

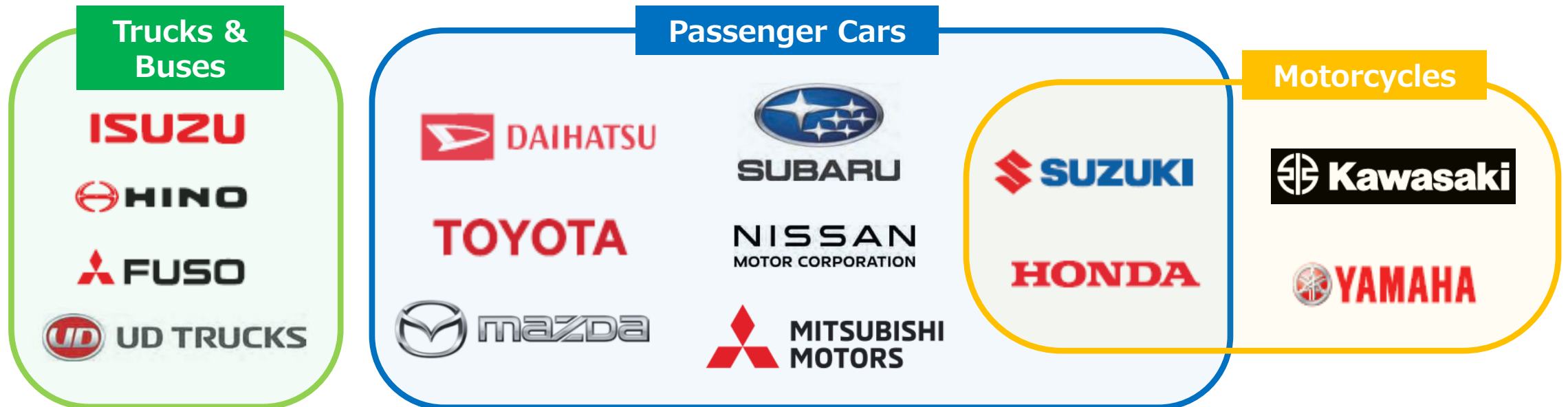
ASEAN-Japan Economic Co-Creation Forum 2024

Session 1 Next-Generation Vehicles

Japan Automobile Manufacturers Association, Inc. (JAMA)
Toranomon Hills Forum
December 20, 2024

1. Profile of the Japan Automobile Manufacturers Association (JAMA)

- Established: April 3, 1967
- Objectives: To promote the sound development of the automobile industry and contribute to social and economic welfare.
- Activities:
 1. Conducts studies and surveys related to automobile production, distribution, trade and use.
 2. Assists in the rationalization of automobile production, and helps establish policy for the development, advancement and promotion of production technology.
 3. Establishes and promotes policies related to automobile trade and international exchange.
 4. Carries out other activities involved in meeting its organizational objectives.
- Chairman: KATAYAMA Masanori (Chairman and CEO, Isuzu Motors Limited)
- Member companies:



