

**JULY 2011**

**VFACTS**

**REPORT**

**Prepared by Autoteam Australia  
Consulting**

This bulletin is issued by Autoteam Australia Consulting as a helpful guide to clients and for their private information only. It is regarded as confidential and not to be made available to any third party without prior Autoteam Australia Consulting approval.

**If you require further VFACTS information or analysis, please contact the author direct, Autoteam Australia Consulting, on [ajl@ataconsulting.com.au](mailto:ajl@ataconsulting.com.au).**

## **JULY 2011 VFACTS HIGHLIGHTS**

July 2011, the Automotive Industry in Australia achieved total vehicle sales of 80,991 units, down 1,385 units or 1.7% on July month 2010. The decrease in year over year sales volume is the ninth consecutive month for volume loss. July 2011 month represents the 4<sup>th</sup> best July month on record and on a Seasonally Adjusted Annual Rate, the industry came in at just 987,000 units.

The SUV Industry continues to defy the general industry trend and the July sales volume of 19,383 units represents a record July for SUV sales.

Interestingly, among all brands in the market place, Toyota continue to perform worst on a year over year basis. While the total industry was down 1,385 units for the month, Toyota incurred a volume loss of 4,270 units or 24.8% year on year. Toyota dealers are still suffering from reduced stock availability as a result of the tsunami in Japan in February. Unfortunately for Toyota dealers, much of the volume loss is in SUV and Light Commercial vehicles, models where dealers achieve the highest growth. It is expected that stock for Toyota dealers will be back to normal by late August or early September. On that basis we would expect aggressive market approach from Toyota for the remainder of the year.

In Australia most brands have been impacted to varying degrees as a result of the tsunami. Several brands have indicated that the impact on their vehicle availability

is minimal, while others have indicated that they will lose in excess of one month availability prior to year end. This will not be the loss of one month availability at the onetime, but a reduction of availability for several months through to year end.

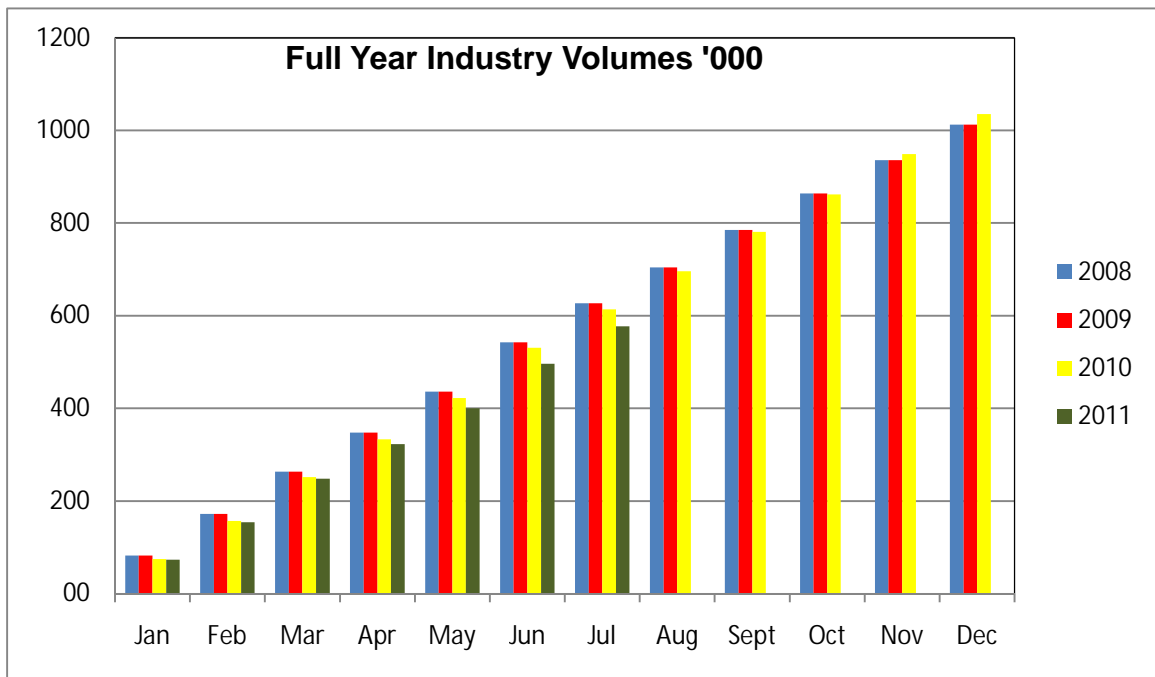
Prior to the Japanese tsunami, the average new vehicle dealer in Australia was carrying in excess of 60 days' supply of new vehicles. Presently the average dealers is carrying closer to 45-50 days' supply and this has had a positive impact on new vehicle gross. Dealers are achieving higher gross per vehicle retailed due to the tight stock situation.

