



13 MAY 2025

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

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

- Trucks (except light trucks, N1 category) including special-purpose vehicles – 4 985 units in April 2025, down 55.7% YOY; 21 588 units in January-April 2025, down 47.4% YOY.
- Buses and coaches (except minibuses, M2 category) – 938 units in April 2025, down 56.5% YOY; 2 929 units in January-April 2025, down 60.8% YOY.

Among them – electric buses: 3 units in April 2025, down 95.3% YOY; 116 units in January-April 2025, down 68.0% 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 April 2025 continued the downturn and declined by 56% year-over-year to 4 985 units. In comparison with March 2025, the sales in April 2025 fell by 3%. 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 four months of 2025 decreased by 47% in comparison with the same period of the last year – to 21 588 units. Sales of foreign-branded trucks in the first four months of 2025 showed a decline by 58% (to 12 498 units) as compared with January-April 2024, while sales of domestically branded new trucks lost only 19 percent (to 9 090 units). The share of foreign brands in January-April 2025 is 58% of the market.

KAMAZ was the best-selling brand in January-April 2025 (6 016 sales), exceeding by 1.9 times the sales of SITRAK, the second best-selling brand. The share of KAMAZ brand is 28% of the market.

In April 2025, bus sales declined by 57% year-on-year (while the decline in March 2025 was 65% YOY), and in the first four months 2025 the bus sales fell by 61% YOY to 2 929 vehicles. The share of domestic brands in April 2025 and in the first four months of 2025 was 77% of the new bus market. Sales of electric buses in the first four months of this year fell by 68% to 116 units.

The best-selling bus brand in January-April 2025 is PAZ with 1 408 vehicles being sold (down 59.5%), gaining a 48% market share.

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TRUCKS

Sales of new trucks in Russia in April and 4 months 2025 by brand, inclusive of special-purpose vehicles

Brand	April 2025	April 2024	4 months 2025	4 months 2024	Change April 2025 vs 2024, %	Change 4 months 2025 vs 2024, %
KAMAZ	1 494	2 164	6 016	7 202	-31,0	-16,5
SITRAK	529	1 395	3 171	7 386	-62,1	-57,1
GAZ	409	701	1 724	2 442	-41,7	-29,4
SHAANXI	281	1 324	1 553	4 997	-78,8	-68,9
FAW	335	1 182	1 529	4 070	-71,7	-62,4
MAZ	281	524	1 136	1 878	-46,4	-39,5
URAL	233	362	1 004	1 301	-35,6	-22,8
DONGFENG	260	789	908	2 534	-67,0	-64,2
JAC	131	401	725	1 340	-67,3	-45,9
HOWO	205	395	673	1 575	-48,1	-57,3
ISUZU	206	171	662	443	20,5	49,4
FOTON	161	471	625	1 428	-65,8	-56,2
SANY	78	386	302	923	-79,8	-67,3
VALDAI	38	38	191	59	0,0	223,7
VOLVO	20	118	162	278	-83,1	-41,7
XU GONG	66	49	160	224	34,7	-28,6
ZOOMLION	62	95	159	289	-34,7	-45,0
AMT	11	20	135	157	-45,0	-14,0
MERCEDES	16	278	121	1 104	-94,2	-89,0
MAZ MAN	57	0	107	6		1 683,3
HONGYAN	11	84	76	265	-86,9	-71,3
SCANIA	13	40	69	129	-67,5	-46,5
JMC	11	0	47	0		
MAN	10	33	43	197	-69,7	-78,2
SHANQI	10	0	42	0		
DAEWOO	7	42	41	139	-83,3	-70,5
LIUGONG	17	4	40	14	325,0	185,7
HYUNDAI	2	24	34	74	-91,7	-54,1
AMUR	8	0	18	0		
DAYUN	4	18	18	93	-77,8	-80,6
CHENGLONG	1	0	16	0		
FORD	3	8	13	20	-62,5	-35,0
BEIBEN	3	22	12	66	-86,4	-81,8
DAF	1	50	11	164	-98,0	-93,3
HINO	3	14	11	66	-78,6	-83,3
FUSO	1	13	8	24	-92,3	-66,7
CAMC	0	0	4	0		
IVECO	0	0	4	8		-50,0
BEIFANG BENCHI	2	12	3	38	-83,3	-92,1
MZKT	0	0	3	5		-40,0
RENAULT	3	4	3	18	-25,0	-83,3
SDAC	1	0	3	9		-66,7



