

ANNUAL REPORT 2025



**European
Bus Data**

**Annotated
Sample**

**Market Information
European Bus & Coach Markets
>8 tonnes GVW**



What's included in the full report?

This sample shows illustrative extracts (one country/segment/year). The full report provides **full coverage** across **all included countries, segments, and years**, including the complete set of tables and charts included in the report scope.

- Coverage: EU27 + UK + ICE + NO + CH + SRB + UA (as defined in the report)
- Segment breakdowns (e.g., City/Intercity/Coach)
- Time series and trends across multiple years
- Country-level analysis sections (see "Analyses")

Chapter 1

- Western-European markets 2007-2025
- Eastern-European markets 2009-2025

Chapter 2

- Bus and Coach Registrations, EU27 + UK + ICE + NO + CH + SRB + UA, 2025 >8t
- Bus and Coach Registrations, EU27 + UK + ICE + NO + CH, 2024 >8t
- Bus and Coach Registrations, EU27 + UK + ICE + NO + CH, 2025 >8t (Other makers)
- Results per segment EU27 + UK + ICE + NO + CH, 2021-2025 >8t
- Results per quarter Western Europe + PL, 2020-2025

Bus and Coach Registrations, EU27+UK+ICE+NO+CH, 2024 >8t



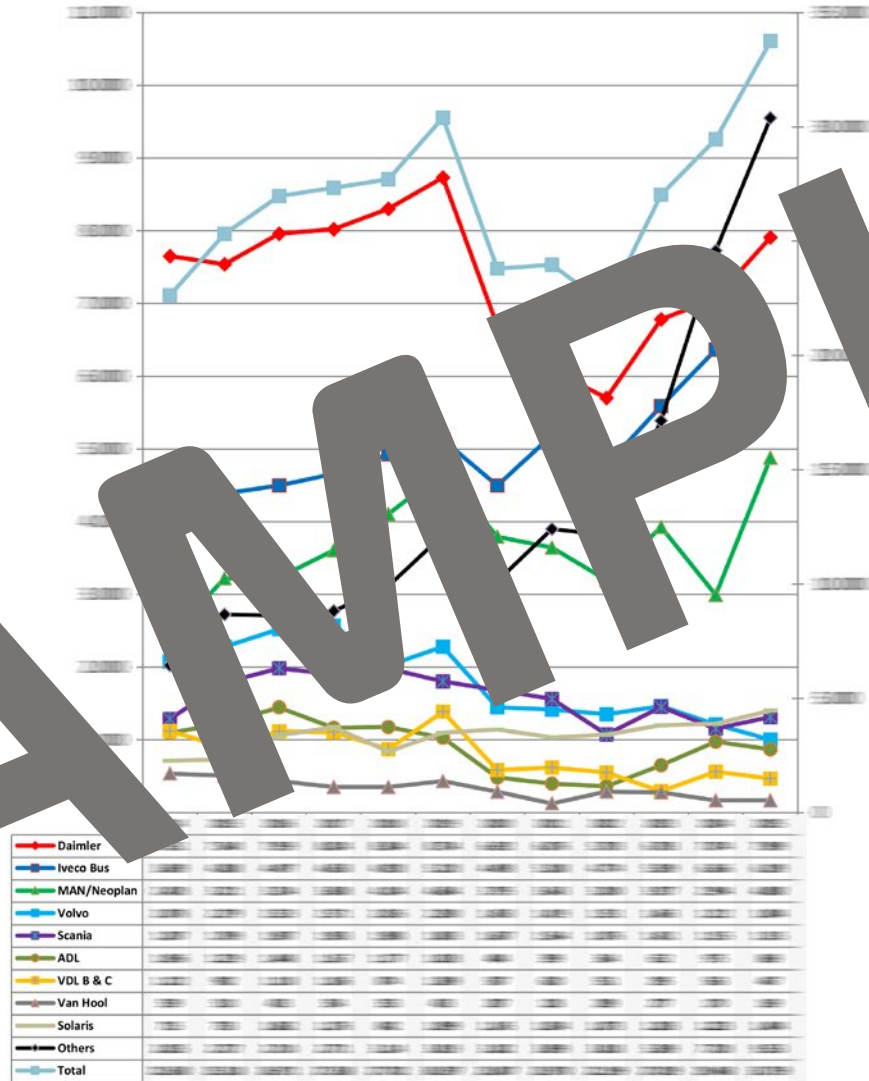
	Daimler Buses		Iveco Bus incl. Heuliez	MAN Truck & Bus		Volvo	Scania	Alexander Dennis	van Hool	VDL Bus & Coach	Temsa	Solaris	Otokar	Irizar	Isuzu	Yutong	BYD	Others	Total 2024		
	Mercedes	Setra		MAN	Neoplan																
Germany																					
France																					
Italy																					
United Kingdom																					
Spain																					
Sweden																					
Netherlands																					
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Latvia																					
Lithuania																					
Poland																					
Romania																					
Slovakia																					
Slovenia																					
Total 2024:																					

