GREATER DANDENONG
City of Opportunity

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Enquiries: 8571 1576

30 April 2015

Dr Kathleen Dermody
Committee Secretary
Senate Economics Reference Committee
PO Box 6100
Parliament House
Canberra
Australian Capital Territory 2600

Dear Dr Dermody

Re: Submission to Australia's automotive industry inquiry

Enclosed is the City of Greater Dandenong's submission to the Senate Economics Reference Committee Inquiry into the Future of Australia's Automotive Industry.

Yours sincerely

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City of Greater Dandenong

Submission to the Senate Economics References Committee

Inquiry into the future of Australia's automotive industry

30 April 2015

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Senate Economics Reference Committee

City of Greater Dandenong Submission

Inquiry into the future of Australia's automotive industry

About the City of Greater Dandenong

The City of Greater Dandenong (CGD) is a local government area in Victoria, in the south-eastern suburbs of Melbourne. The CGD has an area of just under 130 square kilometres and approximately 146,000 residents in 2014.

CGD's automotive manufacturing and supply chain cluster

The City of Greater Dandenong has for many years been home to a large and vibrant manufacturing industry. Automotive related manufacturing has long been a major contributor to the CGD's industrial base. A recent employment report states that the Motor Vehicle & Parts sector is the second largest manufacturing sector in the CGD employing a reported 3,385 people[1]. The relative scale of this sector highlights its economic importance to the local community and the state with some 21% of Victoria's auto supply chain businesses located in the CGD. The economic value-add of the automotive sector in the CGD is reported at $305 million, the third highest category across manufacturing sectors as of January 2015[2].

The closure of the Ford, Holden, and Toyota manufacturing plants will have a significant impact on the survival of an automotive sector in CGD. A recent survey reported more than 50% the firms in the sector were looking at possible redundancies in the short to medium term.

Information sources supporting the CGD submission

Numerous sources were accessed to provide information for this submission. Recently the Victorian Government Department of Economic Development, Jobs, Transport and Resources surveyed Victorian business operating in the automotive sector. The product of this research is two reports titled Automotive Supply Chain Survey Reports I & II, published in February 2015. These reports compiled responses from face to face interviews conducted with 1st and 2nd tier automotive supply chain firms throughout Victoria as a result of the looming Ford, GMH and Toyota factory closures. These reports will be referred to as the *DEDJTR reports* in this submission document. A Remplan employment report is also referenced.

During 2014 the CGD via the South East Business Network performed a pilot of a road-map exercise to assist manufacturing and engineering businesses impacted by the down-turn in commercial activity preceding the automotive plant closures. This activity has informed the CGD of the issues faced and to be faced by participants in the automotive supply chain.

The South East Business Network (SEBN) and the South East Manufacturing Manager's Alliance (SEMMA) are very active industry bodies with long standing relationships across the CGD's automotive supply chain cluster of more than 500 manufacturing companies across a diverse range of disciplines. Surveying their membership and their continual contact and involvement with local participants in the automotive supply chain has provided the two bodies with an understanding of

the likely magnitude and gravity of the impact the closure of the big three car plants will have on local suppliers, employees and their families.

Addressing the terms of reference

a) Maintaining the capacity for Australia to engage in advanced manufacturing, by ensuring skills and industrial capabilities that have been sustained by the automotive industry are not lost.

i. Capability and capacity are two critical elements necessary for the growth and development of a thriving manufacturing sector. Together the engineering and trades people who possess necessary capabilities comprise over one-third of the people employed in the automotive sector in the CGD, as detailed in the *DEDJTR* report - "Despite perception of the auto supply chain being the domain of the semi-skilled employee, engineering and trades people together add up to more than process or semi-skilled employees[2]."

ii. A release of many skilled manufacturing workers may prove beneficial to non-automotive manufacturing organisations seeking to expand their skill base in the short-term. In the past skills have flowed from the automotive sector to other manufacturing industries in Victoria. This trend may continue as a result of a large number of skilled workers released on to the job market. However ending the trickle down of skills and capabilities from the automotive sector may constrain advanced manufacturing in other sectors in the longer term.