TRUCKS

Brand	April 2025	April 2024	4 months 2025	4 months 2024	Change April 2025 vs 2024, %	Change 4 months 2025 vs 2024, %
LIEBHERR	0	0	2	0		
CHENGLIWEI	0	1	1	7	-100,0	-85,7
KAMAG	0	0	1	0		
LOTOS	1	0	1	0		
ZIL	0	0	1	14		-92,9
AVIA	0	7	0	13	-100,0	-100,0
BAW	0	0	0	4		-100,0
CHUSHENG	0	0	0	1		-100,0
FARIZON	0	2	0	2	-100,0	-100,0
KOLUMAN	0	1	0	1	-100,0	-100,0
LANDWIND JIANGLING - JMC	0	0	0	1		-100,0
NEFAZ	0	2	0	10	-100,0	-100,0
QINGLING	0	2	0	2	-100,0	-100,0
TATRA	0	2	0	4	-100,0	-100,0
TOTAL	4 985	11 248	21 588	41 024	-55,7	-47,4
TOTAL Russian brands	2 194	3 287	9 090	11 185	-33,3	-18,7
TOTAL foreign brands	2 791	7 961	12 498	29 839	-64,9	-58,1

Sales of new trucks in Russia in April and 4 months 2025 by type

Type	April 2025	April 2024	4 months 2025	4 months 2024	Market share April 2025, %	Market share April 2024, %	Market share 4 months 2025, %	Market share 4 months 2024, %
Other special equipment	2 733	4 239	11 236	14 335	54,8	37,7	52,1	34,9
Truck-tractor	616	2 797	3 672	11 699	12,4	24,9	17,0	28,5
Other truck types	494	1 528	2 178	5 223	9,9	13,6	10,1	12,7
Dump truck	389	816	1 470	2 980	7,8	7,3	6,8	7,3
Drop-side flat bed	330	975	1 163	3 618	6,6	8,7	5,4	8,8
Refrigerator	122	248	545	847	2,5	2,2	2,5	2,1
Van	128	321	636	1 138	2,6	2,9	3,0	2,8
Autocrane	99	177	320	656	2,0	1,6	1,5	1,6
Tanker	47	118	233	396	0,9	1,1	1,1	1,0
Mobile repair shop	17	11	95	63	0,3	0,1	0,4	0,2
Refueler	9	15	38	63	0,2	0,1	0,2	0,2
Other	1	3	2	6	0,0	0,0	0,0	0,0
TOTAL	4 985	11 248	21 588	41 024	100,0	100,0	100,0	100,0



TRUCKS

Top 25 model ranking of new truck sales in Russia in April and 4 months 2025

Rank	Model	Brand	April 2025	April 2024	4 months 2025	4 months 2024	Change April 2025 vs 2024, %	Change 4 months 2025 vs 2024, %
1	43118 6X6	KAMAZ	470	390	1 585	1 690	20,5	-6,2
2	C7H 6X4	SITRAK	170	399	1 510	1 593	-57,4	-5,2
3	GAZON NEXT	GAZ	341	554	1 429	1 940	-38,4	-26,3
4	C7H 4X2	SITRAK	273	896	1 349	5 208	-69,5	-74,1
5	J6 6X4	FAW	206	512	914	1 763	-59,8	-48,2
6	65115 6X4	KAMAZ	249	297	904	1 085	-16,2	-16,7
7	5490 4X2	KAMAZ	114	328	854	1 018	-65,2	-16,1
8	4320 6X6	URAL	153	234	724	879	-34,6	-17,6
9	SX 331 8X4	SHAANXI	119	378	626	1 507	-68,5	-58,5
10	ELF	ISUZU	146	134	494	345	9,0	43,2
11	DFH-SERIES	DONGFENG	174	479	439	1 564	-63,7	-71,9
12	6520 6X4	KAMAZ	113	135	420	440	-16,3	-4,5
13	SX 425 6X4	SHAANXI	81	207	366	1 132	-60,9	-67,7
14	KOMPAS 9 4X2	KAMAZ	88	87	339	429	1,1	-21,0
15	J7 4X2	FAW	53	435	325	1 538	-87,8	-78,9
16	5340 4X2	MAZ	90	119	325	446	-24,4	-27,1
17	C7H 8X4	SITRAK	86	100	312	571	-14,0	-45,4
18	N120	JAC	64	75	289	146	-14,7	97,9
19	6312 6X4	MAZ	58	115	280	459	-49,6	-39,0
20	43253 4X2	KAMAZ	83	86	276	236	-3,5	16,9
21	T5G 6X4	HOWO	80	106	253	434	-24,5	-41,7
22	N90	JAC	42	32	223	80	31,2	178,8
23	53605 4X2	KAMAZ	53	74	223	274	-28,4	-18,6
24	SX 325 6X4	SHAANXI	9	448	223	1 367	-98,0	-83,7
25	OLLIN	FOTON	71	115	214	406	-38,3	-47,3

