



Australian Government

**Department of Industry
Tourism and Resources**

Key Automotive Statistics 2003

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◦ ACKNOWLEDGEMENTS ◦

In 2004, the Commonwealth Department of Industry, Tourism and Resources (DITR) undertook a survey of Australian motor vehicle manufacturers. This survey is conducted annually, and is used to collect data for the previous calendar year. Data collected for 2003 from the vehicle manufacturers is current as at July 2004.

The information contained in this publication is sourced from the survey returns and from other organisations that collect automotive industry data including:

- Federal Chamber of Automotive Industries (VFACTS service)
- Australian Bureau of Statistics
- Federation of Automotive Products Manufacturers
- AC Nielsen

Key Automotive Statistics is produced by the Automotive Research and Trade Section and is available on the internet at www.industry.gov.au/auto.

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◦ GLOSSARY ◦

AAIR	Australian Automotive Intelligence Report
ABS	Australian Bureau of Statistics
CBU	Completely Built Up (assembled vehicle)
C/C	Cab Chassis
CKD	Completely Knocked Down (unassembled vehicle)
CPI	Consumer Price Index
CV	Commercial Vehicle
DITR	Department of Industry, Tourism and Resources
FAPM	Federation of Automotive Products Manufacturers
FCAI	Federal Chamber of Automotive Industries
GDP	Gross Domestic Product
GVM	Gross Vehicle Mass
HCV	Heavy Commercial Vehicle
LCV	Light Commercial Vehicle
NAFTA	North American Free Trade Agreement (USA, Canada and Mexico)
PMV	Passenger motor Vehicle
PMV derivatives	LCV models based on PMV platforms
PU/CC	Pick Up / Cab Chassis
RBA	Reserve Bank of Australia
R&D	Research and Development
VFACTS	Vehicle retail sales statistics provided by the FCAI
YTD	Year to Date
4WD (& 4X4)	Four Wheel Drive

MOTOR VEHICLE CLASSIFICATIONS AND DEFINITIONS

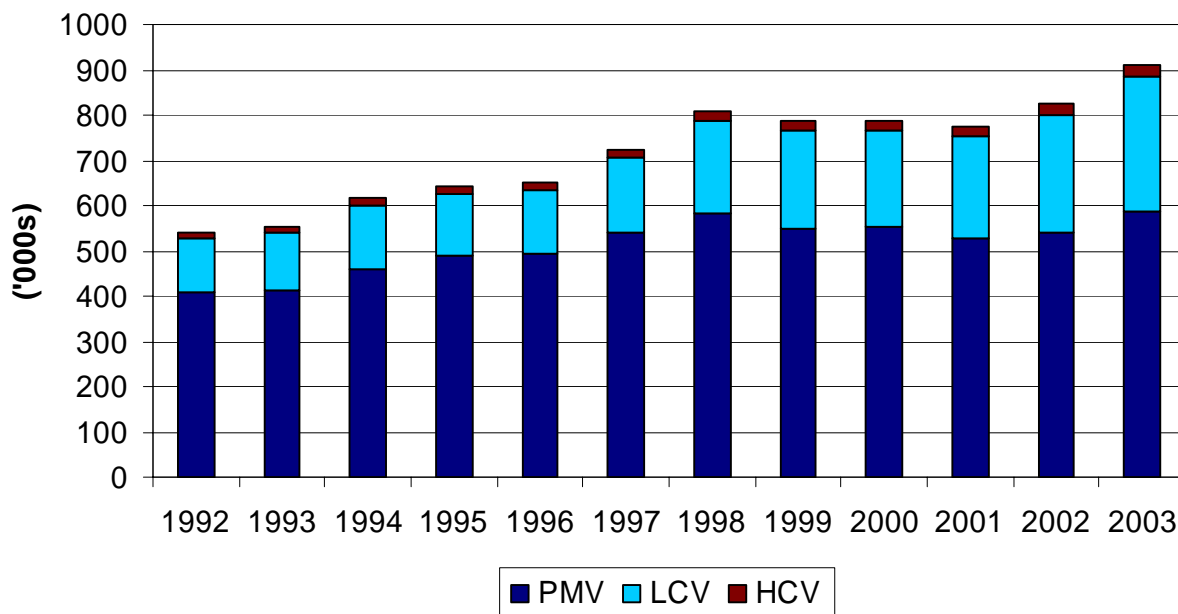
Passenger Motor Vehicles		Light Trucks		Heavy Trucks	
Light	Passenger car, hatch or sedan 3 or 4 cyl, up to 1400cc	Light Buses	8 seater plus, up to 3,500 kgs GVM	Trucks	3,501 – 7,500 kgs GVM
Small	Passenger car, hatch, sedan or wagon, 4 cyl, 1401cc upward	Vans	Blind and window vans	Trucks	7,501 – 15,000 kgs GVM
Medium	Passenger car, hatch, sedan or wagon, 4 cyl, 1901cc upward	All Terrain Wagon	Four wheel drive, high ground clearance, off road wagon	Trucks	15,001 kgs & Over GVM
Large	Passenger car, hatch, sedan or wagon, 6 cyl or 8 cyl	Pick-up / Chassis 4x2	Two driven wheels, normal control (bonnet), utility, cab chassis and crewcabs	Buses	3,501 – 7,500 kgs GVM
People Movers	Passenger usage (may incur commercial duty rates), seating capacity > 5 people	Pick-up / Chassis 4x4	Four driven wheels, normal control (bonnet), utility, cab chassis and crewcabs	Buses	7,501 kgs & Over GVM
Sports	Coupe or convertible, priced below the luxury tax threshold	Trucks 2.5-3.5 Tonne	Forward control cab, 2,500-3,500 kgs GVM		
Prestige	Highly specified passenger cars, hatch, sedan or wagon, priced below the luxury tax threshold				
Luxury	Highly specified passenger cars, coupe, convertible, hatch, sedan or wagon, priced above the luxury tax threshold				

Source: VFACTS indicative segment classifications

1. MOTOR VEHICLE SALES – AUSTRALIA

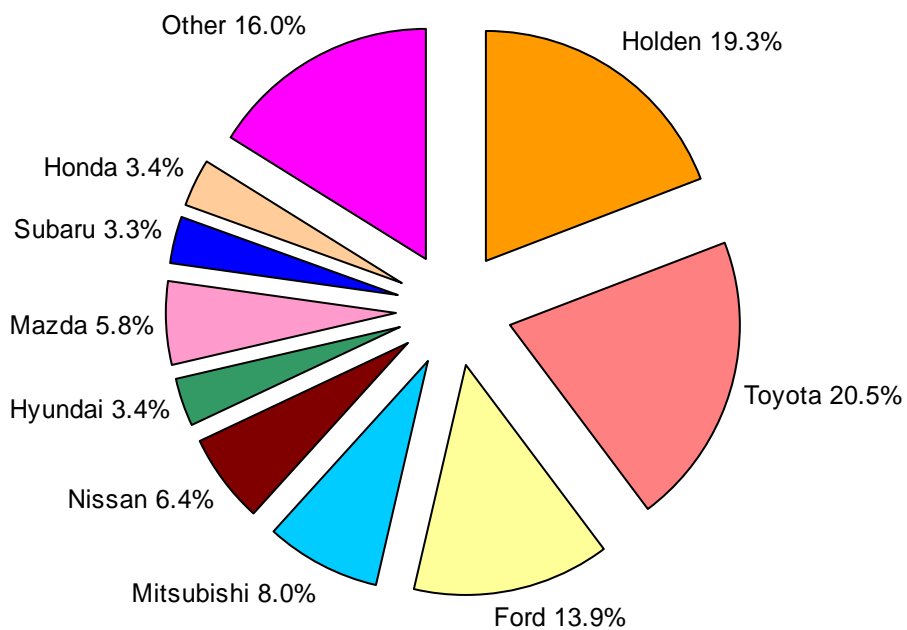
1.1 New Motor Vehicle Sales

Figure 1.1.1 New motor vehicle sales



Reference: Table 1

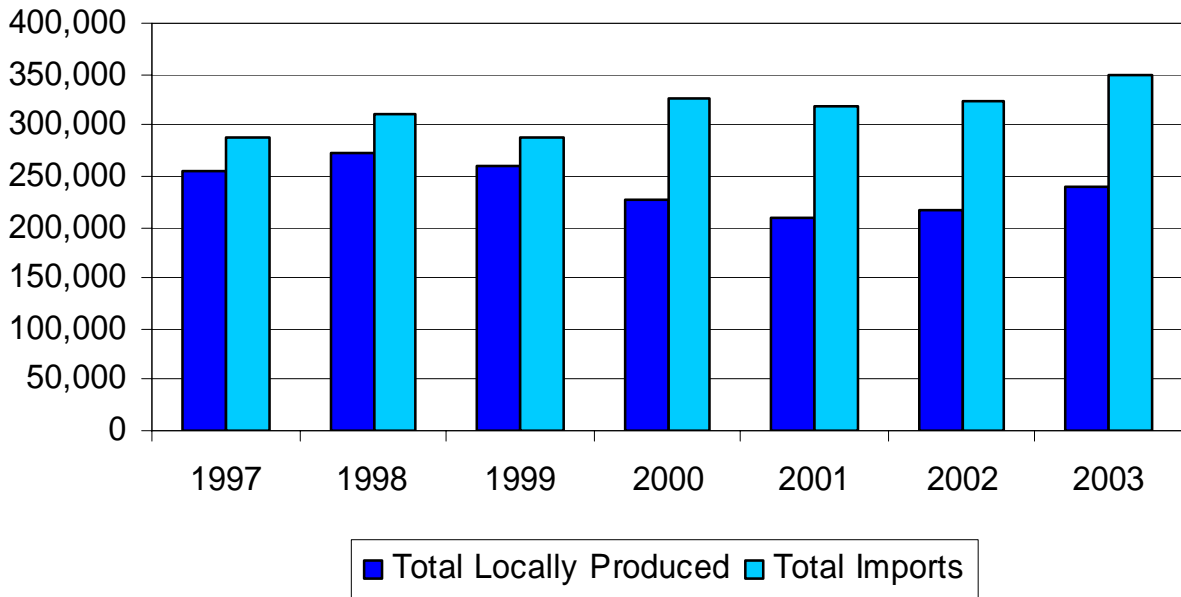
Figure 1.1.2 Total market shares by marque (2003)



