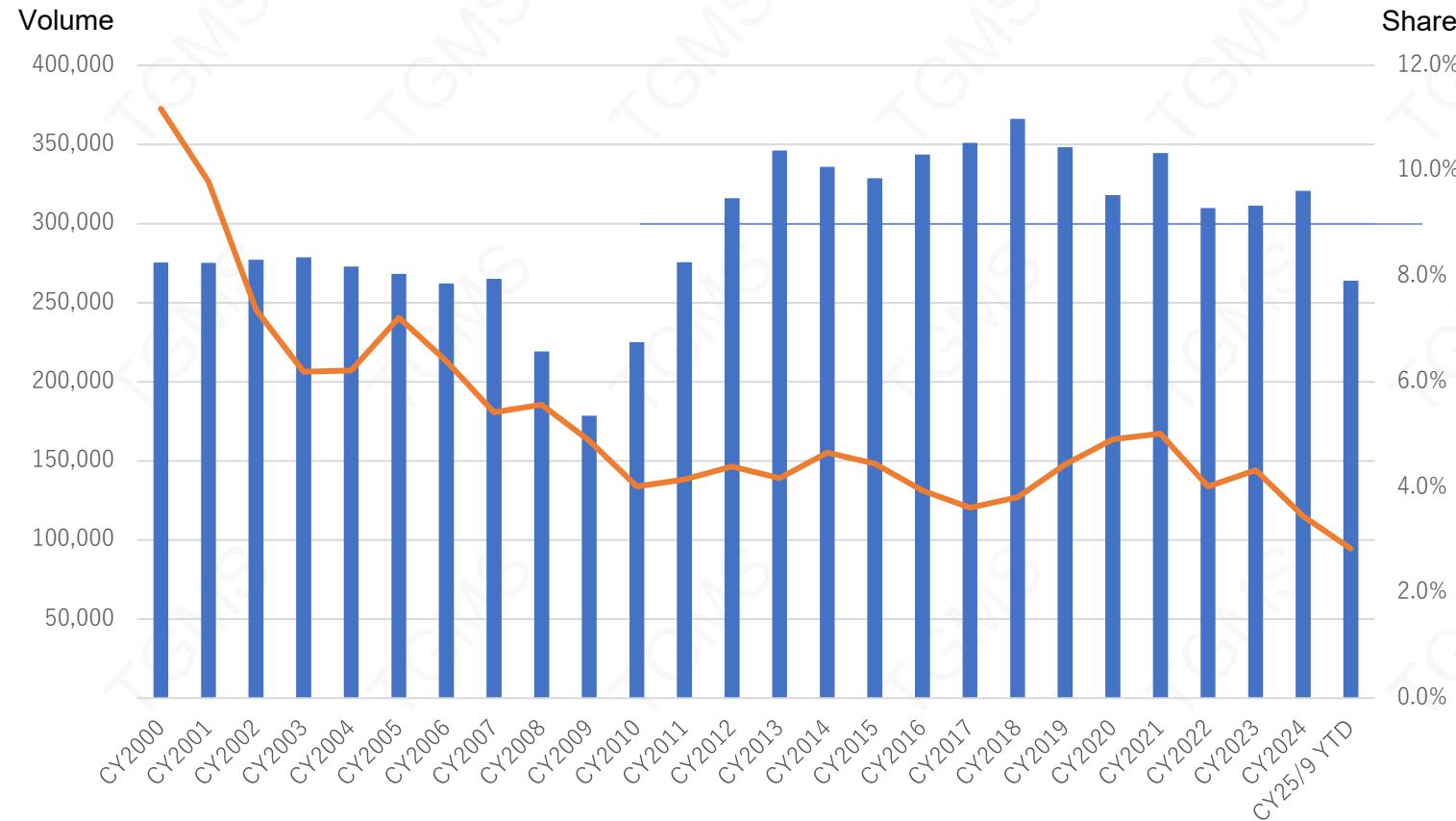
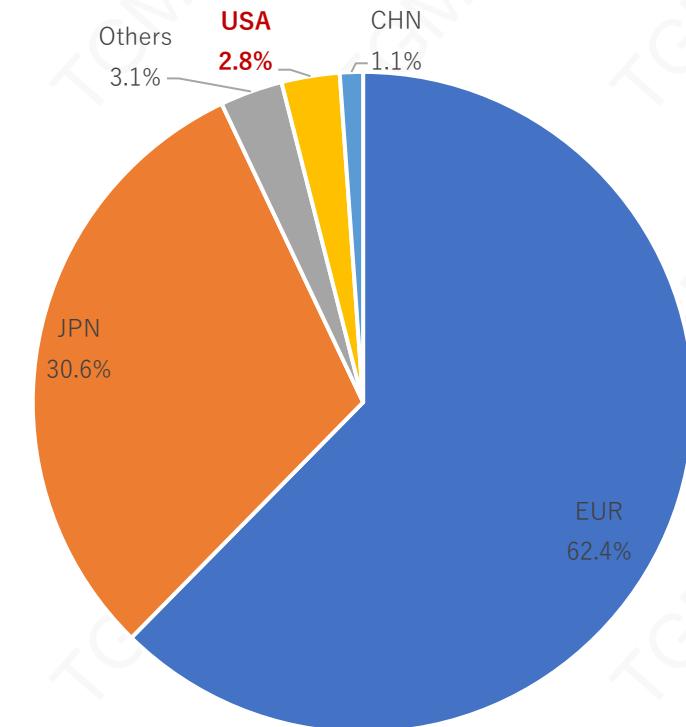