4 months 2025

KAMAZ 43118 6X6

1 585 units **-6,2%**

SITRAK C7H 6X2

1 510 units **-5,2%**

GAZ GAZON NEXT

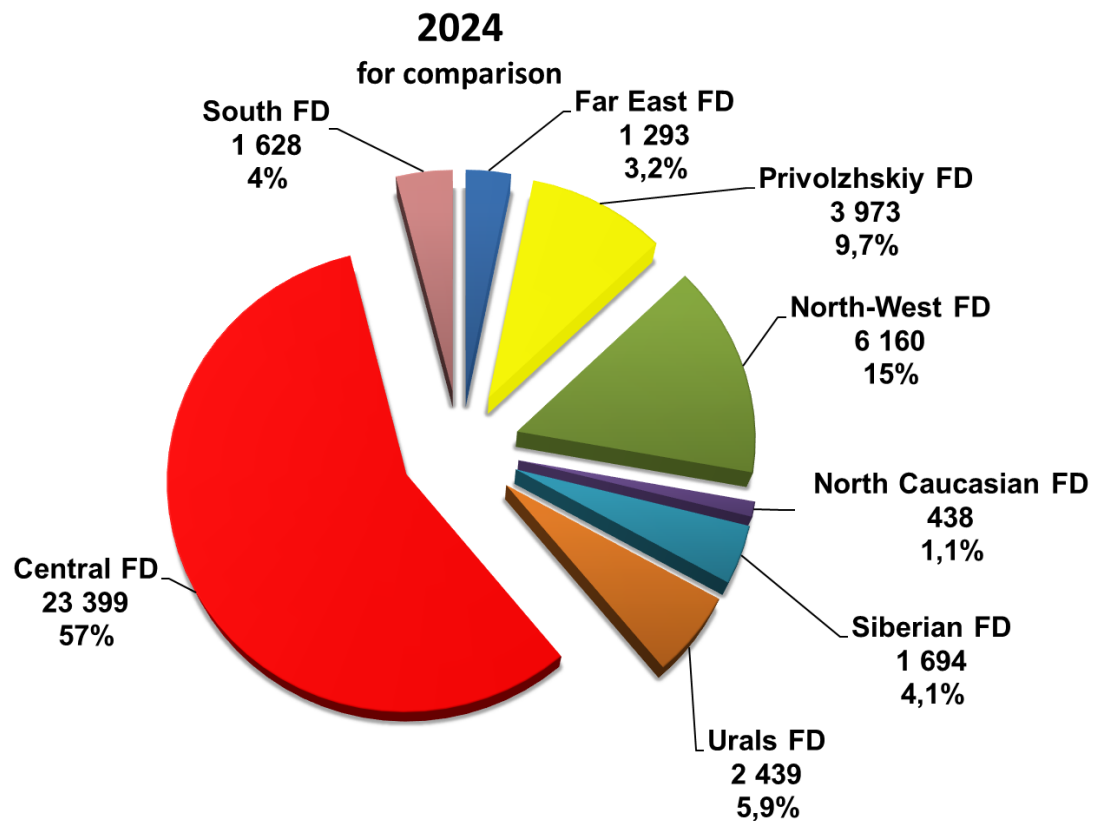
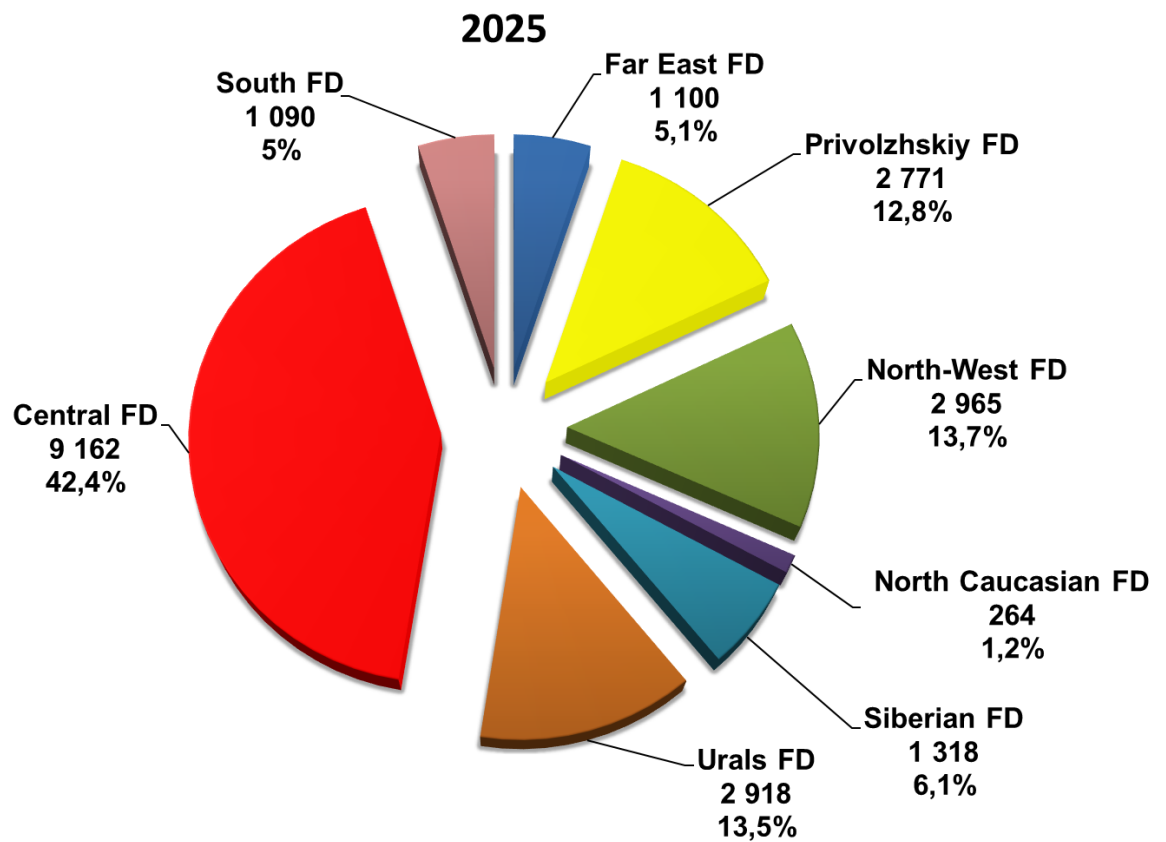
1 429 units **-26,3%**





