



AMWU Report

IndustriALL Automotive Conference
St Petersburg, Russia
September 2012





The Australian Auto Industry

- Total sales 1 million a year
- 46 Brands and 226 different models sold in Australia
- One of the most open markets in the World (effective tariff rate of 3.5%)
- One of the few countries in the World able to design & manufacture vehicles from the ground up



Car Makers in Australia

- General Motors Holden
- Ford Australia
- Toyota Australia

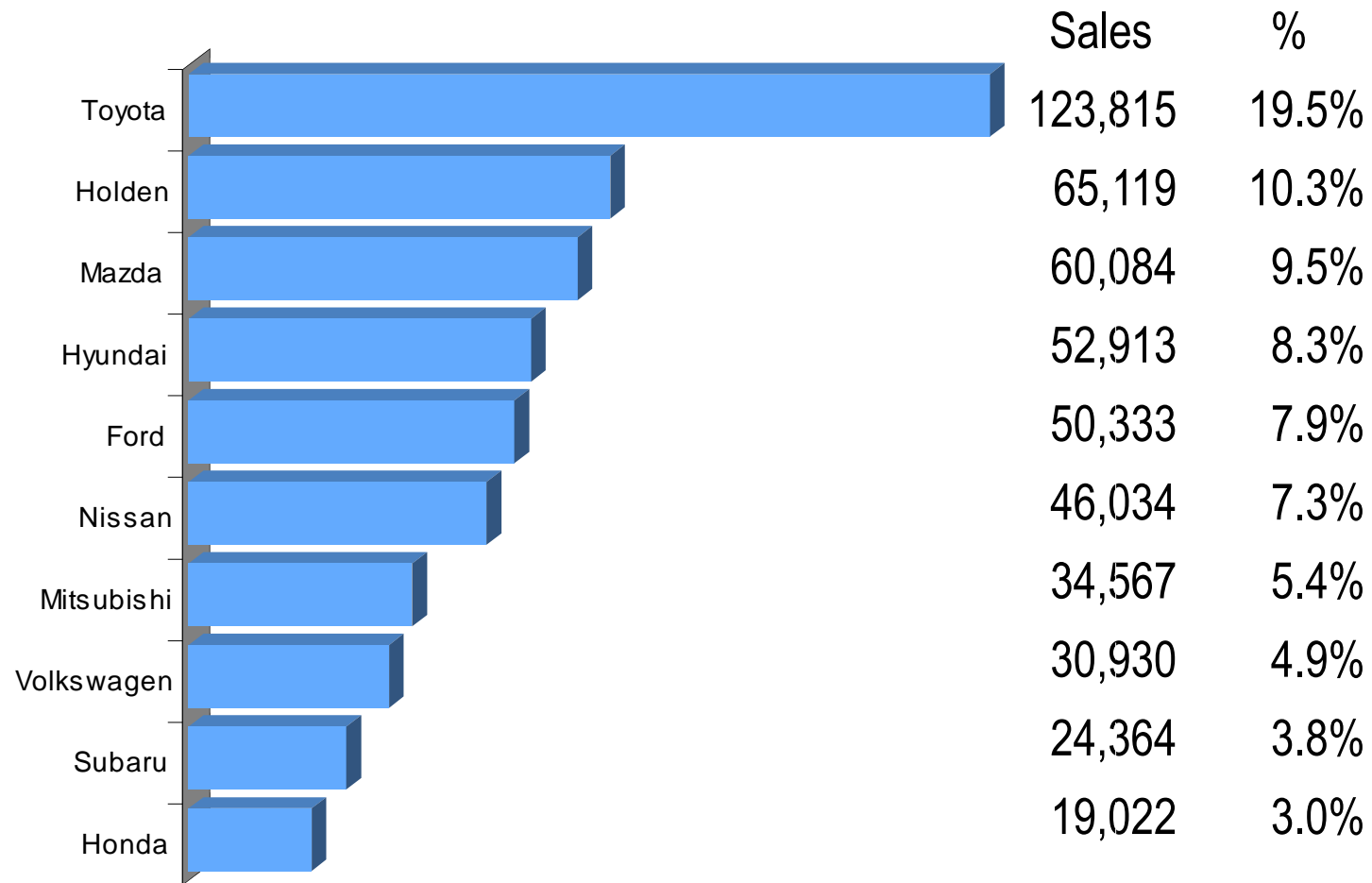
Total employment (including parts makers) = 60,000

