



11 JUNE 2025

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

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

- Trucks (except light trucks, N1 category) including special-purpose vehicles – 3 728 units in May 2025, down 61.0% YOY; 25 316 units in January-May 2025, down 49.9% YOY.
- Buses and coaches (except minibuses, M2 category) – 642 units in May 2025, down 50.9% YOY; 3 571 units in January-May 2025, down 59.4% YOY.

Among them – electric buses: 4 units in May 2025, down 91.5% YOY; 120 units in January-May 2025, down 70.7% 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 May 2025 continued the downturn and declined by 61% year-over-year. The May holidays (May-Day and V-Day) and the market situation caused a record fall of sales in May (down 25% from 4 985 units in April to 3 728 units in May). The year-to-date sales of new trucks fell by 50% to 25 316 vehicles.

Sales of foreign-branded trucks in the first five months of 2025 showed a decline by 61% (to 14 469 units) as compared with January-May 2024, while sales of domestically branded new trucks lost only 22 percent (to 10 847 units). The share of foreign brands in January-April 2025 is 57% of the market.

KAMAZ was the best-selling brand in January-May 2025 (7 027 sales, down 20%), exceedingly twice the sales of SITRAK, the second best-selling brand with 3 518 trucks sold (down 59%). The third position is taken by GAZ brand (2 089 sales, down 31%). The share of KAMAZ brand is 28% of the market. By our estimation, a sharp fall of the market was contributed by the Central Bank's high key rate continuously maintained and resulted in slowing down business activities and industrial production.

The May holidays and the market situation have also caused a record fall of new bus sales in May vs. April 2025, down 32% from 938 units in April to 642 units in May. In May 2025, total bus sales fell by 51% year-on-year and by 59% year-to-date, to 3 571 vehicles. Sales of domestic brands in May fell by 56%, while sales of foreign brands lost 32%. The share of domestic brands in the first five months of 2025 was 75% of the new bus market. The best-selling bus brand in the first five months of 2025 is PAZ with 1 694 vehicles being sold (down 58%), gaining a 47% market share.

Sales of electric buses in January-May 2025 fell by 71% to 120 vehicles.

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TRUCKS

Sales of new trucks in Russia in April May and 5 months 2025 by brand, inclusive of special-purpose vehicles

Brand	May 2025	May 2024	5 months 2025	5 months 2024	Change May 2025 vs 2024, %	Change 5 months 2025 vs 2024, %
KAMAZ	1 191	1 812	7 207	9 014	-34,3	-20,0
SITRAK	347	1 260	3 518	8 646	-72,5	-59,3
GAZ	365	598	2 089	3 040	-39,0	-31,3
FAW	238	976	1 767	5 046	-75,6	-65,0
SHAANXI	177	1 087	1 730	6 084	-83,7	-71,6
MAZ	266	451	1 402	2 329	-41,0	-39,8
URAL	127	290	1 131	1 591	-56,2	-28,9
DONGFENG	115	700	1 023	3 234	-83,6	-68,4
HOWO	179	511	852	2 086	-65,0	-59,2
ISUZU	167	124	829	567	34,7	46,2
JAC	104	411	829	1 751	-74,7	-52,7
FOTON	97	316	722	1 744	-69,3	-58,6
SANY	80	224	382	1 147	-64,3	-66,7
VALDAI	49	22	240	81	122,7	196,3
ZOOMLION	50	100	209	389	-50,0	-46,3
XU GONG	47	63	207	287	-25,4	-27,9
VOLVO	18	88	180	366	-79,5	-50,8
AMT	9	7	144	164	28,6	-12,2
MERCEDES	10	207	131	1 311	-95,2	-90,0
MAZ MAN	18	1	125	7	1 700,0	1 685,7
HONGYAN	1	54	77	319	-98,1	-75,9
SCANIA	4	33	73	162	-87,9	-54,9
JMC	5	0	52	0		
DAEWOO	6	24	47	163	-75,0	-71,2
MAN	3	26	46	223	-88,5	-79,4
LIUGONG	5	7	45	21	-28,6	114,3
SHANQI	3	0	45	0		
HYUNDAI	8	24	42	98	-66,7	-57,1
DAYUN	4	15	22	108	-73,3	-79,6
AMUR	1	0	19	0		
CHENGLONG	3	0	19	0		
SIMAZ	15	0	15	0		
BEIBEN	2	6	14	72	-66,7	-80,6
DAF	2	28	13	192	-92,9	-93,2
FORD	0	1	13	21	-100,0	-38,1
HINO	2	15	13	81	-86,7	-84,0
FUSO	4	9	12	33	-55,6	-63,6
BEIFANG BENCHI	4	12	7	50	-66,7	-86,0
CAMC	0	1	4	1	-100,0	300,0
IVECO	0	0	4	8		-50,0
RENAULT	1	4	4	22	-75,0	-81,8
MZKT	0	2	3	7	-100,0	-57,1



