



PRESS-RELEASE

15 APRIL 2024

AUTOMOBILE MARKET OF RUSSIA IN MARCH AND JANUARY-MARCH 2024 TRUCKS AND BUSES

In March and in January-March 2024, sales of new trucks and buses in Russia showed the following results*:

- Trucks (except light trucks, N1 category) including special-purpose vehicles – 11 645 units in March 2024, up 3.2% YOY; 29 784 units in January-March 2024, up 11.0% YOY.
- Buses and coaches (except minibuses, M2 category) – 2 149 units in March 2024, up 47.3% YOY; 5 323 units in January-March 2024, up 24.1%. Among them – electric buses: 93 units in March 2024, 0% YOY; 299 units in January-March 2024, up 14 850% YOY.

* without sales to military, law enforcement and diplomatic agencies in RF

COMMENT:

Alexander Kovrigin, Deputy Managing Director of ASM Holding, commented:

Sales of trucks on the Russian market increased by 3.2% in March 2024 and by 11% year-to-date. We forecast annual sales in this segment through 2024 on the high level reached in 2023 for account of the Chinese-branded trucks.

We have noted growth of bus sales by 47.3% in March 2024 and by 24.1% in the first quarter of the year. We expect that the annual bus sales in Russia will grow in 2024 by 20% as compared with the result of 2023.

A big market share of Chinese trucks which approached 55% in Q1 affects adversely domestic vehicle and component manufacturers posing a threat to the national security and technological sovereignty in production of commercial and special-purpose vehicles. We think that measures should be further taken to protect the domestic truck market, as well as to promote investment by Chinese manufacturers in creation and development of motor vehicle and automotive component production in Russia to replace the foreign companies that have left the country.

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TRUCKS

Sales of new trucks in Russia in March and 3 months 2024 by brand, inclusive of special-purpose vehicles

Brand	March 2024	March 2023	3 months 2024	3 months 2023	Change March 2024 vs 2023, %	Change 3 months 2024 vs 2023, %
SITRAK	2 193	1 595	5 991	4 063	37,5	47,5
KAMAZ	1 949	2 946	5 038	6 774	-33,8	-25,6
SHAANXI	1 500	1 474	3 673	3 659	1,8	0,4
FAW	1 327	989	2 888	2 370	34,2	21,9
DONGFENG	622	181	1 745	248	243,6	603,6
GAZ	702	600	1 741	1 534	17,0	13,5
MAZ	504	569	1 354	1 419	-11,4	-4,6
HOWO	435	769	1 180	1 833	-43,4	-35,6
FOTON	412	412	957	702	0,0	36,3
JAC	374	316	947	707	18,4	33,9
URAL	358	401	939	848	-10,7	10,7
MERCEDES	242	77	826	212	214,3	289,6
SANY	215	90	537	174	138,9	208,6
ISUZU	125	56	272	174	123,2	56,3
ZOOMLION	78	73	194	183	6,8	6,0
HONGYAN	81	142	181	278	-43,0	-34,9
XU GONG	50	90	175	243	-44,4	-28,0
MAN	64	65	164	204	-1,5	-19,6
VOLVO	67	82	160	146	-18,3	9,6
AMT	50	13	137	86	284,6	59,3
DAF	59	45	114	139	31,1	-18,0
DAEWOO	50	107	97	215	-53,3	-54,9
SCANIA	29	46	89	114	-37,0	-21,9
DAYUN	28	5	75	33	460,0	127,3
HINO	20	10	52	50	100,0	4,0
HYUNDAI	23	64	50	213	-64,1	-76,5
BEIBEN	11	0	44	0		
BEIFANG BENCHI	9	0	26	0		
VALDAI	2	0	21	0		
RENAULT	1	12	14	20	-91,7	-30,0
ZIL	12	1	14	1	1 100,0	1 300,0
FORD	10	16	12	33	-37,5	-63,6
FUSO	6	23	11	46	-73,9	-76,1
LIUGONG	8	0	10	0		
SDAC	3	0	9	0		
IVECO	3	6	8	85	-50,0	-90,6
NEFAZ	5	5	8	14	0,0	-42,9
AVIA	5	0	6	0		
CHENGLIWEI	6	0	6	0		
MAZ MAN	5	4	6	8	25,0	-25,0
MZKT	0	0	5	0		
BAW	1	0	4	0		



