

# **Vision for the Next 10 Years at Narita Airport**



**26 May, 2008**

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**Executive Officer**

**Vice President, Planning Department**

**Narita International Airport Corporation (NAA)**

◆ Part 1

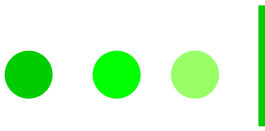
Narita Airport Today 【Airport operations】 : 3

◆ Part 2

Airports in Japan Today and Recent Developments : 13  
at Tokyo Airports

◆ Part 3

Future Concept for Narita Airport 10 Years Ahead : 31  
【Future Initiatives】



# **Part 1** Narita Airport Today

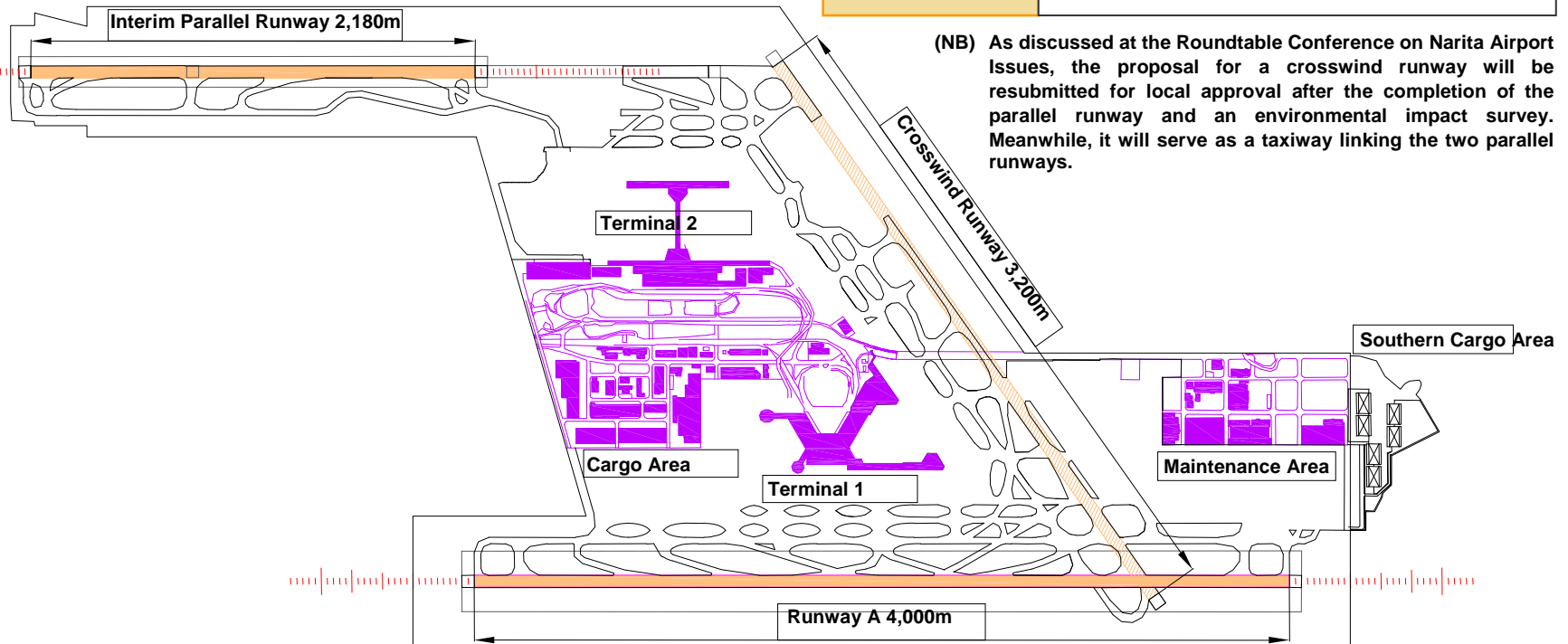
## **【Airport operations】**

# Narita Airport Facilities



Bearing

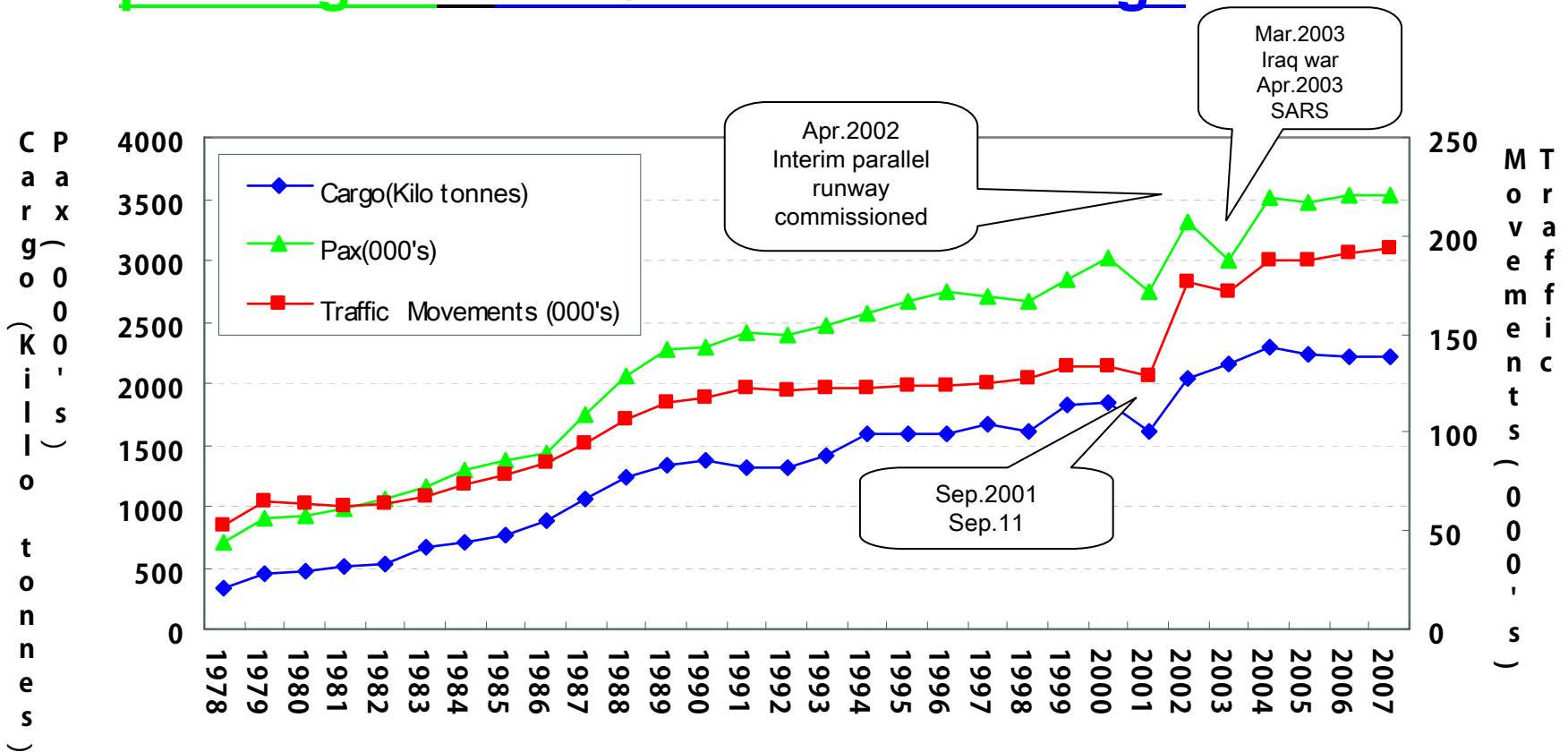
Category	Now	After Completion
Runway	4,000m X 1	4,000m X 1
	2,180m X 1 Inereim(Parallel)Runway	2,500m X 1
		3,200m (NB) X 1
Passenger Terminal	Terminal 1 Terminal 2	



(NB) As discussed at the Roundtable Conference on Narita Airport Issues, the proposal for a crosswind runway will be resubmitted for local approval after the completion of the parallel runway and an environmental impact survey. Meanwhile, it will serve as a taxiway linking the two parallel runways.

# Figures for Narita International Airport (1978-2007)

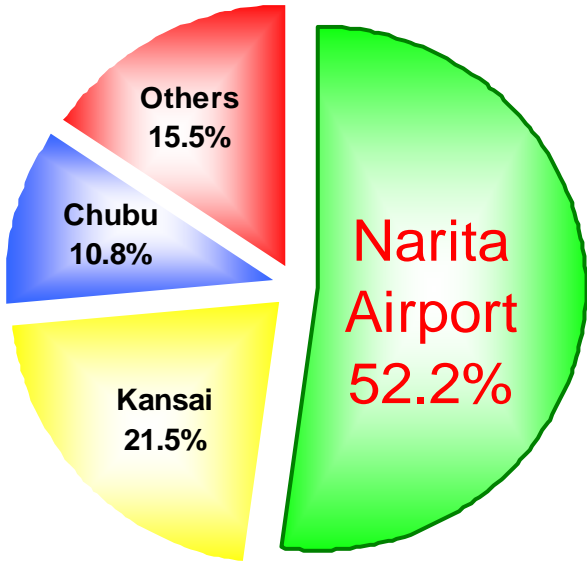
Narita Airport handles **3.6 times more traffic movements** than when it first opened, **5 times more passengers** and **6.4 times more cargo**.



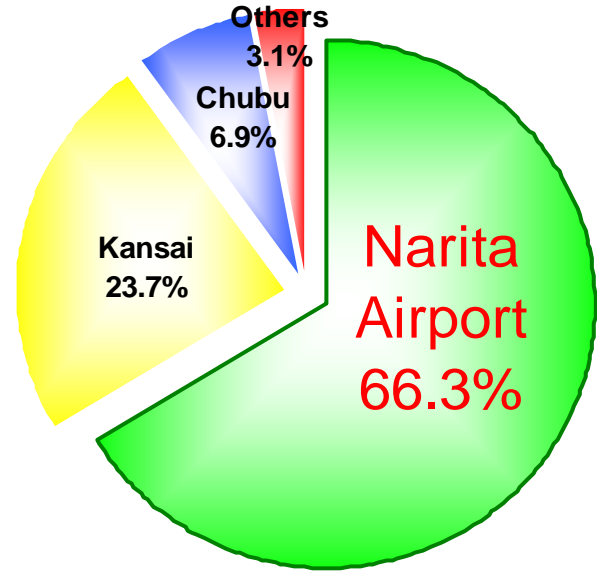


# Narita's Share of International Passengers, Cargo & Traffic Movements

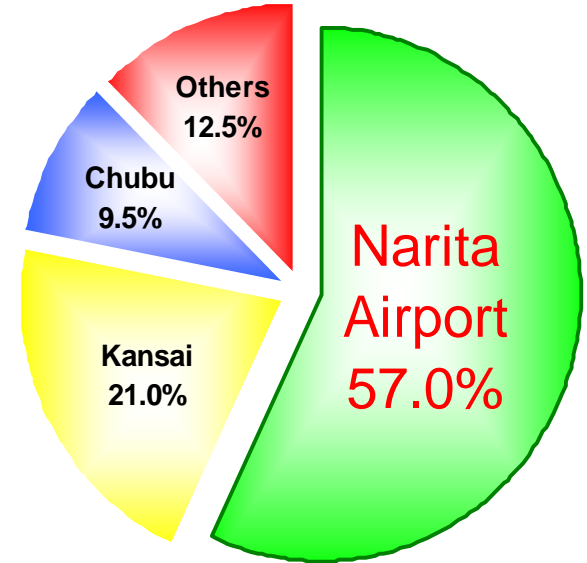
## Passengers



## Cargo



## Traffic Movements



Narita is ranked No. 1 in Japan

# Dynamic Economic Region Supporting Narita

## Japan's economic strength

Countries	GDP (millions of US dollars)
US	13,163,870
<b>Japan</b>	<b>4,368,435</b>
Germany	2,896,876
China	2,644,681
UK	2,376,984
France	2,248,091
Italy	1,850,961
Canada	1,271,593
Spain	1,224,676
Brazil	1,067,472
Total	33,113,639
Worldwide	48,461,854

Greater Tokyo Area:  
1,577,138

Source:

World Development Indicators database; World Bank(2006),  
Gross Prefectural Product Report; Cabinet Office(2005)

