FEBRUARY 2013 VFACTS REPORT

Autoteam Australia Consulting Pty Ltd ACN 129 159 691
22 Withers Way Eltham Vic 3095 Australia
M 0404 835 571 **F** 03 9444 0903 **E** ajl@ataconsulting.com.au

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FEBRUARY 2013 VFACTS HIGHLIGHTS

February 2013, the Automotive Industry in Australia achieved total vehicle sales of 90,218 units, up 4,495 units or 5.2% on February month 2012. February 2013 retail sales volume represents the best February sales month on record, and, on a Seasonally Adjusted Annual Rate, the industry for February 2013 came in at 1,139,000 units. The Vehicle Industry has now achieved a SAAR of in excess of 1,000,000 units in each of the past 16 months, with the last eight months each achieving record volume for the Vehicle Industry. On a rolling twelve month basis the industry has recorded total vehicle sales of 1,125,174 units.

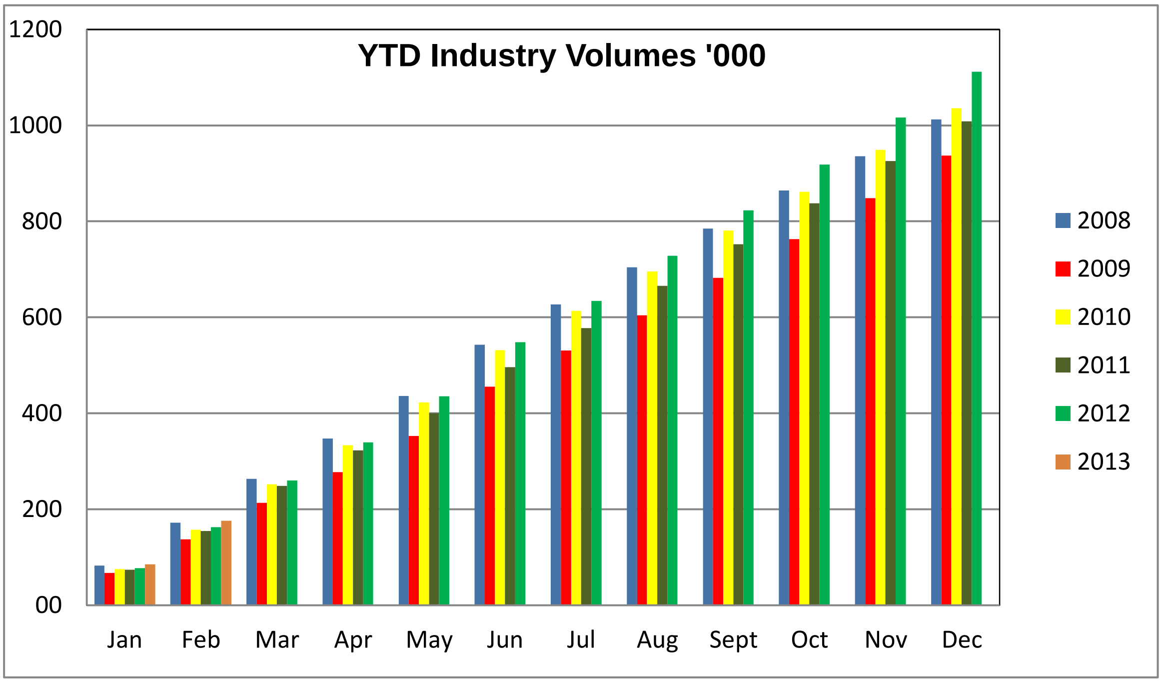
The Passenger Segment was the only segment to incur a volume loss year over year, down 2,631 units or 5.7%. SUV and Light Commercial Segments continue to lead the industry growth, up 14.2% and 26.9% respectively.

Autoteam forecast is for the total vehicle industry to achieve a full year volume in 2013 of 1,075,000 units.

Continuing to drive industry sales volumes are the manufacturers "finance offer" marketing incentives and the push by manufacturers to achieve sales volume targets and market share projections. March will see a continuation of the heavy marketing programs as the Japanese financial year ends in March and manufacturers strive to achieve sales targets.

What will also drive sales volume is the push by both manufacturers and dealers to clear 2012 plated vehicles still in inventory.

