

# Research on Overseas Operations by Member Companies (FY2019)

Purpose of the survey:

- ① **To generate statistical data showing the contribution to the global economy**  
of Member companies (Japanese automotive parts manufacturer )
- ② **To identify common issues and reflecting it in JAPIA projects**  
from overseas business development of member companies
- ③ **To reduce direct questions to individual companies**  
by addressing in published materials with overseas business trends in  
the components industry in general and general questions

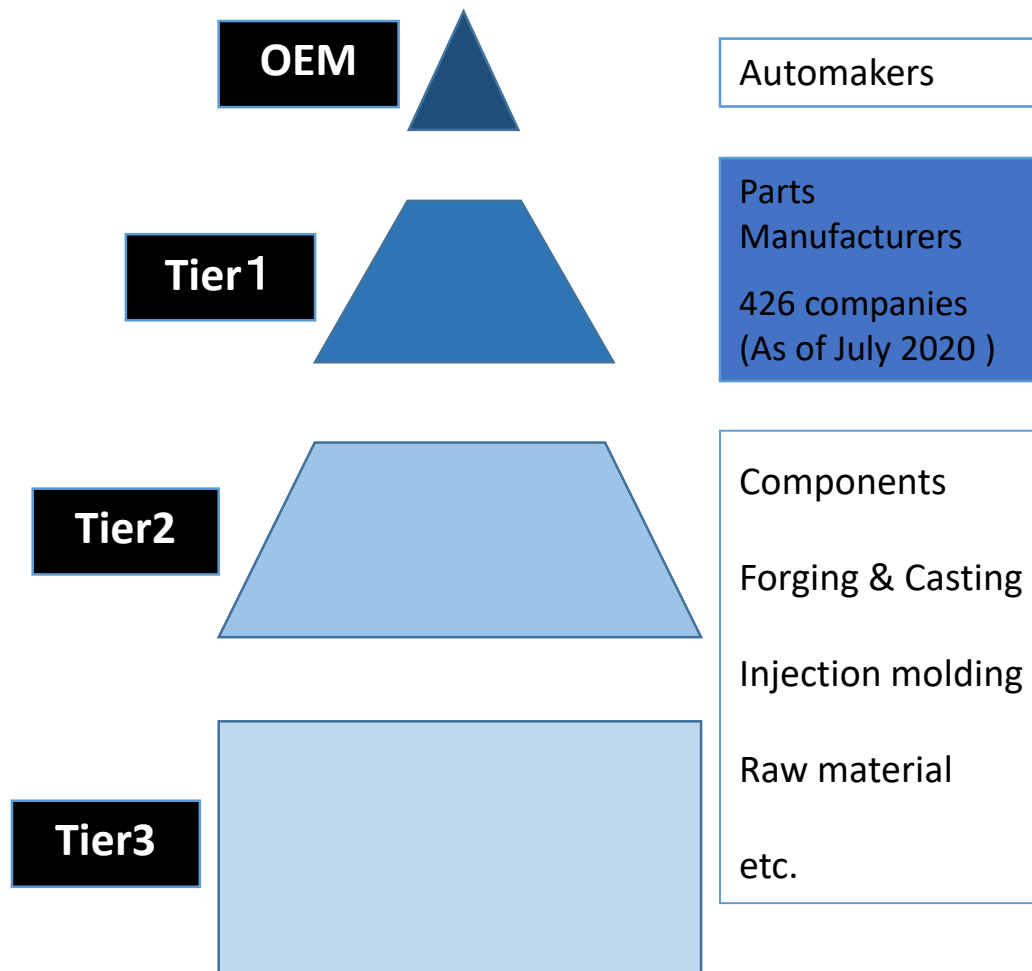
Japan Auto Parts Industries Association

International Committee

December 9, 2020

1. Overview of this Year's Survey
2. Overseas Expansion and Employment Status
3. Status of Overseas Sales
4. Profit by Region
5. Local Procurement Rate by Region
6. Survey of Topics for this Year
7. Overall Summary

# 1. Overview of this Year's Survey



|                            | Current Year                                                                 | Previous Year                                                                |
|----------------------------|------------------------------------------------------------------------------|------------------------------------------------------------------------------|
| Time of survey             | July to September 2020                                                       | June to August 2019                                                          |
| Number of target companies | 426 companies                                                                | 436 companies                                                                |
| Survey target period       | FY 2019                                                                      | FY 2018                                                                      |
| Response rate              | 79.0% (214/271)<br>92 small and medium-sized businesses and 179 big business | 77.4% (220/284)<br>99 small and medium-sized businesses and 185 big business |

\*The denominator is the number of member companies with overseas corporation.

# 1. Overview of this Year's Survey

## Number of Overseas Subsidiaries

|                   | North America | Europe | China | ASEAN | India | Others | Total |
|-------------------|---------------|--------|-------|-------|-------|--------|-------|
| 2019              | 540           | 367    | 656   | 723   | 136   | 309    | 2,731 |
| 2018              | 548           | 357    | 658   | 718   | 135   | 309    | 2,725 |
| Number of changes | -8            | +10    | -2    | +5    | +1    | ±0     | +6    |

New investment: +87, Dissolution/withdraw: -30  
Overall, including change of the number of members : +6

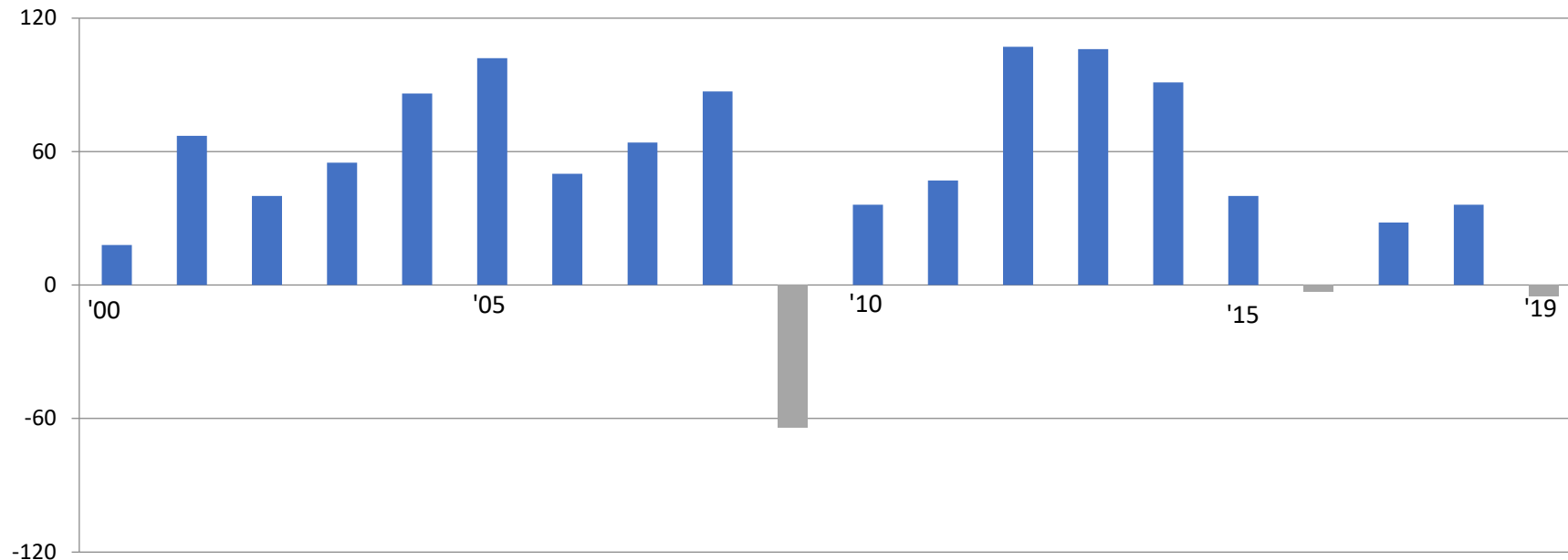
## Breakdown by function of overseas Subsidiaries (Target local operation sites 2,731)

|                                  |      | North America | Europe | China | ASEAN | India | Others | Total | Number of changes |
|----------------------------------|------|---------------|--------|-------|-------|-------|--------|-------|-------------------|
| Production function              | 2019 | 398           | 221    | 533   | 581   | 115   | 197    | 2,045 | -5                |
|                                  | 2018 | 402           | 221    | 539   | 574   | 115   | 199    | 2,050 |                   |
| Sales function                   | 2019 | 106           | 117    | 88    | 124   | 24    | 104    | 563   | 147               |
|                                  | 2018 | 82            | 82     | 56    | 95    | 13    | 88     | 416   |                   |
| Management and control functions | 2019 | 35            | 34     | 27    | 18    | 3     | 6      | 123   | —                 |
|                                  | 2018 | —             | —      | —     | —     | —     | —      | —     |                   |
| Design and development functions | 2019 | 21            | 29     | 34    | 25    | 7     | 8      | 124   | —                 |
|                                  | 2018 | —             | —      | —     | —     | —     | —      | —     |                   |
| Marketing functions              | 2019 | 11            | 16     | 11    | 6     | 3     | 10     | 57    | —                 |
|                                  | 2018 | —             | —      | —     | —     | —     | —      | —     |                   |
| Other functions                  | 2019 | 15            | 17     | 14    | 8     | 2     | 10     | 66    | —                 |
|                                  | 2018 | —             | —      | —     | —     | —     | —      | —     |                   |
| Total number of functions        | 2019 | 586           | 434    | 707   | 762   | 154   | 335    | 2,978 | —                 |
|                                  | 2018 | —             | —      | —     | —     | —     | —      | —     |                   |

Note: The survey of all functions (multiple responses) was newly started this year. Because of sales functions were counted as production functions until last year.

# 1. Overview of this Year's Survey

## Changes in the Number of Overseas Subsidiaries



|          | North America | Europe | ASEAN | China | India | Others | Total |
|----------|---------------|--------|-------|-------|-------|--------|-------|
| Increase | 9             | 11     | 18    | 15    | 5     | 6      | 64    |
| Decrease | 14            | 7      | 12    | 17    | 4     | 15     | 69    |

The number of overseas subsidiaries increased again in 2017, but due to the decrease in North America and China, resulted -5 compared to the previous year.

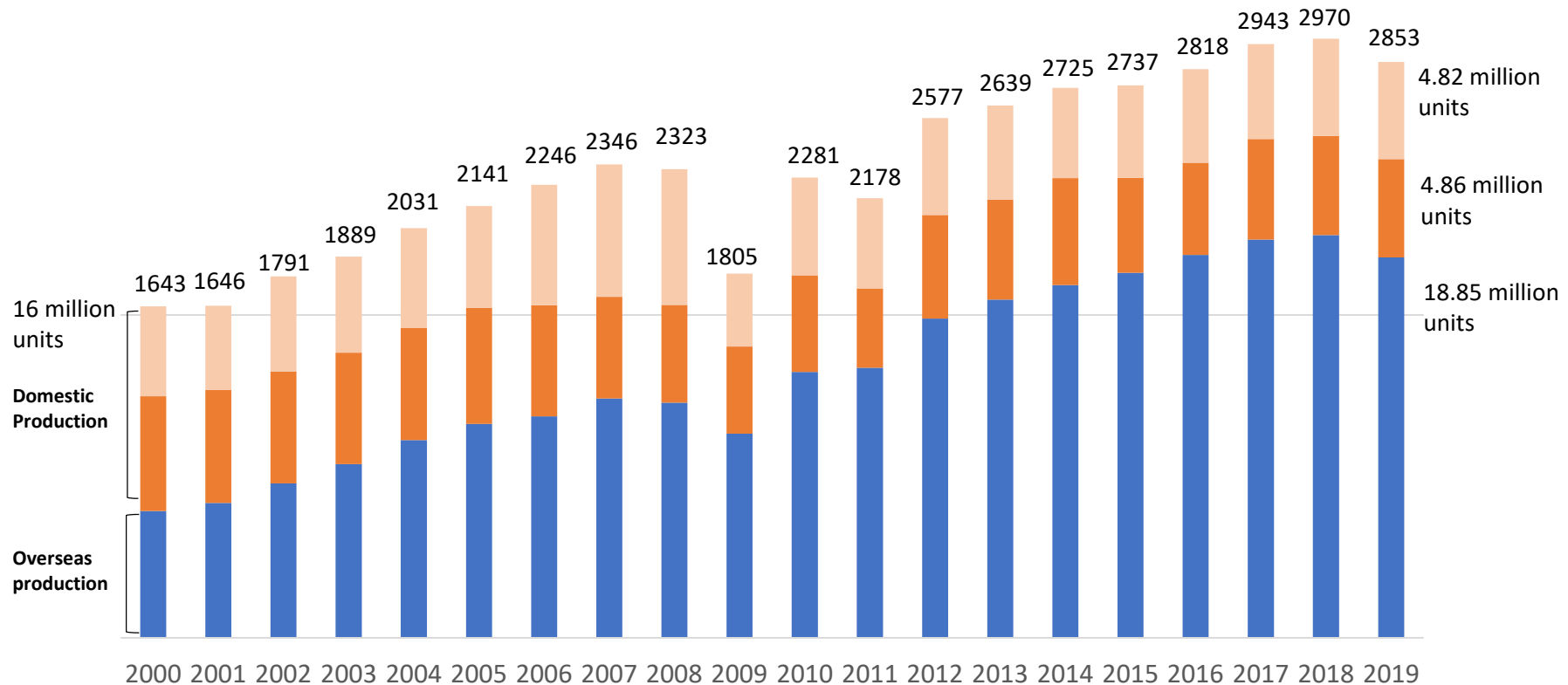
## 2. Overseas Expansion and Employment Status

Reference : Production Volume of Japanese Automakers

Source : JAPIA

■ Overseas production volume   ■ Domestic production volume – Export Volume (approximate Domestic sales volume)   ■ Export volume

