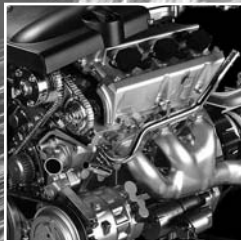
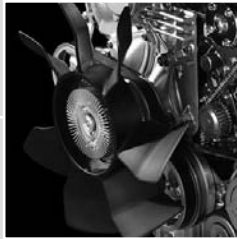


JAMA  Canada



20
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ANNUAL
REVIEW





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04

Japan Automobile Manufacturers
Association of Canada

ANNUAL REVIEW

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It is a great pleasure, as the Chairman of JAMA Canada, to be publishing our 2004 Annual Review of the Japanese affiliated auto industry in Canada, as we celebrate the 20th anniversary of the association. JAMA Canada was established in 1984, and continues to promote greater understanding on economic and trade issues in the motor vehicle sector.

The Chairman's Report

While total vehicle sales in Canada softened last year, 2003 was nevertheless a remarkably good year for production, exports and sales of "Japanese" vehicles in Canada. This year was notable for the production launch of the first Lexus vehicle to be made outside of Japan, the Lexus RX 330 at Toyota Motor Manufacturing Canada (TMMC) in Cambridge. At the same time, three new auto parts plants officially began production in Ontario, including FIO Automotive Canada in Stratford, Aisin Canada in Woodstock, and Trim Masters in Elmira.

For the sixth consecutive year, Japanese automakers in Canada sold an all-time record number of new vehicles, up 1.5% from the previous record of 483,000 units in 2002 to 494,000 in 2003, which lifted our market share from 28.3% to 31.0%.

What's more, combined production of vehicles at three Japanese-affiliated assembly plants in Canada rose 4.0% to almost 671,200 units, a jump of almost 30,000 units over the previous year. As with other automakers in Canada, the majority of vehicles made in Canada are exported. Total exports were over 510,000 units, a new record level of international shipments from Canada. While over 75% of vehicles were shipped to markets in the US, over 33,000 were exported to more than a dozen other countries, including Japan.

This record breaking performance was supported by a combination of factors including a wide array of new models, a broader choice of vehicles to meet various transportation needs, continuing confidence of the Canadian consumer, a strong work force, low interest rates, and an ongoing need to replace an aging fleet in Canada.

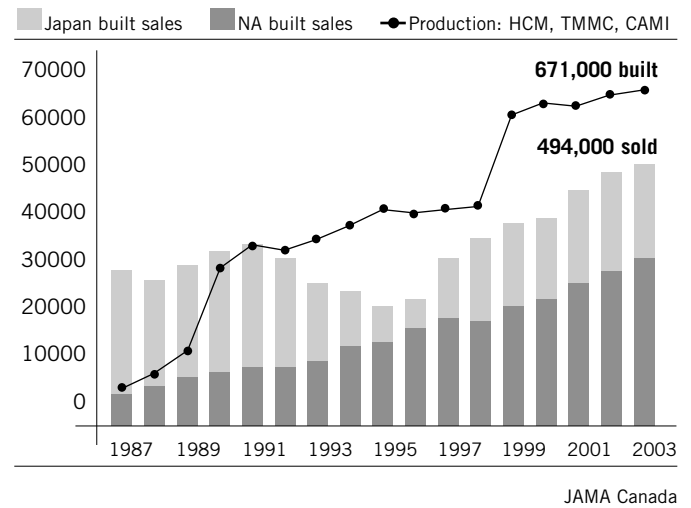
Snapshot of the Industry, 2003

Investment in vehicle manufacturing	\$6.13 billion
Employment:	56,000 +
1. Manufacturing: Motor Vehicles	10,400
Auto Parts & Materials Plants (est.)	14,110
2. National Sales/Distribution	1,800
3. Dealerships (est.)	30,000
Production, 2003 (HCM, TMMC, CAMI)	671,248
Exports, 2003 (HCM, TMMC, CAMI)	510,575
Imports, 2003 (all members)	345,231
from Japan	192,230
from US/Mexico	153,001
Light Vehicle Sales, 2003	493,983
Medium/Heavy Duty Truck Sales, 2003	1,116
Total Vehicle Sales in Canada, 2003	495,099
JAMA Canada members market share, 2003	31.0%

Looking at overall performance as a group, Japanese automakers produced about 1.4 vehicles in Canada for every one sold here in 2003, and we exported from Canada over 150,000 more vehicles than were imported from all countries. In fact, during the past eleven years, over 1.5 million more vehicles have been exported from plants in Canada than have been imported from Japan, the US and Mexico combined.

Vehicle Production & Sales in Canada

1987-2003



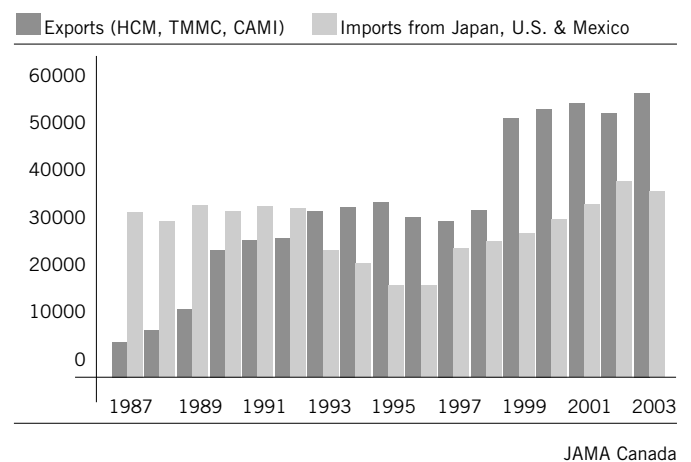
Highlights of the past year

As JAMA Canada heads into our 20th year of operation, a quick glance backward reveals remarkable and dramatic changes since the mid-1980's when Japanese automakers and auto parts makers began to establish manufacturing plants in Canada. Moreover, the continuing growth in vehicle and parts production in Canada is a clear and unequivocal vote of confidence in the long term future of the Canadian auto industry.

For the Japanese-affiliated auto sector in Canada, Honda and Toyota continue to increase their capacity in Canada due to strong consumer demand in North America, while a number of new auto parts plants are being built as a result of expanding business opportunities.

Vehicle Exports & Imports in Canada

1987-2003



Overall, change is one of the constant features of the auto industry in Canada and around the world. What's more, the auto industry continues to be transformed by globalization. The ongoing restructuring is a challenge for both industry and government which includes closer international cooperation and increasing global competition.

