

# Outline of Honshu-Shikoku Expressway routes

- The Honshu-Shikoku Expressway routes consist of the E28 Kobe-Awaji-Naruto Expressway connecting Hyogo and Tokushima Prefectures, the E30 Seto-Chuo Expressway connecting Okayama and Kagawa Prefectures, and the E76 Nishi-Seto Expressway connecting Hiroshima and Ehime Prefectures.
- These roadways are used for various purposes, including daily life as well as business and tourism, and they play a vital role as traffic arteries in the Setouchi area.



**E76 SHIMANAMI  
EXPWY**  
(Nishi-Seto Expressway)

**E30 SETO CHUO  
EXPWY**  
(Seto-Chuo Expressway)

**E28 KOBE-AWAJI-NARUTO  
EXPWY**  
(Kobe-Awaji-Naruto Expressway)

# Changes in the 3-hour zone

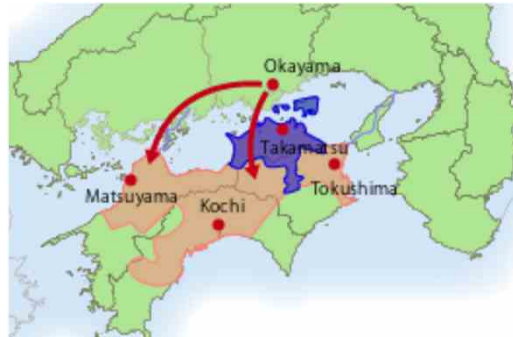
- Thanks to improvement of the expressway network, the area within 3 hours of major cities in the Setouchi area has greatly expanded.
- For example, in 1985 only Awaji Island was within 3 hours of Tokushima city, but now the majority of Osaka, Hyogo, and Okayama Prefectures are within reach, using the Kobe-Awaji-Naruto Expressway or the Seto-Chuo Expressway .

## ■ Changes in the 3-hour zone from each city in the prefecture

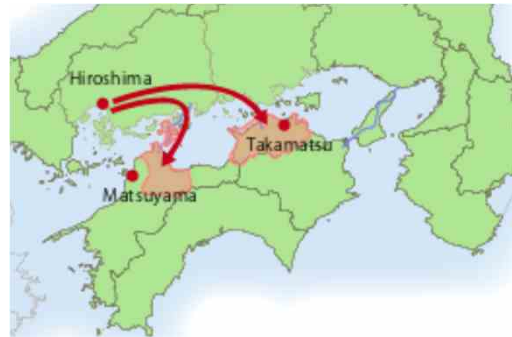
[From Kobe city]



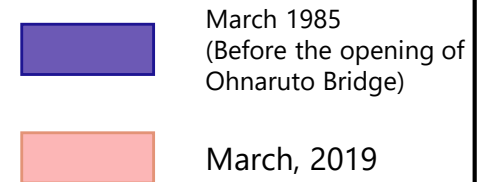
[From Okayama city]



[From Hiroshima city]



Cities, towns, and villages on the Honshu side and Shikoku side which can be reached within 3 hours from each city in the various prefectures



[From Tokushima city]



[From Takamatsu city]



[From Matsuyama city]



[From Kochi city]

