AUGUST 2026

An overview of the global zero-emission medium- and heavy-duty vehicle market

2025 ANNUAL REPORT

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ACKNOWLEDGMENTS

The authors sincerely appreciate the valuable contributions and dedicated efforts of all internal reviewers and colleagues, including Yihao Xie (U.S.), Xuelin Tian (Canada), Anirudh Narla (India), Carlos Bueno (Chile), Thiago Rodrigues (Brazil), Ilse Avalos Vargas (Mexico), Xinran Liu (China), Malo Benoit (EU), Helmer Acevedo (Colombia), and Aditya Mahalana (Indonesia). The authors also extend their sincere gratitude to Amy Smorodin, Kyle Gipson, Tomás Husted, and Valerie Sheckler for their editorial, design, and production support throughout the development of this report. Any remaining errors or omissions are solely the responsibility of the authors.

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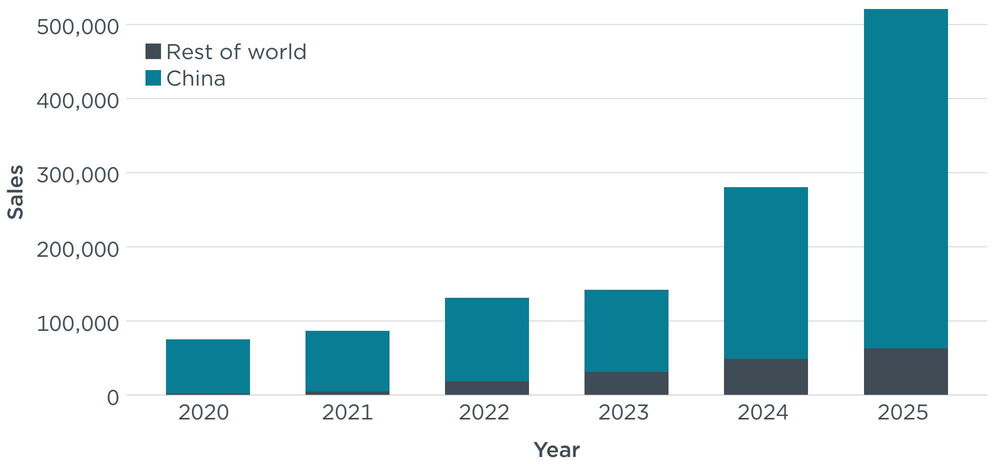
GLOBAL OVERVIEW

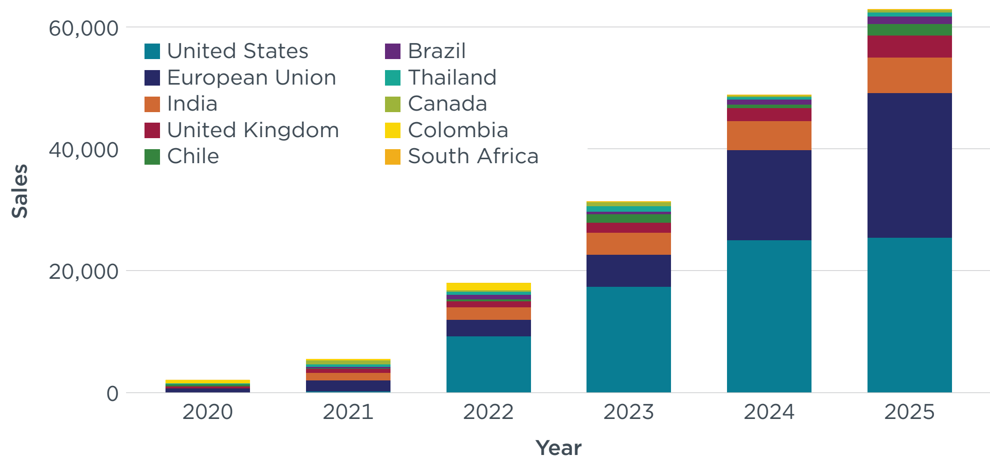
Global zero-emission medium- and heavy-duty vehicle (ZE-MHDV) sales grew considerably from 2020 to 2025, reaching over 520,000 units in 2025. China accounted for about 88% of global sales, though its share has begun to decline as sales in other markets accelerate. Excluding China, global ZE-MHDV sales reached approximately 63,000 units in 2025, led by the United States, the European Union (EU), and India. The United States accounted for about 40% of non-China volumes, driven primarily by medium-duty electric trucks.

The composition of ZE sales varied sharply by country in 2025. China's 457,300 ZE-MHDV sales were dominated by heavy- and medium-duty trucks, with buses contributing just 11% of sales. In the United States, medium-duty trucks accounted for over 90% of ZE-MHDV sales, while buses and heavy-duty trucks each represented about 3–4%. Excluding both China and the United States, the ZE-MHDV market in India and Brazil remained predominantly driven by buses and coaches, which accounted for over half of sales across these regions, while sales of ZE medium- and heavy-duty trucks remained minimal.

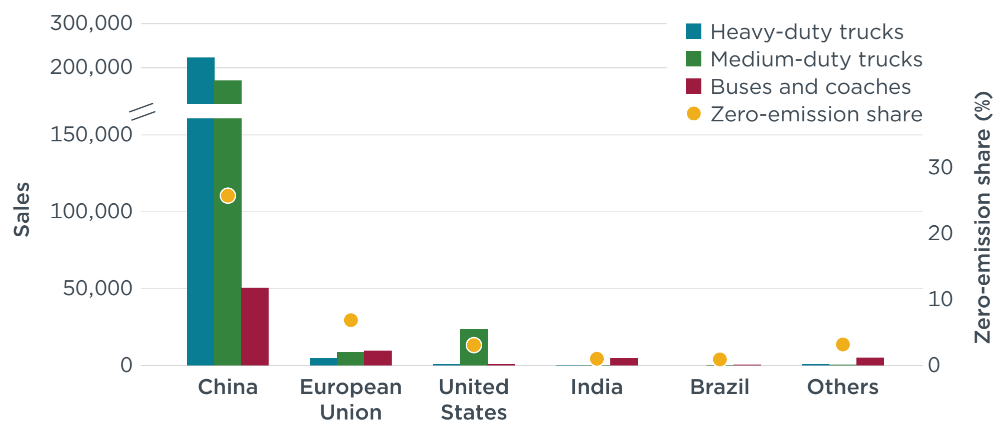
Global ZE-MHDV sales, 2020–2025



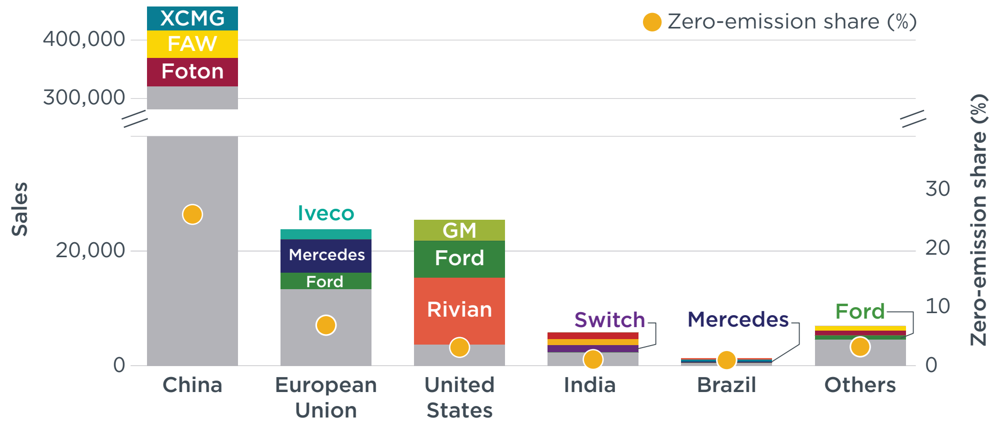
Global ZE-MHDV sales (China excluded), 2020–2025



Global ZE-MHDV sales and market share by category, 2025



Global ZE-MHDV sales by manufacturer, 2025



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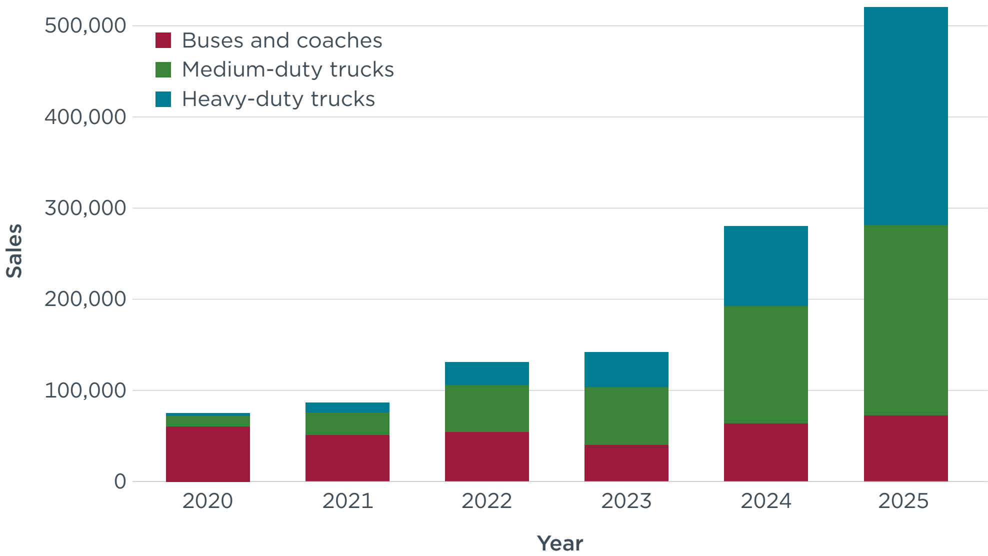
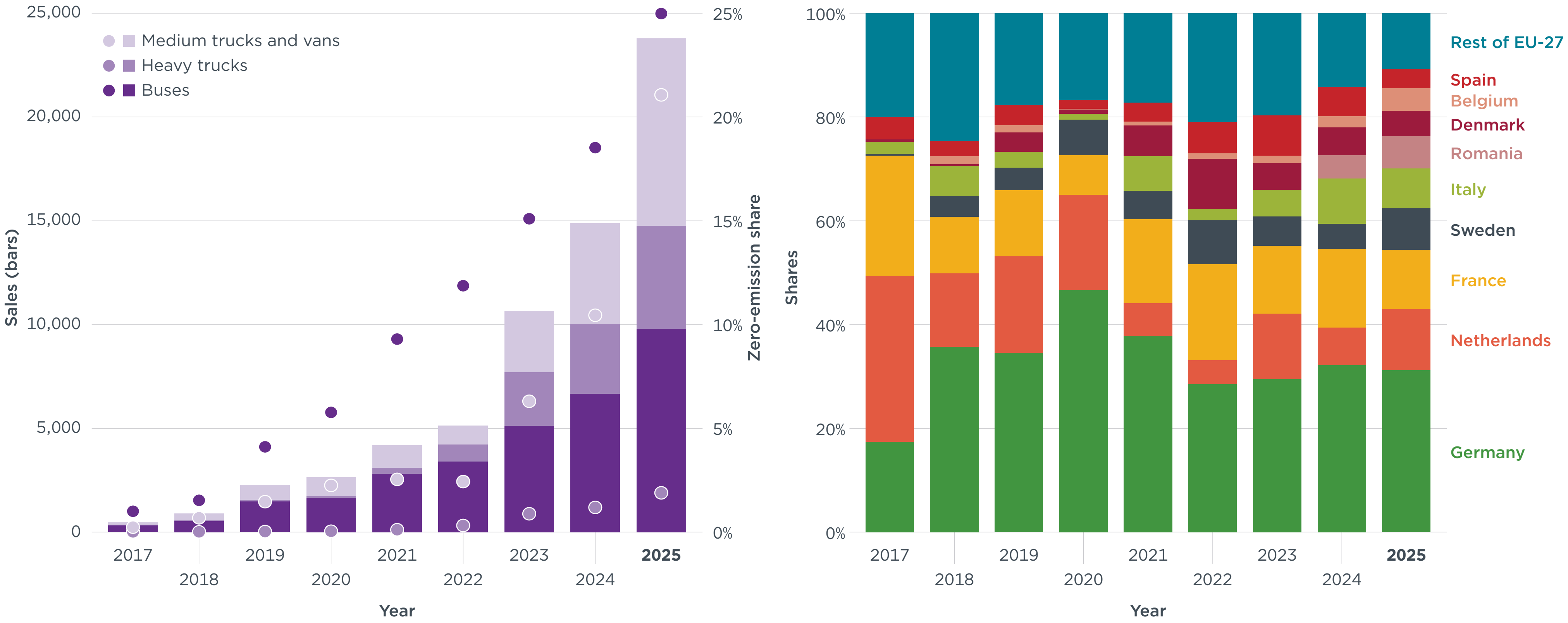
Global ZE-MHDV sales by category, 2020–2025



The vehicle category composition of global ZE-MHDV sales shifted from buses to trucks between 2020 and 2025, driven largely by rapid growth in China's truck categories. Buses and coaches accounted for 80% of ZE-MHDV sales in 2020, reflecting the early concentration of electrification in urban transit. By 2022, combined medium- and heavy-duty truck sales exceeded bus sales for the first time, and the gap widened rapidly thereafter. Heavy-duty truck volumes more than doubled from 2024 to 2025, reaching nearly 240,000 units—making heavy-duty trucks the single largest ZE-MHDV category globally. By 2025, trucks together represented 86% of all ZE-MHDV sales, up from just 20% in 2020.

REGIONAL SPOTLIGHT: EUROPEAN UNION



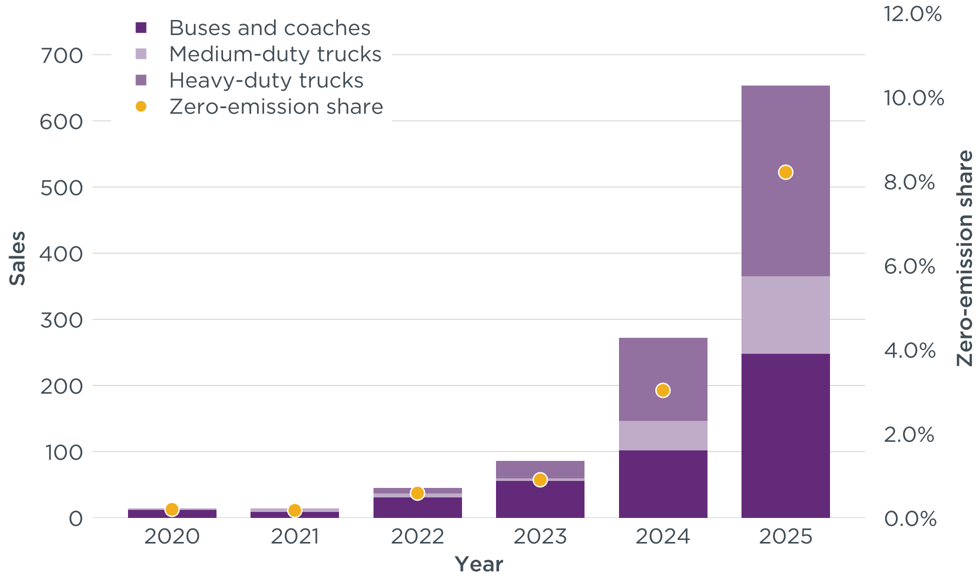
Note: Figure adapted from *Race to Zero: European Heavy-Duty Vehicle Market Development Quarterly (January–December 2025)*, https://theicct.org/publication/r2z-eu-hdv-market-development-quarterly-jan-dec-2025-mar26/.

