RACE TO ZERO: EUROPEAN HEAVY-DUTY VEHICLE MARKET DEVELOPMENT QUARTERLY (JANUARY – JUNE 2025)

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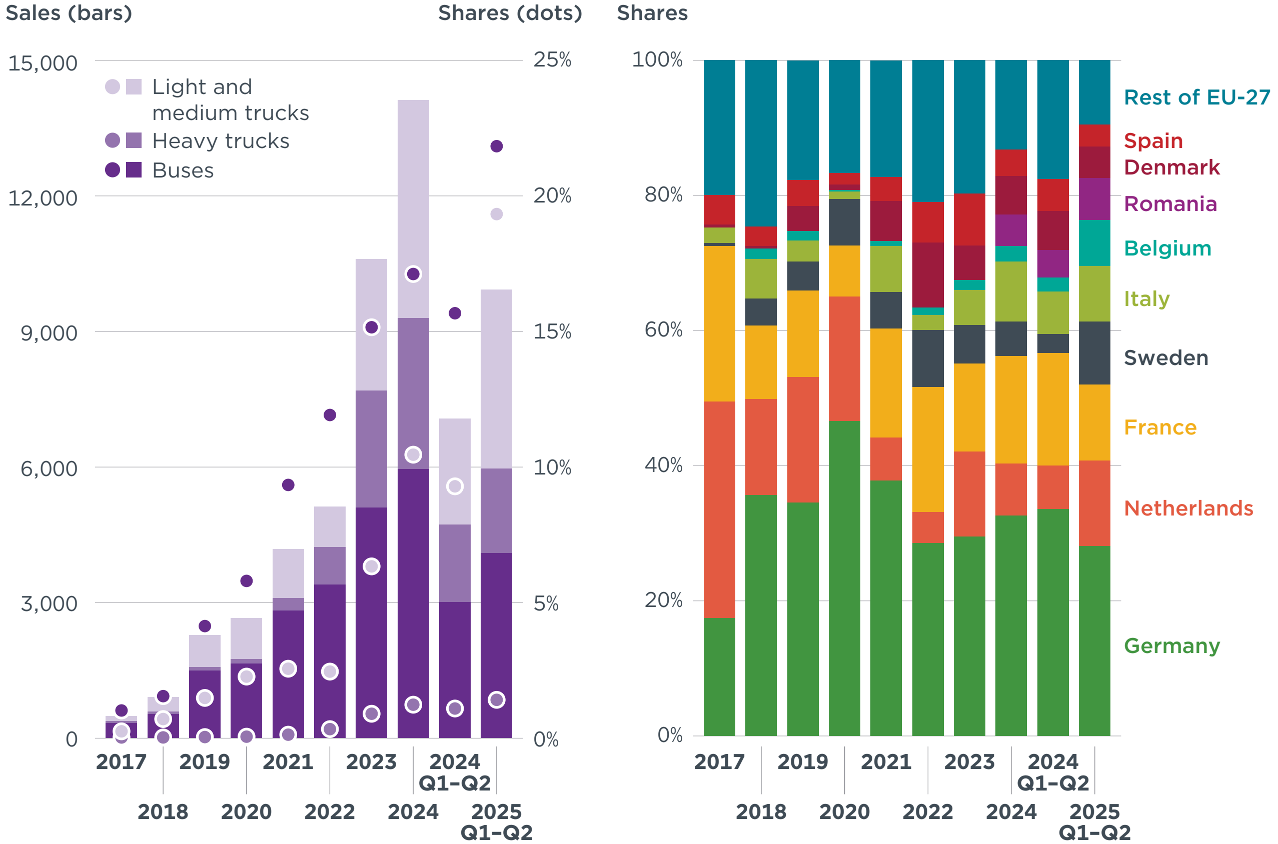

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SUMMARY

Sales of zero-emission heavy-duty vehicles (ZE HDVs) continued to grow across the European Union in the second quarter (Q2) of 2025 despite another contraction of total sales of HDVs. New HDV registrations fell by 15% in the first half (Q1–Q2) of 2025 compared with the same period in 2024, while new ZE HDV registrations rose by 40%, from 7,100 to 10,000, over the same period.

Most of the growth in ZE HDV sales can be attributed to the light and medium trucks sector (with a weight below 12 tonnes) and the bus and coach sector. Shares of ZE light and medium trucks more than doubled from 9% to 19% in Q1–Q2 2025 compared with the same period in 2024, with 4,000 vehicles sold, up from 2,400. Shares of ZE buses and coaches rose from 16% to 22% over the same period, growing from 3,000 to 4,100 vehicles, largely driven by the sales of ZE city buses, shares of which hit an all-time high of 60% in Q2 of this year.

Growth in the sales of ZE heavy trucks (with a weight above 12 tonnes) was less pronounced, with sales in Q1–Q2 2025 broadly equal to the same period in 2024 but with shares reaching 1.4%, up from 1.1% in Q1–Q2 2024. A carbon dioxide (CO_2) reduction target of 15% for heavy trucks will first apply in Q3 2025, which may spur further growth in the sector in the second half of the year. CO_2 targets will not apply to light and medium trucks or to buses and coaches until 2030.

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OVERALL MARKET DEVELOPMENTS

The HDV market contracted in Q1–Q2 2025 compared with the same period in 2024, with new registrations dropping by around 15%, from 206,000 to 176,000. Sales fell by 26% in Germany, the European Union's largest market for HDV sales, and by similar levels in Austria, Finland, the Netherlands, and Slovakia. Sales also fell in the major markets of France, Italy, and Spain by 15%–19%. The contraction was concentrated in the truck sector, while sales of buses and coaches only fell by 2% in Q1–Q2 2025 compared with Q1–Q2 2024.

Mercedes, Europe's largest HDV manufacturer, has been hardest hit by this market contraction, with sales down 25% in Q1–Q2 2025 across all HDVs compared with Q1–Q2 2024. In May, the company reduced its 2025 operating profit outlook to growth between −5% and +5%, down from previous projections of between +5% and +15%. Mercedes also launched an initiative in 2025 to save more than €1 billion in total annual costs by 2030.

Mercedes remains the largest HDV manufacturer by volume, although its shares of all HDV sales in the European Union have fallen from 21% in Q1–Q2 2024 to 18% in Q1–Q2 2025. Volvo Trucks and Renault Trucks (both part of the Volvo Group) also experienced market contractions but saw an increase in their shares over other manufacturers during the period, rising from 12% to 14% and 7% to 8%, respectively.

