



Australian Government

**Department of Innovation
Industry, Science and Research**

Key Automotive Statistics 2007

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ACKNOWLEDGEMENTS

In 2008, the Commonwealth Department of Innovation, Industry, Science and Research undertook a survey of Australian motor vehicle producers. This survey is conducted annually, and is used to collect data for the previous calendar year. Data collected for 2007 from the motor vehicle producers is current as at July 2008.

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

- Australian Bureau of Statistics
- AC Nielsen Pty Ltd
- Department of Foreign Affairs and Trade (*STARS* Database)
- Federal Chamber of Automotive Industries (*VFACTS* service)
- Federation of Automotive Products Manufacturers

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

If you have any queries, please contact the Automotive Research and Trade Section:

- Telephone: (02) 6213 7965
- Email: kas@innovation.gov.au

GLOSSARY/ABBREVIATIONS

AAIR	Australian Automotive Intelligence Report
ABS	Australian Bureau of Statistics
ATV	All Terrain Vehicle
CBU	Completely Built Up (assembled vehicle)
C/C	Cab Chassis
CKD	Completely Knocked Down (unassembled vehicle)
CPI	Consumer Price Index
CV	Commercial Vehicle
DFAT	Department of Foreign Affairs and Trade
DIISR	Department of Innovation, Industry, Science and Research
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-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
SUV	Sports Utility Vehicle
VFACTS	Vehicle retail sales statistics provided by the FCAI
YTD	Year to Date
4WD (& 4X4)	Four Wheel Drive

MOTOR VEHICLE CLASSIFICATIONS AND DEFINITIONS

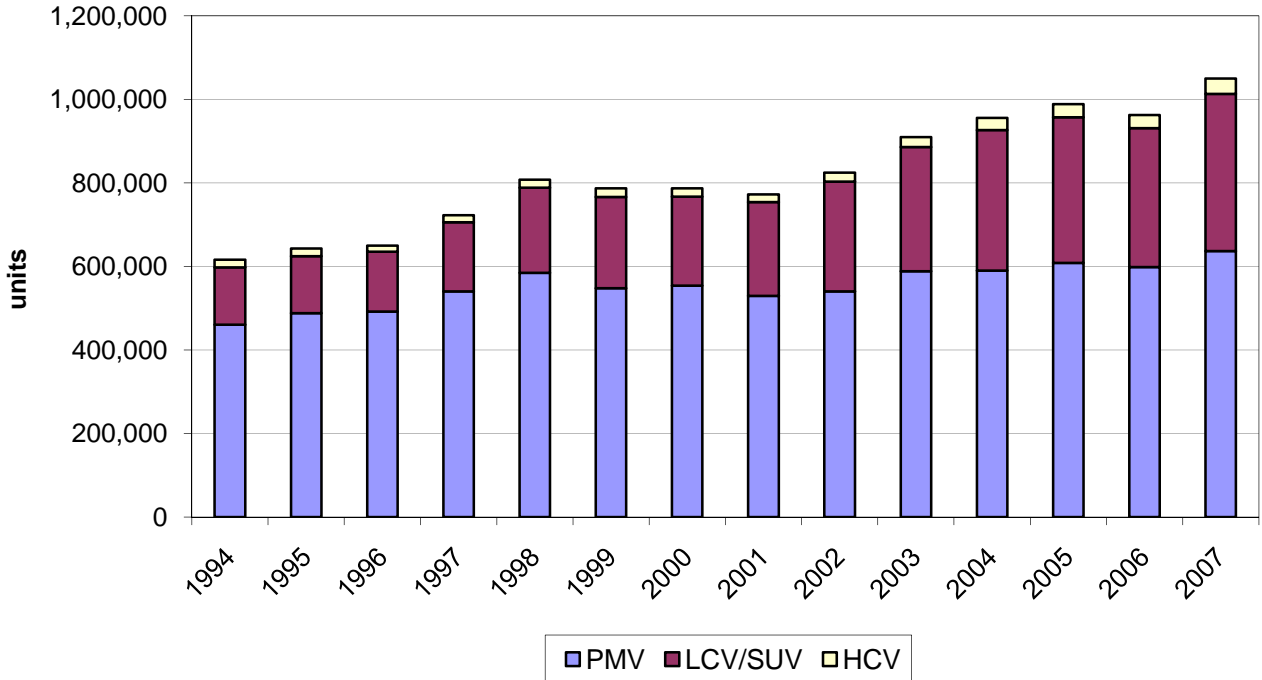
Passenger Motor Vehicles		Light Trucks		Heavy Trucks	
Light	Passenger car, hatch, sedan or wagon, 3 or 4 cyl, up to 1500cc	Vans	Blind and window vans	Trucks	3,501 – 7,500 kgs GVM
Small	Passenger car, hatch, sedan or wagon, 4 to 6 cyl, 1501cc upward	Sports Utility Vehicle	Two or four wheel drive, high ground clearance, closed cargo space	Trucks	7,501 – 15,000 kgs GVM
Medium	Passenger car, hatch, sedan or wagon, 4 to 12 cyl, 1901cc upward	Pick-up / Chassis 4x2	Two wheel drive, central control cab, utility, cab chassis and crew cabs	Trucks	15,001 kgs & over GVM
Large	Passenger car, hatch, sedan or wagon, 6 to 12 cyl	Pick-up / Chassis 4x4	Four wheel drive, central control cab, utility, cab chassis and crew cabs	Buses	3,501 – 7,500 kgs GVM
Upper Large	Passenger car, hatch, sedan or wagon, 6 to 12 cyl	Light Buses	8 seater plus, up to 3,500 kgs GVM	Buses	7,501 kgs & over GVM
People Movers	Passenger usage (may incur commercial duty rates), seating capacity > 7 people	Trucks 2.5-3.5 Tonne	Forward control cab, 2,500-3,500 kgs GVM		
Sports	Coupe or convertible, 3 to 12 cyl				

Source: VFACTS indicative segment classifications

1. MOTOR VEHICLE SALES – AUSTRALIA

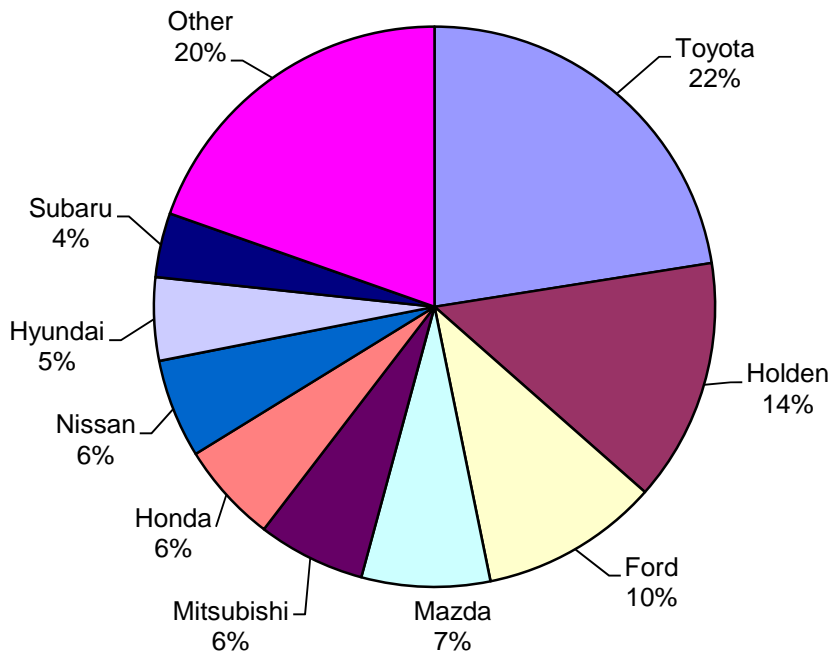
1.1 New Motor Vehicle Sales

Figure 1.1.1 New motor vehicle sales



Reference Table 1

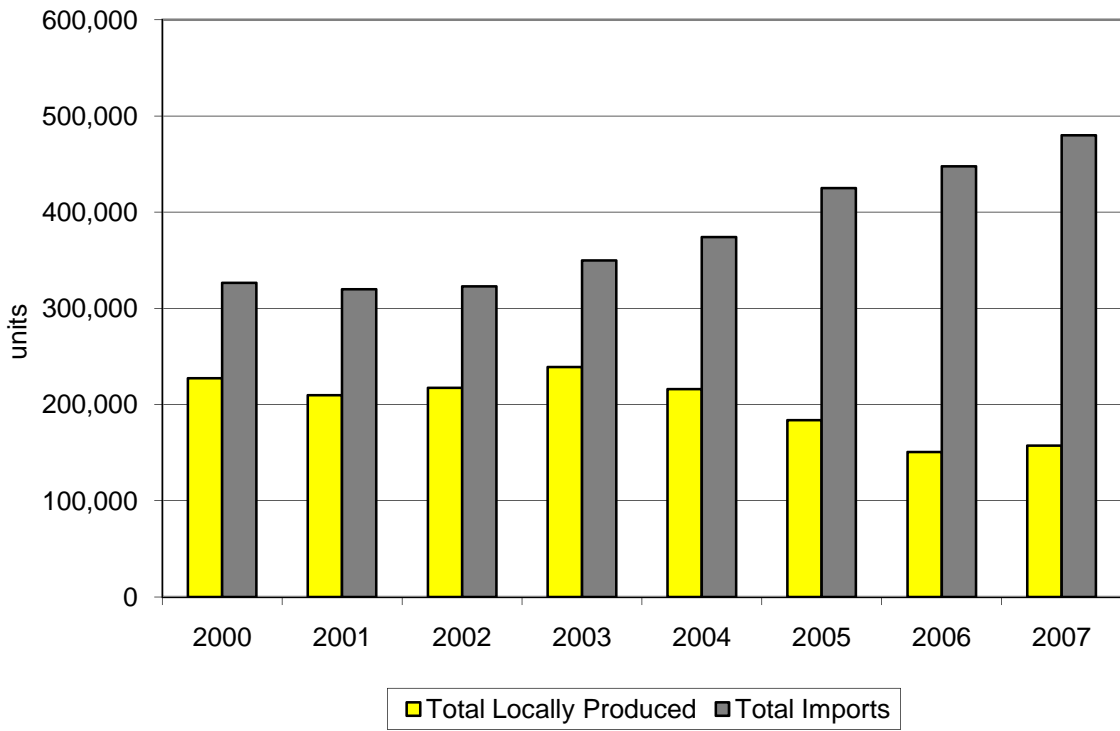
Figure 1.1.2 Total market share by marque (2007)



