

Chairman's Message

The spring of 2022, when former President Arima assumed the presidency of JAPIA, coincided with the timing when society and the economy, which had been stagnant due to COVID-19, began to move rapidly and geopolitical risks surfaced at the same time. In the two years since then, the environment surrounding the automobile and automotive parts industry has changed dramatically. For these two years, JAPIA had been promoting its activities under the four major themes of improvement of subcontracting transactions, GX (CN), DX, and resilience. I believe that this theme setting was an appropriate selection based on both the pressing issues at the time and the recognition of risks and challenges for the future.

With regard to the optimization of transactions, we have been able to proceed with "activities to straighten up our collars (act seriously to shape up)" from the standpoint of the client with the cooperation of member companies, and as a result, steady progress in shifting prices for costs of raw materials, energy, and others has been achieved.

On the other hand, it continues to be a major challenge to spread the shifting of labor costs to prices throughout the industry. In addition, since the end of last year, several companies in the automobile and auto parts industry have received recommendations from Japan Fair Trade Commission for violations of the Subcontract Act, and I believe it is necessary for the industry to further promote "activities to straighten up our collars" in a sincere manner. We will continue to make efforts to realize the improvement of subcontracting transactions in order to maintain and strengthen the competitiveness of the entire supply chain.

For CN, seven activity support tools were provided, including the "CN Activity List for Practical Use," and for DX, a seminar on the use of digital technology was held. As for resilience, an evacuation manual, a withdrawal flow, and a collection of sensitive technical knowledge were provided, and the results of activities under each of the four major themes are steadily taking shape. We will continue to enhance our ability to disseminate the results of these activities throughout the entire supply chain, and we will strive to enhance the content of our activities in line with the needs of the member companies.

In 2023, four more priority themes have been added. These are Logistics, Circular Economy (CE), Open Innovation (OI), and the Foreign Technical Internship System. The speed of change in the environment surrounding JAPIA is becoming faster and faster. In April of this

year, a revision of laws related to logistics went into effect, and a new bill on the foreign technical internship system was approved by the Cabinet. There is no time to spare for these activities. CE and OI are also important themes that the automotive and auto parts industry cannot avoid.

In FY2024, we will continue to work on these eight priority themes in broad collaboration and cooperation with the Japan Automobile Manufacturers Association, the Ministry of Economy, Trade and Industry, material industry related associations, Confederation of Japan Automobile Workers' Unions, and Japanese Association of Metal, Machinery, and Manufacturing workers.

In addition to an overview of JAPIA's major activities during the past fiscal year, this publication presents the contribution of the auto parts industry to the Japanese economy from the past to the present with statistical data. Under the drastically changing social and economic circumstances in Japan, the Japanese automobile and auto parts industry is approaching a turning point. We will continue to work strongly and flexibly on our key themes so that a bright future can be seen beyond the corner and the entire supply chain can become stronger.

Over the next two years, I am determined to work diligently and honestly to make JAPIA a place for everyone, so that JAPIA member companies will be happy to be members of JAPIA, and so that everyone outside of JAPIA will be happy that JAPIA exists.

