

The Japanese Automotive Industry in Canada, 2008

JAMA  Canada

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JAMA Canada was established as a non-profit trade association in 1984, and continues to promote greater understanding on economic and trade issues in the motor vehicle sector and to encourage closer cooperation between Canada and Japan.



Overview of the Japanese Automotive Industry in Canada

Production in Canada – 2007

Light vehicle output at Honda (HCM in Alliston, Ontario), Toyota (TMMC in Cambridge, Ontario) & CAMI (a 50/50 joint venture between Suzuki and General Motors in Ingersoll, Ontario) totaled 871,470 units, down slightly from 2006.

Vehicle Manufacturing Operations – 2008

		HONDA of CANADA MFG (HCM)	 HONDA
		Location: Alliston, Ontario	
Civic Coupe	Ridgeline	Start-up: November, 1986	
		Cumulative Investment: \$2.15 billion	
		Vehicles Built: Plant 1: Civic coupe/sedan, Acura CSX Plant 2: Acura MDX, Ridgeline, Civic sedan	
		Employment: 4,600	
Civic Sedan	Acura MDX	Production: 390,580 - 2007	
		Export: 300,960 - 2007	
		Total 2-shift capacity: 390,000 units per year	
			
	Acura CSX		

		HONDA of CANADA MFG (HCM)	 HONDA
		Location: Alliston, Ontario	
4-Cylinder i-VTEC		Construction Start-up: 2006	
		Cumulative Investment: \$154 million	
		Items Built: 1.8L i-VTEC 4 cylinder engines	
		Employment: 340	
		Projected Production: 200,000	
		Start-up: 2008	



Suzuki XL7



Equinox

CAMI AUTOMOTIVE (SUZUKI & GM CANADA)



Location:	Ingersoll, Ontario
Start-up:	April, 1989
Cumulative Investment:	\$2.0 billion
Vehicle:	Suzuki XL 7, Chevrolet Equinox. Pontiac Torrent
Employment:	2,600
Production:	178,141 - 2007
Export:	149,307 - 2007
Total 2-shift capacity:	260,000 units per year



Torrent



Corolla



Matrix

TOYOTA MOTOR MANUFACTURING CANADA (TMMC)



Location:	Cambridge, Ontario
Start-up:	November, 1988
Cumulative Investment:	\$3.2 billion
Vehicles Built:	North Plant: Corolla, Matrix South Plant: Lexus RX350
Employment:	5,000
Production:	302,749 - 2007
Export:	240,889 - 2007
Total 2-shift capacity:	300,000 units per year



Lexus RX 350



RAV4

TOYOTA MOTOR MANUFACTURING CANADA (TMMC)



Location:	Woodstock, Ontario
Start-up:	November, 2008 (projected)
Cumulative Investment:	\$1.1 billion
Vehicles Built:	RAV 4
Employment:	2,000
Production:	150,000



Class 4 - 7 Trucks

HINO MOTORS CANADA



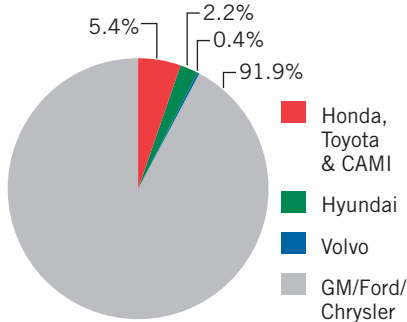
Location:	Woodstock, Ontario
Start-up:	April 2006
Cumulative Investment:	\$3 million (equipment only)
Vehicle:	Class 4 - 7 medium duty trucks
Employment:	50
Production:	1,630 - 2007
Export:	Only for Canada
Total capacity:	2,000 units per year

Total Japanese brand production (including Honda, Toyota & Suzuki) in 2007 was 724,732 units, up 1.0% over 2006. As a joint venture, CAMI makes vehicles for both GM and Suzuki. Overall, Japanese automakers in Canada built more than 1.4 vehicles in Canada for every one sold.

