

✕ THE MOTOR INDUSTRY ✕
OF JAPAN

2018

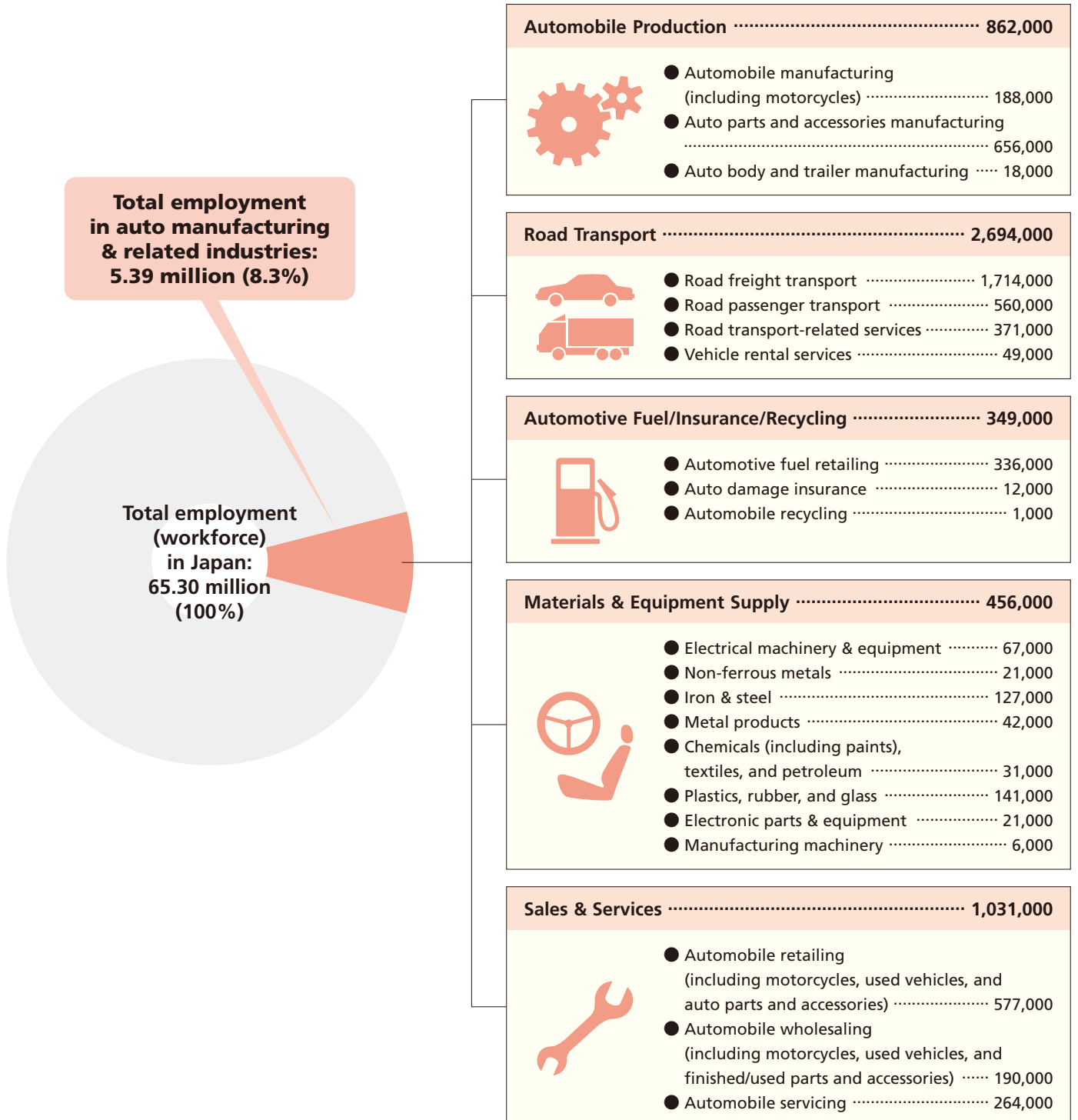
JAPAN AUTOMOBILE MANUFACTURERS ASSOCIATION, INC.

A Vast Range of Related Industries

Automobiles are the focus of an extremely wide range of industrial and related activity, from materials supply and vehicle production to sales, servicing, freight shipping and other auto-centered operations. Auto-related employment in Japan at present totals 5.39 million people.

● EMPLOYMENT IN THE AUTOMOBILE MANUFACTURING AND RELATED INDUSTRIES

Number of employees



Note: Figures are rounded off to the nearest thousand.

Automobile Manufacturing Is an Integrated Industry

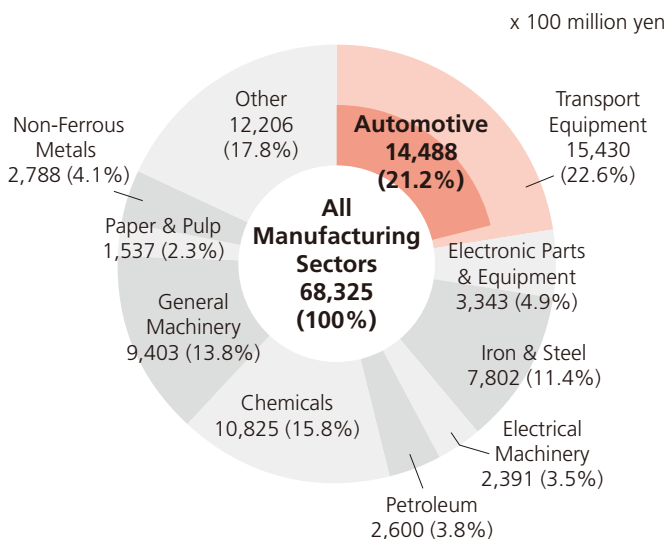
An automobile typically is composed of 20,000 to 30,000 parts, all of which even the largest vehicle manufacturers cannot produce themselves. Automakers therefore either outsource production or purchase finished products (such as tires, batteries, air conditioners and audio systems). Finished products purchased by the automakers include products manufactured abroad, and the volume of imported components increases yearly. Automobile manufacturing is thus an integrated industry because it relies on many supporting industries to produce the great diversity of materials and components it uses. Trends in the automobile industry, which makes huge investments in equipment and research activities, are considered a barometer of the economy.

PRINCIPAL MATERIALS AND COMPONENTS USED IN AUTOMOBILE MANUFACTURING

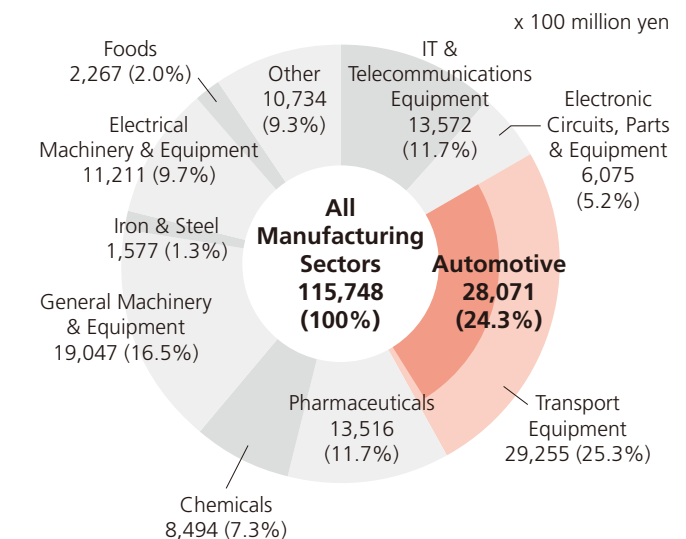
Cast iron	Engine parts, e.g. cylinder blocks
Common steel	Chassis, frames, wheel parts
Special steel	Gears, axle shafts, crankshafts, fuel injection equipment
Copper	Electricals, radiators, cables
Lead, tin, zinc	Engine metals, solder, body varnish, batteries
Aluminum	Engine parts (e.g. pistons, cylinder heads), wheels, chassis
Noble metals	Emissions aftertreatment parts
Other non-ferrous metals	Magnets, plating
Synthetic resin	Steering wheels, bumpers, radiator grilles, body components
Glass	Window glass, mirrors, headlamps
Rubber	Tires, sealing parts, vibration control parts
Ceramics	Plugs, electronic parts, sensors, emissions aftertreatment parts
Textiles	Seats, linings, seatbelts
Leather	Seats, packing
Paper	Filters
Wood	Load-carrying platforms, interior equipment
Paints	Ornamental and rustproof paints
Chemicals	Antifreeze, engine oil, transmission oil, brake oil
Animal and vegetable oils	For casting
Fats and oils	For lubrication, heat treatment, etc.

Springs, dampers	
Turbochargers	
Bearings	
Machined parts, e.g. pumps	
Tires and tubes	
Batteries	
Window glass	
Onboard tools, e.g. jacks	
Supplies, e.g. extinguishers, tire chains	
Electronic parts	Sensors, ECUs, actuators
Lights, cables, optical fibers	
Air conditioners, air cleaners	
Starters, alternators, generators, inverters, meters	
Audio systems, phones, navigation systems	
Safety equipment, e.g. anti-lock brakes, airbags, traction control	
Coke	For casting
Petroleum, electricity, natural gas	Fuel, heat treatment, paint drying, power generation

INVESTMENTS IN EQUIPMENT OF MAJOR MANUFACTURING SECTORS (PROJECTED, FY 2017)



RESEARCH EXPENDITURES OF MAJOR MANUFACTURING SECTORS (FY 2016)



Note: Japan's fiscal year (FY) starts on April 1 and ends on March 31 of the following year.
Source: Survey on Planned Capital Spending, Development Bank of Japan

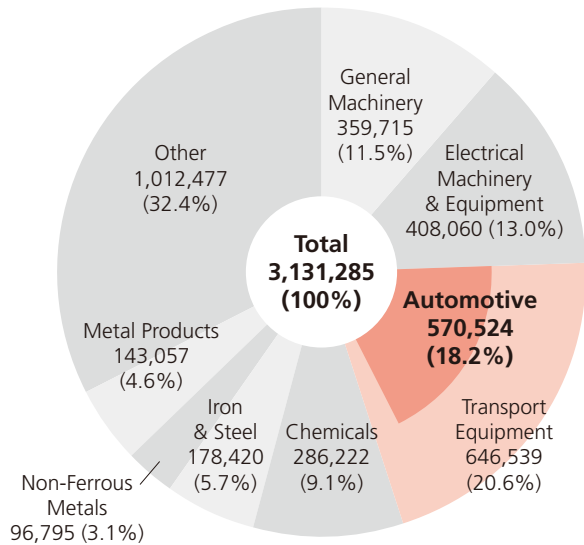
Source: Survey on Research Activities in Science and Technology, Ministry of Internal Affairs and Communications

Automobile Manufacturing Is a Core Industry

The automotive industry is one of the Japanese economy's core industrial sectors. In 2015 automotive shipments accounted for 18.2% of the total value of Japan's manufacturing shipments, and 40.3% of the value of the machinery industries' combined shipments. Automotive shipments (both domestic and export shipments, including motorcycles, auto parts, etc.) in value terms totalled 57.5 trillion yen in 2015, up 7.0% from the previous year.

SHIPMENTS OF MAJOR MANUFACTURING SECTORS IN VALUE TERMS (2015)

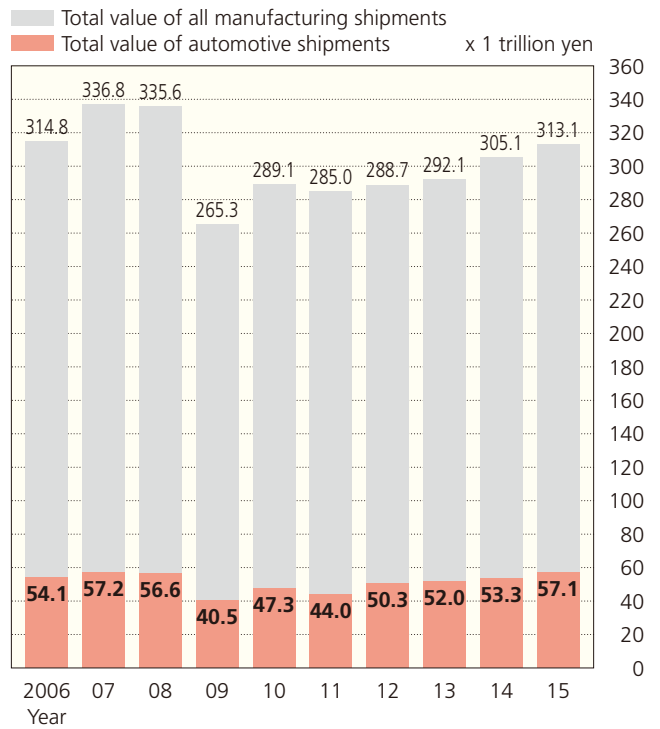
x 100 million yen



Breakdown of automotive shipments:

- Automobiles (including motorcycles) 228,674
- Auto bodies and trailers 6,172
- Automotive parts and accessories 335,678

COMPARISON OF VALUE OF AUTOMOTIVE SHIPMENTS TO TOTAL VALUE OF ALL MANUFACTURING SHIPMENTS



SHIPMENTS OF MAJOR MANUFACTURING SECTORS IN VALUE TERMS

x 100 million yen

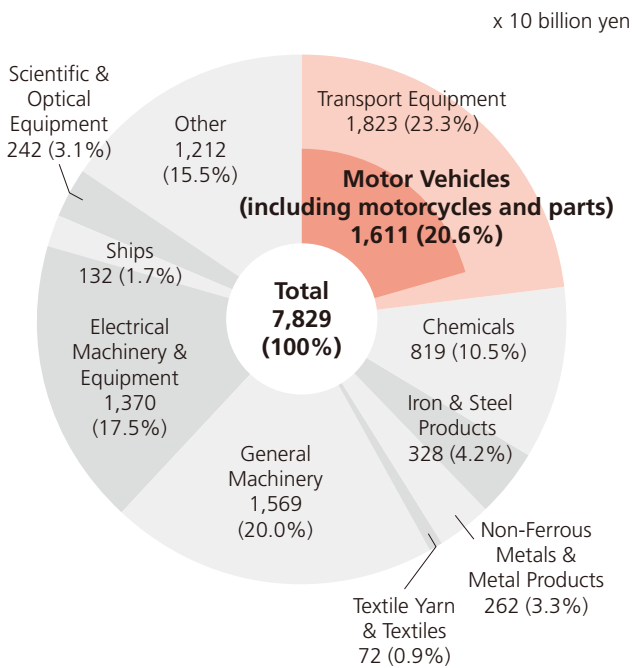
Year	Chemicals	Iron & Steel	Non-Ferrous Metals	Metal Products	Machinery Industries				Other	Total	Automotive Shipments		
					General Machinery	Electrical Machinery & Equipment	Transport Equipment	Subtotal			As % of Value of Machinery Shipments	As % of Total Value of Manufacturing Shipments	
													Automotive
1970	55,402	65,648	30,547	37,277	68,028	73,305	72,758	54,673	223,008	287,383	690,348	24.5	7.9
1975	104,381	113,063	39,087	65,731	106,112	108,213	147,935	105,241	379,551	589,807	1,274,329	27.7	8.3
1980	179,787	178,956	81,186	106,465	175,998	222,346	249,536	212,346	682,457	952,724	2,146,998	31.1	9.9
1985	205,524	177,543	63,836	130,944	241,904	408,422	361,793	276,927	1,055,932	1,063,240	2,653,206	26.2	10.4
1990	235,030	182,687	78,217	185,736	332,249	545,286	468,582	423,106	1,397,439	1,205,939	3,233,726	30.3	13.1
1995	233,625	140,727	64,964	176,465	298,844	548,309	442,145	395,613	1,330,364	1,155,277	3,060,356	29.7	12.9
2000	237,994	119,630	62,189	155,868	304,132	595,817	444,474	400,429	1,385,612	1,115,720	3,035,824	28.9	13.2
2005	250,271	168,964	67,116	140,159	312,108	495,083	539,999	489,548	1,385,037	988,717	2,962,417	35.3	16.5
2006	261,995	184,727	90,162	144,510	333,313	511,634	598,356	541,091	1,484,034	1,023,649	3,148,346	36.5	17.2
2007	282,939	211,917	107,705	151,889	362,734	553,265	639,100	571,848	1,597,840	1,058,017	3,367,566	35.8	17.0
2008	281,299	243,322	104,805	151,492	402,477	518,797	637,666	566,053	1,558,940	1,015,930	3,355,788	36.3	16.9
2009	242,757	159,884	69,400	124,267	289,320	400,593	471,866	404,915	1,161,779	894,503	2,652,590	34.9	15.3
2010	262,120	181,463	89,114	122,920	306,186	442,848	542,136	472,962	1,291,170	944,290	2,891,077	36.6	16.4
2011	263,512	186,656	90,225	121,277	322,495	403,789	505,870	439,592	1,232,154	955,863	2,849,688	35.7	15.4
2012	260,379	180,121	89,228	128,607	330,816	369,426	564,858	502,627	1,265,100	963,841	2,887,276	39.7	17.4
2013	274,092	179,053	88,059	130,606	320,911	368,283	582,032	519,710	1,271,226	977,885	2,920,921	40.9	17.8
2014	281,230	192,022	94,220	139,328	337,273	394,772	600,633	533,101	1,332,678	1,011,922	3,051,400	40.0	17.5
2015	286,222	178,420	96,795	143,057	359,715	408,060	646,539	570,524	1,414,314	1,012,477	3,131,285	40.3	18.2

Notes: 1. Shipments from all manufacturing operations with four or more employees are included in this data. 2. Compilation of data on production in value terms was discontinued in 1996 and replaced by data on shipments in value terms. 3. Figures in value terms include domestic consumption tax revenue from shipments. 4. "Electrical Machinery & Equipment" includes IT-related electronic parts and equipment as of 2002. 5. Because of the non-issuance of Japan's *Census of Manufactures* in 2015, the 2015 data in the above chart was obtained from an alternate source (see below). Sources for statistical data on this page: *Census of Manufactures, Economic Census, Ministry of Economy, Trade and Industry*

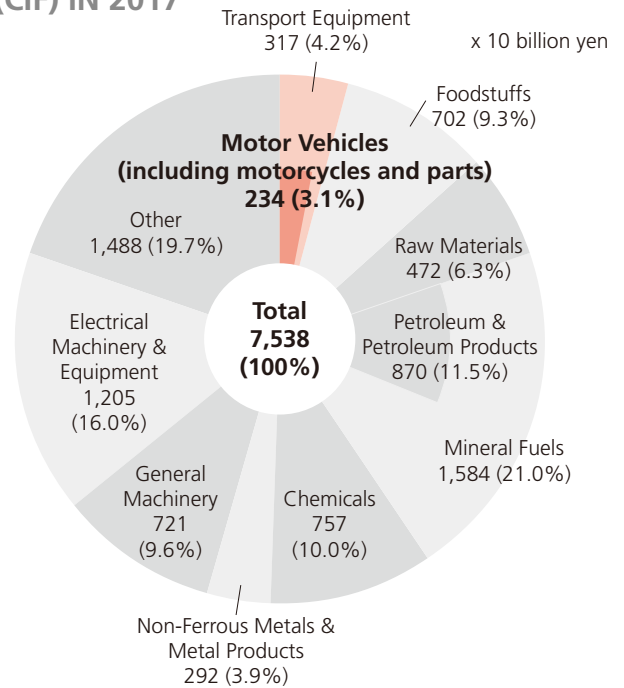
In Value Terms, Motor Vehicle Exports Total 16 Trillion Yen; Imports, 2 Trillion Yen

In 2017 Japan's gross exports and imports increased from the previous year, by 11.8% and 14.1% respectively. In value terms, automotive exports grew 6.6% from 2016 to 16.1 trillion yen, and automotive imports expanded 11.4% year-on-year to 2.3 trillion yen.

EXPORTS BY PRINCIPAL COMMODITY (FOB) IN 2017



IMPORTS BY PRINCIPAL COMMODITY (CIF) IN 2017



AUTOMOTIVE EXPORTS IN VALUE TERMS (FOB)

x 100 million yen

Year	Motor Vehicles			Exports Total			
	Value	Chg. (%)	Passenger Cars, Trucks, Buses	Auto Parts	Motorcycles & Motorcycle Parts	Value	Chg. (%)
2008	175,126	94.5	137,361	30,655	7,110	810,181	96.5
2009	93,679	53.5	66,933	23,089	3,657	541,706	66.9
2010	125,956	134.5	91,741	30,833	3,382	673,996	124.4
2011	115,417	91.6	82,042	29,972	3,403	655,465	97.3
2012	127,521	110.5	92,250	32,051	3,220	637,476	97.3
2013	142,411	111.7	104,125	34,762	3,524	697,742	109.5
2014	147,849	103.8	109,194	34,750	3,905	730,930	104.8
2015	158,912	107.5	120,463	34,830	3,619	756,139	103.4
2016	151,175	95.1	113,329	34,617	3,229	700,358	92.6
2017	161,092	106.6	118,254	38,966	3,872	782,865	111.8

AUTOMOTIVE IMPORTS IN VALUE TERMS (CIF)

x 100 million yen

Year	Motor Vehicles			Imports Total			
	Value	Chg. (%)	Passenger Cars, Trucks, Buses	Auto Parts	Motorcycles & Motorcycle Parts	Value	Chg. (%)
2008	15,138	91.6	7,499	6,662	978	789,548	108.0
2009	8,982	59.3	4,549	3,696	736	514,994	65.2
2010	11,518	128.2	5,958	4,879	682	607,650	118.0
2011	12,805	111.2	7,352	4,717	736	681,112	112.1
2012	15,506	121.1	9,082	5,549	875	706,886	103.8
2013	18,948	122.2	10,857	6,981	1,109	812,425	114.9
2014	20,925	110.4	11,623	8,148	1,154	859,091	105.7
2015	21,261	101.6	11,398	8,770	1,093	784,055	91.3
2016	21,023	98.9	11,781	8,329	913	660,420	84.2
2017	23,419	111.4	13,070	9,328	1,021	753,792	114.1

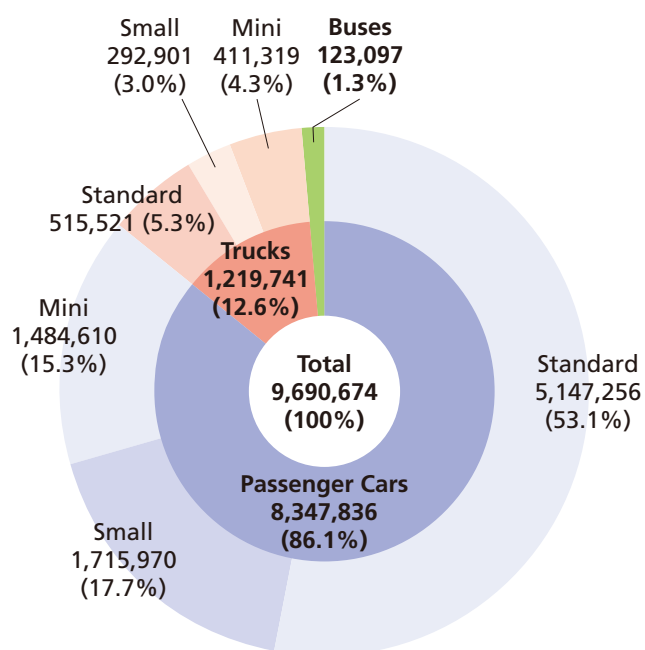
Notes: 1. "Passenger Cars, Trucks, Buses" includes chassis. 2. FOB: Free on board; CIF: Cost, insurance, and freight. 3. "Chg. (%)" means change from the previous year (with the previous year's result indexed at 100). Source for all statistical data on this page: The Summary Report on Trade of Japan, Japan Tariff Association

Motor Vehicle Production Expands for First Time in 3 Years

In 2017 motor vehicle production in Japan totalled 9.69 million units, up 5.3% from the previous year, showing the first increase in three years. Passenger car production rose 6.0% to a total of 8.35 million units. Within that category, standard cars grew 3.0% to 5.15 million units, small cars rose 6.5% to 1.72 million units, and minicars climbed 17.5% to 1.49 million units. Meanwhile, truck production increased 1.6% from 2016 to 1.22 million units, whereas bus production decreased 5.1% to 123,000 units.

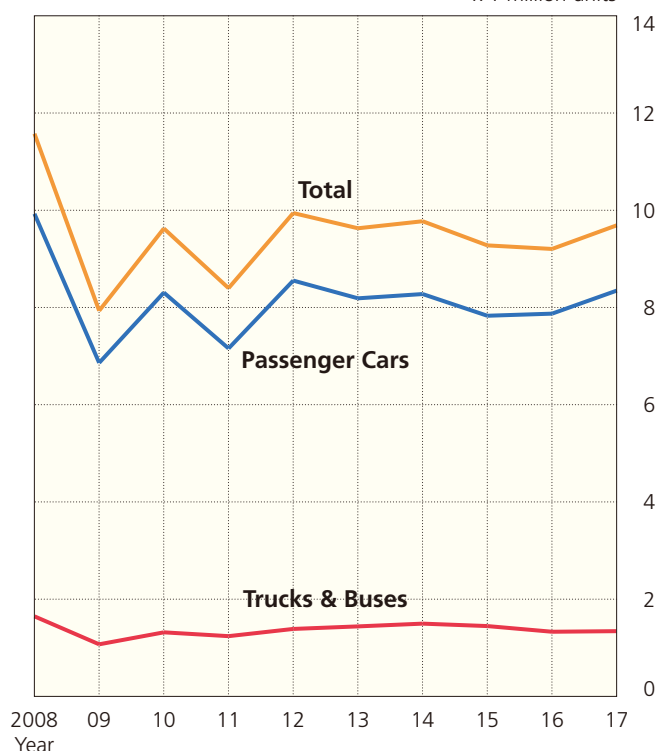
MOTOR VEHICLE PRODUCTION BY TYPE IN 2017

In vehicle units



TRENDS IN MOTOR VEHICLE PRODUCTION

x 1 million units



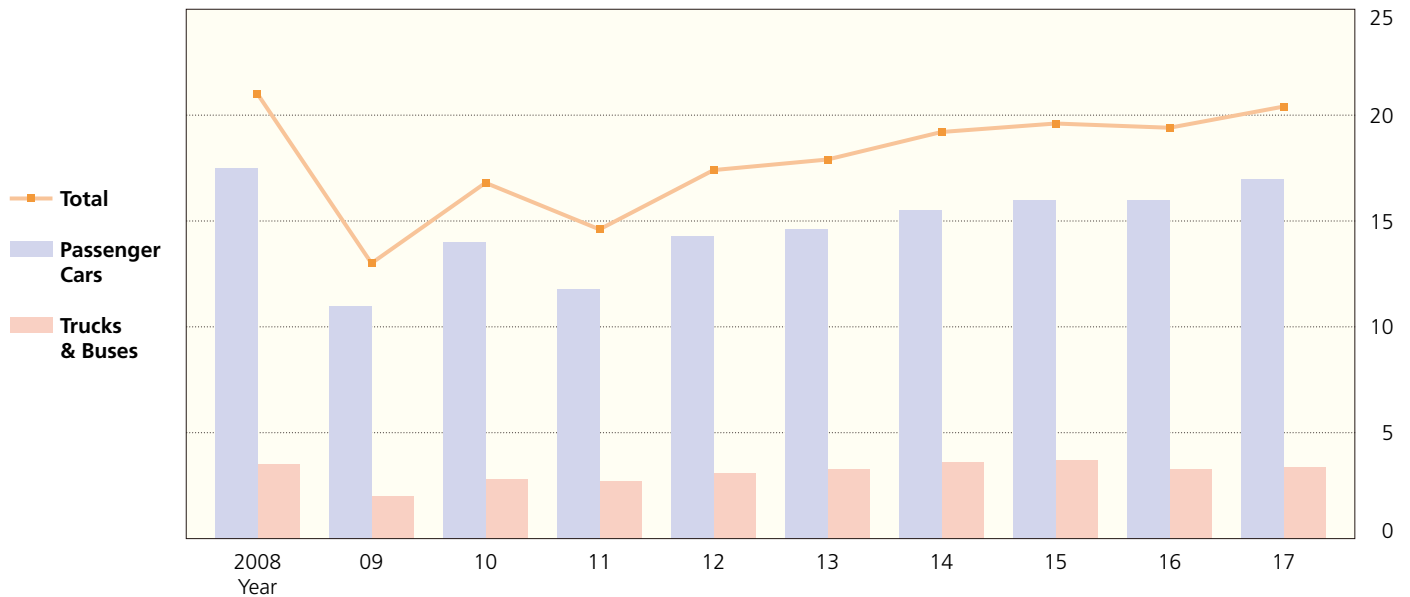
MOTOR VEHICLE PRODUCTION

Year	Passenger Cars					Chg. (%)	Standard	Small
	Standard	Small	Mini	Subtotal				
1970	51,619	2,377,639	749,450	3,178,708	121.7	258,100	1,253,861	
1975	209,032	4,198,550	160,272	4,567,854	116.2	288,170	1,610,475	
1980	403,338	6,438,847	195,923	7,038,108	114.0	885,198	2,113,311	
1985	494,792	6,991,432	160,592	7,646,816	108.1	1,278,212	1,877,893	
1990	1,750,783	7,361,224	835,965	9,947,972	109.9	1,249,525	1,262,943	
1995	2,553,703	4,140,629	916,201	7,610,533	97.5	824,140	909,321	
2000	3,376,447	3,699,893	1,283,094	8,359,434	103.2	649,180	483,282	
2005	4,191,360	3,416,622	1,408,753	9,016,735	103.4	723,663	436,763	
2008	5,786,333	2,714,413	1,427,397	9,928,143	99.8	734,923	329,758	
2009	3,459,589	2,145,279	1,257,293	6,862,161	69.1	371,686	215,139	
2010	4,846,411	2,159,119	1,304,832	8,310,362	121.1	520,627	238,776	
2011	4,180,361	1,861,279	1,116,885	7,158,525	86.1	512,260	234,586	
2012	4,686,396	2,252,672	1,615,435	8,554,503	119.5	583,156	275,992	
2013	4,618,014	1,888,759	1,682,550	8,189,323	95.7	580,012	300,635	
2014	4,657,765	1,750,895	1,868,410	8,277,070	101.1	604,768	327,928	
2015	4,744,471	1,555,548	1,530,703	7,830,722	94.6	586,645	330,814	
2016	4,999,566	1,610,486	1,263,834	7,873,886	100.6	505,970	317,182	
2017	5,147,256	1,715,970	1,484,610	8,347,836	106.0	515,521	292,901	

Notes: 1. Passenger cars and trucks are classified under Japan's Road Vehicles Act in three categories, based primarily on engine capacity: "standard" (over 2,000cc), "small" (661cc-2,000cc), been treated as components since 1988. 3. "Chg. (%)" means change from the previous year (with the previous year's result indexed at 100).

TRENDS IN MOTOR VEHICLE PRODUCTION IN VALUE TERMS

x 1 trillion yen



MOTOR VEHICLE PRODUCTION IN VALUE TERMS

x 1 million yen

Year	Passenger Cars				Trucks					Buses			Total
	Standard	Small	Mini	Subtotal	Standard	Small	Mini	Tractors	Subtotal	Large	Small	Subtotal	
1985	895,041	7,049,323	85,925	8,030,289	1,793,000	1,519,934	679,498	46,745	4,039,177	103,053	101,007	204,060	12,273,526
1990	3,717,356	8,676,715	572,188	12,966,259	1,953,924	1,180,028	591,144	64,913	3,790,009	134,015	66,988	201,003	16,957,271
1995	5,147,637	4,869,427	790,303	10,807,367	1,619,428	849,511	510,579	124,764	3,104,282	107,647	89,441	197,088	14,108,737
2000	6,640,075	4,298,370	1,237,605	12,176,050	1,111,558	543,408	357,765	45,453	2,058,184	80,897	109,007	189,904	14,424,138
2005	9,352,545	4,178,641	1,169,871	14,701,057	1,916,692	588,224	357,615	104,567	2,967,098	127,605	163,069	290,674	17,958,829
2008	13,006,119	3,207,109	1,293,624	17,506,852	2,110,682	463,435	312,374	136,277	3,022,768	136,115	313,594	449,709	20,979,329
2009	7,261,654	2,548,371	1,155,681	10,965,706	1,127,974	312,497	281,888	34,778	1,757,137	109,723	166,115	275,838	12,998,681
2010	10,239,303	2,609,861	1,207,423	14,056,587	1,684,489	358,081	323,800	75,944	2,442,314	118,300	211,359	329,659	16,828,560
2011	8,451,638	2,343,337	1,045,460	11,840,435	1,713,798	351,515	285,454	89,976	2,440,743	97,157	199,301	296,458	14,577,636
2012	9,683,441	3,091,067	1,486,926	14,261,434	1,954,449	422,502	302,836	106,209	2,785,996	120,992	237,199	358,191	17,405,621
2013	10,422,008	2,628,986	1,579,510	14,630,504	1,987,340	479,914	312,959	102,073	2,882,286	119,670	290,001	409,671	17,922,461
2014	11,110,107	2,636,872	1,795,440	15,542,419	2,189,242	546,377	313,522	118,091	3,167,232	124,114	318,410	442,524	19,152,175
2015	12,047,649	2,458,198	1,473,103	15,978,950	2,189,038	576,037	300,368	131,002	3,196,445	139,614	328,498	468,112	19,643,507
2016	12,321,649	2,438,906	1,280,853	16,041,408	1,888,981	566,781	290,991	129,781	2,876,534	172,906	299,220	472,126	19,390,068
2017	12,958,155	2,516,379	1,517,786	16,992,320	1,986,030	539,558	319,178	126,867	2,971,633	175,090	288,317	463,407	20,427,360

Source: Ministry of Economy, Trade and Industry

In vehicle units

Trucks			Buses		Total		Year
Mini	Subtotal	Chg. (%)		Chg. (%)		Chg. (%)	
551,922	2,063,883	102.1	46,566	111.3	5,289,157	113.1	1970
438,987	2,337,632	90.8	36,105	78.8	6,941,591	105.9	1975
914,679	3,913,188	115.2	91,588	146.4	11,042,884	114.6	1980
1,388,583	4,544,688	105.2	79,591	110.2	12,271,095	107.0	1985
986,171	3,498,639	89.0	40,185	95.5	13,486,796	103.5	1990
804,276	2,537,737	93.9	47,266	96.2	10,195,536	96.6	1995
594,356	1,726,818	98.8	54,544	112.7	10,140,796	102.5	2000
546,185	1,706,611	98.6	76,313	126.3	10,799,659	102.7	2005
443,718	1,508,399	98.1	139,102	122.4	11,575,644	99.8	2008
398,276	985,101	65.3	86,795	62.4	7,934,057	68.5	2009
449,776	1,209,179	122.7	109,334	126.0	9,628,875	121.4	2010
389,150	1,135,996	93.9	104,109	95.2	8,398,630	87.2	2011
407,206	1,266,354	111.5	122,220	117.4	9,943,077	118.4	2012
427,530	1,308,177	103.3	132,681	108.6	9,630,181	96.9	2013
425,065	1,357,761	103.8	139,834	105.4	9,774,665	101.5	2014
392,290	1,309,749	96.5	137,850	98.6	9,278,321	94.9	2015
377,921	1,201,073	91.7	129,743	94.1	9,204,702	99.2	2016
411,319	1,219,741	101.6	123,097	94.9	9,690,674	105.3	2017

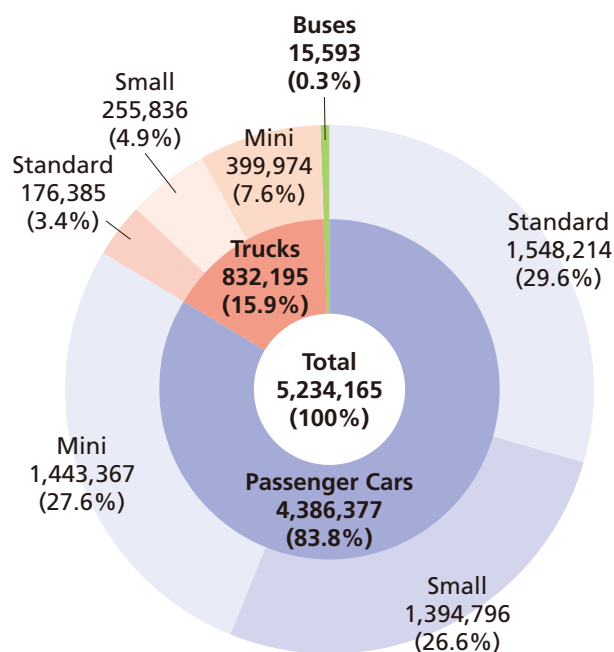
and "mini" (660cc and under); see page 66 for details. 2. KD sets have been excluded since 1979; they represent less than 60% of the cost of compositional components per vehicle and have Sources: Japan Automobile Manufacturers Association; Current Survey of Production, Ministry of Economy, Trade and Industry

Motor Vehicle Sales Show First Increase in 3 Years

Passenger car and commercial vehicle demand in Japan in 2017 totalled 5.23 million units, a 5.3% increase over the previous year. Total passenger car sales grew 5.8% to 4.39 million units, with standard cars rising 3.9% to 1.55 million units, small cars climbing 6.4% to 1.39 million units, and minicars expanding 7.3% to 1.44 million units. Meanwhile, sales of trucks and buses also increased over 2016, growing 3.0% and 0.6% to 832,000 and 16,000 units respectively.

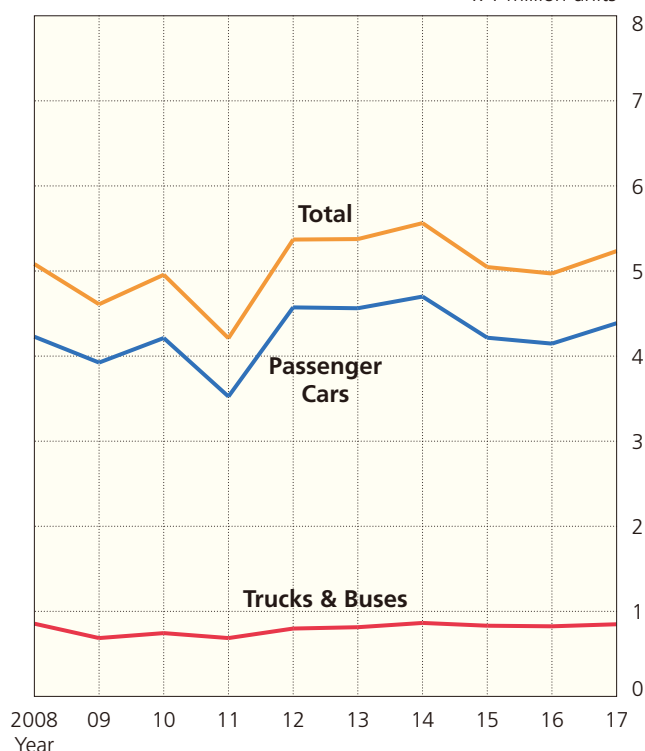
NEW MOTOR VEHICLE REGISTRATIONS BY TYPE IN 2017

In vehicle units



TRENDS IN NEW MOTOR VEHICLE REGISTRATIONS

x 1 million units



NEW MOTOR VEHICLE REGISTRATIONS

Year	Passenger Cars					Trucks				
	Standard	Small	Mini	Subtotal	Chg. (%)	Standard	Small	Mini	Subtotal	Chg. (%)
1970	9,068	1,652,899	717,170	2,379,137	116.8	168,086	986,673	538,743	1,693,502	95.6
1975	49,125	2,531,396	157,120	2,737,641	119.7	121,118	999,155	431,181	1,551,454	100.7
1980	71,931	2,608,215	174,030	2,854,176	94.0	154,472	1,144,167	839,308	2,137,947	102.2
1985	73,539	2,869,527	161,017	3,104,083	100.3	118,009	945,484	1,367,685	2,431,178	104.7
1990	467,490	3,839,221	795,948	5,102,659	115.9	193,775	1,449,678	1,006,456	2,649,909	93.7
1995	889,260	2,654,291	900,355	4,443,906	105.6	177,264	1,411,296	815,265	2,403,825	104.6
2000	770,220	2,208,387	1,281,265	4,259,872	102.5	84,626	1,015,313	586,660	1,686,599	99.6
2005	1,271,349	2,089,992	1,387,068	4,748,409	99.6	197,548	351,708	536,648	1,085,904	101.8
2008	1,250,987	1,549,677	1,426,979	4,227,643	96.1	146,690	249,655	442,914	839,259	89.5
2009	1,160,175	1,480,137	1,283,429	3,923,741	92.8	87,692	180,509	404,742	672,943	80.2
2010	1,419,909	1,507,693	1,284,665	4,212,267	107.4	101,697	187,642	441,755	731,094	108.6
2011	1,139,910	1,246,126	1,138,752	3,524,788	83.7	107,290	185,097	382,393	674,780	92.3
2012	1,411,700	1,602,951	1,557,681	4,572,332	129.7	136,359	227,326	421,765	785,450	116.4
2013	1,399,407	1,472,704	1,690,171	4,562,282	99.8	143,272	235,883	422,820	801,975	102.1
2014	1,437,589	1,422,883	1,839,119	4,699,591	103.0	164,815	252,828	433,671	851,314	106.2
2015	1,354,541	1,349,944	1,511,404	4,215,889	89.7	172,502	259,936	384,796	817,234	96.0
2016	1,490,216	1,311,275	1,344,967	4,146,458	98.4	173,249	254,560	380,493	808,302	98.9
2017	1,548,214	1,394,796	1,443,367	4,386,377	105.8	176,385	255,836	399,974	832,195	103.0

Notes: 1. Chassis-based through 2002, data compilation became vehicle registration number-based as of 2003. 2. Truck figures include special-purpose vehicles (except large ones). 3. Data

NEW MINI-VEHICLE SALES BY TYPE

In vehicle units

Year	Passenger Cars (Minicars)	Commercial Vehicles ("Bonnet" minivans)	Commercial Vehicles (Cab-over-engine minivans)	Commercial Vehicles (Mini-trucks)	Total	
						Chg. (%)
2000	1,281,805	138,672	177,143	277,295	1,874,915	99.7
2001	1,273,570	120,010	175,594	284,346	1,853,520	98.9
2002	1,307,296	101,789	163,412	258,203	1,830,700	98.8
2003	1,291,889	89,532	172,644	250,690	1,804,755	98.6
2004	1,372,083	77,297	183,995	257,775	1,891,150	104.8
2005	1,387,068	77,547	197,141	261,960	1,923,716	101.7
2006	1,507,598	68,714	204,838	242,469	2,023,619	105.2
2007	1,447,106	57,509	196,040	219,164	1,919,819	94.9
2008	1,426,979	51,622	185,806	205,486	1,869,893	97.4
2009	1,283,429	42,932	167,358	194,452	1,688,171	90.3
2010	1,284,665	41,630	180,505	219,620	1,726,420	102.3
2011	1,138,752	33,023	168,705	180,665	1,521,145	88.1
2012	1,557,681	27,730	198,843	195,192	1,979,446	130.1
2013	1,690,171	25,199	194,728	202,893	2,112,991	106.7
2014	1,839,119	22,929	194,431	216,311	2,272,790	107.6
2015	1,511,404	18,536	184,127	182,133	1,896,200	83.4
2016	1,344,967	19,456	185,927	175,110	1,725,460	91.0
2017	1,443,367	16,373	201,873	181,728	1,843,341	106.8

Note: "Chg. (%)" means change from the previous year (with the previous year's result indexed at 100).

Source: Japan Mini Vehicles Association

In vehicle units

Buses				Total	Chg. (%)	Total		Total Mini-		Year
Large	Small	Subtotal	Chg. (%)			Vehicles	Chg. (%)	Vehicles	Chg. (%)	
10,256	17,572	27,828	104.2	4,100,467	106.9	2,844,554	104.9	1,255,913	111.7	1970
8,818	11,018	19,836	87.4	4,308,931	111.9	3,720,630	118.8	588,301	82.1	1975
9,414	13,973	23,387	97.5	5,015,510	97.3	4,002,172	93.1	1,013,338	118.3	1980
8,798	12,775	21,573	106.4	5,556,834	102.2	4,028,132	101.3	1,528,702	104.8	1985
9,162	15,763	24,925	105.9	7,777,493	107.2	5,975,089	107.4	1,802,404	106.3	1990
6,475	10,828	17,303	97.0	6,865,034	105.2	5,149,414	104.8	1,715,620	106.2	1995
4,333	12,238	16,571	114.5	5,963,042	101.7	4,095,117	102.7	1,867,925	99.7	2000
5,856	11,898	17,754	97.8	5,852,067	100.0	3,928,351	99.1	1,923,716	101.7	2005
5,357	9,976	15,333	98.2	5,082,235	94.9	3,212,342	93.5	1,869,893	97.4	2008
4,234	8,338	12,572	82.0	4,609,256	90.7	2,921,085	90.9	1,688,171	90.3	2009
4,777	7,998	12,775	101.6	4,956,136	107.5	3,229,716	110.6	1,726,420	102.3	2010
3,136	7,515	10,651	83.4	4,210,219	84.9	2,689,074	83.3	1,521,145	88.1	2011
4,266	7,672	11,938	112.1	5,369,720	127.5	3,390,274	126.1	1,979,446	130.1	2012
4,181	7,075	11,256	94.3	5,375,513	100.1	3,262,522	96.2	2,112,991	106.7	2013
4,498	7,485	11,983	106.5	5,562,888	103.5	3,290,098	100.8	2,272,790	107.6	2014
5,260	8,127	13,387	111.7	5,046,510	90.7	3,150,310	95.8	1,896,200	83.4	2015
6,543	8,955	15,498	115.8	4,970,258	98.5	3,244,798	103.0	1,725,460	91.0	2016
6,602	8,991	15,593	100.6	5,234,165	105.3	3,390,824	104.5	1,843,341	106.8	2017

includes imported cars. 4. "Chg. (%)" means change from the previous year (with the previous year's result indexed at 100).

