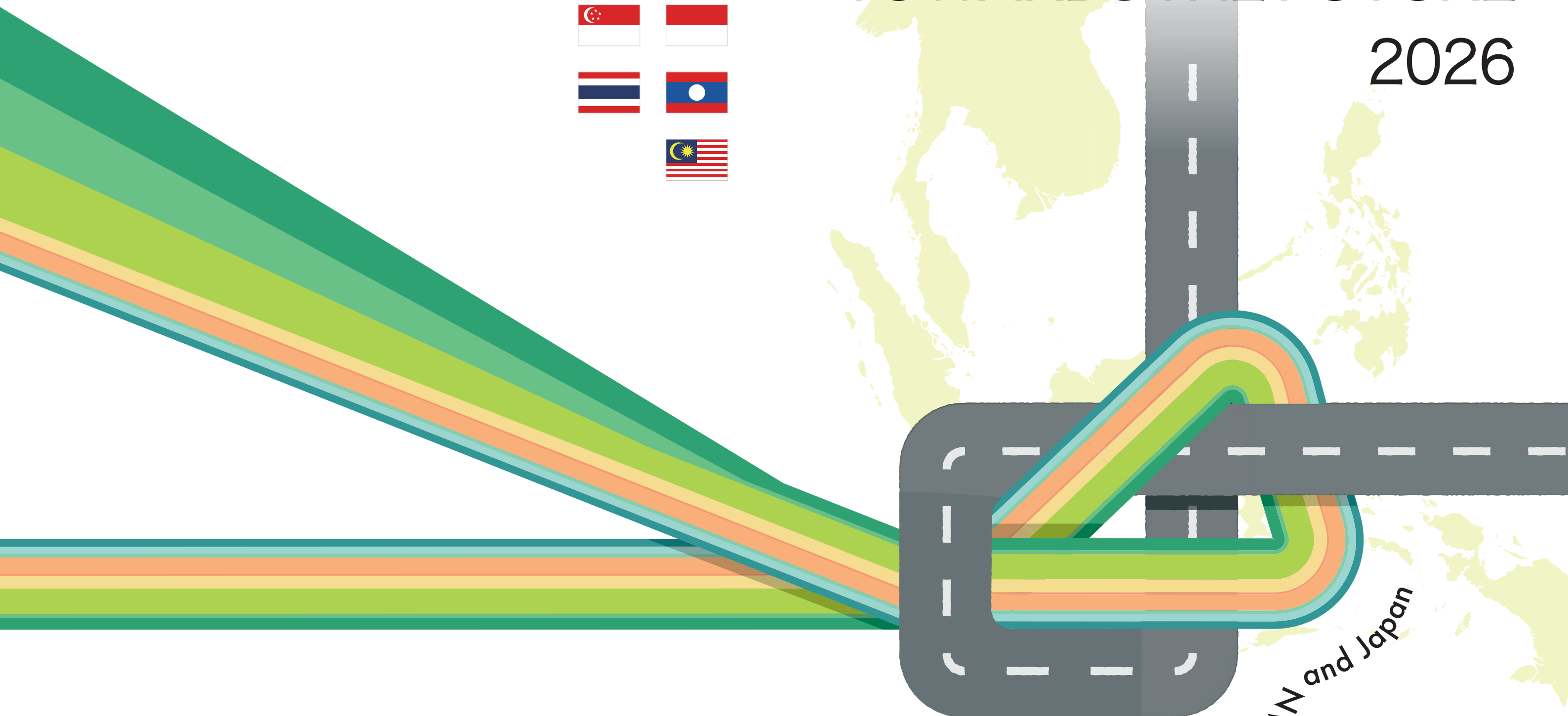




DRIVING GROWTH TOWARDS THE FUTURE 2026



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Hand-in-Hand between

ASEAN and Japan

jama
Japan Automobile Manufacturers Association

For more than half a century, Japanese automobile manufacturers have been working hand in hand with public and private stakeholders in ASEAN countries to help build the automotive industry in the region. The scope of these co-creation initiatives goes far beyond vehicle assembly, extending not only to the development of supporting industries including parts manufacturing, but also to broad-based human resource development and technology transfer encompassing related industries.

From affordable small cars that serve as essential transportation for the public to multi-purpose vehicles supporting family mobility, light-duty commercial vehicles supporting small and medium-sized enterprises, pickup trucks supporting agriculture, forestry and fisheries, and heavy-duty trucks and buses supporting logistics and passenger movement, Japanese automobile manufacturers will continue to provide a full lineup of products tailored to the diverse national conditions and customer needs in the ASEAN countries, ensuring that no one is left behind.

Together over the decades, ASEAN and Japan have overcome various challenges, not least the Asian financial crisis, to achieve major advances in the ASEAN automotive industry. The multiple new challenges facing the global industry today, including digital transformation (DX) and green transformation (GX), are considerable, but we believe that through cooperation between the public and private sectors in ASEAN and Japan built on our longstanding mutual trust, we can meet the challenges involved in the transition to a sustainable and vibrant mobility-based

Introduction

society. Looking towards the half-century ahead of us, JAMA is more committed than ever to contributing to the creation of a bright future.

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This brochure is based on publicly available data from JAMA member companies.

Isuzu Commercial Truck Operating at a Mining Site



Nissan New KICKS e-POWER Launch Event



MITSUBISHI XFORCE HEV 1st Batch Delivery Ceremony in Thailand



Production Facilities in ASEAN in 2025 & Related Data by Country

ASEAN



Myanmar

	Production (Units)	Sales (Units)	Export (Units)		Employment (Employees)
			Intra ASEAN	Ext ASEAN	
CY2025	3,865	4,433	-	-	277



Vietnam

	Production (Units)	Sales (Units)	Export (Units)		Employment (Employees)
			Intra ASEAN	Ext ASEAN	
CY2025	83,412	203,287	-	-	2,876



Thailand

	Production (Units)	Sales (Units)	Export (Units)		Employment (Employees)
			Intra ASEAN	Ext ASEAN	
CY2025	1,014,906	431,943	187,496	539,939	44,809



Cambodia

	Production (Units)	Sales (Units)	Export (Units)		Employment (Employees)
			Intra ASEAN	Ext ASEAN	
CY2025	3,348	6,126	-	-	141



Singapore

	Production (Units)	Sales (Units)	Export (Units)		Employment (Employees)
			Intra ASEAN	Ext ASEAN	
CY2025	-	14,239	-	-	356

Employees
98,237 (2025)

Exports
1.18 Million units (2025)

Production
2.79 Million units (2025)

Sales
2.29 Million units (2025)



The Philippines

	Production (Units)	Sales (Units)	Export (Units)		Employment (Employees)
			Intra ASEAN	Ext ASEAN	
CY2025	107,612	396,722	-	-	9,337



