

NEW CAR ASSESSMENT PROGRAM FOR SOUTHEAST ASIAN REGION (ASEAN NCAP)

ASEAN Outlook

ASEAN covers a land area of 4.43 million km², which is 3% of the total land area of earth. The ASEAN population is approximately 625 million people, which is 8.9% of the world's population. In 2013, its combined GDP had grown to more than US\$2.3 trillion. If ASEAN were a single entity, it would rank as the seventh largest economy in the world, behind the US, China, Japan, Germany, France and the United Kingdom.

ASEAN Automotive Outlook 2014

The 2004–2010 period of car market in ASEAN region was characterized by a fluctuating trend. In 2005 sales volume was about 1.9 million new vehicles, fallen under that goal during 2006–2007 and then passing 2.0 million units in 2008.

During the 2009 financial crisis, the ASEAN car industry recovers at 1.8 million. However, the recovery was very fast scoring a sales record in 2012 with 3.4 new registrations, up a strong 41.1% from the previous year. In 2013, the market hit its record with sales over 3.4 million. In the last year, the ASEAN market fell to 3.1 million units (-9.7% from the previous year) due to the collapse of the Thailand market while other markets were flat or increased.

In 2014, Indonesia was the largest market of the Region accounting for 36% of the whole ASEAN market. It followed by Thailand (28%), Malaysia (21%) and the Philippines (8%).

Vietnam and the Philippines are the most dynamic markets while Brunei, Indonesia, Malaysia are consider as mature markets. In 2014 Indonesia, Thailand and Malaysia ranked among top 25 largest markets in the global scenario, respectively in 14th, 18th, and 21st place.

ASEAN NCAP Overview

In line with the Vehicle Pillar of the United Nation's Decade of Action for Global Road Safety 2011–2020 and in vision to elevate motor vehicle safety standards in the region and encourage a market for safer vehicles, a new car assessment program for Southeast Asian countries (ASEAN NCAP) was established since December 2011. Malaysian Institute of Road Safety Research (MIROS) has initiated the ASEAN NCAP with the consistent and strong support by Global NCAP. The Automobile Association Clubs from various countries such as Malaysia, Singapore, the Philippines and Cambodia had joined as the steering committee of ASEAN NCAP. Recently, on 1st December 2014, the Royal Automobile Association of Thailand (RAAT) has joined ASEAN NCAP. Furthermore, ASEAN NCAP has been supported technically by Latin NCAP, Australian NCAP, and EuroNCAP. Japan NCAP and Korean NCAP have supported ASEAN NCAP in the area of providing and sharing test facility.

ASEAN NCAP Achievement

During the first phase of the program, seven popular car models were selected and tested according to European New Car Assessment Program (EuroNCAP) protocol on offset frontal crash test. Result for the first test has varied from 1 star to 5 stars cars.

Based upon the impact of the first phase, ASEAN NCAP created opportunity for the manufacturers to improve their vehicle safety level by participating in ASEAN NCAP voluntarily. Eleven brands and models had been tested during the second phase. Expectedly most of the cars scored 4 stars and above. Phase 2 has maintained the same protocol of Phase 1.

The Phases 3 and 3+ were executed after the completion of Phases 1 and 2. For Phase 3, it started with the crash of VW Polo Sedan in October 2013. Fifteen vehicles involved

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in this phase consist of two pick-ups, six sedans, six small cars and one SUV. Eleven car manufacturers were involved in these phases.

Summary of the achievements are as follows.

1. Nissan Teana recorded as the highest in ASEAN NCAP by scoring maximum 16/16 for frontal test. Its Child Occupant Protection (COP) also obtained 5 stars for the first time in history.
2. Perodua Axia, the small car from Malaysia managed to score 4 stars and is the most affordable 4 stars car for the region with the price of USD 8,000.
3. Meanwhile, Proton IRIZ with standard Electronic Stability Control (ESC) fitment is the most affordable 5 stars car for the region.
4. Six new manufacturers tested in ASEAN NCAP in Phases 3 and 3+ with Indian made vehicle, Tata Vista.
5. The first Left Hand Drive (LHD) vehicle tested in ASEAN NCAP is HONDA CRV, a production from Thailand made for the Philippines and Vietnam market.
6. KATRI, a new laboratory that is able to conduct ASEAN NCAP crash test was built; Chevrolet Colorado test was conducted in March 2014.
7. The lowest score in ASEAN NCAP, which is "0" star obtained by KIA Picanto that was bought from Thailand. The car was not equipped with any airbag.
8. The results launching of Phase 3 was concurrently held in Melbourne, Australia and Malacca, Malaysia. ASEAN NCAP also launched some results during the ASEAN NCAP Grand Prix 2014 and the final result of Nissan Teana launch during ASEAN Automobile Safety Forum 002 in Bangkok, Thailand. For note, Nissan Teana was the first vehicle model which recorded perfect score 16 out of 16 in the Adult Occupant Protection (AOP). Similarly, Nissan Teana breaking the record of Child Occupant Protection (COP) by scoring 5-star with 88% compliance.

ASEAN NCAP Future Plan

ASEAN NCAP had tested 70% of the top 30 cars (volume), according to 2012 sales volume statistics. On top of that, ASEAN NCAP had also tested 17 from Top 20 car

brand in ASEAN to date. From 34 cars that have been tested, 88% of the cars scored 4 stars and above. Hence, it is safe to mention that the passive safety level of cars in ASEAN have reached a satisfied level. The entire region has been covered except for China-made cars with plans for testing in March 2015. Most of these great achievements have been done within the 1000-day of its inception. Thus, for the next 1000 days, ASEAN NCAP believes that the crash needs to be stopped and prevented. Therefore, active safety technology will be prioritized. Autonomous Emergency Braking (AEB) Technology that claims to be “the next seatbelt” will be explored especially in the area of motorcycle crash prevention. Concurrently, ASEAN NCAP will gear up for ESC installation as a mandatory feature for 5 stars cars. It is our hope that the autonomous driving (without driver error) will realize the future 1000-day plan of ASEAN NCAP. The target date would be from year 2020 onwards.

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