August, 2017

Research on overseas operations by JAPIA member companies (FY 2016)

Japan Auto Parts Industries Association (JAPIA)

* The results and numerical data before FY 2015 are released only in Japanese. Please see the website in Japanese.

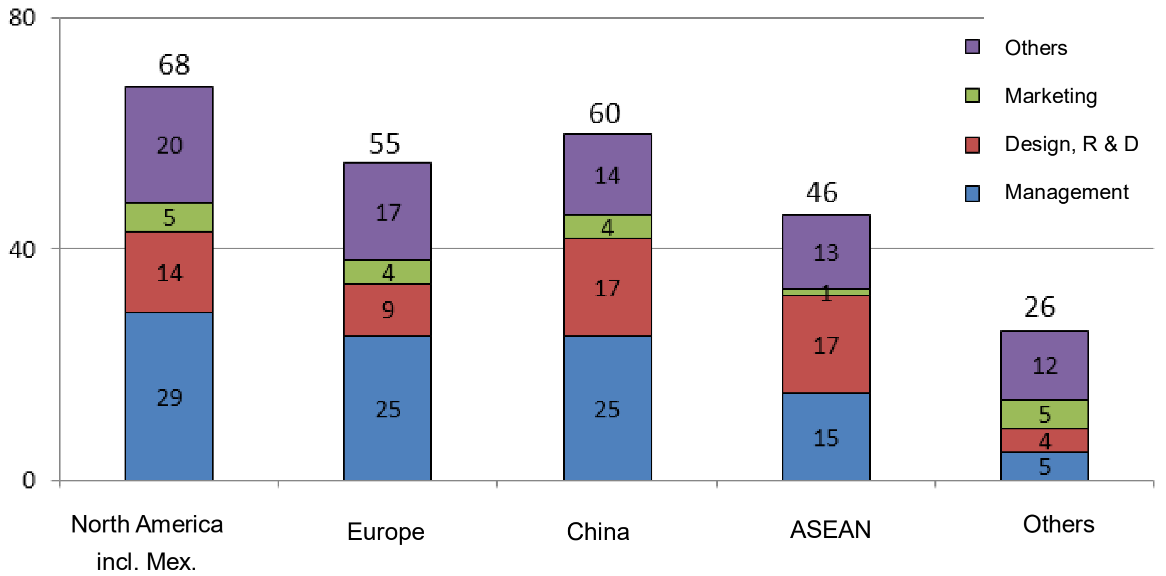
◆ Implementation summary

- Method: Inquiry to member companies
- Inquiry: August 2017
- Target period: Fiscal Year 2016

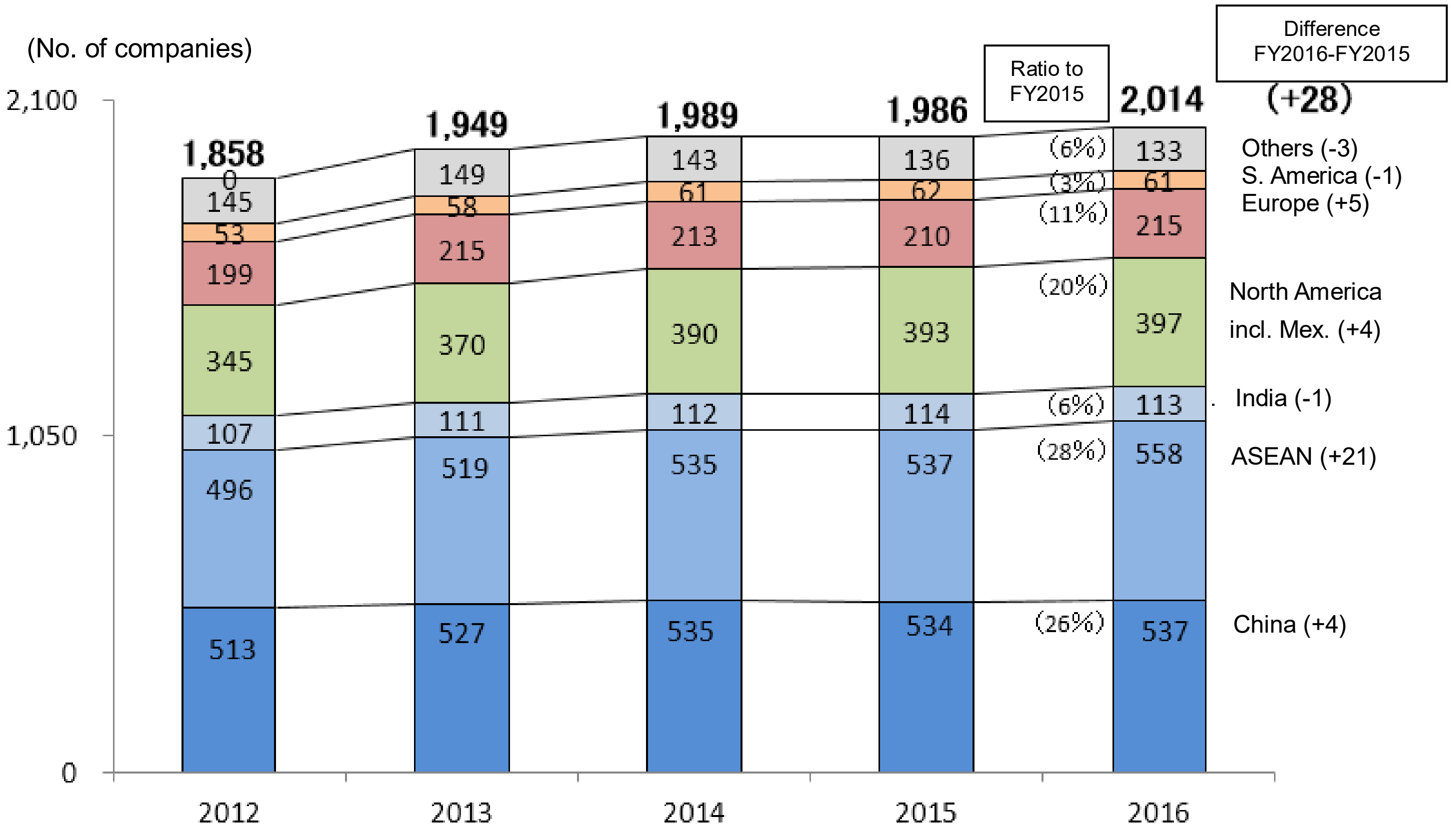
◆ Number of overseas sites of member companies