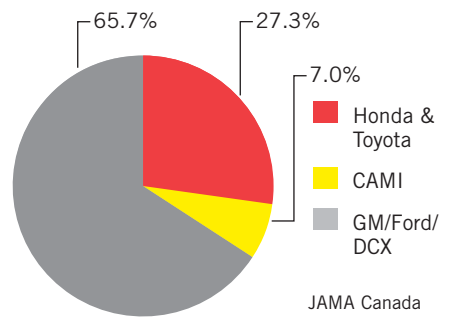
In the medium duty truck segment, Hino Motors Canada started production of commercial trucks in Woodstock Ontario in April 2006. Total production for 2007 reached 1,630 units (Class 4 – 7 trucks). At this time, all production was built for the Canadian market.

Light Vehicle Production in Canada

Total 1989 – 1.9 million



Total 2007 – 2.5 million

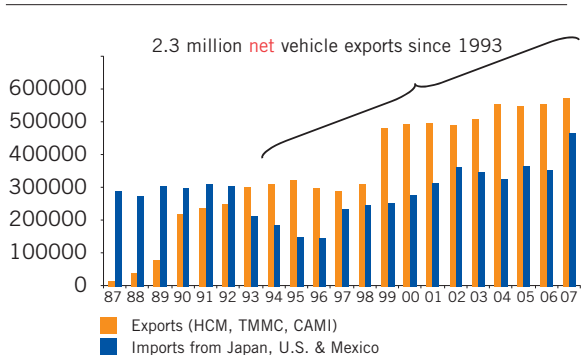


Light Vehicle Exports – 2007

For Japanese affiliated plants (Honda, Toyota & CAMI), Japanese brand exports in 2007 rose about 3.3% to just over 572,000 units – an export to production ratio of about 79%. While most were shipped to the US, about 33,400 units were sent to non-US export markets in 2007.

Canada has been a net exporter of 'Japanese' vehicles every year since 1993. Over these 15 years, over 2.3 million more vehicles have been exported from Canada than have been imported from Japan, the US and Mexico combined.

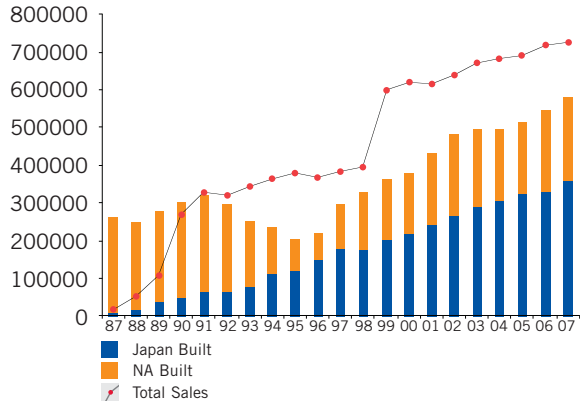
Exports & Imports (1987 - 2007)



Light Vehicle Sales – 2007

For JAMA Canada members as a group, combined light vehicle sales were up 5.9% in 2007 to a new record of 580,339 units, representing a 35.1% market share. Passenger car sales climbed 4.8% to 408,849 units, while light trucks jumped 8.6% to almost 171,490 units. In 2007, five of every eight vehicles sold in Canada were built in North America. North American-built sales made a dramatic gain of 10.7% in 2007 to 363,161 vehicles, while sales of imports from Japan fell 1.2% to 217,178 units.

Light Vehicle Sales in Canada

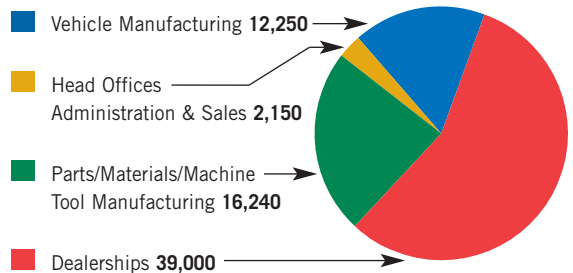


Employment

The Japanese auto industry in Canada is multi-faceted and currently employs over 69,000 Canadians in manufacturing (vehicles and auto parts), import, export, transportation, distribution, sales and service.

