

ANNUAL REPORT 2025

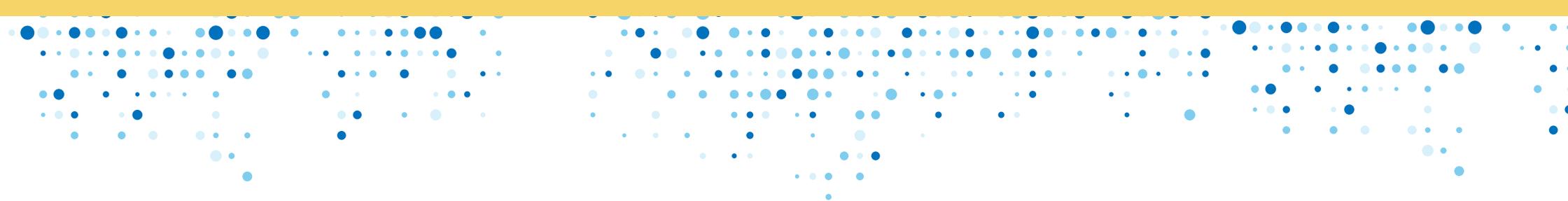


European Bus Data

**Annotated
Sample**

European Mini & Midibus Markets
>3,5 and <8 tonnes GVW

