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

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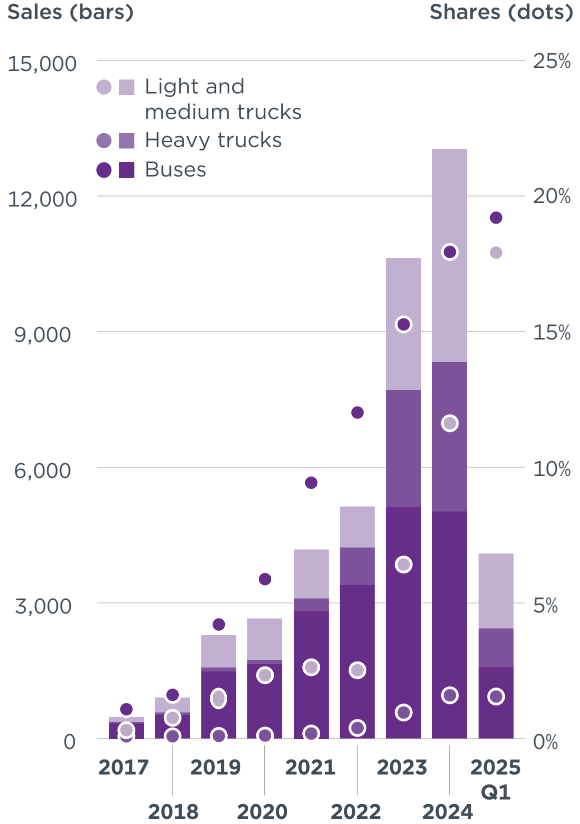

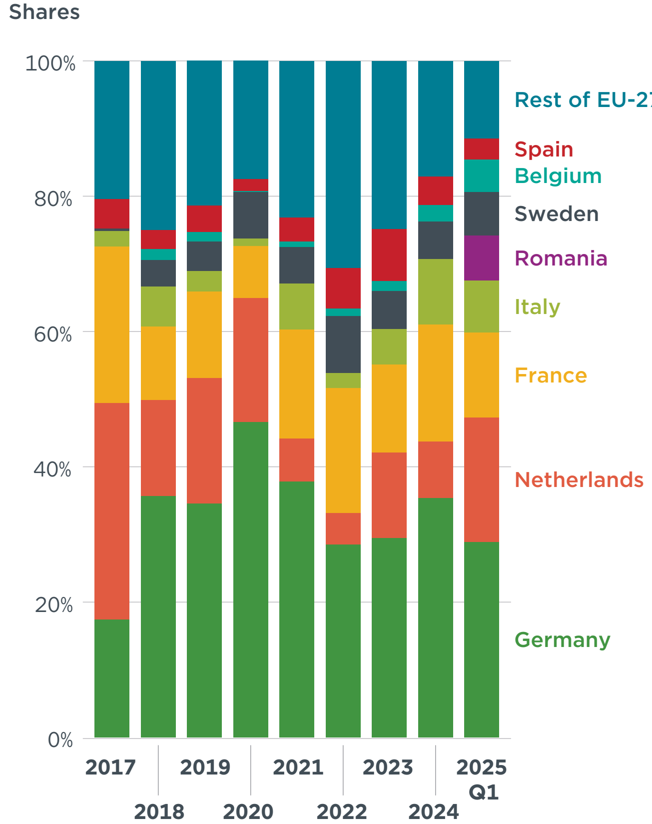

SUMMARY

The market for zero-emission heavy-duty vehicles (HDVs) took to a strong start in the first quarter (Q1) of 2025. While the overall market for HDVs fell by 20% compared with Q1 2024, sales of zero-emission HDVs rose to 4,100 vehicles, up 45% from the 2,800 vehicles sold in Q1 2024. Driving this was the growth in sales of light and medium trucks and, to a lesser extent, the bus and coach segments. The share of zero-emission vehicles among all light and medium trucks sold rose to an all-time high of 18% with 1,700 vehicles sold in Q1 2025; that was a doubling of both sales share and absolute sales from Q1 2024, when the sales share was 9% and 930 zero-emission vehicles were sold. Most of this increase was driven by sales in the Netherlands, where over 80% of light and medium trucks sold were electric.

Growth in the sales of zero-emission heavy trucks was less pronounced: The 850 vehicles sold were 1.5% of the market in Q1 2025, up marginally from 750 vehicles sold and a 1.0% sales share in Q1 2024. This was largely due to an increase in sales in France, where the sales share rose from 0.7% to 2.2% over the same period. Starting in July 2025, carbon dioxide reduction targets of 15% will apply to most new heavy trucks sold in the EU-27; it is possible that sales of zero-emission heavy trucks may increase in Q3 to comply. These targets will not apply to new light and medium trucks or to buses and coaches until 2030.

OVERALL MARKET DEVELOPMENTS

In Q1 2025, the HDV market contracted fairly significantly to 75,000 vehicles sold, down from 95,000 in Q1 2024. This continued an overall downward trajectory seen since the start of 2024. Sales fell in all but four countries—Bulgaria, Greece, Lithuania, and Portugal—and the steepest drop was in sales of heavy trucks (23% decrease compared with the first quarter of 2024), followed by light and medium trucks (16% decrease), and buses and coaches (7% decrease).

Daimler Truck was hit the hardest by this market contraction, with sales down 34% in Q1 2025 relative to Q1 2024, and it was followed by Scania (28% decrease) and MAN (27% decrease). Only Renault Trucks, the smallest of Europe's seven largest HDV manufacturers, saw an increase in its sales, which rose 2% compared with Q1 2024.

Despite these contractions, the market share of the major manufacturers remained mostly unchanged. Mercedes was the top seller in Q1 2025 (18% of all HDV sales) and was followed by Volvo and MAN (both 14%), Iveco (13%), Scania (12%), DAF (10%), and Renault (9%). Shares of manufacturers outside of the seven main manufacturers, which had been on an overall rise since the beginning of last year, fell to 13% in Q1 2025, down from 15% in Q4 2024.

