# SEPTEMBER VFACTS REPORT

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# SEPTEMBER 2012 VFACTS HIGHLIGHTS

September 2012, the Automotive Industry in Australia achieved total vehicle sales of 94,627 units, up 7,808 units or 9% on September month 2011. September 2012 retail sales volume represents the best September sales month on record, and, on a Seasonally Adjusted Annual Rate, the industry for September 2012 came in at 1,148,000 units, the fourth best monthly SAAR ever recorded. The Vehicle Industry has now achieved a SAAR of in excess of 1,000,000 units in each of the past thirteen months. The September sales volume was again driven by increased SUV and Light Commercial vehicle availability with the segments up 20.7% and 10.7% respectively. Both Industry segments will achieve record full year sales volume for 2012, as will the total vehicle market. We see more manufacturers and products released into theses two industry segments with those manufacturers with strong representation in these industries achieving greatest volume growth for the month and they will continue to into the future as the makeup of the Australian Automotive Industry continues to change.

The manufacturer advertising of these vehicles, off road driving, different lifestyle, versatility, etc., has proved successful as vehicle purchasers are deserting the Passenger Industry in favour of these products. SUV and Light Commercial 4X4 sales offer the retail customer the perceived advantages of a different lifestyle and are largely at the expense of what several years back would have been a passenger, probably wagon, vehicle sale. The traditional wagon as we knew it is just about gone from the market with only a few manufacturers offering this derivative. Most manufacturers are investing heavily in R&D in this industry segments in recognition of the change in consumer vehicle preferences.

The Australian consumers love affair with motor vehicles continues to blossom. The most recent global data available shows that for every one thousand people in Australia, there were 730 registered vehicles. Taking out those people that are not of a driving age, this would result in more than one vehicle per every person in Australia. In terms of global ranking for vehicles per head of population, Australia ranks sixth behind Monaco, USA, Liechtenstein, Luxembourg and Malta. With continued Australian vehicle sales growth and low scrappage levels, we forecast that the ratio for Australia will increase into the future.

Mazda achieved an all time monthly sales record with 10,093 units retailed. This represents growth of 4,056 units or 67.2% on September 2011. A driving force behind this result was the Mazda “M Day Sale” which was in September 2012 compared to August 2011. In addition, Mazda retailed 1,809 CX-5 units to be the top selling SUV for the month again. This product has been largely incremental to the Mazda brand since introduction earlier in the year.

Manufacturers have continued with “finance offer” marketing incentives in the market and generally the programs have proved successful. Over recent months we have seen a growth in this type of incentive from manufacturers, and will continue to, and this is growing industry sales volume.

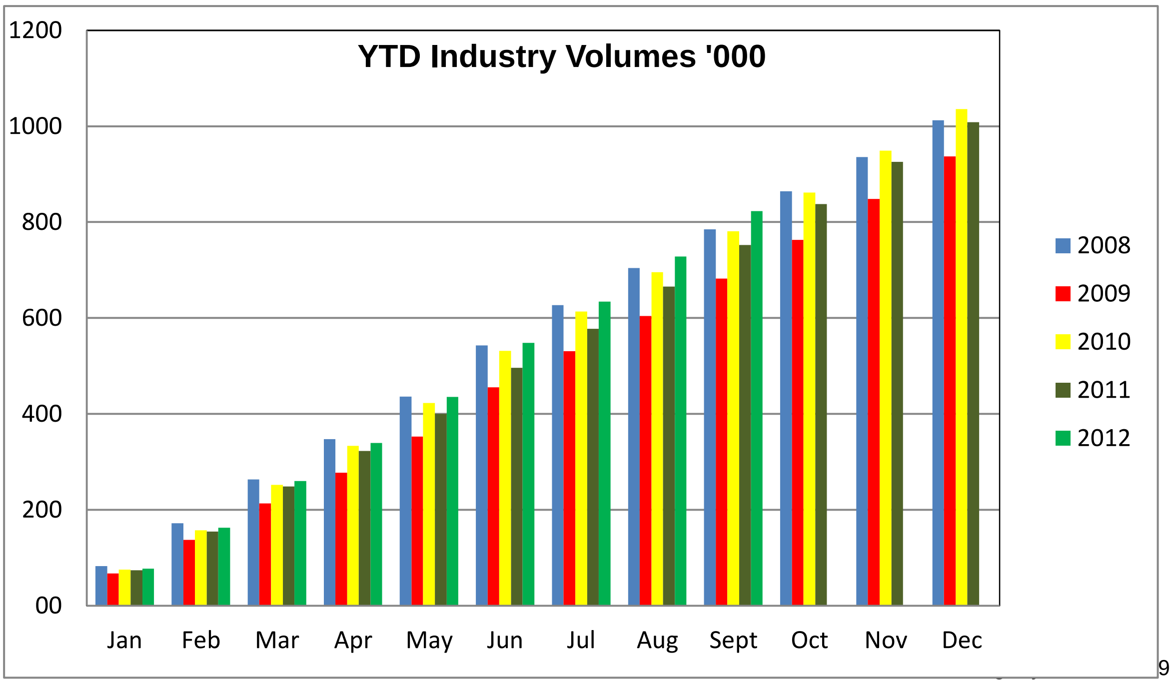
The concern for the dealer body with these incentives is that it attacks the average dealer’s major profit department, the Finance and Insurance Department. Dealers may very well be financing more vehicles as a result but the income generated per vehicle is substantially reduced as they reduce margins to achieve manufacturer targets. The offset may be that the dealer is retaining more gross up front, however, the net result would be lower profit overall for dealers. The ‘finance offers” from manufacturers are here to stay and the dealer body must recognise this in their business planning and make the appropriate changes to their operating procedures.

