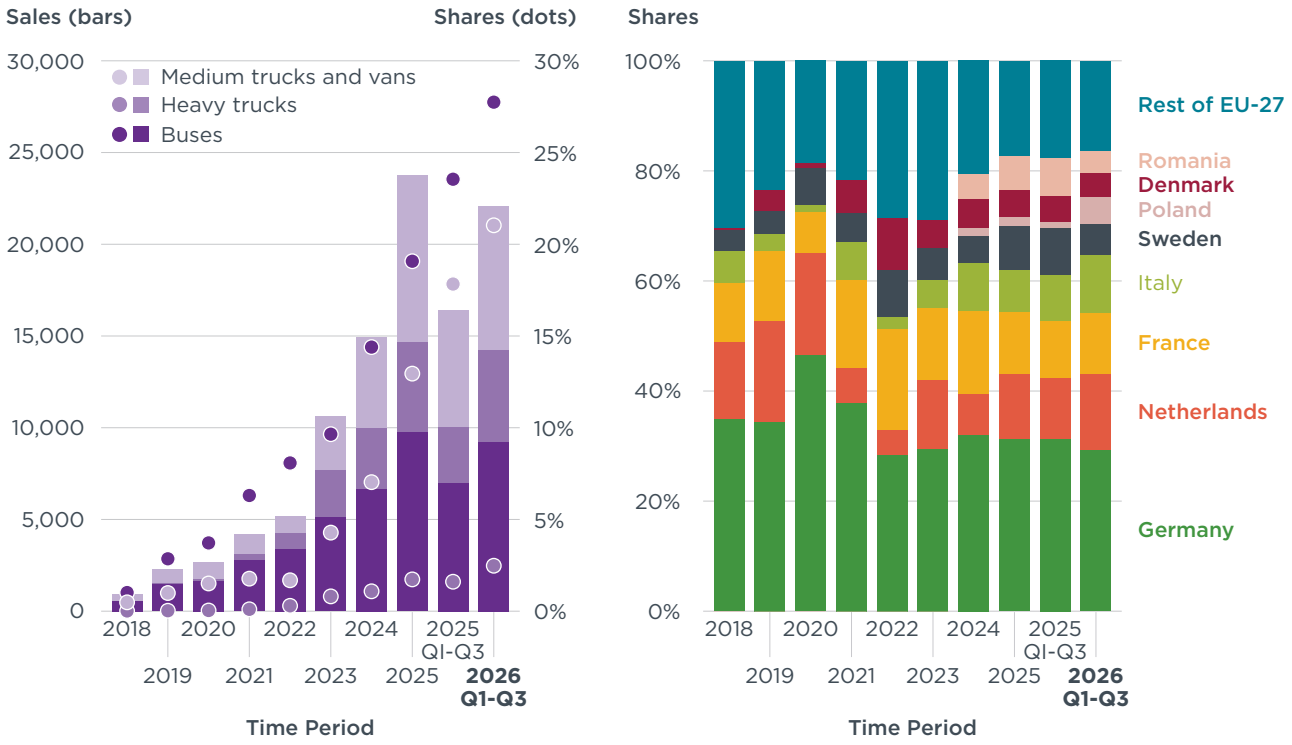
EUROPEAN HEAVY-DUTY VEHICLE MARKET DEVELOPMENT QUARTERLY (JANUARY–SEPTEMBER 2026)

EAMONN MULHOLLAND, MALO BENOIT

Zero-emission heavy-duty vehicle sales in the EU by vehicle type (left) and Member States (right)



SUMMARY

Approximately 22,100 new zero-emission heavy-duty vehicles (ZE-HDVs) were registered in the European Union (EU) in the first three quarters (Q1–Q3) of 2026. ZE trucks (with a weight above 3.5 tonnes) had a sales share of 5.3% in Q1–Q3 2026, up from 4.2% in Q1–Q3 2025. ZE buses and coaches had a sales share of 27.7% in Q1–Q3 2026, up from 23.1% in Q1–Q3 2025.

Sales of ZE heavy trucks (with a weight above 12 tonnes) reached 5,000 units in Q1–Q3 2026 (2.5% of all sales), up from 3,100 in Q1–Q3 2025 (1.6%).

Sales of ZE medium trucks and vans (with a weight of 3.5–12 tonnes) reached 7,800 in Q1–Q3 2026 (21.0% of all sales), up from 6,400 in Q1–Q3 2025 (17.7%). Half of these sales were concentrated in Germany. Denmark had the highest ZE share in this segment in Europe, soaring to 80% in Q3 2026.

Sales of ZE buses and coaches reached 9,200 units in Q1–Q3 2026 (27.7% of all sales), up from 6,800 units in Q1–Q3 2025 (23.2%). Greece saw a notable year-over-year jump in ZE sales share in this segment, from 4% in Q3 2025 to 74% in Q3 2026—second only to the Netherlands' 90% share—though the majority of sales this quarter came from a large one-time purchase of Yutong buses by the city of Athens funded under the Recovery and Resilience Facility.

