

Japan Automobile Manufacturers Association, Inc.

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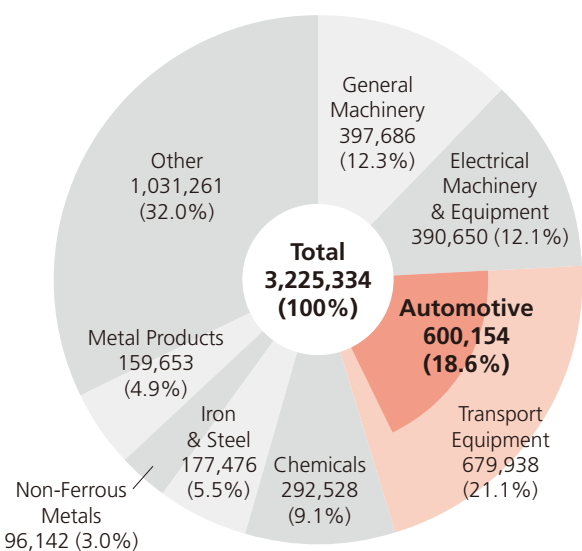
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Automotive Shipments Total 60 Trillion Yen; Equipment Investments, 1.4 Trillion Yen; R&D Expenditures, 3.1 Trillion Yen

Automotive shipments (both domestic and export shipments, including motorcycles, auto parts, etc.) in value terms reached 60 trillion yen in 2019, down 3.7% from the previous year, accounting for 18.6% of the total value of Japan's manufacturing shipments and 40.9% of the value of the machinery industries' combined shipments. Investments in equipment by the automobile industry in 2019 totalled 1.4 trillion yen and its research and development expenditures stood at 3.1 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 12.8 trillion yen in 2020 and auto-related employment in Japan totalling 5.49 million people, the automotive industry is one of the Japanese economy's core industrial sectors.

SHIPMENTS OF MAJOR MANUFACTURING SECTORS IN VALUE TERMS (2019)

x 100 million yen

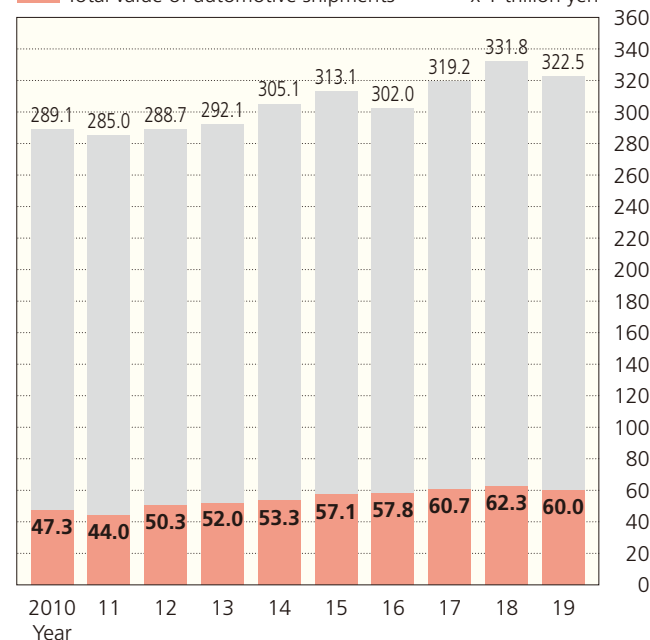


Breakdown of automotive shipments:

- Automobiles (including motorcycles) 242,902
- Auto bodies and trailers 7,260
- Automotive parts and accessories 349,991

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

Total value of all manufacturing shipments
Total value of automotive shipments



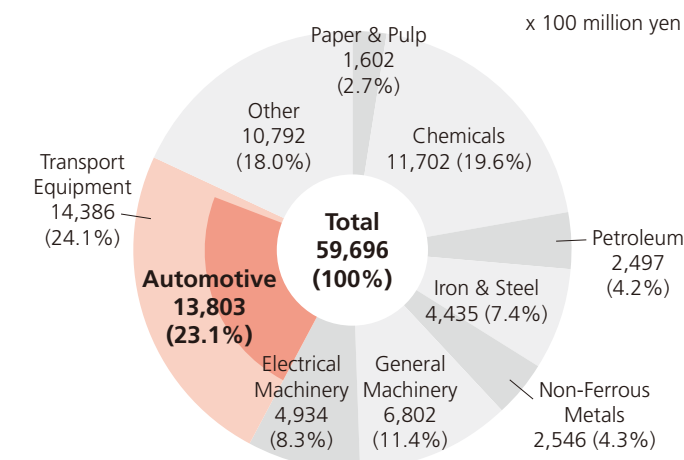
SHIPMENTS OF MAJOR MANUFACTURING SECTORS IN VALUE TERMS, 1970-2019

x 100 million yen

Year	Chemicals	Iron & Steel	Non-Ferrous Metals	Metal Products	Machinery Industries					Other	Total	Automotive Shipments	
					General Machinery	Electrical Machinery & Equipment	Transport Equipment		Subtotal			As % of Value of Machinery Shipments	As % of Total Value of Manufacturing Shipments
								Automotive					
1970	55,402	65,648	30,547	37,277	68,028	73,305	72,758	54,673	223,008	287,383	690,348	24.5	7.9
1975	104,381	113,063	39,087	65,731	106,112	108,213	147,935	105,241	379,551	589,807	1,274,329	27.7	8.3
1980	179,787	178,956	81,186	106,465	175,998	222,346	249,536	212,346	682,457	952,724	2,146,998	31.1	9.9
1985	205,524	177,543	63,836	130,944	241,904	408,422	361,793	276,927	1,055,932	1,063,240	2,653,206	26.2	10.4
1990	235,030	182,687	78,217	185,736	332,249	545,286	468,582	423,106	1,397,439	1,205,939	3,233,726	30.3	13.1
1995	233,625	140,727	64,964	176,465	298,844	548,309	442,145	395,613	1,330,364	1,155,277	3,060,356	29.7	12.9
2000	237,994	119,630	62,189	155,868	304,132	595,817	444,474	400,429	1,385,612	1,115,720	3,035,824	28.9	13.2
2005	250,271	168,964	67,116	140,159	312,108	495,083	539,999	489,548	1,385,037	988,717	2,962,417	35.3	16.5
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
2019	292,528	177,476	96,142	159,653	397,686	390,650	679,938	600,154	1,468,274	1,031,261	3,225,334	40.9	18.6

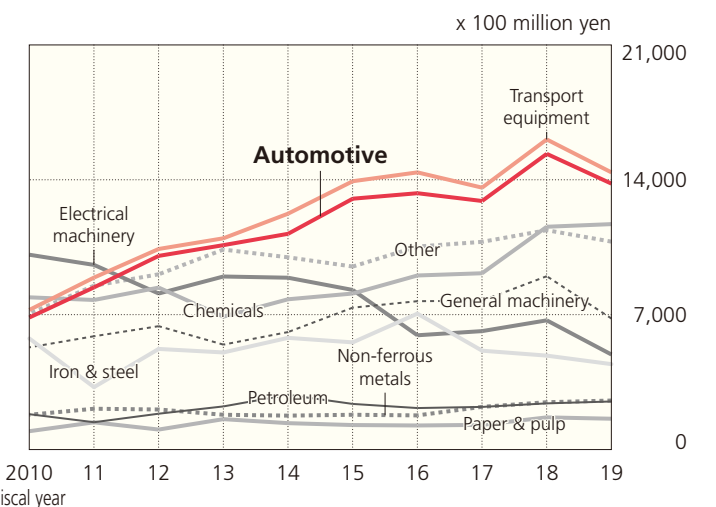
Notes: 1. Shipments from all manufacturing operations with four or more employees are included in this data. 2. Compilation of data on production in value terms was discontinued in 1996 and replaced by data on shipments in value terms. 3. Figures in value terms include domestic consumption tax revenue from shipments. 4. "Electrical Machinery & Equipment" includes IT-related electronic parts and equipment as of 2002. 5. 2019 data includes preliminary figures. Source for statistical data on this page: 2020 Census of Manufactures, Ministry of Economy, Trade and Industry

INVESTMENTS IN EQUIPMENT OF MAJOR MANUFACTURING SECTORS (FY 2019)



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, 2010-2019



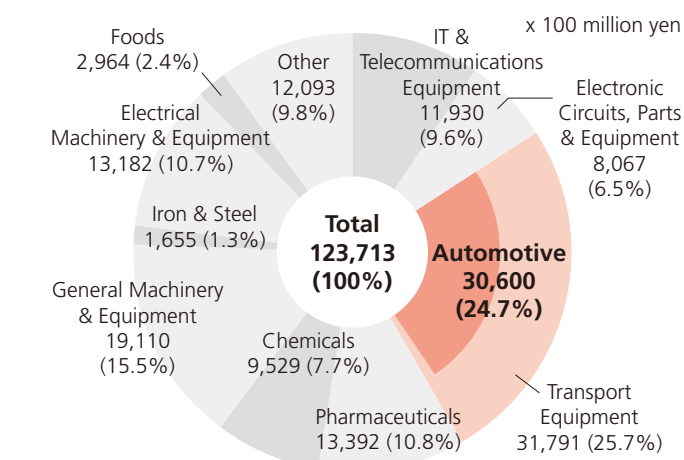
INVESTMENTS IN EQUIPMENT OF MAJOR MANUFACTURING SECTORS

x 100 million yen

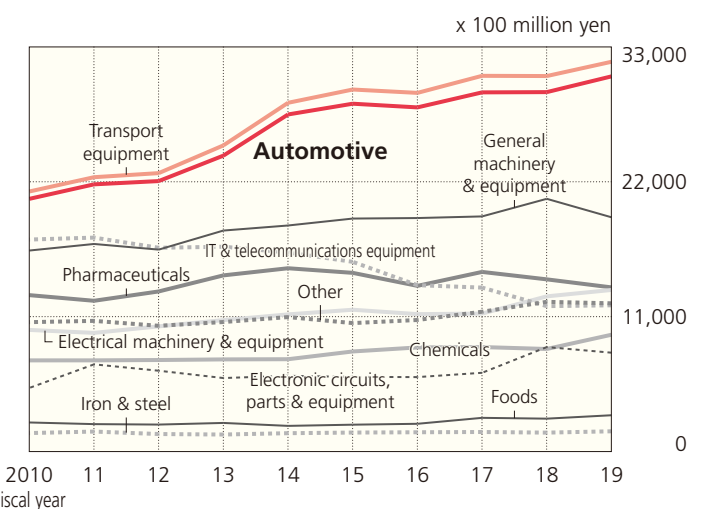
Fiscal year	Paper & Pulp	Chemicals	Petroleum	Iron & Steel	Non-Ferrous Metals	General Machinery	Electrical Machinery	Transport Equipment	Automotive	Other	Total
2010	955	7,902	1,837	5,767	1,808	5,307	10,113	7,249	6,855	7,048	47,986
2011	1,415	7,765	1,420	3,242	2,120	5,883	9,585	8,928	8,420	8,508	48,866
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
2019	1,602	11,702	2,497	4,435	2,546	6,802	4,934	14,386	13,803	10,792	59,696

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

R&D EXPENDITURES OF MAJOR MANUFACTURING SECTORS (FY 2019)



R&D EXPENDITURES OF MAJOR MANUFACTURING SECTORS, 2010-2019



R&D EXPENDITURES OF MAJOR MANUFACTURING SECTORS

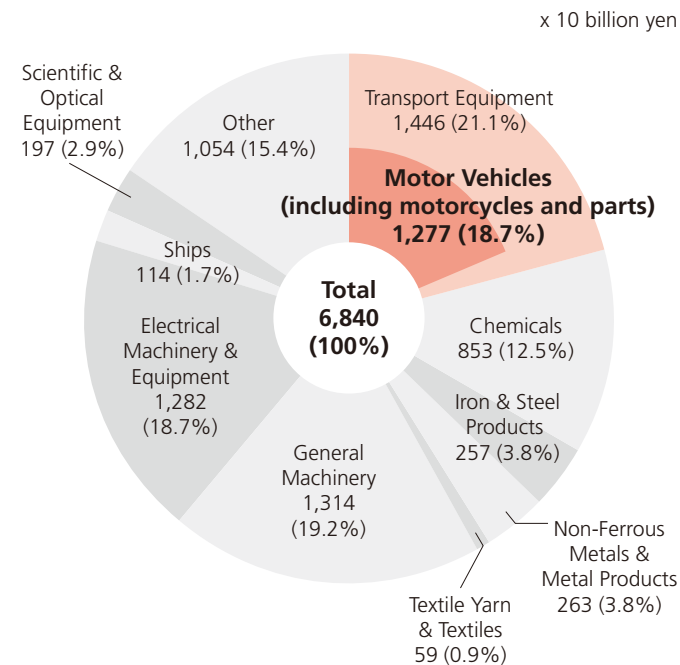
x 100 million yen

Fiscal year	IT & Telecommunications Equipment	Electronic Circuits, Parts & Equipment	Transport Equipment		Pharmaceuticals	Chemicals	General Machinery & Equipment	Iron & Steel	Electrical Machinery & Equipment	Foods	Other	Total
				Automotive								
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
2019	11,930	8,067	31,791	30,600	13,392	9,529	19,110	1,655	13,182	2,964	12,093	123,713

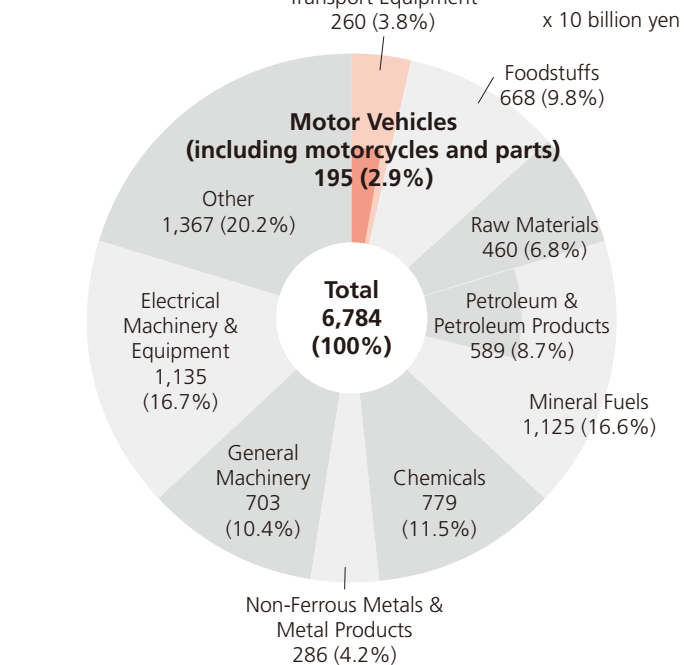
In Value Terms, Motor Vehicle Exports Total 12.8 Trillion Yen; Imports Total 2.0 Trillion Yen

In 2020 Japan's gross exports and imports declined from the previous year, by 11.1% and 13.7%, respectively. In value terms, automotive exports fell 19.7% from 2019 to 12.8 trillion yen, and imports decreased 18.8% year-on-year to 2.0 trillion yen.

EXPORTS BY PRINCIPAL COMMODITY (FOB) IN 2020



IMPORTS BY PRINCIPAL COMMODITY (CIF) IN 2020



AUTOMOTIVE EXPORTS IN VALUE TERMS (FOB)

Year	Motor Vehicles			Exports Total		
	Value	Chg. (%)	Passenger Cars, Trucks, Buses	Auto Parts	Motorcycles & Motorcycle Parts	Chg. (%)
2011	115,417	91.6	82,042	29,972	3,403	97.3
2012	127,521	110.5	92,250	32,051	3,220	97.3
2013	142,411	111.7	104,125	34,762	3,524	109.5
2014	147,849	103.8	109,194	34,750	3,905	104.8
2015	158,912	107.5	120,463	34,830	3,619	103.4
2016	151,175	95.1	113,329	34,617	3,229	92.6
2017	161,092	106.6	118,254	38,966	3,872	111.8
2018	166,972	103.7	123,072	39,909	3,990	104.1
2019	159,052	95.3	119,712	36,017	3,324	94.4
2020	127,738	80.3	95,796	29,124	2,818	88.9

AUTOMOTIVE IMPORTS IN VALUE TERMS (CIF)

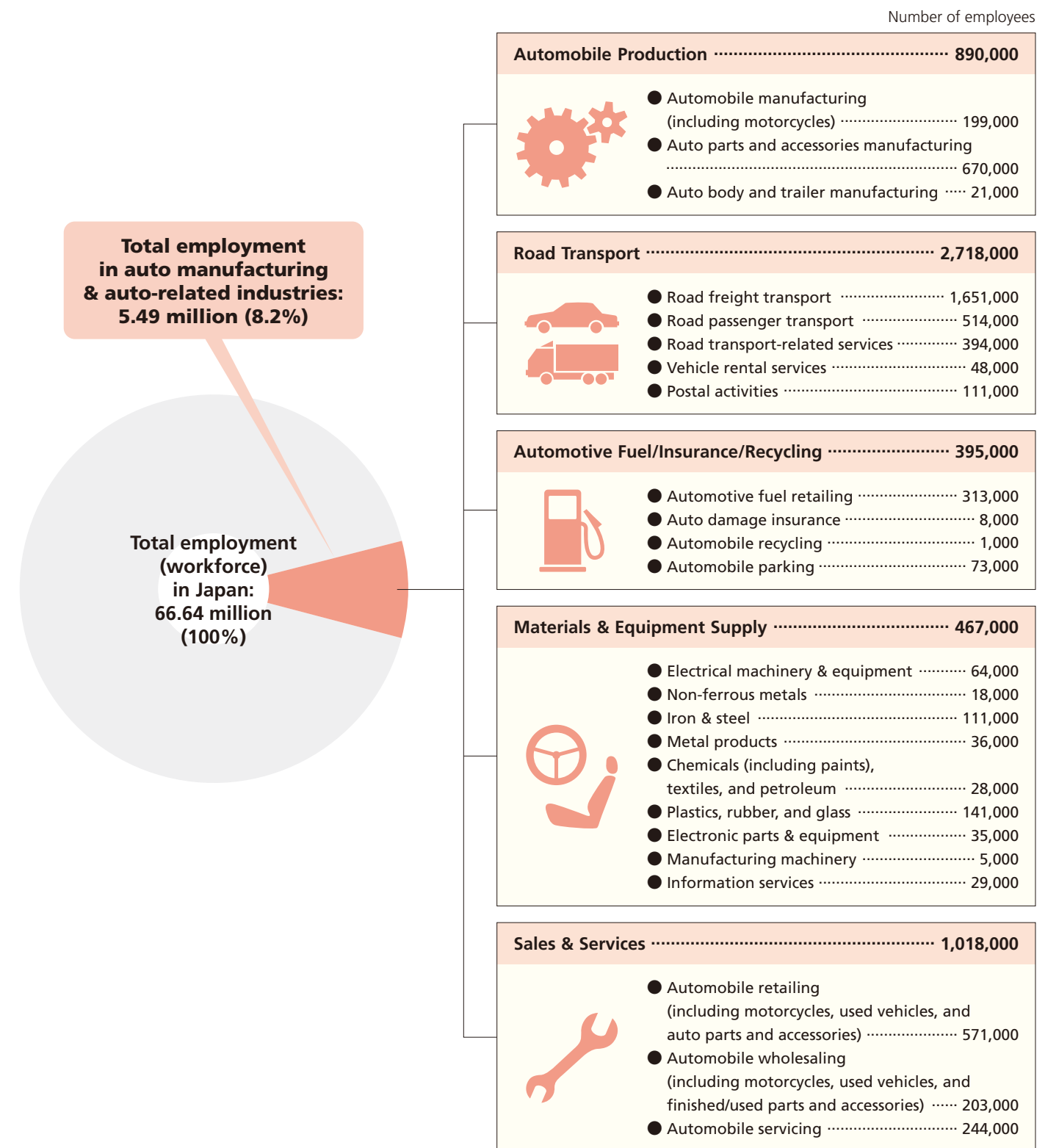
Year	Motor Vehicles			Imports Total		
	Value	Chg. (%)	Passenger Cars, Trucks, Buses	Auto Parts	Motorcycles & Motorcycle Parts	Chg. (%)
2011	12,805	111.2	7,352	4,717	736	112.1
2012	15,506	121.1	9,082	5,549	875	103.8
2013	18,948	122.2	10,857	6,981	1,109	114.9
2014	20,925	110.4	11,623	8,148	1,154	105.7
2015	21,261	101.6	11,398	8,770	1,093	91.3
2016	21,023	98.9	11,781	8,329	913	84.2
2017	23,419	111.4	13,070	9,328	1,021	114.1
2018	25,223	107.7	14,284	9,861	1,079	109.7
2019	24,020	95.2	14,084	8,906	1,030	95.0
2020	19,508	81.2	11,651	6,743	1,113	86.3

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 (2020), Japan Tariff Association

Auto-Related Employment Totals 5.49 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 5.49 million people.

EMPLOYMENT IN THE AUTOMOBILE MANUFACTURING AND AUTO-RELATED INDUSTRIES



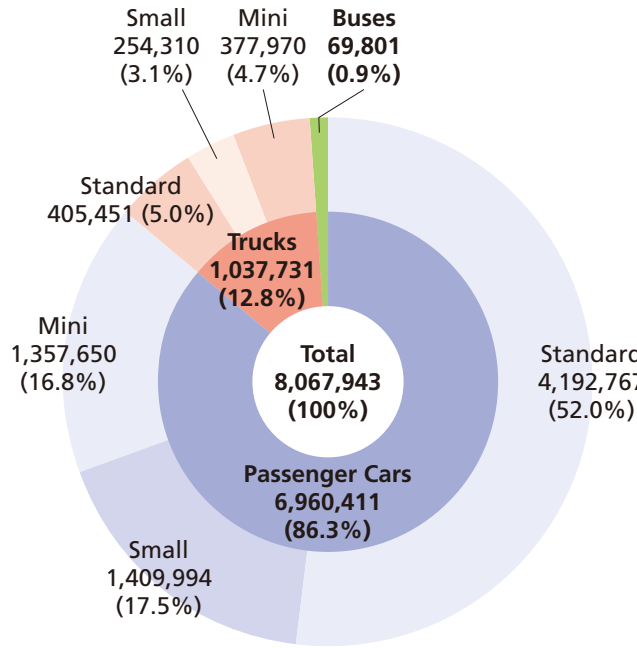
Note: Figures are rounded off to the nearest thousand.

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

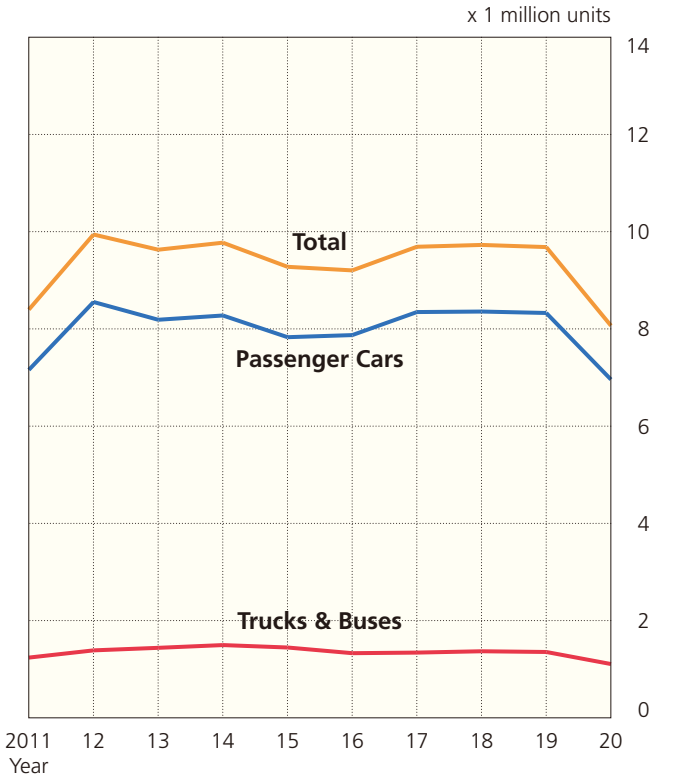
Motor Vehicle Production Totals 8.07 Million Units

In 2020 motor vehicle production in Japan stood at 8.07 million units, down 16.7% from 2019, registering a decline for the second consecutive year. Passenger car production dipped 16.4% to a total of 6.96 million units, with standard cars decreasing 21.1% to 4.19 million units, small cars falling 8.3% to 1.41 million units, and minicars dropping 7.8% to 1.36 million units. Meanwhile, truck production declined 15.8% from the previous year to 1.04 million units and bus production sank 43.1% to 70,000 units.

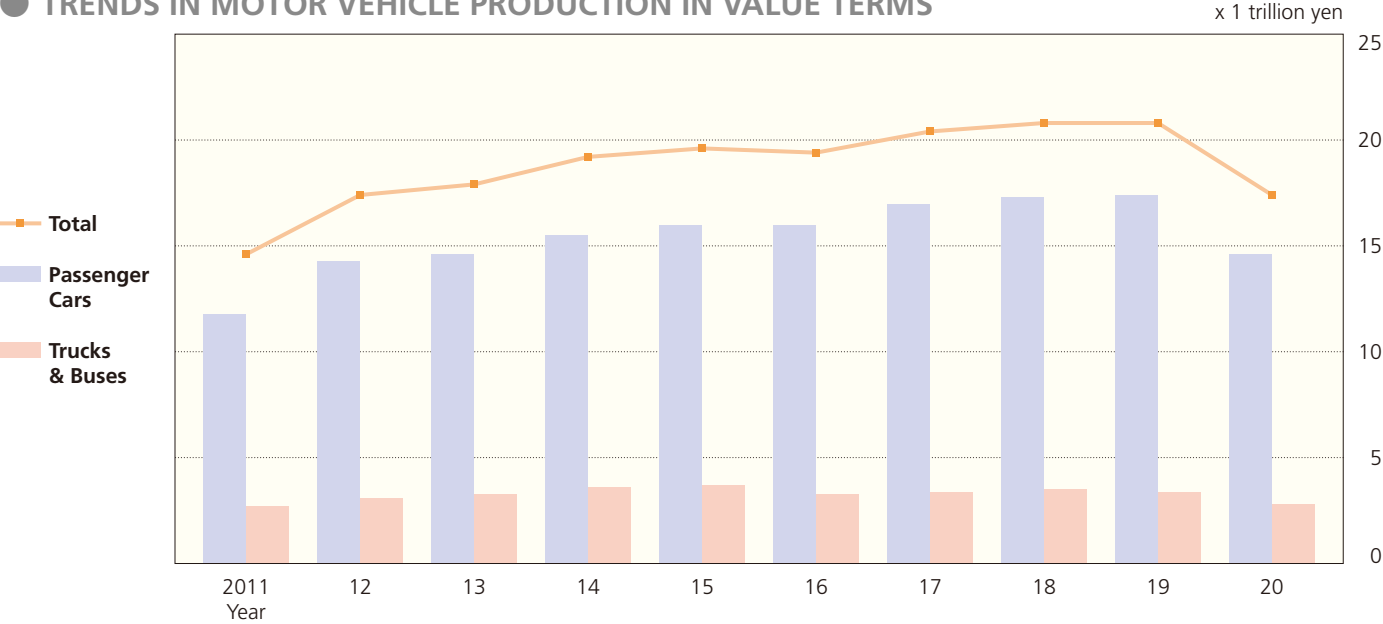
MOTOR VEHICLE PRODUCTION BY TYPE IN 2020



TRENDS IN MOTOR VEHICLE PRODUCTION



TRENDS IN MOTOR VEHICLE PRODUCTION IN VALUE TERMS



MOTOR VEHICLE PRODUCTION IN VALUE TERMS

x 1 million yen

Year	Passenger Cars				Trucks					Buses			Total
	Standard	Small	Mini	Subtotal	Standard	Small	Mini	Tractors	Subtotal	Large	Small	Subtotal	
1985	895,041	7,049,323	85,925	8,030,289	1,793,000	1,519,934	679,498	46,745	4,039,177	103,053	101,007	204,060	12,273,526
1990	3,717,356	8,676,715	572,188	12,966,259	1,953,924	1,180,028	591,144	64,913	3,790,009	134,015	66,988	201,003	16,957,271
1995	5,147,637	4,869,427	790,303	10,807,367	1,619,428	849,511	510,579	124,764	3,104,282	107,647	89,441	197,088	14,108,737
2000	6,640,075	4,298,370	1,237,605	12,176,050	1,111,558	543,408	357,765	45,453	2,058,184	80,897	109,007	189,904	14,424,138
2005	9,352,545	4,178,641	1,169,871	14,701,057	1,916,692	588,224	357,615	104,567	2,967,098	127,605	163,069	290,674	17,958,829
2010	10,239,303	2,609,861	1,207,423	14,056,587	1,684,489	358,081	323,800	75,944	2,442,314	118,300	211,359	329,659	16,828,560
2011	8,451,638	2,343,337	1,045,460	11,840,435	1,713,798	351,515	285,454	89,976	2,440,743	97,157	199,301	296,458	14,577,636
2012	9,683,441	3,091,067	1,486,926	14,261,434	1,954,449	422,502	302,836	106,209	2,785,996	120,992	237,199	358,191	17,405,621
2013	10,422,008	2,628,986	1,579,510	14,630,504	1,987,340	479,914	312,959	102,073	2,882,286	119,670	290,001	409,671	17,922,461
2014	11,110,107	2,636,872	1,795,440	15,542,419	2,189,242	546,377	313,522	118,091	3,167,232	124,114	318,410	442,524	19,152,175
2015	12,047,649	2,458,198	1,473,103	15,978,950	2,189,038	576,037	300,368	131,002	3,196,445	139,614	328,498	468,112	19,643,507
2016	12,321,649	2,438,906	1,280,853	16,041,408	1,888,981	566,781	290,991	129,781	2,876,534	172,906	299,220	472,126	19,390,068
2017	12,958,155	2,516,379	1,517,786	16,992,320	1,986,030	538,716	319,178	126,867	2,970,791	175,090	288,317	463,407	20,426,518
2018	13,367,843	2,398,835	1,545,687	17,312,365	2,007,940	570,136	359,483	128,658	3,066,217	138,240	275,391	413,631	20,792,213
2019	13,431,614	2,347,210	1,593,366	17,372,190	1,923,717	568,532	385,640	141,002	3,018,891	130,452	298,524	428,976	20,820,057
2020	10,893,199	2,178,494	1,528,289	14,599,982	1,608,220	492,720	344,847	106,908	2,552,695	68,588	170,077	238,665	17,391,342

Source: Ministry of Economy, Trade and Industry

MOTOR VEHICLE PRODUCTION

In vehicle units

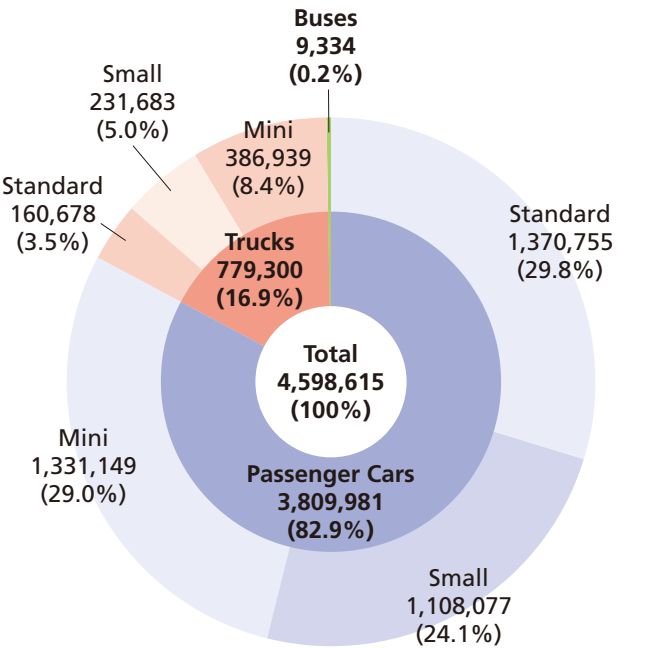
Year	Passenger Cars					Trucks					Buses		Total		Year
	Standard	Small	Mini	Subtotal	Chg. (%)	Standard	Small	Mini	Subtotal	Chg. (%)		Chg. (%)		Chg. (%)	
1970	51,619	2,377,639	749,450	3,178,708	121.7	258,100	1,253,861	551,922	2,063,883	102.1	46,566	111.3	5,289,157	113.1	1970
1975	209,032	4,198,550	160,272	4,567,854	116.2	288,170	1,610,475	438,987	2,337,632	90.8	36,105	78.8	6,941,591	105.9	1975
1980	403,338	6,438,847	195,923	7,038,108	114.0	885,198	2,113,311	914,679	3,913,188	115.2	91,588	146.4	11,042,884	114.6	1980
1985	494,792	6,991,432	160,592	7,646,816	108.1	1,278,212	1,877,893	1,388,583	4,544,688	105.2	79,591	110.2	12,271,095	107.0	1985
1990	1,750,783	7,361,224	835,965	9,947,972	109.9	1,249,525	1,262,943	986,171	3,498,639	89.0	40,185	95.5	13,486,796	103.5	1990
1995	2,553,703	4,140,629	916,201	7,610,533	97.5	824,140	909,321	804,276	2,537,737	93.9	47,266	96.2	10,195,536	96.6	1995
2000	3,376,447	3,699,893	1,283,094	8,359,434	103.2	649,180	483,282	594,356	1,726,818	98.8	54,544	112.7	10,140,796	102.5	2000
2005	4,191,360	3,416,622	1,408,753	9,016,735	103.4	723,663	436,763	546,185	1,706,611	98.6	76,313	126.3	10,799,659	102.7	2005
2010	4,846,411	2,159,119	1,304,832	8,310,362	121.1	520,627	238,776	449,776	1,209,179	122.7	109,334	126.0	9,628,875	121.4	2010
2011	4,180,361	1,861,279	1,116,885	7,158,525	86.1	512,260	234,586	389,150	1,135,996	93.9	104,109	95.2	8,398,630	87.2	2011
2012	4,686,396	2,252,672	1,615,435	8,554,503	119.5	583,156	275,992	407,206	1,266,354	111.5	122,220	117.4	9,943,077	118.4	2012
2013	4,618,014	1,888,759	1,682,550	8,189,323	95.7	580,012	300,635	427,530	1,308,177	103.3	132,681	108.6	9,630,181	96.9	2013
2014	4,657,765	1,750,895	1,868,410	8,277,070	101.1	604,768	327,928	425,065	1,357,761	103.8	139,834	105.4	9,774,665	101.5	2014
2015	4,744,471	1,555,548	1,530,703	7,830,722	94.6	586,645	330,814	392,290	1,309,749	96.5	137,850	98.6	9,278,321	94.9	2015
2016	4,999,566	1,610,486	1,263,834	7,873,886	100.6	505,970	317,182	377,921	1,201,073	91.7	129,743	94.1	9,204,702	99.2	2016
2017	5,147,256	1,715,970	1,484,610	8,347,836	106.0	515,521	292,901	411,319	1,219,741	101.6	123,097	94.9	9,690,674	105.3	2017
2018	5,256,226	1,605,162	1,497,898	8,359,286	100.1	517,641	306,259	433,211	1,257,111	103.1	113,197	92.0	9,729,594	100.4	2018
2019	5,317,165	1,538,380	1,473,211	8,328,756	99.6	506,390	293,002	433,525	1,232,917	98.1	122,621	108.3	9,684,294	99.5	2019
2020	4,192,767	1,409,994	1,357,650	6,960,411	83.6	405,451	254,310	377,970	1,037,731	84.2	69,801	56.9	8,067,943	83.3	2020

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 23 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

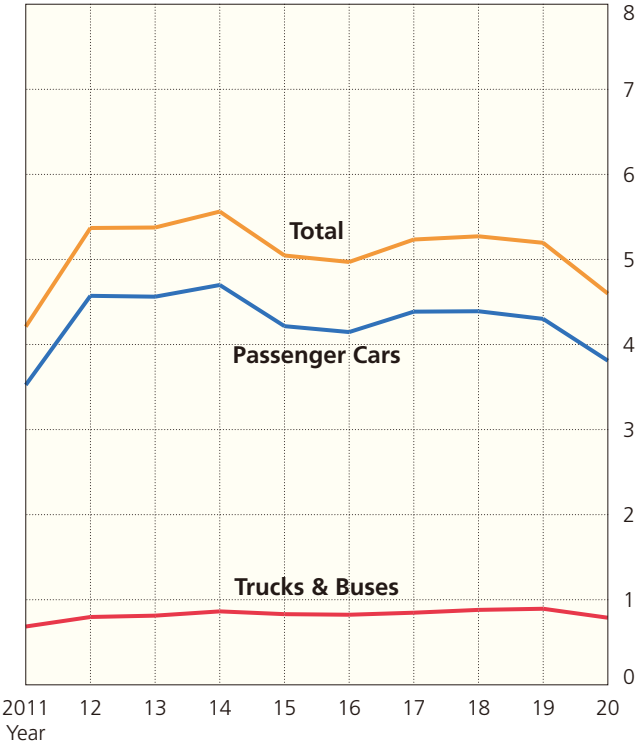
Motor Vehicle Sales Total 4.60 Million Units

Passenger car and commercial vehicle demand in Japan in 2020 stood at 4.60 million units, an 11.5% decrease from the previous year. Total passenger car sales shrank 11.4% to 3.81 million units, with standard cars falling 13.6% to 1.37 million units, small cars dropping 10.3% to 1.11 million units, and minicars declining 10% to 1.33 million units. Meanwhile, sales of trucks fell 11.5% from 2019 to 779,000 units and sales of buses dropped 31.3% to 9,000 units.