TRUCKS

Brand	March 2024	March 2023	3 months 2024	3 months 2023	Change March 2024 vs 2023, %	Change 3 months 2024 vs 2023, %
TATRA	0	0	2	2		0,0
CHUSHENG	1	0	1	0		
LANDWIND JIANGLING - JMC	0	0	1	0		
AMUR	0	1	0	1	-100,0	-100,0
BURAN	0	0	0	2		-100,0
FENGCHUEN	0	0	0	1		-100,0
KIA	0	0	0	1		-100,0
KOLUMAN	0	0	0	1		-100,0
LIEBHERR	0	4	0	7	-100,0	-100,0
YUEJIN	0	0	0	1		-100,0
TOTAL	11 645	11 289	29 784	26 844	3,2	11,0
TOTAL Russian brands	3 078	3 967	7 898	9 260	-22,4	-14,7
TOTAL foreign brands	8 567	7 322	21 886	17 584	17,0	24,5

Sales of new trucks in Russia in March and 3 months 2024 by type

Type	March 2024	March 2023	3 months 2024	3 months 2023	Market share March 2024, %	Market share March 2023, %	Market share 3 months 2024, %	Market share 3 months 2023, %
Other special equipment	4 056	4 786	10 100	11 593	34,8	42,4	33,9	43,2
Truck-tractor	3 425	1 832	8 902	4 148	29,4	16,2	29,9	15,5
Other truck types	1 434	1 029	3 697	2 330	12,3	9,1	12,4	8,7
Dump truck	1 016	2 208	2 643	5 565	8,7	19,6	8,9	20,7
Drop-side flat bed	895	610	2 165	1 407	7,7	5,4	7,3	5,2
Refrigerator	142	343	599	619	1,2	3,0	2,0	2,3
Van	334	161	818	369	2,9	1,4	2,8	1,4
Autocrane	186	188	479	471	1,6	1,7	1,6	1,8
Tanker	109	114	278	239	0,9	1,0	0,9	0,9
Mobile repair shop	26	9	52	60	0,2	0,1	0,2	0,2
Refueler	21	9	48	25	0,2	0,1	0,2	0,1
Autoloader	1	0	1	1	0,0	0,0	0,0	0,0
Other	0	0	2	17	0,0	0,0	0,0	0,1
TOTAL	11 645	11 289	29 784	26 844	100,0	100,0	100,0	100,0



TRUCKS

Top 25 model ranking of new truck sales in Russia in March and 3 months 2024

Rank	Model	Brand	March 2024	March 2023	3 months 2024	3 months 2023	Change March 2024 vs 2023, %	Change 3 months 2024 vs 2023, %
1	C7H 4X2	SITRAK	1 581	1 035	4 312	2 722	52,8	58,4
2	GAZON NEXT	GAZ	555	483	1 386	1 261	14,9	9,9
3	43118 6X6	KAMAZ	502	799	1 300	1 852	-37,2	-29,8
4	J6 6X4	FAW	507	859	1 251	2 119	-41,0	-41,0
5	C7H 6X4	SITRAK	400	291	1 194	626	37,5	90,7
6	SX 331 8X4	SHAANXI	437	675	1 129	1 592	-35,3	-29,1
7	J7 4X2	FAW	608	0	1 103	0		
8	DFH-SERIES	DONGFENG	391	177	1 085	242	120,9	348,3
9	SX 425 6X4	SHAANXI	338	213	925	522	58,7	77,2
10	SX 325 6X4	SHAANXI	410	512	919	1 397	-19,9	-34,2
11	ACTROS	MERCEDES	239	58	817	180	312,1	353,9
12	65115 6X4	KAMAZ	307	500	788	1 233	-38,6	-36,1
13	5490 4X2	KAMAZ	224	237	690	490	-5,5	40,8
14	4320 6X6	URAL	269	211	645	493	27,5	30,8
15	AUMAN	FOTON	268	392	633	649	-31,6	-2,5
16	SX 418 4X2	SHAANXI	238	41	544	42	480,5	1 195,2
17	HFC-SERIES	JAC	216	215	509	356	0,5	43,0
18	C7H 8X4	SITRAK	212	269	471	715	-21,2	-34,1
19	DFA-SERIES	DONGFENG	176	0	447	0		
20	T5G 8X4	HOWO	151	0	394	0		
21	6312 6X4	MAZ	111	107	344	222	3,7	55,0
22	KOMPAS 9 4X2	KAMAZ	150	170	342	198	-11,8	72,7
23	T5G 6X4	HOWO	140	515	328	1 179	-72,8	-72,2
24	5340 4X2	MAZ	134	60	327	177	123,3	84,7
25	KOMPAS 12 4X2	KAMAZ	117	63	326	86	85,7	279,1

