



11 APRIL 2025

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

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

- Trucks (except light trucks, N1 category) including special-purpose vehicles – 5 158 units in March 2025, down 55.7% YOY; 16 603 units in January-March 2025, down 44.2% YOY.
- Buses and coaches (except minibuses, M2 category) – 745 units in March 2025, down 65.3% YOY; 1 991 units in January-March 2025, down 62.6% YOY.
Among them – electric buses: 14 units in March 2025, down 84.9% YOY; 113 units in January-March 2025, down 62.2% 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 March 2025 continued the downturn commenced in late 2024 and declined by 56% year-over-year, from 11 641 to 5 684 units. In comparison with February 2025, the sales in March 2025 fell by 9%. The fall of sales is slowing down, and the sales volume in the coming months may get stabilized on the current level.

The total truck sales in the first quarter of 2025 decreased by 44% in comparison with the same period of the last year – from 29 776 to 16 603 units. Sales of foreign-branded trucks in the first three months of 2025 showed a decline by 56% (to 9707 units) as compared with January-March 2024, while sales of domestically branded new trucks lost only 13 percent (to 6896 units). The share of foreign brands on the market decreased from 73% in 2024 to 58% in January-March 2025.

KAMAZ was the best-selling brand in March 2025 (1583 sales), gaining 31% of the new truck market. The best-selling truck model in March 2025 was KAMAZ 43118 (6x6), with 420 trucks sold.

In March 2025, bus sales declined by 65% year-on-year, and in Q1 2025 the decline was by 63% YOY. The share of domestic brands in March 2025 was 77% of the new bus market. Sales of electric buses in the first three months of this year fell by 62% to 113 units.

The best-selling bus brand in January-March 2025 is PAZ with 1016 vehicles being sold (down 59%), gaining a 51% market share.

At a later date, the bus market could recover depending on allocation of budgetary financing for renovation of the public transport.

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TRUCKS

Sales of new trucks in Russia in March and 3 months 2025 by brand, inclusive of special-purpose vehicles

Brand	March 2025	March 2024	3 months 2025	3 months 2024	Change March 2025 vs 2024, %	Change 3 months 2025 vs 2024, %
KAMAZ	1 583	1 949	4 522	5 038	-18,8	-10,2
SITRAK	515	2 193	2 642	5 991	-76,5	-55,9
GAZ	400	702	1 315	1 741	-43,0	-24,5
SHAANXI	373	1 500	1 272	3 673	-75,1	-65,4
FAW	384	1 327	1 194	2 888	-71,1	-58,7
MAZ	291	504	855	1 354	-42,3	-36,9
URAL	271	358	771	939	-24,3	-17,9
DONGFENG	214	622	648	1 745	-65,6	-62,9
JAC	178	370	594	939	-51,9	-36,7
HOWO	205	435	468	1 180	-52,9	-60,3
FOTON	152	412	464	957	-63,1	-51,5
ISUZU	168	125	456	272	34,4	67,6
SANY	106	215	224	537	-50,7	-58,3
VALDAI	16	2	153	21	700,0	628,6
VOLVO	32	67	142	160	-52,2	-11,2
AMT	52	50	124	137	4,0	-9,5
MERCEDES	15	242	105	826	-93,8	-87,3
ZOOMLION	44	78	97	194	-43,6	-50,0
XU GONG	52	50	94	175	4,0	-46,3
HONGYAN	19	81	65	181	-76,5	-64,1
SCANIA	10	29	56	89	-65,5	-37,1
MAZ MAN	12	5	50	6	140,0	733,3
JMC	9	0	36	0		
DAEWOO	13	50	34	97	-74,0	-64,9
MAN	4	64	33	164	-93,8	-79,9
HYUNDAI	4	23	32	50	-82,6	-36,0
SHANQI	5	0	32	0		
LIUGONG	8	8	23	10	0,0	130,0
CHENGLONG	1	0	15	0		
DAYUN	1	28	14	75	-96,4	-81,3
AMUR	9	0	10	0		
DAF	3	59	10	114	-94,9	-91,2
FORD	1	10	10	12	-90,0	-16,7
BEIBEN	1	11	9	44	-90,9	-79,5
HINO	2	20	8	52	-90,0	-84,6
FUSO	0	6	7	11	-100,0	-36,4
CAMC	0	0	4	0		
IVECO	0	3	4	8	-100,0	-50,0
MZKT	1	0	3	5		-40,0
LIEBHERR	0	0	2	0		
SDAC	1	3	2	9	-66,7	-77,8
BEIFANG BENCHI	0	9	1	26	-100,0	-96,2



