



12 DECEMBER 2025

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

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

- Trucks (except light trucks, N1 category) including special-purpose vehicles – 5 071 units in November 2025, down 46.0% YOY; 54 835 units in January-November 2025, down 53.3% YOY.
 - Buses and coaches (except minibuses, M2 category) – 1 968 units in November 2025, up 18.8% YOY; 10 335 units in January-November 2025, down 40.9% YOY.
- Among them – electric buses: 46 units in November 2025, down 46.5% YOY; 469 units in January-November 2025, down 53.5% 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 November 2025 by 46% year-over-year to 5 071 units. The year-to-date sales of new trucks fell by 53% to 54 835 vehicles (vs. 117 479 sales in eleven months of 2024).

Sales of domestically branded trucks in January-November 2025 showed a decline by 26.8% year-on-year to 23 162 units, while sales of foreign-branded trucks lost 63 percent (to 31 673 units). The share of foreign brands in January-November 2025 was kept at 58% of the new truck market.

KAMAZ was the best-selling brand in January-November 2025 (15 893 sales, down 24%). SITRAK was the second best-selling brand with 6 828 trucks sold (down 63%). The third position is taken by SHAANXI (4 297 sales, down 71%), while GAZ brand (4 193 sales) continues to keep the fourth position. The share of KAMAZ brand is maintained at 29% of the market, the best-selling model being KAMAZ 43118 (6X6), with 3 749 trucks sold (down 6%).

In November 2025, the bus sales (1 968 vehicles) grew by 41% over the result of October 2025 and by 19% vs. November 2024. The total bus sales in January-November 2025 were 10 335 vehicles, down 41% YOY. Sales of domestic brands in January-November 2025 fell by 40% to 8 153 buses, while sales of foreign brands lost 44% to show 2 182 buses. The share of domestic brands in the first eleven months of 2025 was 79% of the new bus market. Sales of electric buses in January-November 2025 fell by 54% to 469 vehicles.

The best-selling bus brand in eleven months of 2025 is again PAZ with 4 895 vehicles sold (down 32%), gaining a 47% market share. The best-selling bus model is PAZ VECTOR NEXT (2 068 units sold, down 39%).

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TRUCKS

Sales of new trucks in Russia in November and 11 months 2025 by brand, inclusive of special-purpose vehicles

Brand	November 2025	November 2024	11 months 2025	11 months 2024	Change November 2025 vs 2024, %	Change 11 months 2025 vs 2024, %
KAMAZ	1 576	2 130	15 893	20 872	-26,0	-23,9
SITRAK	719	1 064	6 828	18 488	-32,4	-63,1
SHAANXI	299	954	4 297	14 811	-68,7	-71,0
GAZ	311	622	4 193	6 778	-50,0	-38,1
FAW	464	946	3 972	10 934	-51,0	-63,7
MAZ	264	460	2 859	5 140	-42,6	-44,4
URAL	174	303	2 050	3 028	-42,6	-32,3
ISUZU	142	244	2 026	1 940	-41,8	4,4
HOWO	135	343	2 021	5 639	-60,6	-64,2
DONGFENG	70	703	1 850	9 491	-90,0	-80,5
JAC	183	424	1 748	4 127	-56,8	-57,6
FOTON	134	277	1 569	4 020	-51,6	-61,0
SANY	159	117	1 260	2 388	35,9	-47,2
VALDAI	108	147	668	574	-26,5	16,4
ZOOMLION	27	56	527	1 008	-51,8	-47,7
XU GONG	39	49	445	658	-20,4	-32,4
VOLVO	44	100	353	999	-56,0	-64,7
MERCEDES	32	108	311	2 255	-70,4	-86,2
AMT	17	26	309	323	-34,6	-4,3
MAZ MAN	19	10	237	63	90,0	276,2
SCANIA	8	23	169	390	-65,2	-56,7
CHENGLONG	28	3	144	47	833,3	206,4
HYUNDAI	39	11	126	154	254,5	-18,2
LIUGONG	3	11	126	80	-72,7	57,5
JMC	16	27	125	170	-40,7	-26,5
HONGYAN	14	44	119	784	-68,2	-84,8
MAN	7	38	86	475	-81,6	-81,9
DAEWOO	6	13	83	313	-53,8	-73,5
SHANQI	2	8	72	16	-75,0	350,0
DAYUN	3	15	61	215	-80,0	-71,6
DAF	11	31	56	381	-64,5	-85,3
BEIBEN	9	28	45	179	-67,9	-74,9
FUSO	0	2	39	53	-100,0	-26,4
AMUR	0	4	26	6	-100,0	333,3
CAMC	0	36	23	50	-100,0	-54,0
HINO	1	11	23	197	-90,9	-88,3
FORD	0	0	15	50		-70,0
BEIFANG BENCHI	0	2	14	96	-100,0	-85,4
NEMO	1	0	11	0		
IVECO	2	0	8	15		-46,7
RENAULT	2	2	7	31	0,0	-77,4
NEFAZ	0	0	6	11		-45,5
SOLLERS	0	0	5	0		
AMBERTRUCK	0	0	4	0		
ZIL	0	0	4	58		-93,1