32 million units



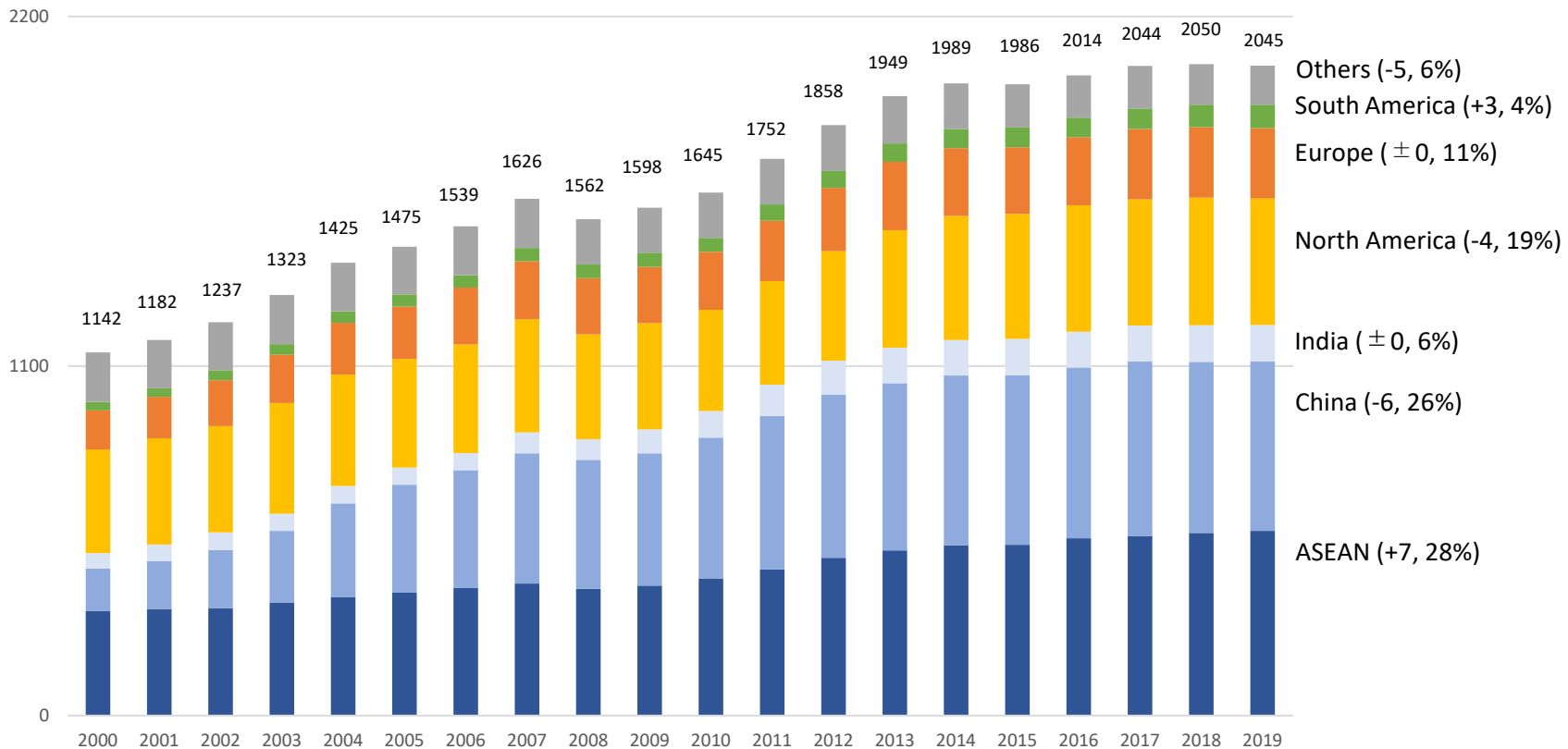
After the Financial Crisis in 2008 and the Great East Japan Earthquake in 2011, domestic production has been flat since 2012.

Overseas production is growing, especially in Asia and Africa.

## 2. Overseas Expansion and Employment Status

### Number of Overseas Subsidiaries

(number of subsidiaries)



Except during the Financial Crisis, the number of overseas subsidiaries are increased.  
(Especially in ASEAN and China)

## 2. Overseas Expansion and Employment

Number of Overseas Subsidiaries (Top countries in terms of increase)

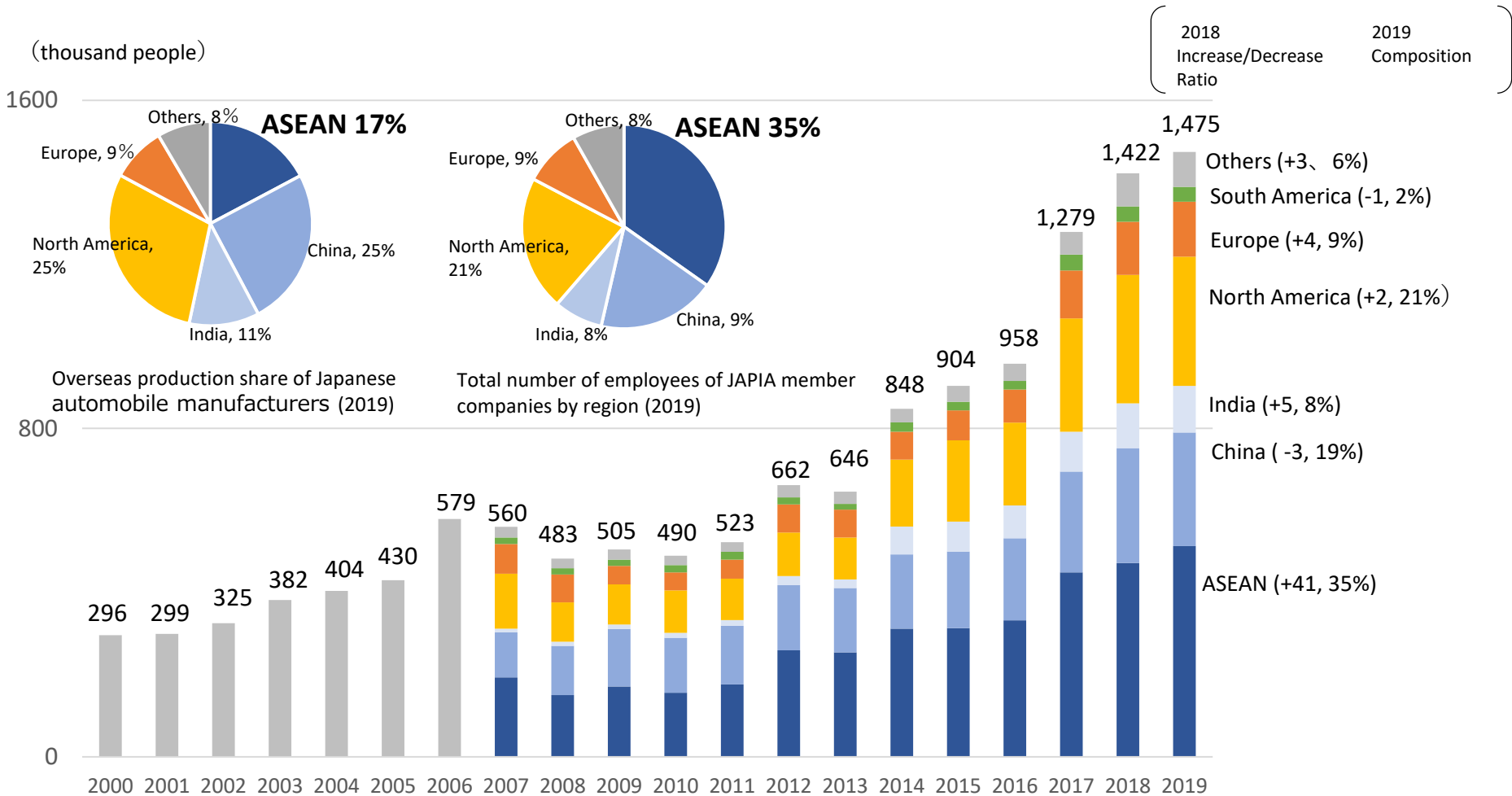
|    | 1998                    | 2009                                   | 2010                               | 2011                     | 2012                        | 2013                  | 2014           | 2015                                                              | 2016                                           | 2017                               | 2018                               | 2019                                                                                  |             |                       |
|----|-------------------------|----------------------------------------|------------------------------------|--------------------------|-----------------------------|-----------------------|----------------|-------------------------------------------------------------------|------------------------------------------------|------------------------------------|------------------------------------|---------------------------------------------------------------------------------------|-------------|-----------------------|
| 1  | China (+16)             | China (+10)                            | China (+28)                        | China (+38)              | China (+31)                 | Mexico (+16)          | Mexico (+15)   | Mexico (+6)                                                       | Indonesia (+8)                                 | China (+13)                        | Indonesia (+5)                     | Philippine (+5)                                                                       |             |                       |
| 2  | U.S.A. (+14)            | India (+9)                             | Thailand (+10)                     | India (+15)              | Indonesia (+20)             | China (+14)           | Thailand (+11) | India (+2)<br>Indonesia                                           | Thailand (+6)                                  | Thailand (+3)<br>Vietnam<br>Brazil | Mexico (+5)                        | Brazil (+3)                                                                           |             |                       |
| 3  | India (+9)              | Thailand (+7)                          | Indonesia (+9)                     | Indonesia (+14)          | Mexico (+15)                | Indonesia (+13)       | China (+8)     |                                                                   |                                                |                                    |                                    |                                                                                       | Brazil (+4) | Thailand (+2)<br>U.K. |
| 4  | Indonesia (+4)<br>Korea | Indonesia (+3)<br>Mexico               | Vietnam (+3)<br>Germany<br>Morocco | Thailand (+4)            | India (+8)                  | U.S.A. (+8)           | Vietnam (+5)   | Malaysia (+1)<br>Vietnam<br>Laos<br>Paraguay<br>France<br>Moldova | Mexico (+3)<br>Philippine<br>Cambodia<br>China | Mexico (+2)<br>U.K.<br>Italy       | Thailand (+3)<br>France<br>Morocco | Indonesia (+2)<br>Canada<br>Spain<br>Germany<br>Italy<br>Portugal<br>Poland<br>Turkey |             |                       |
| 5  |                         |                                        |                                    |                          | Brazil (+7)                 | Vietnam (+6)          | Russia (+6)    |                                                                   |                                                |                                    |                                    |                                                                                       | U.S.A. (+4) |                       |
| 6  | Thailand (+4)           | U.S.A. (+2)                            |                                    |                          | Mexico (+6)                 | Thailand (+4)         | Thailand (+5)  |                                                                   |                                                |                                    |                                    |                                                                                       | Brazil (+2) |                       |
| 7  | Asian Currency Crisis   |                                        | France (+2)                        | Germany (+4)             | Russia (+4)                 | Brazil (+5)           | Russia (+2)    |                                                                   |                                                |                                    |                                    | India (+2)                                                                            |             |                       |
| 8  |                         |                                        |                                    | Malaysia (+3)<br>Vietnam | Malaysia (+3)<br>U.S.A.     | India (+4)<br>Germany |                |                                                                   |                                                |                                    |                                    | Philippine (+1)<br>Colombia<br>El Salvador<br>Paraguay<br>Serbia                      |             |                       |
| 9  |                         | Global Financial Crisis (Lehman shock) |                                    |                          | Turkey (+3)                 | Czech (+4)            |                |                                                                   |                                                |                                    |                                    |                                                                                       |             |                       |
| 10 |                         |                                        |                                    |                          | Great East Japan Earthquake |                       |                |                                                                   |                                                |                                    |                                    |                                                                                       |             |                       |

The momentum of the expansion into China peaked around 2012, and Mexico increased from 2013 to 2016. After 2017, the trend has been to diversify, especially in ASEAN.



# 2. Overseas Expansion and Employment

## Total Number of Employees by Region

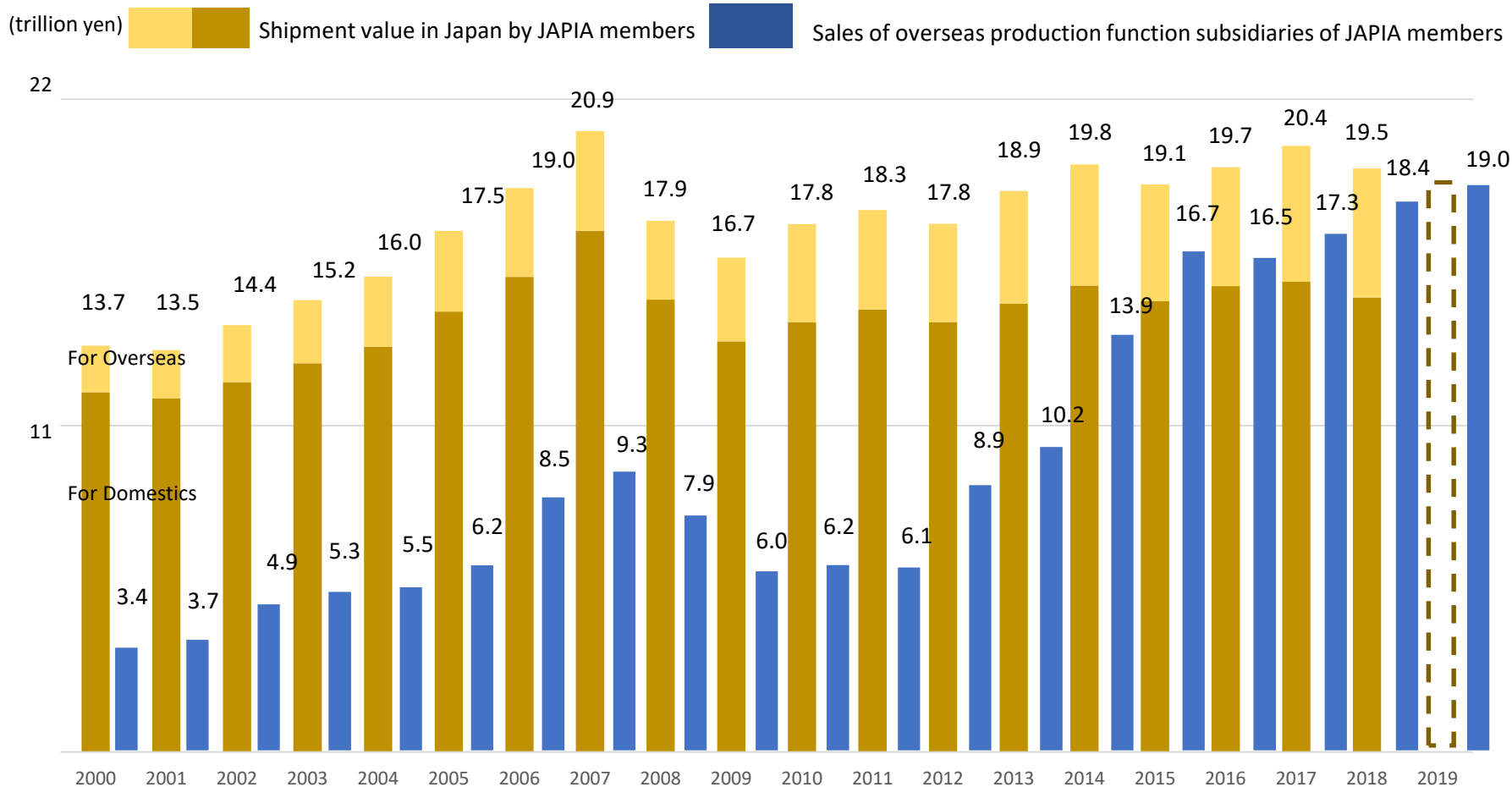


2018 Increase/Decrease Ratio      2019 Composition

Employment has been increasing since surpassing 1 million in 2017 and reached 1.48 million in 2019. (Created jobs in ASEAN that exceed the overseas market share of Japanese automakers)