SAMPLE

Chapter 3

- Truck related manufacturers versus independent 2008-2025
- Registration volumes/manufacturer, Western Europe + PL, >8t, 2014-2025
- European Take-overs and Mergers since 1987

Registration volumes / builder, Western Europe + Poland >8t



SAMPLE

Chapter 4

- Segments Western-Europe + PL in 2025
- Segments Western-Europe + PL in 2024
- Segments Western-Europe + PL in 2023
- Analysis Segments 2015-2025 in Western-Europe + PL
- Analysis Segments by major countries

Segments in Western-Europe + Poland, 2023

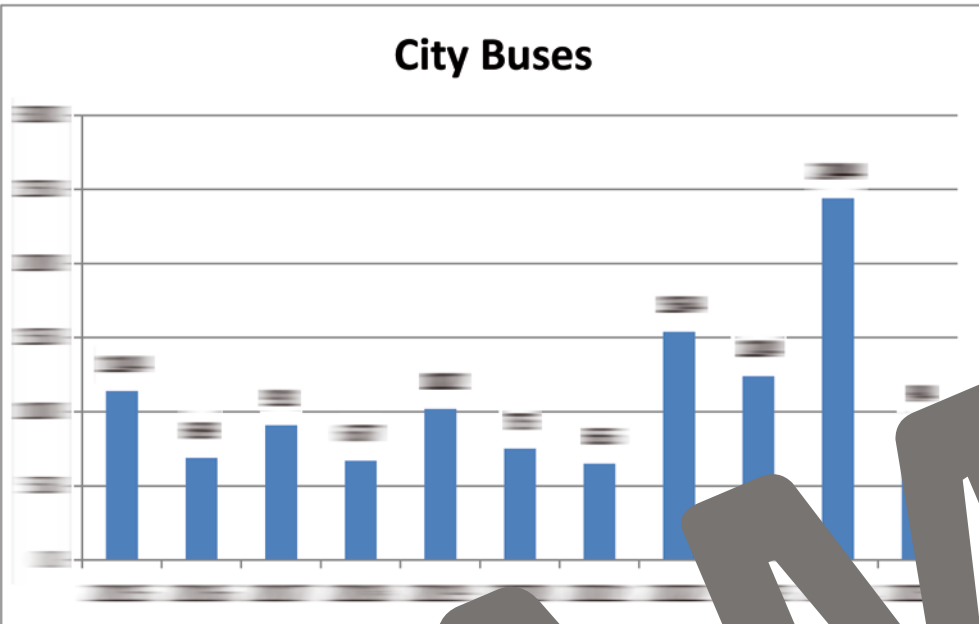


		City		Articulated	City DD	Intercity, incl. School		Coach			Coach P	Total
		8-15,0t	>15t			8-15,0t	>15t	8-15,0t	>15t			
									2 axle	3 axle		
Germany	>8t	19	1.928	1.052	126	1	1.131	34	160	26		4.813
France	>8t	82	1.548	236	11		2.478	25	497	101	16	5.225
Italy	>8t	141	1.048	154	6	21		95	360	51	75	4.101
United Kingdom	>8t	248	702		980			82	439	271	7	7.729
Spain	>8t	45	1.090	119	1	4	668	33	45	266		3.129
Sweden	>8t	47	269	140			228	15	1		51	894
Netherlands	>8t		176	1				3		53	22	359
Belgium	>8t	13	240	5		19	69	61	32	24	10	543
Luxemburg	>8t	31	69				2		4	3	21	214
Portugal	>8t		296	24				38	187	14		781
Austria	>8t		240	25			569	4	60	53	23	1.074
Switzerland	>8t		18				28		43	18	10	479
Norway	>8t		3				259	1	62	91	16	793
Greece	>8t							19	38	1		75
Denmark	>8t		183	12			12	2	5	38	9	261
Ireland	>8t		8		34			48	121	18	31	271
Finland	>8t		107				1	1	8	4		125
Iceland	>8t	12	1			1	4	2	8			28
Poland	>8t	25	558	255			65	37	73	104	18	1.135
Total:		815	9.037	2.385	1.176	82	7.855	931	2.860	1.477	411	27.029
		13.413				7.937		5.679				