Reference Table 2

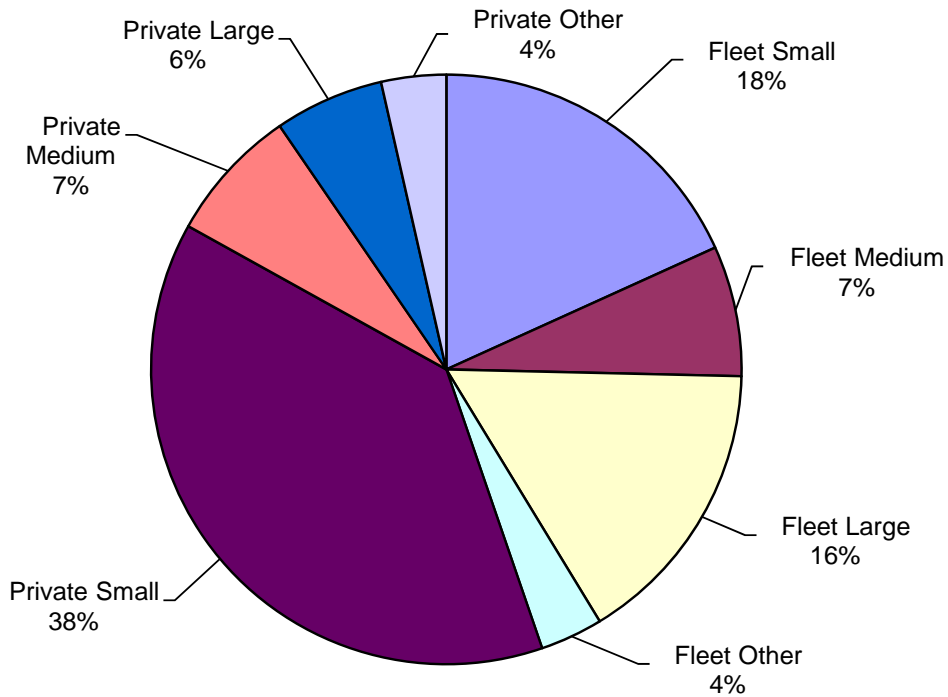
1.2 Passenger Motor Vehicle Sales

Figure 1.2.1 Locally produced and imported PMV sales



Reference Table 4

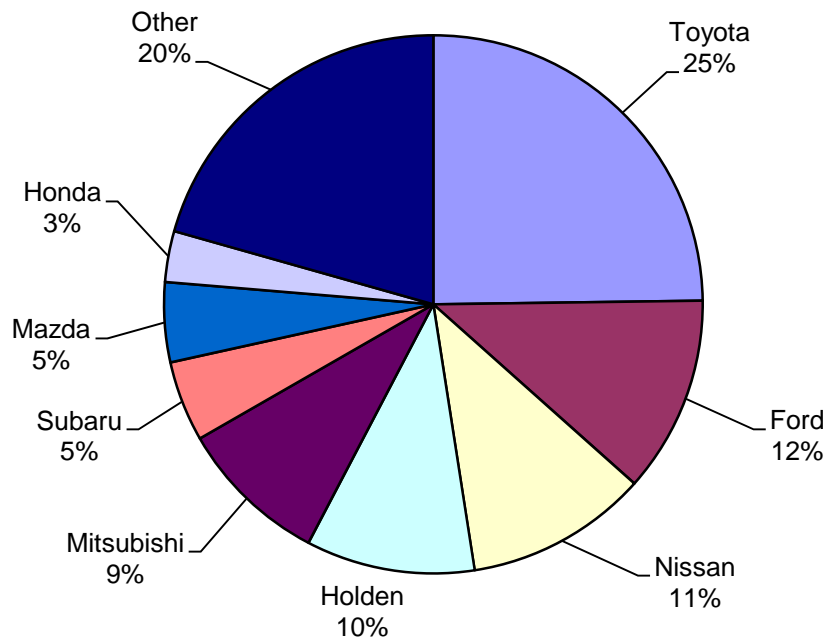
Figure 1.2.2 New PMV market share by vehicle and purchaser types (2007)



Reference Table 5

1.3 Truck (Commercial Vehicle) Sales

Figure 1.3.1 SUVs, Light Trucks and Heavy Trucks: market share by marque (2007)

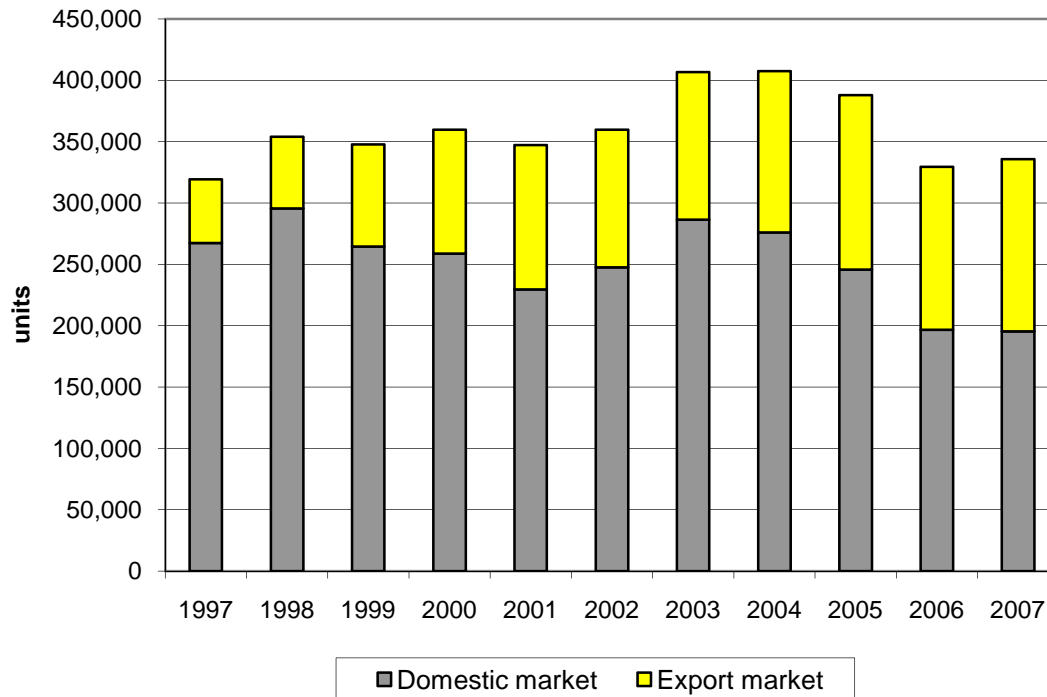


Reference Table 6

2. MOTOR VEHICLE PRODUCTION – AUSTRALIA

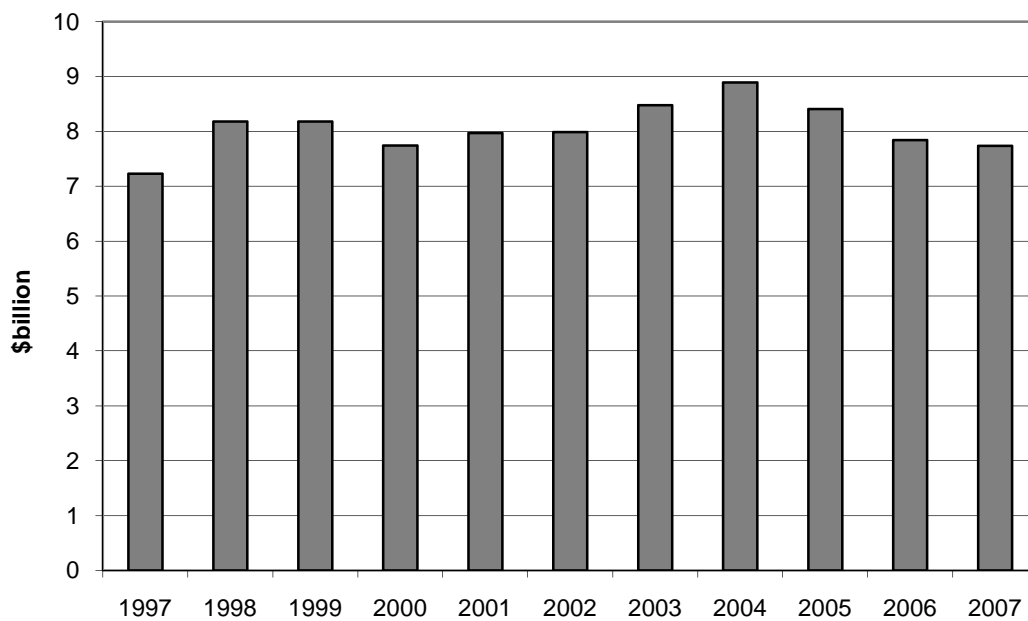
2.1 PMVs and Derivatives

Figure 2.1.1 Markets for locally produced PMVs and derivatives



Reference Table 8

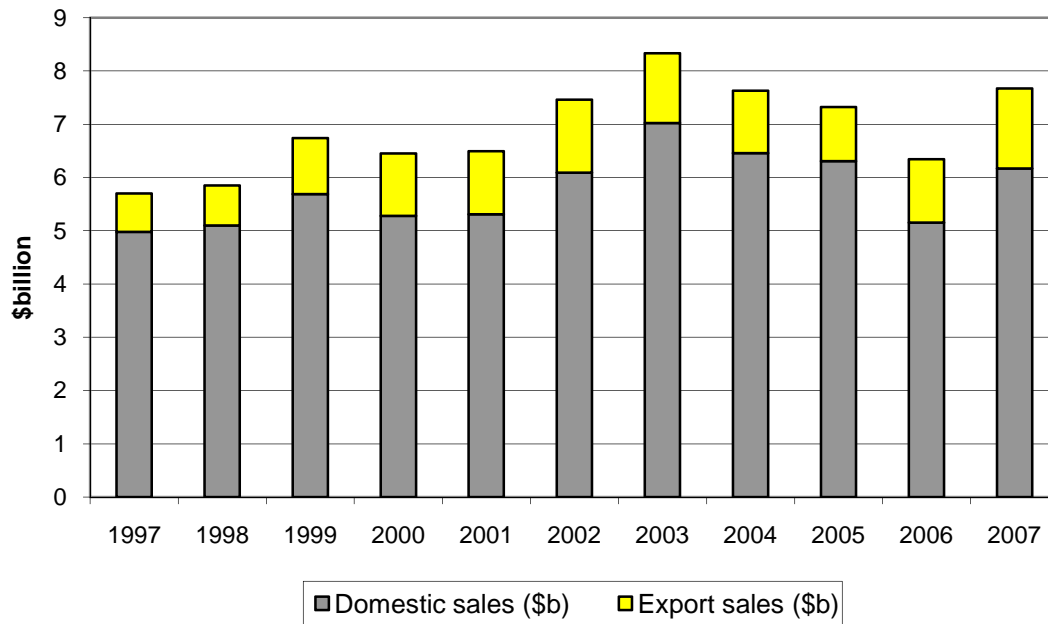
Figure 2.1.2 Value of production of locally made PMVs and derivatives



