



11 AUGUST 2025

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

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

- Trucks (except light trucks, N1 category) including special-purpose vehicles – 4 796 units in July 2025, down 58.4% YOY; 33 931 units in January-July 2025, down 53.5% YOY.
- Buses and coaches (except minibuses, M2 category) – 883 units in July 2025, down 43.7% YOY; 5 064 units in January-July 2025, down 57.5% YOY.

Among them – electric buses: 34 units in July 2025, down 38.2% YOY; 182 units in January-July 2025, down 67.9% 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 July 2025 continued the downturn and declined by 58% year-over-year to 4 796 units. The year-to-date sales of new trucks fell by 53.5% to 33 931 vehicles.

The second half of 2025 starts with a 25% growth of sales over the result of June 2025. We hope that the second half of the year will see a continuing trend of sales growth. Sales of foreign-branded trucks in the first seven months of 2025 showed a decline by 63.5% (to 19 425 units) as compared with January-July 2024, while sales of domestically branded new trucks lost only 26,1 percent (to 14 506 units). The share of foreign brands in January-July 2025 reduced to 52% of the market (vs. 57% in H1 2025).

KAMAZ was the best-selling brand in January-July 2025 (9 826 sales, down 24%), the result being 2.3 times more than the sales of SITRAK, the second best-selling brand with 4 356 trucks sold (down 64%). The share of KAMAZ brand is 29% of the market.

In July 2025, the bus sales grew by 48% over the result of June 2025, and we hope that the growth of bus sales will continue in the second half of the year. The total bus sales in January-July 2025 were 5 064 vehicles, down 57.5% YOY. Sales of domestic brands in January-July 2025 fell by 59% to 3 826 buses, while sales of foreign brands lost 50% to show 1 238 buses. The share of domestic brands in the first seven months of 2025 was 76% of the new bus market. The best-selling bus brand in the first seven months of 2025 is PAZ with 2398 vehicles sold (down 52%), gaining a 47% market share. Sales of electric buses in January-July 2025 fell by 68% to 182 vehicles.

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TRUCKS

Sales of new trucks in Russia in July and 7 months 2025 by brand, inclusive of special-purpose vehicles

Brand	July 2025	July 2024	7 months 2025	7 months 2024	Change July 2025 vs 2024, %	Change 7 months 2025 vs 2024, %
KAMAZ	1 490	1 921	9 826	12 884	-22,4	-23,7
SITRAK	455	1 741	4 356	12 082	-73,9	-63,9
GAZ	413	628	2 778	4 322	-34,2	-35,7
FAW	304	955	2 324	7 105	-68,2	-67,3
SHAANXI	293	1 509	2 286	8 970	-80,6	-74,5
MAZ	218	487	1 819	3 331	-55,2	-45,4
DONGFENG	226	1 187	1 465	5 127	-81,0	-71,4
URAL	136	211	1 414	1 996	-35,5	-29,2
HOWO	241	769	1 231	3 407	-68,7	-63,9
ISUZU	202	229	1 221	957	-11,8	27,6
JAC	202	335	1 159	2 451	-39,7	-52,7
FOTON	128	349	966	2 465	-63,3	-60,8
SANY	109	229	583	1 583	-52,4	-63,2
ZOOMLION	66	171	336	674	-61,4	-50,1
XU GONG	44	67	304	400	-34,3	-24,0
VALDAI	27	48	278	178	-43,8	56,2
VOLVO	20	78	228	550	-74,4	-58,5
MERCEDES	33	164	188	1 706	-79,9	-89,0
AMT	27	14	181	187	92,9	-3,2
MAZ MAN	16	9	160	22	77,8	627,3
SCANIA	16	43	106	244	-62,8	-56,6
HONGYAN	5	78	85	499	-93,6	-83,0
JMC	10	43	70	43	-76,7	62,8
HYUNDAI	14	10	65	121	40,0	-46,3
LIUGONG	11	9	60	33	22,2	81,8
CHENGLONG	36	2	57	2	1 700,0	2 750,0
DAEWOO	5	23	56	223	-78,3	-74,9
MAN	3	49	55	300	-93,9	-81,7
SHANQI	4	0	50	0		
DAYUN	4	26	38	160	-84,6	-76,2
FUSO	4	5	36	43	-20,0	-16,3
DAF	19	30	32	260	-36,7	-87,7
AMUR	1	2	20	2	-50,0	900,0
BEIBEN	2	14	16	101	-85,7	-84,2
HINO	2	40	16	140	-95,0	-88,6
FORD	0	5	14	31	-100,0	-54,8
NEMO	3	0	9	0		
BEIFANG BENCHI	0	11	7	81	-100,0	-91,4
CAMC	2	0	6	1		500,0
IVECO	2	3	6	12	-33,3	-50,0
NEFAZ	0	0	4	11		-63,6
RENAULT	0	1	4	26	-100,0	-84,6