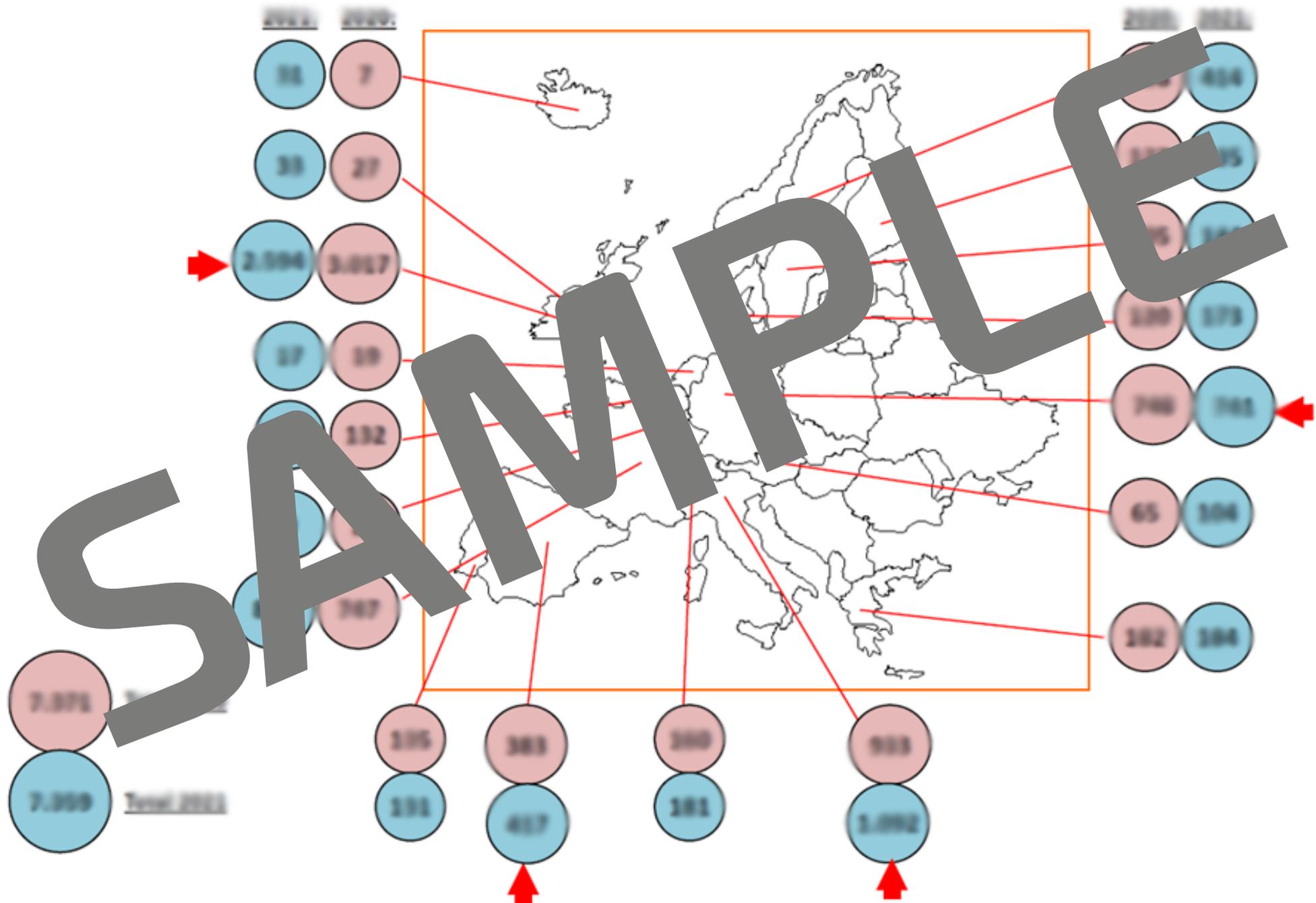




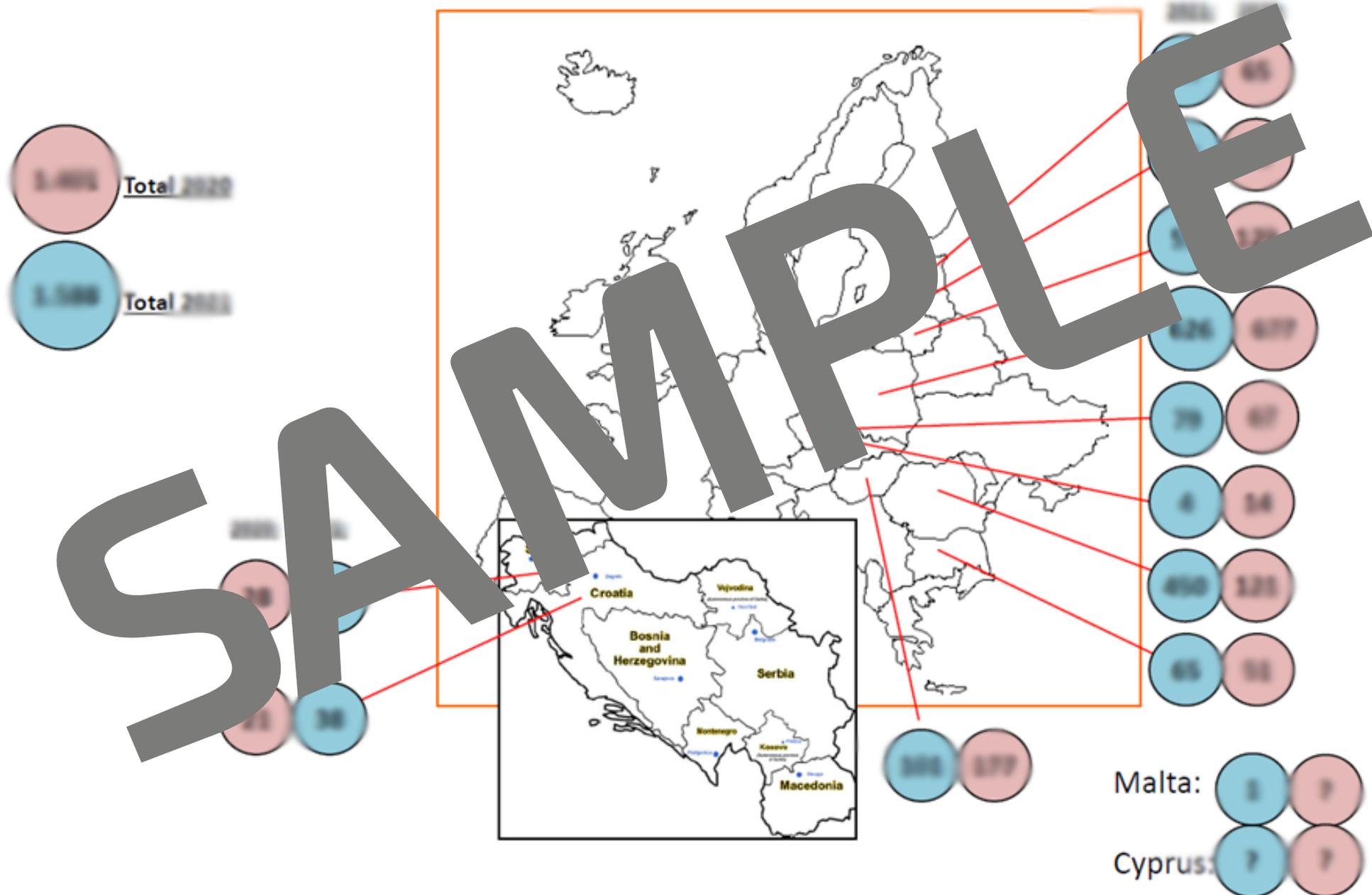
Western and Eastern European Markets in a Multi-Year Comparison

