RACE TO ZERO: EUROPEAN HEAVY-DUTY VEHICLE MARKET DEVELOPMENT QUARTERLY (JANUARY–MARCH 2026)

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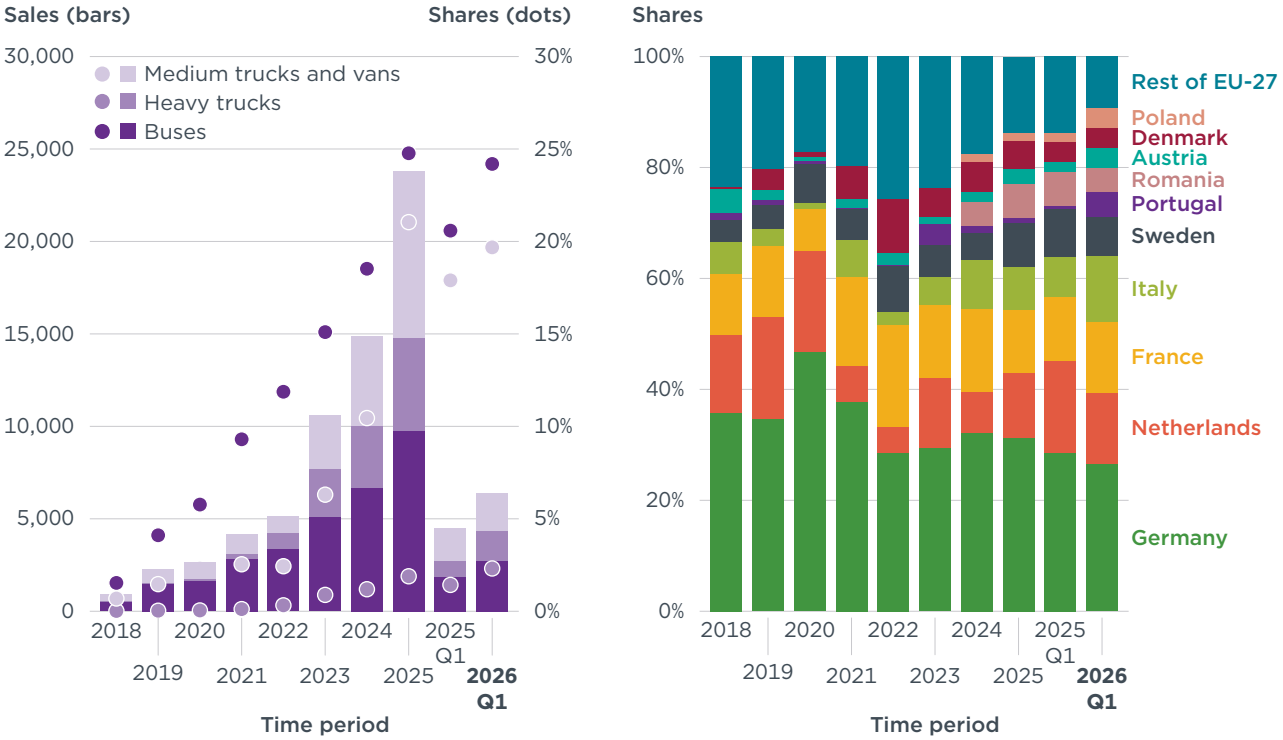
Zero-emission heavy-duty vehicle sales in the EU by vehicle type (left) and Member State (right)



SUMMARY

Over 6,355 new zero-emission heavy-duty vehicles (ZE-HDVs) were registered in the European Union (EU) in the first quarter (Q1) of 2026. ZE trucks (with a weight above 3.5 tonnes) had a sales share of 4.5% in Q1 2026, up from 3.6% in Q1 2025. ZE buses and coaches had a sales share of 24.1%, up from 20.2% in Q1 2025.

Sales of ZE heavy trucks (with a weight above 12 tonnes) grew rapidly over the past year, nearly doubling from 900 in Q1 2025 (1.4% of all sales) to 1,600 in Q1 2026 (2.3%). Growth was likely bolstered by the introduction of the first CO_2 reduction target for this segment in Q3 2025, of 15%. Mercedes remained the top seller of ZE heavy trucks in Q1 2026 followed closely by MAN, which saw a steady rise in sales of its electric TGS and TGX models over the last year.

Sales of ZE medium trucks and vans (with a weight between 3.5 and 12 tonnes) remained strong, with 2,000 sales in Q1 2026 (a 19.7% share) compared with 1,700 sales in Q1 2025 (17.9%). Nonetheless, this marked a slowdown from the rapid growth the sector has seen in recent years—sales shares doubled each year between 2022 and 2025 driven by the electric van sector. ZE sales also increased in the bus and coach sector, from 1,900 in Q1 2025 (a 20.2% share) to 2,700 in Q1 2026 (24.1%). As of 2026, Member States face higher targets for the public procurement of ZE buses under the second phase of the Clean Vehicle Directive, which runs from 2026 to 2030.

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OVERALL MARKET DEVELOPMENTS

Approximately 92,400 HDVs were sold in Europe in Q1 2026, up from 83,000 in Q1 2025, a 19.8% increase. By Member State, Spain's share of the overall HDV market grew the most in absolute terms, rising from 10.4% to 10.9% between Q1 2025 and Q1 2026, while the Netherlands recorded the strongest relative growth, climbing from 3.5% to 4.4% over the same period. France, by contrast, saw its share fall from 15.4% to 14.0%. HDV sales volumes grew sharply in Portugal (by 76%) between Q1 2025 and Q1 2026 while they fell in Belgium (by 10%) over the same period.

By manufacturer, IVECO experienced the largest percentage-point (pp) decrease in market share year-over-year, dropping 2.2 pp, followed by Volvo (1 pp), Scania (0.7 pp), and Renault (0.2 pp). By contrast, Mercedes (+2.4 pp), MAN (+1.1 pp), and DAF (+0.6 pp) registered the largest increases. The market shares of other manufacturers remained unchanged year-over-year.

Profit margins for Europe's major manufacturers followed a downward trend in 2025 according to financial reports published in Q1 2026. The main causes cited were lower unit volumes, high transformation costs, and varying regional market weaknesses. TRATON's adjusted operating margin fell from 9.2% to 6.3%,[1] Volvo Group's from 12.5% to 10.7%,[2] Iveco Group's from 5.4% to 4.0%,[3] and Daimler Truck's from 8.9% to 7.8%.[4]

