

Australia Freight and Logistics - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2017 - 2029

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Report description:

The Australia Freight and Logistics Market size is estimated at USD 94.10 billion in 2024, and is expected to reach USD 113.94 billion by 2029, growing at a CAGR of 3.9% during the forecast period (2024-2029).

Rising sector volumes due to increased infrastructure investment (USD 80 billion) by Australian Government

- The Australian truck industry has been hauling some interesting statistics of late. For example, truck traffic is expected to increase by 25% by the end of the decade. The pandemic has pushed parcel delivery volumes up by 80%, a key driving force behind truck demand. Employing more than half a million people, the transport industry has the second oldest workforce behind agriculture. The average age of a truck driver in Australia is 43.
- The maritime industry is a major part of Australia. The Port of Brisbane is the largest seaport in the state of Queensland. It is the third-busiest and fastest-growing port in all of Australia. This port is responsible for more than 28 million of cargo each year and 2600 ships and is ranked at the Maritime Security Level 1. Brisbane is well known for its strict environmental regulations and focus on ecological balance. However, they face an issue with sludge build-up that inhibits transportation and is costly to remove.
- The Australian government is investing AUD 110 billion (USD 79.58 billion) in land transport infrastructure across Australia over the next 10 years, from 2021 to 2022, through its rolling infrastructure pipeline, the majority of which is funded under the infrastructure investment program. As a result, the overall sector value is expected to grow during the forecast period.

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Australia Freight and Logistics Market Trends

Australia invested USD 120 billion in infrastructure projects, focusing on nation-building and land transport projects

- The Australian market encompassing transport, postal, and warehousing displayed growth across key metrics during the fiscal year 2021-22. Earnings within the transport industry division and its income value added (IVA) surged by 14.4% (amounting to USD 4.7 billion) and 15.0% (USD 10.8 billion), respectively. With a workforce of 122,810 individuals recorded by the end of June 2021, the transport support services subdivision accounted for 19.2% of the overall employment within the division, establishing itself as the second-largest employing subcategory after road transport.
- In 2022, the declines in division earnings were predominantly driven by a 7.6% decline in the transport support services sub-division, including airport activity. Around 62.7% decline in sales and service income for air and space transport reflected a significant decline in air travel due to COVID-19. Road freight transport is the largest employing sub-sector in the transport and logistics sector, followed by postal and courier pickup and delivery services and road passenger transport, with water transport support services employing the least number of people.
- The Australian Government remains resolutely dedicated to a robust 10-year infrastructure pipeline valued at USD 120 billion, focusing on delivering land transport projects that hold national significance and contribute to shaping the nation's future. The 2023-24 budget represents a stride forward in establishing an infrastructure investment pipeline integral to nation-building endeavors. This initiative forms the bedrock for constructing a sustainable and credible lineup of projects, selected based on diverse economic and societal goals, encompassing regional connectivity, quality of life enhancement, and safety enhancement.

Tightening global oil markets and the weakening Australian dollar led to an increase in fuel prices in Australia

- In 2021-2022, diesel prices rose by 40.1%, reaching 176 cents per liter (USD 1.76). Diesel prices tend to follow trends in the global price of crude oil, with oil prices projected to rise sharply in the current year. With global oil consumption recovering following the COVID-19 pandemic, supply concerns led oil prices to rise again due to the Russia-Ukraine conflict in 2022-23, thus increasing retail diesel prices. The federal government implemented a temporary 50% reduction in the fuel excise in March 2022 to help offset rising costs, which ended in September with the fuel excise returning to its full rate, causing motorists to pay more at the pump.
- Petrol prices in Australia's major cities climbed to an average of USD 1.18 per liter in October 2021, the highest since 2014, when adjusted for inflation. While prices plummeted to record lows during the COVID-19 outbreak in 2020, the cost of fuel in Australia has risen steadily since November 2020.
- According to the Australian Institute of Petroleum, the average retail price for petrol in Australia hit 196.5 cents (USD 1.96) in August 2023. Since the federal government's halving of the fuel excise ended last September, the national average weekly petrol price has been hovering around 175 to 180 cents a liter (USD 1.75-1.8). The average weekly petrol price in the capital cities sits at 197.5 cents a liter (USD 1.97), with Sydney, Adelaide and Hobart recording an average weekly price of more than USD 2 a liter, while Brisbane had the cheapest average price of 188.2 cents a liter (USD 1.882). Also, the average national price for diesel hit a near eight-month high of 206.9 cents a liter (USD 2.06). Tightening global oil markets and a weakening Australian dollar are responsible for rising petrol prices.

Australia Freight and Logistics Industry Overview

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The Australia Freight and Logistics Market is fragmented, with the top five companies occupying 12.18%. The major players in this market are Aurizon Holdings Limited, Deutsche Post DHL Group, FedEx, Linfox Pty Ltd and Qube Holdings Ltd (sorted alphabetically).

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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