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OVERALL MARKET DEVELOPMENTS

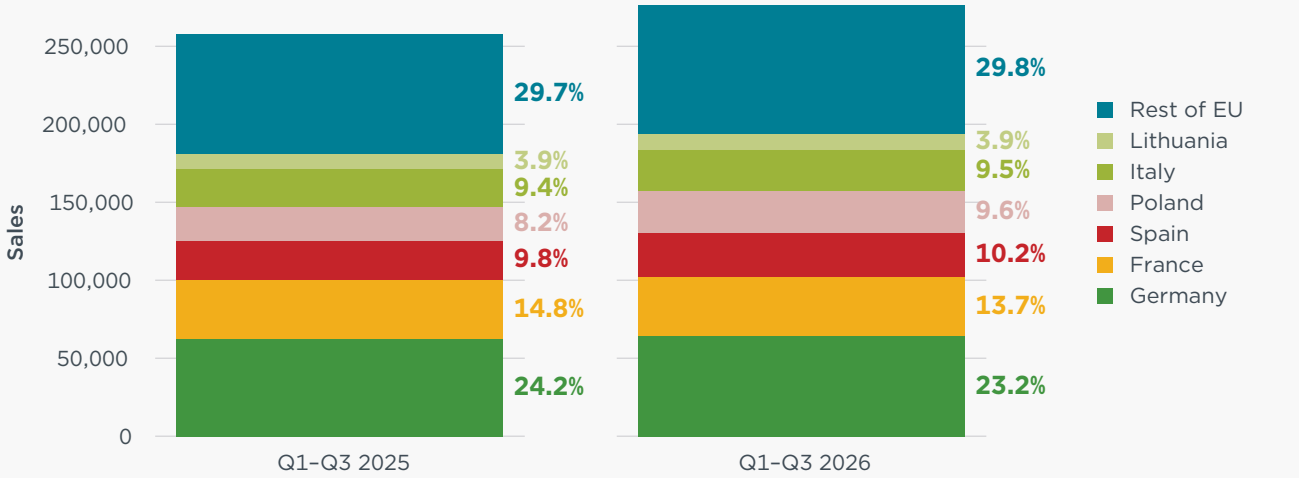
Approximately 277,000 HDVs were sold in Europe in Q1–Q3 2026, up from 259,000 in Q1–Q3 2025, a 6.7% increase. By Member State, Poland's HDV market grew the most, both in absolute terms and in percentage points (pp) of market share growth: sales of HDVs in the country increased by 5,400 vehicles between Q1–Q3 2025 and Q1–Q3 2026, increasing Poland's share of the overall European market by 1.4 pp, from 8.2% to 9.6%. France, by contrast, saw its share fall from 14.7% to 13.7%. Meanwhile, HDV sales volumes grew sharply in Portugal (by 39%) and in the Netherlands (by 32%) between Q1–Q3 2025 and Q1–Q3 2026, while they fell most rapidly in Bulgaria (by 10%) over the same period.

By manufacturer, Iveco experienced the largest percentage-point decrease in market share year-over-year, dropping 1.3 pp, followed by Scania (-1.1 pp). By contrast, Mercedes (+1.5 pp), DAF (+0.2 pp), MAN (+0.1 pp), Volvo (+0.1 pp), and Renault (+0.1 pp) registered increases. The collective market share of other manufacturers grew by 0.4 pp.

During IAA Transportation 2026, a leading transportation trade show held in September, Volvo Trucks, MAN, Scania, and Renault Trucks presented new lineups of electric vehicles. Looking ahead, Tata Motors is set to take over Iveco Group after securing about 89% of its shares in a tender offer that closed on October 26.[1]

Figure 1.1

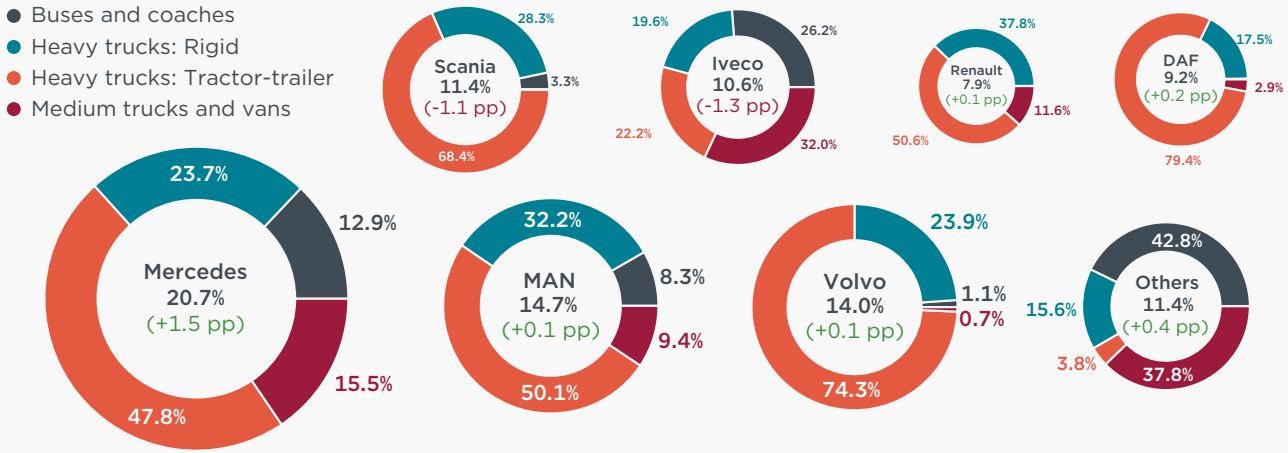
Sales of heavy-duty vehicles by Member State share, Q1–Q3 2025 and Q1–Q3 2026



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Figure 1.2

Manufacturer market share by vehicle segment, Q1–Q3 2026



Note: Values in parentheses denote percentage-point changes in market share relative to Q1–Q3 2025.

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HEAVY TRUCKS

TRUCKS WITH A GROSS VEHICLE WEIGHT ABOVE 12 TONNES

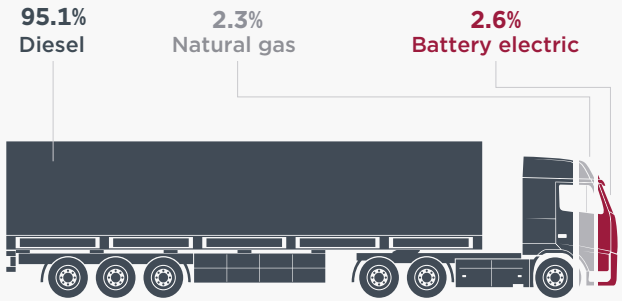
In Q1–Q3 2026, 204,000 heavy trucks were sold in the EU, of which around 5,000 were ZE vehicles—a 2.5% share, up from 1.6% in Q1–Q3 2025.

Over the first three quarters of the year, the EU heavy truck segment grew by close to 7% in volume. Zero-emission sales grew much faster, by close to 65%. Iveco recorded the largest relative increase, from very low sales of 10 ZE trucks in Q1–Q3 2025 to 108 in Q1–Q3 2026; this was followed by DAF, whose sales grew from 83 to 451 year-over-year, while Mercedes recorded the largest absolute increase, from about 1,000 to close to 2,000 ZE trucks. Mercedes still leads the segment in overall sales, while MAN became the second-largest seller, registering close to a fourfold increase to 924 vehicles. Volvo, the second-largest seller in Q1–Q3 2025, saw its ZE sales fall by close to 30%, to 568 vehicles.