Figure 1.1

HDV sales by share sold in each Member State in Q1–Q2 2024 and Q1–Q2 2025

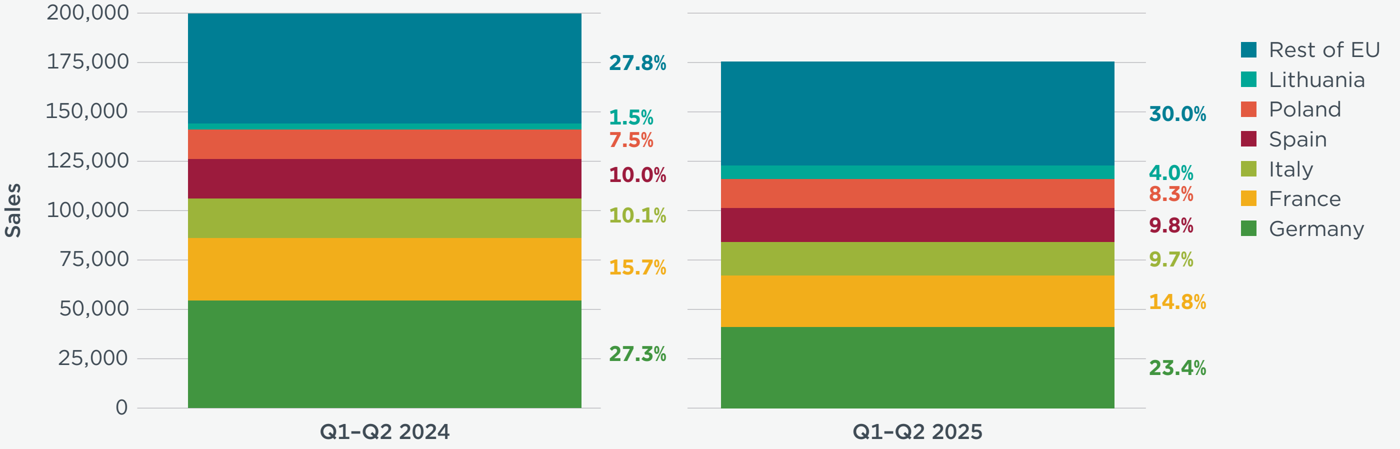

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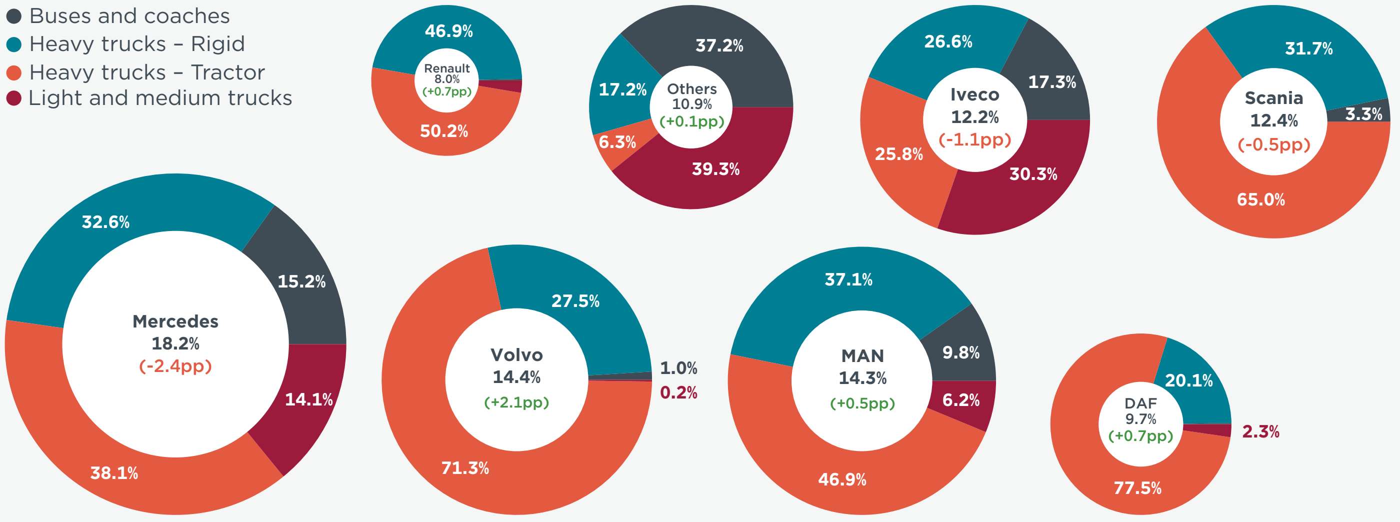
Figure 1.2.

Manufacturer market share by vehicle segment in Q1–Q2 2025 (values in parentheses denote percentage-point changes in market share relative to Q1–Q2 2024)



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HEAVY TRUCKS

TRUCKS WITH A GROSS VEHICLE WEIGHT ABOVE 12 TONNES

In Q1–Q2 2025, heavy trucks accounted for 76% of all HDV sales. Out of 134,000 heavy trucks sold, 1,900 were ZE HDVs. The sales volume has largely remained unchanged compared with Q1–Q2 2024, but the sales shares have risen from 1.1% to 1.4%.

Volvo and Renault continue to dominate the ZE market by volume, comprising a combined share of more than 50% of all ZE heavy truck sales in Q1–Q2 2025, albeit down from a 66% share in Q1–Q2 2024. Mercedes and MAN both increased their sales shares over this period. MAN's share of all ZE heavy trucks sold rose from 1% in Q1–Q2 2024 to 10% in Q1–Q2 2025, owing largely to continued sales of its eTGX model, a tractor-trailer used predominantly for long-haul transport. Mercedes made up just under 20% of ZE heavy truck sales in Q1–Q2 2025, largely driven by increasing sales of its eActros. Iveco sold just 7 ZE heavy trucks in Q1–Q2 2025, or 0.4% of all ZE heavy truck sales.

Despite market contractions, Germany remains the largest market for ZE heavy truck sales by volume in Q1–Q2 2025 (580 sales, 1.8% share), closely followed by France (410 sales, 2.0% share). While most countries had a ZE sales share below 2.5% of all sales, shares in Sweden and the Netherlands far exceeded the EU-27 average, reaching 7.0% (180 vehicles) and 6.3% (310 vehicles), respectively, in Q1–Q2 2025.

