



JAMA-CLEPA
BUSINESS SUMMIT

JAMA-CLEPA Business Summit

Venice, 27-28 October 2016

*European automotive suppliers meet
Japanese vehicle manufacturers*



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Overview of the Japanese Automobile Industry

*Yoshihiro YANO
Executive Director & Secretary General
Japan Automobile Manufacturers Association, Inc.*

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About JAMA



Established: 3 April 1967

Objectives: To promote the sound development of the automobile industry, domestically and globally, and contribute to social and economic welfare.

Current Chairman:

Hiroto SAIKAWA
Chief Competitive Officer & Vice Chairman
Nissan Motor Co., Ltd.



Member Companies (14 in total):



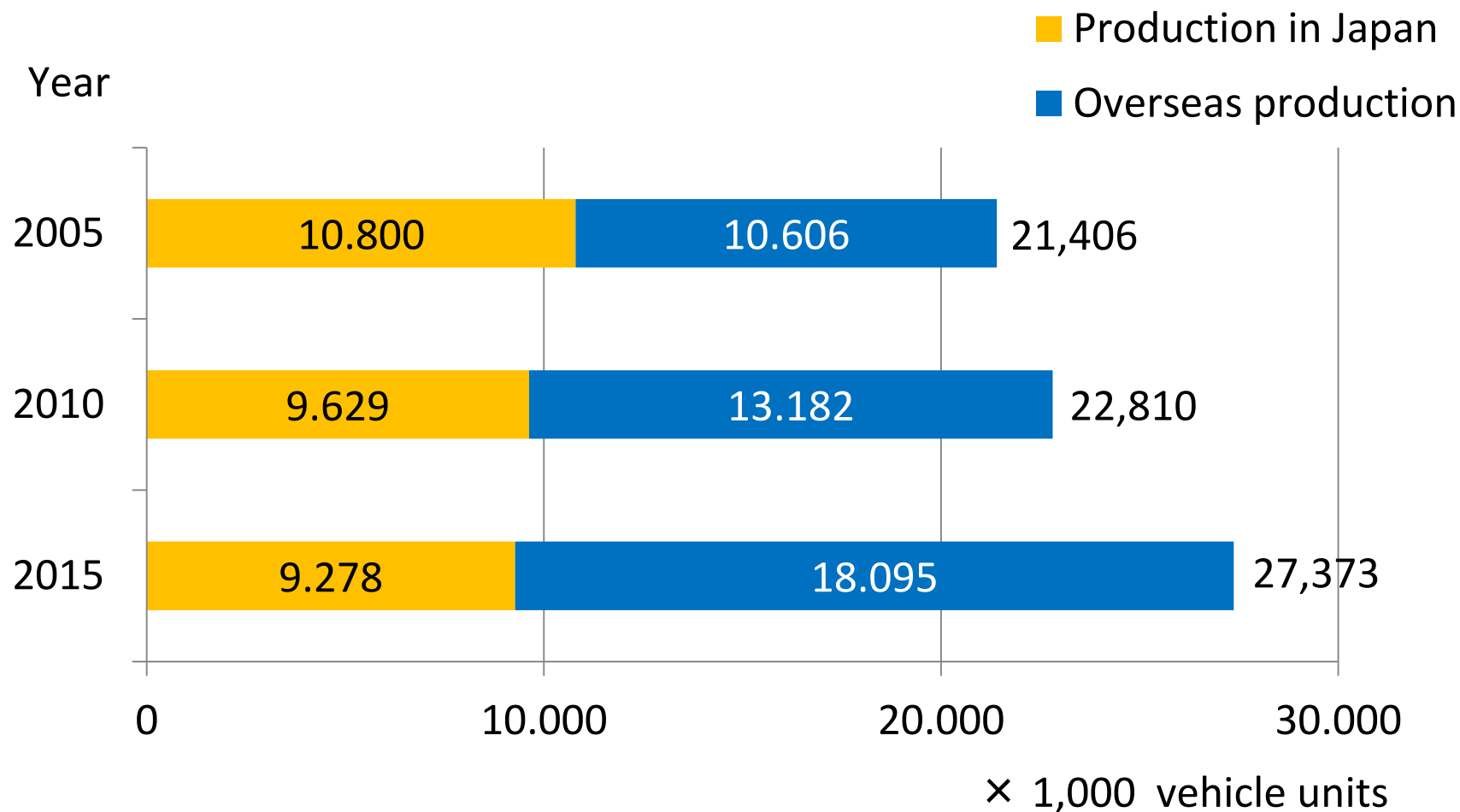
NISSAN MOTOR CORPORATION



Friend of JAMA: General Motors Japan, Ltd.

