



12 MARCH 2025

## AUTOMOBILE MARKET OF RUSSIA IN FEBRUARY AND JANUARY-FEBRUARY 2025 NEW TRUCKS AND BUSES

In February and in January-February 2025, sales of new trucks and buses in Russia showed the following results\*:

- Trucks (except light trucks, N1 category) including special-purpose vehicles – 5 684 units in February 2025, down 45.5% YOY; 11 445 units in January-February 2025, down 36.9% YOY.
  - Buses and coaches (except minibuses, M2 category) – 612 units in February 2025, down 69.2% YOY; 1 246 units in January-February 2025, down 60.7% YOY.
- Among them – electric buses: 52 units in February 2025, down 54.4% YOY; 99 units in January-February 2025, down 51.9% YOY.

\* without sales to military, law enforcement and diplomatic agencies in RF

### COMMENT:

Vasily Sein, Head of the Market Research Centre at ASM Holding, commented:

According to ASM Holding analytic company, monthly sales of trucks including special-purpose vehicles in February 2025 continued the downturn commenced in November 2024 and declined by 46% year-over-year, from 10 430 to 5 684 units. The fall of sales is slowing down, and the sales volume may get stabilized on the current level. The total truck sales in January-February 2025 decreased by 37% - from 18 135 to 11 445 units – in comparison with the same period of the last year. Sales of foreign-branded trucks in the first two months of 2025 showed a decline by 48% as compared to January-February 2024, while sales of domestically branded new trucks lost only 5 percent. KAMAZ was the best-selling brand in February 2025 (1501 sales), gaining 26% of the new truck market. Development of the new truck market in the first half of 2025 will depend on pricing policies of OEMs and distributors, growth of commercial activities and efficiency of the leasing programs.

In February 2025, a decline of bus sales slowed down, 612 units being sold vs. 634 units sold in January 2025. The share of domestic brands in February 2025 was 75% of the new bus market. The total sales result of January-February 2025 was 1 246 new buses, down 61% year-over-year. Sales of electric buses in the first two months of this year fell by 52% to 99 units.

The best-selling bus brand in January-February 2025 is PAZ with 615 vehicles sold and a 49% market share.

Any further development of the bus market will depend on allocation of budgetary financing for renovation of the public transport and on efficiency of leasing programs.

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# TRUCKS

## Sales of new trucks in Russia in February and 2 months 2025 by brand, inclusive of special-purpose vehicles

Brand	February 2025	February 2024	2 months 2025	2 months 2024	Change February 2025 vs 2024, %	Change 2 months 2025 vs 2024, %
KAMAZ	1 501	1 661	2 939	3 089	-9,6	-4,9
SITRAK	1 038	2 294	2 127	3 798	-54,8	-44,0
GAZ	518	592	915	1 039	-12,5	-11,9
SHAANXI	398	1 255	899	2 173	-68,3	-58,6
FAW	385	882	810	1 561	-56,3	-48,1
MAZ	290	445	564	850	-34,8	-33,6
URAL	281	318	500	581	-11,6	-13,9
DONGFENG	228	696	434	1 123	-67,2	-61,4
JAC	172	333	416	569	-48,3	-26,9
FOTON	158	310	312	545	-49,0	-42,8
ISUZU	151	86	288	147	75,6	95,9
HOWO	118	443	263	745	-73,4	-64,7
VALDAI	57	12	137	19	375,0	621,1
SANY	52	180	118	322	-71,1	-63,4
VOLVO	51	62	110	93	-17,7	18,3
MERCEDES	43	379	90	584	-88,7	-84,6
AMT	23	44	72	87	-47,7	-17,2
ZOOMLION	24	56	53	116	-57,1	-54,3
HONGYAN	34	66	46	100	-48,5	-54,0
SCANIA	33	19	46	60	73,7	-23,3
XU GONG	17	61	42	125	-72,1	-66,4
MAZ MAN	26	0	38	1		3 700,0
MAN	6	64	29	100	-90,6	-71,0
HYUNDAI	12	13	28	27	-7,7	3,7
JMC	13	0	27	0		
SHANQI	6	0	27	0		
DAEWOO	12	20	21	47	-40,0	-55,3
LIUGONG	8	1	15	2	700,0	650,0
CHENGLONG	7	0	14	0		
DAYUN	8	26	13	47	-69,2	-72,3
FORD	0	0	9	2		350,0
BEIBEN	1	17	8	33	-94,1	-75,8
DAF	4	35	7	55	-88,6	-87,3
FUSO	4	2	7	5	100,0	40,0
HINO	0	27	6	32	-100,0	-81,2
CAMC	0	0	4	0		
IVECO	1	3	4	5	-66,7	-20,0
LIEBHERR	0	0	2	0		
MZKT	2	2	2	5	0,0	-60,0
AMUR	0	0	1	0		
BEIFANG BENCHI	1	10	1	17	-90,0	-94,1
SDAC	1	1	1	6	0,0	-83,3



