

✕ THE MOTOR INDUSTRY ✕  
OF JAPAN

2020

JAPAN AUTOMOBILE MANUFACTURERS ASSOCIATION, INC.

Contents

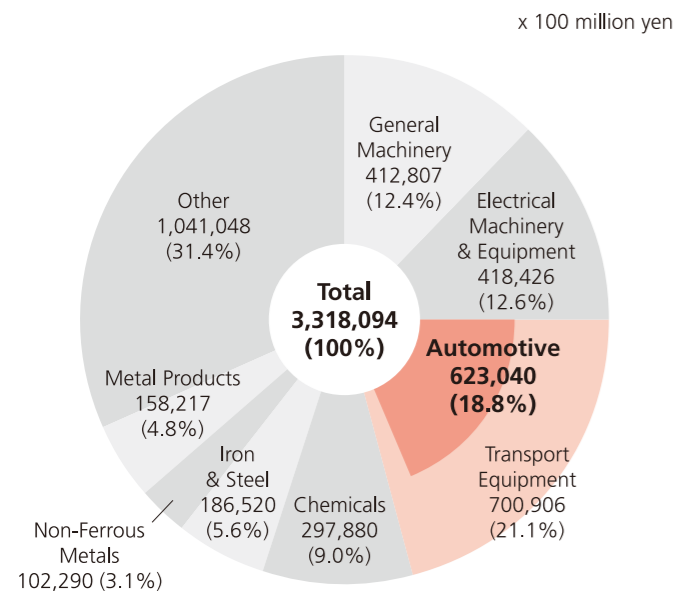
	Page
<b>Automobile Manufacturing: A Core Industry</b>	
Automotive Shipments in Value Terms .....	2
Automotive Trade .....	4
Automobile-Related Industries and Total Employment .....	5
<b>Motor Vehicles</b>	
Production .....	6
New Registrations .....	8
Imported Vehicle Sales .....	10
Used Vehicle Sales .....	11
Motor Vehicles in Use and Motor Vehicle Density .....	12
Exports .....	14
Exports by Destination .....	16
<b>Motorcycles</b>	
Production .....	18
Sales .....	19
Motorcycles in Use .....	20
Exports .....	21
Exports by Destination .....	22
<b>Assisted-Mobility Vehicles</b>	
Assisted-Mobility Vehicles .....	24
<b>Road Safety</b>	
Road Safety .....	25
ASV Technologies .....	26
Vehicle Safety .....	27
ITS and Automated Driving .....	28
A Mid-to-Long-Term Vision for Mobility .....	29

<b>Attention to the Environment</b>	
Climate Change .....	30
Vehicle Fuel Efficiency .....	31
Next-Generation Vehicles and CO2 Reductions at Manufacturers' Facilities .....	32
Hazardous Substances .....	33
Recycling .....	34
Emissions .....	36
Measuring Motor Vehicle Fuel Consumption and Emissions .....	37
<b>Taxes</b>	
Taxes on Automobiles .....	38
Tax Incentive Measures for Eco-Friendly Vehicles .....	40
Auto Tax Reform Measures .....	42
The Burden on Motor Vehicle Users .....	44
<b>The Tokyo Motor Show</b>	
The 46th Tokyo Motor Show 2019 .....	45
<b>Vehicle-Based Systems</b>	
Driver's Licenses and the Driving Population .....	46
Motor Vehicle Classification .....	47
<b>Global Operations</b>	
Overseas Production .....	48
Overseas Production Volumes .....	50
Global Industry Ties .....	51
<b>Motor Vehicles Worldwide</b>	
Global Production (Including Motorcycles) .....	54
New Registrations .....	56
Motor Vehicles & Motorcycles in Use / Motor Vehicle & Motorcycle Density .....	58
Exports (Including Motorcycles) .....	59
Customs Tariffs, EPAs-FTAs .....	60
Locations of Auto Manufacturing Plants .....	61
JAMA Member Manufacturers .....	62
Related Automotive Associations .....	64

# Automotive Shipments Total 62.3 Trillion Yen; Equipment Investments, 1.5 Trillion Yen; R&D Expenditures, 2.9 Trillion Yen

Automotive shipments (both domestic and export shipments, including motorcycles, auto parts, etc.) in value terms reached 62.3 trillion yen in 2018, up 2.6% from the previous year, accounting for 18.8% of the total value of Japan's manufacturing shipments and 40.7% of the value of the machinery industries' combined shipments. Investments in equipment by the automobile industry in 2018 totalled 1.5 trillion yen and its research and development expenditures stood at 2.9 trillion yen; those figures represent, respectively, more than 20% of the value of overall investments of Japan's major manufacturing sectors. With motor vehicle exports in value terms amounting to 15.9 trillion yen in 2018 and auto-related employment in Japan totalling 5.42 million people, the automotive industry is one of the Japanese economy's core industrial sectors.

## SHIPMENTS OF MAJOR MANUFACTURING SECTORS IN VALUE TERMS (2018)



**Breakdown of automotive shipments:**

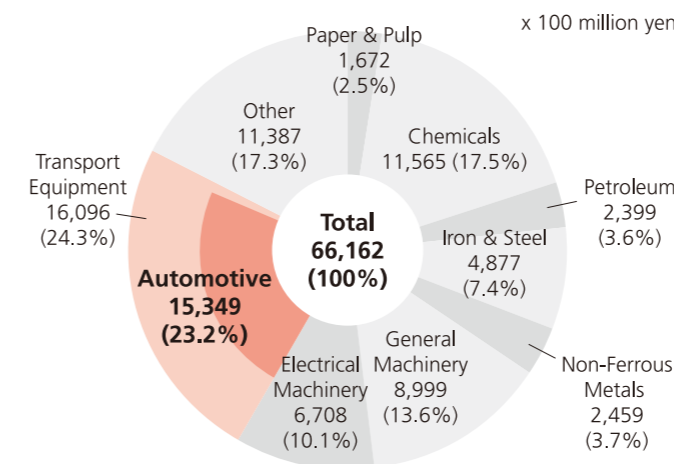
- Automobiles (including motorcycles) ..... 254,578
- Auto bodies and trailers ..... 7,199
- Automotive parts and accessories ..... 361,263

## SHIPMENTS OF MAJOR MANUFACTURING SECTORS IN VALUE TERMS, 1970-2018

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
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
2016	272,496	156,693	88,892	143,986	363,611	376,748	649,912	577,604	1,390,271	968,018	3,020,356	41.5	19.1
2017	287,242	176,867	97,620	151,989	392,279	398,955	682,635	606,999	1,473,869	1,004,080	3,191,667	41.2	19.0
2018	297,880	186,520	102,290	158,217	412,807	418,426	700,906	623,040	1,532,139	1,041,048	3,318,094	40.7	18.8

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. 2018 data includes preliminary figures. Source for statistical data on this page: 2019 Census of Manufactures, Ministry of Economy, Trade and Industry

## INVESTMENTS IN EQUIPMENT OF MAJOR MANUFACTURING SECTORS (FY 2018)



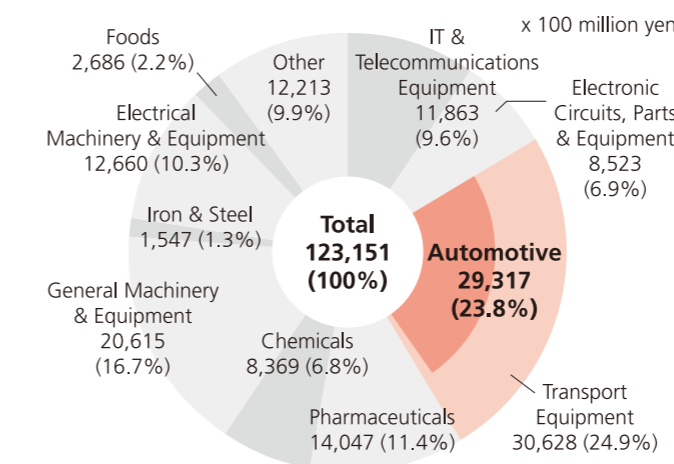
Note: Japan's fiscal year (FY) starts on April 1 and ends on March 31 of the following year.

## INVESTMENTS IN EQUIPMENT OF MAJOR MANUFACTURING SECTORS

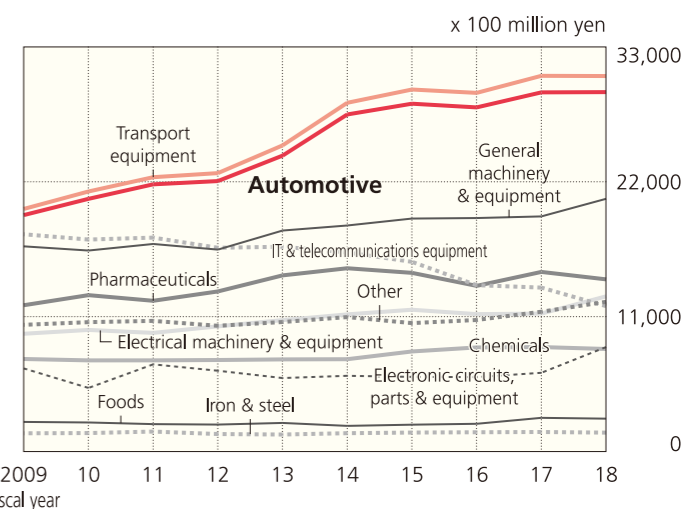
Fiscal year	Paper & Pulp	Chemicals	Petroleum	Iron & Steel	Non-Ferrous Metals	General Machinery	Electrical Machinery	Transport Equipment	Automotive	Other	Total
2009	1,239	7,816	3,074	9,025	1,997	4,591	10,363	11,150	10,080	9,318	58,573
2010	955	7,902	1,837	5,767	1,808	5,307	10,113	7,249	6,855	7,048	47,986
2011	1,415	7,765	1,420	3,242	2,120	5,883	9,585	8,928	8,420	8,508	48,866
2012	1,040	8,407	1,863	5,224	2,081	6,405	8,100	10,412	10,053	9,098	52,630
2013	1,580	6,900	2,241	5,042	1,807	5,448	8,983	10,966	10,611	10,381	53,348
2014	1,372	7,801	2,841	5,799	1,763	6,100	8,920	12,244	11,199	9,980	56,820
2015	1,274	8,100	2,370	5,565	1,807	7,367	8,285	13,928	13,021	9,500	58,196
2016	1,252	9,036	2,156	7,055	1,775	7,702	5,933	14,387	13,306	10,537	59,833
2017	1,283	9,152	2,215	5,133	2,219	7,727	6,149	13,595	12,902	10,782	58,255
2018	1,672	11,565	2,399	4,877	2,459	8,999	6,708	16,096	15,349	11,387	66,162

Source: Survey on Planned Capital Spending, Development Bank of Japan

## R&D EXPENDITURES OF MAJOR MANUFACTURING SECTORS (FY 2018)



## R&D EXPENDITURES OF MAJOR MANUFACTURING SECTORS, 2009-2018



## R&D EXPENDITURES OF MAJOR MANUFACTURING SECTORS

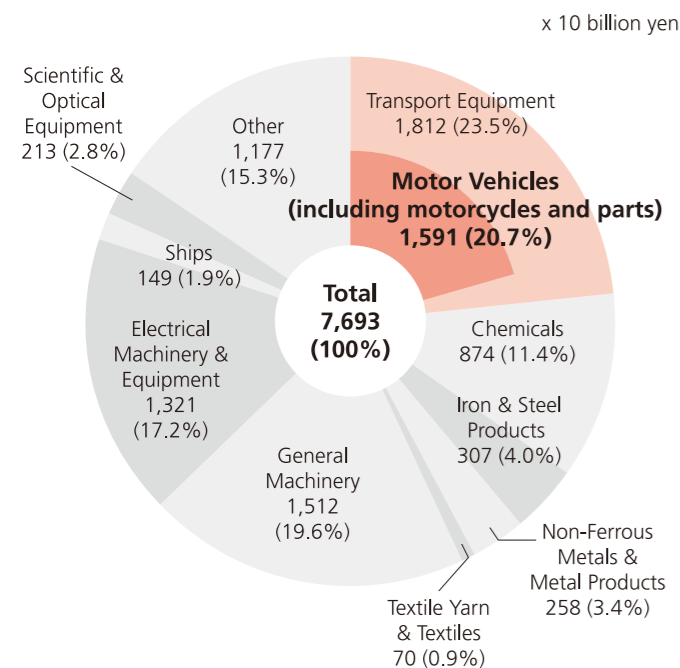
Fiscal year	IT & Telecommunications Equipment	Electronic Circuits, Parts & Equipment	Transport Equipment	Automotive	Pharmaceuticals	Chemicals	General Machinery & Equipment	Iron & Steel	Electrical Machinery & Equipment	Foods	Other	Total
2009	17,724	6,783	19,789	19,288	11,937	7,552	16,739	1,493	9,610	2,420	10,339	104,386
2010	17,293	5,191	21,213	20,613	12,760	7,439	16,397	1,511	9,922	2,375	10,556	104,657
2011	17,451	7,115	22,378	21,796	12,299	7,441	16,933	1,633	9,681	2,241	10,661	107,833
2012	16,623	6,595	22,711	22,062	13,061	7,469	16,472	1,432	10,214	2,204	10,260	107,041
2013	16,708	5,998	24,972	24,137	14,371	7,519	18,027	1,392	10,724	2,337	10,567	112,615
2014	16,238	6,181	28,447	27,495	14,953	7,534	18,440	1,501	11,189	2,097	10,971	117,551
2015	15,476	6,093	29,529	28,372	14,577	8,166	19,005	1,552	11,569	2,195	10,479	118,641
2016	13,572	6,075	29,255	28,071	13,516	8,494	19,047	1,577	11,211	2,267	10,734	115,748
2017	13,374	6,427	30,646	29,296	14,653	8,525	19,180	1,598	11,255	2,753	11,407	119,818
2018	11,863	8,523	30,628	29,317	14,047	8,369	20,615	1,547	12,660	2,686	12,213	123,151

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

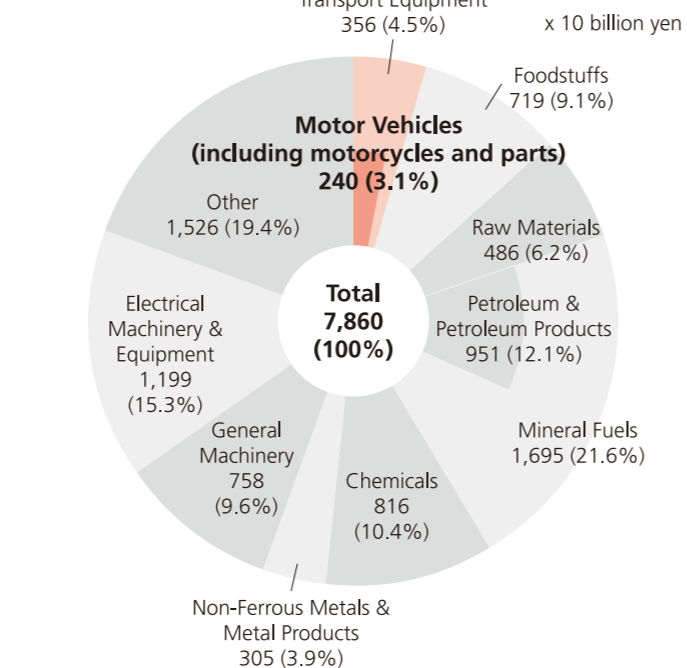
## In Value Terms, Motor Vehicle Exports Total 15.9 Trillion Yen; Imports, 2.4 Trillion Yen

In 2019 Japan's gross exports and imports declined from the previous year, by 5.6% and 5.0%, respectively. In value terms, automotive exports fell 4.7% from 2018 to 15.9 trillion yen, and imports decreased 4.8% year-on-year to 2.4 trillion yen.

### EXPORTS BY PRINCIPAL COMMODITY (FOB) IN 2019



### IMPORTS BY PRINCIPAL COMMODITY (CIF) IN 2019



### AUTOMOTIVE EXPORTS IN VALUE TERMS (FOB)

Year	Motor Vehicles					Exports Total	
		Chg. (%)	Passenger Cars, Trucks, Buses	Auto Parts	Motorcycles & Motorcycle Parts		Chg. (%)
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
2018	166,972	103.7	123,072	39,909	3,990	814,788	104.1
2019	159,052	95.3	119,712	36,017	3,324	769,317	94.4

### AUTOMOTIVE IMPORTS IN VALUE TERMS (CIF)

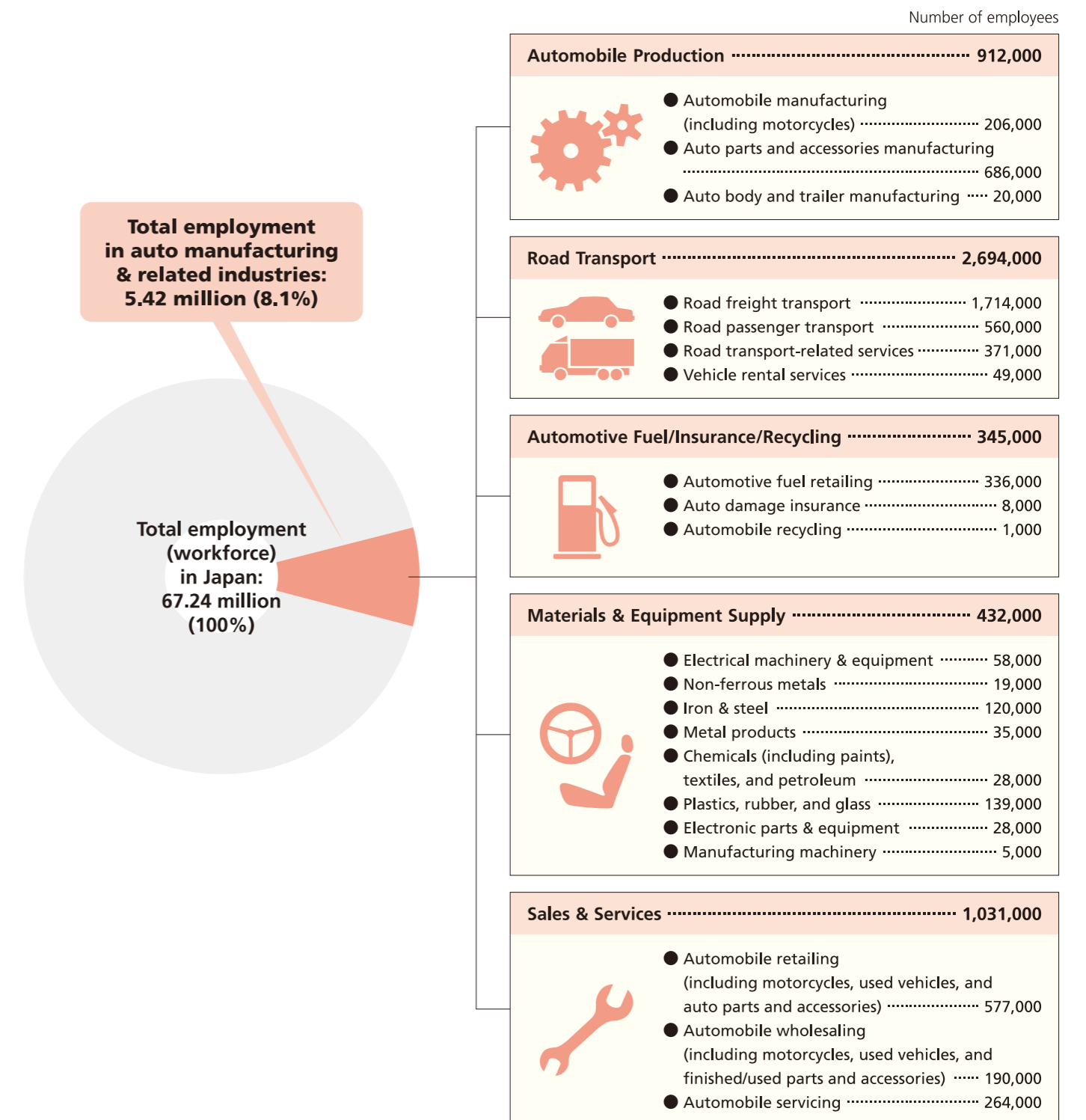
Year	Motor Vehicles					Imports Total	
		Chg. (%)	Passenger Cars, Trucks, Buses	Auto Parts	Motorcycles & Motorcycle Parts		Chg. (%)
2010	11,518	128.2	5,958	4,879	682	607,650	118.0
2011	12,805	111.2	7,352	4,717	736	681,112	112.1
2012	15,506	121.1	9,082	5,549	875	706,886	103.8
2013	18,948	122.2	10,857	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
2018	25,223	107.7	14,284	9,861	1,079	827,033	109.7
2019	24,020	95.2	14,084	8,906	1,030	785,995	95.0

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 (2019), Japan Tariff Association

## Auto-Related Employment Totals 5.42 Million People

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 5.42 million people.

### EMPLOYMENT IN THE AUTOMOBILE MANUFACTURING AND RELATED INDUSTRIES



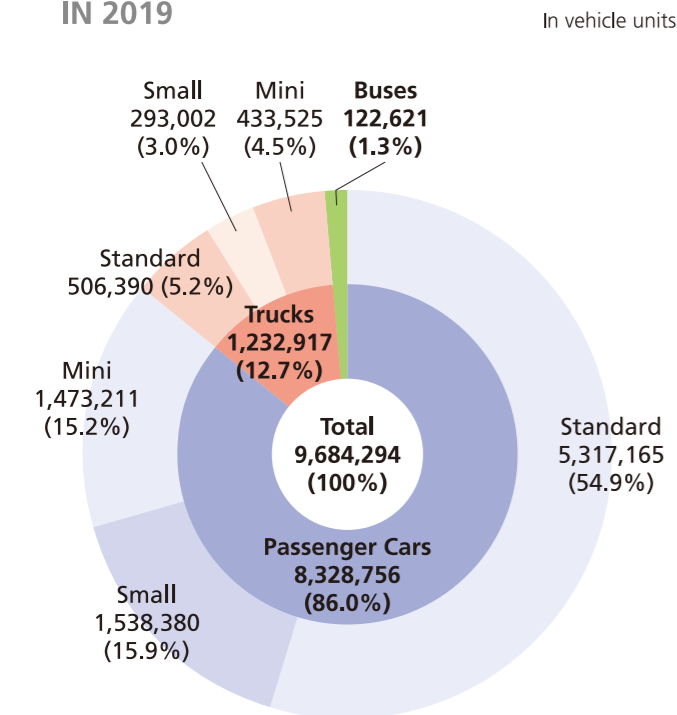
Note: Figures are rounded off to the nearest thousand.

Sources: Industrial Statistics, Labor Force Survey, Input-Output Tables for Japan, Ministry of Internal Affairs and Communications' Statistics Bureau; Ministry of Economy, Trade and Industry

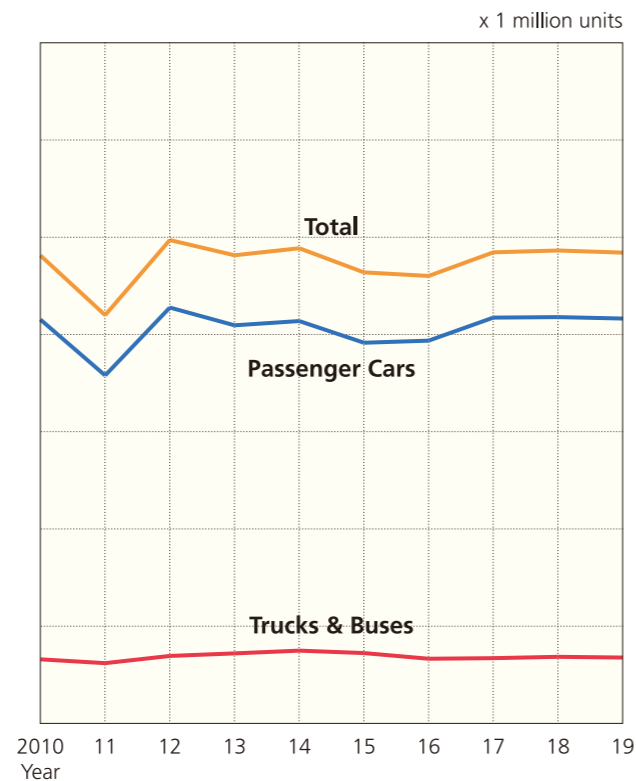
# Motor Vehicle Production Totals 9.68 Million Units

In 2019 motor vehicle production in Japan stood at 9.68 million units, down 0.5% from 2018, registering a decline for the first time in three years. Passenger car production slipped 0.4% to a total of 8.33 million units, with standard cars increasing 1.2% to 5.32 million units, but small cars falling 4.2% to 1.54 million units and minicars dropping 1.6% to 1.47 million units. Meanwhile, truck production shrank 1.9% from the previous year to 1.23 million units, whereas bus production grew 8.3% to 123,000 units.

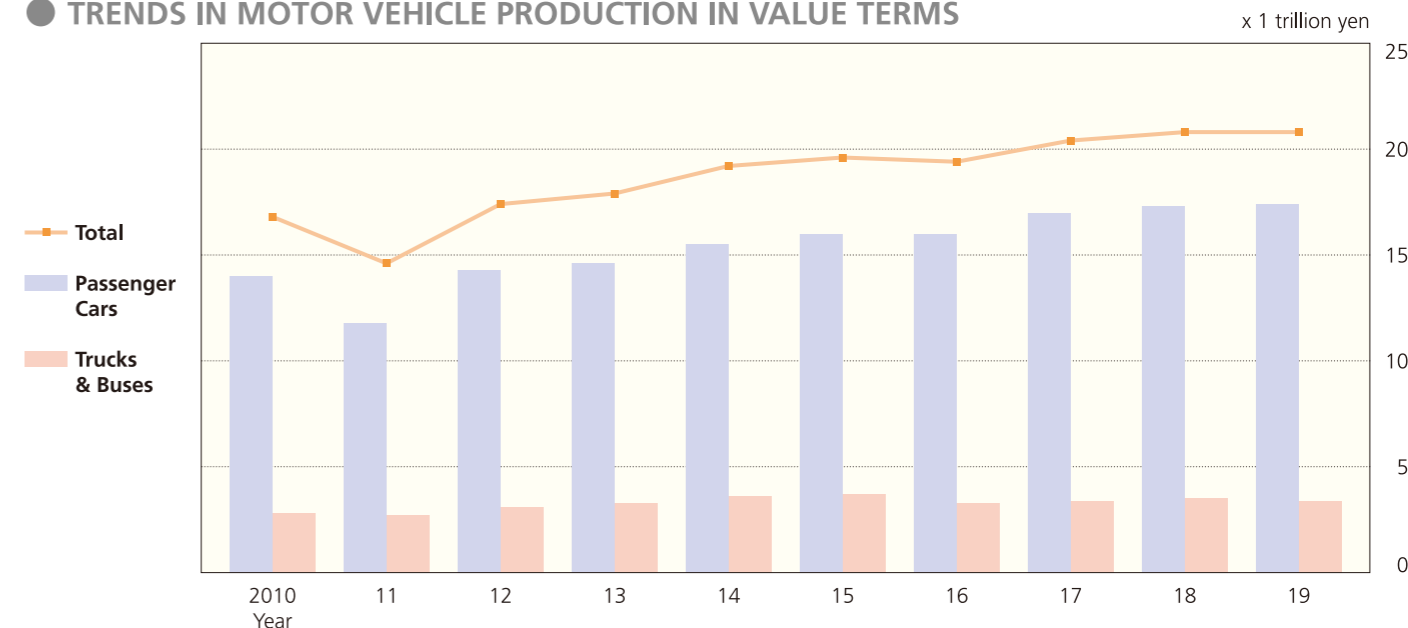
## MOTOR VEHICLE PRODUCTION BY TYPE IN 2019



## TRENDS IN MOTOR VEHICLE PRODUCTION



## TRENDS IN MOTOR VEHICLE PRODUCTION IN VALUE TERMS



## MOTOR VEHICLE PRODUCTION IN VALUE TERMS

Source: Ministry of Economy, Trade and Industry

## MOTOR VEHICLE PRODUCTION

Year	Passenger Cars						
	Standard	Small	Mini	Subtotal	Chg. (%)	Standard	Small
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
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
2018	5,256,226	1,605,162	1,497,898	8,359,286	100.1	517,641	306,259
2019	5,317,165	1,538,380	1,473,211	8,328,756	99.6	506,390	293,002

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), "mini" (660cc and under); see page 47 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 been treated as components since 1988. 3. "Chg. (%)" means change from the previous year (with the previous year's result indexed at 100).

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
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
433,211	1,257,111	103.1	113,197	92.0	9,729,594	100.4	2018
433,525	1,232,917	98.1	122,621	108.3	9,684,294	99.5	2019

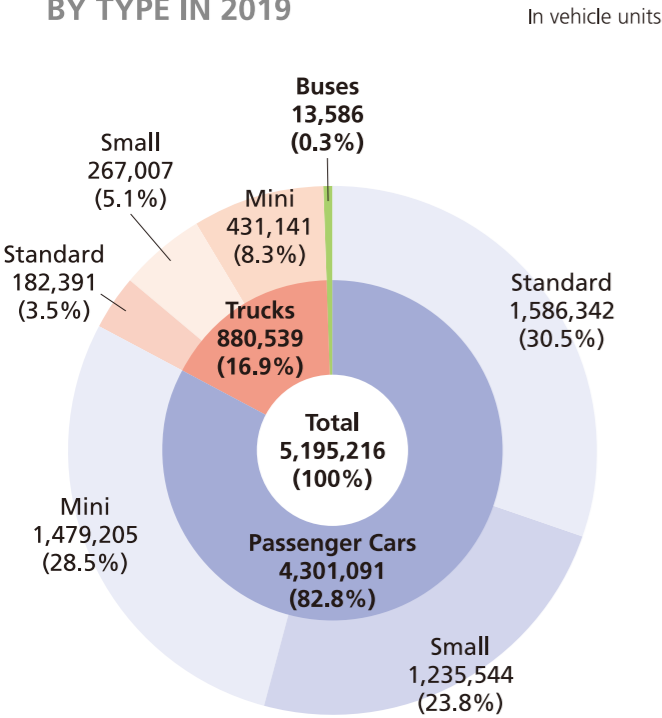
and "mini" (660cc and under); see page 47 for details. 2. KD sets have been excluded since 1979; they represent less than 60% of the cost of compositional components per vehicle and have been treated as components since 1988. 3. "Chg. (%)" means change from the previous year (with the previous year's result indexed at 100).

Sources: Japan Automobile Manufacturers Association; Current Survey of Production, Ministry of Economy, Trade and Industry

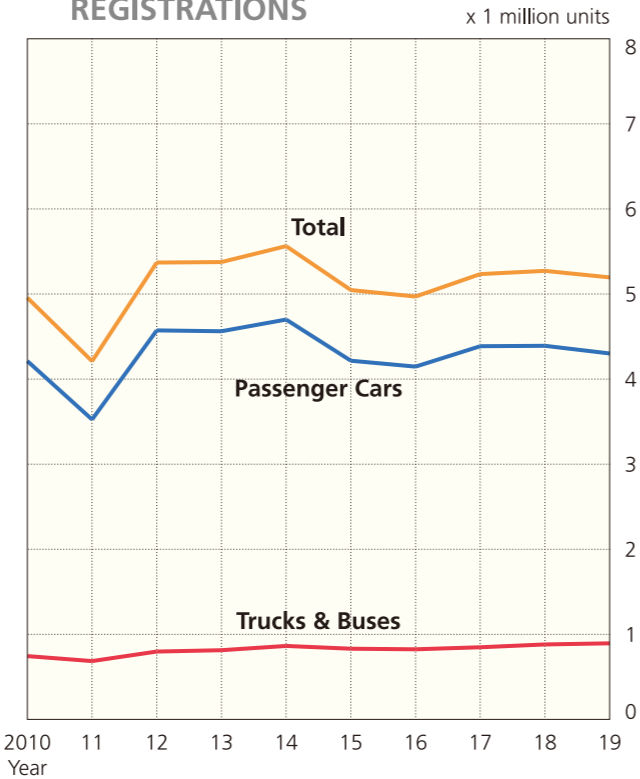
Motor Vehicle Sales Total 5.20 Million Units

Passenger car and commercial vehicle demand in Japan in 2019 stood at 5.20 million units, a 1.5% decrease from the previous year. Total passenger car sales shrank 2.1% to 4.30 million units, with small cars and minicars dropping 5.9% to 1.24 million units and 1.1% to 1.48 million units, respectively, but standard cars rising 0.2% to 1.59 million units. Meanwhile, sales of trucks increased 1.5% over 2018 to 881,000 units, whereas sales of buses declined 0.8% to 14,000 units.

NEW MOTOR VEHICLE REGISTRATIONS BY TYPE IN 2019



TRENDS IN NEW MOTOR VEHICLE REGISTRATIONS



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
2018	1,495,706	33,907	208,822	185,689	1,924,124	104.4
2019	1,479,205	52,543	196,034	182,564	1,910,346	99.3

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

Source: Japan Mini Vehicles Association

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
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
2018	1,582,828	1,312,626	1,495,706	4,391,160	100.1	180,266	258,521	428,418	867,205	104.2
2019	1,586,342	1,235,544	1,479,205	4,301,091	97.9	182,391	267,007	431,141	880,539	101.5

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

In vehicle units

Buses				Total	Chg. (%)	Total Vehicles		Total Mini-Vehicles		Year
Large	Small	Subtotal	Chg. (%)				Chg. (%)		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
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
5,131	8,571	13,702	87.9	5,272,067	100.7	3,347,943	98.7	1,924,124	104.4	2018
4,876	8,710	13,586	99.2	5,195,216	98.5	3,284,870	98.1	1,910,346	99.3	2019

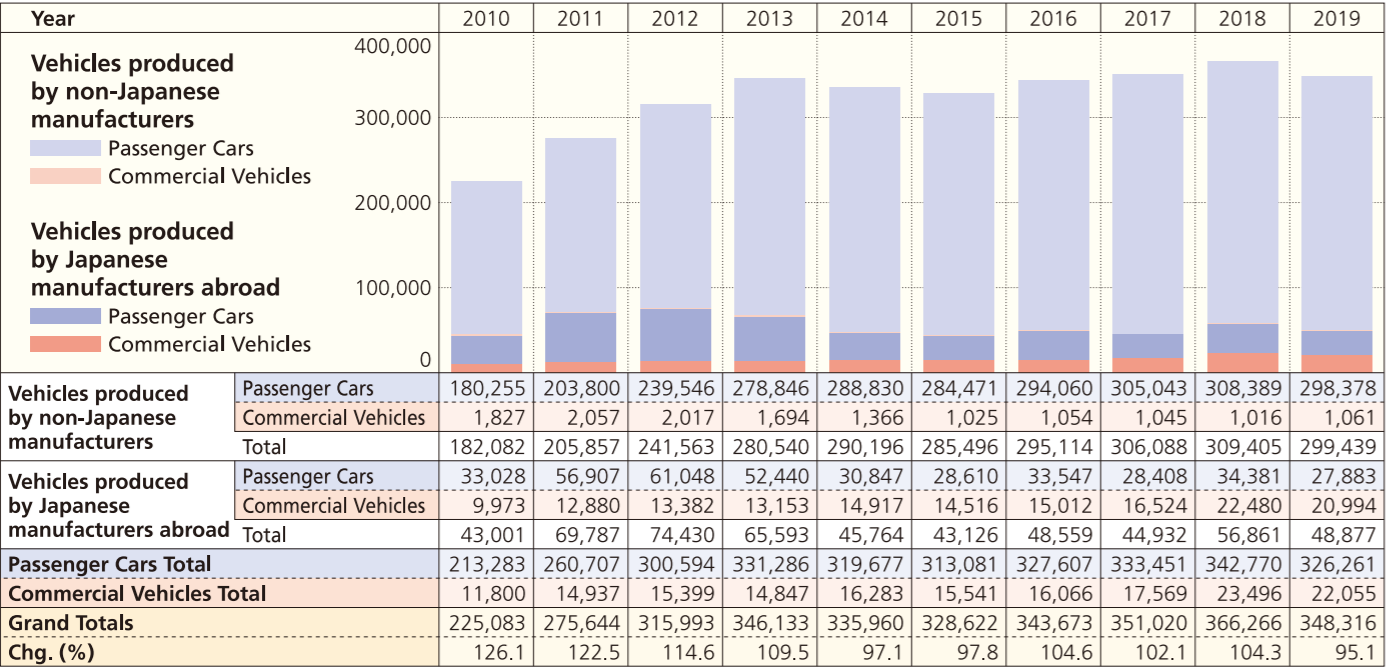
includes imported cars. 4. "Chg. (%)" means change from the previous year (with the previous year's result indexed at 100).