JAMA Canada members are prepared to support Canadian Government initiatives to assist the auto industry enhance its competitive edge and create a more attractive investment environment through a number of non-discriminatory, forward-looking recommendations in areas where auto industry stakeholders have a shared concern:

- improvements in infrastructure, including highways and border crossings, with the key focus on the primary crossing at Windsor-Detroit
- eliminate capital taxes, federally and provincially, which will enhance the competitive environment for investment
- create a viable plan through balanced policy measures that will allow Canada to meet its Kyoto Protocol commitments
- international harmonization of technical standards and regulations
- enhance skills training and education needed to sustain a globally competitive automotive industry
- encourage innovation through enhanced R&D incentives as well as establish easier access to these incentives

With a long-term and growing commitment to Canada and Canadian consumers, Japanese affiliated automakers and parts makers have become an integral part of the economic and social fabric of Canada. Further details, including auto industry facts and figures are contained in this report as well as on our website at 'www.jama.ca'.

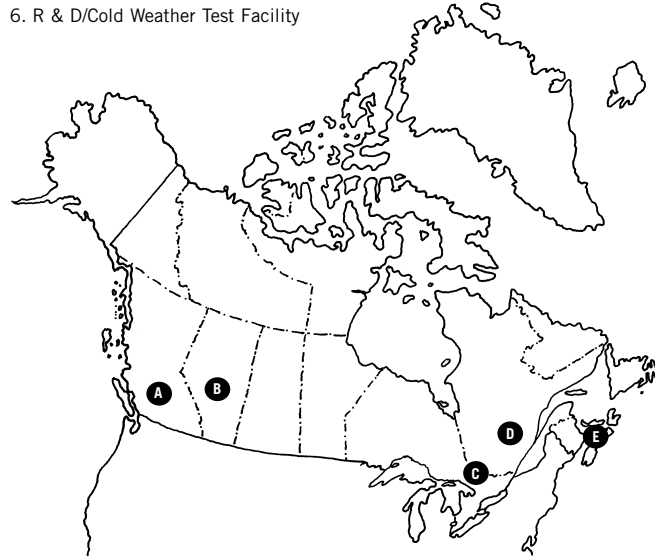
On behalf of the members of JAMA Canada, I hope this annual review will be useful in understanding the activities and views of the Japanese auto industry in Canada. We welcome any comments, suggestions or questions.

Kenji Tomikawa
Chairman

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	Hino 2	Honda 2,6
Honda 2,5	Nissan 2	Honda 1,2,3,5	Honda 2	Toyota 2
Mazda 2,5		Mazda 1,2	Mazda 2	
Nissan 2,5		Nissan 1,2	Nissan 2	
Suzuki 2,5		Subaru 1,2	Subaru 2	
Toyota 2,4,5		Suzuki 1,2,3,5	Suzuki 2	
		Toyota 1,2,3,5,6	Toyota 2	

The Industry in 2003

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.

Contributions to the Canadian Economy

(i) 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 component of global competitiveness. 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 840,000 units in 2003. In addition, according to recent industry and consumer surveys, vehicles designed, manufactured and sold by our member companies still represent the leading edge in terms of reliability, performance and customer satisfaction.

(ii) Employment

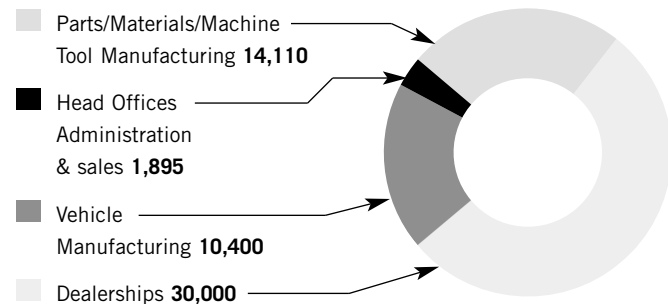
The Japanese-affiliated auto industry in Canada is multi-faceted and in the aggregate, employs about 56,000 Canadians in manufacturing both parts and vehicles, imports, exports, transportation, distribution, sales and service.

In the manufacturing sector, more than 10,400 Canadians work in three motor vehicle manufacturing plants, and over 14,000 jobs have been created in Canada through various parts and materials operations supplying the North American auto industry. There are about 30,000 Canadians employed in about 1,000 dealerships. Finally, there are about 1,895 people employed in the national distribution and head offices of JAMA Canada members.

Employment

2003

Total Employment in Canada over 56,000



Japan Automobile Manufacturers Association of Canada

Vehicle Manufacturing Operations



Civic



Acura 1.7 EL



Odyssey



Acura MDX



Pilot

HONDA of CANADA MFG (HCM)

Location:	Alliston, Ontario
Start-up:	November, 1986
Investment:	\$1.73 billion
Vehicles Built:	Civic 4 door, Acura 1.7EL, Odyssey Minivan, Acura MDX, Honda Pilot
Employment:	4,300
Production:	392,230 - 2003
Export:	318,500 - 2003
Ttl. Capacity:	390,000



Corolla



Matrix



Lexus RX 330

TOYOTA MOTOR MANUFACTURING CANADA (TMMC)

Location:	Cambridge, Ontario
Start-up:	November, 1988
Investment:	\$2.9 billion
Vehicles Built:	Corolla, Matrix - North Plant Lexus RX330 - South Plant
Employment:	4,200
Production:	227,540 - 2003
Export:	147,800 - 2003
Ttl. New Capacity:	250,000
Engine Assembly:	1.8L 4cyl



Vitara



Tracker



Equinox

CAMI AUTOMOTIVE (SUZUKI/GM CANADA)

Location:	Ingersoll, Ontario
Start-up:	April, 1989
Investment:	\$1.5 billion
Vehicles Built:	Suzuki Vitara & Chevrolet Tracker, Chevrolet Equinox (Feb. 2004)
Employment:	1,900
Production:	51,475 - 2003
Export:	44,240 - 2003
Ttl. Capacity:	200,000

Several of our member companies maintain regional offices and warehouses in different regions of Canada including Western Canada, Ontario, Quebec and the Maritime region. Some 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.

(iii) Investments in Manufacturing

There are three vehicle manufacturing plants and currently forty-six Japanese affiliated auto parts and related materials and machine tool operations in Canada. Total investment in vehicle manufacturing alone will reach over \$6 billion when current programs are fully operational.

The Year in Review

Production in Canada:

Production at HCM in Alliston and TMMC in Cambridge has been growing due to expansions in capacity. Overall output, including CAMI, increased 4.0% to 671,200 units in 2003 a record level. Both HCM and TMMC reached their own production records - 392,200 and 227,500 units respectively. While CAMI output shrank to just over 51,000 units, production of the new 2005 Equinox, a compact sport utility vehicle, started in February 2004.

Since 1987, 6.4 million vehicles have been built in Canada at Honda, Toyota and CAMI plants, and 5.1 million of those have been exported to over a dozen countries around the world including Japan. What's more, these three production facilities accounted for 26.7% of total Canadian vehicle output last year, up from 5.4% in 1989.

