August,2018

Research on overseas operations by JAPIA member companies (FY2017)

Japan Auto Parts Industries Association (JAPIA)

◆**Implementation summary**

-Method; Inquiry to member companies

-Inquiry; August 2018

-Target period; FY2017

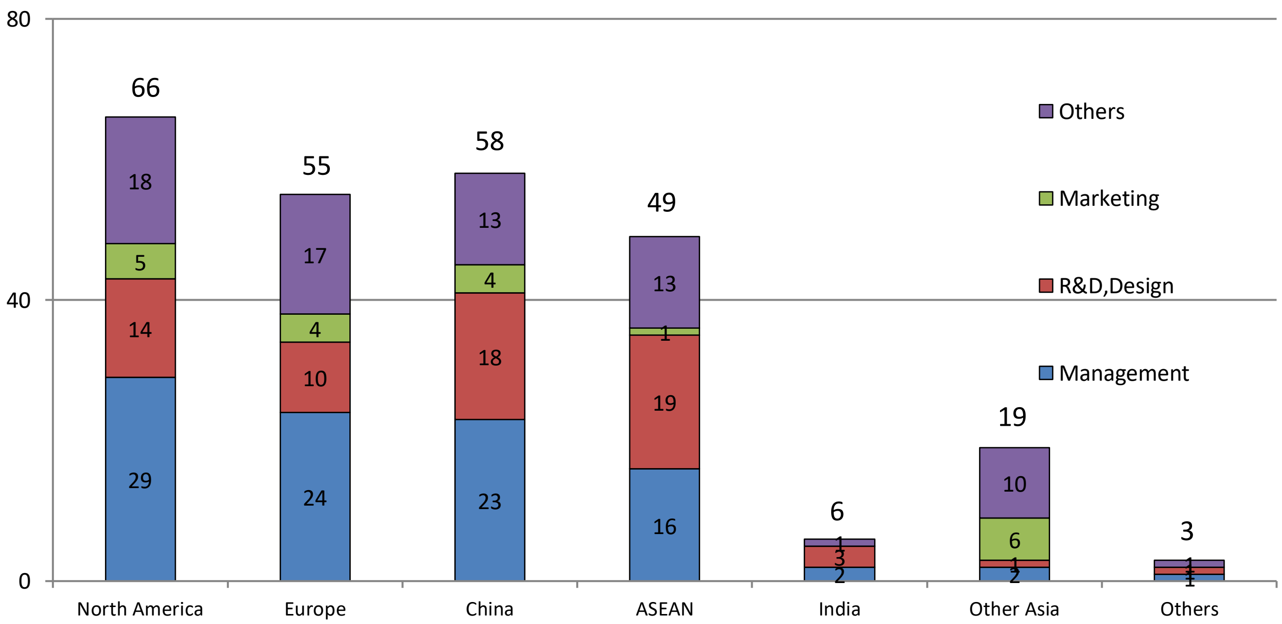
-Number of respondents;275, Number of valid responses;216, ratio of valid responses;78.5%

North America including Mexico

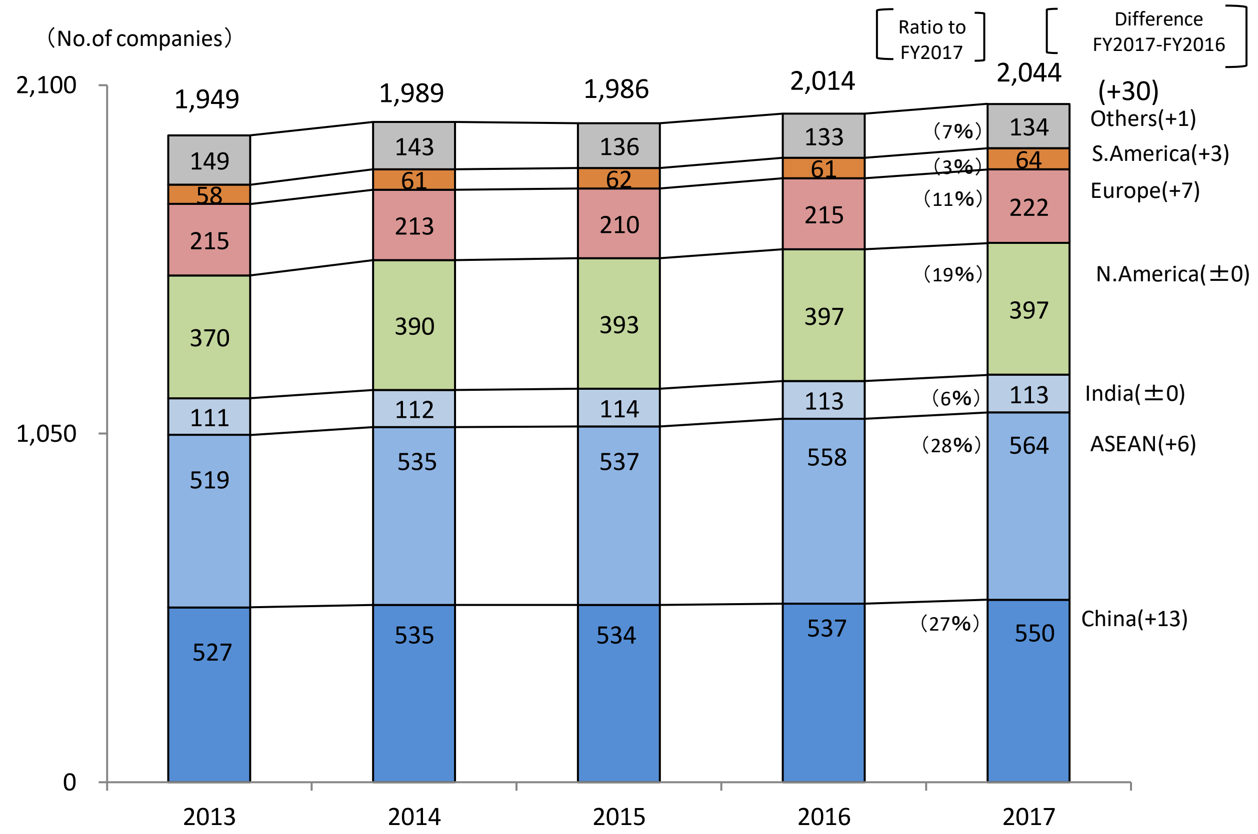
◆Number of overseas sites of member companies