iii. The trickle-down to other industries from the Tier 1 automotive manufacturers is not limited to employee skills and capabilities. The major manufacturers have set standards to develop and enhance accepted practices in areas such as workplace safety, quality, and continuous improvement. The larger manufacturers have set the benchmark for local companies to improve the way they managed their manufacturing businesses.

iv. Anecdotal reports indicate that skilled people are already leaving Victoria automotive manufacturing to secure roles in foreign automotive plants. An automotive brain-drain may contribute to a loss of skill across the manufacturing sector as a whole.

v. Current relatively high levels of unemployment across Australia and a struggling manufacturing sector, may mean that a sizable portion of the skilled workers entering the job market will be unable to secure new roles locally in the short-term.

vi. The automotive sector has for many years provided an attractive source of employment for people prepared to train to acquire desired trade or engineering skills. The loss of a substantial portion of the automotive sector will likely reduce the attractiveness of trade or engineering training unless an increase in demand from alternative sector(s) replaces the lost automotive roles.

vii. A loss of some fundamental manufacturing trade and engineering capabilities or capacity may occur in the medium-term as skilled people turn to other sources of employment and training levels decrease due to a lack of job availability.

viii. The average age of skilled employees is for some engineering trades, much older than the average general employed population. Skills such as tool and die making and other precision machining skills appear often to sit with employees who are in the fifty plus age category.

ix. As a consequence of the factors outlined above, it seems that in the medium term Australia's capacity to engage in advanced manufacturing will benefit from availability of capable skilled workers released from the automotive manufacturers. Limited long-term

employment opportunities may reduce the pool of skilled resources as older workers retire or leave the manufacturing industry and new trainees are not attracted to the industry. A reduced pool of skilled people has the potential to constrain growth across advanced manufacturing in Australia in the long term. Some sub-sectors such as the foundry industry have already experienced skill-loss. Precision machining is a skill category that may suffer a similar fate.

x. Ultimately a growth in the number and scale of sustainable advanced-manufacturing businesses is essential to provide employment for skilled workers and to attract trainees. Viable and sustainable businesses need to make and market competitive products that have international demand. Market competitiveness in its various guises is essential to create employment opportunities for skilled workers.

Possible areas of government support:

xi. Perform a skills and capability audit across regions impacted by car-plant closures to understand the skills demographic.

xii. Introduce a proactive retraining program based upon an understanding of the skill demands outside the automotive sector.

xiii. Fund and coordinate an advanced manufacturing development program.

b) Reducing Australia's dependency on commodity exports by diversifying the country's economic base, noting the importance of advanced manufacturing, including the automotive industry, in this diversification.

i. The CGD has long been home to a diverse ethnic community with a large immigrant population. Immigrants have historically been attracted to the Dandenong region because of employment opportunities created by the CGDs large industrial base. Manufacturing, including the automotive sector, has for many decades provided much of Dandenong's industrial employment base. The closure of large-scale automotive production in the region, on top of a post-GFC soft manufacturing environment, will further reduce employment opportunities.

ii. Australia, more than many other developed economies, has a large portion of its GDP tied to commodity exports. Advanced manufacturing by its very nature adds-value to raw materials, helping insulate the greater economy from fluctuations in commodity prices and demand. Local economic activity arising from the broader (agricultural rather than resources) commodity sector has significantly reduced over the past two decades due to the closure of large canning and packaging plants in Dandenong. Reduced income across the community from the broader commodity sector places a greater reliance for income on manufacturing and other industrial activity.

iii. Advanced manufacturing relies on skill, knowledge, technology and innovation to create products saleable in local and international markets. Unless the skill-base that exists in this region can be redeployed outside the automotive sector to other value-adding industries locally, a significant portion of the $300m income earned by that sector will be lost from the local economy. It is unlikely that a substantial portion of the lost economic value of the automotive manufacturers can be replaced in the short to medium-term by growth in other advanced manufacturing sectors.

iv. At a community level the reduction or loss of income from advanced manufacturing will materially impact income levels across the local community, particularly a community such as Dandenong which has traditionally been reliant on manufacturing as a source of employment. The social costs of loss of employment and limited potential for re-employment are well documented yet difficult to quantify. The economic attractiveness of the region may degrade as employment opportunities reduce, with subsequent undesirable economic impacts.