Reference Table 9

2.2 Component Manufacturers

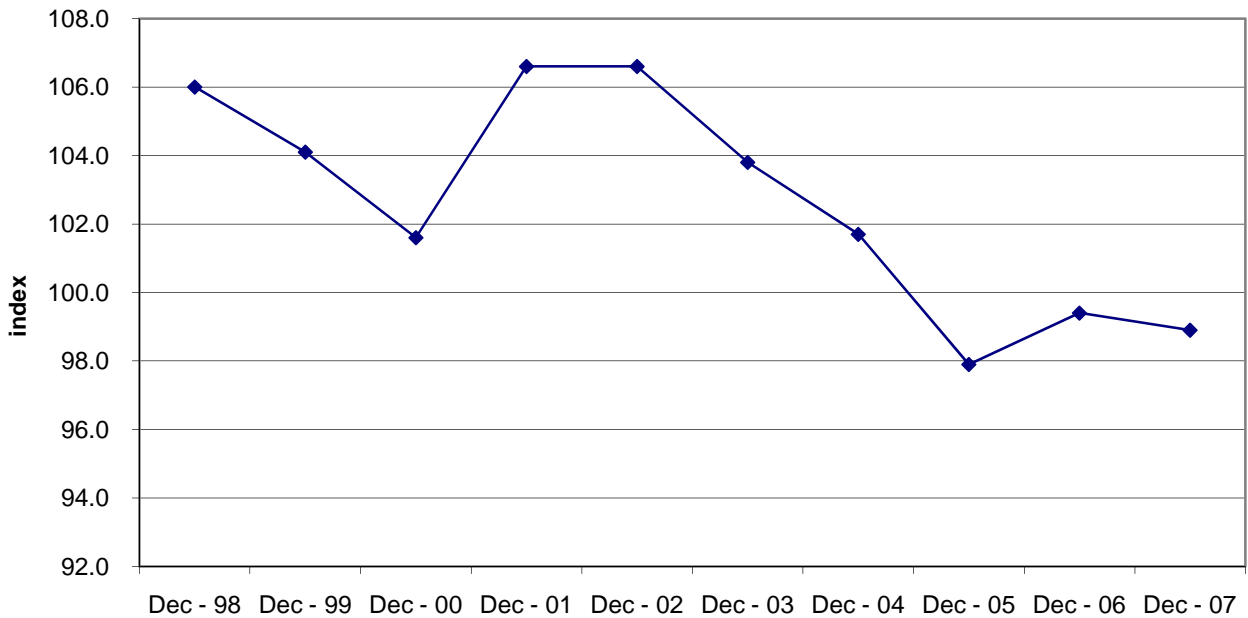
Figure 2.2.1 Sales of components by FAPM member companies



Reference Table 11

3. PRICES

Figure 3.1.1 New motor vehicle price index

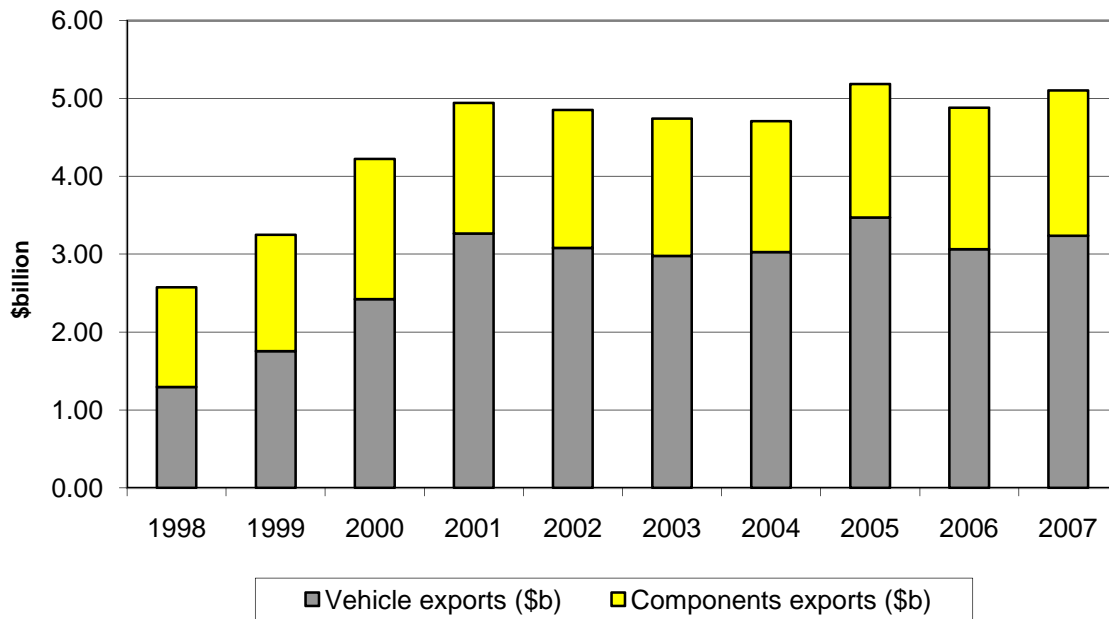


Reference Table 12

4. TRADE

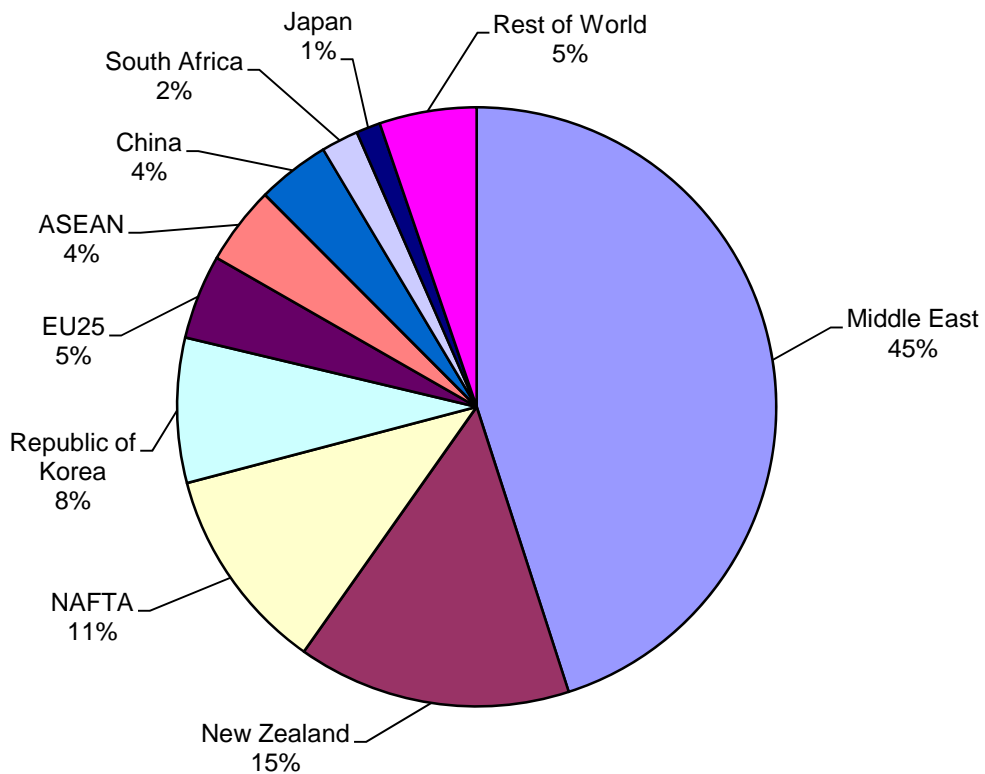
4.1 Exports

Figure 4.1.1 Value of automotive exports



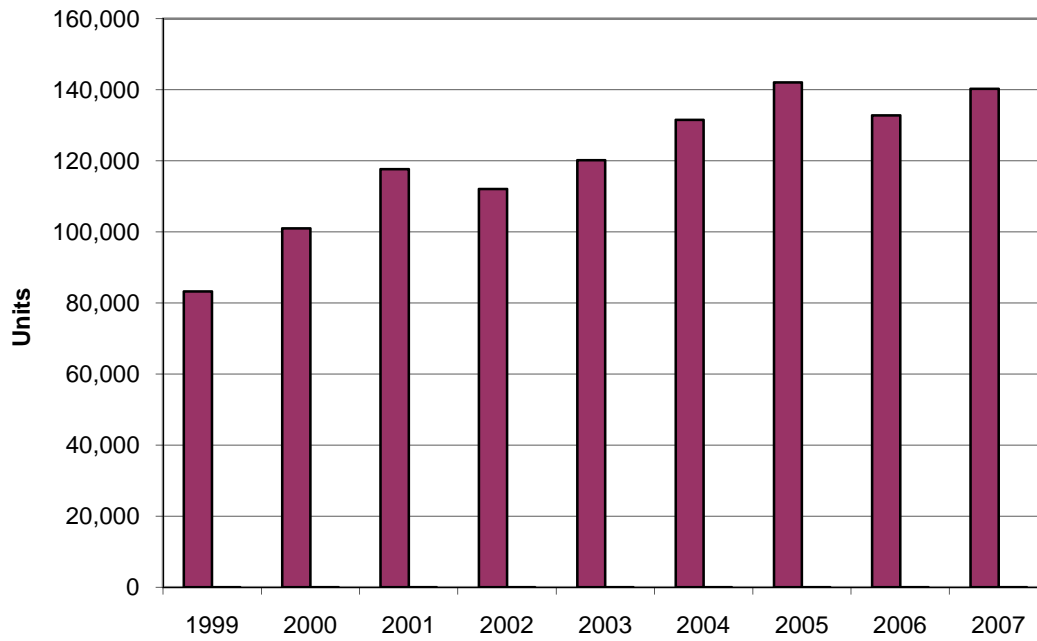
Reference Table 14

Figure 4.1.2 Automotive exports by destination (2007)



