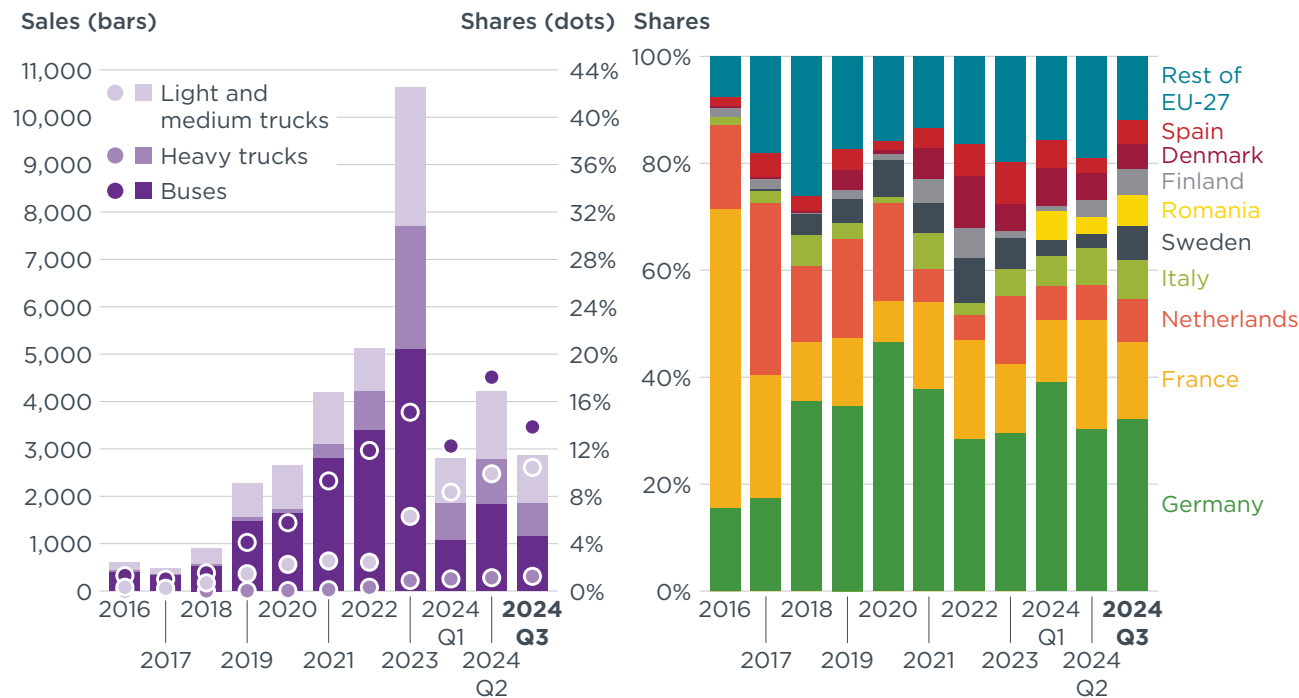


# EUROPEAN HEAVY DUTY VEHICLE MARKET DEVELOPMENT QUARTERLY (JANUARY - SEPTEMBER 2024)

EAMONN MULHOLLAND, PIERRE-LOUIS RAGON



## SUMMARY

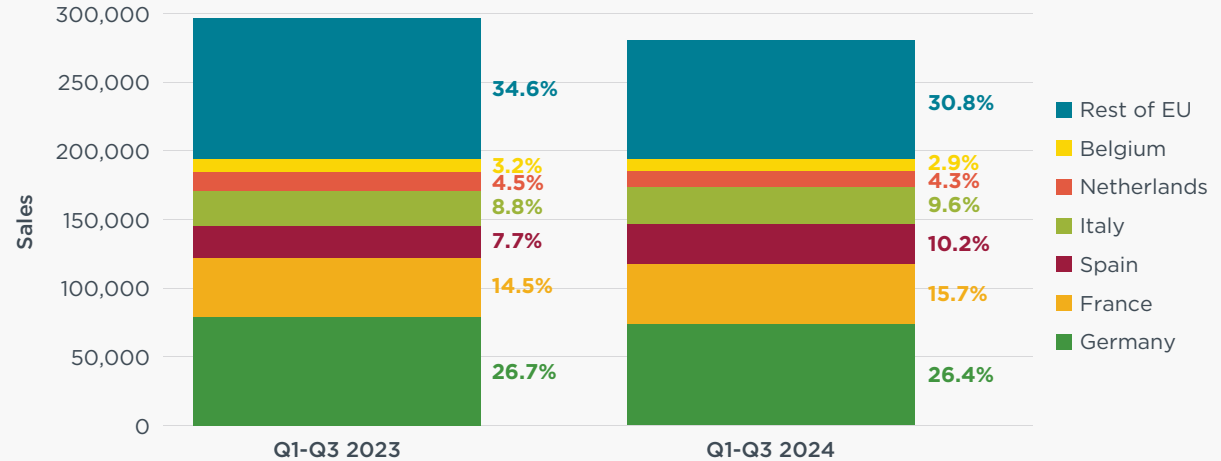
Just under 2,900 zero-emission heavy-duty vehicles (HDVs) were sold in the third quarter of 2024: 700 heavy trucks (above 12 tonnes), 1,000 light and medium trucks (below 12 tonnes), and 1,200 buses. Sales of zero-emission HDVs fell from 4,200 in the preceding quarter amid a contraction in the broader HDV market, which saw sales of 74,000 in Q3, down from 110,000 in Q2. This left the sales share of zero-emission HDVs mostly unchanged at 4.0% in Q3 compared with 4.1% in Q2 2024. At the same time, the sales share of zero-emission heavy trucks rose from 1.1% in Q2 to 1.2% in Q3, the share of zero-emission light and medium trucks rose from 9.9% to 10.4%, and the share of zero-emission buses shrunk from 18% to 14%. The drop in zero-emission bus sales was driven in part by contractions in major markets including Germany (where sales dropped by a third) and France (dropped by two-thirds), and in part due to unusually high sales of zero-emission buses in smaller Member States in Q2 2024. Although Ireland, Greece, and Denmark made up 30% of zero-emission bus sales in Q2, the same three countries were just 4% of zero-emission bus sales in Q3 2024.