Possible areas of government support:

v. Recognise that government has a role to play in helping local communities respond and recover from the 'death' of an industry sector as is being experienced in the CGD and surrounding districts.

vi. Recognise that individual businesses lack the collective cohesion to self-organise to secure new market opportunities and diversification. Programs that support collaboration, new product development, and international market access will be beneficial in supporting advanced manufacturing in this region.

vii. The Victorian state government has recognised Dandenong as a major business activity centre, ongoing investment in the region to increase and diversify employment opportunity

is crucial to the future success of this major Business Activity Centre. Federal government support for further initiatives would support diversification efforts.

c) The role of all sectors of the automotive industry, including, but not limited to, motor vehicle production, component making, after-market manufacturing, engineering, servicing, retail motor trades, other forms of sales support, and the training of apprentices, in supporting an advanced broad-based economy.

i. The City of Greater Dandenong is home to a range of retail motor trades, servicing, and ancillary automotive functions. The majority of those functions exist post-manufacture so will likely continue business with minimal impact from the change of manufacture location from local to international.
ii. Longer parts supply chains may necessitate holding of larger parts inventories locally-within Australia-to meet local demand.
iii. As well as major automotive plants and their supply chain, the CGD is also home to a range of after-market product manufacturing and component making. After-market and accessory manufacturing locally by innovative businesses may prove to be the future of automotive manufacturing in this region. Some local after-market manufacturers earn a sizable portion of their revenue from international markets. Those companies who have experienced international success in-part owe that success to investment in a greater sales and marketing strength, as well as new product development.
iv. Many smaller automotive component manufacturers do not possess the resources or capabilities to develop foot-holds in international markets. In many cases those component makers are selling their services to other manufacturers and do not sell a retail oriented product which can be sold through a retail network.
v. Businesses selling a service such as machining or moulding components face stiffer competition from other component manufacturers as they sell into a narrower market than those who make products for retail sale. The development of a broader after-market or accessory product-set has the potential to be a source of lost revenue for local component makers.

Possible areas of government support:

vi. Fund or develop a program that assists component manufacturers transition to the automotive after-market accessory market.

d) The special difficulties faced by component makers in the transition to global supply chains to other forms of manufacturing, especially as a result of the closure announcements make by the motor vehicle producers.

i. Diversification to global supply chains or to other forms of manufacturing is an obvious strategy adopted by many businesses seeking to replace lost revenue. Although an obvious strategy, diversification is seen by many business managers as a very challenging strategy to implement. The magnitude of this challenge may explain the *DEDJTR* finding that "Almost 50% of the firms had not considered looking at global supply chain opportunities or collaborating or clustering with similar organisations around global project opportunities (internationally or locally)"[2].

ii. Transition to global supply chains and/or to other forms of manufacturing requires considerable knowledge, effort, innovation and investment. Once again the *DEDJTR* found that 50% of the (affected) companies do not currently work with external agencies in areas of R&D, innovation, product development or commercialisation[2]. Such isolation from sources of knowledge and innovation may explain why diversification is seen as such a challenge. Predominately smaller organisations occupy much of the automotive supply chain locally. Many of those smaller organisations will have limited internal capability to provide the knowledge and innovation and/or the capacity to provide the effort and investment that is essential to successfully diversify.

iii. Locally, diversification into alternative industries requires developing new products and services that are not currently being provided locally. Some current automotive industry suppliers are seeking contracts for supply of products and services that are already provided locally. Such a situation is merely cannibalisation of existing markets at the expense of other local suppliers, does not improve the local economy, merely reassigning revenue between local businesses. A surplus of businesses competing for decreasing volumes of work will likely decrease margins with a resulting impact on degrading the profitability of the businesses involved.