Figure 1.1

Sales of heavy-duty vehicles by Member State share, Q1 2025 and Q1 2026

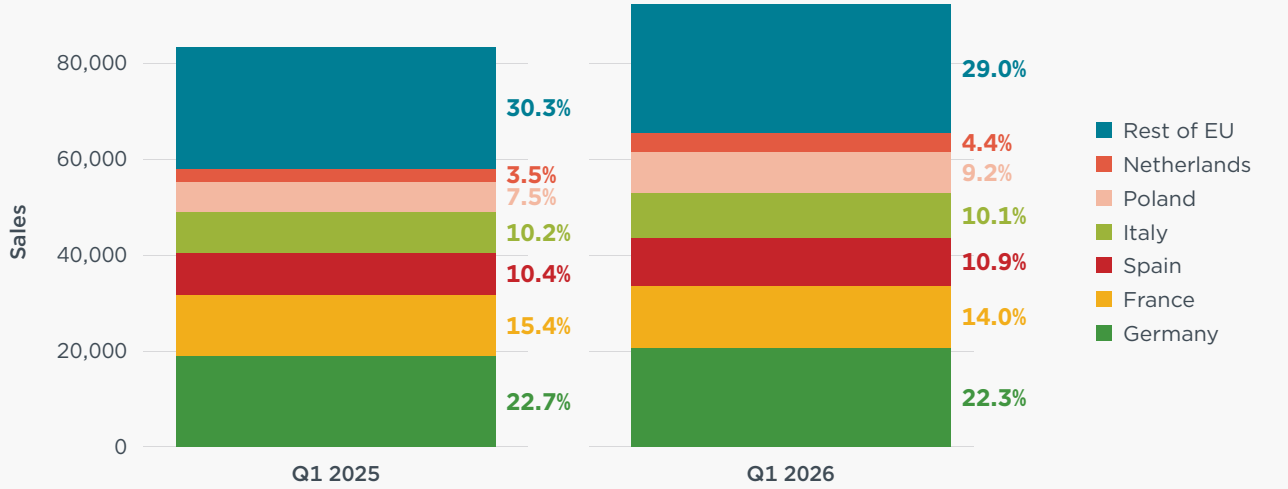

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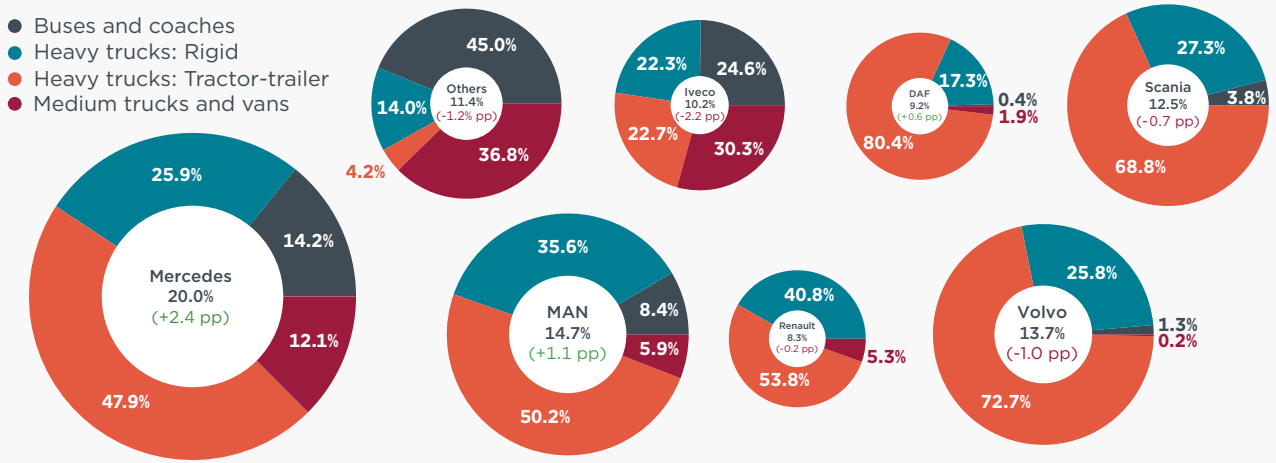
Figure 1.2

Manufacturer market share by vehicle segment, Q1 2026



Note: Values in parentheses denote percentage-point changes in market share relative to Q1 2025.

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HEAVY TRUCKS

TRUCKS WITH A GROSS VEHICLE WEIGHT ABOVE 12 TONNES

In Q1 2026, 69,800 heavy trucks were sold in the EU, of which around 1,600 were ZE vehicles—a 2.3% share, up from 1.4% in Q1 2025.

DAF and MAN made significant inroads in the sale of ZE heavy trucks in Q1 2026. DAF started series production of its electric XD and XF series in September 2025 and sold nearly 200 ZE heavy trucks in Q1 2026 (a 2.4% ZE sales share), up from just 12 sales in Q1 2025 (0.2%). Both trucks can be configured with a battery capacity up to 525 kWh, offering a declared range of over 500 km.[5] MAN more than doubled its sales share of ZE heavy trucks in Q1 2026, reaching 411 sales (a 3.6% share), up from 130 (1.4%) in Q1 2025, amid increased sales of its TGS and TGX models. Only Mercedes had a greater ZE heavy truck sales volume, selling 530 units in Q1 2026 (a 3.9% share), up from 95 sales (0.9%) in Q1 2025, driven primarily by the success of the eActros model. Iveco sold just 6 ZE heavy trucks in Q1 2026, representing a 0.1% sales share.

Sales of ZE heavy trucks increased notably in the Netherlands (338 sales, representing a 10.3% sales share), Sweden (125 sales, 9.7%), and Denmark (100 sales, 10.0%). Austria also saw significant growth, with ZE heavy truck uptake rising to 8.0% (138 vehicles) in Q1 2026, up from just 1.9% a year earlier. In June 2025, a subsidy program for trucks was introduced in Austria covering up to 60% of additional costs relative to a conventional vehicle and 40% of infrastructure.[6] Since 2024, Austria has also introduced CO_2-differentiated pricing for tolls under the Eurovignette Directive, with per-kilometer rates for ZE trucks set at 25% of those for diesel counterparts.[7] In March 2026, France announced subsidies of €60,000–€110,000 for ZE heavy trucks, which took effect on June 1, 2026.[8]

Figure 2.1
Sales of heavy trucks by powertrain, Q1 2026

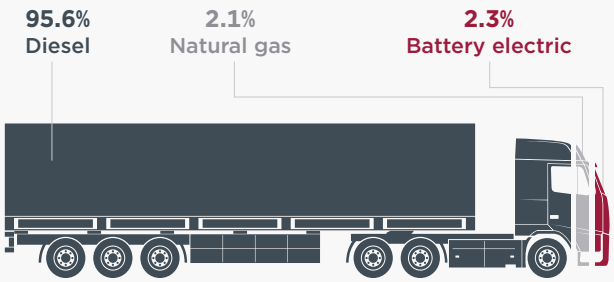

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Figure 2.2
Historic sales of zero-emission heavy trucks

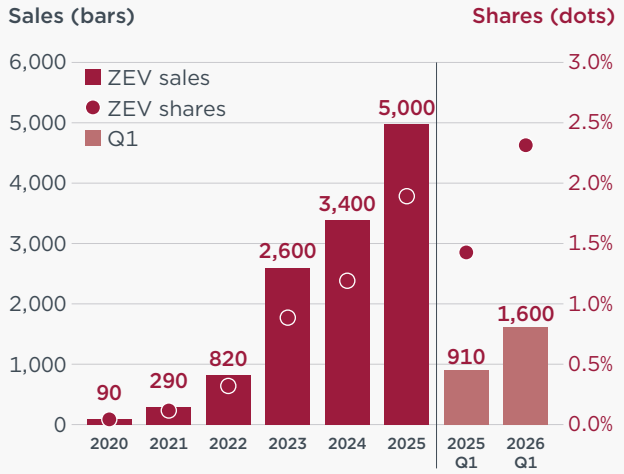

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Figure 2.3
Sales of heavy trucks by Vehicle Energy Consumption calculation TOol (VECTO) group and powertrain, Q1 2026

