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More American Than Ever

Annual Contributions Report
2014-2015

JAMA



Table of Contents

- 2 Introduction – JAMA in America: More American Than Ever
- 3-4 Auto Production, Investment, and R&D Support
U.S. Economic Growth: Map of U.S. Facilities
- 5 More American Jobs: Employment in the U.S.
- 6 More Record Highs: Japanese-Brand Sales in the U.S. and U.S. Parts Purchases
- 7-8 More American Exports: Exports from U.S. Plants
- 9-10 Alternative-Powered Vehicles and New Environmental and Energy-Efficient Technologies
- 11 Social Contributions and Community Involvement
- 12 R&D and Design Centers Data
- 13-14 Japanese Automakers' U.S. Production, Employment, and Investment Data



JAMA in America: More American Than Ever



For the 82,816 employees who work directly for the Japan Automobile Manufacturers Association (JAMA) member companies' U.S. manufacturing plants, distributors, and R&D/design centers, their employers are as American as can be. The same goes for the 319,568 employees who work for our U.S. dealership network and, likewise, for the 961,000 people who work in intermediate and spin-off jobs supported by us and our dealers in the U.S. That's because the approximately 1.36 million people who rely on these jobs to help them provide for their families and plan for their future know that Japanese automakers are an integral part of the U.S. automobile industry and the American economy as a whole.

When 71 percent of Japanese-brand vehicles sold in the United States are made in North America (the majority of them in the U.S. itself) and when Japanese automakers' U.S. parts purchases continue to increase —reaching a record high of \$57 billion in 2013 — it is irrefutable that the more than \$40 billion that these companies have invested in America continues to promote U.S. economic recovery and the revival of this nation's manufacturing sector. In a further indication of our members' commitment to U.S. economic growth, our exports of vehicles from the U.S. have increased by 129 percent from 2009 to 2013.

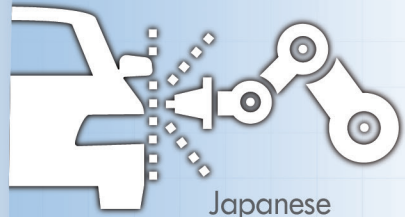
Japanese automakers in the U.S. contribute to Americans' quality of life in other ways, as well. You can clearly see our dedication to helping guide America on the path to a cleaner environment through our development and sales of alternative-powered vehicles. In fact, 81 percent of alternative-powered vehicles on U.S. roads today are Japanese-brand cars and trucks. Our member companies also are deeply engaged in the many communities in which we research, design, and build millions of vehicles, engines, and parts. Every year, our members and their employees provide significant financial contributions and volunteer hours in support of community programs that focus on safety, educational development, environmental stewardship, and humanitarian relief.

The proof is in the pudding — Japanese automakers are here to stay, and we continue to expand our efforts across the country. As you read through this U.S. economic contributions report, remember that in just over three decades, Japanese automakers have gone from employing zero workers in the U.S. to supporting more than 1.36 million jobs, making these companies more American than ever.

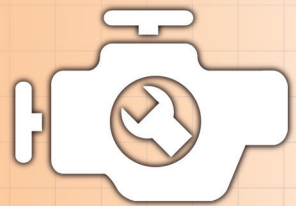
Ron Bookbinder

Ron Bookbinder
General Director, JAMA USA

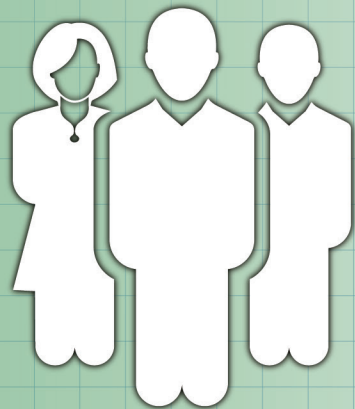
Auto Production, Investment, and R&D Support U.S. Economic Growth



Japanese automakers operate **26** manufacturing plants.

