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Meet Takao Suzuki,
JAMA President

a report from the Japan Automobile Manufacturers Association • volume 7 number 1 • March 2003

Automakers Propose Auto Tax Reform Proposals Aimed at Stimulating Economic Recovery

COMMENTARY

AUTO TAX REFORM IN JAPAN



William C. Duncan, Ph.D.
General Director, JAMA USA

Japanese national and local governments receive more than 10 percent of their entire revenue from nine automobile related taxes. These include sales, property and fuel taxes, which have risen over the years leaving Japanese consumers with less yen in their pockets and little understanding of the logic or purpose of the system. Polls show that 66 percent of consumers want reform and the automobile industry has decided to do something about it. (See article, page 1).

A significantly simplified outline of this complicated auto tax system follows:

- The Japanese new car buyer pays a 5 percent "acquisition tax" (a kind of luxury sales tax) on the base price of the vehicle at the time of purchase. This tax originated in 1968 when cars for personal use were still considered a luxury.
- The acquisition tax is not out of line with many state sales taxes in the U.S. However, in 1989 the Japanese government imposed a new sales tax of 3 percent on all products, including automobiles. This was raised to 5 percent in 1997. Since the government did not abolish the acquisition tax, the Japanese consumer now pays a double tax on new cars totaling a whopping 10 percent.

COMMENTARY—Continued, Page 2

Japanese automakers are urging government officials to reform Japan's automobile tax laws because they believe a simplified, less burdensome system would stimulate economic recovery at home.

The Japan Automobile Manufacturers Association (JAMA) plans to submit a package of auto tax proposals to two government ministries this fall.

Once reviewed and modified, the Ministry of Land, Infrastructure and Transport and the Ministry of Economy, Trade and Industry would forward the pro-

posals to the ruling Liberal Democratic Party, whose members might introduce tax reform legislation in the Japanese Diet in January 2004. If approved, the tax changes would go into effect on April 1, 2004.

"Automakers want to enhance the overall rewards of vehicle ownership," said JAMA Chairman Yoshihide Munekuni. "Domestic car users are at present saddled with a complex and excessively burdensome set of automobile taxes."

That burden, he said, is the result of nine

AUTO TAX REFORM—Continued, Page 6

"Domestic car users are at present saddled with a complex and excessively burdensome set of automobile taxes."

-JAMA Chairman
Yoshihide Munekuni

Automakers Enhance Dealerships to Boost Sales

Japanese automakers are expanding or revitalizing their dealerships in an effort to bolster domestic sales, which dropped 1.9 percent to 5.79 million vehicles in 2002.

Honda Motor Co. said it plans to renovate its 2,400 dealerships and equip its 13,000 sales representatives nationwide with laptop computers so that they can respond quickly to customer queries.

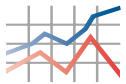
Toyota Motor Corp. plans to introduce the Lexus brand to Japan and reduce its number of sales channels from five to four. The move is aimed at helping Toyota respond better to changes in con-

sumer preferences in order to compete more effectively in Japan's competitive auto market.

Mazda Motor Corp. also said it's planning to expand its dealerships, most likely locating new stores in the suburbs. ♦



Mazda Motor Corp. is expanding dealerships.



COMMENTARY—Continued From Page 1

- Taxes don't stop here. In addition to regular inspection fees, the Japanese car owner pays an annual vehicle property tax, ranging from between \$250 and \$900 depending on engine size. On top of this, owners pay an annual weight tax amounting to about \$105 on a one-ton vehicle. These taxes are supposed to cover road building and road maintenance costs, but the budget process offers little explanation as to their actual use.
- Then there are high fuel taxes totaling about \$1.69 per gallon or more than 50 percent of the gas price. Federal and local gas taxes in the U.S. come to about 41 cents per gallon or less than 30 percent of the gas price.