NEW MOTOR VEHICLE REGISTRATIONS BY TYPE IN 2020



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
2020	1,331,149	37,310	174,479	175,150	1,718,088	89.9

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					Buses				Total	Chg. (%)	Total Vehicles		Total Mini-Vehicles		Year
	Standard	Small	Mini	Subtotal	Chg. (%)	Standard	Small	Mini	Subtotal	Chg. (%)	Large	Small	Subtotal	Chg. (%)			Chg. (%)	Chg. (%)	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	10,256	17,572	27,828	104.2	4,100,467	106.9	2,844,554	104.9	1,255,913	111.7	1970
1975	49,125	2,531,396	157,120	2,737,641	119.7	121,118	999,155	431,181	1,551,454	100.7	8,818	11,018	19,836	87.4	4,308,931	111.9	3,720,630	118.8	588,301	82.1	1975
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	9,414	13,973	23,387	97.5	5,015,510	97.3	4,002,172	93.1	1,013,338	118.3	1980
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	8,798	12,775	21,573	106.4	5,556,834	102.2	4,028,132	101.3	1,528,702	104.8	1985
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	9,162	15,763	24,925	105.9	7,777,493	107.2	5,975,089	107.4	1,802,404	106.3	1990
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	6,475	10,828	17,303	97.0	6,865,034	105.2	5,149,414	104.8	1,715,620	106.2	1995
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	4,333	12,238	16,571	114.5	5,963,042	101.7	4,095,117	102.7	1,867,925	99.7	2000
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	5,856	11,898	17,754	97.8	5,852,067	100.0	3,928,351	99.1	1,923,716	101.7	2005
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	4,777	7,998	12,775	101.6	4,956,136	107.5	3,229,716	110.6	1,726,420	102.3	2010
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	3,136	7,515	10,651	83.4	4,210,219	84.9	2,689,074	83.3	1,521,145	88.1	2011
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	4,266	7,672	11,938	112.1	5,369,720	127.5	3,390,274	126.1	1,979,446	130.1	2012
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	4,181	7,075	11,256	94.3	5,375,513	100.1	3,262,522	96.2	2,112,991	106.7	2013
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	4,498	7,485	11,983	106.5	5,562,888	103.5	3,290,098	100.8	2,272,790	107.6	2014
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	5,260	8,127	13,387	111.7	5,046,510	90.7	3,150,310	95.8	1,896,200	83.4	2015
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	6,543	8,955	15,498	115.8	4,970,258	98.5	3,244,798	103.0	1,725,460	91.0	2016
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	6,602	8,991	15,593	100.6	5,234,165	105.3	3,390,824	104.5	1,843,341	106.8	2017
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	5,131	8,571	13,702	87.9	5,272,067	100.7	3,347,943	98.7	1,924,124	104.4	2018
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	4,876	8,710	13,586	99.2	5,195,216	98.5	3,284,870	98.1	1,910,346	99.3	2019
2020	1,370,755	1,108,077	1,331,149	3,809,981	88.6	160,678	231,683	386,939	779,300	88.5	3,113	6,221	9,334	68.7	4,598,615	88.5	2,880,527	87.7	1,718,088	89.9	2020

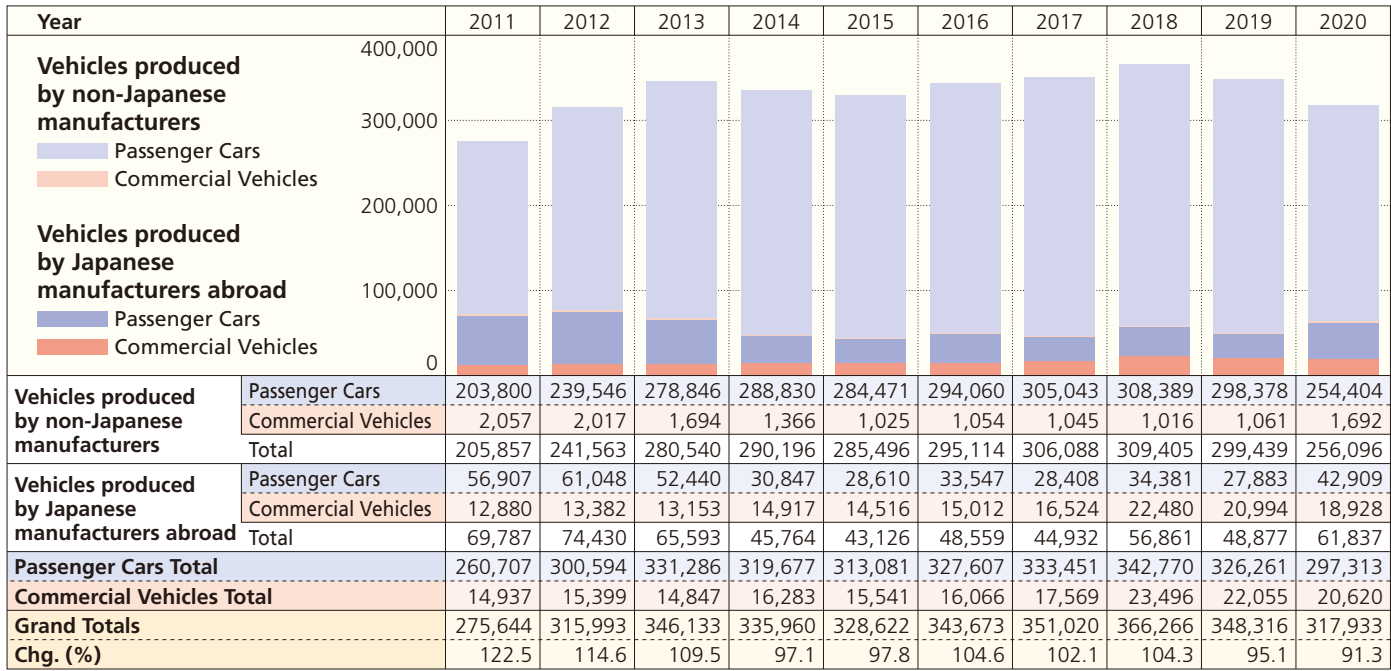
Notes: 1. Chassis-based through 2002, data compilation became vehicle registration number-based as of 2003. 2. Truck figures include special-purpose vehicles (except large ones). 3. Data includes imported cars. 4. "Chg. (%)" means change from the previous year (with the previous year's result indexed at 100).

Sources: Japan Automobile Dealers Association; Japan Mini Vehicles Association

318,000 New Imported Vehicles Sold in Total

Sales of new imported vehicles in Japan in 2020 totalled 318,000 units, down 8.7% from the previous year, with new passenger cars dropping 8.9% to 297,000 units and new commercial vehicles (trucks and buses) falling 6.5% to 21,000 units. Meanwhile, sales of used imported vehicles rose 3.7% from the previous year to 599,000 units, with used passenger cars and used trucks growing 3.5% to 578,000 units and 11.5% to 18,000 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
2020	282,606	84.2	24,036	622	307,264	85.0	707,491

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

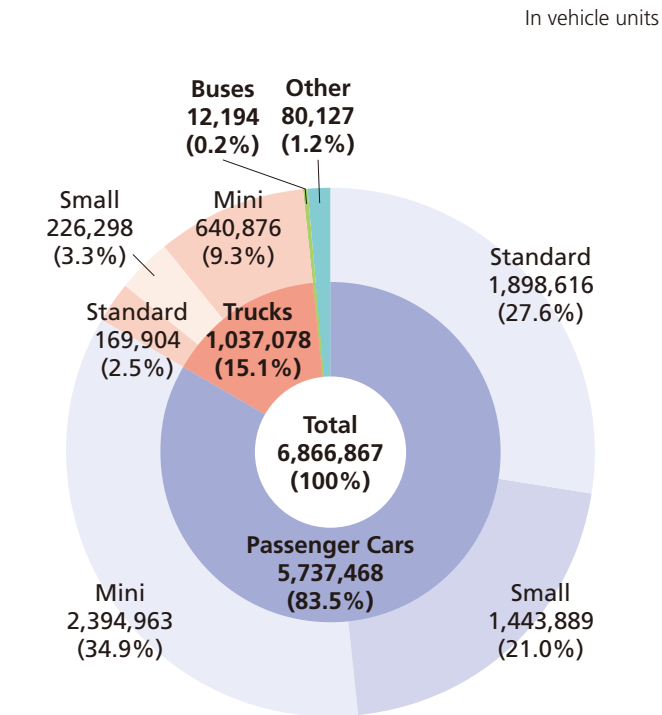
Year	Passenger Cars	Chg. (%)	Trucks	Chg. (%)	Special-Purpose Vehicles	Chg. (%)	Other	Total	Chg. (%)
2011	462,435	100.3	14,370	107.4	6,756	85.8	164	483,725	100.3
2012	487,675	105.5	14,636	101.9	5,469	81.0	248	508,028	105.0
2013	487,750	100.0	15,428	105.4	4,724	86.4	220	508,122	100.0
2014	485,055	99.4	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
2020	577,969	103.5	18,319	111.5	2,638	103.0	155	599,081	103.7

Notes: 1. For motor vehicle classifications in Japan, see page 23. 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

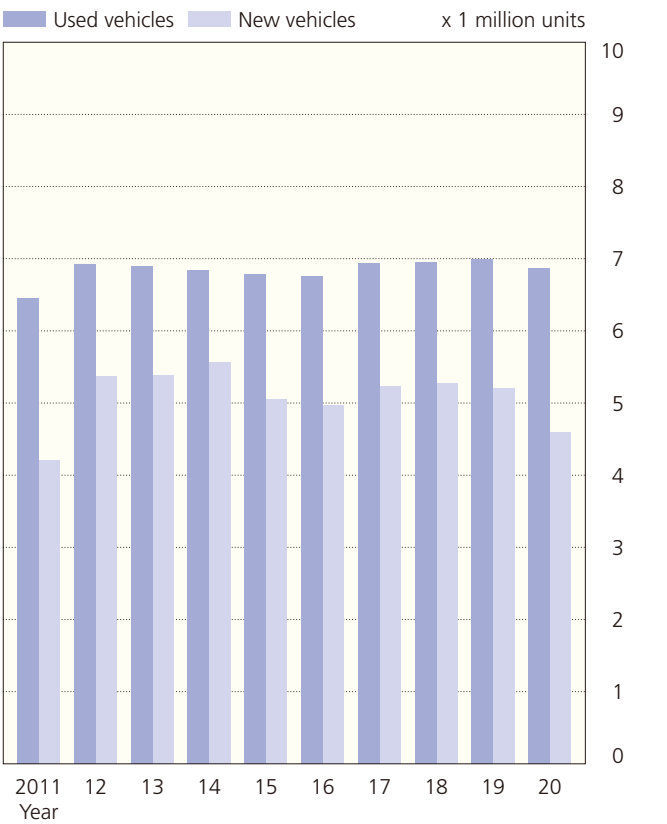
Used Vehicle Sales Total 6.87 Million Units

In 2020 sales of used motor vehicles shrank 1.7% from the previous year to 6.87 million units. Used passenger car sales totalled 5.74 million units, down 2.4% from the previous year, with small cars dropping 2.8% to 1.44 million units and minicars declining 4.4% to 2.40 million units, but standard passenger cars climbing 0.7% to 1.90 million units. Whereas sales of used trucks rose 1.2% to 1.04 million units, sales of used buses fell 5.3% to 12,000 units.

USED VEHICLE SALES BY TYPE IN 2020



TRENDS IN NEW AND USED MOTOR VEHICLE SALES



USED MOTOR VEHICLE SALES

In vehicle units

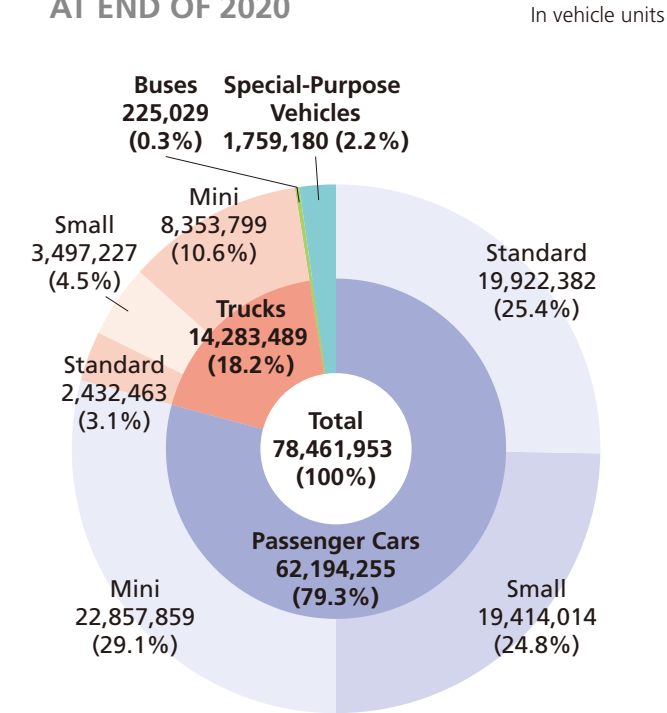
Year	Passenger Cars					Trucks					Buses		Other		Total	
	Standard	Small	Mini	Subtotal	Chg. (%)	Standard	Small	Mini	Subtotal	Chg. (%)		Chg. (%)		Chg. (%)		Chg. (%)
1985	160,150	3,295,092	356,726	3,811,968	100.9	139,459	589,321	1,125,545	1,854,325	108.3	11,655	103.1	44,620	116.7	5,722,568	103.3
1990	304,193	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
2020	1,898,616	1,443,889	2,394,963	5,737,468	97.6	169,904	226,298	640,876	1,037,078	101.2	12,194	94.7	80,127	106.5	6,866,867	98.3

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 23 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

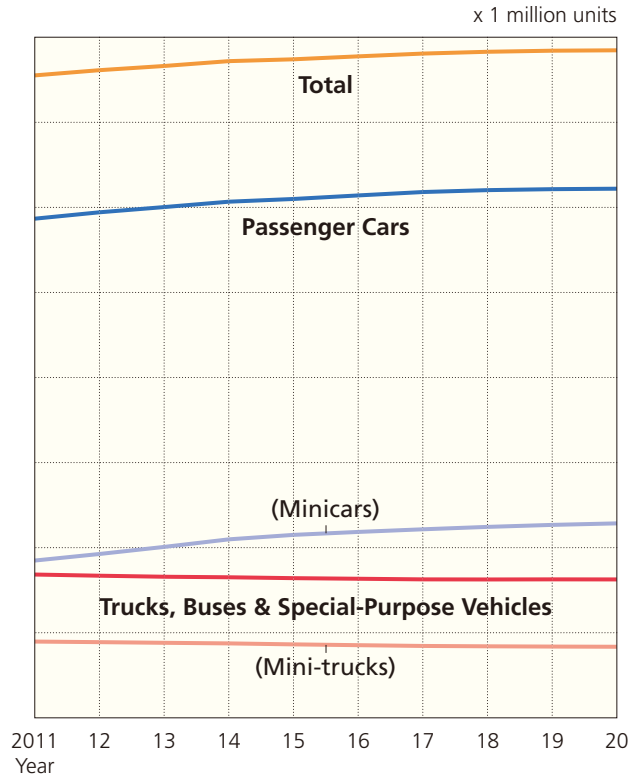
A Total of 78.46 Million Motor Vehicles in Use

At the end of December 2020, motor vehicles in use in Japan (excluding motorcycles) totalled 78.46 million units, a 0.1% increase over the previous year. Passenger cars in use increased 0.1% to 62.19 million units, with standard and minicars growing 1.6% and 0.8% to 19.92 million and 22.85 million units, respectively, but small cars dropping 2.2% to 19.41 million units. Meanwhile, trucks in use slipped 0.1% to 14.28 million units compared to the previous year and buses in use declined 3.1% from 2019 to 225,000 units. At the end of March 2020, the average service life of motor vehicles in Japan was 13.51 years for passenger cars, 15.31 years for trucks, and 18.31 years for buses.

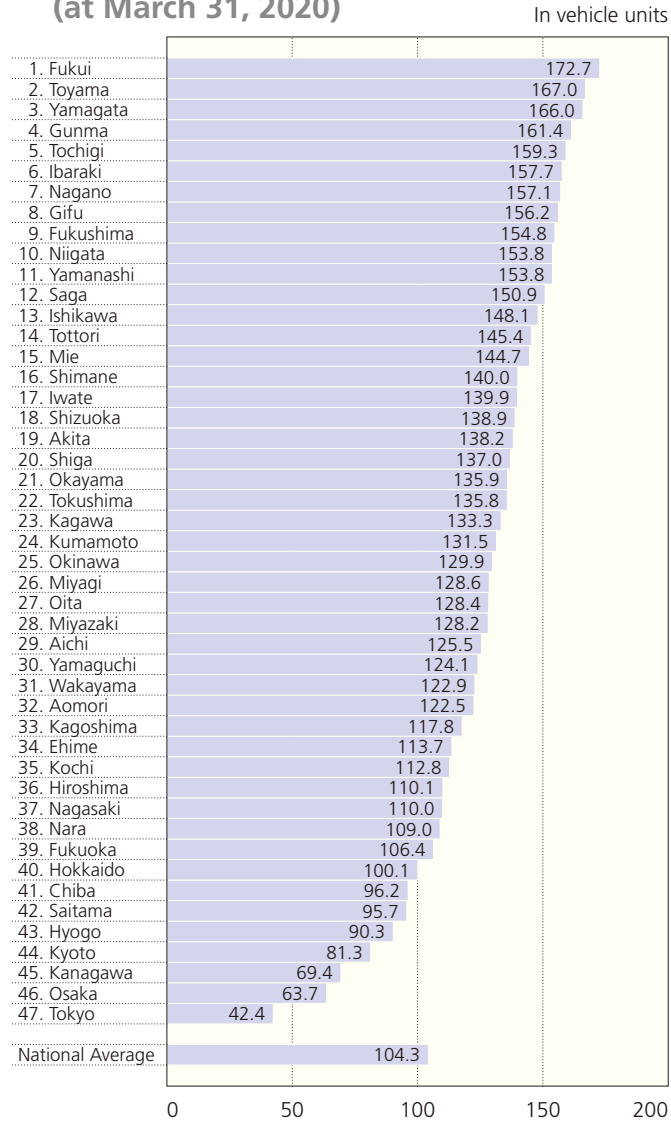
MOTOR VEHICLES IN USE BY TYPE AT END OF 2020



TRENDS IN MOTOR VEHICLES IN USE



PRIVATE PASSENGER CARS IN USE PER 100 HOUSEHOLDS BY PREFECTURE (at March 31, 2020)



Source: Automobile Inspection & Registration Information Association

PASSENGER CARS IN USE BY YEAR OF FIRST REGISTRATION

At March 31, 2020

Year of First Registration	Vehicles in Use	% of "Vehicles in Use" Total
April 2019-March 2020	2,700,702	6.87
April 2018-March 2019	2,815,217	7.17
April 2017-March 2018	2,792,394	7.11
April 2016-March 2017	2,718,753	6.92
April 2015-March 2016	2,446,972	6.23
April 2014-March 2015	2,335,938	5.95
April 2013-March 2014	2,653,088	6.75
April 2012-March 2013	2,423,851	6.17
April 2011-March 2012	2,215,831	5.64
April 2010-March 2011	2,013,398	5.13
April 2009-March 2010	2,139,007	5.45
April 2008-March 2009	1,561,686	3.98
April 2007-March 2008	1,673,442	4.26
April 2006-March 2007	1,412,104	3.59
-March 2006	7,378,025	18.78
Total "Vehicles in Use"	39,280,408	100

AVERAGE AGE BY TYPE

In years

Year	Passenger Cars	Trucks	Buses
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
2020	8.72	11.44	11.86

AVERAGE SERVICE LIFE BY TYPE

In years

Year	Passenger Cars	Trucks	Buses
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
2020	13.51	15.31	18.31

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

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

In vehicle units

Year	Passenger Cars					Trucks					Buses				Special-Purpose Vehicles		Total		Trailers	Three-Wheeled Vehicles	Year
	Standard	Small	Mini	Subtotal	Chg. (%)	Standard	Small	Mini	Subtotal	Chg. (%)	Large	Small	Subtotal	Chg. (%)		Chg. (%)	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	104,895	83,085	187,980	110.5	333,132	110.5	17,581,843	116.2	23,079	243,934	1970
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	102,186	124,098	226,284	101.7	584,100	101.7	28,090,558	104.9	39,808	47,998	1975
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	106,633	123,387	230,020	100.4	789,155	100.4	37,856,174	104.5	56,804	17,724	1980
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	108,967	122,261	231,228	100.5	941,647	100.5	46,157,261	103.7	65,485	6,123	1985
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	114,819	130,849	245,668	101.6	1,206,390	101.6	57,697,669	104.7	87,359	4,056	1990
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	114,478	128,617	243,095	99.1	1,500,219	99.1	66,853,500	102.8	120,171	3,621	1995
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	110,046	125,437	235,483	99.9	1,750,733	99.9	72,649,099	101.3	133,676	3,827	2000
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	109,917	121,816	231,733	100.3	1,630,062	98.8	75,686,455	101.4	147,626	3,280	2005
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	108,136	119,135	227,271	99.5	1,502,593	99.2	75,361,876	100.0	152,834	3,120	2010
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	107,435	118,513	225,948	99.4	1,646,203	109.6	75,512,887	100.2	154,100	3,089	2011
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	107,528	118,551	226,079	100.1	1,643,325	99.8	76,125,533	100.8	155,835	14,816	2012
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	107,723	118,204	225,927	99.9	1,653,956	100.6	76,619,066	100.6	157,212	15,478	2013
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	108,545	118,399	226,944	100.5	1,669,019	100.9	77,188,466	100.7	159,863	16,376	2014
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	110,096	119,293	229,389	101.1	1,684,382	100.9	77,404,331	100.3	162,350	17,391	2015
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	112,011	120,310	232,321	101.3	1,702,616	101.1	77,750,520	100.4	165,769	18,494	2016
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	112,672	120,794	233,466	100.5	1,720,118	101.0	78,077,869	100.4	169,989	19,457	2017
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	112,627	120,596	233,223	99.9	1,734,185	100.8	78,289,437	100.3	174,657	20,425	2018
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	112,169	119,997	232,166	99.5	1,746,765	100.7	78,416,591	100.2	180,662	21,420	2019
2020	19,922,382	19,414,014	22,857,859	62,194,255	100.1	2,432,463	3,497,227	8,353,799	14,283,489	99.9	108,999	116,030	225,029	96.9	1,759,180	100.7	78,461,953	100.1	185,088	22,598	2020

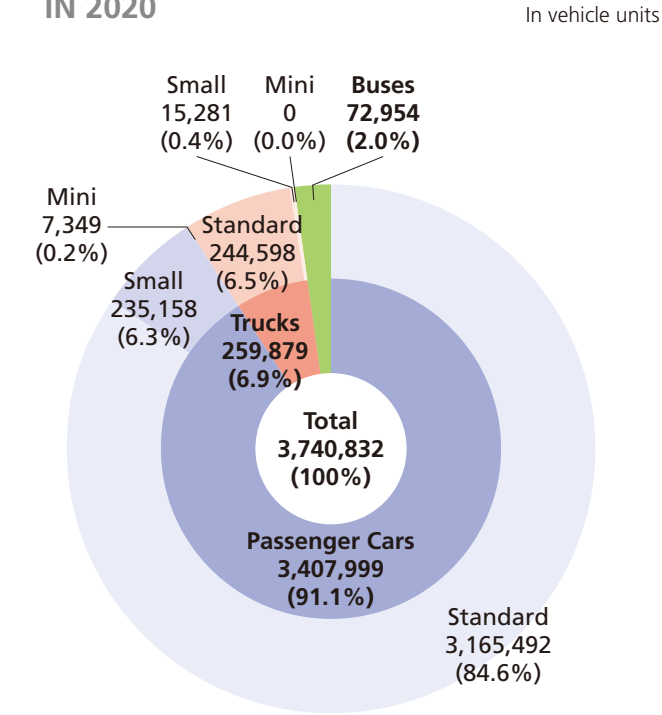
Notes: 1. "Special-Purpose Vehicles" refers to emergency vehicles, special vehicles equipped with beds, refrigerated trucks, tank trucks, tractors, bulldozers, steamrollers, snowplows, snowmobiles, etc., that are identified as special-purpose vehicles by special registration numbers. 2. "Three-Wheeled Vehicles" includes three-wheeled passenger cars, trucks, and special-purpose vehicles. 3. "Chg. (%)" means change from the previous year (with the previous year's result indexed at 100).

Source: Ministry of Land, Infrastructure, Transport and Tourism

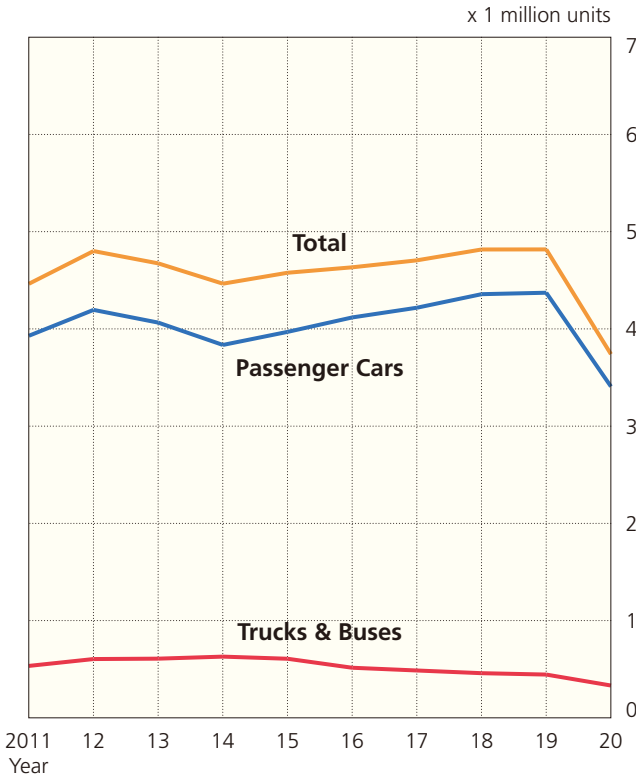
Motor Vehicle Exports Total 3.74 Million Units

Exports of motor vehicles in 2020 totalled 3.74 million units, with passenger car, truck, and bus exports shrinking 22.1%, 20%, and 39.5% from the previous year to 3.41 million units, 260,000 units, and 73,000 units, respectively.

