



ACEA

Brussels, 6 December 2010

JAPAN No. 300

JC/227/10
LC/156/10
BARs/207/10
TEP-EXT/85/10
AH-TR/38/10
WG-AE/124/10
WG-CVD/97/10
Mr. J. Estavoyer, PSA Peugeot
Citroën
Mr. N. Piolot, PSA Peugeot
Citroën
Dr. G. Bremer, Volkswagen
Mr. G. Thöne, Volkswagen

Copy: ACEA Management

Subject: Japan monthly report – November 2010

Please find enclosed the November 2010 report of the ACEA representative office in Tokyo.

We remain at your disposal should you need further information.

Best regards,

Erik Bergelin

Encl.

Ref. ACEA: 20101497

**ACEA TOKYO OFFICE
MONTHLY REPORT
November 2010**

Pedestrian Protection

The MLIT has confirmed to the European Commission that, as requested by ACEA, it will postpone until 2015 the application of the Phase II pedestrian protection requirements to passenger cars with a GVW of 2.5 tonnes or more, subject to agreement being reached in UN-ECE on the Phase II gtr.

Visit of Mr Zourek, DG Enterprise and Industry

The EBC Automobile Committee (Chairman, Mr Millington, ACEA Tokyo Office) gave a dinner for Mr Zourek on 30 November. He was left under no illusion that an FTA/EIA would lead to a substantial increase in European car imports. The Copenhagen Economics forecast, prepared for the Commission, which concluded that European car imports would increase by 84% by 2018 if NTMs were removed, was totally unrealistic.

The EBC Automobile Committee urged DG Enterprise to press Japan more forcibly on removing regulatory obstacles to imports. Mr Zourek suggested that pushing Japan too hard might put in danger cooperation with Japan in WP 29.

Trade Policy

On 6 November, the Japanese government adopted a Basic Policy on Comprehensive Economic Partnerships, which commits Japan "to open up the country and pioneer a new future" by promoting "high-level economic partnerships with major trading powers." The policy recognises however that, before entering into such partnerships, Japan must "first press ahead with fundamental domestic reforms, in order to strengthen its competitiveness."

High Level Group on the Internationalisation of Automotive Standards and Certification Procedures

MLIT held the first meeting on 26 November of a High Level Group, modelled on CARS 21, tasked with preparing by the end of FY2010 (31 March 2011) an Action Plan to enable Japan to take the lead in setting international standards for EVs and other new technologies and in developing an international certification system.

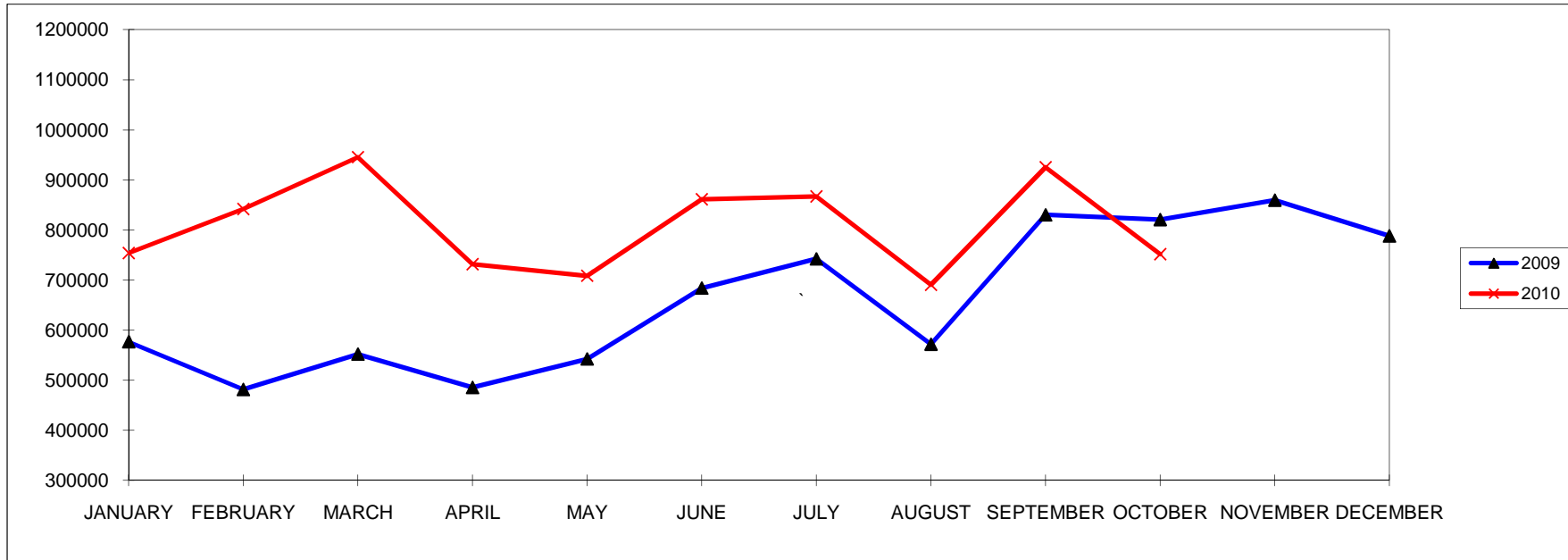
Market Data

The latest market statistics are attached.