In short taxes have not kept up with significant changes in the market and the vehicle environment. On the one hand, automobiles in Japan, once a luxury for the elite, are now a necessity for most households. In 1965, for example, fewer than 10 percent of households in Japan owned a car. Today almost all households own a car and half of them own two cars. Tax rates should reflect the change. On the other hand, tax incentives should be used to encourage consumers to purchase environmentally friendly vehicles, such as hybrid and fuel cell vehicles, powered by cutting-edge technology. Overall the task is to reform the maze of taxes in a fair, simplified and environmentally friendly way consistent with practices in other countries.

The Future

The Japanese automobile industry and its consumers have changed significantly since the auto tax laws were first put in place. Furthermore, new forces such as global warming, the need to conserve fuel and environmental protection require innovative new approaches towards personal transportation. These forces will in due course begin to reshape the tax structure and hopefully eliminate the double taxation as well. When this happens, both the consumers and the economy will benefit—the sooner, the better.

Your thoughts and views about this commentary are welcome. Please send them to me at wd@jama.org or by fax to 202-872-1212.

Car Theft Rate Climbs

Government and Private Sector Organizations Fight Back

Government agencies, the Japan Automobile Manufacturers Association (JAMA) and several other private sector organizations have launched a wide-ranging national campaign aimed at halting Japan's escalating car theft problem, which officials link to organized crime.

Until 1998, the National Police Agency (NPA) reported 35,000 car thefts a year. However, the number has escalated rapidly since 1999. In 2001, NPA reported 63,275 thefts, a 12.6 percent increase over the previous year.

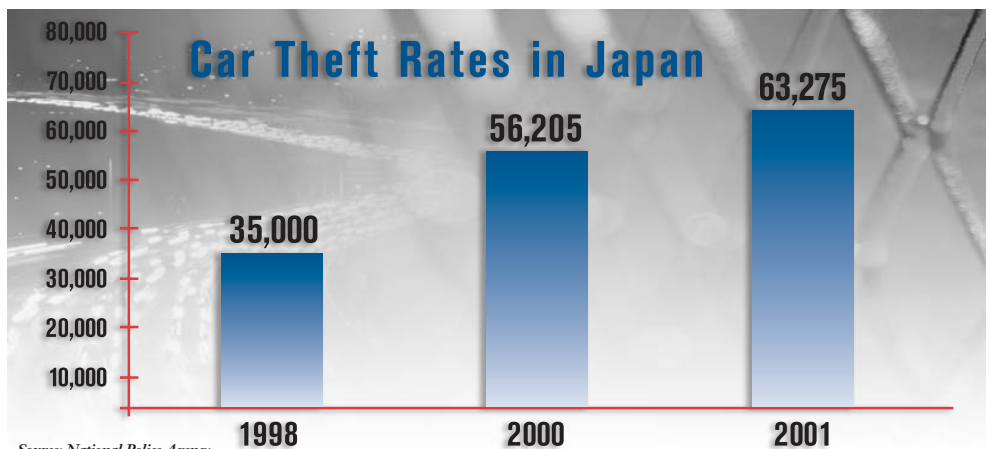
The escalation is especially noteworthy because Japan is well known for its crime-free streets.

Government officials believe professional car thieves are principally to blame for the problem. They believe criminals alter identification numbers, counterfeit registration certificates and illegally export the cars to

countries such as the United Kingdom, Russia and Australia.

To combat the problem, NPA, Customs, JAMA, the Marine & Fire Insurance Association of Japan (Insurance Association)

In 2001, the National Police Agency reported 63,275 car theft cases, a 12.6 percent increase over the previous year.



Source: National Police Agency.

A Look Ahead: Japanese Vehicle Sales Forecast

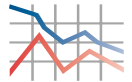
In its annual forecast, the Japan Automobile Manufacturers Association (JAMA) has predicted that domestic demand for passenger cars and commercial vehicles will reach 5.85 million units in 2003. That represents a slight increase over 2002 sales, which declined 1.9 percent to 5.79 million units.

Most noticeable in JAMA's forecast is the trend towards a more stable truck market. Last year, truck sales fell 16.7 percent, while JAMA

sees only a 1.4 percent drop this year.