Canadian Vehicle Exports:

As 76% of vehicles produced at HCM, TMMC and CAMI are exported, a record 510,575 units were shipped to the US and several other countries, an increase of 4.5% over 2002. While the majority of exports were destined for the US, about 34,000 went to more than a dozen other countries including 1,500 vehicles to Japan.

Based on preliminary data, once again Canada was a net exporter of 'Japanese' vehicles in 2003 as exports outstripped imports by more than 150,000 units. Exports have exceeded imports every year since 1993. In the past 11 years, over 1.5 million more vehicles have been shipped out of Canada than have been imported from Japan, the US and Mexico combined.

Vehicle Imports:

While vehicle imports to Canada fell 4.5% to 345,230 units in 2003, a growing number of vehicles were supplied from plants in North America as new capacity came on stream last year. This is clearly illustrated by the 18.1% drop in shipments from Japan and a 20.5% jump in vehicles shipped from Japanese affiliated plants in the NAFTA region including the US and Mexico. In the past year, both Nissan and Honda began production at major facilities in Mississippi and Alabama respectively. Nissan Mississippi plant builds the Quest minivan, the Titan pick-up truck and the Pathfinder Armada sport utility vehicle. Honda Alabama has taken over production in North America of the Odyssey minivan.

Sales by Company

	2003	2002	% Change
Honda	154,630	165,331	-6.5
Passenger Cars	113,530	121,328	-6.4
Light Trucks	41,100	44,003	-6.6
Toyota	165,024	152,766	8.0
Passenger Cars	119,959	113,693	5.5
Light Trucks	45,065	39,073	15.3
Mazda	65,550	71,140	-7.9
Passenger Cars	49,576	52,175	-5.0
Light Trucks	15,974	18,965	-15.8
Nissan	69,534	64,661	7.5
Passenger Cars	48,738	49,27	-1.1
Light Trucks	20,796	15,391	35.1
Suzuki	9,361	11,558	-19.0
Passenger Cars	4,878	5,983	-18.5
Light Trucks	4,483	5,575	-19.6
Subaru	15,762	17,236	-8.6
Passenger Cars	11,078	12,968	-14.6
Light Trucks	4,684	4,268	9.7
Hino	990	900	10.0
Medium-duty Trucks	990	900	10.0
MITSUBISHI	14,122	3,223	338.2
Passenger Cars	10,798	2,690	301.4
Light Trucks	3,324	533	523.6
Total Vehicles	494,973	486,815	1.7
Passenger Cars	358,557	358,107	0.1
Light Trucks*	136,416	128,708	6.0

* includes HINO (medium-duty)

Source: AIAMC, JAMA Canada

Sales in Canada:

Sales among all Japanese automakers in Canada increased 1.5% to 494,000 units in 2003. While car sales were flat, light trucks (including minivans, pickups and sport utility vehicles) jumped 6.0% over the previous year. From another perspective, sales of vehicles built in North America climbed 8.4%, while sales of imports from Japan dropped 6.7% from 2002. Clearly, this reflects the growth of production capacity in North America among Japanese automakers and the shift to sourcing vehicles within NAFTA. In fact, three out of every five vehicles sold by Japanese auto dealers in Canada are now built in North America. Market share of Japanese brands climbed above 30% for the first time to a new peak of 31%, a result of both higher sales and a falling market.

JAMA Canada members had 5 of the 10 top-selling passenger cars in 2003

Rank	Vehicle	Units Sold
#1	Honda Civic	63,898
#2	Toyota Corolla	48,676
#3	Chevrolet Cavalier	41,254
#4	Mazda Protegé	38,059
#5	Pontiac Sunfire	35,766
#6	Ford Focus	35,705
#7	Honda Accord	29,609
#8	Chevrolet Impala	25,028
#9	Toyota Echo	24,952
#10	Hyundai Accent	24,409

Among individual companies, while results were mixed, five companies reached new sales records - Toyota, Nissan, Mitsubishi, Hino and Mitsubishi Fuso (the latter two in the medium duty truck segment). Toyota Canada overtook Honda Canada for the top spot in 2003 with a new high of 165,024 sales, an 8.0% gain; while Honda sales were down 6.5% to 154,630 units. Nissan Canada pulled into third place up 7.5% to 69,534 vehicle sales, as Mazda Canada slipped 7.9% to 65,550. In spite of strong gains in light trucks, sales declined 8.6% for Subaru Canada, and Suzuki Canada sales fell 19.0% over 2002. Mitsubishi Motor Sales Canada finished their full calendar year with a total of 14,122 sales, just a little short of their first year target. In the commercial truck segment (medium and heavy duty), Hino Diesel Trucks Canada broke their previous record with a gain of 7.3% to 990 units. Mitsubishi Fuso Canada sales jumped 32.6% to 126 units in 2003.

Overview of the Canadian Auto Industry

Production:

Overall Canadian production of motor vehicles totaled 2.52 million units, off 3.0% from last year and down from the peak of 3 million in 1999. The closure of the GM plant in Quebec in 2002 and the Chrysler commercial van plant in Windsor in 2003 were major factors in the decline.

Shipments:

Shipments of all automotive products (vehicles, parts and accessories) slid 4.4% to \$94.1 billion in 2003. According to data from Statistics Canada, motor vehicle assembly shipments fell 5.0% to \$62.5 billion over 2002, while shipments of auto parts and accessories were 3.4% lower than last year at \$31.6 billion.

Sales:

Although total new vehicle sales in Canada dropped 6.4% to 1.59 million units, this was still the second best sales year on record. Altogether, sales of passenger cars in Canada slid 7.4% to 865,463 units, while light truck sales declined 5.3% to 728,043 units. The only sector that gained over last year was medium and heavy trucks which rose 7.2% to 34,364 units.

Furthermore, after six years of steady growth and three consecutive years of record breaking sales, the market was bound to take a breather. What forecasts did not anticipate however, were a series of unfortunate events

including SARS, which had a big impact in Toronto, an energy blackout in Ontario during the late summer, wildfires in western Canada and a crisis in the beef industry over a case of mad-cow disease (BSE) in Alberta. At the same time, in the face of intensifying competition in the market, many automakers continued to offer a wide variety of incentives which may have helped the market from falling more than it did.

The 'Big Three' automakers combined sales dropped 11.2% to 907,000 units. General Motors, Ford and the Chrysler Division of DaimlerChrysler all recorded lower sales led by Chrysler dropping 13.7% to 212,935 units. GM and Ford were down 12.5% and 6.3% respectively. Their combined market share also fell from 60.1% in 2002 to 56.9% in 2003 as GM gave up 2 points and Ford slipped just over 1 point.

