



12 JANUARY 2026

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

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

- Trucks (except light trucks, N1 category) including special-purpose vehicles – 6 721 units in December 2025, down 22.6% YOY; 61 556 units in January-December 2025, down 51.2% YOY.
  - Buses and coaches (except minibuses, M2 category) – 2 501 units in December 2025, up 13.2% YOY; 12 836 units in January-December 2025, down 34.9% YOY.
- Among them – electric buses: 58 units in December 2025, down 9.4% YOY; 527 units in January-December 2025, down 50.8% 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 December 2025 by 23% year-over-year to 6 721 units. The year-to-date sales of new trucks fell by 51% to 61 556 vehicles (vs. 126 165 sales in 2024).

Sales of domestically branded trucks in January-December 2025 showed a decline by 24% year-on-year to 26 585 units, while sales of foreign-branded trucks lost 62 percent (to 34 971 units). The share of foreign brands in 2025 was 57% of the new truck market.

KAMAZ was the best-selling brand in January-December 2025 (18 333 sales, down 21%). SITRAK was the second best-selling brand with 7 609 trucks sold (down 61%). The third position is taken by GAZ brand (4 698 sales, down 38%). The share of KAMAZ brand is maintained at 30% of the market, the best-selling model being KAMAZ 43118 (6X6), with 4 336 trucks sold (down 2%).

In December 2025, the bus sales (2 501 vehicles) grew by 13% over the result of December 2024 and by 27% vs. November 2025. The total bus sales in January-December 2025 were 12 836 vehicles, down 35% YOY. Sales of domestic brands in January-December 2025 fell by 33% to 10 265 buses, while sales of foreign brands lost 40% to show 2 571 buses. The share of domestic brands in 2025 was 80% of the new bus market. Sales of electric buses in January-December 2025 fell by 51% to 527 vehicles.

The best-selling bus brand is PAZ with 6 006 vehicles sold in January-December 2025 (down 26% YOY), gaining a 47% market share. The best-selling bus model is PAZ VECTOR NEXT (2 765 units sold, down 28%).

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# TRUCKS

## Sales of new trucks in Russia in December and 12 months 2025 by brand, inclusive of special-purpose vehicles

Brand	December 2025	December 2024	12 months 2025	12 months 2024	Change December 2025 vs 2024, %	Change 12 months 2025 vs 2024, %
KAMAZ	2 440	2 249	18 333	23 121	8,5	-20,7
SITRAK	781	888	7 609	19 376	-12,0	-60,7
GAZ	505	765	4 698	7 543	-34,0	-37,7
SHAANXI	370	734	4 667	15 545	-49,6	-70,0
FAW	480	746	4 452	11 680	-35,7	-61,9
MAZ	415	579	3 274	5 719	-28,3	-42,8
URAL	272	258	2 322	3 286	5,4	-29,3
ISUZU	193	272	2 219	2 212	-29,0	0,3
HOWO	173	265	2 194	5 904	-34,7	-62,8
JAC	229	382	1 977	4 509	-40,1	-56,2
DONGFENG	120	499	1 970	9 990	-76,0	-80,3
FOTON	165	259	1 734	4 279	-36,3	-59,5
SANY	132	103	1 392	2 491	28,2	-44,1
VALDAI	157	133	825	707	18,0	16,7
ZOOMLION	20	50	547	1 058	-60,0	-48,3
XU GONG	32	34	477	692	-5,9	-31,1
VOLVO	32	64	385	1 063	-50,0	-63,8
AMT	35	45	344	368	-22,2	-6,5
MERCEDES	19	44	330	2 299	-56,8	-85,6
MAZ MAN	16	13	253	76	23,1	232,9
SCANIA	8	18	177	408	-55,6	-56,6
CHENGLONG	24	6	168	53	300,0	217,0
HYUNDAI	13	11	139	165	18,2	-15,8
JMC	8	33	133	203	-75,8	-34,5
HONGYAN	11	65	130	849	-83,1	-84,7
LIUGONG	0	15	126	95	-100,0	32,6
MAN	20	34	106	509	-41,2	-79,2
DAEWOO	6	18	89	331	-66,7	-73,1
SHANQI	0	12	72	28	-100,0	157,1
DAYUN	7	6	68	221	16,7	-69,2
DAF	11	31	67	412	-64,5	-83,7
BEIBEN	3	5	48	184	-40,0	-73,9
FUSO	1	2	40	55	-50,0	-27,3
AMUR	2	9	28	15	-77,8	86,7
HINO	4	11	27	208	-63,6	-87,0
CAMC	0	18	23	68	-100,0	-66,2
BEIFANG BENCHI	5	5	19	101	0,0	-81,2
FORD	0	2	15	52	-100,0	-71,2
NEMO	0	0	11	0		
AMBERTRUCK	6	0	10	0		
IVECO	0	1	8	16	-100,0	-50,0
RENAULT	0	0	7	31		-77,4
LOTOS	3	0	6	0		
NEFAZ	0	0	6	11		-45,5
SOLLERS	1	0	6	0		
ZIL	0	1	4	59	-100,0	-93,2