# Narita Airport Network

## Destinations (International)

**36 nations, 2 territories (96 cities)**

**1,725 flights/week**

\* 2008 summer schedule



## Destinations (domestic)

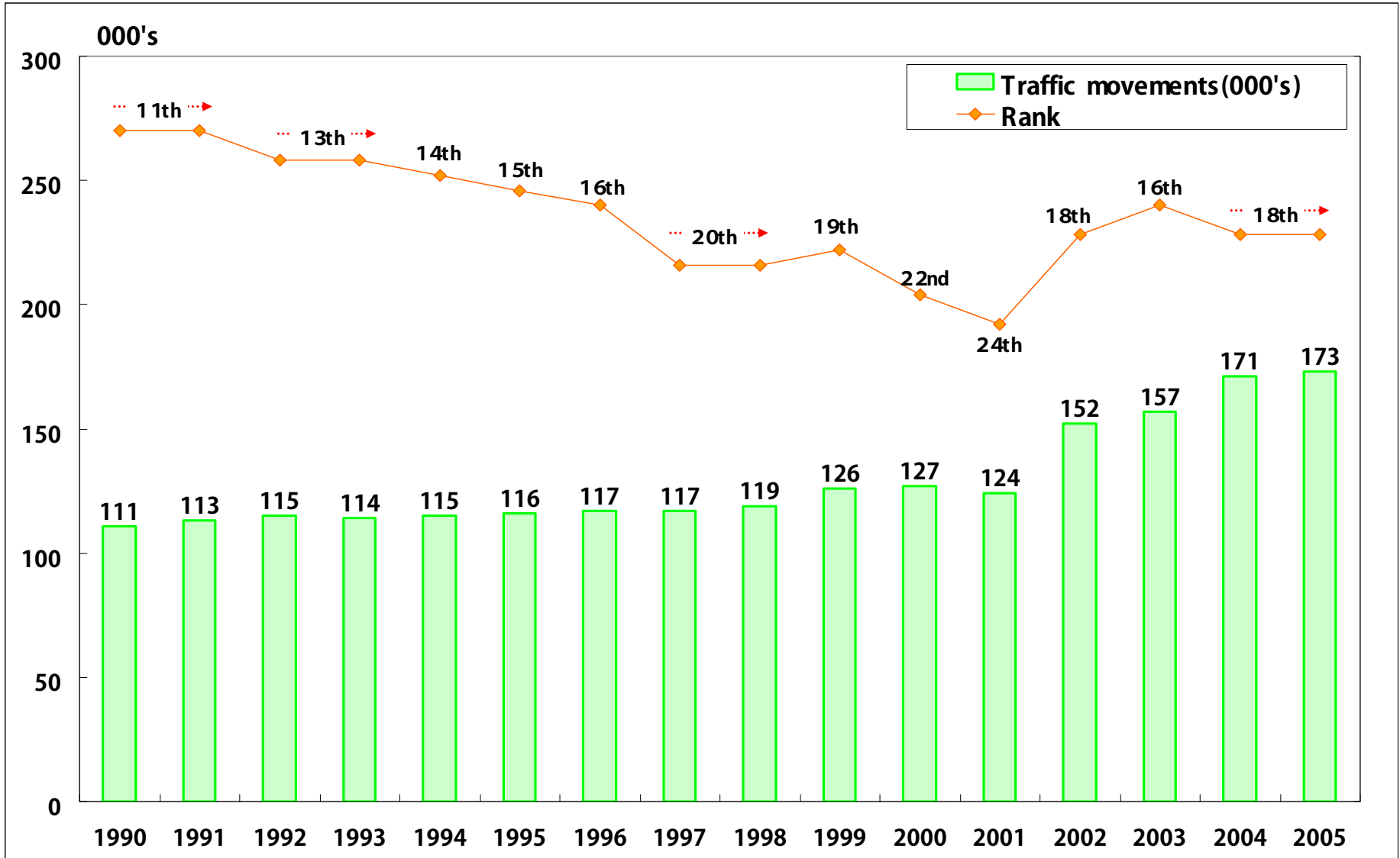
**Cities:** Sapporo, Komatsu, Sendai, Chubu, Osaka, Hiroshima, Fukuoka, Naha

**8 cities, 126 flights/week**

\* As of April 2008



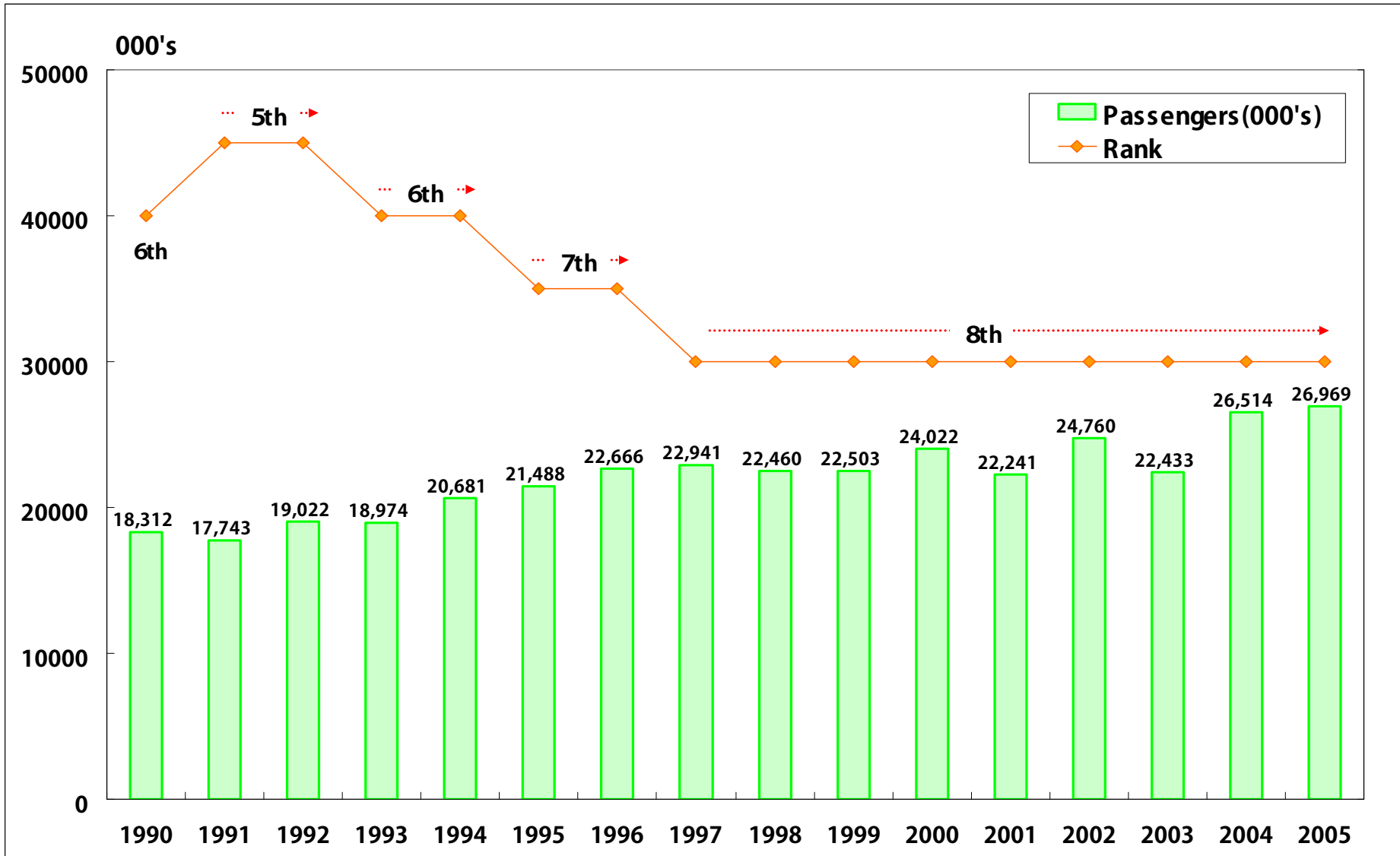
# Traffic Movements Global Ranking (International)



Source : ICAO Statistics

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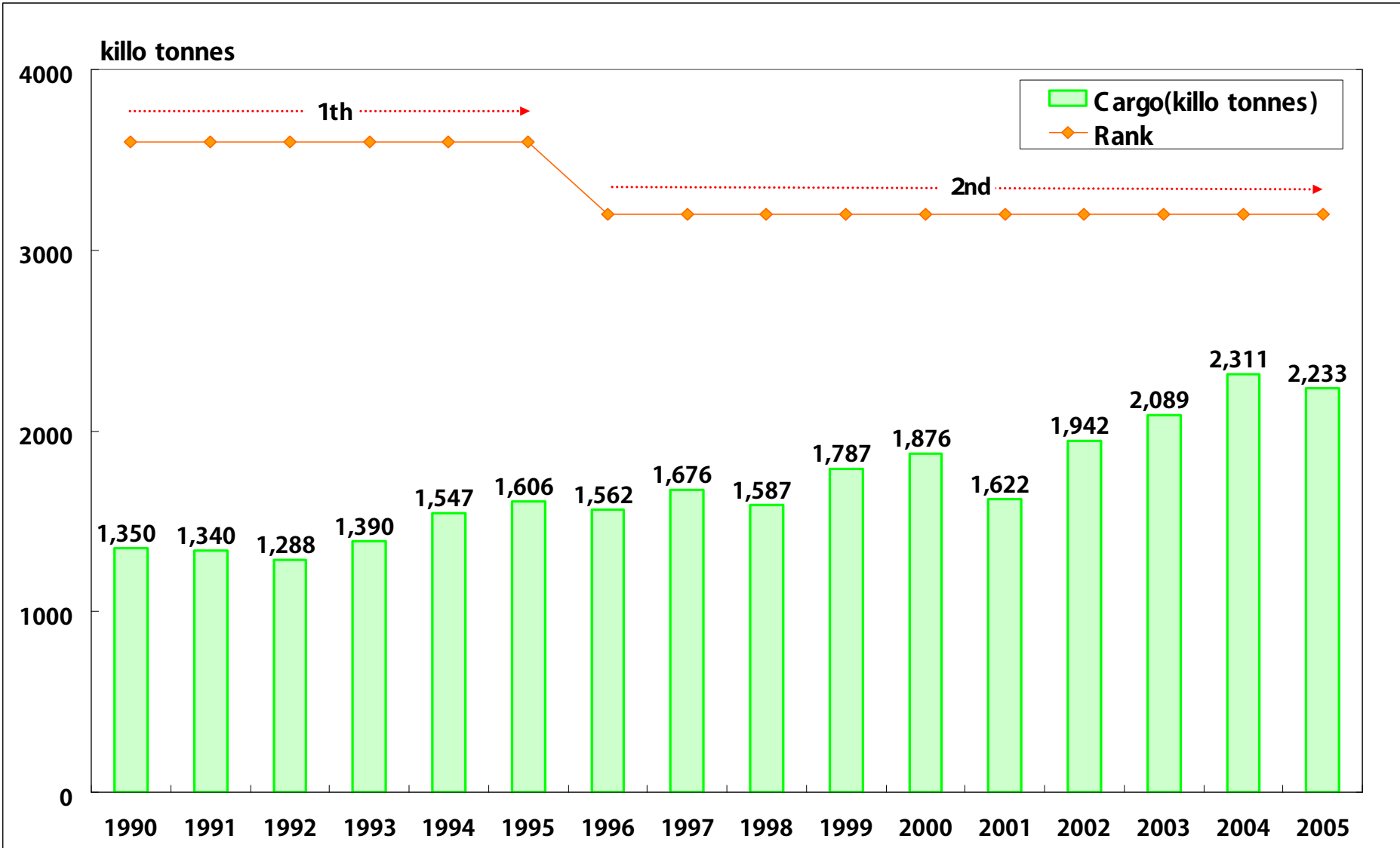
# Passengers Global Ranking (International)



Source : ICAO Statistics

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# Cargo Global Ranking (International)



Source : ICAO Statistics

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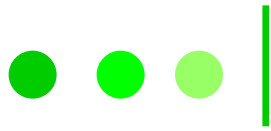
# Narita's Advantages and Disadvantages

## Narita's **Advantages**

- 😊 Strong demand in Tokyo area
- 😊 Extensive network
- 😊 No. 1 share in Japan
- 😊 Environment and Community
- 😊 e-airport Project

## Narita's **Disadvantages**

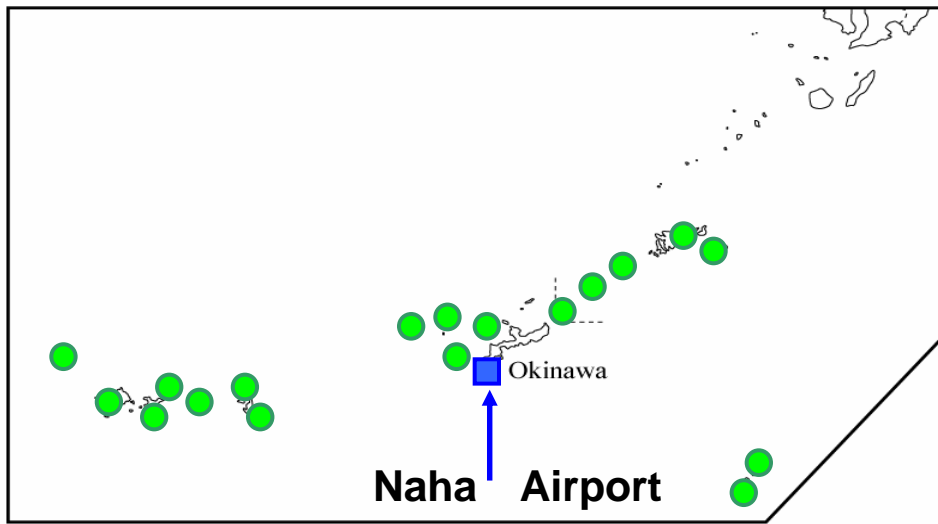
- ☹ Slot restrictions
- ☹ Curfew
- ☹ Access from central Tokyo