May 2024

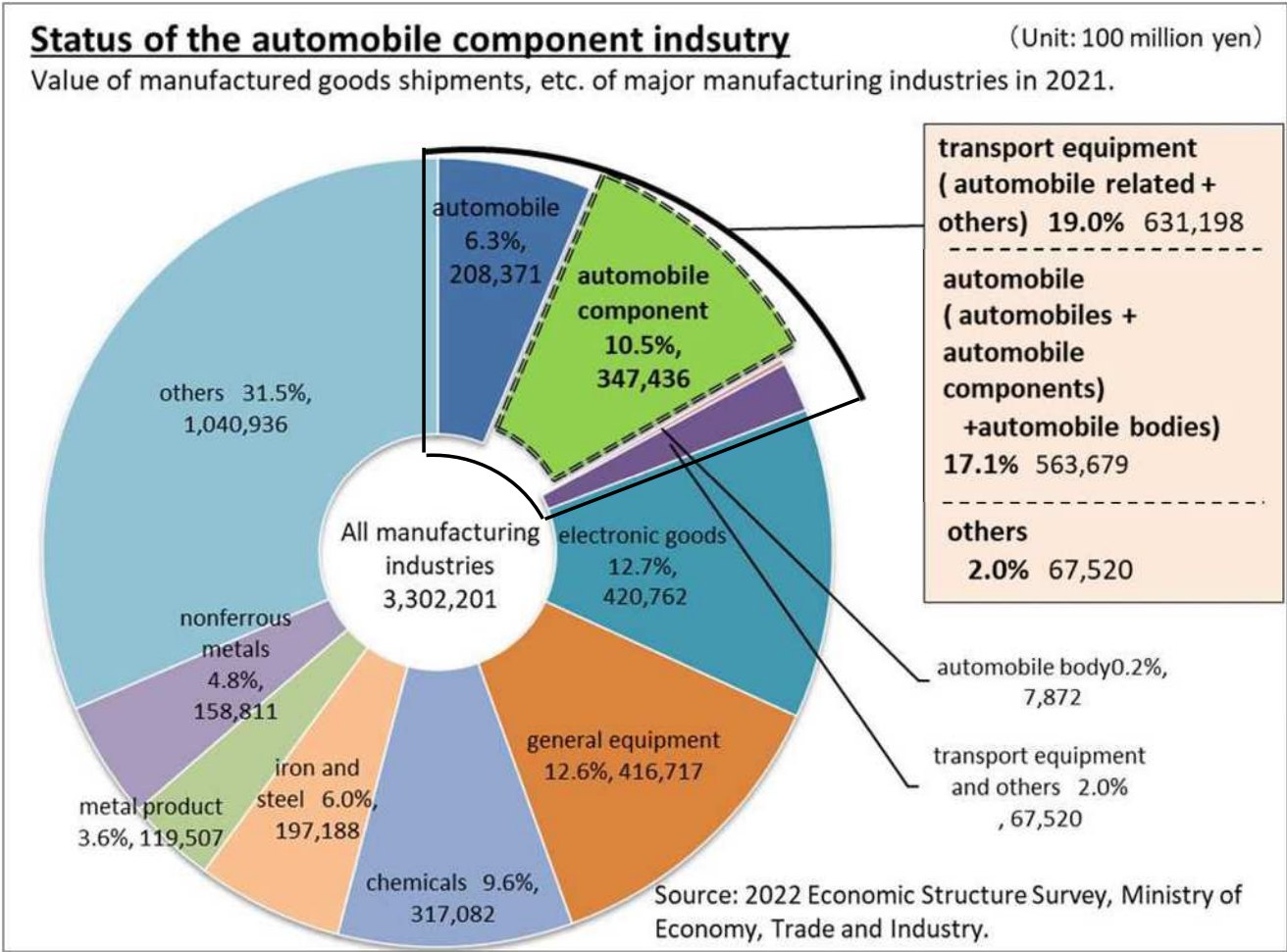
Japan Auto Parts Industries Association

Chairman, Takashi Kayamoto

Status of the automobile component industry

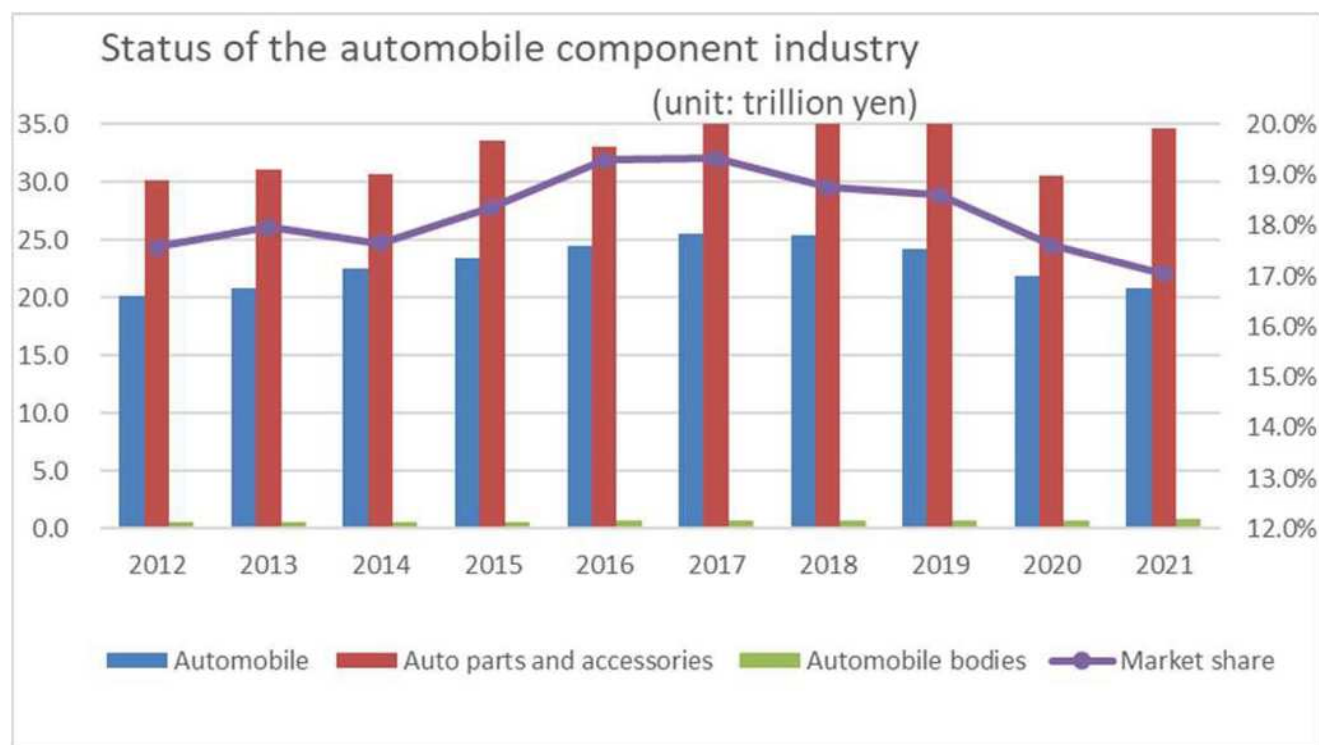
According to "2022 Economic Structure Survey" conducted by Ministry of Economy, Trade and Industry, the value of automobile-related shipments was JPY 56.3 trillion (17.1% of total manufacturing industry), of which automobiles accounted for JPY 20.8 trillion (6.3%) and automobile components for JPY 34.7 trillion (10.5%).

In addition to the above, automobile components include springs, glass, tires, screws and bolts, which are recorded in other statistical categories, therefore, the value of shipments of automobile components in the broad sense is larger than the figures shown here.



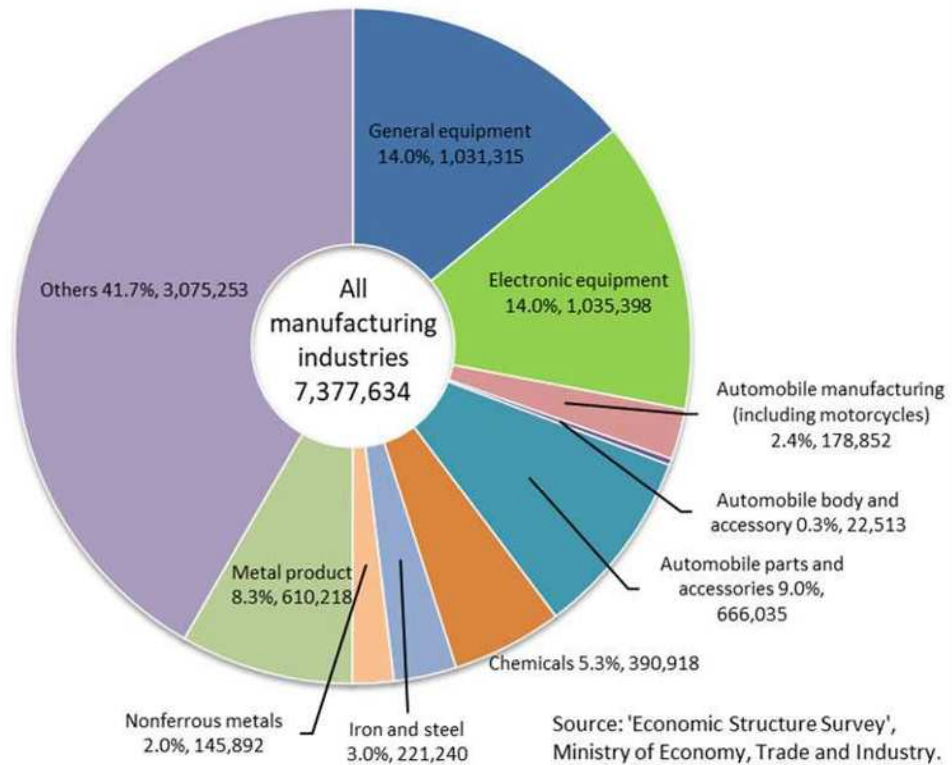
Status of the automobile component industry (Unit: trillion yen)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Automobile	20.1	20.9	22.6	23.5	24.5	25.6	25.4	24.3	21.9	20.8
Automobile parts and accessories	30.1	31.1	30.7	33.6	33.1	35	36.1	35	30.6	34.7
Automobile bodies	0.5	0.5	0.6	0.6	0.7	0.7	0.7	0.7	0.7	0.8
Total	50.8	52.5	53.9	57.7	58.3	61.3	62.2	60	53.2	56.3
Market share	17.6%	18.0%	17.7%	18.4%	19.3%	19.3%	18.8%	18.6%	17.6%	17.1%
All manufacturing industries	288.7	292.1	305.1	313.9	302.1	317.2	331.8	322.5	302	330.2

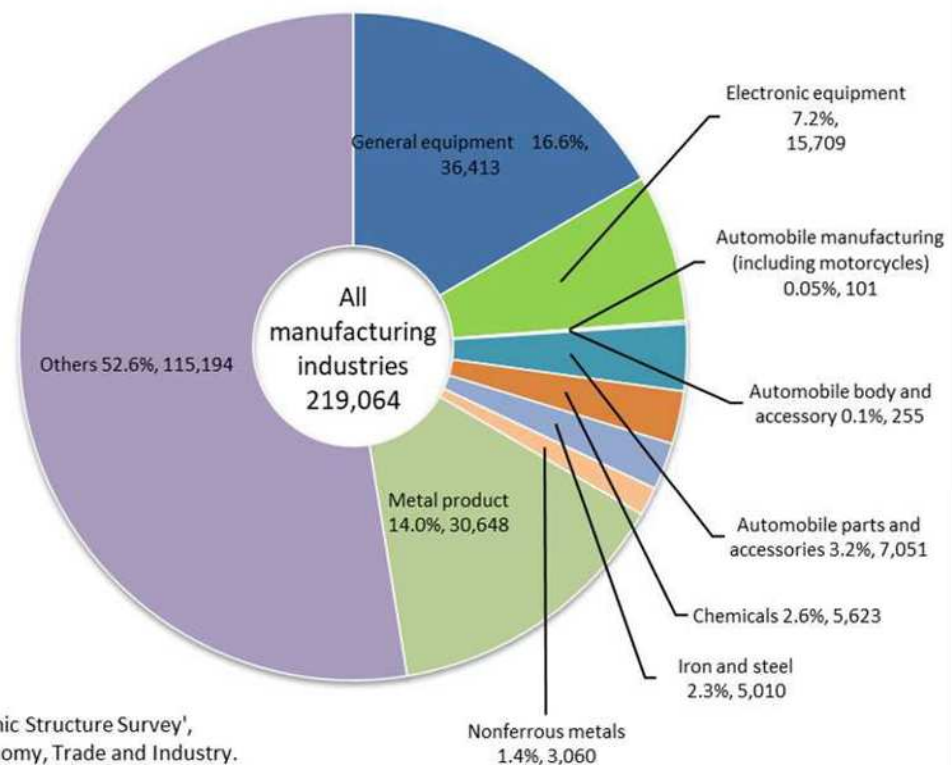


Status of the automobile component industry
(Number of employees)

(Unit: persons)



