THE MOTOR INDUSTRY OF JAPAN 2019

JAPAN AUTOMOBILE MANUFACTURERS ASSOCIATION, INC.

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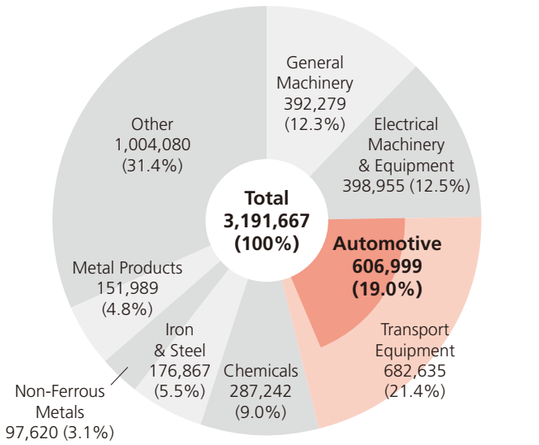
Automotive Shipments Total 60.7 Trillion Yen; Equipment Investments, 1.3 Trillion Yen; R&D Expenditures, 2.9 Trillion Yen

Automotive shipments (both domestic and export shipments, including motorcycles, auto parts, etc.) in value terms reached 60.7 trillion yen in 2017, up 5.1% from the previous year, accounting for 19.0% of the total value of Japan's manufacturing shipments and 41.2% of the value of the machinery industries' combined shipments. Investments in equipment by the automobile industry in 2017 totalled 1.3 trillion yen and its research and development expenditures reached 2.9 trillion yen, up 4.4% from the previous year; 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 16 trillion yen in 2018 and auto-related employment in Japan totalling 5.46 million people, the automotive industry is one of the Japanese economy's core industrial sectors.

SHIPMENTS OF MAJOR MANUFACTURING SECTORS IN VALUE TERMS (2017)

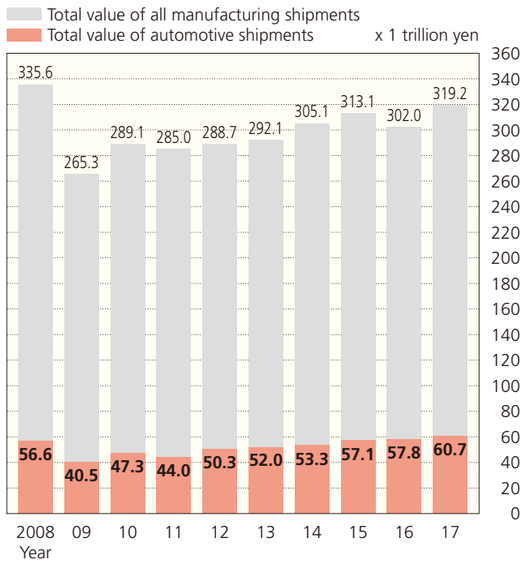
x 100 million yen



Breakdown of automotive shipments:

- Automobiles (including motorcycles) 249,548
- Auto bodies and trailers 6,904
- Automotive parts and accessories 350,546

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



SHIPMENTS OF MAJOR MANUFACTURING SECTORS IN VALUE TERMS, 1970-2017

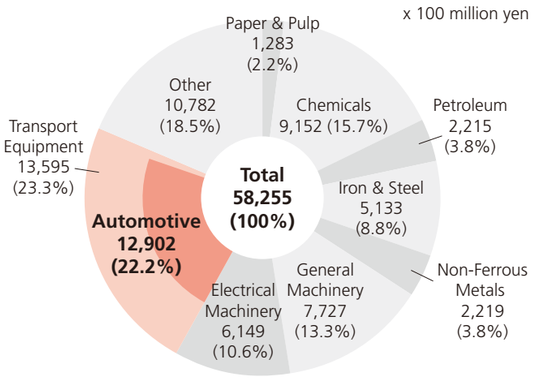
x 100 million yen

Year	Chemicals	Iron & Steel	Non-Ferrous Metals	Metal Products	Machinery Industries: General Machinery	Machinery Industries: Electrical Machinery & Equipment	Machinery Industries: Transport Equipment	Machinery Industries: Transport Equipment: Automotive	Machinery Industries: Subtotal	Other	Total	Automotive Shipments: As % of Value of Machinery Shipments	Automotive Shipments: As % of Total Value of Manufacturing Shipments
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
2008	281,299	243,322	104,805	151,492	402,477	518,797	637,666	566,053	1,558,940	1,015,930	3,355,788	36.3	16.9
2009	242,757	159,884	69,400	124,267	289,320	400,593	471,866	404,915	1,161,779	894,503	2,652,590	34.9	15.3
2010	262,120	181,463	89,114	122,920	306,186	442,848	542,136	472,962	1,291,170	944,290	2,891,077	36.6	16.4
2011	263,512	186,656	90,225	121,277	322,495	403,789	505,870	439,592	1,232,154	955,863	2,849,688	35.7	15.4
2012	260,379	180,121	89,228	128,607	330,816	369,426	564,858	502,627	1,265,100	963,841	2,887,276	39.7	17.4
2013	274,092	179,053	88,059	130,606	320,911	368,283	582,032	519,710	1,271,226	977,885	2,920,921	40.9	17.8
2014	281,230	192,022	94,220	139,328	337,273	394,772	600,633	533,101	1,332,678	1,011,922	3,051,400	40.0	17.5
2015	286,222	178,420	96,795	143,057	359,715	408,060	646,539	570,524	1,414,314	1,012,477	3,131,285	40.3	18.2
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

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. 2017 data includes preliminary figures. *Source* for statistical data on this page: Census of Manufactures, *Ministry of Economy, Trade and Industry*

INVESTMENTS IN EQUIPMENT OF MAJOR MANUFACTURING SECTORS (FY 2017)

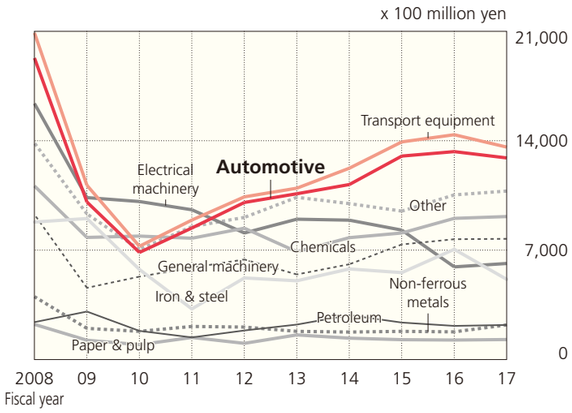
x 100 million yen



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, 2008-2017

x 100 million yen



INVESTMENTS IN EQUIPMENT OF MAJOR MANUFACTURING SECTORS

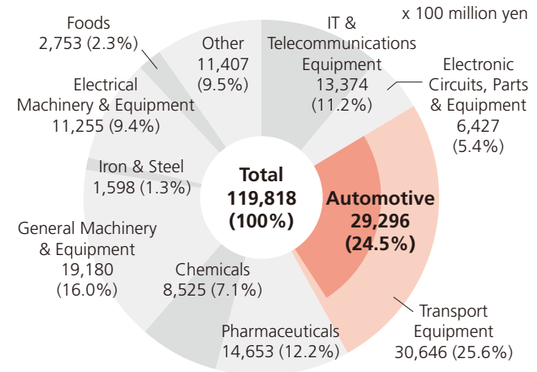
x 100 million yen

Fiscal year	Paper & Pulp	Chemicals	Petroleum	Iron & Steel	Non-Ferrous Metals	General Machinery	Electrical Machinery	Transport Equipment	Automotive	Other	Total
2008	2,254	11,109	2,396	8,800	4,026	9,281	16,383	20,900	19,292	13,856	89,005
2009	1,239	7,816	3,074	9,025	1,997	4,591	10,363	11,150	10,080	9,318	58,573
2010	955	7,902	1,837	5,767	1,808	5,307	10,113	7,249	6,855	7,048	47,986
2011	1,415	7,765	1,420	3,242	2,120	5,883	9,585	8,928	8,420	8,508	48,866
2012	1,040	8,407	1,863	5,224	2,081	6,405	8,100	10,412	10,053	9,098	52,630
2013	1,580	6,900	2,241	5,042	1,807	5,448	8,983	10,966	10,611	10,381	53,348
2014	1,372	7,801	2,841	5,799	1,763	6,100	8,920	12,244	11,199	9,980	56,820
2015	1,274	8,100	2,370	5,565	1,807	7,367	8,285	13,928	13,021	9,500	58,196
2016	1,252	9,036	2,156	7,055	1,775	7,702	5,933	14,387	13,306	10,537	59,833
2017	1,283	9,152	2,215	5,133	2,219	7,727	6,149	13,595	12,902	10,782	58,255

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

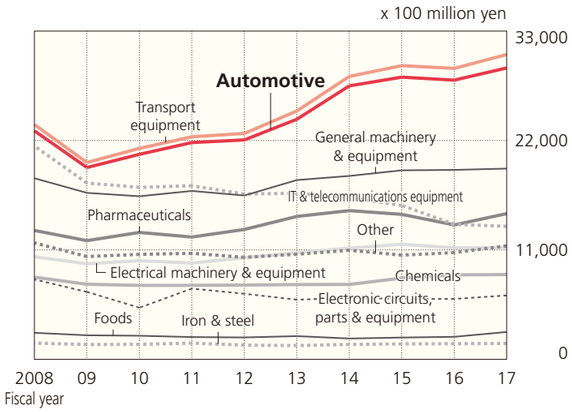
R&D EXPENDITURES OF MAJOR MANUFACTURING SECTORS (FY 2017)

x 100 million yen



R&D EXPENDITURES OF MAJOR MANUFACTURING SECTORS, 2008-2017

x 100 million yen



R&D EXPENDITURES OF MAJOR MANUFACTURING SECTORS

x 100 million yen

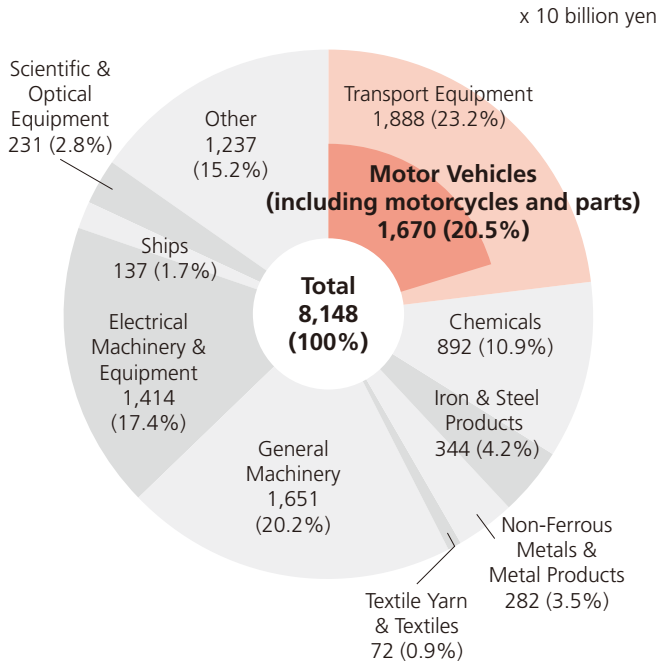
Fiscal year	IT & Telecommunications Equipment	Electronic Circuits, Parts & Equipment	Transport Equipment	Automotive	Pharma-ceuticals	Chemicals	General Machinery & Equipment	Iron & Steel	Electrical Machinery & Equipment	Foods	Other	Total
2008	21,441	8,032	23,608	22,970	12,956	8,260	18,207	1,634	10,314	2,670	11,709	118,831
2009	17,724	6,783	19,789	19,288	11,937	7,552	16,739	1,493	9,610	2,420	10,339	104,386
2010	17,293	5,191	21,213	20,613	12,760	7,439	16,397	1,511	9,922	2,375	10,556	104,657
2011	17,451	7,115	22,378	21,796	12,299	7,441	16,933	1,633	9,681	2,241	10,661	107,833
2012	16,623	6,595	22,711	22,062	13,061	7,469	16,472	1,432	10,214	2,204	10,260	107,041
2013	16,708	5,998	24,972	24,137	14,371	7,519	18,027	1,392	10,724	2,337	10,567	112,615
2014	16,238	6,181	28,447	27,495	14,953	7,534	18,440	1,501	11,189	2,097	10,971	117,551
2015	15,476	6,093	29,529	28,372	14,577	8,166	19,005	1,552	11,569	2,195	10,479	118,641
2016	13,572	6,075	29,255	28,071	13,516	8,494	19,047	1,577	11,211	2,267	10,734	115,748
2017	13,374	6,427	30,646	29,296	14,653	8,525	19,180	1,598	11,255	2,753	11,407	119,818

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

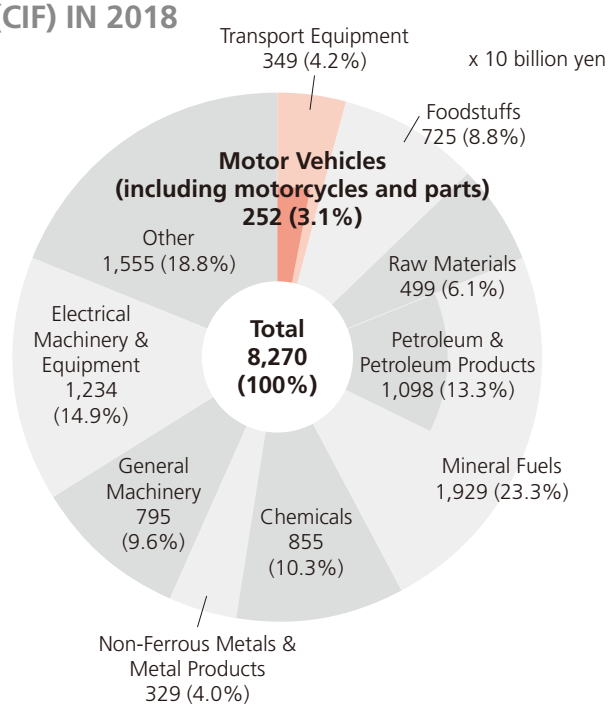
In Value Terms, Motor Vehicle Exports Total 16.7 Trillion Yen; Imports, 2.5 Trillion Yen

In 2018 Japan's gross exports and imports increased from the previous year, by 4.1% and 9.7% respectively. In value terms, automotive exports grew 3.7% from 2017 to 16.7 trillion yen, and automotive imports expanded 7.7% year-on-year to 2.5 trillion yen.

EXPORTS BY PRINCIPAL COMMODITY (FOB) IN 2018



IMPORTS BY PRINCIPAL COMMODITY (CIF) IN 2018



AUTOMOTIVE EXPORTS IN VALUE TERMS (FOB)

x 100 million yen

Year	Motor Vehicles	Chg. (%)	Passenger Cars, Trucks, Buses	Auto Parts	Motorcycles & Motorcycle Parts	Exports Total	Chg. (%)
2009	93,679	53.5	66,933	23,089	3,657	541,706	66.9
2010	125,956	134.5	91,741	30,833	3,382	673,996	124.4
2011	115,417	91.6	82,042	29,972	3,403	655,465	97.3
2012	127,521	110.5	92,250	32,051	3,220	637,476	97.3
2013	142,411	111.7	104,125	34,762	3,524	697,742	109.5
2014	147,849	103.8	109,194	34,750	3,905	730,930	104.8
2015	158,912	107.5	120,463	34,830	3,619	756,139	103.4
2016	151,175	95.1	113,329	34,617	3,229	700,358	92.6
2017	161,092	106.6	118,254	38,966	3,872	782,865	111.8
2018	166,972	103.7	123,072	39,909	3,990	814,788	104.1

AUTOMOTIVE IMPORTS IN VALUE TERMS (CIF)

x 100 million yen

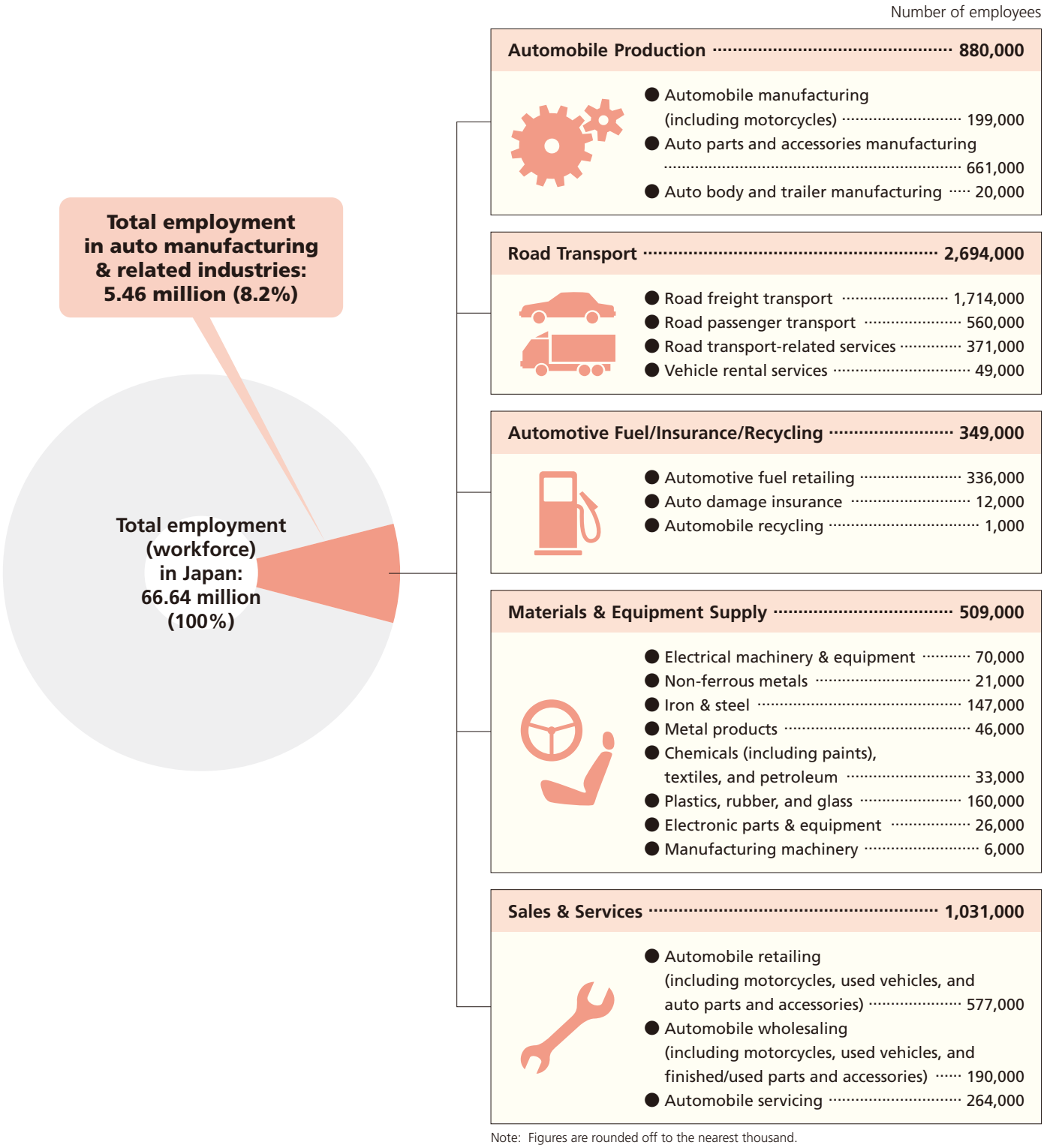
Year	Motor Vehicles	Chg. (%)	Passenger Cars, Trucks, Buses	Auto Parts	Motorcycles & Motorcycle Parts	Imports Total	Chg. (%)
2009	8,982	59.3	4,549	3,696	736	514,994	65.2
2010	11,518	128.2	5,958	4,879	682	607,650	118.0
2011	12,805	111.2	7,352	4,717	736	681,112	112.1
2012	15,506	121.1	9,082	5,549	875	706,886	103.8
2013	18,948	122.2	10,857	6,981	1,109	812,425	114.9
2014	20,925	110.4	11,623	8,148	1,154	859,091	105.7
2015	21,261	101.6	11,398	8,770	1,093	784,055	91.3
2016	21,023	98.9	11,781	8,329	913	660,420	84.2
2017	23,419	111.4	13,070	9,328	1,021	753,792	114.1
2018	25,223	107.7	14,284	9,861	1,079	827,033	109.7

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

Auto-Related Employment Totals 5.46 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 5.46 million people.

EMPLOYMENT IN THE AUTOMOBILE MANUFACTURING AND RELATED INDUSTRIES



Note: Figures are rounded off to the nearest thousand.

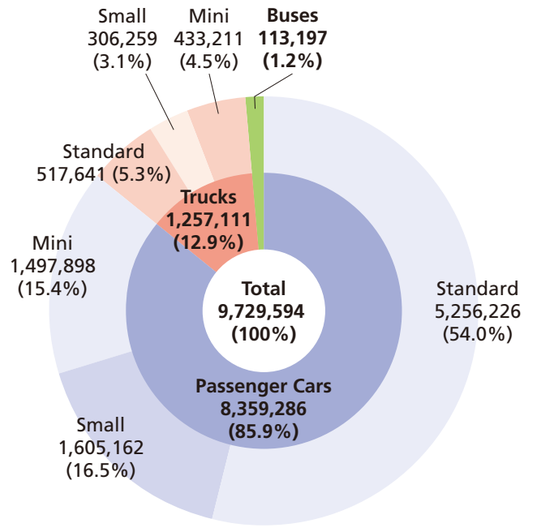
Sources: Industrial Statistics, Labor Force Survey, Input-Output Tables for Japan, *Ministry of Internal Affairs and Communications' Statistics Bureau; Ministry of Economy, Trade and Industry*

Motor Vehicle Production Reaches 9.73 Million Units

In 2018 motor vehicle production in Japan totalled 9.73 million units, up 0.4% from 2017, expanding for the second consecutive year. Passenger car production rose 0.1% to a total of 8.36 million units. Within that category, standard cars climbed 2.1% to 5.26 million units and minicars grew 0.9% to 1.50 million units, but small cars fell 6.5% to 1.61 million units. Meanwhile, truck production increased 3.1% from 2017 to 1.26 million units, whereas bus production decreased 8.0% to 113,000 units.

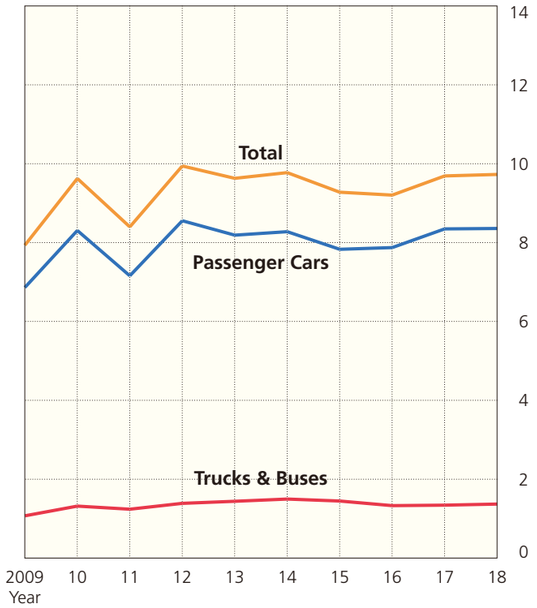
MOTOR VEHICLE PRODUCTION BY TYPE IN 2018

In vehicle units



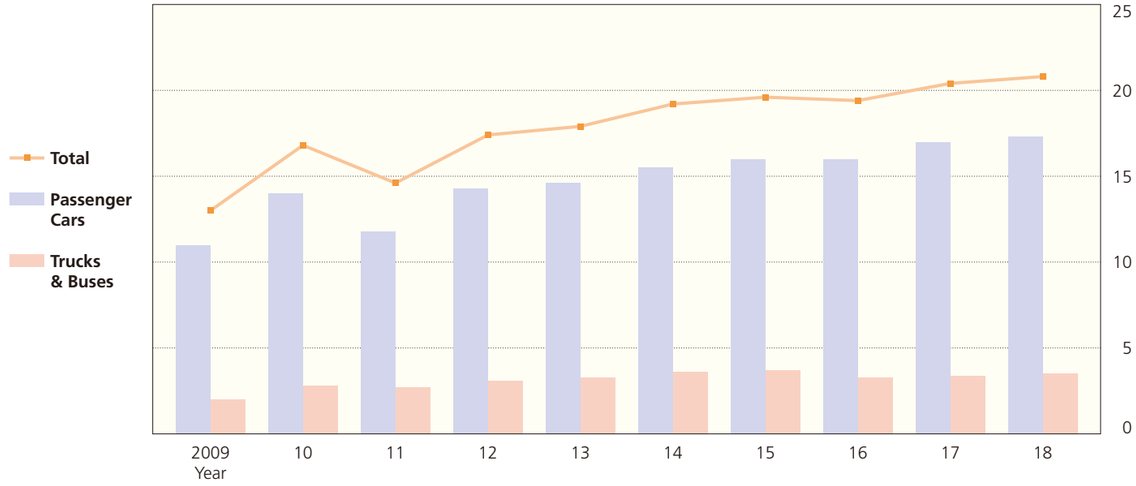
TRENDS IN MOTOR VEHICLE PRODUCTION

x 1 million units



TRENDS IN MOTOR VEHICLE PRODUCTION IN VALUE TERMS

x 1 trillion yen



MOTOR VEHICLE PRODUCTION IN VALUE TERMS

x 1 million yen

Year	Passenger Cars				Trucks					Buses			Total
	Standard	Small	Mini	Subtotal	Standard	Small	Mini	Tractors	Subtotal	Large	Small	Subtotal	
1985	895,041	7,049,323	85,925	8,030,289	1,793,000	1,519,934	679,498	46,745	4,039,177	103,053	101,007	204,060	12,273,526
1990	3,717,356	8,676,715	572,188	12,966,259	1,953,924	1,180,028	591,144	64,913	3,790,009	134,015	66,988	201,003	16,957,271
1995	5,147,637	4,869,427	790,303	10,807,367	1,619,428	849,511	510,579	124,764	3,104,282	107,647	89,441	197,088	14,108,737
2000	6,640,075	4,298,370	1,237,605	12,176,050	1,111,558	543,408	357,765	45,453	2,058,184	80,897	109,007	189,904	14,424,138
2005	9,352,545	4,178,641	1,169,871	14,701,057	1,916,692	588,224	357,615	104,567	2,967,098	127,605	163,069	290,674	17,958,829
2009	7,261,654	2,548,371	1,155,681	10,965,706	1,127,974	312,497	281,888	34,778	1,757,137	109,723	166,115	275,838	12,998,681
2010	10,239,303	2,609,861	1,207,423	14,056,587	1,684,489	358,081	323,800	75,944	2,442,314	118,300	211,359	329,659	16,828,560
2011	8,451,638	2,343,337	1,045,460	11,840,435	1,713,798	351,515	285,454	89,976	2,440,743	97,157	199,301	296,458	14,577,636
2012	9,683,441	3,091,067	1,486,926	14,261,434	1,954,449	422,502	302,836	106,209	2,785,996	120,992	237,199	358,191	17,405,621
2013	10,422,008	2,628,986	1,579,510	14,630,504	1,987,340	479,914	312,959	102,073	2,882,286	119,670	290,001	409,671	17,922,461
2014	11,110,107	2,636,872	1,795,440	15,542,419	2,189,242	546,377	313,522	118,091	3,167,232	124,114	318,410	442,524	19,152,175
2015	12,047,649	2,458,198	1,473,103	15,978,950	2,189,038	576,037	300,368	131,002	3,196,445	139,614	328,498	468,112	19,643,507
2016	12,321,649	2,438,906	1,280,853	16,041,408	1,888,981	566,781	290,991	129,781	2,876,534	172,906	299,220	472,126	19,390,068
2017	12,958,155	2,516,379	1,517,786	16,992,320	1,986,030	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	571,108	359,483	128,658	3,067,189	138,240	275,391	413,631	20,793,185

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. (%)	
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
2009	3,459,589	2,145,279	1,257,293	6,862,161	69.1	371,686	215,139	398,276	985,101	65.3	86,795	62.4	7,934,057	68.5	2009
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

Notes: 1. Passenger cars and trucks are classified under Japan's Road Vehicles Act in three categories, based primarily on engine capacity: "standard" (over 2,000cc), "small" (661cc-2,000cc), and "mini" (660cc and under); see page 47 for details. 2. KD sets have been excluded since 1979; they represent less than 60% of the cost of compositional components per vehicle and have been treated as components since 1988. 3. "Chg. (%)" means change from the previous year (with the previous year's result indexed at 100).

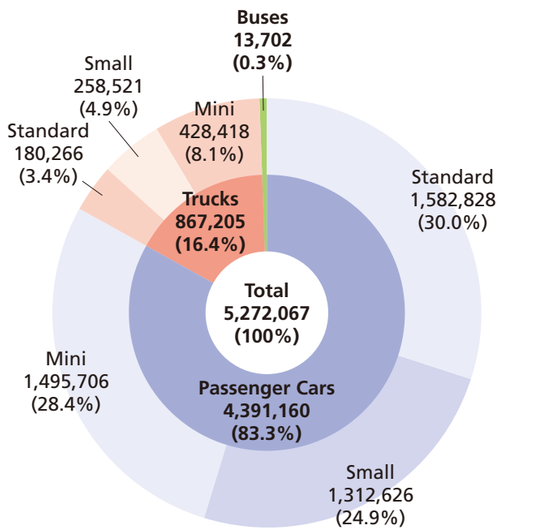
Sources: Japan Automobile Manufacturers Association; Current Survey of Production, *Ministry of Economy, Trade and Industry*

Motor Vehicle Sales Total 5.27 Million Units

Passenger car and commercial vehicle demand in Japan in 2018 totalled 5.27 million units, a 0.7% increase over the previous year. Total passenger car sales grew 0.1% to 4.39 million units, with standard cars rising 2.2% to 1.58 million units and minicars climbing 3.6% to 1.50 million units, but small cars dropping 5.9% to 1.31 million units. Meanwhile, sales of trucks increased 4.2% over 2017 to 867,000 units, whereas sales of buses declined 12.1% to 14,000 units.

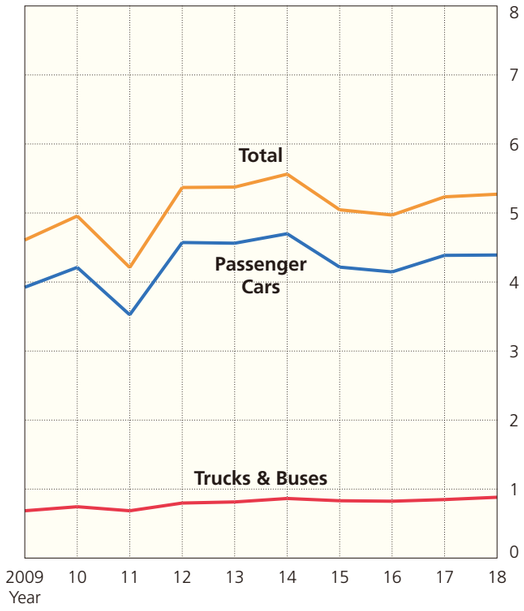
NEW MOTOR VEHICLE REGISTRATIONS BY TYPE IN 2018

In vehicle units



TRENDS IN NEW MOTOR VEHICLE REGISTRATIONS

x 1 million units



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

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

In vehicle units

Year	Passenger Cars					Trucks					Buses				Total	Chg. (%)	Total Vehicles	Chg. (%)	Total Mini-Vehicles	Chg. (%)	Year
	Standard	Small	Mini	Subtotal	Chg. (%)	Standard	Small	Mini	Subtotal	Chg. (%)	Large	Small	Subtotal	Chg. (%)							
1970	9,068	1,652,899	717,170	2,379,137	116.8	168,086	986,673	538,743	1,693,502	95.6	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
2009	1,160,175	1,480,137	1,283,429	3,923,741	92.8	87,692	180,509	404,742	672,943	80.2	4,234	8,338	12,572	82.0	4,609,256	90.7	2,921,085	90.9	1,688,171	90.3	2009
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

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).

