

A nighttime city street scene with light trails from cars and illuminated skyscrapers. The image is used as a background for the report cover.

JAMA

JAPAN AUTOMOBILE MANUFACTURERS ASSOCIATION, INC.

DRIVING AMERICA'S AUTOMOTIVE FUTURE

Annual Contributions Report
2016-2017

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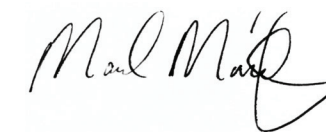
For more than ten years I've focused my career on U.S.-Japan relations, but it wasn't until I joined JAMA in 2013 that I fully grasped the impact Japanese-brand automakers have here in the United States. Since that time, I've seen firsthand our member companies' commitment to America, and it is clear that their contributions, economic and beyond, are stronger than ever. Between 2011 and 2015, JAMA member companies increased automobile production in America from 2.4 million to 3.9 million units. In that four-year span, the number of jobs generated by Japanese-brand automakers in the U.S. grew by over 17 percent, surpassing overall U.S. employment trends, which comparatively grew by only 7.5 percent in the same period. Our data shows that by 2015, Japanese automakers supported a record 1.5 million American jobs through manufacturing, R&D/design, headquarters, sales, supplier, logistics, and spin-off employment. Additionally, JAMA members exported 417,699 cars and trucks from the U.S. in 2015 and purchased a record-high \$67.9 billion in American-made auto parts.

Beyond these statistics, JAMA members are contributing to America in ways that are difficult to quantify because they enhance the lives and livelihoods of their employees in a qualitative manner. I have visited various member company facilities and I always find it impressive to witness the extent to which our members provide professional development and training opportunities for their employees. Likewise, it is inspiring to see how they empower their workers by providing opportunities for the employees themselves to suggest improvements to the manufacturing process, boosting efficiency and productivity while reducing waste and energy consumption.

By implementing workforce development programs, STEM education initiatives, and environmental stewardship efforts, JAMA members also demonstrate their support for the local communities in which they operate as well as their efforts to mobilize American talent and ingenuity. These activities prove that Japanese-brand automakers are helping to prepare America's workforce for an increasingly competitive and technologically evolving industry while ensuring that they pursue manufacturing advancements in an environmentally sustainable way. And through their leading edge research and development of high-tech, energy-efficient, and environmentally-friendly automotive technologies, it is clear that Japanese-brand automakers are driving the automotive future in America. The fact that 77 percent of alternative-powered vehicles on U.S. roads are Japanese-brand autos is testament to this understanding.

The automobile industry in America is changing rapidly, and Japanese-brand automakers are helping to shape the path forward. With an eye towards the future, JAMA members are at the forefront of emerging technologies, including the development of autonomous vehicle technology, advanced infotainment systems, and vehicle-to-vehicle communication.