# 3. Status of Overseas Sales

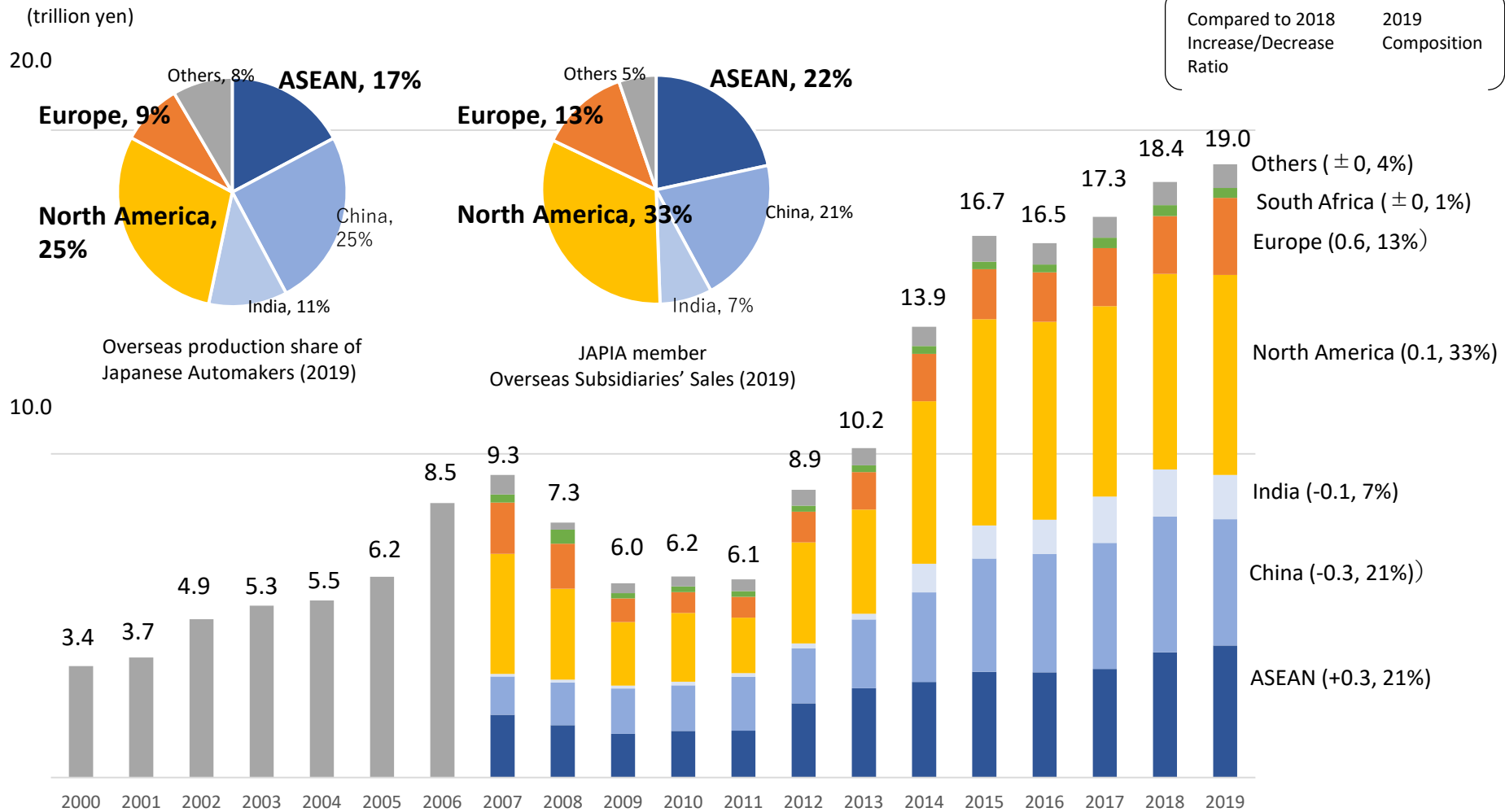
## Domestic and Overseas Sales



The yen has been appreciating year on year (2017:112yen/\$→2018:110yen/\$→2019:109yen/\$)  
 Overseas sales have grown to 19 trillion yen

# 3. Status of Overseas Sales

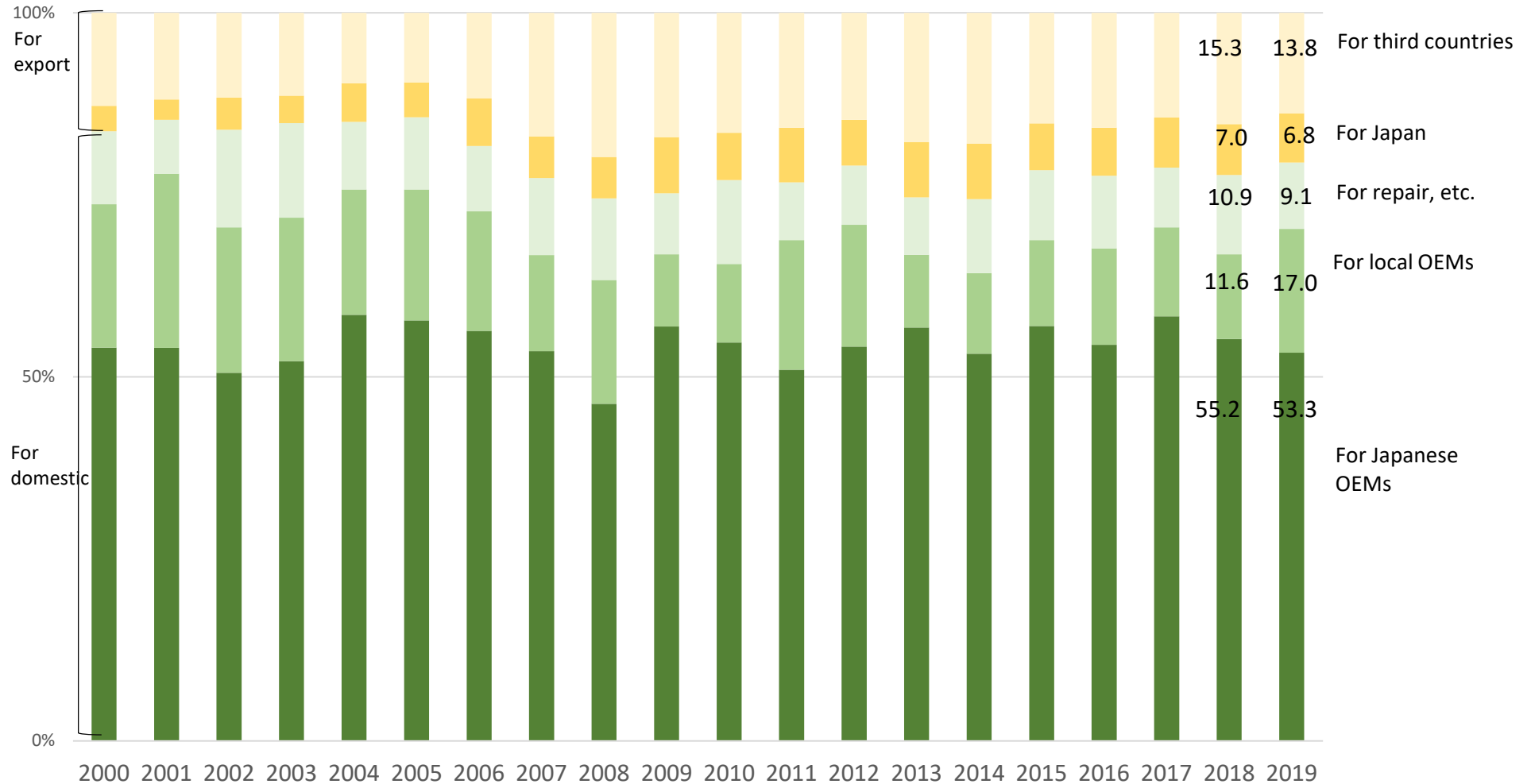
## Sales of Overseas Subsidiaries



Sales have more than tripled since the Financial Crisis and the Great East Japan Earthquake (Sales in ASEAN, North America and Europe exceed the overseas market share of Japanese automakers)

# 3. Status of Overseas Sales

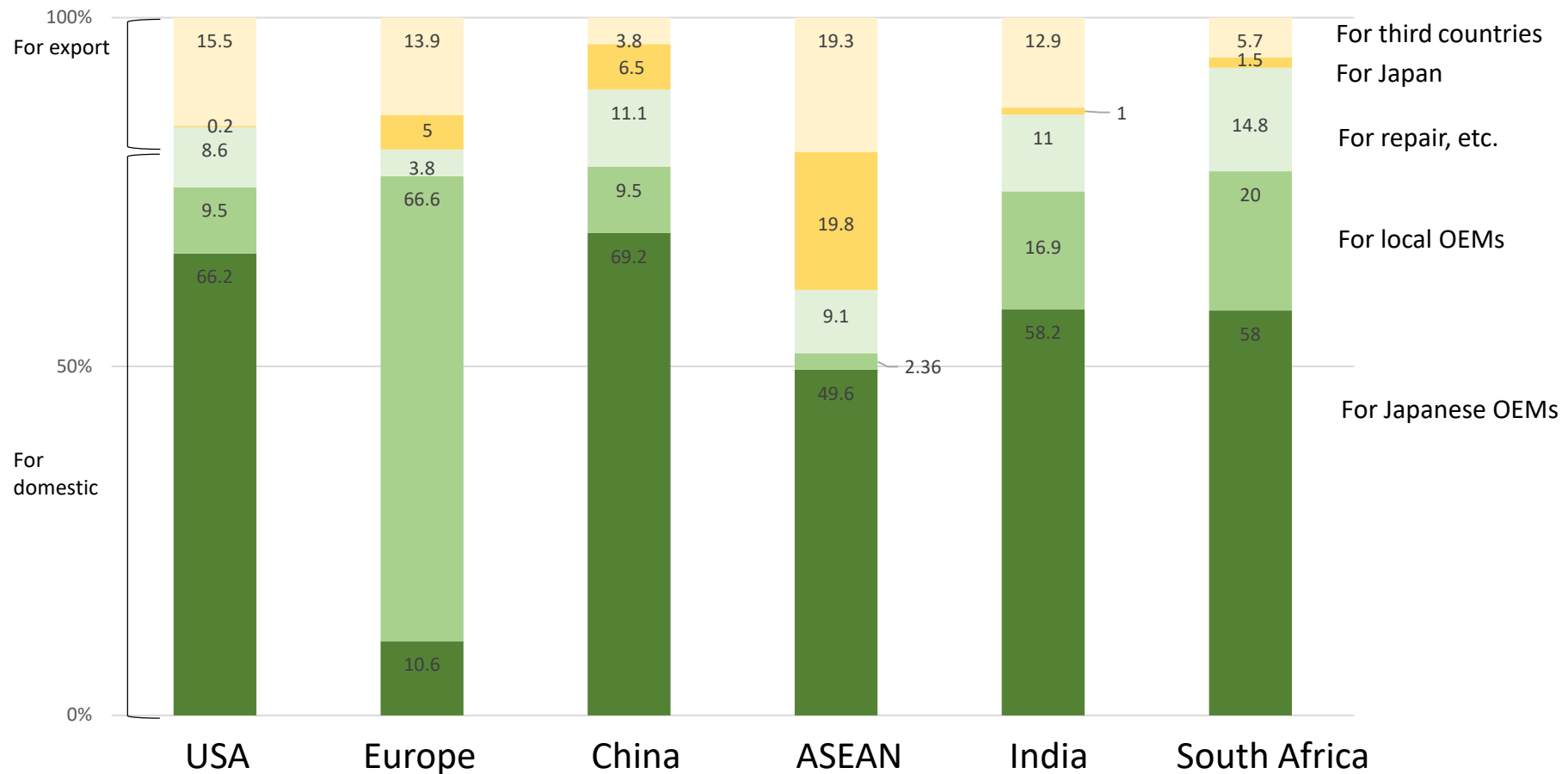
Sales Ratio by Destination from Overseas Subsidiaries



The trend is for a slight increase (+1.7%) in the domestic market compared to the export to foreign markets.