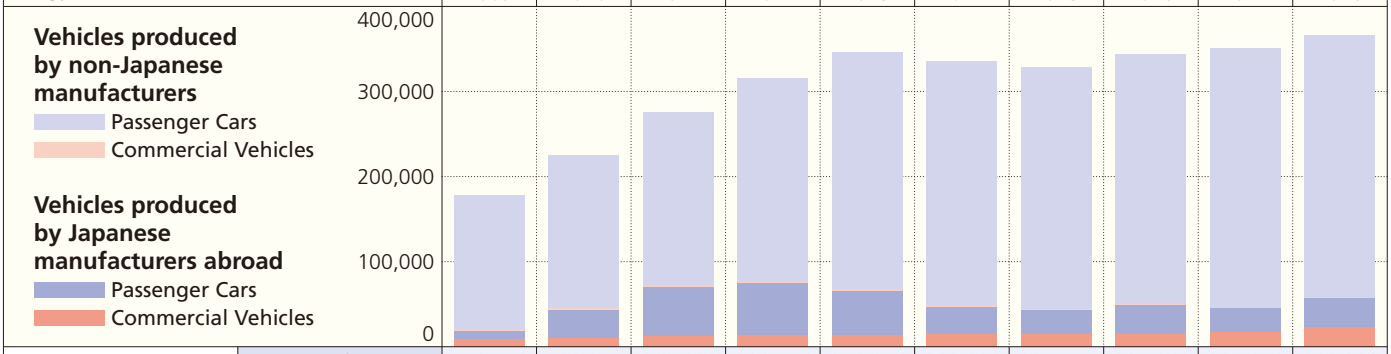
Sources: Japan Automobile Dealers Association; Japan Mini Vehicles Association

366,000 Imported Vehicles Sold in Total

Imported vehicle sales in Japan in 2018 totalled 366,000 units, up 4.3% from the previous year, with passenger cars rising 2.8% to 343,000 units and commercial vehicles (trucks and buses) surging 33.7% to 23,000 units. Meanwhile, sales of used imported vehicles increased 0.9% to 565,000 units, with used imported passenger cars climbing 1.0% to 546,000 units but used imported trucks declining 0.6% to 16,000 units.

TRENDS IN IMPORTED MOTOR VEHICLE SALES

In vehicle units



Year		2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Vehicles produced by non-Japanese manufacturers	Passenger Cars	159,143	180,255	203,800	239,546	278,846	288,830	284,471	294,060	305,043	308,389
	Commercial Vehicles	1,761	1,827	2,057	2,017	1,694	1,366	1,025	1,054	1,045	1,016
	Total	160,904	182,082	205,857	241,563	280,540	290,196	285,496	295,114	306,088	309,405
Vehicles produced by Japanese manufacturers abroad	Passenger Cars	8,746	33,028	56,907	61,048	52,440	30,847	28,610	33,547	28,408	34,381
	Commercial Vehicles	8,877	9,973	12,880	13,382	13,153	14,917	14,516	15,012	16,524	22,480
	Total	17,623	43,001	69,787	74,430	65,593	45,764	43,126	48,559	44,932	56,861
Passenger Cars Total		167,889	213,283	260,707	300,594	331,286	319,677	313,081	327,607	333,451	342,770
Commercial Vehicles Total		10,638	11,800	14,937	15,399	14,847	16,283	15,541	16,066	17,569	23,496
Grand Totals		178,527	225,083	275,644	315,993	346,133	335,960	328,622	343,673	351,020	366,266
Chg. (%)		81.4	126.1	122.5	114.6	109.5	97.1	97.8	104.6	102.1	104.3

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
2009	145,687	63.8	9,088	593	155,368	63.8	367,727
2010	230,791	158.4	11,922	780	243,493	156.7	353,260
2011	273,798	118.6	14,185	816	288,799	118.6	386,949
2012	333,380	121.8	15,107	948	349,435	121.0	421,991
2013	343,730	103.1	16,255	1,348	361,333	103.4	438,737
2014	336,764	98.0	16,662	1,278	354,704	98.2	410,143
2015	320,295	95.1	15,873	820	336,988	95.0	353,519
2016	331,207	103.4	17,455	651	349,313	103.7	341,254
2017	336,950	101.7	20,091	672	357,713	102.4	458,415
2018	358,221	106.3	26,633	839	385,693	107.8	540,008

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. (%)
2009	470,986	93.3	12,547	100.9	10,083	75.9	165	493,781	93.0
2010	461,050	97.9	13,381	106.6	7,878	78.1	182	482,491	97.7
2011	462,435	100.3	14,370	107.4	6,756	85.8	164	483,725	100.3
2012	487,675	105.5	14,636	101.9	5,469	81.0	248	508,028	105.0
2013	487,750	100.0	15,428	105.4	4,724	86.4	220	508,122	100.0
2014	485,055	99.4	15,156	98.2	3,963	83.9	185	504,359	99.3
2015	495,170	102.1	15,373	101.4	3,649	92.1	171	514,363	102.0
2016	512,294	103.5	15,736	102.4	3,103	85.0	202	531,335	103.3
2017	540,946	105.6	15,984	101.6	2,946	94.9	162	560,038	105.4
2018	546,336	101.0	15,890	99.4	2,780	94.4	184	565,190	100.9

Notes: 1. For motor vehicle classifications in Japan, see page 47. 2. "Other" includes buses, large special-purpose vehicles and small-sized three-wheeled trucks. 3. "Chg. (%)" means change from the previous year (with the previous year's result indexed at 100).

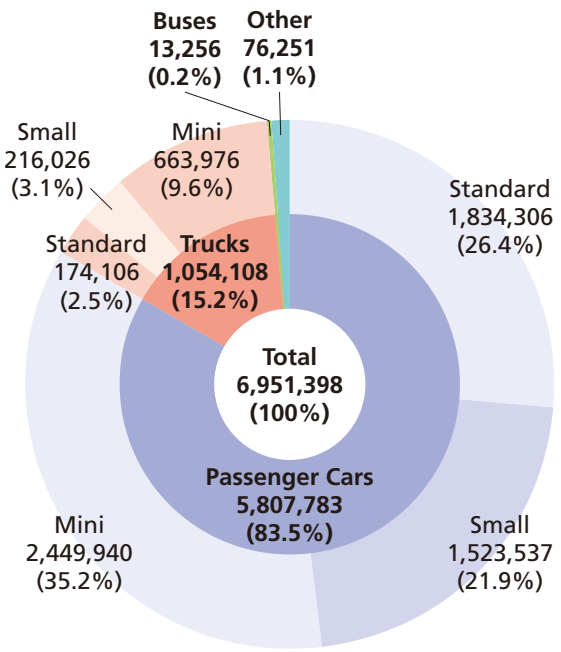
Source: Japan Automobile Importers Association

Used Vehicle Sales Total 6.95 Million Units

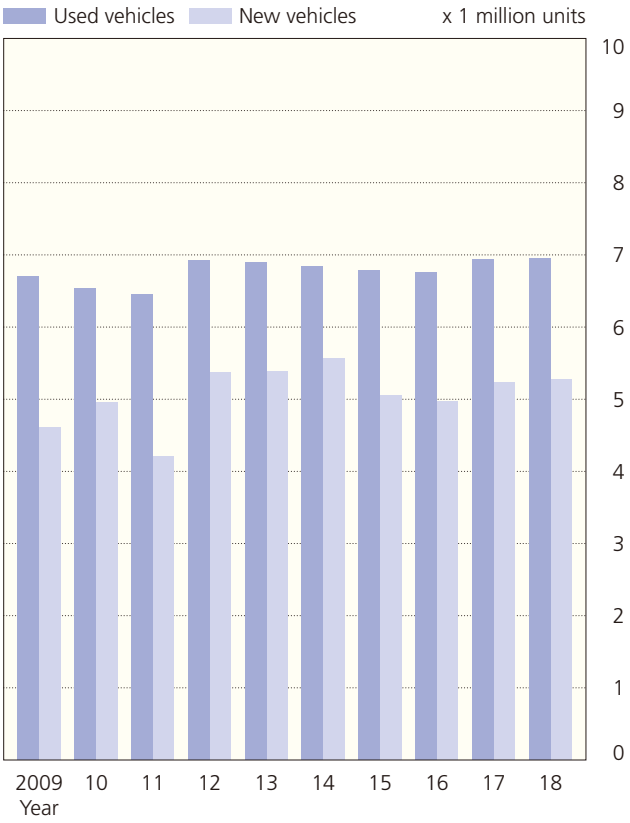
In 2018 sales of used motor vehicles were up 0.2% from the previous year to total 6.95 million units. Used passenger car sales totalled 5.81 million units, remaining at the same level as in 2017, with standard passenger cars climbing 1.7% to 1.83 million units and minicars increasing 1.5% to 2.45 million units, but small cars dropping 4.1% to 1.52 million units. Sales of used trucks and buses grew 1.2% and 1.5%, to 1.05 million units and 13,000 units respectively.

USED VEHICLE SALES BY TYPE IN 2018

In vehicle units



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
2009	1,619,370	1,855,071	1,864,874	5,339,315	94.2	194,180	266,395	787,957	1,248,532	89.9	15,293	94.4	95,452	91.3	6,698,592	93.3
2010	1,592,110	1,816,696	1,873,466	5,282,272	98.9	177,327	245,642	732,854	1,155,823	92.6	14,163	92.6	87,238	91.4	6,539,496	97.6
2011	1,542,614	1,733,519	1,906,523	5,182,656	98.1	168,470	233,556	769,613	1,171,639	101.4	13,849	97.8	82,007	94.0	6,450,151	98.6
2012	1,688,606	1,826,335	2,133,725	5,648,666	109.0	168,439	235,246	769,469	1,173,154	100.1	14,799	106.9	82,484	100.6	6,919,103	107.3
2013	1,666,732	1,740,725	2,255,560	5,663,017	100.3	167,793	223,734	746,631	1,138,158	97.0	12,830	86.7	81,016	98.2	6,895,021	99.7
2014	1,630,421	1,653,214	2,367,235	5,650,870	99.8	163,536	215,295	721,406	1,100,237	96.7	12,531	97.7	76,536	94.5	6,840,174	99.2
2015	1,668,429	1,602,719	2,354,077	5,625,225	99.5	162,130	211,480	700,589	1,074,199	97.6	13,173	105.1	74,217	97.0	6,786,814	99.2
2016	1,729,194	1,564,982	2,322,533	5,616,709	99.8	161,717	217,544	670,935	1,050,196	97.8	13,204	100.2	76,013	102.4	6,756,122	99.5
2017	1,802,956	1,588,747	2,414,874	5,806,577	103.4	166,629	218,601	656,703	1,041,933	99.2	13,066	99.0	75,942	99.9	6,937,518	102.7
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

Notes: 1. Passenger cars and trucks are classified under Japan's Road Vehicles Act in three categories, based primarily on engine capacity: "standard" (over 2,000cc), "small" (661cc-2,000cc), and "mini" (660cc and under); see page 47 for details. 2. Includes imported vehicles. 3. "Other" refers to emergency vehicles, special vehicles equipped with beds, refrigerated trucks, tank trucks, tractors, bulldozers, steamrollers, snowplows, snowmobiles, etc., that are assigned special registration numbers. 4. "Chg. (%)" means change from the previous year (with the previous year's result indexed at 100).

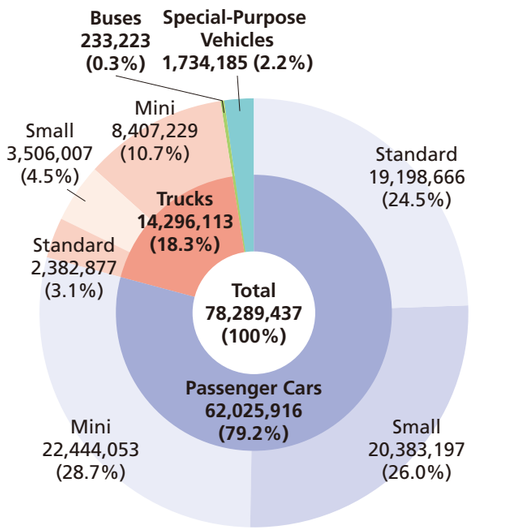
Sources: Japan Automobile Dealers Association; Japan Mini Vehicles Association

A Total of 78.29 Million Motor Vehicles in Use

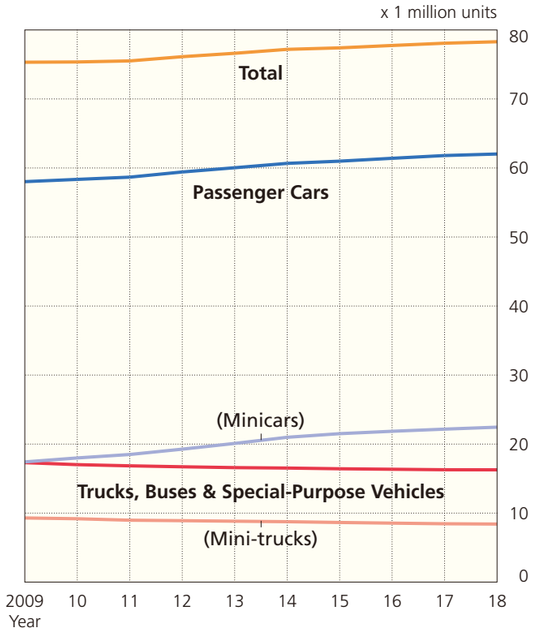
At the end of December 2018, motor vehicles in use in Japan (excluding motorcycles) totalled 78.3 million units, a 0.3% increase over the previous year. Passenger cars in use increased 0.4% to 62.0 million units, with standard and minicars growing 2.1% and 1.3% to 19.2 million and 22.4 million units respectively, but small cars dropping 2.2% to 20.4 million units. Meanwhile, trucks in use slipped 0.2% from 2017 to 14.3 million units, and buses in use dipped 0.1% to 233,000 units. At the end of March 2018, the average service life of motor vehicles in Japan was 13.24 years for passenger cars, 14.72 years for trucks, and 17.69 years for buses.

MOTOR VEHICLES IN USE BY TYPE AT END OF 2018

In vehicle units

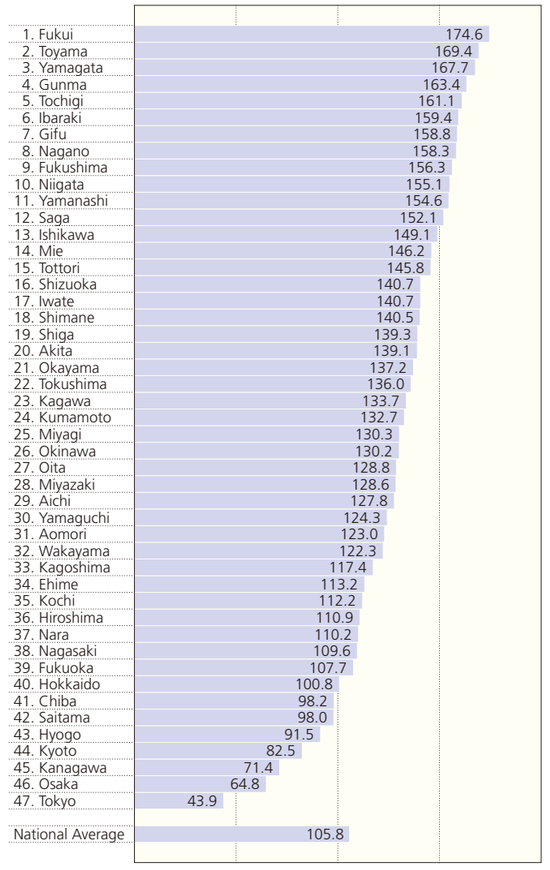


TRENDS IN MOTOR VEHICLES IN USE



PRIVATE PASSENGER CARS IN USE PER 100 HOUSEHOLDS BY PREFECTURE (at March 31, 2018)

In vehicle units



Source: Automobile Inspection & Registration Information Association

PASSENGER CARS IN USE BY YEAR OF FIRST REGISTRATION

At March 31, 2018

Year of First Registration	Vehicles in Use	% of "Vehicles in Use" Total
April 2017-March 2018	2,859,555	7.23
April 2016-March 2017	2,846,101	7.20
April 2015-March 2016	2,568,804	6.50
April 2014-March 2015	2,502,061	6.33
April 2013-March 2014	2,809,721	7.11
April 2012-March 2013	2,564,598	6.49
April 2011-March 2012	2,395,140	6.06
April 2010-March 2011	2,227,476	5.63
April 2009-March 2010	2,396,515	6.06
April 2008-March 2009	1,868,274	4.73
April 2007-March 2008	2,082,340	5.27
April 2006-March 2007	1,900,513	4.81
April 2005-March 2006	1,947,112	4.93
April 2004-March 2005	1,593,926	4.03
-March 2004	6,971,646	17.64
Total "Vehicles in Use"	39,533,782	100.00

AVERAGE AGE BY TYPE

In years

Year	Passenger Cars	Trucks	Buses
2009	7.48	9.16	10.26
2010	7.56	9.62	10.50
2011	7.74	10.04	10.78
2012	7.95	10.43	11.12
2013	8.07	10.73	11.38
2014	8.13	10.93	11.56
2015	8.29	11.09	11.76
2016	8.44	11.23	11.87
2017	8.53	11.32	11.84
2018	8.60	11.41	11.81

AVERAGE SERVICE LIFE BY TYPE

In years

Year	Passenger Cars	Trucks	Buses
2009	11.68	13.50	15.00
2010	12.70	12.72	16.59
2011	12.43	13.04	17.37
2012	12.16	12.81	16.82
2013	12.58	13.24	17.91
2014	12.64	13.31	17.63
2015	12.38	13.72	16.95
2016	12.76	13.89	16.83
2017	12.91	14.37	17.39
2018	13.24	14.72	17.69

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
2009	16,688,645	23,919,019	17,412,189	58,019,853	100.3	2,319,612	3,952,534	9,288,679	15,560,825	97.9	108,760	119,637	228,397	99.0	1,515,411	98.6	75,324,486	99.7	152,381	3,127	2009
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

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).

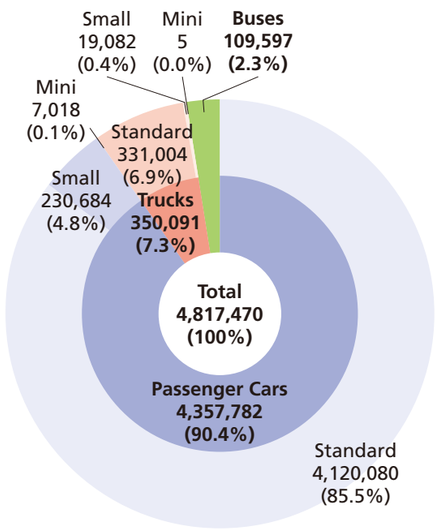
Source: Ministry of Land, Infrastructure, Transport and Tourism

Motor Vehicle Exports Total 4.82 Million Units

Exports of motor vehicles in 2018 totalled 4.82 million units, with passenger car exports rising 3.3% from the previous year to 4.36 million units while truck exports were tallied at 350,000 units and bus exports at 110,000 units.
(Year-on-year increase/decrease rates for truck, bus and total exports in 2017 and 2018 are not available owing to incomplete data; see note 4. below.)

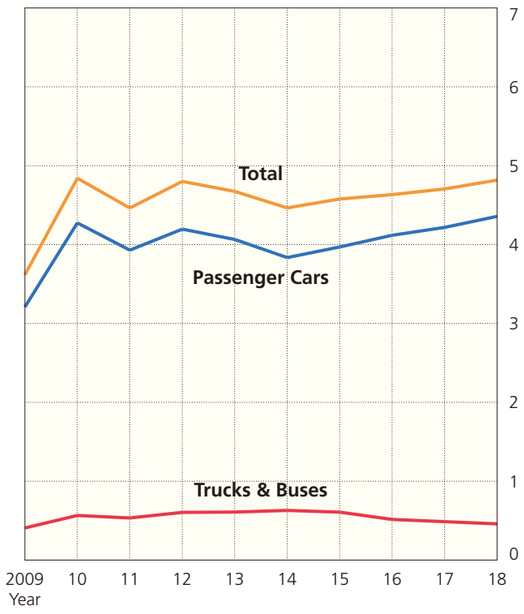
MOTOR VEHICLE EXPORTS BY TYPE IN 2018

In vehicle units



TRENDS IN MOTOR VEHICLE EXPORTS

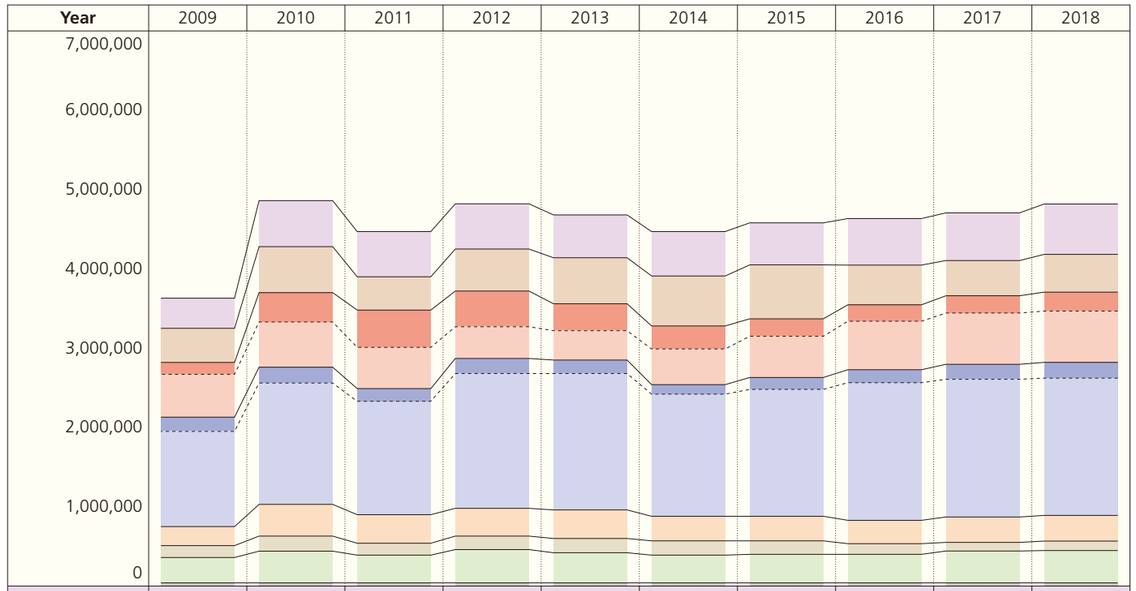
x 1 million units



MOTOR VEHICLE EXPORT TRENDS BY DESTINATION

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

In vehicle units



Year	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Asia	378,840	576,440	572,417	572,976	540,154	560,304	529,291	586,954	601,204	635,045
Middle East	428,042	583,684	419,715	525,954	584,062	625,708	684,886	500,325	443,963	476,157
Europe	685,026	936,496	995,313	848,688	709,139	744,138	737,518	818,931	864,518	885,705
(EU)	542,215	568,508	521,804	401,286	371,305	452,322	524,770	611,559	646,679	646,943
North America	1,379,150	1,727,305	1,585,327	1,886,386	1,887,155	1,662,160	1,749,208	1,898,913	1,925,356	1,929,781
(U.S.A.)	1,202,732	1,531,026	1,426,833	1,698,152	1,719,793	1,537,676	1,604,446	1,735,480	1,736,765	1,731,025
Latin America	244,196	396,499	358,375	346,860	362,023	306,117	310,001	294,378	320,236	323,591
Africa	145,131	188,644	148,599	168,306	179,352	183,860	168,234	134,497	108,845	119,549
Oceania	347,394	425,206	379,747	448,969	407,294	375,672	390,891	393,457	434,458	438,362
Other	8,389	7,186	4,920	5,452	5,454	7,665	8,049	6,578	7,268	9,280
Total	3,616,168	4,841,460	4,464,413	4,803,591	4,674,633	4,465,624	4,578,078	4,634,033	4,705,848	4,817,470
Chg. (%)	53.8	133.9	92.2	107.6	97.3	95.5	102.5	101.2	—	—

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

MOTOR VEHICLE EXPORTS

In vehicle units

Year	Passenger Cars					Trucks			Buses		Total		Year
	Standard	Small	Mini	Subtotal	Chg. (%)	Standard	Small	Mini	Subtotal	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
2009	2,403,359	804,980	300	3,208,639	54.2	267,060	48,447	0	315,507	47.9	92,022	60.0	3,616,168	53.8	2009
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

Notes: 1. Figures represent ex-factory export shipments of motor vehicles manufactured in Japan, which are classified in the above categories as per Japanese law, including the Road Vehicles cost of compositional components per vehicle and have been treated as components since 1988. 4. Since December 2017, export figures from one JAMA member manufacturer have not been Act. 2. Vehicle type classification in this table differs somewhat from that used in Ministry of Finance export data. 3. KD sets have been excluded since 1979; they represent less than 60% of the available. 5. "Chg. (%)" means change from the previous year (with the previous year's result indexed at 100).

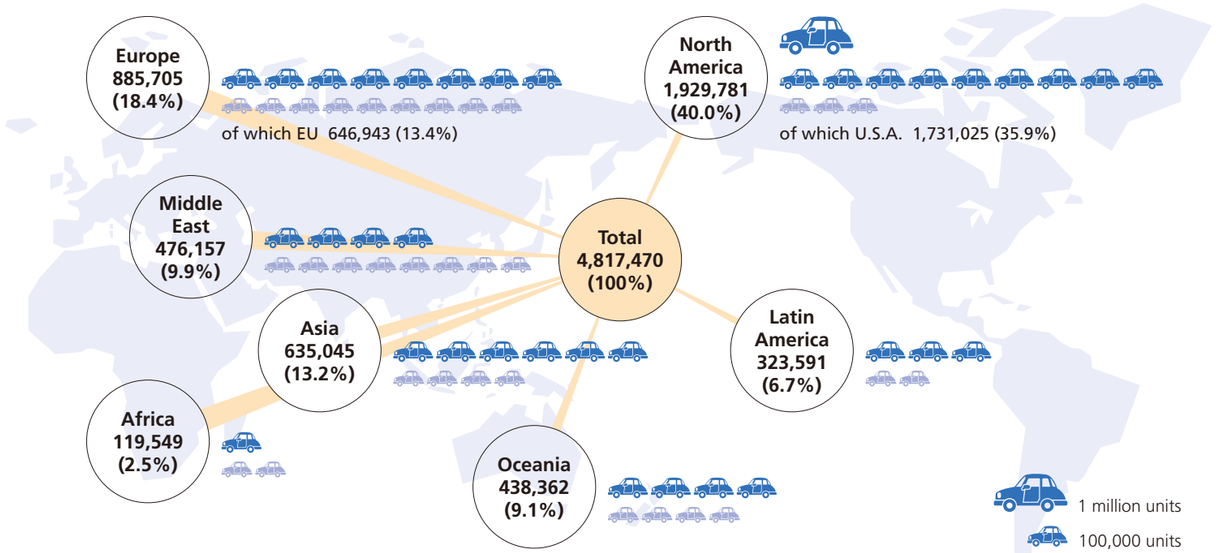
Source: Japan Automobile Manufacturers Association

A Rise in Worldwide Motor Vehicle Exports

Motor vehicle exports to all destinations increased in 2018 from the previous year, climbing to North America (1.93 million units), Europe (886,000 units), Asia (635,000 units), the Middle East (476,000), Oceania (438,000 units), Latin America (324,000 units), and Africa (120,000 units).

MOTOR VEHICLE EXPORTS BY DESTINATION IN 2018

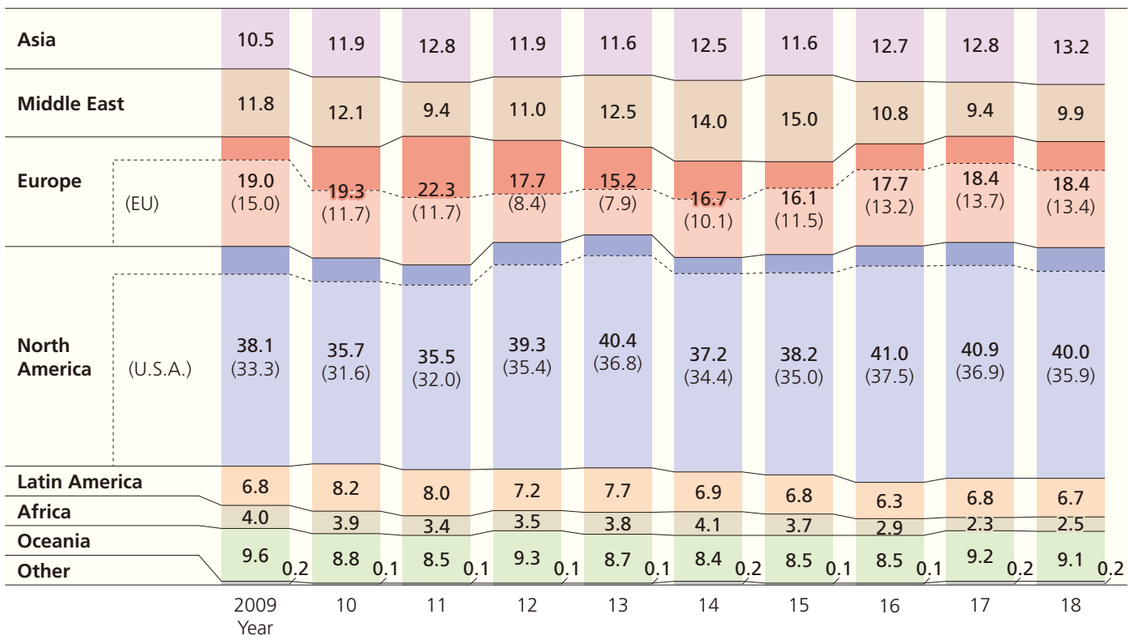
In vehicle units



Note: The "Total" figure includes 9,280 units (0.2%) shipped to other destinations.

