

2025
Quarterly Report
Q1

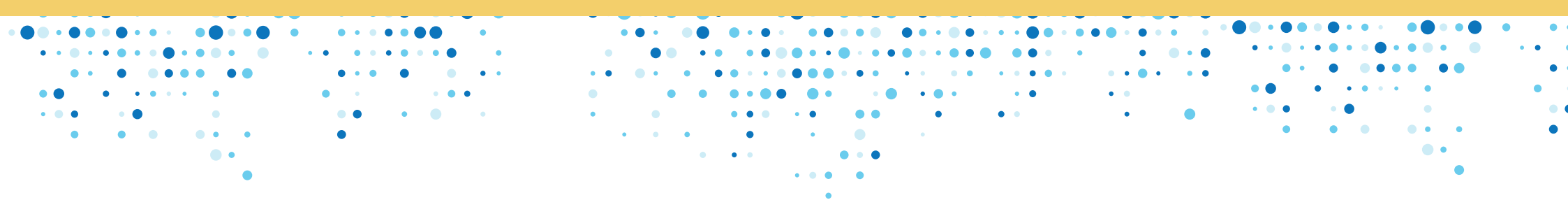
Alternative Drivelines



**Annotated
Sample**

**Alternative Drivelines
for City Buses
>8 tonnes GVW**





Development of Alternative Drivelines GVW >8t

Contents

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- Development of Alternative Drivelines, GVW >8t:
Years 2015-2019: Western-Europe + Poland /
Years 2020-Q1 2025: EU27+UK+ICE+NO+CH

Diagram

“Non-Diesel” Bus Registrations Q1/2025

- Total number registered in Q1/2025
- City buses, registered in Q1/2025 & Q1/2024
- Intercity buses, registered in Q1/2025 & Q1/2024

Table

Market Shares

- Development shares Q1/2022 to Q1/2025

Table

Development of Alternative Drivelines GVW >8t

Contents

Registrations Q1/2024 and Q1/2025 – total, > 8t GVW in EU27+UK+ICE+NO+CH per segment

- Hybrid, Hybrid City, and Hybrid Intercity Buses
- Electric, Electric City, and Electric Intercity Buses
- CNG/LNG, CNG/LNG City, and CNG/LNG Intercity Buses
- Fuel Cell and Fuel Cell City Buses

Electric Buses GVW >8t – total registrations

- In Q1/2025
- From 2013 up to and including Q1 2025

Hydrogen Buses GVW >8t – registrations

- In Q1/2025, by country & by manufacturer
- In 2025, total per country
- 2013 up to and including Q1 2025, total per year