Exports (Cars & Parts) \$A3 billion pa





Top 10 Brands (to July 2012)

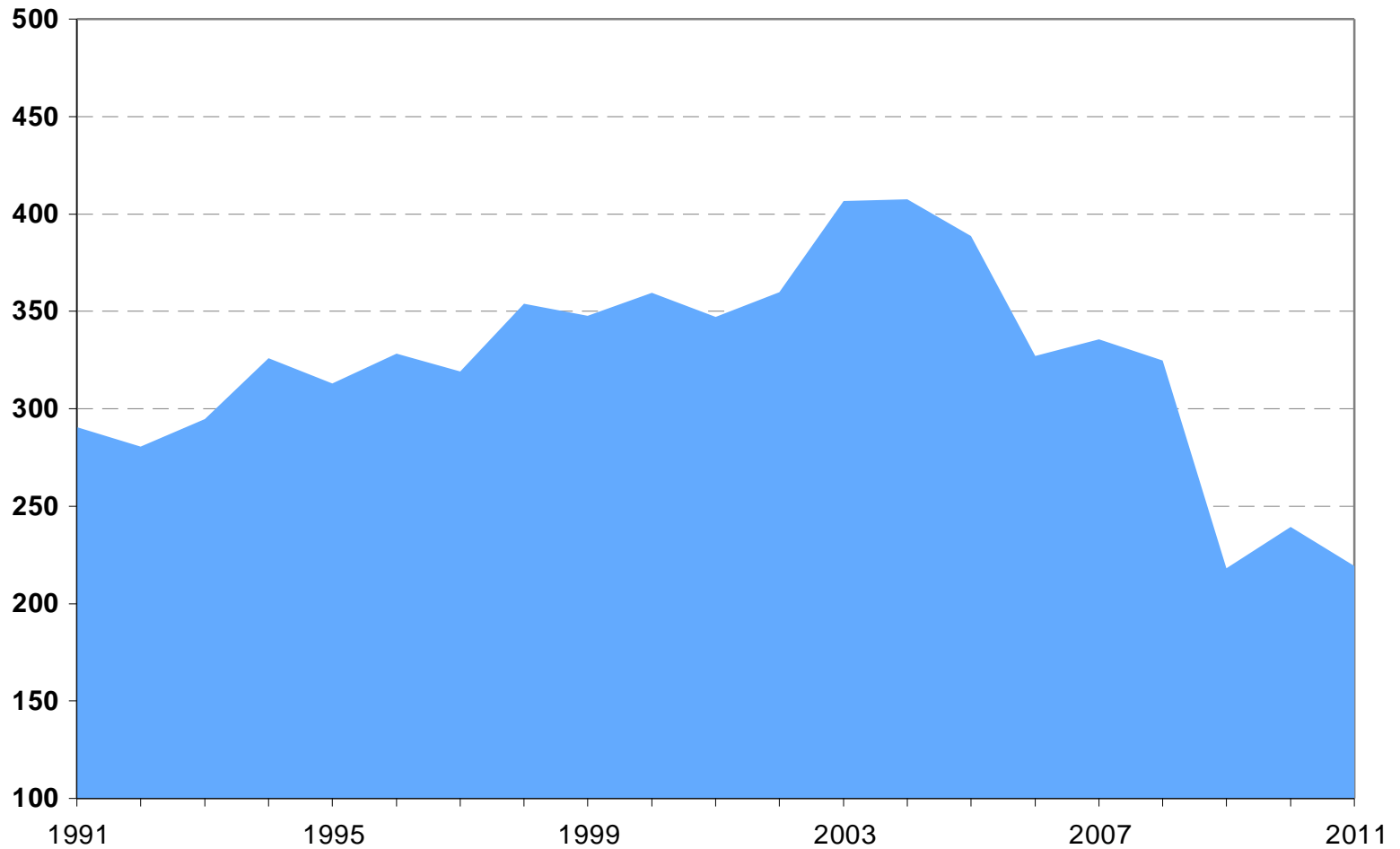




Retaining Scale & Complexity

- Numbers of cars produced are falling due to increasing import penetration and loss of export markets

Vehicle Production (000's)