MOTOR VEHICLE EXPORT TRENDS BY DESTINATION

In %



MOTOR VEHICLE EXPORTS BY DESTINATION & BY VEHICLE TYPE IN 2018

In vehicle units

Destination		Passenger Cars				Trucks				Buses	Total
		Standard	Small	Mini	Subtotal	Standard	Small	Mini	Subtotal		
Asia	South Korea	25,035	1,206	0	26,241	565	0	0	565	1	26,807
	China	209,614	1,942	0	211,556	3	0	0	3	219	211,778
	Taiwan	83,049	6,000	0	89,049	11,274	0	0	11,274	704	101,027
	Hong Kong	10,257	4,131	126	14,514	3,818	2,368	0	6,186	798	21,498
	Thailand	1,446	3	0	1,449	3,569	0	0	3,569	10,164	15,182
	Singapore	20,317	3,447	0	23,764	6,830	0	0	6,830	309	30,903
	Malaysia	29,969	7,441	0	37,410	12,777	1,272	0	14,049	2,124	53,583
	Philippines	11,559	389	0	11,948	9,776	0	0	9,776	22,965	44,689
	Indonesia	15,113	54	1	15,168	23,620	0	0	23,620	5,065	43,853
	Pakistan	241	5,465	0	5,706	8,735	0	4	8,739	987	15,432
	Other	45,108	807	3,368	49,283	12,368	5,955	0	18,323	2,687	70,293
	Subtotal	451,708	30,885	3,495	486,088	93,335	9,595	4	102,934	46,023	635,045
Middle East	Bahrain	11,056	51	0	11,107	1,262	0	0	1,262	966	13,335
	Saudi Arabia	89,858	0	0	89,858	13,754	0	0	13,754	922	104,534
	Kuwait	38,626	148	0	38,774	1,862	0	0	1,862	1,715	42,351
	Oman	32,814	451	0	33,265	9,876	0	0	9,876	2,962	46,103
	Israel	41,246	5,590	0	46,836	922	0	0	922	0	47,758
	United Arab Emirates	123,601	1,201	0	124,802	11,958	0	0	11,958	4,592	141,352
	Qatar	18,475	232	0	18,707	1,714	0	0	1,714	1,371	21,792
	Other	45,176	833	0	46,009	11,899	0	0	11,899	1,024	58,932
	Subtotal	400,852	8,506	0	409,358	53,247	0	0	53,247	13,552	476,157
Europe (EU)	Sweden	22,218	641	0	22,859	2	0	0	2	0	22,861
	Denmark	7,586	3,269	0	10,855	0	0	0	0	0	10,855
	UK	111,280	46,857	0	158,137	0	0	0	0	0	158,137
	Netherlands	16,641	5,308	0	21,949	0	0	0	0	0	21,949
	Belgium	17,004	2,593	0	19,597	0	0	0	0	1	19,598
	France	39,865	15,214	3,169	58,248	0	0	0	0	0	58,248
	Germany	114,317	15,557	0	129,874	3	0	0	3	0	129,877
	Spain	61,171	2,303	0	63,474	0	0	0	0	0	63,474
	Italy	32,173	15,274	0	47,447	8,580	0	0	8,580	0	56,027
	Finland	8,243	721	0	8,964	6	0	0	6	0	8,970
	Poland	22,250	1,757	0	24,007	1	0	0	1	0	24,008
	Austria	14,813	3,045	0	17,858	66	0	0	66	46	17,970
	Greece	947	2,793	0	3,740	0	0	0	0	0	3,740
	Other	42,218	6,694	0	48,912	2,317	0	0	2,317	0	51,229
	Subtotal	510,726	122,026	3,169	635,921	10,975	0	0	10,975	47	646,943
	Norway	15,934	750	224	16,908	350	0	0	350	0	17,258
	Switzerland	14,891	2,724	130	17,745	0	0	0	0	0	17,745
	Russia	166,357	408	0	166,765	4,840	0	0	4,840	0	171,605
	Turkey	9,599	741	0	10,340	2,443	0	0	2,443	0	12,783
	Ukraine	15,312	73	0	15,385	673	0	0	673	0	16,058
	Other	2,931	382	0	3,313	0	0	0	0	0	3,313
	Subtotal	735,750	127,104	3,523	866,377	19,281	0	0	19,281	47	885,705
North America	Canada	192,836	2,232	0	195,068	3,688	0	0	3,688	0	198,756
	U.S.A.	1,692,898	4,255	0	1,697,153	33,872	0	0	33,872	0	1,731,025
	Subtotal	1,885,734	6,487	0	1,892,221	37,560	0	0	37,560	0	1,929,781
Latin America	Mexico	76,449	17,646	0	94,095	17,359	0	0	17,359	9,042	120,496
	Puerto Rico	20,263	69	0	20,332	51	0	0	51	0	20,383
	Colombia	17,199	645	0	17,844	9,745	0	0	9,745	960	28,549
	Ecuador	8,225	149	0	8,374	2,263	0	0	2,263	1,103	11,740
	Peru	15,091	485	0	15,576	2,761	0	0	2,761	1,052	19,389
	Chile	47,174	6,263	0	53,437	2,552	0	0	2,552	107	56,096
	Brazil	13,716	7	0	13,723	0	0	0	0	0	13,723
	Other	30,662	5,432	0	36,094	10,958	205	0	11,163	5,958	53,215
	Subtotal	228,779	30,696	0	259,475	45,689	205	0	45,894	18,222	323,591
Africa	Algeria	1,046	0	0	1,046	0	0	0	0	0	1,046
	Egypt	7,382	0	0	7,382	9,923	7,452	0	17,375	2,783	27,540
	Nigeria	386	0	0	386	281	0	0	281	300	967
	Kenya	323	4	0	327	4,299	0	0	4,299	8	4,634
	South Africa	25,495	1,304	0	26,799	8,927	1,216	0	10,143	15,352	52,294
	Other	15,254	615	0	15,869	11,274	32	0	11,306	5,893	33,068
	Subtotal	49,886	1,923	0	51,809	34,704	8,700	0	43,404	24,336	119,549
Oceania	Australia	322,373	16,937	0	339,310	35,369	360	0	35,729	2,957	377,996
	New Zealand	37,554	7,288	0	44,842	4,489	184	1	4,674	432	49,948
	Other	5,089	708	0	5,797	2,632	38	0	2,670	1,951	10,418
	Subtotal	365,016	24,933	0	389,949	42,490	582	1	43,073	5,340	438,362
Other		2,355	150	0	2,505	4,698	0	0	4,698	2,077	9,280
Grand Totals		4,120,080	230,684	7,018	4,357,782	331,004	19,082	5	350,091	109,597	4,817,470

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

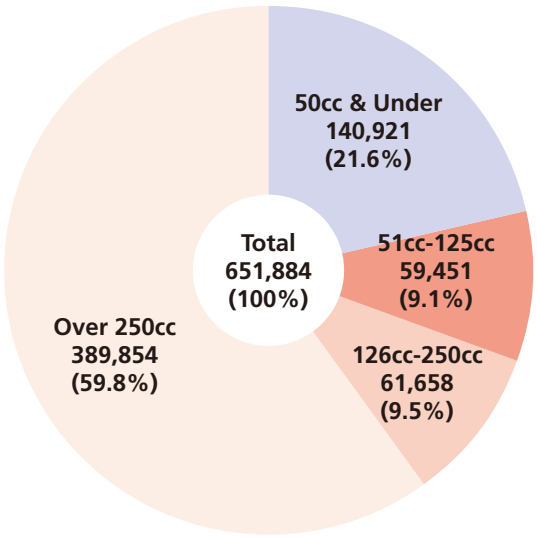
Source: Japan Automobile Manufacturers Association

Motorcycle Production Totals 652,000 Units

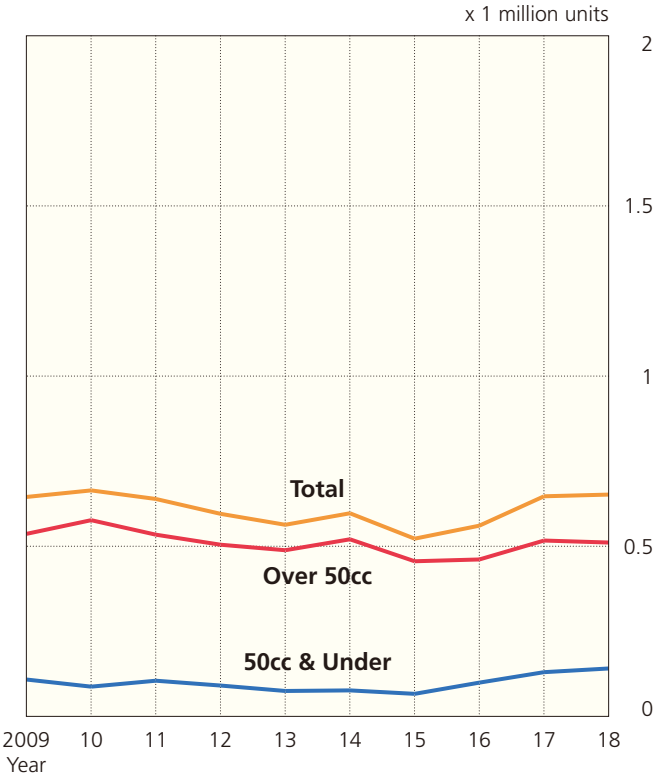
Overall domestic motorcycle production in 2018 rose 0.8% over the previous year to 652,000 units. Class 1 motor-driven cycles (50cc and under) increased 8.3% to 141,000 units and Class 2 motor-driven cycles (51cc to 125cc) surged 76.6% to 59,000 units, but mini-sized motorcycles (126cc to 250cc) decreased 21.9% to 62,000 units and small-sized motorcycles (over 250cc) dropped 3.5% to 390,000 units. The combined total for larger motorcycles (all those over 50cc) slipped 1.1% to 511,000 units.

MOTORCYCLE PRODUCTION BY ENGINE CAPACITY IN 2018

In vehicle units



TRENDS IN MOTORCYCLE PRODUCTION



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
2009	108,417	57,424	125,384	353,676	536,484	644,901	52.6
2010	87,513	80,630	108,950	387,082	576,662	664,175	103.0
2011	104,936	64,507	104,636	365,108	534,251	639,187	96.2
2012	90,886	39,569	91,925	373,093	504,587	595,473	93.2
2013	74,940	27,670	88,108	372,591	488,369	563,309	94.6
2014	76,569	31,529	93,536	395,424	520,489	597,058	106.0
2015	66,438	30,886	76,945	348,125	455,956	522,394	87.5
2016	99,319	31,465	73,194	356,558	461,217	560,536	107.3
2017	130,149	33,665	78,993	404,176	516,834	646,983	115.4
2018	140,921	59,451	61,658	389,854	510,963	651,884	100.8

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).

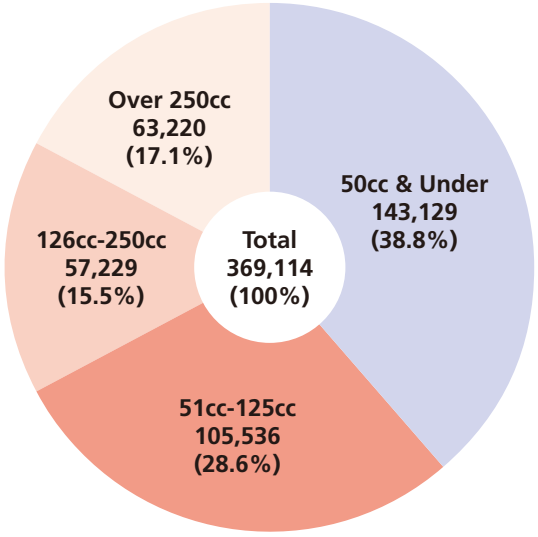
Source: Japan Automobile Manufacturers Association

Motorcycle Sales Total 369,000 Units

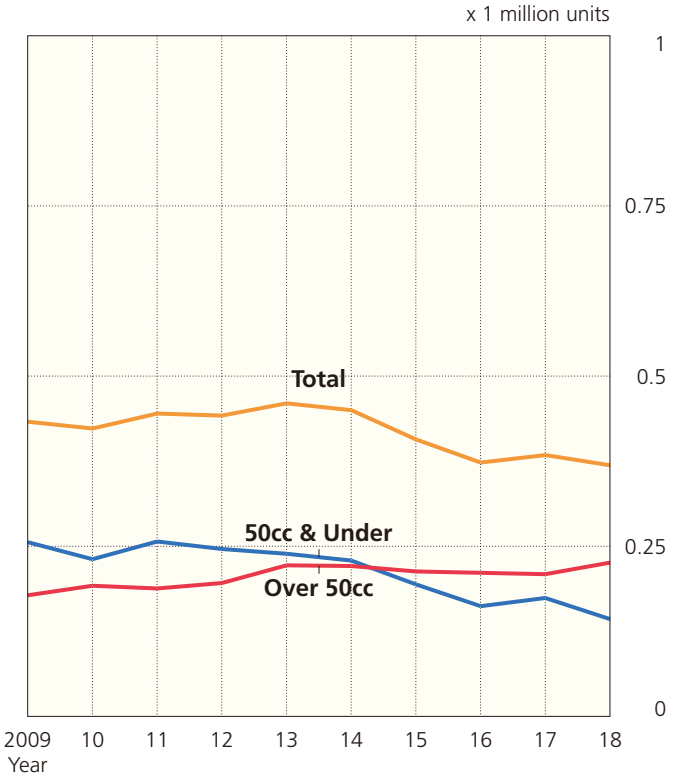
Domestic motorcycle sales in 2018 totalled 369,000 units, down 3.8% from the previous year. By engine capacity, whereas sales of Class 1 motor-driven cycles (50cc and under) decreased 17.9% to 143,000 units and small-sized motorcycles (over 250cc) shrank 1.2% to 63,000 units, sales of Class 2 motor-driven cycles (51cc to 125cc) and mini-sized motorcycles (126cc to 250cc) increased 18.9% to 106,000 units and 1.1% to 57,000 units, respectively. Overall sales of motorcycles with engine capacity over 50cc totalled 226,000 units, an increase of 7.9% over 2017.

MOTORCYCLE SALES BY ENGINE CAPACITY IN 2018

In vehicle units



TRENDS IN MOTORCYCLE SALES



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
2009	255,561	65,888	48,127	63,763	177,778	433,339	76.5
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

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).

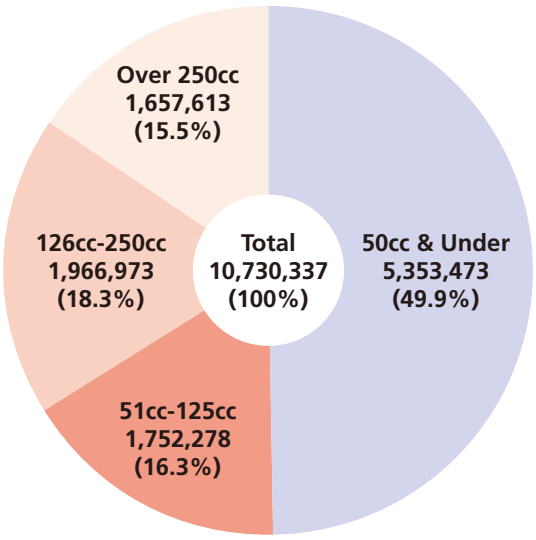
Source: Japan Automobile Manufacturers Association

10.73 Million Motorcycles in Use

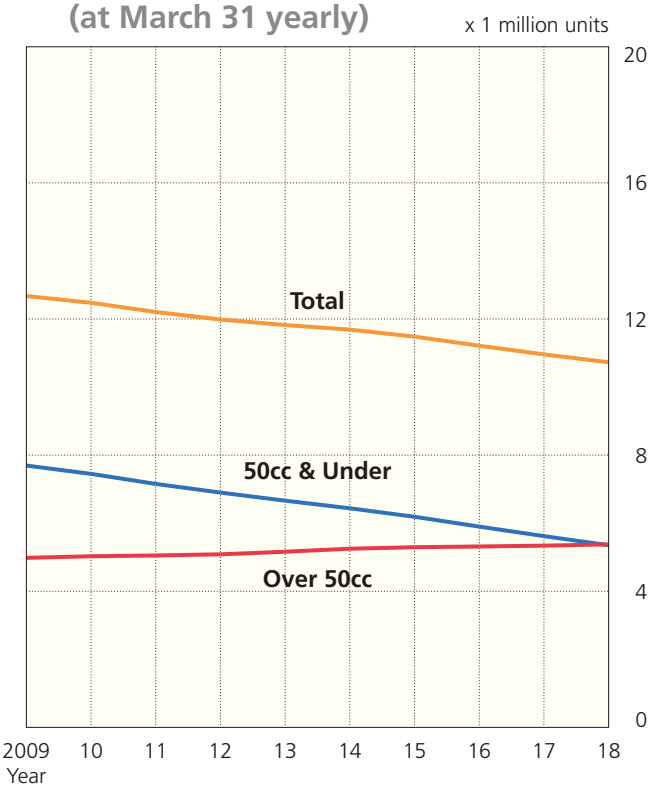
At March 31, 2018, motorcycles in use in Japan totalled 10.73 million units, down 2.1% from the previous year. By engine capacity, Class 1 motor-driven cycles, accounting for 49.9% of all motorcycles in use, dropped 4.7% to 5.35 million units in 2018, whereas small-sized motorcycles, Class 2 motor-driven cycles, and mini-sized motorcycles in use rose 1.0%, 0.8%, and 0.3%, to 1.66 million, 1.75 million, and 1.97 million units respectively. Thus, motorcycles over 50cc in use increased 0.7%, to a total of 5.38 million units.

MOTORCYCLES IN USE BY ENGINE CAPACITY (at March 31, 2018)

In vehicle units



TRENDS IN MOTORCYCLES IN USE (at March 31 yearly)



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
2009	7,694,009	1,479,588	1,996,311	1,505,304	4,981,203	12,675,212	99.1
2010	7,448,862	1,511,440	1,992,939	1,524,176	5,028,555	12,477,417	98.4
2011	7,154,455	1,540,667	1,975,623	1,535,181	5,051,471	12,205,926	97.8
2012	6,899,459	1,582,925	1,959,845	1,542,856	5,085,626	11,985,085	98.2
2013	6,661,807	1,626,094	1,969,187	1,566,341	5,161,622	11,823,429	98.7
2014	6,438,002	1,674,884	1,980,411	1,595,335	5,250,630	11,688,632	98.9
2015	6,188,710	1,704,083	1,978,462	1,611,089	5,293,634	11,482,344	98.2
2016	5,899,276	1,717,092	1,970,471	1,628,461	5,316,024	11,215,300	97.7
2017	5,615,360	1,737,911	1,961,109	1,641,580	5,340,600	10,955,960	97.7
2018	5,353,473	1,752,278	1,966,973	1,657,613	5,376,864	10,730,337	97.9

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).

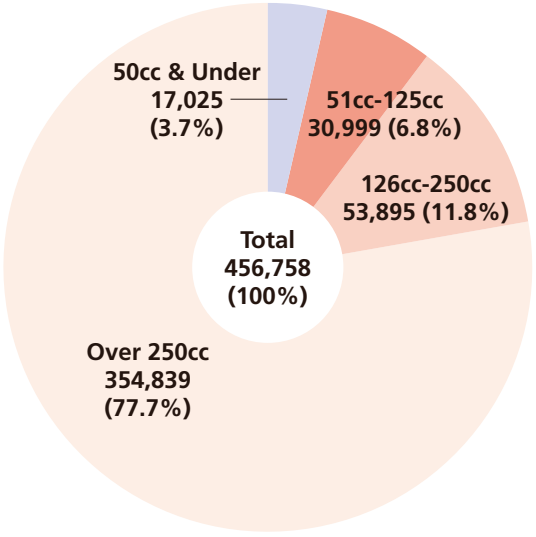
Sources: Ministry of Land, Infrastructure, Transport and Tourism; since 2006 (only for the 125cc-and-under categories), *Ministry of Internal Affairs and Communications*

Motorcycle Exports Total 457,000 Units

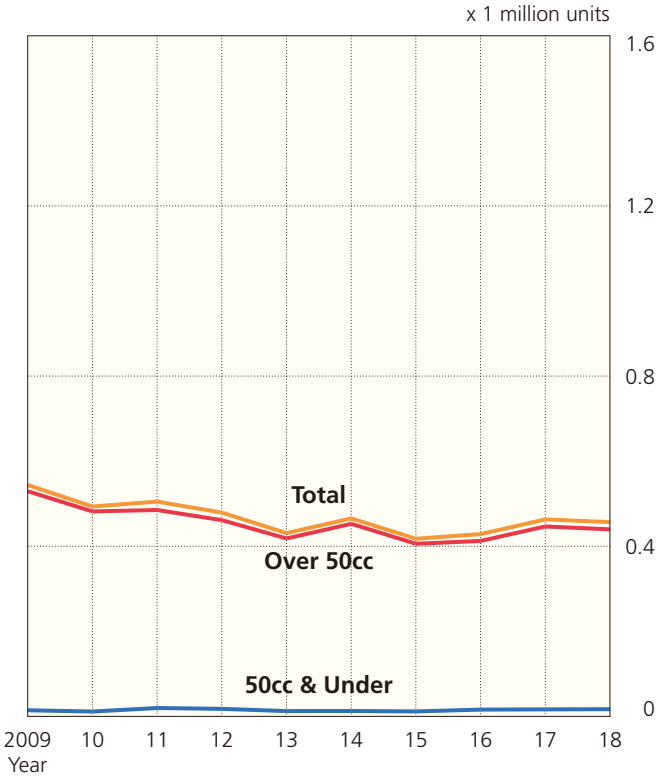
Motorcycle exports in 2018 decreased 1.4% from the previous year to 457,000 units. By engine capacity, exports of Class 1 motor-driven cycles rose 2.8% to 17,000 units and exports of Class 2 motor-driven cycles climbed 22.1% to 31,000 units, whereas mini-sized motorcycle and small-sized motorcycle exports fell 8.0% and 2.1%, to 54,000 units and 355,000 units respectively.

MOTORCYCLE EXPORTS BY ENGINE CAPACITY IN 2018

In vehicle units



TRENDS IN MOTORCYCLE EXPORTS



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
2009	14,493	44,708	101,298	383,380	529,386	543,879	54.3
2010	11,522	48,976	85,506	347,460	481,942	493,464	90.7
2011	19,745	45,853	83,594	355,793	485,240	504,985	102.3
2012	17,794	35,579	69,963	355,827	461,369	479,163	94.9
2013	12,560	27,676	64,566	326,095	418,337	430,897	89.9
2014	12,778	29,771	63,891	359,144	452,806	465,584	108.0
2015	11,761	30,823	59,851	315,214	405,888	417,649	89.7
2016	16,031	30,181	59,805	322,602	412,588	428,619	102.6
2017	16,559	25,395	58,611	362,558	446,564	463,123	108.1
2018	17,025	30,999	53,895	354,839	439,733	456,758	98.6

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).

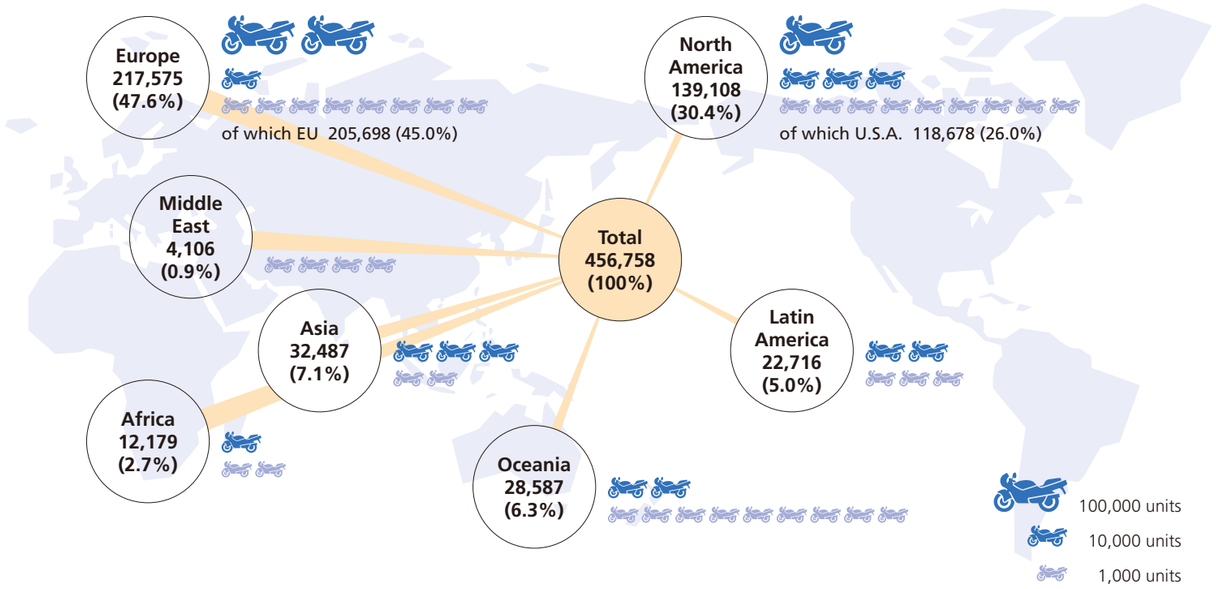
Source: Japan Automobile Manufacturers Association

An Increase in Motorcycle Exports to North America

Compared to the previous year, motorcycle exports in 2018 increased to North America (139,000 units), but declined to Europe (218,000 units), Asia (32,000 units), Oceania (29,000 units), Latin America (23,000 units), Africa (12,000 units), and the Middle East (4,000 units).

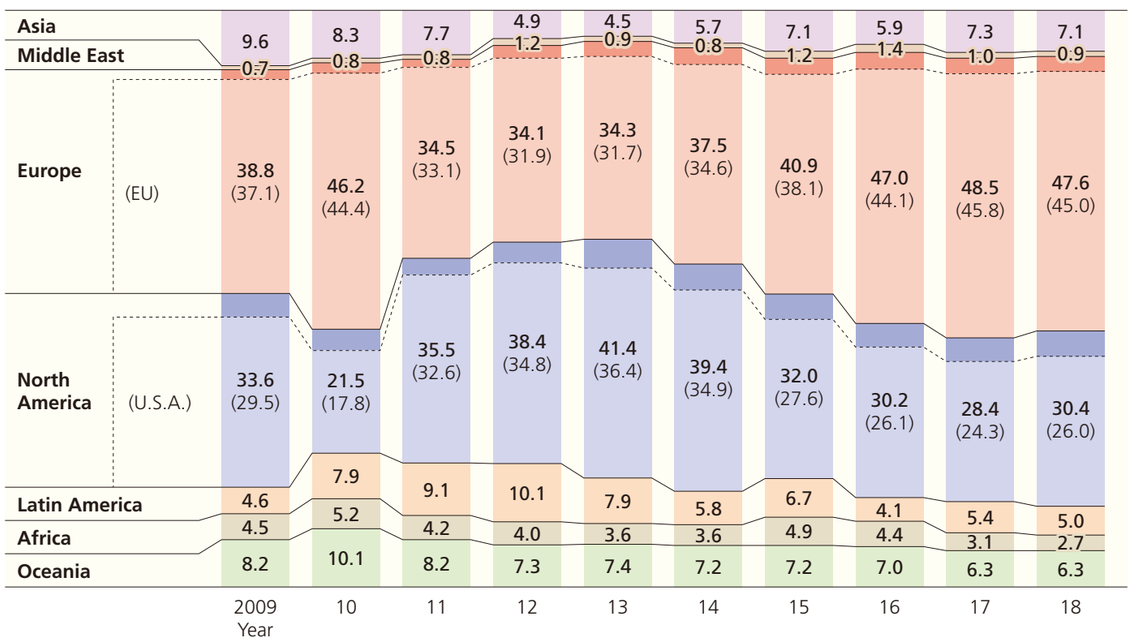
MOTORCYCLE EXPORTS BY DESTINATION IN 2018

In vehicle units



MOTORCYCLE EXPORT TRENDS BY DESTINATION

In %



MOTORCYCLE EXPORTS BY DESTINATION & BY ENGINE CAPACITY IN 2018

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	14	7	4,560	4,581	4,581
	China	0	0	0	2,315	2,315	2,315
	Taiwan	0	1,340	0	3,122	4,462	4,462
	Hong Kong	126	0	59	1,763	1,822	1,948
	Thailand	0	3	678	6,461	7,142	7,142
	Singapore	0	180	230	1,389	1,799	1,799
	Malaysia	0	0	0	2,524	2,524	2,524
	Philippines	54	106	66	1,905	2,077	2,131
	Indonesia	9	291	3,560	415	4,266	4,275
	Other	16	5	122	1,167	1,294	1,310
	Subtotal	205	1,939	4,722	25,621	32,282	32,487
Middle East	Saudi Arabia	0	28	22	507	557	557
	Israel	54	102	165	1,669	1,936	1,990
	United Arab Emirates	33	66	68	537	671	704
	Other	3	21	78	753	852	855
	Subtotal	90	217	333	3,466	4,016	4,106
Europe	Sweden	0	2	170	1,160	1,332	1,332
	Denmark	0	12	42	744	798	798
	UK	0	0	508	9,496	10,004	10,004
	Netherlands	0	843	1,493	37,105	39,441	39,441
	Belgium	0	0	61	1,818	1,879	1,879
	France	2,199	2,728	2,129	43,378	48,235	50,434
	Germany	516	1,362	1,221	30,226	32,809	33,325
EU	Portugal	0	0	35	2,386	2,421	2,421
EU	Spain	213	295	291	16,224	16,810	17,023
EU	Italy	243	440	2,303	36,156	38,899	39,142
EU	Poland	0	0	36	1,032	1,068	1,068
EU	Austria	0	10	75	2,086	2,171	2,171
EU	Hungary	0	9	5	1,164	1,178	1,178
EU	Greece	30	42	12	1,588	1,642	1,672
EU	Slovenia	36	52	96	708	856	892
EU	Czech Republic	0	0	10	1,410	1,420	1,420
EU	Other	3	23	212	1,260	1,495	1,498
	Subtotal	3,240	5,818	8,699	187,941	202,458	205,698
	Norway	0	2	77	708	787	787
	Switzerland	63	110	300	6,950	7,360	7,423
	Turkey	0	12	2	2,369	2,383	2,383
	Russia	39	50	32	871	953	992
	Other	0	0	2	290	292	292
	Subtotal	3,342	5,992	9,112	199,129	214,233	217,575
North America	Canada	1,149	1,824	3,897	13,560	19,281	20,430
	U.S.A.	9,630	9,952	20,620	78,476	109,048	118,678
	Subtotal	10,779	11,776	24,517	92,036	128,329	139,108
Latin America	Mexico	108	14	167	2,015	2,196	2,304
	Guatemala	3	39	479	223	741	744
	Panama	0	2	151	294	447	447
	Colombia	0	121	2,013	2,162	4,296	4,296
	Peru	6	38	20	135	193	199
	Chile	60	132	537	1,366	2,035	2,095
	Brazil	0	0	219	8,115	8,334	8,334
	Argentina	0	61	194	2,077	2,332	2,332
	Other	62	93	720	1,090	1,903	1,965
	Subtotal	239	500	4,500	17,477	22,477	22,716
Africa	Guinea	0	0	210	0	210	210
	Togo	0	880	720	0	1,600	1,600
	Mali	0	1,080	424	0	1,504	1,504
	Niger	0	580	350	0	930	930
	Dem Rep Congo	0	1,324	50	0	1,374	1,374
	Ethiopia	0	0	380	275	655	655
	Kenya	0	118	115	0	233	233
	Uganda	0	616	24	0	640	640
	South Africa	78	346	642	913	1,901	1,979
	Other	3	943	963	1,145	3,051	3,054
	Subtotal	81	5,887	3,878	2,333	12,098	12,179
Oceania	Australia	1,794	3,412	4,789	12,987	21,188	22,982
	New Zealand	483	1,216	1,848	1,615	4,679	5,162
	Other	12	60	196	175	431	443
	Subtotal	2,289	4,688	6,833	14,777	26,298	28,587
Grand Totals		17,025	30,999	53,895	354,839	439,733	456,758

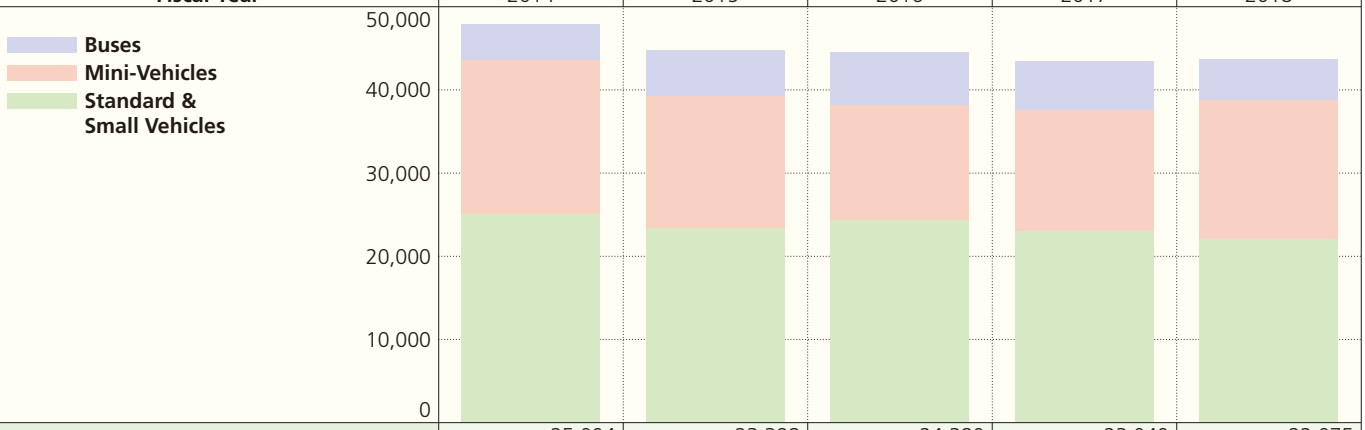
Source: Japan Automobile Manufacturers Association

Assisted-Mobility Vehicle Sales Total 44,000 Units

In 2018 sales of assisted-mobility vehicles were up 0.5% from the previous year to total 44,000 units. Assisted-mobility vehicles provide a comfortable and convenient means of displacement for people with otherwise limited mobility, such as elderly persons and the physically disabled. They also play an essential role in the provision of public transportation services for all users. Japan's automakers have been working to enhance the convenience of assisted-mobility vehicles and thereby provide their users with optimal-quality mobility.