Despite this cloudy outlook, Japan's economy could transition from its current low level of activity into positive growth as a result of various government-sponsored incentive programs, said Yoshihide Munekuni, JAMA Chairman.

"Auto manufacturing is an integrated industry that supports a large number of related industries, ranging from distribution and mate-



Automakers Turn to New Technologies to Prevent Thefts

and others have launched a new 5-year program aimed at halting the increase in thefts this year and reducing it in subsequent years.

In particular, the program promotes the use of theft prevention devices (see related story to the right) and the installation of x-ray detection systems that could detect smuggled cars hidden inside shipping containers.

NPA, the Ministry of Land, Infrastructure and Transport and Customs plan to install x-ray detection machines at shipping ports in Kobe, Osaka, Tokyo and Nagoya. They also plan to carry out more thorough inspections.

In addition, JAMA and the Insurance Association have created a public-service campaign urging Japanese drivers to discontinue the practice of leaving car keys inside unattended vehicles. According to government statistics, about 40 percent of the car thefts occurred when drivers left car keys in their ignitions.

The campaign also urges consumers to install visible and audible theft prevention devices.

The insurance industry has a financial interest in promoting theft prevention. Between 1990 and 2001, the amount it paid in compensation jumped from 2.8 billion yen to 59.3 billion yen, a 21-fold increase. To further deter auto theft, the Insurance Association also has begun providing data on stolen vehicles to the used car market. ♦

Automakers are reacting to the escalating car theft problem by installing new technologies on specific models.

The so-called immobilizer tops the list. This advanced lock device prevents the engine from starting unless the identification code embedded on an electronic chip in the engine key matches the code in the car. With this technology, even copies of the key can't start engines.

Experience has shown that thefts have decreased among those models equipped with this clever technology and Japanese insurance companies have begun offering premium discounts to customers who install the system in their vehicles.

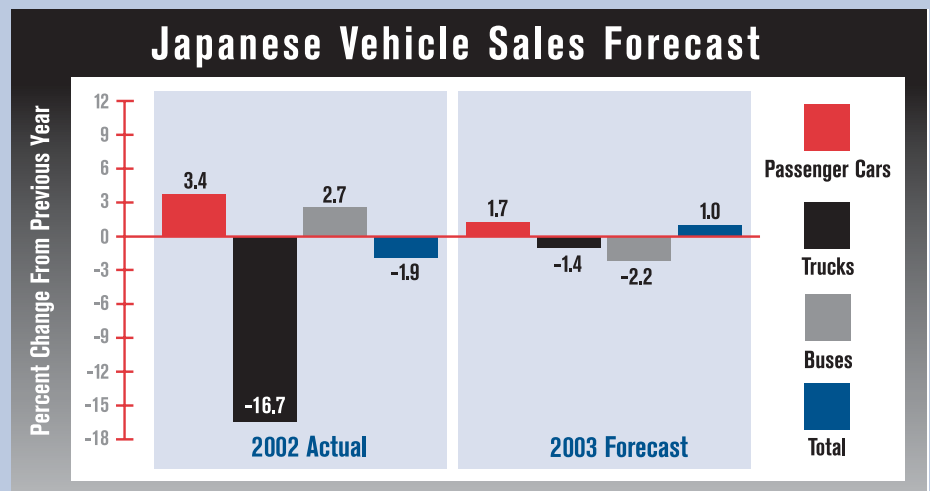
Other anti-theft technologies include:

- **CarBox.** Developed by Sohgo Security Services Co., Ltd. and Omron, the system senses whether someone has improperly entered a car or disconnected its wires. It also senses if someone moves a car. If the system detects activity, it sounds an alarm and alerts the owner by way of a cell phone. The owner may then contact the police or ask Sohgo to watch the vehicle until police arrive.
- **Tsuiseki i.** Developed by subsidiaries of several Japanese companies and an insurance company, this system is similar to CarBox in that it watches and reports theft attempts. In addition, this system provides theft insurance. ♦

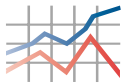
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rials supply to infrastructure, and it therefore plays a critical role in the national economy and in employment,” Munekuni said in his annual New Year’s address. “This being so, the industry must remain vigorous by aggressively coming to grips with the many issues confronting it in order to spearhead economic recovery in Japan.”

