

Research on the domestic production of the member companies in FY 2016 (Summary)

* The results in detail including production by product and for before FY 2015 are released only in Japanese. Please see the website in Japanese.

1. Outline

1) Method

The survey was conducted by the questionnaire on the domestic production of the member companies during the period of FY 2016.

2) No. of responses

The number of target member companies except associate members is 391. And No. of responses is 346 with a response ratio of 88.5%.

I) Response ratio by region

	No. of companies	No. of responses	Response ratio
Kanto region(East Japan)	218	187	85.8%
Chubu region(Central Japan)	91	86	94.5%
Kansai region(West Japan)	82	73	89.0%
Total	391	346	88.5%

II) Response ratio by capital

Capital	No. of companies	No. of responses	Response ratio
More than JPY 10 billion	59	54	91.5%
JPY 5 billion to JPY 10 billion	35	35	100.0%
JPY 2 billion to JPY 5 billion	41	38	92.7%
JPY 1 billion to JPY 2 billion	22	22	100.0%
JPY 0.5 billion to JPY 1 billion	14	13	92.9%
JPY 0.3 billion to JPY 0.5billion	52	44	84.6%
JPY 0.1billion to JPY 0.3billion	23	20	87.0%
Less than JPY 0.1 billion	145	120	82.8%
Total	391	346	88.5%

* Value of the production is only that of auto parts.

III) Response ratio by production

Value of Production	No. of companies	No. of responses	Response ratio
More than JPY 200 billion	26	26	100.0%
JPY 100 billion to JPY 200 billion	18	18	100.0%
JPY 50 billion to JPY 100 billion	36	36	100.0%
JPY 30 billion to JPY 50 billion	35	35	100.0%
JPY 10 billion to JPY 30 billion	84	83	98.8%
Less than JPY 10 billion	192	148	77.1%
Total	391	346	88.5%

2. Results

1) Production trends

I) Total production

The total value of production in FY2016 by 346 responding member companies was JPY 19,706.4 billion, a 3.1% increased to the previous FY. Among them, the value of production of 331 companies that responded in both FY2015 and FY2016 increased by 2.2% compare to FY 2015.

Unit: JPY million

	No. of Companies	Total value of production	Total value of production (331 companies above mentioned)
FY 2015(A)	341	19,120,473	19,028,975
FY 2016(B)	346	19,706,476	19,455,996
(B) / (A)		103.1%	102.2%

II) Production by capital

Capital	No. of companies	Value of production (JPY million)	Composition(%)	G. rate(%)
More than JPY 10 billion	54	12,000,498	60.9%	107.5%
JPY 5 billion to JPY 10 billion	35	2,639,606	13.4%	89.3%
JPY 2 billion to JPY 5 billion	38	2,170,933	11.0%	101.6%
JPY 1 billion to JPY 2 billion	22	546,975	2.8%	99.2%
JPY 0.5 billion to JPY 1 billion	13	379,950	1.9%	129.0%
JPY 0.3 billion to JPY 0.5billion	44	1,070,444	5.4%	96.2%
JPY 0.1billion to JPY 0.3billion	20	229,739	1.2%	85.7%
Less than JPY 0.1 billion	120	668,331	3.4%	105.7%
Total	346	19,706,476	100.0%	103.1%

III) Production by value

Value	No. of companies	Value of production (JPY million)	Composition(%)	G. rate(%)
More than JPY 200 billion	26	11,544,186	58.6%	103.7%
JPY 100 billion to JPY 200 billion	18	2,309,464	11.7%	96.4%
JPY 50 billion to JPY 100 billion	36	2,486,753	12.6%	109.5%
JPY 30 billion to JPY 50 billion	35	1,394,568	7.1%	113.7%
JPY 10 billion to JPY 30 billion	83	1,500,431	7.6%	90.7%
Less than JPY 10 billion	148	471,074	2.4%	106.4%
Total	346	19,706,476	100.0%	103.1%

IV) Production by No. of employees

No. of employees	No. of companies	Value of production (JPY million)	Composition(%)	G. rate(%)
More than 2,001	43	13,121,431	66.6%	104.3%
1,001 to 2,000	41	2,960,816	15.0%	106.7%
501 to 1,000	52	1,937,576	9.8%	91.4%
301 to 500	49	896,688	4.6%	99.3%
101 to 300	79	656,089	3.3%	105.7%
Less than 100	82	133,876	0.7%	112.9%
Total	346	19,706,476	100.0%	103.1%

*The number of employees of each company is calculated by the ratio of auto parts production among all products.