Sources: Japan Automobile Dealers Association; Japan Mini Vehicles Association

# 348,000 New Imported Vehicles Sold in Total

Sales of new imported vehicles in Japan in 2019 totalled 348,000 units, down 4.9% from the previous year, with new passenger cars dropping 4.8% to 326,000 units and new commercial vehicles (trucks and buses) falling 6.1% to 22,000 units. Meanwhile, sales of used imported vehicles rose 2.2% from the previous year to 578,000 units, with used passenger cars and used trucks growing 2.2% to 558,000 units and 3.4% to 16,000 units, respectively.

## TRENDS IN IMPORTED MOTOR VEHICLE SALES



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
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
2018	358,221	106.3	26,633	839	385,693	107.8	540,008
2019	335,766	93.7	24,938	971	361,675	93.8	585,578

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

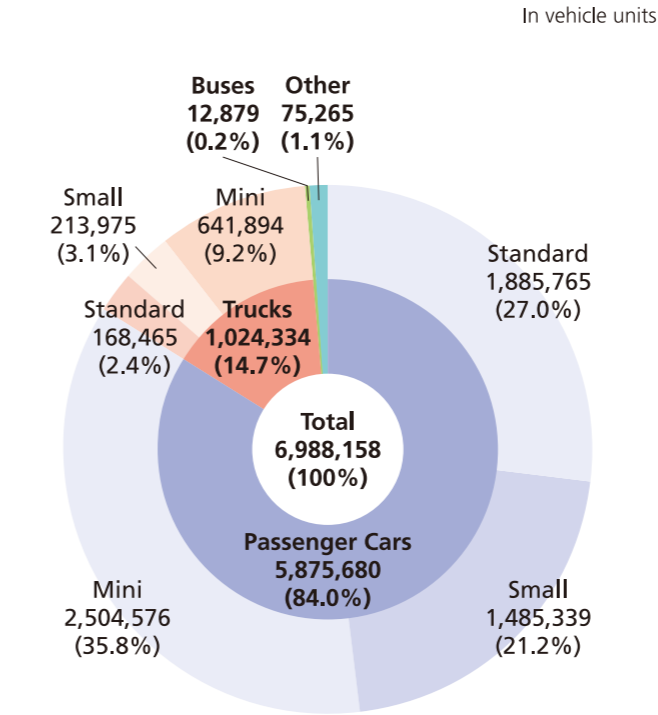
Year	Passenger Cars	Chg. (%)	Trucks	Chg. (%)	Special-Purpose Vehicles	Chg. (%)	Other	Total	Chg. (%)
2010	461,050	97.9	13,381	106.6	7,878	78.1	182	482,491	97.7
2011	462,435	100.3	14,370	107.4	6,756	85.8	164	483,725	100.3
2012	487,675	105.5	14,636	101.9	5,469	81.0	248	508,028	105.0
2013	487,750	100.0	15,428	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
2018	546,336	101.0	15,890	99.4	2,780	94.4	184	565,190	100.9
2019	558,481	102.2	16,433	103.4	2,562	92.2	195	577,671	102.2

Notes: 1. For motor vehicle classifications in Japan, see page 47. 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

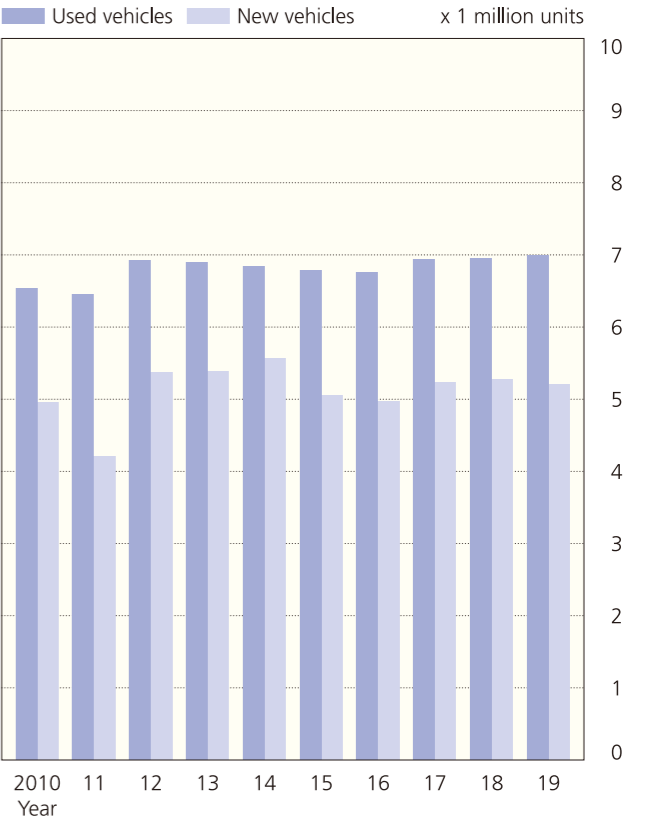
# Used Vehicle Sales Total 6.99 Million Units

In 2019 sales of used motor vehicles grew 0.5% from the previous year to reach 6.99 million units. Used passenger car sales totalled 5.88 million units, up 1.2% from the previous year, with standard passenger cars climbing 2.8% to 1.89 million units and minicars increasing 2.2% to 2.50 million units, but small cars dropping 2.5% to 1.49 million units. Sales of used trucks and sales of used buses both fell 2.8%, to 1.02 million units and 13,000 units, respectively.

## USED VEHICLE SALES BY TYPE IN 2019



## TRENDS IN NEW AND USED MOTOR VEHICLE SALES



## USED MOTOR VEHICLE SALES

In vehicle units

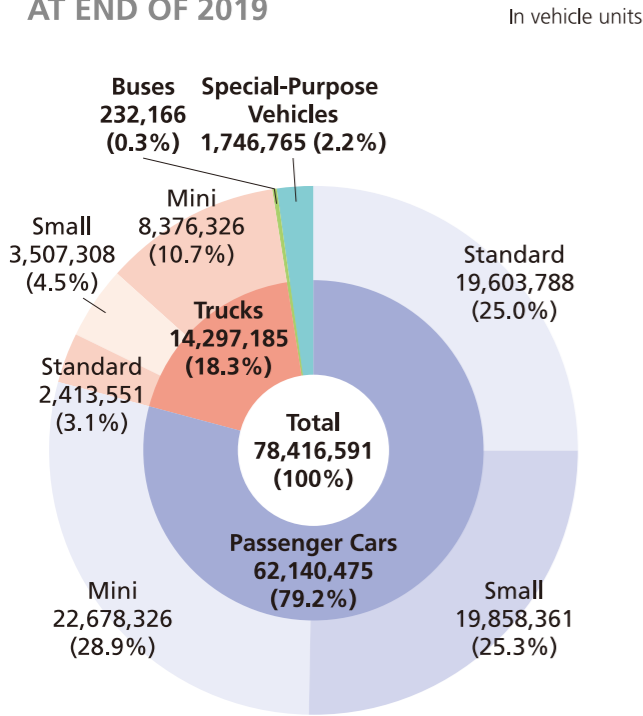
Year	Passenger Cars					Trucks					Buses		Other		Total	
	Standard	Small	Mini	Subtotal	Chg. (%)	Standard	Small	Mini	Subtotal	Chg. (%)		Chg. (%)		Chg. (%)		Chg. (%)
1985	160,150	3,295,092	356,726	3,811,968	100.9	139,459	589,321	1,125,545	1,854,325	108.3	11,655	103.1	44,620	116.7	5,722,568	103.3
1990	304,193	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
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
2018	1,834,306	1,523,537	2,449,940	5,807,783	100.0	174,106	216,026	663,976	1,054,108	101.2	13,256	101.5	76,251	100.4	6,951,398	100.2
2019	1,885,765	1,485,339	2,504,576	5,875,680	101.2	168,465	213,975	641,894	1,024,334	97.2	12,879	97.2	75,265	98.7	6,988,158	100.5

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 47 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

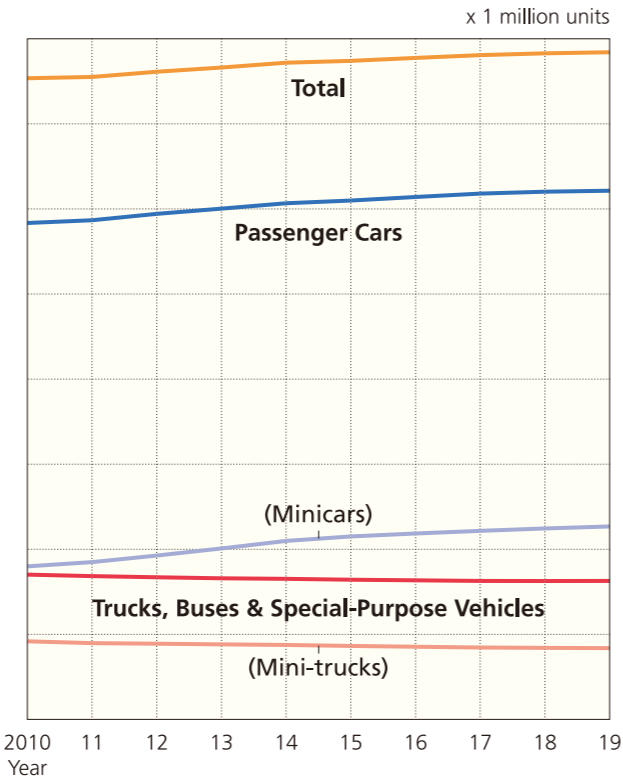
A Total of 78.42 Million Motor Vehicles in Use

At the end of December 2019, motor vehicles in use in Japan (excluding motorcycles) totalled 78.42 million units, a 0.2% increase over the previous year. Passenger cars in use increased 0.2% to 62.14 million units, with standard and minicars growing 2.1% and 1.0% to 19.60 million and 22.68 million units, respectively, but small cars dropping 2.6% to 19.86 million units. Meanwhile, trucks in use levelled off at 14.3 million units compared to the previous year, whereas buses in use slipped 0.5% from 2018 to 232,000 units. At the end of March 2019, the average service life of motor vehicles in Japan was 13.26 years for passenger cars, 15.17 years for trucks, and 18.36 years for buses.

MOTOR VEHICLES IN USE BY TYPE AT END OF 2019



TRENDS IN MOTOR VEHICLES IN USE

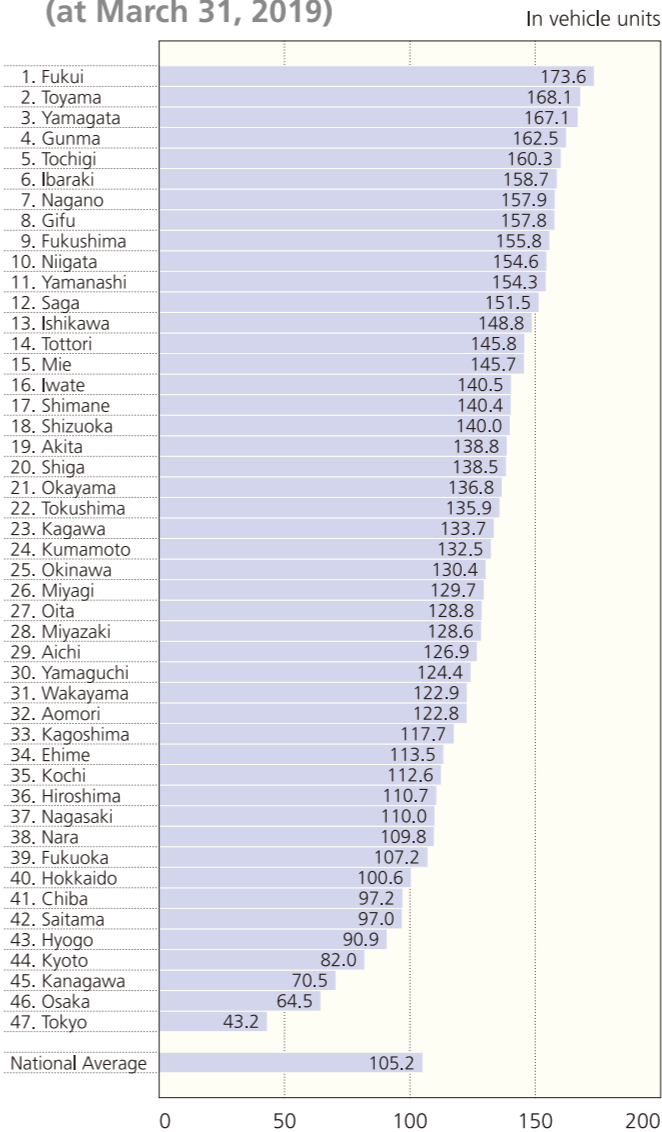


MOTOR VEHICLES IN USE (at end of every calendar year)

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
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
2018	19,198,666	20,383,197	22,444,053	62,025,916	100.4	2,382,877	3,506,007	8,407,229	14,296,113	99.8
2019	19,603,788	19,858,361	22,678,326	62,140,475	100.2	2,413,551	3,507,308	8,376,326	14,297,185	100.0

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, 2019)



Source: Automobile Inspection & Registration Information Association

PASSENGER CARS IN USE BY YEAR OF FIRST REGISTRATION

At March 31, 2019

Year of First Registration	Vehicles in Use	% of "Vehicles in Use" Total
April 2018-March 2019	2,836,599	7.19
April 2017-March 2018	2,839,306	7.20
April 2016-March 2017	2,800,925	7.10
April 2015-March 2016	2,491,284	6.32
April 2014-March 2015	2,459,920	6.24
April 2013-March 2014	2,683,017	6.80
April 2012-March 2013	2,530,049	6.41
April 2011-March 2012	2,279,336	5.78
April 2010-March 2011	2,155,008	5.46
April 2009-March 2010	2,241,777	5.68
April 2008-March 2009	1,767,373	4.48
April 2007-March 2008	1,830,283	4.64
April 2006-March 2007	1,737,599	4.41
April 2005-March 2006	1,583,479	4.01
-March 2005	7,209,725	18.28
Total "Vehicles in Use"	39,445,680	100

AVERAGE AGE BY TYPE

In years

Year	Passenger Cars	Trucks	Buses
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
2018	8.60	11.41	11.81
2019	8.65	11.42	11.83

AVERAGE SERVICE LIFE BY TYPE

In years

Year	Passenger Cars	Trucks	Buses
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
2018	13.24	14.72	17.69
2019	13.26	15.17	18.36

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

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
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
112,627	120,596	233,223	99.9	1,734,185	100.8	78,289,437	100.3	174,657	20,425	2018
112,169	119,997	232,166	99.5	1,746,765	100.7	78,416,591	100.2	180,662	21,420	2019

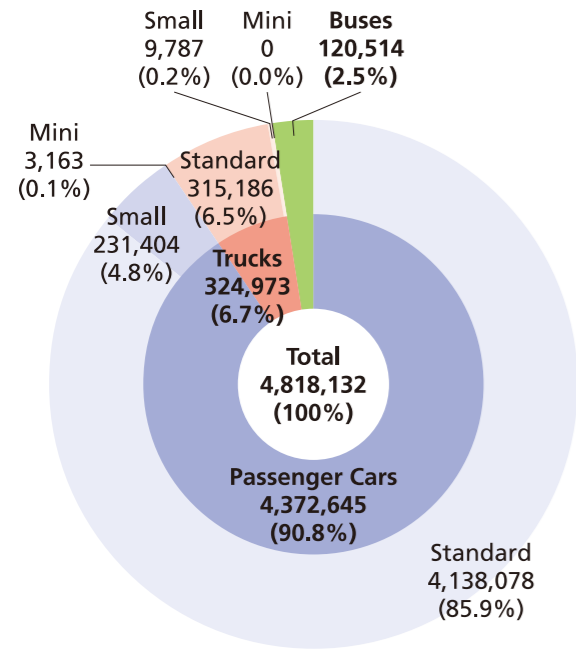
snowmobiles, etc., that are identified as special-purpose vehicles by special registration numbers. 2. "Three-wheeled vehicles" includes three-wheeled passenger cars, trucks, and special-purpose vehicles. Source: Ministry of Land, Infrastructure, Transport and Tourism

## Motor Vehicle Exports Total 4.82 Million Units

Exports of motor vehicles in 2019 totalled 4.82 million units, with passenger car and bus exports rising 0.3% and 10% from the previous year to 4.37 million units and 121,000 units, respectively. Meanwhile, truck exports fell 7.2% from 2018 to 325,000 units.

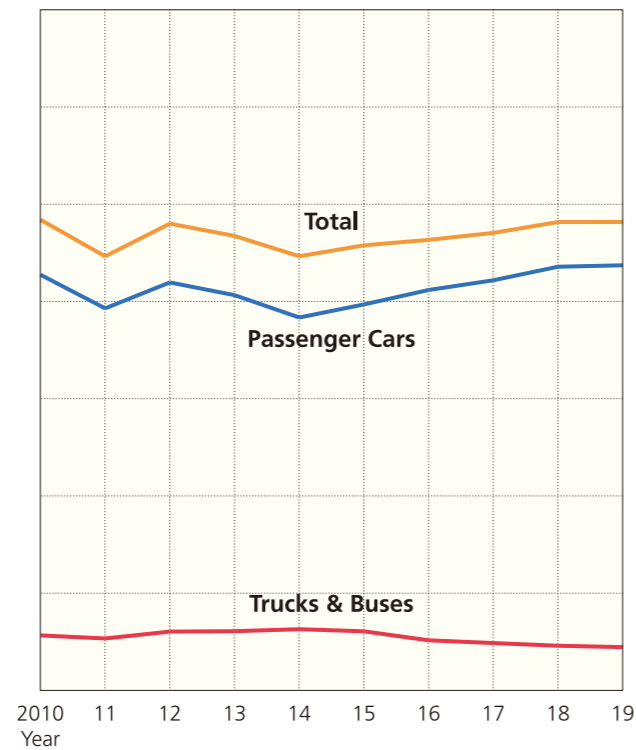
### MOTOR VEHICLE EXPORTS BY TYPE IN 2019

In vehicle units



### TRENDS IN MOTOR VEHICLE EXPORTS

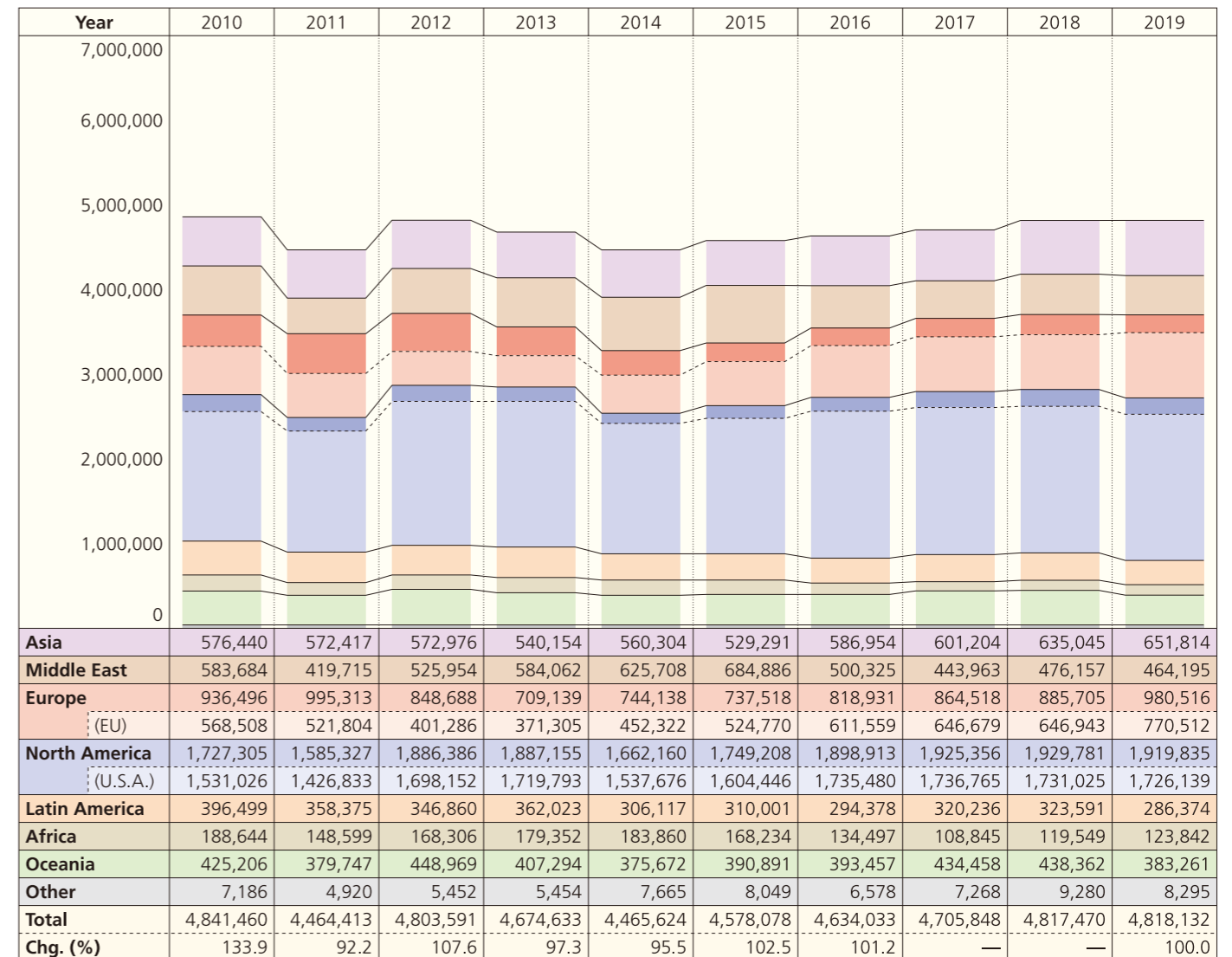
x 1 million units



### 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).

### MOTOR VEHICLE EXPORTS

Year	Passenger Cars						
	Standard	Small	Mini	Subtotal	Chg. (%)	Standard	Small
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
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
2018	4,120,080	230,684	7,018	4,357,782	103.3	331,004	19,082
2019	4,138,078	231,404	3,163	4,372,645	100.3	315,186	9,787

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. Since December 2017, export figures from one JAMA member manufacturer have not been

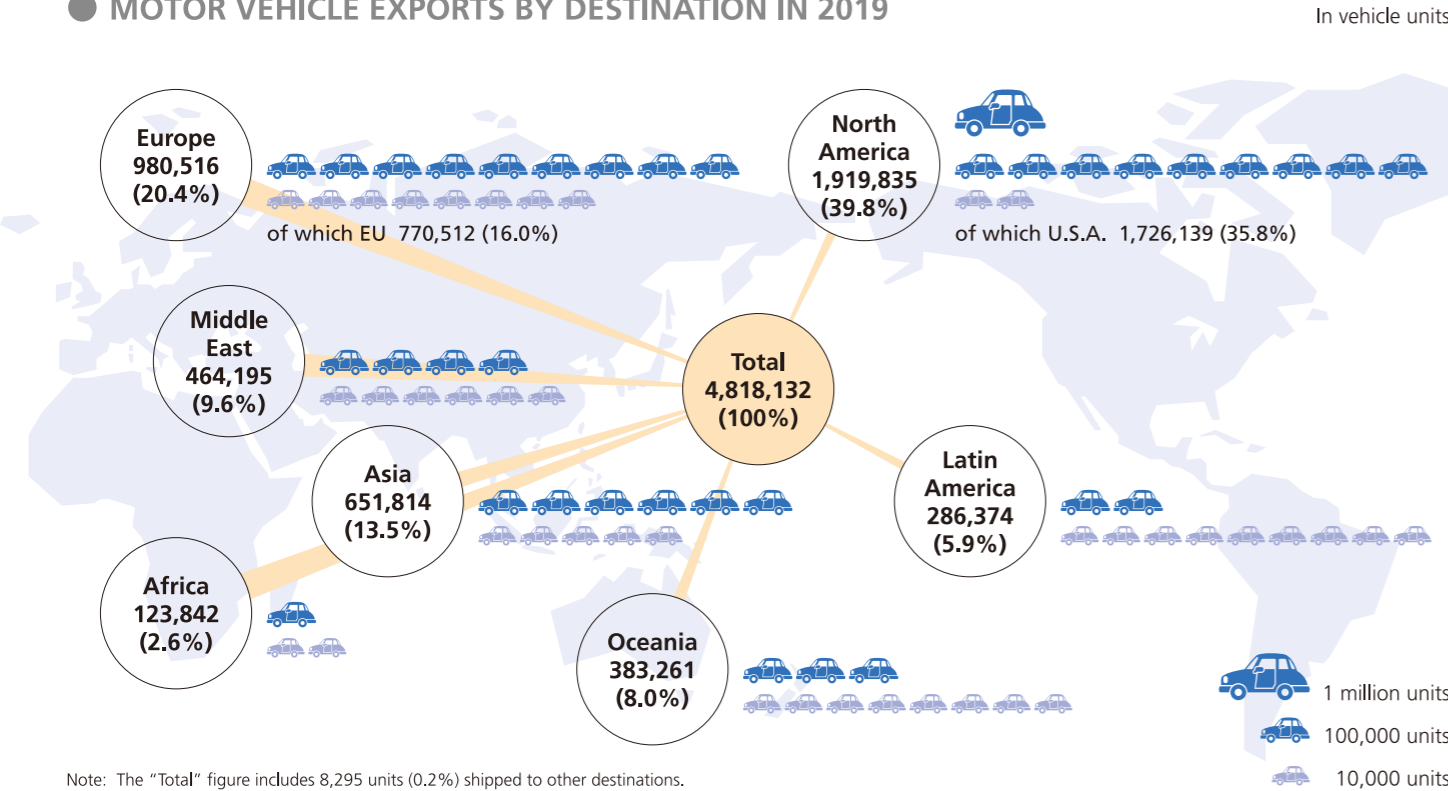
Trucks			Buses		Total		Year
Mini	Subtotal	Chg. (%)		Chg. (%)		Chg. (%)	
13,892	351,611	120.9	9,579	141.6	1,086,776	126.7	1970
22,071	833,673	95.3	16,653	104.3	2,677,612	102.3	1975
73,177	1,953,685	137.2	66,116	179.4	5,966,961	130.8	1980
11,374	2,238,104	108.0	65,606	116.7	6,730,472	110.2	1985
8	1,309,121	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
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
5	350,091	—	109,597	—	4,817,470	—	2018
0	324,973	92.8	120,514	110.0	4,818,132	100.0	2019

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 available. 5. "Chg. (%)" means change from the previous year (with the previous year's result indexed at 100). Source: Japan Automobile Manufacturers Association

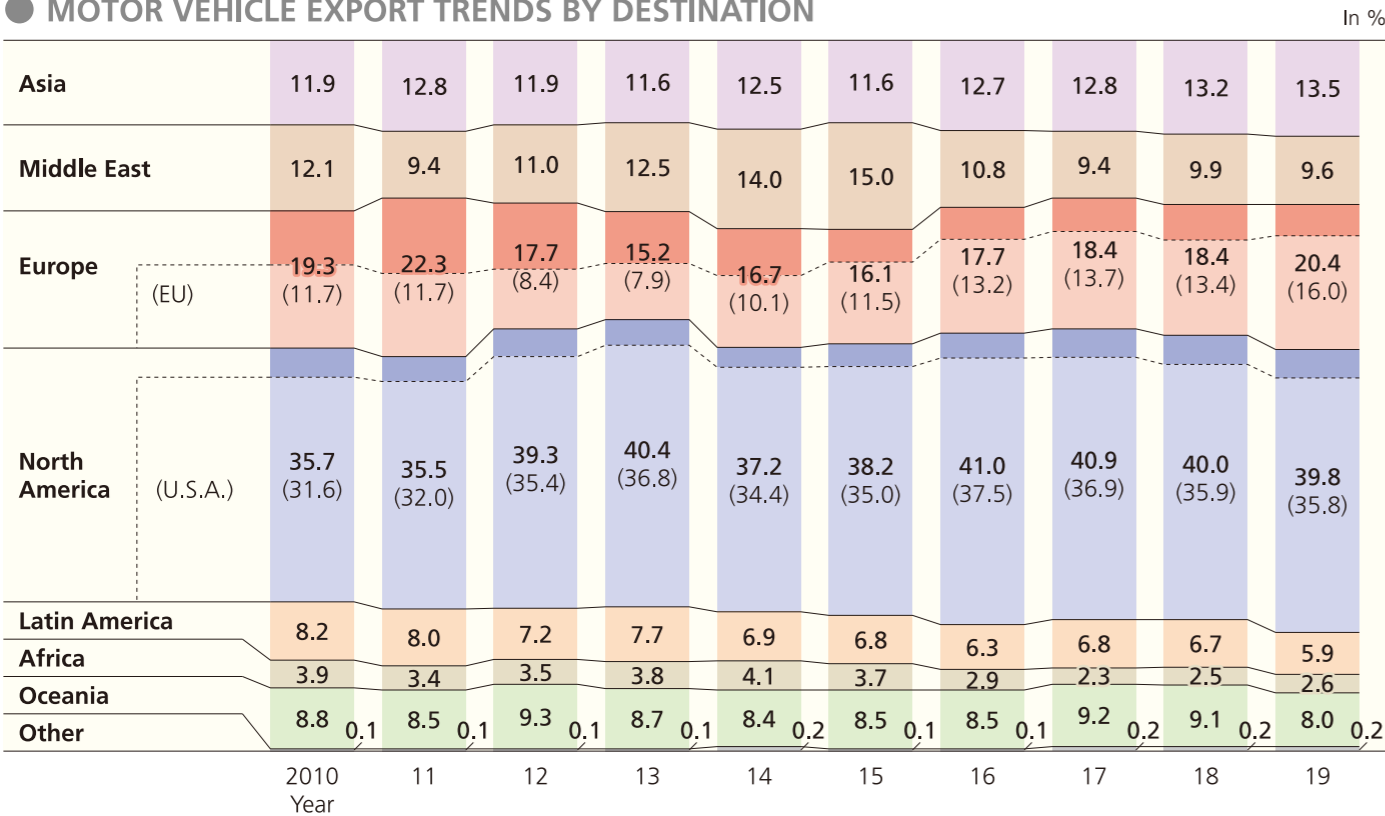
A Rise in Motor Vehicle Exports to Europe, Asia, and Africa

Motor vehicle exports increased in 2019 from the previous year to Europe (981,000 units), Asia (652,000 units), and Africa (124,000 units), but decreased to North America (1.92 million units), the Middle East (464,000 units), Oceania (383,000 units), and Latin America (286,000 units).

MOTOR VEHICLE EXPORTS BY DESTINATION IN 2019



MOTOR VEHICLE EXPORT TRENDS BY DESTINATION



MOTOR VEHICLE EXPORTS BY DESTINATION & BY VEHICLE TYPE IN 2019

In vehicle units

Destination		Passenger Cars				Trucks				Buses	Total
		Standard	Small	Mini	Subtotal	Standard	Small	Mini	Subtotal		
Asia	South Korea	21,526	674	0	22,200	407	0	0	407	0	22,607
	China	250,494	0	0	250,494	0	0	0	0	0	250,494
	Taiwan	93,547	4,894	0	98,441	13,106	0	0	13,106	517	112,064
	Hong Kong	9,248	4,560	121	13,929	4,510	524	0	5,034	791	19,754
	Thailand	1,548	76	0	1,624	6,544	0	0	6,544	12,162	20,330
	Singapore	13,950	3,883	0	17,833	6,893	271	0	7,164	255	25,252
	Malaysia	28,277	4,656	0	32,933	13,219	648	0	13,867	1,107	47,907
	Philippines	12,029	939	1	12,969	7,866	0	0	7,866	26,136	46,971
	Indonesia	12,805	2,211	0	15,016	15,556	0	0	15,556	4,918	35,490
	Pakistan	81	3,900	0	3,981	2,195	0	0	2,195	578	6,754
	Other	44,035	908	599	45,542	11,598	4,560	0	16,158	2,491	64,191
	Subtotal	487,540	26,701	721	514,962	81,894	6,003	0	87,897	48,955	651,814
Middle East	Bahrain	10,076	60	0	10,136	1,066	0	0	1,066	1,326	12,528
	Saudi Arabia	114,542	177	0	114,719	18,950	0	0	18,950	2,659	136,328
	Kuwait	36,806	125	0	36,931	2,304	0	0	2,304	1,913	41,148
	Oman	32,135	261	0	32,396	11,338	0	0	11,338	2,455	46,189
	Israel	41,067	4,735	0	45,802	1,314	0	0	1,314	0	47,116
	United Arab Emirates	86,719	1,054	0	87,773	12,406	0	0	12,406	2,812	102,991
	Qatar	17,364	418	0	17,782	1,723	0	0	1,723	1,730	21,235
	Other	44,123	493	0	44,616	10,219	0	0	10,219	1,825	56,660
	Subtotal	382,832	7,323	0	390,155	59,320	0	0	59,320	14,720	464,195
Europe	Sweden	26,182	829	0	27,011	0	0	0	0	0	27,011
	Denmark	9,328	3,107	0	12,435	0	0	0	0	0	12,435
	UK	158,517	43,124	0	201,641	0	0	0	0	0	201,641
	Netherlands	17,224	5,450	0	22,674	0	0	0	0	0	22,674
	Belgium	19,112	2,578	0	21,690	0	0	0	0	0	21,690
	France	42,314	17,227	2,329	61,870	0	0	0	0	0	61,870
	Germany	122,323	19,209	0	141,532	0	0	0	0	0	141,532
	Spain	73,798	2,910	0	76,708	0	0	0	0	0	76,708
	Italy	40,015	18,562	0	58,577	6,090	0	0	6,090	0	64,667
	Finland	9,952	437	0	10,389	0	0	0	0	0	10,389
	Poland	36,833	1,817	0	38,650	0	0	0	0	0	38,650
	Austria	16,592	4,414	0	21,006	48	0	0	48	31	21,085
	Greece	1,418	3,706	0	5,124	0	0	0	0	0	5,124
	Other	52,971	9,749	0	62,720	2,316	0	0	2,316	0	65,036
	Subtotal	626,579	133,119	2,329	762,027	8,454	0	0	8,454	31	770,512
	Norway	17,524	902	43	18,469	0	0	0	0	0	18,469
	Switzerland	15,506	2,699	70	18,275	0	0	0	0	0	18,275
	Russia	138,042	634	0	138,676	4,707	0	0	4,707	97	143,480
	Turkey	2,856	1,282	0	4,138	1,566	0	0	1,566	0	5,704
	Ukraine	21,064	154	0	21,218	546	0	0	546	0	21,764
	Other	1,889	423	0	2,312	0	0	0	0	0	2,312
	Subtotal	823,460	139,213	2,442	965,115	15,273	0	0	15,273	128	980,516
North America	Canada	188,708	1,027	0	189,735	3,961	0	0	3,961	0	193,696
	U.S.A.	1,692,045	45	0	1,692,090	34,049	0	0	34,049	0	1,726,139
	Subtotal	1,880,753	1,072	0	1,881,825	38,010	0	0	38,010	0	1,919,835
Latin America	Mexico	71,686	20,218	0	91,904	15,407	0	0	15,407	7,448	114,759
	Puerto Rico	20,841	5	0	20,846	38	0	0	38	0	20,884
	Colombia	17,156	299	0	17,455	11,270	0	0	11,270	1,122	29,847
	Ecuador	5,181	309	0	5,490	2,294	0	0	2,294	1,090	8,874
	Peru	11,165	456	0	11,621	2,692	0	0	2,692	1,695	16,008
	Chile	30,005	3,696	0	33,701	2,486	0	0	2,486	208	36,395
	Brazil	12,041	427	0	12,468	0	0	0	0	0	12,468
	Other	28,466	4,136	0	32,602	8,842	229	0	9,071	5,466	47,139
	Subtotal	196,541	29,546	0	226,087	43,029	229	0	43,258	17,029	286,374
Africa	Algeria	1,162	0	0	1,162	0	0	0	0	0	1,162
	Egypt	3,288	0	0	3,288	11,321	2,232	0	13,553	4,859	21,700
	Nigeria	421	0	0	421	280	0	0	280	468	1,169
	Kenya	151	33	0	184	5,495	0	0	5,495	6	5,685
	South Africa	27,334	1,480	0	28,814	8,878	1,196	0	10,074	19,376	58,264
	Other	17,580	691	0	18,271	9,489	43	0	9,532	8,059	35,862
	Subtotal	49,936	2,204	0	52,140	35,463	3,471	0	38,934	32,768	123,842
Oceania	Australia	276,123	17,857	0	293,980	31,036	29	0	31,065	3,119	328,164
	New Zealand	33,310	6,943	0	40,253	4,432	4	0	4,436	554	45,243
	Other	5,182	533	0	5,715	2,189	51	0	2,240	1,899	9,854
	Subtotal	314,615	25,333	0	339,948	37,657	84	0	37,741	5,572	383,261
Other		2,401	12	0	2,413	4,540	0	0	4,540	1,342	8,295
Grand Totals		4,138,078	231,404	3,163	4,372,645	315,186	9,787	0	324,973	120,514	4,818,132

Note: Since December 2017, export figures from one JAMA member manufacturer have not been available.