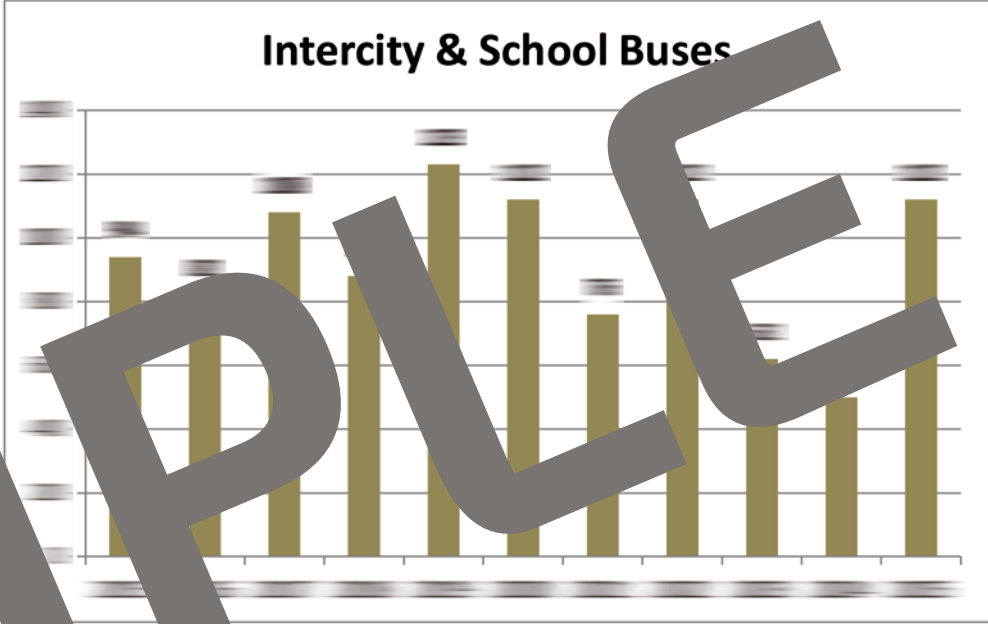
Analysis Segments 2015 - 2025 in Luxembourg