Sources: Japan Automobile Dealers Association; Japan Mini Vehicles Association

Imported Vehicle Sales Rise for Second Consecutive Year

Imported vehicle sales in Japan in 2017 totalled 351,000 units, up 2.1% from the previous year, with passenger cars growing 1.8% to 333,000 units and commercial vehicles (trucks and buses) rising 9.4% to 18,000 units. Meanwhile, sales of used imported vehicles increased 5.4% to 560,000 units, with used imported passenger cars and used imported trucks climbing 5.6% to 541,000 units and 1.6% to 16,000 units, respectively.

TRENDS IN IMPORTED MOTOR VEHICLE SALES

In vehicle units

Year	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	
Vehicles produced by non-Japanese manufacturers											
Vehicles produced by Japanese manufacturers abroad											
Vehicles produced by non-Japanese manufacturers	Passenger Cars	192,317	159,143	180,255	203,800	239,546	278,846	288,830	284,471	294,060	305,043
	Commercial Vehicles	1,585	1,761	1,827	2,057	2,017	1,694	1,366	1,025	1,054	1,045
	Total	193,902	160,904	182,082	205,857	241,563	280,540	290,196	285,496	295,114	306,088
Vehicles produced by Japanese manufacturers abroad	Passenger Cars	13,961	8,746	33,028	56,907	61,048	52,440	30,847	28,610	33,547	28,408
	Commercial Vehicles	11,368	8,877	9,973	12,880	13,382	13,153	14,917	14,516	15,012	16,524
	Total	25,329	17,623	43,001	69,787	74,430	65,593	45,764	43,126	48,559	44,932
Passenger Cars Total		206,278	167,889	213,283	260,707	300,594	331,286	319,677	313,081	327,607	333,451
Commercial Vehicles Total		12,953	10,638	11,800	14,937	15,399	14,847	16,283	15,541	16,066	17,569
Grand Totals		219,231	178,527	225,083	275,644	315,993	346,133	335,960	328,622	343,673	351,020
Chg. (%)		82.7	81.4	126.1	122.5	114.6	109.5	97.1	97.8	104.6	102.1

Note: "Chg. (%)" means change from the previous year (with the previous year's result indexed at 100).

Source: Japan Automobile Importers Association

IMPORTED MOTOR VEHICLES (ON CUSTOMS CLEARANCE BASIS)

In vehicle units

Year	Passenger Cars	Chg. (%)	Commercial Vehicles	Other	Total Motor Vehicles	Chg. (%)	Motorcycles
1980	46,285	71.4	547	1,085	47,917	72.2	17,015
1985	52,225	118.3	380	546	53,151	118.4	7,087
1990	251,169	128.6	911	761	252,841	128.6	28,696
1995	401,836	136.0	2,469	390	404,695	130.3	43,936
2000	283,582	109.2	1,470	376	285,428	109.3	74,906
2005	282,654	98.6	1,420	660	284,734	98.4	444,635
2008	228,255	78.3	14,288	796	243,339	82.8	413,817
2009	145,687	63.8	9,088	593	155,368	63.8	367,727
2010	230,791	158.4	11,922	780	243,493	156.7	353,260
2011	273,798	118.6	14,185	816	288,799	118.6	386,949
2012	333,380	121.8	15,107	948	349,435	121.0	421,991
2013	343,730	103.1	16,255	1,348	361,333	103.4	438,737
2014	336,764	98.0	16,662	1,278	354,704	98.2	410,143
2015	320,295	95.1	15,873	820	336,988	95.0	353,519
2016	331,207	103.4	17,455	651	349,313	103.7	341,254
2017	336,950	101.7	20,091	672	357,713	102.4	458,415

Notes: 1. "Other" denotes special-purpose vehicles and engine-mounted chassis. 2. "Chg. (%)" means change from the previous year (with the previous year's result indexed at 100).

Source: Trade Statistics of Japan, Ministry of Finance

USED IMPORTED VEHICLE SALES

In vehicle units

Year	Passenger Cars	Chg. (%)	Trucks	Chg. (%)	Special-Purpose Vehicles	Chg. (%)	Other	Total	Chg. (%)
2008	504,710	92.9	12,441	99.4	13,292	75.6	355	530,798	92.6
2009	470,986	93.3	12,547	100.9	10,083	75.9	165	493,781	93.0
2010	461,050	97.9	13,381	106.6	7,878	78.1	182	482,491	97.7
2011	462,435	100.3	14,370	107.4	6,756	85.8	164	483,725	100.3
2012	487,675	105.5	14,636	101.9	5,469	81.0	248	508,028	105.0
2013	487,750	100.0	15,428	105.4	4,724	86.4	220	508,122	100.0
2014	485,055	99.4	15,156	98.2	3,963	83.9	185	504,359	99.3
2015	495,170	102.1	15,373	101.4	3,649	92.1	171	514,363	102.0
2016	512,294	103.5	15,736	102.4	3,103	85.0	202	531,335	103.3
2017	540,946	105.6	15,984	101.6	2,946	94.9	162	560,038	105.4

Notes: 1. For motor vehicle classifications in Japan, see page 66. 2. "Other" includes buses, large special-purpose vehicles and small-sized three-wheeled trucks. 3. "Chg. (%)" means change from the previous year (with the previous year's result indexed at 100).

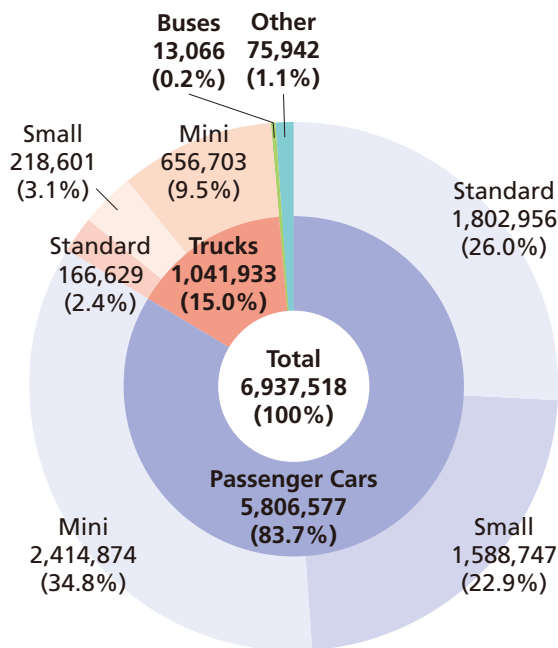
Source: Japan Automobile Importers Association

Used Vehicle Sales Increase for First Time in 5 Years

In 2017 sales of used motor vehicles were up 2.7% from the previous year to total 6.94 million units. Used passenger car sales grew 3.4% to 5.81 million units, with standard passenger cars climbing 4.3% to 1.80 million units, small cars increasing 1.5% to 1.59 million units, and minicars rising 4.0% to 2.41 million units. Sales of used trucks and buses slid 0.8% and 1.0%, to 1.04 million units and 13,000 units respectively.

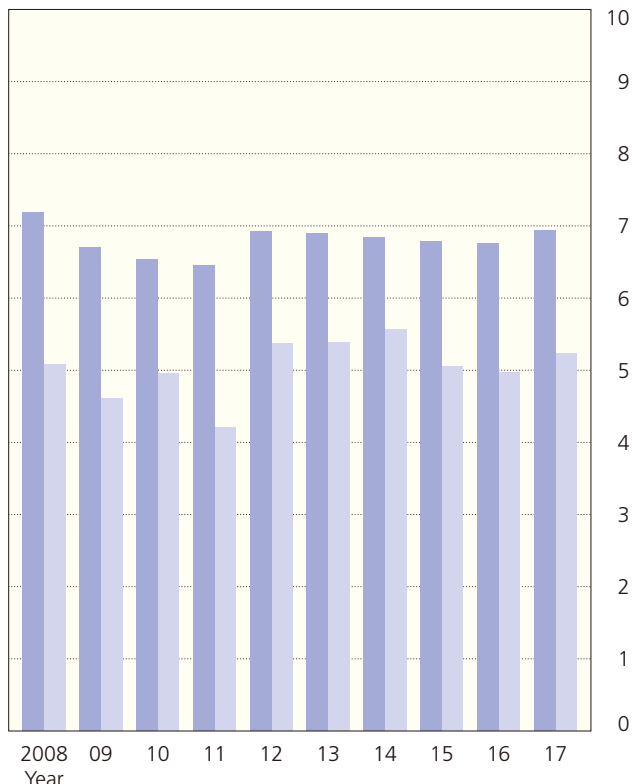
USED VEHICLE SALES BY TYPE IN 2017

In vehicle units



TRENDS IN NEW AND USED MOTOR VEHICLE SALES

Used vehicles New vehicles x 1 million units



USED MOTOR VEHICLE SALES

In vehicle units

Year	Passenger Cars					Trucks					Buses		Other		Total	
	Standard	Small	Mini	Subtotal	Chg. (%)	Standard	Small	Mini	Subtotal	Chg. (%)		Chg. (%)		Chg. (%)		Chg. (%)
1985	160,150	3,295,092	356,726	3,811,968	100.9	139,459	589,321	1,125,545	1,854,325	108.3	11,655	103.1	44,620	116.7	5,722,568	103.3
1990	304,193	3,945,086	304,782	4,554,061	106.2	185,851	555,634	1,746,495	2,487,980	102.1	13,377	98.3	54,118	107.3	7,109,536	104.7
1995	994,311	3,845,076	727,259	5,566,646	106.6	221,523	521,244	1,538,718	2,281,485	102.2	13,327	105.4	84,409	119.1	7,945,867	105.4
2000	1,742,786	3,050,087	1,448,546	6,241,419	104.8	201,714	412,511	1,169,626	1,783,851	99.1	15,173	102.7	173,475	105.2	8,213,918	103.5
2005	2,002,563	2,460,410	1,890,154	6,353,127	101.0	240,060	368,778	980,714	1,589,552	101.8	18,871	109.5	144,910	106.4	8,106,460	101.3
2008	1,728,090	1,944,766	1,995,333	5,668,189	95.4	225,848	278,673	884,836	1,389,357	95.2	16,193	98.6	104,516	89.9	7,178,255	95.3
2009	1,619,370	1,855,071	1,864,874	5,339,315	94.2	194,180	266,395	787,957	1,248,532	89.9	15,293	94.4	95,452	91.3	6,698,592	93.3
2010	1,592,110	1,816,696	1,873,466	5,282,272	98.9	177,327	245,642	732,854	1,155,823	92.6	14,163	92.6	87,238	91.4	6,539,496	97.6
2011	1,542,614	1,733,519	1,906,523	5,182,656	98.1	168,470	233,556	769,613	1,171,639	101.4	13,849	97.8	82,007	94.0	6,450,151	98.6
2012	1,688,606	1,826,335	2,133,725	5,648,666	109.0	168,439	235,246	769,469	1,173,154	100.1	14,799	106.9	82,484	100.6	6,919,103	107.3
2013	1,666,732	1,740,725	2,255,560	5,663,017	100.3	167,793	223,734	746,631	1,138,158	97.0	12,830	86.7	81,016	98.2	6,895,021	99.7
2014	1,630,421	1,653,214	2,367,235	5,650,870	99.8	163,536	215,295	721,406	1,100,237	96.7	12,531	97.7	76,536	94.5	6,840,174	99.2
2015	1,668,429	1,602,719	2,354,077	5,625,225	99.5	162,130	211,480	700,589	1,074,199	97.6	13,173	105.1	74,217	97.0	6,786,814	99.2
2016	1,729,194	1,564,982	2,322,533	5,616,709	99.8	161,717	217,544	670,935	1,050,196	97.8	13,204	100.2	76,013	102.4	6,756,122	99.5
2017	1,802,956	1,588,747	2,414,874	5,806,577	103.4	166,629	218,601	656,703	1,041,933	99.2	13,066	99.0	75,942	99.9	6,937,518	102.7

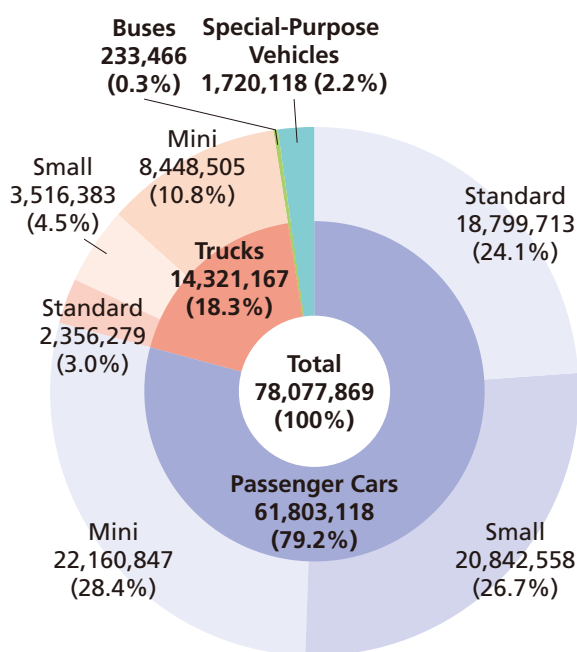
Notes: 1. Passenger cars and trucks are classified under Japan's Road Vehicles Act in three categories, based primarily on engine capacity: "standard" (over 2,000cc), "small" (661cc-2,000cc), and "mini" (660cc and under); see page 66 for details. 2. Includes imported vehicles. 3. "Other" refers to emergency vehicles, special vehicles equipped with beds, refrigerated trucks, tank trucks, tractors, bulldozers, steamrollers, snowplows, snowmobiles, etc., that are assigned special registration numbers. 4. "Chg. (%)" means change from the previous year (with the previous year's result indexed at 100). Sources: Japan Automobile Dealers Association; Japan Mini Vehicles Association

Continued Increase in Number of Motor Vehicles in Use

At the end of December 2017, motor vehicles in use in Japan (excluding motorcycles) totalled 78.1 million units, a 0.4% increase over the previous year. Passenger cars in use increased 0.7% to 61.8 million units, with standard and minicars growing 2.4% and 1.4% to 18.8 million and 22.2 million units respectively, but small cars dropping 1.7% to 20.8 million units. Meanwhile, trucks in use slipped 0.6% from 2016 to 14.3 million units, whereas buses in use rose 0.5% to 233,000 units. At the end of March 2017, the average service life of motor vehicles in Japan was 12.91 years for passenger cars, 14.37 years for trucks, and 17.39 years for buses.

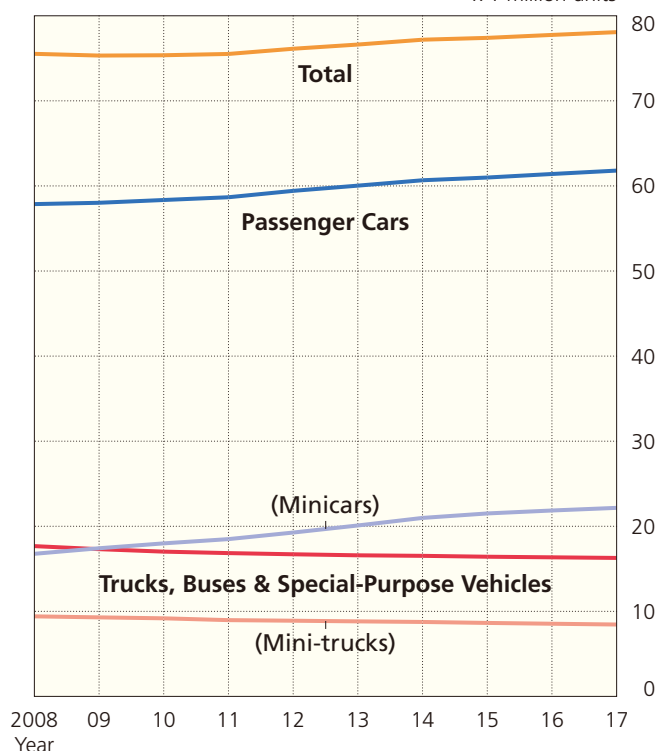
MOTOR VEHICLES IN USE BY TYPE AT END OF 2017

In vehicle units



TRENDS IN MOTOR VEHICLES IN USE

x 1 million units

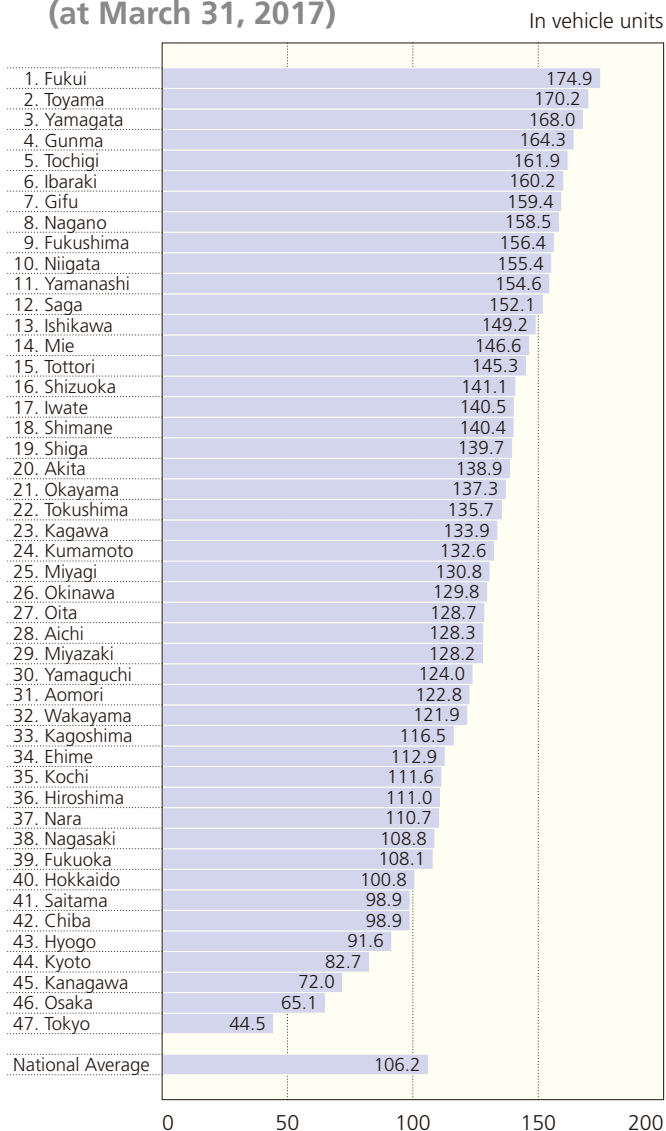


MOTOR VEHICLES IN USE (at end of every calendar year)

Year	Passenger Cars					Trucks				
	Standard	Small	Mini	Subtotal	Chg. (%)	Standard	Small	Mini	Subtotal	Chg. (%)
1970	77,374	6,457,181	2,244,417	8,778,972	126.6	798,256	4,478,486	3,005,017	8,281,759	107.1
1975	207,511	14,417,680	2,611,130	17,236,321	108.7	1,158,465	6,100,206	2,785,182	10,043,853	98.9
1980	472,314	21,011,096	2,176,110	23,659,520	104.4	1,494,464	7,155,221	4,527,794	13,177,479	104.8
1985	711,914	25,116,179	2,016,487	27,844,580	102.6	1,668,852	6,679,665	8,791,289	17,139,806	105.5
1990	1,784,594	30,554,652	2,584,926	34,924,172	107.1	2,176,488	6,609,536	12,535,415	21,321,439	101.1
1995	7,874,189	31,030,462	5,775,386	44,680,037	104.7	2,574,433	6,213,405	11,642,311	20,430,149	98.9
2000	13,942,626	28,593,491	9,901,258	52,437,375	102.5	2,596,421	5,474,660	10,154,427	18,225,508	97.8
2005	16,634,529	26,254,546	14,201,714	57,090,789	102.0	2,474,378	4,594,363	9,665,130	16,733,871	99.7
2008	16,748,373	24,356,113	16,760,486	57,864,972	100.4	2,386,255	4,102,553	9,407,694	15,896,502	97.7
2009	16,688,645	23,919,019	17,412,189	58,019,853	100.3	2,319,612	3,952,534	9,288,679	15,560,825	97.9
2010	16,890,402	23,470,003	17,986,982	58,347,387	100.6	2,281,711	3,825,632	9,177,282	15,284,625	98.2
2011	17,039,684	23,143,892	18,486,738	58,670,314	100.6	2,266,420	3,740,361	8,963,641	14,970,422	97.9
2012	17,294,021	22,868,749	19,258,239	59,421,009	101.3	2,266,836	3,672,649	8,895,635	14,835,120	99.1
2013	17,509,103	22,435,835	20,090,359	60,035,297	101.0	2,270,812	3,614,925	8,818,149	14,703,886	99.1
2014	17,714,352	21,974,741	20,978,424	60,667,517	101.1	2,294,449	3,581,884	8,748,653	14,624,986	99.5
2015	17,935,861	21,547,282	21,504,199	60,987,342	100.5	2,316,208	3,552,373	8,634,637	14,503,218	99.2
2016	18,357,734	21,195,621	21,850,275	61,403,630	100.7	2,337,230	3,535,022	8,539,701	14,411,953	99.4
2017	18,799,713	20,842,558	22,160,847	61,803,118	100.7	2,356,279	3,516,383	8,448,505	14,321,167	99.4

Notes: 1. "Special-purpose vehicles" refers to emergency vehicles, special vehicles equipped with beds, refrigerated trucks, tank trucks, tractors, bulldozers, steamrollers, snowplows, vehicles. 3. "Chg. (%)" means change from the previous year (with the previous year's result indexed at 100).

● PRIVATE PASSENGER CARS IN USE PER 100 HOUSEHOLDS BY PREFECTURE (at March 31, 2017)



Source: Automobile Inspection & Registration Information Association

● PASSENGER CARS IN USE BY YEAR OF FIRST REGISTRATION

At March 31, 2017

Year of First Registration	Vehicles in Use	% of "Vehicles in Use" Total
April 2016-March 2017	2,866,925	7.26
April 2015-March 2016	2,613,070	6.62
April 2014-March 2015	2,580,771	6.54
April 2013-March 2014	2,846,032	7.21
April 2012-March 2013	2,680,350	6.79
April 2011-March 2012	2,424,667	6.14
April 2010-March 2011	2,324,947	5.89
April 2009-March 2010	2,460,102	6.23
April 2008-March 2009	2,004,862	5.08
April 2007-March 2008	2,195,153	5.56
April 2006-March 2007	2,158,487	5.47
April 2005-March 2006	2,123,376	5.38
April 2004-March 2005	1,955,692	4.95
April 2003-March 2004	1,581,238	4.00
-March 2003	6,676,293	16.90
Total "Vehicles in Use"	39,491,965	100.00

● AVERAGE AGE BY TYPE

In years

Year	Passenger Cars	Trucks	Buses
2008	7.23	8.98	10.02
2009	7.48	9.16	10.26
2010	7.56	9.62	10.50
2011	7.74	10.04	10.78
2012	7.95	10.43	11.12
2013	8.07	10.73	11.38
2014	8.13	10.93	11.56
2015	8.29	11.09	11.76
2016	8.44	11.23	11.87
2017	8.53	11.32	11.84

● AVERAGE SERVICE LIFE BY TYPE

In years

Year	Passenger Cars	Trucks	Buses
2008	11.67	11.72	15.62
2009	11.68	13.50	15.00
2010	12.70	12.72	16.59
2011	12.43	13.04	17.37
2012	12.16	12.81	16.82
2013	12.58	13.24	17.91
2014	12.64	13.31	17.63
2015	12.38	13.72	16.95
2016	12.76	13.89	16.83
2017	12.91	14.37	17.39

Notes: 1. "Average age" means the average number of years elapsed since first registration. 2. "Average service life" means average vehicle lifespan. 3. "Average age" and "average service life" figures are as at the end of every fiscal year. 4. The above three tables exclude mini-vehicles.

Source: Automobile Inspection & Registration Information Association

In vehicle units

Buses				Special-Purpose Vehicles		Total		Trailers	Three-Wheeled Vehicles	Year
Large	Small	Subtotal	Chg. (%)		Chg. (%)		Chg. (%)			
104,895	83,085	187,980	110.5	333,132	110.5	17,581,843	116.2	23,079	243,934	1970
102,186	124,098	226,284	101.7	584,100	101.7	28,090,558	104.9	39,808	47,998	1975
106,633	123,387	230,020	100.4	789,155	100.4	37,856,174	104.5	56,804	17,724	1980
108,967	122,261	231,228	100.5	941,647	100.5	46,157,261	103.7	65,485	6,123	1985
114,819	130,849	245,668	101.6	1,206,390	101.6	57,697,669	104.7	87,359	4,056	1990
114,478	128,617	243,095	99.1	1,500,219	99.1	66,853,500	102.8	120,171	3,621	1995
110,046	125,437	235,483	99.9	1,750,733	99.9	72,649,099	101.3	133,676	3,827	2000
109,917	121,816	231,733	100.3	1,630,062	98.8	75,686,455	101.4	147,626	3,280	2005
109,808	120,873	230,681	99.9	1,536,160	96.9	75,528,315	99.8	157,951	3,119	2008
108,760	119,637	228,397	99.0	1,515,411	98.6	75,324,486	99.7	152,381	3,127	2009
108,136	119,135	227,271	99.5	1,502,593	99.2	75,361,876	100.0	152,834	3,120	2010
107,435	118,513	225,948	99.4	1,646,203	109.6	75,512,887	100.2	154,100	3,089	2011
107,528	118,551	226,079	100.1	1,643,325	99.8	76,125,533	100.8	155,835	14,816	2012
107,723	118,204	225,927	99.9	1,653,956	100.6	76,619,066	100.6	157,212	15,478	2013
108,545	118,399	226,944	100.5	1,669,019	100.9	77,188,466	100.7	159,863	16,376	2014
110,096	119,293	229,389	101.1	1,684,382	100.9	77,404,331	100.3	162,350	17,391	2015
112,011	120,310	232,321	101.3	1,702,616	101.1	77,750,520	100.4	165,769	18,494	2016
112,672	120,794	233,466	100.5	1,720,118	101.0	78,077,869	100.4	169,989	19,457	2017

snowmobiles, etc., that are identified as special-purpose vehicles by special registration numbers. 2. "Three-wheeled vehicles" includes three-wheeled passenger cars, trucks, and special-purpose
Source: Ministry of Land, Infrastructure, Transport and Tourism

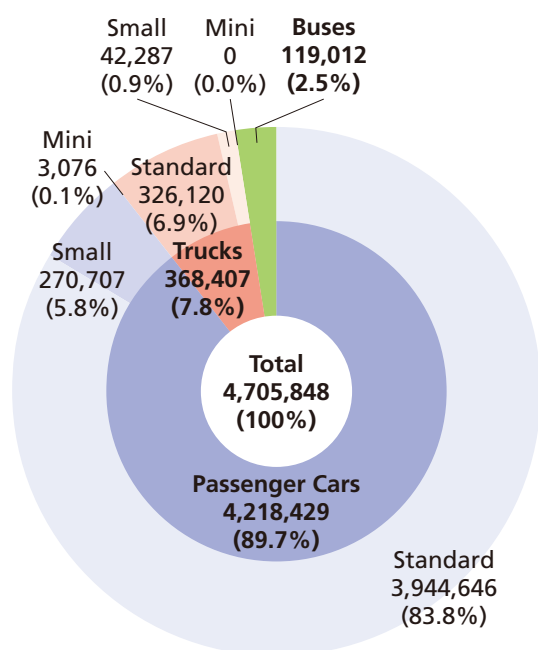
Motor Vehicle Exports Increase for Third Consecutive Year

Exports of motor vehicles in 2017 totalled 4.71 million units, with passenger car exports rising 2.4% from the previous year to 4.22 million units while truck exports were tallied at 368,000 units and bus exports at 119,000 units.

(Exceptionally, year-on-year increase/decrease rates for total exports as well as for truck and bus exports in 2017 are not available owing to incomplete data; see note 4. below.)

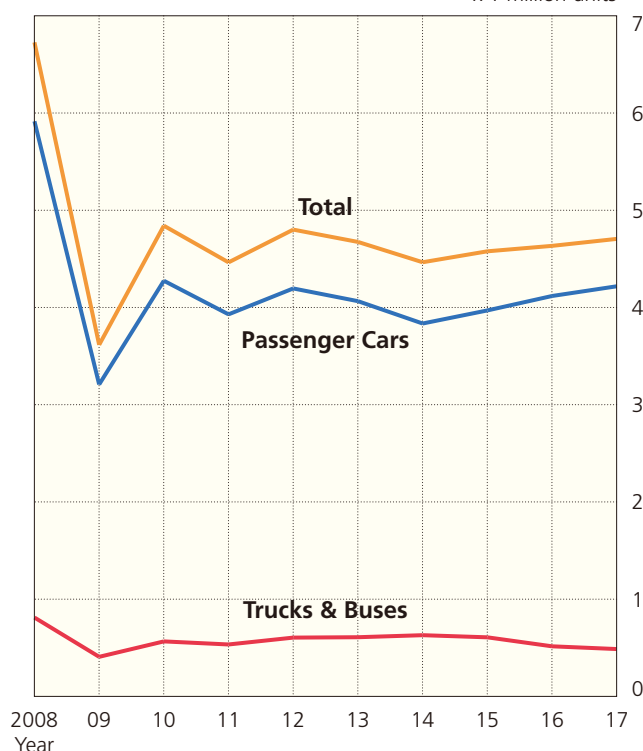
MOTOR VEHICLE EXPORTS BY TYPE IN 2017

In vehicle units



TRENDS IN MOTOR VEHICLE EXPORTS

x 1 million units



MOTOR VEHICLE EXPORTS

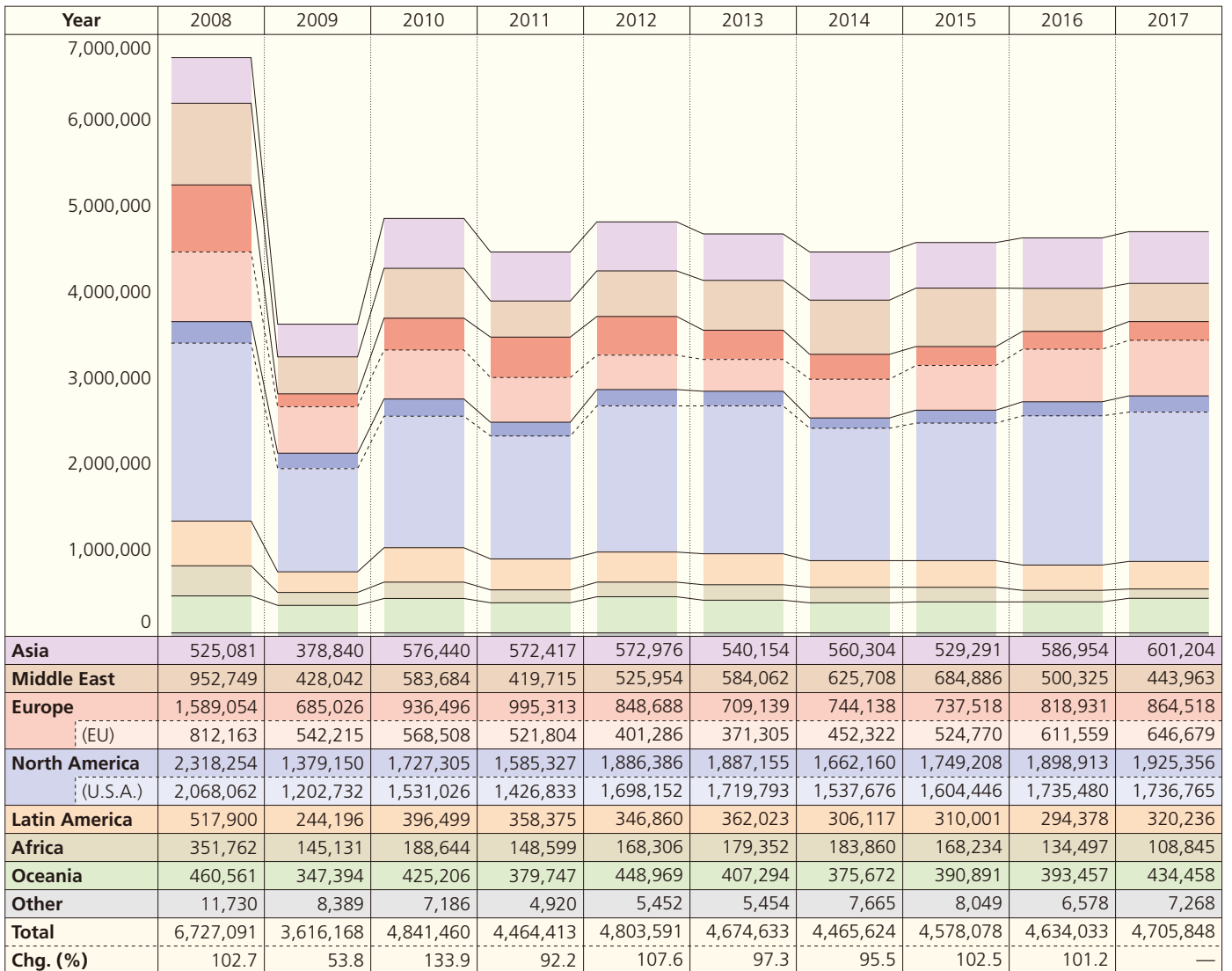
Year	Passenger Cars					Chg. (%)	Standard	Small
	Standard	Small	Mini	Subtotal				
1970	715,450		10,136	725,586	129.5	65,170	272,549	
1975	1,821,835		5,451	1,827,286	105.8	168,370	643,232	
1980	345,413	3,580,623	21,124	3,947,160	127.2	332,257	1,548,251	
1985	493,047	3,932,414	1,301	4,426,762	111.2	1,196,973	1,029,757	
1990	1,343,967	3,138,147	16	4,482,130	101.8	944,737	364,376	
1995	1,156,122	1,732,050	8,044	2,896,216	86.2	612,654	236,929	
2000	2,333,263	1,462,069	520	3,795,852	101.0	530,823	86,329	
2005	3,164,603	1,198,273	292	4,363,168	103.5	521,848	89,946	
2008	4,379,569	1,534,975	885	5,915,429	101.8	567,596	90,581	
2009	2,403,359	804,980	300	3,208,639	54.2	267,060	48,447	
2010	3,453,951	818,660	2,755	4,275,366	133.2	397,404	52,908	
2011	3,176,195	743,509	10,200	3,929,904	91.9	369,973	53,786	
2012	3,550,010	641,749	6,735	4,198,494	106.8	410,251	66,652	
2013	3,564,559	499,541	1,419	4,065,519	96.8	397,694	74,465	
2014	3,593,941	239,198	2,456	3,835,595	94.3	408,859	79,614	
2015	3,759,771	205,727	4,505	3,970,003	103.5	392,531	74,245	
2016	3,871,859	241,206	5,367	4,118,432	103.7	339,821	44,138	
2017	3,944,646	270,707	3,076	4,218,429	102.4	326,120	42,287	

Notes: 1. Figures represent ex-factory export shipments of motor vehicles manufactured in Japan, which are classified in the above categories as per Japanese law, including the Road Vehicles cost of compositional components per vehicle and have been treated as components since 1988. 4. Export figures for December 2017 do not include data from one JAMA member

MOTOR VEHICLE EXPORT TRENDS BY DESTINATION

Asia Middle East Europe North America Latin America Africa Oceania Other
(EU) (U.S.A.)

In vehicle units



Note: "Chg. (%)" means change from the previous year (with the previous year's result indexed at 100).

In vehicle units

Trucks			Buses		Total		Year
Mini	Subtotal	Chg. (%)		Chg. (%)		Chg. (%)	
13,892	351,611	120.9	9,579	141.6	1,086,776	126.7	1970
22,071	833,673	95.3	16,653	104.3	2,677,612	102.3	1975
73,177	1,953,685	137.2	66,116	179.4	5,966,961	130.8	1980
11,374	2,238,104	108.0	65,606	116.7	6,730,472	110.2	1985
8	1,309,121	90.6	39,961	113.7	5,831,212	99.1	1990
276	849,859	82.8	44,734	60.8	3,790,809	85.0	1995
718	617,870	100.8	41,163	107.3	4,454,885	101.0	2000
162	611,956	89.0	77,937	139.6	5,053,061	101.9	2005
41	658,218	106.8	153,444	126.3	6,727,091	102.7	2008
0	315,507	47.9	92,022	60.0	3,616,168	53.8	2009
0	450,312	142.7	115,782	125.8	4,841,460	133.9	2010
8	423,767	94.1	110,742	95.6	4,464,413	92.2	2011
16	476,919	112.5	128,178	115.7	4,803,591	107.6	2012
20	472,179	99.0	136,935	106.8	4,674,633	97.3	2013
0	488,473	103.5	141,556	103.4	4,465,624	95.5	2014
0	466,776	95.6	141,299	99.8	4,578,078	102.5	2015
0	383,959	82.3	131,642	93.2	4,634,033	101.2	2016
0	368,407	—	119,012	—	4,705,848	—	2017

Act. 2. Vehicle type classification in this table differs somewhat from that used in Ministry of Finance export data. 3. KD sets have been excluded since 1979; they represent less than 60% of the manufacturer. 5. "Chg. (%)" means change from the previous year (with the previous year's result indexed at 100). Source: Japan Automobile Manufacturers Association

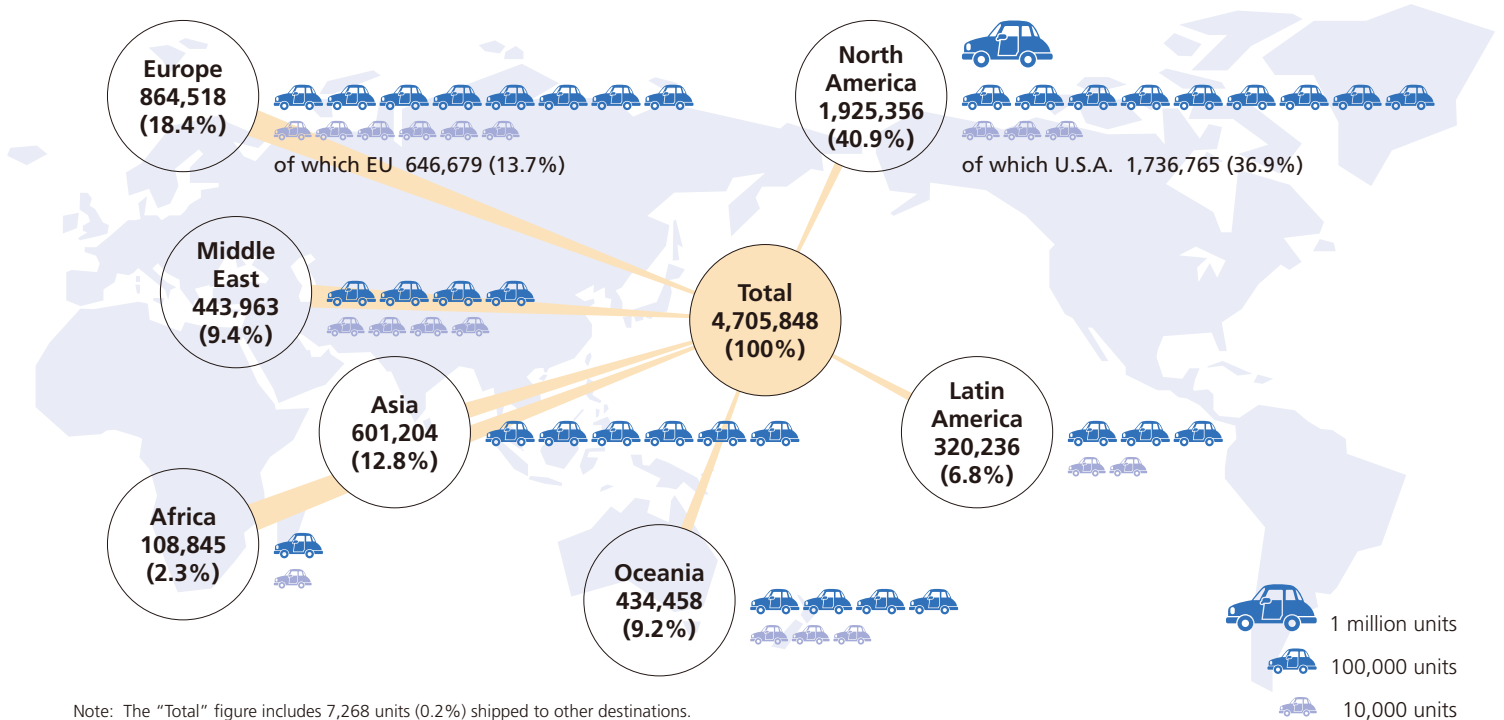
An Increase in Motor Vehicle Exports to Oceania, Latin America, Europe, Asia, and North America

Compared to the previous year, motor vehicle exports in 2017 climbed to Oceania (434,000 units), Latin America (320,000 units), Europe (865,000 units), Asia (601,000 units), and North America (1.93 million units), but declined to Africa (109,000 units) and the Middle East (444,000 units).

(Exceptionally, year-on-year increase/decrease rates for export destinations in 2017 are not available owing to incomplete data; see note on opposite page.)

MOTOR VEHICLE EXPORTS BY DESTINATION IN 2017

In vehicle units



Note: The "Total" figure includes 7,268 units (0.2%) shipped to other destinations.