Between Q1–Q3 2025 and Q1–Q3 2026, ZE heavy truck sales doubled in Germany and increased by close to 30% in the Netherlands. Together, these countries comprised over half of all ZE heavy truck sales. In France, the ZE share of heavy truck sales more than doubled year-over-year, to 4.0% (321 units) in Q3 2026, up from 1.8% in Q3 2025 and Q2 2026. This increase was supported by subsidies provided under the French electrification plan: since June 1, 2026, incentives of over €100,000 have been made available through the Energy Savings Certificates (CEE) scheme for the purchase of a new electric tractor assembled in the European Economic Area.[2]

Figure 2.1

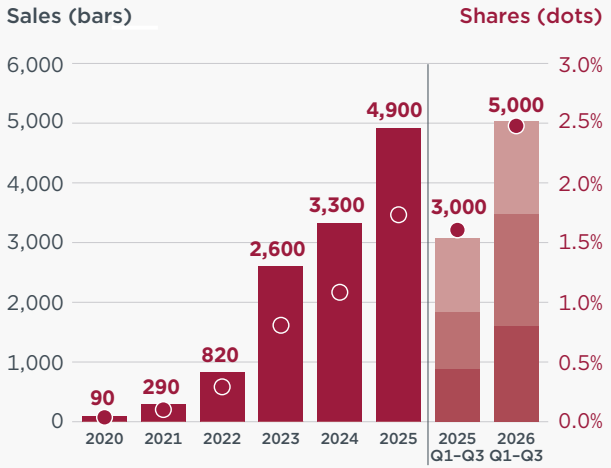
Sales of heavy trucks by powertrain, Q3 2026



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Figure 2.2

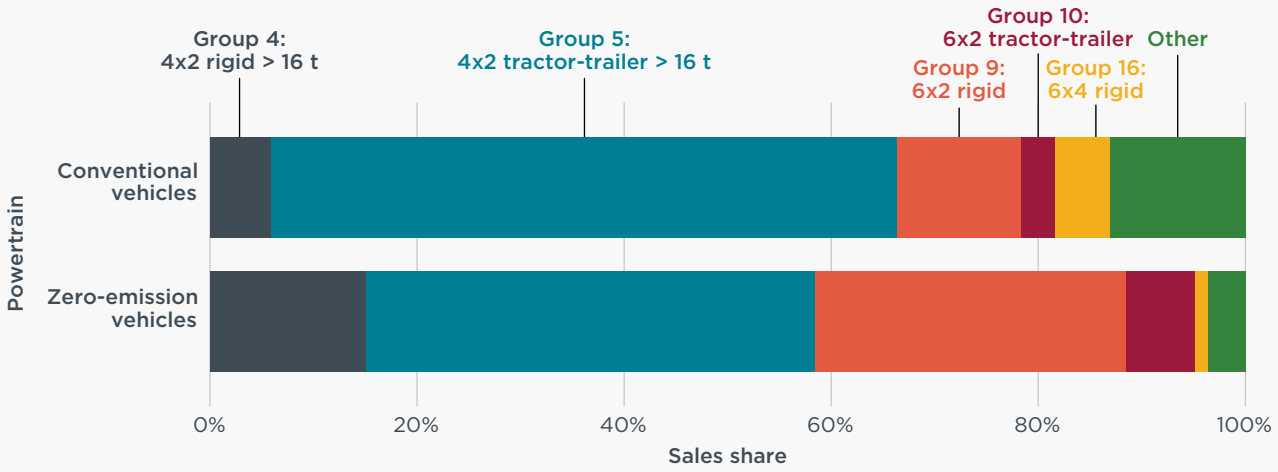
Historic sales of zero-emission heavy trucks



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Figure 2.3

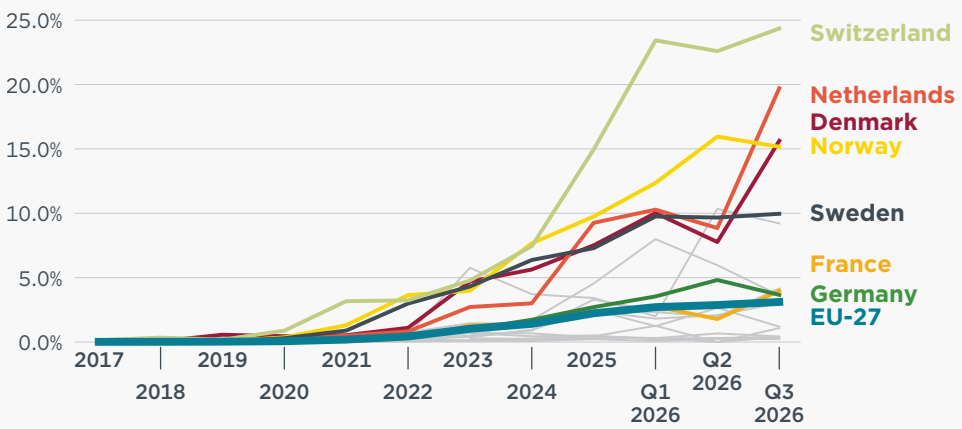
Sales of heavy trucks by Vehicle Energy Consumption calculation TOol (VECTO) group and powertrain, Q1–Q3 2026



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Figure 2.4

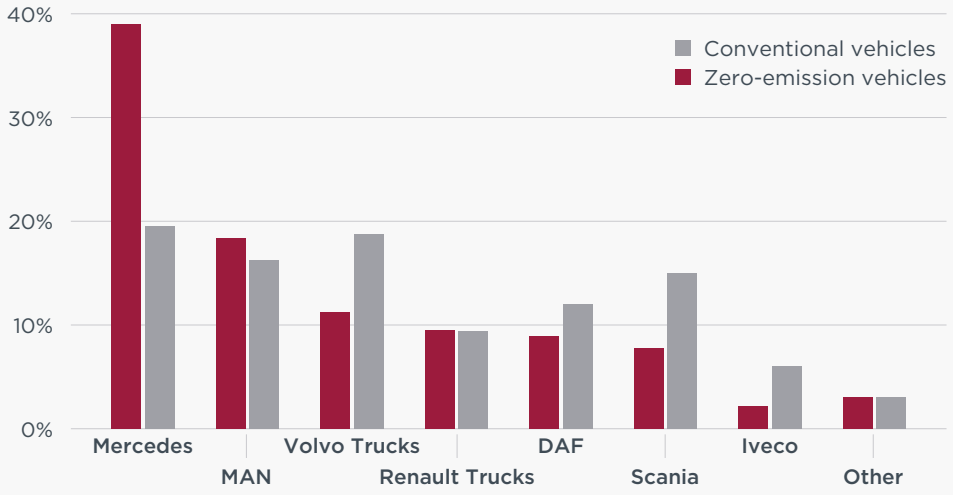
Sales shares of zero-emission heavy trucks in select countries



