

SENATE ECONOMICS REFERENCES COMMITTEE - Future of Australia's automotive industry
QUESTIONS ON NOTICE from R. Dudley, CEO AMIF 15 April 2015

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QUESTION:

Senator XENOPHON: Right. I think you referred to it, but you may want to take this on notice. For the purposes of this committee preparing its report, could you spell out the sort of support services and programs that are required to make this transition and to mesh more closely with that? I think that is quite important.

AMIF / MTAA RESPONSE

AMIF will be covering some of these issues and others in greater detail in its interim submission due 29 May 2015.

A revised ATS should be used to develop an overall industry-wide approach that results in an integrated program for future labour and skills projection to identify and securing the jobs of the future.

There needs to be a greater understanding by Government that the ATS should acknowledge and integrate activities during the transition phase of manufacturer plant closure towards the retail service repair, recycling (RS&R) and associated sector which will become the automotive industry in Australia.

Support for these sectors during a period of unprecedented structural adjustment is urgently required in areas not limited to but including:

- Greater financial support for all automotive sectors.
- More resources to properly coordinate skills improvement of affected workers.
- A more structured assistance plan
- Better allocation of funding to emerging industry outcomes i.e. end of life vehicle planning, new technology development, maintenance and repair.
- Employment subsidies within the industry to assist transitioning workers.
- Assisting the retail, service, and repair automotive industry cope with changes in the market caused by what will shortly become a 100% imported passenger vehicle market. The rate of import is already over 85% and very diverse. New technologies which are appearing daily in the market require new information, new training, new equipment and skills therefore retail auto business will need assistance to meet the demands of the recent industry Agreement on access to service and repair information and Codes under the agreement. The codes provide the start of the process that will we trust deliver a transition to a new regime of access to service and repair information. However there is a gap that many independent small business repairers will need to come up to speed with a rapidly changing environment.

There needs to be at the very least a quarantining of forecast allocations to the ATS and a redesign of the potential terms of reference without necessarily impacting support for remaining manufacturing operations or jeopardising new manufacturing options.

QUESTION:

ACTING CHAIR: I am wondering how that translates to employment. That is an unbelievable turnaround in 15 years. How has employment changed in that 15-year period? I know we are down to about 44,000 or something in the PMV sector. What was it 15 years ago, do you know?

AMIF / MTAA RESPONSE

Employment in the manufacturing sector of the auto industry in Australia peaked in 1973 at 100,000 persons. Since then the rate of production of vehicles and the number of employees has fluctuated from time to time but for most of the time has been on a steady decline to the point where in 2012 it was 50,000 persons.

The peak of Australian production of Personal Motor Vehicles (PMVs) occurred in 1987 when 86% of PMVs sold were manufactured in Australia. When light trucks and SUVs are included the Australian produced percentage reduces to 73% in 1987.

1987 was 28 years ago and before many Government auto industry reforms were introduced.

As a result of The Button Plan, automotive tariffs and quotas were reduced over time. By 1988 import tariffs had been reduced from 57.5% to 45% and quotas had been removed. The reduction in tariffs has continued ever since. Government policies are obviously one of the reasons for the change in employment. International market conditions are also an important contributor to change. The Australian new vehicle market is now fully integrated into the global market. It was not 15 plus years ago.

15 years ago in 1999 PMV imports were 286,000 out of a total of 547,000 vehicles sold or 52% and total auto manufacturing employment was 51,000 persons of which 17,000 were directly involved in Motor Vehicle Manufacturing.

By 2013 that number of imported PMVs had increased to 472,775 or 83% of PMV sales. Total employment was 50,000 of which 17,000 were in motor vehicle manufacturing.

Employment in motor vehicle manufacturing plants increased during the years 2000 to 2006 peaking at 27,000 persons but fell again to 17,000 in 2012. Keep in mind that in 1999 there were more participants and more plants operating building a greater range of models. In 2015 there are three plants and three models.

	<p>Australian vehicle manufacturers struggled to match consumer demand for smaller vehicles and competition from overseas is intense. Australia is one of the most open and attractive right hand drive markets in the world for automotive imports.</p> <p>One of the most powerful forces in reduction of Australian PMV manufacture is the global nature of the automotive manufacturing industry and oversupply of vehicles worldwide, which may be readily moved and sold in countries like Australia, that have embraced free trade.</p> <p>Barriers to entry are now almost non-existent and international trade in new vehicles is buoyant.</p> <p>Australia has become a popular destination for automotive goods manufactured in a wide range of countries. This outcome was made possible because of the diversification of global car market which is now very competitive. New entrants from China, India, Malaysia and others are seeking markets for their rapidly developing auto manufacturing capacities.</p> <p>Over the last ten years some older and very well developed auto manufacturers have re-entered the Australian market importing vehicles with success displacing Australian made products i.e.: Volkswagen, Jeep and Chrysler.</p> <p>Statistics provided here are sourced from the Australian Automotive Intelligence Yearbook of 2014. Published by Richard Johns and are included as attachments to this document for further reference.</p> <p><u>Attachments:</u> Sections Australian Automotive Intelligence Yearbook of 2014. Published by Richard Johns</p>
<p><i>Hansard Reference – Page 8</i></p> <p><i>ACTING CHAIR:</i> There has certainly been a reduction. I just do not think it has been that stark.</p> <p><i>Senator KIM CARR:</i> There have been huge productivity changes in the manufacturing sectors but also the tariff regime has changed dramatically and a number of other things—</p> <p><i>ACTING CHAIR:</i> Not in 15 years, though. There have been some tariff reductions, but the bigger ones happened in the 1990s.</p> <p><i>Mr Dudley:</i> I took your question to be specific on employment numbers. That I would have to take on notice.</p>	<p><u>AMIF / MTAA RESPONSE</u></p> <p>A very useful set of tables of employment numbers is found on pages 67, 68 and 69 of Automotive Industry Intelligence 2014.</p> <p><u>Attachments:</u> Sections Australian Automotive Intelligence Yearbook of 2014. Published by Richard Johns</p>

<p>ACTING CHAIR: Don't worry about it. I am sure I can get it elsewhere, but I thought you might know. I was just struck by that mix.</p> <p>Mr Dudley: The federation stands by that mix. It was like that 15 years ago and it has almost mirror reversed as a result of myriad changes.</p> <p>QUESTION/ON NOTICE:</p> <p>Mr Dudley: I took your question to be specific on employment numbers. That I would have to take on notice.</p>	
<p>Hansard Reference – Page 8</p> <p>Senator KIM CARR: But you do not have any manufacturing companies that you are aware of?</p> <p>Mr Dudley: No. I believe that a couple of my members, the state and territory associations, do have some members who are in that category. I can take on notice how many we actually have, but I am aware that we do have one or two vehicle or trailer manufacturers.</p> <p>Senator KIM CARR: Also after-market product manufacturers?</p> <p>Mr Dudley: Yes, we do. But so too does the Australian Automotive Aftermarket Association.</p> <p>Senator KIM CARR: There is no cross-over in membership?</p> <p>Mr Dudley: Yes, there is.</p> <p>QUESTION/ON NOTICE:</p> <p>I can take on notice how many we actually have, but I am aware that we do have one or two vehicle or trailer manufacturers.</p>	<p><u>AMIF /MTAA RESPONSE</u></p> <p>Some small business in the AMIF Federation are attached to and or actually engaged in the manufacture of automotive components, whole vehicles, bodies, parts, accessories or the modification of vehicles.</p> <p>For example new trucks are often specified by the customer for unique purposes. Bodies and equipment are built for that customer. A body and equipment will be manufactured according to the customer request.</p> <p>Accessories are in the same category. Trucking companies and transporters often specify a particular equipment like cranes, hoists, tow hitches, couplings etcetera, our members in the Commercial Vehicle Industry are often manufacturers and or importers of such items.</p> <p>The same comments apply to caravans and commercial trailers.</p> <p>There is also an active specialist and enthusiast vehicle industry manufacturing and or modifying vehicles for enthusiasts, racing and or recreation purposes.</p> <p><u>Attachments:</u> Sections from the 2014 Glasses Black and White data book.</p>
<p>Hansard Reference – Page 8</p> <p>Senator KIM CARR: I would appreciate your answer on how many of your members actually make things in this country. Are you seeking any changes to the ATS that affect your members? If so, what are they?</p> <p>Mr Dudley: The ATS was never destined for our members in the first place, but our commentary, as expressed in earlier submissions to other inquiries, still holds true, that is that there is going to continue to be a design element to manufacturing in this country, there will</p>	<p><u>AMIF /MTAA RESPONSE</u></p> <p>In the time available the following information has been collated. It should be noted that some States have not been able to respond and there are likely to be more members that fit into the manufacturing category.</p>

still be an engineering focus for manufacturing in this country. That was evidenced by two wholly Australian designed cars featuring at the Detroit motor show earlier this year. We also believe that in the spirit of the massive transformation that is occurring across the entire industry if the ATS were to be recalibrated issues such as training and skills development across the broader automotive industry and some of those areas should be looked at as part of that.