ACEA Tokyo Office

6 December 2010

Japan: Automobile Production
October, 2010



	JANUARY	FEBRUARY	MARCH	APRIL	MAY	JUNE	JULY	AUGUST	SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER	TOTAL
2009	576.539	481.396	552.071	485.405	542.282	683.958	742.284	571.787	830.140	820.910	859.677	788.067	7.934.516
2010	753.773	841.796	945.271	731.794	708.453	861.045	866.762	690.689	924.963	751.620			8.076.166

	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	
Oct-10	387.650	152.466	104.849	644.965	42.494	17.929	37.358	97.781	607	8.267	8.874	751.620
Oct-09	386.549	221.079	106.737	714.365	41.576	20.056	36.065	97.697	818	7.981	8.799	820.861
10/09%	100,3	69,0	98,2	90,3	102,2	89,4	103,6	100,1	74,2	103,6	100,9	91,6

SOURCE : JAMA

JAPAN NEW AUTOMOBILE REGISTRATIONS: October, 2010

	This Month	10/ 09 %	Year to Date	10/ 09 %
Standard-Sized Cars	85.551	79,0	1.253.666	134,8
Imports	8.808	100,1	123.487	111,0
Small-Sized Cars	86.090	64,9	1.338.031	110,4
Imports	4.808	251,2	50.694	212,3
Mini Cars	79.852	81,0	1.122.183	102,8
Total Passenger Cars (a)	251.493	74,1	3.713.880	114,9
Imports (b)	13.616	127,1	174.181	128,9
Standard-Sized CV's	6.668	93,8	84.911	118,0
Imports	181	94,3	1.729	101,5
Small-Sized CV's	14.300	98,2	158.804	103,9
Imports	962	202,5	7.448	100,3
Mini-CV's	31.218	92,0	375.698	113,5
Total CV's (c)	52.186	93,8	619.413	111,5
Imports	1.143	171,4	9.177	100,5
Buses (d)	649	74,6	11.394	104,3
Imports		-		-
Total (excl. mini vehicles)	193.258	73,3	2.846.806	119,8
Total (incl. mini vehicles) (a + c + d)	304.328	76,8	4.344.687	114,3
Imports	14.766	129,6	183.454	127,2
Passenger Car Imports from Transplants (x)	3.359	669,1	24.827	369,8
Total Pure Passenger Cars Imports (b - x = y)	10.257	100,4	149.354	116,3
Pure Car Imports as Share of Total Passenger Car Market y/a %	4,1%		4,0%	

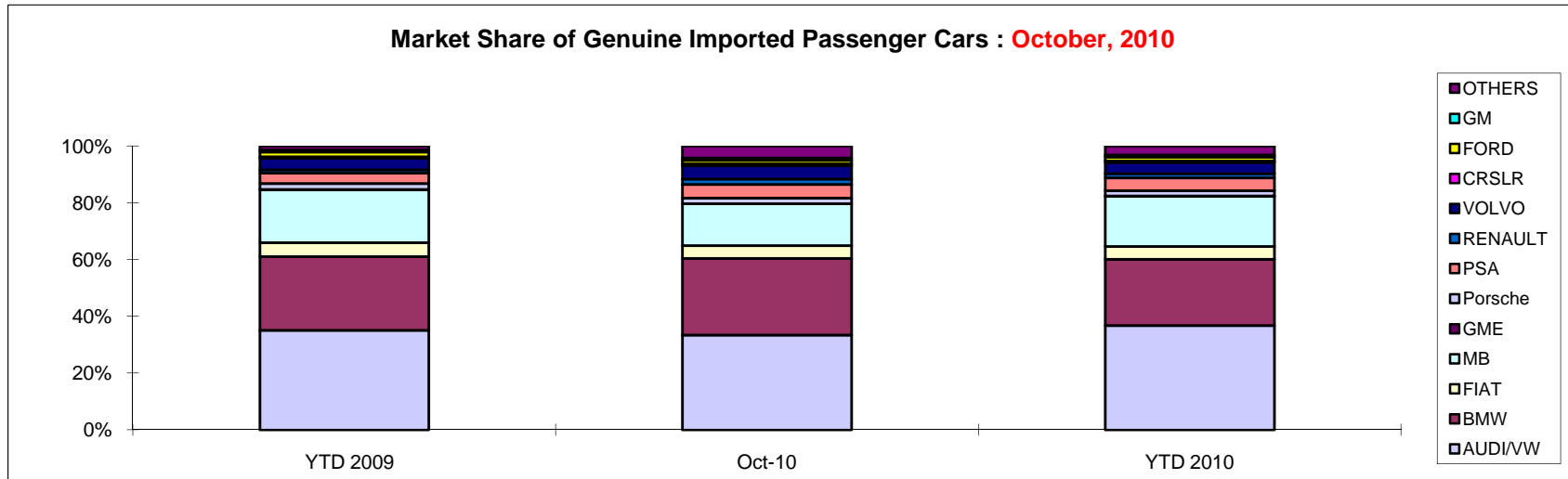
Source: JADA, JAIA

Note: 1) % figures : 2009 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.



