

J A I A の歩み (1996~2005)

J A I A Looking Back the Last Decade (1996~2005)

輸入車市場の動き

世界の自動車産業は、この10年間、業務提携や資本提携の枠を超えた、企業買収や合併などのグローバルな再編の動きが活発化してきました。

また、日本の自動車に関する通商・産業政策は、90年代後半までは輸入促進を旗印に、JETROによる輸入車ショウ支援や、輸入車ショールーム開設など、様々な施策が行われてきましたが、日本メーカーの欧米への進出や、中国を始めとするアジア市場が活況化する中で、日本をめぐる自動車貿易摩擦は沈静化し、政策は対日投資誘導へ転換しました。

日本における輸入車新規登録台数は、96年に過去最高の40万台を突破したのち、97年には、消費税が5%に引き上げられ、金融不安等で個人消費が低迷、日本メーカー海外生産車の輸入中止、為替レートの円安基調に伴う一部車種の価格引き上げ等により、登録台数は前年を割り込み、98年以降は現在に至るまで8年間、27万台前後で推移しています。

こういった中で、JAIAの会員数は最大時45社(98、99年)から最小時25社(04年)まで減少し、メーカー中心の組織に大きく変容しました。

最近では、京都議定書(97年)を契機とした、CO₂対策(燃費基準)導入(98年)や、ディーゼル車のNOx・PM規制強化、側面衝突基準導入など、環境・安全への社会的要請が高まりました。これに応じて、JAIAはそれまでの、流通・販売促進を中心とした活動から、環境・安全問題対応へ軸足を移し、基準の国際化、自動車リサイクルの推進などの委員会活動強化と、地方支部の廃止などの事務局スリム化を進めてきました。

Major events in Imported Automobile Market

In the last decade, the automobile industry has undergone massive restructuring, merger and acquisition on a global scale, well beyond the traditional business collaboration and capital tie-ups.

Until the late 1990s, under the banner of the government's import promotion, various measures had been taken for imported vehicles in Japan. JETRO, for instance, opened its showrooms for imported vehicles and supported a number of imported vehicle shows. The fierce trade friction gradually came to an end, as Japanese automakers established new production bases overseas and the markets in China and other Asian countries enjoyed booming sales. Consequently, the Japanese government changed its trade and industrial policies to attract more foreign investment.

New imported vehicle registrations in Japan broke the record high 400,000 units in 1996. In 1997, however, the 5% hike in the consumption tax rate and financial uneasiness triggered a downturn in consumer spending and the number of newly registered vehicles fell below the previous year. Fewer imports of vehicles produced overseas by Japanese automakers and higher prices for some imported vehicles due to a weak yen stood in the way as well. In the past eight years from 1998, the number of newly registered vehicles remains around 270,000 units.

Amid these changes, JAIA has experienced sharp drops in the number of its Members, from its peak 45 (1998-1999) to its lowest level 25 (2004), and transformed itself to become a more manufacturer-oriented association.

In recent years, in particular after the Kyoto Protocol in 1997, social demands for environment and safety kept growing, and the move led to the introduction of CO₂ measures (fuel-efficiency standards) (1998), stricter NOx and PM standards for diesel vehicles, and standards for side impact crash test. By shifting its emphasis from distribution and sales-centered activities to environment and safety issues, JAIA strengthened its Committee activities, such as international standardization and automobile recycling, and streamlined the Secretariat functions by closing its local branches.