Japan Import Industry – Volume History / Brand Origin Mix

History - Import Volume / Share Of USA Source Of Origin (SOO)



SOO Mix



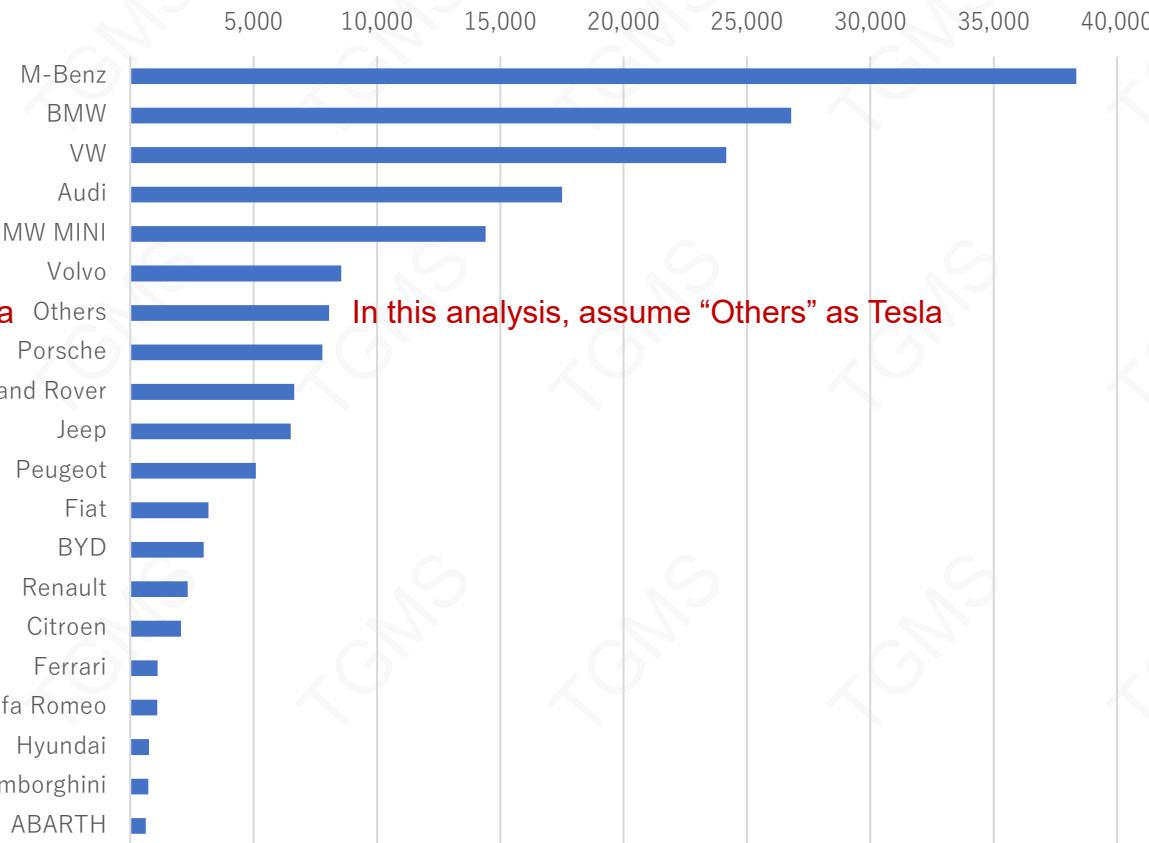
Note: In the JAIA report, Tesla's volume is not specified separately and is included under "Others."

