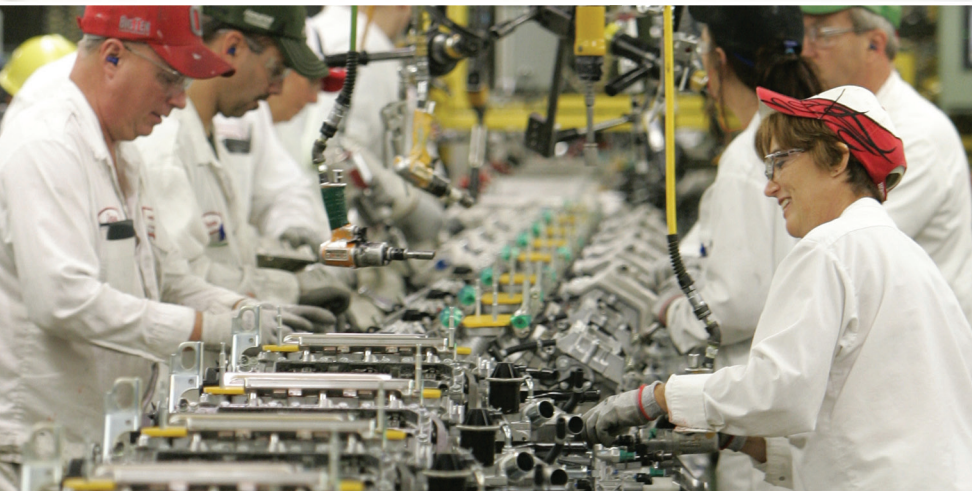


Japanese-Brand
Vehicles in America:

FREER TRADE,
GREATER GROWTH,
MORE JOBS



JAMA

JAPAN AUTOMOBILE MANUFACTURERS ASSOCIATION, INC.

NOVEMBER 2013

JAMA in the News

2013



Subaru to Expand Indiana Plant Capacity, Add Impreza Production from *Automotive News*, May 7, 2013



Toyota to Build Lexus ES 350 in Kentucky from *KYPost.com*, April 19, 2013



Mitsubishi Says New Models Show It's Staying in U.S. from *USA Today*, March 31, 2013



Honda to Build \$70 Million Plant in Marysville from *Dayton Business Journal*, May 14, 2013



Mazda: Revamped 2014 Mazda3 to Lead Compact Segment in MPG from *Automotive News*, June 26, 2013



Nissan Brings 900 Jobs with U.S. Manufacturing 30th Anniversary from *Business & Heritage Clarksville*, July 1, 2013



Hino Trucks Continues U.S. Expansion to Serve Class 5-7 Markets from *NGT News*, February 11, 2013

JAMA in America: An Integral Part of the U.S. Economy and Free Trade Proponent

As this brochure goes to press, U.S. President Barack Obama, who has made trade expansion a centerpiece of his economic agenda, is pushing for a 12-country Pacific Rim free trade agreement to be concluded in the near future.

Movement on the proposed Trans-Pacific Partnership (TPP) continues amid a whirlwind of multilateral and bilateral negotiations, creating a dynamic sense of progress and opportunity for growth across the region. Leaders of negotiating countries, in Japan and elsewhere, are proving to be optimistic partners as they address differences between domestic interests, consult their industries, and offer pathways for agreement. If the agreement is promulgated, the TPP will represent the most bold and sweeping trade agreement in 20 years, encompassing about one-third of total world trade.

As in many arenas, the possibility of significant leaps forward, like the TPP, represent the quieter accomplishment of thousands of smaller steps taken over time with less fanfare and often considerable struggle, but nonetheless moving us to a more progressive and rewarding place.

For example, industries such as automobile manufacturing once feared international competition. Now we know that healthy competition is eventually good for everyone: the consumers, the workers, the manufacturers, and the economies of open nations. The U.S. auto industry has been transformed and remade on a stronger basis. Japanese manufacturers have invested more than \$35 billion in the U.S. to become an integral part of the U.S.

domestic automobile industry, earning them a large footprint in the American economy. All told, more than 1.36 million American jobs are tied to Japanese-brand automakers, making the Japan Automobile Manufacturers Association (JAMA) member companies among America's largest job creators. In 2012, JAMA companies produced 3.3 million vehicles in the U.S., amounting to approximately 32% of total U.S. automobile production, and purchased a record-high \$51.3 billion in U.S. auto parts. An all-time high, 70% of the Japanese-brand vehicles sold in the U.S. are produced in North America. JAMA companies exported 336,000 cars and trucks from the U.S., also a new record, and 20,000 more Americans got jobs in 2012 due to the growth of JAMA members' direct operations and their dealer networks in the U.S. In total, JAMA members' participation in the U.S. auto industry provided \$85 billion in personal income for Americans.