Figure 1.1

Market share by country

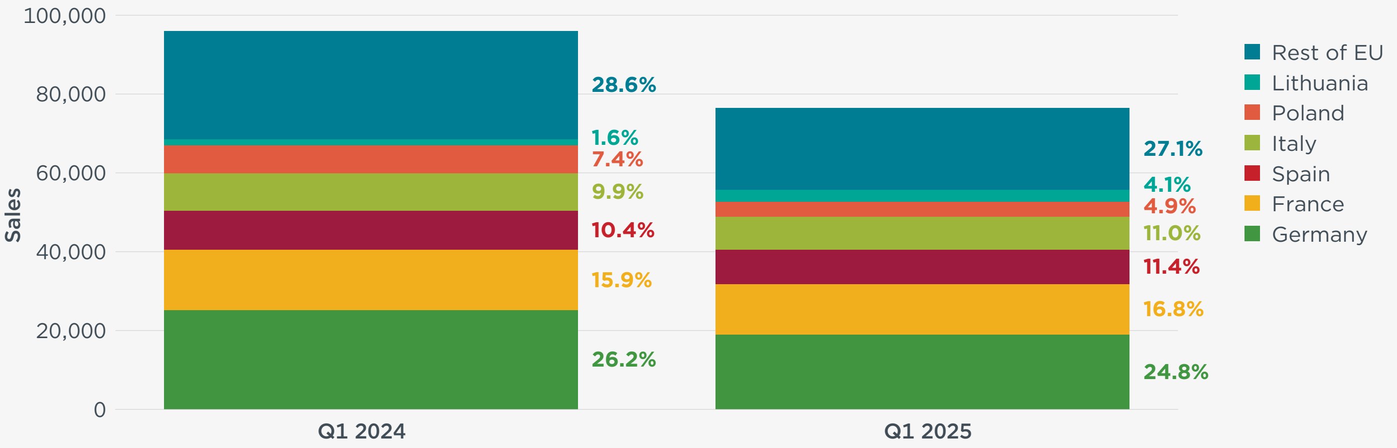

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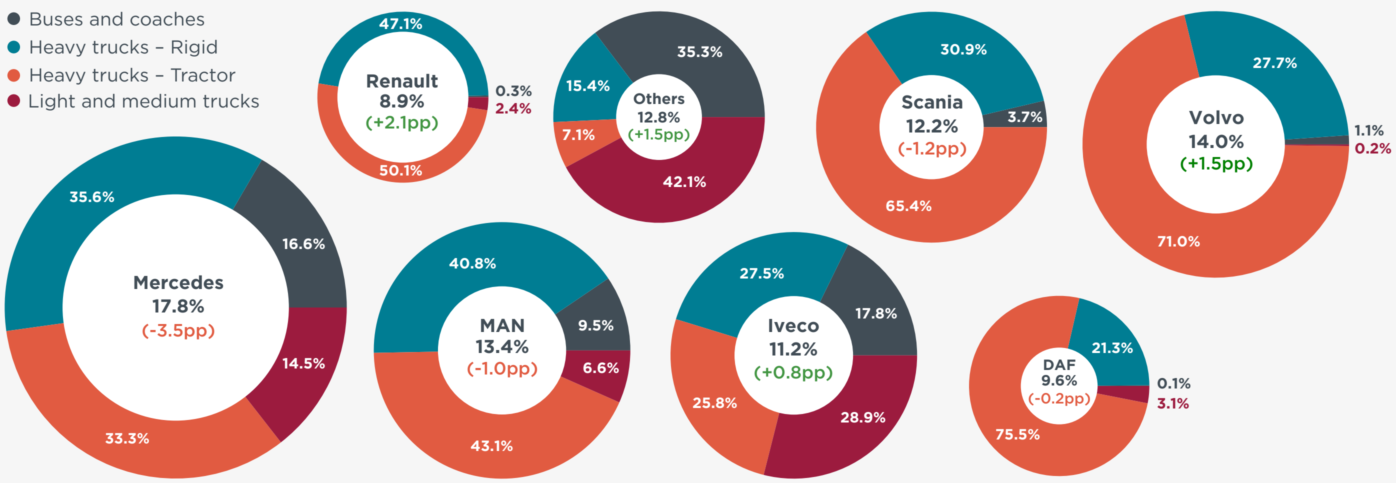
Figure 1.2

Manufacturer market share by vehicle segment in Q1 2025, with parentheses denoting changes in shares in percentage points relative to Q1 2024



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HEAVY TRUCKS

TRUCKS WITH A GROSS VEHICLE WEIGHT ABOVE 12 TONNES

In Q1 2025, heavy trucks accounted for 77% of all HDV sales. Out of 58,000 heavy trucks sold, 850 were zero-emission vehicles and that was a share of 1.5%. This marked a rise compared with the 1% share sold in Q1 2024, but no change compared with Q4 2024, which also had a 1.5% share. Volvo and Renault, the two brands of the Volvo Group, continued to dominate the zero-emission market by volume. They comprised a combined 57% share of all zero-emission heavy truck sales and MAN jumped to third place with a 15% sales share following the launch of its eTGX model, a tractor-trailer. Sales of zero-emission heavy trucks have yet to take off to the same extent for Mercedes, which has long been the largest HDV manufacturer in Europe by volume; it sold less than 100 of the European Union's zero-emission heavy trucks (10% sales share, largely sales of its eActros) despite holding an 18% share of the conventional market.

Germany continued to lead in sales of zero-emission heavy trucks in Q1 2025: It held 35% of the market with 300 units sold. Just four countries (Germany, France, the Netherlands, and Sweden) were responsible for 85% of all zero-emission heavy trucks sales. Sweden had the highest sales share of zero-emission heavy trucks at 8.7% and was followed by the Netherlands at 6.0% and Denmark at 4.5%.

