



11 SEPTEMBER 2025

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

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

- Trucks (except light trucks, N1 category) including special-purpose vehicles – 4 830 units in August 2025, down 56.4% YOY; 38 761 units in January-August 2025, down 53.9% YOY.
- Buses and coaches (except minibuses, M2 category) – 939 units in August 2025, down 26.1% YOY; 6 003 units in January-August 2025, down 54.4% YOY.
Among them – electric buses: 54 units in August 2025, down 36.5% YOY; 236 units in January-August 2025, down 63.8% 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 analytic company, monthly sales of trucks including special-purpose vehicles in August 2025 continued the downturn and declined by 56% year-over-year to 4 830 units. The year-to-date sales of new trucks fell by 54% to 38 761 vehicles.

The second half of 2025 shows a slight growth of sales, and we hope to see a continuing trend of sales growth. Sales of foreign-branded trucks in the first eight months of 2025 showed a decline by 64% (to 22 203 units) as compared with January-August 2024, while sales of domestically branded new trucks lost only 25 percent (to 16 558 units). The share of foreign brands in January-August 2025 was 57% of the new truck market. KAMAZ was the best-selling brand in January-August 2025 (11 291 sales, down 22.5%), the result being 2.4 times better than the sales of SITRAK, the second best-selling brand with 4 736 trucks sold (down 66%). The share of KAMAZ brand is 29% of the market, the best-selling model being KAMAZ 43118 (6X6), with 2 827 trucks sold (down 7%).

In August 2025, the bus sales grew by 6% over the result of July 2025, and we hope that the growth of bus sales will continue in the second half of the year. The total bus sales in January-August 2025 were 6 003 vehicles, down 54.4% YOY. Sales of domestic brands in January-August 2025 fell by 56% to 4 525 buses, while sales of foreign brands lost 48% to show 1 478 buses. The share of domestic brands in the first eight months of 2025 was 75% of the new bus market. The best-selling bus brand in the first eight months of 2025 is PAZ with 2 878 vehicles sold (down 47%), gaining a 48% market share. The best-selling bus model is PAZ 3205 (955 units). Sales of electric buses in January-August 2025 fell by 63.8% to 236 vehicles.

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TRUCKS

Sales of new trucks in Russia in August and 8 months 2025 by brand, inclusive of special-purpose vehicles

Brand	August 2025	August 2024	8 months 2025	8 months 2024	Change August 2025 vs 2024, %	Change 8 months 2025 vs 2024, %
KAMAZ	1 465	1 689	11 291	14 573	-13,3	-22,5
SITRAK	380	1 733	4 736	13 815	-78,1	-65,7
GAZ	350	562	3 128	4 884	-37,7	-36,0
SHAANXI	573	1 574	2 859	10 544	-63,6	-72,9
FAW	251	920	2 575	8 025	-72,7	-67,9
MAZ	210	428	2 029	3 759	-50,9	-46,0
DONGFENG	133	1 037	1 598	6 164	-87,2	-74,1
URAL	148	178	1 562	2 174	-16,9	-28,2
HOWO	280	755	1 511	4 162	-62,9	-63,7
ISUZU	240	245	1 461	1 202	-2,0	21,5
JAC	130	369	1 289	2 820	-64,8	-54,3
FOTON	114	382	1 080	2 847	-70,2	-62,1
SANY	145	266	728	1 849	-45,5	-60,6
ZOOMLION	65	134	401	808	-51,5	-50,4
XU GONG	27	70	331	470	-61,4	-29,6
VALDAI	27	104	305	282	-74,0	8,2
VOLVO	22	75	250	625	-70,7	-60,0
AMT	53	16	234	203	231,2	15,3
MERCEDES	31	131	219	1 837	-76,3	-88,1
MAZ MAN	17	11	177	33	54,5	436,4
SCANIA	13	44	119	288	-70,5	-58,7
CHENGLONG	34	8	91	10	325,0	810,0
HONGYAN	5	94	90	593	-94,7	-84,8
LIUGONG	28	12	88	45	133,3	95,6
HYUNDAI	10	9	75	130	11,1	-42,3
JMC	5	57	75	100	-91,2	-25,0
MAN	8	37	63	337	-78,4	-81,3
DAEWOO	4	25	60	248	-84,0	-75,8
SHANQI	8	0	58	0		
DAYUN	13	13	51	173	0,0	-70,5
FUSO	1	4	37	47	-75,0	-21,3
BEIBEN	16	18	32	119	-11,1	-73,1
DAF	0	36	32	296	-100,0	-89,2
AMUR	5	0	25	2		1 150,0
HINO	3	17	19	157	-82,4	-87,9
FORD	0	3	14	34	-100,0	-58,8
BEIFANG BENCHI	4	3	11	84	33,3	-86,9
NEMO	1	0	10	0		
CAMC	3	1	9	2	200,0	350,0
IVECO	0	0	6	12		-50,0
NEFAZ	1	0	5	11		-54,5
RENAULT	0	0	4	26		-84,6