iv. Many companies see the value of diversifying but do not know how or where to start; 25%[2] of firms surveyed by the *DEDJTR* have not yet identified a diversification opportunity, either in Australia or off-shore; Only 17%[2] of companies that are diversifying are doing or will do so in Australia.

v. Identifying viable diversification opportunities is challenging for smaller businesses where the majority of management time, energy, investment and skill must be focussed on operational execution. Smaller businesses in particular often have limited sales and marketing capability and capacity necessary to identify opportunities, build relationships the lead to securing contracts to supply.

vi. New product or service development takes time and investment. Product or service development without viable confirmed new market opportunities requires speculative investment. Business owners and shareholders may be reluctant to invest further in a business without greater certainty of return. Businesses need sufficient capital to enact a diversification strategy, limited access to further shareholder investment or financed capital will constrain diversification efforts.

vii. In the City of Greater Dandenong local manufacturers are strongly supported by active industry groups. Despite this support there is limited collaboration among local

manufacturers, collaboration that is needed to develop a cluster of capabilities necessary to develop international market opportunities.

Possible areas of government support:

viii. A program to identify and assist access to international market opportunities within and outside the automotive supply-chain.

ix. A program to identify complementary capabilities across a range of companies which can comprise a competitive cluster that can be marketed collaboratively.

e) New technologies influencing the automotive industry, both in Australia and internationally, especially new and developing forms of propulsion, such as hydrogen, electric engines (motors), and hybrid engines.

i. Since the start of this millennium a wide range of advanced power-train cars and light commercial vehicles have come to market, globally. Many of the major car manufacturers now produce hybrid, plug-in hybrid, plug-in battery electric, and hydrogen fuel-cell vehicles.

ii. Internationally the rate of uptake of hybrid vehicles has significantly exceeded the growth in popularity of these vehicles in Australia. Over 9 million hybrid-electric vehicles have been sold worldwide since their inception in 1997. In Japan hybrid sales have exceeded 30% of all passenger vehicle sales and plug-in electric vehicles have topped sales charts in some Scandinavian countries, showing the benefit of government incentives to promote the uptake of new technologies[3,5]. Advanced power-train vehicles account for 3% of all vehicle sales in the California[4] whereas sales of hybrid vehicles represents closer to 1% of passenger vehicle sales in Australia.

iii. Hybrid vehicles represent the first phase in the development of advanced power-train passenger vehicles. Plug-in electric and fuel-cell vehicles are likely to represent a further evolution of the motor car. As of September 2014, more than 600,000 highway-capable plug-in electric passenger cars and light utility vehicles have been sold in the major global markets[6]. Industry forecasts predict sales of 500,000 electric cars in 2015 alone, showing growing demand for the technology as battery range barriers are overcome.

iv. A Rudd-government initiative saw the large-scale production of one model of hybrid vehicle in Australia – based upon an existing Toyota Camry model. This is the only advanced power-train vehicle to be manufactured in Australia in large numbers.

v. As a consequence of a relative lagging uptake of advanced power-train vehicles and limited local research and development or production of such vehicles in Australia, local manufacturers have minimal experience in producing the required specialist componentry or systems. This relative inexperience and resulting limited technical knowledge represents a challenge for local component and system manufacturers seeking to supply international car plants.

vi. Existing foreign car plants that produce advanced power-train vehicles will have established supplier relationships and contracts in place, creating a barrier to entry for local component manufacturers seeking access to international supply chains.

vii. Additionally, many of the advanced power-train vehicles require far fewer components than exist within the traditional automotive architecture; for instance pure electric vehicles do not have fuel systems, exhaust systems, some do not have cooling systems, nor traditional transmissions, nor various forms of fluid pumps, drive belts etc. This new simplified automotive architecture will reduce global demand for components and systems, increasing competition among component suppliers.

viii. Many industry commentators see the current phase of advanced-power-train development as an intermediate phase, with the ultimate phase being the predominate electrification of the global vehicle fleet over coming decades. Should local manufacturers not secure a foothold in this developing market there is a danger that those manufacturers will be shut-out of the sector if the new automotive architecture proliferates over the coming decade(s).