		North America	Europe	Asia	(China)	(ASEAN	(India)	South America	M.East Africa Others	Total
Production	FY2017	397	222	1,321	550	564	113	64	40	2,044
	FY2016	397	215	1,302	537	558	113	61	39	2,014
Sales	FY2017	81	80	214	57	92	11	11	25	411
	FY2016	79	81	208	53	88	12	12	26	406
Others	FY2017	66	55	132	58	49	6	0	3	256
	FY2016	68	55	129	60	46	5	0	3	255
Total	FY2017	544	357	1,667	665	705	130	75	68	2,711
	FY2016	544	351	1,639	650	692	130	73	68	2,675
Difference	FY'17/'16	±0	+6	+28	+15	13	±0	+2	±0	+36

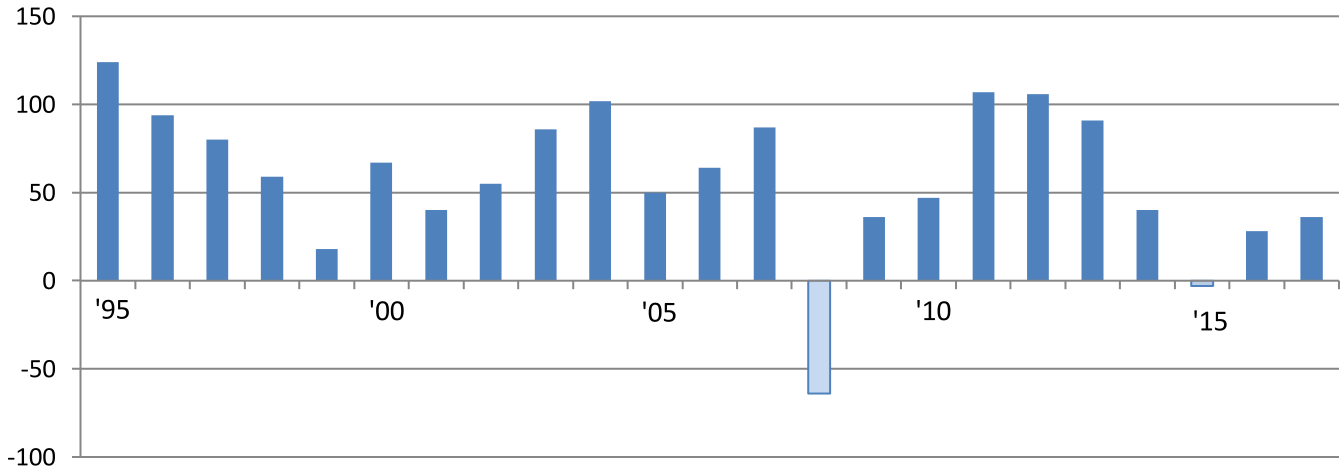
◆Breakdown of "others 256 "in the table mentioned above



◆Number of overseas production sites by region



◆Change of increase and decrease of the number of overseas production sites



The number of production sites in overseas turned upward again in FY2016 and consecutively increased in FY2017 by 30 sites (in China by 13, Europe by 7, ASEAN by 6) compared with previous year.