MOTOR VEHICLE EXPORT TRENDS BY DESTINATION

In %

Destination	2008	09	10	11	12	13	14	15	16	17
Asia	7.8	10.5	11.9	12.8	11.9	11.6	12.5	11.6	12.7	12.8
Middle East	14.2	11.8	12.1	9.4	11.0	12.5	14.0	15.0	10.8	9.4
Europe	23.6	19.0	19.3	22.3	17.7	15.2	16.7	16.1	17.7	18.4
(EU)	(12.1)	(15.0)	(11.7)	(11.7)	(8.4)	(7.9)	(10.1)	(11.5)	(13.2)	(13.7)
North America	34.5	38.1	35.7	35.5	39.3	40.4	37.2	38.2	41.0	40.9
(U.S.A.)	(30.7)	(33.3)	(31.6)	(32.0)	(35.4)	(36.8)	(34.4)	(35.0)	(37.5)	(36.9)
Latin America	7.7	6.8	8.2	8.0	7.2	7.7	6.9	6.8	6.3	6.8
Africa	5.2	4.0	3.9	3.4	3.5	3.8	4.1	3.7	2.9	2.3
Oceania	6.8	9.6	8.8	8.5	9.3	8.7	8.4	8.5	8.5	9.2
Other	0.2	0.2	0.1	0.1	0.1	0.1	0.2	0.1	0.1	0.2

MOTOR VEHICLE EXPORTS BY DESTINATION & BY VEHICLE TYPE IN 2017

In vehicle units

Destination		Passenger Cars				Trucks				Buses	Total	
		Standard	Small	Mini	Subtotal	Standard	Small	Mini	Subtotal			
Asia	South Korea	28,799	1	0	28,800	234	0	0	234	0	29,034	
	China	195,786	5,228	0	201,014	301	0	0	301	840	202,155	
	Taiwan	75,099	3,603	0	78,702	9,005	305	0	9,310	809	88,821	
	Hong Kong	11,488	4,990	179	16,657	5,243	2,621	0	7,864	910	25,431	
	Thailand	1,244	2	0	1,246	6,056	0	0	6,056	10,623	17,925	
	Singapore	25,077	1,239	0	26,316	7,504	538	0	8,042	261	34,619	
	Malaysia	18,587	3,093	0	21,680	13,636	3,204	0	16,840	1,082	39,602	
	Philippines	17,713	1,313	4	19,030	10,222	1,927	0	12,149	27,618	58,797	
	Indonesia	14,583	1,725	2	16,310	15,990	0	0	15,990	4,153	36,453	
	Pakistan	140	4,949	0	5,089	8,334	216	0	8,550	1,431	15,070	
	Other	27,752	1,148	510	29,410	15,340	5,220	0	20,560	3,327	53,297	
Subtotal		416,268	27,291	695	444,254	91,865	14,031	0	105,896	51,054	601,204	
Middle East	Bahrain	11,924	81	0	12,005	1,627	343	0	1,970	1,039	15,014	
	Saudi Arabia	52,850	160	0	53,010	18,659	862	0	19,521	1,495	74,026	
	Kuwait	30,396	45	0	30,441	1,964	714	0	2,678	1,817	34,936	
	Oman	42,607	132	0	42,739	12,576	595	0	13,171	2,973	58,883	
	Israel	33,910	7,483	0	41,393	1,530	0	0	1,530	0	42,923	
	United Arab Emirates	97,453	724	0	98,177	14,570	8,147	0	22,717	4,352	125,246	
	Qatar	16,388	106	0	16,494	1,718	874	0	2,592	1,652	20,738	
	Other	56,164	364	51	56,579	13,339	901	0	14,240	1,378	72,197	
Subtotal		341,692	9,095	51	350,838	65,983	12,436	0	78,419	14,706	443,963	
Europe	Sweden	21,961	1,594	0	23,555	0	0	0	0	0	23,555	
	Denmark	6,090	4,891	0	10,981	0	0	0	0	0	10,981	
	UK	92,476	53,473	0	145,949	1	0	0	1	0	145,950	
	Netherlands	14,451	6,060	0	20,511	13	0	0	13	0	20,524	
	Belgium	17,475	3,716	0	21,191	0	0	0	0	0	21,191	
	France	41,736	16,051	2,140	59,927	0	0	0	0	0	59,927	
	Germany	106,347	22,452	0	128,799	0	0	0	0	0	128,799	
	Spain	57,245	3,090	0	60,335	0	0	0	0	0	60,335	
	Italy	43,172	16,813	0	59,985	5,908	0	0	5,908	0	65,893	
	Finland	9,783	745	0	10,528	11	0	0	11	0	10,539	
	Poland	22,775	1,769	0	24,544	0	0	0	0	0	24,544	
	Austria	15,927	4,306	0	20,233	70	0	0	70	44	20,347	
	Greece	332	2,687	0	3,019	0	0	0	0	0	3,019	
	Other	40,704	8,176	0	48,880	2,195	0	0	2,195	0	51,075	
	Subtotal		490,474	145,823	2,140	638,437	8,198	0	0	8,198	44	646,679
	Norway	18,595	2,044	131	20,770	301	0	0	301	0	21,071	
	Switzerland	15,711	4,966	30	20,707	0	0	0	0	0	20,707	
	Russia	133,922	326	0	134,248	7,339	1,596	0	8,935	0	143,183	
	Turkey	6,129	961	0	7,090	4,507	0	0	4,507	0	11,597	
	Ukraine	17,122	97	0	17,219	488	0	0	488	0	17,707	
Other	2,956	618	0	3,574	0	0	0	0	0	3,574		
Subtotal		684,909	154,835	2,301	842,045	20,833	1,596	0	22,429	44	864,518	
North America	Canada	183,026	2,207	0	185,233	3,358	0	0	3,358	0	188,591	
	U.S.A.	1,690,286	17,128	0	1,707,414	27,171	2,180	0	29,351	0	1,736,765	
	Subtotal		1,873,312	19,335	0	1,892,647	30,529	2,180	0	32,709	0	1,925,356
Latin America	Mexico	95,149	15,912	0	111,061	15,539	541	0	16,080	8,504	135,645	
	Puerto Rico	8,435	233	0	8,668	2	0	0	2	0	8,670	
	Colombia	16,746	434	0	17,180	7,074	118	0	7,192	800	25,172	
	Ecuador	7,523	312	0	7,835	2,042	0	0	2,042	1,264	11,141	
	Peru	15,818	786	0	16,604	3,270	1,348	0	4,618	2,300	23,522	
	Chile	41,936	4,716	0	46,652	2,445	337	0	2,782	408	49,842	
	Brazil	9,864	0	0	9,864	0	0	0	0	0	9,864	
	Other	30,107	6,838	29	36,974	11,389	1,905	0	13,294	6,112	56,380	
Subtotal		225,578	29,231	29	254,838	41,761	4,249	0	46,010	19,388	320,236	
Africa	Algeria	951	2	0	953	948	48	0	996	0	1,949	
	Egypt	6,488	0	0	6,488	4,871	1,500	0	6,371	1,548	14,407	
	Nigeria	112	0	0	112	57	36	0	93	708	913	
	Kenya	168	0	0	168	4,358	204	0	4,562	50	4,780	
	South Africa	28,901	1,108	0	30,009	9,701	1,506	0	11,207	18,807	60,023	
	Other	11,266	565	0	11,831	9,771	774	0	10,545	4,397	26,773	
Subtotal		47,886	1,675	0	49,561	29,706	4,068	0	33,774	25,510	108,845	
Oceania	Australia	312,369	20,999	0	333,368	34,119	3,052	0	37,171	3,109	373,648	
	New Zealand	35,379	7,830	0	43,209	5,190	533	0	5,723	649	49,581	
	Other	5,250	416	0	5,666	2,909	142	0	3,051	2,512	11,229	
	Subtotal		352,998	29,245	0	382,243	42,218	3,727	0	45,945	6,270	434,458
Other	2,003	0	0	2,003	3,225	0	0	3,225	2,040	7,268		
Grand Totals		3,944,646	270,707	3,076	4,218,429	326,120	42,287	0	368,407	119,012	4,705,848	

Note: Export figures for December 2017 do not include data from one JAMA member manufacturer.

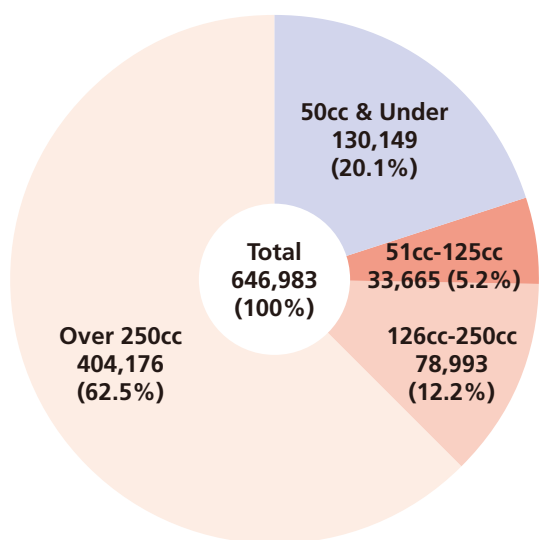
Source: Japan Automobile Manufacturers Association

Motorcycle Production Expands for Second Consecutive Year

Overall domestic motorcycle production in 2017 rose 15.4% over the previous year to 647,000 units. Class 1 motor-driven cycles (50cc and under) surged 30.9% to 130,000 units, Class 2 motor-driven cycles (51cc to 125cc) grew 7.0% to 34,000 units, mini-sized motorcycles (126cc to 250cc) rose 7.9% to 79,000 units, and small-sized motorcycles (over 250cc) increased 13.4% to 404,000 units. The combined total for larger motorcycles (all those over 50cc) climbed 12.1% to 517,000 units.

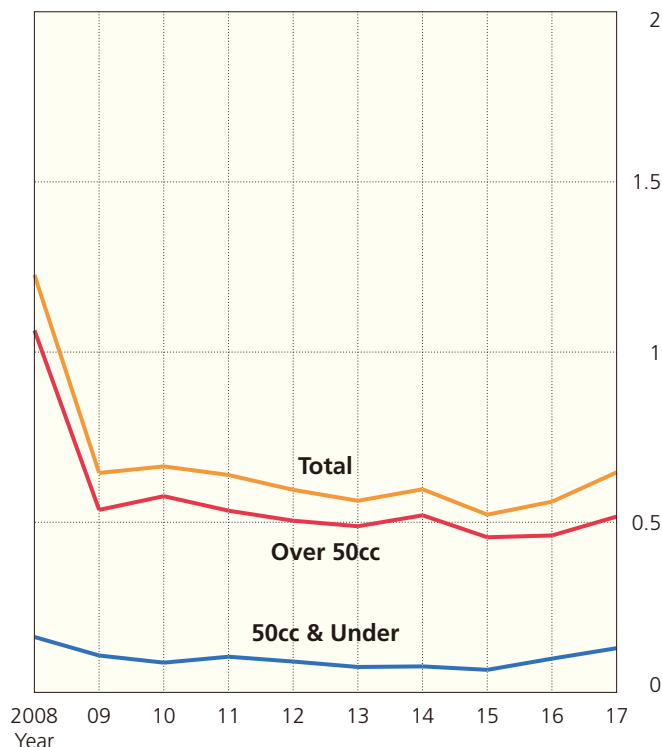
MOTORCYCLE PRODUCTION BY ENGINE CAPACITY IN 2017

In vehicle units



TRENDS IN MOTORCYCLE PRODUCTION

x 1 million units



MOTORCYCLE PRODUCTION

In vehicle units

Year	Motor-Driven Cycles Class 1 (50cc & Under)	Over 50cc				Subtotal	Total	Chg. (%)
		Motor-Driven Cycles Class 2 (51cc-125cc)	Mini-Sized Motorcycles (126cc-250cc)	Small-Sized Motorcycles (Over 250cc)				
1970	895,599	1,407,205	259,145	385,723	2,052,073	2,947,672	114.4	
1975	1,030,822	1,887,701	331,733	552,291	2,771,725	3,802,547	84.3	
1980	2,493,910	2,181,206	660,831	1,098,577	3,940,614	6,434,524	143.8	
1985	2,014,850	1,373,423	469,728	678,346	2,521,497	4,536,347	112.7	
1990	1,343,220	686,734	270,304	506,637	1,463,675	2,806,895	100.4	
1995	951,803	1,038,938	217,738	544,760	1,801,436	2,753,239	101.0	
2000	636,546	630,221	297,433	851,191	1,778,845	2,415,391	107.3	
2005	298,549	260,343	279,274	953,419	1,493,036	1,791,585	103.0	
2008	162,928	128,381	192,863	742,667	1,063,911	1,226,839	73.2	
2009	108,417	57,424	125,384	353,676	536,484	644,901	52.6	
2010	87,513	80,630	108,950	387,082	576,662	664,175	103.0	
2011	104,936	64,507	104,636	365,108	534,251	639,187	96.2	
2012	90,886	39,569	91,925	373,093	504,587	595,473	93.2	
2013	74,940	27,670	88,108	372,591	488,369	563,309	94.6	
2014	76,569	31,529	93,536	395,424	520,489	597,058	106.0	
2015	66,438	30,886	76,945	348,125	455,956	522,394	87.5	
2016	99,319	31,465	73,194	356,558	461,217	560,536	107.3	
2017	130,149	33,665	78,993	404,176	516,834	646,983	115.4	

Notes: 1. KD sets have been excluded since 1979; they represent less than 60% of the cost of compositional components per vehicle and have been treated as components since 1988. 2. "Chg. (%)" means change from the previous year (with the previous year's result indexed at 100).

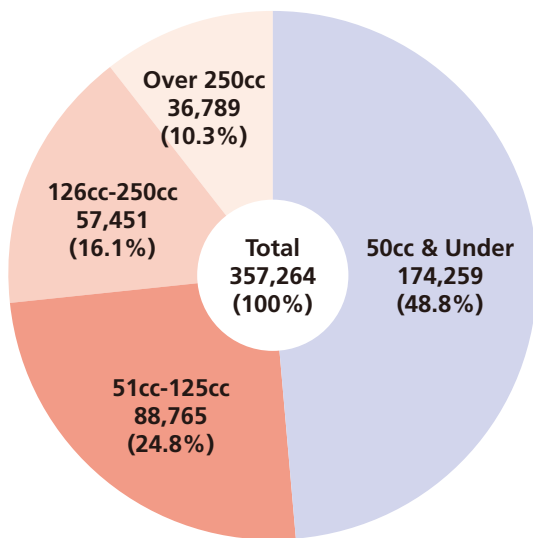
Source: Japan Automobile Manufacturers Association

Motorcycle Sales Show First Increase in 4 Years

Domestic motorcycle sales (defined here as ex-factory shipments to domestic dealers, not as new registrations) in 2017 totalled 357,000 units, up 5.7% from the previous year. By engine capacity, whereas sales of Class 2 motor-driven cycles (51cc to 125cc) decreased 12.5% to 89,000 units, sales of Class 1 motor-driven cycles (50cc and under), mini-sized motorcycles (126cc to 250cc), and small-sized motorcycles (over 250cc) increased 7.5% to 174,000 units, 42.3% to 57,000 units, and 7.5% to 37,000 units, respectively. Overall sales of motorcycles with engine capacity over 50cc totalled 183,000 units, an increase of 4.0% over 2016.

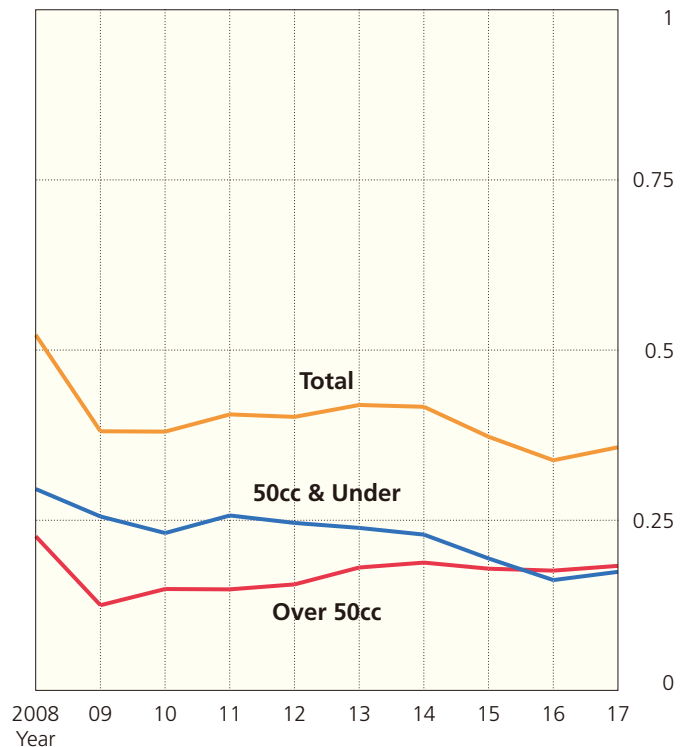
MOTORCYCLE SALES BY ENGINE CAPACITY IN 2017

In vehicle units



TRENDS IN MOTORCYCLE SALES

x 1 million units



MOTORCYCLE SALES (SHIPMENTS TO DOMESTIC DEALERS)

In vehicle units

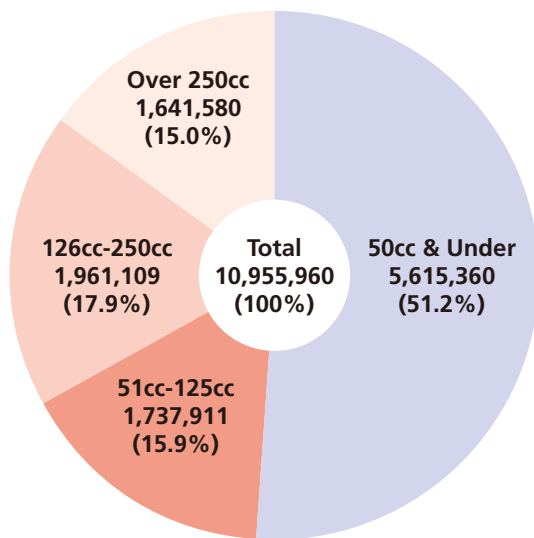
Year	Motor-Driven Cycles Class 1 (50cc & Under)	Over 50cc				Subtotal	Total	Chg. (%)
		Motor-Driven Cycles Class 2 (51cc-125cc)	Mini-Sized Motorcycles (126cc-250cc)	Small-Sized Motorcycles (Over 250cc)				
1980	1,978,426	200,238	88,188	103,184	391,610	2,370,036	122.7	
1985	1,646,115	130,574	173,887	145,674	450,135	2,096,250	102.6	
1990	1,213,512	169,618	158,882	76,921	405,421	1,618,933	97.6	
1995	884,718	138,115	98,833	91,186	328,134	1,212,852	101.6	
2000	558,459	102,116	72,886	46,416	221,418	779,877	93.2	
2005	470,922	88,747	99,658	47,186	235,591	706,513	100.9	
2008	295,908	120,990	55,674	49,743	226,407	522,315	76.3	
2009	255,561	65,888	37,180	22,148	125,216	380,777	72.9	
2010	231,247	96,368	27,275	25,352	148,995	380,242	99.9	
2011	257,045	95,702	31,767	21,019	148,488	405,533	106.7	
2012	246,095	90,291	39,707	25,802	155,800	401,895	99.1	
2013	238,786	100,947	47,788	31,877	180,612	419,398	104.4	
2014	228,918	96,249	53,072	38,484	187,805	416,723	99.4	
2015	193,842	94,851	48,515	35,488	178,854	372,696	89.4	
2016	162,130	101,424	40,383	34,211	176,018	338,148	90.7	
2017	174,259	88,765	57,451	36,789	183,005	357,264	105.7	

Note: "Chg. (%)" means change from the previous year (with the previous year's result indexed at 100).

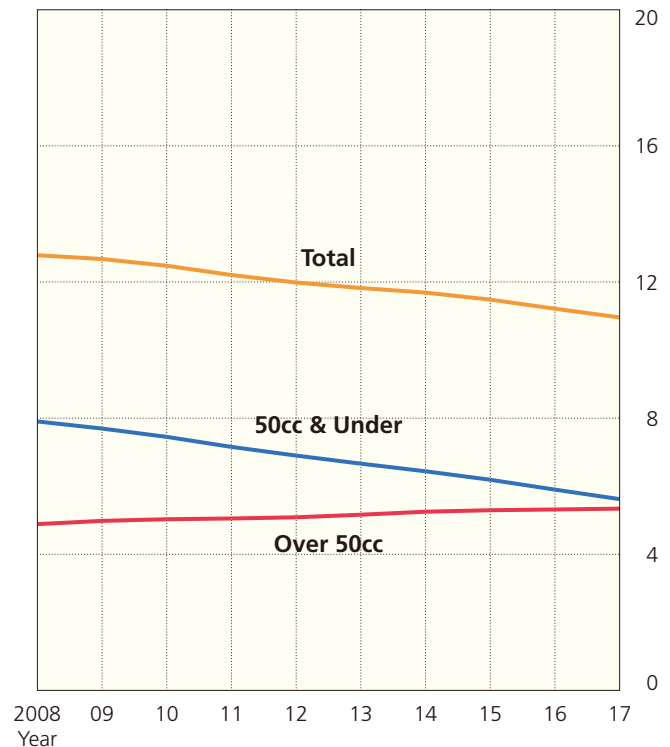
11 Million Motorcycles in Use

At March 31, 2017, motorcycles in use in Japan totalled 10.96 million units, down 2.3% from the previous year. By engine capacity, Class 1 motor-driven cycles, accounting for 51.2% of all motorcycles in use, dropped 4.8% to 5.62 million units and mini-sized motorcycles slipped 0.5% to 1.96 million units in 2017, whereas Class 2 motor-driven cycles and small-sized motorcycles in use rose 1.2% and 0.8%, to 1.74 million and 1.64 million units respectively. Thus, motorcycles over 50cc in use increased 0.5%, to a total of 5.34 million units.

MOTORCYCLES IN USE BY ENGINE CAPACITY (at March 31, 2017) In vehicle units



TRENDS IN MOTORCYCLES IN USE (at March 31 yearly) x 1 million units



MOTORCYCLES IN USE (at March 31 yearly) In vehicle units

Year	Motor-Driven Cycles Class 1 (50cc & Under)	Over 50cc				Subtotal	Total	Chg. (%)
		Motor-Driven Cycles Class 2 (51cc-125cc)	Mini-Sized Motorcycles (126cc-250cc)	Small-Sized Motorcycles (Over 250cc)				
1970	3,727,426	4,431,745	583,316	109,771	5,124,832	8,852,258	100.5	
1975	4,851,140	3,132,818	492,307	276,715	3,901,840	8,752,980	101.9	
1980	8,794,335	2,281,006	506,567	383,639	3,171,212	11,965,547	109.8	
1985	14,609,399	1,747,957	1,047,426	775,627	3,571,010	18,180,409	104.8	
1990	13,539,269	1,517,228	1,669,771	1,045,519	4,232,518	17,771,787	97.6	
1995	11,165,390	1,421,031	1,823,446	1,177,229	4,421,706	15,587,096	98.0	
2000	9,643,487	1,337,395	1,704,522	1,288,399	4,330,316	13,973,803	98.0	
2005	8,566,613	1,353,732	1,857,439	1,397,392	4,608,563	13,175,176	99.3	
2008	7,902,051	1,429,738	1,976,829	1,478,724	4,885,291	12,787,342	98.9	
2009	7,694,009	1,479,588	1,996,311	1,505,304	4,981,203	12,675,212	99.1	
2010	7,448,862	1,511,440	1,992,939	1,524,176	5,028,555	12,477,417	98.4	
2011	7,154,455	1,540,667	1,975,623	1,535,181	5,051,471	12,205,926	97.8	
2012	6,899,459	1,582,925	1,959,845	1,542,856	5,085,626	11,985,085	98.2	
2013	6,661,807	1,626,094	1,969,187	1,566,341	5,161,622	11,823,429	98.7	
2014	6,438,002	1,674,884	1,980,411	1,595,335	5,250,630	11,688,632	98.9	
2015	6,188,710	1,704,083	1,978,462	1,611,089	5,293,634	11,482,344	98.2	
2016	5,899,276	1,717,092	1,970,471	1,628,461	5,316,024	11,215,300	97.7	
2017	5,615,360	1,737,911	1,961,109	1,641,580	5,340,600	10,955,960	97.7	

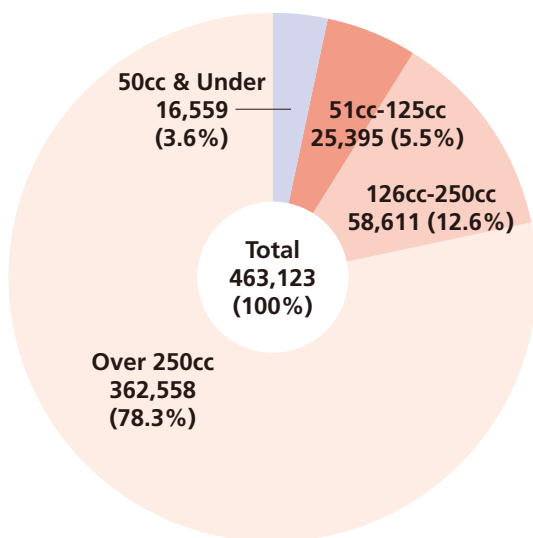
Notes: 1. Motor-driven cycle data is as at April 1, and since 2006 motorcycles with engine capacity of 125cc and under whose owners fail to pay the mandatory motorcycle ownership tax are not included in this data. 2. "Chg. (%)" means change from the previous year (with the previous year's result indexed at 100).
Sources: Ministry of Land, Infrastructure, Transport and Tourism; since 2006 (only for the 125cc-and-under categories), Ministry of Internal Affairs and Communications

Motorcycle Exports Post Second Straight Year of Growth

Motorcycle exports in 2017 grew 8.1% from the previous year to 463,000 units. By engine capacity, exports of Class 1 motor-driven cycles rose 3.3% to 17,000 units and small-sized motorcycles climbed 12.4% to 363,000 units, whereas Class 2 motor-driven cycles and mini-sized motorcycles fell 15.9% and 2.0%, to 25,000 units and 59,000 units respectively.

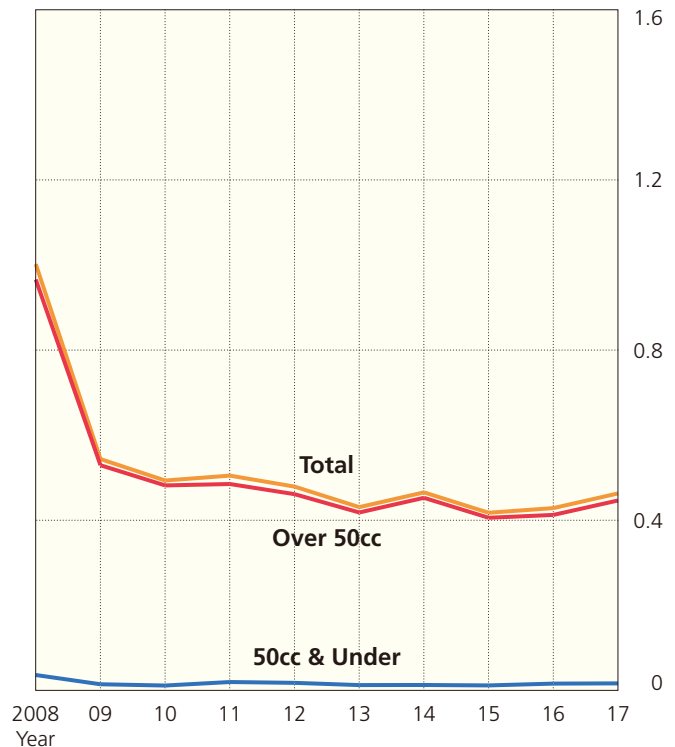
MOTORCYCLE EXPORTS BY ENGINE CAPACITY IN 2017

In vehicle units



TRENDS IN MOTORCYCLE EXPORTS

x 1 million units



MOTORCYCLE EXPORTS

In vehicle units

Year	Motor-Driven Cycles Class 1 (50cc & Under)	Over 50cc				Subtotal	Total	Chg. (%)
		Motor-Driven Cycles Class 2 (51cc-125cc)	Mini-Sized Motorcycles (126cc-250cc)	Small-Sized Motorcycles (Over 250cc)				
1970	326,815	914,325	187,185	309,277	1,410,787	1,737,602	133.8	
1975	288,843	1,546,170	328,313	527,344	2,401,827	2,690,670	83.0	
1980	501,027	1,907,481	548,306	972,226	3,428,013	3,929,040	144.0	
1985	369,167	1,350,412	296,865	525,038	2,172,315	2,541,482	119.7	
1990	147,301	507,840	117,222	411,381	1,036,443	1,183,744	107.3	
1995	61,627	691,433	129,961	442,689	1,264,083	1,325,710	94.2	
2000	82,038	549,040	204,591	805,508	1,559,139	1,641,177	116.1	
2005	57,860	197,378	177,824	899,161	1,274,363	1,332,223	100.4	
2008	36,234	95,114	149,530	721,309	965,953	1,002,187	81.3	
2009	14,493	44,708	101,298	383,380	529,386	543,879	54.3	
2010	11,522	48,976	85,506	347,460	481,942	493,464	90.7	
2011	19,745	45,853	83,594	355,793	485,240	504,985	102.3	
2012	17,794	35,579	69,963	355,827	461,369	479,163	94.9	
2013	12,560	27,676	64,566	326,095	418,337	430,897	89.9	
2014	12,778	29,771	63,891	359,144	452,806	465,584	108.0	
2015	11,761	30,823	59,851	315,214	405,888	417,649	89.7	
2016	16,031	30,181	59,805	322,602	412,588	428,619	102.6	
2017	16,559	25,395	58,611	362,558	446,564	463,123	108.1	

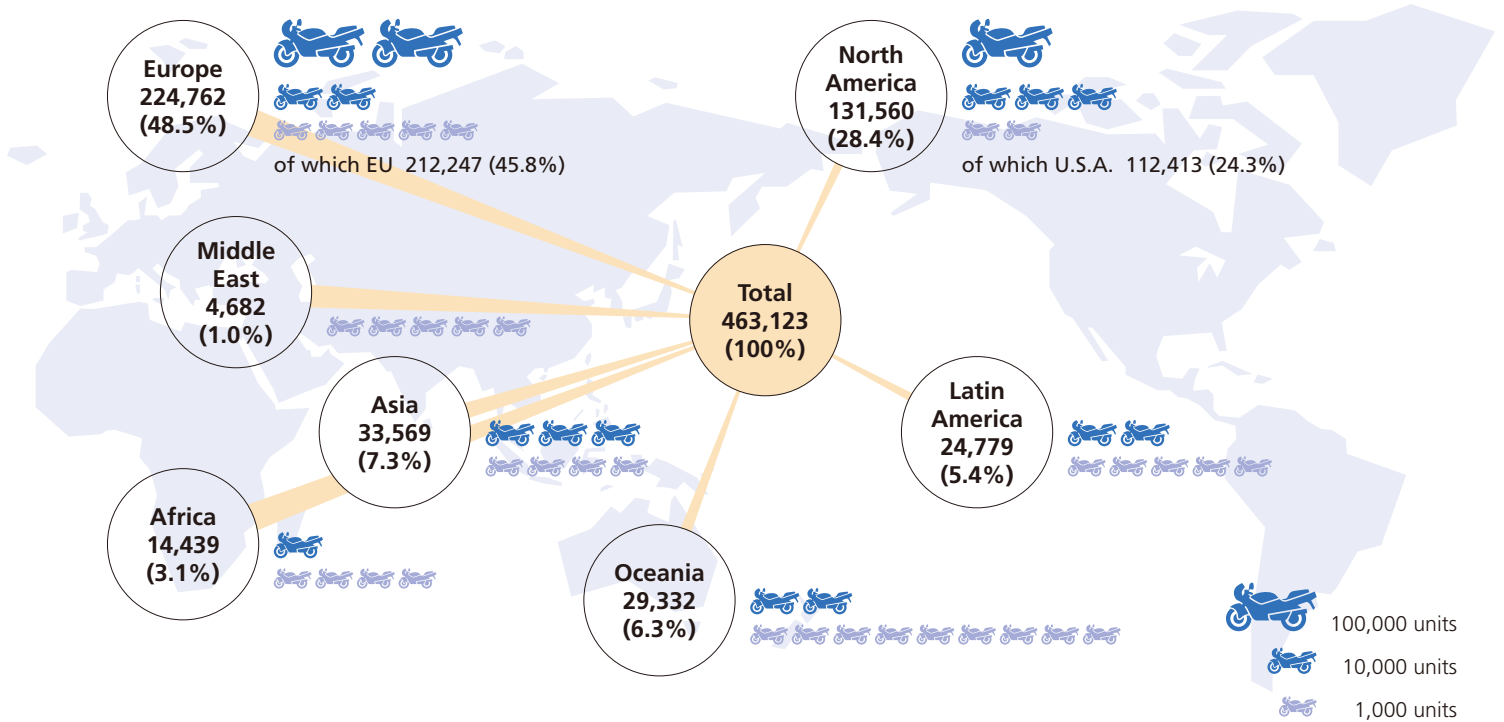
Notes: 1. Figures represent ex-factory export shipments of motorcycles manufactured in Japan. 2. Class 2 motor-driven cycles include three-wheeled motor-driven cycles. 3. KD sets have been excluded since 1979; they represent less than 60% of the cost of compositional components per vehicle and have been treated as components since 1988. 4. "Chg. (%)" means change from the previous year (with the previous year's result indexed at 100).
Source: Japan Automobile Manufacturers Association

An Increase in Motorcycle Exports to Latin America, Asia, Europe, and North America

Compared to the previous year, motorcycle exports in 2017 climbed to Latin America (25,000 units), Asia (34,000 units), Europe (225,000 units), and North America (132,000 units), but declined to the Middle East (5,000 units), Africa (14,000 units), and Oceania (29,000 units).

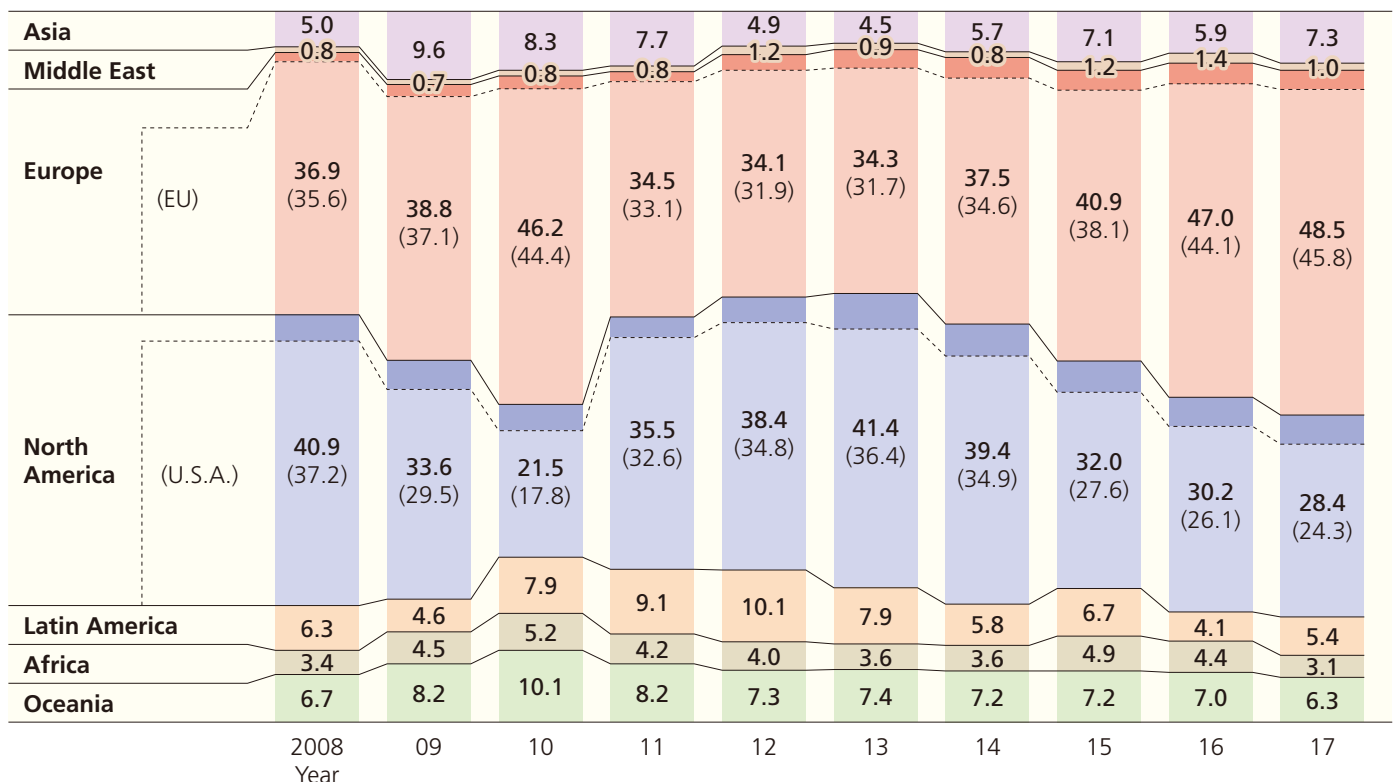
MOTORCYCLE EXPORTS BY DESTINATION IN 2017

In vehicle units



MOTORCYCLE EXPORT TRENDS BY DESTINATION

In %



MOTORCYCLE EXPORTS BY DESTINATION & BY ENGINE CAPACITY IN 2017

In vehicle units

Destination		Motor-Driven Cycles Class 1 (50cc & Under)	Over 50cc				Total	
			Motor-Driven Cycles Class 2 (51cc-125cc)	Mini-Sized Motorcycles (126cc-250cc)	Small-Sized Motorcycles (Over 250cc)	Subtotal		
Asia	South Korea	9	6	4	3,493	3,503	3,512	
	China	0	0	0	759	759	759	
	Taiwan	0	953	0	4,445	5,398	5,398	
	Hong Kong	30	15	136	2,425	2,576	2,606	
	Thailand	0	30	618	6,828	7,476	7,476	
	Singapore	0	166	140	2,353	2,659	2,659	
	Malaysia	3	11	14	2,610	2,635	2,638	
	Philippines	39	0	146	1,340	1,486	1,525	
	Indonesia	0	278	5,438	172	5,888	5,888	
	Other	39	10	350	709	1,069	1,108	
Subtotal		120	1,469	6,846	25,134	33,449	33,569	
Middle East	Saudi Arabia	21	44	8	325	377	398	
	Israel	0	66	131	2,593	2,790	2,790	
	United Arab Emirates	33	20	202	367	589	622	
	Other	3	13	41	815	869	872	
Subtotal		57	143	382	4,100	4,625	4,682	
Europe	Sweden	0	2	229	1,291	1,522	1,522	
	Denmark	0	0	63	680	743	743	
	UK	0	0	590	10,205	10,795	10,795	
	Netherlands	0	871	2,423	27,569	30,863	30,863	
	Belgium	0	0	148	1,520	1,668	1,668	
	France	1,437	2,190	2,042	56,009	60,241	61,678	
	Germany	555	591	1,244	36,364	38,199	38,754	
	Portugal	0	0	31	2,192	2,223	2,223	
	Spain	288	98	239	16,961	17,298	17,586	
	Italy	147	218	1,244	36,303	37,765	37,912	
	Poland	0	0	60	733	793	793	
	Austria	0	0	45	596	641	641	
	Hungary	0	17	70	1,560	1,647	1,647	
	Greece	36	16	25	1,706	1,747	1,783	
	Slovenia	66	40	98	1,162	1,300	1,366	
	Czech Republic	0	0	10	1,014	1,024	1,024	
	Other	0	20	247	982	1,249	1,249	
	Subtotal		2,529	4,063	8,808	196,847	209,718	212,247
	Norway	0	0	36	738	774	774	
	Switzerland	42	50	261	7,183	7,494	7,536	
Turkey	72	28	10	3,058	3,096	3,168		
Russia	0	8	32	873	913	913		
Other	0	0	0	124	124	124		
Subtotal		2,643	4,149	9,147	208,823	222,119	224,762	
North America	Canada	1,301	1,561	3,423	12,862	17,846	19,147	
	U.S.A.	9,520	8,265	20,266	74,362	102,893	112,413	
Subtotal		10,821	9,826	23,689	87,224	120,739	131,560	
Latin America	Mexico	99	40	413	2,381	2,834	2,933	
	Guatemala	6	18	743	187	948	954	
	Panama	0	0	148	261	409	409	
	Colombia	0	80	1,353	3,029	4,462	4,462	
	Peru	60	20	98	148	266	326	
	Chile	81	145	467	1,149	1,761	1,842	
	Brazil	0	6	100	6,658	6,764	6,764	
	Argentina	45	264	823	4,053	5,140	5,185	
	Other	61	94	822	927	1,843	1,904	
Subtotal		352	667	4,967	18,793	24,427	24,779	
Africa	Guinea	0	86	262	0	348	348	
	Togo	0	756	643	0	1,399	1,399	
	Mali	0	906	1,100	3	2,009	2,009	
	Niger	0	460	869	0	1,329	1,329	
	Dem Rep Congo	0	1,112	80	0	1,192	1,192	
	Ethiopia	0	0	1,598	9	1,607	1,607	
	Kenya	0	164	182	0	346	346	
	Uganda	0	600	20	1	621	621	
	South Africa	39	197	896	1,603	2,696	2,735	
	Other	12	1,289	593	959	2,841	2,853	
Subtotal		51	5,570	6,243	2,575	14,388	14,439	
Oceania	Australia	2,028	2,541	5,481	14,066	22,088	24,116	
	New Zealand	475	997	1,683	1,677	4,357	4,832	
	Other	12	33	173	166	372	384	
Subtotal		2,515	3,571	7,337	15,909	26,817	29,332	
Grand Totals		16,559	25,395	58,611	362,558	446,564	463,123	

Source: Japan Automobile Manufacturers Association

Japan's 10th Basic Plan for Road Safety

Japan's road safety measures are promoted on the basis of its succession of consecutive "basic plans" for road safety, the first of which was implemented in 1971. The provisions of the tenth national road safety plan (2016-2020) are premised on the ultimate goal of eliminating road accidents altogether and were formulated on the basis of three guiding principles, namely: 1) the overarching priority of protecting human life, with a particular emphasis on promoting road safety for children, the elderly, and the disabled; 2) the application of advanced technologies to improve road safety; and 3) the promotion of research activity and technological innovation targeting greater road safety.

● JAPAN'S ROAD SAFETY TARGETS

- To reduce the annual number of road fatalities to 2,500 or fewer by 2020, and thus to make Japan's roads the safest in the world.
- To reduce the annual number of road injuries (including fatalities for deaths occurring within 24 hours of accident) to 500,000 or fewer by 2020.

JAMA Initiatives in Promoting Greater Road Safety

Road safety involves three factors—road users, road infrastructure, and vehicles. Accordingly, those three factors are the focus of JAMA's and its member manufacturers' road safety activities. While the automakers' vehicle-related measures for increased active and passive safety are detailed elsewhere (see page 28), JAMA's activities targeting greater road safety awareness among road users as well as improvements in road infrastructure are summarized here. JAMA regularly submits to Japan's relevant authorities recommendations on road infrastructure-related measures for greater safety and convenience in road use.

● PROMOTING GREATER ROAD SAFETY AWARENESS

1. Through road safety promotional campaigns

Every year in spring and autumn, JAMA carries out its own road safety campaigns (whose launch dates are intended to coincide with the start of the central government's National Police Agency-conducted semi-annual traffic safety campaigns) which promote specific measures for increased road user safety, including the early use of headlamps at dusk, the appropriate use of high-beam headlamps, the secure fastening of motorcycle chinstraps, and the use of seatbelts by all vehicle occupants including rear-seat occupants.

2. Through hands-on driver education programs

Together with the Japan Automobile Federation and the Japan Traffic Safety Association, JAMA conducts the "Safe Driving Training Program," featuring hands-on training sessions to heighten drivers' awareness of safe driving practices, and the "Senior Drivers' School Program," focusing on its elderly participants' driving habits to raise their awareness of the impacts of aging-related physical changes on driving practices. To gain experience with advanced safety features, participants in both programs also drive vehicles equipped with such features.

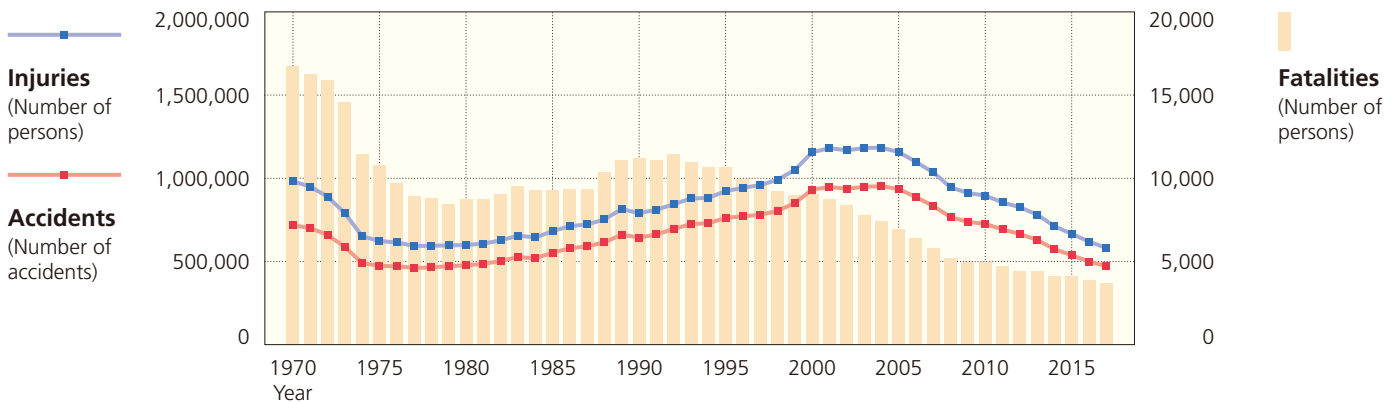
3. Through original road safety educational materials targeting elderly drivers

JAMA has developed study materials for a refresher course for elderly drivers in which issues related to safe driving are examined and information and tips on safe driving practices are provided, to promote their continued enjoyment of automobile use and its benefits. JAMA also provides a training course for instructors who utilize these materials.

Road Fatality Total Lowest Ever on Record; Road Accidents and Resulting Injuries Drop for Thirteenth Straight Year

In 2017 road fatalities (defined here as deaths occurring within 24 hours after accident) in Japan dropped to 3,694, the lowest level recorded since the start of road fatality data compilation in 1948 by the National Police Agency. Road accidents and road injuries also declined, for the thirteenth consecutive year, to 472,165 and 580,847 respectively. Seatbelt use is a major contributing factor to reduced fatalities and reduced injuries in road traffic accidents. The June 2008 revision to the Road Traffic Act requires all automobile occupants, including rear-seat occupants, to use seatbelts. Although the rate of use of rear seatbelts in 2017 stood at 36.4% on regular roads and at 74.4% on expressways, those rates remain low compared to the rate of use of front seatbelts, which approaches 100%. Further measures are needed to encourage rear-seat occupants to buckle up.