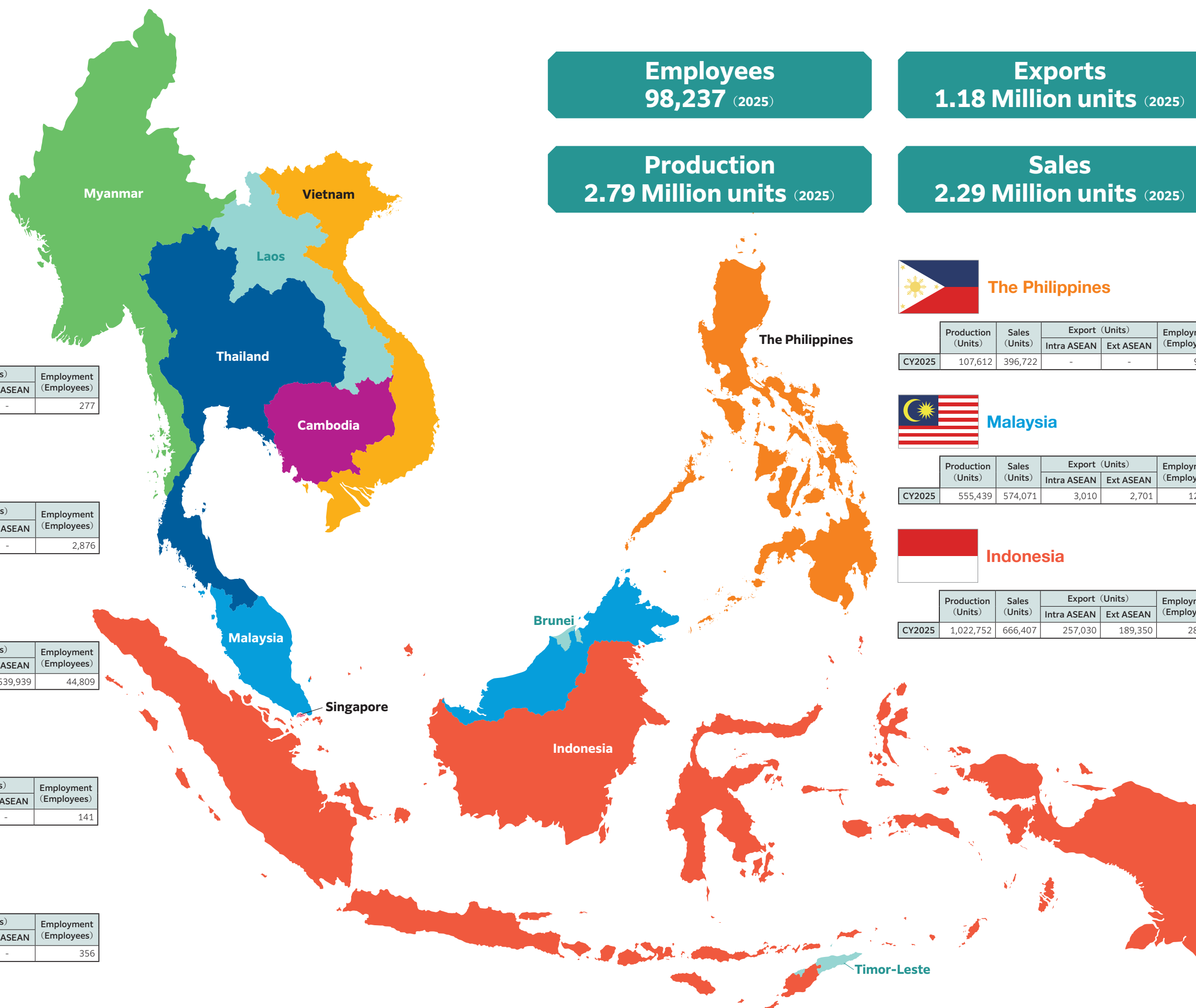
Malaysia

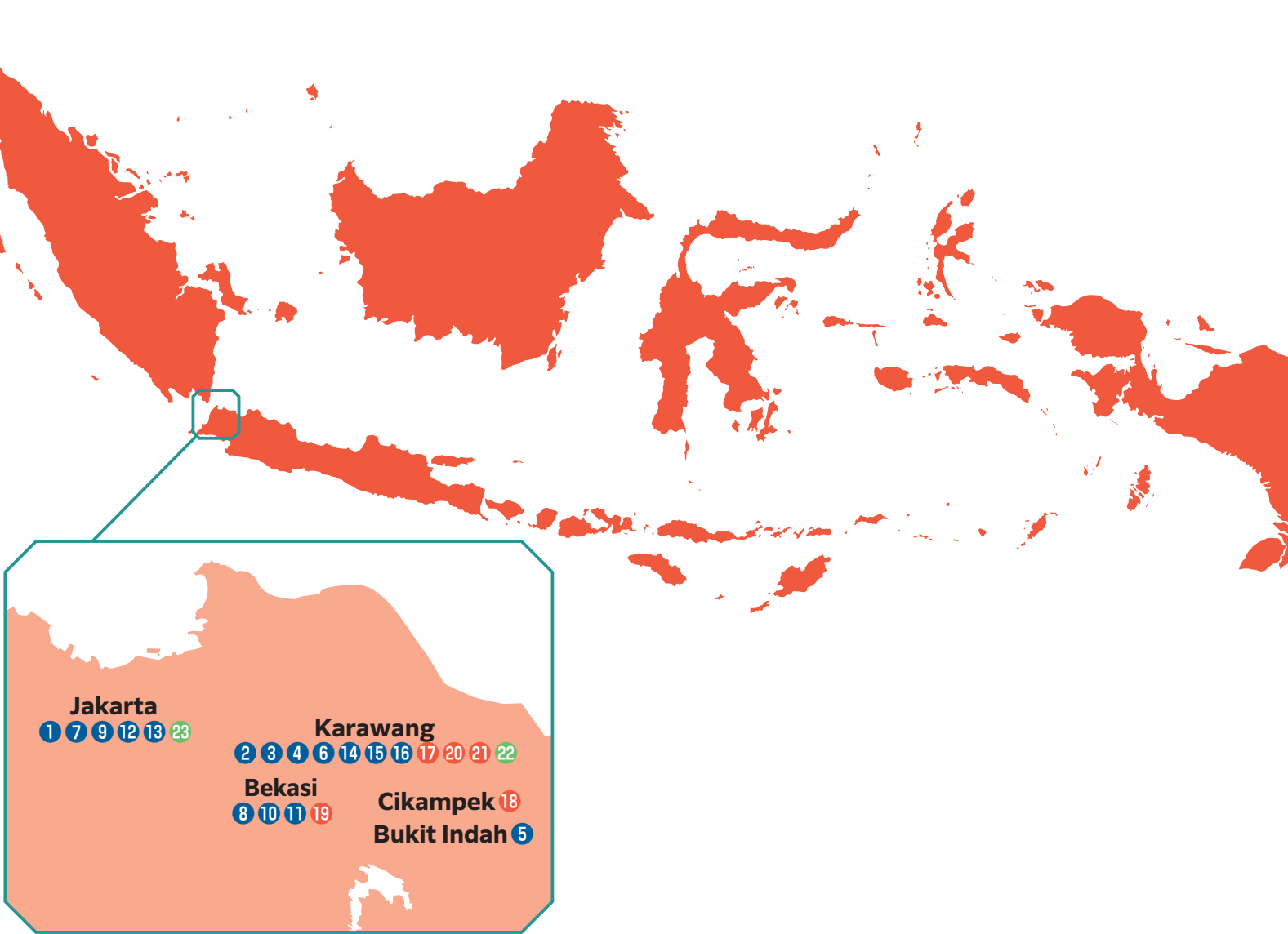
	Production (Units)	Sales (Units)	Export (Units)		Employment (Employees)
			Intra ASEAN	Ext ASEAN	
CY2025	555,439	574,071	3,010	2,701	12,267



Indonesia

	Production (Units)	Sales (Units)	Export (Units)		Employment (Employees)
			Intra ASEAN	Ext ASEAN	
CY2025	1,022,752	666,407	257,030	189,350	28,174





PT Astra Daihatsu Motor Karawang Assembly Plant 2



●AUTOMOBILE PRODUCTION COMPANIES

Location/Number	Manufacturer	Company Name/facility name		Est.	Capitalization (x 1 million)	Equity Stake	Products	Employees (2025)
1	Daihatsu	PT Astra Daihatsu Motor	Sunter Assembly Plant	Jan.1992	IDR 894,370	61.75%	Terios, GranMax, Luxio	8,867
2			Karawang Assembly Plant	Oct.2012			Rush, TownAce, LiteAce ^{*1}	
3			Karawang Assembly Plant 2	Dec.2024			Bongo ^{*2}	
4			Karawang Engine Plant	Nov.2006			Sigra, Rocky	
5	Hino	PT. Hino Motors Manufacturing Indonesia		Dec.1982	USD 112.5	90%	Trucks & Buses	1,536
6	Honda	P.T. Honda Prospect Motor	Karawang	Jan.2014	USD 70	51%	Brio RS, Brio Satya, BR-V, WR-V, HR-V	-
7	Isuzu	P.T. Isuzu Astra Motor Indonesia		Apr.2008	IDR1,092,000	50%	Medium Duty Trucks, Light Duty Trucks, Small-Sized Buses, Panther Wagon and Trucks	1,146
8	Mitsubishi	PT Mitsubishi Motors Krama Yudha Indonesia		Feb.2015	IDR2,200,000	60%	Xpander, Pajero Sport, Xforce, Xforce HEV, L300, Destinator	3,759
9	Mitsubishi Fuso	P.T.Krama Yudha Tiga Berlian Motors		Jul.1970			Canter, eCanter, Fighter X	-
10	Suzuki	PT Suzuki Indomobil Motor	Tambun Plant	Jan.1991	IDR 632,096	94.9%	Motorcycle / Automobile	1,686
11			Cikarang Plant	Jan.2015			Automobile	1,667
12	Toyota	PT. Toyota Motor Manufacturing Indonesia	Sunter I	Aug.1973	IDR 23,736	95%	Engines	7,936
13			Sunter II	May.1977			Stamping Parts / Dies, Aluminum Casting	
14			Karawang I	Mar.1998			Fortuner, Innova, Innova Zenix, bZ4X	
15			Karawang II	Mar.2013			Avanza, Yaris, Yaris Cross, Veloz	
16			Karawang III	Feb.2016			Engines	

●COMPONENTS MANUFACTURING COMPANIES

Location/Number	Manufacturer	Company Name	Est.	Capitalization (x 1 million)	Equity Stake	Products	Employees (2025)
17	Daihatsu	PT Daihatsu Drivetrain Manufacturing Indonesia	Feb.2021	IDR 635,100	100%	Transmissions (CVT)	262
18	Honda	P.T. Honda Precision Parts Manufacturing Ltd.	Jul.2002	USD 150	95%	Transmissions and Engine Valves	-
19	Isuzu	P. T. Mesin Isuzu Indonesia	Feb.1983	IDR 13,200	36.7% ^{*3}	Diesel Engines and Related Parts	347
20		P. T. Asian Isuzu Casting Center	Apr.1997	USD 74.3	8.4% ^{*4}	Casting Parts	618
21		P. T. TJForge Indonesia	Mar.2013	IDR 1,500,000	35.5% ^{*5}	Forging, Processing and Assembly of Automobile Parts	350

●R&D & OTHER OPERATIONS

Location/Number	Manufacturer	Company Name	Est.	Capitalization (x 1 million)	Equity Stake	Functions	Employees (2025)
22	Daihatsu	PT Astra Daihatsu Motor Research & Development Center	Apr.2013	-	-	Research & Development	8,867 ^{*6}
23	Honda	PT. Honda R&D Indonesia	Nov.2012	-	-	Research & Development	-

Chart based on publicly available data from JAMA member companies

(*1)Toyota brand models
(*2)Mazda brand model
(*3)Isuzu Motors Limited 36.7%, PT Isuzu Astra Motor Indonesia 33.7%, Isuzu Motors Asia 29.6%
(*4)JTT 51%, Isuzu Motors Asia 40.6%, Isuzu Motors Limited 8.4%
(*5)JTT 49.5%, Isuzu Motors Limited 35.5%, Isuzu Motors Asia 15%
(*6)R&D employees are included in PT Astra Daihatsu Motor.



