

## **Journée du GERPISA n°207, Pro Asian Competitiveness in Perspective**

**Vendredi 10 janvier 2013, 14h-17h**

**ENS Cachan, bât. Laplace, 4ème étage, salle de reunion, ISP**

61, avenue du Président Wilson, Cachan

(RER B, Bagneux)

### **Competitiveness of the Japanese, Korean and Chinese Automobile Industries**

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There is no need to stress that the East Asian automotive industry (China, Japan, South Korea) became in the past years a leading region, greatly determining the future of the worldwide industry. What is more important is to characterize the structures and the specificities of those three industries, not only from the point of view of national carmakers, but examining also the industries as a whole, which is the aim of this communication. What makes the competitiveness of Chinese, Japanese and Korean industries? To compare their competitiveness, in terms of production, export and imports, we propose a methodology distinguishing production country base and maker base' indicators. The indicator of production country base includes the domestic production of both domestic makers and foreign makers, whereas the maker base covers the worldwide production and sales of domestic makers. This makes appear very contrasted trajectories, especially when we shed light on the export capabilities of these three industries, and the degree of dependency to their domestic markets and carmakers, as well as their domestic market and sales volumes and structures. As a matter of fact, it implies several questions about the international division of labour in this region in the coming years, and especially the capability of China to compete with Korea and Japan as an export-oriented economy.

# **Japan's Automobile Market between Transition and Transformation**

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For some time in 2009 it seemed as if the financial crisis could lead to a profound restructuring of the automobile industry. As we now know, the structure of the global automobile industry hasn't changed dramatically. However, the question remains, whether as a result of the financial crisis consumer behavior has changed with regard to the purchase of automobiles. To answer this question, my presentation will investigate developments in the Japanese automobile market with regard to changing social and economic conditions over the last two to three decades. It will be analyzed, whether and, if yes, how the traditional national pattern of income distribution has changed, and how these changes influenced the market for automobiles. In particular it will be examined what influence the financial crisis of 2008 really had on Japan's automobile market. We will see, that the Japanese car market has some very unique peculiarities. It will also be shown that the main driving factors for the development of the car market are (1) the demographic change of Japan's population; (2) the burst of the bubble economy in the mid 1990s, and finally (3) changing attitudes of young people towards cars. The crisis did not alter the long-term development course of Japan's car market as it can be observed since the 1990s. It, however, seems as if the financial crisis has accelerated the already proceeding shift towards ecological friendly cars and towards new forms of sustainable mobility.