ROAD ACCIDENTS/INJURIES/FATALITIES

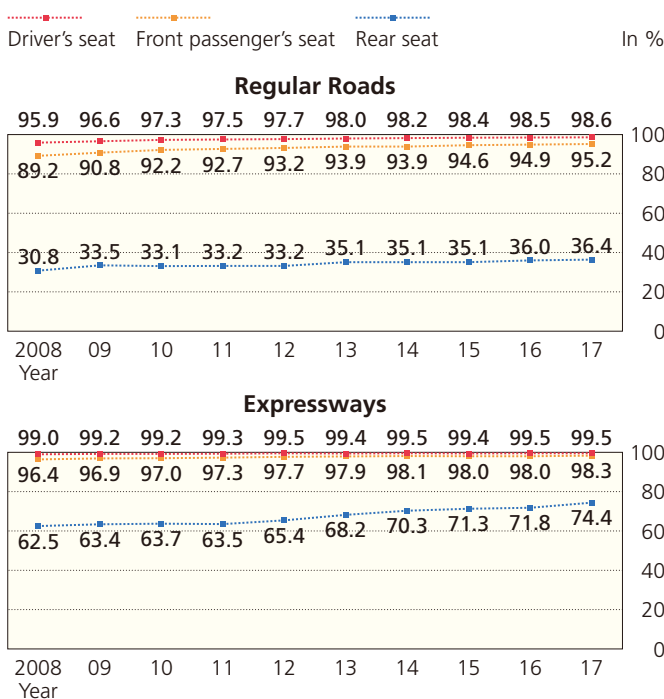


ROAD ACCIDENTS/INJURIES/FATALITIES (exact figures)

Year	1970	1975	1980	1985	1990	1995	2000	2005	2010	2013	2014	2015	2016	2017
Accidents	718,080	472,938	476,677	552,788	643,097	761,794	931,950	934,346	725,924	629,033	573,842	536,899	499,201	472,165
Injuries (Number of persons)	981,096	622,467	598,719	681,346	790,295	922,677	1,155,707	1,157,113	896,297	781,492	711,374	666,023	618,853	580,847
Fatalities (Number of persons)	16,765	10,792	8,760	9,261	11,227	10,684	9,073	6,937	4,948	4,388	4,113	4,117	3,904	3,694

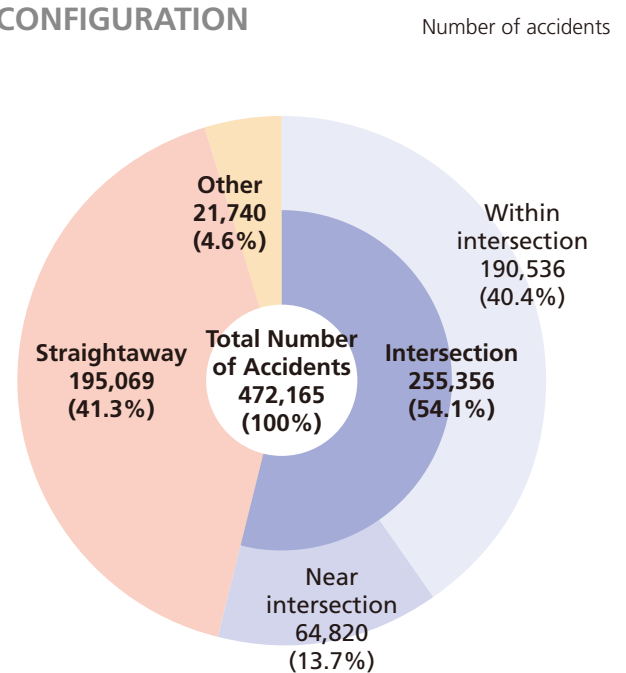
Source: National Police Agency

SEATBELT USE RATES BY SEAT POSITION



Notes: 1. The survey on seatbelt use is conducted annually in October. 2. 2017 survey samples totalled roughly 407,000 on regular roads and 88,000 on expressways.
Sources: National Police Agency; Japan Automobile Federation

ROAD ACCIDENTS IN 2017 BY ROAD CONFIGURATION



Notes: 1. "Straightaway" includes some curves and tunnels. 2. "Other" includes railroad crossings.
Source: National Police Agency

Wider ITS Applications and Advanced Safety Vehicle Technologies

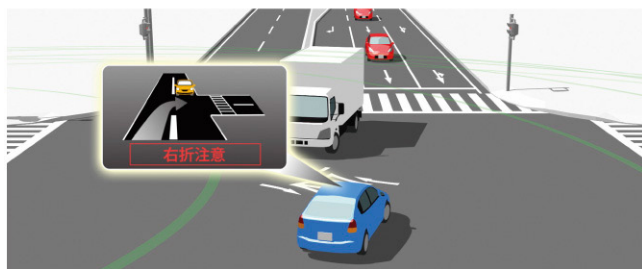
Intelligent Transport Systems aim to radically improve transport safety, efficiency and convenience through the use of information and communication technologies integrating road users, road infrastructure, and vehicles. In 1996 the Japanese government formulated its Comprehensive Concept for the Promotion of ITS, on the basis of which it has promoted, as a national project, ITS development in a number of areas. Advanced navigation systems are already widely in use, as are ETC (electronic toll collection) and smart highway toll stations using ETC exclusively. A wide range of technologies developed on the basis of Advanced Safety Vehicle (ASV) research are also in application. The Public-Private ITS Initiative/Roadmaps policy initiative formulated by the Japanese government in June 2014 (and updated in May 2017) details measures to be taken for further ITS development under public-private cooperative efforts, with the focus on ITS and automated driving systems development, data utilization strategies to facilitate automated driving, and expanded use of road traffic data. To achieve the stipulated goals, coordinated interministerial and inter-agency efforts, including the upgrading of communication infrastructures, are required.

INTRODUCTION OF ROAD-TO-VEHICLE DRIVING SAFETY SUPPORT SYSTEMS (“DSSS”)

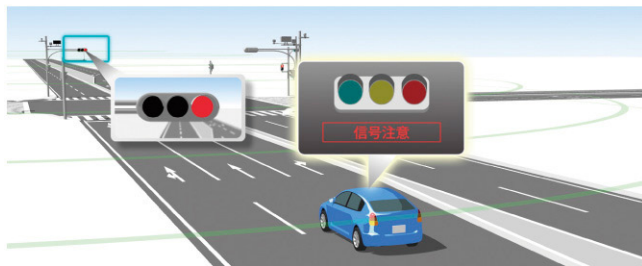
Incorporating ITS technologies, road-to-vehicle systems providing driving safety support and cruise assistance have been in operation in Japan since 2010-11. More recently, ETC 2.0, an advanced electronic toll collection system that also provides drivers with real-time information on traffic conditions, has been introduced, for use on intercity and intracity expressways.

● “DSSS” SYSTEM FEATURES (EXAMPLES)

1. “Oncoming traffic” warning (here, on right turn)



2. Signal recognition enhancement system



Source: Universal Traffic Management Society of Japan

● ETC 2.0 DEVICE-BASED SYSTEM FEATURES (EXAMPLES)



Sources: Ministry of Land, Infrastructure, Transport and Tourism, etc.

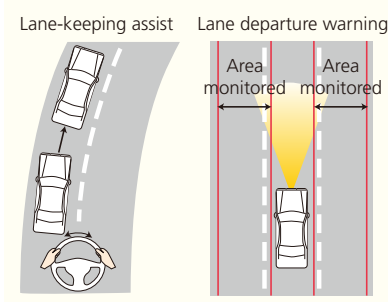
EXPANDING AVAILABILITY OF ASV TECHNOLOGIES IN THE MARKET

In the area of safe-driving assistance using ITS technologies, a wide range of vehicle safety features, including adaptive front-lighting systems, lane-keeping assist systems, full-range adaptive cruise control systems and collision-mitigation braking systems, have been developed based on the results of research conducted on the Advanced Safety Vehicle (ASV) concept. Most of these advanced technologies have already been introduced to the market (see page 28 for details on the status of their onboard installation).

● PRACTICAL APPLICATION OF ASV TECHNOLOGIES

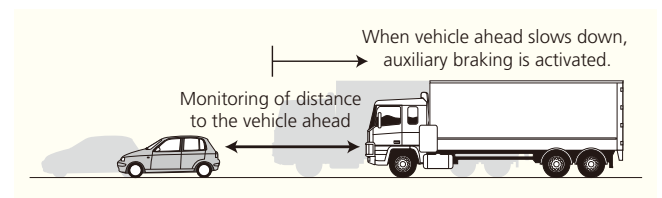
1. Lane-Keeping Assist

Sensors (cameras) positioned on the vehicle monitor the road ahead and, through auxiliary control of the steering wheel, help keep the vehicle centered in the lane whenever the vehicle deviates from its course because of, for example, a crosswind or road surface unevenness.



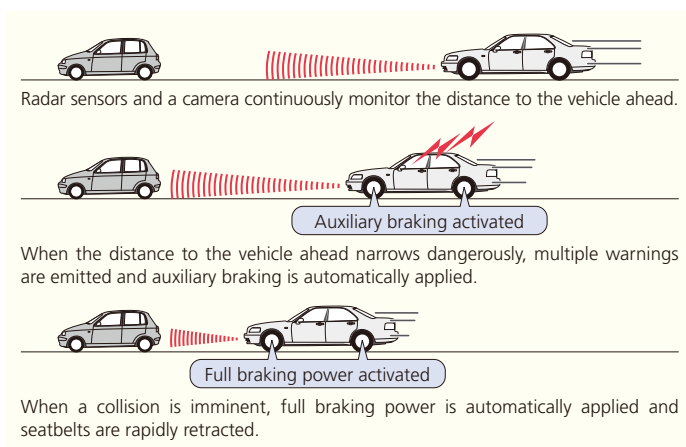
2. Full-Range Adaptive Cruise Control

Information from front sensors helps a vehicle keep a safe distance from the vehicle ahead through brake or speed control according to a preset vehicle speed.



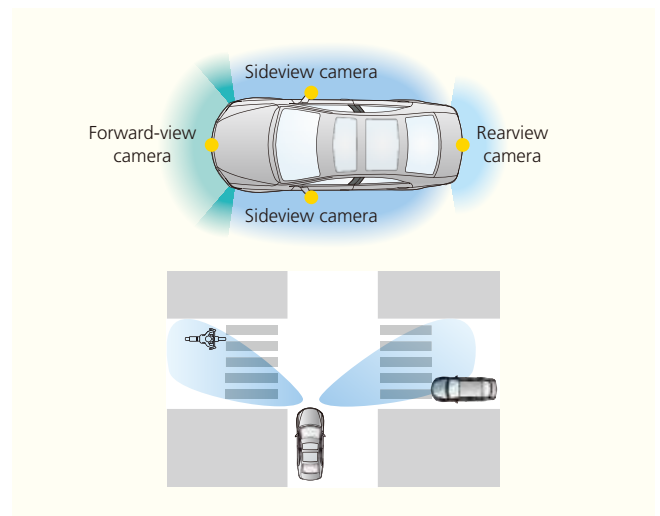
3. Collision-Mitigation Braking System (pre-crash safety)

Based on the distance from and speed relative to the vehicle ahead obtained principally by means of radar technology, the system's electronic control unit calculates the risk of collision. In the event of such a risk, multiple warnings are emitted and auxiliary braking is applied. When a collision is imminent, full braking power is applied and seatbelts are retracted automatically.



4. Vehicle Perimeter Monitoring & Blind-Corner Monitoring












In blind-corner monitoring (bottom image), front cameras with built-in prisms transmit both left and right views to the in-cabin display screen.



Promoting Public Awareness of "Safety Support Cars"

Japan's Ministry of Economy, Trade and Industry, Ministry of Land, Infrastructure, Transport and Tourism, National Police Agency and Financial Services Agency, as well as automobile-related organizations, have been working cooperatively to promote the widespread use of "safety support cars" (or "sapocars" for short) equipped with advanced safety features such as automatic braking to help drivers of all ages avoid road accident occurrence and to mitigate damage/injury when accidents do occur. In line with this effort, Japan's automakers have upgraded advanced safety technologies and expanded their onboard installation rates, and aim to offer automatic braking and accelerator suppression for pedal misapplication as standard or optional equipment in all new-model passenger cars by 2020. Meanwhile, they are actively providing opportunities for test-driving "safety support cars" in order to raise public awareness of them.

● THE "SAFETY SUPPORT CAR" Ver 1.0 CONCEPT

Safety Support Car (or "Sapocar")	Safety Support Car S (or "Sapocar S")							
 <p>Passenger cars equipped with automatic braking; suitable for all drivers</p>	 <p>Passenger cars equipped with automatic braking and accelerator suppression for pedal misapplication; suitable especially for elderly drivers</p>	<p>"Sapocar S" Classification The "Sapocar S" concept has three sub-classifications, based on the safety features installed.</p> <table border="1" data-bbox="783 1765 1473 2101"> <tr> <td data-bbox="783 1765 995 1877">  <p>Type: "Wide"</p> </td> <td data-bbox="995 1765 1473 1877"> Automatic braking (pedestrian collision avoidance) Accelerator suppression for pedal misapplication (1) Lane departure warning (2) Advanced headlamp control (3) </td> </tr> <tr> <td data-bbox="783 1877 995 1995">  <p>Type: "Basic +"</p> </td> <td data-bbox="995 1877 1473 1995"> Automatic braking (vehicle collision avoidance) Accelerator suppression for pedal misapplication (1) </td> </tr> <tr> <td data-bbox="783 1995 995 2101">  <p>Type: "Basic"</p> </td> <td data-bbox="995 1995 1473 2101"> Automatic braking (vehicle collision avoidance) for low-speed vehicle operation (4) Accelerator suppression for pedal misapplication (1) </td> </tr> </table>	 <p>Type: "Wide"</p>	Automatic braking (pedestrian collision avoidance) Accelerator suppression for pedal misapplication (1) Lane departure warning (2) Advanced headlamp control (3)	 <p>Type: "Basic +"</p>	Automatic braking (vehicle collision avoidance) Accelerator suppression for pedal misapplication (1)	 <p>Type: "Basic"</p>	Automatic braking (vehicle collision avoidance) for low-speed vehicle operation (4) Accelerator suppression for pedal misapplication (1)
 <p>Type: "Wide"</p>	Automatic braking (pedestrian collision avoidance) Accelerator suppression for pedal misapplication (1) Lane departure warning (2) Advanced headlamp control (3)							
 <p>Type: "Basic +"</p>	Automatic braking (vehicle collision avoidance) Accelerator suppression for pedal misapplication (1)							
 <p>Type: "Basic"</p>	Automatic braking (vehicle collision avoidance) for low-speed vehicle operation (4) Accelerator suppression for pedal misapplication (1)							

(1) In automatic-transmission vehicles only. (2) Including lane-keeping assist. (3) Automatic high-to-low-beam headlamp control, glare-free high beam headlamp control, or adaptive front-lighting system. (4) 30km/h or lower.

Equipping More Vehicles with Advanced Safety Features

The automotive industry continuously strives for greater *active* safety by upgrading vehicle safety equipment and expanding its onboard installation rates, to help prevent accident occurrence. For example, 66.2% of the totality of passenger cars produced in 2016 for the domestic market were equipped with forward collision-mitigation braking systems (including those for low-speed vehicle operation) and 47.1% with systems enabling accelerator suppression in the event of pedal misapplication. Automakers also continuously seek to increase *passive* safety through enhanced structural safety and vehicle features designed to mitigate injury when accidents do occur.

● SAFETY FEATURE ONBOARD INSTALLATION STATUS (for passenger cars produced in 2016 for home market)

	Safety Feature	Installation Status				
		In no. of models (1)		In % (2)	In vehicle units	
Active Safety	Brake assist	180	(180)	98.9	3,728,104	99.6
	Unfastened seatbelt warning (front passenger's seat)	116	(118)	63.7	2,723,376	72.7
	Power-window jamming prevention (with auto-up function)	180	(178)	98.9	3,737,031	99.8
	Power-window jamming prevention (without auto-up function)	29	(29)	15.9	656,388	17.5
	High-intensity discharge headlamps	165	(75)	90.7	2,241,571	59.9
	Adaptive front-lighting system (AFS)	29	(10)	15.9	101,752	2.7
	Backing-up monitoring (rear obstacle detection)	134	(30)	73.6	1,655,837	44.2
	Vehicle perimeter monitoring	53	(14)	29.1	437,093	11.7
	Vehicle perimeter obstacle warning	50	(8)	27.5	496,332	13.3
	Blind-corner monitoring	32	(5)	17.6	170,461	4.6
	Night vision monitoring	1	(0)	0.5	251	0.0
	Curve detection	21	(3)	11.5	218,159	5.8
	Tire pressure monitoring	18	(14)	9.9	91,918	2.5
	Driver inattention warning	45	(10)	24.7	615,074	16.4
	Inter-vehicle distance warning	101	(18)	55.5	1,968,965	52.6
	Lane departure warning	92	(18)	50.5	1,720,540	45.9
	Rear collision warning-equipped headrest control	3	(0)	1.6	984	0.0
	Forward collision-mitigation braking system	95	(18)	52.2	1,817,078	48.5
	Forward collision-mitigation braking system (for low-speed vehicle operation)	51	(16)	28.0	663,594	17.7
	Accelerator suppression for pedal misapplication	83	(13)	45.6	1,763,724	47.1
	Adaptive cruise control	55	(13)	30.2	521,510	13.9
	Adaptive cruise control with low-speed following mode	30	(9)	16.5	550,686	14.7
	Full-range adaptive cruise control	40	(12)	22.0	586,543	15.7
	Lane-keeping assist	38	(8)	20.9	588,355	15.7
	Backing-up monitoring (parking assistance)	17	(0)	9.3	80,028	2.1
	Navigator-based gearshift control	13	(1)	7.1	68,683	1.8
	Pre-crash seatbelts	15	(3)	8.2	14,874	0.4
	Electronic stability control	172	(164)	94.5	3,538,834	94.5
	Traction control with anti-lock braking system	153	(148)	84.1	3,125,525	83.5
	Navigator-based stop sign alert with brake assist	6	(3)	3.3	29,722	0.8
	Rearward-approaching-vehicle warning	32	(4)	17.6	367,567	9.8
	Emergency braking warning	116	(99)	63.7	3,001,628	80.2
Vehicle proximity warning (for HVs/EVs) (3)	50	(48)	45.9	925,829	46.4	
Automatic high-to-low-beam headlamp control	48	(9)	26.4	774,271	20.7	
Glare-free high beam headlamp control	15	(2)	8.2	96,161	2.6	
Backing-up monitoring (moving-object warning)	25	(2)	13.7	207,196	5.5	
Backing-up collision-mitigation braking system	3	(0)	1.6	23,093	0.6	
Vehicle perimeter-based collision-mitigation braking system (for low-speed operation)	16	(0)	8.8	360,127	9.6	
Rear collision-mitigation braking system	23	(0)	12.6	382,313	10.2	
Lane departure prevention	45	(9)	24.7	586,213	15.7	
Passive Safety	Side airbags	142	(71)	78.0	1,601,595	42.8
	Curtain airbags	139	(66)	76.4	1,347,884	36.0
	Active head restraints	131	(131)	72.0	3,031,137	80.9
	ISOFIX anchorages (for child safety seats)	177	(165)	97.3	3,710,988	99.1
	Three-point seatbelt for rear center seat (4)	135	(135)	88.2	2,443,337	88.8
	Automatic collision notification (ACN)	17	(12)	9.3	96,083	2.6
	Advanced automatic collision notification (AACN)	28	(8)	15.4	265,898	7.1
	Total			182		3,744,641

(1) "In no. of models" indicates the number of models in which the safety feature is installed as standard or optional equipment. Figures in parentheses indicate the number of models in which the safety feature is standard equipment. (2) "In %" means as a percentage of the total number of models/units produced. (3) In 2016 a total of 109 hybrid/electric car models (1,994,302 vehicle units) were produced. (4) In 2016 a total of 153 passenger car models (2,750,948 vehicle units) were produced, excluding mini and other passenger cars which are not eligible for rear seat inclusion.

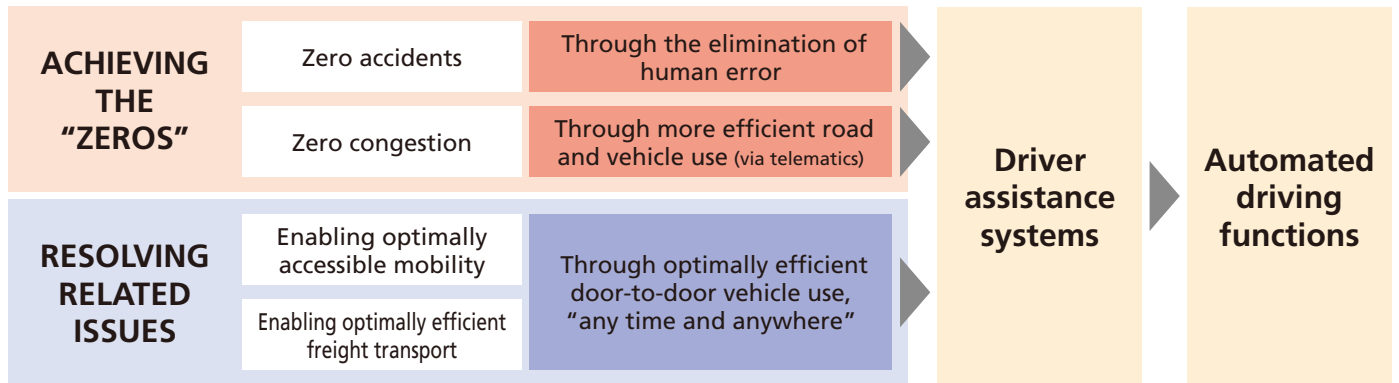
Notes: 1. Passenger cars here include minicars. 2. Criteria for inclusion in the calculations whose results are shown here were revised in 2015.

Source: Japan Automobile Manufacturers Association

The Transition to Automated Driving

JAMA'S VISION OF AUTOMATED DRIVING

In November 2015, JAMA released a roadmap for achieving safe and efficient road transport for all road users in Japan through the use of automated driving. Targeting the elimination of accidents and congestion and optimized road and vehicle use for people and the transport of goods, the roadmap envisions the wider introduction of automated driving functions in the lead-up to 2020; between 2020 and 2030, the expanded application of automated driving technologies in various driving environments; and by 2050, predicated on full public acceptance which Japan's automakers will promote, a comprehensive deployment of advanced levels of automated driving, the result of integrated efforts on the part of industry, government, and academia.



AUTOMATED DRIVING DEMONSTRATIONS IN TOKYO

In 2020 the Tokyo Olympic and Paralympic Games will attract worldwide attention to the city, providing an opportunity to demonstrate Japan's advanced technologies and model mobility systems as the world's safest, most comfortable, and most environment-friendly. To make full use of this opportunity, JAMA established its 2020 Preparation Committee in February 2017 and is working with the public and private sectors to organize and conduct, under Japan's "national strategic special zone" initiative, automated driving demonstrations in Tokyo.



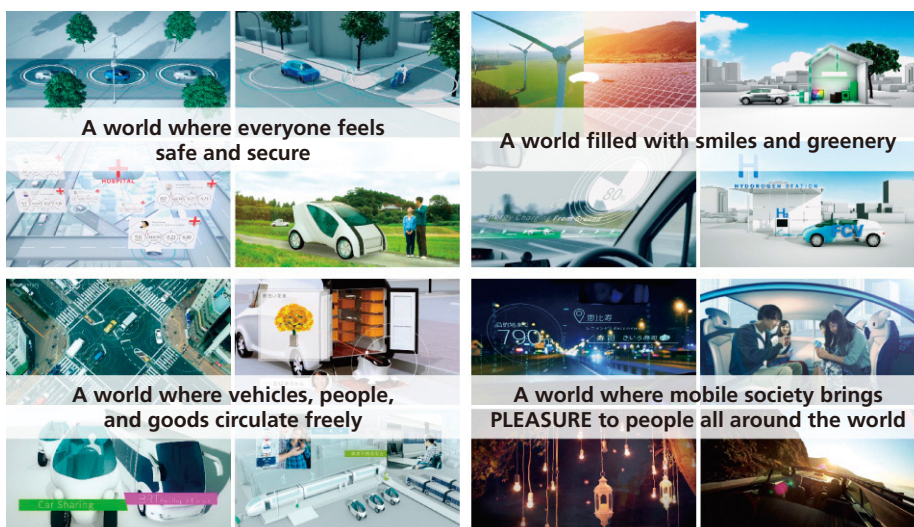
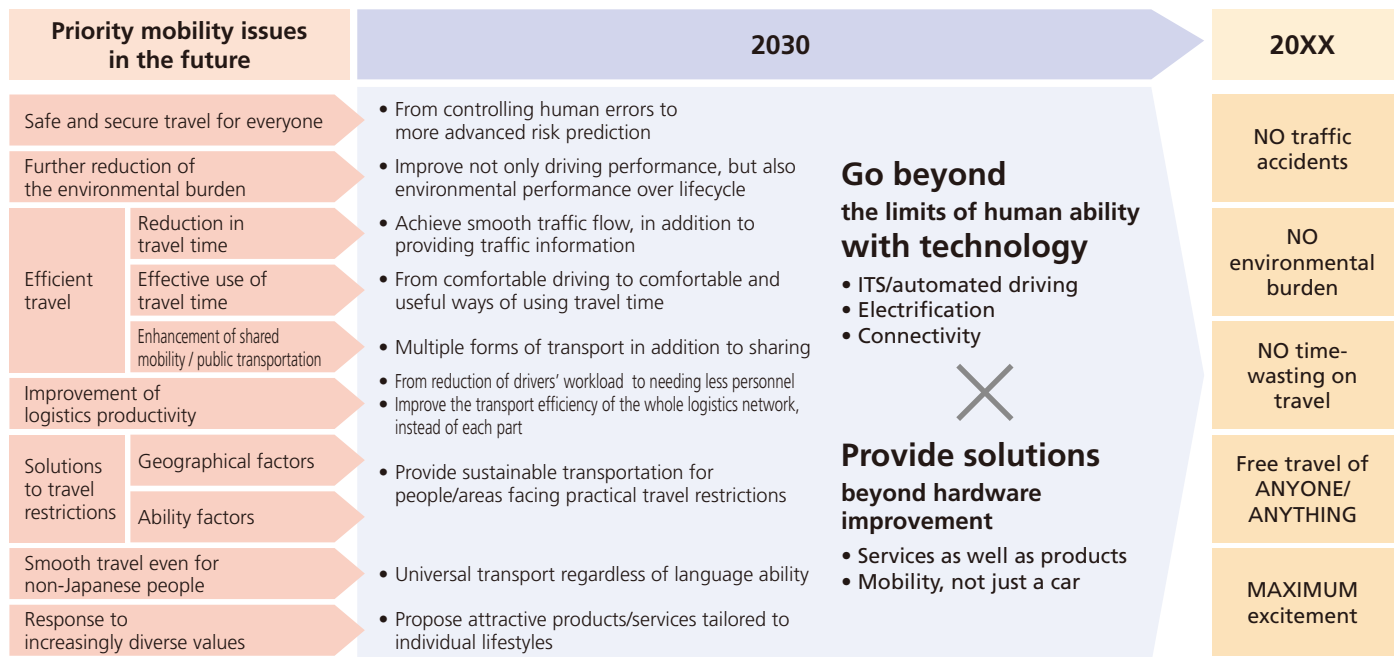
The “Mid- and Long-Term Mobility Vision” Formulated by JAMA

The 2020 Tokyo Olympic and Paralympic Games provide an excellent opportunity to promote collaboration among auto industry and other stakeholders to advance the development of automated driving and other new transportation technologies for the benefit of current and future generations. Accordingly, in February 2018 JAMA formulated its “Mid- and Long-Term Mobility Vision” which, establishing the year 2030 as a critical milestone in the evolution of mobility, emphasizes the need for a multisectoral approach to creating mobility’s future.

SUMMARY OF THE JAMA-FORMULATED MOBILITY VISION

1. Reaffirming the automobile’s role to date in enhancing people’s lives, the vision not only defines mobility’s multifaceted “universal mission” going forward, which includes improving safety in road transport, reducing its environmental burdens, optimizing its efficiency and accessibility, and creating emotional value, but also identifies priority mobility issues for the future.
2. Targeting the year 2030 as a critical milestone, the vision proposes solutions for those priority issues based on the use of automated driving systems, electrification, and connectivity technologies which exceed the limits of human ability.
3. The vision advocates the promotion of those solutions to expedite the achievement of zero accidents, zero environmental burdens, optimal efficiency and accessibility in road transport, and the full enjoyment of mobility by road users.
4. The vision presents a plan for showcasing the real-world operation of automated driving systems during the Tokyo Olympics and Paralympics in 2020—a stepping stone in addressing the challenges to be met by 2030—and emphasizes the need for multisectoral collaboration, involving industry, government, and academia, to develop new systems and infrastructures which will constitute crucial legacies for future mobility.

THE POTENTIAL FOR ROAD TRANSPORT: A VISION OF MOBILITY FOR 2030



For more information and a video on JAMA’s Mid- and Long-Term Mobility Vision, please visit:

<http://www.jama-english.jp/publications/mobility.html>

The 45th Tokyo Motor Show 2017



Under its “BEYOND THE MOTOR” theme, the 45th Tokyo Motor Show was held from October 27 through November 5, 2017 at Tokyo Big Sight with the participation of 153 companies and organizations, including JAMA’s 14 member manufacturers (presenting 15 brands) and 13 foreign automakers (presenting 19 brands). The 380 vehicles on display featured 64 world premieres, including electric and fuel cell models, while auto parts and equipment manufacturers exhibited more than 40 technology world premieres. The show focused on cutting-edge technologies and services related to automated driving systems, electrification, and connectivity.

In the “TOKYO CONNECTED LAB 2017” special exhibit, three separate, interactive programs, “THE FUTURE”, “THE MAZE” and “THE MEET UP”, let visitors experience mobility’s connected future and contemplate its transformative impacts.



Test-drive/ride programs held in the neighboring Tokyo Waterfront City area gave participants the opportunity to experience advanced safety features and next-generation technologies not only in passenger cars, commercial vehicles and motorcycles, but also in personal mobility transport. Additional show events and visitor services included the Tokyo Motor Show Symposium, tours (for individual/group visitors as well as for elementary-school class visits) of the show guided by automotive journalists, and the highly popular “Gourmet Kingdom” event featuring food stands set up at multiple locations in the show’s venue.

Visitors to the show totalled 771,200, with 87,400 on November 2 alone, representing the largest weekday attendance since the 42nd show (the first to be held at Tokyo Big Sight). Visitors aged 15-39 accounted for 51.3% of the total, up 9.1 points from the previous show, and female visitors for 24.1%, up 6.4 points. The 45th Tokyo Motor Show thus saw increased attendance by women and young people.

● TOKYO MOTOR SHOW HISTORICAL DATA

No.	Year	Dates held (month/day)	Duration (days)	Venue	Number of visitors
41	2009	Oct. 23-Nov. 04	13	Makuhari Messe	614,400
42	2011	Dec. 02-Dec. 11	10	Tokyo Big Sight	842,600
43	2013	Nov. 22-Dec. 01	10	∕	902,800
44	2015	Oct. 29-Nov. 08	11	∕	812,500
45	2017	Oct. 27-Nov. 05	10	∕	771,200

The 46th Tokyo Motor Show 2019

In the lead-up to 2020 when Tokyo will be the focus of worldwide attention, the 46th Tokyo Motor Show, which will aspire to be the most exciting technology-driven motor show ever, will be held in the autumn of 2019 at the main Tokyo Big Sight venue. Various show events are being planned to take place again in the Tokyo Waterfront City area as well as in other areas of Tokyo, to create an optimally enjoyable experience for visitors.

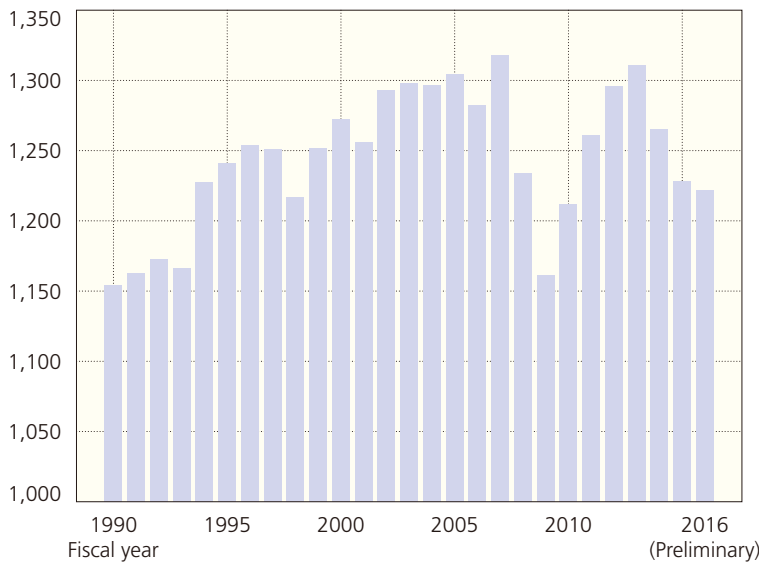
Climate Change and CO₂ Emissions Reduction: The Response of the Transport Sector

In 2016 Japan's CO₂ emissions totalled 1.22 billion tons (preliminary figure), of which the transportation sector accounted for 18%. Since peaking in 2001 following a decade of growth, CO₂ emission volumes in Japan's transport sector have steadily declined, owing largely to increased fuel efficiency in passenger cars and greater efficiency in goods distribution, although they have not yet reached the level recorded in 1990. The automobile industry will continue to vigorously promote CO₂ emissions reduction in road transport by further improving vehicle fuel efficiency and expanding the market supply of next-generation vehicles.

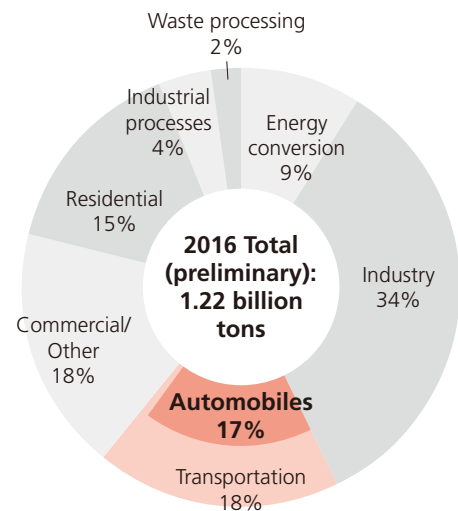
CO₂ EMISSIONS IN JAPAN

The transportation sector accounts for 18% of Japan's total CO₂ emissions, which in 2016 amounted to 1.22 billion tons (preliminary figure).

Japan's CO₂ Emission Volumes, 1990-2016 x 1 million tons



CO₂ Emission Shares by Sector in 2016

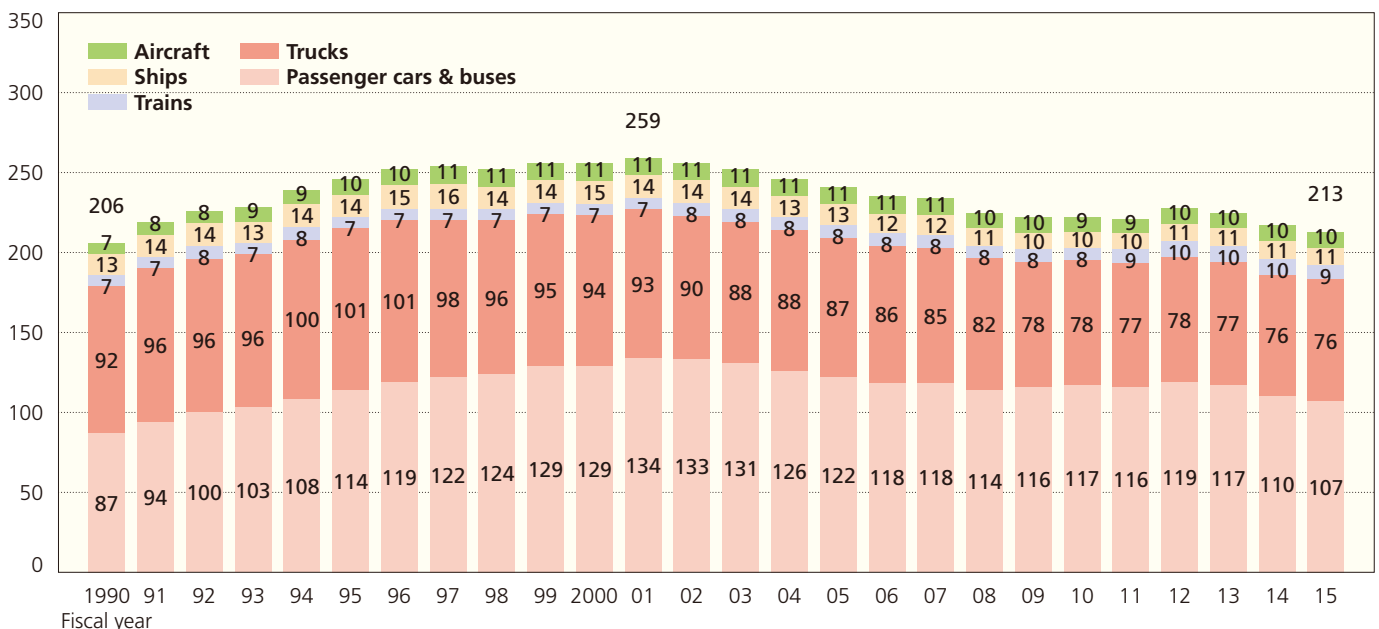


Source: Ministry of the Environment

TRENDS IN CO₂ EMISSION VOLUMES IN JAPAN'S TRANSPORT SECTOR, BY MODE

Motor vehicle-emitted CO₂ accounts for about 90% of the totality of CO₂ emitted by Japan's transport sector. CO₂ emissions from road transportation in Japan have seen a significant decrease since transport-sector emissions peaked in 2001.

x 1 million tons

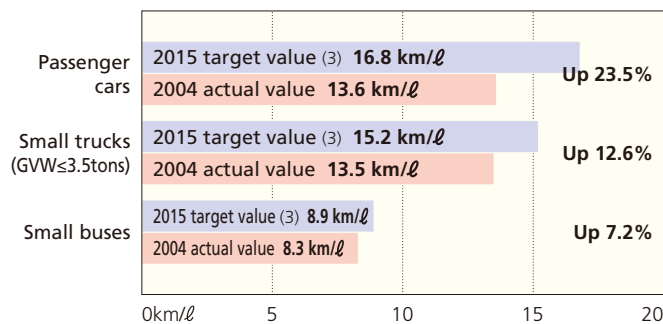


Source: Ministry of the Environment

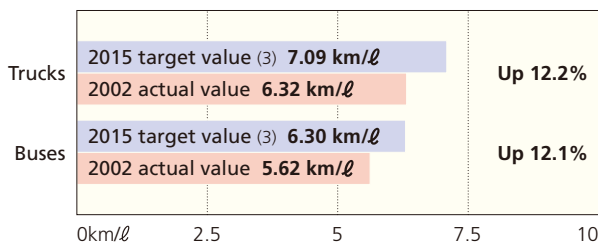
CO₂ Emissions Reduction: Improving Vehicle Fuel Efficiency

Fuel efficiency targets for passenger cars, trucks, and buses are formulated by applying “top runner” criteria whereby the target value for a given vehicle weight category is established based on the leading fuel efficiency performance to date for that weight category. To comply with stringent 2015 average fuel efficiency targets for passenger cars and small trucks and buses as well as for heavy-duty vehicles and, subsequently, with even stricter 2020 targets for passenger cars and 2022 targets for small trucks, JAMA member manufacturers have been making continuous efforts to increase the fuel efficiency of conventional vehicles and expand the supply of alternative-energy vehicles.

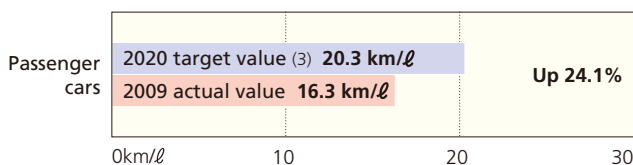
2015 AVERAGE FUEL EFFICIENCY TARGETS FOR NEW PASSENGER CARS & SMALL TRUCKS/BUSES (1)



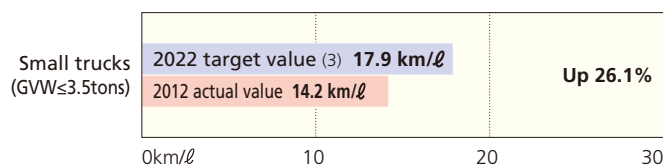
2015 AVERAGE FUEL EFFICIENCY TARGETS FOR NEW HEAVY-DUTY VEHICLES (GVW>3.5t) (2)



2020 AVERAGE FUEL EFFICIENCY TARGET FOR NEW PASSENGER CARS (1)



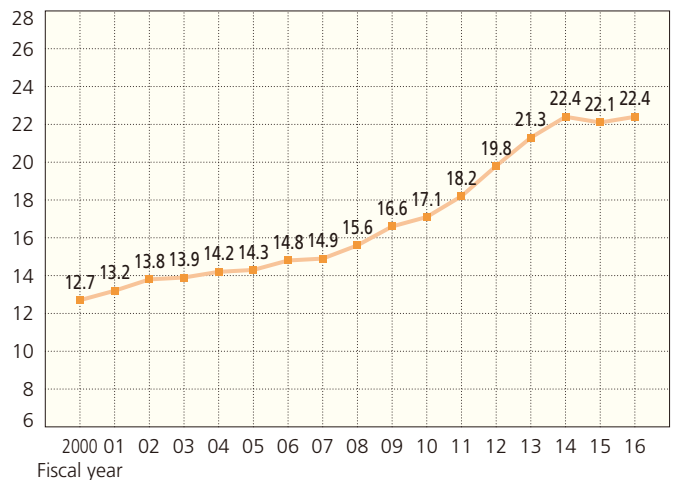
2022 AVERAGE FUEL EFFICIENCY TARGET FOR NEW SMALL TRUCKS (1)



(1) Fuel efficiency is JC08 test cycle-based (see page 67). (2) Fuel efficiency is JE05 test cycle-based. (3) Targets were established assuming the same shipment volume ratios by vehicle weight category for target years as those recorded in the years showing the actual value of fuel efficiency performance.

Sources: Ministry of Economy, Trade and Industry; Ministry of Land, Infrastructure, Transport and Tourism

AVERAGE FUEL EFFICIENCY OF DOMESTIC NEW GASOLINE-POWERED PASSENGER CARS In km/ℓ



Note: Figures here are JC08 test cycle-based (see page 67).

Source: Japan Automobile Manufacturers Association

VEHICLE TECHNOLOGIES FOR INCREASED FUEL EFFICIENCY

Improved engine efficiency

More efficient fuel consumption:

- Direct injection
- Variable mechanisms (variable cylinder activation, VVT&L, etc.)
- Downsized engine supercharging

Reduction of friction loss:

- Reduction of piston & piston ring friction loss
- Low-viscosity lubricating oil

Reduced aerodynamic drag

- Improved body configuration

Reduced vehicle weight

- Expanded use of lightweight materials
- Improved body structure

Improved powertrain performance

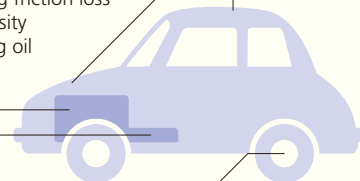
- Expansion of lock-up area
- Expanded number of transmission gears
- Continuously variable transmission

Reduced rolling resistance

- Low rolling-resistance tires

Other

- Electric power steering
- Idling prevention (stop-start)



In-Use Status of Next-Generation Vehicles

Beginning in 2009, when the government's tax incentive/subsidy programs for the purchase of eco-friendly vehicles were first introduced, the share of (so-called in Japan) next-generation vehicles—including hybrid, plug-in hybrid, electric, fuel cell, clean diesel, and other new-energy vehicles—in total passenger car sales surged. In 2017 next-generation vehicles accounted for more than 36% of new passenger car registrations. The more widespread use of these vehicles requires not only further advances in vehicle and related technologies, but also, among other government initiatives, the establishment of the necessary fuel/energy supply infrastructures and the continued provision of purchasing incentives.

● NEXT-GENERATION PASSENGER CAR NEW REGISTRATIONS, 2008-2017

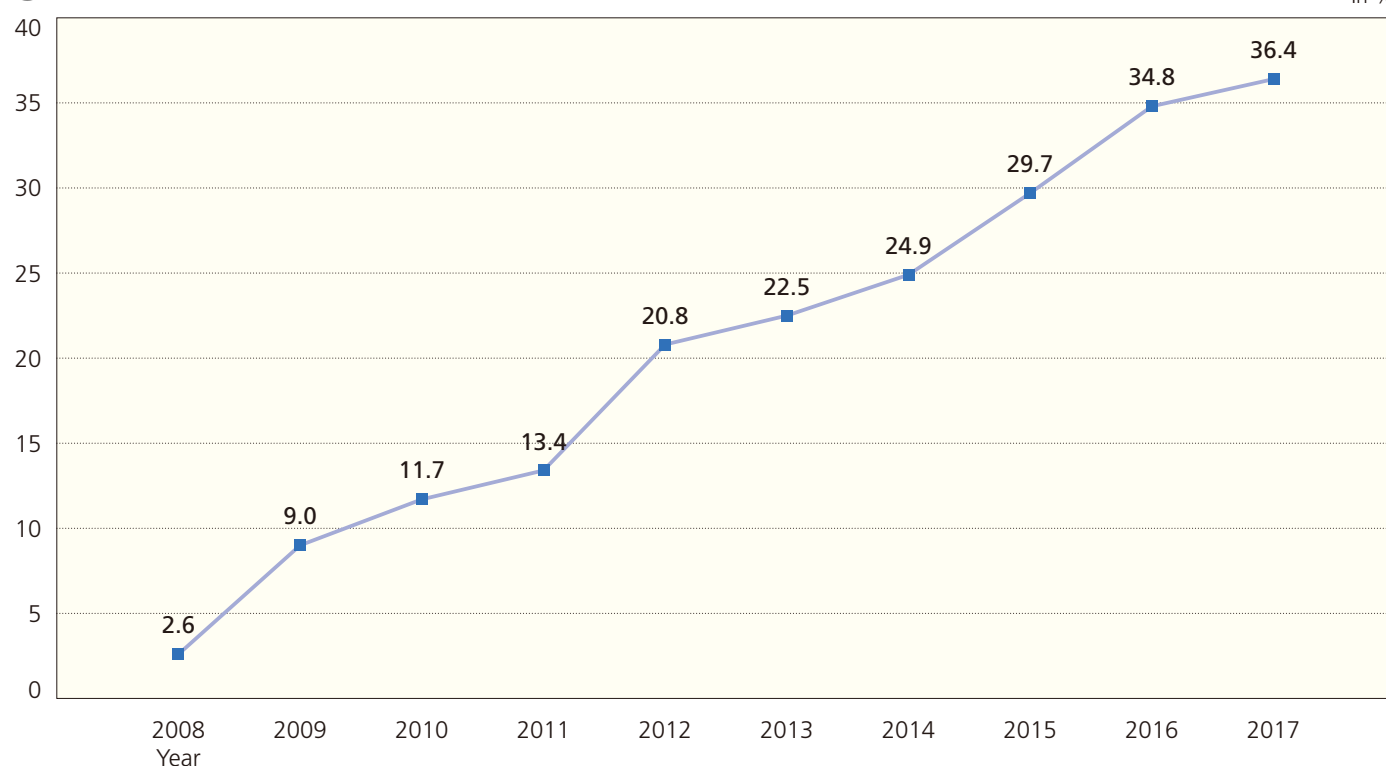
In vehicle units

Year	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Hybrid vehicles	108,518	347,999	481,221	451,308	887,863	921,045	1,058,402	1,074,926	1,275,560	1,385,343
Plug-in hybrid vehicles	0	0	0	15	10,968	14,122	16,178	14,188	9,390	36,004
Electric vehicles	0	1,078	2,442	12,607	13,469	14,756	16,110	10,467	15,299	18,092
Fuel cell vehicles	0	0	0	0	0	0	7	411	1,054	849
Clean diesel vehicles	0	4,364	8,927	8,797	40,201	75,430	78,822	153,768	143,468	154,803
Total	108,518	353,441	492,590	472,727	952,501	1,025,353	1,169,519	1,253,760	1,444,771	1,595,091

Source: Japan Automobile Manufacturers Association

● TRENDS IN NEXT-GENERATION VEHICLE SHARE IN NEW PASSENGER CAR REGISTRATIONS

In %



Source: Japan Automobile Manufacturers Association

Promoting Fuel-Conserving Ecodriving

Individual drivers can increase fuel efficiency and thus help reduce CO₂ emissions by improving their driving habits. JAMA has therefore been conducting an ongoing public-awareness campaign, in collaboration with the government and industry partners, to promote sound, fuel-conserving ecodriving practices, urging drivers to adopt the ten smart tips listed below. While the already widespread use of digital tachographs in truck fleet operations in Japan continues to expand, automakers are equipping more and more passenger cars not only with fuel efficiency gauges and systems for real-time on-screen displays of fuel efficiency performance, but also with idling-prevention (stop-start) systems and “eco-mode” buttons that activate fuel efficiency-promoting functions.