Reference: Table 2

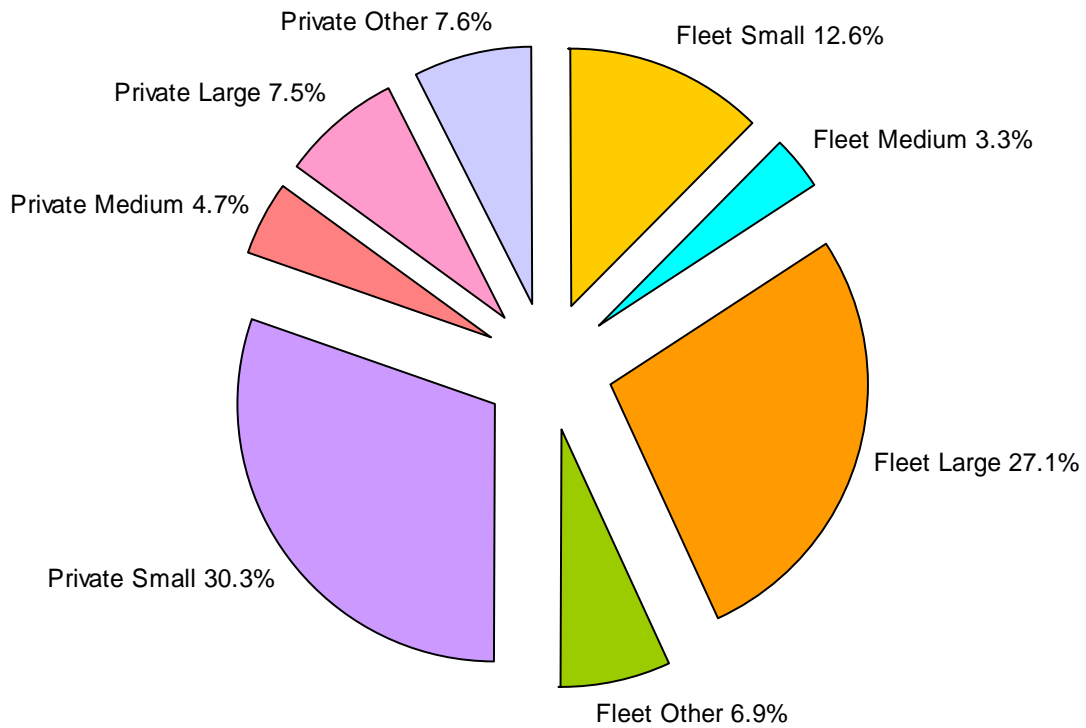
1.2 Passenger Motor Vehicle Sales

Figure 1.2.1 Locally produced and imported PMV sales



Reference: Table 4

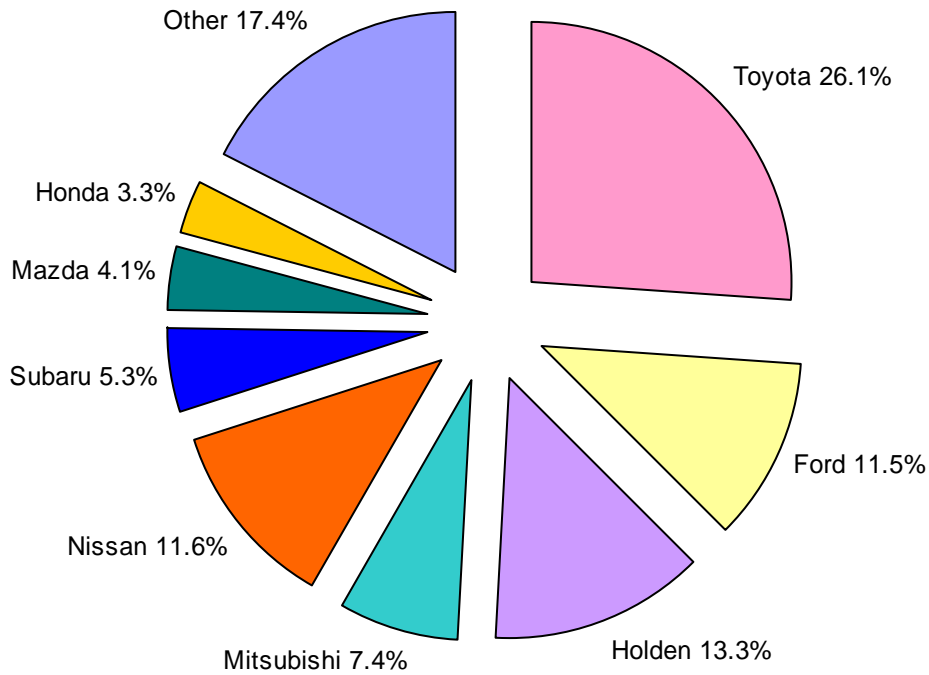
Figure 1.2.2 New PMV market shares by vehicle and purchaser types (2003)



Reference: Table 5

1.3 Truck (Commercial Vehicle) Sales

Figure 1.3.1 Truck market shares by marque (2003)

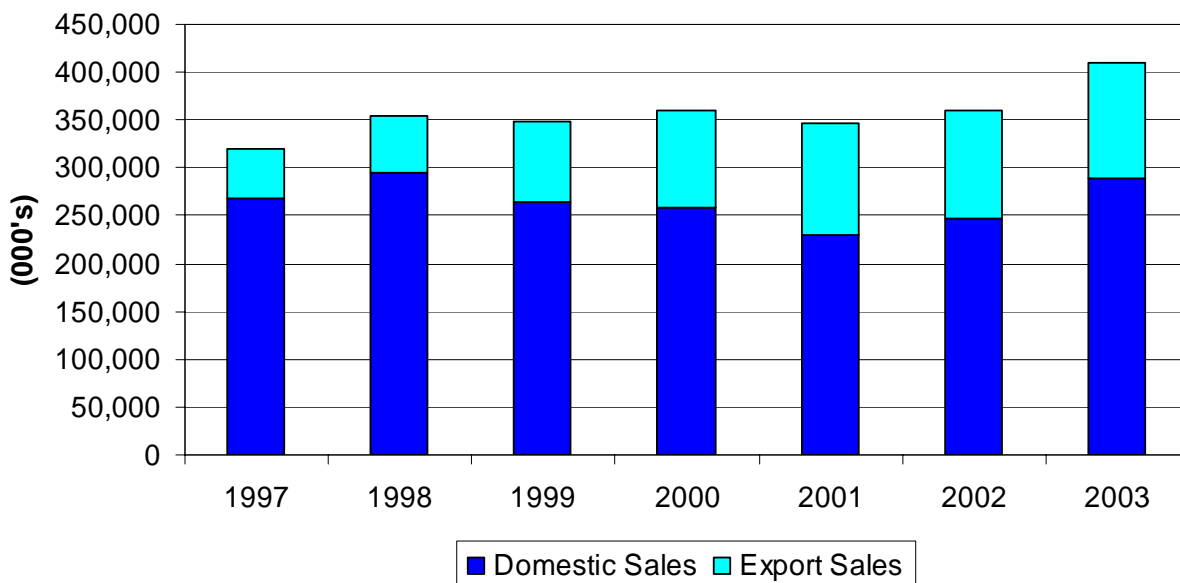


Reference: Table 6

2. MOTOR VEHICLE PRODUCTION – AUSTRALIA

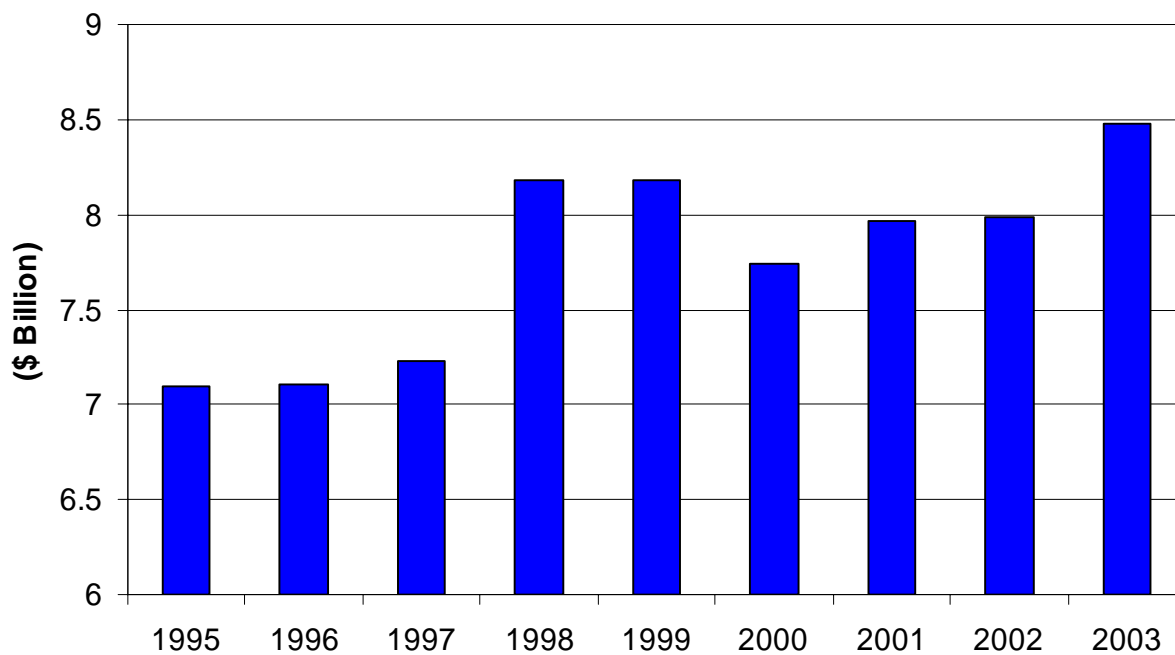
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Figure 2.1.1 Markets for locally produced PMVs and derivatives



Reference: Table 8

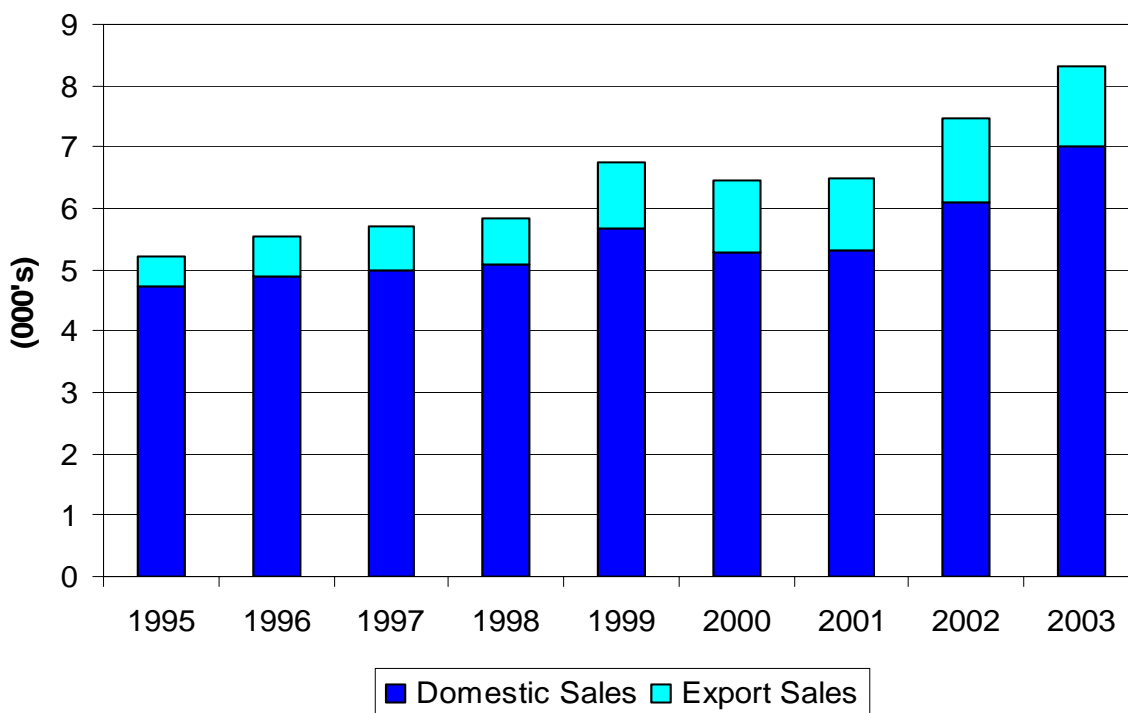
Figure 2.1.2 Domestic manufacturers' value of production of PMVs (and derivatives)