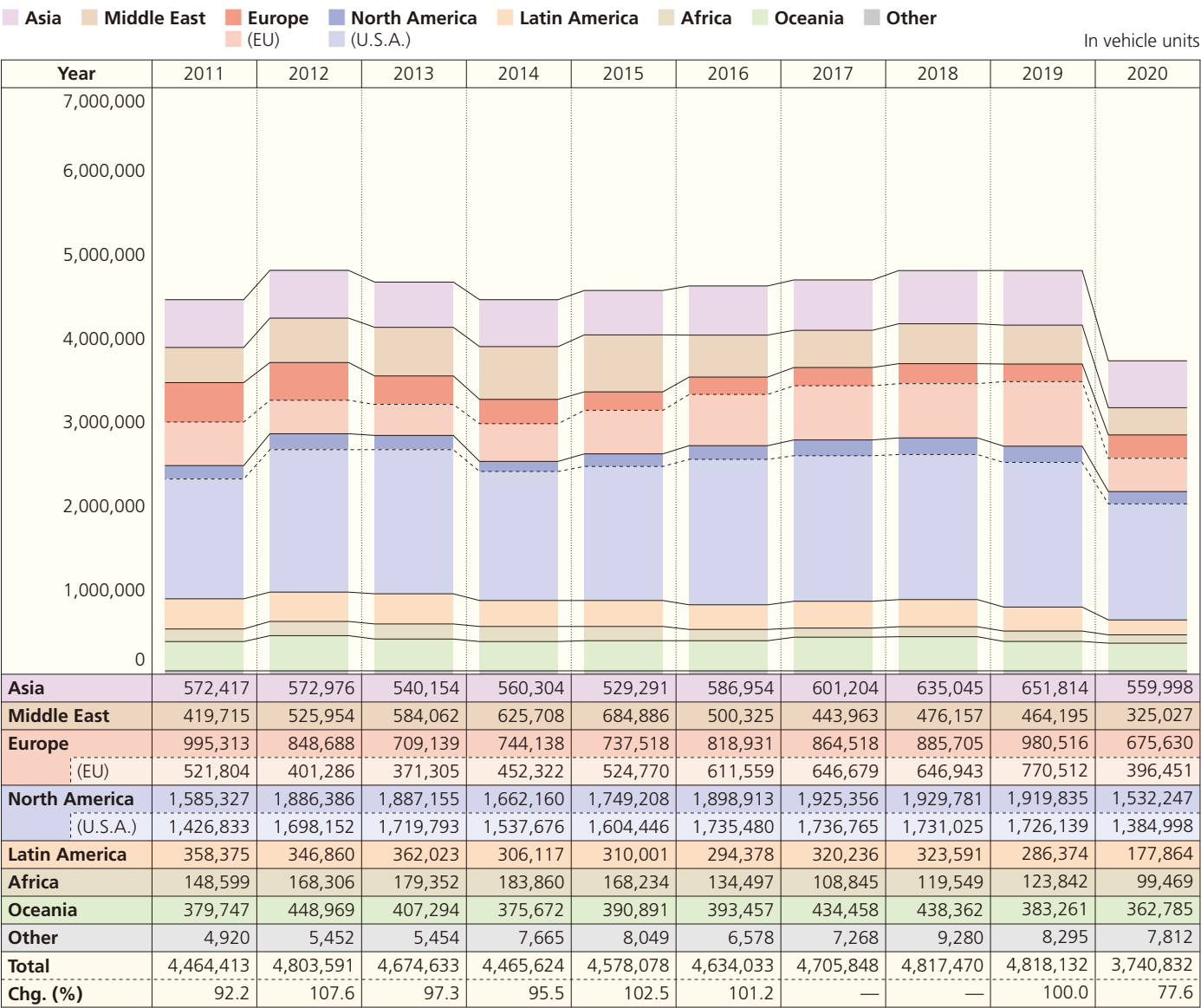
MOTOR VEHICLE EXPORTS BY TYPE IN 2020



TRENDS IN MOTOR VEHICLE EXPORTS



MOTOR VEHICLE EXPORT TRENDS BY DESTINATION



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

MOTOR VEHICLE EXPORTS

Year	Passenger Cars					Trucks					Buses		Total		Year
	Standard	Small	Mini	Subtotal	Chg. (%)	Standard	Small	Mini	Subtotal	Chg. (%)		Chg. (%)		Chg. (%)	
1970	715,450		10,136	725,586	129.5	65,170	272,549	13,892	351,611	120.9	9,579	141.6	1,086,776	126.7	1970
1975	1,821,835		5,451	1,827,286	105.8	168,370	643,232	22,071	833,673	95.3	16,653	104.3	2,677,612	102.3	1975
1980	345,413	3,580,623	21,124	3,947,160	127.2	332,257	1,548,251	73,177	1,953,685	137.2	66,116	179.4	5,966,961	130.8	1980
1985	493,047	3,932,414	1,301	4,426,762	111.2	1,196,973	1,029,757	11,374	2,238,104	108.0	65,606	116.7	6,730,472	110.2	1985
1990	1,343,967	3,138,147	16	4,482,130	101.8	944,737	364,376	8	1,309,121	90.6	39,961	113.7	5,831,212	99.1	1990
1995	1,156,122	1,732,050	8,044	2,896,216	86.2	612,654	236,929	276	849,859	82.8	44,734	60.8	3,790,809	85.0	1995
2000	2,333,263	1,462,069	520	3,795,852	101.0	530,823	86,329	718	617,870	100.8	41,163	107.3	4,454,885	101.0	2000
2005	3,164,603	1,198,273	292	4,363,168	103.5	521,848	89,946	162	611,956	89.0	77,937	139.6	5,053,061	101.9	2005
2010	3,453,951	818,660	2,755	4,275,366	133.2	397,404	52,908	0	450,312	142.7	115,782	125.8	4,841,460	133.9	2010
2011	3,176,195	743,509	10,200	3,929,904	91.9	369,973	53,786	8	423,767	94.1	110,742	95.6	4,464,413	92.2	2011
2012	3,550,010	641,749	6,735	4,198,494	106.8	410,251	66,652	16	476,919	112.5	128,178	115.7	4,803,591	107.6	2012
2013	3,564,559	499,541	1,419	4,065,519	96.8	397,694	74,465	20	472,179	99.0	136,935	106.8	4,674,633	97.3	2013
2014	3,593,941	239,198	2,456	3,835,595	94.3	408,859	79,614	0	488,473	103.5	141,556	103.4	4,465,624	95.5	2014
2015	3,759,771	205,727	4,505	3,970,003	103.5	392,531	74,245	0	466,776	95.6	141,299	99.8	4,578,078	102.5	2015
2016	3,871,859	241,206	5,367	4,118,432	103.7	339,821	44,138	0	383,959	82.3	131,642	93.2	4,634,033	101.2	2016
2017	3,944,646	270,707	3,076	4,218,429	102.4	326,120	42,287	0	368,407	—	119,012	—	4,705,848	—	2017
2018	4,120,080	230,684	7,018	4,357,782	103.3	331,004	19,082	5	350,091	—	109,597	—	4,817,470	—	2018
2019	4,138,078	231,404	3,163	4,372,645	100.3	315,186	9,787	0	324,973	92.8	120,514	110.0	4,818,132	100.0	2019
2020	3,165,492	235,158	7,349	3,407,999	77.9	244,598	15,281	0	259,879	80.0	72,954	60.5	3,740,832	77.6	2020

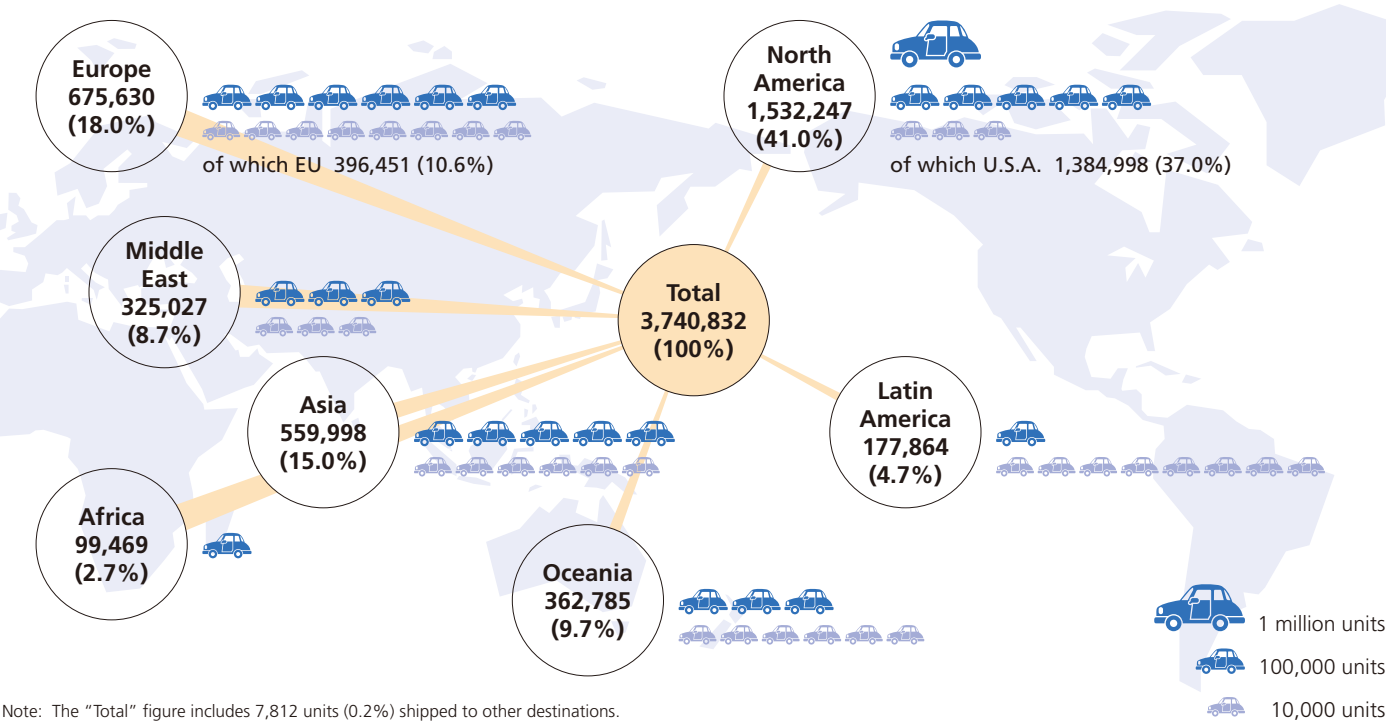
Notes: 1. Figures represent ex-factory export shipments of motor vehicles manufactured in Japan, which are classified in the above categories as per Japanese law, including the Road Vehicles Act. 2. Vehicle type classification in this table differs somewhat from that used in Ministry of Finance export data. 3. KD sets have been excluded since 1979; they represent less than 60% of the 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 available. 5. "Chg. (%)" means change from the previous year (with the previous year's result indexed at 100).

Source: Japan Automobile Manufacturers Association

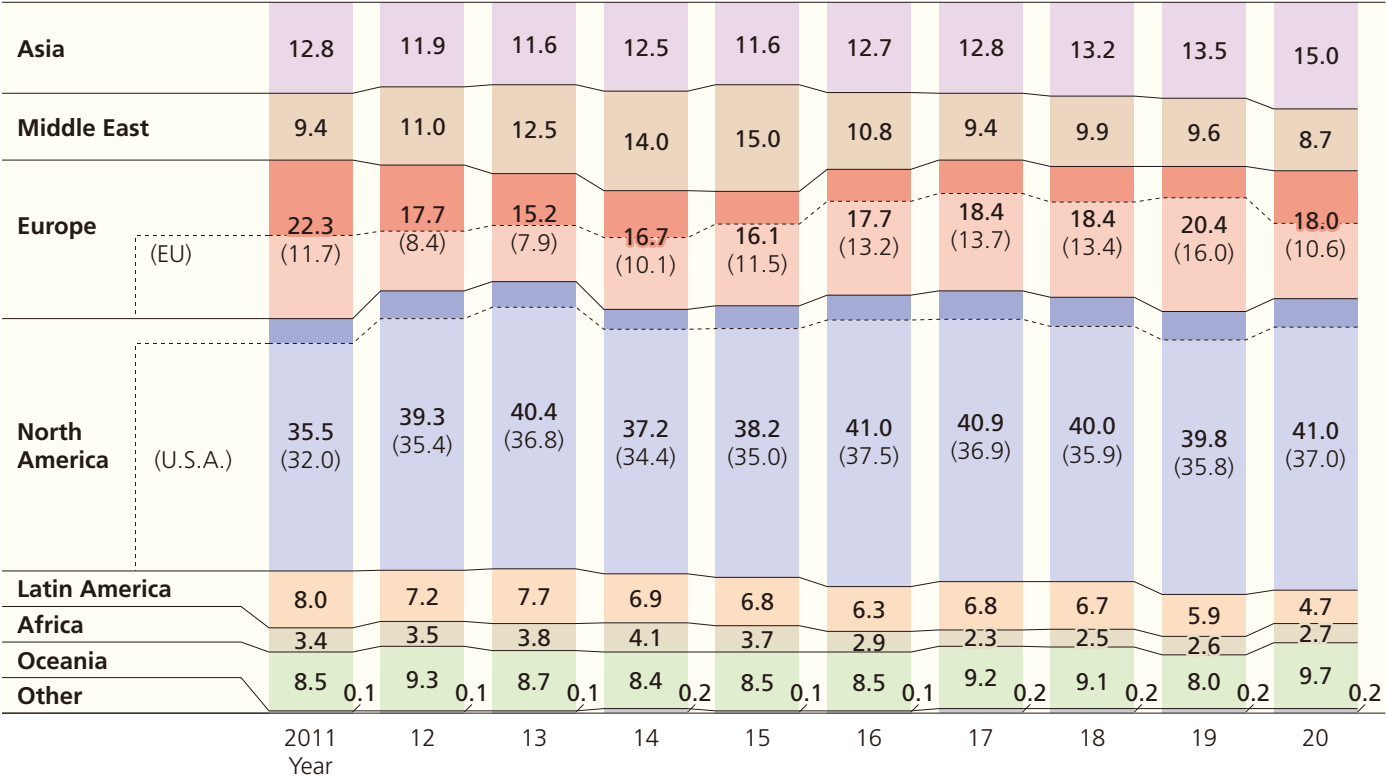
A Decline in Motor Vehicle Exports to All Regions

Motor vehicle exports decreased in 2020 from the previous year to North America (1.53 million units), Europe (676,000 units), Asia (560,000 units), Oceania (363,000 units), the Middle East (325,000 units), Latin America (178,000 units), and Africa (99,000 units).

● MOTOR VEHICLE EXPORTS BY DESTINATION IN 2020



● MOTOR VEHICLE EXPORT TRENDS BY DESTINATION



● MOTOR VEHICLE EXPORTS BY DESTINATION & BY VEHICLE TYPE IN 2020

In vehicle units

Destination		Passenger Cars				Trucks				Buses	Total
		Standard	Small	Mini	Subtotal	Standard	Small	Mini	Subtotal		
Asia	South Korea	13,543	148	0	13,691	236	0	0	236	0	13,927
	China	282,012	0	0	282,012	0	0	0	0	0	282,012
	Taiwan	82,658	6,409	0	89,067	8,069	0	0	8,069	417	97,553
	Hong Kong	6,218	4,939	17	11,174	2,581	0	0	2,581	622	14,377
	Thailand	791	29	0	820	6,406	0	0	6,406	8,763	15,989
	Singapore	6,384	1,769	0	8,153	4,271	610	0	4,881	140	13,174
	Malaysia	11,959	3,757	0	15,716	7,738	240	0	7,978	2	23,696
	Philippines	5,643	989	0	6,632	5,030	0	0	5,030	10,756	22,418
	Indonesia	7,324	857	0	8,181	7,454	0	0	7,454	2,399	18,034
	Pakistan	34	788	6,437	7,259	1,756	0	0	1,756	614	9,629
	Other	25,742	852	120	26,714	15,345	5,830	0	21,175	1,300	49,189
	Subtotal	442,308	20,537	6,574	469,419	58,886	6,680	0	65,566	25,013	559,998
Middle East	Bahrain	8,075	91	0	8,166	942	0	0	942	1,024	10,132
	Saudi Arabia	87,958	287	0	88,245	17,664	0	0	17,664	2,071	107,980
	Kuwait	28,039	290	0	28,329	2,080	0	0	2,080	1,730	32,139
	Oman	15,086	350	0	15,436	8,853	0	0	8,853	1,233	25,522
	Israel	32,823	4,991	0	37,814	476	0	0	476	0	38,290
	United Arab Emirates	49,740	1,203	0	50,943	11,376	0	0	11,376	2,292	64,611
	Qatar	9,311	721	0	10,032	1,291	0	0	1,291	1,108	12,431
	Other	24,375	370	0	24,745	7,590	0	0	7,590	1,587	33,922
	Subtotal	255,407	8,303	0	263,710	50,272	0	0	50,272	11,045	325,027
Europe	Sweden	17,000	872	0	17,872	0	0	0	0	0	17,872
	Denmark	4,855	3,394	0	8,249	0	0	0	0	0	8,249
	UK	10,115	538	0	10,653	0	0	0	0	0	10,653
	Netherlands	12,328	3,444	0	15,772	0	0	0	0	0	15,772
	Belgium	9,996	2,627	0	12,623	0	0	0	0	0	12,623
	France	26,102	19,179	775	46,056	0	0	0	0	0	46,056
	Germany	78,743	17,773	0	96,516	0	0	0	0	0	96,516
	Spain	37,253	2,302	0	39,555	0	0	0	0	0	39,555
	Italy	21,429	28,086	0	49,515	4,580	10	0	4,590	0	54,105
	Finland	6,321	447	0	6,768	0	0	0	0	0	6,768
	Poland	22,828	3,228	0	26,056	1	0	0	1	0	26,057
	Austria	9,022	2,572	0	11,594	63	0	0	63	53	11,710
	Greece	898	2,524	0	3,422	0	0	0	0	0	3,422
	Other	35,139	10,498	0	45,637	1,456	0	0	1,456	0	47,093
	Subtotal	292,029	97,484	775	390,288	6,100	10	0	6,110	53	396,451
	Norway	14,582	778	0	15,360	35	0	0	35	0	15,395
	UK	80,088	49,614	0	129,702	0	0	0	0	0	129,702
	Switzerland	10,834	3,902	0	14,736	0	0	0	0	0	14,736
	Russia	83,707	2,041	0	85,748	2,402	0	0	2,402	165	88,315
	Turkey	5,349	1,286	0	6,635	2,682	0	0	2,682	0	9,317
	Ukraine	18,920	548	0	19,468	383	0	0	383	0	19,851
	Other	1,563	285	0	1,848	15	0	0	15	0	1,863
	Subtotal	507,072	155,938	775	663,785	11,617	10	0	11,627	218	675,630
North America	Canada	146,583	0	0	146,583	666	0	0	666	0	147,249
	U.S.A.	1,370,586	0	0	1,370,586	14,412	0	0	14,412	0	1,384,998
	Subtotal	1,517,169	0	0	1,517,169	15,078	0	0	15,078	0	1,532,247
Latin America	Mexico	47,506	20,653	0	68,159	8,442	0	0	8,442	3,508	80,109
	Puerto Rico	20,932	0	0	20,932	85	0	0	85	0	21,017
	Colombia	8,448	241	0	8,689	9,311	0	0	9,311	434	18,434
	Ecuador	1,376	52	0	1,428	1,317	0	0	1,317	254	2,999
	Peru	5,448	188	0	5,636	2,529	0	0	2,529	599	8,764
	Chile	13,351	1,601	0	14,952	1,128	0	0	1,128	15	16,095
	Brazil	3,292	697	0	3,989	0	0	0	0	0	3,989
	Other	13,491	2,966	0	16,457	7,421	176	0	7,597	2,403	26,457
	Subtotal	113,844	26,398	0	140,242	30,233	176	0	30,409	7,213	177,864
Africa	Algeria	820	0	0	820	87	0	0	87	0	907
	Egypt	2,304	0	0	2,304	11,379	7,668	0	19,047	4,694	26,045
	Nigeria	365	0	0	365	239	0	0	239	371	975
	Kenya	52	37	0	89	2,949	0	0	2,949	0	3,038
	South Africa	14,953	2,150	0	17,103	5,559	680	0	6,239	12,525	35,867
	Other	8,958	943	0	9,901	17,283	0	0	17,283	5,453	32,637
	Subtotal	27,452	3,130	0	30,582	37,496	8,348	0	45,844	23,043	99,469
Oceania	Australia	269,232	14,633	0	283,865	32,532	0	0	32,532	2,283	318,680
	New Zealand	27,060	5,655	0	32,715	2,852	0	0	2,852	298	35,865
	Other	3,563	564	0	4,127	2,139	67	0	2,206	1,907	8,240
	Subtotal	299,855	20,852	0	320,707	37,523	67	0	37,590	4,488	362,785
Other		2,385	0	0	2,385	3,493	0	0	3,493	1,934	7,812
Grand Totals		3,165,492	235,158	7,349	3,407,999	244,598	15,281	0	259,879	72,954	3,740,832

Notes: 1. Since December 2017, export figures from one JAMA member manufacturer have not been available. 2. The UK was counted as part of the EU for January, and as part of Europe from February onwards.

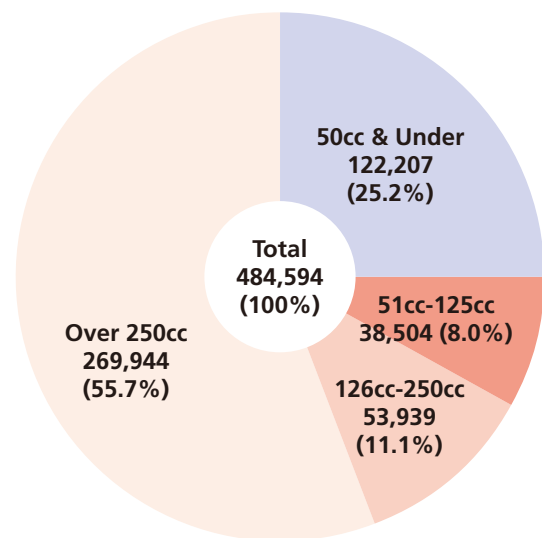
Source: Japan Automobile Manufacturers Association

Motorcycle Production Totals 485,000 Units

Overall domestic motorcycle production in 2020 declined 14.6% from the previous year to 485,000 units. By engine capacity, there was a decrease in production in every category, with Class 1 motor-driven cycles (50cc and under) falling 6.7% to 122,000 units, Class 2 motor-driven cycles (51cc to 125cc) shrinking 19.7% to 39,000 units, mini-sized motorcycles (126cc to 250cc) dipping 1.4% to 54,000 units, and small-sized motorcycles (over 250cc) declining 19.1% to 270,000 units. The combined total for larger motorcycles (all those over 50cc) dropped 17.0% to 362,000 units.

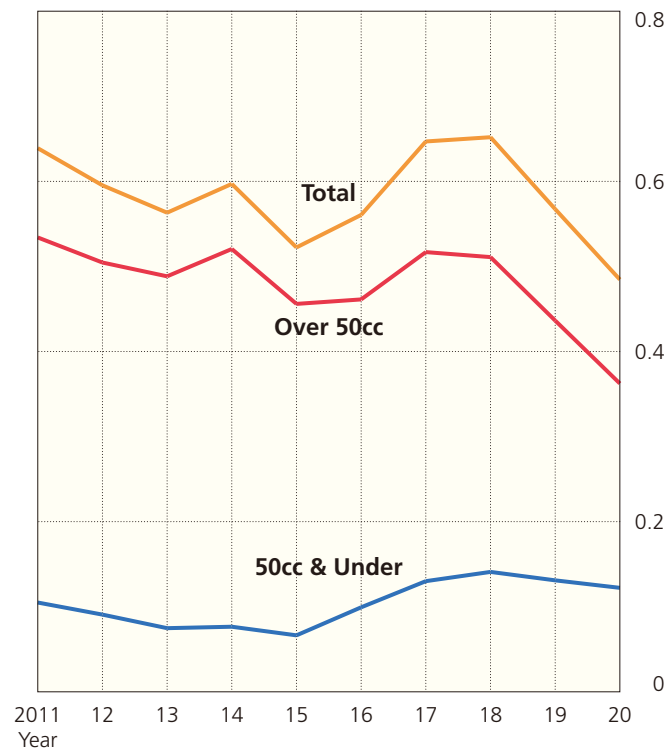
MOTORCYCLE PRODUCTION BY ENGINE CAPACITY IN 2020

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	333,736	436,363	567,376	87.0
2020	122,207	38,504	53,939	269,944	362,387	484,594	85.4

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

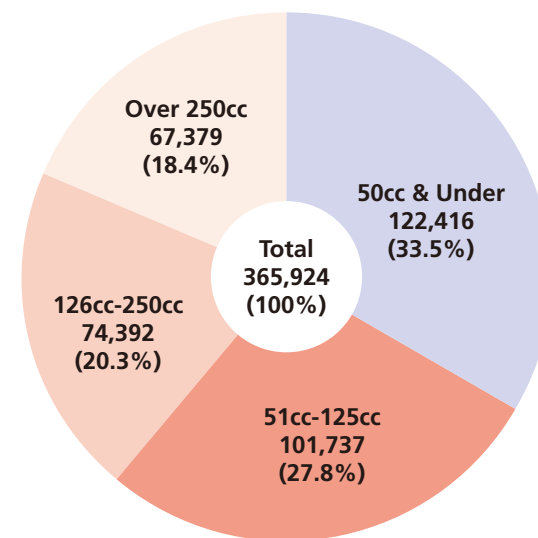
Source: Japan Automobile Manufacturers Association

Motorcycle Sales Total 366,000 Units

Domestic motorcycle sales in 2020 finished at 366,000 units, up 1.0% from the previous year. By engine capacity, whereas sales of Class 1 motor-driven cycles (50cc and under) fell 7.3% to 122,000 units and sales of Class 2 motor-driven cycles (51cc to 125cc) dipped 3.5% to 39,000 units, sales of mini-sized motorcycles (126cc to 250cc) dipping 1.4% to 54,000 units, and small-sized motorcycles (over 250cc) climbed 27.5% to 74,000 units and 1.4% to 67,000 units, respectively. Overall sales of motorcycles with engine capacity over 50cc totalled 244,000 units, an increase of 5.8% over 2019.

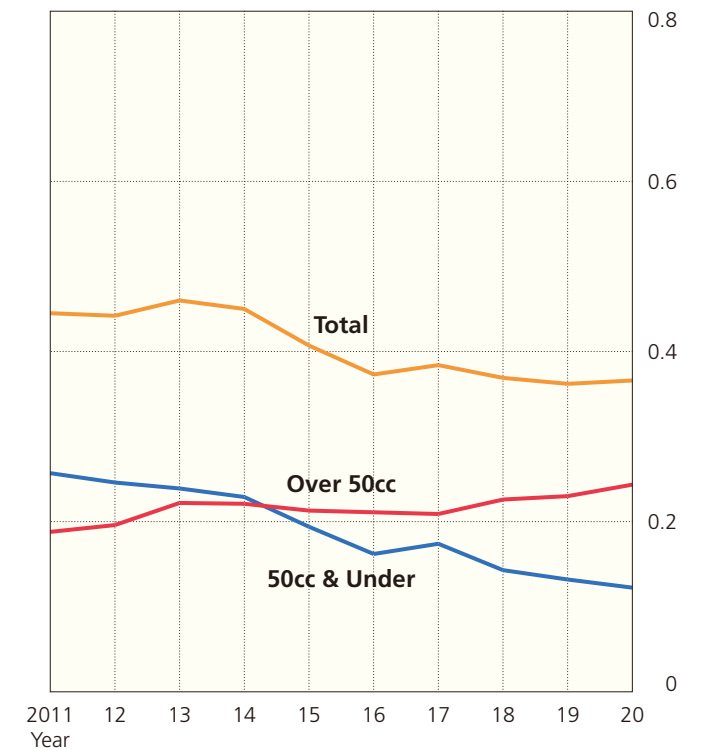
MOTORCYCLE SALES BY ENGINE CAPACITY IN 2020

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
2020	122,416	101,737	74,392	67,379	243,508	365,924	101.0

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).

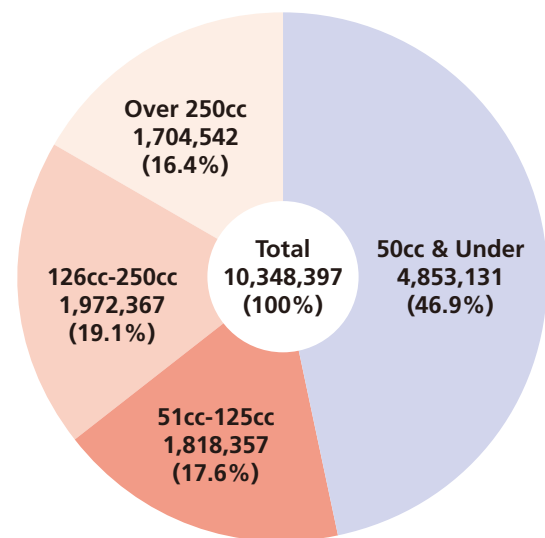
Sources: Japan Mini Vehicles Association; Japan Automobile Manufacturers Association

10.35 Million Motorcycles in Use

At March 31, 2020, motorcycles in use in Japan totalled 10.35 million units, down 1.8% from the previous year. By engine capacity, Class 1 motor-driven cycles, accounting for 46.9% of all motorcycles in use, dropped 4.9% to 4.85 million units in 2020, whereas Class 2 motor-driven cycles, mini-sized motorcycles, and small-sized motorcycles in use rose 1.7%, 0.2%, and 1.4% to 1.82 million units, 1.97 million units, and 1.71 million units, respectively. Thus, motorcycles over 50cc in use increased 1.1%, to a total of 5.50 million units.

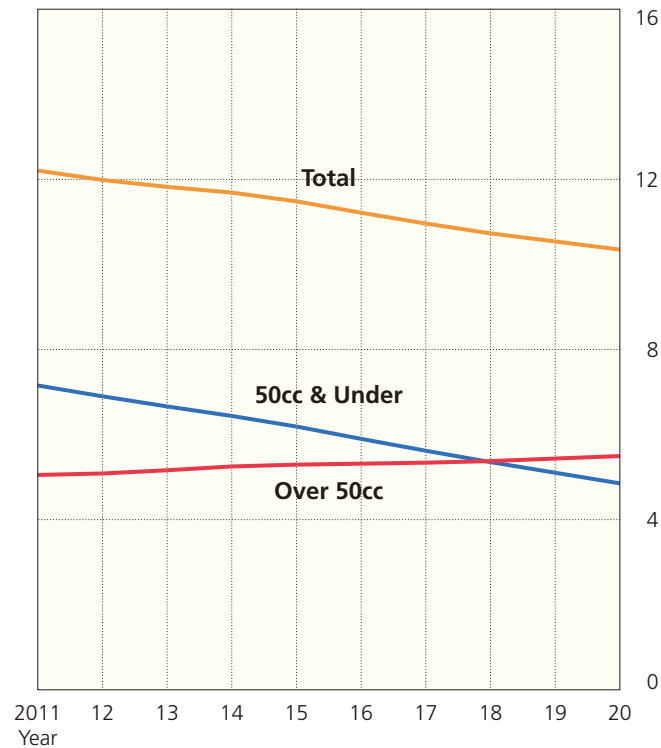
● MOTORCYCLES IN USE BY ENGINE CAPACITY (at March 31, 2020)

In vehicle units



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

x 1 million units



● MOTORCYCLES IN USE (at March 31 yearly)

In vehicle units

Year	Motor-Driven Cycles Class 1 (50cc & Under)	Over 50cc				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
2020	4,853,131	1,818,357	1,972,367	1,704,542	5,495,266	10,348,397	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).

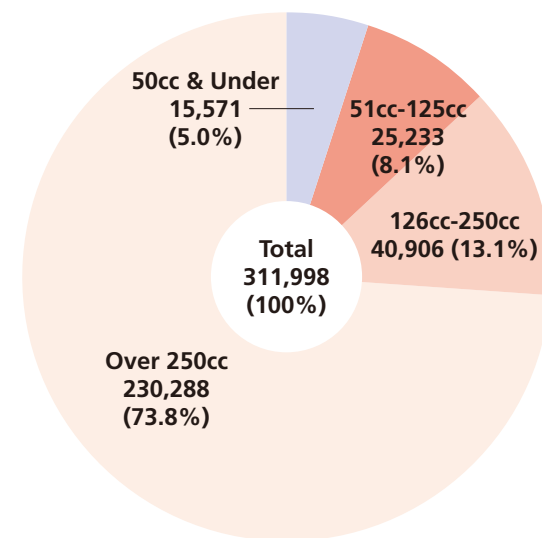
Sources: Ministry of Land, Infrastructure, Transport and Tourism; since 2006 (only for the 125cc-and-under categories), Ministry of Internal Affairs and Communications

Motorcycle Exports Total 312,000 Units

Motorcycle exports in 2020 decreased 21.3% from the previous year to 312,000 units. By engine capacity, Class 1 motor-driven cycles fell 3.4% to 16,000 units, mini-sized motorcycles dropped 15.7% to 41,000 units, and small-sized motorcycles shrank 25.1% to 230,000 units. Meanwhile, Class 2 motor-driven cycles rose 3.7% to 25,000 units.

