



Case 1

Response to growing aviation demand

Enhancing airport terminal functions

As a corporate group responsible for the construction, management and operation of passenger terminals, Japan Airport Terminal Group, is implementing plans to expand airport terminal facilities. This will allow us as to respond effectively to the expected increase in demand, which is partly driven by the Japanese government's target of welcoming 60 million international visitors per year by 2030.

Passenger flow optimization; improvement of on-time flight rates

1. Connecting Terminal 2 north satellite to main building (due for completion in 2025)

We will connect the main building of Terminal 2 to the north satellite site, eliminating the need for dedicated buses to travel between the facilities. Three new boarding gates will be provided for optimal passenger flow and to improve the ratio of on-time flights.



Development of JR East Haneda Airport Access Line
By East Japan Railway Company and the Ministry of Land, Infrastructure, Transport and Tourism



Planned initiatives

Note: Steps to be taken by external businesses have been compiled by JAT based on the materials they have published.

Facility planning to reflect need for apron earthquake resistance and large new equipment

2. Construction of new Terminal 1 north satellite

We plan to construct a satellite facility on the north side of Terminal 1, in line with the government's requirement for apron upgrading.



Terminal 2

Terminal 1

Construction of new Keikyu lead track
By Keikyu Corporation and the Ministry of Land, Infrastructure, Transport and Tourism

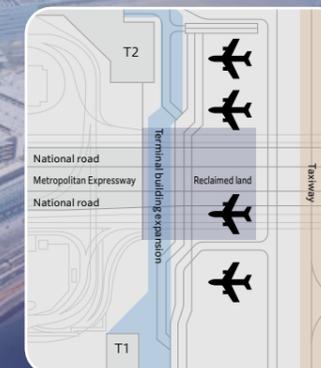
Terminal 3

Domestic-international flight connections to be more convenient

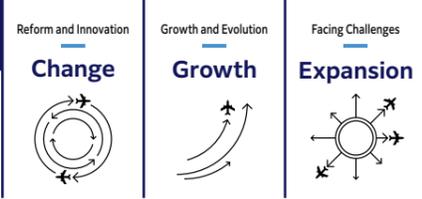
Government backing artificial land development

According to fiscal 2023 budget-related documents, the Civil Aviation Bureau of the Ministry of Land, Infrastructure, Transport and Tourism believes that Haneda Airport convenience would be improved were reclaimed land used to connect domestic and international flight facilities.

As a designated Haneda Airport facility operator, we are following closely trends in passenger demand, and conducting research and studies on a future T1-T2 terminal connection (development of a new international flight area) in conjunction with the government's consideration of artificial land development.



Note: Created by JAT based on the "FY2022 Civil Aviation Bureau related budget summary," issued by the Ministry of Land, Infrastructure, Transport and Tourism's Tokyo Civil Aviation Bureau.



Case 2

R&D center to collaborate with industries, solve airport issues

terminal.0 HANEDA

haneda innovation city

terminal.0

research & development for brand new airport

At the end of January 2024, we will open terminal.0 HANEDA within Haneda Innovation City, in which we are an investor. The new facility will serve as a research and development (R&D) base that will collaborate with a number of industries to solve airport problems. We will collaborate cross-sectionally with highly specialized companies and organizations to research and develop ways of boosting airport value.

We will set up co-working functions that participating companies can access daily and use as a forum to help stimulate inter-corporate collaborative research. We will use the expertise and technology of individual companies to conduct R&D together. Test field and presentation forums will be provided as R&D venues, and we hope that the results will be adopted by Haneda Airport and other airports around the world.



terminal.0 HANEDA

Location: Haneda Innovation City, Building C, 2nd and 3rd floors
Transportation access: Direct connection to Tenkubashi station on the Keikyu and Tokyo Monorail Lines
Purpose: To provide coworking space for corporate participants
Ancillary facilities: Corporate booths, private rooms, conference rooms, event spaces, and more