The industry is still impacted by the drive by manufacturers to achieve sales volume and as such we continue to see more “cyber” cars reported (vehicles reported as retails but not sold to an end user). Autoteam knows of at least one manufacturer who contacted dealers on Sunday 30 September to report vehicle retails (pre RDA) in order to achieve its sales target for the month.

September year to date, the Total Vehicle Industry has achieved vehicle sales of 822,674 units, up 70,546 units or 9.4% on the same time last year. September year to date 2012 represents the best September year to date on record. September year to date the Automotive Industry is running at a SAAR of 1,099,000 units.

Autoteam Australia Consulting forecast for the total vehicle industry for 2012 is 1,100,000 units, which compares to the present industry record of 1,049,982 units achieved in 2007.

While new vehicle sales are at record level, net profit in the New Vehicle Department net profit is almost at a record loss. On a fully accounted basis, the majority of dealers around Australia are running at a loss in the New Vehicle Department. The push to achieve sales targets and market share, with the associated bonuses, and carrying too much stock has impacted dealer profitability in this department. This approach has been successful for the franchises in achieving sales volume but it has not transferred into dealership profitability. A different operating model needs to be developed to return dealership New Vehicle Departments to profit or breakeven at a minimum.



With the makeup of the vehicle Passenger Industry changing and the continued growth in the SUV and Light Commercial 4X4 industries, those brands with new and desirable products in these industry segment will continue to achieve volume and share growth. Relying on the same old products to achieve sales volume and market share will not work in the future as consumer preferences have and will continue to change. The industry is dynamic with the consumer wanting the latest and best 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. The SUV and Light Commercial Industries will both achieve full year record sales volumes for 2012, up significantly on prior year volumes.

September vehicle sales compared to history is as follows:

Record Vehicle Industry

| | September Month | September YTD |
|---|---|---|
| Passenger | 6th | 9th |
| SUV | 1st | 1st |
| Light Commercial | 1st | 1st |
| Heavy Truck | 5th | 5th |
| Total Industry | 1st | 1st |

Industry Highlights

- Among the top 30 brands in the market place September year to date, only Holden, Ford, Mitsubishi, Suzuki and Audi are down in sales volume year over year. By comparison, Toyota, Volkswagen, KIA, Jeep (117.1%), Great Wall, Land Rover and Isuzu Ute have all achieved year over year volume growth of in excess of 20%. In September we have seen a new entrant in the market place, with Opel recording sales of 174 units. This bring to 68 the total number of manufacturers represented in the Australian Automotive Industry.
- All Industry segments achieved growth year over year for September with the SUV Segment up most at 20.7%. The SUV Industry September year to date accounts for

27.8% of total vehicle sales, compared to 23.6% the same time last year. This share growth has come from the Passenger Segment which is down 4 percentage points from the same time last year. The Medium Segment of the SUV Industry achieved greatest volume growth of any segment, up 2,173 units or 36.9% on the same time last year. September year to date the Passenger Industry accounts for 51.7% of all vehicles sold which compares to 55.7% the same time last year. The Large Passenger Segment for September was down 1,984 units or 27.5% compared to the same month last year (Commodore down 1,180 units and Falcon 520 units). It is just a matter of time before production of these two products, as unique Australian vehicles, ceases. The growth in the SUV and Light Commercial Segments is a reflection of increased stock availability following the Japanese tsunami and Thailand floods over the past 12 to 18 months. The Heavy Truck Industry again achieved volume growth of 304 units or 12.4% year on year.

- Among the Passenger Industry, the Medium, Large and People Mover Segments all incurred volume loss, down 98 units, 1,984 units and 9 units respectively. By comparison the Light Segment was up 1,628 units (Mazda 2 up 567 units and Rio up 429 units), and the Small Segment was up 1,474 units (Mazda 3 up 1,573 units, Focus up 866 units and i30 up 651 units). Offsetting these volume gains were losses for Corolla and Cruze. The new Chrysler 300C (up 172 units) provided volume growth for the Upper Large Segment. The Sports Segment achieved 35.6% year on year volume growth, with new models Veloster (328 units) and Subaru BRZ/Toyota 86 (combined 151 units).
- The Upper Large Segment was again the only segment in the SUV Industry to incur a volume loss year over year, down 99 units or 8.3%, with Landcruiser down 74 units for the month. The Compact Segment achieved growth of 1,308 units (Compass up 202 units, Subaru XV up 698 units and Audi Q3 up 295 units), Medium Segment was up 2,173 units (CX-5 was up 1,809), Large Segment was up 919 units (Grand Cherokee up 436 units and Prado up 406 units).
- The PU/CC 4X4 Segment achieved year on year growth of 2,128 units or 23.9% with most models up year on year, but Triton up 870 units and Colorado up 439 units, up the most. Increased stock availability from Thailand has assisted in achieving the industry growth for the month. Many of these vehicles may have been sold in prior months but because of availability were not able to be delivered until September.