Figure 2.1
Sales of heavy trucks by powertrain in Q2 2025

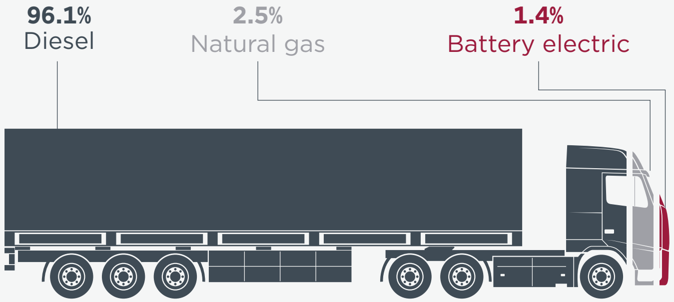

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Figure 2.2
Historic sales of zero-emission heavy trucks

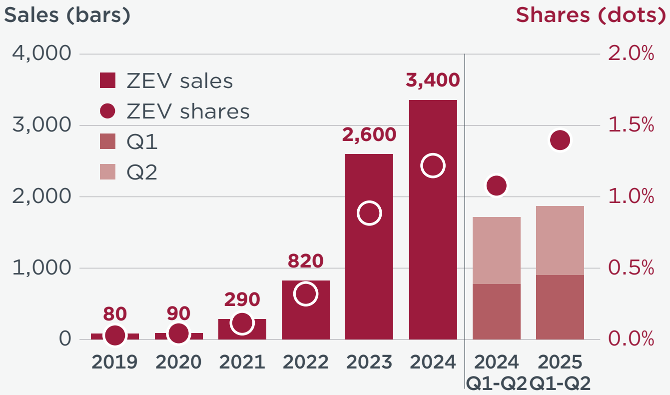

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Figure 2.3
Sales of heavy trucks by Vehicle Energy Consumption calculation Tool (VECTO) group and powertrain in Q1–Q2 2025