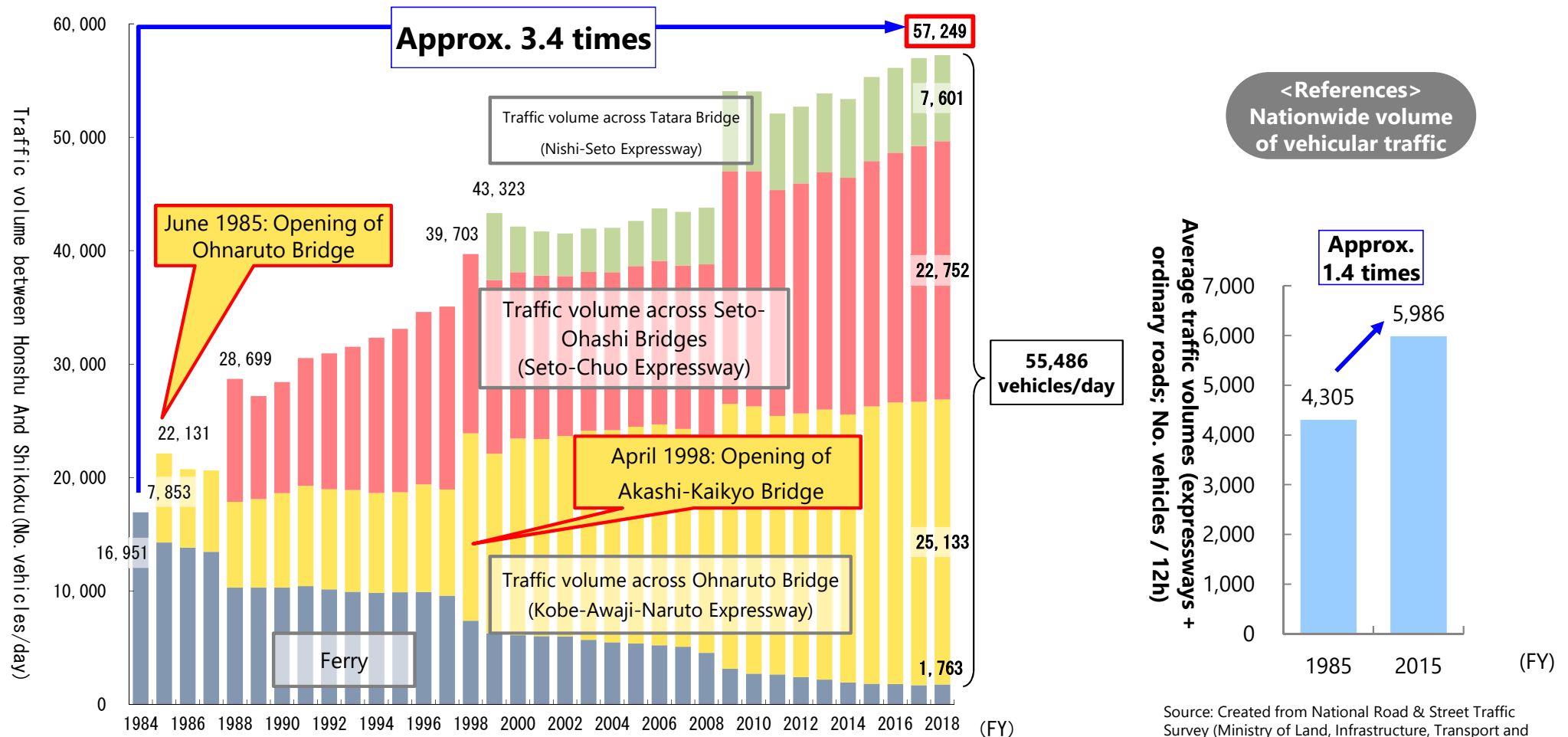


Note: 3-hour zone by car

Source: Created based on the National Road Time Table (National Association for Promotion of Road Improvement) and the National Ferry/Passenger Vessel Guide (Daily Maritime Communication Company), among others.

# Trends in automobile traffic volume between Honshu and Shikoku

- The traffic volume between Honshu and Shikoku has dramatically increased due to the opening of the Honshu-Shikoku expressway routes.
- Comparing FY 2018 with FY 1984, before the opening of the Ohnaruto Bridge, the volume of vehicular traffic between Honshu and Shikoku has increased about 3.4 times.
- Nationwide, the volume of vehicular traffic increased about 1.4 times when comparing FY 1985 and FY 2015.