February year to date, the Total Vehicle Industry has achieved vehicle sales of 175,648 units, up 13,142 units or 8.1% on the same time last year. February year to date 2013 represents the best February year to date on record. February year to date the Automotive Industry is running at a SAAR of 1,164,000 units.



With the makeup of the vehicle Passenger Industry changing and the continued growth in the SUV and Light Commercial 4X4 segments, those brands with new and desirable products in these industry segment will continue to achieve volume and share growth. To this end we see many manufacturers redirecting their R&D spending on vehicles in these two market segments. These vehicles provide the consumer an alternative lifestyle of off road driving, although it must be said very few ever go off road, and a higher driving position.

Relying on the same products to achieve sales volume and market share will not work in future as consumer preferences have and will continue to change towards Light/Small cars, SUVs and 4X4 Light Commercials. The industry is dynamic where the consumer wants the latest and best available at a competitive price. Consumer loyalty to a brand has diminished as more and more new products enter the Australian Vehicle Market.

This is demonstrated by the table below which details the growth segments of the vehicle industry.

February vehicle sales compared to history is as follows:

Record Vehicle Industry

	February Month	February YTD
Passenger	12th	9th
SUV	1st	1st
Light Commercial	1st	1st
Heavy Truck	3rd	3rd
Total Industry	1st	1st

Industry Highlights

- Among the top 30 brands in the market place February year to date, only Holden, Subaru, Great Wall, Volvo, Hino, Mini and Dodge are down in sales volume year over year, while Nissan, Honda, Mercedes, Jeep, Isuzu Ute and Renault have all achieved year over year volume growth of in excess of 30%, although several off a low volume base.

- The Passenger Segment was the only segment to incur a volume loss year over year and for February accounted for only 48.1% of total industry volume. The growth of SUV sales has resulted in SUVs accounting for 29.7% of all vehicle sales, while Light Commercials accounted for 19.6% of all vehicle sales. Combined, SUV and Light Commercial sales were greater than Passenger Segment sales for the month. This is a reflection of the make up of the US vehicle over the beginning of the century.
- Among the Passenger Industry, the Medium Segment incurred year over year volume loss of 1,920 units (Honda Euro and Ford Mondeo) and the Large segment was down 1,477 units (Holden Commodore and Ford Falcon). The Sports Segment volume continues to grow, driven by the success of the Toyota 86.
- The Upper Large Segment of the SUV Industry was the only segment to incur a year over year volume loss, down 121 units or 10.8%. Growth for the Small SUV Segment was driven by Hyundai ix35 and Nissan Dualis and Medium Segment growth was led by Honda CR-V (up 1,067 units).

- The PU/CC 4X4 Segment achieved year on year growth of 3,752 units or 26.9%. Major year over year volume growth was achieved by Ford Ranger, Holden Colorado, Mitsubishi Triton and Toyota HiLux.
- Among the states and territories for the month of February, all achieved volume growth, with Tasmania up most at 14%. The majority of the Tasmanian volume growth was in the rental segment, a market segment where both dealers and manufacturers achieve very little profitability. February year to date, all states and territories have achieved volume growth. Tasmania is up most, 25.8%, ahead of South Australia up 16.5%.
- By buyer type, both Rental and Government sales were down for the month, 54 units and 1,392 units respectively. Private vehicle sales account for 52.6% of all vehicle sales February year to date. February year to date both Rental and Government sales are down year on year.
- By fuel type, petrol vehicle sales continue to lose industry volume and share. Diesel vehicle sales (predominantly SUV and Light Commercial vehicles) were up 4,803 units or 18.1% for the month and year to date account for 33.6% of all vehicles sold compared to 29.5% the same time last year.
- Locally manufactured vehicle industry share for February accounted for just 9.1% of the total industry volume. All local manufacturers were down year over year. Vehicles sourced out of Japan, Thailand and Korea now account for more sales than locally manufactured vehicles. This trend will continue into the future as local production volumes continue to come down.
- Toyota maintained market leadership for the Total, Passenger, SUV and Light Commercial Industries for February. Toyota achieved total February vehicle sales volume of 16,017 units for a market share of 17.8%, ahead of Mazda 8,728 units, Nissan 8,212 units, Holden 7,683 units, Hyundai 7,505 units and Ford 6,591 units.
- Mazda 3 was the top selling vehicle for the month of February with sales of 3,378 units, ahead of HiLux and Corolla. On a year to date basis, Mazda 3 remains the top selling vehicle in the market place, units head of Corolla and HiLux third.

