

Australia Recreational Vehicle - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

Market Report | 2026-02-09 | 180 pages | Mordor Intelligence

AVAILABLE LICENSES:

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

Report description:

Australia Recreational Vehicle Market Analysis

The Australia RV market was valued at 3.11 million units in 2025 and estimated to grow from 3.29 million units in 2026 to reach 4.38 million units by 2031, at a CAGR of 5.88% during the forecast period (2026-2031). Demand benefits from a resilient domestic-tourism culture, federal rebates for locally-produced caravans and a manufacturing revival clustered in Victoria. Towable RVs lead current sales, electric-hybrid motorhomes record the fastest growth pace, and rental fleets continue to outpace retail purchases. Infrastructure upgrades, demographic shifts and expanding luxury holiday-park networks create clear opportunities, while supply-chain volatility and financing costs temper near-term momentum. Competitive advantages accrue to brands with vertical integration, accredited quality systems and advanced off-grid technologies.

Australia Recreational Vehicle Market Trends and Insights

Federal Rebates for Locally-Made Caravans

Rebates for Australian-built caravans stimulate immediate sales while anchoring skilled jobs in Victoria's revitalized manufacturing belts. These incentives dovetail with the federal reconstruction fund, steering capital toward sovereign capability and insulating producers from import volatility. Manufacturers enjoy stronger pricing power because buyers can offset higher specifications with rebate savings. Over time, the scheme fosters export potential as accredited plants scale production efficiencies.

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Domestic Road-Trip Tourism Resurgence

In 2024, Australians took 15.2 million trips for caravanning and camping, including glamping, as reported by the Australian Trade and Investment Commission. This consistent trend underscores a significant cultural shift towards local exploration. New South Wales alone hosted a significant number of caravan nights, a record that lifted park revenues earmarked for amenity upgrades. Families cite cost-of-living pressures and a lower environmental footprint as prime motivators for choosing road trips over flights. Higher visitor density accelerates the rollout of premium parks equipped with fast Wi-Fi, EV chargers and resort-style pools. The virtuous cycle of demand and reinvestment positions domestic tourism as a durable growth engine.

Supply-Chain Volatility for Chassis and Components

Pandemic-era disruptions exposed the industry's reliance on a handful of chassis and axle suppliers, leading to extended lead times and quality lapses. A survey revealed that majority of caravan owners encountered defects, eroding consumer trust and inflating warranty provisions. Smaller builders without long-term contracts face spot-market pricing, compressing already thin margins. The Caravan Industry Association presses for type-approval protocols to elevate compliance and deter opportunistic entrants. Until resilience measures mature, production schedules remain vulnerable to global logistics shocks.

Other drivers and restraints analyzed in the detailed report include:

Ageing "Grey-Nomad" Demographic Growth
Expansion of Caravan-Park Infrastructure and Luxury Holiday Parks
Rising Interest Rates on RV Financing

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Towable RVs held 64.32% Australia RV market share in 2025, illustrating widespread consumer preference for flexible, cost-efficient recreation. Travel trailers dominate through compatibility with existing passenger vehicles, while fifth-wheel trailers carve out a premium slice for long-term travelers seeking residential comfort. Folding camp trailers and truck campers fill niche off-road and compact-storage needs, reinforcing the breadth of towable solutions available. Manufacturers leverage modular chassis, lightweight composites and independent-suspension systems to raise durability and off-grid capability.

Electric-hybrid motorhomes are on track for a 10.18% CAGR, reflecting heightened environmental awareness and rapid battery-cost declines. Innovations such as roof-integrated solar panels, 48-volt lithium packs and regenerative braking extend off-grid range, narrowing the performance gap with diesel platforms. Type B and Type C layouts gain favor for their maneuverability and lower running costs, whereas Type A models retain a luxury audience willing to absorb higher fuel expenditure.

Private use accounted for 79.15% of Australia RV market share in 2025, sustained by the celebrated "big lap" ethos and federal incentives that reward local purchases. Buyers increasingly demand solar-battery suites, air-bag suspension and smart-home interfaces that transform caravanning into a connected, year-round lifestyle. This user sophistication pushes average transaction values higher but also fosters a robust aftermarket for upgrades and retrofits.

Commercial fleets are rising at 7.31% CAGR as rental operators scale to meet peak-season demand from domestic and inbound tourists. Capital-light business models enable rapid vehicle refresh cycles that introduce the latest safety and infotainment technologies. Fleet managers exploit dynamic pricing and app-based booking systems to maximize utilization, while electrified 4WD campers appeal to environmentally conscious adventure travelers.