TRUCKS

Brand	March 2025	March 2024	3 months 2025	3 months 2024	Change March 2025 vs 2024, %	Change 3 months 2025 vs 2024, %
CHENGLIWEI	1	6	1	6	-83,3	-83,3
KAMAG	1	0	1	0		
ZIL	1	12	1	14	-91,7	-92,9
AVIA	0	5	0	6	-100,0	-100,0
BAW	0	1	0	4	-100,0	-100,0
CHUSHENG	0	1	0	1	-100,0	-100,0
LANDWIND JIANGLING - JMC	0	0	0	1		-100,0
NEFAZ	0	5	0	8	-100,0	-100,0
RENAULT	0	1	0	14	-100,0	-100,0
TATRA	0	0	0	2		-100,0
TOTAL	5 158	11 641	16 603	29 776	-55,7	-44,2
TOTAL Russian brands	2 332	3 078	6 896	7 898	-24,2	-12,7
TOTAL foreign brands	2 826	8 563	9 707	21 878	-67,0	-55,6

Sales of new trucks in Russia in March and 3 months 2025 by type

Type	March 2025	March 2024	3 months 2025	3 months 2024	Market share March 2025, %	Market share March 2024, %	Market share 3 months 2025, %	Market share 3 months 2024, %
Other special equipment	2 909	4 053	8 503	10 096	56,4	34,8	51,2	33,9
Truck-tractor	793	3 425	3 056	8 902	15,4	29,4	18,4	29,9
Other truck types	422	1 434	1 684	3 695	8,2	12,3	10,1	12,4
Dump truck	277	1 016	833	2 643	5,4	8,7	5,0	8,9
Drop-side flat bed	347	895	1 081	2 164	6,7	7,7	6,5	7,3
Refrigerator	110	142	423	599	2,1	1,2	2,6	2,0
Van	112	333	508	817	2,2	2,9	3,1	2,7
Autocrane	96	186	221	479	1,9	1,6	1,3	1,6
Tanker	55	109	186	278	1,1	0,9	1,1	0,9
Mobile repair shop	20	26	78	52	0,4	0,2	0,5	0,2
Refueler	16	21	29	48	0,3	0,2	0,2	0,2
Other	1	1	1	3	0,0	0,0	0,0	0,0
TOTAL	5 158	11 641	16 603	29 776	100,0	100,0	100,0	100,0



TRUCKS

Top 25 model ranking of new truck sales in Russia in March and 3 months 2025

Rank	Model	Brand	March 2025	March 2024	3 months 2025	3 months 2024	Change March 2025 vs 2024, %	Change 3 months 2025 vs 2024, %
1	C7H 6X4	SITRAK	264	400	1 340	1 194	-34,0	12,2
2	43118 6X6	KAMAZ	420	502	1 115	1 300	-16,3	-14,2
3	GAZON NEXT	GAZ	340	555	1 088	1 386	-38,7	-21,5
4	C7H 4X2	SITRAK	195	1 581	1 076	4 312	-87,7	-75,0
5	5490 4X2	KAMAZ	215	224	740	690	-4,0	7,2
6	J6 6X4	FAW	209	507	708	1 251	-58,8	-43,4
7	65115 6X4	KAMAZ	193	307	655	788	-37,1	-16,9
8	4320 6X6	URAL	203	269	571	645	-24,5	-11,5
9	SX 331 8X4	SHAANXI	160	437	507	1 129	-63,4	-55,1
10	ELF	ISUZU	124	100	348	211	24,0	64,9
11	6520 6X4	KAMAZ	94	116	307	305	-19,0	0,7
12	SX 425 6X4	SHAANXI	104	338	285	925	-69,2	-69,2
13	J7 4X2	FAW	88	608	272	1 103	-85,5	-75,3
14	DFH-SERIES	DONGFENG	154	391	265	1 085	-60,6	-75,6
15	KOMPAS 9 4X2	KAMAZ	122	150	251	342	-18,7	-26,6
16	5340 4X2	MAZ	83	134	235	327	-38,1	-28,1
17	C7H 8X4	SITRAK	56	212	226	471	-73,6	-52,0
18	N120	JAC	59	47	225	71	25,5	216,9
19	6312 6X4	MAZ	63	111	222	344	-43,2	-35,5
20	SX 325 6X4	SHAANXI	26	410	214	919	-93,7	-76,7
21	GX	DONGFENG	6	0	194	0		
22	43253 4X2	KAMAZ	95	70	193	150	35,7	28,7
23	N90	JAC	58	13	181	48	346,2	277,1
24	T5G 6X4	HOWO	50	140	173	328	-64,3	-47,3
25	53605 4X2	KAMAZ	87	51	170	200	70,6	-15,0