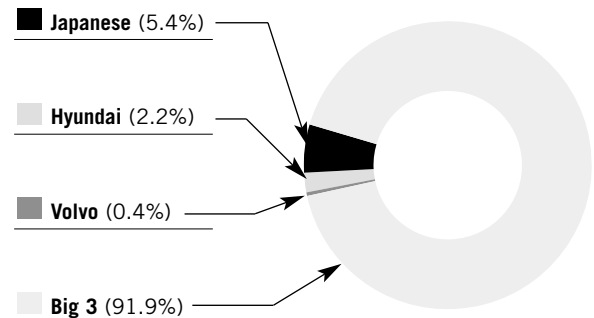
European automakers saw combined sales slip 2.0% in 2003, while Korean companies (only Hyundai and Kia as Daewoo closed their Canadian sales office last year) were unchanged over 2002. Both European and Korean automakers have about a 6% share of the Canadian light vehicle market.

Canadian Automotive Trade

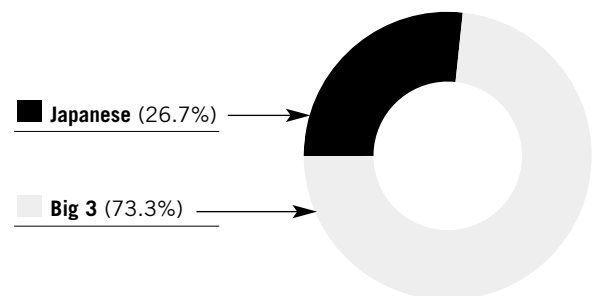
All countries: Overall, Canada's auto trade surplus in 2003 dropped 30.4% to \$7.9 billion from \$11.5 billion in the previous year. The value of vehicle and parts exports declined 9.2% as a result of lower production, while imports of parts and vehicles fell 6.3% compared to 2002. The trade surplus in finished vehicles stands at \$22.0 billion, down 25.3%, while the deficit in auto parts dropped 22.1% from \$18.1 billion to \$14.1 billion.

Light Vehicle Production in Canada

1989 – 1.9 million



2003 – 2.52 million



Source: Desrosiers/JAMA Canada

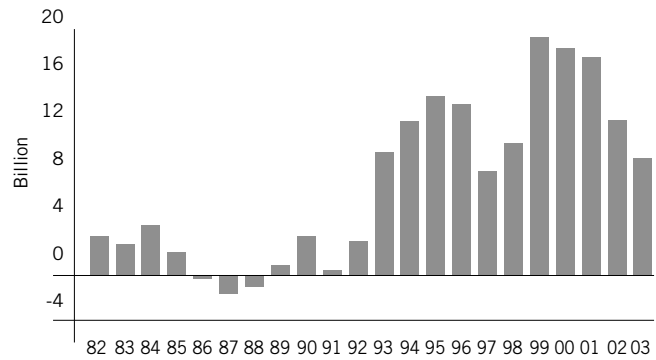
US: In trade with the US, the value of automotive exports lost 10.0% to \$81.3 billion, while imports decreased 7.2% to \$59.2 billion in 2003. Canada's trade surplus in assembled vehicles slipped 20.3% to \$32.6 billion, which was offset by smaller deficit in auto parts of \$10.4 billion, resulting in an overall trade surplus of \$22.2 billion, down 16.8% from 2002 at \$26.7 billion.

Japan: With respect to trade with Japan, the overall trade deficit shrunk 11.3% to \$5.67 billion as the value of imports of parts and finished vehicles dropped 11.4%. At the same time, automotive exports fell 15.3% to \$143 million in 2003. The decline in vehicle shipments from Japan to Canada was a result of new capacity coming on stream in North America.

Other: Auto trade with all other countries combined increased with respect to both exports and imports, up 22.9% and 1.9% respectively. Exports grew as a result of a 63.0% rise in the value of finished vehicle shipments, while imports of vehicles rose 3.6% and imported parts were down slightly. The overall auto trade deficit with all other countries was reduced by 3.4% to \$8.6 billion in 2003.

Canada's Automotive Trade Balance

With all countries (1982-2003)



Source: Statistics Canada

Industry Awards

2004 EnerGuide Awards for Most Fuel Efficient Vehicles

Vehicle	Category	Fuel Consumption
Honda Insight	Two-seater	City 3.9 L/100 km (72 mpg) Hwy 3.3 L/100 km (86 mpg)
Toyota Echo	Sub-compact	City 6.7 L/100 km (42 mpg) Hwy 5.2 L/100 km (54 mpg)
Honda Civic Hybrid	Compact	City 4.9 L/100 km (58 mpg) Hwy 4.6 L/100 km (61 mpg)
Toyota Prius	Mid-size	City 4.0 L/100 km (71 mpg) Hwy 4.2 L/100 km (67 mpg)
Toyota Matrix	Station Wagon	City 7.7 L/100 km (37 mpg) Hwy 6.0 L/100 km (47 mpg)
Mazda B2300	Pick-up Truck	City 10.0 L/100 km (28 mpg) Hwy 7.4 L/100 km (38 mpg)

Natural Resources Canada

2004 Automotive Journalists Association of Canada (AJAC) Awards

Category	Winner
Car of the Year	Mazda3
Economy Car	Mazda3
Family Car	Mazda6
Minivan	Toyota Sienna
SUV	Subaru Forester 2.5 XT
Sports/Performance Car	Mazda RX-8
Sports Coupe (under \$35000)	Mazda3 Sport Hatchback
Sports Coupe (over \$35000)	Infiniti G35 Coupe
MPV / Crossover	Infiniti FX 45

AJAC Awards are determined by AJAC automotive journalists as a result of a four-day test comparing new or substantially new 2004 model year vehicles at Shannonville Motorsport Park in Belleville, Ontario.

2004 CAA Pyramid Awards

Category	Winner
Environmental Initiatives Award	Toyota Canada - 2004 Prius

Production

Year	Honda (HCM)	Toyota (TMMC)	CAMI	Total	% Change
2003	392,230	227,543	51,475	671,248	4.6%
2002	361,018	218,011	62,746	641,775	4.0%
2001	370,994	166,131	79,961	617,086	-0.6%
2000	326,804	183,740	110,444	620,988	3.6%
1999	274,908	211,081	113,400	599,389	51.2%
1998	179,751	171,739	45,000*	396,490	3.4%
1997	165,181	108,252	110,000*	383,433	4.8%
1996	144,482	97,344	124,000*	365,826	-3.8%
1995	106,133	90,136	184,000*	380,269	4.4%
1994	108,308	85,870	170,000*	364,178	6.4%

* Estimated

Source: JAMA Canada

Exports

Year	Honda (HCM)	Toyota (TMMC)	CAMI	Total	% Change
2003	318,526	147,805	44,244	510,575	4.5%
2002	269,376	164,958	54,467	488,801	-1.8%
2001	297,092	127,486	72,939	497,517	0.6%
2000	255,714	138,657	100,159	494,530	2.6%
1999	211,535	168,463	102,200	482,198	54.3%
1998	144,544	130,021	38,000*	312,565	7.0%
1997	121,248	73,855	97,000*	292,103	-1.7%
1996	112,999	67,153	117,000*	297,152	-7.2%
1995	88,117	67,151	165,000*	320,268	3.5%
1994	90,427	65,935	153,000*	309,362	2.0%