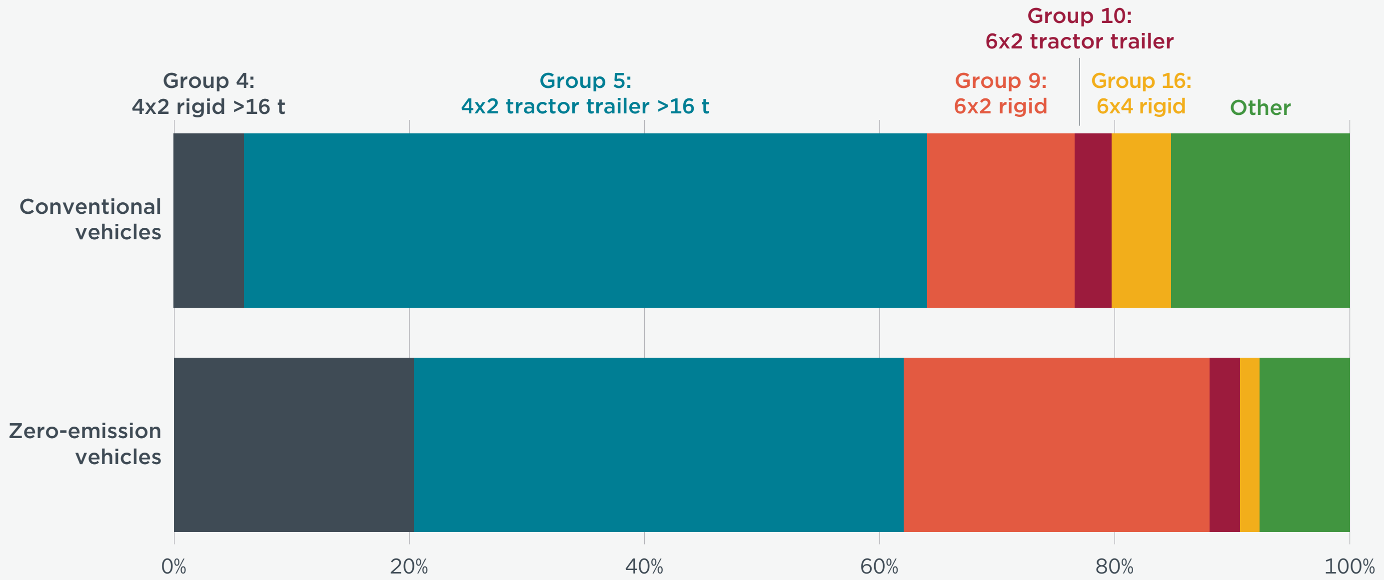

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Figure 2.4

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

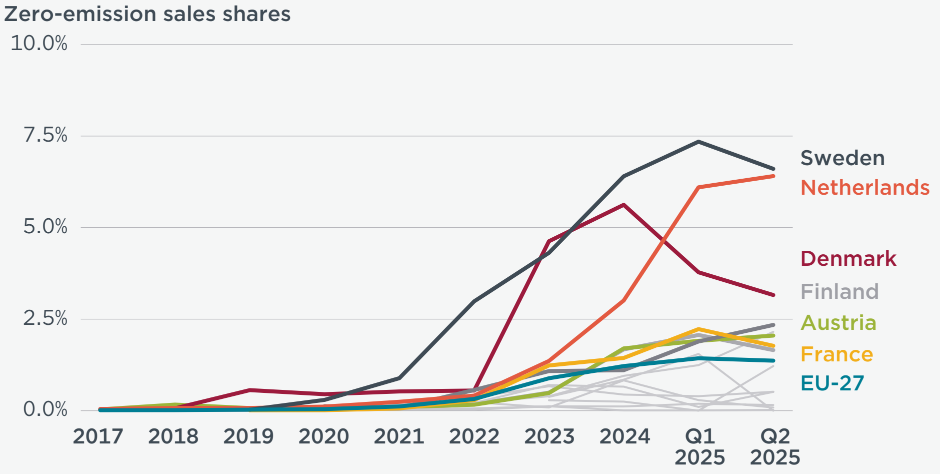

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Figure 2.5

Shares of heavy trucks by powertrain and manufacturer in Q1–Q2 2025

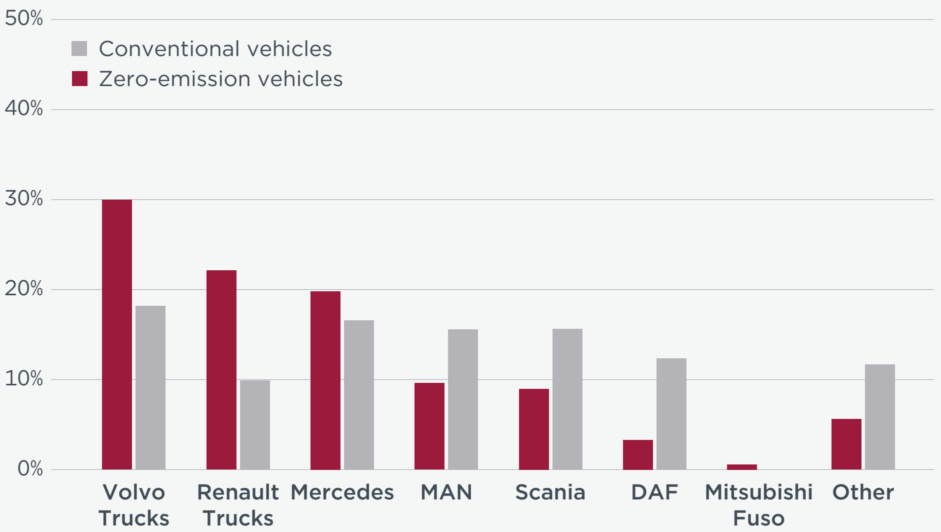

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Table 1

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

Country	2024 Q2	2025 Q2	2024 Q1–Q2	2025 Q1–Q2
Austria	43 (1.7%)	35 (2.1%)	67 (1.5%)	67 (2.0%)
Belgium	25 (1.0%)	44 (2.2%)	39 (0.8%)	74 (1.7%)
Croatia	0 (0.0%)	0 (0.0%)	1 (0.1%)	0 (0.0%)
Czech Republic	0 (0.0%)	7 (0.3%)	2 (0.0%)	12 (0.3%)
Denmark	52 (4.5%)	44 (3.2%)	105 (4.7%)	79 (3.4%)
Estonia	0 (0.0%)	2 (0.9%)	1 (0.3%)	2 (0.5%)
Finland	8 (1.2%)	13 (2.3%)	15 (1.1%)	24 (2.1%)
France	149 (1.1%)	184 (1.8%)	243 (0.9%)	412 (2.0%)
Germany	335 (1.4%)	281 (1.7%)	644 (1.5%)	581 (1.8%)
Greece	0 (0.0%)	0 (0.0%)	0 (0.0%)	2 (0.8%)
Hungary	2 (0.1%)	9 (0.7%)	3 (0.1%)	11 (0.5%)
Ireland	7 (1.0%)	3 (0.5%)	12 (0.7%)	4 (0.3%)
Italy	10 (0.1%)	10 (0.2%)	23 (0.2%)	22 (0.2%)
Latvia	1 (0.3%)	0 (0.0%)	2 (0.3%)	0 (0.0%)
Lithuania	0 (0.0%)	1 (0.0%)	0 (0.0%)	1 (0.0%)
Luxembourg	0 (0.0%)	3 (1.2%)	0 (0.0%)	3 (0.6%)
Netherlands	156 (4.3%)	187 (6.4%)	279 (3.6%)	314 (6.3%)
Poland	8 (0.1%)	4 (0.1%)	14 (0.1%)	9 (0.1%)
Portugal	0 (0.0%)	1 (0.1%)	8 (1.4%)	4 (0.2%)
Romania	2 (0.1%)	11 (0.4%)	2 (0.0%)	11 (0.3%)
Slovakia	1 (0.1%)	3 (0.4%)	3 (0.2%)	4 (0.3%)
Slovenia	1 (0.2%)	2 (0.3%)	2 (0.2%)	2 (0.2%)
Spain	30 (0.4%)	29 (0.5%)	72 (0.5%)	52 (0.5%)
Sweden	105 (6.6%)	92 (6.6%)	179 (6.2%)	182 (7.0%)
EU-27	935 (1.1%)	965 (1.4%)	1,716 (1.1%)	1,872 (1.4%)

LIGHT AND MEDIUM TRUCKS

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

In Q1–Q2 2025, light and medium trucks represented 12% of all HDV sales. Of the 21,000 light and medium trucks sold, 4,000 were ZE HDVs, making up 19% of the segment's sales. This marked a more than doubling in shares over Q1–Q2 2024, in which 9% (or 2,400) of trucks sold were ZE.

Most ZE light and medium trucks were comprised of just four models: Ford's E-Transit (25% of all ZE light and medium truck sales in Q1–Q2 2025), Mercedes' eSprinter (22%), Iveco's eDaily (15%), and Fiat's E-Ducato (11%). The sale of ZE light and medium trucks has been concentrated in the 3.5 t–5 t weight range, which comprises nearly 70% of all ZE sales but just 15% of conventional vehicle sales. ZE models in the heavier weight ranges (between 7.5 t and 12 t) are more nascent, representing 4% of all ZE light and medium truck sales in Q1–Q2 2025 but around 33% of diesel sales.

The sales shares of ZE light and medium trucks surpassed 50% in the Netherlands, Denmark, and Sweden in Q1–Q2 2025. Sweden has shown particularly rapid growth, with ZE shares rising from <1% in 2023 to 72% in Q2 2025. Possibly driving this growth was a subsidy scheme launched in early 2024 that funded up to 25% of the cost of an electric truck, rising to 60% in the case of small enterprises. In late 2024, the program was amended to allow lessees of ZE trucks to benefit from the scheme.

