



# State of the Industry - Automotive Manufacturing

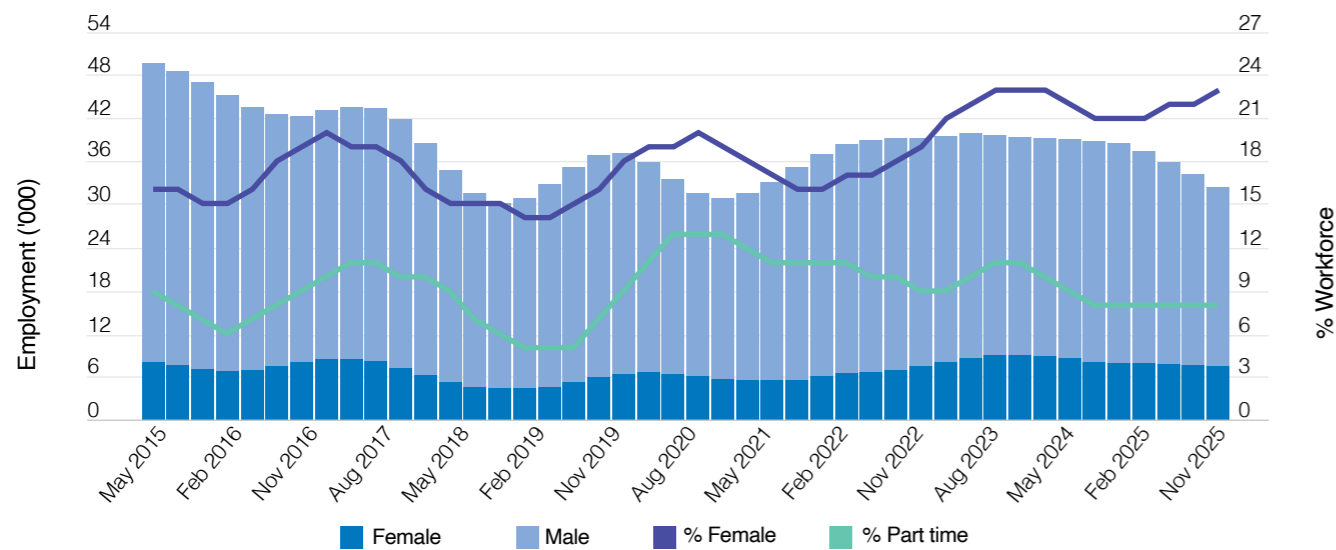
Automotive Manufacturing has shown improvement in female participation since 2022.

Female participation reached its highest level of 23.3% in November 2025. Part-time employment remained stable at 8.0% since 2024 after a decline to 4.8% at the end of 2018 (Figure A7).

Victoria has long been the centre of Australia's Automotive Manufacturing industry, supported by a highly skilled and experienced workforce<sup>1</sup>

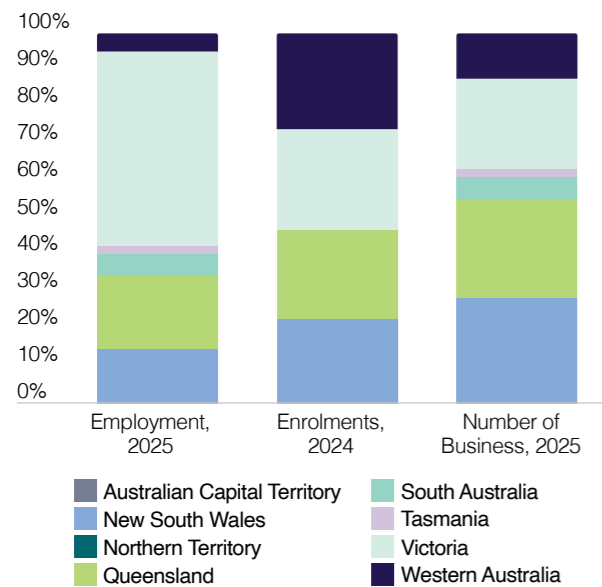
VIC accounts for the largest AUM package provider (27.4%) and 53.8% of employment in the Automotive Manufacturing industry. Meanwhile, New South Wales has the highest concentration of businesses, representing 28% of the total (Figure A8).

Figure A7: Automotive manufacturing employment, 2015–2025



Source: ABS, Labour Force, Australia, Detailed, November 2025; Trended by AUSMASA.

Figure A8: Number of employments, delivery providers and businesses by state, 2024–2025



Source: ABS, Labour Force, Australia, Detailed, November 2025; Trended by AUSMASA; ABS, "Counts of Australian Businesses, including Entries and Exits, June 2021 to June 2025", December 2025; VOCSTATS, "Total VET students and courses 2015-2024", 2024.



<sup>1</sup> IBISWorld, "Motor Vehicle Manufacturing in Australia", 2025.