Hopefully as dealer stock becomes more freely available, dealers are still able to maintain gross at the present higher level. As dealer inventory volume increases, gross per vehicle sold generally reduces. Key to dealer profitability and return on investment is greater turnover of stock.

With most dealers carrying less new vehicle inventory, Autoteam has seen an improvement in average dealer profitability over recent months. Excess dealer inventory is a major drain on dealer profitability. The cost to keep a new vehicle in inventory is approximately \$45 per day and to make matters worse, as a general rule, as inventory ages lower gross is generally achieved. As a general rule, lower inventory equals higher profit.

Over the recent period, manufacturer and dealer vehicle advertising and incentives has been at a lower than historical level. As stock increase and pressure to achieve aggressive manufacturer sales targets continues, we would expect the last quarter of 2011 to be driven by large marketing programs.

The most important criteria for vehicle sales is price. Consumer brand loyalty, especially in the price sensitive market segments, to a large degree does not exist today. These lower priced new vehicles are often sold at the expense of what July have historically been a used vehicle sale. Dealers must therefore constantly monitor the impact on used vehicle sales volumes and prices.



On a year to date basis, the Australian Automotive Industry has achieved total vehicle sales of 577,227 units, down 36,317 units or 5.9% on July 2010 year to date. On a SAAR basis, the total Vehicle Industry year to date industry is running at 989,000 units.

Autoteam Australia Consulting Vehicle Industry forecast for full year 2011 has been held at 1,000,000 units. For this level of sales to be achieved, the volume required for the remainder of the year will have to be 422,773 units, down just 743 units on the same time last year. On a SAAR basis, the industry will need to achieve 1,015,000 units for the remainder of the year. This will be the fourth time that the industry will have achieved sales in excess of 1,000,000 units.

July vehicle sales compared to history is as follows:

Record Vehicle Industry

	<u>July Month</u>	<u>July YTD</u>
Passenger	14 <sup>th</sup>	9 <sup>th</sup>
SUV	1 <sup>nd</sup>	2 <sup>nd</sup>
Light Commercial	6 <sup>th</sup>	3 <sup>th</sup>
Heavy Truck	11 <sup>th</sup>	10 <sup>th</sup>
Total Industry	4 <sup>th</sup>	5 <sup>th</sup>

## Industry Highlights

- The SUV and Heavy Truck industries both achieved year over year volume growth in July. Passenger Industry was down most at 1,890 units. July year to date all industry segments are down in sales volume compared to the same time 2010.
- Only the Light and Small Passenger Segments achieved year over year volume growth (23 units and 109 units respectively). These two segments collectively account for 67.8% of all passenger vehicle sales. The Medium (641 units) and Large Segments (816 units) continue to, and will continue to, lose most volume. These two passenger segments continue to lose sales volume and share as consumers desert the segments in preference of smaller, more fuel efficient vehicles. With rising fuel prices, Autoteam forecast that these industry segment will continue to lose sales volume and industry share into the future. Combined, the locally manufactured Commodore, Falcon and Aurion account for a total volume loss of 931 units for the month.

Within the SUV Industry, the Compact and Luxury Segments achieved year over year volume growth, up 347 units and 611 units respectively. Most volume loss in the Medium Segment was incurred by Kluger and Prado, down a combined 1,132 units (inventory availability). By comparison, the new Territory, with diesel availability, achieved sales of 1,445 units, the best for this model since 1,595 units was achieved in November 2007. The Compact Segment now accounts for 50.4% of all SUV vehicles sold year to date July.

