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NEWSLETTER OF THE JAPAN AUTOMOBILE MANUFACTURERS ASSOCIATION OF CANADA

Toyota to build \$800 million auto plant in Woodstock, Ontario

On June 30 with considerable fanfare, Toyota confirmed their decision to build their second Canadian vehicle manufacturing plant in Woodstock Ontario, about 50 kilometers southwest of the Toyota Motor Manufacturing Canada (TMMC) plant in Cambridge. The \$800 million facility will employ 1,300 team members and will initially produce the RAV4, a popular compact sport utility vehicle, for the North American market. It is the first green field assembly plant in Canada in almost 20 years. The new plant is expected to start production in 2008 with the capacity to build 100,000 vehicles a year.

"This location allows us to capitalize on our outstanding operation in Cambridge. Its proximity to suppliers on both sides of the (Canada – US) border will benefit both countries and it will mean new opportunities for those suppliers", said Atsushi Niimi, the recent former president of Toyota Motor Manufacturing North America (TMMNA), and now senior managing director of Toyota Motor Corporation.

The plant will be managed by TMMC, which, under the leadership of President Ray Tanguay, currently builds the Toyota Corolla and Matrix in the North Plant and the Lexus RX330 in the South Plant. The new plant will bring Toyota's manufacturing employment in Ontario to about 5,600 when the Woodstock plant begins operations.

"Today's announcement is truly a milestone", said Mr. Tanguay. "It is recognition of almost 17 years of manufacturing success in Cambridge and opens the page to a whole new chapter for Toyota in Canada."

TMMC has been manufacturing vehicles in Cambridge since November 1988. Capacity has risen steadily over the years, from 50,000 units in the beginning to 288,000 vehicles in 2004.

Toyota's new plant in Woodstock will receive \$125 million in government support - \$70 million from Ontario and \$55 million from the federal government. Attending the ceremony in Woodstock, the Honourable David Emerson, Minister of Industry in Ottawa, said, "Greenfield investments are rare and new auto assembly investments are coveted worldwide for the significant economic and technological benefits they generate. This new Toyota plant will bring employment and training opportunities, new infrastructure, advances in environmental technology research and development, and spin-off benefits to related industries." The repayable federal funds will be used to support pre-production and environmental technologies in the plant and paint shop.

Ontario Premier Dalton McGuinty, who also joined the announcement, said, "Toyota's choice sends a message to the world: Ontario



Ontario Minister of Economic Development & Trade, Joe Cordiano with Ray Tanguay, President, Toyota Motor Manufacturing Canada and the Toyota RAV-4 sport utility vehicle that will be built at the new plant in Woodstock starting in 2008.

is the place to be. It's the place to be for investors who want to access the world's most productive workforce. And it's the place to be for investors looking for stable, predictable business costs, free from spiraling health costs plaguing many parts of the world."

The Ontario Government has pledged to invest up to \$70 million in support of the new plant, including support for training and infrastructure. Ontario Minister of Economic Development & Trade, Joe Cordiano, who played a key role in attracting this project into the province said, "Locating this new plant here is a strong vote of confidence in our province. Toyota recognizes the value of our skilled and talented workforce, and we welcome Toyota."

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Celebrating the new Toyota plant in Woodstock – (l to r) Atsushi Niimi, Senior Managing Director, Toyota Motor Corporation; Kahlil Ramal, MPP, London – Fanshawe; Ray Tanguay, President, TMMC; Hon. Dalton McGuinty, Premier of Ontario; Hon. Joe Cordiano, Minister, EDT; Hon. David Emerson, Minister, Industry Canada; H.E. Ambassador of Japan Sadaaki Numata; Hon. Jerry Pickard, P.S. to the Minister of Industry; Seiichi Sudo, President, TMMNA; Michael Harding, Mayor of Woodstock; Donald Woolcott, Warden, Oxford County.

CAPTIN (Toyota’s aluminum wheel plant in British Columbia) plans sixth expansion

Canadian Auto Parts Toyota, Inc. (CAPTIN), a Toyota affiliate that makes aluminum wheels in Delta, British Columbia, also announced on June 30 a plant expansion that will add more than 30 new jobs and an additional investment of \$39 million. As a result of this expansion of the CAPTIN facility, the sixth since their start-up in 1985, wheel capacity will increase by almost 17 percent to 1.68 million units per year, beginning in July 2007. Cumulative investment at CAPTIN will reach \$232.2 million, and employ more than 260 team members when fully operational.