TRUCKS

Brand	July 2025	July 2024	7 months 2025	7 months 2024	Change July 2025 vs 2024, %	Change 7 months 2025 vs 2024, %
MZKT	0	6	3	13	-100,0	-76,9
SDAC	0	3	3	14	-100,0	-78,6
ZIL	2	19	3	57	-89,5	-94,7
LIEBHERR	0	0	2	0		
AMBERTRUCK	1	0	1	0		
CHENGLIWEI	0	2	1	14	-100,0	-92,9
GREEN	0	0	1	0		
KAMAG	0	0	1	0		
LOTOS	0	0	1	0		
AVIA	0	9	0	50	-100,0	-100,0
BAW	0	2	0	7	-100,0	-100,0
C&C	0	0	0	7		-100,0
CHUSHENG	0	0	0	1		-100,0
FARIZON	0	0	0	2		-100,0
HUBEU	0	0	0	1		-100,0
JINBEI	0	1	0	2	-100,0	-100,0
KERUI	0	2	0	12	-100,0	-100,0
KOLUMAN	0	0	0	1		-100,0
LANDWIND JIANGLING - JMC	0	0	0	1		-100,0
QINGLING	0	0	0	11		-100,0
TATRA	0	0	0	4		-100,0
WANSHAN	0	2	0	2	-100,0	-100,0
TOTAL	4 796	11 541	33 931	72 929	-58,4	-53,5
TOTAL Russian brands	2 097	2 843	14 506	19 637	-26,2	-26,1
TOTAL foreign brands	2 699	8 698	19 425	53 292	-69,0	-63,5

Sales of new trucks in Russia in July and 7 months 2025 by type

Type	July 2025	July 2024	7 months 2025	7 months 2024	Market share July 2025, %	Market share July 2024, %	Market share 7 months 2025, %	Market share 7 months 2024, %
Other special equipment	2 636	4 397	18 088	26 403	55,0	38,1	53,3	36,2
Truck-tractor	588	2 784	5 290	19 594	12,3	24,1	15,6	26,9
Other truck types	526	1 402	3 312	9 340	11,0	12,2	9,8	12,8
Dump truck	336	836	2 364	5 362	7,0	7,2	7,0	7,4
Drop-side flat bed	379	984	1 978	6 237	7,9	8,5	5,8	8,6
Refrigerator	132	303	993	1 908	2,8	2,6	2,9	2,6
Van	57	525	815	2 131	1,2	4,6	2,4	2,9
Autocrane	76	194	518	1 102	1,6	1,7	1,5	1,5
Tanker	49	79	378	629	1,0	0,7	1,1	0,9
Mobile repair shop	8	12	131	113	0,2	0,1	0,4	0,2
Refueler	9	23	60	101	0,2	0,2	0,2	0,1
Other	0	2	4	9	0,0	0,0	0,0	0,0
TOTAL	4 796	11 541	33 931	72 929	100,0	100,0	100,0	100,0



