Brussels, 8 July 2013

JAPAN No. 377

JC/102/13
LC/63/13
BARs/69/13
WG-TEP-EXT/67/13
TF-EOBD/33/13
TF-TR/25/13
WG-AE/59/13
WG-CVD/54/13
WG-PS/126/13
Mr. J. Estavoyer, PSA Peugeot Citroën
Mr S. Dies, Renault
Mr. R. Braeutigam, Volkswagen
Mr. M. Missbach, Volkswagen
Mr. G. Thöne, Volkswagen

Copy: ACEA Management

Subject: Japan monthly report – June 2013

Please find attached the June 2013 report of the ACEA representative office in Tokyo.

We remain at your disposal should you need any further information.

Best regards,

Erik Bergelin

Encl.

Ref. ACEA: 20130817

ACEA TOKYO OFFICE
MONTHLY REPORT
JUNE 2013

Call on the MLIT Vice Minister for International Affairs

Along with the EBC Chairman and the chairs of the EBC Railways, Airlines and Freight Forwarders Committees, Mr Millington called on Mr Ishizu, Vice Minister for International Affairs, MLIT, on 12 June to explain the expectations of European industry for the FTA negotiations.

Mr Millington focused on Japan's adoption of UN Regulations and the tax discrimination in favour of kei-cars. While ACEA welcomed the MLIT's Roadmap for the Adoption of Additional UN Regulations published on 29 March as a step in the right direction, there were still areas not covered by the roadmap. Mr Ishizu merely said that Japan had presented the Roadmap to WP 29 and that it had been accepted unanimously by the other Contracting Parties. His response suggested that MLIT considers that it has fulfilled its commitment in the Scoping Exercise to provide a roadmap for the adoption of UN Regulations.

EU-Japan FTA Negotiations

Prior to the second round of negotiations in the week of 24 June, Mr Millington had a three hour briefing meeting with the DG Trade and DG Enterprise officials who are responsible for the automobile industry aspects of the negotiations.

Mr Petricionne, the Chief EU Negotiator, debriefed the EBC Sector Chairmen on 28 June. He said that the EU had not expected too much from the second round. The third round in October would be a "moment of truth." By then, the EU would have a clearer idea of where the negotiations were going. He dampened expectations that everything could be resolved in the negotiations. The EU needed to prioritise issues which could realistically be resolved by an FTA. Other issues would need to be left for future resolution. It would therefore be important to put in place processes for solving such issues beyond the end of the negotiations.

DG Trade and DG Enterprise will provide a debriefing on the automobile aspects of the negotiations in a telephone conference on 8 July.

Market Data

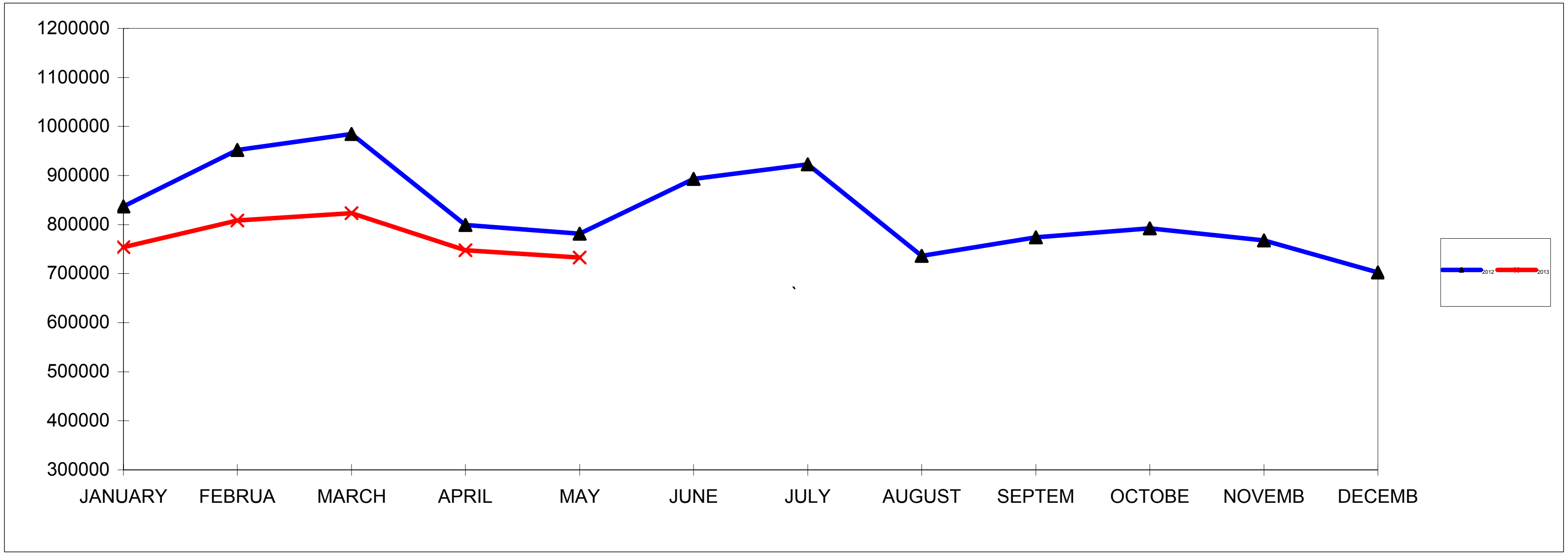
The latest market statistics are attached.

