



12 NOVEMBER 2025

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

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

- Trucks (except light trucks, N1 category) including special-purpose vehicles – 6 411 units in October 2025, down 52.7% YOY; 49 764 units in January-October 2025, down 54.0% YOY.
 - Buses and coaches (except minibuses, M2 category) – 1 398 units in October 2025, down 17.0% YOY; 8 367 units in January-October 2025, down 47.2% YOY.
- Among them – electric buses: 82 units in October 2025, down 44.2% YOY; 423 units in January-October 2025, down 54.1% 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 company, monthly sales of new trucks including special-purpose vehicles fell in October 2025 by 53% year-over-year to 6 411 units, but exceeded the sales result of September 2025 by 40%. The year-to-date sales of new trucks fell by 54% to 49 764 vehicles (vs. 108 080 sales in ten months of 2024).

Sales of domestically branded trucks in January-October 2025 showed a decline by 26% year-on-year to 20 974 units, while sales of foreign-branded trucks lost 64 percent (to 28 790 units). The share of foreign brands in January-October 2025 was 58% of the new truck market.

KAMAZ was the best-selling brand in January-October 2025 (14 317 sales, down 24%), the result being 2.3 times better than the sales of SITRAK, the second best-selling brand with 6 109 trucks sold (down 65%). The third position is taken by SHAANXI (3 998 sales, down 71%), while GAZ brand (3 882 sales, down 37%) has moved to the fourth position. The share of KAMAZ brand is 29% of the market, the best-selling model being KAMAZ 43118 (6X6), with 3 408 trucks sold (down 6%).

In October 2025, the bus sales (1 398 vehicles) grew by record-breaking 45% over the result of September 2025 and declined by 17% vs. October 2024. The total bus sales in January-October 2025 were 8 367 vehicles, down 47% YOY. Sales of domestic brands in January-October 2025 fell by 48% to 6 396 buses, while sales of foreign brands lost 45% to show 1 971 buses. The share of domestic brands in the first ten months of 2025 was 76% of the new bus market. Sales of electric buses in January-October 2025 fell by 54% to 423 vehicles.

The best-selling bus brand in the first ten months of 2025 is PAZ with 3 790 vehicles sold (down 40%), gaining a 45% market share. The best-selling bus model is PAZ VECTOR NEXT (1 307 units sold, down 56%).

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TRUCKS

Sales of new trucks in Russia in October and 10 months 2025 by brand, inclusive of special-purpose vehicles

Brand	October 2025	October 2024	10 months 2025	10 months 2024	Change October 2025 vs 2024, %	Change 10 months 2025 vs 2024, %
KAMAZ	1 675	2 541	14 317	18 742	-34,1	-23,6
SITRAK	1 182	1 959	6 109	17 424	-39,7	-64,9
SHAANXI	484	1 839	3 998	13 857	-73,7	-71,1
GAZ	424	677	3 882	6 156	-37,4	-36,9
FAW	574	1 109	3 508	9 988	-48,2	-64,9
MAZ	335	585	2 595	4 680	-42,7	-44,6
HOWO	233	582	1 886	5 296	-60,0	-64,4
ISUZU	215	264	1 884	1 696	-18,6	11,1
URAL	160	305	1 876	2 725	-47,5	-31,2
DONGFENG	111	1 345	1 780	8 788	-91,7	-79,7
JAC	148	526	1 565	3 703	-71,9	-57,7
FOTON	172	514	1 435	3 743	-66,5	-61,7
SANY	207	229	1 101	2 271	-9,6	-51,5
VALDAI	100	69	560	427	44,9	31,1
ZOOMLION	60	63	500	952	-4,8	-47,5
XU GONG	33	74	406	609	-55,4	-33,3
VOLVO	40	157	309	899	-74,5	-65,6
AMT	35	86	292	297	-59,3	-1,7
MERCEDES	39	207	279	2 147	-81,2	-87,0
MAZ MAN	19	15	218	53	26,7	311,3
SCANIA	19	46	161	367	-58,7	-56,1
LIUGONG	19	13	123	69	46,2	78,3
CHENGLONG	23	21	116	44	9,5	163,6
JMC	21	22	109	143	-4,5	-23,8
HONGYAN	6	105	105	740	-94,3	-85,8
HYUNDAI	7	6	87	143	16,7	-39,2
MAN	11	66	79	437	-83,3	-81,9
DAEWOO	10	27	77	300	-63,0	-74,3
SHANQI	12	8	70	8	50,0	775,0
DAYUN	4	11	58	200	-63,6	-71,0
DAF	8	26	45	350	-69,2	-87,1
FUSO	1	2	39	51	-50,0	-23,5
BEIBEN	2	21	36	151	-90,5	-76,2
AMUR	0	0	26	2		1 200,0
CAMC	11	12	23	14	-8,3	64,3
HINO	3	10	22	186	-70,0	-88,2
FORD	0	12	15	50	-100,0	-70,0
BEIFANG BENCHI	1	6	14	94	-83,3	-85,1
NEMO	0	0	10	0		
IVECO	0	3	6	15	-100,0	-60,0
NEFAZ	0	0	6	11		-45,5
RENAULT	0	0	5	29		-82,8