◆Performances of the member companies in the overseas by region

Upper row; FY2017, Lower row; FY2016 　　decreased、　increased

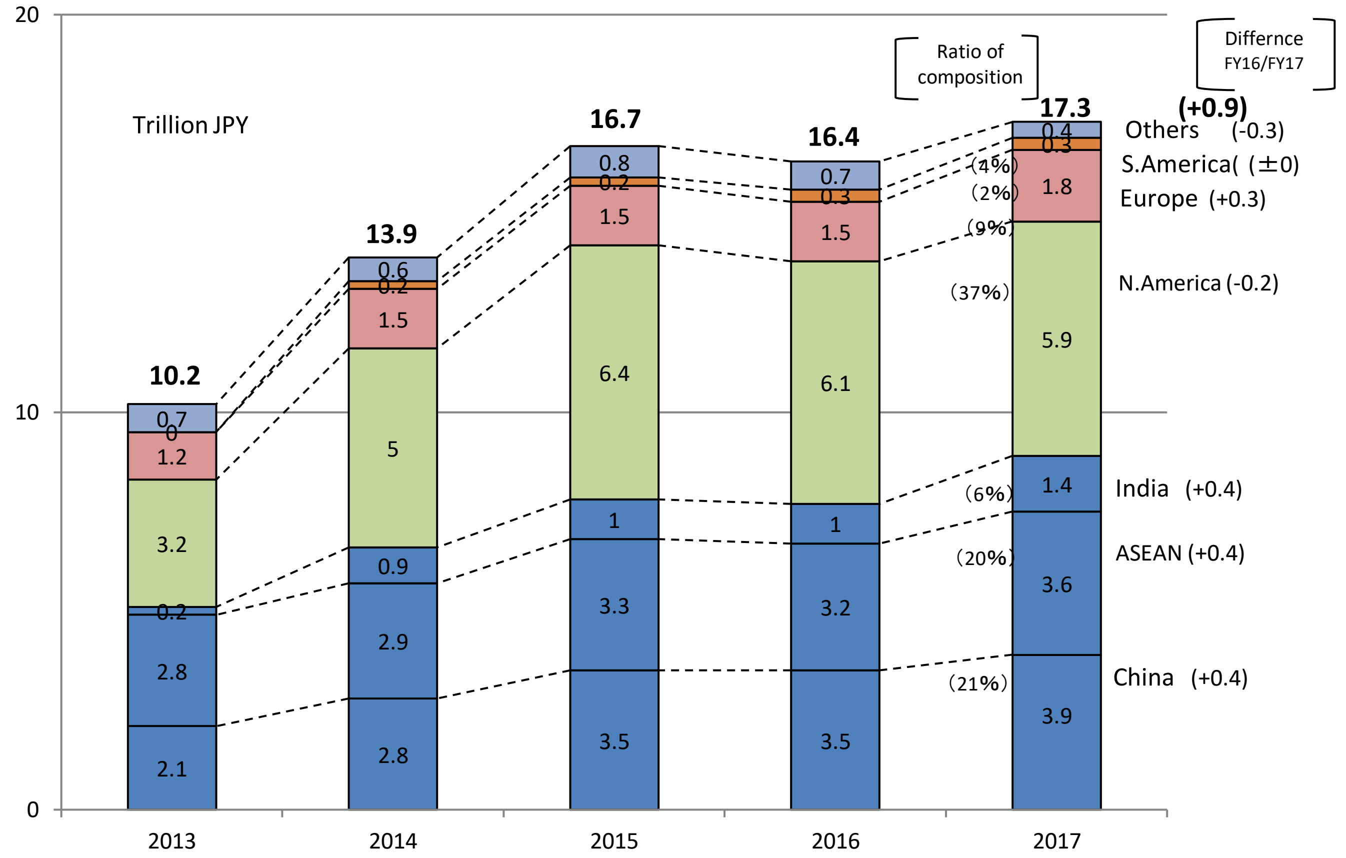
	North America	Europe	Asia	(China)	(ASEAN)	(India)	South America	Others	Total
Sales FY2017 (100 million, JPY)	**58,849**	**17,927**	**91,824**	**38,913**	**35,518**	**14,340**	**3,220**	**2,728**	**172,956**
FY2016	61,222	15,231	83,605	36,662	32,429	10,487	2,449	2,575	165,081
Sales per company (100 million, JPY)	**291**	**147**	**142**	**140**	**128**	**256**	**85**	**124**	**169**
	296	142	128	132	117	187	68	103	160
Ratio to the domestic market in the said country *	**84.6**	**59.0**	**78.4**	**85.9**	**64.3**	**88.4**	**91.1**	**41.4**	**78.9**
	84.4	51.3	77.8	84.8	64.5	88.5	95.4	50.7	77.6
Ratio to Japanese OEMs in the said country (%)	**67.1**	**14.8**	**58.9**	**64.2**	**53.0**	**59.4**	**61.0**	**34.8**	**58.5**
	63.8	16.8	54.7	57.3	52.4	59.8	62.6	33.2	55.4
Ratio to the national OEMs in the said country (%)	**9.4**	**39.0**	**10.5**	**13.8**	**1.3**	**20.1**	**26.5**	**6.6**	**12.2**
	8.5	29.9	13.5	17.8	2.9	19.5	28.9	7.5	13.2
Ratio to others (to repair etc.%)	**8.1**	**5.1**	**9.0**	**7.9**	**10.0**	**8.9**	**3.6**	**0.0**	**8.2**
	12.1	4.5	9.6	9.8	9.3	9.2	3.9	10.0	10.0
Ratio to export *	**15.5**	**41.1**	**21.7**	**14.2**	**35.8**	**11.6**	**8.9**	**43.0**	**21.2**
	15.6	48.7	22.2	15.2	35.5	11.5	4.6	49.3	22.4
Ratio to export to other than Japan (%)	**15.2**	**34.5**	**10.8**	**5.6**	**17.5**	**8.9**	**5.1**	**43.0**	**14.2**
	15.0	43.5	11.4	5.5	19.6	8.9	4.4	47.4	15.8
Ratio of the companies in the surplus in a single year (%)	**67.9**	**74.1**	**87.8**	**91.3**	**86.1**	**80.4**	**65.5**	**89.5**	**81.5**
	78.2	75.0	83.8	87.8	83.1	64.6	48.1	85.7	80.7
Ratio of the companies in the cumulative surplus (%)	**62.7**	**62.3**	**79.1**	**84.8**	**78.0**	**51.1**	**46.4**	**76.5**	**72.7**
	64.3	60.6	77.8	83.4	78.7	36.4	52.0	66.7	72.3
Ratio of the companies paying dividends (%)	**31.8**	**27.6**	**56.2**	**64.6**	**53.4**	**21.4**	**18.5**	**41.2**	**46.4**
	34.8	27.4	54.6	62.9	51.2	22.7	11.5	33.3	46.0
Local contents (%)	**72.8**	**75.5**	**73.6**	**76.9**	**70.9**	**67.2**	**71.8**	**75.5**	**74.6**
	73.1	74.5	75.2	76.8	73.3	74.2	71.2	67.4	74.4
Total number of employees	**276,041**	**117,467**	**809,524**	**245,527**	**448,938**	**97,129**	**39,240**	**53,059**	**1,258,701**
	242,385	120,826	681,336	200,392	386,913	77,751	37,780	32,839	1,117,697
No. of emplyees per company	**955.2**	**711.9**	**840.6**	**613.8**	**1,061.3**	**1,229.5**	**817.5**	**1,965.1**	**851.0**
	918.1	794.9	857.0	609.1	1,060.0	1,160.5	921.5	1,216.3	861.1
Sales per employee (Million,JPY)	**27.7**	**19.8**	**14.9**	**19.9**	**11.1**	**16.2**	**14.3**	**8.7**	**18.0**
	30.5	19.0	13.5	18.6	9.8	13.3	12.4	9.4	17.4