TRUCKS

Top 25 model ranking of new truck sales in Russia in July and 7 months 2025

Rank	Model	Brand	July 2025	July 2024	7 months 2025	7 months 2024	Change July 2025 vs 2024, %	Change 7 months 2025 vs 2024, %
1	43118 6X6	KAMAZ	308	373	2 505	2 767	-17,4	-9,5
2	GAZON NEXT	GAZ	348	478	2 276	3 422	-27,2	-33,5
3	C7H 6X4	SITRAK	202	424	2 011	2 706	-52,4	-25,7
4	C7H 4X2	SITRAK	149	1 103	1 839	8 244	-86,5	-77,7
5	65115 6X4	KAMAZ	302	312	1 584	1 936	-3,2	-18,2
6	J6 6X4	FAW	159	288	1 370	2 967	-44,8	-53,8
7	5490 4X2	KAMAZ	105	308	1 212	2 163	-65,9	-44,0
8	4320 6X6	URAL	90	140	1 002	1 318	-35,7	-24,0
9	SX 331 8X4	SHAANXI	132	567	961	2 944	-76,7	-67,4
10	ELF	ISUZU	145	189	921	731	-23,3	26,0
11	DFH-SERIES	DONGFENG	169	879	755	3 382	-80,8	-77,7
12	6520 6X4	KAMAZ	132	82	677	699	61,0	-3,1
13	KOMPAS 9 4X2	KAMAZ	115	30	590	596	283,3	-1,0
14	SX 425 6X4	SHAANXI	59	203	509	1 689	-70,9	-69,9
15	5340 4X2	MAZ	54	91	506	756	-40,7	-33,1
16	C7H 8X4	SITRAK	104	214	506	1 118	-51,4	-54,7
17	T5G 6X4	HOWO	86	151	482	774	-43,0	-37,7
18	J7 4X2	FAW	67	317	478	2 645	-78,9	-81,9
19	43253 4X2	KAMAZ	75	94	470	460	-20,2	2,2
20	53605 4X2	KAMAZ	79	72	455	472	9,7	-3,6
21	6312 6X4	MAZ	61	135	428	825	-54,8	-48,1
22	N120	JAC	43	95	420	340	-54,7	23,5
23	OLLIN	FOTON	61	106	367	714	-42,5	-48,6
24	T5G 4X2	HOWO	92	31	363	460	196,8	-21,1
25	SADKO NEXT	GAZ	50	77	329	343	-35,1	-4,1