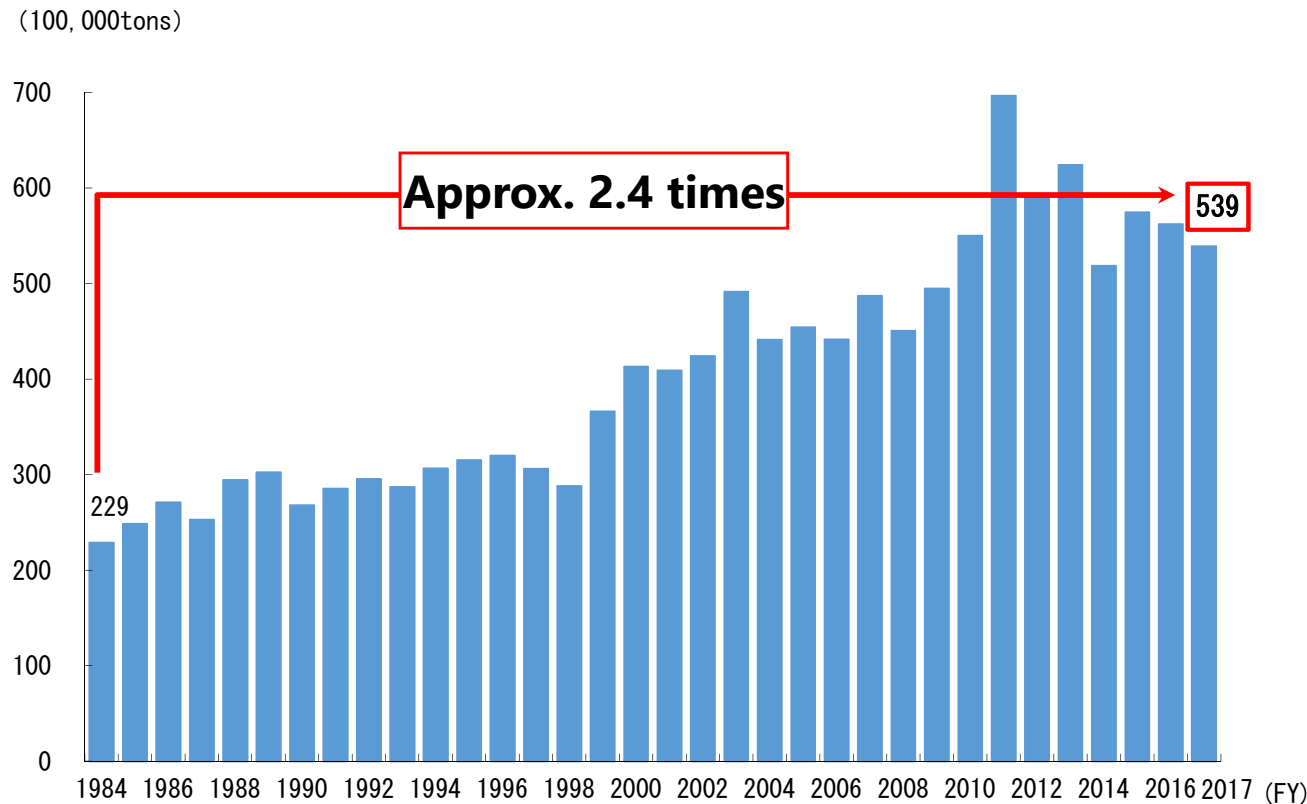
Source: Created from HSBE documents, Transport Movement in Shikoku (Shikoku Transport & Tourism Bureau)

Source: Created from National Road & Street Traffic Survey (Ministry of Land, Infrastructure, Transport and Tourism)

## Changes in volume of freight flow between Shikoku and the rest of Japan

- Comparing FY 2017 with FY 1984, the volume of vehicular freight between Shikoku and the rest of Japan increased about 2.4 times.
- The volume of vehicular freight among blocs across Japan during the same period increased about 1.2 times.