TRUCKS

Brand	August 2025	August 2024	8 months 2025	8 months 2024	Change August 2025 vs 2024, %	Change 8 months 2025 vs 2024, %
MZKT	0	2	3	15	-100,0	-80,0
SDAC	0	8	3	22	-100,0	-86,4
ZIL	0	1	3	58	-100,0	-94,8
AMBERTRUCK	1	0	2	0		
LIEBHERR	0	0	2	0		
LOTOS	1	0	2	0		
BAW	1	0	1	7		-85,7
CHENGLIWEI	0	2	1	16	-100,0	-93,8
DS DESA	1	0	1	0		
GREEN	0	0	1	0		
KAMAG	0	0	1	0		
SKYWELL	1	0	1	0		
SOLLERS	1	0	1	0		
WANSHAN	1	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
HUBEU	0	0	0	1		-100,0
JINBEI	0	0	0	2		-100,0
KERUI	0	1	0	13	-100,0	-100,0
KOLUMAN	0	0	0	1		-100,0
LANDWIND JIANGLING - JMC	0	0	0	1		-100,0
QINGLING	0	0	0	11		-100,0
TATRA	0	0	0	4		-100,0
TOTAL	4 830	11 074	38 761	84 003	-56,4	-53,9
TOTAL Russian brands	2 052	2 550	16 558	22 187	-19,5	-25,4
TOTAL foreign brands	2 778	8 524	22 203	61 816	-67,4	-64,1

Sales of new trucks in Russia in August and 8 months 2025 by type

Type	August 2025	August 2024	8 months 2025	8 months 2024	Market share August 2025, %	Market share August 2024, %	Market share 8 months 2025, %	Market share 8 months 2024, %
Other special equipment	2 498	4 095	20 586	30 498	51,7	37,0	53,1	36,3
Truck-tractor	632	2 675	5 922	22 269	13,1	24,2	15,3	26,5
Other truck types	522	1 341	3 834	10 681	10,8	12,1	9,9	12,7
Dump truck	313	710	2 677	6 072	6,5	6,4	6,9	7,2
Drop-side flat bed	340	985	2 318	7 222	7,0	8,9	6,0	8,6
Refrigerator	173	364	1 166	2 272	3,6	3,3	3,0	2,7
Van	224	644	1 039	2 775	4,6	5,8	2,7	3,3
Autocrane	74	153	592	1 255	1,5	1,4	1,5	1,5
Tanker	38	73	416	702	0,8	0,7	1,1	0,8
Mobile repair shop	11	14	142	127	0,2	0,1	0,4	0,2
Refueler	5	19	65	120	0,1	0,2	0,2	0,1
Other	0	1	4	10	0,0	0,0	0,0	0,0
TOTAL	4 830	11 074	38 761	84 003	100,0	100,0	100,0	100,0