## **Part 2**

# **Airports in Japan Today and Recent Developments at Tokyo Airports**

# Airports in Japan



**Chitose Airport**



Hokkaido

**Osaka Airport**



**Fukuoka Airport**



**Japan**

**Tokyo**

**Kansai Airport**

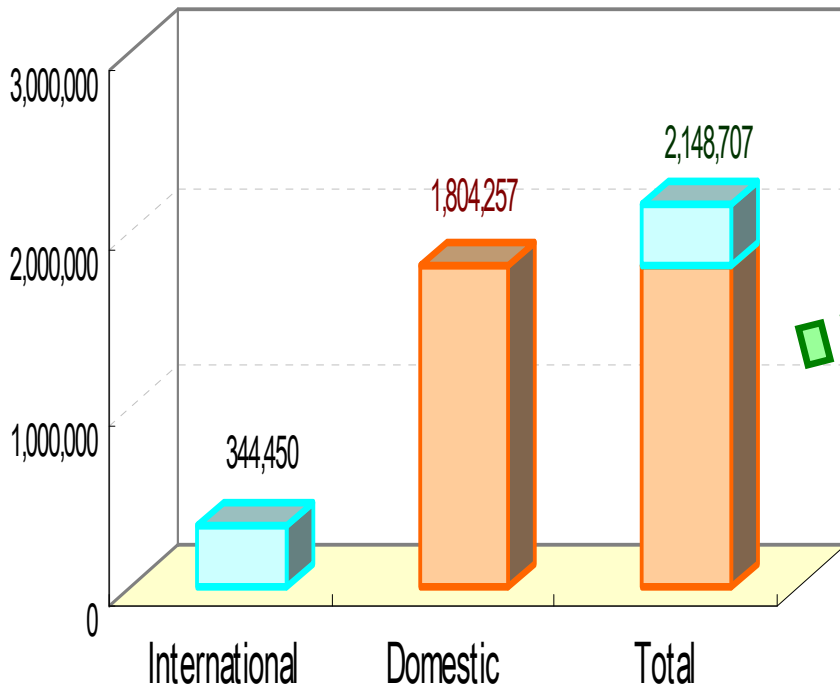
**Chubu Airport**

**Narita Airport**

**Haneda Airport**

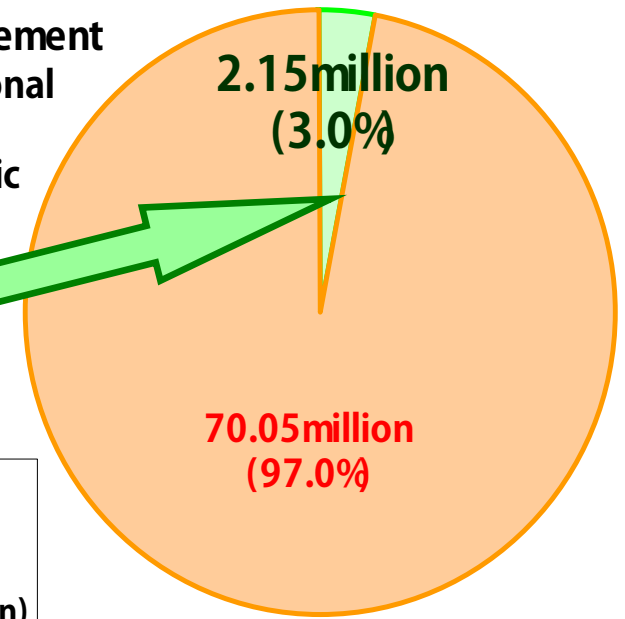
# Traffic Movements (World and Japan) - 2006

Traffic movements(Japan)



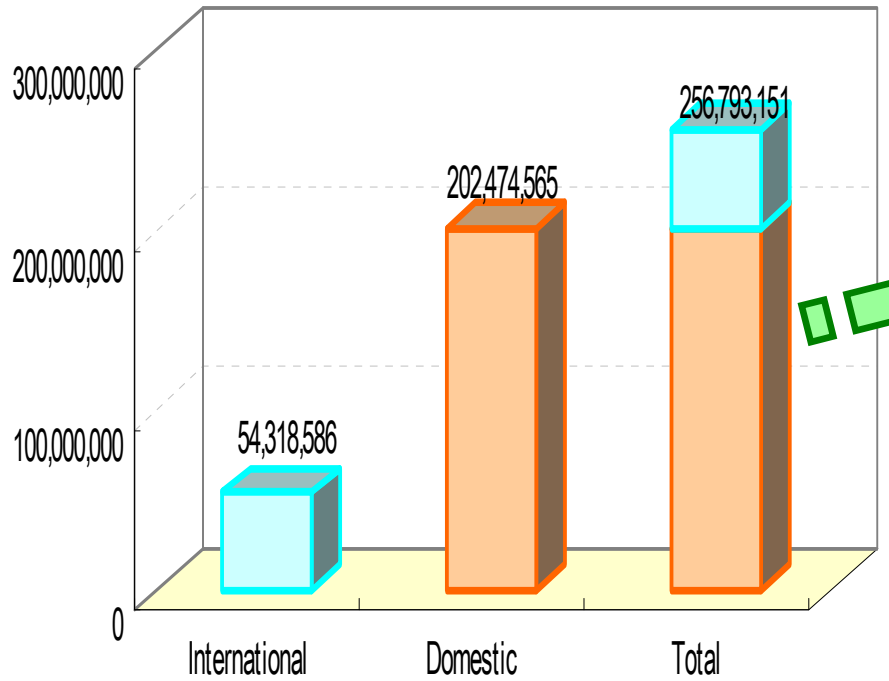
Traffic movement  
International  
+  
Domestic

- Japan
- World (except Japan)



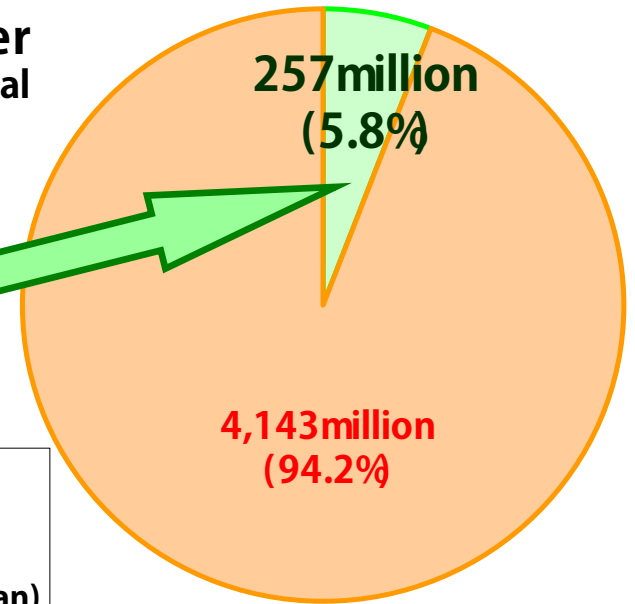
# Passengers (World and Japan) - 2006

Passengers (Japan)



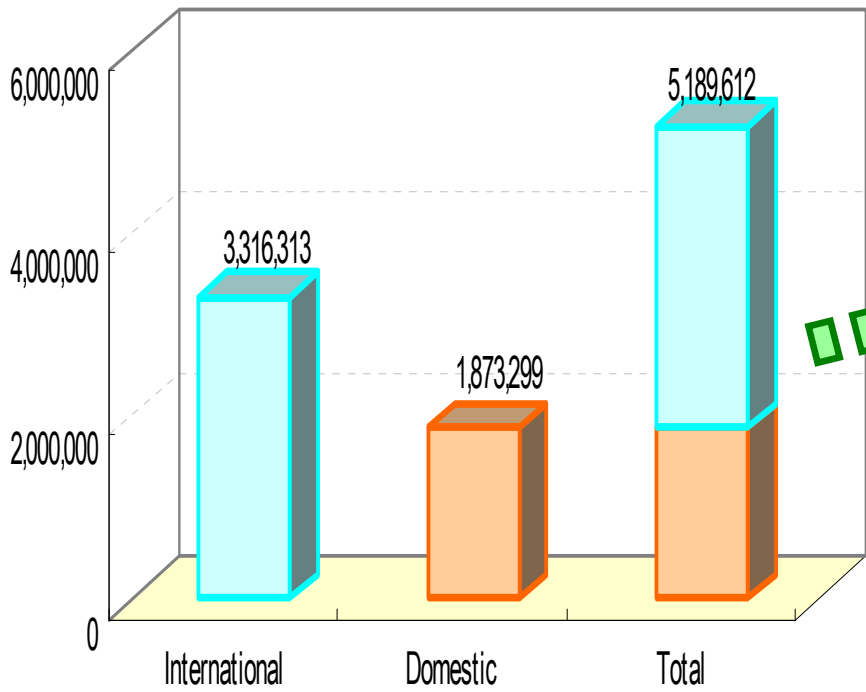
Passenger International + Domestic

- Japan
- World (except Japan)



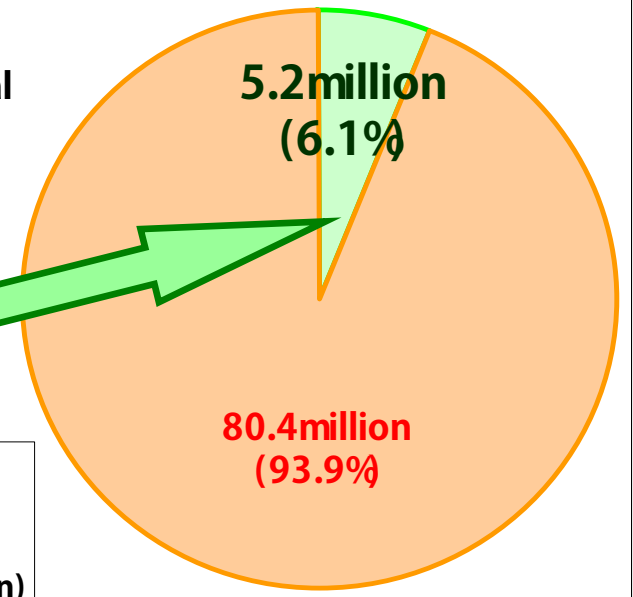
# Cargo (World and Japan) - 2006

Cargo (Japan)



Cargo International + Domestic

- Japan
- World (except Japan)



# Internationalization of Haneda Airport



- To open in October 2010
- Total slots 407,000 flights/year
- International passenger service 30,000 flights/year
- International passenger number 7 million/year
- International cargo 500,000 tons/year



**Expansion to increase capacity by 40%**  
 (Increase of 111,000flts/year 152flts/day)

(Present)	(After expansion)
30 Flights/hour	40flights/hour
296,000flts/year	407,000/year
405 arrivals & departures/day	557arrivals & departures/day

● ● ● | **Passengers by city (2006)**

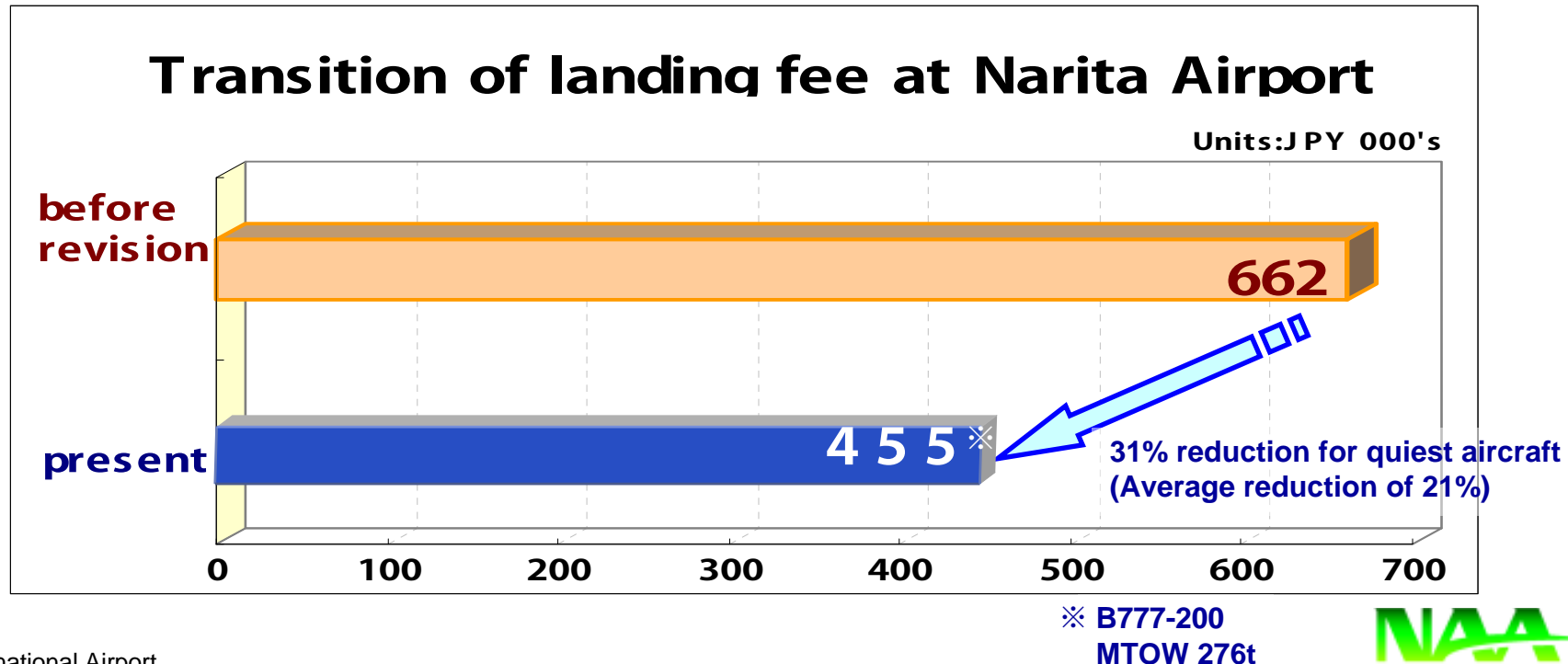
<b>City</b>	<b>Passengers</b>	<b>Airports</b>
London	<b>137,214,301</b>	Heathrow (67,530,197)、 Gatwick (34,172,492)、 Stansted (23,686,800)、 Luton (9,447,494)、 City (2,377,318)
New York	<b>107,057,595</b>	JF Kennedy Intl (43,762,282)、 La Guardia (26,571,146)、 Newark (36,724,167)
Tokyo	<b>100,873,779</b>	Narita (35,063,107)、 Haneda (65,810,672)
Chicago	<b>95,708,797</b>	O'Hare (77,028,134)、 Midway (18,680,663)
Paris	<b>82,471,719</b>	Charles de Gaulle (56,849,567)、 Orly (25,622,152)

Sources : ACI Worldwide Traffic Report 2006, N A A statistics

# Landing fee reduction

## Overcoming the image of being "expensive"

To pass on the benefits of privatization to airport users and to bolster Narita's international competitiveness in East Asia, landing fees were reduced in October 2005.