# TRUCKS

Brand	Decemder 2025	Decemder 2024	12 months 2025	12 months 2024	Change Decemder 2025 vs 2024, %	Change 12 months 2025 vs 2024, %
MZKT	0	0	3	23		-87,0
SDAC	0	1	3	25	-100,0	-88,0
BAW	0	0	2	7		-71,4
BZKT	1	0	2	0		
CHENGLIWEI	0	0	2	17		-88,2
LIEBHERR	0	0	2	0		
DS DESA	0	0	1	0		
GREEN	0	0	1	0		
KAMA	1	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	0	0	12		-100,0
TATRA	0	0	0	6		-100,0
YUEJIN	0	0	0	1		-100,0
<b>TOTAL</b>	<b>6 721</b>	<b>8 686</b>	<b>61 556</b>	<b>126 165</b>	<b>-22,6</b>	<b>-51,2</b>
<b>TOTAL Russian brands</b>	<b>3 423</b>	<b>3 460</b>	<b>26 585</b>	<b>35 111</b>	<b>-1,1</b>	<b>-24,3</b>
<b>TOTAL foreign brands</b>	<b>3 298</b>	<b>5 226</b>	<b>34 971</b>	<b>91 054</b>	<b>-36,9</b>	<b>-61,6</b>

## Sales of new trucks in Russia in December and 12 months 2025 by type

Type	Decemder 2025	Decemder 2024	12 months 2025	12 months 2024	Market share Decemder 2025, %	Market share Decemder 2024, %	Market share 12 months 2025, %	Market share 12 months 2024, %
Other special equipment	3 774	4 044	32 056	46 992	56,2	46,6	52,1	37,3
Truck-tractor	1 018	1 774	9 592	32 488	15,2	20,4	15,6	25,8
Other truck types	514	929	5 600	16 367	7,7	10,7	9,1	13,0
Dump truck	431	722	4 167	9 244	6,4	8,3	6,8	7,3
Drop-side flat bed	455	503	4 105	10 064	6,8	5,8	6,7	8,0
Refrigerator	223	279	2 618	3 569	3,3	3,2	4,3	2,8
Van	133	240	1 619	4 409	2,0	2,8	2,6	3,5
Autocrane	69	95	888	1 696	1,0	1,1	1,4	1,3
Tanker	69	61	606	973	1,0	0,7	1,0	0,8
Mobile repair shop	23	31	188	193	0,3	0,4	0,3	0,2
Refueler	10	8	108	158	0,2	0,1	0,2	0,1
Other	2	0	9	12	0,0	0,0	0,0	0,0
<b>TOTAL</b>	<b>6 721</b>	<b>8 686</b>	<b>61 556</b>	<b>126 165</b>	<b>100,0</b>	<b>100,0</b>	<b>100,0</b>	<b>100,0</b>