TRUCKS

Brand	October 2025	October 2024	10 months 2025	10 months 2024	Change October 2025 vs 2024, %	Change 10 months 2025 vs 2024, %
SOLLERS	3	0	5	0		
AMBERTRUCK	2	0	4	0		
ZIL	1	0	4	58		-93,1
MZKT	0	3	3	20	-100,0	-85,0
SDAC	0	0	3	24		-87,5
BAW	1	0	2	7		-71,4
LIEBHERR	0	0	2	0		
LOTOS	0	0	2	0		
CHENGLIWEI	0	0	1	17		-94,1
DS DESA	0	0	1	0		
GREEN	0	0	1	0		
KAMAG	0	0	1	0		
LANDWIND JIANGLING - JMC	0	0	1	1		0,0
SKYWELL	0	0	1	0		
WANSHAN	0	0	1	2		-50,0
AVIA	0	0	0	50		-100,0
C&C	0	0	0	7		-100,0
CHUSHENG	0	0	0	1		-100,0
FARIZON	0	0	0	2		-100,0
FTAF	0	1	0	1	-100,0	-100,0
HUBEU	0	0	0	2		-100,0
JINBEI	0	0	0	2		-100,0
KERUI	0	0	0	13		-100,0
KOLUMAN	0	0	0	1		-100,0
QINGLING	0	0	0	11		-100,0
TATRA	0	0	0	4		-100,0
TOTAL	6 411	13 567	49 764	108 080	-52,7	-54,0
TOTAL Russian brands	2 400	3 679	20 974	28 419	-34,8	-26,2
TOTAL foreign brands	4 011	9 888	28 790	79 661	-59,4	-63,9

Sales of new trucks in Russia in October and 10 months 2025 by type

Type	October 2025	October 2024	10 months 2025	10 months 2024	Market share October 2025, %	Market share October 2024, %	Market share 10 months 2025, %	Market share 10 months 2024, %
Other special equipment	2 909	4 891	25 879	39 044	45,4	36,1	52,0	36,1
Truck-tractor	945	3 645	7 740	28 560	14,7	26,9	15,6	26,4
Other truck types	463	2 018	4 646	14 227	7,2	14,9	9,3	13,2
Dump truck	407	931	3 374	7 718	6,4	6,9	6,8	7,1
Drop-side flat bed	630	981	3 261	9 012	9,8	7,2	6,6	8,3
Refrigerator	710	343	2 028	2 993	11,1	2,5	4,1	2,8
Van	194	503	1 334	3 837	3,0	3,7	2,7	3,6
Autocrane	97	151	759	1 523	1,5	1,1	1,5	1,4
Tanker	38	79	491	853	0,6	0,6	1,0	0,8
Mobile repair shop	8	12	157	157	0,1	0,1	0,3	0,2
Refueler	8	12	89	144	0,1	0,1	0,2	0,1
Other	2	1	6	12	0,0	0,0	0,0	0,0
TOTAL	6 411	13 567	49 764	108 080	100,0	100,0	100,0	100,0