TRUCKS

Top 25 model ranking of new truck sales in Russia in August and 8 months 2025

Rank	Model	Brand	August 2025	August 2024	8 months 2025	8 months 2024	Change August 2025 vs 2024, %	Change 8 months 2025 vs 2024, %
1	43118 6X6	KAMAZ	322	283	2 827	3 050	13,8	-7,3
2	GAZON NEXT	GAZ	301	454	2 577	3 876	-33,7	-33,5
3	C7H 4X2	SITRAK	301	1 260	2 140	9 504	-76,1	-77,5
4	C7H 6X4	SITRAK	49	352	2 060	3 058	-86,1	-32,6
5	65115 6X4	KAMAZ	259	261	1 843	2 197	-0,8	-16,1
6	J6 6X4	FAW	186	431	1 556	3 398	-56,8	-54,2
7	5490 4X2	KAMAZ	157	289	1 369	2 452	-45,7	-44,2
8	SX 331 8X4	SHAANXI	256	555	1 217	3 499	-53,9	-65,2
9	4320 6X6	URAL	117	137	1 119	1 455	-14,6	-23,1
10	ELF	ISUZU	176	190	1 097	921	-7,4	19,1
11	6520 6X4	KAMAZ	128	62	805	761	106,5	5,8
12	DFH-SERIES	DONGFENG	2	773	757	4 155	-99,7	-81,8
13	KOMPAS 9 4X2	KAMAZ	76	39	666	635	94,9	4,9
14	53605 4X2	KAMAZ	171	60	626	532	185,0	17,7
15	T5G 4X2	HOWO	219	415	582	875	-47,2	-33,5
16	SX 425 6X4	SHAANXI	66	199	575	1 888	-66,8	-69,5
17	5340 4X2	MAZ	33	75	539	831	-56,0	-35,1
18	43253 4X2	KAMAZ	67	91	537	551	-26,4	-2,5
19	C7H 8X4	SITRAK	30	120	536	1 238	-75,0	-56,7
20	SX 418 4X2	SHAANXI	218	346	525	1 731	-37,0	-69,7
21	T5G 6X4	HOWO	10	149	492	923	-93,3	-46,7
22	J7 4X2	FAW	12	347	490	2 992	-96,5	-83,6
23	6312 6X4	MAZ	45	120	473	945	-62,5	-49,9
24	N120	JAC	26	8	446	348	225,0	28,2
25	OLLIN	FOTON	43	92	410	806	-53,3	-49,1

