

B-Doubling Down On Electric Trucks

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Bridget McKenzie, the National Party's leader in the Senate, was contemptuous.

During an urgency motion on March 30 about the government's response to the global fuel crisis, she fired up over suggestions that Australia should look at electrifying the country's heavy vehicle fleet.

"To hear the ridiculous contributions from the Labor Party senators, who somehow think you can hook up a B-double full of cattle, coming down from Rockhampton to Brisbane, and actually use an electric truck? Seriously?" McKenzie, who is also the Coalition's spokesperson for transport, continued: "I'm all for electric where it makes sense; that's usually in suburbs and capital cities, where you can plug it in at night."

It is, however, indeed possible to move cattle, or steel, toilet paper and many other things, on a giant semi with an electric prime mover at the front, and to do it more cheaply and quickly than with diesel. It's already happening in much of the rest of the world – and now, somewhat belatedly, in this country.

The EV revolution is moving on from light to heavy vehicles, and doing so at an astonishing pace.

The 2025 Global EV Outlook report from the International Energy Agency recorded an 80% increase in electric truck sales globally in 2024. There's been an almost six-fold increase in the number of available models, to more than 400, since 2020.

More recent data, published by *CV World*, a Chinese website specialising in the commercial vehicle market, is even more startling. Total registrations of what it called "new energy vehicles" – mostly electric, with a much smaller number of hydrogen trucks – was up 182% on year in China in 2025. More than 45,000 heavy-duty electric trucks were registered – 54% of total registrations – in just the month of December.

Advances in batteries and charging infrastructure are catalysts. New heavy-duty electric trucks can travel 400-500 km on a single charge, making them suitable for many regional freight routes and long-distance corridors.

A new generation of megawatt charging infrastructure makes it possible for an electric semi to charge from 20% to 80% in less than 30 minutes.

Had McKenzie even paid attention to what was happening outside the Parliament House door that Monday, she might have avoided embarrassment.

The Smart Energy Council had arranged, on the lawns at the front of the house, a display of several heavy electric trucks. They were there at 7am, ahead of a gathering of some 300 industry, government, energy and infrastructure representatives in Parliament's Great Hall for the Freight Forward 2026 summit on commercial vehicle decarbonisation.

McKenzie says she was not invited; the organisers say the event on the front lawn was open to anyone to attend. Had she fronted up, she might have learnt a lot.

One of those trucks displayed on the parliament lawns was a Chinese-made, B-double rated, **Windrose** prime mover. Over about the past six months, Windrose and Australian company **New Energy Transport** have engaged in a series of trials and demonstrations of the capabilities of electrics.

Last October the truck completed a 480-km round trip from Picton, south of Sydney, to Beresfield in the Hunter region on a single charge, with a load of feed provided by Australia's largest poultry transport, logistics and engineering services provider, Multiquip. The person charged by Multiquip with ensuring the truck met all relevant laws and regulations – which it did – was the company's national compliance manager, David Muir.

Muir came to the trial, he says, with no prior experience of the type of truck, nor preconceptions about the relative merits of electric versus diesel. He went away impressed, particularly with its power. The Windrose produces 1400 horsepower – compared with 500 to 700 from a typical diesel – which enables it to maintain speed, even up steep gradients.

Muir says he won't repeat exactly what other truck drivers said over the two-way "when it was flying past them, up Mount White". The gist of it was, they were impressed.

"Electric trucking is the opposite. It's high capex, low opex. The trucks are more expensive up front, and you have to pay for charging infrastructure, but the benefits on the other side, on the opex side, are so huge that the overall cost, we believe, is now lower than diesel."

Because the Windrose was able to sit at the speed limit the whole way, the trip was also 40 minutes faster than it would have been under diesel power.

Moreover, the fuel cost was a fraction of the diesel alternative, says Daniel Bleakley, co-founder and co-chief executive of New Energy Transport.