# TRUCKS

## Top 25 model ranking of new truck sales in Russia in December and 12 months 2025

Rank	Model	Brand	December 2025	December 2024	12 months 2025	12 months 2024	Change December 2025 vs 2024, %	Change 12 months 2025 vs 2024, %
1	43118 6X6	KAMAZ	587	436	4 336	4 428	34,6	-2,1
2	GAZON NEXT	GAZ	455	609	3 975	6 020	-25,3	-34,0
3	C7H 6X4	SITRAK	417	365	3 869	5 020	14,2	-22,9
4	65115 6X4	KAMAZ	484	351	3 149	3 509	37,9	-10,3
5	C7H 4X2	SITRAK	289	381	2 974	12 384	-24,1	-76,0
6	J6 6X4	FAW	395	320	2 959	4 948	23,4	-40,2
7	5490 4X2	KAMAZ	335	384	2 424	4 422	-12,8	-45,2
8	SX 331 8X4	SHAANXI	158	255	1 796	5 338	-38,0	-66,4
9	ELF	ISUZU	143	218	1 674	1 714	-34,4	-2,3
10	4320 6X6	URAL	172	189	1 609	2 290	-9,0	-29,7
11	6520 6X4	KAMAZ	140	213	1 307	1 282	-34,3	2,0
12	SX 418 4X2	SHAANXI	116	94	1 279	2 641	23,4	-51,6
13	53605 4X2	KAMAZ	207	78	1 161	736	165,4	57,7
14	43253 4X2	KAMAZ	127	121	966	931	5,0	3,8
15	KOMPAS 9 4X2	KAMAZ	103	19	932	749	442,1	24,4
16	T5G 4X2	HOWO	56	132	884	1 360	-57,6	-35,0
17	SX 425 6X4	SHAANXI	73	145	859	2 648	-49,7	-67,6
18	5340 4X2	MAZ	143	141	826	1 253	1,4	-34,1
19	6312 6X4	MAZ	118	158	821	1 460	-25,3	-43,8
20	N120	JAC	120	204	806	1 348	-41,2	-40,2
21	DFH-SERIES	DONGFENG	6	343	786	7 033	-98,3	-88,8
22	C7H 8X4	SITRAK	75	142	766	1 949	-47,2	-60,7
23	T5G 6X4	HOWO	70	100	738	1 763	-30,0	-58,1
24	OLLIN	FOTON	65	65	605	1 173	0,0	-48,4
25	6580 6X4	KAMAZ	71	34	571	270	108,8	111,5