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

The Australia RV Market Report is Segmented by Type (Towable RVs and Motorhomes), Application (Private and Commercial), Sales Channel (OEM New, Rental Fleets, and Aftermarket Conversions), Propulsion (Diesel, Petrol, and Electric/Hybrid), and Region (New South Wales, Victoria, Queensland, Western Australia, and More). The Market Forecasts are Provided in Terms of Value (USD) and Volume (Units).

List of Companies Covered in this Report:

Jayco Inc. Swift Group Australia Winnebago Industries Sunliner Recreational Vehicles Avida RV Thor Industries Inc. Forest River Inc. JB Caravans Road Star Caravans Maverick Campers Trakka Crusader Caravans Lotus Caravans Zone RV REDARC Electronics Bruder Expedition Vehicles Kokoda Caravans On The Move Caravans Track Trailer Paramount Caravans

Additional Benefits:

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

Table of Contents:

- 1 Introduction
 - 1.1 Study Assumptions and Market Definition
 - 1.2 Scope of the Study
- 2 Research Methodology
- 3 Executive Summary
- 4 Market Landscape
 - 4.1 Market Drivers
 - 4.1.1 Federal Rebates for Locally-Made Caravans
 - 4.1.2 Domestic Road-Trip Tourism Resurgence
 - 4.1.3 Ageing "Grey-Nomad" Demographic Growth
 - 4.1.4 Expansion of Caravan-Park Infrastructure and Luxury Holiday Parks
 - 4.1.5 Off-Grid Solar and Battery Integrations
 - 4.1.6 Remote-Work Adoption Enabling Long-Stay Travel
 - 4.2 Market Restraints
 - 4.2.1 Supply-Chain Volatility for Chassis and Components
 - 4.2.2 Rising Interest Rates on RV Financing
 - 4.2.3 Limited EV Charging Infrastructure for E-Motorhomes
 - 4.2.4 Escalating Campsite Overcrowding and Booking Limits
 - 4.3 Value / Supply-Chain Analysis
 - 4.4 Regulatory Landscape
 - 4.5 Technological Outlook
 - 4.6 Porter's Five Forces Analysis
 - 4.6.1 Threat of New Entrants
 - 4.6.2 Bargaining Power of Buyers
 - 4.6.3 Bargaining Power of Suppliers
 - 4.6.4 Threat of Substitutes

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

4.6.5 Intensity of Competitive Rivalry

5 Market Size and Growth Forecasts

5.1 By Type

5.1.1 Towable RVs

5.1.1.1 Travel Trailers

5.1.1.2 Fifth-wheel Trailers

5.1.1.3 Folding Camp Trailers

5.1.1.4 Truck Campers

5.1.2 Motorhomes

5.1.2.1 Type A

5.1.2.2 Type B

5.1.2.3 Type C

5.2 By Application

5.2.1 Private

5.2.2 Commercial

5.3 By Sales Channel

5.3.1 OEM (New)

5.3.2 Rental Fleets

5.3.3 Aftermarket Conversions

5.4 By Propulsion

5.4.1 Diesel

5.4.2 Petrol

5.4.3 Electric / Hybrid

5.5 By Region

5.5.1 New South Wales

5.5.2 Victoria

5.5.3 Queensland

5.5.4 Western Australia

5.5.5 South Australia

5.5.6 Tasmania

5.5.7 Northern Territory

5.5.8 Australian Capital Territory

6 Competitive Landscape

6.1 Strategic Moves

6.2 Market Share Analysis

6.3 Company Profiles (includes Global level Overview, Market level overview, Core Segments, Financials as available, Strategic Information, Market Rank/Share for key companies, Products and Services, and Recent Developments)

6.3.1 Jayco Inc.

6.3.2 Swift Group Australia

6.3.3 Winnebago Industries

6.3.4 Sunliner Recreational Vehicles

6.3.5 Avida RV

6.3.6 Thor Industries Inc.

6.3.7 Forest River Inc.

6.3.8 JB Caravans

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 6.3.9 Road Star Caravans
- 6.3.10 Maverick Campers
- 6.3.11 Trakka
- 6.3.12 Crusader Caravans
- 6.3.13 Lotus Caravans
- 6.3.14 Zone RV
- 6.3.15 REDARC Electronics
- 6.3.16 Bruder Expedition Vehicles
- 6.3.17 Kokoda Caravans
- 6.3.18 On The Move Caravans
- 6.3.19 Track Trailer
- 6.3.20 Paramount Caravans

7 Market Opportunities and Future Outlook

7.1 White-space and Unmet-Need Assessment

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

**Australia Recreational Vehicle - Market Share Analysis, Industry Trends & Statistics,
Growth Forecasts (2026 - 2031)**

Market Report | 2026-02-09 | 180 pages | Mordor Intelligence

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User License	\$4750.00
	Team License (1-7 Users)	\$5250.00
	Site License	\$6500.00
	Corporate License	\$8750.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-02-28"/>
		Signature	

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