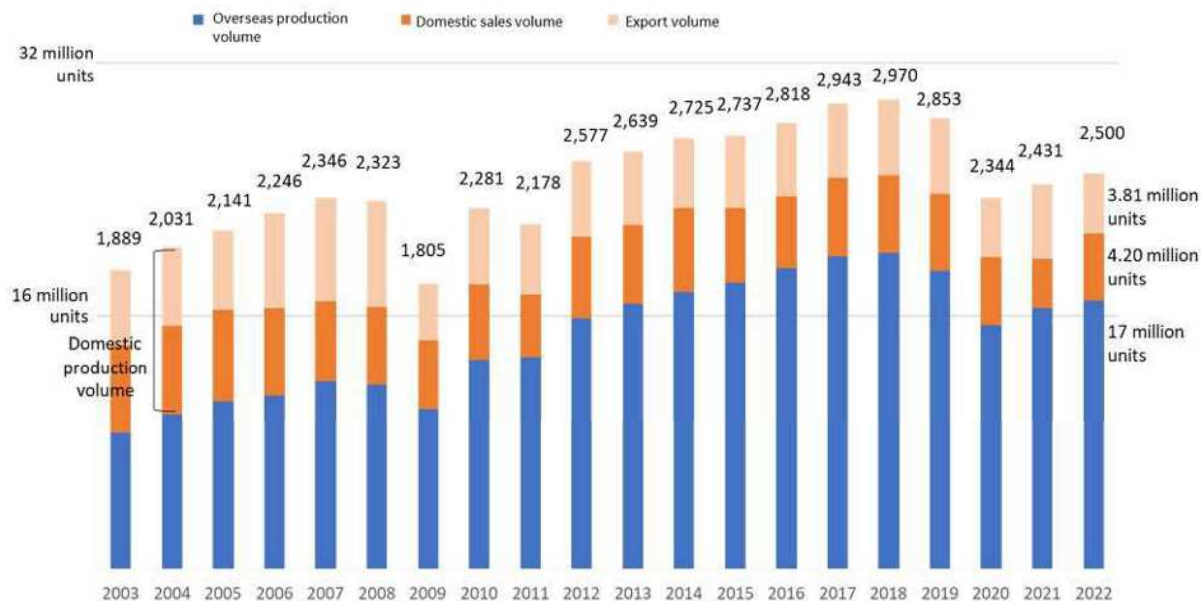
Status of the automobile component industry
(Number of offices)



Overseas expansion of Automobile Parts Manufacturers

■Production volume by Japanese automobile manufacturers

Overseas production increased for the second consecutive year (+3.3% to 17 million units).
Domestic production volume remained almost flat.



Data: JAMA

■Changes in the number of overseas subsidiaries with production function of JAPIA members (Worldwide except Japan)

Decreased for the fourth consecutive year after peaking in 2018, down 68 from the previous year.
Due to a review of the membership system, there are changes in the companies surveyed. For companies responded for the second consecutive year; -4.

China; -6 (new registrations +9 to cope with EVs, business integration/dissolution and withdrawals -15 related to mainly ICE vehicle parts.

Europe; -5 (UK -3, Russia -4, Albania +1 (first entry)

Others; new entries in Guatemala and Tunisia



Data: JAPIA Research on Overseas Operations by Member Companies FY2022 (Mexico is included in North America)

Overseas subsidiaries with production function, Top countries in change from previous year

-2 of Russia's -4 : withdrawal

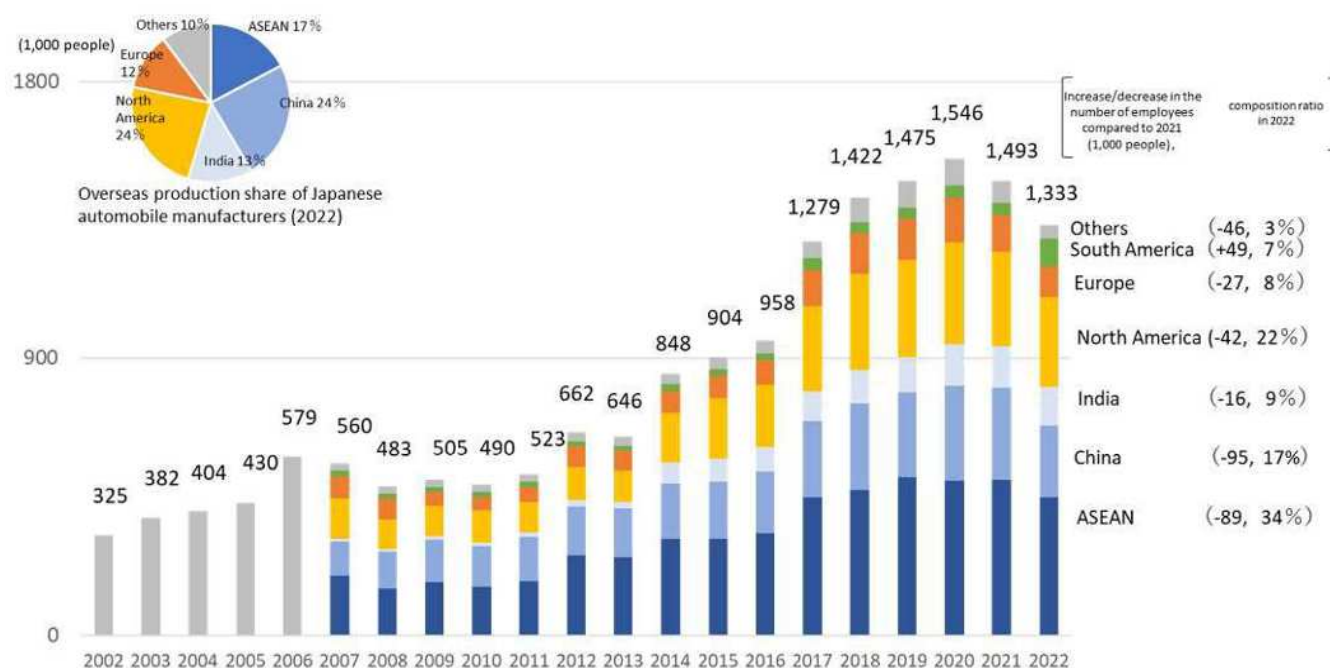
	1998	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
1	China (+16)	China (+10)	China (+28)	China (+38)	China (+31)	Mexico (+16)	Mexico (+15)	Mexico (+6)	Indonesia (+8)	China (+13)	Indonesia Mexico (+5)	Philippines (+5)	Mexico (+5)	China (+3)	China ▲17
2	U.S. (+14)	India (+9)	Thailand (+10)	India (+15)	Indonesia (+20)	China (+14)	Thailand (+11)	India (+2)	Thailand (+6)	Thailand Vietnam Brazil (+3)	Brazil (+4)	Brazil (+3)		Philippines (+2)	U.S. ▲7
3	India (+9)	Thailand (+7)	Indonesia (+9)	Indonesia (+14)	Mexico (+15)	Indonesia (+13)	China (+8)					Thailand UK (+2)			Philippines ▲6
4	Indonesia Korea (+4)	Indonesia Mexico (+3)	Vietnam Germany Morocco (+3)	Thailand (+4)	India (+8)	U.S. (+8)	Vietnam (+5)		Mexico Philippines Cambodia China (+3)		Thailand France Morocco (+3)	Indonesia Canada Spain Germany Italy Portugal Poland Turkey (+1)			Germany ▲6
5				Brazil (+7)	Vietnam (+6)	Russia (+6)	U.S. (+4)								Russia ▲4
6	Thailand (+4)	U.S. (+2)		Mexico (+6)	Thailand (+4)	Thailand (+5)	Brazil (+2)	Malaysia Vietnam Laos Paraguay France Moldova (+1)		Mexico UK Italy (+2)					Korea Brazil UK Czech Republic Poland ▲3
7			France (+2)	Germany (+4)	Russia (+4)	Brazil (+5)	Russia (+2)				India (+2)				
8															
9				Malaysia Vietnam Poland (+3)	Malaysia U.S. Turkey (+3)	India Germany Czech Republic (+4)					Philippines Colombia El Salvador Paraguay Serbia (+1)				
10															

Data: JAPIA Research on Overseas Operations by Member Companies FY2022

Changes in the number of employees of all subsidiaries with production function

The number of employees decreased by 160,000 compared to the previous year.

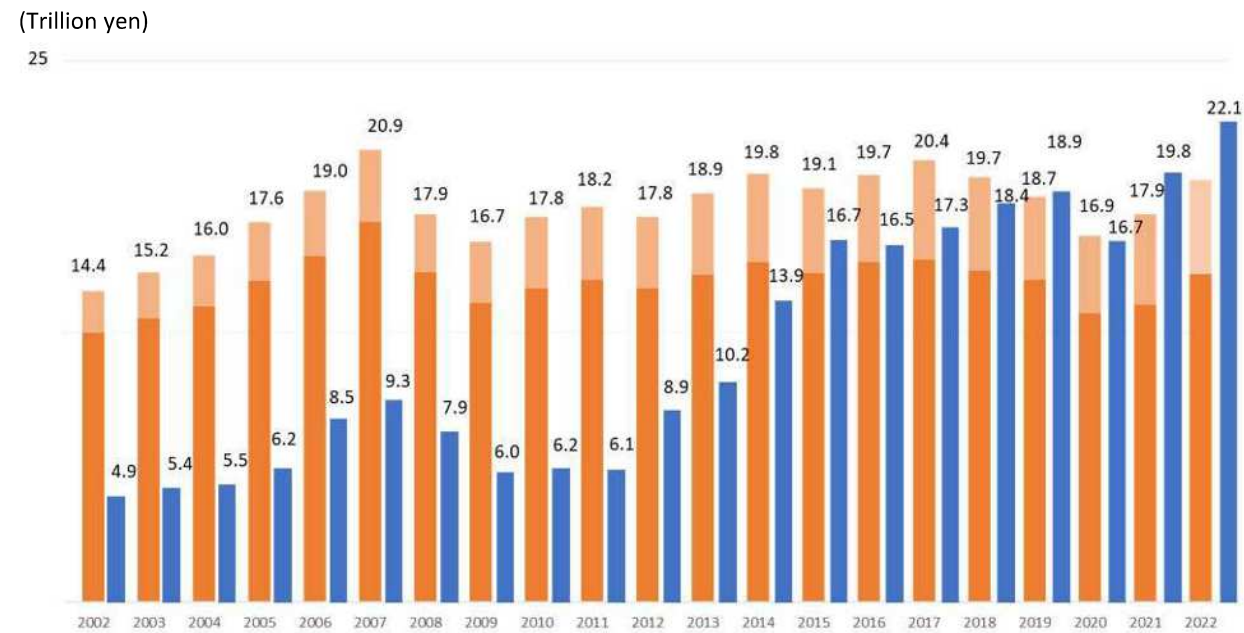
For the result of companies responded for the second consecutive year slightly decreased by 99% compared the previous year. (102% in North America, 98% in Europe).