Figure 2.1
Sales of heavy trucks by powertrain in Q1 2025

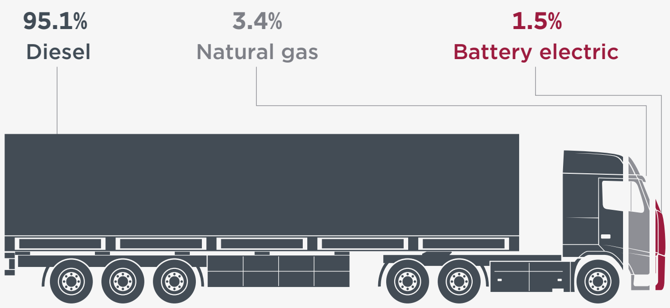

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Figure 2.2
Historic sales of zero-emission heavy trucks

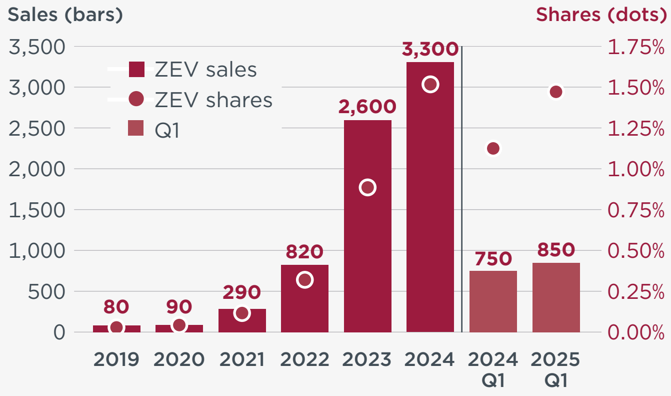

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Figure 2.3
Sales of zero-emission heavy trucks by configuration and powertrain in Q1 2025