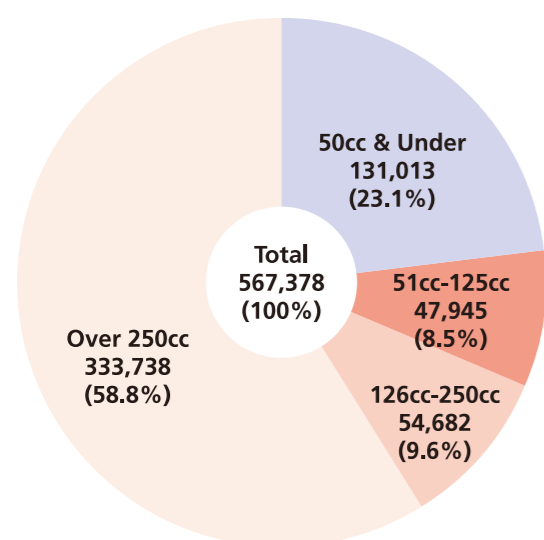
Source: Japan Automobile Manufacturers Association

## Motorcycle Production Totals 567,000 Units

Overall domestic motorcycle production in 2019 declined 13% from the previous year to 567,000 units. By engine capacity, there was a decrease in production in every category, with Class 1 motor-driven cycles (50cc and under) falling 7.0% to 131,000 units, Class 2 motor-driven cycles (51cc to 125cc) plunging 19.4% to 48,000 units, mini-sized motorcycles (126cc to 250cc) dipping 11.3% to 55,000 units, and small-sized motorcycles (over 250cc) declining 14.4% to 334,000 units. The combined total for larger motorcycles (all those over 50cc) dropped 14.6% to 436,000 units.

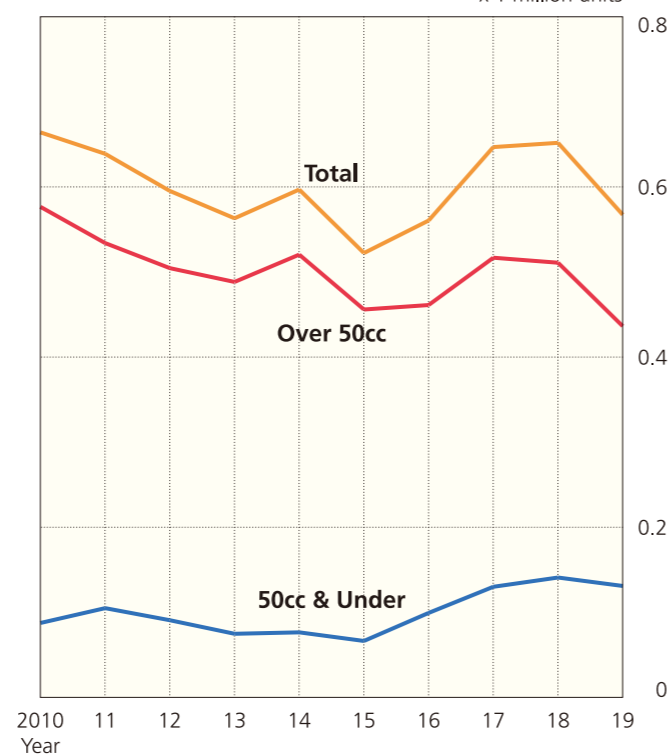
### ● MOTORCYCLE PRODUCTION BY ENGINE CAPACITY IN 2019

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				Total	Chg. (%)
		Motor-Driven Cycles Class 2 (51cc-125cc)	Mini-Sized Motorcycles (126cc-250cc)	Small-Sized Motorcycles (Over 250cc)	Subtotal		
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
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
2018	140,921	59,451	61,658	389,854	510,963	651,884	100.8
2019	131,013	47,945	54,682	333,738	436,365	567,378	87.0

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).

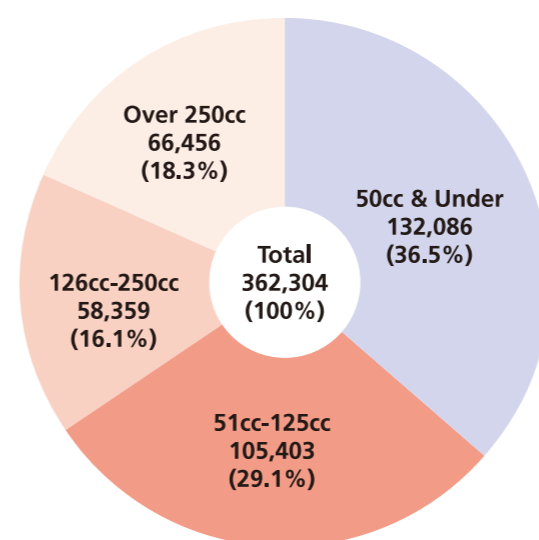
Source: Japan Automobile Manufacturers Association

## Motorcycle Sales Total 362,000 Units

Domestic motorcycle sales in 2019 finished at 362,000 units, down 1.8% from the previous year. By engine capacity, whereas sales of Class 1 motor-driven cycles (50cc and under) fell 7.7% to 132,000 units and sales of Class 2 motor-driven cycles (51cc to 125cc) slipped 0.1% to 105,000 units, sales of mini-sized motorcycles (126cc to 250cc) and small-sized motorcycles (over 250cc) climbed 2.0% to 58,000 units and 5.1% to 66,000 units, respectively. Overall sales of motorcycles with engine capacity over 50cc totalled 230,000 units, an increase of 1.9% over 2018.

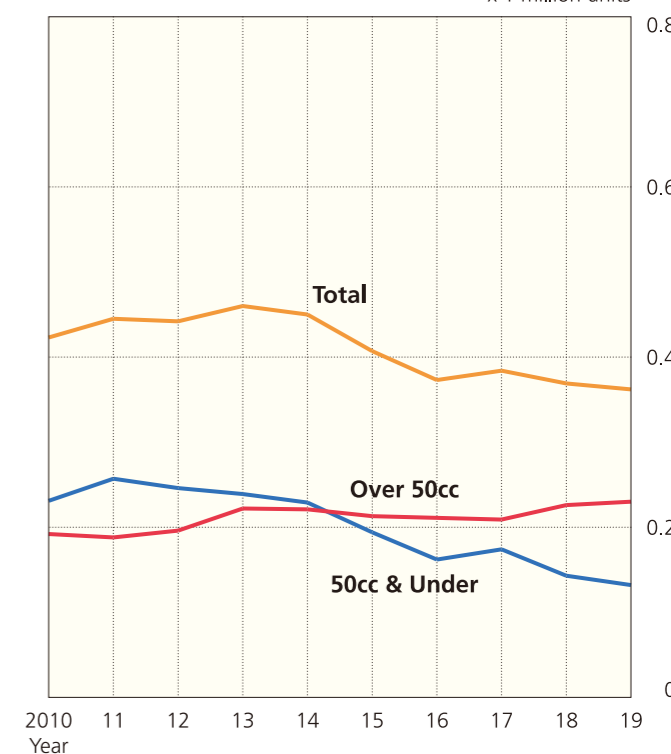
### ● MOTORCYCLE SALES BY ENGINE CAPACITY IN 2019

In vehicle units



### ● TRENDS IN MOTORCYCLE SALES

x 1 million units



### ● MOTORCYCLE SALES

In vehicle units

Year	Motor-Driven Cycles Class 1 (50cc & Under)	Over 50cc				Total	Chg. (%)
		Motor-Driven Cycles Class 2 (51cc-125cc)	Mini-Sized Motorcycles (126cc-250cc)	Small-Sized Motorcycles (Over 250cc)	Subtotal		
1980	1,978,426	200,238	80,799	97,281	378,318	2,356,744	122.0
1985	1,646,115	130,574	167,213	143,324	441,111	2,087,226	101.5
1990	1,213,512	169,618	165,692	103,876	439,186	1,652,698	98.1
1995	884,718	138,115	104,175	115,430	357,720	1,242,438	102.2
2000	558,459	102,116	75,887	83,963	261,966	820,425	93.6
2005	470,922	88,747	102,038	76,841	267,626	738,548	100.7
2010	231,247	96,368	37,645	58,108	192,121	423,368	97.7
2011	257,045	95,702	38,883	53,362	187,947	444,992	105.1
2012	246,095	90,291	45,306	60,715	196,312	442,407	99.4
2013	238,786	100,947	55,441	65,289	221,677	460,463	104.1
2014	228,918	96,249	54,310	70,151	220,710	449,628	97.6
2015	193,842	94,851	51,277	66,621	212,749	406,591	90.4
2016	162,130	101,424	46,429	62,908	210,761	372,891	91.7
2017	174,259	88,765	56,586	64,003	209,354	383,613	102.9
2018	143,129	105,536	57,229	63,220	225,985	369,114	96.2
2019	132,086	105,403	58,359	66,456	230,218	362,304	98.2

Notes: 1. Motor-driven cycle (Class 1 and Class 2) figures represent shipments to domestic dealers. 2. "Chg. (%)" means change from the previous year (with the previous year's result indexed at 100).

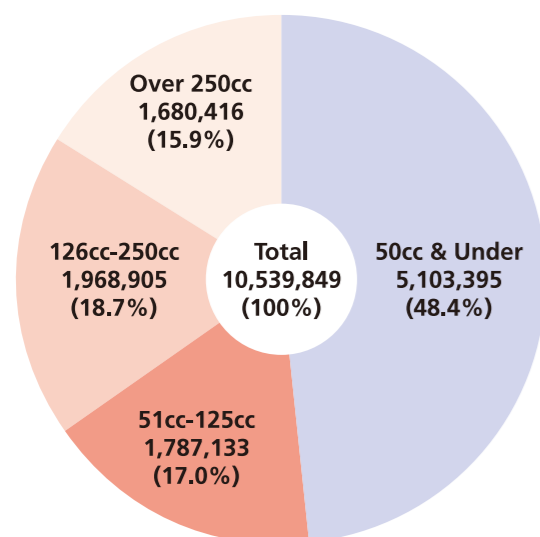
Sources: Japan Mini Vehicles Association; Japan Automobile Manufacturers Association

## 10.54 Million Motorcycles in Use

At March 31, 2019, motorcycles in use in Japan totalled 10.54 million units, down 1.8% from the previous year. By engine capacity, Class 1 motor-driven cycles, accounting for 48.4% of all motorcycles in use, dropped 4.7% to 5.10 million units in 2019, whereas Class 2 motor-driven cycles, mini-sized motorcycles, and small-sized motorcycles in use rose 2.0%, 0.1%, and 1.4% to 1.79 million, 1.97 million, and 1.68 million units, respectively. Thus, motorcycles over 50cc in use increased 1.1%, to a total of 5.44 million units.

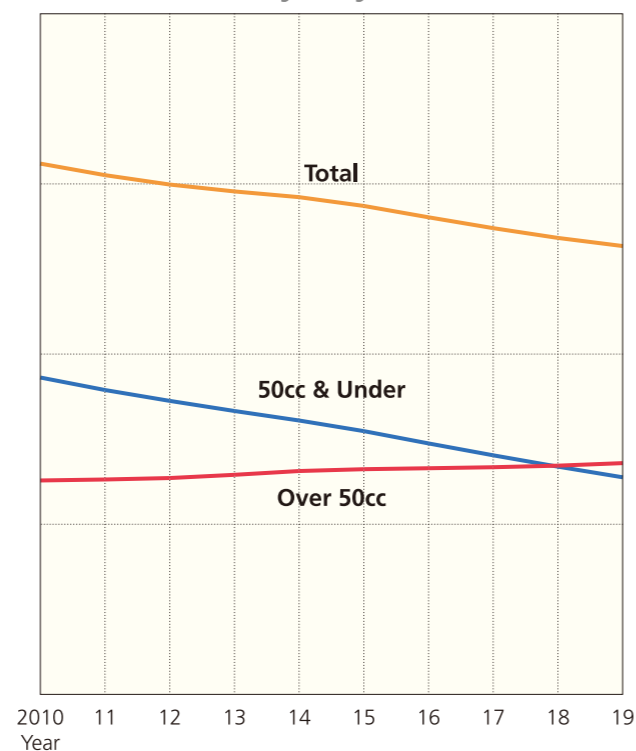
### ● MOTORCYCLES IN USE BY ENGINE CAPACITY (at March 31, 2019)

In vehicle units



### ● TRENDS IN MOTORCYCLES IN USE (at March 31 yearly)

x 1 million units



### ● MOTORCYCLES IN USE (at March 31 yearly)

Year	Motor-Driven Cycles Class 1 (50cc & Under)	Over 50cc				Total	Chg. (%)
		Motor-Driven Cycles Class 2 (51cc-125cc)	Mini-Sized Motorcycles (126cc-250cc)	Small-Sized Motorcycles (Over 250cc)	Subtotal		
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
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
2018	5,353,473	1,752,278	1,966,973	1,657,613	5,376,864	10,730,337	97.9
2019	5,103,395	1,787,133	1,968,905	1,680,416	5,436,454	10,539,849	98.2

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).

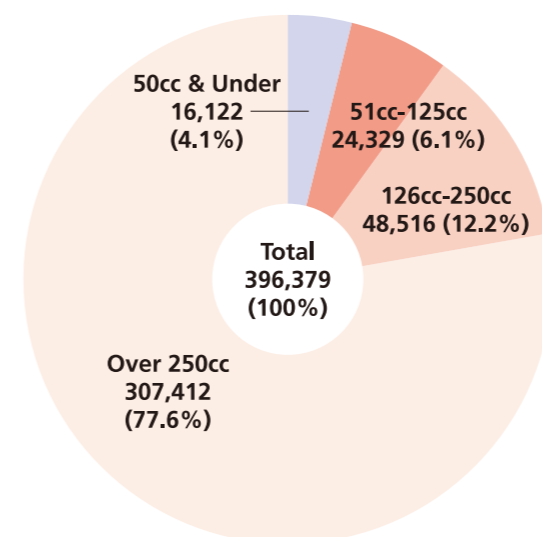
Sources: Ministry of Land, Infrastructure, Transport and Tourism; since 2006 (only for the 125cc-and-under categories), Ministry of Internal Affairs and Communications

## Motorcycle Exports Total 396,000 Units

Motorcycle exports in 2019 decreased 13.2% from the previous year to 396,000 units. By engine capacity, exports in all categories saw a decline. Class 1 motor-driven cycles and Class 2 motor-driven cycles fell 5.3% to 16,000 units and 21.5% to 24,000 units, respectively, while mini-sized motorcycles decreased 10.0% to 49,000 units and small-sized motorcycles shrank 13.4% to 307,000 units.

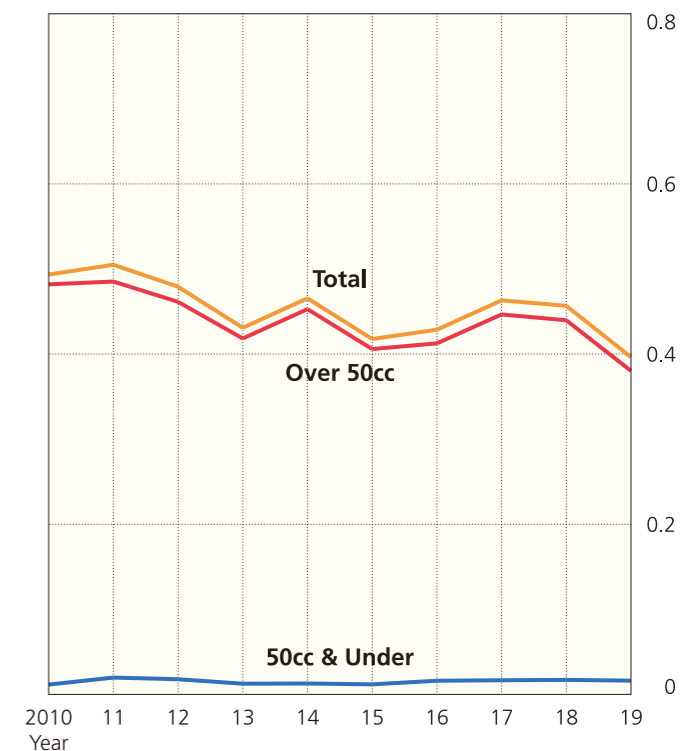
### ● MOTORCYCLE EXPORTS BY ENGINE CAPACITY IN 2019

In vehicle units



### ● TRENDS IN MOTORCYCLE EXPORTS

x 1 million units



### ● MOTORCYCLE EXPORTS

Year	Motor-Driven Cycles Class 1 (50cc & Under)	Over 50cc				Total	Chg. (%)
		Motor-Driven Cycles Class 2 (51cc-125cc)	Mini-Sized Motorcycles (126cc-250cc)	Small-Sized Motorcycles (Over 250cc)	Subtotal		
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
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
2018	17,025	30,999	53,895	354,839	439,733	456,758	98.6
2019	16,122	24,329	48,516	307,412	380,257	396,379	86.8

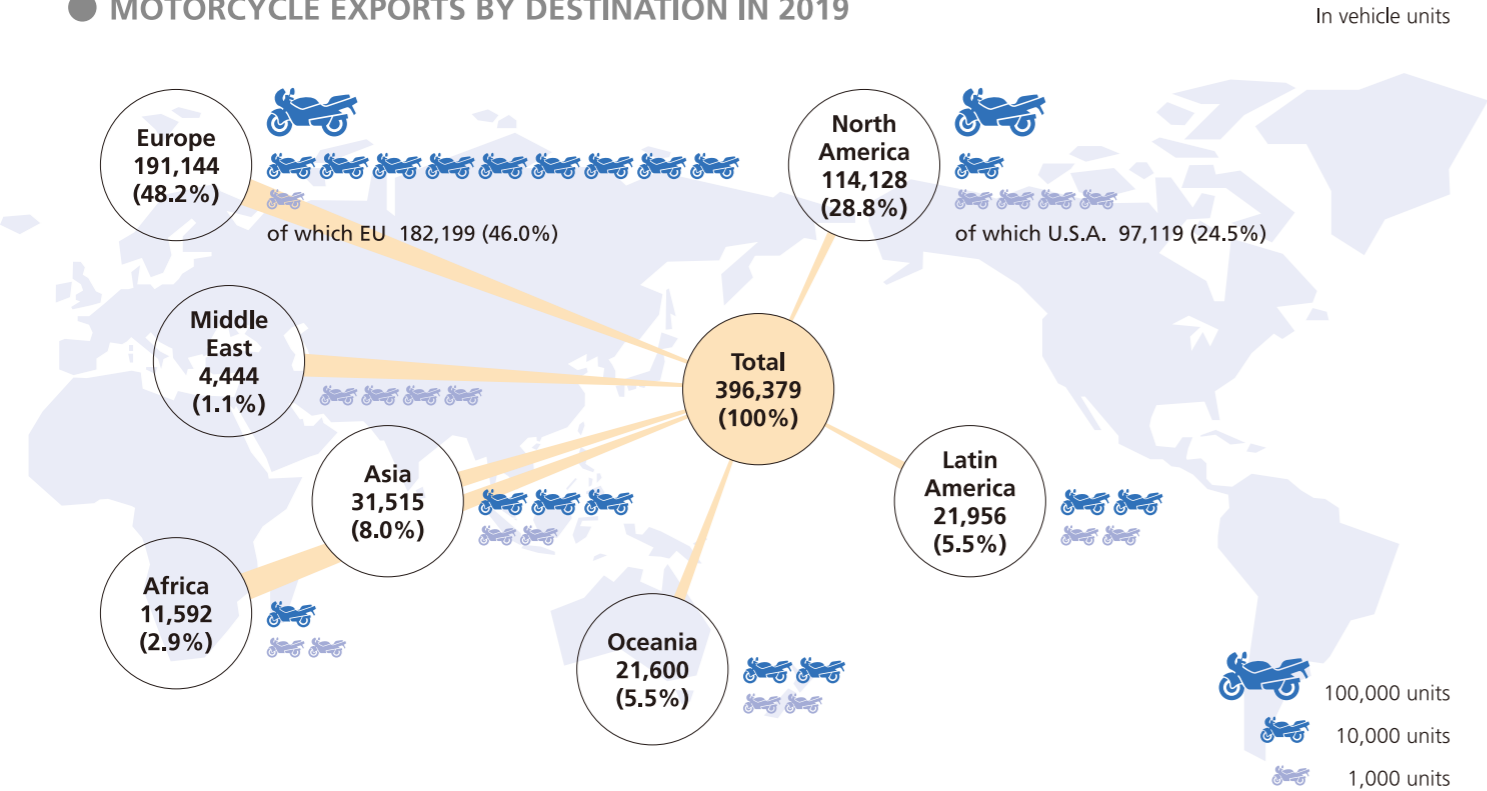
Notes: 1. Figures represent ex-factory export shipments of motorcycles manufactured in Japan. 2. Class 2 motor-driven cycles include three-wheeled motor-driven cycles. 3. KD sets have been excluded since 1979; they represent less than 60% of the cost of compositional components per vehicle and have been 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

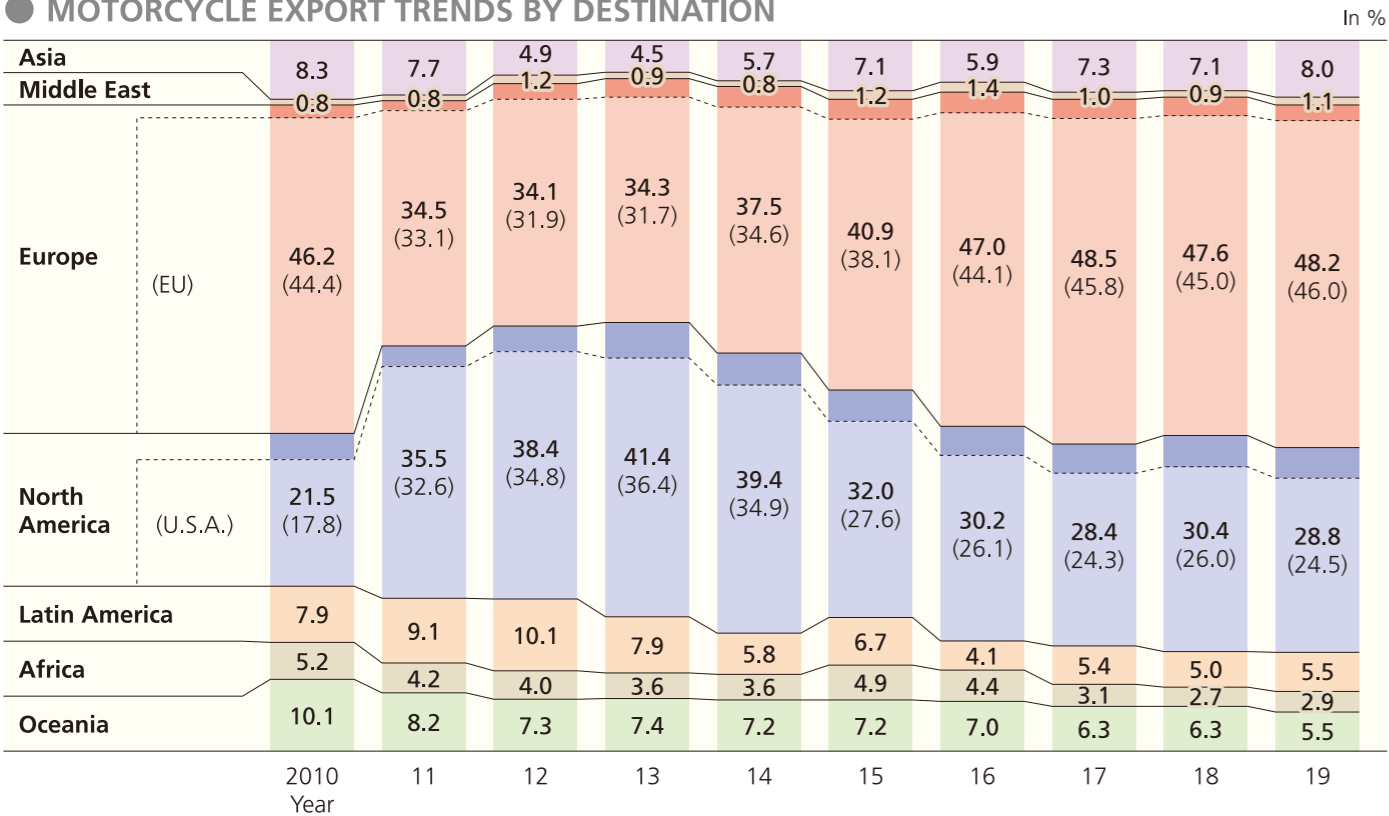
An Increase in Motorcycle Exports to the Middle East

Compared to the previous year, motorcycle exports in 2019 increased to the Middle East (4,000 units), but decreased to Europe (191,000 units), North America (114,000 units), Asia (32,000 units), Latin America (22,000 units), Oceania (22,000 units), and Africa (12,000 units).

MOTORCYCLE EXPORTS BY DESTINATION IN 2019



MOTORCYCLE EXPORT TRENDS BY DESTINATION



MOTORCYCLE EXPORTS BY DESTINATION & BY ENGINE CAPACITY IN 2019

In vehicle units

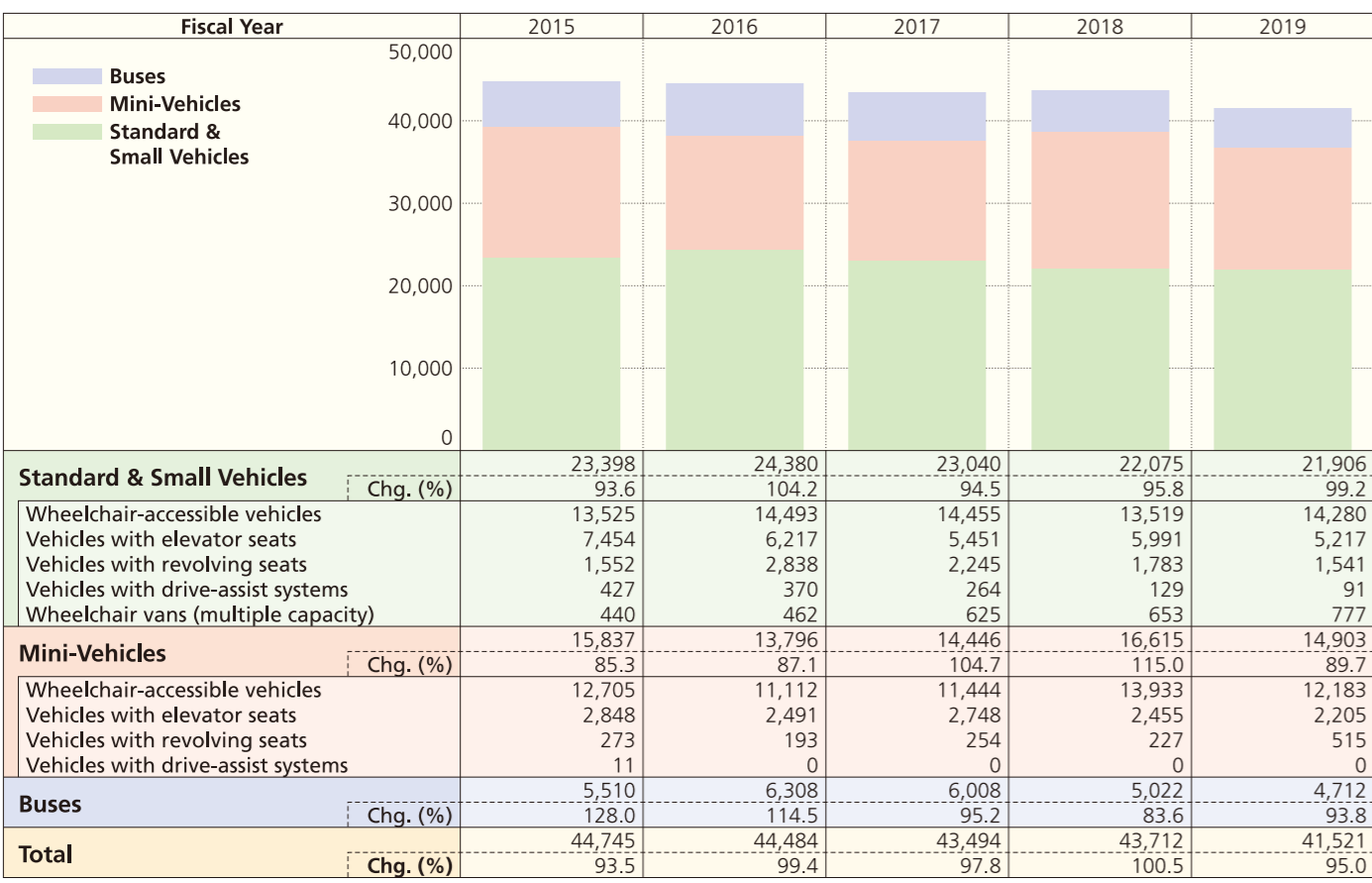
Destination		Motor-Driven Cycles Class 1 (50cc & Under)	Over 50cc			Subtotal	Total
			Motor-Driven Cycles Class 2 (51cc-125cc)	Mini-Sized Motorcycles (126cc-250cc)	Small-Sized Motorcycles (Over 250cc)		
Asia	South Korea	3	8	9	3,477	3,494	3,497
	China	0	0	1	3,322	3,323	3,323
	Taiwan	0	502	0	2,172	2,674	2,674
	Hong Kong	0	10	82	1,853	1,945	1,945
	Thailand	9	0	1,161	7,523	8,684	8,693
	Singapore	3	132	174	2,038	2,344	2,347
	Malaysia	0	0	2	3,162	3,164	3,164
	Philippines	63	91	762	3,314	4,167	4,230
	Indonesia	0	1	281	397	679	679
	Other	2	2	57	902	961	963
	Subtotal	80	746	2,529	28,160	31,435	31,515
Middle East	Saudi Arabia	0	6	1	436	443	443
	Israel	9	88	114	2,341	2,543	2,552
	United Arab Emirates	3	332	78	256	666	669
	Other	3	9	126	642	777	780
	Subtotal	15	435	319	3,675	4,429	4,444
Europe	Sweden	0	0	146	645	791	791
	Denmark	0	0	47	556	603	603
	UK	0	0	428	7,274	7,702	7,702
	Netherlands	0	444	1,178	32,796	34,418	34,418
	Belgium	0	0	30	1,131	1,161	1,161
	France	1,221	2,737	1,980	44,549	49,266	50,487
	Germany	363	822	1,126	24,066	26,014	26,377
	Portugal	0	0	2	641	643	643
	Spain	159	144	281	18,282	18,707	18,866
	Italy	111	250	1,395	30,158	31,803	31,914
	Poland	0	0	23	1,314	1,337	1,337
	Austria	0	6	73	1,822	1,901	1,901
	Hungary	0	6	68	1,508	1,582	1,582
	Greece	12	22	30	1,552	1,604	1,616
	Slovenia	54	54	91	859	1,004	1,058
	Czech Republic	0	0	10	578	588	588
	Other	6	20	139	990	1,149	1,155
	Subtotal	1,926	4,505	7,047	168,721	180,273	182,199
	Norway	0	0	42	704	746	746
	Switzerland	42	90	247	4,719	5,056	5,098
	Turkey	0	0	0	1,594	1,594	1,594
	Russia	57	112	71	993	1,176	1,233
	Other	0	0	0	274	274	274
	Subtotal	2,025	4,707	7,407	177,005	189,119	191,144
North America	Canada	1,358	1,507	3,620	10,524	15,651	17,009
	U.S.A.	9,818	7,701	20,280	59,320	87,301	97,119
	Subtotal	11,176	9,208	23,900	69,844	102,952	114,128
Latin America	Mexico	96	56	207	1,774	2,037	2,133
	Guatemala	3	6	421	95	522	525
	Panama	6	8	420	27	455	461
	Colombia	0	60	2,062	2,788	4,910	4,910
	Peru	0	16	28	124	168	168
	Chile	81	206	585	1,423	2,214	2,295
	Brazil	6	28	382	8,145	8,555	8,561
	Argentina	0	5	52	413	470	470
	Other	67	189	1,111	1,066	2,366	2,433
	Subtotal	259	574	5,268	15,855	21,697	21,956
Africa	Guinea	0	32	60	0	92	92
	Togo	0	1,100	595	0	1,695	1,695
	Mali	0	800	1,097	0	1,897	1,897
	Niger	0	900	750	0	1,650	1,650
	Dem Rep Congo	0	1,052	47	0	1,099	1,099
	Ethiopia	0	0	12	0	12	12
	Kenya	0	50	143	4	197	197
	Uganda	0	397	22	0	419	419
	South Africa	30	322	775	985	2,082	2,112
	Other	27	1,004	383	1,005	2,392	2,419
	Subtotal	57	5,657	3,884	1,994	11,535	11,592
Oceania	Australia	1,959	2,257	3,520	9,464	15,241	17,200
	New Zealand	539	707	1,599	1,353	3,659	4,198
	Other	12	38	90	62	190	202
	Subtotal	2,510	3,002	5,209	10,879	19,090	21,600
Grand Totals		16,122	24,329	48,516	307,412	380,257	396,379

Source: Japan Automobile Manufacturers Association

Assisted-Mobility Vehicle Sales Total 42,000 Units

In 2019 sales of assisted-mobility vehicles were down 5% from the previous year to total 42,000 units. 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. 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.