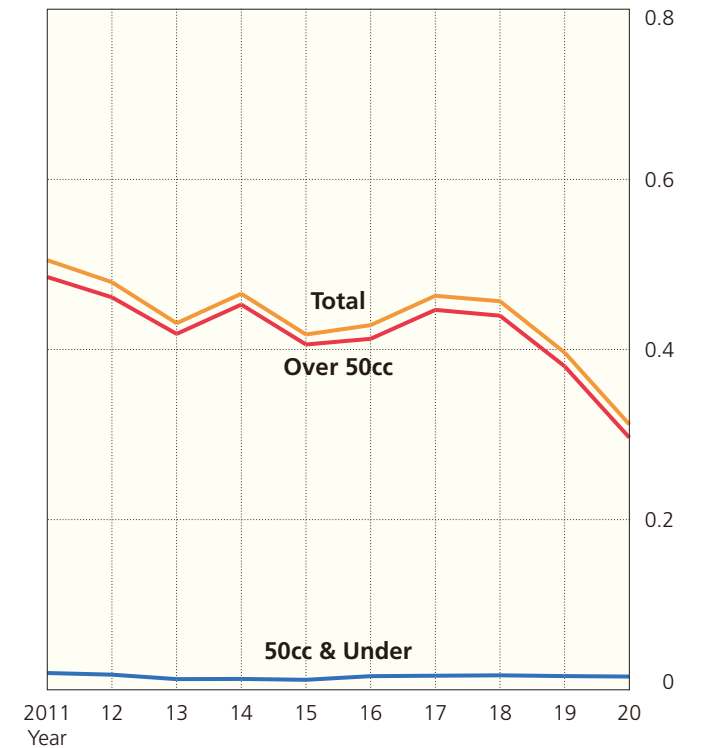
● MOTORCYCLE EXPORTS BY ENGINE CAPACITY IN 2020

In vehicle units



● TRENDS IN MOTORCYCLE EXPORTS

x 1 million units



● MOTORCYCLE EXPORTS

In vehicle units

Year	Motor-Driven Cycles Class 1 (50cc & Under)	Over 50cc				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
2020	15,571	25,233	40,906	230,288	296,427	311,998	78.7

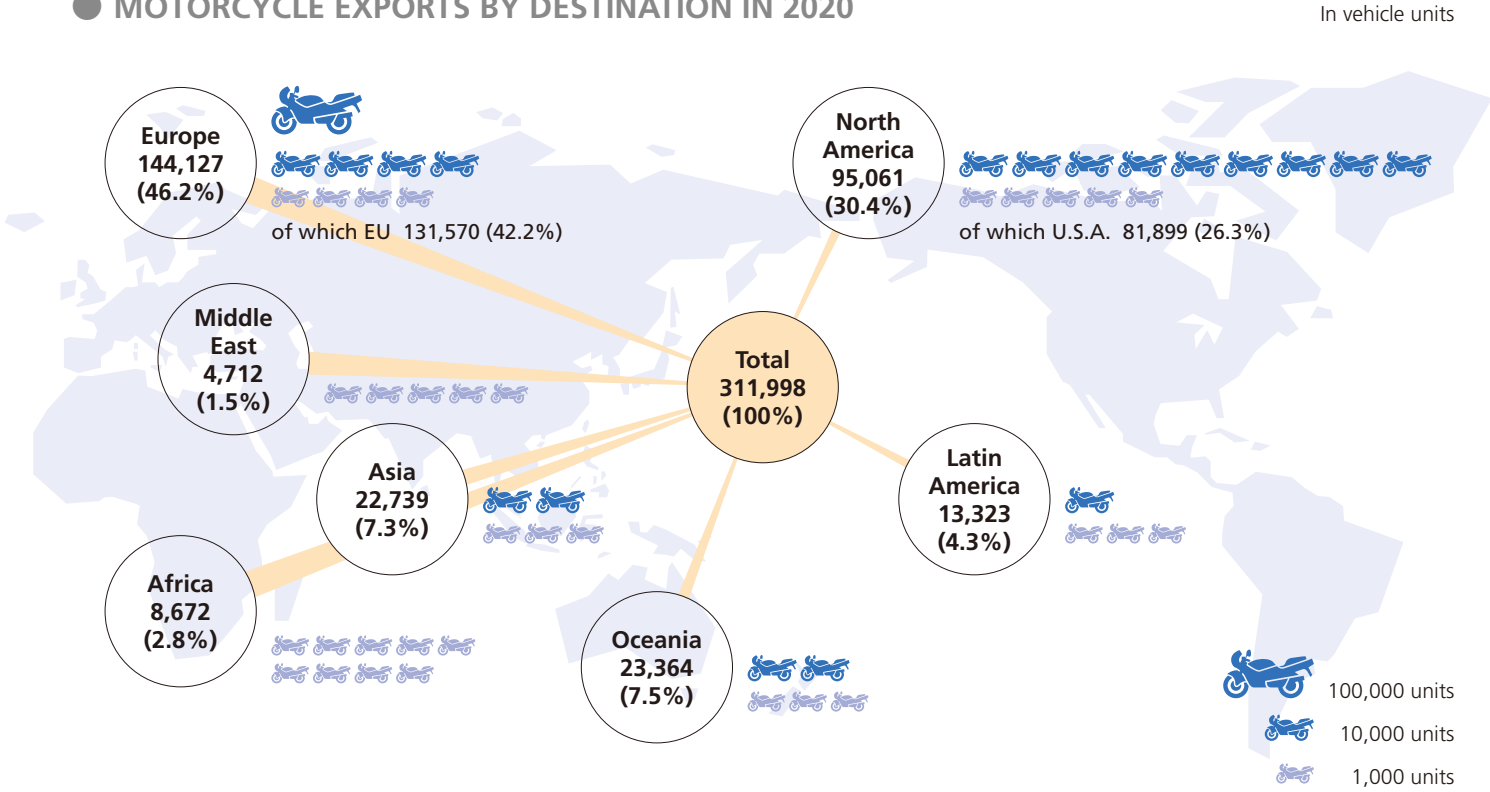
Notes: 1. Figures represent ex-factory export shipments of motorcycles manufactured in Japan. 2. Class 2 motor-driven cycles include three-wheeled motor-driven cycles. 3. KD sets have been excluded since 1979; they represent less than 60% of the cost of compositional components per vehicle and have been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

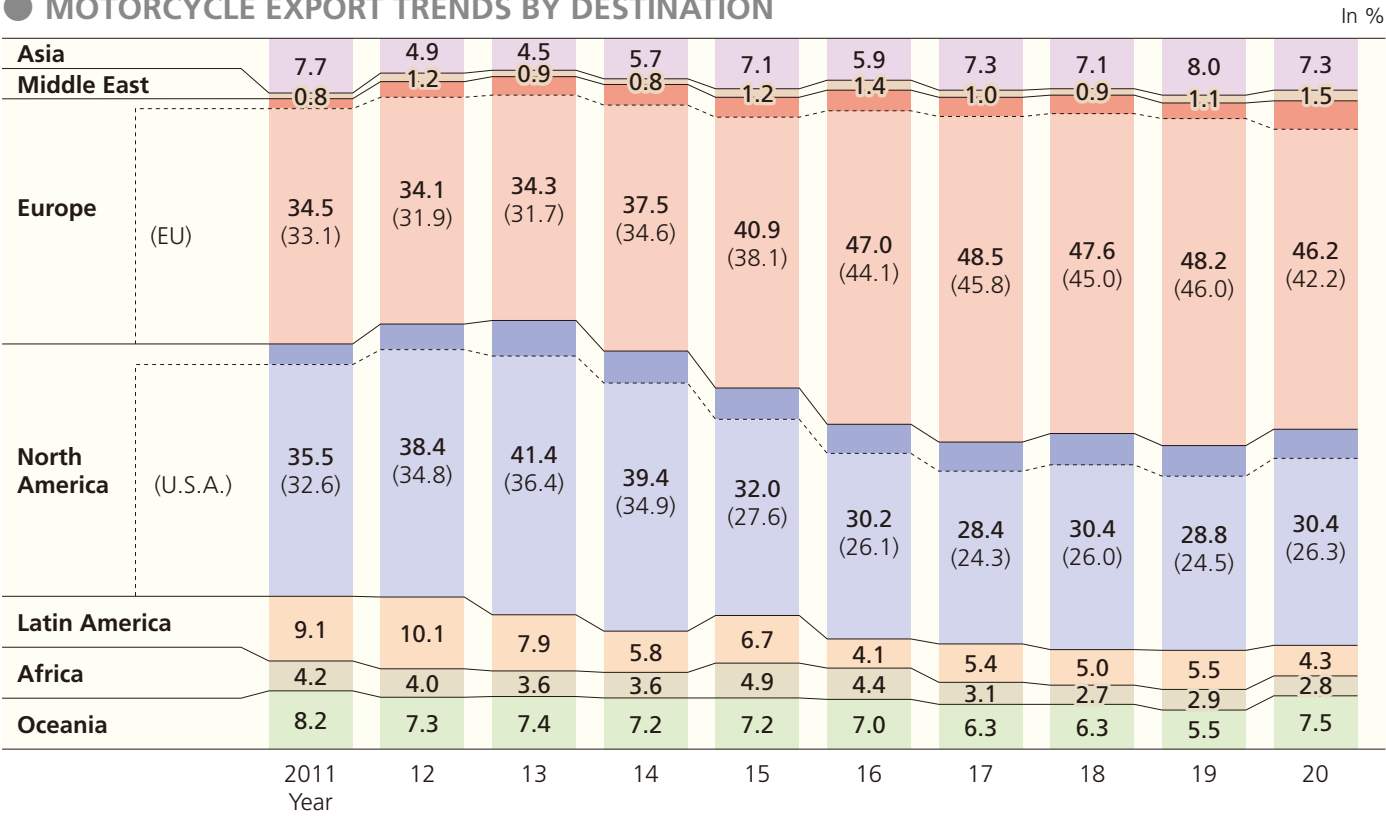
An Increase in Motorcycle Exports to Oceania and the Middle East

Compared to the previous year, motorcycle exports in 2020 increased to Oceania (23,000 units) and the Middle East (5,000 units), but decreased to Europe (144,000 units), North America (95,000 units), Asia (23,000 units), Latin America (13,000 units), and Africa (9,000 units).

MOTORCYCLE EXPORTS BY DESTINATION IN 2020



MOTORCYCLE EXPORT TRENDS BY DESTINATION



MOTORCYCLE EXPORTS BY DESTINATION & BY ENGINE CAPACITY IN 2020

In vehicle units

Destination	Motor-Driven Cycles Class 1 (50cc & Under)	Over 50cc				Total
		Motor-Driven Cycles Class 2 (51cc-125cc)	Mini-Sized Motorcycles (126cc-250cc)	Small-Sized Motorcycles (Over 250cc)	Subtotal	
Asia	South Korea	0	5	0	3,680	3,685
	China	0	0	0	6,562	6,562
	Taiwan	0	750	0	2,279	3,029
	Hong Kong	0	6	50	1,564	1,620
	Thailand	24	8	91	3,017	3,140
	Singapore	3	36	65	994	1,098
	Malaysia	0	0	0	1,500	1,500
	Philippines	24	5	13	1,217	1,259
	Indonesia	0	50	113	264	427
	Other	0	0	46	373	419
	Subtotal	51	860	378	21,450	22,739
Middle East	Saudi Arabia	24	36	32	705	797
	Israel	0	130	125	2,401	2,656
	United Arab Emirates	21	223	48	293	585
	Other	9	13	118	534	674
	Subtotal	54	402	323	3,933	4,712
Europe	Sweden	0	0	30	381	411
	Denmark	0	14	50	1,189	1,253
	UK	0	0	13	1,011	1,024
	Netherlands	0	429	1,807	26,503	28,739
	Belgium	0	0	125	1,245	1,370
	France	1,629	2,231	1,791	29,053	34,704
	Germany	600	702	916	17,091	18,709
	Portugal	0	0	0	461	461
	Spain	132	130	136	12,012	12,410
	Italy	123	712	1,026	21,606	23,344
	Poland	0	0	27	1,361	1,388
	Austria	0	0	79	2,670	2,749
	Hungary	0	13	30	1,117	1,160
	Greece	18	20	26	957	1,021
	Croatia	18	30	36	309	393
	Slovenia	54	80	134	568	782
	Other	0	0	191	684	875
	Subtotal	2,574	4,361	6,417	118,218	128,996
	Norway	0	0	9	503	512
	UK	0	0	256	4,493	4,749
	Switzerland	21	72	227	4,005	4,325
	Turkey	0	0	0	1,264	1,264
	Russia	30	58	64	1,302	1,424
	Other	0	0	0	253	253
	Subtotal	2,625	4,491	6,973	130,038	144,127
North America	Canada	789	1,449	2,862	8,062	12,373
	U.S.A.	8,624	9,995	20,349	42,931	73,275
	Subtotal	9,413	11,444	23,211	50,993	85,648
Latin America	Mexico	54	64	96	2,211	2,371
	Guatemala	3	10	66	103	182
	Panama	3	6	8	96	113
	Colombia	9	99	164	1,901	2,173
	Peru	0	0	6	68	74
	Chile	42	44	244	526	814
	Brazil	15	20	232	4,973	5,240
	Argentina	0	5	45	659	709
	Other	83	213	654	601	1,468
	Subtotal	209	461	1,515	11,138	13,323
Africa	Guinea	0	35	110	0	145
	Togo	0	984	347	0	1,331
	Mali	0	1,131	374	0	1,505
	Niger	0	655	612	0	1,267
	Dem Rep Congo	0	744	20	0	764
	Ethiopia	3	1	24	10	38
	Kenya	0	0	208	1	209
	Uganda	0	106	9	0	115
	South Africa	15	391	418	543	1,367
	Other	12	153	382	1,384	1,931
	Subtotal	30	4,200	2,504	1,938	8,672
Oceania	Australia	2,703	2,863	4,467	9,276	16,606
	New Zealand	474	506	1,472	1,456	3,434
	Other	12	6	63	66	147
	Subtotal	3,189	3,375	6,002	10,798	23,364
Grand Totals		15,571	25,233	40,906	230,288	296,427

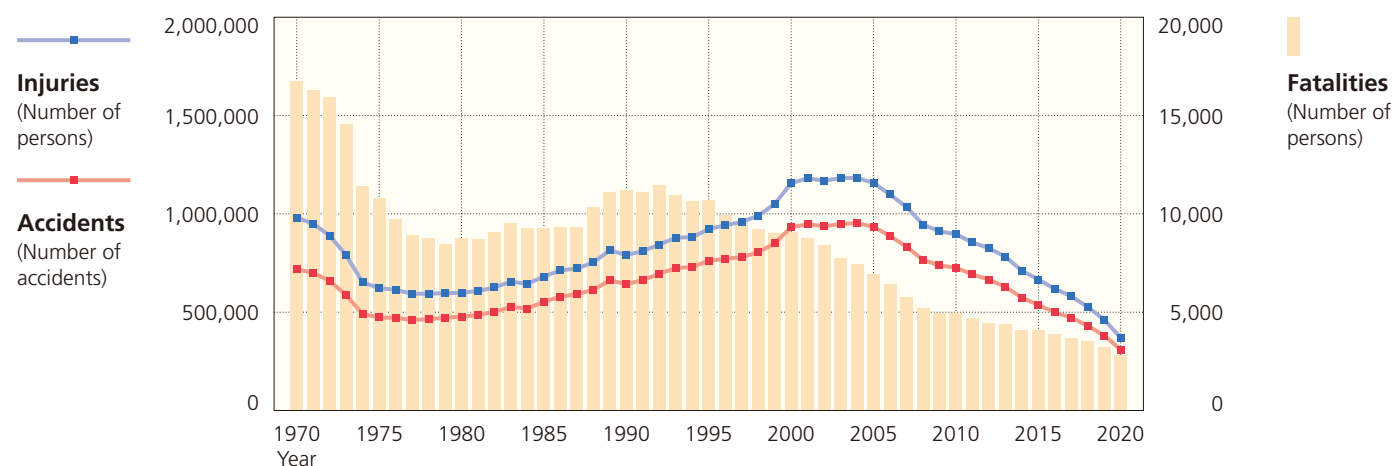
Note: The UK was counted as part of the EU for January, and as part of Europe from February onwards.

Source: Japan Automobile Manufacturers Association

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 promotional efforts (for the manufacturers' vehicle-based measures for increased active and passive safety, see page 14). JAMA works together with relevant government agencies and organizations on activities promoting greater road safety. In 2020 road fatalities (defined here as deaths occurring within 24 hours of accident occurrence) in Japan dropped to 2,839, the lowest number recorded since the start of road fatality data compilation by the National Police Agency in 1948. Road accidents and road injuries also declined, for the sixteenth consecutive year, to 309,178 and 369,476 (in number of persons), respectively; the injured included 27,774 people with serious injuries. Annual statistics show that while the road fatality rate per 100,000 persons continues to decline for the elderly demographic (ages 65 and older), that age group nevertheless accounts for a growing share—56.2% in 2020—of total road fatalities. Reducing the fatality rate among older road users therefore remains a pressing issue.

ROAD ACCIDENTS/INJURIES/FATALITIES

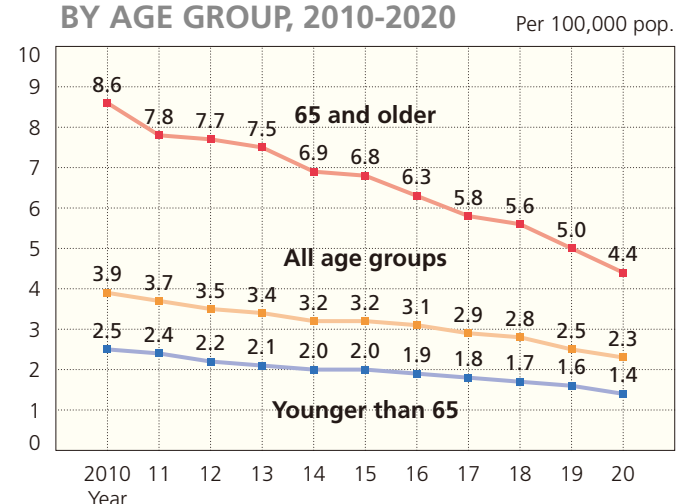


Year	Accidents	Injuries (Number of persons)	Fatalities (Number of persons)
1970	718,080	981,096	16,765
1975	472,938	622,467	10,792
1980	476,677	598,719	8,760
1985	552,788	681,346	9,261
1990	643,097	790,295	11,227
1995	761,794	922,677	10,684
2000	931,950	1,155,707	9,073
2005	934,346	1,157,113	6,937
2010	725,924	896,297	4,948

Year	Accidents	Injuries (Number of persons)	Fatalities (Number of persons)
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
2020	309,178	369,476	2,839

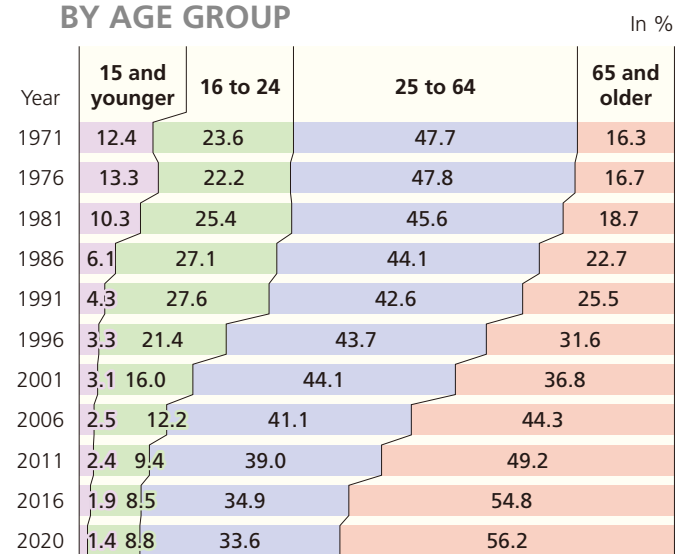
Source: National Police Agency

ROAD FATALITIES PER 100,000 PERSONS BY AGE GROUP, 2010-2020



Note: Total population figures used in calculating the above results are as at October 1 of the year preceding the year shown, except for the years in which the quinquennial national population census was conducted, in which case the total population figure obtained by the census was used.
Source: White Paper on Traffic Safety in Japan 2020, Cabinet Office

TRENDS IN ROAD FATALITIES BY AGE GROUP



Source: White Paper on Traffic Safety in Japan 2020, Cabinet Office

Widespread Application of Advanced Safety Vehicle Technologies

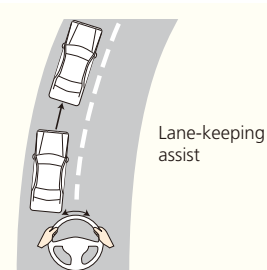
EXPANDING AVAILABILITY OF ASV TECHNOLOGIES IN THE MARKET

With the goal of supporting safe driving, the results of research conducted on the Advanced Safety Vehicle (ASV) concept have been used to develop a wide range of vehicle safety features, including lane-keeping assist systems, full-range adaptive cruise control systems and collision-mitigation braking systems. Most of these advanced technologies have already been introduced to the market (see page 14 for details on the status of their onboard installation).

PRACTICAL APPLICATION OF ASV TECHNOLOGIES

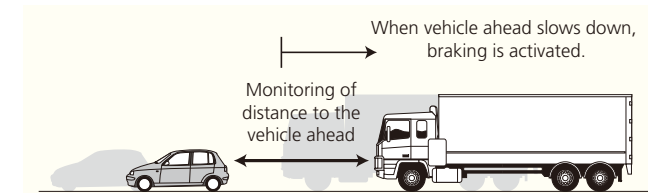
1. Lane-Keeping Assist

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



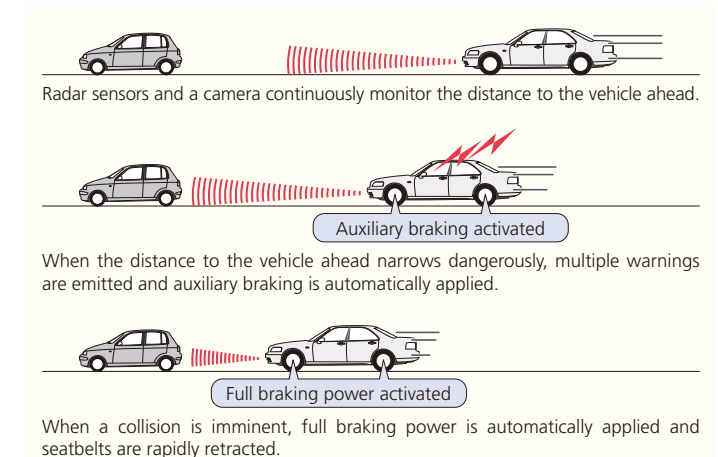
2. Full-Range Adaptive Cruise Control

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



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



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



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.	
 Passenger cars equipped with collision-mitigation braking systems; suitable for all drivers	 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, 95.8% of the totality of passenger cars produced in 2020 for the domestic market were equipped with forward collision-mitigation braking systems (including those for low-speed vehicle operation) and 90.8% 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 2020 for home market)

	Safety Feature	Installation Status			
		In no. of models (1)		In vehicle units	
Active Safety	Brake assist	176	(176)	98.9	3,463,187
	Unfastened seatbelt warning (front passenger's seat)	138	(131)	77.5	2,873,716
	Power-window jamming prevention (with auto-up function)	176	(175)	98.9	3,457,482
	Power-window jamming prevention (without auto-up function)	32	(32)	18.0	573,010
	High-intensity discharge headlamps	172	(104)	96.6	2,729,409
	Adaptive front-lighting system (AFS)	35	(22)	19.7	275,819
	Backing-up monitoring (rear obstacle detection)	146	(61)	82.0	2,288,100
	Vehicle perimeter monitoring	94	(16)	52.8	1,184,168
	Vehicle perimeter obstacle warning	105	(49)	59.0	1,990,345
	Blind-corner monitoring	77	(13)	43.3	868,912
	Curve detection	27	(10)	15.2	232,310
	Tire pressure monitoring	28	(19)	15.7	75,990
	Driver inattention warning	113	(64)	63.5	1,464,230
	Inter-vehicle distance warning	159	(109)	89.3	3,282,669
	Lane departure warning	159	(111)	89.3	3,308,395
	Forward collision-mitigation braking system	161	(115)	90.4	3,317,492
	Forward collision-mitigation braking system (for low-speed vehicle operation)	3	(10)	1.7	4,805
	Accelerator suppression for pedal misapplication	146	(65)	82.0	3,148,605
	Adaptive cruise control	87	(64)	48.9	1,680,806
	Adaptive cruise control with low-speed following mode	66	(44)	37.1	1,159,018
	Full-range adaptive cruise control	78	(42)	43.8	1,131,638
	Lane-keeping assist	86	(51)	48.3	1,586,071
	Backing-up monitoring (parking assistance)	23	(0)	12.9	216,118
	Navigator-based gearshift control	14	(4)	7.9	60,773
	Pre-crash seatbelts	6	(3)	3.4	7,646
	Electronic stability control	178	(178)	100.0	3,468,761
	Traction control with anti-lock braking system	162	(162)	91.0	2,978,265
	Rearward-approaching-vehicle warning	72	(26)	40.4	793,198
	Emergency braking warning	157	(146)	88.2	3,242,288
	Vehicle proximity warning (for HVs/EVs) (3)	71	(66)	62.3	956,014
	Automatic high-to-low-beam headlamp control	141	(78)	79.2	2,778,327
	Glare-free high beam headlamp control	45	(8)	25.3	698,214
	Backing-up monitoring (moving-object warning)	80	(28)	44.9	904,731
	Backing-up collision-mitigation braking system	28	(9)	15.7	358,225
	Vehicle perimeter-based collision-mitigation braking system (for low-speed operation)	59	(18)	33.1	1,507,645
	Rear collision-mitigation braking system	89	(37)	50.0	2,085,650
	Lane departure prevention	100	(71)	56.2	2,054,495
Passive Safety	Side airbags	161	(107)	90.4	2,455,550
	Curtain airbags	156	(105)	87.6	2,295,509
	Active head restraints	145	(144)	81.5	2,909,873
	i-Size child car seats	82	(80)	46.3	1,911,956
	J-EDR (Japanese regulation-compliant event data recorders)	104	(104)	58.4	2,082,947
	Automatic collision notification (ACN)	40	(31)	22.5	681,213
	Advanced automatic collision notification (AACN)	65	(36)	36.5	956,262
Total		178		3,468,762	

(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 2020 a total of 114 hybrid/electric car models (1,896,766 vehicle units) were produced.

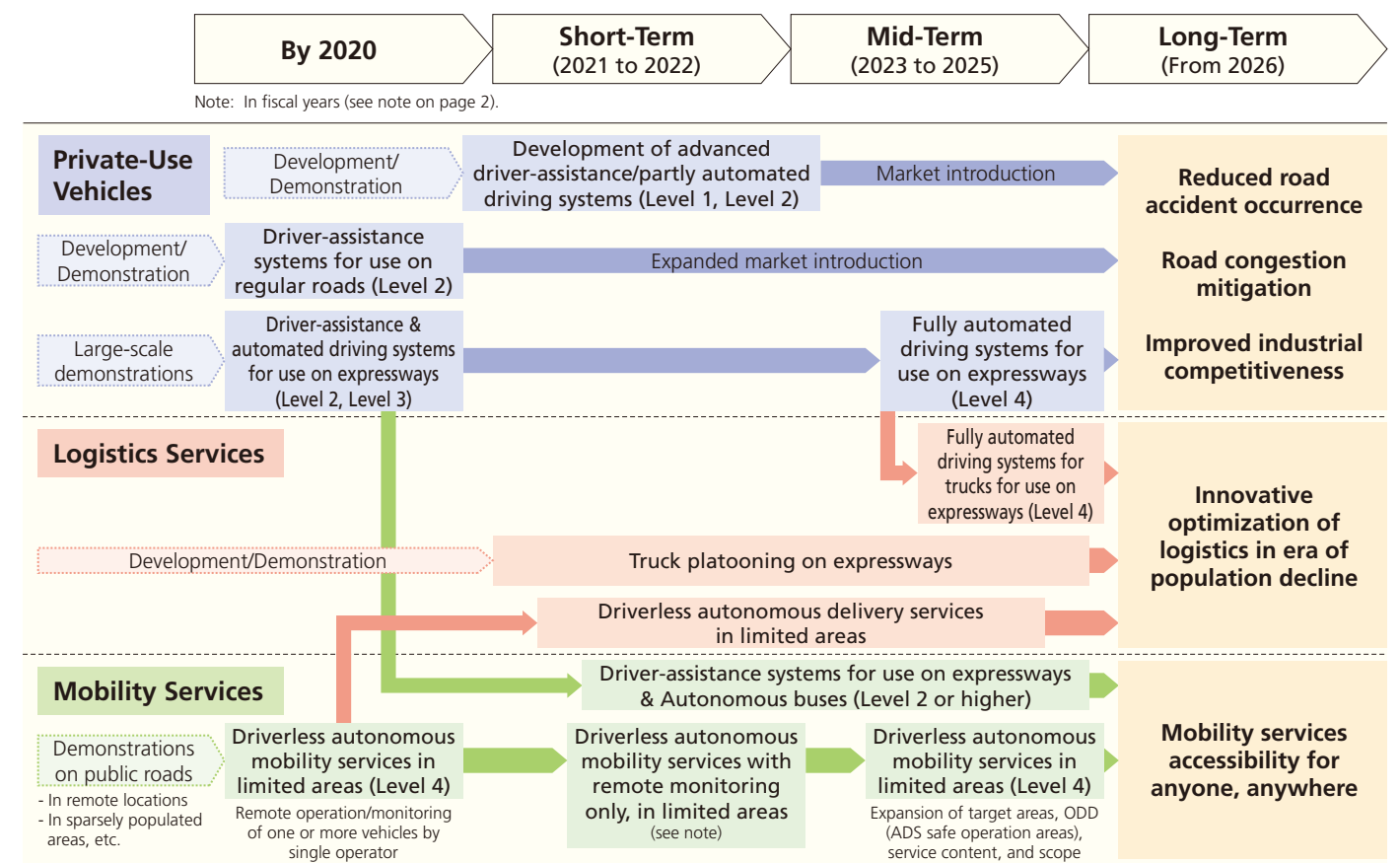
Notes: 1. Passenger cars here include minicars. 2. Criteria for inclusion in the calculations whose results are shown here were revised in 2015.

Source: Japan Automobile Manufacturers Association

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, expand their use in freight transport, and promote the introduction of driverless autonomous mobility services by 2025. JAMA is actively participating in the initiatives being undertaken for the practical use of automated driving technologies.

● INITIATIVES PROMOTING THE COMMERCIALIZATION OF AUTOMATED DRIVING SYSTEMS AND THE INTRODUCTION OF AUTONOMOUS MOBILITY SERVICES

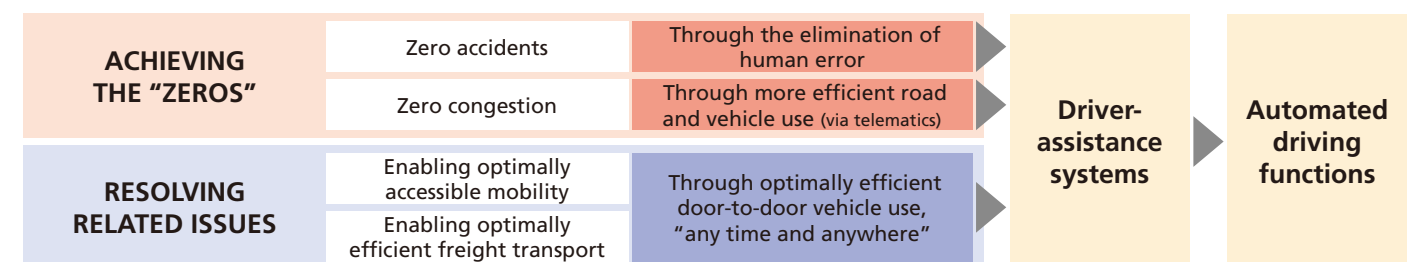


Note: Factors to be taken into account when planning the provision of such services include local climate and road conditions and it will be the responsibility of the government authorities concerned to establish the criteria enabling the determination of when and where such services can be safely and effectively introduced.

Source: The Public-Private ITS Initiative/Roadmaps policy initiative

● 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.



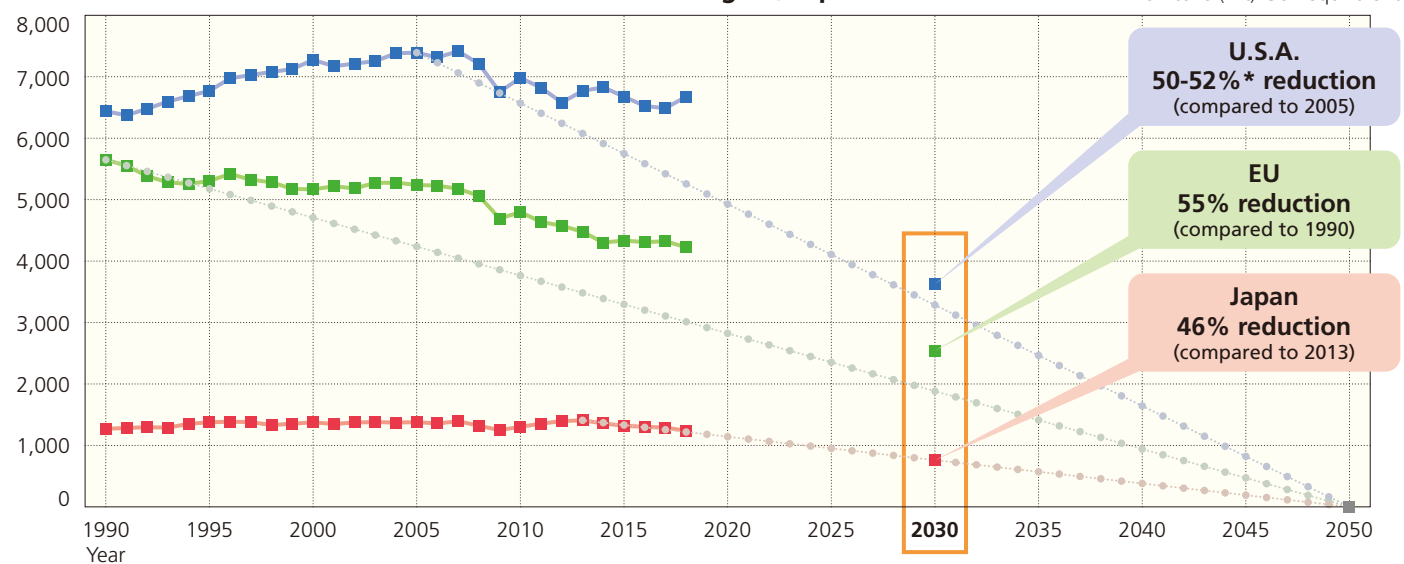
Striving to Reach Net-Zero

The Japanese government has declared the country's intention to achieve carbon neutrality (CN) by 2050. As part of this effort, one goal is to raise the share of electrified (i.e., electric or partially electric) vehicles in annual new passenger car sales in the domestic market to 100% by 2035, and comprehensive steps are being taken accordingly. Japan's automotive industry is engaging with CO₂ reduction efforts being rapidly deployed globally and is working vigorously towards the "net zero CO₂ emissions" target.

THE WORLDWIDE SHIFT TOWARDS CARBON NEUTRALITY

Governments around the world must reduce greenhouse gas (GHG) emissions in order to limit global warming within this century to "well below 2°C and preferably to 1.5°C" compared to pre-industrial levels, as called for by the Paris Agreement, the international treaty on climate change adopted in December 2015. Moreover, a special report released by the Intergovernmental Panel on Climate Change (IPCC) in 2018 on "Global Warming of 1.5°C" affirmed that carbon neutrality must be achieved by around 2050 in order to keep the global temperature rise to within 1.5°C above pre-industrial levels. Against this backdrop, there is growing international momentum to achieve carbon neutrality as more and more countries and regions establish increasingly ambitious CN targets.

GHG Emissions: Actual Trends and 2030 Reduction Targets, Japan/U.S.A./EU



	Actual Trends (2018 data)				2030 Reduction Targets					
	Emissions (x 1 Mt CO ₂ equiv)	Emissions per capita (x 1 t CO ₂ equiv)	2018/1990 reduction rate	2018/2013 reduction rate	Baseline year (self-established)	Reduction rate target	Calculated relative to 1990	Calculated relative to 2005	Calculated relative to 2013	Reduction amount required, 2018-2030
Japan	1,238	9.8	-2%	-12%	2013	-46%	-40%	-45%	-46%	-34%
U.S.A.	6,677	20.4	+4%	-1%	2005	-50 to 52%	-44%	-51%*	-46%	-45%
EU	4,224	9.5	-25%	-6%	1990	-55%	-55%	-51%	-43%	-38%

*"50-52%" has been calculated as 51%.

