

## **The Market of 17 Categories of Logistics Industry in Japan: Key Research Findings 2015**

### ◆ Research Outline

**Yano Research Institute has conducted a research on the domestic market of 17 categories of logistics industry with the following conditions:**

1. Research period: November 2014 to March 2015
2. Research target: Domestic leading logistics companies and organizations
3. Research methodologies: Face-to-face interviews by the expert researchers, questionnaire via telephone, statistical data and literature research.

#### **<What are 17 Categories of Logistics Industry? >**

The logistics is the process of planning, implementing, and controlling the effective and efficient flow of goods and services from the point of origin to the point of consumption.

17 categories of logistics industry include shipping, integrated logistics system, domestic home delivery, special loading motor truck transportation of LTL, free warehouse, freight forwarding, general port transport, frozen/refrigerated warehouse, moving business, air cargo transport, railway transport, light freight delivery, international parcel delivery, trunk rooms and peripheral business, motorcycle courier service, and delivery agent system.

#### **<What is an Integrated Logistics System?>**

The integrated logistics system in this research indicates an outsourcing service that integrates planning, control, realization, and monitoring of a part of or entire product flow at the client company. Joint delivery, 3PL (Third Party Logistics), and other logistics services that provide consultations as a part of the service for improving delivery efficiency and cost are also the targets of this research.

### ◆ Key Findings

#### **■ The Domestic Market Size of 17 Categories of Logistics Industry in FY2013 Attained 19.755 Billion Yen, 105.5% of the Size of Preceding Year**

The domestic market size of 17 logistics categories grew to 19.755 billion yen, 105.5% of the size of the previous fiscal year. This stemmed from the last-minute surge of demands before consumption tax increase, the full recovery from the Great East Japan Earthquake, and rising demands for cold foods at CVS and mail-order markets.

#### **■ The Categories “Integrated Logistics System” and “Free Warehouse” Showed Most Conspicuous Rise**

Among the 17 categories of logistics, those that showed remarkable growth are “integrated logistics system” and “free warehouse.” Whereas the size of the integrated logistics system market in FY2013 attained 3,900 billion yen, 118.2% from the size of FY2008, the free warehouse market size in FY2013 reached 2 trillion yen, 117.6% of the size in FY2008. The both markets respectively expanded remarkably.

■ **Increase of Strategic M&A Aiming for Business Enhancement and Globalization**

Unlike those M&A cases in the past occurred when a company or its group company falls into financial difficulties, the recent increasing cases of M&A in the logistics industry are more strategic, aiming for enhancing business of the expanding areas, like logistics of low-temperature foods, or to cope with rapidly expanding globalization of logistics. The both two companies concerned in such M&A attempt to strengthen competitiveness by making up the deficiency and gaining advantages from each other. Those cases with successful results are attracting attention.

◆ **Report format:**

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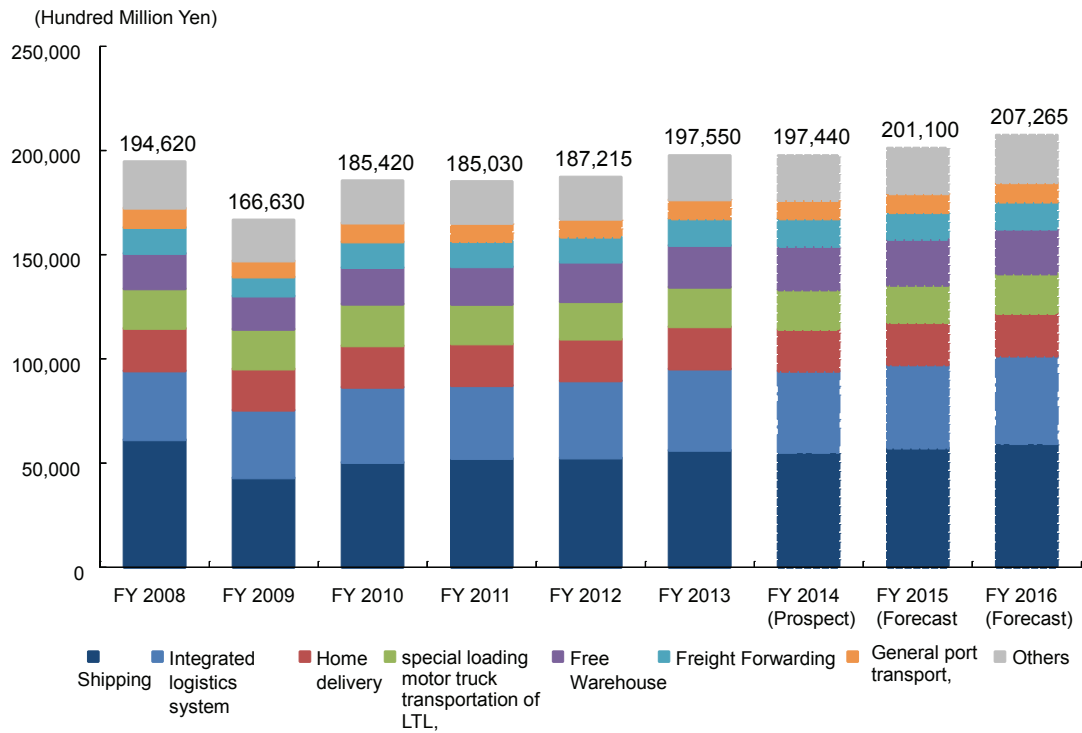
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■ **Table 1: Forecast and Transition of 17 Categories of Logistics Market Size**