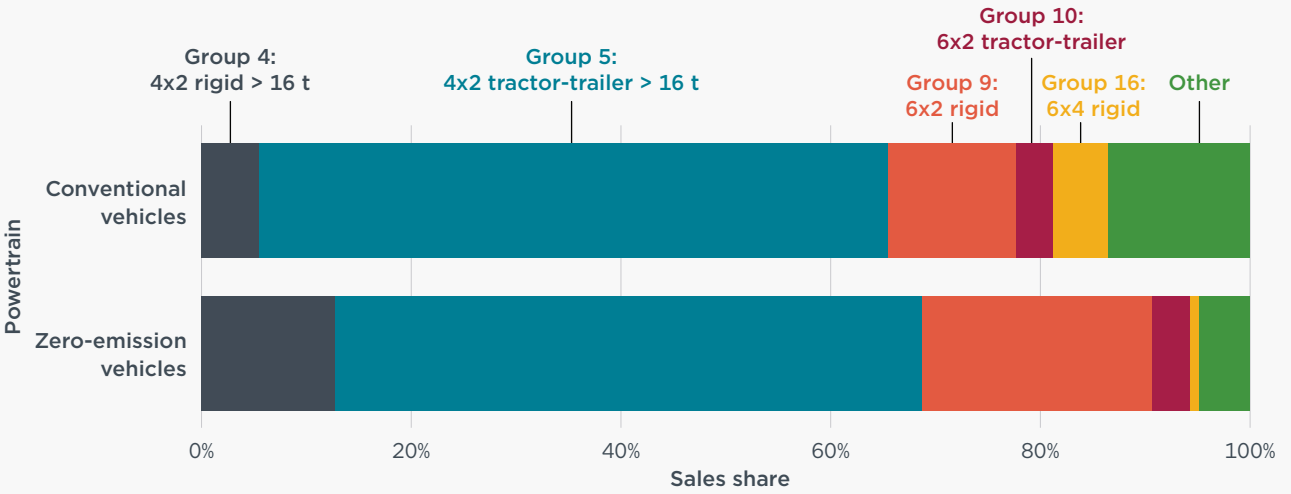

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Figure 2.4

Sales shares of zero-emission heavy trucks in select Member States

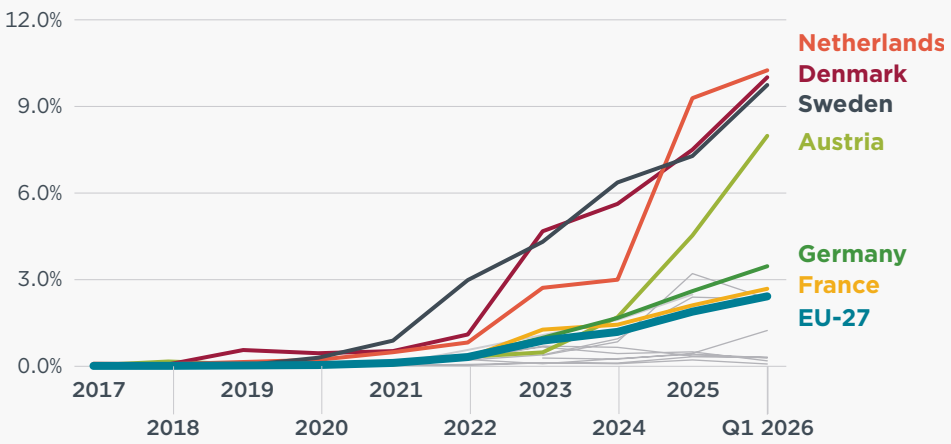

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Figure 2.5

Sales shares of heavy trucks by powertrain and manufacturer, Q1 2026

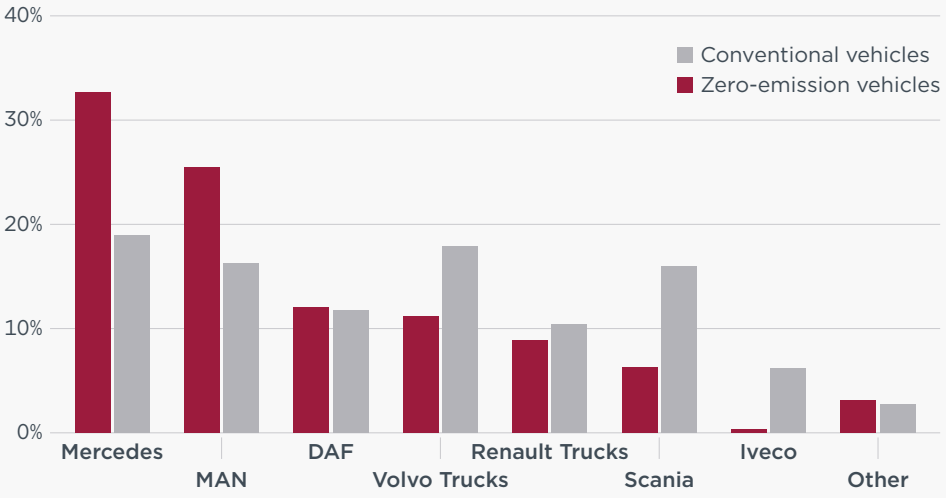

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Table 1

Sales of zero-emission heavy trucks by EU Member State

Country	Q1 2025	Q1 2026
Austria	32 (1.9%)	138 (8.0%)
Belgium	30 (1.2%)	51 (2.3%)
Croatia	0 (0.0%)	0 (0.0%)
Czechia	5 (0.3%)	1 (0.0%)
Denmark	35 (3.8%)	100 (10.0%)
Estonia	0 (0.0%)	0 (0.0%)
Finland	11 (1.9%)	6 (1.2%)
France	230 (2.2%)	267 (2.7%)
Germany	300 (2.1%)	536 (3.5%)
Greece	2 (1.6%)	3 (2.3%)
Hungary	2 (0.2%)	3 (0.3%)
Ireland	1 (0.1%)	3 (0.3%)
Italy	12 (0.2%)	20 (0.3%)
Latvia	0 (0.0%)	0 (0.0%)
Lithuania	0 (0.0%)	0 (0.0%)
Luxembourg	0 (0.0%)	3 (1.2%)
Netherlands	127 (6.1%)	338 (10.3%)
Poland	5 (0.1%)	3 (0.0%)
Portugal	3 (0.3%)	5 (0.3%)
Romania	0 (0.0%)	5 (0.2%)
Slovakia	1 (0.1%)	2 (0.2%)
Slovenia	0 (0.0%)	0 (0.0%)
Spain	23 (0.4%)	13 (0.2%)
Sweden	90 (7.3%)	125 (9.7%)
EU-27	909 (1.4%)	1,622 (2.3%)

Note: Sales shares are shown in parentheses.

MEDIUM TRUCKS AND VANS

TRUCKS AND VANS WITH A GROSS VEHICLE WEIGHT BETWEEN 3.5 TONNES AND 12 TONNES

In Q1 2026, 10,200 medium trucks and vans were sold in the EU, of which 2,000 were ZE vehicles—a 20% share, up from 18% the previous year.

The growth rate of ZE medium truck and van sales decelerated. Sales volumes roughly doubled each year between 2022 and 2025, rising from 900 sales in 2022 to 9,000 in 2025, but increased by just 16% in Q1 2026 relative to Q1 2025. The rapid market growth in this segment has been mostly concentrated in the van sector: over 64% of van sales were ZE in Q1 2026 compared with just 7% of medium truck sales. Trucks make up nearly three quarters of vehicle sales in the medium truck and van sector, and manufacturers have so far focused their efforts on increasing the availability of ZE models in the heavy truck segment, which has been subject to CO_2 targets since Q3 2025. Most medium trucks and vans will be required to reduce their average CO_2 emissions by 43% by 2030 relative to 2025 levels, which may yet drive more ZE models to the market in the coming years.