8 months 2025

KAMAZ 43118 6X6

2 827 units **-7,3%**

SITRAK C7H 4X2

2 140 units **-77,5%**

GAZ GAZON NEXT

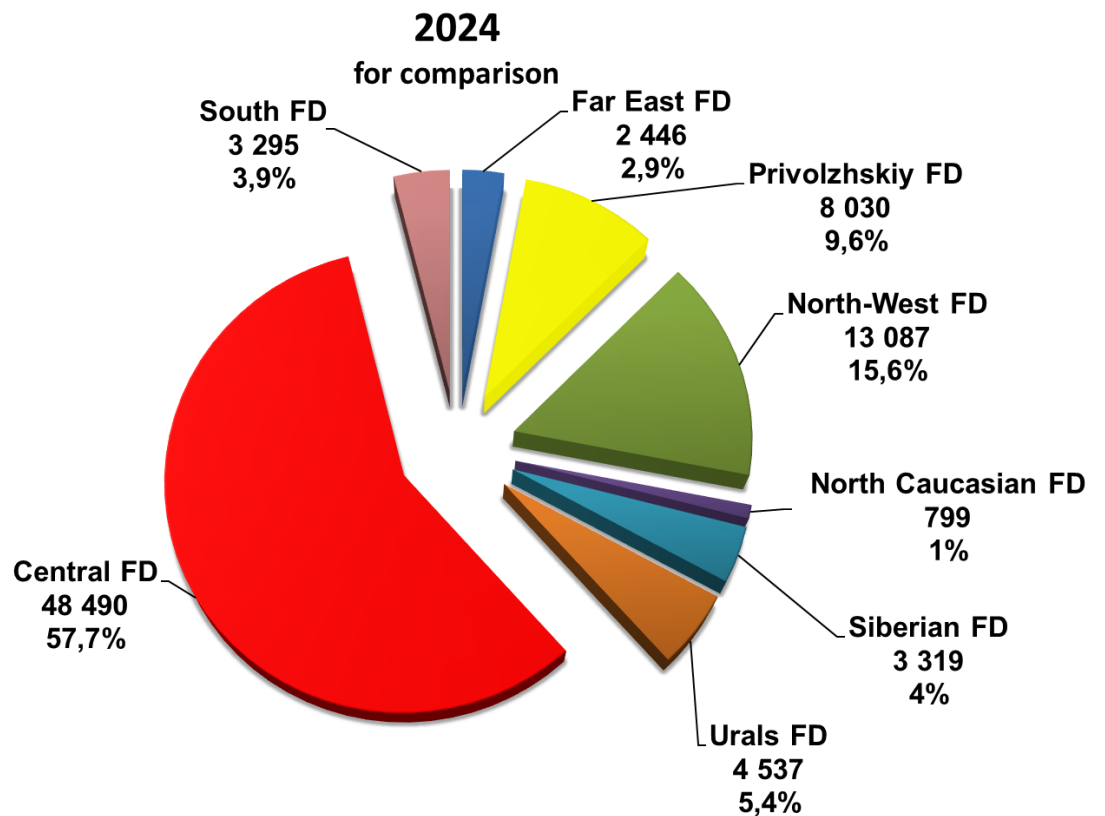
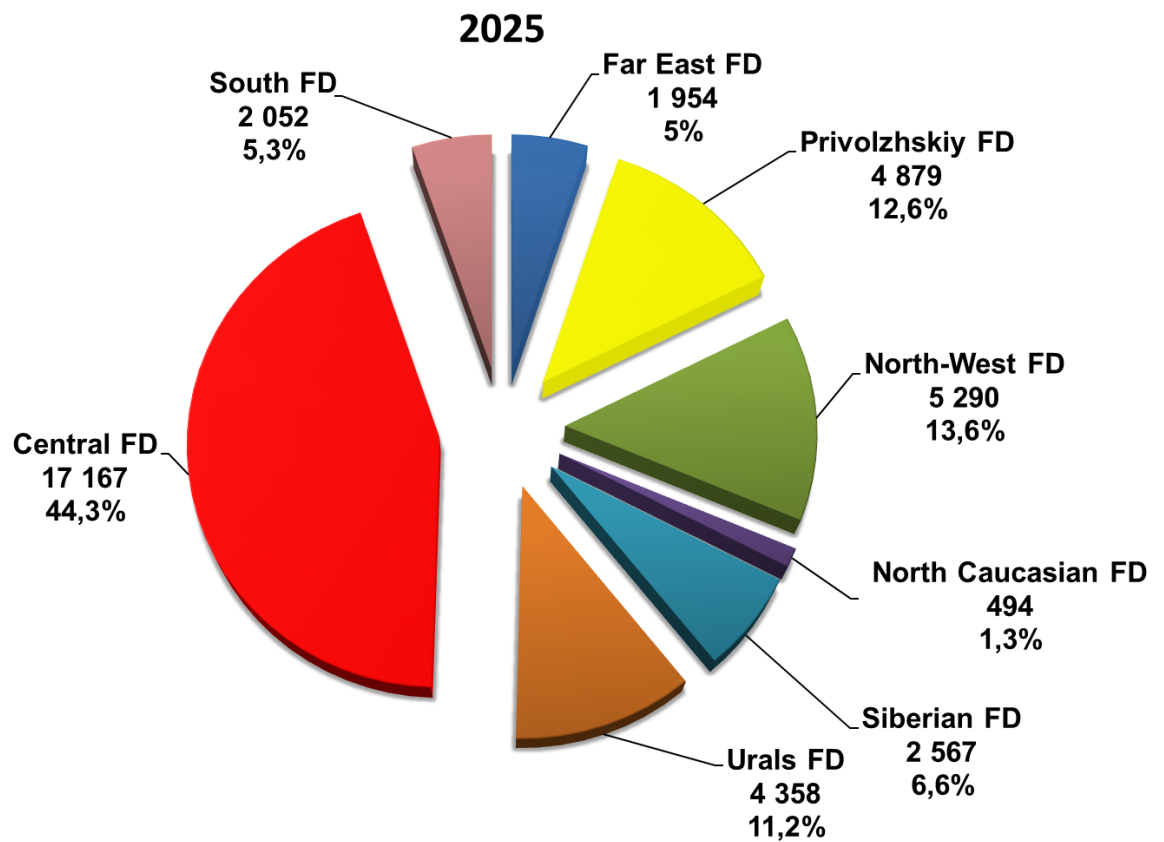
2 577 units **-33,5%**