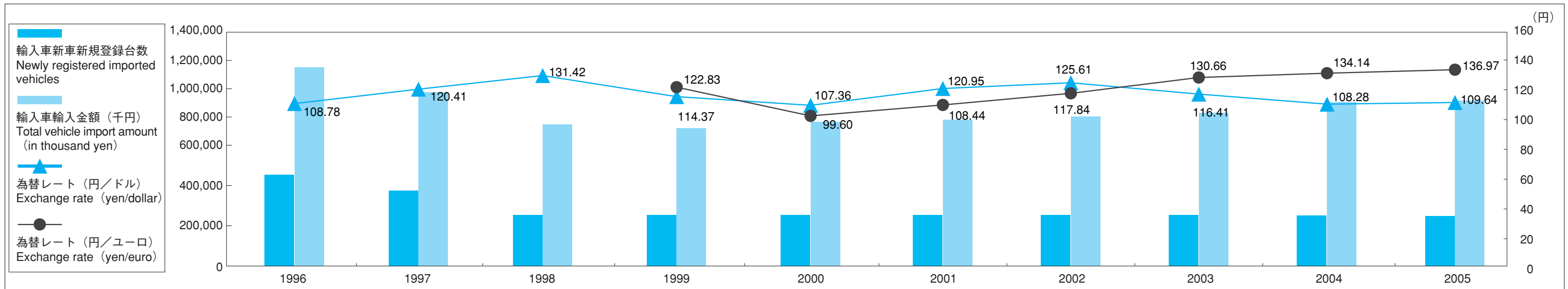
● 外国自動車産業に関する変遷 (10年間の主な動き)

1998	Daimler-BenzとChryslerが合併 Volkswagenが、Bugatti、Lamborghini、Rolls-Royce Motor Carsを買収
1999	Fordが、Volvoの乗用車部門を買収し、Premier Automotive Group (PAG)を組織、Aston Martin、Jaguar、Lincoln、Volvoを管理 Renaultが、日産自動車の株式37%を取得
2000	BMWが、Roverを売却、Land RoverはFordに売却(PAGで管理) GMが、フィアットと買収を前提とした業務提携(2004年に解消)
2003	BMWは、Rolls-Royceブランドの使用権を元に、Rolls-Royce車を生産
2005	MG・Roverは、BMWによる売却後、民族資本による経営を行っていたが、経営破綻により生産停止

● Transitions in the Foreign Automobile Industry (major events in 1996-2005)

1998	Daimler-Benz and Chrysler merged. Volkswagen acquired Bugatti, Lamborghini, and Rolls-Royce Motor Cars.
1999	Ford acquired Volvo's passenger car division and established Premier Automotive Group (PAG), combining the business operations of Aston Martin, Jaguar, Lincoln, and Volvo. Renault took a 37-percent share of Nissan.
2000	BMW sold Rover. Land Rover was sold to Ford (PAG). GM and Fiat agreed on business tie-up as the premise of merger (cancelled in 2004)
2003	BMW started manufacturing Rolls-Royce using the acquired right to the trademark.
2005	After being sold by BMW, MG Rover was running the business with national capital, but fell into bankruptcy and discontinued the production of vehicles.

10年間の変遷 Transitions in the Last Decade



	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005
輸入車新車新規登録台数 Newly registered imported vehicles	477,525	364,882	275,869	278,225	275,452	275,279	277,065	278,804	272,880	268,112
輸入車輸入金額 (千円) Total vehicle import amount (in thousand yen)	1,152,135	974,013	746,508	722,557	767,904	781,392	803,759	827,902	905,477	914,937
平均単価 (円) Average unit price (yen)	2,412,723	2,669,391	2,706,025	2,597,024	2,787,797	2,838,545	2,900,978	2,969,476	3,318,223	3,412,517
為替レート (円/ドル) Exchange rate (yen/dollar)	108.78	120.41	131.42	114.37	107.36	120.95	125.61	116.41	108.28	109.64
為替レート (円/ユーロ) Exchange rate (yen/euro)	-	-	-	122.83	99.60	108.44	117.84	130.66	134.14	136.97

理事長 Chairman	梁瀬次郎 (ヤナセ) Mr. Jiro Yanase (Yanase)				江頭啓輔 (DCJ) Mr. Keisuke Egashira (DCJ)				梅野 勉 (VGJ) Mr. Tsutomu Umeno (VGJ)	
会員数 (3月末) Number of JAIA Members (as of March 31)	42	42	45	45	43	33	29	26	25	27
海外メーカーの日本法人 Japanese arms of foreign companies	12	13	15	15	13	15	15	16	15	16
日本メーカー Japanese manufacturers	5	5	5	5	5	3	3	2	3	4
その他 Others	25	24	25	25	25	15	11	8	7	7