TRENDS IN ASSISTED-MOBILITY VEHICLE SALES



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. “Chg. (%)” means change from the previous year (with the previous year’s result indexed at 100). Source: Japan Automobile Manufacturers Association

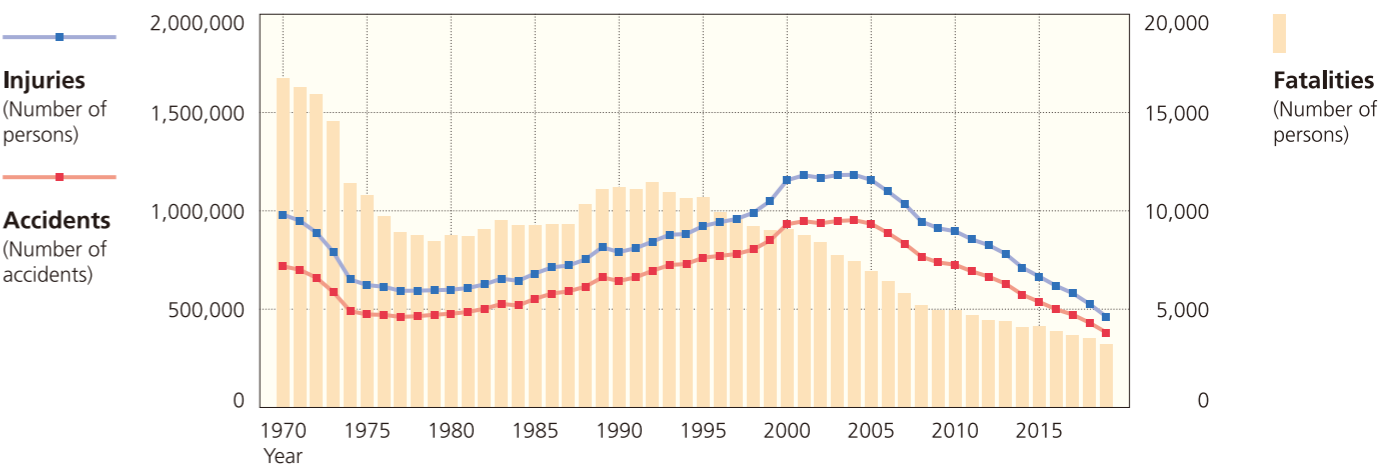
TYPES OF ASSISTED-MOBILITY VEHICLES

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 seats can be rotated, rotated and slid out, or rotated and tilted to the exterior. Helpful for easy 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.	

Promoting Greater Road Safety

Road safety involves three factors—road users, vehicles, and road infrastructure. Accordingly, those three factors are the focus of JAMA’s and its member manufacturers’ road safety activities (for the latter’s vehicle-related measures for increased active and passive safety, see page 27). JAMA’s activities promoting greater road safety target road users and are implemented through various channels. JAMA also regularly submits to Japan’s relevant authorities recommendations on road infrastructure-related measures for increased safety and convenience in road use. In 2019 road fatalities (defined here as deaths occurring within 24 hours after accident) in Japan dropped to 3,215, 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 fifteenth consecutive year, to 381,237 and 461,775, 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 2019 stood at 39.2% on regular roads and at 74.1% 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

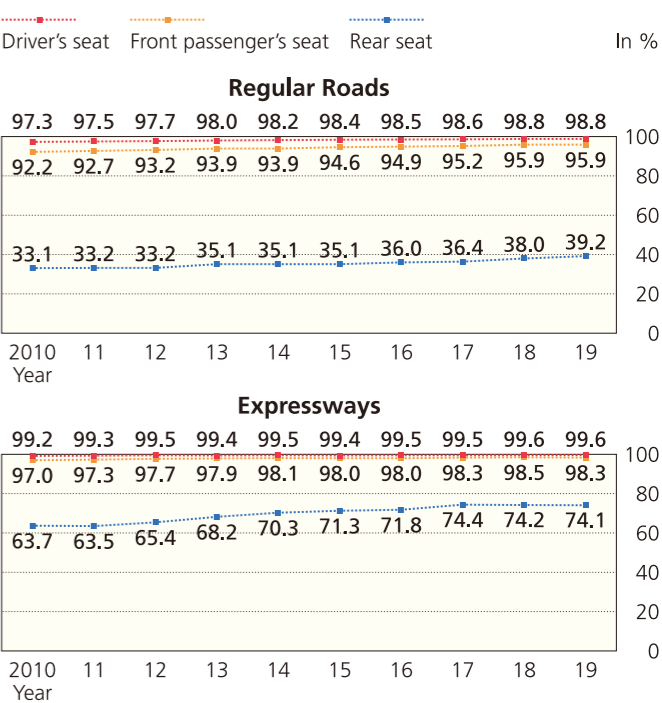


ROAD ACCIDENTS/INJURIES/FATALITIES (exact figures)

Year	Accidents	Injuries (Number of persons)	Fatalities (Number of persons)
1970	718,080	981,096	16,765
1975	472,938	622,467	10,792
1980	476,677	598,719	8,760
1985	552,788	681,346	9,261
1990	643,097	790,295	11,227
1995	761,794	922,677	10,684
2000	931,950	1,155,707	9,073
2005	934,346	1,157,113	6,937
2010	725,924	896,297	4,948
2011	692,084	854,613	4,691
2012	665,157	825,392	4,438
2013	629,033	781,492	4,388
2014	573,842	711,374	4,113
2015	536,899	666,023	4,117
2016	499,201	618,853	3,904
2017	472,165	580,850	3,694
2018	430,601	525,846	3,532
2019	381,237	461,775	3,215

Source: National Police Agency

SEATBELT USE RATES BY SEAT POSITION



Notes: 1. The 2019 survey on seatbelt use was conducted in November. 2. 2019 survey samples totalled roughly 410,000 on regular roads and 88,000 on expressways. Sources: National Police Agency; Japan Automobile Federation

Widespread Application of Advanced Safety Vehicle Technologies

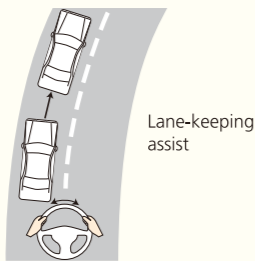
EXPANDING AVAILABILITY OF ASV TECHNOLOGIES IN THE MARKET

As a result of research conducted on the Advanced Safety Vehicle (ASV) concept, a wide range of vehicle safety features, including lane-keeping assist systems, full-range adaptive cruise control systems and collision-mitigation braking systems, have been developed in the area of safe-driving assistance. Most of these advanced technologies have already been introduced to the market (see page 27 for details on the status of their onboard installation).

PRACTICAL APPLICATION OF ASV TECHNOLOGIES

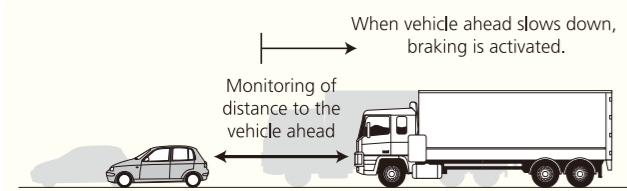
1. Lane-Keeping Assist

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.



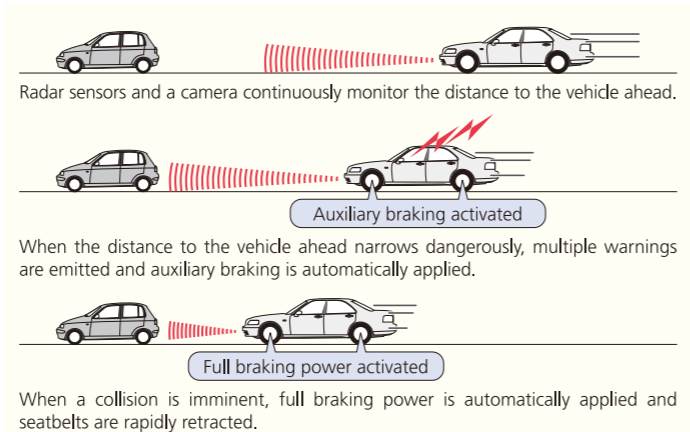
2. Full-Range Adaptive Cruise Control

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] (example of operation)

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.



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, Financial Services Agency and 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 collision-mitigation braking systems, to help drivers of all ages avoid road accident occurrence and to mitigate damage/injury when accidents do occur.

THE "SAFETY SUPPORT CAR" Ver 1.0 CONCEPT

Safety Support Car (or "Sapocar")	Safety Support Car S (or "Sapocar S")	"Sapocar S" Classification The "Sapocar S" concept has three sub-classifications, based on the safety features installed.	
 Safety Support Car  Passenger cars equipped with collision-mitigation braking systems; suitable for all drivers	 Safety Support Car S  Passenger cars equipped with collision-mitigation braking systems and accelerator suppression for pedal misapplication; suitable especially for elderly drivers	 Type: "Wide" Collision-mitigation braking system (pedestrian collision avoidance) Accelerator suppression for pedal misapplication (1) Lane departure warning (2) Advanced headlamp control (3)	
		 Type: "Basic+" Collision-mitigation braking system (vehicle collision avoidance) Accelerator suppression for pedal misapplication (1)	
		 Type: "Basic" Collision-mitigation braking system (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, 84.6% of the totality of passenger cars produced in 2018 for the domestic market were equipped with forward collision-mitigation braking systems (including those for low-speed vehicle operation) and 77.1% 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 2018 for home market)

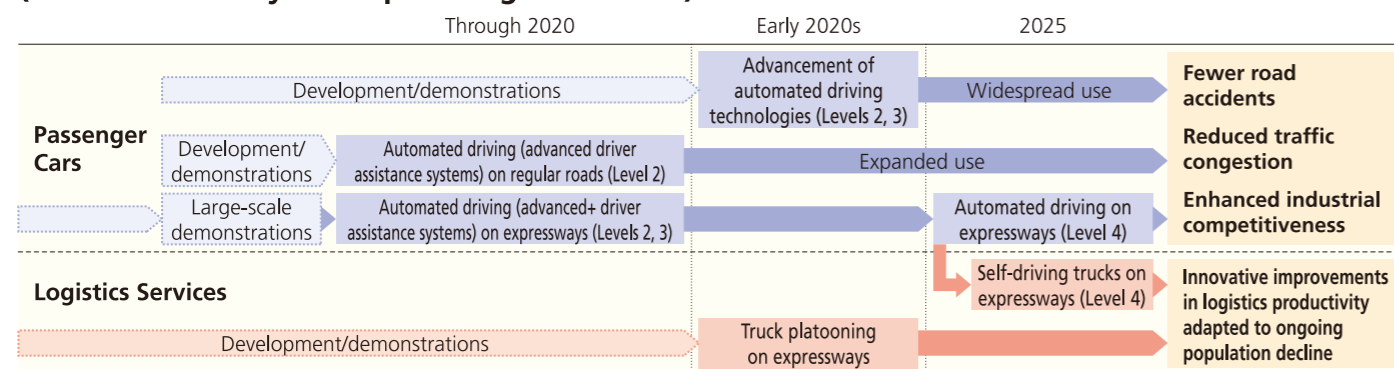
	Safety Feature	Installation Status				
		In no. of models (1)		In % (2)	In vehicle units	In % (2)
Active Safety	Brake assist	176	(161)	98.9	4,007,554	99.7
	Unfastened seatbelt warning (front passenger's seat)	133	(119)	74.7	3,327,030	82.7
	Power-window jamming prevention (with auto-up function)	177	(161)	99.4	4,011,546	99.8
	Power-window jamming prevention (without auto-up function)	39	(37)	22.5	738,938	18.4
	High-intensity discharge headlamps	167	(70)	93.8	2,721,126	67.7
	Adaptive front-lighting system (AFS)	32	(22)	18.0	433,572	10.8
	Backing-up monitoring (rear obstacle detection)	136	(32)	76.4	2,366,502	58.9
	Vehicle perimeter monitoring	72	(7)	40.4	967,322	24.1
	Vehicle perimeter obstacle warning	83	(26)	46.6	2,110,239	52.5
	Blind-corner monitoring	58	(4)	32.6	602,917	15.0
	Night vision monitoring	1	(0)	0.6	3	0.0
	Curve detection	26	(9)	14.6	284,504	7.1
	Tire pressure monitoring	20	(16)	11.2	83,565	2.1
	Driver inattention warning	85	(26)	47.8	1,456,713	36.2
	Inter-vehicle distance warning	137	(42)	77.0	3,184,022	79.2
	Lane departure warning	137	(50)	77.0	3,120,400	77.6
	Rear collision warning-equipped headrest control	3	(0)	1.7	28	0.0
	Forward collision-mitigation braking system	139	(52)	78.1	3,196,129	79.5
	Forward collision-mitigation braking system (for low-speed vehicle operation)	23	(3)	12.9	203,754	5.1
	Accelerator suppression for pedal misapplication	128	(26)	71.9	3,101,855	77.1
	Adaptive cruise control	68	(25)	38.2	1,197,829	29.8
	Adaptive cruise control with low-speed following mode	32	(17)	18.0	501,386	12.5
	Full-range adaptive cruise control	52	(24)	29.2	771,752	19.2
	Lane-keeping assist	59	(20)	33.1	1,247,717	31.0
	Backing-up monitoring (parking assistance)	18	(0)	10.1	192,593	4.8
	Navigator-based gearshift control	14	(2)	7.9	87,002	2.2
	Pre-crash seatbelts	8	(3)	4.5	20,662	0.5
	Electronic stability control	174	(154)	97.8	3,978,205	98.9
	Traction control with anti-lock braking system	158	(141)	88.8	3,409,657	84.8
	Rearward-approaching-vehicle warning	49	(16)	27.5	542,376	13.5
	Emergency braking warning	143	(123)	80.3	3,512,863	87.4
	Vehicle proximity warning (for HVs/EVs) (3)	66	(47)	66.7	1,172,357	67.4
	Automatic high-to-low-beam headlamp control	96	(19)	53.9	2,041,138	50.8
	Glare-free high beam headlamp control	26	(3)	14.6	250,169	6.2
	Backing-up monitoring (moving-object warning)	48	(14)	27.0	619,856	15.4
	Backing-up collision-mitigation braking system	9	(2)	5.1	82,788	2.1
	Vehicle perimeter-based collision-mitigation braking system (for low-speed operation)	44	(2)	24.7	1,192,071	29.6
	Rear collision-mitigation braking system	66	(14)	37.1	1,603,558	39.9
	Lane departure prevention	68	(26)	38.2	1,341,573	33.4
Passive Safety	Side airbags	150	(92)	84.3	2,124,747	52.8
	Curtain airbags	146	(89)	82.0	1,713,318	42.6
	Active head restraints	132	(134)	74.2	3,236,848	80.5
	i-Size child car seats	81	(79)	46.0	1,579,553	39.3
	J-EDR (Japanese regulation-compliant event data recorders)	94	(89)	52.8	2,135,996	53.1
	Automatic collision notification (ACN)	22	(18)	13.0	223,658	5.6
	Advanced automatic collision notification (AACN)	17	(36)	9.6	566,360	14.1
	Total	178		4,020,666		

(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 2018 a total of 99 hybrid/electric car models (1,738,318 vehicle units) were produced. Notes: 1. Passenger cars here include minicars. 2. Criteria for inclusion in the calculations whose results are shown here were revised in 2015.

## The Transition to Automated Driving

Aiming for the real-world implementation of automated driving, the Japanese government released, in April 2018, an outline of the system-building measures needed to create the legal frameworks necessary for the practical application of automated driving technologies (Level 3) by the year 2020. A subsequent review of road traffic-related frameworks conducted on the basis of that outline by the ministries and agencies concerned led to the enactment in early 2020 of a revised Road Traffic Act and a revised Road Vehicles Act. The government's Public-Private ITS Initiative/Roadmaps policy initiative, which represents Japan's strategy on ITS and automated driving systems development, formulates a plan to marketize automated driving systems (Level 4) on expressways and expand their use in freight transport by 2025. JAMA is actively participating in the initiatives being undertaken for the practical use of automated driving technologies.

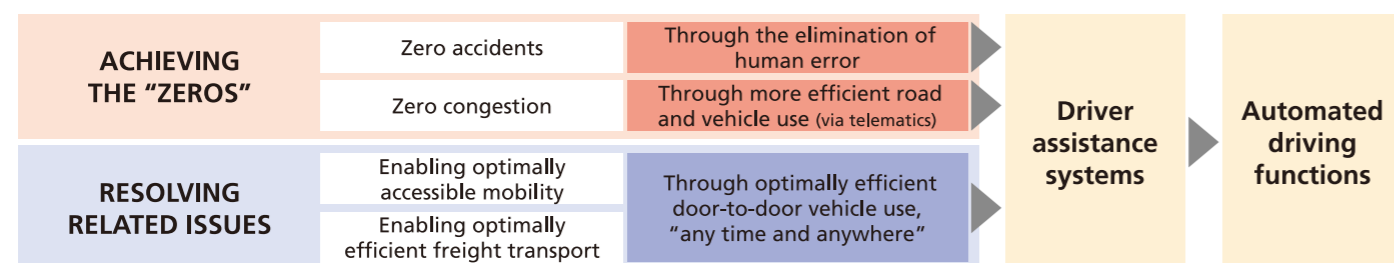
### TIMELINE FOR THE PROMOTION OF AUTOMATED DRIVING (as formulated by the Japanese government)



Source: The Public-Private ITS Initiative/Roadmaps (Japanese government)

### JAMA'S VISION OF AUTOMATED DRIVING

In November 2015, JAMA released a roadmap for achieving optimally safe, accessible, and efficient mobility for all road users in Japan through the use of automated driving technologies. The roadmap envisions the wider introduction of automated driving functions 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.



### PROMOTING EXPANDED USE OF AUTOMATED DRIVING

To promote the goal of "Achieving optimally safe, accessible, and efficient mobility," JAMA will work to enhance social acceptance for automated driving, including through public automated driving demonstrations.



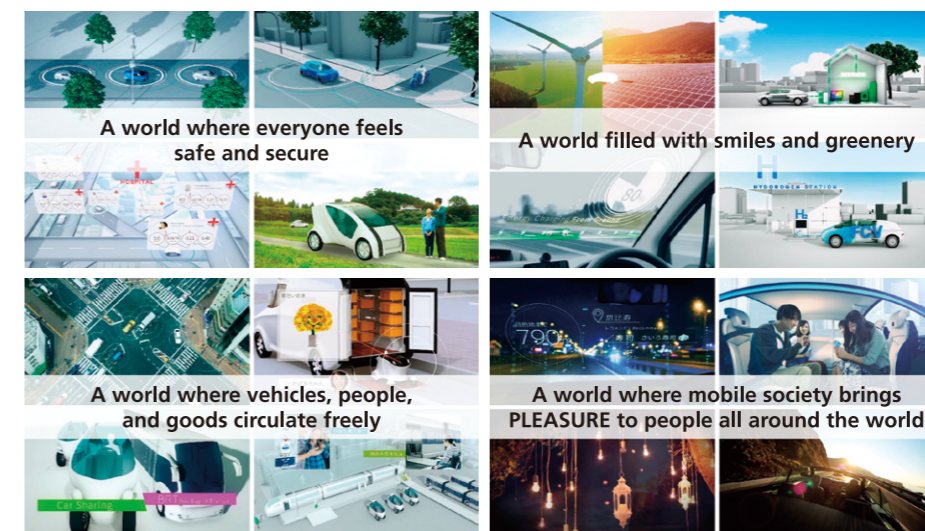
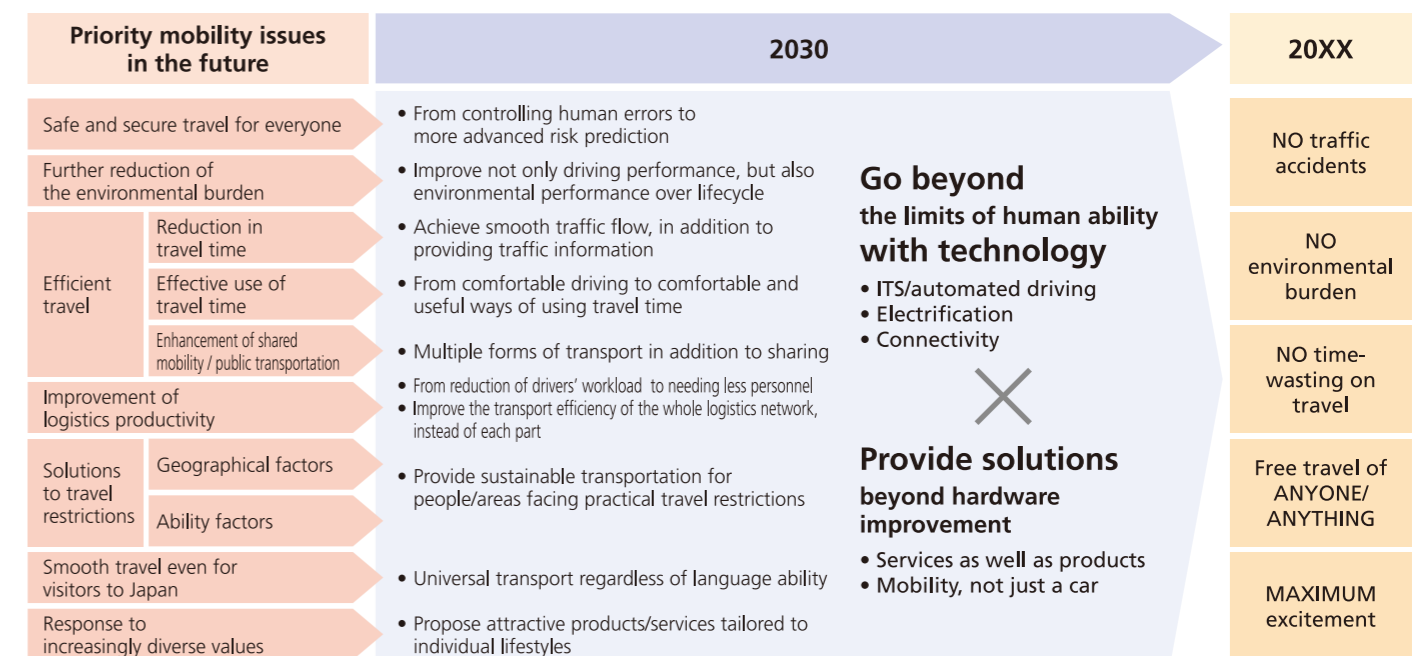
## The "Mid- and Long-Term Mobility Vision" Formulated by JAMA

The Tokyo 2020 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 March 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 2020 Olympics and Paralympics—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>

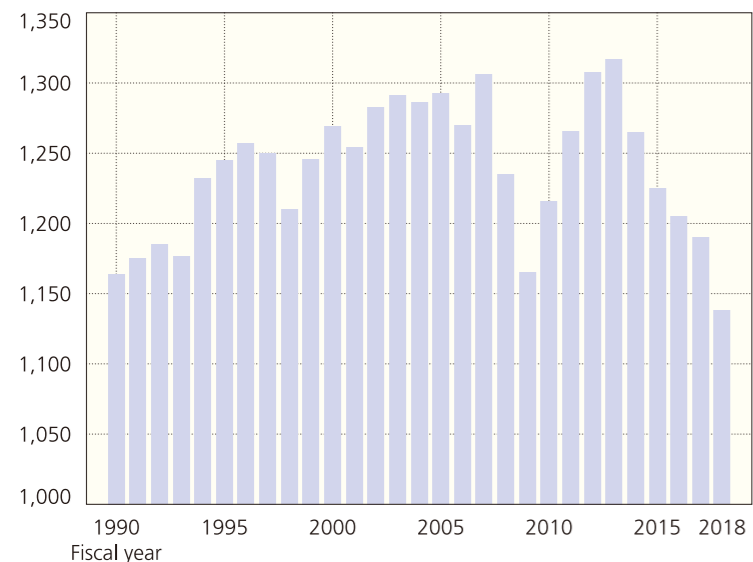
## Climate Change and CO<sub>2</sub> Emissions Reduction: The Response of the Transport Sector

In 2018 Japan's CO<sub>2</sub> emissions totalled 1.14 billion tons (actual figure), of which the transportation sector accounted for nearly 19%. Since peaking in 2001 following a decade of growth, CO<sub>2</sub> 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. The automobile industry will continue to vigorously promote CO<sub>2</sub> emissions reduction in road transport by further improving vehicle fuel efficiency and expanding the market supply of next-generation vehicles.

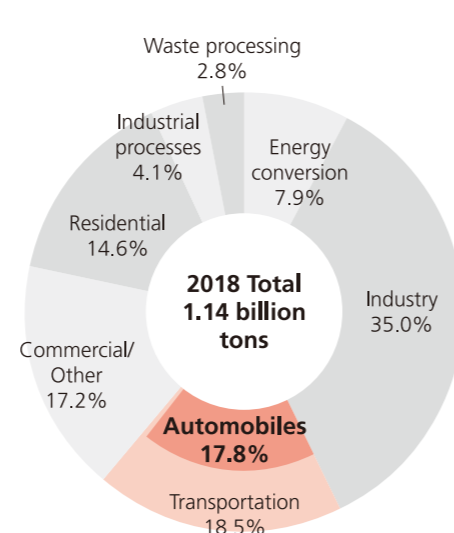
### CO<sub>2</sub> EMISSIONS IN JAPAN

The transportation sector accounts for nearly 19% of Japan's total CO<sub>2</sub> emissions, which in 2018 amounted to 1.14 billion tons (actual figure).

Japan's CO<sub>2</sub> Emission Volumes, 1990-2018 x 1 million tons



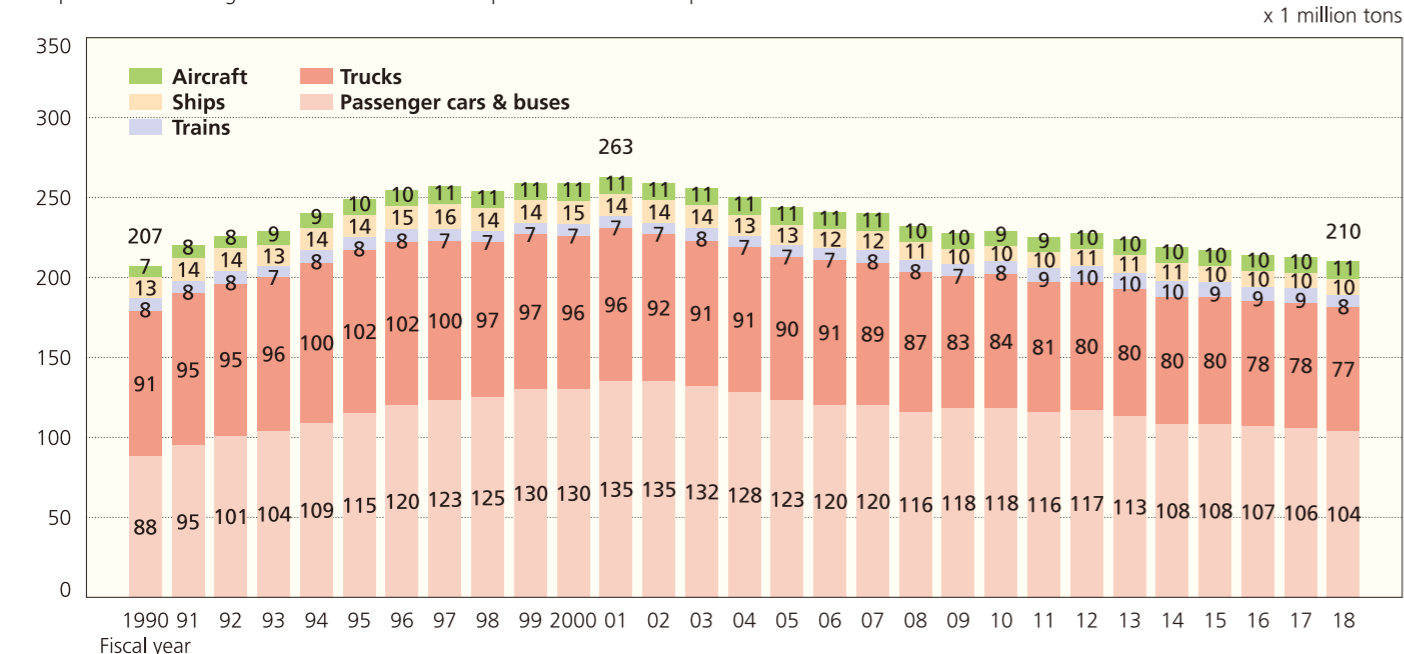
CO<sub>2</sub> Emission Shares by Sector in 2018



Source: Ministry of the Environment

### TRENDS IN CO<sub>2</sub> EMISSION VOLUMES IN JAPAN'S TRANSPORT SECTOR, BY MODE

Motor vehicle-emitted CO<sub>2</sub> accounts for about 90% of the totality of CO<sub>2</sub> emitted by Japan's transport sector. CO<sub>2</sub> emissions from road transportation in Japan have seen a significant decrease since transport-sector emissions peaked in 2001.

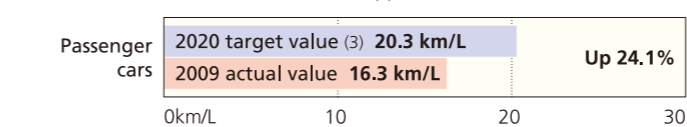


Source: Ministry of the Environment

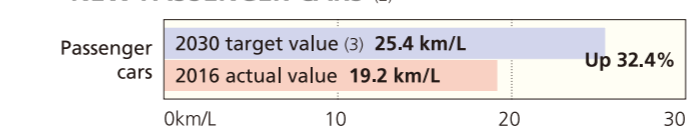
## CO<sub>2</sub> Emissions Reduction: Improving Vehicle Fuel Efficiency

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, first, with stringent 2015 average fuel efficiency targets for small trucks and buses and heavy-duty vehicles as well as with a 2020 target for passenger cars and, subsequently, with an even stricter 2022 target for small trucks, 2025 targets for heavy-duty vehicles, and a 2030 target for passenger cars, JAMA member manufacturers have been making continuous efforts to increase the fuel efficiency of conventional vehicles and expand the supply of alternative-energy vehicles. Calculation of the average fuel efficiency target of 25.4 km/L (a 32.4% increase over the actual value in 2016) established for 2030 for new passenger cars took into account, for the first time, the fuel efficiency performances of electric vehicles and plug-in electric vehicles.

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

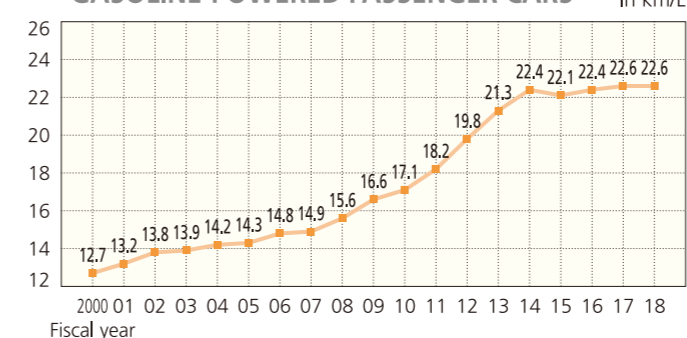


### 2030 AVERAGE FUEL EFFICIENCY TARGET FOR NEW PASSENGER CARS (2)



(1) Fuel efficiency is JC08 test cycle-based (see page 37). (2) Fuel efficiency is WLTC-based (see page 37). (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

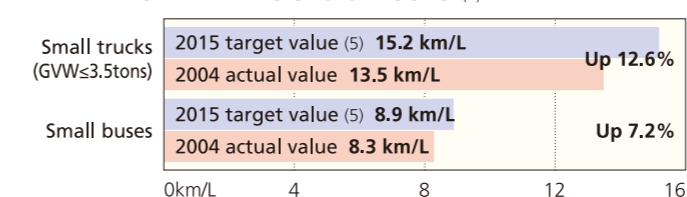
### AVERAGE FUEL EFFICIENCY OF DOMESTIC NEW GASOLINE-POWERED PASSENGER CARS In km/L



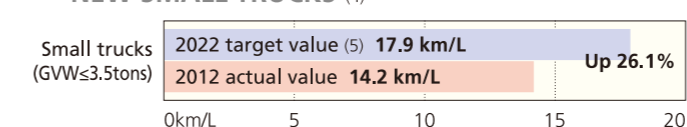
Note: Figures here are JC08 test cycle-based (see page 37).