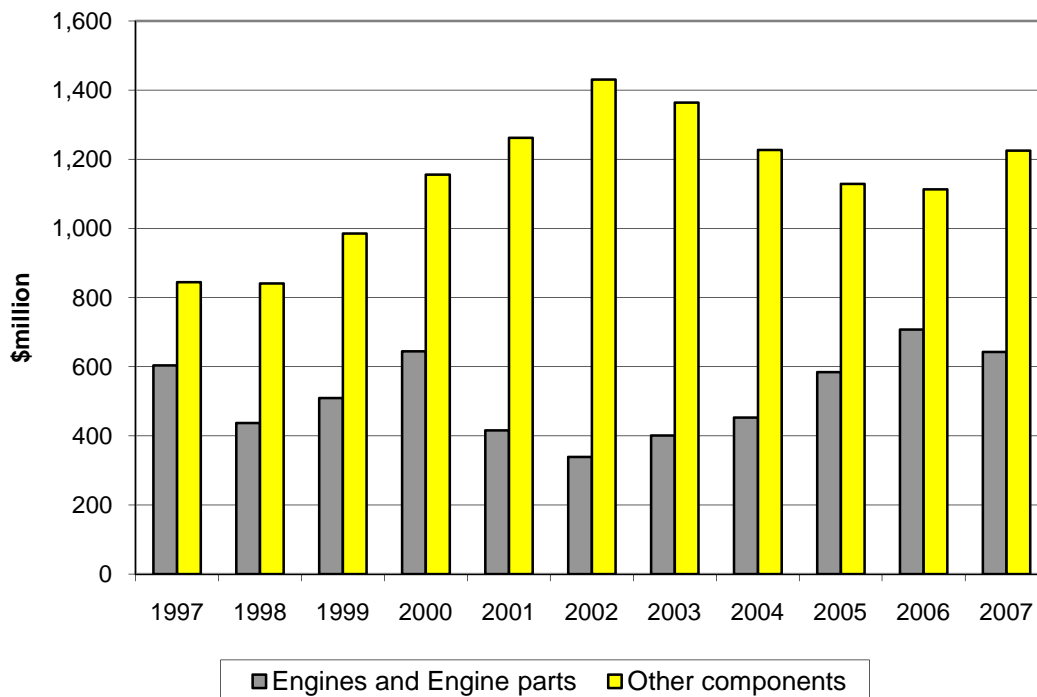
Reference Table 15

Figure 4.1.3 Exports of CBU PMVs, derivatives and SUVs



Reference Table 16

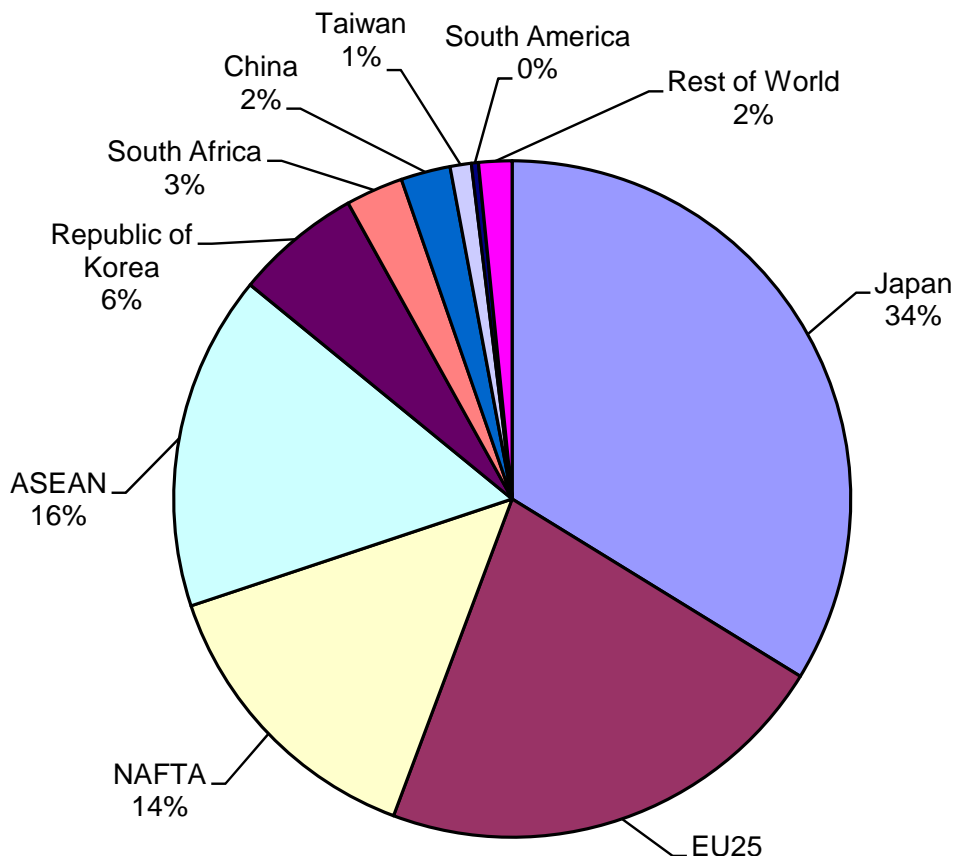
Figure 4.1.4 Exports of components



Reference Table 17

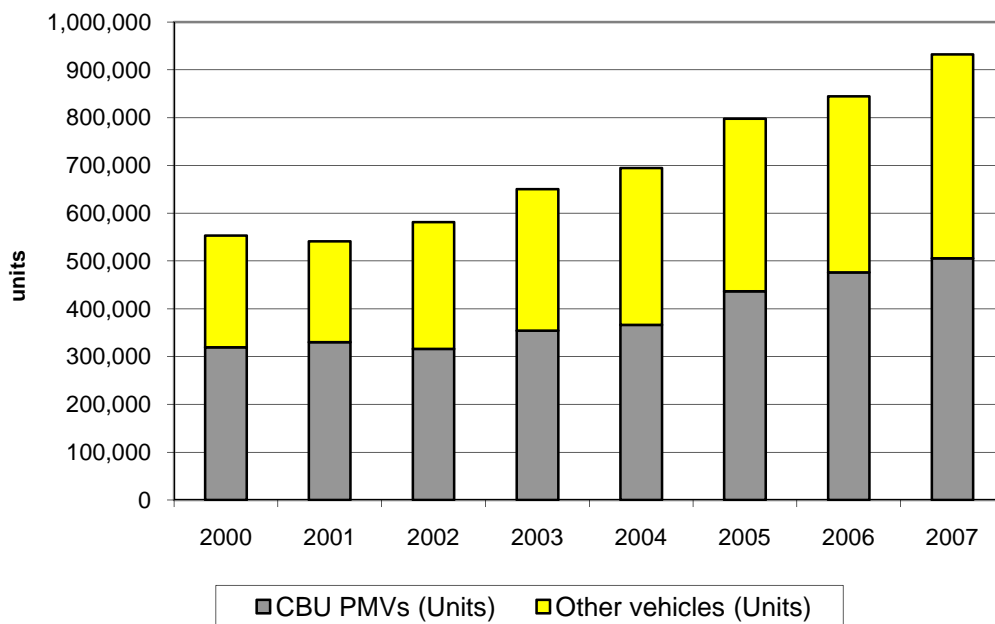
4.2 Imports

Figure 4.2.1 Automotive imports (vehicles and components) by source (2007)



Reference Table 19

Figure 4.2.2 Imports of CBU PMVs and other motor vehicles

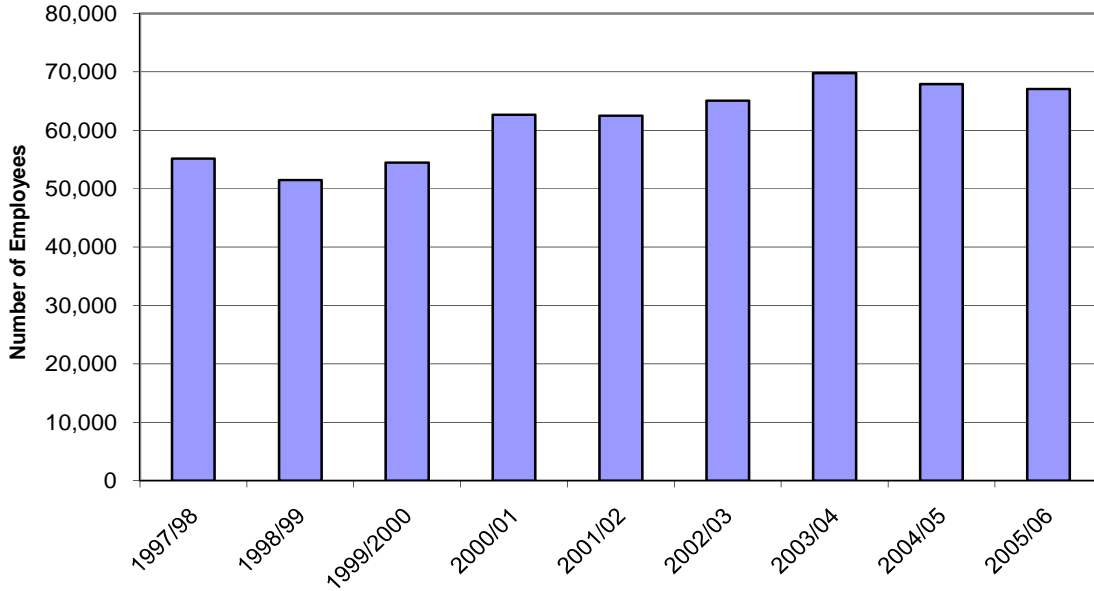


Reference Table 20

5. EMPLOYMENT AND PRODUCTIVITY

5.1 Australian Automotive Industry Employment

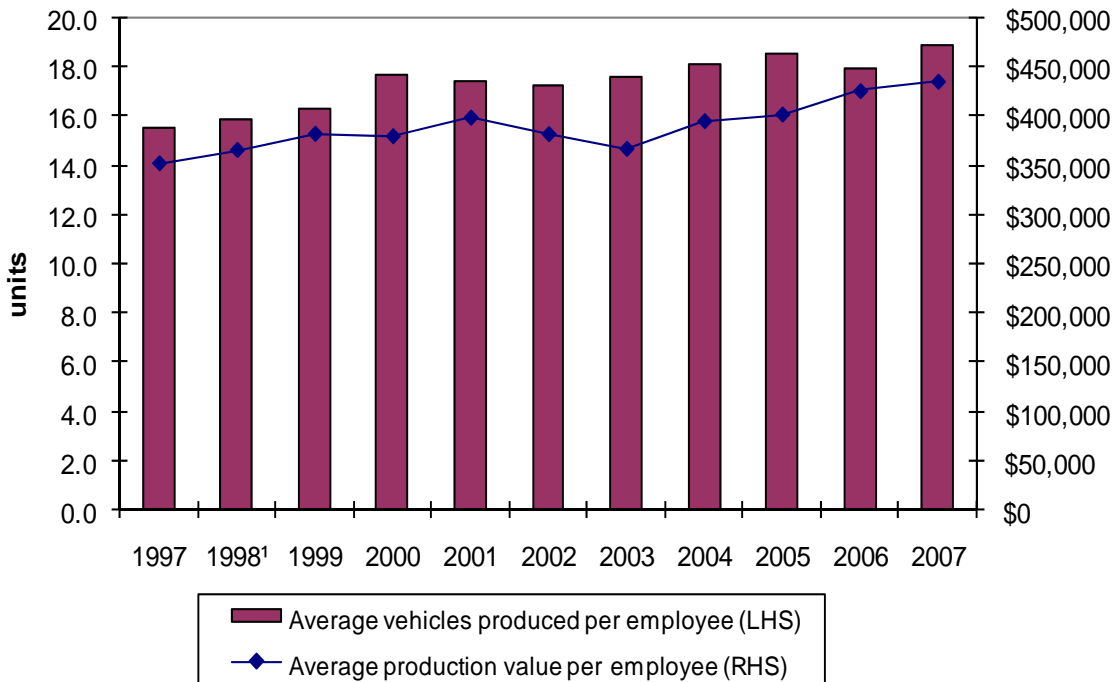
Figure 5.1.1 Automotive industry employment