  For the month of February four of the top ten selling vehicles were Light Commercial units.

Top 10 Selling Vehicles

	February Month		February Year To Date	
	Model	Volume	Model	Volume
1	Mazda 3	3378	Mazda 3	6723
2	HiLux	3319	Corolla	6118
3	Corolla	3158	HiLux	6066
4	Navara	2645	Navara	5119
5	Triton	2335	i30	4061
6	i30	2055	Focus	3630
7	Ranger	1739	Triton	3507
8	Commodore	1733	Commodore	3389
9	Cruze	1729	Cruze	2819
10	Dualis	1549	Mazda 2	3203

February 2013 Total Vehicle Industry										
	February Month					February Year To Date				
	Year		Difference		%	Year		Difference		%
	2012	2013	Volume	%	Share	2012	2013	Volume	%	Share
Pass	45969	43338	-2631	-5.7	48.1	88483	85295	-3188	-3.6	48.6
SUV	23498	26834	3336	14.2	29.7	45662	53457	7795	17.1	30.4
Lt Com'l	13958	17710	3752	26.9	19.6	24361	32682	8321	34.2	18.6
Hvy Trk	2298	2336	38	1.7	2.6	4000	4214	214	5.4	2.4
Total	85723	90218	4495	5.2	100.0	162506	175648	13142	8.1	100.0

February 2013 Vehicle Segmentation										
	February Month					February Year To Date				
	Year		Difference		%	Year		Difference		%
	2012	2013	Volume	%	Share	2012	2013	Volume	%	Share
Light	10880	10999	119	1.1	25.4	20568	22535	1967	9.6	26.5
Small	19723	19983	260	1.3	46.1	39090	39110	20	0.1	45.9
Medium	7205	5285	-1920	-26.6	12.2	13559	9851	-3708	-27.3	11.5
Large	5263	3786	-1477	-28.1	8.7	9976	7446	-2530	-25.4	8.7
Up Large	206	419	213	103.4	1.0	351	699	348	99.1	0.8
PM	841	664	-177	-21.0	1.5	1752	1270	-482	-27.5	1.5
Sports	1851	2202	351	19.0	5.1	3187	4384	1197	37.6	5.1
Pass.	45969	43338	-2631	-5.7	100.0	88483	85295	-3188	-3.6	100.0
Small	5073	6104	1031	20.3	22.7	9299	11329	2030	21.8	21.1
Medium	8122	9758	1636	20.1	36.4	16164	19220	3056	18.9	36.0
Large	9182	9972	790	8.6	37.2	17586	20572	2986	17.0	38.5
Upper Large	1121	1000	-121	-10.8	3.7	2613	2336	-277	-10.6	4.4
SUV	23498	26834	3336	14.2	100.0	45662	53457	7795	17.1	100.0
Bus<20	298	228	-70	-23.5	1.3	487	386	-101	-20.7	1.3
Bus >20	81	58	-23	-28.4	0.3	184	114	-70	-38.0	0.3
Van/CC	288	235	-53	-18.4	1.3	452	462	10	2.2	1.4
Van/CC	1510	1332	-178	-11.8	7.5	2721	2432	-289	-10.6	7.4
PU/CC 4X2	3481	3785	304	8.7	21.4	6092	7194	1102	18.1	22.0
PU/CC 4X4	8300	12072	3772	45.4	68.2	14425	22094	7669	53.2	67.6
Lt Com'l	13958	17710	3752	26.9	100.0	24361	32682	8321	34.2	100.0