Sources: Greenhouse gas inventories, National Institute for Environmental Studies; World Development Indicators (WDI), World Bank

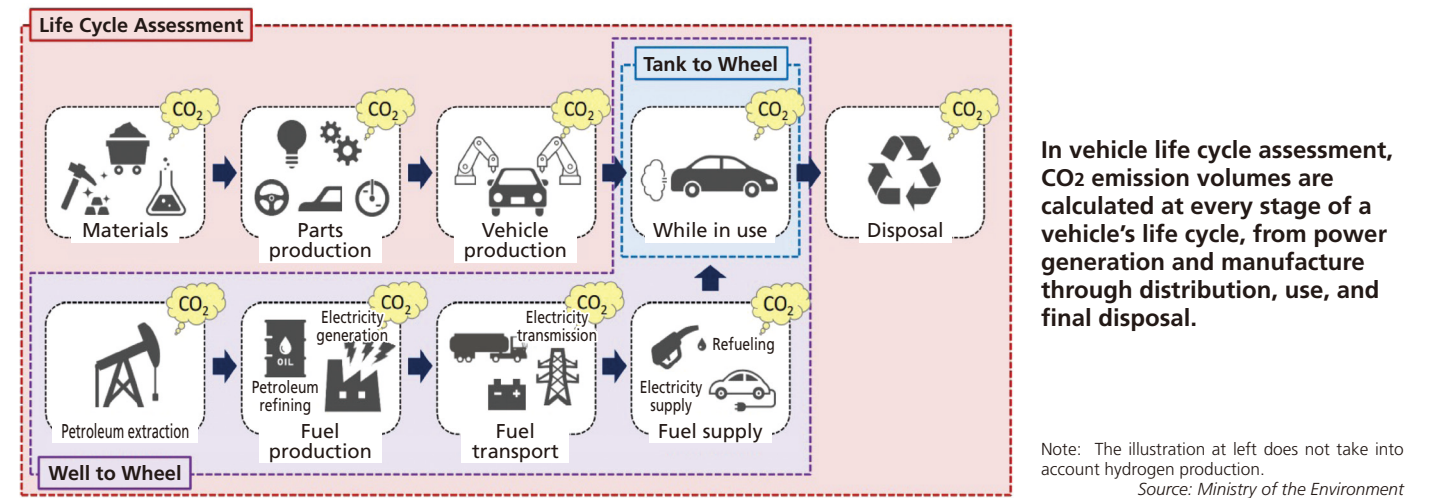
CARBON NEUTRALITY TARGET YEARS & RELATED GOVERNMENT STATEMENTS, JAPAN/U.S.A./EU

	Target Year	Related Statement
Japan	2050 (as declared in Prime Minister Suga's policy speech on October 26, 2020)	"My administration will devote itself to the greatest possible extent to bring about a green society, while focusing on a virtuous cycle of the economy and the environment as a pillar of our growth strategy. [...] Addressing climate change is no longer a constraint on economic growth. We need to adjust our mindset to a paradigm shift [so] that proactive climate change measures bring transformation of industrial structures as well as our economy and society, leading to dynamic economic growth." - Extract from policy speech by Prime Minister Yoshihide Suga to the 203rd session of the Diet, October 26, 2020
U.S.A.	2050 (as declared in candidate Joseph Biden's July 2020 campaign pledge)	"Today, President Biden will [issue an Executive Order] to tackle the climate crisis at home and abroad while creating good-paying union jobs and equitable clean energy future, building modern and sustainable infrastructure, [and] restoring scientific integrity and evidence-based policymaking across the federal government. [...] The order clearly establishes climate considerations as an essential element of U.S. foreign policy and national security." - Extract from "Fact Sheet" issued by White House Briefing Room, January 27, 2021
EU	2050 (EU Long-Term Strategy submission, March 2020)	"The European Green Deal will transform the EU into a modern, resource-efficient and competitive economy, ensuring: • no net emissions of greenhouse gases by 2050 • economic growth decoupled from resource use • no person and no place left behind." - Extract from "A European Green Deal" issued December 11, 2019

Source: Agency for Natural Resources and Energy

LIFE CYCLE ASSESSMENT

Life cycle assessment (LCA) is a methodology for quantitatively calculating the environmental impacts of a product (or process or service) throughout its entire life cycle, from the initial procurement of raw materials through product disposal. Although electric vehicles and fuel cell vehicles, for example, emit no CO₂ when driven, carbon is emitted in the generation of electricity and the production of hydrogen which they use, respectively, as fuel; and carbon emissions are also produced during their manufacture, distribution, recycling, and disposal at the end of their service life. LCA thus makes possible the reduction of CO₂ emissions at every stage of a vehicle's life cycle, without which carbon neutrality with respect to motor vehicles cannot be achieved.



VEHICLE USERS AND CARBON NEUTRALITY: CONSUMER OPTIONS IN JAPAN

Life cycle assessment calculations have determined that, because the supply of renewable energy in Japan is for the time being limited, there is not a wide disparity in CO₂ emissions tallies for hybrid vehicles (HVs), electric vehicles (EVs), and fuel cell vehicles (FCVs) over their entire life cycles. The widespread use of electric vehicles will help expedite the achievement of carbon neutrality, but it is crucial that consumer preferences be taken into account. At present, the vehicle market in Japan offers consumers a wide range of electrified models, enabling consumers to make the vehicle purchasing choices that best suit their needs.

HVs (Hybrid vehicles)	PHVs (Plug-in hybrid vehicles)	EVs (Electric vehicles)	FCVs (Fuel cell vehicles)
Long travel range, more affordable than PHVs and EVs	Long travel range, more affordable than EVs; a PHV is an EV for daily use.	Zero CO ₂ emissions if powered by renewable energy; chargeable at home	Long travel range, rapidly refuelable

CURRENT STATUS OF ELECTRIFIED PASSENGER VEHICLE ADOPTION & JAPAN'S TARGETS FOR 2030

Electrified vehicles (HVs/PHVs/EVs/FCVs) accounted for 36% of new passenger car sales in Japan in 2020. For 2030, the Japanese government has established a target of 50 to 70% of new passenger car sales for so-called next-generation vehicles (HVs/PHVs/EVs/FCVs and clean diesel vehicles).

Status of Electrified Passenger Vehicle Adoption: International Comparisons (2020)

Country	Market Share (%)*	In Vehicle Units
Norway	83%	120,000
Iceland	58%	5,000
Japan	36%	1.35 million
Germany	25%	720,000
France	22%	360,000
China	7%	1.49 million
U.S.A.	5%	750,000

*Market share = Share of new passenger vehicle sales

Sources: Japan Automobile Dealers Association; Japan Mini Vehicles Association; European Automobile Manufacturers Association (ACEA); China Association of Automobile Manufacturers (CAAM); Ward's

Next-Generation Vehicles in Japan's New Passenger Car Market: Current (2020) & Target (2030) Shares

	2020 In % (In vehicle units)	2030 In %
Conventional vehicles	60.58% (2.31 million)	30 to 50%
Next-Generation Vehicles	39.42% (1.50 million)	50 to 70%
Hybrid vehicles	34.77% (1.32 million)	30 to 40%
Plug-in hybrid vehicles	0.39% (15,000)	20 to 30%
Electric vehicles	0.38% (15,000)	
Fuel cell vehicles	0.02% (800)	Approx. 3%
Clean diesel vehicles	3.86% (147,000)	5 to 10%

Note: Targets shown here were established by the Japanese government.

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

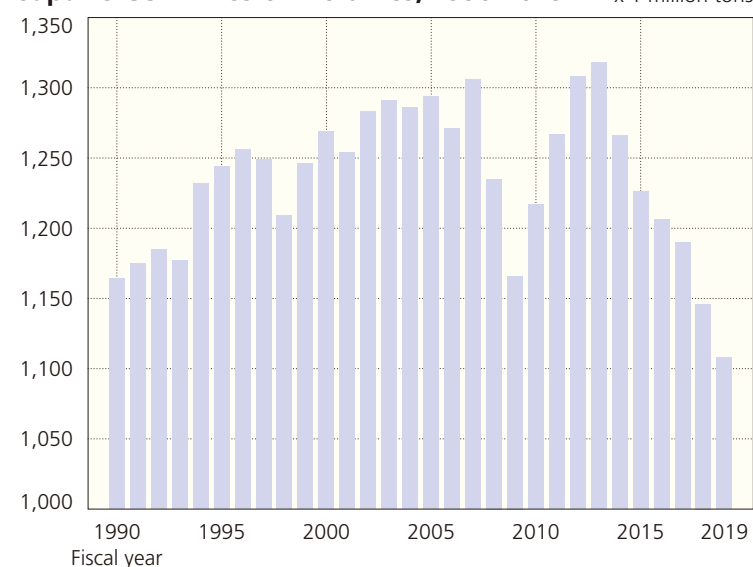
Climate Change and CO₂ Emissions Reduction: The Response of the Transport Sector

In 2019 Japan's CO₂ emissions totalled 1.11 billion tons (actual figure), of which the transportation sector accounted for nearly 19%. Since peaking in 2001 following a decade of growth, CO₂ emission volumes in Japan's transport sector have steadily declined, owing largely to increased fuel efficiency in passenger cars and greater efficiency in goods distribution. The automobile industry will continue to vigorously promote CO₂ emissions reduction in road transport by further improving vehicle fuel efficiency and expanding the market supply of next-generation vehicles.

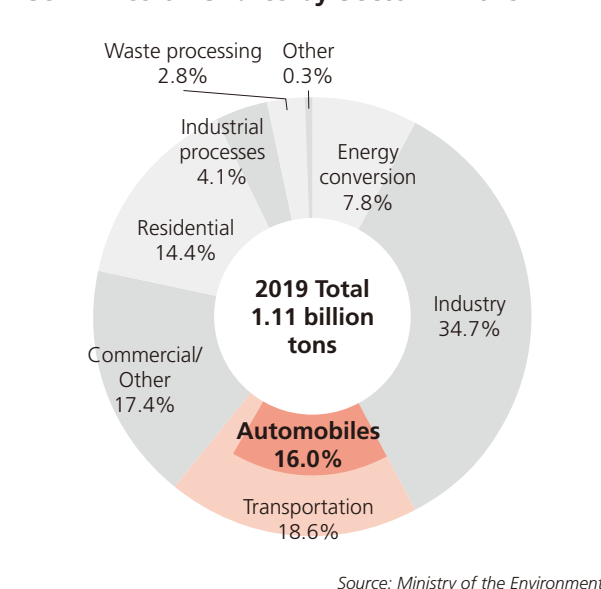
CO₂ EMISSIONS IN JAPAN

The transportation sector accounts for nearly 19% of Japan's total CO₂ emissions, which in 2019 amounted to 1.11 billion tons (actual figure).

Japan's CO₂ Emission Volumes, 1990-2019 x 1 million tons

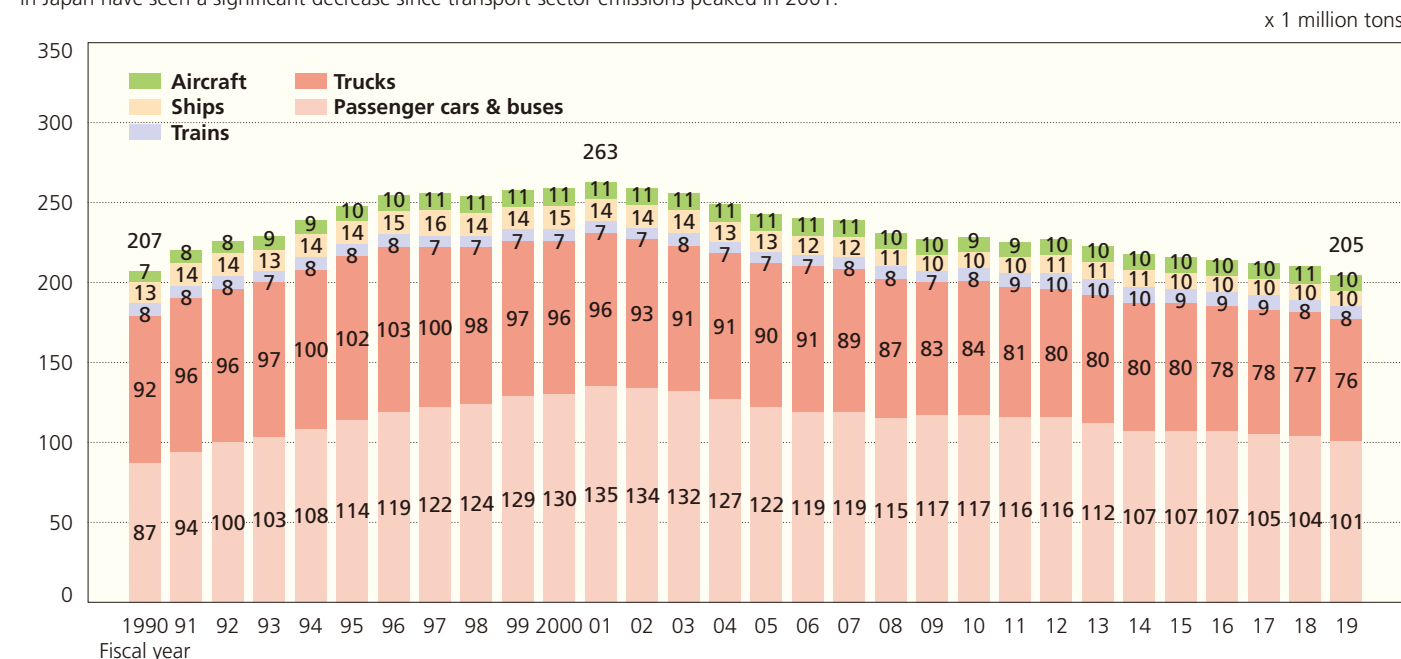


CO₂ Emission Shares by Sector in 2019



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

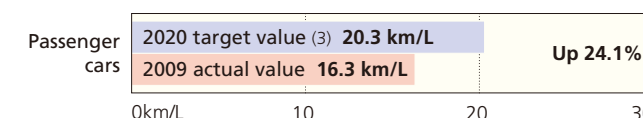
Motor vehicle-emitted CO₂ accounts for about 86% of the totality of CO₂ emitted by Japan's transport sector. CO₂ emissions from road transportation in Japan have seen a significant decrease since transport-sector emissions peaked in 2001.



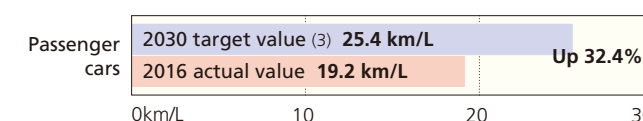
CO₂ Emissions Reduction: Improving Vehicle Fuel Efficiency

Fuel efficiency targets for passenger cars, trucks, and buses are formulated by applying "top runner" criteria whereby the target value for a given vehicle weight category is established based on the leading fuel efficiency performance to date for that weight category. To comply, 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)

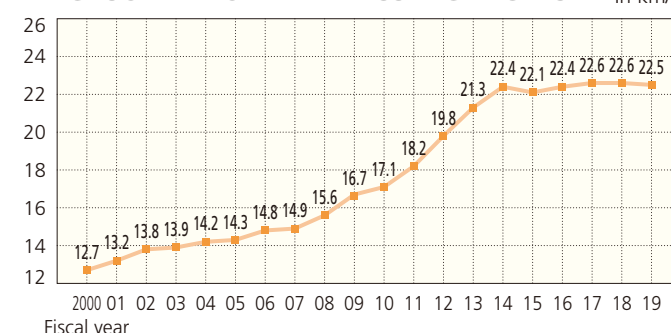


2030 AVERAGE FUEL EFFICIENCY TARGET FOR NEW PASSENGER CARS (2)

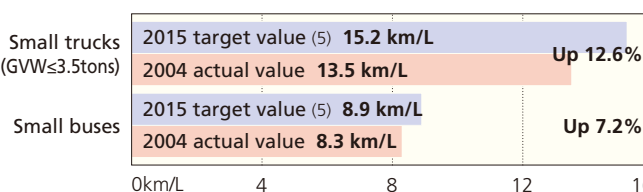


(1) Fuel efficiency is JC08 test cycle-based (see page 19). (2) Fuel efficiency is WLTC-based (see page 19). (3) Targets were established assuming the same shipment volume ratios by vehicle weight category for target years as those recorded in the years showing the actual value of fuel efficiency performance. Sources: Ministry of Economy, Trade and Industry; Ministry of Land, Infrastructure, Transport and Tourism

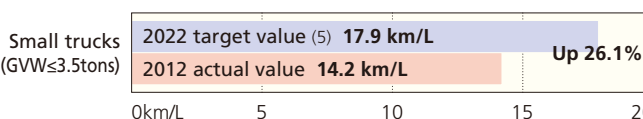
AVERAGE FUEL EFFICIENCY OF DOMESTIC NEW GASOLINE-POWERED PASSENGER CARS In km/L



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

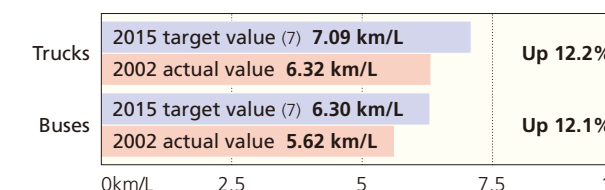


2022 AVERAGE FUEL EFFICIENCY TARGET FOR NEW SMALL TRUCKS (4)

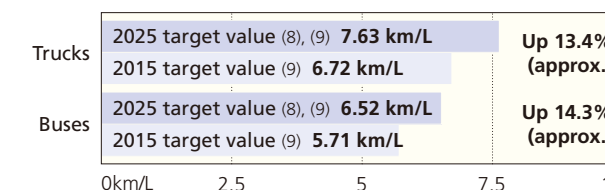


(4) Fuel efficiency is JC08 test cycle-based (see page 19). (5) Targets were established assuming the same shipment volume ratios by vehicle weight category for target years as those recorded in the years showing the actual value of fuel efficiency performance. Sources: Ministry of Economy, Trade and 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

Improved engine efficiency

More efficient fuel consumption:

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

Reduction of friction loss:

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

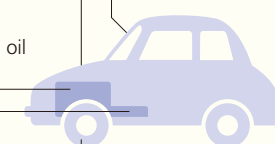
Reduced aerodynamic drag

– Improved body configuration

Reduced vehicle weight

– Expanded use of lightweight materials

– Improved body structure



Improved powertrain performance

– Expansion of lock-up area

– Expanded number of transmission gears

– Continuously variable transmission

Reduced rolling resistance

– Low rolling-resistance tires

Other

– Electric power steering

– Idling prevention (stop-start)

In-Use Status of Next-Generation Vehicles

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 2020 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, 2008-2020

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
2020	1,324,803	14,680	14,574	761	147,139	1,501,957

Source: Japan Automobile Manufacturers Association

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

In %

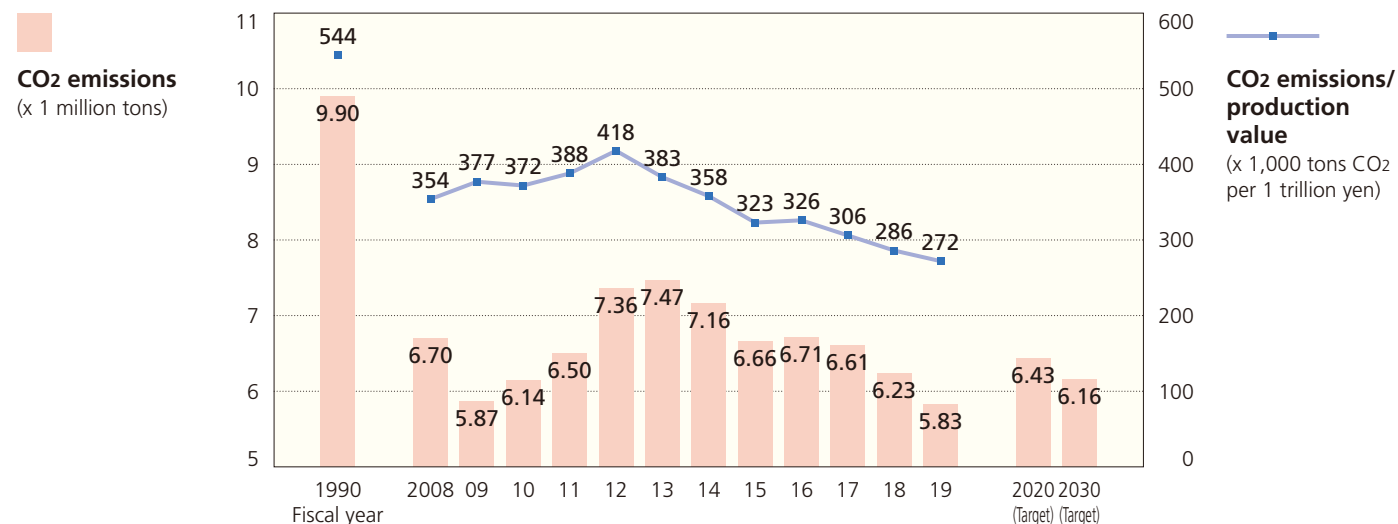


Source: Japan Automobile Manufacturers Association

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 CO₂ emissions at their production plants. Having more recently expanded their voluntary CO₂ reduction activities to also include administrative and research facilities, their combined facility-emitted CO₂ in 2019 totalled 5.83 million tons (preliminary figure), down 400,000 tons from the previous year and surpassing not only the 2020 target established by JAMA and JABIA members in 2016 of 6.43 million tons (a 35% reduction from the 1990 level), but also the target they subsequently established of 6.16 million tons (a 38% reduction from 1990) by 2030.

● FACILITY-GENERATED CO₂ EMISSION VOLUMES, 1990-2019



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

A Voluntary Approach to Reducing Vehicle Cabin VOCs

New-model passenger cars marketed in and after 2007 and new-model commercial vehicles sold in and after 2008 have met the target values established 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
Formaldehyde	100 $\mu\text{g}/\text{m}^3$ (0.08 ppm)	Adhesives for plywood, wallpaper, etc.
Toluene	260 $\mu\text{g}/\text{m}^3$ (0.07 ppm)	Adhesives/paints for interior finishing materials, furniture, etc.
Xylene	870 $\mu\text{g}/\text{m}^3$ (0.20 ppm)	Adhesives/paints for interior finishing materials, furniture, etc.
Paradichlorobenzene	240 $\mu\text{g}/\text{m}^3$ (0.04 ppm)	Moth repellents, lavatory air fresheners
Ethylbenzene	3,800 $\mu\text{g}/\text{m}^3$ (0.88 ppm)	Adhesives/paints for plywood, furniture, etc.
Styrene	220 $\mu\text{g}/\text{m}^3$ (0.05 ppm)	Insulation materials, bath units, tatami-mat core materials
Chlorpyrifos	1 $\mu\text{g}/\text{m}^3$ (0.07 ppb)	Insecticides (esp. ant exterminators)
Di-n-butyl phthalate	220 $\mu\text{g}/\text{m}^3$ (0.02 ppm)	Paints, pigments, adhesives
Tetradecane	330 $\mu\text{g}/\text{m}^3$ (0.04 ppm)	Kerosene, paints
Di-2-ethylhexyl phthalate	120 $\mu\text{g}/\text{m}^3$ (7.6 ppb)	Wallpaper, flooring materials, wire-coating materials
Diazinon	0.29 $\mu\text{g}/\text{m}^3$ (0.02 ppb)	Pesticides
Acetaldehyde	48 $\mu\text{g}/\text{m}^3$ (0.03 ppm)	Adhesives for construction materials, wallpaper, etc.
Fenobucarb	33 $\mu\text{g}/\text{m}^3$ (3.8 ppb)	Insecticides (esp. termite exterminators)

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 2019 the volume of auto plant-generated waste destined for landfill disposal totalled 400 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	ELV Recycling Basic premise: - Environmentally responsible vehicle design on the part of automobile manufacturers
“Reuse” initiatives	For designated products (2): - Use of reusable/recyclable materials		
“Recycle” initiatives	- Ease of dismantling - Ease of sorting - Non-hazardous recycling - Materials identification	- Total waste volume:* 1990 (baseline): 352,000 tons ↓ 2019: 400 tons JAMA target: 1,000 tons by fiscal 2020 *For landfill disposal, including scrap metals, casting sand residue, and other waste	- Recovery and recycling of: 1) Fluorocarbons 2) Airbags 3) ASR Note: Motorcycles are not covered by the ELV Recycling Law.

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

ELV RECOVERY IN NUMBERS

Fiscal Year		2019 (Actual)	2020 (Preliminary)
No. of ELVs recovered		3,362,852	3,146,948
Appropriate recovery of three designated items	Fluorocarbons	2,935,343	2,778,982
	Airbags (1)	2,832,656	2,694,961
	ASR (2)	3,267,706	3,025,343

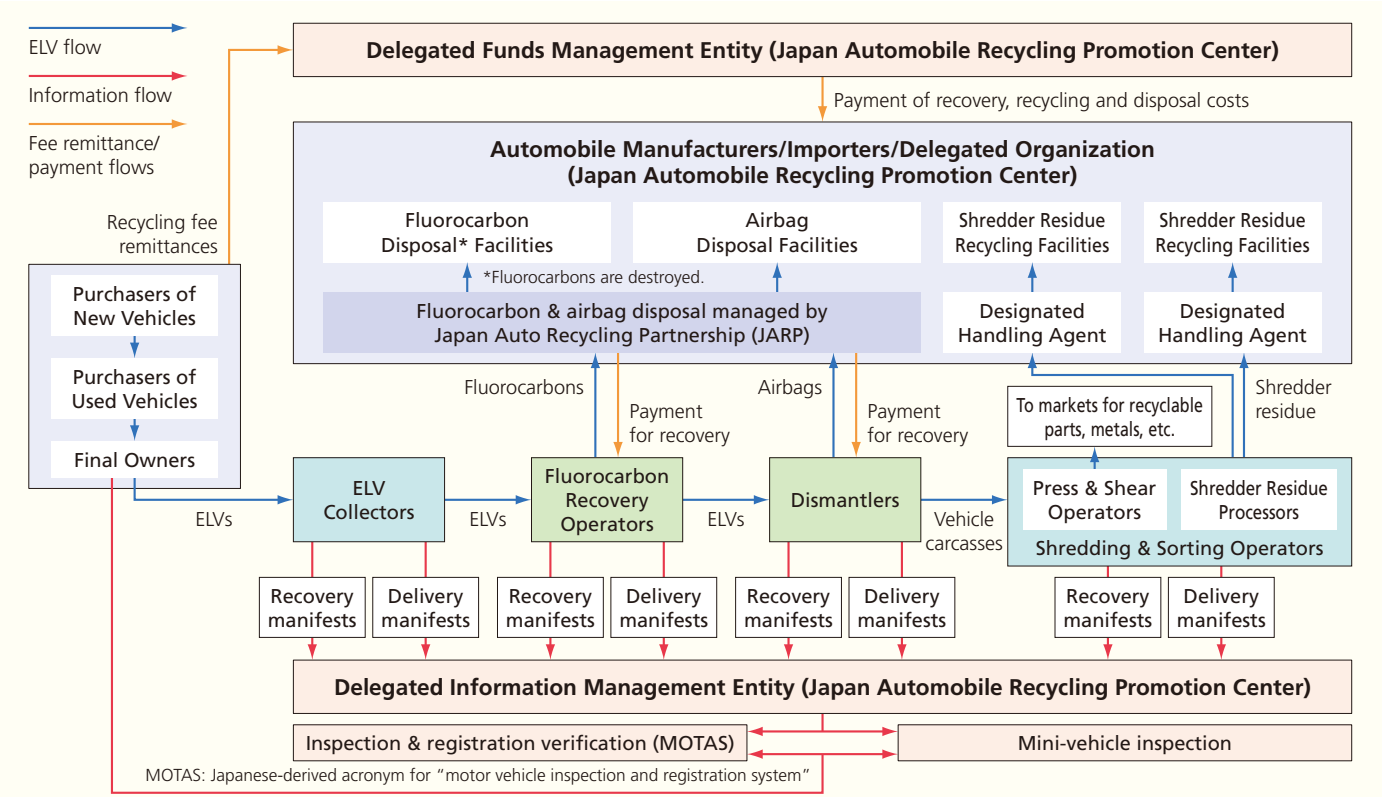
(1) Through recovery/appropriate disposal of inflators or through onboard deactivation. (2) Covers all categories of processors, whether for direct disposal or for transfer to other markets.
Sources: Japan Automobile Recycling Promotion Center; Japan Auto Recycling Partnership; Toyotsu Recycle Corporation; “ART” group of companies

RECYCLING RATES: TARGETED & ACHIEVED

Three Designated Items	Target	Achieved
Fluorocarbons	Destruction	2.94 million vehicle units (2019)
Airbags	85%	94-95% (2019)
ASR	2005: 30% 2010: 50% 2015: 70%	95.6-97.2% (2019)

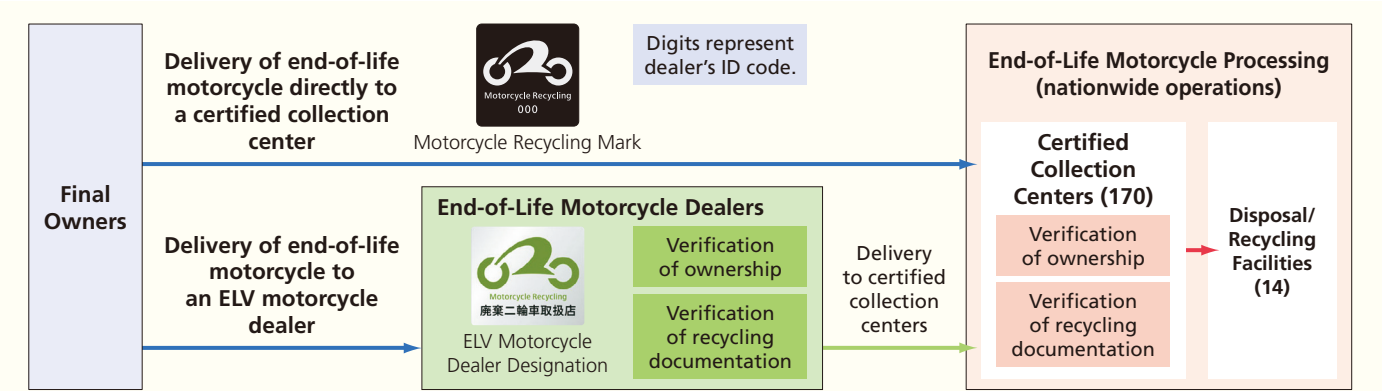
Sources: Government-affiliated entities

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



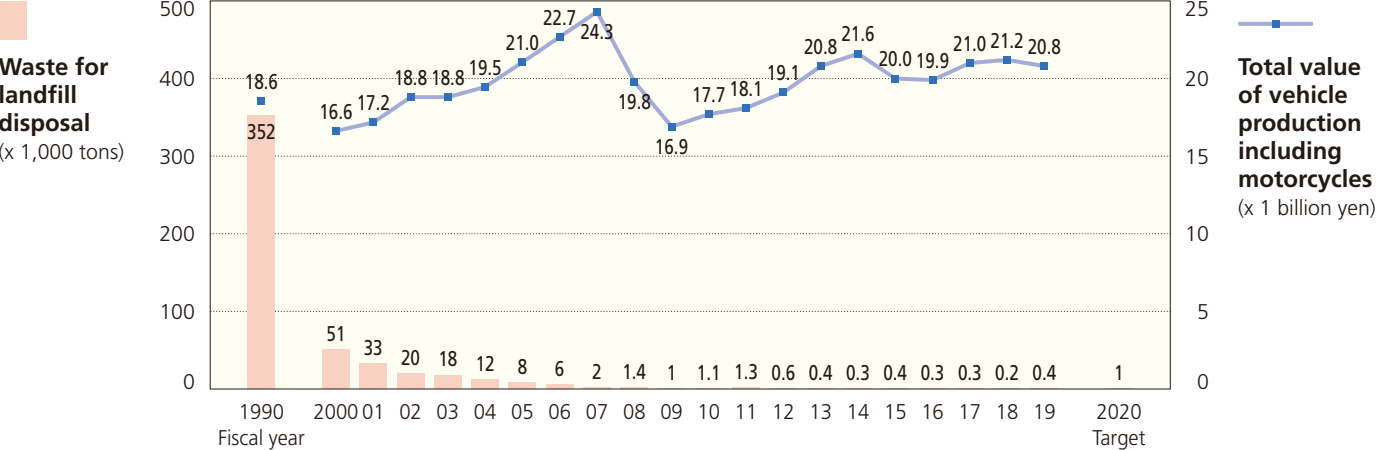
Note: The Japan Automobile Recycling Promotion Center assumes the same responsibilities as automobile manufacturers and importers when an ELV has no manufacturer representation under the provisions of this law. It also assumes transport-to-mainland costs for ELVs turned in on Japan’s smallest islands.

