



Business Report

MarkLines Co., Ltd.

Message from CEO

I would like to start by expressing my sincere appreciation for your continued support and patronage.

At MarkLines, we operate the Automotive Industry Portal, which offers comprehensive solutions dedicated to the automotive industry through seven businesses centering on the Information Platform. The platform is currently used by more than 5,300 companies in approximately 50 countries around the world.

In 2023, the automotive industry's recovery in automobile sales and production became clearer as supply chain disruptions resulting from factors such as the semiconductor shortage came to an end. At the same time, the industry continues to undergo significant changes, with software and AI becoming crucial elements in automobiles. In such an environment, we are striving to provide even higher value-added services by deepening collaboration among our businesses, including the Information Platform, to serve as a compass for participants in the industry.

In these endeavors, I would sincerely appreciate your continued support and guidance.

March 2024

Makoto Sakai
President & CEO



News & Topics

New Benchmark Center to open in summer 2024

Against the backdrop of electrification and autonomous driving, and other structural changes in automobiles, we are building a new Benchmark Center in Atsugi City, Kanagawa Prefecture, with the aim of offering our customers more specialized reverse engineering services. The Center is scheduled for completion by the end of July 2024, and once in operation it will offer new services such as vehicle teardown, measurement, and preparation of CAD data and teardown analysis reports, in addition to vehicle and parts procurement agency services and cost comparison analyses.



Rendering of the New Benchmark Center

About MarkLines

1 Comprehensive solutions dedicated to the automotive industry

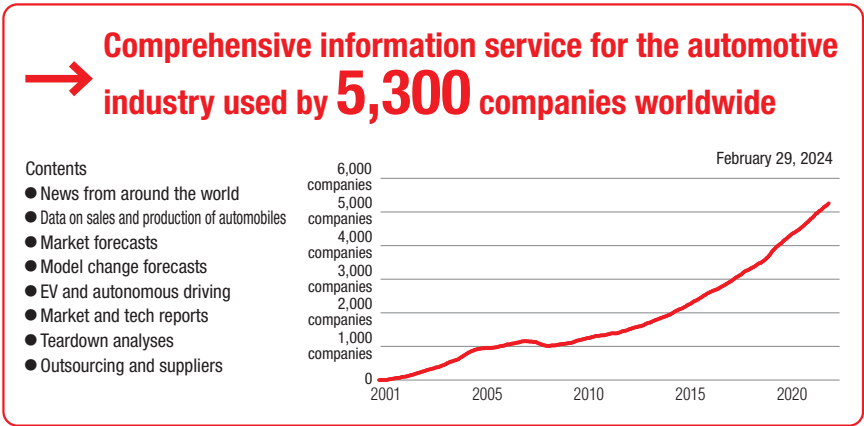


The Group operates the Automotive Industry Portal, which offers total solutions through seven services: the "LINES" advertising and promotion service, consulting and research, reverse engineering, executive search, market forecasts, and the Automotive Industry Support Fund, centering on the Information Platform as our core service.

We are able to provide services tailored to the specific needs of individual customers, covering the domains of automotive industry-centered information, know-how, human resources, products, and financing.

2 Information Platform corporate subscribers total over 5,300 companies

More than 5,300 corporate users of the Information Platform span a variety of industry sectors ranging from OEMs and parts suppliers to trading companies and research institutions. As the automotive industry is currently in the midst of experiencing a tide of new technologies such as electrification, autonomous driving and artificial intelligence, the entry of new players from other industries is broadening the base of the automotive industry.



3 Information Platform is used in 50 countries worldwide

As the automotive industry becomes increasingly borderless, our Information Platform is currently being used in many countries and regions, including Japan, China, North America, Europe, ASEAN, and India, totaling 50 countries worldwide.



MarkLines Services



Information Platform

Outline of services

The automotive industry's operating environment is changing dramatically as efforts to achieve carbon neutrality progress. The Information Platform is a subscription-based online service that collects and provides a wide range of market, technology, and supplier information from around the world via our seven global offices, which permits us to view these changes from a heightened perspective.

《Features》

Outstanding cost effectiveness

The Information Platform provides a variety of content in three languages (Japanese, English, and Chinese), including information on component suppliers, supply chain, production and sales volume data, market and technology reports, model change forecasts, and news from around the world. Only the MarkLines Information Platform can provide access to this wealth of content regardless of time or location.