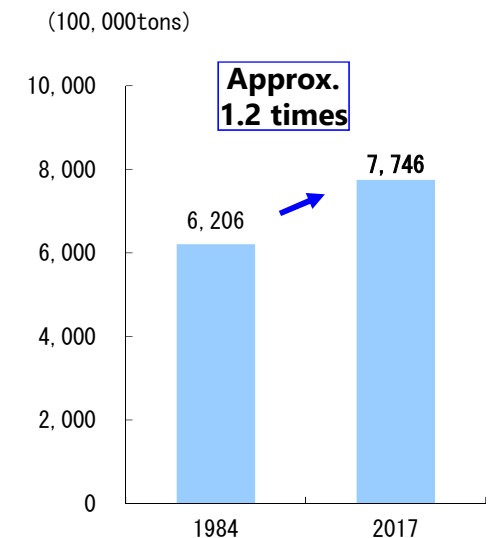
### ◆ Changes in volume of vehicular freight flowing to and from Shikoku



Note: Does not include intraregional flows

Source: Created from Freight & Passenger Regional Flow Survey (Ministry of Land, Infrastructure, Transport and Tourism)

### <References> Volume of vehicular freight flow among blocs nationwide



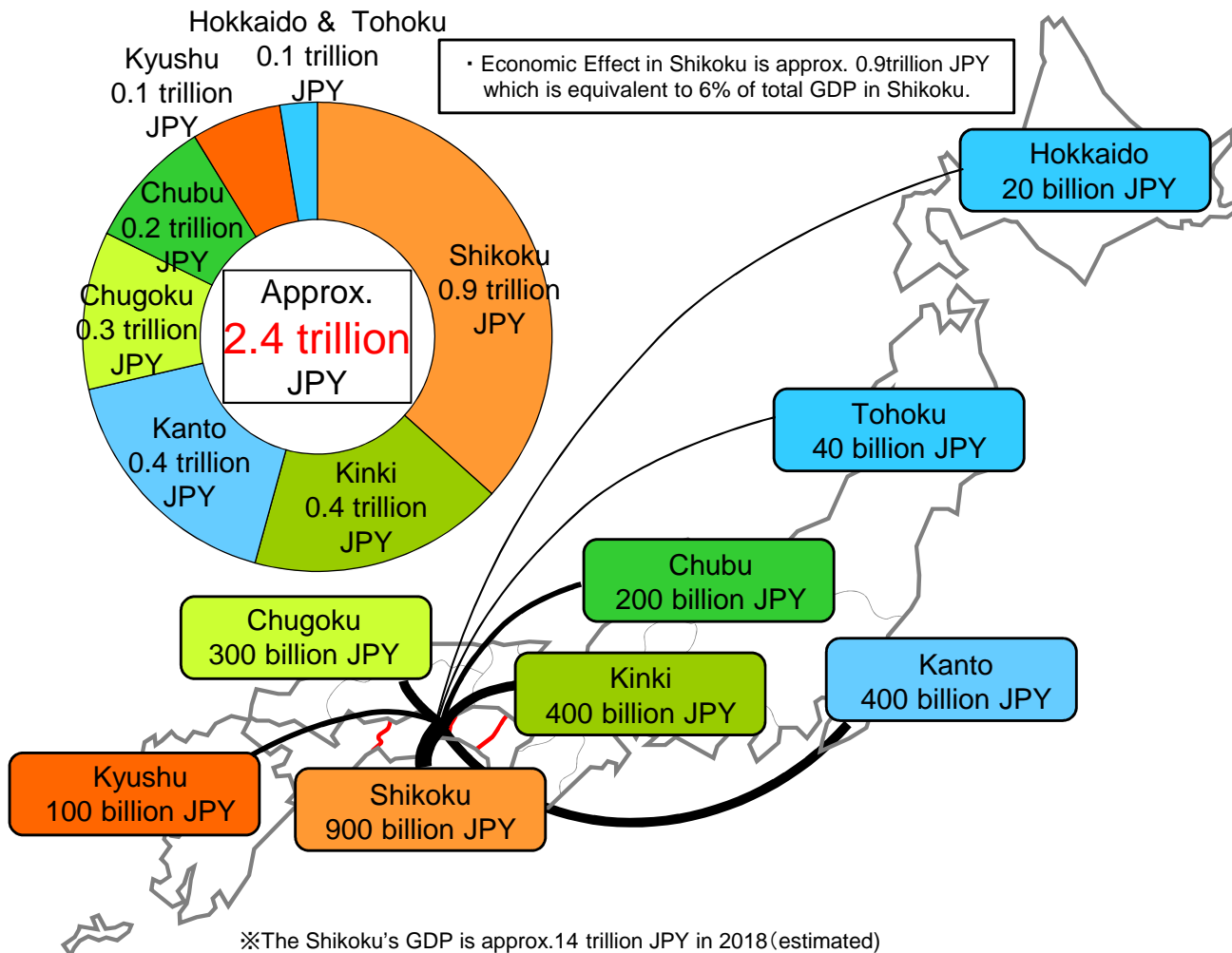
Note: Does not include intraregional flows