QUESTION:

Senator KIM CARR: Perhaps you want to take this on notice, because we have to prepare an interim report to the Senate on your suggestions about how the automotive transformation scheme, in your view, should be amended to facilitate the transition to a new automotive industry in this country. I take your point that your submission says that the automotive industry should be more broadly defined, and that traditionally we have spoken about the automotive industry as if it was only the firms registered on the ATS. Your view is that the industry is much bigger and includes many more people. In fact, you claim that 75 per cent of the industry is represented outside of the ATS. Is that the proposition you are putting?

Mr Dudley: That is the proposition.

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Senator KIM CARR: It is an important question to get to the bottom of. We can be precise about the number of firms that are registered under ATS. I do not know what the number is at the moment; it is 126 individual companies, or something of that type. It is said, on the basis of what we understand of how the industry operates, there are probably 1,000 companies associated with those companies, who supply them—tiers 2, 3, 4 and so on in the supply chain. Would you agree with that analysis?

Mr Dudley: I suggest that that is what we have heard as well, and what we—

Senator KIM CARR: But you do not represent any of those firms—the 2-, 3-, 4- and 5-tier firms.

QUESTION/ON NOTICE

Mr Dudley: I would have to take on notice as to whether they are. They could well be one of my members. I just do not have that information.

It has not been able to be determined in the time available whether some or any of these members are already captured under ATS Tiers.

Motor Traders Association of South Australia manufacturing members include, but not necessarily limited to:

- Mazda SA
- JG Shultz, a motor body builder
- Dekker Motor Body
- Lowe and Henessy Pty Ltd – A trailer Manufacturer.

Motor Traders Association of NSW manufacturing members include, but not necessarily limited to:

- Trailers Manufacturers
- Body Manufacturers
- Mainly heavy vehicle and number around 50 in NSW

Victorian Automobile Chamber of Commerce (VACC)

Commercial Vehicle Body Manufacturers Association Division members include, but not necessarily limited to:

Jeff Eirth Trucks
AJ & SM Petrie
Alltruck Bodies Pty Ltd
Ballarat Isuzu
CMV Truck & Bus Pty Ltd
Comtruk Pty Ltd
Cooks Body Works
CTE - Custom Transport Equipment
Freestones Transport Pty Ltd
Hercules Engineering Pty Ltd
Hume Highway Truck Sales (Aust) Pty Ltd
Lakes Diesel Sales & Service

	<p> Melbourne Fleet Maintenance Pty Ltd Norden Body Works Shepparton Motor Body Builders Pty Ltd Thackers Trucks & Engineering Topline Industries Pty Ltd TRJ Engineering Pty Ltd Trubody Industries Twin City Truck Centre V D C Vawdrey Australia Pty Ltd Vehicle Storage & Engineering Bartlett Transport Improvements C & S Norling CMV Truck & Bus Pty Ltd CMV Truck & Bus Pty Ltd CMV Truck & Bus Pty Ltd Fleet Parts & Equipment Pty Ltd Inter Continental Spares Pty Ltd Mc Connell Seats Australia Pty Ltd Midlands Truck Spares Pty Ltd Patterson Cheney Pty Ltd Pro Truck Services Rambler Concept Vehicles Road-Trans Engineering Pty Ltd Transit Engineering Pty Ltd </p> <p> Access to the ATS for vehicle businesses that manufacture or are proposing to R&D manufactured goods for the automotive industry should also be considered. </p>
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Automotive industry production and trade

This section looks at production of vehicles and their components in Australia, but does not extend to production of caravans, trailers and commercial vehicle body building.

As so often occurs there is much discontinuity in the data, which inhibits long term comparisons. However we have constructed a comprehensive vehicle production series for the 2nd half of the 20th century and up to 2013, which allows tracking of trends since 1950. This series is shown in the chart below and tabulated on page 69.

The chart shows:

- strong growth in Australian vehicle production from the 1950s, to a peak in the mid 1970s
- with a more open market plus policy encouraging rationalisation and specialisation by the Australian vehicle industry, a long decline to the early 1990s
- broadly some recovery to the late 2000s, particularly linked to export growth, although production slumped in 2009 with the weak local market for large cars and the impact of the GFC on export markets and has remained low since.

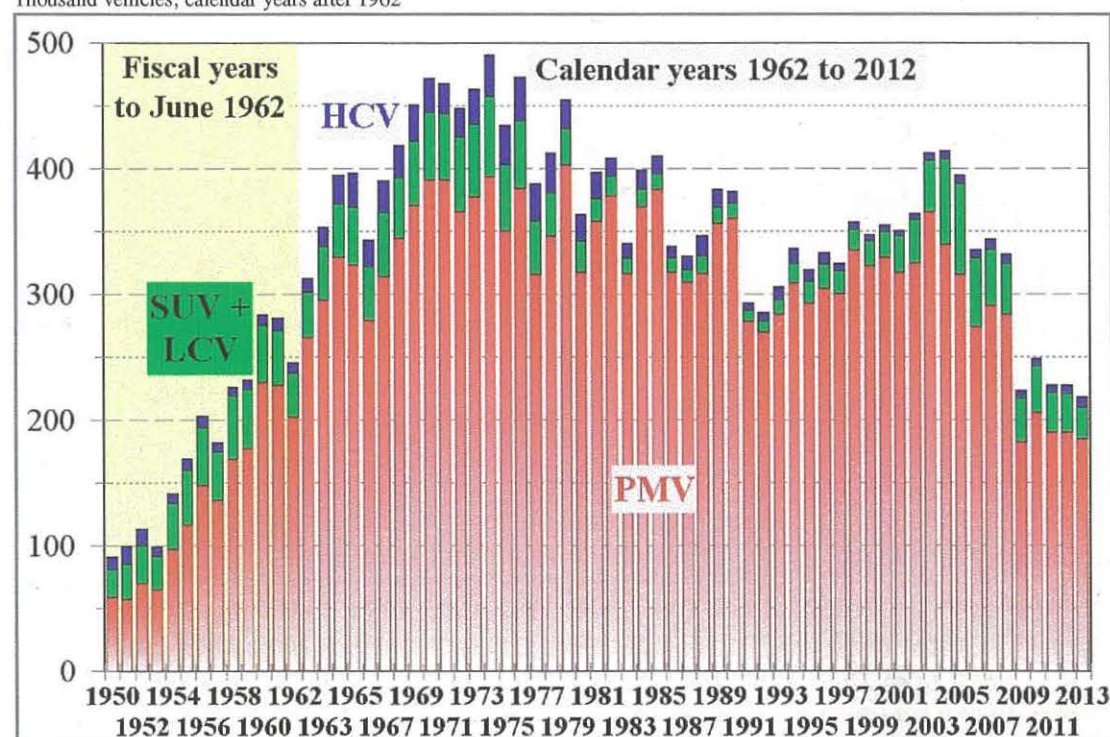
Volume data tends to understate the significance of the growth over the 1990s and most of the 2000s; rationalisation of the local industry removed lower value added vehicles - lower local content models and small cars - while exports added to production of higher value large cars. Holden partly reversed that trend in 2010 as it began assembly of the small PMV segment Cruze.

It is more difficult to measure the growth of the automotive component sector and of employment, because the available data is limited and some has significant discontinuities, but:

- the value of component production was rising up to mid last decade but fell back in the 2nd half of the decade and especially with the impact of the GFC
- although industry employment has been on a long decline, the strong growth in vehicle production up to the mid 2000s also temporarily reversed that trend, but it has fallen back since.

VEHICLE PRODUCTION AUSTRALIA

Thousand vehicles; calendar years after 1962



Automotive industry production and employment

It is difficult to get continuous and up to date, long term value of production and employment data for most industries, including the automotive industry. The data in the chart below and the table over the page is from 5 principal Australian Bureau of Statistics series.

The major breaks in consistency in the series occur:

- between 1968 and 1969 - earlier definitions included within the motor bodies etc classification much of what was later included in motor vehicle manufacturing
- from 2000 to 2001 the basis of the data changed from "manufacturing establishments" to "management units". This change added separate head offices, parts distribution etc, to the data and thus large increases for most of the 2001 data. "Sales and service income" also replaced turnover as the aggregate measure of activity
- in 2002 there were again changes in methodology, which would have raised sales and service income by about 5 percent in 2001 for both total manufacturing and for machinery and equipment manufacturing - of the latter, motor vehicle manufacturing represented more than half
- from 2007-08 to 2009-10, ABS released experimental data from modeling of ABS survey data and Australian Taxation Office Business Activity Statement data and similar methodology has been used for subsequent data.

The changes are many and substantial, including recently, and it is not practical to detail them. Data should therefore be treated as broad indicators of the change in industry size.

To allow a more valid comparison we have adjusted employment data in the chart below. 2001 has been scaled down using preceding ANZSIC data, while employment data for 2007-08 for the chart has been estimated using 2006-07 and 2008-09 employment as well as wage and salary data.

The data for ANZIC 231 used here does not include all production and employment which may be considered part of the automotive industry - for instance tyre and rubber component making is in the ANZSIC polymer product class.