ECODRIVING 10 tips

● TEN TIPS FOR FUEL-CONSERVING ECODRIVING as promoted in Japan

1. Accelerate gently.



Think “eco-start” when you accelerate—increasing your speed at a relaxed pace, to 20km/h in 5 seconds, boosts fuel efficiency by 10%.

2. Maintain a steady speed and keep your distance.



Maintain a suitably steady speed for safe and fuel-efficient driving. Tailgating leads to unnecessary acceleration/deceleration, resulting in 2% and 6% lower fuel efficiency in urban and suburban areas, respectively.

3. Slow down by releasing the accelerator.



Releasing the accelerator when recognizing the need to slow down (e.g., at changing traffic lights) stops the fuel supply, resulting in a 2% gain in fuel efficiency. Use your engine’s braking function whenever appropriate, including on downhill descents.

4. Make appropriate use of your air conditioner.



Don’t leave your AC on when you’re heating the cabin. When you use it for cooling, be sure not to set it too low. Continuous use of the AC functioning at 25°C when the outdoor temperature is 25°C results in a fuel efficiency loss of 12%.

5. Don’t warm up or idle your engine.



Today’s passenger cars don’t require warming up, so start off slowly right after turning on the ignition. When waiting or loading/unloading, make a habit of turning your engine off instead of letting it idle. Ten minutes of engine idling (with the AC off) wastes 130cc of fuel. (See notes below.)

6. Plan your itinerary to avoid congested routes.



Plan the route to your destination using a map or your navigation system before starting off. Check traffic information to avoid congested areas and save time and fuel. Ten minutes of unnecessary driving in a one-hour trip results in a 17% drop in fuel efficiency.

7. Check your tire pressure regularly.



Driving on tires whose air pressure is 50kPa (0.5kg/cm²) lower than it should be decreases fuel efficiency by 2% in urban areas and 4% in suburban areas.

8. Reduce your load.



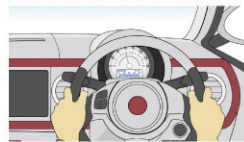
Onboard weight is a key factor in fuel efficiency performance. Driving with 100kg of unnecessary onboard weight causes a 3% loss in fuel efficiency. Another factor is your vehicle’s aerodynamic drag, which you can reduce by removing exterior rack equipment when not in use.

9. Respect parking rules and regulations.



Don’t leave your vehicle where it blocks traffic. Illegal or imprudent on-street parking causes traffic congestion which leads to increased emissions and a greater risk of accident.

10. Check the readings on your fuel efficiency-monitoring equipment.



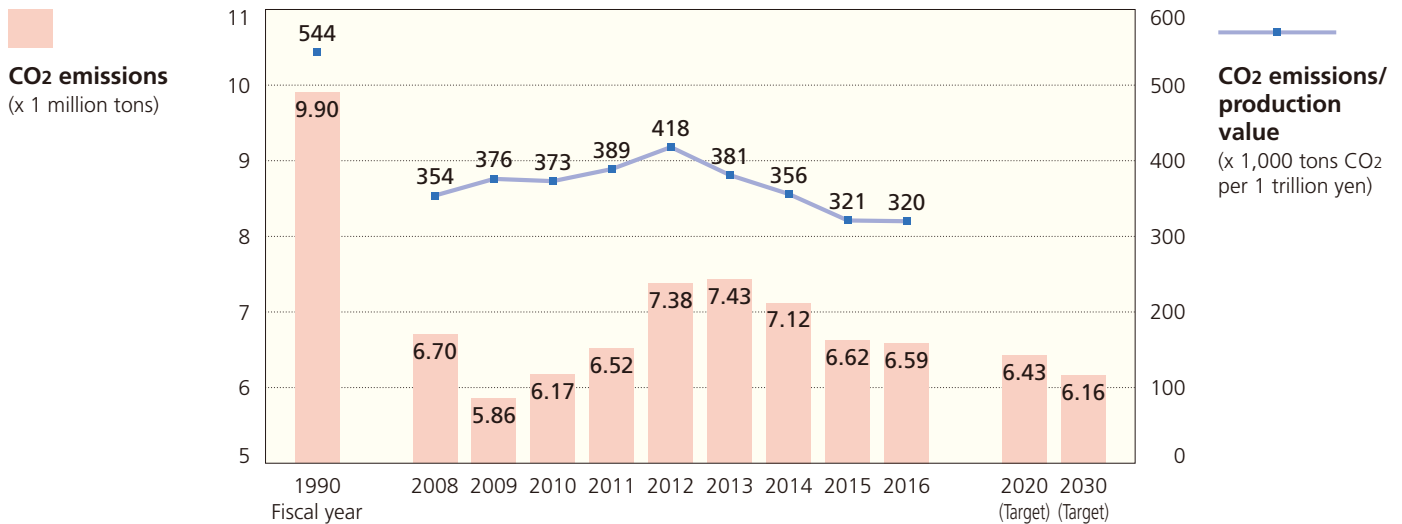
Be aware of your vehicle’s fuel efficiency performance by consulting onboard equipment that monitors it.

Notes: 1. Warming up a vehicle engine is necessary only in extremely cold climates (-20°C or colder) or after long periods of non-use. 2. For drivers stopping engine idling manually, i.e. by turning their vehicle’s ignition off and then back on again, caution is advised as follows (but does not apply to drivers of vehicles equipped with idling-prevention systems): 1) Stepping on the brake pedal repeatedly during engine shut-down may diminish braking power; 2) Drivers not accustomed to shutting down their engines and starting them up again may experience slow or faulty restarts; 3) Excessive shutting down and restarting may drain the batteries, resulting in engine start-up failure; 4) Do not use this method when stopped at the head of a line or on a gradient, because turn signals and windshield wipers, as well as airbags and other safety features, will not function during engine shut-down.

CO2 Reductions at Manufacturers' Facilities

Japan's automakers, together with the member companies of the Japan Auto-Body Industries Association (JABIA), have for years taken measures to reduce energy consumption and otherwise cut CO2 emissions at their production plants. Having more recently expanded their voluntary CO2 reduction activities to also include administrative and research facilities, their combined facility-emitted CO2 in 2016 totalled 6.59 million tons, down 30,000 tons from the previous year. In line with targets set in 2016, JAMA and JABIA members now aim to reduce their combined facility-emitted CO2 to 6.43 million tons (a 35% reduction from the 1990 level) by 2020 and to 6.16 million tons (a 38% reduction from 1990) by 2030.

● FACILITY-GENERATED CO2 EMISSION VOLUMES, 1990-2016



Source: Japan Automobile Manufacturers Association

Voluntary Initiatives to Reduce the Use of Hazardous Substances in Motor Vehicles

JAMA member manufacturers have, on a voluntary basis, eliminated the use of four so-called substances of concern (SOCs)—lead, mercury, hexavalent chromium and cadmium—in new vehicles to lessen their environmental impact, particularly when they are dismantled and processed at the end of their service life. Separate restrictions on the use of SOC's have been established for motorcycles.

● RESTRICTIONS ON THE USE OF SUBSTANCES OF CONCERN IN NEW VEHICLES & COMPLIANCE STATUS

SOC	Restrictions	Compliance Status
Lead	As of January 2006, a 90% decrease or more from the 1996 level of 1,850 grams (i.e., a maximum permissible level of 185 grams)*; for large commercial vehicles including buses, a 75% decrease or more from the 1996 level. *Batteries are exempt.	All models have complied since January 2006.
Mercury	As of January 2005, banned except for trace amounts in safety-related components such as: - Instrument panel displays - Liquid crystal displays in navigation devices - Discharge lamps - Fluorescent cabin lamps	All models have complied since January 2003. Safety-related components listed here in the left column are now mercury-free in all models.
Hexavalent chromium	Banned as of January 2008.	All models have complied since January 2008.
Cadmium	Banned as of January 2007.	All models have complied since January 2006.

A Voluntary Approach to Reducing Vehicle Cabin VOCs

New-model passenger cars marketed in and after 2007 and new-model commercial vehicles sold in and after 2008 have met the target values established by Japan's Ministry of Health, Labor and Welfare for indoor concentration levels of 13 volatile organic compounds (VOCs). In July 2012, ISO 12219-1 was established as the global standard for restricting the use of in-cabin VOCs in passenger cars. Accordingly, JAMA's previously established VOC test procedure for passenger cars was replaced by the ISO procedure. For trucks and buses not covered by the ISO standard, however, JAMA test methods for measuring in-cabin VOC concentration levels remain in application. Meanwhile, automakers are working to lower in-cabin VOC concentration levels even further. This voluntary initiative applies only to vehicles that are manufactured and sold in Japan.

● COMPARISON OF JAMA AND ISO IN-CABIN VOC TEST PROCEDURES

	JAMA Procedure	ISO Procedure (For passenger cars)
Heating method	Radiation lamp heating from above the cabin (No radiation density prescribed.)	Radiation lamp heating from above the cabin (Radiation density: 400±50 W/m ²)
In-cabin temperature	40°C in driver's breathing zone (Note: 35°C for buses.)	No in-cabin test temperature prescribed. (Presumed to be 40°C in driver's breathing zone [compact car].)
Pre-test conditions	Cabin doors and windows left open for at least 30 minutes.	Cabin doors and windows left open for one hour.
Ambient mode	—	Cabin doors and windows closed for at least 7.5 hours, then cabin air sample-tested over a period of 30 minutes.
Parking mode (airtight state)	Cabin air sample-tested over a period of 30 minutes, 4.5 hours after reaching the prescribed temperature.	Cabin air sample-tested over a period of 30 minutes, 3.5 hours after start of heating.
Driving mode	Cabin air sample-tested over a period of 15 minutes, with engine and AC on (internal air circulation mode). (Note: 30 minutes for trucks and 120 minutes for buses.)	Cabin air sample-tested over a period of 30 minutes, with engine and AC on (external air ventilation mode).
Test procedure schematic	<p>(For passenger cars)</p>	<p>B.G.: "Background" air, i.e., air in test chamber.</p>

Source: ISO 12219-1:2012

● TARGET VALUES FOR INDOOR CONCENTRATION LEVELS OF 13 SUBSTANCES (VOCs)

Substance	Target Value for Indoor Concentration Level	Principal Sources
Formaldehyde	100 $\mu\text{g}/\text{m}^3$ (0.08 ppm)	Adhesives for plywood, wallpaper, etc.
Toluene	260 $\mu\text{g}/\text{m}^3$ (0.07 ppm)	Adhesives/paints for interior finishing materials, furniture, etc.
Xylene	870 $\mu\text{g}/\text{m}^3$ (0.20 ppm)	Adhesives/paints for interior finishing materials, furniture, etc.
Paradichlorobenzene	240 $\mu\text{g}/\text{m}^3$ (0.04 ppm)	Moth repellents, lavatory air fresheners
Ethylbenzene	3,800 $\mu\text{g}/\text{m}^3$ (0.88 ppm)	Adhesives/paints for plywood, furniture, etc.
Styrene	220 $\mu\text{g}/\text{m}^3$ (0.05 ppm)	Insulation materials, bath units, tatami-mat core materials
Chlorpyrifos	1 $\mu\text{g}/\text{m}^3$ (0.07 ppb) (see note)	Insecticides (esp. ant exterminators)
Di-n-butyl phthalate	220 $\mu\text{g}/\text{m}^3$ (0.02 ppm)	Paints, pigments, adhesives
Tetradecane	330 $\mu\text{g}/\text{m}^3$ (0.04 ppm)	Kerosene, paints
Di-2-ethylhexyl phthalate	120 $\mu\text{g}/\text{m}^3$ (7.6 ppb)	Wallpaper, flooring materials, wire-coating materials
Diazinon	0.29 $\mu\text{g}/\text{m}^3$ (0.02 ppb)	Pesticides
Acetaldehyde	48 $\mu\text{g}/\text{m}^3$ (0.03 ppm)	Adhesives for construction materials, wallpaper, etc.
Fenobucarb	33 $\mu\text{g}/\text{m}^3$ (3.8 ppb)	Insecticides (esp. termite exterminators)

Note: 0.1 $\mu\text{g}/\text{m}^3$ (0.007 ppb) for children.

Global Harmonization in the Regulation of Vehicle Exhaust Emissions

Japan's vehicle exhaust emissions regulations have always been among the world's most stringent, and its automakers have worked very hard to develop the advanced technologies required to comply with them. As a result, NO_x and other atmospheric pollutant levels have been, even in large urban areas, on a steady decline. Japan has participated in international discussions on the global harmonization of emission test cycles and in 2010 introduced the UN test cycle for motorcycle emissions. In 2018 Japan adopted the UN "WLTP" test cycle to measure emissions from new gasoline-powered passenger cars and light commercial vehicles, following its adoption in 2016 of the UN "WHTC" test cycle for measuring diesel exhaust emissions from new heavy-duty vehicles (see corresponding notes below).

MOTOR VEHICLE EMISSIONS REGULATIONS IN JAPAN

Vehicle Type			Current Regulations			
			Test cycle	Year enforced	Emission	Regulatory value (Average)
Gasoline and LPG Vehicles	Passenger cars		WLTP (g/km) (1)	2018	CO	1.15
					NMHC	0.10
					NO _x	0.05
			WLTP (g/km) (1)	2018	PM (2)	0.005
	Trucks and buses	Mini	WLTP (g/km) (1)	2019	CO	4.02
					NMHC	0.10
					NO _x	0.05
				PM (2)	0.005	
		Light-duty (GVW≤1.7t)	WLTP (g/km) (1)	2019	CO	1.15
			WLTP (g/km) (1)	2018	NMHC	0.10
				NO _x	0.05	
				PM (2)	0.005	
Medium-duty (1.7t<GVW≤3.5t)		WLTP (g/km) (1)	2018	CO	2.55	
		WLTP (g/km) (1)	2019	NMHC	0.15	
		NO _x	0.07			
		PM (2)	0.007			
Heavy-duty (GVW>3.5t)	WLTP (g/km) (1)	2019	CO	16.0		
	JE05 (g/kWh)	2009	NMHC	0.23		
		NO _x	0.7			
		PM (2)	0.01			
Diesel Vehicles	Passenger cars (3)		WLTP (g/km) (1)	2018	CO	0.63
					NMHC	0.024
					NO _x	0.15
					PM	0.005
	Trucks and buses	Light-duty (GVW≤1.7t)	WLTP (g/km) (1)	2018	CO	0.63
					NMHC	0.024
					NO _x	0.15
					PM	0.005
		Medium-duty (1.7t<GVW≤3.5t)	WLTP (g/km) (1)	2019	CO	0.63
					NMHC	0.024
				NO _x	0.24	
				PM	0.007	
Heavy-duty (GVW>3.5t)	WHTC (g/kWh) (4)	2016	CO	2.22		
			NMHC	0.17		
	NO _x (5)	2016	NO _x (5)	0.4		
			PM	0.01		
Motorcycles	Class I motorcycles*		WMTC (g/km) (6)	2016 (7)	CO	1.14
	Under 0.150ℓ in engine capacity with a maximum speed of 50km/h, or under 0.150ℓ in engine capacity with a maximum speed of 99km/h. *Equivalent to motor-driven cycles, Class 1 and Class 2.				THC	0.30
					NO _x	0.07
	Class II motorcycles*		WMTC (g/km) (6)	2016 (7)	CO	1.14
	Under 0.150ℓ in engine capacity with a maximum speed of <130km/h, or 0.150ℓ or over in engine capacity with a maximum speed of <130km/h. *Equivalent to mini-sized and small-sized motorcycles with a maximum speed of <130km/h.				THC	0.20
					NO _x	0.07
	Class III motorcycles*		WMTC (g/km) (6)	2016 (7)	CO	1.14
	With a maximum speed of ≥130km/h. *Equivalent to mini-sized and small-sized motorcycles with a maximum speed of ≥130km/h.				THC	0.17
					NO _x	0.09

(1) WLTP: Worldwide Harmonized Light Vehicles Test Procedure, on the basis of values measured in cold-start state. (2) PM values apply only to direct-injection, lean-burn vehicles equipped with absorption-type NO_x reduction catalysts. (3) Small-sized diesel passenger cars have an equivalent inertia weight (EIW) of 1.25t (GVW of 1.265t) or less, and mid-sized diesel passenger cars have an EIW over 1.25t. (4) WHTC: World Harmonized Transient Cycle, on the basis of values measured in cold-start state) x 0.14 + (values measured in warm-start state) x 0.86. (5) Enforcement: 2016 for GVW>7.5t; 2017 for tractors; 2018 for 3.5t<GVW≤7.5t. (6) WMTC: World Motorcycle Test Cycle. (7) 2017 enforcement for in-production models first launched prior to 2016.

Note: CO: Carbon monoxide; NMHC: Non-methane hydrocarbons; THC: Total hydrocarbons; NO_x: Nitrogen oxides; PM: Particulate matter.

Sources: Ministry of the Environment; Ministry of Land, Infrastructure, Transport and Tourism

Improving Air Quality

Japan's central government as well as local governments in major metropolitan areas have implemented measures to address air quality problems caused by motor vehicles. In accordance with national legislation aimed at curbing nitrogen oxide (NO_x) and particulate matter (PM) emissions, the issuance of inspection-compliance certification is prohibited for vehicles that fail to meet the legal standards at inspection time. Moreover, local governments in major metropolitan areas have introduced additional regulations for diesel trucks and buses for the specific purpose of reducing PM emissions. Enforcement of those regulations means that restrictions are imposed on diesel vehicle circulation in the areas concerned.

● PROVISIONS OF THE NATIONAL AUTOMOTIVE NO_x AND PM LAW/ DIESEL TRUCK & BUS PM EMISSION REGULATIONS FOR MAJOR METROPOLITAN AREAS

	Provisions of the National Automotive NO _x and PM Law (Major Metropolitan Areas)	Provisions of PM Emission Regulations for Diesel Vehicles (Major Metropolitan Areas)
Areas Regulated	Tokyo and Aichi, Chiba, Hyogo, Kanagawa, Mie, Osaka, and Saitama (designated areas)	Tokyo (except for islands) and Chiba, Kanagawa, and Saitama (all areas); Hyogo (designated areas); Osaka (same areas as those designated under the Automotive NO _x & PM Law)
Vehicle Types Regulated	Diesel, gasoline, and LPG trucks and buses Diesel passenger cars	Diesel trucks and buses Note: Not applicable to diesel passenger vehicles with up to 10-person occupancy.
Substances Regulated	NO _x and PM	PM only NO _x and PM in Hyogo and Osaka
Regulatory Values in Force	<p>Trucks and Buses GVW = Gross vehicle weight</p> <p>GVW=1.7 tons & under: NO_x: 0.48g/km (same as 1988 regulatory value for new gasoline vehicles) PM: 0.055g/km (half the 2002 regulatory value for new diesel vehicles)</p> <p>GVW=Over 1.7 tons to 2.5 tons: NO_x: 0.63g/km (same as 1994 regulatory value for new gasoline vehicles) PM: 0.06g/km (half the 2003 regulatory value for new diesel vehicles)</p> <p>GVW=Over 2.5 tons to 3.5 tons: NO_x: 5.9g/kWh (same as 1995 regulatory value for new gasoline vehicles) PM: 0.175g/kWh (half the 2003 regulatory value for new diesel vehicles)</p> <p>GVW=Over 3.5 tons: NO_x: 5.9g/kWh (same as 1998-1999 regulatory value for new diesel vehicles) PM: 0.49g/kWh (same as 1998-1999 regulatory value for new diesel vehicles)</p> <p>Passenger Cars NO_x: 0.48g/km (same as 1978 regulatory value for new gasoline vehicles) PM: 0.055g/km (half the 2002 regulatory value for new diesel vehicles)</p>	<p>In Chiba and Kanagawa, same as 1997, 1998, and 1999 regulatory values for new diesel trucks and buses</p> <p>In Tokyo and in Saitama, same as 2002, 2003, and 2004 regulatory values for new diesel trucks and buses</p> <p>In Hyogo and Osaka, same values as those mandated by the Automotive NO_x & PM Law</p>
Specific Provisions	<p>New Vehicles In regulated areas, new vehicles not meeting the standards cannot be registered.</p> <p>Vehicles in Use Regulated vehicles whose principal places of use (as declared in their inspection certificates) fall in regulated areas and that do not meet the standards will not be granted inspection certification after grace periods have expired.</p> <p>Note: Vehicles whose principal places of use (as declared in their inspection certificates) do not fall in regulated areas can travel through regulated areas even if they do not meet the standards.</p>	<p>New Vehicles No restriction.</p> <p>Vehicles in Use Vehicles not meeting the standards are prohibited from travelling through regulated areas after grace periods have expired. In Osaka, vehicles not meeting the standards are prohibited from travelling on roads directly accessing regulated areas. In Tokyo and in Chiba, Kanagawa, and Saitama, vehicles equipped with local government-specified PM reduction systems are deemed to be in compliance with the standards.</p> <p>Note: Applicable to diesel trucks and buses registered anywhere in Japan and travelling through regulated areas.</p>
Grace Periods	<p>From first registration:</p> <ul style="list-style-type: none"> • Small trucks 8 years etc. • Diesel passenger cars 9 years etc. • Standard trucks 9 years etc. • Minibuses 10 years etc. • Large buses 12 years etc. 	<p>Seven years from first registration, regardless of vehicle type (truck or bus)</p> <p>Note: In Chiba, vehicles neither registered in nor travelling through areas designated under the Automotive NO_x & PM Law will be exempted for a period of 12 years, provided vehicle owners apply for such an exemption. In Hyogo, grace periods differ according to year of first registration and vehicle type. In Osaka, grace periods are the same as those specified in the Automotive NO_x & PM Law.</p>

Vehicle Recycling and Waste Reduction

Under Japan’s End-of-Life Vehicle (ELV) Recycling Law which entered into force in January 2005, automobile manufacturers and importers are responsible for recovery, recycling and appropriate disposal with respect to fluorocarbons, airbags, and automobile shredder residue (ASR). Compliance with the law was anticipated to enable ASR to be recycled at a rate of 70% by 2015, resulting in an automobile recycling rate, by vehicle weight, of 95% (as compared with the 80% rate prevailing prior to the introduction of the law); those rates were in fact surpassed in 2008. Japan’s vehicle recycling infrastructure as mandated by its ELV Recycling Law is the first in the world to administer the entire process of auto recycling—from ELV recovery to final disposal—on the basis of electronic “manifests” (or compliance checklists). JAMA itself played a central role in the development and implementation of this advanced vehicle recycling system; it has, moreover, provided continuous cooperation in, and financial support for, the development, maintenance, and upgrading of related systems. In line with legislative provisions promoting the so-called 3R initiatives (“reduce, reuse, and recycle”), Japan’s automakers are also striving to design vehicles using lightweight materials that are easy to dismantle and recycle, and to reduce and recycle waste generated in the manufacturing process. In 2016 the volume of auto plant-generated waste destined for landfill disposal totalled 300 tons. Having long surpassed the target of 1,000 tons set for 2020, JAMA members will nevertheless continue to promote the reduction of plant-generated waste for landfill disposal.

● INDUSTRY MEASURES IN LINE WITH NATIONAL LEGISLATION

	Promotion of Effective Utilization of Resources Law (the “3R” Law)		Distribution, Servicing and Use	End-of-Life Vehicle Recycling Law
	Product Design	Waste Management		ELV Recycling
“Reduce” initiatives	For designated products (1): - Weight reduction/ Downsizing - Longer product life - Reduced use of hazardous substances	For designated areas of activity: - Reduction/recycling of designated waste products generated in vehicle manufacturing operations: 1) Scrap metals 2) Casting sand residue		Basic premise: - Environmentally responsible vehicle design on the part of automobile manufacturers
“Reuse” initiatives	For designated products (2): - Use of reusable/recyclable materials			
“Recycle” initiatives	- Ease of dismantling - Ease of sorting - Non-hazardous recycling - Materials identification	- Total waste volume*: 1990 (baseline): 352,000 tons ↓ 2016: 300 tons JAMA target: 1,000 tons by fiscal 2020 *For landfill disposal, including scrap metals, casting sand residue, and other waste		- Recovery and recycling of: 1) Fluorocarbons 2) Airbags 3) ASR Note: Motorcycles are not covered by the ELV Recycling Law.

(1) Nineteen products including automobiles have been designated in this legislation as requiring “reduce” initiatives in their design. (2) Twenty-three products including automobiles have been designated in this legislation as requiring “reuse” and “recycle” initiatives in their design.

● ELV RECOVERY IN NUMBERS

In vehicle units

Fiscal Year		2016	2017
No. of ELVs recovered		3,096,790	3,304,942
Appropriate disposal of three designated items	Fluorocarbons	2,674,057	2,861,858
	Airbags (1)	2,373,276	2,639,270
	ASR (2)	3,029,981	3,197,796

(1) Through recovery/appropriate disposal of inflators or through onboard deactivation. (2) Covers all categories of processors, whether for direct disposal or for transfer to other markets.

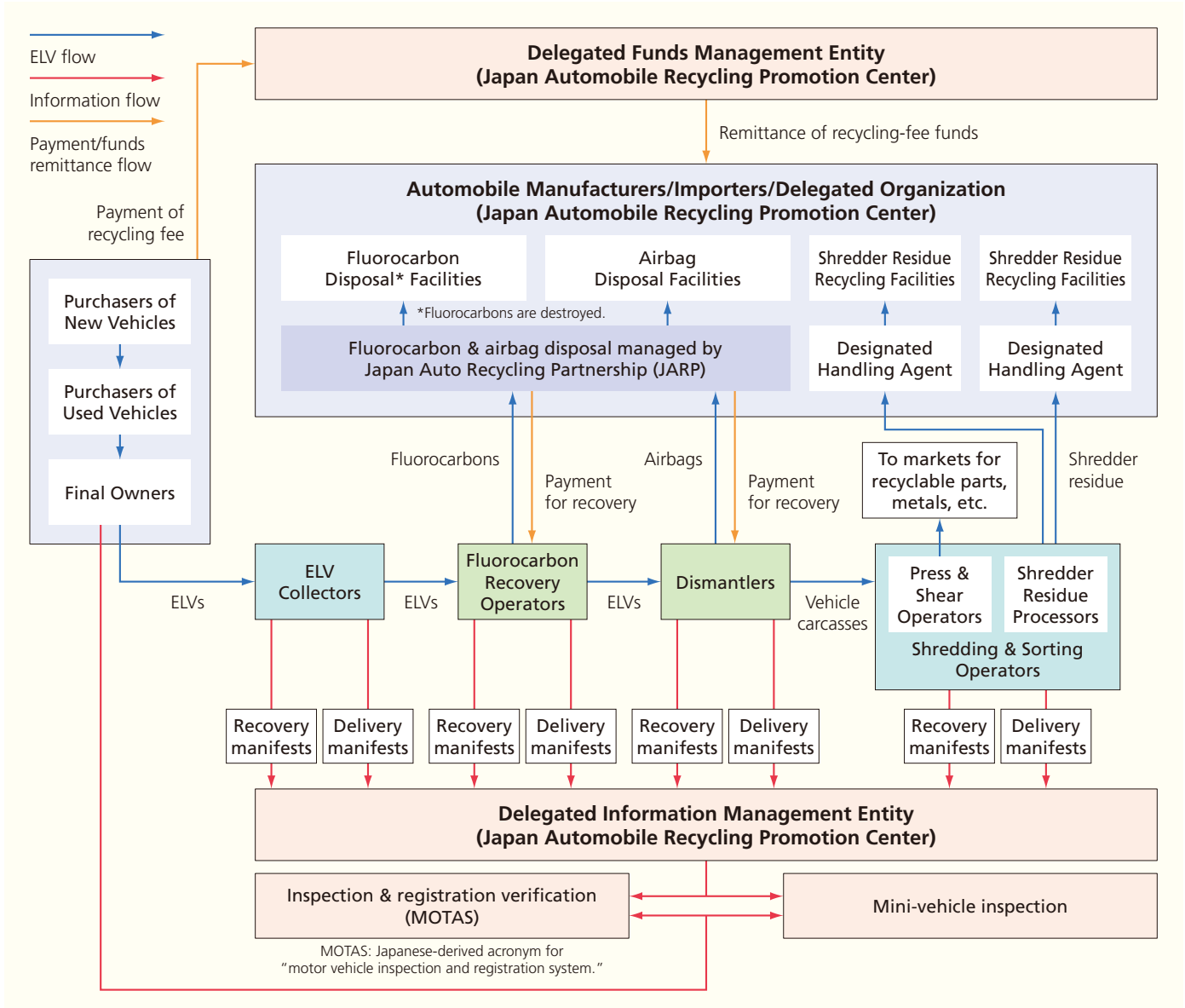
Sources: Japan Automobile Recycling Promotion Center; Japan Auto Recycling Partnership; Toyota Recycle Corporation; “ART” group of companies

● RECYCLING RATES: TARGETED & ACHIEVED

Three Designated Items	Target	Achieved
Fluorocarbons	Destruction	2.7 million vehicle units (2016)
Airbags	85%	93-94% (2016)
ASR	2005: 30% 2010: 50% 2015: 70%	97.3-98.7% (2016)

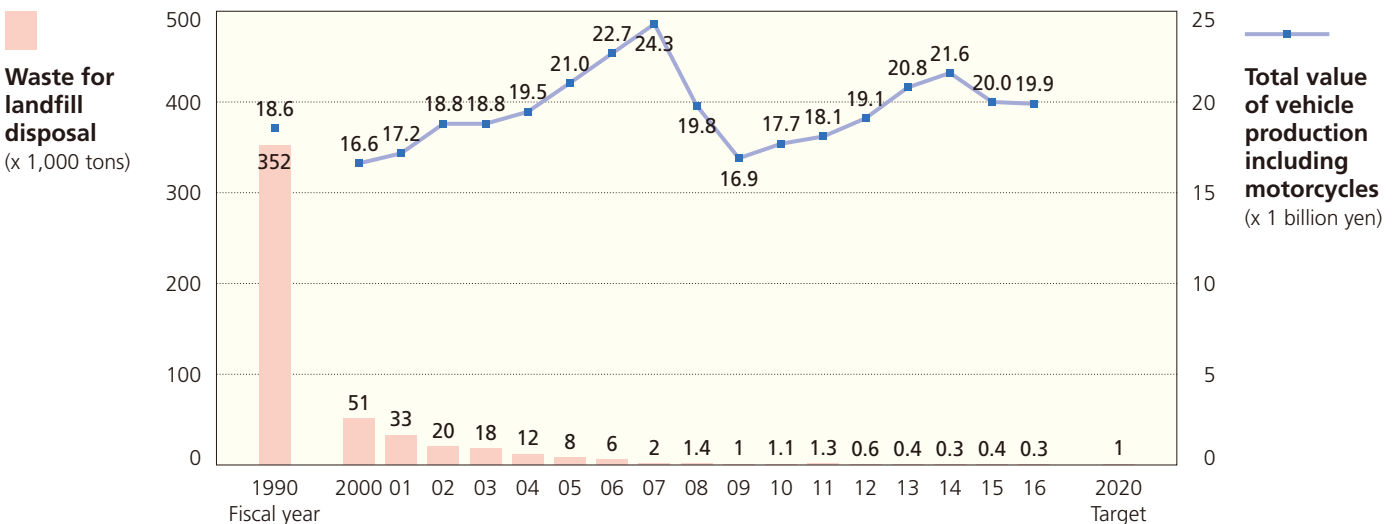
Sources: Government-affiliated entities

● THE ELV RECYCLING FLOW (as per the provisions of the End-of-Life Vehicle Recycling Law)



Note: The Japan Automobile Recycling Promotion Center assumes the same responsibilities as automobile manufacturers and importers when an ELV has no manufacturer representation under the provisions of this law. It also assumes transport-to-mainland costs for ELVs turned in on Japan's smallest islands.

● REDUCTIONS IN PRODUCTION PLANT-GENERATED WASTE



Source: Japan Automobile Manufacturers Association

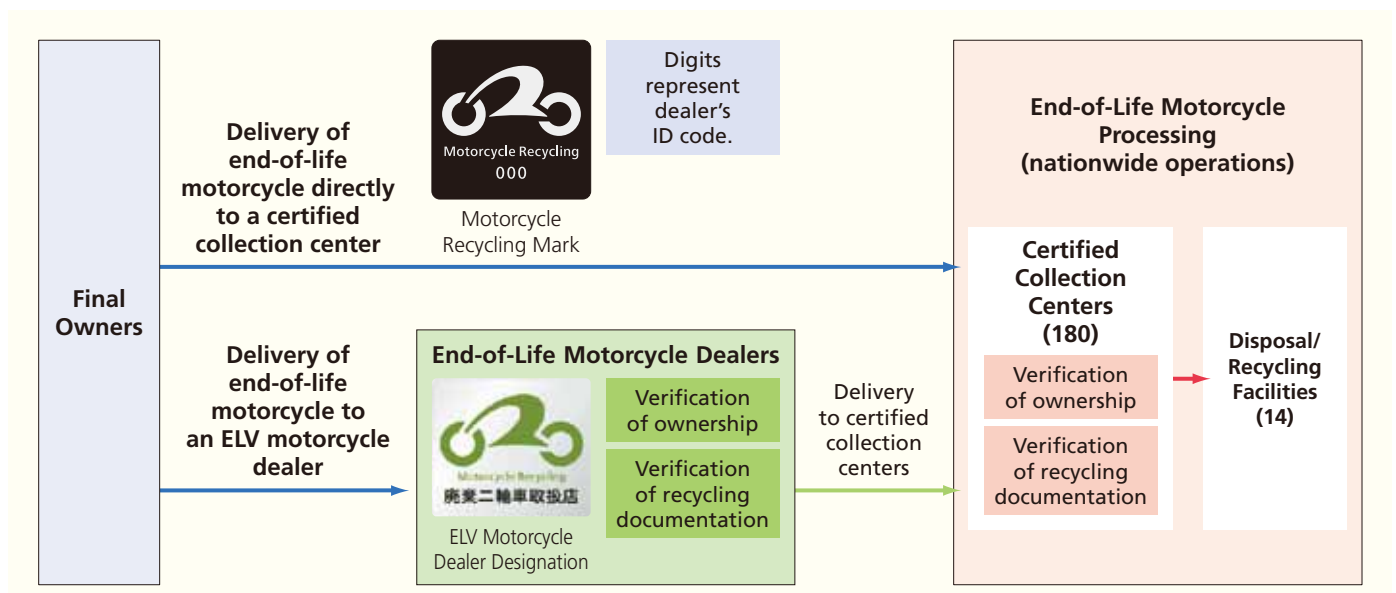
Voluntary Initiatives to Recycle Commercial Vehicle Rack Equipment and Motorcycles

Japan's End-of-Life Vehicle Recycling Law does not cover some types of commercial vehicle rack and custom equipment, nor does it cover motorcycles. In response, JAMA, in cooperation with the Japan Auto-Body Industries Association, promotes the voluntary development and use of rack equipment that is easy to dismantle and contains minimal amounts of hazardous substances. JAMA has also introduced a recycling-and-disposal system for such equipment and encourages operator participation in the system. A total of 159 operators across Japan are now participating in this system voluntarily. Meanwhile, since October 2004 JAMA's four motorcycle-manufacturing members, along with 12 motorcycle importers, have been voluntarily operating a recycling system under which motorcycle dealers nationwide sell only vehicles that feature an official motorcycle recycling mark, enabling, without any additional charge to their final owners, their recovery and processing through the proper disposal channels at the end of their service life. In October 2011, the motorcycle recycling fee was eliminated for vehicles sold prior to the introduction of the motorcycle recycling system seven years earlier. The disposal of municipally-owned end-of-life motorcycles requires advance approval by the Japan Automobile Recycling Promotion Center.

● COMMERCIAL VEHICLE RACK EQUIPMENT NOT COVERED BY THE END-OF-LIFE VEHICLE RECYCLING LAW

<p>Voluntary Recovery (from Cab-Type Vehicles)</p> <p>(Color code explains cost burden placement.)</p> <p>All equipment whose recovery is not mandated by law</p>	<p>Voluntary Recovery (from Single-Body Vehicles)</p> <p>(Color code explains cost burden placement.)</p> <p>Custom and other equipment</p>	<p>Vehicles Not Covered by the End-of-Life Vehicle Recycling Law</p>
<p>Cost Burden for Equipment Not Covered by the Law</p>	<p>The End-of-Life Vehicle Recycling Law does not cover some types of rack and custom equipment for commercial vehicles. Recovery costs through final disposal are therefore not included in the vehicle recycling fee but rather market-determined.</p>	
<p>Cost Burden for Equipment Covered by the Law</p>	<p>For all commercial vehicle rack equipment covered by the End-of-Life Vehicle Recycling Law, including single-body vehicle equipment (exclusive of custom equipment), the vehicle recycling fee covers the entire cost of recovery through final disposal.</p>	
<p>Van-type CVs such as:</p>	<p>Freezer trucks/vans, refrigerator trucks/vans, dry vans, etc.</p>	
<p>Tank-type CVs such as:</p>	<p>Tank trucks, cement mixers, waterspraying trucks, water-supply trucks, sewage removal trucks, etc.</p>	
<p>Hauling CVs such as:</p>	<p>Specialized hauling trucks, vehicle carriers, container trucks, lift-equipped vehicles, etc.</p>	
<p>Special-purpose CVs such as:</p>	<p>Special all-terrain vehicles, fire trucks, wreckers, pump trucks, ladder-equipped vehicles, etc.</p>	

● THE MOTORCYCLE RECYCLING FLOW

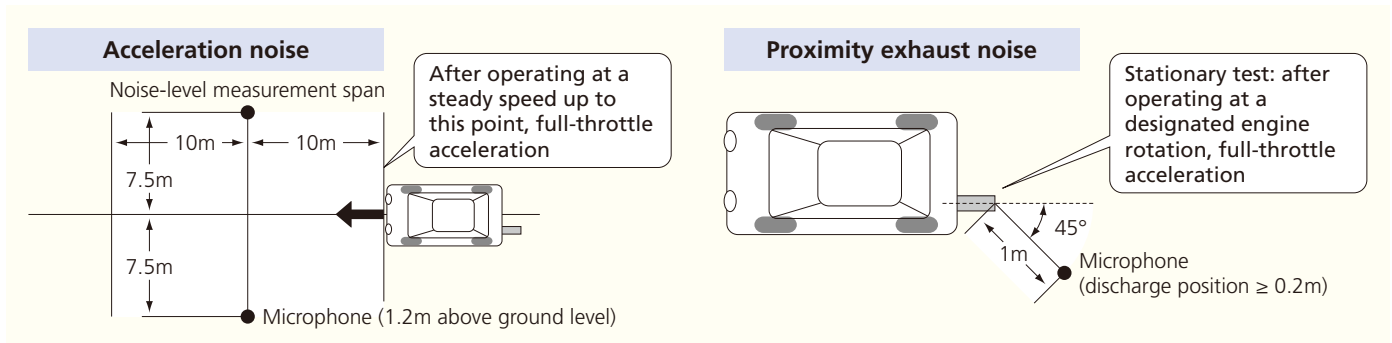


Note: The cost of ELV motorcycle delivery from ELV dealers to certified collection centers is financed by the motorcycle manufacturers on the basis of the consumer's recycling fee paid at the time of motorcycle purchase. Source: Japan Automobile Recycling Promotion Center

Further Progress in Reducing Automobile-Emitted Noise

Automobiles generate various kinds of noise, including the noise emitted by the engine, intake system, powertrain, and cooling and exhaust systems. Tires also generate tire-road noise. Automotive noise in Japan is regulated by standards—on acceleration noise, constant speed noise, and proximity exhaust noise—which have become progressively more stringent, requiring automakers to develop the technologies necessary for compliance. Although very significant progress has been made as a result of these efforts, the Japanese government is nevertheless updating its noise regulations in line with the results of studies conducted under the United Nations’ World Forum for Harmonization of Vehicle Regulations (WP.29). UN Regulation (or “UN R”) 41-04 has been enforced in Japan since January 2014 to regulate motorcycle acceleration noise. Since October 2016, UN R51-03 has been enforced for motor vehicle noise regulation, covering acceleration noise testing, proximity exhaust noise relative value regulation (to maintain new-model performance levels), and compressed air noise regulation (new to the Japanese market), and test methods have changed accordingly. Along with UN R117-02 regulating tire noise, UN R51-03 is expected to contribute greatly to automobile-emitted noise reduction. Moreover, to counter the quietness of electric and hybrid vehicles at low speeds, UN R138-01, which requires those vehicles to be equipped with a proximity warning system mainly for the protection of pedestrians, is to be enforced from March 2018.

PROCEDURES FOR TESTING MOTOR VEHICLE NOISE LEVELS



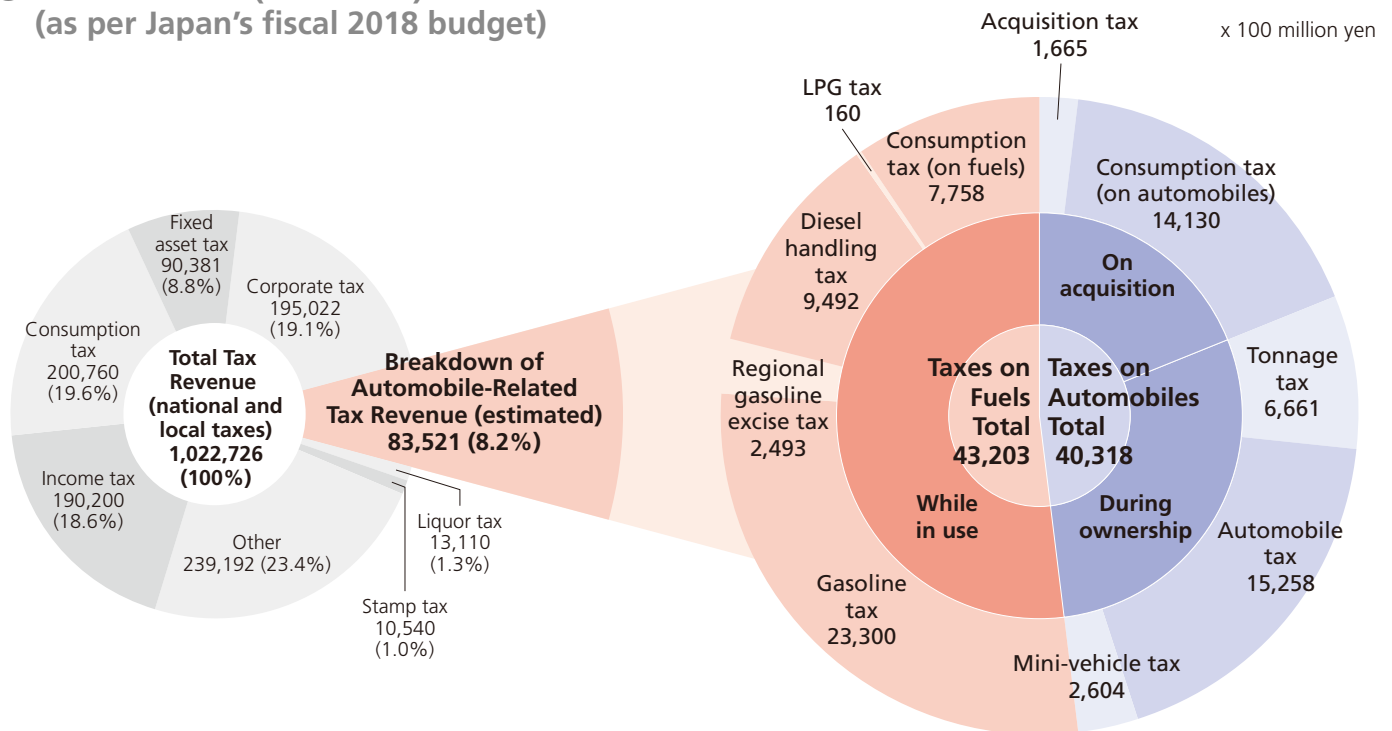
JAPAN'S SHIFT FROM DOMESTIC TO INTERNATIONALLY HARMONIZED MOTOR VEHICLE NOISE REGULATIONS

Year	1950	1960	1970	1980	1990	2000	2010	2020	2030	
	Japan's domestic regulations							Japan's internationally harmonized regulations (partial)		
Acceleration noise			1971 regulation (for new vehicles)	1976-1977 regulation	1979 regulation	1982-1987 regulation	1998-2001 regulation	UN R41-04 (for motorcycles)	UN R51-03 (for motor vehicles) (replacing 1998-2001 reg.)	Phase 1 Phase 2 Phase 3 (adoption undecided)
Constant speed noise	1951 regulation		1971 regulation				1998-2001 regulation			
Exhaust noise	1951 regulation		1971 regulation							
Proximity exhaust noise					1986-1989 regulation (replacing 1971 reg.)		1998-2001 regulation		Relative value regulation	
Compressed air noise									Compressed air noise regulation (UN R51-03)	

8 Trillion Yen in Annual Automobile-Related Tax Revenue

Since the initial earmarking of funds for road construction and road maintenance programs in line with Japan’s first five-year road improvement plan in 1954, there has been a steady increase both in the number of automobile-related taxes assessed on users and in their respective rates. Currently, the automobile tax structure consists of nine different taxes, creating a very heavy tax burden for motor vehicle owners in Japan. Under the government’s budget for fiscal 2018, the total value of tax revenue from these automobile-related taxes has been estimated at 8.4 trillion yen, or 8.2% of Japan’s projected total tax revenue of 102 trillion yen in fiscal 2018.