3 months 2024

SITRAK C7H 4X2
4 312 units **58,4%**

GAZ GAZON NEXT
1 386 units **9,9%**

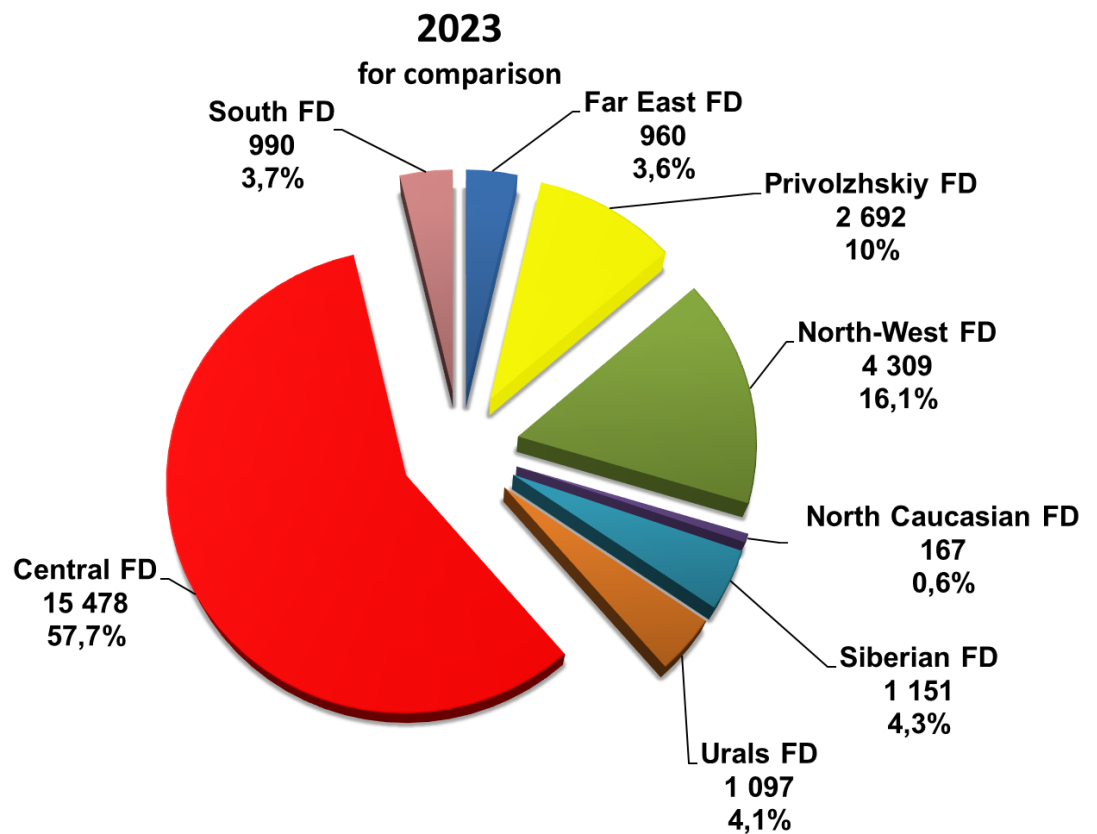
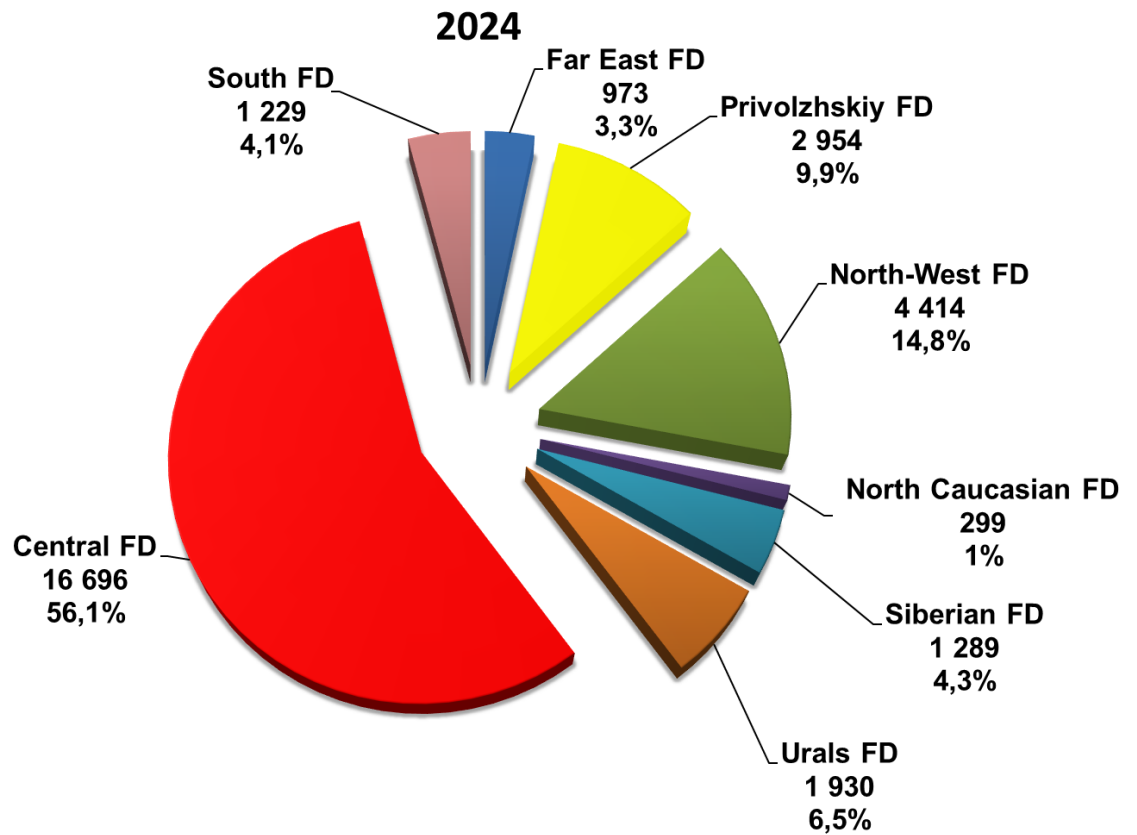
KAMAZ 43118 6X6
1300 units **-29,8%**