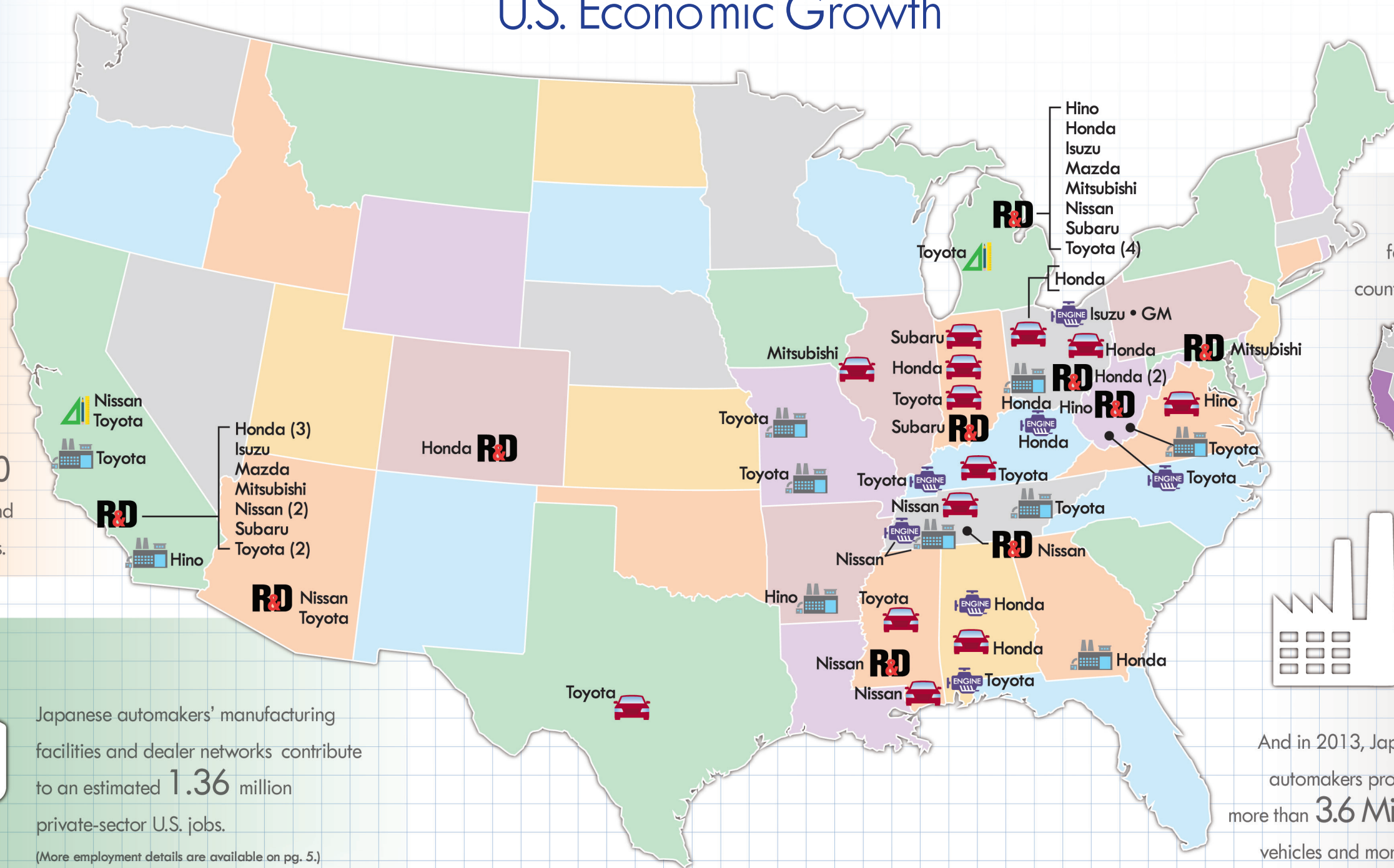


Japanese automakers directly employ more than **82,000** manufacturing, distribution, and R&D/design center employees.

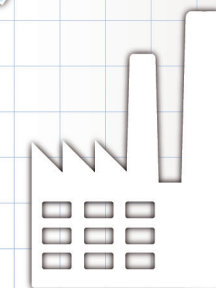
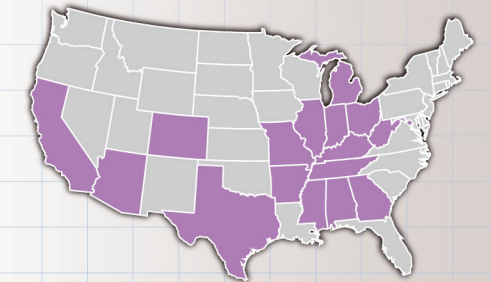


Japanese automakers' manufacturing facilities and dealer networks contribute to an estimated **1.36 million** private-sector U.S. jobs.

