



Japan's Mid- and Long-Term Mobility Vision & Cooperation between Europe and Japan

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Japan Automobile Manufacturers Association
European Office

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2. Japan's Mid- and Long-Term Mobility Vision
3. Cooperation between Europe and Japan

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JAMA Profile & Member Activities

JAMA Profile

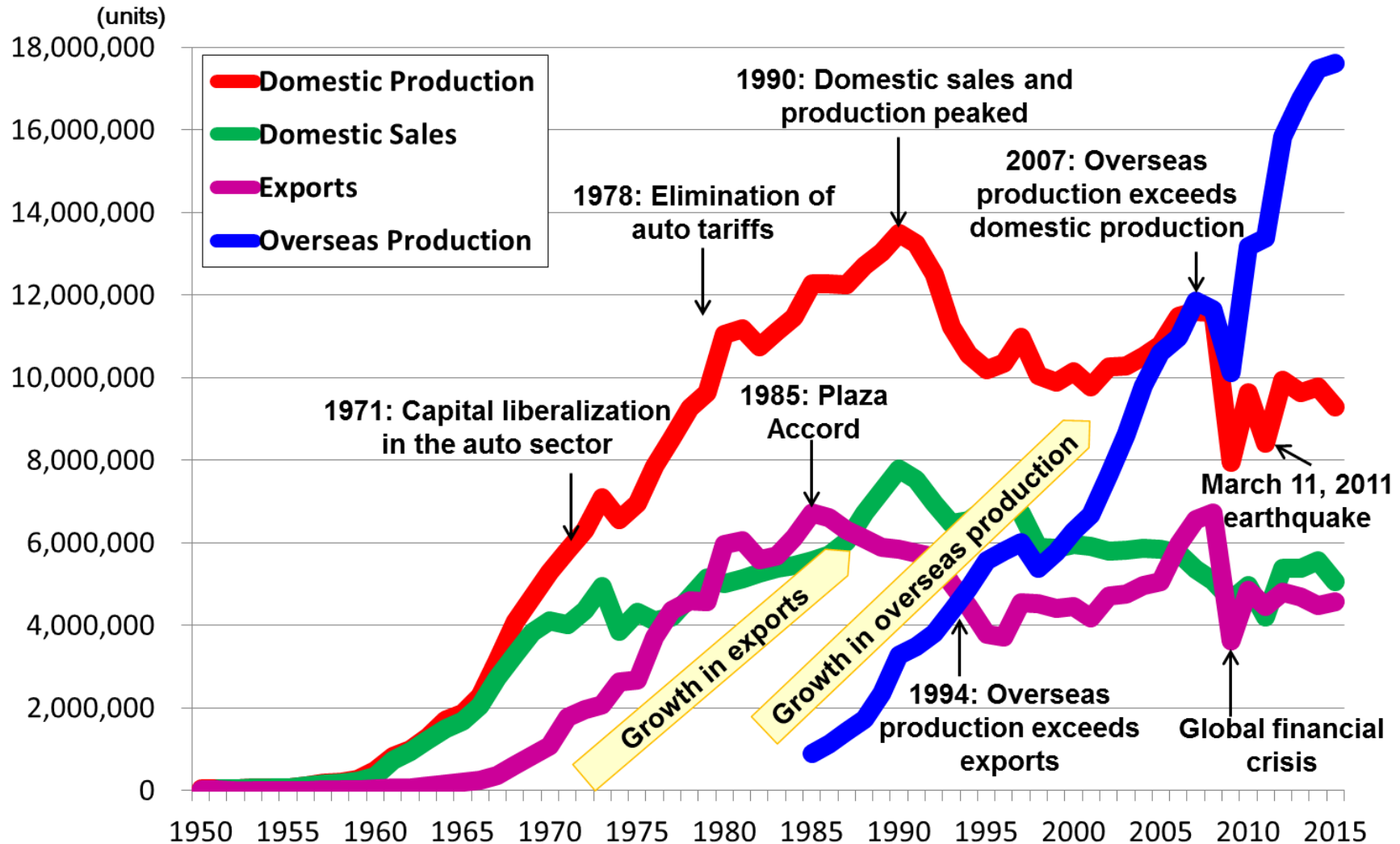
- Established on 3 April 1967.
- JAMA (Japan Automobile Manufacturers Association, Inc.) is a non-profit industry association comprising Japan's 14 manufacturers of passenger cars, trucks, buses and motorcycles.
- Its objective is to promote the sound development of the automobile industry and contribute to social and economic welfare.
- Its 14 member companies are:



Friend of JAMA: General Motors Japan, Ltd.