3 months 2025

SITRAK C7H 6X2

1 340 units **12,2%**

KAMAZ 43118 6X6

1 115 units **-14,2%**

GAZ GAZON NEXT

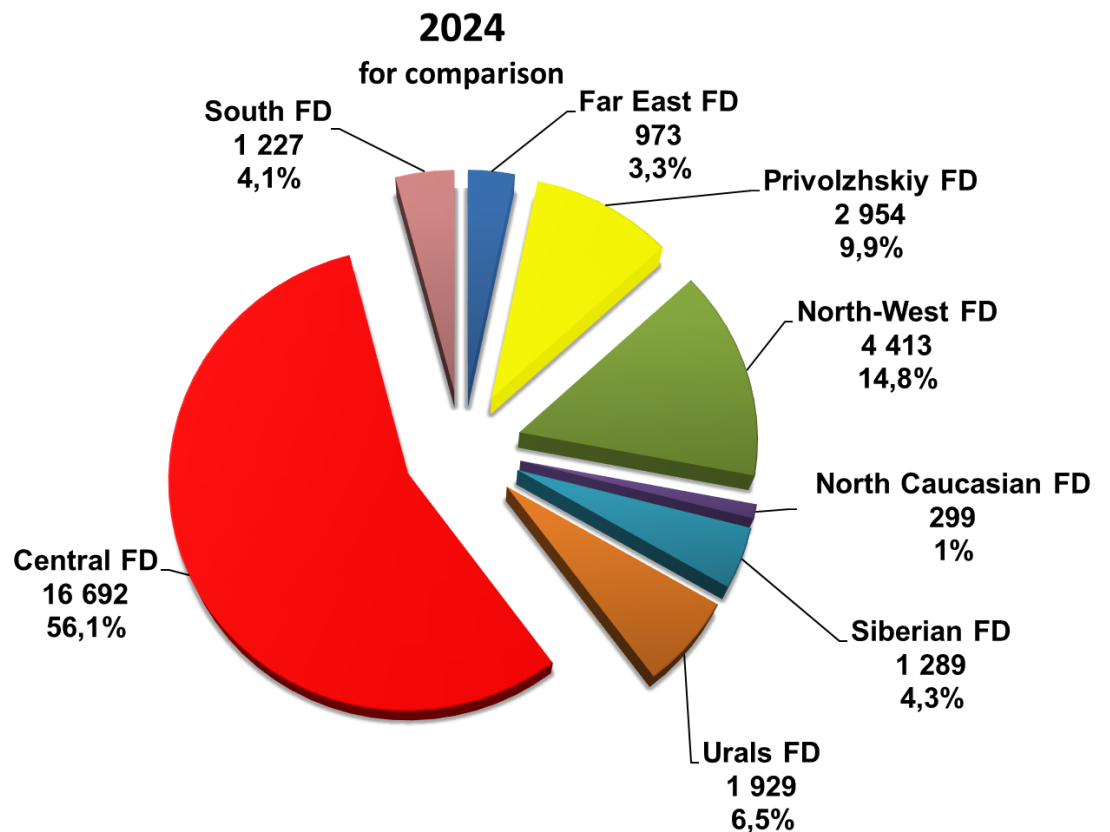
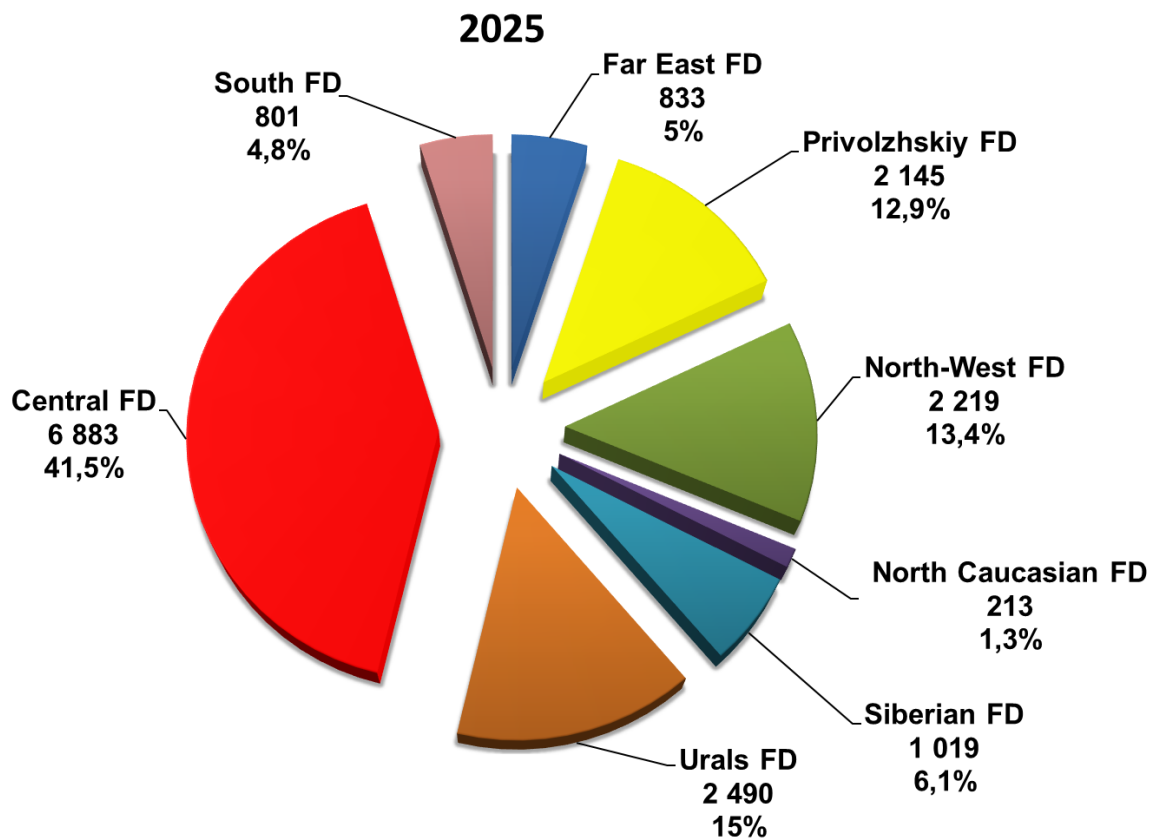
1 088 units **-21,5%**





