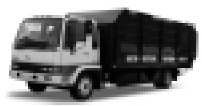
JAMA Canada

2001 ANNUAL REVIEW

2001/2002 Model Year Vehicles Sold in Canada, Including Country of Manufacture

Hino

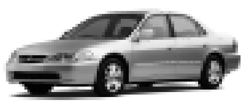

FB Model Class 5 Japan

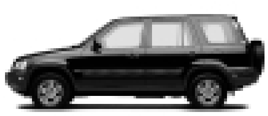

FD Model Class 6 Japan


SG Model Class 7 Japan

Honda


Accord Coupe U.S.


Accord Sedan U.S.


CRV Japan


Insight Japan

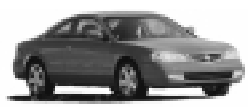

Odyssey Canada

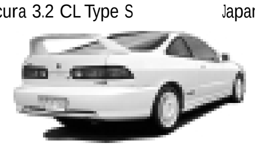

Prelude Japan


S2000 Japan


Civic Sedan Canada


Civic Coupe U.S.


Acura 3.2 CL Type S Japan


Acura Integra Type R Japan


Acura NSX-T Japan


Acura 3.5 RL Japan


Acura 3.2 TL U.S.


Acura 1.7 EL Canada


Acura RSX (2002) Japan


Acura MDX Canada

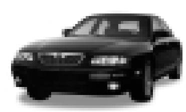
Mazda


Tribute U.S.


626 U.S.


B3000/4000 U.S.


Miata Japan

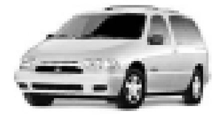

Millenia S Japan


MPV Japan


Protegé Japan


Protegé 5 Japan

Nissan


Quest U.S.


Sentra Mexico


Sentra SE-R Mexico


Xterra U.S.

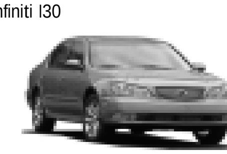

Altima U.S.


Frontier Crew Cab U.S.


Maxima Japan


Pathfinder Japan


Infiniti I30 Japan


Infiniti I35 Japan

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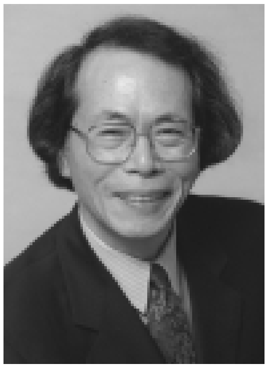
JAMA Canada

2001 Annual Review

I Chairman's Report



It is a great pleasure, as the Chairman of JAMA Canada, to be publishing our 2001 Annual Review of the industry in Canada. JAMA Canada was established in 1984 to promote greater understanding on economic and trade issues in the motor vehicle sector. We hope this report will contribute to this objective.

Industry Overview in 2000

For JAMA Canada members as a group, 2000 surpassed all of the records set in previous years with respect to vehicle production, export of finished vehicles and sales in Canada, creating our best overall performance to date. Units sales of all JAMA Canada members reached a new peak of 384,000 in 2000 surpassing the previous sales record of 365,000 units in the previous year. What's more, production of vehicles at three assembly plants in Canada surpassed 620,000 units in 2000, while exports of finished vehicles rose to a record 494,000 units.

The reason for this record performance lies in a combination of factors which include strong consumer confidence, low unemployment, low interest rates, stable prices (notwithstanding fluctuations in gasoline prices) as well as an ongoing need to replace older vehicles in Canada.

Production at three Japanese affiliated plants in Canada (Honda in Alliston, Toyota in Cambridge and CAMI in Ingersoll) reached a record 620,000 units in 2000 as a result of robust markets in North America. And due to high levels of integration in North America, about 80% of total output was exported. Most exports went to the United States, while more than 27,000 units were shipped to third countries, including 3,900 minivans which were exported to Japan.

Looking at overall performance as a group, Japanese automakers produce well over one vehicle in Canada for every one sold here, and we export from Canada more vehicles than we import from Japan, the US and Mexico combined. In fact, during the past eight years, over 1.1 million more vehicles have been exported from plants in Canada than have been imported from Japan, the US and Mexico combined. When all current expansions are fully operational in 2003, total production capacity will reach 770,000 units annually, about double our current level of sales in Canada.

There have been remarkable and dramatic changes since the mid-1980's when Japanese automakers began to establish manufacturing in Canada, and the continuing growth in vehicle and parts production in Canada is a clear and unequivocal vote of confidence in the future of the Canadian auto industry.

Highlights of 2000

Among the key events of last year, JAMA Canada participated in the 23rd Canada Japan Business Conference that was held in Tokyo, including the Automotive Sector meeting that was hosted by Honda at the Twin Ring Hotel and racing grounds at Motegi, northwest of Tokyo.

The association also continued the liaison and communication activities that were transferred from PAC in 1997. These activities included assisting the APMA (Automotive Parts Manufacturers' Association of Canada) and CAMI with arrangements that brought Mr. Doug Fallow, Vice-President, Manufacturing, CAMI Automotive Inc., to Hamilton Ontario as a Speaker for a panel discussion at the 2000 APMA Annual Conference & Exhibition.

In October, JAMA Canada hosted a reception on the occasion of Mr. Takao Suzuki's first official visit to Canada as President and Vice Chairman of the Japan Automobile Manufacturers Association in Tokyo.

With respect to trade policy issues in 2000, the WTO Dispute Settlement Panel that was established to investigate 'certain measures affecting the automotive industry in Canada', issued its final report in February 2000. The WTO decision was upheld in appeal and the Canadian Government decided to accept the ruling and would undertake measures to repeal the Auto Pact by February 19, 2001. For our part, while JAMA Canada issued a statement in support of the action by the Government to adjust trade policies to treat all automakers equally, we were disappointed that the Canadian Government chose not to eliminate most-favoured nation (MFN) tariffs on finished vehicles for the benefit of both automakers and consumers in Canada. At the current time, Canada's MFN tariff applied to passenger vehicles, while modest by international comparison, is higher at 6.1% than either the US at 2.5% or Japan at 0%.

Further details, including auto industry facts and figures are contained in this report as well as on our recently re-designed website at 'www.jama.ca'.

On behalf of the members of JAMA Canada, I hope this annual review will be useful in understanding the activities and views of the Japanese auto industry in Canada. We welcome any comments, suggestions or questions.

Yoshio Nakatani
Chairman

Introduction

The Japan Automobile Manufacturers Association of Canada is a non-profit trade association established in 1984 to promote greater understanding on economic and trade matters pertaining to the motor vehicle industry and to encourage closer cooperation between Canada and Japan. JAMA Canada's members include the following companies who import, distribute, manufacture and export automotive products:

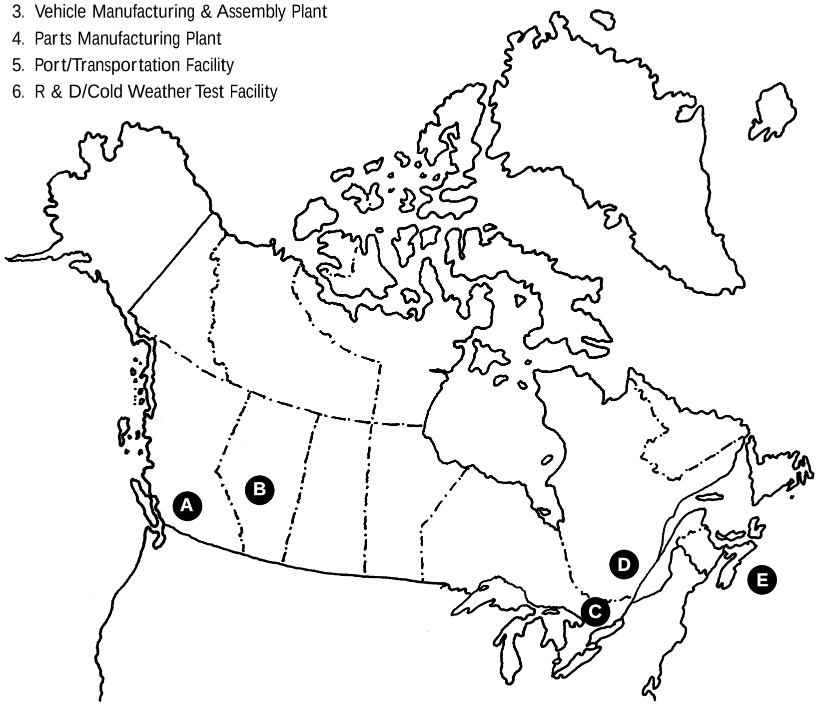
Hino Diesel Trucks (Canada) Ltd., Honda Canada Inc., Honda of Canada Manufacturing, Mazda Canada Inc., Nissan Canada Inc., Subaru Canada Inc., Suzuki Canada Inc., Toyota Canada Inc., and Toyota Motor Manufacturing Canada Inc.

As a group, JAMA Canada members have become an integral part of the Canadian auto industry that makes a significant and growing contribution to Canada:

- Through several billions of dollars in direct investment, joint ventures and industrial cooperation in vehicle and parts manufacturing;
- Through the current direct employment of over 19,000 Canadians at motor vehicle and auto parts manufacturing operations;
- Through the export of about 80% of vehicle production to the U.S. and other foreign countries, which adds to Canada's trade balance;
- Through our members' presence in the Canadian market for over thirty years which has helped to stimulate competition for the benefit of Canadian consumers.
- Through manufacturing investment, forging a hybrid of Canadian and Japanese business and industrial culture; and through a growing array of supplier relationships helping Canadian industry be globally competitive through the diffusion of both product and process technologies;

JAMA Canada Members' Operations in Canada

Type of operation:
1. Head Office
2. Regional Office/Parts Distribution Warehouse
3. Vehicle Manufacturing & Assembly Plant
4. Parts Manufacturing Plant
5. Port/Transportation Facility
6. R & D/Cold Weather Test Facility



A British Columbia		B Alberta		C Ontario		D Quebec		E Nova Scotia	
Hino	2,5	Toyota	2	Hino	1,2	Honda	2	Honda	2,6
Honda	2,5			Honda	1,2,3,5	Mazda	2	Toyota	2
Mazda	2,5			Mazda	1,2	Nissan	2		
Nissan	2,5			Nissan	1,2	Subaru	2		
Suzuki	2,5			Subaru	1,2	Suzuki	2		
Toyota	2,4,5			Suzuki	1,2,3,5	Toyota	2		
				Toyota	1,2,3,5,6				

- Through an extensive distribution, sales and service network employing over 30,000 Canadians from Newfoundland to British Columbia.

Contributions to the Canadian Economy

1. Consumer Benefits

In pursuit of satisfying the ever demanding consumer, Japanese automakers have stimulated competition and raised the quality of vehicles not only made in Japan, but increasingly vehicles designed and developed in North America for the Canadian and U.S. markets. For all automakers, quality is a necessary ingredient just to be able to participate in an increasingly competitive global industry. But for JAMA Canada members, quality is a constantly moving target, driven by the demands of the consumer, lower costs and continuous improvement. What's more, about three of every five Japanese brand vehicles currently sold in Canada are built in North America. As such, the benefits to local communities and local suppliers in Canada continues to grow, particularly as capacity in Canada expands to 770,000 units by 2003.

2. Employment

The Japanese-affiliated auto industry in Canada is multi-faceted and in the aggregate, employs about 51,000 Canadians in manufacturing both parts and vehicles, imports, exports, transportation, distribution, sales and service.

In the manufacturing sector, more than 8,600 Canadians work in three motor vehicle manufacturing plants, and about 11,000 jobs have been created in Canada through various parts and materials operations supplying the North American auto industry. Expanding manufacturing investments at Honda of Canada Manufacturing and Toyota Motor Manufacturing Canada will create new jobs directly, plus significant indirect employment as a result of increasing local sourcing of supplies and services. There are about 30,000 Canadians employed in about 1,000 dealerships according to the Canadian Association of Japanese Automobile Dealers (CAJAD). Finally, there are about 1,725 people employed in the national distribution and head offices of JAMA Canada members.

Several of our member companies maintain regional offices and warehouses in different regions of Canada including Western Canada, Ontario, Quebec and the Maritime region. Two member companies run operations in Canada related to vehicle engineering, design and testing. These R&D activities focus primarily on vehicle and component cold weather testing in Timmins, Ontario and in Halifax, Nova Scotia.

3. Investments in Manufacturing

There are three vehicle manufacturing plants and currently thirty-nine Japanese affiliated auto parts and related materials and machine tool operations in Canada. Total investment in vehicle manufacturing will reach over $5.0 billion by 2003, when current expansions will be complete.

Honda Canada announced in 1995 a $300 million minivan plant in Alliston, Ontario that opened in 1998 with a two-shift capacity of 120,000 units and an additional 1,200 associates. The new plant started production of the Odyssey minivan in 1998. The plant added a second shift in mid-1999 to reach projected capacity. Honda Canada also added 60,000 units of capacity in 2000 with the start of production of the MDX luxury sport utility vehicle under the Acura brand.

In 1997, Toyota opened their $600 million plant in Cambridge, Ontario which increased capacity by 120,000 units and an additional 1,200 team members. TMMC continues to make 4 door Corollas and 1.8L four cylinder engines for the Corolla and officially began assembly of the Camry Solara in September, 1998. TMMC will also produce about 6,000 convertible models of the Camry Solara annually starting in 2000, and will invest $650 million to produce the first Lexus vehicle outside of Japan in 2003, the Lexus RX300, a luxury sport utility vehicle. With this investment, TMMC will add 20,000 units of capacity and 300 new jobs.

CAMI Automotive, the 50/50 joint venture manufacturing plant established by Suzuki and General Motors of Canada in Ingersoll, started production of the new compact sport utility vehicle (SUV) in October 1998 - the Suzuki Vitara and the Chevrolet Tracker. Since start-up in 1989, CAMI has built two different vehicles, a sub-compact passenger car, the Suzuki Swift and the Chevrolet Metro, along with the compact SUV.

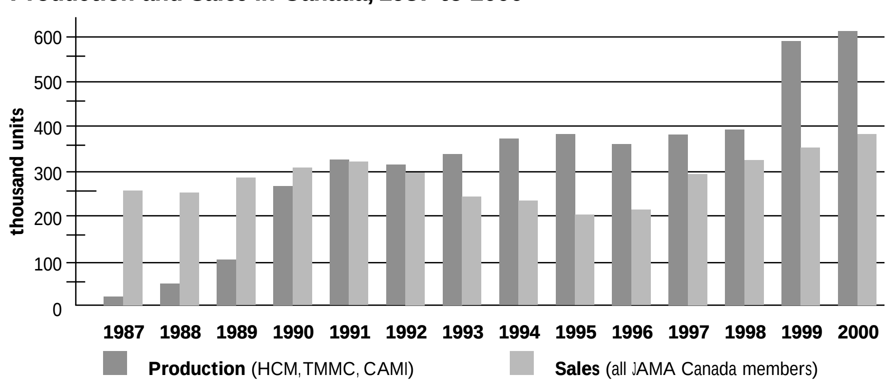
When these expansions are complete, Japanese/Canadian vehicle manufacturing will have a potential production capacity of 770,000 units, and a workforce of over 9,000 Canadians at Honda, Toyota and CAMI. Canada is currently the exclusive location for the production of the Honda Odyssey, Acura MDX, Acura 1.7EL and the Toyota Camry Solara, including coupe and convertible models.