### 12 months 2025

KAMAZ 43118 6X6

4 336 units **-2,1%**

SITRAK C7H 6X4

3 869 units **-22,9%**

GAZ GAZON NEXT

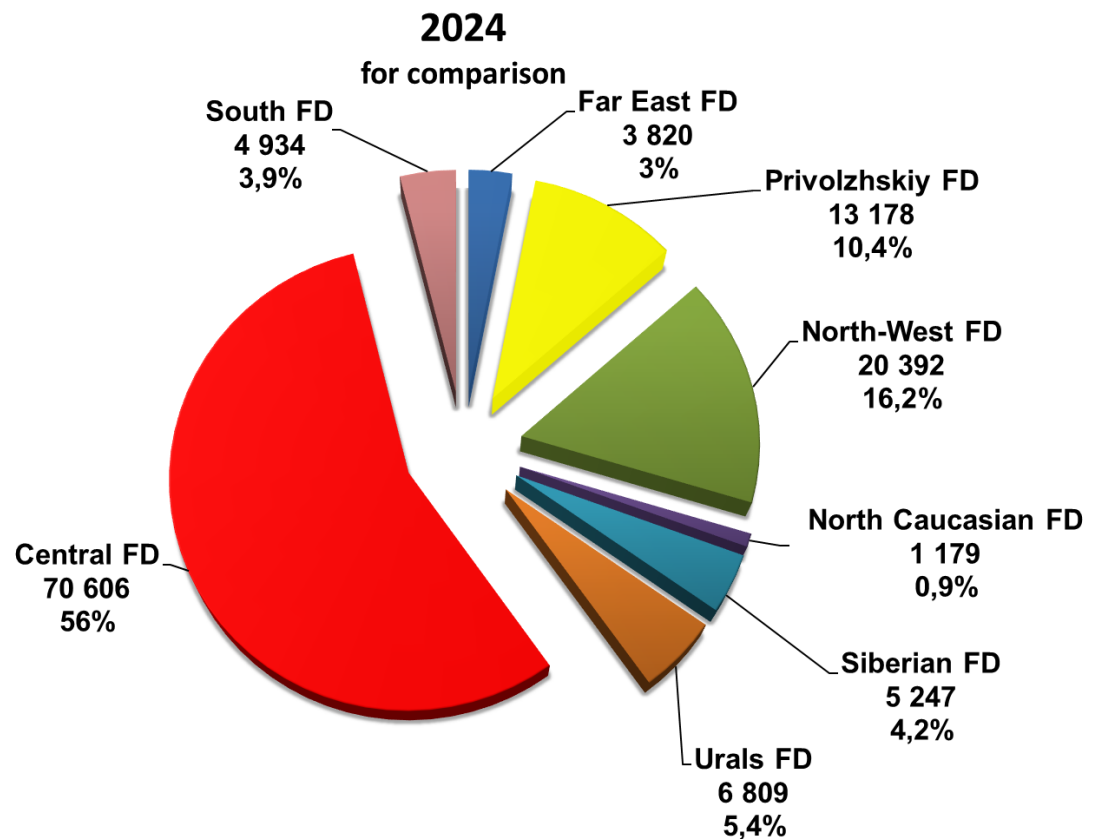
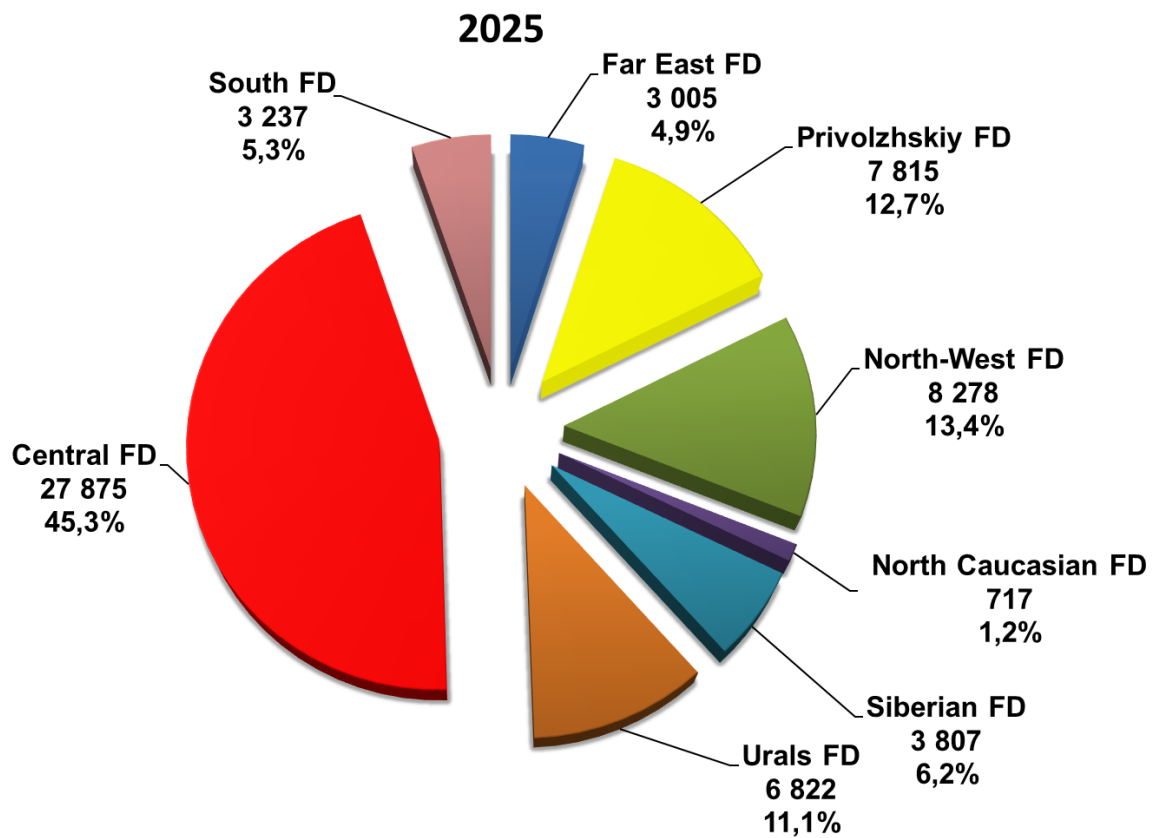
3 975 units **-34%**





