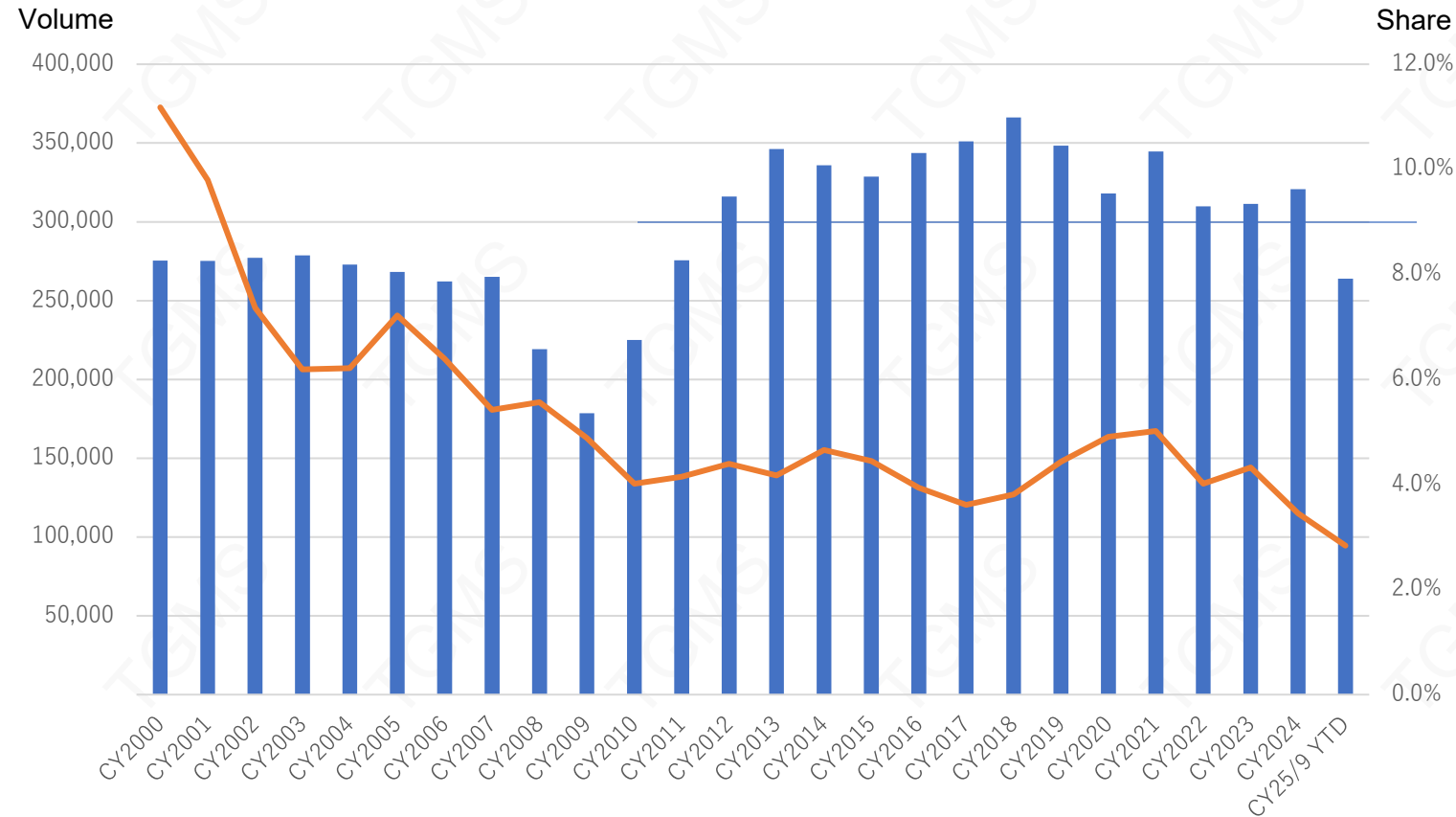
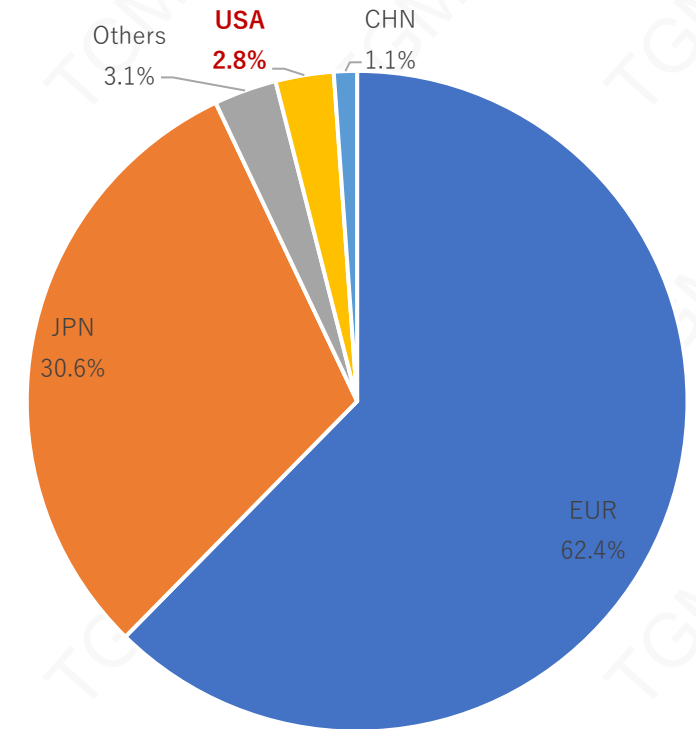