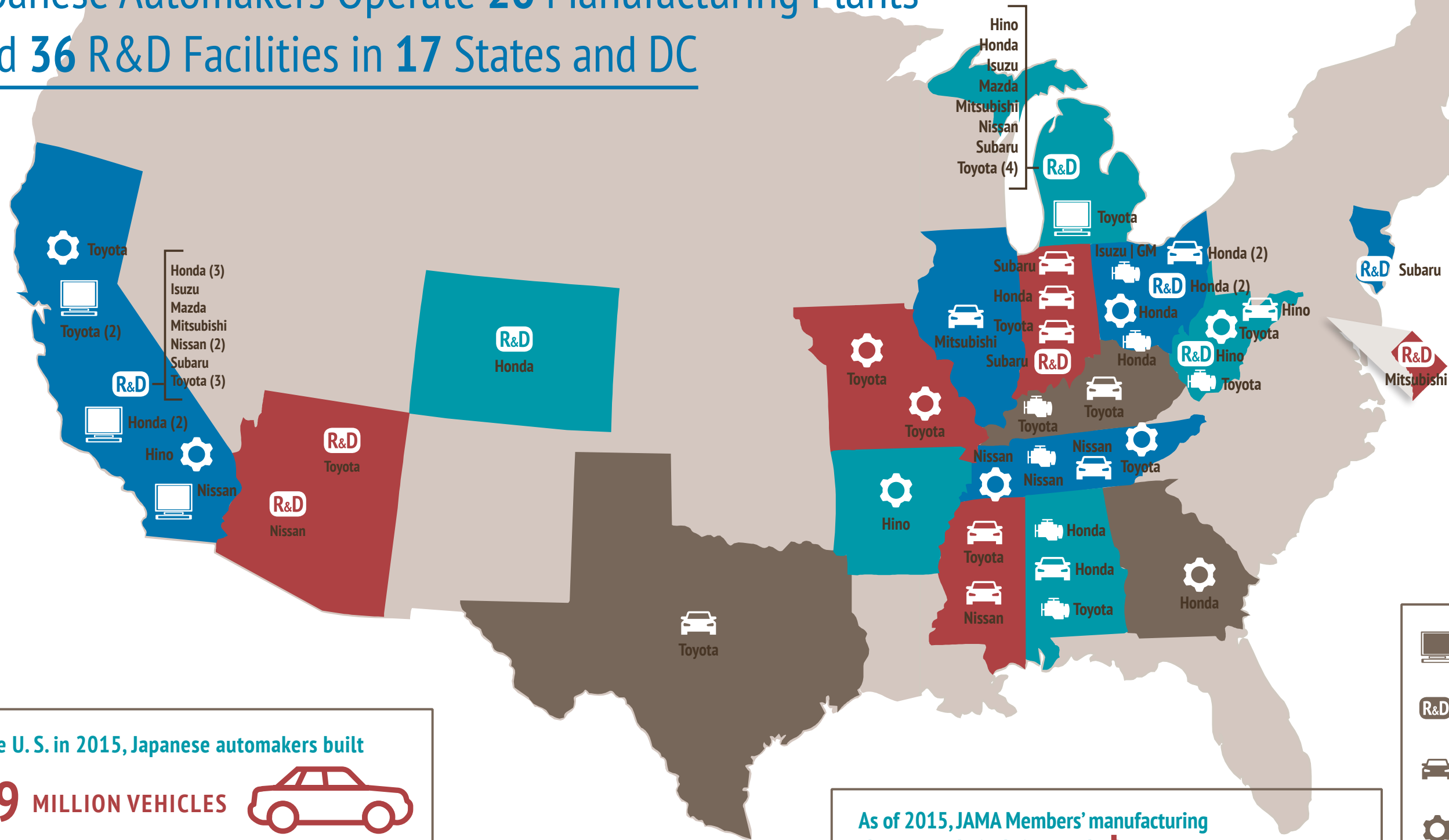
This annual report is our endeavor to share with you examples of the forward-looking approach to building autos in America that our members conduct as standard practice. All this may be normal to folks across the country who live with this reality day-by-day, but to me and my staff at JAMA's U.S. office, it is nothing short of remarkable.



Manny Manriquez
General Director
JAMA USA



Japanese Automakers Operate 26 Manufacturing Plants and 36 R&D Facilities in 17 States and DC

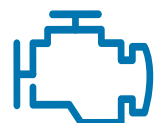


In the U.S. in 2015, Japanese automakers built

3.9 MILLION VEHICLES

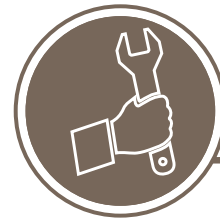


and **4.6** MILLION ENGINES



As of 2015, JAMA Members' manufacturing plants cumulatively invested **\$45.4 BILLION** in the U.S. Economy