Reference: Table 9

2.2 Component Manufacturers

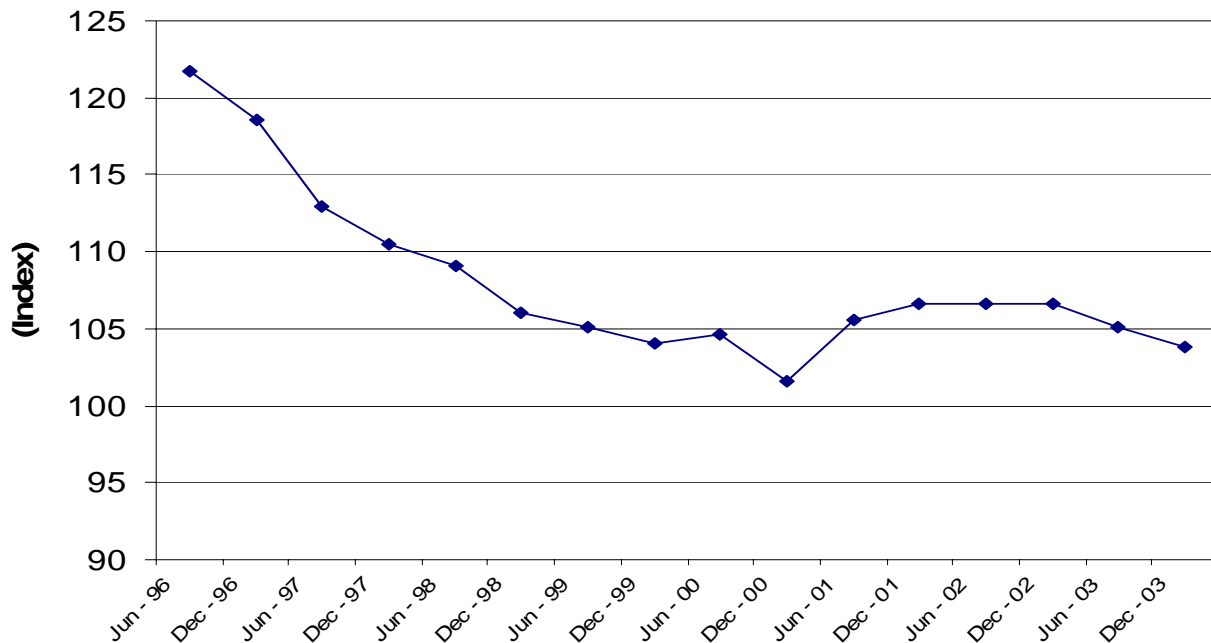
Figure 2.2.1 Sales of components by FAPM member companies



Reference: Table 11

3. PRICES

Figure 3.1.1 New motor vehicle price index

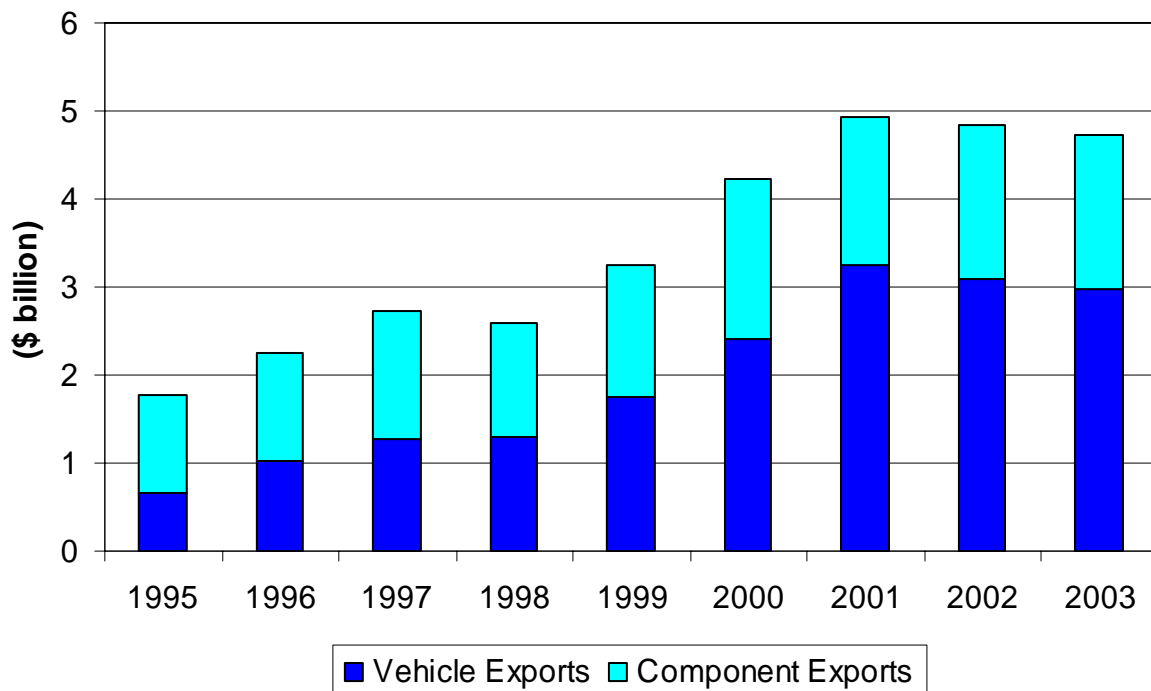


Reference: Table 12

4. TRADE

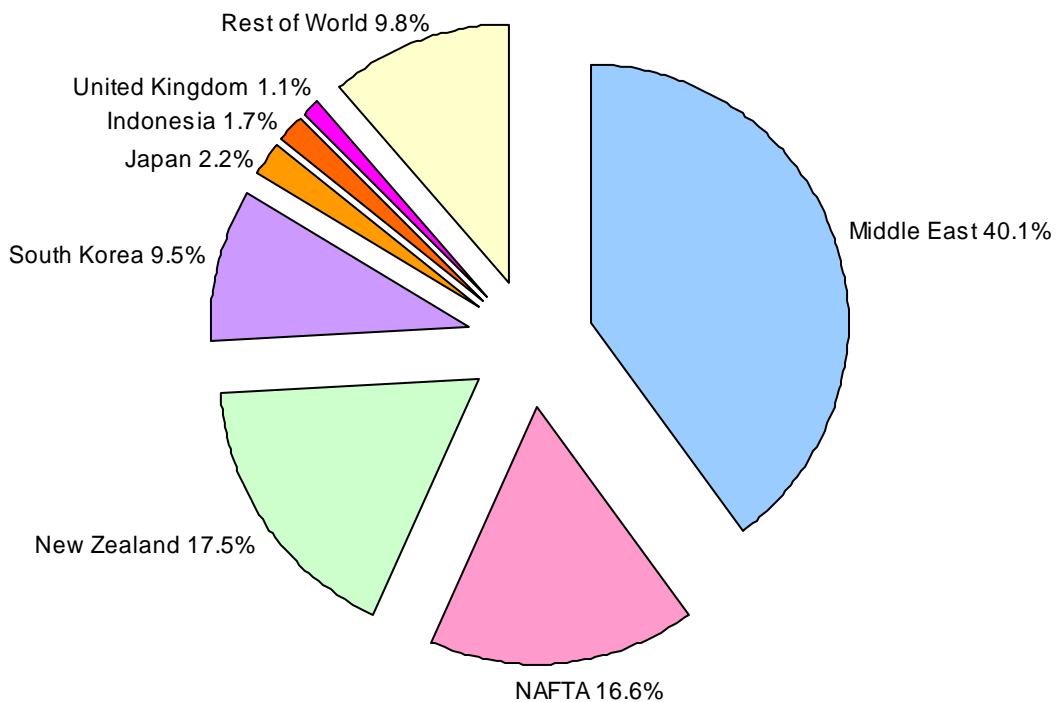
4.1 Exports

Figure 4.1.1 Value of automotive exports



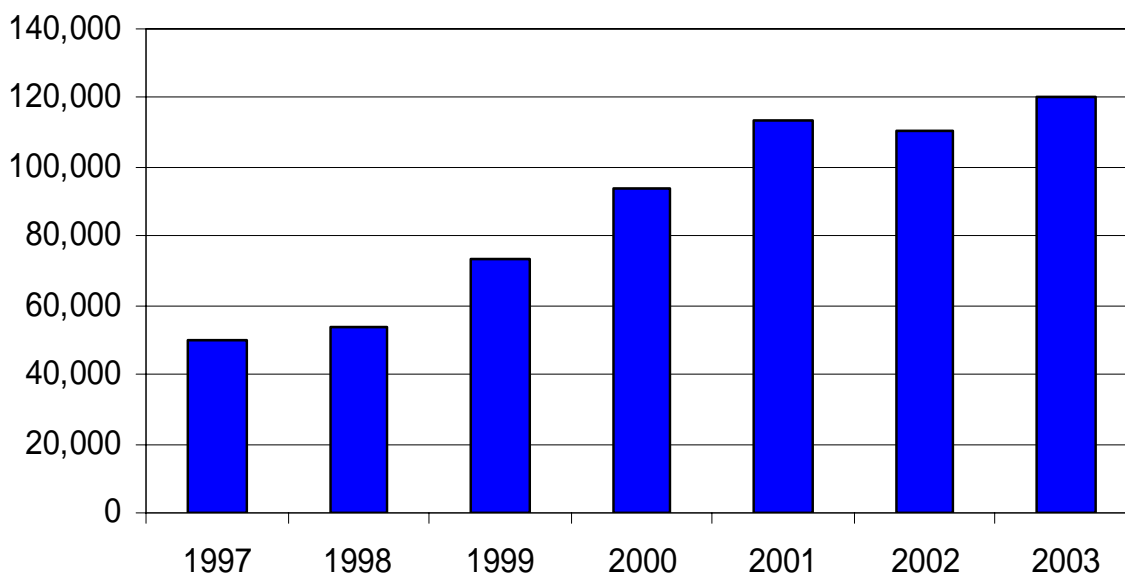
Reference: Table 14

Figure 4.1.2 Automotive exports (vehicles and components) by destination (2003)



