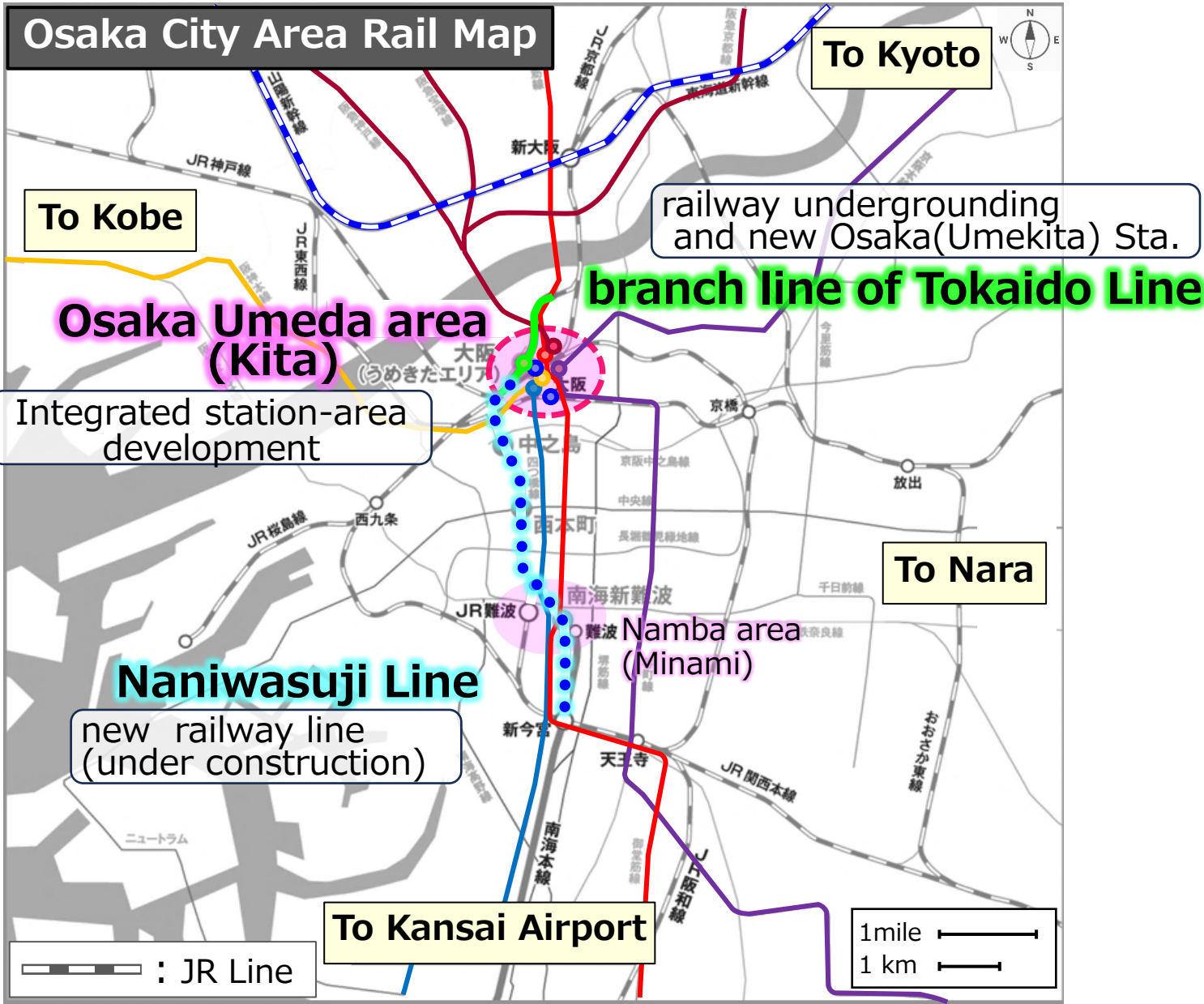


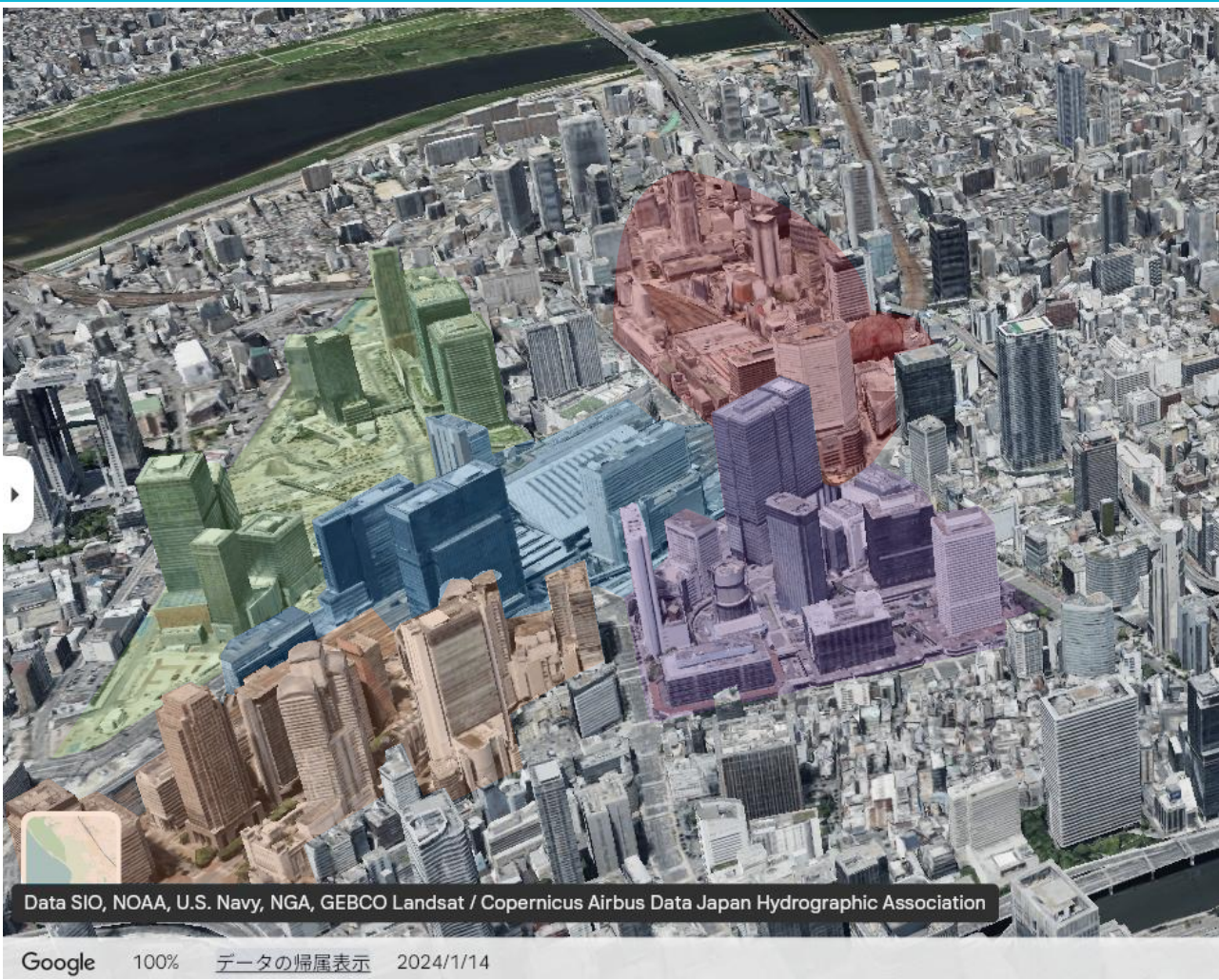
