Market and fleet trends

Graph 1 - Annualized Truck Percentage Changes 2014

Graph 2 - Totals for the Truck Fleet (GVM ≥ 12t) at 13th October 2014

Graph 3 - Median Age of the Truck Fleet - 13th October 2014

Graph 4 - Annualized Trailer Percentage Changes 2014

Graph 5 - Totals for the Trailer Fleet (ATM ≥ 12t) at 13th October 2014

Graph 6 - Median Age of the Trailer Fleet - 13th October 2014
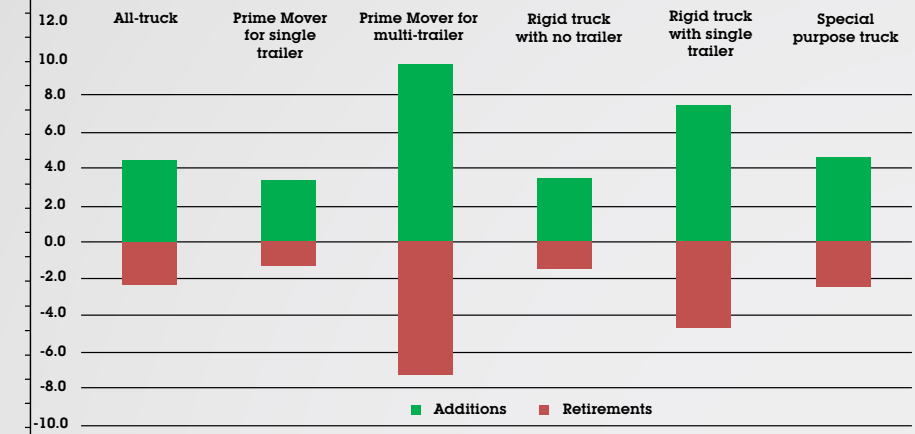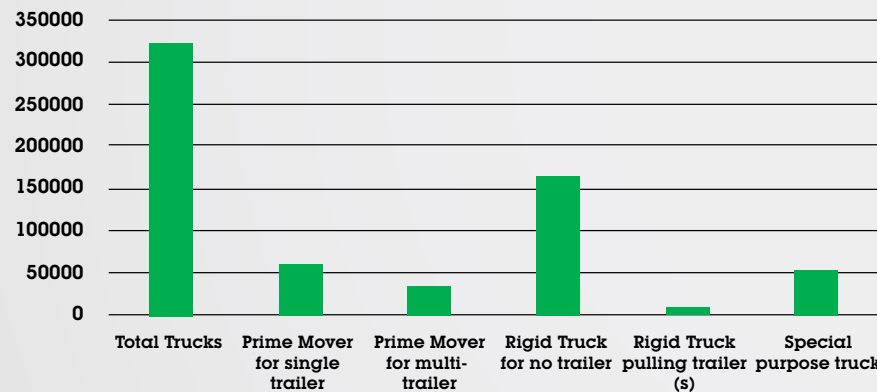

ARTSA has just published the third quarter report on the size and nature of the heavy vehicle fleet. The report is available for free on the ARTSA website to those who register. The statistics are derived from the national database of registered heavy vehicles that are compiled routinely from the State and Territory road agency data (NEVDIS). ARTSA gets selected data from NEVDIS each quarter and then analyses it to allocate a consistent registration charge code and function.

All the statistics reported in this article concern vehicles with a gross rating of 12t or more. The statistics paint an interesting picture of our industry for 2014. Graphs 1 and 4 show the annualised growth rates (based on the first three quarters in 2014). ARTSA has noticed that total registrations for vehicles built in each of the past three years (2012, 2013, 2014) go up each quarter whilst total registrations for vehicles built in years before (up to 2011) reduce. Newly registered vehicles may have been sitting in dealerships for the past two years.