- DESIGN CENTER
- R&D CENTER
- VEHICLE MFG. PLANT
- PARTS MFG. PLANT
- ENGINE MFG. PLANT



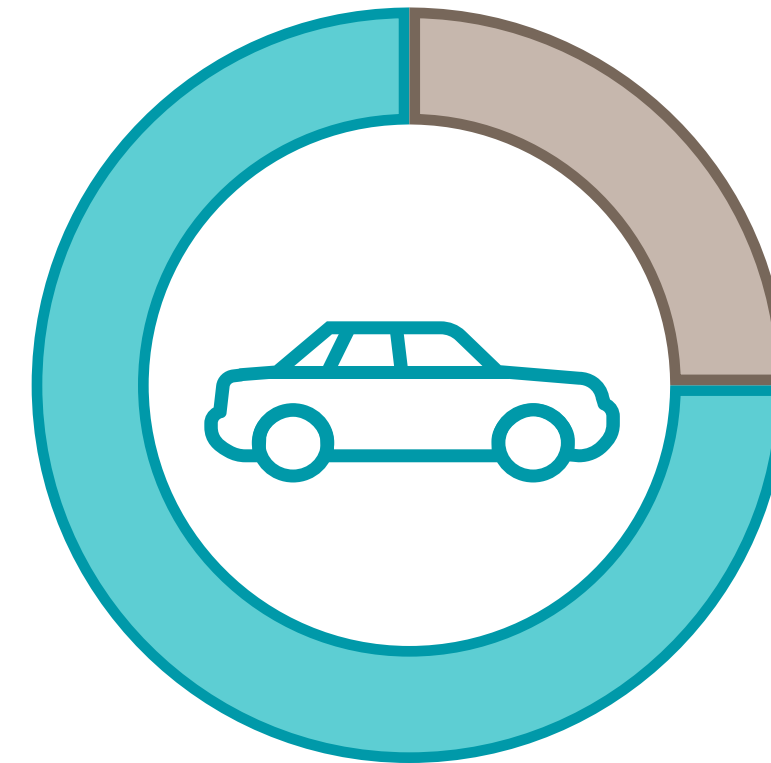
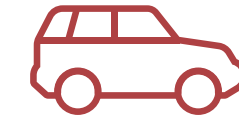
87,788 DIRECT EMPLOYEES