* (%, weighted average)

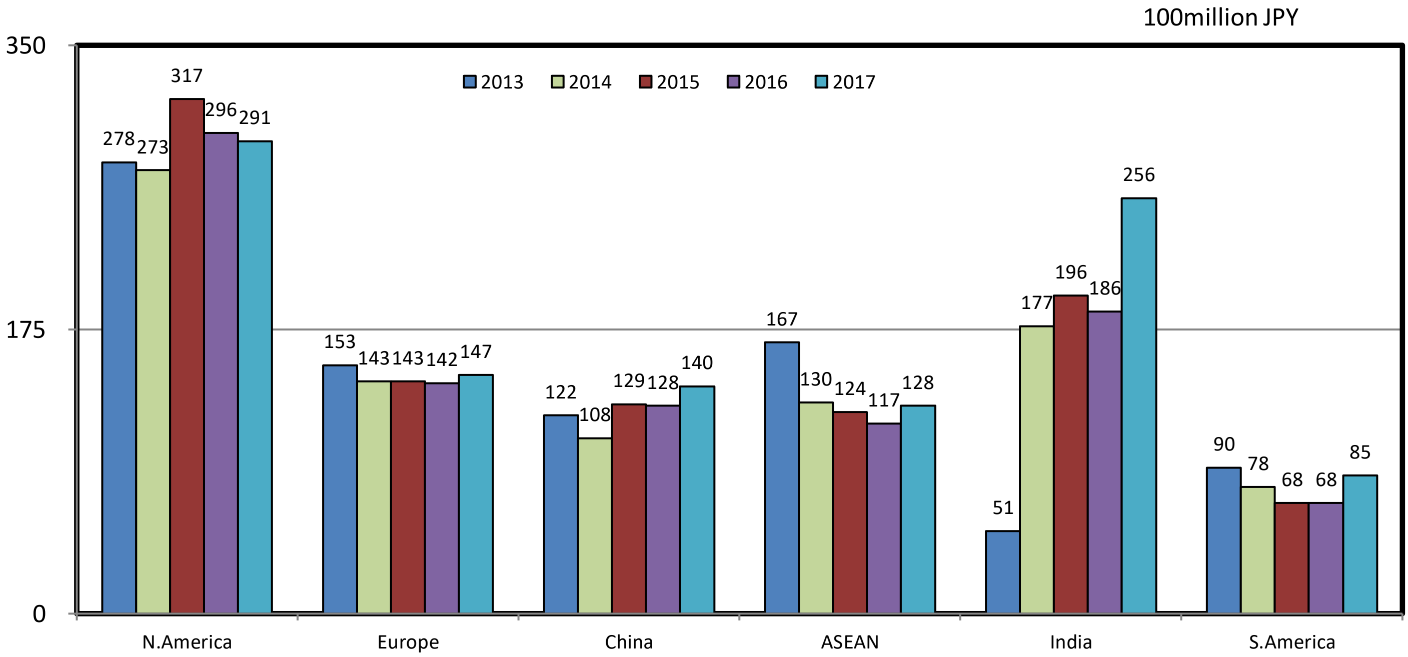
◆Performances of the member companies in the overseas in the past 5 FY

＜Sales by region＞

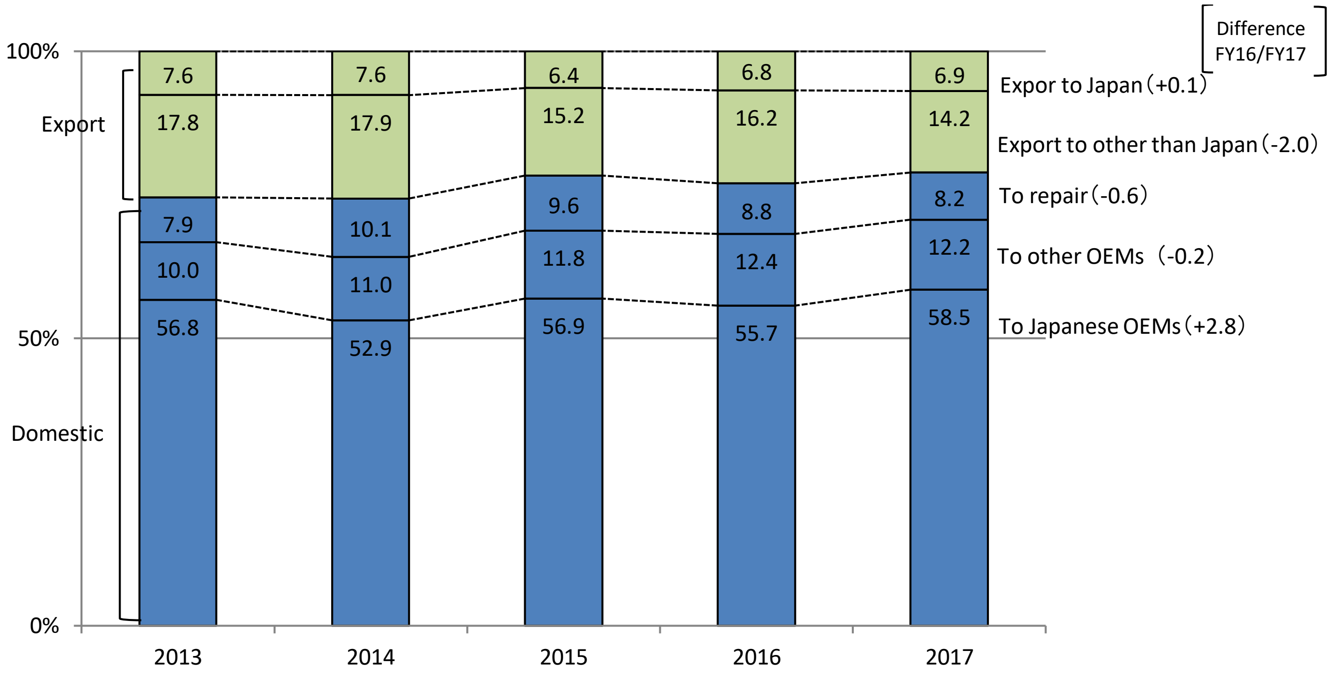
Due to the depreciation tendency of JPY compared to previous year (JPY/US$;109 in 2016→112 in 2017), sales have slightly increased in FY2017 by 5.5% to JPY17.3 trillion.