In 2000, Japanese automakers manufactured about 3.2 million vehicles in North America. Canadian plants built almost 621,000 units or 19.4% of total Japanese affiliated production in the US and Canada.

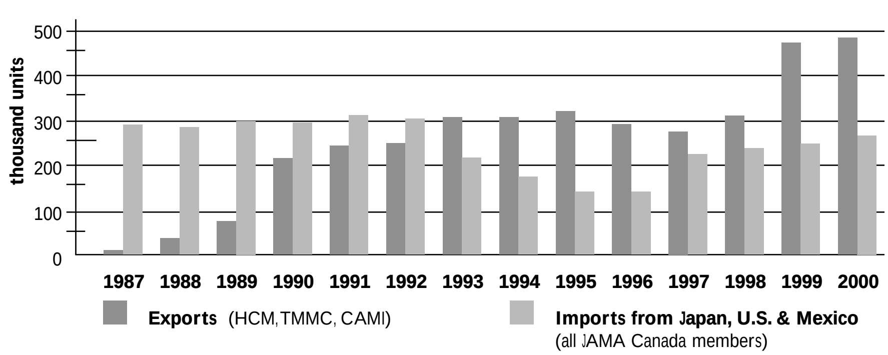
Comparing exports and imports of vehicles in 2000, for the eighth consecutive year Canada has been a net exporter of "Japanese" vehicles. Imports from Japan, the US and Mexico totalled 275,000 units, while 494,000 vehicles were exported, thereby contributing to Canada's trade balance.

Comparing production and sales in Canada, there were about 1.6 vehicles produced in Canada for each one sold by all JAMA Canada members combined. At the same time, all vehicles that were exported to the US met the NAFTA rule of origin requirements for North American content.

Production and Sales in Canada, 1987 to 2000



Canadian Exports and Imports, 1987 to 2000



Production in Canada:

While total motor vehicle production in Canada slid to below 3 million units in 2000, largely as a result of production adjustments at Big 3 plants during the last quarter of 2000, output for the three Japanese affiliated plants (Honda, Toyota and CAMI) was up over 1999, but individually mixed.

Honda in Alliston hit a new production record with over 326,800 units as a result of strong demand in North America for the Odyssey minivan as well as the combined launch last fall of the new Acura MDX sport utility vehicle and the new 2001 Civic.

On the other hand, production at both Toyota and CAMI were lower than the previous year. TMMC output was cut by 13.0% to 183,740 units, while CAMI produced 110,444 units, down 5.1% largely due to the fact that some production models, such as the Toyota Corolla and the Suzuki Swift/Chevrolet Metro, were nearing the end of their product cycles.

Expansions announced in the past year are expected to be completed over the next year or so. HCM output in 2001 will likely reach full capacity of 350,000 units due to strong demand for the new Acura MDX, the new Civic and the Odyssey minivan. TMMC is expected to launch the new Corolla in early 2002, together with the new Matrix crossover vehicle. Capacity at TMMC will expand to 220,000 units with the addition of the Matrix next year and the Lexus RX300 in 2003. Last fall, CAMI announced that it will stop production of subcompact passenger cars in the spring of 2001, a move that had been expected. CAMI will continue to produce the popular sport utility vehicles, Vitara and Tracker for the North American market, and the two-door Grand Vitara for export to 26 countries around the world.

Canadian Vehicle Exports & Imports

Every year since 1993, Canada has been a net exporter of Japanese related vehicles. In fact, over the past eight years, over 2.8 million vehicles have been exported from Canada to the US and several other countries, while 1.7 million vehicles were imported from Japan, the US and Mexico by all JAMA Canada members.

In 2000, HCM shipped a record 255,714 units, up 20.9% over 1999; TMMC exported 138,657 units, 17.7% fewer than the previous year; and CAMI's exports dipped 2.0% to 100,159 units as a result of lower output. Overall export shipments rose 2.6% to 494,530 units for the calendar year, up over 12,000 units from 1999.While the majority of exported vehicles are destined for the US, more than 27,100 units were shipped to more than two dozen countries including 3,900 Odyssey minivans that were exported to Japan.

Imports from Japan, the US and Mexico rose 8.0% in 2000 to a total of 275,653 units as a result of higher shipments of vehicles originating in the two NAFTA partners. Finished vehicle shipments from Japan were almost unchanged from the previous year, up slightly 0.4% to 167,894 units, while shipments from the US & Mexico gained 22.4% to 107,759 units in 2000.

Sales in Canada

As a group, JAMA Canada members sold 5.1% more light vehicles in 2000 than the previous year. Light vehicle sales reached a new high of 383,173 units, almost 18,500 more than in 1999. Passenger car sales climbed 6.2% to 282,666 units, while the tally for light trucks stood at 100,507 units for the calendar year. Light vehicle market share for all JAMA Canada members rose to 24.7% in 2000. Passenger car share reached 33.3%, while the light truck share was up to 14.4%.

Among individual companies, Honda Canada was the top seller in 2000 (the Honda Civic was the top selling model in Canada for the third year in a row) with record sales of 134,919 units, up 2.7% from last year. Mazda Canada took the top honours in terms of year over year growth, as sales climbed 26.1% to 52,070 units. Nissan Canada was not far behind with sales growth of 25.1% over last year with total sales of 47,404 units. Subaru Canada also turned in a solid performance, up 12.2% to a new record level of 14,609 units in 2000. Toyota Canada and Suzuki Canada both had lower sales in 2000, down 4.8% and 5.7% respectively.

In the medium and heavy truck market, the slump in the heavy duty Class 8 market and the alarming rise in fuel costs had some impact on the mid-level truck market as well. Hino Diesel Trucks Canada sells medium duty trucks aimed primarily at the service sector. In 2000, Hino recorded their second best year for retail sales with 788 units sold. Hino's market share of the mid-range diesel truck market stands at 13% in Canada. The outlook for 2001 remains fairly optimistic, in keeping with the Canadian auto industry in general, where a slight downturn is expected after five years of strong growth.

Sales by Company

	2000	1999	% Change
Honda	**134,919**	**131,403**	**2.7**
Passenger Cars	106,814	104,427	2.3
Light Trucks	28,105	26,976	4.2
Toyota	**123,596**	**129,865**	**-4.8**
Passenger Cars	95,023	94,214	0.9
Light Trucks	28,573	35,651	-19.9
Mazda	**52,070**	**41,279**	**26.1**
Passenger Cars	35,876	31,955	12.3
Light Trucks	16,194	9,324	73.7
Nissan	**47,404**	**37,900**	**25.1**
Passenger Cars	30,170	21,587	39.8
Light Trucks	17,234	16,313	5.6
Suzuki	**10,575**	**11,212**	**-5.7**
Passenger Cars	4,785	4,955	-3.4
Light Trucks	5,790	6,257	-7.5
Subaru	**14,609**	**13,018**	**12.2**
Passenger Cars	9,997	8,917	12.1
Light Trucks	4,612	4,101	12.5
Hino	**788**	**810**	**-2.7**
Medium-duty Trucks	788	810	-2.7
Total Vehicles	**383,961**	**365,487**	**5.1**
Passenger Cars	282,665	266,055	6.2
Light Trucks*	101,296	99,432	1.9