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Figure 2.5

Sales shares of heavy trucks by powertrain and manufacturer, Q1–Q3 2026



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Table 1

Sales of zero-emission heavy trucks by EU Member State

Country	Q3 2025	Q3 2026	Q1–Q3 2025	Q1–Q3 2026
Austria	61 (4.1%)	56 (3.6%)	128 (2.6%)	300 (5.9%)
Belgium	56 (3.3%)	69 (4.2%)	130 (2.1%)	160 (2.7%)
Croatia	0 (0.0%)	0 (0.0%)	0 (0.0%)	1 (0.1%)
Czechia	15 (0.8%)	5 (0.3%)	27 (0.5%)	15 (0.2%)
Denmark	86 (13.3%)	75 (15.6%)	165 (5.6%)	272 (10.0%)
Estonia	1 (0.9%)	1 (0.7%)	3 (0.6%)	1 (0.2%)
Finland	10 (2.0%)	–	34 (2.1%)	–
France	157 (1.8%)	321 (4.0%)	571 (2.0%)	774 (2.8%)
Germany	417 (3.0%)	488 (3.7%)	974 (2.2%)	1,813 (4.0%)
Greece	1 (1.1%)	1 (1.2%)	3 (0.9%)	7 (2.2%)
Hungary	7 (0.6%)	5 (0.3%)	18 (0.5%)	15 (0.4%)
Ireland	3 (0.4%)	3 (0.4%)	7 (0.3%)	6 (0.3%)
Italy	20 (0.4%)	21 (0.4%)	42 (0.2%)	60 (0.3%)
Latvia	0 (0.0%)	2 (0.7%)	0 (0.0%)	2 (0.2%)
Lithuania	2 (0.1%)	1 (0.0%)	3 (0.0%)	1 (0.0%)
Luxembourg	0 (0.0%)	3 (1.1%)	3 (0.4%)	6 (0.8%)
Netherlands	248 (11.2%)	325 (19.7%)	561 (7.8%)	1,048 (11.3%)
Poland	14 (0.2%)	10 (0.2%)	23 (0.1%)	29 (0.1%)
Portugal	2 (0.1%)	10 (0.4%)	6 (0.2%)	23 (0.4%)
Romania	8 (0.4%)	4 (0.2%)	19 (0.3%)	25 (0.4%)
Slovakia	4 (0.6%)	5 (0.7%)	8 (0.4%)	10 (0.4%)
Slovenia	4 (0.9%)	3 (0.6%)	6 (0.4%)	4 (0.2%)
Spain	43 (0.8%)	22 (0.4%)	95 (0.6%)	54 (0.3%)
Sweden	79 (6.8%)	124 (9.9%)	261 (6.9%)	392 (9.8%)
EU-27	1,238 (2.1%)	1,554 (2.6%)	3,087 (1.6%)	5,038 (2.5%)
Iceland	1 (1.4%)	7 (9.2%)	4 (2.2%)	14 (7.6%)
Norway	97 (10.5%)	140 (15.2%)	275 (8.7%)	446 (14.4%)
Switzerland	182 (18.8%)	187 (24.3%)	386 (14.2%)	627 (23.4%)
United Kingdom	168 (3.9%)	84 (3.0%)	314 (2.1%)	261 (2.2%)

Note: Sales shares are shown in parentheses.

MEDIUM TRUCKS AND VANS

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

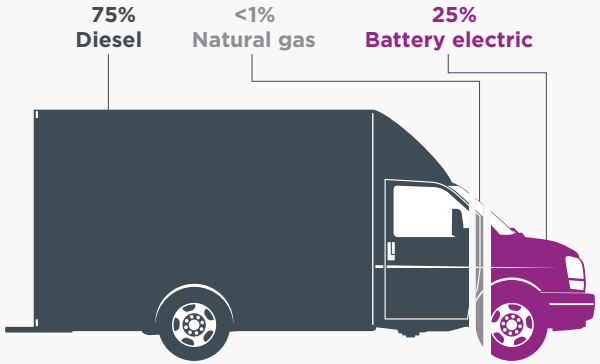
In Q1–Q3 2026, 37,000 medium trucks and vans were sold in the EU, of which 7,800 were ZE vehicles—a 21% share, up from 18% in Q1–Q3 2025.

After briefly stagnating in Q2, sales of ZE medium trucks and vans picked up pace in Q3, when they represented one in four new vehicles sold across the EU. Regional growth was driven largely by sales in Germany, which recorded 3,800 sales (a 27% ZE share), accounting for half of all ZE medium trucks and vans sold in the EU in Q1–Q3 2026. There has been no nationwide subsidy for the purchase of ZE commercial vehicles in Germany since 2024, but ZE medium trucks and vans can still benefit from a motor tax exemption until 2028 and a toll exemption until 2031. Meanwhile, Denmark overtook the Netherlands for the highest ZE share in this segment, at 80%. As in Germany, Denmark provides limited subsidies for these vehicles, indicating that purchases have been driven primarily by their competitive total cost of ownership compared to diesel.

Mercedes has benefited most from the surge in sales. Sales of its electric eSprinter van more than doubled in Q1–Q3 2026 compared to the same period in 2025. In Q1–Q3 2026, roughly 4 out of 10 new ZE medium trucks and vans were eSprinters, 2 out of 10 were Ford E-Transits, and 1 out of 10 were Iveco eDailys.

