

# AUTOMOTIVE MANUFACTURING SNAPSHOT

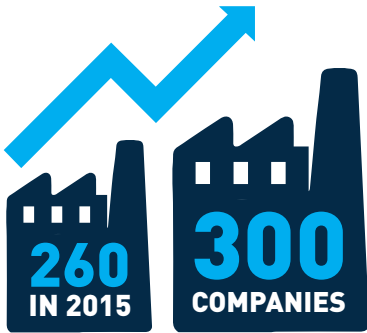


2019

An evaluation of the size, composition and future prospects of the Australian automotive manufacturing industry.

## OVERVIEW

With the dust settling in the wake of car manufacturers ceasing vehicle production in Australia, the automotive manufacturing sector has had to recalibrate, but positive signs are emerging.



## A FRESH INDUSTRY START

EXISTING  
**COMPANIES  
PIVOTING**

Skilled workers  
from vehicle  
manufacturing

STARTING  
**NEW  
VENTURES**

Shifting from  
lower-margin  
volume operations

TOWARDS  
**INNOVATIVE,  
START-UP  
MENTALITY**

## KEY PRODUCT MARKETS

The average company produces parts and accessories for 4 types of vehicles, with 4WD's the most common market.



**86%**  
4WD



**70%**  
PASSENGER  
VEHICLES



**58%**  
LIGHT  
COMMERCIAL



**56%**  
PERFORMANCE


## EXPORT HORIZONS



sell outside of  
**AUSTRALIA**



NZ, U.S & EUROPE  
**BIGGEST  
EXPORT  
MARKETS**

**\$640  
MILLION** 

Combined industry export value

## BUSINESS PRIORITIES



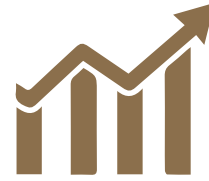
**DEVELOPING  
NEW PRODUCTS  
AND SERVICES**



**NEW  
TECHNOLOGY  
INVESTMENT**



**RESEARCH AND  
DEVELOPMENT**



**EXPLORE NEW  
MARKETS**



**EMPLOY MORE  
SKILLED  
LABOUR**

## INDUSTRY CHALLENGES



**AUSTRALIAN  
DOLLAR**



**ECONOMIC  
SENTIMENT**



**UTILITY  
COSTS**

## POSITIVE GROWTH OUTLOOK

**93%**  
EXPECT  
REVENUE TO  
GROW

With renewed optimism and market adaptation, the automotive manufacturing sector is positioning itself for future success both in Australia and international markets.

**82%**  
BELIEVE EXPORT  
VOLUME WILL  
INCREASE