V) Production by type of products

		346 Companies			331 Common companies	
		Production(JPY million)	Composition(%)	G. rate(%)	Composition(%)	G. rate(%)
Auto Parts	Motor related	2,814,619	14.3%	100.7%	14.3%	100.4%
	Electric & Electronic	2,391,836	12.1%	97.7%	12.0%	95.9%
	Lighting & Meter	3,008,832	15.3%	105.0%	15.3%	104.0%
	Drive, Transmission & Steering related	4,291,290	21.8%	103.7%	21.6%	101.9%
	Suspension & Brake related	1,029,483	5.2%	99.6%	5.3%	100.1%
	Frame related	4,168,411	21.2%	104.9%	21.3%	104.9%
	Sub-total	17,704,471	89.8%	102.6%	89.8%	101.7%
Accessories	Audio related	273,862	1.4%	88.4%	1.4%	88.4%
	Air conditioner related	744,599	3.8%	99.7%	3.8%	100.8%
	Others	162,643	0.8%	98.4%	0.8%	97.2%
	Sub-total	1,181,104	6.0%	96.6%	6.1%	97.1%
Others	IT related	820,901	4.2%	126.8%	4.2%	124.9%
Total		19,706,476	100.0%	103.1%	100.0%	102.2%

* The value of production of 331 companies: Companies responding in both FY2015 and FY2016.

VI) Production by customers

Customers			Production(JPY million)		Composition(%)	G. rate(%)
For vehicles	OEMS	Component parts	Domestic i)	11,455,301	58.1%	102.5%
			Overseas ii)	1,642,084	8.3%	92.2%
		Repair parts	domestic iii)	357,094	1.8%	104.3%
			Overseas iv)	62,240	0.3%	179.2%
	For body manufactures v)			389,172	2.0%	101.5%
	For dealers vi)			110,873	0.6%	112.4%
	For OES		Domestic xii)	2,934,261	14.9%	105.8%
			Oversea xiii)	1,437,347	7.3%	119.1%
	For auto parts shops		Domestic ix)	282,053	1.4%	104.9%
			Overseas x)	774,881	3.9%	95.3%
	Total i) to x)			19,445,306	98.7%	103.0%
For motor-cycles	Component parts		Domestic xi)	155,333	0.8%	110.9%
			Overseas xii)	79,053	0.4%	99.3%
	Repair parts		Domestic xiii)	11,478	0.1%	93.2%
			Overseas xiv)	15,306	0.1%	102.2%
	Total xi to xiv			261,170	1.3%	105.7%
Total i) to xiv			19,706,476	100.0%	103.1%	

* Domestic: Customers are in Japan, but the value is includes exports by customers.

* Overseas: Exports by respondents themselves.

VII) Production by component & repair parts

Unit: JPY million

	For Vehicles		For motorcycles		Total	Composition (%)	G. rate(%)
	Domestic	Overseas	Domestic	Overseas			
Component	11,844,473	1,642,084	155,333	79,053	13,720,943	69.6%	101.2%
Repair	750,020	837,121	11,478	15,306	1,613,925	8.2%	101.8%
OES	2,934,261	1,437,347	—	—	4,371,608	22.2%	109.8%
Total	15,528,754	3,916,552	166,811	94,359	19,706,476	100.0%	103.1%

* From table vi) above.

