

Foundation
Partner



Global Heavy Vehicle

LEADERS SUMMIT



Hosted by **ARTSA**

GAME CHANGERS

3-4 MAY 2016

Mapping the Market

Dr Peter Hart
Chairman, ARTSA





ARTSA's NEVDIS PROJECT





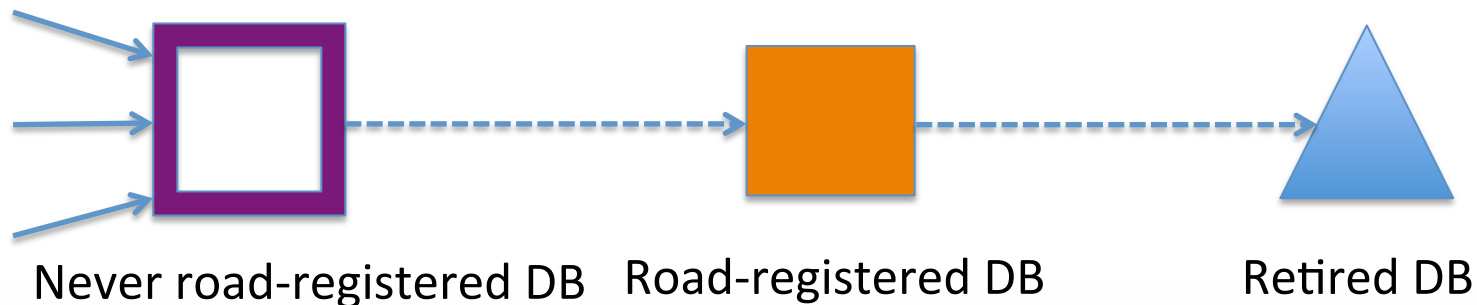
ARTSA's NEVDIS PROJECT

NEVDIS is the National Exchange of Vehicle and Driver Information System

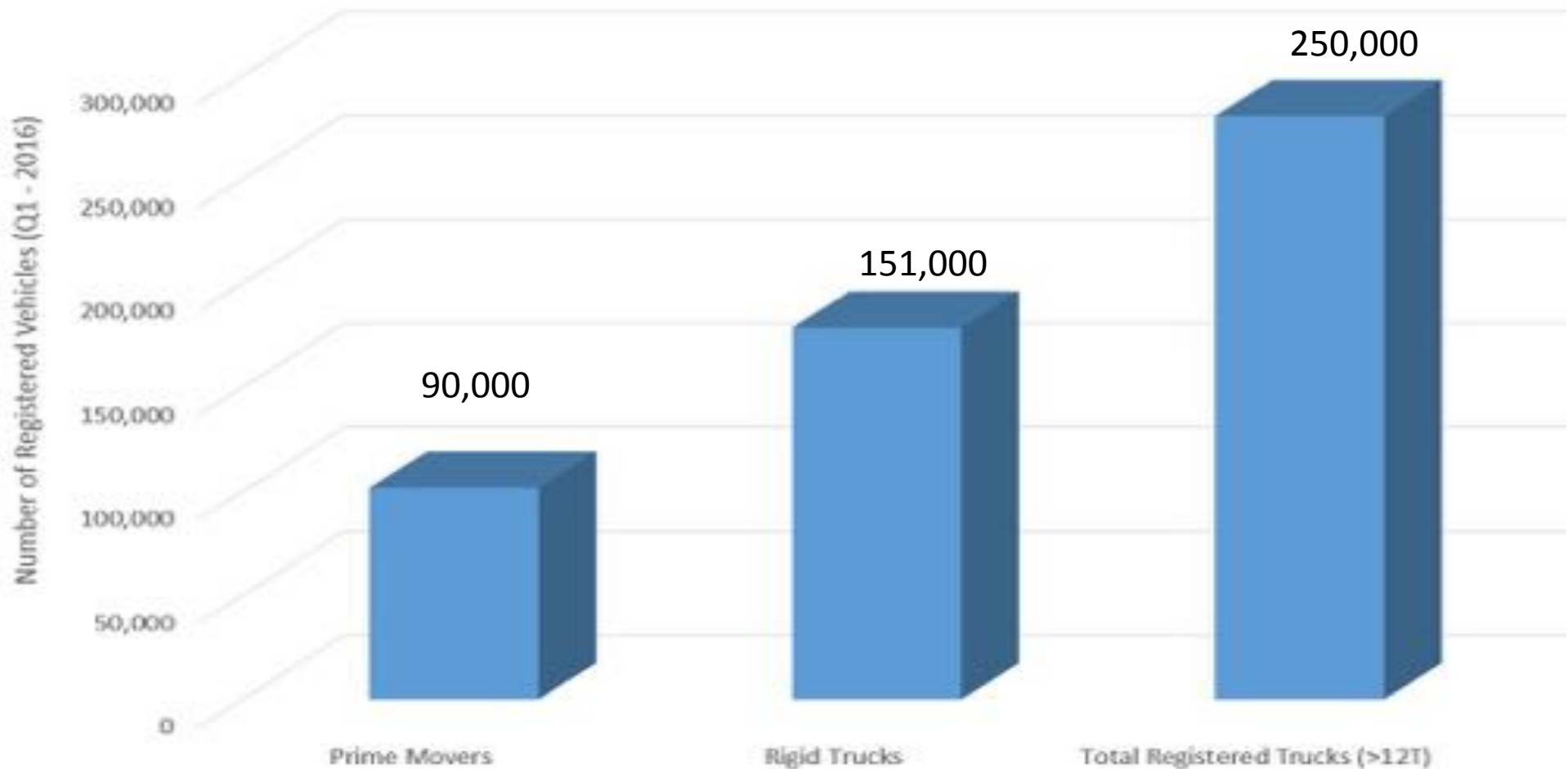


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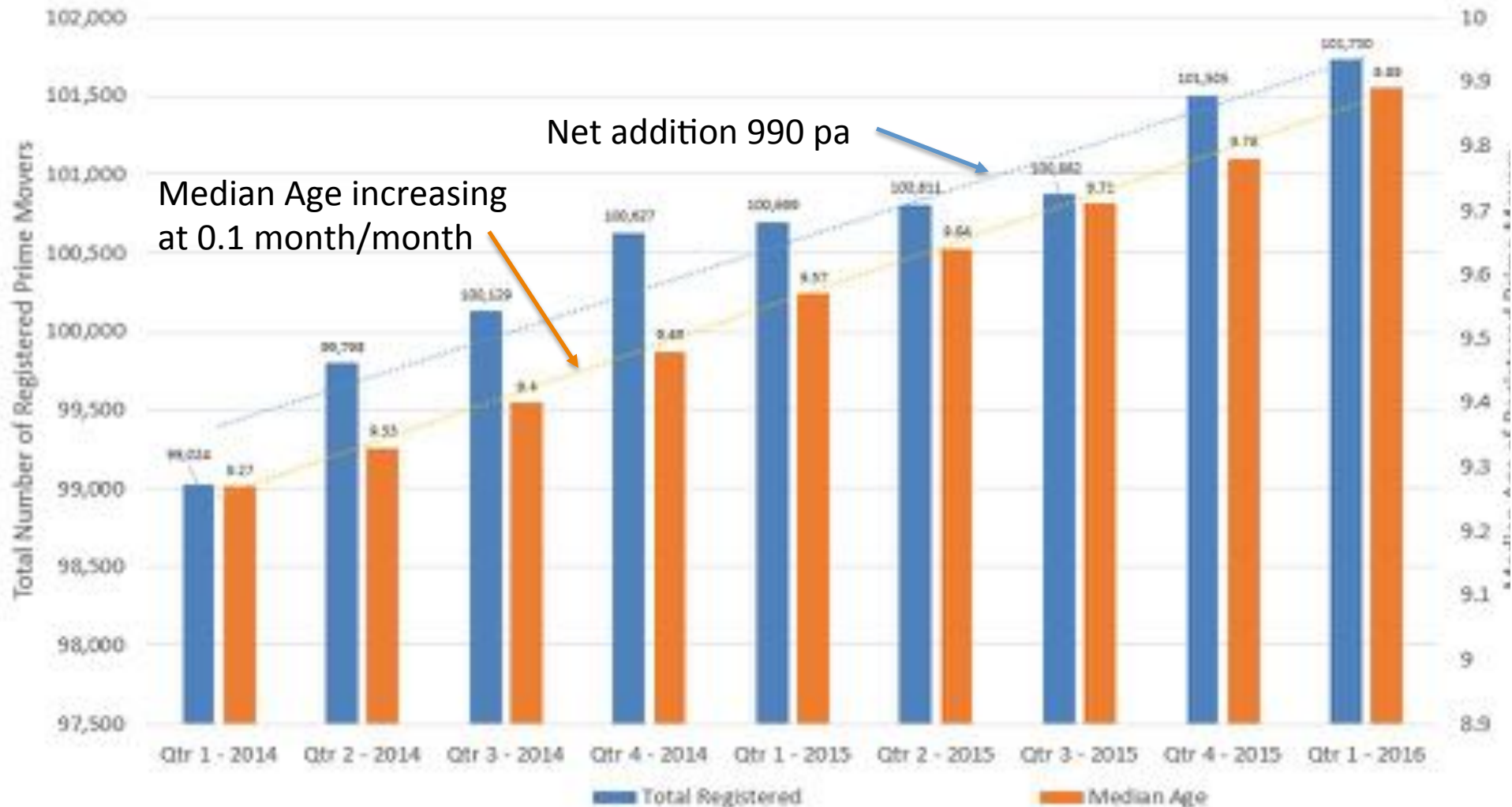
Size of the Heavy Duty Truck Fleet