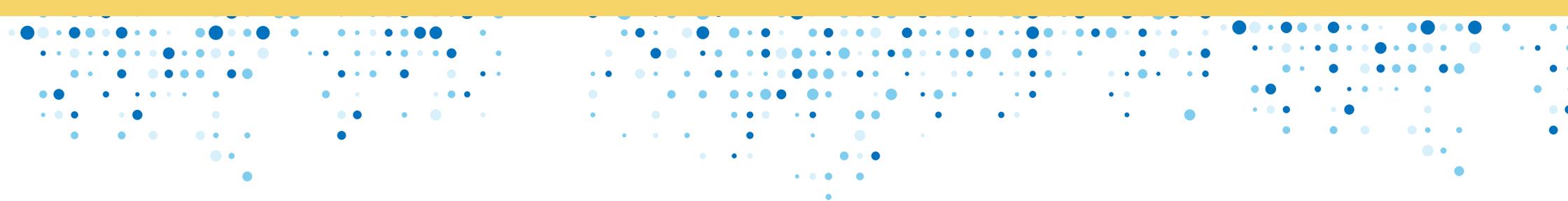
- Western-European markets: registrations Micro, Mini and Midi buses and coaches between 3,5-8t GVW, year-on-year comparison 2012-2025
- Western-European markets: registrations Micro, Mini and Midi buses and coaches between 3,5-6t GVW, year-on-year comparison 2012-2025
- Western-European markets: registrations Micro, Mini and Midi buses and coaches between 6-8t GVW, year-on-year comparison 2012-2025
- Eastern-European markets: registrations Micro, Mini and Midi buses and coaches between 3,5-8t GVW, year-on-year comparison 2020-2025

Western-European markets 2020 and 2021: registrations Micro, Mini and Midi buses and coaches between 3,5t - 8t GVW



Eastern-European markets 2020 and 2021: registrations Micro, Mini and Midi buses and coaches between 3,5t - 8t GVW