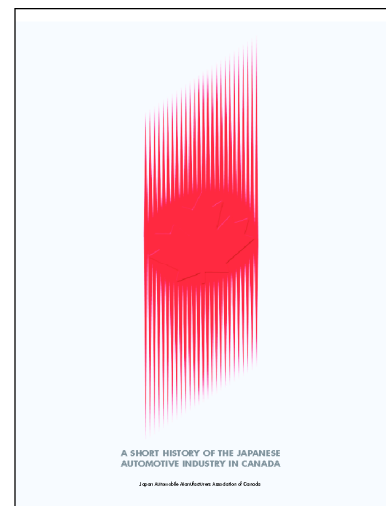
“The expansion of CAPTIN’s presence in B.C. is a vote of confidence in its employees and in B.C.’s strong economy,” said Gordon Campbell, Premier of British Columbia. “For 20 years, CAPTIN has made a significant contribution to our province and we look forward to their continued success here as we build B.C.’s strong ties with the Asia-Pacific to attract similar investment across the province.”

The President of CAPTIN, Gary Smallenberg added in response, “Everyday, we are reminded of how our contributions benefit Toyota’s overall growth strategy, none of which would be possible without the hard work and dedication of CAPTIN’s outstanding team members.”

New JAMA Canada history publication - “A Short History of the Japanese Auto Industry in Canada”

To commemorate our 20th anniversary of operation, JAMA Canada will publish a new book entitled, *A Short History of the Japanese Auto Industry in Canada*. This 60 page work will focus on the highlights of

the development of the industry since Japanese automakers first came to Canada in the mid-1960’s to begin selling Japanese made vehicles to Canadian consumers. Along with an analysis of a number of key automotive trade issues over the past 40 years, there is a collection of personal observations by several key people from both Canada and Japan who were actively involved, particularly during the past two decades when both Pacific Automotive Co-operation (PAC) and JAMA Canada were trying to deepen bilateral trade relationships as well as assist automakers, partsmakers, trade associations and governments in both countries. There is also a section on the history and impact of the Canadian Association of Japanese Auto Dealers (CAJAD), as well as a commentary by Dennis DesRosiers. While a limited number of print copies will be available, there will be a downloadable version available in both English and French on our website in the near future at www.jama.ca.



Sales in Canada rebound in 2Q while production remains strong

Sales

In the second quarter of 2005, overall vehicle sales in Canada gained some momentum from the rather sluggish start in the first quarter. Both April and June made solid gains, driven in large part by the increasing use of incentives. At the end of June, total Canadian light vehicle sales were up 2.2% over 2004 to 808,510 units. Passenger cars were ahead by 1.6%, while light truck sales led with a 3.0% gain over the same period last year.

For Japanese automakers, light vehicle sales turned around in the second quarter after sliding in the first three months of this year. At the end of June, year to date sales were up 2.2% to 253,365 units for a 31.3% market share in the first half, unchanged from last year. While passenger car sales were flat, sales of light trucks rose 7.7% to 67,574 units. Also of note, sales of Japanese brand light vehicles built in North America were up 6.1%, while sales of models imported from Japan were down 3.7%, indicating an increasing reliance on local sourcing as a result of expanding production capacity in North America.

Among individual companies, Nissan Canada was the growth leader with a sales gain of 7.4%, followed by Honda Canada, up 5.4% and Toyota Canada, up 2.8%. Subaru Canada sales increased marginally 0.5%, while Mazda Canada, Suzuki Canada

and Mitsubishi Canada were all in negative territory for the year to date. Of particular note, Mazda Canada sales soared in April and June (up 11.5% and 24.1% respectively) which erased most of their earlier losses in 2005.

As a group, Big Three sales in Canada (GM, Ford & Chrysler brands) were up 1.1% in the first six months to 464,459 units, a 57.4% market share, down from 58.0% in 2004. Korean automakers (Hyundai & Kia) saw sales jump 13.5% in the first two quarters to 46,395 units, which raised their market share to 5.7% from 5.2%. European automakers sales increased 3.4% to 44,291 units, which drove their market share up to 5.5%.

