



第2回航空機燃料不足の対応に向けた官民タスクフォース会議

Second Meeting of Public-Private Task Force on Jet Fuel Shortage

プレゼン資料

Presentation Material

在日航空会社代表者協議会

Board of Airline Representatives in Japan (BOAR)

2024年6月26日

June 26, 2024



BOAR（在日航空会社代表者協議会）の紹介

Introduction of BOAR

概要

名称	BOAR (Board of Airline Representatives in Japan)
目的	<ul style="list-style-type: none">• 日本の航空問題や会員共通の課題に係る協議• 政府など関係機関に対する問題提起、意見表明• 政府職員など関係者との会合機会の提供
会員資格	日本に定期便を就航し、事務所を構えるエアラインの任意親睦団体
役員	<p>議長 : 桐山 謙一 (United)</p> <p>副議長 : 寺村 光代 (FedEx)</p> <p>運営委員 : Air France, Delta, Etihad, JAL, Lufthansa, UPS</p> <p>事務局長 : ANA</p> <p>その他 : 総会にはIATA（国際航空運送協会）に加え、成田・羽田・中部・関西・福岡空港の各AOC*代表者がオブザーバー参加</p> <p>*AOC=Airline Operators Committee</p>
総会活動	原則奇数月最終水曜日(7月除く)開催

会員一覧 * 2023年5月時点：44社（本邦2社を含む）

TC1米州 (7社)	TC2欧州・アフリカ (11社)	TC3アジア・太平洋 (22社)	貨物 (4社)
Aeromexico, Air Canada, American, Delta, Hawaiian, LATAM, United	Aeroflot, Air France, ITA Airways, Emirates, Ethiopian, Etihad, KLM, Lufthansa, Qatar, SAS, Turkish	Air Caledonie, Air China, Air India, Air New Zealand, Air Tahiti, Asiana, Cathay Pacific, China Airlines, EVA, Garuda, Malaysia, Pakistan, Philippine, Qantas, Scoot, Singapore, SriLankan, Thai, Vietnam, Cebu Pacific, JAL, ANA	Cargolux, FedEx, UPS, Lufthansa Cargo

二国間民間航空運送協定 Bilateral Air Services Agreement

- ◆ 外国航空会社は日本政府と本国政府間の民間航空運送協定が締結されることにより日本への乗り入れが可能になる。
- ◆ その協定により運航可能な乗り入れ空港、便数などが規定される。
- ◆ 二国間民間航空運送協定では通常、それぞれの国において**公平で平等な競争機会**が担保されている。

Bilateral air services agreements and consultations

International air transport is essential for international movement of persons and goods. An important issue for air transport is to ensure international routes and capacity which adequately meet the users' needs. Consultations with other countries concerning air services have been conducted diligently in order to further expand international aviation network and promote competition **based on equitable opportunities** through increasing of points and capacity, establishment and expansion of code share arrangements or new air services agreements.

(Source: https://www.mlit.go.jp/koku/15_hf_000022.html)

BOARメンバーコメント・懸念

BOAR Members' Comments/Concerns on Fuel Shortage in Japan

- ◆ 元売り会社による機材の大型化への対応不可（成田）
Denial by fuel suppliers to support capacity increase (bigger type of airplane) (NRT)
- ◆ 空港における給油ができないため本国より帰路の燃料も搭載、タンカリング（成田）
Tankering (NRT)
- ◆ 1年前に需要予測を元売り会社へ提出要請（主要空港）
Submission of demand outlook to fuel suppliers one year ahead (major Japanese airports)
- ◆ 給油業務の人手不足による給油業務の遅延（関西）
Delay in fueling due to manpower shortage (KIX)

想定されるインパクト Likely Impact

- ✓ ジェット燃料不足は日本の固有の問題であり、航空機運航にかかわる基本的サポートが得られないため、公平な競争機会が確立できない
Jet fuel shortage is a Japan specific issue, raising a question on the establishment of equitable competition opportunities
- ✓ 航空機の離陸最大重量は決まっているため、タンカリングを行うことにより、運ぶことができる旅客数、貨物量を減らさなくてはならない
Due to MTOW, tankering causes reduction of number of passengers and cargo weight
- ✓ 各航空会社は世界経済動向を鑑みネットワーク構成を決めるため、1年前の燃料需要予測提出は困難
Submission of fuel demand outlook well ahead is unfeasible, as airlines determine flight network by closely monitoring global economy
- ✓ 時間通りに航空機が離陸できない場合、パイロットの業務時間にも影響が出るため欠航になりかねない
If on-time departure is affected, it may cause impact on crew duty hours, which may trigger a flight cancellation

BOARの要望 BOAR's Requests

航空機燃料を安定的に供給できる体制の構築に向けた取組に向けて
For stable jet fuel supply

短期 Short-term

- ◆ 給油業務の人材確保
Secure manpower for fueling
- ◆ U/Lルール免除
Exempt from U/L rule

長期 Long-term

- ◆ 二国間民間航空運送協定で担保されているそれぞれの国において
公平で平等な競争機会を確実にする
Ensure **equitable competition opportunities** stipulated in bilateral air services agreements
- ◆ 日本における主要空港における国際競争力の増強
Enhance international competitiveness of major Japanese airports



May 31, 2024

His Excellency Ken Saito
Minister
Ministry of Economy, Trade and Industry
1-3-1 Kasumigaseki, Chiyoda-ku, Tokyo
100-8901 Japan

Subject: Request for stable supply of jet fuel at airports in Japan

Dear Minister Saito:

First of all, Board of Airline Representatives in Japan (BOAR) would like to express our sincere appreciations to your great support for smooth air operations in and out of Japan by 44 BOAR member airlines consisting of passenger and cargo carriers.

Today, I am writing to attract your attention to the difficulties that foreign carriers are facing for air operations at the airports in Japan and cordially request to take actions for solutions.

Status: Shortage of jet fuel.

Many airlines operating into Japan have been told about the tight jet fuel supply by the fuel suppliers in Japan. With the status, some airlines had to give up the increase of flight frequencies into Japan or opted to conduct so called tankering operations (fueling at the origin not only for the necessary fuel to Japan, but also for a return flight to the next destination), leading to the reduction of the number of passengers or air cargo volume. As for new airlines to Japan, some could not start flight operations to Japan due to the said issue.

Request: Ensuring stable supply of jet fuel.

Jet fuel is byproduct of the crude oil refining process. With the declining demand to gasoline, fuel suppliers in Japan, we understand, must manage the production volume of gasoline over the past recent years, resulting in less volume of jet fuel available for airlines. Closure of refining facilities in Japan have increased the demand for fuel vessels to transport of gasoline and jet fuel domestically, which are also in shortage due to manpower issues. The industrial trend will not be altered unless the government takes actions to secure jet fuels by supporting the players like fuel suppliers and vessel operators who have been going through tough transformation. We sincerely request to look into their issues associated with the shortage of jet fuel in Japan for solutions, or seek for creative solutions.

Lastly, inbound tourism has been recovering very quickly, contributing to the Japanese economy by a great deal to recover from the impact of COVID-19. Air cargo is also critical for the transportation of commodities required to support many Japanese industries. As such we sincerely hope you will take actions quickly.

Once again, we would like to emphasize our appreciations for your continued support and understanding to our airlines.

Yours sincerely,



Kenichi Kiriya
Chairperson of the Board of Airline Representatives in Japan c/o United Airlines

THE BOARD OF AIRLINE REPRESENTATIVES IN JAPAN

TOKYO