Within the Light Commercial Industry, only the PU/CC 4X4 Segment achieved year over year volume growth. This segment of the industry now accounts for 56.4% of all Light Commercial vehicle sales.

- Among all states and territories, only Queensland and South Australia achieved year over year volume growth. Despite the continued economic growth (impacted by the mining industry), Western Australia was down most year on year, 1,139 units or 11.9%.
- By buyer type, only rental vehicle sales, which are very seasonal, achieved year over year volume growth, up 1,077 units or 27.4% on the same time last

year. Private vehicle sales were down most, 1,831 units or 4.7% for the month. This sales result is consistent with the lower than expected retail sales data for the month and also the lower level of consumer confidence, as measured by Westpac Consumer Survey.

- By fuel type, only diesel vehicle sales achieved year over year volume growth, up 1,415 units or 6.4% for the month. Part of this growth was driven by the new model Territory which now has diesel engine availability. Petrol powered vehicle sales were down 2,170 units or 3.7% for the month. LPG powered vehicles are now more freely available by the local manufacturers, Holden and Ford, and as such we would expect sales volume for these vehicles to increase over the coming months.
- Locally manufactured vehicle industry share for July accounted for 16.3%, up 1.9 pp on the same time last year and is a reflection of the Cruze now being locally manufactured. July year to date locally manufactured vehicles account for only 13.3% of all vehicle sales, but will increase over the coming months, again driven by the success Cruze sales. The locally manufactured vehicles share of the total vehicle industry for the traditional locally produced vehicles will continue to come down into the future as consumers desert this segment in preference for more fuel efficient imported vehicles. The introduction of Holden Cruze as a locally produced vehicle will provide some volume growth. The larger locally manufactured vehicles in this segment remain the vehicle of preference for government and large fleet sales.
- Toyota regained total vehicle market leadership in July after Holden had achieved it for the last two months. Holden is Passenger Industry leader, while Toyota maintained SUV and Light Commercial market leadership for July.  
Toyota achieved total vehicle sales of 12,980 units for a market share of 16%, ahead of Holden 10,819 units, Ford 7,769 units, Hyundai 7,226 units and Mazda 6,984 units.
- Commodore regained the title of the top selling vehicle for the month with July sales of 3,551 units, ahead of Mazda 3 (3,290 units) and HiLux (3,147 units).

### Top 10 Selling Vehicles

	<u>July Month</u>		<u>July Year To Date</u>	
	<u>Model</u>	<u>Volume</u>	<u>Model</u>	<u>Volume</u>
1	Commodore	3551	Commodore	24583
2	Mazda 3	3290	Mazda 3	24502
3	HiLux	3147	HiLux	21675
4	Cruze	3123	Cruze	19452
5	Corolla	2502	Corolla	18278
6	i30	2232	i30	17144
7	Falcon	1835	Navara	13598
8	Lancer	1539	Lancer	11379
9	Territory	1445	Getz	11151
10	Mazda 2	1421	Triton	10568

July 2011 Total Vehicle Industry										
	<u>July Month</u>					<u>July Year To Date</u>				
	<u>Year</u>		<u>Difference</u>		<u>%</u>	<u>Year</u>		<u>Difference</u>		<u>%</u>
	2010	2011	Volume	%	Share	2010	2011	Volume	%	Share
Pass	47591	45701	-1890	-4.0	56.5	351143	323179	-27964	-8.0	55.9
SUV	19032	19383	351	1.8	23.9	138377	134298	-4079	-2.9	23.3
Lt Com'l	13692	13463	-229	-1.7	16.6	107365	104213	-3152	-2.9	18.1
Hvy Trk	2061	2444	383	18.6	3.0	16659	15537	-1122	-6.7	2.7
<b>Total</b>	<b>82376</b>	<b>80991</b>	<b>-1385</b>	<b>-1.7</b>	<b>100.0</b>	<b>613544</b>	<b>577227</b>	<b>-36317</b>	<b>-5.9</b>	<b>100.0</b>