TRENDS IN ASSISTED-MOBILITY VEHICLE SALES

In vehicle units



Fiscal Year		2014	2015	2016	2017	2018
Standard & Small Vehicles		25,004	23,398	24,380	23,040	22,075
	Chg. (%)	102.6	93.6	104.2	94.5	95.8
Wheelchair-accessible vehicles		14,013	13,525	14,493	14,455	13,519
Vehicles with elevator seats		10,065	7,454	6,217	5,451	5,991
Vehicles with revolving seats		—	1,552	2,838	2,245	1,783
Vehicles with drive-assist systems		552	427	370	264	129
Wheelchair vans (multiple capacity)		374	440	462	625	653
Mini-Vehicles		18,560	15,837	13,796	14,446	16,615
	Chg. (%)	120.0	85.3	87.1	104.7	115.0
Wheelchair-accessible vehicles		14,487	12,705	11,112	11,444	13,933
Vehicles with elevator seats		4,055	2,848	2,491	2,748	2,455
Vehicles with revolving seats		—	273	193	254	227
Vehicles with drive-assist systems		18	11	0	0	0
Buses		4,305	5,510	6,308	6,008	5,022
	Chg. (%)	98.9	128.0	114.5	95.2	83.6
Total		47,869	44,745	44,484	43,494	43,712
	Chg. (%)	108.3	93.5	99.4	97.8	100.5

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

TYPES OF ASSISTED-MOBILITY VEHICLES

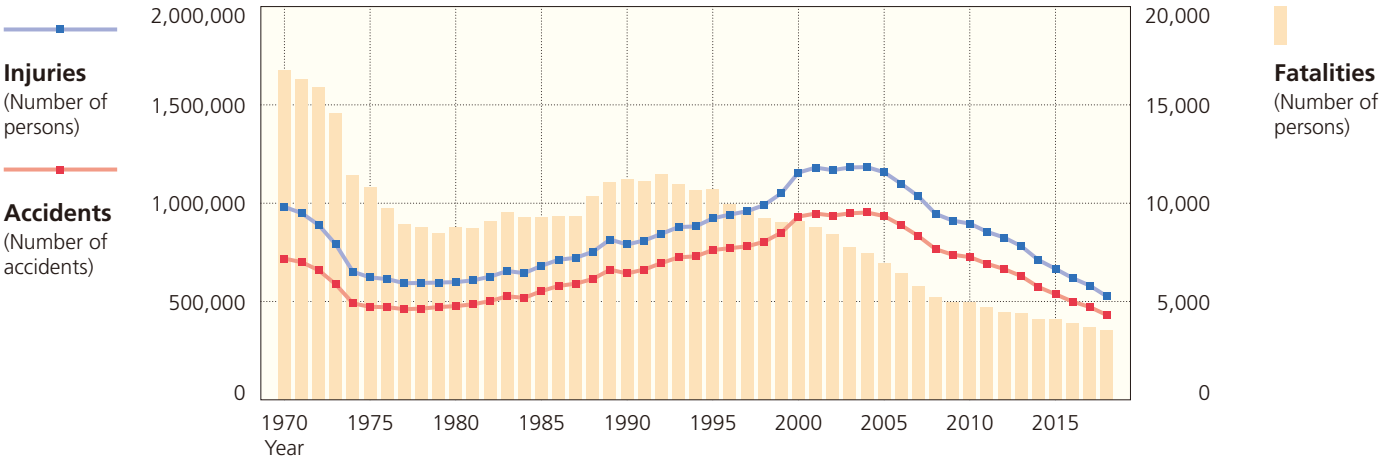
Vehicle Type	Vehicle Feature	Description	
Nursing care	Wheelchair-accessible (with ramp or lift)	Equipped with a ramp or an electrically-operated lift that allows boarding/deboarding while remaining seated in a wheelchair. Some types of ramps are operated electrically.	
	Elevator seat	Equipped with a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

Promoting Greater Road Safety

Road safety involves three factors—road users, road infrastructure, and vehicles. Accordingly, those three factors are the focus of JAMA's and its member manufacturers' road safety activities (for the latter's vehicle-related measures for increased active and passive safety, see page 27). JAMA's activities promoting greater road safety target, through various channels, road users, and JAMA also regularly submits to Japan's relevant authorities recommendations on road infrastructure-related measures for increased safety and convenience in road use.

In 2018 road fatalities (defined here as deaths occurring within 24 hours after accident) in Japan dropped to 3,532, the lowest level recorded since the start of road fatality data compilation in 1948 by the National Police Agency. Road accidents and road injuries also declined, for the fourteenth consecutive year, to 430,601 and 525,846 respectively. Seatbelt use is a major contributing factor to reduced fatalities and reduced injuries in road traffic accidents. The June 2008 revision to the Road Traffic Act requires all automobile occupants, including rear-seat occupants, to use seatbelts. Although the rate of use of rear seatbelts in 2018 stood at 38.0% on regular roads and at 74.2% on expressways, those rates remain low compared to the rate of use of front seatbelts, which approaches 100%. Further measures are needed to encourage rear-seat occupants to buckle up.

ROAD ACCIDENTS/INJURIES/FATALITIES

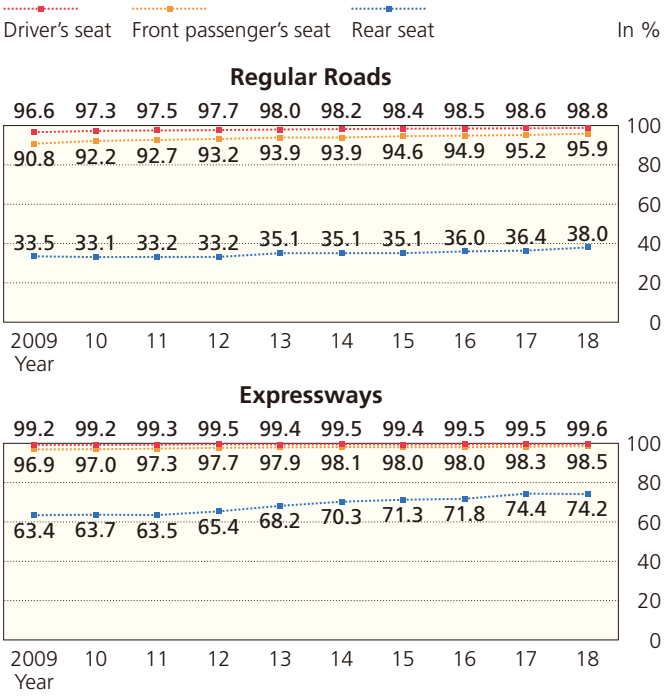


ROAD ACCIDENTS/INJURIES/FATALITIES (exact figures)

Year	Accidents	Injuries (Number of persons)	Fatalities (Number of persons)
1970	718,080	981,096	16,765
1975	472,938	622,467	10,792
1980	476,677	598,719	8,760
1985	552,788	681,346	9,261
1990	643,097	790,295	11,227
1995	761,794	922,677	10,684
2000	931,950	1,155,707	9,073
2005	934,346	1,157,113	6,937
2009	737,637	911,215	4,979
2010	725,924	896,297	4,948
2011	692,084	854,613	4,691
2012	665,157	825,392	4,438
2013	629,033	781,492	4,388
2014	573,842	711,374	4,113
2015	536,899	666,023	4,117
2016	499,201	618,853	3,904
2017	472,165	580,850	3,694
2018	430,601	525,846	3,532

Source: National Police Agency

SEATBELT USE RATES BY SEAT POSITION



Notes: 1. The survey on seatbelt use is conducted annually in October. 2. 2018 survey samples totalled roughly 410,000 on regular roads and 89,000 on expressways.

Sources: National Police Agency; Japan Automobile Federation

Wider ITS Applications and Advanced Safety Vehicle Technologies

Intelligent Transport Systems aim to radically improve transport safety, efficiency and convenience through the use of information and communication technologies integrating road users, road infrastructure, and vehicles. More than 20 years have passed since the Japanese government formulated its Comprehensive Concept for the Promotion of ITS in 1996, during which time the deployment of ITS technologies has seen broad expansion. Advanced navigation systems are in wide use, as are ETC (electronic toll collection) and smart highway toll stations using ETC exclusively. Numerous technologies developed on the basis of Advanced Safety Vehicle (ASV) research are also in application.

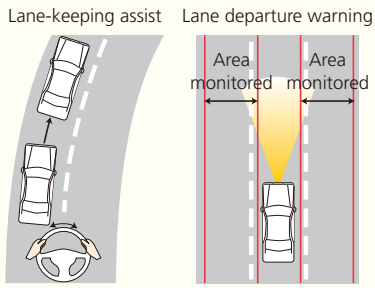
EXPANDING AVAILABILTY OF ASV TECHNOLOGIES IN THE MARKET

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

PRACTICAL APPLICATION OF ASV TECHNOLOGIES

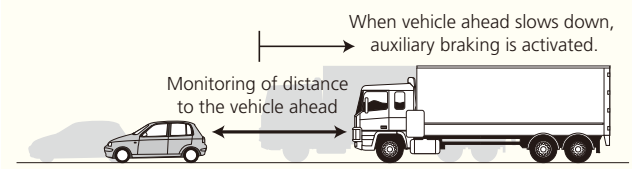
1. Lane-Keeping Assist

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



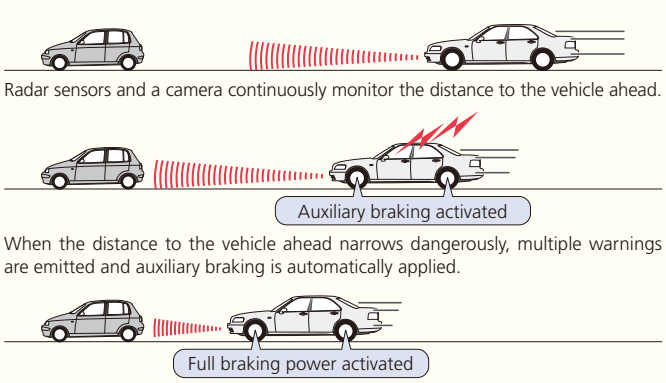
2. Full-Range Adaptive Cruise Control

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



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

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

THE "SAFETY SUPPORT CAR" Ver 1.0 CONCEPT

Safety Support Car (or "Sapocar")	Safety Support Car S (or "Sapocar S")	"Sapocar S" Classification The "Sapocar S" concept has three sub-classifications, based on the safety features installed.	
サポカー Safety Support Car Passenger cars equipped with automatic braking; suitable for all drivers	サポカーS Safety Support Car S Passenger cars equipped with automatic braking and accelerator suppression for pedal misapplication; suitable especially for elderly drivers	Type: "Wide"	Automatic braking (pedestrian collision avoidance) Accelerator suppression for pedal misapplication (1) Lane departure warning (2) Advanced headlamp control (3)
		Type: "Basic +"	Automatic braking (vehicle collision avoidance) Accelerator suppression for pedal misapplication (1)
		Type: "Basic"	Automatic braking (vehicle collision avoidance) for low-speed vehicle operation (4) Accelerator suppression for pedal misapplication (1)

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

Equipping More Vehicles with Advanced Safety Features

The automotive industry continuously strives for greater *active* safety by upgrading vehicle safety equipment and expanding its onboard installation rates, to help prevent accident occurrence. For example, 77.9% of the totality of passenger cars produced in 2017 for the domestic market were equipped with forward collision-mitigation braking systems (including those for low-speed vehicle operation) and 65.2% 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 2017 for home market)

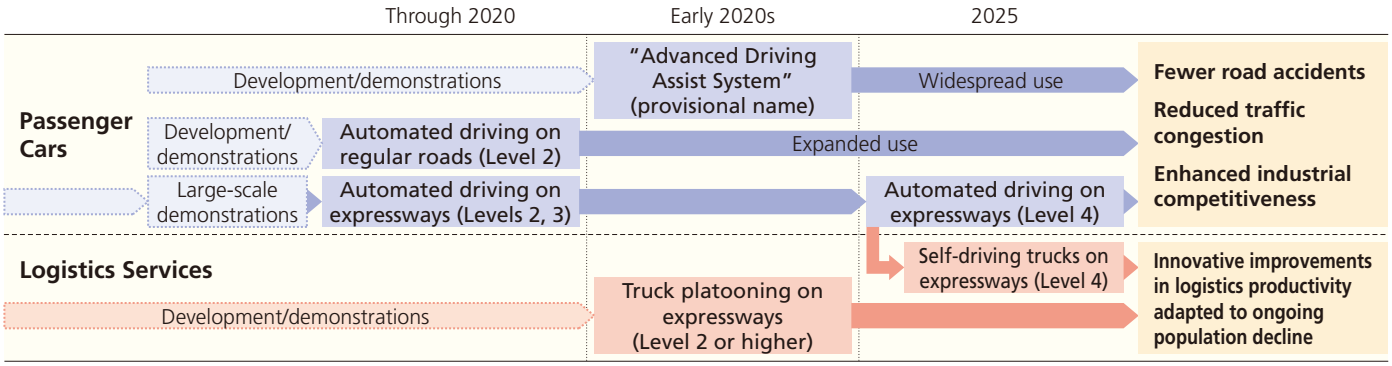
	Safety Feature	Installation Status				
		In no. of models (1)		In % (2)	In vehicle units	In % (2)
Active Safety	Brake assist	174	(162)	98.9	4,027,558	99.6
	Unfastened seatbelt warning (front passenger's seat)	125	(113)	71.0	3,184,872	78.8
	Power-window jamming prevention (with auto-up function)	171	(158)	97.2	4,032,457	99.8
	Power-window jamming prevention (without auto-up function)	33	(32)	18.8	706,440	17.5
	High-intensity discharge headlamps	162	(65)	92.0	2,573,867	63.7
	Adaptive front-lighting system (AFS)	26	(11)	14.8	176,532	4.4
	Backing-up monitoring (rear obstacle detection)	131	(27)	74.4	1,969,789	48.7
	Vehicle perimeter monitoring	59	(6)	33.5	612,996	15.2
	Vehicle perimeter obstacle warning	63	(16)	35.8	946,270	23.4
	Blind-corner monitoring	40	(3)	22.7	228,471	5.7
	Night vision monitoring	1	(0)	0.6	68	0.0
	Curve detection	24	(7)	13.6	153,031	3.8
	Tire pressure monitoring	18	(14)	10.2	77,981	1.9
	Driver inattention warning	67	(17)	38.1	972,843	24.1
	Inter-vehicle distance warning	119	(32)	67.6	2,767,419	68.5
	Lane departure warning	115	(31)	65.3	2,564,827	63.5
	Rear collision warning-equipped headrest control	3	(0)	1.7	413	0.0
	Forward collision-mitigation braking system	118	(32)	67.0	2,593,939	64.2
	Forward collision-mitigation braking system (for low-speed vehicle operation)	30	(3)	17.0	552,517	13.7
	Accelerator suppression for pedal misapplication	114	(22)	64.8	2,637,227	65.2
	Adaptive cruise control	64	(23)	36.4	1,060,099	26.2
	Adaptive cruise control with low-speed following mode	25	(11)	14.2	530,351	13.1
	Full-range adaptive cruise control	36	(13)	20.5	606,850	15.0
	Lane-keeping assist	47	(14)	26.7	915,871	22.7
	Backing-up monitoring (parking assistance)	20	(0)	11.4	183,935	4.6
	Navigator-based gearshift control	13	(2)	7.4	44,364	1.1
	Pre-crash seatbelts	8	(3)	4.5	9,680	0.2
	Electronic stability control	169	(150)	96.0	3,914,087	96.8
	Traction control with anti-lock braking system	149	(138)	84.7	3,414,689	84.5
	Navigator-based stop sign alert with brake assist	11	(4)	6.3	24,791	0.6
	Rearward-approaching-vehicle warning	38	(6)	21.6	468,917	11.6
	Emergency braking warning	129	(108)	73.3	3,353,465	83.0
	Vehicle proximity warning (for HVs/EVs) (3)	60	(52)	65.2	1,095,258	63.3
	Automatic high-to-low-beam headlamp control	74	(14)	42.0	1,303,116	32.2
	Glare-free high beam headlamp control	20	(2)	11.4	185,424	4.6
	Backing-up monitoring (moving-object warning)	34	(3)	19.3	399,887	9.9
	Backing-up collision-mitigation braking system	6	(1)	3.4	29,357	0.7
	Vehicle perimeter-based collision-mitigation braking system (for low-speed operation)	23	(1)	13.1	393,961	9.7
	Rear collision-mitigation braking system	35	(3)	19.9	500,871	12.4
	Lane departure prevention	60	(18)	34.1	1,016,878	25.2
Passive Safety	Side airbags	140	(69)	79.5	1,821,320	45.1
	Curtain airbags	135	(66)	76.7	1,488,745	36.8
	Active head restraints	126	(125)	71.6	3,108,923	76.9
	ISOFIX anchorages (for child safety seats)	156	(143)	88.6	3,555,932	88.0
	Three-point seatbelt for rear center seat (4)	126	(118)	86.3	2,606,825	83.3
	Automatic collision notification (ACN)	18	(14)	10.2	80,124	2.0
	Advanced automatic collision notification (AACN)	35	(16)	19.9	214,442	5.3
	Total	**176**			**4,042,012**	

(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 2017 a total of 92 hybrid/electric car models (1,730,722 vehicle units) were produced. (4) In 2017 a total of 146 passenger car models (3,130,812 vehicle units) were produced, excluding mini and other passenger cars which are not eligible for rear seat inclusion.
Notes: 1. Passenger cars here include minicars. 2. Criteria for inclusion in the calculations whose results are shown here were revised in 2015. *Source: Japan Automobile Manufacturers Association*

The Transition to Automated Driving

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 2019 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 full-scale automated driving systems on expressways and expand their use in freight transport by 2025. JAMA is actively participating in the initiatives being undertaken for the practical use of automated driving technologies.

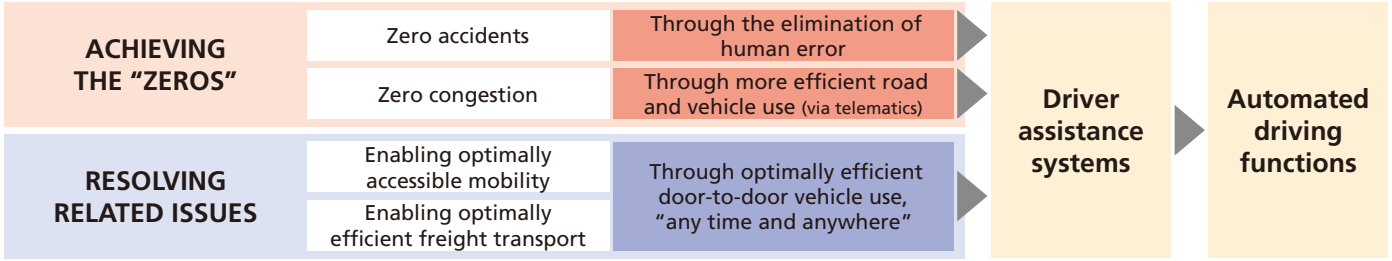
TIMELINE FOR THE PROMOTION OF AUTOMATED DRIVING (as formulated by the Japanese government)



Source: The Public-Private ITS Initiative/Roadmaps 2019 *(Japanese government)*

JAMA'S VISION OF AUTOMATED DRIVING

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



AUTOMATED DRIVING DEMONSTRATIONS IN TOKYO

To promote the goal of "Achieving optimally safe, accessible, and efficient mobility," JAMA will conduct public automated driving demonstrations just prior to the 2020 Tokyo Olympic and Paralympic Games, from July 6 through July 12. Equipped with Level 2 to Level 4 automated driving technologies, about 80 vehicles from ten JAMA member automakers will be in operation and providing demonstration rides in the Haneda Airport area, from Haneda Airport to central Tokyo and to Tokyo Waterfront City, and within the Tokyo Waterfront City area.

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

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

SUMMARY OF THE JAMA-FORMULATED MOBILITY VISION

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

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

Priority mobility issues in the future		2030	20XX
Safe and secure travel for everyone		• From controlling human errors to more advanced risk prediction	NO traffic accidents
Further reduction of the environmental burden		• Improve not only driving performance, but also environmental performance over lifecycle	NO environmental burden
Efficient travel	Reduction in travel time	• Achieve smooth traffic flow, in addition to providing traffic information	NO time-wasting on travel
	Effective use of travel time	• From comfortable driving to comfortable and useful ways of using travel time	
	Enhancement of shared mobility / public transportation	• Multiple forms of transport in addition to sharing	
Improvement of logistics productivity		• From reduction of drivers' workload to needing less personnel • Improve the transport efficiency of the whole logistics network, instead of each part	
Solutions to travel restrictions	Geographical factors	• Provide sustainable transportation for people/areas facing practical travel restrictions	Free travel of ANYONE/ ANYTHING
	Ability factors		
Smooth travel even for visitors to Japan		• Universal transport regardless of language ability	MAXIMUM excitement
Response to increasingly diverse values		• Propose attractive products/services tailored to individual lifestyles	

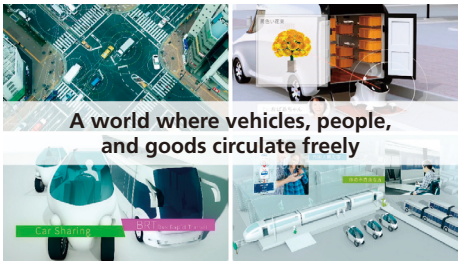
Go beyond
the limits of human ability
with technology
- ITS/automated driving
- Electrification
- Connectivity

×

Provide solutions
beyond hardware improvement
- Services as well as products
- Mobility, not just a car

A world where everyone feels safe and secure

A world filled with smiles and greenery



A world where vehicles, people, and goods circulate freely

A world where mobile society brings PLEASURE to people all around the world

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

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

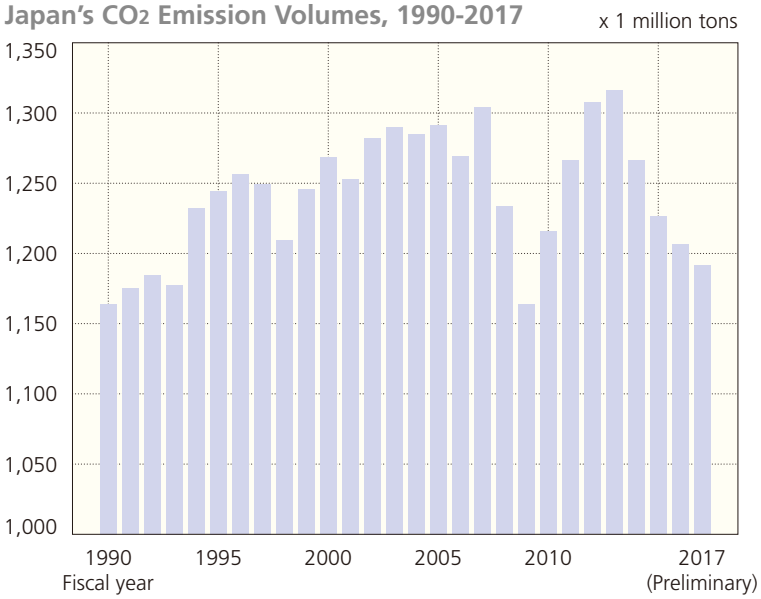
Climate Change and CO_2 Emissions Reduction: The Response of the Transport Sector

In 2017 Japan's CO_2 emissions totalled 1.19 billion tons (preliminary figure), of which the transportation sector accounted for nearly 18%. Since peaking in 2001 following a decade of growth, CO_2 emission volumes in Japan's transport sector have steadily declined, owing largely to increased fuel efficiency in passenger cars and greater efficiency in goods distribution. The automobile industry will continue to vigorously promote CO_2 emissions reduction in road transport by further improving vehicle fuel efficiency and expanding the market supply of next-generation vehicles.

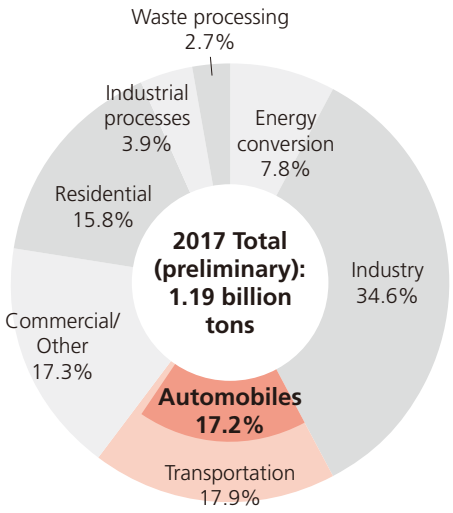
CO_2 EMISSIONS IN JAPAN

The transportation sector accounts for nearly 18% of Japan's total CO_2 emissions, which in 2017 amounted to 1.19 billion tons (preliminary figure).

Japan's CO_2 Emission Volumes, 1990-2017



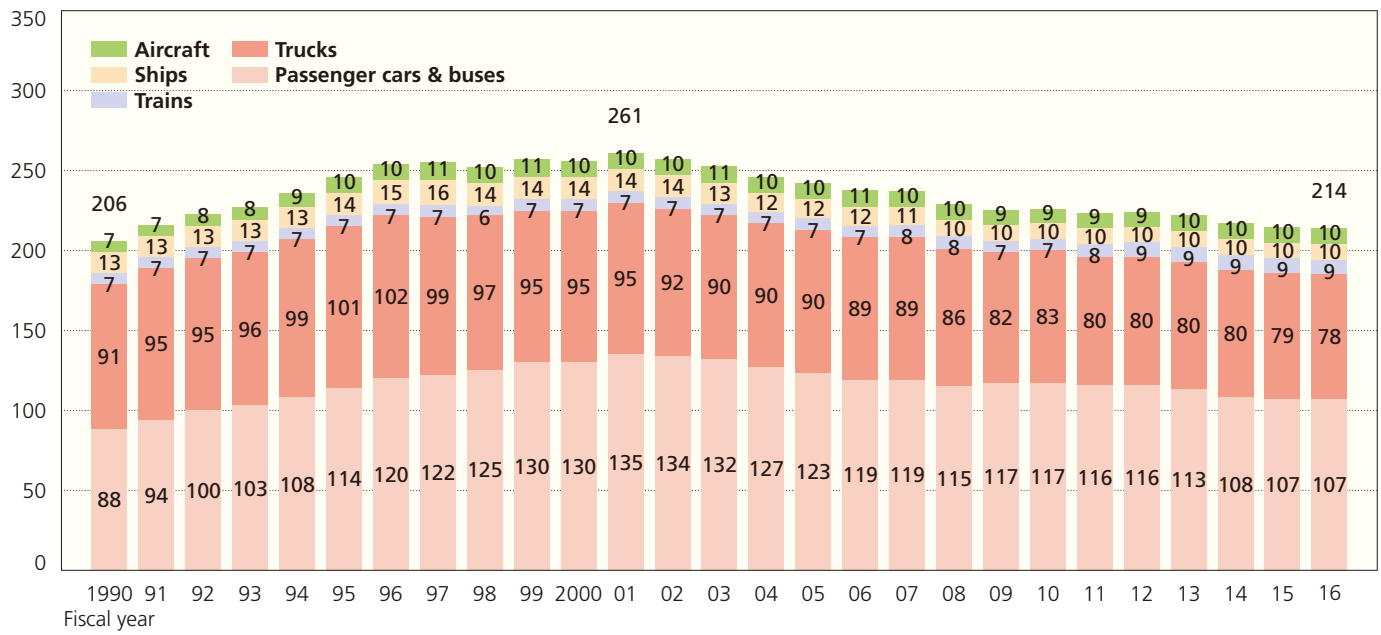
CO_2 Emission Shares by Sector in 2017



Source: Ministry of the Environment

TRENDS IN CO_2 EMISSION VOLUMES IN JAPAN'S TRANSPORT SECTOR, BY MODE

Motor vehicle-emitted CO_2 accounts for about 90% of the totality of CO_2 emitted by Japan's transport sector. CO_2 emissions from road transportation in Japan have seen a significant decrease since transport-sector emissions peaked in 2001.

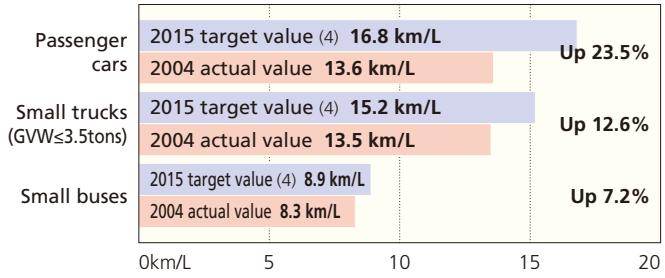


Source: Ministry of the Environment

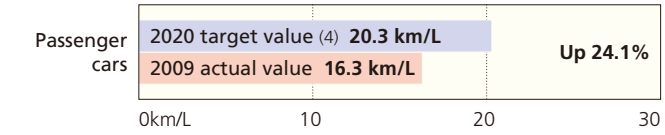
CO_2 Emissions Reduction: Improving Vehicle Fuel Efficiency

Fuel efficiency targets for passenger cars, trucks, and buses are formulated by applying "top runner" criteria whereby the target value for a given vehicle weight category is established based on the leading fuel efficiency performance to date for that weight category. To comply with stringent 2015 average fuel efficiency targets for passenger cars and small trucks and buses as well as for heavy-duty vehicles and, subsequently, with even stricter 2020 targets for passenger cars and 2022 targets for small trucks, JAMA member manufacturers have been making continuous efforts to increase the fuel efficiency of conventional vehicles and expand the supply of alternative-energy vehicles. A joint council set up in June 2019 by the Ministry of Economy, Trade and Industry and the Ministry of Land, Infrastructure, Transport and Tourism agreed on an average fuel efficiency target for new passenger cars of 25.4 km/L (a 32.4% increase over the actual value in 2016) by 2030, whose official adoption will be undertaken via the requisite legal channels in due course.