TRUCKS

Brand	November 2025	November 2024	11 months 2025	11 months 2024	Change November 2025 vs 2024, %	Change 11 months 2025 vs 2024, %
LOTOS	1	0	3	0		
MZKT	0	3	3	23	-100,0	-87,0
SDAC	0	0	3	24		-87,5
BAW	0	0	2	7		-71,4
CHENGLIWEI	1	0	2	17		-88,2
LIEBHERR	0	0	2	0		
BZKT	1	0	1	0		
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	0	0	1		-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	1	0	12	-100,0	-100,0
TATRA	0	2	0	6	-100,0	-100,0
YUEJIN	0	1	0	1	-100,0	-100,0
TOTAL	5 071	9 399	54 835	117 479	-46,0	-53,3
TOTAL Russian brands	2 188	3 232	23 162	31 651	-32,3	-26,8
TOTAL foreign brands	2 883	6 167	31 673	85 828	-53,3	-63,1

Sales of new trucks in Russia in November and 11 months 2025 by type

Type	November 2025	November 2024	11 months 2025	11 months 2024	Market share November 2025, %	Market share November 2024, %	Market share 11 months 2025, %	Market share 11 months 2024, %
Other special equipment	2 403	3 904	28 282	42 948	47,4	41,5	51,6	36,6
Truck-tractor	834	2 154	8 574	30 714	16,5	22,9	15,6	26,1
Other truck types	440	1 211	5 086	15 438	8,7	12,9	9,3	13,1
Dump truck	362	804	3 736	8 522	7,1	8,6	6,8	7,3
Drop-side flat bed	389	549	3 650	9 561	7,7	5,8	6,7	8,1
Refrigerator	367	297	2 395	3 290	7,2	3,2	4,4	2,8
Van	152	332	1 486	4 169	3,0	3,5	2,7	3,6
Autocrane	60	78	819	1 601	1,2	0,8	1,5	1,4
Tanker	46	59	537	912	0,9	0,6	1,0	0,8
Mobile repair shop	8	5	165	162	0,2	0,1	0,3	0,1
Refueler	9	6	98	150	0,2	0,1	0,2	0,1
Other	1	0	7	12	0,0	0,0	0,0	0,0
TOTAL	5071	9399	54835	117479	100,0	100,0	100,0	100,0