In the medium & heavy duty truck segment, sales of Class 4-8 trucks in Canada were running 20.1% ahead of last year. For the two Japanese affiliated truck manufacturers, Hino and Mitsubishi Fuso, sales through the second quarter of 2005 were up 15.3% to 806 units from 699 in the same period in 2004. While Hino Motors Sales Canada results were down 2.4% to 610 units in the first six months, Mitsubishi Fuso sales jumped 164.9% to a record 196 units.

Production & Export

Production of light vehicles at Japanese affiliated plants in Canada grew steadily during the second quarter, although more moderately than in the first three months. At the end of June, combined output for the first half of 2005 at Honda (HCM), Toyota (TMMC) and CAMI

See Sales in Rebound... continued on page 4

Light Vehicle Sales in Canada, by Company

| Company | Jan-June 2005 | | | Jan-June 2004 | | | % Change | | |
|--------------------|---------------|--------|---------|---------------|--------|---------|----------|--------|--------|
| | CARS | TRUCKS | TOTAL | CARS | TRUCKS | TOTAL | CARS | TRUCKS | TOTAL |
| HONDA | 50,244 | 21,160 | 71,404 | 50,326 | 17,408 | 67,734 | -0.2 | 21.6 | 5.4 |
| N.A. Built | 46,035 | 13,458 | 59,493 | 45,904 | 10,166 | 56,070 | 0.3 | 32.4 | 6.1 |
| Japan Built | 4,209 | 7,702 | 11,911 | 4,422 | 7,242 | 11,664 | -4.8 | 6.4 | 2.1 |
| TOYOTA | 67,172 | 21,010 | 88,182 | 63,510 | 22,238 | 85,748 | 5.8 | -5.5 | 2.8 |
| N.A. Built | 46,974 | 13,078 | 60,052 | 43,594 | 13,538 | 57,132 | 7.8 | -3.4 | 5.1 |
| Japan Built | 20,198 | 7,932 | 28,130 | 19,916 | 8,700 | 28,616 | 1.4 | -8.8 | -1.7 |
| MAZDA | 35,690 | 4,884 | 40,574 | 35,164 | 6,003 | 41,167 | 1.5 | -18.6 | -1.4 |
| N.A. Built | 6,429 | 3,638 | 10,067 | 4,267 | 3,746 | 8,013 | 50.7 | -2.9 | 25.6 |
| Japan Built | 29,261 | 1,246 | 30,507 | 30,897 | 2,257 | 33,154 | -5.3 | -44.8 | -8.0 |
| NISSAN | 21,069 | 15,245 | 36,314 | 22,254 | 11,571 | 33,825 | -5.3 | 31.8 | 7.4 |
| N.A. Built | 17,368 | 6,960 | 24,328 | 18,973 | 4,136 | 23,109 | -8.5 | 68.3 | 5.3 |
| Japan Built | 3,701 | 8,285 | 11,986 | 3,281 | 7,435 | 10,716 | 12.8 | 11.4 | 11.9 |
| SUZUKI | 3,007 | 1,194 | 4,201 | 4,121 | 1,618 | 5,739 | -27.0 | -26.2 | -26.8 |
| N.A. Built | 0 | 0 | 0 | 0 | 539 | 539 | 0.0 | -100.0 | -100.0 |
| Japan Built | 3,007 | 1,194 | 4,201 | 4,121 | 1,079 | 5,200 | -27.0 | 10.7 | -19.2 |
| SUBARU | 5,580 | 2,118 | 7,698 | 5,642 | 2,018 | 7,660 | -1.1 | 5.0 | 0.5 |
| N.A. Built | 2,780 | 315 | 3,095 | 3,009 | 79 | 3,088 | -7.6 | 298.7 | 0.2 |
| Japan Built | 2,800 | 1,803 | 4,603 | 2,633 | 1,939 | 4,572 | 6.3 | -7.0 | 0.7 |
| MITSUBISHI | 3,029 | 1,963 | 4,992 | 4,131 | 1,913 | 6,044 | -26.7 | 2.6 | -17.4 |
| N.A. Built | 941 | 564 | 1,505 | 1,002 | 487 | 1,489 | -6.1 | 15.8 | 1.1 |
| Japan Built | 2,088 | 1,399 | 3,487 | 3,129 | 1,426 | 4,555 | -33.3 | -1.9 | -23.4 |
| TOTAL | 185,791 | 67,574 | 253,365 | 185,148 | 62,769 | 247,917 | 0.3 | 7.7 | 2.2 |
| N.A. Built | 120,527 | 38,013 | 158,540 | 116,749 | 32,691 | 149,440 | 3.2 | 16.3 | 6.1 |
| Japan Built | 65,264 | 29,561 | 94,825 | 68,399 | 30,078 | 98,477 | -4.6 | -1.7 | -3.7 |

* car sales include Mexican built

Source: AIAMC, DesRosiers Automotive Consultants Inc.