Annual Service Fees for the Information Platform Service

Number of users	JPY	USD	EUR	CNY	GBP
Up to 2	600,000	5,100	5,100	36,000	4,200
Up to 4	780,000	6,300	6,300	45,000	5,400
Up to 10	1,200,000	10,200	10,200	72,000	8,400
Up to 20	1,800,000	15,300	15,300	108,000	12,600
Unlimited	2,400,000	20,400	20,400	144,000	16,800

《Introduction of Information Platform and Content》

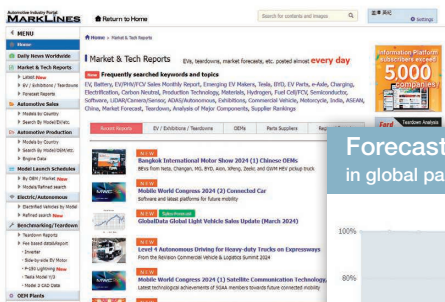
Information on exhibitions



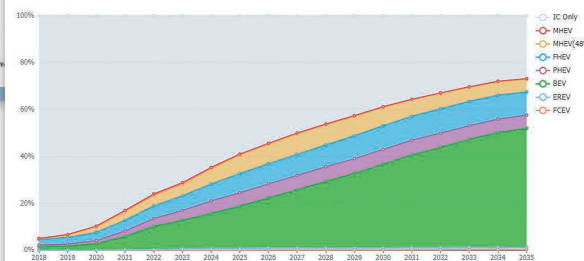
Teardown analysis data



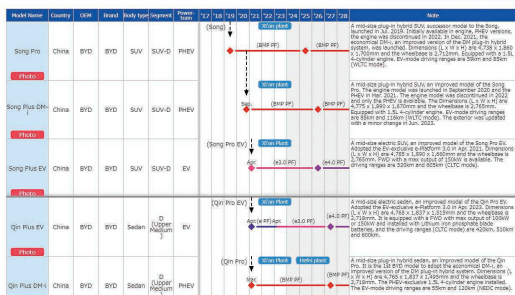
Market and tech reports



Forecast of the share of each powertrain in global passenger vehicle sales



Model change forecasts



Sign up for a free trial

https://www.marklines.com/en/members/sign_up





Outline of services

“LINES” effectively supports our clients’ sales promotion initiatives. Through this service, clients can promote their products, technologies, and services to Information Platform members via promotional emails, banner ads, and the posting of product information on the MarkLines website.

《Features》

Direct PR for executives and managers

- The Information Platform has about 400,000 users at over 5,300 automotive industry companies.
- More than 5 million page views per month
- All OEMs and tier 1 suppliers in Japan are corporate members of the Information Platform.

Promotional Emails

Service for the direct distribution of up to 50,000 emails to Information Platform members to promote client products and services.

Banner Ads

Service for placing banner ads on the Information Platform.

Posting of Product Information

Service for posting client product information on various pages of the Information Platform.



Market Forecasts

Outline of services

MarkLines provides forecast reports on the automotive market that are prepared by GlobalData, a UK market research company. Data including worldwide automotive sales forecasts for the next seven to twelve years are available by powertrain (EV/FCV/PHEV/HV) and by model.

《Features》

1. Detailed forecast data

- Detailed volume forecasts are available by model, by electric vehicle type, etc.

2. Reasonable pricing

- Detailed forecasts are available at reasonable prices.



Consulting

Outline of services

With the needs of a diverse range of clients in mind, our services include consulting on topics related to the increasingly important and evolving EV technologies, market research, testing of ADAS and HMI technologies, and more. We offer high value-added services leveraging our accumulated wealth of industry information, singular expertise, and our network of internal and external industry experts.

《Features》

We can respond to a wide variety of projects leveraging the knowledge and expertise we have accumulated over the years.