MITSUBISHI TRITON Powering Indonesia's Palm Plantations

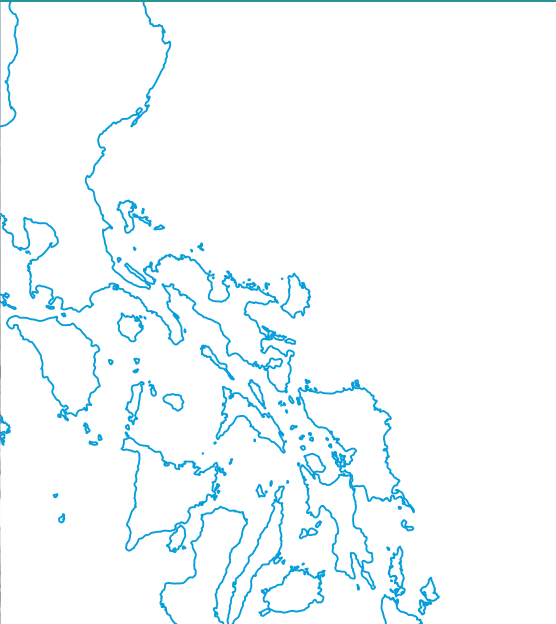
Vehicle Loading Operations at Patimban Port, Indonesia



Development by Malaysian Engineers for Local Needs



Perodua Global Manufacturing Sdn.Bhd.



Urban Traffic Scene



●AUTOMOBILE PRODUCTION COMPANIES

Location/Number	Manufacturer	Company Name/facility name		Est.	Capitalization (x 1 million)	Equity Stake	Products	Employees (2025)
1	Daihatsu	Perodua Manufacturing Sdn. Bhd.		Nov.1993	RM 574	0% ^{*1}	Myvi, Alza, Aruz,Traz Veloz ^{*2}	4,629
2		Perodua Global Manufacturing Sdn. Bhd.		Feb.2013	RM 200	0% ^{*1}	Axia, Bezza, Ativa	2,746
3	Hino	Hino Motors Manufacturing (Malaysia) Sdn. Bhd.		Oct.2012	RM 78.7	80%	Trucks and Buses	310
4	Honda	Honda Malaysia Sdn. Bhd.	Melaka	Nov.2000	RM 170	51%	City, Civic, CR-V, City Hatchback, HR-V, WR-V	-
5	Isuzu	Isuzu Hicom Malaysia Sdn. Bhd.		Jul.1996	RM 100	0% ^{*3}	Medium Duty Trucks, Light Duty Trucks, Small-Sized Buses	504
6	Mazda	Mazda Malaysia Sdn. Bhd.		2012	RM 85	70%	CX-30, CX-5, CX-8	112
7	Mitsubishi	Mitsubishi Motors Malaysia Sdn. Bhd.		Oct.2019	RM 20	60%	Xpander, Xforce	180
8	Mitsubishi Fuso	Hap Seng Trucks Distribution Sdn. Bhd.	HICOM Automotive Manufacturers (Malaysia) Sdn. Bhd.	Nov.2018	-	0%	Canter, FJ Series	-
9	Toyota	Assembly Services Sdn. Bhd.		Feb.1968	RM 7.5	0% ^{*4}	Corolla Cross, Fortuner, Hilux, Yaris, Yaris Cross, Vios, Hiace	1,655
10	UD Trucks	Tan Chong Industrial Equipment Sdn. Bhd.		-	-	0%	Trucks	-

●COMPONENTS MANUFACTURING COMPANIES

Location/Number	Manufacturer	Company Name	Est.	Capitalization (x 1 million)	Equity Stake	Products	Employees (2025)
11	Daihatsu	Perodua Engine Manufacturing Sdn. Bhd.	Sep.1996	RM 40	0% ^{*1}	Engines	1,528
12		Daihatsu Perodua Engine Manufacturing Sdn. Bhd.	Sep.2014	RM 165	51%	Engines	585
13	Honda	Honda Assembly (Malaysia) Sdn. Bhd.	Mar.2013	RM 1	51%	Transmissions and Engine Valves	-
14	Mitsubishi	MMC Manufacturing Malaysia Sdn. Bhd.	Nov.2019	RM 20	60%	Module Assembly	18

●R&D & OTHER OPERATIONS

Location/Number	Manufacturer	Company Name	Est.	Capitalization (x 1 million)	Equity Stake	Functions	Employees (2025)
15	Daihatsu	Perodua Manufacturing Sdn. Bhd.	-	-	-	Product Planning, Styling Design, Development, Engineering and Testing	4,629 ^{*5}

Chart based on publicly available data from JAMA member companies

(*1)An investment through local subsidiary company
(*2)Toyota brand model
(*3)Isuzu Motors Asia 51%
(*4)Assembly Services Sdn. Bhd. is 100% owned by UMW Toyota Motor Sdn. Bhd., UMWT is 39% owned by Toyota Motor Corporation
(*5)R&D employees are included in Perodua Manufacturing Sdn. Bhd.



Body Welding Process at Mazda Malaysia Sdn. Bhd. (MMSB)

R&D & OTHER OPERATIONS

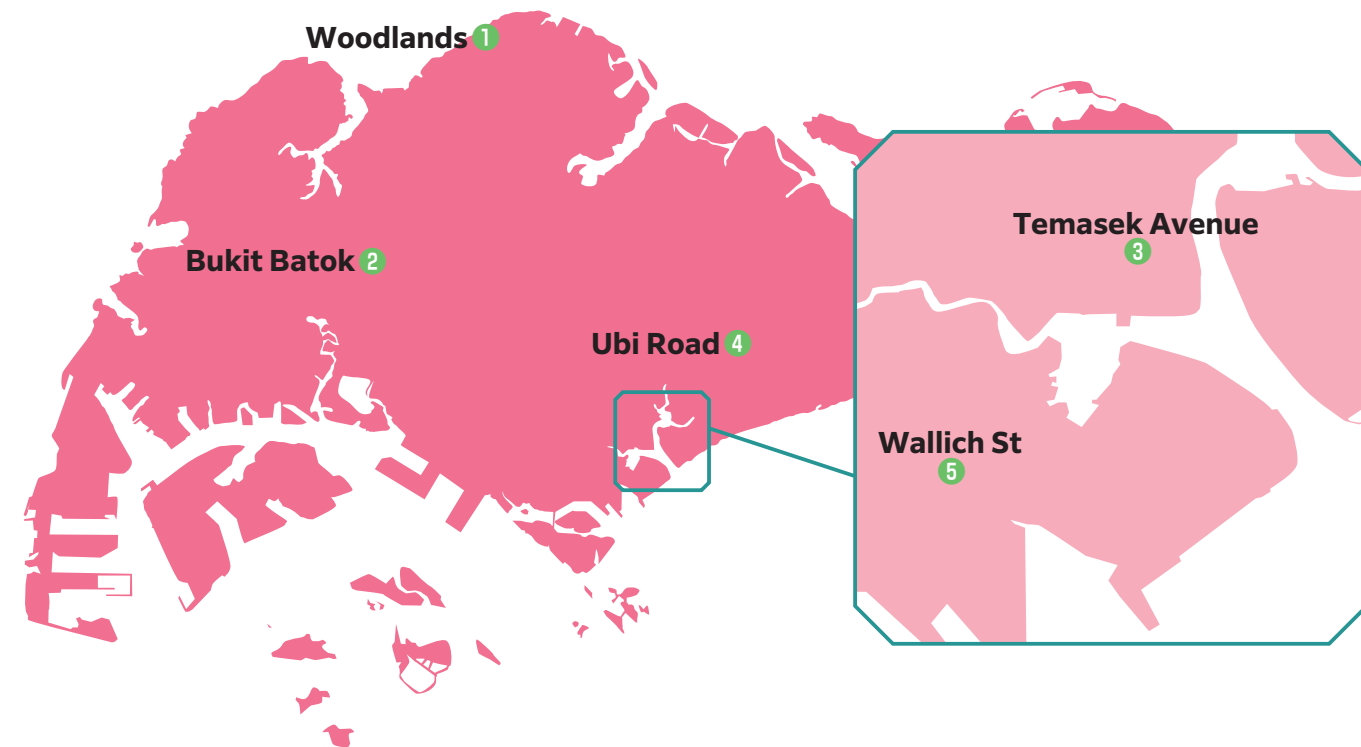
Location/Number	Manufacturer	Company Name	Est.	Capitalization (x 1 million)	Equity Stake	Function	Employees (2025)
1	Honda	Singapore Safety Driving Centre Ltd.	Jul.1983	SGD 2	32.5% ^{*1}	Education at the Time of Obtaining Motorcycle Riding or Automobile or Heavy Vehicle Driver's Licenses and Safety Training for Companies and Communities.	-
2		Bukit Batok Driving Centre Ltd.	Apr.1990	SGD 5	46% ^{*2}	Education at the Time of Obtaining Motorcycle Riding or Automobile or Driver's Licenses and Safety Training for Companies and Communities.	-
3	Isuzu	Isuzu Motors ASIA Ltd.	Mar.1996	USD 220	100%	Wholesale of Manufacturing and Service Parts, Control of Business and Distribution in the Asian Area, Marketing in Cambodia, Laos and Myanmar.	50
4	Nissan	NISSAN Singapore Pte. Ltd.	Apr.2012	USD 10	100%	Wholesales of New Vehicles in Singapore, Support of Marketing, Sales Operations and Franchise Supervision in Singapore.	6
5	Toyota	Toyota Motor Asia (Singapore) Pte. Ltd ^{*3}	Jul.1990	SGD 6	100%	Sales and Marketing Support for Sales Companies in Asia, Parts Supply to ASEAN Countries.	300

Chart based on publicly available data from JAMA member companies

(*1)Singapore Safety Driving Centre Ltd. is 32.5% owned by Honda Motor Co., Ltd. and Rainbow Motor School in Japan.