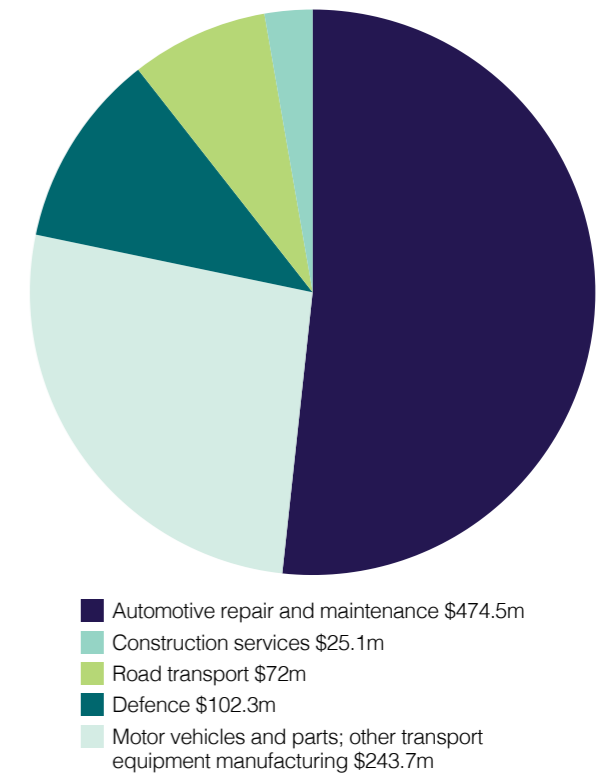
The industry is a key enabler of automotive repair and maintenance.

Automotive Manufacturing contributes \$474.5m to the Automotive repair and maintenance, followed by motor vehicles and parts and other transport equipment manufacturing itself (\$243.7m) (Figure A9). The industry is an integral part of the collision repair ecosystem in enabling domestic supply chains, particularly important as an input to the Mining and Construction industries.

3 out of 11 key occupations in the Automotive Manufacturing industry are experiencing shortages in 2025.

Employment in Motor Vehicle and Motor Vehicle Parts Manufacturing is largely focused on hands-on production roles, with Structural Steel and Welding Trades Workers (4,500) being the most common occupation, followed by Product Assemblers (2,800) and Production Managers (2,600) (Table A4). Given projected demand in EV adoption, there is also a growing need for end-of-life processes, particularly around lithium-ion batteries, to enable repurposing, with demand in the battery space projected to grow from 19,450 to 34,650 in 2050.<sup>2</sup> However, no formal pathways exist in the automotive manufacturing space for these functions. There is also the need to review the AUM training package given recent industry shifts towards EV assembly and drivetrain manufacturing, high-voltage systems, battery end-of-life management, and battery repurposing.

Figure A9: What does the sector support in 2023?



Source: ABS, "Australian National Accounts: Input-Output Tables, 2022-23", March 2025.

Table A4: Key occupations, 2025

| Occupations                                      | Employed | 10-Yr Vacancies change | Included in CSOL? | Shortage |
|--|----------|------------------------|-------------------|----------|
| Structural Steel and Welding Trades Workers      | 4,500    | 72%                    | Yes               | S        |
| Product Assemblers                               | 2,800    | 8%                     | No                | No data  |
| Production Managers                              | 2,600    | 59%                    | Yes               | NS       |
| Industrial, Mechanical and Production Engineers  | 2,200    | 69%                    | Yes               | NS       |
| Vehicle Body Builders and Trimmers               | 1,400    | 28%                    | Yes               | S        |
| Motor Vehicle Parts and Accessories Fitters      | 1,200    | 11%                    | No                | NS       |
| Manufacturers                                    | 1,100    | 56%                    | No                | NS       |
| Engineering Managers                             | 900      | 161%                   | Yes               | NS       |
| Advertising and Marketing Professionals          | 900      | -14%                   | Yes               | NS       |
| Advertising, Public Relations and Sales Managers | 800      | -32%                   | Yes               | NS       |
| Diesel Motor Mechanic                            | 102      | No data                | Yes               | S        |

Source: ABS, Labour Force Estimate: Customised Report, 2026; JSA, "Occupation Shortage List", 2025; JSA, "Internet Vacancy Index (IVI)", February 2026; Department of Home Affairs, "The Core Skills Occupation List", 2024; Note: 1. RS: Regional Shortage; S: Shortage; NS: Not in Shortage 2. Employment is calculated as the four-quarter average for 2025 across occupation unit groups within each sub-industry, rounded to the nearest 100. For Diesel Motor Mechanics, the 2021 census employment figure is used instead.

<sup>2</sup> Battery Stewardship Council, "\$2.1b battery recycling sector critical to Australia's sovereign capability", 13 March 2025.