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AUSTRALIA'S NEW VEHICLE BRAND DENSITY

An indicative comparison with advanced automotive markets

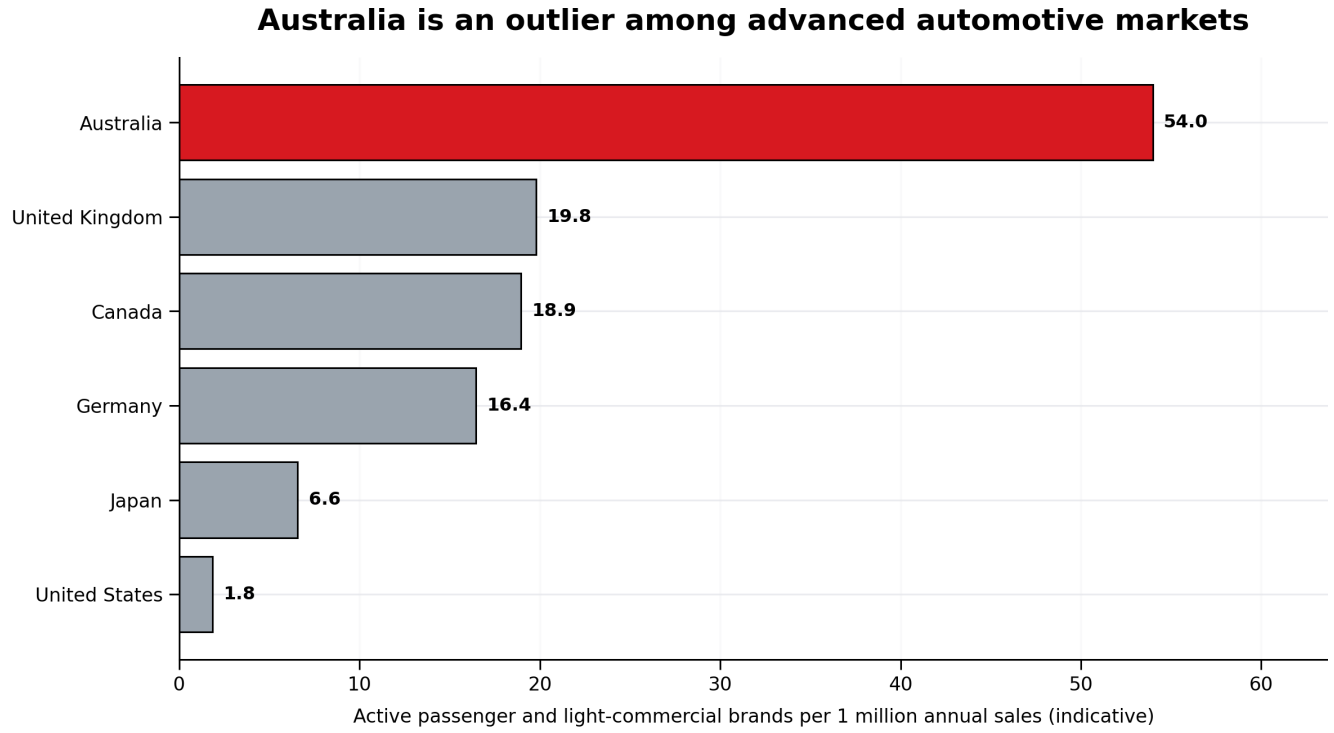
Updated November 2026

Executive Summary

Australia is an outlier among comparable advanced automotive markets. AADA-commissioned analysis by Blue Flag identifies 67 vehicle brands operating in Australia in 2026. Against approximately 1.24 million annual sales, this is equivalent to around 54 brands for every one million vehicles sold.

The comparison is strongest when focused on advanced economies with mature, franchised dealer markets.

Chart 1: Brands Per Million New-Vehicle Sales



Reference period: 2025 sales; Australian brand count: AADA/Blue Flag 2026 analysis. Brand definitions vary by market.

Figure 1. Indicative active passenger and light-commercial vehicle brands per one million annual sales.