Figure 3.1

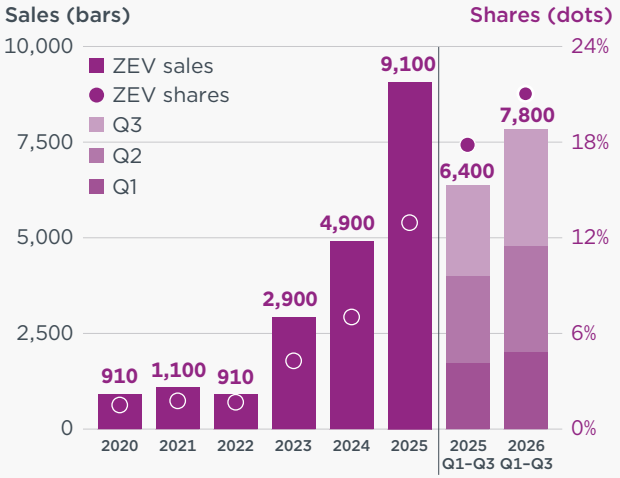
Sales of medium trucks and vans by powertrain, Q3 2026



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Figure 3.2

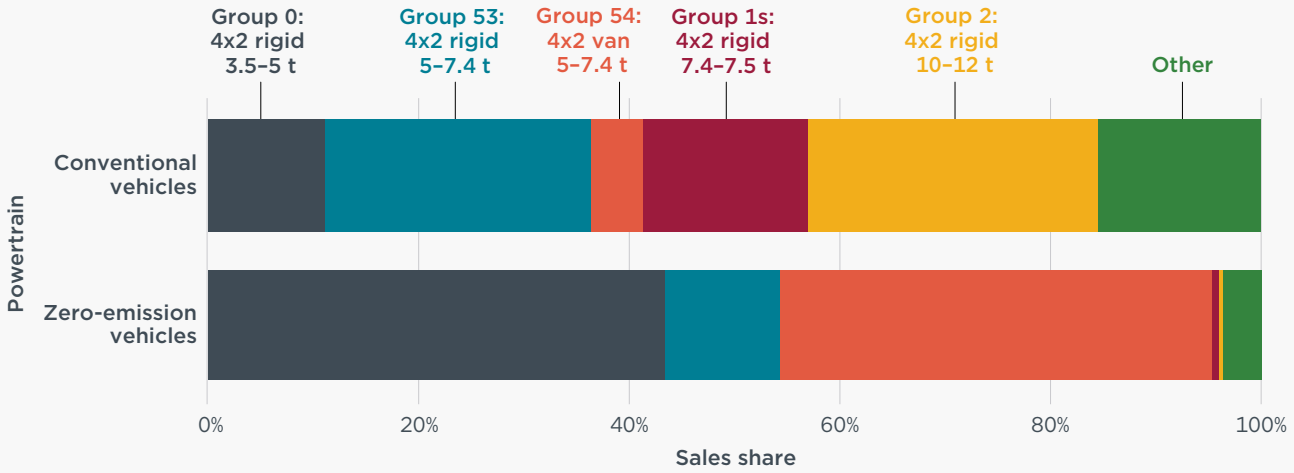
Historic sales of zero-emission medium trucks and vans



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Figure 3.3

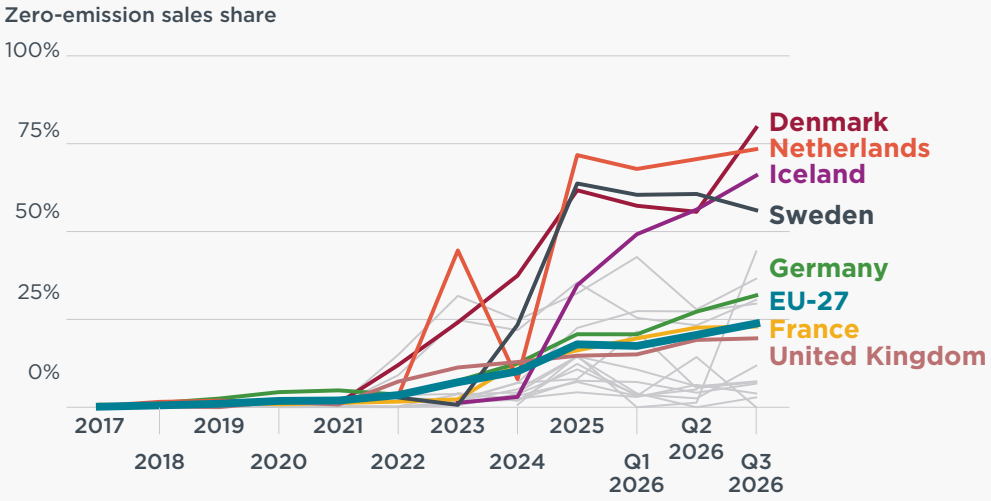
Sales of medium trucks and vans by VECTO group and powertrain, Q1–Q3 2026



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Figure 3.4

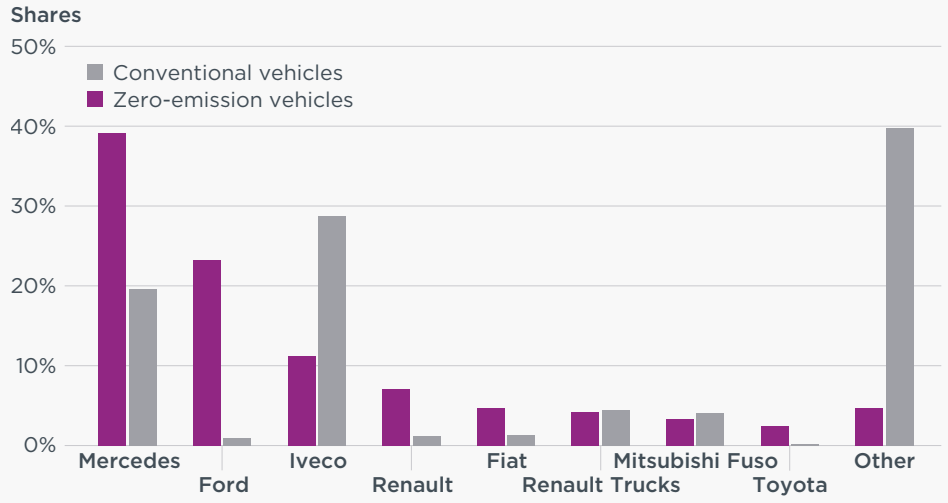
Sales shares of zero-emission medium trucks and vans in select countries



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Figure 3.5

Sales shares of medium trucks and vans by powertrain and manufacturer, Q1–Q3 2026