Source: Japan Automobile Manufacturers Association

### 2015 AVERAGE FUEL EFFICIENCY TARGETS FOR NEW SMALL TRUCKS & BUSES (4)

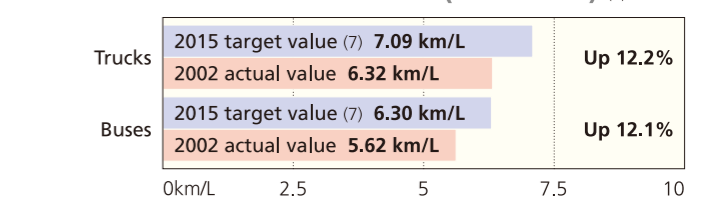


### 2022 AVERAGE FUEL EFFICIENCY TARGET FOR NEW SMALL TRUCKS (4)

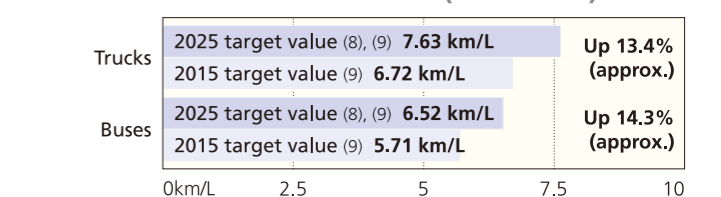


(4) Fuel efficiency is JC08 test cycle-based (see page 37). (5) Targets were established assuming the same shipment volume ratios by vehicle weight category for target years as those recorded in the years showing the actual value of fuel efficiency performance. Sources: Ministry of Economy, Trade and Industry; Ministry of Land, Infrastructure, Transport and Tourism

### 2015 AVERAGE FUEL EFFICIENCY TARGETS FOR NEW HEAVY-DUTY VEHICLES (GVW>3.5t) (6)

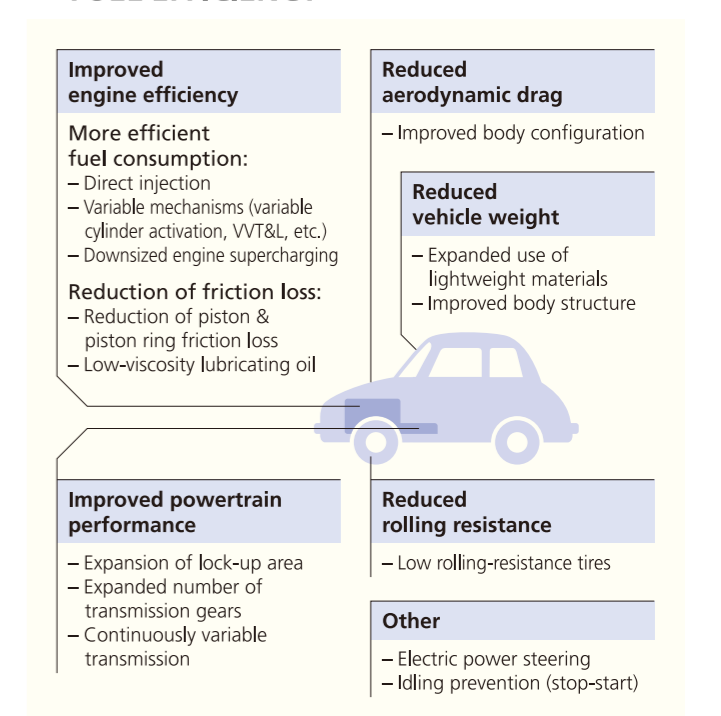


### 2025 AVERAGE FUEL EFFICIENCY TARGETS FOR NEW HEAVY-DUTY VEHICLES (GVW>3.5t)



(6) Fuel efficiency is JE05 test cycle-based. (7) 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. (8) While the 2015 target values for new heavy-duty vehicles are JE05 test cycle-based, the 2025 target values were established on the basis of a new measuring method. (9) Targets were established assuming the same shipment volume ratios by vehicle weight category for 2025 as those recorded in 2014. Sources: Ministry of Economy, Trade and Industry; Ministry of Land, Infrastructure, Transport and Tourism

### VEHICLE TECHNOLOGIES FOR INCREASED FUEL EFFICIENCY



## In-Use Status of Next-Generation Vehicles

Since 2009, when the government's tax incentive/subsidy programs for the purchase of eco-friendly vehicles were first introduced, new registrations of (so-called in Japan) next-generation vehicles—including hybrid, plug-in hybrid, electric, fuel cell, clean diesel, and other new-energy vehicles—have been steadily increasing. As a result of each automaker's efforts to develop a range of such models, the share of next-generation vehicles in new passenger car registrations in 2019 exceeded 39%. 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, 2008-2019

In vehicle units

Year	Hybrid vehicles	Plug-in hybrid vehicles	Electric vehicles	Fuel cell vehicles	Clean diesel vehicles	Total
2008	108,518	0	0	0	0	108,518
2009	347,999	0	1,078	0	4,364	353,441
2010	481,221	0	2,442	0	8,927	492,590
2011	451,308	15	12,607	0	8,797	472,727
2012	887,863	10,968	13,469	0	40,201	952,501
2013	921,045	14,122	14,756	0	75,430	1,025,353
2014	1,058,402	16,178	16,110	7	78,822	1,169,519
2015	1,074,926	14,188	10,467	411	153,768	1,253,760
2016	1,275,560	9,390	15,299	1,054	143,468	1,444,771
2017	1,385,343	36,004	18,092	849	156,162	1,596,450
2018	1,431,856	23,230	26,533	612	176,725	1,658,956
2019	1,472,281	17,609	21,281	685	175,145	1,687,001

Source: Japan Automobile Manufacturers Association

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

In %

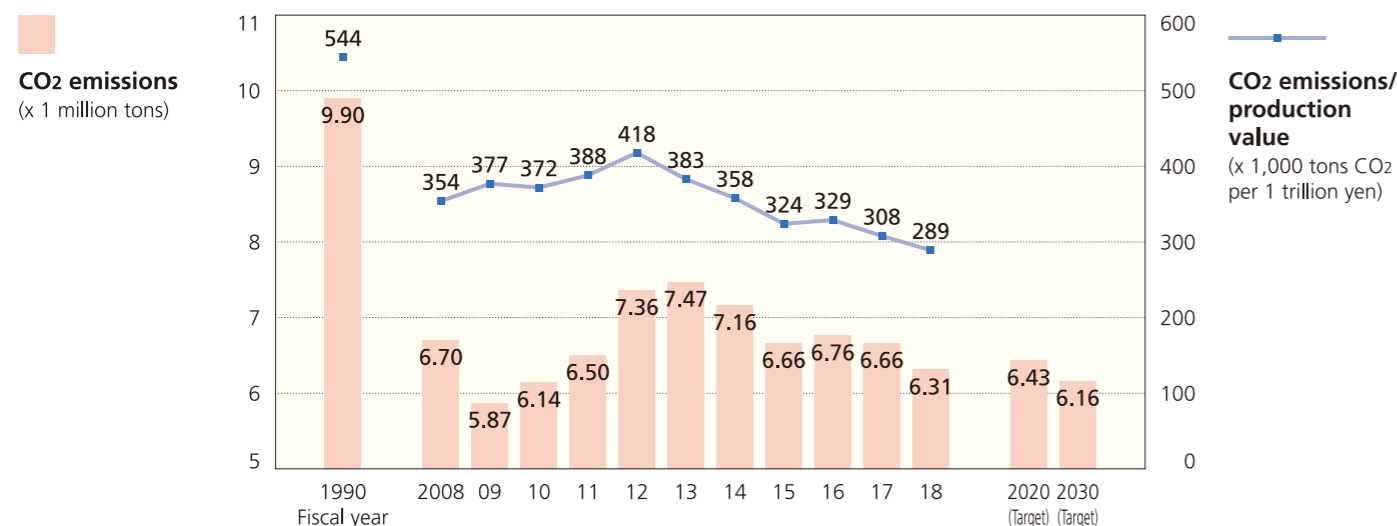


Source: Japan Automobile Manufacturers Association

## 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 CO<sub>2</sub> emissions at their production plants. Having more recently expanded their voluntary CO<sub>2</sub> reduction activities to also include administrative and research facilities, their combined facility-emitted CO<sub>2</sub> in 2018 totalled 6.31 million tons (preliminary figure), down 350,000 tons from the previous year and surpassing the 2020 target established in 2016 of 6.43 million tons (a 35% reduction from the 1990 level). JAMA and JABIA members aim to reduce their combined facility-emitted CO<sub>2</sub> to 6.16 million tons (a 38% reduction from 1990) by 2030.

### ● FACILITY-GENERATED CO<sub>2</sub> EMISSION VOLUMES, 1990-2018



Source: Japan Automobile Manufacturers Association

## Voluntary Initiatives to Eliminate the Use of Four Heavy Metals in Motor Vehicles

JAMA member manufacturers have, on a voluntary basis, eliminated the use of four heavy metals—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. Restrictions on the use of these substances in motorcycles have been established separately.

### ● RESTRICTIONS ON THE USE OF FOUR HEAVY METALS IN NEW VEHICLES & COMPLIANCE STATUS

Substance	Restrictions	Compliance Status
<b>Lead</b>	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.
<b>Mercury</b>	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. Components listed here in the left column are now mercury-free in all models.
<b>Hexavalent chromium</b>	Banned as of January 2008.	All models are now in compliance.
<b>Cadmium</b>	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 in January 2002 by Japan's Ministry of Health, Labor and Welfare for indoor concentration levels of 13 volatile organic compounds (VOCs; see table below). To measure VOC concentration levels in vehicle cabin air, JAMA-developed in-cabin test procedures covering passenger cars as well as trucks and buses were introduced in 2005. However, JAMA's test procedure for passenger cars was replaced by ISO 12219-1 when the latter was established, in July 2012, as the global standard for testing in-cabin VOCs in passenger cars. On the other hand, JASO test methods based on the JAMA procedure for measuring in-cabin VOC concentration levels in trucks and buses (which are not covered by the ISO standard) remain in application. Meanwhile, automakers are continuously working to achieve further reductions in in-cabin VOC concentration levels. This voluntary initiative applies only to vehicles that are manufactured and sold in Japan.

### ● TARGET VALUES FOR INDOOR CONCENTRATION LEVELS OF 13 SUBSTANCES (VOCs) (established in January 2002)

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

## 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). 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 2018 the volume of auto plant-generated waste destined for landfill disposal totalled 200 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)		End-of-Life Vehicle Recycling Law
	Product Design	Waste Management	
“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	<b>ELV Recycling</b>  Basic premise: - Environmentally responsible vehicle design on the part of automobile manufacturers  - Recovery and recycling of: 1) Fluorocarbons 2) Airbags 3) ASR  Note: Motorcycles are not covered by the ELV Recycling Law.
“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 ↓ 2018: 200 tons JAMA target: 1,000 tons by fiscal 2020  *For landfill disposal, including scrap metals, casting sand residue, and other waste	

(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

Fiscal Year		2018 (Actual)	2019 (Preliminary)
No. of ELVs recovered		3,378,995	3,362,852
Appropriate recovery of three designated items	Fluorocarbons	2,966,628	2,935,343
	Airbags (1)	2,764,427	2,832,656
	ASR (2)	3,191,719	3,267,706

(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.

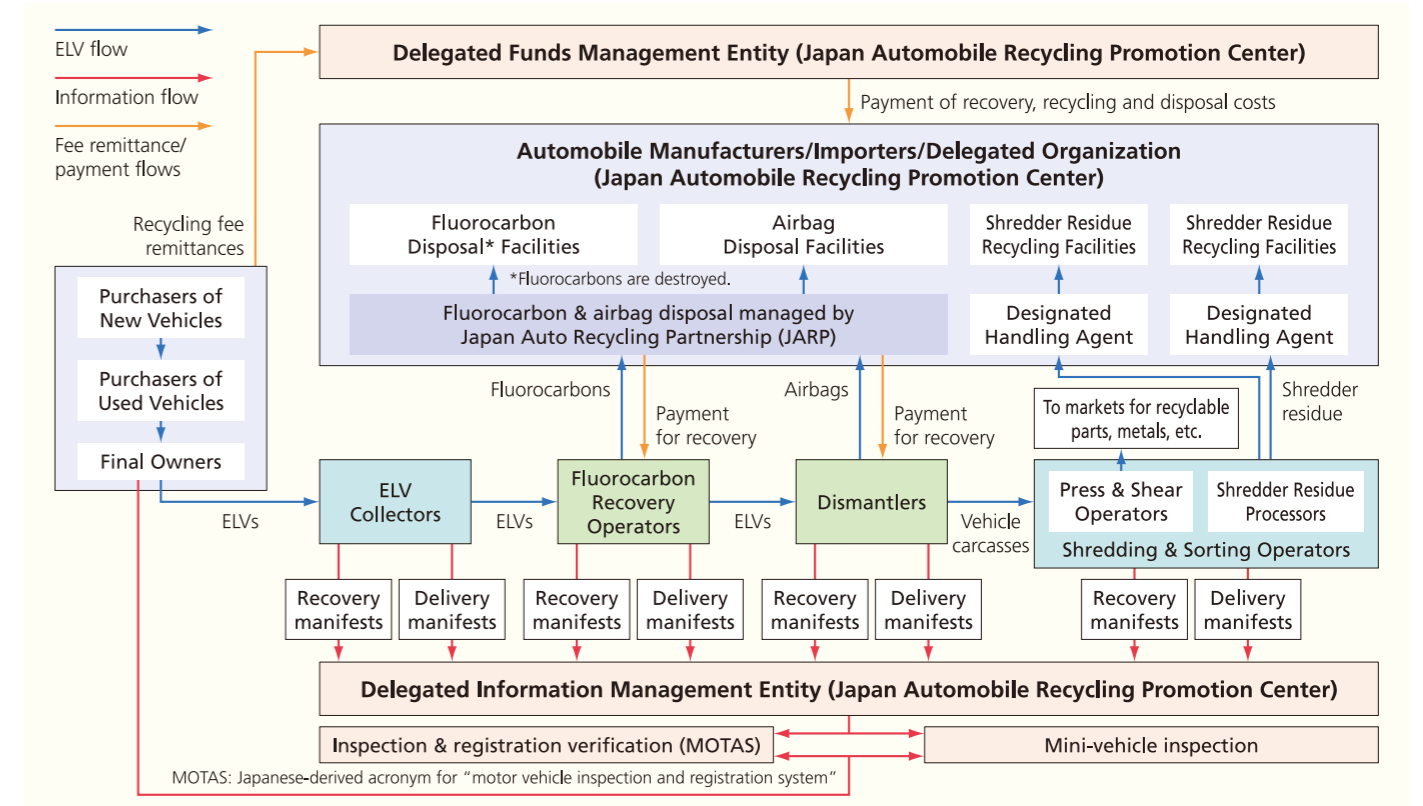
Sources: Japan Automobile Recycling Promotion Center; Japan Auto Recycling Partnership; Toyotsu Recycle Corporation; “ART” group of companies

### RECYCLING RATES: TARGETED & ACHIEVED

Three Designated Items	Target	Achieved
Fluorocarbons	Destruction	2.97 million vehicle units (2018)
Airbags	85%	94% (2018)
ASR	2005: 30% 2010: 50% 2015: 70%	97.1-98.7% (2018)

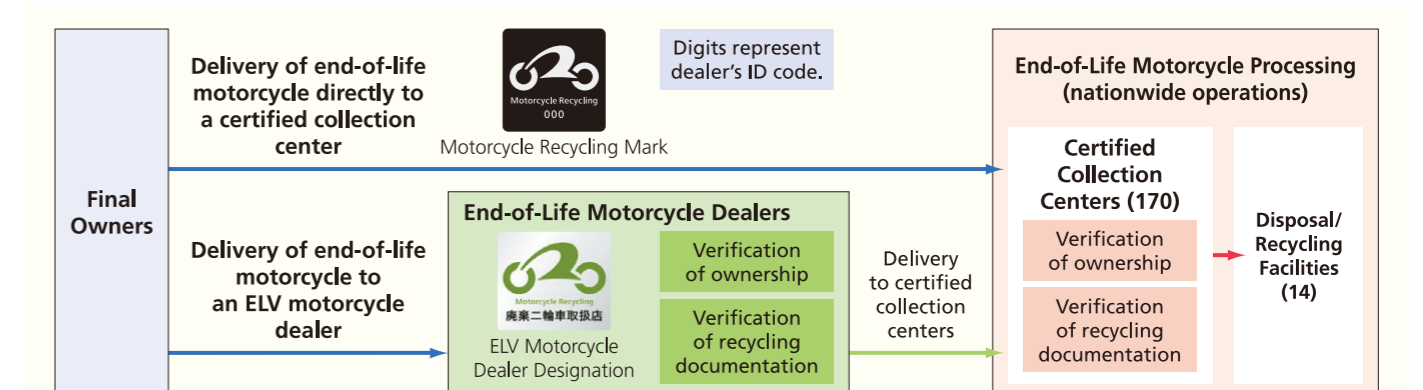
Sources: Government-affiliated entities

### 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.

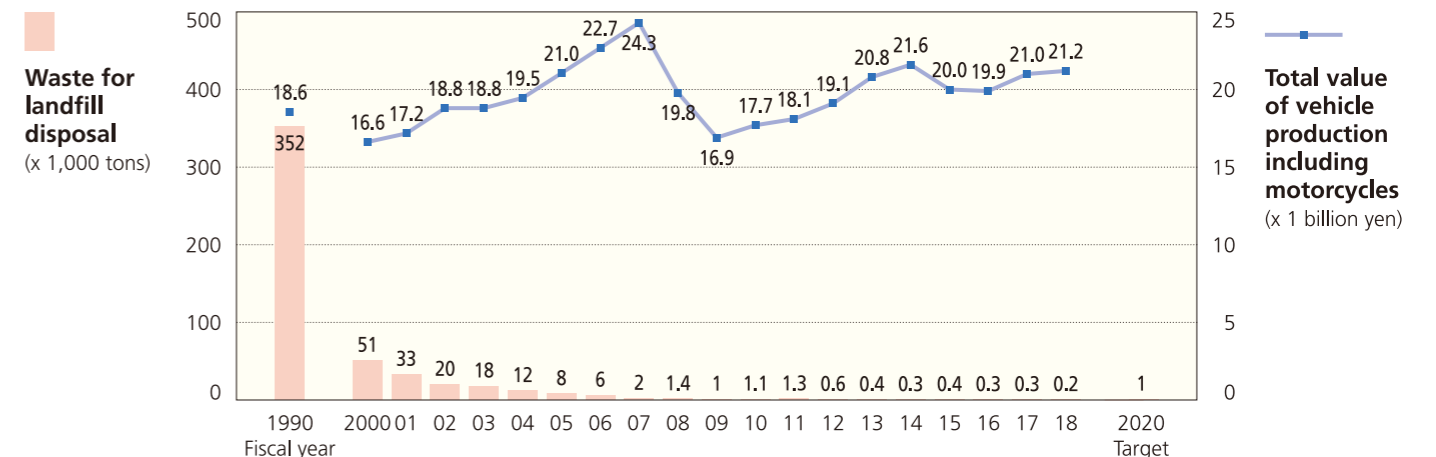
### THE MOTORCYCLE RECYCLING FLOW



Notes: 1. The only cost to final owners (where applicable) is for the delivery by ELV dealers of end-of-life motorcycles to certified collection centers. 2. The disposal of municipally-owned end-of-life motorcycles requires advance approval by the Japan Automobile Recycling Promotion Center.

Source: Japan Automobile Recycling Promotion Center

### REDUCTIONS IN PRODUCTION PLANT-GENERATED WASTE



Source: Japan Automobile Manufacturers Association

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, NOx 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 “WLTC” to measure emissions from new gasoline-powered passenger cars and light commercial vehicles, following its adoption in 2016 of the UN “WHTC” for measuring diesel exhaust emissions from new heavy-duty vehicles (see corresponding notes below).

MOTOR VEHICLE EMISSIONS REGULATIONS IN JAPAN

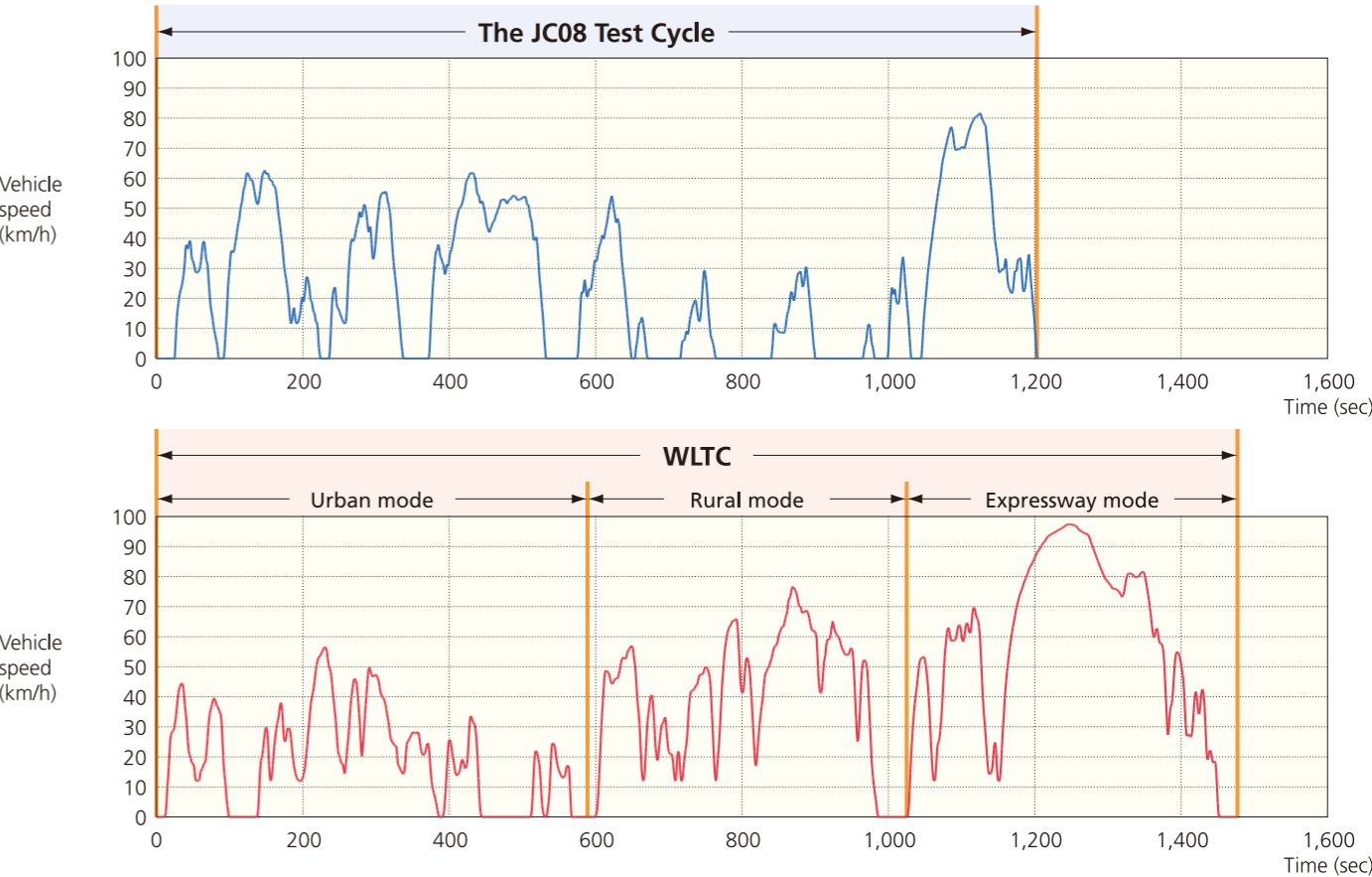
Vehicle Type			Current Regulations			
			Test cycle	Year enforced	Emission	Regulatory value (Average)
Gasoline and LPG Vehicles	Passenger cars		WLTC (g/km) (1)	2018	CO	1.15
					NMHC	0.10
					NOx	0.05
					PM (2)	0.005
	Trucks and buses	Mini	WLTC (g/km) (1)	2019	CO	4.02
					NMHC	0.10
					NOx	0.05
					PM (2)	0.005
		Light-duty (GVW≤1.7t)	WLTC (g/km) (1)	2018	CO	1.15
					NMHC	0.10
					NOx	0.05
					PM (2)	0.005
Medium-duty (1.7t<GVW≤3.5t)		WLTC (g/km) (1)	2019	CO	2.55	
				NMHC	0.15	
				NOx	0.07	
				PM (2)	0.007	
Heavy-duty (GVW>3.5t)	JE05 (g/kWh)	2009	CO	16.0		
			NMHC	0.23		
			NOx	0.7		
			PM (2)	0.01		
Diesel Vehicles	Passenger cars (3)		WLTC (g/km) (1)	2018	CO	0.63
					NMHC	0.024
					NOx	0.15
					PM	0.005
	Trucks and buses	Light-duty (GVW≤1.7t)	WLTC (g/km) (1)	2018	CO	0.63
					NMHC	0.024
					NOx	0.15
					PM	0.005
		Medium-duty (1.7t<GVW≤3.5t)	WLTC (g/km) (1)	2019	CO	0.63
					NMHC	0.024
					NOx	0.24
					PM	0.007
Heavy-duty (GVW>3.5t)		WHTC (g/kWh) (4)	2016	CO	2.22	
				NMHC	0.17	
				NOx (5)	0.4	
				PM	0.01	
Motorcycles	Class I motorcycles* 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.		WMTC (g/km) (6)	2016 (7)	CO	1.14
					THC	0.30
					NOx	0.07
	Class II motorcycles* 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.		WMTC (g/km) (6)	2016 (7)	CO	1.14
					THC	0.20
					NOx	0.07
	Class III motorcycles* With a maximum speed of ≥130km/h. *Equivalent to mini-sized and small-sized motorcycles with a maximum speed of ≥130km/h.		WMTC (g/km) (6)	2016 (7)	CO	1.14
					THC	0.17
					NOx	0.09

(1) WLTC: Worldwide Harmonized Light Vehicle Test Cycle, 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 NOx 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; NOx: Nitrogen oxides; PM: Particulate matter.  
Sources: Ministry of the Environment; Ministry of Land, Infrastructure, Transport and Tourism

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 Vehicle 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. The indication wherever necessary of fuel consumption rates measured in the three driving “modes” as well as their certified mean (i.e., average) rate has been required since 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

JC08

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

WLTC

20.4 km/L

Urban mode (2)

15.2km/L

Rural mode (2)

21.4km/L

Expressway mode (2)

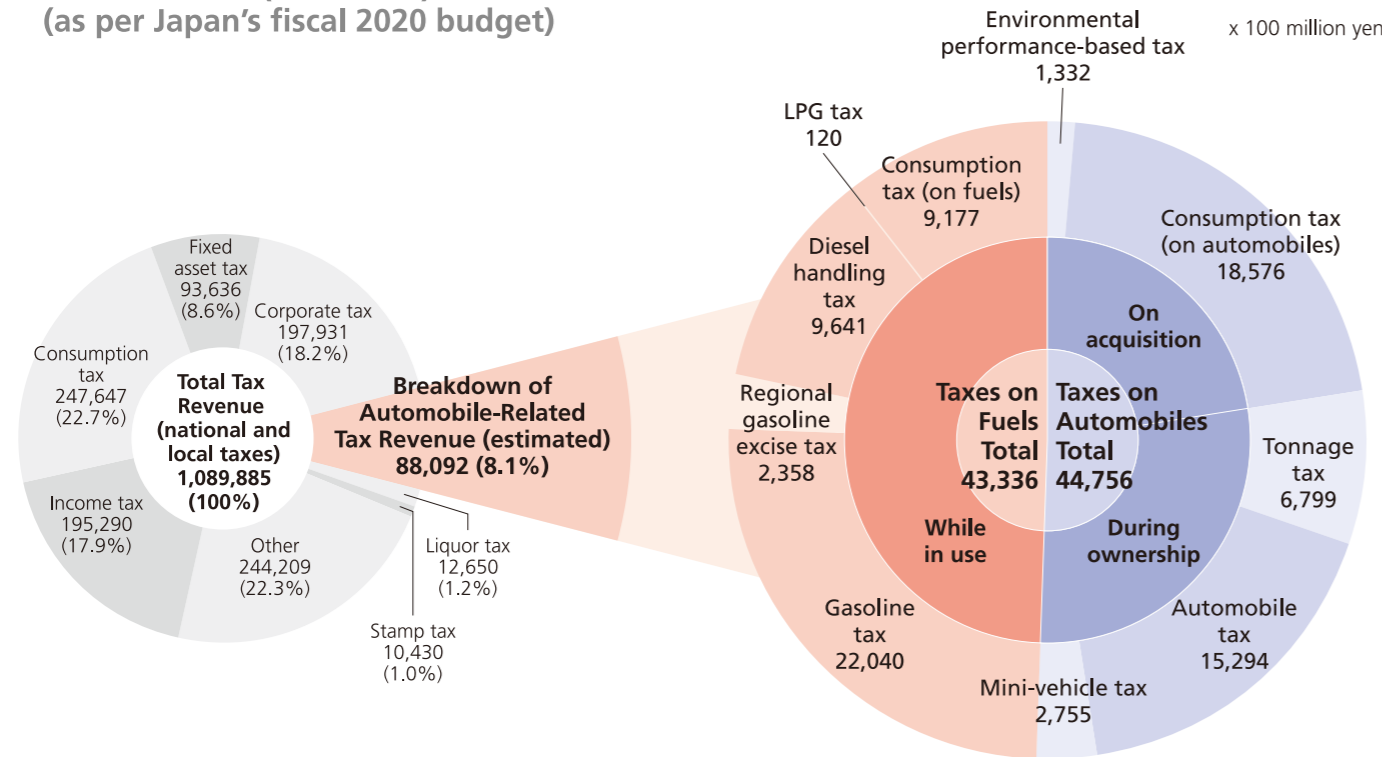
23.2km/L

(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

9 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 2020, the total value of tax revenue from these automobile-related taxes has been estimated at 9.0 trillion yen, or 8.1% of Japan’s projected total tax revenue of 109 trillion yen in fiscal 2019.

TAX REVENUE (Estimated) BY SOURCE IN FISCAL 2020 (as per Japan’s fiscal 2020 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 2.2% 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, 2020)

Tax Category	On Acquisition		During Ownership	
	Environmental Performance-Based Tax	Consumption Tax	Tonnage Tax	
How Assessed	Assessed on the acquisition of an automobile, whether new or used, based on its enviromental performance	Assessed on the purchase price of the automobile	Assessed according to vehicle weight at each mandatory vehicle inspection	
National/Local Tax	Prefectural and municipal tax	National and local tax	National tax	
Tax Rate/ Amount	(Private use) - 0 to 3% of purchase price (0 to 2% for commercial vehicles and mini-vehicles) - Exempted for vehicles purchased for ¥500,000 or less Note: A provisional 1% reduction applies to the environmental performance-based tax, from October 2019 through March 2021 (see page 43). Highly fuel-efficient vehicles and alternative-energy vehicles are exempted from the tax.	10% (of which 2.2% is a local tax)	1) Eco-friendly vehicles: ¥2,500/0.5t/year (= base rate) for private-use passenger cars 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 from May 2019 through April 2021 (see page 40).	

JAPAN’S ESTIMATED AUTOMOBILE-RELATED TAX REVENUE IN FISCAL 2020

			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 During ownership	Environmental performance-based tax	1,332	0 to 3%	0 to 3% (commercial and mini-vehicles excluded)	0 to 1.00
		Consumption tax (on automobiles)	18,576	10%		
		Tonnage tax	6,799	¥2,500/0.5t/year (e.g., passenger car for private use)	¥4,100/0.5t/year (e.g., passenger car for private use)	1.64
		Automobile tax	15,294	Based on engine capacity (e.g., for 1,001≤1,500cc passenger cars for private use, ¥30,500/year; see below)		
		Mini-vehicle tax	2,755	¥10,800/year (passenger cars for private use)		
		Total	44,756			
Taxes on Fuels	While in use	Gasoline tax	22,040	¥24.3/L	¥48.6/L	2.00
		Regional gasoline excise tax	2,358	¥4.4/L	¥5.2/L	1.18
		Diesel handling tax	9,641	¥15.0/L	¥32.1/L	2.14
		LPG tax	120	¥17.5/kg		1.00
		Consumption tax (on fuels)	9,177	10%		
		Total	43,336			
Grand Total			88,092			

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, 2020.

TAX RATES IN EFFECT (Examples), 1954-2020, TO SUPPORT ROAD NETWORK IMPROVEMENTS

Duration	“Five-Year” Plan	Fiscal Year	Acquisition Tax	Environmental Performance-Based Tax	Tonnage Tax ¥/0.5t/year	Gasoline Tax ¥/L	Regional Gasoline Excise Tax ¥/L	Diesel Handling Tax ¥/L	LPG Tax ¥/kg
1954-57	First	1954 1955 1956 1957	<div>[Commercial and mini-vehicles excluded]</div> <div>3%</div> <div>5%</div> <div>3% Abolished</div>	<div>[In the case of a passenger car for private use]</div> <div>2,500</div> <div>5,000 6,300</div> <div>6,300 5,000 4,100 (2,500*)</div> <div>0 to 3%</div>	<div>13.0 11.0 14.8 19.2 22.1 24.3</div> <div>29.2 5,000 36.5 45.6 48.6</div>	<div>2.0 3.5 4.0 4.4 5.3 6.6 8.2 5.2</div>	<div>6.0 8.0 10.4 12.5 15.0 19.5 24.3 32.1</div>	<div>5 10 17.5</div>	
1958-60	Second	1959							
1961-63	Third	1961							
1964-66	Fourth	1964 1966							
1967-69	Fifth	1967 1968							
1970-72	Sixth	1970 1971							
1973-77	Seventh	1974 1976							
1978-82	Eighth	1979							
1983-87	Ninth								
1988-92	Tenth								
1993-97	Eleventh	1993							
1998-2002	Twelfth	1998							
2003-07	As per the national priority infrastructure development plan								
2008-	As per the national medium-term road infrastructure plan								
		2010 2012 2014 2019 2020							
Comparison with base tax rate (multiplier value)				0 to 1.00	1.64	2.00	1.18	2.14	1.00

\*The base tonnage tax rate (¥2,500/0.5t/year as of May 1, 2020) is applied only to eco-friendly vehicles.

Source: Japan Automobile Manufacturers Association

		While in Use				
Automobile Tax	Mini-Vehicle Tax	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 ¥25,000/year - 1,001 to 1,500cc ¥30,500/year - 1,501 to 2,000cc ¥36,000/year - 2,001 to 2,500cc ¥43,500/year - 2,501 to 3,000cc ¥50,000/year - 3,001 to 3,500cc ¥57,000/year - 3,501 to 4,000cc ¥65,500/year - 4,001 to 4,500cc ¥75,500/year - 4,501 to 6,000cc ¥87,000/year - Over 6,000cc ¥110,000/year Note: Above tax rates apply to new private-use passenger cars registered on or after October 1, 2019 (see page 42).	1) Mini-vehicles for private use: - Passenger cars ¥10,800/year - Trucks ¥5,000/year Note: Above tax rates apply to new vehides 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 41).	¥48.6/L	¥5.2/L	¥32.1/L (light oil)	¥17.5/kg (LPG)	10% of the purchase price of fuels (of which 2.2% 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. Updated incentives and eligibility requirements came into effect in April and May 2019 and their effective periods were extended for two years with the exception of the incentives for the acquisition tax, which expired at the end of September 2019 when the acquisition tax was abolished.

INCENTIVES & ELIGIBILITY REQUIREMENTS

● TONNAGE TAX REDUCTIONS/EXEMPTIONS

Period in effect: May 1, 2019 through April 30, 2021.

1. Passenger Cars

Requirements		When Imposed	Reductions/Exemptions					
<b>• Electric vehicles • Fuel cell vehicles</b> <b>• Natural gas vehicles</b> (with NOx emissions down by 10% from 2009 emission standards, or complying with 2018 emission standards) <b>• Plug-in hybrid vehicles</b> <b>• Clean diesel passenger cars</b> (complying with 2009 or 2018 emission standards)		@ Initial & first vehicle inspections	Exempt (1)					
<b>Gasoline vehicles/ LPG vehicles</b> (including hybrids)	Fuel efficiency		2020 Fuel Efficiency Standards					
	Emissions level		Compliant	+10%	+20%	+30%	+40%	+90%
	Down by 75% from 2005 standards or Down by 50% from 2018 standards		@ Initial vehicle inspection	25% reduction	50% reduction	Exempt (2)		

2. Small Trucks and Buses (GVW≤2.5t)

Requirements		When Imposed	Reductions/Exemptions					
<b>• Electric vehicles • Fuel cell vehicles</b> <b>• Natural gas vehicles</b> (with NOx emissions down by 10% from 2009 emission standards, or complying with 2018 emission standards) <b>• Plug-in hybrid vehicles</b>		@ Initial & first vehicle inspections	Exempt (1)					
<b>Gasoline vehicles</b> (including hybrids)	Fuel efficiency		2015 Fuel Efficiency Standards					
	Emissions level		+5%	+10%	+15%	+20%	+25%	
	Down by 75% from 2005 standards or Down by 50% from 2018 standards		@ Initial vehicle inspection	25% reduction	50% reduction	75% reduction	Exempt	

3. Mid-Sized Trucks and Buses (2.5t<GVW≤3.5t)

Requirements		When Imposed	Reductions/Exemptions			
<b>• Electric vehicles • Fuel cell vehicles</b> <b>• Natural gas vehicles</b> (with NOx emissions down by 10% from 2009 emission standards, or complying with 2018 emission standards) <b>• Plug-in hybrid vehicles</b>		@ Initial & first vehicle inspections	Exempt (1)			
<b>Gasoline vehicles</b> (including hybrids)	Fuel efficiency		2015 Fuel Efficiency Standards			
	Emissions level		+5%	+10%	+15%	
	Down by 75% from 2005 standards or Down by 50% from 2018 standards		50% reduction	75% reduction	Exempt	
<b>Diesel vehicles</b> (including hybrids)	Down by 50% from 2005 standards or Down by 25% from 2018 standards		@ Initial vehicle inspection	No incentive	50% reduction	75% reduction
	NOx and PM emissions down by 10% from 2009 standards or Compliant with 2018 emission standards			50% reduction	75% reduction	Exempt
	Compliant with 2009 emission standards			No incentive	50% reduction	75% reduction

4. Heavy-Duty Trucks and Buses (GVW>3.5t)

Requirements		When Imposed	Reductions/Exemptions			
<b>• Electric vehicles • Fuel cell vehicles</b> <b>• Natural gas vehicles</b> (with NOx emissions down by 10% from 2009 emission standards) <b>• Plug-in hybrid vehicles</b>		@ Initial & first vehicle inspections	Exempt (1)			
<b>Diesel vehicles</b> (including hybrids)	Fuel efficiency		2015 Fuel Efficiency Standards			
	Emissions level		+5%	+10%	+15%	
	NOx and PM emissions down by 10% from 2009 standards or Compliant with 2016 emission standards		@ Initial vehicle inspection	50% reduction	75% reduction	Exempt

(1) An initial inspection is mandated for a new vehicle purchase; exemption at the time of first vehicle inspection post-purchase applies only when the new inspection certificate is issued within 15 days following expiration of the old certificate. (2) For vehicles compliant +90% with 2020 fuel efficiency standards, exemption applies on initial inspection mandated for new vehicle purchase and at the time of first vehicle inspection post-purchase (only when the new inspection certificate is issued within 15 days following expiration of the old certificate).