Despite lukewarm domestic sales, Munekuni reported that total domestic production totaled 10.25 million units, up 4.8 percent from 2001. The increase was due in large part to increased sales in China and North America. ♦



Source: Japan Automobile Manufacturers Association



Fuel Cell Quest Forges International Collaborative Efforts Among Automakers, Parts Suppliers and Others

Companies Focus on Refueling Technologies for the Future

The quest to develop a commercially viable fuel cell powered vehicle has gained momentum among automakers, parts and machinery manufacturers and energy companies.

Toyota Motor Corp., Nissan Motor Co., DaimlerChrysler and Ford Motor Co., along with 20 other Japanese, American, Canadian and German parts makers, recently announced that they would jointly develop higher capacity fuel tanks.

With the improved fuel tanks, fuel cell vehicles would cover the same distances as gasoline powered vehicles before needing a fill up. Currently, the average gasoline powered vehicle can travel about 300 miles on one tank of gas.

By teaming up, the companies can reduce development costs and promote wider use of fuel cell vehicles. According to participants, the aim is to expand stor-



Machinery manufacturers and energy companies are moving fast to perfect hydrogen refueling pumps needed to run fuel cell vehicles.

age capacity without making the tank size any larger.

They said they hoped to develop the technology by the end of 2005.

Meanwhile, *Nihon Keizai Shimbun* recently reported that machinery manufacturers and energy companies are moving fast to develop hydrogen refueling sta-

tions. The Japanese government hopes to have 50,000 fuel cell vehicles on the roads by 2010. To achieve that goal, however, experts estimate that Japan would need at least 180 refueling stations in 2010 and 2,400 in 2020.

To make this happen, the Japanese government is expected to deregulate the industry (see related story, page 5). Just as important, the industry must reduce installation costs. Experts say hydrogen refueling stations are three times more expensive than gasoline stations because they require more specialized equipment.

According to the news report, Nippon Steel Corp. will start studying technology for transforming into fuel the excess hydrogen gas generated during coke production at steel mills. The steelmaker will install at its Chiba Prefecture plant equipment that generates 441 lbs. of liquid hydrogen a day.

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Fuel Cell Powered Mini Car and City Bus Tested

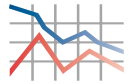
Daihatsu Motor Co. recently received approval from the Japanese Transport Ministry to test its fuel cell powered hybrid mini vehicle, the MOVE FCV-K-II, on public roads, making it the first "Kei" (mini car) carmaker to test the new technology.

The company said it hopes to put the car on the market as soon as possible.

Toyota Motor Corp. and its subsidiary, Hino Motors Ltd., also announced that the city of Tokyo had selected them to supply fuel cell powered buses. The city will operate the buses on regular routes this summer to gather data. ◆



Daihatsu Motor Co. will begin road testing this fuel cell powered hybrid mini, making Daihatsu the first to test a mini car.



Ebara Corp. has begun developing a hydrogen refueling system that combines solar energy systems with hydrogen generating systems made by its Norway-based partner, Norsk Hydro Electrolysers. Ebara hopes to create a refueling system that emits no carbon dioxide.

Sumisho Air Water Co. has developed a mobile filling station for supplying fuel cell powered vehicles. The truck-mounted system is equipped with a high-pressure hydrogen dispenser and an ultrahigh-pressure hydrogen storage tank. Toyota and Nissan said they would use the Sumisho system as part of their research efforts.