		North America (incl.Mex)	Europe	Asia	(China)	(ASEAN)	(India)	South America	M.East Africa Others	Total
Production	FY2016	397	215	1,302	537	558	113	61	39	2,014
	FY2015	393	210	1,280	534	537	114	62	41	1,986
Sales	FY2016	79	81	208	53	88	12	12	26	406
	FY2015	78	83	207	53	87	12	12	25	405
Others	FY2016	68	55	129	60	46	5	0	3	255
	FY2015	67	50	123	57	45	4	1	2	243
Total	FY2016	544	351	1,639	650	692	130	73	68	2,675
	FY2015	538	343	1,610	644	669	130	75	68	2,634
Deference (FY2016-FY2015		+6	+8	+29	+6	+23	±0	+2	±0	+41

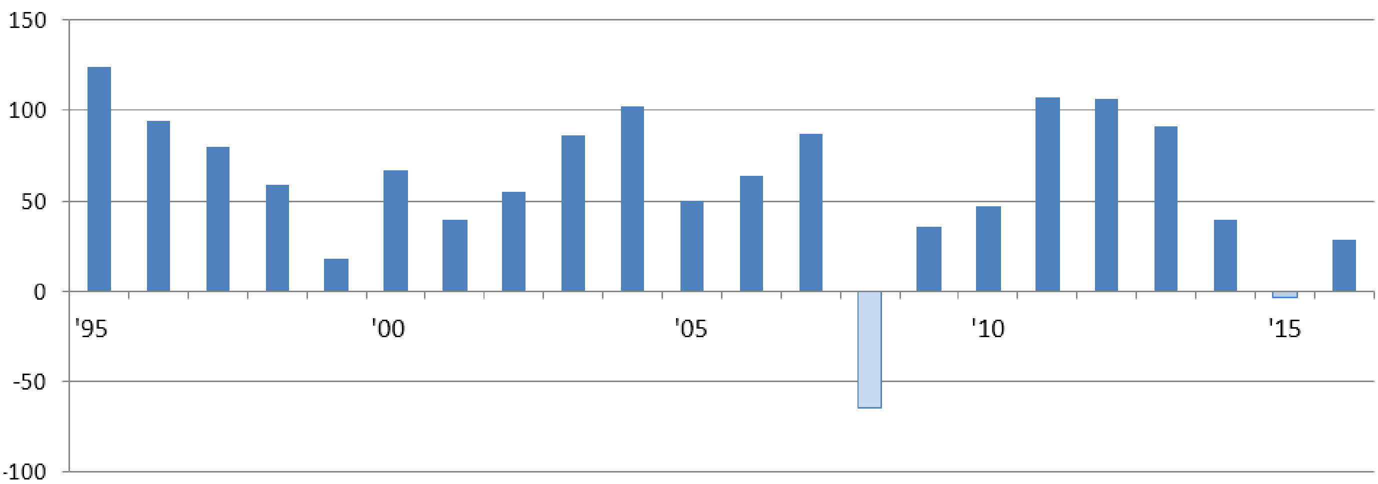
◆ Breakdown of “others” in the table mentioned above



◆ Trends for No. of production sites by region



◆ Increases & decreases of sites (production sites only)



The number of overseas production sites decreased in FY 2015, but turned around due to ASEAN, Europe, North America and China as a whole in FY 2016. There were 28 increases in comparison with the previous year.