February 2013 Sales By State										
	February Month					February Year To Date				
	Year		Difference		%	Year		Difference		%
	2012	2013	Volume	%	Share	2012	2013	Volume	%	Share
NSW	26386	27427	1041	3.9	30.4	50389	53621	3232	6.4	30.6
Victoria	23270	24415	1145	4.9	27.1	43548	46998	3450	7.9	26.8
Q'land	17839	18369	530	3.0	20.4	33571	35315	1744	5.2	20.1
Wst Aust	9673	10679	1006	10.4	11.8	18687	20877	2190	11.7	11.9
Sth Aust	5344	5696	352	6.6	6.3	9966	11614	1648	16.5	6.6
ACT	1287	1456	169	13.1	1.6	2593	2896	303	11.7	1.6
Tasmania	1148	1309	161	14.0	1.5	2156	2712	556	25.8	1.5
NT	776	867	91	11.7	1.0	1596	1615	19	1.2	0.9
Total	85723	90218	4495	5.2	100.0	162506	175648	13142	8.1	100.0

February 2013 Sales By Buyer Type										
	February Month					February Year To Date				
	Year		Difference		%	Year		Difference		%
	2012	2013	Volume	%	Share	2012	2013	Volume	%	Share
Private	41975	45426	3451	8.2	50.3	82081	92448	10367	12.6	52.6
Business	35004	37494	2490	7.1	41.6	65737	71363	5626	8.6	40.6
Rental	4141	4087	-54	-1.3	4.5	6418	6061	-357	-5.6	3.5
Govt	4603	3211	-1392	-30.2	3.6	8270	5776	-2494	-30.2	3.3
Total	85723	90218	4495	5.2	100.0	162506	175648	13142	8.1	100.0

February 2013 Sales By Fuel Type										
	February Month					February Year To Date				
	Year		Difference		%	Year		Difference		%
	2012	2013	Volume	%	Share	2012	2013	Volume	%	Share
Petrol	58242	57960	-282	-0.5	64.3	112561	114926	2365	2.1	65.4
Diesel	26514	31317	4803	18.1	34.7	48060	58932	10872	22.6	33.6
Hybrid	583	806	223	38.3	0.9	1197	1478	281	23.5	0.8
LPG	384	135	-249	-64.8	0.1	688	312	-376	-54.7	0.2
Total	85723	90218	4495	5.2	100.0	162506	175648	13142	8.1	100.0

February 2013 Top 10 Production Locations										
	February Month					February Year To Date				
	Year		Difference		%	Year		Difference		%
	2012	2013	Volume	%	Share	2012	2013	Volume	%	Share
Holden	6631	3896	-2735	-41.2	4.3	11815	7735	-4080	-34.5	4.4
Ford	2995	2510	-485	-16.2	2.8	5124	4757	-367	-7.2	2.7
Toyota	1875	1829	-46	-2.5	2.0	4154	2613	-1541	-37.1	1.5
Local	11501	8235	-3266	-28.4	9.1	21093	15105	-5988	-28.4	8.6
Japan	32366	29029	-3337	-10.3	32.2	63161	57872	-5289	-8.4	32.9
Thailand	10143	20319	10176	100.3	22.5	17499	38643	21144	120.8	22.0
Korea	11034	11058	24	0.2	12.3	22167	22554	387	1.7	12.8
Germany	7371	5605	-1766	-24.0	6.2	14097	11117	-2980	-21.1	6.3
England	1940	3440	1500	77.3	3.8	3711	6431	2720	73.3	3.7
USA	1948	2852	904	46.4	3.2	3537	5434	1897	53.6	3.1
India	1295	935	-360	-27.8	1.0	2385	2055	-330	-13.8	1.2
China	1157	704	-453	-39.2	0.8	2115	1455	-660	-31.2	0.8
South Afr.	296	514	218	73.6	0.6	630	1008	378	60.0	0.6
Other	6672	7527	855	12.8	8.3	12111	13974	1863	15.4	8.0
Total	85723	90218	4495	5.2	100.0	162506	175648	13142	8.1	100.0