*Includes Hino (medium-duty) Source: AIAMC, JAMA Canada

Production

	2000	1999	1998*	1997*	1996*	1995*	1994*	1993*	1992*	1991*
Honda (HCM)	326,804	274,908	179,751	165,181	144,482	106,133	108,308	100,996	104,123	99,150
Toyota (TMMC)	183,740	211,081	171,739	108,252	97,344	90,136	85,870	79,219	68,092	67,834
CAMI*	110,444	113,400	45,000	110,000	124,000	184,000	170,000	162,000	147,000	160,000
Total	**620,988**	**599,389**	**396,490**	**383,433**	**365,826**	**380,269**	**364,178**	**342,215**	**319,215**	**326,984**
% Change	3.6%	51.2%	3.4%	4.8%	-3.8%	4.4%	6.4%	7.2%	-2.4%	19.3%

*estimated

Source: JAMA Canada

Exports

	2000	1999	1998*	1997*	1996*	1995*	1994*	1993*	1992*	1991*
Honda (HCM)	255,714	211,535	144,544	121,248	112,999	88,117	90,427	82,535	76,287	79,220
Toyota (TMMC)	138,657	168,463	130,021	73,855	67,153	67,151	65,935	70,889	52,373	47,970
CAMI*	100,159	102,200	38,000	97,000	117,000	165,000	153,000	150,000	121,000	113,000
Total	**494,530**	**482,198**	**312,565**	**292,103**	**297,152**	**320,268**	**309,362**	**303,424**	**249,660**	**240,190**
% Change	2.6%	54.3%	7.0%	-1.7%	-7.2%	3.5%	2.0%	21.5%	3.9%	9.0%

*estimated

Source: JAMA Canada

Imports from Japan

	2000	1999	1998	1997	1996	1995	1994	1993	1992	1991
Passenger Cars	167,000	166,262	144,922	140,189	69,647	69,712	105,268	155,978	243,055	246,411
Trucks	894	917	833	846	644	3,410	9,371	18,776	32,461	41,217
Total	**167,894**	**167,179**	**145,755**	**141,035**	**70,291**	**73,122**	**114,639**	**174,754**	**275,516**	**287,628**
% Change	0.4%	14.7%	3.3%	100.6%	-3.9%	-36.2%	-34.4%	-36.6%	-4.2%	1.0%

Source: JAMA

Imports from U.S./Mexico (NAFTA)

	2000	1999	1998	1997	1996	1995	1994	1993*	1992*	1991*
Passenger Cars	75,383	58,049	76,990	75,915	67,586	64,577	61,852	40,200	31,500	22,300
Trucks	32,376	29,974	23,826	18,892	10,697	11,929	10,051	-	-	-
Total	**107,759**	**88,023**	**100,816**	**94,807**	**78,283**	**76,506**	**71,903**	**40,200**	**31,500**	**22,300**
% Change	22.4%	-12.7%	6.3%	21.1%	2.3%	6.4%	78.9%	27.6%	41.3%	47.7%

*estimated

Source: JAMA Canada

JAMA Canada Members' Sales in Canada

	2000	1999	1998	1997	1996
Passenger Cars	**282,665**	**266,055**	**246,335**	**226,023**	**182,745**
Japan Built	108,307	105,955	98,536	65,065	48,323
N.A. Built	174,358	160,100	147,799	160,958	134,422
Light Trucks	**100,508**	**98,622**	**83,123**	**71,033**	**35,485**
Japan Built	56,676	55,485	53,863	53,256	22,396
N.A. Built	43,832	43,137	29,260	17,777	13,089
Total Light-Duty Vehicles	**383,173**	**364,677**	**329,458**	**297,056**	**218,230**
Japan Built	164,983	161,440	152,399	118,321	70,719
N.A. Built	218,190	203,237	177,059	178,735	147,511

Refer to website for more information - www.jama.ca

Source: AIAMC, JAMA Canada

HONDA of CANADA MFG (HCM)

Location:	Alliston, Ontario
Start-up:	November, 1986
Investment:	$1.3 billion
Vehicles Built:	Civic 4 door, Acura 1.7EL, Odyssey minivan, Acura MDX
Employment:	4,000
Production:	326,800 - 2000
Export:	255,700 - 2000
Ttl. New Capacity:	350,000 - 2001

TOYOTA MOTOR MANUFACTURING CANADA (TMMC)

Location:	Cambridge, Ontario
Start-up:	November, 1988
Investment:	$2.2 billion
Vehicles Built:	Corolla - 4 door, Camry Solara, coupe & convertible
Employment:	2,700
Production:	183,700 - 2000
Export:	138,700 - 2000
Ttl. New Capacity:	220,000 - 2003
Engine Assembly:	1.8L 4cyl

CAMI AUTOMOTIVE (SUZUKI/GM CANADA)

Location:	Ingersoll, Ontario
Start-up:	April, 1989
Investment:	$1.0 billion
Vehicle:	Suzuki Vitara / Chevrolet Tracker
Employment:	1,900
Production:	110,444 - 2000
Export:	100,159 - 2000
Ttl. Capacity	200,000

Summary of Key Statistics:

Total Japanese investment in vehicle manufacturing by 2003	$5.0 billion +
Employment:	51,000 +
1. Manufacturing: Motor Vehicles	8,600
Auto Parts & Materials Plants (est.)	11,000
2. National Sales/Distribution	1,725
3. Dealerships (est. CAJAD)	30,000
Unit Production, 2000	620,988
Unit Exports, 2000	494,530

Unit Imports, 2000	275,653
from Japan	167,894
from US/Mexico	107,759
Light Vehicle Sales, 2000	383,173
Medium/Heavy Duty Truck Sales, 2000	788
Total JAMA Canada Vehicle Sales in Canada, 2000	383,961
JAMA Canada members market share, 2000	24.7%
Passenger car share	33.3%
Light truck share	14.4%

Japanese Automakers' North American Manufacturing Operations

Canada

A CAPTIN
(Toyota)
Delta, B.C.
Wheels

B HONDA
Alliston, Ontario
Cars, Minivans
SUV

C TOYOTA
Cambridge,
Ontario
Cars, engines
SUV in 2003

D CAMI
(Suzuki/GM)
Ingersoll, Ontario
Cars, SUVs

U.S.

E AUTOALLIANCE
(Mazda/Ford)
Flat Rock, Michigan
Cars

F MITSUBISHI
Normal, Illinois
Cars

G SUBARU-ISUZU
Lafayette, Indiana
Cars, Trucks

H HONDA
Marysville, East Liberty,
& Anna, Ohio
Cars, motorcycles, engines
and major parts

I TOYOTA
Princeton, Indiana
Trucks, SUV
and major parts

J TOYOTA
Georgetown, Kentucky
Cars, Minivans, engines

K TOYOTA
Buffalo, West Virginia
engines, transmissions

L NISSAN
Smyrna, Tennessee
Cars, Trucks, SUVs,
Decherd, Tennessee
engines and axles

M HONDA
Lincoln, Alabama
Minivan/SUV, engines
(start-up in 2001)

N NUMMI (Toyota/GM)
Fremont, California
Cars, Trucks

O NISSAN
Canton, Mississippi
Pick-up, SUV, Minivan in 2003

P TOYOTA
Huntsville, Alabama
V8 Engines in 2003

Mexico

Q NISSAN
Aguascalientes, Ags.
Cars

R HONDA
Jalisco
Cars,
Motorcycles/parts

S NISSAN
Cuernavaca,
Morelos
Cars, Trucks

Canada

CAMI Automotive Inc.
Purchasing Dept.
300 Ingersoll Street, P.O. Box 1005
Ingersoll, Ontario
N5C 4A6
Tel: 519-425-3125
Fax: 519-425-3100

Honda of Canada Mfg.
Purchasing Div.
4700 Tottenham Road, P.O. Box 5000
Alliston, Ontario
L9R 1A2
Tel: 705-435-5561 (ext. 2148/2096)
Fax: 705-435-0990

Toyota Motor Mfg. Canada Inc.
Purchasing Dept.
1055 Fountain Street North
P.O. Box 5002
Cambridge, Ontario
N3H 5K2
Tel: 519-653-1111 (ext. 2639)
Fax: 519-653-2514

U.S.A.