Ignoring the jolt in 1968-69, the employment data for automotive industry manufacturing broadly shows:

- a rise from the late 1940s until the mid 1970s
- a long term decline from the mid 1970s
- relative stability through the 1990s after a sharp fall early
- generally higher employment during the last decade
- a slump in 2008-09 which has essentially continued up to 2011-12.

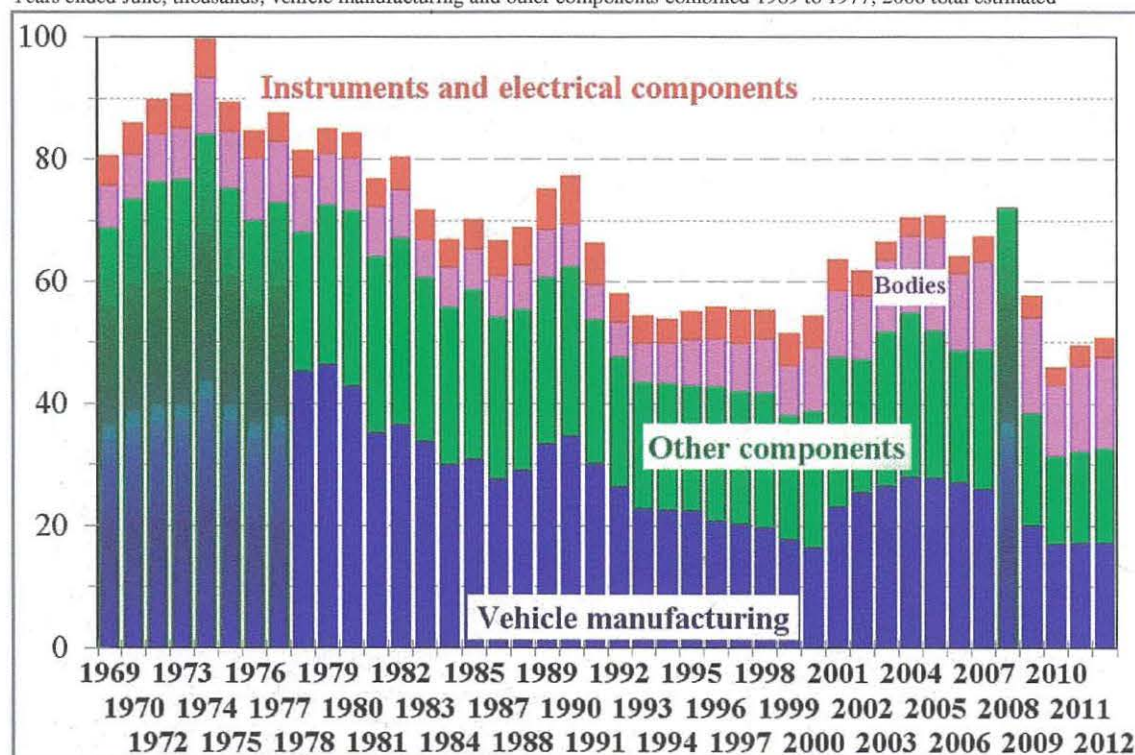
Cyclical variations are similar to vehicle sales although, in the 1990s, industry rationalisation tended to offset the recovery in domestic sales and increased exports.

Data on the value of output and turnover - as given in the table - is somewhat less enlightening over such a long period as inflation alone has multiplied monetary values many times.

Employment in motor bodies etc rose strongly last decade - partly because of caravans, but probably mostly because of bus bodies and larger articulated trucks and trailers.

EMPLOYMENT IN MOTOR VEHICLE & COMPONENT MANUFACTURING

Years ended June; thousands; vehicle manufacturing and other components combined 1969 to 1977; 2008 total estimated



The sources of the data in the chart and in the table at right are Australian Bureau of Statistics, *Manufacturing Industries, Australia* annual bulletins for Motor Vehicles and Cycles from 1949-50 to 1967-68 and is based on the Factory Classification (1945). Subsequent data is from ABS, *Manufacturing Industry*, cat. 8221.0 and *Experimental Estimates for the Manufacturing Industry*, cat. 8159.0, with 1969 to 1992 data from Industry Commission, *Manufacturing Industry Data*, 1995. Notes are continued below the table at right. 2001 and 2008 data has been adjusted and estimated respectively by AAI.

Automotive manufacturing employment and turnover

Year ended June	Automotive electrical and instrument mfg ANZSIC 2313		Automotive component mfg nec ANZSIC 2319		Motor accessories		Motor bodies, trailers, caravans ANZSIC 2312		Motor vehicle manufacturing ANZSIC 2311		TOTAL ANZSIC 231	
	Employment	Turnover AUD m.	Employment	Turnover AUD m.	Employment	Turnover AUD m.	Employment	Turnover AUD m.	Employment	Turnover AUD m.	Employment	Turnover AUD m.
1939					1,919	2	11,742	15	4,279	5	17,940	22
1946					3,935	6	10,682	16	4,077	8	18,694	30
1948					5,210	10	13,990	27	6,902	12	26,102	49
1949					5,531	12	14,982	33	9,066	16	29,579	61
1950					5,121	13	16,168	44	11,357	31	32,646	88
1951					5,568	9	17,708	60	13,714	53	36,990	123
1952					6,132	24	19,074	85	14,819	74	40,025	184
1953					5,727	22	18,840	94	13,183	75	37,750	192
1954					6,506	28	21,183	120	15,335	100	43,024	247
1955					8,258	38	23,352	141	16,778	103	48,388	282
1956					9,238	47	25,822	168	18,148	113	53,208	328
1957					9,634	51	25,460	153	16,908	103	52,002	307
1958					9,734	58	25,953	165	17,864	147	53,551	370
1959					9,804	61	25,882	169	18,670	165	54,356	395
1960					10,277	73	27,899	203	21,758	196	59,934	471
1961					13,854	97	29,210	225	22,155	212	65,219	535
1962					12,273	91	27,324	206	19,026	192	58,623	488
1963					16,081	123	30,948	281	22,693	236	69,722	640
1964					17,393	140	33,812	331	24,311	266	75,516	737
1965					19,178	165	37,513	359	25,229	271	81,920	795
1966					18,414	157	38,039	400	24,381	259	80,834	817
1967					19,113	179	38,202	408	24,807	281	82,122	868
1968					21,013	203	40,254	466	25,951	332	87,218	1,002
1969	4,894	45					6,984	89			80,626	1,520
1970	5,337	52					7,221	100			85,996	1,713
1972	5,535	64					7,801	120			89,641	1,947
1973	5,615	70					8,180	144			90,631	2,088
1974	6,260	88					9,251	196			99,663	2,351
1975	4,936	89					9,181	236			89,419	2,741
1976	4,430	95					10,083	305			84,604	3,083
1977	4,542	115					10,020	340			87,488	3,637
1978	4,188	120	22,645	679			9,059	331	45,458	2,587	81,350	3,717
1979	4,069	132	26,223	848			8,349	342	46,372	2,859	85,013	4,181
1980	4,269	164	28,821	1,104			8,396	375	42,910	3,257	84,396	4,900
1981	4,515	192	28,804	1,174			8,178	423	35,279	3,073	76,776	4,861
1982	5,405	241	30,703	1,366			7,650	437	36,593	3,795	80,351	5,839
1983	4,774	232	26,767	1,313			6,301	383	33,862	4,052	71,704	5,980
1984	4,500	239	25,800	1,426			6,500	430	30,000	4,131	66,800	6,227
1985	4,900	287	27,700	1,758			6,500	476	31,000	4,908	70,100	7,429
1987	5,800	391	26,600	1,937			6,600	545	27,700	5,460	66,700	8,332
1988	6,243	500	26,354	2,226			7,209	684	29,070	6,439	68,876	9,849
1989	6,700	647	27,300	2,496			7,700	731	33,400	7,536	75,100	11,410
1990	7,989	887	27,741	2,692			6,807	692	34,774	8,559	77,311	12,830
1991	6,739	803	23,588	2,568			5,683	601	30,228	8,373	66,238	12,345
1992	4,852	701	21,359	2,221			5,468	565	26,402	7,742	58,081	11,229
1993	4,627	716	20,688	2,265			6,234	697	22,896	7,118	54,445	10,796
1994	4,091	651	20,841	2,590			6,424	733	22,559	8,998	53,915	12,972
1995	4,684	798	20,538	2,841			7,345	943	22,477	9,658	55,044	14,240
1996	5,176	905	22,086	3,203			7,683	966	20,872	9,462	55,817	14,536
1997	5,420	955	21,868	3,254			7,614	1,003	20,330	10,026	55,232	15,238
1998	4,734	1,018	22,262	3,385			8,643	1,125	19,719	10,094	55,358	15,622
1999	5,189	1,163	20,322	3,461			8,207	1,282	17,802	10,795	51,520	16,701
2000	5,287	1,286	22,417	3,846			10,260	1,560	16,519	10,737	54,483	17,429
2001	5,085	1,613	24,424	4,395			10,900	1,786	23,243	16,323	63,652	24,117
2002	4,208	1,185	21,790	4,865			10,300	1,986	25,588	12,435	61,886	20,471
2003	2,986	810	25,222	6,232			11,600	2,109	26,606	12,589	66,414	21,740
2004	3,235	966	26,816	6,450			12,400	2,691	28,100	14,087	70,551	24,194
2005	3,504	926	24,200	6,913			15,300	3,086	27,800	14,432	70,804	25,357
2006	2,961	1,002	21,755	6,631			12,331	2,720	27,108	13,521	64,155	23,874
2007	4,116	1,462	22,789	6,074			14,344	3,168	26,135	14,023	67,384	24,727
2008		1,568		5,625				3,691		14,656		25,540
2009	3,613	1,346	18,278	5,128			15,539	3,575	20,189	12,441	57,619	22,490
2010	2,897	1,280	14,450	4,681			11,492	3,351	17,076	10,109	45,915	19,421
2011	3,262	1,256	14,898	4,462			13,993	3,568	17,295	10,897	49,448	20,183
2012	3,210	1,229	15,564	4,207			14,680	3,521	17,274	10,658	50,728	19,615