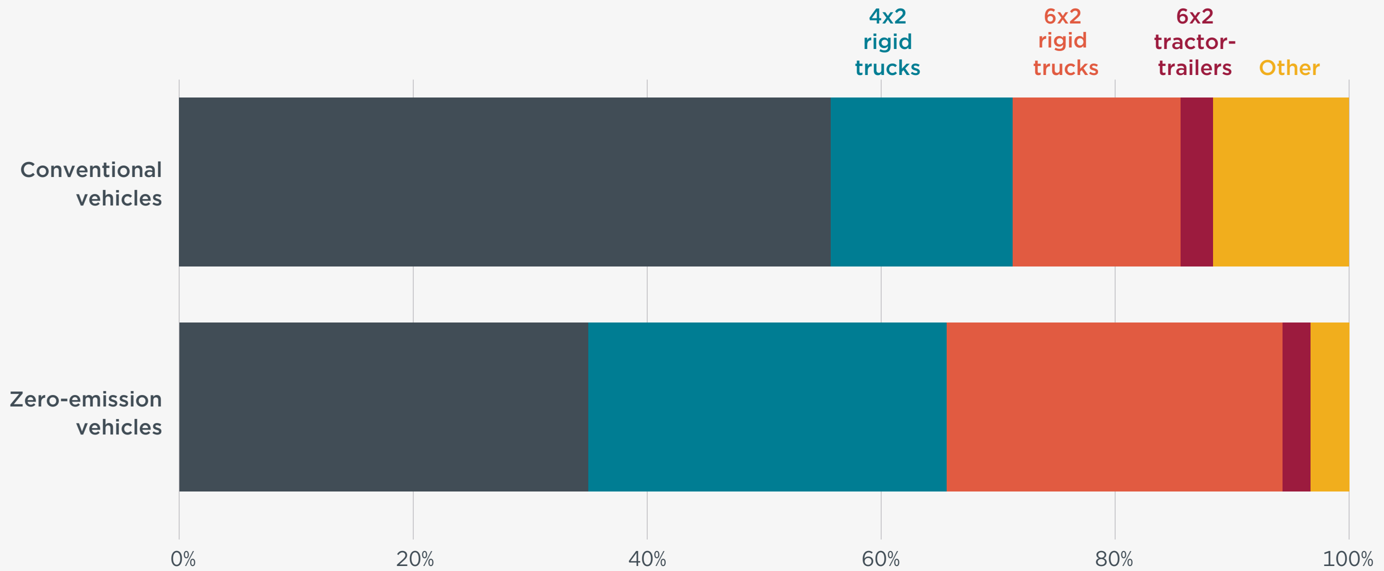

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Figure 2.4

Sales of zero-emission heavy trucks by share of Member State in Q1 2025

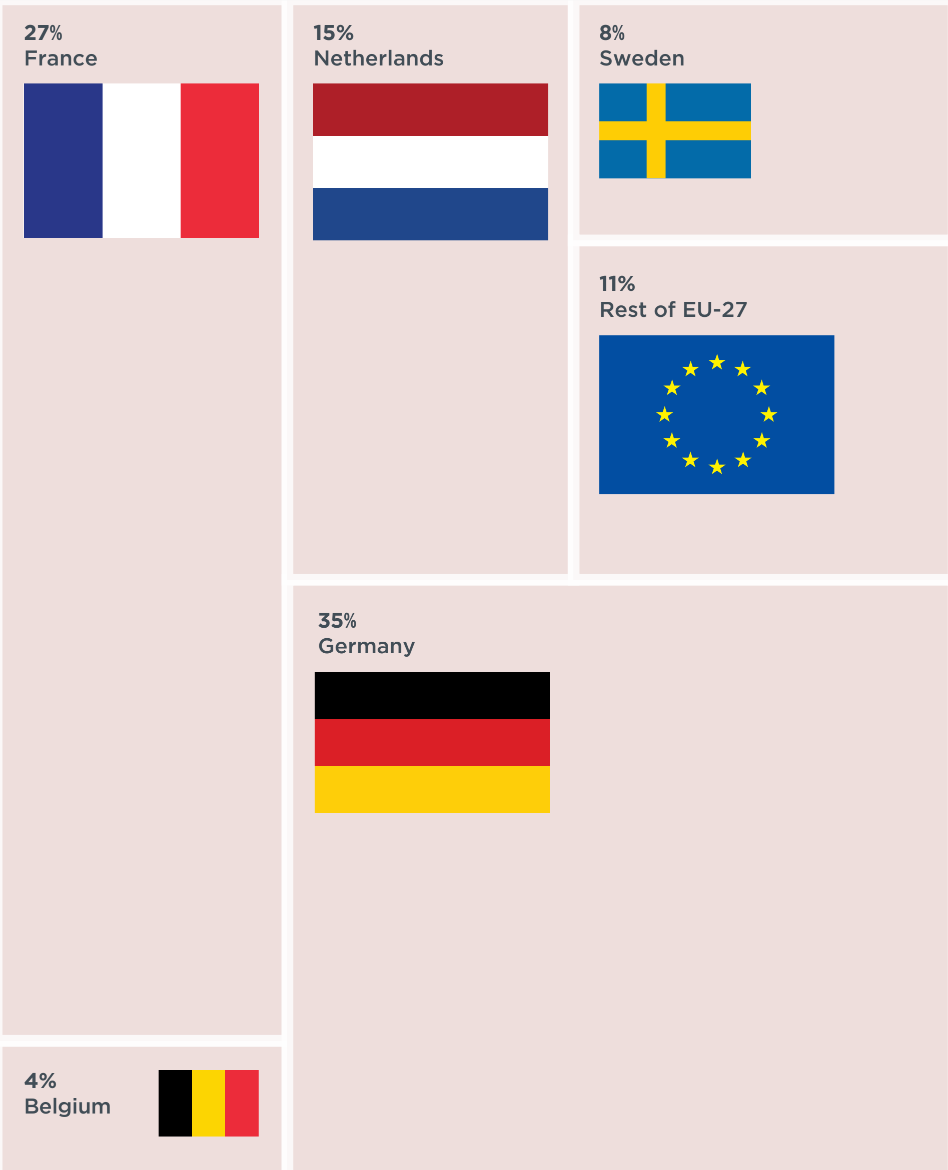

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Figure 2.5

Shares of heavy trucks by powertrain and manufacturer in Q1 2025

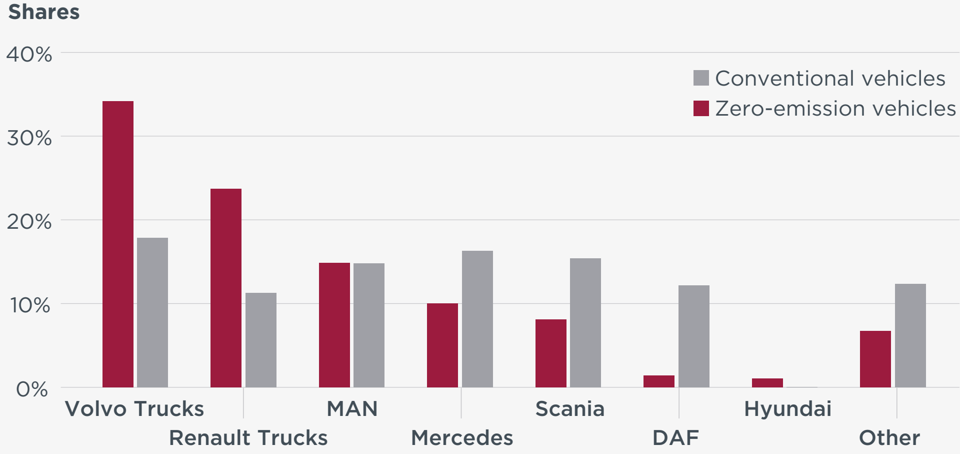

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Table 1

Sales of zero-emission heavy trucks in the EU-27, with sales shares in parentheses

Country	2024 Q1	2025 Q1
Austria	24 (1.2%)	23 (2.2%)
Belgium	14 (0.6%)	30 (1.2%)
Bulgaria	0 (0.0%)	0 (0.0%)
Croatia	1 (0.2%)	0 (0.0%)
Cyprus	0 (0.0%)	0 (0.0%)
Czech Republic	2 (0.1%)	5 (0.3%)
Denmark	53 (5.0%)	28 (4.5%)
Estonia	1 (0.5%)	0 (0.0%)
Finland	7 (1.0%)	0 (0.0%)
France	94 (0.7%)	228 (2.2%)
Germany	309 (1.6%)	300 (2.1%)
Greece	0 (0.0%)	2 (1.6%)
Hungary	1 (0.1%)	1 (0.2%)
Ireland	5 (0.5%)	1 (0.1%)

Country	2024 Q1	2025 Q1
Italy	13 (0.2%)	12 (0.2%)
Latvia	1 (0.3%)	0 (0.0%)
Lithuania	0 (0.0%)	0 (0.0%)
Luxembourg	0 (0.0%)	0 (0.0%)
Netherlands	123 (3.1%)	125 (6.0%)
Poland	6 (0.1%)	2 (0.1%)
Portugal	8 (2.5%)	0 (0.0%)
Romania	0 (0.0%)	0 (0.0%)
Slovakia	2 (0.2%)	0 (0.0%)
Slovenia	1 (0.1%)	0 (0.0%)
Spain	42 (0.6%)	23 (0.4%)
Sweden	74 (5.8%)	69 (8.7%)
EU-27	750 (1.0%)	849 (1.5%)

LIGHT AND MEDIUM TRUCKS

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

In Q1 2025, light and medium trucks were 12% of all HDV sales. Of the 9,300 light and medium trucks sold, 1,700 (18%) were zero-emission. This marked a nearly twofold increase over Q1 2024, when 930 (8%) of the trucks sold were zero-emission. Ford continues to be the driving force behind the rise in the zero-emission sales and comprised nearly one-third of all sales in Q1 2025. Over 80% of all the vehicles manufactured by Ford for the European market were zero-emission, and most of these were its E-Transit model. Sales of the Mercedes eSprinter have also been on the rise and reached 290 vehicles in Q1 2025, up from 19 vehicles sold in Q1 2024.

Sales of zero-emission light and medium trucks in the Netherlands rose rapidly in Q1 2025, with 510 zero-emission vehicles sold; that was 83% of all light and medium trucks sold and nearly three times higher than the total sold in all of 2024. The rise is likely driven by the introduction of zero-emission zones that have applied in 15 municipalities since the start of 2025. All new vans and trucks registered from the start of 2025 entering these zones must be zero-emission. Sales in most other countries remained stagnant, except in Italy, where the share for zero-emission vehicles reached 17% in Q1 2025, up from 6% in Q1 2024. The Netherlands had the highest sales share of zero-emission light and medium trucks and was followed by Denmark (54%) and Sweden (45%).