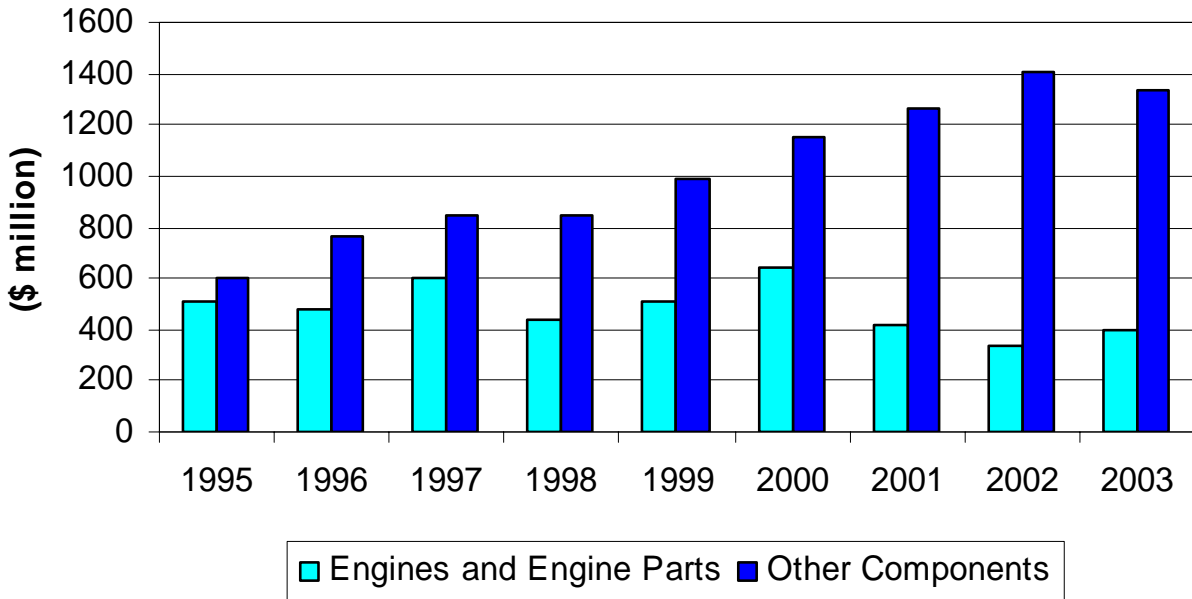
Reference: Table 15

Figure 4.1.3 Exports of CBU PMVs and derivatives



Reference: Table 16

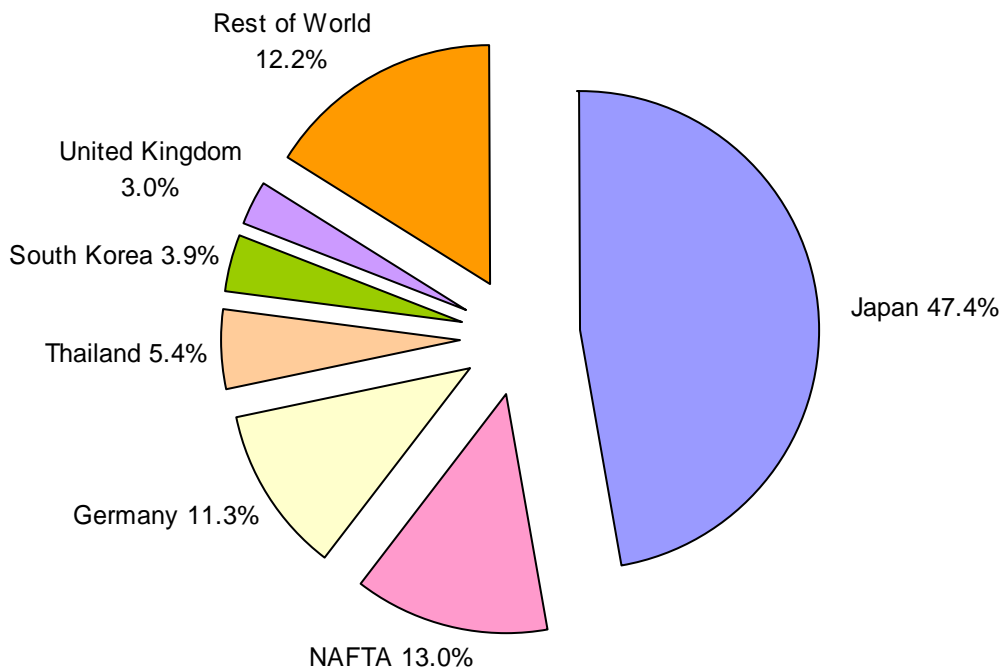
Figure 4.1.4 Exports of components



Reference: Table 17

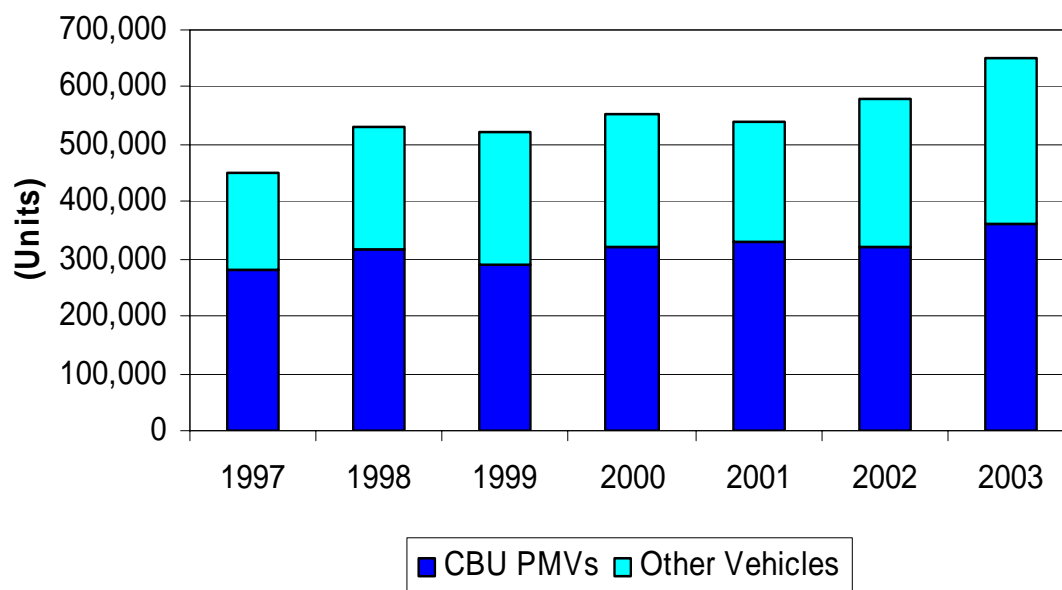
4.2 Imports

Figure 4.2.1 Automotive imports (vehicles and components) by source (2003)



Reference: Table 19

Figure 4.2.2 Imports of CBU PMVs and other motor vehicles

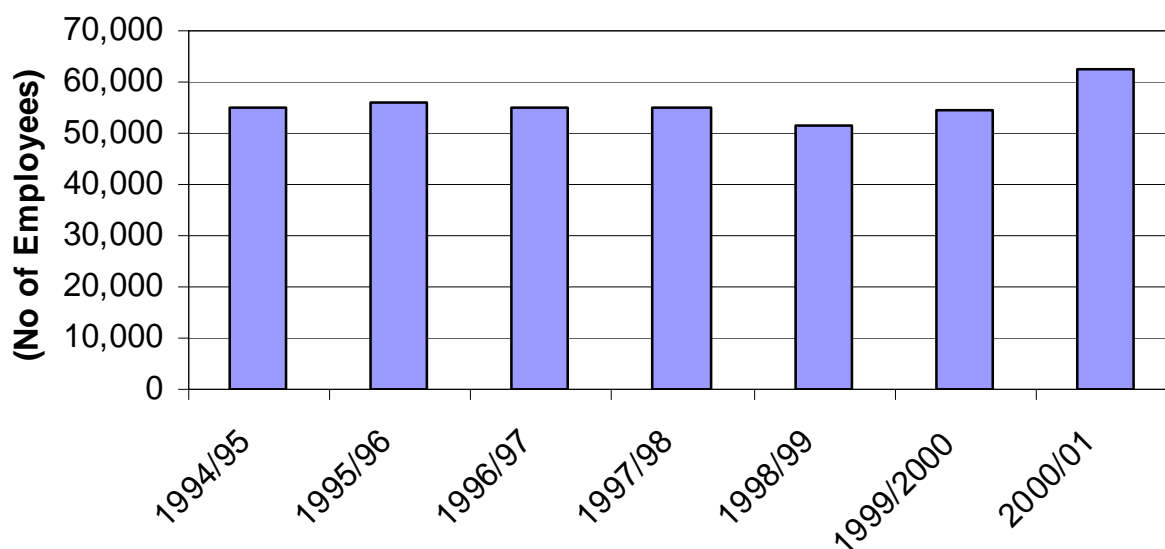


Reference: Table 20

5. EMPLOYMENT AND PRODUCTIVITY

5.1 Automotive Industry Employment

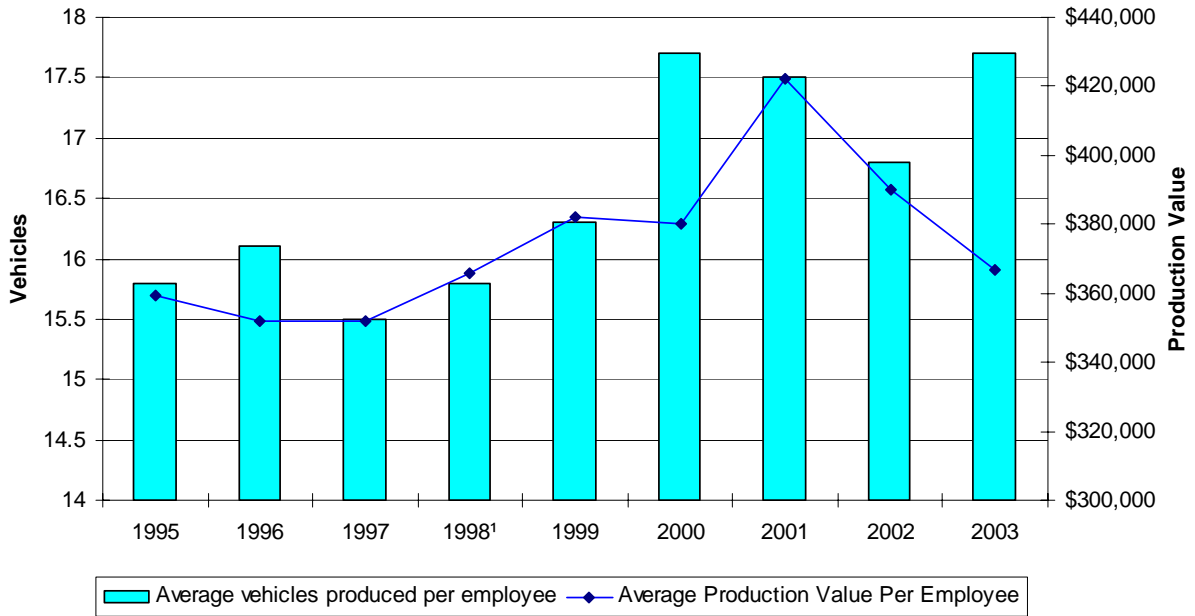
Figure 5.1.1 Automotive industry employment