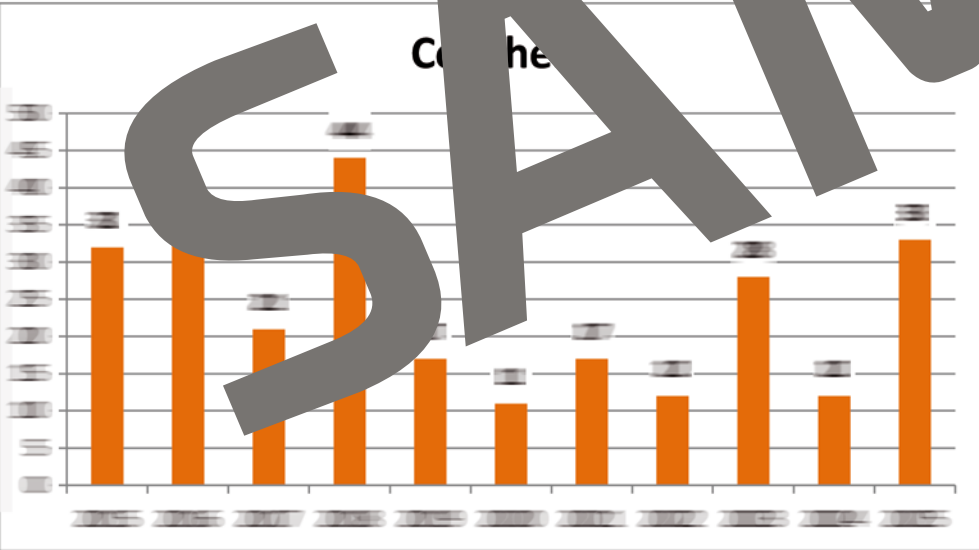
City Buses



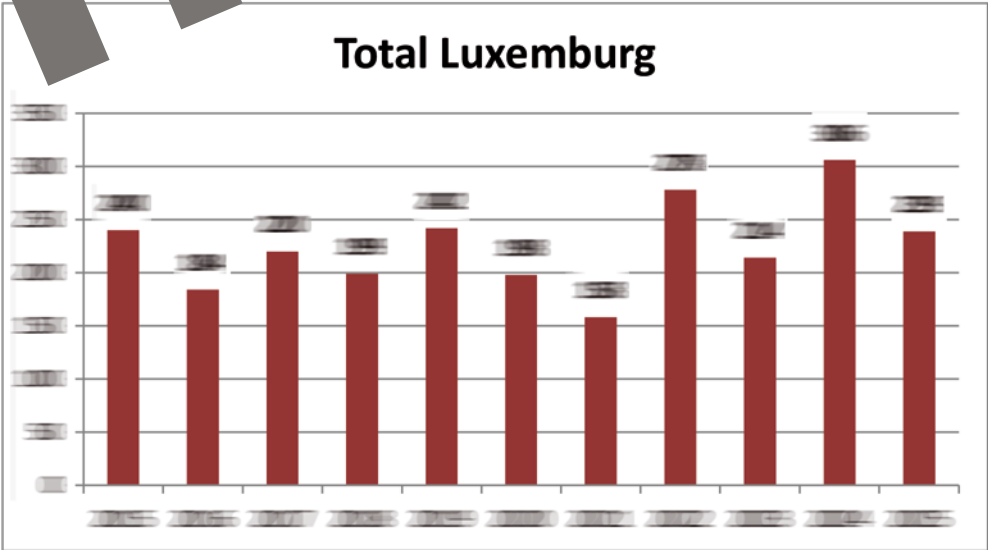
Intercity & School Buses



Coaches



Total Luxembourg



Chapter 5

- Segments in detail 2025
- Segments in detail 2024

Bus and Coach Registrations per Segment, Western Europe + Poland, 2024 >8t



Intercity, GVW >15t		Daimler Buses		Iveco incl. Heuliez	MAN Truck & Bus		Volvo	Scania	ADL	van Hool	VDL Bus & Coach	Temsa	Solaris	Otokar	Irizar	Isuzu	Yutong	Others	Total 2024	
		Mercedes	Setra		MAN	Neoplan														
Germany	>8t	61	231	313	155		10	1				1				5				817
France	>8t	539		1.570			10					160		41	8		17			2.384
Italy	>8t	280	19	1.483	5									4			10		8	1.980
United Kingdom	>8,5t																			
Spain	>8t	414		149	88		19	11				4		9				8		718
Sweden	>8t	49		3			3	1											30	86
Netherlands	>8t	6	1	260																267
Belgium	>8t	16		169	8			1									4		8	209
Luxemburg	>8t	40	1	2	7															50
Portugal	>8t	67		1	26															198
Austria	>8t	51	4		23															373
Switzerland	>8t	12		1	5															34
Norway	>8t	47		3													31		4	111
Greece																	250			251
Denmark	>8t	3		2																5
Ireland	>8t																			
Finland								1												7
Iceland	>8t			6																46
Poland	>8t			3	4										1	1	6		3	82
		1.592			324															
Total 2024:				4.445	324		67	14				186		54	149	6	318	8	123	7.579
		24,87%		58,65%	4,27%		0,88%	0,18%				2,45%		0,71%	1,97%	0,08%	4,20%	0,11%	1,62%	