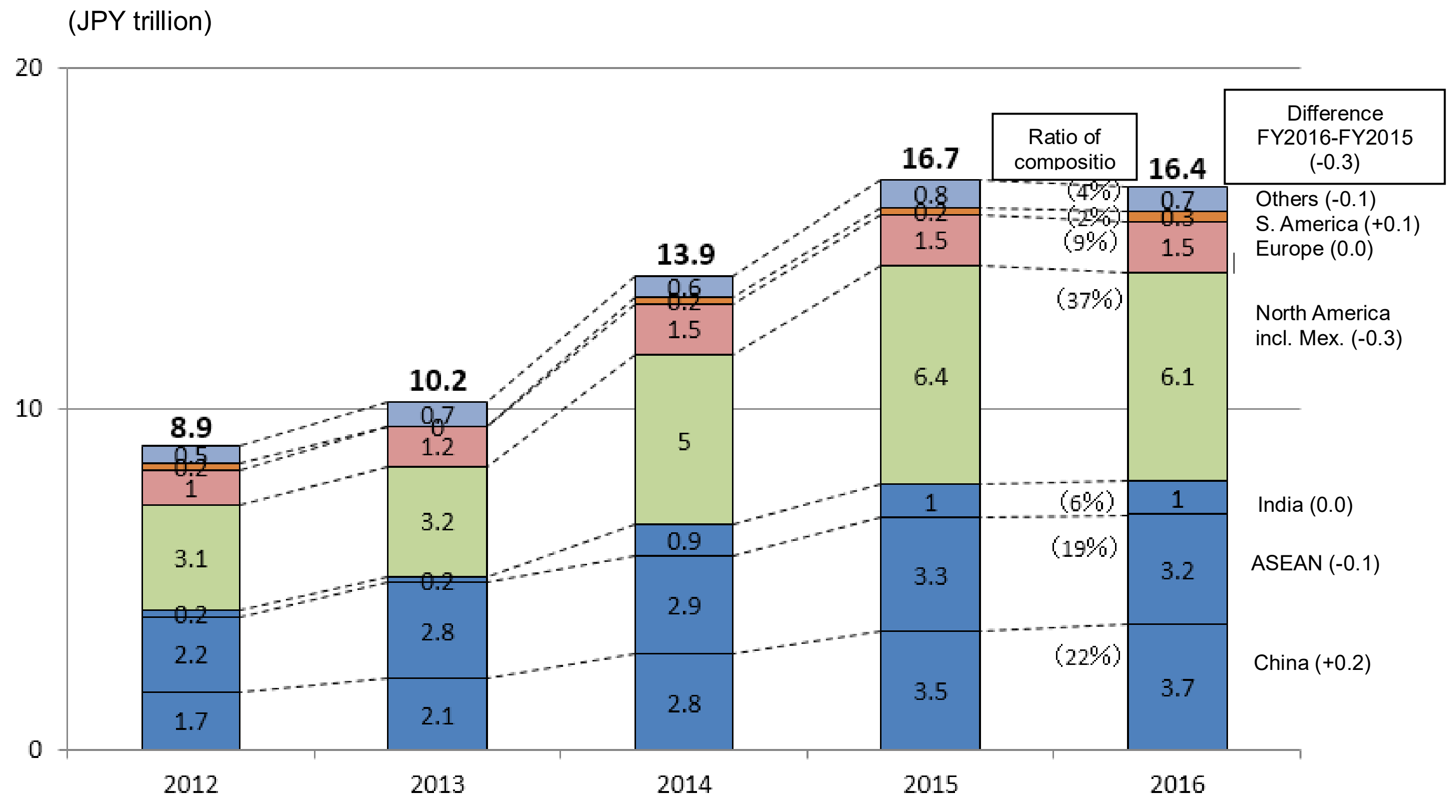
◆ Performances of the overseas member companies by region

	North America incl. Mex.	Europe	ASIA	(China)	(ASEAN)	(India)	S. America	Others	Total
Sales (JPY 100 million)	**61,222**	**15,231**	**83,605**	**36,662**	**32,429**	**10,487**	**2,449**	**2,575**	**165,081**
	63,792	15,425	82,060	35,020	32,604	10,193	2,319	3,727	167,323
Sales per company (JPY 100 million)	**296**	**142**	**128**	**132**	**117**	**187**	**68**	**103**	**160**
	317	143	131	129	124	196	68	162	169
Ratio to the domestic market in the said country (%, weighted average)	**84.4**	**51.3**	**77.8**	**84.8**	**64.5**	**88.5**	**95.4**	**50.7**	**77.6**
	86.2	57.3	76.8	86.2	60.3	92.5	94.3	53.4	78.3
Ratio to Japanese OEMs in the said country (%)	**63.8**	**16.8**	**54.7**	**57.3**	**52.4**	**59.8**	**62.6**	**33.2**	**55.4**
	70.0	21.5	55.8	64.1	48.8	55.3	55.2	7.8	56.9
Ratio to national OEMs in the said country (%)	**8.5**	**29.9**	**13.5**	**17.8**	**2.9**	**19.5**	**28.9**	**7.5**	**13.2**
	10.3	31.5	10.3	12.5	3.1	17.6	22.5	4.2	11.8
Ratio to others (incl. to repair) (%)	**12.1**	**4.5**	**9.6**	**9.8**	**9.3**	**9.2**	**3.9**	**10.0**	**10.0**
	6.0	4.3	10.9	9.9	8.4	19.6	16.5	41.4	9.6
Ratio to exports (%, weighted average)	**15.6**	**48.7**	**22.2**	**15.2**	**35.5**	**11.5**	**4.6**	**49.3**	**22.4**
	13.8	42.7	23.0	13.4	39.7	7.5	5.7	46.6	21.6
Ratio to export to others than Japan (%)	**15.0**	**43.5**	**11.4**	**5.5**	**19.6**	**8.9**	**4.4**	**47.4**	**15.8**
	13.5	42.5	11.1	5.9	19.6	4.0	3.7	46.6	15.2
Ratio of company with the surplus in a single year (%)	**78.2**	**75.0**	**83.8**	**87.8**	**83.1**	**64.6**	**48.1**	**85.7**	**80.7**
	74.7	77.5	74.6	81.5	71.8	43.5	10.3	66.7	72.6
Ratio of company with cumulative surplus (%)	**64.3**	**60.6**	**77.8**	**83.4**	**78.7**	**36.4**	**52.0**	**66.7**	**72.3**
	56.3	51.7	72.3	74.6	75.7	31.1	44.8	55.6	65.5
Ratio of the companies with dividends (%)	**34.8**	**27.4**	**54.6**	**62.9**	**51.2**	**22.7**	**11.5**	**33.3**	**46.0**
	31.4	22.5	50.0	56.7	46.9	16.7	11.5	22.2	41.4
Local contents (%)	**73.1**	**74.5**	**75.2**	**76.8**	**73.3**	**74.2**	**71.2**	**67.4**	**74.4**
	75.6	77.8	75.2	79.3	71.0	71.3	55.8	69.4	74.9
Total No. of employees	**202,185**	**80,595**	**626,829**	**199,717**	**332,186**	**80,244**	**21,080**	**27,377**	**958,066**
	197,638	74,288	586,422	186,660	312,566	73,224	21,275	24,024	903,647
No. of employees per company	**953.7**	**739.4**	**934.2**	**693.5**	**1,173.8**	**1,432.9**	**569.7**	**1,095.1**	**909.0**
	941.1	687.9	917.7	676.3	1,153.4	1,435.8	591.0	1,044.5	889.4
Sales per employee (JPY million)	**30.5**	**19.0**	**13.5**	**18.6**	**9.8**	**13.3**	**12.4**	**9.4**	**17.4**
	33.2	20.8	14.1	19.1	10.5	14.0	11.3	15.5	18.8