Reference: Table 22

5.2 Productivity

Figure 5.2.1 Local vehicle manufacturers' labour productivity

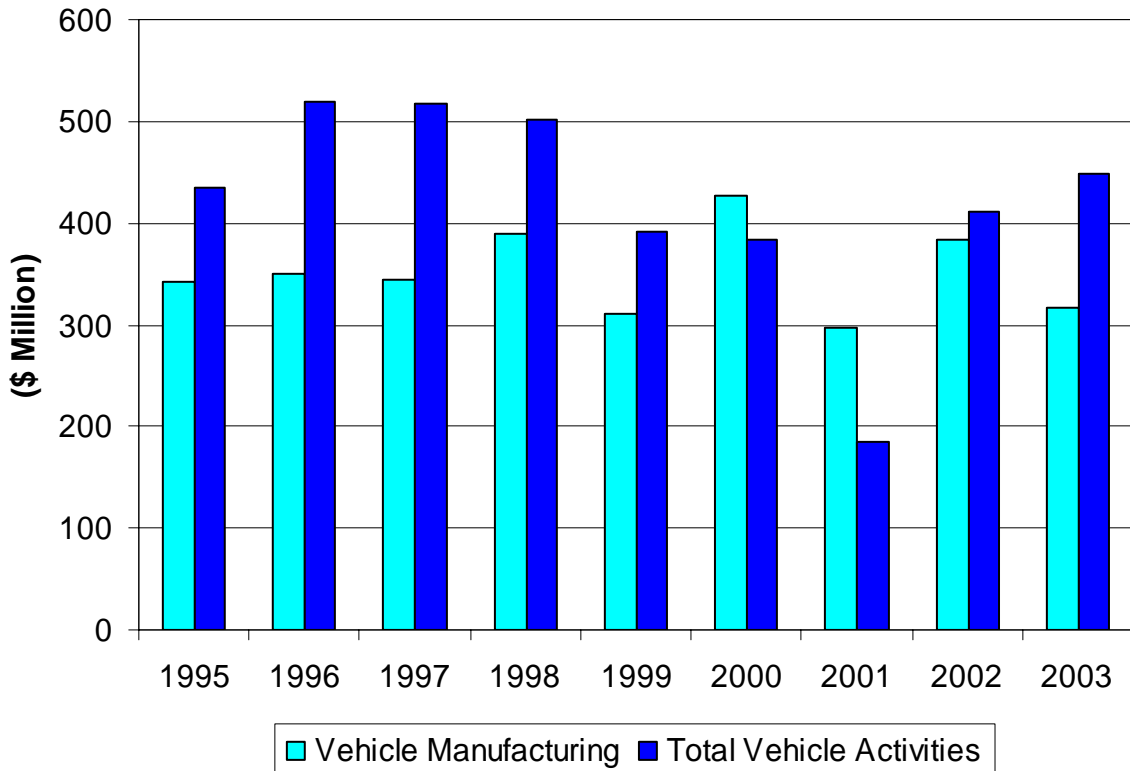


Reference: Table 23

6. PROFITABILITY AND R&D EXPENDITURE

6.1 PMV Manufacturing Profitability

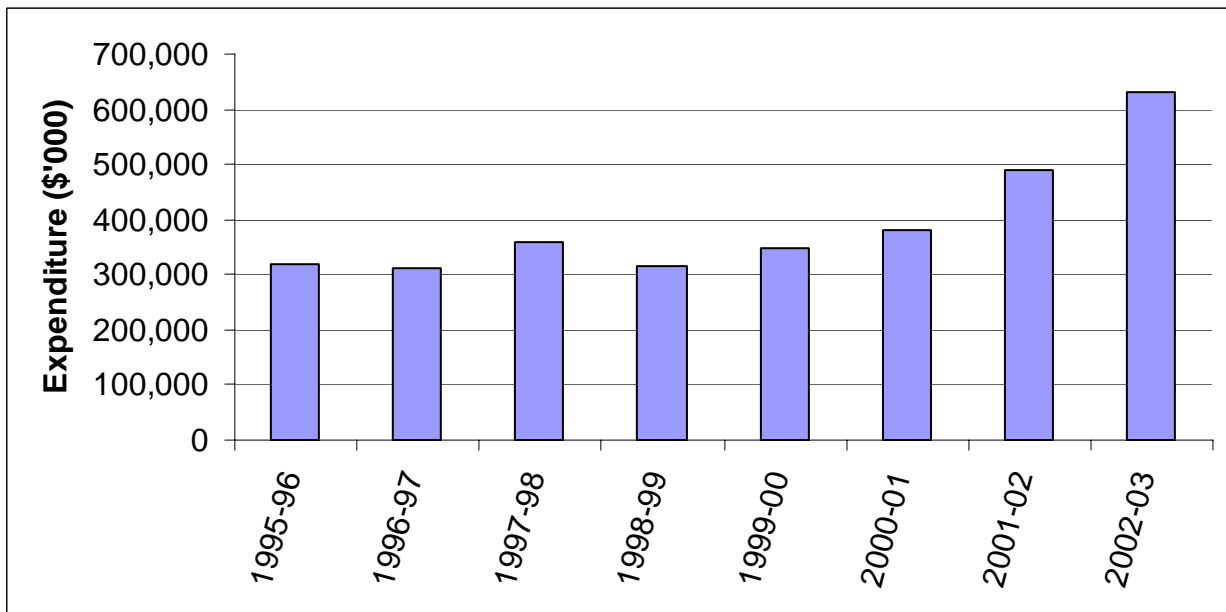
Figure 6.1.1 Local vehicle manufacturers' profit performance



Reference: Table 24

6.2 R&D Expenditure

Figure 6.2.1 Automotive industry R&D expenditure



Reference: Table 25

1. Motor vehicle sales – Australia

Table 1: New motor vehicle sales

	Passenger		Light Trucks		Heavy Trucks		Total	
	Units	(%)	Units	(%)	Units	(%)	Units	(%)
1992	406,427	75.0	121,089	22.3	14,561	2.7	542,077	100.0
1993	414,425	74.6	125,978	22.7	14,903	2.7	555,306	100.0
1994	460,698	74.8	137,252	22.3	18,336	3.0	616,286	100.0
1995	488,372	76.0	136,449	21.2	17,736	2.8	642,557	100.0
1996	492,058	75.7	142,830	22.0	15,161	2.3	650,049	100.0
1997	540,353	74.8	165,711	22.9	16,578	2.3	722,642	100.0
1998	584,360	72.4	203,941	25.3	19,368	2.4	807,669	100.0
1999	547,575	69.6	218,848	27.8	20,422	2.6	786,845	100.0
2000	553,673	70.3	213,571	27.1	19,856	2.5	787,100	100.0
2001	529,452	68.5	224,270	29.0	18,959	2.5	772,681	100.0
2002	540,240	65.5	260,457	31.6	23,612	2.9	824,309	100.0
2003	588,511	64.6	297,167	32.7	24,133	2.7	909,811	100.0

Source: VFACTS, Vehicle Retail Sales

Table 2: Total market shares by marque

Market Shares (%)												
	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003
Holden	17.4	17.4	18.8	19.2	19.2	16.6	19.0	19.7	19.7	21.4	21.6	19.3
Toyota	20.1	21.9	20.6	18.8	18.6	17.4	19.6	19.5	20.2	18.3	19.2	20.5
Ford	19.9	20.9	20.3	21.5	20.3	18	15.9	16.1	14.5	13.8	13.2	13.9
Mitsubishi	12.8	13.7	12.2	10.1	9.4	11.4	10.4	8.9	9.3	8.8	8.2	8.0
Nissan	7.0	4.7	4.1	3.7	3.9	4.5	5.7	6.2	5.8	5.6	6.1	6.4
Hyundai	2.3	3.0	4.0	5.4	7.5	8.3	7.1	6.0	5.8	5.2	4.1	3.4
Mazda	2.3	2.3	5.0	4.4	4.1	4.3	3.4	3.4	3.5	4.4	4.7	5.8
Subaru	2.7	1.8	1.4	1.2	1.3	2.0	2.5	3.2	3.4	3.5	3.4	3.3
Honda	5.7	4.6	2.6	2.2	2.5	2.4	3.2	3.6	3.8	2.7	2.9	3.4
Other	9.7	9.6	11.1	13.4	13.1	15.1	13.2	13.4	14.0	16.0	16.6	16.0
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Source: VFACTS, Vehicle Retail Sales

Table 3: Sales volumes and market shares by segment

Model Line	1997	Market share (%)	1998	Market share (%)	1999	Market share (%)	2000	Market share (%)	2001	Market share (%)	2002	Market share (%)	2003	Market share (%)
Passenger														
Light	54,914	7.6	61,373	7.6	44,875	5.7	89,977	11.4	66,942	8.7	66,235	8.0	76,716	8.4
Small	173,264	24.0	190,016	23.5	184,844	23.5	154,050	19.6	162,046	21.0	164,943	20.0	175,651	19.4
Medium	49,139	6.8	51,241	6.3	45,266	5.8	40,628	5.2	37,387	5.0	38,951	4.7	47,164	5.2
Large	199,294	27.6	217,364	26.9	208,123	26.5	198,766	25.3	190,303	24.6	188,348	22.8	203,524	22.3
People Movers	6,702	0.9	7,163	0.9	7,559	1.0	11,736	1.5	12,140	1.6	12,791	1.6	11,852	1.3
Sports	11,665	1.6	9,316	1.2	7,860	1.0	9,544	1.2	8,820	1.1	13,988	1.7	10,175	1.1
Prestige	27,772	3.8	27,351	3.4	28,903	3.7	29,590	3.8	22,773	3.5	24,830	3.0	29,167	3.2
Luxury	17,603	2.4	20,536	2.5	20,145	2.6	19,382	2.5	29,041	3.1	30,154	3.7	34,262	3.8
Total Passenger	540,353	74.8	584,360	72.4	547,575	69.6	553,673	70.3	529,452	68.5	540,240	65.5	588,551	64.7
Light Trucks														
Light Buses	1,324	0.2	1,620	0.2	1,467	0.2	1,619	0.2	1,277	0.2	1,615	0.2	1,787	0.1
Vans	18,991	2.6	20,448	2.5	21,322	2.7	19,006	2.4	16,870	2.2	18,270	2.2	21,598	2.4
All Terrain Wagons	71,268	9.9	96,551	12.0	104,058	13.2	105,510	13.4	116,236	15.0	138,064	16.7	150,578	16.6
PU/CC 4X2	38,281	5.3	43,132	5.3	48,601	6.2	47,276	6.0	53,817	7.0	59,516	7.2	70,966	7.8
PU/CC 4X4	34,718	4.8	40,761	5.0	42,567	5.4	39,533	5.0	35,371	4.6	42,039	5.1	50,670	5.6
Trucks 2,500-3,500 kgs GVM	1,129	0.2	1,429	0.2	833	0.1	627	0.1	699	0.1	953	0.1	1568	0.1
Total Light Trucks	165,711	22.9	203,941	25.3	218,848	27.8	213,571	27.1	224,270	29.0	260,457	31.6	297,167	32.6
Heavy Trucks														
Trucks 3,501-7,500 kgs GVM	5,338	0.7	6,606	0.8	7,565	1.0	7,705	1.0	7,598	1.0	10,569	1.3	8,480	1.0
Trucks 7,501-15,000 kgs GVM	4,358	0.6	5,079	0.6	5,382	0.7	5,163	0.7	3,892	0.6	4,365	0.5	4,837	0.5
Trucks 15,001+ kgs GVM	5,624	0.8	6,426	0.8	6,414	0.8	5,863	0.7	6,723	0.8	8,063	1.0	10,227	1.1
Bus 3,501-7,500 kgs GVM	768	0.1	785	0.1	823	0.1	1,045	0.1	712	0.1	606	0.1	583	0.1
Bus 7,501+ kgs GVM	489	0.1	472	0.1	238	0.0	80	0.0	34	0.0	9	0.0	6	0.0
Total Heavy Trucks	16,577	2.0	19,368	2.0	20,422	3.0	19,856	3.0	18,959	3.0	23,612	2.9	24,133	2.7
TOTAL VEHICLES	722,641	100.0	807,669	100.0	786,845	100.0	787,100	100.0	772,681	100.0	824,309	100.0	909,811	100.0