- Among the states and territories for the month of September, only South Australia was down in sales volume year on year, 32 units or 0.5%. Western Australia, ACT, Victoria and Tasmania all achieved year over year growth of in excess of 10%. For Tasmania this is a welcome relief as its industry volumes have been coming down year over year for a long period of time. September year to date, only Tasmania's Vehicle Industry is down on the same time last year, while Queensland, Western Australia and the ACT are all up in excess of 10%.
- By buyer type, retail and business sales both achieved year over year sales volume growth. Private vehicle sales were up 15.8% for the month and account for 48.7% of all vehicle sales September year to date. September year to date only Government sales are down year on year, 4,673 units or 1.6%, a reflection of all governments fiscal policies.
- By fuel type, petrol vehicle sales continue to lose industry share and while they achieved year over year growth, it was less than achieved for the total industry. Hybrid (65.1%) and LPG (24.6%) sales were up most year over year, although both off a small volume base. Diesel vehicle sales (predominantly SUV and Light Commercial vehicles) were up 5,214 units or 20.2% for the month and year to date account for 32.2% of all vehicles sold.
- Locally manufactured vehicle industry share for September accounted for just 11.7% of the total industry volume. All three local manufacturers were down in sales volume for the month (Holden 2,724 units, Ford 1,040 units and Toyota 2 units). 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 September. Toyota achieved total September vehicle sales volume of 17,300 units for a market share of 18.3%, ahead of Mazda 10,093 units, Holden 8,955 units, Hyundai 7,815 units, Ford 7,764 units and Nissan 6,228 units.
- Mazda 3 was the top selling vehicle for the month of September with sales of 4,276 units, ahead of HiLux and i30. On a year to date basis, Mazda 3 remains the top selling vehicle in the market place, ahead of HiLux and Corolla.

# Top 10 Selling Vehicles

| | September Month | | September Year To Date | |
|---|---|---|---|---|
| | Model | Volume | Model | Volume |
| 1 | Mazda 2 | 4276 | Mazda 3 | 32434 |
| 2 | HiLux | 3479 | HiLux | 31064 |
| 3 | i30 | 3144 | Corolla | 28089 |
| 4 | Corolla | 3133 | Commodore | 23226 |
| 5 | Commodore | 2532 | Cruze | 22891 |
| 6 | Triton | 2326 | i30 | 21314 |
| 7 | Camry | 2267 | Navara | 19173 |
| 8 | Cruze | 1951 | Camry | 17120 |
| 9 | Navara | 1812 | Triton | 14314 |
| 10 | CX-5 | 1809 | Yaris | 14165 |

## September 2012 Total Vehicle Industry

| | September Month | | | | | September Year To Date | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | Year | | Difference | | % | Year | | Difference | | % |
| | 2011 | 2012 | Volume | % | Share | 2011 | 2012 | Volume | % | Share |
| Pass | 47700 | 49210 | 1510 | 3.2 | 52.0 | 419302 | 425294 | 5992 | 1.4 | 51.7 |
| SUV | 20778 | 25079 | 4301 | 20.7 | 26.5 | 177187 | 228395 | 51208 | 28.9 | 27.8 |
| Lt Com'l | 15896 | 17589 | 1693 | 10.7 | 18.6 | 134910 | 146534 | 11624 | 8.6 | 17.8 |
| Hvy Trk | 2445 | 2749 | 304 | 12.4 | 2.9 | 20729 | 22451 | 1722 | 8.3 | 2.7 |
| Total | 86819 | 94627 | 7808 | 9.0 | 100.0 | 752128 | 822674 | 70546 | 9.4 | 100.0 |

## September 2012 Vehicle Segmentation

| | September Month | | | | | September Year To Date | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | Year | | Difference | | % | Year | | Difference | | % |
| | 2011 | 2012 | Volume | % | Share | 2011 | 2012 | Volume | % | Share |
| Light | 9620 | 11248 | 1628 | 16.9 | 22.8 | 99829 | 102234 | 2405 | 2.4 | 23.9 |
| Small | 21092 | 22566 | 1474 | 7.0 | 45.9 | 181465 | 186579 | 5114 | 2.8 | 43.9 |
| Medium | 7356 | 7258 | -98 | -1.3 | 14.7 | 56222 | 63377 | 7155 | 12.7 | 14.9 |
| Large | 7212 | 5228 | -1984 | -27.5 | 10.6 | 60557 | 46347 | -14210 | -23.5 | 10.9 |
| Up Large | 265 | 325 | 60 | 22.6 | 0.7 | 2353 | 2022 | -331 | -14.1 | 0.5 |
| PM | 921 | 912 | -9 | -1.0 | 1.9 | 8483 | 8753 | 270 | 3.2 | 2.1 |
| Sports | 1234 | 1673 | 439 | 35.6 | 3.4 | 10393 | 15982 | 5589 | 53.8 | 3.8 |
| Pass. | 47700 | 49210 | 1510 | 3.2 | 100.0 | 419302 | 425294 | 5992 | 1.4 | 100.0 |
| Small | 3671 | 4979 | 1308 | 35.6 | 19.8 | 29094 | 46039 | 16945 | 58.2 | 20.2 |
| Medium | 7085 | 9258 | 2173 | 30.7 | 36.9 | 65763 | 81403 | 15640 | 23.8 | 35.6 |
| Large | 8828 | 9747 | 919 | 10.4 | 38.9 | 72631 | 89711 | 17080 | 23.5 | 39.3 |
| Up Large | 1194 | 1095 | -99 | -8.3 | 4.4 | 9699 | 11242 | 1543 | 15.9 | 4.9 |
| SUV | 20778 | 25079 | 4301 | 20.7 | 100.0 | 177187 | 228395 | 51208 | 28.9 | 100.0 |
| Bus <20 Seat | 378 | 249 | -129 | -34.1 | 1.4 | 2050 | 2278 | 228 | 11.1 | 1.6 |
| Bus >20 Seat | 73 | 70 | -3 | -4.1 | 0.4 | 554 | 779 | 225 | 40.6 | 0.5 |
| V/CC <2.5T | 224 | 244 | 20 | 8.9 | 1.4 | 2299 | 2506 | 207 | 9.0 | 1.7 |
| V/CC >2.5T | 1603 | 1335 | -268 | -16.7 | 7.6 | 13465 | 13377 | -88 | -0.7 | 9.1 |
| PU/CC 4X2 | 4717 | 4662 | -55 | -1.2 | 26.5 | 40552 | 36314 | -4238 | -10.5 | 24.8 |
| PU/CC 4X4 | 8901 | 11029 | 2128 | 23.9 | 62.7 | 75990 | 91280 | 15290 | 20.1 | 62.3 |
| Lt Com'l | 15896 | 17589 | 1693 | 10.7 | 100.0 | 134910 | 146534 | 11624 | 8.6 | 100.0 |

