

17 Categories of Logistics Industry in Japan: Key Research Findings 2017

◆ Research Outline

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

1. Research period: December 2016 to March 2017
2. Research target: Domestic leading logistics companies and organizations
3. Research methodologies: Face-to-face interviews by the expert researchers, questionnaire via telephone, and literature research, including surveys using statistical data

<What are 17 Categories of Logistics Industry? >

17 categories of logistics industry include such business as shipping, integrated logistics system, domestic home delivery, special loading motor truck transportation, free warehouse, freight forwarding, freight broker, refrigerated warehouse, moving business, airfreight forwarding, railway freight forwarding, light freight delivery, international parcel delivery, rail freight transportation, trunk rooms and peripheral business, motorcycle courier, and consigned delivery.

<What is an Integrated Logistics System?>

The integrated logistics system in this research indicates an outsourcing service that integrates all the logistics for specific clients. In addition to joint delivery and 3PL (Third Party Logistics), all the project proposals by forwarders are the target of this research.

◆ Key Findings

■ 17 Categories of Logistics Industry in FY2015 Attained 20,411 Billion Yen, 99.1% on Y-o-Y Basis, Projected to Decrease to 19,597 Billion Yen in FY2016, 96.0% on Y-o-Y

The total size of 17 categories of logistics industry was estimated as 20,411 billion yen in FY2015, 99.1% of the size of previous fiscal year. The domestic logistics market as a whole was relatively stable, but slowdown of overseas demand in recent years has affected the entire industry to decline. Because this tendency of stagnant overseas demand in spite of the steady domestic market is likely to continue, the size of 17 categories in FY2016 is projected to be 19,597 billion yen, 96.0% on year-over-year basis.

■ With Labor Shortage Being Challenge for Logistics Industry, Signs Toward Smart Logistics May Become Silver Lining

Businesses involved with logistics have become more and more specific to the category of what they do, while at the same time they are required to develop complexed logistics services. In order to pursue their specific sphere of interest, there have been mergers, acquisitions, and business alliances across the industry, together with such reforms as creating logistics platforms through integrated information services aiming for efficient logistics.

In addition, as labor shortage in the industry having been a social problem, there is a sign of the industry intending to shift to “smart logistics” by introducing IoT (Internet of Things) and AI (Artificial Intelligence) to labor-save and automate the logistic tasks.

◆ **Report Format**

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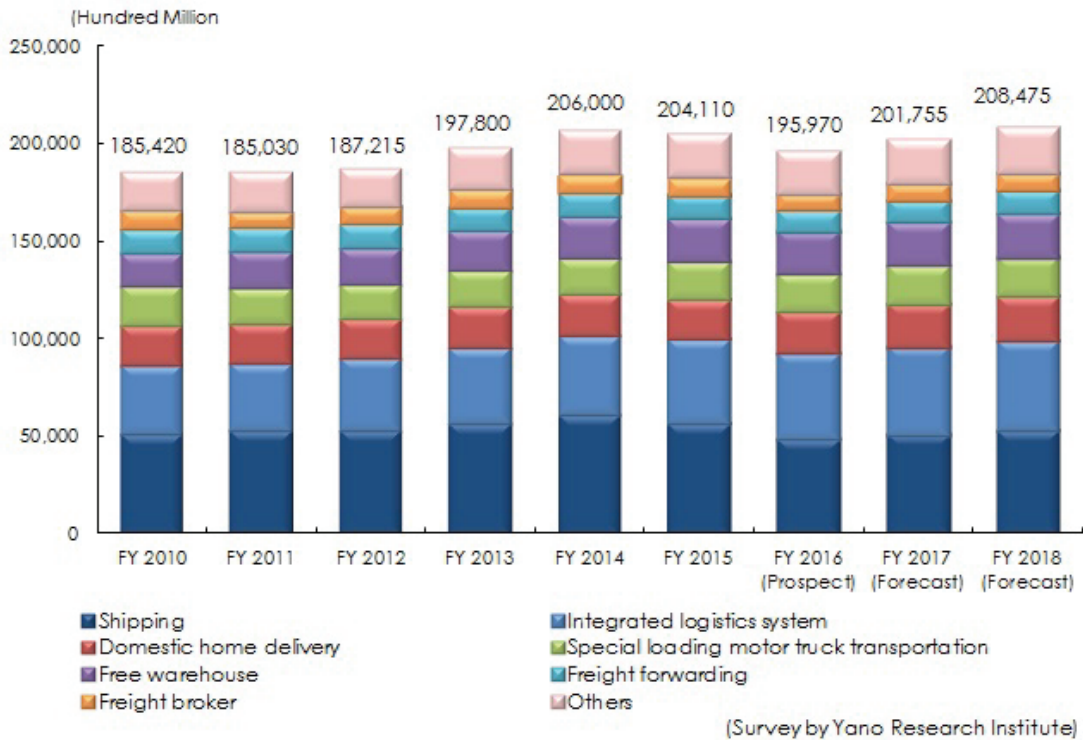
Contacts: Public Relations