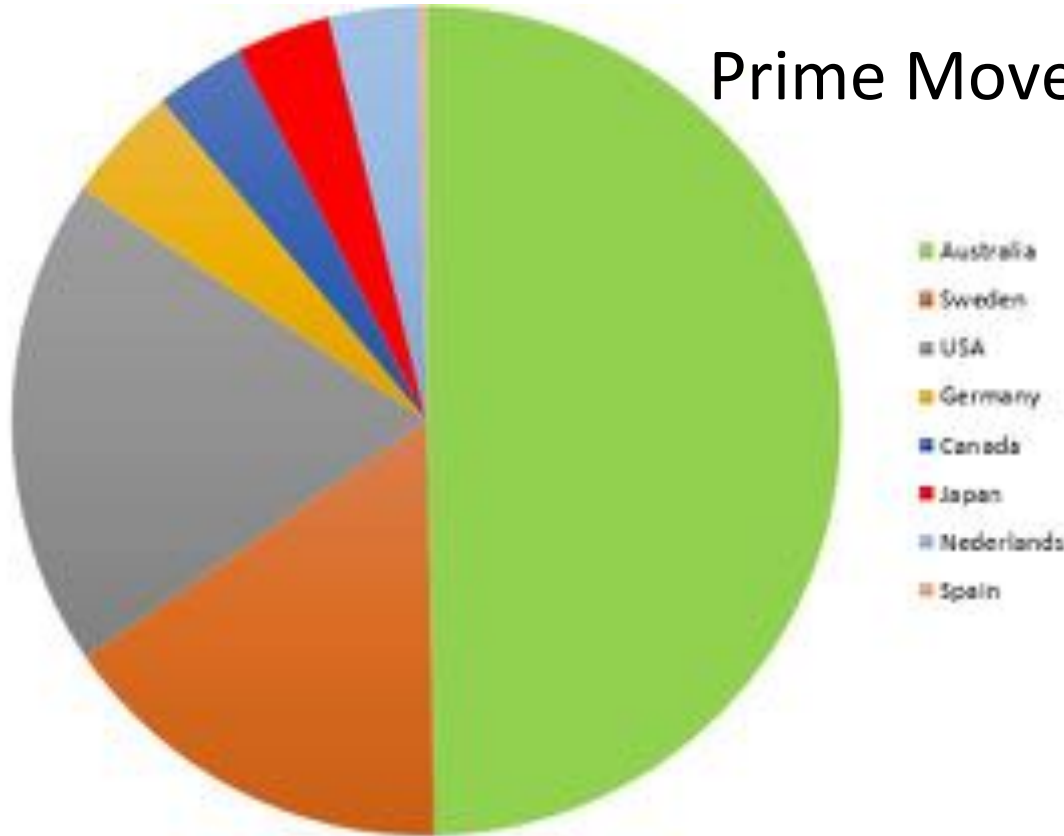
Prime Mover Trucks

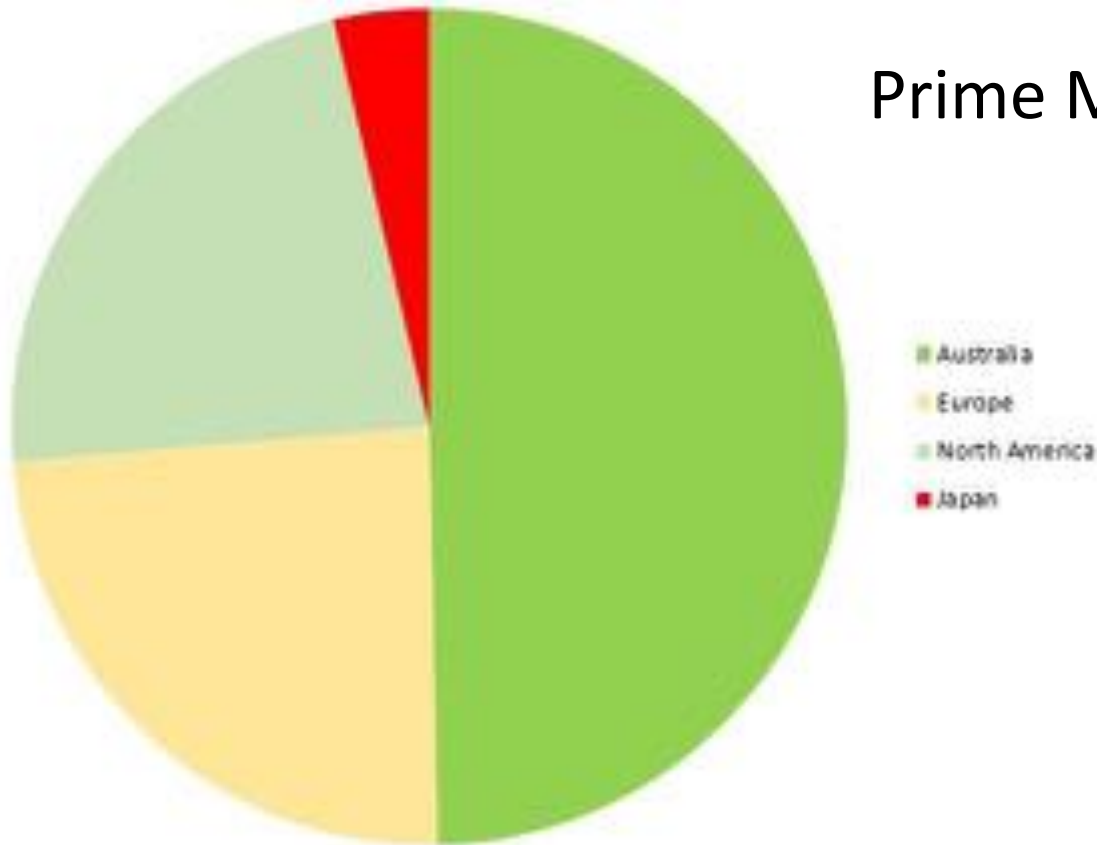


Heavy Duty Prime Mover Fleet



Prime Mover – Country of Origin



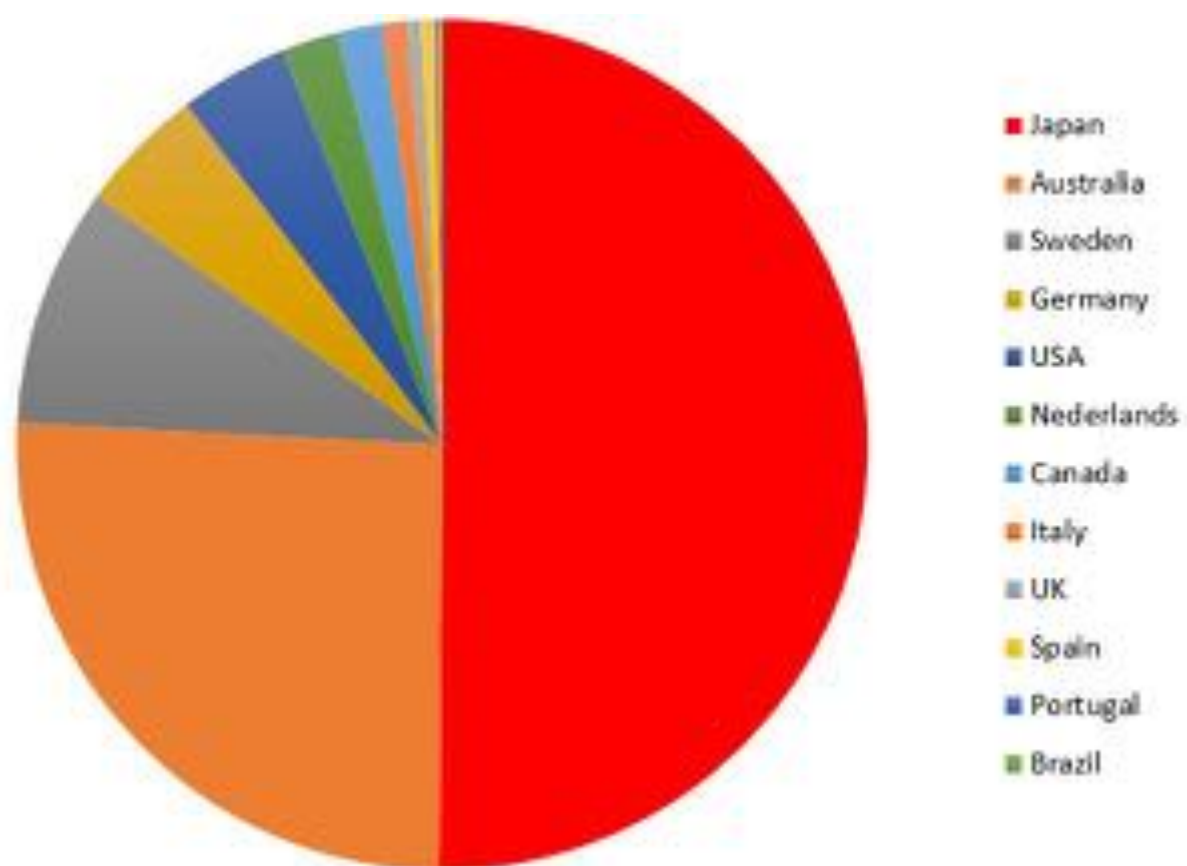


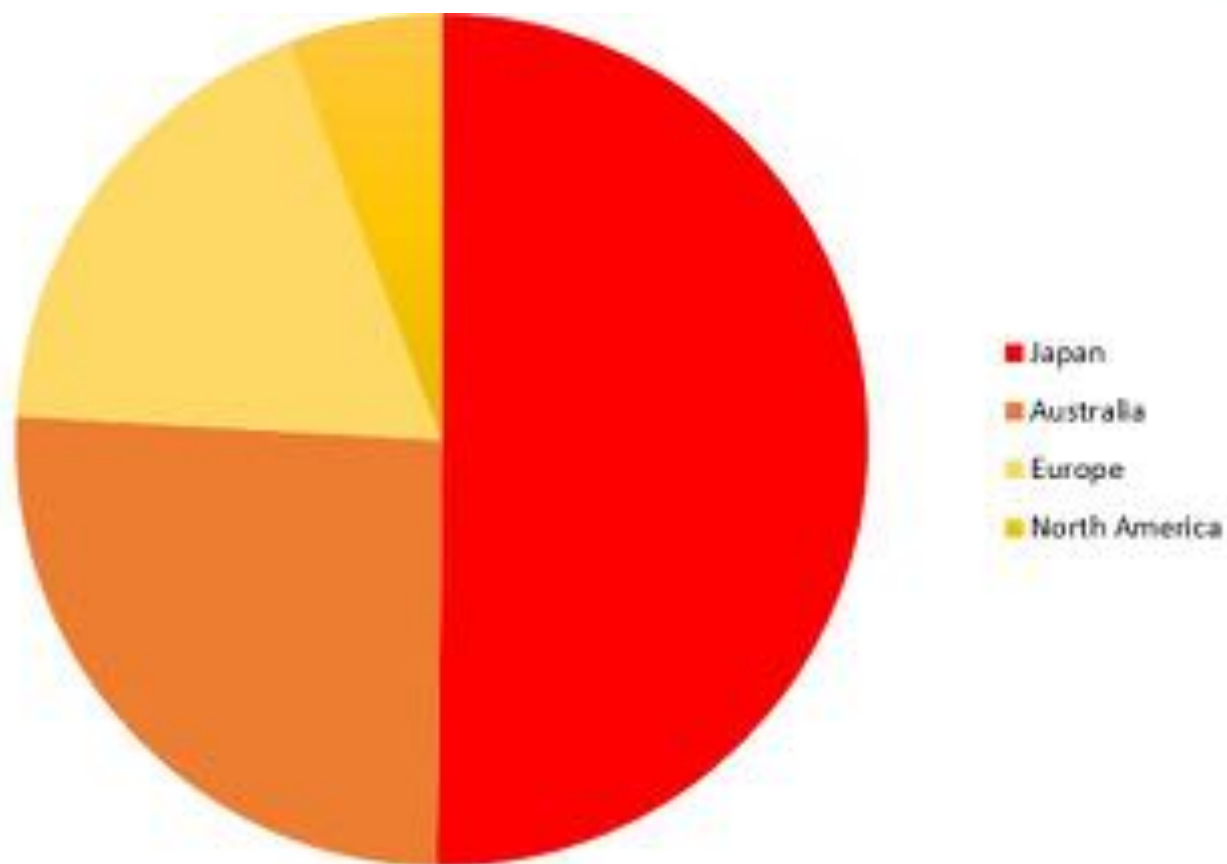