Registrations

	AUDI/VW	BMW	FIAT	MB	GME	Porsche	PSA	RENAULT	VOLVO	CRSLR	FORD	GM	OTHERS	TOTAL
YTD 2009	54.276	40.093	7.567	28.836	186	3.214	5.762	1.755	6.213	877	2.525	1.238	2.047	153.161
Oct-10	3.427	2.771	462	1.510	0	207	498	191	485	59	128	92	427	10.257
YTD 2010	54.914	34.982	6.662	26.525	45	2.837	6.728	2.226	6.031	687	2.016	1.117	4.705	149.351

Market Share of Imported-Car Market

	AUDI/VW	BMW	FIAT	MB	GME	Porsche	PSA	RENAULT	VOLVO	CRSLR	FORD	GM	OTHERS	TOTAL
YTD 2009	35,40%	26,20%	4,90%	18,80%	0,10%	2,10%	3,80%	1,10%	4,10%	0,60%	1,60%	0,80%	1,30%	100,90%
Oct-10	33,40%	27,00%	4,50%	14,70%	0,00%	2,00%	4,90%	1,90%	4,70%	0,60%	1,20%	0,90%	4,20%	100,00%
YTD 2010	36,80%	23,40%	4,50%	17,80%	0,00%	1,90%	4,50%	1,50%	4,00%	0,50%	1,30%	0,70%	3,20%	100,10%

Audi/VW: Audi+VW+Bentley

BMW: BMW+BMW mini+Rolls Royce

Fiat: Fiat+Alfa Romeo+Ferrari+Maserati+Lancia

MB: Mercedes-Benz+smart

GME: Opel+Saab

PSA: Peugeot+Citroen

Ford: Ford

GM: Chevrolet+Cadillac+GMC+Buick+Saturn+Pontiac

Others: Dodge+Jeep+Hummer+Hyundai+Jaguar+Land+BMW AlpinaRover+Lotus+DAEWOOD+Lamborghini+Ssangyong+AstonMartin+Morgan+Autobianchi+Unimog

Source: JAIA

AUTOMOBILE EXPORTS BY REGION

October, 2010

Region	October			Year to Date		
	Units	Composition	10/09%	Units	Composition	10/09%
Asia	44.676	10,7%	111,1	459.989	11,7%	159,2
Middle East	41.717	10,0%	84,6	489.664	12,4%	152,9
EU	43.124	10,3%	92,3	460.687	11,7%	103,4
Europe	82.215	19,7%	140,6	757.500	19,2%	134,6
U.S.A	138.503	33,2%	104,0	1.226.913	31,2%	132,4
North America	157.934	37,9%	107,0	1.388.350	35,3%	130,0
Central America	18.110	4,3%	109,2	147.638	3,7%	156,9
South America	19.178	4,6%	151,1	175.833	4,5%	202,9
Africa	15.780	3,8%	114,0	155.928	4,0%	136,7
Oceania	37.098	8,9%	100,5	357.432	9,1%	127,3
Others	482	0,1%	78,0	6.118	0,2%	84,0
TOTAL	417.190	100,0%	110,9	3.938.182	100,0%	139,5

Source: JAMA

Automobile Exports by Value (Million Yen, %)
October, 2010

		US		EU		ASIA		TOTAL	
		VALUE	% Rate of Increase '10/'09	VALUE	% Rate of Increase '10/'09	VALUE	% Rate of Increase '10/'09	VALUE	% Rate of Increase '10/'09
Automobiles (8701.10-9, 8701.20, 8701.90.9, 8702/8706)	This month	248.379	3,2%	79.427	-2,4%	112.805	16,7%	782.537	10,2%
	YTD	2.314.765	33,0%	824.029	11,0%	1.141.285	66,5%	7.541.590	45,2%
Passenger Cars (8703.21/8703.90)	This month	242.685	2,0%	76.356	-2,9%	78.936	13,2%	677.585	10,2%
	YTD	2.277.294	32,2%	797.741	9,8%	788.587	66,0%	6.486.880	44,4%
Buses/Trucks (8702, 8703.10, 8704/8705)	This month	5.659	113,2%	3.071	14,3%	27.492	18,7%	97.310	9,1%
	YTD	36.914	120,9%	26.297	64,8%	264.645	48,4%	976.453	49,8%

#: change over June 2010

Source: Ministry of Finance

Note : Total = Global Exports