February 2013 Top 30 Nameplates										
	February Month					February Year To Date				
	Year		Difference		%	Year		Difference		%
	2012	2013	Volume	%	Share	2012	2013	Volume	%	Share
Toyota	14849	16017	1168	7.9	17.8	28914	29392	478	1.7	16.7
Mazda	8689	8728	39	0.4	9.7	17168	17640	472	2.7	10.0
Holden	9688	7683	-2005	-20.7	8.5	18749	16494	-2255	-12.0	9.4
Nissan	6227	8212	1985	31.9	9.1	11585	15460	3875	33.4	8.8
Hyundai	7412	7505	93	1.3	8.3	13925	14321	396	2.8	8.2
Ford	6951	6591	-360	-5.2	7.3	12789	14312	1523	11.9	8.1
Mitsubishi	5166	6009	843	16.3	6.7	9732	10458	726	7.5	6.0
Volks.	4132	4200	68	1.6	4.7	7498	8024	526	7.0	4.6
Honda	2603	3862	1259	48.4	4.3	4182	7678	3496	83.6	4.4
Subaru	3225	3106	-119	-3.7	3.4	6430	6210	-220	-3.4	3.5
KIA	1990	2204	214	10.8	2.4	4266	4512	246	5.8	2.6
Mercedes	1580	1890	310	19.6	2.1	2785	3649	864	31.0	2.1
Suzuki	1851	1736	-115	-6.2	1.9	3518	3570	52	1.5	2.0
Jeep	1452	1740	288	19.8	1.9	2534	3382	848	33.5	1.9
BMW	1221	1501	280	22.9	1.7	2434	2802	368	15.1	1.6
Audi	1200	1416	216	18.0	1.6	2534	2761	227	9.0	1.6
L/Rover	717	651	-66	-9.2	0.7	1365	1485	120	8.8	0.8
Isuzu Ute	640	801	161	25.2	0.9	1010	1461	451	44.7	0.8
Great Wall	1015	603	-412	-40.6	0.7	1883	1260	-623	-33.1	0.7
Isuzu	522	461	-61	-11.7	0.5	919	984	65	7.1	0.6
Lexus	421	541	120	28.5	0.6	858	971	113	13.2	0.6
Volvo Car	533	407	-126	-23.6	0.5	1007	870	-137	-13.6	0.5
Peugeot	362	413	51	14.1	0.5	668	817	149	22.3	0.5
Renault	234	375	141	60.3	0.4	438	706	268	61.2	0.4
Hino	333	354	21	6.3	0.4	597	596	-1	-0.2	0.3
Mits Fuso	281	316	35	12.5	0.4	488	552	64	13.1	0.3
Skoda	324	275	-49	-15.1	0.3	477	527	50	10.5	0.3
Mini	223	189	-34	-15.2	0.2	375	350	-25	-6.7	0.2
Kenworth	152	201	49	32.2	0.2	276	314	38	13.8	0.2
Dodge	130	156	26	20.0	0.2	251	250	-1	-0.4	0.1
Other	1600	2075	475	29.7	5.8	2851	3840	989	34.7	5.6
Total	85723	90218	4495	5.2	100.0	162506	175648	13142	8.1	100.0

February 2013 Top 20 Passenger Nameplates										
	February Month					February Year To Date				
	Year		Difference		%	Year		Difference		%
	2012	2013	Volume	%	Share	2012	2013	Volume	%	Share
Toyota	6482	6969	487	7.5	16.1	13764	12770	-994	-7.2	15.0
Mazda	6067	5684	-383	-6.3	13.1	12427	11456	-971	-7.8	13.4
Hyundai	5725	4918	-807	-14.1	11.3	10671	9503	-1168	-10.9	11.1
Holden	7222	4577	-2645	-36.6	10.6	13436	9084	-4352	-32.4	10.7
Ford	4096	3013	-1083	-26.4	7.0	7855	7620	-235	-3.0	8.9
Honda	2438	2630	192	7.9	6.1	3766	5329	1563	41.5	6.2
Volks.	2692	2717	25	0.9	6.3	4940	4916	-24	-0.5	5.8
Nissan	1328	2084	756	56.9	4.8	2123	3807	1684	79.3	4.5
Mitsubishi	1498	1873	375	25.0	4.3	3016	3237	221	7.3	3.8
KIA	1467	1610	143	9.7	3.7	3215	3220	5	0.2	3.8
Suzuki	1449	1308	-141	-9.7	3.0	2697	2802	105	3.9	3.3
Mercedes	1181	1400	219	18.5	3.2	2103	2615	512	24.3	3.1
Subaru	719	726	7	1.0	1.7	1789	1509	-280	-15.7	1.8
Audi	891	692	-199	-22.3	1.6	1657	1451	-206	-12.4	1.7
BMW	743	717	-26	-3.5	1.7	1436	1450	14	1.0	1.7
Peugeot	324	322	-2	-0.6	0.7	588	644	56	9.5	0.8
Lexus	325	345	20	6.2	0.8	644	611	-33	-5.1	0.7
Skoda	209	209	0	0.0	0.5	320	380	60	18.8	0.4
Volvo Car	180	143	-37	-20.6	0.3	338	293	-45	-13.3	0.3
Dodge	59	0	-59	-100.0	0.0	123	0	-123	-100.0	0.0
Other	874	1401	527	60.3	3.2	1575	2598	1023	65.0	3.0
Total	45969	43338	-2631	-5.7	100.0	88483	85295	-3188	-3.6	100.0