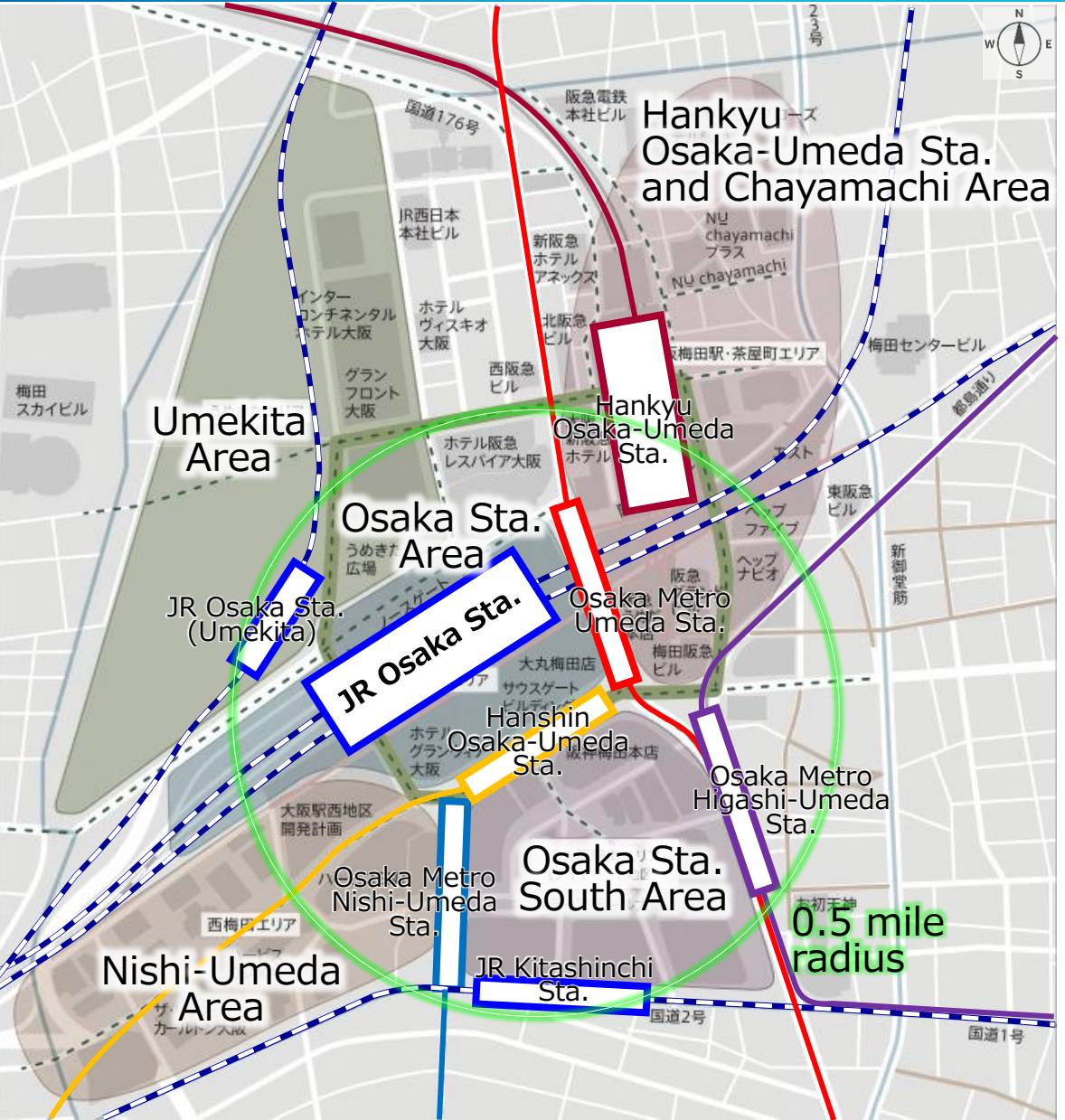
High-speed Rail "Shinkansen"



