

「今後の物流施策の展開を考える」

2021年6月、新しい総合物流施策大綱が閣議決定された。1997年に最初の総合物流施策大綱が制定され、その後4年ごとに見直され、今回は第7次となる。施策大綱が誕生してから四半世紀が経過するなか、物流を取り巻く環境は大きく変化し、物流が果たすべき役割も変わってきたといえる。1990年代後半においては、物流におけるコストを含めて国際的に遜色ない水準のサービスの実現が最重要課題となっていた。そして、政府として物流に関する総合的な取り組みを強化することが重要であり、関係省庁が連携して物流施策の総合的な推進を図るために、最初の大綱が策定されることとなった。その後、国民生活を支える物流、環境にやさしい物流、さらに東日本大震災といった大規模災害時への対応、ドライバー不足など物流危機への対応、労働環境改善への対応、新型コロナウイルス感染拡大への対応など、様々な新たな課題が発生し、それへの対応が示されてきた。

新しい総合物流施策大綱では、簡素で滑らかな物流の実現、担い手にやさしい物流の実現、強くてしなやかな物流の実現の3点が大きな柱となっている。物流においても新技術の導入が進展しており、DXへの対応という視点、ドライバー不足が深刻化するなか、物流従事者の労働環境の改善、環境問題、災害時の対応など、その内容は多岐にわたっている。

総合物流施策大綱は、当初は物流に関わる政府による物流政策をまとめるというものであったが、最近では、物流政策に限らず、物流、サプライチェーン全体の今後の方向性を示すものとなっている。

本号では、物流が今後取り組むべき施策、そしてその課題を中心に、様々な視点から論じるものである。

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Thoughts on Developing a Logistics Policy for the Future

In June 2021, the Japanese Cabinet approved a new Comprehensive Physical Distribution Policy. The government adopted its first such policy for logistics and distribution in 1997, and revisions have been made to the policy every four years. The most recent policy marks the seventh time that revised policies have been issued. A quarter-century has elapsed since the first policy was introduced, and conditions in the logistics sector have changed dramatically over that period of time, as has the role that logistics activities play in the overall economy.

In the late 1990s, the most important issue for logistics providers was the need to minimize cost while still providing a world-class standard of service. It was against this backdrop that the government and its various Ministries began working together to develop a comprehensive policy aimed at developing the logistics sector. Since then, a multitude of changes have occurred in the industry and new challenges have arisen, requiring changes to this policy. The logistics sector has been forced to evolve in order to better support the lifestyles of Japanese citizens, reduce the impact on the environment, respond to natural disasters such as the Great Eastern Japan Earthquake, and address new challenges such as a growing shortage of delivery truck drivers, adverse working conditions for drivers and the impact of the Coronavirus pandemic. The government's new policy seeks to address all of these challenges.

The government's new Comprehensive Physical Distribution Policy aims to leverage advances in technology in order to promote logistics activities which are: "simple and smooth", "less onerous for logistics providers" and "tough yet flexible". Specifically, the policy promotes new business models that increase standardization and digitalization, improve working conditions in the sector in order to address the ongoing shortage of drivers, respond to environmental concerns and deal with the potential interruptions caused by natural disasters.

In the past, government policies for the logistics sector addressed logistics activities in isolation. More recently, however, it has been necessary to develop policies that address not only logistics activities, but a wide range of issues related to supply chain and the future direction of the logistics industry. The Comprehensive Physical Distribution Policy deals with these matters. In this report, we will look at issues that the industry will need to address in the future, examining these problems from every point of view.

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