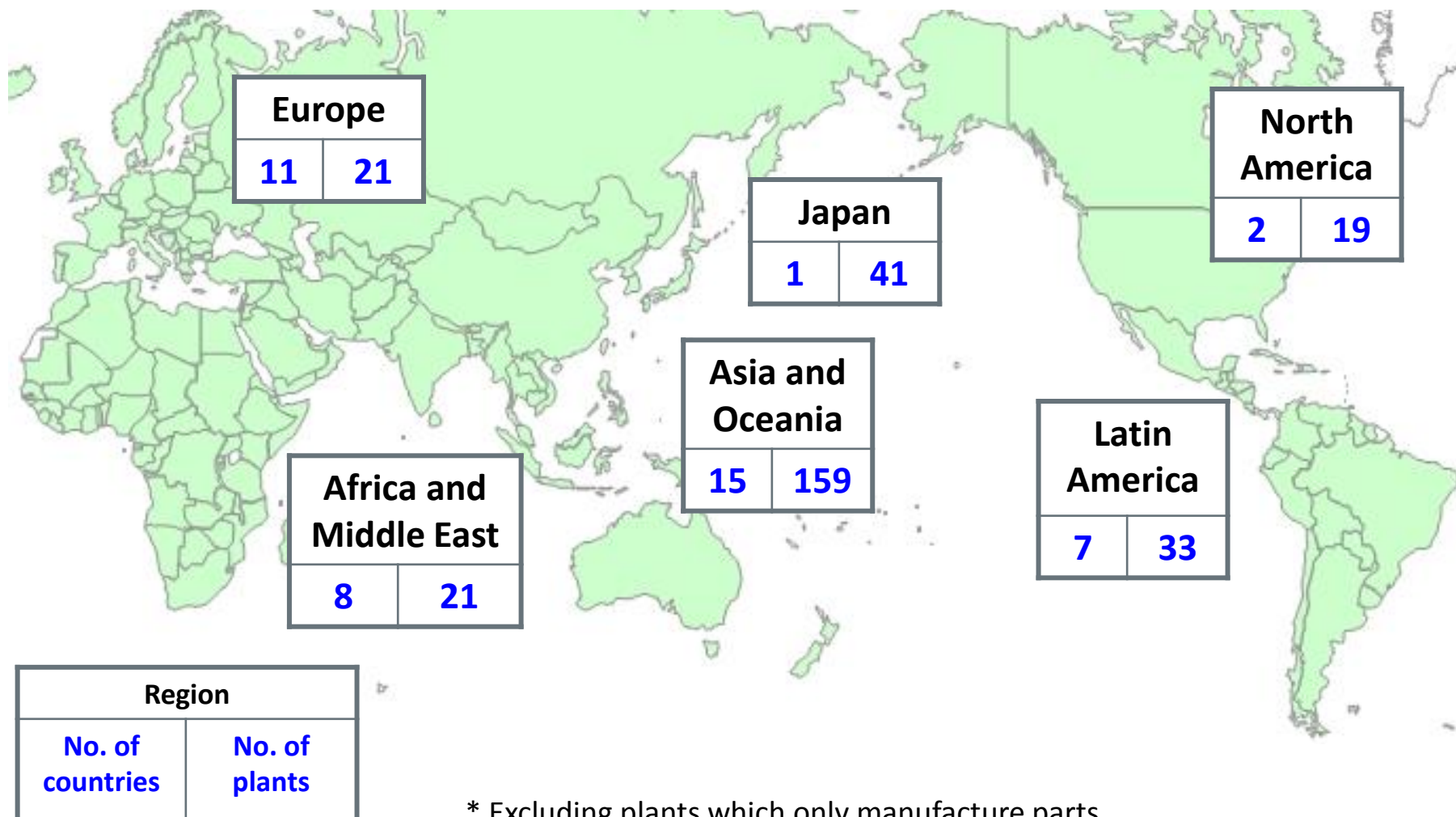
2. Current Trends in the Japanese Automobile Industry