TRUCKS

Brand	May 2025	May 2024	5 months 2025	5 months 2024	Change May 2025 vs 2024, %	Change 5 months 2025 vs 2024, %
SDAC	0	2	3	11	-100,0	-72,7
LIEBHERR	0	0	2	0		
CHENGLIWEI	0	1	1	8	-100,0	-87,5
GREEN	1	0	1	0		
KAMAG	0	0	1	0		
LOTOS	0	0	1	0		
ZIL	0	1	1	15	-100,0	-93,3
AVIA	0	18	0	31	-100,0	-100,0
BAW	0	1	0	5	-100,0	-100,0
C&C	0	7	0	7	-100,0	-100,0
CHUSHENG	0	0	0	1		-100,0
FARIZON	0	0	0	2		-100,0
HUBEU	0	1	0	1	-100,0	-100,0
KOLUMAN	0	0	0	1		-100,0
LANDWIND JIANGLING - JMC	0	0	0	1		-100,0
NEFAZ	0	1	0	11	-100,0	-100,0
QINGLING	0	7	0	9	-100,0	-100,0
TATRA	0	0	0	4		-100,0
TOTAL	3 728	9 548	25 316	50 572	-61,0	-49,9
TOTAL Russian brands	1 757	2 731	10 847	13 916	-35,7	-22,1
TOTAL foreign brands	1 971	6 817	14 469	36 656	-71,1	-60,5

Sales of new trucks in Russia in May and 5 months 2025 by type

Type	May 2025	May 2024	5 months 2025	5 months 2024	Market share May 2025, %	Market share May 2024, %	Market share 5 months 2025, %	Market share 5 months 2024, %
Other special equipment	2 107	3 662	13 343	17 997	56,5	38,4	52,7	35,6
Truck-tractor	421	2 225	4 093	13 924	11,3	23,3	16,2	27,5
Other truck types	303	1 358	2 481	6 581	8,1	14,2	9,8	13,0
Dump truck	295	753	1 765	3 733	7,9	7,9	7,0	7,4
Drop-side flat bed	229	719	1 392	4 337	6,1	7,5	5,5	8,6
Refrigerator	85	223	721	1 361	2,3	2,3	2,9	2,7
Van	163	357	708	1 204	4,4	3,7	2,8	2,4
Autocrane	61	133	381	789	1,6	1,4	1,5	1,6
Tanker	41	85	274	481	1,1	0,9	1,1	1,0
Mobile repair shop	14	28	109	91	0,4	0,3	0,4	0,2
Refueler	8	4	46	67	0,2	0,0	0,2	0,1
Other	1	1	3	7	0,0	0,0	0,0	0,0
TOTAL	3 728	9 548	25 316	50 572	100,0	100,0	100,0	100,0