Figure 3.1
Sales of light and medium trucks by powertrain in Q2 2025

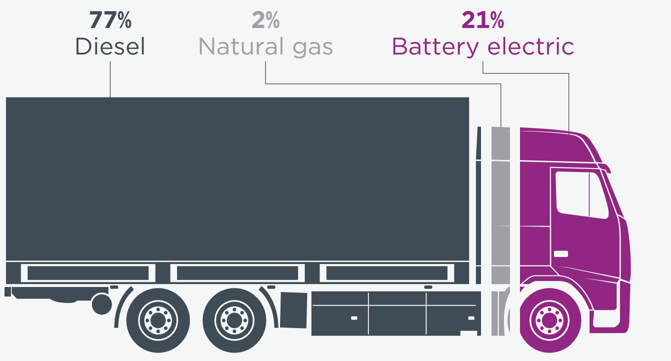

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Figure 3.2
Historic sales of zero-emission light and medium trucks

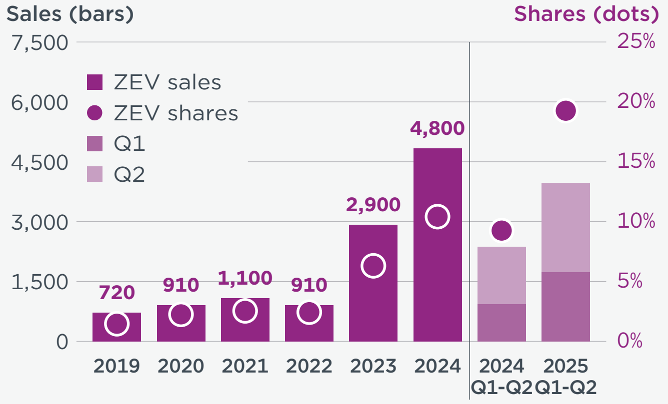

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Figure 3.3
Sales of light and medium trucks by VECTO group and powertrain in Q1–Q2 2025

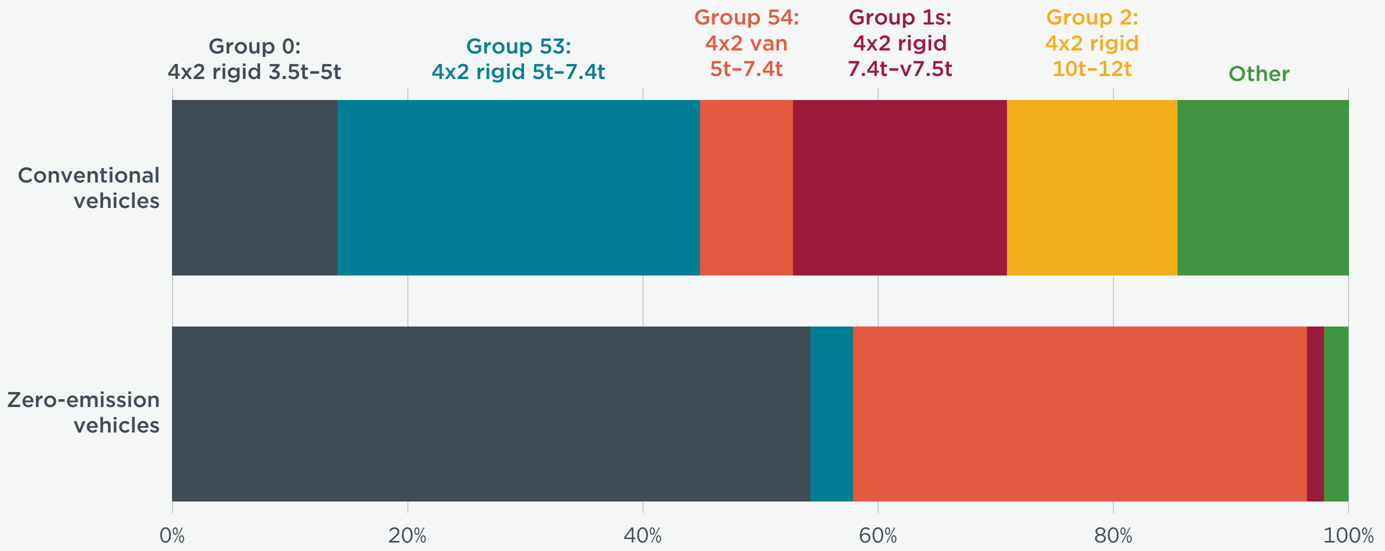

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Figure 3.4
Sales shares of zero-emission light and medium trucks by select Member States

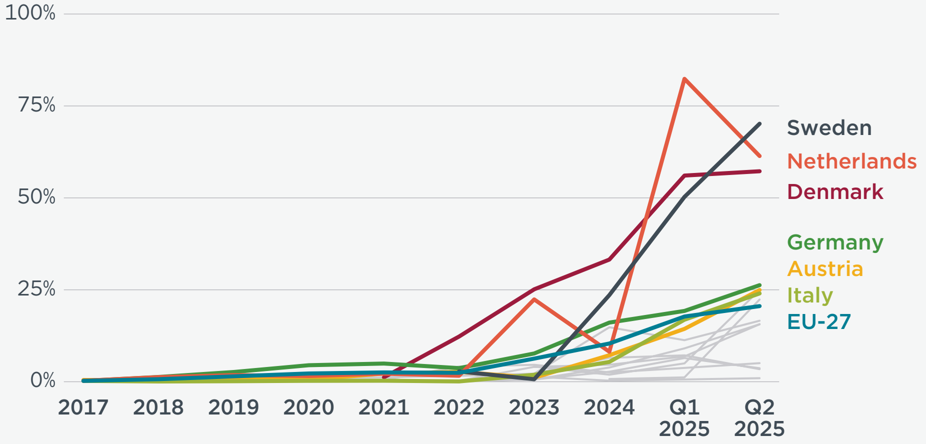

Figure 3.5
Shares of light and medium trucks by powertrain and manufacturer in Q1–Q2 2025

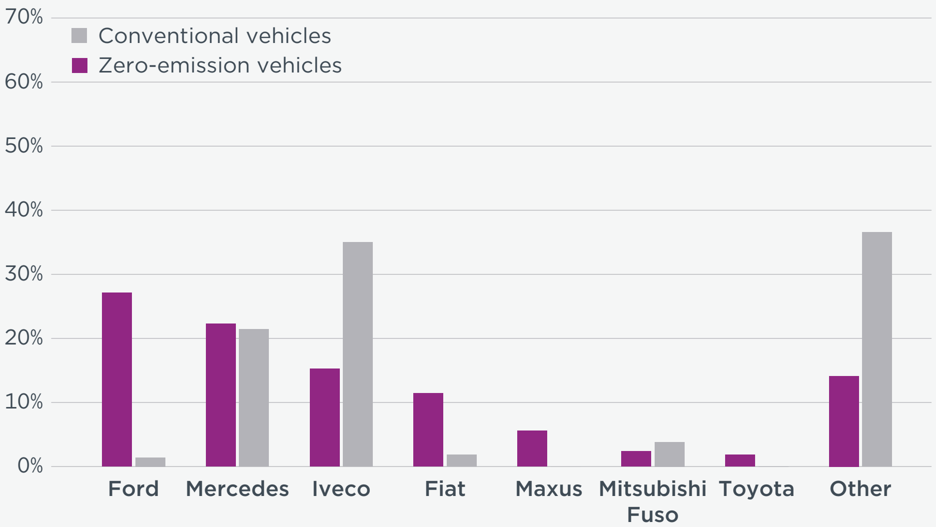

Table 2
Sales of zero-emission light and medium trucks in EU-27 countries (sales shares are shown in brackets)