July 2011 Vehicle Segmentation										
	<u>July Month</u>					<u>July Year To Date</u>				
	<u>Year</u>		<u>Difference</u>		<u>%</u>	<u>Year</u>		<u>Difference</u>		<u>%</u>
	2010	2011	Volume	%	Share	2010	2011	Volume	%	Share
Light	10654	10677	23	0.2	23.4	80409	79026	-1383	-1.7	24.5
Small	19281	19390	109	0.6	42.4	143599	139263	-4336	-3.0	43.1
Medium	6901	6260	-641	-9.3	13.7	47942	42174	-5768	-12.0	13.0
Large	7888	7072	-816	-10.3	15.5	59237	46336	-12901	-21.8	14.3
Up Large	299	227	-72	-24.1	0.5	1947	1841	-106	-5.4	0.6
PM	1200	1013	-187	-15.6	2.2	7561	6554	-1007	-13.3	2.0
Sports	1368	1062	-306	-22.4	2.3	10448	7985	-2463	-23.6	2.5
<b>Pass.</b>	<b>47591</b>	<b>45701</b>	<b>-1890</b>	<b>-4.0</b>	<b>100.0</b>	<b>351143</b>	<b>323179</b>	<b>-27964</b>	<b>-8.0</b>	<b>100.0</b>
Compact	9442	9789	347	3.7	50.5	66356	67777	1421	2.1	50.4
Medium	6635	6149	-486	-7.3	31.7	50836	43457	-7379	-14.5	32.4
Large	968	847	-121	-12.5	4.4	7172	6609	-563	-7.8	4.9
Luxury	1987	2598	611	30.7	13.4	14013	16455	2442	17.4	12.3
<b>SUV</b>	<b>19032</b>	<b>19383</b>	<b>351</b>	<b>1.8</b>	<b>100.0</b>	<b>138377</b>	<b>134298</b>	<b>-4079</b>	<b>-2.9</b>	<b>100.0</b>
Light Bus	232	170	-62	-26.7	1.2	1453	1320	-133	-9.2	1.3
Van	1764	1586	-178	-10.1	11.8	14144	12205	-1939	-13.7	11.7
4X2	4849	4268	-581	-12.0	31.7	35742	31249	-4493	-12.6	30.0
4X4	6739	7378	639	9.5	54.8	55398	58822	3424	6.2	56.4
Light Trk	108	61	-47	-43.5	0.5	628	617	-11	-1.8	0.6
<b>Lt Com'l</b>	<b>13692</b>	<b>13463</b>	<b>-229</b>	<b>-1.7</b>	<b>100.0</b>	<b>107365</b>	<b>104213</b>	<b>-3152</b>	<b>-2.9</b>	<b>100.0</b>

July 2011 Sales By State										
	July Month					July Year To Date				
	Year		Difference		%	Year		Difference		%
	2010	2011	Volume	%	Share	2010	2011	Volume	%	Share
NSW	25038	24893	-145	-0.6	30.7	186036	179976	-6060	-3.3	31.2
Victoria	22499	21743	-756	-3.4	26.8	166395	153516	-12879	-7.7	26.6
Q'land	16516	17341	825	5.0	21.4	125645	121303	-4342	-3.5	21.0
Wst Aust	9572	8433	-1139	-11.9	10.4	69359	62354	-7005	-10.1	10.8
Sth Aust	5208	5255	47	0.9	6.5	39402	35841	-3561	-9.0	6.2
Tasmania	1304	1196	-108	-8.3	1.5	10688	9133	-1555	-14.5	1.6
ACT	1358	1330	-28	-2.1	1.6	9640	9068	-572	-5.9	1.6
NT	881	800	-81	-9.2	1.0	6379	6036	-343	-5.4	1.0
<b>Total</b>	<b>82376</b>	<b>80991</b>	<b>-1385</b>	<b>-1.7</b>	<b>100.0</b>	<b>613544</b>	<b>577227</b>	<b>-36317</b>	<b>-5.9</b>	<b>100.0</b>