＜Sales per company by region＞

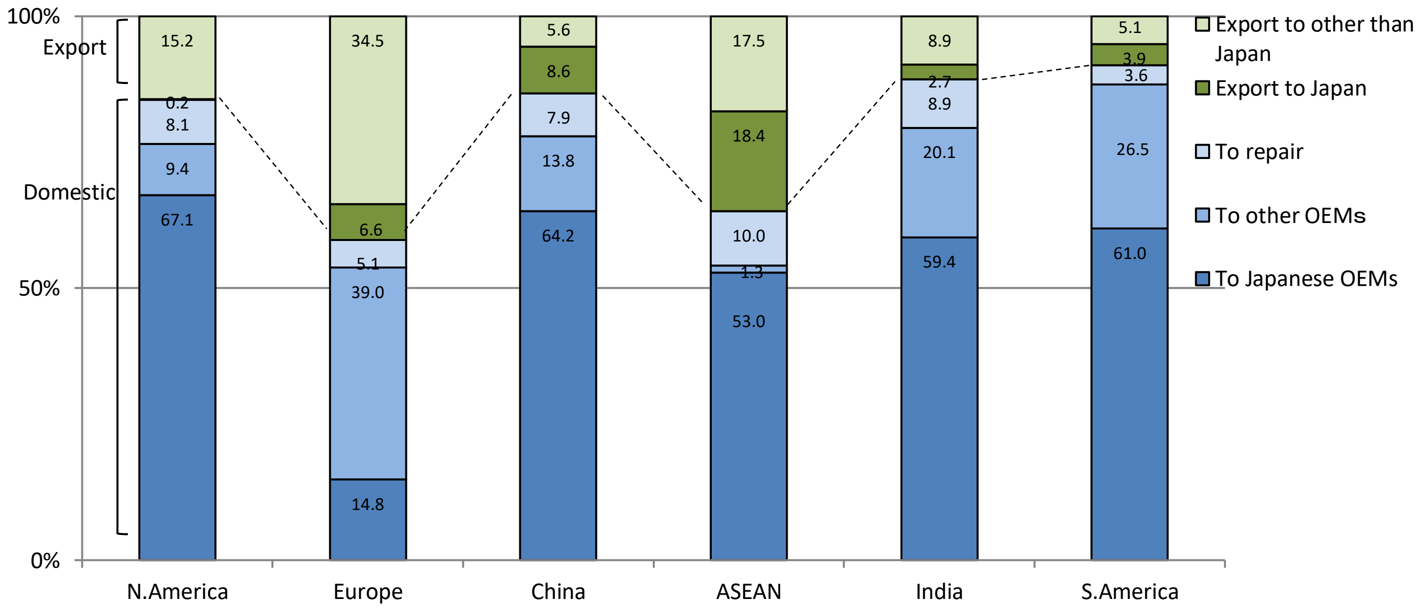


＜Sales by customer＞



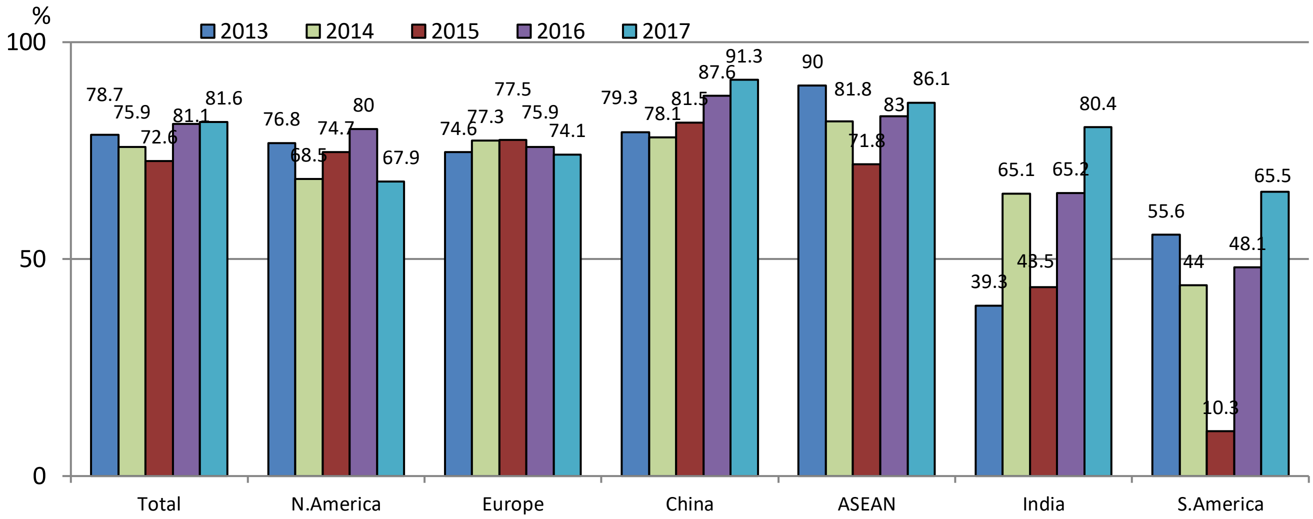
In FY2017, the dependency on Japanese OEM s increased by 2.8%, on the contrary the dependency on non-Japanese OEMs and on export decreased slightly.