TRUCKS

Structure of sales of new truck in Russia in 4 months 2025 by Federal District





BUSES

Sales of new buses in Russia in April and 4 months 2025 by brand

Brand	April 2025	April 2024	4 months 2025	4 months 2024	Change April 2025 vs 2024, %	Change 4 months 2025 vs 2024, %
PAZ	392	1 000	1 408	3 475	-60,8	-59,5
YUTONG	88	268	362	669	-67,2	-45,9
LIAZ	164	376	293	906	-56,4	-67,7
NEFAZ	69	168	173	738	-58,9	-76,6
KAVZ	16	32	133	220	-50,0	-39,5
HIGER	52	46	131	210	13,0	-37,6
KAMAZ	2	49	99	165	-95,9	-40,0
VOLZHANIN	69	57	84	341	21,1	-75,4
MAZ	35	46	74	272	-23,9	-72,8
GOLDEN DRAGON	18	30	54	60	-40,0	-10,0
ZHONGTONG	14	17	33	63	-17,6	-47,6
BMZ	2	0	20	0		
URAL	2	14	20	65	-85,7	-69,2
KING LONG (KLM)	6	11	14	36	-45,5	-61,1
SIMAZ	0	16	9	88	-100,0	-89,8
BZKT	4	0	4	0		
ASIA	0	0	3	0		
AVIOR	1	0	3	0		
LOTOS	0	7	3	100	-100,0	-97,0
NEMAN	0	2	3	8	-100,0	-62,5
ASIASTAR	1	0	2	1		100,0
FOTON	1	0	2	2		0,0
MAN	2	0	2	0		
BKM	0	0	0	11		-100,0
JAC	0	2	0	25	-100,0	-100,0
SAZ	0	16	0	25	-100,0	-100,0
TOYOTA	0	1	0	1	-100,0	-100,0
TOTAL	938	2 158	2 929	7 481	-56,5	-60,8
TOTAL Russian brands	720	1 719	2 246	6 098	-58,1	-63,2
TOTAL foreign brands	218	439	683	1 383	-50,3	-50,6