* Estimated

Source: JAMA Canada

JAMA Canada Members' Sales in Canada

	2003	2002	2001	2000	1999	1998	1997	1996
Passenger Cars	347,759	355,417	319,576	282,666	266,055	246,335	226,023	182,745
Japan Built	122,255	143,696	122,465	106,876	105,955	98,536	65,065	48,323
N.A. Built	225,504	211,721	197,111	175,790	160,100	147,799	160,958	134,422
Light Trucks	132,102	127,275	111,102	100,507	98,622	83,123	71,033	35,485
Japan Built	70,337	70,791	65,583	56,893	55,485	53,863	53,256	22,396
N.A. Built	61,765	56,484	45,519	43,614	43,137	29,260	17,777	13,089
Total Light-Duty Vehicles	479,861	482,692	430,678	383,173	364,677	329,458	297,056	218,230
Japan Built	192,592	214,487	188,048	163,769	161,440	152,399	118,321	70,719
N.A. Built	287,269	268,205	242,630	219,404	203,237	177,059	178,735	147,511

Source: JAMA Canada

Imports from Japan

Year	Passenger Cars	Trucks	Total	% Change
2003	190,888	1,342	192,230	-18.1%
2002	233,633	1,028	234,661	24.3%
2001	187,901	917	188,818	12.5%
2000	167,000	894	167,894	0.4%
1999	166,262	917	167,179	14.7%
1998	144,922	833	145,755	3.3%
1997	140,189	846	141,035	100.6%
1996	69,647	644	70,291	-3.9%
1995	69,712	3,410	73,122	-36.2%
1994	105,268	9,371	114,639	-34.4%

Source: JAMA

Imports from U.S. / Mexico (NAFTA)

Year	Passenger Cars	Trucks	Total	% Change
2003	108,596	44,405	153,001	-20.5%
2002	92,895	34,118	127,013	1.9%
2001	97,523	27,082	124,605	15.6%
2000	75,383	32,376	107,759	22.4%
1999	58,049	29,974	88,023	-12.7%
1998	76,990	23,826	100,816	6.3%
1997	75,915	18,892	94,807	21.1%
1996	67,586	10,697	78,283	2.3%
1995	64,577	11,929	76,506	6.4%
1994	61,852	10,051	71,903	78.9%

Source: JAMA Canada

Japanese Automakers' North American Manufacturing Operations

U.S.

- E AUTOALLIANCE**
(Mazda/Ford)
Flat Rock, Michigan
Cars
- F MITSUBISHI**
Normal, Illinois
Cars, SUV
- 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
- N NUMMI (Toyota/GM)**
Fremont, California
Cars, Trucks
- O NISSAN**
Canton, Mississippi
Pick-up, SUV, Minivan
- P TOYOTA**
Huntsville, Alabama
V8 Engines
- Q MITSUBISHI**
(JV with DaimlerChrysler and
Hyundai Motors)
Dundee, Michigan
4 cyl. engines (2005)
- R TOYOTA**
San Antonio, Texas
Trucks (2006)

Canada

- A CAPTIN**
(Toyota)
Delta, B.C.
Wheels
- B HONDA**
Alliston, Ontario
Cars, Minivans
SUV, Pick up
(2005)
- C TOYOTA**
Cambridge,
Ontario
Cars, engines
SUV
- D CAMI**
(Suzuki/GM)
Ingersoll, Ontario
SUVs

Mexico

- U NISSAN**
Aguascalientes,
Ags.
Cars
- V HONDA**
Jalisco
Cars,
Motorcycles/parts
- W NISSAN**
Cuernavaca,
Morelos
Cars, Trucks
- X TOYOTA**
Tijuana, Baja
California
Truck beds,
Trucks (2005)



Japanese Automotive-Related Investment and Joint Ventures in Canada

Company	Location	Province	Type of Venture	Year Operational
AUTOMOTIVE PARTS MANUFACTURERS				
NTN Bearing Mfg. Canada Radial ball-bearings for pulley & tensioner applications, alternator, fan, clutch, electric motor & shaft support	Mississauga	ON	D	1973
Canadian Autoparts Toyota Inc. (CAPTIN) Aluminum wheels	Delta	BC	D	1984
F & P Mfg. Inc. Engine & rear suspension parts, engine support, pedal/clutch assemblies, bumper beams; tube bending, hydroforming & laser cutting	Tottenham	ON	J	1986
Quality Safety Systems Co. (QSS) Active seat belt systems; injection molding parts	Tecumseh	ON	D	1986
Meritor Suspension Systems Co. Suspension components & systems (coil springs, stabilizer bars & torsion bars)	Chatham/ Milton	ON ON	J	1986
Waterville TG Inc. Door sealing systems (weatherstrips & weatherseals)	Waterville	QUE	D	1986
General Seating of Canada Ltd. Automotive seating systems; side impact door beams	Woodstock	ON	J	1987
Nichirin Inc. Hose & tube assemblies for brake/clutch/power steering systems; engine & transmission oil cooler hose & tube assemblies	Brantford	ON	D	1987
DDM Plastics Inc. Plastic bumpers & parts, instrument panels	Tillsonburg	ON	J	1988
TS Tech Canada Inc. Seat assemblies	Newmarket	ON	D	1988
Vuteq Canada Inc. Auto glass assembly, door trim, softops & sunvisors	Woodstock	ON	D	1989
Bridgestone/Firestone Canada Inc. Radial tires; tire cord	Mississauga/ Woodstock/ Joliette	ON ON QUE	D	1990
Yachiyo of Ontario Mfg. Inc. Gas tanks, body parts, sunroof parts, glass holders, front & rear frames & door hinges	Barrie	ON	D	1990
Freudenberg-NOK Gaskets (rocker cover, electrical sealing & extrusion); cam cover seals, fuel system parts & silicone molded parts	Tillsonburg	ON	J	1991
Omron Dualtec Automotive Electronics Inc. (Relay Div.) Electro-mechanical relays & controls; electronic modules (turn signal flashers & controls)	Oakville	ON	D	1991
Craft Originators Inc. Dimensional badging, emblems & trim; backlit graphic overlays & inserts, production, service & under-hood labels	Hamilton	ON	D	1995
Intertec Systems Instrument panels, air bag door covers & small plastic parts	St. Marys	ON	J	1995
Trimont Manufacturing Inc. Auto trim & seat covers	Markham	ON	D	1996
Listowel Technology Inc. Injection moulded plastic parts	Listowel	ON	D	1997
AGC Automotive Canada Inc. (formerly AP Cantech Inc.) Automotive glass	Bradford	ON	J	1998
Dyna-Mig Mfg. of Stratford Inc. Underbody/suspension parts (welding: frames, suspension arms, crossmembers); clutch/brake pedal/ball joint assembly; cold forging	Stratford	ON	D	1998
HiSAN of Canada, Ltd. Automotive tubular products, incl. brake tubes, fuel tubes (steel & plastic), engine parts & power steering parts	Orangeville	ON	J	1998
Jefferson Elora Corp. (JEC) Body components (dashboard panels, pillars)	Elora	ON	J	1998
KTH Shelburne Mfg. Inc. Automotive frame components	Shelburne	ON	J	1998
Kumi Canada Corporation Fenders, column covers	Bradford	ON	J	1998

