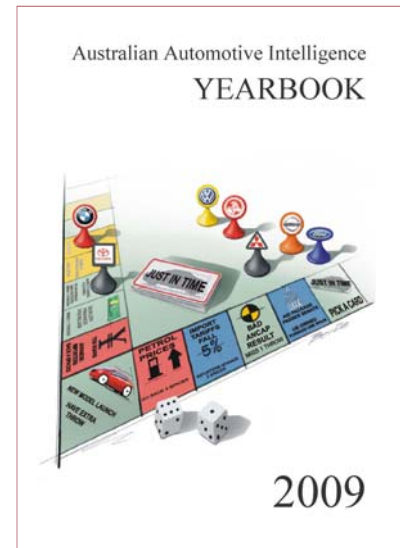




The AAI YEARBOOK is a one-stop reference guide to the automotive market and industry in Australia.

At over 300 pages, it is the most comprehensive information source for the industry, with well sorted data sets, industry reference points and in depth profiles of key industry companies.



Established in 1993,

Australian Automotive Intelligence is a specialised business and policy consultancy which focuses on the Australian automotive industry.

AAI publishes the AAI REPORT and AAI YEARBOOK, assists industry organisations and companies in their submissions to governments and consults with companies on strategic, market and other automotive industry matters.

Led by economist and industry specialist Richard Johns, AAI has developed an enviable reputation for providing comprehensive and independent analysis on a broad range of issues concerning Australia's automotive sector.

AAI's deep knowledge of the Australian market and industry, its ability to see Australia's industry in a global context, as well as long experience in forecasting and a talent for incisive commentary sets AAI apart.



## Australian Automotive Intelligence

### Postal Address

P.O. Box 7260  
St Kilda Road  
Melbourne 8004  
Australia

Tel: + 61 3 9867 5900  
Fax: + 61 3 9867 5955  
Email: [admin@aaintelligence.com.au](mailto:admin@aaintelligence.com.au)  
Web: [www.aaintelligence.com.au](http://www.aaintelligence.com.au)

### Street Address

Suite 703  
34 Queens Road (enter from Hanna Street)  
Melbourne 3004  
Australia

Australian Automotive Intelligence

# YEARBOOK 2009

# Australian Automotive Intelligence

SPECIALISTS ON THE AUSTRALIAN AUTOMOTIVE INDUSTRY AND MARKET

In the current national and global economic climate, access to trusted and specialised automotive industry insights is critical.

Now in its eighth edition, the 2009 YEARBOOK makes available the benefits of more than nine years of direct research and development, as well as more than 15 years of AAI experience.

The 2009 YEARBOOK features:

- new profiles in the Australian component manufacturers chapter
- updates of all profiles, including the most recent financial performance data, and changes that reflect the dynamic nature of the industry.

The 2009 AAI YEARBOOK comprises 5 chapters that together provide a unique and comprehensive coverage of the Australian automotive industry.

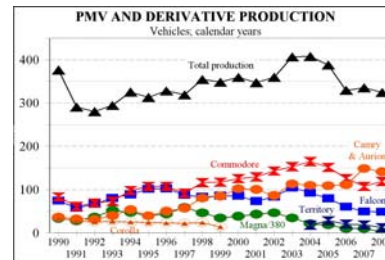
## KEY DATA

This chapter of the YEARBOOK presents a comprehensive collection of industry wide data and information with user friendly charts and tables.

For 2009 there are new data sets and charts adding to the already comprehensive collection. Coverage includes:

- a concise history of the Australian automotive industry and government policy
- key industry developments in 2008
- best car awards
- car price indexes, earnings and affordability
- vehicle sales by segment, marque and model, for cars, trucks, buses and motorcycles plus state totals
- car fuel consumption data

- industry production and employment
- vehicle finance data
- vehicle parc by age, scrappage and state
- automotive exports and imports including used vehicle imports



- motor vehicle usage
- industry data sources and key organisations.

## AUSTRALIAN CAR MANUFACTURERS

This chapter provides detailed profiles of the Australian car makers Ford, Holden, Toyota and recently withdrawn Mitsubishi.



Each of the five page profiles succinctly details:

- the history of the Australian company
- market strategies
- manufacturing operations and production
- exports and international activity
- market performance and models
- financial performance over two decades - all updated with the latest results.

## LIGHT VEHICLE IMPORTERS

The operations of the importers of more than 20 light vehicle marques are detailed in this chapter.

The profiles for each light vehicle importer comprise:

- company composition and ownership
- a brief history of Australian operations and the marques distributed
- market performance
- sales by model within the various vehicle segments
- financial performance.

## HEAVY COMMERCIAL VEHICLE ASSEMBLERS & IMPORTERS

This chapter offers profiles of heavy vehicles assemblers and importers which include:

- company financial performance
- heavy bus data
- profiles for the four assemblers - Iveco, Kenworth, Mack and Volvo - and 7 key importers.
- profiles on 7 key importers.

## AUSTRALIAN COMPONENT MANUFACTURERS

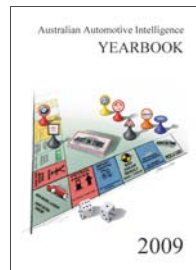
More than 90 Australian component manufacturers are profiled in this chapter - some new in 2009 - with information and data including:

- a brief history and recent developments
- company ownership and links to international affiliates
- operations including divisions and subsidiary companies



- major automotive products and key customers
- international and export activity
- financial performance.

- OVER 300 PAGES OF AUTOMOTIVE INDUSTRY DATA AND ANALYSIS
- OVER 100 IN-DEPTH PROFILES OF AUSTRALIAN CAR AND COMPONENT MANUFACTURERS, VEHICLE IMPORTERS AND DISTRIBUTORS
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