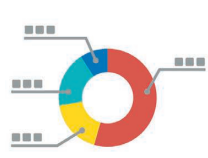
Technical research



Testing



Market research



Supplier surveys



Support for introduction of model-based development (MBD)



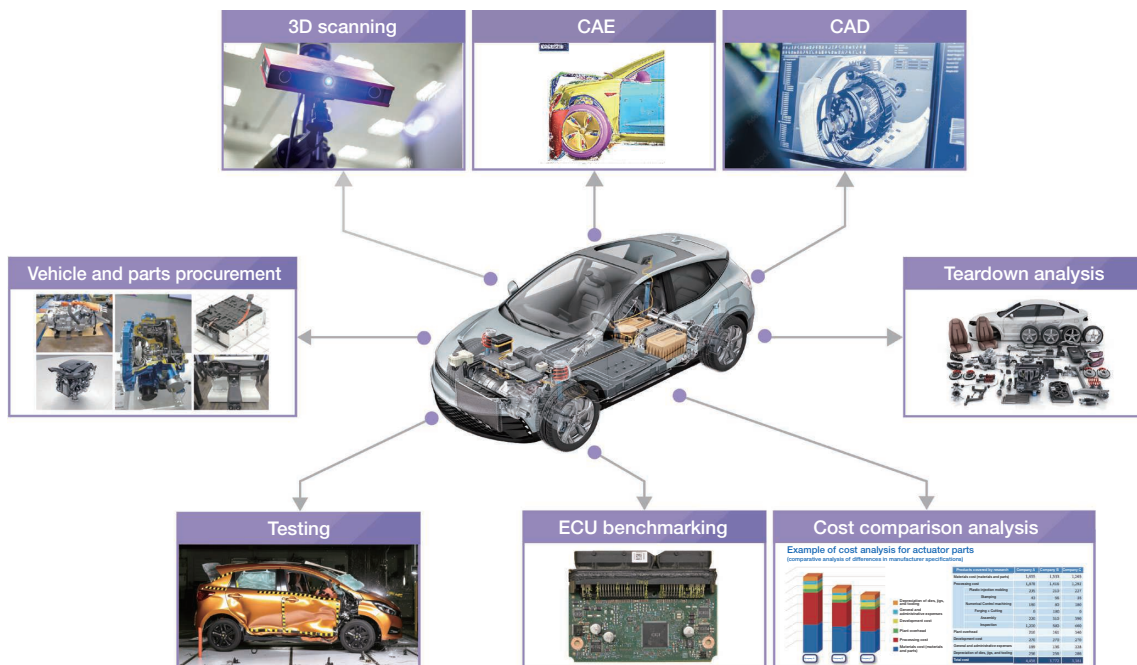
Patent analysis



Reverse Engineering

Outline of services

MarkLines provides integrated reverse engineering services encompassing vehicle procurement, testing, teardown analysis, 3D scanning, CAD/CAE data preparation, cost comparison analysis, and ECU benchmarking.



Executive Search

Outline of services

MarkLines' executive search service specializes in matching automotive industry talent. Leveraging our networks and jobseeker database, our consultants, who have obtained extensive experience in the automotive industry, match client needs to identify and introduce excellent candidates in various areas such as engineering, sales and marketing, administration, and planning.

《Features》

1. Consultants with automotive industry expertise

- Drawing on their deep insight into the automotive industry, our consultants provide a precise and detailed service that meets our clients' needs.

2. Candidate search using our extensive network

- We introduce optimum candidates utilizing the unique MarkLines network and from the multitude of jobseekers registered in external databases.

3. Handling all types of recruitment in the automotive industry

- We handle the full spectrum of recruitment consultation related to the automotive industry, covering all positions (executive, middle management, and superintendent levels) and job category (e.g., technical, sales, management, planning).



Automotive Industry Support Fund

Outline of services

The Automotive Industry Support Fund provides financing for the following businesses: (1) ventures that have the potential to create new technologies and make a significant contribution to the automotive industry of the future; and (2) medium-sized companies with a long history that are looking to re-grow through their own innovation.

《Features》

1. Venture capital specializing in the automotive industry

- Enabling the utilization of the "knowledge and information," "networks," and "customers" that MarkLines has accumulated to date.

2. One-stop support for the automotive industry

- Enabling one-stop support, including financing, at each stage of venture investment by utilizing each of the services provided by MarkLines.

Corporate Data (as of April 2024)

Company Overview

Company Name	MarkLines Co., Ltd.
Established	January 4, 2001
Capital Stock	JPY 371,351,840
Number of Employees	245 (consolidated), 176 (non-consolidated)
Address	Sanno Park Tower 14F, 2-11-1 Nagata-cho, Chiyoda-ku, Tokyo 100-6114, Japan
Stock Exchange	Prime Market of the Tokyo Stock Exchange (Securities Code: 3901)

Executives

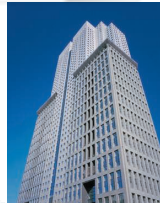
President & CEO	Makoto Sakai	Full-time Auditor	Toru Matsuo
Director	Kenichi Sakai	Outside Auditor	Junichi Hashiguchi
Director	Nana Kajiwara	Outside Auditor	Masami Shinozaki
Director	Hiroyuki Asada	(President, Shinozaki & Partners)	
Outside Director	Akihiko Shido		
(Chairman (CEO), Yorozu Corporation)			
Outside Director	Hiroshi Miyakawa		
(President/CEO, IID, Inc.)			