Conventional railway lines (Osaka, Kyoto etc)

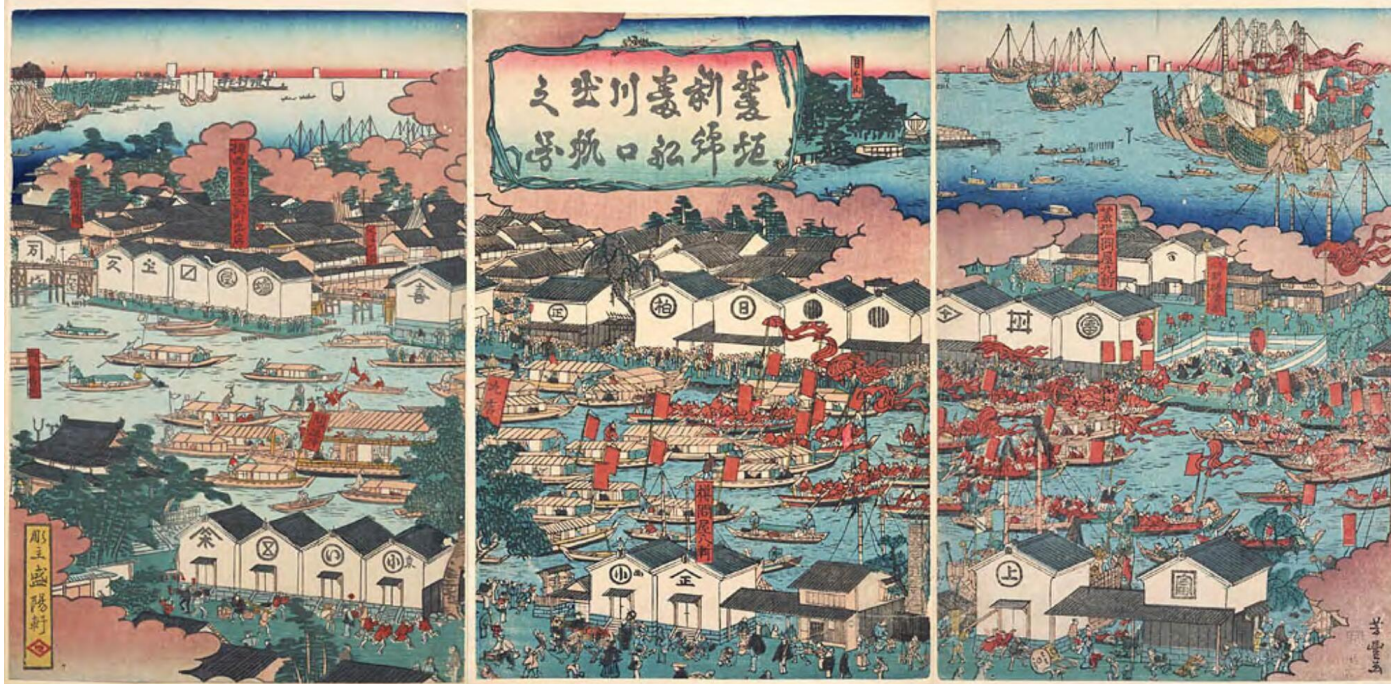
- **Largest terminal in Western Japan** (commonly known as Kita = North), located in Osaka, the center of Japan's second-largest metropolitan area
- Major transportation hub with **7 stations and 12 lines** connecting cities across Kansai, Shinkansen stations, and Kansai Intl. Airport
- Daily station usage: **2.5 million people** (Pre-COVID)





Area that has continuously evolved by integrated railway construction and urban development

Source: Compiled from website of Umeda Area Management Alliance



“Cotton Transport Ships Racing to Edo Set Sail from the Mouth of the River” by Gansuitei Yoshitoyo (1830 to 1866) / Osaka Prefectural Nakanoshima Library

大阪府立中之島図書館
OSAKA PREFECTURAL LIBRARY



“Famous Views of Osaka: Fish Market at Zakoba (Image: National Diet Library)

Water City Osaka - Hub of Maritime Trade

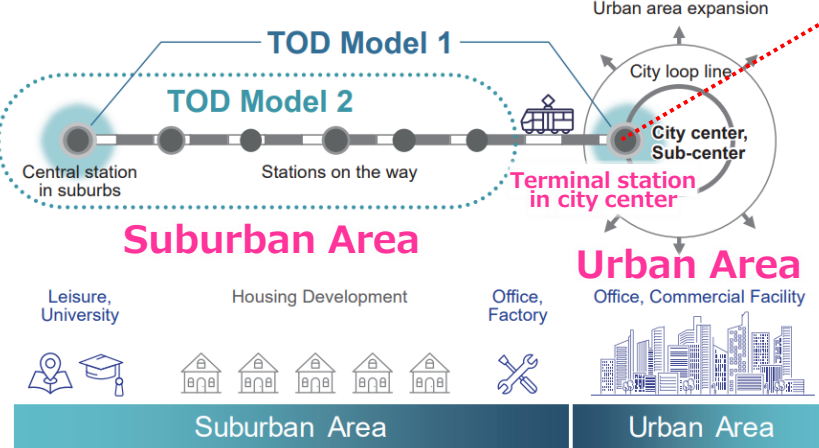
a sprawling network of canals
/ trading hub with Hokkaido, Edo and nearby cities

Kitchen of the Realm – Hub of Commerce

Japan’s largest logistics hub
/ crossroads for the constant interchange of people, goods, money, and information

Osaka has a historical and cultural background as **Japan’s largest logistics and commercial hub**, founded on water transport.