Prime Mover –
Region of Origin

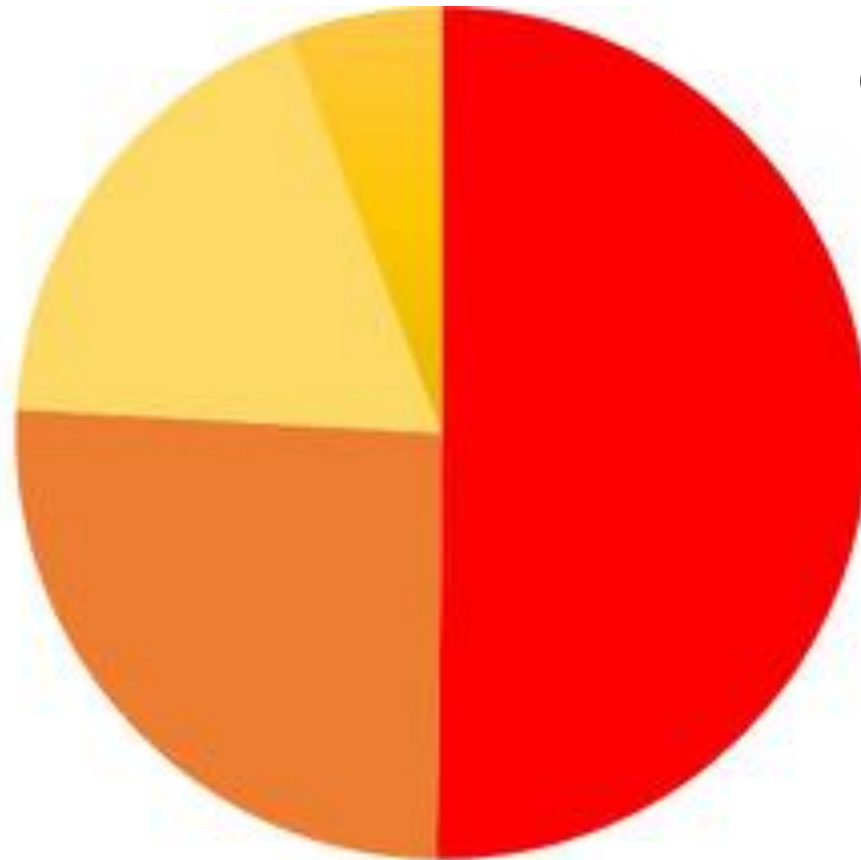


Heavy Rigid Trucks









China & Korea are insignificant

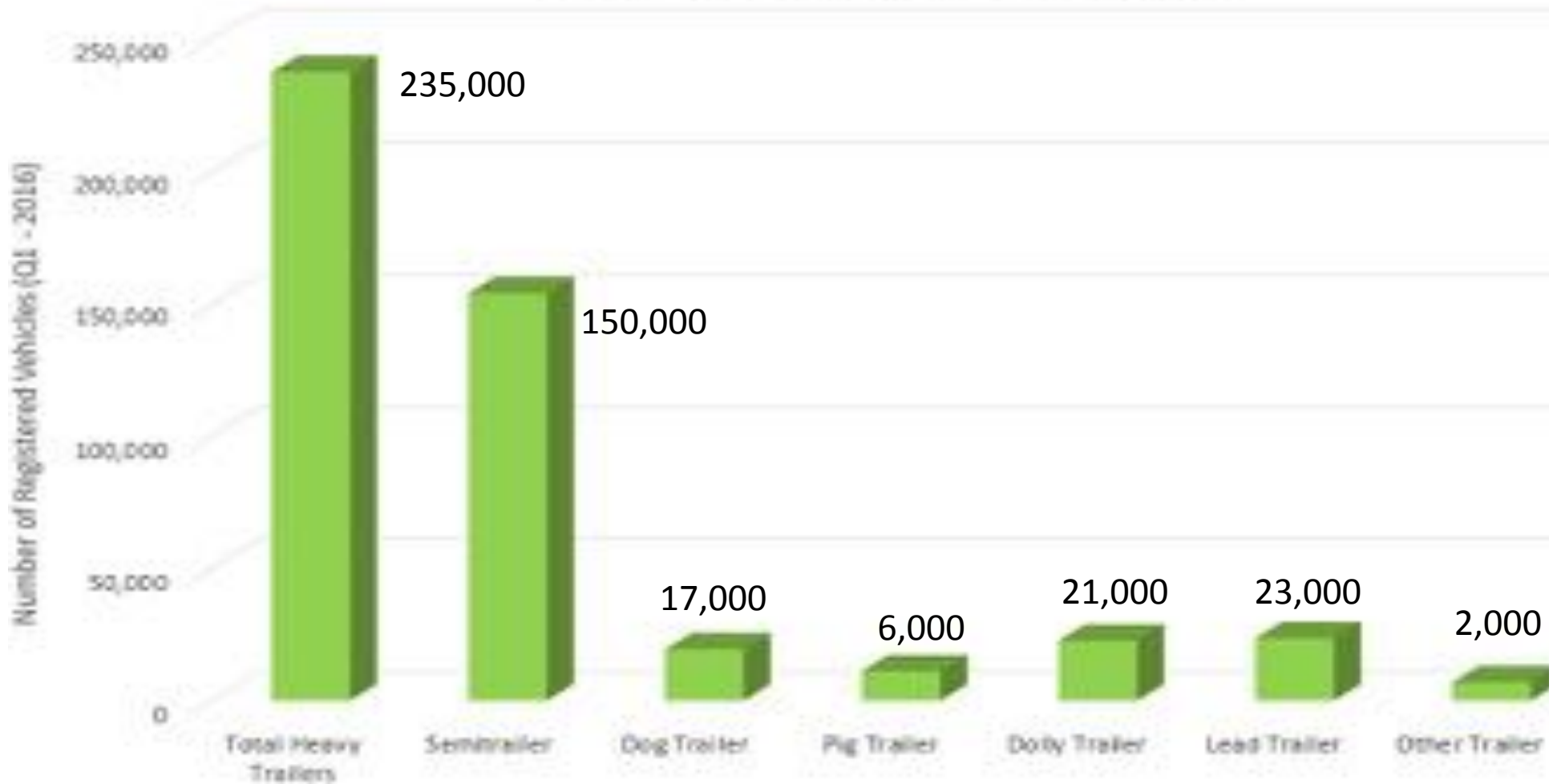
- Japan
- Australia
- Europe
- North America