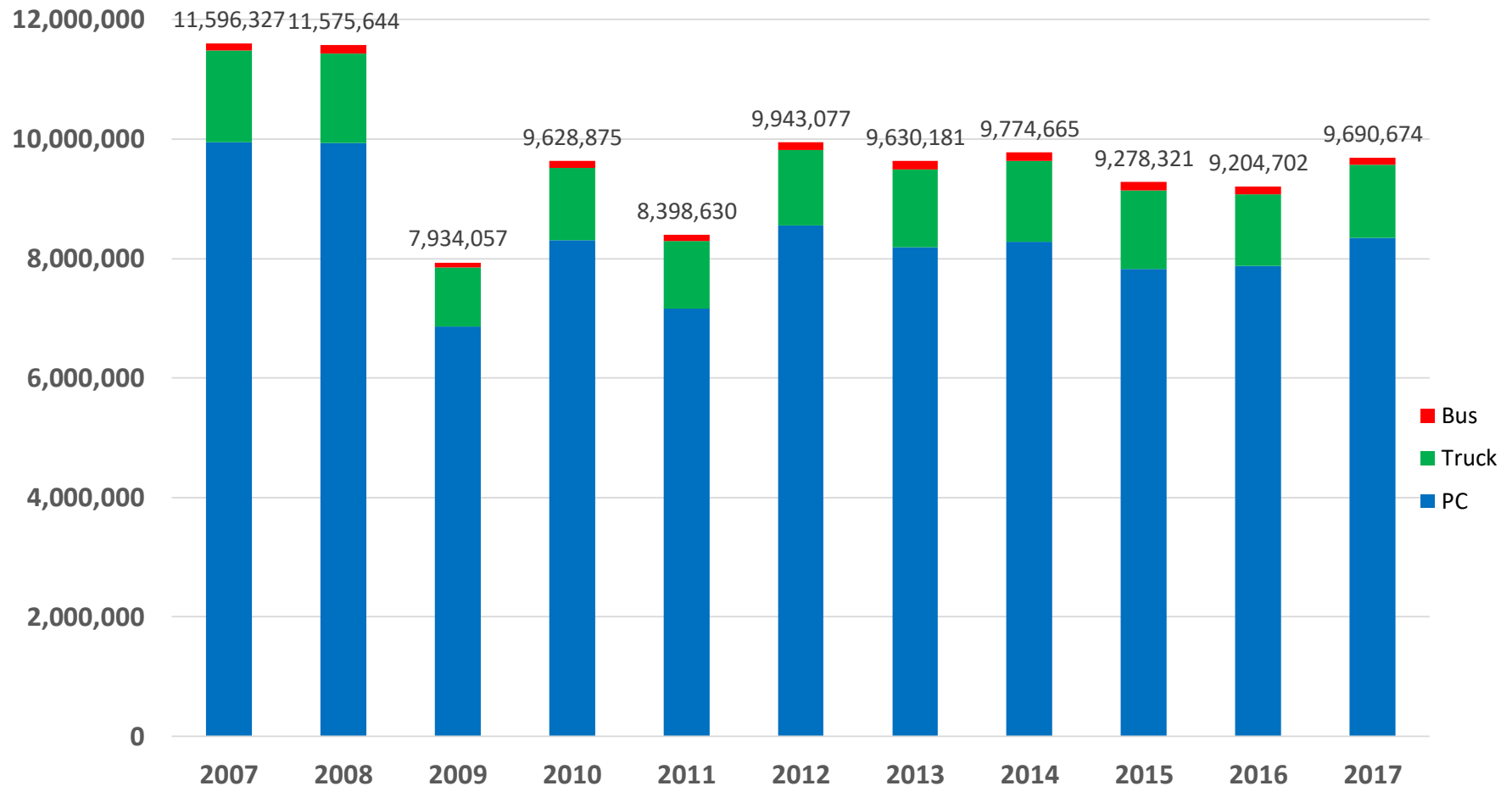
JAMA Profile & Member Activities

Historical Development of Japan's Automobile Industry



JAMA Profile & Member Activities

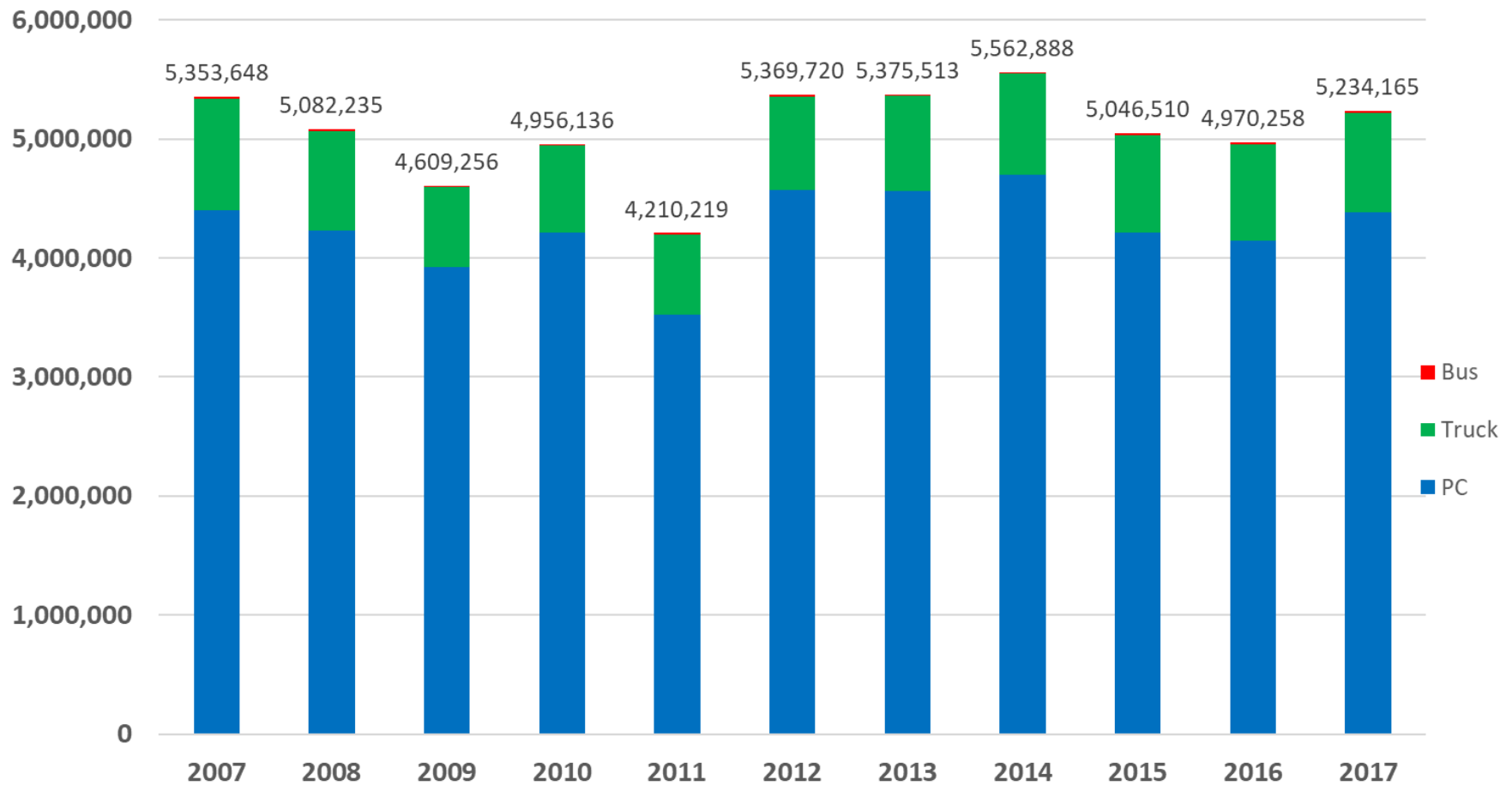
Vehicle Production in Japan



Source: JAMA

JAMA Profile & Member Activities

Vehicle Sales in Japan

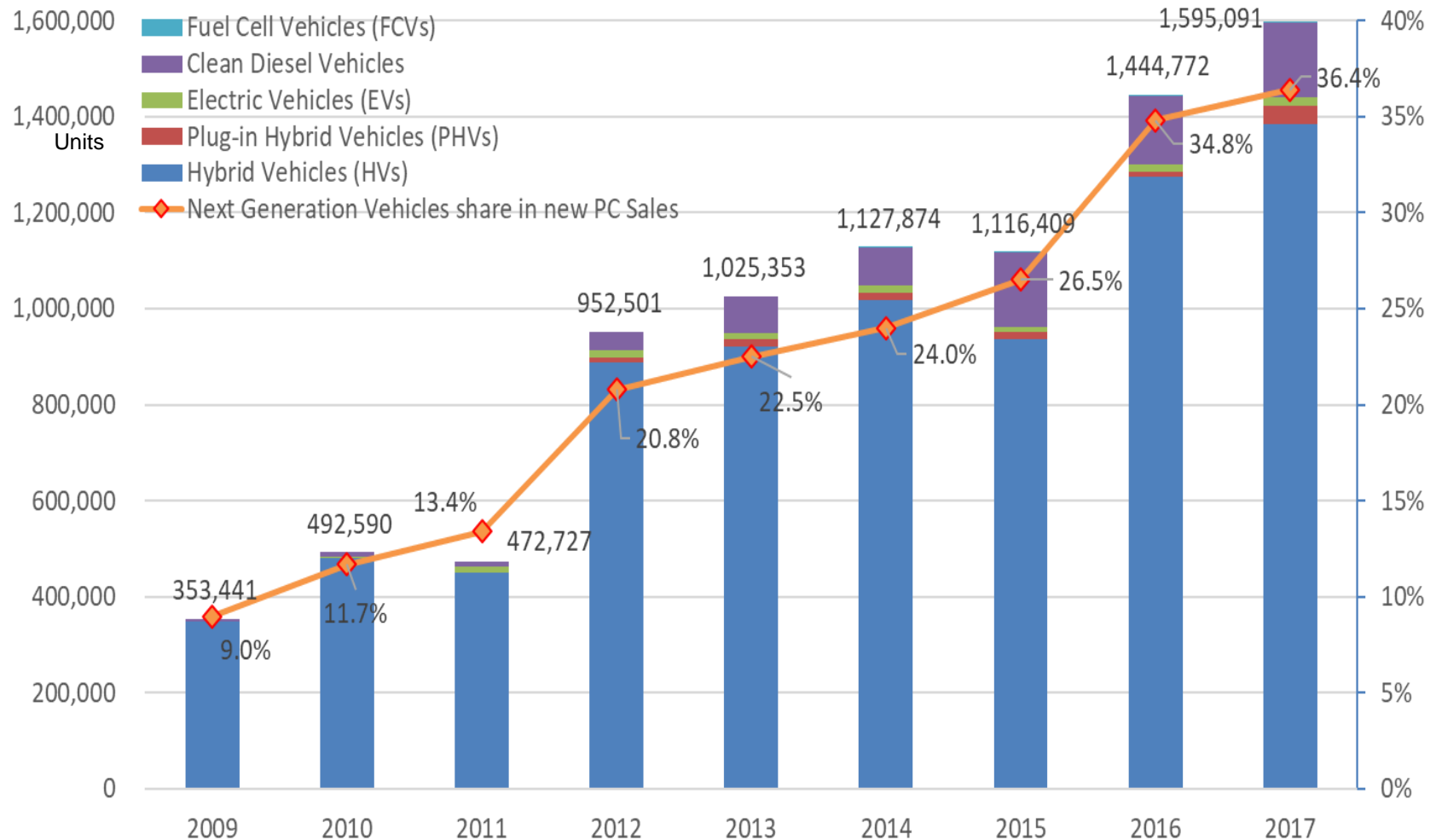


Source: JAMA

JAMA Profile & Member Activities

Characteristics of Japan's Market

■ In 2017 next-generation vehicles accounted for more than 35% of new passenger car registrations.