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

Period in effect (ASVs): May 1, 2018 through April 30, 2021.

Period in effect (AMVs): May 1, 2018 through March 31, 2021.

Vehicle Type		Reductions/Exemptions
<b>ASVs</b> equipped with one of three systems	Collision-mitigation braking system	50% reduction (1), (2)
	Electronic stability control system	
	Lane departure warning system	25% reduction (1), (2)
ASVs equipped with more than one of the above systems		Up to 75% reduction (1), (2)
<b>AMVs</b>	Low-floor (“non-step”) buses (for use in public/charter transport)	Exempt (2)
	Buses equipped with an electric lift (for use in public/charter transport)	Exempt (2)
	Universal design-based taxis (for use in public transport)	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.  
Notes: 1. When vehicles targeted by this scheme are also covered by the eco-friendly vehicle tax incentives scheme, the most favorable tax incentive between the two schemes is applied; when the tax incentive is identical in both schemes, it is implemented under the eco-friendly vehicle tax incentives scheme. 2. Acquisition tax incentives that were in effect for the vehicles listed above until October 1, 2019 will remain in force through March 31, 2021, as part of the new framework of automotive environmental performance-based tax measures (see page 43 for more information on those measures).

● FISCAL 2019 & 2020 SPECIAL AUTOMOBILE TAX REDUCTIONS  
(Passenger Cars and Trucks & Buses)

Requirements		Reduction
<b>Passenger Cars</b>	<b>Electric vehicles/Fuel cell vehicles/Plug-in hybrid vehicles/ Clean diesel passenger cars</b> (1)/ <b>Natural gas vehicles</b> (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)
<b>Trucks &amp; Buses</b>	<b>Electric vehicles/Fuel cell vehicles/Plug-in hybrid vehicles/Natural gas vehicles</b> (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.  
Notes: 1. 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. 2. In and after 2021, only electric vehicles, fuel cell vehicles, plug-in hybrid vehicles, natural gas vehicles, and clean diesel passenger cars will be eligible for the tax reduction.

● FISCAL 2019 & 2020 SPECIAL MINI-VEHICLE TAX REDUCTIONS (Minicars and Mini-Trucks) \*

Requirements		Reduction
<b>Minicars</b>	<b>Electric vehicles/Fuel cell vehicles/Natural gas vehicles</b> (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)
<b>Mini-Trucks</b>	<b>Electric vehicles/Fuel cell vehicles/Natural gas vehicles</b> (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)

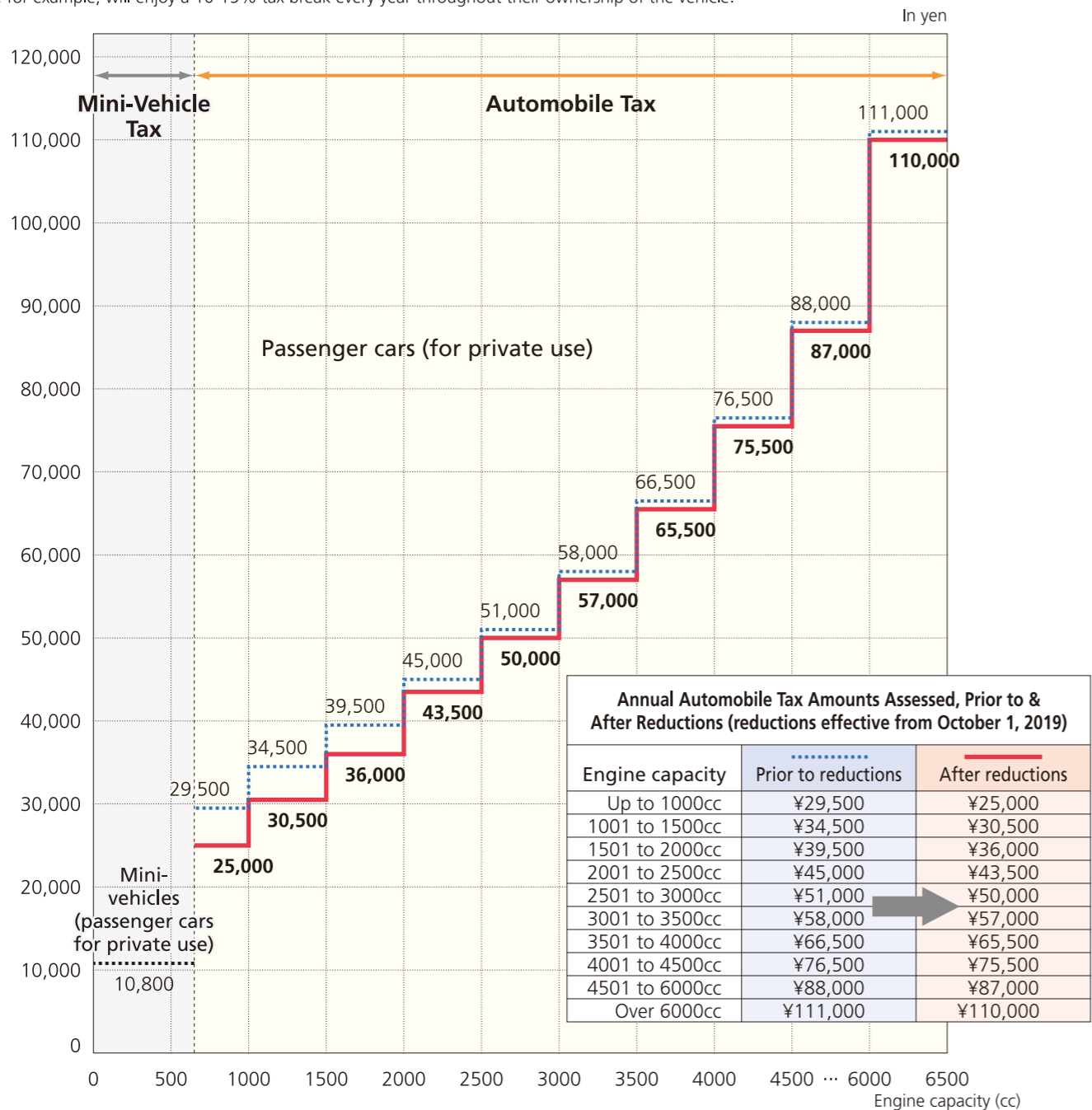
\*Applies only to three- or four-wheeled mini-vehicles at the time of new vehicle registration.  
(1) With NOx emissions down by 10% from 2009 emission standards, or complying with 2018 emission standards. (2) Reductions effective on initial inspection mandated for new vehicle purchase are applied in the fiscal year following the year of purchase.  
Notes: 1. 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. 2. In and after 2021, only electric vehicles, fuel cell vehicles, and natural gas vehicles will be eligible for the tax reduction.

# Automobile Tax Reduced and Automotive Environmental Performance-Based Tax Implemented

In tandem with the increase in the consumption tax rate to 10% in October 2019, reductions in the automobile tax on private-use passenger cars registered for the first time on or after October 1, 2019 came into effect, to ease the tax burden on vehicle owners and help balance market demand prior to and following the consumption tax hike. In addition, a provisional reduction of 1% on the automotive environmental performance-based tax (see opposite page) was originally to be accorded to private-use passenger vehicles, including mini- and used vehicles, purchased within one year from October 1, 2019, as a further measure to prevent the demand for automobiles, which are major consumer durables, from spiking before, and consequently plunging after, the increase in the consumption tax. However, the applicable period for that tax reduction was subsequently extended by six months, i.e., through March 31, 2021, in consideration of the impacts of the COVID-19 pandemic on the automobile market.

## REDUCTIONS IN THE AUTOMOBILE TAX (permanent tax cuts)

Reductions (of which exact amounts are determined by engine capacity) in the automobile tax apply to all private-use passenger cars registered for the first time on or after October 1, 2019. These reductions, which are permanent, are the first to be applied across the board, to passenger cars of any engine capacity, since the establishment of Japan's automobile tax regimen in 1950. Purchasers of a passenger car with an engine capacity of 2,000cc or less, for example, will enjoy a 10-15% tax break every year throughout their ownership of the vehicle.



## ABOLITION OF THE ACQUISITION TAX

The acquisition tax imposed at the time of new or used vehicle purchase was abolished effective from October 1, 2019, in tandem with the increase (to 10%) in the consumption tax rate.

### Acquisition tax rates (applicable through September 30, 2019)

Acquisition Tax	Passenger vehicles (for private use)	3%
	Commercial vehicles, mini-vehicles	2%

➔ Abolished on October 1, 2019

## IMPLEMENTATION OF TAXATION ON AUTOMOTIVE ENVIRONMENTAL PERFORMANCE

- From October 1, 2019, an automotive environmental performance-based tax came into effect as an adjunct provision to the automobile tax and the mini-vehicle tax. It is imposed at the time of vehicle (passenger car, mini-vehicle, heavy-duty vehicle, etc.) purchase and calculated on the basis of the vehicle's environmental (i.e., fuel efficiency, emissions) performance and its purchase price.
- The new tax applies to both new and used vehicles, with the exception of vehicles purchased for ¥500,000 or less, which are exempted from the tax.
- The fuel efficiency and other environmental performance criteria on the basis of which the tax's varying rates (e.g., from 0% to 3% for passenger vehicles and from 0% to 2% for commercial vehicles and mini-vehicles) have been determined are in line with criteria established in Japan's Energy Conservation Law. Highly fuel-efficient vehicles as well as alternative-energy vehicles are exempted from the tax.
- For vehicles purchased between October 1, 2019 and March 31, 2021, a provisional 1% reduction on this tax is in application.

### Environmental Performance-Based Tax for Private-Use Passenger Vehicles (including mini- and used vehicles)

	Alternative-energy vehicles*	2020 Fuel Efficiency Standards			Other
		+20%	+10%	Compliant	
Passenger cars	Exempt from tax		1% of VPP	2% of VPP	3%
Mini-vehicles	Exempt from tax			1% of VPP	2%

\*Electric, fuel cell, plug-in hybrid and natural gas vehicles and clean diesel passenger cars

VPP: Vehicle purchase price

Note: Above tax rates will be applied to vehicles registered on or after April 1, 2021, following the expiration of the provisional 1% reduction on these rates.

### Environmental Performance-Based Tax for Private-Use Heavy-Duty Vehicles

	Alternative-energy vehicles*	2015 Fuel Efficiency Standards			
		+10%	+5%	Compliant	Not compliant
Heavy-duty vehicles	Exempt from tax		1% of VPP	2% of VPP	3% of VPP

\*Electric, fuel cell, plug-in hybrid and natural gas vehicles

VPP: Vehicle purchase price

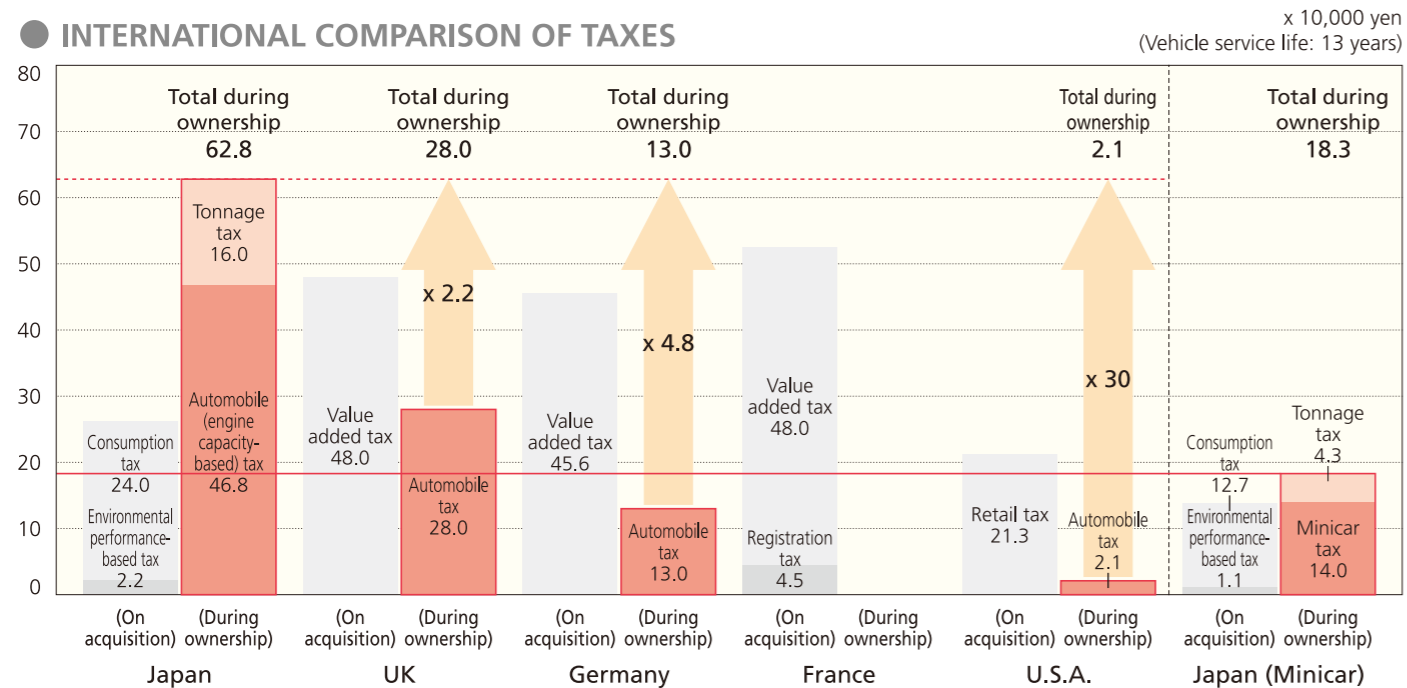
### Provisional Automotive Environmental Performance-Based Tax Reduction (in effect from October 1, 2019 through March 31, 2021)

A 1% reduction on the automotive environmental performance-based tax will be in effect for private-use passenger vehicles (including mini- and used vehicles) purchased between October 1, 2019 and March 31, 2021.

Reductions for Passenger Cars		Reductions for Mini-Vehicles	
Basic rate	Reduced rate (2019/10 through 2021/3)	Basic rate	Reduced rate (2019/10 through 2021/3)
Exempt	Exempt	Exempt	Exempt
1%	Exempt	1%	Exempt
2%	1%	2%	1%
3%	2%		

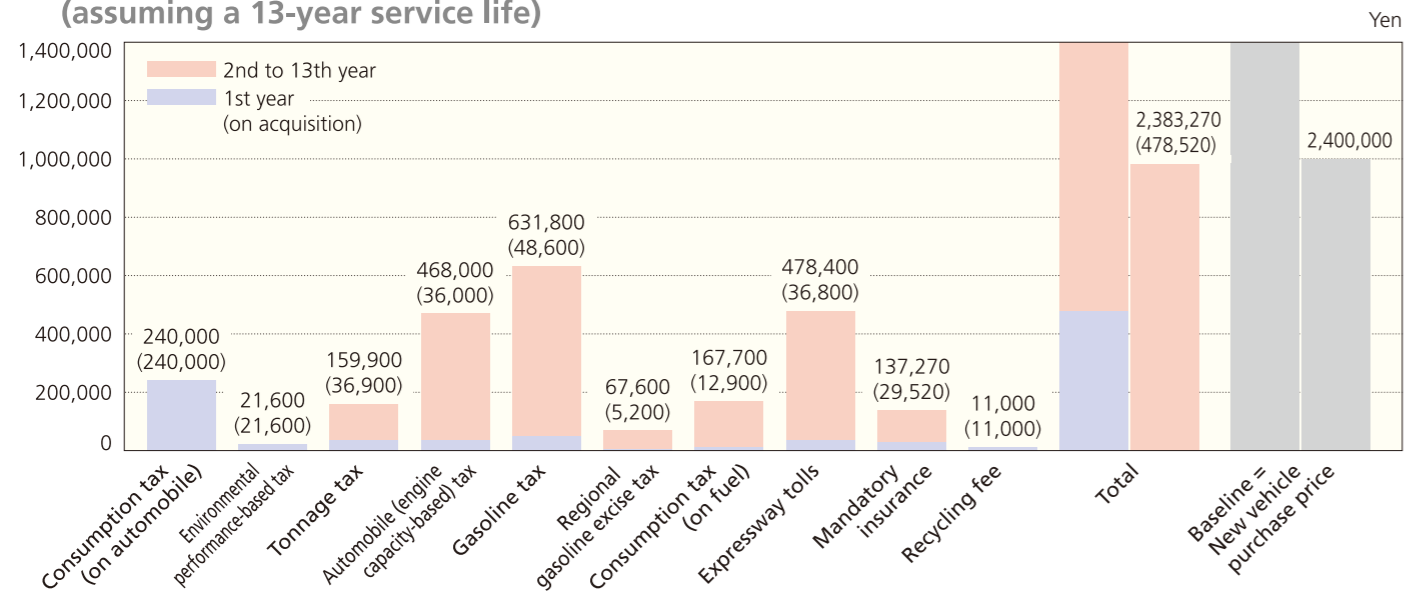
## Automobile-Related Taxes Are Onerous

Consider the case of a passenger car costing 2.40 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 1.8 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.



Assumptions: 1) Engine capacity: 2000cc. 2) GVW≤1.5t. 3) Purchase price: ¥2.40 million (¥1.27 million for a minicar). 4) Fuel consumption (JC08 test cycle-based): 20.1km/L (CO<sub>2</sub> emissions: 116g/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 122, GBP 1 = JPY 142, USD 1 = JPY 110 (averaged April 2019-March 2020).  
Notes: 1. Figures here are based on tax rates in effect as of April 2020. 2. Figures here do not take into account applicable incentives/surcharges, such as tax incentives for eco-friendly vehicles in Japan, if any.

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

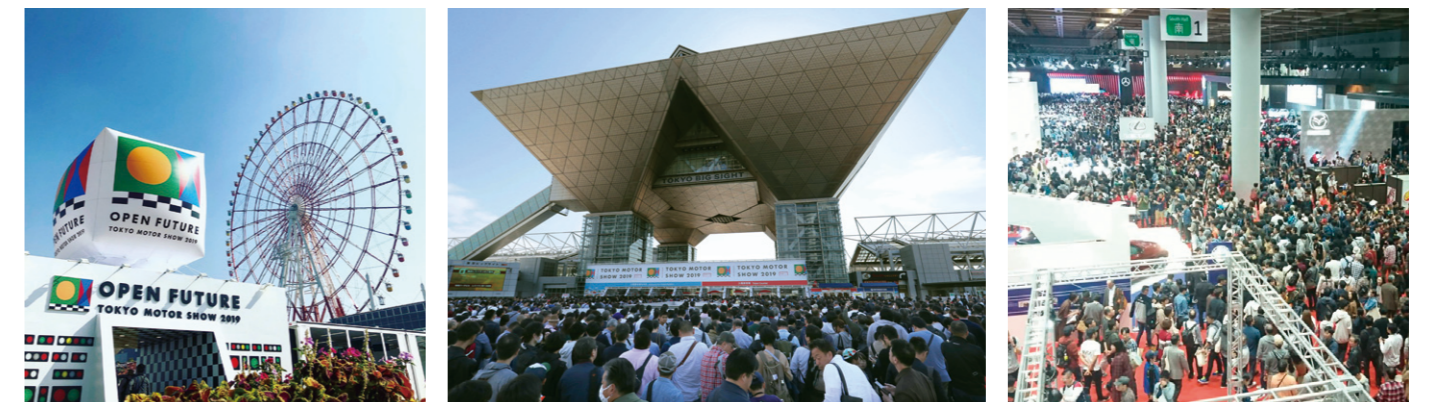


Assumptions: 1) A passenger car with 2000cc engine capacity and purchase price of ¥2.40 million (retail price, excluding consumption tax). 2) GVW≤1.5t. 3) Annual fuel consumption: 1,000 liters. 4) Tonnage tax imposed yearly, but collected only at time of mandatory vehicle inspection. 5) Tax amounts reflect rates in effect at April 1, 2020. 6) Consumption tax = 10% of retail price. 7) The recycling fee indicated is the average rate for a 2000cc 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, 2020). 2. Value of expressway tolls was estimated by JAMA based on expressway toll revenue in 2018.

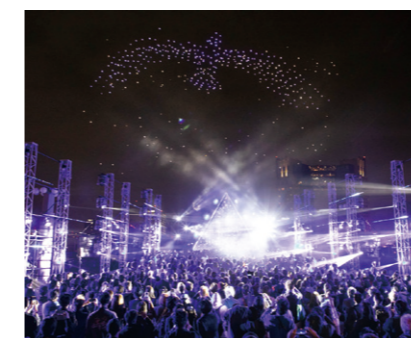
Source: Japan Automobile Manufacturers Association

## 1.3 Million People Visited the Futuristic Motor Show

The 46th Tokyo Motor Show 2019 was held at the Tokyo Big Sight (including the Aomi, West and South exhibition halls), Mega Web and Symbol Promenade Park venues in Tokyo Waterfront City for 12 days, from October 24 through November 4, 2019. "OPEN FUTURE" was the theme of the show, in which 192 globally active corporations and organizations, representing a broad range of industries, participated. The show's expanded scope focused not only on the exciting world of cars and motorcycles, but on new themes such as "Homes of the Future" and "Cities of the Future" as well, making it possible for a total of 1,300,900 visitors to experience the future of mobility and get a glimpse of a future "mobility society."



In addition to cars and motorcycles, the latest technologies from various industries were gathered under one roof at the "FUTURE EXPO" pavilion. Visitors were able to experience the near future at this exhibit, which inspired great expectations for Japanese technological prowess and the future of Japan. Another highlight of the 46th Tokyo Motor Show was the "Out of KidZania in TMS 2019" program. A first-of-its-kind collaborative event with KidZania, a family-oriented amusement park enterprise, it was a remarkable crowd-puller, enabling participating children to roleplay working, hands-on, at various automobile-related occupations.



Moreover, multiple contests featuring a range of mobility platforms equipped with innovative technologies were hosted at the 2019 Tokyo Motor Show. Notable ones were the e-Motorsports competition, a hugely popular game among younger generations that uses the Gran Turismo Sport software from PlayStation®4, Japan's first-ever FAI-certified drone race, and the pioneering Tokyo Motor Show Drone Show.\*

The 46th Tokyo Motor Show was enjoyed by visitors of all ages, from Japan and overseas. Particularly noteworthy were the many youngsters who visited the show, as attested to by the 170% increase compared to the previous show in visitors aged under 14 years.

### SHOW LOGO



\*The Tokyo Motor Show Drone Show was performed with the permission, approval and guidance of the East Japan Civil Aviation Bureau of the Ministry of Land, Infrastructure, Transport and Tourism, the Tokyo Coast Guard Office of the 3rd Regional Coast Guard Headquarters of the Japan Coast Guard, and the Bureau of Port and Harbor of the Tokyo Metropolitan Government.

82.16 Million People Hold Driver’s Licenses

At the end of 2019 there were 82.16 million people, or 44.78 million men and 37.38 million women, holding valid driver’s licenses in Japan. The number of driver’s licenses held totalled 126.58 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 1.95 million people, or 1.88 million men and 70,000 women, and Class 1 licenses by 124.63 million people, or 79.70 million men and 44.93 million women.

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

Year	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Men	45,487,010	45,448,263	45,437,260	45,463,791	45,430,245	45,344,259	45,255,994	45,133,771	44,994,702	44,778,696
Women	35,523,236	35,767,003	36,050,586	36,396,221	36,645,978	36,805,749	36,949,917	37,121,424	37,320,222	37,379,732
Total	81,010,246	81,215,266	81,487,846	81,860,012	82,076,223	82,150,008	82,205,911	82,255,195	82,314,924	82,158,428

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

Year		2013	2014	2015	2016	2017	2018	2019
Class 2 Licenses	Large motor vehicle	1,007,743	986,518	964,383	942,526	919,242	896,127	871,492
	Middle-category motor vehicle	1,002,043	960,304	917,142	873,879	1,055,123	1,001,038	944,325
	Ordinary motor vehicle	220,403	224,823	229,494	234,070	13,318	29,358	45,103
	Large special-purpose vehicle	45,041	44,330	43,605	42,997	42,302	41,560	40,913
	Traction vehicle	50,473	49,665	48,844	48,134	47,325	46,446	45,614
	Subtotal	2,325,703	2,265,640	2,203,468	2,141,606	2,077,310	2,014,529	1,947,447
Class 1 Licenses	Large motor vehicle	5,299,480	5,253,880	5,198,185	5,143,533	5,086,713	5,027,351	4,959,169
	Middle-category motor vehicle	71,409,459	70,632,500	69,732,685	68,813,808	67,870,730	66,958,774	65,855,860
	Quasi-middle-category motor vehicle	—	—	—	—	11,739,992	11,707,930	11,686,402
	Ordinary motor vehicle	7,936,169	9,113,940	10,297,590	11,473,646	905,528	2,067,271	3,207,204
	Large special-purpose vehicle	2,465,978	2,473,823	2,476,598	2,475,520	2,471,164	2,466,107	2,453,392
	Traction vehicle	1,168,205	1,174,267	1,178,790	1,182,806	1,187,003	1,191,690	1,195,020
	Large two-wheeler	10,703,691	10,430,075	10,112,584	9,799,816	9,466,072	9,126,995	8,764,619
	Ordinary two-wheeler	9,472,692	9,619,692	9,752,541	9,877,616	9,994,091	10,116,497	10,242,096
	Small special-purpose vehicle	477,296	450,123	422,020	394,952	367,603	341,013	314,838
	Motorized bicycle	16,905,848	16,784,700	16,618,061	16,450,534	16,291,972	16,142,848	15,950,023
Total		128,164,521	128,198,640	127,992,522	127,753,837	127,458,178	127,161,005	126,576,070

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

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 illustrated vanity plates are obtainable in designated regions.

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

Standard

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

Over 2m

Over 1.7m

Over 4.7m

Small

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

2m and under

Over 1.48m to 1.7m

Over 3.4m to 4.7m

Mini

660cc and under in engine capacity

2m and under

1.48m and under

3.4m and under

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	Middle Category	Quasi-Middle Category
Gross vehicle weight: ≥11 tons Payload: ≥6.5 tons or Occupancy: ≥30 persons	Gross vehicle weight: 7.5≤tons<11 Payload: 4.5≤tons<6.5 or Occupancy: 11≤persons<30	Gross vehicle weight: 3.5≤tons<7.5 Payload: 2≤tons<4.5

Ordinary	Large/Small Special-Purpose Motor Vehicles
Motor vehicles that do not meet the classification requirements for large, middle category, quasi-middle category or large/small special-purpose motor vehicles, or for large or ordinary motorcycles.	Motor vehicles with caterpillar treads such as bulldozers, steamrollers, graders, snowplows, tractors, etc. 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,* and up to 1.7m in width.

\*Projections on small special-purpose vehicles should not exceed 2.8m.

● CLASSIFICATION OF MOTORCYCLES

Road Vehicles Act					
Category	Engine Capacity	Rated Output	Width	Height	Length
Small-sized	Over 250cc	Over 1.00kW	Over 1.3m	Over 2.0m	Over 2.5m
Mini-sized	126cc to 250cc	Over 1.00kW	1.3m and under	2.0m and under	2.5m and under
Motor-driven cycle Class 2	51cc to 125cc	Over 0.60kW to 1.00kW	1.3m and under	2.0m and under	2.5m and under
Motor-driven cycle Class 1	50cc and under	0.60kW and under	1.3m and under	2.0m and under	2.5m and under

Road Traffic Act		
Category	Engine Capacity	Rated Output
Large	Over 400cc	Over 20.00kW
Ordinary	51cc to 400cc	Over 0.60kW to 20.00kW
Motorized bicycle	50cc and under	0.60kW 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

Number Assignment  
From “1” to “99-99”

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るろを

Commercial business use りれ

Rental vehicle わ

Foreign military vehicle AB

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

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

Designated Number Categories Indicating Vehicle Type

Ordinary trucks 1, 10-19, 100-199, 10A-19Z, 1A0-1Z9, 1AA-1ZZ

Ordinary buses 2, 20-29, 200-299, 20A-29Z, 2A0-2Z9, 2AA-2ZZ

Ordinary passenger cars 3, 30-39, 300-399, 30A-39Z, 3A0-3Z9, 3AA-3ZZ

Three- or four-wheeled small trucks 4, 40-49, 400-499, 40A-49Z, 4A0-4Z9, 4AA-4ZZ

6, 60-69, 600-699, 60A-69Z, 6A0-6Z9, 6AA-6ZZ

Three- or four-wheeled small passenger cars and small buses 5, 50-59, 500-599, 50A-59Z, 5A0-5Z9, 5AA-5ZZ

7, 70-79, 700-799, 70A-79Z, 7A0-7Z9, 7AA-7ZZ

Special-purpose vehicles 8, 80-89, 800-899, 80A-89Z, 8A0-8Z9, 8AA-8ZZ

Large special-purpose vehicles 9, 90-99, 900-999, 90A-99Z, 9A0-9Z9, 9AA-9ZZ

Large special-purpose vehicles used as construction machinery 0, 00-09, 000-099, 00A-09Z, 0A0-0Z9, 0AA-0ZZ

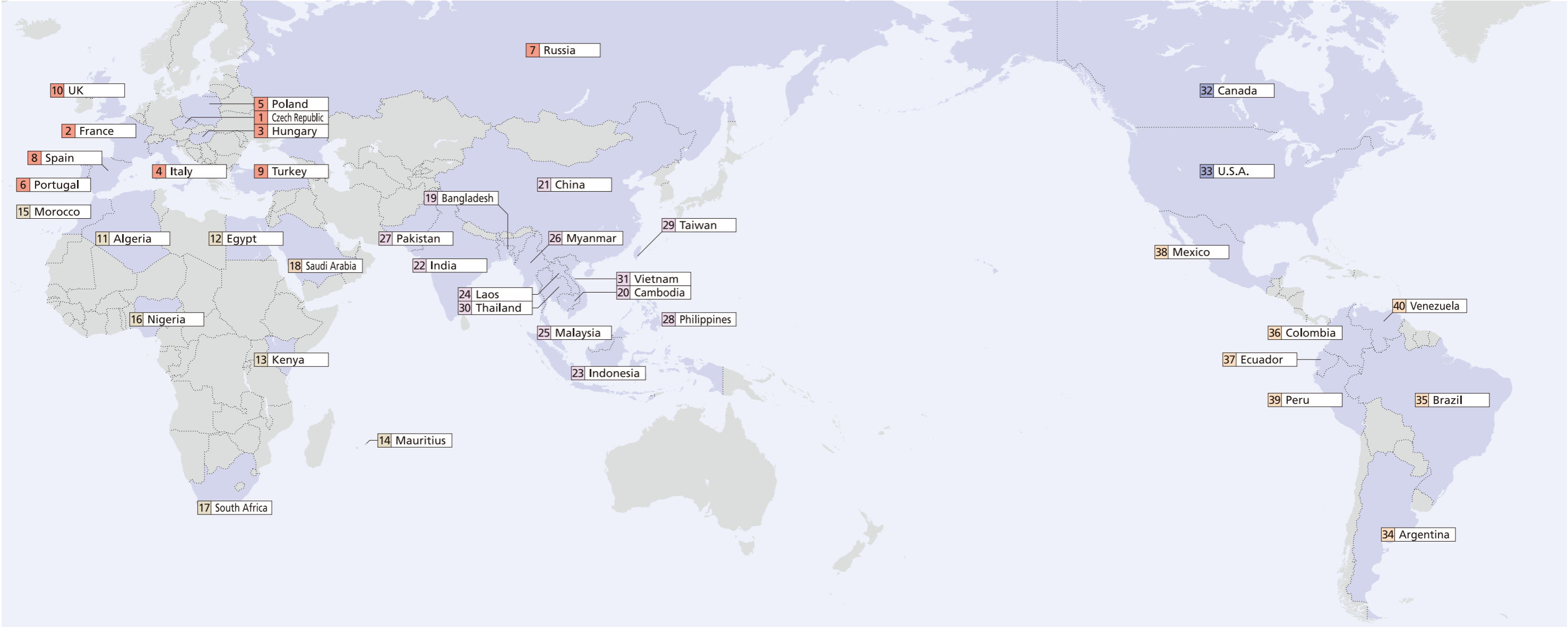
Source: Ministry of Land, Infrastructure, Transport and Tourism

# 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, more recently, Russia and other countries with emerging markets. These operations contribute to the strengthening of

local 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.

## ● 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	-	2
Poland	5	-	-	-	1
Portugal	6	2	-	-	-
Russia	7	6	-	-	-
Spain	8	1	-	-	1
Turkey	9	4	-	-	-
UK	10	3	-	-	1
Europe Total		19	2	-	5

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					
Saudi Arabia	18	1	-	-	-
Middle East Total		1	-	-	-

## 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	19	3	2	-	-
Cambodia	20	-	1	-	-
China	21	19	10	-	19
India	22	11	7	-	2
Indonesia	23	15	7	1	15
Laos	24	-	1	-	-
Malaysia	25	12	2	-	6
Myanmar	26	3	-	-	-
Pakistan	27	5	3	1	-
Philippines	28	6	4	-	4
Taiwan	29	7	2	-	1
Thailand	30	15	4	-	9
Vietnam	31	7	3	2	3
Asia Total		103	46	4	59

Country/ Territory	Country No. (see map)	Motor Vehicles (incl. parts)	Motor- cycles (incl. parts)	Motor Vehicles & Motorcycles (incl. parts)	Parts Only
North America					
Canada	32	5	-	-	2
U.S.A.	33	14	1	-	11
North America Total		19	1	-	13
Latin America					
Argentina	34	1	1	1	-
Brazil	35	7	4	-	5
Colombia	36	1	2	-	-
Ecuador	37	1	-	-	-
Mexico	38	9	1	1	1
Peru	39	-	1	-	-
Venezuela	40	1	-	-	-
Latin America Total		20	9	2	6
World Total		181	61	6	83

Source: Japan Automobile Manufacturers Association

Japanese Automakers' Overseas Production Finishes at 18.85 Million Automobiles and 26.85 Million Motorcycles

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 48-49). Japanese automakers' overseas production in 2019 totalled 18.85 million automobiles and 26.85 million motorcycles.