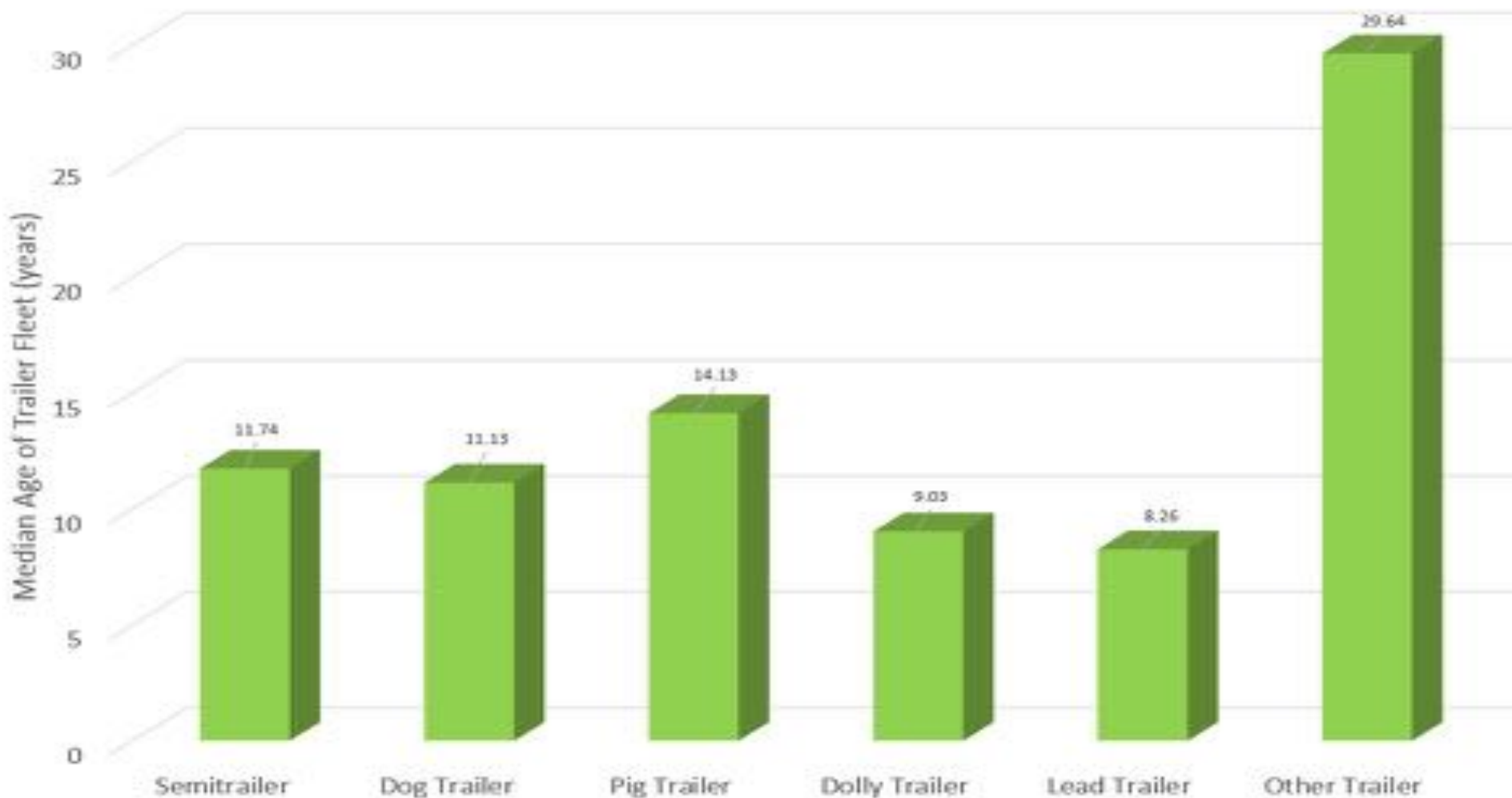
Heavy Trailers



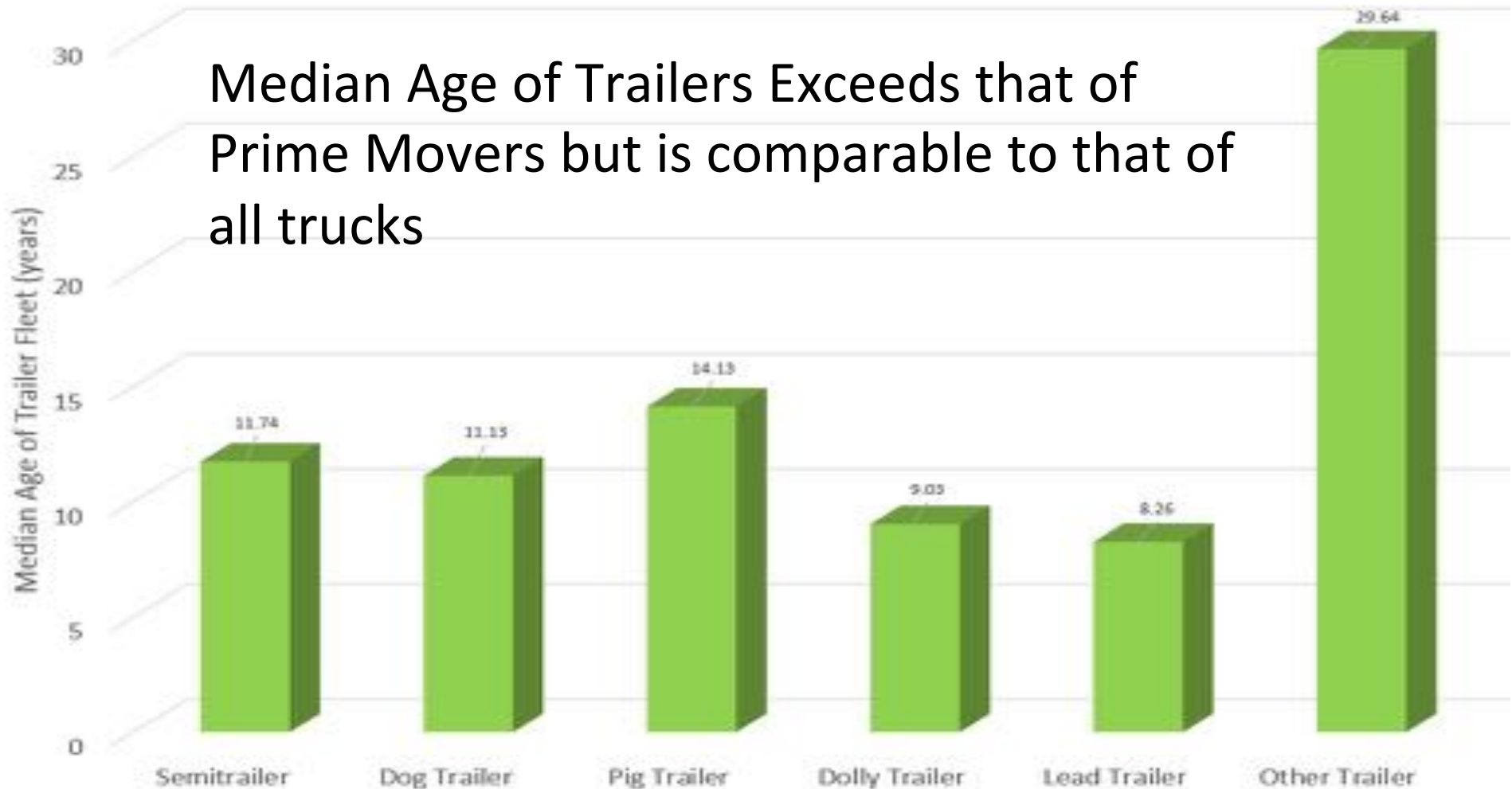
Size of the Heavy Duty Trailer Fleet



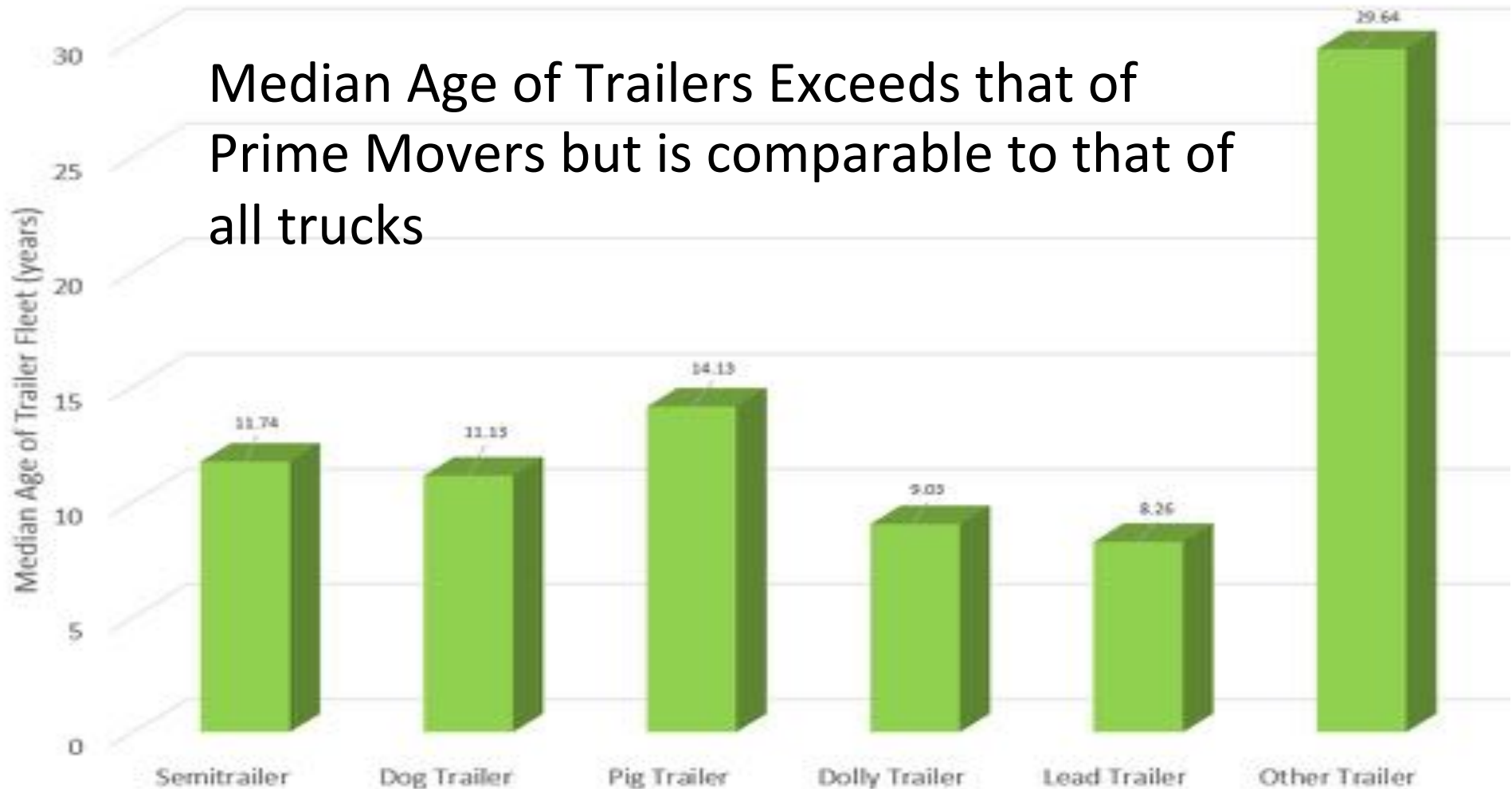
Median Age of Heavy Duty Trailer Fleet



Median Age of Heavy Duty Trailer Fleet



Median Age of Heavy Duty Trailer Fleet





Suppliers to the Market



Trailers

- There are 375 heavy-duty trailer suppliers in Australia.