Country	2024 Q2	2025 Q2	2024 Q1-Q2	2025 Q1-Q2
Austria	16 (7.0%)	32 (25.0%)	21 (5.8%)	50 (19.8%)
Belgium	21 (6.0%)	44 (15.7%)	30 (4.4%)	78 (11.9%)
Croatia	0 (0.0%)	2 (2.9%)	0 (0.0%)	2 (2.2%)
Czech Republic	6 (1.9%)	35 (11.2%)	6 (1.0%)	45 (8.8%)
Denmark	45 (26.9%)	125 (57.3%)	75 (27.0%)	207 (56.9%)
Finland	3 (1.4%)	5 (3.7%)	6 (1.4%)	11 (4.8%)
France	412 (19.8%)	258 (16.6%)	514 (14.5%)	395 (14.3%)
Germany	728 (13.0%)	903 (26.3%)	1,352 (14.0%)	1,508 (23.0%)
Greece	0 (0.0%)	28 (22.4%)	2 (0.9%)	29 (13.9%)
Hungary	1 (0.6%)	13 (20.3%)	15 (5.8%)	13 (10.4%)
Ireland	2 (1.9%)	13 (15.7%)	18 (6.2%)	25 (9.7%)
Italy	62 (5.6%)	229 (24.1%)	114 (5.7%)	363 (20.8%)
Latvia	0 (0.0%)	1 (8.3%)	1 (3.4%)	1 (4.5%)
Lithuania	0 (0.0%)	0 (0.0%)	1 (1.9%)	0 (0.0%)
Luxembourg	1 (3.4%)	4 (25.0%)	1 (2.1%)	5 (13.9%)
Netherlands	47 (10.3%)	158 (61.5%)	67 (8.8%)	663 (76.3%)
Poland	9 (1.2%)	7 (1.3%)	10 (0.8%)	19 (2.1%)
Portugal	6 (3.5%)	5 (3.4%)	21 (5.4%)	17 (5.4%)
Romania	5 (2.3%)	55 (32.5%)	6 (1.4%)	82 (27.4%)
Slovakia	7 (6.6%)	4 (4.4%)	9 (4.3%)	4 (2.5%)
Slovenia	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)
Spain	52 (2.7%)	95 (5.1%)	82 (2.3%)	163 (4.4%)
Sweden	8 (6.1%)	220 (70.3%)	9 (4.0%)	291 (64.1%)
EU-27	1,431 (9.9%)	2,236 (20.6%)	2,360 (9.2%)	3,971 (19.3%)

BUSES AND COACHES

WITH A GROSS VEHICLE WEIGHT ABOVE 3.5 TONNES

Buses and coaches represented 12% of all HDV sales in Q1–Q2 of 2025. Of the 19,000 buses sold, 4,100 were zero-emission vehicles, accounting for 22% of total sales, up from the 3,000 sales, or a 16% share, in Q1–Q2 2024. Battery electric city buses reached a new high, accounting for 60% of all city bus registrations in Q2, while ZE sales of minibuses (buses with a weight between 3.5 t and 7.5 t) reached 13%. The corresponding share for interurban buses and coaches was significantly lower, at just 3%.

The sale of ZE interurban buses and coaches was almost exclusively from the sale of Iveco's Crossway, an interurban bus, of which 190 were sold in Q1–Q2 of 2025. Sales of ZE coaches have been nascent in the European Union so far.

Shares of ZE buses and coaches rose sharply in Belgium, from 17% in Q1–Q2 2024 to 62% in Q1–Q2 2025, and in Sweden, from 3% to 50% over the same period. For city buses, only ZE sales were recorded in Q1–Q2 2025 in Denmark, Finland, Lithuania, the Netherlands, and Romania, and the sales share was above 50% in Belgium, Ireland, Luxembourg, Poland, Portugal, Spain, and Sweden.

Figure 4.1
Sales of city buses (top), interurban buses and coaches (middle), and minibuses (bottom) by powertrain in Q2 2025

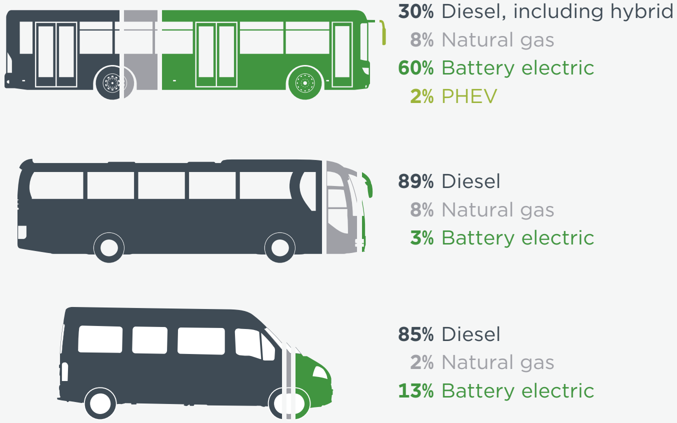

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Figure 4.2
Historic sales of zero-emission buses and coaches

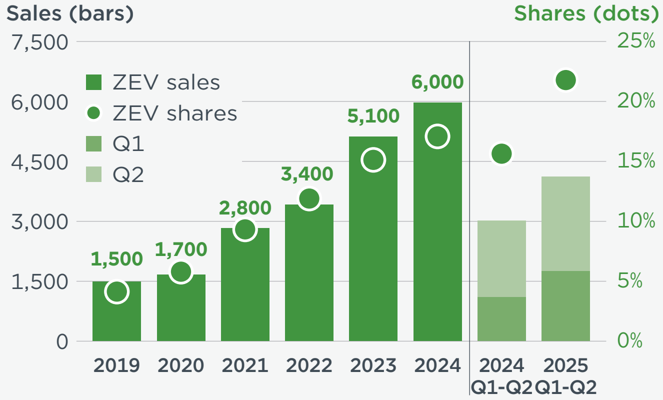

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Figure 4.3
Sales of city buses by powertrain