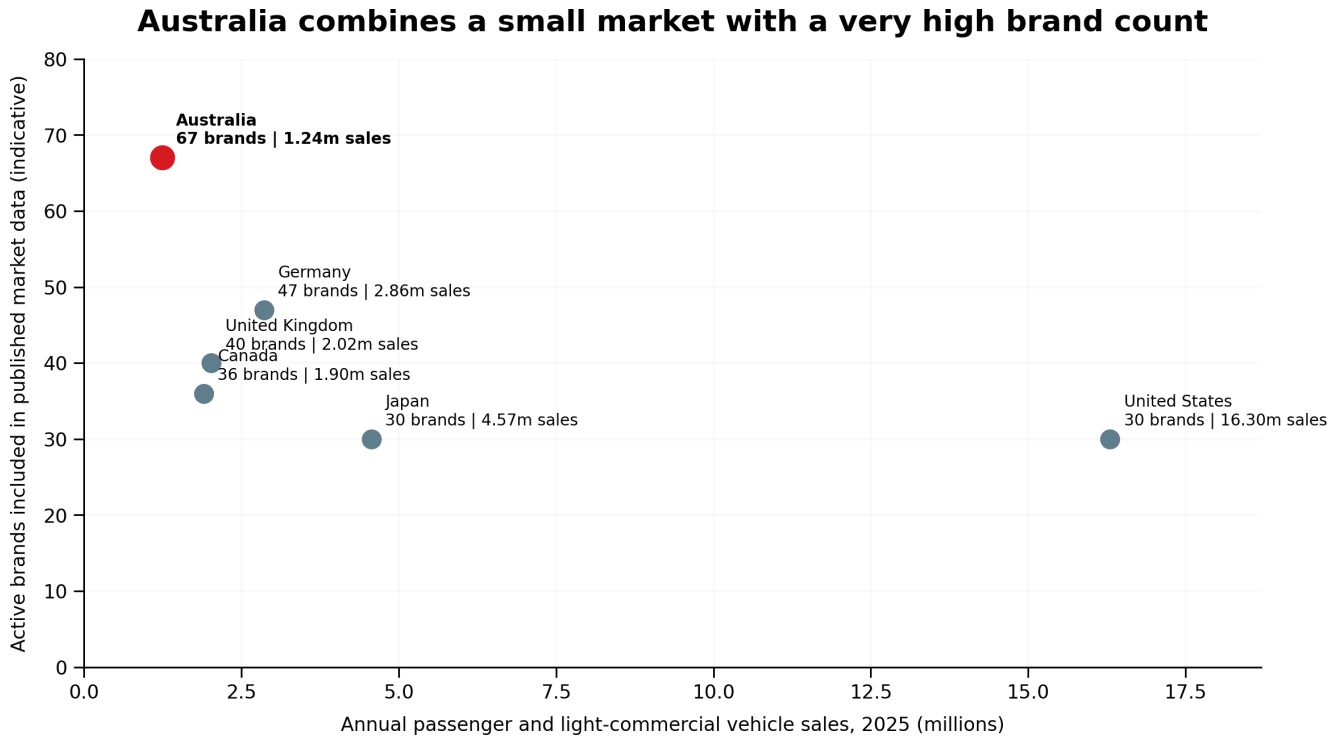
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International Comparison

Market	Brands counted	2025 sales	Brands per million
Australia	67	1.24m	54.0
United Kingdom	40	2.02m	19.8
Canada	36	1.90m	18.9
Germany	47	2.86m	16.4
Japan	30	4.57m	6.6
United States	30	16.30m	1.8

Chart 2: Market Size Compared with Brand Count



Indicative comparison only. Vehicle scope and treatment of low-volume brands differ across national datasets.

Figure 2. Australia occupies the unusual top-left position: a relatively small advanced market with a very high number of competing brands.

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Methodology and Qualification

The preferred metric is; active passenger and light-commercial vehicle brands per one million annual passenger and light-commercial vehicle sales. The series is indicative rather than fully harmonised.

- National sources do not apply perfectly identical definitions.
- Some datasets include very low-volume marques while others publish a narrower brand table.
- The Australian brand count is the AADA-commissioned Blue Flag estimate of 67 brands operating in 2026, matched against full-year 2025 sales.
- Brand counts are indicative counts of active makes drawn from published national market reporting.
- These qualifications should accompany public use of the charts.

Reference Points

- **Australia:** 1,241,037 new vehicles sold in 2025; AADA-commissioned Blue Flag analysis identifies 67 brands operating in 2026 and 75 by 2031. AADA/Blue Flag 2026 brand analysis
- **United Kingdom:** 2,020,520 new passenger-vehicle registrations in 2025; approximately 40 marques in the published market table. SMMT 2025 registration data
- **Canada:** approximately 1.90 million new light vehicles sold in 2025; indicative count of 36 active brands based on published sales-by-make reporting. Canada light-vehicle sales by make
- **Germany:** 2,857,591 passenger-car registrations in 2025; approximately 47 brands in the published brand data. KBA vehicle registration statistics
- **Japan:** 4,565,777 new vehicles in 2025; approximately 30 brands in the published market table. JADA-based 2025 new-car sales data
- **United States:** approximately 16.2 million light-vehicle sales in 2025; approximately 30 active brands used for this comparison. NADA 2025 light-vehicle sales data

Brand counts are indicative and were derived from the makes or marques appearing in the linked national market tables. National definitions and treatment of very low-volume brands are not fully harmonised.