TRUCKS

Structure of sales of new truck in Russia in 3 months 2025 by Federal District





BUSES

Sales of new buses in Russia in March and 3 months 2025 by brand

Brand	March 2025	March 2024	3 months 2025	3 months 2024	Change March 2025 vs 2024, %	Change 3 months 2025 vs 2024, %
PAZ	401	1 170	1 016	2 475	-65,7	-58,9
YUTONG	98	171	274	401	-42,7	-31,7
LIAZ	71	153	129	530	-53,6	-75,7
KAVZ	33	47	117	188	-29,8	-37,8
NEFAZ	24	250	104	570	-90,4	-81,8
KAMAZ	5	16	97	116	-68,8	-16,4
HIGER	21	57	79	164	-63,2	-51,8
MAZ	24	79	39	226	-69,6	-82,7
GOLDEN DRAGON	19	18	36	30	5,6	20,0
ZHONGTONG	4	22	19	46	-81,8	-58,7
BMZ	13	0	18	0		
URAL	11	14	18	51	-21,4	-64,7
VOLZHANIN	0	79	15	284	-100,0	-94,7
SIMAZ	9	26	9	72	-65,4	-87,5
KING LONG (KLM)	4	7	8	25	-42,9	-68,0
ASIA	0	0	3	0		
LOTOS	3	28	3	93	-89,3	-96,8
NEMAN	1	1	3	6	0,0	-50,0
AVIOR	2	0	2	0		
ASIASTAR	1	0	1	1		0,0
FOTON	1	2	1	2	-50,0	-50,0
BKM	0	0	0	11		-100,0
JAC	0	5	0	23	-100,0	-100,0
SAZ	0	4	0	9	-100,0	-100,0
TOTAL	745	2 149	1 991	5 323	-65,3	-62,6
TOTAL Russian brands	570	1 783	1 526	4 379	-68,0	-65,2
TOTAL foreign brands	175	366	465	944	-52,2	-50,7