| September 2012 Sales By State | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | September Month | | | | | September Year To Date | | | | |
| | Year | | Difference | | % | Year | | Difference | | % |
| | 2011 | 2012 | Volume | % | Share | 2011 | 2012 | Volume | % | Share |
| NSW | 26661 | 28854 | 2193 | 8.2 | 30.5 | 233911 | 253772 | 19861 | 8.5 | 30.8 |
| Victoria | 22845 | 25263 | 2418 | 10.6 | 26.7 | 199797 | 216722 | 16925 | 8.5 | 26.3 |
| Q'land | 18040 | 19579 | 1539 | 8.5 | 20.7 | 157641 | 174939 | 17298 | 11.0 | 21.3 |
| Wst Aust | 9731 | 11054 | 1323 | 13.6 | 11.7 | 81988 | 94087 | 12099 | 14.8 | 11.4 |
| Sth Aust | 5853 | 5821 | -32 | -0.5 | 6.2 | 47140 | 49862 | 2722 | 5.8 | 6.1 |
| ACT | 1314 | 1487 | 173 | 13.2 | 1.6 | 11724 | 12858 | 1134 | 9.7 | 1.6 |
| Tasmania | 1494 | 1651 | 157 | 10.5 | 1.7 | 12208 | 11582 | -626 | -5.1 | 1.4 |
| NT | 881 | 918 | 37 | 4.2 | 1.0 | 7719 | 8852 | 1133 | 14.7 | 1.1 |
| Total | 86819 | 94627 | 7808 | 9.0 | 100.0 | 752128 | 822674 | 70546 | 9.4 | 100.0 |

| September 2012 Sales By Buyer Type | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | September Month | | | | | September Year To Date | | | | |
| | Year | | Difference | | % | Year | | Difference | | % |
| | 2011 | 2012 | Volume | % | Share | 2011 | 2012 | Volume | % | Share |
| Private | 37488 | 43429 | 5941 | 15.8 | 45.9 | 360348 | 400773 | 40425 | 11.2 | 48.7 |
| Business | 37291 | 40987 | 3696 | 9.9 | 43.3 | 309036 | 339688 | 30652 | 9.9 | 41.3 |
| Rental | 6972 | 6024 | -948 | -13.6 | 6.4 | 38755 | 42897 | 4142 | 10.7 | 5.2 |
| Govt | 5068 | 4187 | -881 | -17.4 | 4.4 | 43989 | 39316 | -4673 | -10.6 | 4.8 |
| Total | 86819 | 94627 | 7808 | 9.0 | 100.0 | 752128 | 822674 | 70546 | 9.4 | 100.0 |

| September 2012 Sales By Fuel Type | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | September Month | | | | | September Year To Date | | | | |
| | Year | | Difference | | % | Year | | Difference | | % |
| | 2011 | 2012 | Volume | % | Share | 2011 | 2012 | Volume | % | Share |
| Petrol | 59935 | 61961 | 2026 | 3.4 | 65.4 | 524654 | 543439 | 18785 | 3.6 | 66.0 |
| Diesel | 25784 | 30998 | 5214 | 20.2 | 32.8 | 219022 | 265100 | 46078 | 21.0 | 32.2 |
| Hybrid | 734 | 1212 | 478 | 65.1 | 1.3 | 6178 | 9539 | 3361 | 54.4 | 1.2 |
| LPG | 366 | 456 | 90 | 24.6 | 0.5 | 2274 | 4596 | 2322 | 102.1 | 0.6 |
| Total | 86819 | 94627 | 7808 | 9.0 | 100.0 | 752128 | 822674 | 70546 | 9.4 | 100.0 |