Note: "Hybrid Vehicles" includes hybrid minicars as of 2017.

Source: Japan Automobile Manufacturers Association

JAMA Profile & Member Activities

Contributions in the EU

- We are working towards the goal of comprehensively sustainable mobility through contributions to social and economic welfare in Europe.

No. of
production facilities



14 in seven
EU countries

No. of
R&D and design facilities



16 in five
EU countries

No. of
vehicles produced



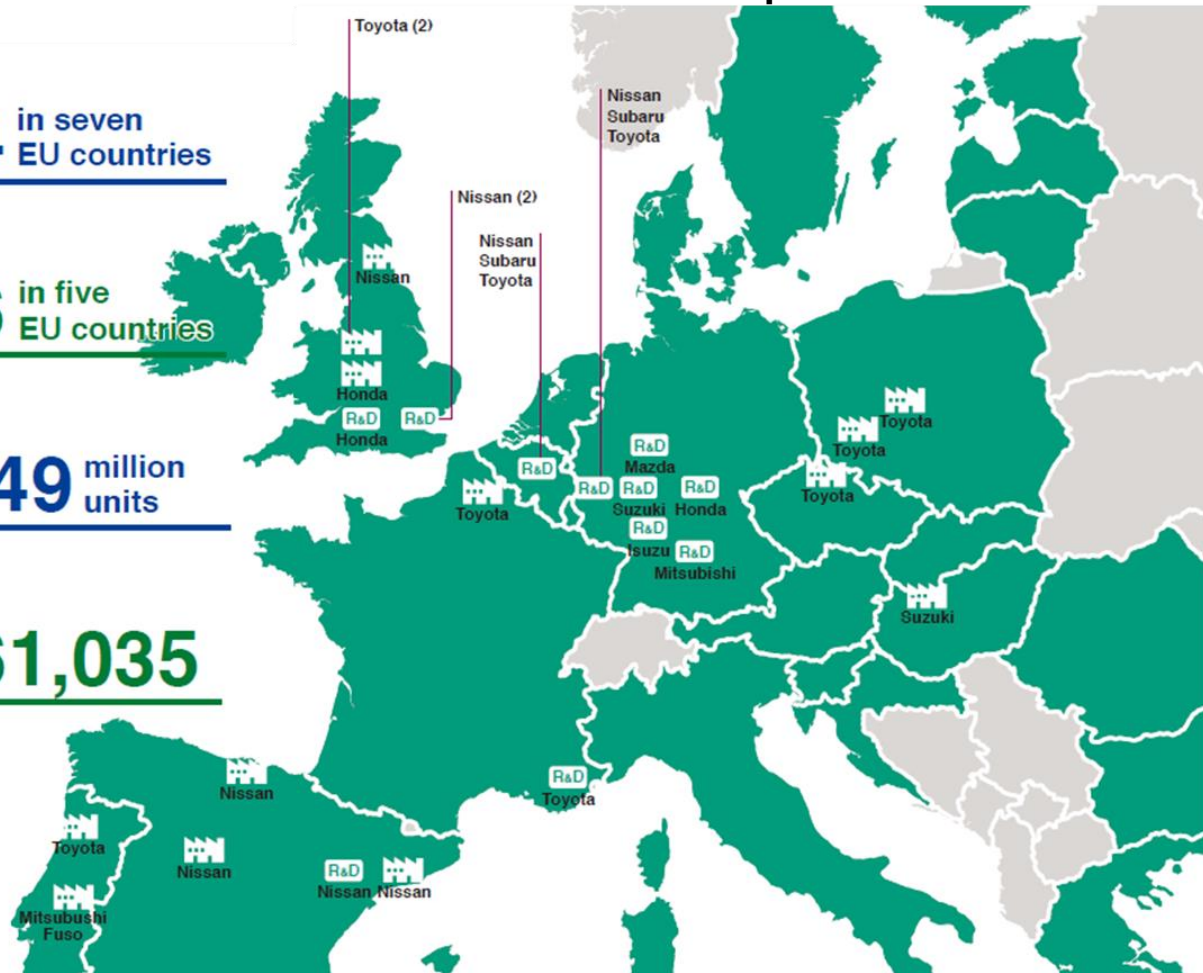
1.49 million
units

No. of
persons employed



161,035

-32,120 persons employed directly
(30,081 in production, 2,039 in R&D)
-128,915 persons employed indirectly
(in related distribution, sales and
other services)



(As of December 2016)

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Mobility to date

Mobility has brought PLEASURE to our lives.



Farther



More fun



Faster



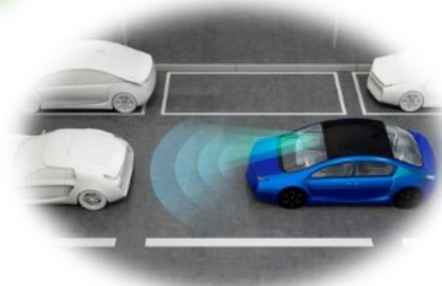
More comfortable



More convenient



Safer



Cleaner



Societal trends impacting mobility

Now is the time to move on mobility's future.

Aging society



E-commerce



Urbanization



Big data



Climate change



IoT



Resources/Energy issues



AI



**Societal trends mean that
road transport is
facing a major transition.**

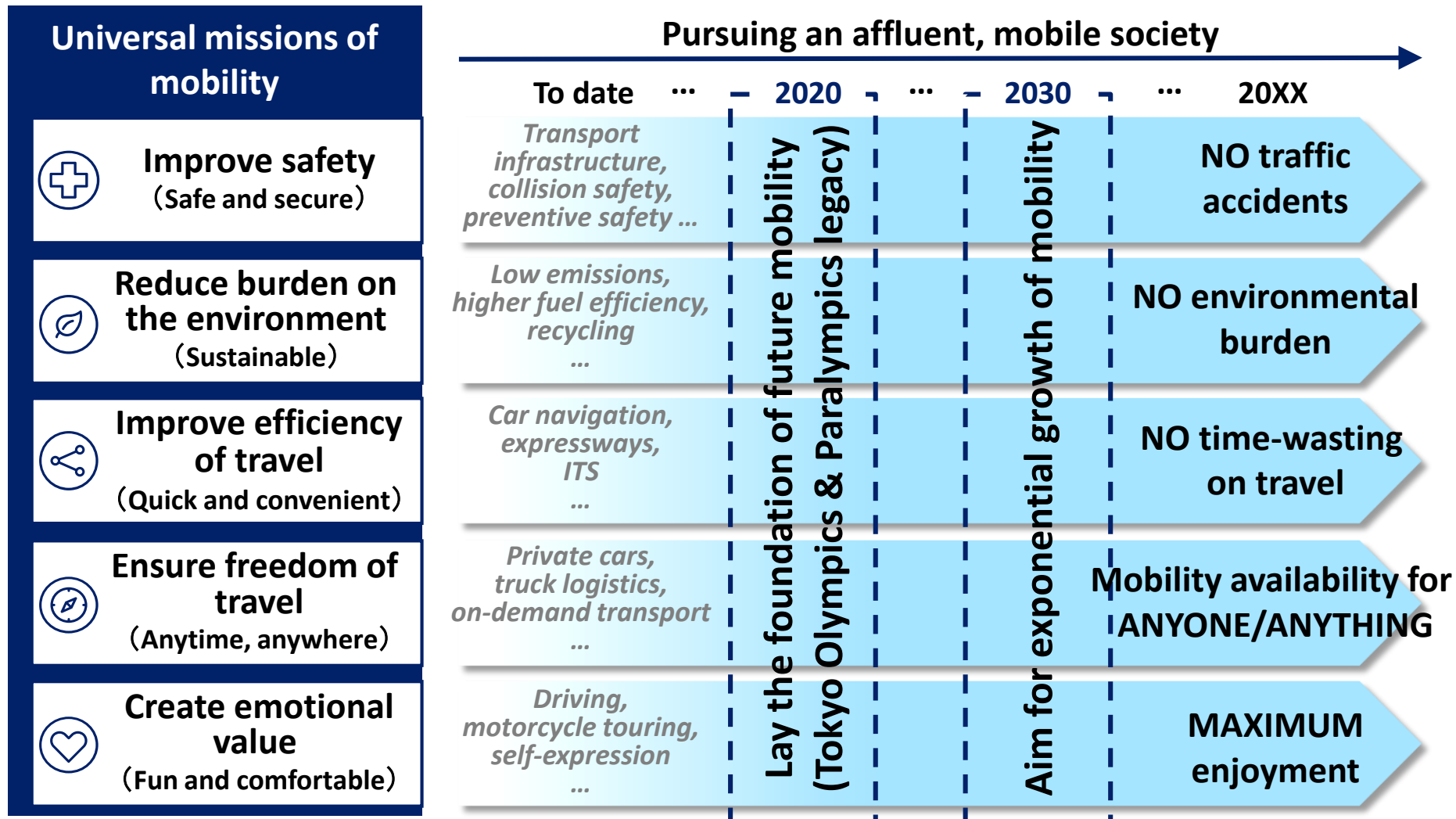
**As society is at an inflection point,
new technologies and services are emerging.**