# TRUCKS

## Structure of sales of new truck in Russia in 12 months 2025 by Federal District





# BUSES

## Sales of new buses in Russia in December and 12 months 2025 by brand

Brand	December 2025	December 2024	12 months 2025	12 months 2024	Change December 2025 vs 2024, %	Change 12 months 2025 vs 2024, %
PAZ	1 111	924	6 006	8 114	20,2	-26,0
YUTONG	144	110	1 302	2 215	30,9	-41,2
LIAZ	185	394	1 079	2 889	-53,0	-62,7
NEFAZ	309	119	994	1 667	159,7	-40,4
VOLGABUS	153	93	619	781	64,5	-20,7
KAMAZ	99	64	565	650	54,7	-13,1
KAVZ	109	98	545	673	11,2	-19,0
MAZ	158	111	499	504	42,3	-1,0
HIGER	65	79	447	691	-17,7	-35,3
SIMAZ	33	36	183	239	-8,3	-23,4
LOTOS	99	38	142	269	160,5	-47,2
ZHONGTONG	9	17	129	312	-47,1	-58,7
GOLDEN DRAGON	9	5	110	187	80,0	-41,2
URAL	5	1	73	106	400,0	-31,1
SOLLERS	9	0	31	0		
BMZ	0	9	21	12	-100,0	75,0
KING LONG (KLM)	0	3	19	118	-100,0	-83,9
SAZ	0	0	14	25		-44,0
ASIASTAR	0	0	13	2		550,0
FOTON	2	106	13	169	-98,1	-92,3
NEMAN	1	0	10	13		-23,1
AVIOR	0	0	8	0		
BZKT	0	0	4	1		300,0
ASIA	0	1	3	2	-100,0	50,0
JAC	1	0	2	32		-93,8
MAN	0	0	2	0		
SINARA	0	0	2	0		
UTTZ	0	0	1	0		
ANKAI	0	0	0	1		-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	3	-100,0	-100,0
<b>TOTAL</b>	<b>2 501</b>	<b>2 209</b>	<b>12 836</b>	<b>19 704</b>	<b>13,2</b>	<b>-34,9</b>
<b>TOTAL Russian brands</b>	<b>2 112</b>	<b>1 776</b>	<b>10 265</b>	<b>15 401</b>	<b>18,9</b>	<b>-33,3</b>
<b>TOTAL foreign brands</b>	<b>389</b>	<b>433</b>	<b>2 571</b>	<b>4 303</b>	<b>-10,2</b>	<b>-40,3</b>



# BUSES

## Sales of new electric buses in Russia in December and 12 months 2025 by brand

Brand / electric buses	Decemder 2025	Decemder 2024	12 months 2025	12 months 2024	Change Decemder 2025 vs 2024, %	Change 12 months 2025 vs 2024, %
KAMAZ	58	26	465	599	123,1	-22,4
LIAZ	0	29	37	337	-100,0	-89,0
BMZ	0	9	21	12	-100,0	75,0
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	0	0	1		-100,0
BKM	0	0	0	27		-100,0
<b>TOTAL</b>	<b>58</b>	<b>64</b>	<b>527</b>	<b>1 072</b>	<b>-9,4</b>	<b>-50,8</b>
<b>TOTAL Russian brands</b>	<b>58</b>	<b>64</b>	<b>527</b>	<b>1 044</b>	<b>-9,4</b>	<b>-49,5</b>
<b>TOTAL foreign brands</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>28</b>		<b>-100,0</b>