- For vehicles: Domestic/Component = i+v, Overseas/Component = ii, Domestic/Repair = iii + vi + ix, Overseas/Repair = iv + x, Domestic/OES = vii and Overseas/OES = viii
- For motorcycles: Domestic/Component = xi, Overseas/Component = xii, Domestic/Repair = xiii and Overseas/Repair = xiv

VIII) Production by domestic & overseas costumers

Unit: JPY million

	Domestic	Overseas(A)	Total(B)	Ratio A/B(%)	Composition(%)	G.rate(%)
Vehicle	15,528,754	3,916,552	19,445,306	20.1%	98.7%	103.0%
Motor cycle	166,811	94,359	261,170	36.1%	1.3%	105.7%
Total	15,695,566	4,010,911	19,706,476	20.4%	100.0%	103.1%

* From table vi) above.

- Vehicles/Domestic = i+iii+v+vi+vii+ix and Vehicles/Overseas = ii+iv+viii+x

- Motorcycles/ Domestic = xi+xiii and Motorcycles/Overseas = xii+xiv

IX) Production by repair parts & accessories for vehicles

Unit: JPY million

	Repair parts	Accessories(A)	Total(B)	A/B(%)	Composition (%)	G.rate(%)
For OEMs	364,740	54,593	419,333	13.0%	26.4%	111.2%
For dealers	30,387	80,486	110,873	72.6%	7.0%	112.4%
For auto parts shops	748,234	308,701	1,056,935	29.2%	66.6%	97.7%
Total	1,143,361	443,780	1,587,141	28.0%	100.0%	101.9%

2) Level of specialization for auto parts

I) Level of specialization for auto parts of respondents

Specialization ratio for auto parts	No. of companies	Production(JPY million)	Composition(%)	G.rate(%)
More than 90%	174	11,885,787	60.3%	99.5%
70% to 90%	69	5,155,071	26.2%	118.3%
50% to 70%	36	844,142	4.3%	76.4%
30% to 50%	27	545,402	2.8%	175.5%
Less than 30%	40	1,276,074	6.5%	91.3%
Total	346	19,706,476	100.0%	103.1%

II) Level of specialization for auto parts by production scale

Production scale	Less than 30%	30% to 50%	50% to 70%	70% to 90%	More than 90%	Total
More than JPY 200 billion	2	0	1	5	18	26
JPY 100 billion to JPY 200 billion	1	2	1	4	10	18
JPY 50 billion to JPY 100 billion	1	1	3	9	22	36
JPY 30 billion to JPY 50 billion	3	2	1	12	17	35
JPY 10billion to JPY 30 billion	7	6	6	21	43	83
Less than JPY 10 billion	26	16	24	18	64	148
Total	40	27	36	69	174	346

3) Business with OEMs

Production scale	No. of OEMs(incl. motorcycles)					Total
	None	1	2	3 to 4	5 to 14	
More than JPY 200 billion	2	1	0	0	23	26
JPY 100 billion to JPY 200 billion	2	0	0	2	14	18
JPY 50 billion to JPY 100 billion	0	0	1	1	34	36
JPY 30 billion to JPY 50 billion	1	1	4	5	24	35
JPY 10billion to JPY 30 billion	8	3	4	14	54	83
Less than JPY 10 billion	61	20	16	18	33	148
Total	74	25	25	40	182	346

* Business: Direct Delivery to OEMs.

	No. of OEMs per member company
FY 2015	7.33 Companies
FY 2016	7.38 Companies

4) Production & employee

I) Production per employee

	FY 2015	FY 2016
No. of companies	341	346
Total No. of employees(A)	375,445	376,067
Total production(B)	19,120,473 (JPY million)	19,706,476 (JPY million)
Production per employee	50.9 (JPY million)	52.4 (JPY million)
Production per employee(G. rate)	91.5 %	102.9 %

II) Production per employee by scale of employee

No. of employees	No. of Companies	Production (JPY million)	No. of employees	Production per employee (JPY million)
More than 2,000	43	13,121,431	242,249	54.2
1,001 - 2,000	41	2,960,816	57,850	51.2
501 - 1,000	52	1,937,576	38,083	50.9
301 - 500	49	896,688	19,247	46.6
101 - 300	79	656,089	15,378	42.7
Less than 100	82	133,876	3,260	41.1
Total	346	19,706,476	376,067	52.4