Presentation

Diagram & table

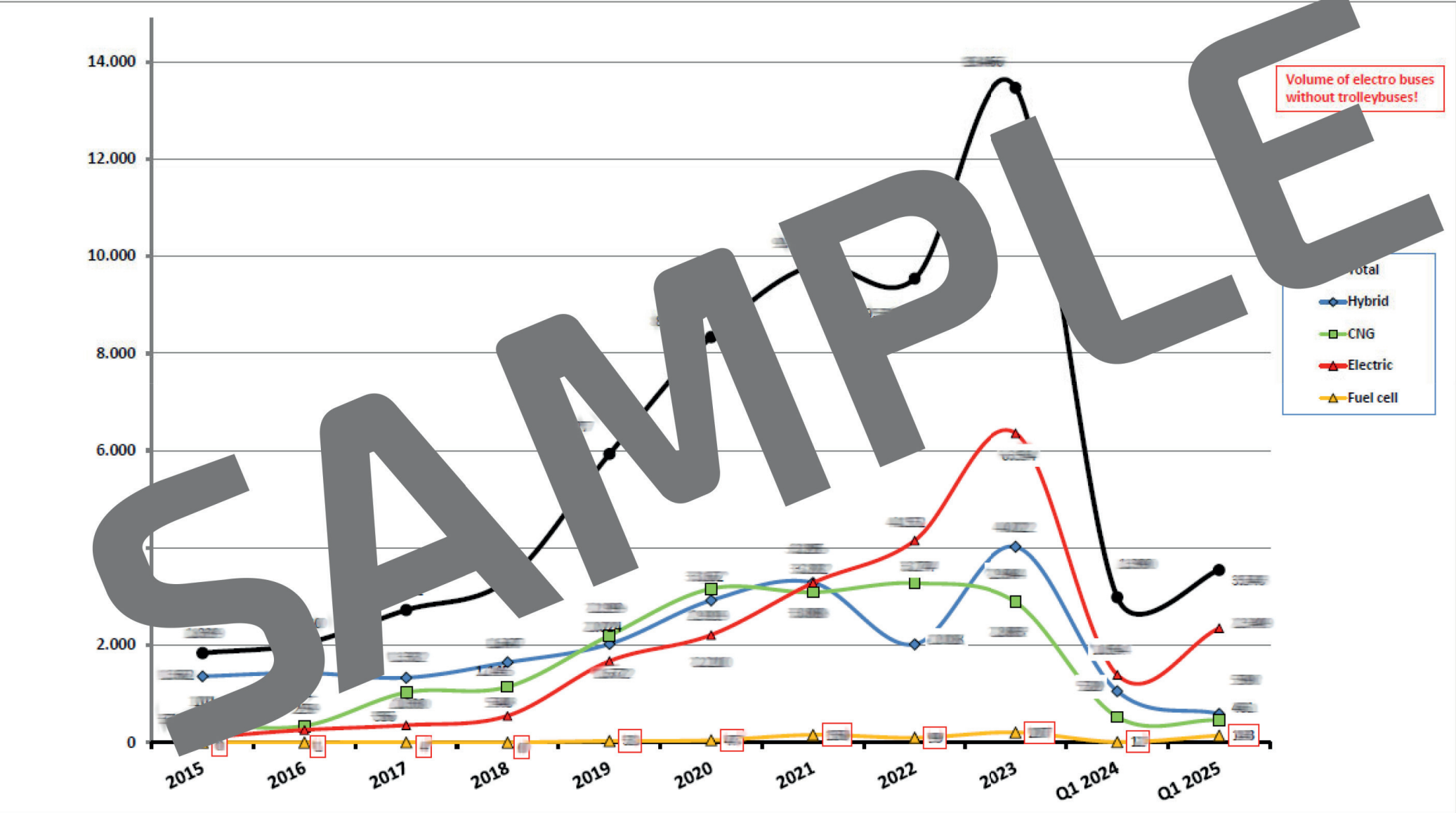
Diagram & table

Diagram & table

Development of Alternative Drivelines, GVW >8t



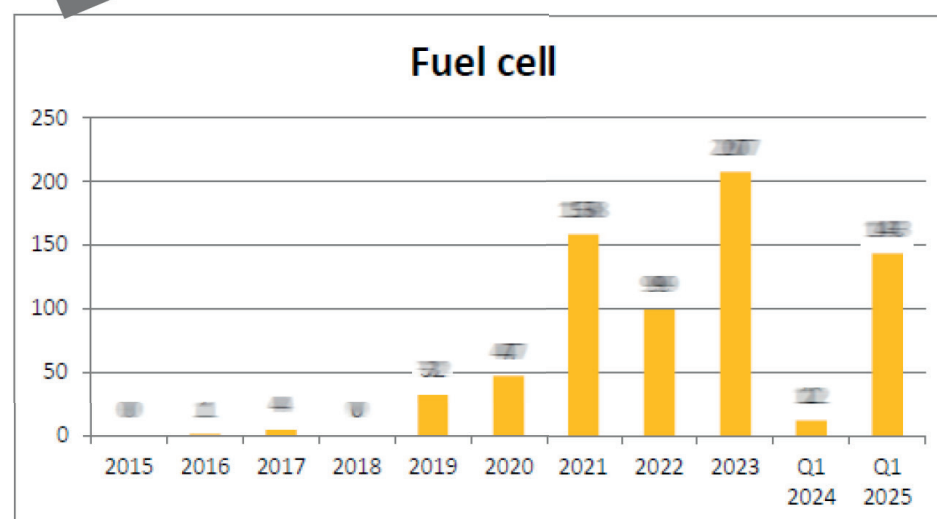