7 months 2025

KAMAZ 43118 6X6

2 505 units **-9,5%**

GAZ GAZON NEXT

2 276 units **-33,5%**



SITRAK C7H 6X2

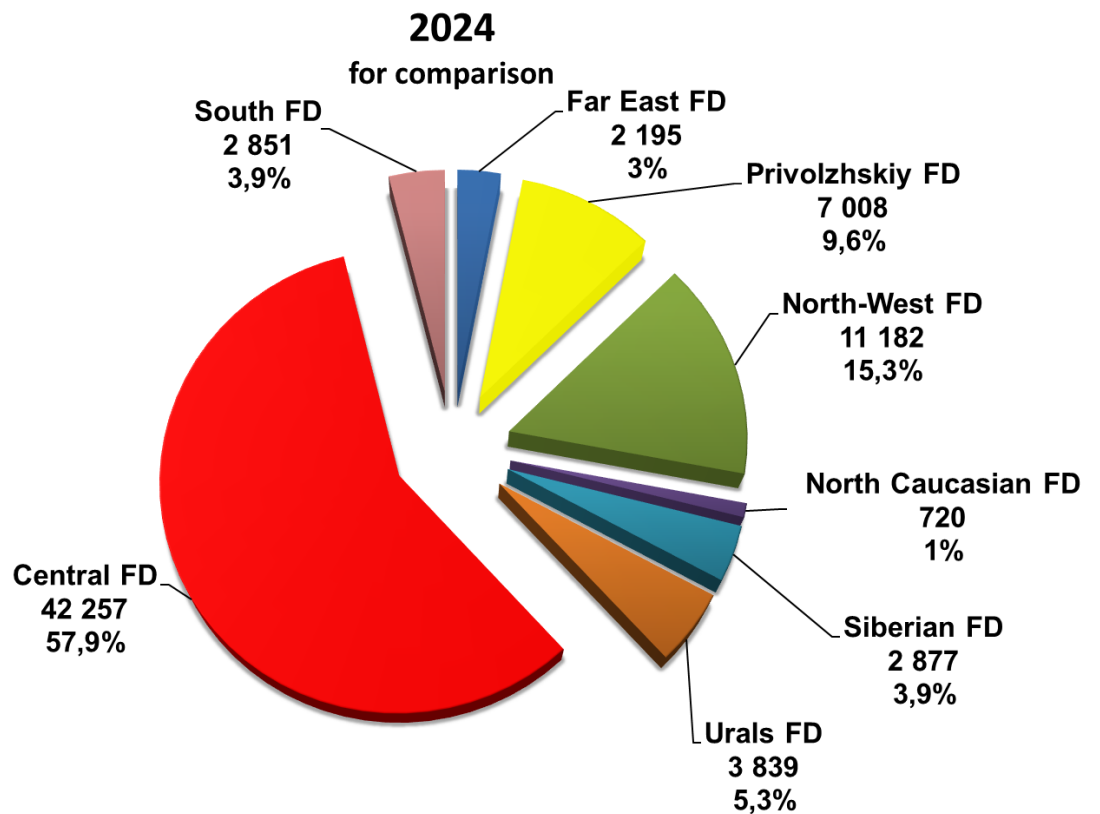
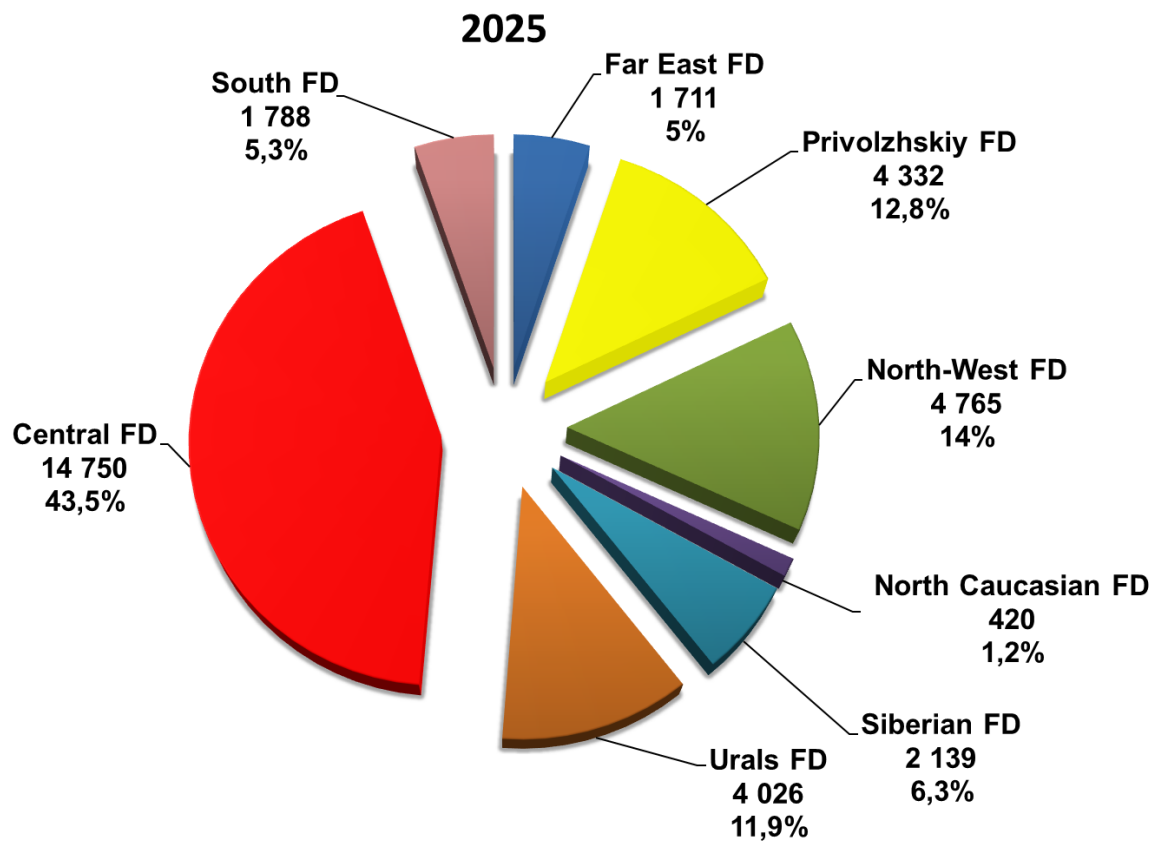
2 011 units **-25,7%**