Data: JAPIA Research on Overseas Operations by Member Companies FY2022 (Mexico is included in North America)

■Overseas subsidiaries with production function of JAPIA members, Changes in sales

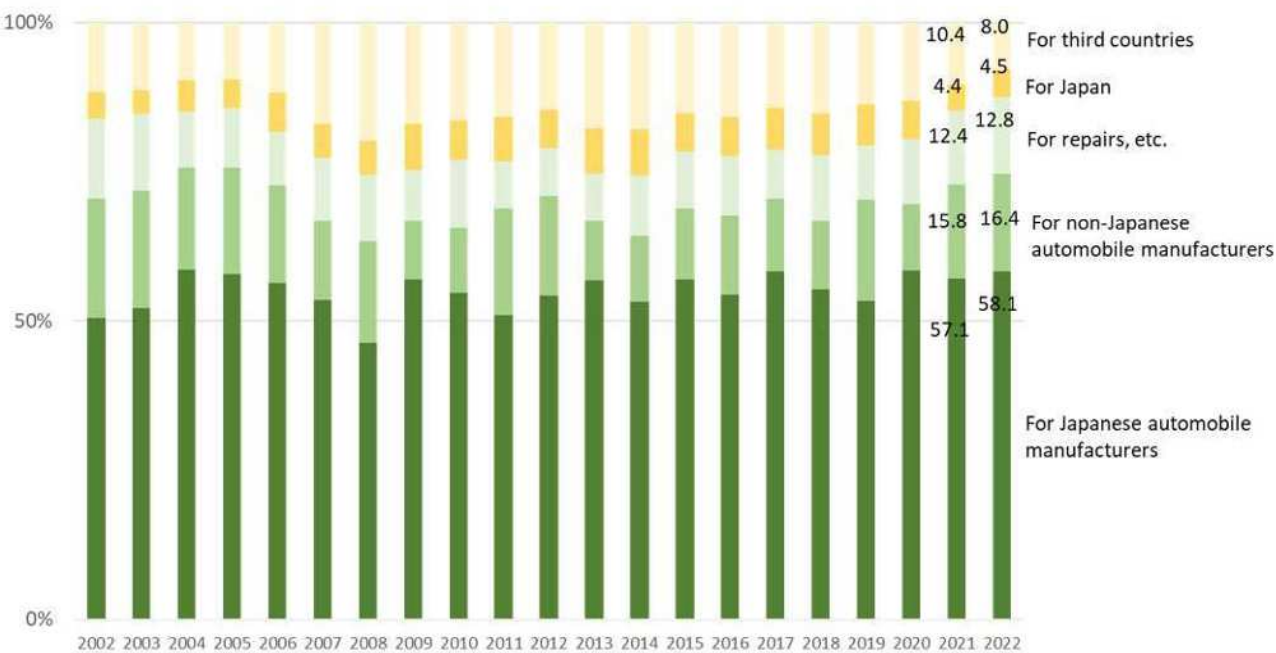
Total sales was JPY22.1 trillion. Increase of JPY2.3 trillion (+11.6%) from the previous year.
The result of companies responded for two consecutive years increased by 14% compared to the previous year, of this,12% is due to foreign exchange effects, so the real growth is 2%.



Data: JAPIA Research on Overseas Operations by Member Companies FY2022 (Mexico is included in North America)

■Overseas subsidiaries with production function of JAPIA members, Ratio of sales by destinations

The export share fell from 14.8% in 2021 to 12.5% in 2022, continuing the trend of supplying a higher proportion of local customers.
Dependence on Japanese automobile manufacturers has remained mostly unchanged. (by respondents for two consecutive years)

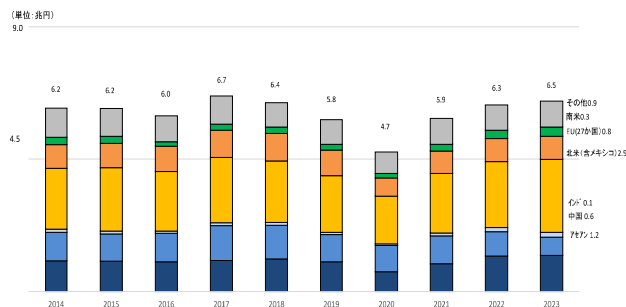


Data: JAPIA Research on Overseas Operations by Member Companies FY2022 (Mexico is included in North America)

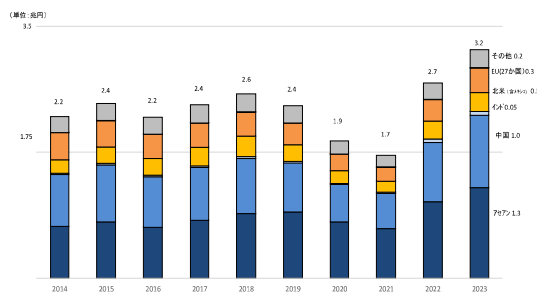
■Export and import of automobile components

The following table shows import/export trends for items with "for motor vehicles" or "for vehicles" in the product name in Ministry of Finance trade statistics.

【Exports of automobile components from Japan to the rest of the world, by region】



【Imports of automobile components from abroad to Japan, by region】

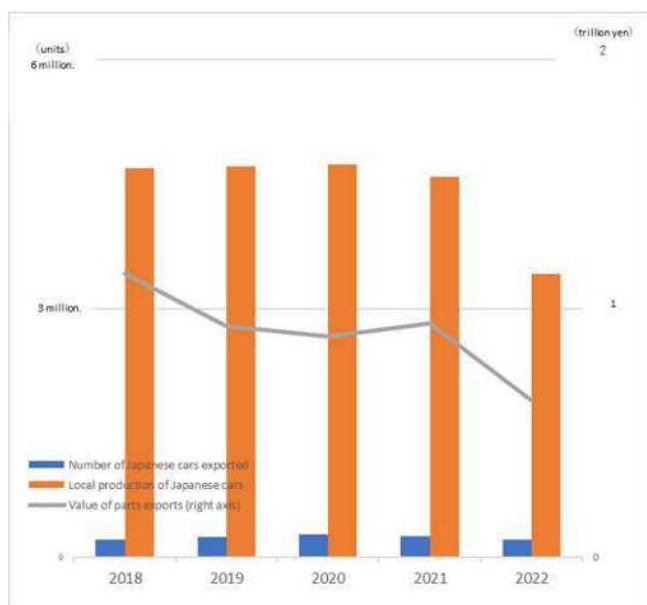


Source: Ministry of Finance (Mexico included in North America; EU 28 countries until 2019, 27 countries after 2020)

Situation of JAPIA member companies in China and the U.S.

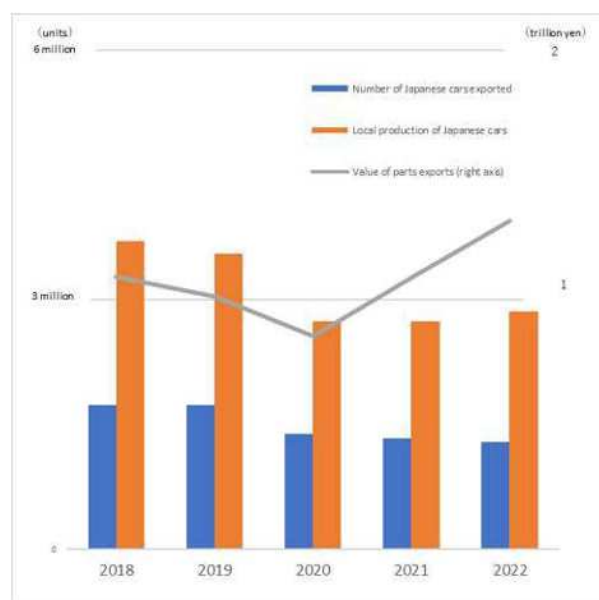
In view of trade friction between the U.S. and China, the situation in China and the US over the five years from 2018 to 2022 is summarized: from 2021 to 2022, China sees a large decrease in local production, with a corresponding decrease in the value of parts exports. As for the U.S., local production volume is slightly increasing and the value of parts exports is growing, partly due to the impact of the exchange rate.