375,143 NEW VEHICLE DEALERS' EMPLOYEES



1,043,000 INTERMEDIATE & SPIN-OFF

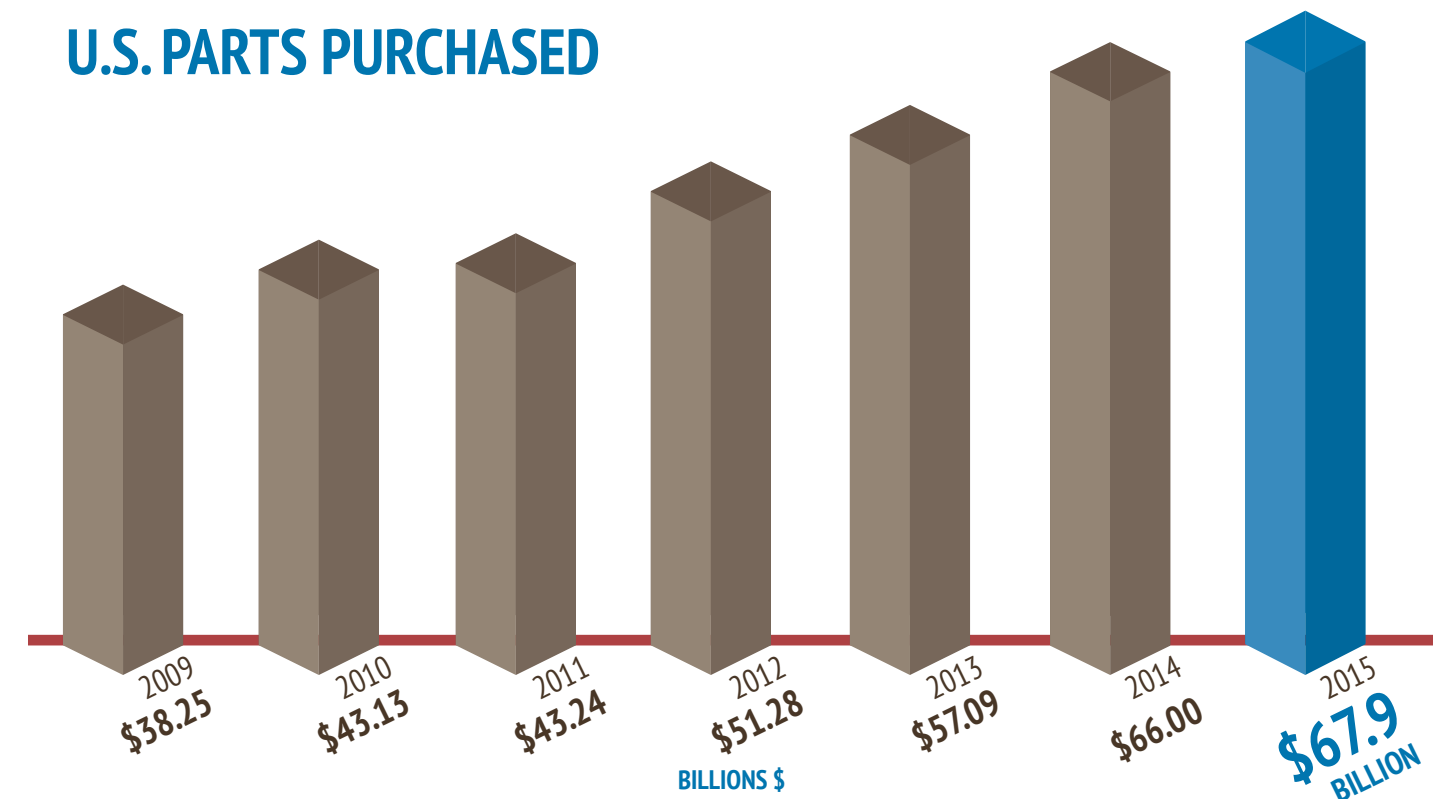
1,505,931 TOTAL AMERICAN JOBS



75%
of Japanese-Brand
Vehicles Sold in the
U.S. are Built in
North America

EMPLOYMENT 2015	AUTOMAKERS	NEW VEHICLE DEALERS	TOTAL
Manufacturing	60,640		
R&D/Design	5,086		
Headquarters, Sales & Others	22,062		
Subtotal	87,788	375,143	462,931
Suppliers	231,000	122,000	353,000
Spin-Off	409,000	281,000	690,000
Grand Total	727,788	778,143	1,505,931

U.S. PARTS PURCHASED





Accord

HONDA

Accord Coupe | Accord Sedan | Accord Hybrid
Civic Sedan | Crosstour | CR-V | Odyssey
Acura (ILX, MDX, RDX, TLX)



Altima

NISSAN

Altima | LEAF | Maxima | Rogue | Pathfinder
Frontier | Armada | Titan | NV Cargo
NV Passenger | Murano | Infiniti QX60



Outback

SUBARU

Legacy | Outback



Tacoma

TOYOTA

Avalon | Camry | Corolla | Highlander | Sequoia
Sienna | Tacoma | Tundra | Venza



417,699

Cars & Trucks Exported
from Japanese Auto Plants
in the U.S. in 2015

More than 77 percent of alternative-powered vehicles on U.S. roads are Japanese-brand autos.

Hybrid-Diesel-195h Truck

HINO | Designed from the ground-up in the U.S. this diesel electric hybrid truck is a huge step forward for commercial vehicles and represents the most viable hybrid engine truck available.



Fuel Cell-CLARITY FUEL CELL

HONDA | Due to be released in the U.S. in late 2016 the Honda CLARITY FUEL CELL will help acquaint a new generation of drivers to the benefits of a hydrogen fuel cell vehicle. One of three vehicles in the new Clarity alternative fuel vehicle line-up, the CLARITY FUEL CELL is just one way Honda dedicates itself to protecting the environment.



High-Efficiency-CX 9

MAZDA | The Mazda CX-9, which incorporates SKYACTIV technologies, features Mazda's new SKYACTIV-G 2.5T engine and super-efficient transmission, and improves its fuel efficiency by 32 percent with no penalty to performance.



Hybrid-Outlander PHEV

MITSUBISHI | Due to be released in the U.S. in 2017 the Outlander PHEV represents 50 years of "electromobility" and decades of four-wheel drive technology. The Outlander PHEV features a highly efficient 2.0-liter gas engine and two high-performance electric motors, and Mitsubishi's superior Super All-Wheel Control (S-AWC) system, the Mitsubishi Outlander PHEV is a very eco-friendly and capable PHEV.



Electric-LEAF

NISSAN | Nissan first introduced the LEAF in 2010 and the 2016 model boasts an EPA-estimated 110 mile range powered by its new 30kwh battery. Nissan continues to prove the benefits of fuel efficiency through electrification.