Over 23,700 new ZE-MHDVs were registered in Europe in 2025. Zero-emission trucks (above 3.5 tonnes) reached a sales share of 4.5% in 2025, up from 2.5% in 2024. Zero-emission buses and coaches also continued to gain market share, increasing from 18.5% in 2024 to 24.8% in 2025.

Sales growth was particularly strong in the ZE medium-duty truck and van segment (3.5–12 tonnes), where the ZE sales share more than doubled from 10.4% in 2024 to 21.0% in 2025. The ZE bus and coach market—still largely driven by ZE city buses—also expanded significantly. The sales share of ZE city buses rose from 45% to 58% between 2024 and 2025, while the sales share of ZE interurban buses and coaches remained stagnant at around 4% across both years.

Manufacturers of MHDVs in the EU must follow increasingly stringent carbon dioxide (CO_2) standards. In 2025, the CO_2 emissions of most new trucks were required to be 15% lower than those of vehicles first registered in 2019. These targets increase to 45% in 2030, 65% in 2035, and 90% in 2040. Sales of ZE-MHDVs have been bolstered by the Eurovignette Directive, which allows EU Member States to exempt ZE trucks from road tolls and requires that distance-based toll systems charge trucks based on their CO_2 emissions. Also boosting sales of ZE-MHDVs, the Clean Vehicles Directive sets ZE targets for public procurement of buses, differentiated by Member State, with ZE targets of up to 22.5% for 2021–2025, increasing to 32.5% for 2026–2030.

AUSTRIA

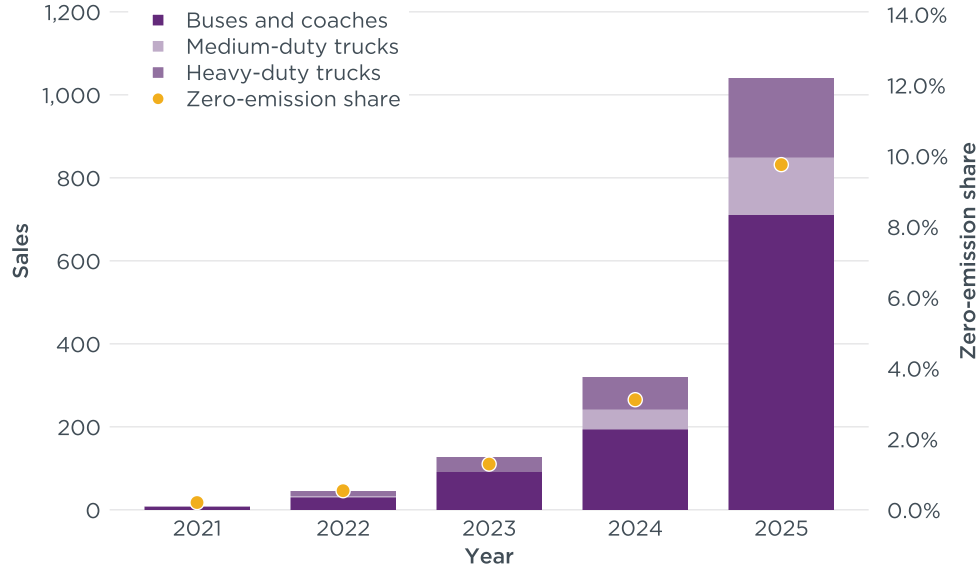


In 2025, ZE vehicles accounted for 8.2% of Austria's MHDV market, with 653 units sold, up from 14 in 2020. By segment—each reported with its own ZE penetration rate—heavy-duty trucks led in ZE sales with 288 units (4.5% ZE share), followed by buses and coaches with 248 units (22.6% ZE share) and medium-duty trucks with 117 units (23.6% ZE share). A 140% year-over-year increase of ZE sales reinforced cumulative growth of 4,564% since 2020.

Until 2024, Austria's Environmental Support Act funded up to 80% of the ZE truck cost differential compared with conventional internal combustion engine (ICE) vehicles.

#	ZE manufacturers	2025 sales	Share	ICE manufacturers	2025 sales	Share
1	**Mercedes**	259	40%	**MAN**	2,084	29%
2	**MAN**	171	26%	**Mercedes**	1,247	17%
3	**Volvo Trucks**	52	8%	**Scania**	1,094	15%

BELGIUM

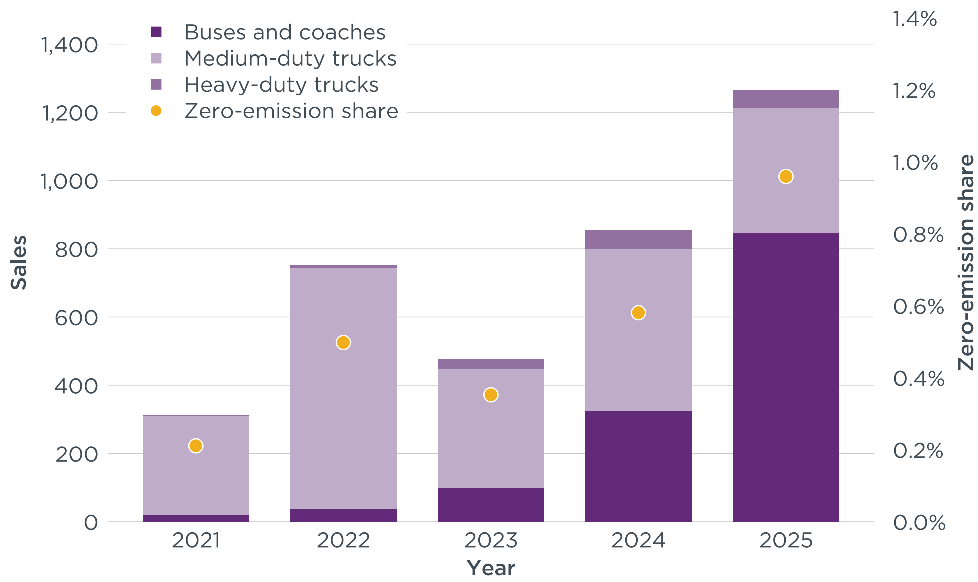


In 2025, 1,040 ZE-MHDVs were sold in Belgium, capturing 9.8% of the total MHDV market. By segment, buses and coaches led with 711 units (48.9% ZE share), followed by heavy-duty trucks at 191 units (2.4% ZE share) and medium-duty trucks at 138 units (11.2% ZE share).

ZE-MHDVs benefit from lower per-kilometer toll charges in Flanders and Brussels. Sales of ZE buses and coaches were supported by the last phase of the EU's Clean Vehicle Directive, which mandated public procurement quotas.

#	ZE manufacturers	2025 sales	Share	ICE manufacturers	2025 sales	Share
1	**Mercedes**	291	28%	**Volvo Trucks**	1,863	19%
2	**Iveco**	214	21%	**Mercedes**	1,580	16%
3	**MAN**	210	20%	**DAF**	1,492	16%

BRAZIL

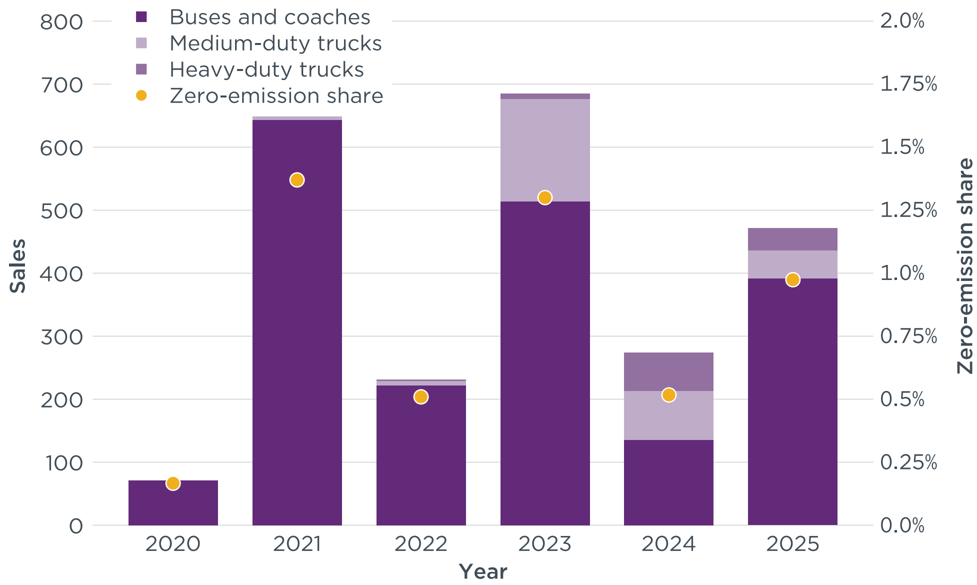


ZE-MHDV sales in Brazil totaled 1,265 units in 2025, representing approximately 1.0% of all MHDV registrations and a cumulative 304% increase since 2021. By segment, buses and coaches led with 846 units (3.5% ZE share), followed by medium-duty trucks at 366 units (2.0% ZE share) and heavy-duty trucks at 53 units (0.06% ZE share). There was a 48% year-over-year increase in ZE sales from 2024, though growth has not been linear. Medium-duty truck sales have been impacted by the gradual reinstatement of electric vehicle import tariffs beginning in 2024.

Brazil's ZE-MHDV growth has been driven primarily by urban buses, supported by federal fleet-renewal initiatives such as Novo PAC Seleções, dedicated financing, and municipal transport decarbonization policies. Truck electrification remains limited. The Green Mobility and Innovation (MOVER) Program is expected to introduce CO_2 emission-reduction targets for new HDVs, but these targets are not expected before 2029.

#	ZE manufacturers	2025 sales	Share	ICE manufacturers	2025 sales	Share
1	**Caio/Eletra**	310	25%	**Mercedes**	37,469	29%
2	**Mercedes**	221	17%	**Volkswagen**	35,777	27%
3	**BYD**	195	15%	**Volvo**	20,600	16%

CANADA

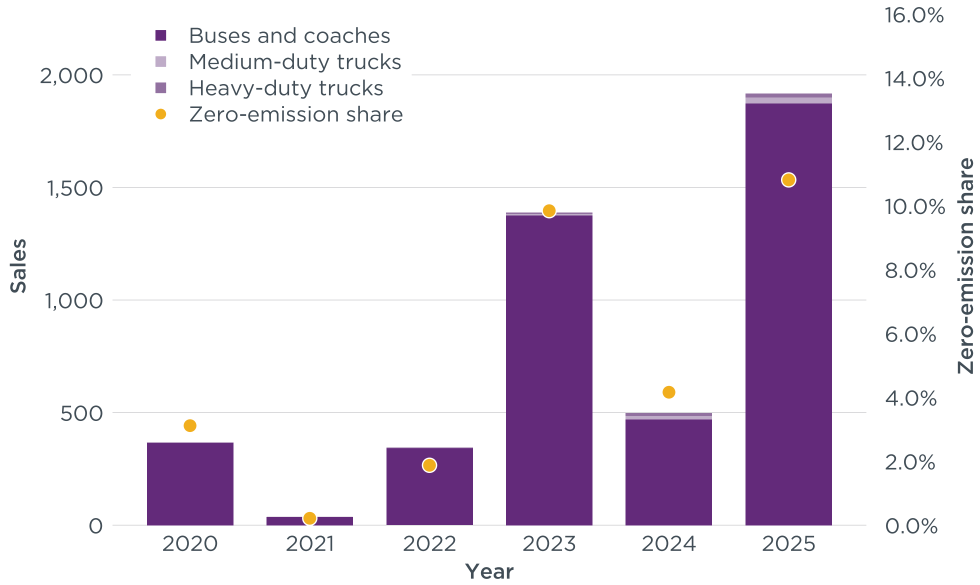


Canada registered 471 ZE-MHDVs in 2025, accounting for about 1.0% of the 47,676 MHDVs registered. By segment, buses and coaches led with 392 units (9.7% ZE share), followed by medium-duty trucks at 44 units (0.2% ZE share) and heavy-duty trucks at 35 units (0.1% ZE share). Annual ZE registrations have varied with no consistent directional trend: 71 in 2020, 648 in 2021, 231 in 2022, 685 in 2023, 274 in 2024, and 471 in 2025.

The federal government targets 35% ZE-MHDV sales by 2030. Canada's Incentives for Medium- and Heavy-Duty Zero-Emission Vehicles program provided purchase incentives of up to $200,000 per vehicle in 2025. Provincial programs offer additional support, including Quebec's Écocamionnage program and British Columbia's programs that allow stacking of federal and provincial rebates.

#	ZE manufacturers	2025 sales	Share	ICE manufacturers	2025 sales	Share
1	**Volvo Trucks**	178	38%	**Mercedes**	12,586	27%
2	**New Flyer**	159	34%	**Ford**	8,042	17%
3	**Mercedes**	32	7%	**Paccar**	7,701	16%

CHILE

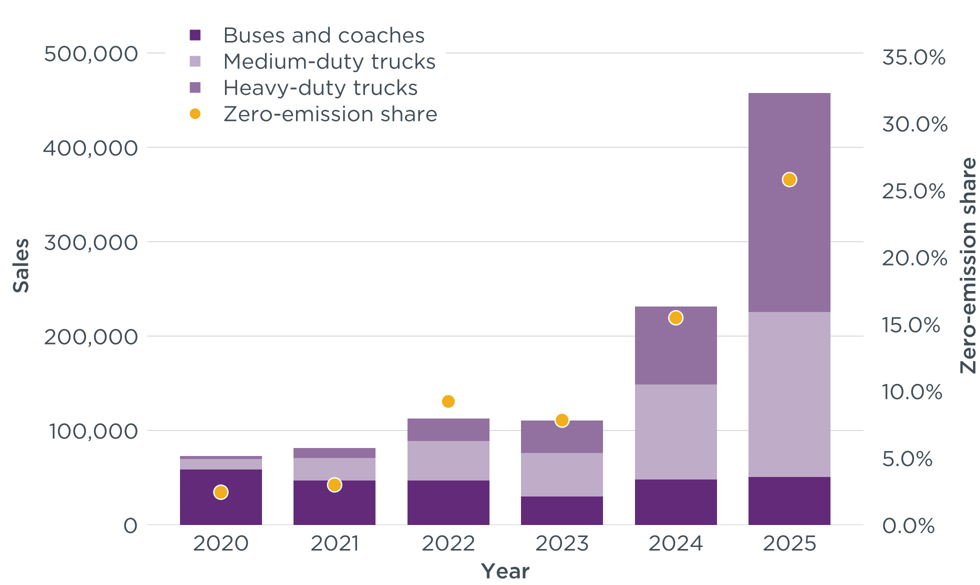


Chile registered a record 1,917 ZE-MHDVs in 2025, representing 10.8% of the 17,732 MHDVs registered, the highest ZE penetration outside of China and the EU. Buses and coaches dominated ZE sales with 1,873 units (45% ZE share). Annual ZE registrations had previously peaked at 1,387 in 2023 before dropping to 498 in 2024, reflecting the nature of bus fleet procurement cycles.

The surge in bus registrations reflects sustained regulatory ambition and targeted incentives. Chile's National Electromobility Strategy targets 100% ZE shares for urban public transport by 2035 and freight and intercity buses by 2045. Santiago operates Latin America's largest electric bus fleet.