< China >



Sources: JAMA, MarkLines, Ministry of Finance.

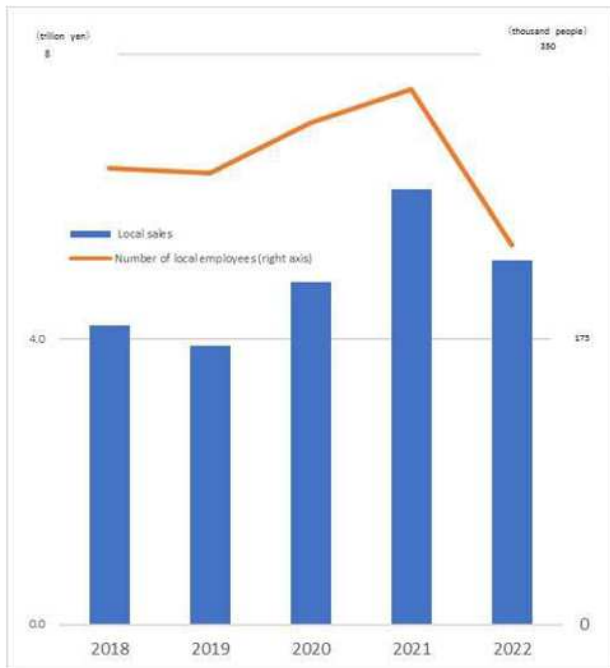
< the U.S. >



Sources: JAMA, MarkLines, Ministry of Finance.

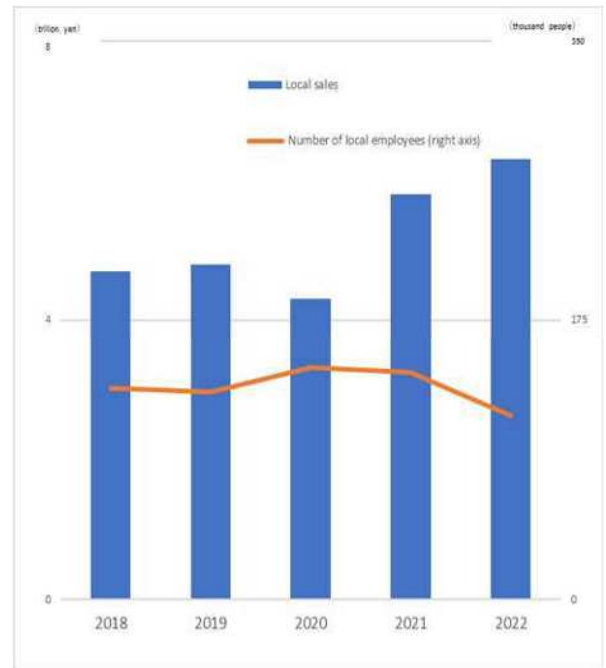
Local sales and number of employees of JAPIA members in 2022 both declined in China, while only sales increased in the U.S., but this is due to the impact of exchange rate fluctuations.

< China >



Sources : JAPIA Research on overseas operations by member companies

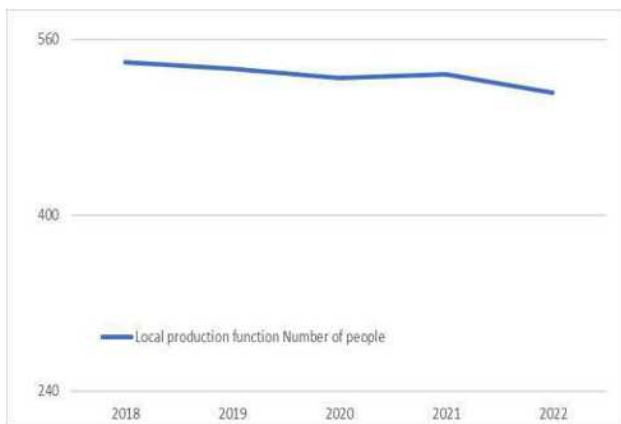
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Sources : JAPIA Research on overseas operations by member companies

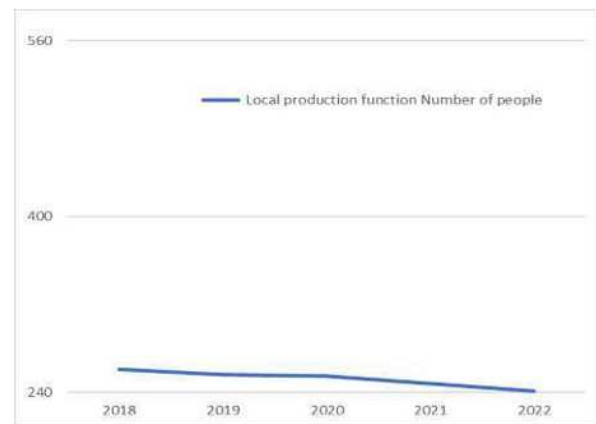
The number of local production function decreased in both countries. The decline was slower in the U.S. than in China.

< China >



Sources : JAPIA Research on overseas operations by member companies

< the U.S. >



Sources : JAPIA Research on overseas operations by member companies

Initiatives to improve subcontracting transactions

Activities to straighten collars (Task Force for improvement of subcontracting transactions)

(i) Price shifting (shifting tools, examples of shifting, etc.)

In addition to revising the Voluntary Action Plan to promote appropriate transactions, “Plan for thoroughness” was developed with the aim of increasing the effectiveness of the Voluntary Action Plan. JAPIA’s member companies (as order placers) took the initiatives in further transforming the entire supply chain of the automobile industry.

Furthermore, in order to promote smooth price negotiations and appropriate transactions, tools for easily checking price trends and price increases/decreases using published price data on raw materials, energy, labor costs, etc., as well as good practices of price shifting between member companies and suppliers were shared. As a result, the appropriate price pass-on of cost increases and appropriate distribution throughout the supply chain were promoted.

(ii) Penetration activities in the supply chain (briefing sessions in areas with automotive industry clusters)

In order to deepen understanding of fair transactions and to promote appropriate and prompt price shifting, briefing sessions were held in Hamamatsu, Hiroshima, and Fujisawa in the clusters of the automobile industry to introduce the addresses for improving subcontracting transactions by METI, automobile manufacturers, and auto parts manufacturers.

(iii) Cooperation with the Ministry of Economy, Trade and Industry and relevant associations (JAMA, industrial materials associations)

Ministry of Economy, Trade and Industry (METI) , JAMA and JAPIA held a joint seminar in September 2023 with the aim of spreading the thoroughness plan to member companies of both associations. Member companies were requested to implement initiatives as order placers to promote appropriate transactions and to spread the plan for thoroughness in the supply chain. In order to evolve partnerships throughout the supply chain in the automotive industry and contribute to strengthening the competitiveness of Japan's manufacturing capabilities, we exchanged views and strengthened cooperation with material industry related associations.

JAPIA HP

Improvement of transactions

<https://www.japia.or.jp/work/torihikitekiseika>

Tools to promote price shifting of raw materials, energy, etc.

https://www.japia.or.jp/topics_detail/id=3938

Examples of price shifting of raw material, energy and logistics costs

https://www.japia.or.jp/topics_detail/id=3975

Initiatives on Environmental Issues -Efforts towards carbon neutrality (CN)

1. JAPIA's policy

Policy	As an organization comprising the automotive industry, we will do our utmost to achieve the government's "2030 Emission Reduction Target", "2035 Green Growth Strategy" and "2050 Carbon Neutral".
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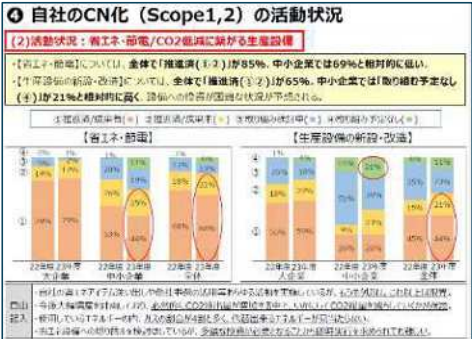
Voluntary action plan for environmental issues



JAPIA's Report at the Industrial Structure Council.
(Website of Ministry of Economy, Trade and Industry)

2. Activities for CN in 2023

(1) Survey, Goal and action plan (AP)



Survey results

Entry form for goal and action plan



Survey results and Goals and Action Plan
(Members-only website)

(2) Various seminars

Ten seminars were held to study CN support tools and provide various useful information.