## OVERALL MARKET DEVELOPMENTS

The drop in HDV sales in the EU-27 from 110,000 in Q2 2024, which was the highest quarterly sales total since these market monitors began last year, to 74,000 in Q3, which was the lowest sales of any quarter in the past 2 years, marked a 32% decline. By contrast, sales marginally increased by 1.6% over the same period in 2023. The 2024 decrease in sales was notably high in major markets, as truck sales in Germany dropped by 40% and in Italy by 38%.

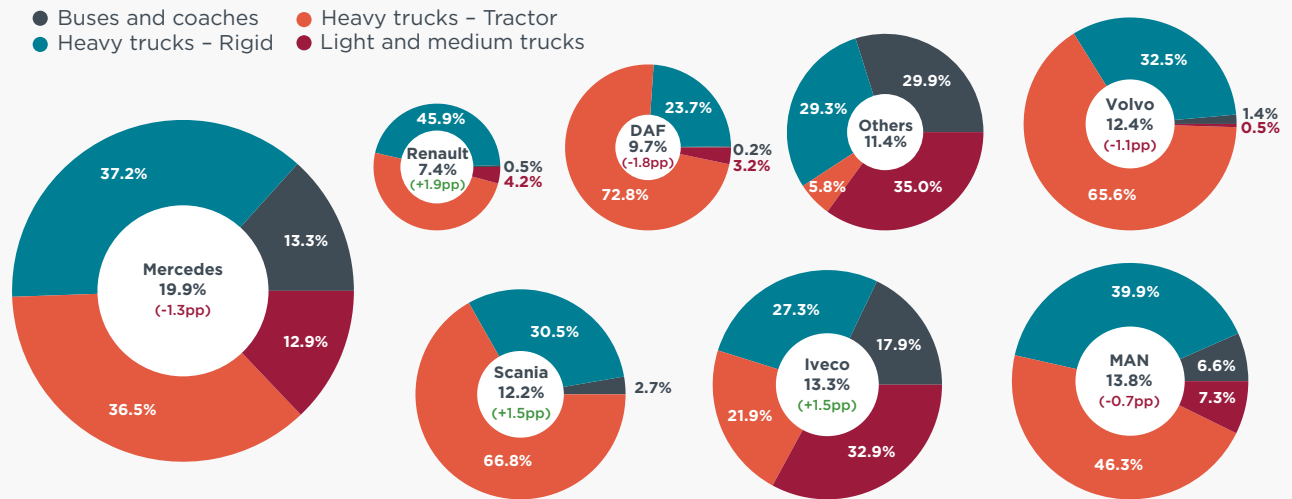
Volvo Trucks was least affected by the market contraction, as its sales fell by 19% in Q3 compared with Q2. It was followed by Renault Trucks and MAN, which both contracted by 26%. Sales of Scania HDVs fell by the most of any major manufacturer from Q2 to Q3, 40%, and it was followed by Iveco (38%) and Mercedes (35%). Despite these contractions, the market share of the major manufacturers remained mostly unchanged. Mercedes is the top seller so far this year (20% of all HDVs) followed by MAN (14%), Iveco (13%), Volvo Trucks (12%), Scania (12%), DAF (10%), and Renault Trucks (7%).

**FIGURE 1.1**  
Full market share by country



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**FIGURE 1.2**  
Manufacturer market share by segment from Q1-Q3 2024



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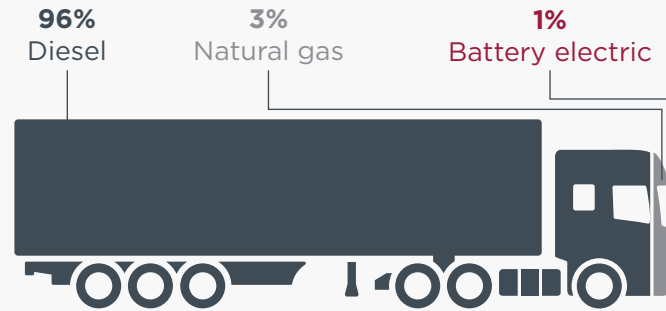
## HEAVY TRUCKS

### TRUCKS WITH A GROSS VEHICLE WEIGHT ABOVE 12 TONNES

In Q3 2024, heavy trucks were 75% of all HDV sales. Out of 56,000 heavy trucks sold, 700 (1.2%) were zero-emission vehicles. While sales of zero-emission heavy trucks fell by 25% in Q3 compared with Q2, this came against the backdrop of an overall contraction in the market for all heavy trucks, which fell from 83,000 vehicles in Q2 to 56,000 in Q3, a 32% decrease. As such, the share of zero-emission heavy trucks rose from 1.1% in Q2 to 1.2% in Q3. Compared with the first three quarters of 2023, zero-emission heavy truck sales increased by 42% in the first three quarters of 2024; the 2,400 vehicles registered (1.2% of total heavy truck sales) were more than the 1,700 vehicles (0.8%) registered in the first three quarters of 2023.

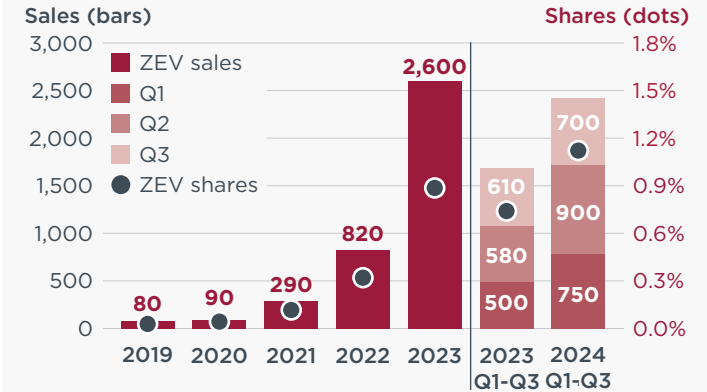
Volvo Trucks maintained its leading position in the zero-emission heavy truck market in Q3 2024, and its 36% share was a drop from its 43.5% share in Q2 2024. Renault trailed closely by selling 32% of all zero-emission heavy trucks and was followed by Mercedes with a 13% share. Germany continued to lead in sales of zero-emission heavy trucks with 250 units sold, 36% of the market. Just five countries (Germany, France, Netherlands, Sweden, and Denmark) were home to 86% of all zero-emission heavy truck sales.