Transit-oriented development (TOD)



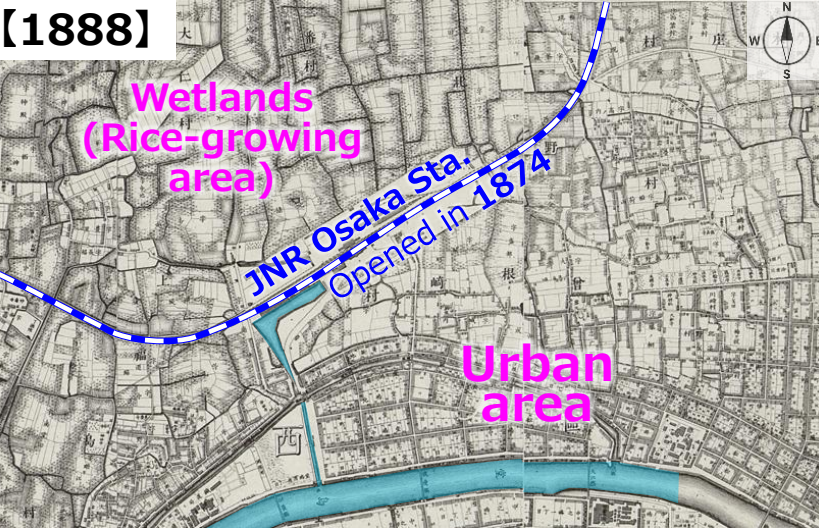
Source: Japan's TOD Guidebook (Ministry of Land, Infrastructure, Transport and Tourism, Urban Development Bureau)

Osaka Umeda area

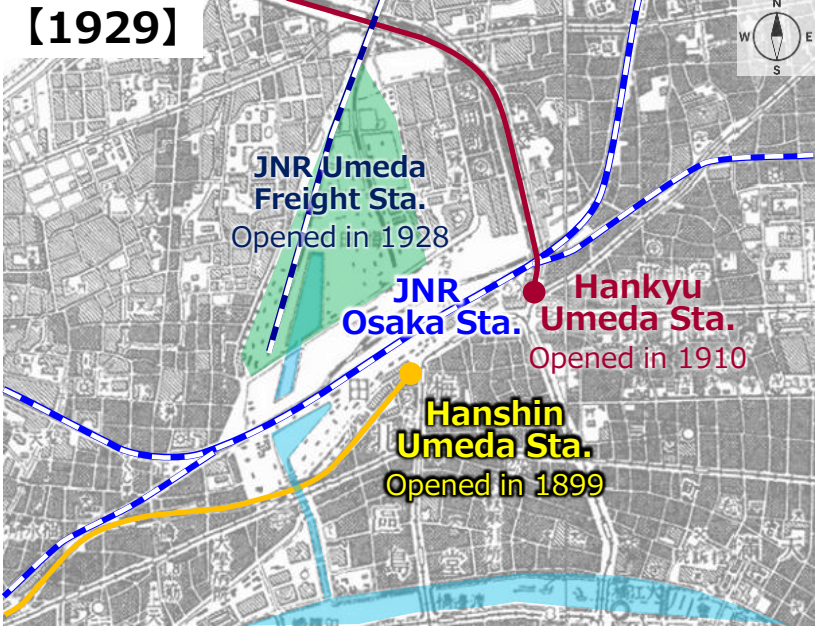
- Private railway lines open
- Japan's TOD business model started, creating urban development to generate rail demand
- Freight and passenger lines separated, and **Umeda Freight Sta. established** as node connecting water and land transport

- Public **subway lines** opened
- Water transport discontinued; **cargo container yard expanded** (peak of rail freight transport)
- Urban development around stations progressed

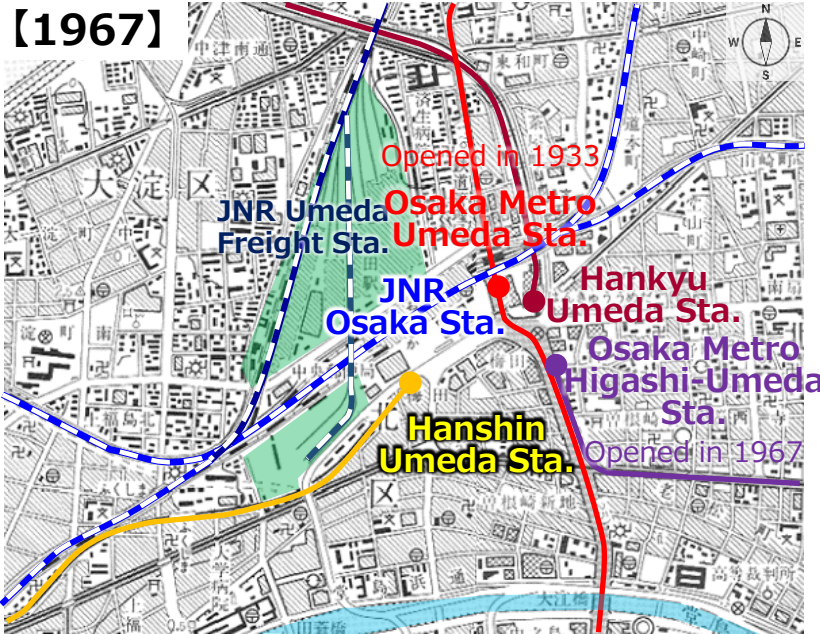
➤ **Osaka Station was born** in a wetland area away from the city center.