#	ZE manufacturers	2025 sales	Share	ICE manufacturers	2025 sales	Share
1	**Sinotruk**	827	43%	**Mercedes**	4,481	28%
2	**King Long**	491	26%	**Volkswagen**	3,674	23%
3	**Yutong**	424	22%	**Volvo Trucks**	2,922	18%

CHINA

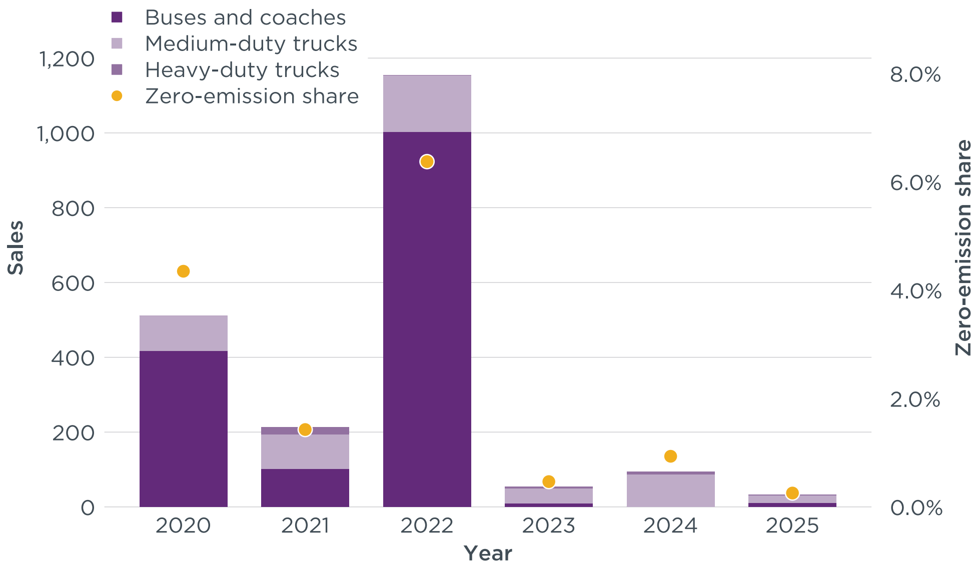


In 2025, China's ZE-MHDV market reached about 457,300 units, equivalent to about 25.8% of total MHDV sales. By segment, heavy-duty trucks led with 232,000 units (28% ZE share), followed by medium-duty trucks at 174,700 units (22% ZE share) and buses and coaches at 50,500 units (29% ZE share, with city buses having an almost 100% ZE share). A 98% year-over-year increase in ZE-MHDV sales lifted cumulative growth to 527% since 2020.

Performance grading and ultra-low emission campaigns have strengthened clean transportation requirements in key industries, while provincial new energy vehicle procurement targets have driven local ZE-MHDV adoption. Charging and battery-swapping infrastructure and battery-swapping standards have further accelerated adoption.

#	ZE manufacturers	2025 sales	Share	ICE manufacturers	2025 sales	Share
1	**Foton**	48,908	11%	**Foton**	226,481	17%
2	**FAW**	47,318	10%	**Sinotruk**	181,796	14%
3	**XCMG**	41,412	9%	**FAW**	171,093	13%

COLOMBIA

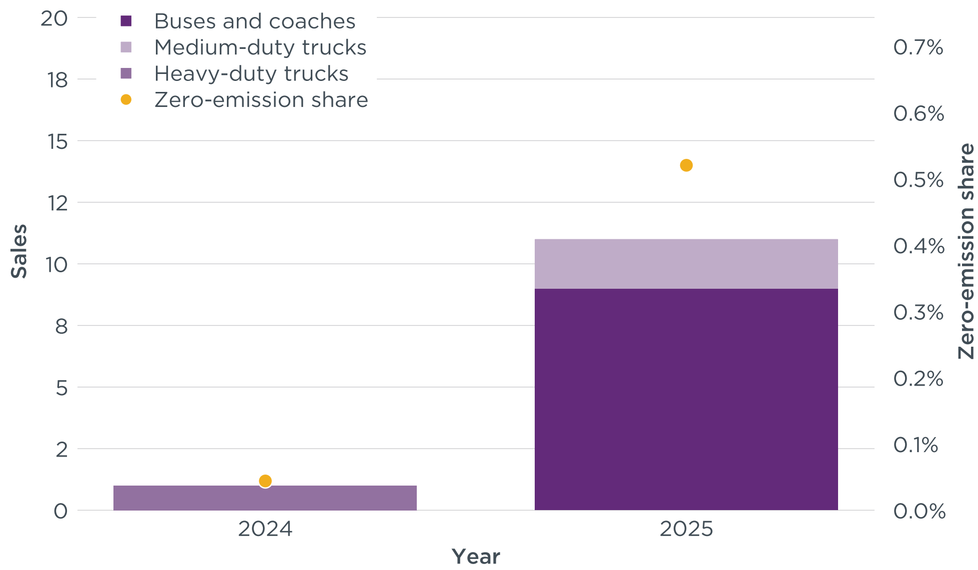


Colombia registered 33 ZE-MHDVs in 2025, accounting for 0.3% of the 12,905 MHDVs registered and down sharply from a peak of 1,154 ZE units registered in 2022. Medium-duty trucks led with 20 units (0.34% ZE share), followed by buses and coaches with 11 units (0.65% ZE share) and heavy-duty trucks with 2 units (0.04% ZE share). The steep decline since 2022 reflects the completion of major electric bus fleet deployments in Bogotá and other cities without new procurement rounds to sustain momentum.

Colombia's electric vehicle law exempts ZE vehicles from import duties and restrictions. Bogotá operates one of the largest municipal electric bus fleets in Latin America, and its bus rapid transit system plans to deploy more than 1,000 urban buses between 2026 and 2027 as part of its fleet renewal program and procurement of additional vehicles to expand service capacity.

#	ZE manufacturers	2025 sales	Share	ICE manufacturers	2025 sales	Share
1	**JAC**	5	15%	**General Motors**	3,351	26%
2	**BYD**	4	12%	**BAIC**	2,371	18%
3	**Changan**	3	9%	**Volkswagen**	1,701	13%

CROATIA

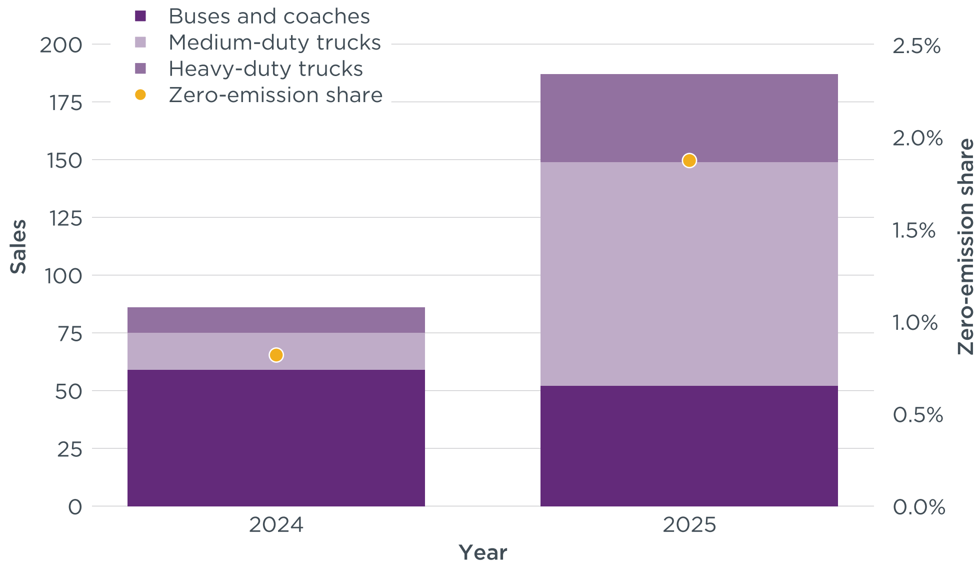


Croatia sold 11 ZE-MHDVs in 2025, capturing 0.5% of its total MHDV market. Buses and coaches dominated the market with 82% of ZE sales (9 units, 3.1% ZE share), while medium-duty trucks accounted for the remainder (2 units, 1.0% ZE share).

Croatia launched a €21.2 million funding call through the Environmental Protection and Energy Efficiency Fund to support companies purchasing battery electric and hydrogen-powered vehicles. The scheme covers up to 40% of vehicle purchase costs (up to €90,000 per applicant) and aims to accelerate transport decarbonization and reduce reliance on fossil fuels.

#	ZE manufacturers	2025 sales	Share	ICE manufacturers	2025 sales	Share
1	**Karsan**	3	27%	**Mercedes**	386	18%
2	**Feniksbus**	2	18%	**MAN**	380	18%
3	**Iveco**	2	18%	**Iveco**	340	16%

CZECHIA

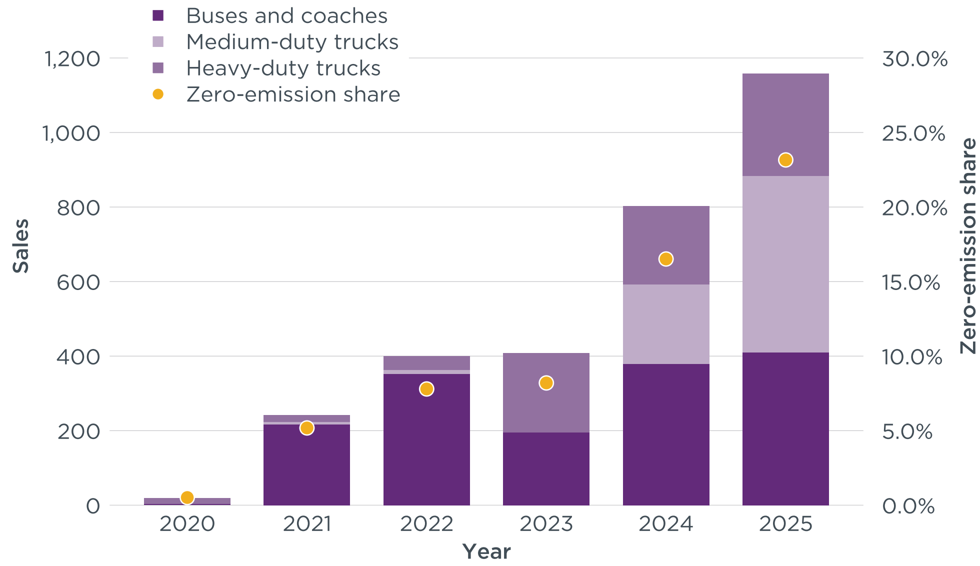


Czechia registered 187 ZE-MHDVs in 2025, a 1.9% ZE penetration rate. By segment, medium-duty trucks led with 97 units (8.7% ZE share), followed by buses and coaches at 52 units (6.4% ZE share) and heavy-duty trucks at 38 units (0.5% ZE share). ZE sales increased by 117% between 2024 and 2025.

Czechia offers subsidies covering 30% of the price differential between ZE and equivalent ICE trucks for category N2 and N3 ZE trucks, with 80% of the €38 million budget earmarked for N3 trucks. At the local level, Prague targets a 75% ZE bus fleet by 2030.

#	ZE manufacturers	2025 sales	Share	ICE manufacturers	2025 sales	Share
1	Mercedes	69	37%	Mercedes	2,099	21%
2	Toyota	20	11%	MAN	1,516	15%
3	Sor	18	10%	Volvo Trucks	1,395	14%

DENMARK

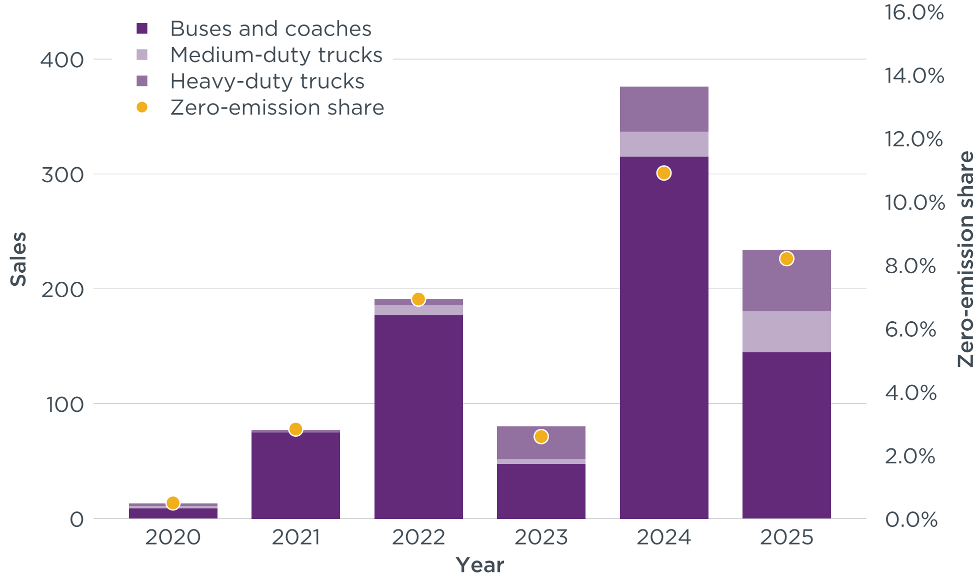


In Denmark, 1,158 ZE-MHDVs were registered in 2025, a 23.2% penetration rate. By segment, medium-duty trucks led with 473 units (62.2% ZE share), followed by buses and coaches at 410 units (71.6% ZE share) and heavy-duty trucks at 275 units (7.5% ZE share). A 44% year-over-year increase in ZE-MHDV sales lifted cumulative growth to 5,995% since 2020. Mercedes has established a commanding position in Denmark's ZE-MHDV market with 488 sales in 2025.

Denmark allocated DKK 700 million (~€93.6 million) to green transition and efficiency improvements in 2024, providing a direct financial incentive for fleet operators. In December 2024, Denmark also authorized municipalities to establish zero-emission zones.

#	ZE manufacturers	2025 sales	Share	ICE manufacturers	2025 sales	Share
1	Mercedes	488	42%	Scania	1,218	32%
2	BYD	230	20%	Volvo Trucks	1,022	27%
3	Volvo Trucks	85	7%	Mercedes	676	18%

FINLAND

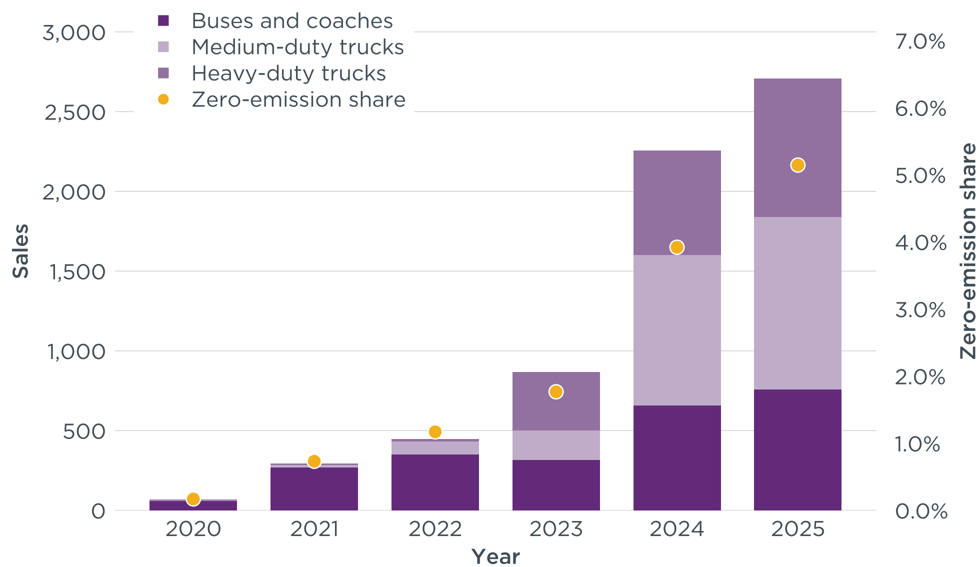


In Finland, 234 ZE-MHDVs were registered in 2025, an 8.2% ZE penetration rate, and an increase from 13 units registered in 2020. By segment, buses and coaches led with 145 units (63.0% ZE share), followed by heavy-duty trucks at 53 units (2.5% ZE share) and medium-duty trucks at 36 units (7.3% ZE share). Although there was a 38% year-over-year decrease compared with 2024, ZE-MHDVs achieved a cumulative growth of 1,700% between 2020 and 2025.