**FIGURE 2.1**  
Sales of heavy trucks by powertrain in Q3 2024



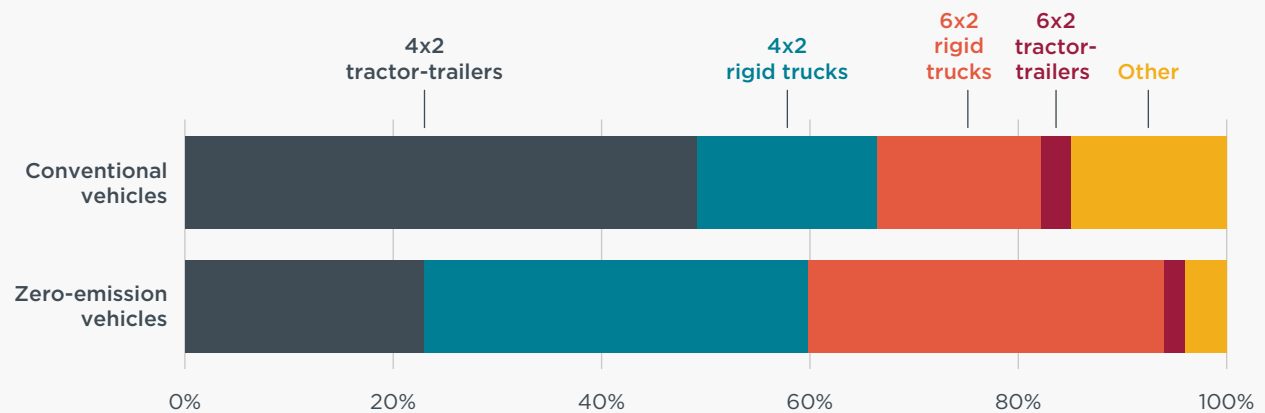
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**FIGURE 2.2**  
Sales of zero-emission heavy trucks



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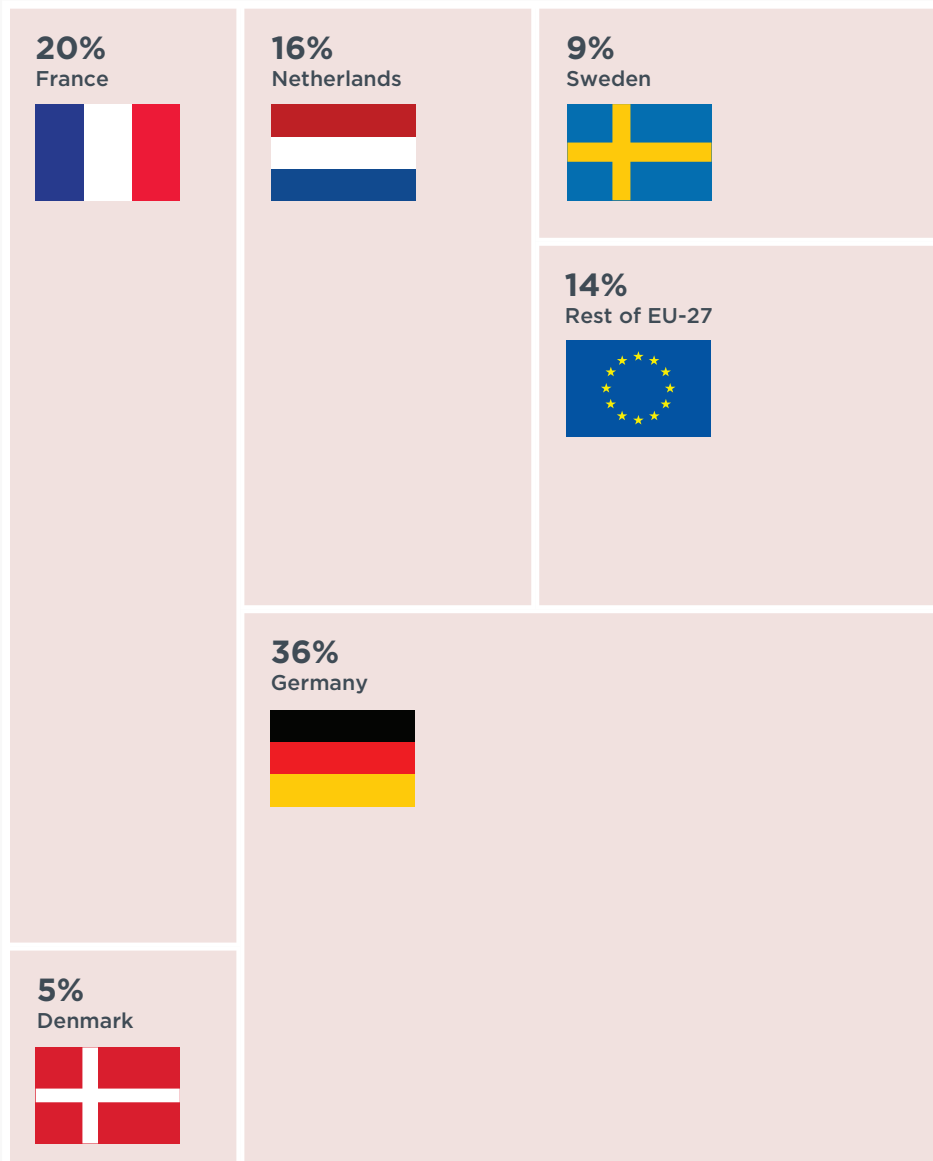
**FIGURE 2.3**  
Sales of zero-emission heavy trucks by configuration and powertrain in Q3 2024



