



Behind the Wheels Podcast Transcription

Season 2 Bonus Episode 5: What's Trucking Like in the Land of Down Under

ANNOUNCER

You're listening to Behind the Wheels with Doug Mason, Dave Walters, and Mike Yagley. This is a show where we talk about heavy truck and medium duty axle ends. Doug, Dave, and Mike bring close to 100 years of experience and expertise in the transportation business.

Join us once a month to learn new things about axle ends. Sponsored by Alcoa® Wheels, the global leader in aluminum wheel innovation.

MIKE YAGLEY

Welcome to another episode of Behind The Wheels, I'm Mike Yagley.

DOUG MASON

I'm Doug Mason.

DAVE WALTERS

And I'm Dave Walters.

MIKE YAGLEY

Really happy to bring Ross Simmons. He's the managing director for Alcoa Wheels, Australia. Ross, welcome to the show.

ROSS SIMMONS

Hi, thanks for having us guys. I really appreciate it. It's fun to be with you.

MIKE YAGLEY

Before we started recording, we were having an awful lot of fun. Hopefully the conversation will just keep rolling along. We all know you Ross, we've worked together for a long, long time, but why don't you introduce yourself to our audience?

ROSS SIMMONS

Well, I've been associated with our Alcoa Wheels in Australia since the inception, since 1995. So under different distribution. First distributor here in Australia was a company called McKay who was basically a farm implement company, but also dabbled in steel truck wheels and tractor wheels. So we imported the first Alcoa in 1985. I think back then we sold 500 wheels and bit of dust gathered on the others, given the market wasn't really ready for that topic product. And then under distribution, we changed about seven years later to a privately owned business called Wheel Master, and Wheel Master ran in Australia up until 2000 when Alcoa at the time purchased that business. And we have been part of the Alcoa Iconic Helmut group since 2000. We're fairly unique in what we do, obviously Alcoa being our main line of product, but we're a bit unique in our business because we also do inherited products like tires, like steel wheels, products that just add to our business.



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ROSS SIMMONS

We do our own ASLs here. Our ASLs are obviously tire assembly operations for the main manufacturers. And we still have, in Australia, we have no more car manufacturers left. So GMH and Ford and Toyota have all left our shores in the last, probably within the last five to 10 years, but we still have four manufacturers of trucks, which we're obviously pretty keen to keep. So Paccar Kenworth who also do volume of DAF, European style trucks. We have Volvo and interesting note is that the Volvo plant here in Brisbane, where I'm located, was the first Volvo Mack integrated factory anywhere in the world. When Volvo bought Renault back in, I think the early 2000s, they inherited Mack as a consequence. Mack were operating here in Brisbane as well as Volvo, but obviously at that time independently. And they became the one integrated factory. So we do all the tire assembly for them here in Brisbane. And we do the same for Kenworth and the other one being Iveco, which was actually an old International harvester business.

ROSS SIMMONS

Iveco bought that some 20 years ago now. So they're the four left and we're pretty keen to keep them here to be honest. We need them, we need that type to give out market some stability, some uniqueness, which we do. And we'll get into a bit of that, I hope. But yeah, that's a bit of my background.

MIKE YAGLEY

We all love our OEMs, but given that there's only four left there, I guess your love for the OEMs is even greater than ours. So it's interesting, you get into a smaller market like Australia and it has its own, like you just said, there used to be automotive manufacturing there, and now it's just heavy truck. That has its own spin on. It changes the dynamic. That changes the market dynamic, I would think, significantly that most of the products there's so much that's being shipped in. And then you also have unique requirements in Australia, like any market. I know, Ross, you and I worked in China together. We worked all sorts of different places together. And every market, it's very similar, they're all buying trucks, they're all buying tires, but whatever is the manufacturing driver for that market changes the market. Before we got on, Doug just got back from Hawaii, and Hawaii has a huge transit bus market. Give us a little overview of the Australian market. What's unique about it. What's going on with that?

ROSS SIMMONS

Well, I think industry has changed here. There used to be an old saying that Australia rides on the sheep's back.

MIKE YAGLEY

What was that?

ROSS SIMMONS

We used to ride on the sheep's back. So on the back of a sheep.

MIKE YAGLEY

That's a saying?