PZEV-XV Crosstrek Hybrid

SUBARU | With the XV Crosstrek Hybrid, Subaru continues to combine a rugged spirit with outstanding fuel efficiency. This vehicle utilizes AWD in an advanced technology Partial Zero Emissions engine to give a unique balance between performance and efficiency.



Fuel Cell-Mirai

TOYOTA | Available now in California, the Mirai fuel cell vehicle has an EPA estimated range of 312 miles with water as its only by-product. The Mirai represents Toyota's dedication to innovation, safety, and the environment.



Hybrid-Prius

TOYOTA | The original hybrid vehicle, the Prius represents 16 years of efficiency. The new 2016 Prius has an estimated range of 52 combined mpg, features a newly styled body designed for improved aerodynamics, and a new rear suspension for additional cargo space and functionality.



Each year Japanese automakers and their employees donate time, energy, and money for the betterment of communities across America.

HINO

One way Hino supports the community is by bringing the spirit of Christmas to local families. This year Hino employees at the Farmington Hills R&D facility donated gifts to those families who could not afford to purchase gifts for their own children.



MITSUBISHI

In 2015, Mitsubishi sponsored the 29th annual Multiple Sclerosis (MS) dinner auction in San Diego, California.

The event raised over \$500,000 for MS research. Additionally, Mitsubishi employees have donated their time and resources to gather food and other supplies for local homeless shelters.



NISSAN

In 2015, Nissan announced a donation of \$250,000 to local Historically Black Colleges and Universities (HBCUs). This donation will be used to promote STEM education initiatives at each school and to develop top tier talent for America's next generation of innovators.



HONDA

For the first time in its history, associates at Honda North America joined forces with Honda dealers and suppliers to conduct the first ever National Week of Service, from June 10 to June 19, 2016. The Week of Service called nearly 15,000 Honda volunteers to action, along with additional volunteers from the more than 325 dealerships and 76 suppliers to support volunteer projects in the U.S., Canada, and Mexico.

MAZDA

The Mazda Drive for Good winter event, from November 23, 2015 through January 4, 2016, in its third year of fundraising donated \$150 to various charities for every new Mazda sold or leased as a joint funding initiative with dealers. It is donating more than \$5.3 million to select charities as a result of its Mazda Drive for Good event. In addition, Mazda employees and dealers across the nation also will donate more than 72,000 charitable service hours in 2016 through various local volunteer opportunities, by pledging one hour of charitable service for every test drive of a new Mazda.



SUBARU

Subaru Indiana routinely opens its grounds to host 5K walks and other fundraising events, including for breast cancer awareness. Subaru of America (SOA) also cares deeply about the environment and often donates vehicles to help ecological and education efforts as they did in 2016 with the Penn State University environmental center at Shavers Creek in Petersburg, PA (pictured).



TOYOTA

In 2016, Toyota celebrates the 25th anniversary of its Family Learning Program. In partnership with the National Center for Family Learning, Toyota is dedicated to finding multi-generational solutions to the educational challenges faced by low income and ethnically diverse families.





Japanese automakers demonstrate that they care deeply about their employees and the communities in which they are located by empowering their team members to learn and develop new skills. They also partner with local communities to support STEM education initiatives beyond the plants.

HONDA

Honda cares deeply about its workers, over the past three years Honda Manufacturing of Alabama has invested over \$510 million and added 450 jobs in efforts to enhance manufacturing flexibility and worker productivity. The case is the same in Indiana where Honda recently unveiled the new Associate Resources Center (ARC), a career development facility designed to promote the advancement of Honda associates' manufacturing skills.



NISSAN

In December of 2014, Nissan announced a partnership with the state of Tennessee to train manufacturing workers for its Tennessee auto plants and its many suppliers in the region. Nissan is building a state-of-the-art training center next to its Smyrna plant, which will provide critical opportunities for current and prospective employees to learn valuable skills in advanced manufacturing.



