



# Automotive

## Melbourne, Victoria, Australia

Melbourne, Victoria is the home of Australia's well-developed automotive industry, with a cluster 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 of innovative metals, plastics, electronic and mechanical products.

Although the Australian automotive industry is small by world standards, it's one of the few locations globally that has the 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.

### Market opportunities & Potential

- Research & Design: leveraging the versatility and creativity of Australian engineering
- Niche opportunities arising from developments in: alternative fuel and energies, drive by wire, computer systems integration
- Fast tracking for technology development: fast/cost efficient development of new variants from concept to production
- Applications engineering (i.e. conversion from concept to application within a model)
- Sophisticated market suitable for testing niche products and customisation
- Melbourne time zone bridges the European and American business hours, enabling around-the-clock access to engineering and design services
- Leveraging our world-class infrastructure to support the export of automotive vehicles and components

*Table 1. The Victorian and Australian automotive industry*

Size of Industry	Victoria (% of Aus. total)	Australia	Source
Industry turnover	A\$14 billion (57%)	A\$24 billion	ABS 2003–04 (latest published data)
Vehicle manufacturers	GM Holden, Ford, Toyota	GM Holden, Ford, Toyota, Mitsubishi	FAPM 2006
Vehicles produced annually (Dec 2006)		340,200	AAI
Component manufacturing revenue (2004–05)		A\$6.9 billion	IBIS 2006
Research and development expenditure in 2004–05	A\$510.7 million (84%)	A\$608 million	ABS 2004–05
<b>Market Size Domestic</b>			
Vehicles on the road		14 million	VACC 2006
Sales of vehicles per annum		1 million (approx)	FAPM 2006
Australian automotive retail industry		A\$120 billion	ABS 2005
<b>Market Size International</b>			
Automotive exports	A\$2.7 billion (53%)	A\$5.14 billion	DFAT 2006 Export Data
Vehicle exports per annum		130,000	DFAT 2006 Export Data

ABS – Australian Bureau of Statistics

FAPM – Federation of Automotive Products Manufacturers

VACC – Victorian Automotive Chamber of Commerce

DFAT – Department of Foreign Affairs and Trade (Australian Government)

AAI – Australian Automotive Intelligence

## Industry Participants – Melbourne, Victoria

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

Table 2. Industry Participants – Melbourne, Victoria

<b>Ford Motor Company of Australia Limited</b>	Headquartered in Melbourne, with an engine plant, design studios, assembly plant, stamping plant, foundries, vehicle proving ground 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. <b><a href="http://ford.com.au">ford.com.au</a></b>
<b>GM Holden Ltd</b>	GM Holden is one of the largest automotive manufacturers in Australia with its vehicle design, engineering and testing facilities based in Port Melbourne. This facility also includes two engine manufacturing operations producing the HFV6 all alloy engine for domestic and export markets, and the Family II 4 cylinder engines exclusively for export sales.  GM Holden is the global design and engineering centre for large rear wheel drive (RWD) passenger car programs for General Motors Corporation. The Holden-developed Zeta platform has been totally designed in Australia for the production of a range of vehicles at various General Motors plants around the world. <b><a href="http://holden.com.au">holden.com.au</a></b>
<b>Toyota Motor Corporation Australia</b>	One of Toyota Japan's global manufacturing centres with its head office, engine plant, assembly plant, design studio and engineering facilities in Melbourne. Toyota Australia exports more than 60% of its production to the Middle East, South Africa and New Zealand. <b><a href="http://toyota.com.au">toyota.com.au</a></b>
<b>Toyota Technical Centre Asia Pacific</b>	Forming part of a global network of five integrated design centres using Toyota's latest research and development tools and methods. Within the region, the centre is considered one of the most advanced automotive design and engineering facilities, supporting Toyota's manufacturing in seven countries. <b><a href="http://toyota.com.au">toyota.com.au</a></b>
<b>EDAG Australia</b>	Employs around 100 people in Melbourne and provides design, engineering and product development services to motor vehicle producers and component manufacturers. The Melbourne time-zone conveniently bridges the European and American business hours enabling the firm to provide 24 hour around-the-globe engineering services. <b><a href="http://edag.com.au">edag.com.au</a></b>
<b>Autoliv Australia</b>	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 Campbellfield. <b><a href="http://autoliv.com">autoliv.com</a></b>
<b>Siemens VDO Automotive Pty Ltd</b>	Siemens VDO Automotive employs around 350 people in the engineering and manufacturing of sophisticated automotive products for all four vehicle manufacturers in Australia and for customers overseas including BMW in Germany.  Their work includes the design, development and production of full cockpit modules, air intake manifold modules, instrument cluster assemblies, climate control modules, infotainment systems, digital and analogue clocks, electronic control units, trip computers, information displays, high-precision plastic mouldings, navigation systems and instrumentation.  Siemens VDO has recently expanded its manufacturing and R&D facilities in Australia to maximise the benefits of the local skilled, multicultural and motivated workforce. <b><a href="http://siemens.com.au">siemens.com.au</a></b>
<b>Iveco Trucks Australia (part of the Fiat Group)</b>	Based in Melbourne, the Australian design team has world designation for the engineering of bonneted trucks and is often commissioned by other worldwide Iveco plants to design and re-engineer trucks for new applications. <b><a href="http://iveco.com.au">iveco.com.au</a></b>
<b>Air International Thermal</b>	Technical Centre (Head Office) and Assembly Plant based in Victoria. <b><a href="http://thermal.airinter.com.au">thermal.airinter.com.au</a></b>
<b>Futuris Automotive Interiors (Australia) Pty Ltd</b>	The Global Technical Centre at Port Melbourne supports international product development activities, carpet manufacturing in Tullamarine and interior systems assembly at Campbellfield. <b><a href="http://futurisautomotive.com">futurisautomotive.com</a></b>
<b>Mahle Engine Components Australia Pty Ltd</b>	Manufactures power cell assemblies for Holden's HFV6 engine program, also a major piston supplier to Ford, Toyota and Mitsubishi. <b><a href="http://mahle.com">mahle.com</a></b>
<b>Robert Bosch (Australia) Pty Ltd</b>	With its Australian headquarters in Melbourne, it has been a central part of the Australia automotive scene for over 50 years. The company develops automotive technology for the base of international vehicle manufactures in Australia. Robert Bosch exports around five tonnes of electronic products to Europe daily. <b><a href="http://bosch.com.au">bosch.com.au</a></b>
<b>Pacifica Group Limited (a division of Robert Bosch GmbH)</b>	Pacifica 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, GMH Holden and other major vehicle manufacturers. <b><a href="http://pacifica.com.au">pacifica.com.au</a></b>