TRUCKS

Top 25 model ranking of new truck sales in Russia in May and 5 months 2025

Rank	Model	Brand	May 2025	May 2024	5 months 2025	5 months 2024	Change May 2025 vs 2024, %	Change 5 months 2025 vs 2024, %
1	43118 6X6	KAMAZ	295	352	1 880	2 042	-16,2	-7,9
2	GAZON NEXT	GAZ	289	478	1 718	2 418	-39,5	-28,9
3	C7H 6X4	SITRAK	158	310	1 668	1 903	-49,0	-12,3
4	C7H 4X2	SITRAK	146	839	1 495	6 047	-82,6	-75,3
5	65115 6X4	KAMAZ	195	281	1 099	1 366	-30,6	-19,5
6	J6 6X4	FAW	158	411	1 072	2 174	-61,6	-50,7
7	5490 4X2	KAMAZ	121	415	975	1 433	-70,8	-32,0
8	4320 6X6	URAL	102	168	826	1 047	-39,3	-21,1
9	SX 331 8X4	SHAANXI	82	352	708	1 859	-76,7	-61,9
10	ELF	ISUZU	129	82	623	427	57,3	45,9
11	6520 6X4	KAMAZ	56	80	476	520	-30,0	-8,5
12	DFH-SERIES	DONGFENG	1	509	440	2 073	-99,8	-78,8
13	KOMPAS 9 4X2	KAMAZ	94	91	433	520	3,3	-16,7
14	5340 4X2	MAZ	77	102	402	548	-24,5	-26,6
15	SX 425 6X4	SHAANXI	32	167	398	1 299	-80,8	-69,4
16	C7H 8X4	SITRAK	43	111	355	682	-61,3	-47,9
17	J7 4X2	FAW	25	382	350	1 920	-93,5	-81,8
18	53605 4X2	KAMAZ	114	74	337	348	54,1	-3,2
19	N120	JAC	43	4	332	150	975,0	121,3
20	43253 4X2	KAMAZ	56	55	332	291	1,8	14,1
21	6312 6X4	MAZ	42	126	322	585	-66,7	-45,0
22	T5G 6X4	HOWO	46	91	299	525	-49,5	-43,0
23	T5G 4X2	HOWO	82	0	271	128		111,7
24	GX	DONGFENG	61	0	263	0		
25	N90	JAC	35	247	258	327	-85,8	-21,1