History

January	2001	MarkLines founded at Akasaka 3-chome, Minato-ku, Tokyo
August	2001	"Automotive Information Platform" (Japanese version) service launched
December	2001	"Automotive Information Platform" (English version) service launched
February	2003	MarkLines North America, Inc. established in Michigan, USA
September	2004	MarkLines (Shanghai) Co., Ltd. established in Shanghai, China
April	2007	Consulting business launched
December	2011	"Automotive Information Platform" (Chinese version) service launched
July	2013	MarkLines (Thailand) Co., Ltd. established in Bangkok, Thailand
December	2014	Listed on JASDAQ, Tokyo Stock Exchange
January	2015	MarkLines Europe GmbH established in Frankfurt, Germany
January	2016	MarkLines India Pvt. Ltd. established in Gurgaon, Haryana, India
April	2017	Formed a business partnership with engineering company Munro & Associates, Inc., USA
March	2018	Listed on the Second Section of the Tokyo Stock Exchange
June	2018	Listed on the First Section of the Tokyo Stock Exchange
November	2018	Opened Nagoya branch
April	2020	Established Automotive Fund Co., Ltd. in Chiyoda-ku, Tokyo
September	2020	Opened Benchmark Center in Atsugi City, Kanagawa Prefecture
January	2021	Celebrated 20th anniversary of founding
January	2021	Established Automotive Industry Support Fund 2021 Investment Limited Partnership
December	2022	MarkLines Mexicana S.A. de C.V. established in León, Guanajuato, Mexico

Group Outline

Japan



Headquarters

Sanno Park Tower 14F, 2-11-1 Nagata-cho, Chiyoda-ku, Tokyo 100-6114, Japan
TEL +81-3-4241-3902 (Sales Dept.)

New Benchmark Center

14-12 Morinosato Aoyama, Atsugi-shi, Kanagawa 243-0123, Japan

Automotive Fund Co., Ltd.

2-11-1 Nagata-cho, Chiyoda-ku, Tokyo 100-6114, Japan
TEL +81-3-4241-3913

Akasaka Office

Prudential Tower 4F, 2-13-10 Nagata-cho, Chiyoda-ku, Tokyo 100-0014, Japan
TEL +81-50-3662-9245

Nagoya Branch

1-20-25 Nishiki, Naka-ku, Nagoya-shi, Aichi 460-0003, Japan
TEL +81-52-218-3704

Germany

MarkLines Europe GmbH

Frankfurt am Main, Germany
TEL +49-69-904-3870-0



India

MarkLines India Pvt. Ltd.

Gurgaon, Haryana, India
TEL +91-124-4048779



Mexico

MarkLines Mexicana S.A. de C.V.

León, Guanajuato, Mexico
TEL +52-477-796-0560



USA

MarkLines North America, Inc.

Southfield, Michigan, USA
TEL +1-248-327-6987



Thailand

MarkLines (Thailand) Co., Ltd.

Bangkok, Thailand
TEL +66-2-665-2840



China

MarkLines (Shanghai) Co., Ltd.

No. 300 East Nanjing Rd., Huangpu District, Shanghai, China
TEL +86-21-6212-6562



We are addressing ESG issues to contribute to the realization of a sustainable society

E

Environment

- We are providing information on automotive life cycle assessment, as well as knowledge and human resources, with an eye to achieve a decarbonized society.
- We are promoting resource-savings through the Internet business.

S

Society

- We are contributing to achieving comfortable movement by providing information on autonomous driving.
- We are promoting diversity by hiring human resources irrespective of age, gender, academic qualifications, or nationality.

G

Governance

- As a company listed on the Prime Market of the Tokyo Stock Exchange, we are promoting the creation of a system that enables sound corporate management, such as by appointing independent Outside Directors to ensure management transparency.

MarkLines Co., Ltd.

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