# TRUCKS

Brand	February 2025	February 2024	2 months 2025	2 months 2024	Change February 2025 vs 2024, %	Change 2 months 2025 vs 2024, %
AVIA	0	0	0	1		-100,0
BAW	0	3	0	3	-100,0	-100,0
LANDWIND JIANGLING - JMC	0	1	0	1	-100,0	-100,0
NEFAZ	0	3	0	3	-100,0	-100,0
RENAULT	0	8	0	13	-100,0	-100,0
TATRA	0	0	0	2		-100,0
ZIL	0	0	0	2		-100,0
<b>TOTAL</b>	<b>5 684</b>	<b>10 430</b>	<b>11 445</b>	<b>18 135</b>	<b>-45,5</b>	<b>-36,9</b>
<b>TOTAL Russian brands</b>	<b>2 380</b>	<b>2 630</b>	<b>4 564</b>	<b>4 820</b>	<b>-9,5</b>	<b>-5,3</b>
<b>TOTAL foreign brands</b>	<b>3 304</b>	<b>7 800</b>	<b>6 881</b>	<b>13 315</b>	<b>-57,6</b>	<b>-48,3</b>

## Sales of new trucks in Russia in February and 2 months 2025 by type

Type	February 2025	February 2024	2 months 2025	2 months 2024	Market share February 2025, %	Market share February 2024, %	Market share 2 months 2025, %	Market share 2 months 2024, %
Other special equipment	2 891	3 448	5 594	6 043	50,9	33,1	48,9	33,3
Truck-tractor	1 099	3 197	2 263	5 477	19,3	30,7	19,8	30,2
Other truck types	539	1 321	1 262	2 261	9,5	12,7	11,0	12,5
Dump truck	230	933	556	1 627	4,05	8,95	4,86	8,97
Drop-side flat bed	370	726	734	1 269	6,5	7,0	6,4	7,0
Refrigerator	156	242	313	457	2,7	2,3	2,7	2,5
Van	217	272	396	484	3,8	2,6	3,5	2,7
Autocrane	62	148	125	293	1,1	1,4	1,1	1,6
Tanker	75	101	131	169	1,3	1,0	1,1	0,9
Mobile repair shop	35	18	58	26	0,6	0,2	0,5	0,1
Refueler	10	22	13	27	0,2	0,2	0,1	0,2
Other	0	2	0	2	0,0	0,0	0,0	0,0
<b>TOTAL</b>	<b>5 684</b>	<b>10 430</b>	<b>11 445</b>	<b>18 135</b>	<b>100,0</b>	<b>100,0</b>	<b>100,0</b>	<b>100,0</b>