Category	FY 2008	FY 2009	FY 2010	FY 2011	FY 2012	FY 2013	FY 2014 (Prospect)	FY 2015 (Forecast)	FY 2016 (Forecast)
Shipping	61,300	43,000	50,500	52,300	52,500	56,300	55,200	57,300	59,500
Y-o-Y Comp.	92.9%	70.1%	117.4%	103.6%	100.4%	107.2%	98.0%	103.8%	103.8%
Integrated Logistics System	33,000	32,500	36,000	35,000	37,000	39,000	39,000	40,000	42,000
Y-o-Y Comp.	97.1%	98.5%	110.8%	97.2%	105.7%	105.4%	100.0%	102.6%	105.0%
Domestic Home Delivery	20,400	19,800	19,900	20,000	20,100	20,250	20,000	20,200	20,400
Y-o-Y Comp.	100.5%	97.1%	100.5%	100.5%	100.5%	100.7%	98.8%	101.0%	101.0%
Free Warehouse	17,000	16,000	17,500	18,000	19,000	20,000	21,000	22,000	21,500
Y-o-Y Comp.	113.3%	94.1%	109.4%	102.9%	105.6%	105.3%	105.0%	104.8%	97.7%
Special Loading Truck Transportation	19,000	19,000	20,000	19,000	18,000	19,000	19,000	18,000	19,000
Y-o-Y Comp.	90.5%	100.0%	105.3%	95.0%	94.7%	105.6%	100.0%	94.7%	105.6%
Freight Forwarding	12,500	9,100	12,400	12,100	11,900	12,700	13,000	12,800	12,900
Y-o-Y Comp.	94.7%	72.8%	136.3%	97.6%	98.3%	106.7%	102.4%	98.5%	100.8%
Port Transport	9,200	7,700	9,000	8,800	8,600	9,100	9,000	9,000	9,400
Y-o-Y Comp.	100.0%	83.7%	116.9%	97.8%	97.7%	105.8%	98.9%	100.0%	104.4%
Others	22,220	19,530	20,120	19,830	20,115	21,200	21,240	21,800	22,565
Y-o-Y Comp.	96.8%	87.9%	103.0%	98.6%	101.4%	105.4%	100.2%	102.6%	103.5%
<b>Total Market Size (Total 17 Categories)</b>	<b>194,620</b>	<b>166,630</b>	<b>185,420</b>	<b>185,030</b>	<b>187,215</b>	<b>197,550</b>	<b>197,440</b>	<b>201,100</b>	<b>207,265</b>
Y-o-Y Comp.	96.5%	85.6%	111.3%	99.8%	101.2%	105.5%	99.9%	101.9%	103.1%

■ **Figure 1: Forecast and Transition of 17 Categories of Logistics Market Size**



Notes:

1. The figures are based on the net sales of businesses, including transportation fees, storage fees, stevedorage, and other related expenses.
2. 17 categories of logistics industry include shipping, integrated logistics system, domestic home delivery, special loading motor truck transportation of LTL, free warehouse, freight forwarding, general port transport, frozen/refrigerated warehouse, moving business, air cargo transport, railway transport, light freight delivery, international parcel delivery, trunk rooms and peripheral business, motorcycle courier service, and delivery agent system.