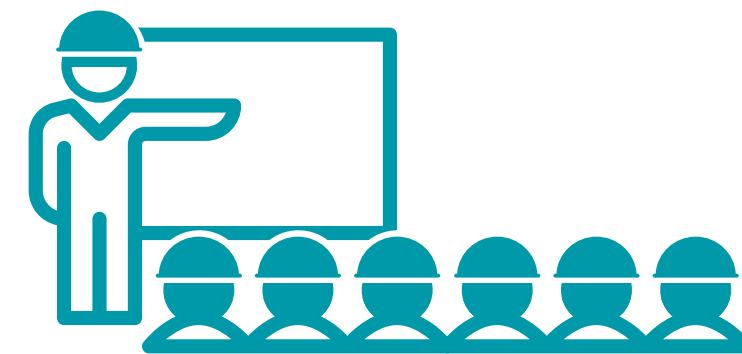
SUBARU

Subaru of Indiana Automotive, Inc. (SIA) is proud to offer the SIA AIM program. This puts the most promising college students on the fast track to the career of their dreams by providing highly-specialized education in Computer Integrated Manufacturing, along with real-world experience and compensation. Freshmen studying computer-integrated manufacturing can take classes on campus during their first semester and apply for the SIA AIM program. If selected, these students spend the second semester working and taking classes at SIA, and if successful will qualify for employment with SIA and receive additional scholarships to continue their education.



TOYOTA

With the building of the first American-made Lexus at its state of the art Georgetown, Kentucky facility, Toyota worked tirelessly to train employees in its Takumi training philosophy. This philosophy embraces becoming a master of one's craft and role, no matter how large or small. All told, over 1.5 million combined training hours were invested in the process before the first Lexus came off the assembly line.





Given the vast differences between Japanese and American vehicle markets, many of the products that JAMA members sell in the U.S. are designed and built in America. JAMA members' R&D centers are responsible for tracking consumer trends and developing products that satisfy American preferences and needs.

NAME OF COMPANY	R&D, DESIGN, AND TEST CENTERS	CURRENT FUNCTIONS
Hino Motors Manufacturing U.S.A., Inc.	Farmington Hills, MI; Williamstown, WV	1,5,6,7,8
Honda R&D Americas, Inc.	Torrance, Los Angeles & Mountain View, CA; Raymond & Columbus, OH; Detroit, MI; Denver, CO	1,2,3,4,5,6,7,8
Isuzu Technical Center of America, Inc.	Plymouth, MI; Garden Grove, CA	1,2,3,5,6,7,8
Mazda North American Operations, Inc.	Irvine, CA; Wixom, MI	1,2,3,4,5,6,7,8
Mitsubishi Motors R&D of America, Inc.	Ann Arbor, MI; Cypress, CA; Washington, DC	2,3,8
Nissan Technical Center North America	Farmington Hills, MI; West Sacramento & Sunnyvale, CA; Stanfield, AZ	1,2,3,5,6,7,8
Nissan Design America	San Diego, CA	4
Subaru Research and Development, Inc.	Cypress, CA; Lafayette, IN; Ann Arbor, MI; Cherry Hill, NJ	1,2,3,4,6,8
Toyota Technical Center	Ann Arbor, Livonia, Plymouth, & Saline, MI; Gardena, Sacramento & Silicon Valley, CA; Wittmann, AZ	1,2,3,5,6,7
Caltly Design Research, Inc. (Toyota)	Newport Beach & San Francisco (Toyota Innovation Hub), CA; Ann Arbor, MI	4,6

KEY TO CURRENT FUNCTIONS

- | | |
|--|---|
| 1. Technical support for procurement of parts for local production | 5. Parts design |
| 2. Evaluation of parts | 6. Vehicle design |
| 3. Evaluation of vehicles | 7. Prototype production |
| 4. Styling & general design | 8. Technical support & marketing research |

JAPANESE AUTOMAKERS' PRODUCTION, EMPLOYMENT, & INVESTMENT IN THE U.S.

