ALICE – JPIC webinar on the PI Maturity Model

Logistics problem in Japan & Japanese PI Roadmap

Tadashi Mizutani

Nomura Research Institute, Ltd.

28 April, 2026

NRI

Envision the value,
Empower the change

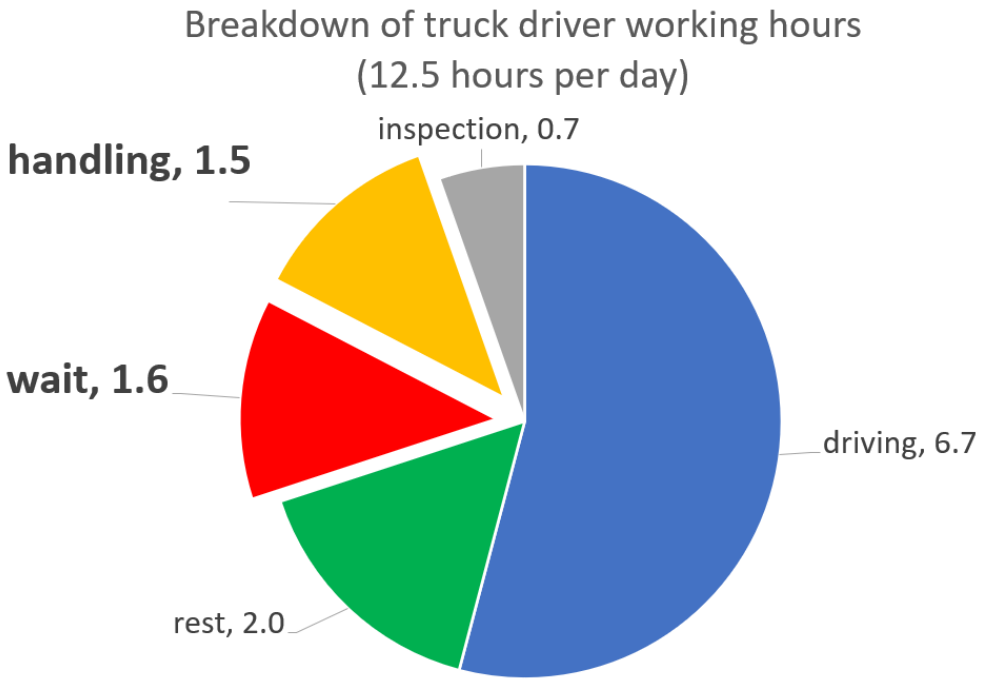
Logistics problems in Japan

■ Low truck fill rate

- Truck fill rate is **40%**
- In April of 2024, truck driver overtime was reduced to **960 hours per year**
- Estimated truck capacity shortage
  14% in 2024
  34% in 2030

■ Idle time of truck drivers

- **3 hours** for loading/unloading and waiting at warehouses



Source) https://www.cas.go.jp/jp/seisaku/buturyu_kakushin/dai2/siryou.pdf

Progress in legislation to improve logistics

Who must comply?

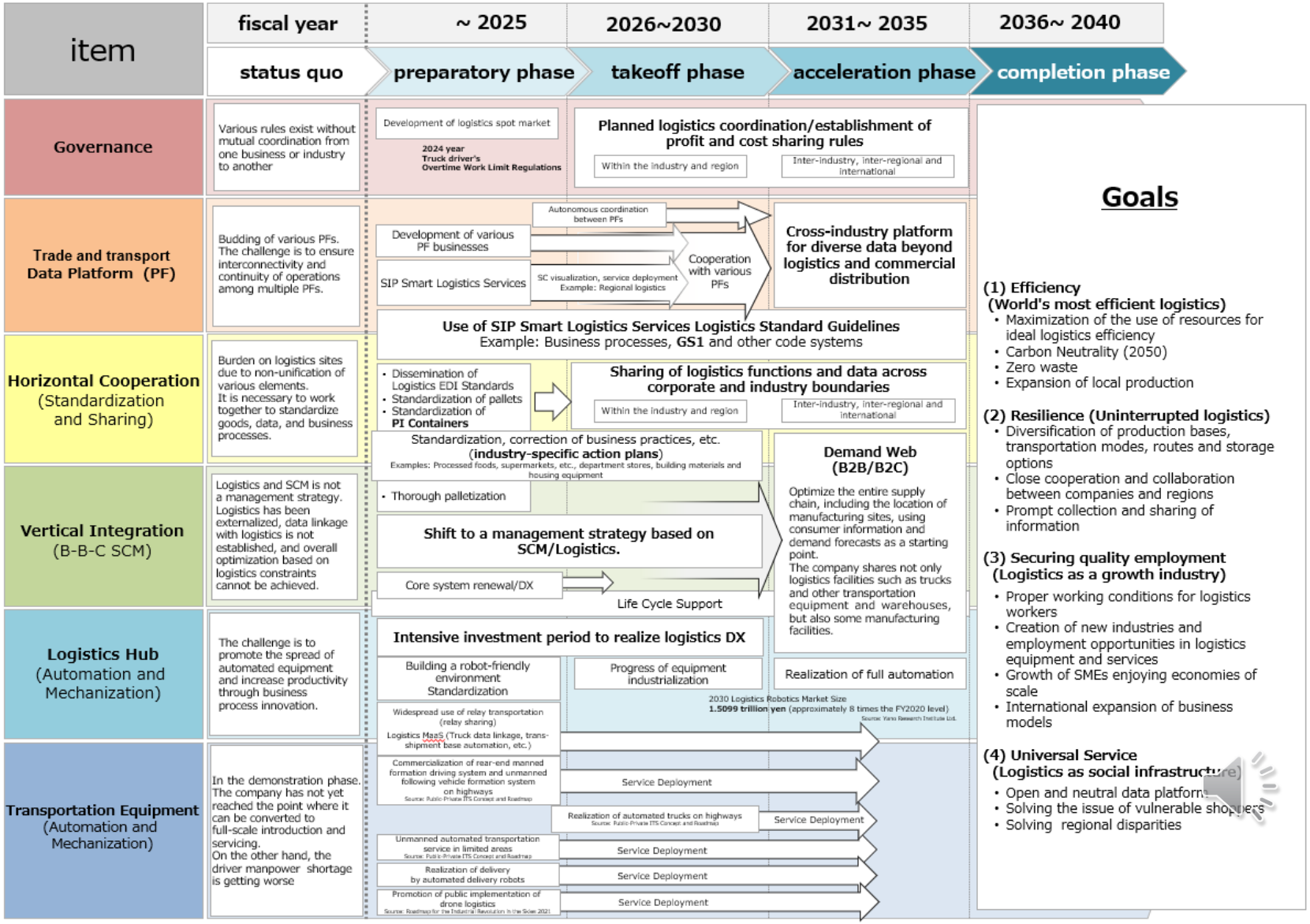
- They are required to declare to the authority by the end of May 2026
  - Sellers, Buyers, and Franchisers: Shipping or receiving cargos of more than 90K tons per year
  - Warehouse Operators: Holding cargos of more than 700K tons
  - Road Freight Carriers: Holding more than 150 truck fleets