TRUCKS

Top 25 model ranking of new truck sales in Russia in October and 10 months 2025

Rank	Model	Brand	October 2025	October 2024	10 months 2025	10 months 2024	Change October 2025 vs 2024, %	Change 10 months 2025 vs 2024, %
1	43118 6X6	KAMAZ	271	392	3 408	3 638	-30,9	-6,3
2	GAZON NEXT	GAZ	357	547	3 238	4 904	-34,7	-34,0
3	C7H 6X4	SITRAK	868	633	2 990	4 306	37,1	-30,6
4	C7H 4X2	SITRAK	243	1 092	2 476	11 467	-77,7	-78,4
5	65115 6X4	KAMAZ	290	364	2 392	2 814	-20,3	-15,0
6	J6 6X4	FAW	375	472	2 176	4 225	-20,6	-48,5
7	5490 4X2	KAMAZ	289	761	1 873	3 591	-62,0	-47,8
8	SX 331 8X4	SHAANXI	186	665	1 546	4 732	-72,0	-67,3
9	ELF	ISUZU	166	210	1 428	1 318	-21,0	8,3
10	4320 6X6	URAL	103	243	1 318	1 884	-57,6	-30,0
11	6520 6X4	KAMAZ	161	111	1 080	943	45,0	14,5
12	SX 418 4X2	SHAANXI	136	377	1 059	2 402	-63,9	-55,9
13	53605 4X2	KAMAZ	101	39	802	615	159,0	30,4
14	T5G 4X2	HOWO	96	326	801	1 201	-70,6	-33,3
15	KOMPAS 9 4X2	KAMAZ	65	36	781	714	80,6	9,4
16	DFH-SERIES	DONGFENG	7	1 012	779	6 223	-99,3	-87,5
17	43253 4X2	KAMAZ	149	87	752	707	71,3	6,4
18	SX 425 6X4	SHAANXI	84	272	730	2 334	-69,1	-68,7
19	5340 4X2	MAZ	75	145	645	1 020	-48,3	-36,8
20	C7H 8X4	SITRAK	71	228	643	1 630	-68,9	-60,6
21	6312 6X4	MAZ	104	177	636	1 201	-41,2	-47,0
22	T5G 6X4	HOWO	99	155	606	1 559	-36,1	-61,1
23	N120	JAC	51	322	565	879	-84,2	-35,7
24	J6 6X6	FAW	119	44	526	360	170,5	46,1
25	J7 4X2	FAW	12	458	521	3 804	-97,4	-86,3