BUSES

Sales of new electric buses in Russia in April and 4 months 2025 by brand

Brand / electric buses	April 2025	April 2024	4 months 2025	4 months 2024	Change April 2025 vs 2024, %	Change 4 months 2025 vs 2024, %
KAMAZ	1	49	80	165	-98,0	-51,5
BMZ	2	0	20	0		
LIAZ	0	15	16	92	-100,0	-82,6
NEFAZ	0	0	0	73		-100,0
VOLZHANIN	0	0	0	22		-100,0
BKM	0	0	0	11		-100,0
TOTAL	3	64	116	363	-95,3	-68,0
TOTAL Russian brands	3	64	116	352	-95,3	-67,0
TOTAL foreign brands	0	0	0	11		-100,0



BUSES

Top 25 model ranking of new bus sales in April and 4 months 2025

Rank	Model	Brand	April 2025	April 2024	4 months 2025	4 months 2024	Change April 2025 vs 2024, %	Change 4 months 2025 vs 2024, %
1	3205	PAZ	125	293	483	1 226	-57,3	-60,6
2	4234	PAZ	111	156	475	727	-28,8	-34,7
3	VECTOR NEXT	PAZ	155	528	425	1 422	-70,6	-70,1
4	6127	YUTONG	54	113	220	275	-52,2	-20,0
5	CITYMAX 12	LIAZ	89	306	187	306	-70,9	-38,9
6	5299, 5297 4X2	NEFAZ, KAMAZ	64	155	167	680	-58,7	-75,4
7	4238	KAVZ	13	21	113	96	-38,1	17,7
8	4292	LIAZ	75	70	91	182	7,1	-50,0
9	6282	KAMAZ	1	49	80	165	-98,0	-51,5
10	VOLGABUS	VOLZHANIN	61	11	65	54	454,5	20,4
11	KLQ 6129	HIGER	25	18	57	96	38,9	-40,6
12	203	MAZ	27	7	57	86	285,7	-33,7
13	6899	YUTONG	24	22	55	44	9,1	25,0
14	6122	YUTONG	9	70	53	210	-87,1	-74,8
15	XML	GOLDEN DRAGON	17	27	49	50	-37,0	-2,0
16	KLQ-SERIES	HIGER	23	4	45	26	475,0	73,1
17	LCK-SERIES	ZHONGTONG	14	17	33	63	-17,6	-47,6
18	KLQ 6128	HIGER	3	16	25	43	-81,2	-41,9
19	5298 SIRIUS	BMZ	2	0	20	0		
20	3255 4320 6X6	URAL	2	14	20	65	-85,7	-69,2
21	VEGA	KAMAZ	1	0	19	0		
22	206 - 226	MAZ	8	14	16	59	-42,9	-72,9
23	4235	KAVZ	3	7	15	64	-57,1	-76,6
24	MININ 625600	LIAZ	0	0	15	16		-6,2
25	3204	PAZ	1	3	14	7	-66,7	100,0

