

JITTI Civil Aviation Symposium 2025

March 26, 2025

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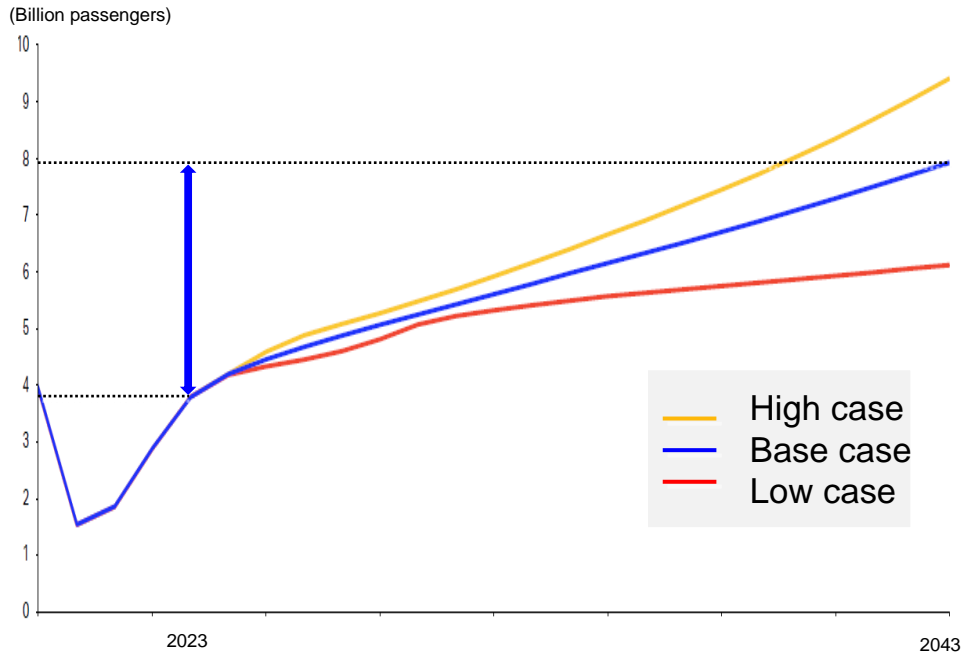
Narita Airport

Connecting Japan to the World

Asia Pacific Region driving the boosting demand

- According to the forecast by IATA,
 - ✓ **Aviation demand will double** over the next 20 years
 - ✓ The driving force will be **the Asia Pacific Region**

Growth in global aviation demand



Increase in the number of passengers by region

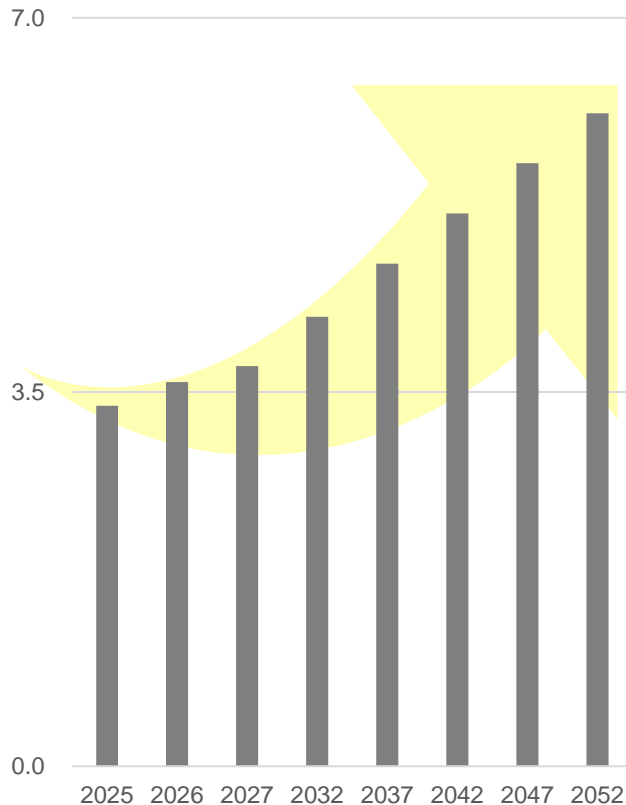
Region	Compound annual growth rate (2023–2043)	Additional passengers by 2043 (million passengers)
Africa	3.7%	182
Asia Pacific	5.1%	2,609
Europe	2.3%	662
Middle East	4.1%	314
North America	3.0%	763
Latin America	3.0%	200
World	3.8%	4,138

Source: Global Outlook for Air Transport (Dec. 2024), IATA.