As you read this brochure, we hope you will better understand JAMA members' expansive contributions to the U.S. economy, which is made possible by increasingly open U.S.-Japan trade in the automobile sector.



www.jama.org

Auto Production, Invest U.S. Econo

Japanese automakers' American operations have supported U.S. economic growth for many years. In 2012, they operated 26 manufacturing plants and 35 major R&D and design centers in 17 states around the country. Their manufacturing plants alone invested more than \$35 billion in the U.S. economy through the production of nearly 3.3 million vehicles and more than 3.8 million engines. (See the map for facility locations and types.)



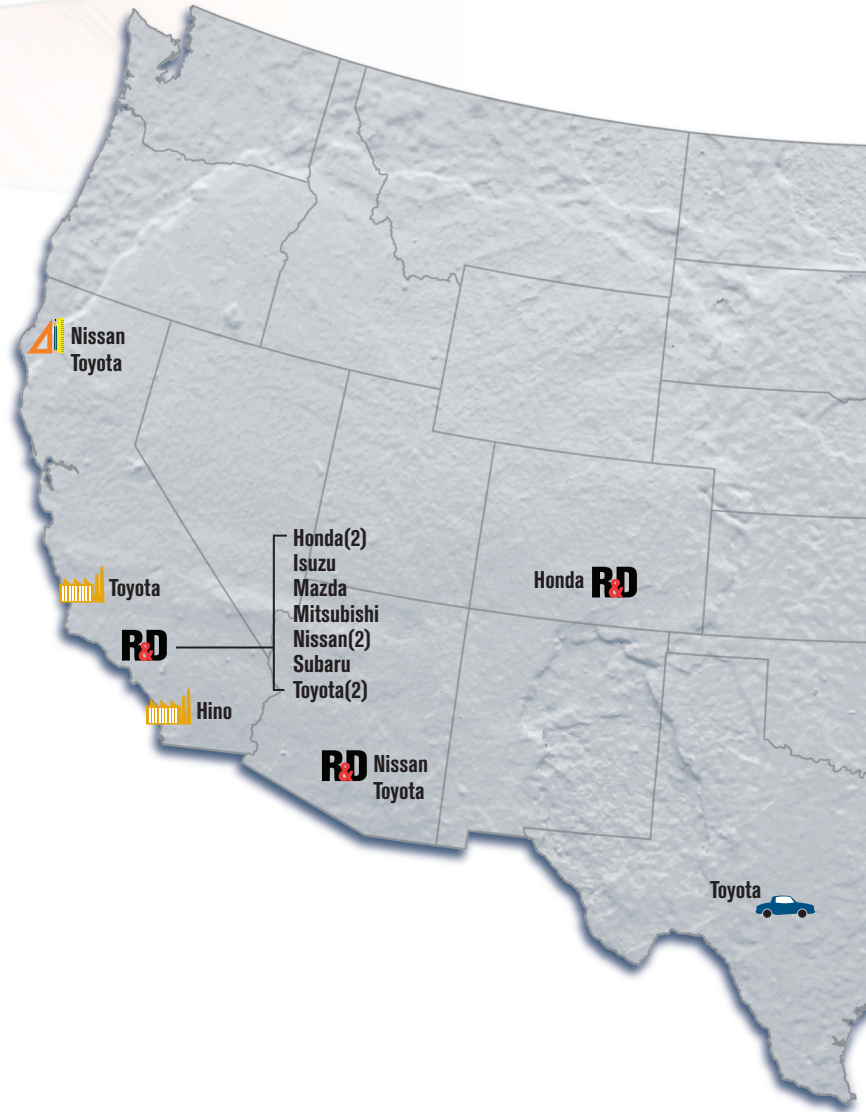
Hino Motors Manufacturing, U.S.A., Inc. • Ontario, CA