Finland, which targets carbon neutrality by 2035, introduced a purchase subsidy for ZE trucks in 2022, covering up to €50,000 of the cost per vehicle.

#	ZE manufacturers	2025 sales	Share	ICE manufacturers	2025 sales	Share
1	Yutong	120	51%	Scania	874	33%
2	Mercedes	45	19%	Volvo Trucks	838	32%
3	Volvo Trucks	17	7%	Mercedes	422	16%

FRANCE

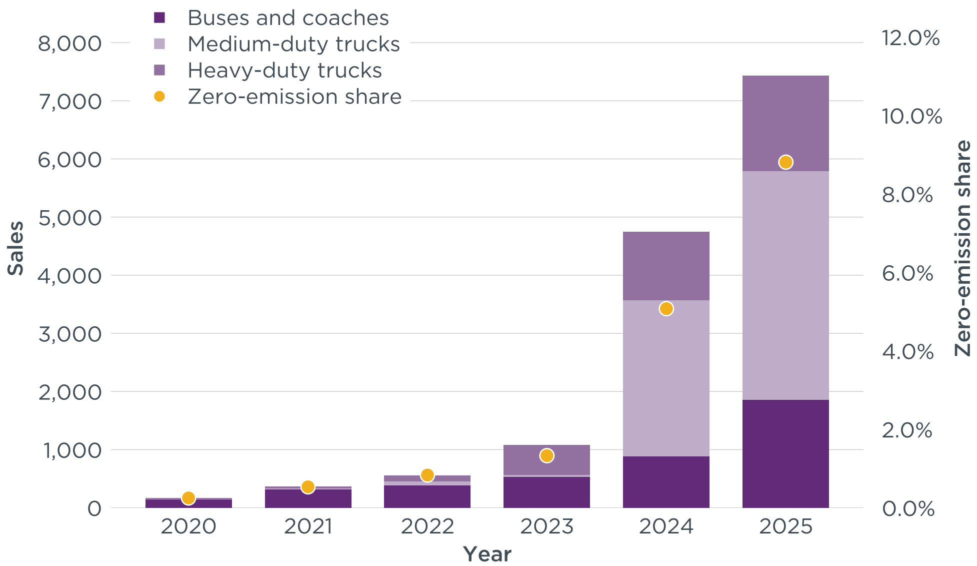


In 2025, ZE vehicles accounted for 5.1% of France's MHDV market, with 2,706 units sold. By segment, medium-duty trucks led with 1,083 units (19.5% ZE share), followed by heavy-duty trucks at 866 units (2.1% ZE share) and buses and coaches at 757 units (12.5% ZE share). With a 20% year-over-year increase logged in 2025, the ZE-MHDV market grew 4,000% between 2020 and 2025.

An increase in funding under the national energy efficiency obligation scheme (CEE), effective June 2026, provides financial incentives exceeding €100,000 for battery-electric truck adoption, with the highest amounts contingent on vehicles being manufactured in the EU. Corridor charging infrastructure along major routes supports long-haul ZE truck operations.

#	ZE manufacturers	2025 sales	Share	ICE manufacturers	2025 sales	Share
1	Renault Trucks	638	24%	Renault Trucks	12,805	26%
2	Ford	363	13%	Mercedes	6,578	13%
3	Mercedes	354	13%	Scania	6,110	12%

GERMANY

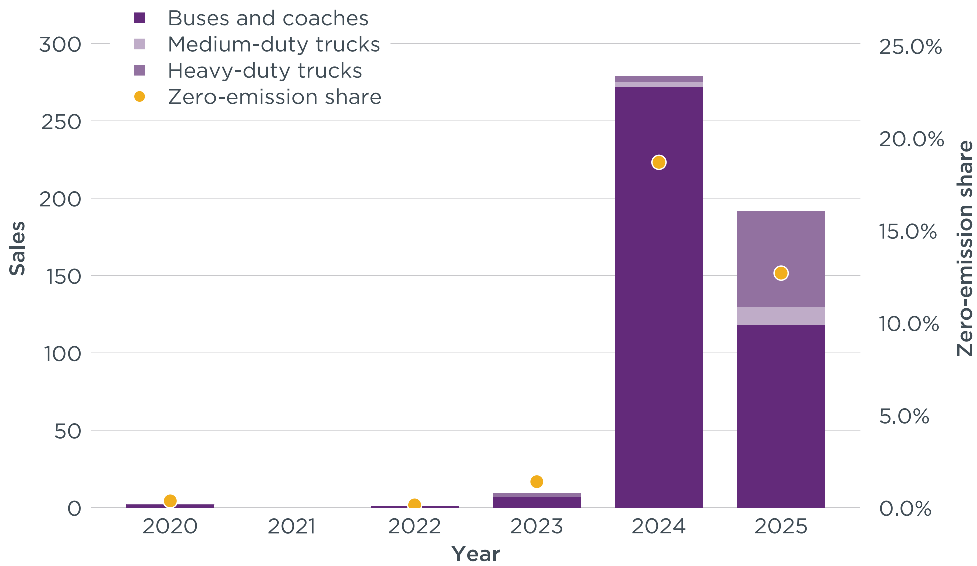


Germany registered 7,430 ZE-MHDVs in 2025, capturing 8.8% of its total MHDV market. By segment, medium-duty trucks led with 3,934 units (26.9% ZE share), followed by buses and coaches at 1,859 units (27.2% ZE share) and heavy-duty trucks at 1,637 units (2.6% ZE share). With a 56% year-over-year increase, annual ZE-MHDV sales grew about 4,500% between 2020 and 2025.

Germany operated one of Europe's most generous ZE truck purchase subsidies until 2024, covering up to 80% of the vehicle price differential compared with a diesel truck. In addition, Germany's CO_2-based truck toll exempts ZE trucks.

#	ZE manufacturers	2025 sales	Share	ICE manufacturers	2025 sales	Share
1	Mercedes	2,581	35%	Mercedes	23,144	30%
2	Ford	1,274	17%	MAN	20,257	26%
3	Iveco	979	13%	Scania	7,204	9%

GREECE



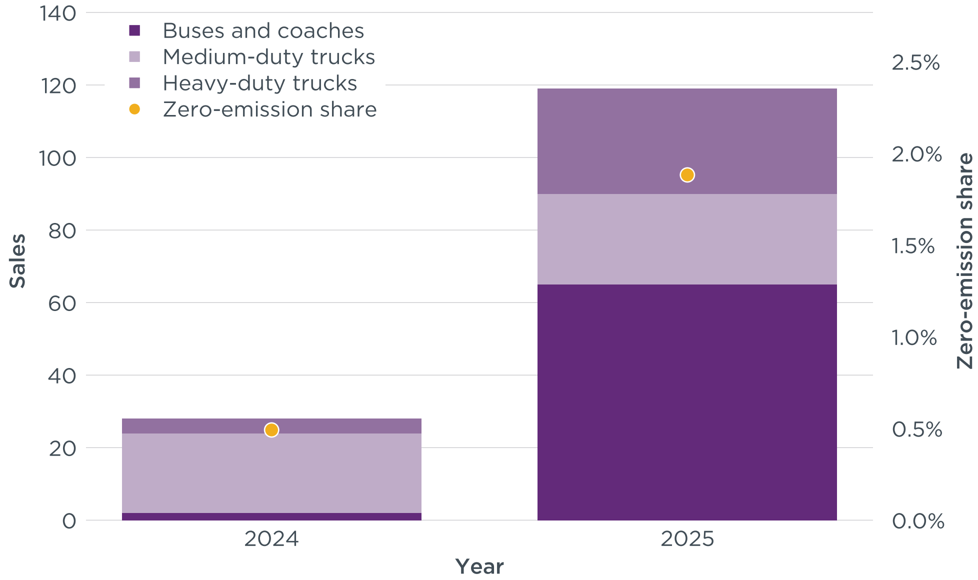
Note: There were no ZE-MHDV sales in 2021.

ZE-MHDV sales in Greece totaled 192 units in 2025, representing 12.7% of all MHDV registrations, up from 2 registrations in 2020. By segment, buses and coaches led with 118 units (17.4% ZE share), followed by heavy-duty trucks at 62 units (12.8% ZE share) and medium-duty trucks at 12 units (3.4% ZE share). ZE-MHDV sales declined 31% year-over-year between 2024 and 2025.

Greece depends heavily on the used MHDV market, with a low number of new vehicle purchases. The country's Recovery and Resilience Plan funds electric bus procurement and charging infrastructure.

#	ZE manufacturers	2025 sales	Share	ICE manufacturers	2025 sales	Share
1	Yutong	101	53%	Mercedes	439	33%
2	Mitsubishi Fuso	51	27%	MAN	255	19%
3	Volvo Trucks	14	7%	Volvo Trucks	116	9%

HUNGARY

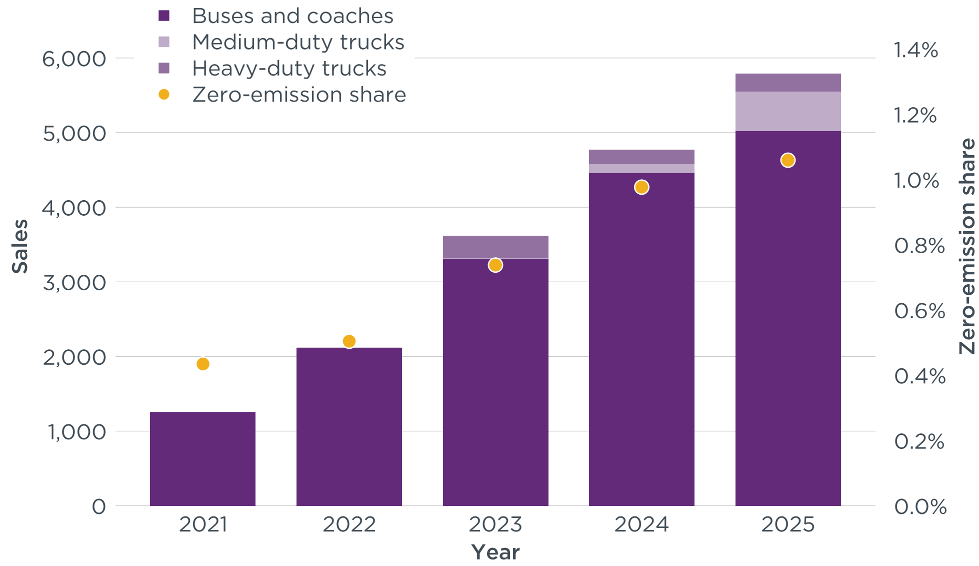


With 119 registrations in 2025, Hungary's ZE-MHDV market accounted for 1.9% of all MHDV sales. By segment, buses and coaches led with 65 units (6.7% ZE share), followed by heavy-duty trucks at 29 units (0.6% ZE share) and medium-duty trucks at 25 units (8.1% ZE share). ZE-MHDV sales increased by 325% between 2024 and 2025.

Hungary offers purchase subsidies to companies for battery electric vehicles: €9,500 per vehicle for N2 and M2 vehicles with batteries up to 49 kWh, €10,000 for those with 49–74 kWh batteries, and €10,500 for those with batteries of 74 kWh or more. EU funds also support electric bus deployment.

#	ZE manufacturers	2025 sales	Share	ICE manufacturers	2025 sales	Share
1	**BYD**	39	33%	**Volvo Trucks**	1,153	19%
2	**Ford**	12	10%	**DAF**	968	16%
3	**Volvo Trucks**	10	8%	**Scania**	964	16%

INDIA

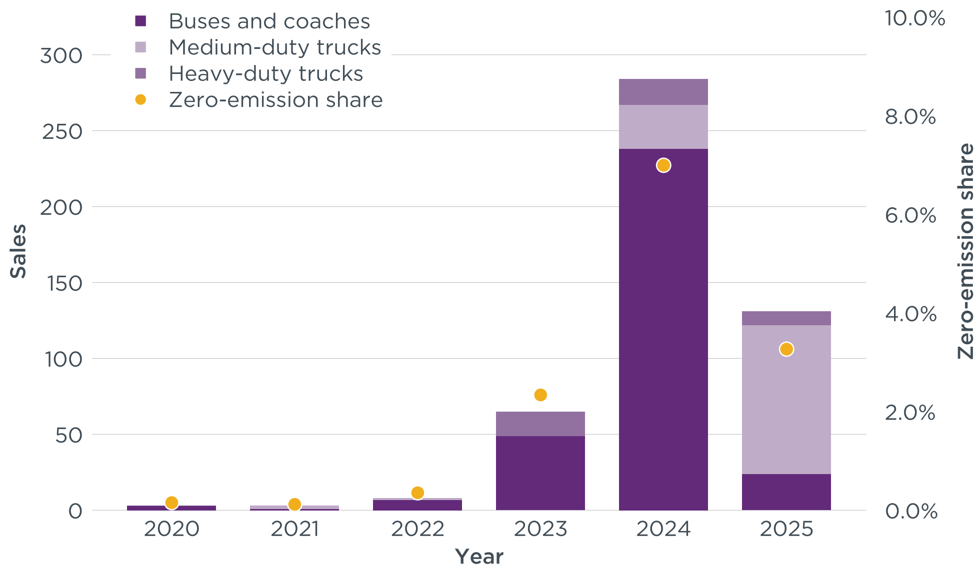


With 5,788 units sold in 2025, ZE-MHDVs in India reached a 1.1% market share. Buses and coaches accounted for the vast majority (87%) of ZE sales (5,021 units, 4.4% ZE share within the segment), with heavy-duty trucks (239 units, 0.3% ZE share) and medium-duty trucks (528 units, 0.1% ZE share) making up the balance. Sales in 2025 increased 21% year-over-year, and the overall ZE-MHDV market grew from 1,254 units in 2021, a 362% cumulative increase.

India's PM E-DRIVE scheme subsidizes electric bus and truck purchases. At the state level, electric vehicle policies include purchase incentives and registration fee exemptions. The rising share of ZE buses can also be attributed to demand aggregation schemes like the PM-eBus Sewa and the National Electric Bus Program.