Source: JAIA

- Japan Import Industry Stable At 300k++ Regardless Of Exchange Rate / Economic Conditions Since Last Decade
 - CY25/9YTD, USA Source Of Origin Mix 2.8% (If Assuming "Others" As Tesla, USA Mix Could Be 5.9%)

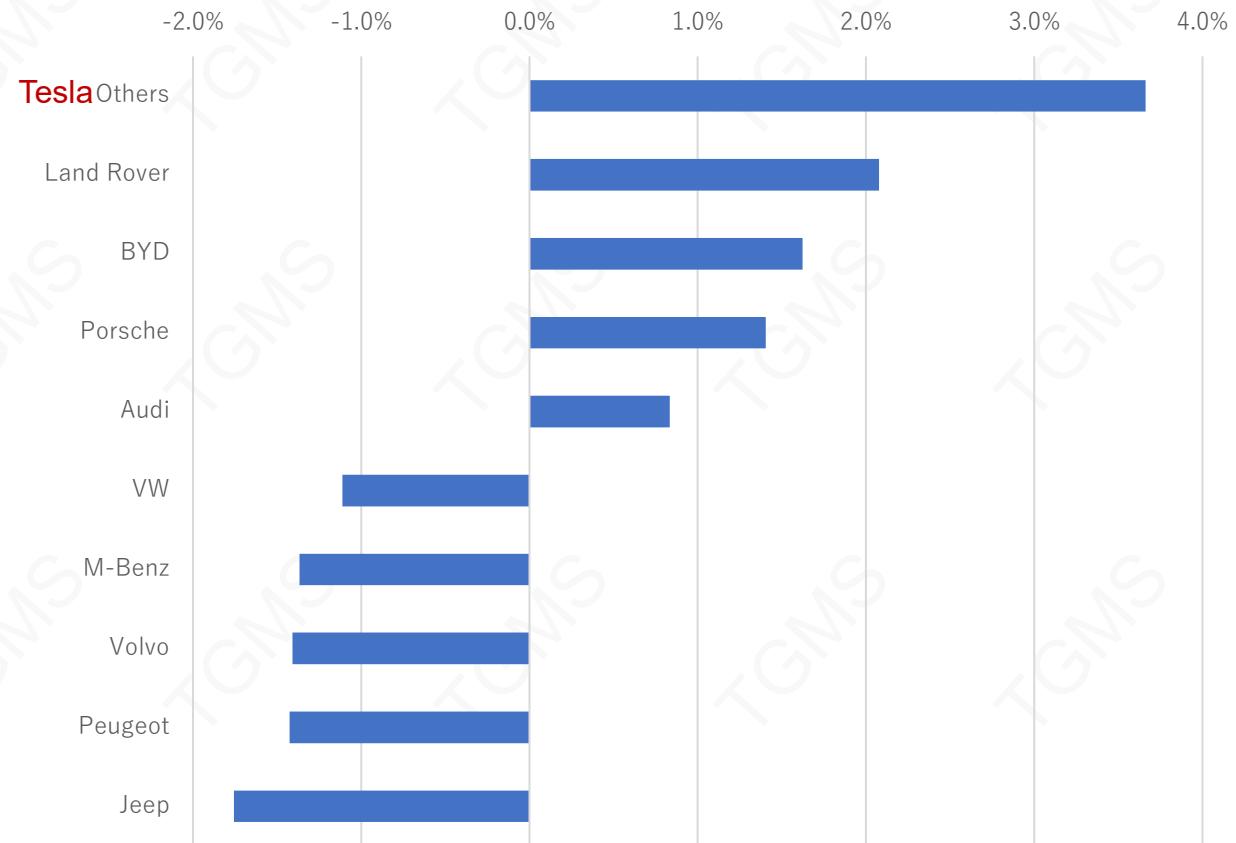
Japan Import Industry Brand Ranking (CY25/9YTD)