Source: VFACTS, Vehicle Retail Sales

Table 4: Sales volumes and segment shares of locally produced and imported PMVs by segment

Model Line	1997	Share (%)	1998	Share (%)	1999	Share (%)	2000	Share (%)	2001	Share (%)	2002	Share (%)	2003	Share (%)
Light and small segments														
Corolla ¹	22,348	9.8	21,889	8.7	28,387	12.4	30,576	12.5	30,813	13.5	34,948	15.1	36,128	14.3
Excel/Accent/Getz	38,489	16.9	44,018	17.5	32,486	14.1	29,675	12.2	21,055	9.2	15,109	6.5	15,228	6.0
Lancer/Mirage	21,669	9.5	26,715	10.6	19,676	8.6	25,283	10.4	22,331	9.8	22,279	9.6	24,592	8.5
Laser/323	19,262	8.4	19,450	7.7	19,546	8.5	22,286	9.1	26,186	11.4	29,124	12.6	21,362	9.7
Pulsar	14,114	6.2	19,835	7.9	22,591	9.8	21,740	8.9	20,672	9.0	16,258	7.0	18,972	7.5
Other	112,296	49.2	119,482	47.5	107,033	46.6	114,467	46.9	107,931	47.1	113,460	49.1	136,085	54.0
<i>Total Locally Produced</i>	22,348	9.8	21,889	8.7	16,870	7.3	0	0.0	0	0.0	0	0.0	0	0.0
<i>Total Imports</i>	205,830	90.0	229,500	91.0	212,849	93.0	244,027	100.0	228,988	100.0	231,178	100.0	252,367	100.0
Total Light/Small	228,178	100.0	251,389	100.0	229,719	100.0	244,027	100.0	228,988	100.0	231,178	100.0	252,367	100.0
Medium segment														
Camry 4 (inc Apollo 4)	19,782	40.3	23,387	45.6	21,243	46.9	19,644	48.4	18,256	47.7	20,536	52.7	25,261	53.6
Magna 4	5,916	12.0	3,099	6.0	307	0.7	0	0.0	0	0.0	0	0.0	0	0.0
Liberty	4,353	8.9	4,568	8.9	5,896	13.0	6,113	15.0	5,788	15.1	5,640	14.5	5,011	10.6
Ford Telstar/Mazda 626/Mazda 6	3,260	6.6	4,868	9.5	3,122	6.9	3,973	9.8	3,647	9.5	2,536	6.5	12,708	16.9
Vectra 4 ²	-	-	6,930	13.5	8,188	18.1	6,852	16.9	5,431	14.2	3,371	8.7	1,423	3.0
Other	15,828	32.2	15,319	29.9	14,698	32.5	10,898	26.8	5,171	13.5	6,868	17.6	2,761	15.9
<i>Total Locally Produced</i>	25,698	52.3	28,861	56.3	29,349	64.8	25,132	62.0	18,256	48.0	20,536	53.0	25,261	53.6
<i>Total Imports</i>	23,441	48.0	22,380	44.0	15,917	35.0	15,496	38.0	20,037	52.0	18,415	47.0	21,903	46.4
Total Medium	49,139	100.0	51,241	100.0	45,266	100.0	40,628	100.0	38,293	100.0	38,951	100.0	47,164	100.0
Large segment														
Avalon	-	-	-	-	-	-	8,759	4.4	11,760	6.2	8,588	4.6	6,064	3.0
Camry 6/Vienta (inc Apollo 6)	11,786	5.9	18,694	8.6	21,281	10.2	13,690	6.9	8,470	4.5	10,416	5.5	13,279	6.5
Commodore (inc Lexcen)	77,989	39.1	94,647	43.5	85,648	41.2	83,610	42.1	85,246	44.8	88,478	47.0	86,553	42.5
Falcon	71,850	36.1	68,758	31.6	70,084	33.7	60,460	30.4	53,534	28.2	54,629	29	73,220	36.0
Magna 6/Verada	35,092	17.6	32,745	15.1	27,932	13.4	26,271	13.2	24,381	12.8	23,405	12.4	23,666	11.6
Other	2,577	1.3	2,520	1.2	3,178	1.5	5,976	3.0	6,736	3.5	2,832	1.5	742	0.4
<i>Total Locally Produced</i>	196,717	98.7	214,844	98.8	204,945	98.5	192,790	97.0	183,391	96.0	185,516	98.0	202,782	99.6
<i>Total Imports</i>	2,577	1.0	2,520	1.0	3,178	2.0	5,976	3.0	6,736	4.0	2,832	2.0	742	0.4
Total Large	199,294	100.0	217,364	100.0	208,123	100.0	198,766	100.0	190,127	100.0	188,348	100.0	203,524	100.0

Table 4: Sales volumes and segment shares of locally produced and imported PMVs by segment (cont'd)

Model Line	1997	Share (%)	1998	Share (%)	1999	Share (%)	2000	Share (%)	2001	Share (%)	2002	Share (%)	2003	Share (%)
Other segments³														
Fairlane/LTD	4,519	7.1	3,427	5.3	4,807	7.5	3,076	4.4	2,455	3.4	2,101	2.6	2,535	3.0
Statesman/Caprice	4,387	6.9	4,340	6.7	4,909	7.6	6,370	9.1	5,518	7.7	4,958	6.1	5,424	6.3
Monaro ⁴	0	0.0	0	0.0	0	0.0	0	0.0	176	0.2	4,274	5.2	2,889	3.4
BMW 3 Series	2,565	4.0	3,317	5.2	6,588	10.2	7,730	11.0	4,916	6.8	7,455	9.1	7,559	8.8
Accord	3,482	5.5	5,165	8.0	3,619	5.6	2,765	3.9	1,880	2.6	1,095	1.3	6,204	7.3
Other	48,789	76.5	48,117	74.8	44,544	69.1	50,311	71.6	57,099	79.3	61,880	75.7	60,845	71.2
<i>Total Locally Produced</i>	<i>8,906</i>	<i>14.0</i>	<i>7,767</i>	<i>12.1</i>	<i>9,716</i>	<i>15.1</i>	<i>9,446</i>	<i>13.0</i>	<i>8,149</i>	<i>11.0</i>	<i>11,333</i>	<i>14.0</i>	<i>10,848</i>	<i>12.7</i>
<i>Total Imports</i>	<i>54,836</i>	<i>86.0</i>	<i>56,599</i>	<i>88.0</i>	<i>54,751</i>	<i>85.0</i>	<i>60,806</i>	<i>87.0</i>	<i>63,895</i>	<i>89.0</i>	<i>70,430</i>	<i>86.0</i>	<i>74,608</i>	<i>87.3</i>
Total Other	63,742	100.0	64,366	100.0	64,467	100.0	70,252	100.0	72,044	100.0	81,763	100.0	85,456	100.0
Total PMVs														
Total Locally Produced	253,669	46.9	273,361	46.8	260,880	47.6	227,368	41.1	209,796	39.6	217,385	40.2	238,891	40.6
Total Imports	286,684	53.1	310,999	53.2	286,695	52.4	326,305	58.9	319,656	60.4	322,855	59.8	349,620	59.4
Total	540,353	100.0	584,360	100.0	547,572	100.0	553,673	100.0	529,452	100.0	540,240	100.0	588,511	100.0

¹ Toyota Corolla ceased local production in 1999 when 11,517 vehicles were produced in Australia

² Holden Vectra commenced local production in 1998 when 2,375 locally produced Vectras were sold in Australia. There were 7,799 locally produced Vectras sold in Australia in 1999 and 5,488 locally produced Vectras sold in Australia in 2000, the final year of local production

³ Other segments comprise people movers, sports, prestige and luxury vehicles

⁴ Holden Monaro commenced local production in 2001

Source: VFACTS, Vehicle Retail Sales

Table 5: New PMV sales volumes and market shares by vehicle and purchaser type

	1997	Share (%)	1998	Share (%)	1999	Share (%)	2000	Share (%)	2001	Share (%)	2002	Share (%)	2003	Share (%)
Fleet PMV Sales ¹														
Small segment ²	48,503	9.0	50,981	8.7	49,469	9.0	53,609	9.7	64,978	9.7	76,174	14.1	74,234	12.6
Medium segment	23,793	4.4	26,132	4.5	24,080	4.4	20,041	3.6	17,606	3.6	14,531	2.7	19,547	3.3
Large segment	157,567	29.2	172,798	29.6	163,958	29.9	150,769	27.2	144,924	27.2	144,099	26.7	159,346	27.1
Other ³	29,535	5.5	29,824	5.1	30,599	5.6	30,632	5.5	34,236	5.5	39,277	7.3	40,531	6.9
Total Fleet PMV Sales	259,398	48.0	279,735	47.9	268,106	49.0	255,051	46.1	261,744	46.1	274,081	50.7	293,658	49.9
Private PMV Sales														
Small segment ²	179,686	33.3	200,408	34.3	180,250	32.9	190,418	34.4	164,010	34.4	155,004	28.7	178,133	30.3
Medium segment	25,346	4.7	25,109	4.3	21,186	3.9	20,587	3.7	20,687	3.7	24,420	4.5	27,617	4.7
Large segment	41,727	7.7	44,566	7.6	44,165	8.1	47,997	8.7	45,379	8.7	44,249	8.2	44,178	7.5
Other ³	34,186	6.3	34,533	5.9	33,868	6.2	39,620	7.2	37,632	7.2	42,486	7.9	44,925	7.6
Total Private PMV Sales	280,945	52.0	304,616	52.1	279,469	51.0	298,622	53.9	267,708	53.9	266,159	49.3	294,853	50.1

¹ Fleet sales include sales to private businesses and government

² Small segment includes light and small vehicles

³ Other group comprises people movers, sports, prestige and luxury vehicles

Source: VFACTS, Vehicle Retail Sales

Table 6: Truck (commercial vehicle) sales volumes and market shares by marque

	2001		2002		2003	
	Volume	Share (%)	Volume	Share (%)	Volume	Share (%)
Toyota	60,093	24.7	69,262	24.4	83,765	26.1
Ford	31,999	13.2	35,976	12.7	37,103	11.5
Holden	30,240	12.4	35,873	12.6	42,852	13.3
Mitsubishi	20,239	8.3	21,019	7.4	23,887	7.4
Nissan	18,911	7.8	31,818	11.2	37,364	11.6
Subaru	14,669	6.0	15,583	5.5	17,167	5.3
Mazda	13,538	5.6	13,145	4.6	13,085	4.1
Honda	9,357	3.8	12,497	4.4	10,685	3.3
Other	44,183	18.2	48,896	17.2	55,392	17.4
TOTAL	243,229	100.0	284,069	100.0	321,300	100.0