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- There are 1,230 trailer 'ADR' models.



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- There are 1230 trailer 'ADR' models.
- The commercial value of the trailers sold annually is about \$1.5B.
- About 95 % of trailers are manufactured in Australia.



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- There are 1230 trailer 'ADR' models.
- The commercial value of the trailers sold annually is about \$1.5B.
- About 95 % of trailers are manufactured in Australia.
- Imports account for ~ 7% but are growing at ~ 20% pa.



Trucks

- There are 37 OEM heavy-duty truck suppliers in Australia.
- There are 127 truck 'ADR' models.
- The commercial value of the heavy-duty trucks sold annually is about \$2.8B.
- There is a truck modification industry worth another ~ \$0.8B.



Total Industry (12t+)

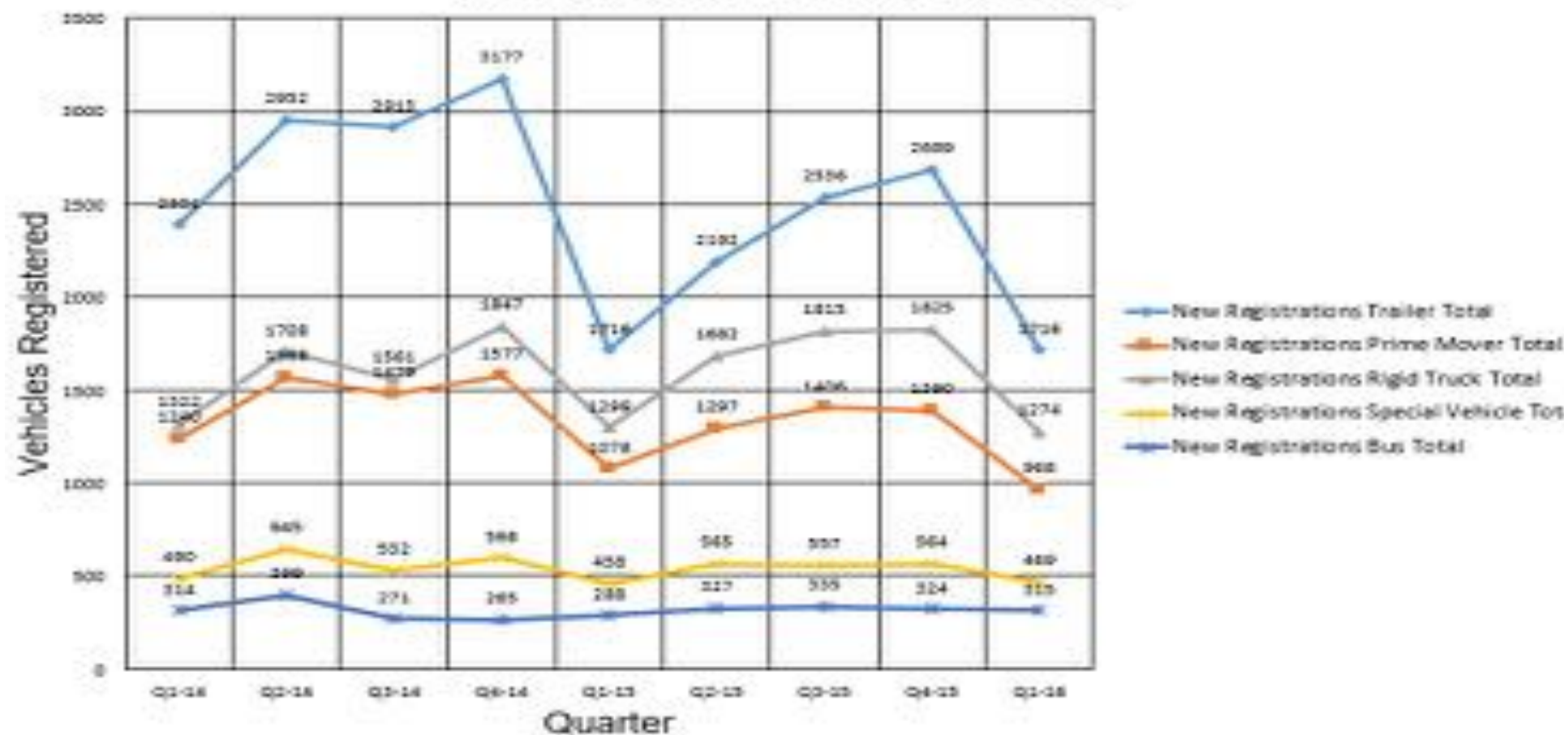
- \$1.6B (trailers) + \$2.8B (trucks) + \$0.8B (modifications) + \$0.9B (spare parts) + \$1.2 B (servicing)
- Heavy-duty road freight sector is a \$6.3B pa industry.