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Table 2

Sales of zero-emission medium trucks and vans by EU Member State

Country	Q3 2025	Q3 2026	Q1–Q3 2025	Q1–Q3 2026
Austria	36 (22.4%)	28 (29.5%)	86 (20.1%)	93 (27.9%)
Belgium	26 (9.3%)	28 (11.8%)	104 (10.8%)	44 (5.8%)
Croatia	0 (0.0%)	4 (4.9%)	2 (1.2%)	4 (2.4%)
Cyprus	0 (0.0%)	0 (0.0%)	0 (0.0%)	1 (3.1%)
Czechia	18 (6.6%)	30 (10.5%)	63 (7.5%)	81 (10.0%)
Denmark	97 (67.4%)	167 (79.5%)	304 (60.0%)	343 (65.7%)
Estonia	0 (0.0%)	1 (7.1%)	0 (0.0%)	1 (2.5%)
Finland	11 (7.2%)	–	22 (5.7%)	–
France	187 (12.8%)	318 (23.0%)	586 (12.2%)	993 (21.7%)
Germany	1,402 (26.0%)	1,567 (31.8%)	2,934 (20.9%)	3,809 (26.9%)
Greece	14 (15.4%)	94 (44.3%)	43 (14.0%)	95 (25.8%)
Hungary	5 (5.2%)	8 (12.3%)	18 (8.1%)	18 (6.7%)
Ireland	21 (12.1%)	4 (2.8%)	46 (9.6%)	9 (2.3%)
Italy	97 (13.0%)	48 (7.4%)	460 (17.3%)	199 (8.1%)
Latvia	1 (16.7%)	0 (0.0%)	2 (7.1%)	0 (0.0%)
Lithuania	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)
Luxembourg	5 (21.7%)	0 (0.0%)	10 (16.9%)	3 (4.5%)
Netherlands	183 (59.6%)	487 (73.5%)	847 (71.7%)	1,193 (71.0%)
Poland	12 (2.8%)	45 (6.5%)	31 (2.3%)	101 (5.2%)
Portugal	14 (9.0%)	10 (7.1%)	31 (7.2%)	66 (13.3%)
Romania	59 (33.1%)	5 (3.2%)	141 (29.4%)	28 (7.5%)
Slovakia	12 (16.9%)	4 (4.3%)	16 (7.0%)	7 (2.6%)
Slovenia	2 (6.9%)	0 (0.0%)	2 (2.5%)	0 (0.0%)
Spain	46 (2.8%)	69 (3.9%)	211 (3.7%)	279 (4.4%)
Sweden	130 (64.0%)	120 (56.1%)	422 (63.8%)	446 (59.3%)
EU-27	2,378 (19.6%)	3,037 (25.1%)	6,381 (17.7%)	7,826 (21.0%)
Iceland	8 (27.6%)	31 (66.0%)	14 (20.0%)	99 (56.2%)
Norway	69 (20.4%)	154 (36.6%)	218 (23.6%)	444 (35.8%)
Switzerland	95 (29.8%)	99 (30.6%)	249 (28.3%)	243 (26.5%)
United Kingdom	887 (19.8%)	1,170 (19.6%)	1,916 (14.6%)	2,974 (18.1%)

Note: Sales shares are shown in parentheses.

BUSES AND COACHES

WITH A GROSS VEHICLE WEIGHT ABOVE 3.5 TONNES

In Q1–Q3 2026, 33,200 buses and coaches were sold in the EU, of which 9,200 were zero-emission vehicles—a 28% share, up from 23% in Q1–Q3 2025.

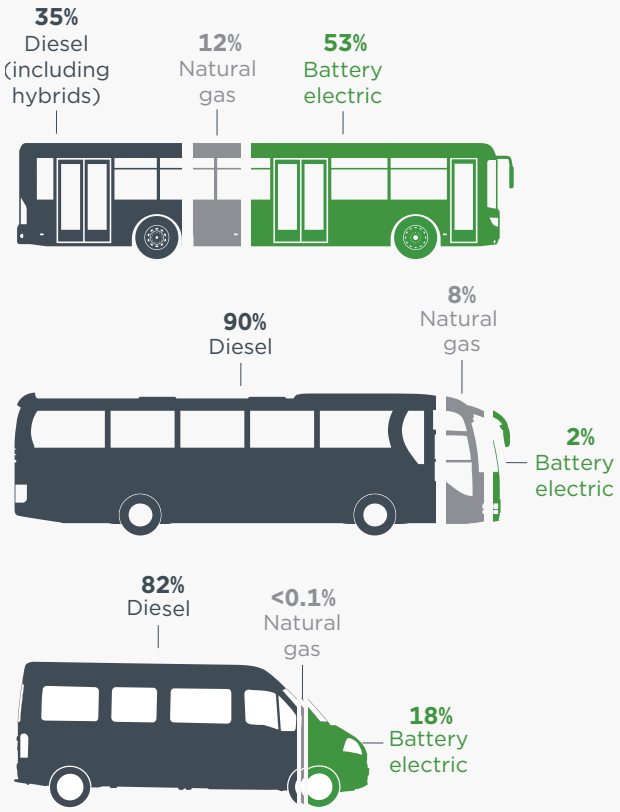
Sales of electric city buses dipped slightly in Q3 2026, to 53%, compared to 60% in Q2 2026. The decline was driven mostly by a one-time surge in sales of electric buses in Italy in the previous quarter linked to the country's use of the Recovery and Resilience Facility, which was required to be used by August 2026. Sales of electric interurban buses and coaches fell significantly from 250 sales in Q2 2026 (5% share) to 82 sales in Q3 2026 (2%).

Yutong was the second largest provider of ZE buses and coaches in Q1–Q3 2026 following delivery of 125 electric city buses to Greece. This procurement was the result of a tender issued by the Greek Ministry of Infrastructure and Transport for 125 buses to be added to the Athens urban transportation network, also funded through the Recovery and Resilience Facility.[3]

Five EU-27 countries have only recorded electric city bus sales so far this year: Slovenia, Romania, the Netherlands, Finland, and Denmark. Outside of the EU-27, Norway and Iceland also had 100% ZE city bus sales.