ROSS SIMMONS

That was a saying.

MIKE YAGLEY

Okay.

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ROSS SIMMONS

So when I was growing up, certainly that was it because we were all about livestock and wool associated products, beef, all sorts of cattle. Well, that's changed. In the last 20 to 25 years, we're really good at digging holes. So we've found that we do have... Well, Australia is a very big country and a lot of people don't know, it's probably in similar size to North America, but our population is about 10% of what you have. And so 25 million people, but there's a hell of a lot of nothing here. So a lot of desert, a lot of hot conditions, for most part uninhabitable, you can't grow anything. So we do have a lot of resource. So we have things like coal and iron ore and gold, bauxite, which is made to produce aluminum. So we have high deposits of that. And many other things like lithium is the big buzz one. So we're really good at digging holes and we've got really good it. So we no longer ride on the sheep's back, we actually ride on the back of a dump truck now.

MIKE YAGLEY

That's a good thing for us. That's a good thing for us.

Ross Simmons

It is. And that's probably what the most unique part of our industry, the trucking industry is unique because of those high loads, heavy loads. In our pre discussion, Doug mentioned road trains. Well, road trains is fairly unique to Australians. We have multiple trailers that have basically one truck or rig, could be pulling up to four or five trailers. Mostly side tippers, which is to move whatever, whether the ore or the gold or whatever deposit you're working on. So those are really heavy loads. So they're fairly unique in the equipment where you're looking at 600 horsepower trucks, some tri-drive twin-steer applications. So a lot of these units can have over a hundred wheels positions.

MIKE YAGLEY

That's great.

ROSS SIMMONS

Fantastic when you're the managing director and you've got to hit a bottom line. More of those, thank you. So that's a really big part of our industry and we do really, really well. Our products stand up to that environment. It's very heavy. I know that you've got similar applications in North America, particularly around coal, which have very heavy-duty applications. Well, we're the same. But it needs to be lightweight. So what changed our industry is probably in the mid 80s to say 1990 was that, we'd always had regulations against overloading, but there wasn't any enforcement of that. So enforcement came down really, really hard because they understood that and the pavement damage. That's not unique to Australia, but it was the same issue. So you're paying all this taxpayer money to build roads, and then you had to repair them so often because of the damage that the trucks and trailers were doing to those roads. So the government said, "Okay, let's stop overloading." And it changed everything.

ROSS SIMMONS

Then products, light-weighting products were absolutely critical. So no different once again, but not unique to us, but I think how quickly it happened and maybe Dave, who has been around like me a long time, they could understand in the US how quick that was. We were dominated by, what we call spider rims or demountable rims. They got many terms. We were dominated by that, everybody had them. So we had some challenges in getting ourselves going on, how do we get 10 stud into the mix? It wasn't alot, it wasn't just taking a steel wheel off and putting a aluminum on because you had to change your hubs and all sorts of things when you're moving from spider slash demountable. So they were massive challenge for us.

MIKE YAGLEY

So, Dave, you saw pretty much the same thing happen in Pennsylvania and pretty much around the country here in the US when load requirements, load limiting requirements started coming in. What era was that when you saw that?

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DAVE WALTERS

How can I say, in this country, when deregulation hit in the early 80s and they deregulated trucking before it was regulated by, everybody had rights and they could bid on stuff. And it was a different whole world. They deregulated trucking in the early 80s. And once they did that, it really opened up to where anybody could get in the business. It created a lot of competition because before, if I was a big carrier, I could say, "I got rights to that corridor." So it was almost, the government had controls, so when they deregulated, everything went nuts for a while because anybody could buy a truck and go in and haul anything they wanted. There was no more rights like, "Hey, I have that right to haul this because I bought that years ago, I got PUC numbers." It was so different. So it happened very quickly the change because anybody could get it in the business.

DAVE WALTERS

So when that happened, the government had to step in because it used to be mega carriers controlled the markets. And when they got in with the owner operators and the smaller guys, that's when they started putting weight limits and enforcement of weight limits and really created our market tremendously. So it was almost simultaneously in the early 80s, when they deregulated, they needed to put in stop gap measures to let some type of weight limits and everything control measures so these people that only had one or two trucks, they're like, "What the heck? I could care less." Well, if you had 6,000, you overloaded and did something bad, you're going to pay a whole bunch of money. And it just changed the whole market.