Reference Table 21

5.2 Productivity

Figure 5.2.1 Local vehicle manufacturer's labour productivity

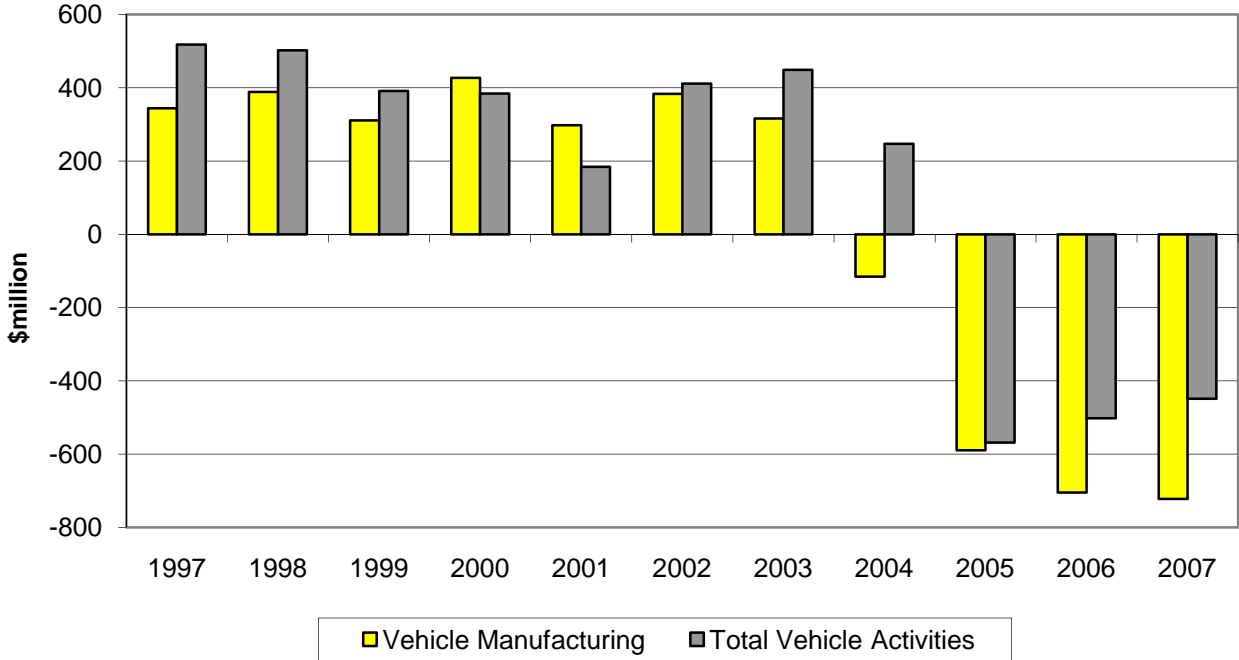


Reference Table 22

6. PROFITABILITY AND R&D EXPENDITURE

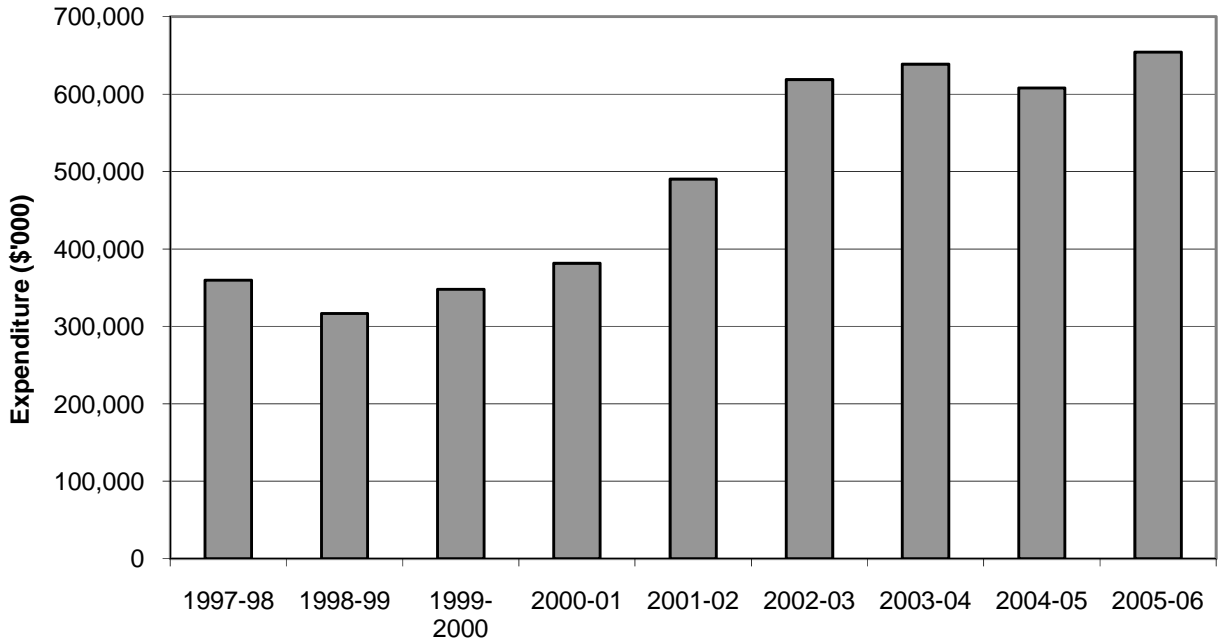
6.1 PMV Manufacturing Profitability

Figure 6.1.1 Local vehicle manufacturers' profit performance



Reference Table 23

Figure 6.2.1 Automotive industry R&D expenditure



Reference Table 24

1. Motor vehicle sales – Australia

Table 1: New motor vehicle sales [Source: VFACTS, Retail Sales]

Year	Passenger		Light Trucks/ SUVs		Heavy Trucks		Total	
	Units	(%)	Units	(%)	Units	(%)	Units	(%)
1994	460,698	74.8	137,252	22.3	18,336	3.0	616,286	100
1995	488,372	76.0	136,449	21.2	17,736	2.8	642,557	100
1996	492,058	75.7	142,830	22.0	15,161	2.3	650,049	100
1997	540,353	74.8	165,711	22.9	16,578	2.3	722,642	100
1998	584,360	72.4	203,941	25.3	19,368	2.4	807,669	100
1999	547,575	69.6	218,848	27.8	20,422	2.6	786,845	100
2000	553,673	70.3	213,571	27.1	19,856	2.5	787,100	100
2001	529,452	68.5	224,270	29.0	18,959	2.5	772,681	100
2002	540,240	65.5	262,937	31.9	21,132	2.6	824,309	100
2003	588,511	64.7	297,167	32.7	24,133	2.7	909,811	100
2004	589,985	61.8	336,763	35.3	28,481	3.0	955,229	100
2005	608,804	61.6	348,170	35.2	31,295	3.2	988,269	100
2006	598,394	62.2	332,638	34.6	31,634	3.3	962,666	100
2007	637,019	60.7	375,732	35.8	37,231	3.5	1,049,982	100

Table 2: Total market share by marque [Source: VFACTS, Retail Sales]

Marque	Market Share (%)													
	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
Toyota	20.6	18.8	18.6	17.4	19.6	19.5	20.2	18.3	19.2	20.5	21.1	20.5	22.2	22.5
Holden	18.8	19.2	19.2	16.6	19.0	19.7	19.7	21.4	21.6	19.3	18.6	17.7	15.2	14.0
Ford	20.3	21.5	20.3	18.0	15.9	16.1	14.5	13.8	13.2	13.9	14.2	13.1	11.9	10.3
Mazda	5.0	4.4	4.1	4.3	3.4	3.4	3.5	4.4	4.7	5.8	5.8	6.7	6.6	7.4
Mitsubishi	12.2	10.1	9.4	11.4	10.4	8.9	9.3	8.8	8.2	8.0	6.0	5.8	5.6	6.2
Honda	2.6	2.2	2.5	2.4	3.2	3.6	3.8	2.7	2.9	3.4	3.8	4.8	5.6	5.8
Nissan	4.1	3.7	3.9	4.5	5.7	6.2	5.8	5.6	6.1	6.4	6.7	5.7	5.5	5.7
Hyundai	4.0	5.4	7.5	8.3	7.1	6.0	5.8	5.2	4.1	3.4	4.5	4.9	4.8	4.8
Subaru	1.4	1.2	1.3	2.0	2.5	3.2	3.4	3.5	3.4	3.3	3.5	3.6	3.9	3.7
Other	11.0	13.5	13.2	15.1	13.2	13.4	14.0	16.3	16.6	16.0	15.8	17.3	18.7	19.6
Total	100	100	100	100	100	100	100	100	100	100	100	100	100	100

Table 3: Sales volume and market share by segment¹ [Source: VFACTS, Retail Sales]

Model Line	2000	Share (%)	2001	Share (%)	2002	Share (%)	2003	Share (%)	2004	Share (%)	2005	Share (%)	2006	Share (%)	2007	Share (%)
Passenger																
Light	89,977	11.4	66,942	8.7	66,235	8.0	76,716	8.4	83,944	8.8	95,890	9.7	116,086	12.1	127,891	12.2
Small	154,050	19.6	162,046	21.0	164,943	20.0	175,651	19.3	181,160	19.0	218,013	22.1	219,358	22.8	232,388	22.1
Medium	40,628	5.2	37,387	4.8	38,951	4.7	47,164	5.2	49,983	5.2	86,234	8.7	87,624	9.1	92,579	8.8
Large	198,766	25.3	190,303	24.6	188,348	22.8	203,524	22.4	181,678	19.0	167,381	16.9	136,606	14.2	139,677	13.3
Upper Large											6,823	0.7	7,334	0.8	9,346	0.9
People Movers	11,736	1.5	12,140	1.6	12,791	1.6	11,852	1.3	15,232	1.6	15,738	1.6	15,442	1.6	16,202	1.5
Sports	9,544	1.2	8,820	1.1	13,988	1.7	10,175	1.1	8,903	0.9	18,725	1.9	15,944	1.7	18,936	1.8
Prestige	29,590	3.8	22,773	2.9	24,830	3.0	29,167	3.2	37,079	3.9						
Luxury	19,382	2.5	29,041	3.8	30,154	3.7	34,262	3.8	32,006	3.4						
Total Passenger	553,673	70.3	529,452	68.5	540,240	65.5	588,551	64.7	589,985	61.8	608,804	61.6	598,394	62.2	637,019	60.7
Light Trucks																
Light Buses	1,619	0.2	1,277	0.2	1,615	0.2	1,787	0.2	1,544	0.2	2,298	0.2	2,622	0.3	2,465	0.2
Vans	19,006	2.4	16,870	2.2	18,270	2.2	21,598	2.4	22,387	2.3	21,571	2.2	20,453	2.1	20,300	1.9
SUVs	105,510	13.4	116,236	15.0	138,064	16.7	150,578	16.6	173,087	18.1	180,292	18.2	170,847	17.7	198,176	18.9
PU/CC 4X2	47,276	6.0	53,817	7.0	59,516	7.2	70,966	7.8	79,298	8.3	79,534	8.0	69,545	7.2	70,606	6.7
PU/CC 4X4	39,533	5.0	35,371	4.6	42,039	5.1	50,670	5.6	58,692	6.1	62,728	6.3	67,639	7.0	82,691	7.9
Trucks 2,500-3,500 kgs GVM	627	0.1	699	0.1	953	0.1	1,568	0.2	1,755	0.2	1,747	0.2	1,532	0.2	1,494	0.1
Total Light Trucks	213,571	27.1	224,270	29.0	260,457	31.6	297,167	32.7	336,763	35.3	348,170	35.2	332,638	34.6	375,732	35.8
Heavy Trucks																
Trucks 3,501-7,500 kgs GVM	7,705	1.0	7,598	1.0	10,569	1.3	8,480	0.9	9,585	1.0	11,191	1.1	11,488	1.2	12,579	1.2
Trucks 7,501-15,000 kgs GVM	5,163	0.7	3,892	0.5	4,365	0.5	4,837	0.5	5,947	0.6	6,992	0.7	7,116	0.7	8,357	0.8
Trucks 15,001+ kgs GVM	5,863	0.7	6,723	0.9	8,063	1.0	10,227	1.1	12,132	1.3	12,274	1.2	12,292	1.3	15,370	1.5
Buses	1,125	0.1	746	0.1	615	0.1	589	0.1	817	0.1	838	0.1	738	0.1	925	0.1
Total Heavy Trucks	19,856	2.5	18,959	2.5	23,612	2.9	24,133	2.7	28,481	3	31,295	3.2	31,634	3.3	37,231	3.5
TOTAL VEHICLES	787,100	100	772,681	100	824,309	100	909,811	100	955,229	100	988,269	100	962,666	100	1,049,982	100