⋮

⋮





JAMA's approach

We will continue to bring enjoyment and convenience to daily life through advances in mobility.



Japan hit by global megatrends ahead of other countries

Future mobility solutions developed in Japan, a “frontier of social issues,” will contribute to solving global issues.

Global trends	 JP	 US	 DE	 CN
	More challenging environment than other countries			
Aging society	% of population over 65 in 2030 (estimate) ¹			
	32% >>	20%	27%	16%
Urbanization Societal issues resulting from overpopulation (traffic congestion, air pollution...)	Urbanization rate in 2030 (estimate) ²			
	73% >>	61%	22%	45%
Climate change	Annual greenhouse gas emissions per person in 2030 (estimate) ³			
	8.7t <<	14t	9.2t	25t
Energy sustainability Energy saving, renewable energy	Energy self-sufficiency rate in 2030 ⁴			
	24% (2014: 6%) <<	82% (2014: 79%)	45% (2014: 33%)	— (2014: 82%)

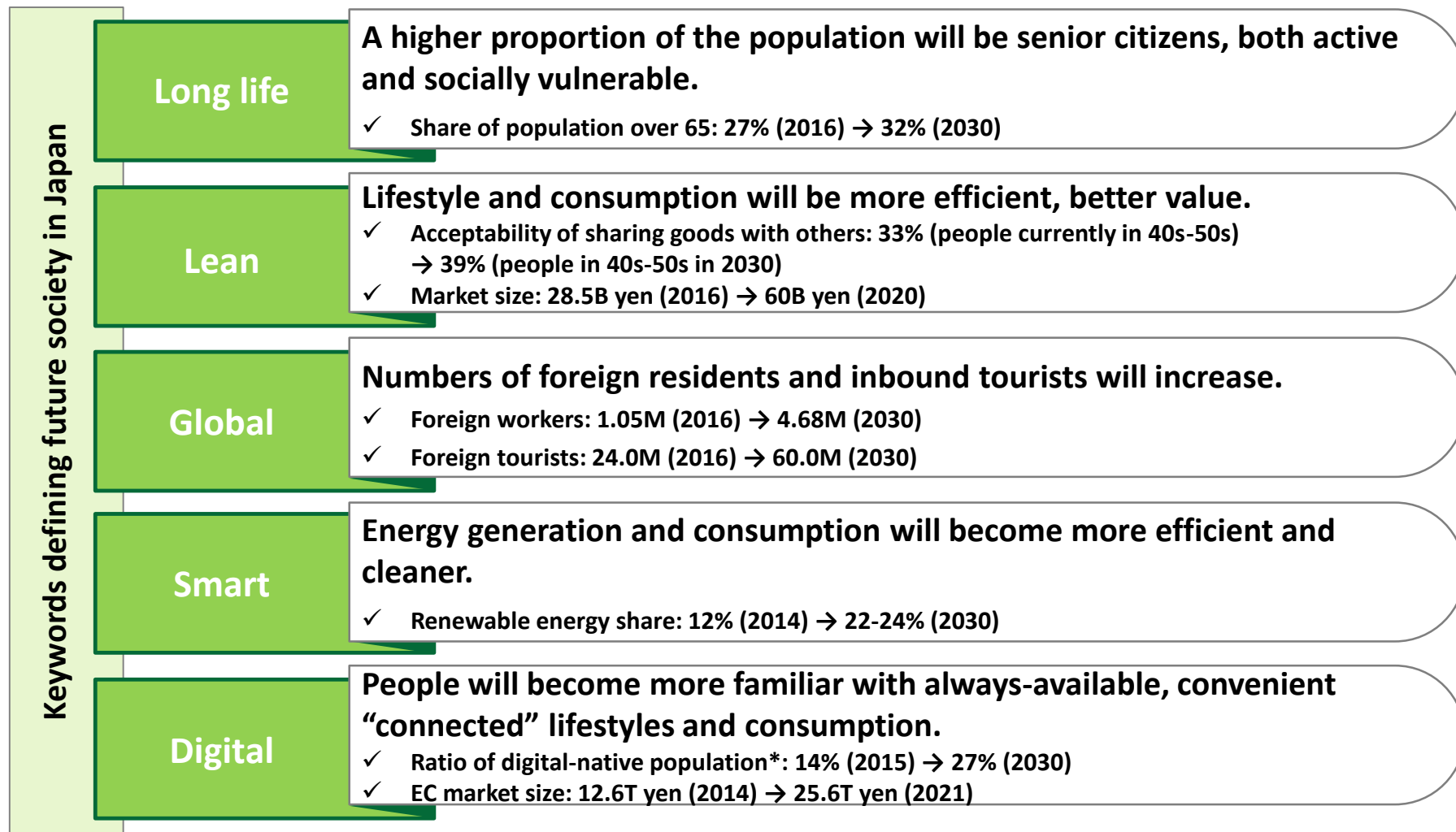
1: Proportion of people aged 65 or over in the total population. 2: In “World Urbanization Prospects 2014” (UN), settlements with a population of 0.3 million or more are defined as cities.

3: Each country’s greenhouse gas emissions target value in 2030 included in the Paris Agreement (US: Annualized 2025 target value) is divided by EU’s population estimate in each country in 2030.

4: Japan: Based on gov’t target for 2030; US: Based on predictive value of EIA (Energy Information Administration); DE: Based on gov’t target for 2050.

Future society in Japan

Japanese values, lifestyles will undergo further change.



*Defined as population born after 1999, when mobile phones with Internet connection were launched in Japan.

Future land usage and transport systems in Japan

Land usage and transport systems vary from area to area.