MIKE YAGLEY

About the same timing though, mid 80s roughly is when the...

DAVE WALTERS

Early 80s, mid 80s.

MIKE YAGLEY

Yeah. So Ross trucking and having to do with any sort of mining, digging holes like you said, is the key to that market. That's the biggest part of the market right now. What are the market challenges that you're seeing?

ROSS SIMMONS

Well, the market challenges are being probably there, because we are dealing with long distances, really long distances, very, very hot conditions. So those combined, our roads are, I'll call them average. Certainly in populated areas it's freeways but as you get out of those cities, our roads can be, they're not curbed, they're just basically dirt skirting. So they're really challenging and really hard on equipment. The government's tried everything they can to maintain roads, but it's just such a big country and such long distances that it's not always easy to do. And we still have, particularly in the Outback, we still have a number of unmade roads where trucks have two-ply gravel roads. So those challenges on tires and wheels and suspensions and just equipment in general is really tough. So that probably is a unique thing to us. We do have to deal with that.

ROSS SIMMONS

Populated areas, moving freight around is, we used to do it like most countries, I think on single trailer applications as well. Some of our trailer equipment is fairly unique, that I've seen anyway, in North America, Europe, particularly through Asia, it's very unique. The most popular combination is a B double. So that's one small A trailer followed by a standard 40-foot rear trailer. And that combination can be in tipper, it can be in curtain sider, whatever you want. So it's the most popular. So it's helped us take a few trucks off the road, which is particularly in populated areas, is the government's goal. So that's helped a lot just to move freight around. So it was probably introduced in the mid 90s and it just dominates the roads now.

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ROSS SIMMONS

And one of our other industries that's really strong is grain. Wheat, Barley, you name it. We do a lot of that here and export a hell of a lot of that. So our grain trailers are unique, they're all aluminum, have been for probably two and a half decades. And those combinations of a B double allows us to move a hell of a lot of grain. Bottom dumps, most of those are dumped through the bottom of the belly of the trailer and into a silo, which dotted around provincial areas. So I think as far as equipment is concerned, that would be fairly unique to us. Our construction industry is also strong, but it's what we call truck and dock. So it's a single standard truck with a body on it. And then a single, mostly a four-axle trailer. So a truck and dog is what we move in construction areas. So once again, that's all aluminum though.

DAVE WALTERS

Now Ross, could I ask you one question? Because the most unique thing the first time I went to Australia, you guys had them bull bars on trucks. And I was just fascinated by them because we have nothing like that over here. And I remember asking you what that's used for. Now, wait till you hear the explanation.

MIKE YAGLEY

Well, first of all. What is it, it's a bull bar?

ROSS SIMMONS

So it's called a bull bar. So at the front of the truck to protect the radiator, it used to have a steel like cage on the very front of the truck. They're mostly aluminum now, once again for light weighting. Now, it's sole purpose is, we have a lot of... You have deer there. A truck hits a deer and I'm not sure what damage a deer does, but you hit, particularly a Red Kangaroo out the Outback. A Red Kangaroo at a hundred kilometers an hour, you hit one of them, and you're picking pieces up off your truck for miles down the road, as well as the carcass of the poor old Red Kangaroo, of course.

MIKE YAGLEY

Holy cow.

ROSS SIMMONS

It's purely for that. It's to protect the truck from livestock because particularly in the Outback, there's no fencing. They just wander freely. And that can be Buffalo. When we were trekking through the desert, when the country was first basically formed 200 odd years ago, they introduced camels. So a truck could run into a camel. There is thousands of camels in the Outback. They're a very resilient animal, the old camel. And they can survive. And they were just basically sent off once they were used to cart whatever they would cart and they were sent off. And then obviously they bred. And so, that's pretty much the bull bars use, to protect the truck from livestock on the road. So Dave, when you were here, they have got a little bit more, they're a bit more flash. They serve a purpose so people are engraving them. They're doing all sorts of things to make them look a bit special. And they've got names of transport on the front of them.

ROSS SIMMONS

Well, it's probably unique now to the Outback, but even on the Eastern seaboard here, there's still kangaroos. Particularly at dusk, they move around, pretty much lays about in the sun all day, but then they start to feed and the truck needs to be protected and that's the way we do it.