# 3. Status of Overseas Sales

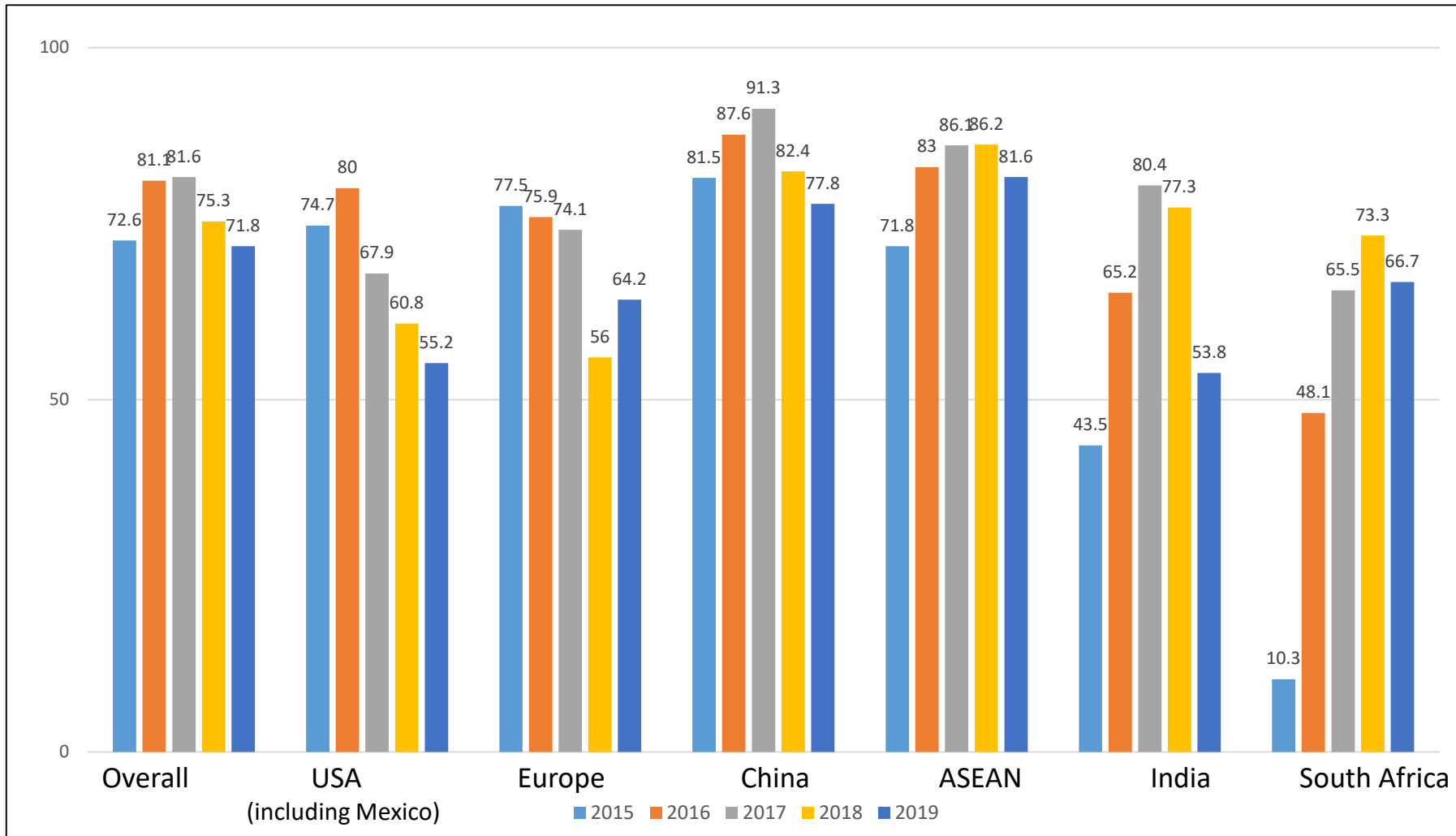
Percentage by Destination from Overseas Subsidiaries in FY2019



Dependence on Japanese OEMs is high in most regions except the Europe  
 (Sales to local OEMs are active in Europe, South America, and India, in that order)  
 Exports from ASEAN to Japan are relatively active

# 4. Profit by Region

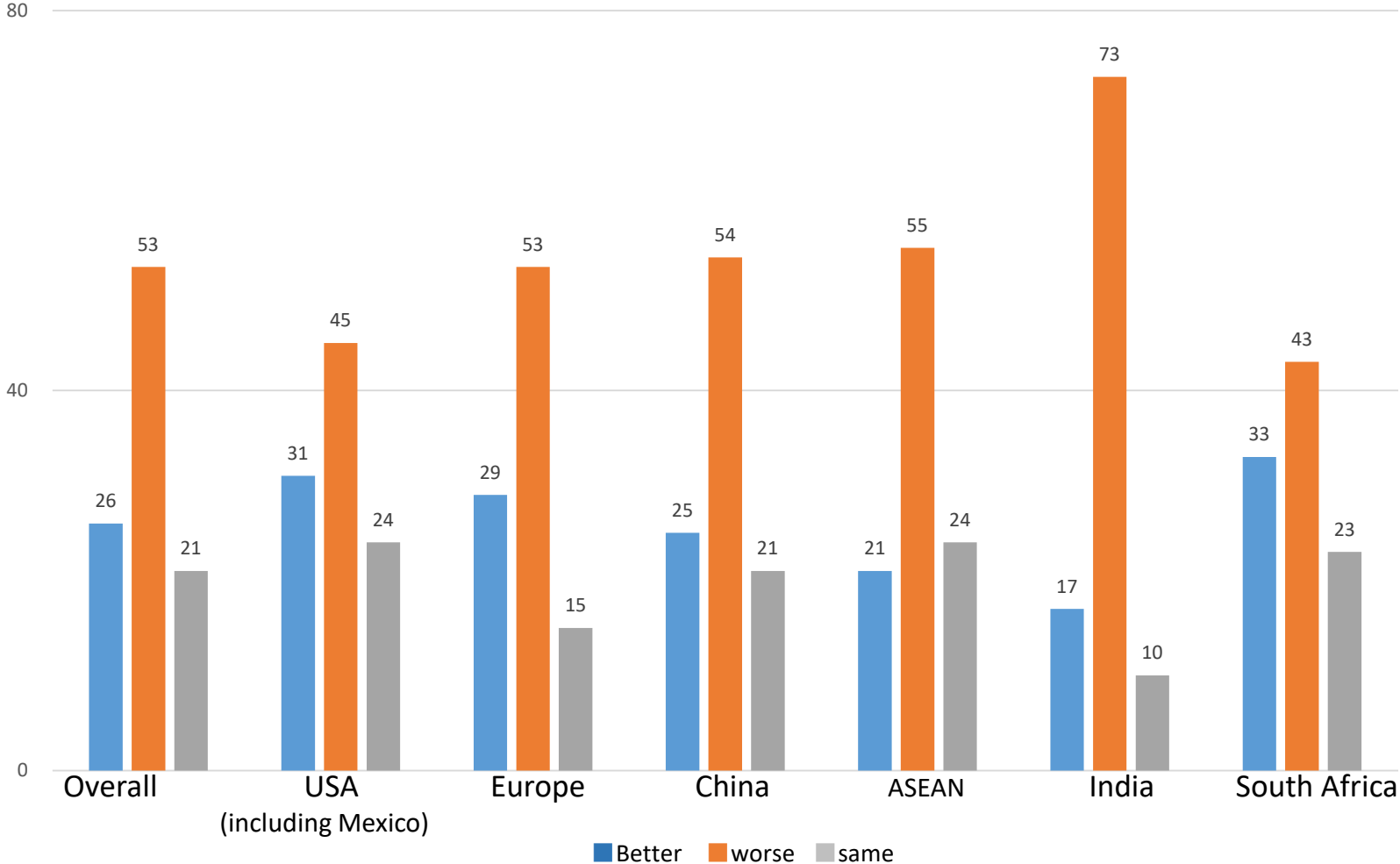
Ratio of Profitable Subsidiaries in a Single Fiscal Year



ASEAN, China, South America, and Europe have the highest percentage of profitable subsidiaries, in that order  
 All regions except Europe showed a downward trend from the previous year.

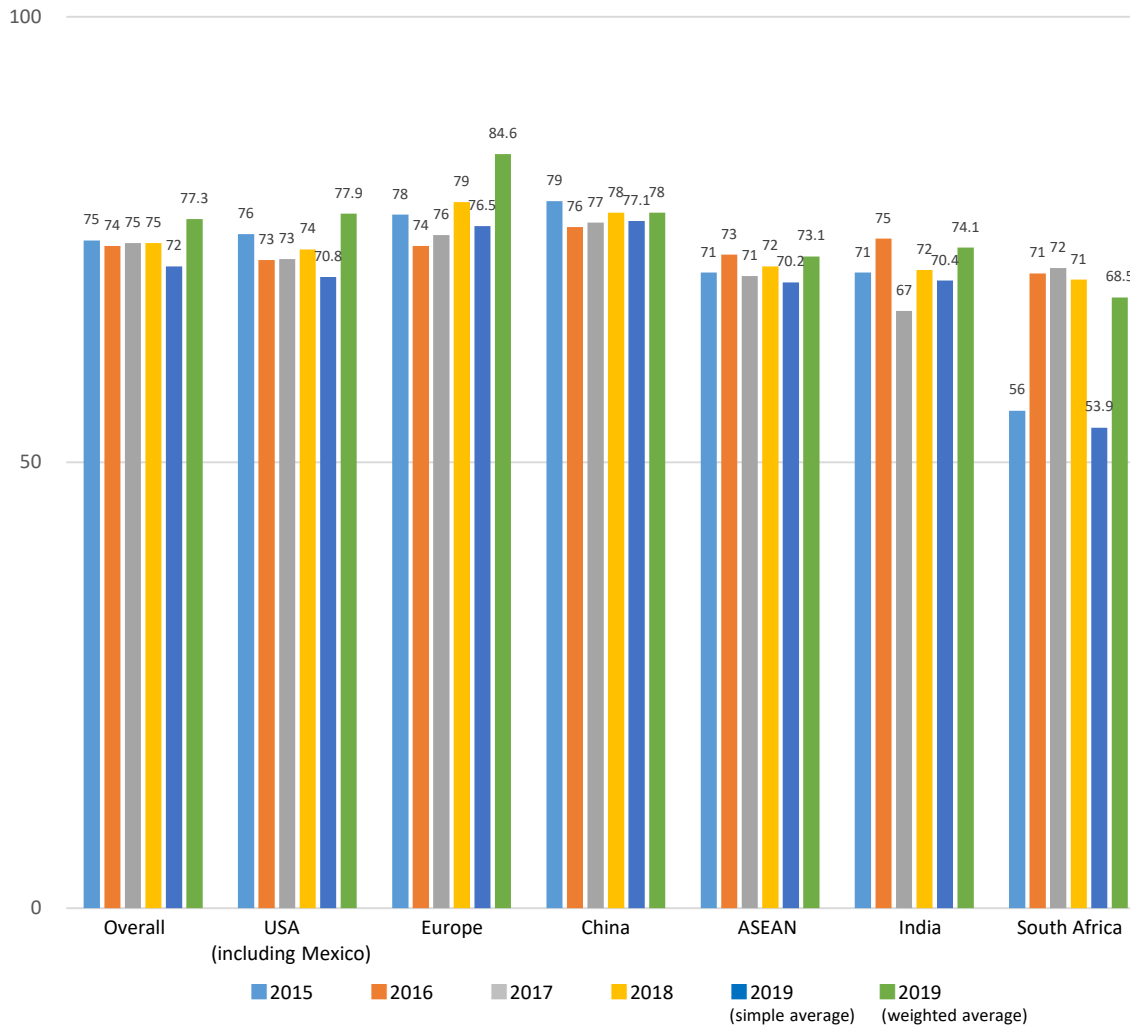
# 4. Profit by Region

Profitability



This year, 'worse' exceeded 'better' in all regions.  
(Last year, only China was 'worse')

# 5. Local Procurement Rate by Region



Note: Simple average was used until last year. The weighted average is used from this year. For the current fiscal year only, both simple and weighted averages are shown.

## Problems with Local Procurement

### <USA>

- Not cost competitive.
- There is a lot of accuracy variation.

### <Europe>

- Long lead time from Asia.
- The conditions for leaving the EU have not been decided.

### <China>

- There are few companies that meet the quality requirements.
- Struggling to procure in the Corona pandemic.

### <ASEAN>

- There are few local/Japanese companies with technological capabilities.
- Not cost competitive compared to China and Korea.
- High cost due to small quantity and variety.

### <India>

- Complex logistics laws and regulations.
- It takes time to understand the standard conditions in the drawing.

### <South Africa>

- Difficulty in hiring people.
- Local products are expensive.
- Soaring prices of imported parts due to depreciation of Brazilian currency.

Overall, the percentage remained at 70%, but declining trend in all regions



## 6. Survey of Topics for this Year ①

### ① Impact of COVID-19 on global production system

Number of companies surveyed : 271 ( Member companies with overseas subsidiaries )

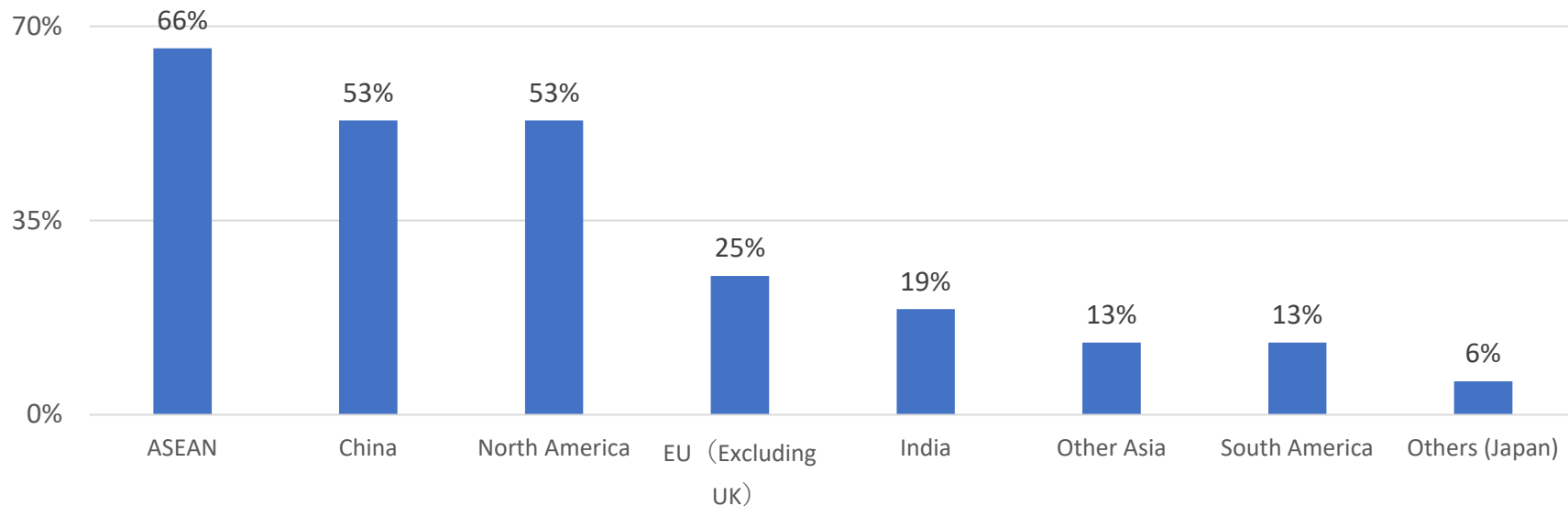
Number of companies answered : 168 (62%)

Will the company review its global production system in response to COVID-19?