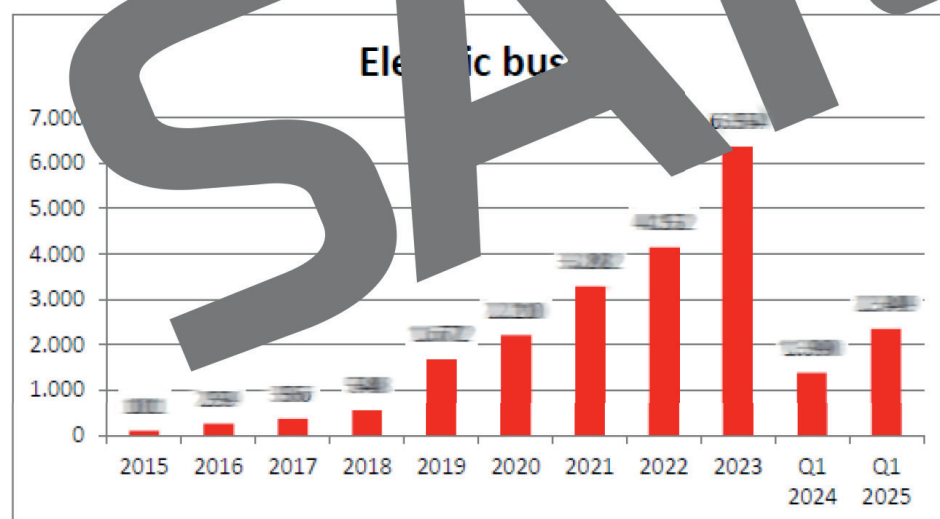
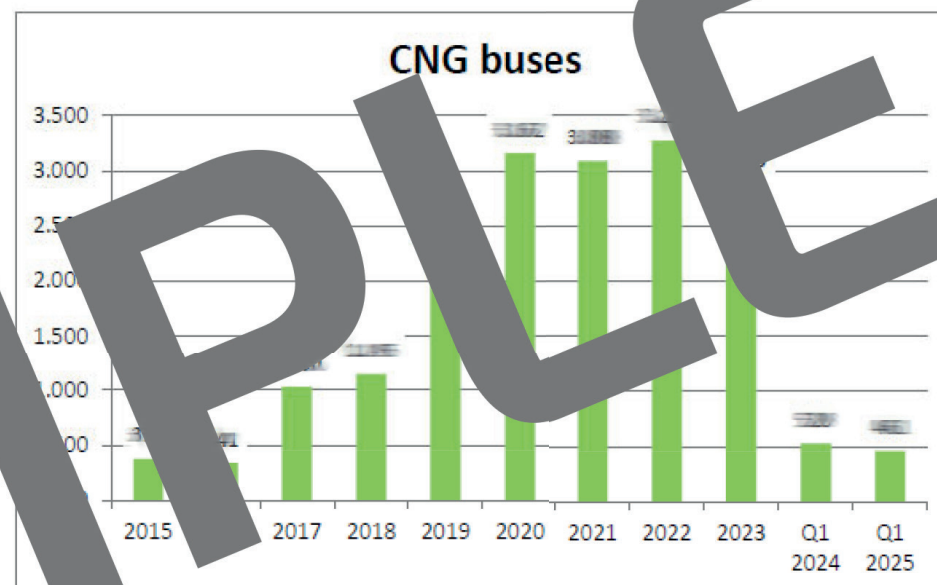
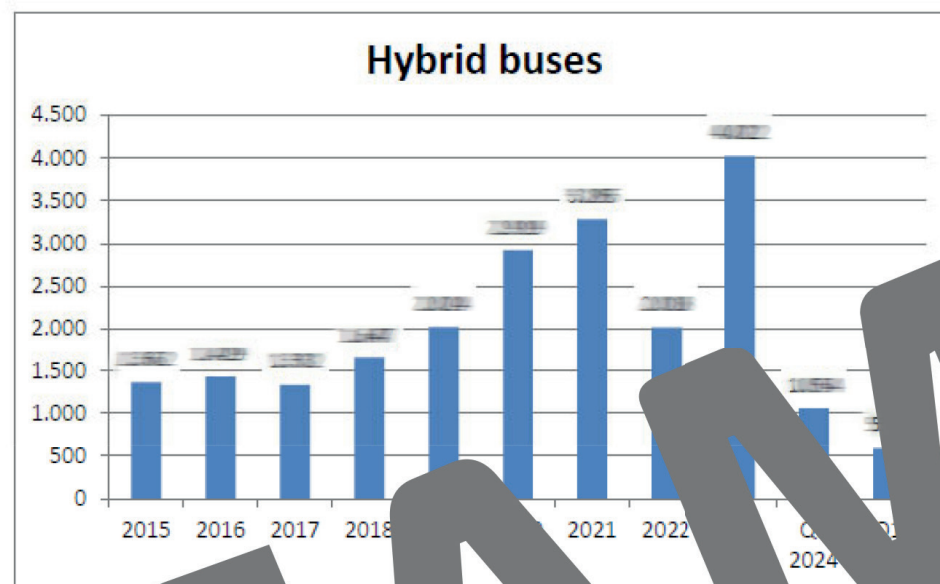
Years 2015-2019: Western-Europe + Poland / Years 2020-Q1 2025: EU27+UK+ICE+NO+CH