Continuing a trend from previous years, Mercedes, Iveco, and Ford comprised roughly 70% of the total ZE medium truck and van market. ZE sales shares remained particularly high in Denmark (57.7%), Sweden (60.7%), and the Netherlands (68.9%), although each showed a decline compared with 2025 shares. The introduction of zero-emission zones in 15 cities since January 2025 has likely driven in part the high share in the Netherlands; most trucks purchased from 2025 onward are required to have zero tailpipe emissions to be permitted entry into these zones.[9]

Figure 3.1
Sales of medium trucks and vans by powertrain, Q1 2026

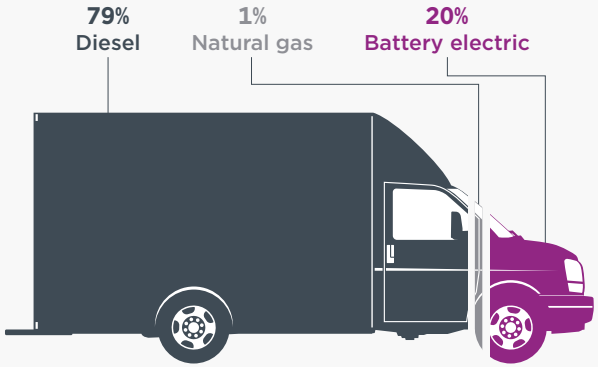

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Figure 3.2
Historic sales of zero-emission medium trucks and vans

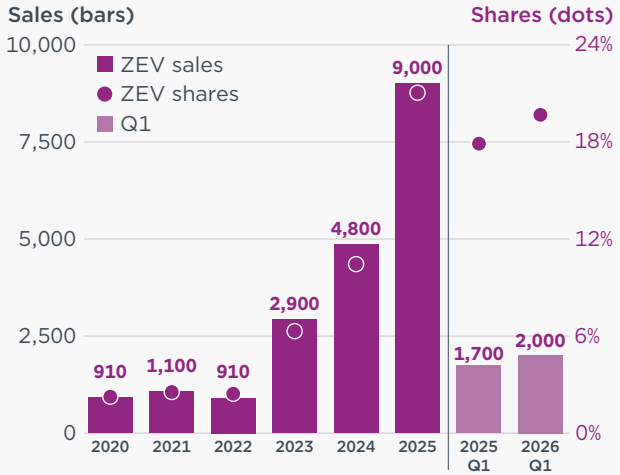

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Figure 3.3
Sales of medium trucks and vans by VECTO category and powertrain, Q1 2026

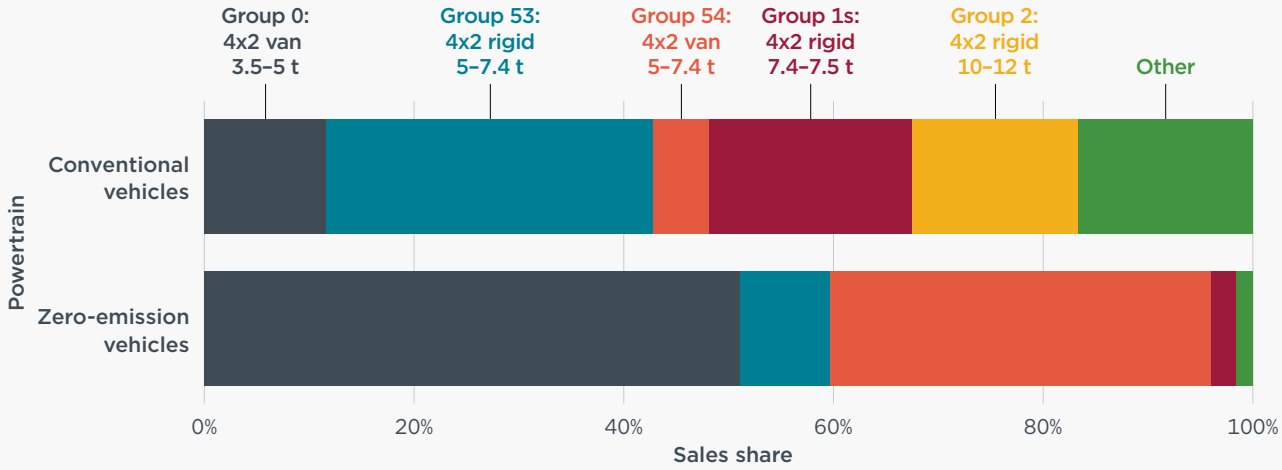

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Figure 3.4

Sales shares of zero-emission medium trucks and vans in select Member States

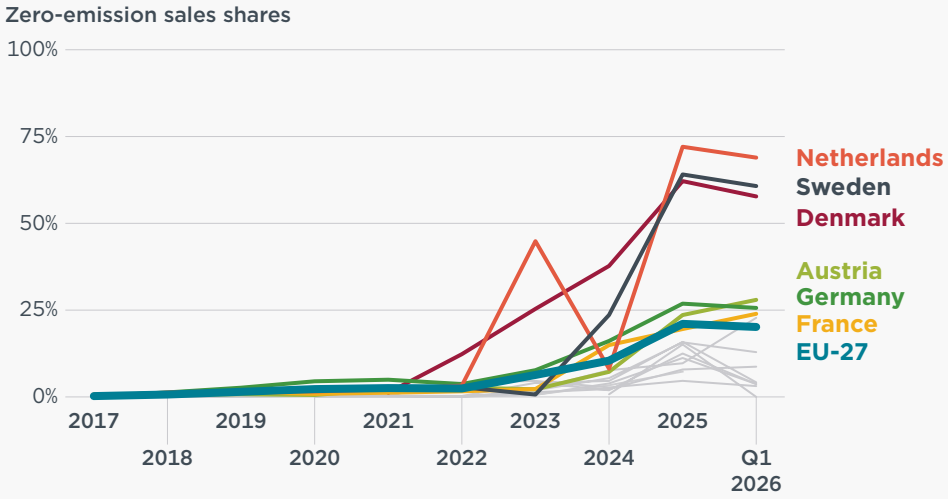

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Figure 3.5

Sales shares of medium trucks and vans by powertrain and manufacturer, Q1 2026

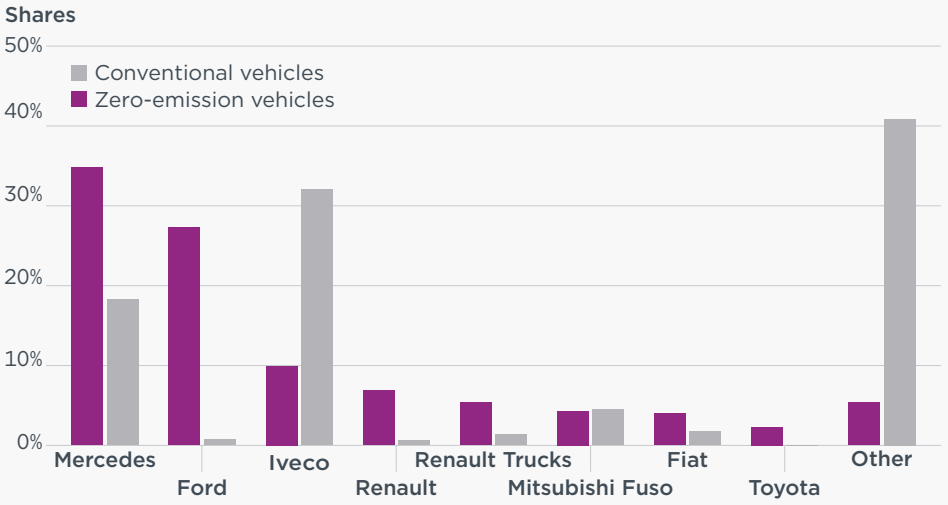

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Table 2

Sales of zero-emission medium trucks and vans EU Member States

Country	Q1 2025	Q1 2026
Austria	18 (14.4%)	26 (28.0%)
Belgium	34 (9.1%)	9 (3.7%)
Croatia	0 (0.0%)	0 (0.0%)
Cyprus	0 (0.0%)	1 (10.0%)
Czechia	10 (5.0%)	31 (13.9%)
Denmark	82 (56.2%)	82 (57.7%)
Estonia	0 (0.0%)	0 (0.0%)
Finland	6 (6.5%)	5 (3.2%)
France	138 (11.6%)	309 (23.9%)
Germany	605 (19.3%)	863 (25.6%)
Greece	1 (1.2%)	0 (0.0%)
Hungary	0 (0.0%)	3 (2.5%)
Ireland	12 (6.9%)	5 (3.5%)
Italy	134 (16.9%)	95 (11.7%)
Latvia	0 (0.0%)	0 (0.0%)
Lithuania	0 (0.0%)	0 (0.0%)
Luxembourg	1 (5.0%)	1 (3.7%)
Netherlands	505 (82.5%)	295 (68.9%)
Poland	12 (3.5%)	28 (5.9%)
Portugal	12 (8.8%)	49 (22.8%)
Romania	27 (20.8%)	17 (17.5%)
Slovakia	0 (0.0%)	2 (2.1%)
Slovenia	0 (0.0%)	0 (0.0%)
Spain	69 (3.8%)	65 (3.1%)
Sweden	71 (50.4%)	133 (60.7%)
EU-27	1,737 (17.9%)	2,019 (19.6%)

Note: Sales shares are shown in parentheses

BUSES AND COACHES

WITH A GROSS VEHICLE WEIGHT ABOVE 3.5 TONNES

In Q1 2026, 11,300 buses and coaches were sold in the EU, of which 2,700 were zero-emission vehicles—a 24% share, up from 20% in the same period the year before.