#	ZE manufacturers	2025 sales	Share	ICE manufacturers	2025 sales	Share
1	**Switch Mobility**	1,219	21%	**Tata**	212,534	39%
2	**Olectra**	1,117	19%	**Ashok Leyland**	125,139	23%
3	**JBM**	1,079	19%	**Eicher**	87,988	16%

IRELAND

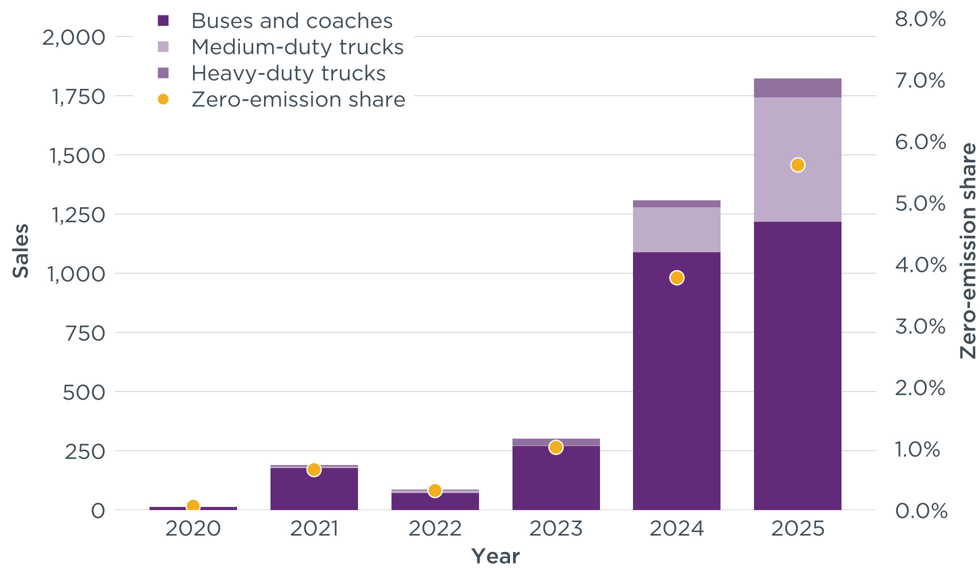


Ireland registered 131 ZE-MHDVs in 2025, representing 3.3% of its total MHDV market and an increase from 3 registrations in 2020. By segment, medium-duty trucks led with 98 units (15.9% ZE share), followed by buses and coaches at 24 units (2.7% ZE share) and heavy-duty trucks at 9 units (0.4% ZE share). There was a 54% year-over-year decrease in total ZE-MHDV registrations from 2024.

Ireland's Climate Action Plan targets a 100% ZE public transport fleet by the mid-2030s, while Transport Infrastructure Ireland offers a ZE-MHDV purchase grant covering up to 60% of the ZE-to-diesel price gap for small enterprises (capped at €500,000 per company per year) and a depot charger grant of up to €300,000. The Sustainable Energy Authority of Ireland provides a fleet assessor grant of up to €8,000, although just €12,000 of the €1 million HDV charging infrastructure fund has been disbursed.

#	ZE manufacturers	2025 sales	Share	ICE manufacturers	2025 sales	Share
1	**Ford**	40	31%	Scania	767	20%
2	**Renault Trucks**	26	20%	Volvo Trucks	605	16%
3	**Mitsubishi Fuso**	22	17%	Mercedes	528	14%

ITALY

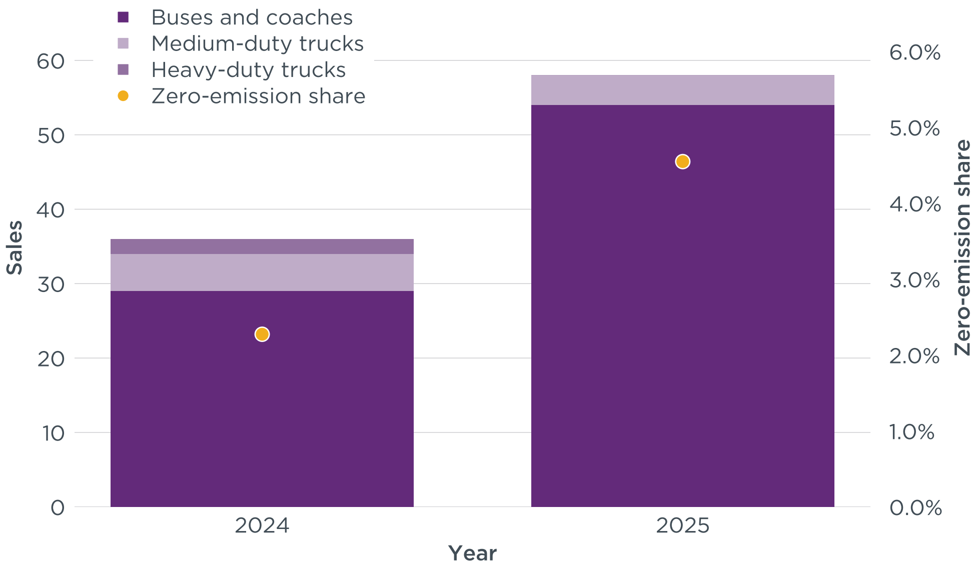


In Italy, 1,822 ZE-MHDVs were sold in 2025, representing a 5.6% ZE-MHDV market share and an increase from 12 units sold in 2020. By segment, buses and coaches led with 1,217 units (24.5% ZE share), followed by medium-duty trucks at 525 units (15.7% ZE share) and heavy-duty trucks at 80 units (0.3% ZE share).

Italy allocated €8 million to freight operators in 2025 for ZE vehicle purchases. In addition, the National Recovery and Resilience Plan funds electric bus procurement and charging infrastructure.

#	ZE manufacturers	2025 sales	Share	ICE manufacturers	2025 sales	Share
1	**Iveco**	347	19%	Iveco	8,848	29%
2	**Fiat**	311	17%	Mercedes	3,861	13%
3	**Solaris**	161	9%	Scania	3,604	12%

LATVIA

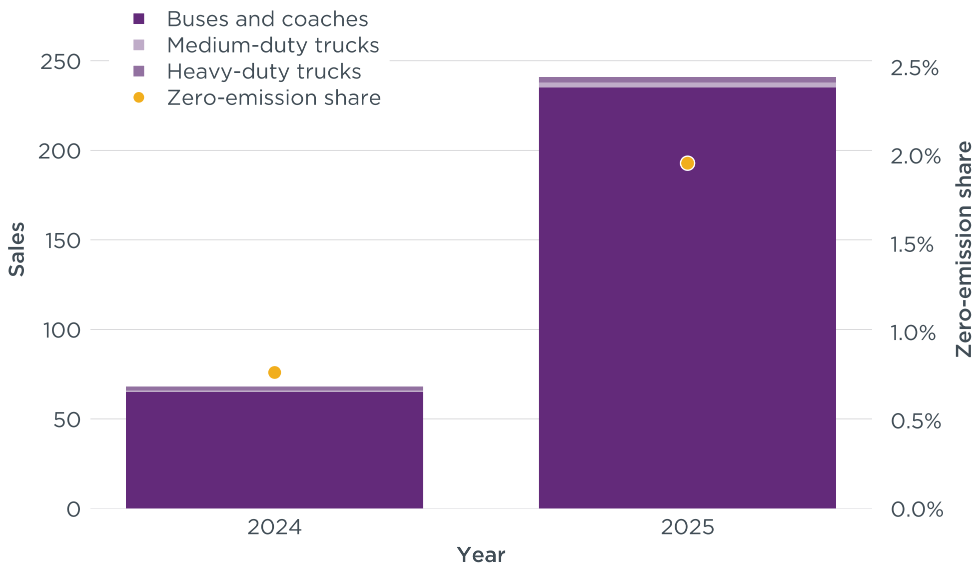


In 2025, ZE vehicles accounted for 4.5% of Latvia's MHDV market, with 58 units sold. Buses and coaches comprised the majority of ZE-MHDV sales with 54 units (40.9% ZE share), while medium-duty trucks accounted for the remaining 4 units (12.5% ZE share). ZE-MHDV sales increased 61% year-over-year from 2024. Solaris captured the largest share of Latvia's ZE-MHDV market.

As of 2025, Lativa had offered limited ZE-MHDV-specific incentives. However, EU funds support electric bus procurement in Riga.

#	ZE manufacturers	2025 sales	Share	ICE manufacturers	2025 sales	Share
1	Solaris	17	29%	Volvo Trucks	485	40%
2	Mercedes	15	26%	Scania	303	25%
3	Iveco	7	12%	DAF	173	14%

LITHUANIA

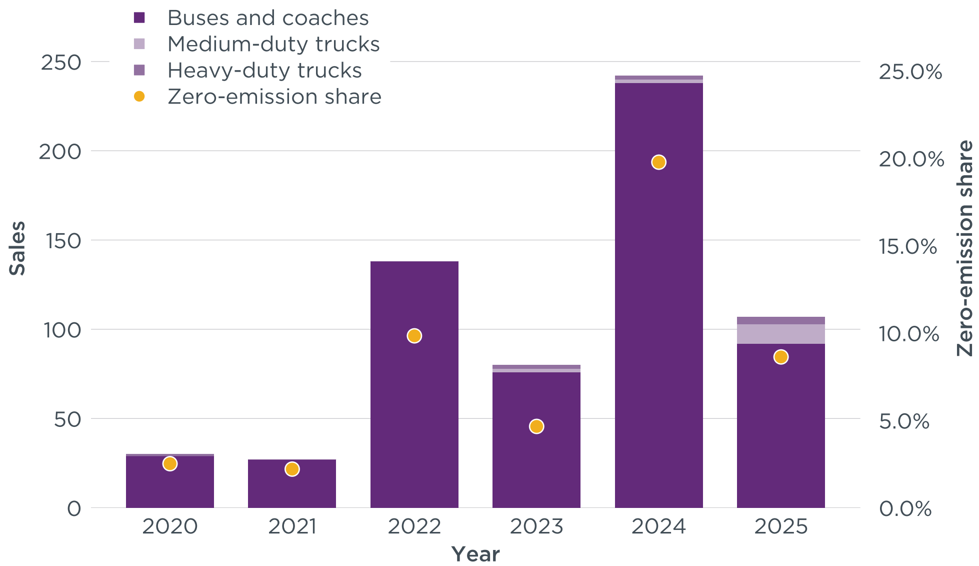


In Lithuania, 241 ZE-MHDVs were registered in 2025, a 2.0% penetration rate. Buses and coaches accounted for the vast majority of ZE sales (235 units, 45.1% ZE share), with medium-duty trucks (3 units, 2.9% ZE share) and heavy-duty trucks (3 units, 0.1% ZE share) making up the balance.

As of 2025, Lithuania had limited incentive programs specifically for ZE-MHDVs.

#	ZE manufacturers	2025 sales	Share	ICE manufacturers	2025 sales	Share
1	King Long	63	26%	Volvo Trucks	5,058	42%
2	Irizar	36	15%	Mercedes	2,427	20%
3	Skoda	36	15%	Scania	1,661	14%

LUXEMBOURG

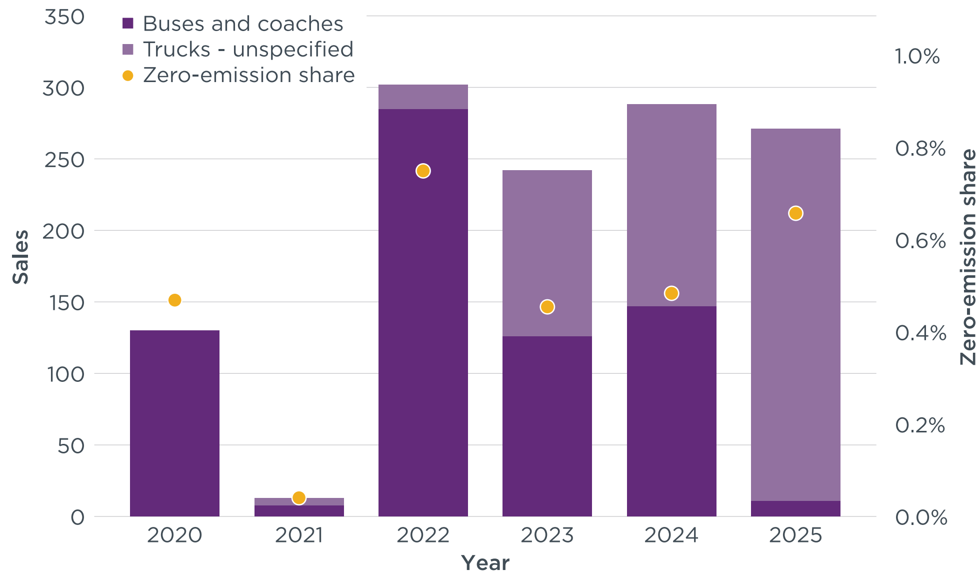


In 2025, ZE vehicles accounted for 8.6% of Luxembourg's MHDV market, with 107 units sold. Buses and coaches dominated ZE sales (92 units, 35.9% ZE share), with medium-duty trucks (11 units, 12.5% ZE share) and heavy-duty trucks (4 units, 0.4% ZE share) making up the balance. Though there was a 56% year-over-year decrease in sales from 2024, cumulative growth reached 256% since 2020, when there were 30 ZE-MHDV sales.

Luxembourg covers up to 60% of the ZE vehicle purchase price differential through the Klima-Agence subsidy program. Luxembourg offers two charging infrastructure support schemes: a simplified small and medium-sized enterprises scheme covering up to 50% of charger costs (capped at €40,000) and 60% of grid connection costs (capped at €60,000), and a competitive call-for-projects scheme in 2026 with aid rates of 30%–50% for AC chargers and 50%–70% for HDV chargers, depending on the degree of public accessibility.

#	ZE manufacturers	2025 sales	Share	ICE manufacturers	2025 sales	Share
1	**Mercedes**	47	44%	**Mercedes**	250	22%
2	**MAN**	17	16%	**Volvo Trucks**	223	20%
3	**Volvo Trucks**	15	14%	**MAN**	189	17%

MEXICO

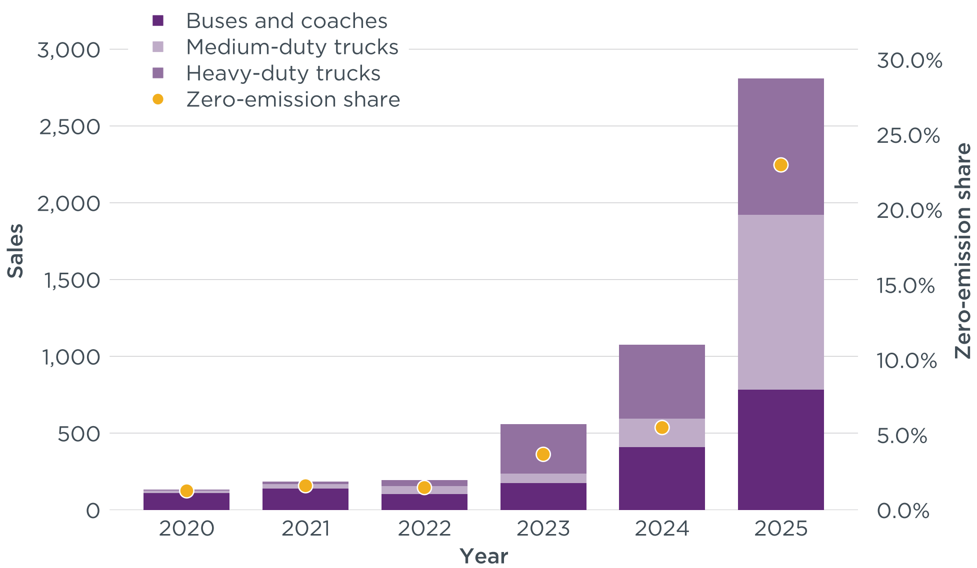


Mexico registered 271 ZE-MHDVs in 2025, representing 0.7% of the country's MHDV sales and an increase of 108% from 130 ZE sales in 2020. Trucks dominated the market at 96% of ZE sales (260 units, 0.8% ZE share), while buses and coaches accounted for the remainder (11 units, 0.2% ZE share). ZE-MHDV sales dropped 6% year-over-year between 2024 and 2025.