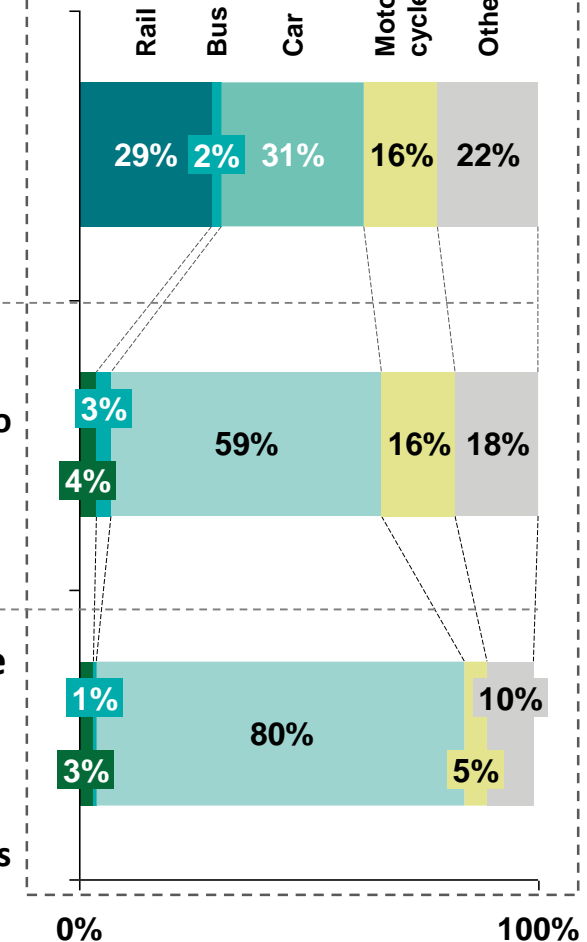
Metropolitan areas

- Expanding megacities
 - Further development of mega agglomerations
 - Highly urbanized environments with multimodal transport systems

Provincial hubs and rural areas

- Provincial hubs, where urban functions are concentrated
 - The concentration of urban functions will accelerate to provide efficient public services in spite of population declines and reduced financial circumstances.
 - Car-oriented, with public transport developed to certain levels as well
- Smaller towns and rural villages, located outside or well beyond provincial cities
 - Around provincial hubs undergoing urban function concentration, sparsely populated areas remain.
 - Car-oriented, with extremely limited transport options

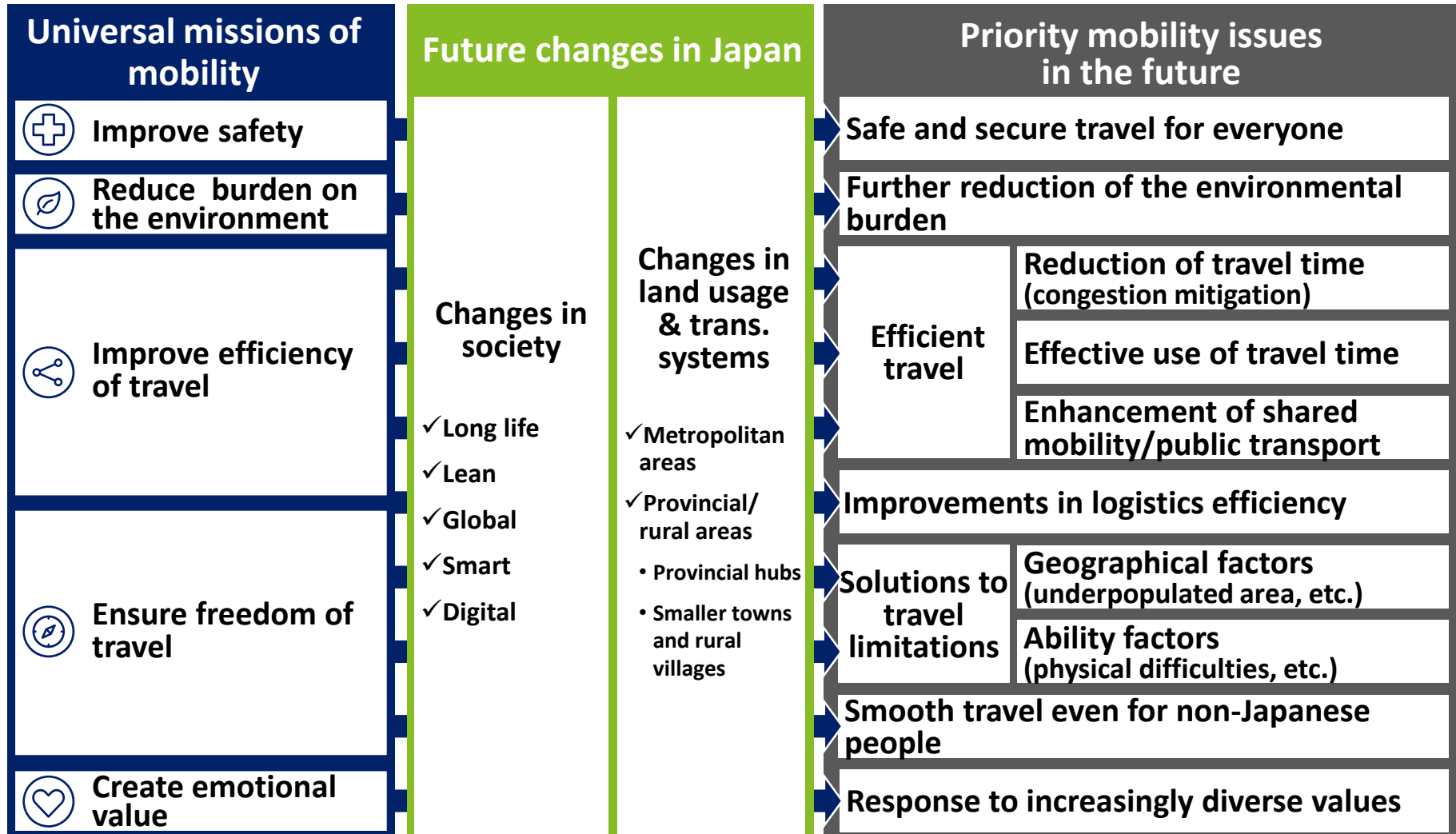
Rates of use of transport means in 2015



Note: Metropolitan areas: Three mega agglomerations that were the targets of MLIT's "Nationwide Person-Trip Survey"; Provincial hubs: Local urban areas excluding hilly and mountainous areas; Rural areas: Hilly and mountainous areas.

