

Key Automotive Industry Statistics October 2009

September 2009 YTD Vehicle sales*

Total new vehicles sold	- Victoria	177,756
“ “ “	- Tasmania	12,255
“ “ “	- Australia	681,974

(* FCAI YTD VFACTS)

Vehicle production*

2006	2007	2008
326,960	334,772	324,118

*Glass's Automotive business intelligence 2009 Black & White Data book total for domestic and export models for Ford, Holden, Mitsubishi and Toyota

Car affordability*

As of Dec 2008, it costs about 30.7 weeks of an average weekly wage to buy a basic six cylinder sedan

(*2009 Glass's Automotive Business Intelligence Black and White Data book)

New vehicle – buyer intentions*

AGE-18-PLUS, 12 Months ending April 2009

		NATIONAL	N.S.W.	Victoria	Tasmania
(unweighted)	uc	49100	17376	10576	1784
(popn. '000)	wc	16372	5656	4093	378
VEHICLE BUYING INTENTION					
Buy a New Vehicle Within 1 year	v%	3.60%	3.20%	4.00%	1.40%
Buy a Used Vehicle Within 1 year	v%	6.90%	5.60%	7.40%	9.20%
Buy a New Vehicle Within 4 years	v%	12.20%	11.50%	12.80%	6.40%
Buy a Used Vehicle Within 4 years	v%	19.90%	18.10%	20.60%	25.00%
Buy a Vehicle Within 4 years (incl. Unsure if New or Used)	v%	33.80%	31.30%	35.40%	32.30%

Roy Morgan Research Pty. Ltd., Melbourne, Australia

Average weekly vehicle running costs*

Results for the least expensive cars to operate

Cheapest Private WOL Costs					
vfacts class	Model	\$Fuel/week	\$Running Costs/Week	WOL Cents/km	WOL \$/Week
Light	Hyundai Getz S TB upgrade 3D hatchback 1.4 L 5 sedan	\$30.97	\$73.08	44.80	\$129.22
Small	Hyundai i30 SX FD 5D hatchback DT4 1.6 L 5 SP manual	\$26.29	\$72.29	51.22	\$147.74
Medium	Kia Magentis EX MG 4D sedan 2.4 L 5 SP manual	\$41.12	\$90.19	66.88	\$192.91
Large	Toyota Aurion Touring SE GSV40R 4D sedan V6 3.	\$50.26	\$90.29	76.81	\$221.57
SUV Compact	Suzuki Grand Vitara (4x4) JT MY07 upgrade 2D W	\$45.69	\$93.59	62.13	\$179.21
SUV Medium	Holden Captiva SX CG MY09 4D wagon DT4 2 L 5 SP	\$40.27	\$88.24	75.99	\$219.21
SUV Large	Nissan Patrol DX (4x4) Walkabout GU VI 4D wagon	\$60.96	\$117.64	92.81	\$267.73
People Mover	Hyundai Trajet V6 2.7 4D wagon V6 2.7 L 4 SP automatic	\$56.86	\$107.53	79.17	\$228.36

(*NRMA 2008 Vehicle Running Costs survey)

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(*NRMA 2008 Vehicle Running Costs survey)

Cars on road*

Registered vehicles - Victoria	3 921 574
“ “ “ - Tasmania	.....	391 327
“ “ “ - Australia	.....	15 296 542
Average age of (passenger) vehicles		
- Victoria	.....	10.1 years
“ “ “ “ - Australia	.....	9.7 years
“ “ “ “ - Tasmania	.....	11.4 years

* ABS cat no 9309.0 as at 31/3/2008 Motor Vehicle Census

No of retail auto businesses

total business count for Australian automotive retail in following sectors		2003-04	2004-05	2005-06	2006-07
5311	Car Retailing	4962	5208	5370	5307
5312	Motor Cycle Dealing	1407	1518	1704	1704
5313	Trailer & Caravan Dealing	459	480	486	498
5321	Automotive Fuel Retailing	5892	5595	5604	5409
5322	Automotive Electrical Services	3708	3699	3648	3540
5323	Smash Repairing	9378	9297	9204	9312
5324	Tyre Retailing	2178	2256	2346	2202
5329	Automotive Repair & Services n.e.c.	24750	25023	25185	25596
7741	Motor Vehicle Hiring	1665	1626	1638	1812
total business count all auto retail sectors		54399	54702	55185	55380

* ABS cat no 8165.0 June 2006 (February 2007 release)

N.B. Any variation from Aust Business Register figures (2004) is due to the exclusion of non trading companies

Automotive industry employees*

Industry sector	Total no of employees August 2009
Motor vehicle & Motor Vehicle Parts manufacturing	52,000
Motor Vehicle and Motor Vehicle Parts Wholesaling	27,200
Motor Vehicle and Motor Vehicle Parts Retailing	92,400
Fuel Retailing	33,700

*ABS 6291.0.55.003 Labour Force, Australia, Detailed, Quarterly Employed persons by industry subdivision and sex national & table eo6 SRD

Automotive industry turnover *

Motor vehicle & Motor vehicle parts wholesaling	\$46.5 billion Australia
Motor vehicle & motor vehicle parts retailing	\$69.2 billion Australia
Fuel retailing	\$31.9 billion Australia

