EUROPEAN HEAVY-DUTY VEHICLE MARKET DEVELOPMENT QUARTERLY (JANUARY–DECEMBER 2025)

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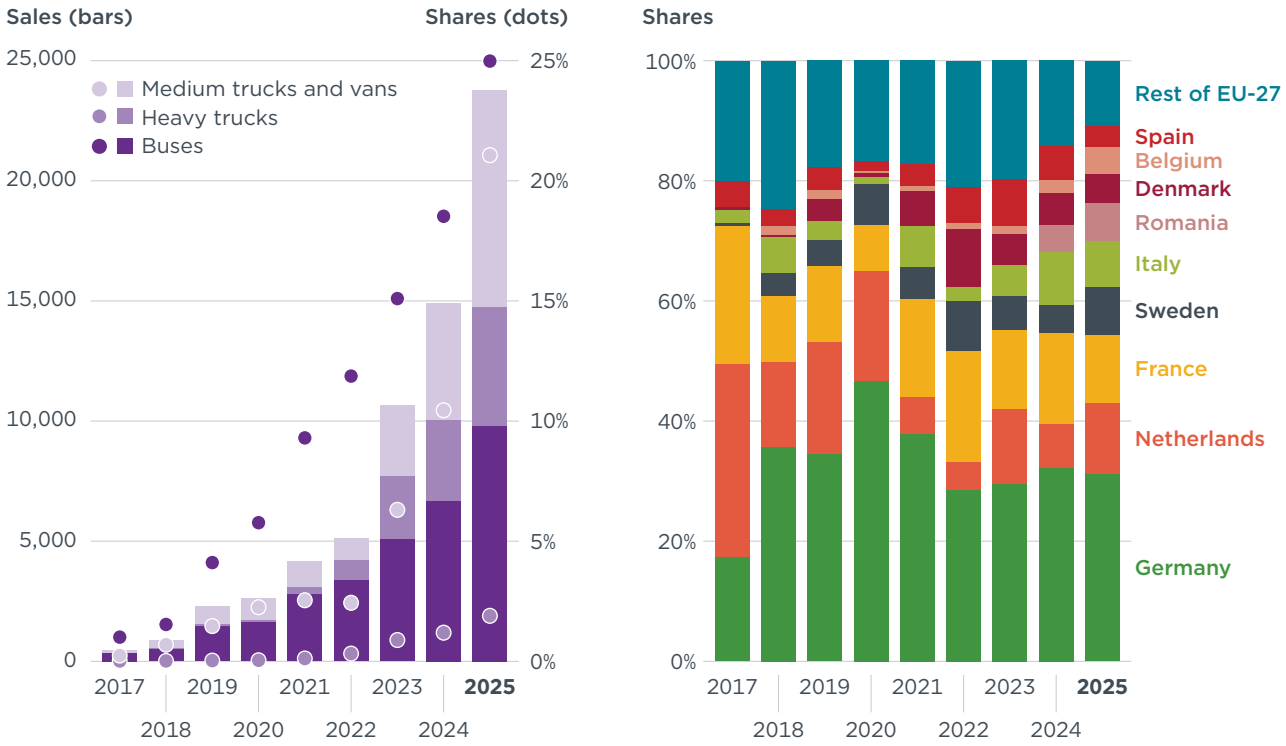
Europe's zero-emission heavy-duty vehicle sales by vehicle type (left) and EU Member State (right)



SUMMARY

Over 23,700 new zero-emission heavy-duty vehicles (ZE-HDVs) were registered in Europe in 2025. ZE trucks (with a weight above 3.5 tonnes) had a sales share of 4.5% in 2025, compared to 2.5% in 2024. ZE buses and coaches had a sales share of 24.8%, compared to 18.5% in 2024.

Sales grew rapidly in the ZE medium truck and van sector (3.5–12 tonnes), whose ZE share more than doubled between 2024 and 2025, from 10.4% to 21.0%. Growth in the sales of ZE buses and coaches—which continue to be dominated by ZE city buses—was also strong. The sales share of ZE city buses grew from 45% to 58% between 2024 and 2025, while ZE interurban buses and coaches remained stagnant at a 4% ZE share across both years.

Mercedes had a remarkable year in the ZE heavy truck (12+ tonne) segment. Sales of its eActros took off in Q3 and Q4 of 2025, likely driven by the CO_2 reduction target of 15% coming into effect on July 1st. In the latter half of 2025 alone, Mercedes sold 1,400 ZE heavy trucks—a three-fold increase over its sales in all of 2024. Mercedes is now by far the largest provider of ZE heavy trucks in the EU.

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OVERALL MARKET DEVELOPMENTS

The overall market for HDVs experienced a downturn of 5% in 2025 compared to 2024, falling from 370,000 sales to 350,000. This continues a general downward trend since HDV sales peaked in 2023 at 520,000 sales—the highest volume reached in the EU-27 since 2008. Among the top markets, between 2024 and 2025, Germany's share of HDVs sold in Europe fell from 26.0% to 24.2% and the Netherlands' share fell from 5.4% to 3.5%, while Poland's share grew from 7.0% to 8.4%. Lithuania stood out among smaller markets, as its share of HDVs sold in Europe increased by 39% over the same period.

Among manufacturers, between 2024 and 2025, the market share of Iveco and DAF slipped by 1.1 and 1.2 percentage points (pp), respectively; meanwhile, MAN (+0.7 pp) and Volvo Trucks (+0.6 pp) saw modest growth. The share of HDVs sold by Mercedes, Renault Trucks, and Scania remained mostly unchanged. Automakers outside of these legacy manufacturers (grouped as "Others" in the figure) also gained ground in 2025, with a 0.8 pp increase in collective market share compared to 2024.