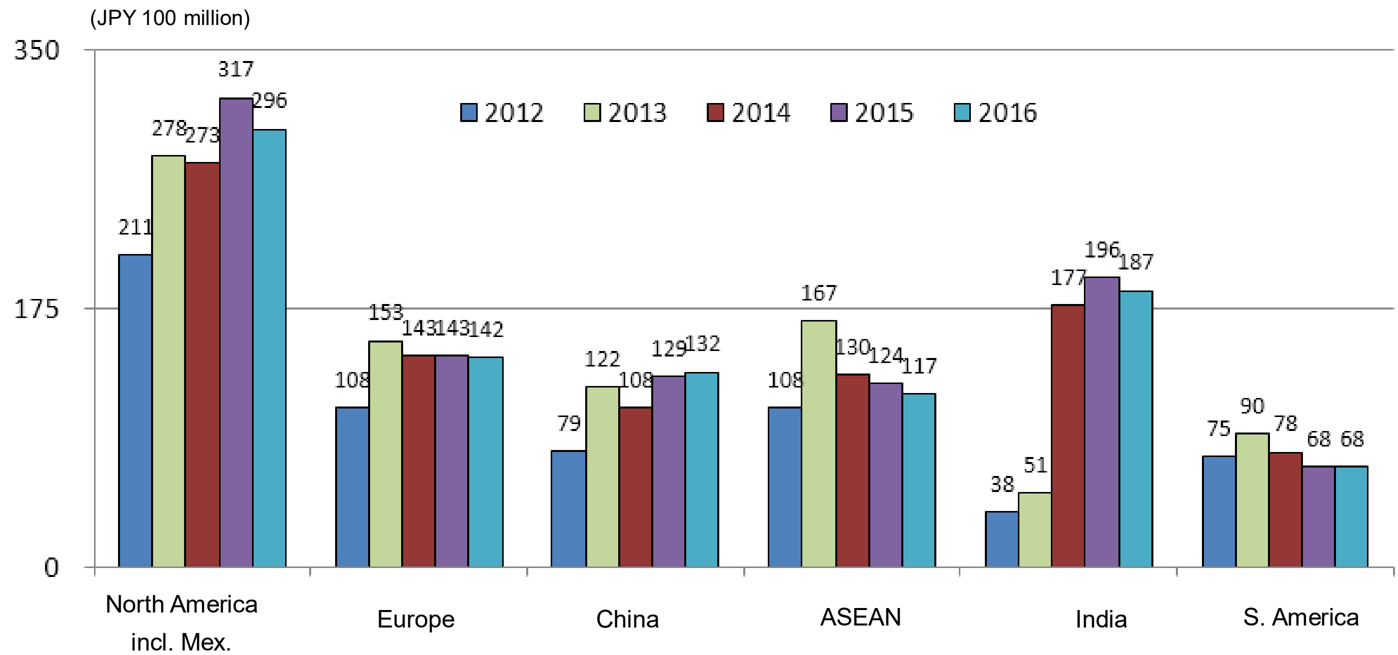
◆ Performances of the overseas member companies in the past 5 FYs