ZE city bus sales slowed in late 2025. After averaging close to 60% across Q1–Q3 2025, the sales share for ZE city buses fell to 54% in Q4 2025 before rebounding slightly to 55% in Q1 2026. ZE bus and coach sales rose markedly in Q1 2026 in Portugal (which recorded a 50% ZE sales share, up from 3% in Q1 2025), Italy (34%, up from 13%), and Lithuania (59%, up from 40%), while there were significant drops in Germany (16%, down from 29%), Belgium (28%, down from 44%), and most notably in Greece (2%, down from 50%).

Chinese manufacturers gained meaningful ground relative to more established European manufacturers in Q1 2026. Yutong led in terms of ZE sales share, the first time a Chinese brand has done so, with BYD and King Long also placing in the top eight.

Figure 4.1
Sales of city buses (top), inter-urban buses and coaches (middle), and minibuses (bottom) by powertrain, Q1 2026

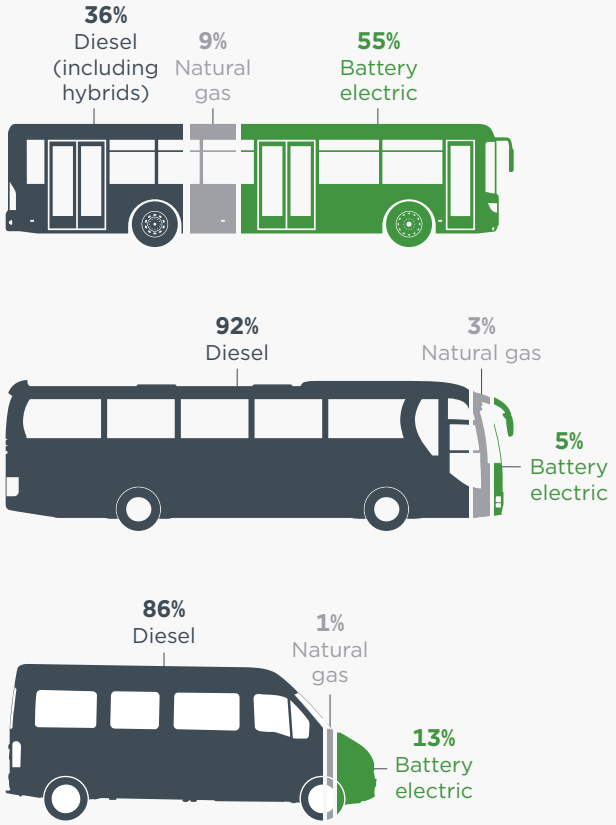

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Figure 4.2
Historic sales of zero-emission buses and coaches