Figure 3.1
Sales of light and medium trucks by powertrain in Q1 2025

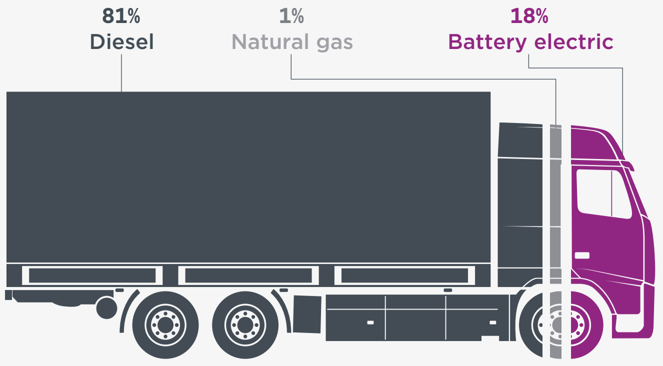

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Figure 3.2
Historic sales of zero-emission light and medium trucks

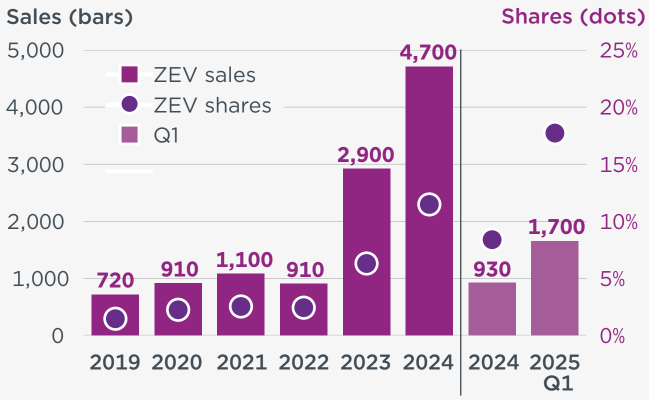

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Figure 3.3
Sales of zero-emission light and medium trucks by configuration and powertrain in Q1 2025

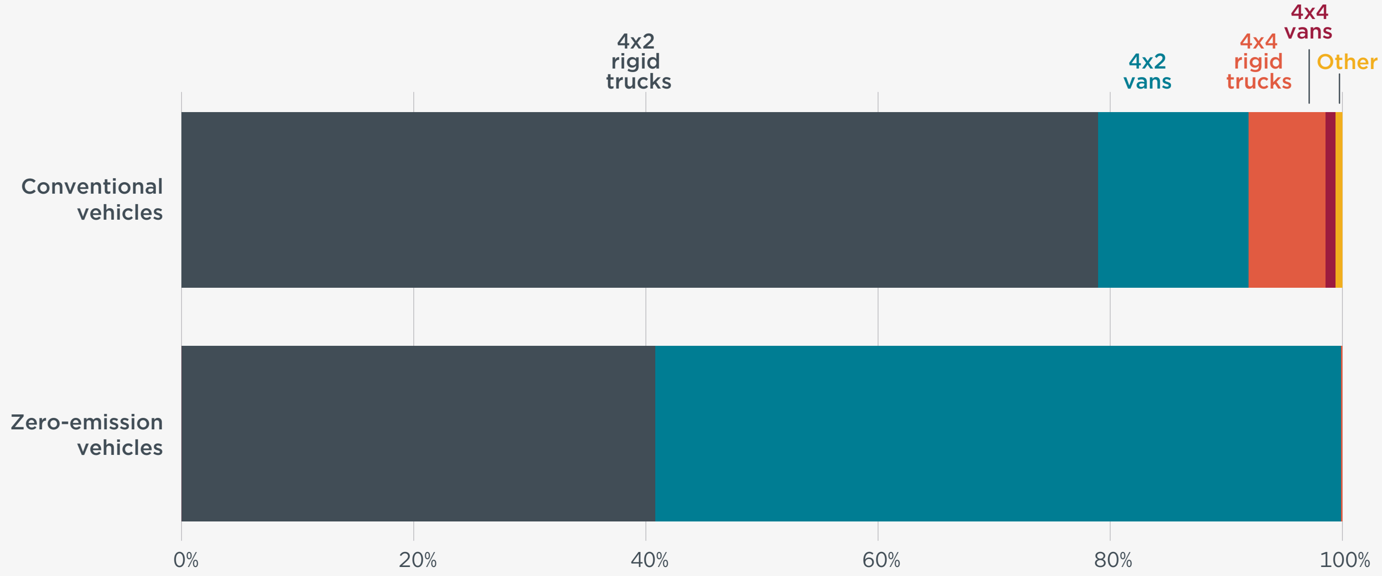

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Figure 3.4
Sales of zero-emission light and medium commercial vehicles by share of Member State in Q1 2025

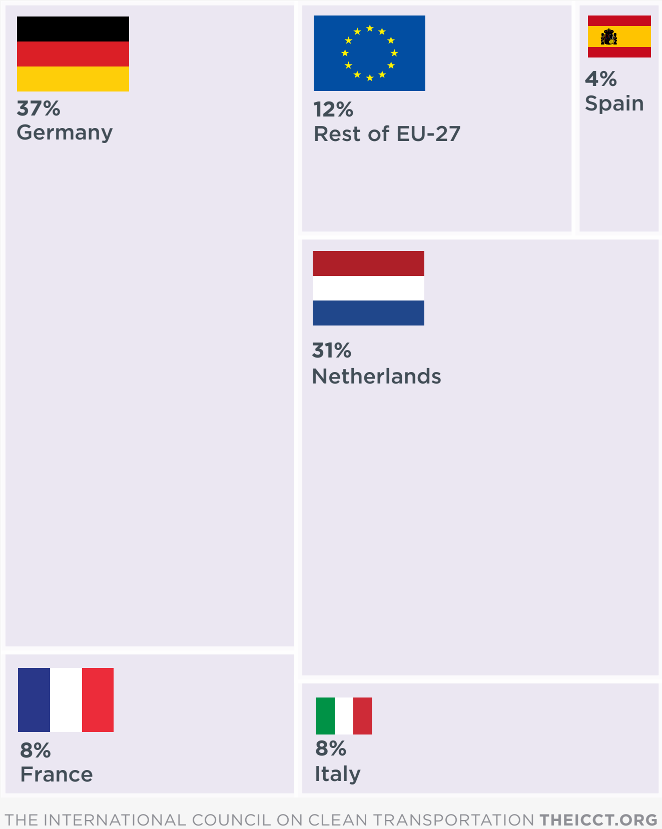

Figure 3.5
Shares of light and medium trucks by powertrain and manufacturer in Q1 2025