5 months 2025

KAMAZ 43118 6X6

1 880 units **-7,9%**

GAZ GAZON NEXT

1 718 units **-28,9%**



SITRAK C7H 6X2

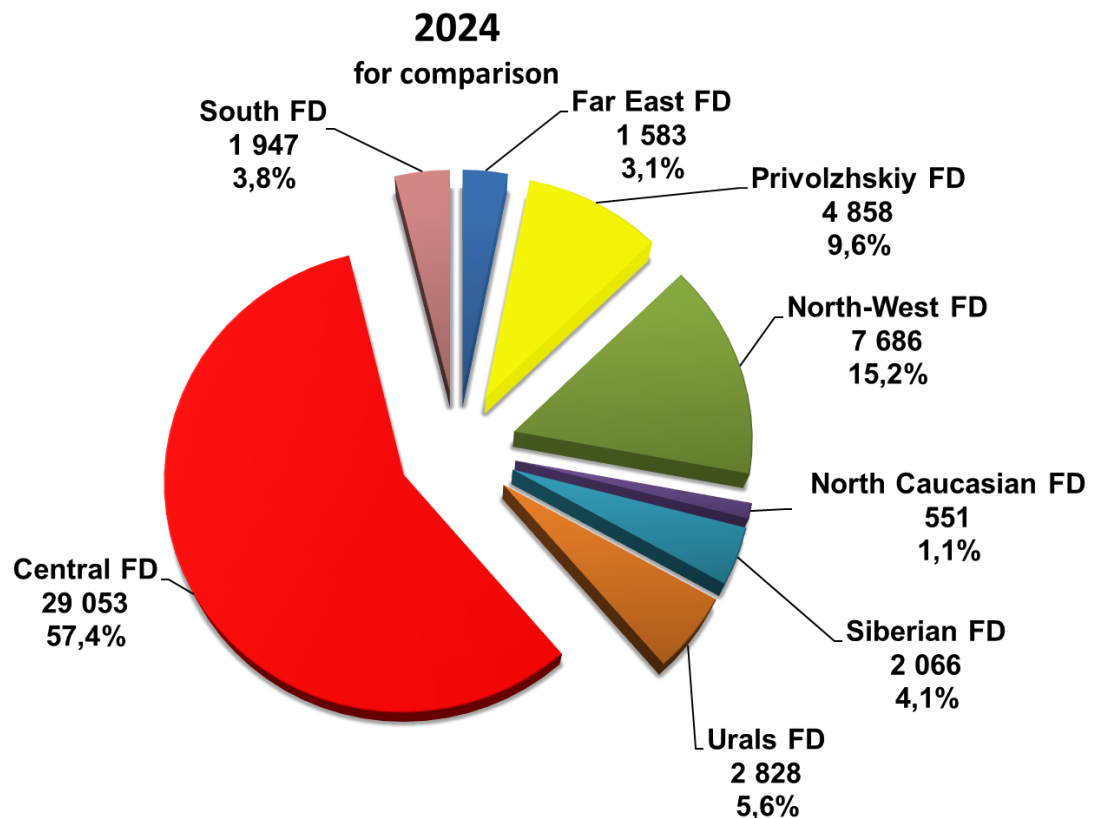
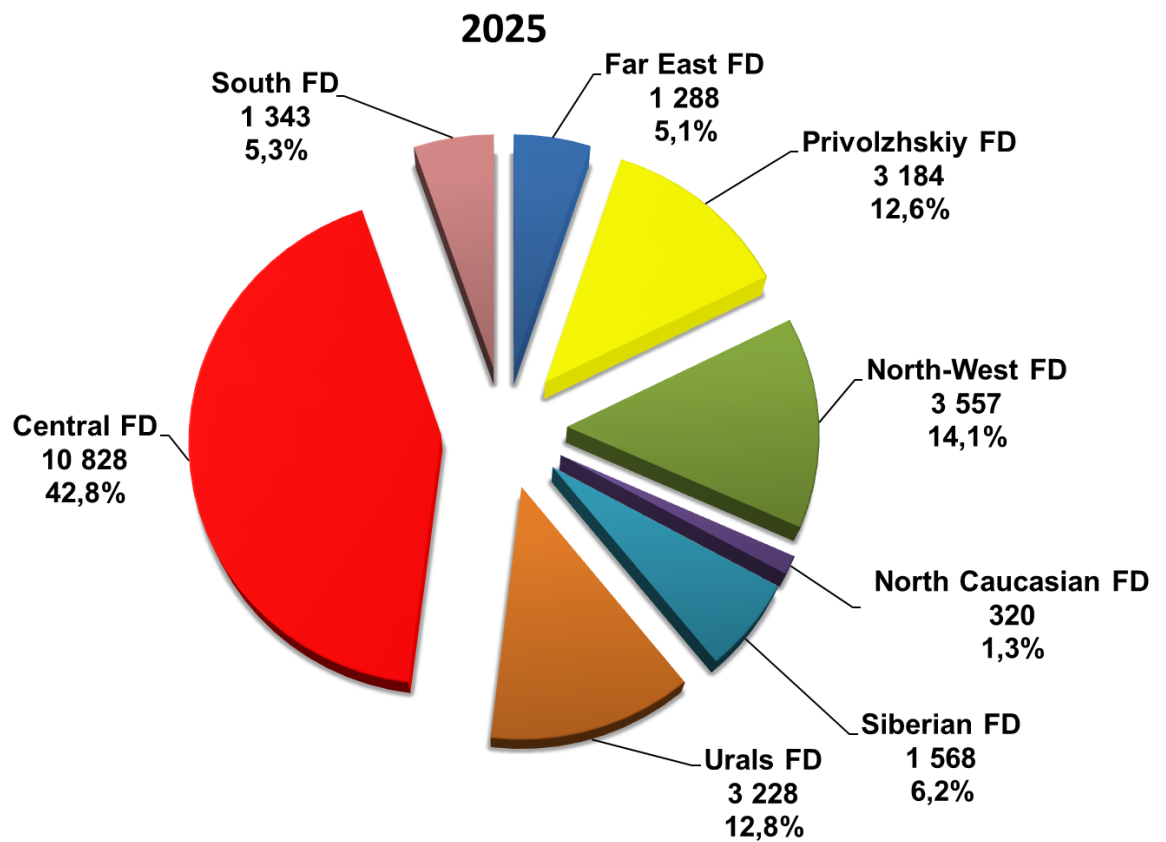
1 668 units **-12,3%**





