

AUSTRALIAN AUTOMOTIVE INTELLIGENCE REPORT

Automotive Probe Studies 1995 to 2007



AUSTRALIAN AUTOMOTIVE
INTELLIGENCE

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From time to time, AAI undertakes in depth studies of strategic issues of importance to the Australian automotive industry. These studies are included in AAI's two monthly REPORT and especially the June issue each year. Some study topics are either updated in subsequent issues of the REPORT or are absorbed into the Data Review section of each issue as new data becomes available.

Major studies and discussions

Ageing and attrition of key models: June 2007

This study examines the ageing of key models in the Australian market and projects their numbers 5 years ahead.

Dealer conglomerates - growth and profitability: June 2007

Following on from our study of June 2006, this investigation updates and expands the data and profiles of major dealer conglomerates, examining their growth and financial performance.

Earnings distribution and car prices: June 2007

This study also significantly updates previous work done by AAI and focuses on the important relationship between distribution of earnings and changing car prices.

Automotive trade exchange rate: June 2006

This study involves the construction of an automotive trade weighted index of the Australian dollar and a review of its impact on automotive trade.

Changing fuel types: June 2006

In this data study vehicle sales, parc numbers and vehicle usage by type of vehicle are collated based on the fuel used by those vehicles and trends in the data are examined.

The automotive aftermarket: June 2005

In this study we start with an overview of the aftermarket and the major participants. The latter part of the study focuses on the major distribution organisations, which typically extend from wholesale down to retail through company stores and/or franchisees.

Automotive industry R&D: December 2004

This is a brief study of research and development in the Australian automotive industry, which outlines the major government provisions for R&D, summarises key industry initiatives, and looks at the available data on automotive R&D.

Industry profitability 2003: December 2004

A brief coverage of profitability of the Australian automotive industry in 2003, using the first estimates from our light vehicle importers series and component manufacturer indexes.

CPI transport indexes: December 2004

This data study looks at the consumer price index transport group and the expenditure class indexes that make up the motoring sub-group, analysing which have contributed most to transport costs. Fuel price movements are looked at over a longer period to see if there are implications for vehicle sales in the current circumstances.

Holden and Ford: June 2004

This major study compares the market and financial performances of the two US owned companies that make light vehicles in Australia. Although history is important, the emphasis is on factors that give a guide to future performance.

French marques in Australia: December 2003

In this study a slightly different tack is taken from those of importers in previous issues by looking at all the marques sourced from France. These are brands that have operated in Australia since the early years of the automobile, and today all three remaining marques are attacking the Australian market with new vigour.

Regional vehicle sales: June 2003

Some of the key influences vehicle sales in regional areas of Australia are examined, including farm production, mining and tourism. Combined indexes are also provided.

Workplace agreements: June 2003

This study takes a practical look at a sample of workplace agreements currently operating at a number of automotive component manufacturers.

Suzuki in Australia: December 2002

Suzuki first entered the Australian market in 1973 and sales performance has been mixed. This has been caused by a varying array of factors, but the factory now controls distribution in all states except one.

HCV assemblers and importers: August 2002

A look at companies that assemble and import heavy commercial vehicles in Australia. The study considers the scope of operations and provides detailed data on financial performance of each company.

Automotive industry policy review: June 2002

This study looks at the development of the industry since the Button plan, with emphasis on developments since the last policy was announced in 1997 and the key policy issues to be addressed in the current review.

Nissan in Australia: December 2001

In this issue, Nissan Australia - currently the largest volume *pure* importer of motor vehicles into Australia - is studied. This study traces the Nissan performance in Australia, with emphasis on history, the market, and financial performance of the company since cessation of manufacture, as well as the factors which will determine its future performance.

Small business and new vehicle sales: August 2001

This study explores the relationship between the health of small business and sales of new vehicles. Firstly we have looked at the data that is available to measure small business activity, and then linked that data to sales in selected vehicle segments.

Australian car makers - a decade of change: June 2001

An overview of the changing performance of the Australian car makers from 1990 to 2000. The analysis includes consideration of sales, production, export and financial performance over the decade.

Transition in automotive policy provisions: February 2001

A brief look at changes to the automotive industry policy provisions arising from the introduction of the Automotive Competitiveness and Investments Scheme (ACIS) and the deadlines for returns in 2001.