TRUCKS

Structure of sales of new truck in Russia in 8 months 2025 by Federal District





BUSES

Sales of new buses in Russia in August and 8 months 2025 by brand

Brand	August 2025	August 2024	8 months 2025	8 months 2024	Change August 2025 vs 2024, %	Change 8 months 2025 vs 2024, %
PAZ	480	485	2 878	5 453	-1,0	-47,2
YUTONG	135	191	820	1 541	-29,3	-46,8
LIAZ	25	124	439	1 909	-79,8	-77,0
NEFAZ	48	169	360	1 223	-71,6	-70,6
KAVZ	52	15	278	411	246,7	-32,4
HIGER	49	62	277	441	-21,0	-37,2
KAMAZ	56	43	236	385	30,2	-38,7
VOLGABUS	20	27	217	509	-25,9	-57,4
MAZ	28	5	162	327	460,0	-50,5
GOLDEN DRAGON	7	22	80	134	-68,2	-40,3
ZHONGTONG	6	19	75	198	-68,4	-62,1
SIMAZ	0	19	42	158	-100,0	-73,4
URAL	9	2	37	93	350,0	-60,2
BMZ	0	0	21	1		2 000,0
KING LONG (KLM)	3	12	19	75	-75,0	-74,7
SAZ	14	0	14	25		-44,0
LOTOS	5	40	10	200	-87,5	-95,0
NEMAN	2	0	9	11		-18,2
ASIASTAR	0	0	8	2		300,0
AVIOR	0	0	5	0		
BZKT	0	0	4	1		300,0
ASIA	0	0	3	0		
FOTON	0	19	3	21	-100,0	-85,7
MAN	0	0	2	0		
SINARA	0	0	2	0		
JAC	0	0	1	30		-96,7
SOLLERS	0	0	1	0		
BKM	0	16	0	27	-100,0	-100,0
JIANLING	0	0	0	1		-100,0
SHENLONG	0	0	0	1		-100,0
TOYOTA	0	0	0	1		-100,0
TOTAL	939	1 270	6 003	13 178	-26,1	-54,4
TOTAL Russian brands	695	924	4 525	10 343	-24,8	-56,3
TOTAL foreign brands	244	346	1 478	2 835	-29,5	-47,9



BUSES

Sales of new electric buses in Russia in August and 8 months 2025 by brand

Brand / electric buses	August 2025	August 2024	8 months 2025	8 months 2024	Change August 2025 vs 2024, %	Change 8 months 2025 vs 2024, %
KAMAZ	54	43	195	385	25,6	-49,4
BMZ	0	0	21	1		2000,0
LIAZ	0	26	17	144	-100,0	-88,2
SINARA	0	0	2	0		
VOLGABUS	0	0	1	22		-95,5
NEFAZ	0	0	0	73		-100,0
BKM	0	16	0	27	-100,0	-100,0
TOTAL	54	85	236	652	-36,5	-63,8
TOTAL Russian brands	54	69	236	625	-21,7	-62,2
TOTAL foreign brands	0	16	0	27	-100,0	-100,0