TRUCKS

Structure of sales of new truck in Russia in 3 months 2024 by Federal District





BUSES

Sales of new buses in Russia in March and 3 months 2024 by brand

Brand	March 2024	March 2023	3 months 2024	3 months 2023	Change March 2024 vs 2023, %	Change 3 months 2024 vs 2023, %
PAZ	1 170	728	2 475	1 969	60,7	25,7
NEFAZ	250	135	570	358	85,2	59,2
LIAZ	153	167	530	565	-8,4	-6,2
YUTONG	171	88	401	314	94,3	27,7
VOLZHANIN	79	90	284	236	-12,2	20,3
MAZ	79	99	226	314	-20,2	-28,0
KAVZ	47	23	188	90	104,3	108,9
HIGER	57	45	164	145	26,7	13,1
KAMAZ	16	0	116	1		11 500,0
LOTOS	28	0	93	62		50,0
SIMAZ	26	30	72	77	-13,3	-6,5
URAL	14	8	51	20	75,0	155,0
ZHONGTONG	22	17	46	53	29,4	-13,2
GOLDEN DRAGON	18	1	30	8	1 700,0	275,0
KING LONG (KLM)	7	16	25	24	-56,2	4,2
JAC	5	9	23	46	-44,4	-50,0
BKM	0	0	11	0		
SAZ	4	1	9	1	300,0	800,0
NEMAN	1	0	6	0		
FOTON	2	0	2	1		100,0
ASIASTAR	0	0	1	0		
ANKAI	0	1	0	3	-100,0	-100,0
MAN	0	1	0	1	-100,0	-100,0
SETRA	0	0	0	1		-100,0
SIRIUS	0	0	0	1		-100,0
TOYOTA	0	0	0	1		-100,0
TOTAL	2 149	1 459	5 323	4 291	47,3	24,1
TOTAL Russian brands	1 783	1 181	4 379	3 379	51,0	29,6
TOTAL foreign brands	366	278	944	912	31,7	3,5