Profit series for Australian light vehicle importers: February 2001

updated regularly in the Data Review section as data becomes available

In this study we put together new series to measure the sales and profitability of the importers of light vehicles into Australia.

Inchcape Motors in Australia: December 2000

A study of the performance of Inchcape Motors Australia, its subsidiary companies and the marques that the company distributes. A declining presence in distribution is leading to diversification of Inchcape Motors' activities, while performance of the marques vary considerably.

The internet and the automotive industry: June, August & December 2000

A study that looks at how the internet will affect the automotive industry. Business to business activities and the business to consumer aspects are examined. A checklist on automotive industry internet commerce is also provided.

Holden and General Motors in Australia: June 2000

A study of the performance of Holden and related General Motors companies in Australia through the 1980s and 1990s and looking forward at the strengths that Holden takes into the current decade along with the challenges it will face.

What affects luxury car sales: February 2000

A detailed analysis of variations in the share of car sales taken by the luxury sector of the market over the last two decades, and some likely key causes of those variations.

Mazda in Australia: December 1999

A study of Mazda in Australia, including company history, changing strategies and sales performance including segment data. Company financial performance is considered, including the impact of exchange rate variations, liabilities and inventories. Future prospects for Mazda are also discussed.

New car price shocks and used car values: August 1999

The approach of GST introduction has many participants in the automotive industry concerned about what the impact of lower taxes on new vehicles will be on used vehicle values. This study goes back to earlier price shocks to new cars to see what we can learn from previous experience.

The review of the motor vehicle standards Act: June 1999

A summary of the draft report of the review of the motor vehicle standards act incorporating:

- a condensed version of the overview and recommendations of the draft report
- some additional observations which are made in the report but not covered explicitly in the overview and recommendations
- data on used vehicle imports drawn from the report.

The overview and recommendations from the report form the framework of this study and the additional observations have been inserted at appropriate points.

Toyota in Australia: June 1999

A study of Toyota in Australia, examining the company's history, product line-up and sales by segment. Company financial performance is also examined.

Component maker profitability - a new index: June 1999

updated regularly in the Data Review section as data becomes available

A study drawing on financial reports to create automotive component sector indexes.

Used vehicle sales in Australia: February 1999 & December 1999

updated in the Data Review section of each issue

This study contains our first estimates of the size of the used vehicle market.

Honda in Australia: December 1998

A study of Honda in Australia including history, sales by segment and strategy pursued. Financial performance and future prospects are also considered.

Ford in Australia: June 1998

A study of Ford Australian operations since incorporation in 1925. Market performance is examined, as well as the importance of Falcon in total sales. Segment sales, the international context, company financial performance, capital expenditure, amortisation and other cost issues are also examined.

Financial performance - automotive financiers: June 1996

data updated quarterly in Data Review section

Consideration of a number of the finance companies which focus their lending towards motor vehicles.

Data Studies

International trade in used cars: June 2005

This study used new data to extend the perspective on international trade in used cars, from the perspective of Japanese exports and Australian and New Zealand imports.

Vehicle leasing: June 2005

2004 data from the Australian Fleet Lessors Association is used to complement the ABS data that we cover regularly.

Seasonal adjustment and GST: June 2003

A look at some of the problems in seasonally adjusting vehicle sales data as a result of the changeover to GST in 2000.

Donations to political parties: June 2003

monitored and updated occasionally in Data Review section

An examination of donations and other payments to political parties by companies and organisations with substantial involvement in the Australian automotive industry.

Motor vehicle theft: June 2003; updated quarterly

Drawing upon data from the National Motor Vehicle Theft Reduction Council, we look at theft and recovery rates including statistics by state.

Trading days and seasonal adjustment: December 1998 & June 2003

A description of the seasonal adjustment process, the purpose being to compare seasonally adjusted data with trading day data provided with the monthly VFACTS release to subscribers each month.

Motor vehicle usage: February 1997, October 2001 & June 2003

updated annually in the Data Review section as data becomes available

Studies based on Australian Bureau of Statistics data on the usage of motor vehicles, including average distance travelled by passenger motor vehicles in Australia as a whole and broken down by state. Fuel economy for passenger motor vehicles is also analysed.

Financing vehicle purchases: June 1995

updated quarterly in the Data Review section

A study of vehicle financing methods - lease, commercial, personal and operating lease. All financial data is sourced from the Australian Bureau of Statistics, Financial Survey Special Data Services.