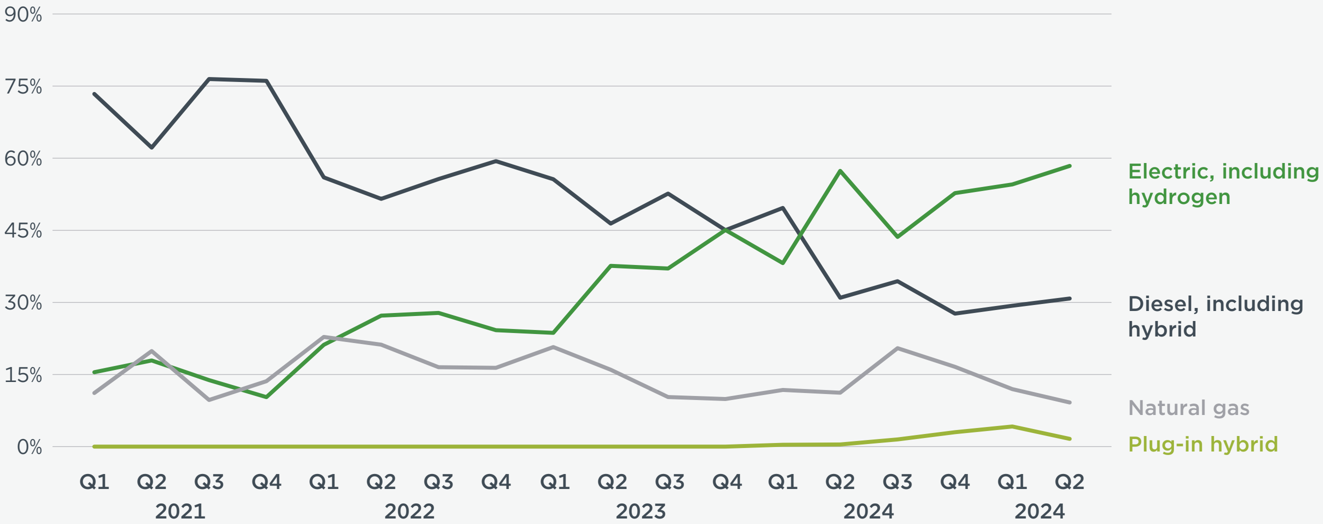

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Figure 4.4
Sales of city buses by powertrain and Member State in Q1–Q2 2025

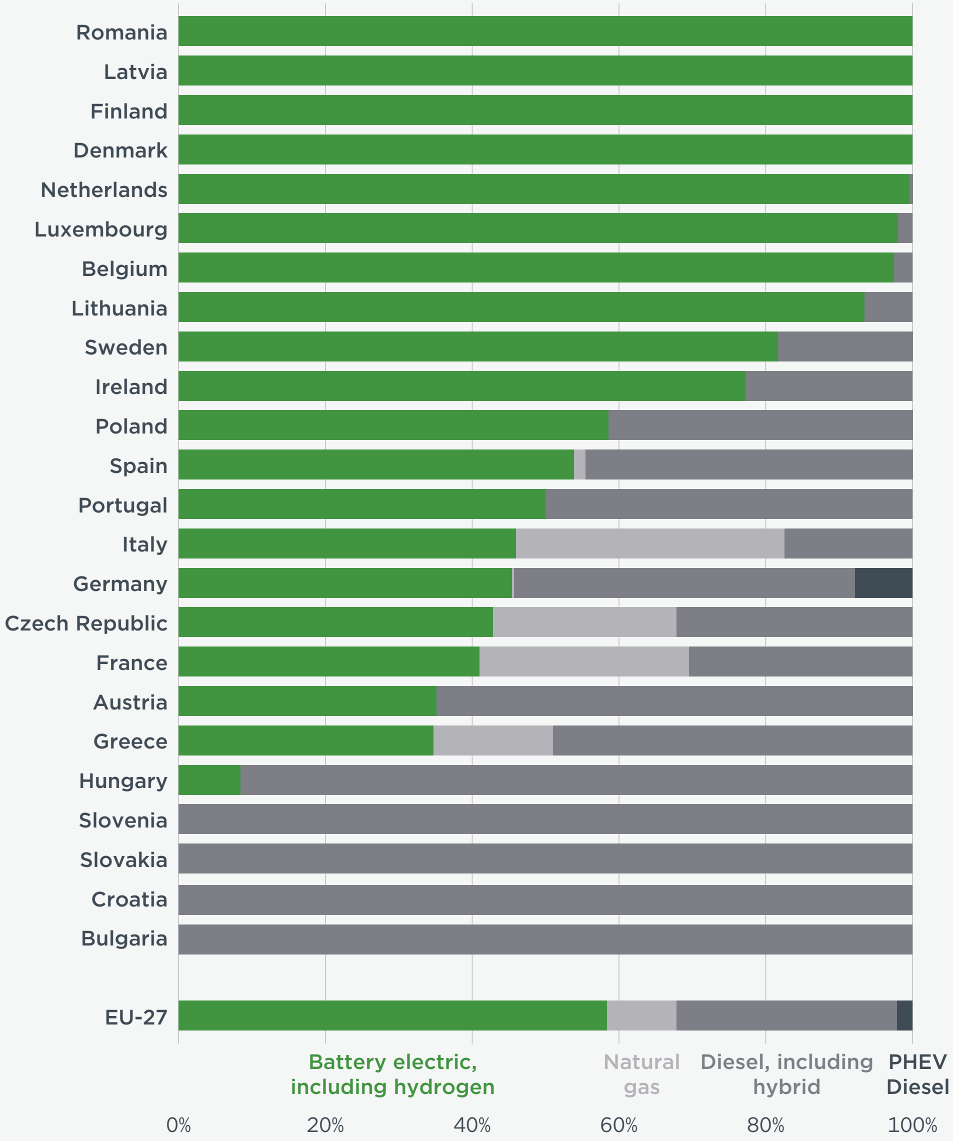

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Figure 4.5
Shares of all buses and coaches by powertrain and manufacturer in Q1–Q2 2025