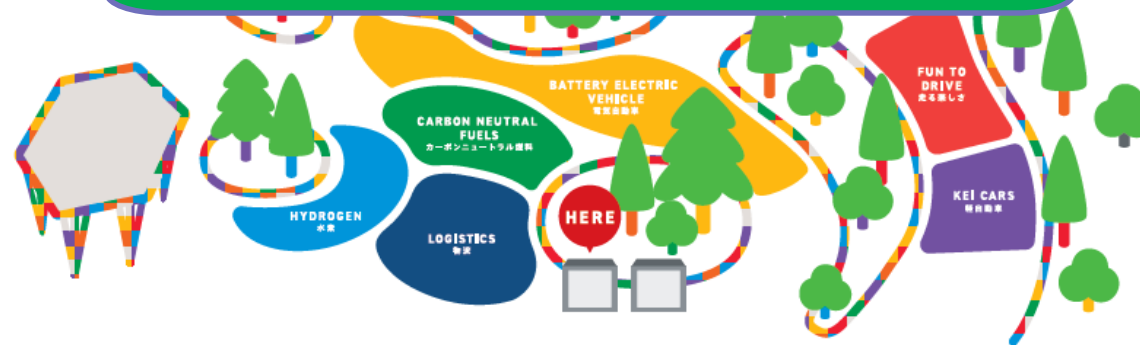
DIVERSITY IN CARBON NEUTRALITY

カーボンニュートラルにも、多様性を。

- There is more than one approach to achieving carbon neutrality.
- Practical pathways to CO₂ reduction must be pursued on the basis of cooperation among all stakeholders.

mission

Diverse options are important.

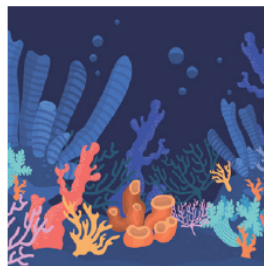


地球温暖化が及ぼす様々な影響



Rising Sea Levels

海面水位の上昇



Changes in animal and plant habitats

動物や植物の生息域が変わる



Flooding caused by Heavy rain

豪雨が増加し、洪水の影響が大きくなる



Great risk to food security

食料安全保障に大きなリスク

mission

Greenhouse Gases must be reduced to prevent Global Warming

「温室効果ガス」を減らし、地球温暖化を防ぐ

The whole world must come together as one in the pursuit of carbon neutrality.

カーボンニュートラルの実現に向けて、世界中のみんなが一丸となり、取り組むことが必要。

mission

Reducing CO2 emissions from already existing cars is also important.

保有車のCO2削減も重要

issue
03

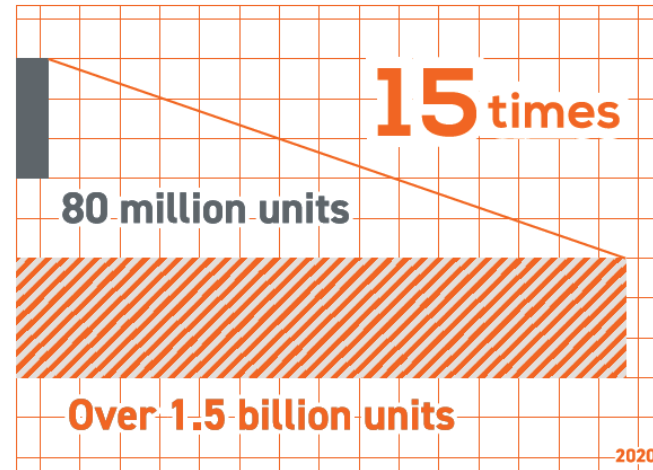
Already existing cars outnumber new cars sold in a year by 15 times.