ix. The loss of local vehicle production means manufacturers previously supplying the car plants must now carve a niche in alternative markets. The global advanced power-train sector is one possible alternative as crossing industries outside the automotive sector will present

more difficult challenges. Carving such a niche in the international automotive sector will require local manufacturers to develop sustainable competitive advantages. Exploiting a competitive advantage is an essential mechanism for market access - as evidenced by the recent supply contract secured by a local manufacturer to produce steering components for a Nissan electric vehicle sold globally. Although rapidly maturing, the global advanced power-train vehicle market is certainly not yet mature. Consequently, niche opportunities will exist.

x. Highly specialised research and development into new battery technologies, hydrogen fuel-cell technologies, more efficient traction motors, and use of composite materials is all well advanced internationally. Many such programs have been in place for years or decades. Commencing R&D in those areas in Australia may be a questionable investment given that such technologies have already been commercialised internationally by major manufacturers. Patent expiration timeframes are likely to be shorter than R&D-to-commercialisation time-frames.

xi. The lack of specialist technical skills in advanced power-trains suggests local component makers should focus on components which are common between traditional and modern automotive architectures – steering, suspension, braking components.

Possible areas of government support:

xii. Federal government support to develop a program to assist local manufacturers in securing contracts into the global supply chain for advanced power-train vehicles would likely increase the success of diversification efforts.

xiii. Elements of such a program could include initiatives that strengthen sales and marketing capability and capacity, identify technical capabilities and sources of competitive advantage, and encourages heightened collaboration.

xiv. Coordination is needed to combine the strengths of local manufacturers to gain access to advanced power-train manufacturing.

f) New business models for the industry, including employee share models and attracting international venture capital and private investment.

i. The average size of many businesses in the automotive supply chain is relatively small. Those smaller business will often lack the breadth of management or supporting capability such as sales and marketing.

ii. International venture capital and private investment are potential sources of capital for business development. However the providers of capital will want to see tangible evidence of market competitiveness through quality, precision, capability/innovation and/or price. Local suppliers must evidence their competitive advantage and translate that advantage into international demand before venture capitalists and private investors are likely to be willing to risk their investment. It is unlikely such investors will be willing to fund speculative business development activity without clear market competitiveness. Similarly traditional sources of financed capital will be reluctant to lend on speculative investment or retooling unless a viable supporting revenue streams can be identified.

iii. The relative small scale of many component manufacturing businesses creates some potential for consolidation across the industry. Barriers to consolidation include cultural factors – most component suppliers are not familiar with collaborating. Many business owners will be very tentative in considering consolidation opportunities.

iv. Often businesses own their premises. Consolidation in some instances will require relocation and vacating current premises. There is a surplus of vacant industrial real-estate available in business parks and industrial areas of Melbourne including the CGD. An inability to sell or lease owned premises is a barrier to consolidation activity across the automotive supply chain.

v. The sales and marketing function is one common weakness shared by smaller component manufacturers. The potential for outsourced local and international sales and marketing functions that serves multiple complementary component manufacturers is an alternate business model that may be applicable to the sector.

vi. Employee share models that involve employees investing in the business to improve the capital base may be one means of improving the financial structure of the business.

vii. Businesses considering consolidation, outsourced sales and marketing functions, or employee share schemes will likely require professional support and guidance.

Possible areas of government support:

viii. Develop a program to actively support consolidation of smaller complementary businesses into a larger businesses of viable scale that can provide an integrated service offering and sustain a sales and marketing capability. Such a program may be government funded but delivered through existing industry groups.

ix. Develop a program to actively coordinate collaboration for business development across multiple businesses that individually don't have the scale or resources to market their products and services internationally. Such a program could emphasise the complementary capabilities from within clusters of suppliers.

x. Fund, partially fund, and coordinate provision of professional services to affected component manufacturers considering alternative business models.

g) The possible effect of early closure of the motor vehicle producers, including risks and consequences for the industry, skills, capabilities, and the broader economy, including social consequences, and what policy actions could mitigate or exacerbate these risks and consequences.