AutoAlliance International, Inc.
(Mazda-Ford Joint Venture)
Purchasing Dept.
1 International Drive
Flat Rock, Michigan 48134-9498
U.S.A.
Tel: 734-782-7321
Fax: 734-782-7680

Honda of America Mfg., Inc.
Purchasing Dept.
21001-A State Route 739
Raymond, Ohio 43067
U.S.A.
Tel: 937-644-0455 (ext. 7403)
Fax: 937-645-7401/7402

Isuzu Motors America, Inc.
Purchasing Dept.
46401 Commerce Centre Drive
Plymouth, Michigan 48170-2473
U.S.A.
Tel: 734-455-7595
Fax: 734-455-7581

Mitsubishi Motor Mfg. of America
Purchasing Dept.
100 North Mitsubishi Motor Parkway
Normal, Illinois 61761
U.S.A.
Tel: 309-888-8507
Fax: 309-888-8154

Mitsubishi Motors America, Inc.
Purchasing Dept.
4300 Varsity Drive
Suite E
Ann Arbor, Michigan 48108
U.S.A.
Tel: 734-973-4441
Fax: 743-973-4469

New United Motor Mfg. Inc. (NUMMI)
(Toyota-GM Joint Venture)
Purchasing Dept.
45500 Fremont Boulevard
Fremont, California 94538
Tel: 510-498-5500
Fax: 510-770-4010

Nissan North America, Inc.
Purchasing Strategic Planning
39001 Sunrise Drive
Farmington Hills, Michigan 48331-3487
U.S.A
Tel: 248-488-3816
Fax: 248-488-3916

Nissan Trading Corp., U.S.A.
(export to Japan)
Sales Dept.
34405 West Twelve Mile Rd., Suite 225
Farmington Hills, Michigan 48331
U.S.A
Tel: 248-489-5656 (ext. 217)
Fax: 248-489-5660

Subaru of America
Parts Dept.
Subaru Plaza
P.O. Box 6000
Cherry Hill, New Jersey 08034-6000
U.S.A.
Tel: 856-488-8500
Fax: 856-488-0485

Subaru-Isuzu Automotive, Inc.
Purchasing Dept.
5500 State Road 38 East
Lafayette, Indiana 47903
U.S.A.
Tel: 765-449-1111
Fax: 765-449-6017

Toyota Motor Manufacturing North America, Inc.
Purchasing Planning
25 Atlantic Avenue, P.O. Box 18579
Erlanger, Kentucky 41018
Tel: 859-746-4000
Fax: 859-746-4595

Japanese Automotive-Related Investment and Joint Ventures in Canada

Company	Location	Province	Type of Venture	Number of Employees	Year Operational
AUTOMOTIVE PARTS MANUFACTURERS					
NTN Bearing Mfg. Canada Radial ball-bearings	Mississauga	ON	D	135	1973
Canadian Autoparts Toyota Inc. (CAPTIN) Aluminum wheels	Delta	BC	D	230	1984
F & P Mfg. Inc. Engine & rear suspension parts,engine support, rear axles, pedal/clutch assemblies, bumper beams & seat frames	Tottenham	ON	J	500	1986
Quality Safety Systems Co. (QSS) Active seat belt systems; Plastic parts & sub-assemblies	Tecumseh	ON	J	900	1986
Meritor Suspension Systems Co. Suspension components & systems (coil springs, stabilizer bars & torsion bars)	Chatham/ Milton	ON ON	J	560	1986
Waterville TG Inc. Door sealing systems (weatherstripping)	Waterville	PQ	D	1,400	1986
General Seating of Canada Ltd. Automotive seating systems; side impact door beams	Woodstock	ON	J	185	1987
Nichirin Inc. Hose & tube assemblies for brake/clutch/power steering systems	Brantford	ON	D	260	1987
DDM Plastics Inc. Plastic bumpers & parts, instrument panels	Tillsonburg	ON	J	700	1988
TS Tech Canada Inc. Seat & tire assemblies	Newmarket	ON	D	300	1988
Vuteq Canada Inc. Auto glass assembly, door trim, softops & sunvisors	Woodstock	ON	D	300	1989
Bridgestone/Firestone Canada Radial tires; tire cord	Mississauga/ Woodstock/ Joliette	ON ON QUE	D	2,075	1990
Yachiyo of Ontario Mfg. Inc. Gas tanks, body parts, sunroof parts, glass holders front & rear frames & door hinges	Barrie	ON	D	300	1990
Freudenberg-NOK Gaskets (rocker cover, electrical sealing & extrusion) cam cover seals, fuel system parts & silicone molded parts	Tillsonburg	ON	J	200	1991
Omron Dualtec Automotive Electronics Inc. (Relay Div.) Auto relays, flashers, modules & switches	Oakville	ON	D	302	1991
Alcoa-Fujikura Mfg., Ltd. (AFL) Wiring harnesses	Owen Sound	ON	J	110	1995
Craft Originators Inc. Labels, emblems	Hamilton	ON	D	90	1995
Intertec Systems Instrument panels, air bag door covers & small plastic parts	St. Marys	ON	J	185	1995
Listowel Technology Inc. Injection moulded plastic parts	Listowel	ON	D	70	1997
Sumi-Canada Wiring Systems Ltd. Wiring harnesses	Mississauga	ON	J	100	1997
AP Cantech Inc. Automotive glass	Bradford	ON	J	48	1998
Dyna-Mig Mfg. of Stratford Inc. Underbody/suspension parts (frames, suspension arms, pedal assemblies)	Stratford	ON	D	180	1998
HiSAN of Canada, Ltd. Fuel and brake lines	Orangeville	ON	J	53	1998

Japanese Automotive-Related Investment and Joint Ventures in Canada

Company	Location	Province	Type of Venture	Number of Employees	Year Operational
AUTOMOTIVE PARTS MANUFACTURERS					
Jefferson Elora Corp. (JEC) Body components (dashboard panels, pillars)	Elora	ON	J	108	1998
KTH Shelburne Mfg. Inc. Automotive frame components	Shelburne	ON	J	325	1998
Kumi Canada Corporation Fenders, column covers	Bradford	ON	J	150	1998
Musashi Auto Parts Canada Inc. Suspension components	Arthur	ON	D	150	1998
Nagata Auto Parts Canada Co., Ltd. Door hinges	London	ON	D	50	1998
Denso Manufacturing Canada Inc. (DMCN) Air conditioners	Guelph	ON	D	170	1999
Omron Dualtec Automotive Electronics (Switch/ECU Div.) Switch/Electrical Control Unitswindows, instrument panels, (switch assemblies for power seats/ moon roof limit switches, other micro-switch based assemblies)	Oakville	ON	D	200	1999
Showa Canada Inc. Shock absorbers, brake and rear suspension components, drive shafts	Schomberg	ON	D	76	1999
YM Technology Inc. Dies and tools	Elmira	ON	J	15	1999
Waterville TG Inc. Door sealing systems (weatherstripping) & warehouse	Petrolia	ON	D	200	2000
NEWLY ANNOUNCED:					
Ube Automotive North America Sarnia Plant, Inc. Aluminum wheels	Sarnia	ON	D	250	Jan. 2002
TG Minto Corporation Plastic interior & exterior components console box, instrument panels, etc.	Minto	ON	D	40	Dec. 2001
MATERIALS AND MACHINE TOOLS					
Sanyo Canadian Machine Works Inc. Automated assembly line systems	Elmira	ON	D	60	1982
Aclo Compounders Inc. Plastic compound (thermoplastic)	Cambridge	ON	J	85	1986
Canada Mold Technology Inc. Plastic injection molds	Woodstock	ON	J	55	1989
Z-Line (Stelco Inc.) Zinc alloy plating	Hamilton	ON	J	55	1990
DNN Galvanizing Galvanized steel	Windsor	ON	J	100	1993
Monzen Steel Inc. (c/o Nissho Iwai) Automotive steel coil processing	Ingersoll	ON	J	20	1996

Summary of Investments	Automotive Parts	Materials & Machine Tools	Total	Total Employees
J - Joint Venture	15	5	20	4,454
D - Direct Investment, wholly-owned	18	1	19	6,548
(Excludes Newly Announced)	33	6	39	11,002

In 2000, vehicle production slipped below 3 million units, including heavy duty vehicles, after record output in 1999 of 3.05 million vehicles. Combined light and heavy duty vehicle sales in Canada rose 3.0% to 1,585,088 units, a new record that surpassed the previous high set in 1988 of 1,562,670 units. In 2000, Canadian vehicle production exceeded consumption by a margin of almost 2 to 1.