• Continued from page 3... Sales in Rebound

rose 11.4% to 446,822 units. As in the first quarter, the rise stemmed from increased production at TMMC in Cambridge and CAMI in Ingersoll, although HCM also raised production in the second quarter.

Production at HCM climbed 1.4% to 202,660 units. Honda builds five vehicles in two plants at their facility in Alliston – the Honda Civic & Acura EL in Plant 1, and the Acura MDX, Honda Pilot and Ridgeline pick-up truck in Plant 2. Three vehicles are made at TMMC's operation in Cambridge, the Toyota Corolla and Matrix in the North Plant and the Lexus RX 330 in the South Plant. Output at TMMC in the first six months of 2005 rose 7.1% to 158,270 units. CAMI in Ingersoll, a 50/50 joint venture between Suzuki and General Motors of Canada, makes only one vehicle, the Chevrolet Equinox. Due to brisk demand in Canada and the US, production at CAMI has accelerated 61.4% in 2005 compared to the same period in 2004.

Vehicles exported from these plants followed a similar pattern as production due to the fact that over 80% of total output was exported, primarily to the US. Overall exports increased 10.3% for the year to date to 360,529 units.

Imports

Vehicle shipments to Canada from Japan, the US and Mexico for the first half of 2005 have increased 13.2% to 193,965 units. While imports from NAFTA countries rose 9.7% to 92,418 units, shipments from Japan were up 16.6% in unit volume to 101,547 units compared to 87,053 vehicles in 2004.

Canada continues to be a net exporter of "Japanese" vehicles in 2005 as over 280,000 vehicles were exported by HCM and TMMC, while all JAMA Canada members' imports during the same period totaled fewer than 194,000 units, for a net export total of 86,000 vehicles.

Motor Vehicle Production in Canada

| | Jan-June 2005 | Jan-June 2004 | % Change |
|----------------------|----------------|----------------|-------------|
| HONDA (HCM) | 202,606 | 199,884 | 1.4 |
| TOYOTA (TMMC) | 158,270 | 147,826 | 7.1 |
| CAMI | 85,892 | 53,213 | 61.4 |
| TOTAL | 446,822 | 400,923 | 11.4 |

Source: JAMA Canada

Motor Vehicle Exports from Canada

| | Jan-June 2005 | Jan-June 2004 | % Change |
|----------------------|----------------|----------------|-------------|
| HONDA (HCM) | 163,157 | 166,035 | -1.7 |
| TOYOTA (TMMC) | 117,165 | 111,248 | 5.3 |
| CAMI | 80,207 | 49,658 | 61.5 |
| TOTAL | 360,529 | 326,941 | 10.3 |

Source: JAMA Canada

Vehicle Imports (Shipments) to Canada

| | Jan-June 2005 | Jan-June 2004 | % Change |
|--------------------|----------------|----------------|-------------|
| JAPAN | 101,547 | 87,053 | 16.6 |
| U.S./MEXICO | 92,418 | 84,268 | 9.7 |
| TOTAL | 193,965 | 171,321 | 13.2 |

Source: JAMA, JAMA Canada



Member News

Subaru Canada's New Head Office

Subaru Canada, Inc. (SCI) earlier this summer celebrated the grand opening of its new Canadian corporate headquarters at 560 Suffolk Court in Mississauga, Ontario.

The new building is well over twice as large as the previous corporate headquarters, and includes two floors of offices, expanded classroom and technical training facilities, and a state-of-the-art warehouse.

"Beautiful as well as functional, safe and comfortable, Subaru's new Canadian headquarters reflects all the best qualities of Subaru as a company," said Norio Osakabe, president, chairman and CEO of Subaru Canada. "In addition, the enhanced employee satisfaction and productivity will enable us to serve both dealers and customers better."

The centrepiece of the new warehouse facility is a computerized inventory control system which significantly enhances productivity and is designed to take advantage of the 30-foot ceilings in the new building. The system uses computerized horizontal carousels, suspended from an iron guide track, that horizontally rotate at the command of the operator. Instead of a stock picker moving to individual bins where parts are stored, the shelves spin and automatically convey the part to the operator in a batched order format. In addition, inventory control and order processing are all conducted using the latest Radio Frequency and barcode technology, and the facility is ISO 14001 approved.