Figure 1.1

Sales of heavy-duty vehicles by Member State

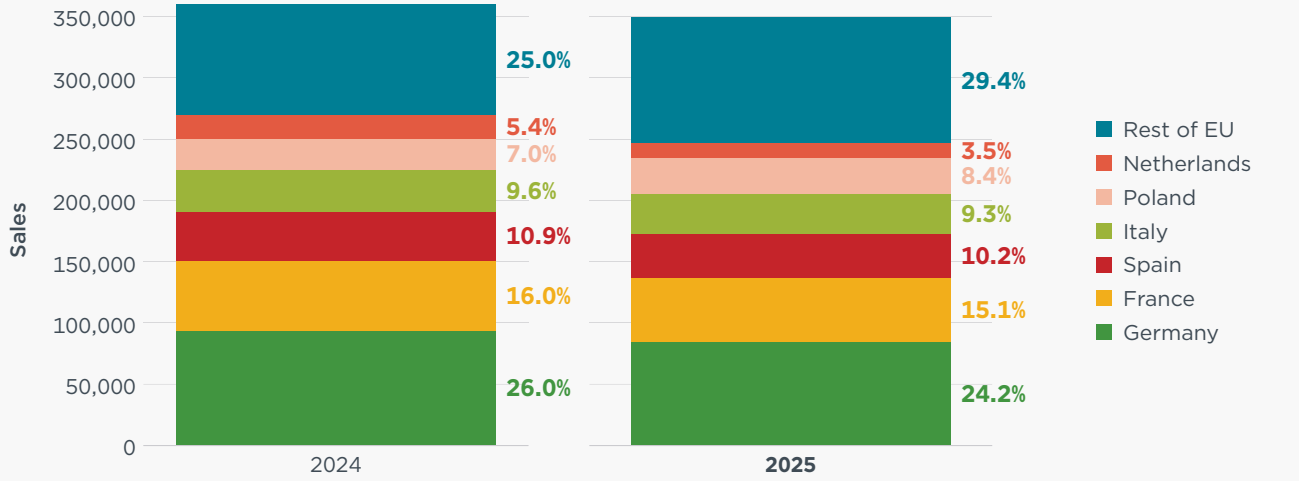

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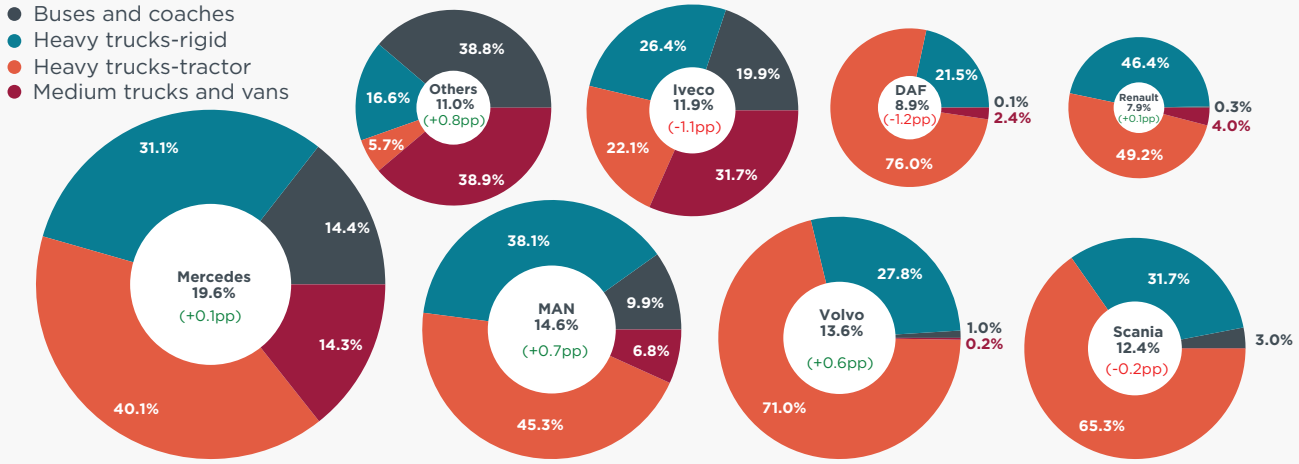
Figure 1.2

Manufacturer market share by vehicle segment in 2025



Note: Values in parentheses denote percentage-point changes in market share relative to 2024.

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HEAVY TRUCKS

TRUCKS WITH A GROSS VEHICLE WEIGHT ABOVE 12 TONNES

In 2025, 263,000 heavy trucks were sold in the European Union (EU-27), of which close to 5,000 were zero-emission vehicles—a 1.9% share, up from 1.2% the previous year. The sales share of ZE heavy trucks in Q4 2025 was 2.7%.

Mercedes had a bumper year for ZE heavy truck sales in 2025. Driven primarily by the success of the eActros, Mercedes' sales share of ZE heavy trucks rose sharply, from 1% in Q1 to 5% in Q3 and Q4. A tightening of CO_2 standards likely drove this increase in sales: trucks first registered between Q3 2025 and Q2 2026 must emit 15% less CO_2 than those first registered between Q3 2019 and Q2 2020. A 2025 ICCT report found that Mercedes was one of the only manufacturers not on track to meet these targets—other manufacturers had focused more heavily on CO_2 reducing technologies for their internal combustion engine vehicles—and assessed that the automaker would require a ZE share of 3.4% to close this gap.[1] Based on its recent ZE sales, Mercedes now seem likely to meet the CO_2 reduction target. Meanwhile, the sales share of ZE heavy trucks remained broadly stagnant throughout 2025 for all other major manufacturers, with Renault Trucks hovering around 3%, Volvo Trucks around 2%, and all others between 0% and 1%.

Sales of ZE heavy trucks were particularly high in Q4 2025 in the Netherlands (320 sales, representing a 14% sales share), Sweden (120 sales, 8.4%), and Denmark (110 sales, 16%). The uptake of ZE heavy trucks was also considerable in Austria and Greece in Q4 2025, with 11% of newly registered vehicles being zero emission. This equates to 160 units in Austria but just 11 in Greece, where the truck market is much more reliant on secondhand imports than firsthand sales.

Figure 2.1

Sales of heavy trucks by powertrain in Q4 2025

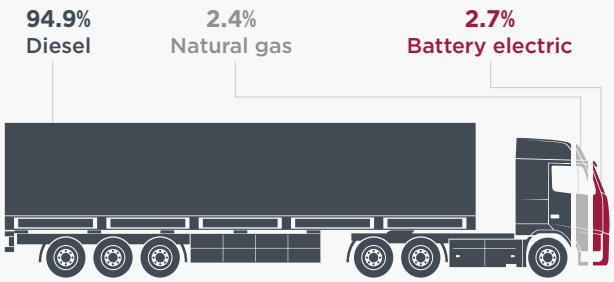

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Figure 2.2

Historic sales of zero-emission heavy trucks

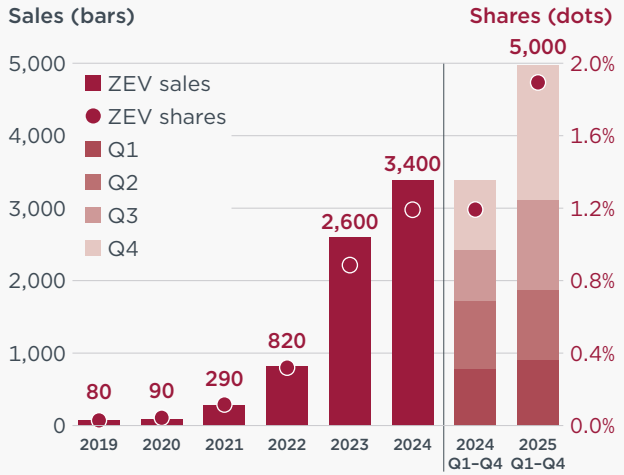

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Figure 2.3

Sales of heavy trucks by Vehicle Energy Consumption calculation TOol (VECTO) group and powertrain in 2025

