

Japan's Logistics "2024 Problem" - Driver Shortages -

(Why Do Japanese Companies See India as the Hottest Market ?)



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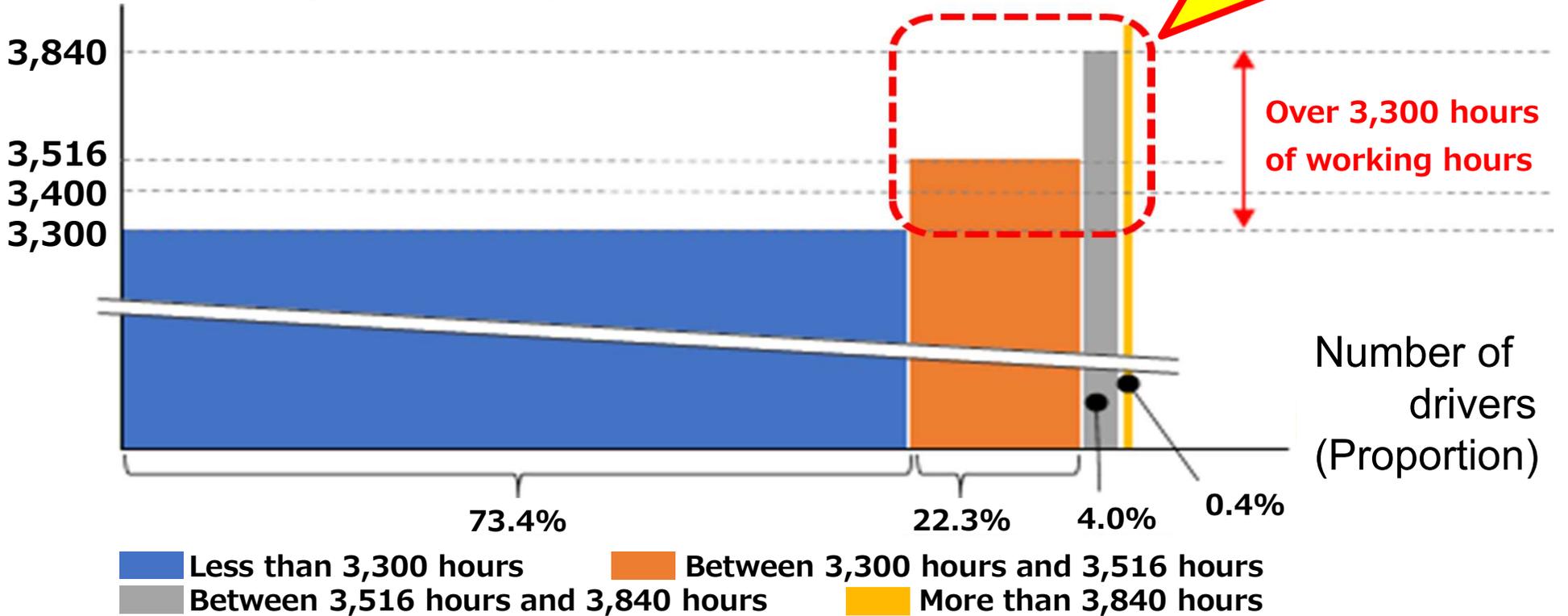
1. What is the 2024 Problem?

Restriction on overtime for truck drivers.

	End of March 2024	From April 1, 2024~
Maximum limit on overtime work. (Labor Standards Act)	none	960 hours/year (720 hours in principle) 
Maximum limit on work hours. (Improvement Standards Notification)	1 day 16 hours (13 hours in principle) * Over 15 hours drives are limited to twice a week	1 day 15 hours (13 hours in principle) * Long distance drives are limited to 16 hours twice a week
	1 month 320 hours (293 hours in principle)	1 month 310 hours (284 hours in principle)
	1 year 3,516 hours	1 year 3,400 hours (3,300 hours in principle)

2. Major Impacts

Annual Working Hours Diagram



Shortfall in Transport Capacity (Overall)

	Percentage of Shortfall in Transport Capacity	Shortfall in Transport Tonnage of Trucks
Fiscal year 2024	14.2 %	400 million tons
Fiscal year 2030	34.1 %	940 million tons

Note: In fiscal year 2024, if the working hours are set at 3,400 hours, the shortfall in transport capacity is expected to be 5.6%, and the shortfall in transport tonnage is expected to be 160 million tons.

3. Measure Toward Solutions

Increasing Load Factor

- Joint Delivery Services
Mixed-load transport and driver relay at transit hubs



- Utilization of double-trailer trucks and autonomous trucks



Promotion of Modal Shift

- Transportation by rail, air, and sea

Autonomous Truck Pilot Transport



Cross-industry joint transportation



Note: **Modal shift** is a shift in the mode of cargo transport from trucks and other vehicles to rail, air, and ships, which have a smaller environmental impact.

4. Conclusion



Japan plans 'conveyor belt road' linking Tokyo and Osaka amid delivery driver shortage

Japan is planning to build an automated cargo transport corridor between Tokyo and Osaka, dubbed a "conveyor belt road" by the government, to make up for a shortage of truck drivers.

Source: Tokyo(AP).

Pilot Experiment by Yamato Transport and WATT

Starting Friday, August 22, 2025, Yamato Transport and WATT began a demonstration experiment using autonomous delivery robots to develop a new last-mile delivery model for large-scale apartment complexes.



Source: Yamato Transport.

5. Why Do Japanese Companies See India as the Hottest Market ?

GDP ranks 3rd in the world.

- In the future, it is expected to surpass Japan and Germany become the world's third-largest GDP.
- It will have the third-largest economy after China and the United States.

Comparison of land area.

- India's land area is 3.287 million square kilometers.
- Japan's land area is 377,975 square kilometers.

Comparison of Population between India and Japan.

- India's Population (July 2023) : 1.436 billion.
- Japan's Population (June 2012) : 123.3 million.

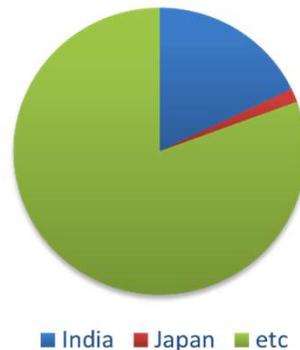
World Population (April 2024) :

- India : 1st Place
- Japan : 12th Place

The population ratio of Japan to India.



The population ratio of Japan / India to the world.



Thank you for your attention



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