This latter data includes corresponding ASIC and ANZSIC classes prior to introduction of ANZSIC 2006. To 1989, employment data is average for year and from 1970 at end June. Data not collected in 1971 and 1986 and no employment data available for 2008. Definitions and terminology have changed several times, including in 2001, 2002 and 2007, resulting in inconsistencies in the data over time - care should therefore be taken in interpreting this data. ANZIC classes in titles are the current (2006) class numbers. 1938-39 data includes cycles.

Vehicle production

Year	PMV	LCVs & SUVs	HCV	TOTAL
1950	59,334	21,531	10,547	91,412
1951	57,352	28,256	14,250	99,858
1952	70,171	29,891	13,213	113,275
1953	65,324	26,224	7,585	99,133
1954	97,350	36,143	8,081	141,574
1955	117,204	42,785	9,436	169,425
1956	148,082	53,702	9,471	211,255
1957	136,573	45,790	7,096	189,459
1958	169,516	51,185	7,067	227,768
1959	177,845	47,859	7,561	233,265
1960	230,364	45,866	8,762	284,992
1961	228,191	42,718	9,826	280,735
1962	202,633	33,924	8,501	245,058
1962	266,214	36,000	10,635	312,849
1963	296,049	42,000	14,997	353,046
1964	329,433	43,000	22,514	394,947
1965	323,929	46,000	27,178	397,107
1966	279,681	42,304	21,008	342,993
1967	313,914	51,445	25,461	390,820
1968	345,060	48,281	25,163	418,504
1969	371,136	50,920	29,111	451,167
1970	391,949	52,769	27,729	472,447
1971	391,242	53,150	23,511	467,903
1972	365,844	59,713	22,719	448,276
1973	377,854	58,366	27,789	464,009
1974	393,741	64,153	33,213	491,107
1975	350,967	52,617	31,763	435,347
1976	385,031	53,624	34,390	473,045
1977	316,395	42,150	30,057	388,602
1978	346,489	34,324	32,026	412,839
1979	403,188	29,251	23,054	455,493
1980	318,048	24,551	21,434	364,033
1981	358,384	18,372	20,807	397,563
1982	378,978	15,431	13,857	408,266
1983	317,239	11,332	11,706	340,277
1984	370,393	13,304	15,832	399,529
1985	383,763	12,000	14,945	411,365
1986	317,690	11,000	9,765	338,107
1987	309,928	10,000	10,194	330,484
1988	317,289	13,000	16,316	347,046
1989	356,904	13,000	14,041	383,885
1990	360,918	12,000	9,283	381,780
1991	278,423	9,000	6,071	293,153
1992	270,170	9,000	6,306	284,631
1993	285,076	11,000	9,837	305,174
1994	309,512	15,000	12,104	335,757
1995	293,631	17,000	8,935	318,622
1996	304,741	19,000	9,365	332,486
1997	301,280	17,000	6,500	325,000
1998	335,653	16,000	6,500	358,500
1999	322,613	19,500	5,500	347,500
2000	329,726	20,500	5,000	355,500
2001	317,500	29,500	4,500	351,500
2002	326,000	33,500	5,000	364,500
2003	366,000	40,500	6,500	413,000
2004	339,500	68,000	7,000	414,500
2005	316,000	72,000	7,000	395,000
2006	275,000	54,000	7,000	336,000
2007	291,500	44,500	8,000	344,000
2008	284,500	40,000	7,500	332,000
2009	183,000	35,000	5,500	223,500
2010	207,000	36,000	6,500	249,500
2011	191,000	31,000	6,000	228,000
2012	190,500	30,500	7,000	228,000
2013	185,500	25,000	8,000	218,500

The table on the left like the chart on page 67 provides data on the Australian production of CBU vehicles, illustrating:

- the rapid growth in production through the 1950s and 1960s
- the decline from the mid 1970s to early 1990s
- a relatively strong revival after the mid 1990s
- the slump in production in 2009 as both domestic and export markets contracted, a degree of recovery in 2010 and falling back since.

Underlying these patterns have been some other trends:

- until the mid 1960s, typically up to a third of vehicles made in Australia were assembled from imported panels and this type of assembly largely disappeared during the 1970s
- production then concentrated on larger cars and subsequent growth largely came from exports, but with some major fluctuations
- except with the continuing Holden Commodore and Ford Falcon derivatives and Ford Territory, SUV and light commercial output was mostly assembly with low local content.

Production fell back quite markedly in 2006, after increasing strongly between 2002 and 2004, in the latter year to the highest level since 1979 both for estimated production of total vehicles as well as for light vehicles.

The weaker production in 2007 and 2008 was mostly the result of the domestic market for the locally made large cars contracting, after substantial rises in fuel prices and poor residual values for those cars in the used car market, as export production was approaching and then setting records in those years.

However the collapse of Holden export markets combined with the falling local sales of large cars in the last 5 years to reduce production markedly.

Given that low local content assembly had largely disappeared, large cars, light commercials and SUVs replaced many low valued cars in local production, the gains in the first half of the last decade are more impressive - the relatively small number of locally built heavy buses and trucks plus the 2011 commencement of Holden Cruze assembly are the exceptions.

Most of the data in the table at left to 2000 is based on ABS data and therefore differs to some degree from the totals of light vehicles shown in the table on the next page, which has been collated from other sources. The differences are relatively small in any one year and appear to arise from slightly different definitions and timing.

The data in this table has been compiled from:

- 1950 to 1962 - ABS, *Manufacturing Industries, Australia*, construction and assembly of motor bodies, excluding truck cabins; years ended June
- 1962 to 2000 - ABS, *Manufacturing Production, Australia*, cat 8363.0 and subsequent spreadsheet data; calendar years
- LCV and SUV data from 1962 to 1965 has been estimated from motor body construction and assembly data and heavy truck figures are the remainder of total vehicles for goods and materials
- LCV and SUV production from 1985 and HCV production from 1997 has been estimated by AAI from sales - HCV from 1985 to 1996 are residuals. The total from 1997 to 2001 includes these AAI estimates. 2001 to 2013 data is estimated from sales, *Australasian Bus and Coach* data, production data in Department of Industry, *Key Automotive Statistics* and data provided by the vehicle manufacturers. Estimates are rounded.

Some revision of earlier data can occur from year to year. 2013 data is preliminary.

Light vehicle production by model

Year	Ford Falcon	Ford Territory	Holden Commodore	Holden Vectra/Cruze	Mitsubishi Magna & 380	Toyota Avalon & Aurion	Toyota Camry	Toyota Corolla	Other	Total
1985	102,488		60,898		40,684		23,335	26,981	127,781	382,167
1986	91,856		54,456		43,127		22,551	28,870	76,429	317,289
1987	93,081		52,572		36,793		22,217	22,012	83,098	309,773
1988	90,652		52,879		40,483		29,986	25,190	92,055	331,245
1989	94,009		80,572		38,430		42,158	24,117	94,053	373,339
1990	74,576		78,657		33,663		36,680	34,558	118,221	376,355
1991	58,236		59,530		29,074		32,303	27,399	84,128	290,670
1992	67,160		74,309		36,715		31,520	25,908	44,923	280,535
1993	80,527		75,609		52,446		39,977	26,864	19,397	294,820
1994	88,949		98,063		47,856		53,943	25,333	11,696	325,840
1995	101,731		107,345		39,724		39,731	24,377		312,908
1996	102,735		108,006		43,916		50,396	23,198		328,251
1997	88,010		92,174		59,275		57,586	22,221		319,266
1998	83,436		116,556	3,368	46,506		80,609	23,968		354,443
1999	86,072		117,476	10,767	34,766		85,046	14,341		348,468
2000	85,829		125,600	7,598	38,451	14,339	87,916			359,733
2001	73,388		129,665		43,502	8,838	91,781			347,174
2002	83,607		143,161		46,437	7,756	78,790			359,751
2003	104,990		153,321		34,763	6,697	106,897			406,668
2004	92,747	18,266	165,252		21,418	4,990	104,864			407,537
2005	79,595	28,431	151,901		18,672	2,136	107,086			387,821
2006	60,847	20,623	125,855		10,493	7,991	103,619			329,428
2007	49,701	18,877	107,795		10,321	37,040	111,891			335,625
2008	49,200	12,528	119,246		2,294	26,723	114,693			324,684
2009	43,374	11,169	66,879		0	21,608	75,228			218,258
2010	44,157	13,201	66,061	84	0	23,469	95,969			242,941
2011	22,569	15,209	63,086	27,338	0	16,962	76,793			221,957
2012	20,944	16,756	51,610	31,562	0	15,118	86,264			222,254
2013	15,064	14,619	49,500	25,000	0	10,152	96,100			210,538

The data is from Industry Commission, *The Automotive Industry*, 1997 and Department of Industry, Innovation, Science, Research and Tertiary Education, *Key Automotive Statistics (KAS)*, 1999 to 2012, except as below. Derivatives include utes, vans, and long wheel based variants such as Holden Caprice.