In the manufacturing sector, four motor vehicle manufacturers (HCM, TMMC, CAMI and Hino) employ about 12,250 associates and team members, and over 16,000 jobs have been created in Canada at 61 parts, tool/die/mold, materials and other operations supplying the North American auto industry. There are about 39,000 Canadians employed in over 1,100 dealerships across the nation. Finally, there are over 2,100 people employed in the regional and head offices of JAMA Canada members.

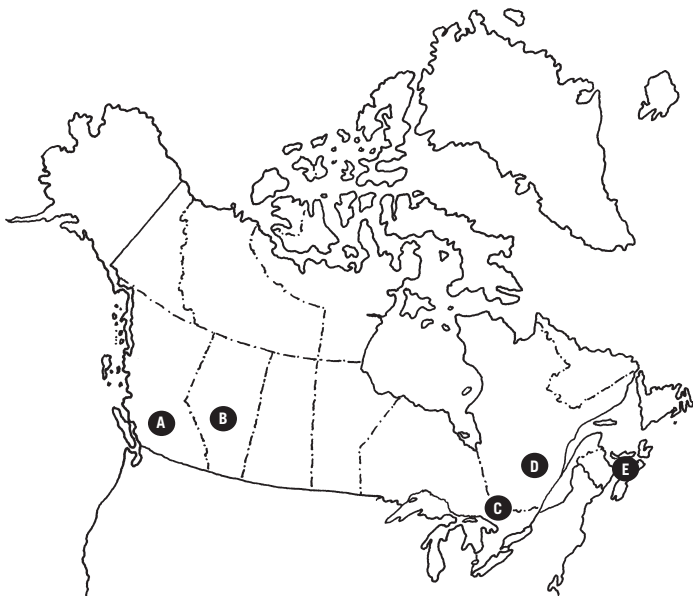
Total Employment in Canada over 69,000 and steadily increasing



JAMA Canada Members Operations

Type of operation:

1. Head Office
2. Regional Office / Parts Distribution Facility
3. Vehicle Manufacturing & Assembly Plant
4. Parts Manufacturing Plant
5. Port / Transportation Facility
6. R&D – Cold & Inclement Weather Testing



A British Columbia

Hino 2,5
Honda 2,5
Mazda 2,5
Nissan 2,5
Suzuki 2,5
Toyota 2,4,5

B Alberta

Toyota 2
Nissan 2

C Ontario

Hino 1,2,3
Honda 1,2,3,5
Mazda 1,2
Mitsubishi 1,2
Nissan 1,2
Subaru 1,2
Suzuki 1,2,3,5
Toyota 1,2,3,5,6

D Quebec

Hino 2
Honda 2
Mazda 2
Nissan 2
Subaru 2
Suzuki 2
Toyota 2

E Nova Scotia

Honda 2,6
Toyota 2

Auto Parts

- There are over 60 auto parts, materials and machine tool plants currently operating in Canada.



Manufacturing in Canada

- Vehicle Manufacturing Plants
- Auto Parts
- Materials, Machine Tools, Sub-Assembly & Services

VEHICLE MANUFACTURING PLANTS

1. Honda of Canada Manufacturing
2. Toyota Motor Manufacturing Canada (Cambridge)
3. Toyota Motor Manufacturing Canada (Woodstock)
4. Hino Motors Canada, Ltd.
5. CAMI Automotive (Suzuki / GM Canada)