Yano Research Institute Ltd. (URL: <http://www.yanoresearch.com>)

Phone: +81-3-5371-6912

E-mail: press@yano.co.jp

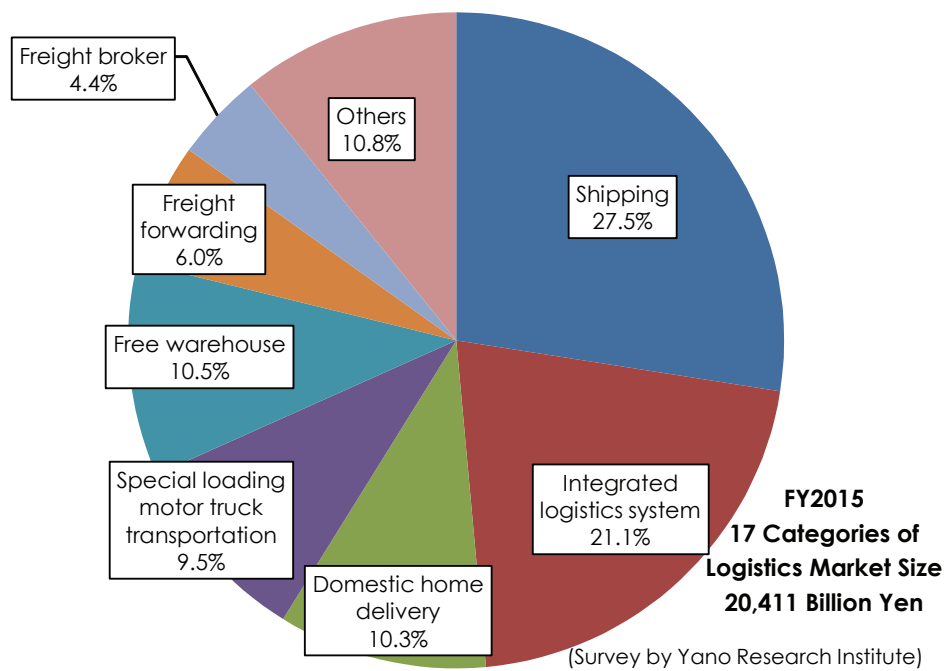
■ **Figure 1: Forecast and Transition of 17 Categories of Logistics Market Size**



Notes:

1. The market size is based on the sales of businesses, including transportation fees, storage fees, stevedorage, and other related expenses.
2. “Others” include refrigerated warehouse, moving business, airfreight forwarding, railway freight forwarding, light freight delivery, international parcel delivery, rail freight transportation, trunk rooms and peripheral business, motorcycle courier, and consigned delivery.

■ **Figure 2: Composition Ratio of Logistics Market in FY2015 by 17 Category**



Notes:

3. The market size is based on the sales of businesses, including transportation fees, storage fees, stevedorage, and other related expenses.
4. "Others" include refrigerated warehouse, moving business, airfreight forwarding, railway freight forwarding, light freight delivery, international parcel delivery, rail freight transportation, trunk rooms and peripheral business, motorcycle courier, and consigned delivery.