¹From 2005, prestige and luxury cars have been merged into other categories

Table 4: Sales volume and segment share of locally produced and imported PMVs by segment¹ [Source: VFACTS, Retail Sales]

Model Line	2000	Share (%)	2001	Share (%)	2002	Share (%)	2003	Share (%)	2004	Share (%)	2005	Share (%)	2006	Share (%)	2007	Share (%)
Light and small segments																
Locally Produced	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
Imports	244,027	44.1	228,988	43.3	231,178	42.8	252,367	42.9	265,104	44.9	313,903	51.6	335,444	56.1	360,279	56.6
Total Light/Small	244,027	44.1	228,988	43.3	231,178	42.8	252,367	42.9	265,104	44.9	313,903	51.6	335,444	56.1	360,279	56.6
Medium segment																
Camry 4 (inc Apollo 4)	19,644	3.5	18,256	3.4	20,536	3.8	25,261	4.3	26,286	4.5	24,446	4.0	24,221	4.0	26,336	4.1
Locally Produced	25,132	4.5	18,256	3.4	20,536	3.8	25,261	4.3	26,286	4.5	24,446	4.0	24,221	4.0	26,336	4.1
Imports	15,496	2.8	20,037	3.8	18,415	3.4	21,903	3.7	23,697	4.0	61,788	10.1	63,403	10.6	66,243	10.4
Total Medium	40,628	7.3	38,293	7.2	38,951	7.2	47,164	8.0	49,983	8.5	86,234	14.2	87,624	14.6	92,579	14.5
Large segment																
Commodore (inc Lexcen)	83,610	15.1	85,246	16.1	88,478	16.4	86,553	14.7	79,170	13.4	66,794	11.0	56,531	9.4	57,307	9.0
Falcon/Fairmont	60,460	10.9	53,534	10.1	54,629	10.1	73,220	12.4	65,384	11.1	53,080	8.7	42,390	7.1	33,941	5.3
Camry 6; Vienta (inc Apollo 6); Avalon; Aurion	22,449	4.1	20,230	3.8	19,004	3.5	19,343	3.3	19,654	3.3	14,995	2.5	9,431	1.6	22,044	3.5
Magna 6/Verada/380	26,271	4.7	24,381	4.6	23,405	4.3	23,666	4.0	15,968	2.7	16,017	2.6	13,065	2.2	10,948	1.7
Locally Produced	192,790	34.8	183,391	34.6	185,516	34.3	202,782	34.5	180,176	30.5	150,886	24.8	121,417	20.3	124,240	19.5
Imports	5,976	1.1	6,736	1.3	2,832	0.5	742	0.1	1,502	0.3	16,495	2.7	15,189	2.5	15,437	2.4
Total Large	198,766	35.9	190,127	35.9	188,348	34.9	203,524	34.6	181,678	30.8	167,381	27.5	136,606	22.8	139,677	21.9
Other segments²																
Statesman/Caprice	6,370	1.2	5,518	1.0	4,958	0.9	5,424	0.9	4,651	0.8	3,573	0.6	3,076	0.5	4,754	0.7
Monaro ³	0	0.0	176	0.0	4,274	0.8	2,889	0.5	2,656	0.5	2,834	0.5	912	0.2	152	0.0
Fairlane/LTD	3,076	0.6	2,455	0.5	2,101	0.4	2,535	0.4	2,190	0.4	1,980	0.3	1,158	0.2	1,780	0.3
Locally Produced	9,446	1.7	8,149	1.5	11,333	2.1	10,848	1.8	9,497	1.6	8,387	1.4	5,146	0.9	6,686	1.0
Imports	60,806	11.0	63,895	12.1	70,430	13.0	74,608	12.7	83,723	14.2	32,899	5.4	33,574	5.6	37,798	5.9
Total Other	70,252	12.7	72,044	13.6	81,763	15.1	85,456	14.5	93,220	15.8	41,286	6.8	38,720	6.5	44,484	7.0
Total PMVs																
Total Locally Produced	227,368	41.1	209,796	39.6	217,385	40.2	238,891	40.6	215,959	36.6	183,719	30.2	150,784	25.2	157,262	24.7
Total Imports	326,305	58.9	319,656	60.4	322,855	59.8	349,620	59.4	374,026	63.4	425,085	69.8	447,610	74.8	479,757	75.3
Total	553,673	100	529,452	100	540,240	100	588,511	100	589,985	100	608,804	100	598,394	100	637,019	100

¹ The figures from 2005 onwards include changes of classifications;

² Other segments comprise upper large, people movers, sports, prestige and luxury vehicles;

³ Holden Monaro commenced local production in 2001

Table 5: New PMV sales volume and market share by vehicle and purchaser type [Source: VFACTS Sales]

Segment	2000	Share (%)	2001	Share (%)	2002	Share (%)	2003	Share (%)	2004	Share (%)	2005	Share (%)	2006	Share (%)	2007	Share (%)
Fleet PMV sales ¹																
Small segment ²	53,609	9.7	64,978	12.3	76,174	14.1	74,234	12.6	78,072	13.2	89,647	14.7	105,484	17.6	116,054	18.2
Medium segment	20,041	3.6	17,606	3.3	14,531	2.7	19,547	3.3	22,060	3.7	22,671	3.7	40,912	6.8	45,556	7.2
Large segment	150,769	27.2	144,924	27.4	144,099	26.7	159,346	27.1	144,964	24.6	126,712	20.8	104,871	17.5	101,521	15.9
Other ³	30,632	5.5	34,236	6.5	39,277	7.3	40,531	6.9	42,314	7.2	40,124	6.6	17,020	2.8	21,851	3.4
Total Fleet PMV sales	255,051	46.1	261,744	49.4	274,081	50.7	293,658	49.9	287,410	48.7	279,154	45.9	268,287	44.8	284,982	44.7
Private PMV sales																
Small segment ²	190,418	34.4	164,010	31.0	155,004	28.7	178,133	30.3	187,032	31.7	216,408	35.5	229,960	38.4	244,225	38.3
Medium segment	20,587	3.7	20,687	3.9	24,420	4.5	27,617	4.7	27,923	4.7	29,162	4.8	46,712	7.8	47,023	7.4
Large segment	47,997	8.7	45,379	8.6	44,249	8.2	44,178	7.5	36,714	6.2	26,532	4.4	31,735	5.3	38,156	6.0
Other ³	39,620	7.2	37,632	7.1	42,486	7.9	44,925	7.6	50,906	8.6	57,548	9.5	21,700	3.6	22,633	3.6
Total Private PMV sales	298,622	53.9	267,708	50.6	266,159	49.3	294,853	50.1	302,575	51.3	329,650	54.1	330,107	55.2	352,037	55.3
Total PMV sales	553,673	100	529,452	100	540,240	100	588,511	100	589,985	100	608,804	100	598,394	100	637,019	100

¹ Fleet sales include sales to private businesses and government;

² Small segment includes light and small vehicles;

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

Table 6: SUVs, Light Trucks and Heavy Trucks: sales volumes and market shares by marque [Source: VFACTS, Retail Sales]

Marque	2003		2004		2005		2006		2007	
	Volume	Share (%)	Volume	Share (%)	Volume	Share (%)	Volume	Share (%)	Volume	Share (%)
Toyota	83,765	26.1	93,510	25.6	92,579	24.4	99,072	27.2	102,324	24.8
Ford	37,103	11.5	51,100	14.0	58,149	15.3	47,966	13.2	48,794	11.8
Nissan	37,364	11.6	38,818	10.6	35,929	9.5	39,890	11.0	45,225	11.0
Holden	42,852	13.3	53,172	14.6	51,634	13.6	38,119	10.5	41,832	10.1
Mitsubishi	23,887	7.4	24,062	6.6	28,520	7.5	26,471	7.3	37,277	9.0
Subaru	17,167	5.3	18,510	5.1	18,424	4.9	19,447	5.3	19,967	4.8
Mazda	13,085	4.1	12,546	3.4	11,436	3.0	10,085	2.8	19,781	4.8
Honda	10,685	3.3	9,450	2.6	9,673	2.5	10,627	2.9	12,646	3.1
Other	55,392	17.4	64,076	17.5	73,121	19.3	72,595	19.9	85,117	20.6
TOTAL	321,300	100	365,244	100	379,465	100	364,272	100	412,963	100

Table 7: SUV and Truck Sales volume and segment share by model [Source: VFACTS, Retail Sales]

