

HANEDA

**Tokyo
International
Airport**

ISAO TAKASHIRO

Japan Airport Terminal Co., Ltd.
Chairman & CEO

- 1 Overview of Haneda Airport
- 2 Changing Landscape in DF & TR Business
- 3 Strategy for DF & TR Business
- 4 Mission

1 Overview of Haneda Airport



-  Tokyo Monorail
Hamamatsucho Sta. **17** min
-  Keikyu Line
Shinagawa Sta. **12-15** min
-  Limousine Bus
Tokyo Sta.(Yaesu) **Approx. 30** min



Tokyo Monorail
Hamamatsucho Sta. **17** min

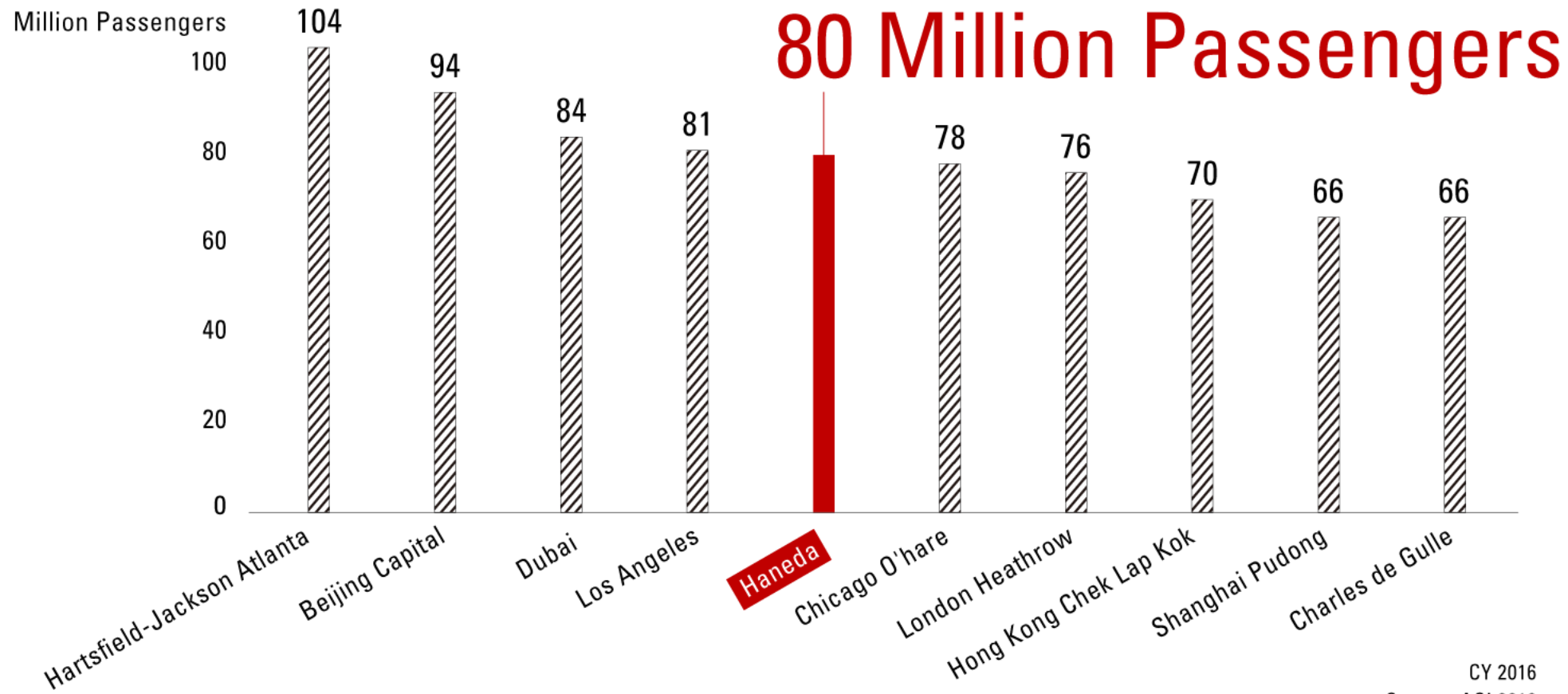


Keikyu Line
Shinagawa Sta. **12-15** min



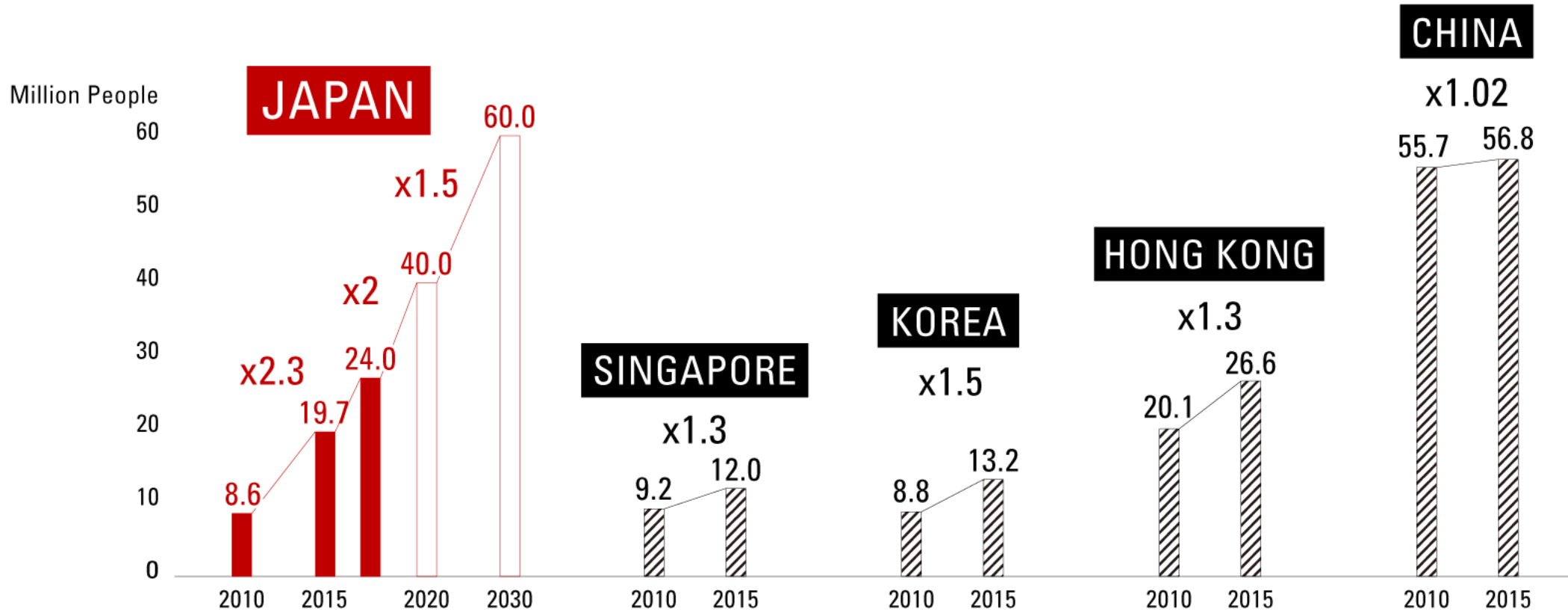
Limousine Bus
Tokyo Sta.(Yaesu) **Approx. 30** min