February 2013 Top 20 SUV Nameplates										
	February Month					February Year To Date				
	Year		Difference		%	Year		Difference		%
	2012	2013	Volume	%	Share	2012	2013	Volume	%	Share
Toyota	4482	4314	-168	-3.7	16.1	8847	8040	-807	-9.1	15.0
Nissan	2797	3375	578	20.7	12.6	5578	6365	787	14.1	11.9
Subaru	2506	2380	-126	-5.0	8.9	4641	4701	60	1.3	8.8
Hyundai	1141	2146	1005	88.1	8.0	2260	3987	1727	76.4	7.5
Holden	1328	1497	169	12.7	5.6	2987	3798	811	27.2	7.1
Mazda	1551	1702	151	9.7	6.3	3110	3766	656	21.1	7.0
Mitsubishi	2270	1762	-508	-22.4	6.6	4171	3623	-548	-13.1	6.8
Jeep	1452	1740	288	19.8	6.5	2534	3382	848	33.5	6.3
Ford	1500	1372	-128	-8.5	5.1	2467	2621	154	6.2	4.9
Honda	165	1232	1067	646.7	4.6	416	2349	1933	464.7	4.4
Volks	668	706	38	5.7	2.6	1283	1633	350	27.3	3.1
L/Rover	708	645	-63	-8.9	2.4	1351	1472	121	9.0	2.8
BMW	478	784	306	64.0	2.9	998	1352	354	35.5	2.5
Audi	309	724	415	134.3	2.7	877	1310	433	49.4	2.5
KIA	491	594	103	21.0	2.2	992	1292	300	30.2	2.4
Suzuki	359	388	29	8.1	1.4	743	702	-41	-5.5	1.3
Volvo Car	353	264	-89	-25.2	1.0	669	577	-92	-13.8	1.1
Mercedes	62	236	174	280.6	0.9	122	549	427	350.0	1.0
Lexus	96	196	100	104.2	0.7	214	360	146	68.2	0.7
Great Wall	270	126	-144	-53.3	0.5	459	282	-177	-38.6	0.5
Other	512	651	139	27.1	2.4	943	1296	353	37.4	2.4
Total	23498	26834	3336	14.2	100.0	45662	53457	7795	17.1	100.0

February 2013 Light Commercial Nameplates										
	February Month					February Year To Date				
	Year		Difference		%	Year		Difference		%
	2012	2013	Volume	%	Share	2012	2013	Volume	%	Share
Toyota	3885	4734	849	21.9	26.7	6303	8582	2279	36.2	26.3
Nissan	2102	2753	651	31.0	15.5	3884	5288	1404	36.1	16.2
Ford	1333	2175	842	63.2	12.3	2401	4017	1616	67.3	12.3
Holden	1138	1609	471	41.4	9.1	2326	3612	1286	55.3	11.1
Mitsubishi	1398	2374	976	69.8	13.4	2545	3598	1053	41.4	11.0
Mazda	1071	1342	271	25.3	7.6	1631	2418	787	48.3	7.4
Isuzu Ute	640	801	161	25.2	4.5	1010	1461	451	44.7	4.5
Volks.	719	705	-14	-1.9	4.0	1154	1349	195	16.9	4.1
Great Wall	745	477	-268	-36.0	2.7	1424	978	-446	-31.3	3.0
Hyundai	546	441	-105	-19.2	2.5	994	831	-163	-16.4	2.5
Mercedes	97	66	-31	-32.0	0.4	138	127	-11	-8.0	0.4
Renault	40	61	21	52.5	0.3	85	109	24	28.2	0.3
Ssang.	35	51	16	45.7	0.3	65	93	28	43.1	0.3
Mits. Fuso	52	46	-6	-11.5	0.3	107	78	-29	-27.1	0.2
Suzuki	43	40	-3	-7.0	0.2	78	66	-12	-15.4	0.2
Citroen	26	10	-16	-61.5	0.1	43	26	-17	-39.5	0.1
Fiat	6	9	3	50.0	0.1	14	20	6	42.9	0.1
Peugeot	3	10	7	233.3	0.1	14	16	2	14.3	0.0
L/Rover	9	6	-3	-33.3	0.0	14	13	-1	-7.1	0.0
KIA	32	0	-32	-100.0	0.0	59	0	-59	-100.0	0.0
Proton	38		-38	-100.0	0.0	72	0	-72	-100.0	0.0
Total	13958	17710	3752	26.9	100.0	24361	32682	8321	34.2	100.0