- Sales by region

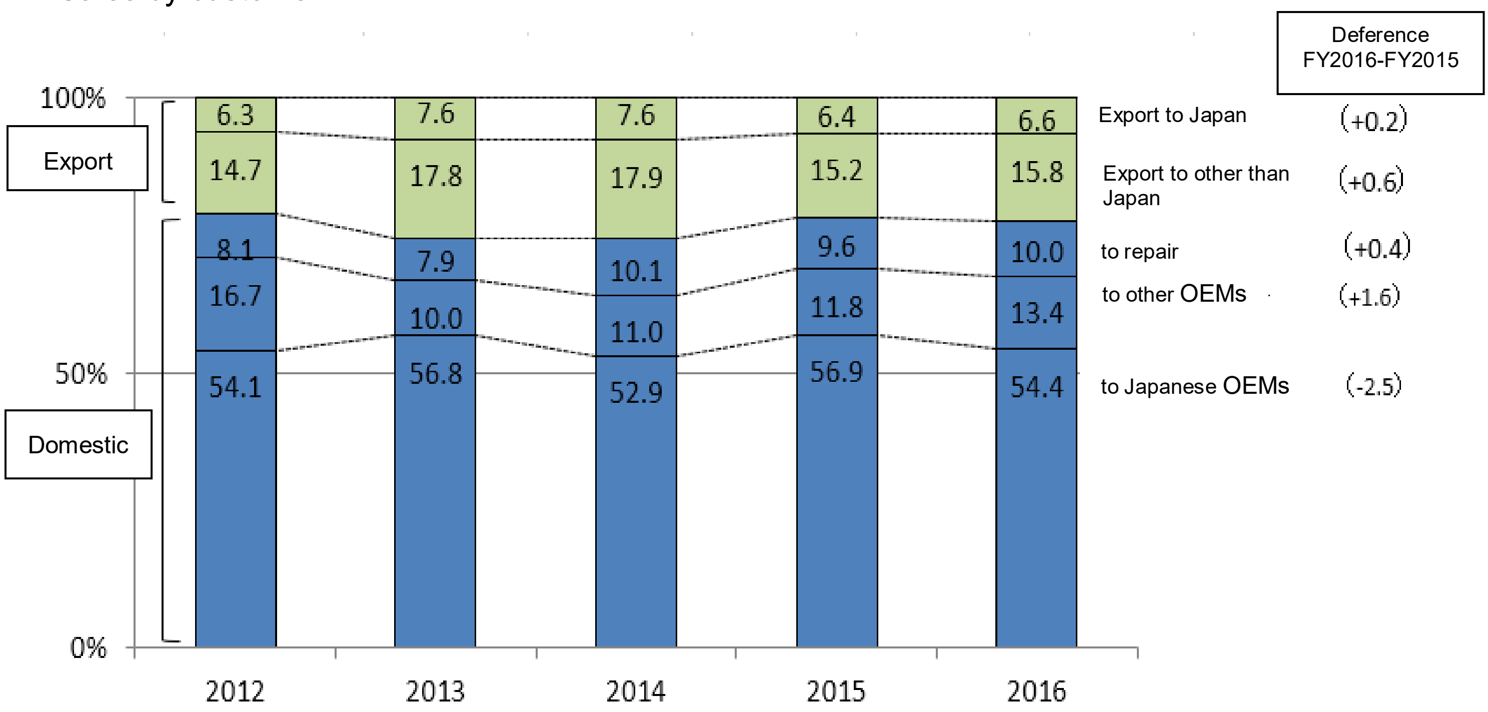
Due to the appreciation trend of JPY (JPY/US$=121 in 2015 to 108 in 2016), sales declined slightly in North America and Europe, although slightly increased in China, India and South America. Total value was JPY 16.4 trillion in FY 2016, 98% of the previous year.