Graphs 1, 2 and 3 give a snapshot of the Australian heavy-vehicle (GVM >12t) truck fleet. The annualised growth rate for all trucks is about four per cent and the retirement rate about two per cent. The annualised growth in prime movers for multi-combination vehicles is nearly 10 per cent.

The retirement rate is also high (seven per cent), which probably indicates that many of these prime movers are transferred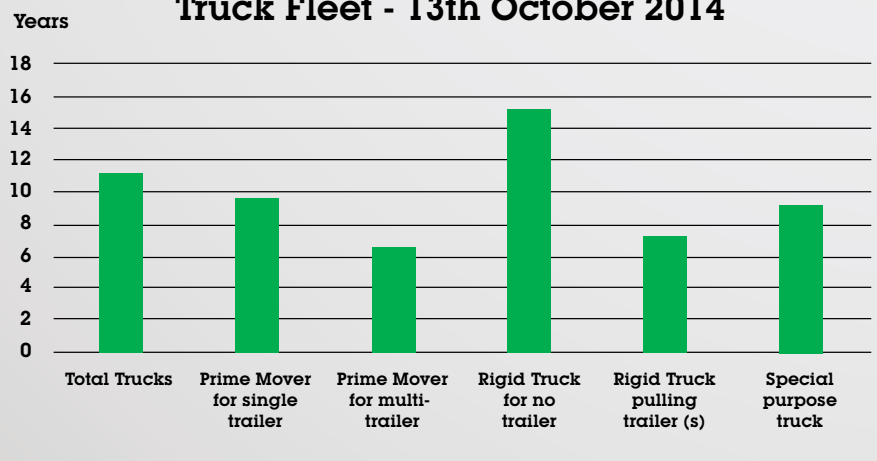 into single trailer service. This explanation probably explains why the retirement rate for single-trailer prime movers is only one per cent; older B-double prime movers get transferred to less arduous service. The growth rates for rigid trucks that are registered to pull a heavy trailer is also significantly higher than for rigid trucks registered to pull no heavy trailer. As for prime movers, it seems that rigid-trucks for trailer service are retired into applications without any trailer.

The growth rate for prime movers for multi-combination trailer work (B-doubles and road trains) is high. This classification now makes up about one third of the total prime mover fleet. Whilst the growth rate for rigid trucks registered to pull a heavy trailer is high, the total number of this classification is relatively small. These rigid trucks make up only about six per cent of the total heavy rigid trucks.

The median age of the truck fleet is shown in graph 3. Median age is the age for which there are equal numbers of younger and older vehicles in that classification. The youngest truck classification is prime mover for multi-combination (B-double and road train). It is this classification that is growing rapidly and carrying most of the long-distance freight. Remarkably, the median age of a Rigid-truck that is registered to pull no heavy-trailer is 15 years. A lot of these trucks are running around on suburban roads delivering parcels and furniture.