Yes ..... 32 (19%)

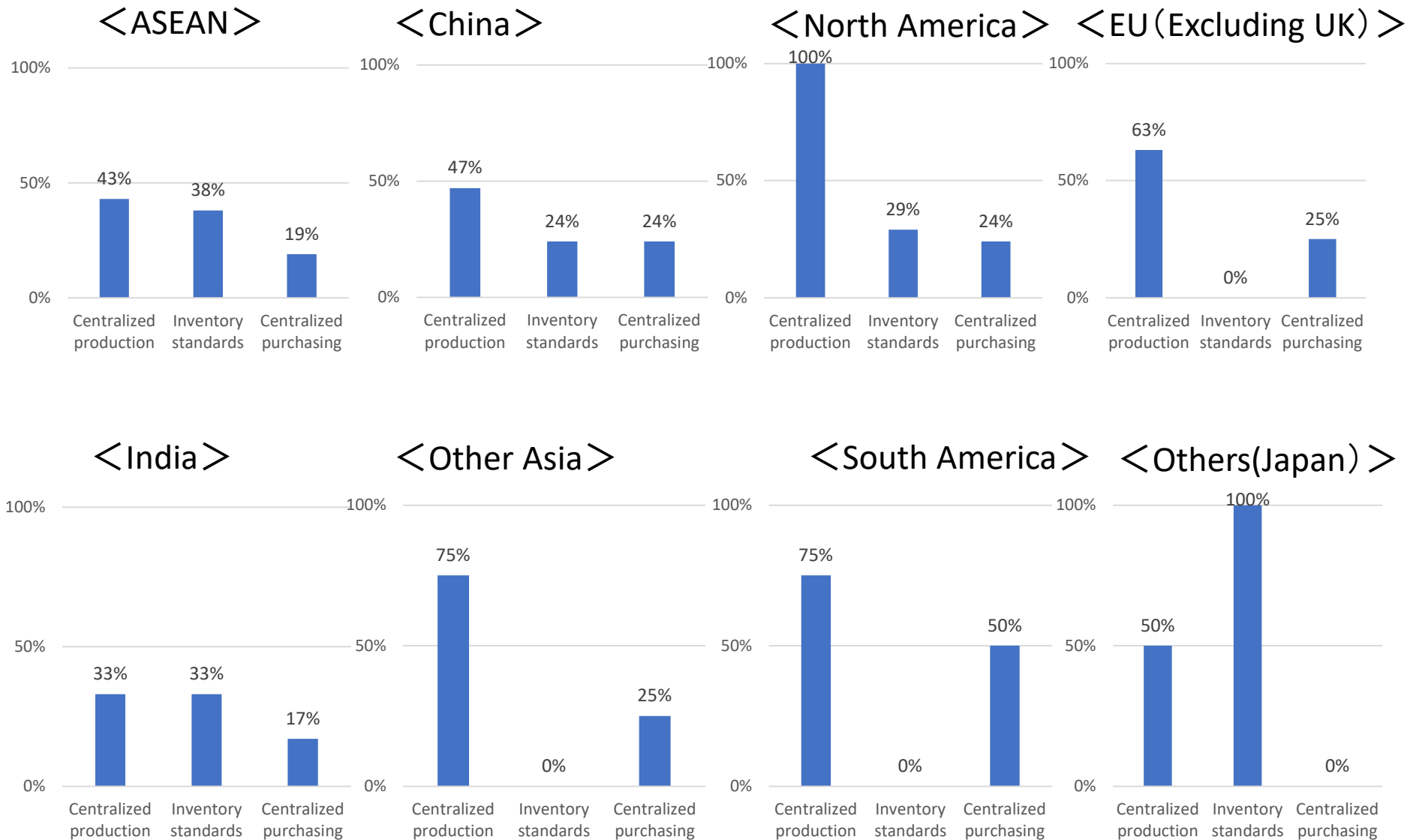
No / No answer ..... 131 (81%)

< Target countries and regions ( Multiple answers possible ) >



# 6. Survey of Topics for this Year ①

Review items by country/region ( Multiple answers possible )



## 6. Survey of Topics for this Year ①

Issues in the global production system for COVID-19

| Issues                                                                                                                                       | Number of answers<br>(Multiple answers possible) |
|----------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------|
| Market contraction/Recovery speed from COVI-19, etc.<br><b>Market uncertainty</b>                                                            | 7                                                |
| Multiple locations/Responding to requests from customers, etc.<br><b>Change of production location</b>                                       | 6                                                |
| Localization of overseas procurement, diversification of procurement risks, etc.<br><b>Changes in procurement aspects and cost increases</b> | 6                                                |
| Leaning toward protectionism/Correspondence to new technologies, etc.<br><b>Changes in the business environment</b>                          | 5                                                |
| Inadequate human resources/Increase in labor costs, etc.<br><b>Establishment of local systems</b>                                            | 5                                                |
| Delay due to spread of COVID-19's infection, etc.<br><b>Impact on logistics network</b>                                                      | 2                                                |
| Others (Compliance with standardization/Employee health management, etc.)                                                                    | 4                                                |

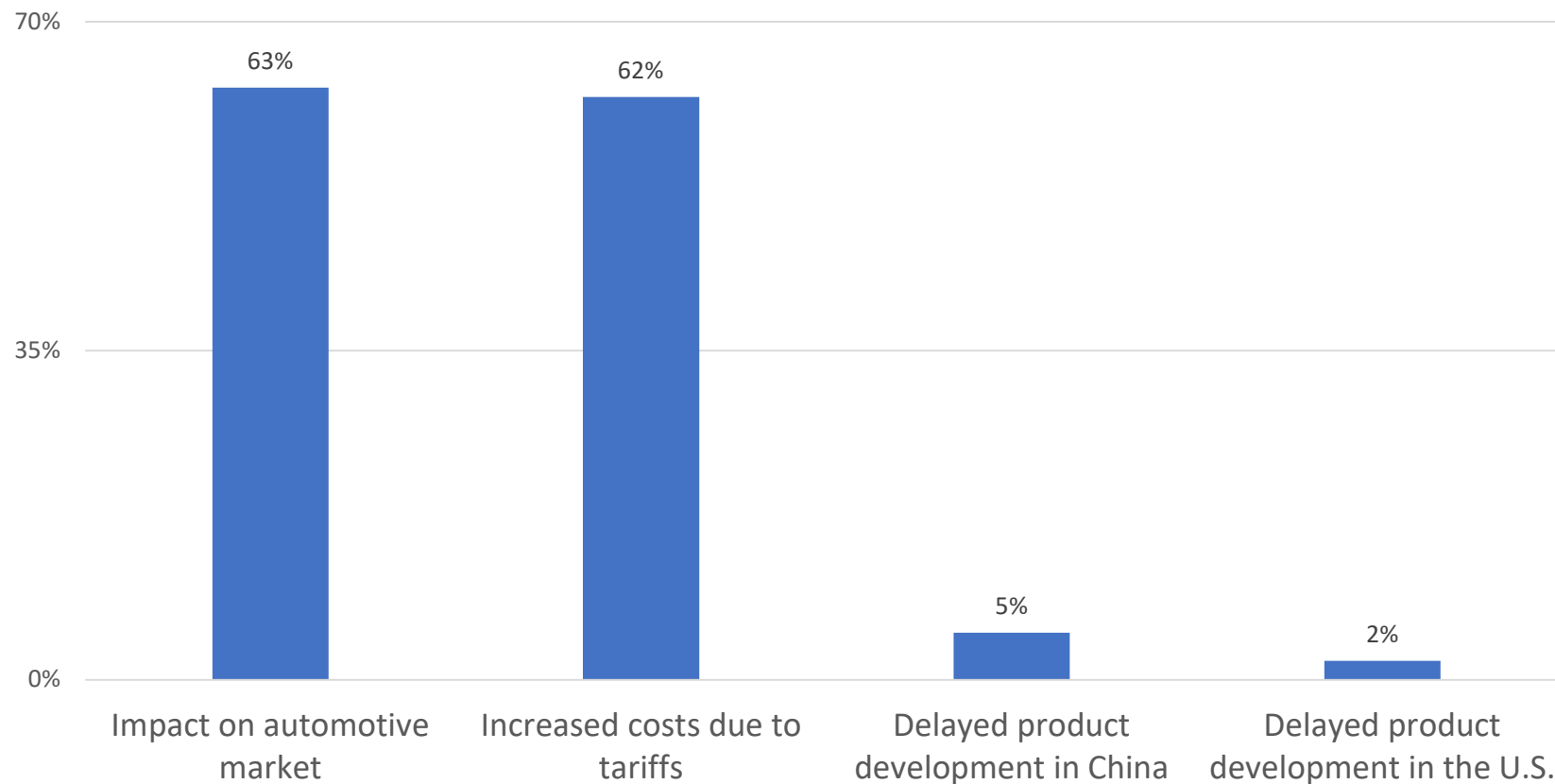
## 6. Survey of Topics for this Year ②

### ② Compliance with trade trends in each country : US-China trade conflict

Number of companies surveyed : 271 ( Member companies with overseas subsidiaries )

Number of companies answered : 131 (48)