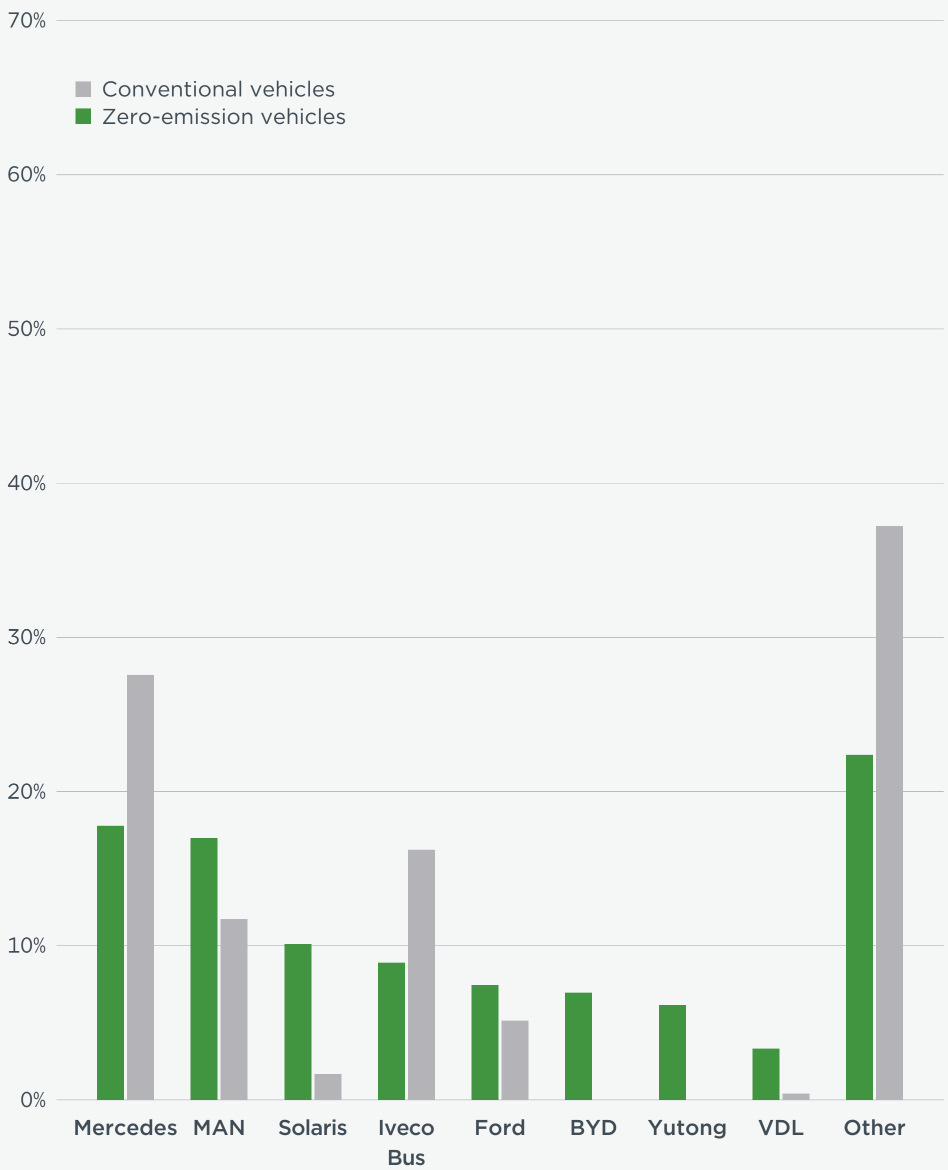

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Table 3
Sales of zero-emission buses and coaches in EU-27 countries. Sales shares are shown in brackets

Country	2024 Q2	2025 Q2	2024 Q1-Q2	2025 Q1-Q2
Austria	35 (12.6%)	23 (9.3%)	41 (6.9%)	61 (11.8%)
Belgium	37 (17.5%)	392 (72.1%)	83 (17.4%)	523 (62.0%)
Croatia	0 (0.0%)	5 (5.3%)	0 (0.0%)	6 (3.6%)
Cyprus	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)
Czech Republic	12 (2.7%)	9 (4.7%)	12 (1.9%)	12 (2.8%)
Denmark	112 (57.4%)	126 (79.2%)	231 (67.3%)	174 (64.2%)
Estonia	16 (26.7%)	0 (0.0%)	17 (15.2%)	0 (0.0%)
Finland	124 (87.3%)	53 (73.6%)	135 (82.8%)	58 (61.1%)
France	292 (20.2%)	160 (12.6%)	424 (15.5%)	308 (11.6%)
Germany	219 (14.2%)	398 (23.7%)	384 (12.2%)	711 (23.7%)
Greece	261 (79.8%)	6 (3.0%)	267 (75.0%)	106 (26.5%)
Hungary	0 (0.0%)	8 (3.5%)	0 (0.0%)	12 (3.7%)
Ireland	166 (52.7%)	9 (4.2%)	227 (34.8%)	18 (3.1%)
Italy	216 (10.8%)	252 (21.2%)	308 (8.5%)	426 (16.6%)
Latvia	6 (7.4%)	21 (75.0%)	10 (6.7%)	31 (58.5%)
Lithuania	3 (4.4%)	58 (51.3%)	4 (3.1%)	97 (43.9%)
Luxembourg	40 (85.1%)	24 (52.2%)	110 (72.8%)	50 (33.1%)
Netherlands	80 (52.6%)	164 (62.8%)	114 (39.3%)	284 (58.8%)
Poland	48 (9.6%)	47 (9.1%)	91 (10.0%)	98 (10.1%)
Portugal	16 (8.3%)	25 (7.4%)	85 (18.2%)	30 (6.1%)
Romania	123 (29.1%)	287 (42.6%)	279 (30.0%)	533 (47.4%)
Slovenia	1 (2.0%)	1 (1.2%)	1 (1.0%)	1 (0.8%)
Spain	42 (3.3%)	66 (6.3%)	115 (4.9%)	108 (5.0%)
Sweden	0 (0.0%)	225 (40.6%)	8 (2.7%)	462 (49.6%)
EU-27	1,849 (18.3%)	2,359 (24.1%)	2,946 (15.6%)	4,109 (22.0%)

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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 any 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 freight vehicle with a gross vehicle weight above 12 tonnes.

A light and medium commercial truck is a freight vehicle 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 7.5 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.

All data are supplied by Dataforce and cover all EU-27 countries, except for Malta.

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