MIKE YAGLEY

Reminds me of...

DAVE WALTERS

And they really made the truck look tough. They really did. It was like a movie truck with the big bars in front. And I said, "Man, Americans need that." But that added weight, we were never going to do that. But man, they make the truck look tough.

ROSS SIMMONS

Looked like something for Mad Max, right Dave?

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DAVE WALTERS

Yes, Mad Max exactly. And I thought, "This is pretty cool. These guys got pretty hot rod looking trucks." A little more fancier than most of our stuff over there.

MIKE YAGLEY

So obviously, what I'm hearing is that the market is very weight sensitive. It seems like all the major industries, whether you're talking about grain or mining, it seems like there's a lot of weight sensitive market segments.

ROSS SIMMONS

Oh, absolutely. And it's heavily regulated, Mike, it really is. It's dangerous goods, heavily regulated. We don't allow dangerous goods through most of the suburban tunnels that were built. Don't allow that. So there's all sorts of regulation around transport now, and that's just evolved. The first one was the weight, now it's load and about combinations. Our bureaucrats are probably no different anywhere else in the world. And trying to deal, we've only got seven states and each state has its own regulations when it comes to loading. So that's becomes a challenge for our operators. You get to a border and you got to shed some weight, some ridiculous stuff. So because bureaucrats just don't, they basically just don't understand. For the most part, they got a taxpayer to appease, I understand that. And the industry understands that and we want to work in conjunction with those but it's a massive challenge when they have these regulations and they differ.

ROSS SIMMONS

At the end of the day and the way that the trucking industry looks, we're a country of only 25 million people, let's get this right and have it standard across a country like ours. But you throw a bureaucrat into the mix and that's not always achievable.

MIKE YAGLEY

We need to be careful. We're on very, very delicate ground if a bureaucrat listens to this podcast.

ROSS SIMMONS

Yeah.

DOUG MASON

I did hear of one interesting regulation, Ross, that would exclude a potential large supplier of semi-trucks. I don't know if you'd heard this or not, but the regulation for width of the trucks in Australia is a little narrower than US and Europe, as you know. Well, guess what, Tesla is about 50 millimeters too wide.

ROSS SIMMONS

Oh, wow.

DOUG MASON

So Tesla right now is working with your bureaucrats for the hopes of being able to allow their electric vehicle, maybe you could touch on electric vehicles coming into Australia as well. But that I found quite interesting that just by about, I think 0.5 meters, they are a narrower than the rest of the world anyway.

ROSS SIMMONS

Yeah, wow that could be a challenge for Elon, I would think. Given, I know how that's gone over the past. We had an issue here with our hubcap or the Alcoa hubcap, the push on one that you put on the steer axle and it was over with, and depending on how sensitive the road regulator was, he may pull you up for being over that 2.5 meters because your hubcaps stuck out too far. So Elon's got his challenges, I think.

MIKE YAGLEY

So where do you see the market going? Doug brought up electric vehicles. What do you see electric vehicles and everything else, where do you see the future of the Australian market going?

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ROSS SIMMONS

We haven't been immune to that. There is a lot of interest around electric, particularly in the bus segment and particularly in the route bus segment. So city buses, we call it. So we've had alternative energies for quite a while, compressed natural gas for quite a while here in the bus segment. So they understand it and the impact it has. But electric is really, we've actually, funny enough in late 2020, we had our first local manufacturer of electric bus pop up, although it was an existing bodybuilder, bus bodybuilder company. They are now into the manufacturer here of electric bus. So no doubt, Mike, some of the people that you and I have been engaged with in China, particularly BYD and others will look at our market and start to really concentrate on it as we move through that.

ROSS SIMMONS

So government's now starting to give some concession and some incentive to move towards electric. The infrastructure is obviously a challenge, it's charging stations and making sure they get that right. But I see it growing quickly. We've got emission targets like most countries have and a way to meet them. You've got to look for alternative ways because we're not ready to move away fully from coal generated electricity yet. For the most part, we still rely on that. We don't do any nuclear. We're doing things like wind and solar in a big way, but we're still not there. So governments will look for other ways, and that's a clear way to reduce emissions. So we're not immune to that. We're actually, I see it growing very, very quickly, particularly in that bus segment. Where it goes in the truck, may take a bit longer.