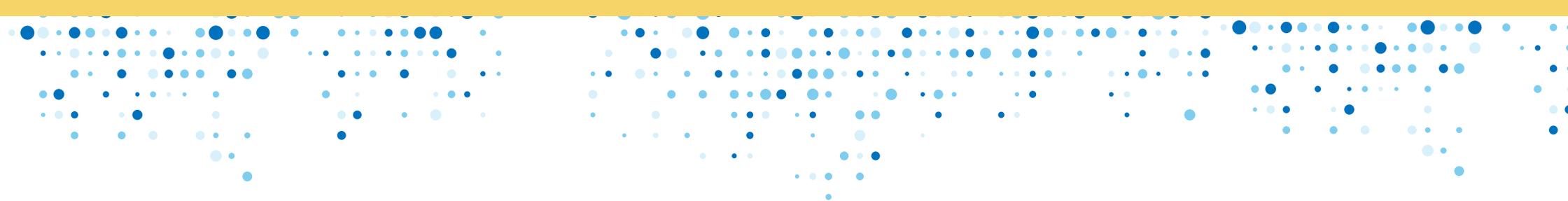
Market Overview: Micro, Mini & Midibuses 2024/2025

Western & Eastern Europe (3.5–<8t), by Manufacturer & Country

- Micro, Mini and Midibus Markets 2024 & 2025, Western-Europe, >3,5t-<8t, by manufacturer and country
- Micro, Mini and Midibus Markets 2024 & 2025, Western-Europe, >3,5t-<6t, by manufacturer and country
- Micro, Mini and Midibus Markets 2024 & 2025, Western-Europe, >6t-<8t, by manufacturer and country
- Micro, Mini and Midibus Markets 2024 & 2025, Eastern-Europe and Totals, >3,5t-<8t, by manufacturer and country

Micro, Mini and Midibus Markets 2024, Western-Europe, >3,5t - <8t

2024			Mercedes	Tremonia	MAN	VW	Iveco	Fiat	Citroen	Peugeot	Renault	Opel	Ford	VDL B&C	Karsan	Rosero	Alto	Bus	Feniks bus	Other	Total 2024
United Kingdom	>3,5t	<8t																			0
Italy	>3,5t	<8t	277		15	69	919	56		2		2	207		36					46	1.095
France	>3,5t	<8t	437				306				16		19		19					0	596
Germany	>3,5t	<8t	657		18	7	73		2	4											1.625
Spain	>3,5t	<8t	355		16		296	12			1		246								618
Norway	>3,5t	<8t	77	1	7	27	18				2		139				18			13	317
Portugal	>3,5t	<8t	63		4	3	101				25				1					8	133
Belgium	>3,5t	<8t	13	36	1								1		4				13	14	100
Denmark	>3,5t	<8t	108										1							1	140
Finland	>3,5t	<8t	105			1							15			2	19		6	20	206
Sweden	>3,5t	<8t	180				18						17				2				200
Greece	>3,5t		242				6						18		2						268
Switzerland	>3,5t	<8t	84		1		14				6		28				14	1		1	157
Austria	>3,5t	<8t	75		6		4						15							10	132
Netherlands	>3,5t	<8t	13														1			12	71
Ireland																					86
Iceland	>3,5t	<8t	0		1		18						13								30
Luxemburg	>3,5t	<8t	1																		8
Total 2024:			2.122	39	100	111	1.000	68	2	6	125	2	1.095	0	75	2	19	19	37	307	5.000
			41.0%	6.0%	1.7%	1.0%	18.1%	1.0%	0.0%	0.1%	1.0%	0.0%	17.3%	0.0%	1.1%	0.0%	0.4%	0.1%	0.7%	4.1%	100.0%