ACEA Tokyo Office

5 July 2013

Table 1

Japan: Automobile Production
May, 2013



	JANUARY	FEBRUARY	MARCH	APRIL	MAY	JUNE	JULY	AUGUST	SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER	TOTAL
2012	837.197	952.268	984.567	799.474	781.340	893.149	922.685	735.999	773.990	792.166	767.530	702.285	9.942.650
2013	754.054	808.194	823.145	747.730	732.714								3.865.837

	Passenger Cars				Trucks				Buses			TOTAL
	Standard-sized Cars	Small-sized Cars	Kei Cars	Sub-Total	Standard-sized	Small-sized	Kei	Sub-Total	Big-sized	Small-sized	Sub-Total	
May-13	365.005	129.248	126.026	620.279	46.276	23.120	32.130	101.526	700	10.209	10.909	732.714
May-12	363.734	172.295	136.751	672.780	45.791	21.441	32.635	99.867	886	7.812	8.698	781.345
13 / 12	100,3	75,0	92,2	92,2	101,1	107,8	98,5	101,7	79,0	130,7	125,4	93,8

SOURCE : JAMA

JAPAN NEW AUTOMOBILE REGISTRATIONS: May, 2013

	This Month	13/'12 %	Year to Date	13/'12 %
Standard-Sized Cars	97.314	98,2	586.373	90,2
Imports	16.952	108,3	86.824	107,9
Small-Sized Cars	94.662	84,7	631.055	86,2
Imports	7.804	184,8	43.035	127,4
Mini Cars	116.460	91,6	715.177	100,6
Total Passenger Cars (a)	308.436	91,3	1.932.605	92,3
Imports (b)	24.756	124,6	129.859	113,6
Standard-Sized CV's	9.033	94,8	55.430	95,9
Imports	183	92,4	916	90,2
Small-Sized CV's	17.457	114,2	96.066	102,8
Imports	1.027	139,0	5.303	107,2
Mini-CV's	32.089	102,1	171.525	89,5
Total CV's (c)	58.579	104,2	323.021	94,2
Imports	1.210	129,1	6.219	104,3
Buses (d)	633	86,0	5.141	84,9
Imports		-		-
Total (excl. mini vehicles)	219.099	92,7	1.374.065	89,2
Total (incl. mini vehicles) (a + c + d)	367.648	93,1	2.260.767	92,6
Imports	25.968	124,8	136.097	113,2
Passenger Car Imports from Transplants (x)	4.219	172,1	26.376	119,0
Total Pure Passenger Cars Imports (b - x = y)	20.537	117,9	103.483	112,4
Pure Car Imports as Share of Total Passenger Car Market y/a %	6,7%		5,4%	