車両の保有台数は新車販売台数の15倍以上

New car sales



Cars in operation



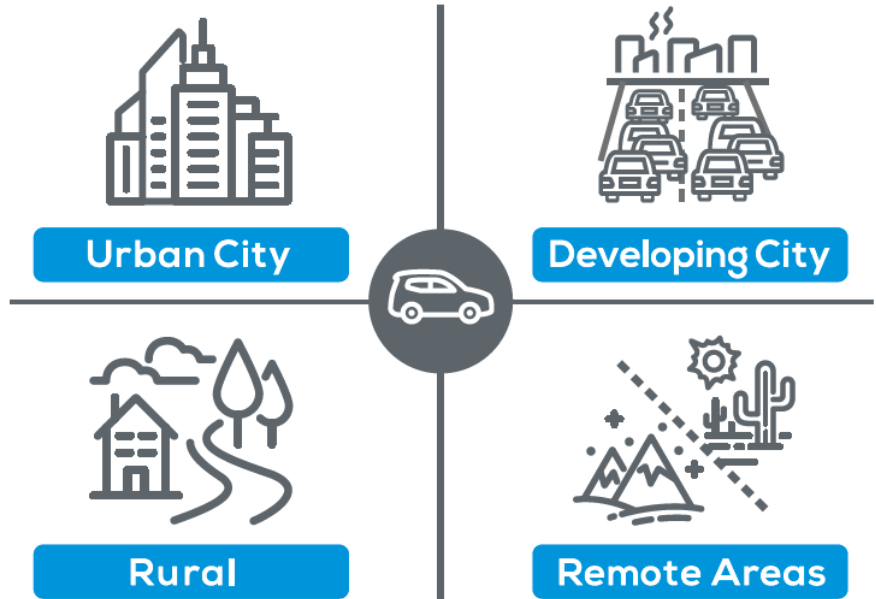
出典: JAMA

Doing what we can immediately by pursuing diverse solutions that leave no one behind is important.

今すぐできること。
だれ一人取り残すことのない、
多種多様な取り組みが大切。



モビリティの使われ方や使用環境は多様



Renewable energy **28%**
 People with no access to electricity **10%**
(800million)

再生可能エネルギー 約28% 電気が使えない人口 約10% (8億人)
出典: IEA WEO2022

mission Countries around the world are working toward carbon neutrality in ways that fit their region and environment

世界各国、各地域や環境に沿ったCN対応を進める

Doing what we can immediately by pursuing diverse solutions that leave no one behind is important.

今すぐできること。だれ一人取り残すことのない、多種多様な取り組みが大切。

JAMA Stance on Carbon Neutrality

JAMA member companies will make maximum efforts towards the achievement of carbon neutrality by 2050.

JAMA Stance

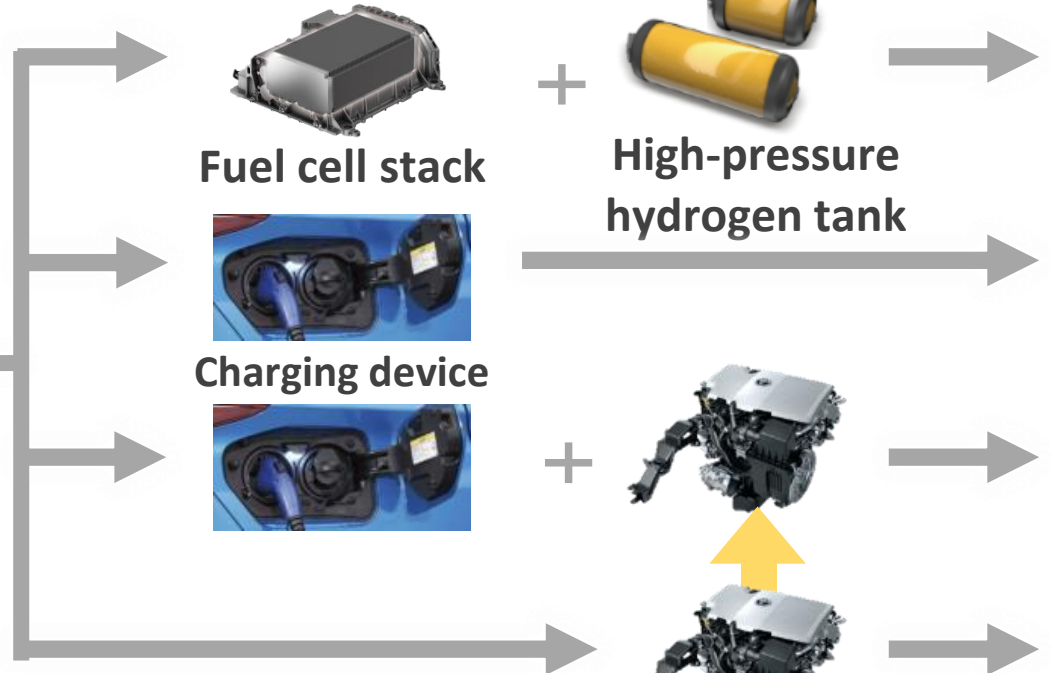
JAMA member companies, together with their global stakeholders, will make maximum efforts towards carbon neutrality by 2050 by developing technologies to further reduce automotive CO₂ emissions so that they can provide optimal choices for consumers in countries/regions worldwide.