# TRUCKS

## Top 25 model ranking of new truck sales in Russia in February and 2 months 2025

Rank	Model	Brand	February 2025	February 2024	2 months 2025	2 months 2024	Change February 2025 vs 2024, %	Change 2 months 2025 vs 2024, %
1	C7H 6X4	SITRAK	558	482	1 076	794	15,8	35,5
2	C7H 4X2	SITRAK	373	1 650	881	2 731	-77,4	-67,7
3	GAZON NEXT	GAZ	434	475	748	831	-8,6	-10,0
4	43118 6X6	KAMAZ	414	491	695	798	-15,7	-12,9
5	5490 4X2	KAMAZ	246	198	525	466	24,2	12,7
6	J6 6X4	FAW	260	405	499	744	-35,8	-32,9
7	65115 6X4	KAMAZ	242	287	462	481	-15,7	-4,0
8	4320 6X6	URAL	213	218	368	376	-2,3	-2,1
9	SX 331 8X4	SHAANXI	146	415	347	692	-64,8	-49,9
10	ELF	ISUZU	123	65	224	111	89,2	101,8
11	6520 6X4	KAMAZ	74	98	213	189	-24,5	12,7
12	GX	DONGFENG	176	0	188	0		
13	SX 325 6X4	SHAANXI	57	281	188	509	-79,7	-63,1
14	J7 4X2	FAW	67	297	184	495	-77,4	-62,8
15	SX 425 6X4	SHAANXI	97	358	181	587	-72,9	-69,2
16	C7H 8X4	SITRAK	107	151	170	259	-29,1	-34,4
17	N120	JAC	70	12	166	24	483,3	591,7
18	6312 6X4	MAZ	101	113	159	233	-10,6	-31,8
19	5340 4X2	MAZ	68	107	152	193	-36,4	-21,2
20	KOMPAS 9 4X2	KAMAZ	106	95	129	192	11,6	-32,8
21	T5G 6X4	HOWO	59	92	123	188	-35,9	-34,6
22	N90	JAC	54	17	123	35	217,6	251,4
23	4308 4X2	KAMAZ	34	42	119	76	-19,0	56,6
24	SX 418 4X2	SHAANXI	64	161	116	306	-60,2	-62,1
25	DFH-SERIES	DONGFENG	3	432	111	694	-99,3	-84,0