MIKE YAGLEY

We're seeing a couple of things. Here in the US we see a lot of aerodynamics that are coming into the vehicle. Those can weigh six, 700 pounds of aerodynamic accessories put onto a vehicle, so that drives more light weighting, or at least it nudges a handful of customers over to start thinking about light weighting. Are aerodynamics also seeing a lot of movement there in Australia with aerodynamics?

ROSS SIMMONS

Always. For the last 20 to 25 years, we've looked at that. But some have come and gone, but this truck design in particular has very much followed that aerodynamic, that slope. We use a lot of bonneted trucks, I think, as you do. And that's a sloping bonnet, particularly the likes of ACAR and Freightliner are very strong in that, but they're always looking for other ways. We have, once again not unique to us, is over the top of the cab an aerodynamic fiberglass attachment that just throws the wind out. So all of that, they're very strongly looking at all ways to, once again, you've got those high speeds, long distances, you're looking for any advantage on fuel efficiency. We pay a hell of a lot for fuel here. In Aussie dollars, I can give it to you. I probably have to work that out in US, but diesel is about a \$1.60 per liter, can't do the math on the gallon to help you out, but it's expensive.

MIKE YAGLEY

That's a lot.

ROSS SIMMONS

It is a lot.

DOUG MASON

Just roughly multiply it by four, that's crazy.

MIKE YAGLEY

Yeah, that's very expensive. Well, what about disk brake?

ROSS SIMMONS

We have, particularly in trail, a trail is really strong on disk brake, really taken off. The American drive line, the Kenworth, the Western Star, the Freightliner are very much still in the drum brake, but most of the Europeans have moved to disk brake. So Volvo is pretty much a disk brake. Truck, DAF, Scania, those types of manufacturers, because funny enough, while we sell around, in a good year, around 13 to 14,000 heavy duty trucks a year here, so it's not a lot. But we have 20 players in this market.

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DOUG MASON

I was going to ask you what's the breakdown between, I would say, because we're so used to the US fitment versus the European fitment when it comes to wheels, 10 on 335 versus 2 on 75. What is the breakdown in Australia between the two?

ROSS SIMMONS

It's about 60, 40, Doug? But once again, you have Kenworth with building here and they dominate the market. They're about 20% market share to a truck that works really well here. It's been manufactured here since the 70's so it has a great deal. And that red badge, it means a lot to a lot of operators here, but that doesn't mean that the other manufacturers don't have a similar following in various levels. Cab over trucks, particularly in line haul are very popular, which brings in the Volvo style or the Scania style or a DAF style. Anyone of those, Iveco as well. Try not to leave anybody out here. But yeah, the 20 players, it's a lot of players for such a small market, but I think that for other markets, they like that their truck performs in a market like Australia.

ROSS SIMMONS

It gives them some credibility from a heavy-duty application in other markets. If you can work here, you can work in other locations. So there's a bit of that. So they will invest in it, but there's also the higher price they get for a truck here than say, in other parts of the world.

MIKE YAGLEY

And I just want to make sure I'm clear, it's a 60% North American type axle and about 40% European type axle?

ROSS SIMMONS

Correct.

MIKE YAGLEY

And this is all in the heavy truck market.

ROSS SIMMONS

This is all in the heavy truck market, yeah.

MIKE YAGLEY

Okay yeah. Because here in the US, we see that European axle and fitment in the bus market, and then in the heavy truck market, we're seeing North American of course. And so bus market, is that pretty much the European fitment over there?

ROSS SIMMONS

It's all European. Some older vehicles might have some Japanese 10 stud drilling on, but that's about it. But no, if anything, that's 25 plus years, will be 10 on 335 in the bus segment. But we have the American drive line, which has the largest percentage of the truck market, that will also dominate the trailer fitment. So you will match, you won't for instance, put a European fitment on the back of a Kenworth, because it'll mean two different spears and all sorts of things. So no, it's dominated. So of the trailer market, it's probably more like 70, 30. And that's because of our multiple trailers and the majority of that, when you talk about multiple trailers, they're heavy duty trucks so people like Outback runners will have, I would think that for the most part, it's dominated by American drive line, although others may dispute that. But from what I see and from what the intel tells me, it's that type of drive line which means they'll put that on the trailers. So the trailer would more a 10 on 285.