- The goal is carbon neutrality (CN).
 - Approaches to achieving CN should be “technology-open.”
 - ➔ A diversity of options is crucial to achieving the goal.
- There are optimal pathways to CN for individual economies.

Electrification Technologies for Carbon Neutrality

Electrification Core Technologies

Motor Battery Power control unit



FCEV

BEV

PHEV

HEV

Carbon Neutral Fuels

Hydrogen, e-fuels, bio-fuels, etc.

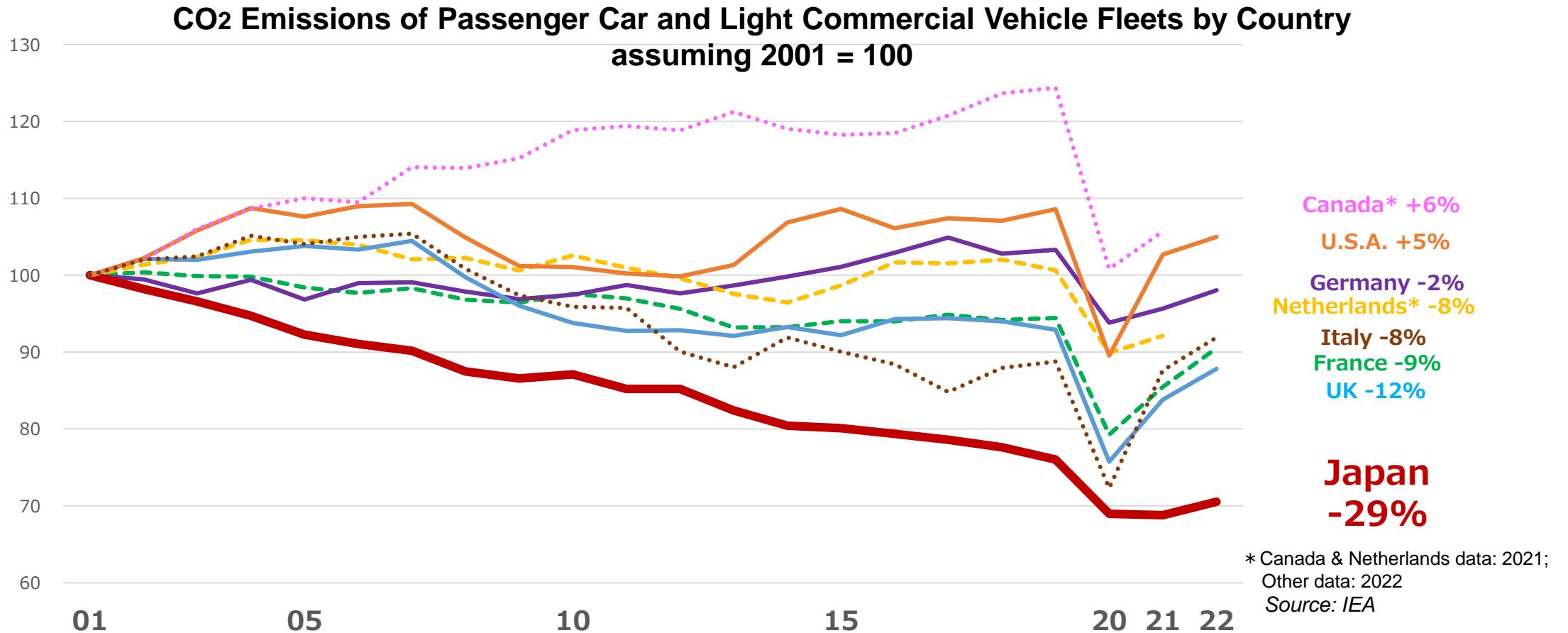


ICE



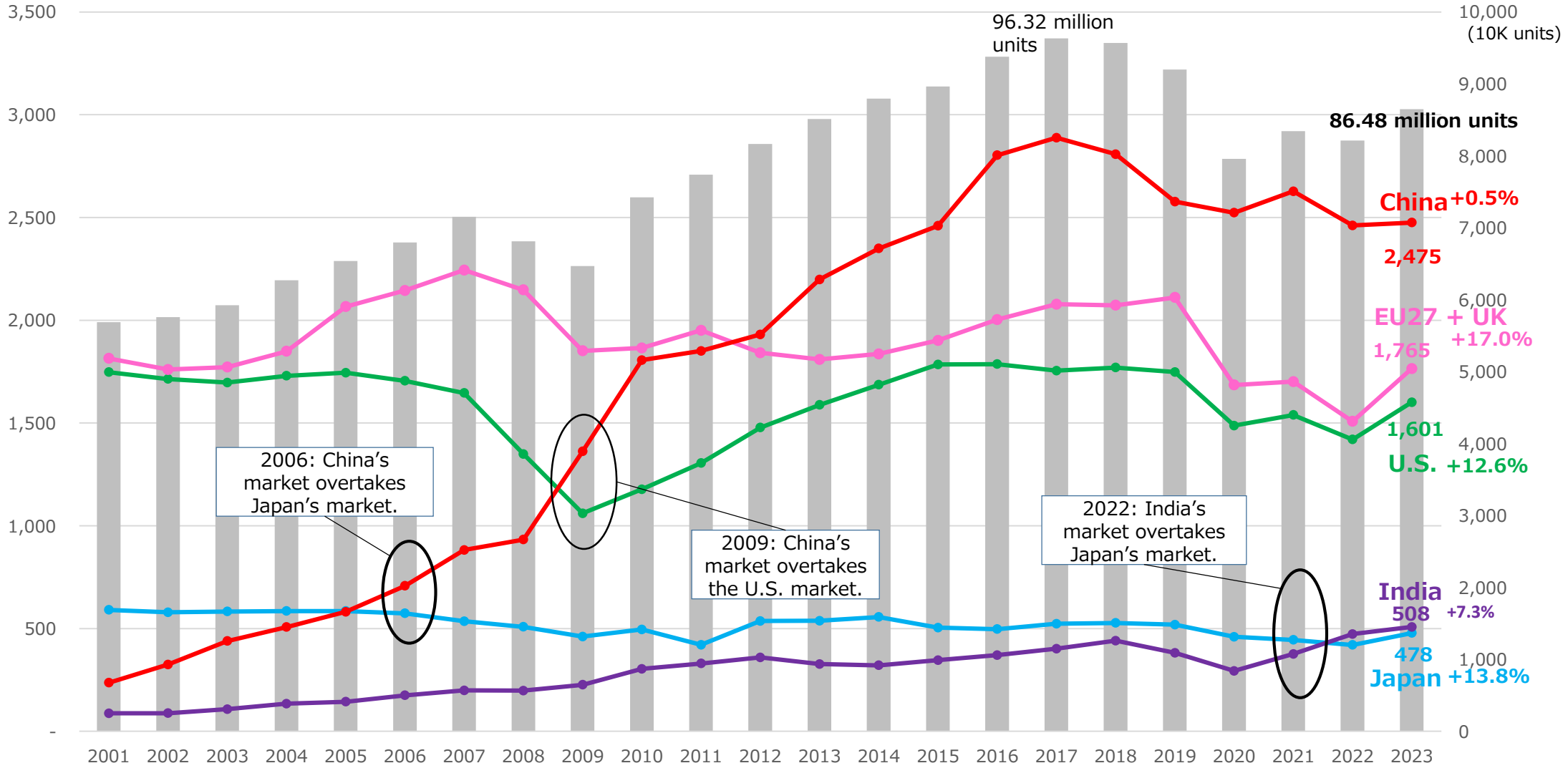
Reductions in CO2 Emissions from Motor Vehicles: International Comparisons

- Japan's -29% reduction in CO2 emissions from passenger cars and light commercial vehicles since 2001 is a very significant achievement by international standards.