	NAME OF COMPANY	LOCATION	PRODUCTS	UNITS PRODUCED IN 2015	PRODUCTION CAPACITY	EMPLOYEES	TOTAL INVESTMENT (\$ MILLION)
HINO	Hino Motors Manufacturing U.S.A., Inc.	Ontario, CA	Vehicle components for Toyota vehicles	197,308	200,000	174	62
		Marion, AR	Differential, Rear Axle & Suspension Related Parts for Toyota vehicles	126,262	156,000	600	275
		Williamstown, WV	Class 6-7 Commercial Vehicles	10,438	12,000	298	65
HONDA	Honda of America Manufacturing, Inc.	Marysville, East Liberty & Anna, OH	Accord Coupe, Accord Sedan, CR-V, Acura ILX, Acura TLX, Acura RDX	701,819	680,000 -Marysville 440,000 -East Liberty 240,000	9,100 Marysville, East Liberty & Anna Total	6,200 -Marysville 4,700 -East Liberty 1,500
			Engines	1,080,230	1,180,000		2,400
	Honda Transmission Mfg. of America, Inc.	Russels Point, OH	Automatic Transmissions	895,248	1,000,000	1,150	770
			Gear Sets	807,482	970,000		
			4WD Systems	124,498	160,000		
			4WD Transfer Cases	157,773	200,000		
	Honda Manufacturing of Alabama, LLC	Lincoln, AL	Odyssey, Pilot, Acura MDX	349,703	340,000	4,500	2,400
Engines			349,895	340,000			
Honda Precision Parts of Georgia, LLC	Tallapoosa, GA	Automatic Transmissions	268,768	375,000	475	340	
Honda Manufacturing of Indiana, LLC	Greensburg, IN	Civic Sedan	218,202	250,000	2,150	800	
ISUZU	DMAX, Ltd.	Moraine, OH (Joint Venture: GM)	Diesel Engines	125,594	200,000	554	623
MITSUBISHI	Mitsubishi Motors North America, Inc.	Normal, IL	Outlander Sport	50,149	70,000	210	1,805
NISSAN	Nissan Smyrna Vehicle Assembly Plant and Battery Plant	Smyrna, TN	Altima, Leaf, Maxima, Pathfinder, Rogue, Infiniti QX60	633,000	640,000	8,400	6,300
			Lithium-Ion Batteries	n/a	n/a		
	Nissan Decherd Powertrain Plant	Decherd, TN	Engines	964,099	1,400,000	1,600	1,100
	Infiniti Decherd Powertrain Plant	Decherd, TN	Engines	125,717	250,000	300	241
Nissan Canton Vehicle Assembly Plant	Canton, MS	Altima, Armada, Frontier, Murano, NV Passenger, NV Cargo, Titan	330,000	450,000	6,400	3,200	
SUBARU	Subaru of Indiana Automotive, Inc.	Lafayette, IN	Legacy, Outback, & Toyota Camry	308,692	310,000	4,229	1,791
TOYOTA	TABC Inc. (TABC)	Long Beach, CA	Sub-assemblies	2,471,515	4,600,000	300	300
			Stamping parts	3,238,523	24,000,000		
			Steering columns	124,668	210,000		
			Front arms	683,686	1,000,000		
	Toyota Motor Manufacturing Kentucky, Inc. (TMMK)	Georgetown, KY	Camry, Camry Hybrid, Avalon, Avalon Hybrid, Venza & Lexus ES350	457,668	550,000	7,700	6,200
			Engines	608,894	600,000		
	Bodine Aluminum, Inc. (BODINE)	St. Louis & Troy, MO Jackson, TN	Engine brackets	555,285	n/a	1,100	650
			Cylinder heads	2,474,604	n/a		
			Cylinder blocks	1,859,528	n/a		
			Transmission Case & Housing	1,299,388	n/a		
	Toyota Motor Manufacturing West Virginia, Inc. (TMMWV)	Buffalo, WV	Engines	693,178	639,000	1,100	1,200
			Transmissions	734,992	740,000		
	Toyota Motor Manufacturing Indiana, Inc. (TMMI)	Princeton, IN	Sienna, Highlander, Highlander HV, & Sequoia	375,647	365,000	5,100	4,300
Toyota Motor Manufacturing Alabama, Inc. (TMMAL)	Huntsville, AL	Engines	631,630	700,000	1,100	864	
Toyota Motor Manufacturing Texas, Inc. (TMMTX)	San Antonio, TX	Tundra, Tacoma	232,910	200,000	2,600	2,600	
Toyota Motor Manufacturing Mississippi, Inc. (TMMMS)	Blue Springs, MS	Corolla	190,514	170,000	1,500	961	
TOTAL			VEHICLES 2015	3,858,742	3,357,000	60,640	45,447
			ENGINES 2015	4,579,237	5,309,000		



NISSAN MOTOR CORPORATION



JAMA

JAPAN AUTOMOBILE MANUFACTURERS ASSOCIATION, INC.



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