Top 20 Brands



In this analysis, assume “Others” as Tesla

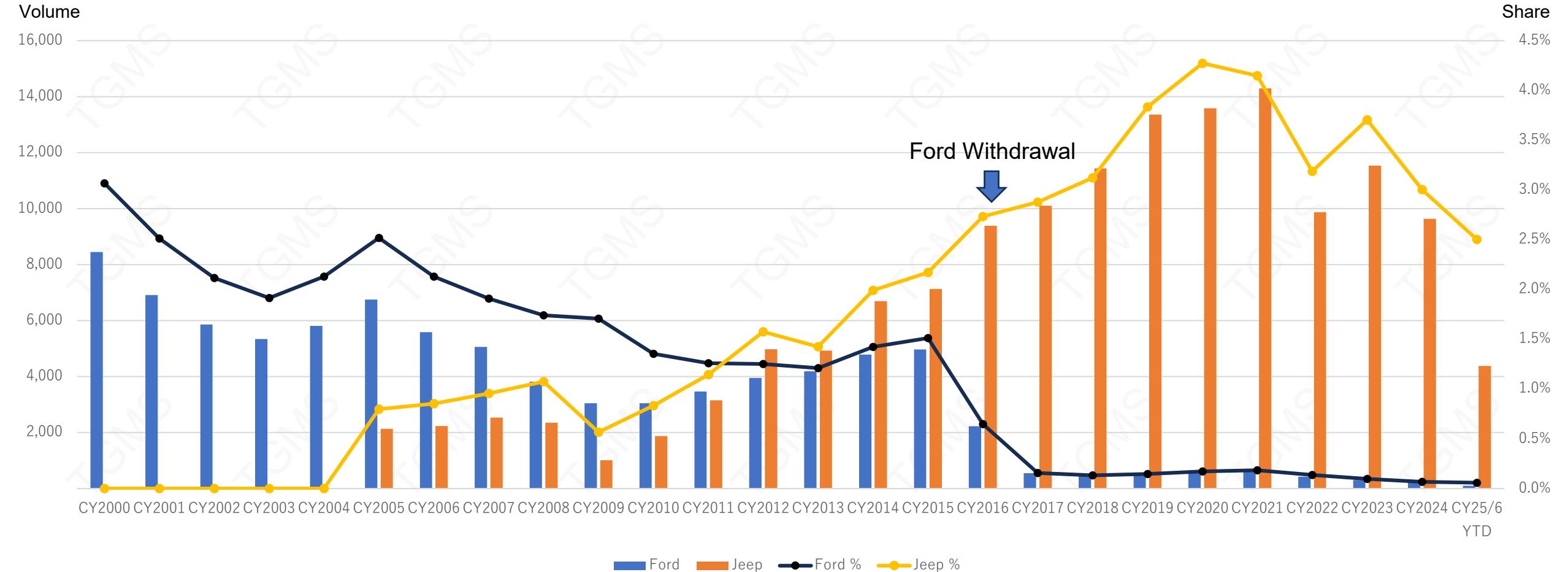
Winner / Loser CY25 VS. CY20



Source: JAIA (Excl. Japanese OEM reimportation)

- Top 5 dominated by Europe premium brands
- Tesla (#7) was the No.1 Winner vs. Jeep (#10) was the Worst Loser (CY25 vs. CY20)
 - BYD (#13) No.3 Winner vs. Hyundai is struggling