Demand in Japan is expected to grow stably

- According to the forecast by the ACI,
 - ✓ **Aviation demand** in Japan is expected to **increase** even while the population declines,
 - ✓ and **keep a high position** in the world

Changes in aviation demand in Japan



Forecast of the ranking of the global number of passengers

Top 20 markets by total passenger traffic volume							
Rank	2023	2027	2032	2037	2042	2047	2052
1	United States	United States	United States	China	China	China	China
2	China	China	China	United States	United States	United States	United States
3	India	India	India	India	India	India	India
4	Spain	Japan	Spain	Indonesia	Indonesia	Indonesia	Indonesia
5	United Kingdom	Spain	Japan	Spain	Spain	Spain	Spain
6	Japan	United Kingdom	United Kingdom	Japan	Japan	Turkey	Turkey
7	Turkey	Turkey	Indonesia	United Kingdom	Turkey	Japan	Japan
8	Brazil	Russian Federation	Turkey	Turkey	United Kingdom	United Kingdom	United Kingdom
9	Italy	Indonesia	Russian Federation	Russian Federation	Russian Federation	Thailand	Thailand
10	Germany	Germany	Brazil	Brazil	Thailand	Russian Federation	Vietnam

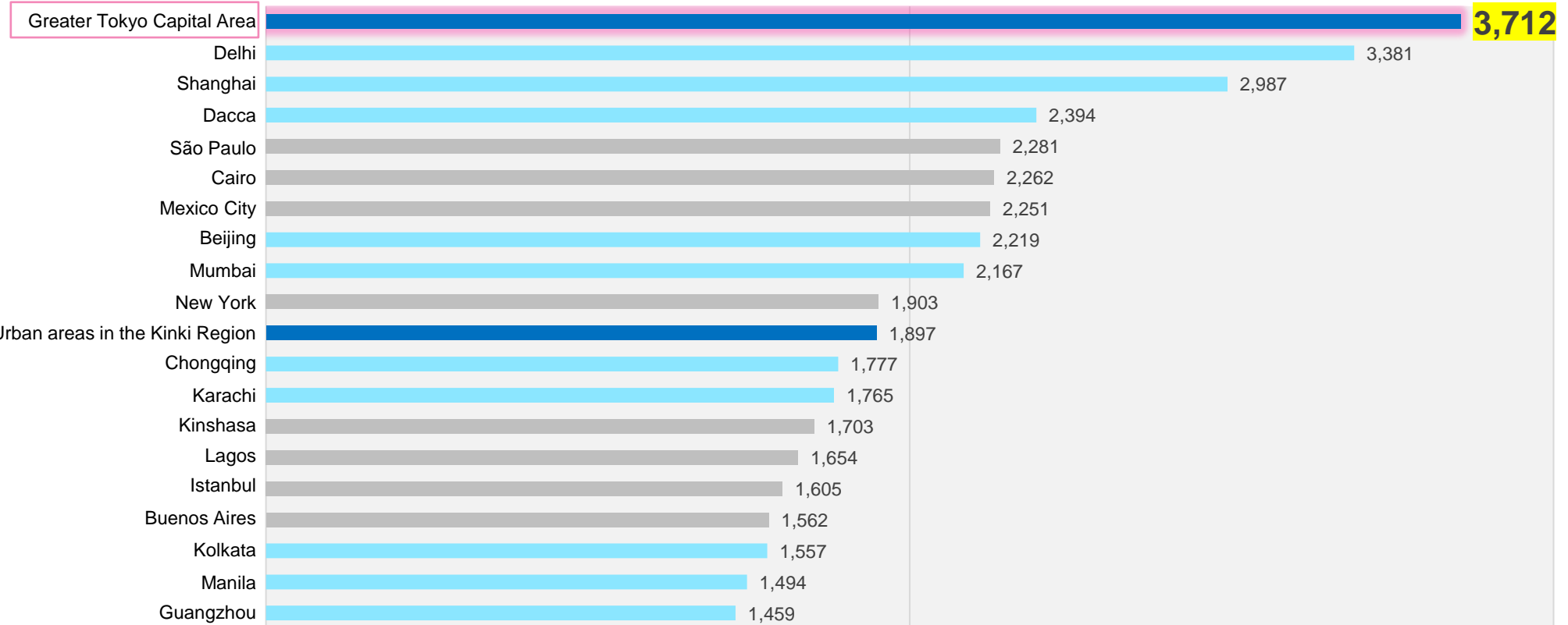
Source: ACI World Airport Traffic Forecasts 2023-2052, ACI.