Japanese Automotive-Related Investment and Joint Ventures in Canada

Company	Location	Province	Type of Venture	Year Operational
AUTOMOTIVE PARTS MANUFACTURERS				
Musashi Auto Parts Canada Inc. Steering, suspension, transmission & clutch components	Arthur	ON	D	1998
Nagata Auto Parts Canada Co., Ltd. Door hinges	London	ON	D	1998
Denso Manufacturing Canada Inc. (DMCN) Air conditioners	Guelph	ON	D	1999
Omron Dualtec Automotive Electronics Inc. (Switch/ECU Div.) Switch/Electrical Control Units (switch assemblies for power seats/windows/doors, instrument panels, moon roof limit switches, other micro-switch based assemblies)	Oakville	ON	D	1999
Showa Canada Inc. Shock absorbers, brake and rear suspension components, drive shafts	Schomberg	ON	D	1999
Waterville TG Inc. Door sealing systems (weatherstrips & weatherseals) & warehouse	Petrolia	ON	D	2000
TG Minto Corporation Plastic interior & exterior components: console box, instrument panels	Palmerston	ON	D	2001
Ube Automotive North America Sarnia Plant, Inc. Aluminum wheels	Sarnia	ON	D	2002
FIO Automotive Automotive frame parts	Stratford	ON	D	2003
Aisin Canada Inc. Auto body parts, belt moldings & windshield trim	Woodstock	ON	D	2003
Trim Masters Inc. Seating systems & door panels	Elmira	ON	J	2003
MATERIALS AND MACHINE TOOLS				
Sanyo Canadian Machine Works Inc. Automated assembly line systems	Elmira	ON	D	1982
Aclo Compounders Inc. Plastic compound (thermoplastic)	Cambridge	ON	J	1986
Canada Mold Technology Inc. Plastic injection molds	Woodstock	ON	J	1989
Z-Line (Stelco Inc.) Zinc alloy plating	Hamilton	ON	J	1990
DJ Galvanizing (formerly DNN Galvanizing) Galvanized steel	Windsor	ON	J	1993
Monzen Steel Inc. (c/o Metal One Canada Corp.) Automotive steel coil processing	Ingersoll	ON	J	1996
YM Technology Inc. Dies & tools	Elmira	ON	J	1999
Maple Automotive Corp. Tire & wheel assembly	Cambridge	ON	D	2003
Aar-Kel Moulds Ltd. Plastic injection moulds (med-large size) & light pressure aluminum/magnesium die casting dies	Wallaceburg	ON	J	2004
JIT-KASAI Controls Limited Precision insert molding for automotive electrical switch components & switches	Markham	ON	J	2004
NEWLY ANNOUNCED				
Amino Corporation Auto body panels for specialty & niche vehicles	St. Thomas	ON	D	Oct. 2004
Summary of Investments (Excludes Newly Announced)	Automotive Parts	Materials & Machine Tools	Total	Total Employees
J - Joint Venture	12	8	20	4,341
D - Direct Investment, wholly-owned	24	2	26	9,769
	36	10	46	14,110



Itaru Koeda
Chairman, JAMA

The Auto Industry in Japan - 2003

The Year in Perspective

In 2003, there were some positive signs of an emerging recovery in the Japanese economy particularly evident in the rise of the Nikkei 225 from 8,500 to almost 11,000 at year end, as well as a 10% jump in non-residential investment and a 2.7% gain in GDP over 2002. Moreover, the Bank of Japan's business confidence index in the 4th quarter of 2003 was at its highest level since 1997. Orders for new machinery jumped 18% in December 2003 over the same month in 2002, and unemployment which hit a high of 5.5% in

2003 had fallen to 4.9% by the end of the year. While growth in global trade has been beneficial to Japanese exports and imports of goods and services (which rose 7.5% and 4.5% respectively), it is the breathtaking economic growth in China, particularly in the auto sector, that has drawn the attention of automakers and parts makers in Japan and around the world.

While overall vehicle sales were relatively flat in 2003, up 0.6% to just over 5.8 million units, there was a noticeable jump of 14% in sales of large passenger cars, and forecasts suggests this nascent recovery in demand for large cars will carry over into 2004 after a six year slump. The relative vigour of Japan's large car market nudged overall car sales just barely into the plus column. In 2003, dealers sold more than 4.4 million passenger cars, a 0.4 percent increase over the previous year. Dealers sold 768,847 large cars in 2003, up more than 14 percent over the previous year. In contrast, sales of small and mini cars had dropped slightly from 2002 levels to nearly 2.4 million and 1.3 million units, a decline of 2.5 percent and 1.2 percent, respectively.

Sales of heavy duty trucks were also a bright spot in 2003 due to the enforcement of more stringent diesel emission regulations in several major urban areas. Sales of heavy trucks soared 47% in 2003, but this is not expected to continue in 2004. Other parts of the industry were also in positive territory, but gains were decidedly modest as production edged up 0.3% to 10.28 million units, exports to all countries increased 1.2% to 4.75 million, and sales of imported vehicles mirrored the total market with a gain of 0.6% to almost 279,000 units.

The Outlook for 2004

In its annual vehicle forecast, which examines all segments of the domestic vehicle market, the Japan Automobile Manufacturers Association (JAMA) has predicted that vehicle sales in Japan will increase 0.9 percent in 2004, basically remaining in the range of the 5.9 million units recorded last year. The forecast sees an increase in passenger cars offset by an 18.9 percent decline in commercial vehicles.

Most of the growth, according to the forecast, will come from sales of large cars, up 13.6 percent. JAMA predicts that sales of small and mini cars will increase only 0.3 and 0.8 percent, respectively, largely due to the fact that mini cars increased dramatically (37 percent) starting in 1998 and levelled out in 2003.