July 2011 Sales By Buyer Type										
	July Month					July Year To Date				
	Year		Difference		%	Year		Difference		%
	2010	2011	Volume	%	Share	2010	2011	Volume	%	Share
Private	38562	36731	-1831	-4.7	45.4	293603	280369	-13234	-4.5	48.6
Business	34690	34509	-181	-0.5	42.6	254118	237297	-16821	-6.6	41.1
Gov't	5187	4737	-450	-8.7	5.8	37597	33605	-3992	-10.6	5.8
Rental	3937	5014	1077	27.4	6.2	28226	25956	-2270	-8.0	4.5
<b>Total</b>	<b>82376</b>	<b>80991</b>	<b>-1385</b>	<b>-1.7</b>	<b>100.0</b>	<b>613544</b>	<b>577227</b>	<b>-36317</b>	<b>-5.9</b>	<b>100.0</b>

July 2011 Sales By Fuel Type										
	July Month					July Year To Date				
	Year		Difference		%	Year		Difference		%
	2010	2011	Volume	%	Share	2010	2011	Volume	%	Share
Petrol	58925	56755	-2170	-3.7	70.1	434042	403028	-31014	-7.1	69.8
Diesel	22005	23420	1415	6.4	28.9	168706	167715	-991	-0.6	29.1
Hybrid	868	654	-214	-24.7	0.8	5437	4669	-768	-14.1	0.8
LPG	578	162	-416	-72.0	0.2	5359	1815	-3544	-66.1	0.3
<b>Total</b>	<b>82376</b>	<b>80991</b>	<b>-1385</b>	<b>-1.7</b>	<b>100.0</b>	<b>613544</b>	<b>577227</b>	<b>-36317</b>	<b>-5.9</b>	<b>100.0</b>

July 2011 Top 10 Production Locations										
	July Month					July Year To Date				
	Year		Difference		%	Year		Difference		%
	2010	2011	Volume	%	Share	2010	2011	Volume	%	Share
Holden	4988	7326	2338	46.9	9.0	34971	39803	4832	13.8	6.9
Ford	3835	3734	-101	-2.6	4.6	30548	21167	-9381	-30.7	3.7
Toyota	3065	2150	-915	-29.9	2.7	20567	15329	-5238	-25.5	2.7
Mitsubishi	0	0	0	N/A	0.0	1	0	-1	-100.0	0.0
Local	11888	13210	1322	11.1	16.3	86087	76299	-9788	-11.4	13.3
Japan	28918	25003	-3915	-13.5	30.9	213575	185739	-27836	-13.0	32.2
Thailand	12557	13385	828	6.6	16.5	96603	97135	532	0.6	16.8
Korea	12993	11330	-1663	-12.8	14.0	99658	89737	-9921	-10.0	15.5
Germany	6190	5198	-992	-16.0	6.4	46884	41020	-5864	-12.5	7.1
England	1210	1644	434	35.9	2.0	8709	11263	2554	29.3	2.0
South Afr.	1243	1474	231	18.6	1.8	9345	10065	720	7.7	1.7
USA	995	1523	528	53.1	1.9	7951	10047	2096	26.4	1.7
India	782	913	131	16.8	1.1	2489	6392	3903	156.8	1.1
China	584	818	234	40.1	1.0	3537	5451	1914	54.1	0.9
Other	5016	6493	1477	29.4	8.1	38706	44079	5373	13.9	7.7
<b>Total</b>	<b>82376</b>	<b>80991</b>	<b>-1385</b>	<b>-1.7</b>	<b>100.0</b>	<b>613544</b>	<b>577227</b>	<b>-36317</b>	<b>-5.9</b>	<b>100.0</b>