TRUCKS

Top 25 model ranking of new truck sales in Russia in November and 11 months 2025

Rank	Model	Brand	November 2025	November 2024	11 months 2025	11 months 2024	Change November 2025 vs 2024, %	Change 11 months 2025 vs 2024, %
1	43118 6X6	KAMAZ	341	354	3 749	3 992	-3,7	-6,1
2	GAZON NEXT	GAZ	282	507	3 520	5 411	-44,4	-34,9
3	C7H 6X4	SITRAK	462	349	3 452	4 655	32,4	-25,8
4	C7H 4X2	SITRAK	209	536	2 685	12 003	-61,0	-77,6
5	65115 6X4	KAMAZ	273	344	2 665	3 158	-20,6	-15,6
6	J6 6X4	FAW	388	403	2 564	4 628	-3,7	-44,6
7	5490 4X2	KAMAZ	216	447	2 089	4 038	-51,7	-48,3
8	SX 331 8X4	SHAANXI	92	351	1 638	5 083	-73,8	-67,8
9	ELF	ISUZU	103	178	1 531	1 496	-42,1	2,3
10	4320 6X6	URAL	119	217	1 437	2 101	-45,2	-31,6
11	6520 6X4	KAMAZ	87	126	1 167	1 069	-31,0	9,2
12	SX 418 4X2	SHAANXI	104	145	1 163	2 547	-28,3	-54,3
13	53605 4X2	KAMAZ	152	43	954	658	253,5	45,0
14	43253 4X2	KAMAZ	87	103	839	810	-15,5	3,6
15	KOMPAS 9 4X2	KAMAZ	48	16	829	730	200,0	13,6
16	T5G 4X2	HOWO	27	27	828	1 228	0,0	-32,6
17	SX 425 6X4	SHAANXI	56	169	786	2 503	-66,9	-68,6
18	DFH-SERIES	DONGFENG	1	467	780	6 690	-99,8	-88,3
19	6312 6X4	MAZ	67	101	703	1 302	-33,7	-46,0
20	C7H 8X4	SITRAK	48	177	691	1 807	-72,9	-61,8
21	N120	JAC	121	265	686	1 144	-54,3	-40,0
22	5340 4X2	MAZ	38	92	683	1 112	-58,7	-38,6
23	T5G 6X4	HOWO	62	104	668	1 663	-40,4	-59,8
24	J6 6X6	FAW	23	55	549	415	-58,2	32,3
25	OLLIN	FOTON	37	58	540	1 108	-36,2	-51,3