TRUCKS

Structure of sales of new truck in Russia in 7 months 2025 by Federal District





BUSES

Sales of new buses in Russia in July and 7 months 2025 by brand

Brand	July 2025	July 2024	7 months 2025	7 months 2024	Change July 2025 vs 2024, %	Change 7 months 2025 vs 2024, %
PAZ	413	465	2 398	4 968	-11,2	-51,7
YUTONG	143	249	685	1 350	-42,6	-49,3
LIAZ	36	331	414	1 785	-89,1	-76,8
NEFAZ	66	132	312	1 054	-50,0	-70,4
HIGER	35	75	228	379	-53,3	-39,8
KAVZ	41	99	226	396	-58,6	-42,9
VOLGABUS	67	38	197	482	76,3	-59,1
KAMAZ	38	53	180	342	-28,3	-47,4
MAZ	2	28	134	322	-92,9	-58,4
GOLDEN DRAGON	7	17	73	112	-58,8	-34,8
ZHONGTONG	9	37	69	179	-75,7	-61,5
SIMAZ	18	13	42	139	38,5	-69,8
URAL	2	8	28	91	-75,0	-69,2
BMZ	1	0	21	1		2 000,0
KING LONG (KLM)	0	9	16	63	-100,0	-74,6
ASIASTAR	1	1	8	2	0,0	300,0
NEMAN	0	1	7	11	-100,0	-36,4
AVIOR	1	0	5	0		
LOTOS	0	11	5	160	-100,0	-96,9
BZKT	0	0	4	1		300,0
ASIA	0	0	3	0		
FOTON	0	0	3	2		50,0
MAN	0	0	2	0		
SINARA	2	0	2	0		
JAC	0	0	1	30		-96,7
SOLLERS	1	0	1	0		
BKM	0	0	0	11		-100,0
JIANLING	0	0	0	1		-100,0
SAZ	0	0	0	25		-100,0
SHENLONG	0	1	0	1	-100,0	-100,0
TOYOTA	0	0	0	1		-100,0
TOTAL	883	1 568	5 064	11 908	-43,7	-57,5
TOTAL Russian brands	685	1 150	3 826	9 418	-40,4	-59,4
TOTAL foreign brands	198	418	1 238	2 490	-52,6	-50,3



BUSES

Sales of new electric buses in Russia in July and 7 months 2025 by brand

Brand / electric buses	July 2025	July 2024	7 months 2025	7 months 2024	Change July 2025 vs 2024, %	Change 7 months 2025 vs 2024, %
KAMAZ	30	53	141	342	-43,4	-58,8
BMZ	1	0	21	1		2000,0
LIAZ	1	2	17	118	-50,0	-85,6
SINARA	2	0	2	0		
VOLGABUS	0	0	1	22		-95,5
NEFAZ	0	0	0	73		-100,0
BKM	0	0	0	11		-100,0
TOTAL	34	55	182	567	-38,2	-67,9
TOTAL Russian brands	34	55	182	556	-38,2	-67,3
TOTAL foreign brands	0	0	0	11		-100,0