Motor Vehicle Production

Year	Cars	% Chg.	Trucks	% Chg.	Buses	% Chg.	Total	% Chg.
2003	8,478,328	-1.6	1,746,916	11.1	61,074	-7.9	10,286,318	0.3
2002	8,618,354	6.2	1,572,640	-1.8	66,321	14.2	10,257,315	4.9
2001	8,117,563	-2.9	1,601,536	-7.3	58,092	6.5	9,777,191	-3.6
2000	8,359,434	3.2	1,726,818	-1.2	54,544	12.7	10,140,796	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

Note: Percentage figures represent the change from the preceding year

Source: JAMA

Motor Vehicle Exports

Year	Cars	% Chg.	Trucks	% Chg.	Buses	% Chg.	Total	% Chg.
2003	4,080,494	1.7	630,254	-1.2	45,591	-6.5	4,756,339	1.2
2002	4,012,371	12.4	637,593	15.3	48,762	9.6	4,698,726	12.8
2001	3,568,717	6.0	552,891	-10.5	44,481	8.1	4,166,089	-6.5
2000	3,795,852	1.0	617,870	0.8	41,163	7.3	4,454,885	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

Note: Percentage figures represent the change from the preceding year

Source: JAMA

New Motor Vehicle Registration

Year	Cars	% Chg.	Trucks	% Chg.	Buses	% Chg.	Total	% Chg.
2003	4,460,019	0.4	1,346,908	0.9	21,256	29.9	5,828,183	0.6
2002	4,441,354	3.5	1,334,380	-16.6	16,359	2.7	5,792,093	-1.9
2001	4,289,683	0.7	1,600,856	-5.1	15,932	-3.9	5,906,471	-0.9
2000	4,259,872	2.5	1,686,599	-0.4	16,571	14.5	5,963,042	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

Note: 1. Figures include imported vehicles

Source: JAMA

2. Percentage figures represent the change from the preceding year

Exports by Destination

	1995	1996	1997	1998	1999	2000	2001	2002	2003
Asia	616,027	620,016	606,389	264,987	290,436	410,590	351,227	426,692	524,094
Middle East	206,446	284,881	346,154	455,159	308,114	295,176	381,965	419,274	439,587
Europe	918,831	948,712	1,254,879	1,370,931	1,329,216	1,136,083	895,415	949,699	1,159,706
(EU)	(792,058)	(801,858)	(1,025,688)	(1,132,535)	(1,154,992)	(973,076)	(780,750)	(837,639)	(988,523)
North America	1,301,218	1,169,073	1,412,055	1,459,338	1,723,598	1,836,941	1,795,816	2,076,296	1,786,382
(U.S.A.)	(1,228,096)	(1,098,504)	(1,271,095)	(1,313,583)	(1,556,419)	(1,669,047)	(1,606,998)	(1,841,635)	(1,594,152)
Central and South America	329,064	279,641	437,848	450,128	277,825	298,801	293,556	287,165	272,297
Africa	137,718	134,027	174,325	170,836	131,489	110,218	98,524	144,979	146,269
Oceania	274,828	265,478	310,776	347,194	337,288	357,739	341,808	385,455	418,202
Others	6,677	9,626	10,776	10,302	10,987	9,337	7,778	9,166	9,802
Total	3,790,809	3,711,454	4,553,202	4,528,875	4,408,953	4,454,885	4,166,089	4,698,726	4,756,339

Source: JAMA

New Registrations of Imported Vehicles

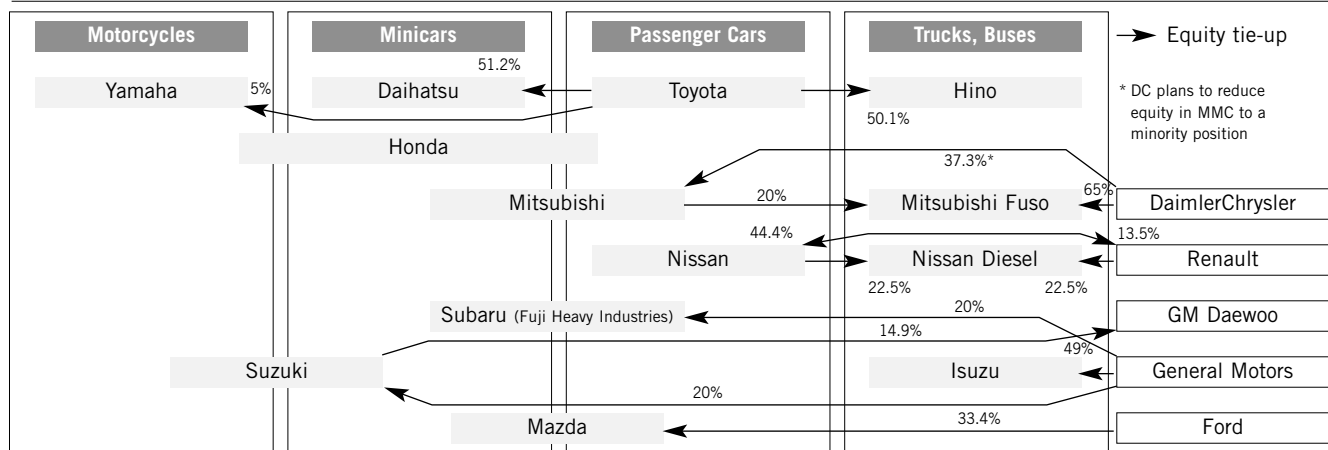
Types of Vehicles	1995	1996	1997	1998	1999	2000	2001	2002	2003
Foreign Manufacturers									
Passenger Cars	260,389	311,279	294,890	242,407	245,510	247,799	254,558	256,528	243,996
Trucks	20,933	25,535	19,382	9,619	6,654	7,673	6,710	4,069	3,565
Buses	13	29	9	39	17	10	9	2	45
Sub-total	281,335	336,843	314,281	252,065	252,181	255,482	261,277	260,599	247,606
Japanese Manufacturers*									
Passenger Cars	101,876	82,113	46,605	23,441	25,926	19,968	14,002	16,466	31,198
Trucks	4,951	8,569	3,996	363	118	2	0	0	0
Sub-total	106,827	90,682	50,601	23,804	26,044	19,970	14,002	16,466	31,198
Total									
Passenger Cars	362,265	393,392	341,495	265,848	271,436	267,767	268,560	272,994	275,194
Trucks	25,884	34,104	23,378	9,982	6,772	7,675	6,710	4,069	3,565
Buses	13	29	9	39	17	10	9	2	45
Sub-total	388,162	427,525	364,882	275,869	278,225	275,452	275,279	277,065	278,804
% Chg.	28.8	10.1	-14.7	-24.4	0.9	-1.0	-0.1	0.6	0.6

Note: Percentage figures represent the changes from the preceding year

Source: JAMA

* Vehicles produced overseas by Japanese manufacturers

Automakers' Equity Affiliations in Japan



Sustainable Mobility in Japan

While all countries are increasingly concerned about the issue of sustainable mobility, the challenge is intensified in Japan by population density and industry concentration over a relatively small land mass. With four times the population of Canada contained in an area about the size of southern Ontario, less than 40% of Japan is suitable for habitation due to rugged mountainous terrain. When combined with Japan's lack of natural resources, particularly petroleum, and historical patterns of economic development, these factors help explain the structure of the auto market and the heavy reliance on mass transportation. Over 80% of the car market in Japan is comprised of small vehicles with engines under 2 litres. Given the economic malaise that Japan has endured since the early 1990's, it is not surprising that the 'mini-car' market (under 660cc) has grown significantly in recent years.