BUSES

Sales of new electric buses in Russia in March and 3 months 2025 by brand

Brand / electric buses	March 2025	March 2024	3 months 2025	3 months 2024	Change March 2025 vs 2024, %	Change 3 months 2025 vs 2024, %
KAMAZ	0	16	79	116	-100,0	-31,9
BMZ	13	0	18	0		
LIAZ	1	17	16	77	-94,1	-79,2
NEFAZ	0	54	0	73	-100,0	-100,0
VOLZHANIN	0	6	0	22	-100,0	-100,0
BKM	0	0	0	11		-100,0
TOTAL	14	93	113	299	-84,9	-62,2
TOTAL Russian brands	14	93	113	288	-84,9	-60,8
TOTAL foreign brands	0	0	0	11		-100,0



BUSES

Top 25 model ranking of new bus sales in March and 3 months 2025

Rank	Model	Brand	March 2025	March 2024	3 months 2025	3 months 2024	Change March 2025 vs 2024, %	Change 3 months 2025 vs 2024, %
1	4234	PAZ	150	258	364	571	-41,9	-36,3
2	3205	PAZ	142	348	358	933	-59,2	-61,6
3	VECTOR NEXT	PAZ	101	530	270	894	-80,9	-69,8
4	6127	YUTONG	65	67	166	162	-3,0	2,5
5	5299, 5297 4X2	NEFAZ, KAMAZ	23	242	103	525	-90,5	-80,4
6	4238	KAVZ	30	26	100	75	15,4	33,3
7	CITYMAX 12	LIAZ	55	0	98	0		
8	6282	KAMAZ	0	16	79	116	-100,0	-31,9
9	6122	YUTONG	9	65	44	140	-86,2	-68,6
10	XML	GOLDEN DRAGON	17	18	32	23	-5,6	39,1
11	KLQ 6129	HIGER	7	34	32	78	-79,4	-59,0
12	6899	YUTONG	7	19	31	22	-63,2	40,9
13	203	MAZ	17	16	30	79	6,2	-62,0
14	KLQ-SERIES	HIGER	11	6	22	22	83,3	0,0
15	KLQ 6128	HIGER	3	14	22	27	-78,6	-18,5
16	LCK-SERIES	ZHONGTONG	4	22	19	46	-81,8	-58,7
17	5298 SIRIUS	BMZ	13	0	18	0		
18	VEGA	KAMAZ	5	0	18	0		
19	3255 4320 6X6	URAL	11	14	18	51	-21,4	-64,7
20	4292	LIAZ	16	16	16	112	0,0	-85,7
21	MININ 625600	LIAZ	0	1	15	16	-100,0	-6,2
22	3204	PAZ	2	2	13	4	0,0	225,0
23	6116	YUTONG	3	3	13	3	0,0	333,3
24	4235	KAVZ	1	11	12	57	-90,9	-78,9
25	2258	SIMAZ	9	26	9	72	-65,4	-87,5