AUTO PARTS

6. Canadian Autoparts Toyota Inc. (CAPTIN)
7. Waterville TG Coaticook
8. Waterville TG Inc.
9. Bridgestone/Firestone Canada Inc.
10. NTN Bearing Mfg. Canada
11. F & P Mfg. Inc.
12. Quality Safety Systems Co. (QSS)
13. Meritor Suspension Systems Co.
14. Nichirin Inc.
15. DDM Plastics Inc.
16. TS Tech Canada Inc.
17. Vuteq Canada Inc.
18. Bridgestone/Firestone Canada Inc.
19. Yachiyo of Ontario Mfg. Inc.
20. Freudenberg-NOK
21. Omron Dualtec Automotive Electronics Inc. (Relay Div.)
22. Craft Originators Inc.
23. Intertec Systems
24. Trimont Manufacturing Inc. (Markham)
25. Trimont Manufacturing Inc. (Scarborough)
26. Listowel Technology Inc.
27. AGC Automotive Canada Inc.
28. Dyna-Mig Mfg. of Stratford Inc.
29. Sanoh Canada, Ltd.
30. Jefferson Elora Corp. (JEC)
31. KTH Shelburne Mfg. Inc.
32. Kumi Canada Corporation
33. Musashi Auto Parts Canada Inc.
34. Nagata Auto Parts Canada Co., Ltd.
35. Denso Manufacturing Canada, Inc. (DMCN)
36. Omron Dualtec Automotive Electronics Inc. (Switch Div.)
37. Showa Canada Inc.
38. Waterville TG Ontario
39. TG Minto Corporation

40. Ube Automotive North America Sarnia Plant, Inc.
41. FIO Automotive Canada Corp.
42. Aisin Canada Inc.
43. Trim Masters Inc.
44. Kasai Canada Inc.
45. SETEX Canada
46. Amino North America Corporation
47. Omron Dualtec Automotive Electronics Inc. (ECU Div.)
48. Toyotetsu Canada Inc.
49. Toyota Boshoku (2008 start-up)
50. Aisin Canada Inc. (2008 start-up)
51. Metaldyne Vibration Control Products
52. Hayashi Canada Inc.
53. Takumi Stamping Canada Inc. (2008 start-up)

MATERIALS, MACHINE TOOLS, SUB-ASSEMBLY & SERVICES

54. Sanyo Canadian Machine Works Inc.
55. Aclo Compounders Inc.
56. Canada Mold Technology Inc.
57. Z-Line (US Steel Canada)
58. SMC Pneumatics (Canada) Ltd.
59. DJ Galvanizing (formerly DNN Galvanizing)
60. Moizen Steel Inc. (c/o Metal One Canada Corp.)
61. Durez Canada
62. YM Technology Inc.
63. Maple Automotive Corp.
64. Aar-Kel Moulds Ltd.

65. Kintetsu World Express (Canada) Inc.
66. Horiba Automotive Test Systems Inc.
67. Toyota Tsusho Canada, Inc. (Woodstock) (2008 start-up)
68. Tsubaki of Canada Ltd.
69. NGF Canada Ltd.
70. Green Metals Inc. (2008 start-up)
71. Maple Automotive Corp. (Woodstock) (2008 start-up)
72. Toyota Tsusho Canada, Inc.
73. Hokuto North America Inc.

JAMA Canada Members



Hino Motors Canada, Ltd.

395 Ambassador Drive, Mississauga, Ontario L5T 2J3



HONDA



ACURA

Honda Canada Inc.

715 Milner Avenue, Scarborough, Ontario M1B 2K8

Honda of Canada Mfg.

4700 Tottenham Road, Box 5000, Alliston, Ontario L9R 1A2



Mazda Canada Inc.

55 Vogell Road, Richmond Hill, Ontario L4B 3K5



Mitsubishi Motor Sales of Canada, Inc.

2090 Matheson Boulevard East, Mississauga, Ontario L4W 5P8



Nissan Canada Inc.

5290 Orbitor Drive, Mississauga, Ontario L4W 4Z5



Subaru Canada, Inc.

560 Suffolk Court, Mississauga, Ontario L5R 4J7



Suzuki Canada Inc.

100 East Beaver Creek Road, Richmond Hill, Ontario L4B 1J6



Toyota Canada Inc.

One Toyota Place, Scarborough, Ontario M1H 1H9



Toyota Motor Manufacturing Canada

1055 Fountain Street North, Cambridge, Ontario N3H 5K2

**For further information, visit our website at
www.jama.ca**