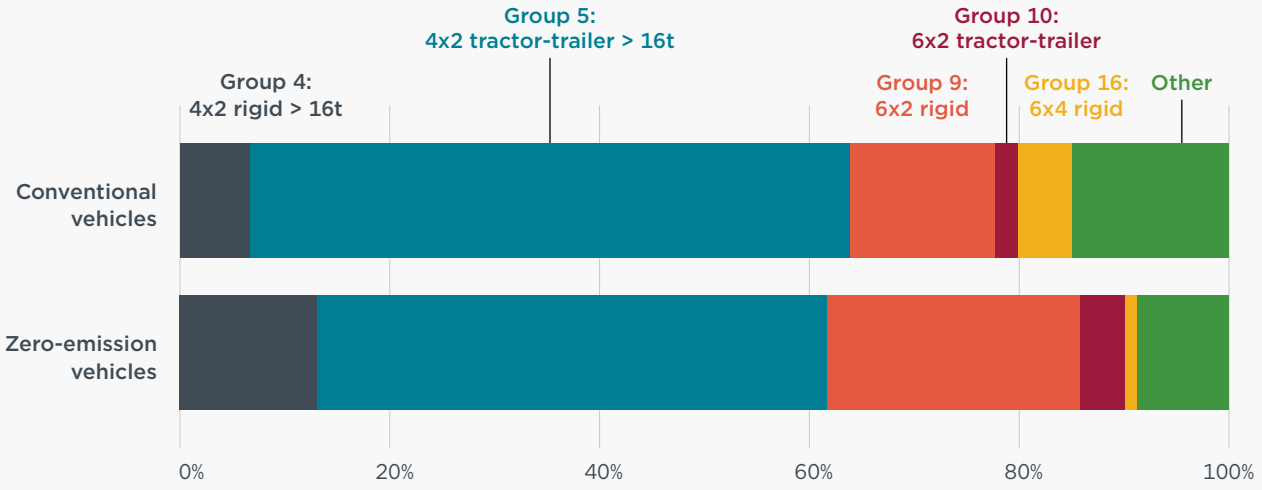

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Figure 2.4

Sales shares of zero-emission heavy trucks in select Member States

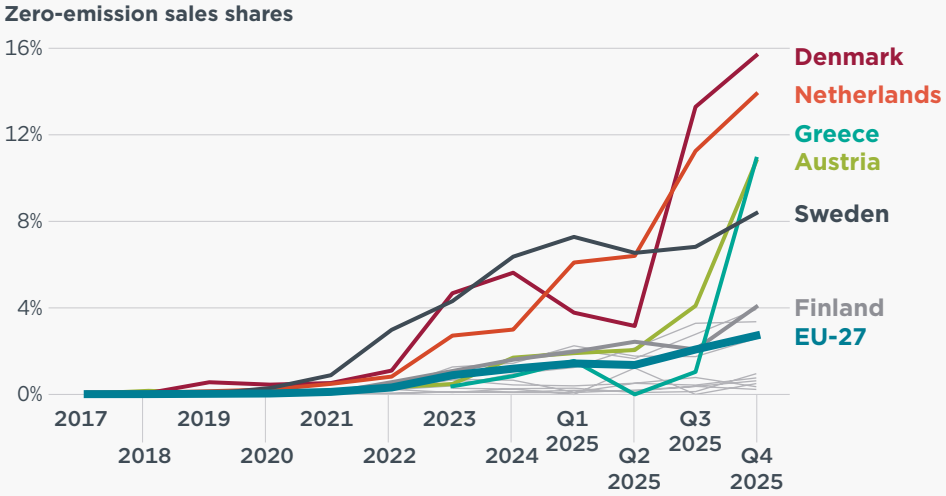

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Figure 2.5

Shares of heavy trucks by powertrain and manufacturer in 2025

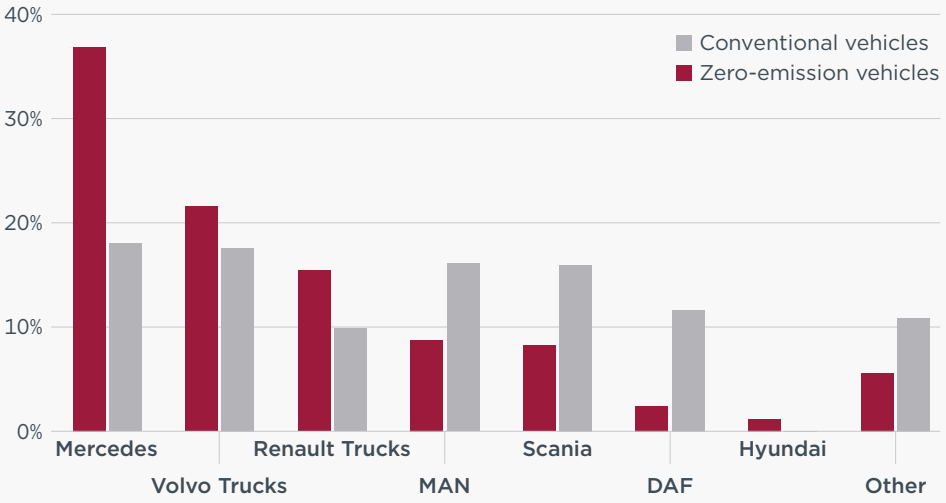

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Table 1

Sales of zero-emission heavy trucks in EU-27 countries (sales shares are shown in parentheses)

Country	Q4 2024	Q4 2025	Q1–Q4 2024	Q1–Q4 2025
Austria	25 (1.8%)	160 (10.8%)	125 (1.7%)	288 (4.5%)
Belgium	18 (1.2%)	61 (3.4%)	78 (1.0%)	191 (2.4%)
Croatia	0 (0.0%)	0 (0.0%)	1 (0.1%)	0 (0.0%)
Czechia	7 (0.3%)	11 (0.5%)	11 (0.1%)	38 (0.5%)
Denmark	71 (9.0%)	110 (15.7%)	210 (5.6%)	275 (7.5%)
Estonia	0 (0.0%)	0 (0.0%)	1 (0.2%)	3 (0.5%)
Finland	0 (0.0%)	19 (3.9%)	15 (1.1%)	53 (2.5%)
France	269 (2.5%)	295 (2.6%)	654 (1.4%)	866 (2.1%)
Germany	302 (2.1%)	630 (3.9%)	1,198 (1.7%)	1,637 (2.6%)
Greece	2 (1.9%)	11 (10.9%)	4 (0.8%)	14 (3.2%)
Hungary	0 (0.0%)	11 (0.7%)	4 (0.1%)	29 (0.6%)
Ireland	2 (1.0%)	2 (0.8%)	17 (0.7%)	9 (0.4%)
Italy	2 (0.0%)	38 (0.6%)	29 (0.1%)	80 (0.3%)
Latvia	0 (0.0%)	0 (0.0%)	2 (0.2%)	0 (0.0%)
Lithuania	2 (0.1%)	0 (0.0%)	2 (0.0%)	3 (0.0%)
Luxembourg	1 (0.8%)	1 (0.5%)	2 (0.2%)	4 (0.4%)
Netherlands	99 (1.7%)	323 (13.9%)	491 (3.0%)	887 (9.3%)
Poland	2 (0.1%)	12 (0.2%)	22 (0.1%)	35 (0.1%)
Portugal	2 (0.5%)	17 (1.0%)	11 (0.8%)	23 (0.4%)
Romania	1 (0.1%)	2 (0.1%)	4 (0.1%)	21 (0.3%)
Slovakia	1 (0.1%)	2 (0.3%)	4 (0.1%)	10 (0.3%)
Slovenia	0 (0.0%)	1 (0.2%)	2 (0.1%)	7 (0.3%)
Spain	32 (0.4%)	26 (0.4%)	125 (0.4%)	121 (0.5%)
Sweden	102 (7.3%)	121 (8.4%)	344 (6.4%)	382 (7.3%)
EU-27	940 (1.5%)	1,853 (2.7%)	3,356 (1.2%)	4,976 (1.9%)

MEDIUM TRUCKS AND VANS

TRUCKS AND VANS WITH A GROSS VEHICLE WEIGHT BETWEEN 3.5 TONNES AND 12 TONNES

In 2025, 42,800 medium trucks and vans were sold in the EU-27, of which 9,000 were zero-emission vehicles—a 21% share, up from 10% the previous year. The sales share of ZE medium trucks and vans in Q4 2025 was 22%.

Sales of ZE medium trucks and vans increased 10-fold over the past 3 years, rising from 900 sales in 2022 to 9,000 in 2025. This growth was overwhelmingly concentrated in the van sector: over 50% of van sales were ZE in 2025, compared to just 3% of medium truck sales. Considering that trucks make up nearly two thirds of vehicle sales in the medium truck and van sector, and that the availability of ZE medium truck models is limited, this rate of growth may start to plateau in the coming years. However, most vehicles with a gross vehicle weight between 5 and 12 tonnes will be required to reduce their average CO_2 emissions by 43% by 2030 relative to 2025, which may yet drive more ZE models to the market in the coming years.

Zero-emission sales shares remained particularly high in Q4 2025 across the northern European countries of the Netherlands (72%), Sweden (63%), and Denmark (66%). The sales share dropped slightly in Germany to 26%, from 34% in Q3 2025.