*ABS cat 8155.0 Australian Industry 2007 - 08

Average profit margin

	Motor vehicle and motor vehicle parts retailing
Total income	\$m 69,232
Total expenses	\$m 67,474
Operating profit before tax	\$m 2,234
Profit margin	3.2%

Source ABS 8155 cat Australian industry 2007-08

Imports

Year	Vehicle imports	Component imports	Total imports
2006	18.36 billion	6.16 billion	24.52 billion
2007	20.91 billion	7.04 billion	27.95 billion
2008	22.75 billion	7.10 billion	29.86 billion

<http://www.innovation.gov.au/> Key auto stats 2007 & Australian Automotive Intelligence Yearbook 2009

Exports*

Year	Vehicle exports	Component exports	Total exports
2006	3.06 billion	1.82 billion	4.88 billion
2007	3.24 billion	1.87 billion	5.11 billion
2008	4.06 billion	1.76 billion	5.82 billion

<http://www.innovation.gov.au/> Key auto stats 2007 & Australian Automotive Intelligence Yearbook 2009

Fuel consumption*

Average fuel consumption – Australia **14.0 litres per 100 kms**

Total fuel consumption – Australia **30,047 million litres**

* ABS cat no 9208.0 (12 months ending 31/10/07)

Fuel Price

2008 Australian average 143.64 [unleaded]

source Glass's Automotive business intelligence 2009 Black & White Data book

Kilometres travelled*

*Source Roy Morgan Research PTY LTD Melbourne
AGE-18-PLUS Drivers, 12 months ending April 2009

		STATES			
		NATIONAL	N.S.W.	Victoria	Tasmania
(unweighted)	uc	16731	5645	3391	727
(popn. '000)	wc	13716	4492	3452	327

AVERAGE KILOMETRES DRIVEN (MEANS IN HUNDREDS)					
Less Than 5000 (25)	v%	10.40%	11.60%	9.60%	11.10%
5,000-9,999 (75)	v%	19.80%	19.90%	19.60%	22.00%
10,000-12,499 (112)	v%	16.80%	15.40%	17.20%	18.90%
12,500-14,999 (137)	v%	9.90%	9.60%	9.60%	8.90%
10,000-14,999	v%	26.80%	25.00%	26.80%	27.90%
15,000-17,499 (162)	v%	7.90%	7.80%	8.20%	6.60%
17,500-19,999 (187)	v%	6.40%	6.70%	5.90%	7.80%
20,000-24,999 (225)	v%	10.50%	11.00%	10.50%	8.70%
25,000-29,999 (275)	v%	6.10%	5.60%	6.70%	5.00%
30,000-49,999 (400)	v%	5.60%	5.70%	5.90%	4.90%
50,000-99,999 (750)	v%	2.20%	2.00%	2.10%	3.30%
100,000+ (1150)	v%	0.70%	0.90%	0.80%	0.10%
TOTAL Drivers	v%	100.00%	100.00%	100.00%	100.00%

Average KMS Per Annum	mn	168.36	167.68	171.07	160.72
S.D.	sd	153.83	157.44	155.39	144.24
S.E.	se	1.6	2.59	3.56	6.98

Roy Morgan Research Pty. Ltd., Melbourne, Australia

Road fatalities*

Total road fatalities - Victoria	214
“ “ - Tasmania	53
“ “ - Australia	1,136

* http://www.infrastructure.gov.au/roads/safety/publications/2009/rda_0709.aspx YTD September 2009

Motor vehicle theft*

No of stolen vehicles Australia	51,315
No of stolen vehicles Victoria	11,681
No of stolen vehicles Tasmania	1,271

passenger/light commercial (PLC) thefts

* www.carsafe.com.au fin year 2008/2009

Consumer price index*

June quarter 2008 to June quarter 2009	1.5%
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ABS cat no 6401.0

Cash rates*

90 Day Bill (September 2009)	3.37%
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* www.rba.gov.au

Gross domestic product (March qtr 2009 to June qtr 2009)*

Chain volume measures (trend)	0.3%
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* ABS cat no 5206.0

Unemployment rate (Trend)*

Australia	5.8%
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* ABS cat no 6202.0 September 2009

Award rate of pay (Tradesperson)*

AW824308CAV - The Vehicle Industry - Repair, Services and Retail Award 2002

\$578.20 minimum weekly rate for level 6 classification

\$ 15.22 hourly rate

<http://www.fairwork.gov.au/Pay-leave-and-conditions/Awards/Pages/Find-an-award.aspx?role=employees>

Average weekly earnings (Australia)*

Full-time adult ordinary time earnings (trend estimate)	\$1,197.50
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*as at May 2009 ABS cat no 6302.0 Public & Private sectors

Labour price index (Total Hourly Rates of Pay Excluding Bonuses)*

Australia (trend June qtr 2008 to June qtr 2009)	3.9%
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Victoria (original all sectors -change from corresponding qtr of prev year)	3.5%
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Tasmania (original all sectors -change from corresponding qtr of prev year)	4.3%
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* June quarter 2009 ABS 6345.0

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David Russell (03) 9829 1142 Susie Savage (03) 9829 1141