Source: Compiled from Osaka Survey Map by the Ministry of Home Affairs (Map No. 23, 1980), Osaka City Library Digital Archive



Source: Compiled from "Konjaku Map" (Now and Then Map)



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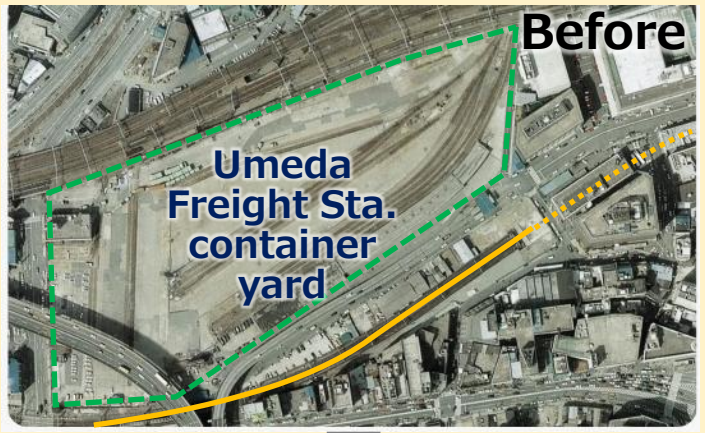
[1970s to 2000s]

- Urban development around stations advanced with **railway facility upgrades** and other infrastructure improvements

West

Hanshin Nishi-Umeda area 1990-2008

- Development with **relocation of railway underground** at former **freight yard** site

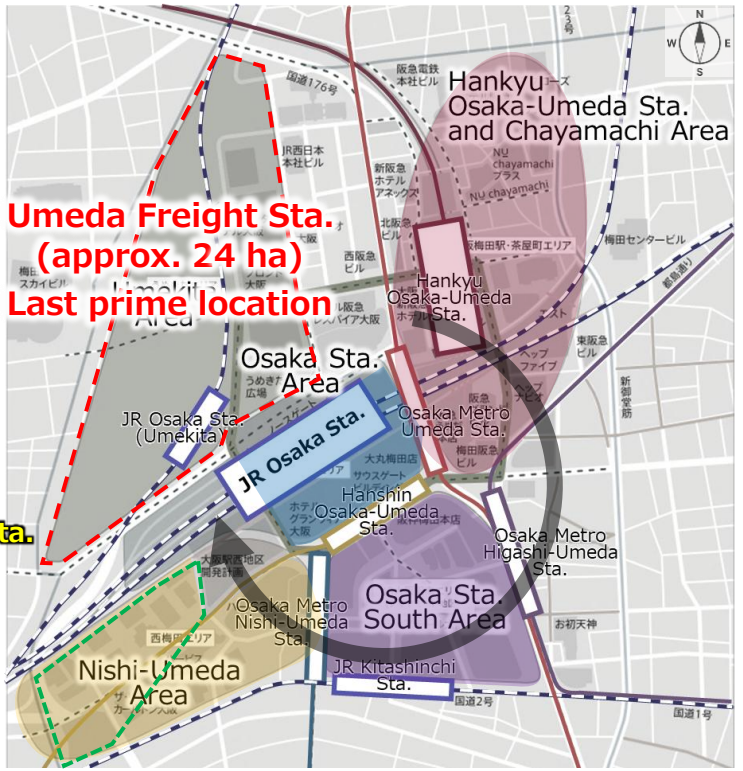


Source: website of OSAKA GARDEN CITY

JR Osaka Sta. area 1979-1991



- Station building development with **4th-generation Osaka Station**



Source: Compiled from website of Umeda Area Management Alliance

East

Hankyu Umeda area 1969-2005

- Development of surroundings with **station expansion and relocation**



Photo provided by: Hankyu Corporation

Photo provided by: Hankyu Hanshin Properties Corp.

South

Osaka Metro area 1970-2003

- Development of surrounding areas with **subway & other infrastructure development**



Source: Osaka Station Front Urban Redevelopment Project Report (Osaka City Urban Development Bureau)

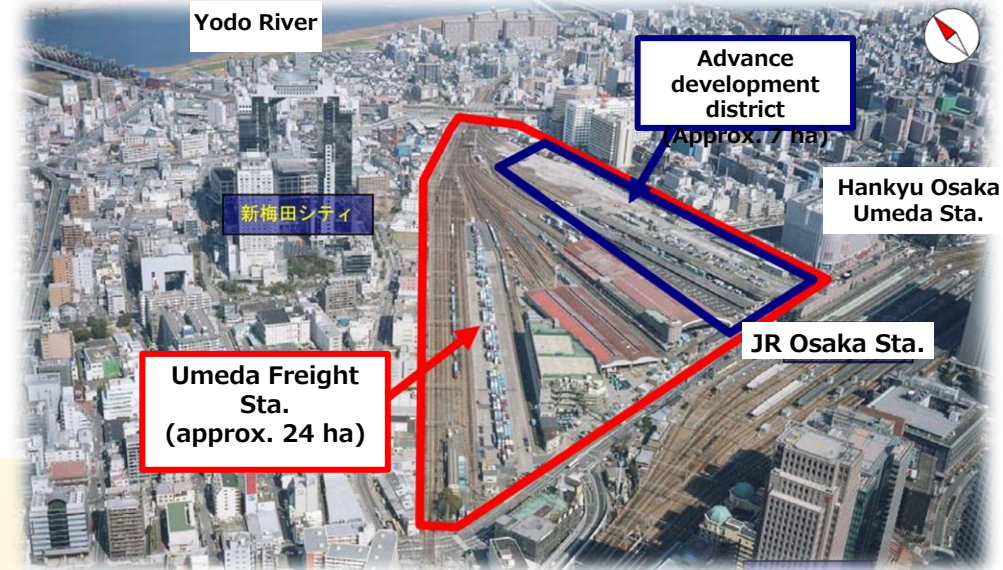
■ 1999: Decision made to relocate

Umeda Freight Sta. (approx. 24 ha)

↓ Active industry/government/academia discussions
(International concept competition held;
Deliberation council established)

■ 2004: Basic plan for Osaka Sta. North District Urban Development formulated

New hub driving advancement of Osaka and Kansai,
enhancing Japan's international competitiveness



Source: Compiled based on Basic Plan for Osaka Station North District Urban Development (Osaka City)