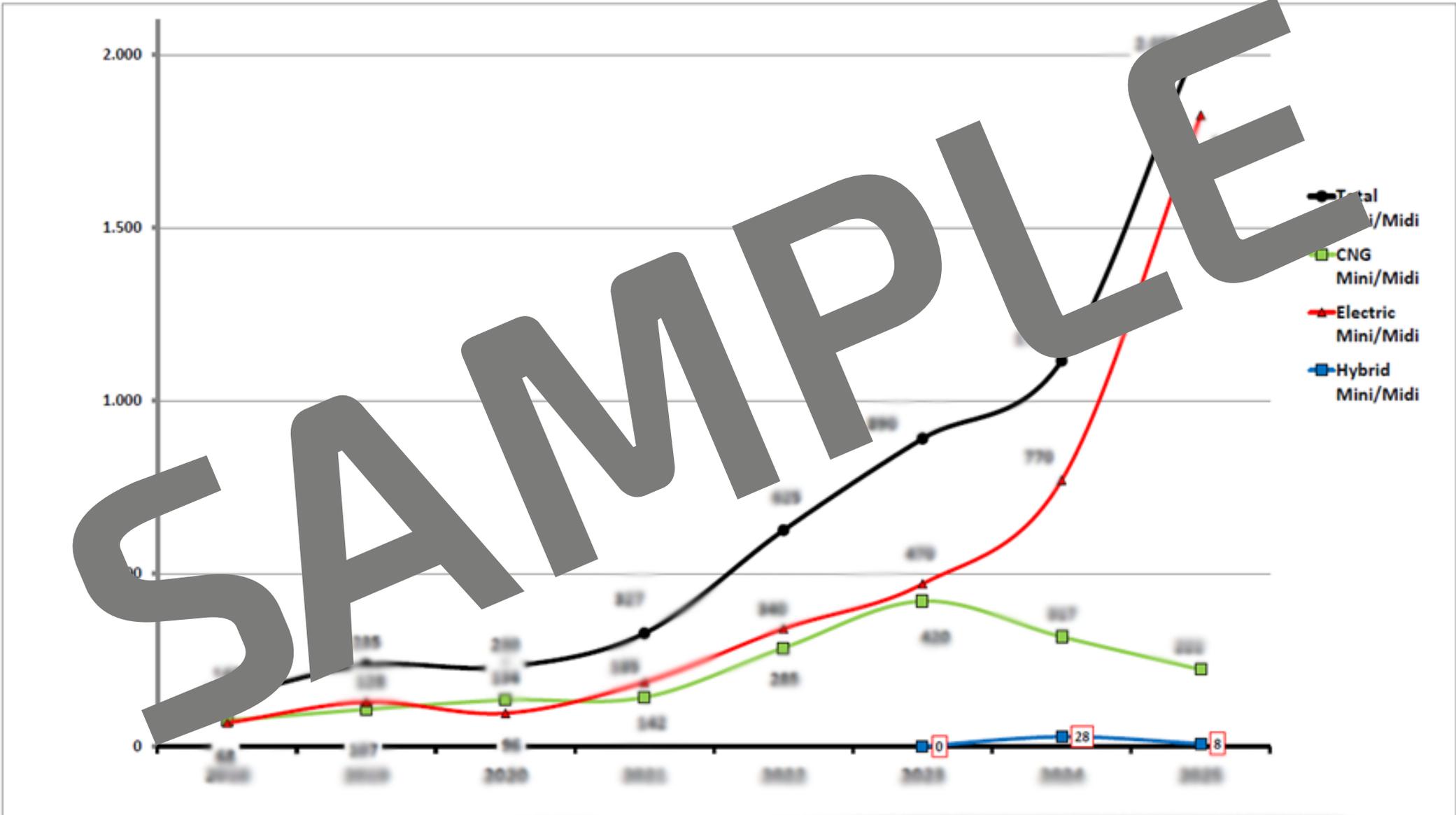


Development of Alternative Drivelines in Mini & Midibuses (GVW >3.5t–<8t), 2018–2025

- Development of Alternative Drivelines, Mini and Midibuses, GVW >3.5t-<8t
 - Years 2018-2019: Western-Europe + Poland /
Years 2020-2025: EU27+UK+ICE+NO+CH
 - Years 2018-2019: Western-Europe + Poland /
Years 2020-2025: EU27+UK+ICE+NO+CH
- Total number „alternative“-mini/midibuses, registered in 2024 & 2025 GVW: 3,5t-8t, by country and driveline
- Electric Mini/Midi buses GVW>3,5t and <8t, registered in 2025