10 months 2025

KAMAZ 43118 6X6

3 408 units **-6,3%**

SITRAK C7H 6X4

2 290 units **-30,6%**

GAZ GAZON NEXT

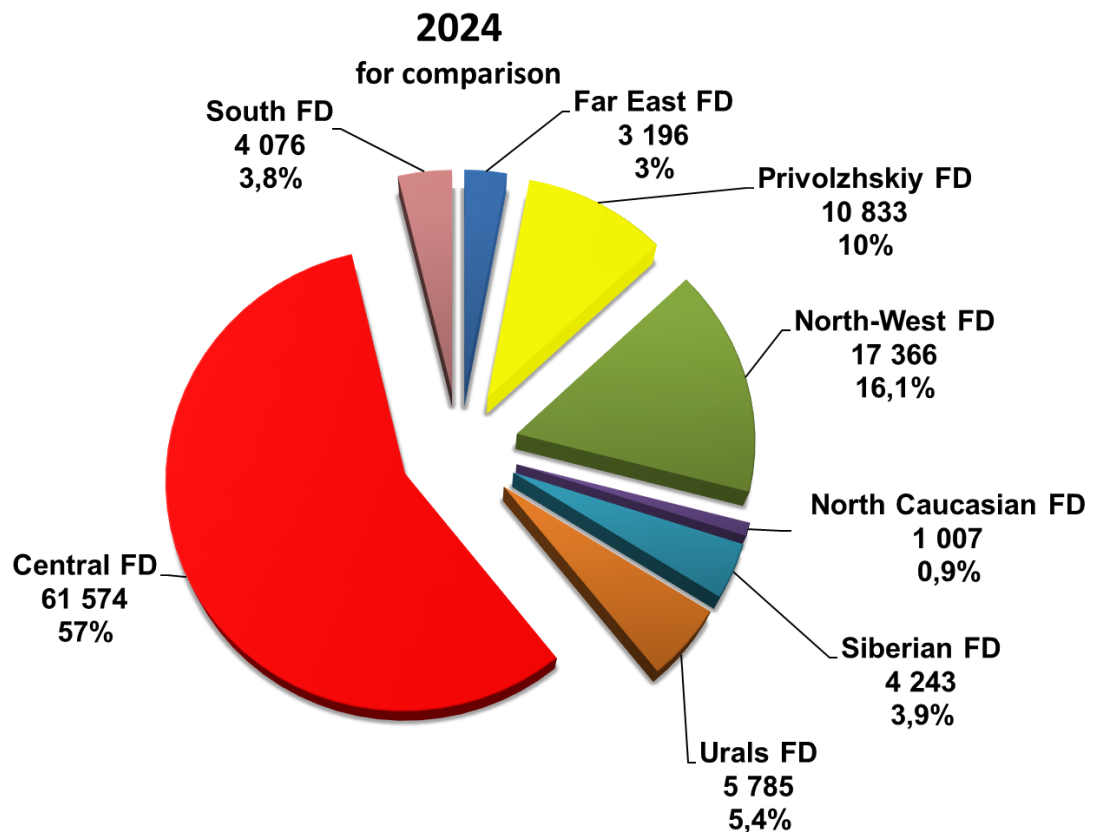
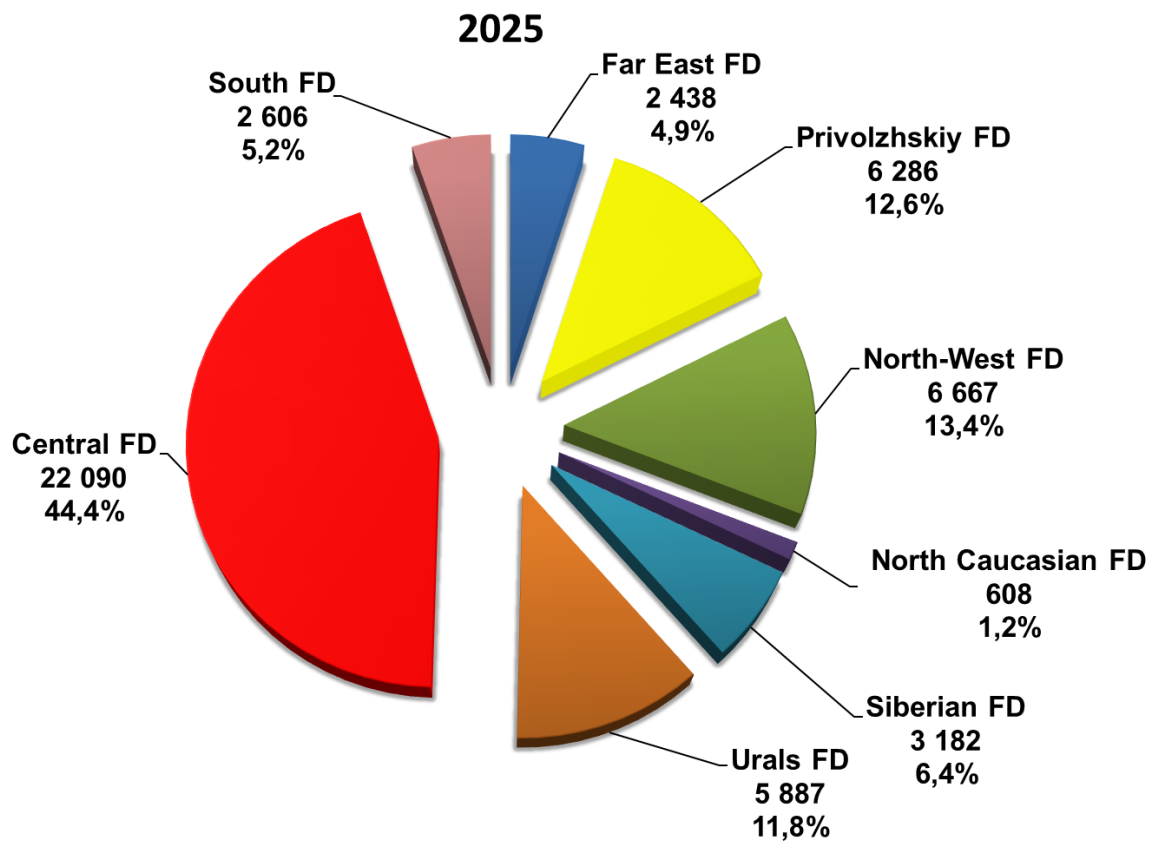
3 238 units **-34%**