Figure 3.1

Sales of medium trucks and vans by powertrain in Q4 2025

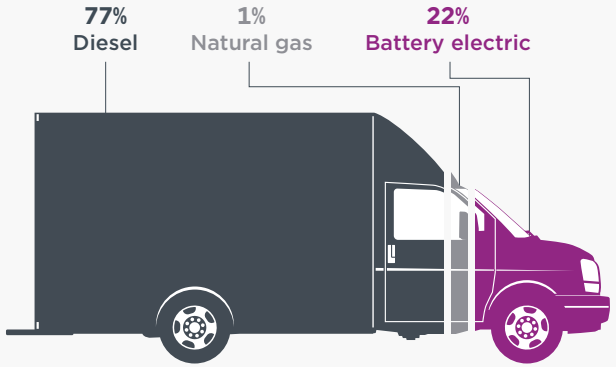

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Figure 3.2

Historic sales of zero-emission medium trucks and vans

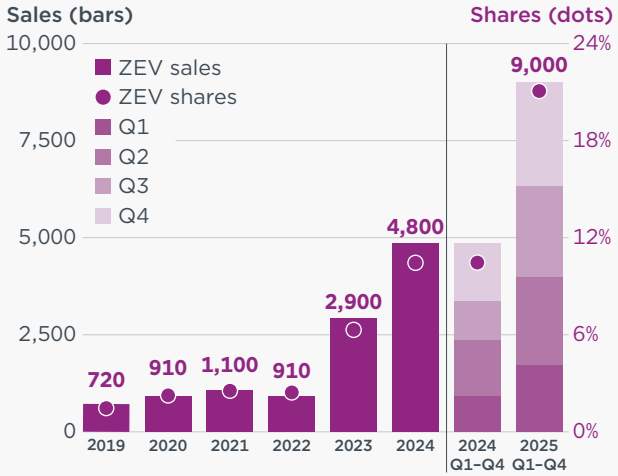

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Figure 3.3

Sales of medium trucks and vans by VECTO category and powertrain in 2025

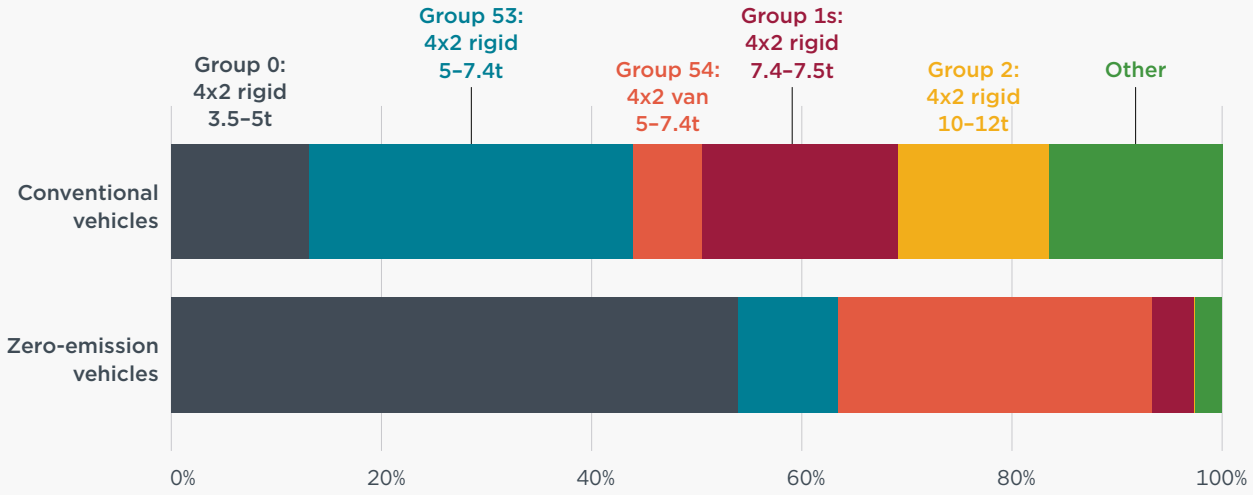

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Figure 3.4

Sales shares of zero-emission medium trucks and vans in select Member States

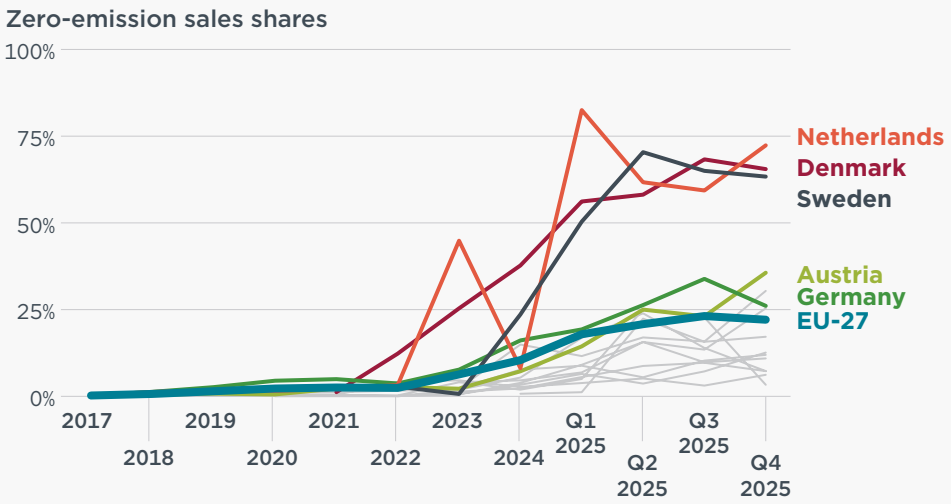

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Figure 3.5

Shares of medium trucks and vans by powertrain and manufacturer in 2025

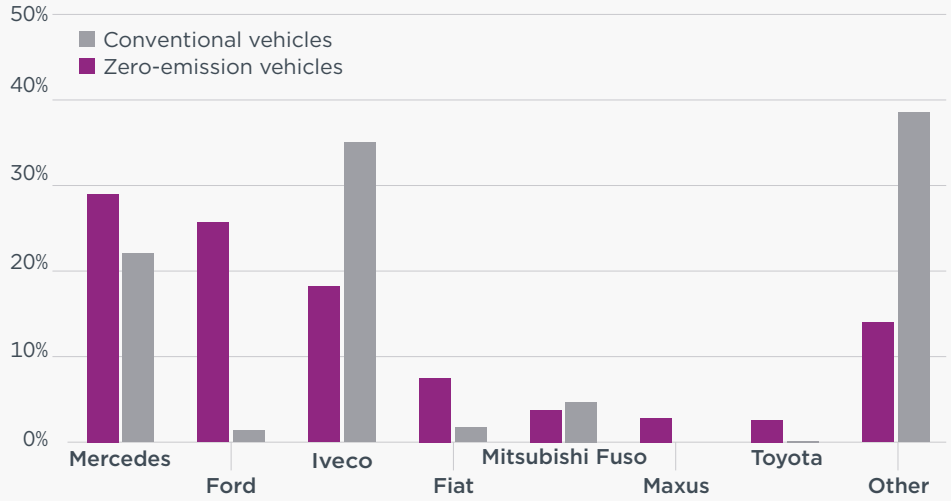

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Table 2

Sales of zero-emission medium trucks and vans in EU-27 countries (sales shares are shown in parentheses)