- Sales per company by region

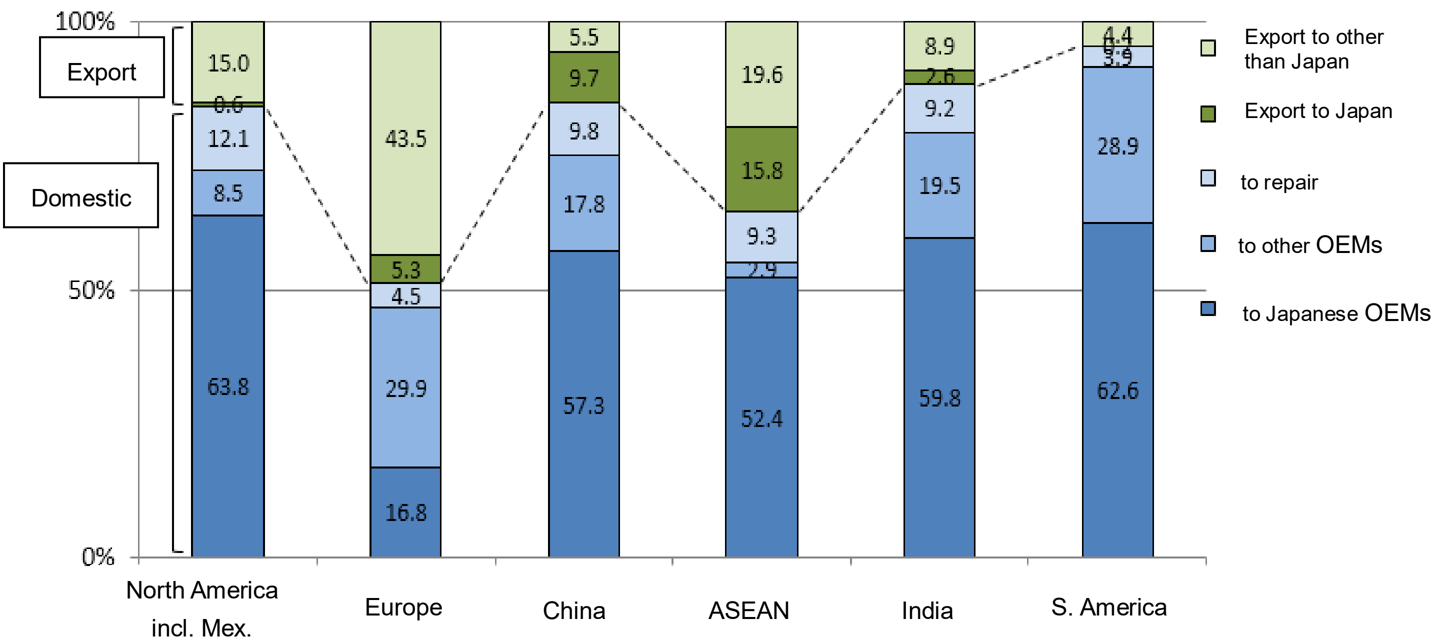


- Sales by customer



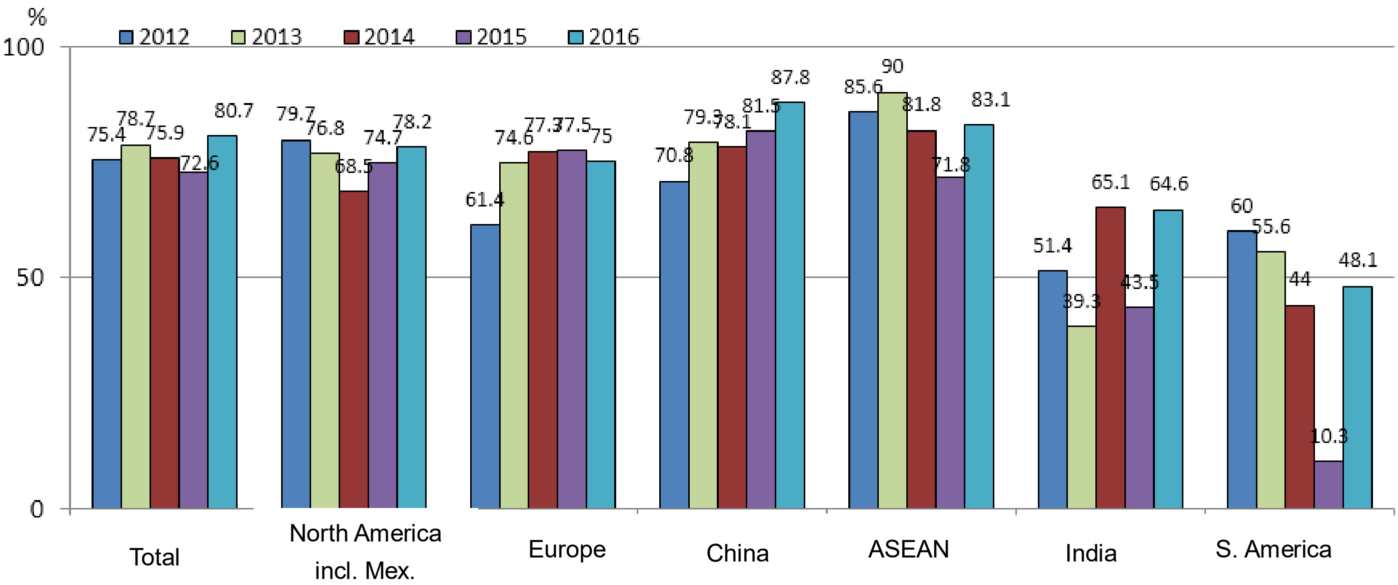
In FY 2016, the dependence on Japanese OEM slightly decreased (-2.5pt) while Ratio to exports (+ 0.8pt) and OEM s other than Japanese increased slightly. Except for imports from Japan, there was no change in the trend regarding local production for local consumption in each area.

- Sales by region and customer



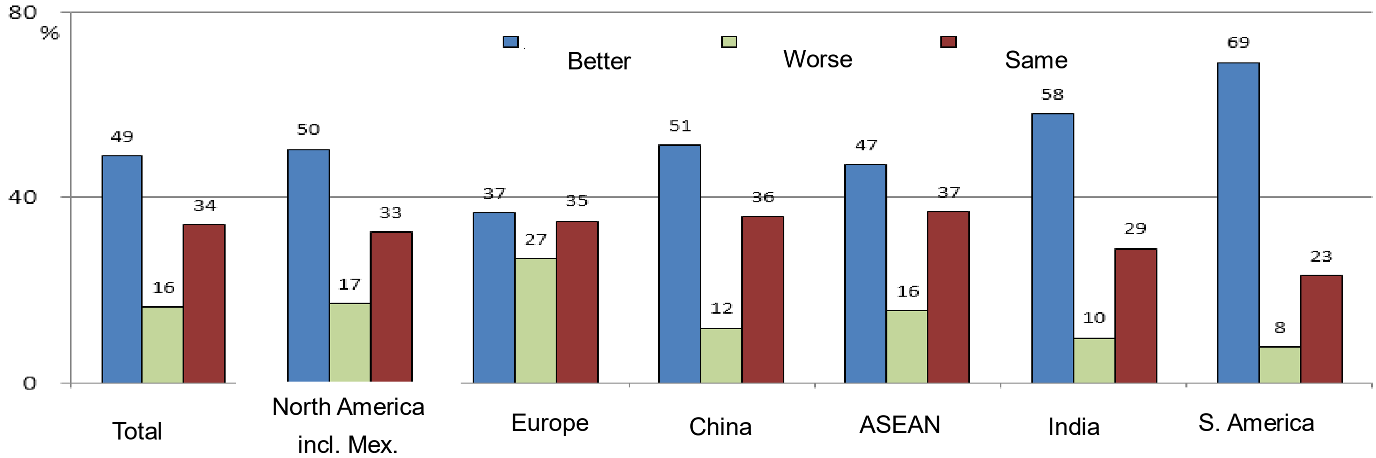
Dependence on Japanese OEM in most areas except Europe is relatively high. The sales to the local OEMs are active in Europe, South America, India and China. In Europe and ASEAN countries, regional exports and mutual complements are brisk.