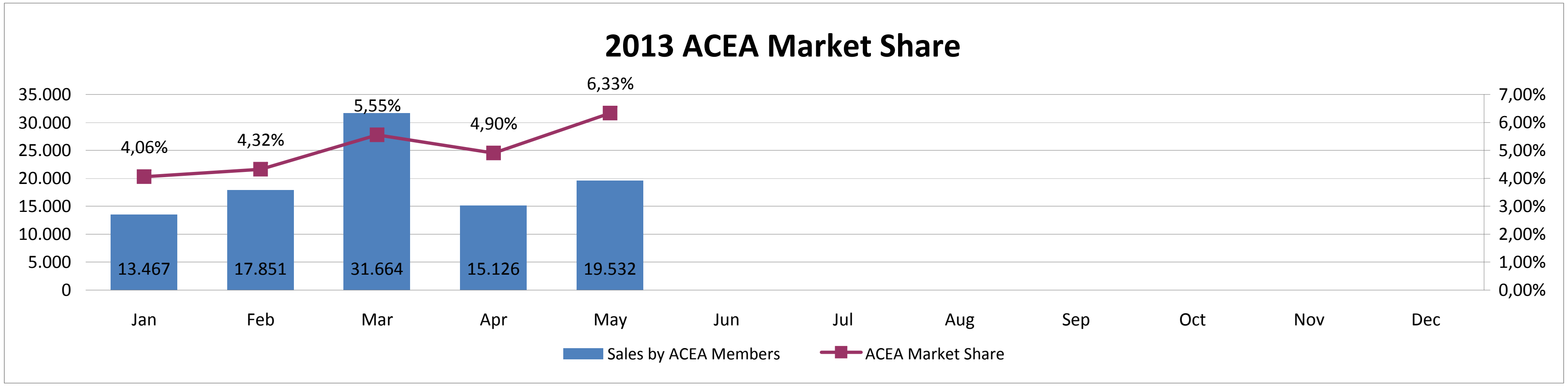
Source: JADA, JAIA, Zenkei

Note: 1) % figures : 2010 registrations as percentage of those in previous year.
2) Standard sized car: displacement in excess of 2000 cc.
3) Small sized car: displacement between 661 & 2000 cc.
4) Mini Car: 660 cc & less.

2013 ACEA Market Share - Monthly

2013 - ACEA Share	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
BMW	2.839	3.627	7.608	3.675	4.883								22.632
Fiat	389	683	1.264	715	1.075								4.126
Ford Europe	0	0	0	0									0
GME	1	1	0	0	0								2
Land Rover & Jaguar	440	287	483	249	362								1.821
Mercedes-Benz	2.407	3.227	6.446	2.846	4.127								19.053
Porsche	248	278	473	455	367								1.821
PSA	492	712	1.195	526	683								3.608
Renault	180	259	530	184	252								1.405
Volvo	396	947	1.903	955	1.225								5.426
VW & Audi	6.075	7.830	11.762	5.521	6.558								37.746
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
Sales by ACEA Members	13.467	17.851	31.664	15.126	19.532								97.640
Total Passenger Car Sales in Japan (b)	332.066	412.856	570.691	308.556	308.436								1.932.605
ACEA Market Share (a) / (b)	4,06%	4,32%	5,55%	4,90%	6,33%								5,05%
ACEA Members Total Sales (Jan - May 2013)	97.640												
ACEA Members Share (Average Jan - Dec 2013)	5,05%												

Source: JAIA, JAMA



AUTOMOBILE EXPORTS BY REGION

May, 2013

Region	May			Year to Date		
	Units	Composition	13/12%	Units	Composition	13/12%
Asia	43.356	12,1%	86,3	211.992	11,3%	83,0
Middle East	45.784	12,7%	114,3	242.368	12,9%	110,7
EU	25.829	7,2%	82,4	133.161	7,1%	79,2
Europe	49.715	13,8%	77,0	307.001	16,3%	86,1
U.S.A	134.704	37,4%	93,8	652.320	34,6%	91,5
North America	146.569	40,7%	94,1	728.496	38,7%	90,2
Central America	10.845	3,0%	90,2	60.126	3,2%	95,1
South America	15.981	4,4%	97,8	82.029	4,4%	93,4
Africa	12.869	3,6%	99,2	76.562	4,1%	110,2
Oceania	34.376	9,6%	96,9	173.126	9,2%	88,9
Others	257	0,1%	66,4	2.035	0,1%	75,8
TOTAL	359.752	100,0%	92,8	1.883.735	100,0%	91,6

Source: JAMA

Automobile Exports by Value (Million Yen, %)
May, 2013

		US		EU		ASIA		TOTAL	
		VALUE	% Rate of Increase '13/'12	VALUE	% Rate of Increase '13/'12	VALUE	% Rate of Increase '13/'12	VALUE	% Rate of Increase '13/'12
Automobiles (8701.10-9, 8701.20, 8701.90.9, 8702/8706)	This month	287.585	13,1%	53.733	-1,3%	113.510	-15,5%	795.098	5,5%
	YTD	1.360.952	8,5%	258.166	-13,9%	556.384	-17,2%	4.014.637	0,8%
Passenger Cars (8703.21/8703.90)	This month	282.371	13,7%	52.084	-1,8%	78.096	-17,6%	684.057	6,3%
	YTD	1.321.354	8,2%	249.955	-14,5%	377.076	-17,5%	3.417.917	1,4%
Buses/Trucks (8702, 8703.10, 8704/8705)	This month	4.628	-18,9%	1.629	17,7%	26.903	-15,2%	100.100	-1,1%
	YTD	38.320	18,4%	8.172	7,5%	134.074	-24,7%	541.591	-4,1%

%: change over June 2010

Source: Ministry of Finance

Note : Total = Global Exports