Japan Import Industry – Volume History / Brand Origin Mix

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



SOO Mix



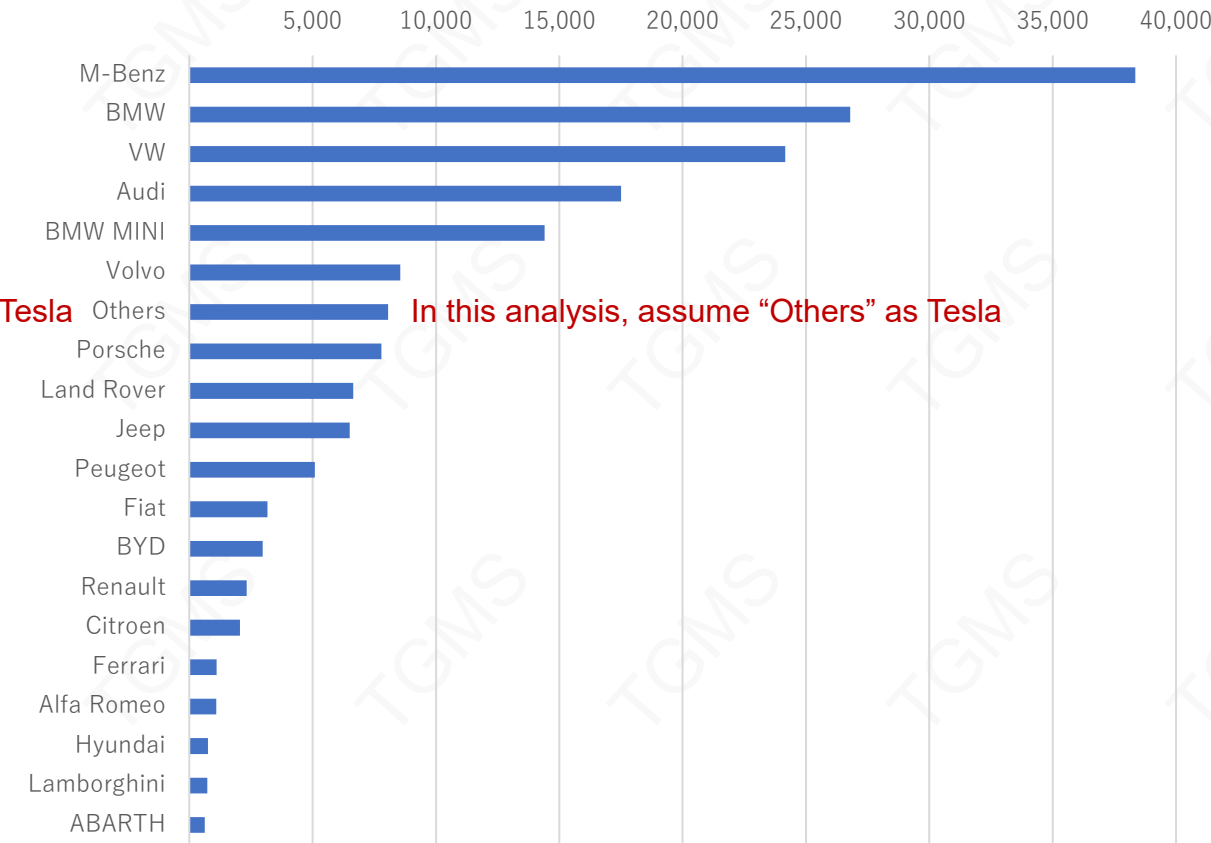
Note: In the JAIA report, Tesla's volume is not specified separately and is included under "Others."