Features of urban development

Urban branding that strengthens international competitiveness

Urban development centered around large urban parks

Urban function layout centered on innovation hubs

Pedestrian-centered walkable space development

Phased development through public-private partnerships



Three approaches introduced today

- ① **Incorporating urban functions to stations**, directly connecting surrounding neighborhoods and **pedestrian routes**
- ② Railway upgrades that **create large-scale development sites** and transportation policies for **linking international airport and city center**
- ③ **Revitalizing economic activity** and **enhancing real estate value** through development of **quality urban spaces**



OSAKA STATION CITY

“The Station Becomes the City”
“New Discoveries and Excitement”

SOUTH GATE BUILDING

NORTH GATE BUILDING



- Development of symbolic grand roof
- Development of people's plaza space

- Creation of vibrant hubs (retail, entertainment, etc.)
- Construction of walkways connecting station and town

Photo provided by UR Urban Development Corporation



Before

2011: Osaka Sta. renovation and station building opening (5th generation Osaka Sta.)

■ Knowledge Capital (Hub for intellectual creation & exchange)



Source : website of Knowledge Capital

2013: Umekita Advance Development District (Grand Front Osaka) opening

[Other developer]

Tokaido Line Branch underground relocation and new station construction / Naniwasuji Line development

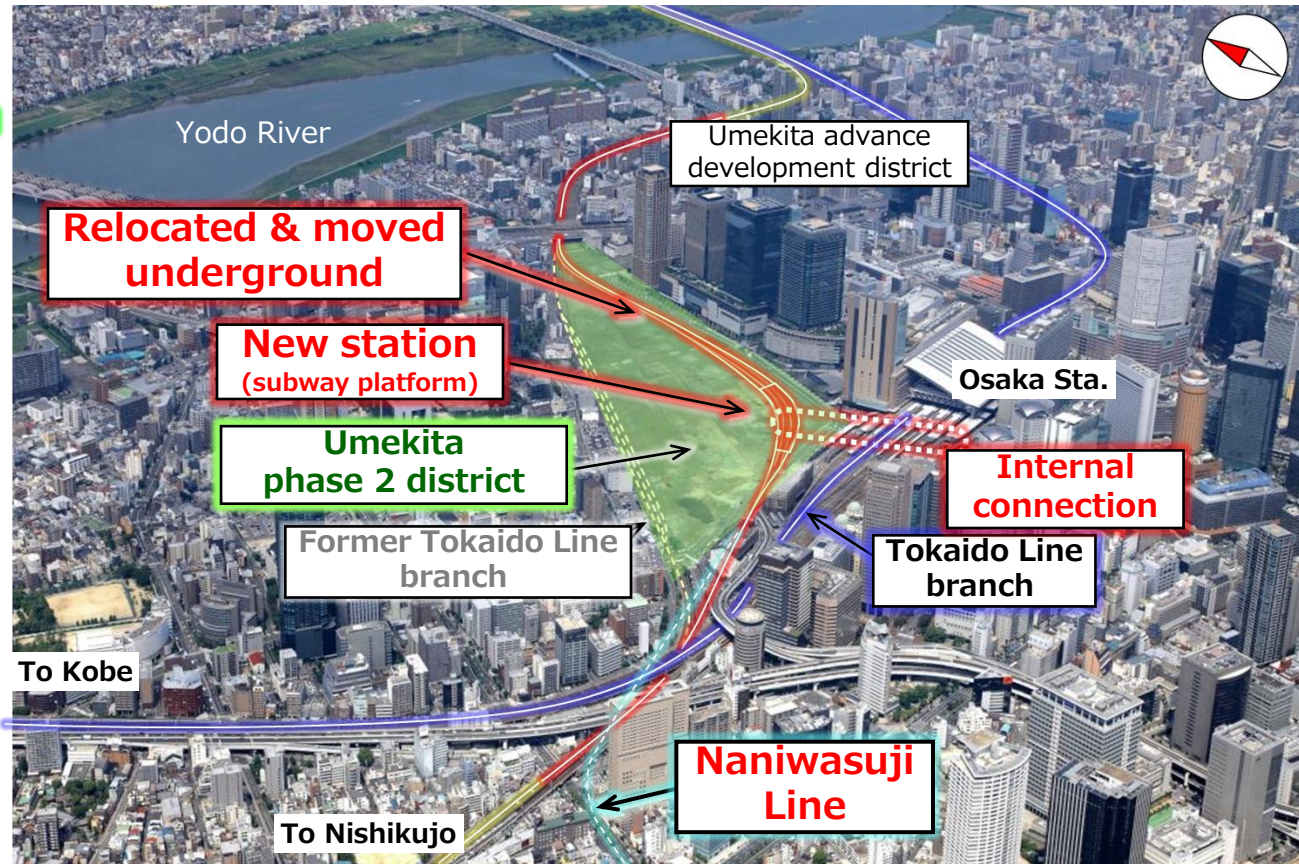
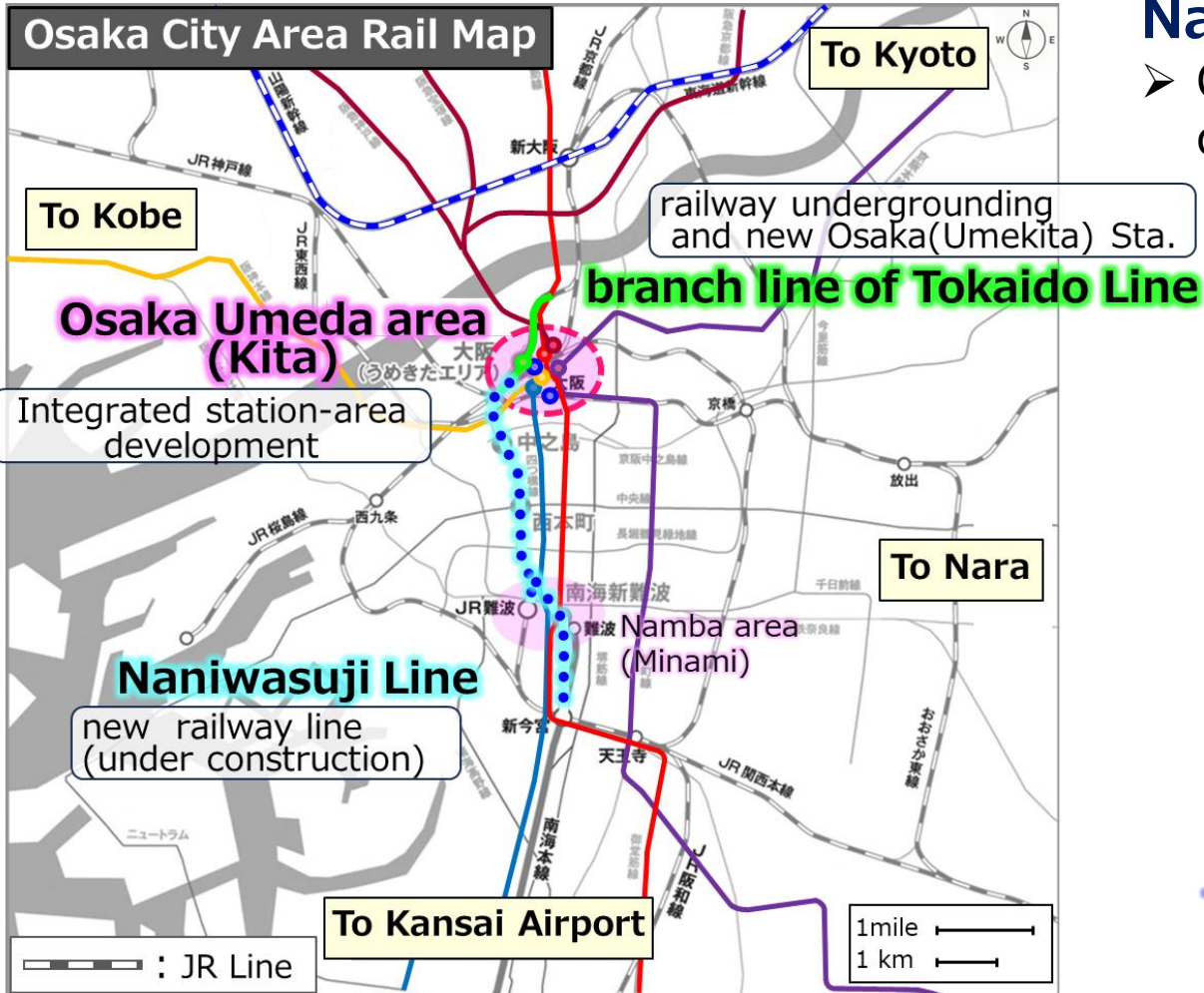
Line relocated underground and new station built: Opened in 2023