TAX REVENUE (Estimated) BY SOURCE IN FISCAL 2018 (as per Japan’s fiscal 2018 budget)



Notes: 1. Automobile-related consumption tax revenue is not included in the “Consumption tax” segment in the chart on the left, but is included in the breakdown of automobile-related tax revenue appearing in the chart on the right. 2. Automobile-related consumption tax revenue values (including the consumption tax revenue from automobile servicing, not shown but included in figures here) have been calculated by JAMA. 3. The consumption tax is a national sales tax, of which 1.7% of the revenue is redistributed as revenue to local governments. Sources: Ministry of Finance; Ministry of Internal Affairs and Communications

AUTOMOBILE-RELATED TAXES IN JAPAN (as of May 1, 2018)

Tax Category	On Acquisition		During Ownership
	Acquisition Tax	Consumption Tax	Tonnage Tax
How Assessed	Assessed on the acquisition of an automobile, whether new or used, based on the purchase price	Assessed on the purchase price of the automobile	Assessed according to vehicle weight at each mandatory vehicle inspection
National/Local Tax	Prefectural tax	National and local tax	National tax
Tax Rate/ Amount	(Private use) - 3% of purchase price (2% for commercial vehicles and mini-vehicles) - Exempted for vehicles purchased for ¥500,000 or less Note: For eco-friendly vehicles, reductions/exemptions apply to the acquisition tax (see pages 46-49).	8% (of which 1.7% is a local tax)	1) Only eco-friendly vehicles and new passenger cars (excluding minicars and hybrids) and small trucks and buses (GVW≤2.5t) compliant +10% with 2015 fuel efficiency standards, with emissions down by 75% from 2005 standards or by 50% from 2018 standards: ¥2,500/0.5t/year for private-use passenger cars (i.e., base rate) 2) Vehicles on the road 18 years or longer since first registration: ¥6,300/0.5t/year for private-use passenger cars 3) Vehicles on the road 13 years or longer since first registration: ¥5,700/0.5t/year for private-use passenger cars 4) Other vehicles for private use: - Passenger cars: ¥4,100/0.5t/year - Trucks (GVW>2.5t): ¥4,100/t/year; Trucks (GVW≤2.5t): ¥3,300/t/year - Buses: ¥4,100/t/year; Mini-vehicles: ¥3,300/year - Motorcycles (251cc and over): ¥1,900/year - Motorcycles (126 to 250cc): ¥4,900 upon registration Note: For eco-friendly vehicles, reductions/exemptions apply to the tonnage tax (see pages 46-49).

● JAPAN'S ESTIMATED AUTOMOBILE-RELATED TAX REVENUE IN FISCAL 2018

		Tax Revenue (x 100 million yen)		Base Tax Rate (for reference)	Current Tax Rate	Comparison with Base Tax Rate (multiplier value)
Taxes on Automobiles	On acquisition	Acquisition tax	1,665	3%	3% (Excluding commercial/mini-vehicles)	1.0
		Consumption tax (on automobiles)	14,130		8%	
	During ownership	Tonnage tax	6,661	¥2,500/0.5t/year (Vehicles for private use)	¥4,100/0.5t/year (Vehicles for private use)	1.6
		Automobile tax	15,258	Based on engine capacity (e.g., for 1,001≤1,500cc passenger cars, ¥34,500/year; see below)		
		Mini-vehicle tax	2,604	¥10,800/year (Passenger cars for private use)		
	Total	40,318				
Taxes on Fuels	While in use	Gasoline tax	23,300	¥24.3/ℓ	¥48.6/ℓ	2.0
		Regional gasoline excise tax	2,493	¥4.4/ℓ	¥5.2/ℓ	1.2
		Diesel handling tax	9,492	¥15.0/ℓ	¥32.1/ℓ	2.1
		LPG tax	160		¥17.5/kg	
		Consumption tax (on fuels)	7,758		8%	
		Total	43,203			
Grand Total			83,521			

Notes: 1. Consumption tax revenue values (including the consumption tax revenue from automobile servicing, not shown but included in figures here) have been calculated by JAMA. 2. Current tax rates effective as of May 1, 2018.

● TAX RATES IN EFFECT (Examples), 1954-2018, TO SUPPORT ROAD NETWORK IMPROVEMENTS

Duration	"Five-Year" Plan	Fiscal Year	Acquisition Tax	Tonnage Tax ¥/0.5t/year	Gasoline Tax ¥/ℓ	Regional Gasoline Excise Tax ¥/ℓ	Diesel Handling Tax ¥/ℓ	LPG Tax ¥/kg		
1954-57	First	'54 '55 '56 '57	[Commercial and mini- vehicles excluded]	[In the case of a passenger car for private use]	13.0					
1958-60	Second	'58			11.0	2.0		6.0		
		'59			14.8	3.5	8.0			
1961-63	Third	'61			19.2			10.4		
		'62			22.1	4.0	12.5			
1964-66	Fourth	'64 '66			3%	24.3	4.4	15.0		
1967-69	Fifth	'67 '68								
1970-72	Sixth	'70 '71				2,500			5	
1973-77	Seventh	'74 '76			5%	5,000 6,300	29.2 36.5 45.6	5.3 6.6 8.2	19.5 24.3	10
1978-82	Eighth	'79					48.6	5.2	32.1	
1983-87	Ninth									
1988-92	Tenth									
1993-97	Eleventh	'93								
1998-2002	Twelfth	'98								
2003-07	As per the national priority infrastructure development plan									
2008-	As per the national medium-term road infrastructure plan									
2010-11	—			6,300 5,000						
2012-17	—			4,100 (2,500)						
2018-	—		3%	4,100 (2,500*)	48.6	5.2	32.1	17.5		
Comparison with base tax rate (multiplier value)			1.00	1.64	2.00	1.18	2.14	1.00		

Base tax rate *The base tonnage tax rate (¥2,500/0.5t/year) is applied only to eco-friendly vehicles and new passenger cars (excluding minicars and hybrids) and small trucks and buses (GVW≤2.5t) compliant +10% with 2015 fuel efficiency standards, with emissions down by 75% from 2005 standards or by 50% from 2018 standards. Source: Japan Automobile Manufacturers Association

Automobile Tax	Mini-Vehicle Tax	While in Use				
		Gasoline Tax	Regional Gasoline Excise Tax	Diesel Handling Tax	LPG Tax	Consumption Tax
Fixed amount assessed on the owner each year as of April 1	Fixed amount assessed on the owner each year as of April 1	Assessed on gasoline		Assessed on light oil	Assessed on LPG	Assessed on the purchase price of fuels
		Included in the fuel price				
Prefectural tax	Municipal tax	National tax		Prefectural tax	National tax	National and local tax
Passenger cars (for private use) - Up to 1,000cc ¥29,500/year - 1,001 to 1,500cc ¥34,500/year - 1,501 to 2,000cc ¥39,500/year - 2,001 to 2,500cc ¥45,000/year - 2,501 to 3,000cc ¥51,000/year - 3,001 to 3,500cc ¥58,000/year - 3,501 to 4,000cc ¥66,500/year - 4,001 to 4,500cc ¥76,500/year - 4,501 to 6,000cc ¥88,000/year - Over 6,000cc ¥111,000/year Note: For some eco-friendly vehicles, reductions apply to the automobile tax (see page 49).	1) Mini-vehicles (for private use) - Passenger cars ¥10,800/year - Trucks ¥5,000/year Note: Above tax rates apply to new vehicles registered in or after fiscal 2015 and took effect from fiscal 2016. 2) Motorcycles - Up to 50cc ¥2,000/year - 51 to 90cc ¥2,000/year - 91 to 125cc ¥2,400/year - 126 to 250cc ¥3,600/year - 251cc and over ¥6,000/year Note: For some eco-friendly mini-vehicles, reductions apply to the mini-vehicle tax (see page 49).	¥48.6/ℓ	¥5.2/ℓ	¥32.1/ℓ (light oil)	¥17.5/kg (LPG)	8% of the purchase price of fuels (of which 1.7% is a local tax) [For light oil, imposed on the light oil price excluding the diesel handling tax]

Source: Japan Automobile Manufacturers Association

Tax Incentives to Promote the Wider Use of Eco-Friendly Vehicles

To help expedite the shift to low-carbon road transport in the interest of curbing global warming and to help improve air quality, the Japanese government has, since April 2009, applied auto-related tax incentives to promote the wider use of eco-friendly vehicles. New incentives and eligibility requirements came into effect beginning in April 2017. For passenger cars, updated incentives and eligibility requirements come into effect beginning in April 2018.









INCENTIVES & ELIGIBILITY REQUIREMENTS

● ACQUISITION AND TONNAGE TAX REDUCTIONS/EXEMPTIONS

Period in effect: April 1, 2017 through March 31, 2019 for the acquisition tax; May 1, 2017 through April 30, 2019 for the tonnage tax.








Alternative-Energy Vehicles Passenger Cars; Small, Mid-Sized & Heavy-Duty Trucks and Buses	Electric vehicles/Fuel cell vehicles/Plug-in hybrid vehicles/ Clean diesel passenger cars (1)/Natural gas vehicles (2)		
	Acquisition Tax	New vehicles	Exempt
		Used vehicles	¥450,000 deduction
Tonnage Tax		Exempt on initial inspection mandated for new vehicle purchase and at time of first vehicle inspection post-purchase	

(1) Only vehicles complying with 2009 or 2018 emission standards. (2) With NOx emissions down by 10% from 2009 emission standards, or complying with 2018 emission standards.

Passenger Cars Gasoline vehicles/ LPG vehicles (including hybrids)	 or 					
	 Compliant +40% with 2020 fuel efficiency standards	 Compliant +30% with 2020 fuel efficiency standards	 Compliant +20% with 2020 fuel efficiency standards	 Compliant +10% with 2020 fuel efficiency standards	 Compliant with 2020 fuel efficiency standards	 Compliant +10% with 2015 fuel efficiency standards
Acquisition Tax	New vehicles	Exempt	60% reduction	40% reduction	20% reduction	
	Used vehicles	¥450,000 deduction	¥250,000 deduction	¥150,000 deduction	¥50,000 deduction	
Tonnage Tax		Exempt*	75% reduction	50% reduction	25% reduction	

*For vehicles compliant +40% with 2020 fuel efficiency standards, exemption applies on initial inspection mandated for new vehicle purchase and at time of first vehicle inspection post-purchase; for vehicles compliant +30% with 2020 fuel efficiency standards, exemption applies only on initial inspection mandated for new vehicle purchase.

Note: Incentives and eligibility requirements as shown in the above chart in effect from April 1, 2017 through March 31, 2018 for the acquisition tax, and from May 1, 2017 through April 30, 2018 for the tonnage tax; updated incentives and eligibility requirements for passenger cars in effect beginning in April 2018 (see page 48).

Small Trucks and Buses (GVW≤2.5t) Gasoline vehicles (including hybrids)	 or 					
	 Compliant +25% with 2015 fuel efficiency standards	 Compliant +20% with 2015 fuel efficiency standards	 Compliant +15% with 2015 fuel efficiency standards	 Compliant +10% with 2015 fuel efficiency standards	 Compliant +5% with 2015 fuel efficiency standards	
Acquisition Tax	New vehicles	Exempt	80% reduction	60% reduction	40% reduction	20% reduction
	Used vehicles	¥450,000 deduction	¥350,000 deduction	¥250,000 deduction	¥150,000 deduction	¥50,000 deduction
Tonnage Tax		Exempt*	75% reduction	50% reduction	25% reduction	

*Exemption applies on initial inspection mandated for new vehicle purchase and at time of first vehicle inspection post-purchase.
















Fuel consumption and exhaust emission requirements shown here are JC08 test cycle-based. For the purpose of assessing the acquisition tax on used passenger cars and on used small trucks and buses (GVW≤2.5t) whose certified fuel efficiency was measured in the old 10-15-mode test cycle, the equivalence of JC08 test cycle-obtained fuel efficiency values to the 10-15-mode test cycle as listed in the two charts below is applied.

For passenger cars:











JC08 Test Cycle-Obtained Fuel Efficiency Value	Equivalence to the 10-15-Mode Test Cycle
Compliant +40% with 2020 fuel efficiency standards	= Compliant +110% with 2010 fuel efficiency standards
Compliant +30% with 2020 fuel efficiency standards	= Compliant +95% with 2010 fuel efficiency standards
Compliant +20% with 2020 fuel efficiency standards	= Compliant +80% with 2010 fuel efficiency standards
Compliant +10% with 2020 fuel efficiency standards	= Compliant +65% with 2010 fuel efficiency standards
Compliant with 2020 fuel efficiency standards	= Compliant +50% with 2010 fuel efficiency standards
Compliant +20% with 2015 fuel efficiency standards	= Compliant +50% with 2010 fuel efficiency standards
Compliant +10% with 2015 fuel efficiency standards	= Compliant +38% with 2010 fuel efficiency standards

For small trucks and buses (GVW≤2.5t):







JC08 Test Cycle-Obtained Fuel Efficiency Value	Equivalence to the 10-15-Mode Test Cycle
Compliant +25% with 2015 fuel efficiency standards	= Compliant +57% with 2010 fuel efficiency standards
Compliant +20% with 2015 fuel efficiency standards	= Compliant +50% with 2010 fuel efficiency standards
Compliant +15% with 2015 fuel efficiency standards	= Compliant +44% with 2010 fuel efficiency standards
Compliant +10% with 2015 fuel efficiency standards	= Compliant +38% with 2010 fuel efficiency standards
Compliant +5% with 2015 fuel efficiency standards	= Compliant +32% with 2010 fuel efficiency standards

Mid-Sized Trucks and Buses (2.5t<GVW≤3.5t)		 or  Emissions down by 75% from 2005 standards		 or  Emissions down by 50% from 2005 standards		 or  Emissions down by 25% from 2018 standards		 or  Emissions down by 75% from 2005 standards		 or Emissions down by 50% from 2005 standards		or Emissions down by 25% from 2018 standards			
		Gasoline vehicles (including hybrids)		 Compliant +15% with 2015 fuel efficiency standards		 Compliant +10% with 2015 fuel efficiency standards		 Compliant +15% with 2015 fuel efficiency standards		 Compliant +10% with 2015 fuel efficiency standards		 Compliant +5% with 2015 fuel efficiency standards		 Compliant with 2015 fuel efficiency standards	
Acquisition Tax	New vehicles	Exempt	75% reduction		50% reduction		25% reduction								
	Used vehicles	¥450,000 deduction	¥350,000 deduction		¥250,000 deduction		¥150,000 deduction								
Tonnage Tax		Exempt*	75% reduction		50% reduction		25% reduction								

*Exemption applies on initial inspection mandated for new vehicle purchase and at time of first vehicle inspection post-purchase.

Mid-Sized Trucks and Buses (2.5t<GVW≤3.5t)		 or  NOx and PM emissions down by 10% from 2009 standards		Compliant with 2018 emission standards		Compliant with 2009 emission standards		 or  NOx and PM emissions down by 10% from 2009 standards		Compliant with 2018 emission standards		Compliant with 2009 emission standards			
		Diesel vehicles (including hybrids)		 Compliant +15% with 2015 fuel efficiency standards		 Compliant +10% with 2015 fuel efficiency standards		 Compliant +15% with 2015 fuel efficiency standards		 Compliant +10% with 2015 fuel efficiency standards		 Compliant +5% with 2015 fuel efficiency standards		 Compliant with 2015 fuel efficiency standards	
Acquisition Tax	New vehicles	Exempt	75% reduction		50% reduction		25% reduction								
	Used vehicles	N/A	N/A		N/A		N/A								
Tonnage Tax		Exempt*	75% reduction		50% reduction		25% reduction								

N/A: Not applicable. *Exemption applies on initial inspection mandated for new vehicle purchase and at time of first vehicle inspection post-purchase.








Heavy-Duty Trucks and Buses (GVW>3.5t)		 or  NOx and PM emissions down by 10% from 2009 standards						
		 Compliant +15% with 2015 fuel efficiency standards		 Compliant +10% with 2015 fuel efficiency standards		 Compliant +5% with 2015 fuel efficiency standards		 Compliant with 2015 fuel efficiency standards
Acquisition Tax	New vehicles	Exempt	75% reduction		50% reduction		25% reduction	
	Used vehicles (hybrid vehicles only)	¥450,000 deduction	¥350,000 deduction		¥250,000 deduction		¥150,000 deduction	
Tonnage Tax		Exempt*	75% reduction		50% reduction		25% reduction	

*Exemption applies on initial inspection mandated for new vehicle purchase and at time of first vehicle inspection post-purchase.

Notes concerning the charts on pages 46 and 47: 1. Acquisition tax reductions/exemptions are applied on initial inspection mandated for new vehicle purchase during the period in which the above reductions/exemptions are in effect; for used vehicles, deductions are made from vehicles' purchase price and the acquisition tax is assessed on the amount remaining after deduction. 2. Tonnage tax reductions are applied on initial inspection mandated for new vehicle purchase during the period in which the above reductions/exemptions are in effect. 3. Vehicles complying with or surpassing the fuel efficiency standards stipulated in Japan's Energy Conservation Law are identified with appropriately coded stickers. 4. Vehicles complying with or surpassing emission standards are certified by Japan's Ministry of Land, Infrastructure, Transport and Tourism.







● ACQUISITION AND TONNAGE TAX REDUCTIONS/EXEMPTIONS

For passenger cars, the following updated incentives and eligibility requirements come into effect beginning in April 2018.

Passenger Cars Gasoline vehicles/ LPG vehicles (including hybrids)		 or  Emissions down by 75% from 2005 standards Emissions down by 50% from 2018 standards				
		 Compliant +50% with 2020 fuel efficiency standards	 Compliant +40% with 2020 fuel efficiency standards	 Compliant +30% with 2020 fuel efficiency standards	 Compliant +20% with 2020 fuel efficiency standards	 Compliant +10% with 2020 fuel efficiency standards
Acquisition Tax	New vehicles	Exempt	80% reduction	60% reduction	40% reduction	20% reduction
	Used vehicles	¥450,000 deduction	¥350,000 deduction	¥250,000 deduction	¥150,000 deduction	¥50,000 deduction
Tonnage Tax		Exempt*	75% reduction	50% reduction	25% reduction	

*For vehicles compliant +50% with 2020 fuel efficiency standards, exemption applies on initial inspection mandated for new vehicle purchase and at time of first vehicle inspection post-purchase.
 Notes: 1. Incentives and eligibility requirements as shown in the above chart in effect from April 1, 2018 through March 31, 2019 for the acquisition tax, and from May 1, 2018 through April 30, 2019 for the tonnage tax. (For incentives and eligibility requirements for alternative-energy passenger cars, see page 46.) 2. For used vehicles, deductions are made from vehicles' purchase price and the acquisition tax is assessed on the amount remaining after deduction.

Passenger cars meeting the following performance criteria are not covered by the tax incentives for eco-friendly vehicles shown on pages 46-48, but when they undergo the initial inspection mandated for new vehicle purchase during the relevant "period in effect" stipulated below, they will be eligible for a tonnage tax reduction, in that the "base tax rate" rather than the (higher) "current tax rate" for the tonnage tax will be assessed on them (see page 45).

Period in Effect	Emissions Performance Criteria	Fuel Efficiency Performance Criteria
May 1, 2017 through April 30, 2018	 or  Emissions down by 75% from 2005 standards Emissions down by 50% from 2018 standards	 Compliant +5% with 2015 fuel efficiency standards
May 1, 2018 through April 30, 2019	 or  Emissions down by 75% from 2005 standards Emissions down by 50% from 2018 standards	 Compliant +10% with 2015 fuel efficiency standards

Notes: 1. The provisions shown in the above chart were established in Japan's 2017 revised tax regimen and apply to qualifying passenger cars (excluding minicars and hybrids) only once, on initial inspection mandated for new vehicle purchase. Prior to the establishment of these provisions, the "current tax rate" for the tonnage tax was assessed on vehicles not covered by the tax incentives for eco-friendly vehicles. 2. Example of the amount assessed when the base tonnage tax rate is applied over a three-year period in the case of a qualifying 1.5-ton passenger car for private use: ¥22,500 (as opposed to the ¥36,900 assessed at the "current tax rate").

● ADDITIONAL ACQUISITION AND TONNAGE TAX REDUCTIONS/EXEMPTIONS (For Vehicles Equipped with Advanced Safety Features [ASVs] and Public-Use Assisted-Mobility Vehicles [AMVs])

Period in effect (ASVs) : April 1, 2018 through March 31, 2019 for the acquisition tax; May 1, 2018 through April 30, 2021 for the tonnage tax.
Period in effect (AMVs): April 1, 2017 through March 31, 2019 for the acquisition tax; May 1, 2018 through March 31, 2021 for the tonnage tax.

Vehicle Type		Reductions/Exemptions	
		Acquisition Tax	Tonnage Tax
ASVs equipped with one of three systems	Collision-mitigation braking system	¥3.5 million deduction from purchase price (1), (3)	50% reduction (1), (2)
	Electronic stability control system		
	Lane departure warning system	¥1.75 million deduction from purchase price (1), (3)	25% reduction (1), (2)
ASVs equipped with more than one of the above systems		Up to ¥5.25 million deduction from purchase price (1), (3)	Up to 75% reduction (1), (2)
AMVs	Low-floor ("non-step") buses (for use in public transport)	¥10 million deduction from purchase price (3)	Exempt (2)
	Buses equipped with an electric lift (for use in public transport)	· For large buses (occupancy≥30 persons), ¥6.5 million deduction from purchase price (3) · For small buses (occupancy<30 persons), ¥2 million deduction from purchase price (3)	Exempt (2)
	Universal design-based taxis (for use in public transport)	¥1.0 million deduction from purchase price (3)	Exempt (2)

(1) Eligible vehicles are trucks (3.5t<GVW≤22t) and buses (including 10-person occupancy vehicles); buses with GVW>12t are required to be equipped with a lane departure warning system; electronic stability control systems are not included in the eligibility requirements for buses with GVW<5t. (2) Applied once, on initial inspection mandated for new vehicle purchase. (3) Applied once, at the time of new vehicle registration.

Notes: 1. The acquisition tax is assessed on the amount remaining after deduction. 2. When vehicles targeted by this scheme are also covered by the eco-friendly vehicle tax incentives scheme (see pages 46 and 47), vehicle owners can opt either for one of the acquisition tax deductions shown here or for one of the acquisition tax reductions/exemptions prescribed in the eco-friendly vehicle tax incentives scheme. 3. When vehicles targeted by this scheme are also covered by the eco-friendly vehicle tax incentives scheme, the most favorable tonnage tax incentive between the two schemes is applied; when the tonnage tax incentive is identical in both schemes, it is implemented under the eco-friendly vehicle tax incentives scheme.

● FISCAL 2017 & 2018 AUTOMOBILE TAX REDUCTIONS (Passenger Cars and Trucks & Buses)

Requirements		Reduction
Passenger Cars	Electric vehicles/Fuel cell vehicles/Plug-in hybrid vehicles/Clean diesel passenger cars (1)/Natural gas vehicles (2) Compliant +30% with 2020 fuel efficiency standards, with emissions down by 75% from 2005 standards or down by 50% from 2018 standards	75% reduction (4)
	Compliant +10% with 2020 fuel efficiency standards, with emissions down by 75% from 2005 standards or down by 50% from 2018 standards	50% reduction (4)
Trucks & Buses	Electric vehicles/Fuel cell vehicles/Plug-in hybrid vehicles/Natural gas vehicles (3)	75% reduction (4)

(1) Only vehicles complying with 2009 emission standards. (2) With NOx emissions down by 10% from 2009 emission standards. (3) With NOx emissions down by 10% from 2009 emission standards, or complying with 2018 emission standards. (4) Reductions effective on initial inspection mandated for new vehicle purchase are applied in the fiscal year following the year of purchase.

Note: This scheme also mandates a yearly 15% (10% for trucks and buses) surcharge on the automobile tax for gasoline and LPG-powered vehicles on the road 13 years or longer, and for diesel vehicles on the road 11 years or longer, since first registration; electric vehicles, fuel cell vehicles, natural gas vehicles, methanol vehicles, gasoline hybrid vehicles, public transport buses and trailers are exempt.

● FISCAL 2017 & 2018 MINI-VEHICLE TAX REDUCTIONS (Minicars and Mini-Trucks) *

Requirements		Reduction
Minicars	Electric vehicles/Fuel cell vehicles/Natural gas vehicles (1)	75% reduction (2)
	Compliant +30% with 2020 fuel efficiency standards, with emissions down by 75% from 2005 standards or down by 50% from 2018 standards	50% reduction (2)
	Compliant +10% with 2020 fuel efficiency standards, with emissions down by 75% from 2005 standards or down by 50% from 2018 standards	25% reduction (2)
Mini-Trucks	Electric vehicles/Fuel cell vehicles/Natural gas vehicles (1)	75% reduction (2)
	Compliant +35% with 2015 fuel efficiency standards, with emissions down by 75% from 2005 standards or down by 50% from 2018 standards	50% reduction (2)
	Compliant +15% with 2015 fuel efficiency standards, with emissions down by 75% from 2005 standards or down by 50% from 2018 standards	25% reduction (2)

*Applies only to three- or four-wheeled mini-vehicles at the time of new vehicle registration.

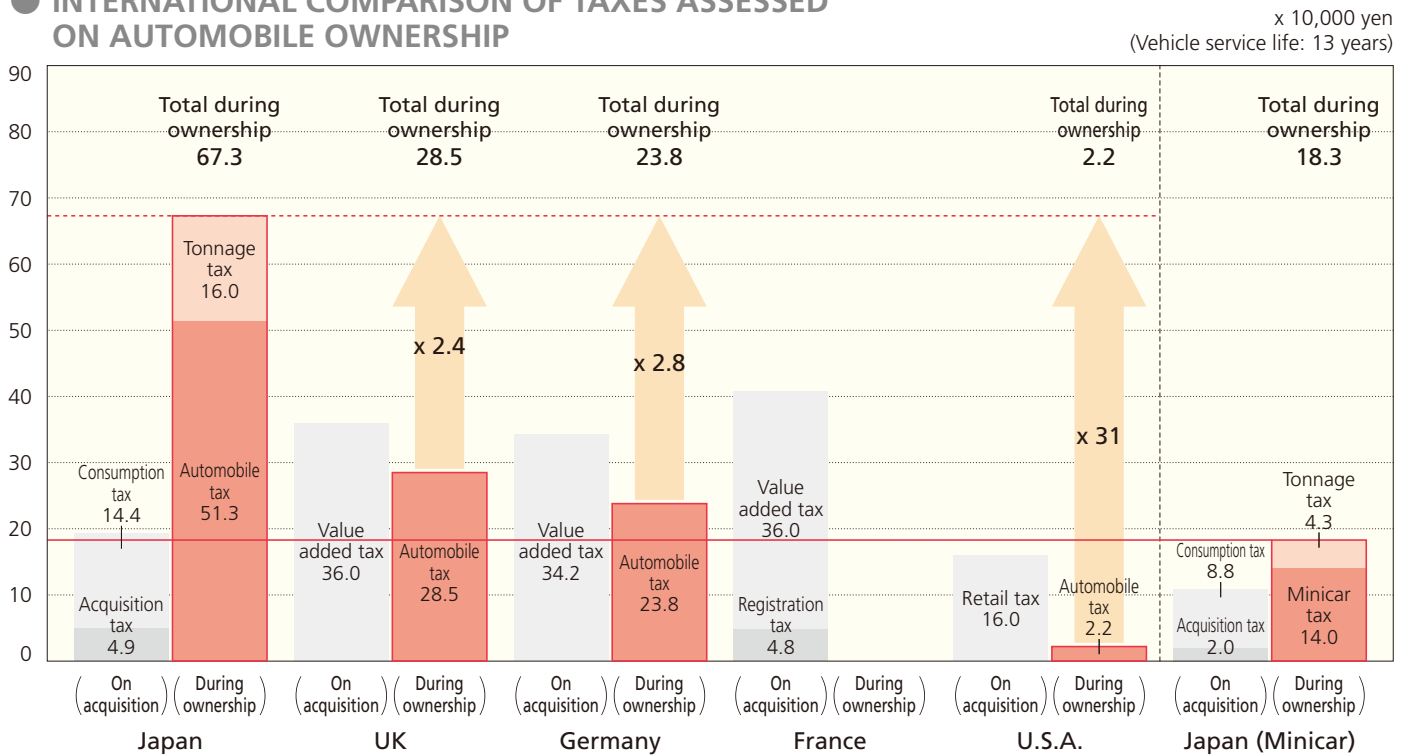
(1) With NOx emissions down by 10% from 2009 emission standards, or complying with 2018 emission standards. (2) Reductions effective on initial inspection mandated for new vehicle purchase are applied in the fiscal year following the year of purchase.

Note: This scheme also mandates a yearly 20% surcharge on the mini-vehicle tax for mini-vehicles on the road 13 years or longer since first registration; electric vehicles, fuel cell vehicles, natural gas vehicles, methanol vehicles, gasoline hybrid vehicles and trailers are exempt.

Automobile-Related Taxes Are Onerous

Consider the case of a passenger car costing 1.8 million yen when purchased new and providing 13 years of service to the original owner for private use. During that period, six different categories of taxes (including consumption tax at the time of vehicle purchase and on fuel) will be assessed on the owner/user, amounting to a grand total of roughly 1.7 million yen. In addition to these various taxes, the user will also be required to pay onerous expressway tolls, automobile insurance premiums (mandatory and optional), a recycling fee, periodic inspection fees, and maintenance costs.

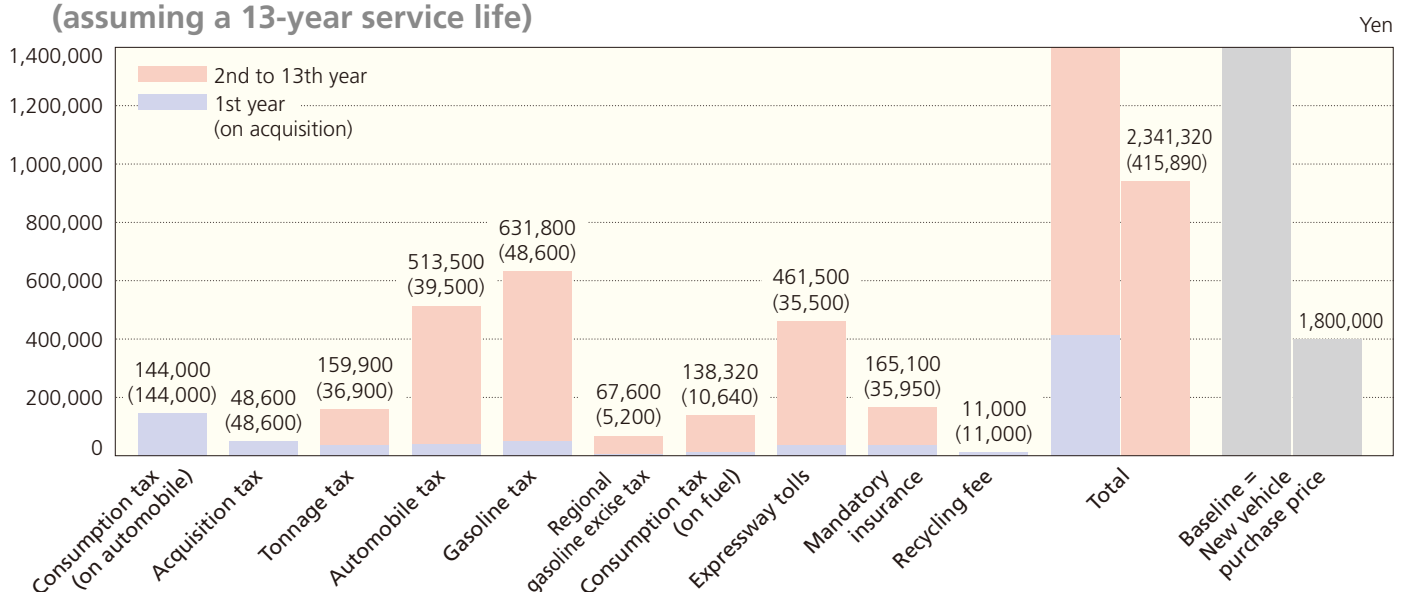
INTERNATIONAL COMPARISON OF TAXES ASSESSED ON AUTOMOBILE OWNERSHIP



Assumptions: 1) Engine capacity: 1800cc. 2) GVW≤1.5t. 3) Purchase price: ¥1.8 million (¥1.1 million for a minicar). 4) Fuel consumption (JC08 test cycle-based): 15.8km/l (CO₂ emissions: 147g/km). 5) France = Paris; U.S.A. = New York City. 6) France: Vehicle in no. 8 horsepower "class." 7) Service life: 13 years. 8) Currency exchange rates: EUR 1 = JPY 131, GBP 1 = JPY 151, USD 1 = JPY 112 (averaged April 2017-March 2018).

Notes: 1. Figures here are based on tax rates in effect in April 2018. 2. Figures here do not take into account applicable incentives/surcharges, such as tax incentives for eco-friendly vehicles in Japan, if any. Source: Japan Automobile Manufacturers Association

TAXES ASSESSED ON PASSENGER CAR OWNERSHIP AND USE (PRIVATE) IN JAPAN (assuming a 13-year service life)



Assumptions: 1) A passenger car with 1800cc engine capacity and purchase price of ¥1.8 million (retail price, excluding consumption tax). 2) GVW≤1.5t. 3) Annual fuel consumption: 1,000 liters. 4) Tonnage tax imposed yearly, but collected only at time of mandatory vehicle inspection. 5) Tax amounts reflect rates in effect from April 1, 2018. 6) Consumption tax = 8% of retail price. 7) The recycling fee indicated is the average rate for a 1800cc passenger car.

Notes: 1. Estimated expressway tolls, mandatory insurance premium payments and recycling fee are included here because they can be considered similar to taxes. (Mandatory insurance premium values indicated in effect at April 1, 2018.) 2. Value of expressway tolls was estimated by JAMA based on expressway toll revenue in 2016. Source: Japan Automobile Manufacturers Association

82.3 Million People Hold Driver's Licenses

At the end of 2017 there were nearly 82.3 million people, or 45.1 million men and 37.1 million women, holding valid driver's licenses in Japan. The number of driver's licenses held totalled 127.5 million (with one count allotted to each vehicle category covered, whenever a license covers multiple vehicle categories). By license category, Class 2 licenses were held by 2.08 million people, or 2.01 million men and 0.06 million women, and Class 1 licenses by 125.4 million people, or 80.60 million men and 44.78 million women.

● GENDER TRENDS IN DRIVER'S LICENSE HOLDERS (at end of every calendar year) Number of persons

Year	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Men	45,517,585	45,539,419	45,487,010	45,448,263	45,437,260	45,463,791	45,430,245	45,344,259	45,255,994	45,133,771
Women	34,930,257	35,272,526	35,523,236	35,767,003	36,050,586	36,396,221	36,645,978	36,805,749	36,949,917	37,121,424
Total	80,447,842	80,811,945	81,010,246	81,215,266	81,487,846	81,860,012	82,076,223	82,150,008	82,205,911	82,255,195

● TOTAL NUMBER OF LICENSES HELD, BY YEAR & LICENSE/VEHICLE CATEGORY Number of licenses held

Year		2011	2012	2013	2014	2015	2016	2017
Class 2 Licenses	Large motor vehicle	1,046,361	1,026,180	1,007,743	986,518	964,383	942,526	919,242
	Middle-category motor vehicle	1,081,474	1,042,120	1,002,043	960,304	917,142	873,879	1,055,123
	Ordinary motor vehicle	208,060	214,555	220,403	224,823	229,494	234,070	13,318
	Large special-purpose vehicle	46,055	45,463	45,041	44,330	43,605	42,997	42,302
	Traction vehicle	51,716	51,035	50,473	49,665	48,844	48,134	47,325
	Subtotal	2,433,666	2,379,353	2,325,703	2,265,640	2,203,468	2,141,606	2,077,310
Class 1 Licenses	Large motor vehicle	5,375,268	5,337,727	5,299,480	5,253,880	5,198,185	5,143,533	5,086,713
	Middle-category motor vehicle	72,814,101	72,070,665	71,409,459	70,632,500	69,732,685	68,813,808	67,870,730
	Quasi-middle-category motor vehicle	—	—	—	—	—	—	11,739,992
	Ordinary motor vehicle	5,550,718	6,749,966	7,936,169	9,113,940	10,297,590	11,473,646	905,528
	Large special-purpose vehicle	2,443,687	2,454,123	2,465,978	2,473,823	2,476,598	2,475,520	2,471,164
	Traction vehicle	1,152,732	1,160,509	1,168,205	1,174,267	1,178,790	1,182,806	1,187,003
	Large two-wheeler	11,197,903	10,938,930	10,703,691	10,430,075	10,112,584	9,799,816	9,466,072
	Ordinary two-wheeler	9,154,873	9,310,786	9,472,692	9,619,692	9,752,541	9,877,616	9,994,091
	Small special-purpose vehicle	532,892	503,338	477,296	450,123	422,020	394,952	367,603
	Motorized bicycle	17,075,472	16,977,729	16,905,848	16,784,700	16,618,061	16,450,534	16,291,972
Subtotal	125,297,646	125,503,773	125,838,818	125,933,000	125,789,054	125,612,231	125,380,868	
Total	127,731,312	127,883,126	128,164,521	128,198,640	127,992,522	127,753,837	127,458,178	

Note: In the above figures, one count is allotted to each vehicle category covered, whenever a license covers multiple vehicle categories.

● CLASS 1 LICENSES AND THE VEHICLE CATEGORIES THEY COVER

Vehicle Category	Class 1 Licenses									
	Large motor vehicle	Middle-category motor vehicle	Quasi-middle-category motor vehicle	Ordinary motor vehicle	Large special-purpose vehicle	Large two-wheeler	Ordinary two-wheeler	Ordinary two-wheeler (51cc-125cc)	Small special-purpose vehicle	Motorized bicycle
Large motor vehicle	●									
Middle-category motor vehicle	●	●								
Quasi-middle-category motor vehicle	●	●	●							
Ordinary motor vehicle	●	●	●	●						
Large special-purpose vehicle					●					
Large two-wheeler (over 400cc)						●				
Ordinary two-wheeler	126cc-400cc					●	●			
	51cc-125cc					●	●	●		
Small special-purpose vehicle	●	●	●	●	●	●	●	●	●	
Motorized bicycle (50cc & under)	●	●	●	●	●	●	●	●		●





Note: The ordinary motor vehicle and large two-wheeler license categories include licenses restricted to automatic transmission (AT) cars/motorcycles; the ordinary two-wheeler license category includes licenses restricted, respectively, to AT motorcycles, to small-sized (over 250cc) motorcycles, and to small-sized AT motorcycles.

Source for all statistical data on this page: National Police Agency

Assisted-Mobility Vehicles Provide Freedom of Movement

Assisted-mobility vehicles provide a comfortable and convenient means of displacement for people with otherwise limited mobility, such as elderly persons and the physically disabled, and are increasingly gaining recognition as meeting a significant need. They also play an essential role in the provision of public transportation services for all users. Japan's automakers have been working to enhance the convenience of assisted-mobility vehicles and thereby provide their users with optimal-quality mobility.

TYPES OF ASSISTED-MOBILITY VEHICLES

Vehicle Type	Vehicle Feature	Description	
Nursing care	Wheelchair-accessible (with ramp or lift)	Equipped with a ramp or an electrically-operated lift that allows boarding/deboarding while remaining seated in a wheelchair. Some types of ramps are operated electrically.	 
	Elevator seat	Equipped with a powered passenger or rear seat that, once rotated and slid out to the exterior, can be lowered to adjustable positions for easy boarding/exiting. Assists those who have considerable difficulty in boarding/exiting as well as wheelchair users.	
	Revolving seats Revolving sliding seats Revolving tilting seats	Passenger and rear seats can be rotated, rotated and slid out, or rotated and tilted to the exterior. Helpful for those who have a little difficulty in boarding/exiting.	
Self-operating	Drive-assist system	Equipped with drive-assist devices, such as a left-foot accelerator and hand/foot-operated equipment, so that it can be driven by the physically disabled.	
Other	Assisted-mobility bus	A "non-step" bus equipped with an electric lift or ramp allowing boarding/deboarding while seated in a wheelchair. Their use in local intra-community transport is being promoted.	

TRENDS IN ASSISTED-MOBILITY VEHICLE SALES

In vehicle units

Fiscal Year	2013	2014	2015	2016	2017
Standard & Small Vehicles	24,366	25,004	23,398	24,380	23,040
Chg. (%)	97.0	102.6	93.6	104.2	94.5
Wheelchair-accessible vehicles	13,196	14,013	13,525	14,493	14,455
Vehicles with elevator seats	10,209	10,065	7,454	6,217	5,451
Vehicles with revolving seats	—	—	1,552	2,838	2,245
Vehicles with drive-assist systems	471	552	427	370	264
Wheelchair vans (multiple capacity)	490	374	440	462	625
Mini-Vehicles	15,471	18,560	15,837	13,796	14,446
Chg. (%)	110.2	120.0	85.3	87.1	104.7
Wheelchair-accessible vehicles	12,954	14,487	12,705	11,112	11,444
Vehicles with elevator seats	2,474	4,055	2,848	2,491	2,748
Vehicles with revolving seats	—	—	273	193	254
Vehicles with drive-assist systems	43	18	11	0	0
Buses	4,352	4,305	5,510	6,308	6,008
Chg. (%)	109.9	98.9	128.0	114.5	95.2
Total	44,189	47,869	44,745	44,484	43,494
Chg. (%)	102.5	108.3	93.5	99.4	97.8

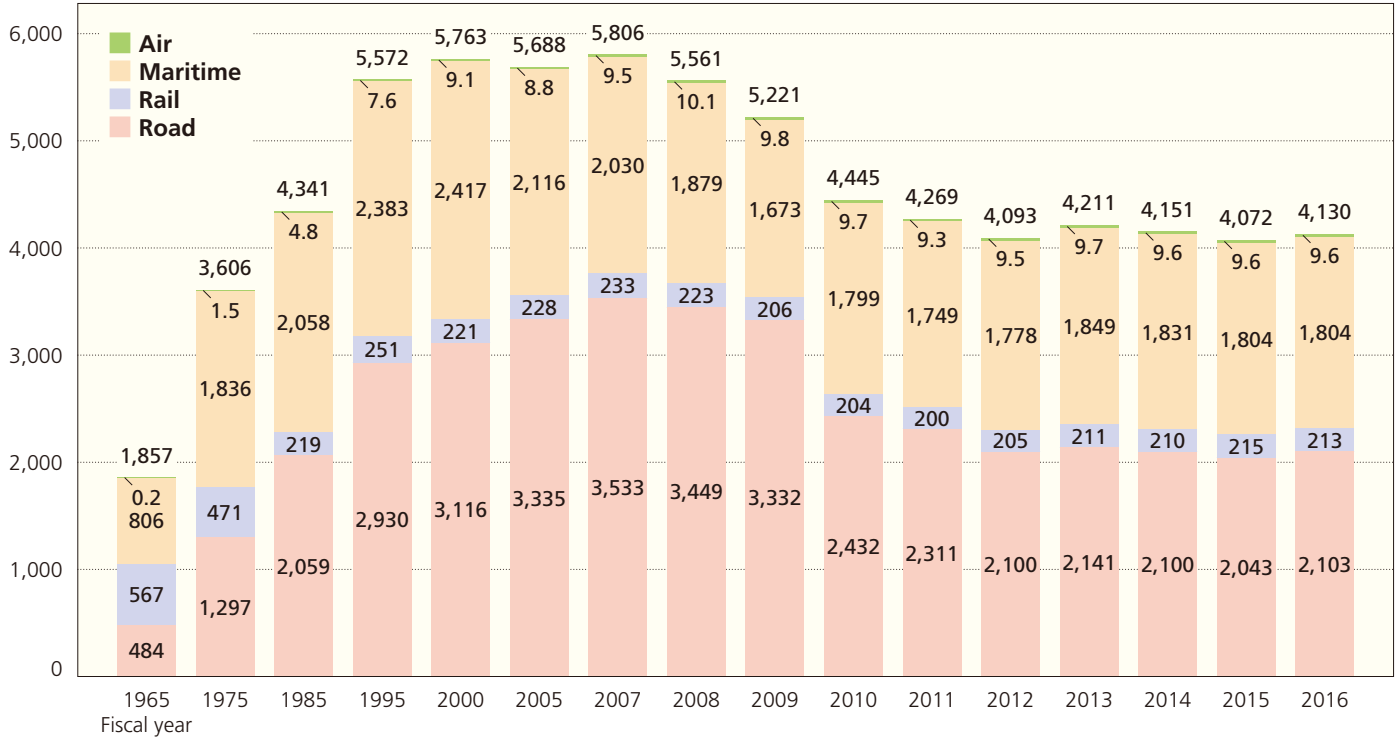
Notes: 1. JAMA member manufacturers provided the unit sales figures here, which do not include vehicles customized post-purchase. 2. Buses include minibuses. 3. "Standard & Small Vehicles" includes passenger cars and van-type commercial vehicles; definitions for "standard" and "small" vehicles here differ from those in Japan's Road Vehicles Act. 4. Vehicles with elevator seats and vehicles with revolving seats have been calculated separately since 2015; figures for "Vehicles with elevator seats" prior to 2015 include vehicles with revolving seats. 5. "Chg. (%)" means change from the previous year (with the previous year's result indexed at 100). Source: Japan Automobile Manufacturers Association

Motor Vehicles Are Vital to Goods Distribution

Accounting at present for 50% of Japan's total freight transport, road transportation plays an essential role in goods distribution. The role of motor vehicles in freight transport, especially small cargo transport, will become even more significant in the years ahead.