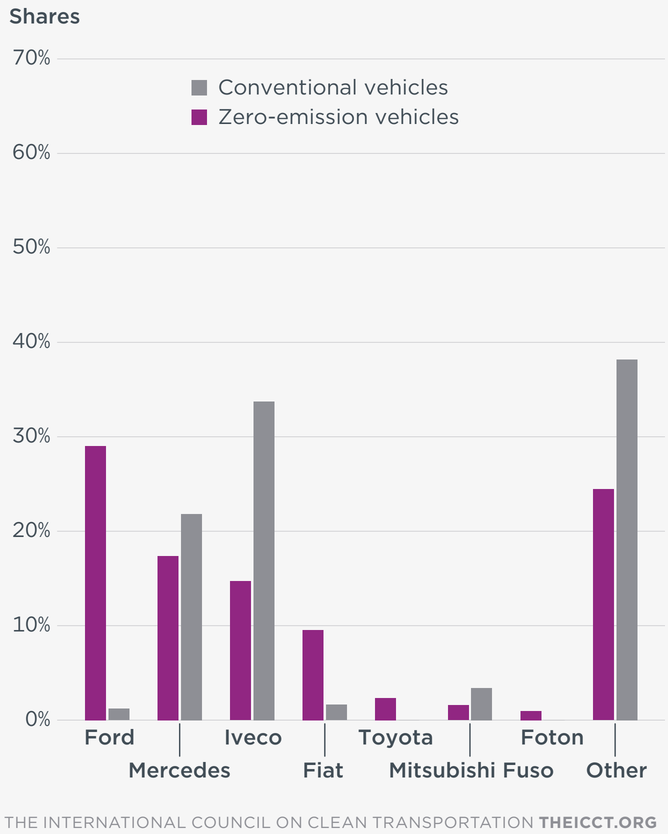

Table 2
Sales of zero-emission light and medium trucks in EU-27 countries, with sales shares in parentheses

Country	2024 Q1	2025 Q1
Austria	5 (4%)	9 (12%)
Belgium	9 (3%)	34 (9%)
Bulgaria	0 (0%)	0 (0%)
Croatia	0 (0%)	0 (0%)
Cyprus	0 (0%)	0 (0%)
Czech Republic	0 (0%)	10 (5%)
Denmark	30 (27%)	53 (54%)
Estonia	0 (0%)	0 (0%)
Finland	3 (2%)	5 (6%)
France	102 (7%)	137 (11%)
Germany	624 (15%)	605 (19%)
Greece	2 (3%)	1 (1%)
Hungary	14 (14%)	1 (2%)
Ireland	16 (9%)	12 (7%)
Italy	52 (6%)	135 (17%)
Latvia	1 (7%)	0 (0%)
Lithuania	1 (3%)	0 (0%)
Luxembourg	0 (0%)	1 (5%)
Netherlands	20 (7%)	508 (83%)
Poland	1 (0%)	6 (3%)
Portugal	15 (7%)	12 (9%)
Romania	1 (0%)	27 (21%)
Slovakia	2 (2%)	0 (0%)
Slovenia	0 (0%)	0 (0%)
Spain	30 (2%)	64 (4%)
Sweden	1 (1%)	33 (45%)
EU-27	929 (8%)	1,653 (18%)

BUSES AND COACHES

WITH A GROSS VEHICLE WEIGHT ABOVE 3.5 TONNES

Buses and coaches were 11% of all HDV sales in Q1 2025. Of the 8,300 buses sold, 1,600 were zero-emission vehicles, 19% of total sales; that was up from the 1,100 sales, a 12% share, in Q1 2024. Battery electric city buses were 46% of all city bus registrations in Q1 2025, a slight drop from 52% in Q1 2024 but still above the share of diesel city buses sold.

Mercedes remained the top-selling manufacturer of zero-emission buses and coaches by selling 310 units of its eCitaro and eSprinter models; that was 19% of all sales. MAN jumped into a close second place with an 18% market share that was achieved exclusively through sales of its MAN Lions City model.

Shares of zero-emission buses and coaches have been rising across all Member States and were the highest in Sweden (67%), Romania (55%), and the Netherlands (54%). For city buses, only zero-emission sales were recorded in Q1 2025 in Romania, Latvia, Hungary, and Denmark, and the sales share was above 50% in Poland, Greece, the Netherlands, Belgium, Sweden, Lithuania, and Luxembourg.

Figure 4.1
Sales of city buses (top) and interurban buses and coaches (bottom) by powertrain in Q1 2025

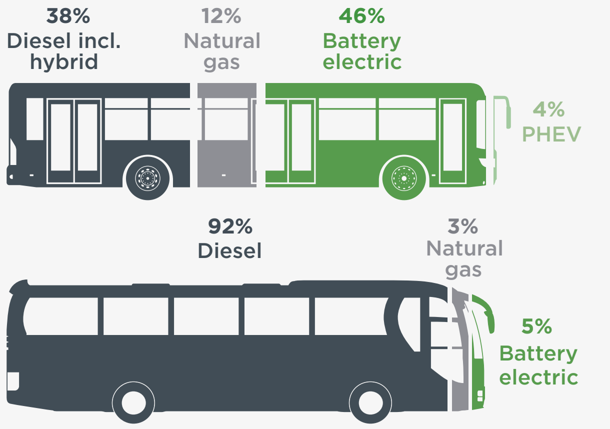

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Figure 4.2
Historic sales of zero-emission buses and coaches