BUSES

Top 25 model ranking of new bus sales in July and 7 months 2025

Rank	Model	Brand	July 2025	July 2024	7 months 2025	7 months 2024	Change July 2025 vs 2024, %	Change 7 months 2025 vs 2024, %
1	3205	PAZ	148	123	831	1 623	20,3	-48,8
2	4234	PAZ	136	90	760	1 020	51,1	-25,5
3	VECTOR NEXT	PAZ	110	235	751	2 184	-53,2	-65,6
4	6127	YUTONG	100	116	436	572	-13,8	-23,8
5	5299, 5297 4X2	NEFAZ, KAMAZ	57	117	295	946	-51,3	-68,8
6	CITYMAX 12	LIAZ	20	330	282	1 170	-93,9	-75,9
7	4238	KAVZ	32	47	191	203	-31,9	-5,9
8	203	MAZ	2	22	117	121	-90,9	-3,3
9	CITYRITM 12	VOLGABUS	12	0	106	83		27,7
10	4292	LIAZ	0	1	91	197	-100,0	-53,8
11	KLQ 6129	HIGER	14	16	90	145	-12,5	-37,9
12	6899	YUTONG	13	26	85	123	-50,0	-30,9
13	6282	KAMAZ	0	53	80	342	-100,0	-76,6
14	KLQ-SERIES	HIGER	13	9	79	59	44,4	33,9
15	LCK-SERIES	ZHONGTONG	9	37	69	179	-75,7	-61,5
16	XML	GOLDEN DRAGON	4	14	63	92	-71,4	-31,5
17	6122	YUTONG	5	68	62	384	-92,6	-83,9
18	5222	KAMAZ	30	0	61	0		
19	2258	SIMAZ	18	13	42	139	38,5	-69,8
20	4298	VOLGABUS	35	11	42	232	218,2	-81,9
21	KLQ 6128	HIGER	8	29	38	94	-72,4	-59,6
22	6116	YUTONG	17	2	36	65	750,0	-44,6
23	VEGA	KAMAZ	7	0	31	0		
24	CITYRITM 18	VOLGABUS	15	0	31	10		210,0
25	6128	YUTONG	6	11	31	57	-45,5	-45,6