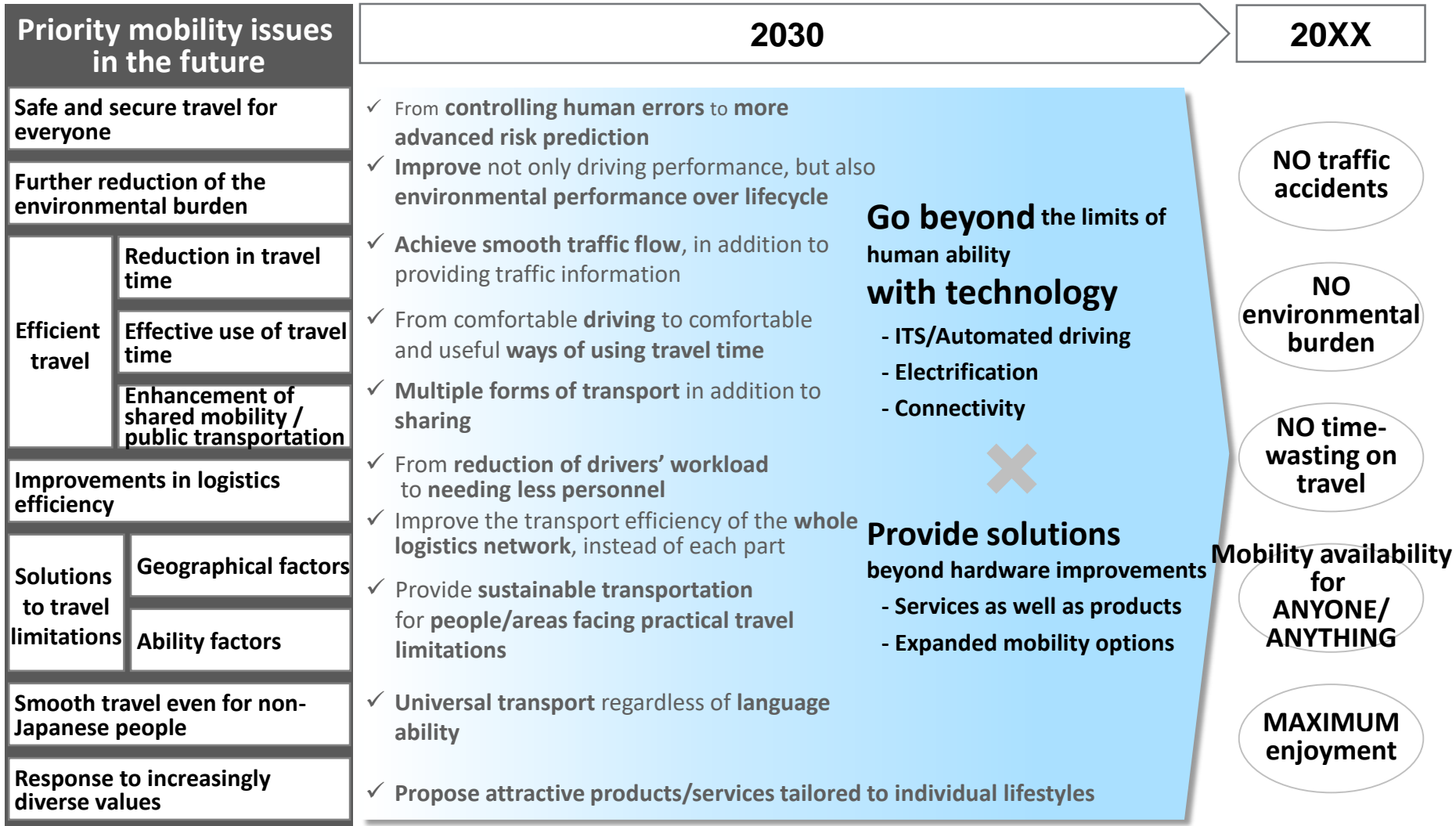
Priority issues for future mobility

Mobility issues will arise as a result of changes in society, land usage, and transportation availability.



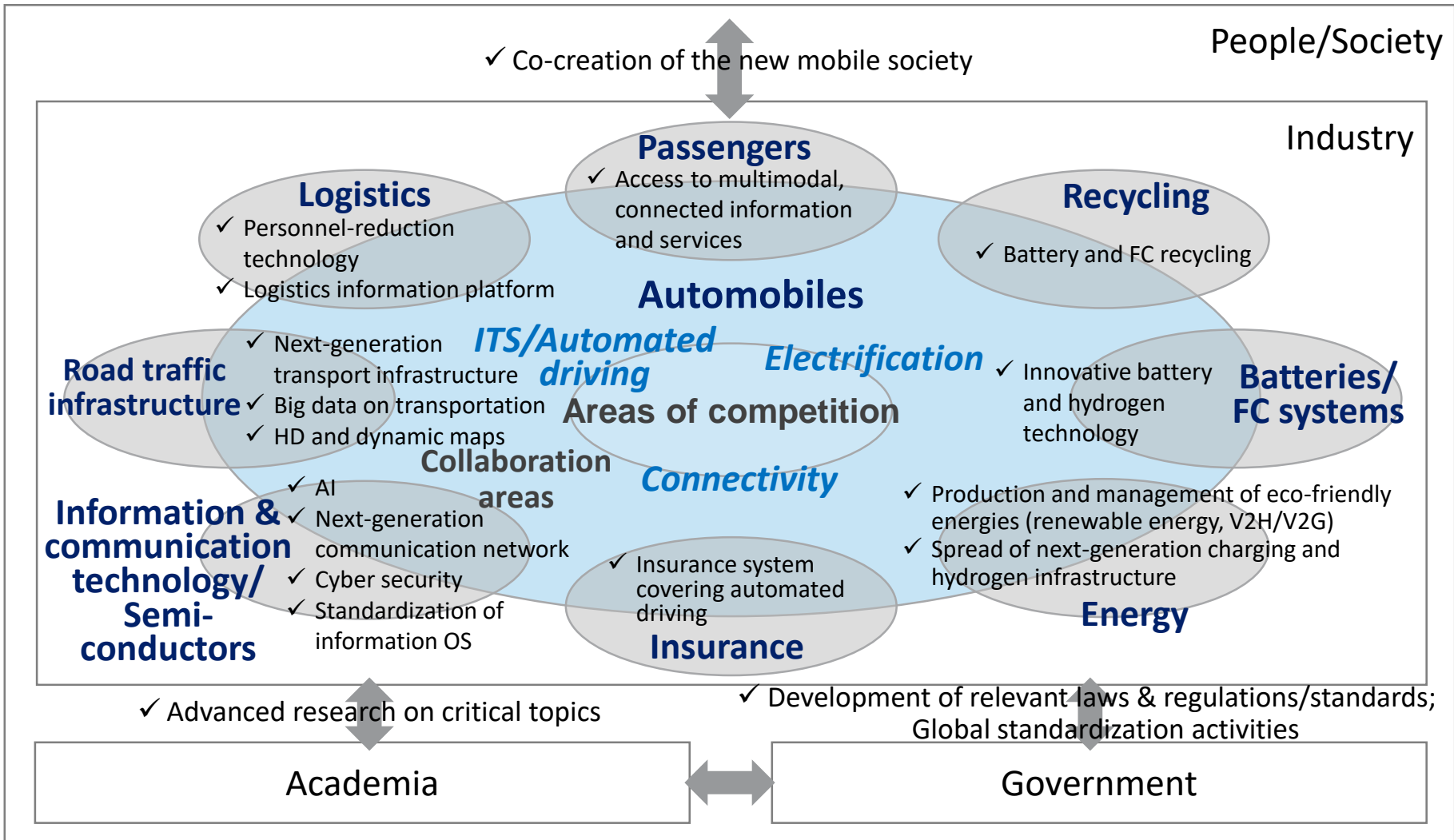
Potential of mobility by 2030

Continued enjoyment and convenience in mobility, with 2030 as the milestone



An ecosystem for achieving 2030 mobility goals

An intra-industry collaborative approach, also involving external stakeholders, to building future mobility