5th in World Rankings of Passenger Traffic in 2016



CY 2016
Source: ACI 2016

Largest Growth in Int'l Visitor Arrivals to Japan among 5 Asian Destinations

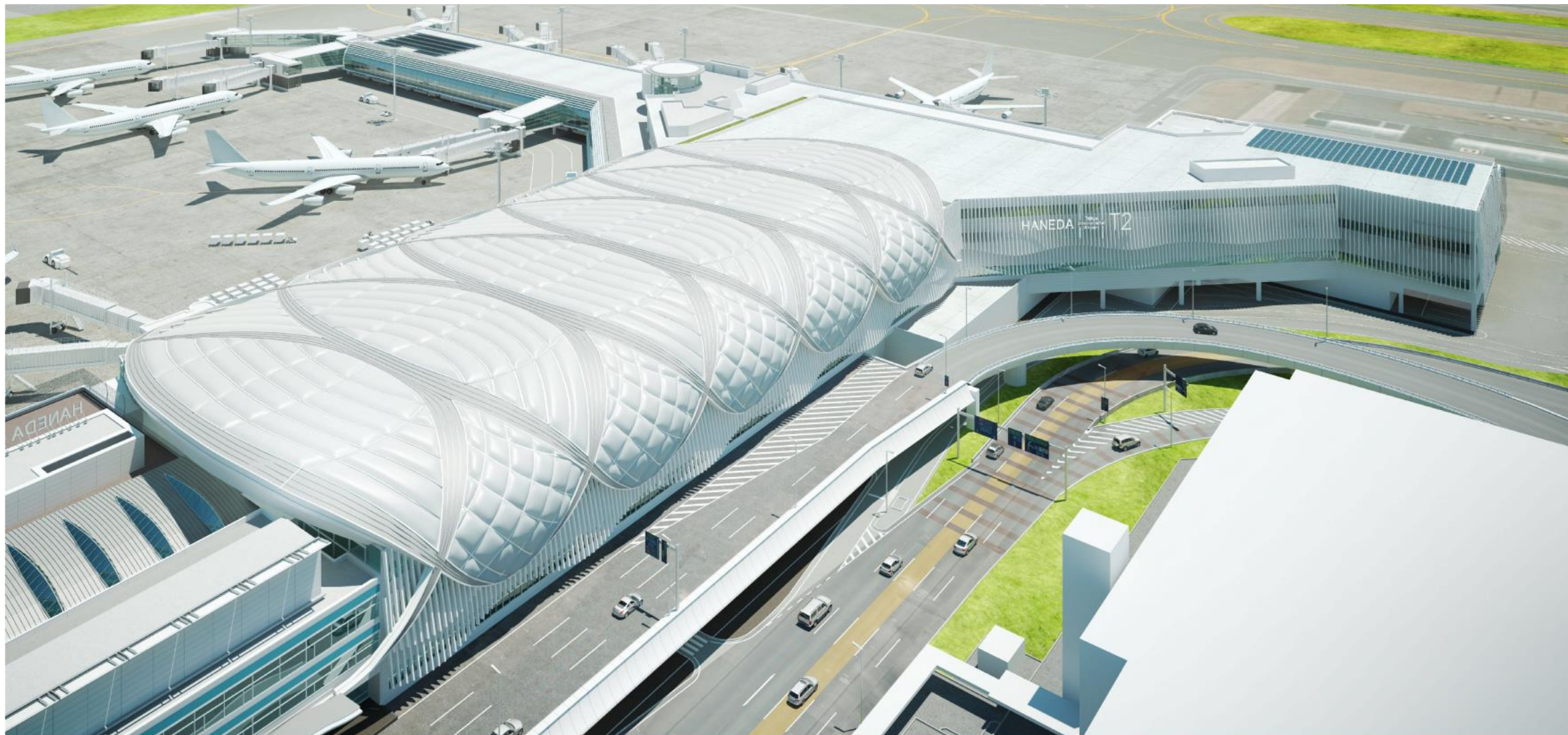


Over **10** Million In **2013**

Over **20** Million In **2016**

Source: JNTO

T2 Conversion in 2020 : Domestic to International



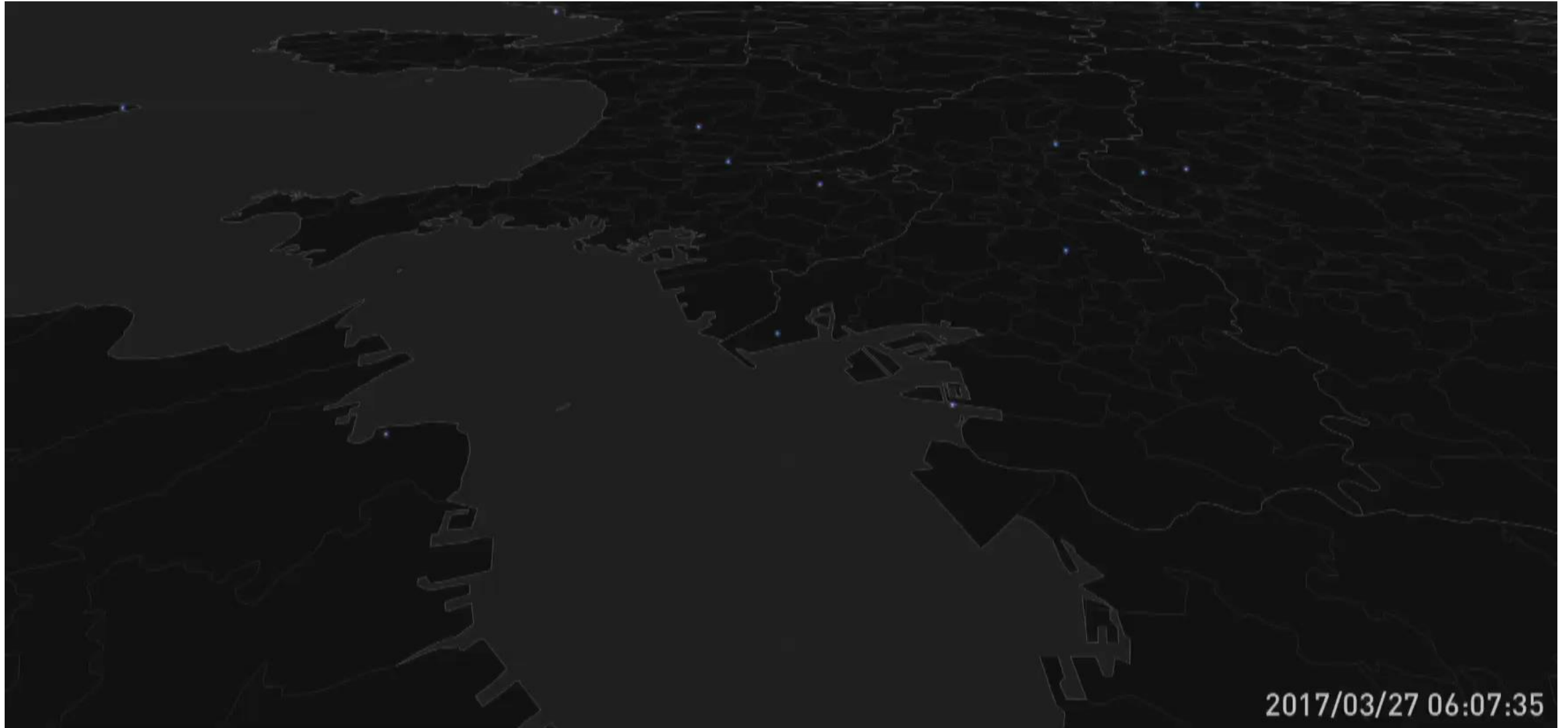
WIP Concept Visualization

T2 Conversion in 2020 : Domestic to International



WIP Concept Visualization

Haneda as Japan's Hub Airport



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Aiming at the World's Topnotch Airport

Most Reliable

Excellent Connectivity

Value Creation via Innovation

Super Clean and Congenial Ambience

Outstanding Service with "*Omotenashi*"
i.e., Heartfelt Hospitality

What We Do to Add Value to Airport Experience: (1)



Design

Robot

Lifestyle

What We Do to Add Value to Airport Experience: (2)