Source: Created from Freight & Passenger Regional Flow Survey (Ministry of Land, Infrastructure, Transport and Tourism)

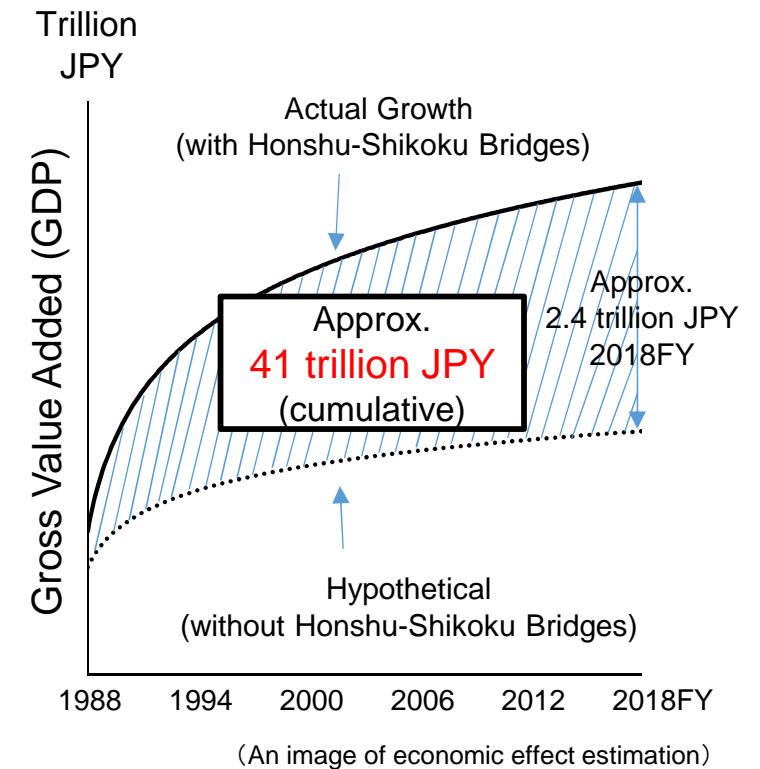
# Economic Effect of Honshu-Shikoku Bridges

- To grasp quantitative effect of Honshu-Shikoku Bridges to Japan's economy, the economic effect was measured.
- The Economic Effect of Honshu-Shikoku Bridges extends nationwide, Economic Effect in FY2018 is approx. 2.4 trillion JPY. In the Effect, Economic Effect in Shikoku is approx. 0.9 trillion JPY which is equivalent to 6% of total GDP in Shikoku.
- Cumulative Economic Effect from FY1988 to FY2018 is approx. 41 trillion JPY.