Country	Q4 2024	Q4 2025	Q1–Q4 2024	Q1–Q4 2025
Austria	9 (6.0%)	31 (35.6%)	45 (7.2%)	117 (23.6%)
Belgium	12 (4.0%)	34 (10.9%)	48 (3.9%)	138 (11.2%)
Croatia	0 (0.0%)	0 (0.0%)	0 (0.0%)	2 (1.0%)
Cyprus	0 (0.0%)	1 (6.7%)	0 (0.0%)	1 (2.2%)
Czechia	5 (2.1%)	34 (9.4%)	16 (1.5%)	97 (8.7%)
Denmark	74 (47.7%)	169 (65.5%)	213 (37.6%)	473 (62.2%)
Estonia	0 (0.0%)	1 (11.1%)	0 (0.0%)	1 (2.5%)
Finland	9 (8.0%)	14 (12.6%)	17 (2.7%)	36 (7.3%)
France	241 (16.2%)	497 (30.4%)	940 (14.8%)	1,083 (19.5%)
Germany	813 (21.6%)	1,033 (26.1%)	2,692 (16.1%)	3,934 (26.9%)
Greece	1 (1.6%)	17 (17.2%)	3 (0.7%)	60 (15.1%)
Hungary	6 (10.7%)	7 (7.6%)	23 (5.9%)	25 (8.1%)
Ireland	1 (0.9%)	52 (25.4%)	29 (4.6%)	98 (15.9%)
Italy	42 (4.7%)	65 (7.3%)	190 (5.4%)	525 (15.7%)
Latvia	0 (0.0%)	2 (50.0%)	5 (10.4%)	4 (12.5%)
Lithuania	0 (0.0%)	3 (6.7%)	1 (1.2%)	3 (2.9%)
Luxembourg	0 (0.0%)	1 (3.3%)	2 (1.9%)	11 (12.5%)
Netherlands	82 (7.5%)	293 (72.3%)	185 (8.2%)	1,137 (72.1%)
Poland	10 (2.7%)	40 (5.5%)	27 (1.3%)	71 (3.5%)
Portugal	23 (14.1%)	22 (12.0%)	51 (6.5%)	53 (9.7%)
Romania	22 (15.9%)	30 (9.8%)	34 (4.9%)	171 (21.9%)
Slovakia	2 (2.4%)	7 (8.1%)	18 (5.3%)	23 (7.3%)
Slovenia	1 (5.0%)	0 (0.0%)	1 (0.9%)	2 (2.1%)
Spain	40 (2.6%)	115 (6.2%)	169 (2.5%)	326 (4.6%)
Sweden	76 (41.8%)	197 (63.3%)	122 (23.6%)	619 (64.1%)
EU-27	1,469 (13.3%)	2,665 (22.1%)	4,831 (10.4%)	9,010 (21.0%)

BUSES AND COACHES

WITH A GROSS VEHICLE WEIGHT ABOVE 3.5 TONNES

In 2025, 39,500 buses and coaches were sold in the EU-27, of which 9,800 were zero-emission vehicles—a 25% share, up from 17% the year before. The sales share of ZE buses and coaches in Q4 2025 was 29%.

Sales of ZE city buses fell to 54% in Q4 2025, down from about 60% across Q1–Q3 2025. The first phase of the Clean Vehicles Directive, which required Member States to achieve up to a 22.5% ZE share for publicly procured buses, came to a close in Q4 2025. This requirement now rises to 32.5% over 2026–2030.

Sales of ZE buses and coaches rose rapidly in Belgium (which attained a 49% ZE share in 2025, up from 23% in 2024), the Netherlands (72%, up from 46%), and Sweden (46%, up from 31%), while significant drops were seen in Luxembourg (36% in 2025, down from 76% in 2024) and Ireland (3%, down from 28%).

Figure 4.1

Sales of city buses (top), interurban buses and coaches (middle), and minibuses (bottom) by powertrain in Q4 2025