## ■ Situation before relocation

- Disproportionate use of the two terminals

➡ **Congestion in Terminal 2**

- Almost 66% of code-share services were in separate terminals

➡ **Inefficient Operation by Alliance**

➡ **Inconvenience of Transit Passengers**

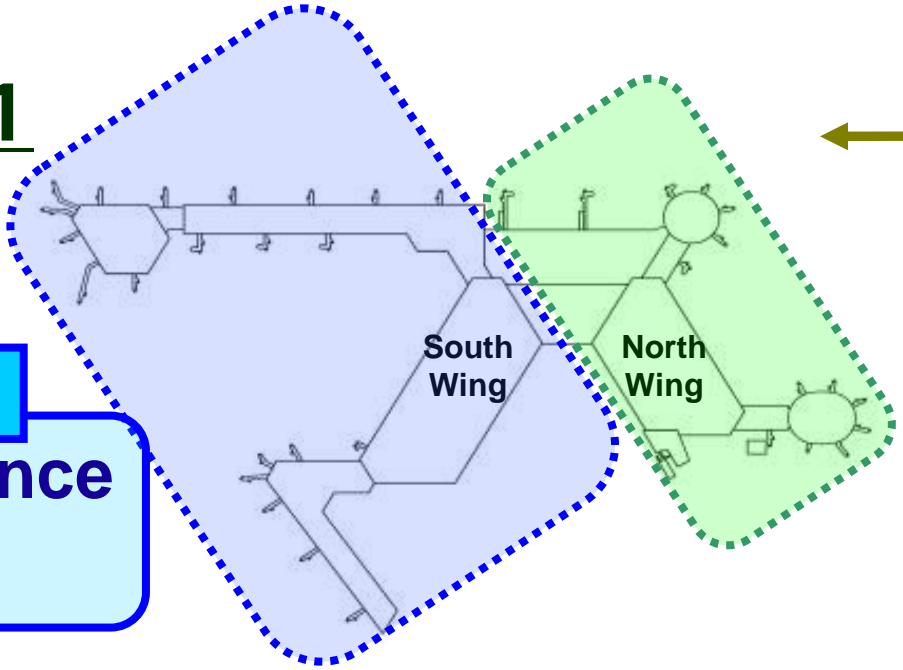
**Aim**

**To overcome these problems**

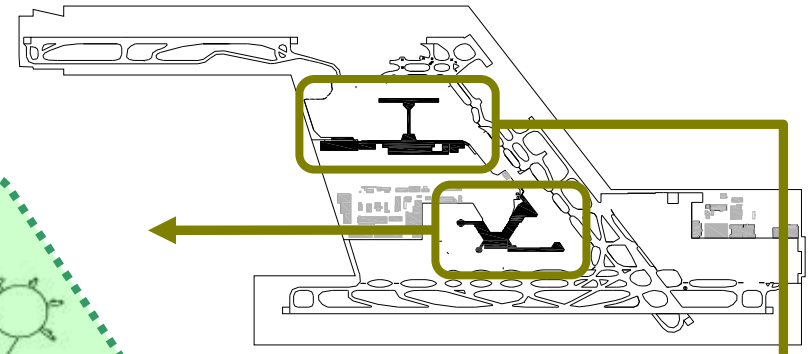
# ● ● ● | Alliance Arrangement

## Terminal 1

**South Wing**  
**Star Alliance**  
**ANA etc...**

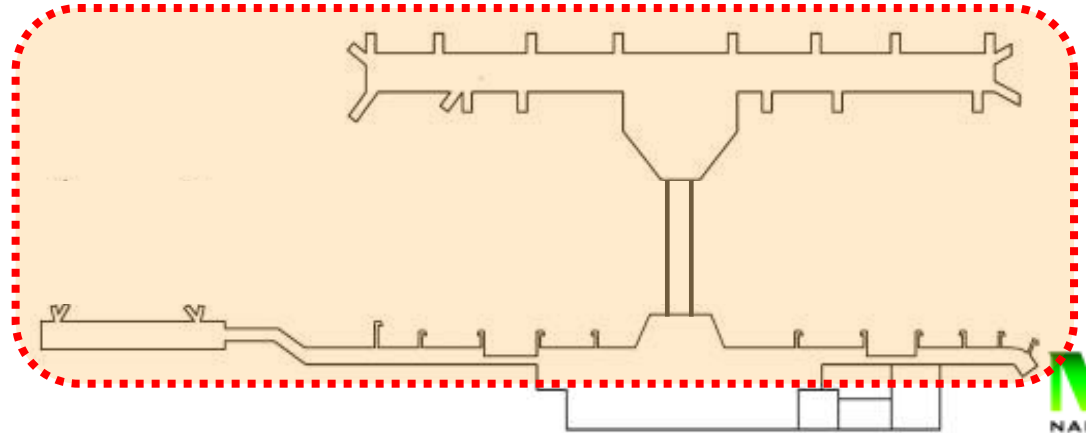


**One World**  
**JAL etc..**



**North Wing**  
**Sky Team**  
**NWA etc..**

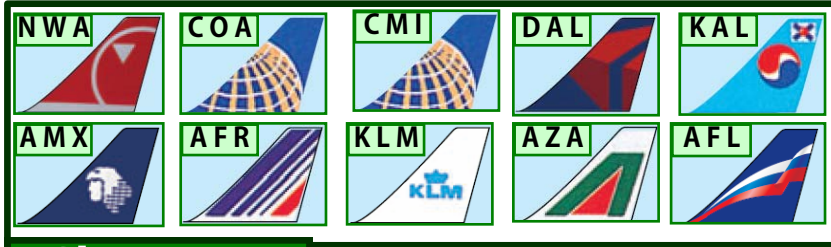
## Terminal 2



# Airline Distribution in Terminal Buildings

## Terminal 1

### North Wing



### Sky Team



### One World

### South Wing



### Star Alliance



31 airlines

## Terminal 2



### One World



### Sky Team



### Star Alliance

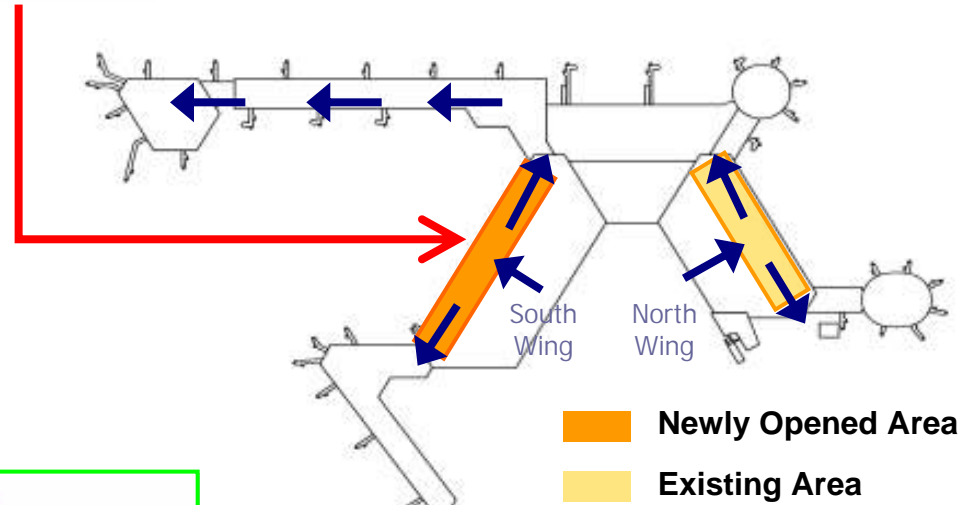


29 airlines

# Retail development in Terminal 1

Opening of "narita nakamise" in Terminal 1 , in 2006

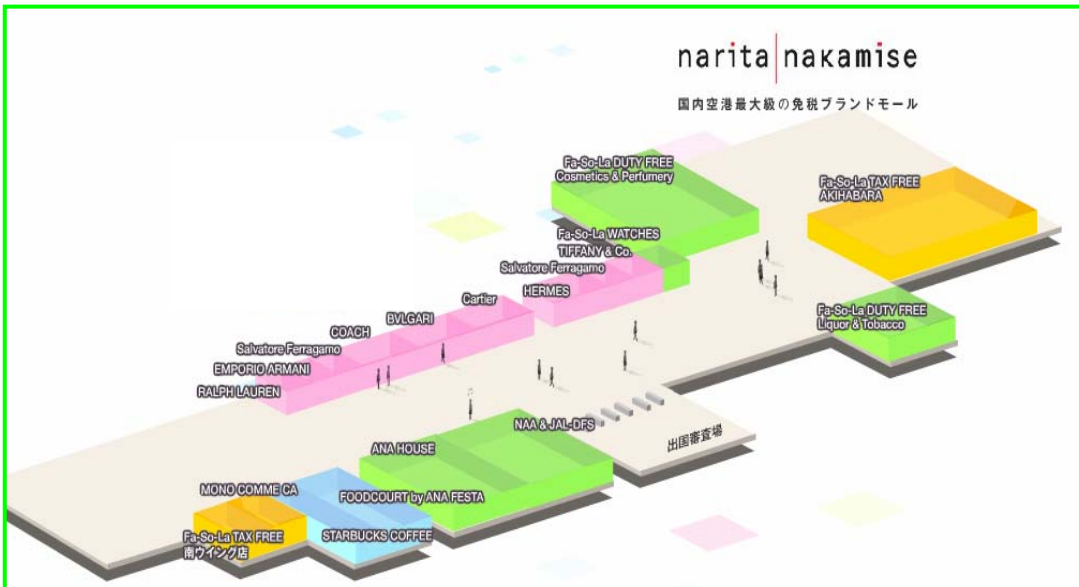
narita | nakamise



Newly Opened Area  
 Existing Area

## Concept

- Japanese tradition as area concept
- Calm environment
- Spacious shops, extensive selections

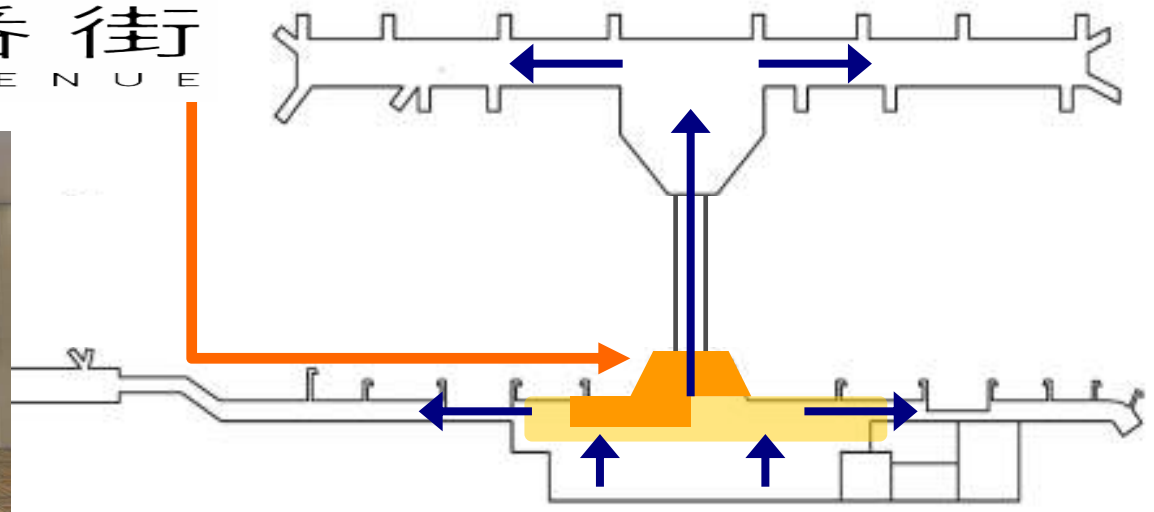


Cafés & Restaurants	2	331sqm
Tax-Free Shops	3	675sqm
Duty-Free Shops	14	2,679sqm
<b>TOTAL</b>	<b>19</b>	<b>3,685sqm</b>

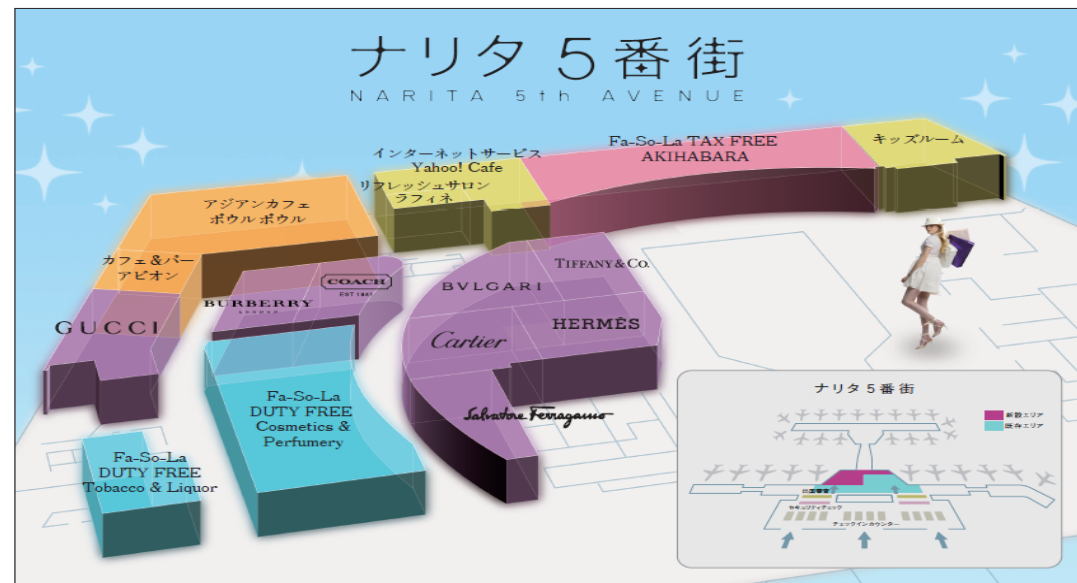
# ● ● ● | Retail development in Terminal 2

## Opening of "NARITA 5th AVENUE" in Terminal 2 , in 2007

ナリタ 5 番 街  
N A R I T A 5 t h A V E N U E



Newly Opened Area
  Existing Area



### Concept

- Timeless modern
- Sophisticated, universal interior
- Spacious shops, extensive selections

Cafés & Restaurants	3	684sqm
Tax-Free Shops	4	495sqm
Duty-Free Shops	22	3,077sqm
<b>TOTAL</b>	<b>29</b>	<b>4,256sqm</b>

## Contents of e-airport



### e-Information

Integrate public transport & flight information service



### Airport Net

On-airport Internet access



### e-Navigation

Comprehensive information service to PDAs, mobile phones, etc.