4 months 2025

PAZ 3205

483 units **-60,6%**

PAZ 4234

475 units **-34,7%**



PAZ VECTOR NEXT

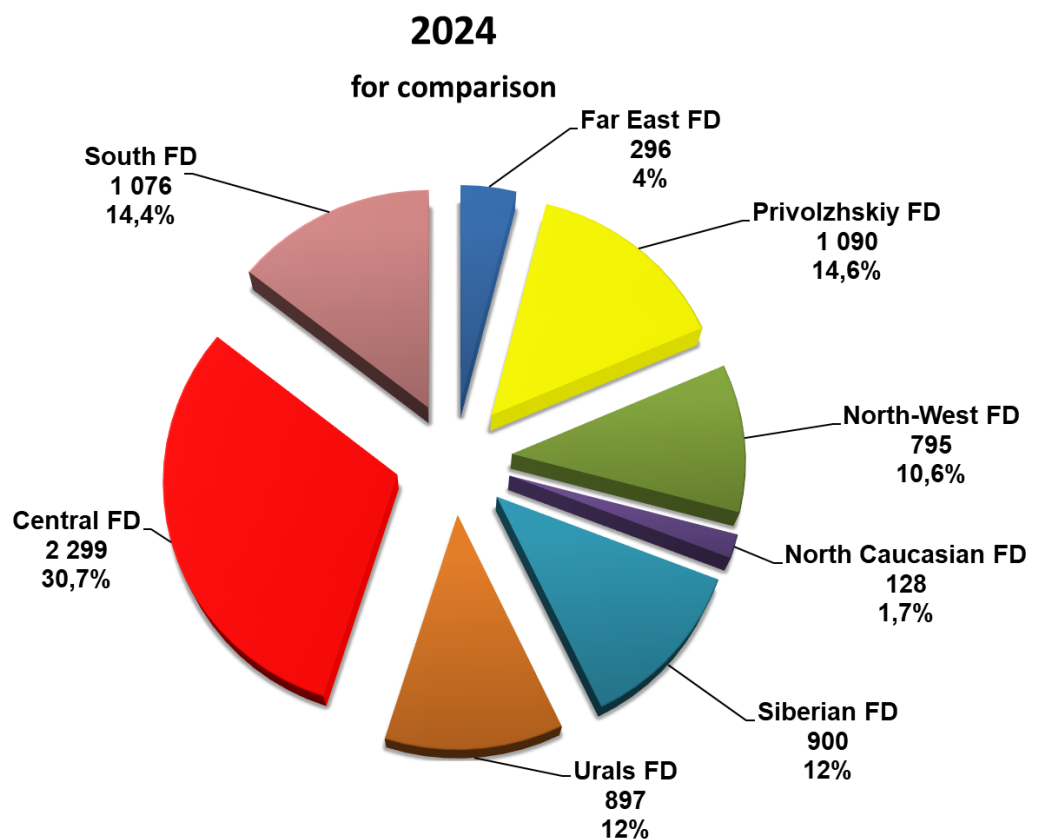
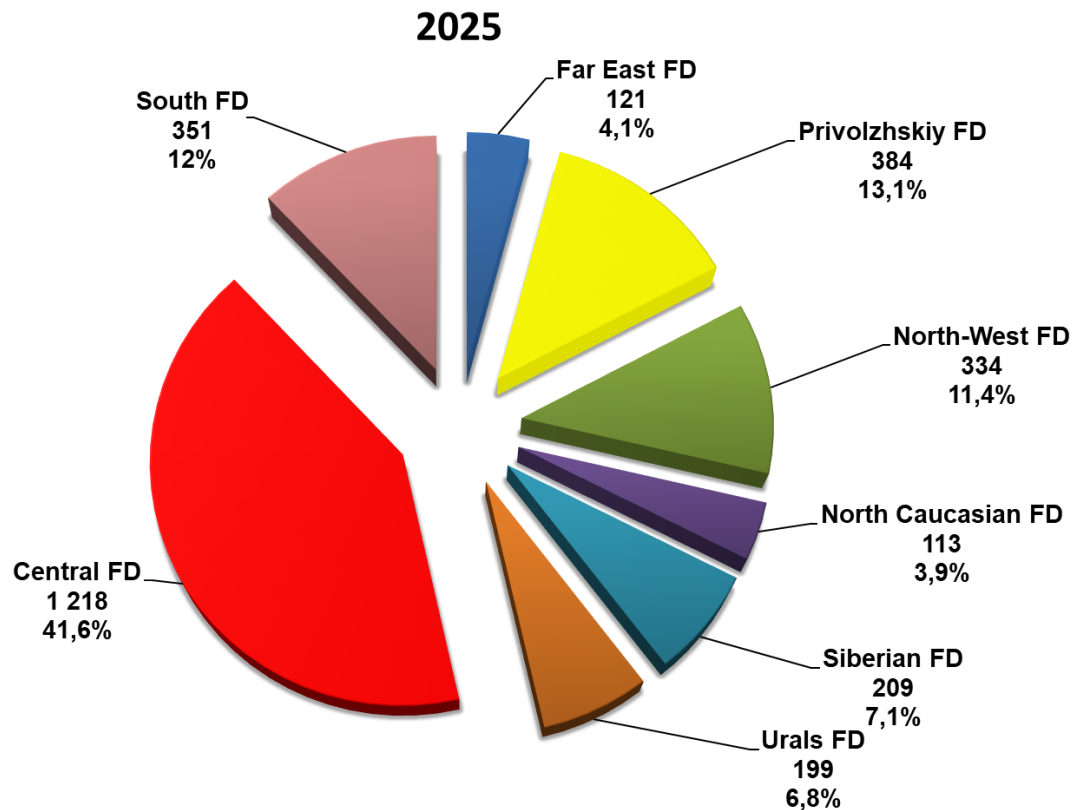
425 units **-70,1%**





BUSES

Structure of new bus sales in Russia in 4 months 2025 by Federal District



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