2013 data is based on data from Toyota and Ford, with model figures for Holden estimated from sales data and FCAI total production and rounded - the sum of the models therefore differs slightly from the FCAI total for 2013 of 210,538. DIISR figures have traditionally differed slightly from the FCAI data and that collected from the companies and/or estimated by AAI.

Comparison of production figures from these sources with sales data suggested that certain published figures were inaccurate, notably the Holden Commodore figure for 1985 to 1993, the "other" figure for 1985 and Ford Falcon production for 1996. These figures have been revised using data supplied by the companies. Except for 1985 and 1996 the total figure has not been amended. The "other" figure is therefore a residual to 1993, and is affected by our changes to Commodore data, and should represent the volumes for vehicles removed from production prior to 1995. Amended data is shown in red.

Mitsubishi Magna data includes preceding Mitsubishi Sigma and Toyota Camry includes preceding Corona, series for which have been supplied by the companies. Holden Vectra was assembled in Australia 1998 to 2000, while Holden Cruze assembly commenced in late 2010.

It is not clear whether all early data includes CKD production - Commodore data includes CKDs, as does Toyota Camry and other data after 1993. Ford Falcon exports to mid 1991 were largely CKD but these may not be included. Some CKD may be missing from the total prior to 1993.

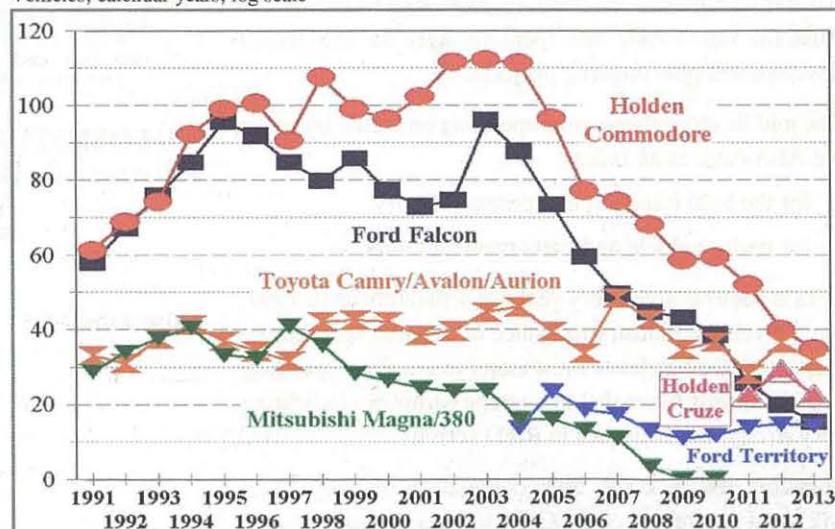
The chart opposite shows production of light vehicles by model, key features being:

- Holden Commodore line rising strongly to 2004, then falling with domestic sales and the loss of Pontiac exports
- Toyota Camry and Aurion production rising strongly to 2007, primarily for export, but lower in recent years
- Mitsubishi Magna/380 in decline before end of production in 2008
- Ford Falcon fluctuating then falling markedly since 2004; Territory fell back after a strong start but has partly recovered with its upgrades.

Production fell markedly in 2009, after record exports and has remained low.

PMV AND DERIVATIVE PRODUCTION

Vehicles; calendar years; log scale



SECTION TWELVE

Bus & Truck Manufacturers & Distributors



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Asia Motors (Australia) Pty Limited
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PO Box 363, Minto NSW 2566
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Director: Bruce W Campbell
Financial Controller
& Company Secretary: Lou Riccardi

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66 Canterbury Road, Bayswater Vic 3153
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www.daf.com.au

FORD

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1735 Sydney Road, Campbellfield Vic 3061
Tel: (03) 9359 8211 Fax: (03) 9359 8900
www.ford.com.au

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Imported by Ateco Automotive Pty Ltd
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Locked Bag 5018, Alexandria NSW 2015
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www.fotontrucks.com.au

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Service Manager: Tim Williams
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Refer to Mercedes Benz listing

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Tel: 1300 014 466
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Director & COO: Phil Taylor
Director IT, Engine & Part Operation: Peter Rutkis
General Manager Overseas Sales:
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MACK

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Manager Product Management and Promotion:
Gary Richards
Manager Human Resources: Kathy Sutherland
General Manager Retail Operations: Wayne Wallace

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www.mazda.com.au

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State Manager: Jarod Gieschen

SOUTH AUSTRALIA

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Senior Executive - Truck Group: Gary Wheatley
Freightliner Business Unit
Senior Manager - National Sales: Rod West
Mercedes-Benz Trucks Business Unit
Senior Manager - National Sales: Joachim Heinke
Fuso Business Unit
General Manager - National Sales: Richard Eyre
Mercedes-Benz Bus and Coach Business Unit
General Manager Mercedes-Benz Bus and Coach:
Justin Whitford
Mercedes-Benz Vans
General Manager - National Sales: Dianne Tarr

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Freightliner Business Unit
Senior Manager - National Sales: Rod West
Mercedes-Benz Trucks Business Unit
Senior Manager - National Sales: Joachim Heinke
Fuso Business Unit
General Manager - National Sales: Richard Eyre
Mercedes-Benz Bus and Coach Business Unit
General Manager Mercedes-Benz Bus and Coach:
Justin Whitford
Mercedes-Benz Vans
General Manager - National Sales: Dianne Tarr

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www.scania.com.au

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melbournebranch@scania.com.au
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National Manager Truck Division: Roger McCarthy
National Manager Bus Division: Trevor O'Brien

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Volvo Truck Australia
120 Hume Highway, Chullora NSW 2190
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www.man.com.au

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1 Strathvale Court, Caboolture Qld 4510
PO Box 929, Morayfield Qld 4510
Tel: (07) 5495 8277 Fax: (07) 5495 8286
sales@phoenixcaravans.com.au
www.phoenixcaravans.com.au

PIONEER CAMPER TRAILERS

57 Challenge Boulevard, Wangara WA 6065
PO Box 2067, Wangara BC WA 6947
Tel: (08) 9302 2500 Fax: (08) 9302 2400
info@pioneercampers.com
www.pioneercampers.com

REGAL CARAVANS

81 Yellowbox Drive, Craigieburn Vic 3064
Tel: (03) 9308 6688 Fax: (03) 9308 6689
sales@regalcaravans.com.au
www.regalcaravans.com.au

ROADMASTER CARAVANS

4/10 Dorset Street, Lonsdale SA 5160
Tel: (08) 8384 6011 Fax: (08) 8384 6187
sales@roadmastercaravans.com.au
www.roadmastercaravans.com.au

ROADSTAR CARAVANS

4-6 Lisa Place, Coolaroo Vic 3048
Tel: (03) 9301 8700
sales@roadstar.com.au
www.roadstar.com.au

ROMA CARAVANS**RETAIL**

18/70B Hume Highway, Campbellfield Vic 3061
Tel: (03) 9357 7440 Fax: (03) 9357 7445
www.romacaravans.com.au
info@romacaravans.com.au

HEAD OFFICE

17 Randor Street, Campbellfield Vic 3061
Tel: (03) 9357 0488

ROYAL FLAIR CARAVANS

26-28 Merola Way, Campbellfield Vic 3061
Tel: (03) 9357 8118 Fax: (03) 9357 8330
sales@royalflair.com.au
www.royalflair.com.au

SUNCAMPER CONVERSIONS

3/9 Sefton Road, Thornleigh NSW 2120
Tel: (02) 9484 3952 Fax: (02) 9980 9105
freedom@suncamper.com.au
www.suncamper.com.au

SUNLINER RECREATIONAL VEHICLES

415 Maroondah Highway, Ringwood Vic 3134
PO Box 554, Bayswater Vic 3153
Tel: (03) 9879 1776 Fax: (03) 9870 5139
www.sunliner.com.au
info@sunliner.com.au

SUPREME CARAVANS

Cnr Hume Hwy & Grasslands Ave,
Craigieburn Vic 3064
Tel: (03) 9357 3555 Fax: (03) 9357 3115
info@supremecaravans.com
www.supremecaravans.com.au