Mexico has signed the Global MoU on Zero-Emission MHDVs, committing to a 30% ZE share of new vehicle sales by 2030 and 100% by 2040. The Plan México Decree, published in 2025, established an 86% immediate tax deduction for new electric, hybrid, and hydrogen vehicles (including HDVs) with no restriction on country of origin. In March 2026, the Renuévame el Tráiler program extended this benefit to HDVs of all powertrain types for new HDVs produced or assembled in Mexico, expanding eligibility beyond ZE vehicles.

#	ZE manufacturers	2025 sales	Share	ICE manufacturers	2025 sales	Share
1	**JAC**	206	76%	**Kenworth**	9,215	23%
2	**Foton**	26	10%	**Freightliner**	8,337	20%
3	**Auteco**	23	8%	**International**	7,278	18%

NETHERLANDS

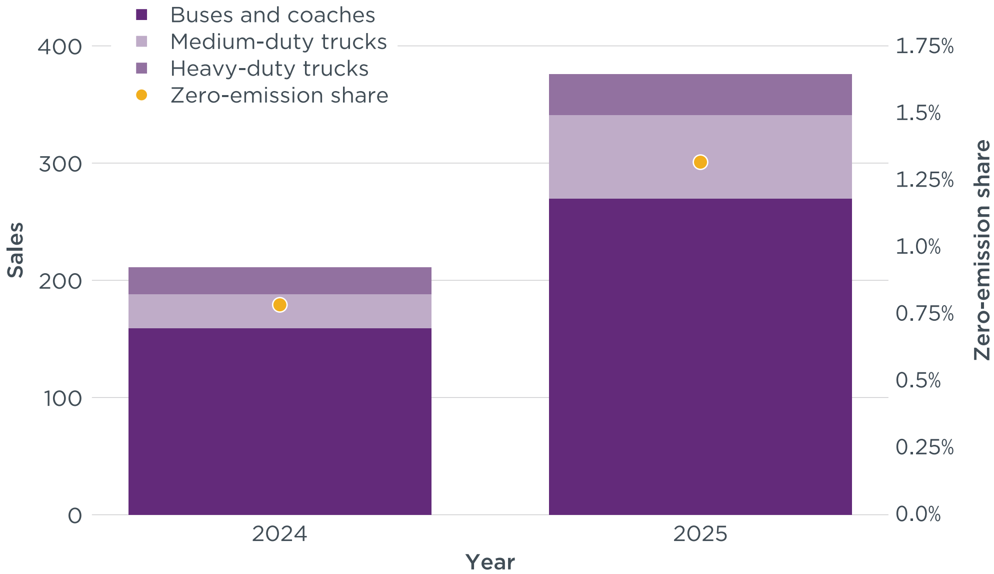


In the Netherlands, 2,808 ZE-MHDVs were sold in 2025, amounting to a 23.0% ZE-MHDV market share and an increase from 130 units sold in 2020. By segment, medium-duty trucks led with 1,137 units (72.1% ZE share), followed by heavy-duty trucks at 887 units (9.3% ZE share) and buses and coaches at 784 units (71.9% ZE share). ZE-MHDV sales increased 162% year-over-year from 2024.

The Netherlands has introduced the world's first citywide urban freight ZE mandate, with 18 zero-emission freight zones in operation as of January 2025, with expansion to 29 zones planned by 2030. This has driven a surge in electric truck registrations. This mandate was complemented by the AanZET purchase subsidy, covering up to 29% of a ZE truck's net purchase price, and HDV charging infrastructure subsidies.

#	ZE manufacturers	2025 sales	Share	ICE manufacturers	2025 sales	Share
1	**Mercedes**	630	22%	**DAF**	2,406	26%
2	**Volvo Trucks**	295	11%	**Scania**	2,025	22%
3	**Yutong**	217	8%	**Volvo Trucks**	1,935	21%

POLAND

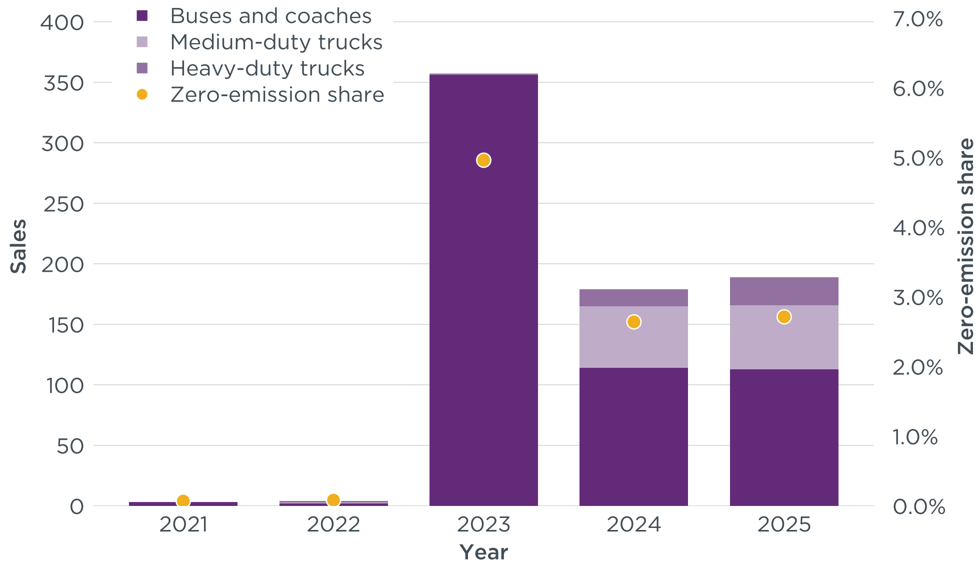


Poland registered 376 ZE-MHDVs in 2025, equivalent to 1.3% of the country's MHDV sales. By segment, buses and coaches led with 270 units (12.6% ZE share), followed by medium-duty trucks at 71 units (3.5% ZE share) and heavy-duty trucks at 35 units (0.1% ZE share). There was a 78% year-over-year increase in ZE-MHDV registrations from 2024.

Poland's flagship ZE-MHDV subsidy program, NFOŚiGW, covers up to 60% of the price gap between ICE and ZE trucks for small companies—capped at zł 400,000 (~€92,800) and zł 750,000 (~€174,000) for N2 and N3 vehicles, respectively—and includes a scrappage requirement. In parallel, zł 2 billion (~€0.46 billion) is available to fund publicly accessible heavy-duty charging infrastructure (up to 100% of eligible costs), targeting 550 stations along the Trans-European Transport (TEN-T) network, while a November 2024 law mandates Clean Transport Zones in all Polish cities above 100,000 residents.

#	ZE manufacturers	2025 sales	Share	ICE manufacturers	2025 sales	Share
1	**Solaris**	165	44%	**Volvo Trucks**	5,398	19%
2	**Mercedes**	82	22%	**Scania**	5,315	18%
3	**MAN**	16	4%	**MAN**	4,714	16%

PORTUGAL



In 2025, Portugal's ZE-MHDV market reached 189 units, equivalent to 2.7% of total MHDV sales and an increase from 3 units in 2021. By segment, buses and coaches led with 113 units (12.0% ZE share), followed by medium-duty trucks at 53 units (9.7% ZE share) and heavy-duty trucks at 23 units (0.4% ZE share).

Portugal offers few purchase subsidies for ZE trucks, while ZE buses are a major priority. In January 2025, the government approved €90 million under the PRR Recovery Plan to fund 413 ZE buses and 184 charging points across 11 operators in Lisbon, Porto, Braga, Guimarães, Coimbra, and other cities—doubling continental Portugal's ZE bus fleet—following an earlier €48 million PRR program targeting the Lisbon and Porto metropolitan areas.

#	ZE manufacturers	2025 sales	Share	ICE manufacturers	2025 sales	Share
1	**Yutong**	57	30%	**Volvo Trucks**	1,430	21%
2	**Karsan**	23	12%	**Mercedes**	1,005	15%
3	**Ford**	15	8%	**MAN**	888	13%

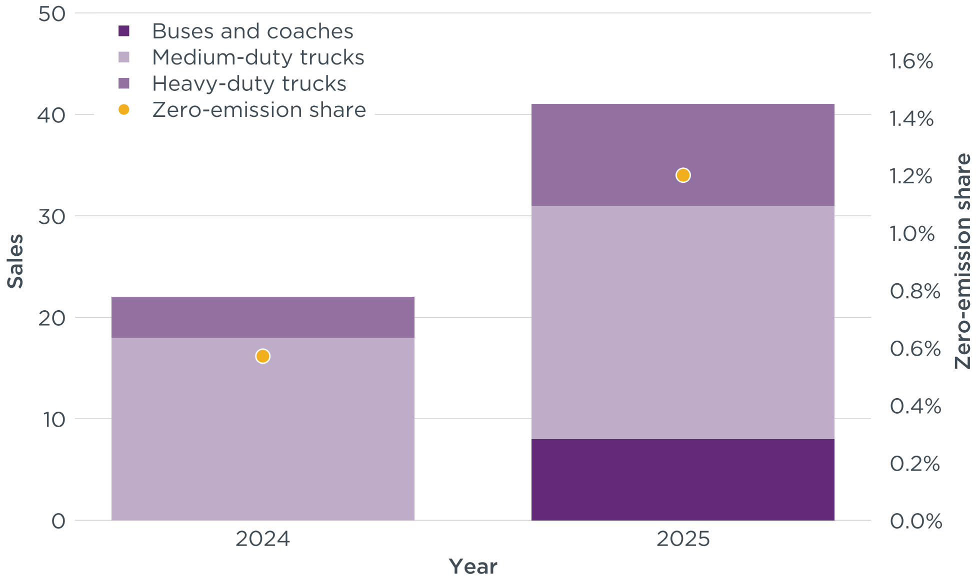
ROMANIA

With 1,480 units sold in 2025, Romania reached a 13.1% ZE-MHDV market share. Buses and coaches accounted for the majority of ZE sales (1,288 units, 53.9% ZE share), with medium-duty trucks (171 units, 21.9% ZE share) and heavy-duty trucks (21 units, 0.3% ZE share) making up the balance. ZE-MHDV sales increased 123% year-over-year in 2025.

EU funds support electric bus procurement and charging infrastructure. Romania's National Recovery and Resilience Plan provides grant funding to cities including Bucharest (€52 million for 100 electric buses and 100 chargers) and Sibiu (36 electric buses), while the EU Modernization Fund approved €1.3 billion in 2025 for transport decarbonization, including €250 million for public charging infrastructure under the e-MOVE RO program and €299 million for highway charging under e-Mobility RO.

#	ZE manufacturers	2025 sales	Share	ICE manufacturers	2025 sales	Share
1	**Ford**	715	48%	**Mercedes**	3,354	34%
2	**Karsan**	122	8%	**Volvo Trucks**	1,504	15%
3	**Iveco**	62	4%	**Iveco**	1,077	11%

SLOVAKIA

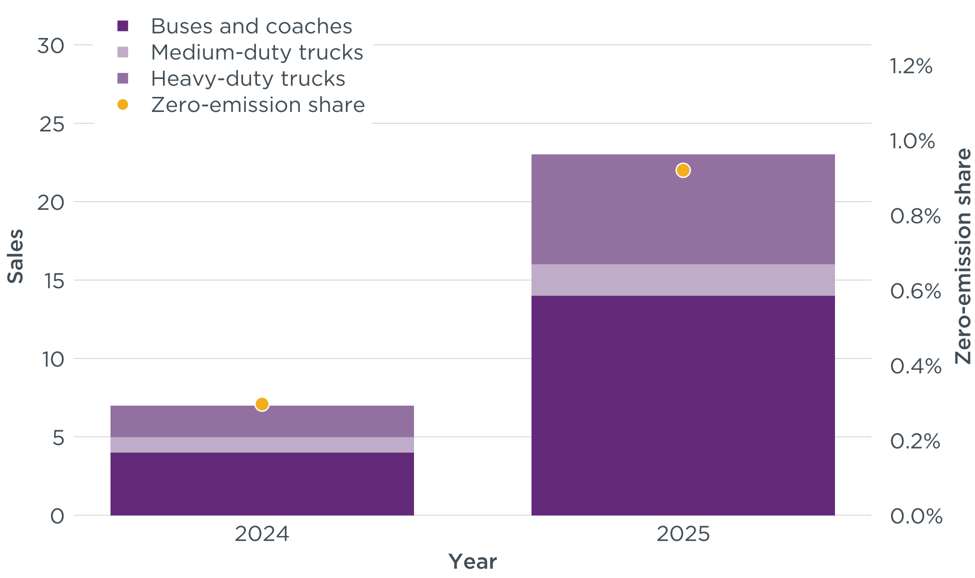


With 41 ZE-MHDV units sold in 2025, Slovakia reached a 1.2% ZE share. By segment, medium-duty trucks led with 23 units (7.3% ZE share), followed by heavy-duty trucks at 10 units (0.3% ZE share) and buses and coaches at 8 units (3.8% ZE share). ZE sales increased by 86% year-over-year from 2024.

Slovakia's National Energy and Climate Plan, updated in 2024 under the EU's Fit for 55 package, supports ZE bus procurement with EU co-financing. Bratislava's SECAP 2030 targets emission-free public transport by 2030.

#	ZE manufacturers	2025 sales	Share	ICE manufacturers	2025 sales	Share
1	Fiat	12	29%	Mercedes	746	22%
2	Iveco	7	17%	Volvo Trucks	592	18%
3	Mercedes	6	15%	Scania	590	17%

SLOVENIA

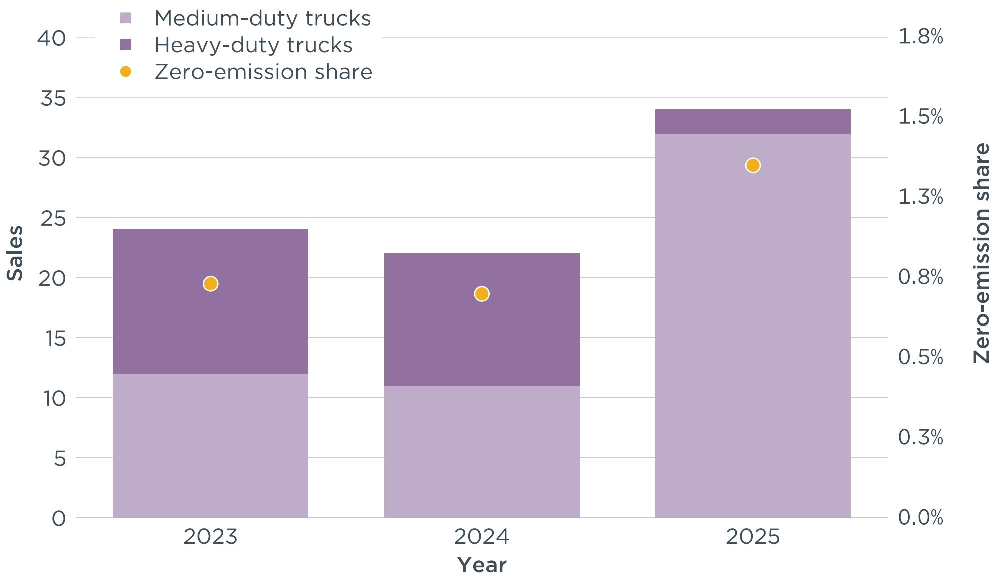


ZE-MHDV sales in Slovenia totaled 23 in 2025, representing 0.9% of all MHDV registrations. By segment, buses and coaches led with 14 units (5.4% ZE share), followed by heavy-duty trucks at 7 units (0.3% ZE share) and medium-duty trucks at 2 units (2.1% ZE share). Sales in 2025 increased 229% year-over-year from 2024.