| September 2012 Top 10 Production Locations | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | September Month | | | | | September Year To Date | | | | |
| | Year | | Difference | | % | Year | | Difference | | % |
| | 2011 | 2012 | Volume | % | Share | 2011 | 2012 | Volume | % | Share |
| Holden | 7892 | 5168 | -2724 | -34.5 | 5.5 | 55548 | 53353 | -2195 | -4.0 | 6.5 |
| Ford | 3855 | 2815 | -1040 | -27.0 | 3.0 | 28905 | 25981 | -2924 | -10.1 | 3.2 |
| Toyota | 2990 | 2988 | -2 | -0.1 | 3.2 | 20774 | 22997 | 2223 | 10.7 | 2.8 |
| Local | 14737 | 10971 | -3766 | -25.6 | 11.7 | 105227 | 102331 | -2896 | -2.8 | 12.5 |
| | | | | | | | | | | |
| Japan | 27450 | 31947 | 4497 | 16.4 | 33.8 | 243488 | 295731 | 52243 | 21.5 | 35.9 |
| Thailand | 12775 | 17100 | 4325 | 33.9 | 18.1 | 122428 | 118070 | -4358 | -3.6 | 14.4 |
| Korea | 11043 | 11986 | 943 | 8.5 | 12.7 | 111994 | 109697 | -2297 | -2.1 | 13.3 |
| Germany | 7045 | 6922 | -123 | -1.7 | 7.3 | 54689 | 66600 | 11911 | 21.8 | 8.1 |
| England | 1768 | 2170 | 402 | 22.7 | 2.3 | 14363 | 19108 | 4745 | 33.0 | 2.3 |
| USA | 2169 | 2525 | 356 | 16.4 | 2.7 | 14018 | 18822 | 4804 | 34.3 | 2.3 |
| India | 1176 | 1391 | 215 | 18.3 | 1.5 | 8947 | 12276 | 3329 | 37.2 | 1.5 |
| China | 941 | 837 | -104 | -11.1 | 0.9 | 7364 | 9449 | 2085 | 28.3 | 1.1 |
| South Afr. | 591 | 779 | 188 | 31.8 | 0.8 | 11544 | 5246 | -6298 | -54.6 | 0.6 |
| Other | 7124 | 7999 | 875 | 12.3 | 8.2 | 58066 | 65344 | 7278 | 12.5 | 8.0 |
| Total | 86819 | 94627 | 7808 | 9.0 | 100.0 | 752128 | 822674 | 70546 | 9.4 | 100.0 |

| | September 2012 Top 30 Nameplates | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | September Month | | | | | September Year To Date | | | | |
| | Year | | Difference | | % | Year | | Difference | | % |
| | 2011 | 2012 | Volume | % | Share | 2011 | 2012 | Volume | % | Share |
| Toyota | 17378 | 17300 | -78 | -0.4 | 18.3 | 131371 | 159111 | 27740 | 21.1 | 19.3 |
| Holden | 11009 | 8955 | -2054 | -18.7 | 9.5 | 95932 | 85345 | -10587 | -11.0 | 10.4 |
| Mazda | 6037 | 10093 | 4056 | 67.2 | 10.7 | 65955 | 77862 | 11907 | 18.1 | 9.5 |
| Hyundai | 7508 | 7815 | 307 | 4.1 | 8.3 | 65129 | 68460 | 3331 | 5.1 | 8.3 |
| Ford | 8161 | 7764 | -397 | -4.9 | 8.2 | 69495 | 65892 | -3603 | -5.2 | 8.0 |
| Nissan | 5892 | 6228 | 336 | 5.7 | 6.6 | 50658 | 58749 | 8091 | 16.0 | 7.1 |
| Mitsubishi | 4798 | 5802 | 1004 | 20.9 | 6.1 | 46107 | 44444 | -1663 | -3.6 | 5.4 |
| Volks. | 4407 | 4949 | 542 | 12.3 | 5.2 | 32153 | 40223 | 8070 | 25.1 | 4.9 |
| Subaru | 2503 | 3211 | 708 | 28.3 | 3.4 | 26874 | 30779 | 3905 | 14.5 | 3.7 |
| Honda | 1845 | 2472 | 627 | 34.0 | 2.6 | 23490 | 25336 | 1846 | 7.9 | 3.1 |
| KIA | 2222 | 2744 | 522 | 23.5 | 2.9 | 19025 | 23456 | 4431 | 23.3 | 2.9 |
| Suzuki | 1725 | 2318 | 593 | 34.4 | 2.4 | 18188 | 18068 | -120 | -0.7 | 2.2 |
| Mercedes | 2004 | 1941 | -63 | -3.1 | 2.1 | 15614 | 16205 | 591 | 3.8 | 2.0 |
| BMW | 1635 | 1630 | -5 | -0.3 | 1.7 | 12809 | 13627 | 818 | 6.4 | 1.7 |
| Jeep | 948 | 1790 | 842 | 88.8 | 1.9 | 5990 | 13003 | 7013 | 117.1 | 1.6 |
| Audi | 1200 | 1333 | 133 | 11.1 | 1.4 | 11304 | 10828 | -476 | -4.2 | 1.3 |
| Great Wall | 778 | 773 | -5 | -0.6 | 0.8 | 6136 | 8480 | 2344 | 38.2 | 1.0 |
| L/Rover | 481 | 670 | 189 | 39.3 | 0.7 | 4403 | 6088 | 1685 | 38.3 | 0.7 |
| Isuzu Ute | 498 | 591 | 93 | 18.7 | 0.6 | 4672 | 5667 | 995 | 21.3 | 0.7 |
| Isuzu | 567 | 611 | 44 | 7.8 | 0.6 | 4835 | 5343 | 508 | 10.5 | 0.6 |
| Lexus | 600 | 492 | -108 | -18.0 | 0.5 | 4498 | 4878 | 380 | 8.4 | 0.6 |
| Volvo Car | 347 | 482 | 135 | 38.9 | 0.5 | 3969 | 4269 | 300 | 7.6 | 0.5 |
| Peugeot | 370 | 436 | 66 | 17.8 | 0.5 | 4052 | 3919 | -133 | -3.3 | 0.5 |
| Renault | 304 | 566 | 262 | 86.2 | 0.6 | 2513 | 3400 | 887 | 35.3 | 0.4 |
| Hino | 279 | 372 | 93 | 33.3 | 0.4 | 2570 | 3089 | 519 | 20.2 | 0.4 |
| Skoda | 421 | 409 | -12 | -2.9 | 0.4 | 1839 | 3045 | 1206 | 65.6 | 0.4 |
| Mits Fuso | 307 | 285 | -22 | -7.2 | 0.3 | 2696 | 2555 | -141 | -5.2 | 0.3 |
| Mini | 214 | 194 | -20 | -9.3 | 0.2 | 1703 | 1771 | 68 | 4.0 | 0.2 |
| Kenworth | 164 | 213 | 49 | 29.9 | 0.2 | 1196 | 1653 | 457 | 38.2 | 0.2 |
| Dodge | 464 | 185 | -279 | -60.1 | 0.2 | 1984 | 1651 | -333 | -16.8 | 0.2 |
| Other | 1753 | 2003 | 250 | 14.3 | 6.0 | 14968 | 15478 | 510 | 3.4 | 5.6 |
| Total | 86819 | 94627 | 7808 | 9.0 | 100.0 | 752128 | 822674 | 70546 | 9.4 | 100.0 |