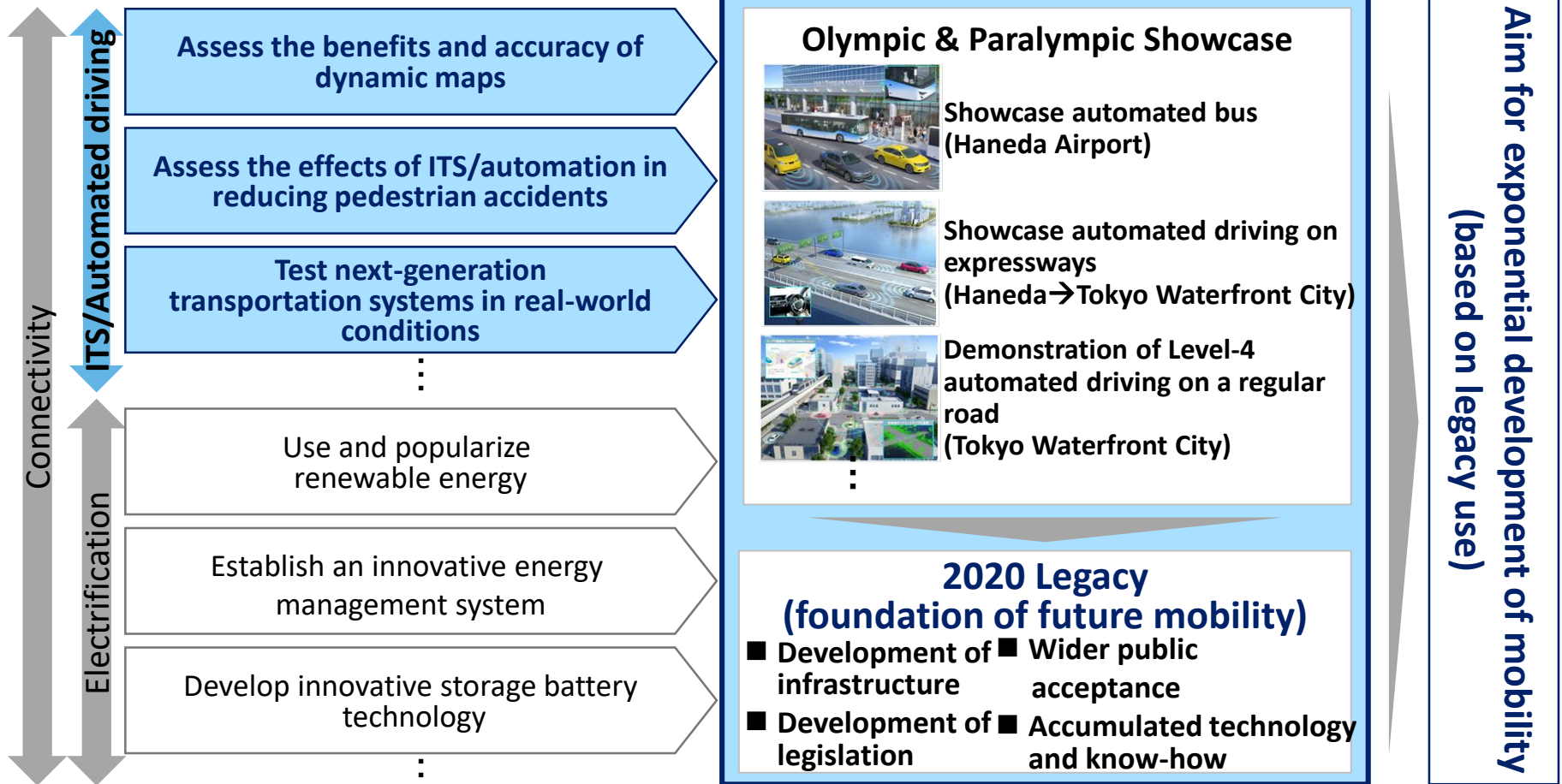
2020 Olympics and Paralympics legacy

A post-2020 legacy to serve as a stepping stone in achieving future mobility

Collaborative industry/academia/government projects until 2020

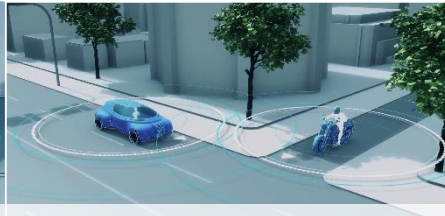
2020

2030



Envisioning mobility in Japan in 2030

Exponential development in mobility systems by 2030



A world where everyone feels safe and secure



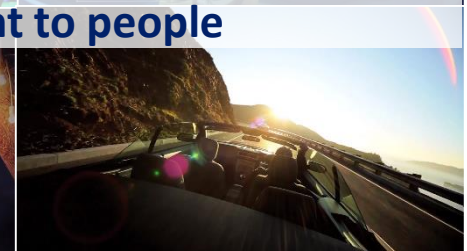
A world filled with smiles and greenery



A world where vehicles, people, and goods circulate freely



A world where mobile society brings enjoyment to people



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Cooperation between Europe and Japan

Earliest implementation of the EU-Japan EPA

- EU and Japan are principal partners who share the same values in the promotion of human rights, democracy, and the rule of law.
- The EPA will create a huge economic zone, with 600 million people and approximately 30 percent of world GDP.
- Improvements will be made in market access and rules (esp. regulatory cooperation).



Cooperation between Europe and Japan

Cooperation at Industry Level

■ ACEA-JAMA Consultation Meetings

- 18 bilateral talks have been held since the 1990s.
- ACEA and JAMA have been working together on many issues of common interest.



European
Automobile
Manufacturers
Association



JAMA

JAPAN AUTOMOBILE MANUFACTURERS ASSOCIATION, INC.

一般社団法人 日本自動車工業会

■ VDA-JAMA Technical Exchange Meetings

- 2 meetings have been held since 2015; the 3rd to be held in July @ Tokyo
- Topics: Standardization, Automated driving, Electric vehicles, Hydrogen (FCVs, infrastructure etc.), Data access & Data security

VDA

Verband der
Automobilindustrie



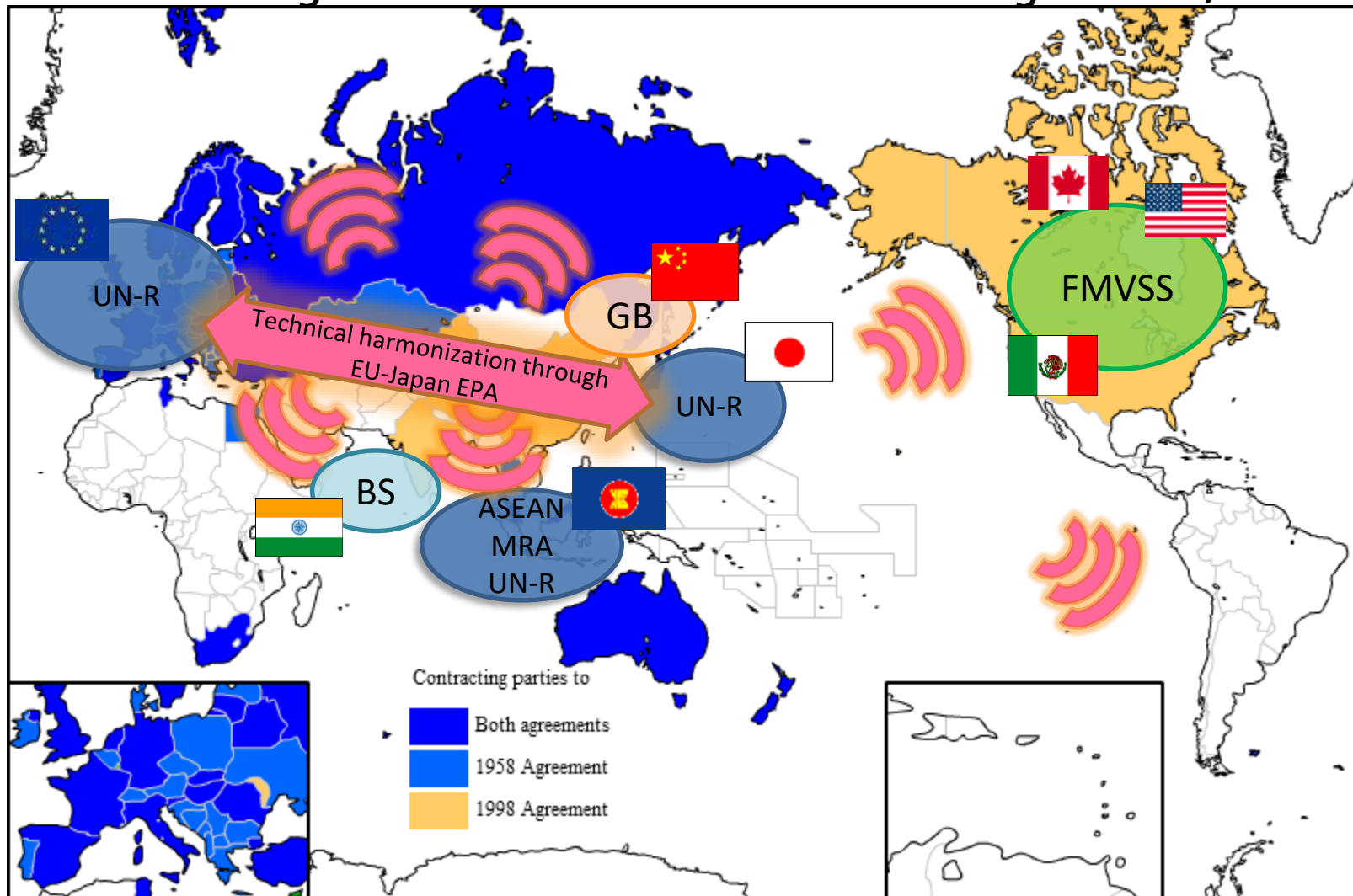
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Cooperation between Europe and Japan Regulatory cooperation