# BUSES

## Top 25 model ranking of new bus sales in December and 12 months 2025

Rank	Model	Brand	December 2025	December 2024	12 months 2025	12 months 2024	Change December 2025 vs 2024, %	Change 12 months 2025 vs 2024, %
1	VECTOR NEXT	PAZ	697	428	2 765	3 841	62,9	-28,0
2	3205	PAZ	230	263	1 654	2 435	-12,5	-32,1
3	4234	PAZ	175	217	1 448	1 612	-19,4	-10,2
4	5299, 5297 4X2	NEFAZ, KAMAZ	305	119	956	1 536	156,3	-37,8
5	CITYMAX 12	LIAZ	173	320	895	2 119	-45,9	-57,8
6	6127	YUTONG	103	40	806	940	157,5	-14,3
7	CITYRITM 12	VOLGABUS	97	18	405	149	438,9	171,8
8	4238	KAVZ	54	76	394	378	-28,9	4,2
9	5222	KAMAZ	58	0	385	0		
10	203	MAZ	75	105	368	260	-28,6	41,5
11	2258	SIMAZ	28	36	178	239	-22,2	-25,5
12	KLQ-SERIES	HIGER	18	11	173	91	63,6	90,1
13	6899	YUTONG	17	17	169	288	0,0	-41,3
14	KLQ 6129	HIGER	46	26	167	215	76,9	-22,3
15	4298	VOLGABUS	54	22	142	339	145,5	-58,1
16	105	LOTOS	97	38	140	269	155,3	-48,0
17	LCK-SERIES	ZHONGTONG	9	17	129	312	-47,1	-58,7
18	6122	YUTONG	7	41	116	610	-82,9	-81,0
19	4292	LIAZ	12	0	103	250		-58,8
20	6128	YUTONG	10	5	100	84	100,0	19,0
21	3204	PAZ	6	2	95	42	200,0	126,2
22	XML	GOLDEN DRAGON	8	5	90	153	60,0	-41,2
23	VEGA	KAMAZ	39	38	86	50	2,6	72,0
24	4270	KAVZ	49	14	85	125	250,0	-32,0
25	6282	KAMAZ	0	26	80	599	-100,0	-86,6