Slovenia offers few incentives targeting ZE-MHDVs. Municipal ZE bus procurement is advancing through EU Cohesion-funded projects—most notably Ljubljana's €11.6 million project for 16 electric buses.

#	ZE manufacturers	2025 sales	Share	ICE manufacturers	2025 sales	Share
1	Mercedes	11	48%	MAN	623	25%
2	Iveco	7	30%	Volvo Trucks	500	20%
3	Scania	2	9%	Scania	461	19%

SOUTH AFRICA

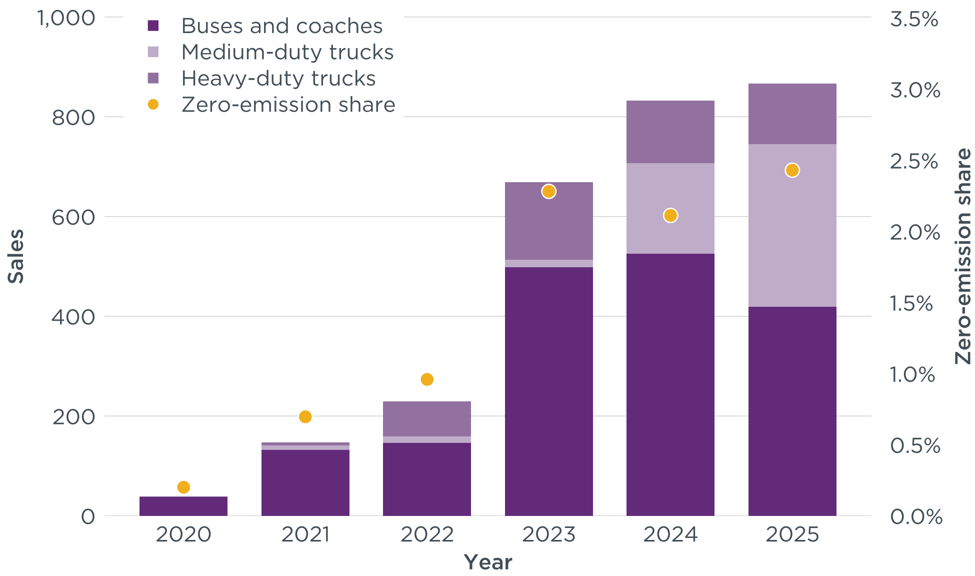


South Africa registered 34 ZE-MHDVs in 2025, representing just 0.13% of the 27,020 units in its MHDV market. The entire volume was concentrated in the medium-duty (32 units) and heavy-duty (2 units) truck segments, with no ZE bus or coach registrations. ZE-MHDV adoption remains nascent, with the first sales in 2023 (24 units) and annual volumes staying below 35 units through 2025.

South Africa's Green Transport Strategy targets 5% of government fleet vehicles to run on cleaner fuels by 2025. Cape Town and Johannesburg are also undertaking electric bus pilot programs.

#	ZE manufacturers	2025 sales	Share	ICE manufacturers	2025 sales	Share
1	JAC	32	94%	FAW	5,374	20%
2	Mercedes	1	3%	Volvo Trucks	4,238	16%
3	Volvo Trucks	1	3%	Volkswagen	3,723	14%

SPAIN

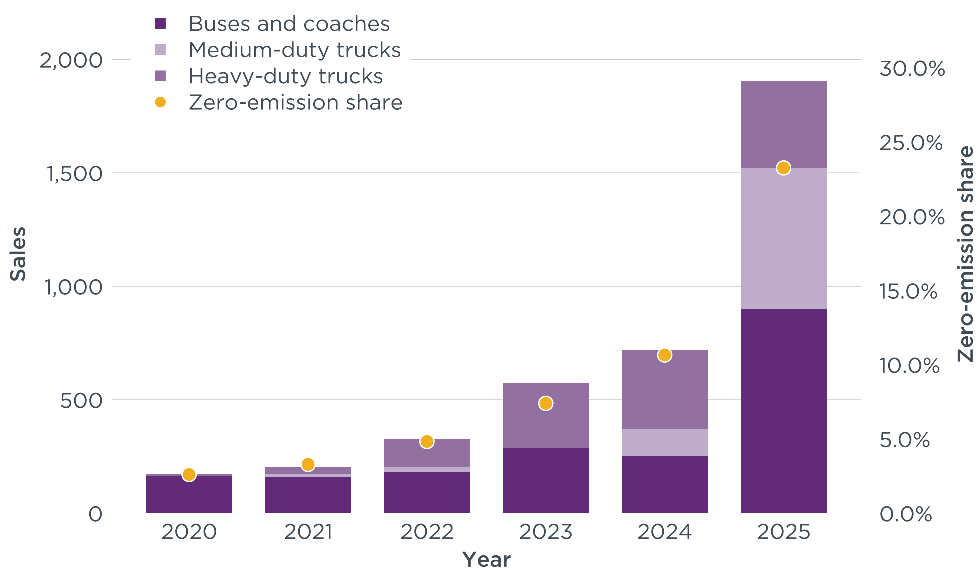


In 2025, Spain's ZE-MHDV market reached 866 units, equivalent to 2.4% of the country's total MHDV sales and an increase from 39 units in 2020. By segment, buses and coaches led with 419 units (9.6% ZE share), followed by medium-duty trucks at 326 units (4.6% ZE share) and heavy-duty trucks at 121 units (0.5% ZE share). ZE-MHDV sales increased 4% year-over-year from 2024, pushing cumulative growth to more than 2,100% since 2020.

Spain has enacted multiple ZE-MHDV incentive programs. MOVES III (€1.735 billion through December 2025) subsidized N2/N3 trucks and M2/M3 buses, and the new centrally managed Plan Auto+ provides point-of-sale rebates. The December 2025 Sustainable Mobility Law mandates transport decarbonization, and the draft Plan Social para el Clima (2026–2032) currently earmarks €846.2 million for micro-enterprises to provide purchase, leasing, scrappage, and depot-charging support to cover much of the price gap between diesel and electric MHDVs.

#	ZE manufacturers	2025 sales	Share	ICE manufacturers	2025 sales	Share
1	Mercedes	126	15%	Iveco	5,647	16%
2	Ford	115	13%	Mercedes	5,062	15%
3	Yutong	67	8%	Renault Trucks	3,844	11%

SWEDEN

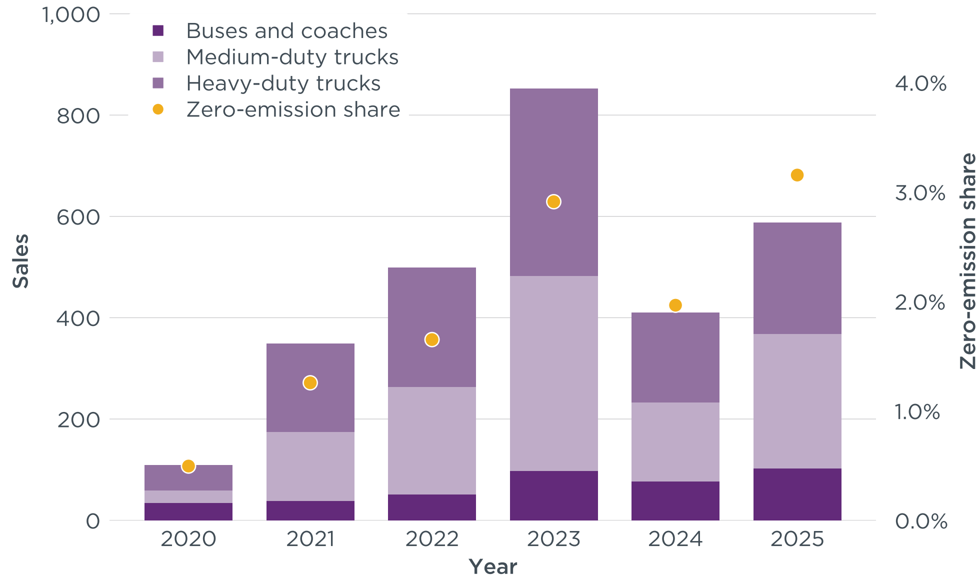


In Sweden, 1,902 ZE-MHDVs were registered in 2025, equivalent to a 23.2% share of the country's MHDV sales and an increase from 174 units in 2020. By segment, buses and coaches led with 901 units (45.7% ZE share), followed by medium-duty trucks at 619 units (64.1% ZE share) and heavy-duty trucks at 382 units (7.3% ZE share). A 165% year-over-year increase in ZE-MHDV sales in 2025 reinforced cumulative growth of about 1,000% since 2020.

Sweden's Klimatpremie covers up to 60% of the price gap between ZE and conventional trucks for companies and is paired with a separate electric bus premium. In addition, a November 2025 amendment exempts ZE trucks from nighttime driving bans. ZE adoption is also backed by Europe's second-largest public HDV charging network (278 stations). Stockholm launched a zero-emission zone in December 2024, covering 20 inner-city blocks, and a zero-emission zone in Gothenburg has been proposed.

#	ZE manufacturers	2025 sales	Share	ICE manufacturers	2025 sales	Share
1	**Mercedes**	667	35%	**Scania**	2,523	40%
2	**MAN**	414	22%	**Volvo Trucks**	1,867	30%
3	**Solaris**	213	11%	**Mercedes**	810	13%

THAILAND

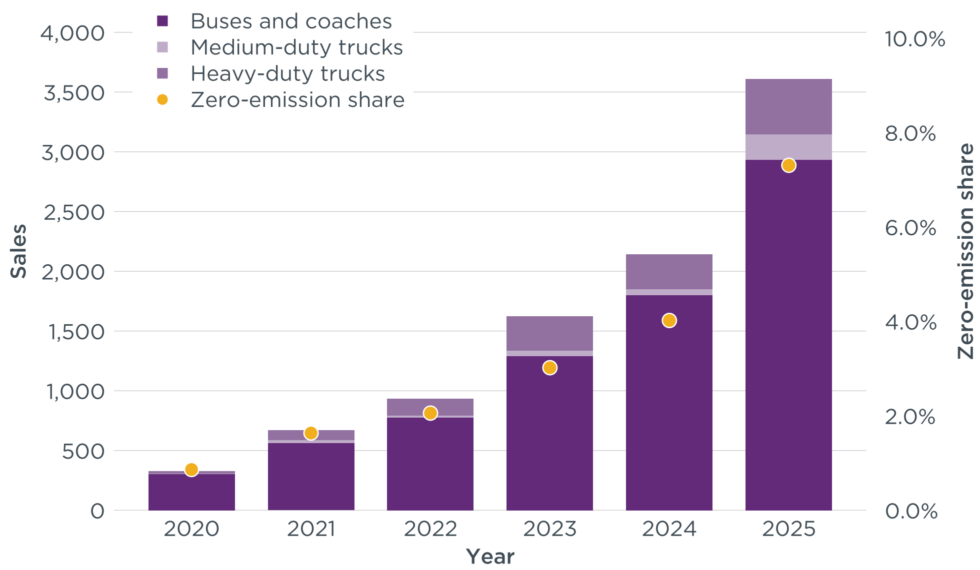


In 2025, 588 ZE-MHDVs were sold in Thailand, accounting for 3.2% of the 18,638 units in its MHDV market. By segment, medium-duty trucks led with 265 units (2.9% ZE share), followed by heavy-duty trucks with 220 units (3.1% ZE share) and buses and coaches with 103 units (4.3% ZE share). Annual ZE registrations previously rose from 109 in 2020 to a peak of 852 in 2023, before falling to 410 in 2024.

The Board of Investment offers tax incentives for electric vehicle and charging infrastructure manufacturing, and Thailand aims to position itself as a regional electric vehicle production hub.

#	ZE manufacturers	2025 sales	Share	ICE manufacturers	2025 sales	Share
1	**BYD**	384	66%	**Isuzu**	9,400	50%
2	**EVT**	189	33%	**Hino**	5,158	28%
3	**ZO Motors**	2	0.3%	**Toyota**	1,758	9%

UNITED KINGDOM

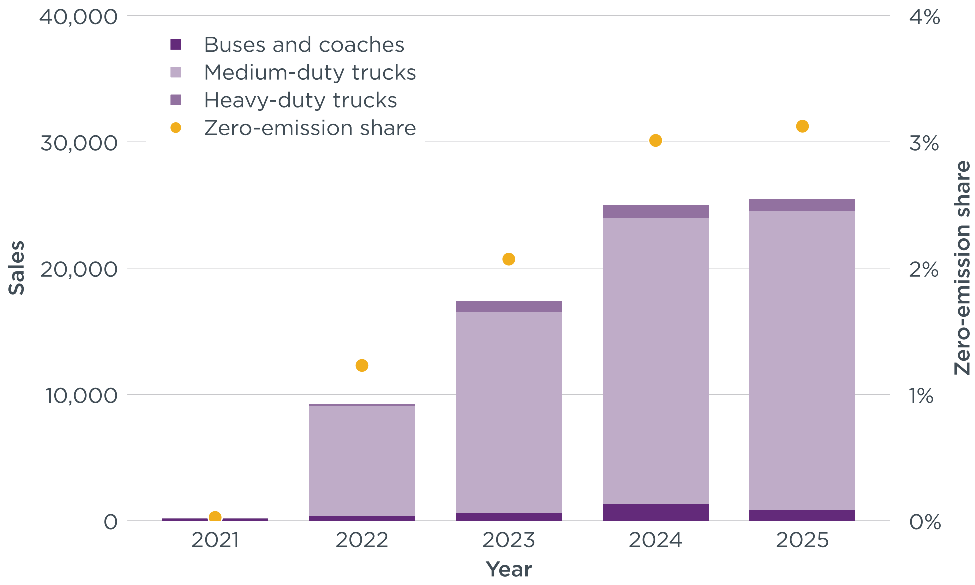


The United Kingdom registered 3,609 ZE-MHDVs in 2025, representing 7.3% of the 49,400 units in its MHDV market and an increase from 328 units in 2020. Buses and coaches dominated with 2,932 units, led by manufacturer Wrightbus (1,007 units), which held a 28% share of the United Kingdom's bus manufacturer market. Heavy-duty trucks followed with 464 units (1.3% ZE share) and medium-duty trucks with 213 units (3.0% ZE share).

The United Kingdom has pledged to end sales of new non-ZE heavy goods vehicles under 26 tonnes by 2035 and all new heavy goods vehicles by 2040, with a formal CO_2 regulatory framework for heavy goods vehicles under consultation.

#	ZE manufacturers	2025 sales	Share	ICE manufacturers	2025 sales	Share
1	**Wrightbus**	1,007	28%	**Paccar**	12,865	28%
2	**Yutong**	743	21%	**Volkswagen**	11,190	24%
3	**Volvo Trucks**	506	14%	**Volvo Trucks**	10,293	22%

UNITED STATES



With 25,427 ZE-MHDV units registered in 2025, the United States reached a 3.1% ZE market share. By segment, medium-duty trucks led with 23,655 units (4.4% ZE share), followed by buses and coaches at 897 units (4.4% ZE share) and heavy-duty trucks at 875 units (0.3% ZE share). ZE-MHDV sales grew by 2% year-over-year from 2024 and reached a cumulative growth of over 12,000% since 2021.

The Phase 3 greenhouse gas standards were recently repealed, and Congress has revoked California and 10 other states' waiver to implement the Advanced Clean Trucks rule. Federal fiscal incentives for ZE-MHDVs were also significantly reduced. As a result, ZE-MHDV deployment is now driven primarily by fleet economics that take advantage of electric HDVs' lower total cost of ownership relative to diesel counterparts, helped by state incentive programs.