BUSES

Sales of new electric buses in Russia in March and 3 months 2024 by brand

Brand / electric buses	March 2024	March 2023	3 months 2024	3 months 2023	Change March 2024 vs 2023, %	Change 3 months 2024 vs 2023, %
KAMAZ	16	0	116	1		11500,0
LIAZ	17	0	77	0		
NEFAZ	54	0	73	0		
VOLZHANIN	6	0	22	0		
BKM	0	0	11	0		
SIRIUS	0	0	0	1		-100,0
TOTAL	93	0	299	2		14850,0
TOTAL Russian brands	93	0	288	2		14300,0
TOTAL foreign brands	0	0	11	0		



BUSES

Top 25 model ranking of new bus sales in March and 3 months 2024

Rank	Model	Brand	March 2024	March 2023	3 months 2024	3 months 2023	Change March 2024 vs 2023, %	Change 3 months 2024 vs 2023, %
1	3205	PAZ	348	369	933	866	-5,7	7,7
2	VECTOR NEXT	PAZ	530	203	894	402	161,1	122,4
3	4234	PAZ	258	153	571	508	68,6	12,4
4	5299, 5297 4X2	NEFAZ, KAMAZ	242	112	525	305	116,1	72,1
5	5292	LIAZ	120	110	336	324	9,1	3,7
6	6127	YUTONG	67	3	162	13	2 133,3	1 146,2
7	6122	YUTONG	65	9	140	51	622,2	174,5
8	6282	KAMAZ	16	0	116	1		11 500,0
9	4292	LIAZ	16	56	112	236	-71,4	-52,5
10	VOLGABUS 4298	VOLZHANIN	20	71	111	129	-71,8	-14,0
11	105	LOTOS	28	0	93	62		50,0
12	203	MAZ	16	37	79	75	-56,8	5,3
13	KLQ 6129	HIGER	34	15	78	33	126,7	136,4
14	4238	KAVZ	26	14	75	63	85,7	19,0
15	2258	SIMAZ	26	30	72	77	-13,3	-6,5
16	5285 SCANIA 4X2	VOLZHANIN	0	0	64	0		
17	CITYMAX 9	PAZ	28	0	62	0		
18	6274	LIAZ	16	0	61	0		
19	4235	KAVZ	11	9	57	27	22,2	111,1
20	4270	KAVZ	10	0	56	0		
21	6938	YUTONG	14	12	55	55	16,7	0,0
22	3255 4320 6X6	URAL	14	8	51	20	75,0	155,0
23	216	MAZ	0	0	50	0		
24	21512169	MAZ	38	0	48	0		
25	LCK-SERIES	ZHONGTONG	22	17	46	53	29,4	-13,2