CN-related information (seminars, support tools, etc.)

(3) Various CN support tools (how to proceed with activities and case studies)

- CN activity list in practice
- CN activity list in practice [for suppliers].
- Simplified calculation table visualized
- Energy-saving activity method table by facilities
- Examples of new business creation and business transformation
- Basic knowledge for CN promotion
- Case Studies of Energy Conservation Measures



CN activity list in practice



CN activity list in practice
(Members-only website)



Energy-saving activity method table by facilities
(Members-only website)

Environmental Initiatives

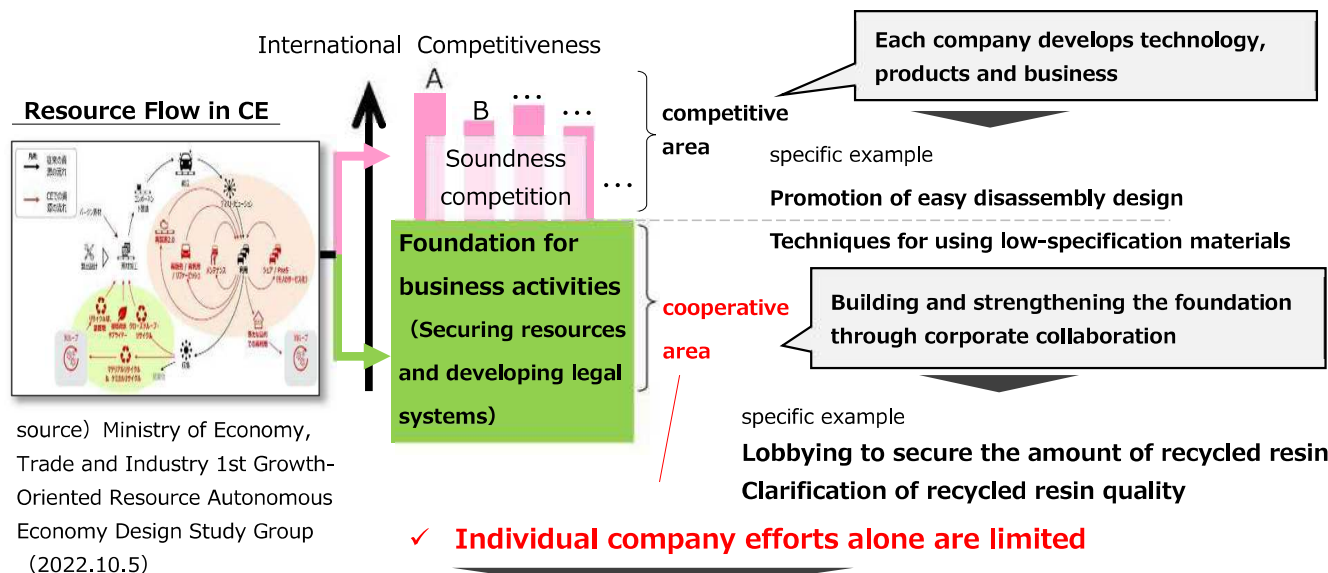
~Initiatives for a Circular Economy(CE)~

In June 2023, the Committee established a CE launch preparation team to accelerate CE activities of member companies, and in FY2023, based on the following policy and direction of activities, in addition to understanding the European ELV Regulations and considering public comments, the team promoted various activities, roadmap study, lobbying the government, and cooperation with JAMA. In addition to understanding the European ELV Regulations and examining public comments, we promoted various activities.

1. Policy and Activity Direction

In a global environment where resource depletion is predicted in the future, ambitious goals and strengthening of recycling infrastructures are being set, starting with Europe. In the domestic market, the creation of a market for recycled materials (cooperative area) that can quickly respond to CE in terms of quantity, quality, and cost will be encouraged.

While ensuring that the domestic auto parts industry as a whole is capable of exporting to Europe and the rest of the world, the goal is to create a situation that does not hinder further growth and creates new competitiveness (competitive area).



Preparatory team for CE study in the sectional industrial committee to study common issues in the cooperative area.

2. CE Task Force is established.

CE Task Force established in December 2012 to resolve issues surrounding CE. The number of members has been expanded to 36 from 16 companies.

Activities are being promoted in three working groups (roadmap study, market study, and liaison) with the aim of resolving issues to achieve the desired vision.



3. Activities (Submission of public comments on the ELV Directive in Europe)

The European ELV Directive proposal issued by the European Commission in July 2011 includes the mandatory use of recycled materials (PCR resin: 25%, of which 1/4 is ELV-derived).

The JAMA felt that the European ELV Directive was a major crisis, and the External Relations WG took the lead in reading the proposal and submitted it as a public comment to the European Commission on December 1.

In Japan, only two organizations, JAMA and BIA, are involved in this project. We will continue to conduct liaison activities to push for a favorable direction for the Japanese auto parts industry.

【Submission of public comments to the European Commission】


Public Comment Structure

1. Introduction of Divisional Associations

2. Our Stance on ELV Regulations

3. Opinions on each article

article	Articles and Concerns
Article 4.	Reusability, recyclability, and recoverability of vehicles •How to collect materials and mass throughout the supplier chain
Article 5.	Requirements for substances contained in automobiles •Application of substances of REACH concern to recycled materials
Article 6.	Minimum Reclamation Rate for Vehicles •PCR 25%, from which 25% of the ELV-derived settings
Article 7.	Designed to allow removal and replacement of components •Clarification of decision criteria that can be reflected in design
Article 10.	Declaration of recycled content with type certification •Clarification of calculation method for recycled material usage rate
Article 12.	Indication of parts, components, and materials contained in the vehicle •Material marking and labeling
Article 30.	Removal duty before crushing •Removal of parts secured to prevent theft or for safety reasons



December 1, 2023

Opinion of the Japan Auto Parts Industries Association on Proposal for a Regulation of the European Parliament and of the Council of the European Communities on vehicle design circularity requirements and the management of end-of-life vehicles

Introduction

The Japan Auto Parts Industries Association (JAPIA) was established in August 1969 as a public interest incorporated association for the purpose of promoting the Japan auto parts industry.

Since its reorganization as a general incorporated association in December 2015, the association has been engaged in a variety of activities for the development of the industry.

The high level of quality of each car component makes a significant contribution to the safety and comfortable driving of the car. In order to maintain high quality, JAPIA actively collaborates with member companies to solve various issues that arise in the automotive parts industry.

There are 6,500 auto parts manufacturers in Japan, with 640,000 direct employees. The company generated annual sales of EUR 222.2 billion. Japan's automotive industry accounts for 17.6% of Japan's manufacturing shipments. Japan's auto parts account for more than 50% of Japan's total automotive industry shipments, half of which come from JAPIA member companies.


2. Executive Summary

JAPIA's Basic Stance on the proposal

In response to the proposal announced by the European Commission, JAPIA is committed to "reducing carbon dioxide emissions" and "saving through resource recycling".

I agree with the basic idea from the point of view.

In addition, we were able to confirm that many verifications have been carried out at JIC.



In preparation

October 2023

November 2023

Public consultation

December 2023

Commission adoption

Feedback period

17 July 2023 - 30 December 2023 (single European time)

The Commission would like to hear your views

This document is open for feedback for a period of 8 weeks. At each of the European Commission and presented to the European Parliament and Council for adoption. Feedback received will be published on this website in order to continue your work to regulate or improve your existing rule.

Give feedback >

Proposal for a regulation - COM(2023)6451

Pages 11/4/21 - 2023-10-10 10:00

Public Comment

<https://www.japia.or.jp/files/user/japia/work/kankyo/DL/2023/20231201Opinion%20of%20the%20JAPIA%20on%20the%20ELV%20Regulations.pdf>

4. Activities (JAPIA Product Chemical Management 2023)

In order to promote and disseminate CE activities as an industry-wide issue, a lecture on CE issues in the parts industry association was given at JAPIA Product Chemical Management 2023 on September 21, 2023.

We will continue to promote activities to deepen understanding of CE activities in the parts industry associations.

Initiatives on Environmental Issues - Regulations of Chemical Substances -

1. "JAPIA Chemimane 2023", a pre-event for the 2024 Alliance Conference

JAPIA Chemimane 2023" was held to provide the latest information on chemical substance regulations, the status of industry initiatives, and JAPIA's activities to achieve carbon neutrality to a wide range of people in the auto parts industry, and received favorable reviews.