Absolute Safety



Outstanding Service

Accolades Received

The World's Top 100 Airports



2nd

Best Airports
60 million pax+ per year



2017

World's Best Domestic Airport



2013



2014



2015



2016



2017

Best Airport Terminal Cleanliness



2013



2014



2016



2017

Global Airport Ranking



2014



2015



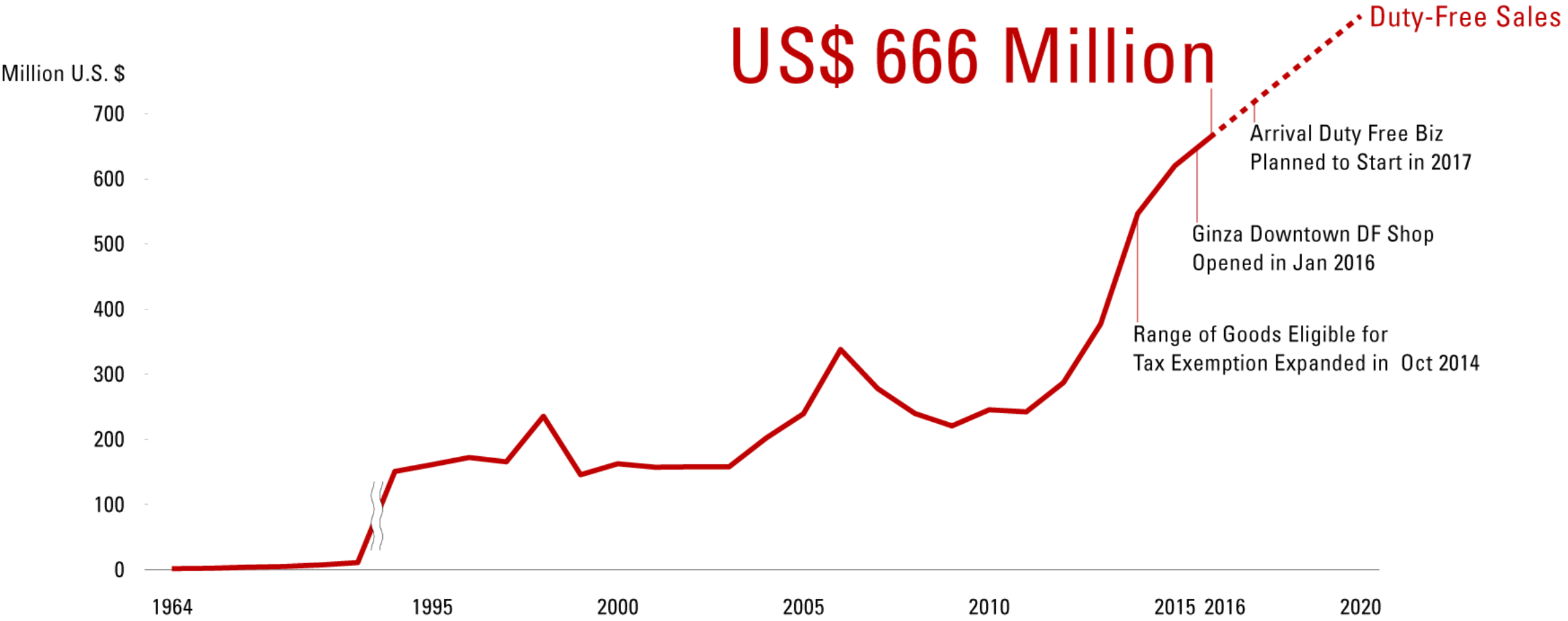
2016



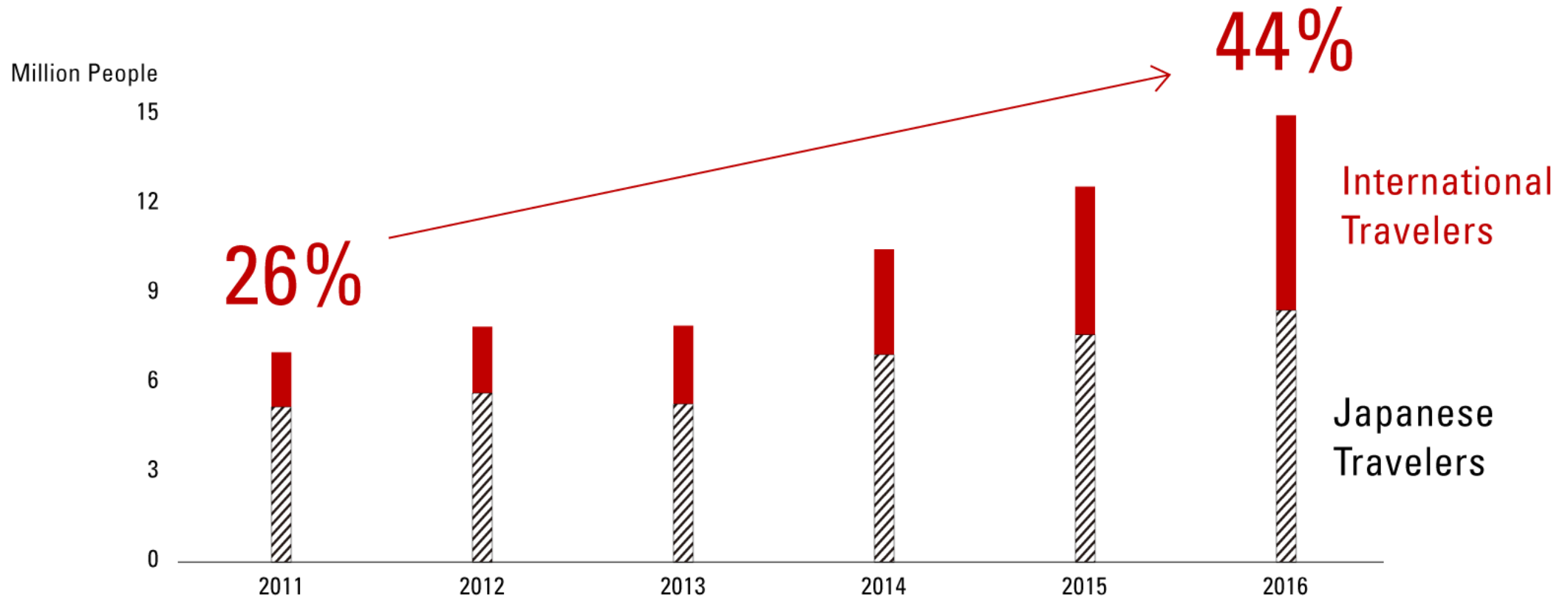
2017

2 Changing Landscape in DF & TR Business

Growth in JATCO's DF&TR Business, 1964-2020

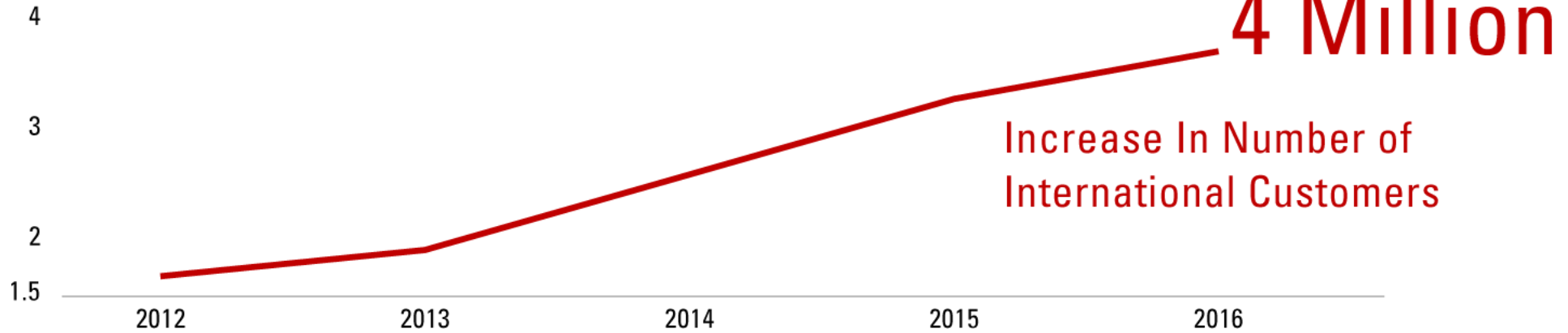