TRUCKS

Structure of sales of new truck in Russia in 10 months 2025 by Federal District





BUSES

Sales of new buses in Russia in October and 10 months 2025 by brand

Brand	October 2025	October 2024	10 months 2025	10 months 2024	Change October 2025 vs 2024, %	Change 10 months 2025 vs 2024, %
PAZ	513	568	3 790	6 354	-9,7	-40,4
YUTONG	146	264	1 064	1 957	-44,7	-45,6
LIAZ	182	304	683	2 275	-40,1	-70,0
NEFAZ	118	106	556	1 422	11,3	-60,9
KAMAZ	73	75	409	530	-2,7	-22,8
KAVZ	45	81	381	513	-44,4	-25,7
HIGER	28	76	350	556	-63,2	-37,1
VOLGABUS	71	74	329	607	-4,1	-45,8
MAZ	96	27	288	362	255,6	-20,4
SIMAZ	54	15	118	199	260,0	-40,7
ZHONGTONG	18	47	102	274	-61,7	-62,8
GOLDEN DRAGON	5	23	93	176	-78,3	-47,2
URAL	13	3	62	105	333,3	-41,0
LOTOS	21	0	31	231		-86,6
BMZ	0	0	21	1		2 000,0
KING LONG (KLM)	0	18	19	110	-100,0	-82,7
SAZ	0	0	14	25		-44,0
FOTON	6	1	11	63	500,0	-82,5
ASIASTAR	1	0	9	2		350,0
NEMAN	0	1	9	12	-100,0	-25,0
SOLLERS	7	0	9	0		
AVIOR	1	0	6	0		
BZKT	0	0	4	1		300,0
ASIA	0	1	3	1	-100,0	200,0
MAN	0	0	2	0		
SINARA	0	0	2	0		
JAC	0	0	1	32		-96,9
UTTZ	0	0	1	0		
BKM	0	0	0	27		-100,0
JIANLING	0	0	0	1		-100,0
SHENLONG	0	0	0	1		-100,0
TOYOTA	0	0	0	1		-100,0
TOTAL	1 398	1 684	8 367	15 838	-17,0	-47,2
TOTAL Russian brands	1 097	1 226	6 396	12 238	-10,5	-47,7
TOTAL foreign brands	301	458	1 971	3 600	-34,3	-45,3



BUSES

Sales of new electric buses in Russia in October and 10 months 2025 by brand

Brand / electric buses	October 2025	October 2024	10 months 2025	10 months 2024	Change October 2025 vs 2024, %	Change 10 months 2025 vs 2024, %
KAMAZ	72	71	361	526	1,4	-31,4
LIAZ	10	75	37	272	-86,7	-86,4
BMZ	0	0	21	1		2000,0
SINARA	0	0	2	0		
VOLGABUS	0	0	1	22		-95,5
UTTZ	0	0	1	0		
NEFAZ	0	1	0	74	-100,0	-100,0
BKM	0	0	0	27		-100,0
TOTAL	82	147	423	922	-44,2	-54,1
TOTAL Russian brands	82	147	423	895	-44,2	-52,7
TOTAL foreign brands	0	0	0	27		-100,0