July 2011 Top 30 Nameplates										
	July Month					July Year To Date				
	Year		Difference		%	Year		Difference		%
	2010	2011	Volume	%	Share	2010	2011	Volume	%	Share
Toyota	17250	12980	-4270	-24.8	16.0	124720	98108	-26612	-21.3	17.0
Holden	10647	10819	172	1.6	13.4	79305	73389	-5916	-7.5	12.7
Ford	7375	7769	394	5.3	9.6	56571	52993	-3578	-6.3	9.2
Mazda	7374	6984	-390	-5.3	8.6	50245	50780	535	1.1	8.8
Hyundai	6531	7226	695	10.6	8.9	48902	50204	1302	2.7	8.7
Nissan	4646	5207	561	12.1	6.4	37476	39180	1704	4.5	6.8
Mitsubishi	5029	4972	-57	-1.1	6.1	37401	36458	-943	-2.5	6.3
Volks.	2922	3428	506	17.3	4.2	22228	23933	1705	7.7	4.1
Subaru	3253	3022	-231	-7.1	3.7	24362	21667	-2695	-11.1	3.8
Honda	3150	3257	107	3.4	4.0	25355	19610	-5745	-22.7	3.4
KIA	1834	1865	31	1.7	2.3	14264	14701	437	3.1	2.5
Suzuki	2004	1660	-344	-17.2	2.0	14331	14497	166	1.2	2.5
Mercedes	1567	1773	206	13.1	2.2	12533	11645	-888	-7.1	2.0
BMW	1533	1343	-190	-12.4	1.7	10318	9804	-514	-5.0	1.7
Audi	1026	1050	24	2.3	1.3	8251	9024	773	9.4	1.6
Great Wall	584	657	73	12.5	0.8	3537	4555	1018	28.8	0.8
Jeep	409	588	179	43.8	0.7	3540	4217	677	19.1	0.7
Isuzu	555	631	76	13.7	0.8	4329	3698	-631	-14.6	0.6
Isuzu Ute	425	490	65	15.3	0.6	2775	3561	786	28.3	0.6
L/Rover	409	505	96	23.5	0.6	2891	3451	560	19.4	0.6
Lexus	494	461	-33	-6.7	0.6	3772	3331	-441	-11.7	0.6
Peugeot	449	401	-48	-10.7	0.5	3452	3280	-172	-5.0	0.6
Volvo Car	334	462	128	38.3	0.6	2766	3244	478	17.3	0.6
Hino	311	290	-21	-6.8	0.4	2426	2031	-395	-16.3	0.4
Mits Fuso	315	363	48	15.2	0.4	2261	2026	-235	-10.4	0.4
Renault	141	303	162	114.9	0.4	1000	1808	808	80.8	0.3
Mini	147	226	79	53.7	0.3	1380	1248	-132	-9.6	0.2
Dodge	144	234	90	62.5	0.3	869	1221	352	40.5	0.2
Proton	146	118	-28	-19.2	0.1	1128	945	-183	-16.2	0.2
Kenworth	76	127	51	67.1	0.2	1207	886	-321	-26.6	0.2
Other	1296	1780	484	37.3	6.1	9949	11732	1783	17.9	5.6
<b>Total</b>	<b>82376</b>	<b>80991</b>	<b>-1385</b>	<b>-1.7</b>	<b>100.0</b>	<b>613544</b>	<b>577227</b>	<b>-36317</b>	<b>-5.9</b>	<b>100.0</b>

July 2011 Top 20 Passenger Nameplates										
	July Month					July Year To Date				
	Year		Difference		%	Year		Difference		%
	2010	2011	Volume	%	Share	2010	2011	Volume	%	Share
Holden	7373	7871	498	6.8	17.2	53970	52374	-1596	-3.0	16.2
Toyota	8560	5935	-2625	-30.7	13.0	58701	44046	-14655	-25.0	13.6
Mazda	5457	5203	-254	-4.7	11.4	36805	38105	1300	3.5	11.8
Hyundai	4803	5174	371	7.7	11.3	36686	37055	369	1.0	11.5
Ford	4241	4249	8	0.2	9.3	33390	29489	-3901	-11.7	9.1
Volks.	2254	2384	130	5.8	5.2	15132	17391	2259	14.9	5.4
Honda	2678	2614	-64	-2.4	5.7	21028	15865	-5163	-24.6	4.9
Suzuki	1620	1419	-201	-12.4	3.1	11406	12079	673	5.9	3.7
Mitsubishi	2250	1623	-627	-27.9	3.6	15694	12012	-3682	-23.5	3.7
KIA	1418	1337	-81	-5.7	2.9	11118	11091	-27	-0.2	3.4
Subaru	1314	1351	37	2.8	3.0	11191	10355	-836	-7.5	3.2
Nissan	1043	1572	529	50.7	3.4	10466	8578	-1888	-18.0	2.7
Mercedes	1090	1151	61	5.6	2.5	8566	7570	-996	-11.6	2.3
Audi	753	742	-11	-1.5	1.6	6036	6367	331	5.5	2.0
BMW	971	707	-264	-27.2	1.5	7039	5689	-1350	-19.2	1.8
Peugeot	372	383	11	3.0	0.8	3016	2937	-79	-2.6	0.9
Lexus	269	353	84	31.2	0.8	2194	2356	162	7.4	0.7
Volvo Car	94	225	131	139.4	0.5	894	1256	362	40.5	0.4
Mini	147	174	27	18.4	0.4	1380	988	-392	-28.4	0.3
Proton	122	100	-22	-18.0	0.2	928	695	-233	-25.1	0.2
Other	762	1134	372	48.8	2.6	5503	6881	1378	25.0	2.2
<b>Total</b>	<b>47591</b>	<b>45701</b>	<b>-1890</b>	<b>-4.0</b>	<b>100.0</b>	<b>351143</b>	<b>323179</b>	<b>-27964</b>	<b>-8.0</b>	<b>100.0</b>

