



4 December 2025

### **Truck sales remain steady as the year draws near to a conclusion**

With just the month of December remaining and in what has been a slower year for new Australian heavy vehicle sales (trucks and vans with a GVM above 3,500kg), the market remains steady as 2025 draws to a close. Total heavy vehicle sales for the month of November finished at 3,810 new deliveries. This was down 11.9 percent (-512 vehicles), over November last year, a percentage reduction very much in line with sales for the year. Following year-on-year record sales in 2022, 2023 and 2024, the new heavy truck and van market has cooled somewhat in 2025, tracking down 12.0 percent to the end of November. However, despite slower than recent sales this year, the market is set for its third best year on record. All in all, a solid result, given the generally weaker Australian economy in 2025.

The Heavy Duty truck segment continues to experience the greatest year-on-year slowdown of all of the four heavy vehicle sectors, having been hit the hardest by slowing sales all year long. November was a better month for the Heavy Duty segment with 1,243 trucks delivered, down 144 trucks over the 1,387 trucks sold in November 2024. That was a 10.4 reduction for the month. Overall the Heavy segment trails last year's results by a greater amount, 18.4 percent. In vehicle numbers that is 2,739 less Heavies sold, than to the end of November in 2024.

The Medium Duty truck segment has been the second hardest hit sector in 2025 and this trend continued at pace in November. Only 464 Medium trucks were delivered for the month, a significant decline of 34.0 percent (-239 trucks) over November 2024 sales. Year-to-date the Medium Duty truck sector is performing better, with sales lagging behind those of the same period last year by 16.2 percent (-1,199 trucks). This is primarily due to poor sales in quarters three and four this year.

The Light Duty truck segment was the only sector in positive territory in November, with sales up slightly when compared with November 2024 and remains the least effected by the sales downturn of all the heavy vehicle segments in 2025. 1,263 Light Duty trucks were sold for the month, 8 more little trucks than for the same month last year. That was a 0.6 percent improvement over the 2024 November result. Year-to-date the Light truck segment is down 6.5 percent at the end of November. In terms of sales numbers, that was 13,395 LD truck sales in 2024 to the end of November, compared with 12,529 Light Duty Truck sales thus far in 2025, a deficit of 866 trucks.

Sales in the Light Duty van segment continue to struggle in 2025 and the month of November saw another poor result, when compared to sales in November 2024. 840 vans were sold in November 2025, that was a significant decrease of 137 vans (-14.0 percent) over the 977 sold in November 2024. Year-to-date the Light Duty van segment is fairing a little better, trailing 2024

sales by 8.0 percent. In terms of sales that is 839 less vans. A total of 9,670 vans have been delivered thus far in 2025, compared with 10,509 van sales to the end of November 2024.

Tony McMullan, CEO of Truck Industry Council, the peak industry body for truck manufacturers and importers in Australia, noted that while new truck sales have not been as strong this year, compared to 2023 and 2024, sales have remained resilient throughout 2025.

“2025 has thus far seen a reduction in new truck sales when compared to the two preceding, record breaking, years. There have been multiple factors that have worked against sales in 2025, the most influential is no doubt the general economic conditions across most business sectors in Australia, that have remained weak throughout the year. Another contributing factor is the Australian Design Rule (ADR) change from ADR80/03 (Euro V) to ADR80/04 (Euro VI), that happened in quarter four this year. A number of truck manufacturers have struggled with supply chain issues in recent months as a result of this ADR change. This has affected the supply of some truck models.

However, despite these challenges, the market remains on track for around 45,000 new truck and van sales in 2025. Sales over 44,379 would result in 2025 being the third best ever sales result recorded for the heavy vehicle market in Australia.” Mr. McMullan concluded.

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*Truck Industry Council is the peak body representing all suppliers of on-road heavy vehicles in Australia. TIC members represent 16 truck brands currently on sale in Australia, plus four truck engine and major component brands.*

*\*T-Mark is a database that compiles all trucks (that is, non-passenger carrying vehicles with Gross Vehicle Mass above 3,500 kg) sold into the Australian market that comply with Australian Design Rules. All road registered vehicles are captured, plus most of the off-road vehicles. Monthly data reports are made available to TIC members and the media.*

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