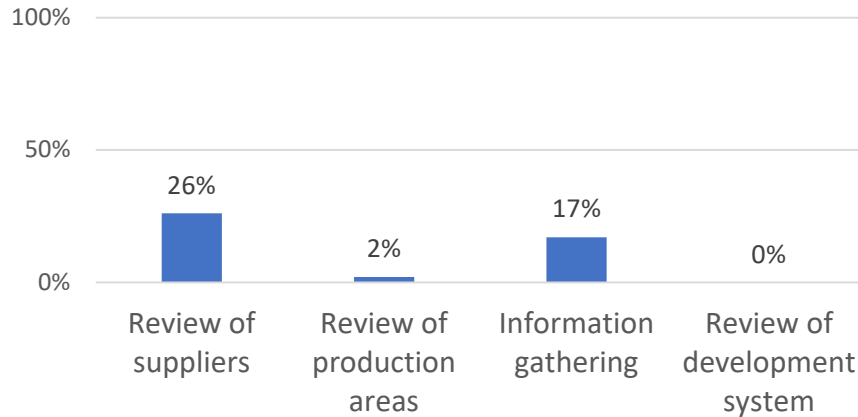
#### Issues of concern



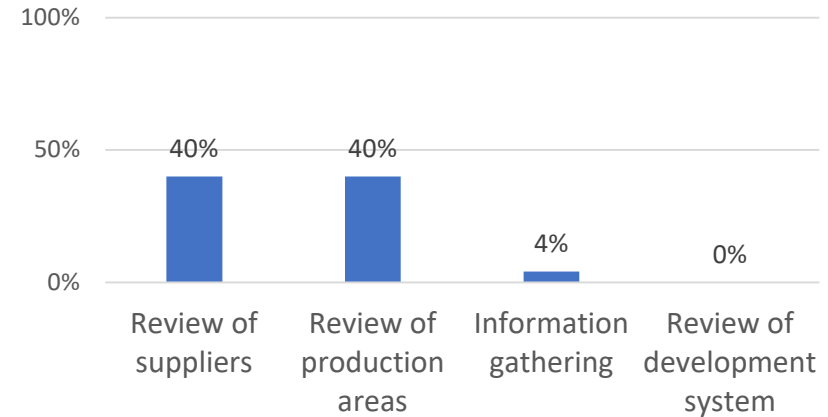
# 6. Survey of Topics for this Year ②

## Correspondence status

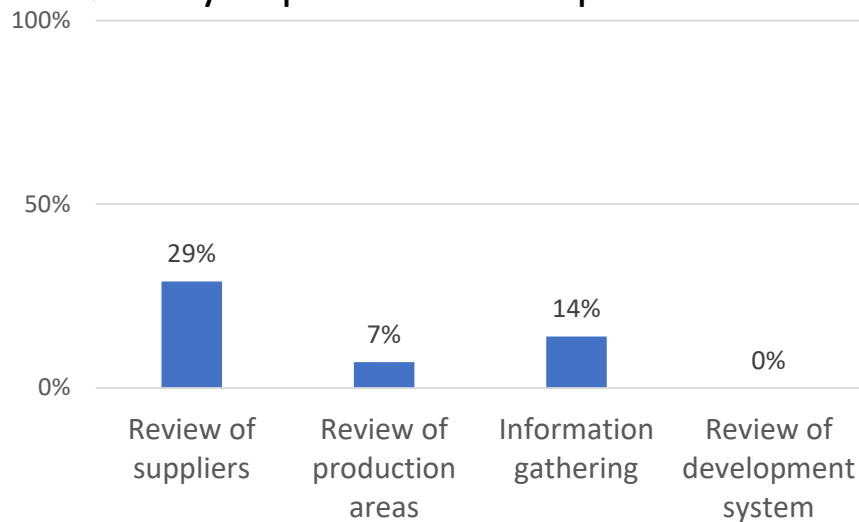
### < Impact on the automotive market >



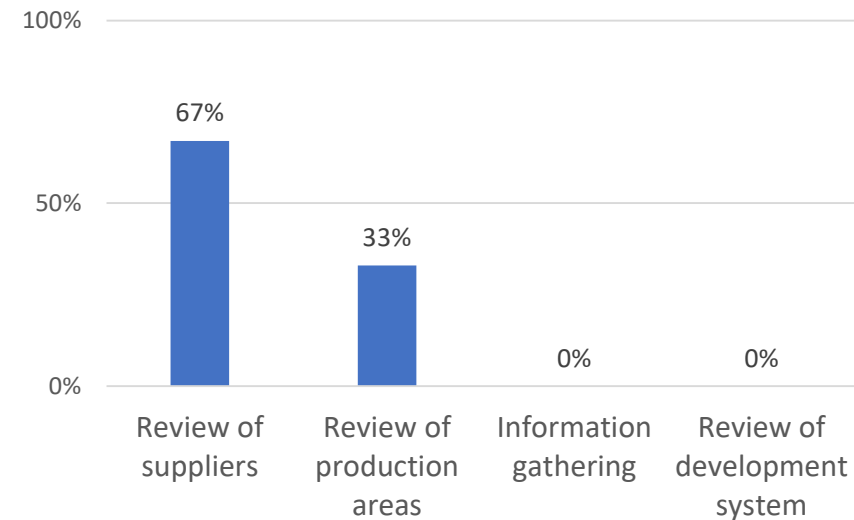
### < Increased costs due to tariffs >



### < Delayed product development in China >



### < Delayed product development in the U.S. >



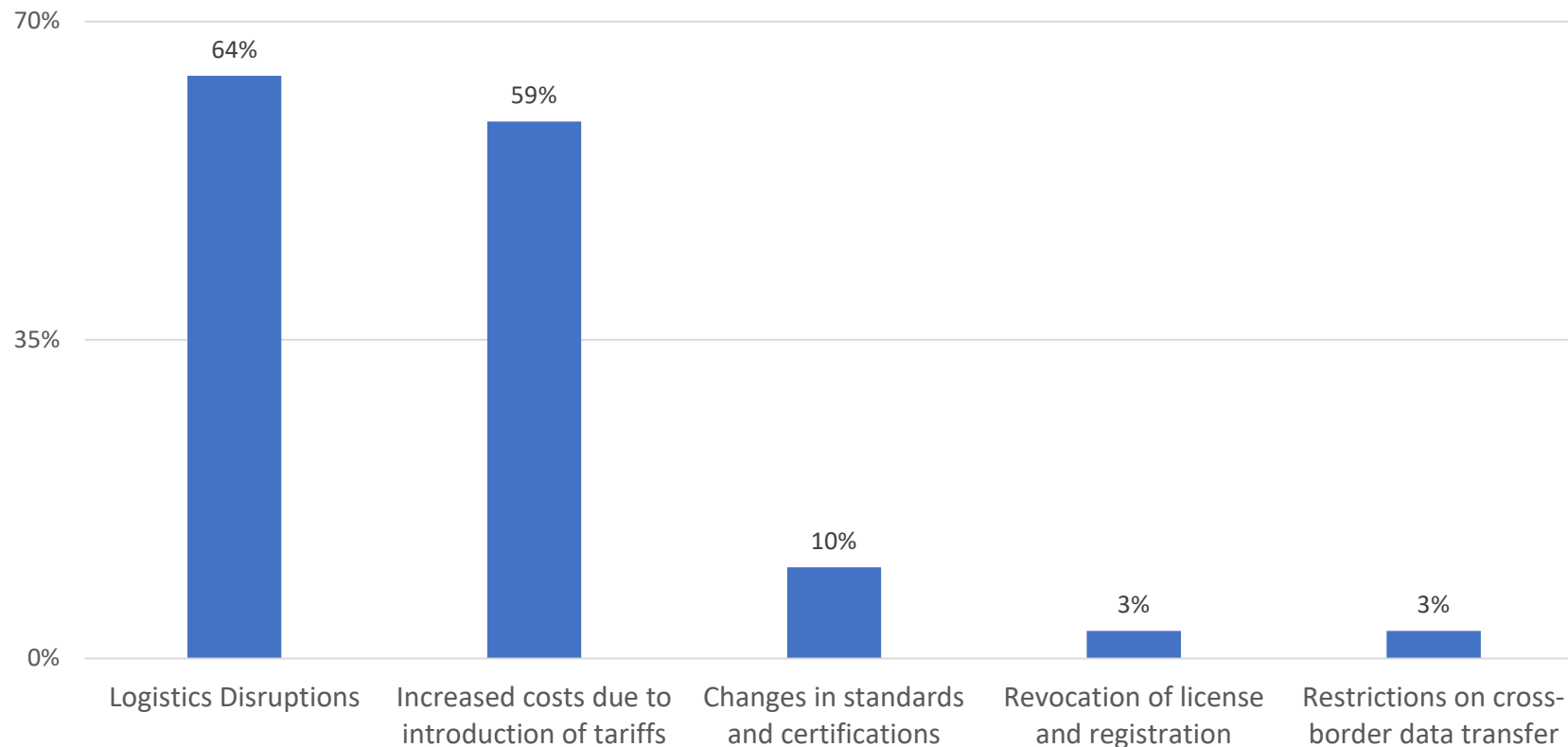
## 6 Survey of Topics for this Year ③

### ③ Responding to Trade Trends in Each Country: Brexit

Number of companies surveyed : 271 ( Member companies with overseas subsidiaries)

Number of companies answered : 59 (22%)

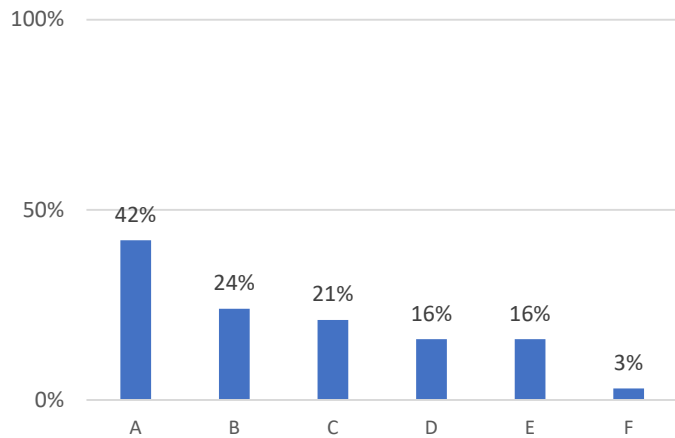
#### Issues of concern



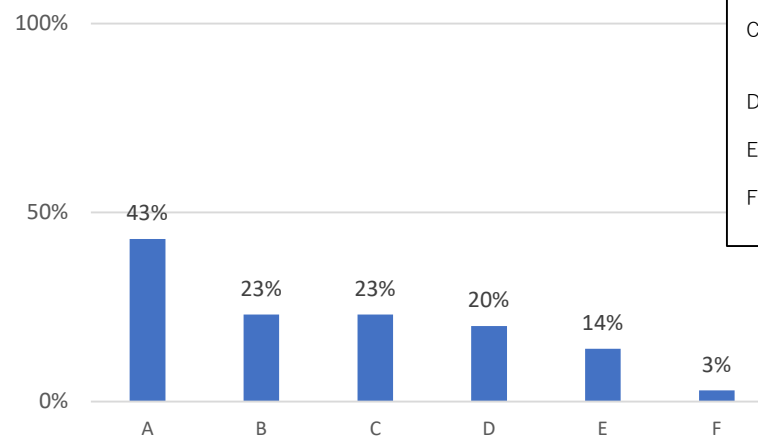
# 6. Survey of Topics for this Year ③

## Correspondence status

<Logistics Disruptions >

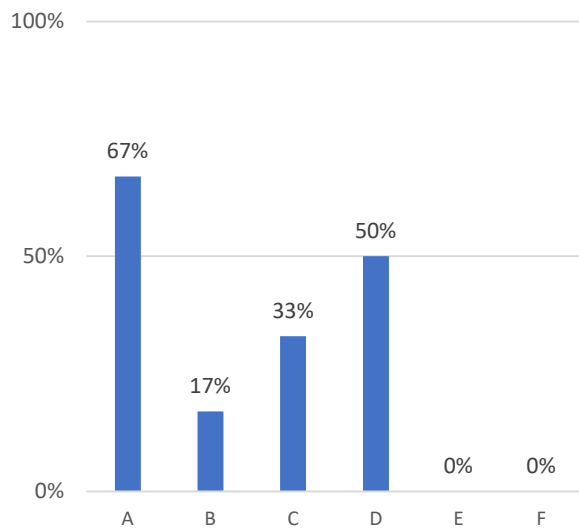


<Increased costs due to introduction of tariffs >

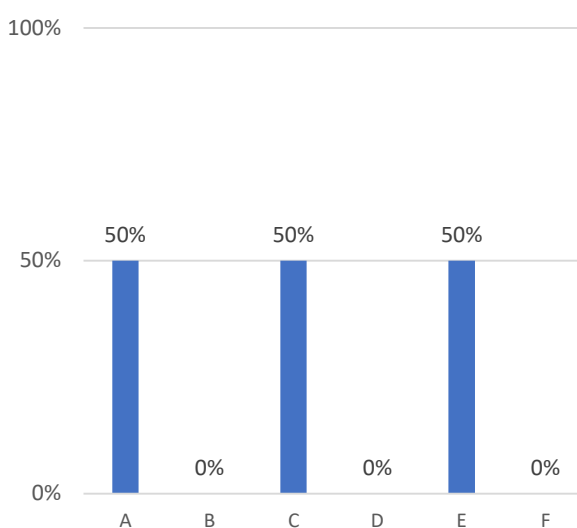


- A. Inventory buildup
- B. Production adjustment
- C. Reorganization of functions within the Group
- D. Changes in the supply chain
- E. Transfer to product prices
- F. Establishment of new locations

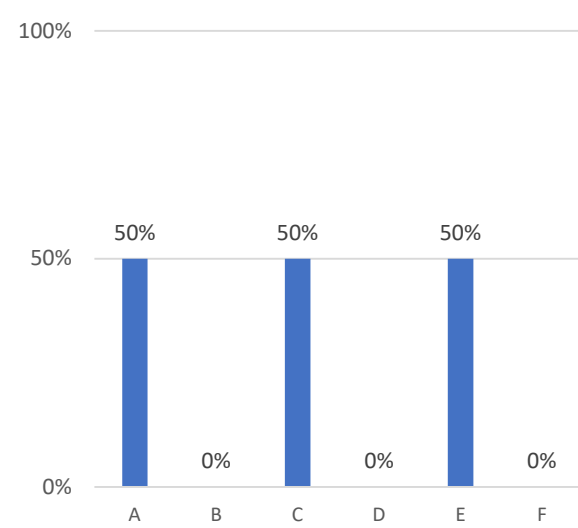
<Changes in standards and certifications >



<Revocation of license and registration >



<Restrictions on cross-border data transfer >



## 7. Overall summary

### 1. Summary of this year's survey

**Member companies of JAPIA that have overseas subsidiaries are eligible. ( Response rate : 79% )。**

**The number of overseas subsidiaries in 2019 is +6 compared to the previous year.**

### 2. Overseas Expansion and Employment

**Member companies are expanding overseas in step with the overseas expansion of Japanese automobile manufacturers.**

**The number of employment surpassed 1 million in 2017 and reached 1.48 million in 2019.**

### 3. Overseas Sales

**Overseas sales have continued to grow since Financial Crisis and Great East Japan Earthquake, and is more than tripled from 2009 to 19 trillion yen in 2019.**

### 4. Profit by Region

**In terms of profits, the ratio of profitable subsidiaries is declining year on year in all regions except Europe.**

**The " feeling" of profitability also worsened more than improved in all regions this year.**

### 5. Local procurement rate by region

**The local procurement rate remains at 70% overall, but is declining in all regions.**

### 6. Survey of Topics for this Year

**(1) COVID-19: The targets of the review of the global production system include ASEAN, China, and North America.**

**Review items include centralized production, inventory standards, and centralized purchasing.**

**(2) US-China trade conflict : Concerns include the impact on the auto market and increased costs due to tariffs.**

**Review of suppliers and production sites is the status of response.**

**(3) Brexit: Concerns include logistics disruptions and increased costs due to the introduction of tariffs. Inventory buildup, production adjustments, and reorganization of group functions are the current responses.**

**We would like to express our deepest gratitude to all of our member companies who cooperated in this survey.**

**We hope that this survey will be used as a reference for our future business activities and will help to further develop the automotive parts industry and facilitate the smooth business activities of our member companies.**



# Supplementary material (data)

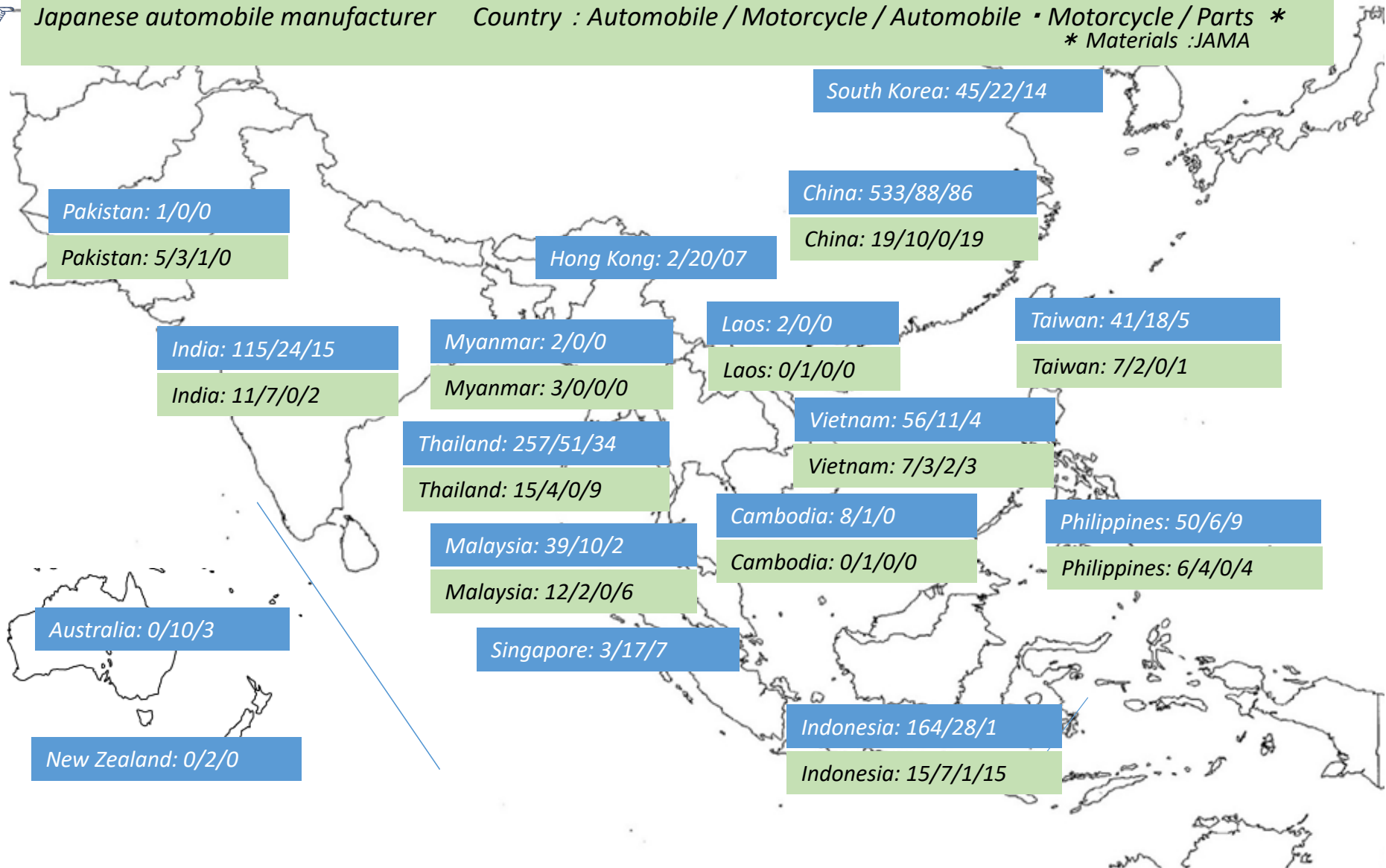
< Overseas expansion of member companies >