“We used 600 kilowatt hours. At 15 cents wholesale renewable energy price, that would have cost about \$50 up and back for a 36-tonne combination. “That trip normally costs around \$300 in diesel, at prewar prices,” he says.

Bleakley says a recent delivery from Sydney to Canberra with a load of toilet paper from Who Gives a Crap cost about 84% less than the equivalent diesel run, based on current prices. “Even on pre-Iran war, pre-oil crisis prices, we estimate that that run would have still been 70% cheaper on energy cost alone.”

In another trial, covering one of the steepest major trucking routes in the country, says Bleakley, “this particular truck, the Windrose, hauled 68 tonnes of steel from BlueScope Steelworks in Port Kembla, up Mount Ousley, passing diesel trucks like they weren’t even moving. “It was able to hold the speed limit all the way into Sydney and back again. And it could do two of those loops on one charge.”

In contradiction of those who claim electric trucks are unsuited to long-haul operation – including Chris Uhlmann, who asserted in *The Australian* just last week that the technology to replace diesel on major freight routes “does not exist” – Bleakley says the economics of electric trucks actually get better with heavier loads and longer distances. “The more energy that a trucking operation is consuming, the bigger the energy cost as a proportion of the total cost stack ... the bigger the advantage [over diesel],” he says.

It’s a matter of capital costs versus operating costs, Bleakley says. “The existing diesel road freight industry is very low capex, high opex. So you might buy a new truck for \$250,000. You then run it up and down the Hume Highway doing 200,000 km a year, and you’ll spend about \$2 million on diesel over 10 years.

“Electric trucking is the opposite. It’s high capex, low opex. The trucks are more expensive up front [the Windrose costs \$450,000], and you have to pay for charging infrastructure, but the benefits on the other side, on the opex side, are so huge that the overall cost, we believe, is now lower than diesel.”

It was on the basis of that calculation, made before the Iran war sent diesel fuel costs skyrocketing, that New Energy Transport was set up, as Australia’s “first zero emissions, fully electric trucking company”.

It is still tiny compared with what is happening overseas.

It will occupy a site between Sydney and Wollongong, near the intersection of Picton Road and the Hume Highway, chosen on the basis of the large volume of truck traffic. “There’s around 5000 heavy trucks on Picton Road every day going down and back to the Illawarra,” says Bleakley. “And there’s around 4000 trucks on the Hume Highway every day.

“We expect to start construction in Q4 this year, and we expect to be operational at the end of 2027,” he says. “The first stage will be able to support 50 electric, heavy prime movers in continuous operation. And stage two will support 150 to 200 trucks. “In parallel, we are now working towards getting 20 of these trucks up and running in the next few months. We have a rapid deployment plan emerging right now in response to the diesel crisis.”

The depot will generate 10 to 20% of its power from its own solar panels, and buy the rest from other renewable sources. It will also have a 10-MW battery, enabling the company to draw electricity when it is cheapest in the middle of the day, and store it for later.

Small beginnings, but, says Bleakley, the future possibilities are enormous.

Australia is more dependent on diesel-fuelled road transport than any other country, except the US. Even as emissions from other sectors of the economy, notably electricity generation, have declined, transport emissions have remained high. Road freight is a large part of the problem.

“Articulated trucks make up around 3% of all commercial vehicles in Australia, but they account for around 80% of the tonne-kilometres in freight movement,” says Bleakley. “So they are doing an enormous amount of work and burning an enormous amount of diesel.”

As a consequence of the Middle East war, diesel is in short supply, very expensive, and likely to remain so for months, maybe years, to come.

In recognition of this, the federal government on Thursday announced support for the New Energy Transport project under its new Investor Front Door program. A joint statement from the treasurer and industry and transport ministers said the government “will provide project developers with a dedicated engagement manager to help navigate the regulatory requirements, obtain regulatory decisions and identify existing appropriate government financing options.”

It was thin on details, but in essence, it will grease the regulatory wheels at all levels of government. Bridget McKenzie was right about one thing: there are issues to do with the weight of electrics and the strain they put on existing infrastructure.