| September 2012 Top 20 Passenger Nameplates | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | September Month | | | | | September Year To Date | | | | |
| | Year | | Difference | | % | Year | | Difference | | % |
| | 2011 | 2012 | Volume | % | Share | 2011 | 2012 | Volume | % | Share |
| Toyota | 8344 | 8021 | -323 | -3.9 | 16.3 | 59816 | 70369 | 10553 | 17.6 | 16.5 |
| Holden | 7875 | 5406 | -2469 | -31.4 | 11.0 | 68253 | 58087 | -10166 | -14.9 | 13.7 |
| Hyundai | 5484 | 6213 | 729 | 13.3 | 12.6 | 48020 | 51835 | 3815 | 7.9 | 12.2 |
| Mazda | 4315 | 6731 | 2416 | 56.0 | 13.7 | 49203 | 50751 | 1548 | 3.1 | 11.9 |
| Ford | 4363 | 4075 | -288 | -6.6 | 8.3 | 38316 | 35202 | -3114 | -8.1 | 8.3 |
| Volks. | 2721 | 3235 | 514 | 18.9 | 6.6 | 22408 | 25563 | 3155 | 14.1 | 6.0 |
| Honda | 1592 | 2050 | 458 | 28.8 | 4.2 | 19092 | 22668 | 3576 | 18.7 | 5.3 |
| KIA | 1522 | 2106 | 584 | 38.4 | 4.3 | 13955 | 17404 | 3449 | 24.7 | 4.1 |
| Suzuki | 1504 | 1806 | 302 | 20.1 | 3.7 | 15318 | 14538 | -780 | -5.1 | 3.4 |
| Mitsubishi | 1422 | 1322 | -100 | -7.0 | 2.7 | 15108 | 12404 | -2704 | -17.9 | 2.9 |
| Mercedes | 1388 | 1211 | -177 | -12.8 | 2.5 | 10218 | 10593 | 375 | 3.7 | 2.5 |
| Nissan | 1518 | 1369 | -149 | -9.8 | 2.8 | 11523 | 10567 | -956 | -8.3 | 2.5 |
| Subaru | 934 | 1349 | 415 | 44.4 | 2.7 | 12118 | 10264 | -1854 | -15.3 | 2.4 |
| BMW | 890 | 992 | 102 | 11.5 | 2.0 | 7346 | 8224 | 878 | 12.0 | 1.9 |
| Audi | 962 | 686 | -276 | -28.7 | 1.4 | 8107 | 6876 | -1231 | -15.2 | 1.6 |
| Lexus | 439 | 341 | -98 | -22.3 | 0.7 | 3208 | 3306 | 98 | 3.1 | 0.8 |
| Peugeot | 329 | 355 | 26 | 7.9 | 0.7 | 3618 | 3018 | -600 | -16.6 | 0.7 |
| Skoda | 362 | 284 | -78 | -21.5 | 0.6 | 1595 | 1999 | 404 | 25.3 | 0.5 |
| Dodge | 439 | 180 | -259 | -59.0 | 0.4 | 1614 | 1462 | -152 | -9.4 | 0.3 |
| Volvo Car | 187 | 167 | -20 | -10.7 | 0.3 | 1637 | 1321 | -316 | -19.3 | 0.3 |
| Other | 1110 | 1311 | 201 | 18.1 | 2.5 | 8829 | 8843 | 14 | 0.2 | 2.2 |
| Total | 47700 | 49210 | 1510 | 3.2 | 100.0 | 419302 | 425294 | 5992 | 1.4 | 100.0 |