### 2 months 2025

SITRAK C7H 6X2

1 076 units **35,5%**

SITRAK C7H 4X2

881 units **-67,7%**

GAZ GAZON NEXT

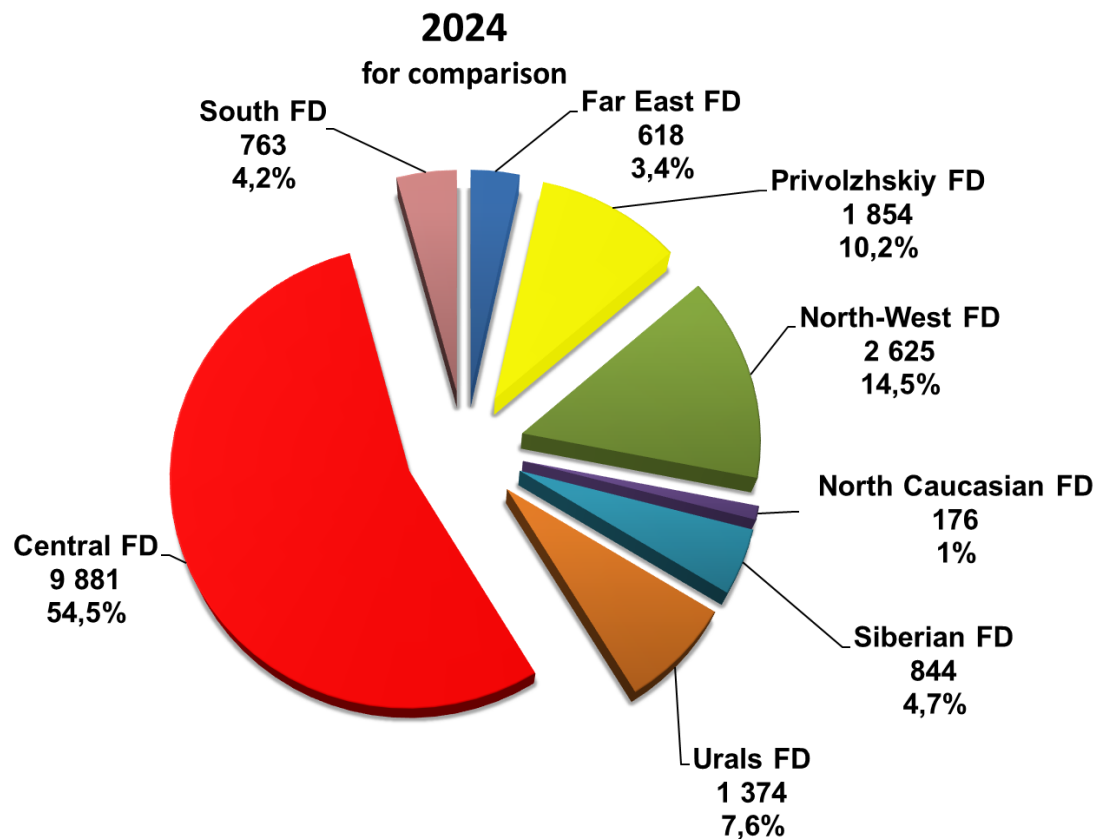
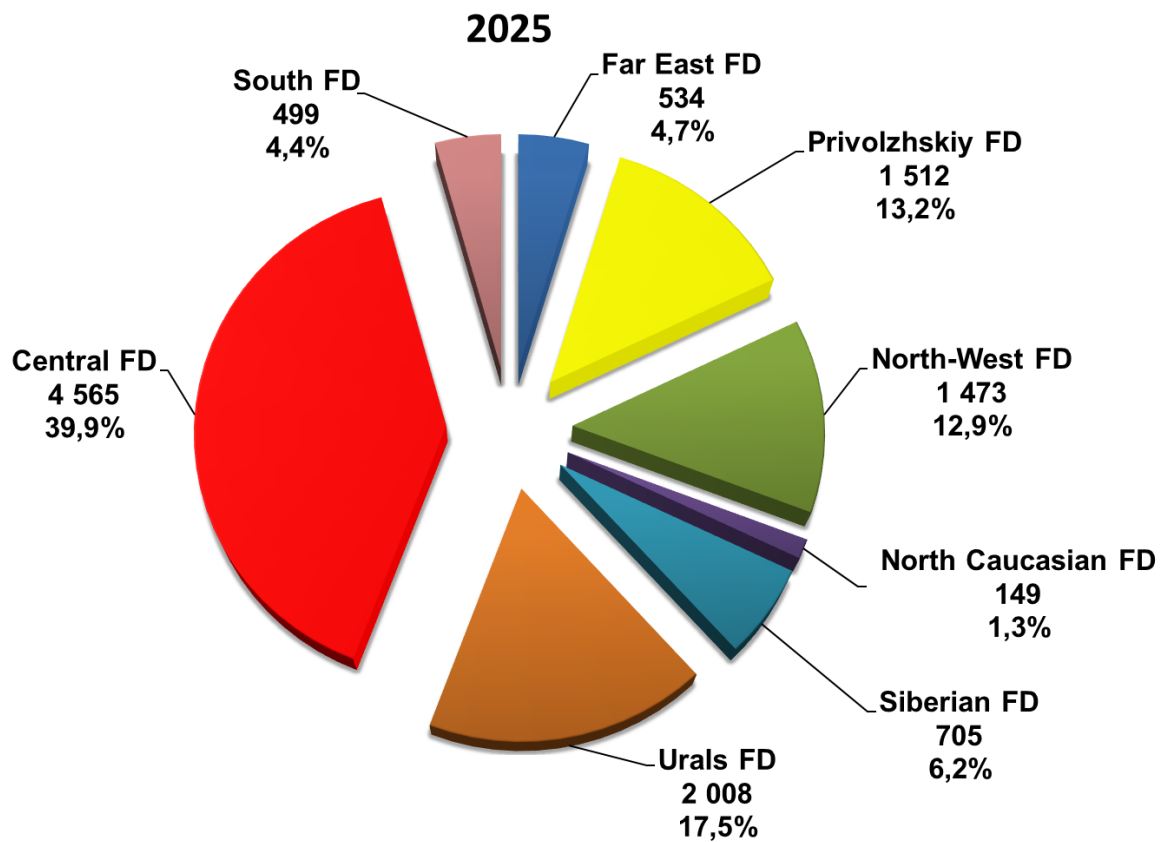
748 units **-10%**





