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JAPAN No. 384

JC/134/13
LC/86/13
BARs/88/13
WG-TEP-EXT/94/13
TF-EOBD/41/13
TF-TR/34/13
WG-AE/71/13
WG-CVD/68/13
WG-PS/181/13
Mr. J. Estavoyer, PSA Peugeot
Citroën
Mr S. Dies, Renault
Mr. R. Braeutigam, Volkswagen
Mr. M. Missbach, Volkswagen
Mr. G. Thöne, Volkswagen

Copy: ACEA Management

Subject: Japan monthly report – September 2013

Please find attached the September 2013 report of the ACEA representative office in Tokyo.

We remain at your disposal should you need any further information.

Best regards,

Erik Bergelin

Encl.

Ref. ACEA: 20131164

**ACEA TOKYO OFFICE
MONTHLY REPORT
SEPTEMBER 2013**

Visit of Mr Hodac and Mr Jonnaert to Japan

Mr Hodac, accompanied by Mr Jonnaert, visited Tokyo on 24-25 September to say goodbye to his interlocutors in Japan and to introduce his successor, as Secretary-General of ACEA.

Messrs Hodac and Jonnaert called on the Ministry of Foreign Affairs, METI, MLIT and Mr Schweisgut, the EU Ambassador, as well as having meetings with JAIA and members of the EBC Automobile Committee. These conversations provided an opportunity to review the prospects for sales by ACEA members in Japan, the EU-Japan FTA negotiations, the harmonisation of technical requirements between the EU, Japan and the US, Japan's adoption of further UN Regulations and the reform of automobile taxation in Japan, particularly as it relates to the privileges enjoyed by kei-cars.

ACEA asked both MFA and METI to ensure that Japan's implementation of the decision of the Contracting Parties of the Stockholm Convention to ban the manufacture/import of HBCD and the lack of progress in reaching agreement on a generic exemption from import inspection for hydrogen airbags do not disrupt car imports.

JAIA Policy Paper 2014

The JAIA Next Generation Vehicles Committee, chaired by Mr Millington, approved the JAIA Policy Paper for 2014 at its meeting on 26 September. The final version will be issued in the second week of October.

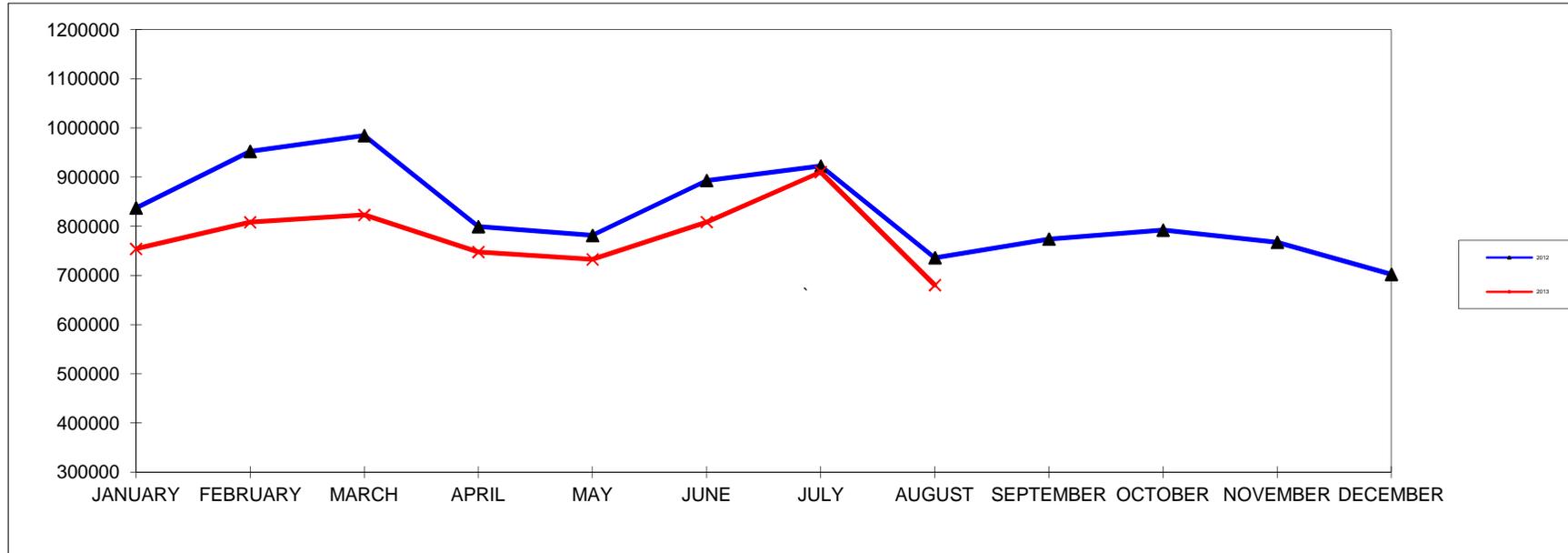
Market Data

The latest market statistics are attached.