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)	0.010		
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	0.4		
			PM	0.010		
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) (5)	2016	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) (5)	2016	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) (5)	2016	CO	1.14
					THC	0.17
					NOx	0.09

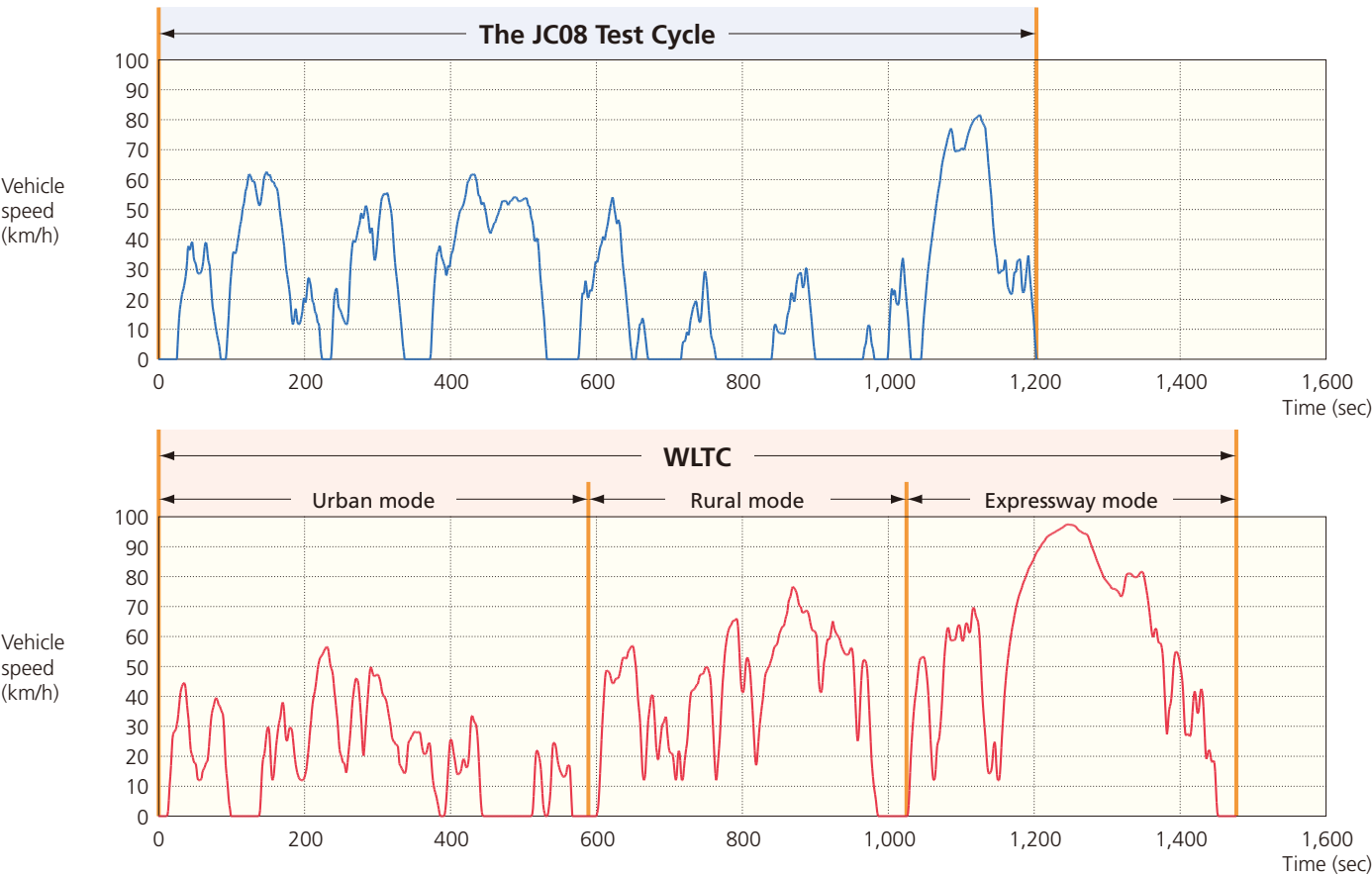
(1) WLTC: Worldwide Harmonized Light Vehicle Test Cycle, on the basis of values measured in cold-start state. (2) PM values apply only to direct-injection, lean-burn vehicles. (3) Small-sized diesel passenger cars have an equivalent inertia weight (EIW) of 1.25t (GVW of 1.265t) or less, and mid-sized 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) WMTC: World Motorcycle Test Cycle. Note: CO: Carbon monoxide; NMHC: Non-methane hydrocarbons; NOx: Nitrogen oxides; PM: Particulate matter; THC: Total hydrocarbons.

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

(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.).

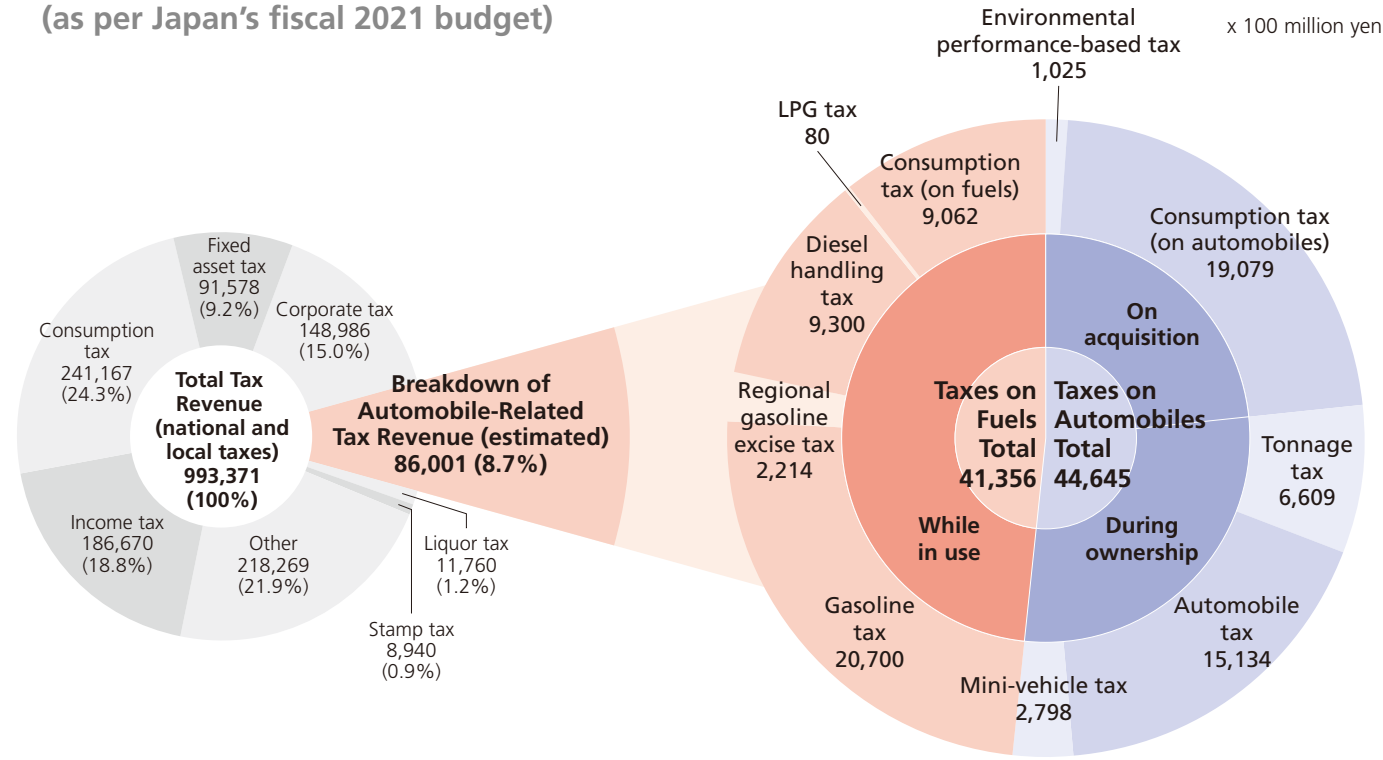
Urban mode (2) 15.2km/L
Rural mode (2) 21.4km/L
Expressway mode (2) 23.2km/L

(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 2021, the total value of tax revenue from these automobile-related taxes has been estimated at 9.0 trillion yen, or 8.7% of Japan’s projected total tax revenue of 99 trillion yen in fiscal 2021.

TAX REVENUE (Estimated) BY SOURCE IN FISCAL 2021 (as per Japan’s fiscal 2021 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, 2021)

Tax Category	On Acquisition		During Ownership			While in Use				
	Environmental Performance-Based Tax	Consumption Tax	Tonnage Tax	Automobile Tax	Mini-Vehicle Tax	Gasoline Tax	Regional Gasoline Excise Tax	Diesel Handling Tax	LPG Tax	Consumption 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	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
National/Local Tax	Prefectural and municipal tax	National and local tax	National tax	Prefectural tax	Municipal tax	Included in the fuel price				
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 December 2021 (see page 21). Highly fuel-efficient vehicles as well as electrified and other designated 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 2021 through April 2023 (see page 21).	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	1) Mini-vehicles for private use: - Passenger cars ¥10,800/year - Trucks ¥5,000/year Note: Above tax rates apply to new vehicles registered in or after fiscal 2015 and took effect from fiscal 2016. 2) Motorcycles - Up to 50cc ¥2,000/year - 51 to 90cc ¥2,000/year - 91 to 125cc ¥2,400/year - 126 to 250cc ¥3,600/year - 251cc and over ¥6,000/year Note: For some eco-friendly mini-vehicles, reductions apply to the mini-vehicle tax (see page 22).	¥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

JAPAN’S ESTIMATED AUTOMOBILE-RELATED TAX REVENUE IN FISCAL 2021

			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	1,025	0 to 3%		0 to 3% (commercial and mini-vehicles excluded)
		Consumption tax (on automobiles)	19,079	10%		0 to 1.00
		Tonnage tax	6,609	¥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	15,134	Based on engine capacity (e.g., for 1,001≤1,500cc passenger cars for private use, ¥30,500/year; see below)		
		Mini-vehicle tax	2,798	¥10,800/year (passenger cars for private use)		
		Total	44,645			
Taxes on Fuels	While in use	Gasoline tax	20,700	¥24.3/L	¥48.6/L	2.00
		Regional gasoline excise tax	2,214	¥4.4/L	¥5.2/L	1.18
		Diesel handling tax	9,300	¥15.0/L	¥32.1/L	2.14
		LPG tax	80	¥17.5/kg		1.00
		Consumption tax (on fuels)	9,062	10%		
		Total	41,356			
Grand Total			86,001			

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, 2021.

TAX RATES IN EFFECT (Examples), 1954-2021, 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	[Commercial and mini-vehicles excluded] 3% 5% 3% Abolished	[Commercial and mini-vehicles excluded]	[In the case of a passenger car for private use] 2,500 5,000 6,300 6,300 5,000 4,100 (2,500*)	13.0 11.0 14.8 19.2 22.1 24.3	2.0 3.5 4.0 4.4	6.0 8.0 10.4 12.5 15.0	5 10 17.5
1958-60	Second	1959				29.2 36.5 45.6 48.6	5.3 6.6 8.2 5.2	19.5 24.3 32.1	
1961-63	Third	1961 1964 1966							
1964-66	Fourth	1964 1966							
1967-69	Fifth	1967 1968							
1970-72	Sixth	1970 1971							
1973-77	Seventh	1974 1976 1979							
1978-82	Eighth								
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 2021							
Comparison with base tax rate (multiplier value)				0 to 1.00	1.64	2.00	1.18	2.14	1.00

Base tax rate
*The base tonnage tax rate (¥2,500/0.5t/year as of May 1, 2021) is applied only to eco-friendly vehicles.

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 2021 and their effective periods were extended for two years. Incentives for the acquisition tax 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, 2021 through April 30, 2023.

1. Passenger Cars

Requirements		When Imposed	Reductions/Exemptions						
• Electric vehicles • Fuel cell vehicles • Natural gas vehicles (complying with 2018 emission standards) • Plug-in hybrid vehicles		@ Initial & first vehicle inspections	Exempt (1)						
• Clean diesel passenger cars (complying with 2009 or 2018 emission standards)			Exempt (2), (4)						
Gasoline vehicles/ LPG vehicles (including hybrids)	Fuel efficiency		2030 Fuel Efficiency Standards (3)						
	Emissions level		-40%	-30%	-25%	-15%	-10%	Compliant	
	Down by 50% from 2018 standards	@ Initial vehicle inspection	25% reduction		50% reduction		Exempt (4)		

2. Small Trucks (GVW≤2.5t)

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

3. Mid-Sized Trucks (2.5t<GVW≤3.5t)

Requirements		When Imposed	Reductions/Exemptions						
• Electric vehicles • Fuel cell vehicles • Natural gas vehicles (with NOx emissions down by 10% from 2009 emission standards, or complying with 2018 emission standards) • Plug-in hybrid vehicles		@ Initial & first vehicle inspections	Exempt (1)						
	Fuel efficiency	@ Initial vehicle inspection	2015 Fuel Efficiency Standards						
	Emissions level		+5%	+10%	+15%				
Gasoline vehicles (including hybrids)	Down by 75% from 2005 standards or Down by 50% from 2018 standards		50% reduction	75% reduction	Exempt				
	Down by 50% from 2005 standards or Down by 25% from 2018 standards		No incentive	50% reduction	75% reduction				
Diesel vehicles (including hybrids)	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. Small and Mid-Sized Buses (GVW≤3.5t)

Requirements		When Imposed	Reductions/Exemptions			
• Electric vehicles • Fuel cell vehicles • Natural gas vehicles (with NOx emissions down by 10% from 2009 emission standards) • Plug-in hybrid vehicles		@ Initial & first vehicle inspections	Exempt (1)			
	Fuel efficiency	@ Initial vehicle inspection	2020 Fuel Efficiency Standards			
	Emissions level		Compliant	+5%	+10%	
Gasoline vehicles (including hybrids)	Down by 75% from 2005 standards or Down by 50% from 2018 standards		75% reduction	Exempt		
	Down by 50% from 2005 standards or Down by 25% from 2018 standards		50% reduction	75% reduction	Exempt	
Diesel vehicles (including hybrids)	NOx and PM emissions down by 10% from 2009 standards or Compliant with 2018 emission standards		75%	Exempt		
	Compliant with 2009 emission standards		50% reduction	75% reduction	Exempt	

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

Requirements		When Imposed	Reductions/Exemptions			
• Electric vehicles • Fuel cell vehicles • Natural gas vehicles (with NOx emissions down by 10% from 2009 emission standards) • Plug-in hybrid vehicles		@ Initial & first vehicle inspections	Exempt (1)			
Diesel vehicles (including hybrids)	Fuel efficiency	@ Initial vehicle inspection	2015 Fuel Efficiency Standards			
	Emissions level		+5%	+10%	+15%	
	Compliant with 2016 emission standards		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 clean diesel passenger cars first registered on or after May 15, 2022, only vehicles complying with 2020 fuel efficiency standards will be exempt. (3) Only vehicles complying with 2020 fuel efficiency standards are eligible for the reductions/exemptions shown here. (4) Vehicles compliant +20% with 2030 fuel efficiency standards will also be exempt at the time of first vehicle inspection post-purchase (exemption applies only when the new inspection certificate is issued within 15 days following expiration of the old certificate).

● ENVIRONMENTAL PERFORMANCE-BASED TAX REDUCTIONS/EXEMPTIONS

Period in effect: April 1, 2021 through March 31, 2023.

- 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 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 as well as electrified and other designated vehicles are exempted from the tax.
- For vehicles purchased through December 31, 2021, a provisional 1% reduction on this tax is in application.

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

Requirements		Tax Rates/Exemptions						
• Electric vehicles • Fuel cell vehicles • Natural gas vehicles (with NOx emissions down by 10% from 2009 emission standards, or complying with 2018 emission standards)		Passenger cars, Mini-vehicles	Exempt					
• Plug-in hybrid vehicles • Clean diesel vehicles		Passenger cars	Exempt (1)					
Gasoline vehicles/ LPG vehicles (including hybrids)	Fuel efficiency		2030 Fuel Efficiency Standards (2)					
			Under -40%	-40%	-35%	-25%	-15%	Compliant
	Emissions level							
	Down by 75% from 2005 standards or Down by 50% from 2018 standards	Passenger cars	3%	2%	1%	Exempt		
	Mini-vehicles	2%	1%	Exempt				

(1) For clean diesel passenger cars purchased on or after April 1, 2022, only vehicles complying with 2020 fuel efficiency standards and compliant -40% with 2030 fuel efficiency standards will be exempt. (2) Only vehicles complying with 2020 fuel efficiency standards are eligible for the reductions/exemptions shown here.

● TONNAGE TAX & ENVIRONMENTAL PERFORMANCE-BASED TAX REDUCTIONS for Vehicles Equipped with Advanced Safety Feature (ASV) Systems

The tax reductions detailed below are applied only once, on initial inspection mandated for new vehicle purchase.

Period in effect	Vehicles equipped with one designated system	Tonnage Tax: May 1, 2021 through April 30, 2024 (3 years) Environmental Performance-Based Tax: April 1, 2021 through March 31, 2023 (2 years)
	Vehicles equipped with two to four designated systems	Tonnage Tax: April 1, 2021 through October 31, 2021 Environmental Performance-Based Tax: April 1, 2021 through October 31, 2021
Eligible ASV systems		
Blind spot information control (BSIS), Advanced emergency braking system (AEBS), Electronic stability control (ESC), Lane departure warning system (LDWS)		

Vehicle Type	Requirements	Reductions	
		Tonnage Tax	Environmental Performance-Based Tax
Heavy-duty truck (GVW>8t) Heavy-duty truck (GVW>8t) [tow truck]	Equipped with BSIS	25% reduction	¥1.75 million deduction from purchase price
Heavy-duty truck (3.5t<GVW≤20t) Bus (5t<GVW≤12t)*	Equipped with AEBS, ESC, and LDWS	50% reduction	¥3.5 million deduction from purchase price
Bus (GVW<5t)*	Equipped with AEBS and LDWS		
Heavy-duty truck (8t<GVW≤20t)	Equipped with BSIS, AEBS, ESC, and LDWS	75% reduction	¥5.25 million deduction from purchase price

*“Bus” here means a passenger vehicle with ≥10-person occupancy.

● TONNAGE TAX & ENVIRONMENTAL PERFORMANCE-BASED TAX REDUCTIONS/EXEMPTIONS for Public-Use Assisted-Mobility Vehicles (AMVs)

The tax reductions/exemptions detailed below are applied only once, on initial inspection mandated for new vehicle purchase.

Period in effect

Tonnage Tax: May 1, 2021 through March 31, 2024 (3 years)

Environmental Performance-Based Tax: April 1, 2021 through March 31, 2023 (2 years)

Vehicle Type & Requirements		Reductions/Exemptions	
		Tonnage Tax	Environmental Performance-Based Tax
Low-floor (“non-step”) buses ⁽¹⁾		Exempt	¥10 million deduction from purchase price
Buses with ≥30-person occupancy equipped with an electric lift ⁽¹⁾	Airport shuttle buses		¥8 million deduction from purchase price
	Other		¥6.5 million deduction from purchase price
Buses with <30-person occupancy equipped with an electric lift ⁽¹⁾			¥2 million deduction from purchase price
Universal design-based taxis ⁽²⁾			¥1 million deduction from purchase price

(1) For use in public/charter transport. (2) For use in public transport.

● FISCAL 2021 & 2022 SPECIAL AUTOMOBILE TAX REDUCTIONS (Passenger Cars and Trucks & Buses)

Requirements				Reduction (1)
Passenger Cars	For private use	• Electric vehicles • Fuel cell vehicles • Natural gas vehicles (with NOx emissions down by 10% from 2009 emission standards, or complying with 2018 emission standards) • Plug-in hybrid vehicles		75% reduction
	For commercial use	Gasoline vehicles/LPG vehicles (including hybrids)	Compliant -10% with 2030 fuel efficiency standards, with emissions down by 75% from 2005 standards or down by 50% from 2018 standards (2)	
		Diesel vehicles (including hybrids)	Compliant -10% with 2030 fuel efficiency standards and Compliant with 2009 or 2018 emission standards (2)	
		Gasoline vehicles/LPG vehicles (including hybrids)	Compliant -30% with 2030 fuel efficiency standards, with emissions down by 75% from 2005 standards or down by 50% from 2018 standards (2)	50% reduction
		Diesel vehicles (including hybrids)	Compliant -30% with 2030 fuel efficiency standards and Compliant with 2009 or 2018 emission standards (2)	
Trucks & Buses		• Electric vehicles • Fuel cell vehicles • Natural gas vehicles (with NOx emissions down by 10% from 2009 emission standards, or complying with 2018 emission standards) • Plug-in hybrid vehicles		75% reduction

(1) Reductions effective on initial inspection mandated for new vehicle purchase are applied in the fiscal year following the year of purchase. 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. (2) Only vehicles complying with 2020 fuel efficiency standards are eligible for the reductions shown here.

● FISCAL 2021 & 2022 SPECIAL MINI-VEHICLE TAX REDUCTIONS (Minicars and Mini-Trucks) *

Requirements				Reduction (1)
Minicars	For private use	• Electric vehicles • Natural gas vehicles (with NOx emissions down by 10% from 2009 emission standards, or complying with 2018 emission standards)		75% reduction
	For commercial use	Gasoline vehicles (including hybrids)	Compliant -10% with 2030 fuel efficiency standards, with emissions down by 75% from 2005 standards or down by 50% from 2018 standards (2)	50% reduction
			Compliant -30% with 2030 fuel efficiency standards, with emissions down by 75% from 2005 standards or down by 50% from 2018 standards (2)	25% reduction
Mini-Trucks		• Electric vehicles • Natural gas vehicles (with NOx emissions down by 10% from 2009 emission standards, or complying with 2018 emission standards)		75% reduction

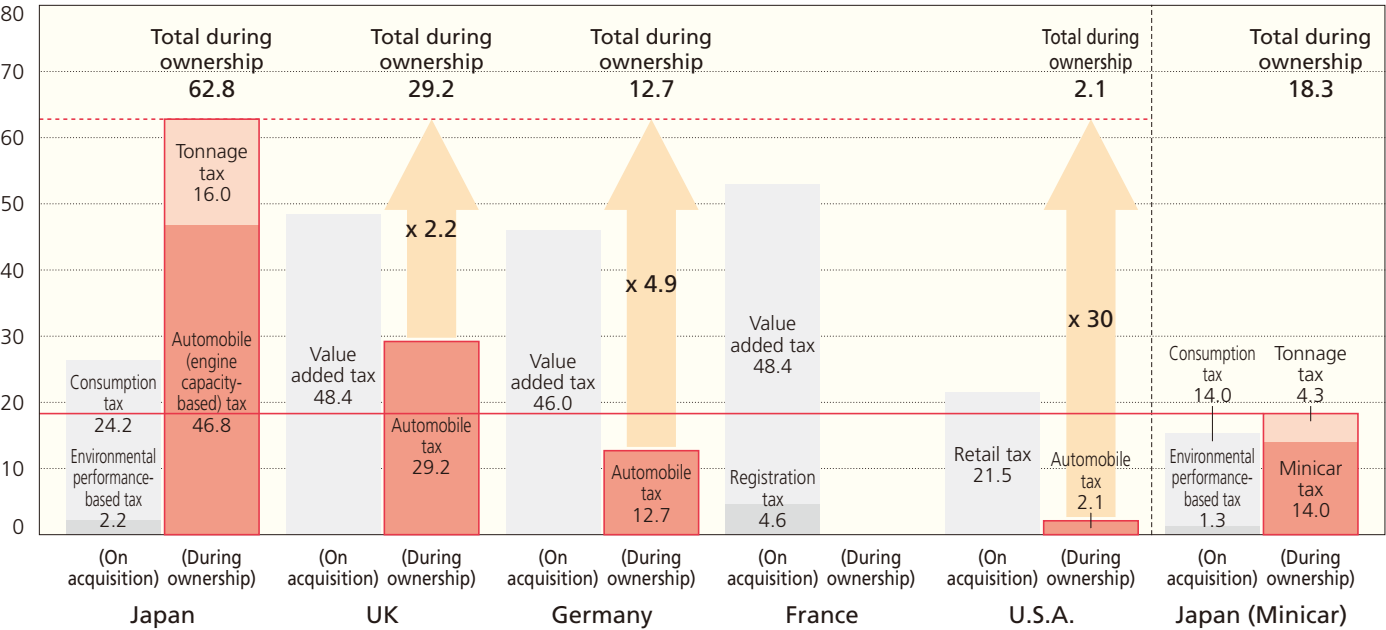
*Applies only to three- or four-wheeled mini-vehicles at the time of new vehicle registration.

(1) Reductions effective on initial inspection mandated for new vehicle purchase are applied in the fiscal year following the year of purchase. 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. (2) Only vehicles complying with 2020 fuel efficiency standards are eligible for the reductions shown here.

Automobile-Related Taxes Are Onerous

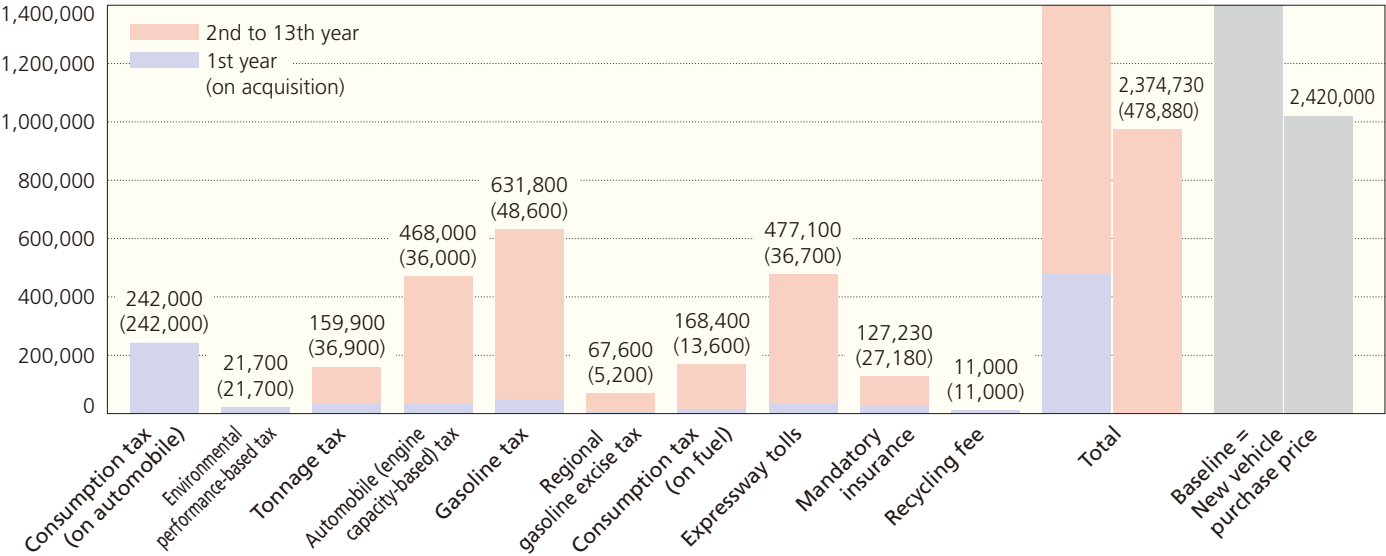
Consider the case of a passenger car costing 2.42 million yen when purchased new and providing 13 years of service to the original owner for private use. During that period, six different categories of taxes (including consumption tax at the time of vehicle purchase and on fuel) will be assessed on the 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.

● INTERNATIONAL COMPARISON OF TAXES



Assumptions: 1) Engine capacity: 2000cc. 2) GVW≤1.5t. 3) Purchase price: ¥2.42 million (¥1.40 million for a minicar). 4) Fuel consumption (JC08 test cycle-based): 20.4km/L (CO₂ emissions: 114g/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 125, GBP 1 = JPY 143, USD 1 = JPY 107 (averaged April 2020-March 2021).
Notes: 1. Figures here are based on tax rates in effect as of April 2021. 2. Figures here do not take into account applicable incentives/surcharges, such as tax incentives for eco-friendly vehicles in Japan, if any.
Source: Japan Automobile Manufacturers Association

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



Assumptions: 1) A passenger car with 2000cc engine capacity and purchase price of ¥2.42 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, 2021. 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, 2021.) 2. Value of expressway tolls was estimated by JAMA based on expressway toll revenue in 2019.
Source: Japan Automobile Manufacturers Association

81.99 Million People Hold Driver’s Licenses

At the end of 2020 there were 81.99 million people, or 44.60 million men and 37.39 million women, holding valid driver’s licenses in Japan. The number of driver’s licenses held totalled 126.08 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 1.88 million people, or 1.82 million men and 70,000 women, and Class 1 licenses by 124.19 million people, or 79.31 million men and 44.88 million women.

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

Number of persons

Year	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Men	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	44,596,553
Women	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	37,393,334
Total	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	81,989,887

● TOTAL NUMBER OF LICENSES HELD, BY YEAR & LICENSE/VEHICLE CATEGORY

Number of licenses held

Year		2014	2015	2016	2017	2018	2019	2020
Class 2 Licenses	Large motor vehicle	986,518	964,383	942,526	919,242	896,127	871,492	847,769
	Middle-category motor vehicle	960,304	917,142	873,879	1,055,123	1,001,038	944,325	893,513
	Ordinary motor vehicle	224,823	229,494	234,070	13,318	29,358	45,103	56,943
	Large special-purpose vehicle	44,330	43,605	42,997	42,302	41,560	40,913	40,313
	Traction vehicle	49,665	48,844	48,134	47,325	46,446	45,614	44,844
	Subtotal	2,265,640	2,203,468	2,141,606	2,077,310	2,014,529	1,947,447	1,883,382
Class 1 Licenses	Large motor vehicle	5,253,880	5,198,185	5,143,533	5,086,713	5,027,351	4,959,169	4,894,263
	Middle-category motor vehicle	70,632,500	69,732,685	68,813,808	67,870,730	66,958,774	65,855,860	64,726,907
	Quasi-middle-category motor vehicle	—	—	—	11,739,992	11,707,930	11,686,402	11,676,958
	Ordinary motor vehicle	9,113,940	10,297,590	11,473,646	905,528	2,067,271	3,207,204	4,337,710
	Large special-purpose vehicle	2,473,823	2,476,598	2,475,520	2,471,164	2,466,107	2,453,392	2,481,852
	Traction vehicle	1,174,267	1,178,790	1,182,806	1,187,003	1,191,690	1,195,020	1,200,999
	Large two-wheeler	10,430,075	10,112,584	9,799,816	9,466,072	9,126,995	8,764,619	8,451,156
	Ordinary two-wheeler	9,619,692	9,752,541	9,877,616	9,994,091	10,116,497	10,242,096	10,378,351
	Small special-purpose vehicle	450,123	422,020	394,952	367,603	341,013	314,838	292,244
	Motorized bicycle	16,784,700	16,618,061	16,450,534	16,291,972	16,142,848	15,950,023	15,754,030
	Subtotal	125,933,000	125,789,054	125,612,231	125,380,868	125,146,476	124,628,623	124,194,470
Total		128,198,640	127,992,522	127,753,837	127,458,178	127,161,005	126,576,070	126,077,852

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; the Road Vehicles Act also establishes the categories of large and small special-purpose vehicles.

● 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.

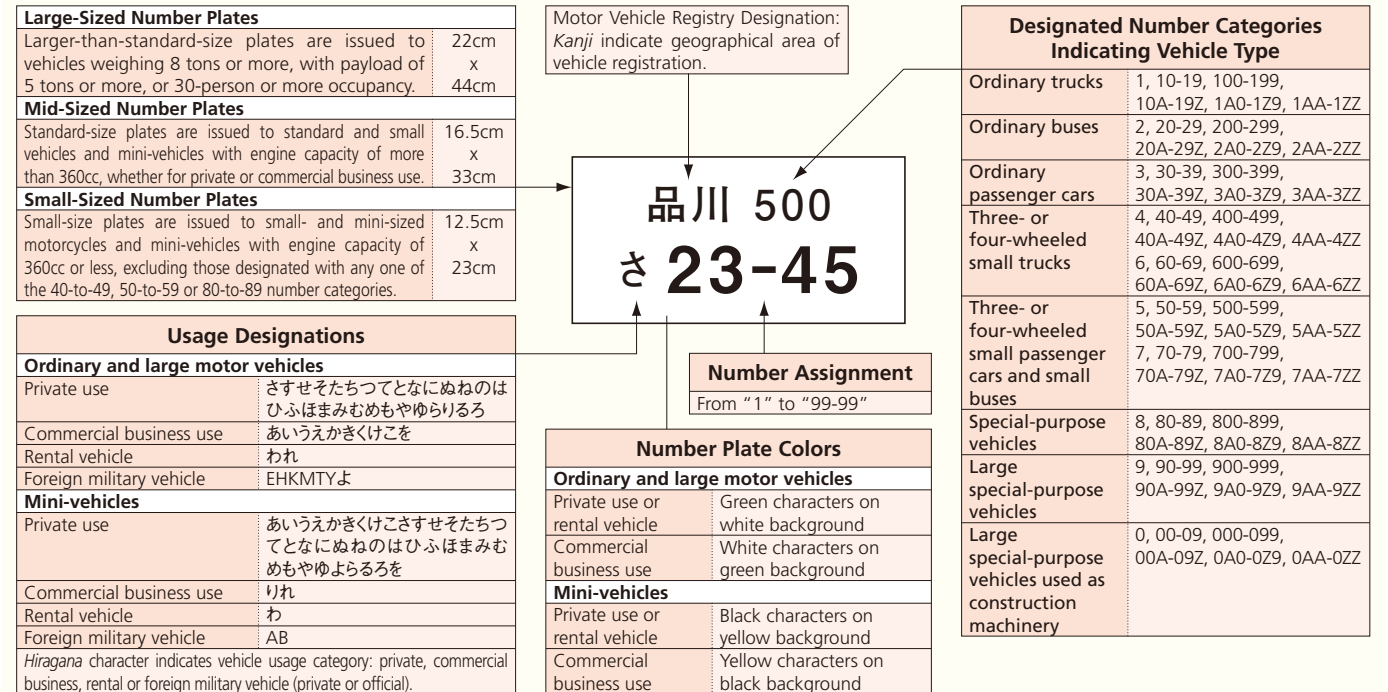
● CLASSIFICATION OF MOTORCYCLES

Road Vehicles Act					
Category	Engine Capacity	Rated Output	Width	Height	Length
Small-sized	Over 250cc	Over 1.0kW	Over 1.3m	Over 2.0m	Over 2.5m
Mini-sized	126cc to 250cc	Over 1.0kW	1.3m and under	2.0m and under	2.5m and under
Motor-driven cycle Class 2	51cc to 125cc	Over 0.6kW to 1.0kW	1.3m and under	2.0m and under	2.5m and under
Motor-driven cycle Class 1	50cc and under	0.6kW 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 20.0kW
Ordinary	51cc to 400cc	Over 0.6kW to 20.0kW
Motorized bicycle	50cc and under	0.6kW 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



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, 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 & Items Produced

Country/ Territory	Country No. (see map)	Motor Vehicles (incl. parts)	Motor- cycles (incl. parts)	Motor Vehicles & Motorcycles (incl. parts)	Parts Only
Europe					
Czech Republic	1	1	-	-	-
France	2	1	1	-	-
Hungary	3	1	-	-	-
Italy	4	1	1	-	1
Poland	5	-	-	-	1
Portugal	6	2	-	-	-
Russia	7	8	-	-	-
Spain	8	1	-	-	3
Turkey	9	4	-	-	-
UK	10	3	-	-	1
Europe Total		22	2	-	6

Country/ Territory	Country No. (see map)	Motor Vehicles (incl. parts)	Motor- cycles (incl. parts)	Motor Vehicles & Motorcycles (incl. parts)	Parts Only
Africa					
Algeria	11	1	-	-	-
Egypt	12	5	-	-	-
Kenya	13	4	1	-	-
Mauritius	14	-	-	-	-
Morocco	15	1	-	-	-
Nigeria	16	3	2	-	-
South Africa	17	5	-	-	-
Africa Total		19	3	-	-
Middle East					
Saudi Arabia	18	2	-	-	-
Middle East Total		2	-	-	-
Oceania					
Australia	19	-	-	-	1
Oceania Total		-	-	-	1

Country/ Territory	Country No. (see map)	Motor Vehicles (incl. parts)	Motor- cycles (incl. parts)	Motor Vehicles & Motorcycles (incl. parts)	Parts Only
Asia					
Bangladesh	20	2	2	-	-
Cambodia	21	-	1	-	-
China	22	26	10	-	20
India	23	10	7	-	2
Indonesia	24	15	7	1	15
South Korea	25	1	-	-	-
Laos	26	-	1	-	-
Malaysia	27	12	2	-	6
Myanmar	28	5	-	-	-
Pakistan	29	4	3	1	-
Philippines	30	4	4	-	4
Taiwan	31	7	2	-	1
Thailand	32	16	4	-	11
Vietnam	33	6	3	2	3
Asia Total		108	46	4	62

Country/ Territory	Country No. (see map)	Motor Vehicles (incl. parts)	Motor- cycles (incl. parts)	Motor Vehicles & Motorcycles (incl. parts)	Parts Only
North America					
Canada	34	5	-	-	2
U.S.A.	35	14	1	-	10
North America Total		19	1	-	12
Latin America					
Argentina	36	1	2	-	-
Brazil	37	8	4	-	5
Colombia	38	1	2	-	-
Ecuador	39	-	-	-	-
Mexico	40	9	2	-	2
Peru	41	-	1	-	-
Venezuela	42	1	-	-	-
Latin America Total		20	11	-	7
World Total		190	63	4	88

Source: Japan Automobile Manufacturers Association

Japanese Automakers’ Overseas Production Finishes at 15.38 Million Automobiles and 20.16 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 page 24). Japanese automakers’ overseas production in 2020 totalled 15.38 million automobiles and 20.16 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	252,384	159,710	11,859,761
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	7,547,127	0	1,410,628	1,302,277	3,068,979	2,422,152	1,029,511	233,709	93,675	13,383,629
2012	8,500,825	0	1,484,110	1,383,583	4,253,869	3,324,703	1,234,584	248,711	101,381	15,823,480
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	10,847,347	0	1,638,200	1,223,117	4,407,151	3,531,395	1,745,597	211,761	0	18,850,056
2020	9,168,992	0	1,236,883	439,901	3,498,540	2,715,707	1,318,780	153,392	0	15,376,587

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. 7. EU data for 2020 does not include the United Kingdom.