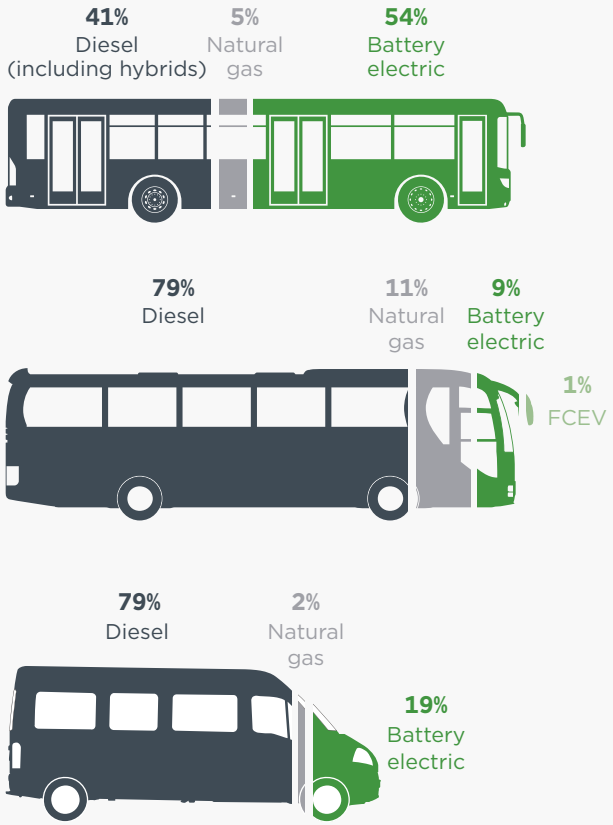

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Figure 4.2

Historic sales of zero-emission buses and coaches

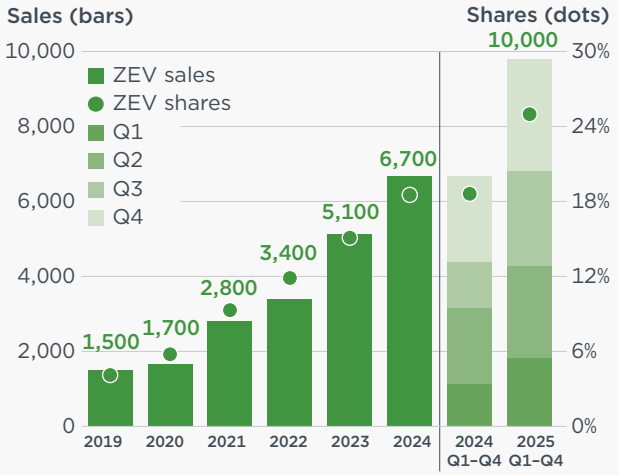

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Figure 4.3

Sales of city buses by powertrain

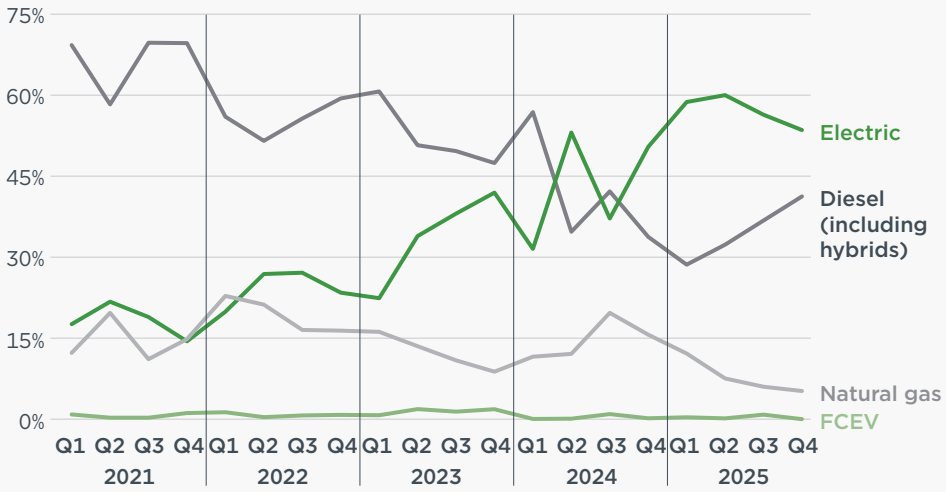

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Figure 4.4

Sales of city buses by powertrain and manufacturer in 2025

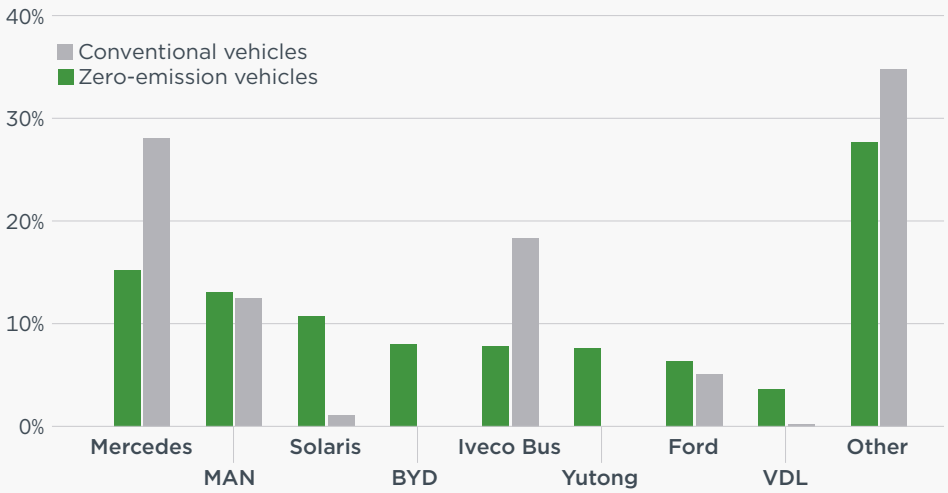

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Figure 4.5

Shares of all buses and coaches by powertrain and manufacturer in 2025

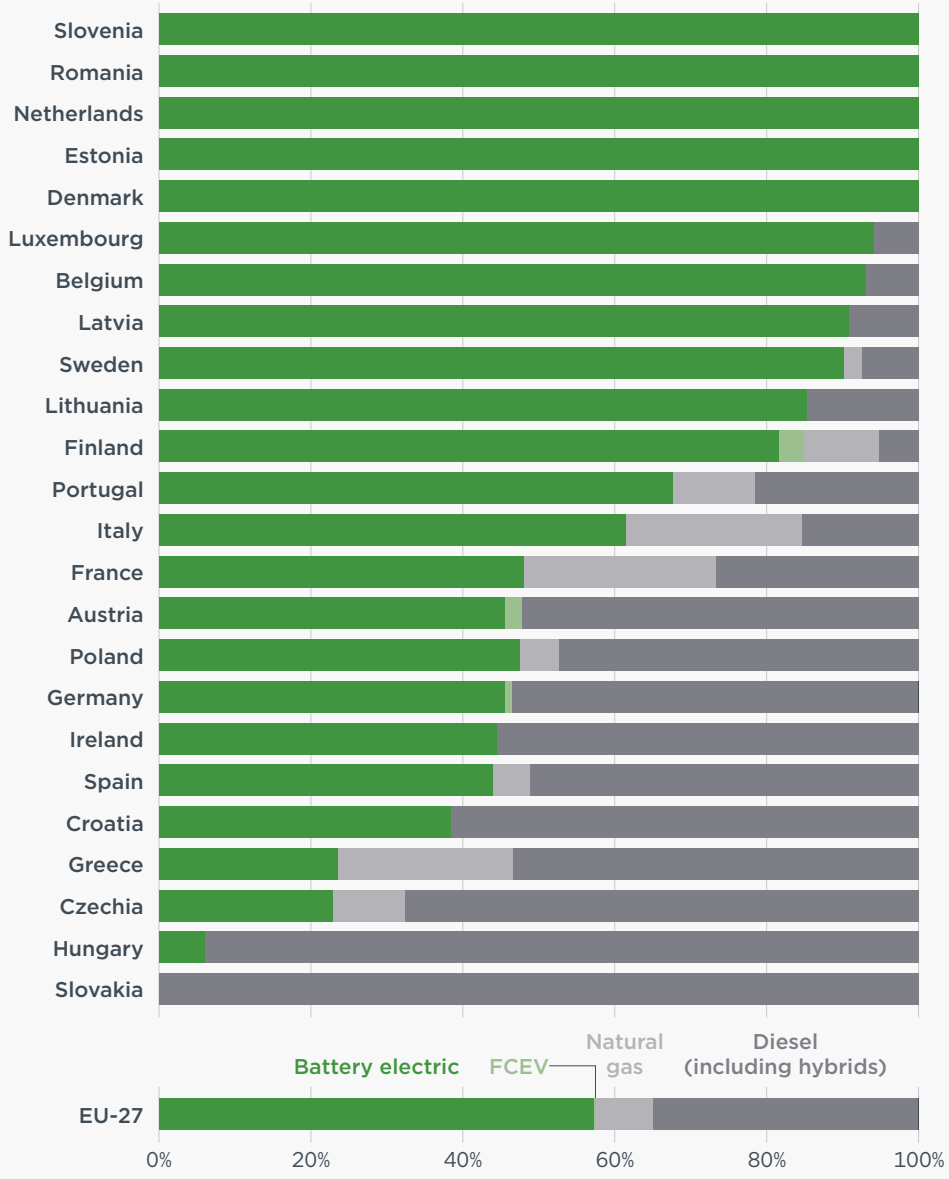

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Table 3

Sales of zero-emission buses and coaches in EU-27 countries (sales shares are shown in parentheses)

Country	Q4 2024	Q4 2025	Q1–Q4 2024	Q1–Q4 2025
Austria	46 (24.9%)	136 (43.6%)	102 (10.1%)	248 (22.6%)
Belgium	81 (48.2%)	51 (27.9%)	194 (23.0%)	711 (48.9%)
Croatia	0 (0.0%)	0 (0.0%)	0 (0.0%)	9 (3.1%)
Cyprus	0 (0.0%)	0 (0.0%)	1 (1.6%)	0 (0.0%)
Czechia	25 (6.1%)	33 (15.2%)	59 (4.4%)	52 (6.4%)
Denmark	115 (85.8%)	110 (78.0%)	380 (67.9%)	410 (71.6%)
Estonia	0 (0.0%)	1 (4.5%)	17 (11.1%)	1 (0.9%)
Finland	0 (0.0%)	25 (56.8%)	135 (82.8%)	145 (63.0%)
France	148 (12.2%)	212 (14.7%)	661 (11.4%)	757 (12.5%)
Germany	207 (17.9%)	644 (30.5%)	732 (13.6%)	1,859 (27.2%)
Greece	3 (3.3%)	6 (4.8%)	272 (44.0%)	118 (17.4%)
Hungary	2 (3.8%)	31 (6.1%)	2 (0.6%)	65 (6.7%)
Ireland	6 (11.5%)	6 (8.2%)	238 (28.1%)	24 (2.7%)
Italy	565 (38.3%)	367 (29.0%)	1,047 (17.1%)	1,217 (24.5%)
Latvia	9 (14.1%)	18 (50.0%)	29 (8.2%)	54 (40.9%)
Lithuania	22 (37.3%)	97 (56.1%)	64 (26.7%)	235 (45.1%)
Luxembourg	78 (84.8%)	31 (39.2%)	238 (75.8%)	92 (35.8%)
Netherlands	217 (47.6%)	363 (91.4%)	409 (46.1%)	784 (71.9%)
Poland	19 (4.8%)	117 (18.2%)	131 (7.8%)	270 (12.6%)
Portugal	21 (25.3%)	58 (37.7%)	114 (15.6%)	113 (12.0%)
Romania	189 (48.0%)	318 (57.7%)	627 (34.6%)	1,288 (53.9%)
Slovakia	0 (0.0%)	8 (8.2%)	0 (0.0%)	8 (3.8%)
Slovenia	0 (0.0%)	7 (23.3%)	4 (2.5%)	14 (5.4%)
Spain	84 (10.1%)	147 (13.4%)	260 (6.0%)	419 (9.6%)
Sweden	164 (59.6%)	201 (47.9%)	251 (31.2%)	901 (45.7%)
EU-27	2,001 (25.8%)	2,987 (29.4%)	5,967 (17.0%)	9,794 (24.9%)

SPOTLIGHT: A COMPARISON OF ZE-HDVS IN CHINA AND EUROPE

Zero-emission HDV uptake is rapidly increasing in China. The country's ZE-HDV sales share surpassed 25% in 2025, with over 450,000 units sold—up from just a 3% share in 2021. In contrast, 23,700 ZE-HDVs were sold in the EU-27 in 2025, representing a 4% sales share.

