



## T-MARK

Truck Market Data

### Truck Market Comment: Fourth Quarter & Full Year, 2025

6<sup>th</sup> January, 2026

#### **Third best sales result for Australian heavy vehicles**

*Australian truck market comment pieces are issued quarterly by the Truck Industry Council (TIC)<sup>1</sup>, owner and compiler of the official T-Mark<sup>2</sup> truck market sales database.*

Throughout 2025, the Australian economy faced significant challenges, leading to the closure of several transport companies, including a number of high-profile operators. These closures resulted in a substantial influx of used trucks into the market, many of which were late-model, high-quality vehicles offered at highly competitive prices. This increase in used vehicle availability inevitably displaced a portion of new truck sales during the year. Despite these headwinds, new heavy vehicle sales in Australia still achieved the third-highest result on record.

New truck and heavy van sales for the 2025 calendar year totalled 45,191 units, as detailed in the Truck Industry Council (TIC) T-Mark data released on Monday 5<sup>th</sup> January 2026. This was down by 6,086 units, or 11.9 percent, over the all-time record 2024 sales result. TIC believes that this is a good result for the sector given the economic headwinds, cost of living pressures, etc, that saw many sectors in the Australia economy recede at greater rates in 2025. For context, back in 2022 a total of 44,379 trucks and heavy vans were sold, beating the then previous all-time sales year of 2018. Then in 2023 a new mark was set when 47,757 heavy vehicles were delivered in the twelve month calendar year. This was in turn beaten again in 2024 when a new all-time record of 51,277 was set.

Taking a closer look at the results for the fourth quarter 2025, T-Mark data shows sales of 11,464 vehicles. This was the fourth best fourth quarter result, showing that sales did ease somewhat in the second half of last year.

The **Heavy Duty Truck Segment**<sup>3</sup> managed to amass sales of 1,265 units for the month of December 2025, down by 116 trucks, or -8.4 percent, over the December 2024 result. In the fourth quarter of 2025, Heavy Duty truck sales reached a total of 3,734, down 561 trucks, or -13.1 percent, over October to December 2024. Overall, 2025 saw a softening of Heavy Duty truck sales and the end of year total of 14,297 fell short of the 2024 Heavy sales total by 2,855 trucks, -16.7 percent down. Heavy Duty trucks sales also fell behind those of the Light Duty

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truck segment for the first time in ten years. Highlighting that the heavy end of the market lost sales at a greater rate than the light end in 2025. The Heavy truck segment accounted for 32.6 percent of all heavy vehicles sold in 2025. Narrowly beaten by the Light Duty truck segment which took first place with a share of 33.1 percent last year.

The **Medium Duty Truck Segment**<sup>4</sup> saw a similar easing of sales, when compared to 2024, that was particularly evident in December Medium truck sales. The December 2025 total was just 445 units, representing 261 less Medium Duty sales over the same month in 2024, that was a significant decrease of 37.0 percent for the month. The fourth quarter MD segment result of 1,396 was also well down on the final quarter 2024 result of 2,107 units, by 711 trucks, or -33.7 percent. This is well behind the final quarter record for Medium trucks, set way back in 2007 when 2,812 MD trucks were delivered in the final three months and highlights the freight industry's move away from Medium trucks into either smaller Light Duty trucks, or to larger Heavy trucks. The total tally of 6,672 Medium truck sales in 2025 fell well short of the 2024 Medium truck sales result by 18.0 percent, or 1,460 less MD trucks. The 2025 result is well below (-32.8 percent) the segment peak of 2007, when 9,923 Medium Duty trucks were delivered. Again highlighting, that these trucks are less favoured by transport operators. In 2025 Medium Duty truck sales accounted for just 12.2 percent of all new heavy vehicles sold in Australia, less than half of the MD segment's peak of 30.9 percent set in 2001.

The **Light Duty Truck Segment**<sup>5</sup> performed better than other segments in 2025, however was still down when compared with the sales recorded in 2024. The yearlong trend in the Light Duty truck segment was softer sales as mentioned above, with a total of 13,712 Light Duty trucks delivered last year, a fall of 5.8 percent, 846 fewer, Light truck sales than in 2024. Looking solely at the month of December 2025, sales were up 1.7 percent over December 2024 "little" truck sales with 1,183 new Light Duty trucks delivered, 20 more trucks than December 2024. The fourth quarter 2025 total of 3,799 LD truck sales was also slightly up on the quarter four 2024 result by 1.0 percent (68 more trucks), highlighting the strong Light Duty truck sales in the back half of last year. As detailed above, the Light Duty truck segment accounted for at 33.1 percent of all heavy vehicle sales in 2025.

The **Light Duty Van Segment**<sup>6</sup> as per all other segments the Van segment fell year-on-year when compared with 2024 sales. By year end 2025 a total of 10,510 Vans above 3.5t GVM were sold in Australia, down 8.1 percent (-925 vans) over the previous year's result. December 2025 saw van sales continued the year long 2025 trend, with 840 vans delivered, down on December 2024 sales by 9.3 percent (-86 vans). The 2025 fourth quarter result of 2,535 new van sales was also down on the 2024 fourth quarter result of 2,890, by 355 vans (-12.3 percent). These 2025 van sales saw the Van segment make up 22.1 percent of the total Australian new heavy vehicle market.

The Chief Executive Officer of Truck Industry Council (TIC), the peak industry body for truck manufacturers and importers into Australia, Tony McMullan, said: "Despite the challenging economic environment that prevailed across the Australian economy in 2025, it was pleasing to see new truck sales hold up well in 2025. Culminating in the third best sales result for the heavy vehicle sector last year. The result marks the fourth year in succession of record, or near record, sales, 2022 - 44,379 sales, 2023 - 47,757 sales, 2024 - 51,277 and 2025 - 45,191. It was equally

pleasing to see sales well into the forty thousands. The 40,000 barrier was only broken relatively recently in 2018. This was tempered somewhat due to COVID and the ensuing global supply chain disruptions. However, sales are now consistently continuing above this mark.”

“Despite significant new truck sales, the Truck industry Council (TIC) and our members, remain concerned that the average age of the Australian truck fleet remains much older than that of Europe, North America and Asian countries such as Japan and Korea. An old truck fleet is not conducive to improved safety, public health and environmental outcomes for our society. Governments across Australia must consider what more can be done to reduce the age of our nation’s truck fleet.” Mr McMullan concluded.

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<sup>1</sup> *Truck Industry Council is the peak body representing all suppliers of on-road heavy vehicles in Australia. TIC members represent 18 truck brands currently on sale in Australia, plus four truck engine and major component brands.*

<sup>2</sup> *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.*

<sup>3</sup> **Heavy Duty Truck Segment** is defined as cab-chassis type vehicles (both rigid and prime mover application) with  
a) Three or more axles; or  
b) Two axles, a Gross Vehicle Mass greater than 8,000 kg, AND a Gross Combined Mass of more than 39,000 kg.

<sup>4</sup> **Medium Duty Truck Segment** is defined as cab-chassis type vehicles with Gross Vehicle Mass of greater than 8,000 kg, but with a Gross Combined Mass up to and including 39,000 kg.

<sup>5</sup> **Light Duty Truck Segment** is defined as cab-chassis type vehicles with Gross Vehicle Mass of 3,501 kg to 8,000 kg inclusive.

<sup>6</sup> **Light Duty Van Segment** is defined as enclosed van (non passenger carrying) vehicles with Gross Vehicle Mass of 3,501 kg to 8,000 kg inclusive.

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