Source: Japan Automobile Manufacturers Association

● OVERSEAS PRODUCTION BY JAPANESE MOTORCYCLE MANUFACTURERS In vehicle units

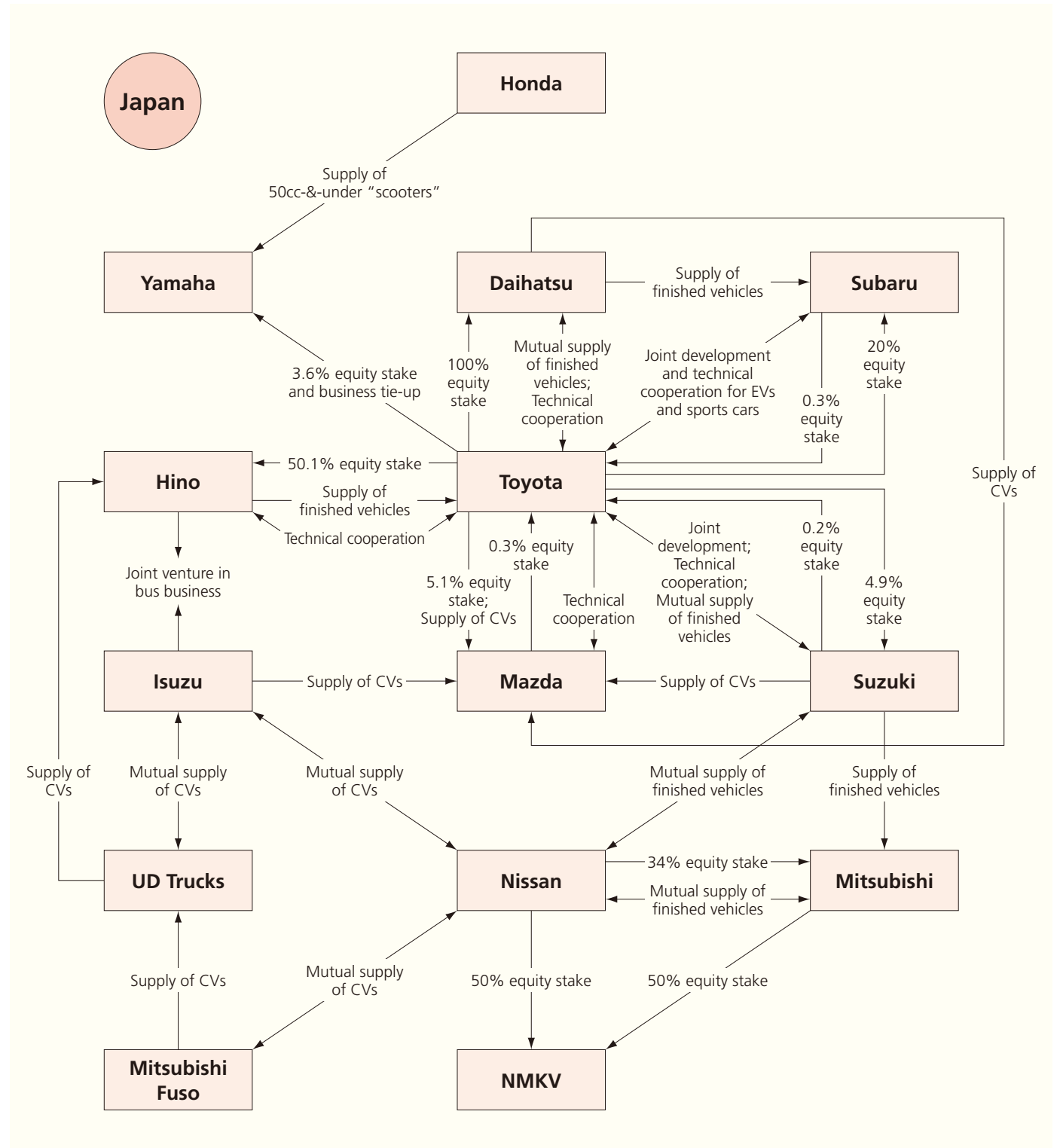
Year	Total
2019	26,850,264
2020	20,161,917

Source: Japan Automobile Manufacturers Association

Japanese Automakers Forge Extensive International Alliances

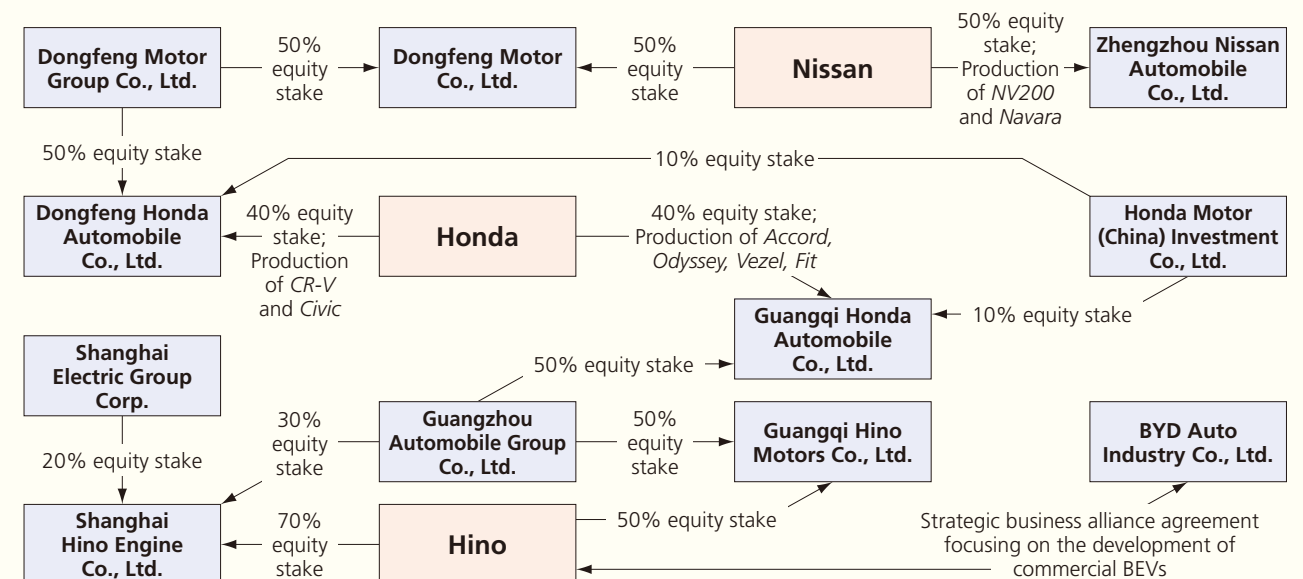
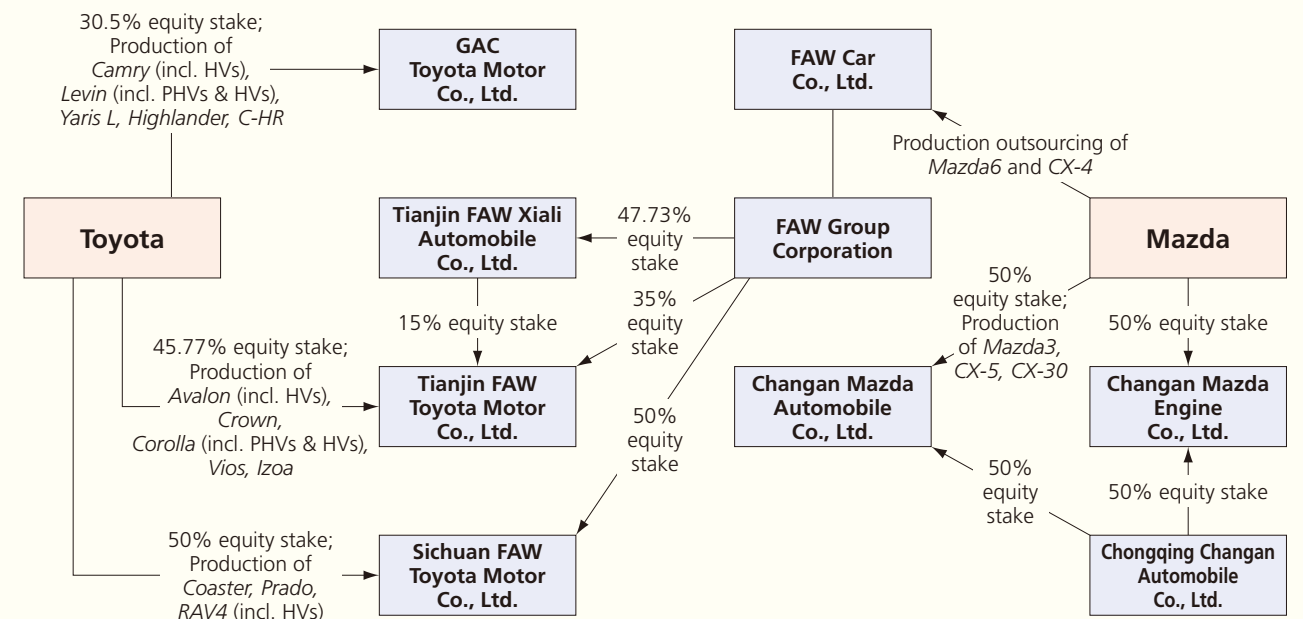
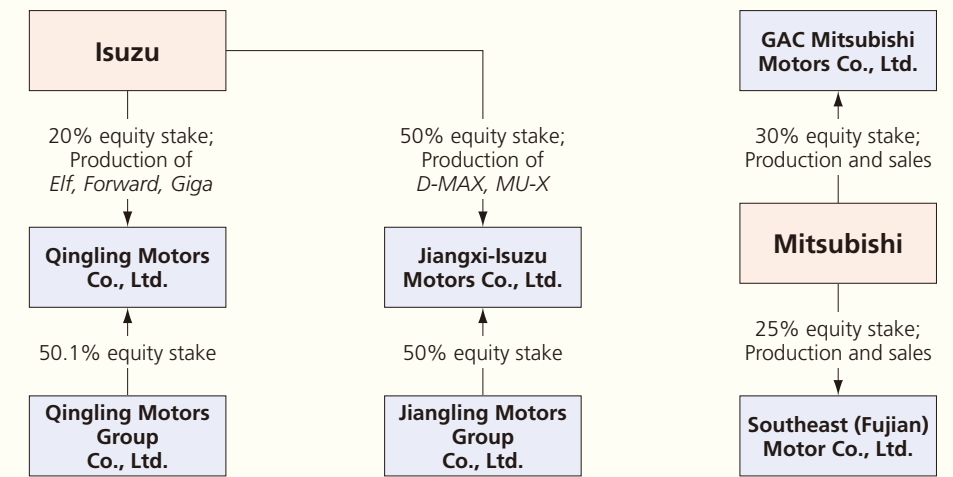
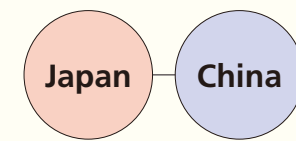
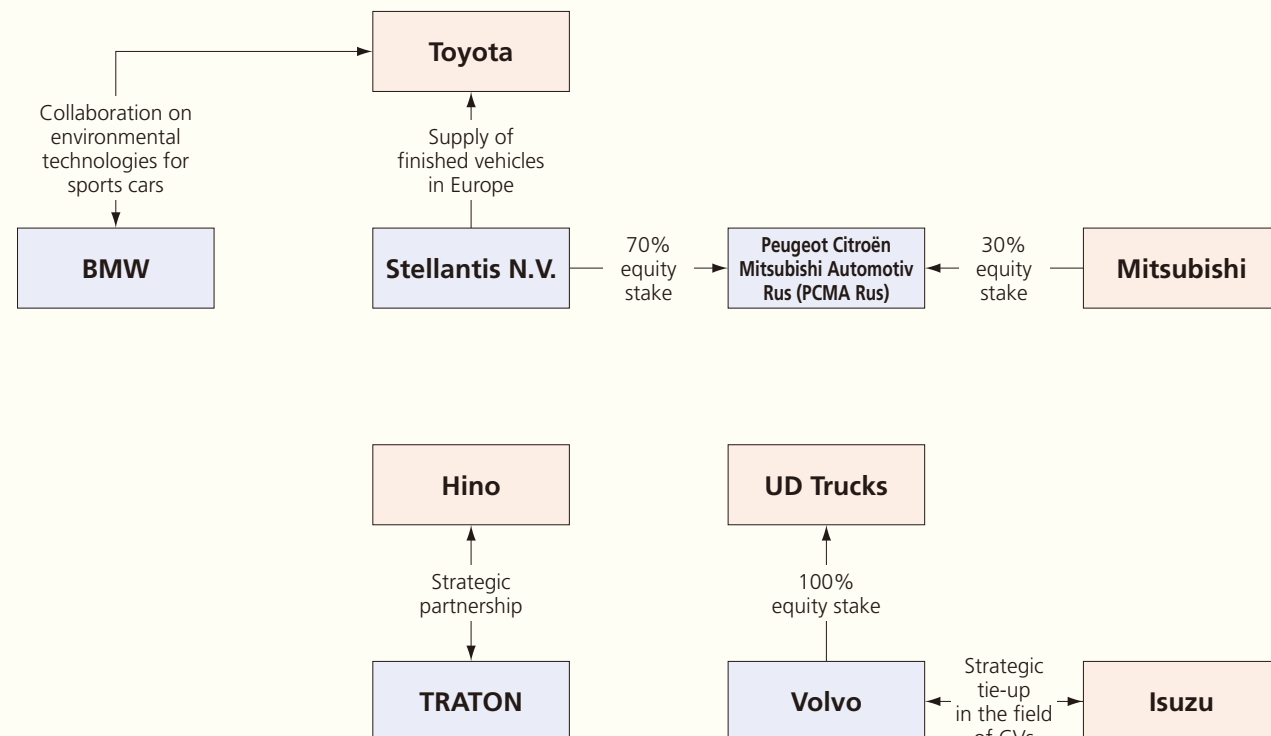
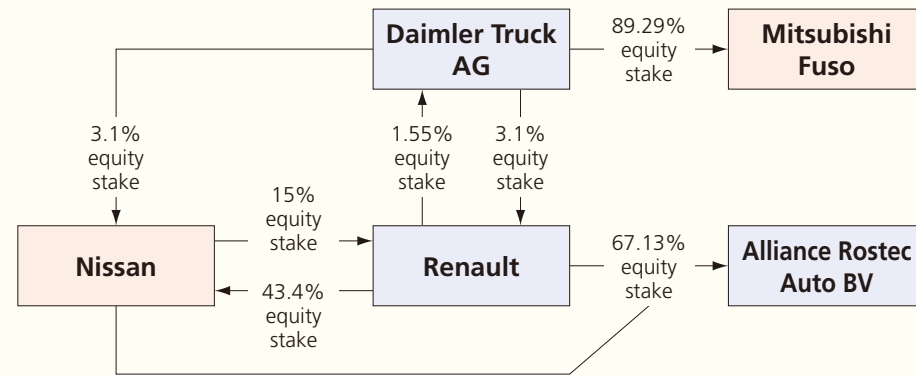
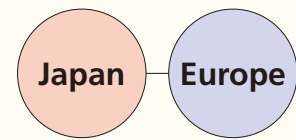
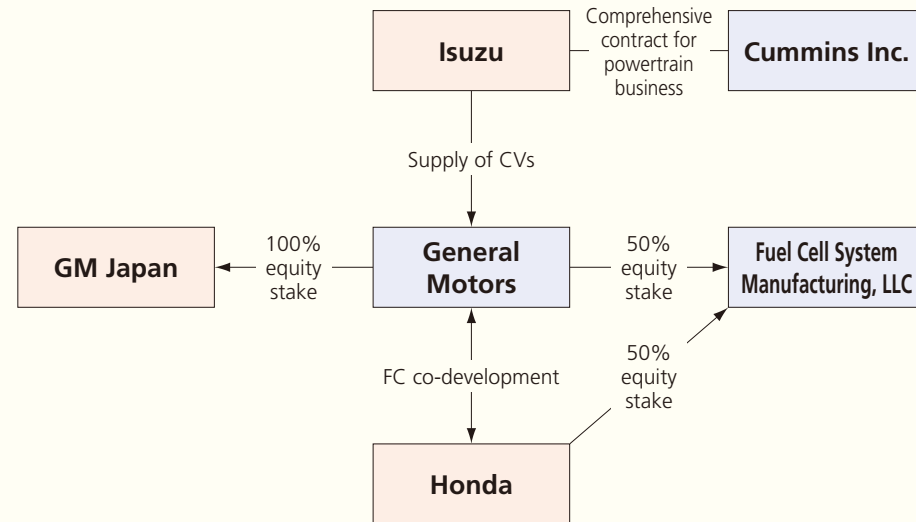
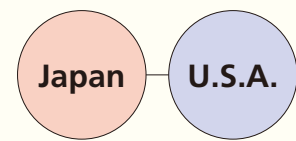
With economic globalization, Japanese automobile manufacturers have rapidly adapted to the needs of individual markets, not only by shifting production to those markets but also by forging extensive alliances with overseas manufacturers. Various forms of partnership currently exist among Japanese, U.S. 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, 2021



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

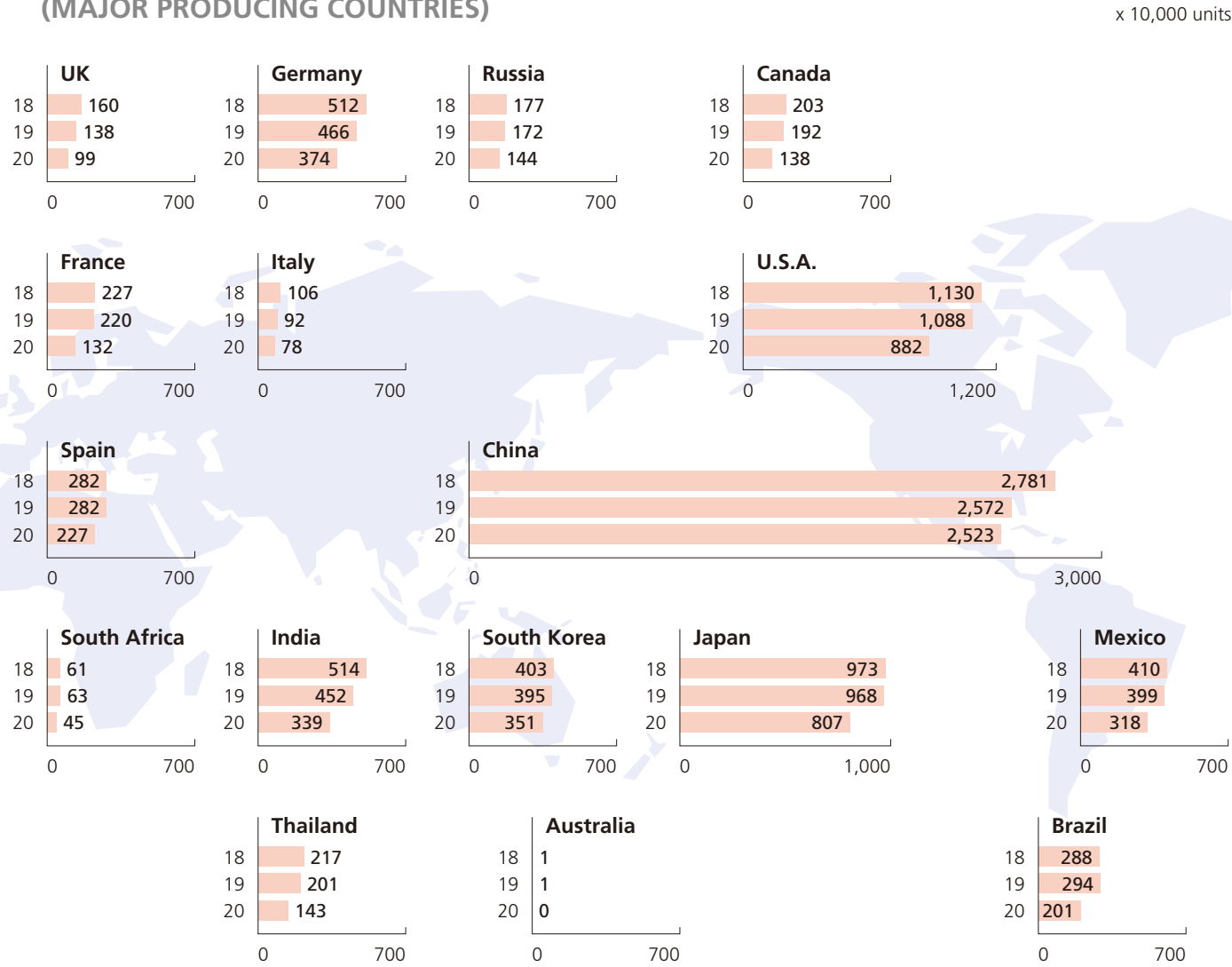
Source: Japan Automobile Manufacturers Association



Motor Vehicle Production Worldwide Declines to 77.62 Million Units

In 2020 worldwide motor vehicle production (excluding motorcycles) dropped 15.4% from the previous year to a total of 77.62 million units.

MOTOR VEHICLE PRODUCTION EXCLUDING MOTORCYCLES (MAJOR PRODUCING COUNTRIES)



GLOBAL MOTORCYCLE PRODUCTION (BY COUNTRY/TERRITORY)

Country/Territory	2017			2018			2019		
	Mopeds	Motorcycles	Total	Mopeds	Motorcycles	Total	Mopeds	Motorcycles	Total
Czech Republic	—	—	1,331	—	—	1,493	—	—	980
Italy	75,859	249,356	325,215	74,974	254,211	329,185	63,558	265,522	329,080
Brazil	—	—	882,876	—	—	1,036,788	—	—	1,107,758
China	—	—	17,145,746	—	—	15,577,507	—	—	17,366,580
India	—	—	23,154,838	—	—	24,499,777	—	—	21,036,294
Japan	0	646,983	646,983	0	651,884	651,884	0	567,376	567,376
Malaysia	—	—	440,673	—	—	465,083	—	—	553,382
Pakistan	—	—	1,781,856	—	—	1,902,632	—	—	1,677,352
Philippines	—	—	1,173,883	—	—	1,258,566	—	—	1,161,646
Taiwan	—	—	1,237,080	—	—	1,088,657	—	—	1,027,867
Thailand	—	—	2,055,193	—	—	2,063,076	—	—	1,948,017

Note: "—" means data was not available at the end of March 2021.

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

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

In vehicle units

Country/Region/Territory	2018			2019			2020		
	Passenger Cars	Trucks & Buses	Total	Passenger Cars	Trucks & Buses	Total	Passenger Cars	Trucks & Buses	Total
Austria	144,500	20,400	164,900	158,400	21,000	179,400	104,544	0	104,544
Belgium	265,958	42,535	308,493	247,020	38,777	285,797	237,057	30,403	267,460
Finland	112,000	0	112,000	114,785	0	114,785	86,270	0	86,270
France	1,772,641	495,123	2,267,764	1,675,198	527,262	2,202,460	927,718	388,653	1,316,371
Germany	5,120,409	0	5,120,409	4,661,328	0	4,661,328	3,515,372	227,082	3,742,454
Italy	673,196	389,136	1,062,332	542,007	373,298	915,305	451,826	325,339	777,165
Netherlands	214,000	0	214,000	176,113	0	176,113	127,058	0	127,058
Portugal	234,151	60,239	294,390	282,142	63,562	345,704	211,281	52,955	264,236
Spain	2,267,396	552,169	2,819,565	2,248,019	574,336	2,822,355	1,800,664	467,521	2,268,185
Sweden	291,000	0	291,000	279,000	0	279,000	249,000	0	249,000
UK	1,519,440	84,888	1,604,328	1,303,135	78,270	1,381,405	—	—	—
Czech Republic	1,437,396	5,488	1,442,884	1,427,563	6,400	1,433,963	1,152,901	6,250	1,159,151
Hungary	463,000	0	463,000	498,158	0	498,158	406,497	0	406,497
Poland	451,600	208,052	659,652	434,700	215,164	649,864	278,900	172,482	451,382
Romania	476,769	0	476,769	490,412	0	490,412	438,107	0	438,107
Slovakia	1,093,215	0	1,093,215	1,100,000	0	1,100,000	985,000	0	985,000
Slovenia	209,378	0	209,378	199,102	0	199,102	141,714	0	141,714
European Union (EU28*)	16,746,049	1,858,030	18,604,079	15,837,082	1,898,069	17,735,151	11,113,909	1,670,685	12,784,594
UK	—	—	—	—	—	—	920,928	66,116	987,044
Turkey	1,026,571	523,689	1,550,260	982,642	478,602	1,461,244	855,043	442,835	1,297,878
Serbia	56,303	146	56,449	34,985	130	35,115	23,272	103	23,375
Russia	1,563,747	204,799	1,768,546	1,523,594	196,190	1,719,784	1,260,517	174,818	1,435,335
Azerbaijan	969	167	1,136	2,360	163	2,523	1,949	0	1,949
Belarus	10,941	12,294	23,235	20,420	10,067	30,487	21,295	9,978	31,273
Kazakhstan	30,016	1,529	31,545	44,077	5,323	49,400	64,790	10,041	74,831
Ukraine	5,660	963	6,623	6,254	1,011	7,265	4,202	750	4,952
Uzbekistan	220,667	0	220,667	271,113	0	271,113	280,080	0	280,080
CIS	1,832,000	219,752	2,051,752	1,867,818	212,754	2,080,572	1,632,833	195,587	1,828,420
Europe	19,660,923	2,601,617	22,262,540	18,722,527	2,589,555	21,312,082	14,545,985	2,375,326	16,921,311
Canada	655,896	1,369,898	2,025,794	461,370	1,455,215	1,916,585	327,681	1,048,942	1,376,623
U.S.A.	2,785,164	8,512,747	11,297,911	2,512,780	8,367,239	10,880,019	1,926,795	6,895,604	8,822,399
North America	3,441,060	9,882,645	13,323,705	2,974,150	9,822,454	12,796,604	2,254,476	7,944,546	10,199,022
Mexico	1,581,012	2,519,758	4,100,770	1,382,714	2,604,080	3,986,794	967,479	2,209,121	3,176,600
Argentina	208,573	258,076	466,649	108,364	206,423	314,787	93,001	164,186	257,187
Brazil	2,387,967	493,051	2,881,018	2,448,490	496,498	2,944,988	1,608,870	405,185	2,014,055
Colombia	71,676	3,800	75,476	59,586	0	59,586	43,351	0	43,351
Latin America	4,249,228	3,274,685	7,523,913	3,999,154	3,307,001	7,306,155	2,712,701	2,778,492	5,491,193
North and Latin America	7,690,288	13,157,330	20,847,618	6,973,304	13,129,455	20,102,759	4,967,177	10,723,038	15,690,215
Australia	0	6,371	6,371	0	5,606	5,606	0	4,730	4,730
China	23,529,423	4,279,773	27,809,196	21,360,193	4,360,472	25,720,665	19,994,081	5,231,161	25,225,242
India	4,032,481	1,110,328	5,142,809	3,623,335	892,682	4,516,017	2,851,268	543,178	3,394,446
Indonesia	1,055,774	287,940	1,343,714	1,045,666	241,182	1,286,848	551,400	139,886	691,286
Iran	1,027,000	68,210	1,095,210	770,000	51,060	821,060	826,210	54,787	880,997
Japan	8,359,286	1,370,308	9,729,594	8,328,756	1,355,538	9,684,294	6,960,411	1,107,532	8,067,943
Malaysia	520,526	44,445	564,971	534,115	37,517	571,632	457,755	27,431	485,186
Myanmar	0	0	0	0	0	0	8,346	2,407	10,753
Pakistan	223,481	46,311	269,792	156,623	30,093	186,716	95,504	21,871	117,375
Philippines	0	8,400	8,400	0	8,400	8,400	37,141	30,156	67,297
South Korea	3,661,730	367,104	4,028,834	3,612,587	338,030	3,950,617	3,211,706	295,068	3,506,774
Taiwan	190,052	63,189	253,241	189,549	61,755	251,304	180,967	64,648	245,615
Thailand	877,015	1,290,679	2,167,694	795,254	1,218,456	2,013,710	537,633	889,441	1,427,074
Vietnam	146,000	91,000	237,000	250,000	0	250,000	125,235	40,333	165,568
Asia-Oceania	43,622,768	9,034,058	52,656,826	40,666,078	8,600,791	49,266,869	35,837,657	8,452,629	44,290,286
Algeria	70,597	0	70,597	60,012	0	60,012	754	0	754
Egypt	18,500	0	18,500	18,500	0	18,500	23,754	0	23,754
Morocco	366,773	35,312	402,085	360,110	34,542	394,652	221,299	27,131	248,430
South Africa	321,097	289,757	610,854	348,665	283,318	631,983	238,216	209,003	447,219
Africa	776,967	325,069	1,102,036	787,287	317,860	1,105,147	484,023	236,134	720,157
Grand Totals	71,750,946	25,118,074	96,869,020	67,149,196	24,637,661	91,786,857	55,834,842	21,787,127	77,621,969

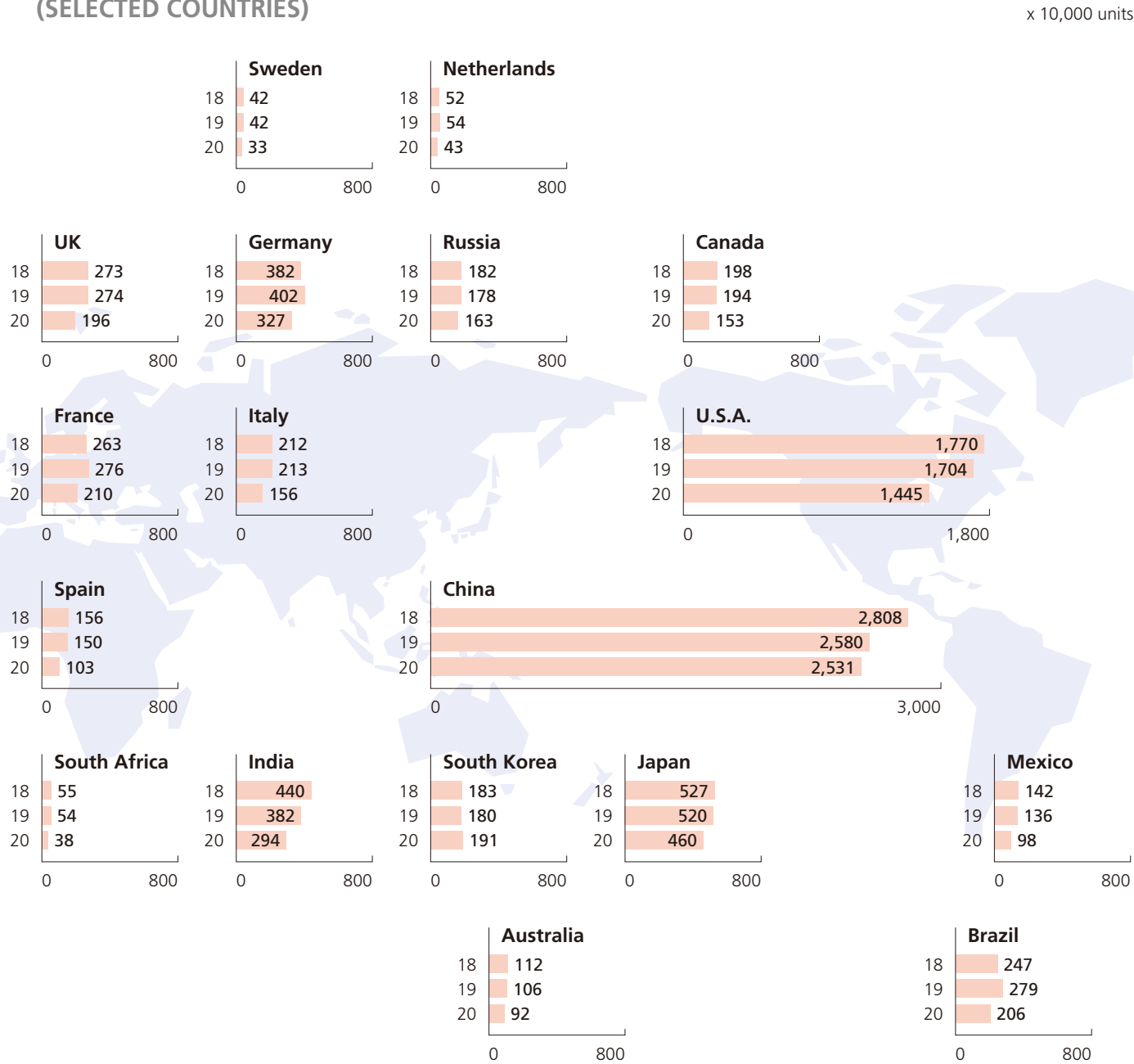
*"EU28" applies through 2019. Notes: 1. Includes preliminary figures. 2. Some EU and Latin American countries do not release truck and bus production data.