The sales share of ZE heavy trucks in China has expanded markedly in recent years, rising from 6% in 2023 to 29% in 2025. While the EU-27 market for ZE heavy trucks has grown consistently year-on-year, it remains in the early stages of adoption, reaching a 2.7% ZE sales share in Q4 2025. The deployment of ZE heavy trucks has been driven by both market forces and policy support. The economics of ZE heavy trucks are improving as Chinese manufacturers make their products more affordable and the difference in energy prices between diesel, liquefied natural gas, and electricity improves the total cost of ownership proposition of e-trucks.[2] On the regulatory side, policy tools like the ultra-low emission campaign on heavy industry set clean transportation targets for major industrial sectors (e.g., power plants, steel, and cement), which have driven companies to electrify their transport fleets to remain compliant.[3] Meanwhile, sales shares of ZE medium trucks and vans in China and the EU-27 have followed a similar trajectory, with rapid growth culminating in similar ZE sales shares as of Q4 2025: China at 22% and the EU at 21%.

In the urban bus sector, China has held a near 100% ZE share sales since 2021. Meanwhile, the ZE market share in the EU has more than doubled in the last 3 years, surging from less than 25% in 2023 to 58% in 2025. The ZE share among coaches and interurban buses remains far more limited in both markets. In China, the ZE sales share in this segment has fluctuated in recent years, reaching 10% in 2025. Sales in the EU-27, meanwhile, have only recently begun to grow after several years of negligible uptake, climbing to a 4% ZE market share in 2025.

The vast majority of China's ZE-HDVs are powered by battery electric technology. Hydrogen fuel-cell vehicles comprised less than 1% of sales in 2025. Sales of battery swapping vehicles, mostly limited to tractor-trailers and dump trucks, represented about 15% of total ZE-HDV sales in China in 2025. As of 2025, 136,000 HDV-dedicated chargers were installed in China.[4] These charge points have a power above 240 kW and include both public and private chargers. Although this scale is sufficient to enable fast-paced adoption in some areas, with a ratio of 38 vehicles per charger, coverage remains uneven geographically and limited in overall number. In contrast, only 1,519 publicly available charging points (> 350 kW) were in place in the EU-27 as of 2025, of which just 35% were exclusively dedicated to HDVs.[5]

Figure 5.1

Zero-emission heavy-duty vehicle sales and shares by vehicle type in China (left) and the EU-27 (right)

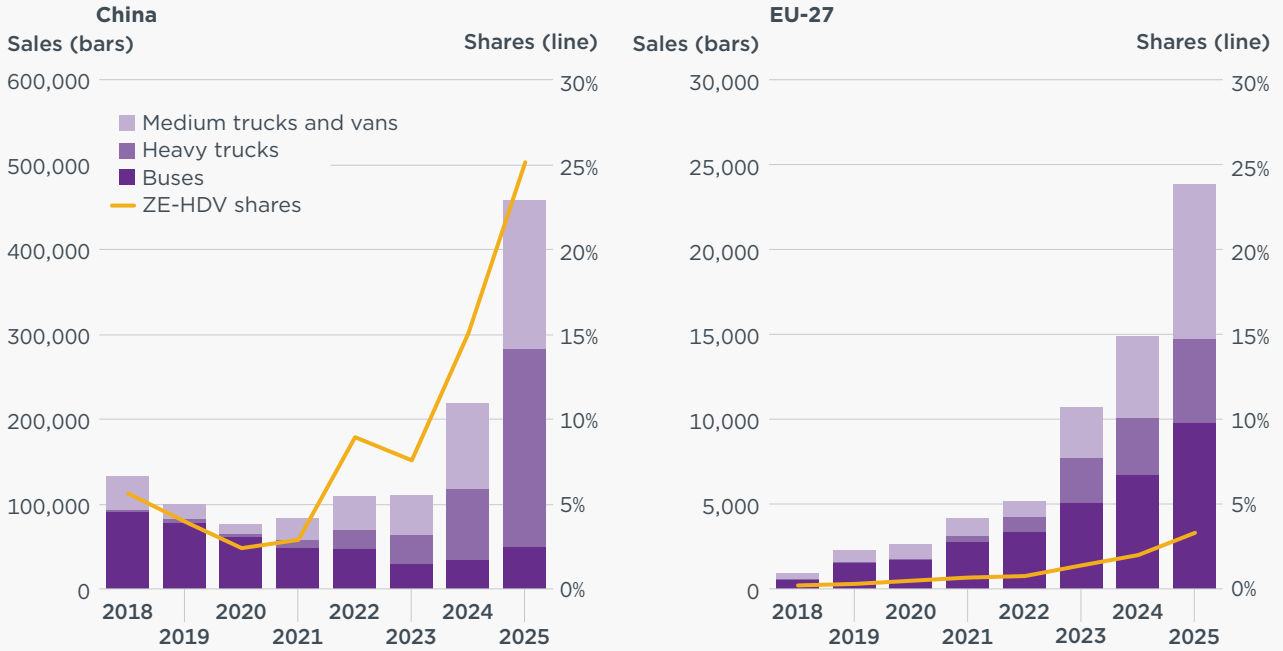

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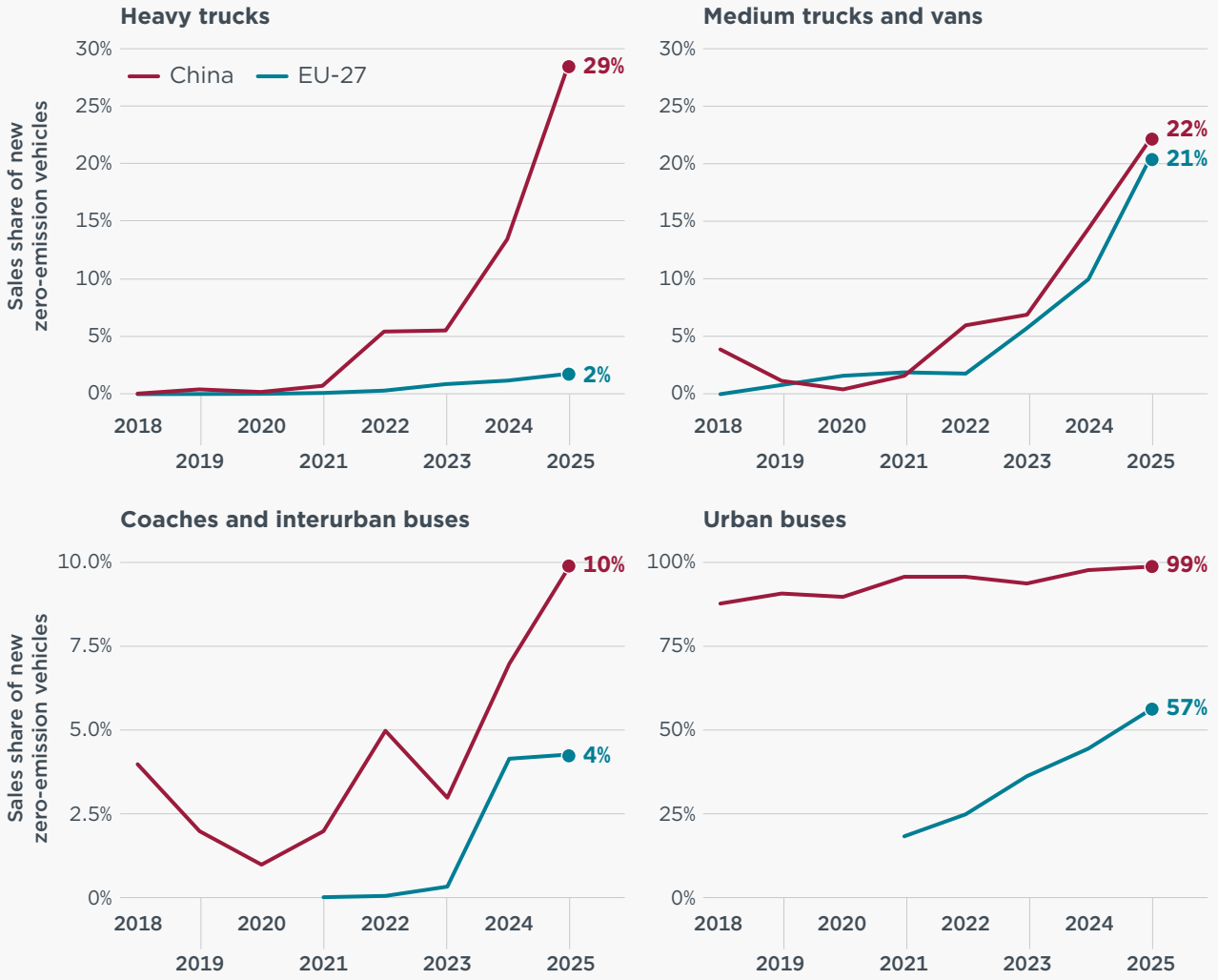
Figure 5.2