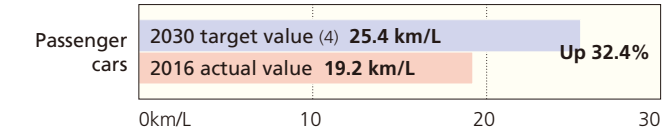
2015 AVERAGE FUEL EFFICIENCY TARGETS FOR NEW PASSENGER CARS & SMALL TRUCKS/BUSES (1)



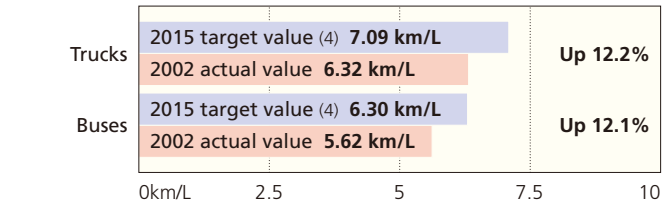
2020 AVERAGE FUEL EFFICIENCY TARGET FOR NEW PASSENGER CARS (1)



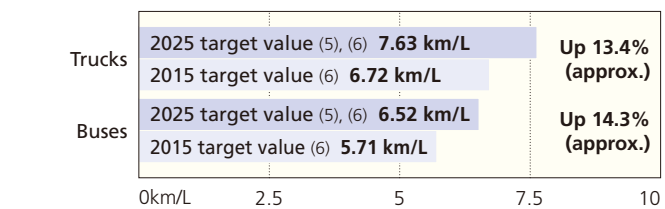
2030 AVERAGE FUEL EFFICIENCY TARGET FOR NEW PASSENGER CARS (2)



2015 AVERAGE FUEL EFFICIENCY TARGETS FOR NEW HEAVY-DUTY VEHICLES (GVW>3.5t) (3)

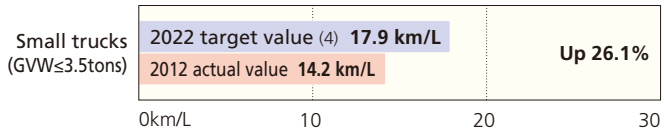


2025 AVERAGE FUEL EFFICIENCY TARGETS FOR NEW HEAVY-DUTY VEHICLES (GVW>3.5t)



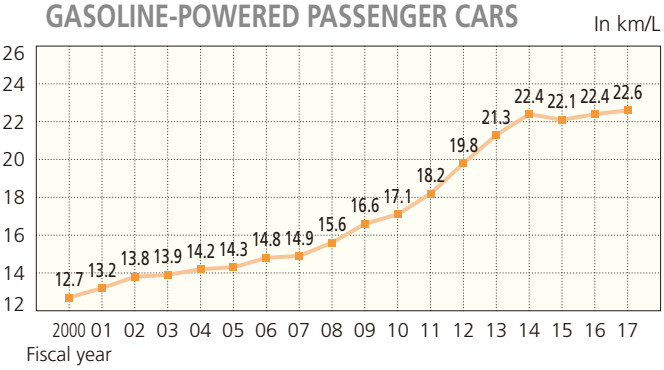
(1) Fuel efficiency is JC08 test cycle-based (see page 37). (2) Fuel efficiency is WLTC-based (see page 37). (3) Fuel efficiency is JE05 test cycle-based. (4) Targets were established assuming the same shipment volume ratios by vehicle weight category for target years as those recorded in the years showing the actual value of fuel efficiency performance. (5) 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. (6) 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

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



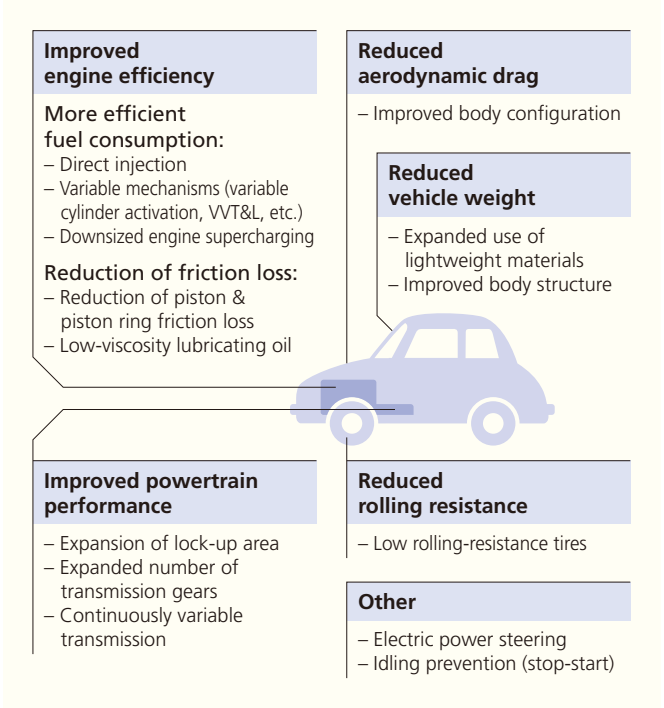
(1) Fuel efficiency is JC08 test cycle-based (see page 37). (4) Targets were established assuming the same shipment volume ratios by vehicle weight category for target years as those recorded in the years showing the actual value of fuel efficiency performance.
Sources: Ministry of Economy, Trade and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

AVERAGE FUEL EFFICIENCY OF DOMESTIC NEW GASOLINE-POWERED PASSENGER CARS



Note: Figures here are JC08 test cycle-based (see page 37).
Source: Japan Automobile Manufacturers Association

VEHICLE TECHNOLOGIES FOR INCREASED FUEL EFFICIENCY



In-Use Status of Next-Generation Vehicles

Since 2009, when the government's tax incentive/subsidy programs for the purchase of eco-friendly vehicles were first introduced, new registrations of (so-called in Japan) next-generation vehicles—including hybrid, plug-in hybrid, electric, fuel cell, clean diesel, and other new-energy vehicles—have been steadily increasing. As a result of each automaker's efforts to develop a range of such models, the share of next-generation vehicles in new passenger car registrations in 2018 reached nearly 38%. 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.

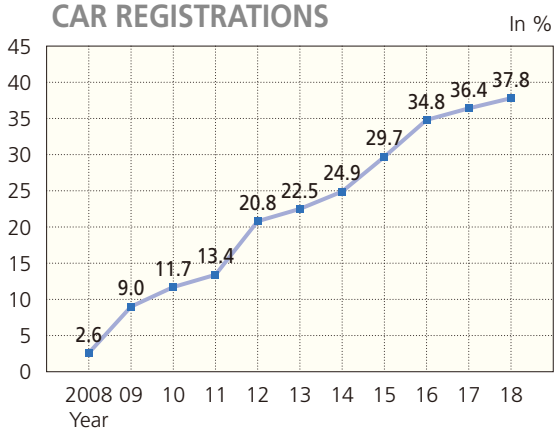
NEXT-GENERATION PASSENGER CAR NEW REGISTRATIONS, 2008-2018

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	154,803	1,595,091
2018	1,431,980	23,230	26,533	612	176,725	1,659,080

Source: Japan Automobile Manufacturers Association

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

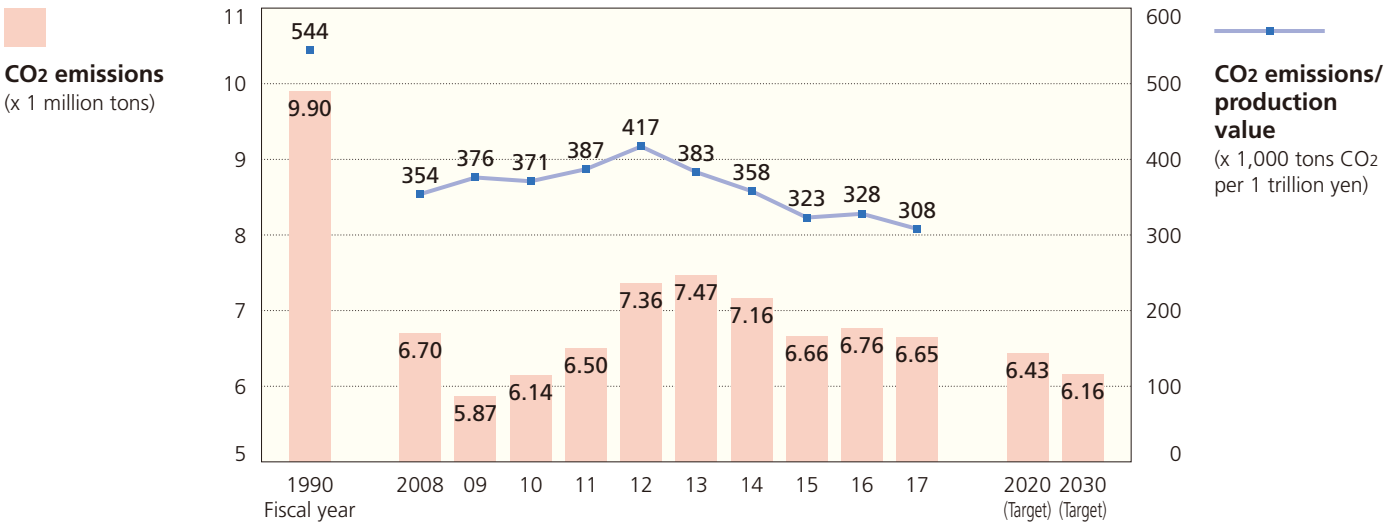


Source: Japan Automobile Manufacturers Association

CO_2 Reductions at Manufacturers' Facilities

Japan's automakers, together with the member companies of the Japan Auto-Body Industries Association (JABIA), have for years taken measures to reduce energy consumption and otherwise cut CO_2 emissions at their production plants. Having more recently expanded their voluntary CO_2 reduction activities to also include administrative and research facilities, their combined facility-emitted CO_2 in 2017 totalled 6.65 million tons (preliminary figure), down 110,000 tons from the previous year. In line with targets set in 2016, JAMA and JABIA members aim to reduce their combined facility-emitted CO_2 to 6.43 million tons (a 35% reduction from the 1990 level) by 2020 and to 6.16 million tons (a 38% reduction from 1990) by 2030.

FACILITY-GENERATED CO_2 EMISSION VOLUMES, 1990-2017



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, except for fluorescent cabin lamps which will be mercury-free in the near future.
Hexavalent chromium	Banned as of January 2008.	All models have complied since January 2008.
Cadmium	Banned as of January 2007.	All models have complied since January 2006.

A Voluntary Approach to Reducing Vehicle Cabin VOCs

New-model passenger cars marketed in and after 2007 and new-model commercial vehicles sold in and after 2008 have met the target values established 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 μg/m^3 (0.08 ppm)	Adhesives for plywood, wallpaper, etc.
Toluene	260 μg/m^3 (0.07 ppm)	Adhesives/paints for interior finishing materials, furniture, etc.
Xylene	870 μg/m^3 (0.20 ppm)	Adhesives/paints for interior finishing materials, furniture, etc.
Paradichlorobenzene	240 μg/m^3 (0.04 ppm)	Moth repellents, lavatory air fresheners
Ethylbenzene	3,800 μg/m^3 (0.88 ppm)	Adhesives/paints for plywood, furniture, etc.
Styrene	220 μg/m^3 (0.05 ppm)	Insulation materials, bath units, tatami-mat core materials
Chlorpyrifos	1 μg/m^3 (0.07 ppb)	Insecticides (esp. ant exterminators)
Di-*n*-butyl phthalate	220 μg/m^3 (0.02 ppm)	Paints, pigments, adhesives
Tetradecane	330 μg/m^3 (0.04 ppm)	Kerosene, paints
Di-2-ethylhexyl phthalate	120 μg/m^3 (7.6 ppb)	Wallpaper, flooring materials, wire-coating materials
Diazinon	0.29 μg/m^3 (0.02 ppb)	Pesticides
Acetaldehyde	48 μg/m^3 (0.03 ppm)	Adhesives for construction materials, wallpaper, etc.
Fenobucarb	33 μg/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 2017 the volume of auto plant-generated waste destined for landfill disposal totalled 300 tons. Having long surpassed the target of 1,000 tons set for 2020, JAMA members will nevertheless continue to promote the reduction of plant-generated waste for landfill disposal.

INDUSTRY MEASURES IN LINE WITH NATIONAL LEGISLATION

	Promotion of Effective Utilization of Resources Law (the "3R" Law)		Distribution, Servicing and Use	End-of-Life Vehicle Recycling Law
	Product Design	Waste Management		ELV Recycling
"Reduce" initiatives	For designated products (1): - Weight reduction/ Downsizing - Longer product life - Reduced use of hazardous substances	For designated areas of activity: - Reduction/recycling of designated waste products generated in vehicle manufacturing operations: 1) Scrap metals 2) Casting sand residue		Basic premise: - Environmentally responsible vehicle design on the part of automobile manufacturers
"Reuse" initiatives	For designated products (2): - Use of reusable/recyclable materials - Ease of dismantling - Ease of sorting - Non-hazardous recycling - Materials identification			
"Recycle" initiatives		- Total waste volume*: 1990 (baseline): 352,000 tons ↓ 2017: 300 tons JAMA target: 1,000 tons by fiscal 2020 *For landfill disposal, including scrap metals, casting sand residue, and other waste		- Recovery and recycling of: 1) Fluorocarbons 2) Airbags 3) ASR Note: Motorcycles are not covered by the ELV Recycling Law.

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

ELV RECOVERY IN NUMBERS

In vehicle units

Fiscal Year		2017	2018
No. of ELVs recovered		3,304,942	3,378,995
Appropriate disposal of three designated items	Fluorocarbons	2,861,858	2,935,936
	Airbags (1)	2,639,270	2,764,427
	ASR (2)	3,197,796	3,546,868

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

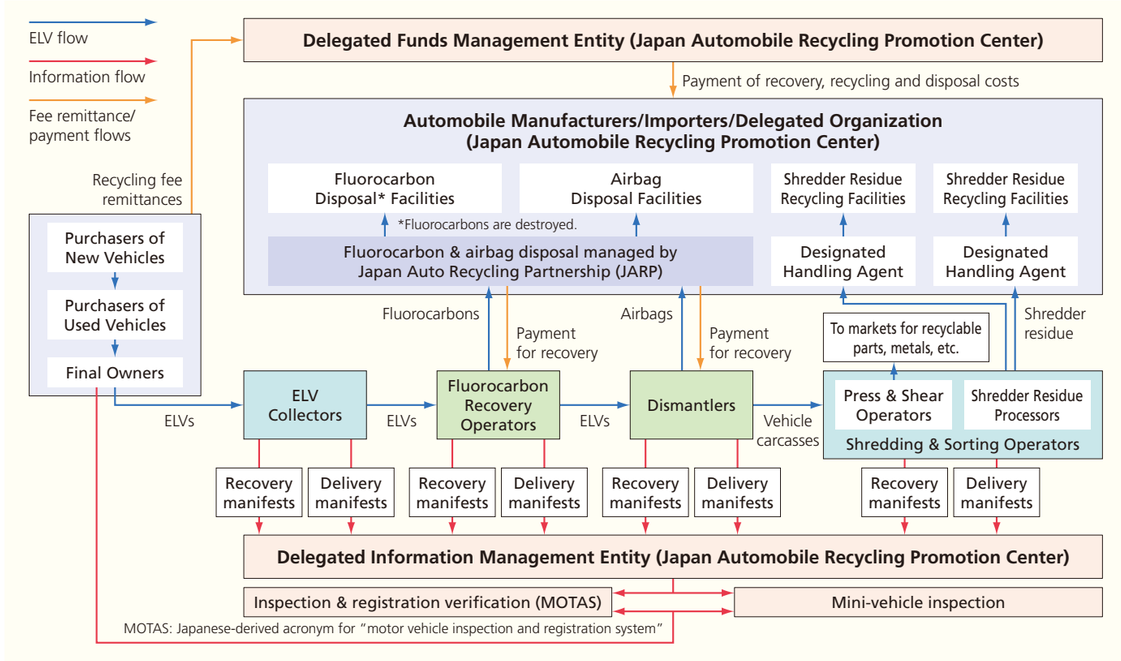
Sources: Japan Automobile Recycling Promotion Center; Japan Auto Recycling Partnership; Toyotsu Recycle Corporation; "ART" group of companies

RECYCLING RATES: TARGETED & ACHIEVED

Three Designated Items	Target	Achieved
Fluorocarbons	Destruction	2.97 million vehicle units (2017)
Airbags	85%	94% (2017)
ASR	2005: 30% 2010: 50% 2015: 70%	97.9-98.9% (2017)

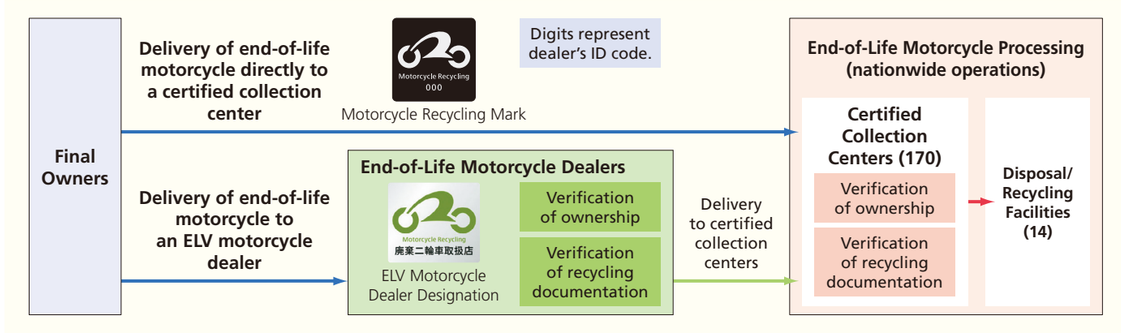
Sources: Government-affiliated entities

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.

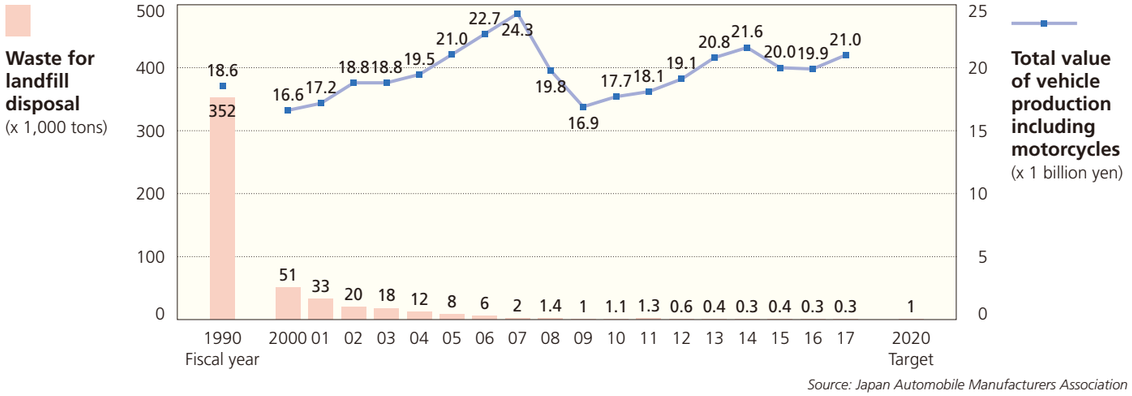
THE MOTORCYCLE RECYCLING FLOW



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
			WLTC (g/km) (1)	2018	PM (2)	0.005
	Trucks and buses	Mini	WLTC (g/km) (1)	2019	CO	4.02
					NMHC	0.10
					NOx	0.05
			WLTC (g/km) (1)	2019	PM (2)	0.005
		Light-duty (GVW≤1.7t)	WLTC (g/km) (1)	2018	CO	1.15
					NMHC	0.10
					NOx	0.05
			WLTC (g/km) (1)	2018	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
			WLTC (g/km) (1)	2019	PM (2)	0.007
		Heavy-duty (GVW>3.5t)	JE05 (g/kWh)	2009	CO	16.0
					NMHC	0.23
					NOx	0.7
					PM (2)	0.01
Diesel Vehicles	Passenger cars (3)		WLTC (g/km) (1)	2018	CO	0.63
					NMHC	0.024
					NOx	0.15
					PM	0.005
	Trucks and buses	Light-duty (GVW≤1.7t)	WLTC (g/km) (1)	2018	CO	0.63
					NMHC	0.024
					NOx	0.15
					PM	0.005
		Medium-duty (1.7t<GVW≤3.5t)	WLTC (g/km) (1)	2019	CO	0.63
					NMHC	0.024
					NOx	0.24
					PM	0.007
		Heavy-duty (GVW>3.5t)	WHTC (g/kWh) (4)	2016	CO	2.22
					NMHC	0.17
					NOx (5)	0.4
					PM	0.01
Motorcycles	**Class Ⅰ motorcycles*** Under 0.150L in engine capacity with a maximum speed of 50km/h, or under 0.150L in engine capacity with a maximum speed of 99km/h. *Equivalent to motor-driven cycles, Class 1 and Class 2.		WMTC (g/km) (6)	2016 (7)	CO	1.14
					THC	0.30
					NOx	0.07
	Class Ⅱ motorcycles* Under 0.150L in engine capacity with a maximum speed of <130km/h, or 0.150L or over in engine capacity with a maximum speed of <130km/h. *Equivalent to mini-sized and small-sized motorcycles with a maximum speed of <130km/h.		WMTC (g/km) (6)	2016 (7)	CO	1.14
					THC	0.20
					NOx	0.07
	Class Ⅲ motorcycles* With a maximum speed of ≥130km/h. *Equivalent to mini-sized and small-sized motorcycles with a maximum speed of ≥130km/h.		WMTC (g/km) (6)	2016 (7)	CO	1.14
					THC	0.17
					NOx	0.09

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

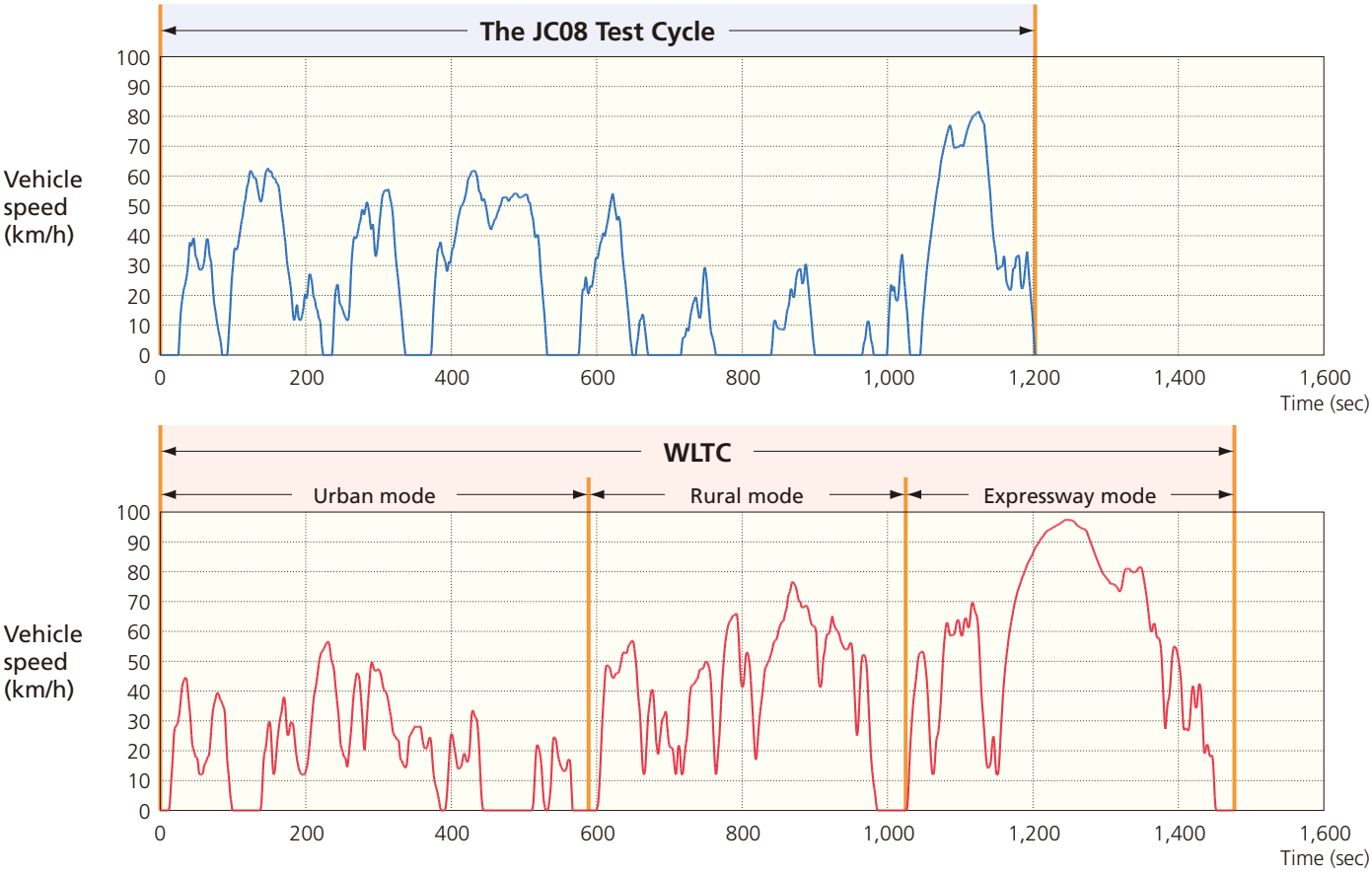
Note: CO: Carbon monoxide; NMHC: Non-methane hydrocarbons; THC: Total hydrocarbons; NOx: Nitrogen oxides; PM: Particulate matter.

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

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

Japan not only promotes the international standardization of test cycles for measuring motor vehicle fuel consumption and CO_2 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モード

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モード (2)

20.4 km/L

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

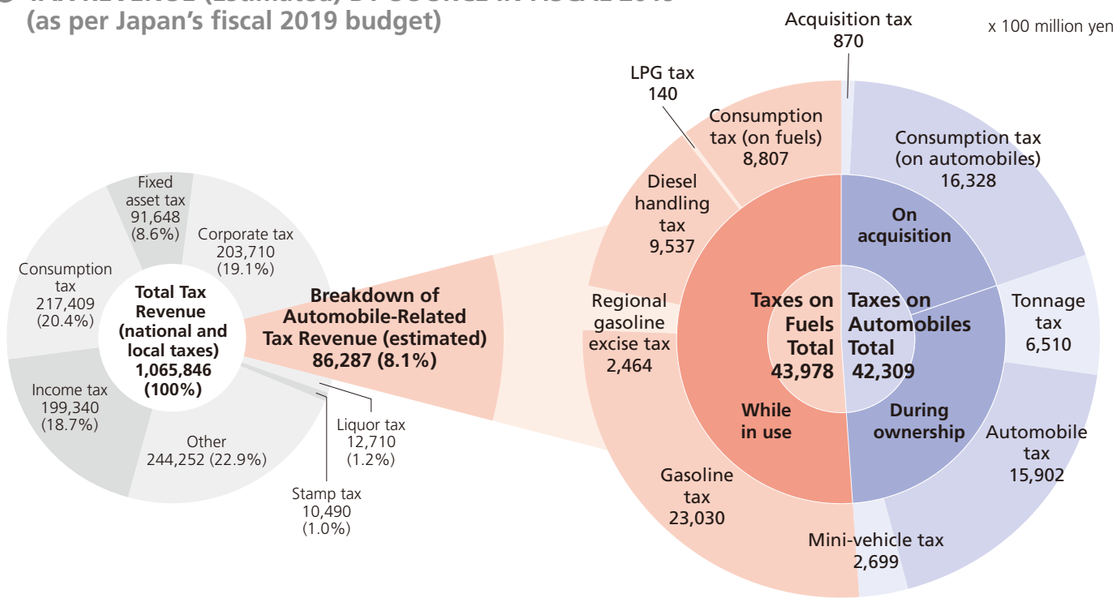
(1) Fuel consumption rates are obtained on the basis of designated test conditions. In real-world on-road driving, rates will vary as a result of multiple factors (weather and traffic conditions, driving behavior, use of air conditioner, etc.).

(2) WLTC is an international test cycle incorporating urban, rural and expressway driving cycles or "modes" with specific time durations designated for each mode.
Urban mode: (Assumptions) Low-speed driving characterized by frequent stops and starts owing to numerous traffic signals and congestion
Rural mode: (Assumptions) Steady driving characterized by fewer stops and starts owing to fewer traffic signals and less congestion than in urban driving
Expressway driving mode: (Assumptions) High-speed driving typical of highway driving

9 Trillion Yen in Annual Automobile-Related Tax Revenue

Since the initial earmarking of funds for road construction and road maintenance programs in line with Japan's first five-year road improvement plan in 1954, there has been a steady increase both in the number of automobile-related taxes assessed on users and in their respective rates. Currently, the automobile tax structure consists of nine different taxes, creating a very heavy tax burden for motor vehicle owners in Japan. Under the government's budget for fiscal 2019, the total value of tax revenue from these automobile-related taxes has been estimated at 8.6 trillion yen, or 8.1% of Japan's projected total tax revenue of 106.6 trillion yen in fiscal 2019.

TAX REVENUE (Estimated) BY SOURCE IN FISCAL 2019 (as per Japan's fiscal 2019 budget)



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

Sources: Ministry of Finance; Ministry of Internal Affairs and Communications

AUTOMOBILE-RELATED TAXES IN JAPAN (as of May 1, 2019)

Tax Category	On Acquisition		During Ownership
	Acquisition Tax	Consumption Tax	Tonnage Tax
How Assessed	Assessed on the acquisition of an automobile, whether new or used, based on the purchase price	Assessed on the purchase price of the automobile	Assessed according to vehicle weight at each mandatory vehicle inspection
National/Local Tax	Prefectural tax	National and local tax	National tax
Tax Rate/ Amount	(Private use) - 3% of purchase price (2% for commercial vehicles and mini-vehicles) - Exempted for vehicles purchased for ¥500,000 or less Note: For eco-friendly vehicles, reductions/exemptions apply to the acquisition tax from April through September 2019 (see page 40).	8% (of which 1.7% is a local tax)	1) Eco-friendly vehicles: ¥2,500/0.5t/year (= base rate) for private-use passenger cars 2) Vehicles on the road 18 years or longer since first registration: ¥6,300/0.5t/year for private-use passenger cars 3) Vehicles on the road 13 years or longer since first registration: ¥5,700/0.5t/year for private-use passenger cars 4) Other vehicles for private use: - Passenger cars: ¥4,100/0.5t/year - Trucks (GVW>2.5t): ¥4,100/t/year; Trucks (GVW≤2.5t): ¥3,300/t/year - Buses: ¥4,100/t/year; Mini-vehicles: ¥3,300/year - Motorcycles (251cc and over): ¥1,900/year - Motorcycles (126 to 250cc): ¥4,900 upon registration Note: For eco-friendly vehicles, reductions/exemptions apply to the tonnage tax from May 2019 through April 2021 (see page 40).

JAPAN'S ESTIMATED AUTOMOBILE-RELATED TAX REVENUE IN FISCAL 2019

			Tax Revenue (x 100 million yen)	Base Tax Rate (for reference)	Current Tax Rate	Comparison with Base Tax Rate (multiplier value)
Taxes on Automobiles	On acquisition	Acquisition tax	870	3%	3% (commercial and mini-vehicles excluded)	1.00
		Consumption tax (on automobiles)	16,328	8%		
	During ownership	Tonnage tax	6,510	¥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	15,902	Based on engine capacity (e.g., for 1,001≤1,500cc passenger cars, ¥34,500/year; see below)		
		Mini-vehicle tax	2,699	¥10,800/year (passenger cars for private use)		
		Total	42,309			
Taxes on Fuels	While in use	Gasoline tax	23,030	¥24.3/L	¥48.6/L	2.00
		Regional gasoline excise tax	2,464	¥4.4/L	¥5.2/L	1.18
		Diesel handling tax	9,537	¥15.0/L	¥32.1/L	2.14
		LPG tax	140	¥17.5/kg		1.00
		Consumption tax (on fuels)	8,807	8%		
		Total	43,978			
Grand Total			86,287			

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, 2019.

TAX RATES IN EFFECT (Examples), 1954-2019, TO SUPPORT ROAD NETWORK IMPROVEMENTS

Duration	"Five-Year" Plan	Fiscal Year	Acquisition Tax	Tonnage Tax ¥/0.5t/year	Gasoline Tax ¥/L	Regional Gasoline Excise Tax ¥/L	Diesel Handling Tax ¥/L	LPG Tax ¥/kg
1954-57	First	1954			13.0			
		1955			11.0	2.0		
		1956			↓	↓	6.0	
		1957			14.8	3.5	8.0	
1958-60	Second				↓	↓	↓	
		1959			19.2		10.4	
1961-63	Third				↓		↓	
		1961	[Commercial and mini-vehicles excluded]	[In the case of a passenger car for private use]	22.1	4.0	12.5	
1964-66	Fourth	1964			24.3	4.4	15.0	
		1966			↓	↓	↓	5
1967-69	Fifth	1967			↓	↓	↓	10
		1968	3%		↓	↓	↓	↓
1970-72	Sixth	1970	↓		↓	↓	↓	17.5
		1971	↓	2,500	↓	↓	↓	↓
1973-77	Seventh	1974	5%	5,000	29.2	5.3	19.5	↓
		1976	↓	6,300	36.5	6.6	24.3	↓
1978-82	Eighth	1979	↓	↓	45.6	8.2	↓	↓
1983-87	Ninth		↓	↓	↓	↓	↓	↓
1988-92	Tenth		↓	↓	↓	↓	↓	↓
1993-97	Eleventh	1993	↓	↓	48.6	5.2	32.1	↓
1998-2002	Twelfth	1998	↓	↓	↓	↓	↓	↓
2003-07	As per the national priority infrastructure development plan		↓	↓	↓	↓	↓	↓
2008-	As per the national medium-term road infrastructure plan		↓	6,300 5,000 4,100 (2,500)	↓	↓	↓	↓
2010-11	—		↓	↓	↓	↓	↓	↓
2012-13	—		↓	↓	↓	↓	↓	↓
2014-18	—		↓	↓	↓	↓	↓	↓
2019-	—		3%	4,100 (2,500*)	48.6	5.2	32.1	17.5
Comparison with base tax rate (multiplier value)			1.00	1.64	2.00	1.18	2.14	1.00

Base tax rate

*The base tonnage tax rate (¥2,500/0.5t/year as of May 1, 2019) is applied only to eco-friendly vehicles.