The snap shot for the heavy trailer fleet (ATM > 12t) is shown in Graphs 4, 5 and 6. The growth rate for the total trailer fleet is about five per cent pa. The retirement rate is a bit less than two per cent. The fastest growing trailer classification is lead-trailer. This is consistent with the high growth rate for prime mover for multi-combination trailer work as seen in Graph 1. The trailer totals show that semi-trailers greatly outnumber lead-trailers by seven to one. The semi-trailers are significantly older than the lead-trailer fleet. Semi-trailers must carry most of Australia's freight, even when in a multi-combination. The slowest growing trailer classification is pig trailer. This classification also has low total numbers. The 'other trailer' classification includes old trailers that cannot be classified because the registration code information is poor. They are not important for our considerations.
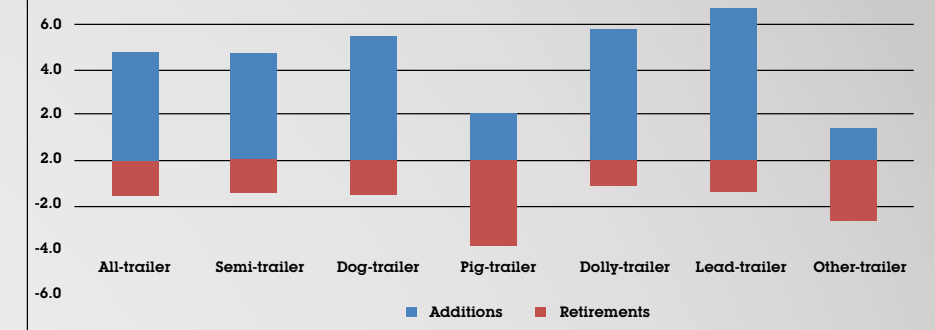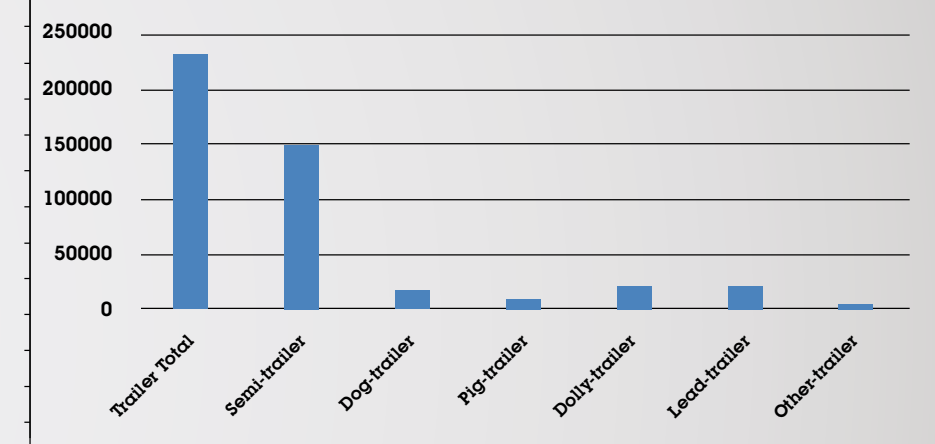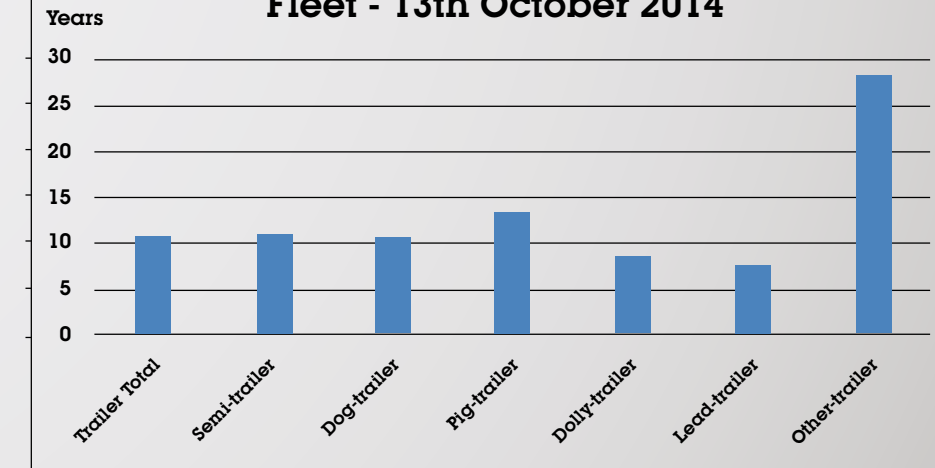
ARTSA has achieved its goal for 2014, which was to master the interpretation of the NEVDIS data and to issue fleet total reports. In 2015, ARTSA will offer specialised reports that break the fleet data up according to jurisdictions, number of axles and function. ARTSA will also offer custom reports for manufacturers and suppliers who seek very specific details about the Australian heavy vehicle fleet. We have only scratched the surface of what can be learnt.

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