Greater Tokyo ranks top for urban population

■ **The Population** in urban areas in Japan, especially in **the Greater Tokyo Capital Area**, is **the largest in the world**

Ranking of urban populations around the world

(10,000 people)

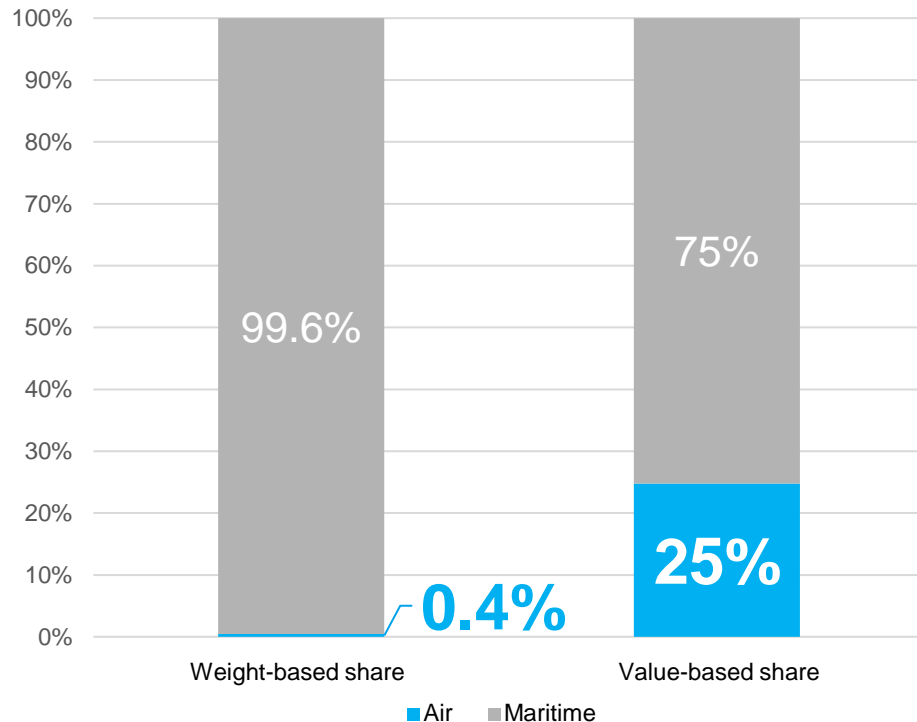


Prepared from World Population Prospects 2024, United Nations <<https://population.un.org/wpp>>.