5.860
77,3%

**ANNUAL
REPORT**

2025



**European
Bus Data**

**Alternative Drivelines for buses
>8 tonnes GVW**

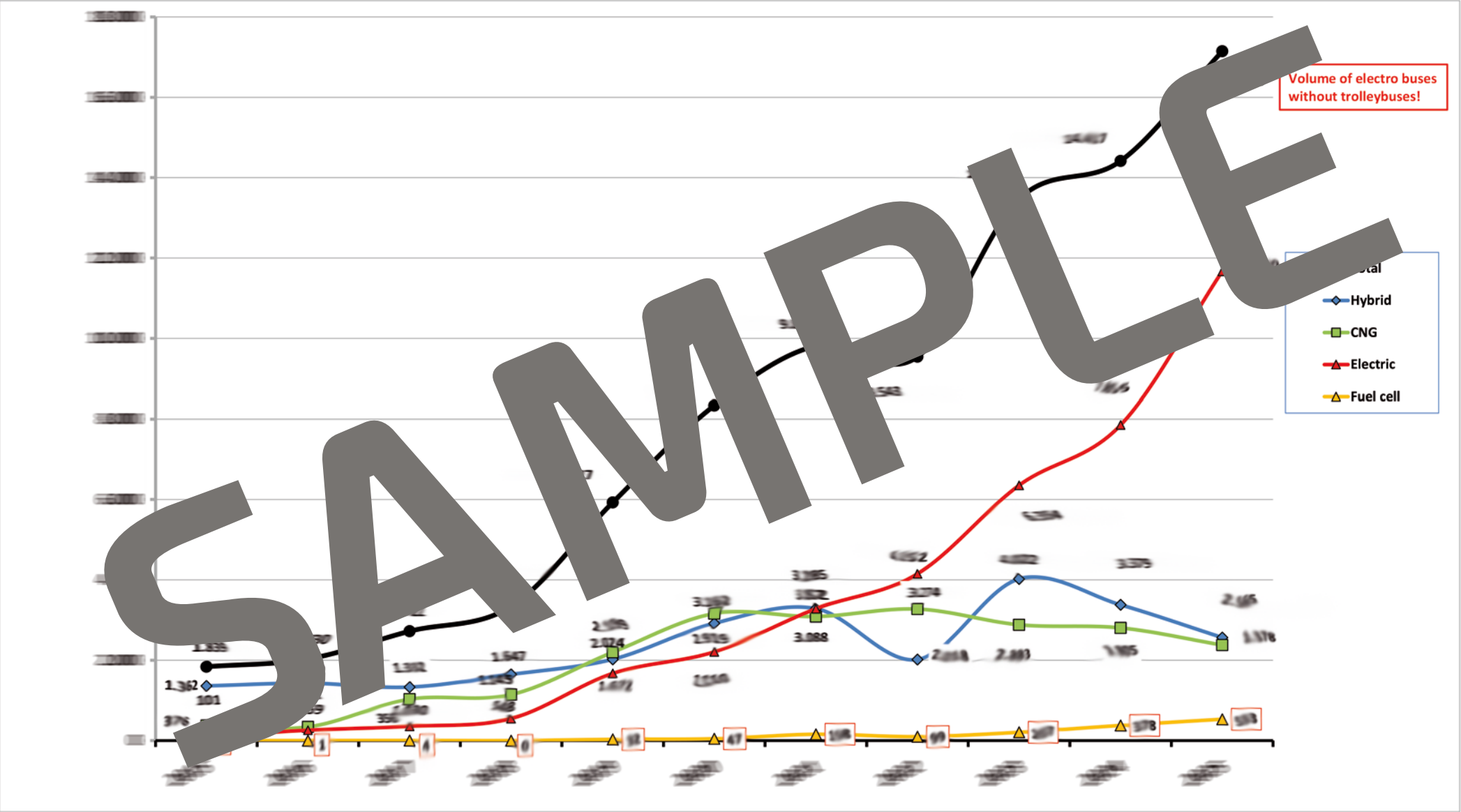


Chapter 6

- Analyses alternative drivelines 2012-2025
- Total numbers of “not-diesel” buses
- Development shares Alternative Drivelines
- Registrations figures for EU27 + UK + ICE + NO + CH + SRB + UA, 2024-2025 >8t
- Electric buses in 2025, by maker/country
- Hydrogen buses in 2025, by maker/country