SWAGMAN MOTORHOMES

5 Progress Street, Yatala Qld 4207
Tel: (07) 3804 7711 Fax: (07) 3804 7726
info@swagman.com.au
www.swagman.com.au

TRACKABOUT

27 Moss Street, Slacks Creek Qld 4217
Tel: (07) 3208 1133 Fax: (07) 3208 1170
sales@trackabout.com.au
www.trackabout.com.au

TRACK TRAILER (T'VAN)

403 Dorset Road, Bayswater Vic 3153
Tel: (03) 8727 6100 Fax: (03) 8727 6120
sales@tracktrailer.com.au
www.tracktrailer.com.au

TRAKKA**SHOWROOM**

9 Beaumont Road, Mount Kuring-Gai NSW 2080
Tel: (02) 9472 9000 Fax: (02) 9472 9090
Tollfree: 1800 TRAKKA
trakka@trakka.com.au
www.trakka.com

TRAK MASTER

29-31 Waldheim Road, Bayswater Vic 3153
Tel: (03) 9720 0822
Toll Free: 1800 809 194
trakmaster@trakmaster.com.au
www.trakmaster.com.au

TRAVELLER

134 Metrolink Circuit, Campbellfield Vic 3061
Tel: (03) 9303 7499 Fax: (03) 8339 0738
infor@travellercaravans.com.au
www.travellercaravans.com.au

TRAYON

1/4 Endeavour Drive, Kunda Park Qld 4556
Tel: (07) 5476 5355 Fax: (07) 5476 7222
mail@trayon.com
www.trayon.com

ULTIMATE CAMPERS

39-41 Shelley Road, Moruya NSW 2537
 Tel: (02) 4474 4410 Fax: (02) 4474 4710
info@ultimatecampers.com.au
www.ultimateoffroadcampers.com.au

WINDSOR CARAVANS

Tel: (08) 9352 0900
sales@windsorcaravans.com.au
www.windsorcaravans.com.au

Boating Industry Associations

NEW SOUTH WALES

Boating Industry Association of NSW Ltd
 53 Hume Street, Crows Nest NSW 2065
 Tel: (02) 9438 2077 Fax: (02) 9439 3983
www.bia.org.au

QUEENSLAND

Marine Queensland
 6 Overend Street, East Brisbane Qld 4169
 Tel: (07) 3240 0170 Fax: (07) 3891 5293
www.marineqld.com.au

SOUTH AUSTRALIA

Boating Industry Association of SA Inc.
 300 Morphett Street, Adelaide SA 5000
 Tel: (08) 8212 6000 Fax: (08) 8410 0688
info@boatingsa.com.au
www.boatingsa.com.au

TASMANIA

Refer to Boating Industry Association of Vic Ltd

VICTORIA

Boating Industry Association of Vic Ltd
 24 York Street, South Melbourne Vic 3205
 Tel: (03) 8696 5600 Fax: (03) 8696 5334
www.biavic.com.au

WESTERN AUSTRALIA

Boating Industry Association of WA Inc.
 Unit 3, 266 Stirling Street, Perth WA 6000
 PO Box 850, Inglewood WA 9632
 Tel: (08) 9227 7899 Fax: (08) 9227 6655
www.biawa.asn.au

Marine Registration Authorities

NEW SOUTH WALES

Waterways Authority of NSW
 33 James Craig Road, Rozelle NSW 2039
 Locked Bag 5100, Camperdown NSW 1450
 Tel: (02) 9563 8511 Fax: (02) 9563 8522
www.maritime.nsw.gov.au
www.waterways.nsw.gov.au

NORTHERN TERRITORY

Department of Transport and Works
 Marine Branch
 PO Box 2520, Darwin NT 0801
 Tel: (08) 8999 5285 Fax: (08) 8999 5300
 Enquiries only - registration not required for
 pleasure craft in Northern Territory.

TASMANIA

Marine and Safety Tasmania
 5 Franklin Wharf, Hobart TAS 7000
 GPO Box 607, Hobart Tas 7001
 Tel: 1300 135 513 Fax: (03) 6233 5662
www.mast.tas.gov.au

QUEENSLAND

Maritime Safety Queensland
 Tel: 13 74 68 or 13 23 80
 Fax: (07) 3253 4359
www.msq.qld.gov.au

SOUTH AUSTRALIA

Transport SA - Marine Group
 PO Box 205, Port Adelaide SA 5015
 Tel: (08) 8347 5001 Fax: (08) 8347 5077
www.marine.transport.sa.gov.au

VICTORIA

Vic Roads
 GPO Box 1644N, Melbourne Vic 3001
 Tel: 13 1171 (Victoria) or 1800 814 762 (National)
 Fax: (03) 9854 1800
www.vicroads.vic.gov.au

WESTERN AUSTRALIA

Department for Planning & Infrastructure
 1 Essex Street, Fremantle WA 6160
 PO Box 402, Fremantle WA 6959
 Tel: (08) 9216 8999 Fax: (08) 9216 8977
www.transport.wa.gov.au/maritime

Boat Manufacturers

ARVOR

Unit 26, 17-21 Bowden Street,
Alexandria NSW 2015
Tel: (02) 9319 5222 Fax: (02) 9319 5561

BAR CRUSHER

5 Quality Drive, Dandenong South Vic 3175
Tel: (03) 9792 2999 Fax: (03) 9792 2998
www.barcruiser.com.au

BAYLINER

Avante Marine Group
210-212 Silverwater Road, Silverwater NSW 2128
Tel: (02) 9737 0727 Fax: (02) 9737 0698
www.bayliner.com.au

BERMUDA

Mercury Marine Pty Ltd
132 Frankston Road, Dandenong Vic 3175
Tel: (03) 9791 5822 Fax: (03) 9706 8038
www.mercurymarine.com.au

BERTRAM

Eagle Yachts Pty Ltd
Level 5, 181 St Georges Terrace, Perth WA 6000
Tel: (08) 9429 3480 Fax: (08) 9429 3445
www.eagleyachts.com.au

BLACKWATCH BOATS

92 Pacific Highway, Kingscliff NSW 2487
PO Box 149, Kingscliff NSW 2487
Tel: (02) 6676 6512 Fax: (02) 6676 6514
www.blackwatch.com.au

BLUE FIN

Blue Fin Boats Pty Ltd
26 Export Drive, Ernest Old 4214
Tel: (07) 5571 5277 Fax: (07) 5571 5288
www.bluefinboats.com.au

BOSTON WHALER

Sea Ray Australia
Marina Mirage, Sea World Drive,
Main Beach Qld 4217
Tel: (07) 5591 7032 Fax: (07) 5577 8554
www.searay.com.au

BROOKER

Brooker Marine Products Pty Ltd
188 Silverwater Road, Silverwater NSW 2128
PO Box 116, Ermington NSW 1700
Tel: (02) 9748 2133 Fax: (02) 9748 2296
www.brookermarine.com.au

CARIBBEAN

International Marine Pty Ltd
1278 Ferntree Gully Road, Scoresby Vic 3179
Tel: (03) 9763 7233 Fax: (03) 9764 1441
www.caribbeanboats.com

CLASSIQUE

Bendigo Ski Boat Centre
146 Murphy Street, Bendigo Vic 3550
Tel: (03) 5441 4488 Fax: (03) 5444 1799
www.classiqueskiboats.com.au

CONCEPT

Concept Sports Boats Pty Ltd
10 Kerrie Road, Riddles Creek Vic 3431
Tel: (03) 5428 6928 Fax: (03) 5428 6929

CONNELLY CRAFT

Connelly Craft Pty Ltd
Unit 1/915 Old Northern Road, Dural NSW 2158
Tel: (02) 4572 3112

COX CRAFT

Cox Craft Fibreglass Boats
7/219 Brisbane Road, Labrador Qld 4215
Mob: 0418 781 567 Fax: (07) 5534 2990
www.coxcraft.com.au

CROWNLIN

Vail Imports Pty Ltd
23 Norwood Street, Flemington Vic 3031
Tel: (03) 9411 2133
www.crownline.com

CRUISE CRAFT

Cruisecraft Boats Pty Ltd
1308 Lytton Road, Hemmant Qld 4174
Tel: (07) 3390 4877 Fax: (07) 3390 5756
www.cruisecraft.com.au

EDENCRAFT

Edencraft Boats Pty Ltd
Shed 10, 215 Brisbane Road,
Biggera Waters Qld 4216
Tel: (07) 5529 3955 Fax: (07) 5529 3086
www.edencraft.com.au

EVOLUTION

PM Marine Manufacturing
www.pmmarine.com.au

EXCALIBUR

Excalibur Boats Pty Ltd
35 Pemberton Street, Botany NSW 2019
Tel: (02) 9666 1696 Fax: (02) 9666 1796
www.excaliburboats.com

EXTREME SKI BOATS

73a O'Sullivan's Beach Road, Lonsdale SA 5160
Tel: (08) 8384 6268 Fax: (08) 8384 6100
www.extremeskiboats.com.au