# TRUCKS

## Structure of sales of new truck in Russia in 2 months 2025 by Federal District





# BUSES

## Sales of new buses in Russia in February and 2 months 2025 by brand

Brand	February 2025	February 2024	2 months 2025	2 months 2024	Change February 2025 vs 2024, %	Change 2 months 2025 vs 2024, %
PAZ	290	884	615	1 305	-67,2	-52,9
YUTONG	98	138	176	230	-29,0	-23,5
KAMAZ	60	65	92	100	-7,7	-8,0
KAVZ	33	105	84	141	-68,6	-40,4
NEFAZ	48	228	80	320	-78,9	-75,0
HIGER	29	52	58	107	-44,2	-45,8
LIAZ	4	155	58	377	-97,4	-84,6
GOLDEN DRAGON	7	10	17	12	-30,0	41,7
MAZ	11	63	15	147	-82,5	-89,8
VOLZHANIN	15	128	15	205	-88,3	-92,7
ZHONGTONG	8	20	15	24	-60,0	-37,5
URAL	1	24	7	37	-95,8	-81,1
BMZ	5	0	5	0		
KING LONG (KLM)	2	8	4	18	-75,0	-77,8
ASIA	0	0	3	0		
NEMAN	1	0	2	5		-60,0
ASIASTAR	0	1	0	1	-100,0	-100,0
BKM	0	0	0	11		-100,0
JAC	0	6	0	18	-100,0	-100,0
LOTOS	0	65	0	65	-100,0	-100,0
SAZ	0	1	0	5	-100,0	-100,0
SIMAZ	0	34	0	46	-100,0	-100,0
<b>TOTAL</b>	<b>612</b>	<b>1 987</b>	<b>1 246</b>	<b>3 174</b>	<b>-69,2</b>	<b>-60,7</b>
<b>TOTAL Russian brands</b>	<b>456</b>	<b>1 688</b>	<b>956</b>	<b>2 596</b>	<b>-73,0</b>	<b>-63,2</b>
<b>TOTAL foreign brands</b>	<b>156</b>	<b>299</b>	<b>290</b>	<b>578</b>	<b>-47,8</b>	<b>-49,8</b>



# BUSES

## Sales of new electric buses in Russia in February and 2 months 2025 by brand

Brand / electric buses	February 2025	February 2024	2 months 2025	2 months 2024	Change February 2025 vs 2024, %	Change 2 months 2025 vs 2024, %
KAMAZ	47	65	79	100	-27,7	-21,0
LIAZ	0	37	15	60	-100,0	-75,0
BMZ	5	0	5	0		
NEFAZ	0	0	0	19		-100,0
VOLZHANIN	0	12	0	16	-100,0	-100,0
BKM	0	0	0	11		-100,0
<b>TOTAL</b>	<b>52</b>	<b>114</b>	<b>99</b>	<b>206</b>	<b>-54,4</b>	<b>-51,9</b>
<b>TOTAL Russian brands</b>	<b>52</b>	<b>114</b>	<b>99</b>	<b>195</b>	<b>-54,4</b>	<b>-49,2</b>
<b>TOTAL foreign brands</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>11</b>		<b>-100,0</b>