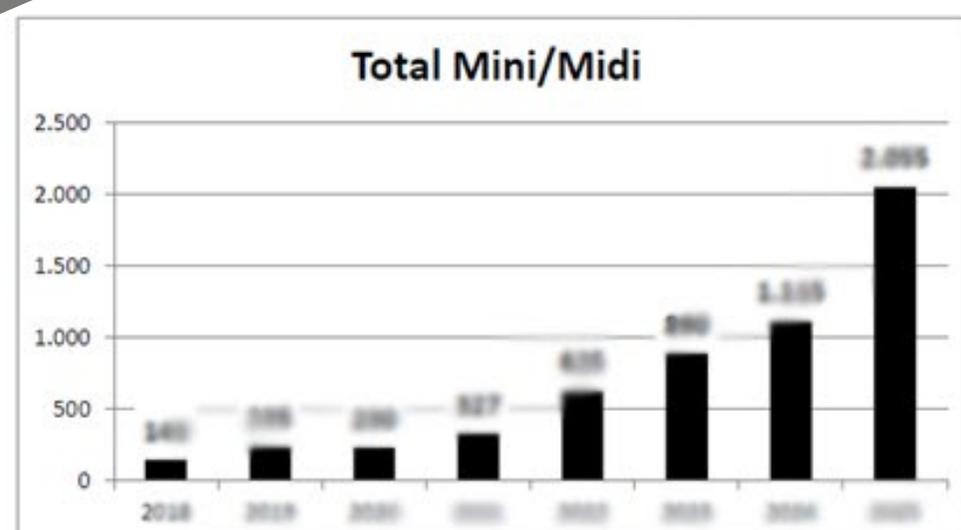
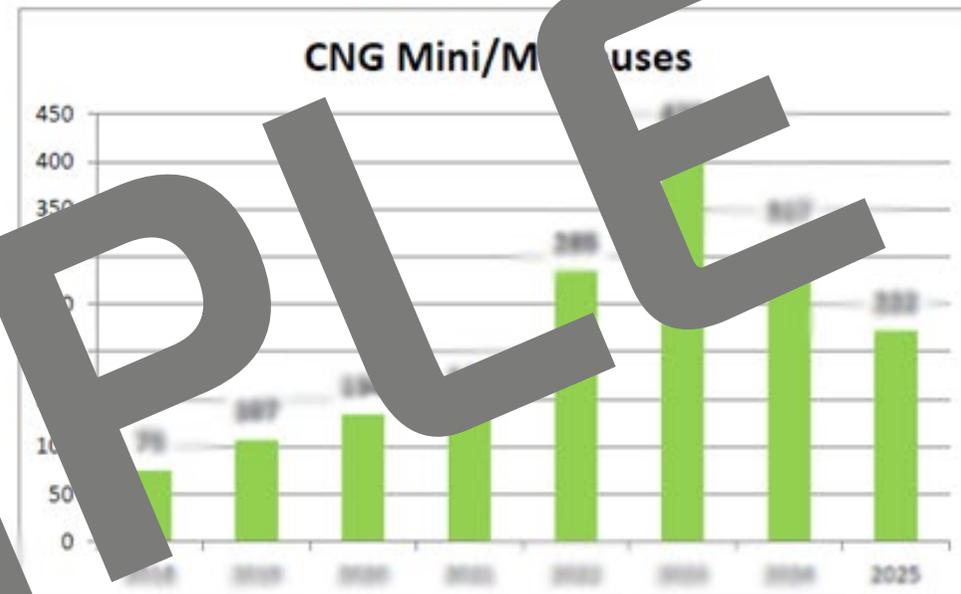
Development of Alternative Drivelines, Mini and Midibuses, GVW >3.5t-<8t

