Special Feature Article

Japan Mobility Show 2025 Review

— Automotive Parts Manufacturers showcase cutting-edge electrification and intelligentization technologies —

From October 29 to November 9, 2025, the Japan Mobility Show (JMS) 2025 was held at Tokyo Big Sight (Tokyo International Exhibition Center, Koto Ward, Tokyo). Formerly known as the Tokyo Motor Show, the event—rebranded as a comprehensive showcase of diverse mobility solutions—was held for the second time under its new name. A record 522 companies and organizations exhibited at the show, and total attendance reached 1.01 million visitors.

During the event, concept cars and new models from domestic and international automakers added vibrancy to the venue, attracting widespread attention. At the same time, exhibits featuring automotive components and technologies essential to the realization of next-generation mobility also drew strong interest from automobile enthusiasts.

Against the backdrop of a slowdown in the shift toward electrification, many of the vehicles exhibited by automakers followed a more “realistic” approach with commercialization in mind. In contrast, automotive parts manufacturers—including JAPIA member companies—once again highlighted their strengths by proposing technologies aligned with future changes, such as electrification and intelligent systems, clearly demonstrating their readiness for the transformation of mobility.

In addition, companies fully leveraged this biennial opportunity, which attracts large numbers of general visitors, to promote their corporate brands to audiences with whom they typically have limited contact, while also communicating their appeal as employers with an eye toward talent acquisition.

A Return to a “Pragmatic Approach” to Revitalize the Market

At this year’s JMS, compared with the previous edition where a strong emphasis on EVs and next-generation mobility was particularly evident, many exhibits featured new production-bound vehicles and concept cars with a clear path toward commercialization.

Toyota Motor Corporation unveiled the Land Cruiser FJ for the first time, a new model scheduled for market launch in 2026. Manufactured in Thailand and imported to Japan, the vehicle is a full-fledged off-road model built on a ladder frame, while positioning itself as an entry-level model by keeping body size and price in check. It has drawn high expectations as a potential hit that could inject new momentum into the Land Cruiser series.

Honda Motor Co., Ltd. exhibited the Zero Alpha, a compact SUV from its next-generation EV “Zero” series slated for launch in 2027, as well as the Super One, an A-

segment EV based on the N-ONE e: and scheduled for release in 2026. Nissan Motor Co., Ltd. presented the Elgrand, its flagship minivan planned for a full model change in fiscal 2026. With the current model having remained on the market for more than 15 years, the arrival of the next-generation Elgrand is widely anticipated as a catalyst for Nissan's revival.

With many exhibits clearly specifying their market launch timelines, this year's JMS underscored a notable shift in direction. Noriya Kaihara, Chair of the Mobility Show Committee of the Japan Automobile Manufacturers Association (JAMA) and Vice President of Honda, commented on the overall trend, noting that "the exhibits appear to be aligned with a more realistic approach, looking relatively a few years ahead." Displays that have recently taken center stage at auto shows in Japan and overseas—such as futuristic mobility concepts and mobility services—were instead largely featured within organizer-led programs such as the Tokyo Future Tour 2035.

Amid these developments, one message stood out clearly: automakers intend to continue competing with a variety of powertrain options while reducing environmental impact. Against the backdrop of a global slowdown in the shift toward EVs, the atmosphere surrounding JMS has changed markedly from the previous show, which was characterized by an almost exclusive focus on electrification. Subaru Corporation presented concept cars representing both EVs and internal combustion engine vehicles, illustrating diverse future visions for its high-performance STI brand. Mazda Motor Corporation, meanwhile, showcased the Vision X Coupe, which combines a rotary engine with a battery and incorporates a CO_2 capture system. By advocating the concept of "carbon negative," in which the amount of CO_2 reduced exceeds emissions, Mazda Motor Corporation emphasized that internal combustion engine vehicles can still make meaningful contributions to environmental sustainability.

Parts manufacturers take the lead in communicating Electrification and Intelligentization

Meanwhile, in the West Hall where booths of Automotive Parts Manufacturers were concentrated, many exhibits highlighted preparations for the market environment of the 2030s and beyond. As the waves of electrification and intelligent technologies are inevitable and irreversible, each company combined its proprietary technological strengths with expertise in digital fields, competing to demonstrate how it can establish a strong presence in the next-generation mobility industry.

The key phrase resonating throughout the hall was "Software-Defined Vehicle (SDV)." The concept of vehicles being continuously connected to networks and evolving through over-the-air (OTA) updates has become commonplace, with emerging players such as Chinese EV-focused manufacturers leading agile development in this domain. Japanese and European suppliers, which accounted for the majority of exhibitors, also

clearly articulated a firm commitment to keeping pace with this trend.