July 2011 Top 20 SUV Nameplates										
	July Month					July Year To Date				
	Year		Difference		%	Year		Difference		%
	2010	2011	Volume	%	Share	2010	2011	Volume	%	Share
Toyota	4279	2889	-1390	-32.5	14.9	31259	24327	-6932	-22.2	18.1
Nissan	2158	2234	76	3.5	11.5	13522	16119	2597	19.2	12.0
Mitsubishi	1544	2189	645	41.8	11.3	11037	13360	2323	21.0	9.9
Subaru	1939	1671	-268	-13.8	8.6	13171	11312	-1859	-14.1	8.4
Hyundai	1255	1413	158	12.6	7.3	8420	9245	825	9.8	6.9
Ford	1113	1620	507	45.6	8.4	8297	8323	26	0.3	6.2
Holden	1212	1083	-129	-10.6	5.6	9584	8183	-1401	-14.6	6.1
Mazda	1134	959	-175	-15.4	4.9	8212	6828	-1384	-16.9	5.1
Jeep	409	588	179	43.8	3.0	3540	4217	677	19.1	3.1
BMW	562	636	74	13.2	3.3	3279	4115	836	25.5	3.1
Honda	472	643	171	36.2	3.3	4327	3745	-582	-13.5	2.8
L/Rover	391	498	107	27.4	2.6	2760	3379	619	22.4	2.5
Volks	344	646	302	87.8	3.3	4511	3367	-1144	-25.4	2.5
KIA	381	496	115	30.2	2.6	2837	3327	490	17.3	2.5
Audi	273	308	35	12.8	1.6	2215	2657	442	20.0	2.0
Suzuki	362	222	-140	-38.7	1.1	2777	2241	-536	-19.3	1.7
Volvo Car	240	237	-3	-1.3	1.2	1872	1988	116	6.2	1.5
Great Wall	285	251	-34	-11.9	1.3	1899	1888	-11	-0.6	1.4
Mercedes	185	214	29	15.7	1.1	1718	1743	25	1.5	1.3
Lexus	225	108	-117	-52.0	0.6	1578	975	-603	-38.2	0.7
Other	269	478	209	77.7	2.5	1562	2959	1397	89.4	2.2
<b>Total</b>	<b>19032</b>	<b>19383</b>	<b>351</b>	<b>1.8</b>	<b>100.0</b>	<b>138377</b>	<b>134298</b>	<b>-4079</b>	<b>-2.9</b>	<b>100.0</b>