11 months 2025

KAMAZ 43118 6X6

3 749 units **-6,1%**

SITRAK C7H 6X4

3 452 units **-25,8%**

GAZ GAZON NEXT

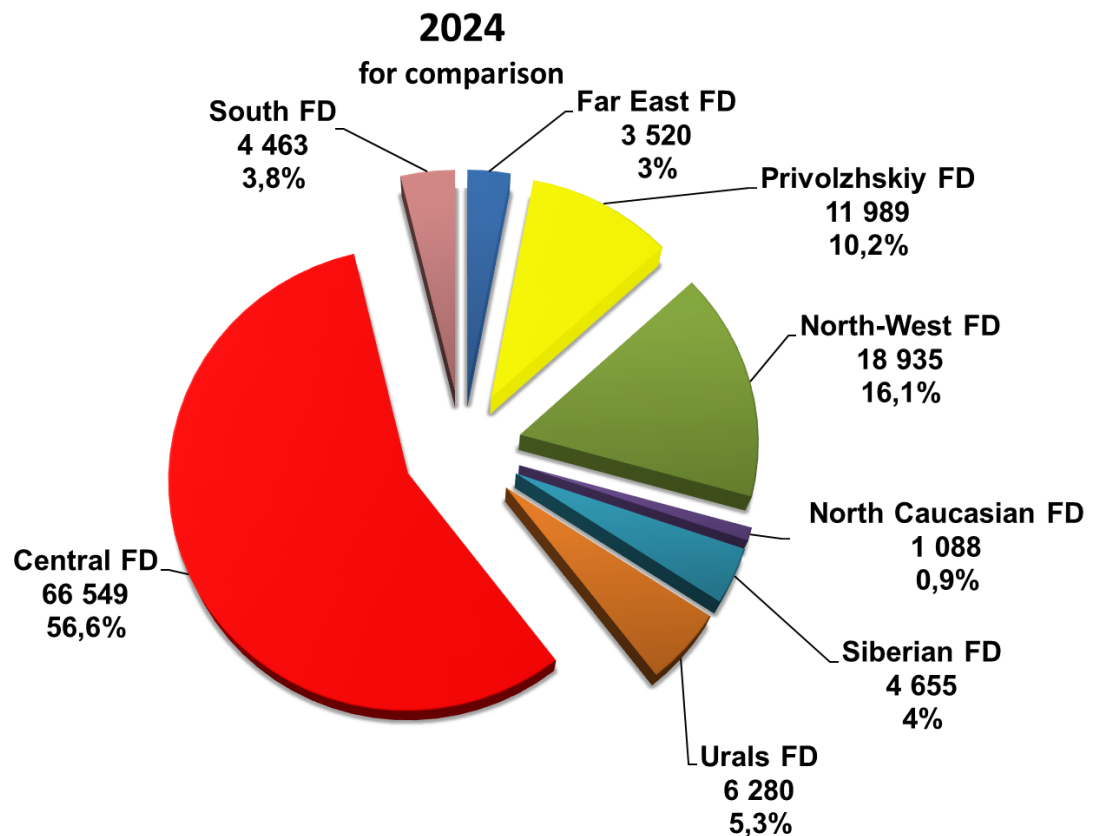
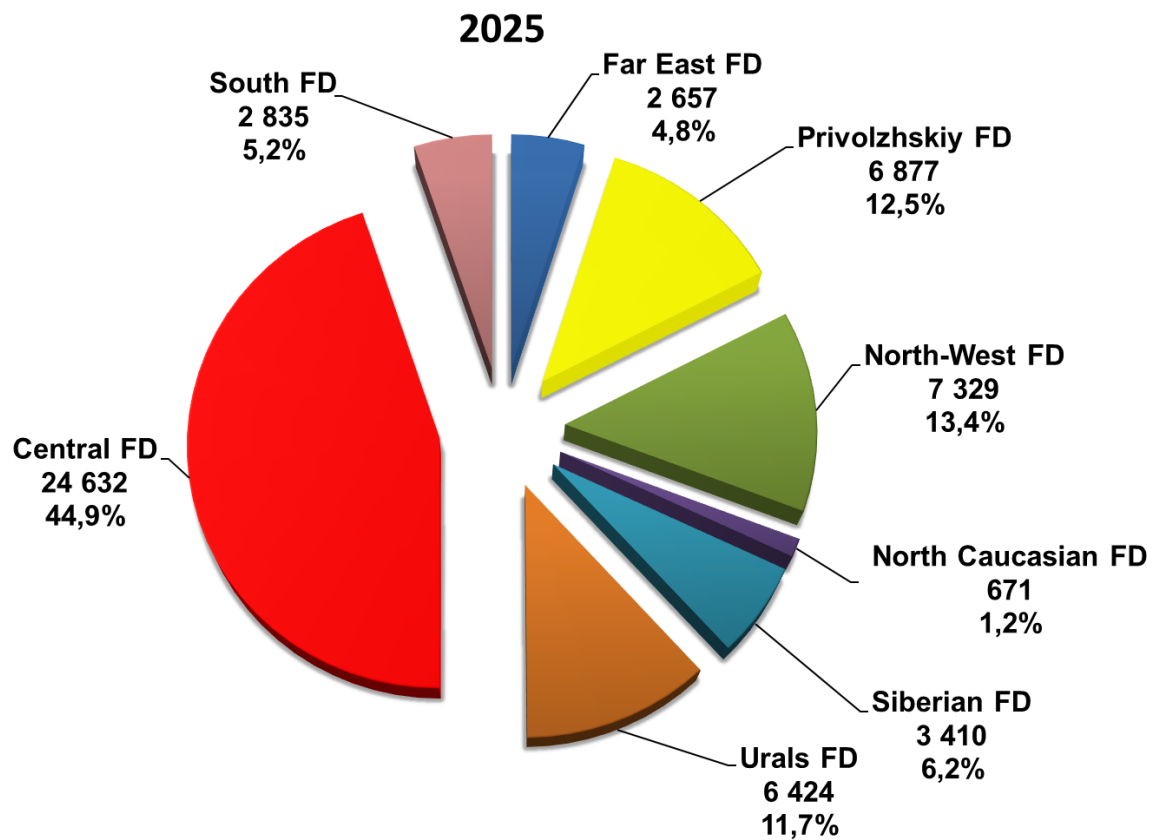
3 520 units **-34,9%**