3 months 2025

PAZ 4234

364 units **-36,3%**

PAZ 3205

358 units **-61,6%**



PAZ VECTOR NEXT

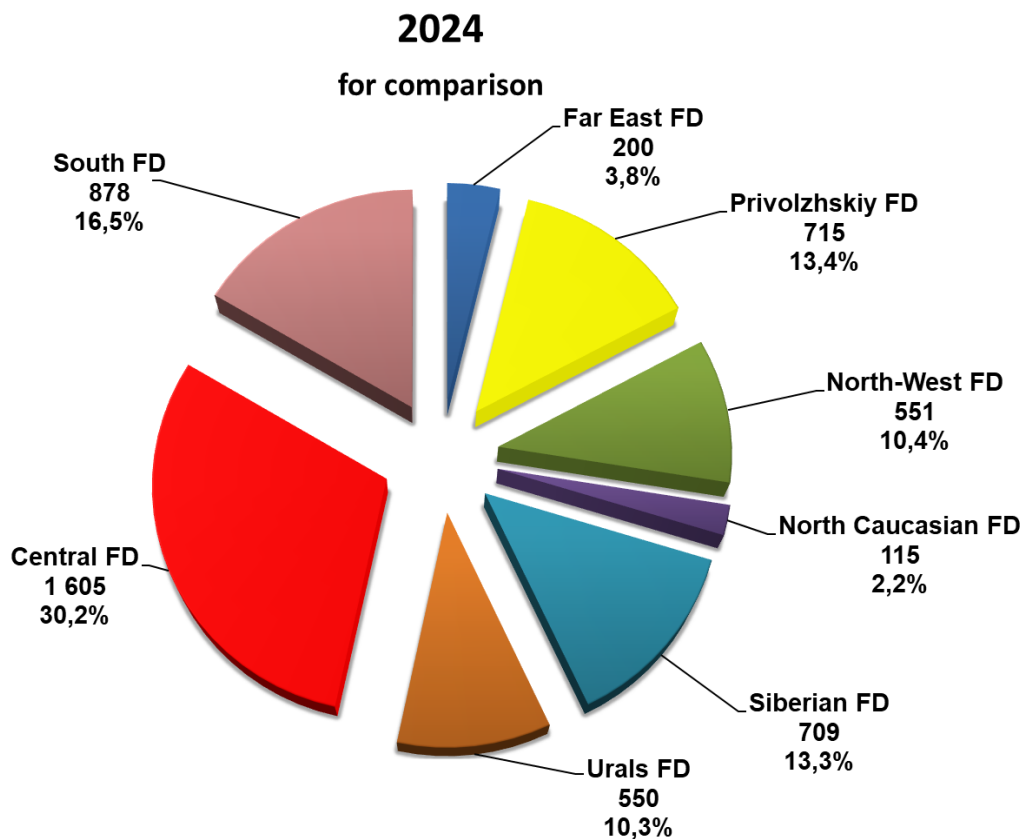
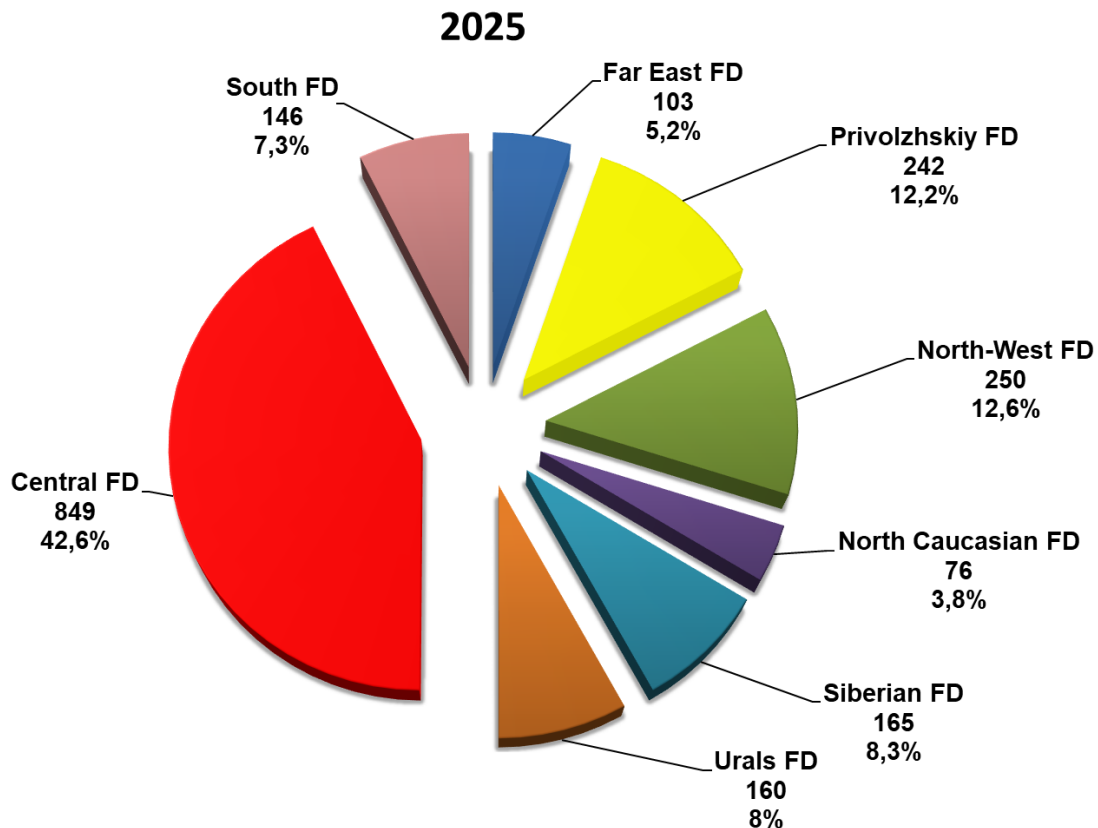
270 units **-69,8%**





BUSES

Structure of new bus sales in Russia in 3 months 2025 by Federal District



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