TRUCKS

Structure of sales of new truck in Russia in 5 months 2025 by Federal District





BUSES

Sales of new buses in Russia in May and 5 months 2025 by brand

Brand	May 2025	May 2024	5 months 2025	5 months 2024	Change May 2025 vs 2024, %	Change 5 months 2025 vs 2024, %
PAZ	286	587	1 694	4 062	-51,3	-58,3
YUTONG	103	198	465	867	-48,0	-46,4
LIAZ	71	165	364	1 071	-57,0	-66,0
NEFAZ	25	57	198	795	-56,1	-75,1
HIGER	28	38	159	248	-26,3	-35,9
KAVZ	21	39	154	259	-46,2	-40,5
MAZ	43	8	117	280	437,5	-58,2
KAMAZ	12	37	111	202	-67,6	-45,0
VOLZHANIN	23	82	107	423	-72,0	-74,7
GOLDEN DRAGON	5	23	59	83	-78,3	-28,9
ZHONGTONG	11	18	44	81	-38,9	-45,7
URAL	4	16	24	81	-75,0	-70,4
BMZ	0	1	20	1	-100,0	1 900,0
KING LONG (KLM)	1	6	15	42	-83,3	-64,3
SIMAZ	0	23	9	111	-100,0	-91,9
ASIASTAR	5	0	7	1		600,0
NEMAN	3	2	6	10	50,0	-40,0
AVIOR	1	0	4	0		
BZKT	0	0	4	0		
ASIA	0	0	3	0		
LOTOS	0	6	3	106	-100,0	-97,2
FOTON	0	0	2	2		0,0
MAN	0	0	2	0		
BKM	0	0	0	11		-100,0
JAC	0	2	0	27	-100,0	-100,0
SAZ	0	0	0	25		-100,0
TOYOTA	0	0	0	1		-100,0
TOTAL	642	1 308	3 571	8 789	-50,9	-59,4
TOTAL Russian brands	442	1 013	2 688	7 111	-56,4	-62,2
TOTAL foreign brands	200	295	883	1 678	-32,2	-47,4



BUSES

Sales of new electric buses in Russia in May and 5 months 2025 by brand

Brand / electric buses	May 2025	May 2024	5 months 2025	5 months 2024	Change May 2025 vs 2024, %	Change 5 months 2025 vs 2024, %
KAMAZ	4	37	84	202	-89,2	-58,4
BMZ	0	1	20	1	-100,0	1900,0
LIAZ	0	9	16	101	-100,0	-84,2
NEFAZ	0	0	0	73		-100,0
VOLZHANIN	0	0	0	22		-100,0
BKM	0	0	0	11		-100,0
TOTAL	4	47	120	410	-91,5	-70,7
TOTAL Russian brands	4	47	120	399	-91,5	-69,9
TOTAL foreign brands	0	0	0	11		-100,0