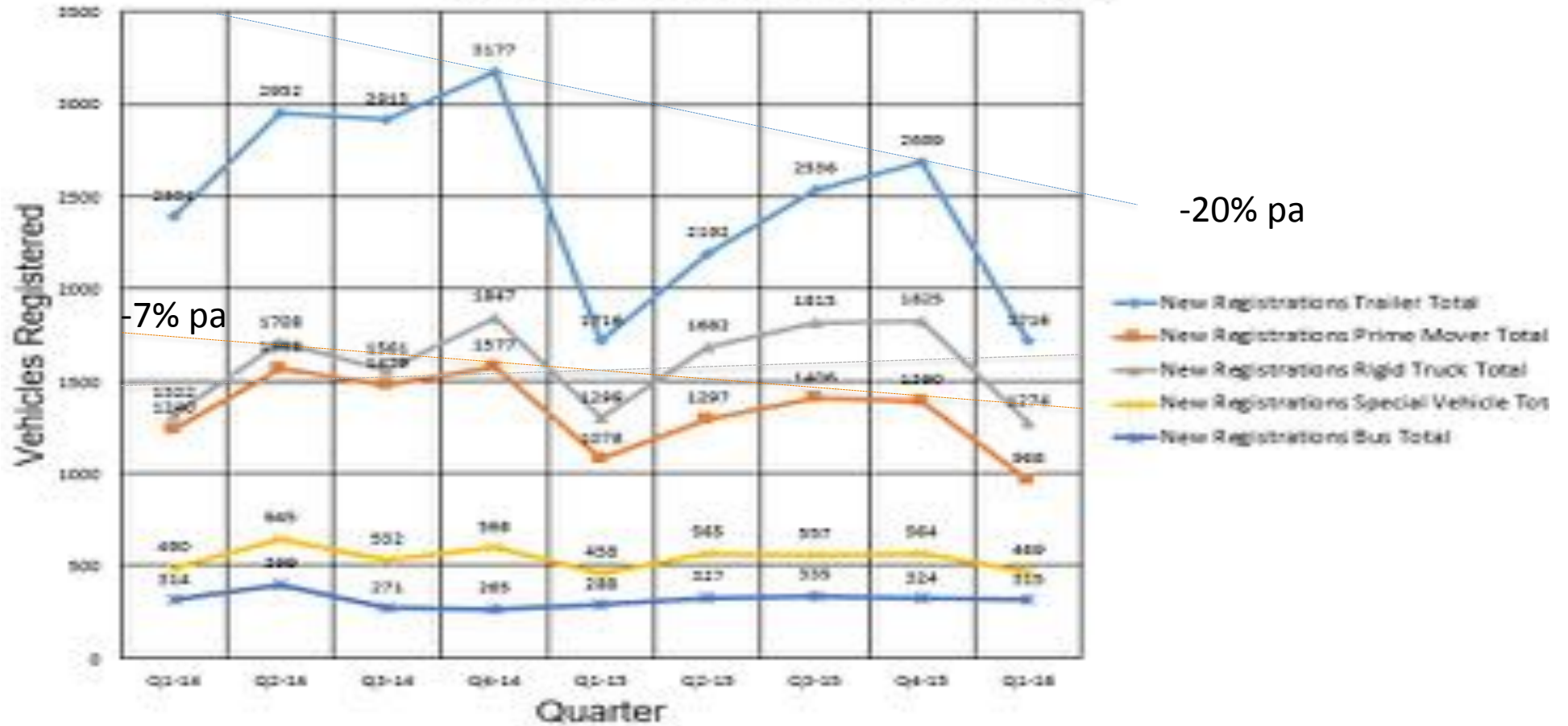
The Size of the Market



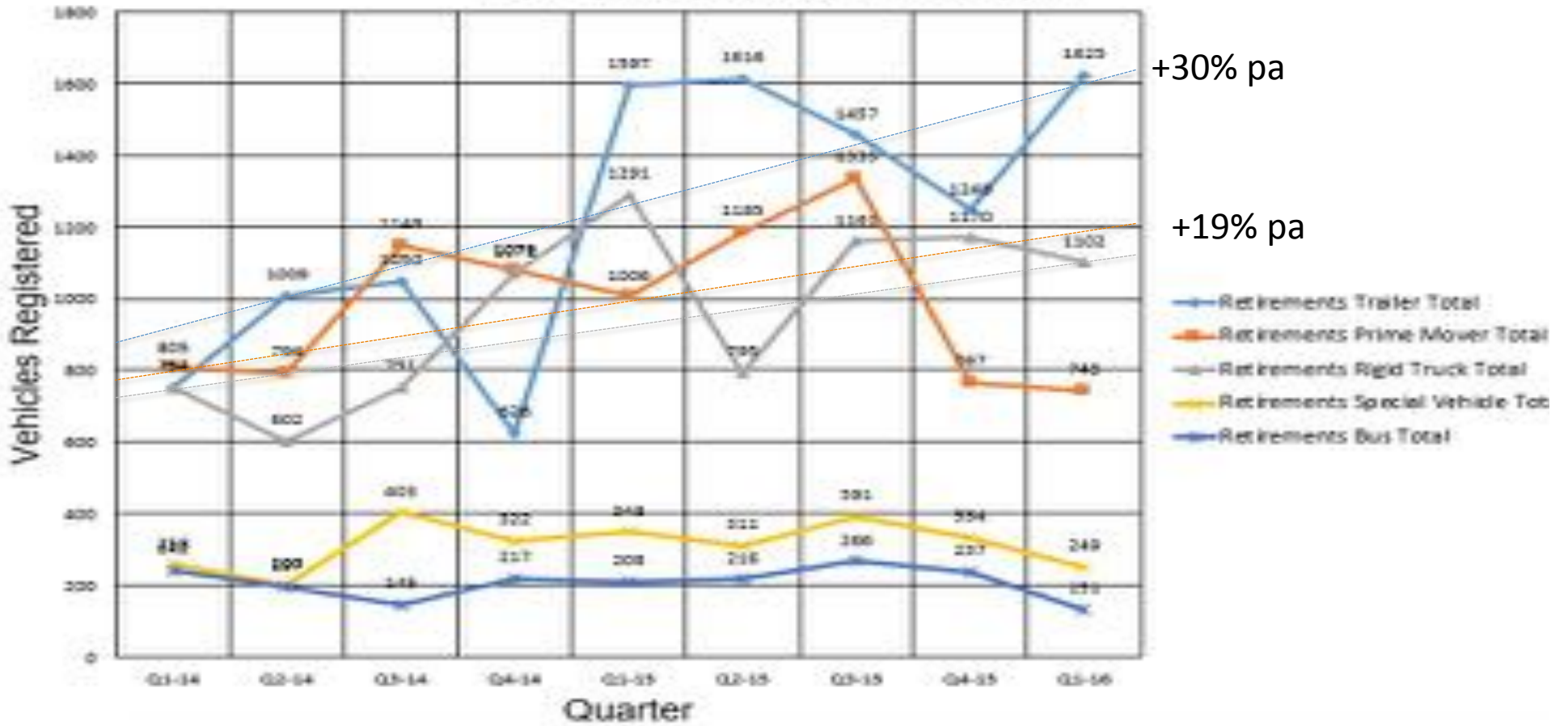
New Registrations By Type Per Quarter



New Registrations By Type Per Quarter



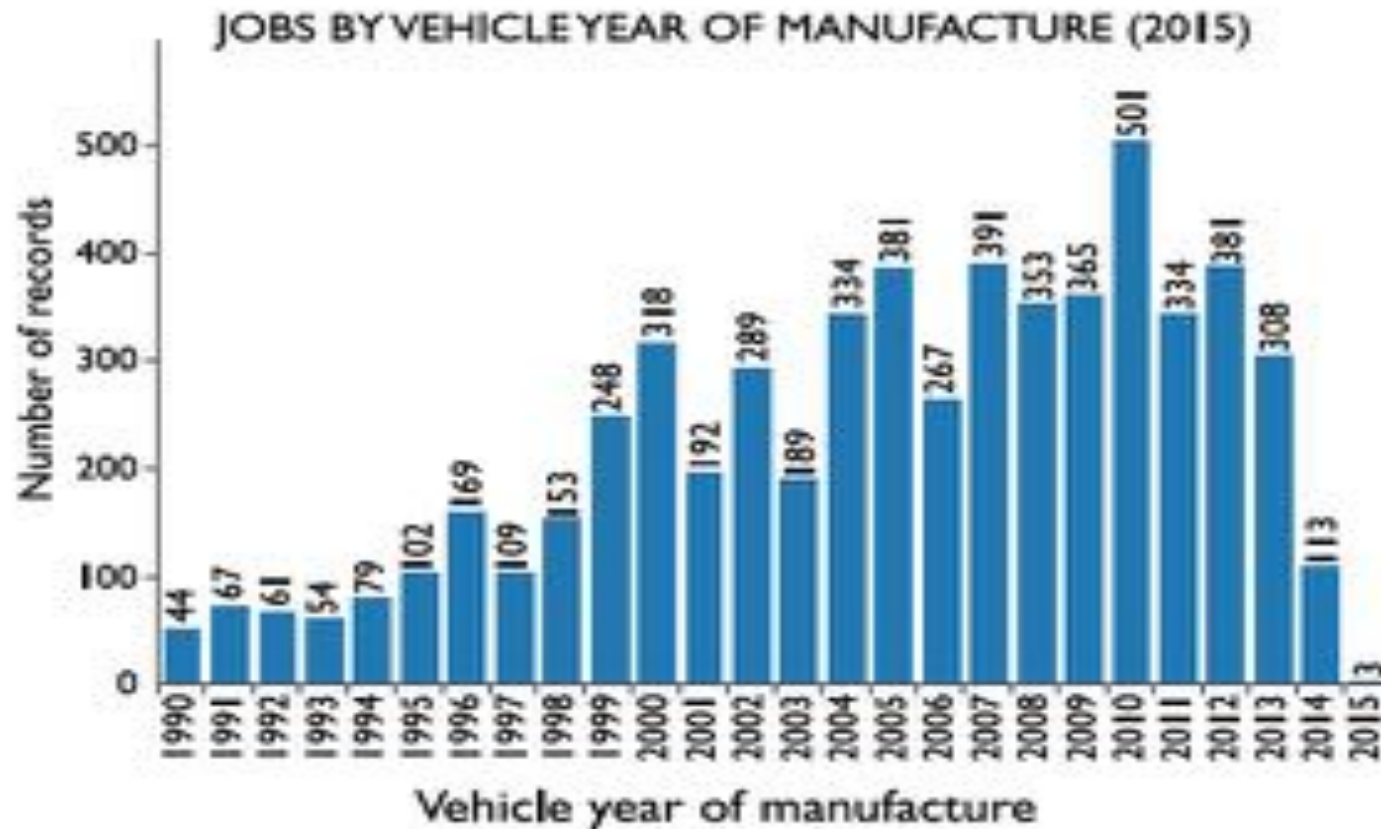
Retirements By Type Per Quarter



Age & Reliability

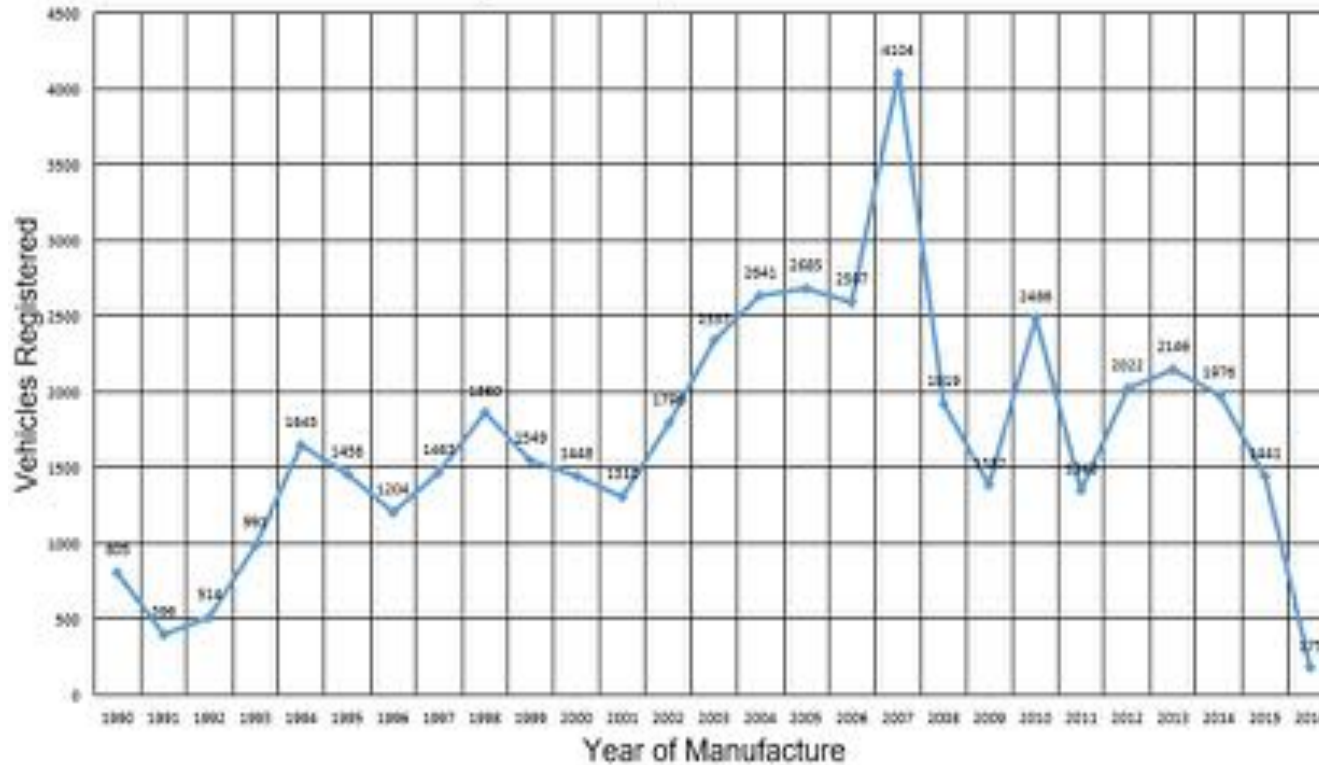


NRMA Breakdown Turnouts for Trucks



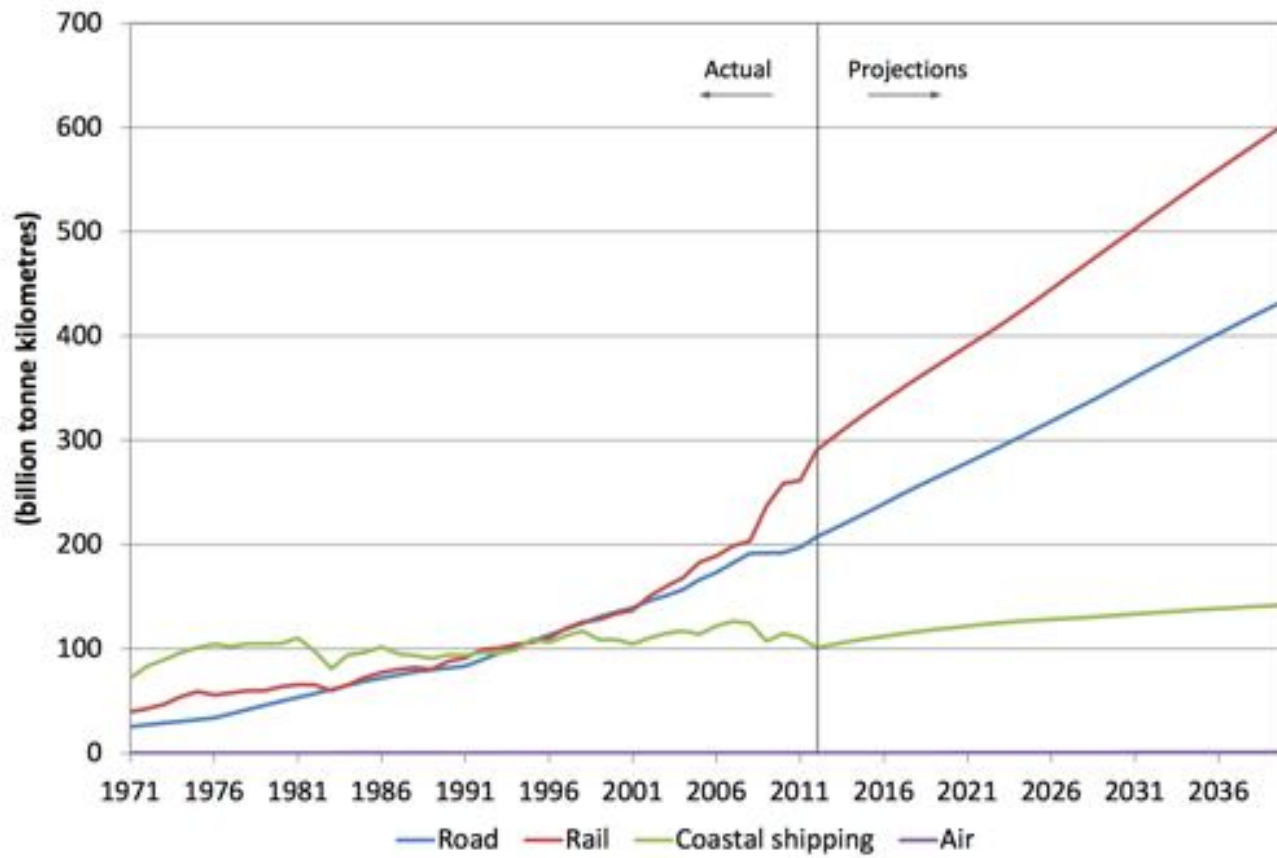
NRMA Breakdown Turnouts for Trucks

Registered 2SP3 per Year of Manufacture