# BUSES

## Top 25 model ranking of new bus sales in February and 2 months 2025

Rank	Model	Brand	February 2025	February 2024	2 months 2025	2 months 2024	Change February 2025 vs 2024, %	Change 2 months 2025 vs 2024, %
1	3205	PAZ	118	371	216	585	-68,2	-63,1
2	4234	PAZ	102	200	214	313	-49,0	-31,6
3	VECTOR NEXT	PAZ	65	273	169	364	-76,2	-53,6
4	6127	YUTONG	63	69	101	95	-8,7	6,3
5	5299, 5297 4X2	NEFAZ, KAMAZ	48	206	80	283	-76,7	-71,7
6	6282	KAMAZ	47	65	79	100	-27,7	-21,0
7	4238	KAVZ	25	22	70	49	13,6	42,9
8	CITYMAX 12	LIAZ	4	0	43	0		
9	6122	YUTONG	22	37	35	75	-40,5	-53,3
10	KLQ 6129	HIGER	8	26	25	44	-69,2	-43,2
11	6899	YUTONG	12	2	24	3	500,0	700,0
12	KLQ 6128	HIGER	14	9	19	13	55,6	46,2
13	XML	GOLDEN DRAGON	6	4	15	5	50,0	200,0
14	MININ 625600	LIAZ	0	13	15	15	-100,0	0,0
15	LCK-SERIES	ZHONGTONG	8	20	15	24	-60,0	-37,5
16	VEGA	KAMAZ	13	0	13	0		
17	203	MAZ	10	32	13	63	-68,8	-79,4
18	KLQ-SERIES	HIGER	5	6	11	16	-16,7	-31,2
19	4235	KAVZ	6	41	11	46	-85,4	-76,1
20	3204	PAZ	3	2	11	2	50,0	450,0
21	6116	YUTONG	0	0	10	0		
22	3255 4320 6X6	URAL	1	24	7	37	-95,8	-81,1
23	VOLGABUS	VOLZHANIN	6	0	6	0		
24	5298 SIRIUS	BMZ	5	0	5	0		
25	3206	PAZ	2	4	4	7	-50,0	-42,9