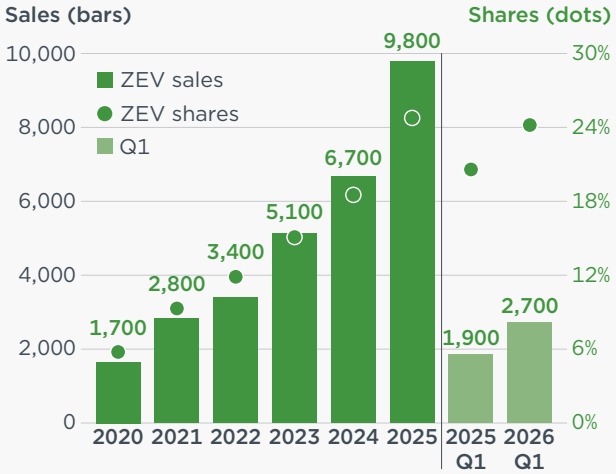

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Figure 4.3

Sales of city buses by powertrain

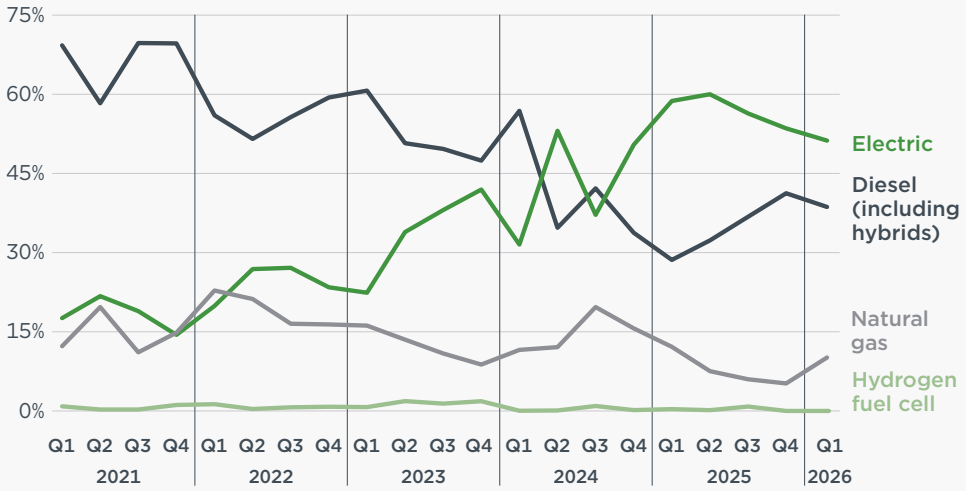

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Figure 4.4

Sales of city buses by powertrain and Member State, Q1 2026

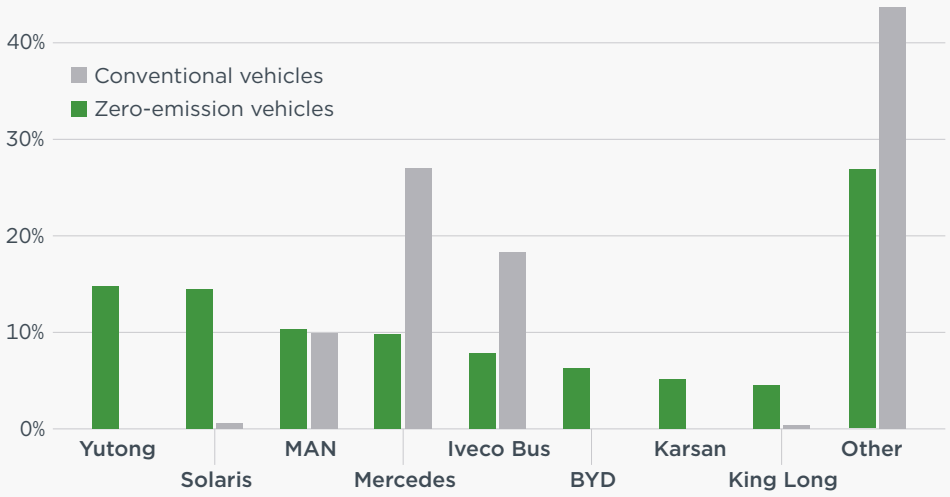

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Figure 4.5

Sales shares of buses and coaches by powertrain and manufacturer, Q1 2026

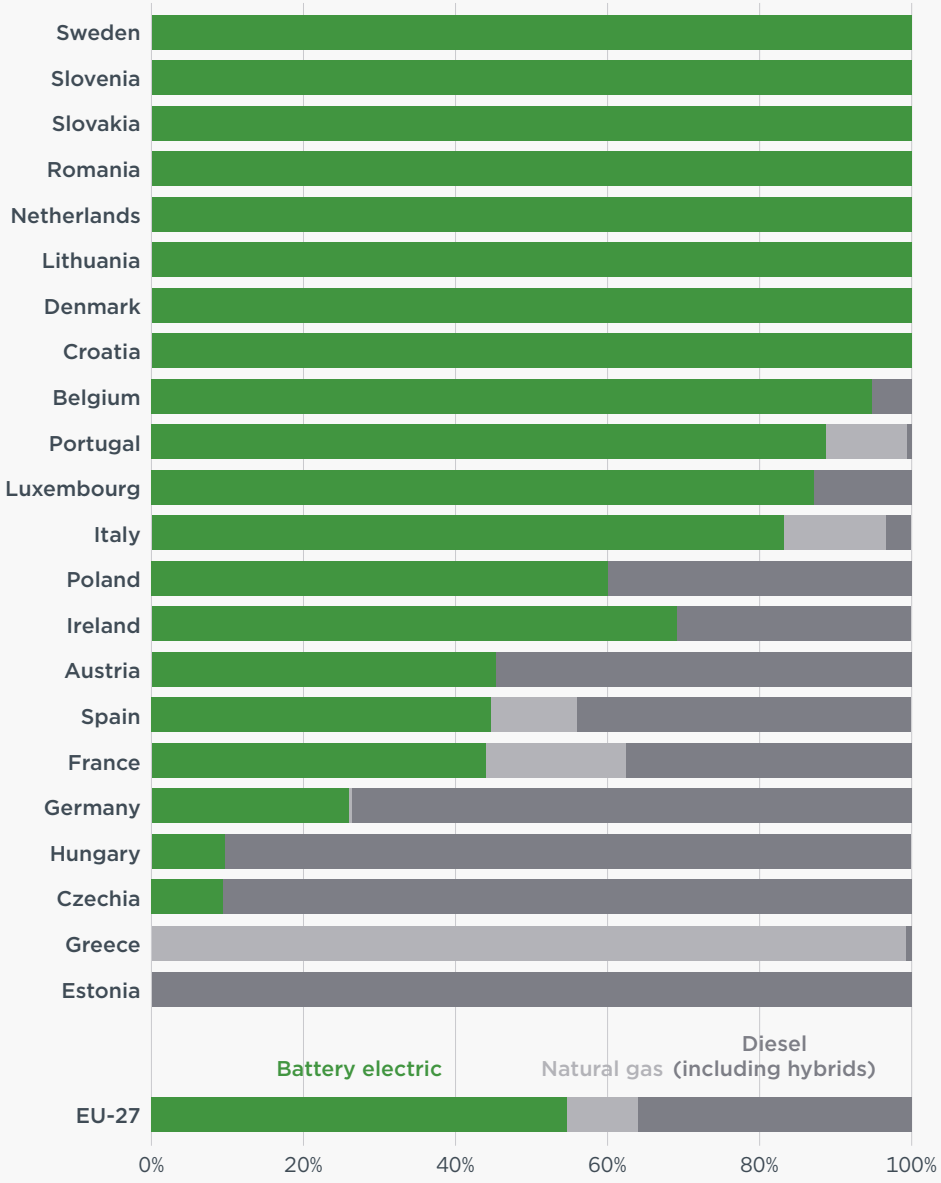

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Table 3

Sales of zero-emission buses and coaches in EU Member States

Country	Q1 2025	Q1 2026
Austria	38 (14.1%)	75 (23.5%)
Belgium	131 (43.8%)	93 (28.4%)
Croatia	1 (1.4%)	5 (6.2%)
Cyprus	0 (0.0%)	0 (0.0%)
Czechia	3 (1.2%)	6 (2.4%)
Denmark	48 (42.9%)	45 (37.8%)
Estonia	0 (0.0%)	0 (0.0%)
Finland	5 (21.7%)	8 (32.0%)
France	147 (10.4%)	239 (13.7%)
Germany	376 (28.4%)	285 (15.8%)
Greece	100 (50.3%)	4 (1.9%)
Hungary	4 (4.0%)	21 (7.3%)
Ireland	9 (2.4%)	18 (4.0%)
Italy	174 (12.6%)	631 (34.7%)
Latvia	10 (40.0%)	3 (10.7%)
Lithuania	39 (27.1%)	96 (60.8%)
Luxembourg	26 (24.8%)	34 (30.6%)
Netherlands	120 (54.1%)	188 (56.8%)
Poland	51 (11.4%)	191 (25.6%)
Portugal	5 (2.7%)	228 (49.6%)
Romania	246 (54.7%)	249 (53.1%)
Slovakia	0 (0.0%)	20 (23.8%)
Slovenia	0 (0.0%)	6 (8.0%)
Spain	46 (4.2%)	90 (8.5%)
Sweden	237 (62.7%)	197 (61.6%)
EU-27	1,816 (20.2%)	2,732 (24.2%)

Note: Sales shares are shown in parentheses

SPOTLIGHT: HOW MEMBER STATES PERFORMED IN THE FIRST PERIOD OF THE CLEAN VEHICLE DIRECTIVE

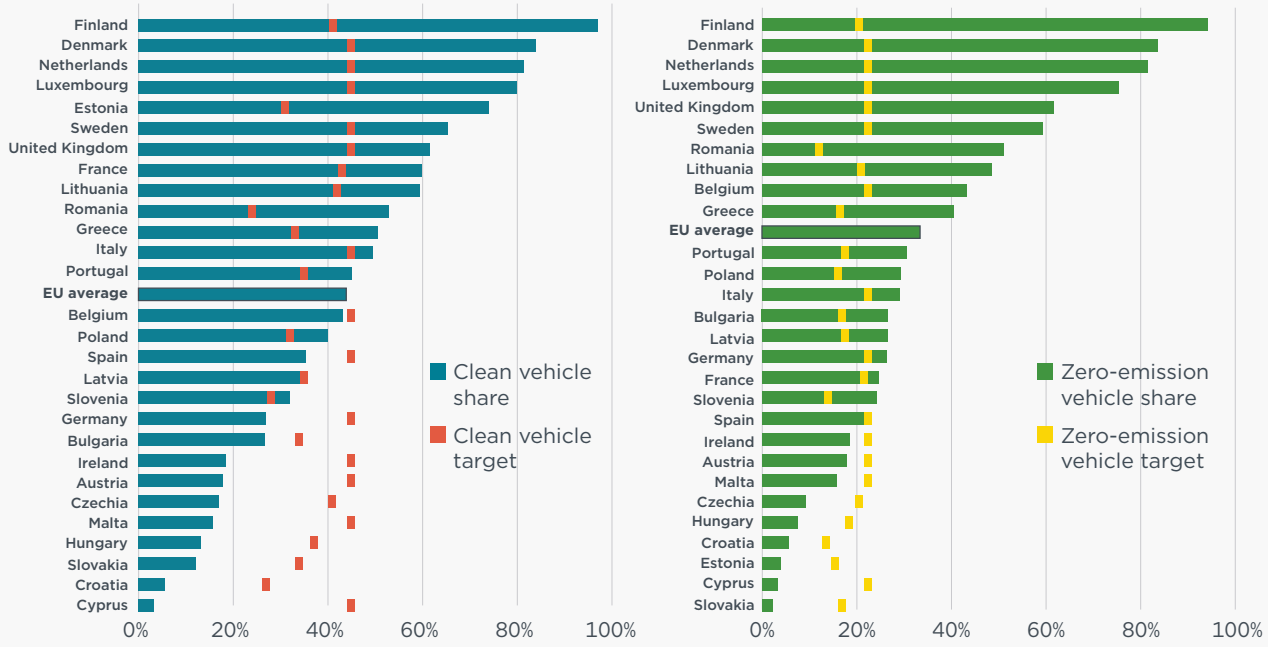
The Clean Vehicle Directive (CVD) was adopted in 2019.[10] It sets targets for each Member State regarding the share of publicly procured vehicles that must be clean[11] and, in the case of buses, zero-emission. Targets are set as an average over each reporting period, with initial values applying to 2021–2025 before rising over 2026–2030. Although targets are also in place for cars, vans, and trucks, this analysis focuses exclusively on new urban buses.[12]