Sales of Motor Vehicles in Major Countries/Regions

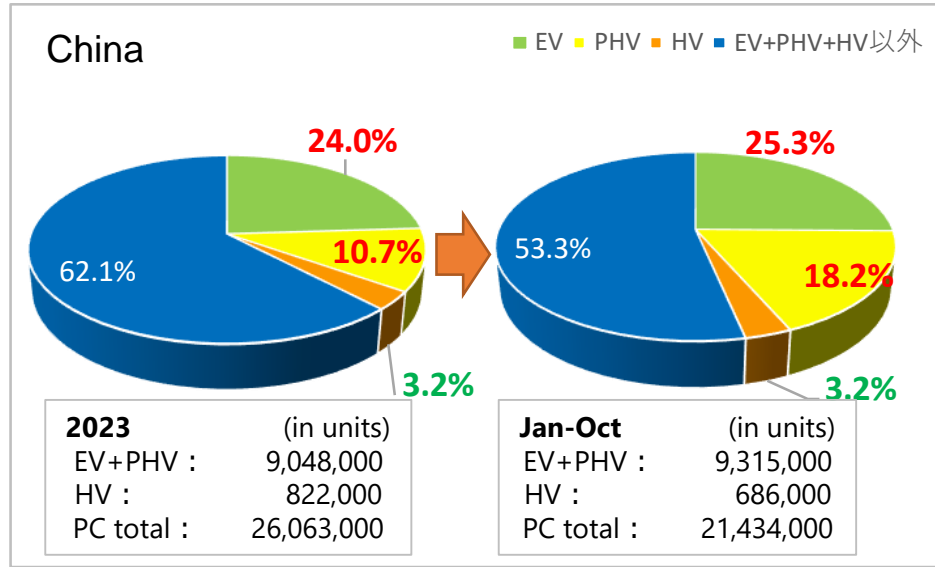
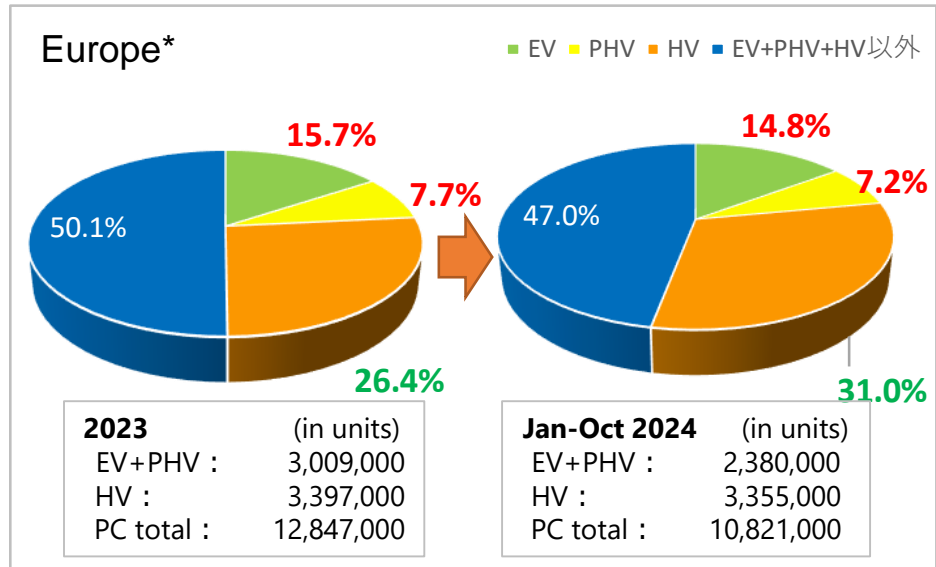
The global automotive market in 2023 totalled 86.48 million units, up 5.2% from the previous year. China's market remains flat. Europe's and the US's recovered due to the resolution of inventory shortages. India's continues to expand.