Development of Alternative Drivelines, GVW >8t



Years 2015-2019: Western-Europe + Poland / Years 2020-Q1 2025: EU27+UK+ICE+NO+CH



Volume of electric buses without trolleybuses

	Hybrid	Electric	CNG - NGT	Fuel Cell	total:
Germany	1550	2770	99	1200	5519
France	160	1009	1000		3609
Italy	1020	1007	2000	15	4042
United Kingdom		7000		105	7105
Spain	1000	100			1100
Sweden		1000			1000
Netherlands		1000			1000
Belgium	10	1000			1010
Luxemburg	15	100			115
Portugal		100			100
Austria	100	100			200
Switzerland	10	100			110
Norway		1000			1000
Greece		1000			1000
Denmark		100			100
Ireland		100			100
Finland		100			100
Iceland		100			100
Poland	100	100	100	100	400
Estonia		100			100
Lithuania		100			100
Latvia		100			100
Czech Republic	100	100	100		300
Slovakia		100			100
Hungary		100			100
Croatia		100			100
Romania	100	100			200
Bulgaria		100			100
Slovenia		100			100
Total:	5500	10000	4000	1000	20500

Excluding
56x Trolley
buses

Q1 2024	10000	10000	1000	100	20100
Difference Q1 2024 - Q1 2025	-4500	-9000	-400	-100	-15000

Development shares Alternative Drivelines Q1 2022 - Q1 2025

Countries: EU27+UK+ICE+NO+CH (without MT and CY)

Total number of city buses with alternative driveline, registered in Q1-2022:					
	Hybrid	Electric	CNG - NGT	Fuel Cell	total:
Total Q1-2022:	100	100	100	100	400
In other segments:	0	0	0	0	0
In city bus segment:	100	100	100	100	400
City bus market (excl. 27 trolleys)					
Share:	25%	25%	25%	25%	100%

Total number of city buses with alternative driveline, registered in Q1-2023:					
	Hybrid	Electric	CNG - NGT	Fuel Cell	total:
Total Q1-2023:	100	100	100	100	400
In other segments:	0	0	0	0	0
In city bus segment:	100	100	100	100	400
City bus market (excl. 15 trolleys)					
Share:	25%	25%	25%	25%	100%