February 2013 Heavy Truck Nameplates										
	February Month					February Year To Date				
	Year		Difference		%	Year		Difference		%
	2012	2013	Volume	%	Share	2012	2013	Volume	%	Share
Isuzu	522	461	-61	-11.7	19.7	919	984	65	7.1	23.4
Hino	333	354	21	6.3	15.2	597	596	-1	-0.2	14.1
Mits Fuso	229	270	41	17.9	11.6	381	474	93	24.4	11.2
Mercedes	240	188	-52	-21.7	8.0	422	358	-64	-15.2	8.5
K'worth	152	201	49	32.2	8.6	276	314	38	13.8	7.5
Volvo	90	106	16	17.8	4.5	168	205	37	22.0	4.9
Fiat	66	112	46	69.7	4.8	116	199	83	71.6	4.7
Iveco	121	137	16	13.2	5.9	228	196	-32	-14.0	4.7
W/Star	65	77	12	18.5	3.3	124	128	4	3.2	3.0
Volks.	53	72	19	35.8	3.1	121	126	5	4.1	3.0
Freightl.	34	65	31	91.2	2.8	49	115	66	134.7	2.7
Mack	77	70	-7	-9.1	3.0	107	104	-3	-2.8	2.5
Niss UD	94	57	-37	-39.4	2.4	94	90	-4	-4.3	2.1
Scania	49	39	-10	-20.4	1.7	65	68	3	4.6	1.6
Renault	31	35	4	12.9	1.5	47	66	19	40.4	1.6
Man	30	29	-1	-3.3	1.2	66	63	-3	-4.5	1.5
Daf	28	27	-1	-3.6	1.2	38	54	16	42.1	1.3
Ford	22	31	9	40.9	1.3	66	54	-12	-18.2	1.3
Caterpillar	23	1	-22	-95.7	0.0	40	8	-32	-80.0	0.2
Hyundai	13	0	-13	-100.0	0.0	26	0	-26	-100.0	0.0
Other	26	4	-22	-84.6	0.2	50	12	-38	-76.0	0.5
Total	2298	2336	38	1.7	100.0	4000	4214	214	5.4	100.0

Website: www.ataconsulting.com.au

Member contact details:

Autoteam Australia Consulting Pty Ltd
22 Withers Way
Eltham Vic 3095
T 0404 835 571 F 03 9444 0903
ajl@ataconsulting.com.au

Queensland

Rich & Co. Pty
28 Galway Street
Greenslopes Brisbane Qld 4120
T 07 3221 5045 M 0418 152 254

Vindico Partners
Level 13
241 Adelaide Street Brisbane Qld 4000
T 07 3225 3500 F 07 3225 3590

New South Wales

Auswild & Co
33 Rocky Point Road
Kogarah NSW 2217
T 02 9588 5511 F 02 9588 7865

Victoria

Colledge's
Unit 13 / 828 High Street
East Kew Vic 3102
T 03 9851 6500 F 03 9851 6555

LSA Partners Pty Ltd
121 Burwood Highway
Burwood Vic 3125
T 03 9830 6466 F 03 9830 6477

South Australia

George Pantahos & Co
248 Angas Street
Adelaide South Australia 5000
T 08 8223 7649 F 08 8223 7248

Graham Tull
147 Frome Street
Adelaide South Australia 5000
T 08 8223 1988 F 08 8223 6933