ACEA Tokyo Office

7 October 2013

Japan: Automobile Production
August, 2013



	JANUARY	FEBRUARY	MARCH	APRIL	MAY	JUNE	JULY	AUGUST	SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER	TOTAL
2012	837,197	952,268	984,567	799,474	781,340	893,149	922,685	735,999	773,990	792,166	767,530	702,285	9,942,650
2013	754,054	808,194	823,145	747,730	732,714	808,557	910,114	680,487					6,264,995

	Passenger Cars				Trucks				Buses			TOTAL
	Standard-sized Cars	Small-sized Cars	Kei Cars	Sub-Total	Standard-sized	Small-sized	Kei	Sub-Total	Big-sized	Small-sized	Sub-Total	
Aug-13	319,682	140,719	116,446	576,847	42,433	22,381	28,780	93,594	799	9,247	10,046	680,487
Aug-12	339,897	179,809	115,486	635,192	43,875	21,543	26,812	92,230	831	8,166	8,997	736,419
13 / 12	94.1	78.3	100.8	90.8	96.7	103.9	107.3	101.5	96.1	113.2	111.7	92.4

SOURCE : JAMA

JAPAN NEW AUTOMOBILE REGISTRATIONS: August, 2013

	This Month	13/12 %	Year to Date	13/12 %
Standard-Sized Cars	92,739	94.3	915,052	90.2
Imports	17,182	118.7	145,598	108.9
Small-Sized Cars	96,128	90.2	974,318	84.6
Imports	5,755	89.0	64,804	119.5
Mini Cars	121,824	110.0	1,134,572	101.2
Total Passenger Cars (a)	310,691	98.4	3,023,942	92.0
Imports (b)	22,937	109.5	210,402	112.0
Standard-Sized CV's	10,675	112.2	89,617	99.8
Imports	148	75.9	1,416	87.8
Small-Sized CV's	16,937	99.5	155,970	101.6
Imports	869	79.7	8,566	104.4
Mini-CV's	27,519	99.6	273,182	93.4
Total CV's (c)	55,131	101.8	518,769	96.8
Imports	1,017	79.1	9,982	101.7
Buses (d)	932	112.2	7,746	89.2
Imports	-	-	-	-
Total (excl. mini vehicles)	217,411	93.6	2,142,703	88.6
Total (incl. mini vehicles)	366,754	98.9	3,550,457	92.7
(a + c + d)				
Imports	23,956	107.7	220,414	111.5
Passenger Car Imports from Transplants (x)	3,484	74.5	38,856	104.5
Total Pure Passenger Cars Imports (b - x = y)	19,453	119.6	171,546	113.8
Pure Car Imports as Share of Total Passenger Car Market y/a %	6.3%		5.7%	

Source: JADA, JAIA, Zenkei

Note: 1) % figures : 2010 registrations as percentage of those in previous year.

2) Standard sized car: displacement in excess of 2000 cc.

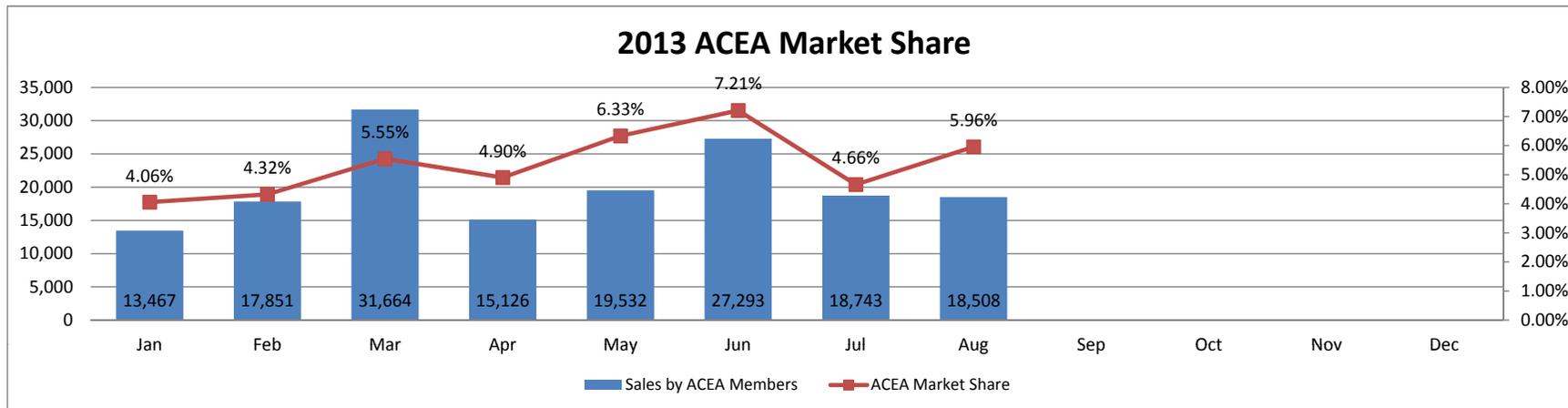
3) Small sized car: displacement between 661 & 2000 cc.