| September 2012 Top 20 SUV Nameplates | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | September Month | | | | | September Year To Date | | | | |
| | Year | | Difference | | % | Year | | Difference | | % |
| | 2011 | 2012 | Volume | % | Share | 2011 | 2012 | Volume | % | Share |
| Toyota | 4094 | 4460 | 366 | 8.9 | 17.8 | 32440 | 44547 | 12107 | 37.3 | 19.5 |
| Nissan | 2377 | 2952 | 575 | 24.2 | 11.8 | 21038 | 28049 | 7011 | 33.3 | 12.3 |
| Subaru | 1569 | 1862 | 293 | 18.7 | 7.4 | 14756 | 20515 | 5759 | 39.0 | 9.0 |
| Mazda | 1047 | 2238 | 1191 | 113.8 | 8.9 | 9363 | 18104 | 8741 | 93.4 | 7.9 |
| Mitsubishi | 1956 | 2106 | 150 | 7.7 | 8.4 | 17090 | 17280 | 190 | 1.1 | 7.6 |
| Holden | 1179 | 1247 | 68 | 5.8 | 5.0 | 10775 | 13445 | 2670 | 24.8 | 5.9 |
| Jeep | 948 | 1790 | 842 | 88.8 | 7.1 | 5990 | 13003 | 7013 | 117.1 | 5.7 |
| Ford | 1512 | 1213 | -299 | -19.8 | 4.8 | 11598 | 12844 | 1246 | 10.7 | 5.6 |
| Hyundai | 1459 | 1310 | -149 | -10.2 | 5.2 | 12011 | 11859 | -152 | -1.3 | 5.2 |
| Volks | 957 | 757 | -200 | -20.9 | 3.0 | 5342 | 6918 | 1576 | 29.5 | 3.0 |
| L/Rover | 471 | 666 | 195 | 41.4 | 2.7 | 4311 | 6012 | 1701 | 39.5 | 2.6 |
| KIA | 654 | 637 | -17 | -2.6 | 2.5 | 4691 | 5913 | 1222 | 26.0 | 2.6 |
| BMW | 745 | 638 | -107 | -14.4 | 2.5 | 5463 | 5403 | -60 | -1.1 | 2.4 |
| Audi | 238 | 647 | 409 | 171.8 | 2.6 | 3197 | 3952 | 755 | 23.6 | 1.7 |
| Suzuki | 202 | 488 | 286 | 141.6 | 1.9 | 2648 | 3164 | 516 | 19.5 | 1.4 |
| Volvo Car | 160 | 315 | 155 | 96.9 | 1.3 | 2332 | 2948 | 616 | 26.4 | 1.3 |
| Honda | 253 | 422 | 169 | 66.8 | 1.7 | 4398 | 2668 | -1730 | -39.3 | 1.2 |
| Great Wall | 242 | 239 | -3 | -1.2 | 1.0 | 2439 | 2560 | 121 | 5.0 | 1.1 |
| Mercedes | 205 | 391 | 186 | 90.7 | 1.6 | 2217 | 2473 | 256 | 11.5 | 1.1 |
| Lexus | 161 | 151 | -10 | -6.2 | 0.6 | 1290 | 1572 | 282 | 21.9 | 0.7 |
| Other | 349 | 550 | 201 | 57.6 | 2.2 | 3798 | 5166 | 1368 | 36.0 | 2.2 |
| Total | 20778 | 25079 | 4301 | 20.7 | 100.0 | 177187 | 228395 | 51208 | 28.9 | 100.0 |