Production

Total vehicle output in Canada ended the year down 2.7% at 2,965,183 units including 46,287 medium and heavy duty trucks. Plants in Canada trimmed output in the 4th quarter of 2000 in response to a sudden downturn in demand in the US where more than 85% of all vehicles made in Canada are exported. Nevertheless, 2000 was the second best year on record. In terms of light vehicle production, passenger car output fell 4.6% to 1,551,452 units, while light trucks were relatively flat at 1,367,444 units, down 0.2% over 1999.

Shipments

Shipments of all automotive products totalled C$103.4 billion in 2000, the second highest tally on record and virtually unchanged from C$103.6 billion in the previous year. According to Statistics Canada, motor vehicle manufacturers' shipments reached a total of C$69.7 billion, down slightly from C$70.3 in 1999; and auto parts and accessories manufacturers' shipments grew 1.2% to C$33.7 billion from the year before.

Sales

Overall light duty vehicle sales rose 3.2% to a record 1,549,441 units in 2000. Passenger car sales increased 5.3% to 849,103 units, while light trucks gained only 0.8% to 700,338 units. Passenger cars accounted for 54.8% of the total, up from 53.7% in 1999. Heavy duty truck sales declined 2.8% to 37,130 units from the previous year. While Class 5 and 6 vehicles managed strong gains in 2000, sales in the largest segment, Class 8 vehicles, dropped almost 10% compared to 1999.

Canadian Automotive Trade Statistics, 2000

All countries

Overall, the auto trade surplus in 2000 dropped a little more than 5% to just under C$17 billion. Total exports were up 0.5% to C$94.3 billion, but imports gained 1.9% to C$77.3 billion. On the one hand, finished vehicle imports jumped 7.4% over 1999 due to strong demand particularly in the first half of 2000; while on the other, vehicle shipments slid 1.2% primarily as a result of 4th quarter production cutbacks of trucks by the Big 3. With respect to auto parts, exports increased 5.6% to a record level of C$24.6 billion, while imports of auto parts fell 1.8% in value to C$44.9 billion in 2000. The huge surplus in assembled vehicles was reduced by 7.6% to C$37.2 billion, while the smaller, but still significant, trade deficit in parts was trimmed by 9.5% to C$20.3 billion.

Japan

With respect to trade with Japan, the value of finished vehicle imports rose 10.4% to C$3.7 billion (although unit imports were up only marginally), while parts imports were flat, resulting in a 6.9% increase in overall automotive imports to C$5.5 billion. Exports of vehicles and parts from Canada fell 2.3% to C$186 million in 2000. With imports outpacing exports, Canada's auto trade deficit continued to climb in 2000, up 7.3% to C$5.3 billion, with almost all of the increase attributed to finished vehicles. Offsetting the trade deficit with Japan is the growing surplus in automotive exports to the U.S. from plants in Canada.

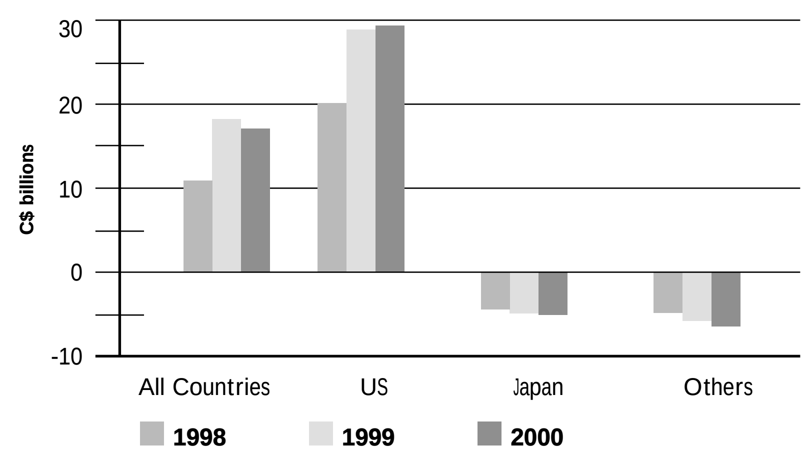
US

In trade with the US, exports were unchanged at C$91.9 billion and imports were down less than 1% to C$62.2 billion. Overall, in 2000 Canada had a C$45.8 billion trade surplus in assembled vehicles, offset somewhat by a C$16.1 billion deficit in auto parts. The overall surplus rose 2.0% in 2000 to C$29.7 billion.

Other

Canada's auto trade deficit with all other countries jumped 18.5% to C$7.4 billion as a result of a 20.5% increase in auto related imports, led by finished vehicles which soared 36.1% to C$5.6 billion over the past year. Exports from Canada also made impressive gains in 2000, up 27.9% overall, entirely due to a 55.6% gain in auto parts exports to C$1.6 billion.

Canadian Automotive Trade Balance (Vehicles & Parts)



The Year in Perspective

In 2000, the Japanese economy continued to struggle to find some relief from a decade of economic malaise through ongoing deregulation, reforms and economic stimulus programs. Despite these efforts, consumer confidence in Japan has yet to significantly recover, the Nikkei stock market index fell back significantly later in the year, just as the US economy turned down sharply in the 4th quarter, creating a further chill in many major economies.

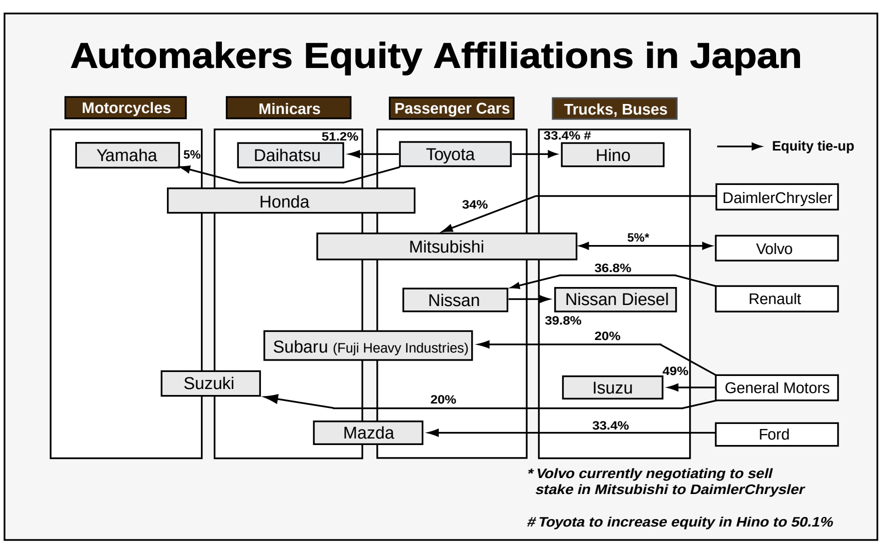
While the Japanese government continued to seek appropriate reforms and implement further deregulation, restructuring in the auto sector continued to move ahead, as international alliances among Japanese and other international automakers continued to deepen and demonstrate positive results. One example is the return of Nissan to profitability, somewhat ahead of schedule as outlined by Nissan's President, Carlos Ghosn, in 1999.