Size of the Task





~ + 3% pa

Source: BITRE (2013a) and BITRE estimates.



Standards Applicable to Replacement Parts



Number of Mandated Standards for HD Truck and Trailer Replacement Parts =



Number of Mandated
Standards for HD Truck and
Trailer Replacement Parts =
Zero

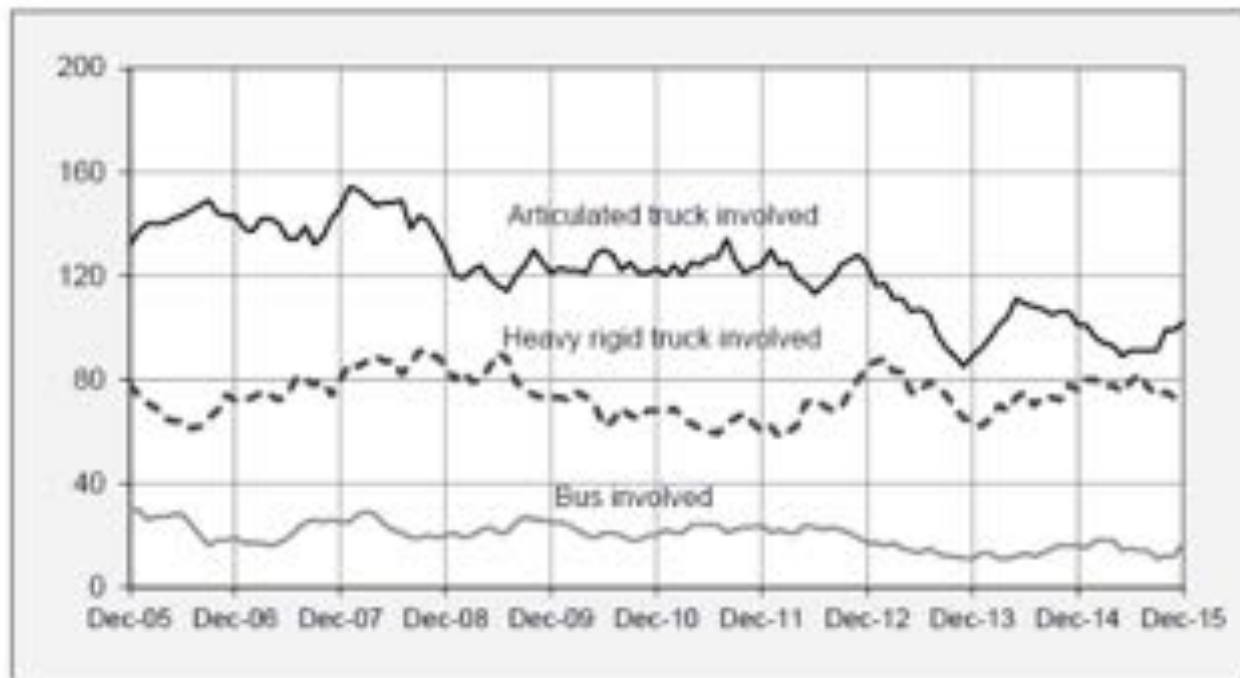


Safety of the Task



Fatal crashes involving heavy vehicles, Australia — moving annual total

(Each point shows the number of fatal crashes during the preceding 12 months)