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MIKE YAGLEY

Well, we've talked on this podcast before about the advantages of the North American truck design. And I think it was Dave who was saying, "Get into that cab over design, the European style, you feel every bump. You're riding right on top of the axle." With the North American design, you're sort of slung between the wheels, you're slung between the axles. And there's a lot of opportunity for the suspension to give a nice, smooth ride. I'm sure that, if you're driving in the Outback, if you're driving long distances, I could see where the truckers are going to really want to have a nice, comfortable ride if they're practically the living in that back. So how do our wheels fit into this market? Obviously lightweight is a big part of what an Alcoa wheel brings to the market. We talked a lot about the major industries there. You've got grain, you've got mining. And so light weighting is always a huge part of the equation when somebody is making a wheel purchase. What else do you see coming into that wheel purchase calculus?

ROSS SIMMONS

Well, we were the first number one. So our reputation is like in other market's, really strong. Alcoa is a very strong brand here, particularly strong. And once again, I don't know if this is unique, but when a trucker wants to put some wheels, they'll put some Alcoa's on it.

MIKE YAGLEY

Right.

ROSS SIMMONS

That's the type of term, that's how strong it is here. But we're not immune to what's happening in other parts of the world. And we've got our challenges with Asian importers as most markets do. They're basically, for the most part, a copy of our portfolio in no matter what the fitment is, it just looks like one of our wheels. And so substitutions a bit of a challenge for us, making sure the brand is mentioned right through the ordering process from the get go. So we built the business here on Australia on fleet pull through pretty much back in 1985.

ROSS SIMMONS

No OEM wanted to talk to us really because there was no demand for aluminum wheels. None.

MIKE YAGLEY

Right.

ROSS SIMMONS

So we had to create a demand. And we did that by having potentially the best database of fleets of any business here in Australia. And we continue to do that. Now there's a lot of people sold on that and they use Alcoa for a number of years. But we still make sure we have that connection with those people because it's where we built the business and we continue to thrive. That fleet contact, although they're not a direct customer, don't sell directly to them, that specification or concept selling particularly to a steel wheel user is still prevalent. But it's more about the share now for us, we're a very defensive market here.

ROSS SIMMONS

We have very high penetration. The truck segment, the penetrations right now, sits at about 87% aluminum versus steel. In the trailer segment, it sits at around 55 to 60. So it's a very defensive market.

MIKE YAGLEY

Right.

ROSS SIMMONS

A lot of people want a piece of us, right?

MIKE YAGLEY

Right.

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ROSS SIMMONS

So we do everything we can. And what Alcoa has been able to do through innovation, I look at the innovation that we've made in many products and our latest release Ultra have been 18 kilograms, that really gives us an advantage here. We're a higher price, but we deliver with some significant benefits. So the people that have been involved, and I know Mike and Dave and Doug, you've been involved in all of that. And a big thank you from Australia because honestly, it's what keeps us ahead. It really does, light weighting, whatever we can do to keep light weighting, that's the interest here. But we need durability as well. It is a higher price product. It's not a throw away item. We still get runners using the old spot or a demandable carrying cattle out in the Outback, but that's because of the gravel. If they have a blowout of a tire, they'll throw the whole combination into the bush, not just the tire, they'll just throw the whole into the bush. Well, if you're going to do that on an aluminum wheel, it's a little bit of expensive exercise.

ROSS SIMMONS

Maybe the owner or operator of that fleet's not too happy with you throwing it into the bush. So anything we can do to continue to innovate. And we have a great DNA. And what we do here as far as, particularly around light weighting, is key to where we will continue our growth and to continue to deliver this year that we currently enjoy.

MIKE YAGLEY

Well, this has been a great conversation. Thank you for joining us, Ross. We really enjoyed having you on the show. For our listeners, remember, you can always subscribe to our podcast on Apple podcast, Spotify, Google podcasts. And please, if you like what you hear, share it on social media. To submit if you have any questions or comments, if you want to take a look at the episode transcripts, you can visit our website, alcoawheels.com/podcast. And really want to thank you all for listening. We'll see you next time.

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