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**FIGURE 2.4**

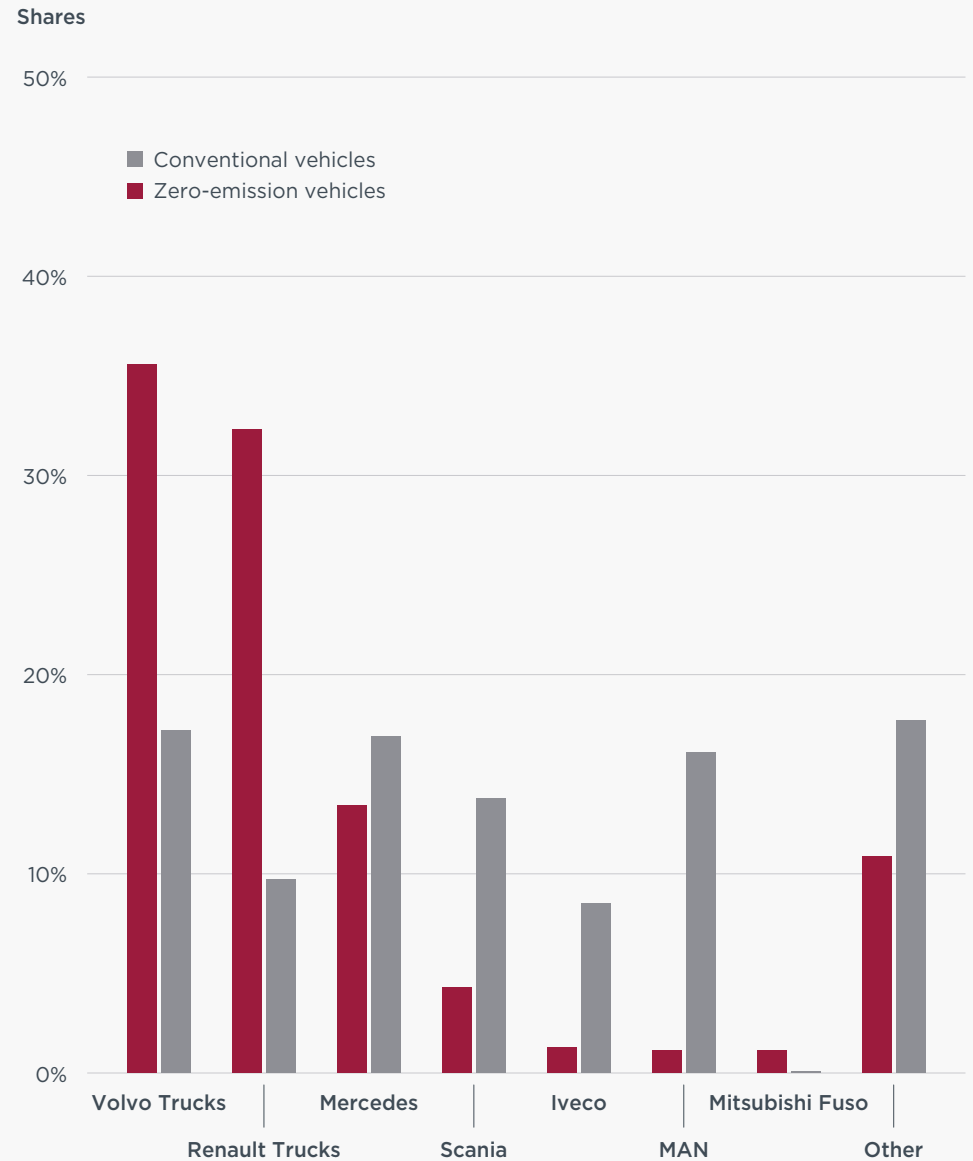
**Sales of zero-emission heavy trucks by Member State in Q3 2024**



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**FIGURE 2.5**

**Shares of heavy trucks by powertrain and manufacturer in Q3 2024**



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**TABLE 1**

**Zero-emission heavy trucks market share and growth rates across selected countries**

Country	Q3 2024 ZEV sales	ZEV sales share in Q3 2024	Quarterly ZEV growth rate in 2024 (Q3 relative to Q2)	Year-over-year ZEV growth rate (Q1-Q3 2024 relative to Q1-Q3 2023)
Austria	33	2.3%	-23%	335%
Belgium	21	1.2%	-16%	131%
Denmark	34	4.9%	-35%	-13%
Finland	6	1.0%	-25%	-28%
France	142	1.6%	-5%	38%
Germany	252	1.8%	-25%	92%
Italy	4	0.1%	-60%	17%
Netherlands	113	4.3%	-28%	39%
Spain	21	0.4%	-30%	-26%
Sweden	63	6.1%	-40%	-24%
Rest of EU	17	0.1%	-23%	23%
EU-27	700	1.2%	-24%	43%

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## LIGHT AND MEDIUM TRUCKS

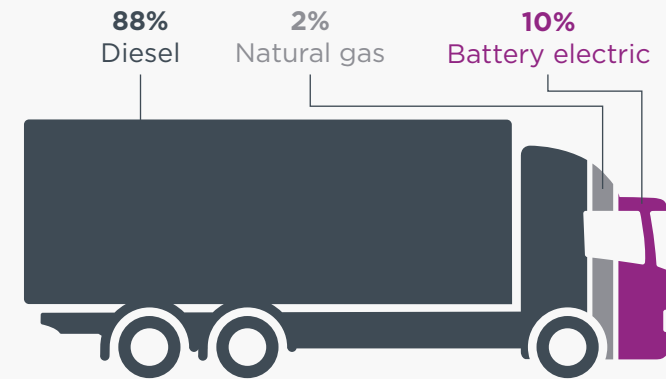
### TRUCKS WITH A GROSS VEHICLE WEIGHT BETWEEN 3.5 TONNES AND 12 TONNES

In the third quarter of 2024, light and medium trucks were 12% of all HDV sales. Of the 9,500 light and medium trucks sold, 1,000 were zero-emission vehicles, 10.4%. This marked a slight sales share increase over the second quarter of 2024, when 1,400, or 9.9%, of the trucks sold were zero-emission, and was achieved in spite of a contraction in total sales of all trucks over the same period.

Compared with the first three quarters of 2023, zero-emission light and medium truck sales increased by 47% in the first three quarters of 2024, and the 3,400 vehicles registered (10% of total light and medium truck sales in this period) were up from 2,300 vehicles (7%) year-over-year.