Source: JAIA

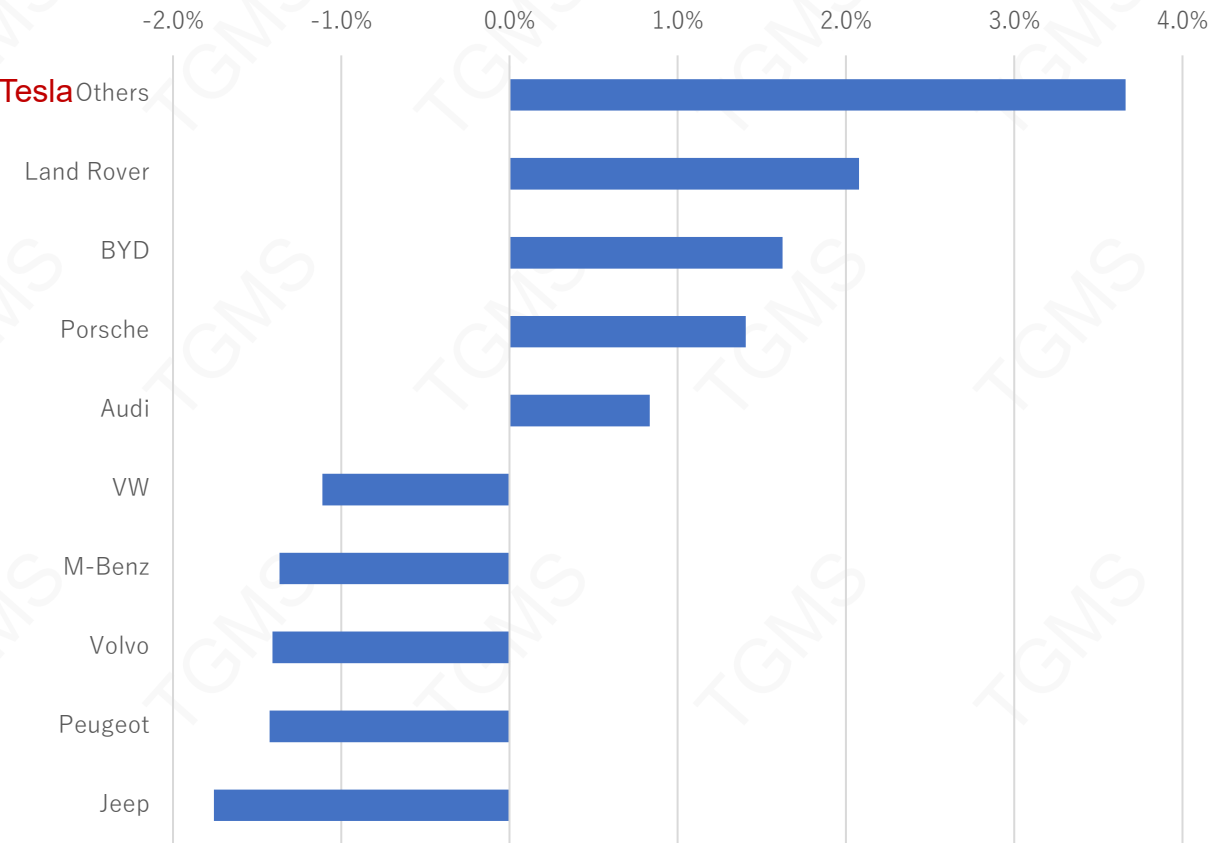
- Japan Import Industry Stable At 300k++ Regardless Of Exchange Rate / Economic Conditions Since Last Decade
 - CY25/9YTD, USA Source Of Origin Mix 2.8% (If Assuming "Others" As Tesla, USA Mix Could Be 5.9%)

Japan Import Industry Brand Ranking (CY25/9YTD)