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

A Total of 78.0 Million New Motor Vehicles Sold Globally

In 2020 new motor vehicle registrations (excluding motorcycles) decreased 13.8% from the previous year to a global total of 77.97 million units. Vehicle sales rose in Turkey (up 61.8% to 796,000 units), Egypt (up 28.8% to 220,000 units), and South Korea (up 6.2% to 1.91 million units).

NEW REGISTRATIONS OF MOTOR VEHICLES EXCLUDING MOTORCYCLES (SELECTED COUNTRIES)



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

In vehicle units

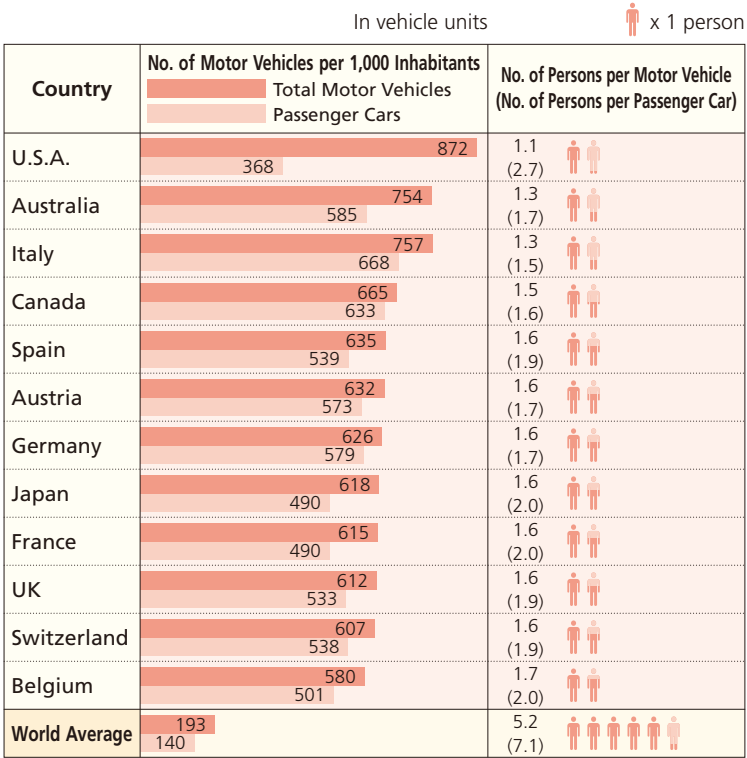
Country	2018			2019			2020		
	Passenger Cars	Commercial Vehicles	Total	Passenger Cars	Commercial Vehicles	Total	Passenger Cars	Commercial Vehicles	Total
Austria	341,068	52,970	394,038	320,381	51,553	371,934	257,721	44,002	301,723
Belgium	549,632	89,812	639,444	550,008	94,066	644,074	424,492	79,618	504,110
Czech Republic	261,437	20,456	281,893	249,915	31,508	281,423	202,971	25,863	228,834
Denmark	218,566	39,435	258,001	225,581	38,663	264,244	198,130	35,118	233,248
Finland	120,480	16,401	136,881	114,202	19,317	133,519	96,392	16,555	112,947
France	2,173,481	459,140	2,632,621	2,214,280	541,448	2,755,728	1,650,126	449,932	2,100,058
Germany	3,435,778	386,282	3,822,060	3,607,258	409,801	4,017,059	2,917,678	350,544	3,268,222
Hungary	136,601	23,053	159,654	157,900	32,184	190,084	128,021	25,947	153,968
Italy	1,910,025	211,756	2,121,781	1,916,949	215,681	2,132,630	1,381,496	183,174	1,564,670
Netherlands	443,531	79,339	522,870	446,057	92,682	538,739	357,996	72,215	430,211
Norway	147,929	38,907	186,836	133,964	44,866	178,830	124,424	36,139	160,563
Poland	531,889	101,395	633,284	555,598	100,660	656,258	428,347	81,806	510,153
Portugal	228,327	39,394	267,721	223,799	44,028	267,827	145,417	31,575	176,992
Romania	129,004	29,274	158,278	161,562	25,371	186,933	126,351	18,661	145,012
Slovakia	98,080	13,785	111,865	101,568	12,295	113,863	76,305	8,604	84,909
Spain	1,321,438	242,058	1,563,496	1,258,249	242,854	1,501,103	851,213	179,257	1,030,470
Sweden	353,729	64,361	418,090	356,036	62,442	418,478	292,024	38,191	330,215
UK	2,367,147	367,129	2,734,276	2,311,140	425,778	2,736,918	1,631,064	333,708	1,964,772
Russia	1,606,676	214,644	1,821,320	1,567,809	211,092	1,778,901	1,433,956	197,207	1,631,163
Switzerland	299,135	37,505	336,640	311,466	44,572	356,038	236,828	38,538	275,366
Turkey	486,321	155,220	641,541	387,256	104,691	491,947	610,109	186,091	796,200
Canada	577,711	1,407,281	1,984,992	496,846	1,440,372	1,937,218	318,750	1,208,830	1,527,580
U.S.A.	5,303,580	12,397,822	17,701,402	4,719,710	12,317,378	17,037,088	3,401,838	11,051,054	14,452,892
Mexico	883,043	538,415	1,421,458	764,175	595,709	1,359,884	532,097	444,276	976,373
Brazil	2,101,884	366,550	2,468,434	2,262,069	525,781	2,787,850	1,615,942	442,495	2,058,437
Argentina	610,943	162,698	773,641	282,299	126,527	408,826	223,438	110,407	333,845
China	23,709,782	4,370,795	28,080,577	21,472,092	4,324,839	25,796,931	20,177,731	5,133,338	25,311,069
India	3,394,756	1,005,380	4,400,136	2,962,115	854,743	3,816,858	2,433,464	505,189	2,938,653
Japan	4,391,160	880,907	5,272,067	4,301,091	894,125	5,195,216	3,809,981	788,634	4,598,615
South Korea	1,525,150	301,991	1,827,141	1,497,035	298,099	1,795,134	1,618,333	287,639	1,905,972
Malaysia	533,201	65,513	598,714	550,182	54,105	604,287	480,965	48,469	529,434
Indonesia	878,595	274,194	1,152,789	785,539	244,947	1,030,486	388,925	143,152	532,077
Thailand	729,709	357,220	1,086,929	468,638	538,914	1,007,552	343,494	448,652	792,146
Australia	873,713	247,683	1,121,396	799,263	263,604	1,062,867	676,804	240,164	916,968
Egypt	145,873	38,583	184,456	127,443	43,125	170,568	167,792	51,940	219,732
South Africa	365,242	186,984	552,226	355,378	181,233	536,611	247,571	130,361	377,932
Other	5,505,852	1,081,138	6,586,989	4,715,534	1,144,247	5,859,781	3,590,664	905,043	4,495,703
Grand Totals	68,690,468	26,365,470	95,055,937	63,730,387	26,693,300	90,423,687	53,598,850	24,372,388	77,971,234

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

Nearly 1.5 Billion Motor Vehicles in Use Worldwide

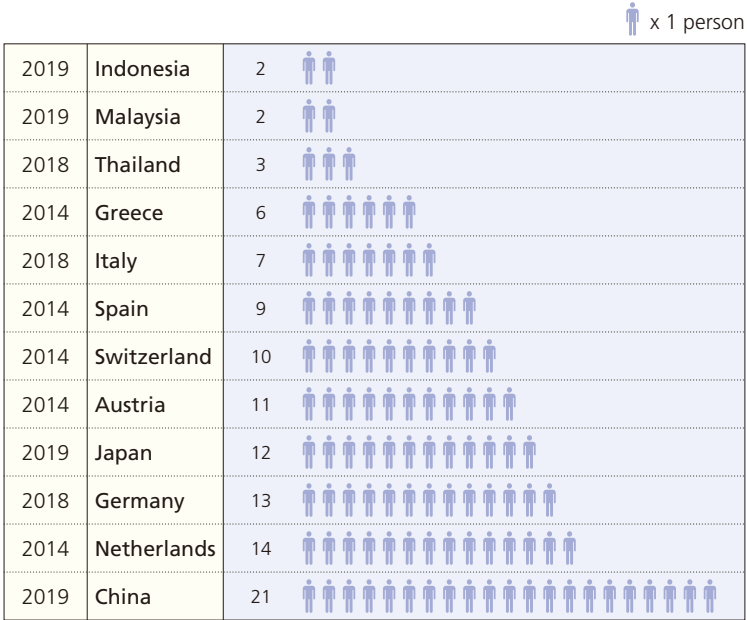
There were over 1.49 billion motor vehicles (excluding motorcycles) in use worldwide in 2019, equivalent to 193 motor vehicles per 1,000 inhabitants or one vehicle for every 5.2 persons. Motorcycle density in recent years has been particularly high in Indonesia and Malaysia, with one motorcycle in use for every two persons; in 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 2019)



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 2019)

In vehicle units

Country	Passenger Cars	Commercial Vehicles	Total
Germany	47,715,977	3,889,521	51,605,498
Italy	39,545,232	5,291,523	44,836,755
France	32,125,200	8,127,000	40,252,200
UK	35,732,000	5,277,100	41,009,100
Spain	25,008,216	4,455,093	29,463,309
Netherlands	8,938,572	1,191,865	10,130,437
Belgium	5,813,776	910,284	6,724,060
Austria	5,039,548	524,067	5,563,615
Sweden	4,887,904	684,158	5,572,062
Poland	24,455,500	4,190,200	28,645,700
Switzerland	4,623,952	597,934	5,221,886
Turkey	12,503,049	5,413,601	17,916,650
Russia	52,955,700	8,968,100	61,923,800
U.S.A.	121,231,000	165,653,000	286,884,000
Canada	23,600,000	1,221,000	24,821,000
Mexico	33,007,642	11,859,671	44,867,313
Argentina	11,067,300	3,576,300	14,643,600
Brazil	37,720,122	7,758,527	45,478,649
Japan	62,140,475	16,276,116	78,416,591
China	212,395,031	41,484,969	253,880,000
South Korea	19,129,151	4,504,992	23,634,143
India	34,503,600	26,827,000	61,330,600
Thailand	10,505,777	8,090,971	18,596,748
Indonesia	17,238,361	10,549,499	27,787,860
Australia	14,679,249	4,245,201	18,924,450
South Africa	9,642,200	4,452,800	14,095,000
Other	177,323,002	52,496,575	229,819,577
Grand Totals	1,083,527,536	408,517,067	1,492,044,603

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

MOTORCYCLES IN USE WORLDWIDE

In vehicle units

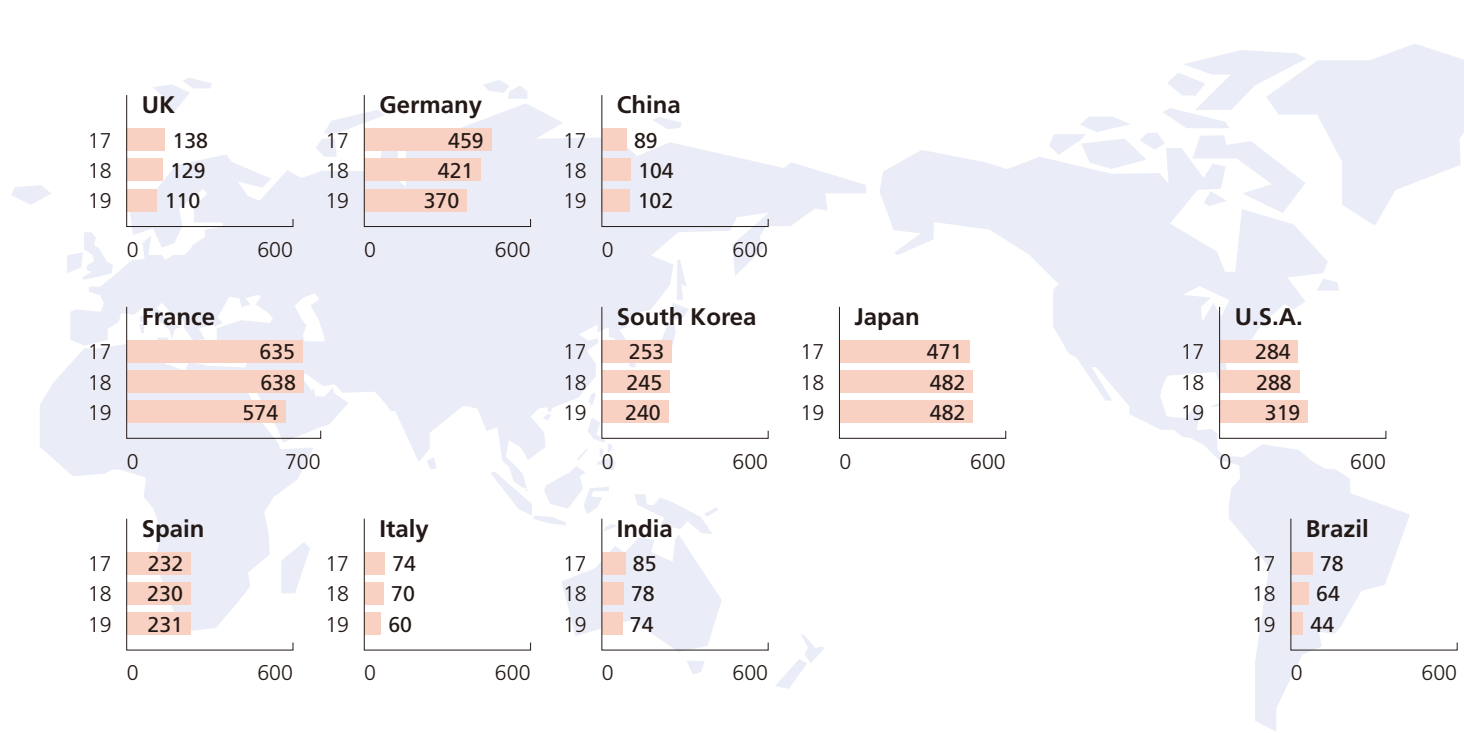
Year	Country/Territory	Total
2018	Italy	8,720,733
2014	Spain	5,033,209
2014	France	3,015,223
2014	UK	1,328,300
2014	Netherlands	1,228,147
2014	Switzerland	852,567
2014	Austria	755,447
2014	Poland	1,311,184
2014	Czech Republic	1,016,978
2019	Germany	6,220,950
2014	Greece	1,802,929
2019	Malaysia	14,322,030
2018	Thailand	21,079,937
2019	Taiwan	13,992,922
2019	Indonesia	126,588,509
2019	China	67,655,570
2019	Japan	10,539,849
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 the U.S.A., Spain, and Japan

Motor vehicle exports (excluding motorcycles) in 2019 increased over the previous year in the United States (up 10.8% to 3.19 million units), Spain (up 0.2% to 2.31 million units), and Japan (up 0.01% to 4.82 million units).

MOTOR VEHICLE EXPORTS (MAJOR EXPORTING COUNTRIES)



MOTOR VEHICLE EXPORTS (MAJOR EXPORTING COUNTRIES)

In vehicle units

Country	2017			2018			2019		
	Passenger Cars	Commercial Vehicles	Total	Passenger Cars	Commercial Vehicles	Total	Passenger Cars	Commercial Vehicles	Total
Japan	4,218,429	487,419	4,705,848	4,357,782	459,688	4,817,470	4,372,645	445,487	4,818,132
U.S.A.	2,221,875	617,586	2,839,461	2,344,811	535,340	2,600,220	2,880,151	592,028	3,192,248
Germany	4,378,108	210,417	4,588,525	3,992,724	219,381	4,212,105	3,487,321	211,739	3,699,060
UK	1,334,538	48,899	1,383,437	1,237,608	50,320	1,287,928	1,055,997	46,110	1,102,107
France	5,695,129	658,225	6,353,354	5,303,355	1,073,039	6,376,394	4,674,081	1,063,544	5,737,625
Italy	418,324	324,094	742,418	382,535	316,785	699,320	292,415	312,126	604,541
Spain	1,866,931	451,286	2,318,217	1,873,085	431,333	2,304,418	1,867,477	442,593	2,310,070
Brazil	625,186	159,563	784,749	501,124	142,297	643,421	351,373	88,975	440,348
South Korea	2,415,948	114,246	2,530,194	2,342,292	107,359	2,449,651	2,313,038	88,345	2,401,383
China	639,167	251,730	890,897	757,525	283,188	1,040,713	724,826	299,354	1,024,180
India	748,366	96,865	845,231	676,192	99,933	776,125	677,311	60,713	738,024

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

MOTORCYCLE EXPORTS (MAJOR EXPORTING COUNTRIES/TERRITORY)

In vehicle units

Country/Territory	2017	2018	2019
	Total	Total	Total
Japan	463,123	456,758	396,379
China	7,143,732	6,958,643	6,755,471
Taiwan	337,490	333,769	323,967
Indonesia	431,187	627,421	—
India	2,815,003	3,280,841	3,520,376

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

Automobile Customs Tariffs, EPAs-FTAs

Following 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 2021

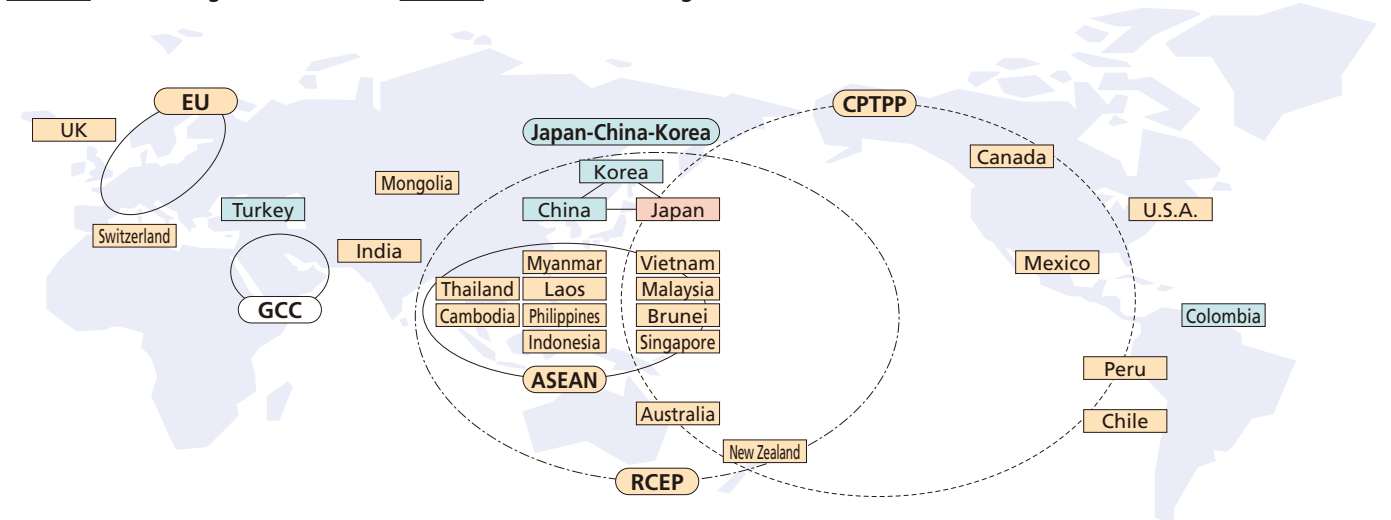
	Passenger Cars	Trucks	Buses	Auto Parts, Etc. (including vehicle bodies)
Japan	None	None	None	None
U.S.A.	2.5%	25% Cab chassis, from 5t up to 20t in GVW: 4%	2%	2.5%
China	15%	15%	15%	6%

Source: Japan Automobile Manufacturers Association

● STATUS OF JAPAN'S ENGAGEMENT IN EPAs/FTAs

EPA/FTA signed or in force EPA/FTA under negotiation/other

As of March 2021



Notes: 1. Japan-ASEAN EPA investment services negotiations have been substantively concluded and the EPA will come into force once it is ratified by all ASEAN member states. 2. Negotiations are postponed/suspended with GCC, Korea, and Canada. 3. It has been decided to begin negotiations with the UK towards its participation in CPTPP. 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.	[6.0%] To be abolished in 11 years.
	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.

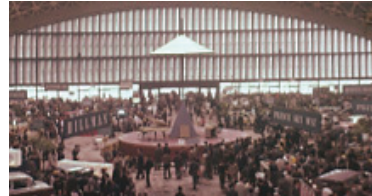
Note: Figures in brackets represent tariff rates imposed prior to reduction/abolition.

Source: Japan Automobile Manufacturers Association



The 1st Tokyo Motor Show, Hibiya Park, 1954

In 1954, as Japan's post-war reconstruction was nearing completion, the first Tokyo Motor Show was held at Hibiya Park in central Tokyo, premised on the notion that an international motor show was needed to resuscitate the Japanese motor vehicle industry.

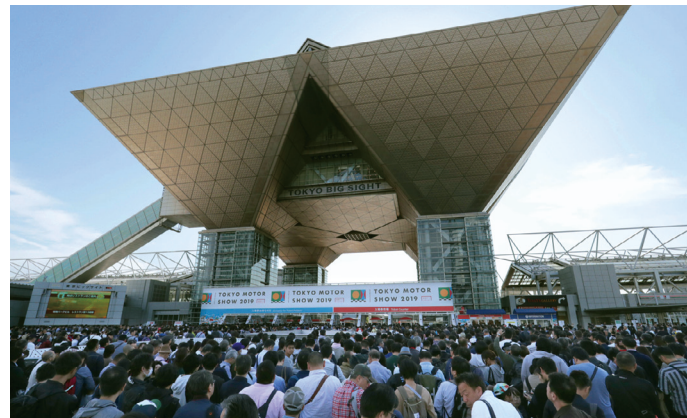


The 6th Tokyo Motor Show,
Japan Trade Center, 1959

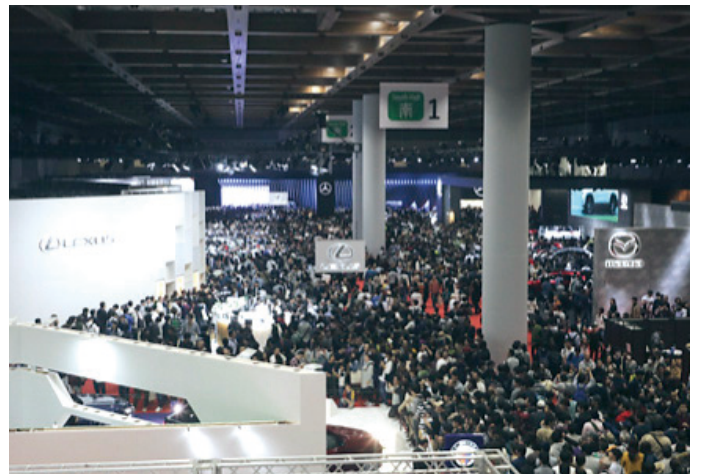


The 28th Tokyo Motor Show,
Makuhari Messe, 1989

From that point on, the Tokyo Motor Show grew in step with the development of Japan's automobile industry. In 1959 the show moved to the Japan Trade Center located in Tokyo's Harumi area, then, thirty years later, in 1989, to the Nippon Convention Center (Makuhari Messe) in Chiba Prefecture. In 2011 it moved again, to its current venue at Tokyo Big Sight (officially known as Tokyo International Exhibition Center) in Ariake, where it has established itself as a top-level international motor show on a par with those in Europe and the United States.



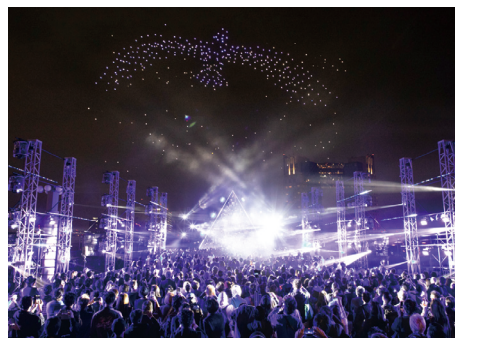
The 46th Tokyo Motor Show, Tokyo Big Sight, 2019



The 46th Tokyo Motor Show, the event's most recent edition, held in 2019, was conceived as a showcase for new mobility, marking the automotive industry's strategic transition into the future. The show's organizers expanded the scope of participation to include representatives of other industries, thereby turning the exhibition into a multi-industry event, with 192 companies and organizations addressing the theme of future mobility. A total of 1.3 million people visited the 46th Tokyo Motor Show, with attendance rates for children, young people, and women showing significant increases. As visitors experienced first-hand the show's wide-ranging programs and activities, visible delight was also on display.



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A new edition of the show was scheduled to be held in the autumn of 2021, but owing to the global COVID-19 pandemic it was decided that ensuring a safe and secure environment for visitors would be difficult. Organizers are now working towards holding the next show in the autumn of 2023 on a "green and digital" theme, with expanded multi-industry participation in what promises to be a thoroughly exciting event. Stay tuned!

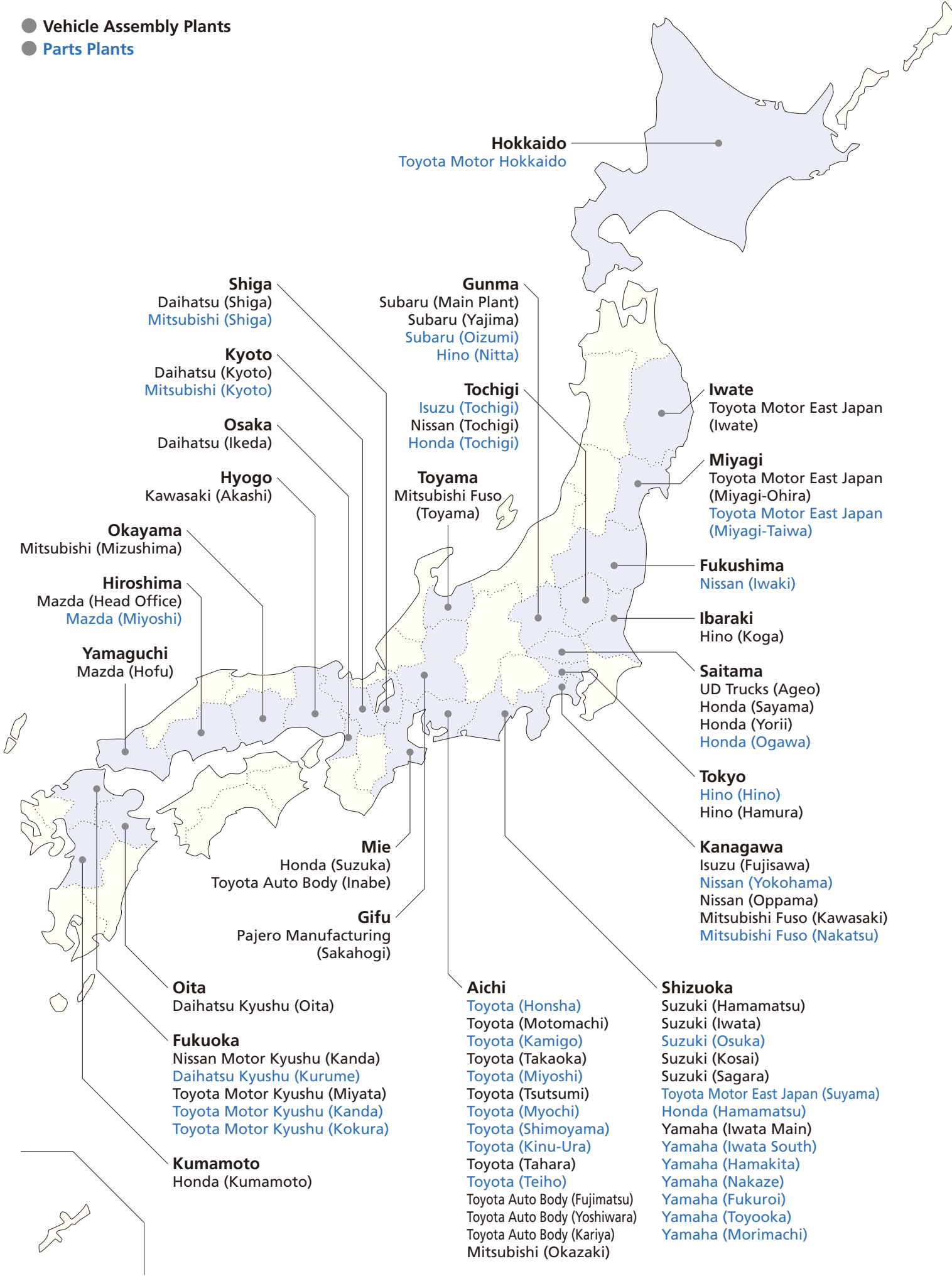
*The Tokyo Motor Show Drone Show was performed with the permission, approval and guidance of the East Japan Civil Aviation Bureau of the Ministry of Land, Infrastructure, Transport and Tourism, the Tokyo Coast Guard Office of the 3rd Regional Coast Guard Headquarters of the Japan Coast Guard, and the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

	<p>Daihatsu Motor Co., Ltd.</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 http://www.daihatsu.co.jp/ http://www.daihatsu.com</p>
	<p>HINO Motors, Ltd.</p> <p>Head Office : 1-1 Hinodai 3-chome, Hino, Tokyo 191-8660 Tel: (042) 586-5111 http://www.hino-global.com</p>
	<p>HONDA MOTOR CO., LTD.</p> <p>Head Office : 1-1 Minami-Aoyama 2-chome, Minato-ku, Tokyo 107-8556 Tel: (03) 3423-1111 https://www.honda.co.jp/</p>
	<p>Isuzu Motors Limited</p> <p>Head Office : 26-1 Minami-Oi 6-chome, Shinagawa-ku, Tokyo 140-8722 Tel: (03) 5471-1141 http://www.isuzu.co.jp/world/</p>
	<p>Kawasaki Motors, Ltd.</p> <p>Head Office: 1-1 Kawasaki-cho, Akashi, Hyogo 673-8666 Tel: (078) 921-1301 https://www.kawasaki-cp.khi.co.jp/corp_en/</p>
	<p>MAZDA MOTOR CORPORATION</p> <p>Head Office : 3-1 Shinchu, 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 http://www.mazda.co.jp/ http://www.mazda.com/</p>
	<p>MITSUBISHI MOTORS CORPORATION</p> <p>Head Office : 1-21 Shibaura 3-chome, Minato-ku, Tokyo 108-8410 Tel: (03) 3456-1111 https://www.mitsubishi-motors.co.jp/ https://www.mitsubishi-motors.com/en/</p>
	<p>Mitsubishi Fuso Truck and Bus Corporation</p> <p>Head Office : 10 Ohkura-cho, Nakahara-ku, Kawasaki, Kanagawa 211-8522 Tel: (044) 330-7700 http://www.mitsubishi-fuso.com/</p>

Note: Manufacturers are listed in alphabetical order.

	<p>Nissan Motor Co., Ltd.</p> <p>Global Headquarters : 1-1 Takashima 1-chome, Nishi-ku, Yokohama-shi, Kanagawa 220-8686 Tel: (045) 523-5523 http://www.nissan.co.jp/ http://www.nissan-global.com/EN/</p>
	<p>Subaru Corporation</p> <p>Head Office : Ebisu Subaru Bldg., 20-8 Ebisu 1-chome, Shibuya-ku, Tokyo 150-8554 Tel: (03) 6447-8000 https://www.subaru.co.jp/</p>
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	<p>TOYOTA MOTOR CORPORATION</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 https://global.toyota/en</p>
	<p>UD Trucks Corporation</p> <p>Head Office : 1-1 Ageo, Saitama 362-8523 Tel: (0120) 67-2301 https://www.udtrucks.com/ja-jp/home https://www.udtrucks.com/</p>
	<p>YAMAHA MOTOR CO., Ltd.</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 http://global.yamaha-motor.com/</p>
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- Vehicle Assembly Plants
- Parts Plants



- 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)
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- Japan Automobile Recycling Promotion Center (JARC)
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- All Japan Railway-Freight Forwarders Association
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- 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



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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/>