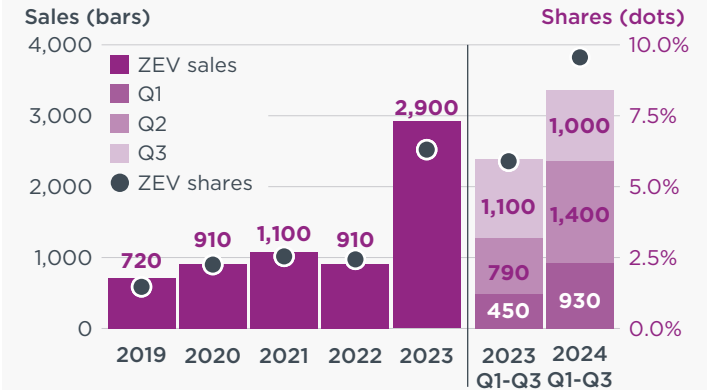
For the first time since we commenced these market monitors last year, Ford dropped from its position as the top seller of zero-emission light and medium trucks. Though Ford's E-Transit has long been the dominant model in the zero-emission market in this segment, its sales fell to 230 (23% of all sales) in Q3 2024 from 600 in Q2 2024, and the eDaily by Iveco became the top-selling model, with 400 sold in Q3 2024, or 40% of all sales.

**FIGURE 3.1**  
Sales of light and medium trucks by powertrain in Q3 2024



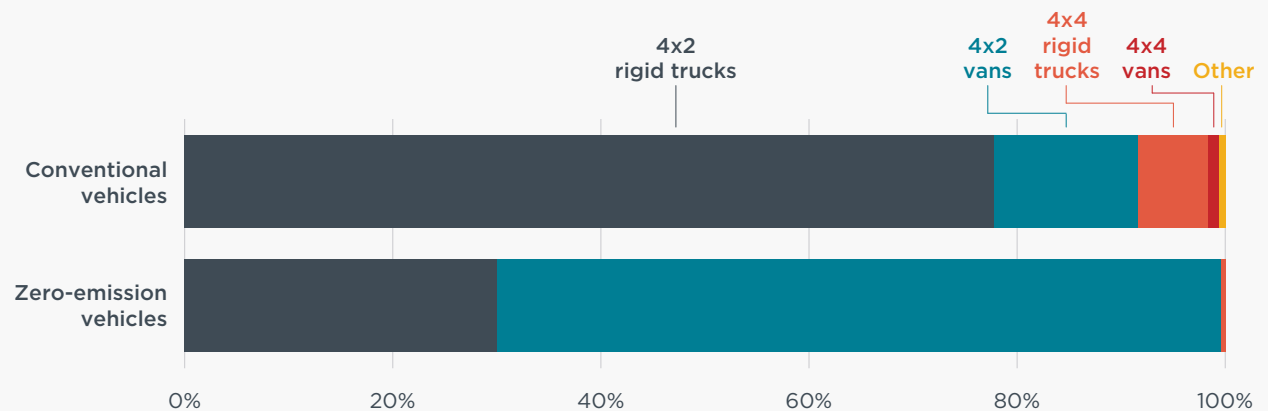
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**FIGURE 3.2**  
Historic sales of battery electric light and medium trucks



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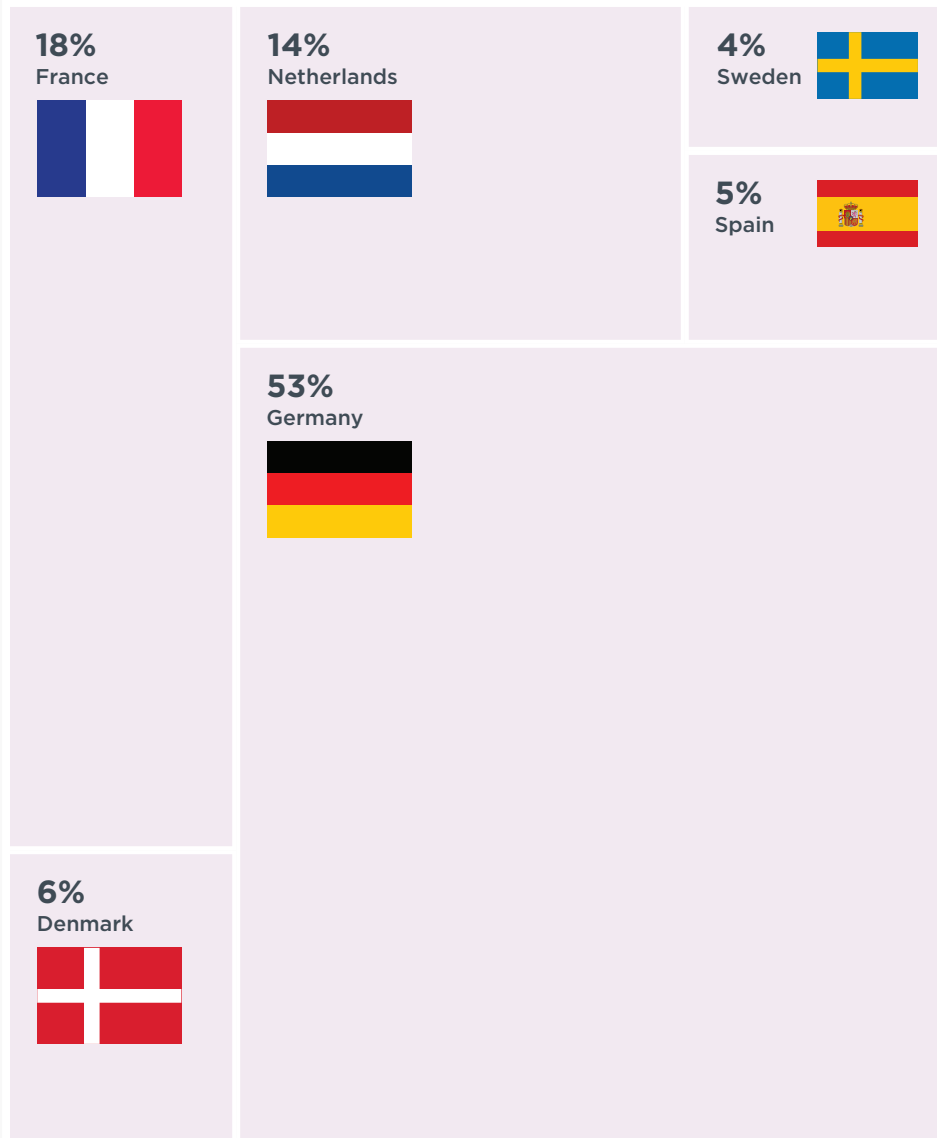
**FIGURE 3.3**  
Sales of zero-emission light and medium trucks by configuration and powertrain