Source: Japan Automobile Manufacturers Association

		While in Use				
Automobile Tax	Mini-Vehicle Tax	Gasoline Tax	Regional Gasoline Excise Tax	Diesel Handling Tax	LPG Tax	Consumption Tax
Fixed amount assessed on the owner each year as of April 1	Fixed amount assessed on the owner each year as of April 1	Assessed on gasoline		Assessed on light oil	Assessed on LPG	Assessed on the purchase price of fuels
		Included in the fuel price				
Prefectural tax	Municipal tax	National tax		Prefectural tax	National tax	National and local tax
Passenger cars for private use: - Up to 1,000cc ¥29,500/year - 1,001 to 1,500cc ¥34,500/year - 1,501 to 2,000cc ¥39,500/year - 2,001 to 2,500cc ¥45,000/year - 2,501 to 3,000cc ¥51,000/year - 3,001 to 3,500cc ¥58,000/year - 3,501 to 4,000cc ¥66,500/year - 4,001 to 4,500cc ¥76,500/year - 4,501 to 6,000cc ¥88,000/year - Over 6,000cc ¥111,000/year Note: Above tax rates apply to new private-use passenger cars registered on or after October 1, 2019 (see page 42).	1) Mini-vehicles for private use: - Passenger cars ¥10,800/year - Trucks ¥5,000/year Note: Above tax rates apply to new 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 41).	¥48.6/L	¥5.2/L	¥32.1/L (light oil)	¥17.5/kg (LPG)	8% of the purchase price of fuels (of which 1.7% is a local tax) [For light oil, imposed on the light oil price excluding the diesel handling tax]

Source: Japan Automobile Manufacturers Association

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

To help expedite the shift to low-carbon road transport in the interest of curbing global warming and to help improve air quality, the Japanese government has, since April 2009, applied auto-related tax incentives to promote the wider use of eco-friendly vehicles. Updated incentives and eligibility requirements came into effect in April and May 2019 and their effective periods were extended for two years with the exception of the incentives for the acquisition tax, which were extended for six months until October 2019, when the acquisition tax is to be abolished in tandem with the scheduled rise in the consumption tax.

INCENTIVES & ELIGIBILITY REQUIREMENTS

● ACQUISITION AND TONNAGE TAX REDUCTIONS/EXEMPTIONS

Period in effect: April 1, 2019 through September 30, 2019 for the acquisition tax; May 1, 2019 through April 30, 2021 for the tonnage tax.

1. Passenger Cars

Requirements		Tax Category		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** • **Clean diesel passenger cars** (complying with 2009 or 2018 emission standards)		Acquisition Tax		Exempt					
		Tonnage Tax	@ Initial & first vehicle inspections	Exempt (1)					
Gasoline vehicles/ LPG vehicles (including hybrids)	Emissions level / Fuel efficiency			2020 Fuel Efficiency Standards					
				Compliant	+10%	+20%	+30%	+40%	+90%
	Down by 75% from 2005 standards or Down by 50% from 2018 standards	Acquisition Tax		20% reduction	25% reduction	50% reduction		Exempt	
		Tonnage Tax	@ Initial vehicle inspection	25% reduction		50% reduction		Exempt (2)	

2. Small Trucks and Buses (GVW≤2.5t)

Requirements		Tax Category		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**		Acquisition Tax		Exempt				
		Tonnage Tax	@ Initial & first vehicle inspections	Exempt (1)				
Gasoline vehicles (including hybrids)	Emissions level / Fuel efficiency			2015 Fuel Efficiency Standards				
				+5%	+10%	+15%	+20%	+25%
	Down by 75% from 2005 standards or Down by 50% from 2018 standards	Acquisition Tax		20% reduction	40% reduction	60% reduction	80% reduction	Exempt
		Tonnage Tax	@ Initial vehicle inspection	25% reduction		50% reduction	75% reduction	Exempt

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

Requirements		Tax Category		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**		Acquisition Tax		Exempt		
		Tonnage Tax	@ Initial & first vehicle inspections	Exempt (1)		
	Emissions level / Fuel efficiency			2015 Fuel Efficiency Standards		
				+5%	+10%	+15%
Gasoline vehicles (including hybrids)	Down by 75% from 2005 standards or Down by 50% from 2018 standards	Acquisition Tax		50% reduction	75% reduction	Exempt
		Tonnage Tax	@ Initial vehicle inspection			Exempt
	Down by 50% from 2005 standards or Down by 25% from 2018 standards	Acquisition Tax		No incentive	50% reduction	75% reduction
		Tonnage Tax	@ Initial vehicle inspection			
Diesel vehicles (including hybrids)	NOx and PM emissions down by 10% from 2009 standards or Compliant with 2018 emission standards	Acquisition Tax		50% reduction	75% reduction	Exempt
		Tonnage Tax	@ Initial vehicle inspection			Exempt
	Compliant with 2009 emission standards	Acquisition Tax		No incentive	50% reduction	75% reduction
		Tonnage Tax	@ Initial vehicle inspection			

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

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

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

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

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

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

(1) Eligible vehicles are trucks (3.5t<GVW≤22t) and buses (including 10-person occupancy vehicles); buses with GVW>12t are required to be equipped with a lane departure warning system; electronic stability control systems are not included in the eligibility requirements for buses with GVW<5t. (2) Applied once, on initial inspection mandated for new vehicle purchase. (3) Applied once, at the time of new vehicle registration.
Notes: 1. The acquisition tax is assessed on the amount remaining after deduction. 2. When vehicles targeted by this scheme are also covered by the eco-friendly vehicle tax incentives scheme (see page 40), vehicle owners can opt either for one of the acquisition tax deductions shown here or for one of the acquisition tax reductions/exemptions prescribed in the eco-friendly vehicle tax incentives scheme. 3. When vehicles targeted by this scheme are also covered by the eco-friendly vehicle tax incentives scheme, the most favorable tonnage tax incentive between the two schemes is applied; when the tonnage tax incentive is identical in both schemes, it is implemented under the eco-friendly vehicle tax incentives scheme. 4. With the abolition of the acquisition tax taking effect on October 1, 2019, the incentives listed above under "Acquisition Tax" will remain in force from that date through March 31, 2021 as part of the new framework of automotive environmental performance-based tax measures (see page 43 for more information on those measures).

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

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

(1) Only vehicles complying with 2009 emission standards. (2) With NOx emissions down by 10% from 2009 emission standards. (3) With NOx emissions down by 10% from 2009 emission standards, or complying with 2018 emission standards. (4) Reductions effective on initial inspection mandated for new vehicle purchase are applied in the fiscal year following the year of purchase.
Notes: 1. This scheme also mandates a yearly 15% (10% for trucks and buses) surcharge on the automobile tax for gasoline and LPG-powered vehicles on the road 13 years or longer, and for diesel vehicles on the road 11 years or longer, since first registration; electric vehicles, fuel cell vehicles, natural gas vehicles, methanol vehicles, gasoline hybrid vehicles, public transport buses and trailers are exempt. 2. In and after 2021, only electric vehicles, fuel cell vehicles, plug-in hybrid vehicles, natural gas vehicles, and clean diesel passenger cars will be eligible for the tax reduction.

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

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

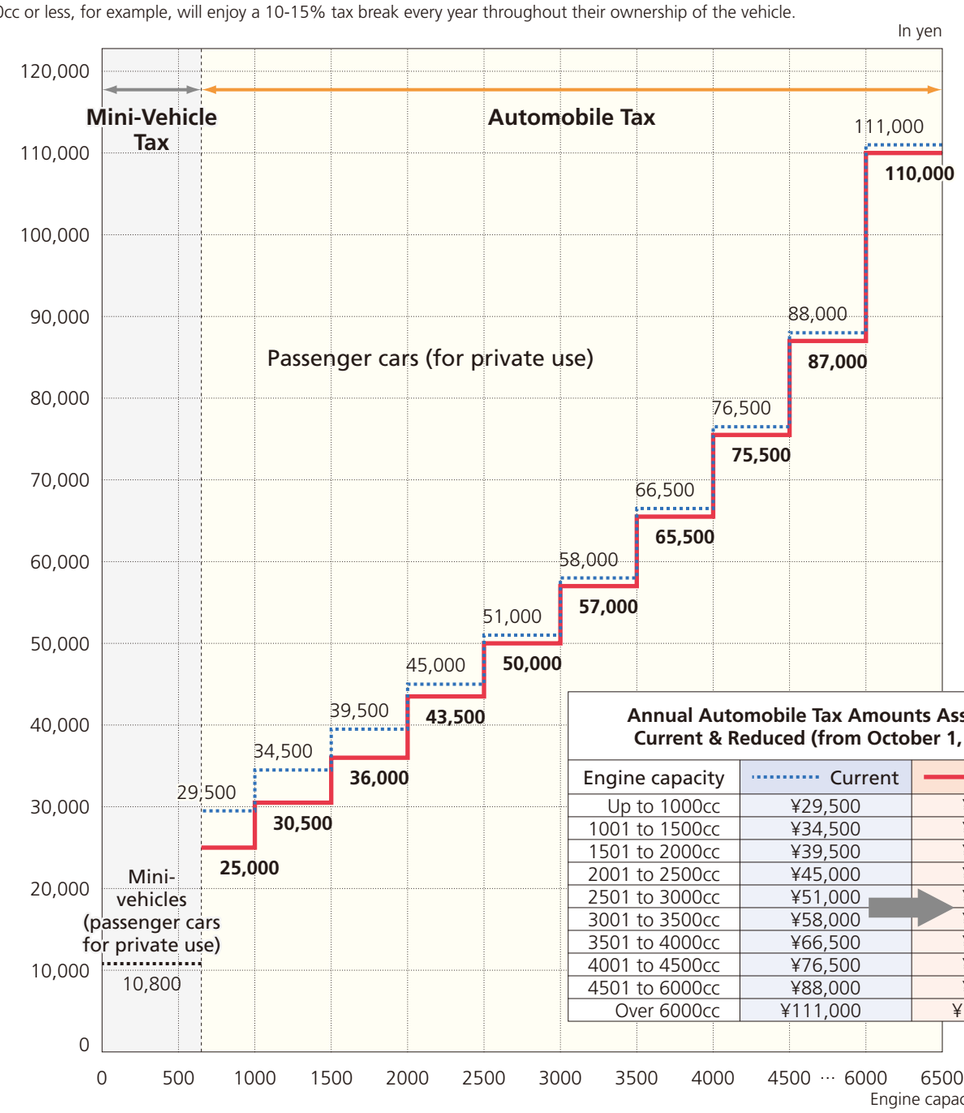
*Applies only to three- or four-wheeled mini-vehicles at the time of new vehicle registration.
(1) With NOx emissions down by 10% from 2009 emission standards, or complying with 2018 emission standards. (2) Reductions effective on initial inspection mandated for new vehicle purchase are applied in the fiscal year following the year of purchase.
Notes: 1. This scheme also mandates a yearly 20% surcharge on the mini-vehicle tax for mini-vehicles on the road 13 years or longer since first registration; electric vehicles, fuel cell vehicles, natural gas vehicles, methanol vehicles, gasoline hybrid vehicles and trailers are exempt. 2. In and after 2021, only electric vehicles, fuel cell vehicles, and natural gas vehicles will be eligible for the tax reduction.

Tax Reform Measures Implemented to Ease the Burden on Motor Vehicle Owners and Help Balance Demand before/after Consumption Tax Hike

In tandem with the scheduled increase in the consumption tax rate to 10% in October 2019, reductions in the automobile tax on private-use passenger cars registered for the first time on or after October 1, 2019 will go into effect, to ease the tax burden on vehicle owners and help balance market demand prior to and following the consumption tax hike. In addition, a provisional reduction of 1% on the automotive environmental performance-based tax (see opposite page) will be accorded to private-use passenger vehicles, including mini- and used vehicles, purchased within one year from October 1, 2019, as a further measure to prevent the demand for automobiles, which are major consumer durables, from spiking before, and consequently plunging after, the increase in the consumption tax.

REDUCTIONS IN THE AUTOMOBILE TAX (permanent tax cuts)

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



Annual Automobile Tax Amounts Assessed, Current & Reduced (from October 1, 2019)

Engine capacity	Current	Reduced
Up to 1000cc	¥29,500	¥25,000
1001 to 1500cc	¥34,500	¥30,500
1501 to 2000cc	¥39,500	¥36,000
2001 to 2500cc	¥45,000	¥43,500
2501 to 3000cc	¥51,000	¥50,000
3001 to 3500cc	¥58,000	¥57,000
3501 to 4000cc	¥66,500	¥65,500
4001 to 4500cc	¥76,500	¥75,500
4501 to 6000cc	¥88,000	¥87,000
Over 6000cc	¥111,000	¥110,000

ABOLITION OF THE ACQUISITION TAX

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

Current acquisition tax rates (applicable through September 30, 2019)

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

→ **To be abolished on October 1, 2019**

IMPLEMENTATION OF TAXATION ON AUTOMOTIVE ENVIRONMENTAL PERFORMANCE

– From October 1, 2019, an automotive environmental performance-based tax will come into effect as an adjunct provision to the automobile tax and the mini-vehicle tax. It will be imposed at the time of vehicle (passenger car, mini-vehicle, heavy-duty vehicle, etc.) purchase and calculated on the basis of the vehicle's environmental (i.e., fuel efficiency, emissions) performance and its purchase price.
– The new tax will apply to both new and used vehicles, with the exception of vehicles purchased for ¥500,000 or less, which are exempted from the tax.
– The fuel efficiency and other environmental performance criteria on the basis of which the tax's varying rates (e.g., from 0% to 3% for passenger vehicles and from 0% to 2% for commercial vehicles and mini-vehicles) have been determined are in line with criteria established in Japan's Energy Conservation Law. Highly fuel-efficient vehicles as well as alternative-energy vehicles are exempted from the tax.
– For vehicles purchased within 12 months from October 1, 2019, a provisional 1% reduction on this tax will be applied.

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

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

*Electric, fuel cell, plug-in hybrid and natural gas vehicles and clean diesel passenger cars
VPP: Vehicle purchase price
Note: Above tax rates will be applied to vehicles registered on or after October 1, 2020, following the expiration of the provisional 1% reduction on these rates.

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

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

*Electric, fuel cell, plug-in hybrid and natural gas vehicles
VPP: Vehicle purchase price

Provisional Automotive Environmental Performance-Based Tax Reduction (in effect from October 1, 2019 through September 30, 2020)

To help balance market demand prior to and following the scheduled increase in the consumption tax in October 2019, a 1% reduction on the automotive environmental performance-based tax will be in effect for private-use passenger vehicles (including mini- and used vehicles) purchased within 12 months from October 1, 2019.

Reductions for Passenger Cars

Basic rate	Reduced rate (2019/10 through 2020/9)
Exempt	Exempt
1%	Exempt
2%	1%
3%	2%

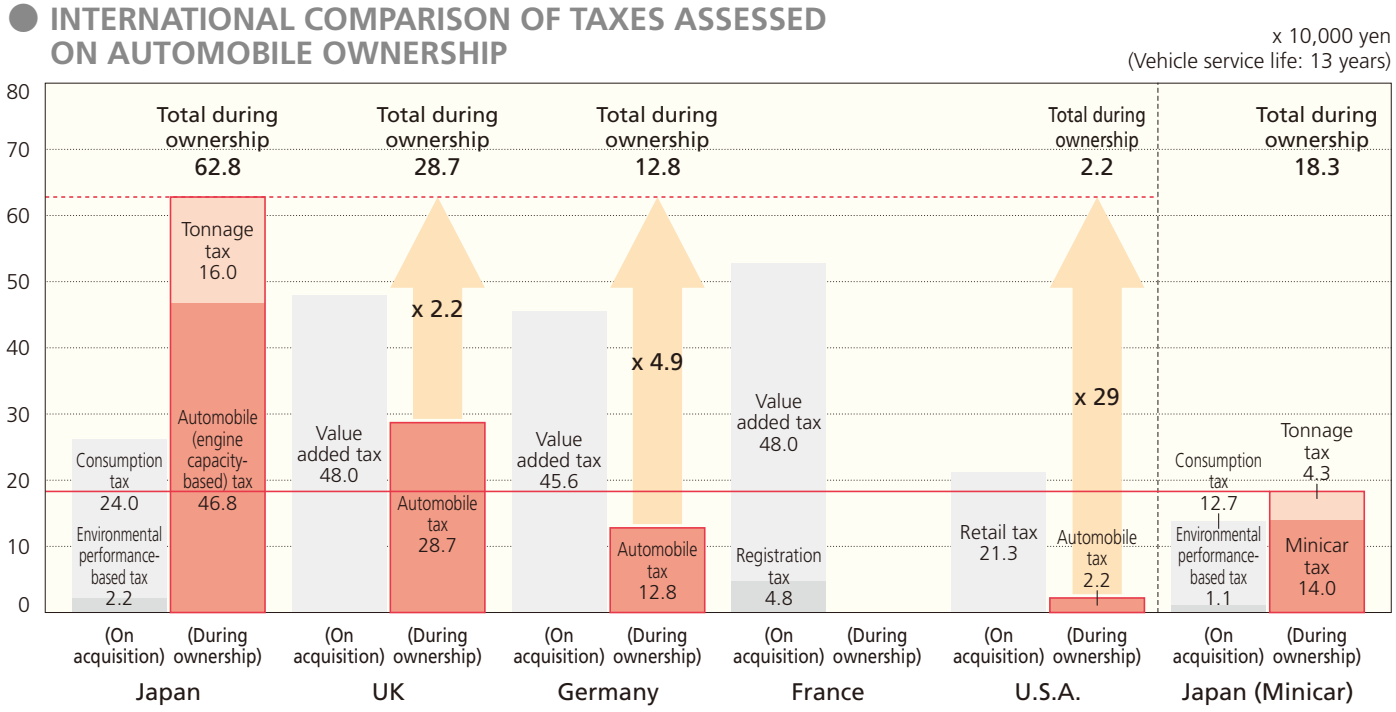
Reductions for Mini-Vehicles

Basic rate	Reduced rate (2019/10 through 2020/9)
Exempt	Exempt
1%	Exempt
2%	1%

Automobile-Related Taxes Are Onerous

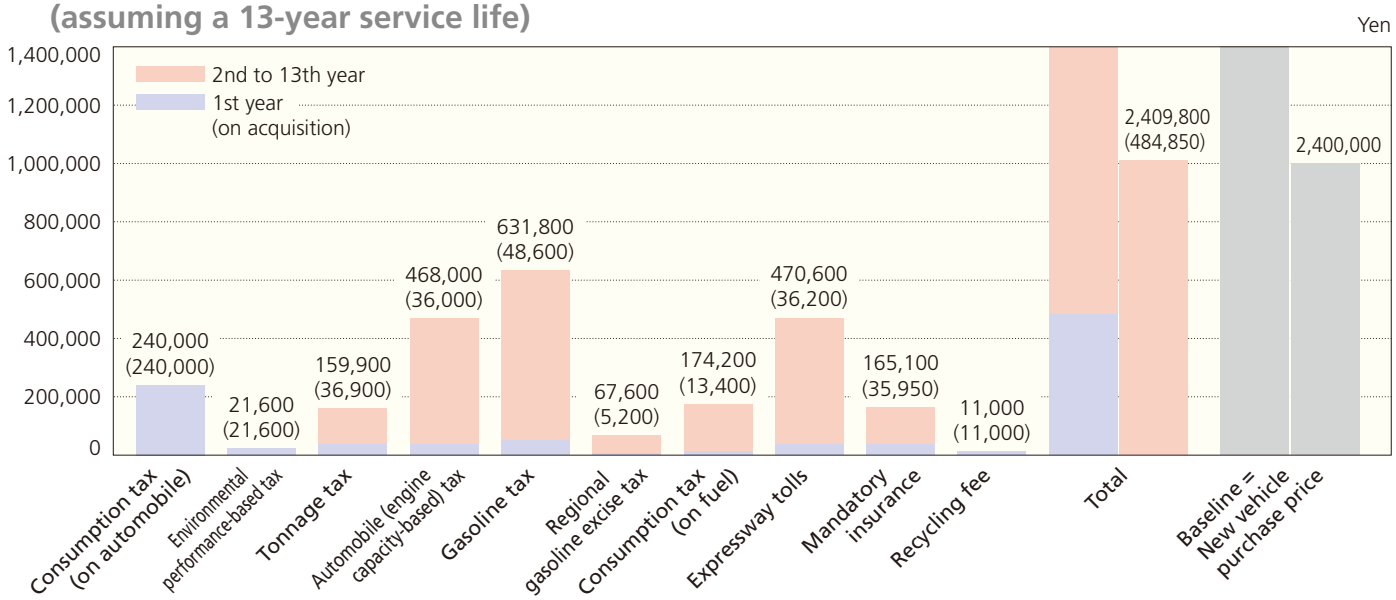
Consider the case of a passenger car costing 2.40 million yen when purchased new and providing 13 years of service to the original owner for private use. During that period, six different categories of taxes (including consumption tax at the time of vehicle purchase and on fuel) will be assessed on the owner/user, amounting to a grand total of roughly 1.8 million yen. In addition to these various taxes, the user will also be required to pay onerous expressway tolls, automobile insurance premiums (mandatory and optional), a recycling fee, periodic inspection fees, and maintenance costs.

INTERNATIONAL COMPARISON OF TAXES ASSESSED ON AUTOMOBILE OWNERSHIP



Assumptions: 1) Engine capacity: 2000cc. 2) GVW≤1.5t. 3) Purchase price: ¥2.40 million (¥1.27 million for a minicar). 4) Fuel consumption (JC08 test cycle-based): 20.5km/L (CO_2 emissions: 113g/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 130, GBP 1 = JPY 150, USD 1 = JPY 112 (averaged April 2018-March 2019).
Notes: 1. Figures here are based on tax rates in effect from October 2019. 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 ¥2.40 million (retail price, excluding consumption tax). 2) GVW≤1.5t. 3) Annual fuel consumption: 1,000 liters. 4) Tonnage tax imposed yearly, but collected only at time of mandatory vehicle inspection. 5) Tax amounts reflect rates in effect from October 1, 2019. 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 October 1, 2019.) 2. Value of expressway tolls was estimated by JAMA based on expressway toll revenue in 2017.
Source: Japan Automobile Manufacturers Association

At This Year's Show, Seeing the Exciting Mobility World of Tomorrow

The 46th edition of the Tokyo Motor Show will be held from October 24 (October 25 for the general public) through November 4, 2019 at Tokyo Big Sight and multiple venues in the Odaiba area (Ariake, Koto-ku), exhibiting passenger cars, commercial vehicles, motorcycles, *carrozzeria,* vehicle bodies, parts, machinery and tools and mobility-related services.

With "Open Future" as its expansive theme, the show will set its sights on what mobility will look like in coming years within the broader context of the living experience of the future. Visitors will be able to see and feel the excitement of the mobility world of tomorrow and its potentialities.

Tokyo Motor Show 2019's venue is Tokyo Waterfront City, including Tokyo Big Sight and the Odaiba area. With the cooperation of the authorities concerned, the Symbol Promenade Park stretching from Tokyo Big Sight's West/South Exhibition Halls and Aomi Exhibition Hall to the Mega Web automobile theme park will serve as an open avenue along which hands-on, interactive exhibits featuring future mobility will take place. The 46th Tokyo Motor Show 2019 will offer programs, events, and activities that can be enjoyed not only by car and motorcycle enthusiasts but by visitors of all ages including young people and families.

● SHOW THEME

OPEN FUTURE

● SHOW LOGO

OPEN FUTURE
TOKYO MOTOR SHOW 2019

The show's striking, colorful logo is a visual representation of its theme, the openness of mobility's potentialities in the future.

82.31 Million People Hold Driver's Licenses

At the end of 2018 there were 82.31 million people, or 44.99 million men and 37.32 million women, holding valid driver's licenses in Japan. The number of driver's licenses held totalled 127.16 million (with one count allotted to each vehicle category covered, whenever a license covers multiple vehicle categories). By license category, Class 2 licenses were held by 2.01 million people, or 1.95 million men and 65,000 women, and Class 1 licenses by 125.15 million people, or 80.21 million men and 44.94 million women.

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

Number of persons

Year	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Men	45,539,419	45,487,010	45,448,263	45,437,260	45,463,791	45,430,245	45,344,259	45,255,994	45,133,771	44,994,702
Women	35,272,526	35,523,236	35,767,003	36,050,586	36,396,221	36,645,978	36,805,749	36,949,917	37,121,424	37,320,222
Total	80,811,945	81,010,246	81,215,266	81,487,846	81,860,012	82,076,223	82,150,008	82,205,911	82,255,195	82,314,924

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

Number of licenses held

Year		2012	2013	2014	2015	2016	2017	2018
Class 2 Licenses	Large motor vehicle	1,026,180	1,007,743	986,518	964,383	942,526	919,242	896,127
	Middle-category motor vehicle	1,042,120	1,002,043	960,304	917,142	873,879	1,055,123	1,001,038
	Ordinary motor vehicle	214,555	220,403	224,823	229,494	234,070	13,318	29,358
	Large special-purpose vehicle	45,463	45,041	44,330	43,605	42,997	42,302	41,560
	Traction vehicle	51,035	50,473	49,665	48,844	48,134	47,325	46,446
	Subtotal	2,379,353	2,325,703	2,265,640	2,203,468	2,141,606	2,077,310	2,014,529
Class 1 Licenses	Large motor vehicle	5,337,727	5,299,480	5,253,880	5,198,185	5,143,533	5,086,713	5,027,351
	Middle-category motor vehicle	72,070,665	71,409,459	70,632,500	69,732,685	68,813,808	67,870,730	66,958,774
	Quasi-middle-category motor vehicle	—	—	—	—	—	11,739,992	11,707,930
	Ordinary motor vehicle	6,749,966	7,936,169	9,113,940	10,297,590	11,473,646	905,528	2,067,271
	Large special-purpose vehicle	2,454,123	2,465,978	2,473,823	2,476,598	2,475,520	2,471,164	2,466,107
	Traction vehicle	1,160,509	1,168,205	1,174,267	1,178,790	1,182,806	1,187,003	1,191,690
	Large two-wheeler	10,938,930	10,703,691	10,430,075	10,112,584	9,799,816	9,466,072	9,126,995
	Ordinary two-wheeler	9,310,786	9,472,692	9,619,692	9,752,541	9,877,616	9,994,091	10,116,497
	Small special-purpose vehicle	503,338	477,296	450,123	422,020	394,952	367,603	341,013
	Motorized bicycle	16,977,729	16,905,848	16,784,700	16,618,061	16,450,534	16,291,972	16,142,848
	Subtotal	125,503,773	125,838,818	125,933,000	125,789,054	125,612,231	125,380,868	125,146,476
Total		127,883,126	128,164,521	128,198,640	127,992,522	127,753,837	127,458,178	127,161,005

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.

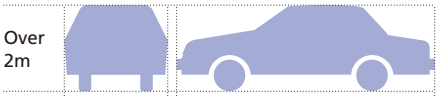
Source for all statistical data on this page: *National Police Agency*

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

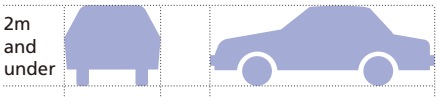
Japan classifies motor vehicles according to the provisions of two basic laws: the Road Vehicles Act and the Road Traffic Act. Road Vehicles Act classifications are used for registration statistics, vehicle inspection, and related maintenance and repair, while Road Traffic Act classifications determine 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, as are specially designed number plates commemorating the Japan-held 2019 Rugby World Cup and the 2020 Tokyo Olympics and Paralympics, 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



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



Mini — 660cc and under in engine capacity

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

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

Large	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
Large	Over 400cc
Ordinary	51cc to 400cc
Motorized bicycle	50cc and under

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

SIGNIFICANCE OF VEHICLE REGISTRATION DATA & NUMBER PLATE TYPES

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

Usage Designations	
Ordinary and large motor vehicles	
Private use	さすせそたちつてとなにぬねのはひふほまみむめもやゆらりるろ
Commercial business use	あいうえかきくけこを
Rental vehicle	われ
Foreign military vehicle	EHKMTYよ
Mini-vehicles	
Private use	あいうえかきくけこさすせそたちつてとなにぬねのはひふほまみむめもやゆよらるろを
Commercial business use	りれ
Rental vehicle	わ
Foreign military vehicle	AB
Hiragana character indicates vehicle usage category: private, commercial business, rental or foreign military vehicle (private or official).	

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

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

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

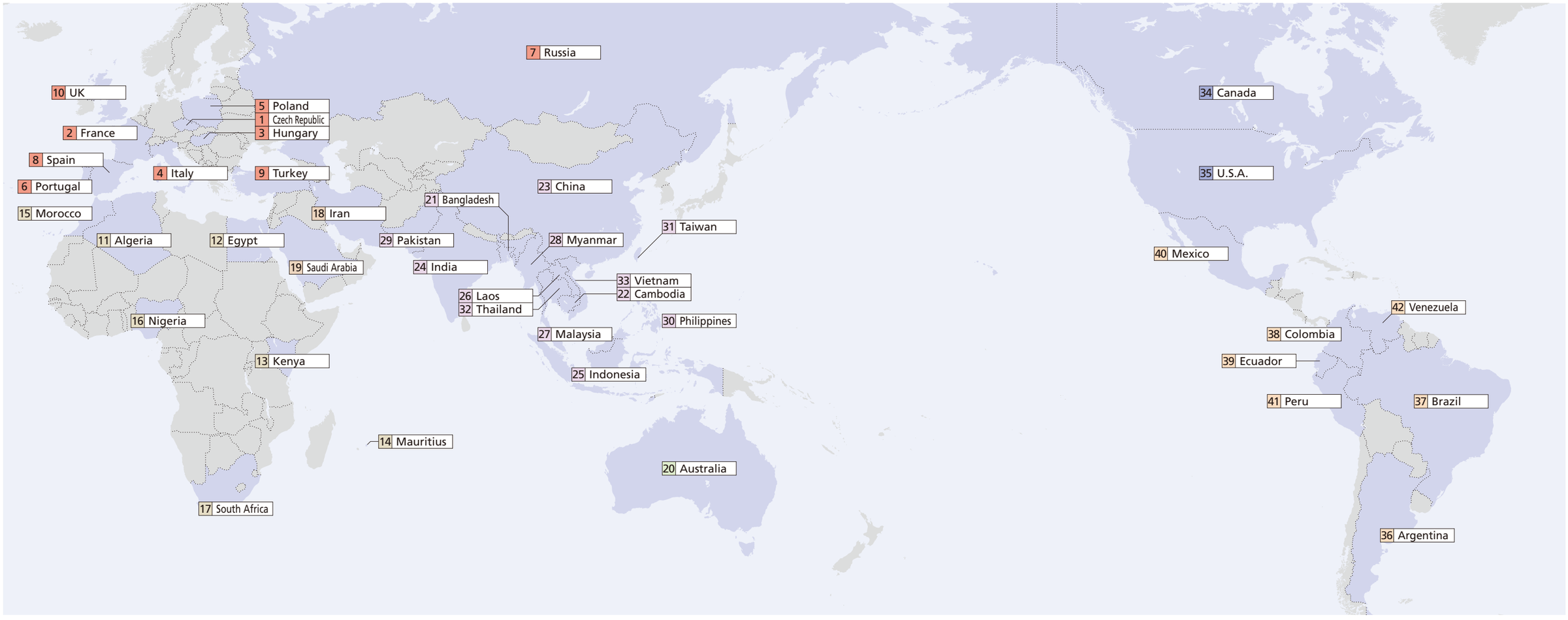
Designated Number Categories Indicating Vehicle Type	
Ordinary trucks	1, 10-19, 100-199, 10A-19Z, 1A0-1Z9, 1AA-1ZZ
Ordinary buses	2, 20-29, 200-299, 20A-29Z, 2A0-2Z9, 2AA-2ZZ
Ordinary passenger cars	3, 30-39, 300-399, 30A-39Z, 3A0-3Z9, 3AA-3ZZ
Three- or four-wheeled small trucks	4, 40-49, 400-499, 40A-49Z, 4A0-4Z9, 4AA-4ZZ 6, 60-69, 600-699, 60A-69Z, 6A0-6Z9, 6AA-6ZZ
Three- or four-wheeled small passenger cars and small buses	5, 50-59, 500-599, 50A-59Z, 5A0-5Z9, 5AA-5ZZ 7, 70-79, 700-799, 70A-79Z, 7A0-7Z9, 7AA-7ZZ
Special-purpose vehicles	8, 80-89, 800-899, 80A-89Z, 8A0-8Z9, 8AA-8ZZ
Large special-purpose vehicles	9, 90-99, 900-999, 90A-99Z, 9A0-9Z9, 9AA-9ZZ
Large special-purpose vehicles used as construction machinery	0, 00-09, 000-099, 00A-09Z, 0A0-0Z9, 0AA-0ZZ

Source: Ministry of Land, Infrastructure, Transport and Tourism

Global Manufacturing Operations Expand Their Range

Japanese automobile manufacturers have continued to develop local production operations, whether as wholly-owned subsidiaries or as joint ventures, in the United States, Europe, Southeast Asia, China and, more recently, Russia and other countries with emerging markets. These operations contribute to the strengthening of local economies through employment creation, local parts purchasing and, in many cases, export revenue for the host countries. Locally-produced automobile parts such as engines and transmissions, as well as finished vehicles of some models, are exported to Japan and other destinations.