Development of Alternative Drivelines, GVW >8t

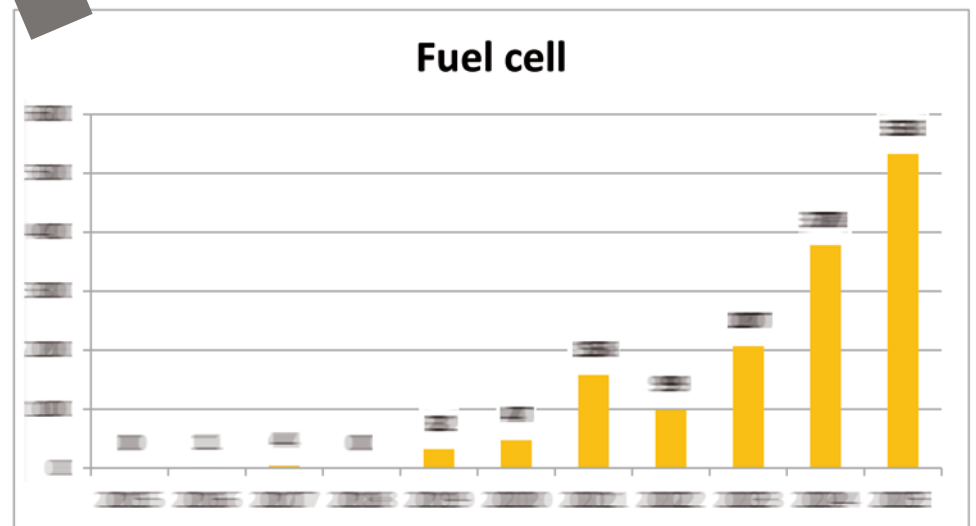
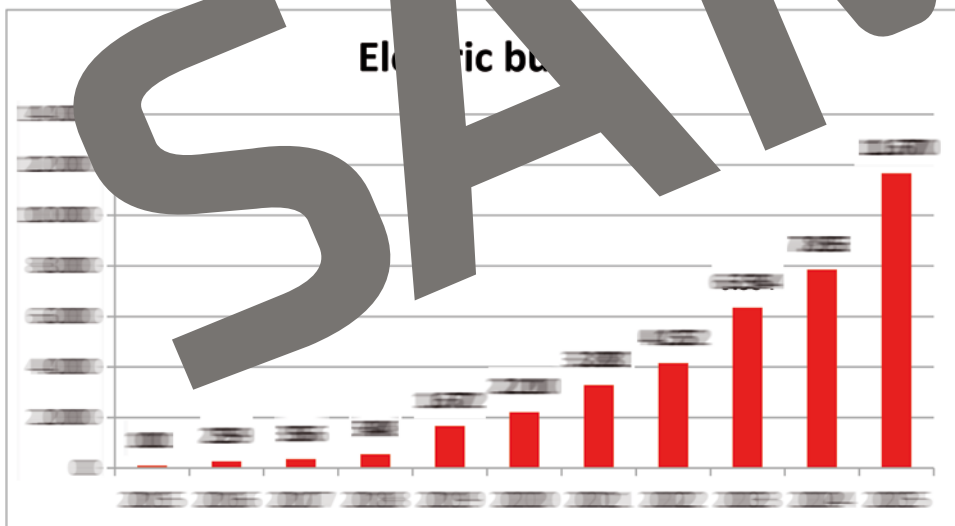
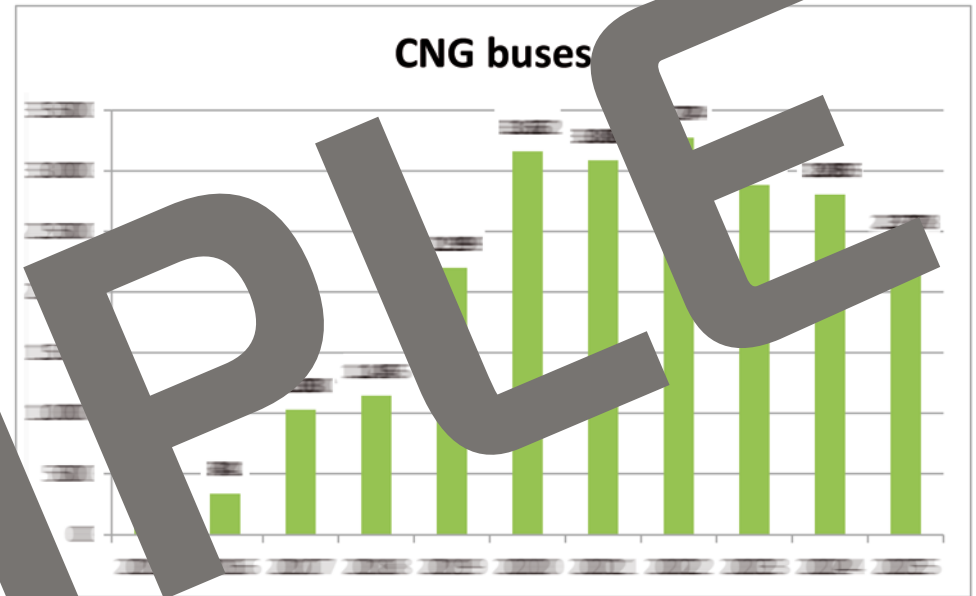
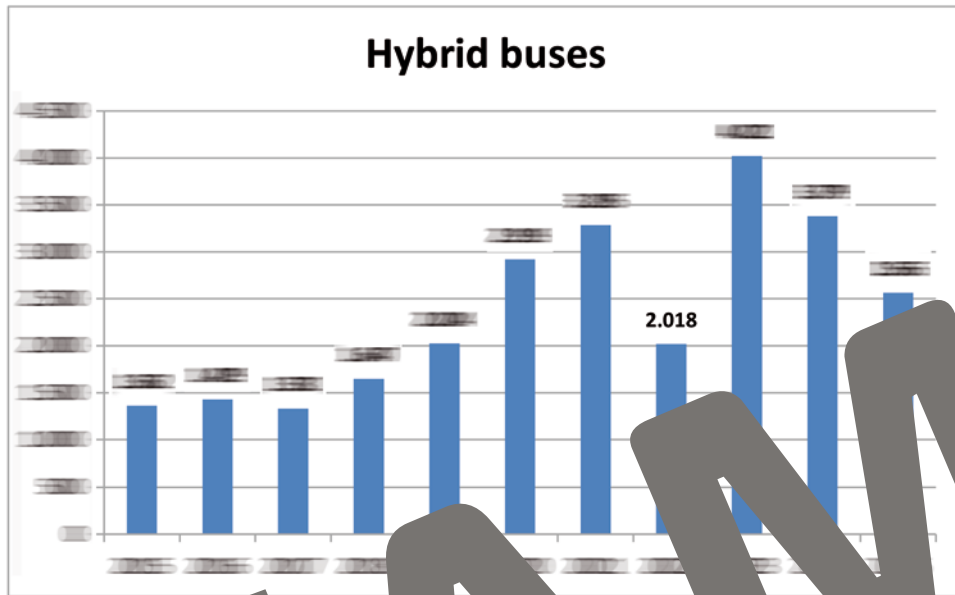
Years 2015-2019: Western-Europe + Poland / Years 2020-2025: EU27+UK+ICE+NO+CH