(More employment details are available on pg. 5.)



Japanese automakers have facilities in **16** states across the country and the District of Columbia.



Their manufacturing plants have cumulatively invested more than **\$40 Billion** in the U.S. economy.

And in 2013, Japanese automakers produced more than **3.6 Million** vehicles and more than **4 Million** engines.

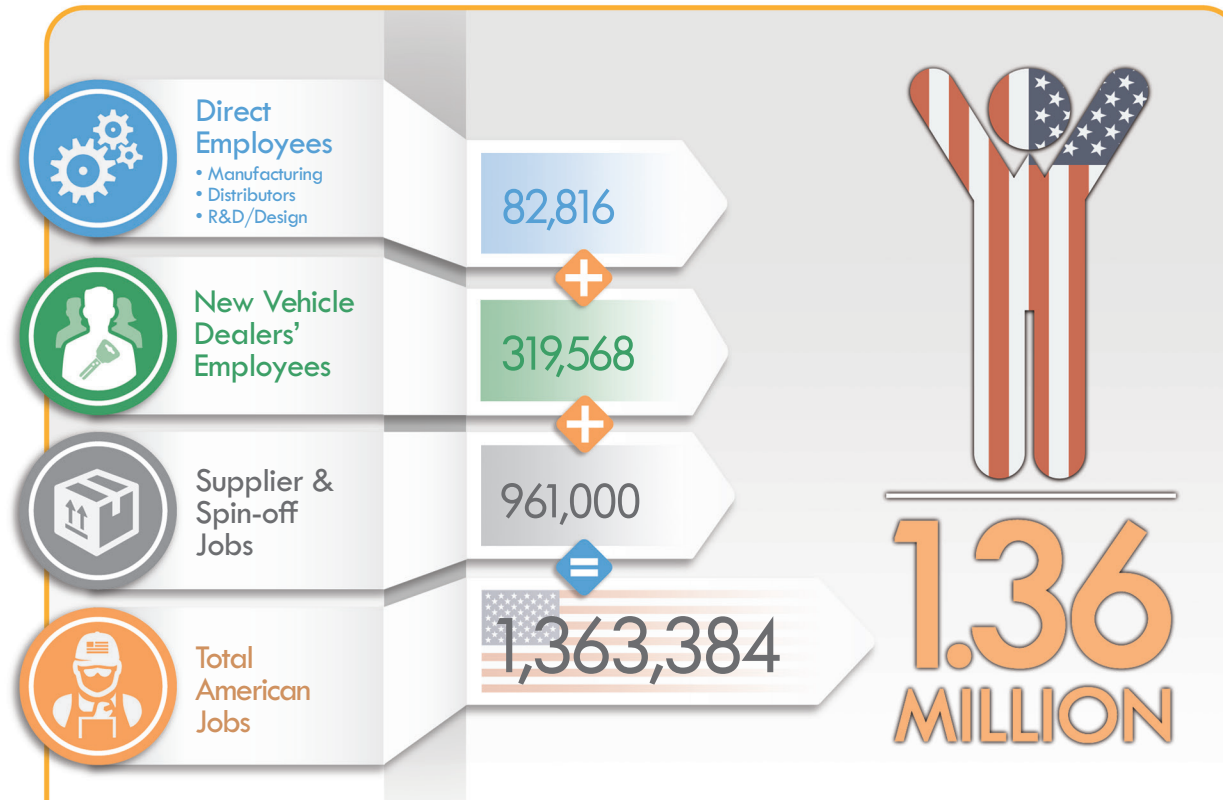


Source: Japanese Automakers



More American Jobs

Japanese automakers and their dealer networks employ more than 402,000 Americans. They also generate approximately 328,000 U.S. jobs through purchases of auto parts and supplies, while their employees support an additional 633,000 "spin-off" jobs across the country by buying goods and services from local businesses. All told, Japanese automakers contribute to an estimated 1.36 million American jobs.