FISHER

Fisher Boats Pty Ltd
1/11 Armitage Street, Bribie Island Qld 4507
Tel: (07) 3408 0722 Fax: (07) 3408 0700
www.fisherboats.com.au

FORCE

Force Sports Boats
Tel: (02) 4575 4038 Fax: (02) 4575 5284
sales@forceboats.com
www.forceboats.com

GILFLITE

Gilflite Ski Boats
58 Vinter Avenue, Croydon Vic 3136
Tel: (03) 9725 0011 Fax: (03) 9725 2835

HAINES HUNTER

56 East Derrimut Crescent, Derrimut Vic 3030
Tel: (03) 9394 1540 Fax: (03) 9394 1541
www.haineshunter.com.au

HAINES SIGNATURE

Haines Marine Industries
140 Viking Drive, Wacol Qld 4076
Tel: (07) 3271 4400 Fax: (07) 3271 4054
www.signatureboats.com

HALLETT

413 Dorset Road, Boronia Vic 3155
Tel: (03) 9720 9993 Fax: (03) 9720 7277
www.hallettaustralia.com.au

HOOKER

HookerBoats
31 Muir Street, Bungalow Qld 4870
Tel: (07) 4041 7171 Fax: (07) 4041 7172
www.hookerboats.com

HORIZON

Horizon Aluminium Pty Ltd
2 Queensbury Avenue, Currumbin Waters Qld 4223
Tel: (07) 5598 1033 Fax: (07) 5598 1599

HUNTER MARINE

21-25 Nyah Road, Swan Hill Vic 3585
Tel: (03) 5032 2320 Fax: (03) 5032 1949

KEVLACAT AUSTRALIA

12 Main Drive, Warana Qld 4575
Tel: (07) 5493 3799 Fax: (07) 5493 3168

KING FISHER

King Fisher Boats
43 Slater Parade, East Keilor Vic 3033
Tel: (03) 9336 1595

LEWIS

Lewis Ski Boats Pty Ltd
5-7 Craftsman Avenue, Berkeley Vale NSW 2261
Tel: (02) 4388 5671 Fax: (02) 4389 3050
www.lewisboats.com.au

MAC

Mac Boats Australia
1710 Pittwater Road, Bayview NSW 2104
Tel: (02) 9997 8999 Fax: (02) 9999 4770
www.macboats.com.au

MAKOCRAFT

8 Industrial Avenue, Molendinar Qld 4214
Tel: (07) 5564 7712 Fax: (07) 5564 7742
www.makocraft.com.au

MALIBU

Malibu Boats Pty Ltd
813 Hope Court, Albury NSW 2640
Tel: (02) 6040 1174 Fax: (02) 6040 4656
www.malibuboots.com

MARITIMO

Lot 6, John Lund Drive
210-212 Silverwater Road,
Hope Island Qld 4212
Tel: (07) 5530 1477 Fax: (07) 5530 1350
www.maritimo.com.au

MARKHAM

Markham Marine
46 Uralla Road, Port Macquarie NSW 2444
Tel: (02) 6581 1034 Fax: (02) 6581 0275
www.markhammarine.com.au

MARLIN BROADBILL (PELAGIAN)

Mariner, The Riviera Group
50 Waterway Drive, Coomera Qld 4209
Tel: (07) 5502 5555 Fax: (07) 5502 5599
www.marinercruisers.com.au

MIRAGE SPORTS BOATS

1 Stanley Street, Peakhurst NSW 2210
Tel: (02) 9584 1311
mirageboats@bigpond.com

MUSTANG

Lot 6, John Lund Drive
210-212 Silverwater Road,
Hope Island Qld 4212
Tel: (07) 5530 1477 Fax: (07) 5530 1350
www.maritimo.com.au

MUSTANG PLEASURE BOATS DIVISION

56-58 Sickie Avenue, Hope Island Qld 4212
Tel: (07) 5510 8888 Fax: (07) 5510 8889
www.mustangboats.com.au

NAUTIQUES

Haines Marine Industries Pty Ltd
140 Viking Drive, Wacol Qld 4300
Tel: (07) 3271 4400 Fax: (07) 3171 4054
www.nautiques.com

NOBLE

Noble Engineering Pty Ltd
11 Duntroon Street, Brendale Qld 4500
Tel: (07) 3205 1844 Fax: (07) 3881 2074
www.nobleengineering.com.au

NOOSA CAT

Noosa Cat Australia Pty Ltd
6 Production Street, Noosaville Qld 4566
Tel: (07) 5449 8888 Fax: (07) 5449 9480
www.noosacat.com.au

POLYCRAFT

Polycraft Industries Pty Ltd
89 Childers Road, Bundaberg Qld 4670
Tel: (07) 4155 2457 Fax: (07) 4155 2088
www.polycraft.com.au

POWERCAT

Powercat Marine Australia Pty Ltd
14 Roseby Road, Caboolture Qld 4510
Tel: (07) 5428 0043 Fax: (07) 5428 1444
www.powercatmarine.com.au

QUICKSILVER INFLATABLES

Mercury Marine Pty Ltd
132 Frankston Road, Dandenong Vic 3175
Tel: (03) 9791 5822 Fax: (03) 9706 8038
www.mercurymarine.com.au

QUINTREX

Telewater Pty Ltd
53 Waterway Drive, Coomera Qld 4209
Tel: (07) 5585 9805 Fax: (07) 5585 9811
www.quintrex.com.au

RENEGADE

Renegade Boats Pty Ltd
195-197 Port Hacking Road, Miranda NSW 2228
Tel: (02) 9544 7734 Fax: (02) 9544 7439

REVIVAL

Samcat Pty Ltd
163 Canterbury Road, Kilsyth Vic 3137
Tel: (03) 9761 4914 Fax: (03) 9761 4211
www.revivalboats.com.au

RIVIERA

The Riviera Group
50 Waterways Drive, Coomera Qld 4209
Tel: (07) 5502 5555 Fax: (07) 5502 5599
www.riviera.com.au

ROLCO

Rolco Boats
15 Foden Avenue, Somerton Vic 3062
Mob: 0428 627 463 Fax: (07) 5502 5599
www.rolcoboats.com.au

SALEM

Salem Ski Boats
240 Moorabbee Road, Knowsley Vic 3551
Tel/Fax: (03) 5439 1340
www.salemskiboats.com.au

SAVAGE

Telwater Pty Ltd
53 Waterway Drive, Coomera Qld 4209
Tel: (07) 5585 9805 Fax: (07) 5585 9811
www.savageboats.com

SEA JAY ALUMINIUM BOATS

2 Maddison Court, Bundaberg Qld 4670
Tel: (07) 4152 2111 Fax: (07) 4153 5075
www.seajayboats.com.au

SEA-AL

Brooker Marine Products Pty Ltd
188 Silverwater Road, Silverwater NSW 2128
Tel: (02) 9748 2133 Fax: (02) 9748 2296
www.brookermarine.com.au

SEAFARER

Haines Marine Group
140 Viking Drive, Wacol Qld 4076
Tel: (07) 3271 4400 Fax: (07) 3271 4054
www.seafarerboats.com.au

SEA QUEST

Sea Quest Pleasure Boats Pty Ltd
36 Attwell Street, Landsdale WA 6065
Tel: (08) 9302 4500 Fax: (08) 9302 4511
www.sea-quest.com.au
www.razerline.com

SEA RAY

Mercury Marine
132 Frankston Road, Dandenong Vic 3175
Tel: (03) 9791 5822 Fax: (03) 9706 7228
www.international.searay.com

SKICRAFT

18 Edelmaier Street, Bayswater Vic 3153
Tel: (03) 9729 3499 Fax: (03) 9729 5086
www.skicraft.com.au

SLEEKLINE**FACTORY:**

Sleekline Ski Boats
Factory 2, 26 Kyabram Street,
Coolaroo Vic 3048
Tel: (03) 9302 2173

SALES:

Sleekline Ski Boat Marine
74 Hume Highway, Somerton Vic 3062
Tel: (03) 9308 6399 Fax: (03) 9308 6377
www.sleeklineskiboats.com.au

SPORTSCRAFT

Pacific Marine
8 Tapleys Hill Road, Royal Park SA 5014
Tel: (08) 8444 2444 Fax: (08) 8444 2448
www.pacificmarine.com.au

STACER

Telewater Pty Ltd
53 Waterway Drive, Coomera Qld 4209
Tel: (07) 5585 9805 Fax: (07) 5585 9811
www.stacer.com.au

STEBER

Stebercraft Pty Ltd
6 Elizabeth Avenue, Taree NSW 2430
Tel: (02) 6552 2577 Fax: (02) 6551 0344

STEJCRAFT

Stejcraft Boats Pty Ltd
24 Maroondah Highway, Ringwood Vic 3134
Tel: (03) 9879 2044 Fax: (03) 9879 5225

STESSL

C & S Marinecraft
56-58 Sickle Avenue, Hope Island Qld 4212
Tel: (07) 3255 6525 Fax: (07) 3277 1211
www.stessl.com.au