2.1 Japanese Automakers' Domestic and Overseas Production



Source: JAMA

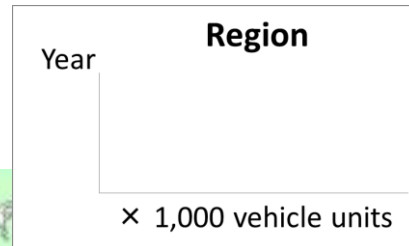
2.2 Japanese Automakers' Production Sites* Worldwide (as of 2015)



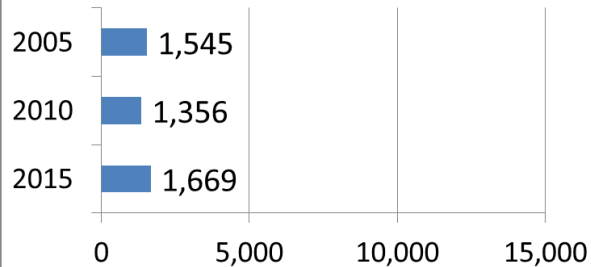
* Excluding plants which only manufacture parts

Source: JAMA

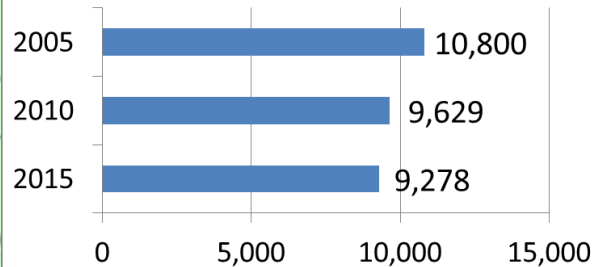
2.3 Japanese Automakers' Global Production Volumes