- Relocated freight station and moved railway underground to create large development site
- Established new station for express access to international airport



Naniwasuji Line to open in 2031

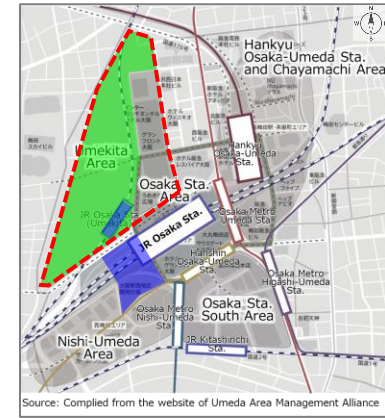
- Construction underway on subway line connecting central Osaka and Umekita



Creating quality urban spaces through large city park + innovation hub + pedestrian-only pathways

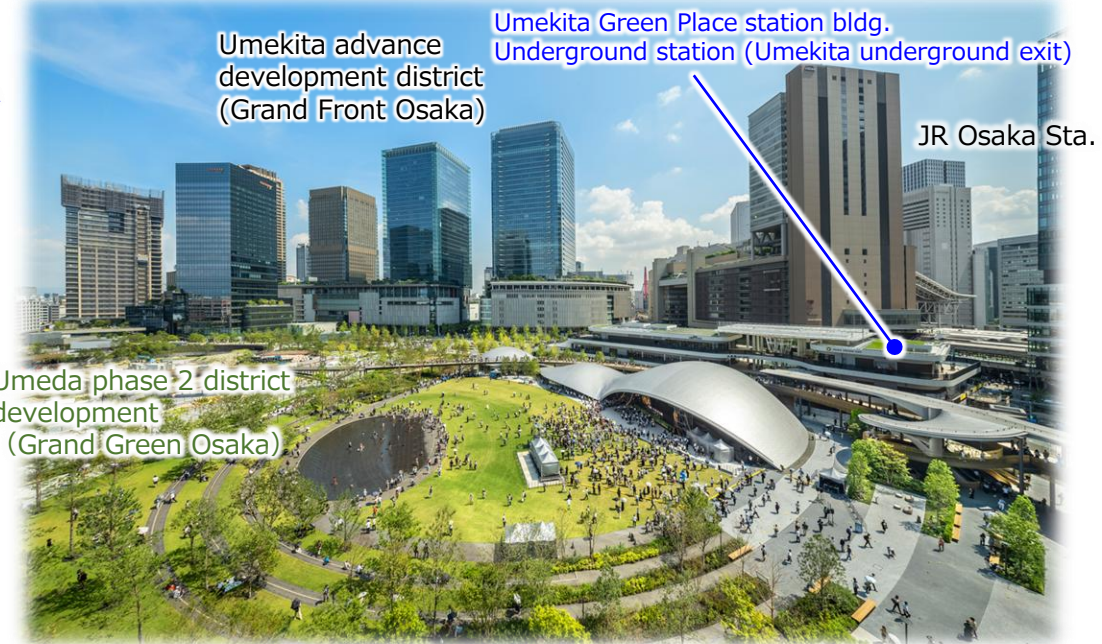
- ⇒ • Revitalizing economic activity by attracting private investment
- Raising real estate value across the surrounding area