### Biometrics



### Automated gate

Integrated pax flow support

### e-Tag

Use of RFID tags to Provide sophisticated baggage management

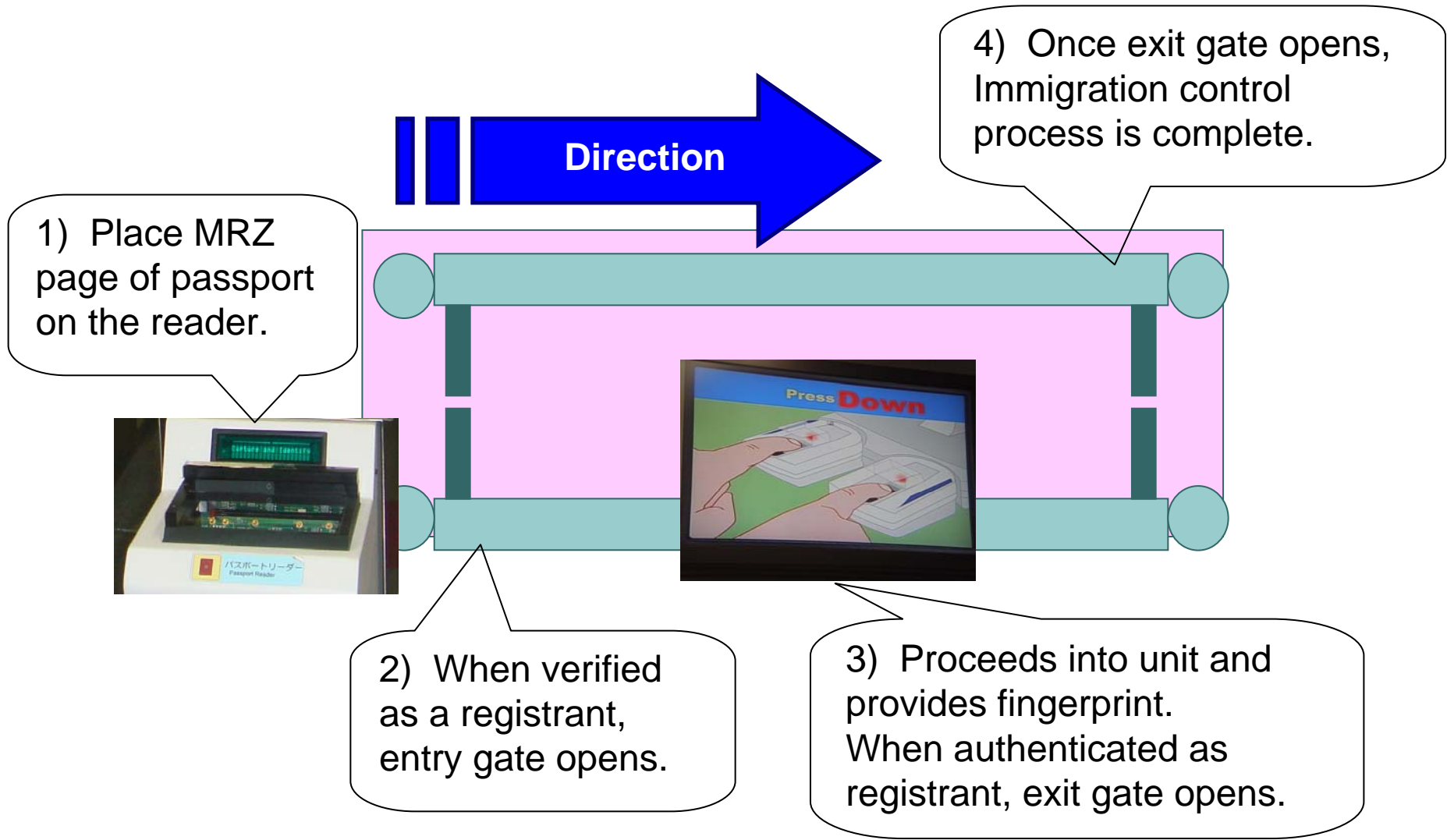


# Automated Gate for Immigration Control (Overview)

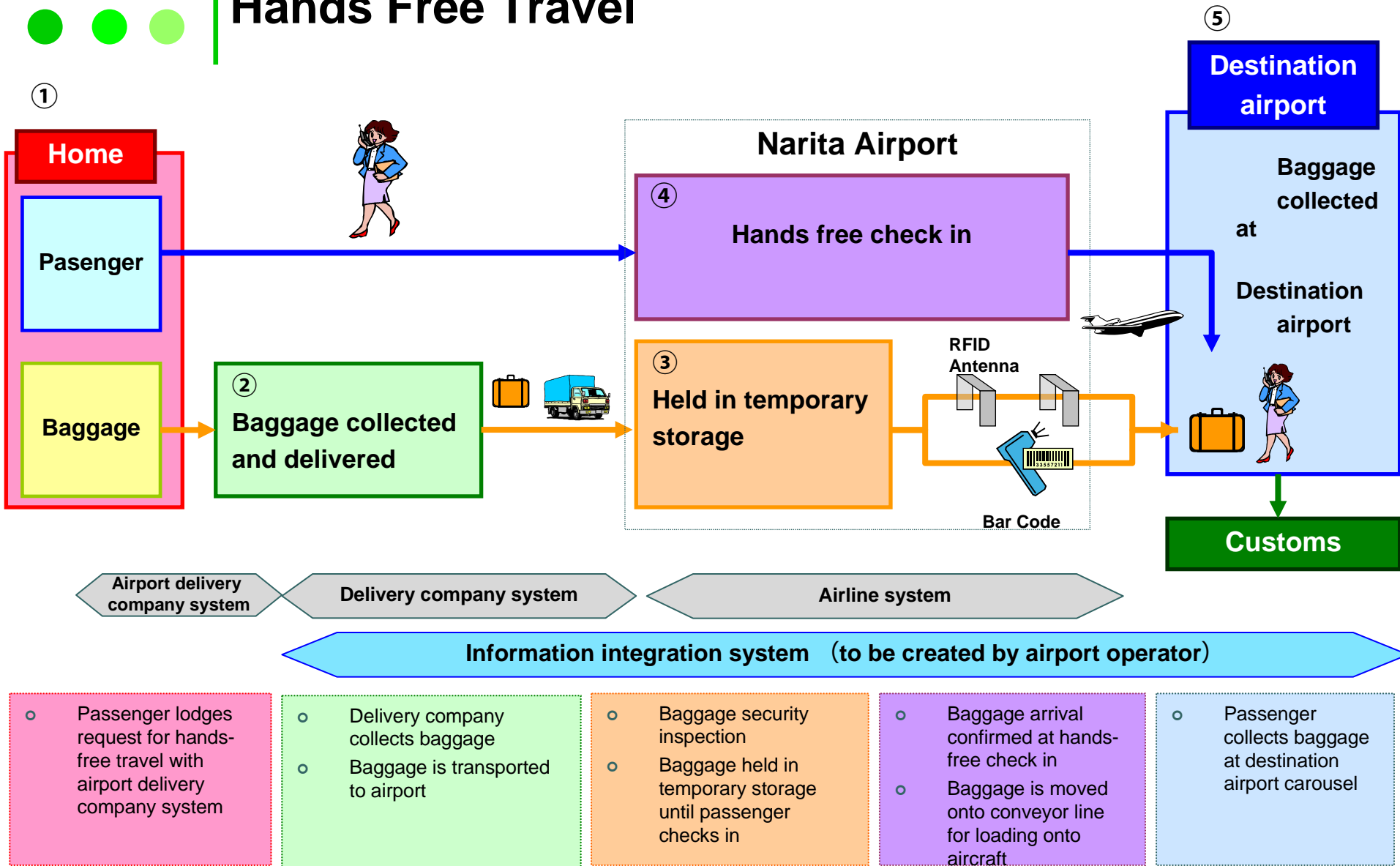
- ◆ Implementation: November 20, 2007
- ◆ Location: Departure and Arrival Immigration Areas at Terminal One South Wing and South-end of Terminal Two
- ◆ Eligibility: Japanese nationals and foreign nationals in possession of a re-entry permit
- ◆ Number of units: 4 units where each unit for use either by Japanese nationals or foreign nationals in possession of a re-entry permit.
- ◆ Objective: Simplify and reduce process times of immigration control, thus enhancing passenger convenience.
- ◆ Biometrics in use: Fingerprint (both index fingers)



# Automated Gate for Immigration Control (Process)



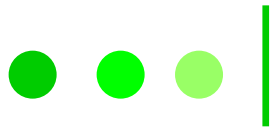
# Hands Free Travel



**Hands-free travel offers both convenience and security**

● ● ● | **The Eco-Airport Master Plan**





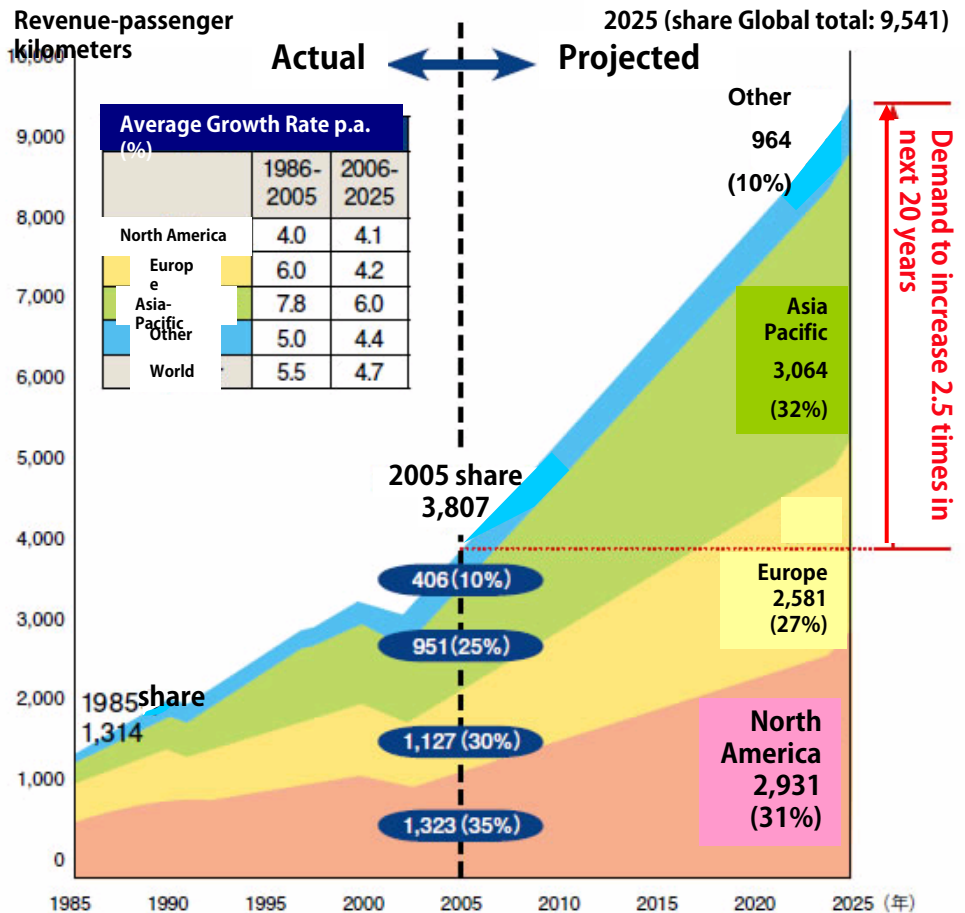
# **Part 3**

## **Future Concept for Narita Airport 10 Years Ahead 【Future Initiatives】**

# Global Trends in Air Transport and Tourism Demand

Overall, global air passenger numbers are growing dramatically, particularly in Asia, and according to the Ministry of Economy, Trade and Industry, passenger figures will stand at 2.5 times the current number by 2025. International tourism demand is also growing strongly, particularly in Asia also, and World Tourism Organization statistics show an average growth rate of 7.1% in Asia between 2000 and 2005.