TRUCKS

Structure of sales of new truck in Russia in 11 months 2025 by Federal District





BUSES

Sales of new buses in Russia in November and 11 months 2025 by brand

Brand	November 2025	November 2024	11 months 2025	11 months 2024	Change November 2025 vs 2024, %	Change 11 months 2025 vs 2024, %
PAZ	1 105	836	4 895	7 190	32,2	-31,9
YUTONG	94	148	1 158	2 105	-36,5	-45,0
LIAZ	211	220	894	2 495	-4,1	-64,2
NEFAZ	129	126	685	1 548	2,4	-55,7
KAMAZ	57	56	466	586	1,8	-20,5
VOLGABUS	137	81	466	688	69,1	-32,3
KAVZ	55	62	436	575	-11,3	-24,2
HIGER	32	56	382	612	-42,9	-37,6
MAZ	53	31	341	393	71,0	-13,2
SIMAZ	32	4	150	203	700,0	-26,1
ZHONGTONG	18	21	120	295	-14,3	-59,3
GOLDEN DRAGON	8	6	101	182	33,3	-44,5
URAL	6	0	68	105		-35,2
LOTOS	12	0	43	231		-81,4
SOLLERS	13	0	22	0		
BMZ	0	2	21	3	-100,0	600,0
KING LONG (KLM)	0	5	19	115	-100,0	-83,5
SAZ	0	0	14	25		-44,0
ASIASTAR	4	0	13	2		550,0
FOTON	0	0	11	63		-82,5
NEMAN	0	1	9	13	-100,0	-30,8
AVIOR	2	0	8	0		
BZKT	0	0	4	1		300,0
ASIA	0	0	3	1		200,0
MAN	0	0	2	0		
SINARA	0	0	2	0		
JAC	0	0	1	32		-96,9
UTTZ	0	0	1	0		
ANKAI	0	1	0	1	-100,0	-100,0
BKM	0	0	0	27		-100,0
JIANLING	0	0	0	1		-100,0
SHENLONG	0	0	0	1		-100,0
TOYOTA	0	1	0	2	-100,0	-100,0
TOTAL	1 968	1 657	10 335	17 495	18,8	-40,9
TOTAL Russian brands	1 757	1 387	8 153	13 625	26,7	-40,2
TOTAL foreign brands	211	270	2 182	3 870	-21,9	-43,6



BUSES

Sales of new electric buses in Russia in November and 11 months 2025 by brand

Brand / electric buses	November 2025	November 2024	11 months 2025	11 months 2024	Change November 2025 vs 2024, %	Change 11 months 2025 vs 2024, %
KAMAZ	46	47	407	573	-2,1	-29,0
LIAZ	0	36	37	308	-100,0	-88,0
BMZ	0	2	21	3	-100,0	600,0
SINARA	0	0	2	0		
VOLGABUS	0	0	1	22		-95,5
UTTZ	0	0	1	0		
NEFAZ	0	0	0	74		-100,0
KING LONG (KLM)	0	1	0	1	-100,0	-100,0
BKM	0	0	0	27		-100,0
TOTAL	46	86	469	1 008	-46,5	-53,5
TOTAL Russian brands	46	85	469	980	-45,9	-52,1
TOTAL foreign brands	0	1	0	28	-100,0	-100,0