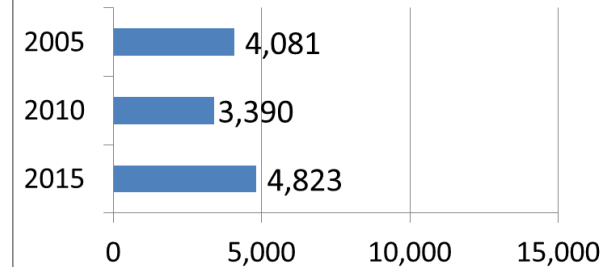
Europe



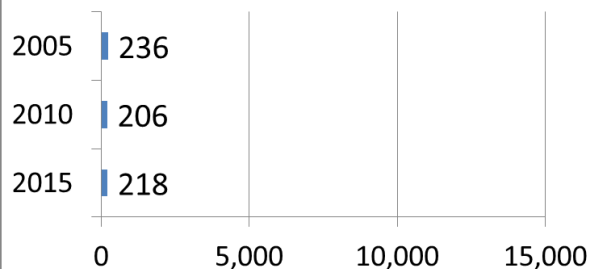
Japan



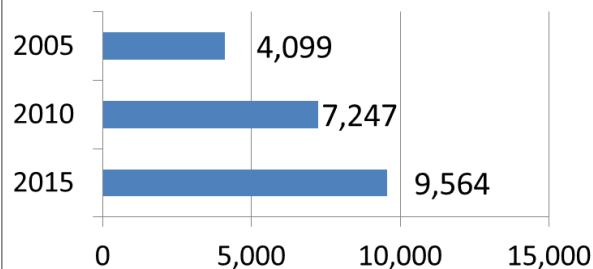
North America



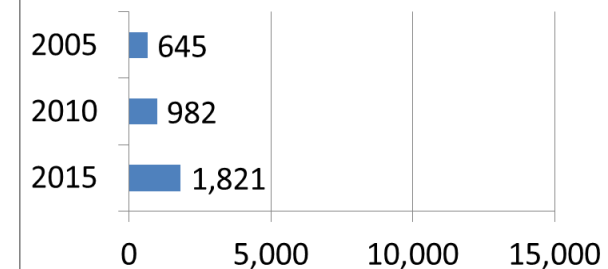
Africa and Middle East