## ■ Economic Effect FY2018



## ■ Economic Effect FY1988 - 2018



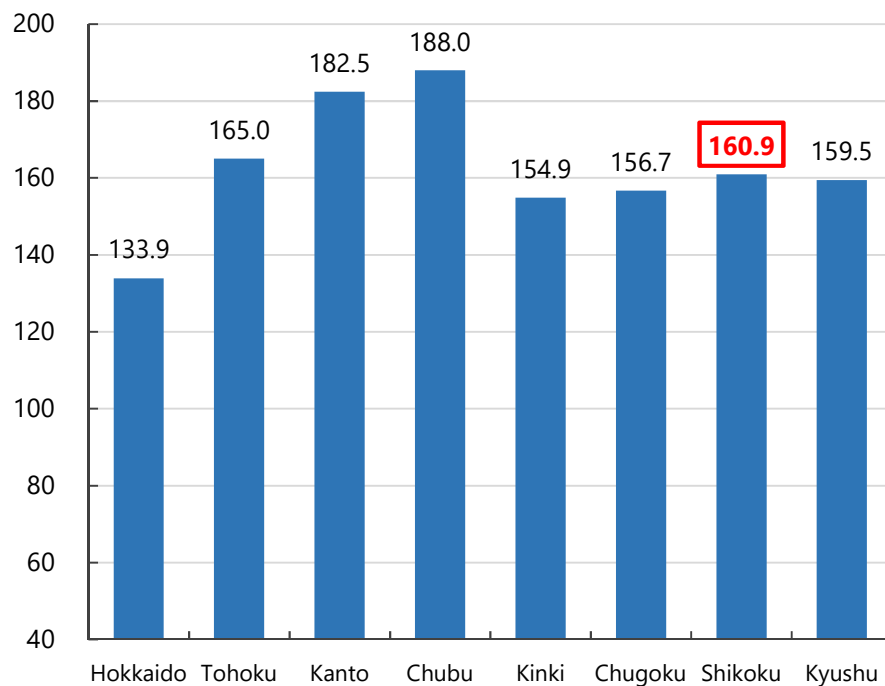
Source: Created based on Inter-Regional Input-Output Table (Ministry of Economy, Trade and Industry)

# Productivity improvement in the Shikoku region

- Growth in the total production in Shikoku region is higher than other regions in Japan, as well as the growth in Chubu, Kanto, and Tohoku regions.
- In terms of growth in per capita income, the Shikoku region is the third highest.

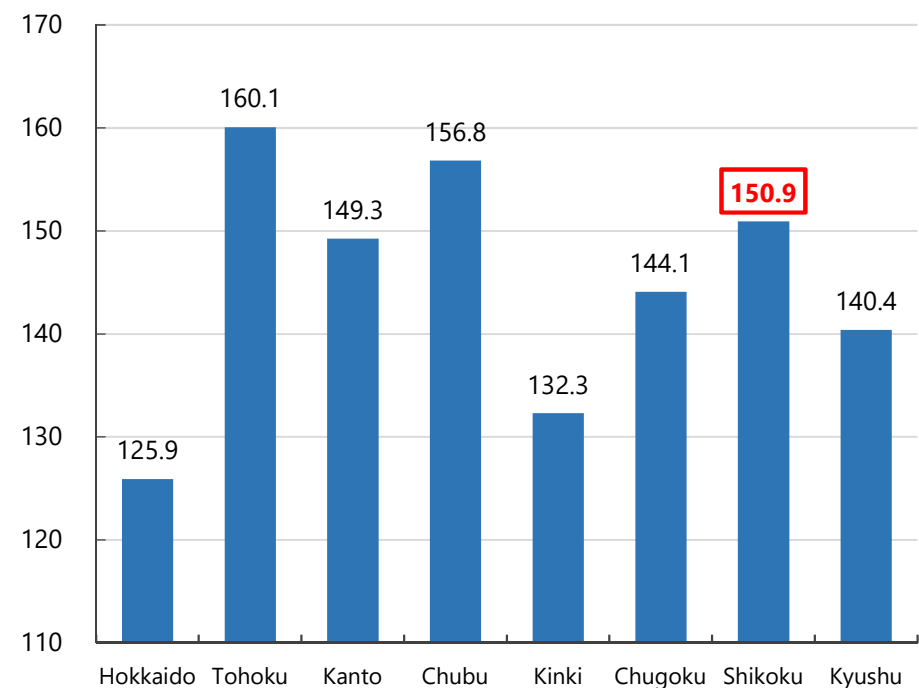
**Growth in total production by region  
(2015/1985)**

(1985=100)



**Growth in per capita income  
(2015/1985)**

(1985=100)