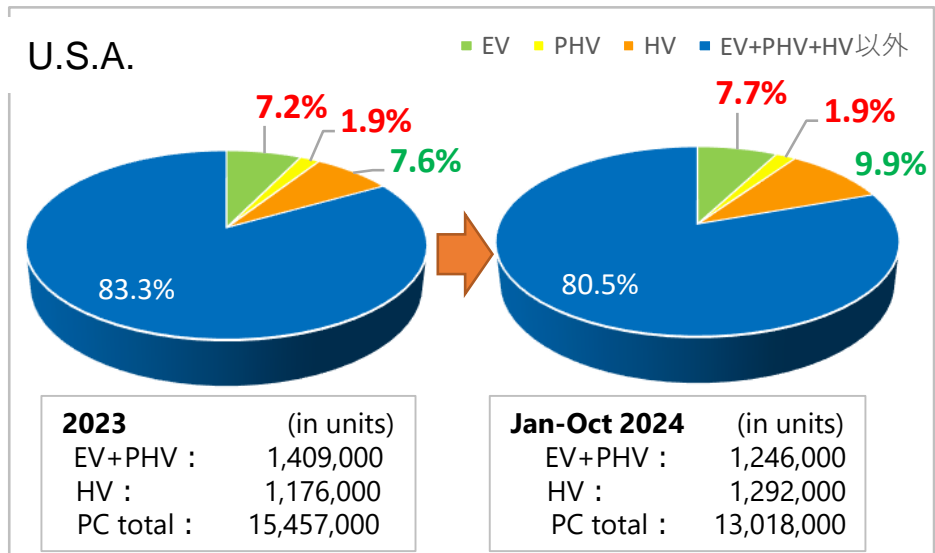
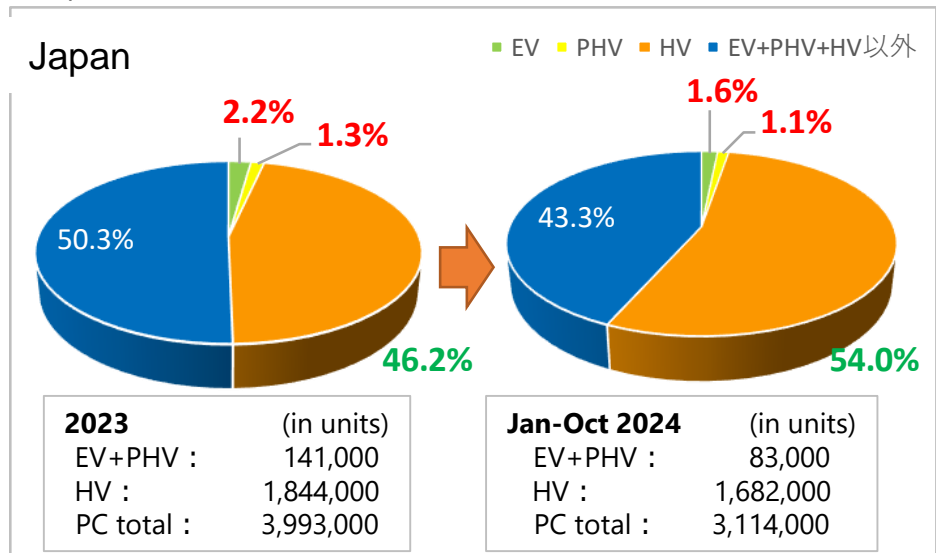
Sources: Compiled by JAMA from Ward's, FOURIN etc. (2023 data includes estimates and forecasts by FOURIN.) China data sources: CAAM (until 2021), FOURIN (from 2022) (Calendar year)

Electrification Trends in Passenger Car Markets by Country/Region

In Jan-Oct 2024, the PHV share increased year-on-year in China while the HV share increased in other markets.



*Europe includes the 27 EU countries, the UK, and 3 EFT countries.