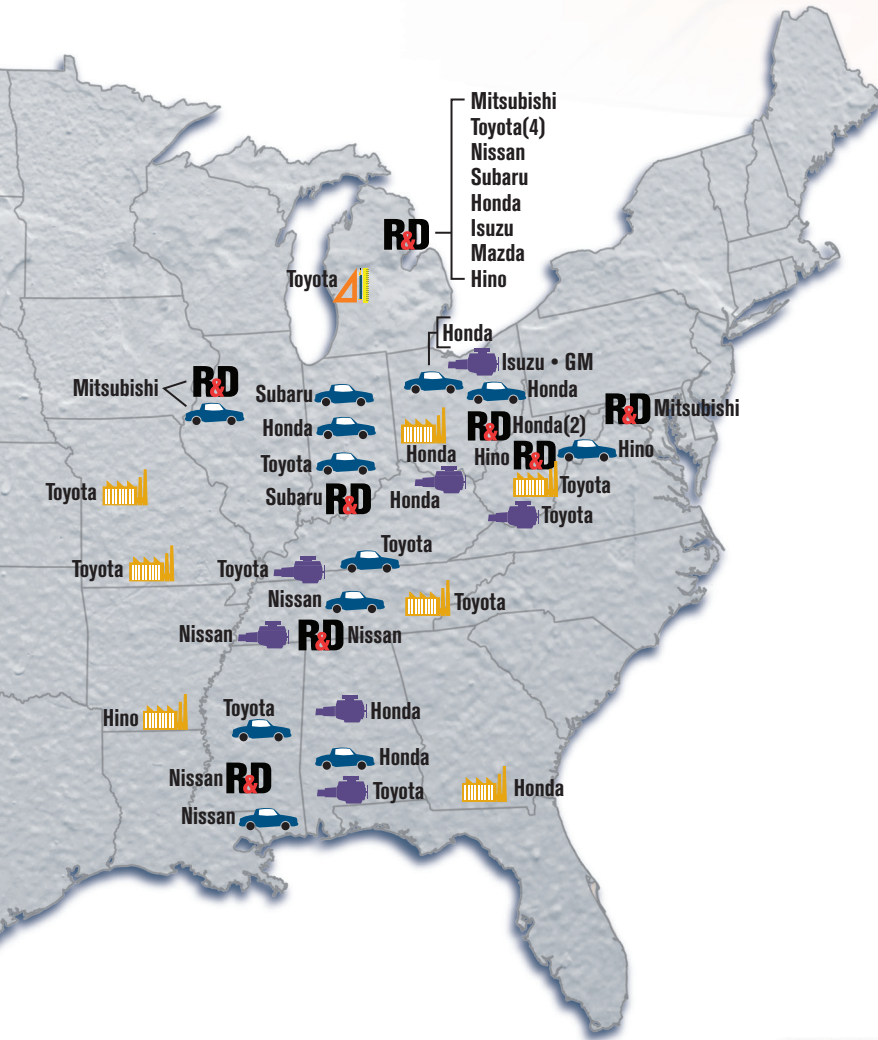
Honda R&D Americas, Inc. • Los Angeles, CA



Isuzu Manufacturing Services of America, Inc. • Detroit, MI



ment, and R&D Support mic Growth



Nissan Technical Center North America, Inc. • Sunnyvale, CA



Mitsubishi Motors North America, Inc. • Normal, IL



Toyota Motor Manufacturing, Texas, Inc. • San Antonio, TX



Subaru Research and Development, Inc. • Ann Arbor, MI

Map Key

- Vehicle Manufacturing Plant
- Engine Manufacturing Plant
- Parts Manufacturing Plant
- R&D Center
- Design Center

Please see pages 12,13, and 14 for more detail on these facilities.

Japanese Automakers Are U.S. Job Creators

Japanese automakers in the U.S. are reinforcing their reputation as job creators. In 2012, they continued to expand their American-based operations, directly employing more than 81,000 manufacturing, distribution, and R&D employees. Their dealer networks, meanwhile, employed an additional 327,000.

Factoring in employees of U.S. private-sector companies (intermediate workers) that supply these operations — and the direct “spin-off” jobs supported by the spending of all direct and intermediate employees — Japanese automakers contributed to an estimated 1.36 million U.S. jobs in 2012. This is an increase of more than 125,000 jobs over 2011 estimates.

Employment (Number of Employees in 2012)

	Automakers	New Vehicle Dealers	Total
Manufacturing	57,939		
R&D	4,196		
Distributors	18,899		
Subtotal (Direct Employees)	81,034	327,477	408,511
Suppliers (Intermediate)	218,000	106,000	324,000
Spin-off	383,000	245,000	628,000
Grand Total	682,034	678,477	1,360,511

Source: Japanese Automakers/Professor Thomas Prusa, Rutgers University
 Note: Supplier and spin-off employment are estimates.