i. Some local component manufacturers reported a steady reduction in orders for components and systems required for the introduction of new vehicle models as early as the start of 2014. Those component manufacturers believed that the big three motor vehicle producers began preparing for the closure of their plants prior to the official announcements of the planned closures.

ii. Consequently some local suppliers have struggled with a steady reduction in revenues over the past year to eighteen months. Revenue reductions have impacted suppliers such as tool and die makers, and injection moulded plastic component manufacturers – lead phases in the development of new models. Other suppliers will see a more gradual revenue impact as current car models are phased out of local production.

iii. Revenue reductions have led to the need for cost reduction, often in the form of staff lay-offs. A depressed local manufacturing sector reduces the likelihood of re-employment with the consequential impact on families and society in general.

iv. Business closures have already occurred, as in one case where a business experienced a significant down-turn in orders for injection-moulded plastic components from the automotive sector.

v. Several Tier 2 and 3 suppliers have reported that the major automotive producers now require them to hold higher component inventories on an unofficial or informal basis. This common tactic is often seen in industries when buyer power exists. Larger businesses adopt this tactic to *push inventory holdings back up the supply chain* as a means of reducing their own requirement for investment in inventory to free-up cash.

vi. Several of the component manufacturers have tried unsuccessfully to address this issue with the automotive companies. The scale of the required inventory holding can be significant for SME component manufacturers – generally a six-figure sum. Holding such large inventories has a negative impact on the working capital position of the component manufacturers.

vii. Additionally, there is a likelihood that a portion of that inventory holding will become obsolete as current models are phased out and manufacture is transitioned overseas. Communication from the local automotive manufacturers regarding their specific future component requirements is essential to allow the local suppliers to manage-down component inventories.

Possible areas of government support:

viii. Lead the negotiation with the automotive manufacturers to agree confirmed dates for the wind-down of local production.

ix. Encourage the car plants to provide suppliers with a forecast demand profile through to wind-down of local production. This information will aid local business in forecasting their own cash-flow, the timing of their own down-sizing, and support restructuring management.

x. A government scheme to partially reimburse component suppliers for obsolete inventories may support the future viability of those businesses.

h) The need to synthesise and consolidate the findings, recommendations and knowledge of other reviews and inquiries pertinent to the automotive industry, in order to identify key policy inconsistencies, regulatory burdens and factors for growth and investment.

i. CGD agrees with the need to consolidate and analyse findings from multiple research and information sources.

ii. The development and implementation of an effective program of activity is essential to provide assistance to impacted businesses, their employees and families in a timely manner.

iii. The fundamental issues arising from the closure of the car plants are a repeat of the issues and dynamics seen in many regions at different times when major industries vacate. These issues are easily understood, well documented and don't require excessive analysis. Government led activity to address issues raised in this submission should not be delayed.

i) The importance of long-term, stable employment for workers in the automotive industry, and the need for greater access to transitional training and career opportunities.