Model Line	2001	Share (%)	2002	Share (%)	2003	Share (%)	2004	Share (%)	2005	Share (%)	2006	Share (%)	2007	Share (%)
SUVs and Light Trucks														
Ford Territory #	0	0.0	0	0.0	0	0.0	13,583	4.0	23,454	6.7	18,364	5.5	17,290	4.6
Ford Falcon Ute #	16,955	7.6	17,883	6.9	20,212	6.8	20,123	6.0	18,384	5.3	15,858	4.8	13,758	3.7
Holden Adventra #	0	0.0	0	0.0	0	0.0	2,500	0.7	3,153	0.9	2,543	0.8	655	0.2
Holden Utility 4x2 #	11,173	5.0	13,791	5.3	17,211	5.8	20,813	6.2	18,877	5.4	13,377	4.0	11,511	3.1
Holden Utility 4X4 #	0	0.0	0	0.0	0	0.0	1,559	0.5	1,325	0.4	697	0.2	9	0.0
Other	196,142	87.5	228,783	87.8	259,744	87.4	278,185	82.6	282,977	81.3	281,799	84.7	332,509	88.5
Total Light Trucks	224,270	100	260,457	100	297,167	100	336,763	100	348,170	100	332,638	100	375,732	100.0
Heavy Trucks														
3.501 - 7.5 Tonnes														
Mitsubishi Canter *	1,322	17.4	1,278	12.1	1,391	16.4	1,727	18.0	2,057	18.4	1,791	15.6	1,955	15.5
Other	6,276	82.6	9,291	87.9	7,089	83.6	7,858	82.0	9,134	81.6	9,697	84.4	10,624	84.5
3.501 - 7.5 Tonnes Total	7,598	100	10,569	100	8,480	100	9,585	100	11,191	100	11,488	100	12,579	100.0
7.501 - 15 Tonnes														
Isuzu *	1,670	42.9	1,809	41.4	1,881	38.9	2,311	38.9	2,785	39.8	2,581	36.3	3,121	37.3
Hino *	1,187	30.5	1,336	30.6	1,725	35.7	2,140	36.0	2,300	32.9	2,420	34.0	2,725	32.6
Mitsubishi *	447	11.5	422	9.7	474	9.8	585	9.8	963	13.8	1,094	15.4	1,455	17.4
Other	588	15.1	798	18.3	757	15.7	911	15.3	944	13.5	1,021	14.3	1,056	12.6
7.501 - 15 Tonnes Total	3,892	100	4,365	100	4,837	100	5,947	100	6,992	100	7,116	100	8,357	100.0
Over 15 Tonnes														
International #	12	0.2	35	0.4	13	0.1	79	0.7	210	1.7	203	1.7	263	1.7
Kenworth #	678	10.1	1,319	16.4	1,658	16.2	2,289	18.9	2,283	18.6	2,053	16.7	2,757	17.9
Mack #	715	10.6	697	8.6	909	8.9	1,076	8.9	1,123	9.1	1,082	8.8	1,339	8.7
Volvo #	942	14.0	858	10.6	1,144	11.2	1,164	9.6	1,137	9.3	1,138	9.3	1,383	9.0
Mitsubishi *	145	2.2	148	1.8	473	4.6	567	4.7	684	5.6	788	6.4	1,059	6.9
Mercedes *	175	2.6	279	3.5	426	4.2	422	3.5	408	3.3	345	2.8	367	2.4
Other	4,054	60.3	4,727	58.6	5,604	54.8	6,535	53.9	6,429	52.4	6,683	54.4	8,202	53.4
Total Over 15 Tonnes	6,723	100	8,063	100	10,227	100	12,132	100	12,274	100	12,292	100	15,370	100
Buses														
Volvo #	1	0.1	0	0	0	0	0	0	0	0	0	0	0	0.0
Other #	745	99.9	615	100	589	100	817	100	838	100	738	100	925	100
Total Buses	746	100	615	100	589	100	817	100	838	100	738	100	925	100
Total Heavy Trucks	18,959		23,612		24,133		28,281		31,295		31,634		37,231	
TOTAL TRUCKS	243,229		284,069		321,300		365,044		379,465		364,272		412,963	

Vehicles are assembled/manufactured locally. * Vehicles are not assembled/manufactured locally.

2. Motor vehicle production – Australia

Table 8: Production (units) of locally made PMVs, derivatives and SUVs [Source: DIISR Survey]

Model	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
Ford Falcon Family Total	88,010	83,436	86,072	85,829	73,388	83,607	104,990	92,747	79,595	60,847	49,701
<i>Domestic market</i>	84,152	78,345	80,410	80,890	68,768	77,382	97,069	86,389	73,972	56,470	46,159
<i>Export market</i>	3,858	5,091	5,662	4,939	4,620	6,225	7,921	6,358	5,623	4,377	3,542
Ford Territory Total								18,266	28,431	20,623	18,877
<i>Domestic market</i>								16,274	23,710	17,988	16,607
<i>Export market</i>								1,992	4,721	2,635	2,270
Holden Commodore Family Total	92,174	116,556	117,476	125,600	129,665	143,161	153,321	165,252	151,901	125,855	107,795
<i>Domestic market</i>	89,480	107,260	97,401	98,821	101,074	111,416	117,262	112,971	91,710	79,828	71,299
<i>Export market</i>	2,694	9,296	20,075	26,779	28,591	31,745	36,059	52,281	60,191	46,027	36,496
Holden Vectra Total		2,817	10,122	7,551							
<i>Domestic market</i>		2,375	7,276	5,132							
<i>Export market</i>		442	2,846	2,419							
Mitsubishi Magna Family Total ¹	59,275	46,506	34,766	38,451	43,502	46,437	34,763	21,418	18,672	10,493	10,321
<i>Domestic market</i>	41,579	36,957	24,798	26,415	24,287	22,387	24,777	15,893	16,174	10,438	10,074
<i>Export market</i>	17,696	9,549	9,968	12,036	19,215	24,050	9,986	5,525	2,498	55	247
Toyota Camry Family Total ²	57,586	80,609	85,046	87,916	91,781	78,790	106,897	104,864	105,481	103,619	111,891
<i>Domestic market</i>	30,077	46,598	40,392	33,605	26,608	28,971	40,685	39,546	36,492	26,172	26,902
<i>Export market</i>	27,509	34,011	44,654	54,311	65,173	49,819	66,212	65,318	68,989	77,447	84,989
Toyota Avalon Total				14,339	8,838	7,756	6,697	4,990	3,741		
<i>Domestic market</i>				13,805	8,776	7,507	6,697	4,990	3,741		
<i>Export market</i>				534	62	249	0	0	0		
Toyota Aurion Total										7,991	37,040
<i>Domestic market</i>										5,790	24,351
<i>Export market</i>										2,201	12,689
TOTAL PRODUCTION	319,266	353,892	347,823	359,686	347,174	359,751	406,668	407,537	387,821	329,428	335,625
<i>Domestic market</i>	267,509	295,503	264,618	258,668	229,513	247,663	286,490	276,063	245,799	196,686	195,382
<i>Export market</i>	51,757	58,389	83,205	101,018	117,661	112,088	120,178	131,474	142,022	132,742	140,243

1 Includes Magna, Verada, Diamante and 380 models

2 Production and export figures for Toyota Camry include CKD units

Table 9: Value of production of locally made PMVs and derivatives [Source: DIISR Survey]

Year	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
Production Value (\$b)	7.23	8.18	8.18	7.74	7.97	7.99	8.48	8.89	8.41	7.84	7.74

Table 10: Quality performance of locally made PMVs [Source: AC Nielson New Car Buyer Survey]

Category	Model	Sample Average Faults Per Vehicle ¹							
		2000	2001	2002	2003	2004	2005	2006	2007
Medium	Toyota Camry (4)	0.7	0.9	0.8	0.8	0.6	0.7	0.5	0.5
	<i>Medium Category Average</i>	0.8	0.8	0.7	0.6	0.6	0.6	0.5	0.5
Large	Ford Falcon	1.5	1.2	1.3	1.4	1.3	1.3	1.0	0.9
	Holden Commodore	1.1	1.1	1.2	1.2	1.3	1.2	1.2	1.4
	Toyota Aurion	na	na	na	na	na	na	0.7	0.6
	Toyota Camry (V6)	1.1	0.7	0.9	0.8	0.7	0.8	0.6	na
	Mitsubishi 380	na	na	na	na	na	na	0.6	0.5
	Toyota Avalon	1.0	1.4	0.7	0.9	1.1	1.1	na	na
	Mitsubishi Magna	0.9	1.0	0.9	0.9	1.0	0.7	na	na
	<i>Large Category Average</i>	1.1	1.1	1.0	1.0	1.0	1.0	0.8	1.0

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

Table 11: Sales of components by FAPM member companies¹ [Source: FAPM]

Year	Domestic Sales		Export Sales		Total Sales	
	Value (\$b)	Annual Growth (%)	Value (\$b)	Annual Growth (%)	Value (\$b)	Annual Growth (%)
1997	4.98	2.0	0.72	7.5	5.70	2.7
1998	5.10	2.4	0.75	4.2	5.85	2.6
1999	5.69	11.6	1.05	40.0	6.74	15.2
2000	5.28	-7.2	1.17	11.4	6.45	-4.3
2001	5.31	0.6	1.18	0.9	6.49	0.6
2002	6.09	14.7	1.37	16.1	7.46	14.9
2003	7.02	15.3	1.31	-4.4	8.33	11.7
2004	6.46	-8.0	1.17	-10.7	7.63	-8.4
2005	6.31	-2.4	1.02	-13.2	7.32	-4.0
2006	5.15	-18.3	1.19	17.2	6.34	-13.4
2007	6.17	19.7	1.51	26.5	7.67	21.0

¹ Sales figures are in current prices.

3. Prices

Table 12: Quarterly index¹ of motor vehicle prices, CPI and average weekly earnings [Source: ABS Cat No: 6401.0 & 6302.0]

Year	Quarter	CPI (all groups) ²	CPI (motor vehicles)	Average Weekly Earnings ³	AAIR Affordability Index ⁴	Year	Quarter	CPI (all groups) ²	CPI (motor vehicles)	Average Weekly Earnings ³	AAIR Affordability Index ⁴
1998	March	120.3	111.4	137.0	123.0	2003	March	141.3	106.1	169.0	159.3
	June	121.0	109.1	138.0	126.5		June	141.3	105.1	172.9	164.5
	September	121.3	106.9	139.5	130.5		September	142.1	104.6	174.9	167.2
	December	121.9	106.0	141.1	133.1		December	142.8	103.8	177.5	171.0
1999	March	121.8	105.5	140.9	133.5	2004	March	144.1	101.9	178.7	175.3
	June	122.3	105.1	142.1	135.2		June	144.8	102.0	178.6	175.1
	September	123.4	105.8	141.9	134.1		September	145.4	100.2	181.5	181.1
	December	124.1	104.1	144.7	139.0		December	146.5	101.7	184.7	181.6
2000	March	125.2	104.6	145.8	139.4	2005	March	147.5	100.3	187.9	187.2
	June	126.2	104.6	147.7	141.2		June	148.4	99.2	190.3	192
	September	130.9	102.0	150.4	147.5		September	149.8	99	192.3	194.4
	December	131.3	101.6	150.8	148.4		December	150.6	97.9	193.9	197.9
2001	March	132.7	103.5	151.8	146.7	2006	March	151.9	99.3	195.1	196.3
	June	133.8	105.6	154.8	146.6		June	154.3	98.3	195.6	199.5
	September	134.2	106.0	156.9	148.0		September	155.7	99.1	197.6	199.2
	December	135.4	106.6	159.2	149.3		December	155.5	99.4	199.0	200.4
2002	March	136.6	107.6	161.3	149.9	2007	March	155.6	99.5	201.2	202.2
	June	137.6	106.6	162.8	152.7		June	157.5	99.7	204.2	204.8
	September	138.5	105.6	165.0	156.3		September	158.6	99.6	207.2	208.0
	December	139.5	106.6	167.5	157.1		December	160.1	98.9	208.5	210.8

1. All indexes have 1989-90 as base year.

2. CPI (all groups) and CPI (motor vehicles) from ABS Cat No 6401.0

3. Average Weekly Earnings (full time adult total earnings) rebased from ABS Cat No 6302.0

4. The Affordability Index is based on methodology used by the Automotive Industry Authority and the AAIR.

Table 13: Australian dollar value [Source: RBA Statistical Table F11]