Employment (Number of Employees in 2013)

	Automakers	New Vehicle Dealers	Total
Manufacturing	59,494		
R&D	4,479		
Distributors	18,843		
Subtotal (Direct Employees)	82,816	319,568	402,384
Suppliers (Intermediate)	224,000	104,000	328,000
Spin-off	393,000	240,000	633,000
Grand Total	699,816	663,568	1,363,384

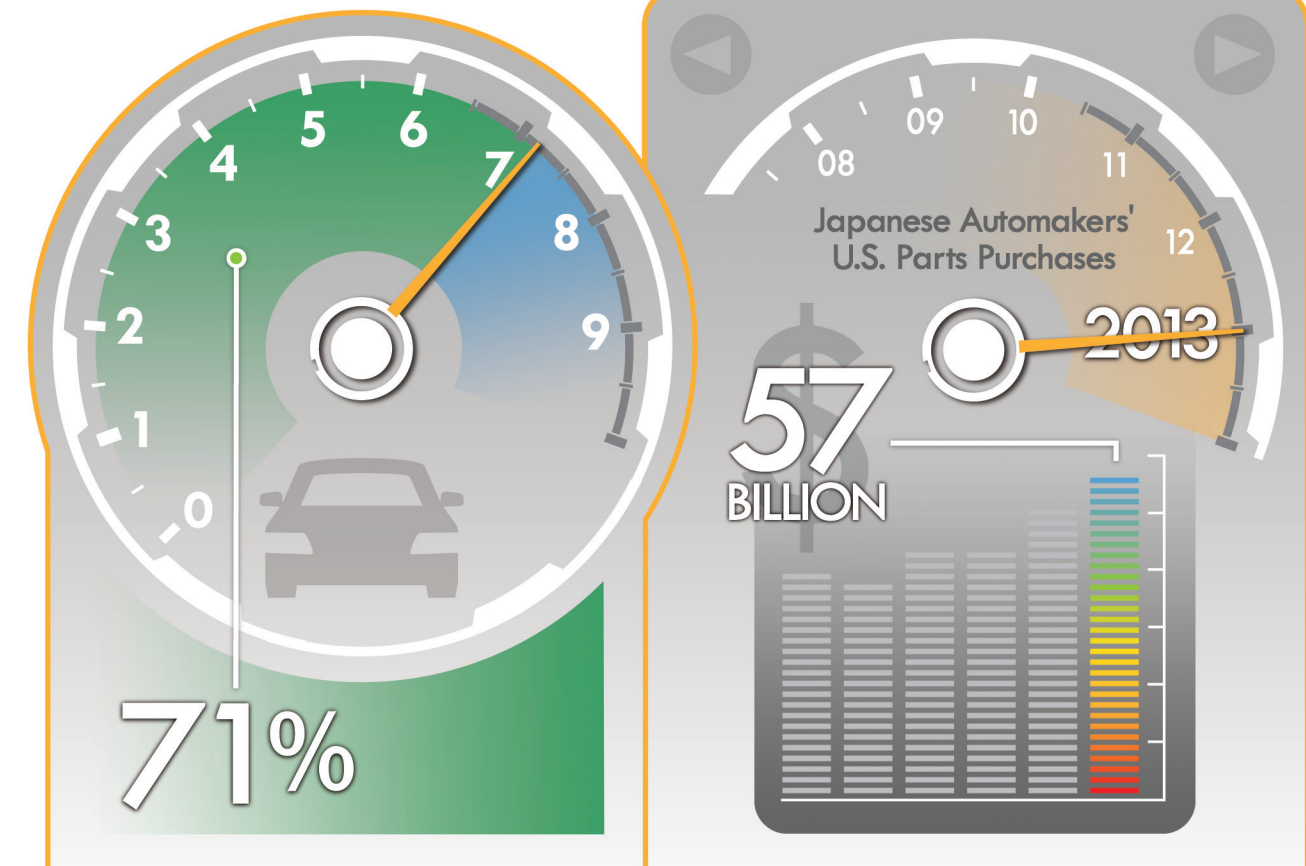
Source: Japanese Automakers/Professor Thomas Prusa, Rutgers University

Note: Supplier and spin-off employment are estimates.