＜Sales by region and customer in FY2017＞



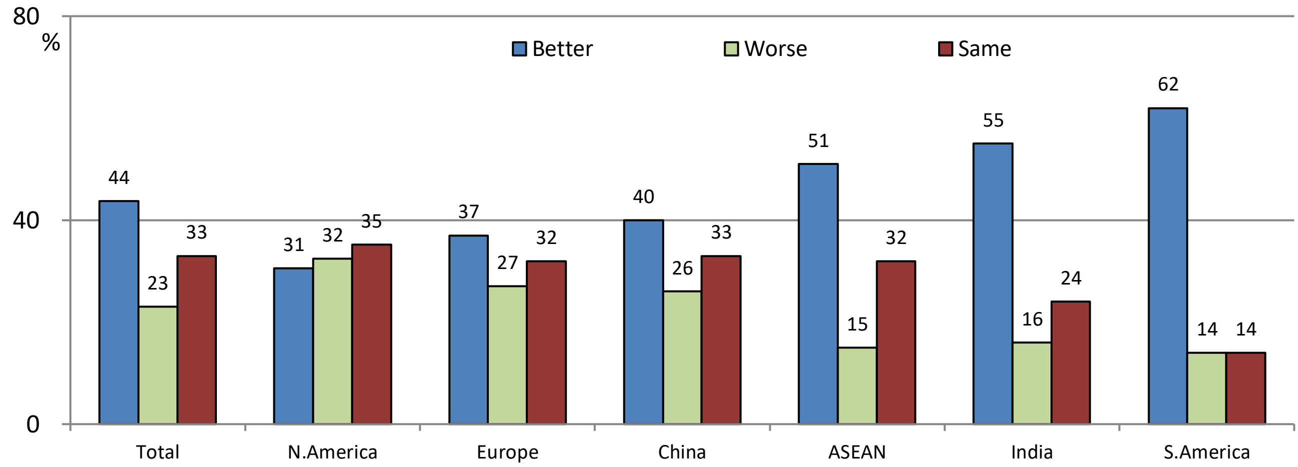
The dependence on Japanese OEMs in most areas except in Europe were high. The sales to the local OEMs were active in Europe, South America, India, China. In ASEAN the ratio of export to Japan was relatively high. In Europe, ASEAN, North America, regional exports and mutual complements were active.

＜Ratio of profitable companies in a single year＞

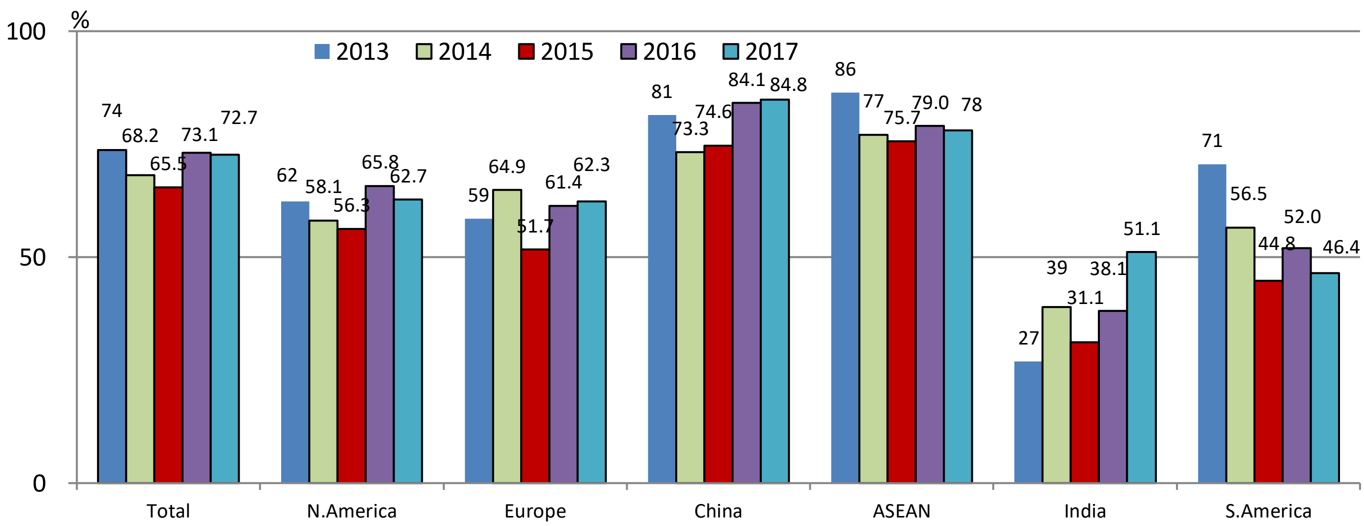


In China and ASEAN, more than 90% of companies resulted in the surplus, also in India and South America there have been outstanding improvement after the struggle in 2015.
The ratio of surplus companies as a whole exceeded 80% for 2 years in a row.