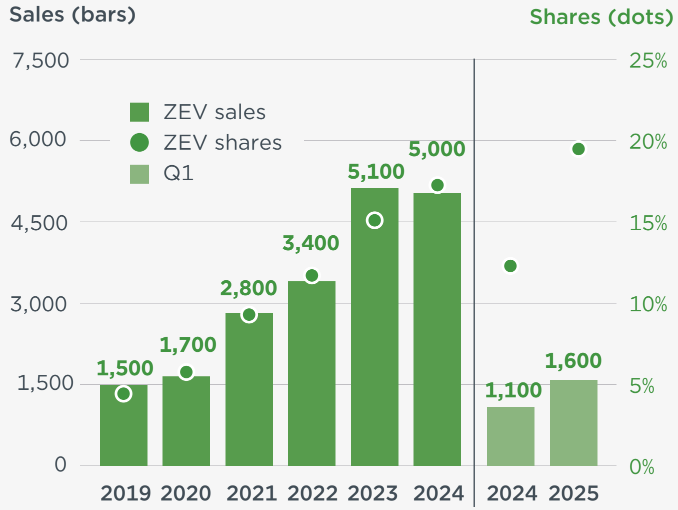

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Figure 4.3
Sales of city buses by Member State and powertrain

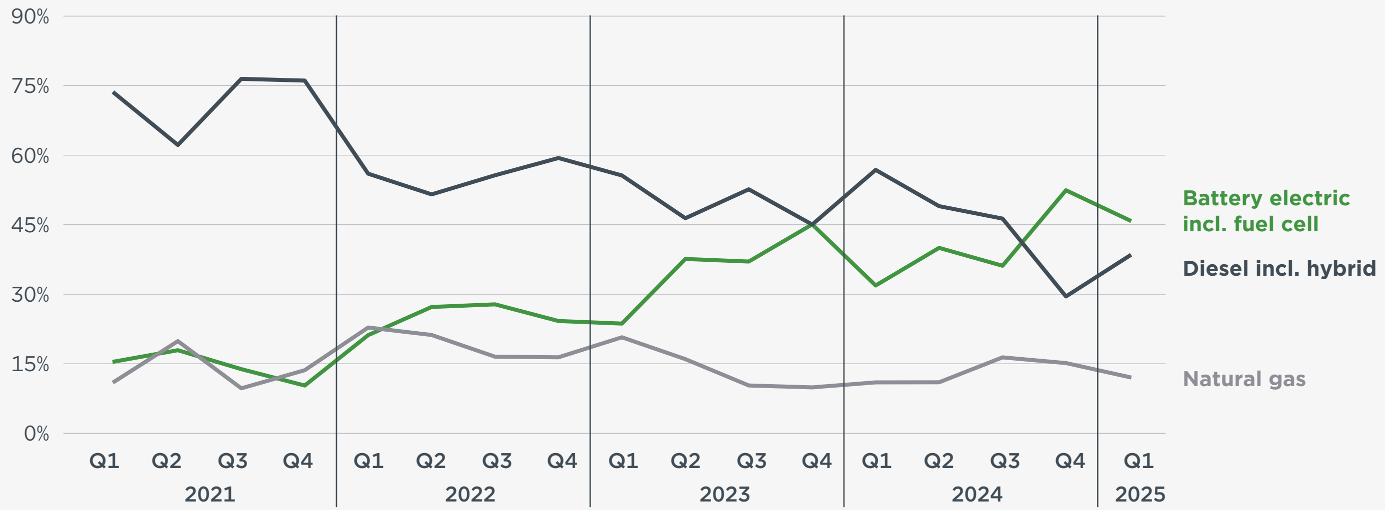

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Figure 4.4
Sales of city buses by powertrain and Member State in Q1 2025