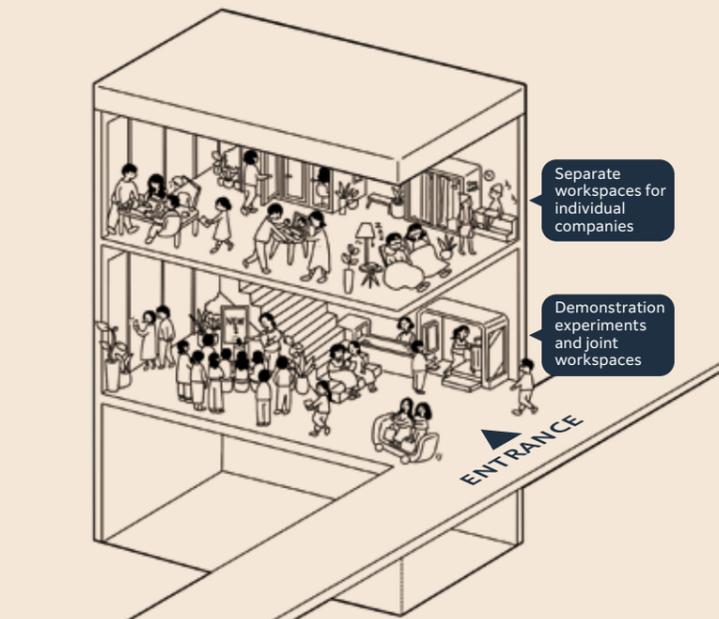
Haneda Innovation City

This is a center developed through public-private collaboration by Haneda Mirai Kaihatsu Co., Ltd. and Tokyo's Ota Ward. The commercial and business complex, it has two core areas of focus: cutting-edge technology and culture. At the center, future-oriented urban development that creates and disseminates new experiences and value is mapped out. Our location, adjacent to Haneda Airport, is advantageously positioned for the dissemination of information domestically and internationally.

Business entity: Haneda Mirai Kaihatsu Co., Ltd.
Address: 1-1-4 Haneda Airport, Ota-ku, Tokyo
Access: Direct connection to Tenkubashi station on the Keikyu and Tokyo Monorail Lines

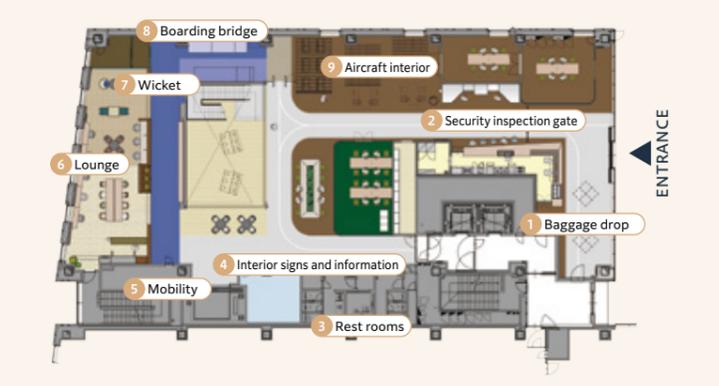


Haneda Innovation City Building C



terminal.0 2nd floor section (demonstration experiments and joint workspaces)

Mockup featuring airport equipment and functions, and aircraft onboard equipment



terminal.0 3 functions

Collaboration and exchange	<p>JAT will take the lead in creating development themes and promoting information exchange and interaction among participating companies.</p> <p>Sharing airport issues and needs on a daily basis</p> <p>To share the issues facing airports, JAT will hold discussions with its 19 Group companies that conduct facility management operations, merchandise sales, and food and beverage business at airports, as well as the airlines.</p> <p>Holding events to encourage terminal.0 management and co-creation</p> <p>To continue to be a more effective and active facility organization in order that we might be adopted by airports, we will reflect the opinions received from individual companies in our operation of the facility. We will also hold various events to stimulate communication and information exchange among participating companies.</p>
Demonstration experiments	<p>A mockup featuring airport equipment and functions, as well as aircraft equipment will be set up in terminal.0.</p> <p>Reproducing airport functions and passenger flow within the facility allows for highly selective demonstration experiments.</p> <p>Participating companies will be able to conduct accurate demonstrations, in the hope of being adopted by Haneda Airport. Note. We aim to be adopted by Haneda Airport once security and safety have been confirmed and demonstration experiments held.</p>
Announcements and Presentations	<p>Creating a place to present research content and results</p> <p>Venue for announcing verification and results of demonstration experiments</p> <p>The demonstrations at terminal.0 will be expanded to our operational departments in the hope that they might be adopted by Haneda Airport.</p> <p>Creation of dedicated website and publication of annual reports</p> <p>We will open a website exclusively for terminal.0 and compile annual reports on our research results for public dissemination.</p>

Goal of terminal.0 co-creation

The functions and services researched at terminal.0 will encourage collaboration between different industries and combine the expertise and technology of each company to create new value and solutions for Haneda Airport.