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**FIGURE 3.4**

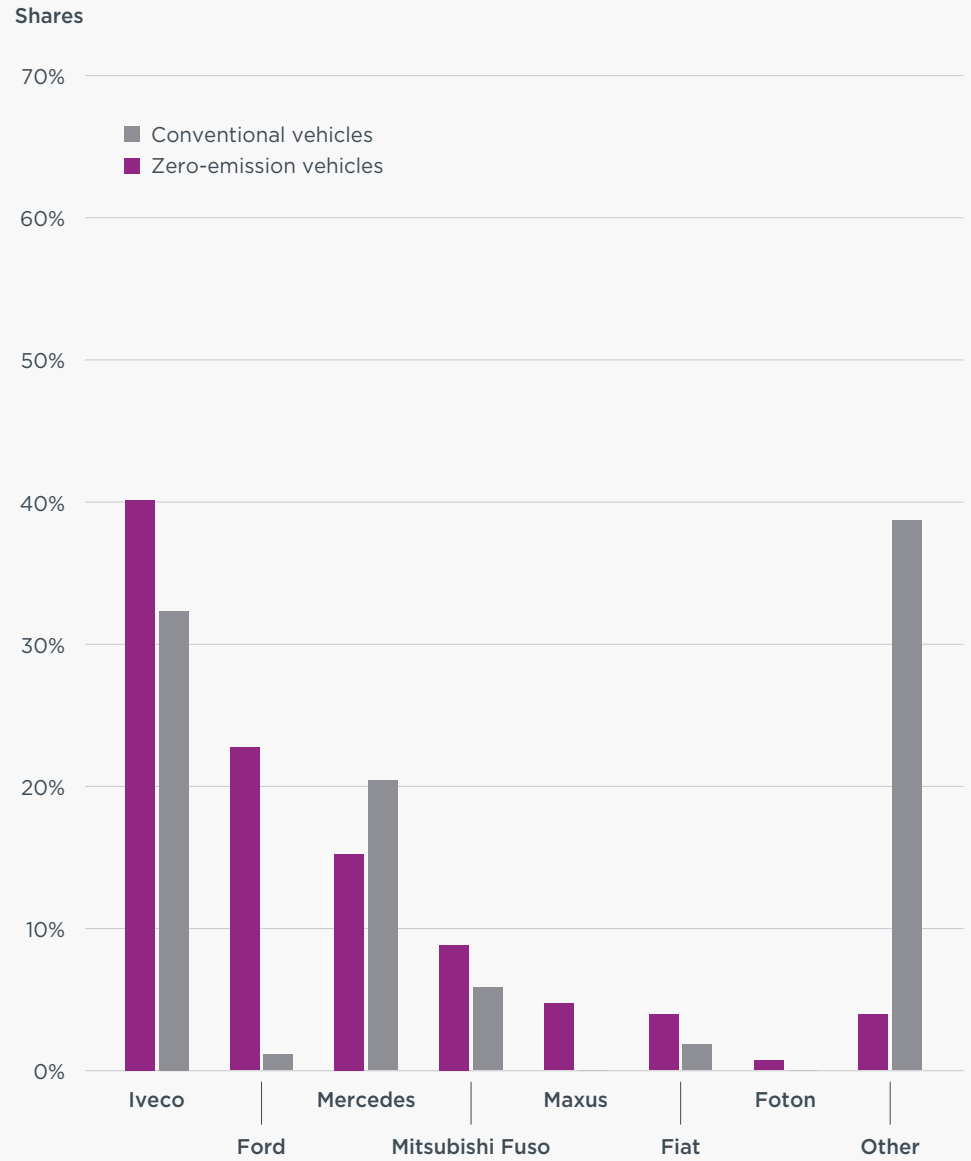
**Sales of zero-emission light and medium commercial vehicles by Member State in Q3 2024**



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**FIGURE 3.5**

**Shares of light and medium trucks by powertrain and manufacturer in Q3 2024**



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**TABLE 2**

**Zero-emission light and medium market share and growth rates across selected countries**

Country	Q3 2024 ZEV Sales	ZEV sales share in Q3 2024	Quarterly ZEV growth rate in 2024 (Q3 relative to Q2)	Year-over-year ZEV growth rate (Q1-Q3 2024 relative to Q1-Q3 2023)
Austria	15	13%	-6%	-3%
Belgium	6	2%	-71%	300%
Denmark	64	48%	42%	60%
Finland	2	2%	-33%	167%
France	183	14%	-56%	750%
Germany	527	16%	-28%	72%
Italy	34	6%	-45%	640%
Netherlands	36	9%	-23%	-86%
Spain	37	3%	-10%	24%
Sweden	49	33%	363%	4,500%
Rest of EU	47	3%	32%	58%
<b>EU-27</b>	<b>1,000</b>	<b>10%</b>	<b>-30%</b>	<b>47%</b>

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## BUSES AND COACHES

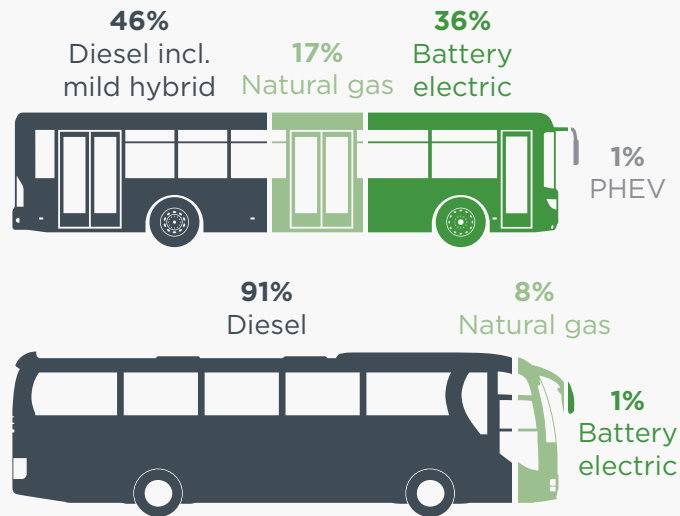
### WITH A GROSS VEHICLE WEIGHT ABOVE 3.5 TONNES