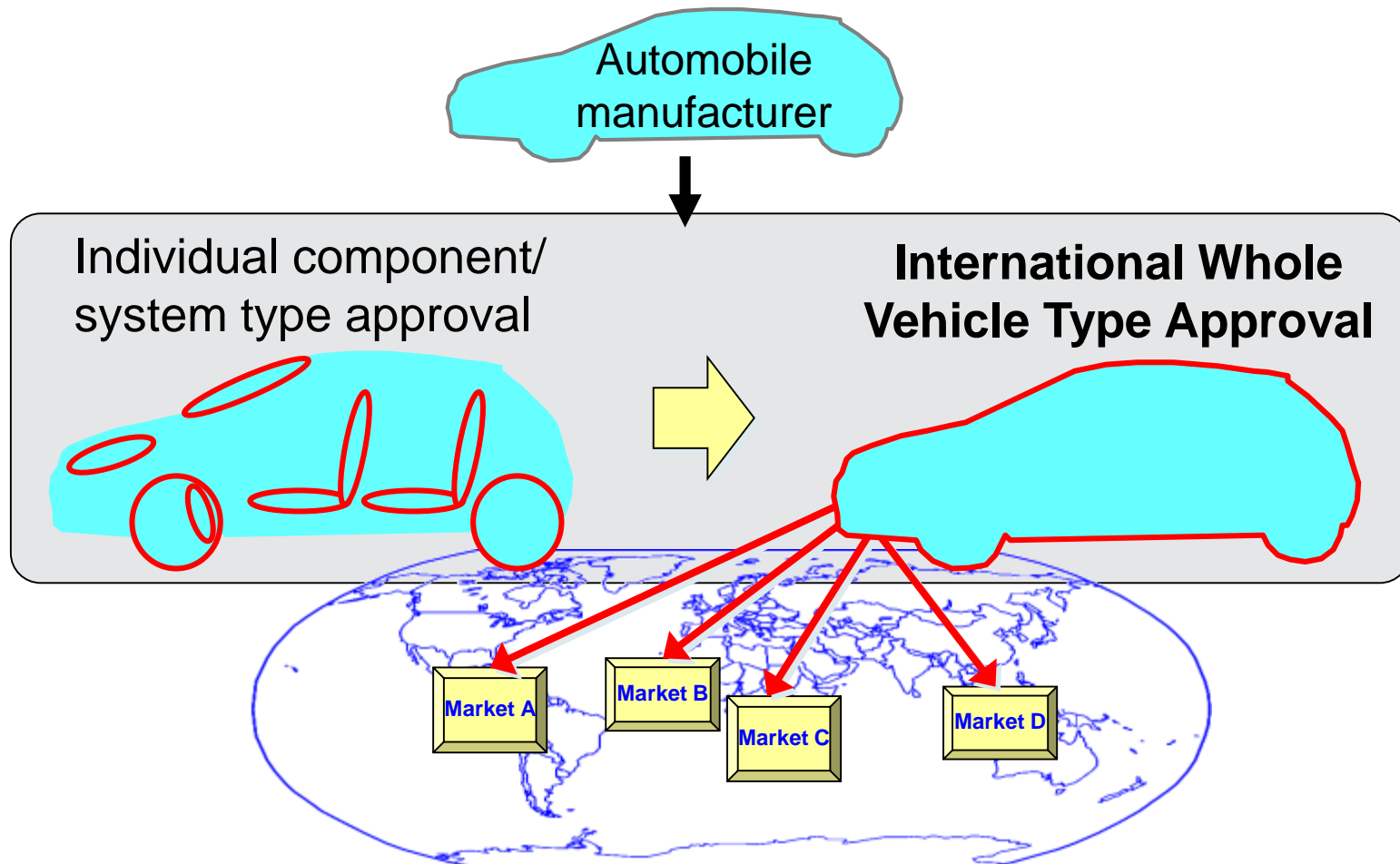
- EU-Japan EPA will facilitate harmonization of regulations/
mutual recognition of certification under 1958 Agreement/UN-R



Cooperation between Europe and Japan

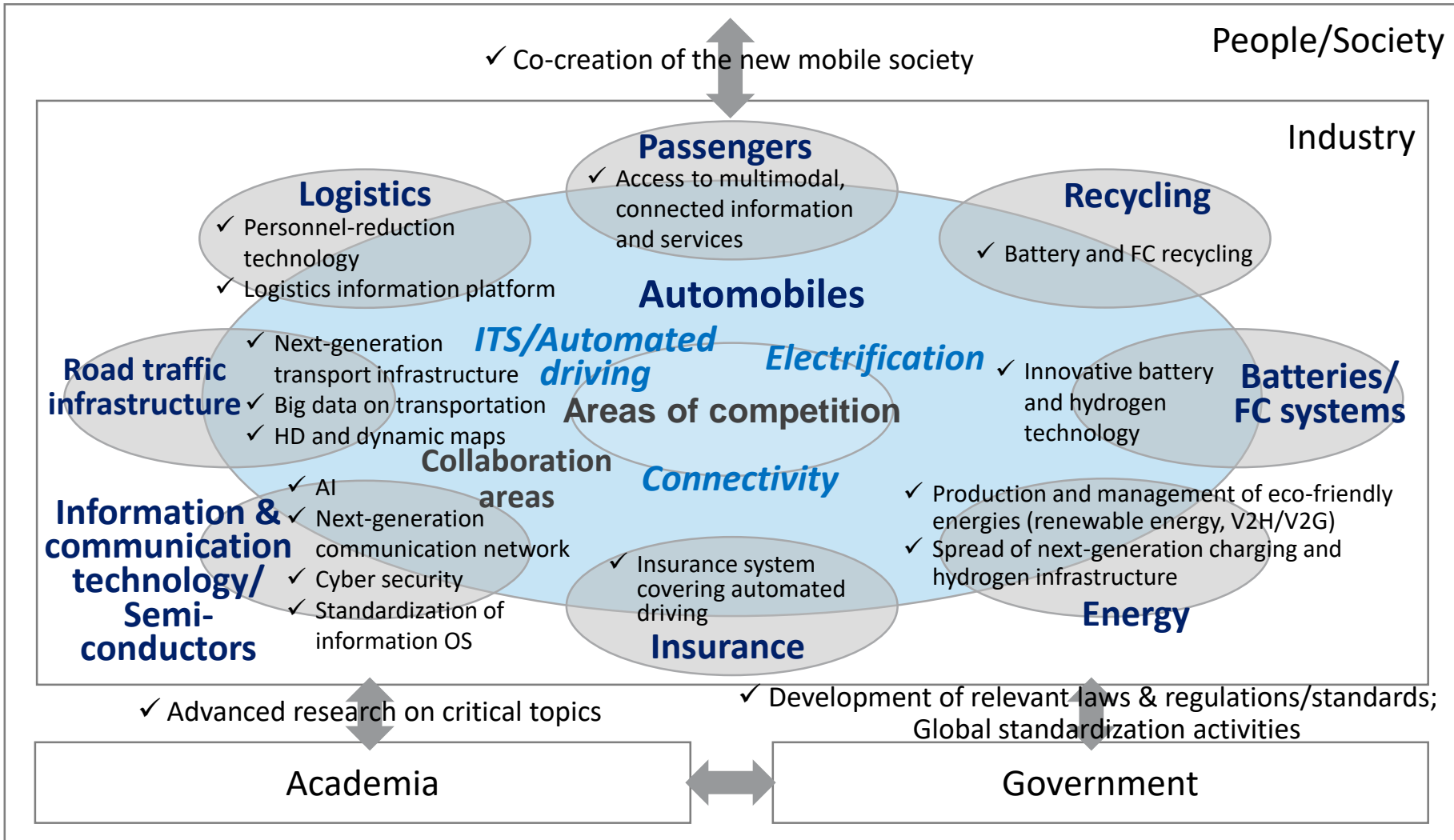
Regulatory cooperation

■ International Whole Vehicle Type Approval (IWVTA)



Cooperation between Europe and Japan

Beyond the Motor & Beyond Borders



Danke schön!

Thank you very much!

ありがとうございました。