(*2)Bukit Batok Driving Centre Ltd. is 26% owned by Honda Motor Co.,Ltd. and 20% owned by Rainbow Motor School in Japan.

(*3)The company name was changed from Toyota Motor Asia Pacific Pte. Ltd. to the current name in June 2024.



Driving Philippine Logistics with Hino's Dependable Quality



AUTOMOBILE PRODUCTION COMPANIES

Location/Number	Manufacturer	Company Name/facility name	Est.	Capitalization (x 1 million)	Equity Stake	Products	Employees (2025)
1	Hino	Hino Motors Philippines Corp.	Mar.1975	PHP 900	74%	Trucks, Buses & Body	942
2	Isuzu	Isuzu Philippines Corp.	Aug.1995	PHP 1,000	35%	Assembly of Small and Medium-Sized CVs, LCVs and Buses	452
3	Mitsubishi	Mitsubishi Motors Philippines Corp.	Feb.1963	PHP 1,640	100%	Mirage G4 (Attrage), Mirage, L300	1,443
4	Toyota	Toyota Motor Philippines Corp.	Aug.1988	PHP 1,549	34%	Innova, Vios, Tamaraw	4,490

COMPONENTS MANUFACTURING COMPANIES

Location/Number	Manufacturer	Company Name/facility name	Est.	Capitalization (x 1 million)	Equity Stake	Products	Employees (2025)
5	Honda	Honda Parts Manufacturing Corp.	Dec.1992	USD 27	100% ^{*1}	Manual Transmissions	-
6	Isuzu	Isuzu Autoparts Manufacturing Corp.	Nov.1996	PHP 442	0% ^{*2}	Transmissions	472
7	Mitsubishi	Asian Transmission Corp.	Jan.1973	PHP 770	100%	Processing and Assembly of Transmissions	495
8	Toyota	Toyota Aisin Philippines, Inc.	Aug.1990	PHP 1,000	34%	Manual Transmissions, Front Axles, Rear Pinion Gears	1,043

R&D & OTHER OPERATIONS

Location/Number	Manufacturer	Company Name	Est.	Capitalization (x 1 million)	Equity Stake	Functions	Employees (2025)
9	Honda	Honda Cars Philippines Inc.	Oct.1990	PHP 1,100	74.2%	Sales	-

Chart based on publicly available data from JAMA member companies

(*1)HMSB 100%

(*2)Isuzu Motors Asia 100%

●AUTOMOBILE PRODUCTION COMPANIES

Location/ Number	Manufacturer	Company Name/facility name		Est.	Capitalization (x 1 million)	Equity Stake	Products	Employees (2025)
1	Hino	Hino Motor Manufacturing (Thailand) Ltd.	Samrong Plant	Jul. 1964	THB 2,500	80%	Trucks and Unit Production	2,828
2			Bangplee Plant	Nov.1992				
3			Bangpakong Plant	Feb.2004				
4			Suvarnabhumi Plant	Jan.2023				
5	Honda	Honda Automobile (Thailand) Co., Ltd.	Prachinburi	Mar.2016	THB 5,460	88.99% ^{*1}	City Sedan, City Hatchback, HR-V	-
6	Isuzu	Isuzu Motor Co., (Thailand) Ltd.		Apr.1966	THB 8,500	0% ^{*2}	Large And Small-Sized CVs and Pick Up Trucks	5,469
7	Mazda	Auto Alliance (Thailand) Co., Ltd.		1995	THB 8,440	50%	MAZDA2, CX-3, CX-30	4,926
8	Mitsubishi	Mitsubishi Motors (Thailand) Co., Ltd.		May.1961	THB 7,000	100%	Triton, Pajero Sport, Xpander HEV, Xforce HEV, Mirage/Attrage	5,026
9	Nissan	Nissan Motor (Thailand) Co., Ltd.		Jul.2014	THB 3,700	75%	Navara, Terra	2,299
10	Toyota	Toyota Motor Thailand Co., Ltd.	Samrong	Feb.1964	THB 7,520	86.4%	Hilux, Hilux Champ	12,596
11			Gateway	Feb.1996			Camry, Corolla, Corolla Cross, Yaris, Yaris Ativ, Yaris Cross	
12			Ban Pho	Jan.2007			Fortuner, Hilux, Land Cruiser FJ	
13		Toyota Auto Works Co., Ltd.		Dec.2012	THB 21.7	0% ^{*3}	Ace	391
14	UD Trucks	Thai-Swedish Assembly		Nov.1991	THB 357	49%	Trucks	-