Figure 4.1

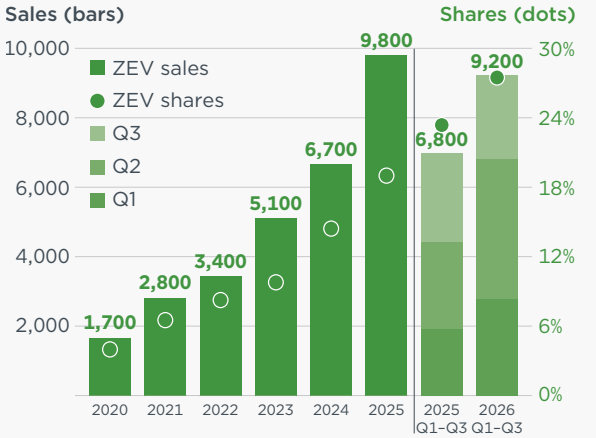
Sales of city buses (top), inter-urban buses and coaches (middle), and minibuses (bottom) by powertrain, Q3 2026



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Figure 4.2

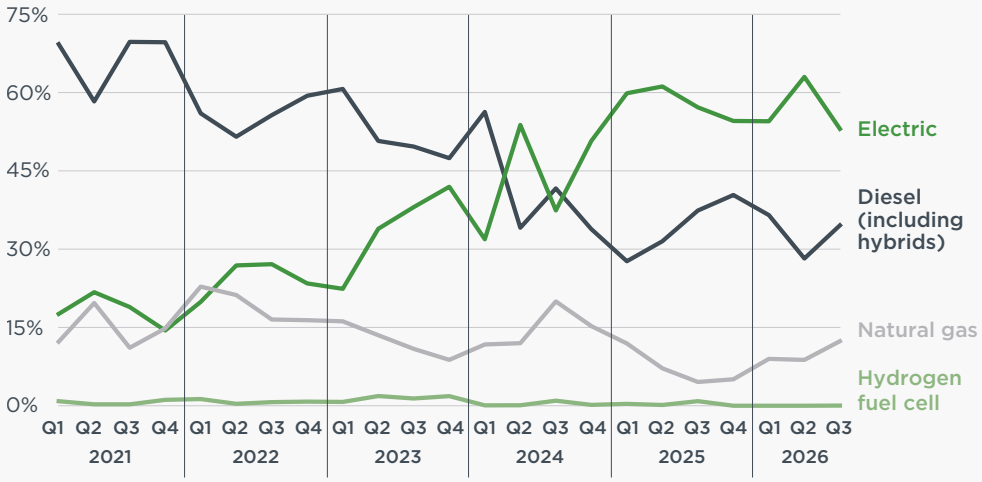
Historic sales of zero-emission buses and coaches