### 2 months 2025

PAZ 3205

216 units **-63,1%**

PAZ 4234

214 units **-31,6%**



PAZ VECTOR NEXT

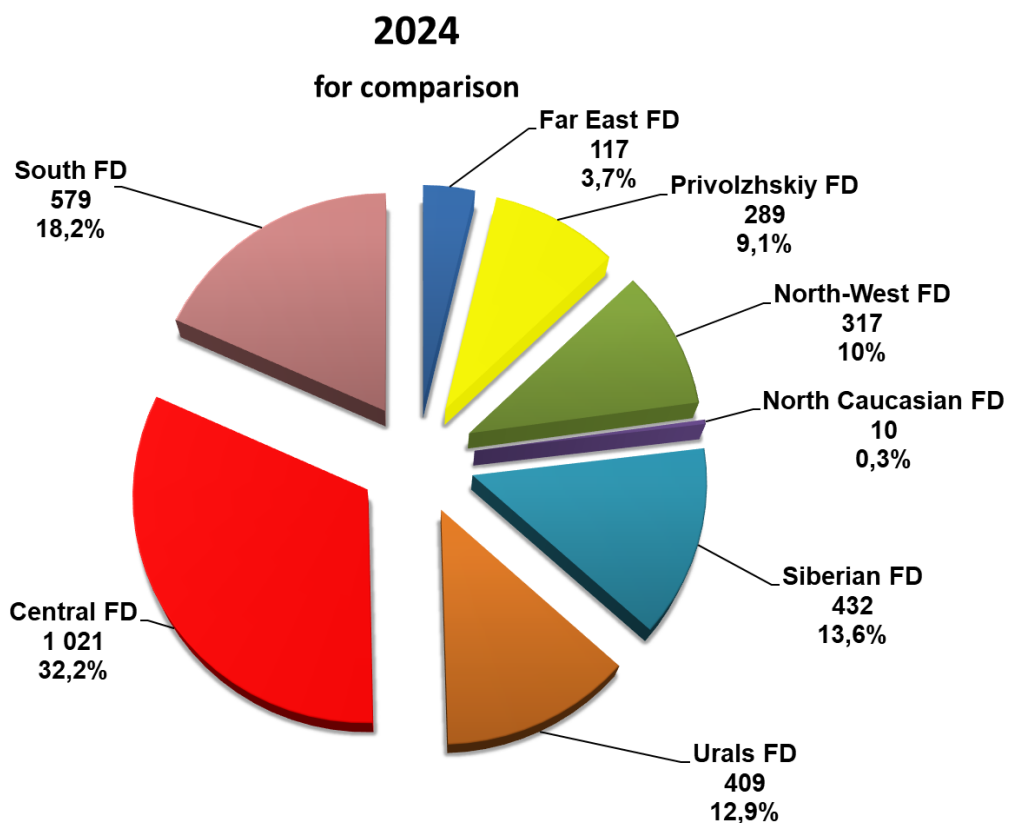
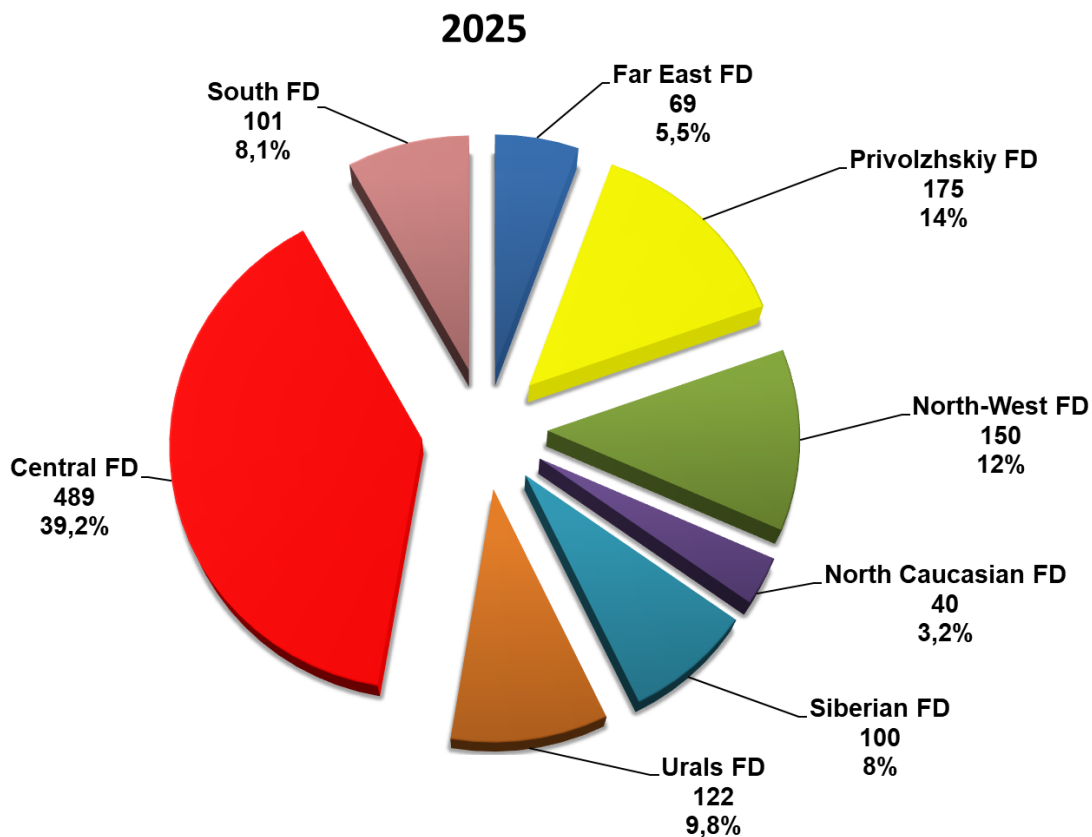
169 units **-53,6%**





# BUSES

## Structure of new bus sales in Russia in 2 months 2025 by Federal District



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