More Record Highs

A Record High 71% of Japanese-Brand Vehicles in the U.S. are Built in North America

Japanese Automakers Purchased a Record High \$57 Billion in U.S. Parts in 2013

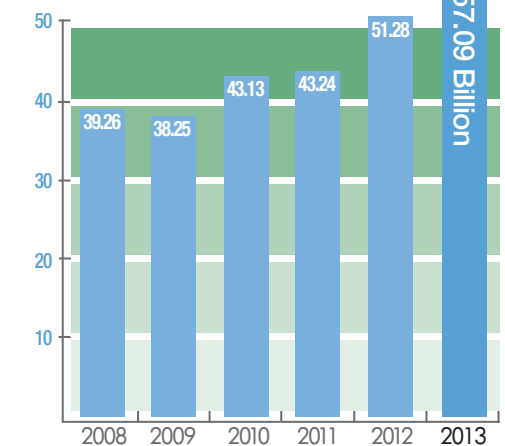


Japanese-Brand Sales in the U.S. (Vehicles)

Year	Total Sales	Domestically Built	Imported	% Domestic
2008	5,238,873	3,240,634	1,998,239	62%
2009	4,209,768	2,764,228	1,445,540	66%
2010	4,477,398	3,066,401	1,410,997	68%
2011	4,459,373	3,025,222	1,434,151	68%
2012	5,346,150	3,744,016	1,602,134	70%
2013	5,790,117	4,098,498	1,691,619	71%

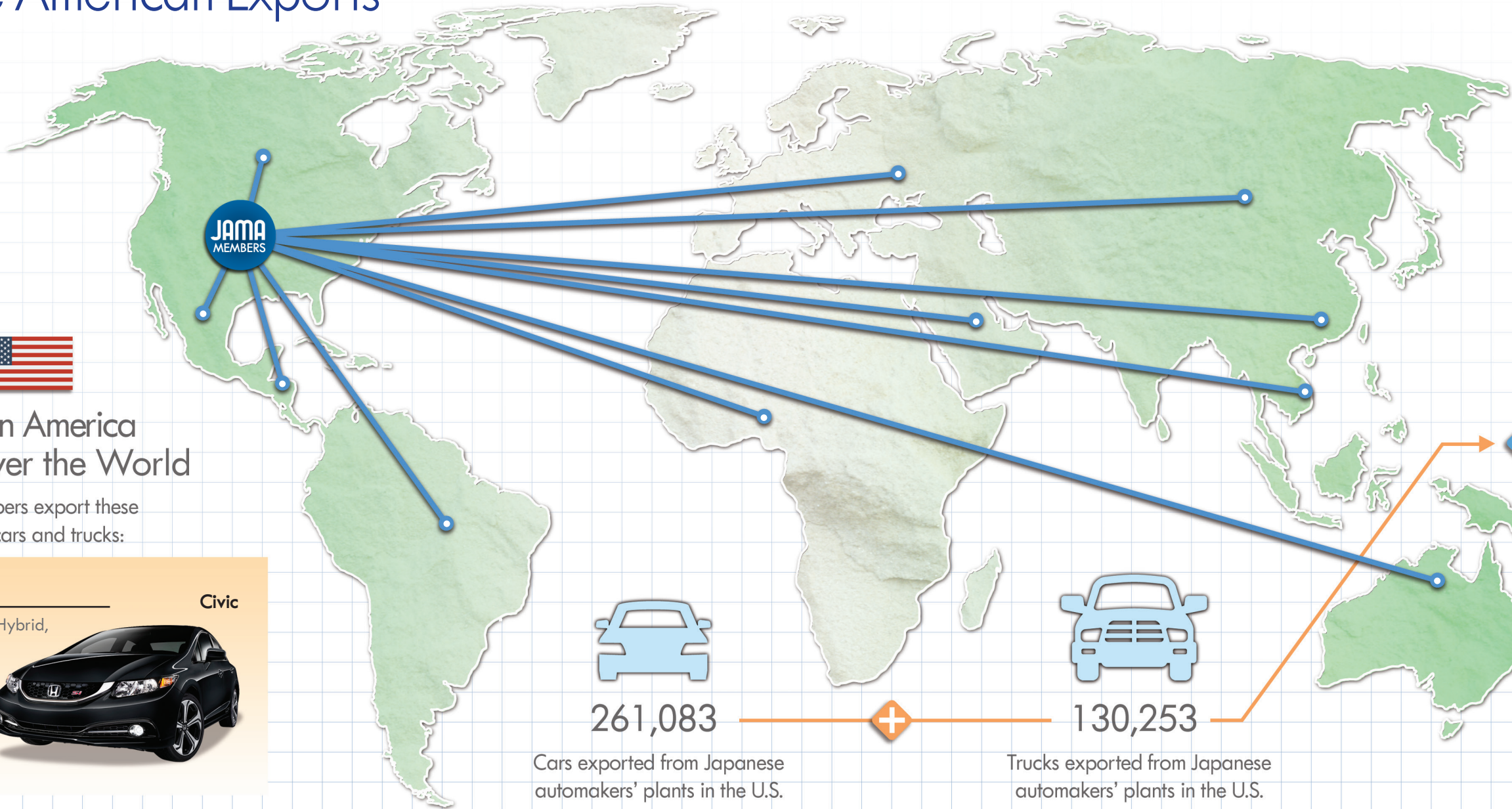
Source: Ward's Automotive Reports Note: Industry statistical sources record vehicles built in the North American Free Trade Agreement (NAFTA) region as domestic U.S. sales. Historical data is available at <http://jama.org/japan-auto-industry-data/trends/>