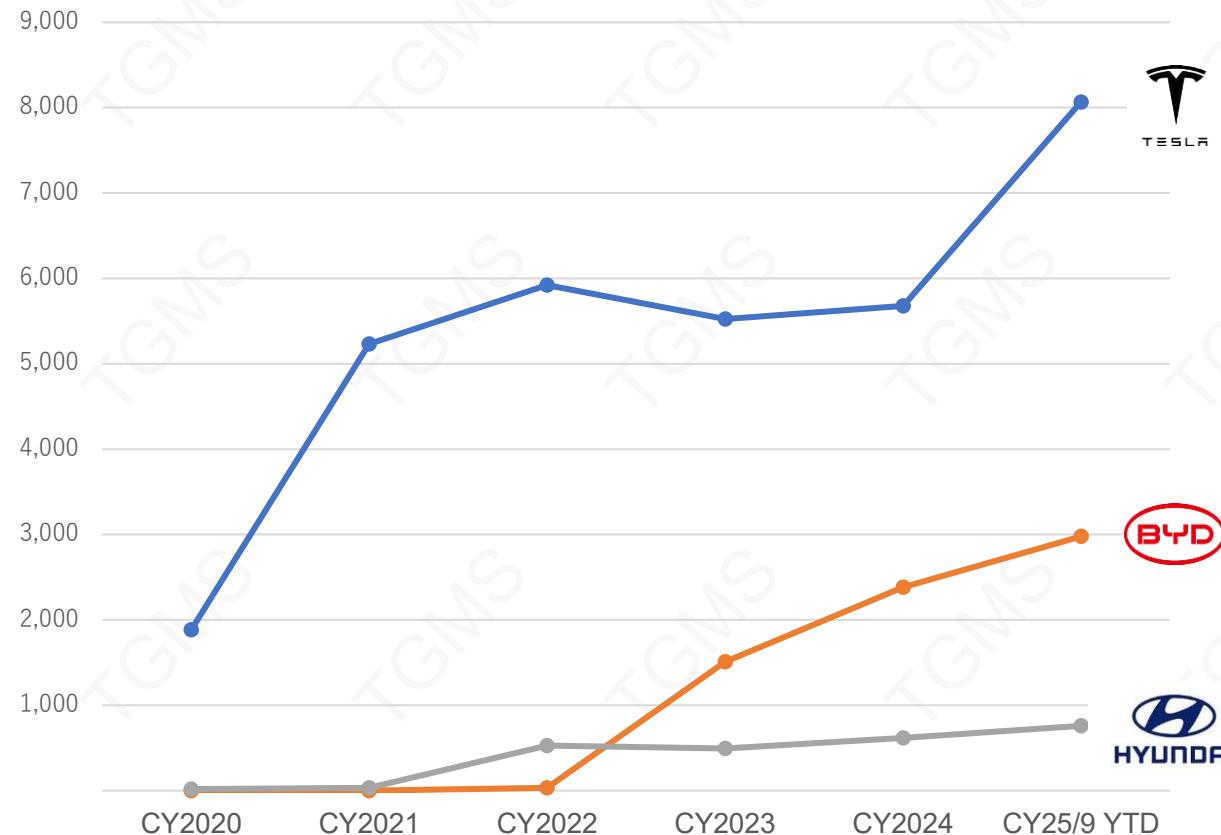
Ford VS. Jeep



- Ford Maximum Sales Volume Was 8.4k With 3.1% Share In CY2000
- Since Ford Withdrawal In CY2016, Jeep Is Expanding Its Volume And Share (Max Vol: 14k / Shr: 4%+)
 - Ford Still Constantly Selling 200 – 300 UPA Through Grey Import Since CY2016

Japan – New Entrant Brands’ Performance

Volume History Since CY20 (Tesla / BYD / Hyundai)