Zero-emission heavy-duty vehicle shares by vehicle type in China and the EU-27



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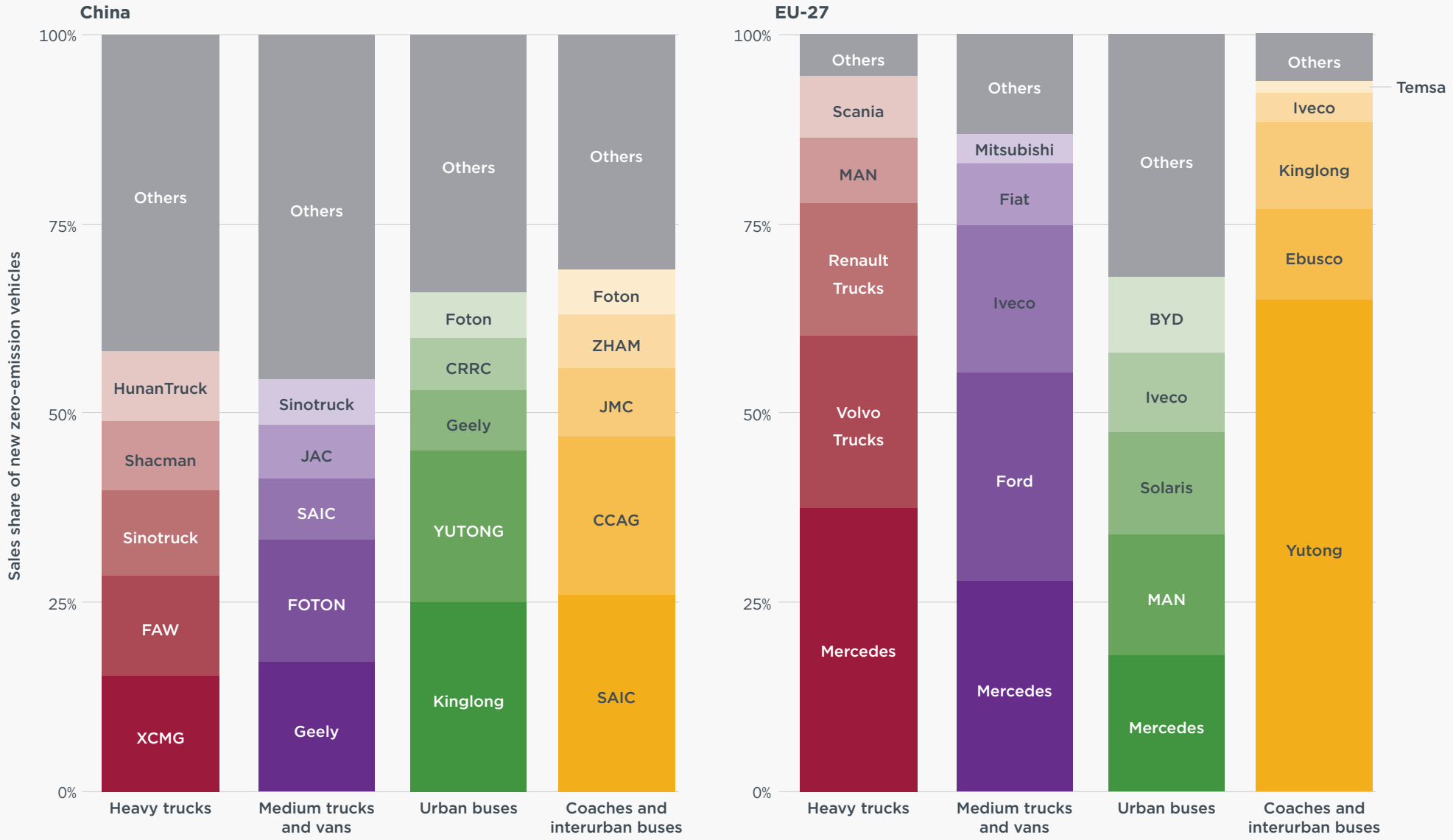
The manufacturing landscape for ZE HDVs in China is fragmented. The top five manufacturers in each HDV segment comprise 53%–67% of all ZE sales, depending on the vehicle type; by contrast, in the EU-27, the top five manufacturers account for 68%–95% of ZE sales. As the ZE-HDV market in the EU-27 continues to mature, so too may the heterogeneity of the market increase.

Few of the dominant ZE-HDV manufacturers in China are active in the EU-27; domestic manufacturers account for nearly all ZE truck sales in the EU-27 with the exception of Ford, which is based in Türkiye. However, Chinese manufacturers make up a large share of the EU interurban bus and coach market, with Yutong capturing two-thirds of bus sales. BYD ranks among the top five manufacturers of urban buses.

Chinese manufacturers have sought to expand their presence in Europe. BYD, for instance, is establishing a plant in Komárom, Hungary, with an investment of $94 million; when complete, it is slated to produce roughly 1,000 ZE trucks and buses per year.[6] Windrose previously announced plans to deliver a 670 km range truck priced at €250,000 by early 2026 following its certification in late 2025, and registered its first truck in Europe at the beginning of 2026.[7] SANY, meanwhile, plans to deliver its e263 tractor in Q1 2026, featuring a 636 kWh battery and a 500 km range, supported by a service partnership with Alltrucks to ensure European maintenance while production remains in China.[8] Additionally, Chinese manufacturer SuperPanther is partnering with Steyr Automotive in Austria, with plans to have Steyr assemble the eTopas600 with series production starting in summer 2026.[9]

Figure 5.3

Sales shares of zero-emission heavy-duty vehicles by vehicle type by manufacturer in China (left) and the EU-27 (right)



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DEFINITIONS, DATA SOURCES, METHODOLOGY, AND ASSUMPTIONS

A **zero-emission vehicle** is any vehicle whose propulsion system produces zero combustion emissions, such as a dedicated battery electric, fuel-cell electric, or other motor that is not driven by combustion.

A **heavy-duty vehicle** is a commercial vehicle, intended for the transport of passengers or freight, with a gross vehicle weight above 3.5 tonnes.

A **heavy truck** is a truck with a gross vehicle weight above 12 tonnes.

A **medium truck** is a truck with a gross vehicle weight between 3.5 and 12 tonnes.

A **medium van** is a van with a gross vehicle weight between 3.5 and 12 tonnes.

A **city bus** is a passenger vehicle with a gross vehicle weight above 7.5 tonnes that is used exclusively in urban environments.

An **interurban bus** is a passenger vehicle with a gross vehicle weight above 7.5 tonnes that is used in both urban and regional environments.

A **coach** is a passenger vehicle with a gross vehicle weight above 3.5 tonnes that is used exclusively in regional environments.

A **minibus** is a passenger vehicle with a gross vehicle weight between 3.5 and 7.5 tonnes.

For Europe, all data were supplied by Dataforce and cover all EU-27 countries, except for Malta.

For China, data for 2018–2022 were sourced from ZEDATA and data for 2023–2025 were sourced from Gasgoo.

ENDNOTES

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