With economic growth and population concentration, Japan is compelled to address social and environmental factors that would limit growth and the quality of life. Key priorities for the auto industry in Japan and around the world are air pollution, fuel consumption and vehicle disposal.

- Air & Noise Pollution:** Since the mid-1960's, Japanese auto manufacturers have been striving to develop new technologies to fight air pollution, and having been cooperating with governments to meet and exceed increasingly stringent emission reduction targets in gas and diesel fueled vehicles for carbon monoxide (CO), nitrogen oxide (NOx), hydrocarbon (HC) and particulate matter (PM). Current emission regulations for gasoline powered vehicles have resulted in a 98% reduction in CO, NOx and HC from pre-regulated levels. Diesel emissions are also being targeted as new regulations will bring NOx and particulate matter levels to 80% below their pre-regulated levels. In 2005, NOx from diesels will be lowered again by 50% and PM another 80%.

Automakers continue to develop new technologies to meet and often exceed these stricter standards. Recent examples include exhaust gas recirculation and catalytic converters with O2 sensors for gas engines, and ceramic filters and common rail-type electronic fuel injection systems for diesels.

Noise pollution has been an ongoing concern in Japan as a result of population density particularly in urban areas. Both automakers and

tire manufacturers have focused on noise abatement technologies to the point where Japanese automakers produce the quietest vehicles in the world, and vehicle noise levels are 90% lower than 30 years ago.

- Fuel Conservation :** As a signatory to the 1997 Kyoto Protocol, Japan set a target of reducing greenhouse gas emissions (GHG) by 6% below the 1990 level for the 2008-2012 period. The transportation sector, which accounts for 21.4% of the total CO2 emissions in Japan, will help by cutting CO2 emissions to the 1995 level by 2010, which represents a 16% reduction from baseline levels. These goals will be met in three ways. First is through fuel economy improvements in the internal combustion engine; second, through the introduction of clean energy vehicles such as those fueled by CNG, gas and diesel /electric hybrid technology, diesel alternative LPG and methanol; and third, through the ongoing development of intelligent transportation systems (ITS) such as navigation systems combined with electronic notification of traffic congestion.

To reach these goals, in 1998 the Japanese Government established targets to improve fuel consumption in gas powered cars by 22.8% by 2010 and in diesel powered cars by 14.9% by 2005 over the 1995 level. In fact, Japan has already seen a substantial increase in fuel efficiency as new gas powered cars increased fuel economy by 19.2%, from 12.5 km/l (about 29.4 mpg) in 1995 to 14.9 km/l (about 35.0 mpg) in 2002. The target for 2010 is 15.1 km/l, which is about 35.5 miles per gallon.

At the same time, Japanese automakers are also aggressively pursuing fuel cell technology. With government funds supporting various activities including research, demonstration programs and the construction of five hydrogen refueling stations, the current goal is to have 50,000 fuel cell vehicles on the road in Japan by 2010.

- End of Life Vehicle Recycling:** As a result of limited land area and about 5 million deregistered vehicles each year, both automakers and the government have been working to increase the recycling rate from about 85% of gross vehicle weight to 95% by 2015. Japan's Automobile Recycling Law was passed in July 2002 and comes into effect in January 2005. Recycling involves a wide range of new technologies and methodologies from the design stage through the final scrapping of the vehicle. JAMA is taking an active role in this effort by establishing the Japan Automobile Recycling Promotion Centre with eight other auto related organizations.

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Brad Bradshaw

Corporate Secretary

David Worts



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One Toyota Place, Scarborough, Ontario M1H 1H9
























Toyota Motor Manufacturing Canada Inc.

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 **Hino**



 165 Series Japan	 268 Series Japan
 185 Series Japan	 308 Series Japan
 238 Series Japan	 338 Series Japan















 **Honda**,  **Acura**



 Accord Coupe U.S.	 Civic Hybrid Japan
 Accord Sedan U.S.	 Element U.S.
 CRV Japan	 Acura 3.2 CL Type S U.S.
 Insight Japan	 Acura NSX Japan
 Odyssey U.S.	 Acura 3.5 RL Japan
 Pilot Canada	 Acura 3.2 TL U.S.
 S2000 Japan	 Acura 1.7 EL Canada
 Civic Sedan Canada	 Acura RSX Japan
 Civic Coupe U.S.	 Acura MDX Canada
 Civic SiR U.K.	 Acura TSX Japan

 **Mazda**

 Tribute U.S.	 Mazda3 Sport Japan
 RX-8 Japan	 Mazda6 U.S.
 B3000/4000 U.S.	 Mazda6 Sport Hatchback Japan
 Miata Japan	 Mazda6 Sport Wagon Japan
 MPV Japan	 MazdaSpeed MX-5 Japan
 Mazda3 Japan	

 **Nissan**,  **Infiniti**

 Sentra Mexico	 Armada U.S.
 Sentra SE-R Mexico	 350Z Japan
 X-Trail Japan	 350Z Roadster Japan
 Altima U.S.	 Murano Japan
 Frontier Crew Cab U.S.	 Quest U.S.
 Maxima SL U.S.	 Titan U.S.
 Pathfinder U.S.	 Infiniti I35 Japan

 Nissan,  Infiniti



Infiniti Q45
Japan



Infiniti FX35/FX45
Japan



Infiniti G35
Japan



Infiniti G35/G35X
Japan



Infiniti M45
Japan



Infiniti QX56
U.S.

 Subaru



Forester
Japan



Impreza WRX STI
Japan



Forester Turbo
Japan



Legacy Sedan
U.S.



Impreza Outback Sport Wagon
Japan



Legacy Wagon
U.S.



Impreza Sedan
Japan



Outback
U.S.



Impreza WRX Sedan
Japan

 Suzuki



Aerio Fastback
Japan



XL-7
Japan



4 Door Vitara
Canada



Aerio Sedan
Japan





Swift+
South Korea



Grand Vitara V6
Japan



Verona
South Korea

 Toyota,  Lexus



Camry
U.S.



Corolla
Canada



Camry Solara
U.S.



Avalon
U.S.



Camry Solara Convertible
U.S.



Tundra
U.S.



Echo Hatchback
Japan



4 Runner
Japan



Echo
Japan



Lexus LX 470
Japan



Highlander
Japan



Lexus RX 330
Canada



Prius
Japan



Lexus IS 300
Japan



RAV4
Japan



Lexus GS 430
Japan



Sequoia
U.S.



Lexus LS 430
Japan



Sienna
U.S.



Lexus SC 430
Japan



Tacoma
U.S.



Lexus GX 470
Japan



Celica
Japan



Lexus ES 330
Japan



Matrix
Canada



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