Japan's Environment Ministry also announced that it would seek a modest budget to begin studies of a concept to extract hydrogen from seawater. The ministry believes the idea could proceed quickly because it makes use of existing technology. ♦

Hydrogen Station 101

Hydrogen stations are the gas stations of the future and most likely will operate as part of existing gas stations, at least initially. Officials are considering three types: facilities that produce hydrogen directly from oil refineries or iron mills, those that produce hydrogen onsite by processing city gas and kerosene, and those that produce hydrogen through the electrolysis of water. To promote the development of these facilities—regardless of how they acquire their hydrogen fuel—the Japanese Ministry of Economy, Trade and Industry also plans to ask relevant ministries and agencies to amend their regulations to make it easier to construct hydrogen fueling stations next to gasoline stations. Without this critical infrastructure, which will cost millions to develop, fuel cell transportation won't develop, experts contend.



Japanese Vehicle Consumers Becoming More Concerned with Color

Japanese car buyers have always looked for quality and styling when buying a new car. In recent years, however, they've become increasingly more interested in color.

Silver still rates high among many consumers. However, the days of choosing silver simply because of its potentially higher trade-in value are over. Many people, particularly the young, want to own vividly colored automobiles, experts say.



The Nissan March

“When the economy is weak, people look for conservative colors,” said Reiko Maruyama, a representative of the Japan Fashion Color Association (JAFCA), a trade organization for designers and fashion specialists. However, if the trend lasts a

long time, people start looking for something brighter and bright colors make a comeback, she said in the *Sankei* newspaper.

That appears to be happening today. In March 2002, for example, Nissan Motor Co. rolled out its redesigned March vehicle, offering consumers a palette of 12 body and three interior color combinations from which to choose. The vehicle has sold well since.

In its 2003 color awards, which JAFCA sponsors annually to recognize exceptional color designs, the organization unanimously chose the March's paprika orange-cinnamon color combination. The organization recognized Honda Motor Co. for the dark cardinal red hue that it offers on its S2000 Giore and the 24 color combinations that Nissan offers on its Cube. Toyota Motor Corp. won JAFCA's technical award for its “cosmo silver.” ♦

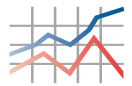
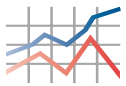
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Japan Automobile
Manufacturers Association



EXECUTIVE HIGHLIGHTS

Takao Suzuki, JAMA President and Vice Chairman Meeting Technical Challenges through International Cooperation

The year 1998 was a watershed year for the Japanese auto industry. The year opened days after the signing of the Kyoto Protocol on global warming. Asian economies were in financial turmoil; Japan was slipping back into recession; and auto sales were plunging. In May, Daimler Benz merged with Chrysler, starting a new trend in high-profile equity and managerial exchanges among the world's automobile companies. It also was the year that Takao Suzuki became JAMA President and Vice Chairman.

"There have been extraordinary changes in the automobile industry since I became President of JAMA," says Suzuki, whose long and distinguished career includes various positions with the Japanese Ministry of International Trade and Industry (MITI), including the Agency of Natural Resources and Energy and the Agency of Industrial Science and Technology.

Suzuki, who entered the automobile world in 1988 with his appointment as Director of MITI's Automobile Division, brings to JAMA a wide range of technical and international experience. As the lead diplomat in negotiations with the U.S. Department of Commerce, he was instrumental in establishing the Joint U.S.-Japan Market Oriented Cooperation Plan, which was designed to facilitate business relations



between U.S. auto parts suppliers and Japanese auto manufacturers.

Now as JAMA President, Suzuki believes that the most important challenges facing JAMA are "the globalization of the automobile industry" and "the challenge of environmental and automobile safety issues."

He believes it's vital that industry and government leaders find ways to standardize the maze of differing environmental and safety standards that countries impose on vehicles sold in their respective countries. Suzuki believes that reducing costs to the manufacturer and the consumer, while protecting the environment and ensuring occupant safety are the challenges.

These two issues come together in one of JAMA's highest priorities—the international harmonization of technical stan-

dards.

Suzuki has worked tirelessly to bring together the chief executive officers of the world's principal auto manufacturers to discuss harmonization and other issues. The first meeting took place last September in Paris (see www.jama.org, *Japan Auto Trends*, January 2003, Volume 6-4, page 1). The next meeting is scheduled during this year's Tokyo Motor Show in October.