## Global Trends in International Air Transport Demand



## Global Trends in International Tourism Demand

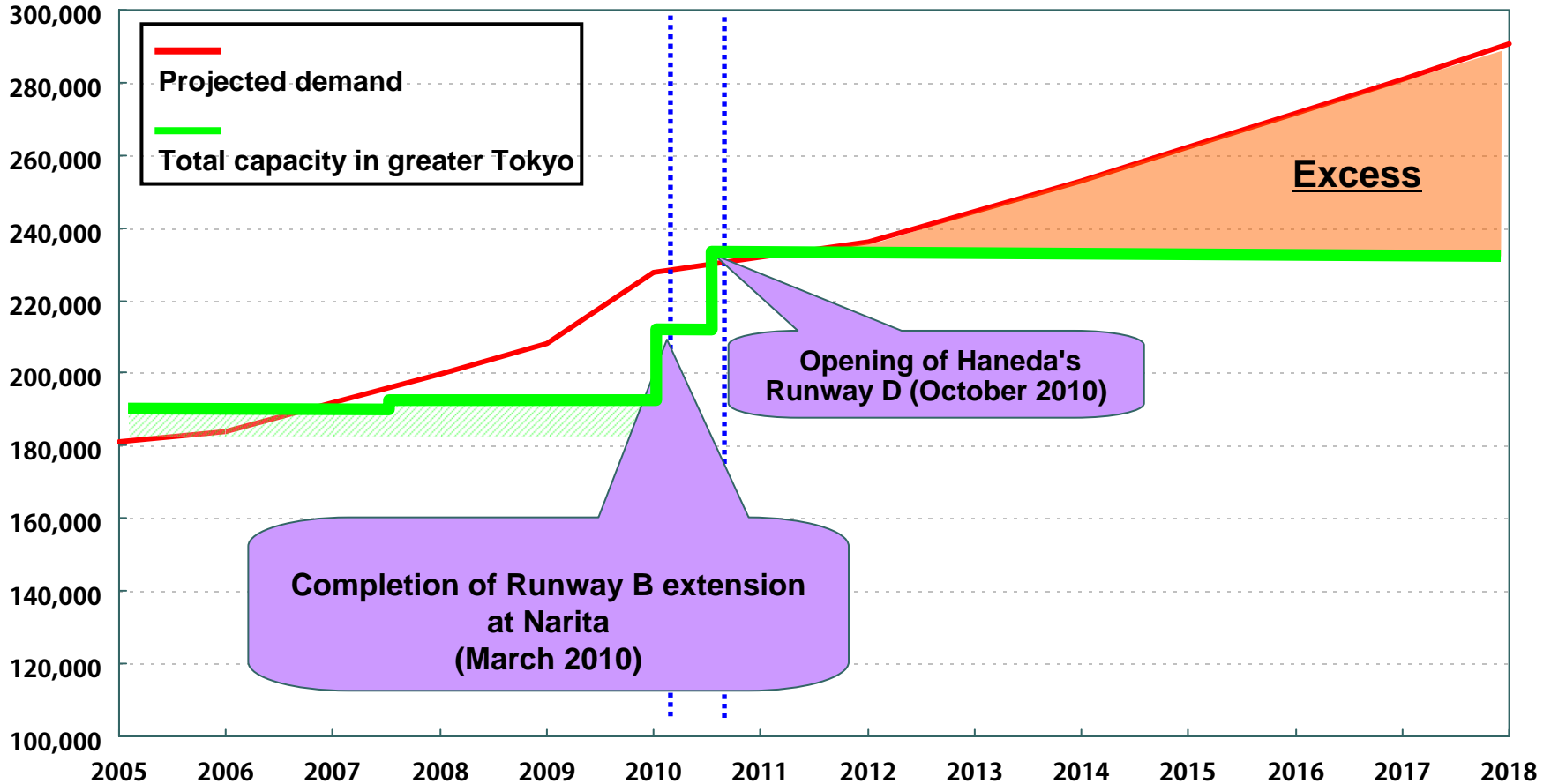
	International Tourist Arrivals (million)						Share (%)		Change (%)		Average annual growth (%)
	1990	1995	2000	2003	2004	2005*	2005*	04/03	05/04	00/05*	
World	439	540	687	694	764	806	100	10.1	5.5	3.3	
Europe	265.6	315.0	395.8	407.1	424.4	441.5	54.8	4.3	4.0	2.2	
Northern Europe	31.6	40.1	45.8	45.8	49.6	52.9	6.6	8.4	6.5	2.9	
Western Europe	108.6	112.2	139.7	136.1	139.0	142.7	17.7	2.2	2.6	0.4	
Central/Eastern Europe	31.5	60.0	69.6	78.5	86.3	87.9	10.9	10.0	1.9	4.8	
Southern/Mediterranean Europe	93.9	102.7	140.8	146.8	149.5	158.0	19.6	1.9	5.7	2.3	
Asia and the Pacific	56.2	82.4	110.5	113.3	144.2	155.4	19.3	27.3	7.8	7.1	
North-East Asia	26.1	41.3	58.3	61.7	79.1	87.6	10.9	28.6	10.3	8.5	
South-East Asia	21.5	28.8	36.9	36.1	47.1	49.3	6.1	30.4	4.8	6.0	
Oceania	5.2	8.1	9.2	9.0	10.1	10.5	1.3	12.1	3.8	2.6	
South Asia	3.2	4.2	6.1	6.4	7.6	8.0	1.0	18.5	5.5	5.7	
Americas	92.8	109.0	128.1	113.1	125.7	133.5	16.6	11.1	6.2	0.8	
North America	71.7	80.7	91.4	77.3	85.7	89.9	11.2	10.9	4.9	-0.3	
Caribbean	11.4	14.0	17.1	17.1	18.1	18.9	2.3	5.9	4.3	2.0	
Central America	1.9	2.6	4.3	4.9	5.7	6.5	0.8	15.6	15.7	8.5	
South America	7.7	11.7	15.3	13.8	16.2	18.2	2.3	17.2	12.2	3.6	
Africa	15.2	20.3	28.2	31.0	33.8	36.7	4.6	9.1	8.5	5.4	
North Africa	8.4	7.3	10.2	11.1	12.8	13.7	1.7	15.1	7.5	6.0	
Sub-Saharan Africa	6.8	13.0	17.9	19.9	21.1	23.0	2.9	5.8	9.1	5.1	
Middle East	9.6	13.7	24.2	29.5	36.3	39.1	4.8	22.8	7.7	10.1	

(Data collected by the UNWTO until 2006)

Source: White Paper on Manufacturing; Ministry of Economy, Trade and Industry.

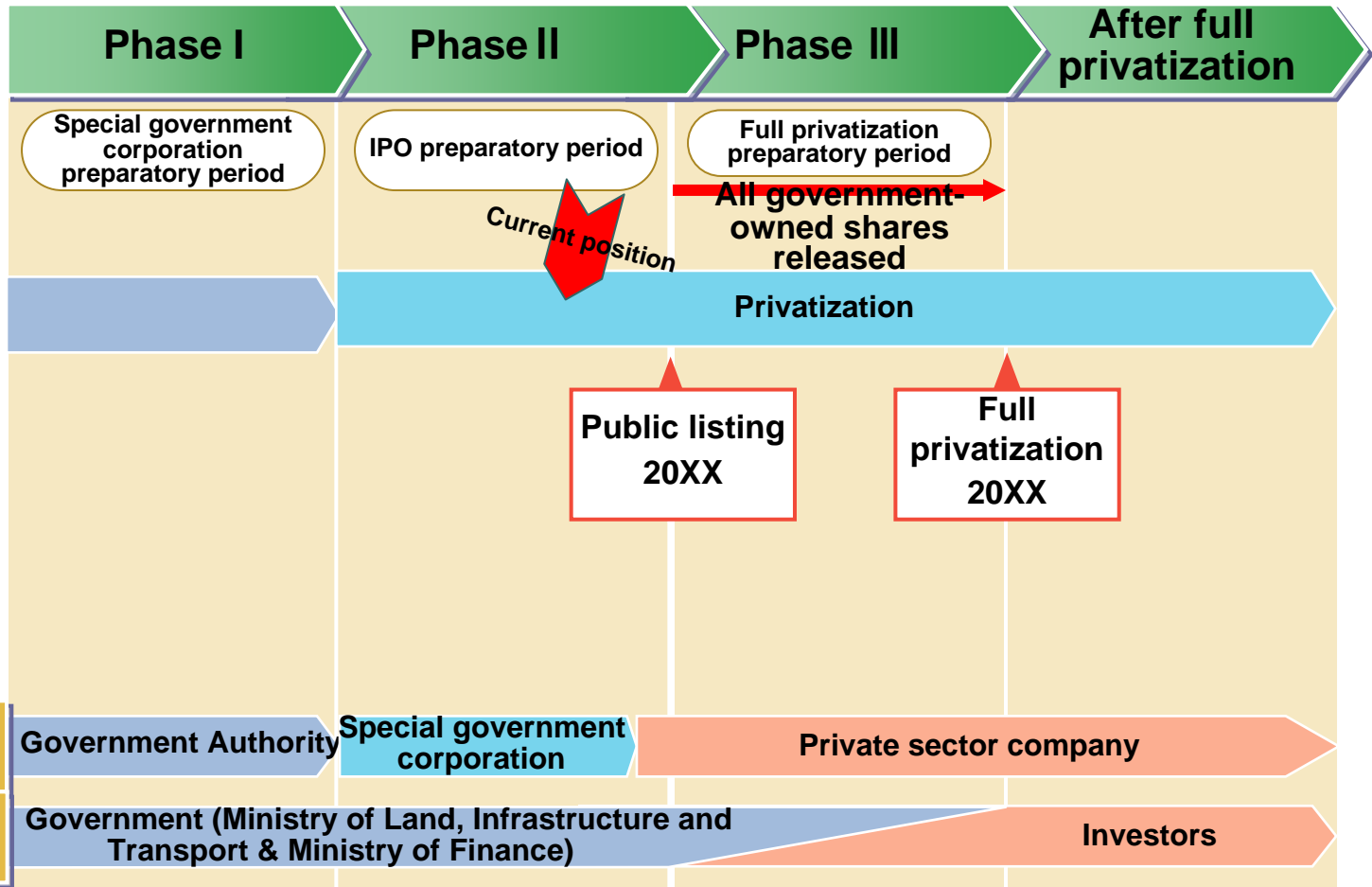
# Forecast International aircraft movements in Greater Tokyo

Traffic Movements



※ In 2010 when the fourth runway is opened, Haneda Airport will have 30,000 slots for scheduled international passenger services during daylight hours. This may be subject to change at a later date depending of circumstances. Scheduled international flights, including cargo flights, may operate during late-night, early morning hours, over and beyond the 30,000 slots available during daylight hours.

# Steps to Full Privatization



After the Council for Transport Policy hands down its report, legislation will be prepared, preparatory studies will be launched, including selection of items required by the Fiscal System Council for sale of shares, and, after necessary procedures have been completed, NAA's shares will be listed on the market at the optimum time.

\*Official name: Narita International Airport Corporation

# Northward Extension Plan (After Completion)

① Northward extension of Runway B (2,180m → 2,500m)

② Construction of Taxiways C and D

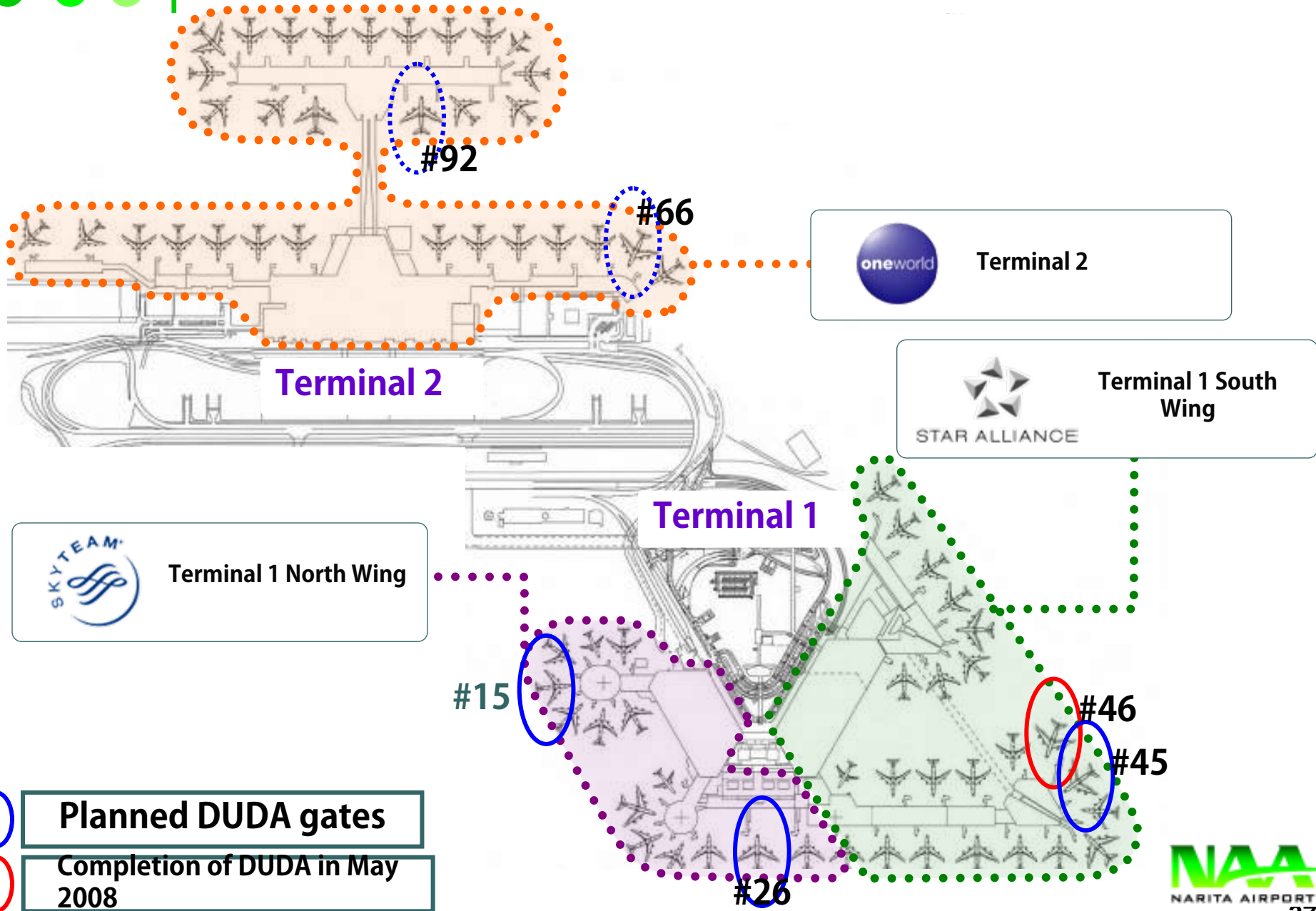
— R/w B dep R/w A arr  
— R/w B arr R/w A dep