### 12 months 2025

PAZ VECTOR NEXT

2 765 units **-28%**

PAZ 3205

1 654 units **-32,1%**



PAZ 4234

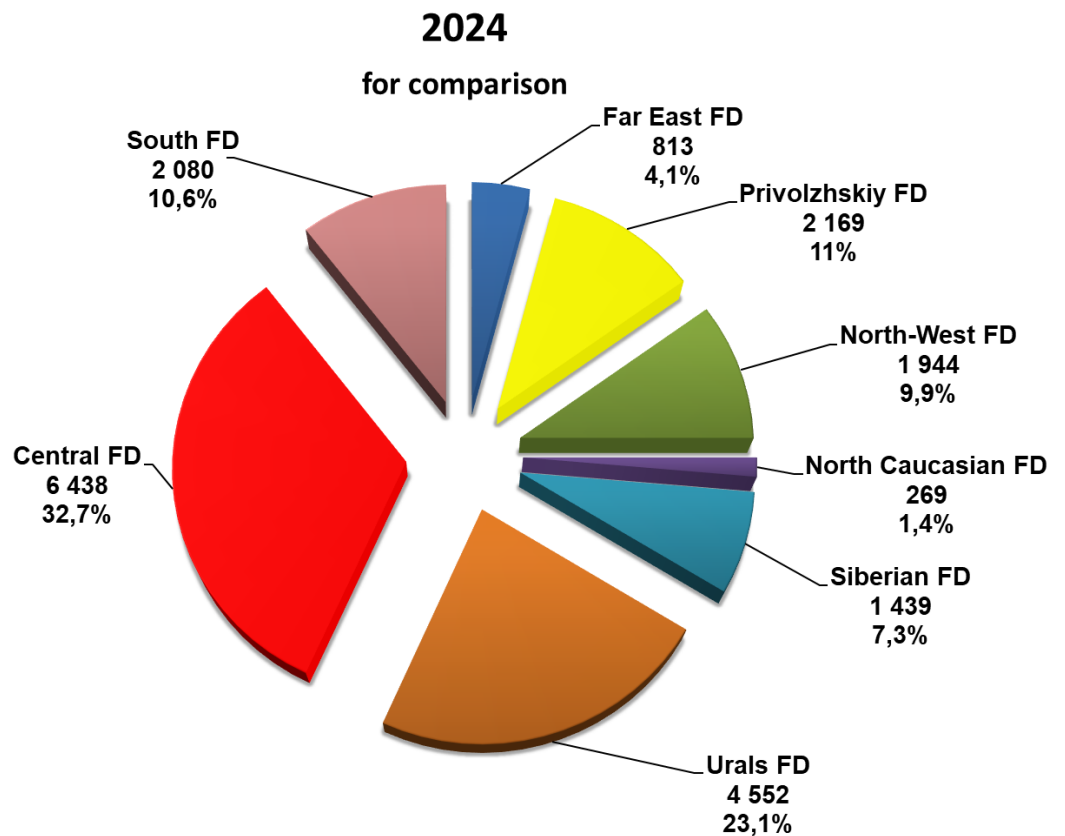
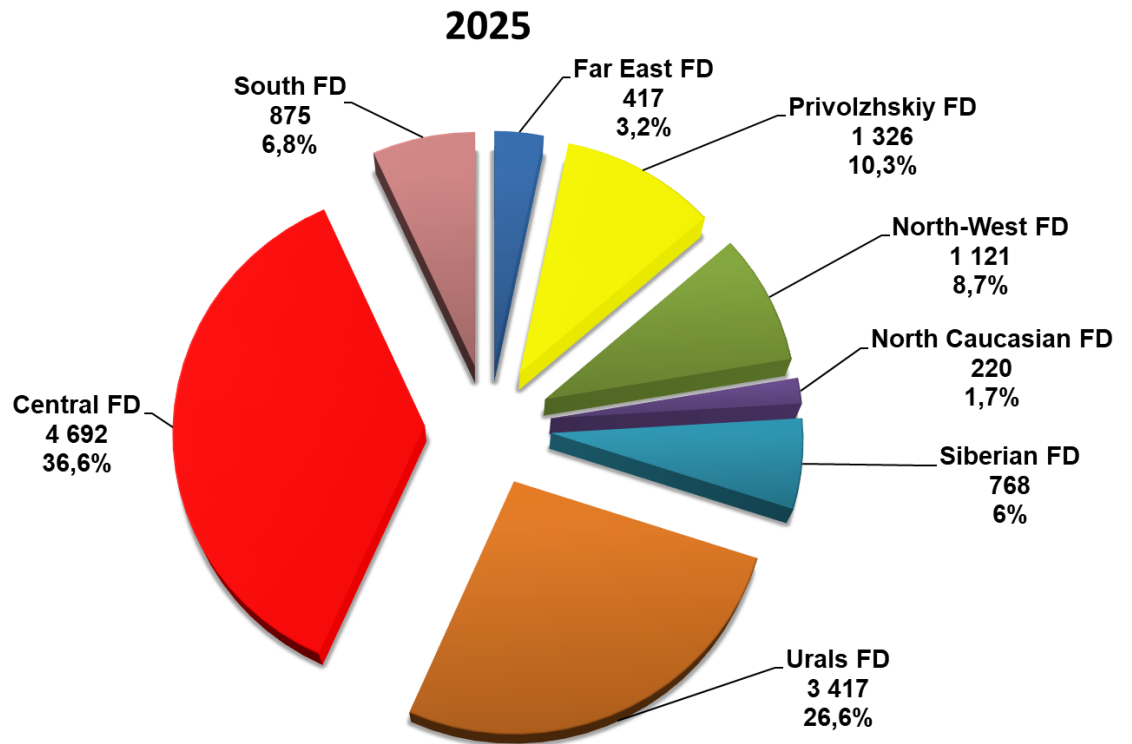
1 448 units **-10,2%**





# BUSES

## Structure of new bus sales in Russia in 12 months 2025 by Federal District



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