Source: VFACTS, Vehicle Retail Sales

Table 7: Truck sales volumes and segment shares by model

Model Line	1997	(%)	1998	(%)	1999	(%)	2000	(%)	2001	(%)	2002	(%)	2003	(%)
Light Trucks														
Ford Falcon Van *	1,004	0.6	864	0.4	383	0.2	0	0.0	0	0.0	0	0.0	0	0.0
Ford Falcon Ute #	7,311	4.4	6,769	3.3	10,493	4.8	13,698	6.4	16,955	7.6	17,883	6.9	20,212	6.8
Holden Ute #	8,283	5.0	8,532	4.2	8,342	3.8	6,361	3.0	11,173	5.0	13,791	5.3	17,211	5.8
Other	149,113	90.0	187,776	92.1	199,630	91.2	193,512	90.6	196,142	87.5	228,783	87.8	259,744	87.4
Total Light Trucks	165,711	100.0	203,941	100.0	218,848	100.0	213,571	100.0	224,270	100.0	260,457	100.0	297,167	100.0
Heavy Trucks														
3.501 - 7.5 Tonnes														
Ford Trader *	545	10.3	402	6.1	39	0.5	5	0.1	0	0.0	0	0.0	0	0.0
Mitsubishi Canter * ¹	1,257	23.8	1,540	23.3	1,780	23.5	1,728	22.4	1,322	17.4	1,278	12.1	1,391	16.4
Other	3,474	65.8	4,664	70.6	5,746	76.0	5,972	77.5	6,276	82.6	9,291	87.9	7,089	83.6
3.501 - 7.5 Tonnes Total	5,276	100.0	6,606	100.0	7,565	100.0	7,705	100.0	7,598	100.0	10,569	100.0	8,480	100.0
7.501 - 15 Tonnes														
Isuzu *	1,499	34.3	1,746	30.3	2,149	39.9	2,139	41.4	1,670	42.9	1,809	41.4	1,881	38.9
Hino *	1,266	29.0	1,540	16.2	1,630	30.3	1,687	32.7	1,187	30.5	1,336	30.6	1,725	35.7
Mitsubishi * ²	768	17.6	824	16.2	774	14.4	650	12.6	447	11.5	422	9.7	474	9.8
Other	832	19.1	972	19.1	829	15.4	687	13.3	588	15.1	798	18.3	757	15.6
7.501 - 15 Tonnes Total	4,365	100.0	5,082	100.0	5,382	100.0	5,163	100.0	3,892	100.0	4,365	100.0	4,837	100.0
Over 15 Tonnes														
International #	999	17.8	1,115	17.4	1,056	16.5	737	12.6	12	0.2	35	0.4	13	0.1
Kenworth #	1,037	18.5	1,145	17.8	1,045	16.3	890	15.2	678	10.1	1,319	16.4	1,658	16.2
Mack #	664	11.8	703	10.9	735	11.5	787	13.4	715	10.6	697	8.6	909	8.9
Volvo #	578	10.3	670	10.4	774	12.1	587	10.0	942	14.0	858	10.6	1144	11.2
Ford Louisville *	589	10.5	556	8.7	100.0	1.6	8	0.1	2	0.0	0	0.0	0	0.0
Mitsubishi * ³	161	2.9	124	1.9	227	3.5	222	3.8	145	2.2	148	1.8	473	4.6
Mercedes *	58	1.0	45	0.7	77	1.2	72	1.2	175	2.6	279	3.5	426	4.2
Other	1,694	30.1	2,189	34.1	2,627	41.0	2,782	47.5	4,054	60.0	4,727	59.0	5,604	54.8
Total Over 15 Tonnes	5,619	100.0	6,423	100.0	6,414	100.0	5,863	100.0	6,723	100.0	8,063	100.0	10,227	100.0

Table 7: Truck sales volumes and segment shares by model (cont'd)

Model Line	1997	(%)	1998	(%)	1999	(%)	2000	(%)	2001	(%)	2002	(%)	2003	(%)
Buses														
Mercedes #	220	17.5	238	18.9	142	13.4	45	4.0	0	0.0	0	0.0	0	0.0
Scania #	116	9.2	130	10.3	24	2.3	1	0.1	0	0.0	0	0.0	0	0.0
Volvo #	90	7.2	80	6.4	62	5.8	30	2.7	1	0.0	0	0.0	0	0.0
Other #	831	66.1	809	64.4	833	78.5	1,049	93.2	745	100.0	615	100.0	589	100.0
<i>Total Buses</i>	<i>1,257</i>	<i>100.0</i>	<i>1,257</i>	<i>100.0</i>	<i>1,061</i>	<i>100.0</i>	<i>1,125</i>	<i>100.0</i>	<i>746</i>	<i>100.0</i>	<i>615</i>	<i>100.0</i>	<i>589</i>	<i>100.0</i>
<i>Total Heavy Trucks</i>	<i>16,517</i>		<i>19,368</i>		<i>20,422</i>		<i>19,856</i>		<i>18,959</i>		<i>23,612</i>		<i>24,133</i>	
TOTAL TRUCKS	182,228		223,309		239,270		233,427		243,229		284,069		321,300	

Vehicles are assembled/manufactured locally

* Vehicles are not assembled/manufactured locally

¹ Mitsubishi Canter was sourced from Australia and overseas. Australian assembled vehicle sales were 528 in 1997

² Mitsubishi 3.5 - 7.5t trucks were sourced from Australia and overseas. Australian assembled vehicle sales were 291 in 1997

³ Mitsubishi 15t trucks were sourced from Australia up to 1997

Source: VFACTS, Vehicle Retail Sales

2. Motor vehicle production – Australia

Table 8: Production of Locally Made PMVs and Derivatives

	1996	1997	1998	1999	2000	2001	2002	2003
Falcon Family								
Domestic market	91,786	84,152	78,345	80,410	80,890	68,768	77,382	97,069
Export market	8,329	3,858	5,091	5,662	4,939	4,620	6,225	7,921
Total	100,115	88,010	83,436	86,072	85,829	73,388	83,607	104,990
Commodore Family								
Domestic market	102,518	89,480	107,260	97,401	98,821	101,074	111,416	117,262
Export market	5,488	2,694	9,296	20,075	26,779	28,591	31,745	36,059
Total	108,006	92,174	116,556	117,476	125,600	129,665	143,161	153,321
Vectra								
Domestic market			2,375	7,276	5,132			
Export market			442	2,846	2,419			
Total			2,817	10,122	7,551			
Magna Family								
Domestic market	31,557	41,579	36,957	24,798	26,415	24,287	22,387	27,777
Export market	12,359	17,696	9,549	9,968	12,036	19,215	24,050	9,986
Total	43,916	59,275	46,506	34,766	38,451	43,502	46,437	37,763
Camry Family								
Domestic market	32,517	30,077	46,598	40,392	33,605	26,608	28,971	40,685
Export market	17,879	27,509	34,011	44,654	54,311	65,173	49,819	66,212
Total ¹	50,396	57,586	80,609	85,046	87,916	91,781	78,790	106,897
Avalon								
Domestic market					13,805	8,776	7,507	6,697
Export market					534	62	249	
Total					14,339	8,838	7,756	6,697
Corolla								
Domestic market	23,198	22,221	23,968	14,341				
Export market								
Total	23,198	22,221	23,968	14,341				
TOTAL PRODUCTION								
Domestic market	281,576	267,509	295,503	264,618	258,668	229,513	247,663	289,490
Export market	44,055	51,757	58,389	83,205	101,018	117,661	112,088	120,178
Total	325,631	319,266	353,892	347,823	359,686	347,174	359,751	409,668

¹ Production and export figures for Toyota Camry include CKD units. Source: DITR industry survey

Table 9: Value of production of locally made PMVs (and derivatives)

	1995	1996	1997	1998	1999	2000	2001	2002	2003
Production value (\$b)	7.10	7.11	7.23	8.18	8.18	7.74	7.97	7.99	8.48

Source: DITR industry survey

Table 10: Quality performance of locally made PMVs

Sample Average Faults Per Vehicle ¹						
Category	1998	1999	2000	2001	2002	2003
Medium						
Toyota Camry (4)	1.6	0.8	0.7	0.9	0.8	0.8
<i>Medium Category Average</i>	<i>1.4</i>	<i>1.0</i>	<i>0.8</i>	<i>0.8</i>	<i>0.7</i>	<i>0.6</i>
Large						
Ford Falcon	2.1	1.6	1.5	1.2	1.3	1.4
Holden Commodore	2.4	1.6	1.1	1.1	1.2	1.2
Toyota Camry (V6)	1.4	0.8	1.1	0.7	0.9	0.8
Toyota Avalon			1.0	1.4	0.7	0.9
Mitsubishi Magna	1.4	1.1	0.9	1.0	0.9	0.9
<i>Large Category Average</i>	<i>2.0</i>	<i>1.4</i>	<i>1.1</i>	<i>1.1</i>	<i>1.0</i>	<i>1.0</i>

¹ The faults data reported in this table is derived from responses to surveys of private new car buyers in the first three months of ownership

Source: AC Nielsen, 2003 New Car Buyer Survey

Table 11: Sales of components by FAPM member companies¹

	Domestic sales (\$b)	Export sales (\$b)	Total sales (\$b)	Annual growth (%)
1995	4.72	0.51	5.23	13.1
1996	4.88	0.67	5.55	6.2
1997	4.98	0.72	5.70	2.7
1998	5.10	0.75	5.85	2.6
1999	5.69	1.05	6.74	15.3
2000	5.28	1.17	6.45	-4.3
2001	5.31	1.18	6.49	0.6
2002	6.09	1.37	7.46	14.9
2003	7.02	1.31	8.33	28.4

¹ Sales figures are in current prices.