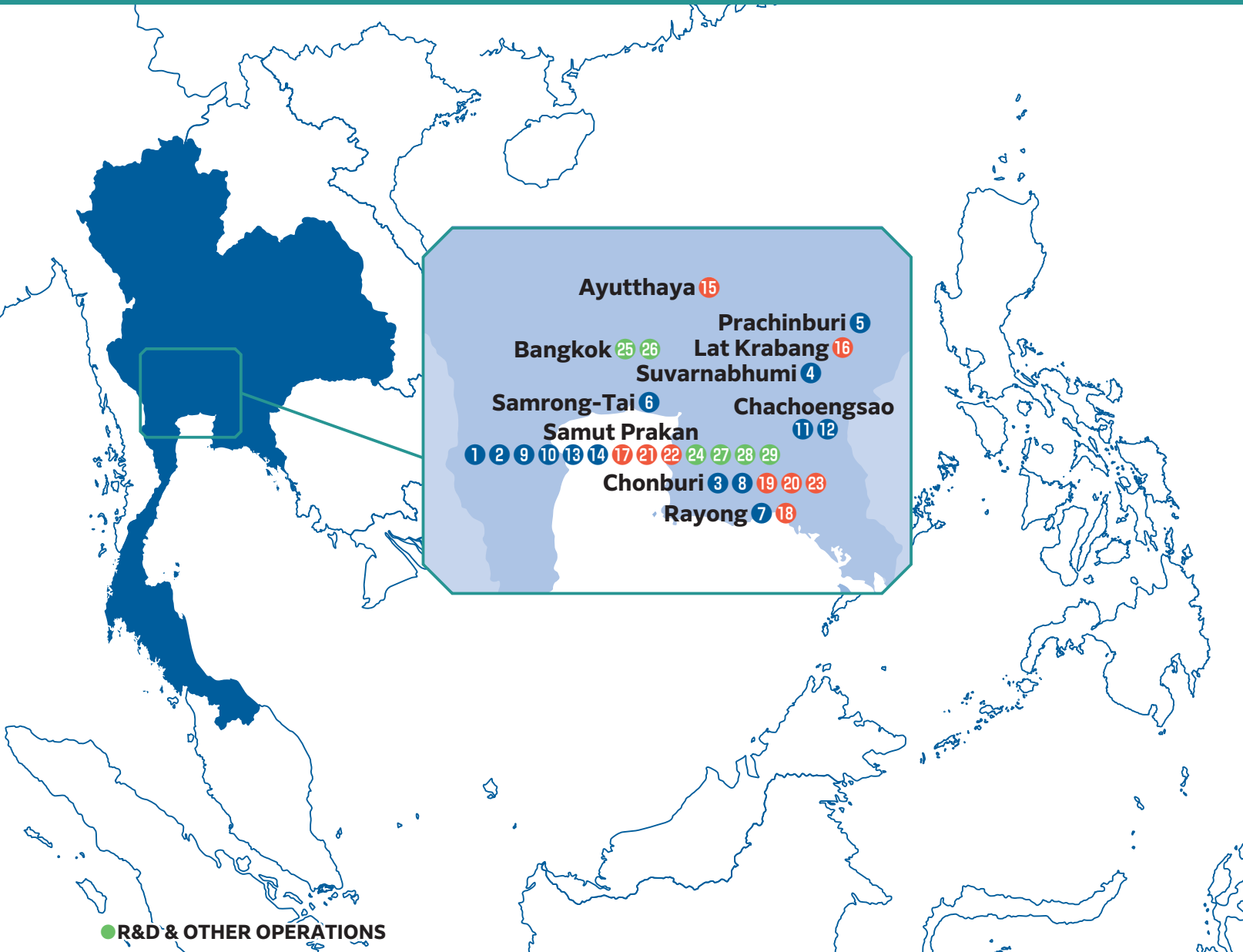
●COMPONENTS MANUFACTURING COMPANIES

Location/ Number	Manufacturer	Company Name/facility name		Est.	Capitalization (x 1 million)	Equity Stake	Products	Employees (2025)
15	Honda	Asian Parts Manufacturing Co., Ltd.	Ayutthaya	Apr.2006	THB 700	100%	Sheet Metal Parts for Repair of Major Components	-
16	Isuzu	Isuzu Engine Manufacturing Co., (Thailand) Ltd.		Jul.1987	THB 1,025	1.4% ^{*4}	Diesel Engines	1,397
17		Thai International Die Making Co., Ltd.		Sep.1987	THB 212.7	0% ^{*5}	Forging of Press Molds, Press Processing	598
18		IT Forting (Thailand) Co., Ltd.		Dec.1994	THB 700	0% ^{*6}	Forged Parts	293
19	Mazda	Mazda Powertrain Manufacturing (Thailand) Co., Ltd.		2013	THB 8,167	100%	Engines, Transmissions	773
20	Mitsubishi	MMTh Engine Co., Ltd.		May.1988	THB 20	100% ^{*7}	Engines, Stamping Parts	-
21	Nissan	Nissan Powertrain (Thailand) Co., Ltd.		Aug.1987	THB 1,400	90%	Engines	337
22		SNN Tools & Dies Co., Ltd.		Feb.1989	-	27.8%	Stamping Dies, Tools & Jigs, Stamping Parts	203
23	Toyota	Siam Toyota Manufacturing Co., Ltd.		Jul.1987	THB 2,850	96%	Engines	3,000

Community Outreach Activity by Mazda Powertrain Manufacturing (Thailand) Co., Ltd.



The Hilux Travo, Produced at Toyota Motor Thailand's Ban Pho plant

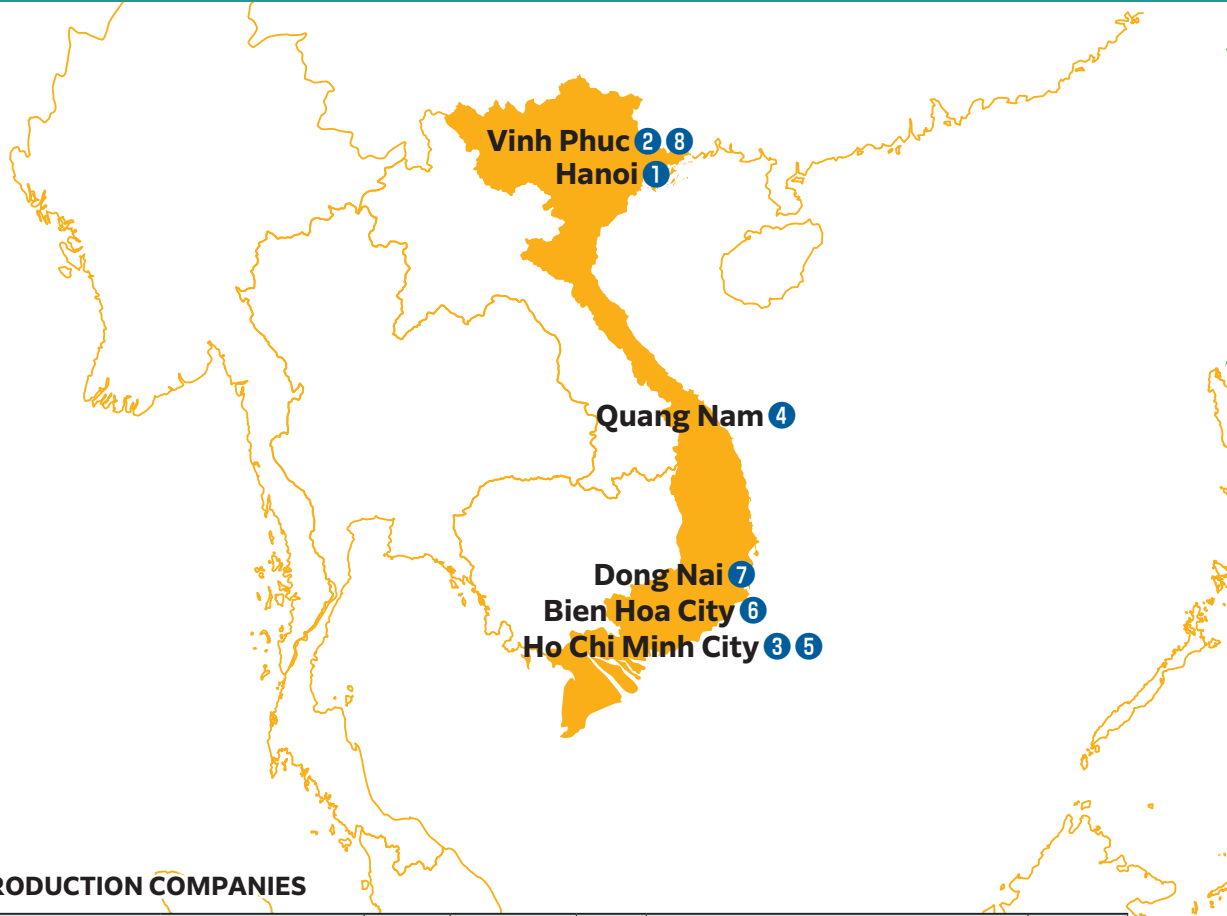


●R&D & OTHER OPERATIONS

Location/ Number	Manufacturer	Company Name	Est.	Capitalization (x 1 million)	Equity Stake	Functions	Employees (2025)
24	Hino	Hino Motors Asia Ltd.	Aug.2020	THB 560	100%	Manage and operate business as region headquarters. R&D, Demand & Supply and Total support.	215
25	Honda	Honda R&D Asia Pacific Co., Ltd.	Dec.2005	THB 200	100% ^{*8}	Product Planning, Styling Design, Engineering Design, Vehicle Test and Material Research	-
26	Isuzu	Isuzu Technical Center of Asia Co., Ltd.	Dec.1991	THB 40	0% ^{*9}	Vehicle Engineering	289
27		Isuzu Global CV Engineering Center Co., Ltd.	Jan.2014	THB 100	0% ^{*10}	Planning and Engineering of New Product Including a Commercial Vehicle and Its Relevant Parts and Components for Emerging Markets	192
28	Nissan	Nissan Motor Asia Pacific Co., Ltd.	July.2011	THB 224.5	100%	Regional Marketing and Sales Function, Product Planning and Management Office, R&D Strategy and Management	288
29	Toyota	Toyota Motor Asia (Thailand) Co., Ltd. ^{*11}	Apr.2007	THB 1,300	100%	Vehicle Development for Asia and Emerging Countries, Operational Support for Manufacturing Companies in Asia	2,400

Chart based on publicly available data from JAMA member companies

(*1)Honda Automobile (Thailand) Co., Ltd. is 63.99% owned by Honda Motor Co., Ltd. and 25.00% owned by Asian Honda Motor Co., Ltd.
(*2)Isuzu Motors Asia 71.1%
(*3)Toyota Auto Works Co., Ltd. is 37% owned by Toyota Motor Thailand Co., Ltd.
(*4)Isuzu Motors Asia 68.6%, Isuzu Asia Thailand 25%, Isuzu Motros Co (Thailand) Ltd. 5%, Isuzu Motors Ltd. 1.4%
(*5)Isuzu Motors Co., (Thailand) Ltd. 40%, Isuzu Motors Asia 35%, Isuzu Asia Thailand 25%
(*6)Isuzu Asia Thailand 39.3%, Isuzu Motors Co., (Thailand) Ltd. 28.6%, IJTT 25%, Tri Petch Isuzu Sales Co., Ltd. 7.1%
(*7)MMTh Engine Co., Ltd. is 100% owned by Mitsubishi Motors Thailand Co., Ltd.
(*8)Honda R&D Asia Pacific Co., Ltd. is 100% owned by Honda R&D Co., Ltd.
(*9)Isuzu Asia 75%, Isuzu Motors Asia Thailand 25%
(*10)Isuzu Motors Asia Thailand 100%
(*11)The company name was changed from Toyota Daihatsu Engineering & Manufacturing Co., Ltd. to the current name in June 2024.