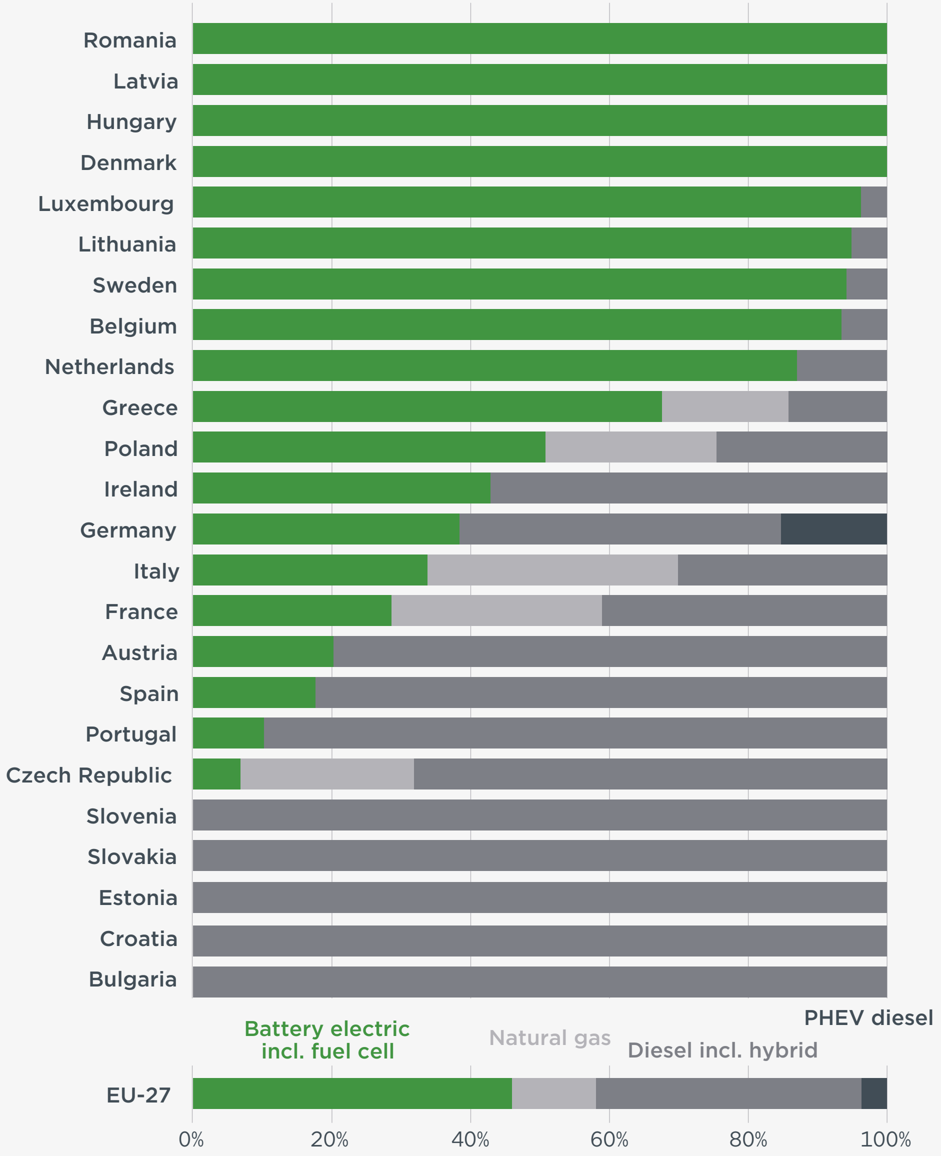

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Figure 4.5
Shares of all buses and coaches by powertrain and manufacturer in Q1 2025

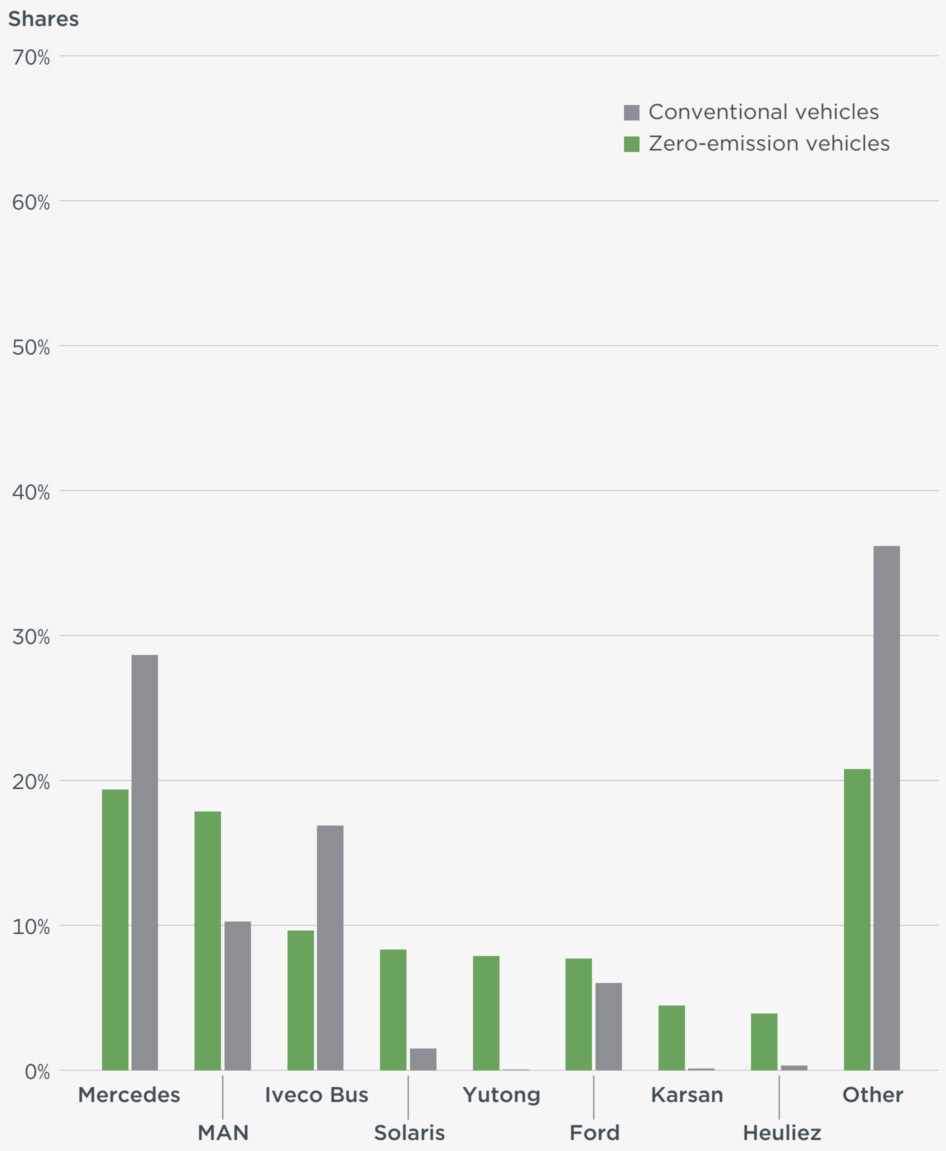

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Table 3
Sales of zero-emission buses and coaches in EU-27 countries, with sales shares in parentheses

Country	2024 Q1	2025 Q1
Austria	6 (2%)	27 (15%)
Belgium	46 (17%)	131 (44%)
Bulgaria	0 (0%)	0 (0%)
Croatia	0 (0%)	0 (0%)
Cyprus	0 (0%)	0 (0%)
Czech Republic	0 (0%)	3 (1%)
Denmark	119 (80%)	41 (52%)
Estonia	1 (2%)	0 (0%)
Finland	11 (52%)	0 (0%)
France	132 (10%)	148 (11%)
Germany	165 (10%)	275 (21%)
Greece	6 (21%)	100 (50%)
Hungary	0 (0%)	2 (5%)
Ireland	61 (18%)	9 (2%)
Italy	92 (6%)	166 (13%)
Latvia	4 (6%)	7 (47%)
Lithuania	1 (2%)	39 (41%)
Luxembourg	70 (67%)	26 (25%)
Netherlands	34 (25%)	120 (54%)
Poland	43 (10%)	37 (12%)
Portugal	69 (25%)	4 (4%)
Romania	156 (31%)	246 (55%)
Slovakia	0 (0%)	0 (0%)
Slovenia	0 (0%)	0 (0%)
Spain	73 (7%)	42 (4%)
Sweden	8 (6%)	161 (67%)
EU-27	1,097 (12%)	1,584 (19%)

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.

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