Among other things, strategic alliances including equity and other business tie-ups are a clear indication of the continuing restructuring and internationalization of the auto industry, as well as the increase in both global competition and global cooperation. Consolidation is also growing rapidly among auto parts suppliers on a global basis.

The signs of recovery in the auto industry in Japan, while not dramatic, were nonetheless evident in the year end tally that showed overall vehicle production had increased 2.5%, exports had edged up 1.0% and new vehicle sales had grown by 1.7% in 2000. After 1999 production fell below 10 million units for the first time in 20 years, output reached just over 10.1 million units in 2000. Sales of new vehicles in the domestic market recorded a small gain but fell short of 6 million units for the third consecutive year. Import vehicle sales did not fare as well, slipping 1.0% to 275,400 units.

The Outlook for 2001

Despite the continued sluggishness of the Japanese economy, members of JAMA are reasonably bullish about their prospects for 2001. Demand for their products in Japan is forecast to increase 2.2% over 2000 to a total volume of 6.1 million units. The optimism stems in part from indications that Japanese consumers are ready to begin buying again. Personal earnings have improved and there is a growing desire to replace aging vehicles with new models. Japanese car-buying consumers want to have the latest technological enhancements, including greater fuel efficiency.



"Japan's economy until very recently was supported largely by government stimulus measures and increases in exports," said Hiroshi Okuda, Chairman of JAMA. "The past year saw year-on-year growth in domestic sales for the first time in four years."

Hiroshi Okuda
Chairman, JAMA

In addition to increased consumer confidence and spending, the industry itself made changes that will allow it to take full advantage of the economic recovery. Automakers made capital improvements and invested in new technology. They also cut procurement and manufacturing costs. "We should take advantage of these trends to ensure that a full-fledged recovery gets underway," Okuda added. "At the same time, we will continue to work with the government on taxation issues and the relaxation of regulations," to further promote growth in the industry.

Industrial restructuring will continue as companies balance global competition and international cooperation while meeting the ever demanding needs of the consumer. Automakers are aggressively introducing new eco-friendly models, such as hybrid (gas/electric) vehicles and direct injection engines. In October, the 2001 Tokyo Motor Show will feature a future-oriented showcase of new automotive technology and design, particularly in the areas of safety, environmentally-friendly low emission vehicles and alternative fuel technologies, as well as intelligent transportation systems (ITS).

In the face of many challenges in the years ahead, Japanese automakers will continue to focus on three key activities: revitalization of domestic demand, environmental protection and vehicle safety and the growing need for global harmonization of automotive standards and technical regulations.

Motor Vehicle Production

Year	Cars	% Chg.	Trucks	% Chg.	Buses	% Chg.	Total	% Chg.
2000	8,363,485	3.3	1,726,818	-1.2	54,544	12.7	10,144,847	2.5
1999	8,100,169	0.6	1,746,912	-9.8	48,395	-15.0	9,895,476	-1.5
1998	8,055,763	-5.1	1,937,076	-20.0	56,953	-8.5	10,049,792	-8.4
1997	8,491,440	8.0	2,421,413	-0.3	62,234	17.1	10,975,087	6.1
1996	7,864,676	3.3	2,428,897	-4.3	53,126	12.4	10,346,699	1.5
1995	7,610,533	-2.5	2,537,737	-6.1	47,266	-3.8	10,195,536	-3.4
1990	9,947,972	9.9	3,498,639	-11.0	40,185	-4.5	13,486,796	3.5
1985	7,646,816	8.1	4,544,688	5.2	79,591	10.2	12,271,095	7.0

Note: Percentage figures represent the change from the preceding year.
Source: Japan Automobile Manufacturers Association.

Motor Vehicle Exports

Year	Cars	% Chg.	Trucks	% Chg.	Buses	% Chg.	Total	% Chg.
2000	3,795,854	1.0	617,870	0.8	41,163	7.3	4,454,887	1.0
1999	3,757,460	2.0	613,113	-22.9	38,380	-21.5	4,408,953	-2.6
1998	3,684,430	2.9	795,528	-13.5	48,917	-10.4	4,528,875	-0.5
1997	3,579,131	25.1	919,469	13.9	54,602	24.5	4,553,202	22.7
1996	2,860,080	-1.2	807,508	-5.0	43,866	-1.9	3,711,454	-2.1
1995	2,896,216	-13.8	849,859	-17.2	44,734	-39.2	3,790,809	-15.0
1990	4,482,130	1.8	1,309,121	-9.4	39,961	13.7	5,831,212	-0.9
1985	4,426,762	11.2	2,238,104	8.0	65,606	16.7	6,730,472	10.2

Note: Percentage figures represent the change from the preceding year.
Source: Japan Automobile Manufacturers Association.

New Motor Vehicle Registration

Year	Cars	% Chg.	Trucks	% Chg.	Buses	% Chg.	Total	% Chg.
2000	4,259,788	2.5	1,686,554	-0.4	16,571	14.5	5,962,913	1.7
1999	4,154,084	1.5	1,692,654	-4.5	14,478	2.4	5,861,216	-0.3
1998	4,093,148	-8.9	1,772,136	-20.1	14,141	-10.3	5,879,425	-12.6
1997	4,492,006	-3.8	2,217,257	-7.3	15,763	-8.5	6,725,026	-5.0
1996	4,668,728	5.1	2,391,790	-0.5	17,227	-0.4	7,077,745	3.1
1995	4,443,906	5.6	2,403,825	4.6	17,303	-3.0	6,865,034	5.2
1990	5,102,659	15.9	2,649,909	-6.3	24,925	-5.9	7,777,493	7.2
1985	3,104,083	3.3	2,431,178	4.7	21,573	6.4	5,556,834	2.2

Note: 1. Figures include imported vehicles. 2. Percentage figures represent the change from the preceding year.
Sources: Japan Automobile Dealers Association, Japan Mini-Vehicles Association.

Exports by Destination

	1985	1990	1995	1996	1997	1998	1999	2000
Asia	710,587	569,143	616,027	620,016	606,389	264,987	290,436	410,590
Middle East	401,598	283,866	206,446	284,881	346,154	455,159	308,114	295,176
Europe	1,363,694	1,750,497	918,831	948,712	1,254,879	1,370,931	1,329,216	1,136,085
(EU)	(995,489)	(1,484,588)	(792,058)	(801,858)	(1,025,688)	(1,132,535)	(1,154,992)	(973,078)
North America	3,384,562	2,521,823	1,301,218	1,169,073	1,412,055	1,459,338	1,723,598	1,836,941
(U.S.A.)	(3,131,997)	(2,236,988)	(1,228,096)	(1,098,504)	(1,271,095)	(1,313,583)	(1,556,419)	(1,669,047)
Central and South America	290,417	216,375	329,064	279,641	437,848	450,128	277,825	298,801
Africa	137,729	129,278	137,718	134,027	174,325	170,836	131,489	110,218
Oceania	426,075	344,236	274,828	265,478	310,776	347,194	337,288	357,739
Others	15,810	15,994	6,676	9,626	10,776	10,302	10,987	9,337
Total	6,730,472	5,831,212	3,790,808	3,711,454	4,553,202	4,528,875	4,408,953	4,454,887

Source: Japan Automobile Manufacturers Association

New Registrations of Imported Vehicles

Types of Vehicles	1995	1996	1997	1998	1999	2000
Foreign Manufacturers						
Passenger cars	260,389	311,279	294,890	242,407	245,510	247,799
Trucks	20,933	25,535	19,382	9,619	6,654	7,673
Buses	13	29	9	39	17	10
Sub-total	281,335	336,843	314,281	252,065	252,181	255,482
Japanese Manufacturers*						
Passenger cars	101,876	82,113	46,605	23,441	25,926	19,968
Trucks	4,951	8,569	3,996	363	118	2
Sub-total	106,827	90,682	50,601	23,804	26,044	19,970
Total						
Passenger cars	362,265	393,392	341,495	265,848	271,436	267,767
Trucks	25,884	34,104	23,378	9,982	6,772	7,675
Buses	13	29	9	39	17	10
Grand Total	388,162	427,525	364,882	275,869	278,225	275,452
% Chg.	28.8	10.1	-14.7	-24.4	0.9	-1.0

Note: Percentage figures represent the changes from the preceding year.

