



TRUCK INDUSTRY COUNCIL
SAFER GREENER ESSENTIAL



Sales of Zero Emission Trucks in Australia

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QTLC webinar- Flicking the Switch
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TODAY'S TRUCKS

TIC Members



ISUZU
TRUCKS



Daimler Trucks



SCANIA

IVECO



FOTON
MOBILITY



UD TRUCKS



Four themes:

1. The sales numbers (> 3.5t GVM)
2. Who's buying and why?
3. Road blocks (real and perceived)
4. What might 2030 look like (sales and market uptake)?

Diesel, Electric, Hydrogen: What's next for truck power

1. The sales numbers (>3.5t GVM):

Year	Total truck sales	Battery Electric truck sales	Diesel/Electric (Hybrid) truck sales	Total Low and Zero Emission trucks
2021	41,404	4 (0.01%)	22 (0.05%)	26 (0.06%)
2022	44,379	27 (0.06%)	72 (0.16%)	99 (0.22%)
2023	47,757	153 (0.32%)	214 (0.45%)	367 (0.77%)

Note: Does not include LDV Brand

Diesel, Electric, Hydrogen: What's next for truck power

1. The sales numbers (>3.5t GVM):

TIC Heavy Vehicle Segment	TIC Definition	Percentage of Sales	Majority Application
Light Van**	3501kg to 8000kg	0%	-
Light Truck	3501kg to 8000kg	83%	Urban/Metro distribution, back to base daily
Medium Truck	8001kg to 16000kg	16%	Urban/Metro distribution, back to base daily
Heavy Truck	Greater than 16000kg	1%	Urban/Metro distribution, back to base daily

** Does not include LDV Brand

2. Who's buying and why?

- Typically large and medium fleets (not small fleets, or owner drivers)
- Approx 10% indicated their purchase was for trials to determine the economic/operational feasibility of a BEV or Hybrid truck vs a diesel truck
- Over 80% of customers indicated their main reason for purchasing a zero emission truck was to meet Corporate Social Responsibility goals/targets
- No surveyed customer purchased a BEV truck believing its whole of life cost would be less than an equivalent diesel truck.....
- Metro/Urban use, generally freight distribution, back to base each day/night, slow charging (+4hrs) on freight company's premises
- Less than 10 of the 367 sales received any government financial assistance



3. Road Blocks - Real:

- Upfront purchase price (perceived?)
- Charging infrastructure, cost and availability (especially for leased premisses)
- No axle mass concessions (effects all zero emission trucks above 16t GVM)
- Still no 2.55m maximum vehicle width
- Unknown future/cost of Road User Charges
- Less vehicle flexibility
- Unknown resale value, Total Cost of Ownership (perceived?)
- Some, or all, of the above **lead to “uncertainty”** and it simply becomes easier for an operator to stay with what they know (diesel)

3. Road Blocks - Real:

- There is no viable technical or economic zero emission solution for many road transport sectors (linehaul, mass constrained freight, remote area)





3. Road Blocks - Perceived

- Upfront purchase price – lease or finance the truck
- Supply of trucks – TIC members could have provided 3 to 4 the number of trucks in 2023, it was customers who were missing!
- Unknown future price of electricity, or price relativity to diesel
- Unknown resale value - valid if the truck is purchased by operator, generally not an issue for leased trucks

4. What might 2030 look like(sales and market uptake)?

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2030 est	50,000	10,500 (21.0%)	2000 (4.0%)	12500 (25%)

All these sales total approx. 2-3% of the fleet in 2030



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