Years 2018-2019: Western-Europe + Poland / Years 2020-2025: EU27+UK+ICE+NO+CH



Development of Alternative Drivelines, Mini and Midibuses, GVW >3.5t-<8t

Years 2018-2019: Western-Europe + Poland / Years 2020-2025: EU27+UK+ICE+NO+CH



Total number "alternative"-mini/midibuses, registered in 2024

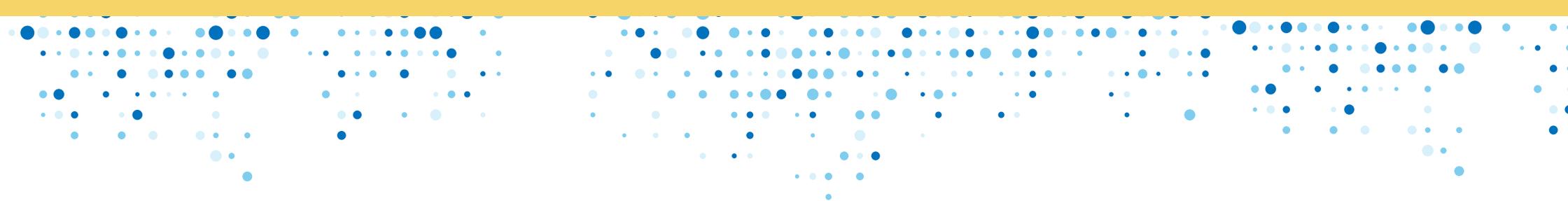
GVW: 3,5t - 8t

	Hybrid	Electric	CNG - NGT	Fuel Cell	total:
Germany		65	5		70
France		10	46		56
Italy	28	518	252		818
United Kingdom					
Spain		4			4
Sweden		13	5		18
Netherlands					
Belgium		7			7
Luxemburg					
Portugal		16			16
Austria					
Switzerland		15			15
Norway		97	4		101
Greece		5			5
Denmark		4			4
Ireland					
Finland		7			7
Iceland					
Estonia					7
Lithuania					26
Latvia					7
Poland		17	5		22
Czech Republic		5	26		31
Hungary					
Croatia					
Romania		102			102
Bulgaria		5			5
Slovenia		3			3
Total:	28	776	317		1121

2023:		676	438		1114
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Difference 2024-2023: 28 990 679 107