Positioning of Narita Airport for cargo in Japan

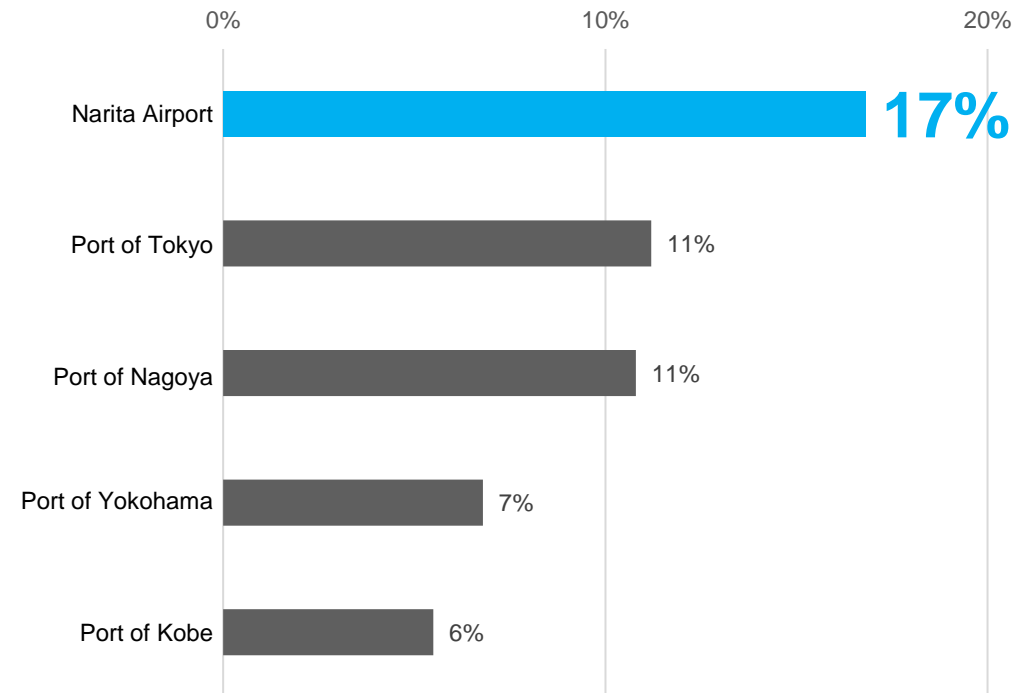
- ✓ Narita Airport is **the largest trading port in Japan** among air and sea ports.
- ✓ **The added value of Narita Airport as a trading port is very high** due to the concentration of forwarders in neighboring areas.

Top five ports in Japan in terms of the total value of cargo handled (seaport/airport)_2024



Trade Statistics of Japan (provisional figures for 2024), Ministry of Finance, <https://www.customs.go.jp/toukei/info/>.
Regarding the maritime weight-based data, figures for 2023 are used.

Top five ports in Japan in terms of the total value of cargo handled (seaport/airport)_2024



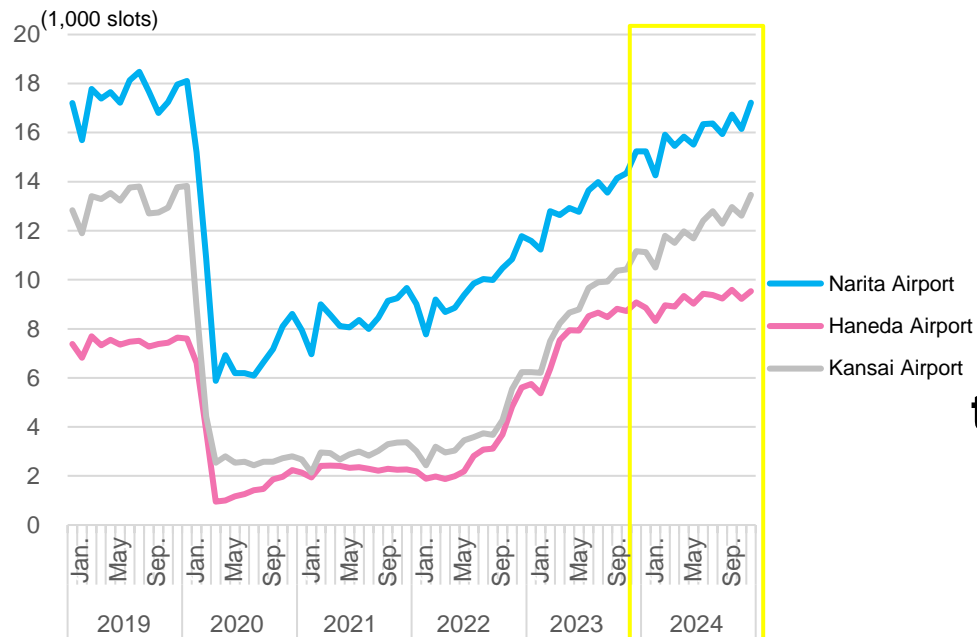
Source: Trade Statistics of Japan (provisional figures for 2024), Ministry of Finance, <https://www.customs.go.jp/toukei/info/>.