Upsurge in % Share of Inbound Traffic at Haneda

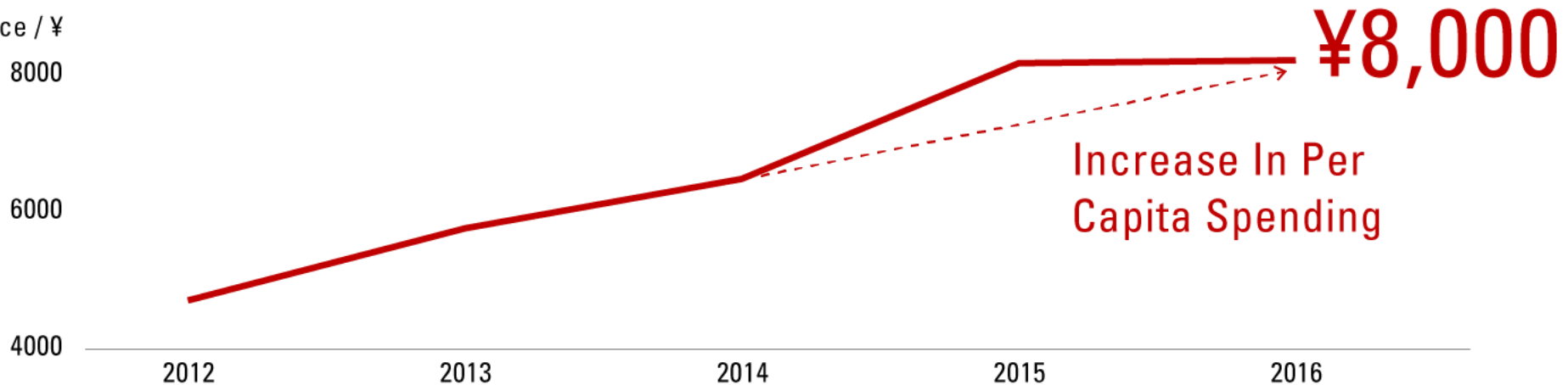


Growth in Int'l Customers and Per Capita Spending

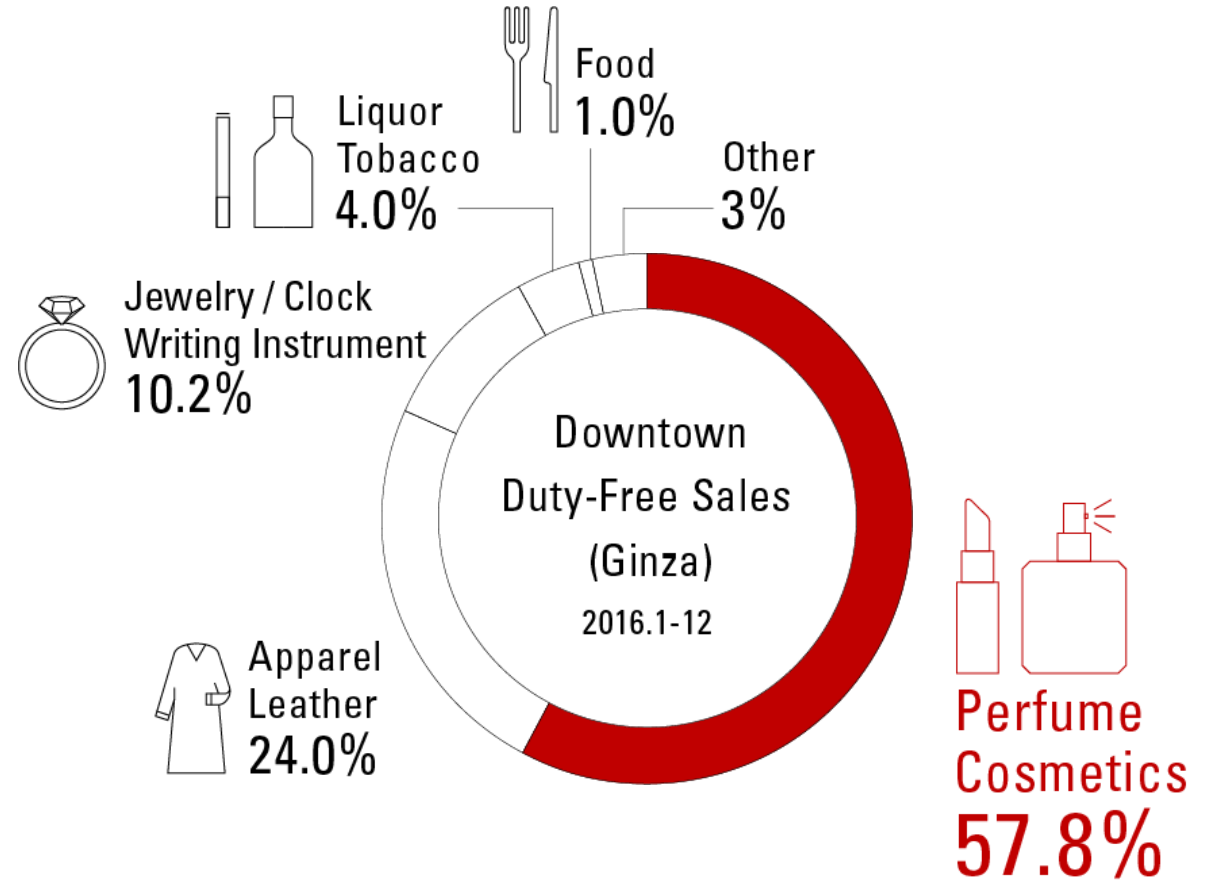
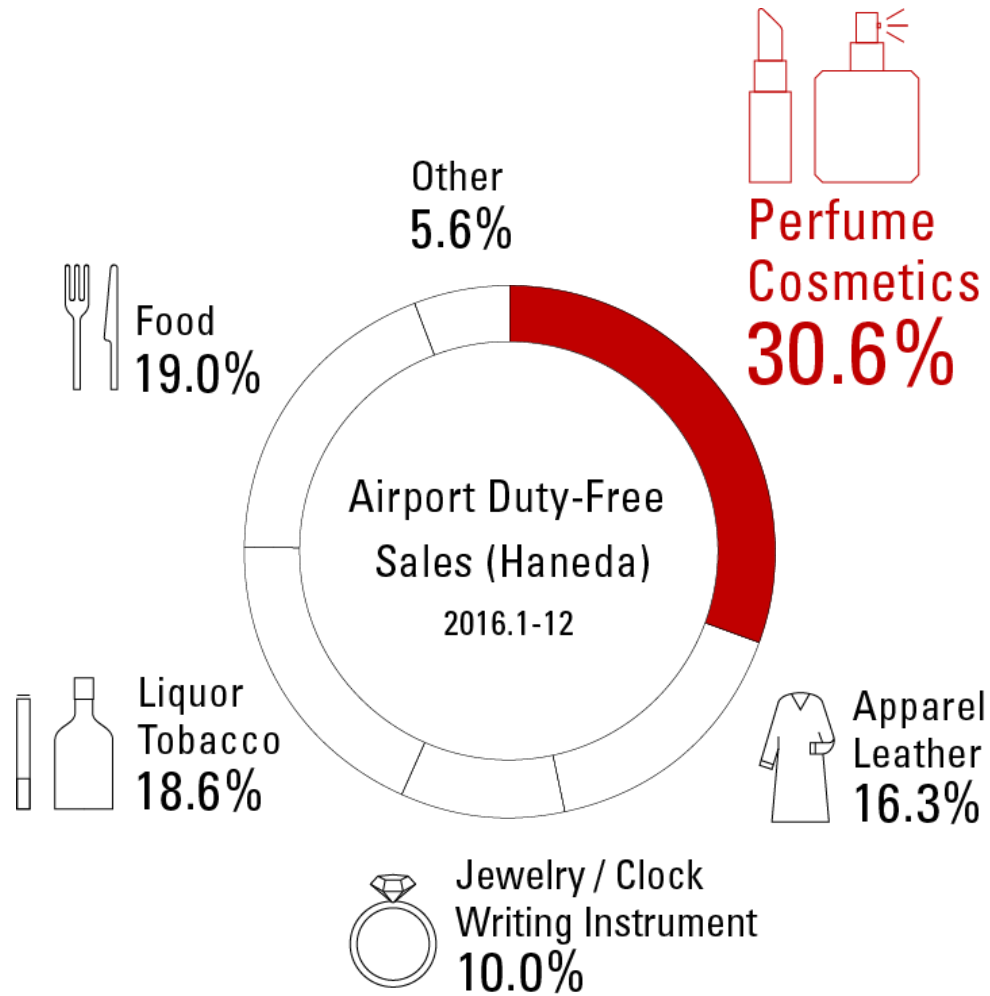
Million Passengers