BUSES

Top 25 model ranking of new bus sales in August and 8 months 2025

Rank	Model	Brand	August 2025	August 2024	8 months 2025	8 months 2024	Change August 2025 vs 2024, %	Change 8 months 2025 vs 2024, %
1	3205	PAZ	124	111	955	1 734	11,7	-44,9
2	VECTOR NEXT	PAZ	159	268	910	2 452	-40,7	-62,9
3	4234	PAZ	138	75	898	1 095	84,0	-18,0
4	6127	YUTONG	70	81	506	653	-13,6	-22,5
5	5299, 5297 4X2	NEFAZ, KAMAZ	44	153	339	1 099	-71,2	-69,2
6	CITYMAX 12	LIAZ	4	121	286	1 291	-96,7	-77,8
7	4238	KAVZ	41	13	232	216	215,4	7,4
8	203	MAZ	27	2	144	123	1 250,0	17,1
9	5222	KAMAZ	54	0	115	0		
10	KLQ-SERIES	HIGER	30	2	109	61	1 400,0	78,7
11	6899	YUTONG	24	36	109	159	-33,3	-31,4
12	KLQ 6129	HIGER	18	0	108	145		-25,5
13	CITYRITM 12	VOLGABUS	0	0	106	83		27,7
14	4292	LIAZ	0	3	91	200	-100,0	-54,5
15	6122	YUTONG	23	43	85	427	-46,5	-80,1
16	3204	PAZ	57	4	81	17	1 325,0	376,5
17	6282	KAMAZ	0	43	80	385	-100,0	-79,2
18	LCK-SERIES	ZHONGTONG	6	19	75	198	-68,4	-62,1
19	XML	GOLDEN DRAGON	4	13	67	105	-69,2	-36,2
20	6213	LIAZ	21	0	46	0		
21	4298	VOLGABUS	1	27	43	259	-96,3	-83,4
22	2258	SIMAZ	0	19	42	158	-100,0	-73,4
23	KLQ 6128	HIGER	1	13	39	107	-92,3	-63,6
24	4235	KAVZ	11	2	39	106	450,0	-63,2
25	3255 4320 6X6	URAL	9	2	37	93	350,0	-60,2