Important role of Narita Airport for functional enhancement

- Functional enhancement of the Greater Tokyo Capital Area airports is essential.

However, there is limited room for expansion at Tokyo metropolitan area.

Changes in the number of the arrival/departure slots of international flights



It is the role of

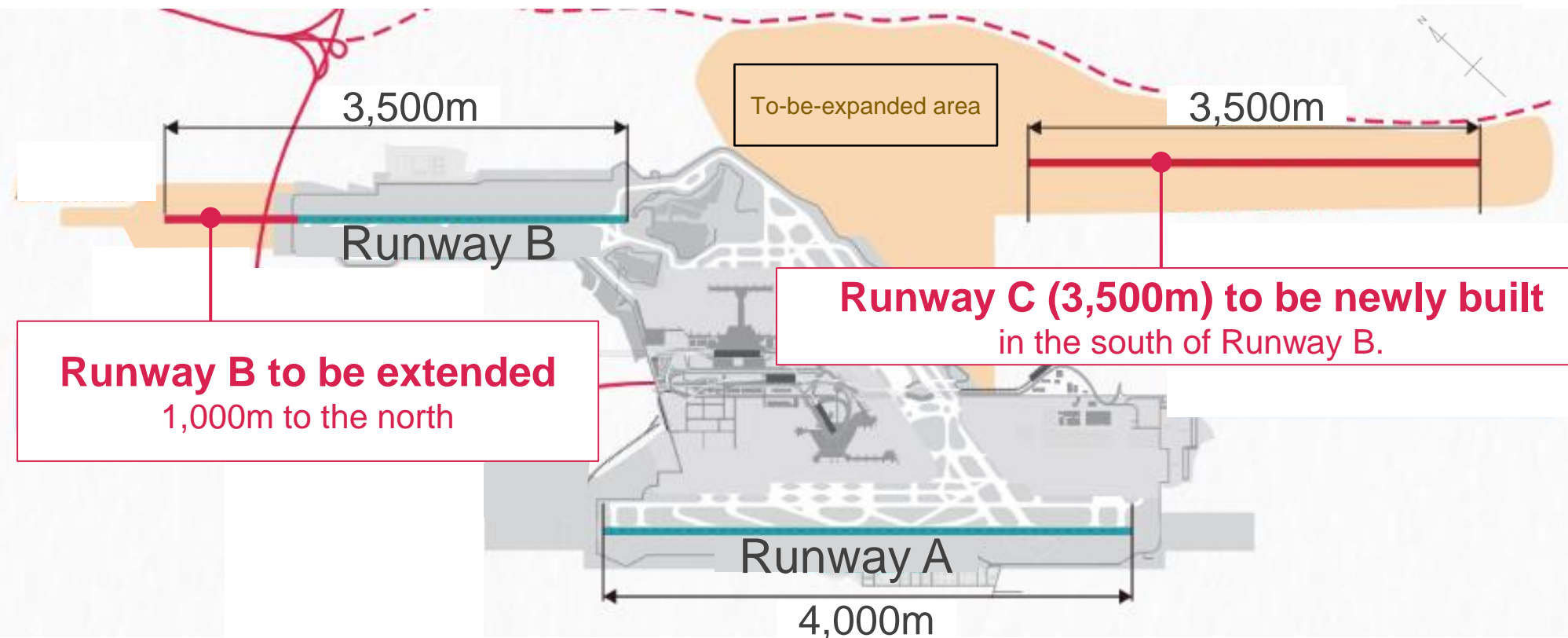
Narita Airport

to accommodate the increased demand in the future

"Further functional enhancement" as a National Project

■ Development of new Runway C, extension of Runway B, and extension of operating hours

- ✓ Annual arrival and departure slots:
300,000 slots (340,000 slots scheduled from the winter flight schedule) → **500,000 slots**
- ✓ Number of passengers: 40 million passengers → **75 million passengers**
- ✓ Cargo traffic volume: 2 million tons → **3.5 million tons**