BUSES

Top 25 model ranking of new bus sales in May and 5 months 2025

Rank	Model	Brand	May 2025	May 2024	5 months 2025	5 months 2024	Change May 2025 vs 2024, %	Change 5 months 2025 vs 2024, %
1	3205	PAZ	85	168	568	1 394	-49,4	-59,3
2	4234	PAZ	76	90	551	817	-15,6	-32,6
3	VECTOR NEXT	PAZ	121	323	546	1 745	-62,5	-68,7
4	6127	YUTONG	57	74	277	349	-23,0	-20,6
5	CITYMAX 12	LIAZ	61	156	248	462	-60,9	-46,3
6	5299, 5297 4X2	NEFAZ, KAMAZ	24	40	191	720	-40,0	-73,5
7	4238	KAVZ	20	33	133	129	-39,4	3,1
8	203	MAZ	43	2	100	88	2 050,0	13,6
9	4292	LIAZ	0	9	91	191	-100,0	-52,4
10	6282	KAMAZ	0	37	80	202	-100,0	-60,4
11	VOLGABUS	VOLZHANIN	13	29	78	83	-55,2	-6,0
12	6899	YUTONG	6	26	61	70	-76,9	-12,9
13	KLQ 6129	HIGER	0	16	57	112	-100,0	-49,1
14	6122	YUTONG	2	62	55	272	-96,8	-79,8
15	KLQ-SERIES	HIGER	8	22	53	48	-63,6	10,4
16	XML	GOLDEN DRAGON	3	20	52	70	-85,0	-25,7
17	LCK-SERIES	ZHONGTONG	11	18	44	81	-38,9	-45,7
18	KLQ 6128	HIGER	4	0	29	43		-32,6
19	3255 4320 6X6	URAL	4	16	24	81	-75,0	-70,4
20	6128	YUTONG	15	8	24	33	87,5	-27,3
21	5298 SIRIUS	BMZ	0	0	20	0		
22	VEGA	KAMAZ	1	0	20	0		
23	6116	YUTONG	6	12	19	36	-50,0	-47,2
24	KLQ 6119	HIGER	16	0	18	18		0,0
25	6852	YUTONG	13	2	17	17	550,0	0,0