Buses and interurban coaches were 11% of all heavy-duty vehicle sales in the third quarter of 2024. Of the 8,400 buses sold, 1,200 were zero-emission vehicles, 14% of total sales; this is a drop from the second quarter share of 17%, but still above the first quarter share of 12%. Battery electric city buses were 36% of all city bus registrations, with 1,000 units registered in Q3 2024, and this was a drop from 40% in Q2 2024. Bus sales in the first three quarters of 2024 rose to 4,100, a 24% increase over the 3,300 buses sold in the first three quarters of 2023.

Mercedes became the top-selling manufacturer of zero-emission buses by selling 180 units in Q3 2024, 16% of all sales. Mercedes overtook Yutong, which was the highest selling manufacturer in the second quarter. Shares of plug-in hybrid electric buses increased, doubling from 15 vehicles sold in the second quarter to 32 vehicles in Q3 2024. Sales were almost entirely in Germany (there was only a single sale outside, in Italy), and most of the buses were Solaris's Urbino model.

FIGURE 4.1

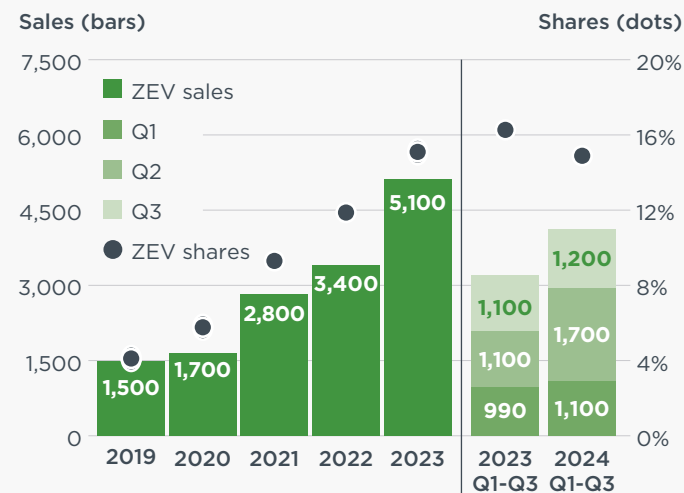
Sales of buses and coaches by powertrain in Q3 2024



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FIGURE 4.2

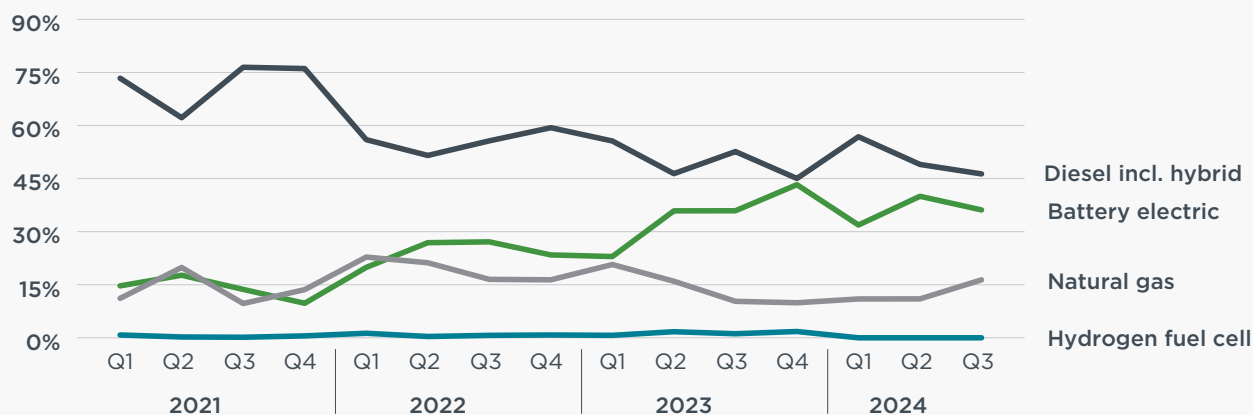
Historic sales of all zero-emission buses