*Vehicles produced overseas by Japanese manufacturers.

Source: Japan Automobile Importers Association

IV Information Services

I) Publications

a) JAMA Canada
- Auto Quarterly (English & French)
- JAMA Canada Annual Review (English & French)
- JAMA Canada Report (Japanese - bimonthly)

b) JAMA
- Japan Auto Trends (quarterly - available on the internet at www.jama.org)
- JAMA Forum
- Motor Vehicle Statistics of Japan (annual)
- Motor Industry of Japan (annual)
- other special publications

While some publications have limited circulation, please contact JAMA Canada about current availability.
Tel. 416-968-0150
Fax. 416-968-7095
Email: jama@jama.ca

II) Videos

Several videos on the auto industry in Japan are available for short term loan. Videos are about 20-30 minutes in length on VHS cassettes. Please contact JAMA Canada for further details.

III) Internet Websites

- JAMA Canada- www.jama.ca
- JAMA (US)-www.jama.org
- JAMA (Japan)- www.jama.or.jp/e_press/index.html

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Hino Diesel Trucks (Canada) Ltd.
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L5T 1J5

JAMA Canada

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Chairman
Yoshio Nakatani

Treasurer
Mamoru Yoshida

Corporate Secretary
David Worts

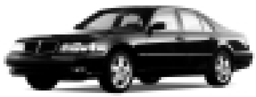
Japan Automobile Manufacturers Association of Canada

Suite 460
151 Bloor Street West
Toronto, Ontario
M5S 1S4
Telephone (416) 968-0150
Fax (416) 968-7095
Email: jama@jama.ca

2001/2002 Model Year Vehicles Sold in Canada, Including Country of Manufacture

Nissan

Continued from inside front cover


Infiniti Q45 Japan

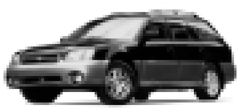

Infiniti QX4 Japan


Infiniti G20 Japan

Subaru


Legacy Sedan U.S.


Legacy Wagon U.S.


Outback U.S.


Outback Sedan U.S.


Forester Japan


Impreza Japan


Impreza WRX Japan

Suzuki


4 Door Vitara Canada


Vitara Convertible Canada


Grand Vitara V6 Japan


XL-7 Japan


Esteem Sedan Japan


Esteem Wagon Japan


Swift Canada

Toyota


Camry U.S.


Camry Solara Canada


Camry Solara Convertible Canada


Echo Japan


Highlander Japan


Prius Japan


RAV4 Japan


Sequoia U.S.


Sienna U.S.


Tacoma U.S.


Celica Japan


Matrix (2003 model) Canada (in 2002)


Corolla Canada


Avalon U.S.


Tundra U.S.


4 Runner Japan


Lexus LX 470 Japan

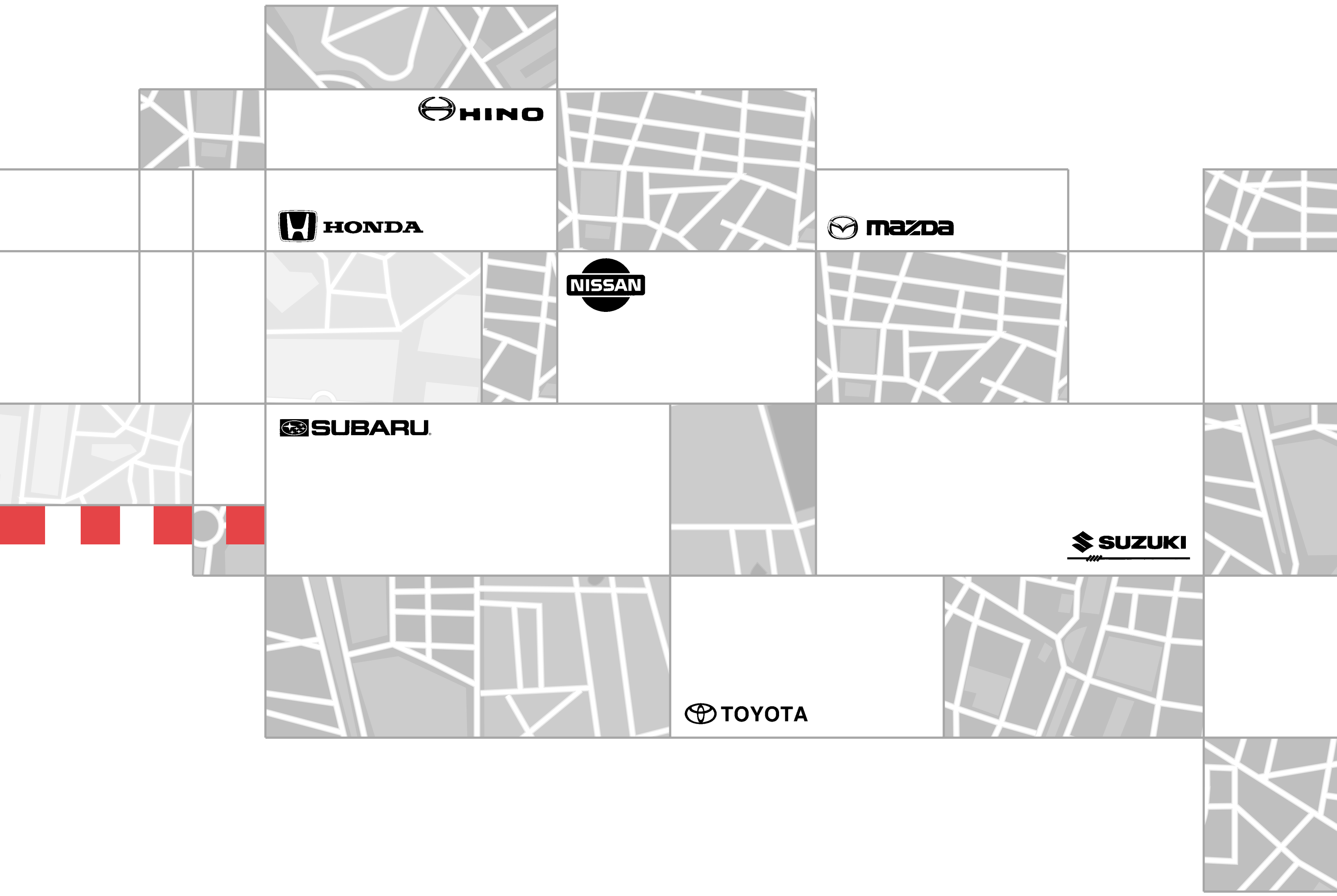

Lexus RX 300 Japan (Canada in 2003)


Lexus ES 300 Japan


Lexus GS 430 Japan


Lexus LS430 Japan


Lexus SC 430 Japan



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