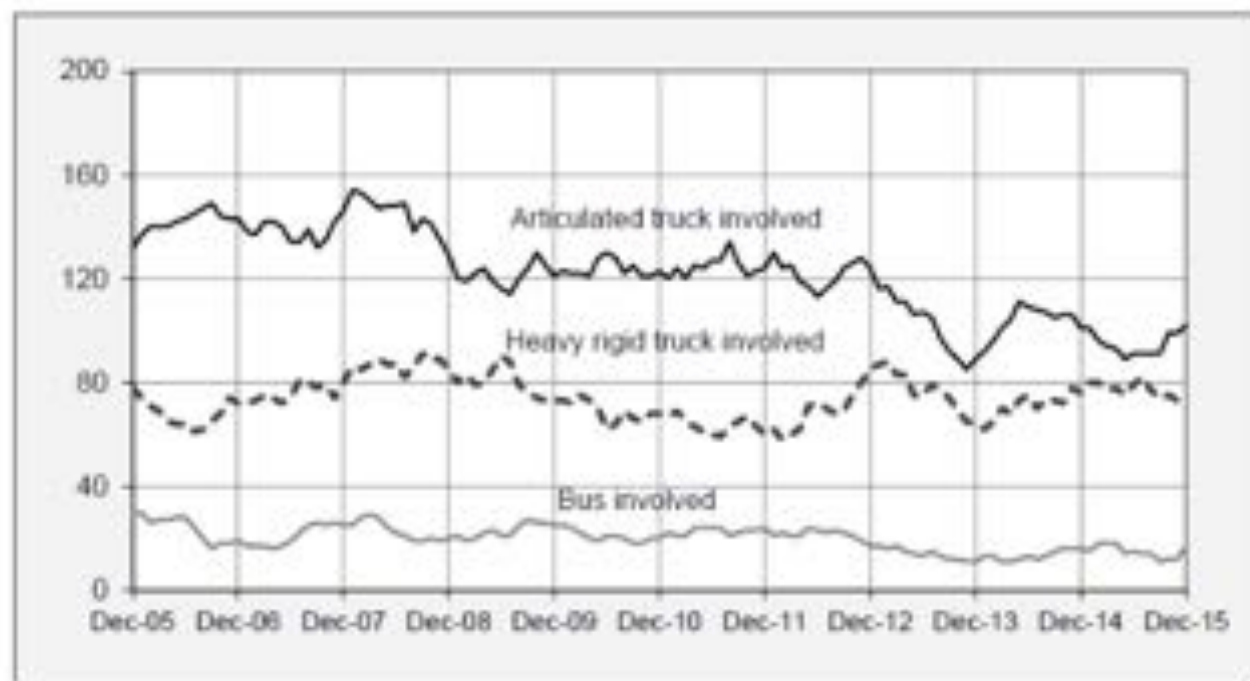


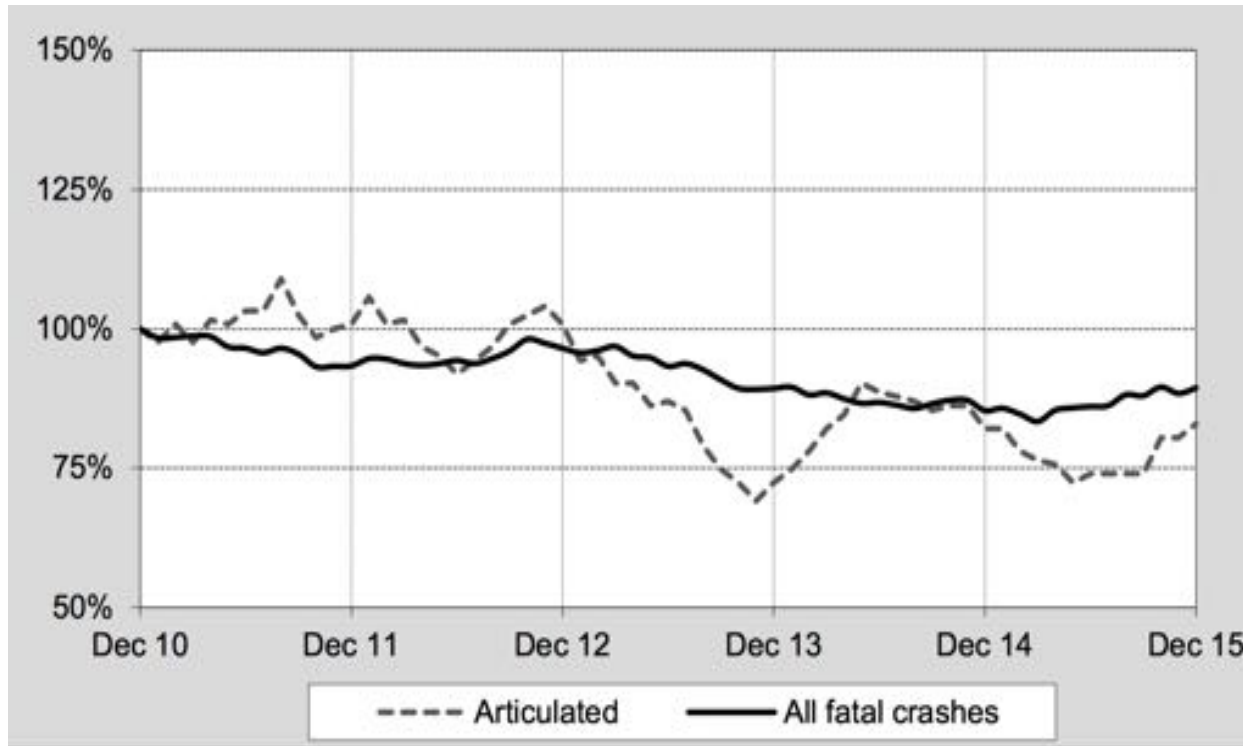
294 fatalities
pa.
About half are
HV drivers



Fatal crashes involving heavy vehicles, Australia — moving annual total

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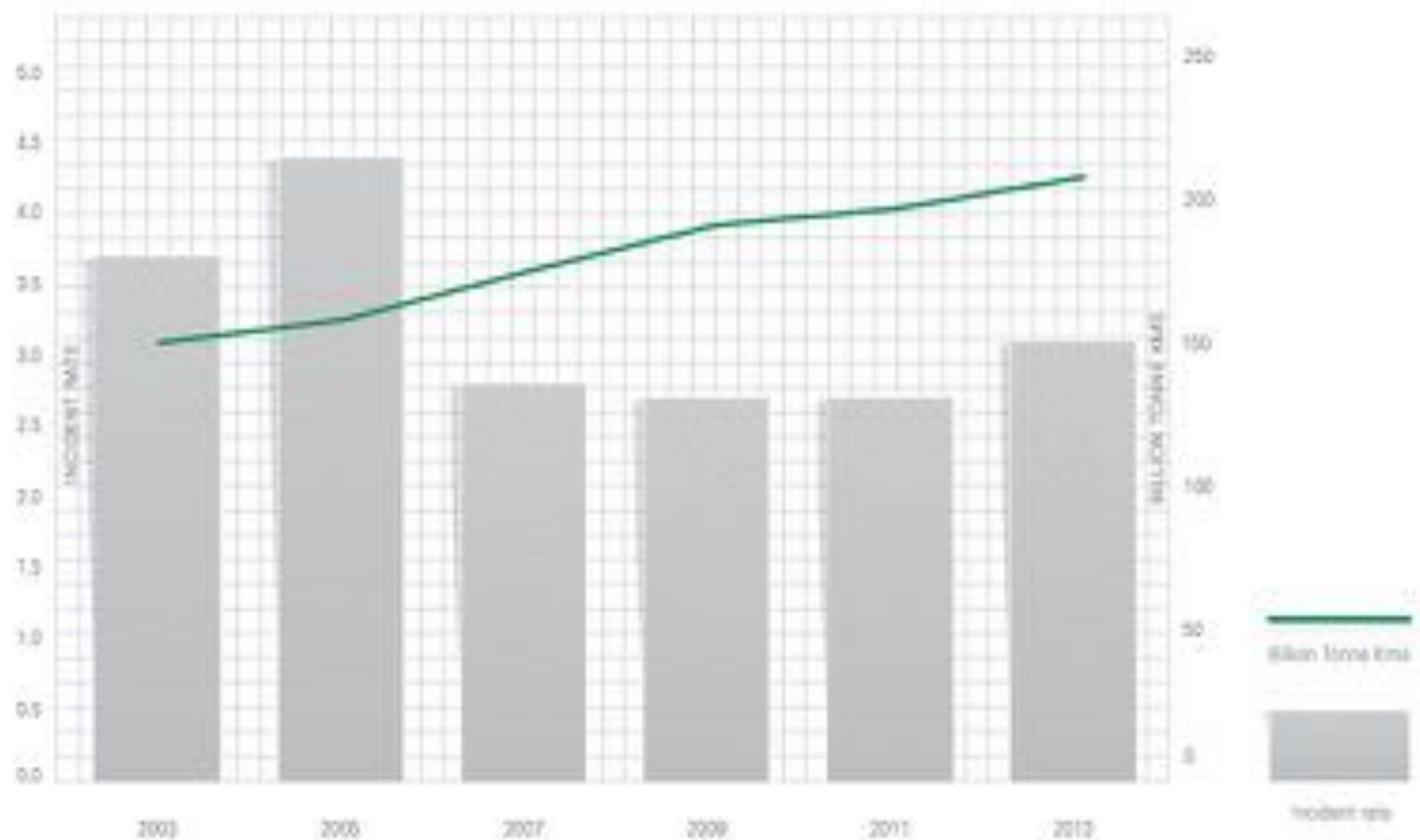
2015 MAJOR ACCIDENT INVESTIGATION REPORT

Covering major accidents in 2013.

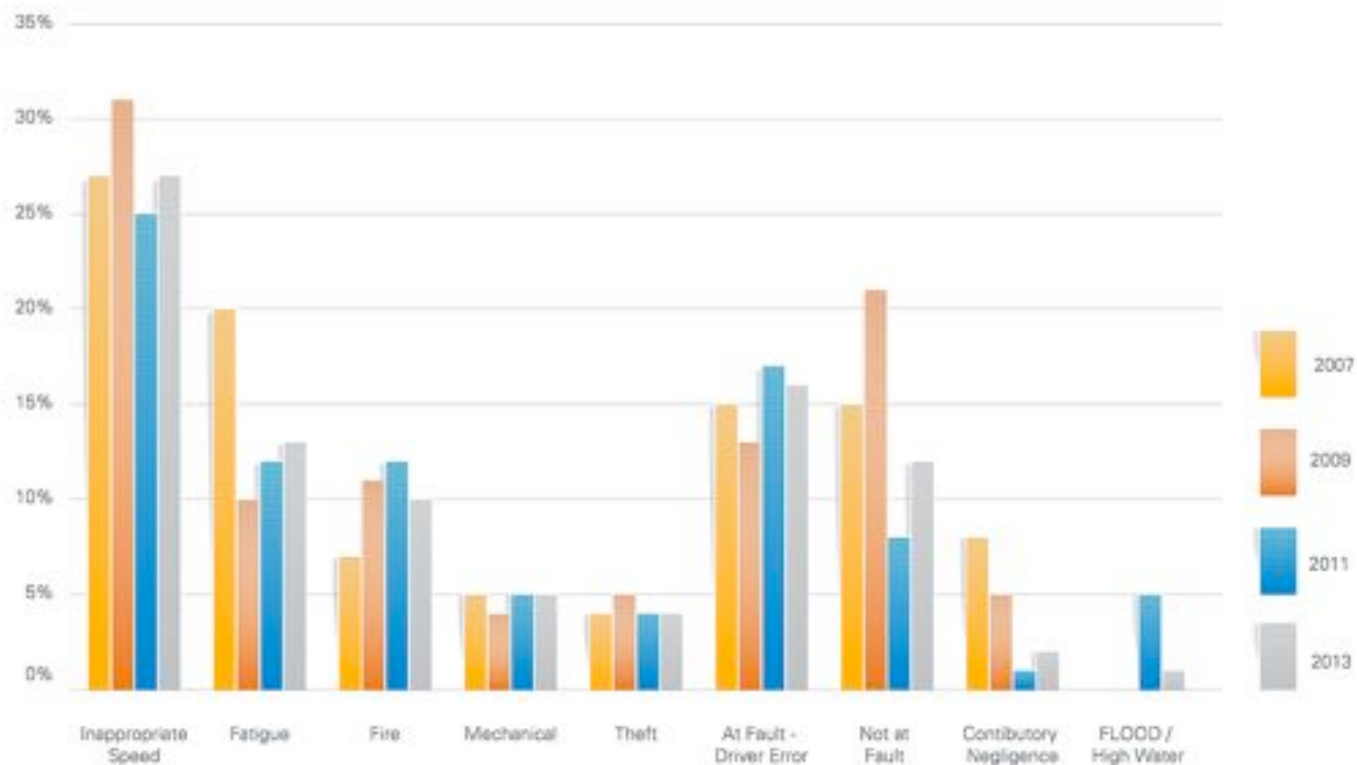


Total Fleet Growth vs Major Crashes





Accident Cause: Investigation Finding



- Fatigue at 12.8% was the worst result since 2007.
- Western Australia was noteworthy with the highest proportion (30%) of major crash incidents attributed to fatigue.
- Single vehicle accidents (SVA's) attributed to 71.8% of losses with the balance of 28.2% involving collisions with third party vehicles.



Main Points

- Registrations are static
- The freight task has stalled because of the mining boom, mainly affecting WA and Qld.
- There is a vibrant local supply industry.
- The local heavy-duty industry is ~ \$6.3B
- Our safety performance needs concerted effort and improvement.