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Figure 4.3

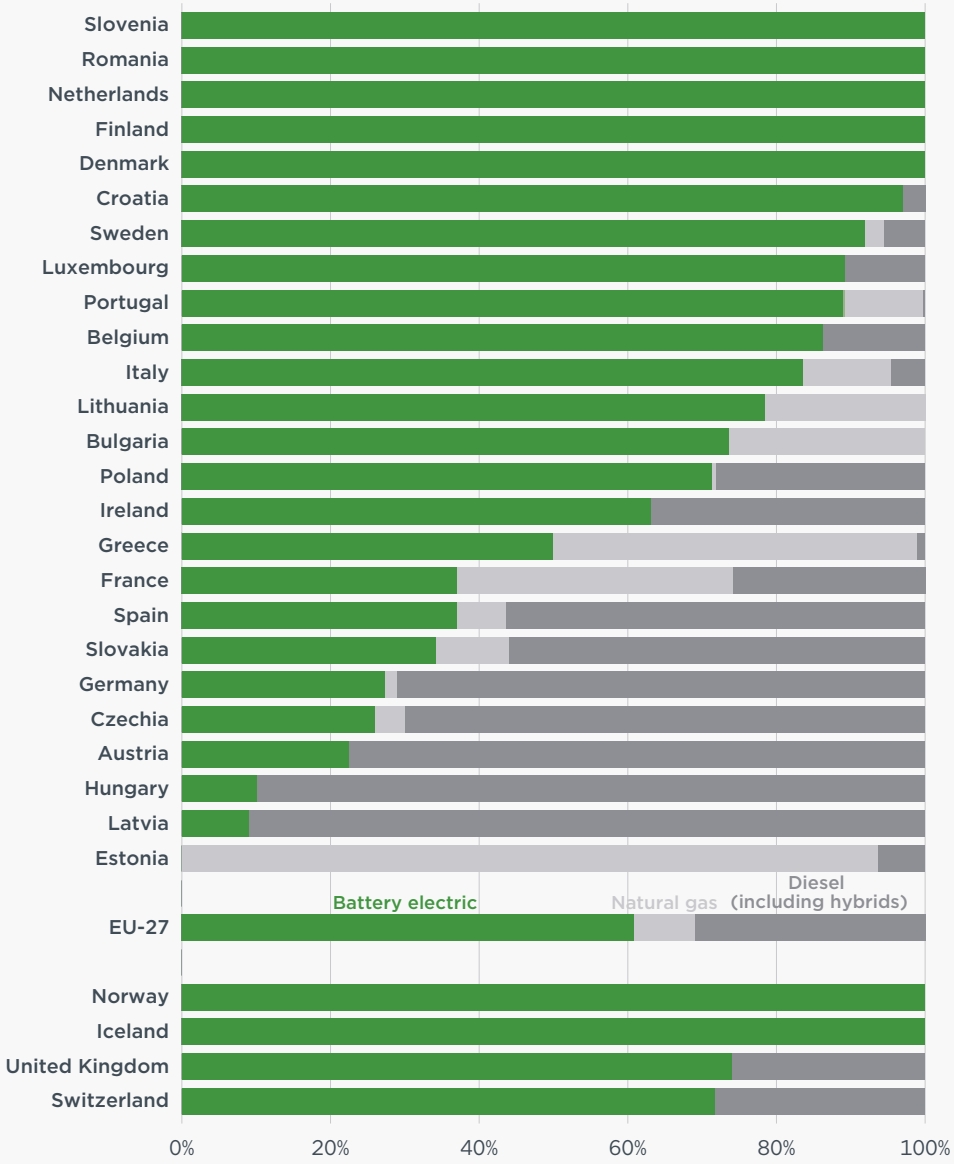
Sales of city buses by powertrain



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Figure 4.4

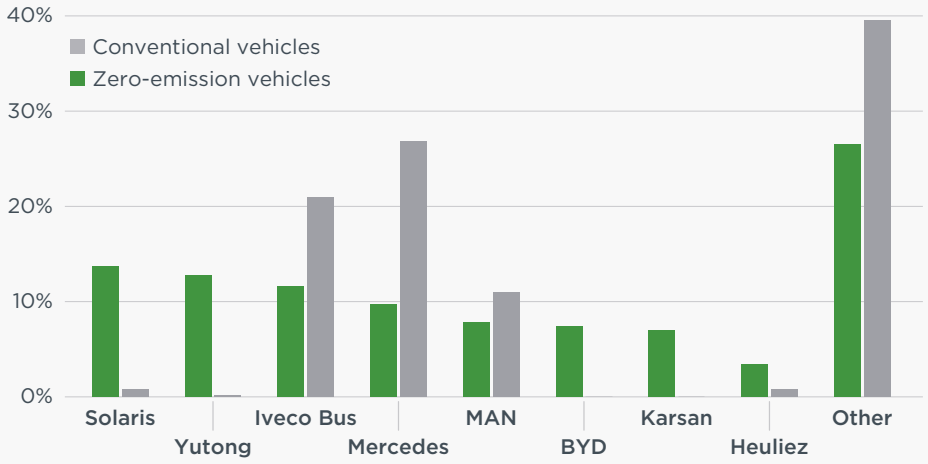
Sales shares of city buses by powertrain and Member State, Q1–Q3 2026



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Figure 4.5

Sales shares of buses by powertrain and manufacturer, Q1–Q3 2026



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Table 3

Sales of zero-emission buses and coaches by EU Member State

Country	Q3 2025	Q3 2026	Q1–Q3 2025	Q1–Q3 2026
Austria	51 (18.9%)	5 (1.9%)	112 (14.2%)	173 (16.9%)
Belgium	137 (32.0%)	49 (16.0%)	660 (51.9%)	189 (20.5%)
Bulgaria	0 (0.0%)	8 (20.5%)	0 (0.0%)	22 (11.6%)
Croatia	3 (3.5%)	96 (51.6%)	9 (3.5%)	108 (28.3%)
Cyprus	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)
Czechia	7 (4.4%)	11 (4.8%)	19 (3.2%)	46 (6.2%)
Denmark	126 (79.7%)	114 (72.6%)	300 (69.4%)	328 (64.1%)
Estonia	0 (0.0%)	22 (52.4%)	0 (0.0%)	40 (29.9%)
Finland	62 (68.1%)	–	120 (64.5%)	–
France	241 (12.7%)	276 (14.7%)	545 (11.9%)	715 (13.5%)
Germany	380 (22.2%)	268 (17.3%)	1,215 (25.8%)	858 (16.4%)
Greece	6 (3.8%)	194 (73.5%)	112 (20.1%)	210 (34.8%)
Hungary	22 (16.4%)	5 (4.0%)	34 (7.4%)	50 (8.4%)
Ireland	0 (0.0%)	34 (16.7%)	18 (2.2%)	69 (8.6%)
Italy	423 (37.2%)	161 (16.3%)	850 (22.9%)	2,053 (40.3%)
Latvia	5 (11.6%)	8 (33.3%)	36 (37.5%)	12 (14.0%)
Lithuania	41 (51.2%)	9 (13.2%)	138 (39.7%)	175 (49.3%)
Luxembourg	11 (40.7%)	53 (56.4%)	61 (34.3%)	100 (41.7%)
Netherlands	136 (64.8%)	252 (89.4%)	421 (60.7%)	783 (74.9%)
Poland	55 (10.4%)	267 (34.7%)	153 (10.2%)	935 (36.9%)
Portugal	25 (11.9%)	120 (47.1%)	55 (7.0%)	569 (53.4%)
Romania	437 (61.3%)	240 (56.2%)	970 (52.8%)	862 (56.8%)
Slovakia	0 (0.0%)	35 (21.3%)	0 (0.0%)	55 (19.1%)
Slovenia	6 (6.0%)	21 (36.2%)	7 (3.0%)	61 (27.0%)
Spain	100 (8.9%)	71 (5.5%)	272 (8.3%)	287 (8.7%)
Sweden	238 (38.4%)	72 (39.3%)	700 (45.1%)	425 (48.4%)
EU-27	2,512 (24.5%)	2,391 (24.2%)	6,807 (23.2%)	9,217 (27.7%)
Iceland	2 (6.1%)	17 (28.8%)	8 (5.2%)	39 (24.1%)
Norway	63 (32.6%)	104 (40.8%)	599 (60.0%)	785 (59.0%)
Switzerland	88 (52.4%)	105 (53.0%)	166 (41.3%)	230 (43.6%)
United Kingdom	697 (52.0%)	384 (47.5%)	2,228 (50.8%)	1,591 (48.5%)

Note: Sales shares are shown in parentheses.

DEFINITIONS, DATA SOURCES, METHODOLOGY, AND ASSUMPTIONS

A **zero-emission vehicle** is any vehicle whose propulsion system produces zero combustion emissions, including vehicles with 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 used exclusively in urban environments with a gross vehicle weight above 7.5 tonnes.

An **inter-urban 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 used exclusively in regional environments with a gross vehicle weight above 3.5 tonnes.

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

Data for EU-27 Member States, Iceland, Norway, and Switzerland were supplied by Dataforce. Data for the UK supplied by Mobility Global. Malta is not included for any year or quarter. Data for Finland are not included in Q3 2026. Figures only cover EU-27 countries with the exception of Figures 2.4 and 3.4, which also include the UK, Norway, Switzerland, and Iceland.

ENDNOTES

1 Aimee Look, "Tata Motors Clears Key Hurdle in Iveco Takeover as Shareholders Back Buyout," *Wall Street Journal*, October 27, 2026, https://www.wsj.com/business/deals/tata-motors-clears-key-hurdle-in-iveco-takeover-as-shareholders-back-buyout-807f59ac.

2 Ministère des Finances, "Électrifions la France ! Pour Une Énergie Moins Chère, Plus Souveraine et Plus Durable," press kit, April 23, 2026, https://presse.economie.gouv.fr/electrifions-la-france-pour-une-energie-moins-chere-plus-souveraine-et-plus-durable/.

3 Sustainable Bus, "125 Electric Buses up for Grabs in Greece: New Tender's Out, Funded by EU," February 11, 2025, https://www.sustainable-bus.com/electric-bus/greece-tender-125-electric-buses/.

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