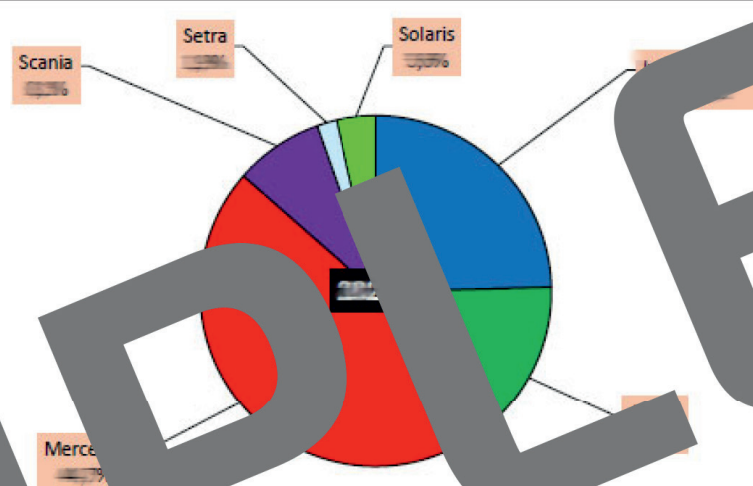
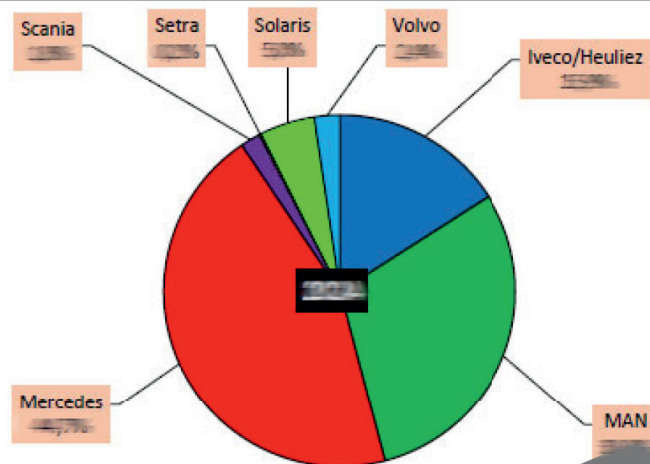
Total number of city buses with alternative driveline, registered in Q1-2024:					
	Hybrid	Electric	CNG - NGT	Fuel Cell	total:
Total Q1-2024:	100	100	100	100	400
In other segments:	0	0	0	0	0
In city bus segment:	100	100	100	100	400
City bus market (excl. 17 trolleys)					
Share:	25%	25%	25%	25%	100%

Total number of city buses with alternative driveline, registered in Q1-2025:					
	Hybrid	Electric	CNG - NGT	Fuel Cell	total:
Total Q1-2025:	100	100	100	100	400
In other segments:	0	0	0	0	0
In city bus segment:	100	100	100	100	400
City bus market (excl. 56 trolleys)					
Share:	25%	25%	25%	25%	100%