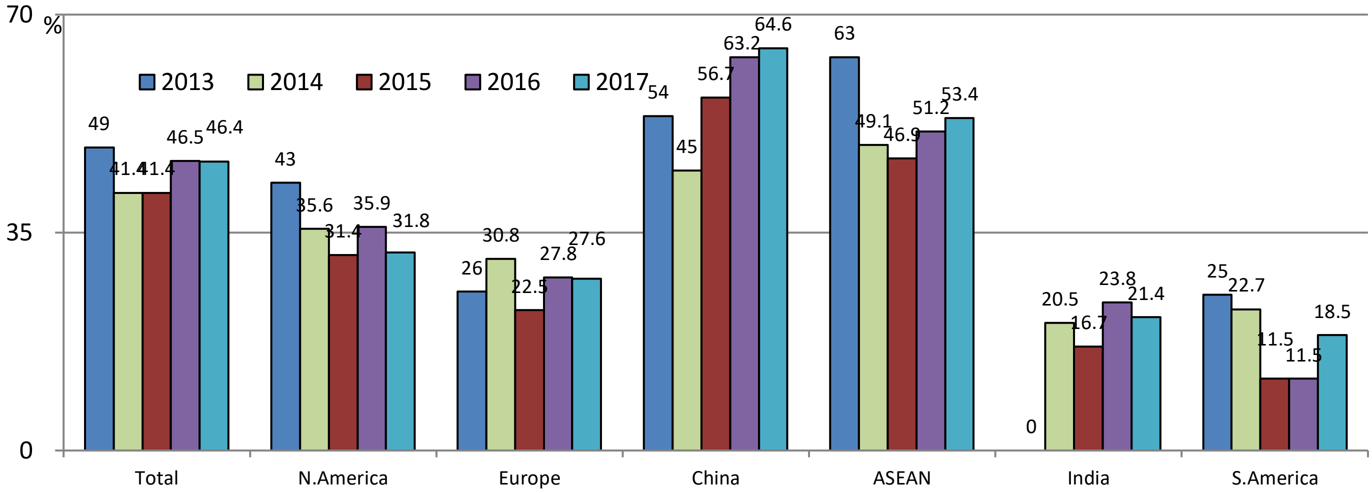
＜Business confidence of the profitable companies in a single year by region(compared to the previous FY＞



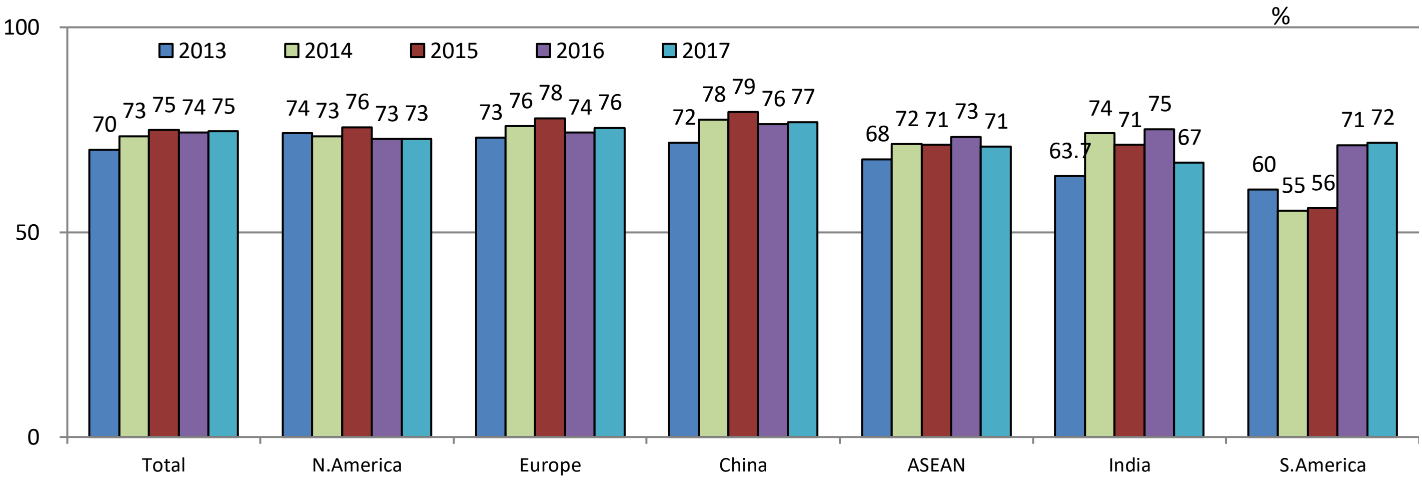
＜Ratio of the accumulated surplus companies by region＞