TRENDS IN DOMESTIC FREIGHT TRANSPORT VOLUMES, BY MODE

x 100 million tons/km



Notes: 1. Since 1987, "Road" includes transport by mini-vehicles. 2. Survey and calculation methods for "Road" data changed in 2010. 3. "Road" figures for fiscal 2010 (ending March 31, 2011) and 2011 do not include March and April 2011 data from the Tohoku region and Hokkaido as a consequence of the March 11, 2011 earthquake. Sources: Ministry of Land, Infrastructure, Transport and Tourism, etc.

Automobile Customs Tariffs

After repeated reductions in tariff rates, import tariffs in Japan on finished motor vehicles and major auto components were completely abolished in 1978. Other countries continue to impose tariffs on imported vehicles: for example, the United States imposes a 25% tariff on imported trucks; the EU's tariffs on finished vehicles range from 10% to 22% (the status of EU-imposed tariffs will change for Japan with the enforcement of the economic partnership agreement between Japan and the EU, negotiations over which were successfully concluded in December 2017); and China's tariffs on finished vehicles range from 15% to 25%.

AUTOMOBILE CUSTOMS TARIFFS, JAPAN/U.S.A./EU/CHINA

As of February 2018

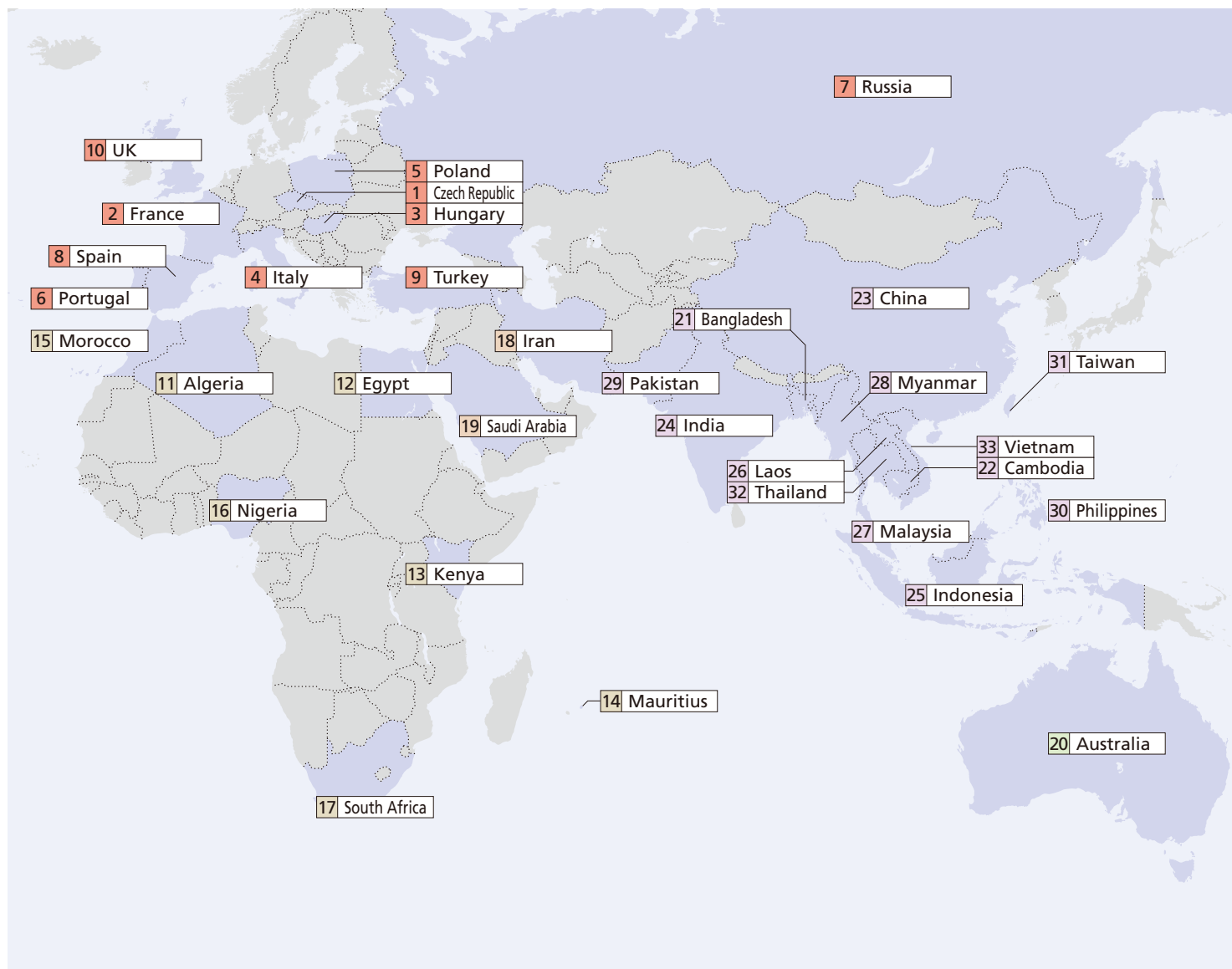
	Japan	U.S.A.	EU	China
Passenger Cars	None	2.5%	10%	25%
Trucks	None	25% Cab chassis, from 5t up to 20t in GVW 4%	Gasoline trucks, over 2800cc Diesel trucks, over 2500cc 22% Gasoline trucks, 2800cc or under Diesel trucks, 2500cc or under 10%	Trucks, under 5t in GVW 25% Gasoline trucks, 5t or greater in GVW Diesel trucks, from 5t up to 20t in GVW 20% Diesel trucks, 20t or greater in GVW 15%
Buses	None	Vehicles for the transport of 10 or more persons, incl. the driver 2%	Vehicles for the transport of 10 or more persons, incl. the driver Gasoline buses, over 2800cc Diesel buses, over 2500cc 16% Gasoline buses, 2800cc or under Diesel buses, 2500cc or under 10%	25%
Components, etc.	Major components: None	Bodies, parts and accessories ... 2.5%	Bodies, parts and accessories 3-4.5%	Major components 6-10%

Sources: Customs tariff schedules of countries/region concerned

Global Manufacturing Operations Expand Their Range

Japanese automobile manufacturers have continued to develop local production operations, whether as wholly-owned subsidiaries or as joint ventures, in the United States, Europe, Southeast Asia, China and, recently, Russia and other countries with emerging markets. These operations contribute to the strengthening of local

● GEOGRAPHICAL DISTRIBUTION OF JAPANESE AUTOMAKERS' OVERSEAS PRODUCTION BASES

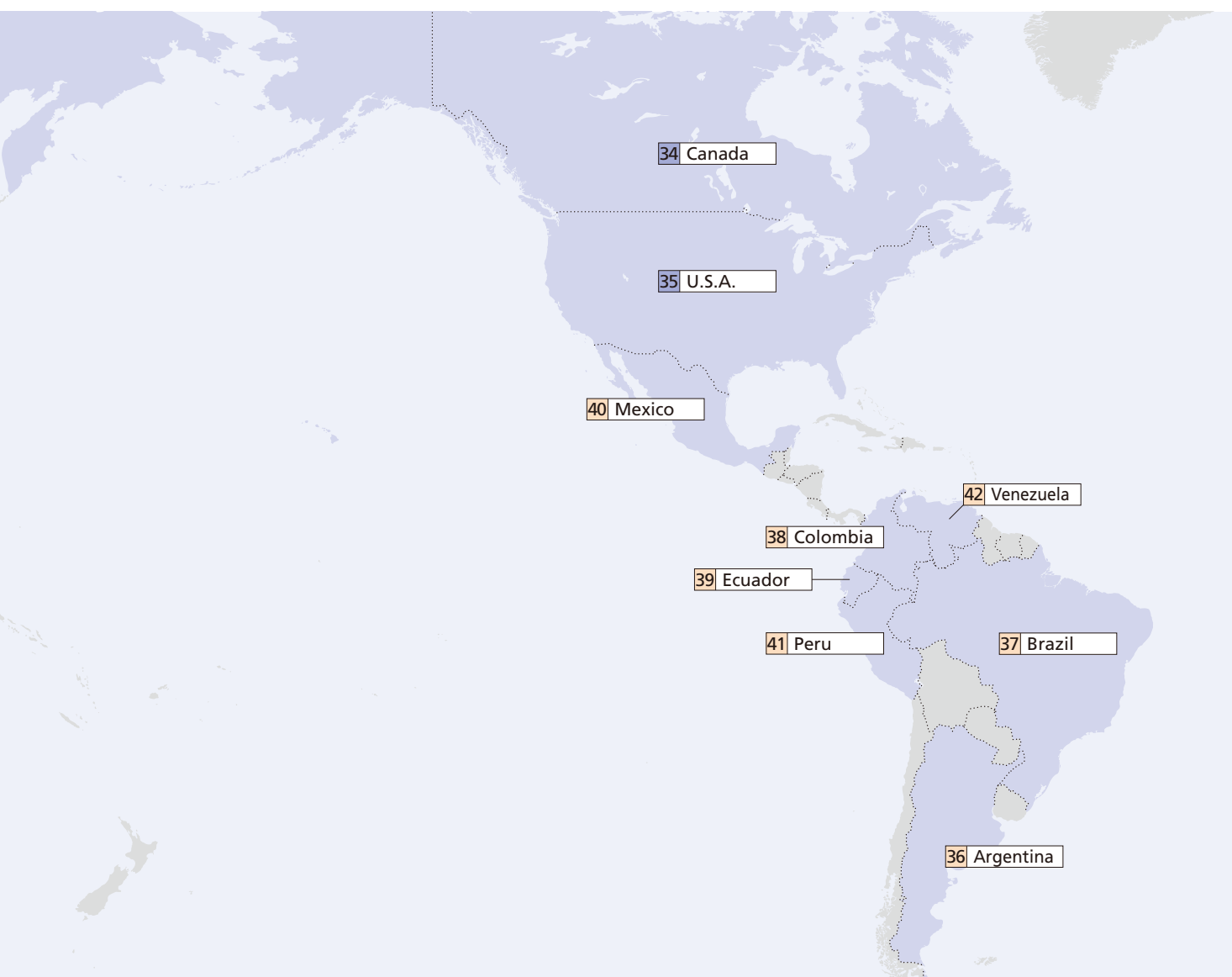


● JAPANESE AUTOMAKERS' OVERSEAS PRODUCTION BASES: Number of Plants by Country &

Country/ Territory	Country No. (see map)	Motor Vehicles (incl. parts)	Motor-cycles (incl. parts)	Motor Vehicles & Motorcycles (incl. parts)	Parts Only
Europe					
Czech Republic	1	1	-	-	-
France	2	1	1	-	-
Hungary	3	1	-	-	-
Italy	4	-	1	-	1
Poland	5	-	-	-	1
Portugal	6	2	-	-	-
Russia	7	6	-	-	-
Spain	8	1	-	-	1
Turkey	9	4	-	-	-
UK	10	3	-	-	1
Europe Total		19	2	-	4

Country/ Territory	Country No. (see map)	Motor Vehicles (incl. parts)	Motor-cycles (incl. parts)	Motor Vehicles & Motorcycles (incl. parts)	Parts Only
Africa					
Algeria	11	2	-	-	-
Egypt	12	5	-	-	-
Kenya	13	3	1	-	-
Mauritius	14	1	-	-	-
Morocco	15	1	-	-	-
Nigeria	16	2	2	-	-
South Africa	17	5	-	-	-
Africa Total		19	3	-	-
Middle East					
Iran	18	1	-	-	-
Saudi Arabia	19	1	-	-	-
Middle East Total		2	-	-	-
Oceania					
Australia	20	-	-	-	1
Oceania Total		-	-	-	1

economies through employment creation, local parts purchasing and, in many cases, export revenue for the host countries. Locally-produced automobile parts such as engines and transmissions, as well as finished vehicles of some models, are exported to Japan and other destinations.



Items Produced

Country/ Territory	Country No. (see map)	Motor Vehicles (incl. parts)	Motor- cycles (incl. parts)	Motor Vehicles & Motorcycles (incl. parts)	Parts Only
Asia					
Bangladesh	21	2	2	-	-
Cambodia	22	-	2	-	-
China	23	23	8	-	19
India	24	12	7	-	2
Indonesia	25	15	7	1	15
Laos	26	-	1	-	-
Malaysia	27	12	2	-	4
Myanmar	28	2	-	-	-
Pakistan	29	5	3	1	-
Philippines	30	7	4	-	4
Taiwan	31	8	2	-	1
Thailand	32	15	4	-	9
Vietnam	33	8	3	2	2
Asia Total		109	45	4	56

Country/ Territory	Country No. (see map)	Motor Vehicles (incl. parts)	Motor- cycles (incl. parts)	Motor Vehicles & Motorcycles (incl. parts)	Parts Only
North America					
Canada	34	5	-	-	2
U.S.A.	35	14	1	-	12
North America Total		19	1	-	14
Latin America					
Argentina	36	1	2	1	-
Brazil	37	7	4	-	4
Colombia	38	1	2	-	-
Ecuador	39	2	-	-	-
Mexico	40	7	1	1	-
Peru	41	-	1	-	-
Venezuela	42	1	-	-	-
Latin America Total		19	10	2	4
World Total		187	61	6	79

Source: Japan Automobile Manufacturers Association

Japanese Automakers' Overseas Production Rises for Eighth Consecutive Year

The global operations of Japanese automobile manufacturers continue to grow, focusing on on-site manufacturing to meet local needs. Whether as independent operations, joint ventures or technical tie-ups, local manufacturing activities are conducted in numerous countries around the world (see pages 54-55). In 2017 Japanese automakers' overseas production totalled 19.7 million units, with Asia and Europe seeing the most significant increases.

OVERSEAS PRODUCTION BY JAPANESE AUTOMOBILE MANUFACTURERS

In vehicle units

Year	Asia	Middle East	Europe		North America		Latin America	Africa	Oceania	Total
			EU	U.S.A.						
1985	208,589	—	44,658	43,175	296,569	296,569	90,252	99,500	151,574	891,142
1986	282,912	—	75,163	73,903	426,087	425,644	87,115	119,000	133,109	1,123,386
1987	355,758	—	102,943	100,794	608,446	592,761	104,925	134,000	127,003	1,433,075
1988	456,489	—	132,129	130,326	723,396	672,766	125,531	145,000	152,334	1,734,879
1989	597,402	—	205,005	203,215	1,040,868	932,242	144,811	184,500	166,541	2,339,127
1990	952,390	—	226,613	223,164	1,570,114	1,298,878	160,654	186,000	169,169	3,264,940
1991	1,035,715	—	285,994	282,278	1,684,964	1,378,907	169,001	172,000	134,051	3,481,725
1992	1,120,430	—	358,601	351,296	1,853,097	1,547,361	195,161	167,500	109,276	3,804,065
1993	1,315,346	—	496,574	472,744	2,030,478	1,691,239	211,802	179,000	106,754	4,339,954
1994	1,553,585	—	502,332	477,728	2,346,619	1,982,209	197,325	168,000	128,213	4,896,074
1995	1,882,850	—	641,573	575,852	2,595,436	2,215,657	110,660	226,000	102,961	5,559,480
1996	1,950,621	—	738,378	650,990	2,641,451	2,275,525	140,031	195,674	118,097	5,784,252
1997	2,003,286	—	814,689	714,699	2,664,588	2,290,685	190,596	182,218	136,107	5,991,484
1998	1,215,202	5,688	920,985	814,847	2,674,299	2,270,516	260,131	144,181	150,685	5,371,171
1999	1,547,671	3,493	929,303	835,582	2,797,175	2,311,163	246,710	130,216	125,575	5,780,143
2000	1,673,740	4,258	953,170	837,679	2,991,924	2,480,691	387,732	146,435	130,933	6,288,192
2001	1,872,521	5,660	1,032,004	939,034	3,061,612	2,451,496	407,887	162,825	137,084	6,679,593
2002	2,380,621	6,000	1,153,059	1,015,748	3,375,453	2,720,449	445,862	155,973	135,498	7,652,466
2003	3,007,348	5,820	1,338,476	1,245,469	3,487,012	2,821,723	457,467	162,969	148,471	8,607,563
2004	3,638,978	10,800	1,454,903	1,296,516	3,840,744	3,143,603	534,863	191,537	125,726	9,797,551
2005	3,964,209	10,500	1,545,355	1,369,556	4,080,713	3,383,277	645,074	225,725	134,581	10,606,157
2006	4,129,856	11,400	1,702,836	1,509,402	4,001,639	3,281,073	745,827	259,050	121,635	10,972,243
2007	4,523,751	3,342	1,976,407	1,789,875	4,049,068	3,324,326	895,099	252,332	159,710	11,859,709
2008	4,877,074	0	1,876,109	1,693,151	3,576,246	2,893,466	920,738	257,646	143,741	11,651,554
2009	5,145,418	0	1,228,294	1,136,145	2,687,527	2,108,161	790,794	168,651	96,836	10,117,520
2010	7,127,042	0	1,356,126	1,250,226	3,390,095	2,653,231	982,342	206,476	119,473	13,181,554
2011	7,547,259	0	1,410,628	1,302,277	3,068,979	2,422,152	1,029,511	233,709	93,675	13,383,761
2012	8,500,993	0	1,484,110	1,383,583	4,253,869	3,324,703	1,234,584	248,711	101,381	15,823,648
2013	9,056,388	0	1,537,025	1,379,733	4,540,685	3,627,226	1,284,187	232,191	106,278	16,756,754
2014	9,112,629	596	1,654,208	1,382,052	4,785,769	3,813,351	1,591,099	241,841	90,125	17,476,267
2015	9,472,178	437	1,668,878	1,401,521	4,823,222	3,847,517	1,820,525	218,020	91,616	18,094,876
2016	10,091,593	89	1,757,776	1,487,994	4,989,360	3,976,482	1,859,685	190,724	90,240	18,979,467
2017	10,870,421	0	1,940,778	1,511,800	4,767,063	3,765,364	1,903,466	198,629	60,942	19,741,299

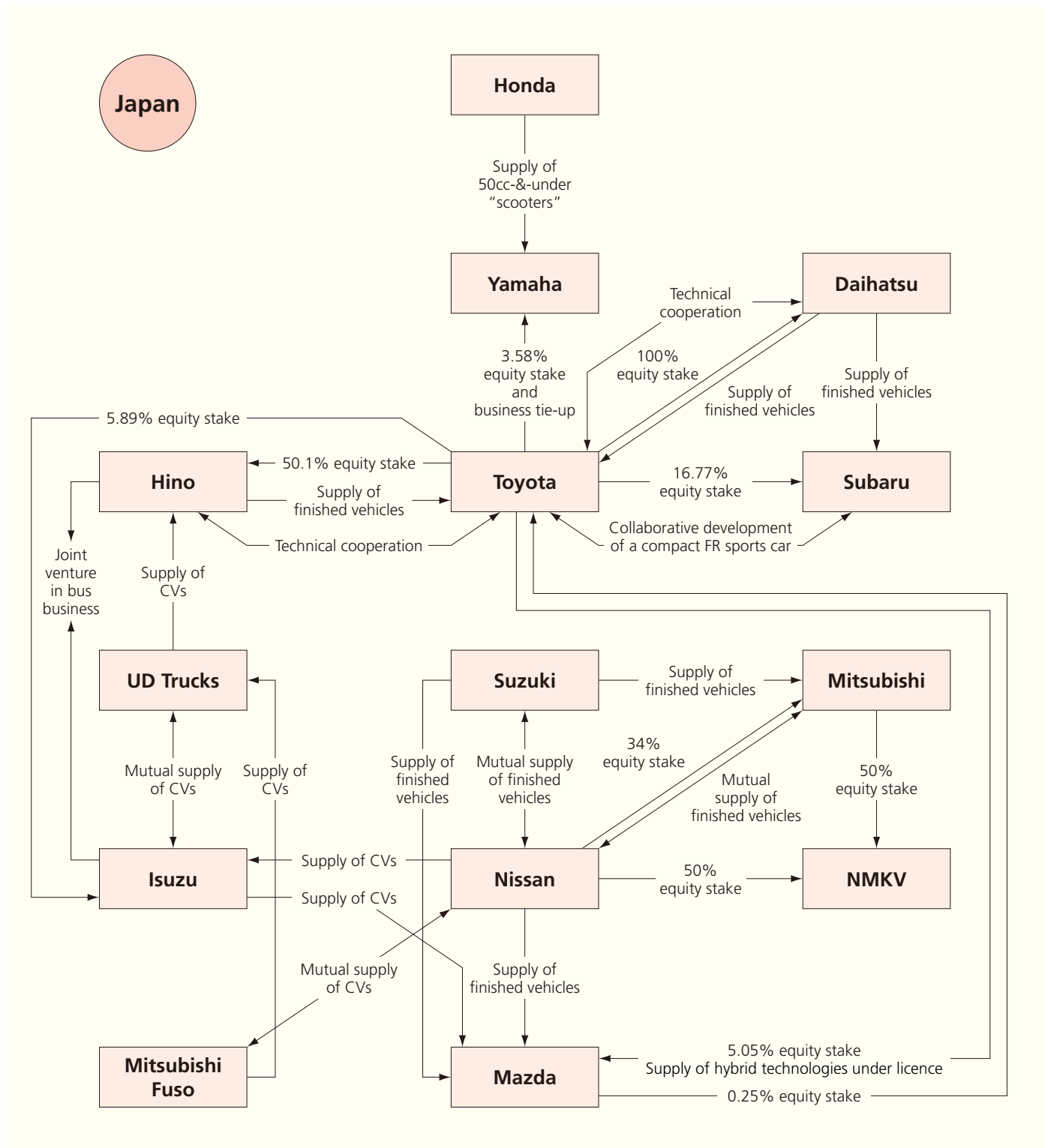
Notes: 1. Data in principle is for Japanese-brand vehicles only. 2. Until 1997, data was based on statistics supplied by the national automobile trade associations of respective countries. 3. Mexico is included in Latin America and Turkey in Europe. 4. Data excludes vehicles produced with technical assistance only provided by Japanese automakers. 5. The figures reflect the use of a new method, adopted as of January 2007, for computing overseas unit production. 6. Figures for 2017 do not include November data from one JAMA member manufacturer.

Source: Japan Automobile Manufacturers Association

Japanese Automakers Forge Extensive International Alliances

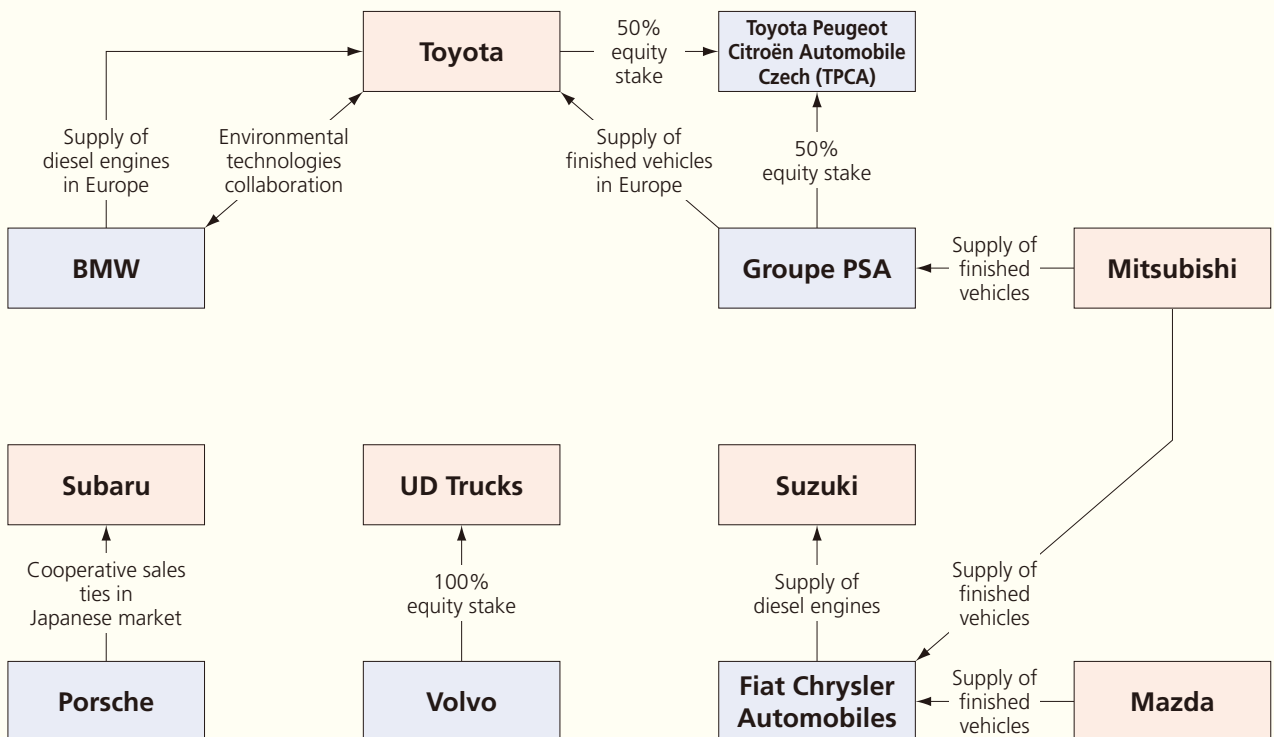
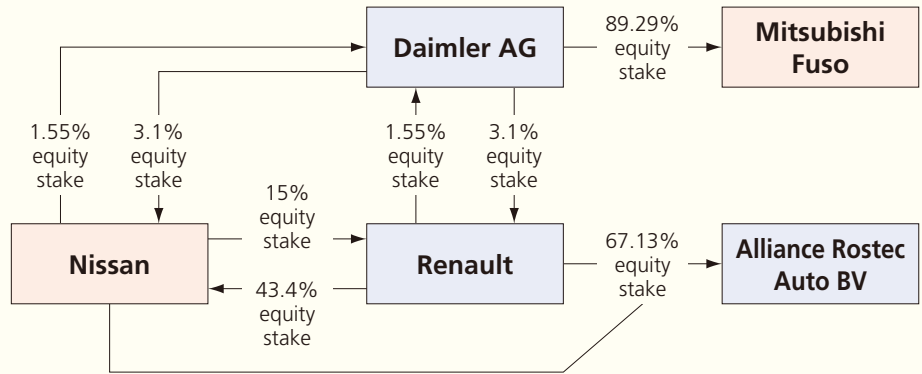
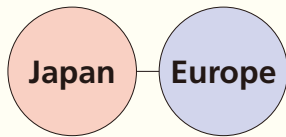
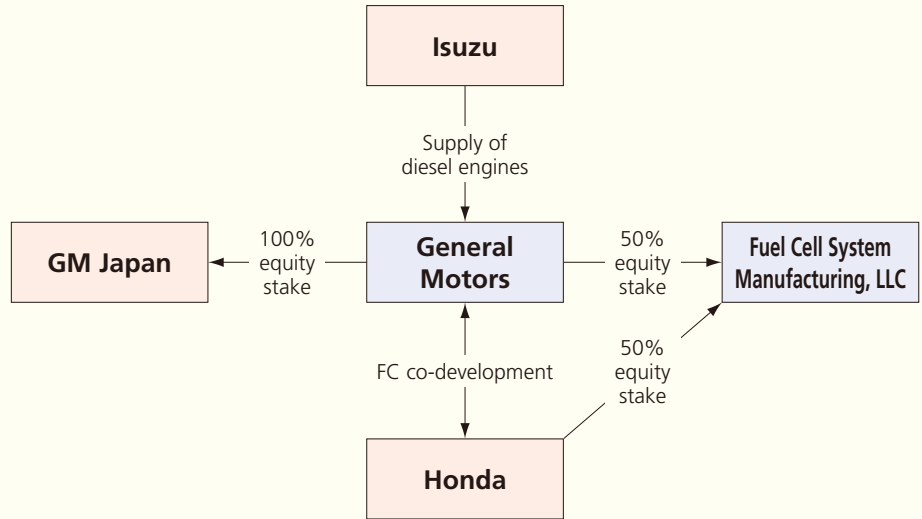
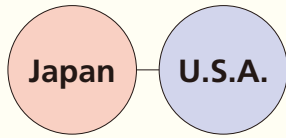
With economic globalization, Japanese automobile manufacturers have rapidly adapted to the needs of individual markets, not only by shifting production to those markets but also by forging extensive alliances with overseas manufacturers. Various forms of partnership currently exist between Japanese, U.S. and European automakers—including capital and technical tie-ups, joint R&D and production operations, and cooperative sales ties—and such arrangements are expanding yearly. With the rapid growth of motorization in China and Southeast Asia, Japanese automakers have been actively building relationships with local manufacturers there on the basis of capital tie-ups and the supply of production as well as environment- and safety-related technologies.

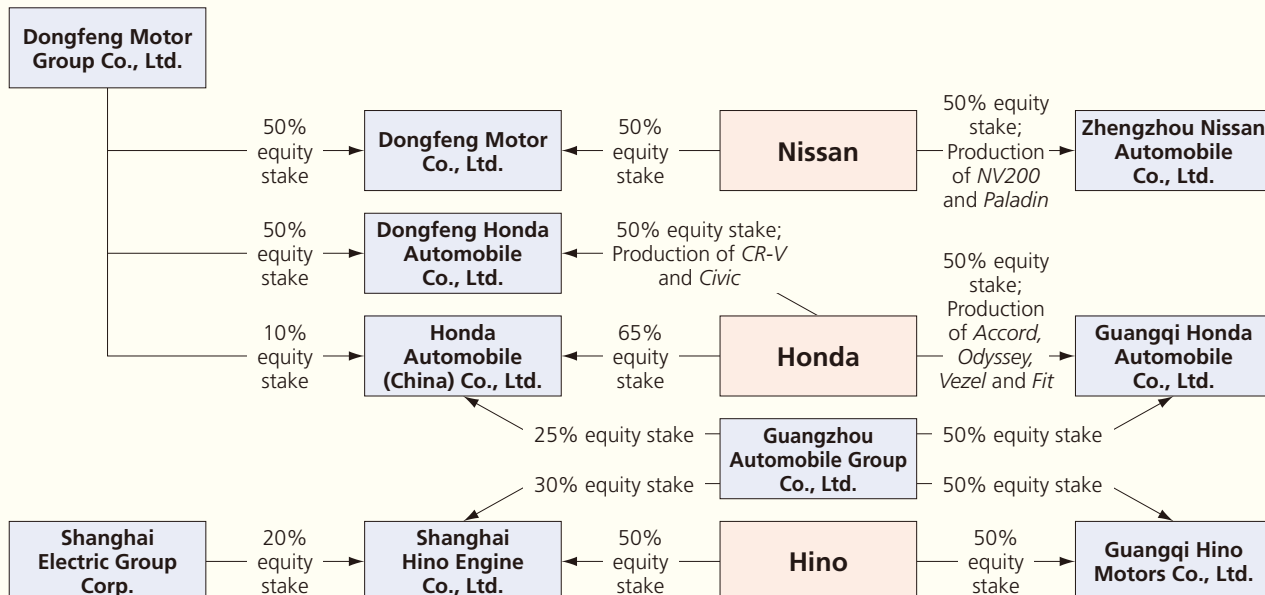
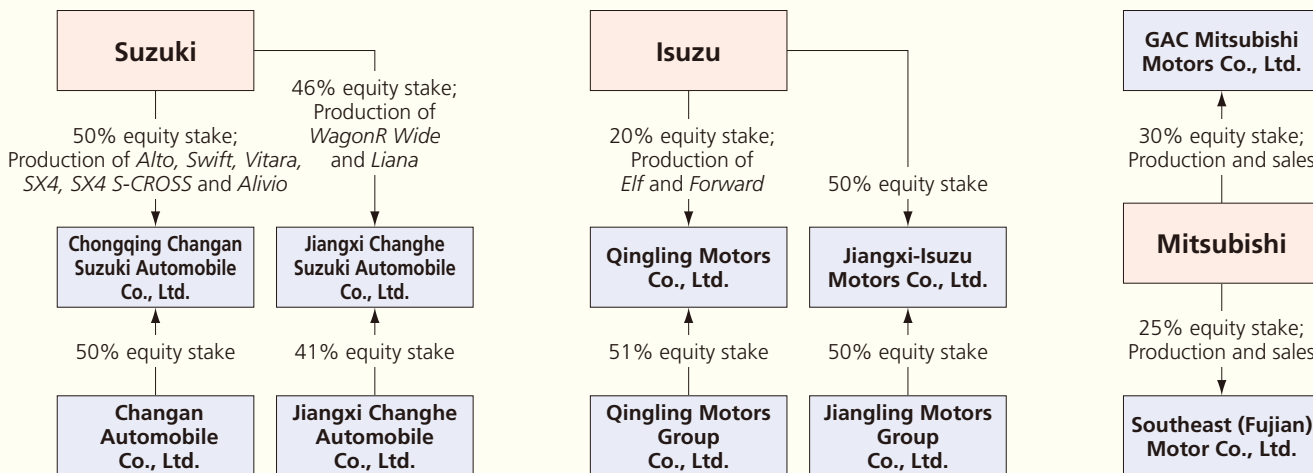
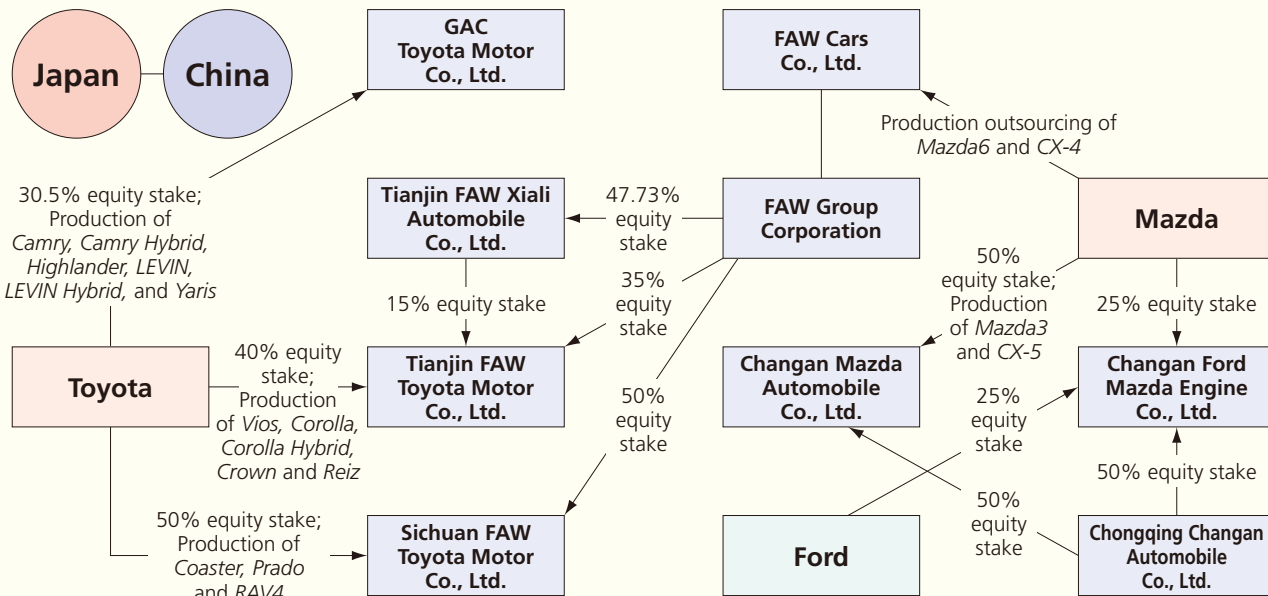
At March 31, 2018



Note: In principle, the tie-ups shown above cover only technical cooperation related to motor vehicle production and exclude sales tie-ups.

Source: Japan Automobile Manufacturers Association



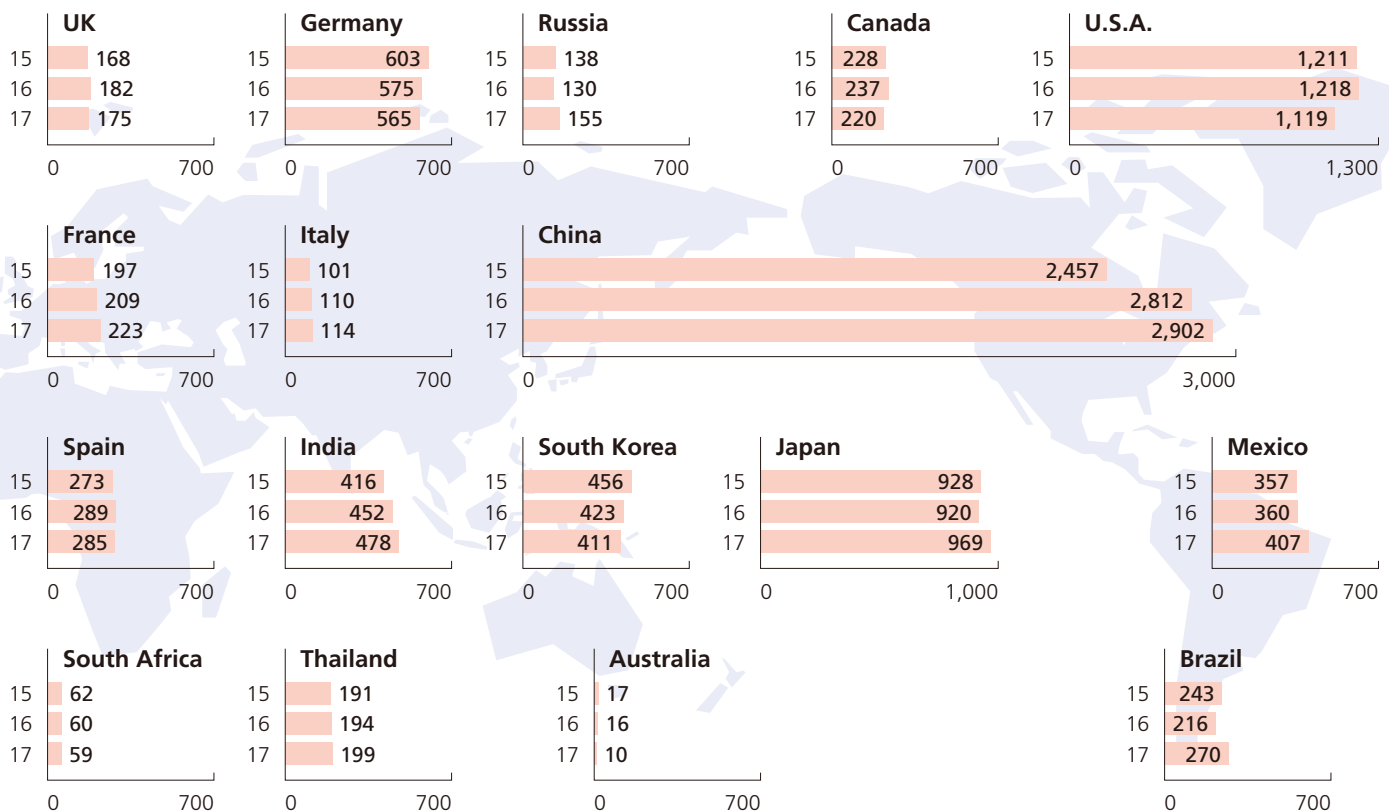


Motor Vehicle Production Worldwide Increases for Eighth Straight Year

In 2017 worldwide motor vehicle production (excluding motorcycles) grew 2.4% from the previous year to a total of 97.30 million units. By region, production increased in Latin America (up 16.1% to 7.28 million units), Asia-Oceania (up 3.3% to 53.54 million units), Africa (up 3.1% to 931,000 units), and Europe (up 3.1% to 22.16 million units), but decreased in North America (down 8.0% to 13.39 million units).

MOTOR VEHICLE PRODUCTION EXCLUDING MOTORCYCLES (MAJOR PRODUCING COUNTRIES)

x 10,000 units



GLOBAL MOTORCYCLE PRODUCTION (BY COUNTRY/TERRITORY)

In vehicle units

Country/Territory	2014			2015			2016		
	Mopeds	Motorcycles	Total	Mopeds	Motorcycles	Total	Mopeds	Motorcycles	Total
Austria	—	—	81,536	—	—	—	—	—	—
Czech Republic	17	1,058	1,075	16	1,711	1,727	9	1,219	1,228
France	—	—	48,853	—	—	—	—	—	—
Germany	—	—	125,497	—	—	—	—	—	—
Italy	—	—	225,820	—	—	—	—	—	—
Spain	—	—	9,700	—	—	—	—	—	—
UK	—	—	18,911	—	—	—	—	—	—
Brazil	—	1,517,662	1,517,662	—	1,262,708	1,262,708	0	887,653	887,653
China	—	18,934,987	21,295,105	—	16,617,298	18,832,191	—	14,734,442	16,820,802
India	—	—	18,489,311	—	—	18,830,227	—	—	19,929,485
Indonesia	—	—	7,926,104	—	—	—	—	—	—
Japan	0	597,058	597,058	0	522,394	522,394	0	560,536	560,536
Malaysia	—	—	439,907	—	—	382,218	—	—	395,938
Pakistan	—	—	916,698	—	—	1,255,770	—	—	1,496,907
Philippines	—	—	749,506	—	—	806,594	—	—	1,040,626
Taiwan	—	—	1,175,259	—	—	1,118,848	—	—	1,217,442
Thailand	—	—	1,816,545	—	—	1,807,325	—	—	1,820,358

Note: "—" means data is not available at the end of March 2018.

Sources: Motorcycle manufacturers' associations of individual countries, etc.