GEOGRAPHICAL DISTRIBUTION OF JAPANESE AUTOMAKERS' OVERSEAS PRODUCTION BASES



JAPANESE AUTOMAKERS' OVERSEAS PRODUCTION BASES: Number of Plants by Country & 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
Poland	5	-	-	-	2
Portugal	6	2	-	-	-
Russia	7	6	-	-	-
Spain	8	1	-	-	1
Turkey	9	4	-	-	-
UK	10	3	-	-	1
Europe Total		19	2	-	5

Country/Territory	Country No. (see map)	Motor Vehicles (incl. parts)	Motor-cycles (incl. parts)	Motor Vehicles & Motorcycles (incl. parts)	Parts Only
Africa					
Algeria	11	2	-	-	-
Egypt	12	5	-	-	-
Kenya	13	3	1	-	-
Mauritius	14	1	-	-	-
Morocco	15	1	-	-	-
Nigeria	16	2	2	-	-
South Africa	17	5	-	-	-
Africa Total		19	3	-	-
Middle East					
Iran	18	1	-	-	-
Saudi Arabia	19	1	-	-	-
Middle East Total		2	-	-	-
Oceania					
Australia	20	-	-	-	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	21	2	2	-	-
Cambodia	22	-	2	-	-
China	23	19	8	-	19
India	24	12	7	-	2
Indonesia	25	15	7	1	15
Laos	26	-	1	-	-
Malaysia	27	12	2	-	4
Myanmar	28	3	-	-	-
Pakistan	29	5	3	1	-
Philippines	30	6	4	-	4
Taiwan	31	8	2	-	1
Thailand	32	16	4	-	9
Vietnam	33	8	3	2	2
Asia Total		106	45	4	56

Country/Territory	Country No. (see map)	Motor Vehicles (incl. parts)	Motor-cycles (incl. parts)	Motor Vehicles & Motorcycles (incl. parts)	Parts Only
North America					
Canada	34	5	-	-	2
U.S.A.	35	14	1	-	12
North America Total		19	1	-	14
Latin America				-	
Argentina	36	1	2	1	-
Brazil	37	7	4	-	4
Colombia	38	1	2	-	-
Ecuador	39	2	-	-	-
Mexico	40	8	1	1	-
Peru	41	-	1	-	-
Venezuela	42	1	-	-	-
Latin America Total		20	10	2	4
World Total		185	61	6	80

Source: Japan Automobile Manufacturers Association

Japanese Automakers' Overseas Production Reaches 19.97 Million Units

The global operations of Japanese automobile manufacturers continue to grow, focusing on on-site manufacturing to meet local needs. Whether as independent operations, joint ventures or technical tie-ups, local manufacturing activities are conducted in numerous countries around the world (see pages 48-49). In 2018 Japanese automakers' overseas production totalled 19.97 million units, with Asia and Africa seeing the most significant increases.

OVERSEAS PRODUCTION BY JAPANESE AUTOMOBILE MANUFACTURERS

In vehicle units

Year	Asia	Middle East	Europe	EU	North America	U.S.A.	Latin America	Africa	Oceania	Total
1985	208,589	—	44,658	43,175	296,569	296,569	90,252	99,500	151,574	891,142
1986	282,912	—	75,163	73,903	426,087	425,644	87,115	119,000	133,109	1,123,386
1987	355,758	—	102,943	100,794	608,446	592,761	104,925	134,000	127,003	1,433,075
1988	456,489	—	132,129	130,326	723,396	672,766	125,531	145,000	152,334	1,734,879
1989	597,402	—	205,005	203,215	1,040,868	932,242	144,811	184,500	166,541	2,339,127
1990	952,390	—	226,613	223,164	1,570,114	1,298,878	160,654	186,000	169,169	3,264,940
1991	1,035,715	—	285,994	282,278	1,684,964	1,378,907	169,001	172,000	134,051	3,481,725
1992	1,120,430	—	358,601	351,296	1,853,097	1,547,361	195,161	167,500	109,276	3,804,065
1993	1,315,346	—	496,574	472,744	2,030,478	1,691,239	211,802	179,000	106,754	4,339,954
1994	1,553,585	—	502,332	477,728	2,346,619	1,982,209	197,325	168,000	128,213	4,896,074
1995	1,882,850	—	641,573	575,852	2,595,436	2,215,657	110,660	226,000	102,961	5,559,480
1996	1,950,621	—	738,378	650,990	2,641,451	2,275,525	140,031	195,674	118,097	5,784,252
1997	2,003,286	—	814,689	714,699	2,664,588	2,290,685	190,596	182,218	136,107	5,991,484
1998	1,215,202	5,688	920,985	814,847	2,674,299	2,270,516	260,131	144,181	150,685	5,371,171
1999	1,547,671	3,493	929,303	835,582	2,797,175	2,311,163	246,710	130,216	125,575	5,780,143
2000	1,673,740	4,258	953,170	837,679	2,991,924	2,480,691	387,732	146,435	130,933	6,288,192
2001	1,872,521	5,660	1,032,004	939,034	3,061,612	2,451,496	407,887	162,825	137,084	6,679,593
2002	2,380,621	6,000	1,153,059	1,015,748	3,375,453	2,720,449	445,862	155,973	135,498	7,652,466
2003	3,007,348	5,820	1,338,476	1,245,469	3,487,012	2,821,723	457,467	162,969	148,471	8,607,563
2004	3,638,978	10,800	1,454,903	1,296,516	3,840,744	3,143,603	534,863	191,537	125,726	9,797,551
2005	3,964,209	10,500	1,545,355	1,369,556	4,080,713	3,383,277	645,074	225,725	134,581	10,606,157
2006	4,129,856	11,400	1,702,836	1,509,402	4,001,639	3,281,073	745,827	259,050	121,635	10,972,243
2007	4,523,751	3,342	1,976,407	1,789,875	4,049,068	3,324,326	895,099	252,332	159,710	11,859,709
2008	4,877,074	0	1,876,109	1,693,151	3,576,246	2,893,466	920,738	257,646	143,741	11,651,554
2009	5,145,418	0	1,228,294	1,136,145	2,687,527	2,108,161	790,794	168,651	96,836	10,117,520
2010	7,127,042	0	1,356,126	1,250,226	3,390,095	2,653,231	982,342	206,476	119,473	13,181,554
2011	7,547,259	0	1,410,628	1,302,277	3,068,979	2,422,152	1,029,511	233,709	93,675	13,383,761
2012	8,500,993	0	1,484,110	1,383,583	4,253,869	3,324,703	1,234,584	248,711	101,381	15,823,648
2013	9,056,388	0	1,537,025	1,379,733	4,540,685	3,627,226	1,284,187	232,191	106,278	16,756,754
2014	9,112,629	596	1,654,208	1,382,052	4,785,769	3,813,351	1,591,099	241,841	90,125	17,476,267
2015	9,472,178	437	1,668,878	1,401,521	4,823,222	3,847,517	1,820,525	218,020	91,616	18,094,876
2016	10,091,593	89	1,757,776	1,487,994	4,989,360	3,976,482	1,859,685	190,724	90,240	18,979,467
2017	10,870,888	0	1,940,778	1,511,800	4,767,063	3,765,364	1,903,466	198,625	60,942	19,741,762
2018	11,391,185	0	1,856,511	1,415,747	4,606,948	3,676,823	1,894,346	216,969	0	16,965,959

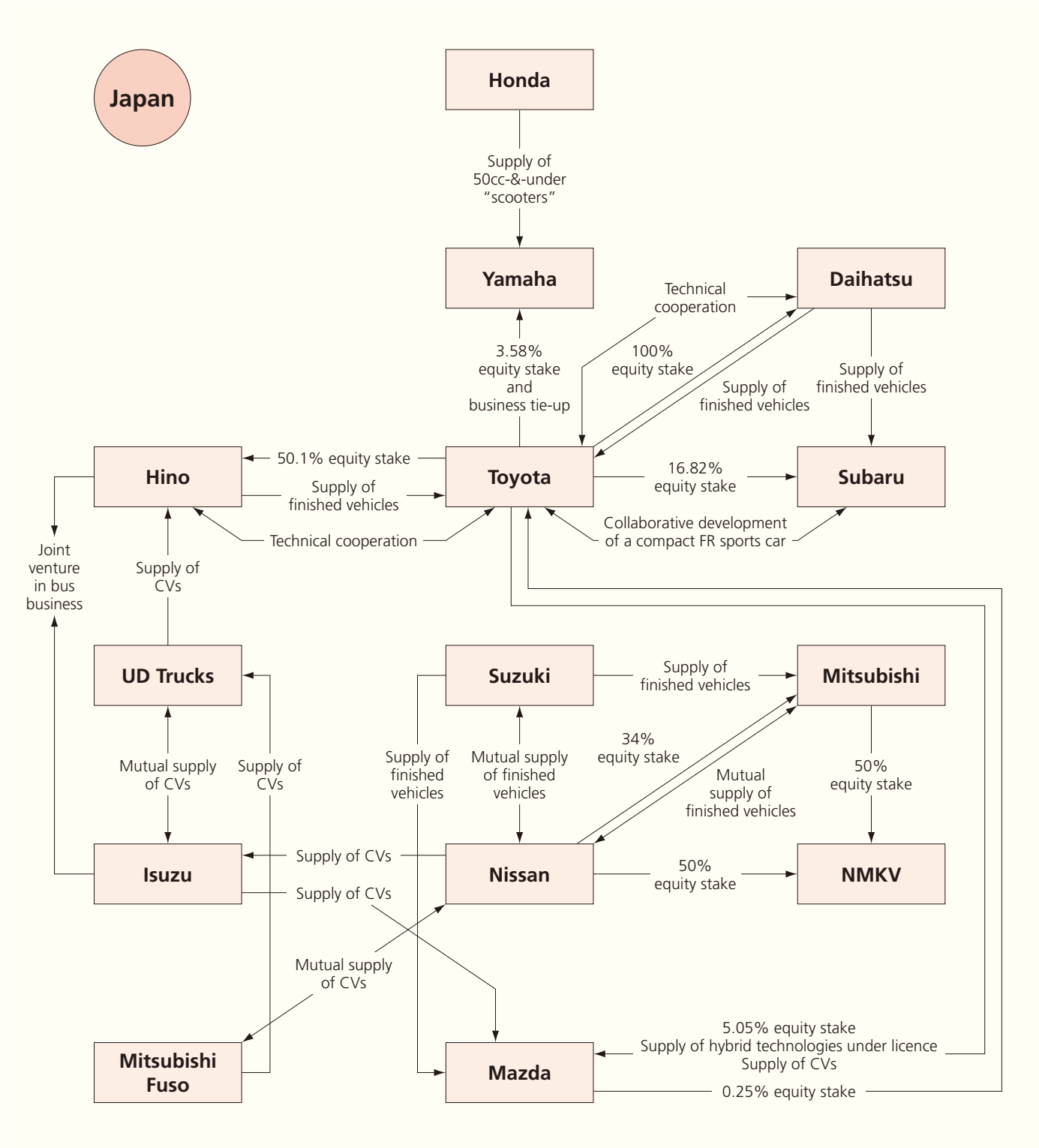
Notes: 1. Data in principle is for Japanese-brand vehicles only. 2. Until 1997, data was based on statistics supplied by the national automobile trade associations of respective countries. 3. Mexico is included in Latin America and Turkey in Europe. 4. Data excludes vehicles produced with technical assistance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

Source: Japan Automobile Manufacturers Association

Japanese Automakers Forge Extensive International Alliances

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

At March 31, 2019

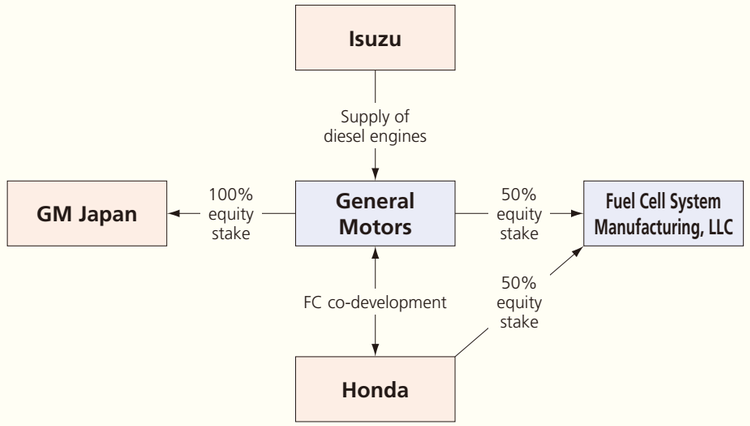


Note: In principle, the tie-ups shown above cover only technical cooperation related to motor vehicle production and exclude sales tie-ups.

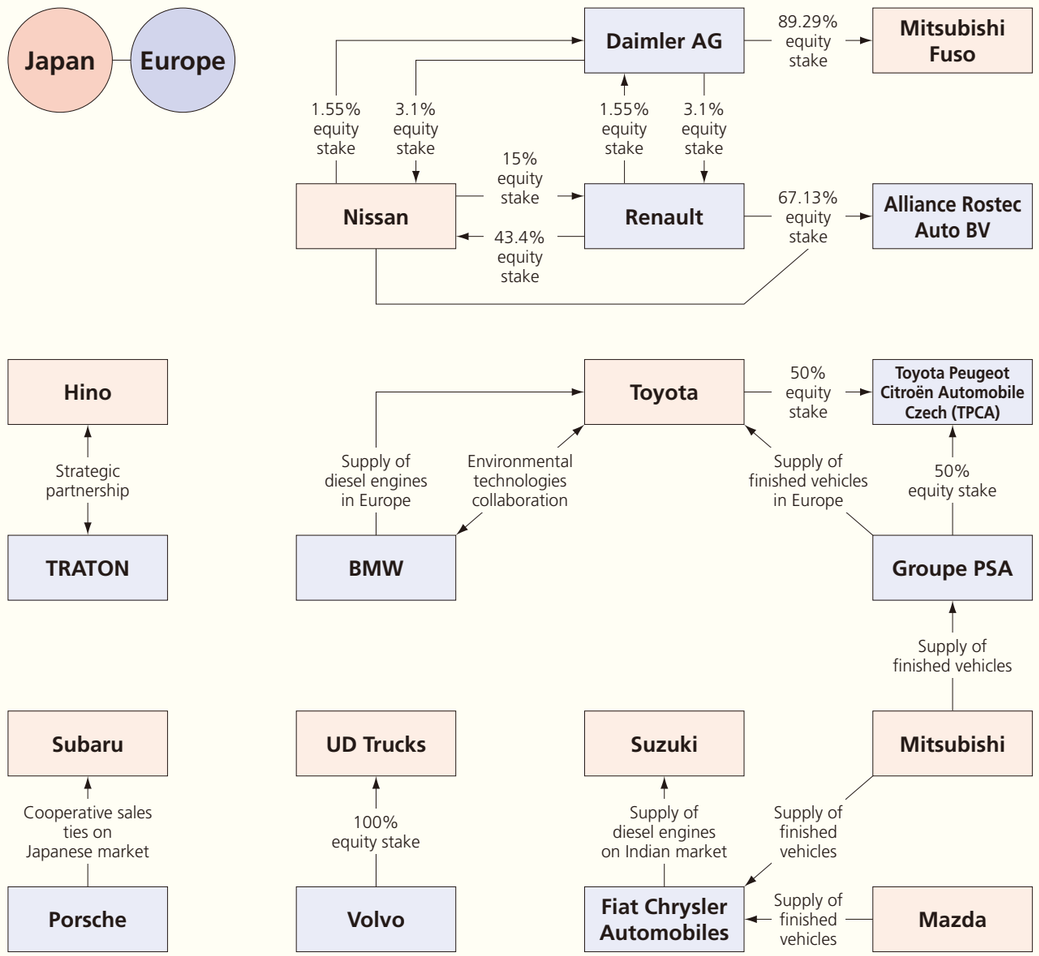
Source: Japan Automobile Manufacturers Association

At March 31, 2019

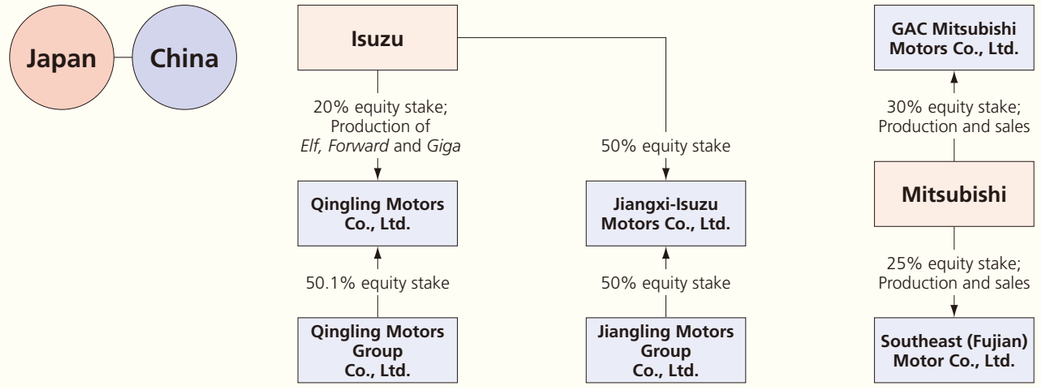
Japan – U.S.A.

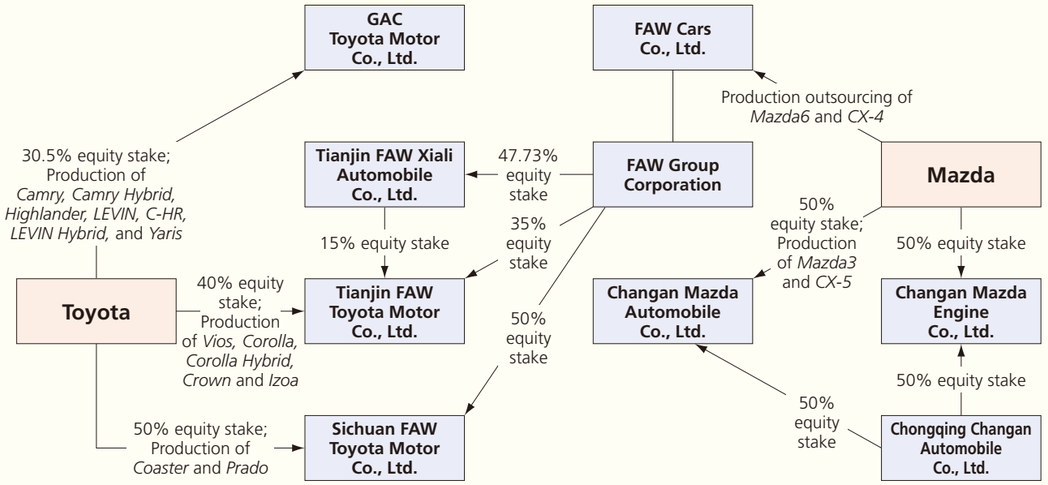


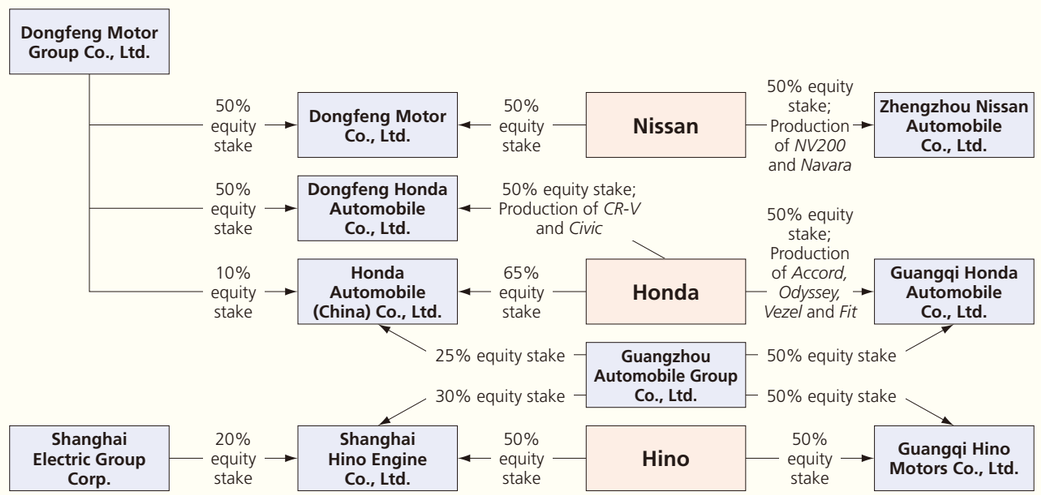
Japan – Europe



Japan – China





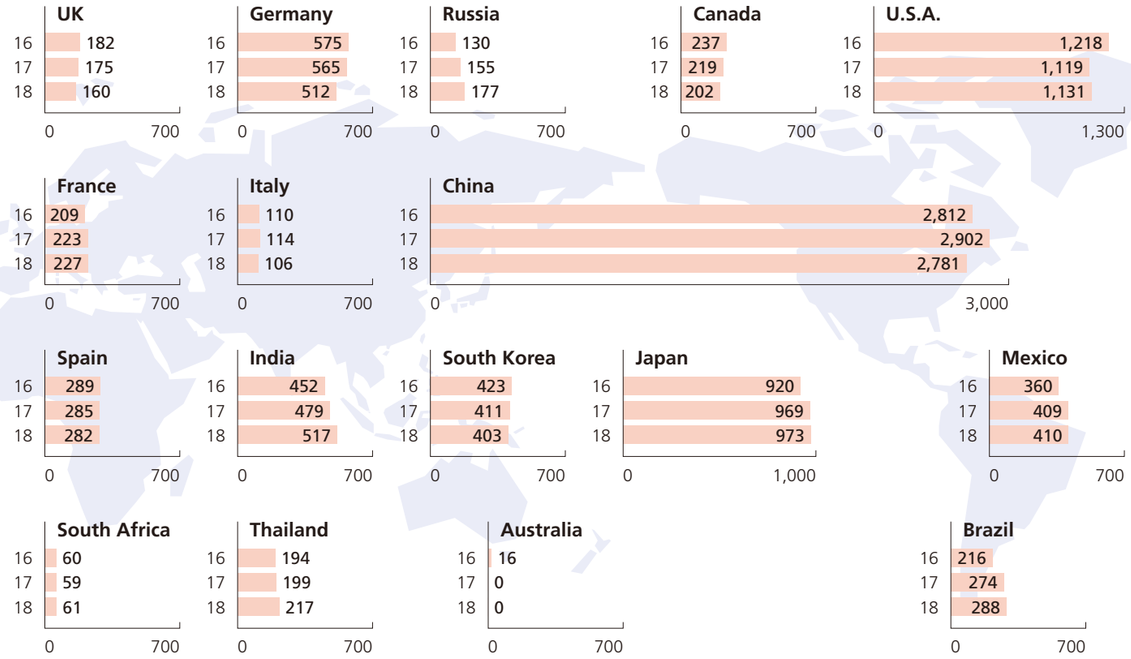


Motor Vehicle Production Worldwide Totals 95.7 Million Units

In 2018 worldwide motor vehicle production (excluding motorcycles) slipped 1.1% from the previous year to a total of 95.71 million units. By region, production increased in Latin America (up 1.8% to 7.46 million units) and Africa (up 12.0% to 1.12 million units).

MOTOR VEHICLE PRODUCTION EXCLUDING MOTORCYCLES (MAJOR PRODUCING COUNTRIES)

x 10,000 units



GLOBAL MOTORCYCLE PRODUCTION (BY COUNTRY/TERRITORY)

In vehicle units

Country/Territory	2015			2016			2017		
	Mopeds	Motorcycles	Total	Mopeds	Motorcycles	Total	Mopeds	Motorcycles	Total
Austria	—	—	—	—	—	—	—	—	—
Czech Republic	16	1,711	1,727	9	1,219	1,228	—	—	1,331
France	—	—	—	—	—	—	—	—	—
Germany	—	—	—	—	—	—	—	—	—
Italy	60,314	228,425	288,739	60,699	240,914	302,323	74,996	249,356	325,885
Spain	—	—	—	—	—	—	—	—	—
UK	—	—	—	—	—	—	—	—	—
Brazil	—	1,262,708	1,262,708	0	887,653	887,653	0	882,876	882,876
China	—	16,617,298	18,832,191	—	14,734,442	16,820,802	—	15,093,566	17,145,746
India	—	—	18,830,227	—	—	19,933,739	—	—	23,147,057
Japan	0	522,394	522,394	0	560,536	560,536	0	646,983	646,983
Malaysia	—	—	382,218	—	—	395,938	—	—	440,673
Pakistan	—	—	1,255,770	—	—	1,496,907	—	—	1,781,856
Philippines	—	—	806,594	—	—	1,040,626	—	—	1,173,883
Taiwan	—	—	1,118,848	—	—	1,217,442	—	—	1,237,080
Thailand	—	—	1,807,325	—	—	1,820,358	—	—	2,055,193

Note: "—" means data is not available at the end of March 2019.

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

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

In vehicle units

Country/Region/Territory	2016			2017			2018		
	Passenger Cars	Trucks & Buses	Total	Passenger Cars	Trucks & Buses	Total	Passenger Cars	Trucks & Buses	Total
Austria	91,300	18,430	109,730	78,000	19,200	97,200	144,500	20,400	164,900
Belgium	354,003	45,424	399,427	332,979	44,023	377,002	265,958	42,535	308,493
Finland	48,000	0	48,000	108,839	0	108,839	112,104	0	112,104
France	1,636,000	454,279	2,090,279	1,754,200	471,000	2,225,700	1,763,300	506,000	2,269,600
Germany	5,746,808	0	5,746,808	5,645,584	0	5,645,584	5,120,409	0	5,120,409
Italy	712,971	390,334	1,103,305	742,642	399,568	1,142,210	670,932	389,136	1,060,068
Netherlands	87,609	2,280	89,889	0	0	0	0	0	0
Portugal	99,200	43,896	143,096	126,426	49,118	175,544	234,151	60,215	294,366
Spain	2,354,117	531,805	2,885,922	2,291,474	556,843	2,848,317	2,267,396	552,169	2,819,565
Sweden	205,374	0	205,374	0	0	0	0	0	0
UK	1,722,698	93,924	1,816,622	1,671,166	78,219	1,749,385	1,519,440	84,888	1,604,328
Czech Republic	1,344,182	5,714	1,349,896	1,305,865	0	1,305,865	1,345,041	0	1,345,041
Hungary	523,000	3,500	526,500	418,435	0	418,435	430,988	0	430,988
Poland	554,600	127,234	681,834	514,700	175,083	689,783	451,600	208,046	659,646
Romania	358,861	445	359,306	363,654	34	363,688	476,769	0	476,769
Slovakia	1,040,000	0	1,040,000	1,032,445	0	1,032,445	1,090,000	0	1,090,000
Slovenia	133,702	0	133,702	189,852	0	189,852	209,378	0	209,378
Double Counts Portugal/World	0	-8,505	-8,505	0	-11,643	-11,643	0	-10,347	-10,347
Double Counts Eastern Europe/World	-125,200	0	-125,200	0	0	0	0	0	0
European Union (EU27*)	16,887,225	1,708,760	18,595,985	16,576,261	1,781,445	18,358,206	16,101,966	1,853,042	17,955,308
Turkey	950,888	535,039	1,485,927	1,142,906	552,825	1,695,731	1,026,461	523,689	1,550,150
Serbia	79,360	960	80,320	78,950	174	79,124	56,303	146	56,449
Russia	1,124,310	179,234	1,303,544	1,349,017	202,892	1,551,909	1,563,572	204,102	1,767,674
Azerbaijan	0	247	247	0	0	0	0	0	0
Belarus	10,090	7,180	17,270	3,580	9,848	13,428	10,941	12,294	23,235
Kazakhstan	8,397	2,254	10,651	16,789	2,282	19,071	30,016	1,529	31,545
Ukraine	4,340	924	5,264	7,296	1,290	8,586	5,660	963	6,623
Uzbekistan	88,152	0	88,152	140,247	0	140,247	220,667	0	220,667
Double Counts CIS/World	-101,090	0	-101,090	-116,000	0	-116,000	-139,000	0	-139,000
CIS	1,134,199	189,839	1,324,038	1,400,929	216,312	1,617,241	1,691,856	218,888	1,910,744
Europe	19,051,672	2,434,598	21,486,270	19,083,046	2,550,703	21,634,302	18,737,586	2,595,765	21,333,651
Canada	803,230	1,567,426	2,370,656	751,048	1,442,955	2,194,003	655,896	1,364,944	2,020,840
U.S.A.	3,916,584	8,263,717	12,180,301	3,033,216	8,156,769	11,189,985	2,795,971	8,518,734	11,314,705
North America	4,719,814	9,831,143	14,550,957	3,784,264	9,599,724	13,383,988	3,451,867	9,883,678	13,335,545
Mexico	1,993,178	1,607,187	3,600,365	1,906,899	2,187,933	4,094,832	1,575,808	2,524,717	4,100,525
Argentina	241,315	231,461	472,776	203,694	269,714	473,408	208,573	258,076	466,649
Brazil	1,778,464	377,892	2,156,356	2,307,443	429,359	2,736,802	2,386,758	493,051	2,879,809
Colombia	77,946	1,090	79,036	74,000	3,000	77,000	69,000	3,800	72,800
Ecuador	0	2,700	2,700	0	0	0	0	0	0
Venezuela	849	2,001	2,850	0	0	0	0	0	0
Double Counts South America/World	-32,790	-10,580	-43,370	-40,000	-12,000	-52,000	-42,000	-13,000	-55,000
Latin America	4,058,962	2,211,751	6,270,713	4,452,036	2,878,006	7,330,042	4,198,139	3,266,644	7,464,783
North and Latin America	8,778,776	12,042,894	20,821,670	8,236,300	12,477,730	20,714,030	7,650,006	13,150,322	20,800,328
Australia	149,000	12,294	161,294	0	0	0	0	0	0
Bangladesh	580	0	580	0	0	0	0	0	0
China	24,420,744	3,698,050	28,118,794	24,806,687	4,208,747	29,015,434	23,529,423	4,279,773	27,809,196
India	3,707,348	811,993	4,519,341	3,961,327	830,904	4,792,231	4,064,774	1,109,871	5,174,645
Indonesia	968,476	209,321	1,177,797	982,337	235,769	1,218,106	1,055,774	287,940	1,343,714
Iran	1,188,072	94,100	1,282,172	1,418,550	837,849	1,515,396	1,027,313	504,710	1,095,526
Japan	7,873,886	1,330,816	9,204,702	8,347,836	1,342,838	9,690,674	8,359,286	1,257,111	9,729,594
Malaysia	503,771	41,562	545,333	460,000	40,700	501,700	522,400	41,800	565,000
Pakistan	178,718	35,932	214,650	204,500	46,300	250,800	223,500	47,300	269,700
Philippines	45,853	71,015	116,868	0	0	0	0	0	0
South Korea	3,859,991	368,518	4,228,509	3,735,399	379,514	4,114,913	3,661,730	367,104	4,028,834
Taiwan	251,087	58,435	309,522	230,356	61,207	291,563	190,052	63,189	253,241
Thailand	805,033	1,139,384	1,944,417	818,440	1,170,383	1,988,823	877,015	1,290,679	2,167,694
Vietnam	145,571	90,590	236,161	145,571	90,590	236,571	146,000	91,000	237,000
Double Counts Asia/World	-213,830	0	-213,830	-221,000	0	-221,000	-224,000	0	-224,000
Asia-Oceania	43,884,300	7,962,010	51,846,310	44,892,003	9,244,801	53,395,211	43,433,267	9,340,477	52,450,144
Algeria	42,008	0	42,008	60,606	0	60,606	70,597	0	70,597
Egypt	10,930	25,300	36,230	9,500	26,500	36,000	18,500	50,507	69,007
Morocco	313,868	31,238	345,106	307,318	34,484	341,802	368,601	33,484	402,085
South Africa	335,539	263,465	599,004	321,358	268,593	589,951	321,097	289,757	610,854
Tunisia	0	1,940	1,940	0	1,900	1,900	0	1,700	1,700
Double Counts South Africa/World	-28,660	-92,060	-120,720	-27,000	0	-27,000	-31,007	0	-31,007
Africa	673,685	229,883	903,568	671,782	331,477	1,003,259	747,788	375,448	1,123,236
Grand Totals	72,388,433	22,669,385	95,057,818	72,883,131	24,604,711	96,746,802	70,568,647	25,462,012	95,707,359