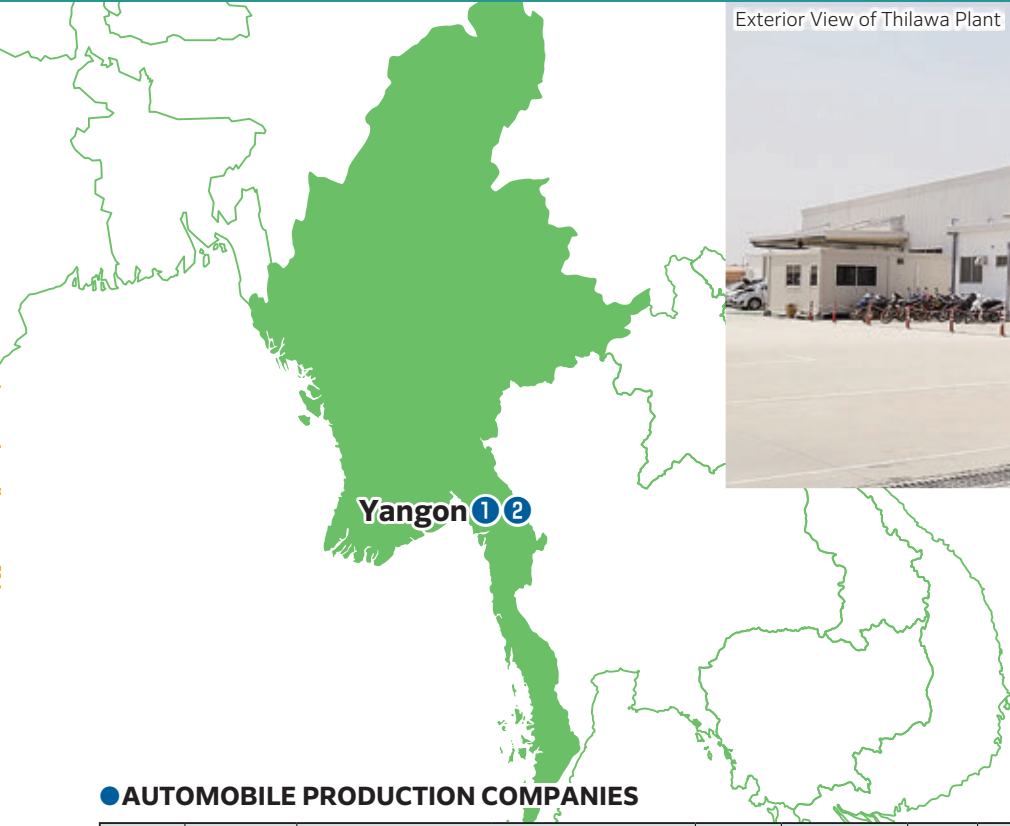
●AUTOMOBILE PRODUCTION COMPANIES

Location/Number	Manufacturer	Company Name/facility name		Est.	Capitalization (x 1 million)	Equity Stake	Products	Employees (2025)
1	Hino	Hino Motors Vietnam, Ltd.		Jun.1996	USD 8.11	51%	Trucks and Buses	227
2	Honda	Honda Vietnam Co., Ltd.	Vinh Phuc	Mar.1996	USD 62.9	70%*1	Accord, Civic, HR-V,BR-V,CR-V, CITY, Type-R	-
3	Isuzu	Isuzu Vietnam Co., Ltd.		Oct.1995	USD 15	42%	Heavy Duty Trucks, Medium Duty Trucks, Light Duty Trucks & Bus Chassis	530
4	Mazda	Thaco Mazda Automobile Manufacturing Company		-	-	-	CX-3, CX-5, CX-8, MAZDA3	-
5	Mitsubishi	Mitsubishi Motors Vietnam Co., Ltd.		Apr.1994	USD 18	41.2%	Xpander	439
6	Mitsubishi Fuso	THACO Auto LLC		Dec.2017	-	0%	Canter	-
7	Suzuki	Vietnam Suzuki Corp.	Long Binh	Apr.1995	USD 76	100%	Vehicles	310
8	Toyota	Toyota Motor Vietnam Co., Ltd.		Sep.1995	USD 49	70%	Avanza, Fortuner, Veloz, Vios	1,370

Chart based on publicly available data from JAMA member companies

(*1)Honda Vietnam Co., Ltd. is 42% owned by Honda Motor Co., Ltd. and 28% owned by Asian Honda Motor Co., Ltd.

Test Drive Event



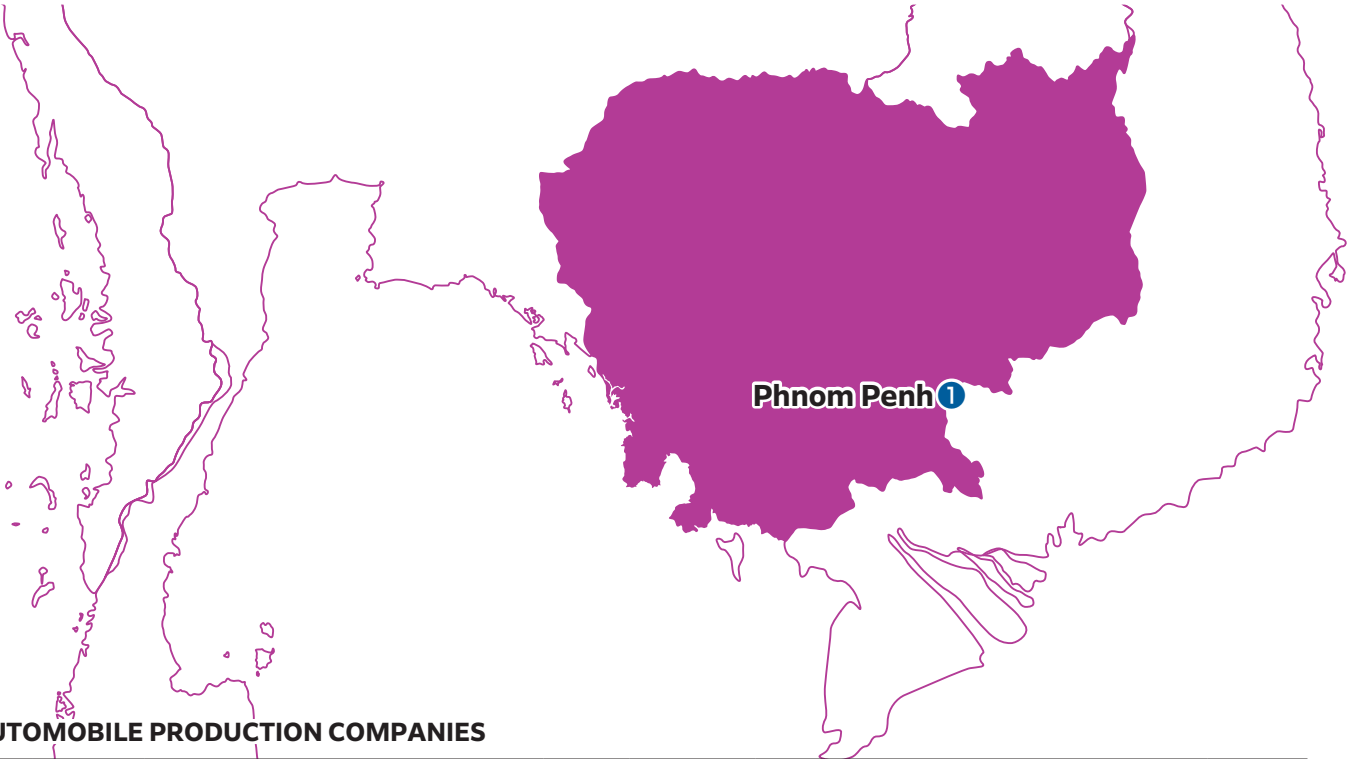
Exterior View of Thilawa Plant



●AUTOMOBILE PRODUCTION COMPANIES

Location/Number	Manufacturer	Company Name/facility name		Est.	Capitalization (x 1 million)	Equity Stake	Products	Employees (2025)
1	Suzuki	Suzuki Thilawa Motor Co.,Ltd.	Thilawa Plant	Jul.2015	USD 35	100%	Vehicles	213
2	Toyota	Toyota Myanmar Co., Ltd.		Jun.2019	USD 24	85%	Hilux	64

Chart based on publicly available data from JAMA member companies



●AUTOMOBILE PRODUCTION COMPANIES

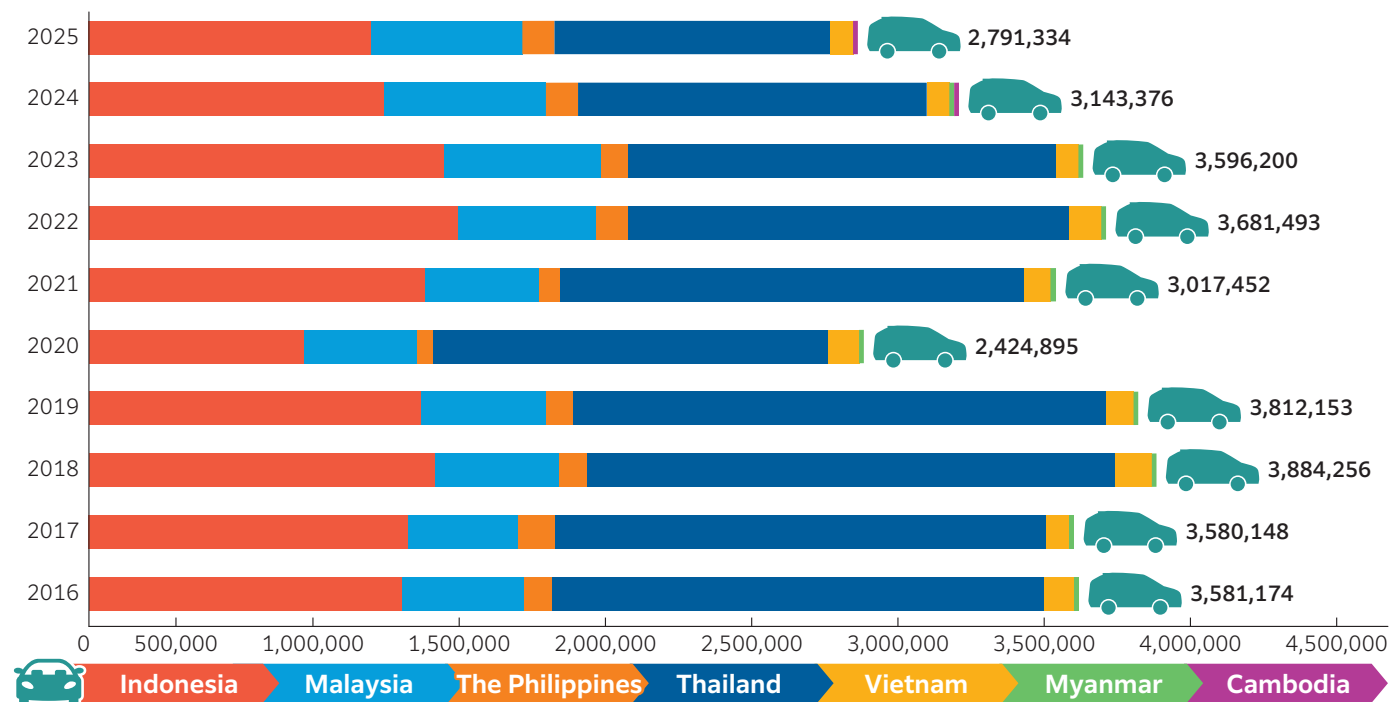
Location/Number	Manufacturer	Company Name/facility name		Est.	Capitalization (x 1 million)	Equity Stake	Products	Employees (2025)
1	Toyota	Toyota Tsusho Manufacturing (Cambodia) Co., Ltd.		Aug.2023	USD 21	0% *1	Hilux, Fortuner	141