Year	Quarter	Yen	US Dollar	Euro	Won	Year	Quarter	Yen	US Dollar	Euro	Won
1998	March	86	0.67	-	1025	2003	March	71	0.60	0.55	722
	June	86	0.63	-	865		June	77	0.65	0.56	780
	September	83	0.59	-	783		September	76	0.66	0.58	769
	December	74	0.62	-	781		December	79	0.73	0.60	866
1999	March	75	0.63	0.57	758	2004	March	82	0.76	0.62	893
	June	79	0.66	0.63	772		June	78	0.71	0.59	824
	September	72	0.65	0.61	779		September	78	0.70	0.58	817
	December	67	0.65	0.63	751		December	80	0.77	0.58	819
2000	March	67	0.62	0.64	695	2005	March	82	0.78	0.60	792
	June	62	0.59	0.63	657		June	83	0.77	0.61	776
	September	61	0.57	0.63	631		September	85	0.76	0.62	783
	December	59	0.53	0.61	640		December	87	0.74	0.62	761
2001	March	62	0.52	0.57	666	2006	March	86	0.74	0.61	712
	June	62	0.51	0.59	663		June	86	0.75	0.59	713
	September	62	0.51	0.57	662		September	88	0.76	0.59	724
	December	64	0.51	0.57	662		December	92	0.78	0.60	731
2002	March	69	0.52	0.60	684	2007	March	94	0.79	0.60	742
	June	69	0.56	0.59	690		June	101	0.83	0.62	773
	September	66	0.55	0.56	661		September	100	0.85	0.62	789
	December	68	0.56	0.56	676		December	101	0.90	0.61	825

4. Trade

Table 14: Value and growth of automotive exports¹ [Source: DFAT STARS Database]

Year	Vehicle Exports		Components Exports		Total Exports	
	Value (\$b)	Annual Growth (%)	Value (\$b)	Annual Growth (%)	Value (\$b)	Annual Growth (%)
1998	1.30	2.7	1.28	-10.8	2.57	-5.4
1999	1.76	35.7	1.49	17.1	3.25	26.3
2000	2.42	37.9	1.80	19.9	4.22	29.9
2001	3.26	34.6	1.68	-6.6	4.94	17.0
2002	3.08	-5.6	1.77	3.9	4.85	-1.8
2003	2.98	-3.4	1.77	-0.3	4.74	-2.3
2004	3.03	1.7	1.68	-4.9	4.71	-0.7
2005	3.47	14.7	1.71	2	5.19	10.2
2006	3.06	-11.8	1.82	6.2	4.88	-5.8
2007	3.24	5.7	1.87	2.6	5.11	4.6

¹ Export figures are in nominal prices

Table 15: Automotive exports by destination¹ [Source: DFAT STARS Database]

Region	2002		2003		2004		2005		2006		2007	
	Exports (\$m)	Share (%)	Exports (\$m)	Share (%)	Exports (\$m)	Share (%)	Exports (\$m)	Share (%)	Exports (\$m)	Share (%)	Exports (\$m)	Share (%)
Middle East	1,801	37.1	1,893	39.9	1,745	37.1	1,944	37.5	2,205	45.2	2,299	45.0
New Zealand	720	14.8	825	17.4	758	16.1	789	15.2	653	13.4	754	14.8
NAFTA	1,111	22.9	791	16.7	1,026	21.8	805	15.5	657	13.4	568	11.1
Republic of Korea	365	7.5	449	9.5	324	6.9	386	7.4	389	8.0	399	7.8
EU25	170	3.5	145	3.1	209	4.4	242	4.7	309	6.3	233	4.6
ASEAN	255	5.3	185	3.9	188	4.0	247	4.8	202	4.1	216	4.2
China	16	0.3	58	1.2	65	1.4	285	5.5	91	1.9	200	3.9
South Africa	30	0.6	68	1.4	78	1.7	188	3.6	84	1.7	103	2.0
Japan	164	3.4	105	2.2	85	1.8	64	1.2	61	1.2	67	1.3
Rest of World	221	4.5	224	4.7	230	4.9	237	4.6	233	4.8	268	5.2
Total	4,853	100	4,743	100	4,708	100	5,187	100	4,884	100	5,106	100

¹ Export figures are in nominal prices

Table 16: Exports of new CBU PMVs, derivatives and SUVs [Source: DIISR Survey]

Year	Units	Annual Growth (%)
1999	83,205	42.5
2000	101,018	21.4
2001	117,661	16.5
2002	112,088	-4.7
2003	120,178	7.2
2004	131,474	9.4
2005	142,022	8.0
2006	132,742	-6.5
2007	140,243	5.7

Table 17: Exports of components¹ [Source: DFAT STARS Database]

Component	1997 (\$m)	1998 (\$m)	1999 (\$m)	2000 (\$m)	2001 (\$m)	2002 (\$m)	2003 (\$m)	2004 (\$m)	2005 (\$m)	2006 (\$m)	2007 (\$m)
Engines	405	291	356	472	270	180	255	300	434	575	515
Engine parts	199	146	153	172	146	159	146	153	150	132	128
Other components	844	841	985	1,156	1,262	1,431	1,364	1,227	1,129	1,113	1,225
Total	1,448	1,278	1,494	1,800	1,678	1,770	1,765	1,680	1,713	1,820	1,868

¹ Export figures are in nominal prices

Table 18: Value and growth of automotive imports¹ [Source: DFAT STARS Database]

Year	Vehicle Imports		Components Imports		Total Imports	
	Value (\$b)	Annual Growth (%)	Value (\$b)	Annual Growth (%)	Value (\$b)	Annual Growth (%)
1998	9.38	23.3	5.15	16.3	14.54	20.7
1999	9.92	5.7	5.09	-1.2	15.01	3.2
2000	11.17	12.6	5.78	13.4	16.94	12.9
2001	11.61	4.0	6.02	4.2	17.62	4.0
2002	13.20	13.7	5.71	-5.1	18.91	7.3
2003	14.52	10.0	5.77	1.0	20.29	7.3
2004	15.72	8.2	5.81	0.7	21.52	6.1
2005	17.46	11.1	5.99	3.1	23.45	8.9
2006	18.36	5.2	6.16	2.9	24.52	4.6
2007	20.91	13.9	7.04	14.3	27.95	14.0

¹ Import figures are in nominal prices

Table 19: Automotive imports by source (2006)¹ [Source: DFAT STARS Database]

Source	2002		2003		2004		2005		2006		2007	
	Imports (\$m)	Share (%)	Imports (\$m)	Share (%)	Imports (\$m)	Share (%)	Imports (\$m)	Share (%)	Imports (\$m)	Share (%)	Imports (\$m)	Share (%)
Japan	8,820	46.6	9,330	46.0	9,675	45.0	9,572	40.8	9,129	37.2	9,448	33.8
EU25	4,176	22.1	4,702	23.2	4,686	21.8	5,208	22.2	5,135	20.9	6,128	21.9
ASEAN	951	5.0	1,241	6.1	1,337	6.2	2,159	9.2	2,681	10.9	4,483	16.0
NAFTA	2,972	15.7	2,788	13.7	3,153	14.6	3,090	13.2	3,618	14.8	3,966	14.2
Republic of Korea	767	4.1	784	3.9	949	4.4	1,222	5.2	1,546	6.3	1,687	6.0
South Africa	435	2.3	579	2.9	581	2.7	887	3.8	995	4.1	768	2.7
China	165	0.9	217	1.1	303	1.4	387	1.6	523	2.1	660	2.4
Taiwan	168	0.9	163	0.8	181	0.8	199	0.8	319	1.3	284	1.0
South America	180	0.9	159	0.8	170	0.8	199	0.8	136	0.6	95	0.3
Rest of World	278	1.5	325	1.6	489	2.3	523	2.2	443	1.8	445	1.6
Total	18,910	100	20,288	100	21,523	100	23,445	100	24,524	100	27,944	100

¹ Import figures are in nominal prices

Table 20: Imports of CBU PMVs and other motor vehicles [Source: DFAT STARS Database]

Year	CBU PMVs (Units)	Other Vehicles (Units)	Total Vehicles (Units)	Annual Growth (%)
2000	319,471	234,083	553,554	6.5
2001	330,464	210,657	541,121	-2.2
2002	316,431	264,966	581,397	7.4
2003	354,520	296,209	650,729	11.9
2004	366,547	327,842	694,389	6.7
2005	436,750	360,770	797,520	14.9
2006	476,251	368,521	844,772	5.9
2007	506,136	426,089	932,225	10.4

5. Employment and Labour Productivity

Table 21: Automotive industry employment [Source: ABS Catalogue No: 8221.0]

Industry Sector	1997/98	1998/99	1999/2000	2000/01	2001/02	2002/03	2003/04	2004/05	2005/06
Motor Vehicle Manufacturing ¹	19,719	18,168	16,519	23,243	25,600	26,600	28,100	27,800	27,100
Motor Vehicle Body Manufacturing ²	8,443	7,888	10,260	9,908	10,900	10,300	11,600	12,400	15,300
Automotive Electrical and Instrument Manufacturing ³	4,734	5,001	5,287	5,085	4,200	3,000	3,200	3,500	3,000
Automotive Component Manufacturing ⁴	22,262	20,414	22,422	24,424	21,800	25,200	26,800	24,200	21,800
Total	55,158	51,471	54,488	62,660	62,500	65,100	69,800	67,900	67,100

¹ ANZIC Code 2811; ² ANZIC Code 2812; ³ ANZIC Code 2813; ⁴ ANZIC Code 2819

Table 22: Local vehicle producer labour productivity [Source: DIISR Survey]

Year	Production Volume Units ²	Production Value (\$b) ³	Employment ⁴	Average Vehicles Produced per Employee	Average Production Value per Employee
1997	319,266	7.23	20,540	15.5	\$351,996
1998 ¹	353,892	8.18	22,371	15.8	\$365,652
1999	347,823	8.18	21,394	16.3	\$382,350
2000	359,686	7.74	20,378	17.7	\$379,821
2001	347,174	7.97	19,975	17.4	\$398,999
2002	359,751	7.99	20,914	17.2	\$382,041
2003	406,668	8.48	23,119	17.6	\$366,798
2004	407,537	8.89	22,485	18.1	\$395,375
2005	387,821	8.41	20,908	18.5	\$402,238
2006	329,428	7.84	18,390	17.9	\$426,319
2007	335,625	7.74	17,751	18.9	\$435,947

¹ Employees of the former Holden Engine Plant 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

6. Profitability and R&D expenditure

Table 23: Profit performance of local vehicle producers¹ [Source: DIISR Survey]

Year	Vehicle Manufacturing		Total PMV activities ²	
	Net Trading Profit (loss) \$m	Return on Sales (%)	Net Trading Profit (loss) \$m	Return on Sales (%)
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	298	3.4	184	1.3
2002	383	4.6	411	2.5
2003	316	2.7	449	2.6
2004	-115	-1.0	247	1.3
2005	-590	-6.5	-569	-3.4
2006	-705	-8.0	-502	-2.8
2007	-722	-8.6	-449	-2.5

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

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

Table 24: Automotive industry R&D expenditure¹ [Source: ABS unpublished data from Catalogue 8104.0]

Financial Year	R&D Expenditure (\$'000)	Annual Growth (%)
1997-98	359,456	14.8
1998-99	316,626	-11.9
1999-2000	347,945	9.9
2000-01	381,349	9.6
2001-02	490,164	28.5
2002-03	618,719	26.2
2003-04	638,570	3.2
2004-05	607,903	-4.8
2005-06	654,204	7.6

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