JAIAの動き	JAIA事務所、秀和紀尾井町TBRビルに移転 JETRO輸入車常設展示場オープン (東京・大阪・名古屋) 東京輸入車商談会開催 ユーザー対象輸入車試乗会開催	輸入車ユーザー調査を実施 東京モーターショー会場にJAIAインフォメーションコーナーを設置 特定フロン回収破壊システムへ参加 JAIA事務局の各規程及び就業規則を整備	「地方都市輸入車ショー後援要領」を制定 「輸入車登録台数日報」の電子メール配信を開始	大阪輸入車ショー、大阪モーターショーと同時開催 輸入車ユーザー調査を実施 JETROと共催で、羽田空港に輸入車を展示	JAIA理事長に江頭啓輔氏 (DCJ) が就任 JAIAホームページ開設 JAIA 3支部 (北海道、関東、中部) 閉鎖 JAIA加入金、賦課金に関する規約改正	JAIA 2支部 (関西、九州) 閉鎖 自動車リサイクルセンター運営に参画 フロン法全国説明会に説明員を派遣 「JAIAの新しい運営方針」制定 (環境・安全に重点)	JAIA/JETRO共催輸入車ショー事業終了 梁瀬JAIA名誉顧問、初代日本自動車殿堂入り 自動車リサイクルシステムのスキーム構築に参画 環境・技術委員会にリサイクルWGを設置	エアバック処理に関する会議を欧州で開催 自動車リサイクルセンターに職員を派遣 ACEAリサイクルWG訪日団との協議を開催	JETRO輸入車常設展示場 (東京) 閉鎖 梁瀬JAIA名誉顧問、米国自動車殿堂入り 自動車再資源化協力機構へ職員を派遣 環境・安全戦略会議を設置 リサイクル賦課金制度を開始	JETRO輸入車常設展示場 (大阪・名古屋) 閉鎖 JAIA理事長に梅野 勉氏 (VGJ) が就任
Milestones and Events in JAIA	JAIA Secretariat relocated its office to Shuwa Kiochi TBR Building. JETRO opened its imported automobile showrooms in Tokyo, Osaka, and Nagoya. Tokyo Imported Car Sales Fair was held. Imported Vehicle Test Rides for Users was held.	An Imported Vehicle User Survey was conducted. JAIA set up an information service booth at the Tokyo Motor Show. JAIA started participating in the CFC recovery and destruction system. JAIA Secretariat put in place employment rules, etc.	JAIA established the "guideline for supporting regional imported automobile shows." JAIA started providing the Daily Report of New Imported Car Registration via email.	Osaka Imported Automobile Show and Osaka Motor Show were held at the same time. An Imported Vehicle User Survey was conducted. JAIA and JETRO displayed imported vehicles at Haneda Airport.	Mr. Keisuke Egashira (DCJ) became JAIA Chairman. JAIA set up its website. JAIA closed its three branches (Hokkaido, Kanto, Chubu). The JAIA Bylaws on Admission Fee and Imposition were revised.	JAIA closed its two branches (Kansai and Kyushu). JAIA participated in Japan Automobile Recycling Promotion Center (JARC). JAIA sent its staff to the CFC law seminar nationwide. "The New Activities Policies of JAIA" was adopted (emphasis on environment and safety).	Imported Automobile Show sponsored by JAIA and JETRO was completed. Mr. Jiro Yanase, JAIA Honorary Adviser, was elected to one of the first members of the Japan Automotive Hall of Fame. JAIA participated in developing the scheme for the Automobile Recycling System. Recycling Working Group was set up under Environment and Technical Committee.	A conference on the disposal of airbags was held in Europe. JAIA transferred its staff to JARC temporarily. ACEA Recycling Working Group visited Japan and held a meeting on the recycling issue.	JETRO closed its imported automobile showroom in Tokyo. Mr. Jiro Yanase, JAIA Honorary Adviser, was elected to the U.S. Automotive Hall of Fame. JAIA transferred its staff to Japan Auto Recycling Partnership (JARP) temporarily. JAIA set up Environment and Safety Strategy Committee (ESSC). Membership Fee for ELV Recycling started.	JETRO closed its imported vehicle showrooms in Osaka and Nagoya. Mr. Tsutomu Umeno (VGJ) became JAIA Chairman.