< Global sales of automobiles >

# < Overseas expansion of member companies - Asia >

👉 *Automobile parts* Country : Number of production function subsidiaries / Number of sales function subsidiaries / Others ( Management and supervision, design and development, marketing, etc. )

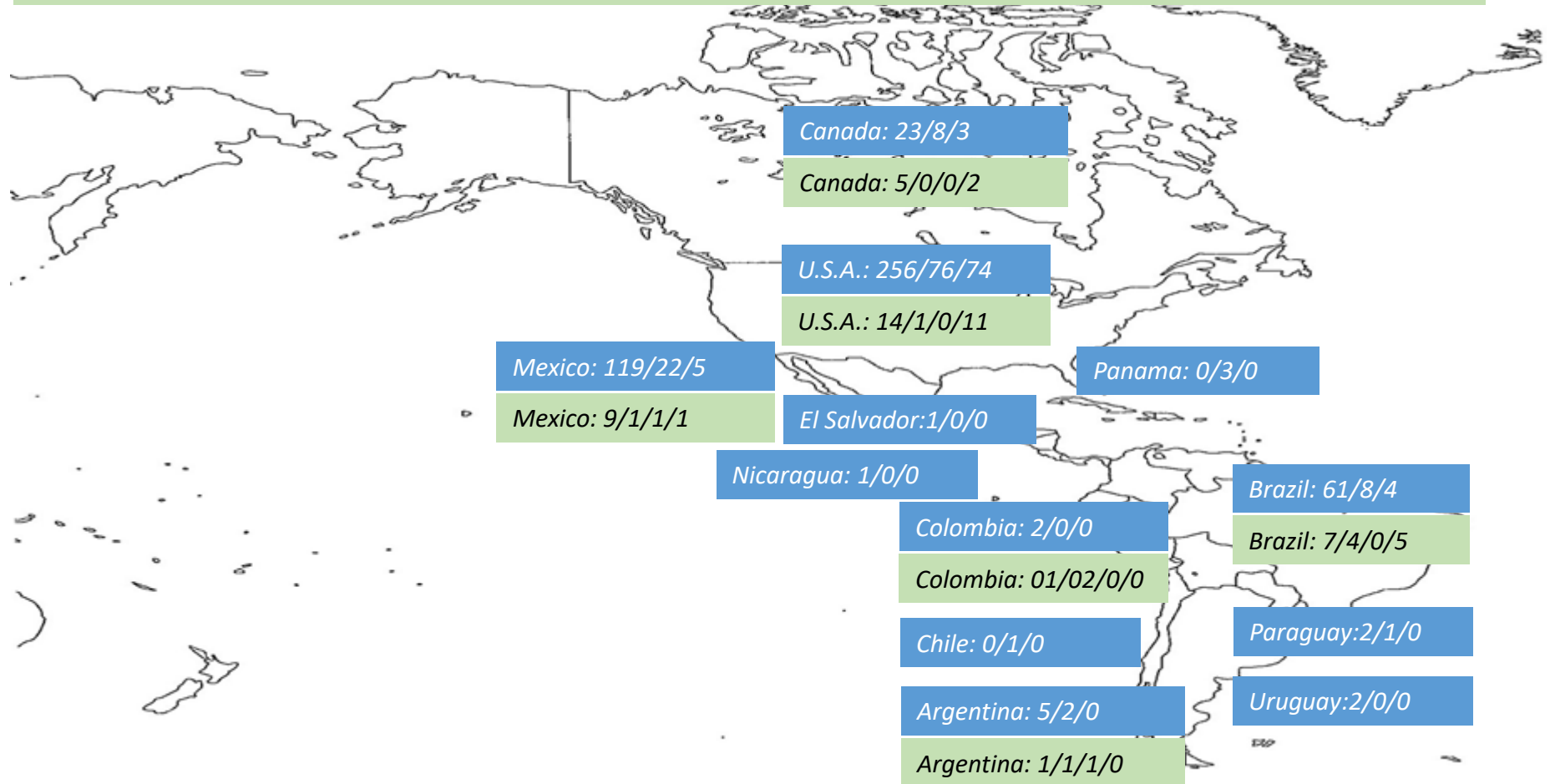
👉 *Japanese automobile manufacturer* Country : Automobile / Motorcycle / Automobile ▪ Motorcycle / Parts \*  
\* Materials : JAMA



## < Overseas expansion of member companies - North Central South America >

☞ *Automobile parts* Country : Number of production function subsidiaries / Number of sales function subsidiaries / Others ( Management and supervision, design and development, marketing, etc. )

☞ *Japanese automobile manufacturer* Country : Automobile / Motorcycle / Automobile \* Motorcycle / Parts \*  
\* Materials :JAMA



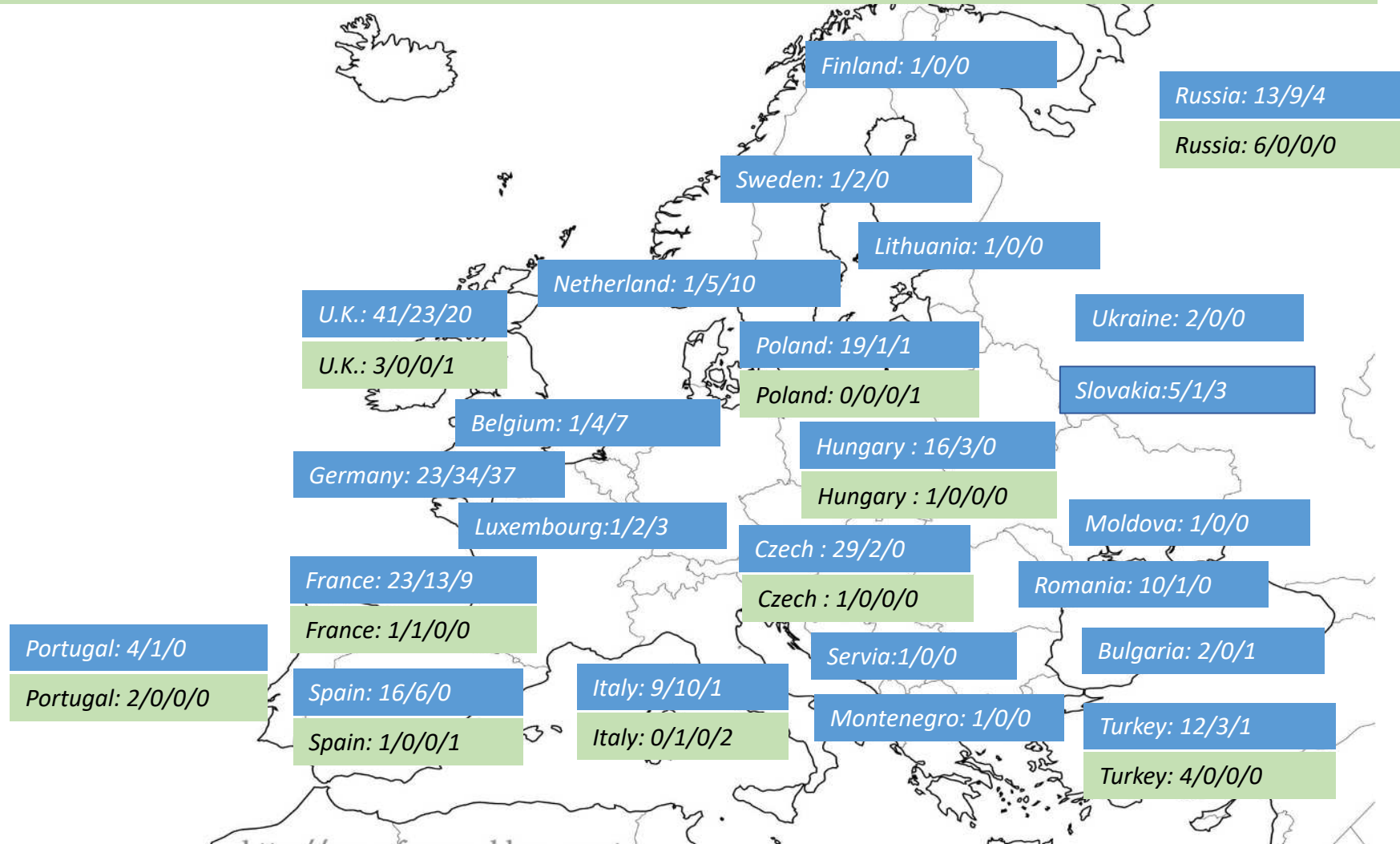
# < Overseas expansion of member companies - Europe >



Automobile parts Country : Number of production function subsidiaries / Number of sales function subsidiaries / Others ( Management and supervision, design and development, marketing, etc. )

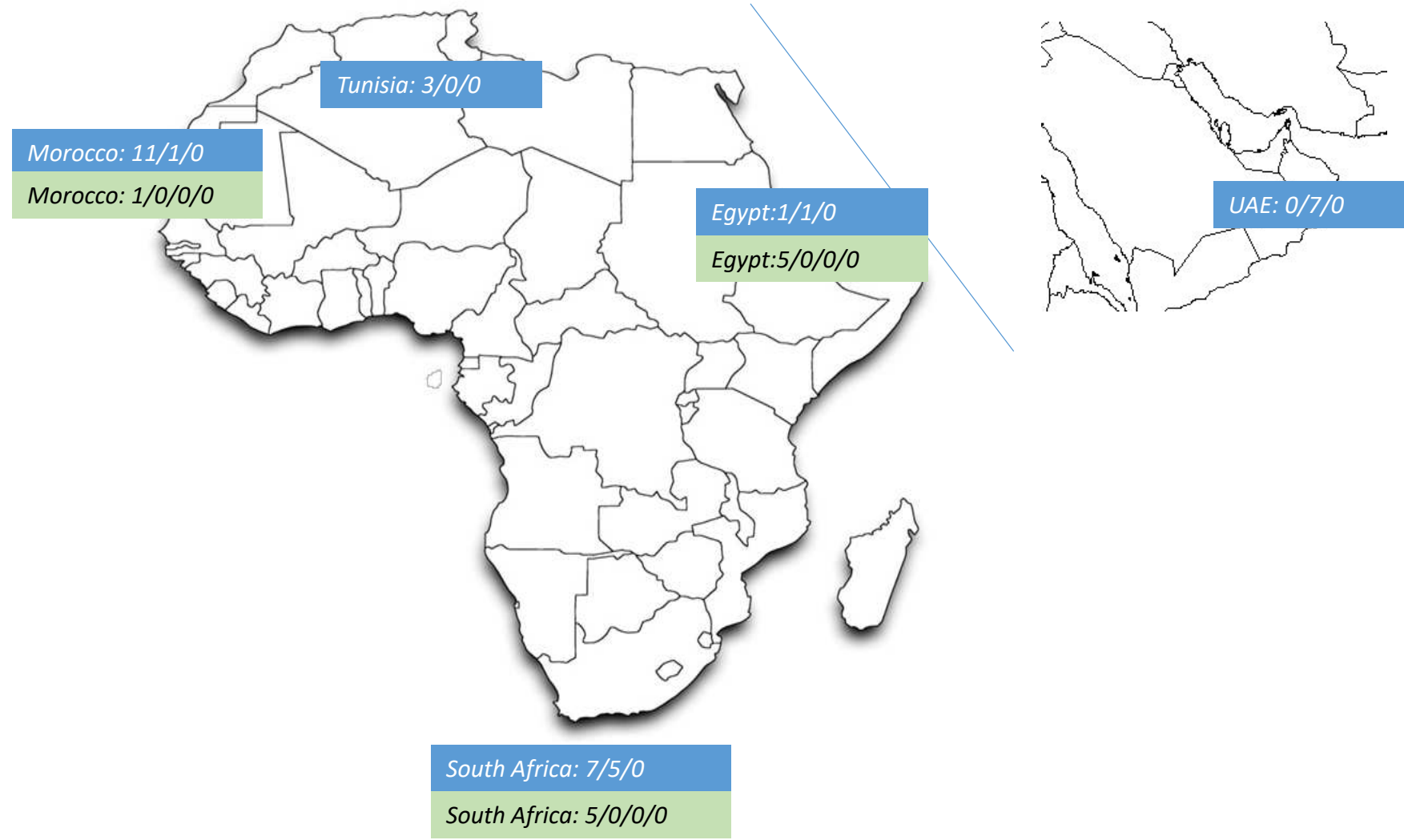


Japanese automobile manufacturer Country : Automobile / Motorcycle / Automobile • Motorcycle / Parts \*  
\* Materials :JAMA



# < Overseas expansion of member companies - Africa >

☞ *Automobile parts* Country : Number of production function subsidiaries / Number of sales function subsidiaries / Others ( Management and supervision, design and development, marketing, etc. )  
☞ *Japanese automobile manufacturer* Country : Automobile / Motorcycle / Automobile • Motorcycle / Parts \*  
\* Materials :JAMA



# < Supplementary material Global sales of automobiles (Data: MarkLines) >



【Whole World】

Unit:thousand

|      |                         | April        | May          | June         | July         | August       | September    | October      | November     | December     | January      | February     | March        | Total         |
|------|-------------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|
| 2019 | Light Vehicle           | 6,886        | 7,271        | 7,380        | 6,810        | 6,850        | 7,229        | 7,140        | 7,376        | 7,756        | 6,211        | 4,852        | 5,230        | 80,991        |
|      | Buses/Trucks            | 219          | 230          | 238          | 212          | 202          | 202          | 207          | 215          | 217          | 200          | 158          | 210          | 2,511         |
|      | <b>Total</b>            | <b>7,105</b> | <b>7,501</b> | <b>7,618</b> | <b>7,022</b> | <b>7,052</b> | <b>7,430</b> | <b>7,347</b> | <b>7,591</b> | <b>7,974</b> | <b>6,412</b> | <b>5,010</b> | <b>5,440</b> | <b>83,502</b> |
|      | Year-on-year comparison | 94%          | 94%          | 93%          | 98%          | 97%          | 98%          | 97%          | 98%          | 101%         | 90%          | 80%          | 61%          | 91%           |
| 2018 | Light Vehicle           | 7,386        | 7,784        | 7,940        | 7,004        | 7,111        | 7,388        | 7,324        | 7,511        | 7,687        | 6,929        | 6,098        | 8,600        | 88,763        |
|      | Buses/Trucks            | 201          | 208          | 219          | 193          | 195          | 204          | 219          | 224          | 213          | 193          | 181          | 259          | 2,508         |
|      | <b>Total</b>            | <b>7,588</b> | <b>7,992</b> | <b>8,158</b> | <b>7,197</b> | <b>7,306</b> | <b>7,592</b> | <b>7,544</b> | <b>7,735</b> | <b>7,900</b> | <b>7,122</b> | <b>6,279</b> | <b>8,859</b> | <b>91,271</b> |