#	ZE manufacturers	2025 sales	Share	ICE manufacturers	2025 sales	Share
1	**Rivian Automotive**	11,741	46%	**Ford**	255,735	32%
2	**Ford**	6,375	25%	**Mercedes**	162,672	21%
3	**General Motors**	3,631	14%	**General Motors**	84,854	11%

COUNTRY-LEVEL SUMMARY

Country	Year	ZE sales	Total HDV sales	ZE share (%)	Buses and coaches	Medium-duty trucks	Heavy-duty trucks	Top ZE manufacturer
Austria	2020	14	7,030	0.2	12	2	-	K-Bus (Kutsenits)
	2021	14	7,974	0.2	9	5	-	Hess
	2022	45	7,673	0.6	31	6	8	Mercedes
	2023	86	9,523	0.9	56	4	26	MAN
	2024	272	8,983	3.0	102	45	125	Mercedes
	2025	653	7,950	8.2	248	117	288	Mercedes
Belgium	2020	-	3,329	0.0	-	-	-	-
	2021	8	3,844	0.2	8	-	-	MAN
	2022	46	8,475	0.5	30	4	12	MAN
	2023	127	9,808	1.3	92	-	35	Van Hool
	2024	320	10,276	3.1	194	48	78	Mercedes
	2025	1,040	10,658	9.8	711	138	191	Mercedes
Brazil	2021	313	148,536	0.2	20	291	2	JAC
	2022	753	151,305	0.5	36	709	8	JAC
	2023	478	135,633	0.4	98	350	30	JAC
	2024	853	146,929	0.6	324	476	53	Volkswagen
	2025	1,265	131,922	1.0	846	366	53	Caio/Eletra
Canada	2020	71	42,068	0.2	71	-	-	Lion Electric
	2021	648	46,636	1.4	643	5	-	Volkswagen
	2022	231	44,725	0.5	222	7	2	Lion Electric
	2023	685	51,958	1.3	514	163	8	Lion Electric
	2024	274	52,287	0.5	136	77	61	New Flyer
	2025	471	47,676	1.0	392	44	35	Volvo Trucks
Chile	2020	367	11,778	3.1	367	-	-	BAIC
	2021	37	17,179	0.2	37	-	-	BYD
	2022	344	18,349	1.9	342	-	2	BAIC
	2023	1,387	14,086	9.8	1,376	6	5	BAIC
	2024	498	11,965	4.2	470	15	13	Yutong
	2025	1,917	17,732	10.8	1,873	28	16	Sinotruk
China	2020	72,913	2,991,998	2.4	58,478	11,631	2,804	Yutong
	2021	81,147	2,720,516	3.0	47,027	23,595	10,525	Yutong
	2022	112,657	1,222,291	9.2	47,453	41,416	23,788	Yutong
	2023	110,424	1,411,502	7.8	30,220	45,829	34,375	Geely
	2024	231,092	1,494,211	15.5	48,400	100,425	82,267	Yutong
	2025	457,301	1,773,014	25.8	50,556	174,744	232,001	Foton

Country	Year	ZE sales	Total HDV sales	ZE share (%)	Buses and coaches	Medium-duty trucks	Heavy-duty trucks	Top ZE manufacturer
Colombia	2020	511	11,749	4.3	417	94	-	BYD
	2021	213	14,919	1.4	101	93	19	BYD
	2022	1,154	18,109	6.4	1,003	150	1	BYD
	2023	54	11,571	0.5	10	39	5	Sinotruk
	2024	94	10,062	0.9	-	87	7	BAIC
	2025	33	12,905	0.3	11	20	2	JAC
Croatia	2024	1	2,264	0.0	-	-	1	Volvo Trucks
	2025	11	2,114	0.5	9	2	-	Karsan
Czechia	2024	86	10,502	0.8	59	16	11	Sor
	2025	187	9,983	1.9	52	97	38	Mercedes
Denmark	2020	19	3,682	0.5	4	-	15	Dennis (Eagle)
	2021	242	4,670	5.2	217	7	18	Yutong
	2022	400	5,130	7.8	352	11	37	Yutong
	2023	408	4,975	8.2	195	1	212	Yutong
	2024	802	4,856	16.5	380	212	210	Mercedes
	2025	1,158	5,000	23.2	410	473	275	Mercedes
Finland	2020	13	2,626	0.5	9	2	2	Yutong
	2021	77	2,727	2.8	75	-	2	BYD
	2022	191	2,759	6.9	177	9	5	Volvo Trucks
	2023	80	3,093	2.6	48	4	28	Volvo Trucks
	2024	376	3,450	10.9	315	22	39	Yutong
	2025	234	2,854	8.2	145	36	53	Yutong
France	2020	66	38,977	0.2	61	1	4	Heuliez Bus
	2021	293	40,082	0.7	271	13	9	Heuliez Bus
	2022	445	38,046	1.2	350	81	14	Heuliez Bus
	2023	867	49,091	1.8	316	187	364	Renault Trucks
	2024	2,255	57,538	3.9	659	942	654	Ford
	2025	2,706	52,605	5.1	757	1,083	866	Renault Trucks
Germany	2020	164	65,583	0.3	143	10	11	Mercedes
	2021	366	68,548	0.5	319	14	33	Mercedes
	2022	550	65,964	0.8	385	70	95	Mercedes
	2023	1,077	81,082	1.3	533	28	516	Mercedes
	2024	4,749	93,572	5.1	884	2,689	1,176	Ford
	2025	7,430	84,350	8.8	1,859	3,934	1,637	Mercedes

Country	Year	ZE sales	Total HDV sales	ZE share (%)	Buses and coaches	Medium-duty trucks	Heavy-duty trucks	Top ZE manufacturer
Greece	2020	2	550	0.4	2	-	-	Tecnobus
	2021	-	724	0.0	-	-	-	-
	2022	1	686	0.1	1	-	-	Karsan
	2023	9	642	1.4	7	-	2	Rampini
	2024	279	1,493	18.7	272	3	4	Yutong
	2025	192	1,513	12.7	118	12	62	Yutong
Hungary	2024	28	5,694	0.5	2	22	4	Ford
	2025	119	6,324	1.9	65	25	29	BYD
India	2021	1,254	288,570	0.4	1,254	-	-	Tata
	2022	2,117	419,774	0.5	2,117	-	-	PMI
	2023	3,616	490,147	0.7	3,307	9	300	Tata
	2024	4,770	488,415	1.0	4,457	119	194	Tata
	2025	5,788	546,464	1.1	5,021	528	239	Switch Mobility
Ireland	2020	3	1,940	0.2	3	-	-	Higer
	2021	3	2,523	0.1	1	2	-	Mitsubishi Fuso
	2022	8	2,261	0.4	7	1	-	Higer
	2023	65	2,780	2.3	49	-	16	Wrightbus
	2024	284	4,060	7.0	238	29	17	Maxus
	2025	131	4,010	3.3	24	98	9	Ford
Italy	2020	12	19,913	0.1	12	-	-	Solaris
	2021	189	28,851	0.7	178	5	6	Solaris
	2022	85	26,946	0.3	71	10	4	Solaris
	2023	301	29,590	1.0	271	1	29	Solaris
	2024	1,307	34,624	3.8	1,089	190	28	Iveco
	2025	1,822	32,478	5.6	1,217	525	80	Iveco
Latvia	2024	36	1,583	2.3	29	5	2	Iveco
	2025	58	1,275	4.5	54	4	-	Solaris
Lithuania	2024	68	8,830	0.8	65	1	2	Skoda
	2025	241	12,326	2.0	235	3	3	King Long
Luxembourg	2020	30	1,190	2.5	29	-	1	Mercedes
	2021	27	1,221	2.2	27	-	-	Volvo Trucks
	2022	138	1,403	9.8	138	-	-	Karsan
	2023	80	1,719	4.7	76	2	2	Karsan
	2024	242	1,224	19.8	238	2	2	Mercedes
	2025	107	1,240	8.6	92	11	4	Mercedes

Country	Year	ZE sales	Total HDV sales	ZE share (%)	Buses and coaches	Medium-duty trucks	Heavy-duty trucks	Top ZE manufacturer
Mexico	2020	130	27,718	0.5	130	-	-	Yutong
	2021	13	32,067	0.0	8	-	5	Yutong
	2022	302	40,309	0.7	285	-	17	Yutong
	2023	242	53,250	0.5	126	-	116	Yutong
	2024	288	59,531	0.5	147	-	141	Yutong
	2025	271	41,225	0.7	11	-	260	JAC
Netherlands	2020	130	10,238	1.3	109	16	5	VDL
	2021	183	11,361	1.6	140	30	13	Ebusco
	2022	193	12,976	1.5	103	51	39	VDL
	2023	558	15,077	3.7	175	61	322	Volvo Trucks
	2024	1,073	19,560	5.5	409	185	479	Volvo Trucks
	2025	2,808	12,220	23.0	784	1,137	887	Mercedes
Poland	2024	211	27,478	0.8	159	29	23	Solaris
	2025	376	29,153	1.3	270	71	35	Solaris
Portugal	2020	-	3,623	0.0	-	-	-	-
	2021	3	4,462	0.1	3	-	-	Caetano Bus
	2022	4	4,964	0.1	2	1	1	Mercedes
	2023	357	7,199	5.0	356	-	1	Zhong Tong
	2024	179	6,782	2.6	114	51	14	Caetano Bus
	2025	189	6,970	2.7	113	53	23	Yutong
Romania	2024	665	10,145	6.6	627	34	4	Ford
	2025	1,480	11,332	13.1	1,288	171	21	Ford
Slovakia	2024	22	3,857	0.6	-	18	4	Mitsubishi Fuso
	2025	41	3,418	1.2	8	23	10	Fiat
Slovenia	2024	7	2,363	0.3	4	1	2	Iveco Bus
	2025	23	2,501	0.9	14	2	7	Mercedes
South Africa	2020	-	19,285	0.0	-	-	-	-
	2021	-	23,436	0.0	-	-	-	-
	2022	-	26,284	0.0	-	-	-	-
	2023	24	28,728	0.1	-	12	12	JAC
	2024	22	27,523	0.1	-	11	11	Volvo Trucks
	2025	34	27,020	0.1	-	32	2	JAC

Country	Year	ZE sales	Total HDV sales	ZE share (%)	Buses and coaches	Medium-duty trucks	Heavy-duty trucks	Top ZE manufacturer
Spain	2020	39	19,450	0.2	38	-	1	Solaris
	2021	147	21,122	0.7	132	9	6	Irizar
	2022	229	23,886	1.0	146	13	70	Irizar
	2023	669	29,329	2.3	498	16	155	Irizar
	2024	832	39,393	2.1	526	181	125	Irizar
	2025	866	35,639	2.4	419	326	121	Mercedes
Sweden	2020	174	6,683	2.6	164	3	7	Volvo Trucks
	2021	203	6,179	3.3	160	12	31	Volvo Trucks
	2022	325	6,733	4.8	181	24	120	Volvo Trucks
	2023	573	7,749	7.4	288	-	285	Volvo Trucks
	2024	718	6,743	10.6	251	122	345	Volvo Trucks
	2025	1,902	8,183	23.2	901	619	382	Mercedes
Thailand	2020	109	21,977	0.5	35	24	50	EVT
	2021	349	27,772	1.3	38	137	174	EVT
	2022	499	30,215	1.7	51	213	235	EVT
	2023	852	29,265	2.9	98	384	370	EVT
	2024	410	20,859	2.0	77	156	177	EVT
	2025	588	18,638	3.2	103	265	220	BYD
United Kingdom	2020	328	38,008	0.9	303	5	20	New Flyer
	2021	669	40,925	1.6	564	25	80	New Flyer
	2022	931	45,262	2.1	775	18	138	New Flyer
	2023	1,622	53,732	3	1,292	42	288	New Flyer
	2024	2,144	53,346	4.0	1,799	53	292	Wrightbus
	2025	3,609	49,400	7.3	2,932	213	464	Wrightbus
United States	2021	203	796,459	0.0	137	29	37	Mercedes
	2022	9,243	751,916	1.2	358	8,693	192	Ford
	2023	17,362	838,254	2.1	586	15,976	800	Rivian Automotive
	2024	25,018	830,854	3.0	1,334	22,633	1,051	Ford
	2025	25,427	813,980	3.1	897	23,655	875	Rivian Automotive

TERMINOLOGY AND DATA SOURCES

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 **battery electric truck or bus** uses a powertrain that stores electricity in an onboard battery pack, charged from the grid, and delivers it directly to an electric motor to power the vehicle. There is no onboard fuel conversion — the battery is the sole energy source.

A **fuel-cell electric truck or bus** uses a powertrain that generates electricity onboard through a fuel cell stack, which converts hydrogen (stored in onboard tanks) into electricity via an electrochemical reaction, powering an electric motor. Fuel cell electric vehicles typically also include a smaller battery to support power delivery, but hydrogen — not grid charging — is the primary energy source.

Both battery electric and fuel-cell electric are zero-tailpipe-emission powertrains, differing mainly in how they store and convert energy onboard: batteries store energy directly, while fuel cells convert hydrogen into electricity on demand.

Region	Medium-duty truck	Heavy-duty truck	Bus and coach	Data source
European Union[a]	A truck or van with a gross vehicle weight (GVW) between 3,500 kg and 12,000 kg	A truck or tractor-trailer with a GVW above 12,000 kg	A bus-type passenger vehicle with a GVW above 3,500 kg	Dataforce
China	A truck or van with a gross vehicle weight (GVW) between 3,500 kg and 12,000 kg	A truck or tractor-trailer with a GVW above 12,000 kg	A bus-type passenger vehicle with a GVW above 3,500 kg	Gasgoo Auto
India	A truck or van with a gross vehicle weight (GVW) between 3,500 kg and 12,000 kg	A truck or tractor-trailer with a GVW above 12,000 kg	A bus-type passenger vehicle with a GVW above 3,500 kg	Segment Y Automotive Intelligence (www.Segmenty.com)
United States	A Class 2b–6 truck or van with a GVW between 8,501 lb and 26,000 lb	Class 7-8 vehicles, with a GVW above 26,000 lb	All Class 4–8 buses and coaches	Mobility Global
Chile	A truck or van with GVW between 6,001 kg and 15,000 kg	A truck or tractor-trailer with a GVW above 15,000 kg	All bus-type passenger vehicles	Mobility Global
United Kingdom	A truck or van with GVW between 6,001 kg and 15,000 kg	A truck or tractor-trailer with a GVW above 15,000 kg	All bus-type passenger vehicles	Mobility Global
South Africa	A truck or van with GVW between 6,001 kg and 15,000 kg	A truck or tractor-trailer with a GVW above 15,000 kg	All bus-type passenger vehicles	Mobility Global
Colombia	A truck or van with GVW between 6,001 kg and 15,000 kg	A truck or tractor-trailer with a GVW above 15,000 kg	All bus-type passenger vehicles	Mobility Global
Canada	A truck or van with GVW between 6,001 kg and 15,000 kg	A truck or tractor-trailer with a GVW above 15,000 kg	All bus-type passenger vehicles	Mobility Global
Thailand	A truck or van with GVW between 6,001 kg and 15,000 kg	A truck or tractor-trailer with a GVW above 15,000 kg	All bus-type passenger vehicles	EV Volumes, Mobility Global
Brazil	A truck or van with a GVW between 3,500 kg and 15,000 kg	A truck or tractor-trailer with a GVW above 15,000 kg	All bus-type passenger vehicles	JATO Dynamics
Mexico	Trucks are not specified due to data limitation		All bus-type passenger vehicles	Public data

[a] Excludes Bulgaria, Cyprus, Estonia, and Malta.

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