Subaru Canada, Inc. is a wholly owned subsidiary of Fuji Heavy Industries Ltd. of Japan. Headquartered in Mississauga, Ontario, the company markets and distributes Subaru vehicles, parts and accessories through a network of 98 authorized dealers across Canada. For further information on SCI, go to www.subaru.ca.





Frank Johnson, President of Nichirin Inc., at the manufacturing plant in Brantford, Ontario

Supplier Snapshot

Nichirin Inc.

Nichirin Canada was established in 1987 and began the manufacture of hose and tube assemblies for brake, clutch and power steering systems at their plant in Brantford, Ontario. With a dedicated workforce of about 280 associates, Nichirin specializes in hose assemblies for the automotive and motorcycle sectors, and also manufactures parts for ATV's, snowmobiles and other vehicles. "We are a fully integrated manufacturer and offer one of the widest varieties of hose types, fitting designs and tube shapes to meet the different requirements of our customers," according to the President of Nichirin Inc., Frank Johnson.

A wholly-owned subsidiary of Nichirin Co., Ltd., in Kobe, Japan, the leading manufacturer of automotive hoses in Japan, Nichirin Canada was their first North American manufacturing plant. As a supplier to several automakers in North America including Honda, Nissan and GM, Nichirin in Canada has steadily expanded their Ontario plant and assisted in other related manufacturing plants in the United States, most recently with Nichirin Tennessee in 2002. Nichirin is now the head sales office for Canada, the United States as well as Mexico.

For further information on Nichirin in Canada, visit their website at www.nichirincanada.com.

Ontario to open marketing office in Tokyo in 2006

The Ontario government is raising the province's profile in the global marketplace by opening four new International Marketing Centres in major foreign centres, including Tokyo, Minister of Economic Development and Trade Joe Cordiano announced recently. The NDP government in Ontario closed all their foreign offices in the early 1990's as a cost saving measure during an economic recession.

By expanding Ontario's presence around the world, the McGuinty government is taking a decisive step to make sure

foreign direct investment is increased in the province, while also opening new markets to Ontario businesses.

"We're acting on a key priority that will help Ontario businesses break into major markets around the globe," Cordiano said. "Ontario will have a full-time presence in key international locations that will help create new jobs and increase our prosperity."

The four new International Marketing Centres will open in Tokyo, London, Los Angeles, and New Delhi. Ontario has three existing marketing offices in Shanghai, Munich and New York.

Ontario plans to locate the new International Marketing Centres in existing Canadian foreign missions, such as Canadian Embassies, as is the case with the current three centres. The new offices will be operational by early 2006.

Border Coalition issues its 4th Report – Recommends further improvements

While acknowledging that considerable progress has been made getting the border 'right' in the aftermath of 9/11, there are still impediments that impact trade and investment between Canada and the US according to a new report from The Coalition for Secure and Trade-Efficient Borders entitled, ***Rethinking our Borders: A New North American Partnership***.

The Coalition's 4th report focuses on three areas – customs and border management; security and immigration, and transportation and infrastructure – where improvements must be made immediately in order to reduce impediments to the flow of goods and legitimate travelers across the border.

For example, there are now at least 44 agencies between the two countries with a level of jurisdiction over the shared border.

The results are troubling:

- Logistics at the Canada-U.S. border has become a competitive disadvantage for North American business.
- Customs rules are more complex today than ever before and are being enforced differently by different inspectors at different crossings.
- Paperwork and information requirements for border inspections are increasingly onerous.
- At several key crossings there is limited or no access to dedicated lanes for commercial vehicles in the FAST program.
- Business travelers still face increasing delays and complications at the Canada-U.S. border.

The report calls for a renewed sense of urgency on improving the border through a strategic assessment of priorities against the changes and initiatives of the four years since 9/11; a focused approach to enhancing a North American security perimeter; the introduction of a Canada-U.S. 'border pass' with biometric identifiers and immediate investments in infrastructure, especially in the Windsor-Detroit corridor.

The full report is available on our website at www.jama.ca or the website of the Canadian Manufacturers & Exporters website, www.cme-mec.ca.