Venue; Tokyo International Exchange Center



Date: 21 September 2023

Themes	Speakers	Participants
Stockholm Convention, Ministry of Economy, Trade and Industry	Ministry of Economy, Trade and Industry	308
About JAPIA's chemical liaison	Product Environment Subcommittee	
Liaison Association of Medical, Measuring, Analytical and Control Equipment Related Industry Associations (called "Class 8 and 9 Liaison Association")	Nippon Electric Control Equipment Industries Association	
Latest trends in IMDS	IMDS External Relations Subcommittee	
Trends in the Circular Economy and JAPIA's initiatives.	Environmental Response Committee	
Guidelines for accounting of GHG in JAPIA.	LCA subcommittee	
CN initiatives in JAPIA	CN Subcommittee	

* 233 people watched the recording after the event.



2. [Advance notice] "JAPIA Chemimane 2024" is scheduled to be held

Scheduled to be held at the Tokyo International Exchange Center on 11-12 September 2024. On 11 September, an international event inviting AIAG and CLEPA will be held to discuss trends in chemical regulations and information communication systems in various countries. On 12 September, the activities of domestic organizations in response to movements abroad will be introduced.

Themes of 11 September (planned).	Speakers (tentative).
Latest trends of chemical regulations in North America	AIAG
Latest trends of chemical regulations in Europe	CLEPA
Trends in IMDS	JAPIA
Trends in IMDS (carbon footprint)	AIAG

Themes of 12 September (planned).	Speakers (tentative).
Japan's response to international treaties	Ministry of Economy, Trade and Industry
JAPIA's external relations activities	JAPIA Product Environment Subcommittee
External relations activities of DAIKIN INDUSTRIES, Ltd.	DAIKIN INDUSTRIES, Ltd.
External relations activities of Silicones Industry Association of Japan.	Silicones Industry Association of Japan
JAPIA's activities on LCA	JAPIA
JAPIA's activities on the circular economy	JAPIA CE Review TF

3. Outcome of activities on chemicals regulations (Submission of public comments to regulatory authorities)

We have investigated the degree of impact and submitted public comments to the regulatory authorities (European Chemicals Agency and Japan's Ministry of Economy, Trade and Industry) on issues (e.g. difficulty in substitution, insufficient switching period). By negotiating directly with them with concrete evidence, our comments were accepted.

substance	regulations	purpose of use	commodities	Outcomes of the negotiation
UV328	Chemical Substances Control Low	UV absorber	Paint Polarizing films	Exemption of Imported molded automotive products
Dechlorane Plus	Chemical Substances Control Low	Chlorinated flame retardant	Wiring harnesses Tapes PDAP resin	
MCCP (medium-chain chlorinated paraffins)	Stockholm Convention on Persistent Organic Pollutants	Metal working oils Flame retardant plasticizers	Cutting oil Press oil Rubber/resin Paint	Exemption for 10 years for products for processing oil

Negotiation activities are currently underway for the proposed regulation of **PFAS (organic fluorine compounds)**, which has a significant impact on member companies.

[Submission of public comments on the PFAS Regulation to the European Commission]

Public Comments

1. concerns about the proposed restrictions on PFASs
2. automobile components containing PFASs
(list of 2371 parts covered, photo).
3. assessment for environmental releases of PFASs

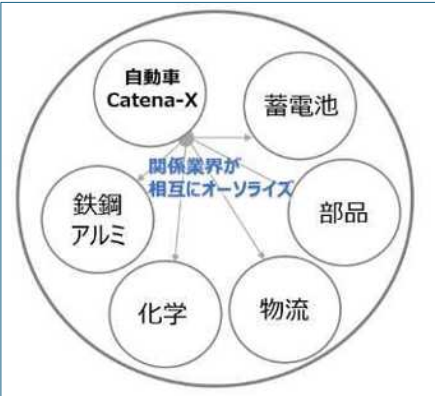


<https://echa.europa.eu/da/registry-of-restriction-intentions/-/dislist/details/0b0236e18663449b>

Initiatives on Digital

1. Activities of Data Distribution Realization Task Force

In Europe, "Catena-X", a platform for sharing data on supply chains across the automobile industry, was launched in March 2021, and efforts are underway to establish an open and secure data collaboration infrastructure. In April 2023, Cofinity-X, which operates a data distribution infrastructure, was established and is expected to be surrounded by a set of rules (ISO), operations (tools) and certification (audits). In addition, "European Battery Regulation", which will come into force in 2025, is the first use case for digital certificates to ensure traceability along the lifecycle of a product, which will spread across Europe, and it is being discussed that this rule would apply not only to automotive-related industries, but also to other industrial sectors such as metals, materials, and chemicals.



In response to these movements in Europe, Ministry of Economy, Trade and Industry (METI) has been working on the design of architectures, research and development, demonstration and social implementation and dissemination of mechanisms for the coordination of multiple information processing systems that are operated and managed by different parties together with the relevant ministries and agencies, Digital Architecture Design Centre (DADC) of Information-technology Promotion Agency, Japan (IPA), and New Energy and Industrial Technology Development Organisation (NEDO),. The initiative on data linkage has been named the "Ouranos Ecosystem".



In March 2023, JAPIA established "Data Distribution Realisation Task Force" and set up two teams: "Short-term response team" to respond to the European Battery Regulation as soon as possible, and "Medium- to long-term response team" to anticipate and prepare for future use cases. In August 2023, Medium- to long-term response team prepared "Medium- to long-term roadmap ver 1.0" summarising the urgent use cases set out in the Framework Policy, and reached consensus on the direction with Ministry of Economy, Trade and Industry and JAMA.

In addition, "Seminars on Digital" was held for member companies in November 2023, with 133 people participating online. In the questionnaire, 85% of respondents said that they understood well.

方針：データ流通基盤導入により、社会課題とそれを取り巻く自動車産業界の喫緊の課題解決のユースケース・代表部品を特定

COVID-19流行とそれに伴う生産拠点のロックダウンや国境の閉鎖、経済情勢の悪化、半導体などの部材不足と原材料価格、カーボンニュートラルへ等社会課題への取り組みなど、昨今のビジネス環境はVUCAの時代に直面している。

自動車産業界の喫緊の課題(例)

VUCAカテゴリ	キーワード
Volatility (変動性)	調達、在庫、コスト、生産...
Uncertainty (不確実性)	受給トレンド、政策、自然災害、地政学的リスク...
Complexity (複雑性)	多岐、多岐多岐グローバル化、サーキュレーション...
Ambiguity (曖昧性)	CFP、R&D、新製品の計画参入...

過剰投資による無駄なエネルギー/資源
フォースマジュールによる供給制限/停止
人口減少・少子高齢化による雇用の安定確保

OEMとサプライヤーが新たな相互信頼関係を築き、サプライヤーが自律的に動く安定したサプライチェーンの構築が重要

Tier1サプライヤーは、これまでの様にOEMに頼ったモノづくりをするのではなく、各種データを見て自ら意思決定・アクションできる体質に変わっていくために、サプライチェーン全般でのデータ共有を行い、以下を実施することが不可欠。

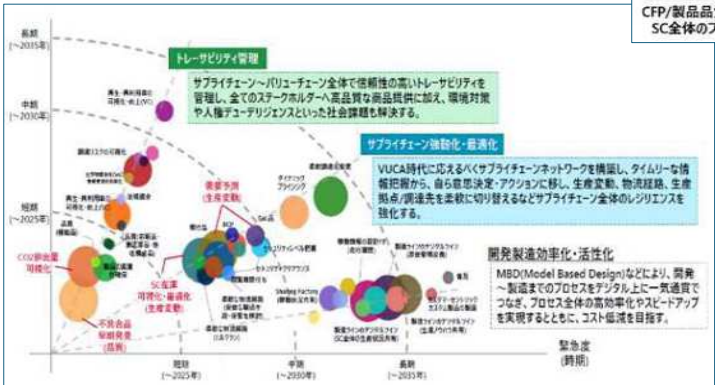
Tier1サプライヤーが市場不具合の境知を可能にしOEMの負担を軽減

生産変動によるサプライチェーン全般への影響を抑制

トレーサビリティ管理
CO2排出量可視化・低減
不具合品早期発見

データ流通基盤導入により、OEMとサプライヤー双方が真のうれしさを享受できることが狙い。

CFP/製品品質・付加価値/レジリエンス向上を最優先とし、OEMに集中し直販で連携していたデータをメッシュ型にデジタルでつなげSC全体のプレイヤーが健全な生産・開発活動に注力するために必要な情報を、簡便かつ迅速に入手でき、達成する仕組みにする