Top 20 Brands



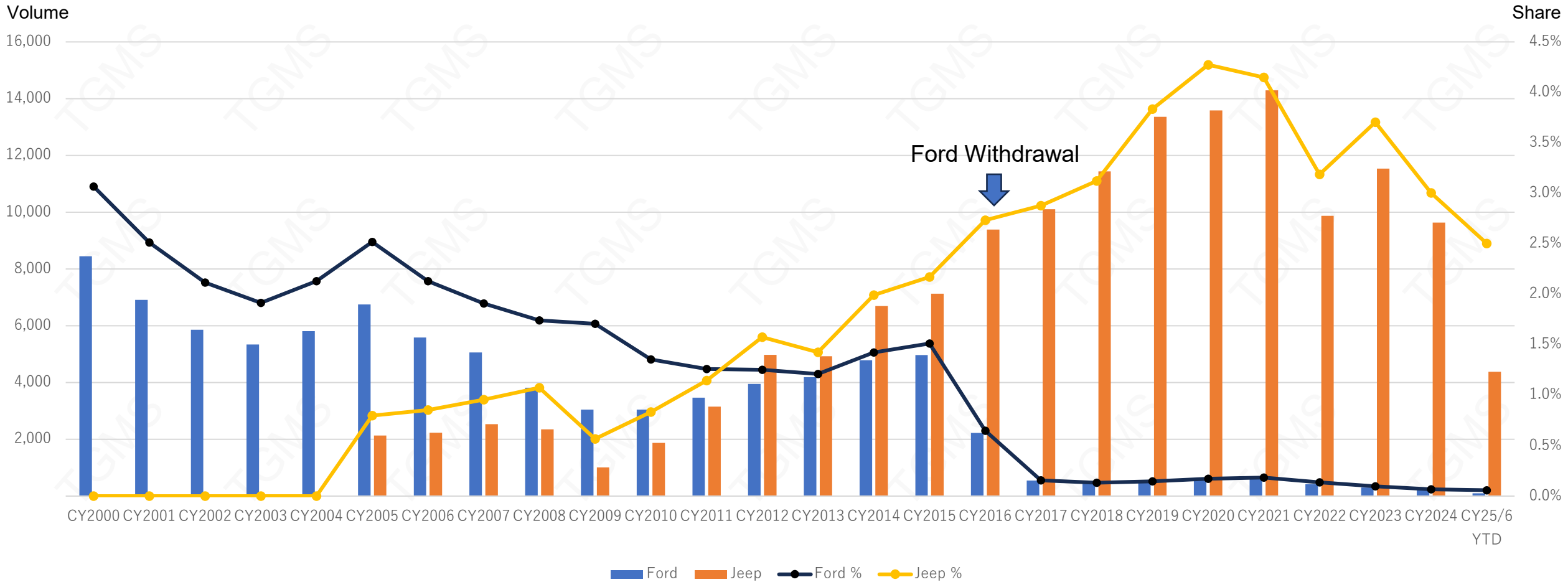
Winner / Loser CY25 VS. CY20



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

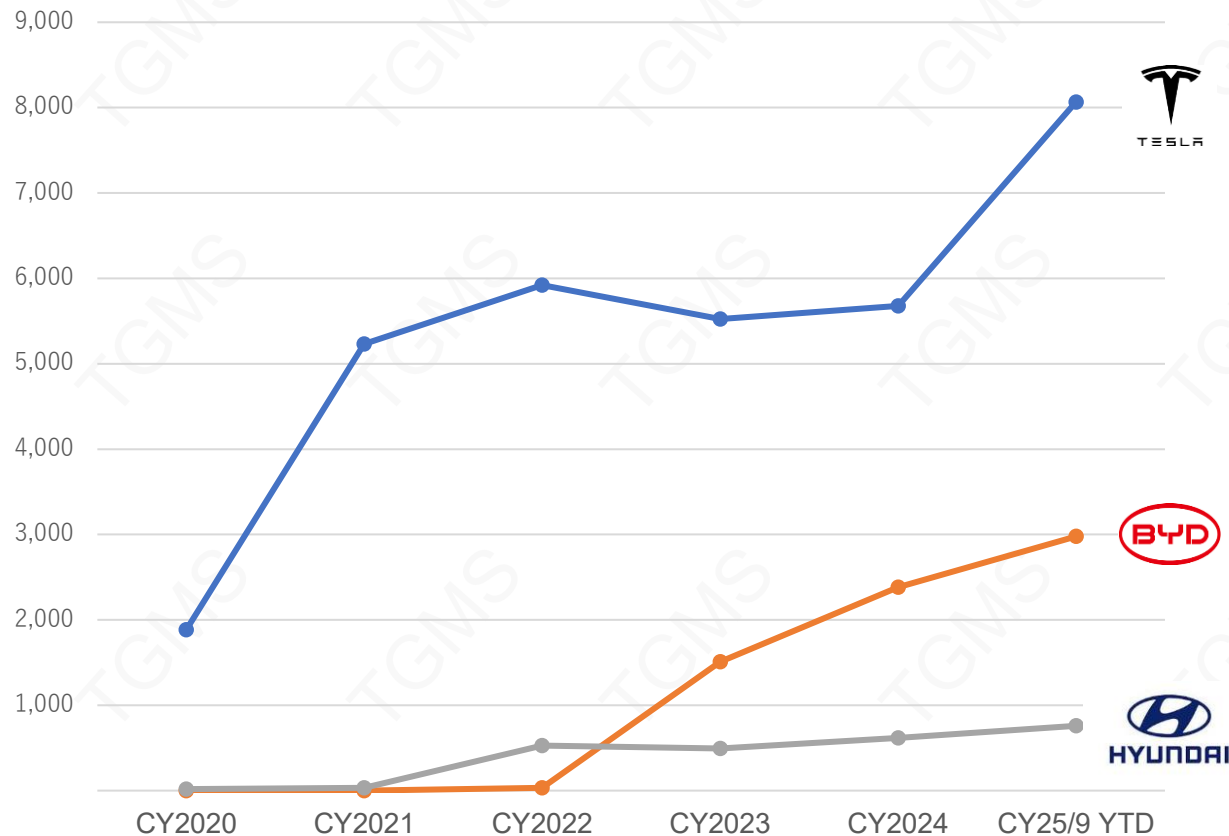
Ford VS. Jeep



- 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

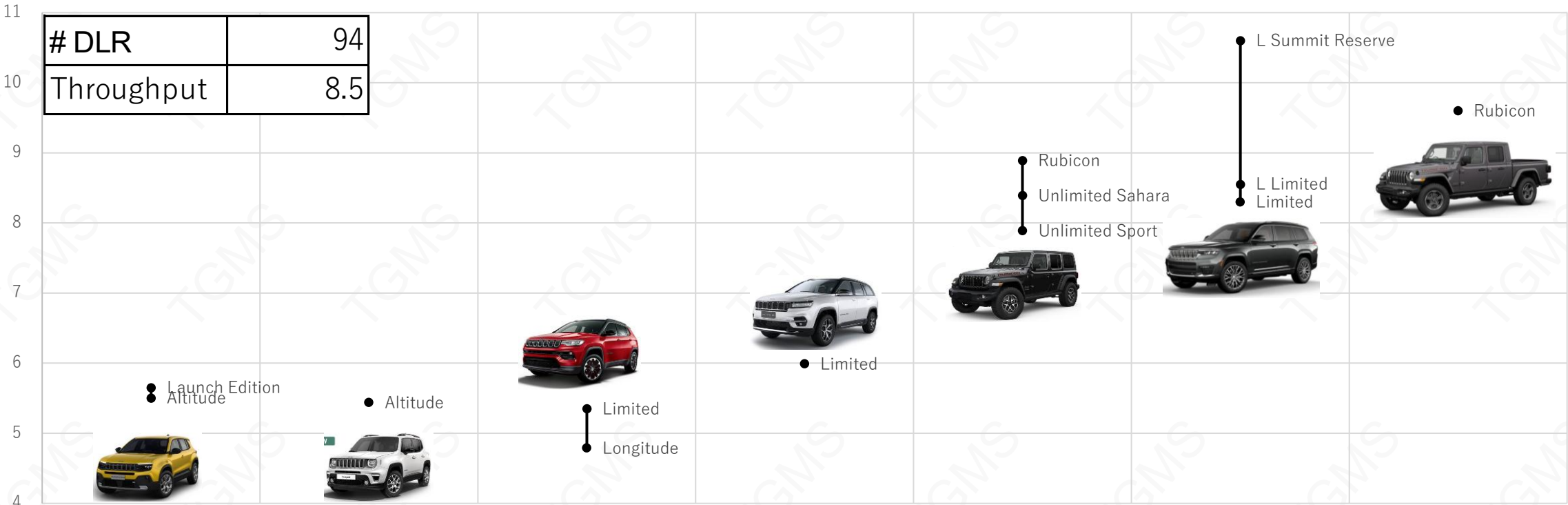
| | Tesla | BYD | Hyundai |
|------------------|-----------|------------|---|
| CY25/9YTD Volume | 8.1k (#7) | 3.0k (#13) | 0.8k (#18) |
| # Models | 5 | 4 | 5 |
| #Dealers | 25 | 66 | HQ showroom x1 Experience Center x 2 City Store x 5 Total: 8 |
| Fixed Marketing | Small | Large | Small |

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 Mils



| | 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 | 9,538 |
| 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.