Registrations Q1 2024 and Q1 2025, Hybrid Buses in EU27+UK+ICE+NO+CH

Total, > 8t GVW

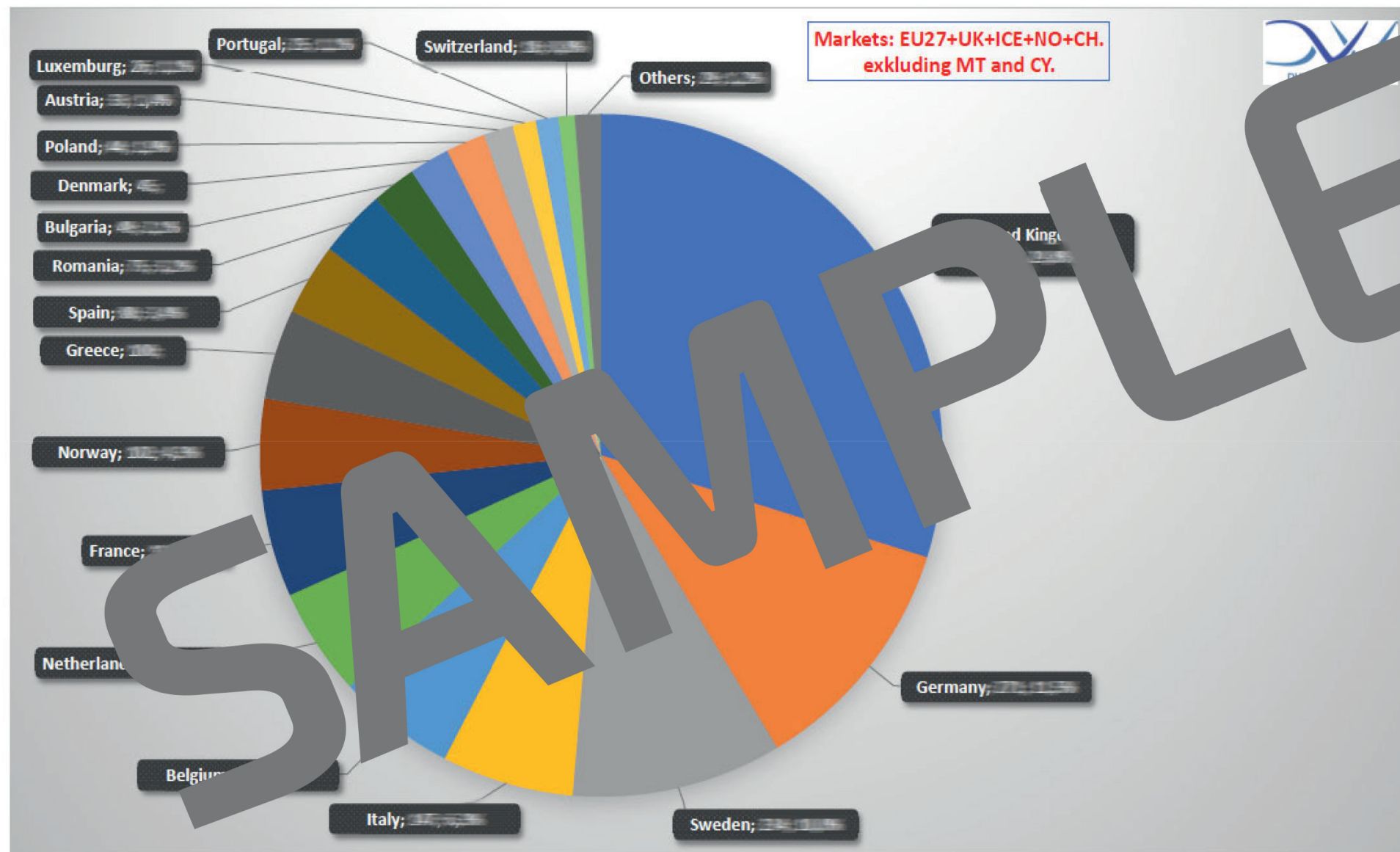
Year to date: March



Iveco/Heuliez		
MAN		
Mercedes		
Scania		
Setra		
Solaris		
Volvo		
Others		
Total		