BUSES

Top 25 model ranking of new bus sales in October and 10 months 2025

Rank	Model	Brand	October 2025	October 2024	10 months 2025	10 months 2024	Change October 2025 vs 2024, %	Change 10 months 2025 vs 2024, %
1	VECTOR NEXT	PAZ	266	349	1 307	2 984	-23,8	-56,2
2	3205	PAZ	117	129	1 241	1 957	-9,3	-36,6
3	4234	PAZ	128	74	1 120	1 219	73,0	-8,1
4	6127	YUTONG	67	121	640	830	-44,6	-22,9
5	CITYMAX 12	LIAZ	182	265	530	1 610	-31,3	-67,1
6	5299, 5297 4X2	NEFAZ, KAMAZ	116	105	526	1 293	10,5	-59,3
7	4238	KAVZ	32	20	311	250	60,0	24,4
8	5222	KAMAZ	72	0	281	0		
9	203	MAZ	94	13	260	139	623,1	87,1
10	CITYRITM 12	VOLGABUS	57	25	203	121	128,0	67,8
11	6899	YUTONG	19	42	142	235	-54,8	-39,6
12	KLQ-SERIES	HIGER	9	9	137	73	0,0	87,7
13	KLQ 6129	HIGER	4	14	119	177	-71,4	-32,8
14	2258	SIMAZ	54	15	118	199	260,0	-40,7
15	LCK-SERIES	ZHONGTONG	18	47	102	274	-61,7	-62,8
16	6122	YUTONG	8	63	96	543	-87,3	-82,3
17	4292	LIAZ	0	25	91	225	-100,0	-59,6
18	3204	PAZ	1	13	85	31	-92,3	174,2
19	6128	YUTONG	44	3	83	78	1 366,7	6,4
20	6282	KAMAZ	0	71	80	526	-100,0	-84,8
21	XML	GOLDEN DRAGON	5	22	75	142	-77,3	-47,2
22	3255 4320 6X6	URAL	13	3	62	105	333,3	-41,0
23	4298	VOLGABUS	14	38	57	303	-63,2	-81,2
24	4235	KAVZ	5	47	55	155	-89,4	-64,5
25	KLQ 6119	HIGER	10	18	48	73	-44,4	-34,2