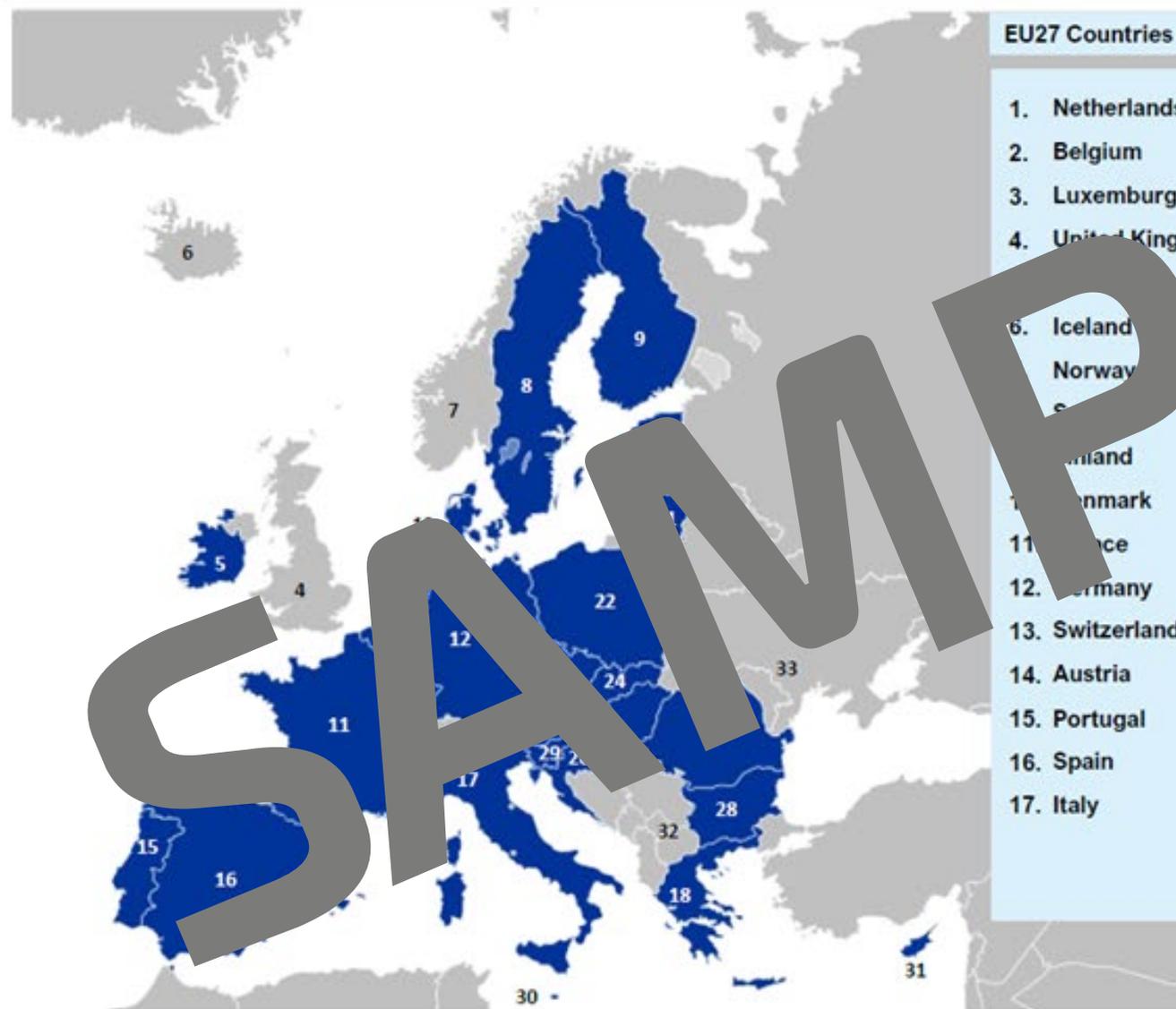
SAMPLE



Detailed country-by-country analysis

- Registrations by country and segment
- Visualised in charts (current and previous year)
- Supplementary tables included

Contents



EU27 Countries + UK + ICE + NO + CH + SRB + UA

1. Netherlands	18. Greece
2. Belgium	19. Estonia
3. Luxemburg	20. Latvia
4. United Kingdom	21. Lithuania
5. Ireland	22. Poland
6. Iceland	23. Czech Republic
7. Norway	24. Slovakia
8. Denmark	25. Hungary
9. Finland	26. Croatia
10. Denmark	27. Romania
11. France	28. Bulgaria
12. Germany	29. Slovenia
13. Switzerland	30. Malta*
14. Austria	31. Cyprus*
15. Portugal	32. Serbia NEW
16. Spain	33. Ukraine NEW
17. Italy	

* no data in 2025
 ** latest data: Q2 2025

Registrations 2024 and 2025, Finland - 1
 Mini and Midibus segments <8 t GVW
 Year to date: December



Total 2024: 298

Total 2025: 297 (+0.4%)

	2024	2025
AUTO	15	15
AUTOMET	10	10
AUTOMET	10	10
BUSCONCEPT	1	1
ESMERALDA	1	1
FENIKSUS	4	3
FERQUI	1	1
FORD	25	25
INDCAR	2	2
IVECO	1	1
MAN	1	1
MERCEDES	200	200
MERCUS	1	1
POLSTER	25	25
ZAK	4	11
Others	10	2
Total	298	297

2x ROSERO-P, 1x VOLKSWAGEN

1x CENTO BUS, 1x ROSERO - P

Contact

DVV Media Group GmbH
Mail: service@dvvmedia.com
Phone: +49 40 23714-240



For complementary datasets in Excel format, visit:
www.nana-online.de/european-bus-data



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