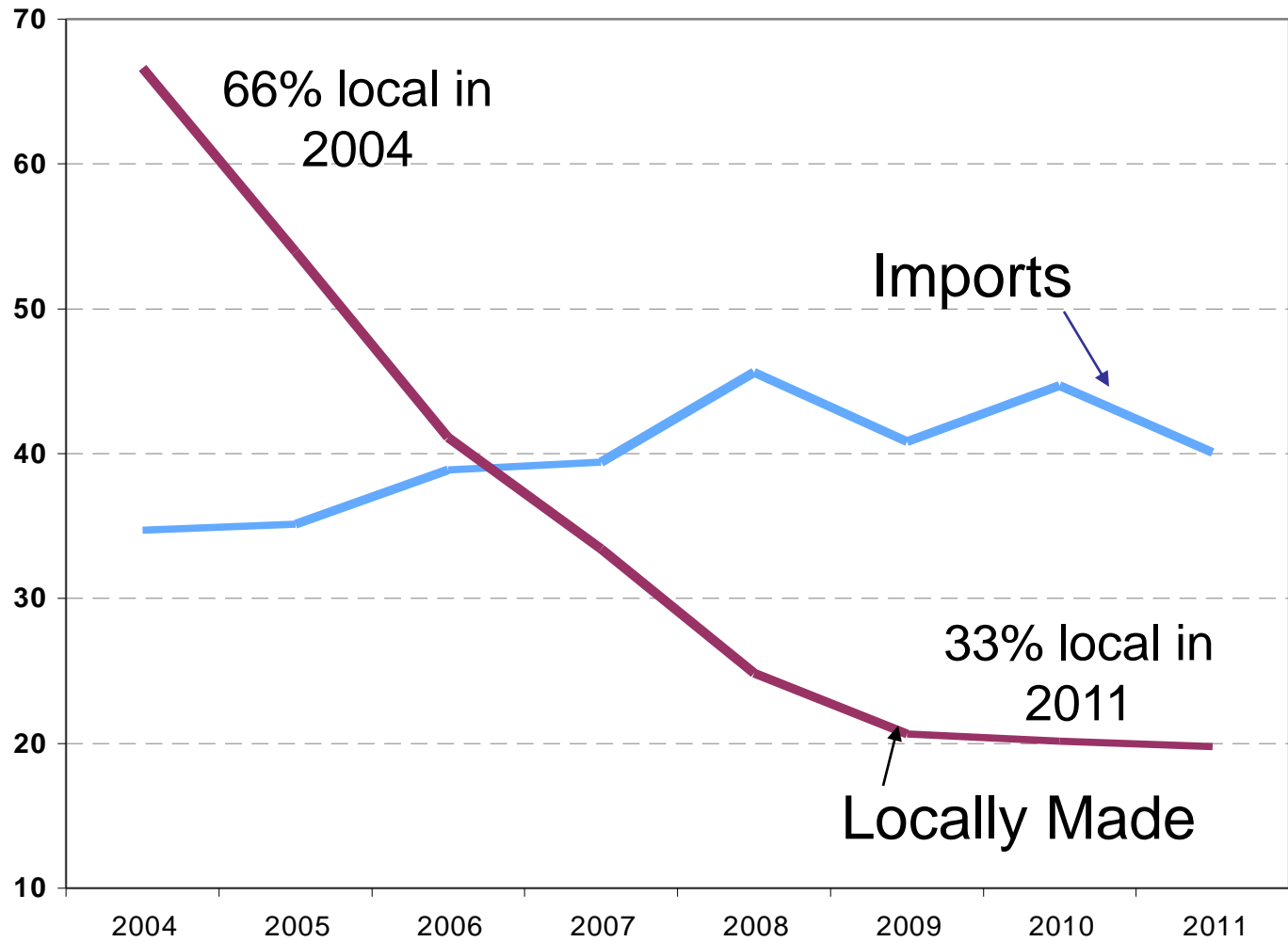




Retaining Scale & Complexity

- The AMWU is calling on State and Federal governments to buy locally-made cars.

Government Fleet Sales (000's)





Industrial Relations

- Union density in the 3 car makers & tier one parts suppliers is high
- Cooperative IR climate despite the occasional hiccup
- Support for the industry and the good industrial environment is threatened by potential election of a conservative government.



Thank you!