【By Region】

Unit:Thousand

North America

|      |                         | April        | May          | June         | July         | August       | September    | October      | November     | December     | January      | February     | March        | Total         |
|------|-------------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|
| 2019 | Light Vehicle           | 1,635        | 1,919        | 1,827        | 1,700        | 1,966        | 1,562        | 1,636        | 1,700        | 1,800        | 1,380        | 1,620        | 1,194        | 19,938        |
|      | Buses/Trucks            | 13           | 14           | 18           | 18           | 20           | 19           | 10           | 13           | 14           | 11           | 15           | 24           | 187           |
|      | <b>Total</b>            | <b>1,662</b> | <b>1,947</b> | <b>1,854</b> | <b>1,728</b> | <b>1,992</b> | <b>1,593</b> | <b>1,661</b> | <b>1,721</b> | <b>1,826</b> | <b>1,397</b> | <b>1,637</b> | <b>1,212</b> | <b>20,230</b> |
|      | Year-on-year comparison | 97%          | 99%          | 96%          | 101%         | 108%         | 89%          | 98%          | 100%         | 94%          | 100%         | 107%         | 62%          | 96%           |
| 2018 | Light Vehicle           | 1,678        | 1,947        | 1,896        | 1,689        | 1,816        | 1,757        | 1,661        | 1,692        | 1,920        | 1,373        | 1,509        | 1,932        | 20,870        |
|      | Buses/Trucks            | 22           | 23           | 25           | 24           | 27           | 27           | 28           | 24           | 29           | 22           | 22           | 26           | 298           |
|      | <b>Total</b>            | <b>1,700</b> | <b>1,970</b> | <b>1,920</b> | <b>1,713</b> | <b>1,843</b> | <b>1,784</b> | <b>1,689</b> | <b>1,716</b> | <b>1,949</b> | <b>1,395</b> | <b>1,531</b> | <b>1,958</b> | <b>21,168</b> |

Europe

|      |                         | April        | May          | June         | July         | August       | September    | October      | November     | December     | January      | February     | March        | Total         |
|------|-------------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|
| 2019 | Light Vehicle           | 1,668        | 1,758        | 1,829        | 1,629        | 1,357        | 1,603        | 1,545        | 1,544        | 1,612        | 1,381        | 1,337        | 1,138        | 18,401        |
|      | Buses/Trucks            | 41           | 47           | 48           | 39           | 41           | 32           | 39           | 40           | 35           | 34           | 33           | 31           | 462           |
|      | <b>Total</b>            | <b>1,710</b> | <b>1,805</b> | <b>1,878</b> | <b>1,668</b> | <b>1,399</b> | <b>1,636</b> | <b>1,584</b> | <b>1,583</b> | <b>1,648</b> | <b>1,415</b> | <b>1,370</b> | <b>1,169</b> | <b>18,863</b> |
|      | Year-on-year comparison | 101%         | 101%         | 93%          | 102%         | 96%          | 109%         | 105%         | 102%         | 115%         | 94%          | 94%          | 53%          | 96%           |
| 2018 | Light Vehicle           | 1,657        | 1,756        | 1,967        | 1,595        | 1,424        | 1,462        | 1,459        | 1,502        | 1,392        | 1,468        | 1,419        | 2,147        | 19,248        |
|      | Buses/Trucks            | 39           | 39           | 43           | 37           | 39           | 38           | 46           | 44           | 37           | 36           | 35           | 43           | 475           |
|      | <b>Total</b>            | <b>1,696</b> | <b>1,795</b> | <b>2,009</b> | <b>1,633</b> | <b>1,463</b> | <b>1,500</b> | <b>1,505</b> | <b>1,546</b> | <b>1,429</b> | <b>1,504</b> | <b>1,454</b> | <b>2,191</b> | <b>19,723</b> |

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|      |                         | April      | May        | June       | July       | August     | September  | October    | November   | December   | January    | February   | March      | Total        |
|------|-------------------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|--------------|
| 2019 | Light Vehicle           | 258        | 288        | 241        | 276        | 270        | 267        | 280        | 263        | 240        | 248        | 242        | 209        | 3,083        |
|      | Buses/Trucks            | 15         | 15         | 14         | 15         | 14         | 15         | 16         | 17         | 17         | 13         | 14         | 12         | 175          |
|      | <b>Total</b>            | <b>273</b> | <b>303</b> | <b>255</b> | <b>291</b> | <b>284</b> | <b>282</b> | <b>296</b> | <b>280</b> | <b>257</b> | <b>261</b> | <b>256</b> | <b>221</b> | <b>3,258</b> |
|      | Year-on-year comparison | 99%        | 103%       | 93%        | 95%        | 92%        | 107%       | 98%        | 95%        | 96%        | 85%        | 100%       | 70%        | 94%          |
| 2018 | Light Vehicle           | 258        | 276        | 257        | 290        | 292        | 247        | 286        | 278        | 252        | 294        | 247        | 298        | 3,276        |
|      | Buses/Trucks            | 16         | 18         | 19         | 17         | 17         | 16         | 17         | 16         | 15         | 12         | 10         | 17         | 190          |
|      | <b>Total</b>            | <b>274</b> | <b>294</b> | <b>276</b> | <b>306</b> | <b>310</b> | <b>263</b> | <b>303</b> | <b>295</b> | <b>268</b> | <b>306</b> | <b>257</b> | <b>315</b> | <b>3,466</b> |

# < Supplementary material Global sales of automobiles (Data: MarkLines) >



| China |                         | April        | May          | June         | July         | August       | September    | October      | November     | December     | January      | February     | March        | Total         |
|-------|-------------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|
| 2019  | Light Vehicle           | 1,921        | 1,853        | 1,993        | 1,765        | 1,919        | 2,228        | 2,234        | 2,396        | 2,598        | 1,860        | 286          | 1,361        | 22,414        |
|       | Buses/Trucks            | 60           | 59           | 64           | 43           | 39           | 43           | 50           | 61           | 60           | 67           | 24           | 69           | 639           |
|       | <b>Total</b>            | <b>1,980</b> | <b>1,913</b> | <b>2,056</b> | <b>1,808</b> | <b>1,958</b> | <b>2,271</b> | <b>2,284</b> | <b>2,457</b> | <b>2,658</b> | <b>1,927</b> | <b>310</b>   | <b>1,430</b> | <b>23,053</b> |
|       | Year-on-year comparison | 85%          | 84%          | 90%          | 96%          | 93%          | 95%          | 96%          | 96%          | 100%         | 81%          | 21%          | 57%          | 85%           |
| 2018  | Light Vehicle           | 2,267        | 2,239        | 2,226        | 1,855        | 2,067        | 2,353        | 2,336        | 2,492        | 2,613        | 2,319        | 1,445        | 2,446        | 26,657        |
|       | Buses/Trucks            | 16           | 18           | 19           | 17           | 17           | 16           | 17           | 16           | 15           | 12           | 10           | 17           | 190           |
|       | <b>Total</b>            | <b>2,319</b> | <b>2,288</b> | <b>2,274</b> | <b>1,889</b> | <b>2,103</b> | <b>2,394</b> | <b>2,380</b> | <b>2,548</b> | <b>2,661</b> | <b>2,367</b> | <b>1,482</b> | <b>2,520</b> | <b>27,225</b> |

| India |                         | April      | May        | June       | July       | August     | September  | October    | November   | December   | January    | February   | March      | Total        |
|-------|-------------------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|--------------|
| 2019  | Light Vehicle           | 313        | 305        | 293        | 255        | 246        | 280        | 349        | 322        | 297        | 333        | 306        | 152        | 3,450        |
|       | Buses/Trucks            | 3          | 4          | 4          | 3          | 3          | 2          | 3          | 3          | 5          | 5          | 4          | 2          | 40           |
|       | <b>Total</b>            | <b>316</b> | <b>308</b> | <b>297</b> | <b>258</b> | <b>248</b> | <b>282</b> | <b>352</b> | <b>326</b> | <b>302</b> | <b>338</b> | <b>310</b> | <b>154</b> | <b>3,491</b> |
|       | Year-on-year comparison | 85%        | 82%        | 84%        | 70%        | 67%        | 73%        | 95%        | 96%        | 96%        | 92%        | 86%        | 38%        | 80%          |
| 2018  | Light Vehicle           | 369        | 374        | 350        | 364        | 369        | 386        | 369        | 337        | 312        | 364        | 356        | 395        | 4,345        |
|       | Buses/Trucks            | 3          | 4          | 4          | 3          | 3          | 3          | 2          | 2          | 3          | 3          | 3          | 5          | 39           |
|       | <b>Total</b>            | <b>371</b> | <b>378</b> | <b>354</b> | <b>367</b> | <b>372</b> | <b>389</b> | <b>371</b> | <b>339</b> | <b>315</b> | <b>368</b> | <b>360</b> | <b>401</b> | <b>4,385</b> |

| South America |                         | April      | May        | June       | July       | August     | September  | October    | November   | December   | January    | February   | March      | Total        |
|---------------|-------------------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|--------------|
| 2019          | Light Vehicle           | 311        | 321        | 299        | 334        | 329        | 319        | 325        | 305        | 360        | 277        | 264        | 206        | 3,650        |
|               | Buses/Trucks            | 13         | 14         | 12         | 14         | 15         | 14         | 15         | 14         | 14         | 12         | 10         | 9          | 157          |
|               | <b>Total</b>            | <b>324</b> | <b>335</b> | <b>311</b> | <b>348</b> | <b>344</b> | <b>333</b> | <b>340</b> | <b>318</b> | <b>374</b> | <b>289</b> | <b>274</b> | <b>216</b> | <b>3,806</b> |
|               | Year-on-year comparison | 92%        | 97%        | 97%        | 103%       | 91%        | 102%       | 93%        | 97%        | 103%       | 91%        | 95%        | 71%        | 94%          |
| 2018          | Light Vehicle           | 343        | 334        | 311        | 326        | 366        | 315        | 354        | 317        | 345        | 304        | 278        | 290        | 3,883        |
|               | Buses/Trucks            | 11         | 11         | 10         | 12         | 12         | 11         | 13         | 12         | 16         | 13         | 12         | 12         | 145          |
|               | <b>Total</b>            | <b>354</b> | <b>345</b> | <b>322</b> | <b>338</b> | <b>378</b> | <b>326</b> | <b>367</b> | <b>329</b> | <b>362</b> | <b>316</b> | <b>289</b> | <b>302</b> | <b>4,029</b> |

| Others (including Japan) |                         | April      | May        | June         | July       | August     | September    | October    | November   | December   | January    | February   | March        | Total         |
|--------------------------|-------------------------|------------|------------|--------------|------------|------------|--------------|------------|------------|------------|------------|------------|--------------|---------------|
| 2019                     | Light Vehicle           | 780        | 827        | 898          | 850        | 763        | 971          | 772        | 847        | 848        | 732        | 796        | 969          | 10,054        |
|                          | Buses/Trucks            | 60         | 64         | 70           | 70         | 64         | 64           | 59         | 59         | 60         | 52         | 57         | 69           | 747           |
|                          | <b>Total</b>            | <b>840</b> | <b>891</b> | <b>967</b>   | <b>921</b> | <b>827</b> | <b>1,034</b> | <b>830</b> | <b>906</b> | <b>909</b> | <b>784</b> | <b>853</b> | <b>1,038</b> | <b>10,801</b> |
|                          | Year-on-year comparison | 96%        | 97%        | 96%          | 97%        | 99%        | 110%         | 89%        | 94%        | 99%        | 91%        | 94%        | 88%          | 96%           |
| 2018                     | Light Vehicle           | 814        | 857        | 933          | 885        | 776        | 868          | 860        | 893        | 853        | 807        | 845        | 1,092        | 10,482        |
|                          | Buses/Trucks            | 59         | 66         | 70           | 65         | 61         | 68           | 69         | 69         | 63         | 59         | 62         | 81           | 793           |
|                          | <b>Total</b>            | <b>874</b> | <b>923</b> | <b>1,003</b> | <b>950</b> | <b>837</b> | <b>936</b>   | <b>928</b> | <b>962</b> | <b>917</b> | <b>866</b> | <b>907</b> | <b>1,173</b> | <b>11,276</b> |

| Japan out of others |                         | April      | May        | June       | July       | August     | September  | October    | November   | December   | January    | February   | March      | Total        |
|---------------------|-------------------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|--------------|
| 2019                | Light Vehicle           | 366        | 382        | 432        | 441        | 369        | 529        | 305        | 372        | 330        | 349        | 415        | 557        | 4,847        |
|                     | Buses/Trucks            | 13         | 14         | 18         | 18         | 20         | 19         | 10         | 13         | 14         | 11         | 15         | 24         | 187          |
|                     | <b>Total</b>            | <b>378</b> | <b>396</b> | <b>450</b> | <b>459</b> | <b>388</b> | <b>548</b> | <b>315</b> | <b>386</b> | <b>344</b> | <b>360</b> | <b>430</b> | <b>581</b> | <b>5,035</b> |
|                     | Year-on-year comparison | 104%       | 107%       | 99%        | 104%       | 107%       | 113%       | 75%        | 87%        | 89%        | 88%        | 90%        | 91%        | 96%          |
| 2018                | Light Vehicle           | 354        | 358        | 437        | 426        | 349        | 465        | 405        | 425        | 371        | 395        | 463        | 614        | 5,064        |
|                     | Buses/Trucks            | 12         | 13         | 16         | 15         | 14         | 20         | 14         | 16         | 16         | 12         | 16         | 26         | 189          |
|                     | <b>Total</b>            | <b>366</b> | <b>371</b> | <b>453</b> | <b>441</b> | <b>363</b> | <b>485</b> | <b>419</b> | <b>442</b> | <b>387</b> | <b>408</b> | <b>479</b> | <b>640</b> | <b>5,253</b> |