Total registrations of electric buses in Q1 2025, GVW >8t - Total Volume: 2.349

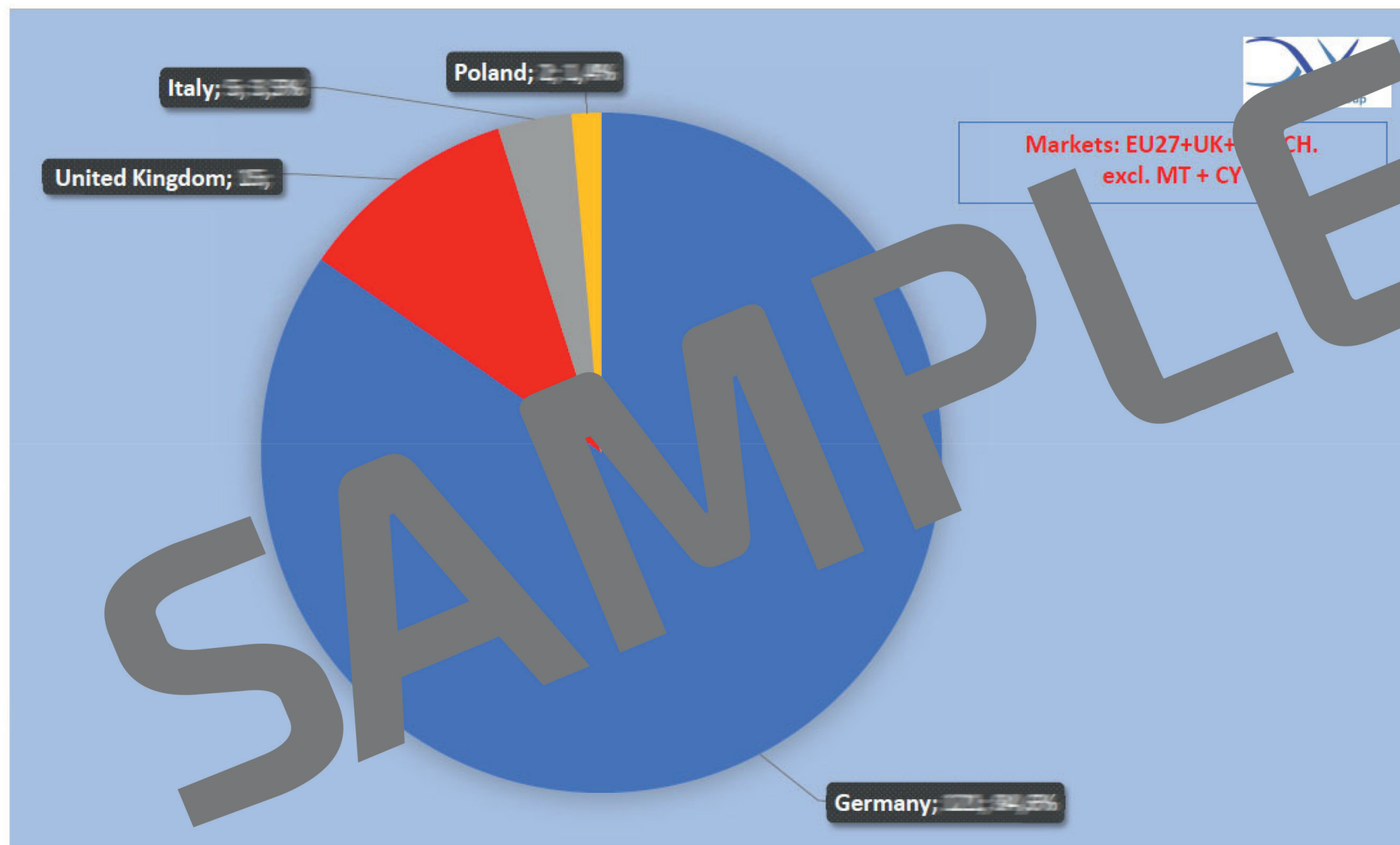
By country



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Registrations of Hydrogen buses in Q1 2025 GVW >8t - Total Volume: 143

By country



Total registrations of hydrogen buses in 2025

GVW >8t, total per country



	NL	BE	Lux	UK	Ire	Ice	NO	SE	FIN	DK	FR	DE	CH	AT	PT	ES	IT	GR	EE	LV	LT	PL	CZ	SK	HU	CY	SI	Total
Alexander Dennis																												
Arthur (PL)																												
Caetano (P)																												
Hyundai (KOR)																												
Irizar (ES)																												
Mercedes (DE)																												
Neso Bus (PL)																												
Safran (FR)																												
Solaris (PL)																												
Solbus (PL)																												
Van Hool																												
VDL Bus & Coach (NL)																												
Wrightbus																												
Others																												

Q1 2025 excl. MT + CY

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



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 **European
Bus Data**