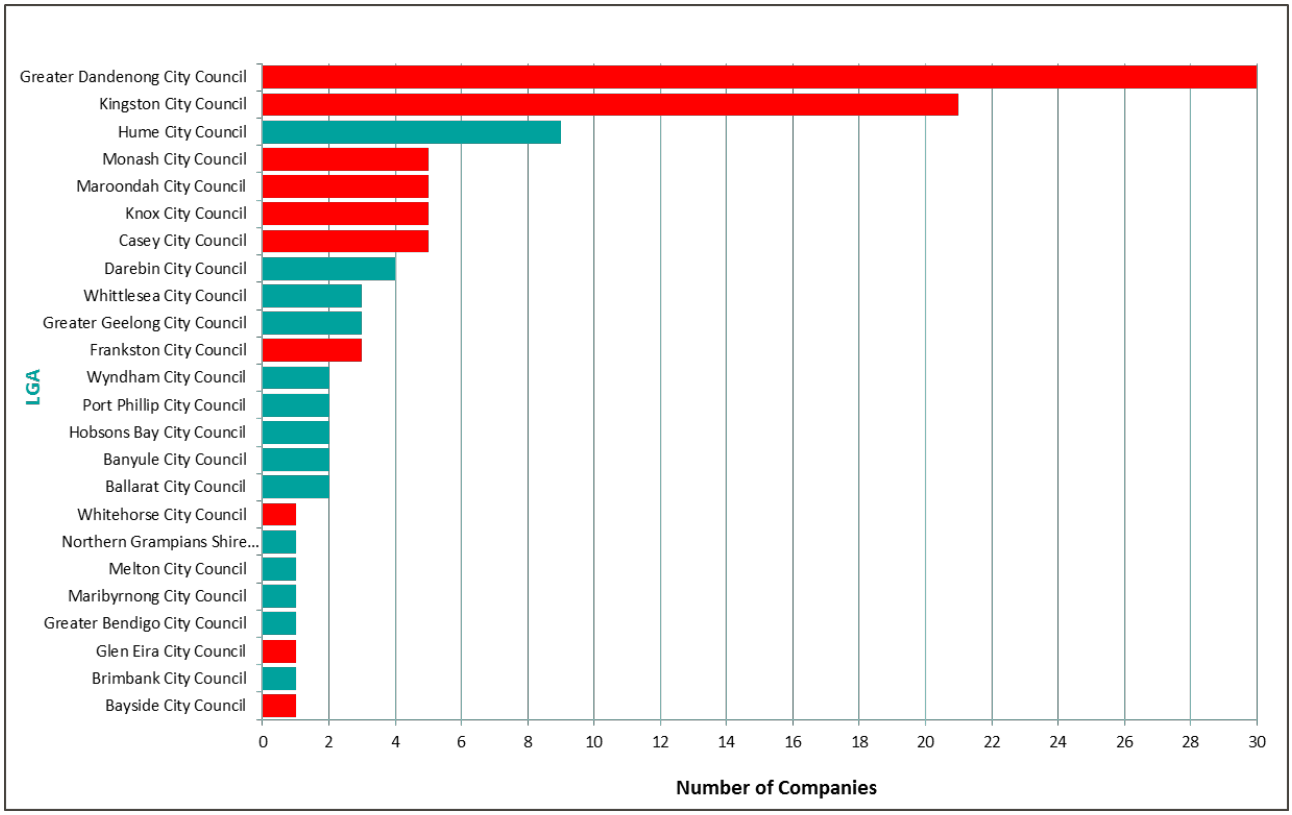
i. Large-volume production of passenger vehicles will cease in Australia in the near future. With the exception of limited componentry and system production, and manufacture of after-market accessories, the automotive industry in Australia will largely transform into a retail sales and servicing industry.
ii. Many local component supplier businesses will struggle to successfully diversify and compete in global markets. Consequently business closures and layoffs will occur within the automotive supply chain.
iii. Several thousand people will enter the Australian job market as a result of the closure of the large car plants. Many of those people will likely struggle to find equivalent work locally as a result of relatively high unemployment levels and a soft manufacturing sector.
iv. Many of the families of the affected workers will experience a proportionally large loss of income, as the workers affected will often be the main or one of the main bread-winners for the family.
v. Financial and social impacts of redundancy are well documented. Additional sources of support to families and affected workers is necessary as it is unlikely that existing social services organisations will have the capacity to cope with a large number of new clients in a short time-frame.
vi. Transitional training programs will be more effective if they are developed and offered as an automotive-industry focussed programs.
vii. Transitional training programs should focus on transitioning affected workers to job-markets in industry sectors that have growth and job opportunities.
viii. A large number of managerial, administrative, and support staff will be impacted by the closure of the car plants. Those non-technical workers may have greater employment industry diversity than trades people and engineers. However the non-technical workers face a similar soft job-market and challenging environment.

Possible areas of government support:

ix. Request that the departing automotive manufacturers provide career transitioning services for redundant staff.
x. Fund or coordinate a transitional training program for the automotive sector, including the supply chain.
xi. Increase funding to social support services to ensure that those organisations have sufficient capacity and capability to assist former automotive workers and their families.

Appendix

Local government areas impacted – by number of companies; highlights the significance of the car plant closures on businesses in the City of Greater Dandenong.



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