STINGRAY BOATS AUSTRALIA

74-76 Williams Road, Dandenong South Vic 3195
Tel: (03) 9773 5633
Mobile: 0419 307 968
stingrayptyltd@bigpond.com.au

STREAKER

L & P Savage Bros Pty Ltd
461 Mountain Highway, Bayswater Vic 3153
Tel: (03) 9729 8288 Fax: (03) 9720 4213
www.streakerboats.com.au

SWIFT CRAFT

Foothills Marine Pty Ltd
1716 Albany Highway, Kenwick WA 6107
Tel: (08) 9821 1911

TRAILCRAFT

99 Quill Way, Henderson WA 6166
Tel: (08) 9437 8000 Fax: (08) 9437 8008
www.trailcraft.com.au

ULTIMATE

Maverick Boats
Theiss Road, Corowa NSW 2646
Tel: (02) 6033 3222 Fax: (02) 6033 4488
www.maverickboats.com.au

VISION

Vision Boats Australia Pty Ltd
455 The Boulevarde, Kirawee NSW 2232
Tel/Fax: (02) 9545 0388
www.visionboats.com.au

WAHOO BOATS

Roy Jarvis Marine
Horizon Shores Marina,
Cabbage Tree Point Road,
Woongoolba Qld 4217
Tel: (07) 5546 2177 Fax: (07) 5546 2111
www.wahooboats.com.au

WELLCRAFT (FIBREGLASS)

Chapman Marine
Shop 61, The Quayside,
Birkenhead Point Marina, Roseby Street,
Drummoyne NSW 2047
Tel: (02) 9719 8188 Fax: (02) 9719 8270

WHITTLEY

Whittley Marine Industries Pty Ltd
National Business Park
36-52 National Boulevard, Campbellfield Vic 3061
Tel: (03) 9358 9600 Fax: (03) 9358 9688
www.whittley.com.au

YELLOWFIN BOATS

Telwater
53 Waterway Drive, Coomera Qld 4209
Tel: (07) 5585 9805 Fax: (07) 5585 9811
www.yellowfin.com.au

ZODIAC INFLATABLES

1/23 Rowood Road, Prospect NSW 2148
Tel: (02) 9896 5755 Fax: (02) 9896 5766
www.zodiac.com.au

Marine Motor Manufacturers

EVINRUDE

BRP Australia
56 Canterbury Road, Bankstown NSW 2200
Tel: (02) 9794 6600 Fax: (02) 9794 6697
www.evinrude.com

FORCE

(Parts & Warranty only)
Mercury Marine Pty Ltd
132 Frankston Road, Dandenong Vic 3175
Tel: (03) 9791 5822 Fax: (03) 9791 8083

HONDA

Honda Australia MPE Pty Ltd
1954-1956 Hume Highway,
Campbellfield Vic 3061
Tel: (03) 9720 1111 Fax: (03) 9270 1133
www.hondampe.com.au

MAN MARINE DIESELS

Seapower Australia Pty Ltd
284 South Terrace, South Fremantle WA 6162
Tel: (08) 9335 9777 Fax: (08) 9335 3233
www.manengines.com.au

MARINER

Mercury Marine Pty Ltd
132 Frankston Road, Dandenong Vic 3175
Tel: (03) 9791 5822 or 1800 987 323 (National)
Fax: (03) 9706 7228
www.mercurymarine.com.au

MERCURISER

Mercury Marine Pty Ltd
132 Frankston Road, Dandenong Vic 3175
Tel: (03) 9791 5822 or 1800 987 323 (National)
Fax: (03) 9706 7228

MERCURY

Mercury Marine Pty Ltd
132 Frankston Road, Dandenong Vic 3175
Tel: (03) 9791 5822 Fax: (03) 9706 7228
www.mercurymarine.com.au

MINN KOTA

Bob Littler Agencies
Unit 2, 2 Picken Street, Silverwater NSW 2128
Tel: (02) 9648 6606 Fax: (02) 9648 6667
www.bla.com.au

SUZUKI

Haines Suzuki Marine Pty Ltd
140 Viking Drive, Wacol Qld 4076
Tel: (07) 3271 4400 Fax: (07) 3271 4054
www.hainessuzukimarine.com.au

TOHATSU

Lakeside Marine Pty Ltd
19 Arizona Road, Charmhaven NSW 2263
Tel: (02) 4392 6110 Fax: (02) 4392 1587
www.tohatsu.com

VOLVO PENTA

Eastern Engine Pty Ltd
17 Archimedes Place, Murarrie Qld 4172
Tel: (07) 3902 5444 Fax: (07) 3902 5499
www.volvopenta.com.au

YAMAHA

Yamaha Motor Australia Pty Ltd
97 Trade Street, Lytton Qld 4178
Tel: (07) 3906 7000 Fax: (07) 3906 7099
www.yamaha-motor.com.au/marine

YANMAR

Power Equipment Pty Ltd
Unit 5, Scoresby Industrial Park,
Janine Street, Scoresby Vic 3179
Tel: (03) 9764 0711 Fax: (03) 9764 0678
www.yanmar.com.au

Marine Trailer Manufacturers

AUSTRALIAN TRAILERS

12-14 Jappady Street, Mordialloc Vic 3195
Tel: (03) 9580 6558 Fax: (03) 9587 4296

BELCO

248 Leitchs Road, Brendale Qld 4500
Tel: (07) 3205 7955
www.belcocustomtrailers.com.au
Boeing Trailers

BROOKER

Brooker Marine Trailers
188 Silverwater Road, Silverwater NSW 2128
Tel: (02) 9748 2133 Fax: (02) 9748 2296
www.brookermarine.com.au

DUNBIER

Dunbier Marine Products Pty Ltd
136-164 Boundary Road, Braeside Vic 3195
Tel: (03) 9580 2455 Fax: (03) 9587 3374
www.dunbiermarine.com

DURALUM

Factory 4, 82 Brunel Road, Seaford Vic 3198
Tel: 1800 892 453 Fax: (03) 9848 5837

EASYTOW

Easytow Boat Trailers
Kyneton Road, Heathcote Vic 3523
Tel: (03) 5433 2461 Fax: (03) 5433 3488

FELK

Felk Industries
54 Medcalf Street, Warners Bay NSW 2282
Tel: (02) 4954 6955 Fax: (02) 4954 6070
femail@ozemail.com.au

MACKAY

Mackay Multi-Link Pty Ltd
17-19 Ashley Park Drive, Chelsea Heights Vic 3196
Tel: (03) 9772 6166 Fax: (03) 9772 6522
Toll Free: 1800 622 529
www.mackaytrailers.com

REDCO/TINKA

Mayfairs 2000
25 Jijaws Street, Summer Park Qld 4074
Tel: (07) 3279 7747 Fax: (07) 3279 7746

SEALINK

Special Trailers
25 Kremzow Road, Brendale Qld 4500
Tel: (07) 3881 3568 Fax: (07) 3881 3569

PWC Manufacturers

HONDA

Honda Australia MPE Pty Ltd
1954-1956 Hume Highway, Campbellfield Vic 3061
Tel: (03) 9720 1111 Fax: (03) 9270 1133
www.hondampe.com.au

KAWASAKI

Kawasaki Motors Pty Ltd
Unit Q, 10-16 South Street, Rydalmere NSW 2116
Tel: (02) 9684 2585 Fax: (02) 9684 4580
www.kawasaki.com.au

SEA DOO

BRP Australia Pty Ltd
56 Canterbury Road, Bankstown NSW 2200
Tel: (02) 9794 6600 Fax: (02) 9794 6697
www.seadoo.com

YAMAHA

Yamaha Motor Australia Pty Ltd
97 Trade Street, Lytton Qld 4178
Tel: (07) 3906 7000 Fax: (07) 3906 7099
www.yamaha-motor.com.au/marine

SECTION FOURTEEN

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Tel: (03) 9793 1066 Fax: (03) 9794 5840
conversion@norden.com.au
www.norden.com.au

N & J MOTOR BODY BUILDERS

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Tel: (02) 9756 2727 Fax: (02) 9756 2728

OSBORNE MOTOR BODIES

78 Grey Street, Bassendean WA 6054
Tel: (08) 9377 2400 Fax: (08) 9377 2311
enquiries@osbornemotorbodies.com.au
www.osbornemotorbodies.com.au

PANEL VAN CONVERSIONS

118 Ballandella Road, Pendle Hill NSW 2145
Tel: (02) 9631 2900 Fax: (02) 9631 2966
sales@panelvanconversions.com.au
www.panelvanconversions.com.au

PARK MOTOR BODY BUILDERS PTY LTD

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www.parkbodybuilders.com.au

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www.prestigetruckbodies.com.au

RICHARDS COACH WORKS PTY LTD

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enquiries@richardscoachworks.com.au
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Custom Truck Body Building

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mitchell@rogersales.com.au
www.rogertrailers.com.au

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150 Barington Road, Bibra Lake WA 6163
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Toll Free: 1300 767 267
info@roscos.com
www.roscos.com

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info@xl.com.au
www.xl.com.au