5 months 2025

PAZ 3205

568 units **-59,3%**

PAZ 4234

551 units **-32,6%**



PAZ VECTOR NEXT

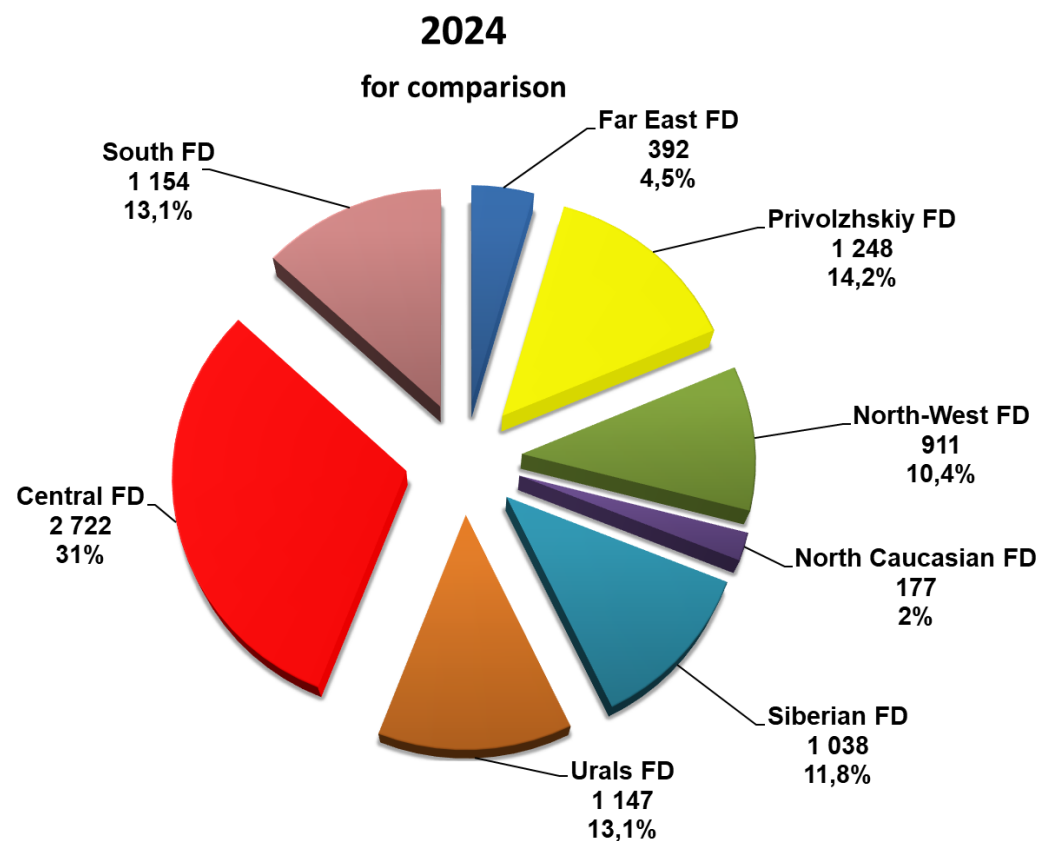
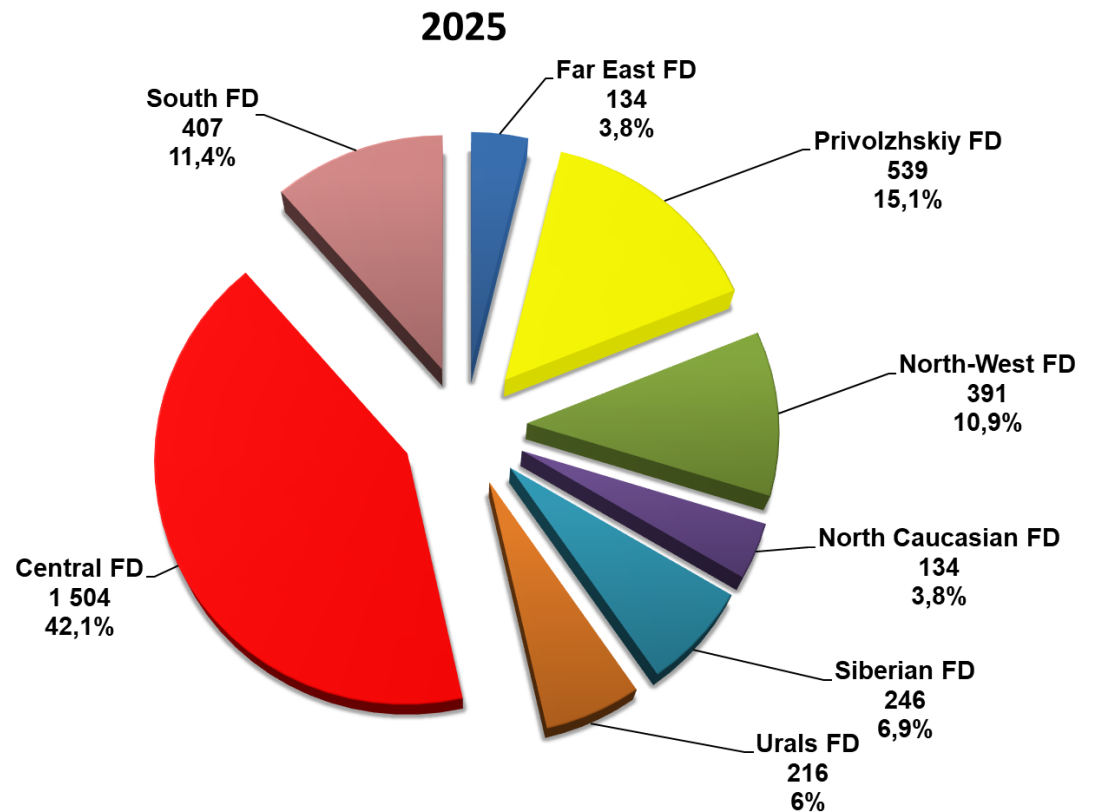
546 units **-68,7%**





BUSES

Structure of new bus sales in Russia in 5 months 2025 by Federal District



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