Suzuki says that other JAMA priorities include developing automobile recycling standards for Japan, introducing new fuels, fuel cell cars and the infrastructure necessary to support them, and revising the tax laws. Suzuki currently serves as Chairman of the Board of the Japan Recycling Promotion Center and is playing an active role with the Japanese government to develop a simplified tax policy for automobiles—positions that ultimately will help him achieve JAMA's goals.

Suzuki knows that he and JAMA have a full plate this coming year. But in Suzuki's view, all considerations boil down to the consumer. "It is very important for the automobile companies to take on the enormous environmental, safety and other challenges and cooperate on a world level to achieve these goals for the benefit of the consumer." ♦

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Auto Tax Reform

Continued From Page 1

different automobile-related taxes, ranging from a weight and acquisition tax to local road and gasoline taxes. No other country in the world levies as many auto taxes on its citizens, JAMA says.

Central to the proposed tax overhaul is a reexamination of Japan's highway fund. According to JAMA, Japan has completed the construction of its main highway system and now should eliminate the sur-

charges earmarked specifically for highway construction. In the future, government officials should become more selective about the projects they undertake and consult with the public before investing in new roads.

JAMA also believes the government should offer preferential tax treatment to those who buy low-polluting and fuel-efficient vehicles and exempt those who buy

fuel cell vehicles from the nation's acquisition and automobile taxes, which are levied at the time of purchase. "We believe such measures will help our fuel cell technologies to become the de facto standard of the world," JAMA says.

Munekuni called the proposals fair and environmentally responsible and in line with international norms. ♦

WHAT'S HAPPENING IN THE MARKET

- Total import sales rose 2.8% while overall car sales rose 3.5%.
- Imports of General Motors-related brands fell 31.4%.
- Imports of BMW, Japan's third largest importer, rose 25.4%.

NEW IMPORTED PASSENGER CAR SALES IN JAPAN: JANUARY THROUGH DECEMBER 2002 VS. 2001

	Percent Change 2002/2001	Total Cars 2002	Total Cars 2001
GENERAL MOTORS			
Chevrolet	2.0%	4,696	4,606
Cadillac	-35.3%	1,121	1,733
Saturn	-98.3%	9	543
Opel	-37.9%	7,846	12,626
Saab	-46.0%	1,149	2,129
Other	15.0%	69	60
SUBTOTAL	-31.4%	14,890	21,697
FORD			
Ford	-12.7%	5,399	6,186
Volvo	-6.8%	15,321	16,437
Land Rover	-25.1%	2,209	2,950
Jaguar	41.3%	5,238	3,706
Aston Martin	27.6%	37	29
SUBTOTAL	-3.8%	28,204	29,308
DAIMLERCHRYSLER			
Chrysler	-22.7%	5,908	7,646
Mercedes-Benz	-10.3%	47,752	53,207
Smart	41.9%	5,747	4,051
SUBTOTAL	-8.5%	59,407	64,904
VW			
VW	-2.1%	59,834	61,121
Audi	44.5%	11,747	8,127
Other	-29.0%	154	217
SUBTOTAL	3.3%	71,735	69,465
BMW			
BMW	-0.9%	35,924	36,253
Mini	N/A	10,075	434
SUBTOTAL	25.4%	45,999	36,687
PORSCHE			
	-5.6%	2,044	2,166
RENAULT			
	-13.0%	2,412	2,774
PSA			
Peugot	23.3%	15,162	12,295
Citroen	5.8%	1,202	1,136
SUBTOTAL	21.8%	16,364	13,431
FIAT			
Fiat	-33.9%	2,199	3,329
Alfa Romeo	49.2%	7,426	4,977
Ferrari	-10.9%	410	460
Other	-45.5%	72	132
SUBTOTAL	13.6%	10,107	8,898
SUBARU			
	112.3%	5,007	2,359
TOYOTA			
	174.8%	5,292	1,926
HONDA			
	8.1%	9,841	9,107
ISUZU			
	-47.1%	1,332	2,520
HYUNDAI/KIA			
	117.2%	2,424	1,116
OTHERS			
	-46.5%	1,461	2,730
GRAND TOTAL IMPORT SALES			
	2.8%	276,519	269,088
(Imports from Japanese Companies)	31.0%	21,473	16,395
(Total Less Imports from Japanese Companies)	0.9%	255,046	252,693
GRAND TOTAL CAR MARKET SALES			
	3.5%	4,441,357	4,289,683