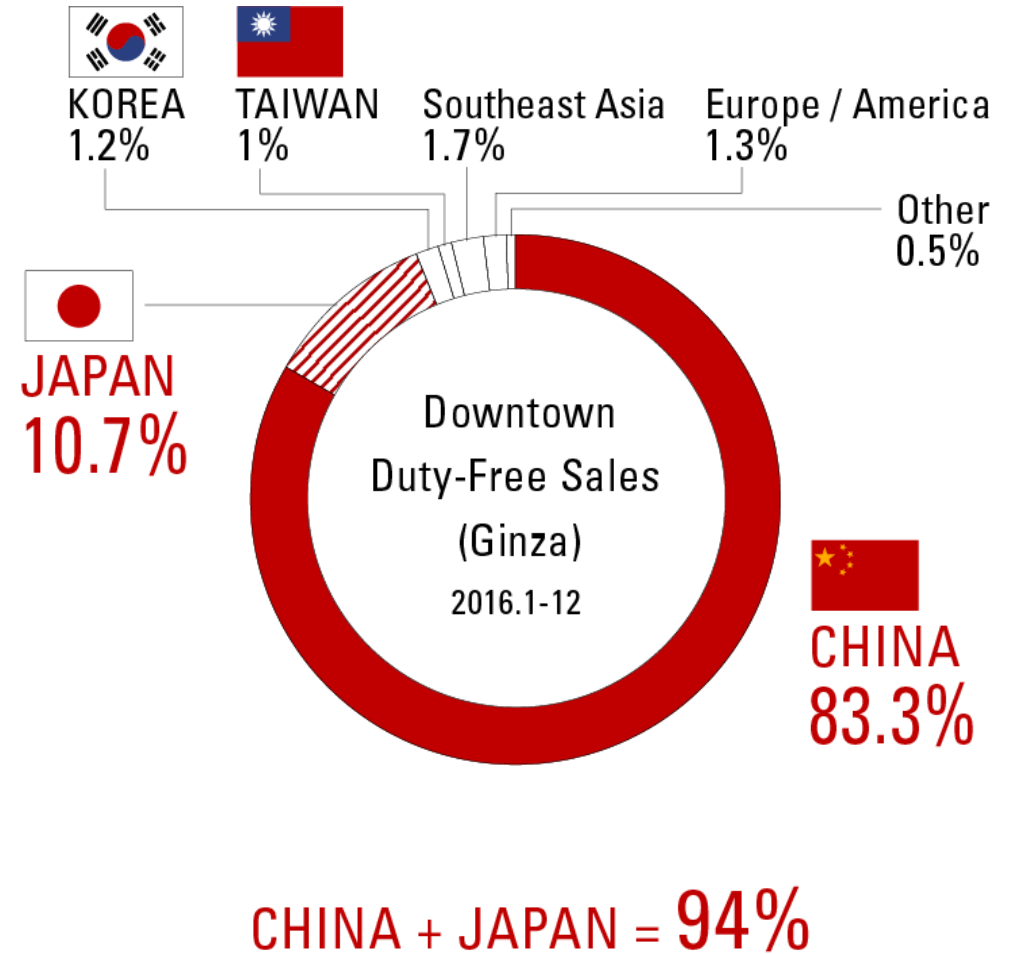
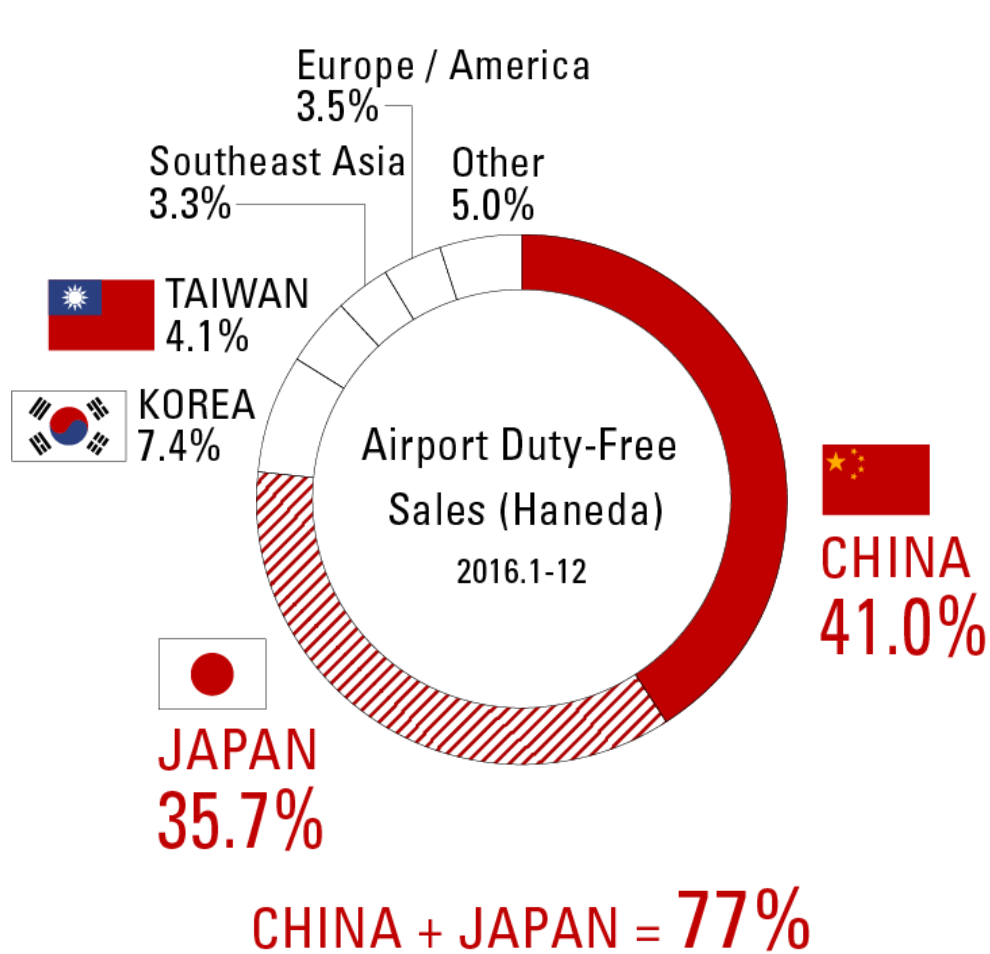
Customer unit price / ¥