U.S. Parts Purchases (\$ Billion)



Source: Japanese Automakers Note: Data includes purchases of U.S. auto parts by JAMA members for vehicles built in both the U.S. and Japan.

More American Exports



Japanese-brand auto exports from the U.S. grew **129%** from 2009 to 2013.

391,336 Total Japanese-brand vehicle exports from the U.S. in 2013



Source: Japanese Automakers

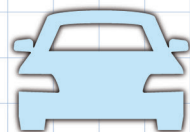
Made in America Sold All Over the World

JAMA members export these U.S.-made cars and trucks:

HONDA

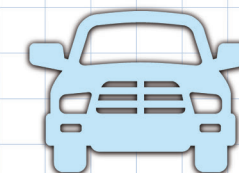
Civic

- Accord • Acura (ILX, ILX Hybrid, MDX, RDX, TL) • Civic
- Crosstour • CR-V
- Odyssey • Pilot
- Ridgeline



261,083

Cars exported from Japanese automakers' plants in the U.S.



130,253

Trucks exported from Japanese automakers' plants in the U.S.

NISSAN

Rogue

- Altima • Altima Hybrid
- Armada • Frontier
- Infiniti QX60 • LEAF
- Maxima • NV
- Pathfinder • Rogue
- Sentra • Titan • Xterra



MITSUBISHI

Outlander Sport

Outlander Sport



SUBARU

Outback

Legacy • Outback



TOYOTA

Corolla

- Avalon • Camry • Corolla
- Highlander • Sequoia
- Sienna • Tacoma
- Tundra • Venza



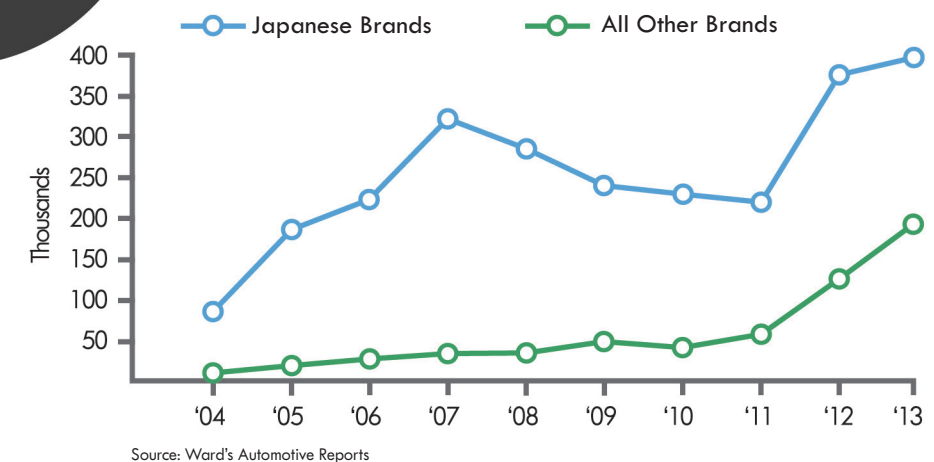
Alternative-Powered Vehicles and New Environmental/Energy-Efficient Technologies



81%
of alternative-powered vehicles on U.S. roads today are Japanese brands.