OVERSEAS PRODUCTION BY JAPANESE AUTOMOBILE MANUFACTURERS In vehicle units

Year	Asia	Middle East	Europe	EU	North America	U.S.A.	Latin America	Africa	Oceania	Total
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	10,870,888	0	1,940,778	1,511,800	4,767,063	3,765,364	1,903,466	198,625	60,942	19,741,762
2018	11,391,185	0	1,856,511	1,415,747	4,606,948	3,676,823	1,894,346	216,969	0	19,965,959
2019	10,850,075	0	1,638,200	1,223,117	4,407,151	3,531,395	1,745,597	211,761	0	18,852,784

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. Since December 2017, data from one JAMA member manufacturer has not been available. Source: Japan Automobile Manufacturers Association

OVERSEAS PRODUCTION BY JAPANESE MOTORCYCLE MANUFACTURERS In vehicle units

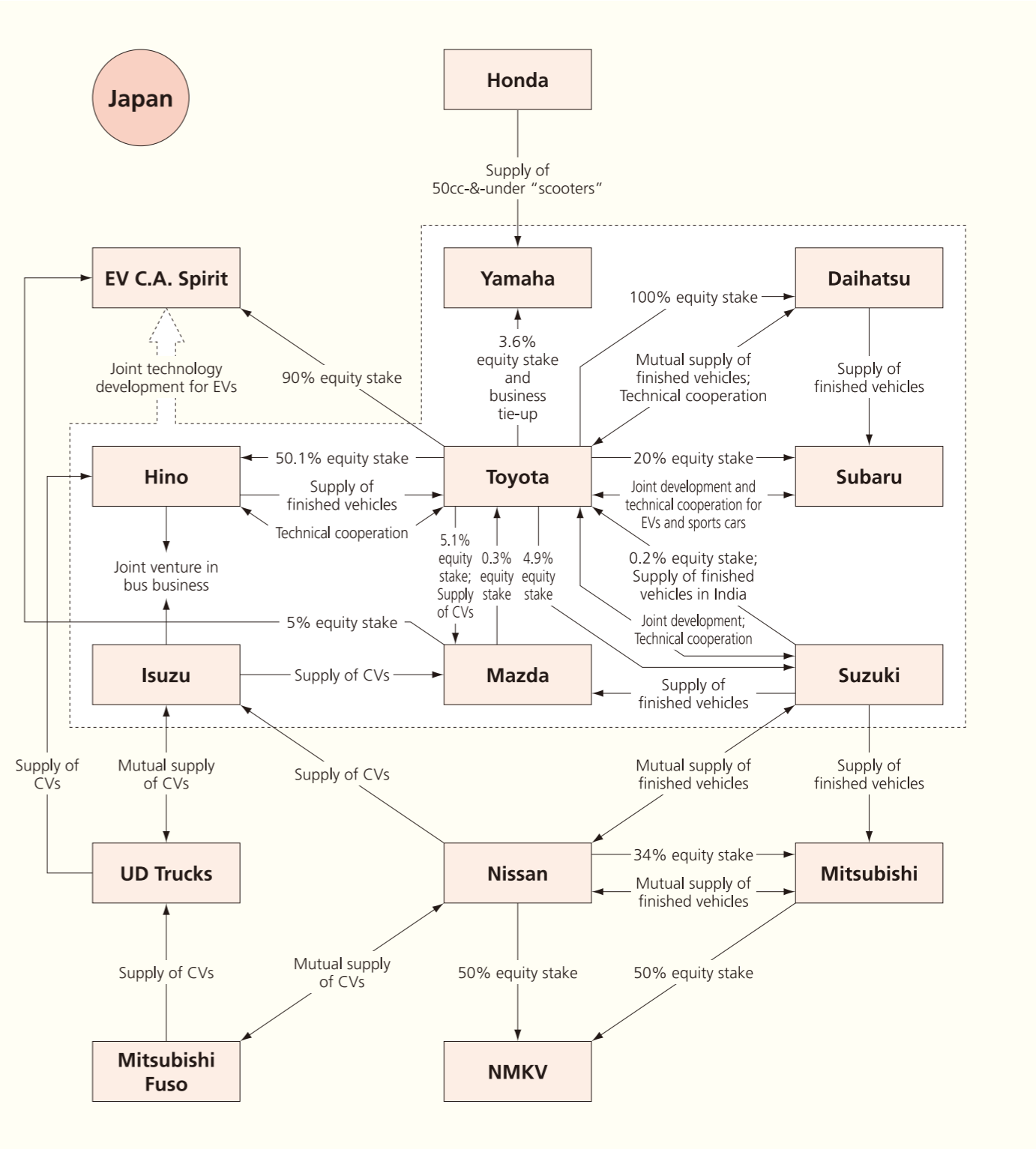
Year	Total
2019	26,850,264

Source: Japan Automobile Manufacturers Association

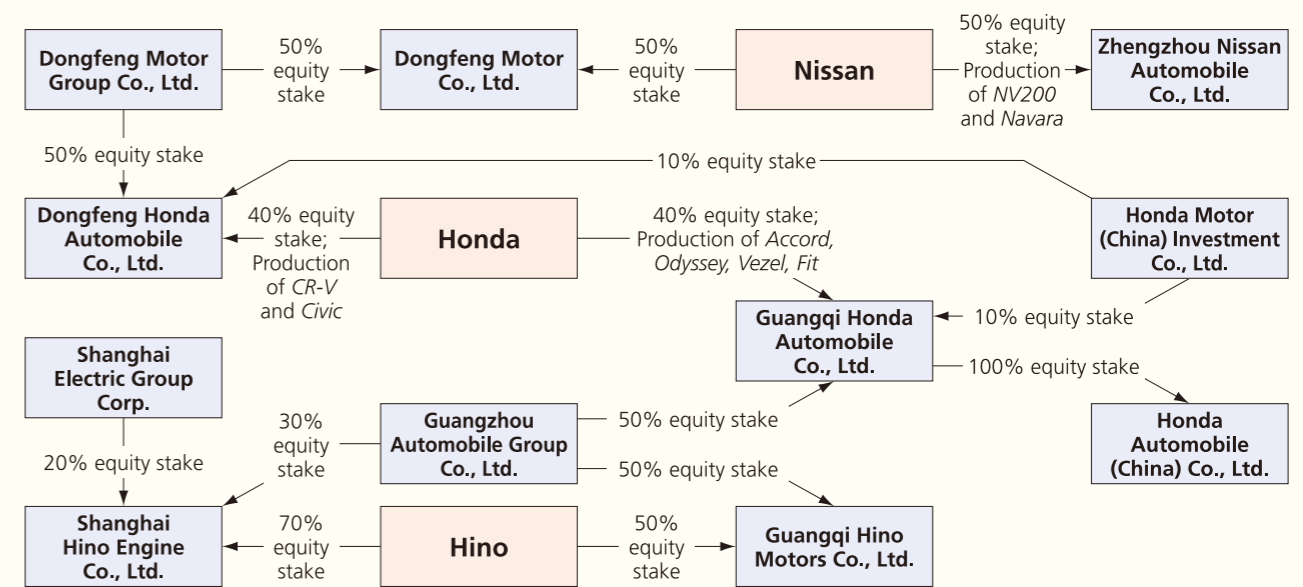
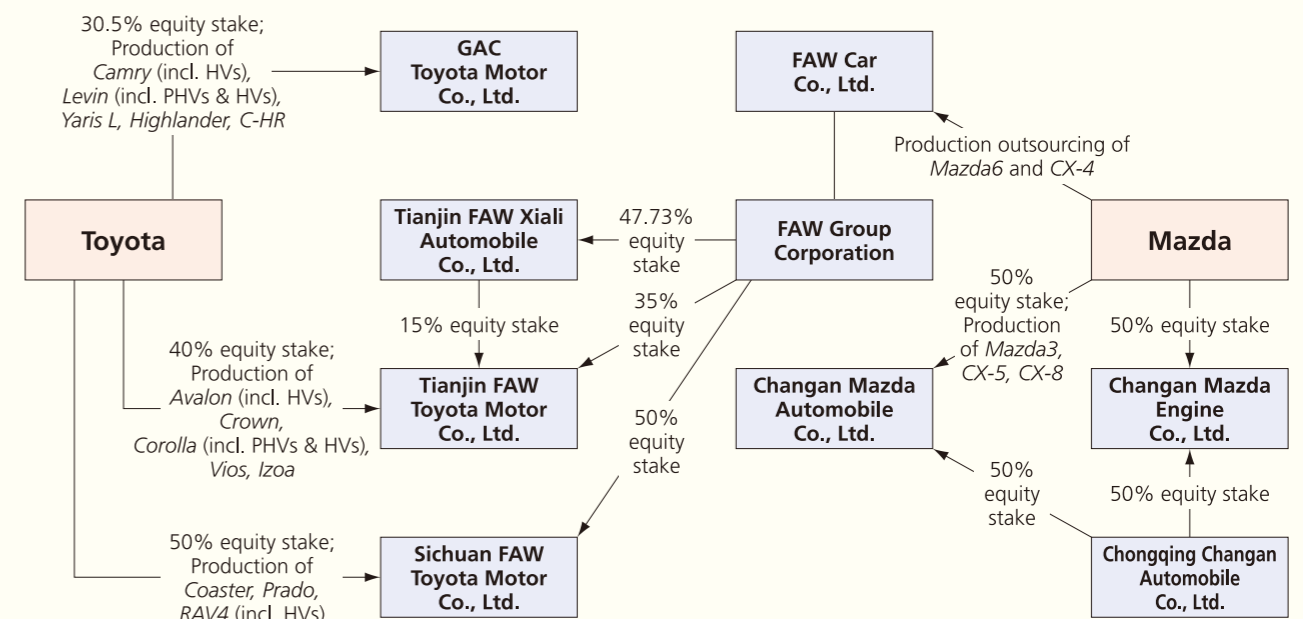
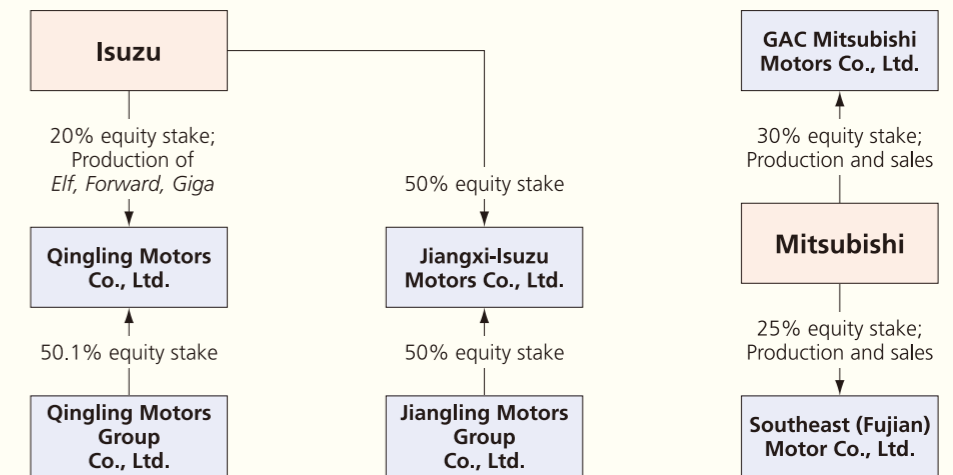
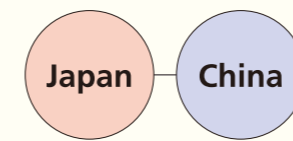
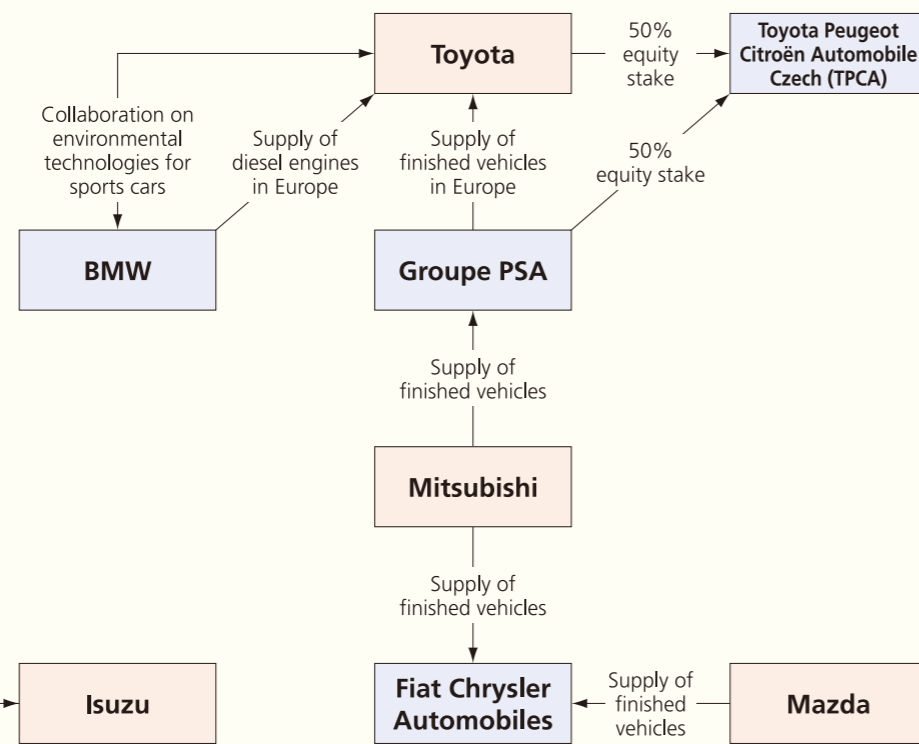
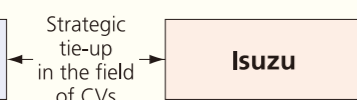
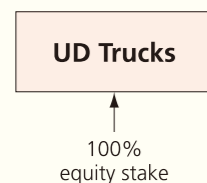
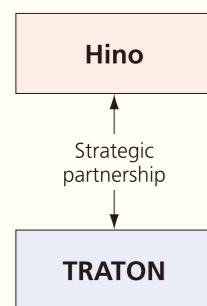
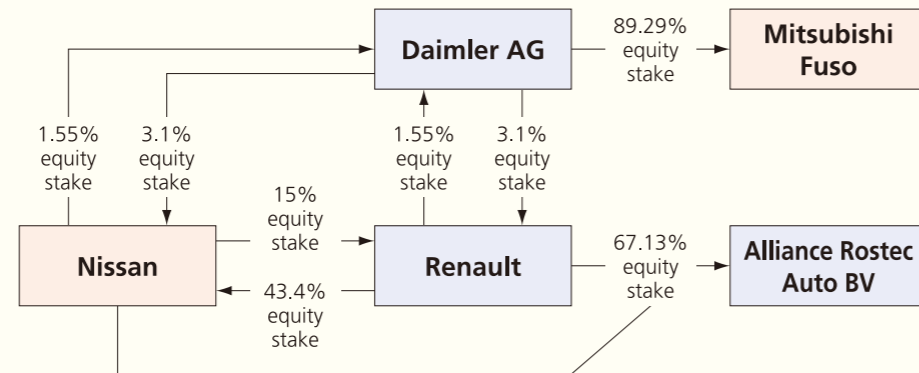
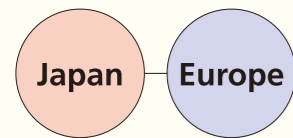
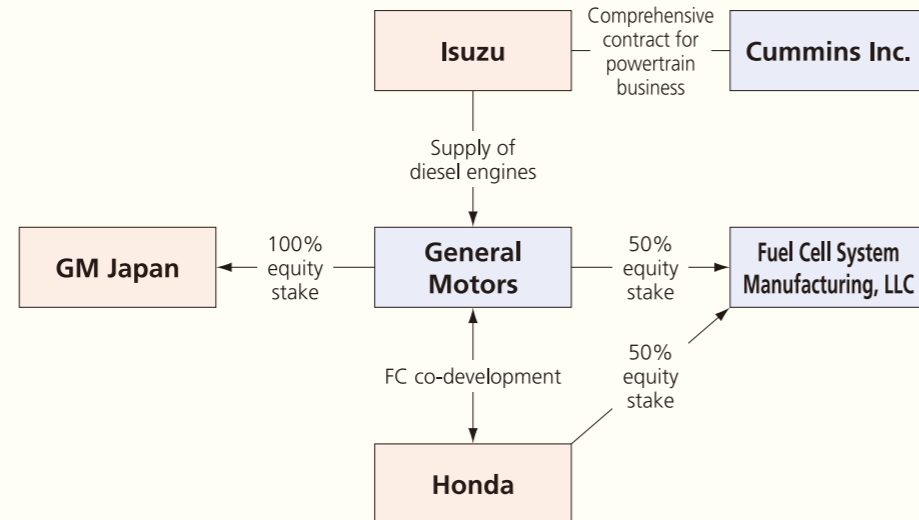
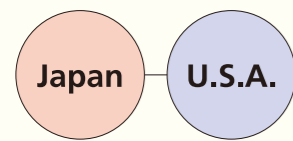
Japanese Automakers Forge Extensive International Alliances

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 among 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, 2020



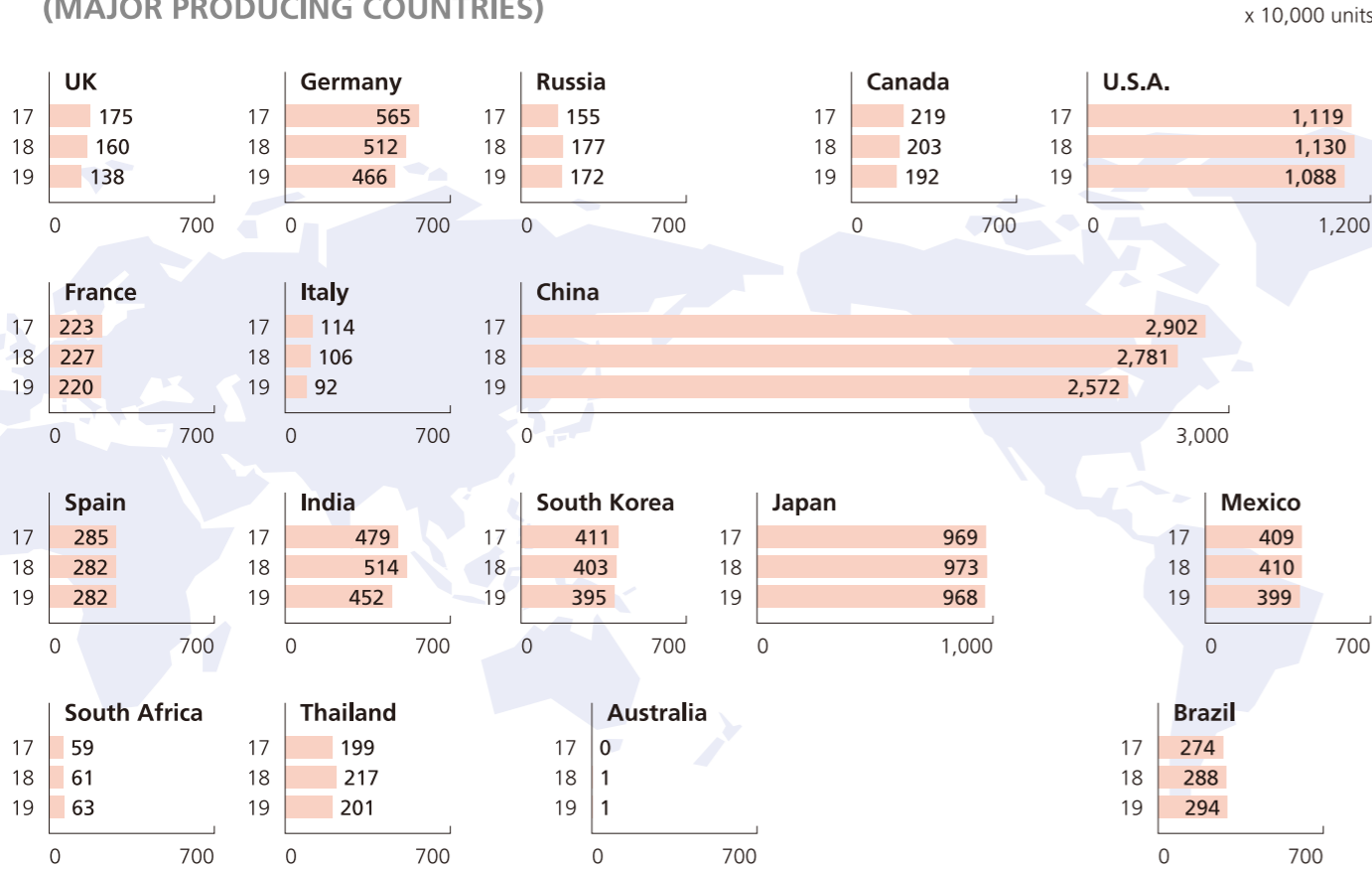
Note: In principle, the tie-ups shown above cover only technical cooperation related to motor vehicle production and exclude sales tie-ups. Source: Japan Automobile Manufacturers Association



# Motor Vehicle Production Worldwide Declines to 91.79 Million Units

In 2019 worldwide motor vehicle production (excluding motorcycles) dropped 5.2% from the previous year to a total of 91.79 million units, although a slight increase in production was seen in Africa (up 0.3% to 1.11 million units).

## MOTOR VEHICLE PRODUCTION EXCLUDING MOTORCYCLES (MAJOR PRODUCING COUNTRIES)



## GLOBAL MOTORCYCLE PRODUCTION (BY COUNTRY/TERRITORY)

Country/Territory	2016			2017			2018		
	Mopeds	Motorcycles	Total	Mopeds	Motorcycles	Total	Mopeds	Motorcycles	Total
Austria	—	—	—	—	—	—	—	—	—
Czech Republic	9	1,219	1,228	—	—	1,331	—	—	1,493
France	—	—	—	—	—	—	—	—	—
Germany	—	—	—	—	—	—	—	—	—
Italy	61,299	241,024	302,323	75,859	249,356	325,215	74,974	254,211	329,185
Spain	—	—	—	—	—	—	—	—	—
UK	—	—	—	—	—	—	—	—	—
Brazil	—	—	887,653	—	—	882,876	—	—	1,036,788
China	—	—	16,820,802	—	—	17,145,746	—	—	15,577,507
India	—	—	19,933,739	—	—	23,154,838	—	—	24,503,086
Japan	0	560,536	560,536	0	646,983	646,983	0	651,884	651,884
Malaysia	—	—	395,938	—	—	440,673	—	—	465,083
Pakistan	—	—	1,496,907	—	—	1,781,856	—	—	1,902,632
Philippines	—	—	1,040,626	—	—	1,173,883	—	—	1,258,566
Taiwan	—	—	1,217,442	—	—	1,237,080	—	—	1,088,657
Thailand	—	—	1,820,358	—	—	2,055,193	—	—	2,063,076

Note: "—" means data is not available at the end of March 2020.

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

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

In vehicle units

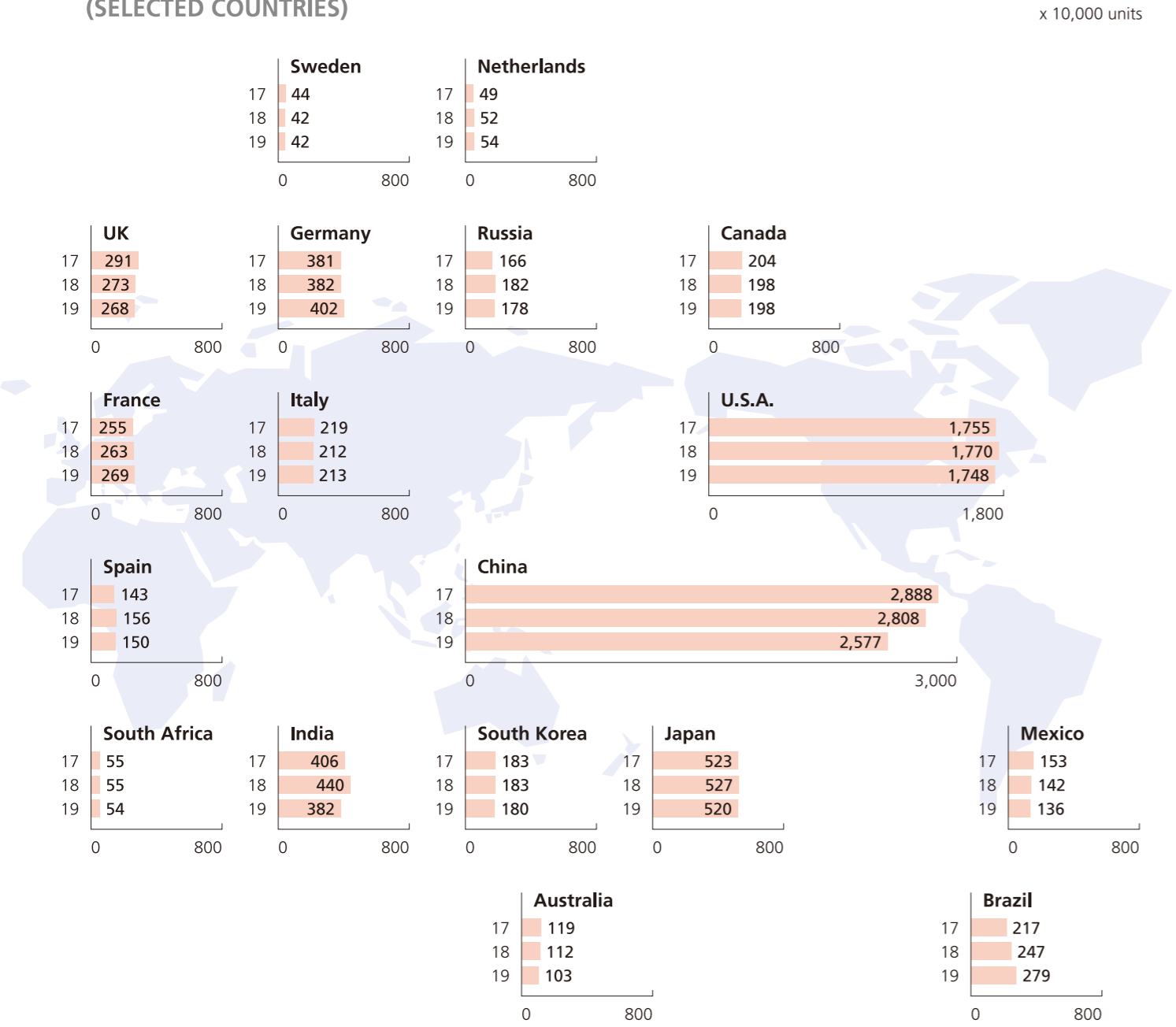
Country/Region/ Territory	2017			2018			2019		
	Passenger Cars	Trucks & Buses	Total	Passenger Cars	Trucks & Buses	Total	Passenger Cars	Trucks & Buses	Total
Austria	78,000	19,200	97,200	144,500	20,400	164,900	158,400	21,000	179,400
Belgium	332,979	44,023	377,002	265,958	42,535	308,493	247,020	38,777	285,797
Finland	108,839	0	108,839	112,000	0	112,000	114,785	0	114,785
France	1,754,200	471,000	2,225,700	1,772,641	495,123	2,267,764	1,675,198	527,262	2,202,460
Germany	5,645,584	0	5,645,584	5,120,409	0	5,120,409	4,661,328	0	4,661,328
Italy	742,642	399,568	1,142,210	673,196	389,136	1,062,332	542,007	373,298	915,305
Netherlands	0	0	0	214,000	0	214,000	176,113	0	176,113
Portugal	126,426	49,118	175,544	234,151	60,239	294,390	282,142	63,562	345,704
Spain	2,291,474	556,843	2,848,317	2,267,396	552,169	2,819,565	2,248,019	574,336	2,822,355
Sweden	0	0	0	291,000	0	291,000	279,000	0	279,000
UK	1,671,166	78,219	1,749,385	1,519,440	84,888	1,604,328	1,303,135	78,270	1,381,405
Czech Republic	1,305,865	0	1,305,865	1,437,396	5,488	1,442,884	1,427,563	6,400	1,433,963
Hungary	418,435	0	418,435	463,000	0	463,000	498,158	0	498,158
Poland	514,700	175,083	689,783	451,600	208,052	659,652	434,700	215,164	649,864
Romania	363,654	34	363,688	476,769	0	476,769	490,412	0	490,412
Slovakia	1,032,445	0	1,032,445	1,093,215	0	1,093,215	1,100,000	0	1,100,000
Slovenia	189,852	0	189,852	209,378	0	209,378	199,102	0	199,102
Double Counts Portugal/World	0	-11,643	-11,643	0	0	0	0	0	0
Double Counts Eastern Europe/World	0	0	0	0	0	0	0	0	0
European Union (EU27*)	16,576,261	1,781,445	18,358,206	16,746,049	1,858,030	18,604,079	15,837,082	1,898,069	17,735,151
Turkey	1,142,906	552,825	1,695,731	1,026,571	523,689	1,550,260	982,642	478,602	1,461,244
Serbia	78,950	174	79,124	56,303	146	56,449	34,985	130	35,115
Russia	1,349,017	202,892	1,551,909	1,563,747	204,799	1,768,546	1,523,594	196,190	1,719,784
Azerbaijan	0	0	0	969	167	1,136	2,360	163	2,523
Belarus	3,580	9,848	13,428	10,941	12,294	23,235	20,420	10,067	30,487
Kazakhstan	16,789	2,282	19,071	30,016	1,529	31,545	44,077	5,323	49,400
Ukraine	7,296	1,290	8,586	5,660	963	6,623	6,254	1,011	7,265
Uzbekistan	140,247	0	140,247	220,667	0	220,667	271,113	0	271,113
Double Counts CIS/World	-116,000	0	-116,000	0	0	0	0	0	0
CIS	1,400,929	216,312	1,617,241	1,832,000	219,752	2,051,752	1,867,818	212,754	2,080,572
Europe	19,083,046	2,550,703	21,634,302	19,660,923	2,601,617	22,262,540	18,722,527	2,589,555	21,312,082
Canada	751,048	1,442,955	2,194,003	655,896	1,369,898	2,025,794	461,370	1,455,215	1,916,585
U.S.A.	3,033,216	8,156,769	11,189,985	2,785,164	8,512,747	11,297,911	2,512,780	8,367,239	10,880,019
North America	3,784,264	9,599,724	13,383,988	3,441,060	9,882,645	13,323,705	2,974,150	9,822,454	12,796,604
Mexico	1,906,899	2,187,933	4,094,832	1,581,012	2,519,758	4,100,770	1,382,714	2,604,080	3,986,794
Argentina	203,694	269,714	473,408	208,573	258,076	466,649	108,364	206,423	314,787
Brazil	2,307,443	429,359	2,736,802	2,387,967	493,051	2,881,018	2,448,490	496,498	2,944,988
Colombia	74,000	3,000	77,000	71,676	3,800	75,476	59,586	0	59,586
Ecuador	0	0	0	0	0	0	0	0	0
Venezuela	0	0	0	0	0	0	0	0	0
Double Counts South America/World	-40,000	-12,000	-52,000	0	0	0	0	0	0
Latin America	4,452,036	2,878,006	7,330,042	4,249,228	3,274,685	7,523,913	3,999,154	3,307,001	7,306,155
North and Latin America	8,236,300	12,477,730	20,714,030	7,690,288	13,157,330	20,847,618	6,973,304	13,129,455	20,102,759
Australia	0	0	0	0	6,371	6,371	0	5,606	5,606
Bangladesh	0	0	0	0	0	0	0	0	0
China	24,806,687	4,208,747	29,015,434	23,529,423	4,279,773	27,809,196	21,360,193	4,360,472	25,720,665
India	3,961,327	830,904	4,792,231	4,032,481	1,110,328	5,142,809	3,623,335	892,682	4,516,017
Indonesia	982,337	235,769	1,218,106	1,055,774	287,940	1,343,714	1,045,666	241,182	1,286,848
Iran	1,418,550	837,849	1,515,396	1,027,000	68,210	1,095,210	770,000	51,060	821,060
Japan	8,347,836	1,342,838	9,690,674	8,359,286	1,370,308	9,729,594	8,328,756	1,355,538	9,684,294
Malaysia	460,000	40,700	501,700	520,526	44,445	564,971	534,115	37,517	571,632
Pakistan	204,500	46,300	250,800	223,481	46,311	269,792	156,623	30,093	186,716
Philippines	0	0	0	0	8,400	8,400	0	8,400	8,400
South Korea	3,735,399	379,514	4,114,913	3,661,730	367,104	4,028,834	3,612,587	338,030	3,950,617
Taiwan	230,356	61,207	291,563	190,052	63,189	253,241	189,549	61,755	251,304
Thailand	818,440	1,170,383	1,988,823	877,015	1,290,679	2,167,694	795,254	1,218,456	2,013,710
Vietnam	145,571	90,590	236,571	146,000	91,000	237,000	250,000	0	250,000
Double Counts Asia/World	-221,000	0	-221,000	0	0	0	0	0	0
Asia-Oceania	44,892,003	9,244,801	53,395,211	43,622,768	9,034,058	52,656,826	40,666,078	8,600,791	49,266,869
Algeria	60,606	0	60,606	70,597	0	70,597	60,012	0	60,012
Egypt	9,500	26,500	36,000	18,500	0	18,500	18,500	0	18,500
Morocco	307,318	34,484	341,802	366,773	35,312	402,085	360,110	34,542	394,652
South Africa	321,358	268,593	589,951	321,097	289,757	610,854	348,665	283,318	631,983
Tunisia	0	1,900	1,900	0	0	0	0	0	0
Double Counts South Africa/World	-27,000	0	-27,000	0	0	0	0	0	0
Africa	671,782	331,477	1,003,259	776,967	325,069	1,102,036	787,287	317,860	1,105,147
Grand Totals	72,883,131	24,604,711	96,746,802	71,750,946	25,118,074	96,869,020	67,149,196	24,637,661	91,786,857

\*"EU27" is as per OICA (see "Sources" below) listings. Notes: 1. Includes preliminary figures. 2. Some EU and Latin American countries do not release truck and bus production data. Sources: International Organization of Motor Vehicle Manufacturers (OICA); for Japan, Japan Automobile Manufacturers Association

# A Total of 91.3 Million New Motor Vehicles Sold Globally

In 2019 new motor vehicle registrations (excluding motorcycles) decreased 4.0% from the previous year to a global total of 91.3 million units. Vehicle sales rose in Brazil (up 12.9% to 2.79 million units), Germany (up 5.1% to 4.02 million units), and Italy (up 0.5% to 2.13 million units).