7 months 2025

PAZ 3205

831 units **-48,8%**

PAZ 4234

760 units **-25,5%**



PAZ VECTOR NEXT

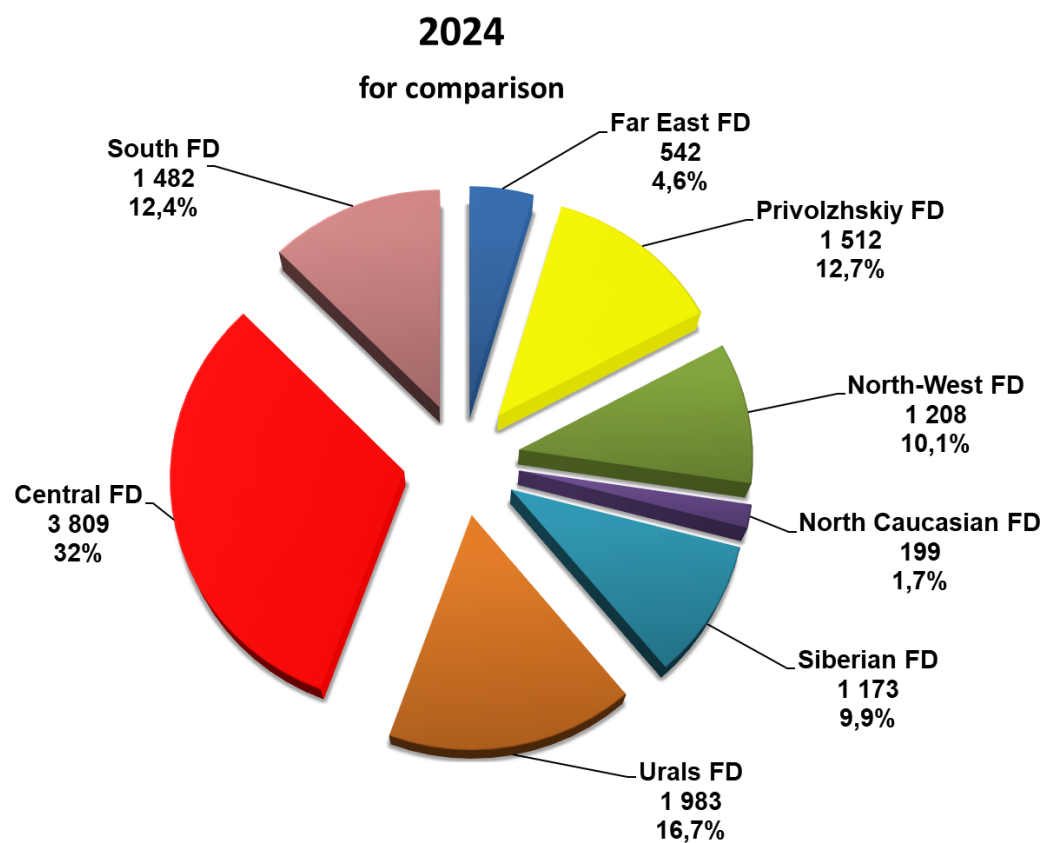
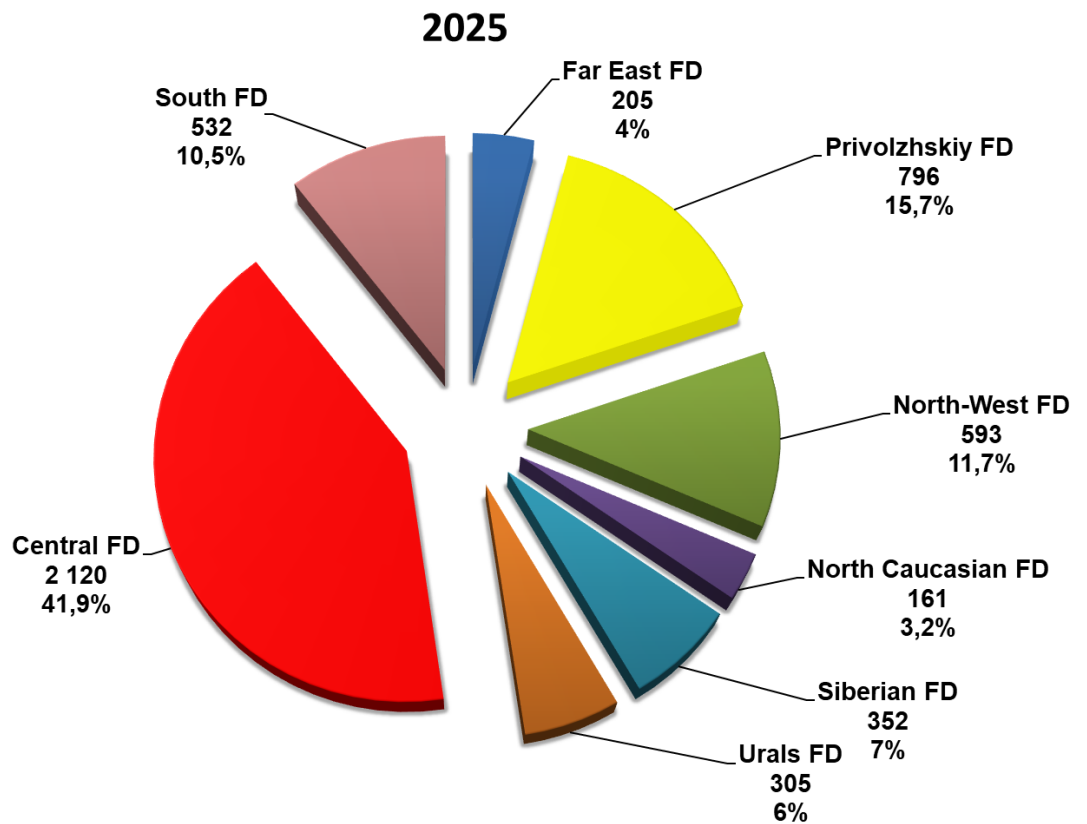
751 units **-65,6%**





BUSES

Structure of new bus sales in Russia in 7 months 2025 by Federal District



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