8 months 2025

PAZ 3205

955 units **-44,9%**

PAZ VECTOR NEXT

910 units **-62,9%**



PAZ 4234

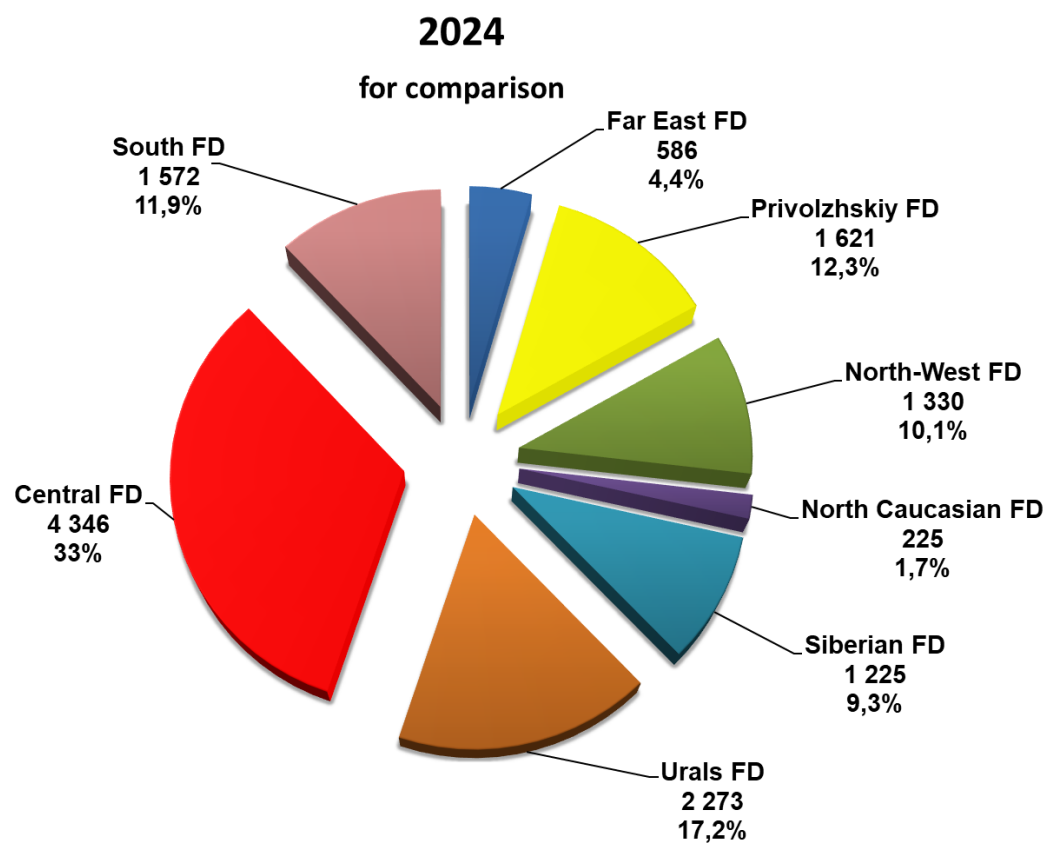
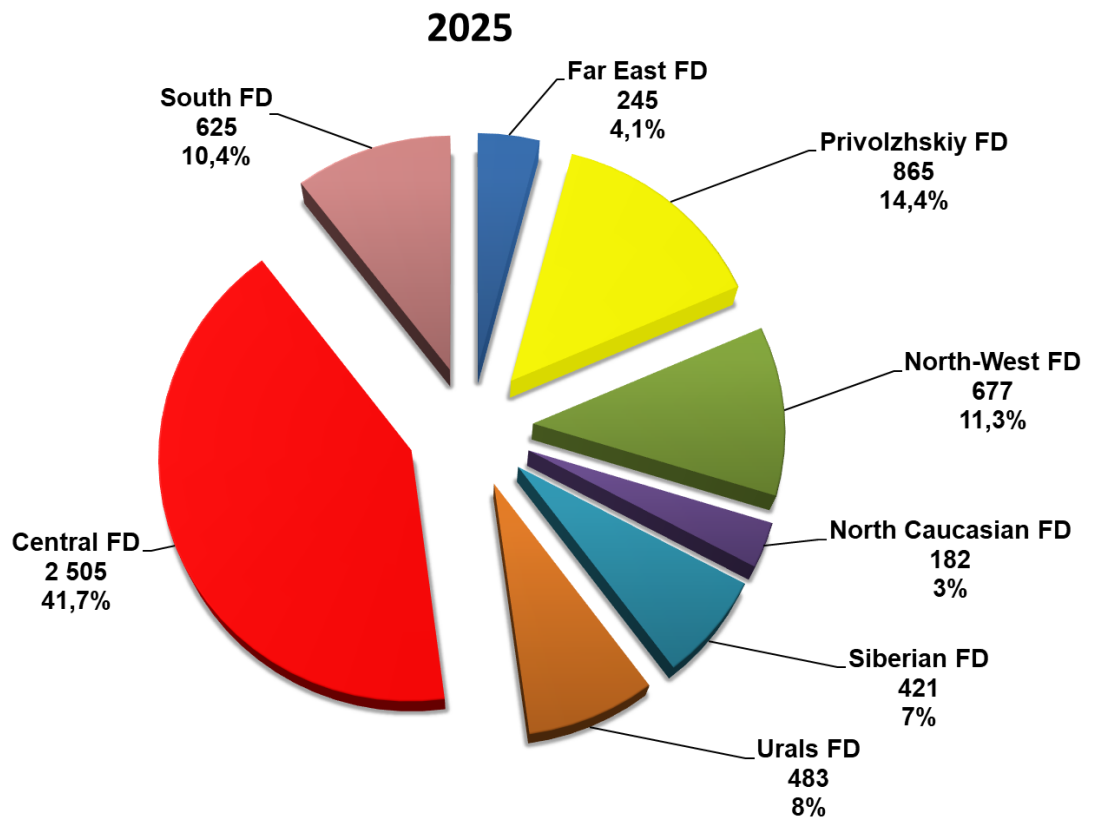
898 units **-18%**





BUSES

Structure of new bus sales in Russia in 8 months 2025 by Federal District



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