Security checkpoint (example)

Until now Priority on performance and operation



Facility management: Safety and security
 Issues (customer feedback): Congestion, trouble, poor and slow employee response
 Psychological factors: Irritation, tedium, inconvenience

Undeveloped fields

In the future Priority on performance and management + co-creation space for people and things



Facility management: Safety and security
 Issues (customer feedback): New awareness and discovery of issues
 Psychological aspect: Relaxing, comfortable transit

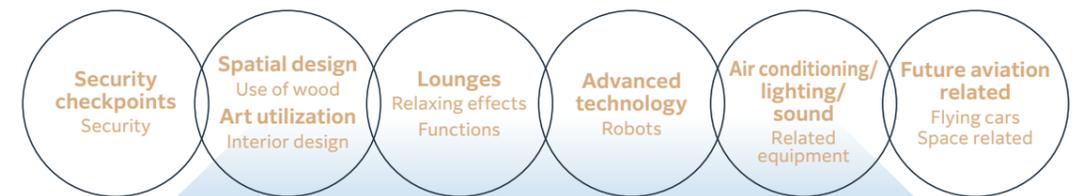
Reduction of stress and creation of excitement

- Fusion of different industries and fields (participating companies)**
- Fragrance: Cosmetics manufacturers
 - Airflow: Air conditioning and equipment manufacturers
 - Sound: Audio manufacturers and entertainment companies
 - Illumination: Lighting manufacturers and sign-related businesses
 - Color: Architecture companies, design companies

terminal.0 research and development topics

While working to improve existing airport functions, for example by reducing stress at security checkpoints and using cutting-edge robots, we will also look to the future. We will research and develop the use of flying cars and the possibility of terminal functions in an era when Japan has a more advanced space industry and the concept of transportation takes on new forms.

Examples of R&D topics



Expected participating companies

Manufacturers, IT companies, venture companies (startups), healthcare businesses, spatial design enterprises, construction companies, local airports, secondary transportation operators, space organizations, and others.

Case 3

Enhancing the customer experience

Realizing retail business unique to airports

By pursuing customer service at physical stores within Haneda Airport and using and combining e-commerce and online services, we will improve the value of both formats and maximize the value of the customer experience. In addition, by increasing touchpoints with customers, we will appeal to air passenger and general customers alike. This will allow us to expand and revitalize our retail business, as well as create a profit structure that no longer depends solely on airline passengers.

Evolution of E-commerce

Enhancing E-commerce site

Duty free merchandise reservation site

This service allows customers to pre-order duty-free items on the reservation site and pick them up at the airport. This improves pre-trip experience value and pre-boarding convenience.



Domestic EC site

This e-commerce site sells products exclusive to Haneda Airport in addition to standard souvenirs and farm-fresh products. By leveraging the strength of having physical stores and our e-commerce site, we will provide new value for our customers.



Global EC site

We are developing global e-commerce sites, including the flagship stores we are opening on cross-border e-commerce sites for China (T-mall, etc.).



New service development

Start of in-store merchandise pickup service

By using the existing Click & Collect service available on duty-free product advance reservation sites, we offer HANEDA PICK UP, a service that allows customers to pick up products ordered on the HANEDA Shopping domestic e-commerce site at a dedicated pick-up counter at our Haneda Airport store. We will continue offering new services to improve customer convenience and provide more valuable experiences.



Growth and revitalization of retail business through synergistic effects, such as the combination of physical stores with E-commerce

Maximization of customer experience value

Cultivation of new customer segments
 Capture of revenue not dependent on air passengers

Omnichannel support

Increase in customer touchpoints

In addition to physical stores, we will use the official Haneda Airport app, SNS, email newsletters, and other media to increase customer touchpoints and build an omnichannel network.



Physical stores at Haneda Airport

We operate approximately 100 directly managed domestic stores and duty-free stores at Haneda Airport Terminals 1, 2, and 3.



Domestic stores

Duty-free stores