Asia and Oceania

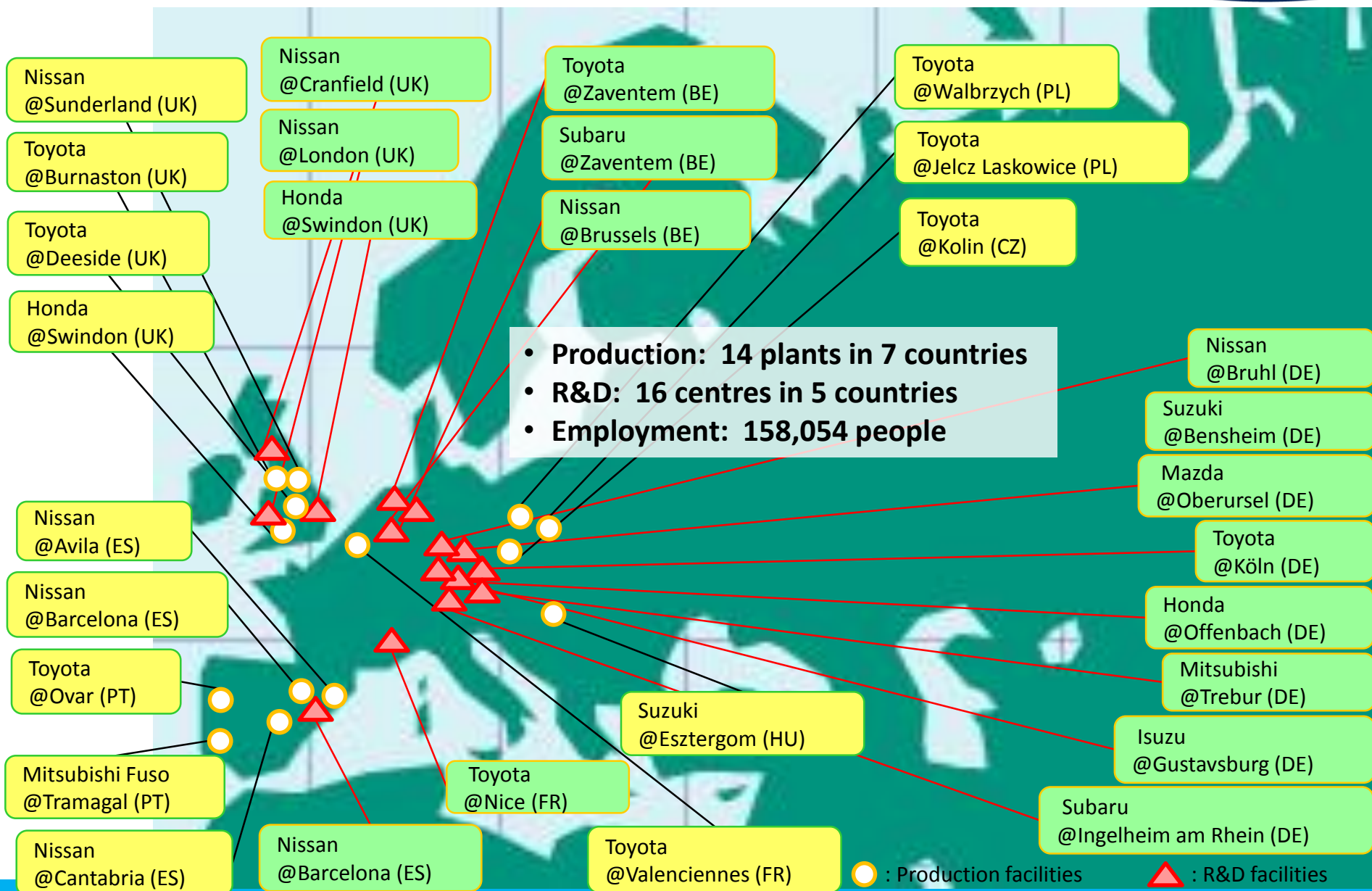


Latin America

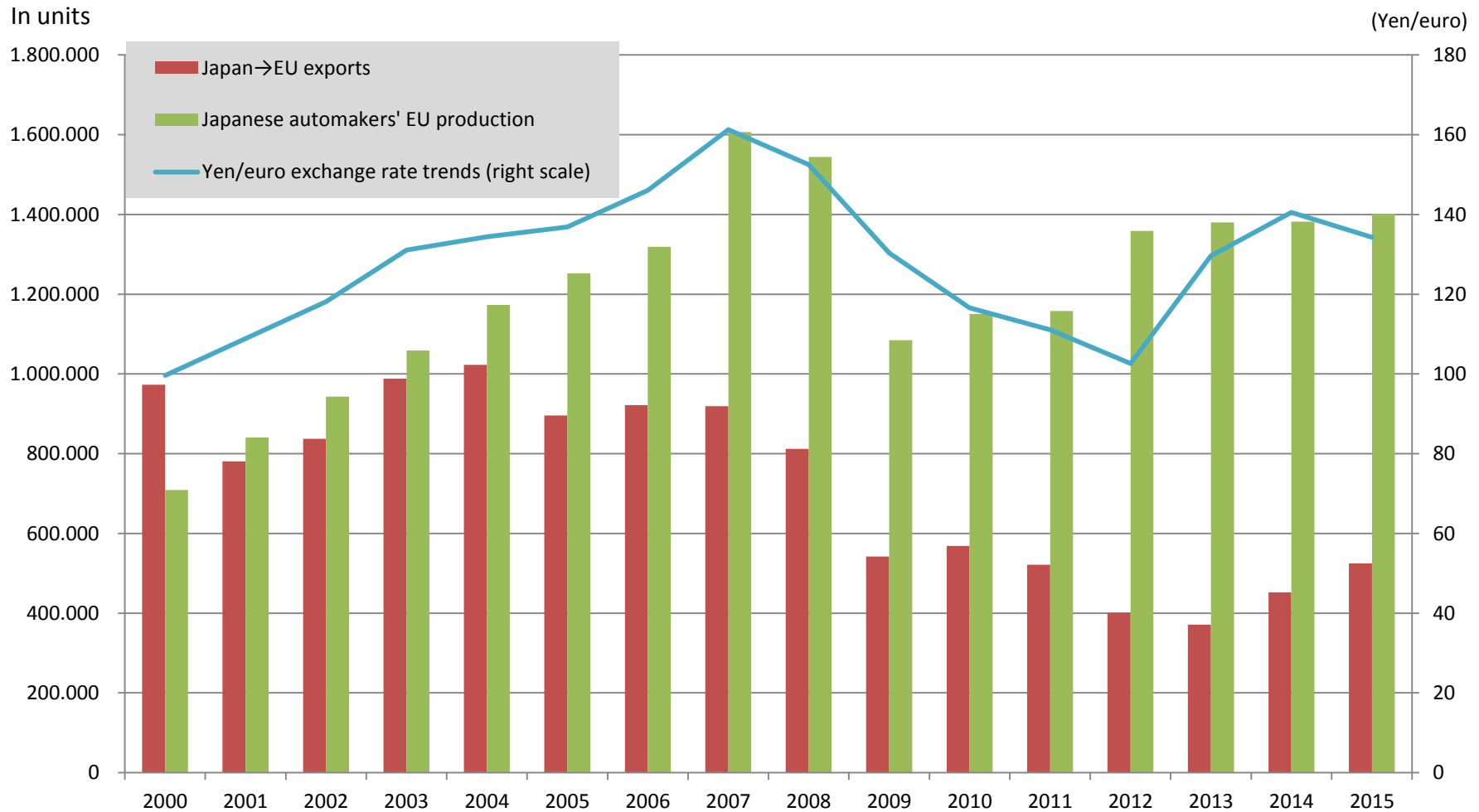


Source: JAMA

2.4 Japanese Automakers in the EU: Production and R&D Facilities



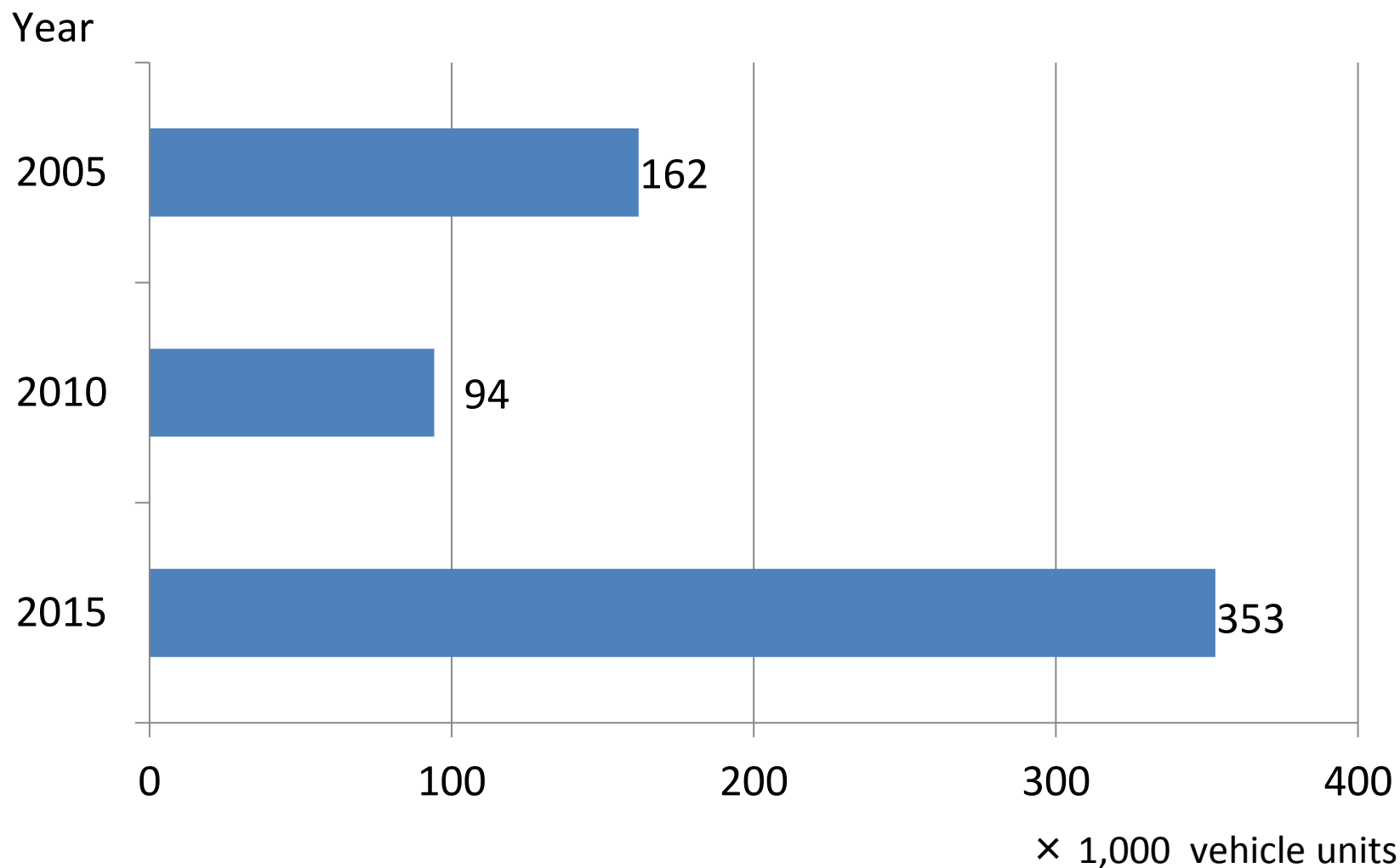
2.5 Japanese Automakers in the EU: Trends in Local Production / Imports from Japan



- EU production by Japanese automakers has risen steadily.
- In 2015, EU production by Japanese automakers totalled 1.40 million units.