Still, it showed the Labor government is cognisant of the need to find alternatives to Australia’s diesel-dependent heavy transport sector. Which is more than can be said for the Coalition parties, whose proposed solution to the global fuel crisis was summarised by Opposition Leader Angus Taylor in his address to the nation last week: “We must dig, and we must drill.” National Party leader Matt Canavan advocated making oil from coal.

As experts such as Climate Energy Finance director Tim Buckley, along with independent MP Monique Ryan, pointed out in response, such technology has previously only been employed by Nazi Germany and South Africa, in desperate response to sanctions. It is inordinately expensive to do and is very emissions intensive.

But what of the suggestion of mining and refining more oil?

The first problem, says Greg Bourne, of the **Climate Council**, is that Australia does not have much in the way of proven oil reserves. He notes that when Canavan was the resources

minister in the previous Coalition government, he issued exploration permits in the Great Australian Bight. Several oil majors took them up, then handed them back, because they were not viable. “Long story short,” says Bourne, “there’s oil in the ground, but by and large, it is commercially not viable.”

Even if it were, it would take a long time to bring into production and would not insulate Australia from oil shocks such as we are currently experiencing. The war is causing fuel price spikes in countries with big oil reserves as well.

The US is the world’s largest producer of oil and one of the three biggest exporters, along with Saudi Arabia and Russia. It also has enormous refining capacity. Yet in the month after the start of the war with Iran, US petrol prices went up 31% and diesel prices rose 41%.

That, says Bourne, is because oil is a globally traded commodity. “It’s like gold. The gold price is set by supply and demand, and it is the same price everywhere in the world on that particular day. Same with silver, same with platinum and other global commodities. Same with oil.”

Not only does Australia not have much in the way of proven oil reserves, he says, it also lacks refining capacity. Increasing that capacity is financially unfeasible.

He cites the example of Western Australia’s Kwinana refinery, which was Australia’s biggest before its closure in 2021. Kwinana’s maximum throughput in its life was 140,000 barrels a day, he says, and when it was built, in the mid 1950s, “places like Singapore and Indonesia didn’t have big refineries. “Now Singapore and Indonesia have refineries 10 times bigger than Kwinana was. The economies of scale meant you could not ship a tanker-load of crude to Kwinana, refine and distribute it in Australia at a price to compete.”

The same story goes for all six of Australia’s eight refineries that have closed this century. The two that continue to operate, Bourne says, only do so because they are heavily subsidised by the federal government – as would inevitably be the case if new refining capacity were built.

Apart from the cost, it would take at least five years, optimistically, to get new refining capacity up and running.

Bourne gives me a potted history of the oil age, from the 1860s, through to the rise of the Organization of Petroleum Exporting Countries – founded in 1960 in Baghdad, with five initial members: Iran, Iraq, Kuwait, Saudi Arabia and Venezuela. OPEC now has grown to include 12 core members, which sit on about 80% of the world’s proven oil reserves. Bourne rattles off the various oil shocks from the 1970s to date, to underline the point that OPEC, and in particular the petrostates of the Middle East, have enormous geopolitical power, and a history of wielding that power ruthlessly. Whatever the final outcome of this most recent period of instability, he says, it is a “certainty that going forward there will be another oil shock and another oil shock and another oil shock” for as long as the world remains dependent on oil. “And so basically, the smart money is going to go into EV, batteries, smarter grids.”

Recent events have shown that one side of politics in Australia is at least somewhat cognisant of that reality. The other is not.

In Angus Taylor, says Bourne, we have an opposition leader who simply parrots a variation of the Trump mantra: “Drill, baby, drill.”

Instead, Bourne argues, Australia should look at what is happening in China where “the electric car fleet is massive, and their electric truck fleet is massive, and their bus fleet is massive”. “I’ve said it before, and I’ll say it again. Angus, embrace the future. Stop hugging the past.”

<https://www.thesaturdaypaper.com.au/news/economy/2026/04/11/b-doubling-down-electric-trucks>