

## **Australia Road Freight Transport - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

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### **Report description:**

The Australia Road Freight Transport Market size is estimated at 43.23 billion USD in 2025, and is expected to reach 53.11 billion USD by 2030, growing at a CAGR of 4.20% during the forecast period (2025-2030).

Growing e-commerce sector in the country driving the demand for road freight market

- The retail sector in Australia experienced a slowdown in spending growth in 2023, dropping from 9.3% to 2% YoY. However, economic stimuli such as interest rate adjustments and tax cuts are expected to boost consumer spending power by an estimated USD 50 billion in fiscal year 2025, potentially revitalizing the sector by the end of 2024. Despite the overall slowdown, the e-commerce industry in Australia grew by over 6% YoY, supported by growing households that are embracing online shopping. This drove the demand for road freight services.
- In 2022, Senex, an oil and natural gas company, signed off on more than USD 1 billion of works to expand its natural gas developments in Queensland, which is estimated to supply 40% of the state's demand by 2025. Furthermore, in May 2024, the government released its Future Gas Strategy, putting natural gas at the center of its plans. A part of the strategy pushes Australia to obtain "new sources of gas supply" as they are needed to meet demand during the economy-wide transition to net zero by 2050. This increasing investment in Australia is expected to impact the future of the road freight market.

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## Australia Road Freight Transport Market Trends

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

- The Australian Government remains resolutely dedicated to a 10-year infrastructure pipeline (till 2032) 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 represented a stride forward in establishing an infrastructure investment pipeline integral to nation-building endeavors. This initiative formed 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.
- Till 2028, USD 11.8 billion will be spent on new rail and transport projects in Western Australia, as part of the state's USD 42.4 billion infrastructure investment. The 2024-25 State Budget includes USD 4.8 billion for the METRONET program, with USD 2.9 billion from the Commonwealth Government. This budget adds USD 254 million for METRONET, with the Morley-Ellenbrook Line set to finish by the end of 2024, and three more major rail projects the Victoria Park-Canning Level Crossing Removal, Byford Rail Extension, and Thornlie-Cockburn Link expected in 2025.

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

- In March of 2024, retail petrol prices in Australia's five largest cities were lower, averaging 193.2 cents per litre (USD 1.93), down from 194.9 cpl (USD 1.94) in Q4 of 2023. However, daily average prices hit a new high in April. Among the cities, Perth saw the biggest drop (4.1 cpl), while Brisbane's prices increased by 1.4 cpl, making Brisbane the highest at 200 cpl (USD 2). In April 2024, although average retail petrol prices in Australia were not at their all-time highest when adjusted for inflation, recent international and geopolitical events have kept petrol prices relatively high.
- Australia's federal government will introduce a new fuel efficiency standard for passenger and light commercial vehicles starting January 1, 2025. This follows a one-month consultation period before drafting the new laws. Announced as part of the 2023 budget and linked to the EV strategy released in April 2023, the standard sets average CO2 targets for vehicle manufacturers. These targets will gradually decrease, requiring the production of more fuel-efficient and low or zero-emissions vehicles.

## Australia Road Freight Transport Industry Overview

The Australia Road Freight Transport Market is fragmented, with the major five players in this market being K&S Group, Lindsay Australia Limited, Linfox Pty Ltd., LINX Cargo Care Group and Mainfreight (sorted alphabetically).

Additional Benefits:

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

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