Japanese automakers are at the leading edge of developing environmentally friendly and energy-efficient automotive technologies and producing high-quality alternative-powered vehicles.
(See related chart on pg.10)

U.S. Sales of Alternative-Powered Vehicles



Social Contributions and Community Involvement

Japanese automakers are dedicated to improving the lives of Americans across the country. They encourage volunteer service and provide financial support to community programs that focus on safety, educational development, environmental stewardship, and humanitarian relief.



HINO - Firefighter Fundraiser for Megan's Wings



HONDA - MLK Day of Service



MAZDA - Drive for Good Event



MITSUBISHI - Donation of Outlander Sport to Operation Cool



SUBARU - Food Preparation for Senior Citizens



TOYOTA - Partner, 2015 Special Olympics World Games



NISSAN - Habitat for Humanity Team

R&D and Design Centers Meet American Consumers' Requirements

Given the vast differences between Japanese and American vehicle markets, many of the products that JAMA members sell in the U.S. are designed and built in America. JAMA members' R&D centers are responsible for tracking consumer trends and developing products that satisfy American preferences and needs.

Name of Company	Headquarters, Division Offices	Current Functions
Hino Motors Manufacturing, U.S.A., Inc.	Farmington Hills, MI; Williamstown, WV	1, 5, 8
Honda R&D Americas, Inc.	Torrance, Los Angeles & Mountain View, CA; Raymond & Columbus, OH; Detroit, MI; Denver, CO	1, 2, 3, 4, 5, 6, 7
Isuzu Manufacturing Services of America, Inc.	Plymouth, MI; Garden Grove, CA	1, 2, 3, 5, 6, 7, 8
Mazda North American Operations, Inc.	Irvine, CA; Wixom, MI	1, 2, 3, 4, 5, 6, 7
Mitsubishi Motors R&D of America, Inc.	Ann Arbor, MI; Washington, DC; Cypress, CA	1, 2, 3, 8
Nissan Technical Center North America, Inc.	Farmington Hills, MI; Sacramento & Sunnyvale, CA; Canton, MS; Smyrna, TN	1, 2, 3, 5, 6, 7,
Nissan Design America, Inc.	San Diego, CA	4
Nissan Technical Center North America, Inc. Arizona Test Center	Stanfield, AZ	3
Subaru Research and Development, Inc.	Cypress, CA; Lafayette, IN; Ann Arbor, MI	1, 2, 3, 4, 6, 8
Toyota Technical Center	Ann Arbor, Livonia, Plymouth & Saline, MI; Wittmann, AZ; Gardena & Sacramento, CA	1, 2, 3, 4, 5, 6, 7
Caltex Design Research, Inc. (Toyota)	Newport Beach, CA; Ann Arbor, MI	4

Key to Current Functions	1) Technical support for procurement of parts for local production	2) Evaluation of parts	3) Evaluation of vehicles	4) Styling & general design	5) Parts design	6) Vehicle design	7) Prototype production	8) Technical support & marketing research
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Source: Japanese Automakers / All data as of December 2013

Japanese Automakers' Production, Employment, and Investment In the U.S.