J.D.Power 2005 Vehicle Dependability Study Results – several Japanese brands among segment leaders

The results of the 2005 Vehicle Dependability Study were released recently by J.D.Power & Associates, and for the eleventh straight year Lexus was the top ranked brand with a score of 139 problems per 100 vehicles for 2002 model year vehicles. The industry average was 237 problems per 100 vehicles. Other Japanese brands scored above the industry average including Infiniti at 178, Toyota at 194, Honda at 201 and Acura at 203.

J.D.Power surveyed over 50,000 original owners of 2002 models earlier this year about current problems with their vehicles.

Among the segment leaders in the 2005 study were the following 2002 model year vehicles:

| | |
|---------------------|----------------|
| Sporty car: | Mazda Miata |
| Premium Luxury car: | Lexus LS 430 |
| Entry SUV: | Honda CR-V |
| Mid-size SUV: | Toyota 4Runner |
| Entry luxury SUV: | Lexus RX 300 |
| Premium luxury SUV: | Lexus LX 470 |

For further information, visit www.jdpower.com.

J.D.Power 2005 Vehicle Dependability Study

Car Segments

Compact Car

Highest Ranked: Chevrolet Prizm

Toyota ECHO
Toyota Prius

Entry Midsize Car

Highest Ranked: Chevrolet Malibu

Oldsmobile Alero
Hyundai Sonata

Premium Midsize Car

Highest Ranked: Buick Century

Buick Regal
Toyota Avalon

Full-Size Car

Highest Ranked: Buick LeSabre

Ford Crown Victoria
Mercury Grand Marquis

Entry Luxury Car

Highest Ranked: Ford Thunderbird

Lincoln LS
Infiniti I35

Mid Luxury Car

Highest Ranked: Lincoln Town Car

Lexus GS 300/GS 430
Buick Park Avenue

Premium Luxury Car2

Highest Ranked: Lexus LS 430

Lexus SC 430
Cadillac Eldorado

Sporty Car

Highest Ranked: Mazda Miata

Chevrolet Camaro
Toyota MR2 Spyder

Premium Sports Car

Highest Ranked: Porsche 911

Honda S2000
Chevrolet Corvette

Truck Segments

Midsize Van

Highest Ranked: Ford Windstar

Toyota Sienna
Mercury Villager

Full-Size Van

Highest Ranked: Ford E-Series

Chevrolet Express
Dodge Ram Van

Midsize Pickup

Highest Ranked: Chevrolet S-10 Pickup

GMC Sonoma
Toyota Tacoma

Light-Duty Full-Size Pickup

Highest Ranked: Cadillac Escalade EXT

Ford F-150 LD
Toyota Tundra

Heavy-Duty Full-Size Pickup

Highest Ranked: Chevrolet Silverado HD

Ford F-250/F-350 Super Duty
GMC Sierra HD

Entry SUV

Highest Ranked: Honda CR-V

Toyota RAV4
Jeep Liberty

Midsize SUV

Highest Ranked: Toyota 4Runner

Toyota Highlander
Ford Explorer (Total)

Full-Size SUV

Highest Ranked: GMC Yukon/Yukon XL

Ford Expedition (tie)
Toyota Sequoia (tie)

Entry Luxury SUV

Highest Ranked: Lexus RX 300

Acura MDX
Infiniti QX4

Premium Luxury SUV

Highest Ranked: Lexus LX 470

Cadillac Escalade (tie)
Lincoln Navigator (tie)

Source: J.D.Power and Associates 2005 Vehicle Dependability Study

Motor Vehicle Industry in Japan 2005

| Passenger Cars, Trucks, Buses | | TOTAL |
|---------------------------------------|---------------|-----------|
| PRODUCTION ¹ | Jan-June 2005 | 5,484,421 |
| | Jan-June 2004 | 5,306,113 |
| | % change | 3.4 |
| EXPORTS ² | Jan-June 2005 | 2,458,036 |
| | Jan-June 2004 | 2,390,125 |
| | % change | 2.8 |
| SALES/ REGISTRATIONS ³ | Jan-June 2005 | 3,102,860 |
| | Jan-June 2004 | 3,042,435 |
| | % change | 2.0 |
| IMPORT VEHICLE SALES ^{4*} | Jan-June 2005 | 135,331 |
| | Jan-June 2004 | 138,985 |
| | % change | -2.6 |

* (including models built by Japanese automakers overseas) source: 1,2-JAMA; 3-JADA, JMVA; 4-JAIA