- Ratio of companies in the surplus in a single year

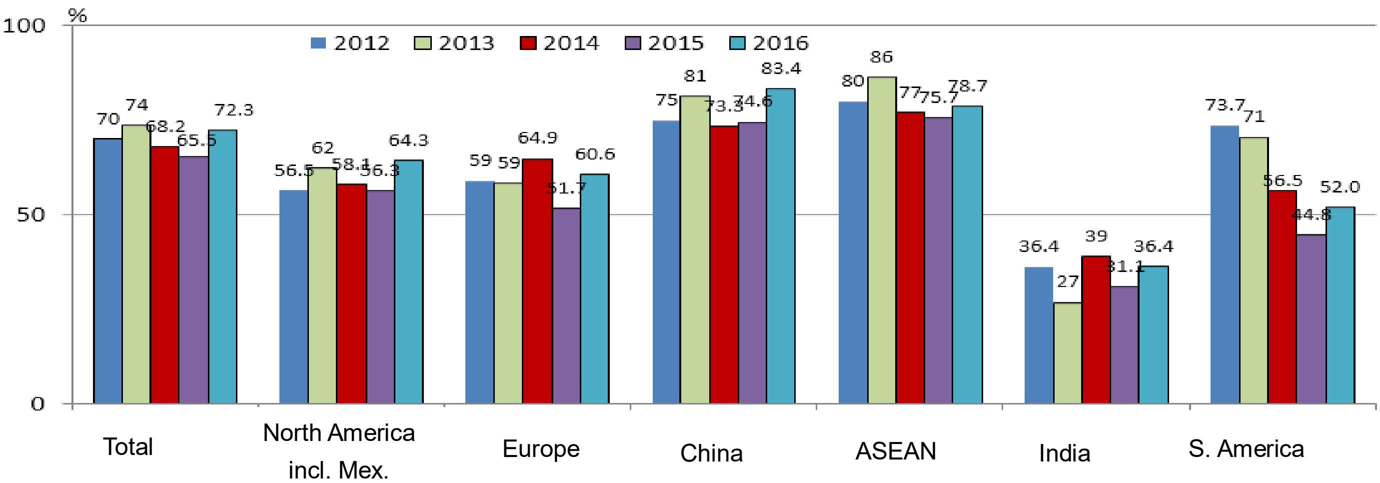


In China, ASEAN and North America, more than 80% of companies are in the surplus business, while struggling in India and South America. But in FY 2016, there was an improvement trend. The surplus ratio as a whole exceeded 80% for the first time.

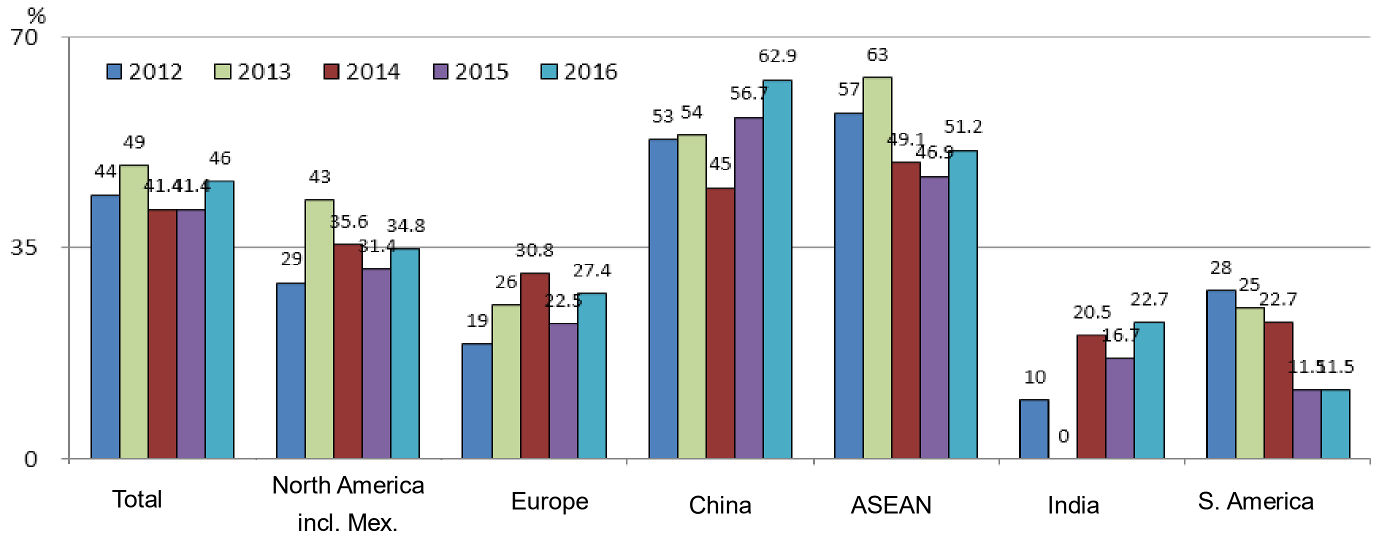
- Business confidence of the companies in the surplus in a single year by region (Comparison to the previous FY)