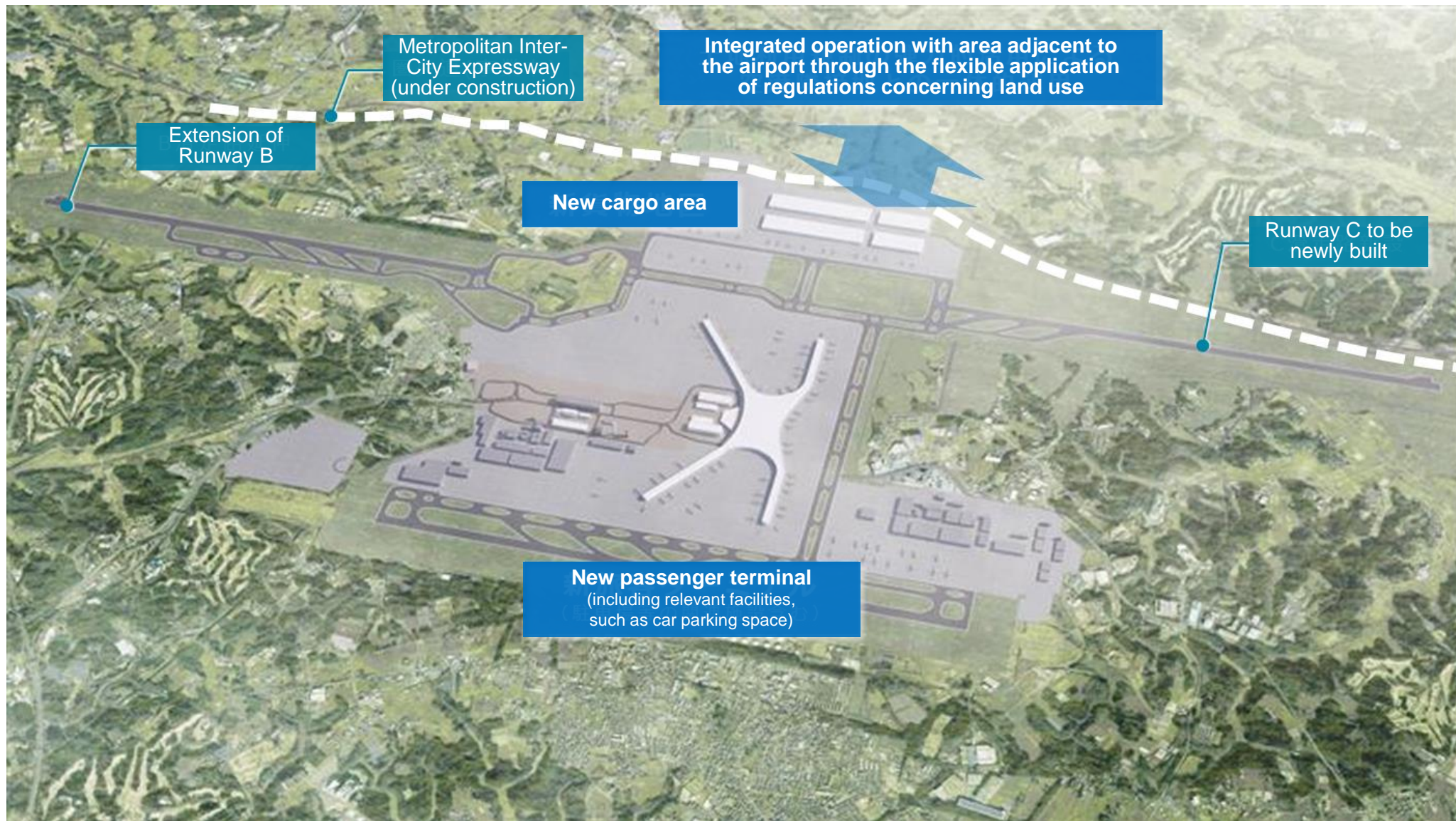


Runway B to be extended
1,000m to the north

Runway C (3,500m) to be newly built
in the south of Runway B.

1. Phasing development and transition of passenger terminal
2. Improving efficiency of logistics functions through consolidation and automation
3. Airport access improvement
4. Development of Airport City by collaborating with local communities

New Narita Airport Development Plan





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