- The small/mini-car share of the Japanese car market rose by 2.1 percentage points to 84.8% for the year 2002 compared with the year 2001.
- The small/mini-car share of the import car market rose by 3.6 percentage points to 20.0%.
- 80% of imports are large cars in a market dominated 84.8% by small/mini cars.

—by MAJOR MARKET SEGMENT: JANUARY THROUGH DECEMBER 2002

		Small Car Ratio (B/A)	Total Cars (A)	Small/Mini Cars (B)	Large Cars (C)
GENERAL MOTORS					
	Chevrolet	0.0%	4,696	1	4,695
	Cadillac	0.0%	1,121	0	1,121
	Saturn	33.3%	9	3	6
	Opel	52.4%	7,846	4,113	3,733
	Saab	0.1%	1,149	1	1,148
	Other	0.0%	69	0	69
	SUBTOTAL	27.7%	14,890	4,118	10,772
FORD					
	Ford	0.2%	5,399	9	5,390
	Volvo	0.0%	15,321	2	15,319
	Land Rover	0.0%	2,209	0	2,209
	Jaguar	0.0%	5,238	0	5,238
	Aston Martin	0.0%	37	0	37
	SUBTOTAL	0.0%	28,204	11	28,193
DAIMLERCHRYSLER					
	Chrysler	0.0%	5,908	1	5,907
	Mercedes-Benz	0.0%	47,752	3	47,749
	Smart	100.0%	5,747	5,747	0
	SUBTOTAL	9.7%	59,407	5,751	53,656
VW					
	VW	27.8%	59,834	16,631	43,203
	Audi	0.1%	11,747	10	11,737
	Other	0.0%	154	0	154
	SUBTOTAL	23.2%	71,735	16,641	55,094
BMW					
	BMW	0.2%	35,924	78	35,846
	Mini	100.0%	10,075	10,075	0
	SUBTOTAL	22.1%	45,999	10,153	35,846
PORSCHE					
		0.7%	2,044	14	2,030
RENAULT					
		74.2%	2,412	1,790	622
PSA					
	Peugot	59.8%	15,162	9,063	6,099
	Citroen	28.3%	1,202	340	862
	SUBTOTAL	57.5%	16,364	9,403	6,961
FIAT					
	Fiat	98.7%	2,199	2,170	29
	Alfa Romeo	0.8%	7,426	56	7,370
	Ferrari	0.0%	410	0	410
	Other	56.9%	72	41	31
	SUBTOTAL	22.4%	10,107	2,267	7,840
SUBARU					
		0.0%	5,007	0	5,007
TOYOTA					
		0.3%	5,292	15	5,277
HONDA					
		40.7%	9,841	4,006	5,835
ISUZU					
		0.0%	1,332	0	1,332
HYUNDAI/KIA					
		13.9%	2,424	336	2,088
OTHERS					
		53.3%	1,461	779	682
GRAND TOTAL IMPORTS 2002 (12 months)		20.0%	276,519	55,284	221,235
GRAND TOTAL IMPORTS 2001 (12 months)		16.4%	269,088	44,202	224,886
GRAND TOTAL CAR MARKET 2002 (12 months)		84.8%	4,441,357	3,767,263	674,094
GRAND TOTAL CAR MARKET 2001 (12 months)		82.7%	4,289,683	3,548,194	741,489

Note: Small/mini cars—engine size 2,000 cc and below; large cars—greater than 2,000 cc. Totals include mini-car sales.

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Globalization

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