During the initial 2021–2025 period, the directive assigned each Member State two distinct targets for the procurement of clean buses over 5 tonnes with more than eight seats: a clean vehicle (CV) target and a zero-emission vehicle (ZEV) target set at half of the CV value.[13] For example, Germany had a CV target of 45% over 2021–2025, necessitating that 45% of publicly procured buses be CVs while 22.5% be ZEVs. During this initial period, just 15 of the 27 EU Member States achieved their CV target but 18 achieved their ZEV target.

With the first reporting period concluding and a formal review scheduled for 2027 to define post-2030 goals, this spotlight analyzes how Member States adapted to targets over 2021–2025 and whether their trajectories align with upcoming, stricter requirements. According to our analysis, the first reporting period saw Member State responses that fell into three categories: established frontrunners, core markets managing high volumes, and late accelerators.

Figure 5.1

EU Member State compliance with Clean Vehicle Directive bus targets, 2021–2025



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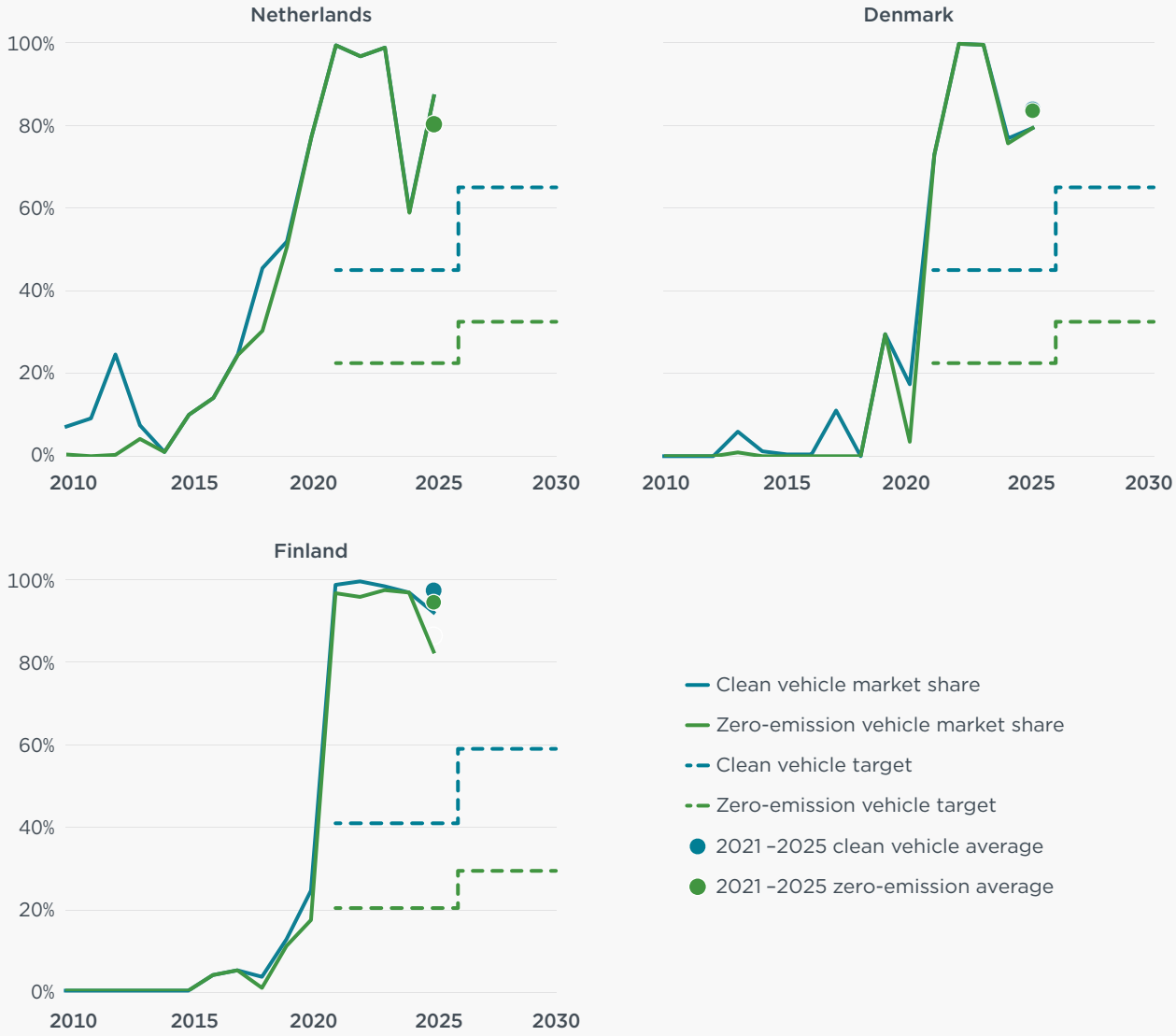
THE FRONTRUNNERS: EARLY ELECTRIFICATION

Northern European Member States had already begun the shift to electric buses in advance of CVD enforcement. The Netherlands has steadily increased its ZE fleet since 2014, recording above an 80% CV share (made up almost exclusively of ZEVs), against its 45% CV and 22.5% ZEV targets. Denmark and Finland achieved rapid uptake within 5 years: Denmark reached a 84% CV and ZEV share against a 43% target, while Finland registered a 97% CV share and 94% ZEV share, far exceeding its CV target of 43% and ZEV target of 21.5%.

Figure 5.2

Compliance with Clean Vehicle Directive bus targets in the Netherlands, Denmark, and Finland, 2021–2025