Toyota Gcalty Design Research, Inc. • Newport Beach, CA



Nissan North America, Inc. • Canton, MS

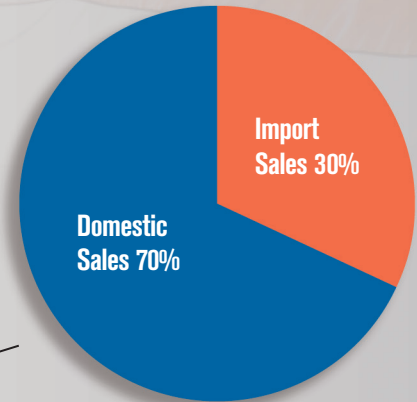
70% of Japanese-Brand Vehicles Sold in the U.S. Are Built in North America

Japanese automobile companies currently build a record-high 70% of the vehicles they sell in the U.S. within North America (U.S., Canada, and Mexico).

Japanese-Brand Sales in the U.S. (Units)

Source: Ward's Automotive Reports

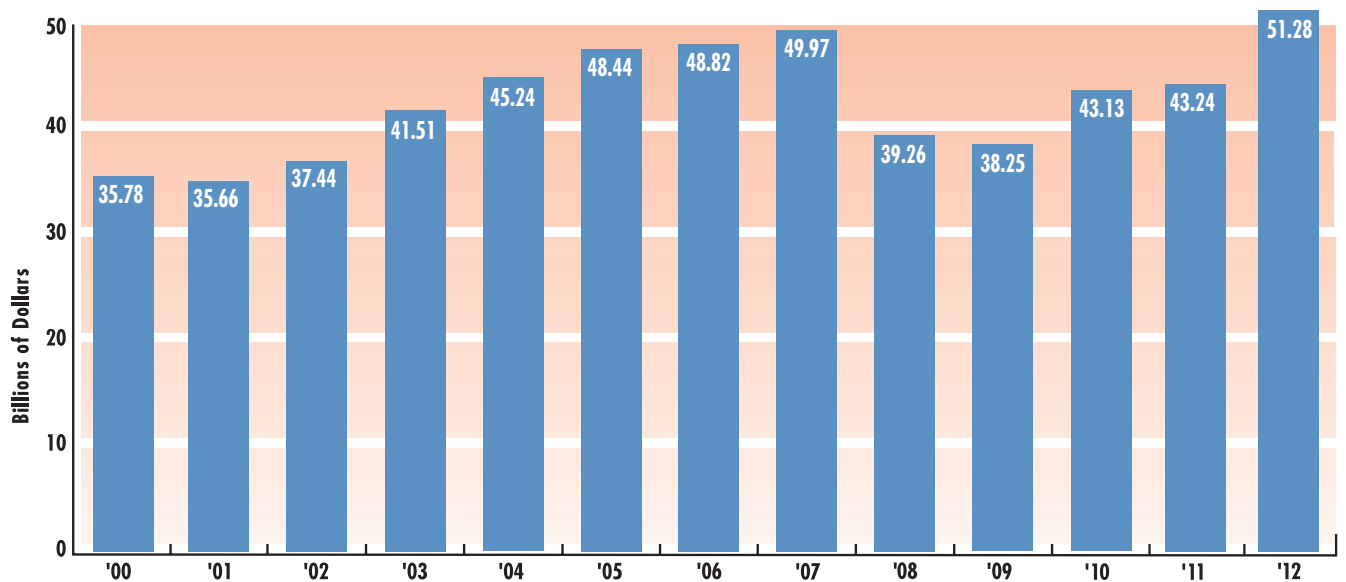
Year	Total Sales	Domestically Built	Imported	% Domestic
2007	5,966,527	3,743,624	2,222,903	63%
2008	5,238,985	3,240,634	1,998,351	62%
2009	4,209,768	2,764,228	1,445,540	66%
2010	4,477,398	3,066,401	1,410,997	68%
2011	4,459,283	3,025,174	1,434,109	68%
2012	5,345,793	3,742,055	1,603,738	70%



Note: Industry statistical sources record vehicles built in the North American Free Trade Agreement (NAFTA) region as domestic U.S. sales. Historical data is available at www.jama.org/industry_trends.html.

Purchases of U.S. Auto Parts Reach an All-Time High

In 2012, purchases of U.S. auto parts by Japanese automakers reached an all-time high, topping \$51 billion. These purchases demonstrate their ongoing commitment to using U.S.-based suppliers and contributing to the overall American economy.



Source: Japan Automobile Manufacturers Association, Inc. Note: Data includes purchases of U.S. auto parts by JAMA members for vehicles built in both the U.S. and Japan.