BUSES

Top 25 model ranking of new bus sales in November and 11 months 2025

Rank	Model	Brand	November 2025	November 2024	11 months 2025	11 months 2024	Change November 2025 vs 2024, %	Change 11 months 2025 vs 2024, %
1	VECTOR NEXT	PAZ	761	429	2 068	3 413	77,4	-39,4
2	3205	PAZ	183	215	1 424	2 172	-14,9	-34,4
3	4234	PAZ	153	176	1 273	1 395	-13,1	-8,7
4	CITYMAX 12	LIAZ	192	189	722	1 799	1,6	-59,9
5	6127	YUTONG	63	70	703	900	-10,0	-21,9
6	5299, 5297 4X2	NEFAZ, KAMAZ	125	124	651	1 417	0,8	-54,1
7	4238	KAVZ	29	52	340	302	-44,2	12,6
8	5222	KAMAZ	46	0	327	0		
9	CITYRITM 12	VOLGABUS	105	10	308	131	950,0	135,1
10	203	MAZ	33	16	293	155	106,2	89,0
11	KLQ-SERIES	HIGER	18	7	155	80	157,1	93,8
12	6899	YUTONG	10	36	152	271	-72,2	-43,9
13	2258	SIMAZ	32	4	150	203	700,0	-26,1
14	KLQ 6129	HIGER	2	12	121	189	-83,3	-36,0
15	LCK-SERIES	ZHONGTONG	18	21	120	295	-14,3	-59,3
16	6122	YUTONG	13	26	109	569	-50,0	-80,8
17	4292	LIAZ	0	25	91	250	-100,0	-63,6
18	6128	YUTONG	7	1	90	79	600,0	13,9
19	3204	PAZ	4	9	89	40	-55,6	122,5
20	4298	VOLGABUS	31	14	88	317	121,4	-72,2
21	XML	GOLDEN DRAGON	7	6	82	148	16,7	-44,6
22	6282	KAMAZ	0	47	80	573	-100,0	-86,0
23	3255 4320 6X6	URAL	6	0	68	105		-35,2
24	6213	LIAZ	19	0	65	0		
25	VECTOR NEXT	PAZ	761	429	2 068	3 413	77,4	-39,4