**200,000 → 220,000 flights**

# A380 Flight operation at Narita



# Installation of A380 Direct Upper Deck Access (DUDA)

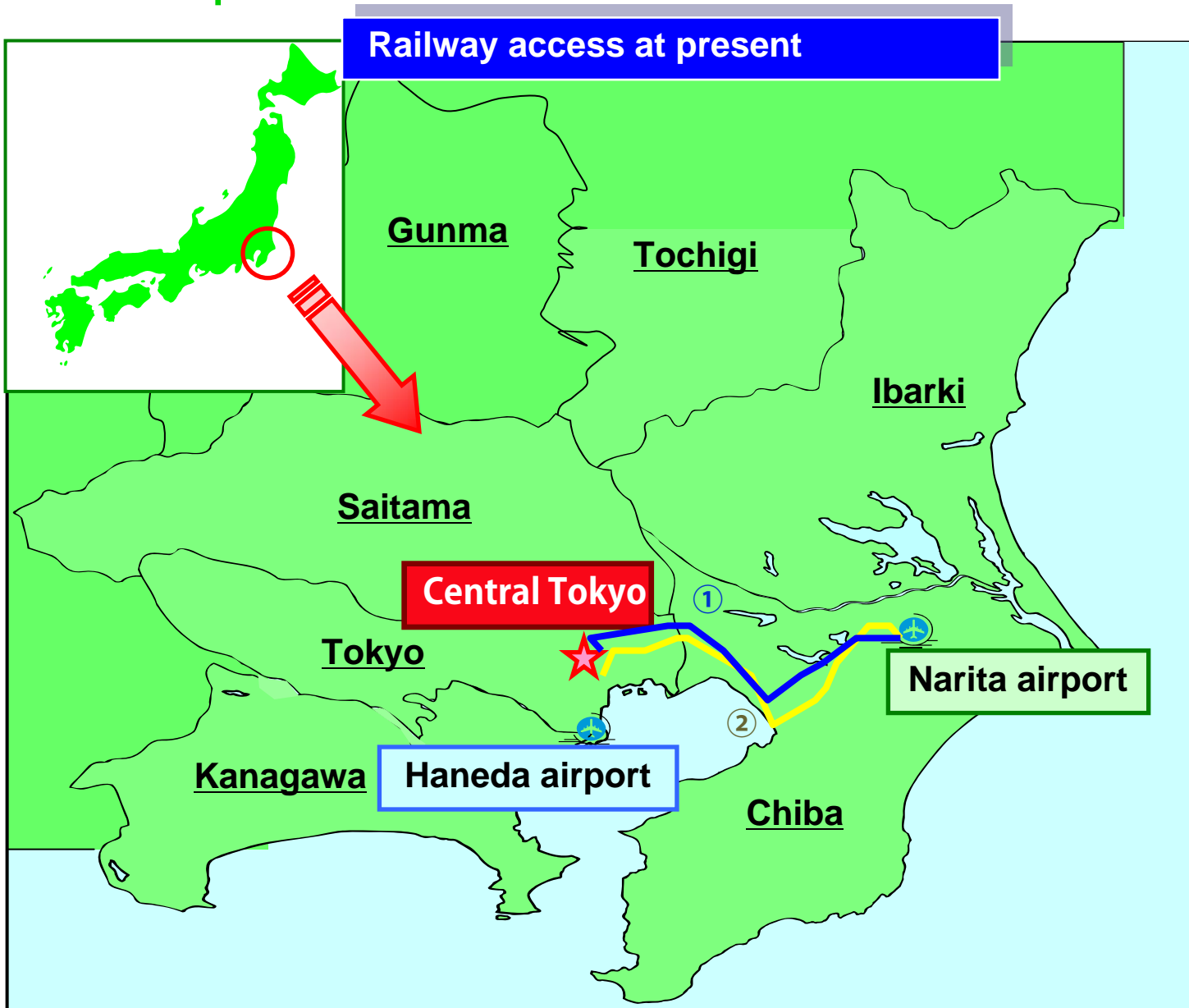


# Plans for A380 Services at Narita Airport

As of May 2008

A/L	Terminal	Timing	Route
	1	20th May 2008	Changi-Narita (1 flight/day)
	1	TBD	Paris-Narita
	1	TBD	Frankfurt-Narita
	1	TBD	Seoul-Narita
	1	TBD	Bangkok-Narita
	1	TBD	London-Narita
	2	TBD	Sydney-Narita
	1	TBD	London-Narita

# Investment in railway access between Narita and Central Tokyo



Skyliner[51min]  
Nippori – Narita airport



①

Narita Express[53min]  
Tokyo – Narita airport



②

# Narita Rapid Railway Plan

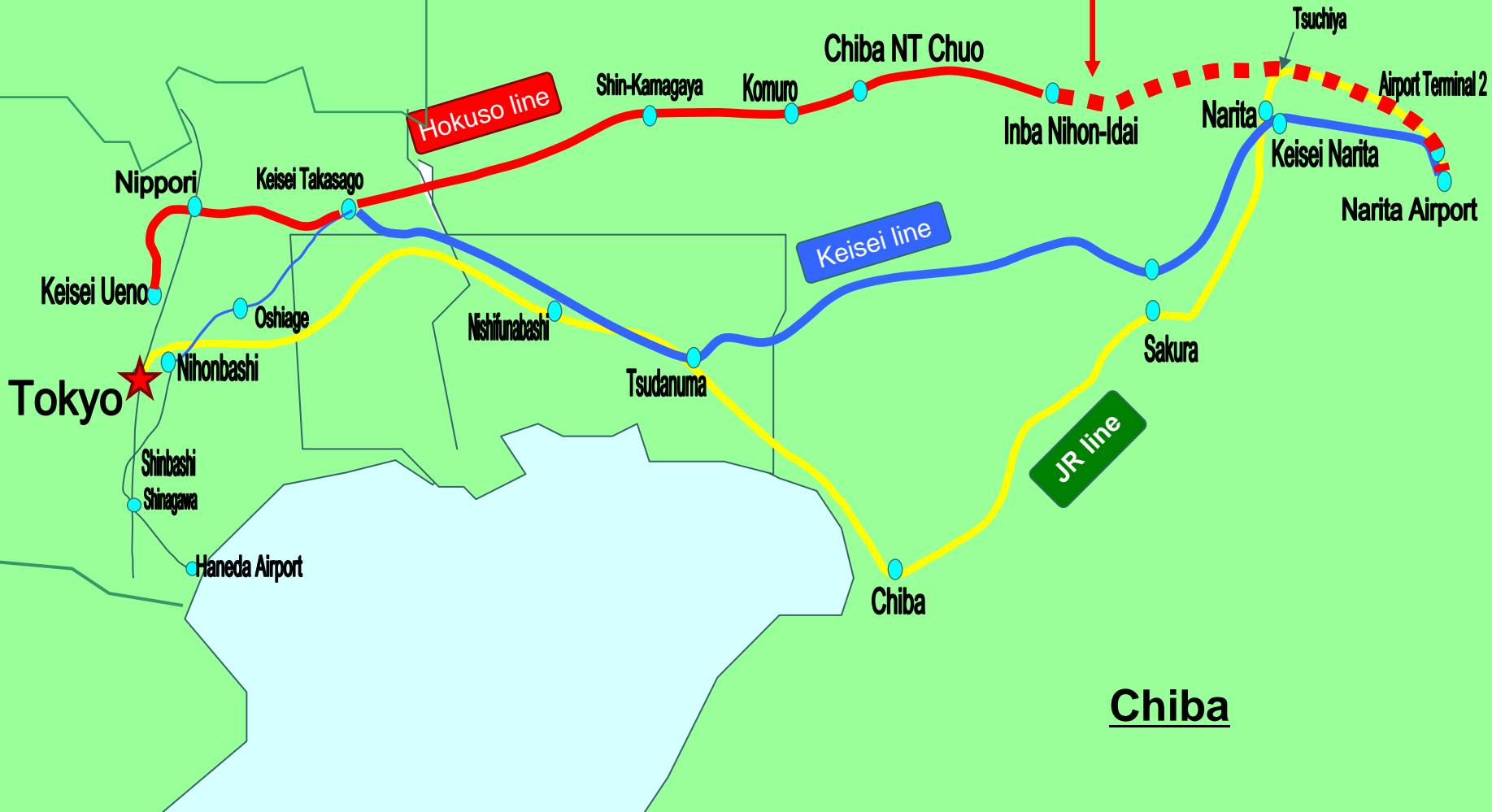
## Narita Rapid Railway Plan

- Total project cost: 1.5 billion US \$ (6 hundred million US \$ from NAA)
- Planned opening year: 2010
- Nippori – Airport: 36 minutes
- New high-speed Skyliner service operated by Keisei Railway

Saitama

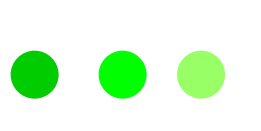
Tokyo

Chiba

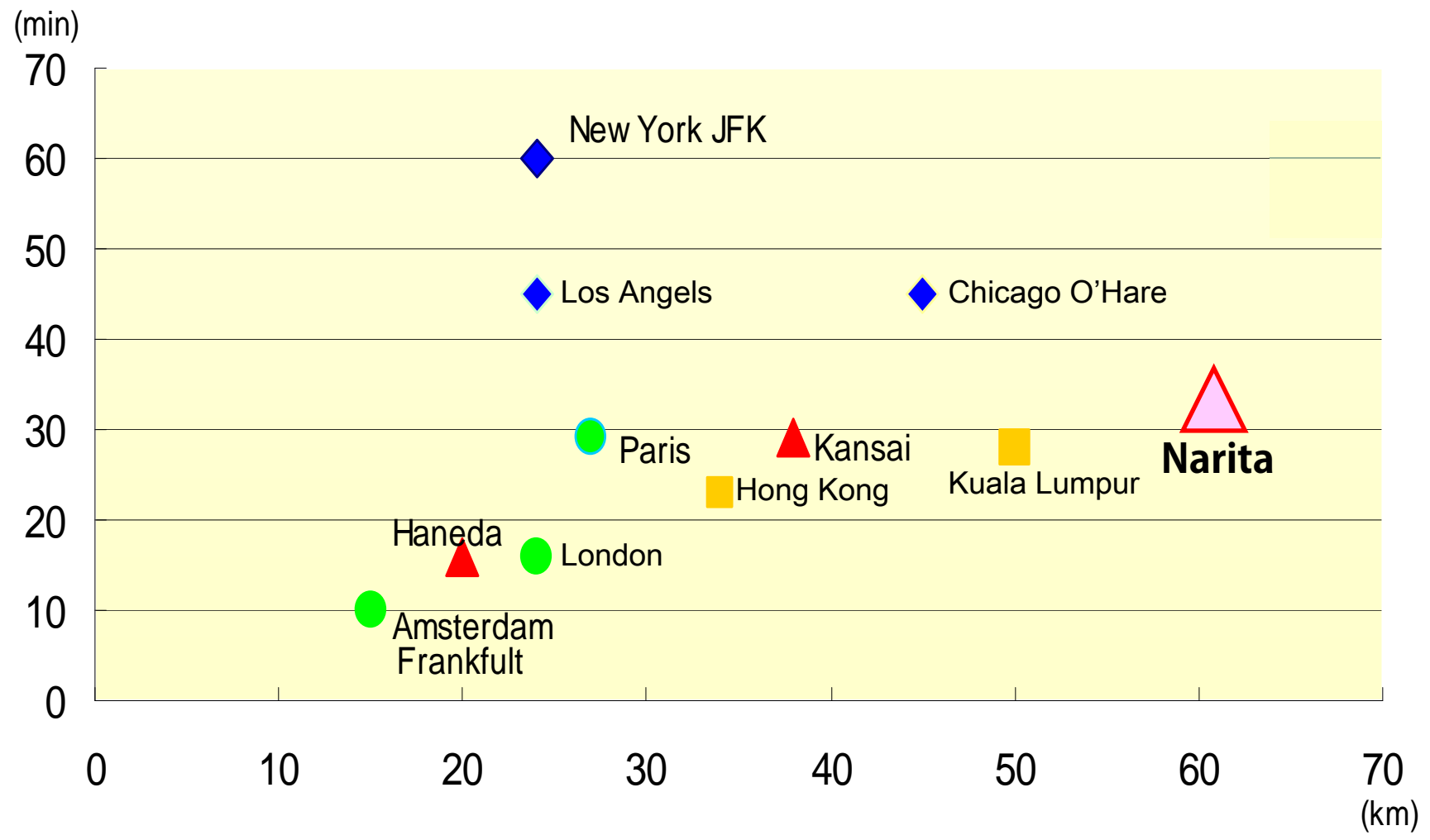


● ● ● | **New Keisei Rapid Train (Skyliner)**





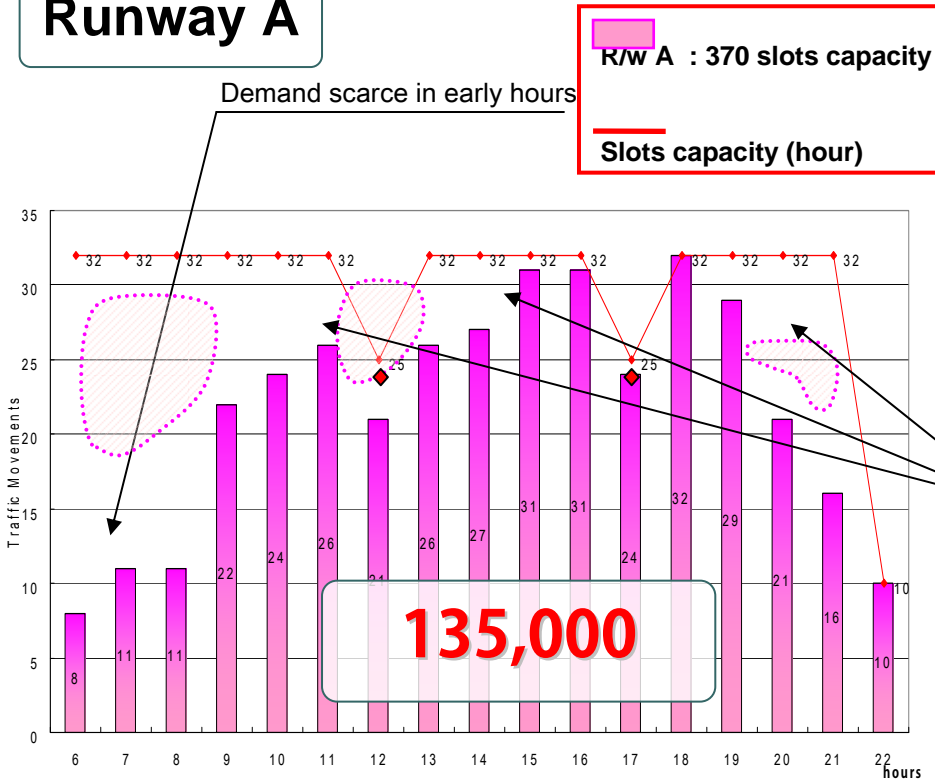
# Rail Access between Airport and downtown