## NEW REGISTRATIONS OF MOTOR VEHICLES EXCLUDING MOTORCYCLES (SELECTED COUNTRIES)



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

In vehicle units

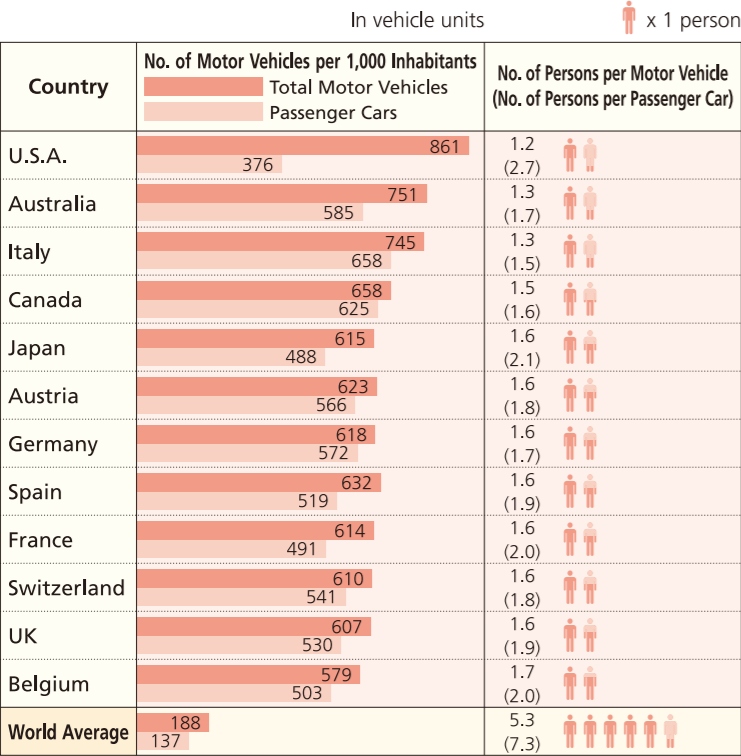
Country	2017			2018			2019		
	Passenger Cars	Commercial Vehicles	Total	Passenger Cars	Commercial Vehicles	Total	Passenger Cars	Commercial Vehicles	Total
Austria	353,320	49,604	402,924	341,068	52,970	394,038	329,363	52,970	382,333
Belgium	546,558	87,084	633,642	549,632	89,812	639,444	550,003	94,038	644,041
Czech Republic	271,595	30,210	301,805	261,437	20,456	281,893	249,915	31,508	281,423
Denmark	221,821	41,775	263,596	218,566	39,435	258,001	225,589	38,667	264,256
Finland	120,480	16,054	136,534	120,480	16,401	136,881	114,199	40,948	155,147
France	2,110,748	438,654	2,549,402	2,173,481	459,140	2,632,621	2,214,279	479,698	2,693,977
Germany	3,441,262	369,146	3,810,408	3,435,778	386,282	3,822,060	3,607,258	409,801	4,017,059
Hungary	116,265	20,200	136,465	136,601	23,053	159,654	157,900	4,759	162,659
Italy	1,970,497	221,263	2,191,760	1,910,025	211,756	2,121,781	1,916,320	215,596	2,131,916
Netherlands	414,306	73,633	487,939	443,531	79,339	522,870	446,114	92,628	538,742
Norway	158,650	43,272	201,922	147,929	38,907	186,836	142,381	47,442	189,823
Poland	486,352	90,945	577,297	531,889	101,395	633,284	555,598	100,667	656,265
Portugal	222,129	38,715	260,844	228,327	39,394	267,721	227,804	44,013	271,817
Romania	105,083	16,898	121,981	129,004	29,274	158,278	161,562	27,463	189,025
Slovakia	96,105	7,584	103,689	98,080	13,785	111,865	101,568	12,295	113,863
Spain	1,234,932	199,661	1,434,593	1,321,438	242,058	1,563,496	1,258,260	243,000	1,501,260
Sweden	379,393	63,443	442,836	353,729	64,361	418,090	356,036	62,442	418,478
UK	2,540,617	369,788	2,910,405	2,367,147	367,129	2,734,276	2,311,140	365,778	2,676,918
Russia	1,448,700	208,870	1,657,570	1,606,676	214,644	1,821,320	1,567,743	211,098	1,778,841
Switzerland	311,996	36,890	348,886	299,135	37,505	336,640	311,466	44,573	356,039
Turkey	722,759	257,518	980,277	486,321	155,220	641,541	387,256	104,653	491,909
Canada	639,824	1,398,975	2,038,799	577,711	1,407,281	1,984,992	496,603	1,479,252	1,975,855
U.S.A.	6,080,229	11,470,292	17,550,521	5,303,580	12,397,822	17,701,402	4,715,005	12,764,999	17,480,004
Mexico	984,262	546,236	1,530,498	883,043	538,415	1,421,458	761,720	597,951	1,359,671
Brazil	1,856,450	316,288	2,172,738	2,101,884	366,550	2,468,434	2,262,069	525,781	2,787,850
Argentina	663,550	198,782	862,332	610,943	162,698	773,641	282,299	126,375	408,674
China	24,718,321	4,160,583	28,878,904	23,709,782	4,370,795	28,080,577	21,444,180	4,324,497	25,768,677
India	3,229,109	830,346	4,059,455	3,394,756	1,005,380	4,400,136	2,962,052	854,839	3,816,891
Japan	4,386,377	847,788	5,234,165	4,391,160	880,907	5,272,067	4,301,091	894,125	5,195,216
South Korea	1,526,660	303,328	1,829,988	1,525,150	301,991	1,827,141	1,539,060	256,074	1,795,134
Malaysia	514,680	61,956	576,636	533,201	65,513	598,714	550,179	54,108	604,287
Indonesia	833,681	235,993	1,069,674	878,595	274,194	1,152,789	798,813	244,204	1,043,017
Thailand	665,871	340,191	1,006,062	729,709	357,220	1,086,929	468,638	538,914	1,007,552
Australia	915,658	273,458	1,189,116	873,713	247,683	1,121,396	799,263	235,116	1,034,379
Egypt	100,533	28,408	128,941	145,873	38,583	184,456	126,431	43,569	170,000
South Africa	361,289	186,117	547,406	365,242	186,984	552,226	355,378	181,233	536,611
Other	5,944,772	1,085,824	7,030,596	5,505,852	1,081,138	6,586,989	5,287,158	1,109,971	6,397,129
Grand Totals	70,694,834	24,965,772	95,660,606	68,690,468	26,365,470	95,055,937	64,341,693	26,955,045	91,296,738

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

More than 1.43 Billion Motor Vehicles in Use Worldwide

There were over 1.43 billion motor vehicles (excluding motorcycles) in use worldwide in 2018, equivalent to 188 motor vehicles per 1,000 inhabitants or one vehicle for every 5.3 persons. Motorcycle density in recent years has been particularly high in Indonesia, with one motorcycle in use for every two persons; in Malaysia and Thailand, with one 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 12 persons.

MOTOR VEHICLE DENSITY: INTERNATIONAL COMPARISONS (at end of 2018)



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

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



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

MOTOR VEHICLES IN USE WORLDWIDE (at end of 2018)

In vehicle units

Country	Passenger Cars	Commercial Vehicles	Total
Germany	47,095,784	3,751,843	50,847,627
Italy	39,018,170	5,150,556	44,168,726
France	32,034,000	8,011,000	40,045,000
UK	35,271,700	5,140,900	40,412,600
Spain	24,074,151	5,271,758	29,345,909
Netherlands	8,787,283	1,164,249	9,951,532
Belgium	5,782,684	881,108	6,663,792
Austria	4,978,852	505,268	5,484,120
Sweden	4,870,783	684,645	5,555,428
Poland	23,540,800	4,057,800	27,598,600
Switzerland	4,602,688	578,476	5,181,164
Turkey	12,398,190	5,370,451	17,768,641
Russia	49,753,500	8,670,800	58,424,300
U.S.A.	122,828,000	158,671,000	281,499,000
Canada	23,137,203	1,193,569	24,330,772
Mexico	31,523,460	11,676,201	43,199,661
Argentina	10,902,900	3,505,800	14,408,700
Brazil	36,880,447	7,558,807	44,439,254
Japan	62,025,916	16,263,521	78,289,437
China	194,395,031	36,824,969	231,220,000
South Korea	18,676,924	4,525,631	23,202,555
India	31,889,200	24,576,900	56,466,100
Thailand	9,884,083	7,900,087	17,784,170
Indonesia	16,548,871	10,320,948	26,869,819
Australia	14,504,148	4,130,988	18,635,136
South Africa	8,838,400	4,165,900	13,004,300
Other	168,031,030	50,355,065	218,386,095
Grand Totals	1,042,274,198	390,908,240	1,433,182,438

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

MOTORCYCLES IN USE WORLDWIDE

In vehicle units

Year	Country/Territory	Total
2018	Italy	8,720,733
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
2018	Germany	6,183,690
2014	Greece	1,802,929
2014	Malaysia	11,734,527
2015	Thailand	20,541,724
2018	Taiwan	13,835,520
2018	Indonesia	119,413,901
2018	China	68,227,847
2018	Japan	10,730,337
2018	Philippines	7,101,194

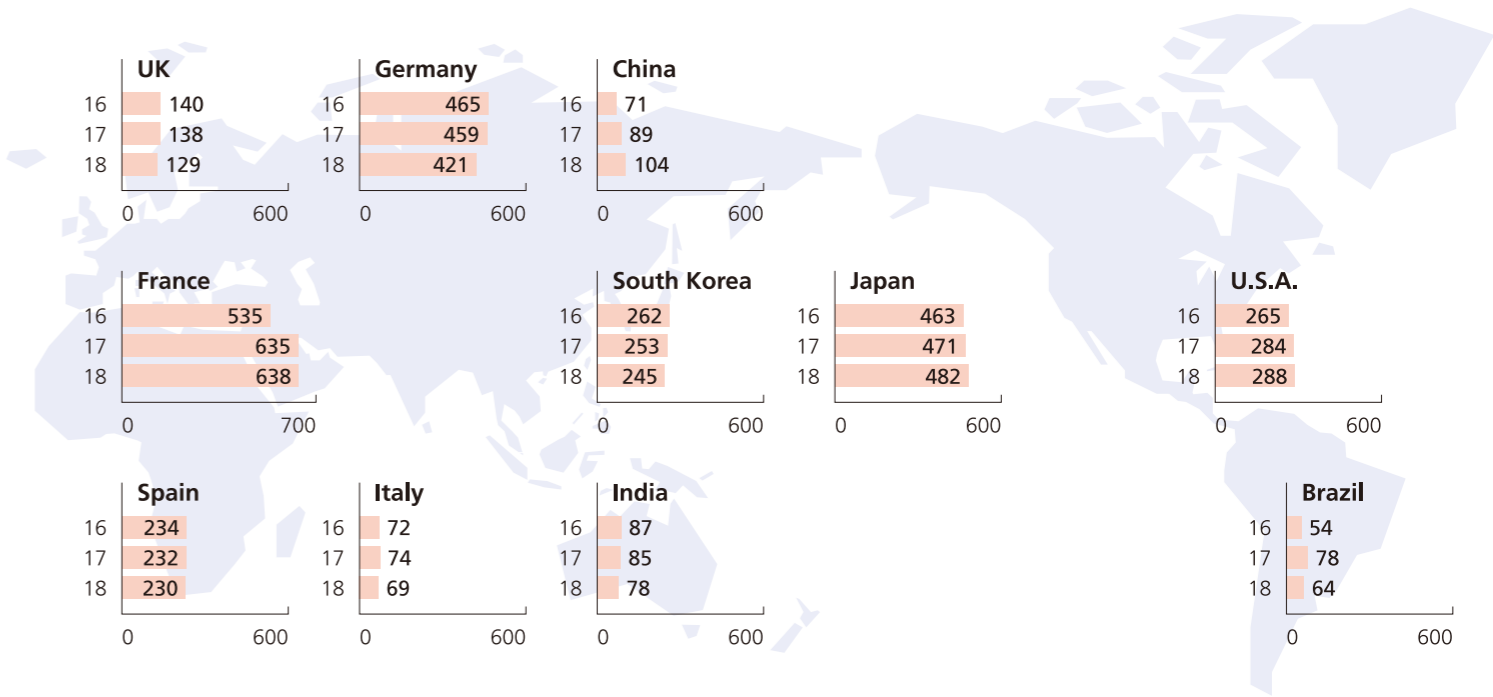
Sources: Ministry of Land, Infrastructure, Transport and Tourism; Ministry of Internal Affairs and Communications; Federation of Asian Motorcycle Industries (FAMI); European Association of Motorcycle Manufacturers (ACEM), etc.

Motor Vehicle Exports Increase in China, Japan, and the U.S.A.

Motor vehicle exports (excluding motorcycles) in 2018 increased over the previous year in China (up 16.8% to 1.04 million units), Japan (up 2.4% to 4.82 million units), and the United States (up 1.4% to 2.88 million units).

MOTOR VEHICLE EXPORTS (MAJOR EXPORTING COUNTRIES)

x 10,000 units



MOTOR VEHICLE EXPORTS (MAJOR EXPORTING COUNTRIES)

In vehicle units

Country	2016			2017			2018		
	Passenger Cars	Commercial Vehicles	Total	Passenger Cars	Commercial Vehicles	Total	Passenger Cars	Commercial Vehicles	Total
Japan	4,118,432	515,601	4,634,033	4,218,429	487,419	4,705,848	4,357,782	459,688	4,817,470
U.S.A.	2,114,606	539,082	2,653,688	2,221,875	617,586	2,839,461	2,344,811	535,340	2,880,151
Germany	4,411,152	239,901	4,651,053	4,378,108	210,417	4,588,525	3,992,724	219,381	4,212,105
UK	1,349,443	54,842	1,404,285	1,334,538	48,899	1,383,437	1,237,608	50,320	1,287,928
France	4,735,057	617,832	5,352,889	5,695,129	658,225	6,353,354	5,303,355	1,073,039	6,376,394
Italy	398,277	318,045	716,322	418,324	324,094	742,418	376,365	316,785	693,150
Spain	1,923,102	421,153	2,344,255	1,866,931	451,286	2,318,217	1,873,085	431,333	2,304,418
Brazil	409,251	128,175	537,426	625,186	159,563	784,749	501,124	142,297	643,421
South Korea	2,506,505	115,210	2,621,715	2,415,948	114,246	2,530,194	2,342,292	107,359	2,449,651
China	477,088	231,173	708,261	639,167	251,730	890,897	757,525	283,188	1,040,713
India	758,727	108,271	866,998	748,366	96,865	845,231	676,193	99,931	776,124

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

MOTORCYCLE EXPORTS (MAJOR EXPORTING COUNTRIES/TERRITORY)

In vehicle units

Country/Territory	2016 Total	2017 Total	2018 Total
Japan	428,619	463,123	456,758
China	6,657,949	7,143,732	6,958,643
Taiwan	427,392	337,490	333,769
Indonesia	284,065	431,187	627,421
India	2,340,277	2,815,003	3,280,841

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

Automobile Customs Tariffs, EPAs-FTAs

After repeated reductions in tariff rates, import tariffs in Japan on finished motor vehicles and auto parts were abolished in 1978. Many other countries continue to impose tariffs on imported vehicles: for example, the United States imposes a 25% tariff on imported trucks and China levies a 15% tariff on finished vehicles. Aiming to abolish customs tariffs and thereby to liberalize and facilitate trade and investment, the Japanese government promotes the establishment of economic partnership agreements (EPAs) and free trade agreements (FTAs). In recent years, Japan has signed several multilateral trade accords including the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) with ten countries and the Japan-European Union EPA, thereby significantly expanding the scope of its international trade agreements.

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

As of May 2020

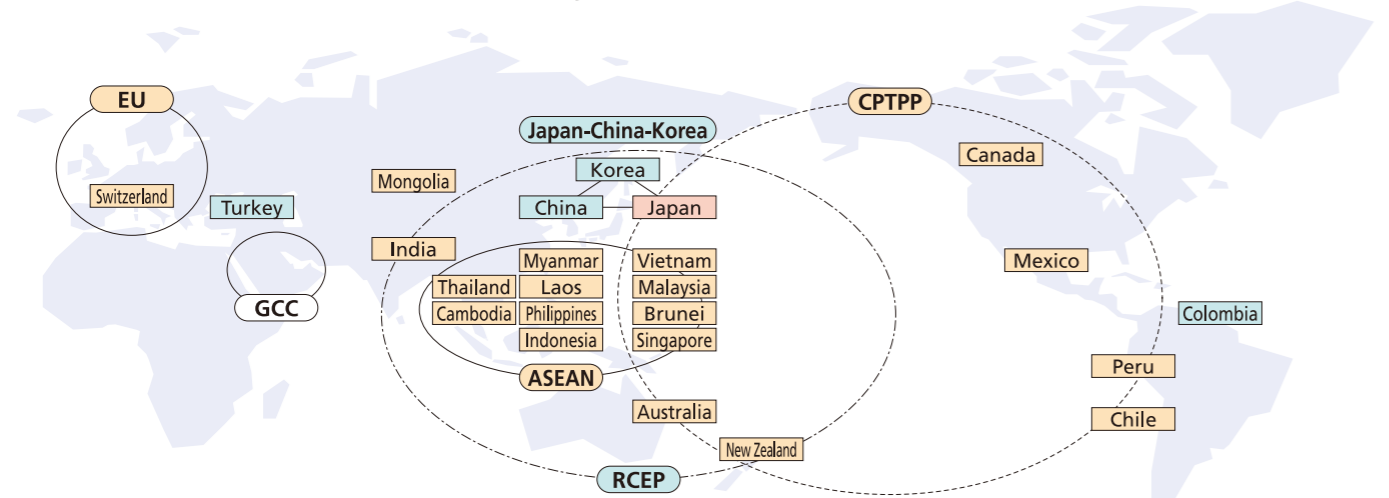
	Passenger Cars	Trucks	Buses	Auto Parts, Etc. (including vehicle bodies)
Japan	None	None	None	None
U.S.A.	2.5%	25% Cab chassis, from 5t up to 20t in GVW: 4%	2%	2.5%
China	15%	15%	15%	6%

Source: Japan Automobile Manufacturers Association

● STATUS OF JAPAN'S ENGAGEMENT IN EPAs/FTAs

■ EPA/FTA in force ■ EPA/FTA under negotiation/other

As of February 2020



Notes: 1. Japan-ASEAN EPA investment services negotiations have been substantively concluded. 2. Negotiations are postponed/suspended with GCC, Korea, and Canada. Source: Ministry of Foreign Affairs

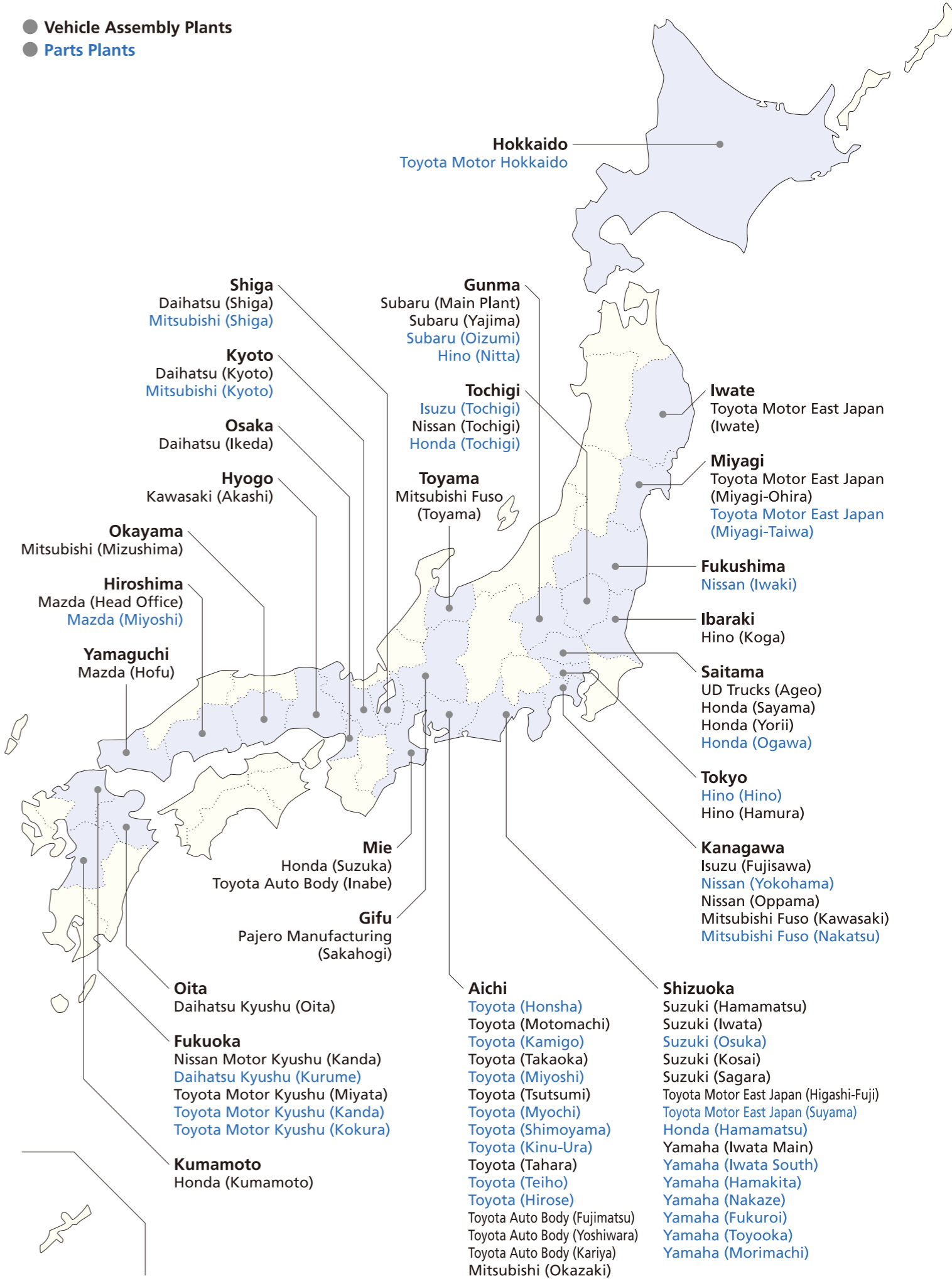
● AUTOMOBILE CUSTOMS TARIFFS under the Japan-EU EPA and CPTPP

	Passenger Cars	Trucks	Buses	Auto Parts, Etc. (including vehicle bodies)
Japan-EU EPA (in effect as of Feb. 2019)	[10%] To be abolished in 8 years.	Gasoline trucks≥2800cc, Diesel trucks≥2500cc: [22%] Gasoline trucks<2800cc, Diesel trucks<2500cc: [10%] To be abolished in 8 years.	Gasoline buses≥2800cc, Diesel buses≥2500cc: [16%] Gasoline buses<2800cc, Diesel buses<2500cc: [10%] To be abolished in 13 years.	[3-4.5%] Immediately abolished for more than 90% (in value terms).
CPTPP (in effect as of Dec. 2018)	Example: Canada [6.1%] To be abolished in 5 years.	[6.1%] Large-sized gasoline trucks: To be abolished in 6 years. Other trucks: To be abolished in 11 years.	[6.1%] To be abolished in 11 years.	[6.0%] Immediately abolished for 87.5% (in value terms).
	Example: Vietnam [77%] Over 3000cc: To be abolished in 10 years. 3000cc or under: To be abolished in 13 years.	[20-70%] To be abolished in 12-13 years.	[5%] To be abolished in 13 years.	[3-30%] Immediately abolished, or to be abolished within 11 years depending on the product, for tires, vehicle bodies, parts, and accessories.

Note: Figures in brackets represent tariff rates imposed prior to reduction/abolition.






Source: Japan Automobile Manufacturers Association

- Vehicle Assembly Plants
- Parts Plants



	<p><b>Daihatsu Motor Co., Ltd.</b></p> <p>Head Office : 1-1 Daihatsu-cho, Ikeda, Osaka 563-8651 Tel: (072) 751-8811 Tokyo Branch Office : 2-10 Nihonbashi Honcho 2-chome, Chuo-ku, Tokyo 103-0023 <a href="http://www.daihatsu.co.jp/">http://www.daihatsu.co.jp/</a> <a href="http://www.daihatsu.com">http://www.daihatsu.com</a></p>
	<p><b>HINO Motors, Ltd.</b></p> <p>Head Office : 1-1 Hinodai 3-chome, Hino, Tokyo 191-8660 Tel: (042) 586-5111 <a href="http://www.hino-global.com">http://www.hino-global.com</a></p>
	<p><b>HONDA MOTOR CO., LTD.</b></p> <p>Head Office : 1-1 Minami-Aoyama 2-chome, Minato-ku, Tokyo 107-8556 Tel: (03) 3423-1111 <a href="https://www.honda.co.jp/">https://www.honda.co.jp/</a></p>
	<p><b>Isuzu Motors Limited</b></p> <p>Head Office : 26-1 Minami-Oi 6-chome, Shinagawa-ku, Tokyo 140-8722 Tel: (03) 5471-1141 <a href="http://www.isuzu.co.jp/world/">http://www.isuzu.co.jp/world/</a></p>
	<p><b>Kawasaki Heavy Industries, Ltd.</b></p> <p>Kobe Head Office : Kobe Crystal Tower, 1-3 Higashi Kawasaki-cho 1-chome, Chuo-ku, Kobe, Hyogo 650-8680 Tel: (078) 371-9530 Tokyo Head Office : 14-5 Kaigan 1-chome, Minato-ku, Tokyo 105-8315 Tel: (03) 3435-2111 <a href="http://www.khi.co.jp/">http://www.khi.co.jp/</a></p>
	<p><b>MAZDA MOTOR CORPORATION</b></p> <p>Head Office : 3-1 Shinchij, Fuchu-cho, Aki-gun, Hiroshima 730-8670 Tel: (082) 282-1111 Tokyo Head Office : Kasumigaseki Building, 25th Floor, 3-2-5 Kasumigaseki, Chiyoda-ku, Tokyo 100-6025 <a href="http://www.mazda.co.jp/">http://www.mazda.co.jp/</a> <a href="http://www.mazda.com/">http://www.mazda.com/</a></p>
	<p><b>MITSUBISHI MOTORS CORPORATION</b></p> <p>Head Office : 1-21 Shibaura 3-chome, Minato-ku, Tokyo 108-8410 Tel: (03) 3456-1111 <a href="https://www.mitsubishi-motors.co.jp/">https://www.mitsubishi-motors.co.jp/</a> <a href="https://www.mitsubishi-motors.com/en/">https://www.mitsubishi-motors.com/en/</a></p>
	<p><b>Mitsubishi Fuso Truck and Bus Corporation</b></p> <p>Head Office : 10 Ohkura-cho, Nakahara-ku, Kawasaki, Kanagawa 211-8522 Tel: (044) 330-7700 <a href="http://www.mitsubishi-fuso.com/">http://www.mitsubishi-fuso.com/</a></p>

Note: Manufacturers are listed in alphabetical order.

<p><b>NISSAN MOTOR CORPORATION</b></p> 	<p><b>Nissan Motor Co., Ltd.</b></p> <p>Global Headquarters : 1-1 Takashima 1-chome, Nishi-ku, Yokohama-shi, Kanagawa 220-8686 Tel: (045) 523-5523 <a href="http://www.nissan.co.jp/">http://www.nissan.co.jp/</a> <a href="http://www.nissan-global.com/EN/">http://www.nissan-global.com/EN/</a></p>
	<p><b>Subaru Corporation</b></p> <p>Head Office : Ebisu Subaru Bldg., 20-8 Ebisu 1-chome, Shibuya-ku, Tokyo 150-8554 Tel: (03) 6447-8000 <a href="https://www.subaru.co.jp/">https://www.subaru.co.jp/</a></p>
	<p><b>Suzuki Motor Corporation</b></p> <p>Head Office : 300 Takatsuka-cho, Minami-ku, Hamamatsu, Shizuoka 432-8611 Tel: (053) 440-2061 Tokyo Branch Office : Suzuki Bldg., Higashi-Shimbashi 2F, 2-8 Higashi-Shimbashi 2-chome, Minato-ku, Tokyo 105-0021 Tel: (03) 5425-2158 <a href="https://www.suzuki.co.jp/">https://www.suzuki.co.jp/</a> <a href="https://www.globalsuzuki.com/">https://www.globalsuzuki.com/</a></p>
	<p><b>TOYOTA MOTOR CORPORATION</b></p> <p>Head Office : 1 Toyota-cho, Toyota, Aichi 471-8571 Tel: (0565) 28-2121 Tokyo Head Office : 4-18 Koraku 1-chome, Bunkyo-ku, Tokyo 112-8701 Tel: (03) 3817-7111 Nagoya Office : 7-1 Meieki 4-chome, Nakamura-ku, Nagoya, Aichi 450-8711 Tel: (052) 552-2111 <a href="https://global.toyota/en">https://global.toyota/en</a></p>
	<p><b>UD Trucks Corporation</b></p> <p>Head Office : 1-1 Ageo, Saitama 362-8523 Tel: (0120) 67-2301 <a href="https://www.udtrucks.com/ja-jp/home">https://www.udtrucks.com/ja-jp/home</a> <a href="https://www.udtrucks.com/">https://www.udtrucks.com/</a></p>
	<p><b>YAMAHA MOTOR CO., Ltd.</b></p> <p>Head Office : 2500 Shingai, Iwata, Shizuoka 438-8501 Tel: (0538) 32-1115 Tokyo Office : Marunouchi My Plaza 15F, 1-1 Marunouchi 2-chome, Chiyoda-ku, Tokyo 100-0005 Tel: (03) 5220-7200 <a href="http://global.yamaha-motor.com/">http://global.yamaha-motor.com/</a></p>
<p><b>Former Member &amp; Friend of JAMA:</b></p>	
	<p><b>General Motors Japan Ltd.</b></p> <p>Head Office : 12-8 Higashi-Shinagawa 4-chome, Shinagawa-ku, Tokyo 140-8687 Tel: (03) 6711-5600 <a href="http://www.gmjapan.co.jp/">http://www.gmjapan.co.jp/</a></p>

- Japan Auto Parts Industries Association (JAPIA)

16-15, Takanawa 1-chome, Minato-ku, Tokyo 108-0074 (03) 3445-4211
- Japan Auto-Body Industries Association Inc. (JABIA)

1-30, Shiba-Daimon 1-chome, Minato-ku, Tokyo 105-0012 (03) 3578-1681
- Japan Automotive Machinery and Tool Manufacturers Association (JAMTA)

5-8, Shiba-Koen 3-chome, Minato-ku, Tokyo 105-0011 (03) 3431-3773
- Society of Automotive Engineers of Japan, Inc. (JSAE)

10-2, Goban-cho, Chiyoda-ku, Tokyo 102-0076 (03) 3262-8211
- Japan Automobile Research Institute (JARI) [Tsukuba]

2530, Karima, Tsukuba, Ibaraki 305-0822 (029) 856-1112
- Japan Automobile Research Institute (JARI) [Tokyo]

1-30, Shiba-Daimon 1-chome, Minato-ku, Tokyo 105-0012 (03) 5733-7921
- Automotive Dispute Resolution Center (ADR)

2-3, Uchisaiwaicho 2-chome, Chiyoda-ku, Tokyo 100-0011 (0120) 028-222
- Japan Automobile Recycling Promotion Center (JARC)

1-30, Shiba-Daimon 1-chome, Minato-ku, Tokyo 105-0012 (03) 5733-8300
- Japan Auto Recycling Partnership (JARP)

1-30, Shiba-Daimon 1-chome, Minato-ku, Tokyo 105-0012 (03) 5405-6150
- Automobile Inspection & Registration Information Association (AIRIA)

11-6, Iwamoto-cho 3-chome, Chiyoda-ku, Tokyo 101-0032 (03) 5825-3671
- Automobile Business Association of Japan

1-30, Shiba-Daimon 1-chome, Minato-ku, Tokyo 105-0012 (03) 3578-3880
- Japan Automobile Dealers Association (JADA)

1-30, Shiba-Daimon 1-chome, Minato-ku, Tokyo 105-8530 (03) 5733-3100
- Japan Light Motor Vehicle and Motorcycle Association

1-30, Shiba-Daimon 1-chome, Minato-ku, Tokyo 105-0012 (03) 5472-7861
- Japan Used Car Dealers Association

25-3, Yoyogi 3-chome, Shibuya-ku, Tokyo 151-0053 (03) 5333-5881
- Japan Automobile Importers Association (JAIA)

1-15, Shiba 3-chome, Minato-ku, Tokyo 105-0014 (03) 5765-6811
- Japan Automobile Federation (JAF)

1-30, Shiba-Daimon 1-chome, Minato-ku, Tokyo 105-0012 (03) 3436-2811
- Japan Auto Appraisal Institute (JAAI)

34-4, Nishi-Shinbashi 2-chome, Minato-ku, Tokyo 105-0003 (03) 5776-0901
- Automobile Fair Trade Council (AFTC)

11-30, Nagata-cho 1-chome, Chiyoda-ku, Tokyo 100-0014 (03) 5511-2111
- Japan Automobile Service Promotion Association (JASPA)

10-1, Roppongi 6-chome, Minato-ku, Tokyo 106-6117 (03) 3404-6141
- Japan Automotive Leasing Association (JALA)

23-1, Shiba 2-chome, Minato-ku, Tokyo 105-0014 (03) 5484-7037
- Motorcycle Federation of Japan (MFJ)

11-6, Tsukiji 3-chome, Chuo-ku, Tokyo 104-0045 (03) 5565-0900

- Japan Motorcycle Promotion & Safety Association

25-15, Minami-Otsuka 2-chome, Toshima-ku, Tokyo 170-0005 (03) 6902-8190
- Japan Automobile Education Foundation (JAEF)

1-30, Shiba-Daimon 1-chome, Minato-ku, Tokyo 105-0012 (03) 5733-3841
- The General Insurance Association of Japan (GIAJ)

9, Kanda-Awajicho 2-chome, Chiyoda-ku, Tokyo 101-8335 (03) 3255-1844
- Institute for Traffic Accident Research and Data Analysis (ITARDA)

7-8, Sarugaku-cho 2-chome, Chiyoda-ku, Tokyo 101-0064 (03) 5577-3977
- Japan Automobile Transport Technology Association (JATA)

2-5, Yotsuya 3-chome, Shinjuku-ku, Tokyo 160-0004 (03) 6836-1201
- Japan Automobile Standards Internationalization Center (JASIC)

2-5, Yotsuya 3-chome, Shinjuku-ku, Tokyo 160-0004 (03) 5362-7751
- ITS Japan

6-8, Shiba-Koen 2-chome, Minato-ku, Tokyo 105-0011 (03) 5777-1011
- Japan Industrial Vehicles Association (JIVA)

5-26, Moto-Akasaka 1-chome, Minato-ku, Tokyo 107-0051 (03) 3403-5556
- Japan Trucking Association

2-5, Yotsuya 3-chome, Shinjuku-ku, Tokyo 160-0004 (03) 3354-1009
- Nihon Bus Association (NBA)

4-1, Marunouchi 3-chome, Chiyoda-ku, Tokyo 100-0005 (03) 3216-4011
- All Japan Railway-Freight Forwarders Association

21, Kanda-Awajicho 2-chome, Chiyoda-ku, Tokyo 101-0063 (03) 5296-1670
- Japan Federation of Hire-Taxi Associations

8-13, Kudan-Minami 4-chome, Chiyoda-ku, Tokyo 102-0074 (03) 3239-1531
- All Japan Rent-A-Car Association

1-30, Shiba-Daimon 1-chome, Minato-ku, Tokyo 105-0012 (03) 5472-7328
- Japan Federation of Authorized Drivers School Associations

3-9, Kudan-Minami 2-chome, Chiyoda-ku, Tokyo 102-0074 (03) 3556-0070
- Japan Automobile Tyre Manufacturers Association, Inc. (JATMA)

8-21, Toranomon 3-chome, Minato-ku, Tokyo 105-0001 (03) 3435-9091
- Auto-Parts & Accessories Retail Association (APARA)

1-7, Shiba 5-chome, Minato-ku, Tokyo 108-0014 (03) 3454-1427
- Japan Traffic Safety Association

8-13, Kudan-Minami 4-chome, Chiyoda-ku, Tokyo 102-0074 (03) 3264-2641
- The Japan Research Center for Transport Policy

12-6, Kudan-Kita 1-chome, Chiyoda-ku, Tokyo 102-0073 (03) 3263-1945
- Japan Road Association (JARA)

3-1, Kasumigaseki 3-chome, Chiyoda-ku, Tokyo 100-8955 (03) 3581-2211
- Express Highway Research Foundation of Japan (EHRF)

11-10, Minami-Azabu 2-chome, Minato-ku, Tokyo 106-0047 (03) 6436-2100
- Vehicle Information and Communication System Center (VICS)

5-7, Kyobashi 2-chome, Chuo-ku, Tokyo 104-0031 (03) 3562-1720

# JAMA

## THE MOTOR INDUSTRY OF JAPAN 2020 Published August 2020

**Japan Automobile Manufacturers Association, Inc.**

Jidosha Kaikan, 1-30, Shiba Daimon 1-chome, Minato-ku, Tokyo 105-0012 Japan

For inquiries about this booklet, write or telephone:

Public Relations Office, JAMA Tel: +81 (3) 5405-6179

<http://www.jama.or.jp/>



©JAMA. All rights reserved. Printed with vegetable oil ink.