社会と自動車業界の動き	自動車取得税撤廃総決起大会 橋本内閣発足 日米自動車摩擦決着	自動車免許保有者7千万人突破 消費税率5%に引き上げ 地球温暖化防止京都議定書発効	型式認証相互協定[58協定]に日本加入 軽自動車枠拡大 省エネ法改正 小淵内閣発足 使用済み自動車管理表 (マニフェスト) 導入	希望ナンバー制・分類番号3桁化スタート 車両の世界的技術規則協定 (グローバル協定) に日本加入 欧州連合、単一通貨「ユーロ」誕生	自動車リサイクルセンター設立 チャイルドシートの着用義務化 森内閣発足	フロン回収破壊法成立 ETC運用スタート 小泉内閣発足 ディーゼル車に関する規制が強化される (NOx・PM法強化)	自動車リサイクル法成立 リコール制度強化 自動車税制改革推進フォーラム結成 フロン回収破壊法本格施行	首都圏各自治体でディーゼル車規制強化 日経平均株価8千円割れ 衆議院解散総選挙	日本自動車会館開設 ITS世界会議名古屋で開催 自動車再資源化協力機構設立	自動車リサイクル法本格施行 ワンストップサービス開始 京都議定書発効 省エネ法改正
Milestones and Events in The Japanese Automobile Industry and Society	Automobile-related organizations held a rally to demand the abolition of the automobile acquisition tax. The Hashimoto administration inaugurated. Japan-US trade friction was resolved.	The number of licensed drivers exceeded seventy million people. The consumption tax rate was raised to 5%. The 3rd Session of the Conference of the Parties to the United Nations Framework Convention on Climate Change (COP3) was held in Kyoto.	Japan acceded to the UN/ECE 1958 Agreement on Mutual Recognition of Type Approval for Vehicles. The Kei-vehicle standard was relaxed. The Energy Conservation Law was revised. The Obuchi administration inaugurated. The End-of-Life Vehicle Management List (manifest system) was introduced.	Open number-plate system started and the classification number was made into 3 digits nationwide. Japan acceded to the Global Vehicle Technical Agreement of UN (Global Agreement). The euro was introduced to world financial markets.	The Japan Automobile Recycling Promotion Center was founded. The use of child safety seat became mandatory. The Mori administration inaugurated.	The Law for CFC's/HFC's Recovery and Destruction was enacted. ETC system was launched. The Koizumi administration inaugurated. The standards for diesel vehicles were strengthened (The Automobile NOx and PM law was enhanced).	The Automobile Recycling Law was enacted. The recall system was strengthened. Automobile Taxation Reform Forum was established. The Law for CFC's/HFC's Recovery and Destruction was fully enforced.	The prefectural governments in the capital region strengthened the emission standards for diesel vehicles. The Nikkei Stock Average plunged below 8000. The Lower House was dissolved for a snap election.	Jidousha Kaikan (Japan Automobile Hall) was opened. The ITS World Congress was held in Nagoya. Japan Auto Recycling Partnership was founded.	The Automobile Recycling Law was fully enacted. One Stop Service (OSS) was launched. The Kyoto Protocol came into effect. The Energy Conservation Law was revised again.