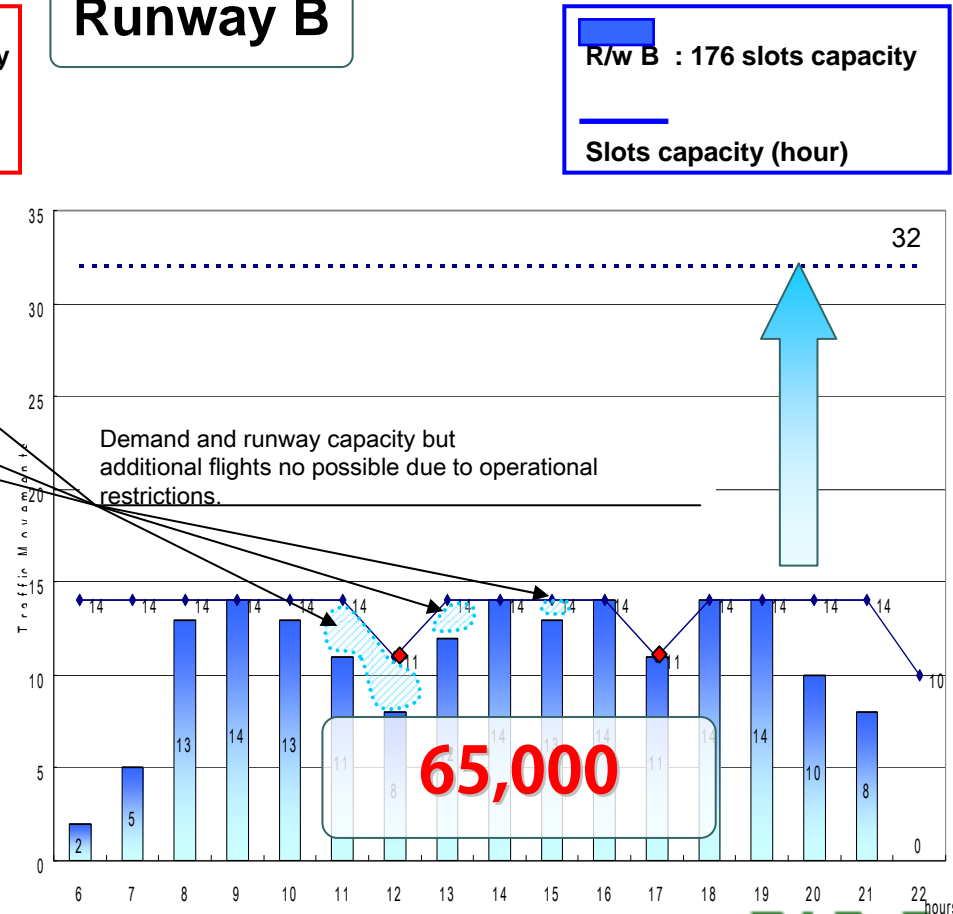
# Flights on Runways A & B combined (now)

- \* Runway A handles 135,000 flights a year but Runway B can handle only 65,000 due to taxiway layout and other restrictions.
- \* Capacity can be expanded by removing operational restrictions on Runway A.

## Runway A

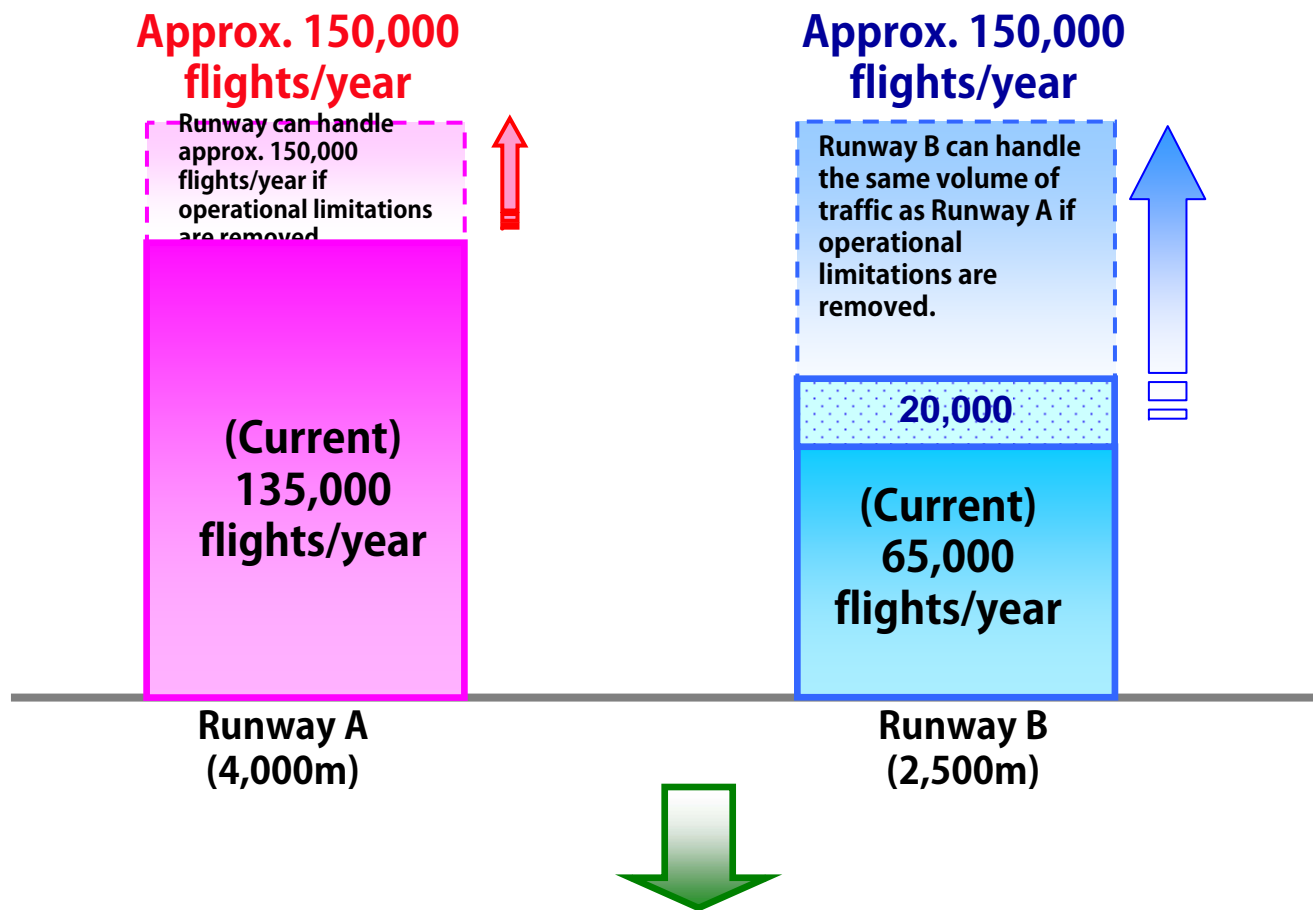


## Runway B



# Narita Airport's Potential (Maximum Handling Capacity Possibilities)

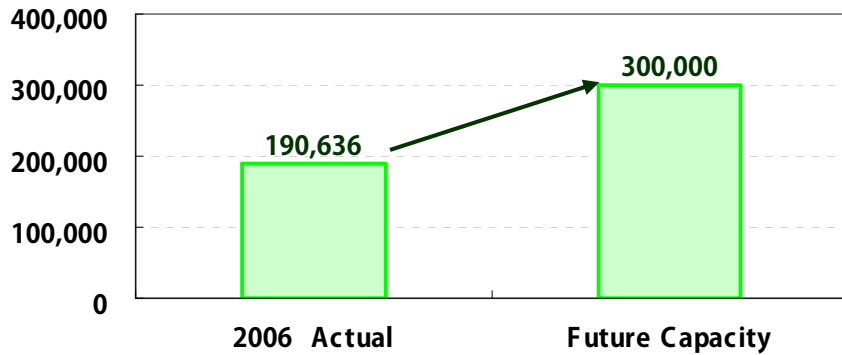
~ How Far Can Narita Airport Expand ? ~



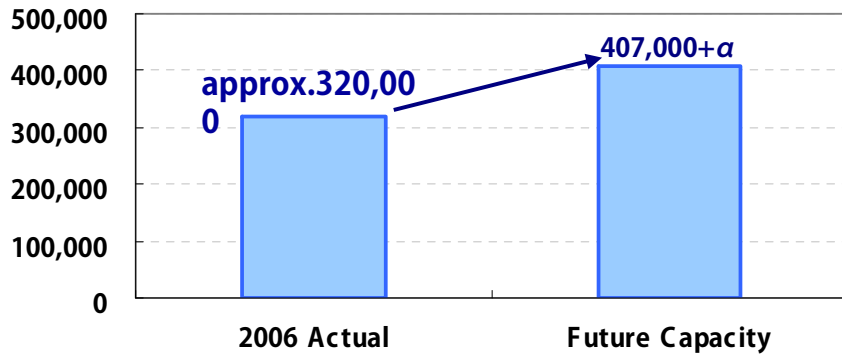
Even by maintaining the current operating hours (6:00am-11:00pm), it will be possible for Runways A and B to handle up to 300,000 flights a year if environmental, facility and operational limitations are removed.

# Future Capacity and Traffic Forecast in greater Tokyo

**Narita airport**  
(Traffic movements(international+domestics))

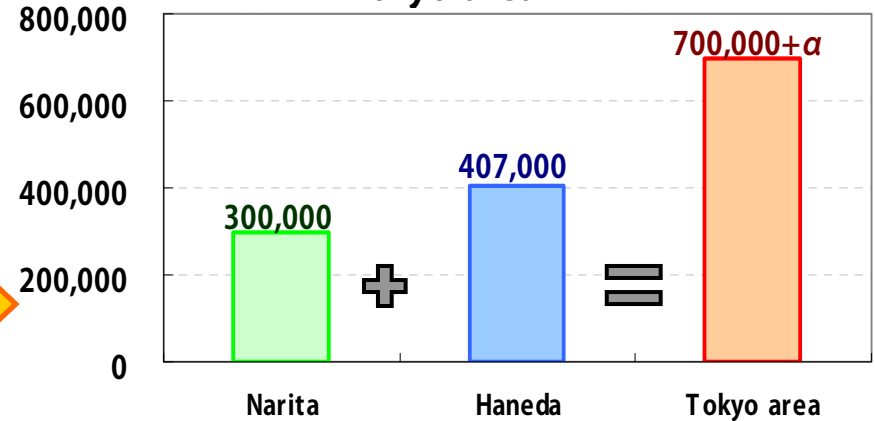


**Haneda airport**  
(Traffic movements(international+domestics))



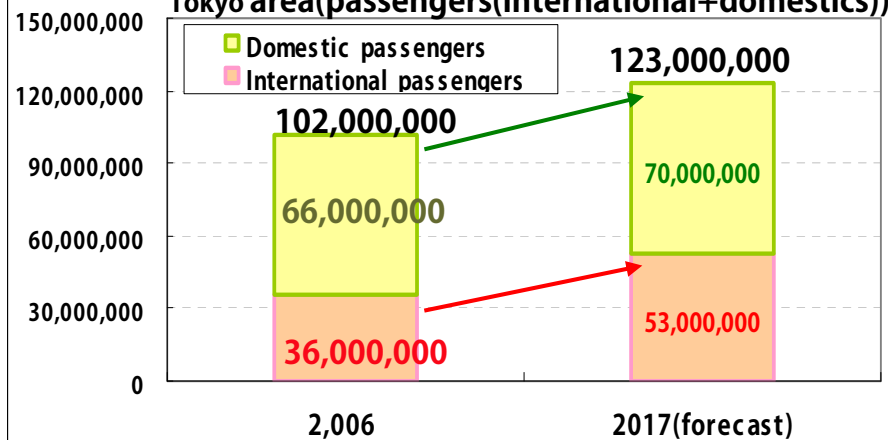
**Capacity**

**Tokyo area**



**Passengers**

**Tokyo area(passengers(international+domestics))**



- ◆ **Strong air transport demand in Asia**
- ◆ **Japan is the powerhouse among Asian countries**
- ◆ **Narita Airport is**
  - **Japan's premier airport**
  - **The leading airport in Asia**



**Develop airport facilities with a view to demand**  
**in 10 years time**

Thank you!!

