



Automotive Melbourne, Victoria, Australia

Melbourne, Victoria is the home of Australia's well-developed automotive industry, with clusters of key assemblers, component companies, design houses, toolmakers and other service providers. Victoria provides a highly-skilled workforce and excellent automotive R&D facilities, with specialist capabilities in design, engineering, materials applications and manufacturing.

Although the Australian automotive industry is small by world standards, it's one of the few locations globally that has a full range of capabilities, from concept to delivery. Our competitive edge in automotive design relates to a flexibility in design and customisation that is difficult to replicate in other locations. The industry operates within a flexible and supportive legislative environment, as demonstrated by both the Victorian and Australian Governments' ongoing commitment to collaboration with industry, research organisations and universities.

Market Opportunities & Potential

- Fast and cost-effective technological development of new variants from concept to production
- Applications engineering (i.e. conversion from concept to application within a model)
- Research & Design: leveraging the versatility and creativity of Australian engineering
- World-class infrastructure, supporting the export of automotive vehicles and components
- Rapid developments in alternative fuel and energies, drive by wire and computer systems integration
- Sophisticated market, suitable for testing niche products and customisation
- Melbourne operates within the Asian time zone, with the benefit of bridging American and European business hours

Table 1. The Victorian and Australian automotive industry

| Size of Industry | Victoria (% of Aus. total) | Australia | Source |
|---|-------------------------------|-----------------------------|---|
| Industry turnover | A\$15.3 billion (45.5%) | A\$33.6 billion | ABS 2006-7 released Sep 2008 (latest published data) |
| Vehicle manufacturers | GM Holden Ford Toyota | GM Holden Ford Toyota | |
| Vehicles produced annually (2008) | 211 000 (62.8%) | 336 000 | AAI 2009 |
| Component manufacturing revenue | | A\$6.0 billion | IBIS 2009 |
| Research and development expenditure in 2006-07 | A\$654 million (74.7%) | A\$875 million | ABS 2006-07 |
| Market Size Domestic | | | |
| Vehicles on the road | 3.8 million | 14.8 million | ABS 2006-07 |
| Sales of vehicles per annum (2008) | | 1 million (approx) | AAI 2009 |
| Market Size International | | | |
| Automotive exports (2008) | A\$2.9 billion (50.2%) | A\$5.8 billion | DFAT 2008 |
| Vehicle exports per annum (2008) | 106,000 (66.3%) | 160,000 | AAI 2009 |

Industry Participants – Victoria

Victoria's automotive industry is based in Melbourne, and contains some of the world's leading vehicle manufacturers, supported by domestic and international suppliers and leading edge automotive design companies.

Table 2. Industry Participants – Victoria

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| Ford Motor Company of Australia Limited | Headquartered in Melbourne, Ford's Victorian operations include an engine plant, design studio, stamping and assembly plant, foundries, vehicle proving ground, wind tunnel and other manufacturing and design facilities. Melbourne is Ford's centre of excellence for the Asia-Pacific region and is responsible for the design of the next generation Falcon/Territory and a range of light commercial utility vehicles. www.ford.com.au |
| GM Holden Limited | Holden operations in Melbourne include vehicle design, engineering and testing facilities. There is also an engine manufacturing operation, producing the HFV6 all alloy engine for domestic and export markets. Holden has a vehicle proving ground in Victoria and an assembly vehicle plant in South Australia. www.holden.com.au |
| Toyota Motor Corporation Australia | Melbourne is home to one of Toyota Japan's global manufacturing centres, with its head office, engine plant, assembly plant, design studio and engineering facilities based here. Toyota Australia exports more than half its production to the Middle East, South Africa and New Zealand. www.toyota.com.au |
| Futuris Automotive Interiors (Australia) Pty Ltd | Futuris is a successful and innovative supplier of automotive products and automotive solutions, operating a growing international network of design and manufacturing facilities. Futuris provides fully integrated solutions for the design and development of automotive interior systems, from concept to volume production. www.futurisautomotive.com |
| Toll Holdings Limited | Toll Group is the leading integrated logistics provider in the Asian region and operates an extensive network, delivering key supply chain solutions. Toll has an exceptional presence in Asia, in countries including China, Japan, Singapore, Korea and India. www.toll.com.au |
| Air International Thermal (Australia) Pty Ltd | Air International Thermal Systems designs and supplies heating ventilation air conditioning (HVAC) and power train cooling (PTC) systems to automotive manufacturers. Its head office, technical centre and an assembly plant are all in Victoria. www.aithermalsystems.com |
| Autoliv Australia | A leading supplier of car-safety products to the Australian vehicle industry, providing a range of design, testing and assembly services. Autoliv has a comprehensive test centre in Melbourne. www.autoliv.com |
| Continental Pty Ltd | A leading manufacturer and supplier of sophisticated automotive products in Australia and overseas. This includes the design, development and production of full cockpit modules, air intake manifold, climate control modules, electronic control units, and a range of after-market products. aftermarket.continental-corporation.com.au/ |
| Cooperative Research Centre for Advanced Automotive Technology (AutoCRC) | AutoCRC was created as part of a national strategy to secure Australia's position in the global automotive industry. Its participants are eight leading vehicle and component manufacturers, two state governments and ten research institutions, with a total investment in research and training of \$100m over seven years. www.autocrc.com |
| Delphi Automotive Systems Australia Ltd | Delphi is a leading global supplier of mobile electronics and transportation systems, including powertrain, safety, steering, thermal, and controls & security systems, electrical/electronic architecture, and in-car entertainment technologies. www.delphi.com |
| Iveco Trucks Australia (part of the Fiat Group) | Based in Melbourne, the Australian design team has world designation for the engineering of heavy vehicles and trucks and is often commissioned by other worldwide Iveco plants to design and re-engineer trucks for new applications. www.iveco.com.au |
| PBR - Bosch Chassis Systems Asia Pacific | PBR is a leading designer and manufacturer of brake systems and technologies with plant facilities in Australia, North America, China and South East Asia. It is a major supplier to Toyota, Holden and other vehicle manufacturers. www.pbr.com.au |
| Prodrive Automotive Technology | Prodrive is one of the world's leading automotive technology businesses, with operations in the UK, Thailand and Australia. Prodrive has worked with the world's leading vehicle manufacturers and their suppliers to develop innovative technologies for their vehicles. Melbourne is home to Prodrive's Asia-Pacific regional head office. www.prodrive.com |
| Robert Bosch (Australia) Pty Ltd | With its Australian headquarters in Melbourne, Robert Bosch has been a central part of the Australia automotive scene for over 50 years. The company develops automotive technology for vehicle manufactures in Australia and for export markets. www.bosch.com.au |
| Toyota Technical Centre Asia Pacific | Forming part of a global network of five integrated design centres, the Toyota Technical Centre uses Toyota's latest research and development tools and methods. The centre is considered one of the most advanced automotive design and engineering facilities, supporting Toyota's manufacturing in seven countries. www.toyota.com.au |

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