10 months 2025

PAZ VECTOR NEXT

1 307 units **-56,2%**

PAZ 3205

1 241 units **-36,6%**



PAZ 4234

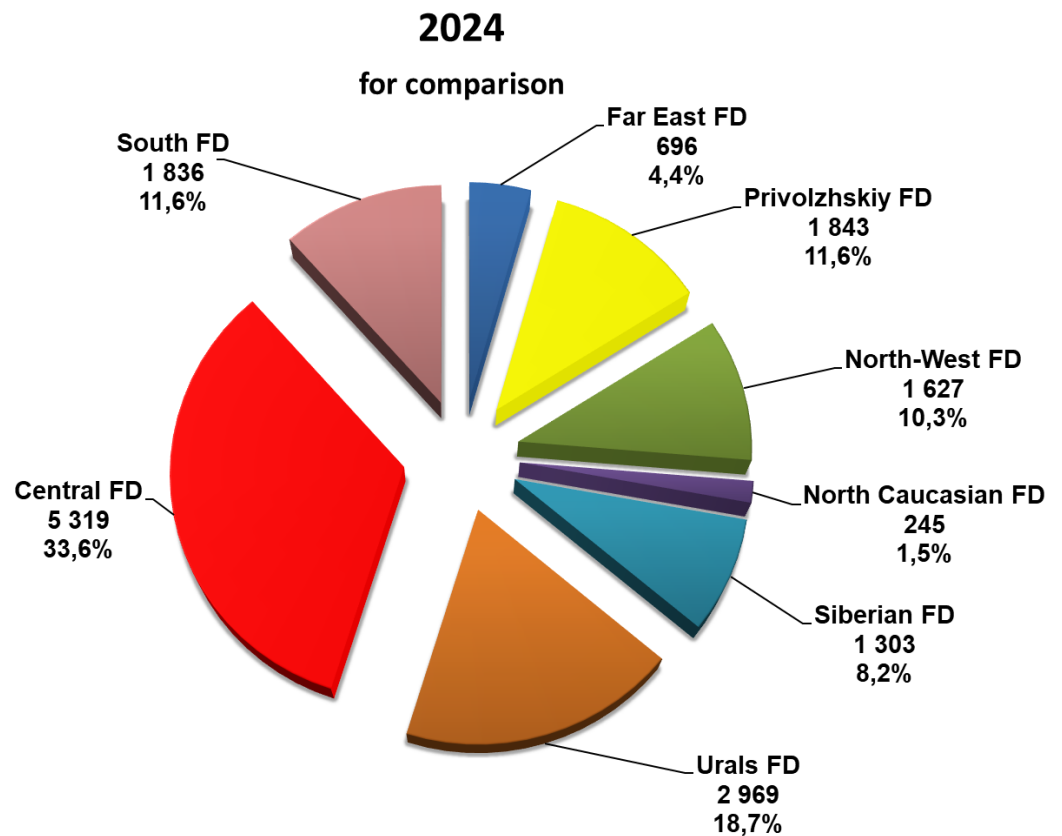
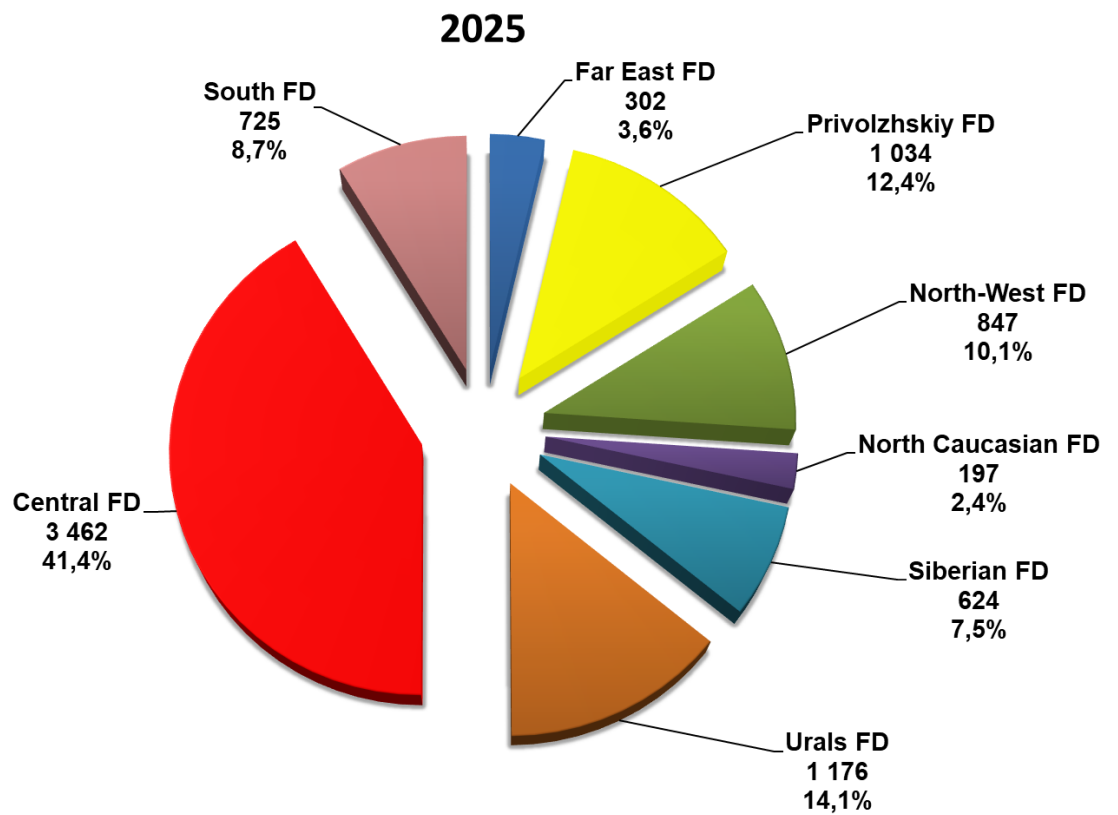
1 120 units **-8,1%**





BUSES

Structure of new bus sales in Russia in 10 months 2025 by Federal District



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