Chart based on publicly available data from JAMA member companies

(*1)Toyota Tsusho Manufacturing (Cambodia) Co., Ltd. is 90% owned by Toyota Tsusho Corporation, Toyota Tsusho Corporation is 21.69% owned by Toyota Motor Corporation.

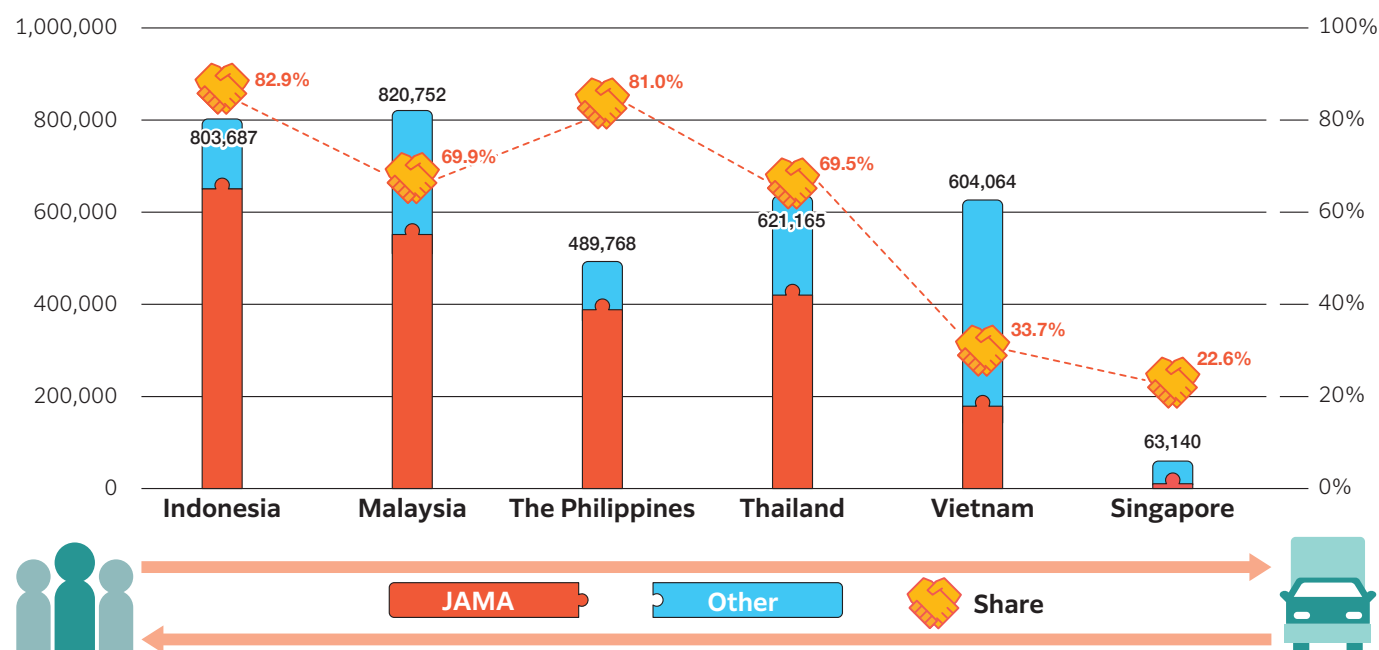
Production

A total of 2.79 million passenger cars, trucks and buses were produced by JAMA member companies and their ASEAN counterparts in 2025.



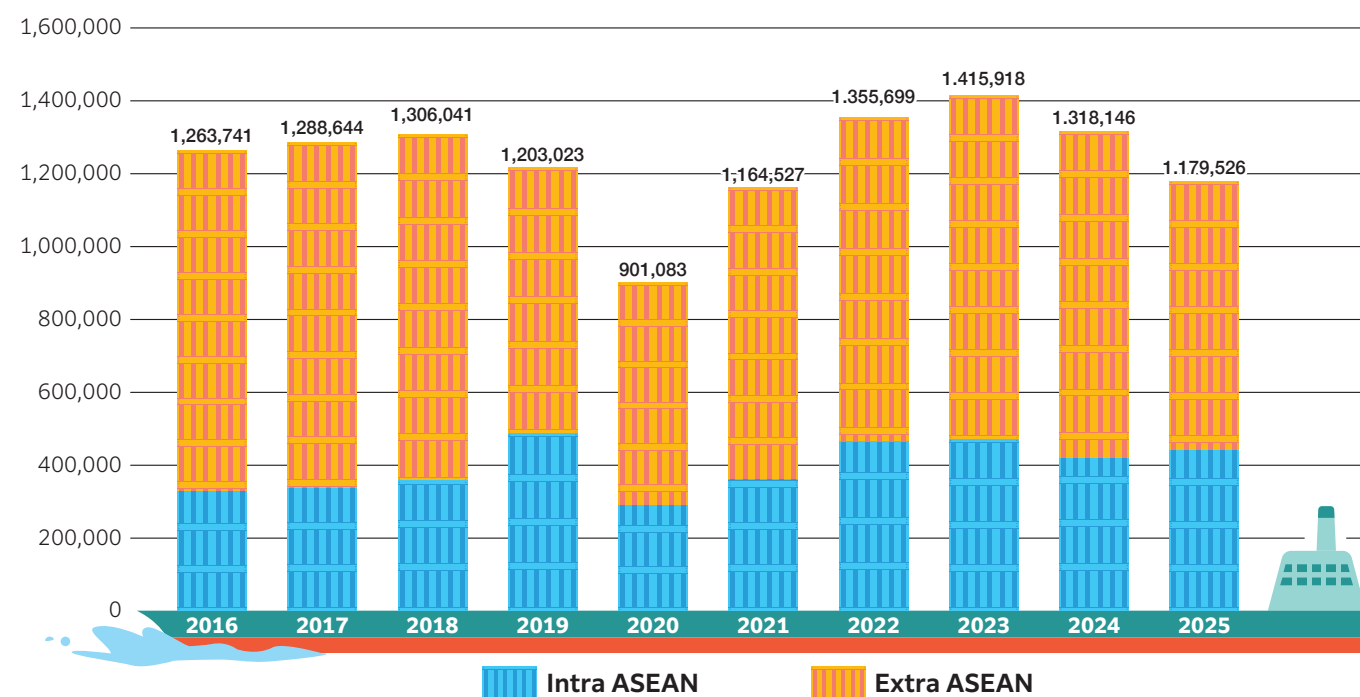
Sales

Out of the 3.4 million new passenger cars, trucks and buses sold in ASEAN in 2025, JAMA member manufacturers' vehicles accounted for approximately 67.2% (2.29 million vehicles), highlighting the continued importance of these partners in the region.