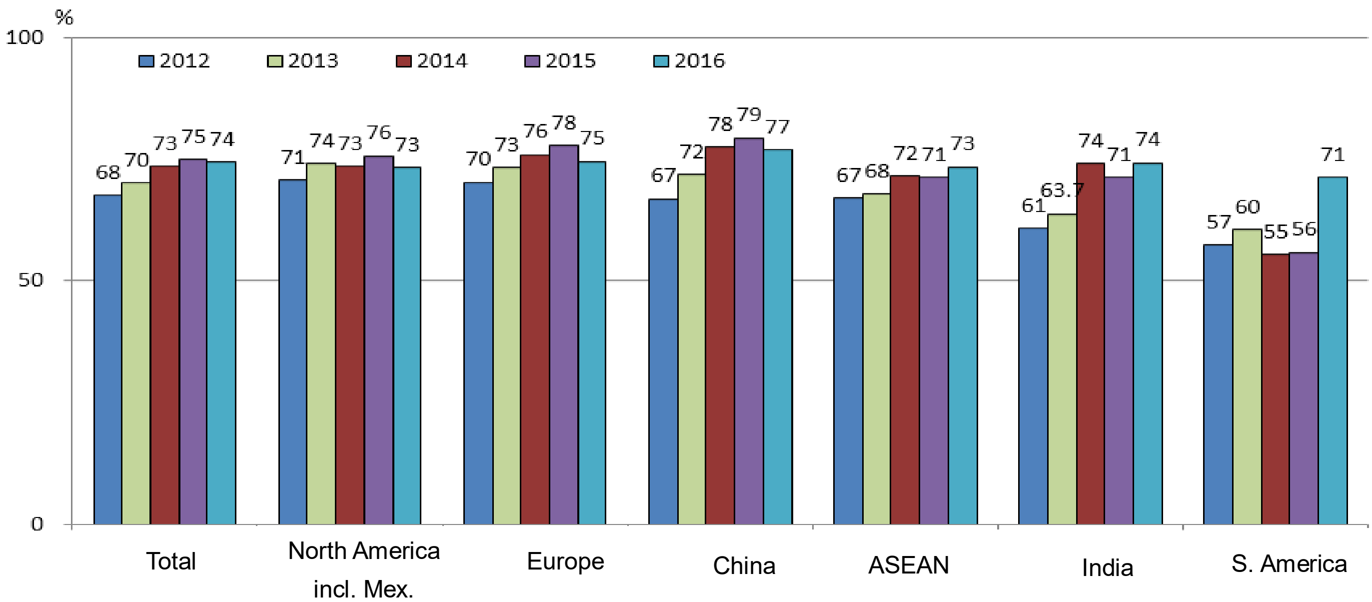
- Ratio of companies in the surplus cumulatively by region



- Ratio of the companies with dividend by region

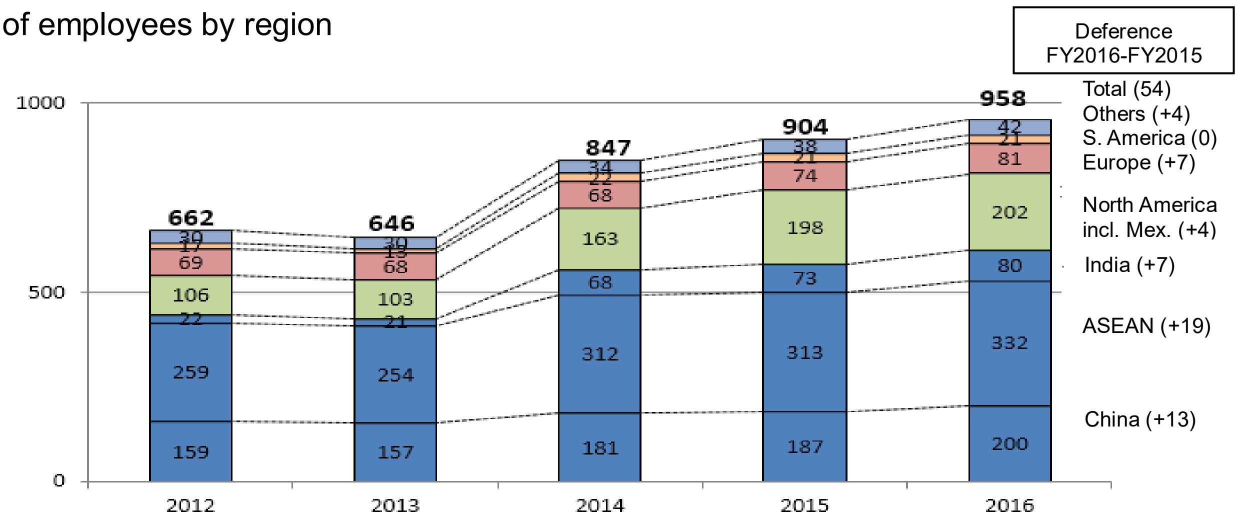


- Local contents by region

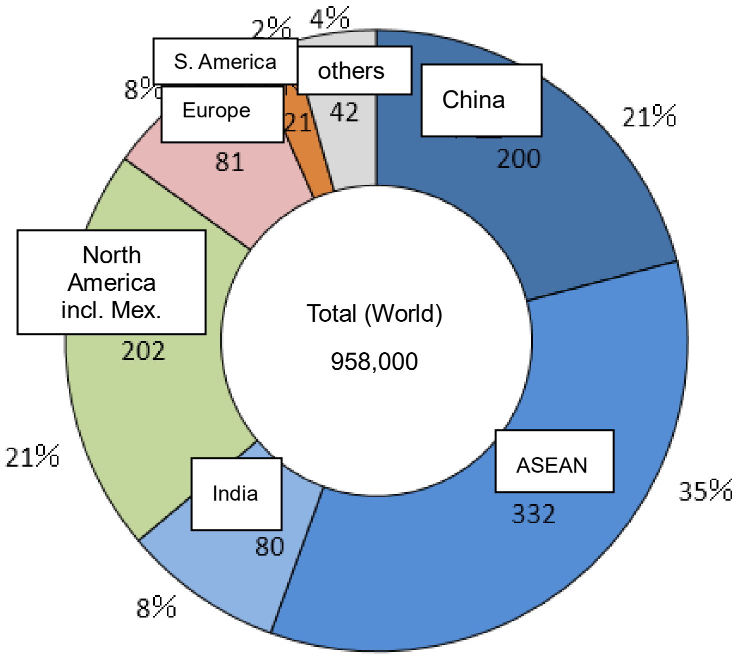


The local contents have risen in ASEAN, India and South America, keeping around 74% overall.

- No. of employees by region



◆ No. of employees by region (composition ratio in FY 2016)



- Sales per employee by region (FY 2016)