Development of Alternative Drivelines, GVW >8t



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



Volume of electric buses without trolleybuses

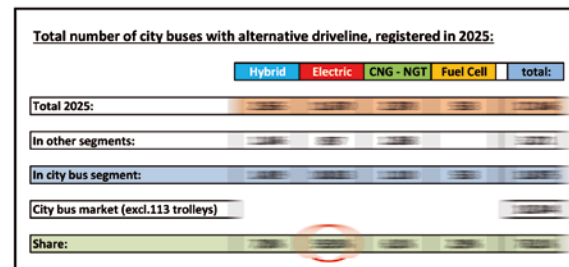
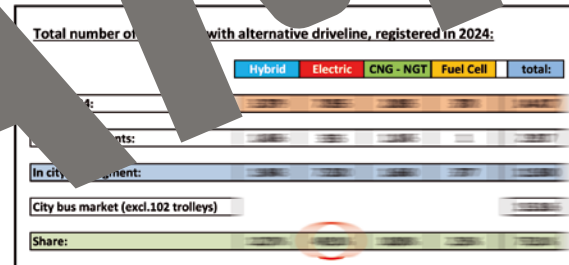
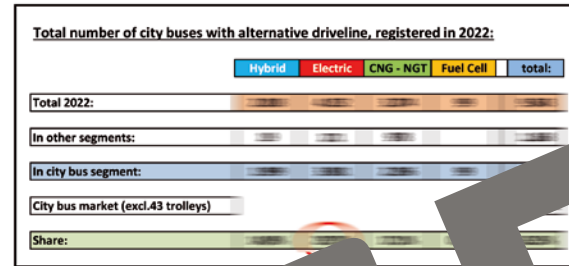
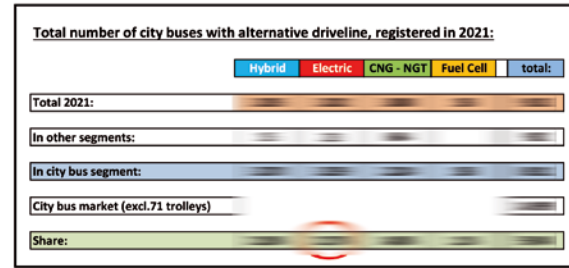
SAMPLE