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

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

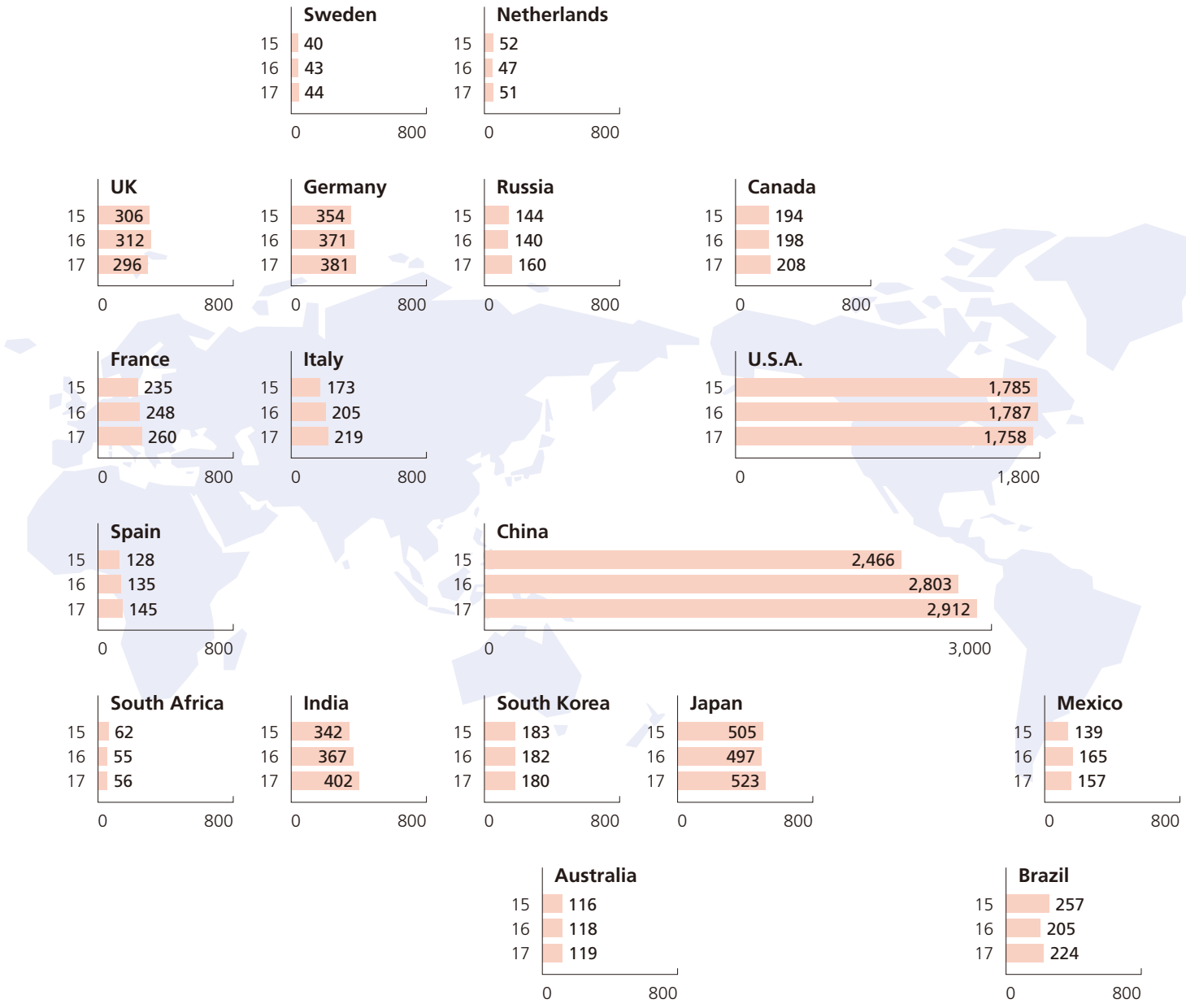
A Total of 96.8 Million New Motor Vehicles Sold Globally

In 2017 new motor vehicle registrations (excluding motorcycles) increased 3.1% over the previous year to a global total of 96.80 million units. Vehicle sales rose in Russia (up 14.1% to 1.60 million units), India (up 9.5% to 4.02 million units), and Brazil (up 9.2% to 2.24 million units).

To our readers: Worldwide new registrations data for 2018 was not available at this publication's press time.

NEW REGISTRATIONS OF MOTOR VEHICLES EXCLUDING MOTORCYCLES (SELECTED COUNTRIES)

x 10,000 units



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

In vehicle units

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

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

More than 1.37 Billion Motor Vehicles in Use Worldwide

There were over 1.37 billion motor vehicles (excluding motorcycles) in use worldwide in 2017, equivalent to 182 motor vehicles per 1,000 inhabitants or one vehicle for every 5.5 persons. Motorcycle density in recent years has been particularly high in Indonesia, with one motorcycle in use for every two persons; in Malaysia and Thailand, with one in use for every three persons; in Greece, with one in use for every six persons; and in Italy, with one in use for every seven persons. In Japan, one motorcycle is in use for every 12 persons.

MOTOR VEHICLE DENSITY: INTERNATIONAL COMPARISONS (at end of 2017)

In vehicle units

x 1 person

Country	No. of Motor Vehicles per 1,000 Inhabitants (Total Motor Vehicles / Passenger Cars)	No. of Persons per Motor Vehicle (No. of Persons per Passenger Car)
U.S.A.	851 / 383	1.2 (2.6)
Australia	747 / 583	1.3 (1.7)
Italy	734 / 648	1.4 (1.5)
Canada	652 / 620	1.5 (1.6)
Japan	612 / 485	1.6 (2.1)
Austria	619 / 563	1.6 (1.8)
Germany	610 / 566	1.6 (1.8)
Spain	617 / 509	1.6 (2.0)
France	606 / 502	1.7 (2.0)
Switzerland	606 / 538	1.7 (1.9)
UK	599 / 524	1.7 (1.9)
Belgium	578 / 503	1.7 (2.0)
World Average	182 / 135	5.5 (7.4)

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

MOTOR VEHICLES IN USE WORLDWIDE (at end of 2017)

In vehicle units

Country	Passenger Cars	Commercial Vehicles	Total
Germany	46,474,594	3,617,895	50,092,489
Italy	38,520,321	5,077,594	43,597,915
France	32,614,400	6,770,200	39,384,600
UK	34,686,328	4,989,234	39,675,562
Spain	23,623,627	5,020,085	28,643,712
Netherlands	8,594,600	1,121,556	9,716,156
Belgium	5,735,280	852,405	6,587,685
Austria	4,898,578	484,734	5,383,312
Sweden	4,845,609	661,723	5,507,332
Poland	22,573,400	3,909,300	26,482,700
Switzerland	4,570,823	576,021	5,146,844
Turkey	12,035,978	5,241,945	17,277,923
Russia	46,747,100	6,213,700	52,960,800
U.S.A.	124,141,000	151,878,000	276,019,000
Canada	22,678,328	1,167,819	23,846,147
Mexico	30,089,169	11,221,858	41,311,027
Argentina	10,689,885	3,419,019	14,108,904
Brazil	36,189,608	7,407,750	43,597,358
Japan	61,803,118	16,274,751	78,077,869
China	184,644,000	30,956,000	215,600,000
South Korea	18,034,540	4,493,755	22,528,295
India	35,890,300	10,629,600	46,519,900
Thailand	9,260,152	7,686,809	16,946,961
Indonesia	14,160,100	9,458,000	23,618,100
Australia	14,275,000	4,038,000	18,313,000
South Africa	7,810,200	5,578,300	13,388,500
Other	160,057,169	49,017,891	209,075,060
Grand Totals	1,015,643,207	357,763,944	1,373,407,151

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

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

x 1 person

2017	Indonesia	2
2014	Malaysia	3
2015	Thailand	3
2014	Greece	6
2017	Italy	7
2014	Spain	9
2014	Switzerland	10
2014	Austria	11
2017	Japan	12
2017	Germany	13
2014	Netherlands	14
2017	China	19

Note: Data for Japan is as at March 31.

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

MOTORCYCLES IN USE WORLDWIDE

In vehicle units

Year	Country/Territory	Total
2017	Italy	8,639,911
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
2017	Germany	6,119,492
2014	Greece	1,802,929
2014	Malaysia	11,734,527
2015	Thailand	20,541,724
2017	Taiwan	13,755,582
2017	Indonesia	111,470,878
2017	China	74,254,839
2017	Japan	10,955,960
2017	Philippines	6,174,345

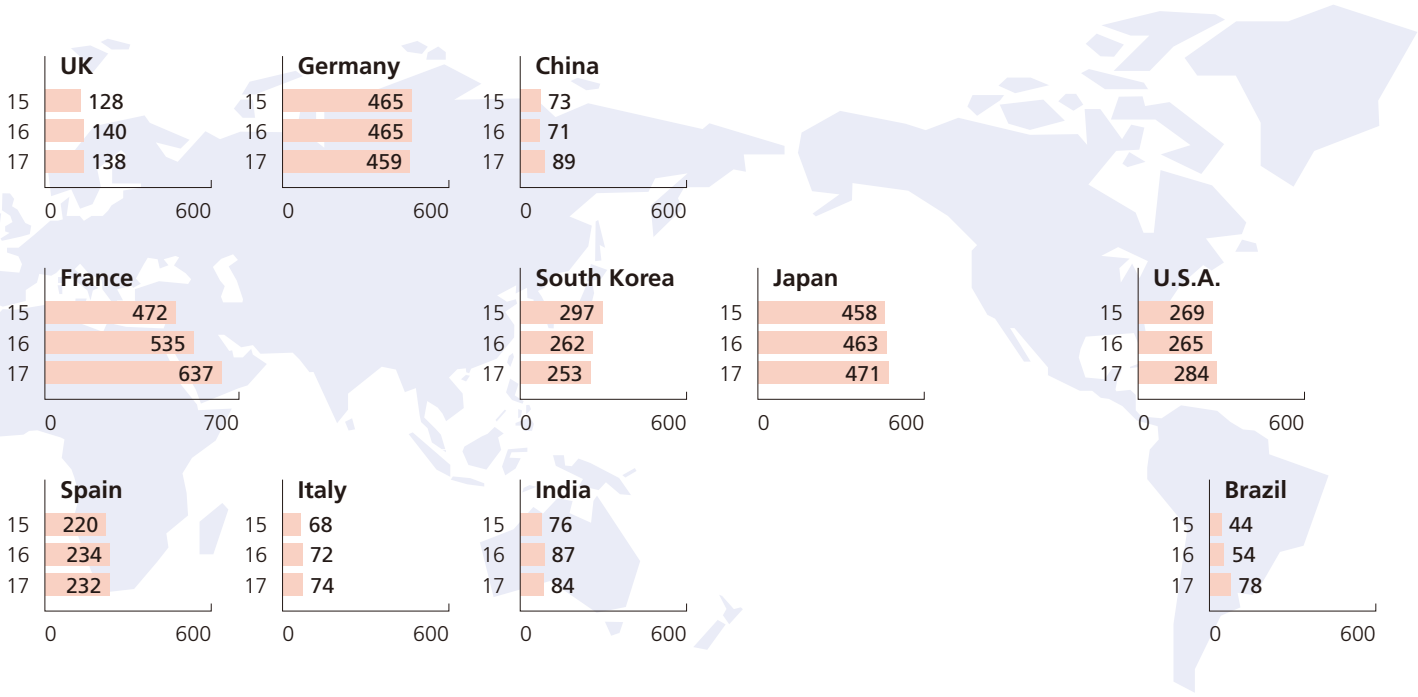
Sources: Ministry of Land, Infrastructure, Transport and Tourism; Ministry of Internal Affairs and Communications; Federation of Asian Motorcycle Industries (FAMI); European Association of Motorcycle Manufacturers (ACEM), etc.

Motor Vehicle Exports Increase in Brazil, China, and France

Motor vehicle exports (excluding motorcycles) in 2017 increased over the previous year in Brazil (up 46.0% to 785,000 units), China (up 25.8% to 891,000 units), and France (up 18.9% to 6.37 million units).

MOTOR VEHICLE EXPORTS (MAJOR EXPORTING COUNTRIES)

x 10,000 units



MOTOR VEHICLE EXPORTS (MAJOR EXPORTING COUNTRIES)

In vehicle units

Country	2015			2016			2017		
	Passenger Cars	Commercial Vehicles	Total	Passenger Cars	Commercial Vehicles	Total	Passenger Cars	Commercial Vehicles	Total
Japan	3,970,003	608,075	4,578,078	4,118,432	515,601	4,634,033	4,218,429	487,419	4,705,848
U.S.A.	2,206,701	487,591	2,694,292	2,114,606	539,082	2,653,688	2,221,875	617,586	2,839,461
Germany	4,406,206	244,015	4,650,221	4,411,152	239,901	4,651,053	4,378,108	210,417	4,588,525
UK	1,227,881	47,179	1,275,060	1,349,443	54,842	1,404,285	1,334,538	48,899	1,383,437
France	4,159,198	563,013	4,722,211	4,735,057	617,832	5,352,889	5,695,129	670,038	6,365,167
Italy	385,738	297,217	682,955	398,277	318,045	716,322	418,324	324,094	742,418
Spain	1,821,806	380,008	2,201,814	1,923,102	421,153	2,344,255	1,866,931	451,286	2,318,217
Brazil	316,777	125,236	442,013	409,251	128,175	537,426	625,155	159,563	784,718
South Korea	2,821,832	152,282	2,974,114	2,506,505	115,210	2,621,715	2,415,948	114,246	2,530,194
China	427,727	300,505	728,232	477,088	231,173	708,261	639,167	251,730	890,897
India	653,053	103,124	756,177	758,727	108,271	866,998	747,287	96,867	844,154

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

MOTORCYCLE EXPORTS (MAJOR EXPORTING COUNTRIES/TERRITORY)

In vehicle units

Country/Territory	2015	2016	2017
	Total	Total	Total
Japan	417,649	428,619	463,123
China	7,402,466	6,657,949	7,413,732
Taiwan	454,743	427,392	337,490
Indonesia	228,229	284,065	431,187
India	2,482,876	2,340,277	2,815,016

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

Automobile Customs Tariffs, EPAs-FTAs

After repeated reductions in tariff rates, import tariffs in Japan on finished motor vehicles and auto parts were abolished in 1978. Many other countries continue to impose tariffs on imported vehicles: for example, the United States imposes a 25% tariff on imported trucks and China levies a 15% tariff on finished vehicles. Aiming to abolish customs tariffs and thereby to liberalize and facilitate trade and investment, the Japanese government promotes the establishment of economic partnership agreements (EPAs) and free trade agreements (FTAs). According to the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP), which came into force in December 2018 for the countries that had ratified it by that date, automobile customs tariffs in the 11 signatory countries will be progressively reduced, with the goal being, depending on the country, eventual abolition. In line with the economic partnership agreement between Japan and the European Union that took effect on February 1, 2019, tariff rates on Japanese passenger cars imported into the EU will be lowered annually until their abolition in 2026. Also, with the enforcement of that agreement, more than 90% of the tariffs (in value terms) on imported Japanese auto parts were immediately abolished.

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

As of March 2019

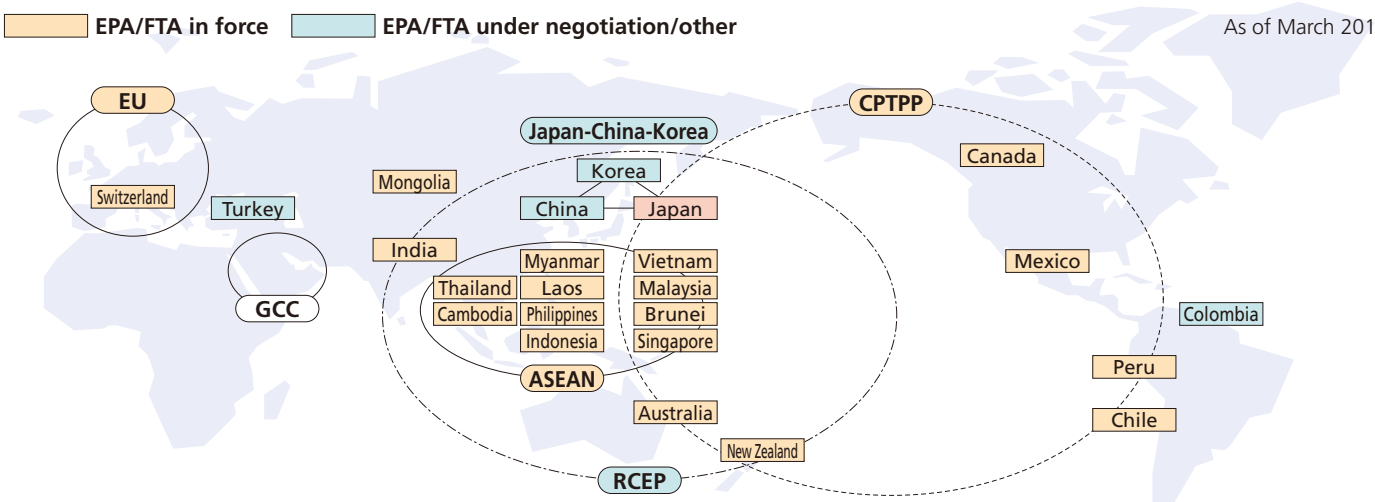
	Passenger Cars	Trucks	Buses	Auto Parts, Etc. (including vehicle bodies)
Japan	None	None	None	None
U.S.A.	2.5%	25% Cab chassis, from 5t up to 20t in GVW: 4%	2%	2.5%
China	15%	15%	15%	6%

Source: Japan Automobile Manufacturers Association

STATUS OF JAPAN'S ENGAGEMENT IN EPAs/FTAs

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

As of March 2019



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

Source: Ministry of Foreign Affairs

AUTOMOBILE CUSTOMS TARIFFS under the Japan-EU EPA and CPTPP

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

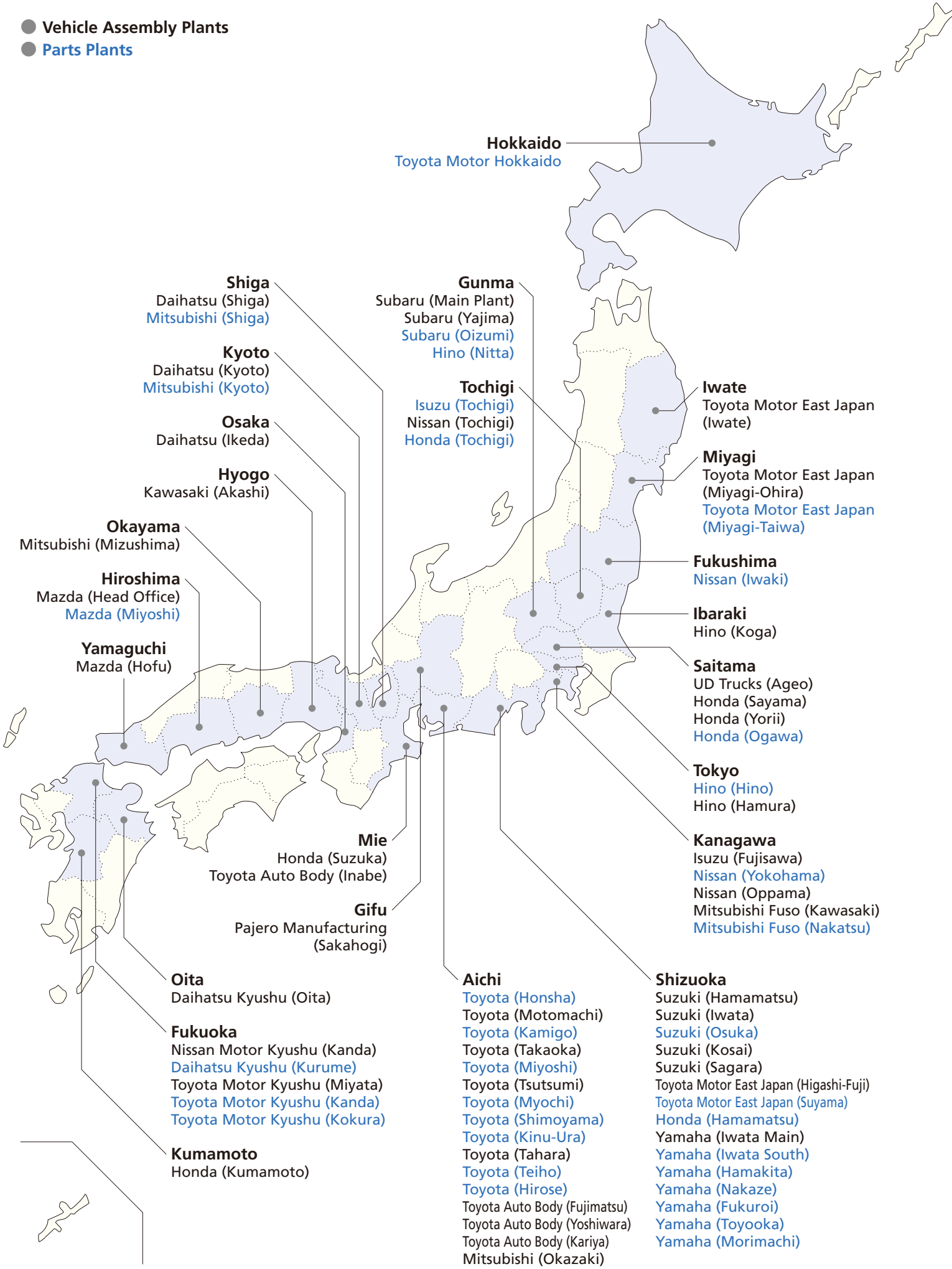
Note: Figures in brackets represent tariff rates imposed prior to reduction/abolition.

Source: Japan Automobile Manufacturers Association

Locations of Auto Manufacturing Plants

At April 1, 2019

● Vehicle Assembly Plants
● Parts Plants



Hokkaido
Toyota Motor Hokkaido

Shiga
Daihatsu (Shiga)
Mitsubishi (Shiga)

Kyoto
Daihatsu (Kyoto)
Mitsubishi (Kyoto)

Osaka
Daihatsu (Ikeda)

Hyogo
Kawasaki (Akashi)

Okayama
Mitsubishi (Mizushima)

Hiroshima
Mazda (Head Office)
Mazda (Miyoshi)

Yamaguchi
Mazda (Hofu)

Gunma
Subaru (Main Plant)
Subaru (Yajima)
Subaru (Oizumi)
Hino (Nitta)

Tochigi
Isuzu (Tochigi)
Nissan (Tochigi)
Honda (Tochigi)

Iwate
Toyota Motor East Japan (Iwate)

Miyagi
Toyota Motor East Japan (Miyagi-Ohira)
Toyota Motor East Japan (Miyagi-Taiwa)

Fukushima
Nissan (Iwaki)

Ibaraki
Hino (Koga)

Saitama
UD Trucks (Ageo)
Honda (Sayama)
Honda (Yorii)
Honda (Ogawa)

Tokyo
Hino (Hino)
Hino (Hamura)

Kanagawa
Isuzu (Fujisawa)
Nissan (Yokohama)
Nissan (Oppama)
Mitsubishi Fuso (Kawasaki)
Mitsubishi Fuso (Nakatsu)

Mie
Honda (Suzuka)
Toyota Auto Body (Inabe)

Gifu
Pajero Manufacturing (Sakahogi)

Oita
Daihatsu Kyushu (Oita)

Fukuoka
Nissan Motor Kyushu (Kanda)
Daihatsu Kyushu (Kurume)
Toyota Motor Kyushu (Miyata)
Toyota Motor Kyushu (Kanda)
Toyota Motor Kyushu (Kokura)

Kumamoto
Honda (Kumamoto)

Aichi
Toyota (Honsha)
Toyota (Motomachi)
Toyota (Kamigo)
Toyota (Takaoka)
Toyota (Miyoshi)
Toyota (Tsutsumi)
Toyota (Myochi)
Toyota (Shimoyama)
Toyota (Kinu-Ura)
Toyota (Tahara)
Toyota (Teiho)
Toyota (Hirose)
Toyota Auto Body (Fujimatsu)
Toyota Auto Body (Yoshiwara)
Toyota Auto Body (Kariya)
Mitsubishi (Okazaki)

Shizuoka
Suzuki (Hamamatsu)
Suzuki (Iwata)
Suzuki (Osuka)
Suzuki (Kosai)
Suzuki (Sagara)
Toyota Motor East Japan (Higashi-Fuji)
Toyota Motor East Japan (Suyama)
Honda (Hamamatsu)
Yamaha (Iwata Main)
Yamaha (Iwata South)
Yamaha (Hamakita)
Yamaha (Nakaze)
Yamaha (Fukuroi)
Yamaha (Toyooka)
Yamaha (Morimachi)

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https://www.honda.co.jp/

Isuzu Motors Limited

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http://www.isuzu.co.jp/world/

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Tel: (03) 3508-5031
http://www.mazda.co.jp/
http://www.mazda.com/

MITSUBISHI MOTORS CORPORATION

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http://www.mitsubishi-motors.com/en/

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10 Ohkura-cho, Nakahara-ku, Kawasaki, Kanagawa 211-8522
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Note: Manufacturers are listed in alphabetical order.

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http://www.nissan-global.com/EN/

Subaru Corporation

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Tel: (03) 6447-8000
https://www.subaru.co.jp/

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Minato-ku, Tokyo 105-0021 Tel: (03) 5425-2158
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http://www.globalsuzuki.com/

TOYOTA MOTOR CORPORATION

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Nagoya Office :
7-1 Meieki 4-chome, Nakamura-ku, Nagoya, Aichi 450-8711
Tel: (052) 552-2111
https://global.toyota/en

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https://www.udtrucks.com/ja-jp/home
https://www.udtrucks.com/

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  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]
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- Japan Automobile Research Institute (JARI) [Tokyo]
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  2-3, Uchisaiwaicho 2-chome, Chiyoda-ku, Tokyo 100-0011 (0120) 028-222

- Japan Automobile Recycling Promotion Center (JARC)
  1-30, Shiba-Daimon 1-chome, Minato-ku, Tokyo 105-0012 (03) 5733-8300

- Japan Auto Recycling Partnership (JARP)
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- Automobile Inspection & Registration Information Association (AIRIA)
  11-6, Iwamoto-cho 3-chome, Chiyoda-ku, Tokyo 101-0032 (03) 5825-3671

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

- Japan Automobile Dealers Association (JADA)
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- Japan Automobile Importers Association (JAIA)
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- Japan Automobile Federation (JAF)
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- Japan Auto Appraisal Institute (JAAI)
  34-4, Nishi-Shinbashi 2-chome, Minato-ku, Tokyo 105-0003 (03) 5776-0901

- Automobile Fair Trade Council (AFTC)
  11-30, Nagata-cho 1-chome, Chiyoda-ku, Tokyo 100-0014 (03) 5511-2111

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  10-1, Roppongi 6-chome, Minato-ku, Tokyo 106-6117 (03) 3404-6141

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- Motorcycle Federation of Japan (MFJ)
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- Japan Motorcycle Promotion & Safety Association
  25-15, Minami-Otsuka 2-chome, Toshima-ku, Tokyo 170-0005 (03) 6902-8190

- Japan Automobile Education Foundation (JAEF)
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  9, Kanda-Awajicho 2-chome, Chiyoda-ku, Tokyo 101-8335 (03) 3255-1844

- Institute for Traffic Accident Research and Data Analysis (ITARDA)
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- Japan Automobile Transport Technology Association (JATA)
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- Japan Automobile Standards Internationalization Center (JASIC)
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- ITS Japan
  6-8, Shiba-Koen 2-chome, Minato-ku, Tokyo 105-0011 (03) 5777-1011

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

- Japan Trucking Association
  2-5, Yotsuya 3-chome, Shinjuku-ku, Tokyo 160-0004 (03) 3354-1009

- Nihon Bus Association (NBA)
  4-1, Marunouchi 3-chome, Chiyoda-ku, Tokyo 100-0005 (03) 3216-4011

- All Japan Railway-Freight Forwarders Association
  21, Kanda-Awajicho 2-chome, Chiyoda-ku, Tokyo 101-0063 (03) 5296-1670

- Japan Federation of Hire-Taxi Associations
  8-13, Kudan-Minami 4-chome, Chiyoda-ku, Tokyo 102-0074 (03) 3239-1531

- All Japan Rent-A-Car Association
  1-30, Shiba-Daimon 1-chome, Minato-ku, Tokyo 105-0012 (03) 5472-7328

- Japan Federation of Authorized Drivers School Associations
  3-9, Kudan-Minami 2-chome, Chiyoda-ku, Tokyo 102-0074 (03) 3556-0070

- Japan Automobile Tyre Manufacturers Association, Inc. (JATMA)
  8-21, Toranomon 3-chome, Minato-ku, Tokyo 105-0001 (03) 3435-9091

- Auto-Parts & Accessories Retail Association (APARA)
  1-7, Shiba 5-chome, Minato-ku, Tokyo 108-0014 (03) 3454-1427

- Japan Traffic Safety Association
  8-13, Kudan-Minami 4-chome, Chiyoda-ku, Tokyo 102-0074 (03) 3264-2641

- The Japan Research Center for Transport Policy
  12-6, Kudan-Kita 1-chome, Chiyoda-ku, Tokyo 102-0073 (03) 3263-1945

- Japan Road Association (JARA)
  3-1, Kasumigaseki 3-chome, Chiyoda-ku, Tokyo 100-8955 (03) 3581-2211

- Express Highway Research Foundation of Japan (EHRF)
  11-10, Minami-Azabu 2-chome, Minato-ku, Tokyo 106-0047 (03) 6436-2100

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