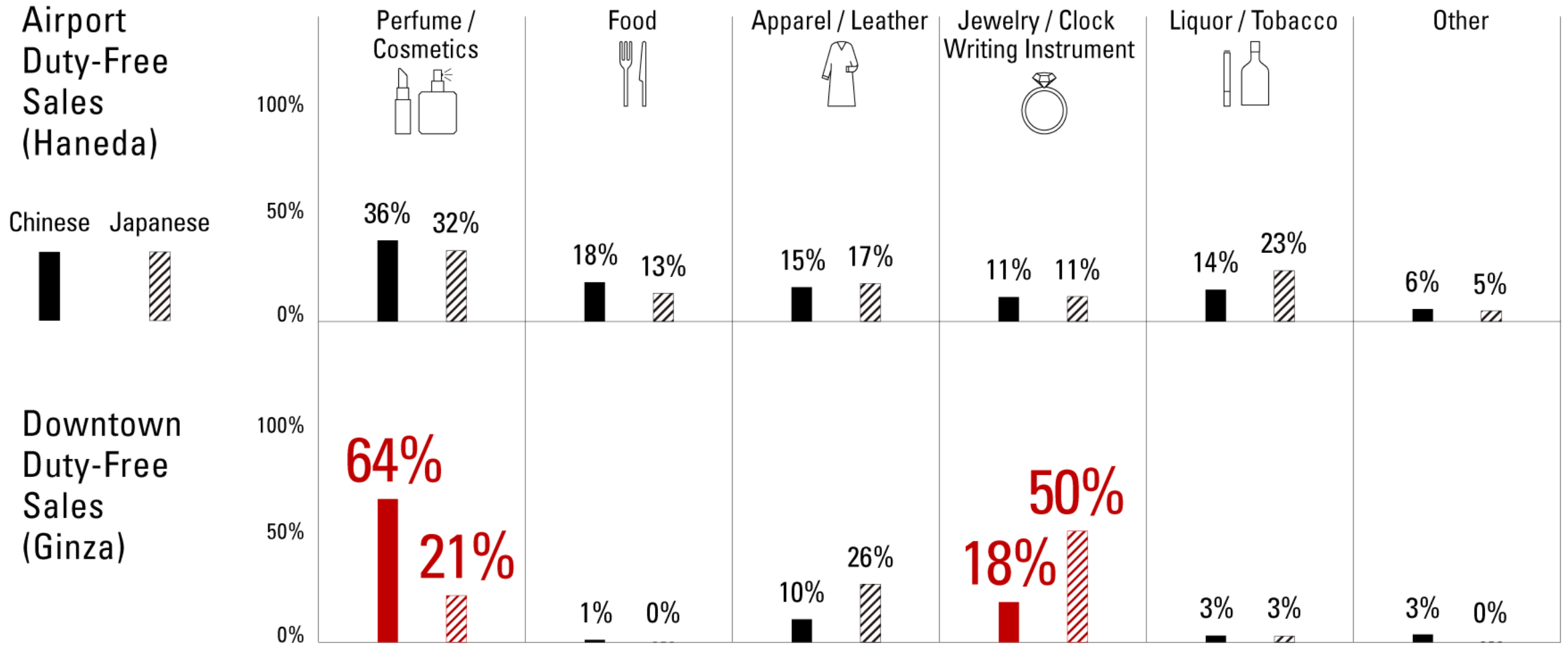
DF & TR Sales by Product Category: Airport vs Downtown



DF&TR Sales by Customer Nationality: Airport vs Downtown



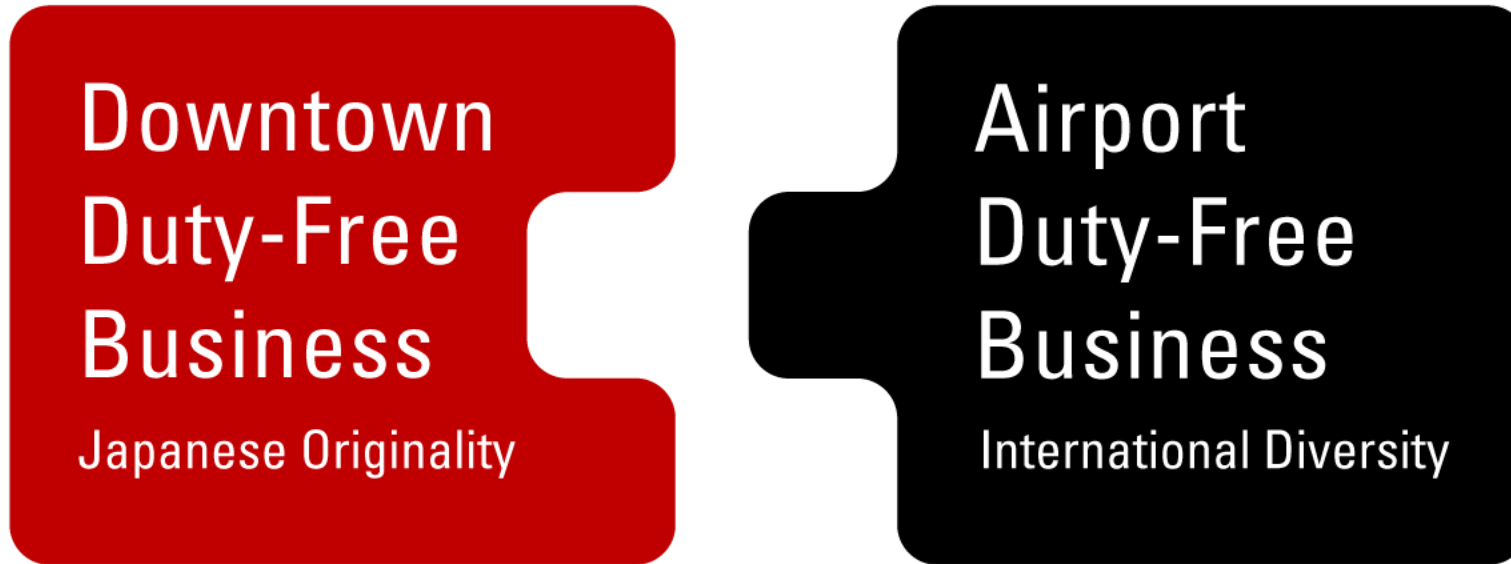
Comparison of DF & TR Sales by Product Category Between 2 Major Customer Nationalities



2016 1-12

3 Strategy For Duty Free & Travel Retail Business

Two Pillars of Our DF&TR Business



Business Reinforced

More Customization and Original Made-in-Japan Products in Downtown DF



Traditional Wood-Block Prints in Collaboration with Popular Cartoonist



Wide Range of Global Brands Available in Haneda Airport



4 Mission

Win-Win Proposition



Thank You