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FIGURE 4.3

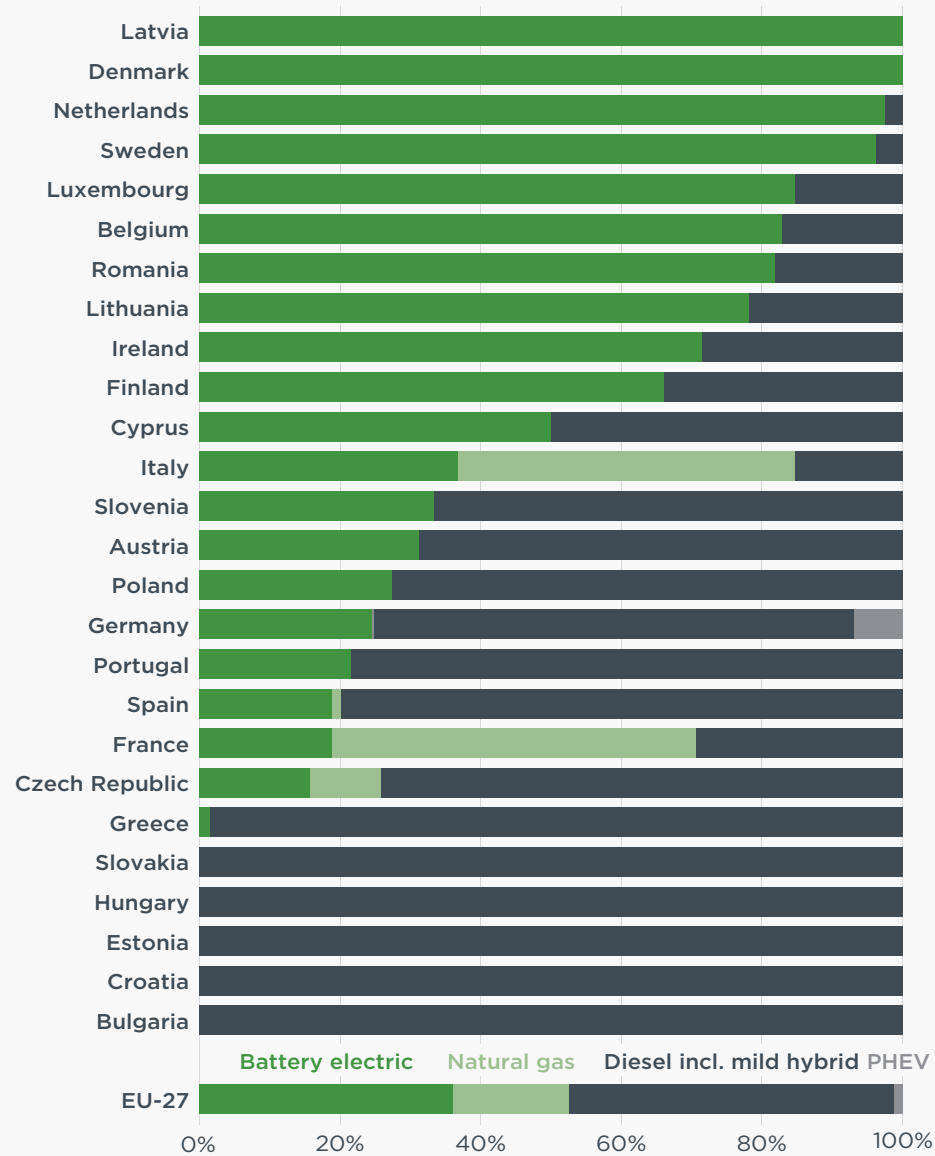
Historic sales shares of city buses by powertrain



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**FIGURE 4.4**

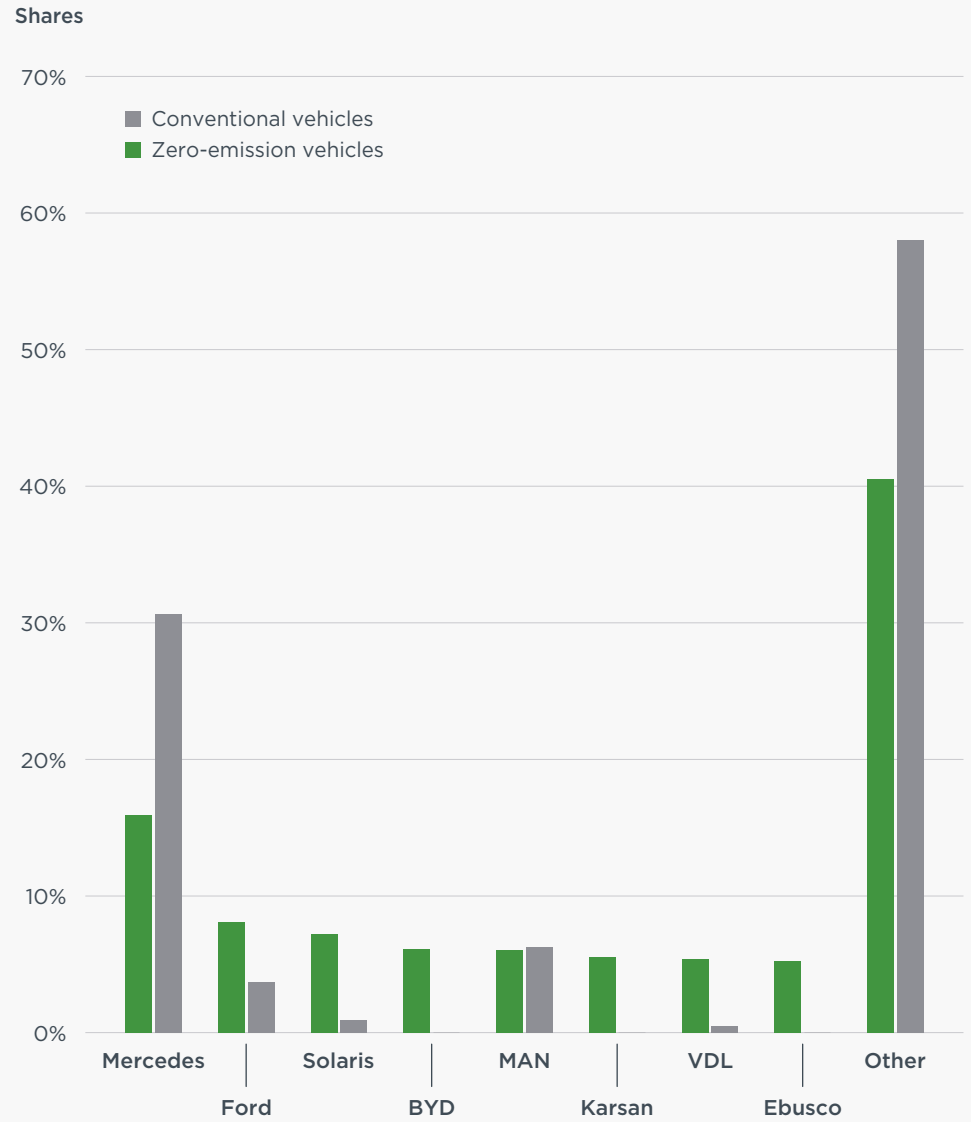
**Sales of city buses by Member State and powertrain**



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**FIGURE 4.5**

**Shares of all buses by powertrain and manufacturer in Q3 2024**



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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 light and medium commercial vehicle** is a truck or 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 3.5 tonnes that is used exclusively in urban environments.

**An interurban bus** is a passenger vehicle with a gross vehicle weight above 3.5 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.

All data are supplied by Dataforce. All countries from the EU-27, except Bulgaria, are covered here.

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