Note 1: Tohoku ... Aomori, Iwate, Miyagi, Akita, Yamagata, Fukushima, Niigata  
 Kanto ... Ibaraki, Tochigi, Gunma, Saitama, Chiba, Tokyo, Kanagawa, Yamanashi, Nagano  
 Chubu ... Toyama, Ishikawa, Fukui, Gifu, Shizuoka, Aichi, Mie  
 Kyushu includes Okinawa

Note 2: Compared by real value (The base year is 2011)

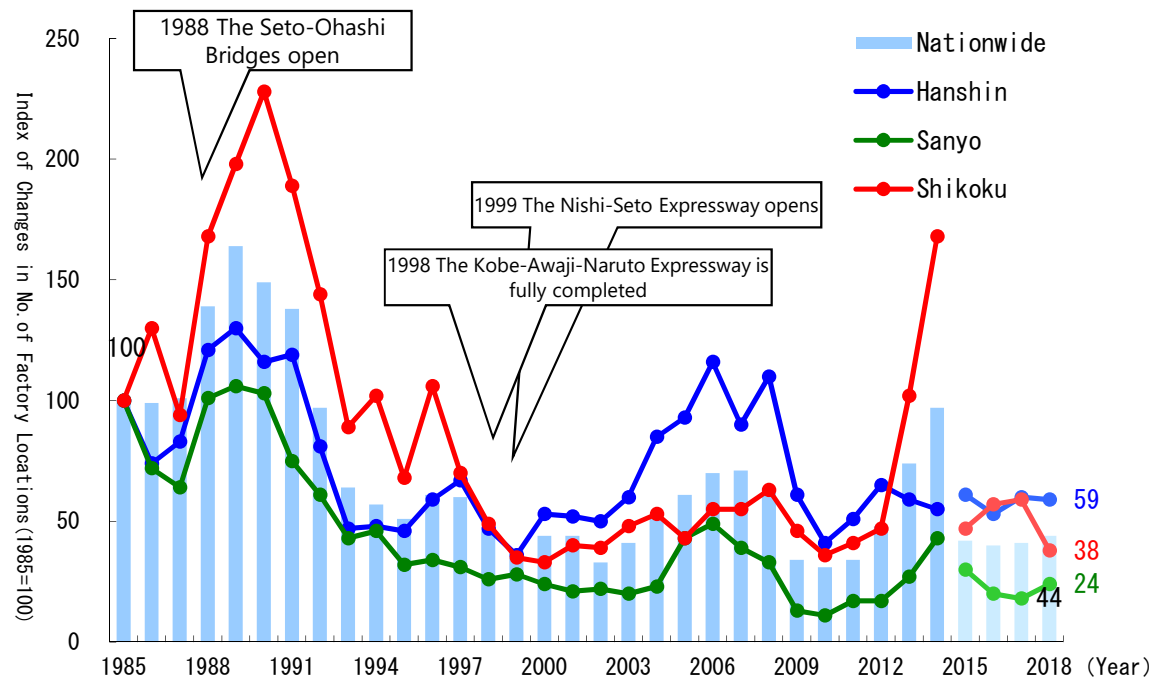
Source: Created from Annual Report on Prefectural Accounts (Cabinet Office)



# Impact on regional industry

- The number of new factory locations in the Shikoku area grew significantly before and after the opening of the Seto-Ohashi Bridges in 1988.
- In recent years, the area has remained at a higher level than elsewhere in the nation.

## ■ Trends in the number of new factory locations



Source: Created from Survey of Factory Location Trends (Ministry of Economy, Trade and Industry)

Note 1: Hanshin: Osaka & Hyogo      Sanyo: Okayama & Hiroshima

Note 2: Starting from fiscal year 2015, solar power generation facilities within the electrical power industry were excluded from this survey.

# Sacred ground for cyclists: Shimanami Expressway

- Shimanami Expressway is selected as one of the 7 best bicycle routes in the world on CNN TV, attracts attention overseas.
- The bicycle rental number increased about threefold in 10 years, with increasing use by non-Japanese cyclists.