■ JAMA Members' Contributions to ASEAN

Since the early 1960s, Japanese automakers have been continuously contributing to economic and social welfare in the ASEAN region by creating investment as well as high-quality employment opportunities and by advancing the development of road transport-based mobility.

A large, light blue arrow pointing to the right, serving as a timeline background for the 1960s, 1970s, and 1980s sections.

1960s

- 1962** Nissan started local assembly in Thailand.
- 1963** Mitsubishi started local production in the Philippines.
- 1964** Toyota started local production in Thailand.
- 1968** Toyota and Nissan started local production or assembly in Malaysia.
- 1966** Mitsubishi started local production in Thailand.
- 1969** Honda started automobile and motorcycle production in Malaysia.
- 1969** Nissan started local assembly in Indonesia.

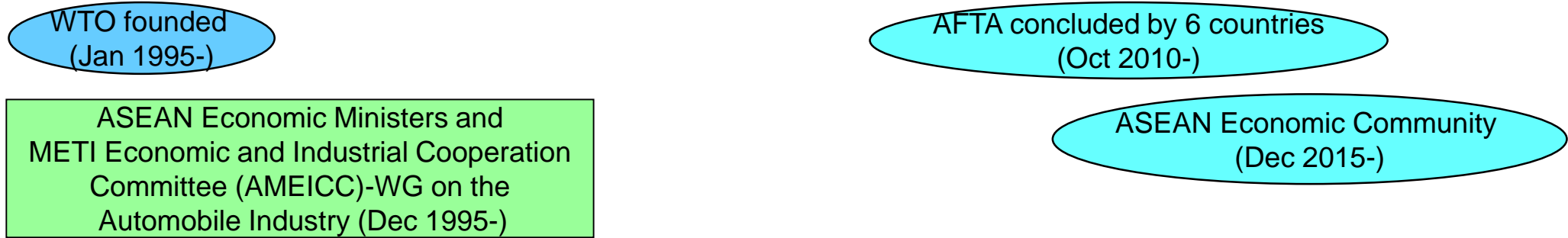
1970s

- 1971** Mazda started local passenger car assembly in Indonesia.
- 1972** Isuzu started local truck assembly in Indonesia.
- 1974** Mazda started local passenger car assembly in the Philippines.
- 1975** Mitsubishi, Honda, and Mazda started automobile production in Indonesia.
- 1975** Mazda started local passenger car assembly in Thailand.
- 1979** UD Trucks started production in Malaysia.

1980s

- 1980** Suzuki started automobile production in Thailand.
- 1984** Honda started automobile production in Thailand.
- 1987** Suzuki started automobile production in Malaysia.
- 1989** Toyota started production in the Philippines and in Thailand.

JAMA Members' Contributions to ASEAN [cnt'd.] + Japanese Government-Auto Industry (JAMA) Collaboration with ASEAN for Trade Liberalization



1990s

- 1992** Mazda started local production in Vietnam.
- 1994** Daihatsu started production in Malaysia.
- 1995** Mitsubishi opened a new factory in Vietnam.
- 1996** Suzuki started automobile and motorcycle production in Vietnam.
- 1996** Toyota started production in Vietnam.
- 1997** Nissan started production in the Philippines.
- 1997** Toyota started production in Thailand.

2000s

- 2003** Honda opened new automobile production factories in Indonesia.
- 2003** Toyota established a Toyota Technical Center in Thailand.
- 2004** Honda opened a new Automobile Technical Training Center in Thailand.
- 2008** Honda began production in Thailand.

2010s and onwards

- 2012** Mitsubishi opened its third factory in Thailand.
- 2013** Toyota opened a second production plant in Indonesia.
- 2015** Suzuki opened a new automobile assembly plant in Indonesia.
- 2016** Honda opened a new production plant in Thailand.
- 2017** Mitsubishi opened a new factory in Indonesia.
- 2017** Subaru opened a new production plant in Thailand.
- 2023** Hino opened a new plant in Thailand.

Achieving Carbon Neutrality in the Automobile Industry: ASEAN-Japan Collaboration/Japan Timelines