GLOBAL MOTOR VEHICLE PRODUCTION (BY COUNTRY/REGION/TERRITORY)

In vehicle units

Country/Region/ Territory	2015			2016			2017		
	Passenger Cars	Trucks & Buses	Total	Passenger Cars	Trucks & Buses	Total	Passenger Cars	Trucks & Buses	Total
Austria	104,000	17,200	121,200	91,300	18,430	109,730	81,000	18,880	99,880
Belgium	369,172	40,081	409,253	354,003	45,424	399,427	336,000	43,140	379,140
Finland	69,000	53	69,053	48,000	0	48,000	91,598	0	91,598
France	1,555,000	417,000	1,972,000	1,636,000	454,279	2,090,279	1,748,000	479,000	2,227,000
Germany	5,708,138	325,226	6,033,364	5,746,808	0	5,746,808	5,645,581	0	5,645,581
Italy	663,139	351,084	1,014,223	712,971	390,334	1,103,305	742,642	399,568	1,142,210
Netherlands	41,870	2,252	44,122	87,609	2,280	89,889	155,000	2,280	157,280
Portugal	115,468	41,158	156,626	99,200	43,896	143,096	126,426	49,118	175,544
Spain	2,218,980	514,221	2,733,201	2,354,117	531,805	2,885,922	2,291,492	556,843	2,848,335
Sweden	188,987	0	188,987	205,374	0	205,374	226,000	0	226,000
UK	1,587,677	94,479	1,682,156	1,722,698	93,924	1,816,622	1,671,166	78,219	1,749,385
Czech Republic	1,241,166	5,367	1,246,533	1,344,182	5,714	1,349,896	1,413,881	6,112	1,419,993
Hungary	491,720	3,650	495,370	523,000	3,500	526,500	502,000	3,400	505,400
Poland	534,700	125,992	660,692	554,600	127,234	681,834	514,700	175,029	689,729
Romania	387,171	6	387,177	358,861	445	359,306	359,240	10	359,250
Slovakia	1,038,503	0	1,038,503	1,040,000	0	1,040,000	1,001,520	0	1,001,520
Slovenia	133,092	0	133,092	133,702	0	133,702	189,852	0	189,852
Double Counts Portugal/World	0	-7,866	-7,866	0	-8,505	-8,505	0	-11,643	-11,643
Double Counts Eastern Europe/World	-123,360	0	-123,360	-125,200	0	-125,200	-123,010	0	-123,010
European Union (EU27*)	16,324,423	1,929,903	18,254,326	16,887,225	1,708,760	18,595,985	16,973,088	1,795,065	18,768,153
Turkey	791,027	567,769	1,358,796	950,888	535,039	1,485,927	1,142,906	552,825	1,695,731
Serbia	82,400	1,230	83,630	79,360	960	80,320	79,360	552	79,912
Russia	1,216,093	162,153	1,378,246	1,124,310	179,234	1,303,544	1,348,029	203,264	1,551,293
Azerbaijan	0	415	415	0	247	247	0	0	0
Belarus	8,469	6,564	15,033	10,090	7,180	17,270	3,580	9,848	13,428
Kazakhstan	12,453	2,024	14,477	8,397	2,254	10,651	16,789	2,282	19,071
Ukraine	5,654	2,590	8,244	4,340	924	5,264	7,296	2,246	9,542
Uzbekistan	185,400	0	185,400	88,152	0	88,152	140,247	0	140,247
Double Counts CIS/World	-131,550	0	-131,550	-101,090	0	-101,090	-116,270	0	-116,270
CIS	1,296,519	173,746	1,470,265	1,134,199	189,839	1,324,038	1,399,671	217,640	1,617,311
Europe	18,494,369	2,672,648	21,167,017	19,051,672	2,434,598	21,486,270	19,595,025	2,566,082	22,161,107
Canada	888,565	1,394,742	2,283,307	803,230	1,567,426	2,370,656	749,458	1,450,331	2,199,789
U.S.A.	4,162,808	7,943,180	12,105,988	3,916,584	8,263,717	12,180,301	3,033,216	8,156,769	11,189,985
North America	5,051,373	9,337,922	14,389,295	4,719,814	9,831,143	14,550,957	3,782,674	9,607,100	13,389,774
Mexico	1,968,054	1,597,164	3,565,218	1,993,178	1,607,187	3,600,365	1,900,029	2,168,386	4,068,415
Argentina	308,756	217,901	526,657	241,315	231,461	472,776	203,700	268,458	472,158
Brazil	2,017,639	411,782	2,429,421	1,778,464	377,892	2,156,356	2,269,468	430,204	2,699,672
Colombia	76,678	1,070	77,748	77,946	1,090	79,036	73,904	1,090	74,994
Ecuador	0	4,200	4,200	0	2,700	2,700	0	2,700	2,700
Venezuela	9,739	8,561	18,300	849	2,001	2,850	852	922	1,774
Double Counts South America/World	-37,700	-11,000	-48,700	-32,790	-10,580	-43,370	-39,950	0	-39,950
Latin America	4,343,166	2,229,678	6,572,844	4,058,962	2,211,751	6,270,713	4,408,003	2,871,760	7,279,763
North and Latin America	9,394,539	11,567,600	20,962,139	8,778,776	12,042,894	20,821,670	8,190,677	12,478,860	20,669,537
Australia	159,872	13,137	173,009	149,000	12,294	161,294	88,195	10,437	98,632
Bangladesh	540	0	540	580	0	580	580	0	580
China	21,143,351	3,423,899	24,567,250	24,420,744	3,698,050	28,118,794	24,806,687	4,208,747	29,015,434
India	3,408,849	751,736	4,160,585	3,707,348	811,993	4,519,341	3,952,550	830,346	4,782,896
Indonesia	824,445	274,335	1,098,780	968,476	209,321	1,177,797	982,356	234,259	1,216,615
Iran	884,866	97,471	982,337	1,188,072	94,100	1,282,172	1,418,550	96,846	1,515,396
Japan	7,830,722	1,447,599	9,278,321	7,873,886	1,330,816	9,204,702	8,347,836	1,342,838	9,690,674
Malaysia	563,883	50,781	614,664	503,771	41,562	545,333	424,880	35,260	460,140
Pakistan	182,548	47,138	229,686	178,718	35,932	214,650	188,690	41,560	230,250
Philippines	36,395	62,373	98,768	45,853	71,015	116,868	45,853	71,015	116,868
South Korea	4,135,108	420,849	4,555,957	3,859,991	368,518	4,228,509	3,735,399	379,514	4,114,913
Taiwan	298,418	52,667	351,085	251,087	58,435	309,522	230,356	61,207	291,563
Thailand	763,041	1,148,710	1,911,751	805,033	1,139,384	1,944,417	1,170,383	1,170,383	1,988,823
Vietnam	99,052	72,701	171,753	145,571	90,590	236,161	145,571	90,590	236,161
Double Counts Asia/World	-205,130	0	-205,130	-213,830	0	-213,830	-221,410	0	-221,410
Asia-Oceania	40,125,960	7,863,396	47,989,356	43,884,300	7,962,010	51,846,310	44,964,533	8,573,002	53,537,535
Algeria	19,346	0	19,346	42,008	0	42,008	60,606	0	60,606
Egypt	12,000	24,000	36,000	10,930	25,300	36,230	9,970	26,670	36,640
Morocco	260,129	28,208	288,337	313,868	31,238	345,106	341,802	34,484	376,286
South Africa	341,025	274,633	615,658	335,539	263,465	599,004	321,358	268,593	589,951
Tunisia	0	1,670	1,670	0	1,940	1,940	0	1,940	1,940
Double Counts South Africa/World	-28,370	-96,220	-124,590	-28,660	-92,060	-120,720	-27,440	-106,700	-134,140
Africa	604,130	232,291	836,421	673,685	229,883	903,568	706,296	224,987	931,283
Grand Totals	68,618,998	22,335,935	90,954,933	72,388,433	22,669,385	95,057,818	73,456,531	23,842,931	97,299,462

*"EU27" is as per OICA (see "Sources" below) listings. Notes: 1. Includes preliminary figures. 2. Some EU countries do not release truck and bus production data.

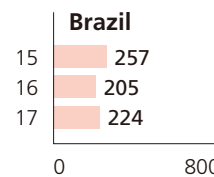
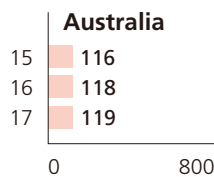
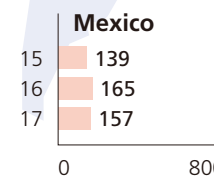
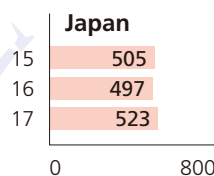
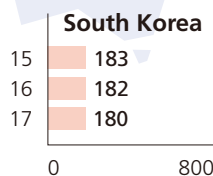
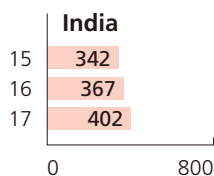
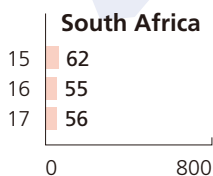
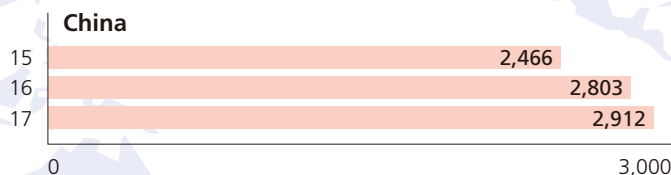
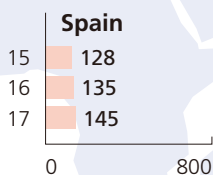
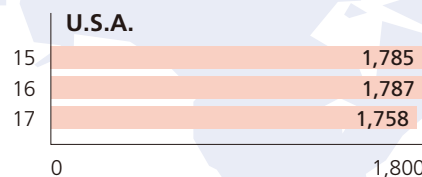
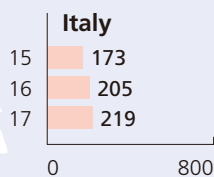
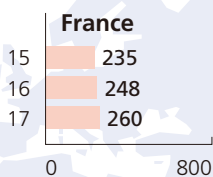
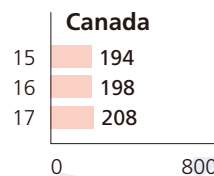
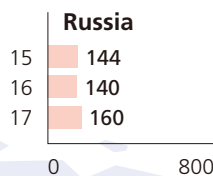
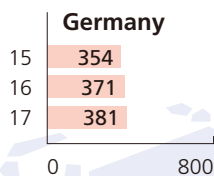
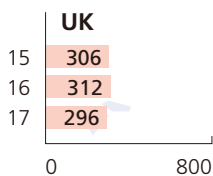
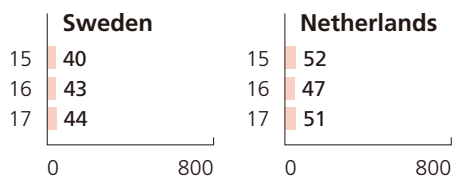
Sources: International Organization of Motor Vehicle Manufacturers (OICA); for Japan, Japan Automobile Manufacturers Association

Global Growth in Motor Vehicle Sales for Eighth Consecutive Year

In 2017 new motor vehicle registrations (excluding motorcycles) increased 3.1% over the previous year to a global total of 96.80 million units. Vehicle sales rose in Russia (up 14.1% to 1.60 million units), India (up 9.5% to 4.02 million units), and Brazil (up 9.2% to 2.24 million units). On the other hand, new registrations dropped from the previous year in the United Kingdom (down 5.4% to 2.96 million units) and Mexico (down 4.7% to 1.57 million units).

NEW REGISTRATIONS OF MOTOR VEHICLES EXCLUDING MOTORCYCLES (SELECTED COUNTRIES)

x 10,000 units



● NEW REGISTRATIONS OF PASSENGER CARS AND COMMERCIAL VEHICLES (BY COUNTRY)

In vehicle units


Country	2015			2016			2017		
	Passenger Cars	Commercial Vehicles	Total	Passenger Cars	Commercial Vehicles	Total	Passenger Cars	Commercial Vehicles	Total
Austria	308,555	41,042	349,597	329,604	44,941	374,545	353,335	50,244	403,580
Belgium	501,066	70,458	571,524	539,519	78,335	617,854	546,533	87,579	634,111
Czech Republic	230,857	29,213	260,070	259,693	31,315	291,008	271,899	30,210	302,109
Denmark	207,717	37,767	245,484	222,924	42,462	265,386	221,586	41,775	263,361
Finland	108,819	14,664	123,483	118,991	17,439	136,430	118,634	19,741	138,375
France	1,917,226	427,866	2,345,092	2,015,177	463,295	2,478,472	2,109,890	495,052	2,604,942
Germany	3,206,042	333,783	3,539,825	3,351,607	357,260	3,708,867	3,442,100	369,146	3,811,246
Hungary	77,171	23,762	100,933	96,552	27,255	123,807	116,249	25,565	141,814
Italy	1,575,737	150,342	1,726,079	1,824,968	225,324	2,050,292	1,969,140	221,263	2,190,403
Netherlands	449,350	71,828	521,178	382,825	86,585	469,410	414,599	93,772	508,371
Norway	150,686	39,420	190,106	154,603	43,388	197,991	158,623	43,272	201,895
Poland	354,975	77,464	432,439	416,123	88,427	504,550	485,199	90,945	576,144
Portugal	178,503	35,151	213,654	207,345	39,998	247,343	222,066	42,838	264,904
Romania	98,325	22,266	120,591	115,004	27,016	142,020	130,415	29,393	159,808
Slovakia	77,968	12,123	90,091	88,165	12,435	100,600	96,100	12,572	108,672
Spain	1,094,077	182,982	1,277,059	1,147,007	200,337	1,347,344	1,235,327	215,763	1,451,089
Sweden	345,108	51,585	396,693	372,318	59,500	431,818	379,392	63,443	442,835
UK	2,633,503	427,903	3,061,406	2,692,786	430,969	3,123,755	2,539,297	415,885	2,955,182
Russia	1,282,740	158,183	1,440,923	1,239,680	164,784	1,404,464	1,393,400	208,870	1,602,270
Switzerland	323,783	38,867	362,650	317,318	38,564	355,882	314,145	41,765	355,910
Turkey	725,596	285,598	1,011,194	756,938	250,919	1,007,857	722,876	257,518	980,394
Canada	712,322	1,227,195	1,939,517	661,088	1,322,657	1,983,745	639,272	1,437,728	2,077,000
U.S.A.	7,516,826	10,328,798	17,845,624	6,872,729	10,993,044	17,865,773	6,096,111	11,487,731	17,583,842
Mexico	892,194	497,280	1,389,474	1,065,912	581,811	1,647,723	1,016,880	553,884	1,570,764
Brazil	2,123,009	445,967	2,568,976	1,676,722	373,599	2,050,321	1,844,394	394,521	2,238,915
Argentina	480,952	163,069	644,021	525,757	183,725	709,482	662,980	237,423	900,403
China	21,210,339	3,451,263	24,661,602	24,376,902	3,651,273	28,028,175	24,961,948	4,160,583	29,122,531
India	2,772,270	652,566	3,424,836	2,966,637	702,640	3,669,277	3,227,701	789,838	4,017,539
Japan	4,215,889	830,621	5,046,510	4,146,458	823,800	4,970,258	4,386,377	847,788	5,234,165
South Korea	1,533,670	300,116	1,833,786	1,533,813	289,228	1,823,041	1,495,468	303,328	1,798,796
Malaysia	591,275	75,402	666,677	514,545	65,579	580,124	519,690	71,406	591,096
Indonesia	755,566	275,856	1,031,422	834,920	213,215	1,048,135	824,901	235,993	1,060,894
Thailand	356,063	443,569	799,632	328,053	440,735	768,788	401,537	471,969	873,506
Australia	924,154	231,254	1,155,408	927,274	250,859	1,178,133	915,219	273,458	1,188,677
Egypt	258,400	73,700	332,100	214,800	49,300	264,100	133,391	47,610	181,001
South Africa	412,670	205,079	617,749	361,289	186,117	547,406	369,599	186,117	555,716
Other	5,723,730	1,646,187	7,369,917	5,850,835	1,540,621	7,391,456	6,108,470	1,598,937	7,707,407
Grand Totals	66,327,133	23,380,189	89,707,322	69,506,881	24,398,751	93,905,632	70,844,743	25,954,924	96,799,667














Sources: International Organization of Motor Vehicle Manufacturers (OICA); for Japan, Japan Automobile Dealers Association; Japan Mini Vehicles Association; Japan Automobile Manufacturers Association

More than 1.3 Billion Motor Vehicles in Use Worldwide

There were over 1.32 billion motor vehicles (excluding motorcycles) in use worldwide in 2016, equivalent to 178 motor vehicles per 1,000 inhabitants or one vehicle for every 5.6 persons. Motorcycle density in recent years has been particularly high in Indonesia, Malaysia, and Thailand, with one motorcycle in use for every three persons; in Greece, with one in use for every six persons; and in Italy, with one in use for every seven persons. In Japan, one motorcycle is in use for every 11 persons.

MOTOR VEHICLE DENSITY: INTERNATIONAL COMPARISONS (at end of 2016)

In vehicle units  x 1 person

Country	No. of Motor Vehicles per 1,000 Inhabitants		No. of Persons per Motor Vehicle (No. of Persons per Passenger Car)
	Total Motor Vehicles	Passenger Cars	
U.S.A.	381	835	1.2 (2.6) 
Australia	579	738	1.4 (1.7) 
Italy	633	714	1.4 (1.6) 
Canada	617	669	1.5 (1.6) 
Japan	486	616	1.6 (2.1) 
Austria	561	615	1.6 (1.8) 
Germany	568	611	1.6 (1.8) 
Spain	496	608	1.6 (2.0) 
France	501	605	1.7 (2.0) 
Switzerland	539	595	1.7 (1.9) 
UK	528	603	1.7 (1.9) 
Belgium	497	573	1.7 (2.0) 
World Average	178	131	5.6 (7.6) 

Sources: Ministry of Land, Infrastructure, Transport and Tourism; Ward's, etc.; for population data, OECD, UN

MOTOR VEHICLES IN USE WORLDWIDE (at end of 2016)


In vehicle units

Country	Passenger Cars	Commercial Vehicles	Total
Germany	45,804,000	3,482,000	49,286,000
Italy	37,876,138	4,823,816	42,699,954
France	32,390,000	6,728,000	39,118,000
UK	34,378,388	4,862,053	39,240,441
Spain	22,876,247	5,150,449	28,026,696
Netherlands	8,439,318	1,088,858	9,528,176
Belgium	5,669,766	858,444	6,528,210
Austria	4,821,557	467,039	5,288,596
Sweden	4,776,744	631,307	5,408,051
Poland	21,943,000	3,584,000	25,527,000
Switzerland	4,524,029	475,242	4,999,271
Turkey	11,317,998	4,952,111	16,270,109
Russia	44,696,000	7,101,000	51,797,000
U.S.A.	123,552,650	147,013,682	270,566,332
Canada	22,410,030	1,859,838	24,269,868
Mexico	28,182,000	10,926,000	39,108,000
Argentina	11,041,800	3,400,200	14,442,000
Brazil	33,888,100	9,195,900	43,084,000
Japan	61,403,630	16,346,890	77,750,520
China	165,600,000	28,400,000	194,000,000
South Korea	17,338,000	4,465,000	21,803,000
India	34,361,000	11,679,000	46,040,000
Thailand	8,286,000	7,320,000	15,606,000
Indonesia	13,481,000	9,032,000	22,513,000
Australia	14,079,000	3,853,000	17,932,000
South Africa	7,010,757	4,953,477	11,964,234
Other	153,205,491	48,204,900	201,410,391
Grand Totals	973,352,643	350,854,206	1,324,206,849

Sources: Ministry of Land, Infrastructure, Transport and Tourism; Ward's, etc.

MOTORCYCLE DENSITY: INTERNATIONAL COMPARISONS (No. of Persons per Motorcycle)

 x 1 person

2016	Indonesia	3	
2014	Malaysia	3	
2015	Thailand	3	
2014	Greece	6	
2014	Italy	7	
2014	Spain	9	
2014	Switzerland	10	
2014	Austria	11	
2016	Japan	11	
2014	Netherlands	14	
2014	Germany	14	
2016	China	17	

Note: Data for Japan is as at March 31.

Sources: Ministry of Land, Infrastructure, Transport and Tourism; Ministry of Internal Affairs and Communications; Federation of Asian Motorcycle Industries (FAMI); European Association of Motorcycle Manufacturers (ACEM), etc.; for population data, OECD, UN

MOTORCYCLES IN USE WORLDWIDE

In vehicle units

Year	Country/Territory	Total
2014	Italy	8,505,620
2014	Spain	5,033,209
2014	France	3,015,223
2014	UK	1,328,300
2014	Netherlands	1,228,147
2014	Switzerland	852,567
2014	Austria	755,447
2014	Poland	1,311,184
2014	Czech Republic	1,016,978
2014	Germany	5,888,263
2014	Greece	1,802,929
2014	Malaysia	11,734,527
2015	Thailand	20,541,724
2015	Taiwan	13,661,753
2016	Indonesia	103,926,312
2016	China	82,442,203
2016	Japan	11,215,300
2016	Philippines	5,329,770

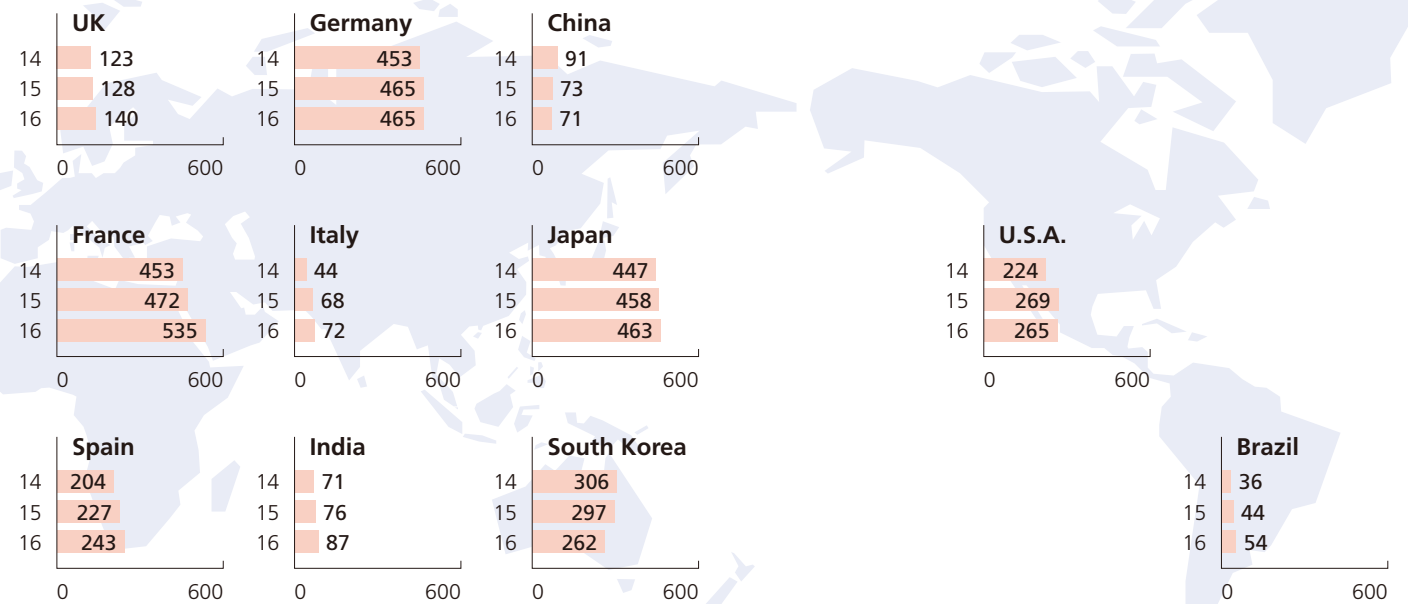
Sources: Ministry of Land, Infrastructure, Transport and Tourism; Ministry of Internal Affairs and Communications; Federation of Asian Motorcycle Industries (FAMI); European Association of Motorcycle Manufacturers (ACEM), etc.

Motor Vehicle Exports Increase in Brazil, India, and France

Motor vehicle exports (excluding motorcycles) in 2016 increased over the previous year in Brazil (up 22.4% to 541,000 units), India (up 14.7% to 867,000 units), and France (up 13.4% to 5.35 million units), but decreased in South Korea (down 11.8% to 2.62 million units), China (down 2.7% to 708,000 units), and the United States (down 1.5% to 2.65 million units).

MOTOR VEHICLE EXPORTS (MAJOR EXPORTING COUNTRIES)

x 10,000 units



MOTOR VEHICLE EXPORTS (MAJOR EXPORTING COUNTRIES)

In vehicle units

Country	2014			2015			2016		
	Passenger Cars	Commercial Vehicles	Total	Passenger Cars	Commercial Vehicles	Total	Passenger Cars	Commercial Vehicles	Total
Japan	3,835,595	630,029	4,465,624	3,970,003	608,075	4,578,078	4,118,432	515,601	4,634,033
U.S.A.	1,784,937	454,592	2,239,529	2,206,701	487,591	2,694,292	2,114,606	539,082	2,653,688
Germany	4,303,127	226,277	4,529,404	4,406,206	244,015	4,650,221	4,411,152	239,901	4,651,053
UK	1,195,196	34,822	1,230,018	1,227,881	47,179	1,275,060	1,349,443	54,842	1,404,285
France	3,961,884	571,759	4,533,643	4,159,198	563,013	4,722,211	4,735,057	617,832	5,352,889
Italy	189,112	249,554	438,666	385,738	297,217	682,955	398,277	318,045	716,322
Spain	1,631,744	408,149	2,039,893	1,893,724	380,008	2,273,732	2,011,248	421,153	2,432,401
Brazil	265,620	93,951	359,571	316,777	125,237	442,014	412,820	128,175	540,995
South Korea	2,919,781	143,423	3,063,204	2,821,832	152,282	2,974,114	2,506,505	115,210	2,621,715
China	533,009	377,352	910,361	427,727	300,505	728,232	477,088	231,173	708,261
India	621,341	86,939	708,280	653,053	103,124	756,177	758,830	108,271	867,101

Sources: Ward's, etc.; for Japan, Japan Automobile Manufacturers Association

MOTORCYCLE EXPORTS (MAJOR EXPORTING COUNTRIES/TERRITORY)

In vehicle units

Country/Territory	2014			2015			2016		
	Mopeds	Motorcycles & Scooters	Total	Mopeds	Motorcycles & Scooters	Total	Mopeds	Motorcycles & Scooters	Total
Japan	0	465,584	465,584	0	417,649	417,649	0	428,619	428,619
China	—	8,281,206	8,281,206	—	7,402,466	7,402,466	—	6,657,949	6,657,949
Taiwan	—	—	499,172	—	—	454,743	—	—	427,392
Indonesia	—	—	41,746	—	—	228,229	—	—	284,065
India	—	—	2,457,466	—	—	2,482,876	—	—	2,339,273

Note: "—" means data is not available at the end of March 2018.

Sources: Automobile/motorcycle manufacturers' associations of individual countries; for Japan, Japan Automobile Manufacturers Association

Classifications According to the Road Vehicles Act and the Road Traffic Act

Japan classifies motor vehicles according to the provisions of two basic laws: the Road Vehicles Act and the Road Traffic Act. Road Vehicles Act classifications are used for registration statistics, vehicle inspection, and related maintenance and repair, while Road Traffic Act classifications determine the different categories of driver's licenses. Vehicle registration number/character combinations are determined by vehicle type and usage in accordance with Road Vehicles Act designations. "Vanity" number plates are obtainable nationwide, and specially designed number plates commemorating the Japan-held 2019 Rugby World Cup and the 2020 Tokyo Olympic and Paralympics are also become available.

CLASSIFICATION UNDER THE ROAD VEHICLES ACT (for registration, inspection, etc.)

Standard Over 2,000cc in engine capacity, excluding diesel engines

Small Over 660cc to 2,000cc in engine capacity, excluding diesel engines

Mini 660cc and under in engine capacity

Note: A vehicle that exceeds any one of the requisites above is classified in the higher category.

CLASSIFICATION UNDER THE ROAD TRAFFIC ACT (for driver's license issuance)

Large Motor Vehicles Gross vehicle weight: ≥11 tons Payload: ≥6.5 tons or Occupancy: ≥30 persons	Middle-Category Motor Vehicles Gross vehicle weight: 7.5≤tons<11 Payload: 4.5≤tons<6.5 or Occupancy: 11≤persons<30	Quasi-Middle-Category Motor Vehicles (1) Gross vehicle weight: 3.5≤tons<7.5 Payload: 2≤tons<4.5 or Occupancy: <11 persons
Ordinary Motor Vehicles Gross vehicle weight: <5 tons Payload: <3 tons or Occupancy: <11 persons	Special-Purpose Motor Vehicles Motor vehicles with caterpillar treads such as bulldozers, steamrollers, graders, snowplows, tractors, etc. are classified into two categories: large and small. Small special-purpose motor vehicles are those of up to 15km/h in maximum speed, up to 4.7m in length, up to 2m in height (2), and up to 1.7m in width.	

(1) As per a revision to the Road Traffic Act, the quasi-middle-category motor vehicle classification went into application in March 2017. (2) Projections on small special-purpose vehicles should not exceed 2.8m.
 Note: The Road Traffic Act stipulates that the driver of any one-rider, three- or four-wheeled vehicle of up to 50cc in engine capacity, with a legal maximum speed of 50km/h and a maximum load of 30kg, is required to hold an "ordinary motor vehicle" driver's license.

CLASSIFICATION OF MOTORCYCLES

Road Vehicles Act						Road Traffic Act	
Category	Engine Capacity	Rated Output	Width	Height	Length	Category	Engine Capacity
Small-sized	Over 250cc	Over 1.0kW	Over 1.3m	Over 2.0m	Over 2.5m	Large	Over 400cc
Mini-sized	126cc to 250cc	Over 1.0kW	1.3m and under	2.0m and under	2.5m and under	Ordinary	51cc to 400cc
Motor-driven cycles Class 2	51cc to 125cc	Over 0.6kW to 1.0kW	1.3m and under	2.0m and under	2.5m and under	Motorized bicycles	50cc and under
Motor-driven cycles Class 1	50cc and under	0.6kW and under	1.3m and under	2.0m and under	2.5m and under		

Note: A motorcycle that exceeds any one of the requisites above is classified in the higher category.

SIGNIFICANCE OF VEHICLE REGISTRATION DATA & NUMBER PLATE TYPES

Large-Sized Number Plates	
Larger-than-standard-size plates are issued to vehicles weighing 8 tons or more, with payload of 5 tons or more, or 30-person or more occupancy.	22cm x 44cm
Mid-Sized Number Plates	
Standard-size plates are issued to standard and small vehicles and mini-vehicles with engine capacity of more than 360cc, whether for private or commercial business use.	16.5cm x 33cm
Small-Sized Number Plates	
Small-size plates are issued to small- and mini-sized motorcycles and mini-vehicles with engine capacity of 360cc or less, excluding those designated with any one of the 40-to-49, 50-to-59 or 80-to-89 number categories.	12.5cm x 23cm

Motor Vehicle Registry Designation:
Kanji indicate geographical area of vehicle registration.

品川 500
 さ 23-45

Designated Number Categories Indicating Vehicle Type	
Ordinary trucks	1, 10-19, 100-199
Ordinary buses	2, 20-29, 200-299
Ordinary passenger cars	3, 30-39, 300-399
Three- or four-wheeled small trucks	4, 40-49, 400-499
Three- or four-wheeled small passenger cars and small buses	6, 60-69, 600-699
Special-purpose vehicles	8, 80-89, 800-899
Large special-purpose vehicles	9, 90-99, 900-999
Large special-purpose vehicles used as construction machinery	0, 00-09, 000-099

Usage Designations	
Ordinary and large motor vehicles	
Private use	さすせそたちつてとなにぬねのはひふほまみむめもやゆらりるろ
Commercial business use	あいうえかきくけこを
Rental vehicle	われ
Foreign military vehicle	EHKMTYよ
Mini-vehicles	
Private use	あいうえかきくけこさすせそたちつてとなにぬねのはひふほまみむめもやゆららるろを
Commercial business use	りれ
Rental vehicle	わ
Foreign military vehicle	AB

Hiragana character indicates vehicle usage category: private, commercial, rental or foreign military vehicle (private or official).

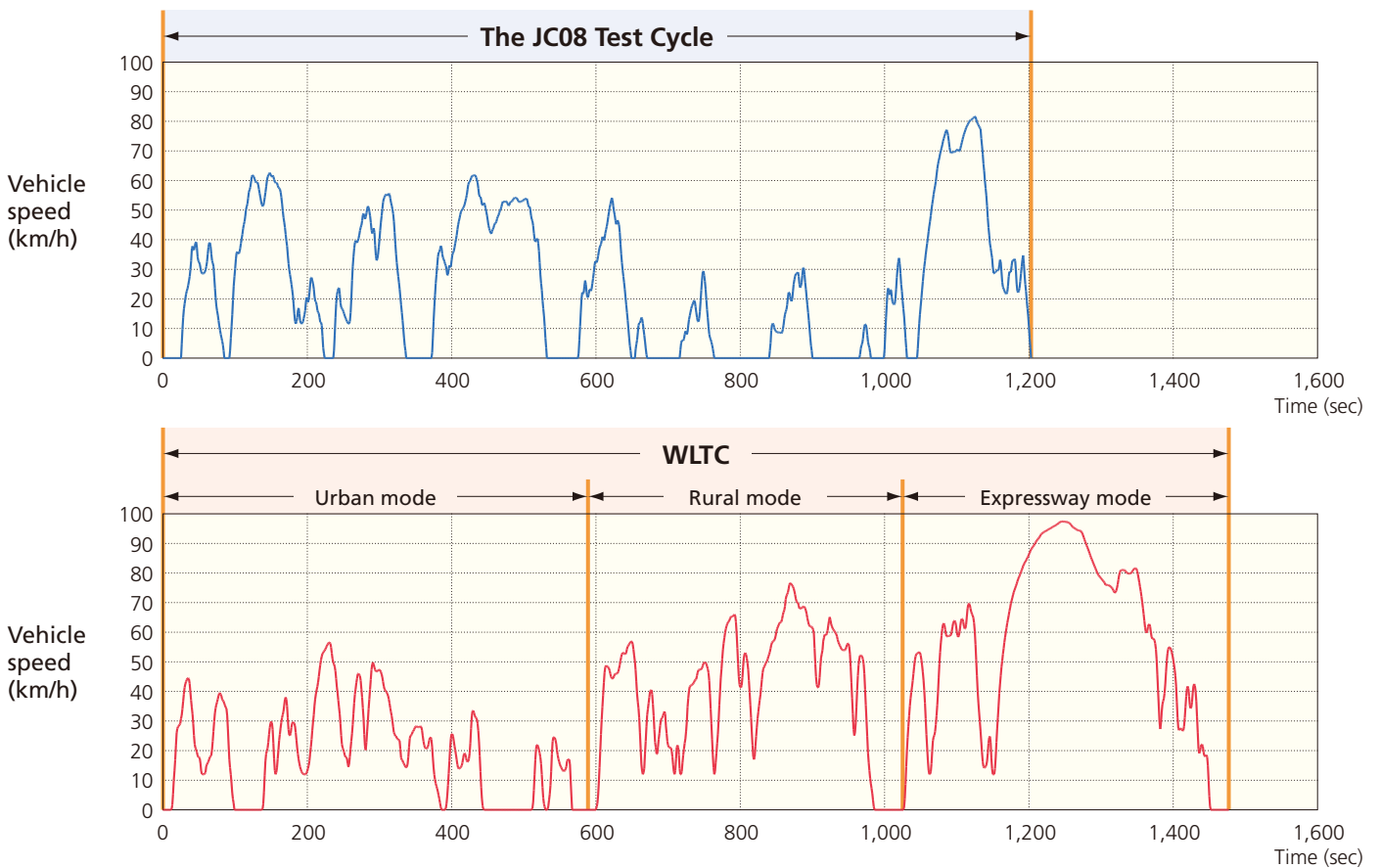
Number Assignment	
From "1" to "99-99"	

Number Plate Colors	
Ordinary and large motor vehicles	
Private use or rental vehicle	Green characters on white background
Commercial business use	White characters on green background
Mini-vehicles	
Private use or rental vehicle	Black characters on yellow background
Commercial business use	Yellow characters on black background

Japan’s Test Cycles for Measuring Fuel Consumption and Exhaust Emissions

Japan not only promotes the international standardization of test cycles for measuring motor vehicle fuel consumption and CO₂ and other emissions but has actively contributed to the development of the Worldwide Harmonized Light Vehicles Test Cycle (also referred to as the Worldwide Harmonized Light-Duty Test Cycle), or WLTC, under the United Nations’ World Forum for Harmonization of Vehicle Regulations. In line with that initiative, Japan is now in the process of replacing its JC08 test cycle for passenger cars and other non-heavy-duty vehicles with WLTC. WLTC incorporates three driving cycles: the “urban, rural and expressway modes,” as they are called in Japanese. Fuel consumption rates measured in the three driving “modes” as well as their certified mean (i.e., average) rate will be required to be indicated wherever necessary from October 2018.

● COMPARISON OF THE JC08 TEST CYCLE AND WLTC FOR LIGHT VEHICLES



● HOW LIGHT-VEHICLE FUEL CONSUMPTION RATES (EXAMPLES) ARE INDICATED IN JAPAN

Measured on the basis of the JC08 test cycle

Fuel consumption rate (1) certified by the Ministry of Land, Infrastructure, Transport and Tourism



21.4 km/L

(1) Fuel consumption rates are obtained on the basis of designated test conditions. In real-world on-road driving, rates will vary as a result of multiple factors (weather and traffic conditions, driving behavior, use of air conditioner, etc.).

Measured on the basis of WLTC

Fuel consumption rate (1) certified by the Ministry of Land, Infrastructure, Transport and Tourism



20.4 km/L

Urban mode (2)	15.2km/ℓ
Rural mode (2)	21.4km/ℓ
Expressway mode (2)	23.2km/ℓ

(1) Fuel consumption rates are obtained on the basis of designated test conditions. In real-world on-road driving, rates will vary as a result of multiple factors (weather and traffic conditions, driving behavior, use of air conditioner, etc.).
 (2) WLTC is an international test cycle incorporating urban, rural and expressway driving cycles or “modes” with specific time durations designated for each mode.
 Urban mode: (Assumptions) Low-speed driving characterized by frequent stops and starts owing to numerous traffic signals and congestion
 Rural mode: (Assumptions) Steady driving characterized by fewer stops and starts owing to fewer traffic signals and less congestion than in urban driving
 Expressway driving mode: (Assumptions) High-speed driving typical of highway driving

Alternative Systems Expedite Certification

Motor vehicle certification in Japan is based primarily on the Type Approval System, which is applied to both domestic and imported automobiles and covers most mass-produced models. The Preferential Handling Procedure for imported motor vehicles is an alternative procedure which was instituted to expedite the certification of foreign-made vehicles that are imported in limited quantities. The Type Notification System and the Common Structure Type Approval System are mainly applied to large commercial vehicles.

THE TYPE APPROVAL SYSTEM

This certification procedure is applied to domestic and imported mass-produced models. The Ministry of Land, Infrastructure, Transport and Tourism (MLIT) inspects a sample vehicle and the quality-control system of the automobile manufacturer concerned, then completes the type approval process within two months in principle. All finished vehicles that have been granted type approval are then inspected by the manufacturer, eliminating the need to present them for new vehicle inspection. For imported vehicles, the MLIT not only dispatches officials overseas to conduct certification inspections but also accepts the test results of designated foreign testing institutes.

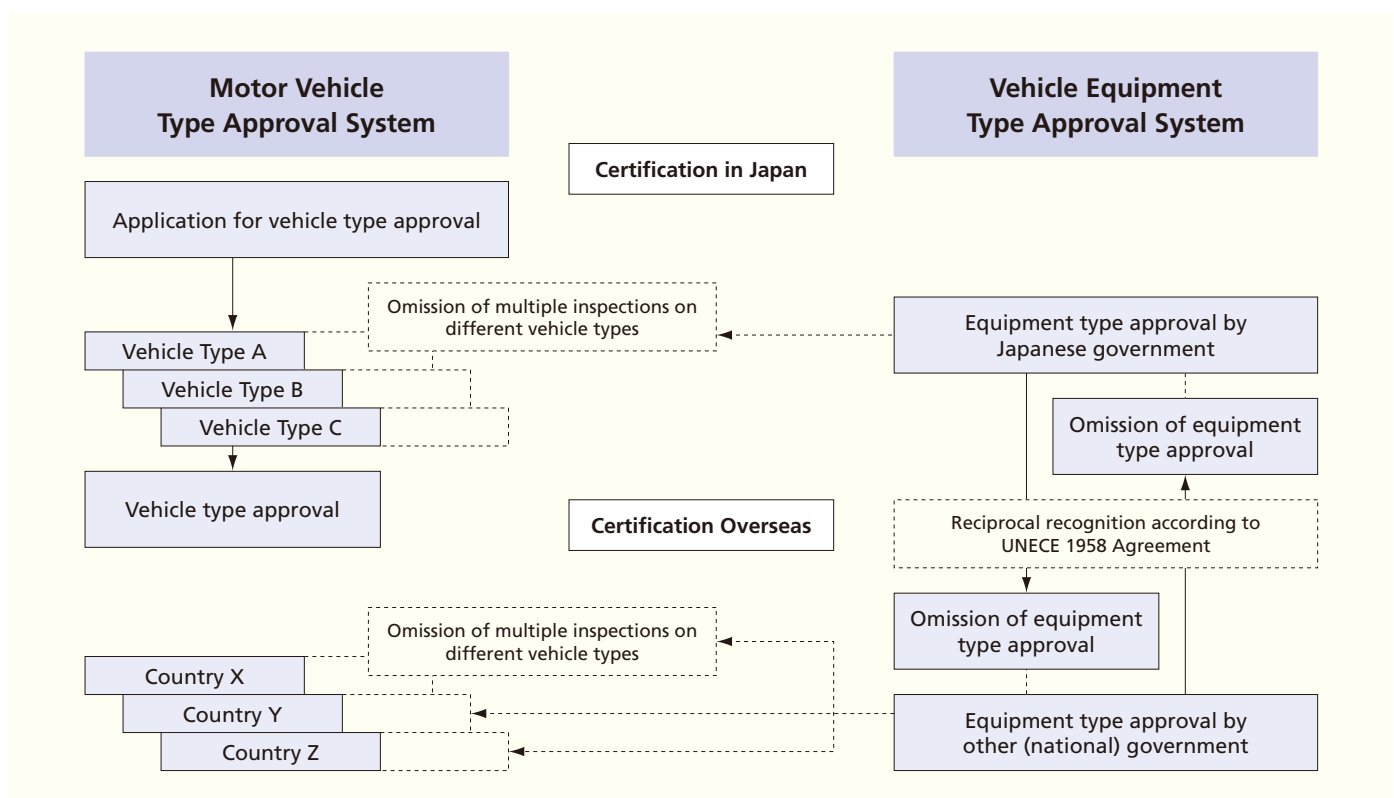
THE PREFERENTIAL HANDLING PROCEDURE FOR IMPORTED VEHICLES

This procedure is applied to models that are imported into Japan in quantities of 5,000 units or less per year. Designed to make the importation of vehicles simpler and faster, it exempts the applicant from undergoing the sample vehicle inspection that is mandatory under the Type Approval System. The MLIT inspects only the application documentation and issues a form indicating completion of the procedure within one month.

RATIONALIZATION OF MOTOR VEHICLE/RECIPROCAL EQUIPMENT TYPE APPROVAL SYSTEMS

Increased globalization in the automobile industry worldwide is underscoring the need for the more widespread adoption of reciprocal recognition systems, under which certification is mutually recognized between importing and exporting countries or regions. Meanwhile, the United Nations' World Forum for Harmonization of Vehicle Regulations (also known as WP.29) is making steady progress in the establishment of global technical regulations (GTRs) focusing on vehicle safety and environmental standards. In 1998 the Japanese government officially acceded to the UNECE 1958 Agreement, under which each signatory government reciprocally recognizes certifications of vehicle structure and equipment issued by all the other signatory countries. It also introduced the Vehicle Equipment Type Approval System, which specifically addresses the expanding common use of equipment in vehicle manufacturing. This system not only allows equipment and parts that have been certified by 1958 Agreement co-signatory countries to be exempted from undergoing certification procedures in Japan, but furthermore does not require them to be inspected again if they are used in other models.

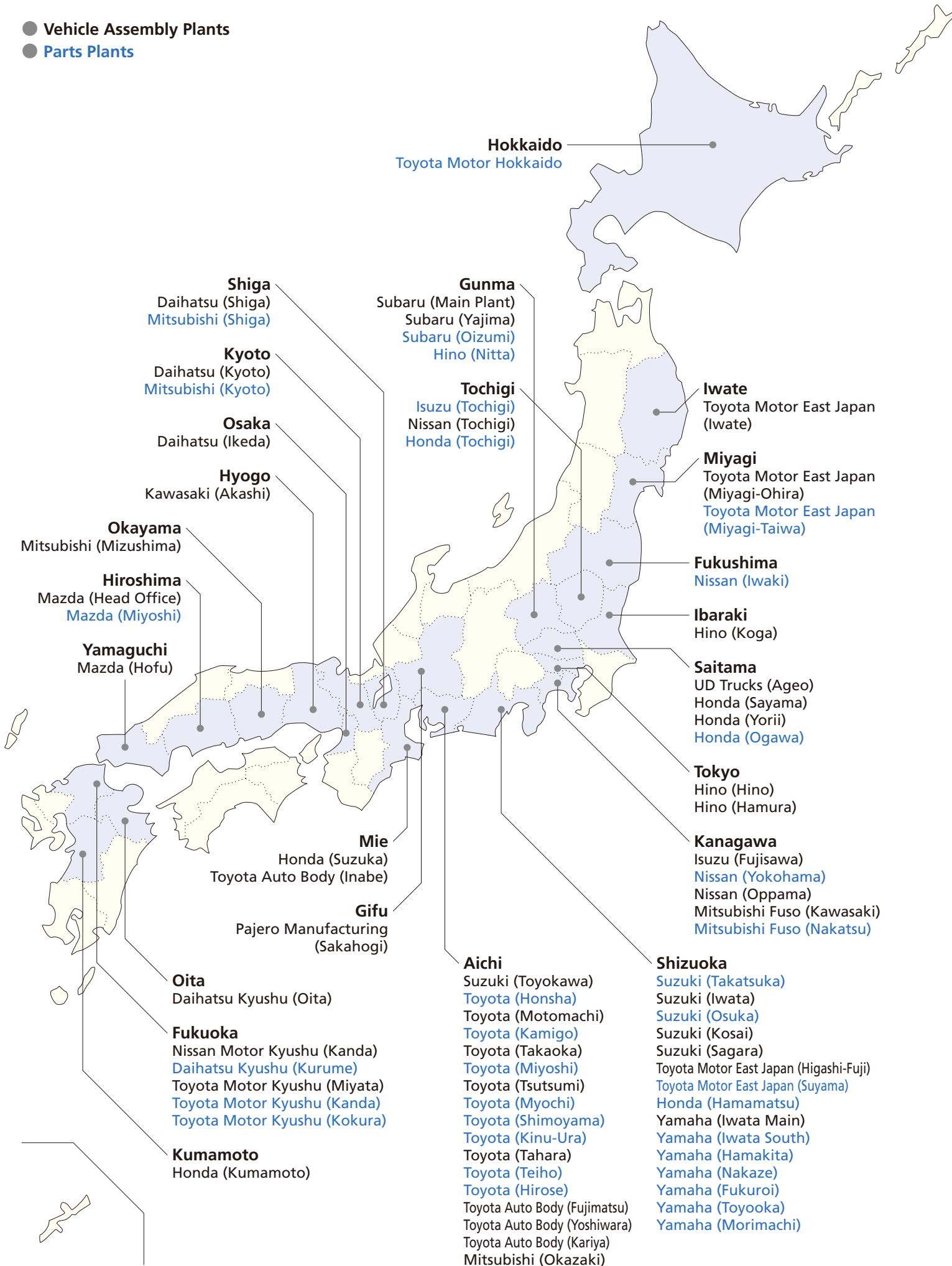
● JAPAN'S RATIONALIZATION OF MOTOR VEHICLE/RECIPROCAL EQUIPMENT TYPE APPROVAL SYSTEMS



Locations of Auto Manufacturing Plants

At April 1, 2018

- Vehicle Assembly Plants
- Parts Plants





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