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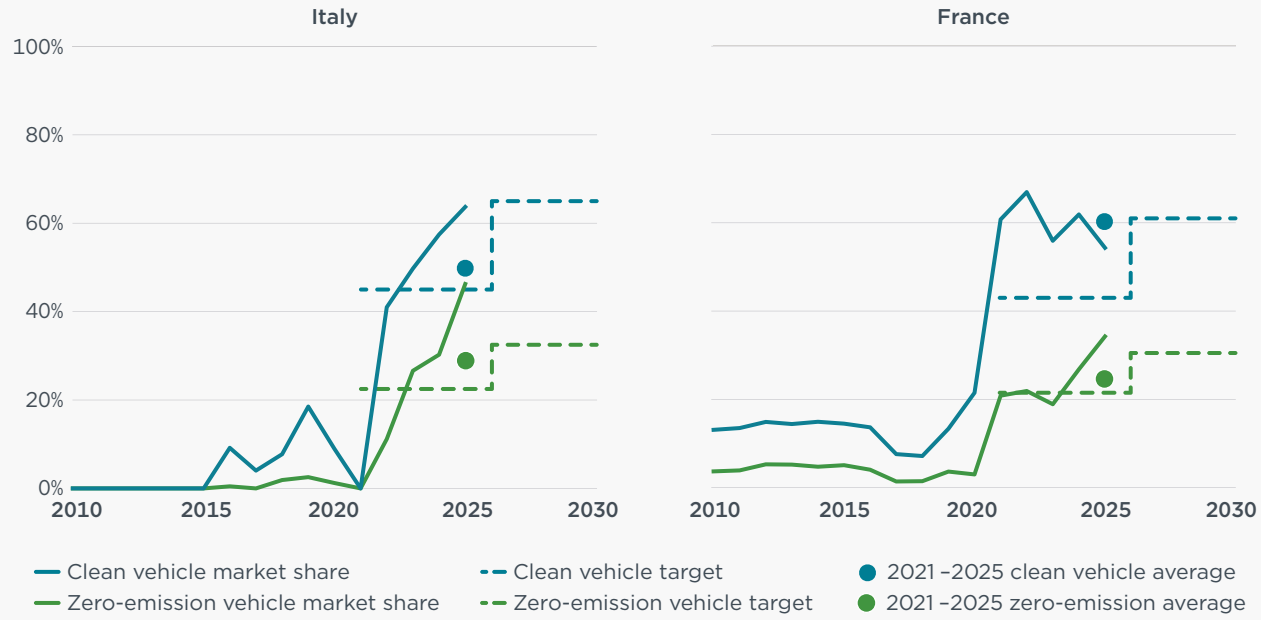
CORE MARKETS: MANAGING HIGH-VOLUME TRANSITIONS

Two of Europe's largest economies—Italy and France—faced strategic challenges due to massive procurement volumes. Italy demonstrated successful compliance, maintaining consistent uptake since 2020 to reach 50% CV and 29% ZEV shares, comfortably passing its 45% CV and 22.5% ZEV targets. Conversely, amid its historical reliance on biogas, France recorded a 60% CV share against a 43% target, but with minimal initial ZEV registrations. Following a pivot toward electrification, France reached a 25% ZEV share in 2025, just meeting its 21% ZEV target.

Figure 5.3

Compliance with Clean Vehicle Directive bus targets in Italy and France, 2021–2025



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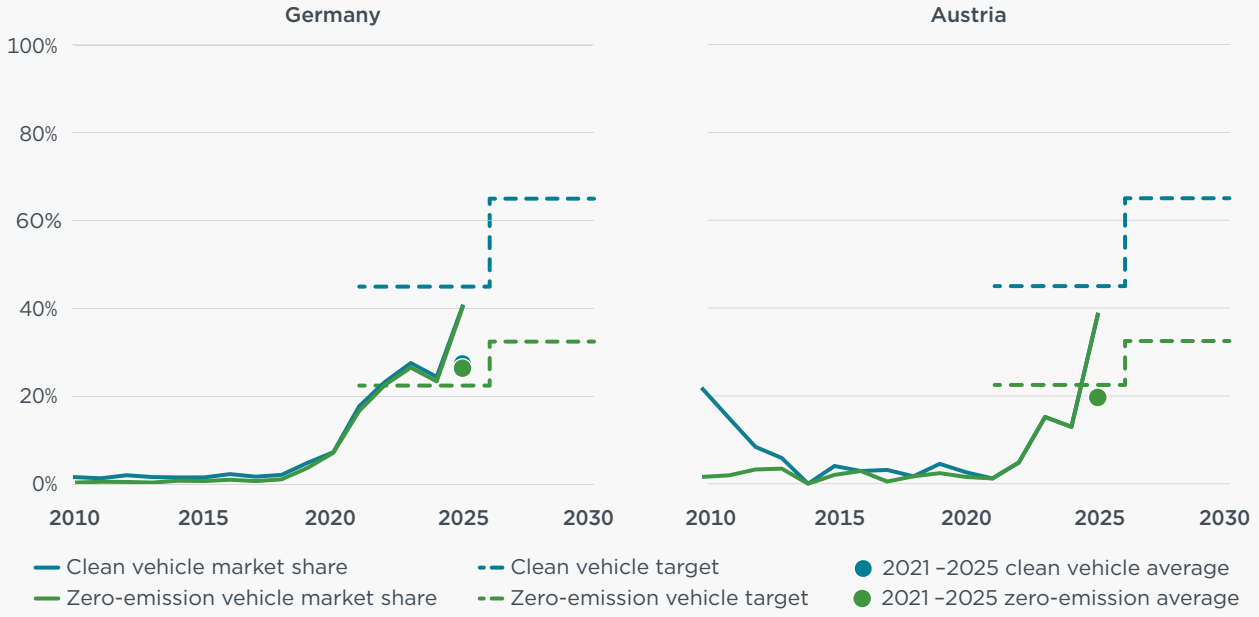
LATE ACCELERATORS: DELAYED START, FAST PACE

A final group of countries accelerated adoption following the enforcement of the CVD but started too late to achieve full compliance in the first reporting period. Germany followed a slow but consistent trajectory: ZEVs reached 26% of total sales compared with 27% for CVs. While this was sufficient to comply with its 22.5% ZEV target, it was insufficient to meet its 45% CV target.

Similarly, Austria delayed significant ZEV uptake until after 2022. Despite a rapid acceleration (reaching a 39% ZEV share in 2025), Austria missed both of its targets for the 2021–2025 period, achieving only a 18% CV and ZEV share against its 45% CV and 22.5% ZEV targets. However, if Austria maintains its current uptake rate, it is well positioned to meet the requirements for the second reporting period.

Stricter procurement targets in the second reporting period (2026–2030) represent a significant elevation in regulatory ambition. The conclusion of the second phase in 2030 aligns with the effective date of targets in the EU's CO_2 standards for HDVs, under which ZEVs must comprise 90% of a manufacturer's new urban bus sales by 2030 before ramping up to 100% by 2035. Current trajectories suggest that Member States are on track to meet these targets; several Member States, such as the Netherlands, Finland, and Denmark, are already compliant with these stricter upcoming requirements. Large markets like France and Italy are similarly positioned to meet their upcoming targets, because their recent ZEV uptake rates align with the projected mandates.

Figure 5.4
Compliance with Clean Vehicle Directive bus targets in Germany and Austria, 2021–2025



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DEFINITIONS, DATA SOURCES, METHODOLOGY, AND ASSUMPTIONS

A **zero-emission vehicle** is any vehicle whose propulsion system produces zero combustion emissions, including vehicles with a dedicated battery electric, fuel-cell electric, or other motor that is not driven by combustion.

A **heavy-duty vehicle** is a commercial vehicle intended for the transport of passengers or freight with a gross vehicle weight above 3.5 tonnes.

A **heavy truck** is a truck with a gross vehicle weight above 12 tonnes.

A **medium truck** is a truck with a gross vehicle weight between 3.5 and 12 tonnes.

A **medium van** is a van with a gross vehicle weight between 3.5 and 12 tonnes.

A **city bus** is a passenger vehicle used exclusively in urban environments with a gross vehicle weight above 7.5 tonnes.

An **inter-urban bus** is a passenger vehicle with a gross vehicle weight above 7.5 tonnes that is used in both urban and regional environments.

A **coach** is a passenger vehicle used exclusively in regional environments with a gross vehicle weight above 3.5 tonnes.

A **minibus** is a passenger vehicle with a gross vehicle weight between 3.5 and 7.5 tonnes.

For Europe and all EU mentions, data were supplied by Dataforce and cover all EU-27 countries, except for Malta.

ENDNOTES

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11 A clean heavy-duty vehicle is defined as a truck or bus using hydrogen, battery electric, PHEV, natural gas, liquid biofuels, synthetic and paraffinic fuels, or LPG.
12 We assumed that all urban bus registrations represent public procurement—a methodological assumption that cannot be reliably applied to other vehicle categories where public and private purchases are difficult to differentiate.
13 ZEVs are defined as either battery electric or fuel-cell electric vehicles.

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