4) Mini Car: 660 cc & less.

2013 ACEA Market Share - Monthly

2013 - ACEA Share	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
BMW	2,839	3,627	7,608	3,675	4,883	6,601	4,462	4,192					37,887
Fiat	389	683	1,264	715	1,075	1,367	650	728					6,871
Ford Europe	0	0	0	0									0
GME	1	1	0	0	0	1	0	1					4
Land Rover & Jaguar	440	287	483	249	362	439	294	353					2,907
Mercedes-Benz	2,407	3,227	6,446	2,846	4,127	5,942	3,585	4,207					32,787
Porsche	248	278	473	455	367	451	326	298					2,896
PSA	492	712	1,195	526	683	808	699	559					5,674
Renault	180	259	530	184	252	201	395	187					2,188
Volvo	396	947	1,903	955	1,225	1,860	1,440	1,658					10,384
VW & Audi	6,075	7,830	11,762	5,521	6,558	9,623	6,892	6,325					60,586
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
Sales by ACEA Members	13,467	17,851	31,664	15,126	19,532	27,293	18,743	18,508					162,184
Total Passenger Car Sales in Japan (b)	332,066	412,856	570,691	308,556	308,436	378,709	401,937	310,691					3,023,942
ACEA Market Share (a) / (b)	4.06%	4.32%	5.55%	4.90%	6.33%	7.21%	4.66%	5.96%					5.36%
ACEA Members Total Sales (Jan - Aug 2013)	162,184												
ACEA Members Share (Average Jan - Dec 2013)	5.36%												

Source: JAIA, JAMA



AUTOMOBILE EXPORTS BY REGION

August, 2013

Region	August			Year to Date		
	Units	Composition	13/12%	Units	Composition	13/12%
Asia	41,611	11.8%	94.0	355,360	11.6%	88.1
Middle East	42,365	12.1%	126.5	381,643	12.5%	111.7
EU	29,937	8.5%	111.8	216,760	7.1%	80.6
Europe	54,449	15.5%	86.1	464,233	15.2%	79.5
U.S.A	125,566	35.8%	106.3	1,096,075	35.8%	97.0
North America	134,882	38.4%	101.9	1,211,117	39.6%	95.8
Central America	11,587	3.3%	103.0	98,553	3.2%	98.4
South America	18,235	5.2%	127.8	140,700	4.6%	102.6
Africa	13,596	3.9%	107.6	123,480	4.0%	108.4
Oceania	34,166	9.7%	106.7	282,185	9.2%	93.8
Others	326	0.1%	69.5	3,178	0.1%	80.5
TOTAL	351,217	100.0%	102.1	3,060,449	100.0%	94.2

Source: JAMA

Automobile Exports by Value (Million Yen, %)
August, 2013

		US		EU		ASIA		TOTAL	
		VALUE	% Rate of Increase '13/'12	VALUE	% Rate of Increase '13/'12	VALUE	% Rate of Increase '13/'12	VALUE	% Rate of Increase '13/'12
Automobiles (8701.10-9, 8701.20, 8701.90.9, 8702/8706)	This month	284,687	35.8%	62,595	32.0%	115,734	6.6%	795,080	21.0%
	YTD	2,342,497	17.2%	434,827	-7.9%	938,154	-10.4%	6,642,569	6.1%
Passenger Cars (8703.21/8703.90)	This month	277,252	35.7%	60,846	36.9%	80,118	4.4%	680,393	23.4%
	YTD	2,278,400	17.2%	420,220	-8.3%	645,977	-9.3%	5,673,967	7.4%
Buses/Trucks (8702, 8703.10, 8704/8705)	This month	6,608	25.9%	1,748	-39.2%	24,818	8.0%	100,877	6.0%
	YTD	60,039	16.2%	14,527	2.8%	215,330	-19.8%	872,346	-3.0%

?: change over June 2010

Source: Ministry of Finance

Note : Total = Global Exports