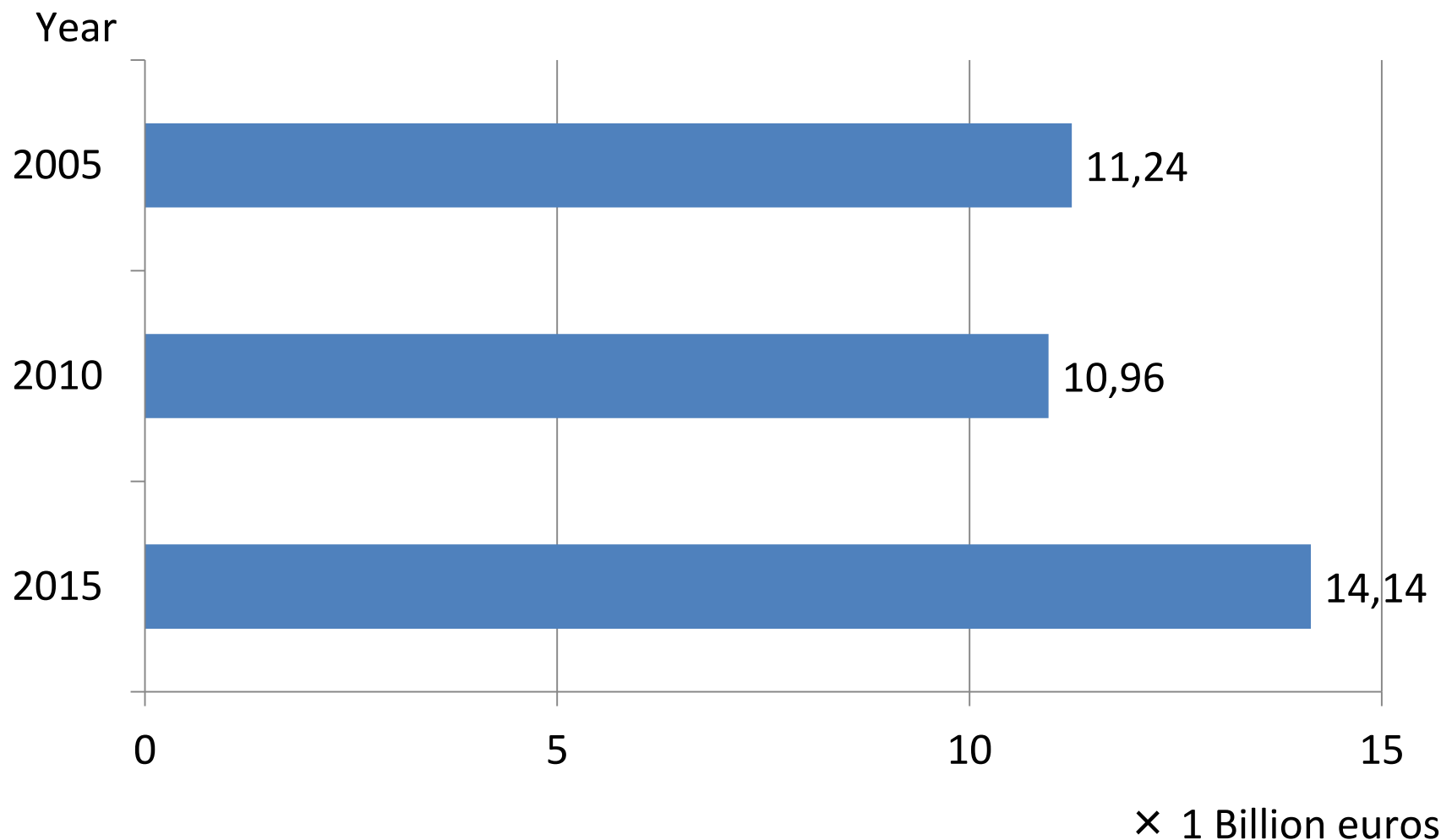
Source: JAMA

2.6 Japanese Automakers' EU-Made Vehicle Exports



Source: JAMA

2.7 Japanese Automakers' Purchases of EU-Made Parts*



* Comprising parts purchased for use in production operations in the EU and in Japan.

Source: JAMA

2.8 Japanese Automakers' Approach to Parts Procurement

- Conduct an open procurement process
⇒ An “open door” transaction policy is always pursued.
- Evaluate based on Quality, Cost, Delivery, Development factors
⇒ Parts must be competitive from a QCDD perspective.
- Prioritize safety, the environment, compliance
⇒ Performance and regulatory compliance are critical criteria.
- Maximize globalization
⇒ Parts procurement across national/regional lines is increasing.



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Thank you for your attention!
ご清聴ありがとうございました。
Grazie per l'attenzione!

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