＜Ratio of the companies paying dividends by region＞

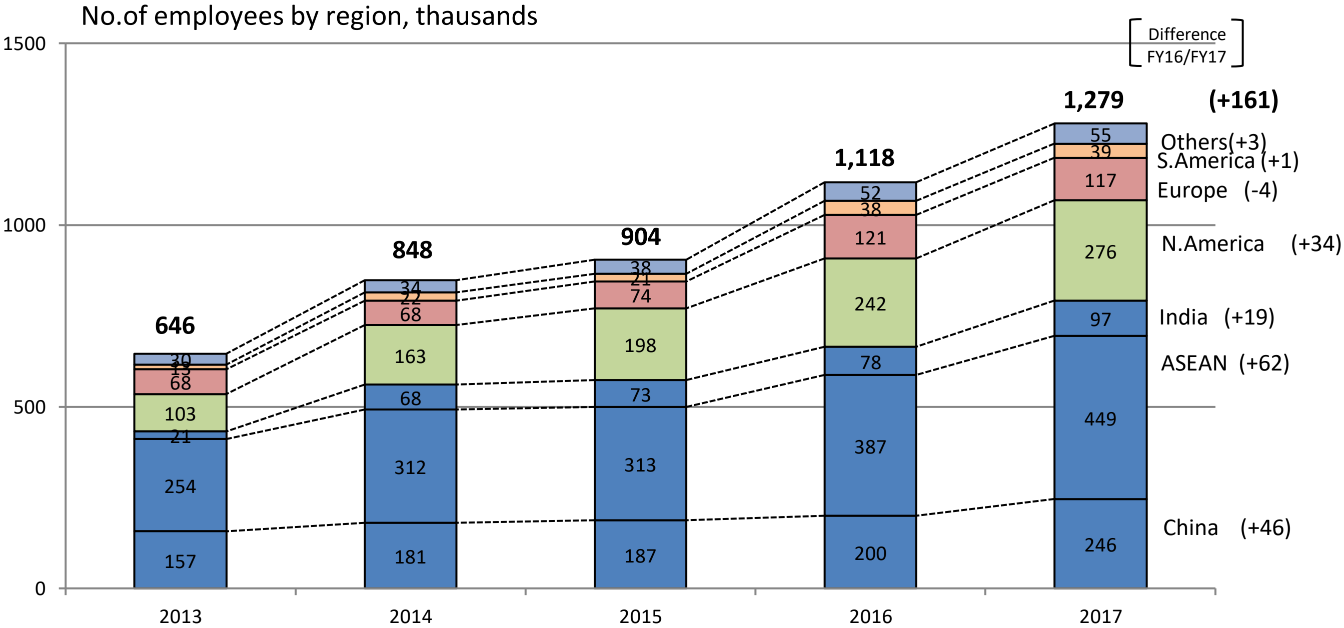


＜Local procurement ratio by region＞

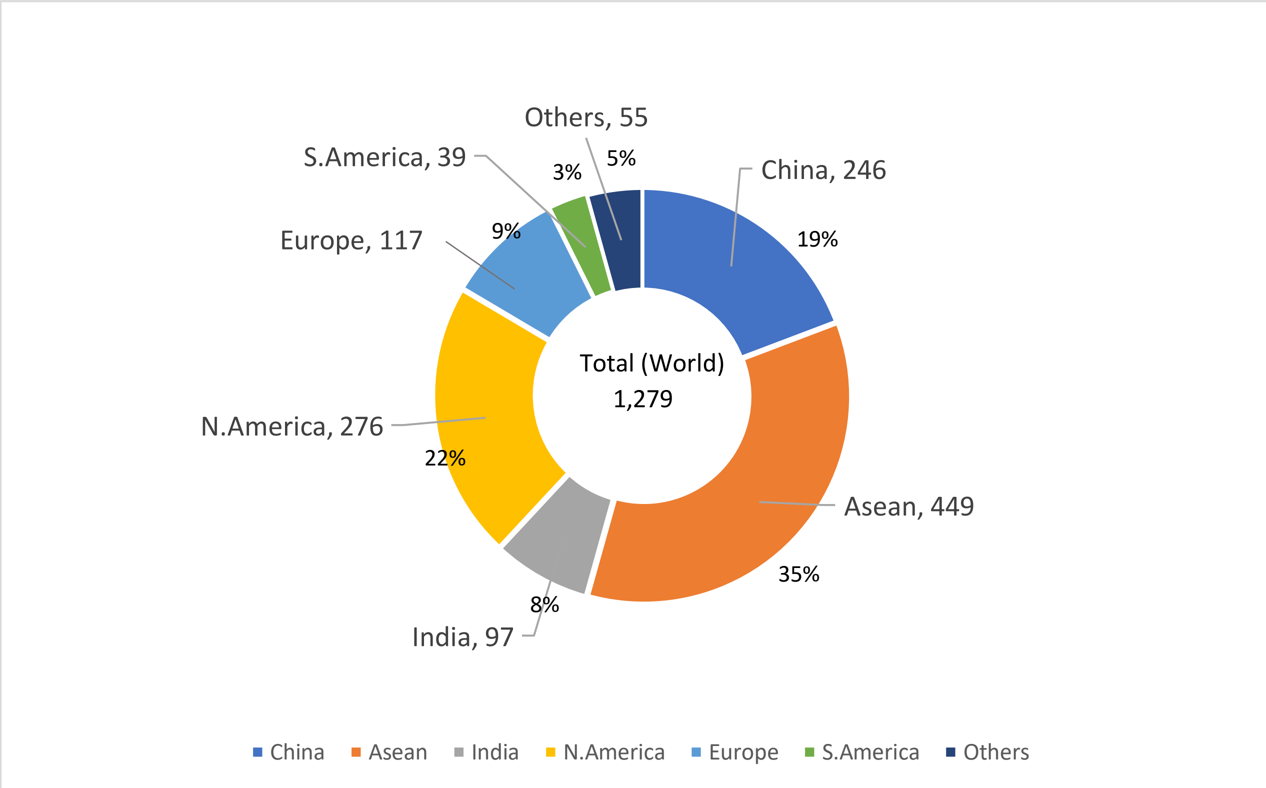


The local contents have risen in China, Europe, S. America except in India, keeping around 75% overall.

＜ Number of employees by region ＞



＜No.of employees by region in FY2017＞



＜Sales per employees by region(FY2016)＞