Data Distribution Realization TF
Medium- and long-term roadmap
(Members only page)



Data Distribution Realization TF
Seminars on Digital
(Members only page)

サプライチェーンのネットワークを用いたデジタル利活用に関するセミナー

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データ流通の動向と JAPIA の取り組み

2023年11月28日
(一社)日本自動車部品工業会
データ流通実現TF 中長期対応
啓蒙啓発支援WG

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 - 活動の目的
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 - 今後の活動(想定されるうれしき)
- まとめ

4. JAPIAの取組み 4.4 今後の活動(想定されるうれしき)

4.4.3. トレーサビリティ管理 (SWG4③ 不具合品早期発見)

供給部品と車両、動作状況の情報を個別に把握することで、サプライヤ自ら車両搭載後の状態を把握・分析できる。これにより、不具合部品の早期発見、OEMの負担軽減につながる

■品質情報トレーサビリティの流れ

現状: 部品供給・品質情報・データ交換・品質分析・不具合発生・不具合発生時の対応・品質改善・品質向上

将来: 部品供給・品質情報・データ交換・品質分析・不具合発生・不具合発生時の対応・品質改善・品質向上

検討内容: データ主権を確保するシステム要件はどうか、品質活動の迅速化に必要なデータ群はどうか、データ流通の実現による具体的な利益はどうか

3. 国内の動き

3.3. データ主権の担保

各国の取組み

- 2022年欧州データ戦略において、欧州はデータ経済圏を競争力とデータ主権を確保
- 電池規則(DSC)を踏まえたDD(C)Pを含むデジタル製品パスポートを義務化、今後はエコデザイン規則によりデジタル製品パスポートの義務化
- Catena-X, Catena-X等標準化の進展
- データ主権によるデータの国内保存・データ主権: 国家でデータ主権を確保する権利(例: 個人情報保護法: 国外流出には限定の手続き) Catena-X: 経済活動等
- GAFAMによるデータ主権化戦略によるヒューマン・データの世界的流通と、修理する権利法(例: 修理の権利)の議論が活発化

各地域にてデータ主権の担保によるデジタル経済圏が構築されている

現状と取組み

現状: 21/67 包括的データ戦略/閣議決定後、貿易協定でデータ流通原則/ルール/トラスト/適格承認/待機中(2023年)も重点計画としてまとめる計画

懸念事項: 日本はCO2排出削減を推進する一方で、海外からのデータ主権を確保する必要性を認識

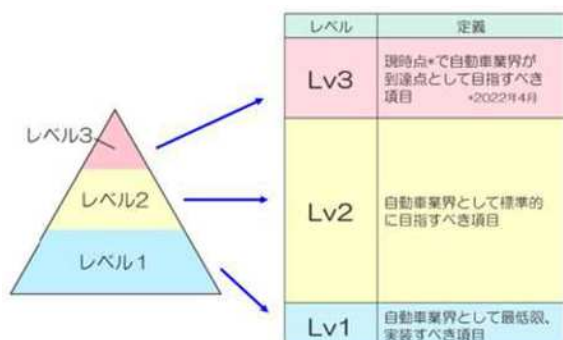
今後の課題: 国内のデータ流通政策等広く複数の標準に準拠した汎用インフラ構築、データ保有者が提供相手/案件等自ら決定できるデータ主権を確保、グローバル取引に備え国内でデジタルパスポート発行しデータ主権を確保

海外国とのデータ流通は必然であり、日本の産業界の発展にはデータ主権の担保が必要

2. Cyber security measures

JAMA and JAPIA developed the "Guideline for Supply Chain Cyber Security of JAMA/JAPIA" in March 2020 to promote efficient check and upgrading of cyber security measures in the entire automobile industry and published the revised version (V2.1), the commentary and check sheets in September 2023.

In addition, self-assessments using check sheets are regularly conducted throughout the automobile industry to raise the level of security. Approximately 6,600 people attended self-assessment briefings and consultations. Activities are underway with the goal of all companies achieving all Level 1 and 2 items by the end of FY2024.



Cyber Security Subcommittee organised five webinars aimed at sharing security information and promoting countermeasures, including for SMEs. This year, with the cooperation of JAMA, a session introducing actual serious incidents was added, which was well received.

In addition, in cooperation with the IPA and other organizations, support activities that are close to small and medium-sized enterprises will be promoted.



Latest Cyber Security Guidelines

Initiatives on Resilience

With the expansion and globalization of the market, the auto parts industry has globally promoted optimized production, procurement and logistics through localization of production, and desperately supported stable production during the semiconductor shortage and lockdown triggered by the COVID-19. However, as nationalism spreads, conflicts between authoritarian countries and liberal/capitalist countries become more serious, and the impact of economic coercion policies to achieve diplomatic objectives on supply chains is becoming a real and new threat, JAPIA has been conducting activities to support member companies in strengthening their resilience since FY2022.

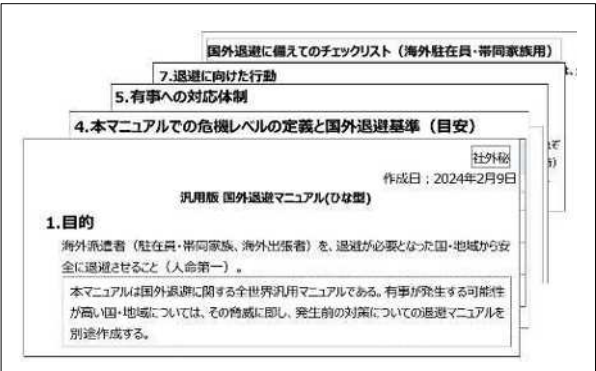
In FY2023, the organized issues ((i) ensuring employee safety, (ii) managing sensitive technology and preventing military diversion, (iii) business withdrawal, and (iv) linking production (multiplexing and alternative production)) were discussed on preconditions and how to proceed, and a versatile manual and flow were prepared and made available to members. In addition, seminars were organized with lecturers from the Ministry of Economy, Trade and Industry. Discussions were held with the Cabinet Secretariat and other relevant organizations.

■Ensuring the safety of employees

Discussions were held on why to withdraw, how to protect the safety of employees, etc., and a "generic version of the manual for evacuation outside the country (template)" was completed.



"Manual for Evacuation outside the country (template)"
(Members only page)



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■Sensitive technology management and prevention of military diversion

A "Knowledge Book on Sensitive Technology Management" has been completed, focusing on three areas: advanced and critical technology, technology convertible to military use, and a company's core technology.



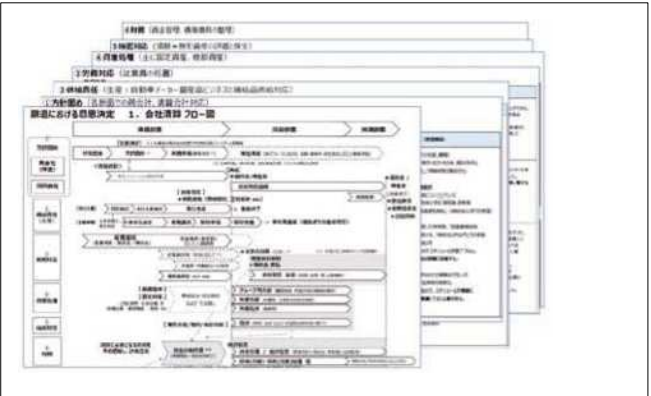
"Knowledge Book on Sensitive Technology Management"
(Members only page)

■Business withdrawal

The flow is completed by summarizing what needs to be done and key points in chronological order from the perspective of people, goods, money and information, as well as incorporating case studies from member companies.



Business withdrawal flow
(Members only page)



■Connecting production (multiplexing and alternative production)

Assumed risk scenarios and listed issues (pains) with assumed risks, and proceeded to examine and organize the issues for discussion as the automobile and parts industry.

Initiatives on Standards Certification

Standards certification of emerging countries and ASEAN MRA

The Standards and Certification Subcommittee works with national and overseas organizations to address issues related to standards and certification in ASEAN countries, India, China and other emerging economies, and to promote approaches to national authorities in order to solve problems in the automobile component industry. In November 2023, JAPIA participated in the Asia Public-Private Forum (in Vietnam) organized by JASIC, where we presented the benefits of standards harmonization and mutual recognition from the perspective of JAPIA to representatives of ASEAN countries and we mainly introduced the benefits of activities after joining to the 1958 Agreement. Through the activities under the 1958 Agreement, we were able to convey the benefits to the industry in terms of reduced testing and certification costs based on a common certification system, as well as the benefits of harmonization and mutual recognition from the public and private sectors, to share an image for the future Asian MRA, and to deepen understanding among the participating countries and regions.