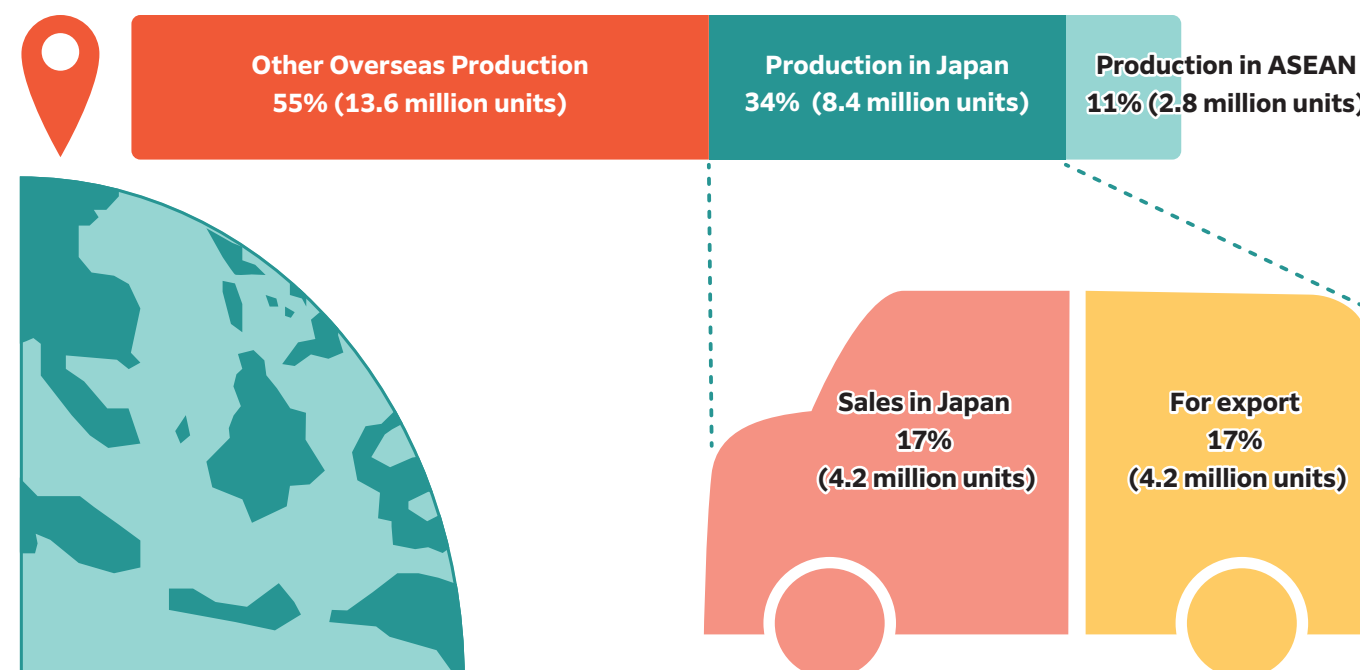
Exports

In 2025, a total of 1.18 million passenger cars, trucks and buses were exported by JAMA member companies and their ASEAN counterparts. Among these, 731,000 units were bound for destinations outside ASEAN, with the remaining vehicles classified as intra-ASEAN exports.



ASEAN's Role in JAMA Members' Global Production

Of the 24.76 million units manufactured globally by JAMA member manufacturers in 2025, 11% were produced in the ASEAN region.



Co-Creation with ASEAN in JAMA Activities

The Seven Priority Challenges Facing the Auto Industry

JAMA's Seven Priority Challenges are highly relevant to the ASEAN automotive industry. We hope that Japan and ASEAN will continue to address these shared challenges together as partners and further promote the advancement of the automotive industry.

2

Implement a multi-pathway approach



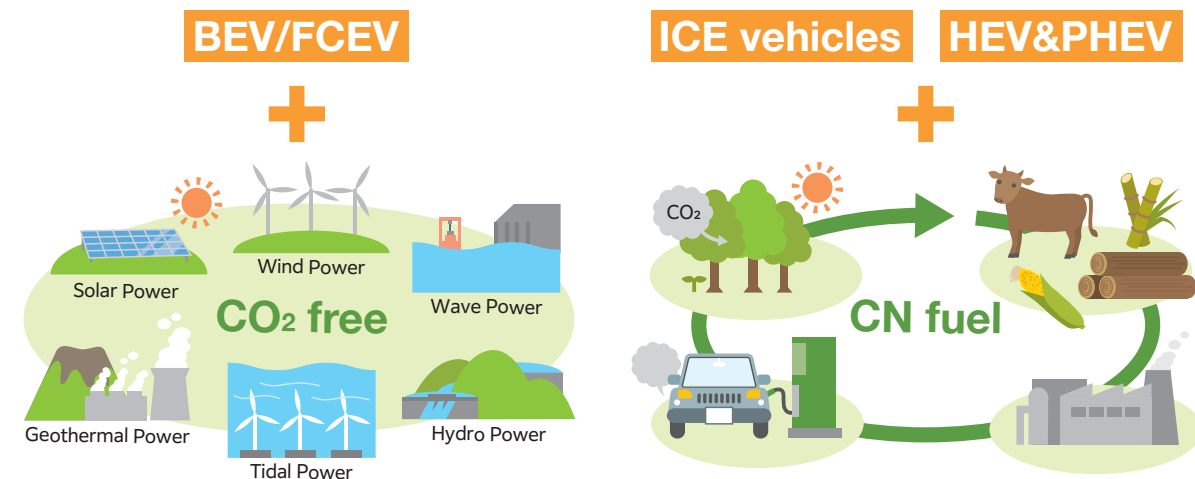
Implementing a multi-pathway approach

To achieve carbon neutrality, JAMA advocates a multi-pathway approach that embraces a variety of solutions tailored to the energy circumstances and social infrastructure of each country or region.

Initiative in Indonesia

At the 6th Japan-Indonesia Automobile Dialogue held in 2025 between Japan's Ministry of Economy, Trade and Industry (METI) and Indonesia's Ministry of Industry, JAMA proposed the development of an action plan for the introduction of E10 (bioethanol-blended fuel) in Indonesia. In cooperation with relevant stakeholders, discussions are underway on fuel standards, vehicle compatibility, and other related issues.

Multi-pathway Approach



1

Secure critical resources and components



3

Build mechanisms for a circular economy



Building mechanisms for a circular economy

With regard to establishing a fully optimized end-of-life vehicle (ELV) management system in Thailand, JAMA has been providing support through a JICA technical cooperation project and participating in discussions on system design and implementation planning. Specifically, JAMA has contributed its expertise on topics such as ELV-recycling collection and processing flows and frameworks for ensuring traceability, while also providing advice and exchanging views based on Japan's experience in operating its own ELV management system. In addition, through participation in Japan's domestic support committee and various dialogue opportunities, JAMA has worked closely with relevant organizations to help shape a system that reflects local conditions and needs. Through these activities, JAMA contributes to both environmental impact reduction and a more robust industrial foundation.

4

Strengthen the human resources foundation



5

Create transportation systems integrating automated driving



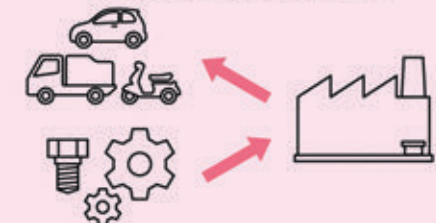
6

Reform automobile-related tax systems



7

Enhance supply chain competitiveness



Co-Creation with ASEAN in JAMA Activities

Hand in Hand Towards the Future

To respond swiftly and comprehensively to the array of challenges faced on a collective basis, JAMA members engage in information exchanges with their ASEAN counterparts on automobile-related policies. Through its continued participation in and organization of multiple annual gatherings and dialogue platforms, JAMA has built a strong partnership with ASEAN.

1 The AMEICC-WGAI (Working Group on the Automobile Industry) Meeting

Since its establishment in 1988, this forum has continued to bring together governments and automotive industry representatives from ASEAN and Japan to promote dialogue and cooperation on the development of the automotive industry and policy challenges.



The 24th AMEICC-WGAI Meeting, November 12, 2025, Kuala Lumpur, Malaysia

2 The ASEAN Automotive Federation Technical Committee 3 and Technical Committee 5 Meetings with JAMA

Meetings between JAMA and the AAF/TC3 (for four-wheeled vehicles) and the AAF/TC 5 (for motorcycles) are held on a regular basis.



The 41st AAF/TC3-JAMA Meeting, March 24–25, 2026, Tokyo, Japan

3 Public and Private Joint Forum in the Asian Region (Asia Government and Industry Meeting)

JASIC organizes a conference where governments and industry representatives from across Asia discuss the international harmonization of automotive safety and environmental regulations, as well as the promotion and expansion of mutual

recognition of the United Nations' vehicle type approval system. JAMA actively participates in the discussions alongside members of the Regulation and Certification Experts (RACE) and contributes to advancing these initiatives.



The 16th Public and Private Joint Forum in Asian Region, November 25–27, 2025, Phnom Penh, Cambodia

Advancing Mobility in ASEAN: Example of a Cooperative Project-Based Initiative

JAMA works to contribute to the creation of a society in which mobility is not only safe, with “zero accidents,” but also optimally efficient, with “zero congestion,” and optimally accessible. Below is a summary of one ongoing initiative to which JAMA contributes in collaboration with the public and private sectors in ASEAN.

The New Car Assessment Program for Southeast Asian Countries (ASEAN NCAP) aims, it states, to “improve motor vehicle safety standards, build a market for safer vehicles and raise consumer awareness.” JAMA endorses these goals and, since the program’s establishment, has been working to improve road traffic safety in the ASEAN region through exchanges of opinions and technical

cooperation. In addition to its contribution to the development of safety assessment methodologies tailored to local traffic conditions in the ASEAN region, JAMA has also begun exchanging views with ASEAN NCAP on future road safety challenges and potential responses.

Road safety involves the interrelationship of three factors—road users, vehicles, and road infrastructure—and increased road safety therefore requires that progress be made in all three areas. JAMA will continue to contribute to efforts aimed at achieving greater road safety in the region, building on its trust-based relationship with ASEAN NCAP through ongoing dialogue and collaboration.



The ASEAN NCAP-JAMA Meeting, October 28, 2025, Bangi, Malaysia