3 months 2024

PAZ 3205
933 units **7,7%**

PAZ VECTOR NEXT
894 units **122,4%**

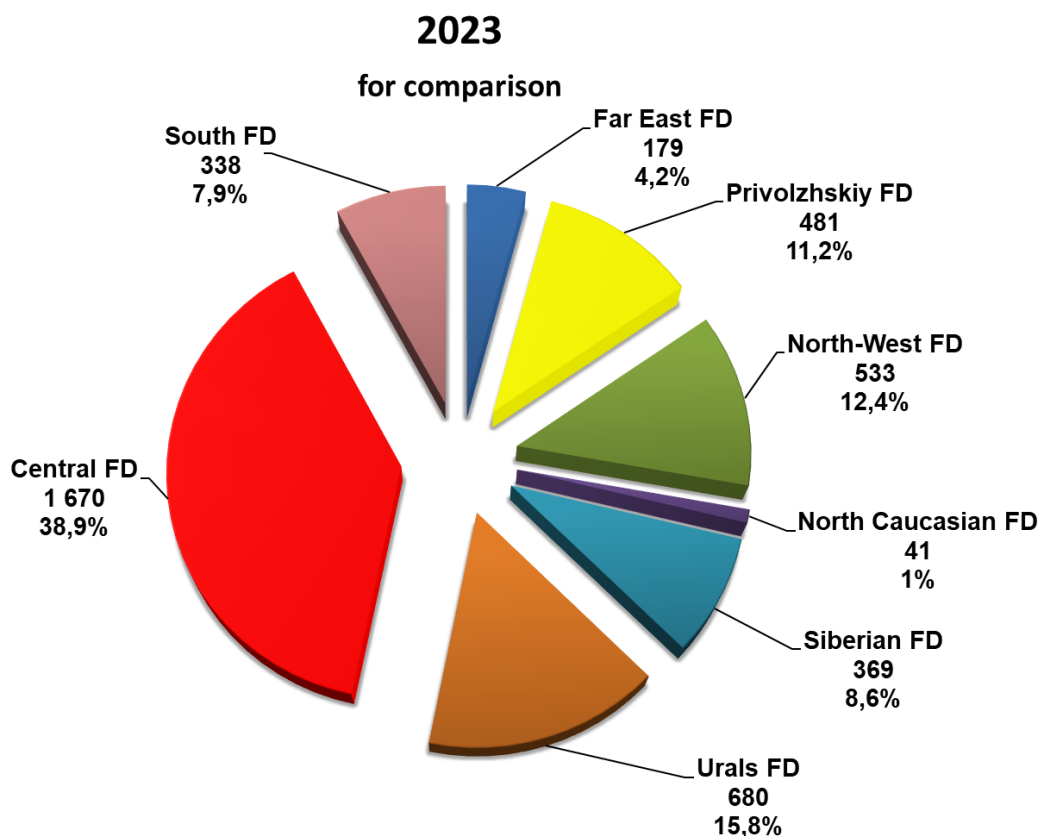
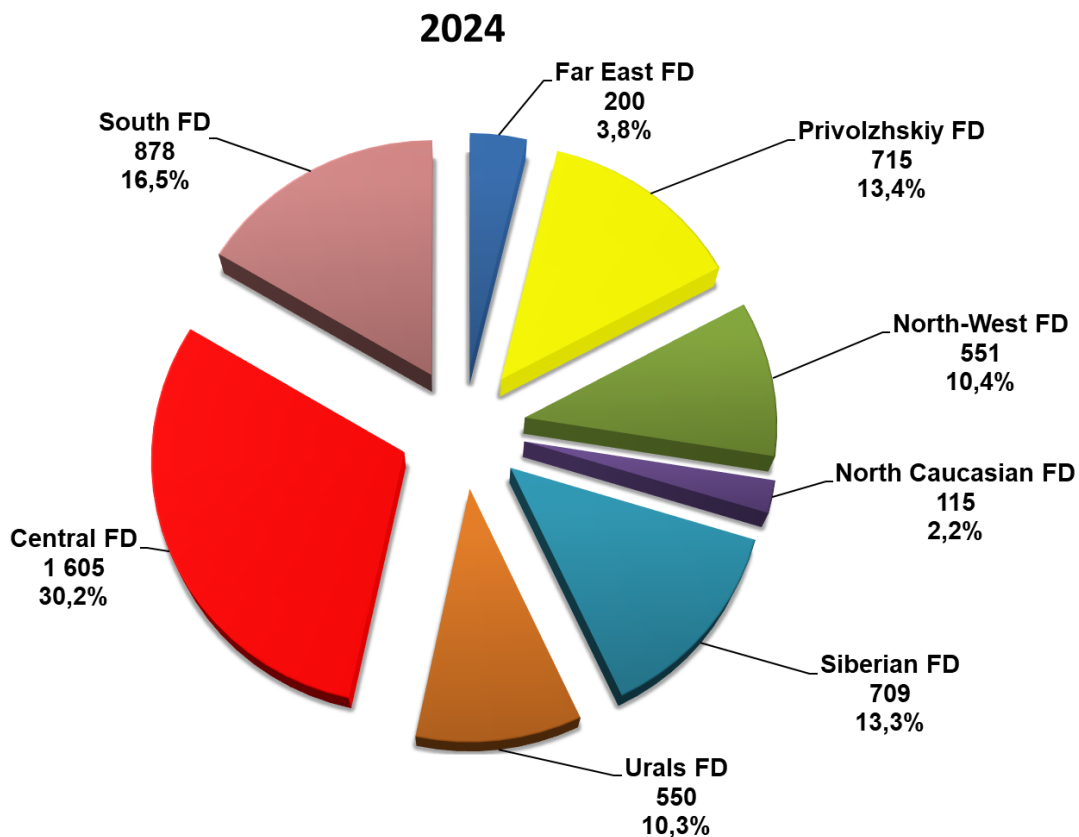
PAZ 4234
571 units **12,4%**





BUSES

Structure of new bus sales in Russia in 3 months 2024 by Federal District



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