Umekita phase 2 district development (Grand Green Osaka) opened in advance in 2024 [other developer]



Osaka Sta. West area development opened in 2024

- Three station buildings directly connected to new ticket gates serving as gateway to west side area including Umekita phase 2 development



- **Osaka Umeda area, where railway operators played a pioneering role in developing a neighborhood centered around the station**
- **Station that integrates urban functions and forms a walkable space merged with surrounding neighborhood**
- **Transportation infrastructure developed in tandem with urban development plans, enhancing access to international airport and Osaka city center**
- **Economic revitalization and increased real estate value through development of quality urban spaces**

⇒ **The Osaka Umeda area is a hub of interaction, boasting unparalleled convenience in Japan, where quality urban spaces and diverse urban functions converge.**

- **Japan's railways are more than just a means of transportation. They are urban apparatus where urban planning and transportation policy are inseparably linked.**
- **Japanese-style TOD continues to sustainably generate diverse human activities, interactions, employment, and economic activity in many cities, bringing value to the city and society.**



**We look forward to
Seeing in Japan!**

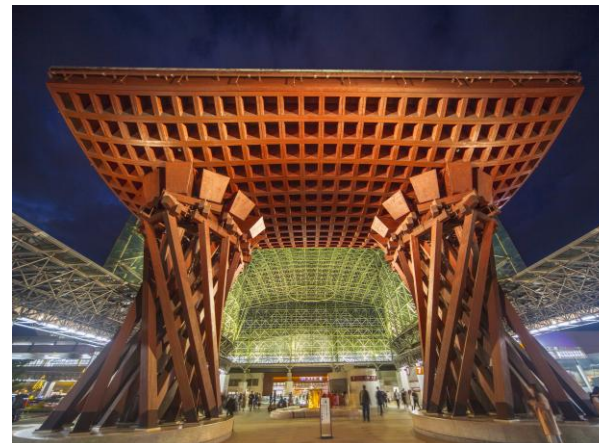


Photo Credit: Wakayama Tourism Federation

Photo provided by: Kanazawa City

Visitor Population

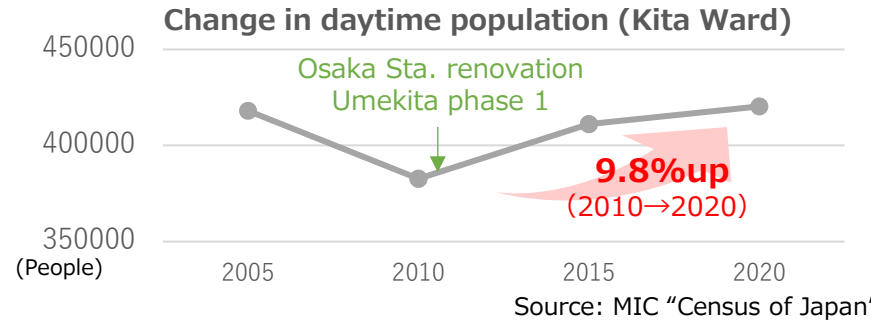


Daytime Population (Kita Ward, Osaka City)

Population increasing with growth as an extended-stay hub for interactions, even as Japan's total population declines

Total Overnight Visitors (Osaka City)

Approx. 40 million (2019) ⇒ Approx. 51 million (2024)



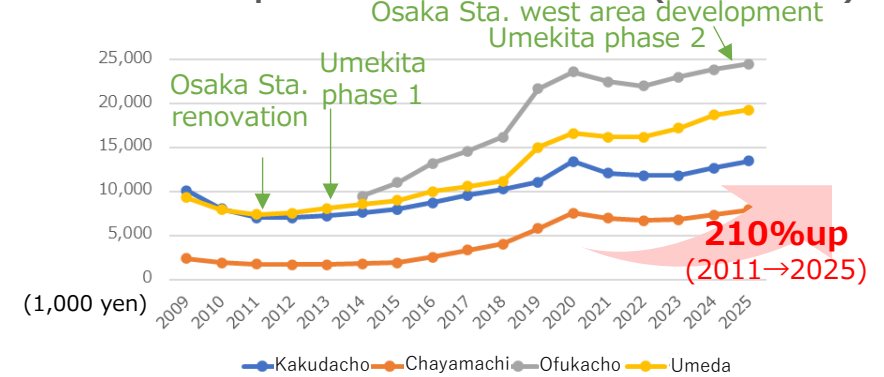
Economic Impact



Land Prices (Around Osaka Sta.)

Rising in tandem with results and expectations of redevelopment

Official land prices around Osaka Sta. (as of Jan. 1)



Innovation



Economic Assets

Incubation hub **Knowledge Capital, U-FINO**
Diverse functions (MICE, hotel, commercial, etc.)

Physical Assets

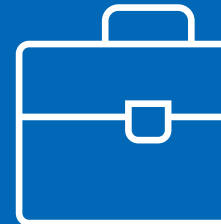
Public spaces (plazas, streets, etc.) **Umekita Park**
Diverse offices **JAM BASE**
Walkable environment **pedestrian deck**
Innovation Ecosystem

Networking Assets

Events & workshops **area management**
Networking program **U-FINO**

Source: The Rise of Innovation Districts (Brookings Institution)

Business & Employment



Nominal GRP (Osaka Pref.)

Since 2010, growth has resumed to record levels after overcoming stagnation caused by COVID-19

Employees (Osaka City)

Approx. 2.2 million (2016) ⇒ Approx. 2.3 million (2020)