July 2011 Light Commercial Nameplates										
	July Month					July Year To Date				
	Year		Difference		%	Year		Difference		%
	2010	2011	Volume	%	Share	2010	2011	Volume	%	Share
Toyota	4383	4136	-247	-5.6	30.7	34543	29546	-4997	-14.5	28.4
Ford	2021	1900	-121	-6.0	14.1	14884	15181	297	2.0	14.6
Nissan	1445	1401	-44	-3.0	10.4	13488	14483	995	7.4	13.9
Holden	2063	1865	-198	-9.6	13.9	15751	12832	-2919	-18.5	12.3
Mitsubishi	1235	1160	-75	-6.1	8.6	10670	11077	407	3.8	10.6
Mazda	783	822	39	5.0	6.1	5228	5847	619	11.8	5.6
Hyundai	473	639	166	35.1	4.7	3796	3904	108	2.8	3.7
Isuzu Ute	425	490	65	15.3	3.6	2775	3561	786	28.3	3.4
Volks.	229	355	126	55.0	2.6	2217	2855	638	28.8	2.7
Great Wall	299	406	107	35.8	3.0	1638	2667	1029	62.8	2.6
Mercedes	75	91	16	21.3	0.7	631	554	-77	-12.2	0.5
Ssang.	61	36	-25	-41.0	0.3	380	351	-29	-7.6	0.3
KIA	35	32	-3	-8.6	0.2	309	283	-26	-8.4	0.3
Renault	3	46	43	1433.3	0.3	88	283	195	221.6	0.3
Proton	24	18	-6	-25.0	0.1	200	250	50	25.0	0.2
Suzuki	22	19	-3	-13.6	0.1	148	177	29	19.6	0.2
Citroen	45	12	-33	-73.3	0.1	240	118	-122	-50.8	0.1
Peugeot	41	17	-24	-58.5	0.1	135	101	-34	-25.2	0.1
L/Rover	18	7	-11	-61.1	0.1	131	72	-59	-45.0	0.1
Fiat	12	11	-1	-8.3	0.1	113	71	-42	-37.2	0.1
<b>Total</b>	<b>13692</b>	<b>13463</b>	<b>-229</b>	<b>-1.7</b>	<b>100.0</b>	<b>107365</b>	<b>104213</b>	<b>-3152</b>	<b>-2.9</b>	<b>100.0</b>

July 2011 Heavy Truck Nameplates										
	July Month					July Year To Date				
	Year		Difference		%	Year		Difference		%
	2010	2011	Volume	%	Share	2010	2011	Volume	%	Share
Isuzu	555	631	76	13.7	25.8	4329	3698	-631	-14.6	23.8
Hino	311	290	-21	-6.8	11.9	2426	2031	-395	-16.3	13.1
Mits Fuso	315	363	48	15.2	14.9	2261	2026	-235	-10.4	13.0
Mercedes	217	317	100	46.1	13.0	1618	1778	160	9.9	11.4
Iveco	87	137	50	57.5	5.6	837	932	95	11.4	6.0
K'worth	76	127	51	67.1	5.2	1207	886	-321	-26.6	5.7
Volvo	63	92	29	46.0	3.8	568	540	-28	-4.9	3.5
Niss UD	67	61	-6	-9.0	2.5	441	538	97	22.0	3.5
W/Star	40	74	34	85.0	3.0	474	531	57	12.0	3.4
Fiat	71	73	2	2.8	3.0	491	497	6	1.2	3.2
Freightl.	25	63	38	152.0	2.6	377	427	50	13.3	2.7
Mack	35	53	18	51.4	2.2	396	419	23	5.8	2.7
Volks.	95	43	-52	-54.7	1.8	368	330	-38	-10.3	2.1
Scania	29	35	6	20.7	1.4	205	229	24	11.7	1.5
Toyota	28	20	-8	-28.6	0.8	217	189	-28	-12.9	1.2
Man	18	22	4	22.2	0.9	161	157	-4	-2.5	1.0
Hyundai	0	14	14	N/A	0.6	0	82	82	N/A	0.5
Daf	10	7	-3	-30.0	0.3	140	75	-65	-46.4	0.5
Caterpillar	0	10	10	N/A	0.4	0	50	50	N/A	0.3
Renault	14	1	-13	-92.9	0.0	81	33	-48	-59.3	0.2
Other	5	11	6	-339.3	0.3	62	89	27	43.5	3.6
<b>Total</b>	<b>2061</b>	<b>2444</b>	<b>383</b>	<b>18.6</b>	<b>100.0</b>	<b>16659</b>	<b>15537</b>	<b>-1122</b>	<b>-6.7</b>	<b>100.0</b>

# AutoTeamAustralia

**Website:** [www.ataconsulting.com.au](http://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  
Level 3, Waterfront Place  
1 Eagle Street, Brisbane Qld 4000  
T 07 3229 0080 F 07 3229 2549

Vindico Partners  
Level 3  
145 Eagle 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