●輸入車 課題への対応（1996－2005）

輸入車は90年代初めより衝突安全対策（リア3点式シートベルト、エアバッグ、シートベルトプリテンショナー等）を積極的に採用してきた。特にエアバッグの採用は国産車より早く、日本市場におけるエアバッグの普及に貢献した。また、この10年間においては、安全・環境・エネルギーに対する社会的要求が高まり、輸入車業界も対応することが課題となってきた。特にこれらの規制は、クルマ単体のみならず、生産、物流、販売を含む社会システムでの対応を要求される。こうした課題に対して、輸入車は、エンジンや本体技術に加えて、電子技術、情報通信技術を導入して対応してきた。

	①トレンド	②規制・制度	③新技術・製品
1. 安全対策	従来の衝突安全（パッシブ・セーフティ）の充実に加えて、事故を未然に防ぐための装備（アクティブ・セーフティ）の開発、普及促進へ	側面衝突導入（00年）、チャイルドシート着用義務（00年）、歩行者頭部保護規制（05年）	サイド/カーテンエアバッグ、トラクションコントロール、ABS、ESP、車線逸脱回避操舵支援装置、車線逸脱警報装置、車間距離自動維持システム、衝突被害軽減ブレーキ装置
2. 環境保全・省エネ対策	大気環境改善からオゾン層保護、地球温暖化防止へ 代替エネルギー車の開発 リサイクル、不法投棄/不適正処理の防止、環境負荷物質の削減	排気ガス規制（短期規制—長期規制—新短期規制—新長期規制）、NOx・PM法（01年、大都市地域で導入）、フロン回収破壊法（02年）、京都議定書（97年）、日本温暖化防止大綱、燃費基準値、自動車燃費性能評価公表制度（98年）、京都議定書目標達成計画（05年）自動車リサイクル法（05年）	DPF、コモンレール、希薄燃焼エンジン、ハイブリット車、燃料電池車
3. 快適性・利便性の向上	情報通信技術やエレクトロニクス技術を活用したITSの発達	電波法	ETC、VICS、ナビゲーションシステム

●Meeting Challenges Facing Imported Vehicles (1996-2005)

Since the early 1990s, overseas manufacturers have been actively taking collision safety measures (e.g. rear three-point seatbelt, airbag, seatbelt pretensioner, etc.). Especially for airbag, imported vehicles made a great contribution to the Japanese market, by introducing the device earlier than domestic vehicles.

Furthermore, social demands for safety, environment, and energy have been growing in the last decade, and the imported vehicle industry must meet these challenges.

In order to ensure compliance with the applicable regulations, the industry is expected to take action not only on vehicles but also at the social system level including production, distribution, and sales. Vehicle manufacturers have been introducing electronics, information and telecommunication technology, in addition to engine and other vehicle technologies, to tackle the challenges.

	1) Trends	2) Regulations & Standards	3) New Technologies & Products
1.Safety measures	Development and promotion of the devices to prevent accidents (active safety), in addition to reinforcement of the traditional collision safety (passive safety)	Introduction of side impact crash test (2000), Mandatory use of child safety seat (2000), Pedestrian Head Protection Standard (2005)	Side/Curtain airbag, Traction control system, ABS, ESP, Steering support for prevention of lane departure, Lane departure warning system, Automated following distance control driving system, Collision mitigation brake system.
2.Environmental conservation & energy-saving measures	From the improvement of air quality to ozone layer protection and global warming prevention. Development of alternative energy vehicles. Recycling, Prevention of illegal dumping/inappropriate disposal, reduction of environmental hazardous substances.	Emission Standards (Short-term-Long-term-New Short-term-New Long-term), Law Concerning Special Measures for Total Emission Reduction of Nitrogen Oxides and Particulate Matter (implemented in big cities in 2001), Law for CFC's/HFC's Recovery and Destruction (2002), Kyoto Protocol (1997), Outline for Promotion Effects to Prevent Global Warming, Fuel-efficiency standards, System for evaluation and public disclosure of motor vehicle fuel consumption performance (1998), Kyoto Protocol Target Achievement Plan (2005), Automobile Recycling Law(2005).	DPF, common-rail, lean combustion engines, HEV, FCV.
3.Improvement in comfort and convenience	Development of ITS linked with information and telecommunication technology and electronics technology.	Radio Law	ETC, VICS, navigation system.

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