	Name of Company	Location	Products	Units Produced in 2013	Production Capacity	Employees	Total Investment (\$ million)
Subaru	Subaru of Indiana Automotive, Inc.	Lafayette, IN	Legacy, Outback & Tribeca	266,166	310,000	3,705	1,411
			Toyota: Camry				
Isuzu	DMAX, Ltd.	Moraine, OH (Joint Venture: GM)	Diesel Engines	94,586	200,000	505	539
Honda	Honda of America Manufacturing, Inc.	Marysville, East Liberty & Anna, OH	Accord Sedan & Coupe, Crosstour, CR-V, Acura TL & Acura RDX	734,772	680,000	10,000	7,900
			Engines	1,114,549	1,180,000		
	Honda Transmission Manufacturing of America, Inc.	Russells Point, OH	Automatic Transmissions	1,245,895	1,000,000	1,125	676
			Power Train Parts	547,302	638,000		
	Honda Manufacturing of Alabama, LLC	Lincoln, AL	Odyssey, Pilot & Ridgeline	333,556	340,000	4,200	2,000
			Engines	333,556	340,000		
	Honda Precision Parts of Georgia, LLC	Tallapoosa, GA	Automatic Transmissions	345,169	375,000	500	232
	Honda Manufacturing of Indiana, LLC	Greensburg, IN	Civic, Civic CNG, Acura ILX & ILX Hybrid	241,589	250,000	2,300	800
Mitsubishi	Mitsubishi Motors North America, Inc.	Normal, IL	Outlander Sport	67,475	70,000	1,281	1,785
Nissan	Nissan North America, Inc.	Smyrna, TN	LEAF, Altima, Maxima, Pathfinder, Infiniti QX60 & Rogue	484,140	550,000	7,000	5,800
			Lithium-Ion Batteries	n/a	n/a		
		Decherd, TN	Engines	781,013	1,400,000	1,500	1,000
		Canton, MS	Altima, Frontier, Xterra, Titan, Armada, LCV-Van LCV-Passenger, NV Cargo & Sentra	308,113	450,000	5,600	2,600

	Name of Company	Location	Products	Units Produced in 2013	Production Capacity	Employees	Total Investment (\$ million)
Toyota	TABC, Inc. (TABC)	Long Beach, CA	Catalytic Converters	26,330	2,100,000	486	270
			Steering Columns	170,623	210,000		
			Stamping Parts	11,254,545	24,000,000		
			Sub-assemblies	3,975,633	4,600,000		
			Front Arms	698,536	880,000		
	Toyota Motor Mfg., Kentucky, Inc. (TMMK)	Georgetown, KY	Camry, Camry Hybrid, Avalon, Avalon Hybrid & Venza	504,213	500,000	7,814	5,865
			Engines	546,583	540,000		
	Bodine Aluminum, Inc. (BODINE)	St. Louis & Troy, MO Jackson, TN	Cylinder Heads	1,833,544	n/a	1,025	603
			Engine Brackets	477,860	n/a		
			Cylinder Blocks	1,978,877	n/a		
			Transmission Cases & Housings	726,968	n/a		
	Toyota Motor Mfg., West Virginia, Inc. (TMMWV)	Buffalo, WV	Engines	628,865	653,000	1,245	1,087
			Transmissions	503,994	52,000		
	Toyota Motor Mfg., Indiana, Inc. (TMMI)	Princeton, IN	Sienna, Highlander & Sequoia	299,820	365,000	5,026	3,919
Toyota Motor Mfg., Alabama, Inc. (TMMAL)	Huntsville, AL	Engines	539,991	506,000	1,036	663	
Toyota Motor Mfg., Texas, Inc. (TMMTX)	San Antonio, TX	Tundra & Tacoma	228,983	200,000	2,883	2,275	
		Engines	158,647	150,000			
Toyota Motor Mfg., Mississippi, Inc. (TMMMS)	Blue Springs, MS	Corolla	158,647	150,000	1,559	871	
Hino	Hino Motors Mfg., U.S.A., Inc. (CA Plant)	Ontario, CA	Vehicle Components for Toyota Vehicles	171,000	180,000	203	57
	Hino Motors Mfg., U.S.A., Inc. (AR Plant)	Marion, AR	Differential, Rear Axle & Suspension-Related Parts for Toyota Vehicles	134,000	275,000	322	222
	Hino Motors Mfg., U.S.A., Inc. (WV Plant)	Williamstown, WV	Class 6-7 Commercial Vehicles	7,400	10,000	179	30
Total	Vehicles 2013			3,634,874	3,875,000	59,494	40,605
	Engines 2013			4,039,143	4,819,000		

Source: Japanese Automakers; all data as of December 2013