Source: FAPM

3. Prices

Table 12: Quarterly index of motor vehicle prices, CPI and average weekly earnings

	Quarter	CPI (all groups) ¹	CPI (motor vehicles)	Average weekly earnings ²	AAIR Affordability index ³		Quarter	CPI (all groups) ¹	CPI (motor vehicles)	Average weekly earnings ²	AAIR Affordability index ³
1996	March	119.0	121.7	257.2	211.3	2000	March	125.2	104.6	295.4	282.4
	June	119.8	121.7	257.9	211.9		June	126.2	104.6	148.3	141.8
	September	120.1	119.4	262.6	219.9		September	130.9	102.0	148.7	145.8
	December	120.3	118.6	263.5	222.2		December	131.3	101.6	303.7	298.9
1997	March	120.5	116.3	264.9	227.8	2001	March	132.7	103.5	309.6	299.1
	June	120.2	112.9	268.3	237.6		June	133.8	105.6	313.8	297.2
	September	119.7	114.1	270.8	237.4		September	134.2	106.0	318.4	300.4
	December	120.0	110.5	274.0	248.0		December	135.4	106.6	322.7	302.7
1998	March	120.3	111.4	276.1	247.8	2002	March	136.6	107.6	325.7	302.7
	June	121.0	109.1	279.0	255.8		June	137.6	106.6	330.1	309.7
	September	121.3	106.9	282.2	264.0		September	138.5	105.6	335.1	317.2
	December	121.9	106.0	281.8	265.9		December	139.5	106.6	338.1	317.2
1999	March	121.8	105.5	284.3	269.5	2003	March	141.3	106.1	343.5	323.8
	June	122.3	105.1	283.9	270.1		June	141.3	105.1	348.7	331.8
	September	123.4	105.8	289.5	273.6		September	142.1	104.6	353.1	337.6
	December	124.1	104.1	291.7	280.2		December	142.8	103.8	356.9	343.8

¹ CPI All groups and CPI Motor Vehicle Expenditure class from ABS Catalogue No. 6401.0

² Average Weekly Earnings (full time adults total earnings) re-based from ABS Catalogue No 6302.0

³ All indexes have 1989-90 as base year. The Affordability Index is based on methodology used by the former Automotive Industry Authority and the Australian Automotive Intelligence Report (AAIR).

Source: Australian Bureau of Statistics (see Catalogue Nos. above)

Table 13: Australian dollar value

	Quarter	Yen	US Dollar	Euro	Won
1996	March	83	0.78	-	610
	June	86	0.79	-	640
	September	88	0.79	-	654
	December	93	0.80	-	673
1997	March	97	0.79	-	703
	June	85	0.75	-	662
	September	87	0.72	-	658
	December	85	0.65	-	1089
1998	March	88	0.66	-	921
	June	86	0.61	-	844
	September	81	0.59	-	825
	December	71	0.61	-	731
1999	March	76	0.63	0.59	771
	June	80	0.66	0.64	764
	September	69	0.65	0.61	795
	December	67	0.65	0.65	741
2000	March	64	0.61	0.63	670
	June	63	0.60	0.63	668
	September	59	0.54	0.62	606
	December	64	0.55	0.60	698
2001	March	61	0.49	0.56	651
	June	63	0.51	0.60	660
	September	59	0.49	0.54	644
	December	67	0.51	0.58	673
2002	March	71	0.53	0.61	704
	June	67	0.56	0.57	679
	September	66	0.54	0.55	668
	December	67	0.57	0.54	673
2003	March	71	0.60	0.55	722
	June	77	0.65	0.56	780
	September	73	0.66	0.58	769
	December	80	0.75	0.60	866

Source: Reserve Bank of Australia Statistical Table F11

4. Trade

Table 14: Value and growth of automotive exports¹

	Vehicle exports (\$b)	Components exports (\$b)	Total exports (\$b)	Annual growth (%)
1995	0.66	1.11	1.78	15.6
1996	1.02	1.24	2.26	27.0
1997	1.27	1.45	2.72	20.4
1998	1.30	1.28	2.57	-5.5
1999	1.76	1.49	3.25	26.5
2000	2.42	1.80	4.22	29.8
2001	3.26	1.68	4.94	17.1
2002	3.08	1.75	4.83	-2.2
2003	2.99	1.74	4.72	-2.2

¹ Export figures are in nominal prices
Note: Figures may not add due to rounding

Source: DFAT Stars Database

Table 15: Automotive exports by destination (2003¹)

Region	2001		2002		2003	
	Exports (\$m)	Share (%)	Exports (\$m)	Share (%)	Exports (\$m)	Share (%)
Middle East	1,985	40.2	1,801	37.3	1,892	40.1
NAFTA	1,116	22.6	1,101	22.8	783	16.6
New Zealand	605	12.3	720	14.9	824	17.5
South Korea	335	6.8	364	7.5	447	9.5
Japan	161	3.3	163	3.4	104	2.2
Indonesia	151	3.1	137	2.8	78	1.7
U.K.	66	1.3	76	1.6	53	1.1
Singapore	54	1.1	47	1.0	35	0.8
South America	23	0.5	32	0.7	33	0.7
Rest of World	442	9.0	390	8.1	467	9.8
Total	4,938	100	4,831	100	4,716	100

¹ Export figures are in nominal prices

Source: DFAT Stars Database

Table 16: Exports of CBU PMVs and derivatives

Year	Export Clearances (units) ¹	Annual Growth (%)
1997	50,019	28.2
1998	53,994	7.9
1999	73,450	36.0
2000	94,058	28.1
2001	113,821	21.0
2002	110,459	-3.0
2003	120,256	8.9

¹ Comprises new assembled PMVs with non diesel engine capacity of 1500cc and over (Note: Figure includes vehicles exported but not intended for sale)

Source: DFAT Stars Database

Table 17: Exports of components¹

	1995 (\$ m)	1996 (\$ m)	1997 (\$ m)	1998 (\$ m)	1999 (\$ m)	2000 (\$ m)	2001 (\$ m)	2002 (\$ m)	2003 (\$ m)
Engines	321	283	405	291	356	472	270	180	255
Engine parts	192	195	199	146	153	172	146	159	147
Other components	600	765	844	841	985	1,156	1,262	1,409	1,336
Total	1,112	1,243	1,448	1,278	1,494	1,799	1,678	1,748	1,738

¹ Export figures are in nominal prices

Source: DFAT Stars Database

Table 18: Value and growth of automotive imports¹

	Vehicle imports (\$b)	Components imports (\$b)	Total imports (\$b)	Annual growth (%)
1995	5.61	3.61	9.23	3.9
1996	6.43	4.26	10.69	15.8
1997	7.61	4.44	12.05	12.7
1998	9.38	5.11	14.49	20.2
1999	9.92	5.05	14.96	3.2
2000	11.17	5.77	16.94	13.2
2001	11.61	6.01	17.62	4.0
2002	13.20	5.34	18.54	5.2
2003	14.51	5.76	20.28	9.4

¹ Import figures are in nominal prices

Source: DFAT Stars Database

Table 19: Automotive imports by source (2003)¹

	2001		2002		2003	
	Imports (\$m)	Share (%)	Imports (\$m)	Share (%)	Imports (\$m)	Share (%)
Japan	8,256	46.9	8,762	47.3	9,309	47.4
NAFTA	2,557	14.5	2,823	15.2	2,543	13.0
Germany	1,895	10.8	1,910	10.3	2,221	11.3
Thailand	877	5.0	734	4.0	1,060	5.4
South Korea	680	3.9	726	3.9	772	3.9
U.K.	602	3.4	570	3.1	587	3.0
Sweden	262	1.5	293	1.6	307	1.6
Italy	221	1.3	250	1.3	249	1.3
Austria	104	0.6	133	0.7	191	1.0
Rest of World	2,168	12.2	2,341	12.6	2,395	12.2
Total	17,622	100	18542	100	19,634	100

¹ Import figures are in nominal prices

Source: DFAT Stars Database

Table 20: Imports of CBU PMVs and other motor vehicles

	CBU PMVs (Units)	Other vehicles (Units)	Total vehicles (Units)	Annual Growth (%)
1997	281,265	168,837	450,102	16.7
1998	316,704	213,782	530,486	17.9
1999	288,176	231,596	519,772	-2.0
2000	319,471	234,083	553,554	6.5
2001	330,464	210,657	541,121	-2.2
2002	321,763	259,751	581,514	7.5
2003	360,247	290,538	650,785	11.9

Source: DFAT Stars Database

Table 21: Imports of components¹

	Imports (\$b)	Annual Growth (%)
1995	3.61	2.40
1996	4.26	17.90
1997	4.44	4.40
1998	5.11	14.90
1999	5.05	-1.20
2000	5.77	14.30
2001	6.00	4.00
2002	5.34	-11.00
2003	5.76	12.70

¹ Import figures are in nominal prices

Source: DFAT Stars Database

5. Employment and productivity

Table 22: Automotive industry employment

	1994/95	1995/96	1996/97	1997/98	1998/99	1999/2000	2000/01
Motor vehicle manufacturing¹	22,477	20,872	20,330	19,719	18,168	16,519	23,243
Motor vehicle body manufacturing²	7,345	7,683	7,614	8,443	7,888	10,260	9,908
Automotive electrical and instrument manufacturing³	4,684	5,176	5,420	4,734	5,001	5,287	5,085
Automotive component manufacturing⁴	20,538	22,086	21,868	22,262	20,414	22,422	24,424
Total	55,044	55,817	55,232	55,158	51,471	54,488	62,660

¹ ANZIC Code 2811

² ANZIC Code 2812

³ ANZIC Code 2813

⁴ ANZIC Code 2819

Source: Australian Bureau of Statistics Catalogue No. 8221.0

Table 23: Local vehicle producer labour productivity

	Production volume units²	Production value (\$b)³	Employment⁴	Average vehicles produced per employee	Average production value per employee (\$)
1995	312,908	7.10	19,754	15.8	359,168
1996	325,631	7.11	20,213	16.1	351,818
1997	319,266	7.23	20,540	15.5	351,753
1998¹	353,892	8.18	22,371	15.8	365,563
1999	347,823	8.18	21,394	16.3	382,116
2000	359,686	7.74	20,378	17.7	379,939
2001	347,174	7.97	19,975	17.5	422,051
2002	359,751	7.99	20,914	16.8	390,177
2003	409,668	8.48	23,119	17.7	366,798

¹ Employees of the former Holden Engine Company are included from 1998 onwards

² Production volumes include CKD vehicles for export

³ Production values are in nominal prices

⁴ Includes production and non-production employees

Source: DITR industry survey

6. Profitability and R&D expenditure

Table 24: Profit performance of local vehicle producers¹

	Vehicle Manufacturing		Total PMV activities ²	
	Net trading profit (loss) \$m	Return on sales (%)	Net trading profit (loss) \$m	Return on sales (%)
1995	343	5.0	434	5.0
1996	351	4.9	520	5.7
1997	344	4.9	518	5.4
1998	389	5.0	502	4.6
1999	311	3.9	391	3.8
2000	427	5.1	384	3.3
2001(r)	299	3.4	114	0.7
2002(r)	383	4.6	493	3.1
2003	316	3.7	449	3.8

¹ Profit before tax (current prices) of Holden, Ford Australia, Toyota Motor Corporation Australia, and Mitsubishi Motors Australia

² Includes PMV manufacturing, sales of imported PMVs and shared vehicles, sales of imported components as parts and accessories and component production for local sale and export

Source: ITR industry survey

Table 25: Automotive industry R&D expenditure¹

Financial Year	R&D expenditure (\$'000)	Annual growth (%)
1995-96	317,911	-
1996-97	313,051	-1.5%
1997-98	359,456	14.8%
1998-99	316,626	-11.9%
1999-00	347,945	9.9%
2000-01	381,349	9.6%
2001-02	490,164	28.5%
2002-03	631,127	28.8%

¹ R&D expenditure is in current prices and is for ANZSIC Industry Group 281 *Motor Vehicle and Part Manufacturing*

Source: Australian Bureau of Statistics unpublished data from ABS Catalogue 8104.0