11 months 2025

PAZ VECTOR NEXT
2 068 units **-39,4%**

PAZ 3205
1 424 units **-34,4%**



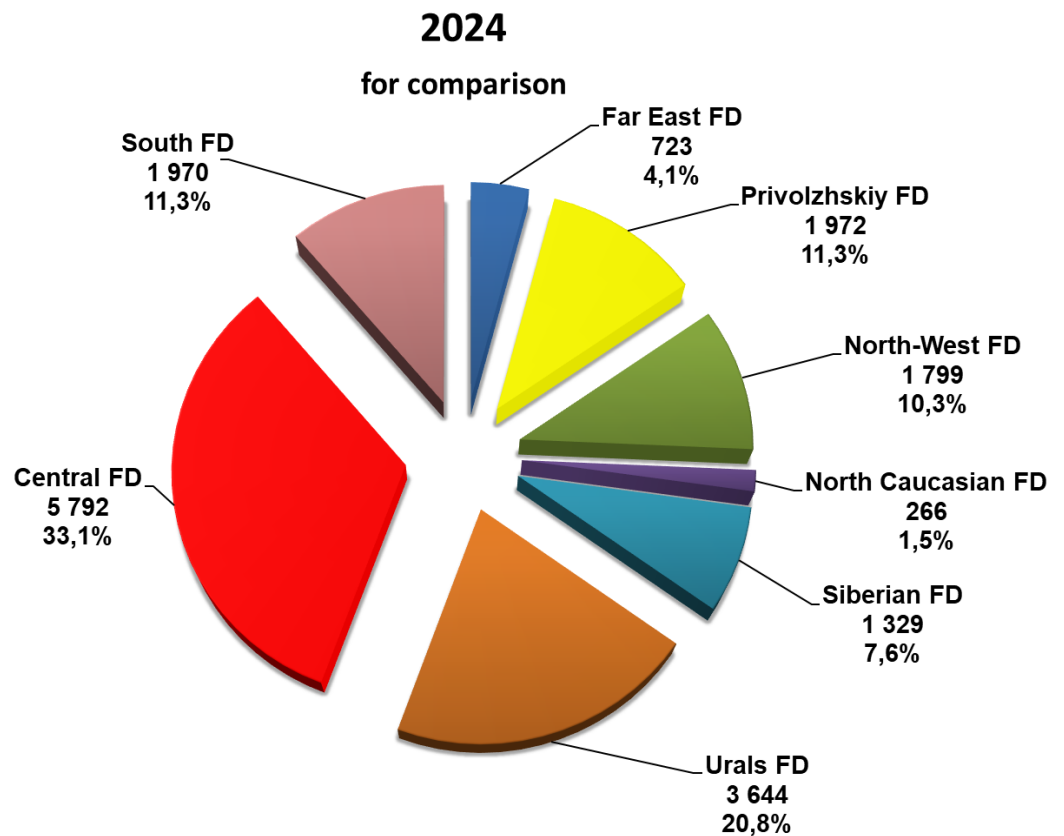
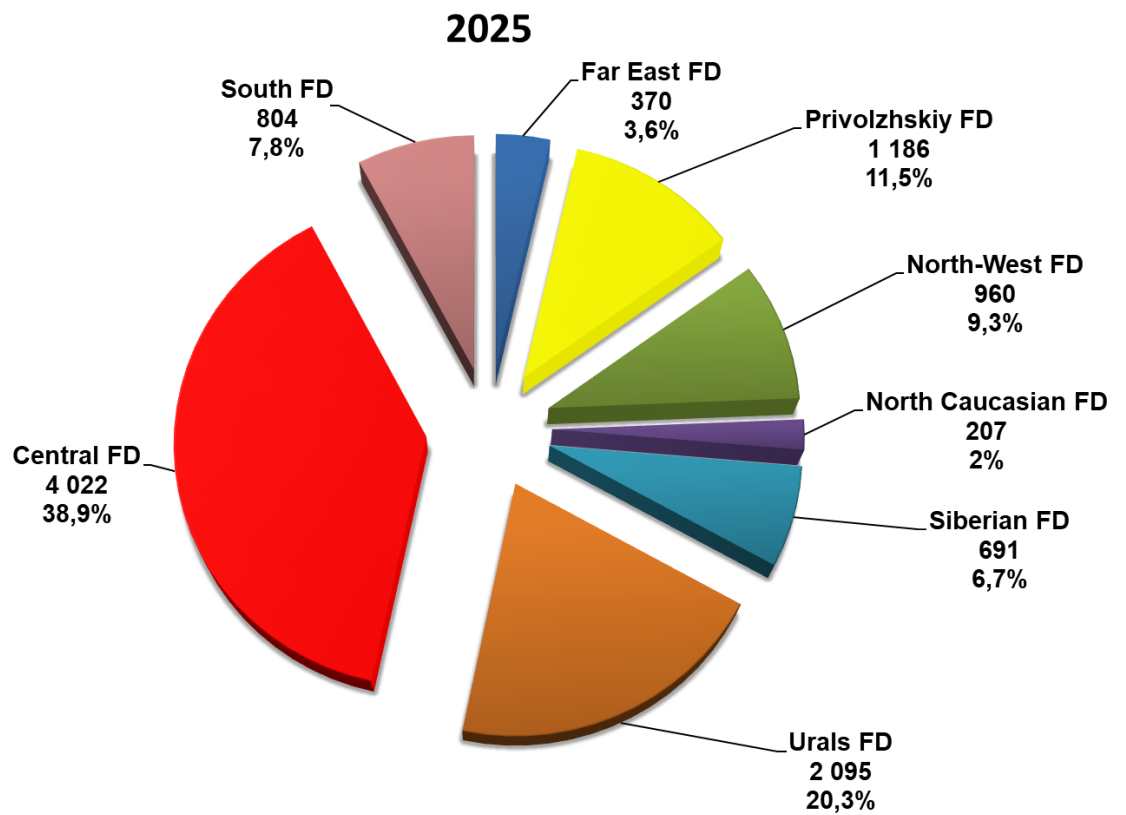
PAZ 4234
1 273 units **-8,7%**





BUSES

Structure of new bus sales in Russia in 11 months 2025 by Federal District



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