| September 2012 Light Commercial Nameplates | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | September Month | | | | | September Year To Date | | | | |
| | Year | | Difference | | % | Year | | Difference | | % |
| | 2011 | 2012 | Volume | % | Share | 2011 | 2012 | Volume | % | Share |
| Toyota | 4940 | 4819 | -121 | -2.4 | 27.4 | 39115 | 44195 | 5080 | 13.0 | 30.2 |
| Nissan | 1997 | 1907 | -90 | -4.5 | 10.8 | 18098 | 20133 | 2035 | 11.2 | 13.7 |
| Ford | 2190 | 2456 | 266 | 12.1 | 14.0 | 18619 | 17616 | -1003 | -5.4 | 12.0 |
| Mits. Fuso | 1420 | 2374 | 954 | 67.2 | 13.5 | 13909 | 14760 | 851 | 6.1 | 10.1 |
| Holden | 1955 | 2302 | 347 | 17.7 | 13.1 | 16904 | 13813 | -3091 | -18.3 | 9.4 |
| Mazda | 675 | 1124 | 449 | 66.5 | 6.4 | 7389 | 9007 | 1618 | 21.9 | 6.1 |
| Volks. | 706 | 877 | 171 | 24.2 | 5.0 | 4021 | 7205 | 3184 | 79.2 | 4.9 |
| Great Wall | 536 | 534 | -2 | -0.4 | 3.0 | 3697 | 5920 | 2223 | 60.1 | 4.0 |
| Isuzu Ute | 498 | 591 | 93 | 18.7 | 3.4 | 4672 | 5667 | 995 | 21.3 | 3.9 |
| Hyundai | 565 | 292 | -273 | -48.3 | 1.7 | 5098 | 4766 | -332 | -6.5 | 3.3 |
| Mercedes | 123 | 84 | -39 | -31.7 | 0.5 | 825 | 800 | -25 | -3.0 | 0.5 |
| Ssang. | 70 | 41 | -29 | -41.4 | 0.2 | 464 | 537 | 73 | 15.7 | 0.4 |
| Renault | 36 | 71 | 35 | 97.2 | 0.4 | 402 | 528 | 126 | 31.3 | 0.4 |
| Mitsubishi | 48 | 35 | -13 | -27.1 | 0.2 | 319 | 481 | 162 | 50.8 | 0.3 |
| Suzuki | 19 | 24 | 5 | 26.3 | 0.1 | 222 | 366 | 144 | 64.9 | 0.2 |
| Citroen | 12 | 23 | 11 | 91.7 | 0.1 | 149 | 169 | 20 | 13.4 | 0.1 |
| Proton | 32 | 4 | -28 | -87.5 | 0.0 | 313 | 149 | -164 | -52.4 | 0.1 |
| KIA | 46 | 1 | -45 | -97.8 | 0.0 | 379 | 139 | -240 | -63.3 | 0.1 |
| Peugeot | 10 | 14 | 4 | 40.0 | 0.1 | 136 | 116 | -20 | -14.7 | 0.1 |
| Fiat | 8 | 12 | 4 | 50.0 | 0.1 | 87 | 91 | 4 | 4.6 | 0.1 |
| L/Rover | 10 | 4 | -6 | -60.0 | 0.0 | 92 | 76 | -16 | -17.4 | 0.1 |
| Total | 15896 | 17589 | 1693 | 10.7 | 100.0 | 134910 | 146534 | 11624 | 8.6 | 100.0 |

| September 2012 Heavy Truck Nameplates | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | September Month | | | | | September Year To Date | | | | |
| | Year | | Difference | | % | Year | | Difference | | % |
| | 2011 | 2012 | Volume | % | Share | 2011 | 2012 | Volume | % | Share |
| Isuzu | 567 | 611 | 44 | 7.8 | 22.2 | 4835 | 5343 | 508 | 10.5 | 23.8 |
| Hino | 278 | 372 | 94 | 33.8 | 13.5 | 2570 | 3089 | 519 | 20.2 | 13.8 |
| Mercedes | 288 | 255 | -33 | -11.5 | 9.3 | 2354 | 2339 | -15 | -0.6 | 10.4 |
| Mits Fuso | 259 | 250 | -9 | -3.5 | 9.1 | 2377 | 2074 | -303 | -12.7 | 9.2 |
| K'worth | 164 | 213 | 49 | 29.9 | 7.7 | 1196 | 1653 | 457 | 38.2 | 7.4 |
| Iveco | 149 | 184 | 35 | 23.5 | 6.7 | 1227 | 1363 | 136 | 11.1 | 6.1 |
| Volvo | 153 | 123 | -30 | -19.6 | 4.5 | 794 | 1001 | 207 | 26.1 | 4.5 |
| W/Star | 72 | 103 | 31 | 43.1 | 3.7 | 646 | 739 | 93 | 14.4 | 3.3 |
| Mack | 85 | 103 | 18 | 21.2 | 3.7 | 586 | 696 | 110 | 18.8 | 3.1 |
| Fiat | 68 | 116 | 48 | 70.6 | 4.2 | 637 | 556 | -81 | -12.7 | 2.5 |
| Niss UD | 59 | 53 | -6 | -10.2 | 1.9 | 674 | 553 | -121 | -18.0 | 2.5 |
| Volks. | 23 | 80 | 57 | 247.8 | 2.9 | 382 | 537 | 155 | 40.6 | 2.4 |
| Freightl. | 57 | 76 | 19 | 33.3 | 2.8 | 537 | 520 | -17 | -3.2 | 2.3 |
| Scania | 39 | 63 | 24 | 61.5 | 2.3 | 308 | 398 | 90 | 29.2 | 1.8 |
| Man | 23 | 27 | 4 | 17.4 | 1.0 | 207 | 305 | 98 | 47.3 | 1.4 |
| Renault | 1 | 38 | 37 | 3700.0 | 1.4 | 35 | 302 | 267 | 762.9 | 1.3 |
| Caterpillar | 15 | 36 | 21 | 140.0 | 1.3 | 75 | 245 | 170 | 226.7 | 1.1 |
| Ford | 96 | 20 | -76 | -79.2 | 0.7 | 962 | 230 | -732 | -76.1 | 1.0 |
| Daf | 21 | 20 | -1 | -4.8 | 0.7 | 108 | 217 | 109 | 100.9 | 1.0 |
| Hyundai | 10 | 4 | -6 | -60.0 | 0.1 | 94 | 60 | -34 | -36.2 | 0.3 |
| Other | 18 | 2 | -16 | -88.9 | 0.3 | 125 | 231 | 106 | 84.8 | 8.4 |
| Total | 2445 | 2749 | 304 | 12.4 | 100.0 | 20729 | 22451 | 1722 | 8.3 | 100.0 |

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