Robert Bosch GmbH positioned “software-driven mobility” as its central theme. While continuing to advance hardware innovation, the company is simultaneously pursuing highly flexible technologies built on software platforms. One concrete example of this approach is its integrated control technology known as Vehicle Motion Management (VMM). Using system integration software, VMM comprehensively controls multiple actuators—such as steering, powertrain, and suspension—to enhance the core functions of “driving, turning, and stopping,” while also allowing vehicle behavior to be tailored to individual user preferences. Christian Mecker, President of Bosch Corporation, commented, “We aim for a world in which vehicle functions can be continuously expanded, just as consumers update their smartphones. The source of vehicle value is shifting to software.”

JTEKT Corporation also showcased its “Integrated Steering and Drive Unit,” which consolidates not only the functions of “driving, turning, and stopping” but also the ability to “lower (vehicle height)” into a single unit, presenting the concept through a technical presentation. By integrating hardware expertise across multiple domains through software, the company seeks to realize an entirely new in-vehicle experience. President Yoshito Kondo emphasized that “to create new solutions, it is essential not to be bound by self-reliance alone, but to combine competencies with customers, suppliers, and new co-creation partners,” expressing expectations for more advanced solutions through cross-company collaboration in elemental technologies.

If motors and batteries represent the “heart” of next-generation mobility, then high-performance power modules serve as the “brain,” enabling not only high system output but also sophisticated software-based control. DENSO Corporation introduced a new inverter currently under development, featuring a proprietary three-dimensional structure formed on silicon carbide (SiC) semiconductor wafers to maximize power efficiency. Leveraging cooling technologies cultivated through automotive air-conditioning systems, the company also developed a double-sided cooling structure with flat-mounted power cards. As a result, power losses were reduced by 70% and size by 30% compared with conventional products, achieving what the company describes as “the world’s highest power density,” according to President Shinnosuke Hayashi.

Traditionally, the role of suppliers has focused on designing individual components for specific functions and optimizing each in isolation. Looking ahead, however, the premise will be to bundle functions horizontally through software and to continue updating them over extended periods. Software is no longer merely an adjunct to control; it is increasingly becoming the “core” that determines value across the entire supply chain.

New players also make a strong impression

New entrants also asserted their presence at the show. One notable example was

the participation of SCSK Corporation, a major systems integrator within the Sumitomo Corporation Group, which brought a concept car to the venue. By participating directly in vehicle development without being constrained by traditional Tier-based hierarchies, a cloud- and software-focused company highlighted a new model of vehicle manufacturing suited to an era of horizontal division of labor. How software-centric development processes will redraw the boundaries of the automotive industry is drawing increasing attention.

Sharp Corporation, a subsidiary of Hon Hai Precision Industry Co., Ltd. (Foxconn), also exhibited a next-generation EV concept that has been under development for some time. The vehicle was based on Foxconn's "Model A." By combining Foxconn's growing presence in contract-based, horizontally structured vehicle development with Sharp Corporation's strengths as a long-established consumer electronics manufacturer with deep knowledge of the Japanese market, the exhibit presented a concept of "a mobile living space that can be utilized not only while driving but also when parked, through the creation of products that are easy to use and tailored to individual users" (Mototaka Taneya, CTO). Sharp Corporation is primarily responsible for the development of interior design, artificial intelligence (AI), and consumer electronics functions, taking on the challenge of how far personalization can be pursued in EVs that are increasingly becoming commoditized. The exhibited vehicle is targeted for market launch in 2027, and according to CTO Taneya, "we have already received multiple comments saying, 'I want to buy it.'"

A significant number of JAPIA member companies also made their debut as new exhibitors. At the "Startup Future Factory," a program first launched during JMS Bizweek in 2024, ten additional companies participated this time. By leveraging JMS as a venue for business matching, participants explored opportunities for open innovation with companies across a wide range of industries, extending beyond the automotive sector.

During the show, Minister of Economy, Trade and Industry Ryosei Akazawa visited the venue and held discussions with Masanori Katayama, Chairman of the Japan Automobile Manufacturers Association (JAMA), and Akio Toyoda, Chairman of the Japan Automobile Conference. While addressing pressing issues such as U.S. tariff policy and the securing of semiconductor supply chains, the Minister also touched on the trend toward SDVs, stating emphatically, "I would like to work closely together with all of you." He toured various exhibits proposing the social implementation of next-generation mobility, including autonomous trucks and EV fleet services, and remarked with evident satisfaction that "it is an engaging exhibition that offers a glimpse into the future of society as a whole, including collaboration with other industries and initiatives involving startups."

Held once every two years, the Japan Mobility Show serves as a barometer of the vitality of Japan's automotive industry, a cornerstone of the nation's economy. The many products, services, and technologies unveiled here offer insights not only into current trends, but also into the future trajectory of the industry itself.