## ■ Shimanami Expressway Cycling Routes (Bicycle terminal location map)

**The Shimanami Expressway links island areas, contributing to the formation of a cycling route**

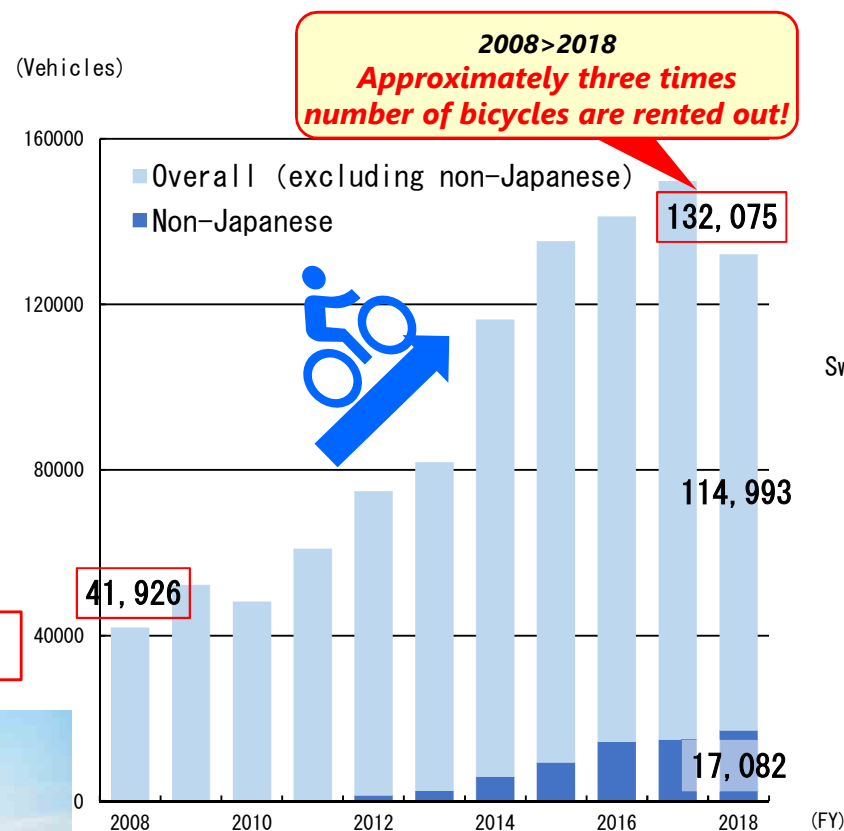


● Rental Bicycle Terminals  
(13 locations)



\* As of March 2017

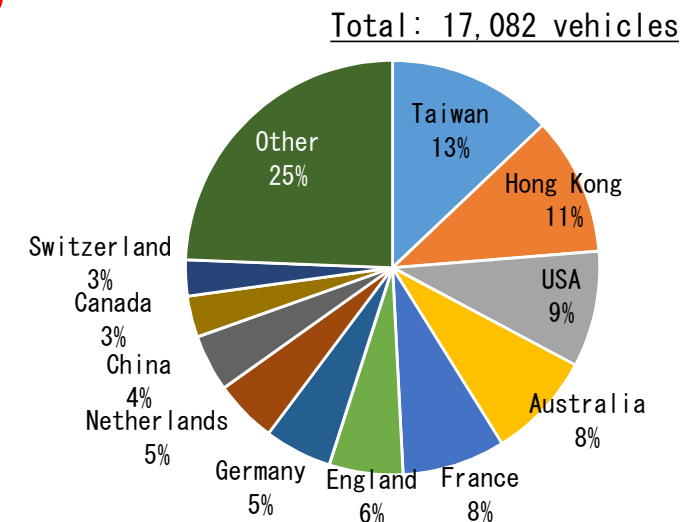
## ■ Changes in bicycle rental numbers



Note: Total No. of non-Japanese cyclists since FY 2012  
Source: Created from data provided by the cities of Imabari in Ehime Prefecture and Onomichi in Hiroshima Prefecture

## ■ Bicycle rental usage by non-Japanese cyclists

(FY 2018)



**Cycling on the Shimanami Expressway is also popular with non-Japanese cyclists!**