Key Metrics Comparison

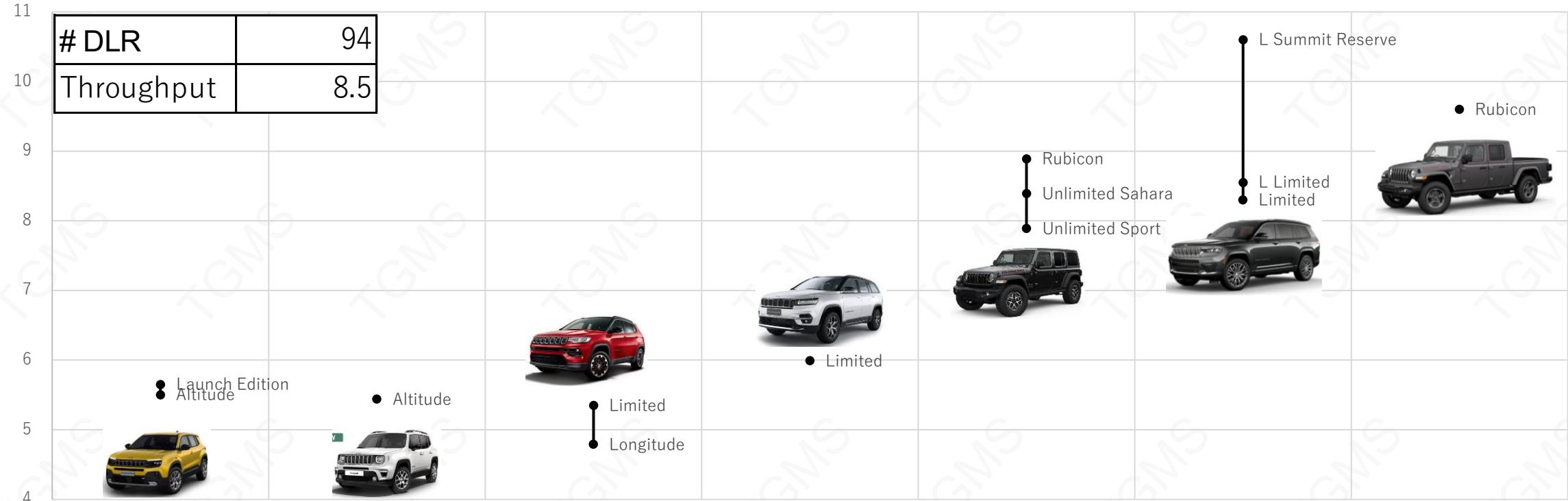
	Tesla	BYD	Hyundai
CY25/9YTD Volume	8.1k (#7)	3.0k (#13)	0.8k (#18)
# Models	5	4	5
#Dealers	25	66	HQ showroom x1 Experience Center x 2 City Store x 5 Total: 8
Fixed Marketing	Small	Large	Small

Source: JAIA (Assume “Others” as Tesla) / Websites

- Recent new entrants in Japan — Tesla, BYD, and Hyundai — are all offering BEVs.
- Tesla, supported by recent price realignments, is performing strongly.
- BYD has reached nearly 3,000 units since its CY22 launch, driven by strong fixed marketing and a growing dealer network (targeting 100+ outlets).
- Hyundai continues to face challenges with its experience center and online sales model.

Jeep In Japan Price Spider

MSRP JPY Mills



	Avenger	Renegade	Compass	Commander	Wrangler	Grand Cherokee	Gladiator
OAL	4,105	4,255	4,420	4,770	4,870	4,900-5,200	5,600
CY24 Vol	263	1,746	1,034	1,880	3,294	1,233	88
Mix	2.8%	18.3%	10.8%	19.7%	34.5%	12.9%	0.9%

- Jeep Offering SUV Full Lineup + Gladiator / Model Mix Is High For D+SUV

Ford's Brand Still Lives in Japan — Even After Market Withdrawal



Article: Ford x Japanese Apparel GU collaboration clothes to be released on November 10, 2025 (GU Ford)

- Enjoy an American casual style with a lineup of items featuring GU's classic heavyweight sweatshirts, featuring Ford logos and graphics.

Key Insights:

- GU (Fast Retailing Group) launched Ford-logo apparel collaboration
- Ford exited Japan in 2016
- Still perceived as iconic “American Cool” brand
- Street casual + Heritage branding = youth appeal

<https://www.fullress.com/gu-ford/>

Strategic Implication: Even after exit, brand equity can maintain market relevance and create future entry pathways for U.S. OEMs in Japan.