What they need to do?

- Submit a medium/long term plan for logistics improvement --- by the end of October 2026
  - Submit at least once every 5 years even if there is no change in the plan
  - KPIs should be described
    - increase in the average cargo weight per trip per truck driver
    - reduction in driver's waiting and handling time (aiming for less than 2 hours per day)
- Submit an annual progress report
- Appoint a Chief Logistics Officer (for Sellers, Buyers, and Franchisers)

Japanese Physical Internet Roadmap

Progress in legislation to improve logistics



Source) https://www.meti.go.jp/press/2021/03/20220304005/20220304005-1.pdf

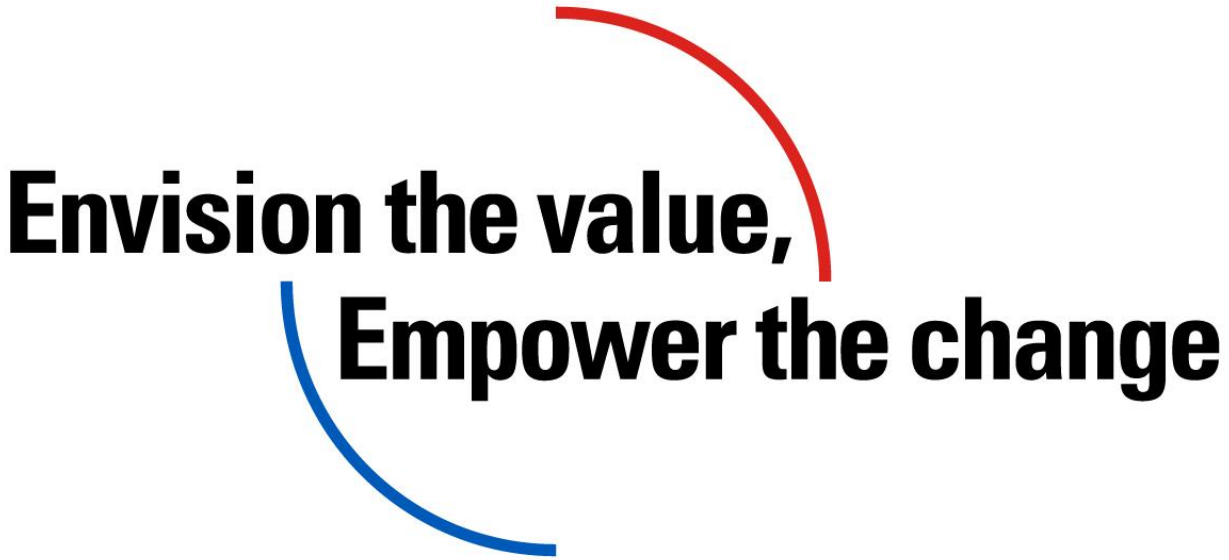
After the PI Roadmap was published

■Industry working groups formed

- Examples
  - Grocery
  - Apparel
  - Building materials
  - Chemicals
  - Pharmaceuticals
  - Home appliances

intra-industry
(not inter-industry)

■Need to measure the progress of these flagship projects and guide companies' collaborative actions


Envision the value,
Empower the change