Total number "not-diesel"-buses, registered in 2024



	Hybrid	Electric	CNG - NGT	Fuel Cell	total:
Germany	762	638	62	225	1.687
France	643	605	1.073		2.321
Italy	759	984	1.386	43	3.172
United Kingdom		1.613		24	1.637
Spain	824	614	54	54	1.546
Sweden		237	12		249
Netherlands		402	4		406
Belgium	74	187			263
Luxemburg	4	238			246
Portugal		63			63
Austria	67	8			75
Switzerland	94			1	95
Norway					270
Greece		263			263
Denmark		374			374
Ireland		227			227
Finland		315	1		316
Iceland		6			6
Poland	84	173	129	31	417
Estonia		16			16
Latvia		3			3
Lithuania		13	23		36
Czech Republic	13	57	47		117
Slovakia					
Hungary		2			2
Croatia					
Romania	55	336			391
Bulgaria		5			5
Slovenia		3			3
Total:	3.379	7.855	2.805	378	14.417

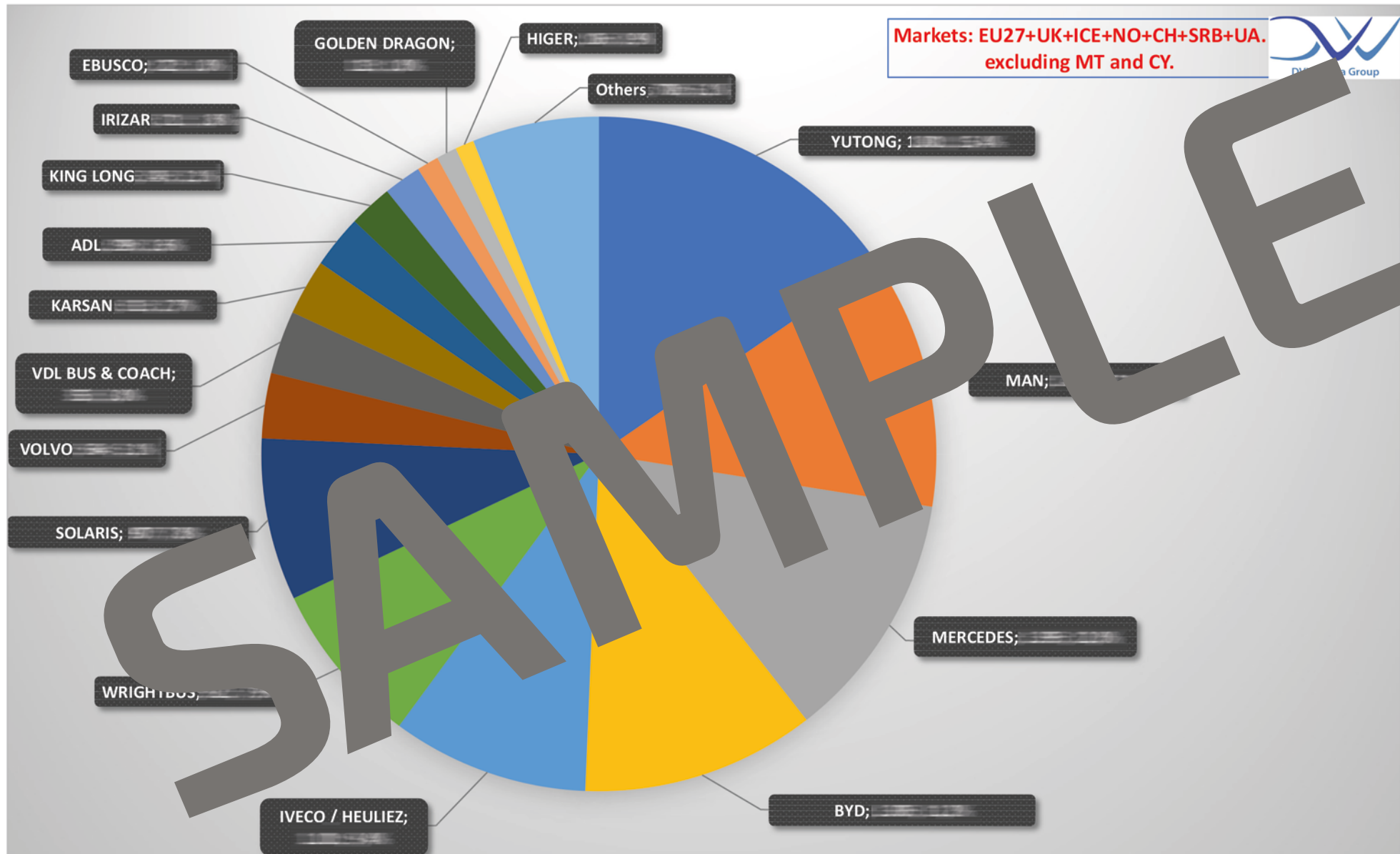
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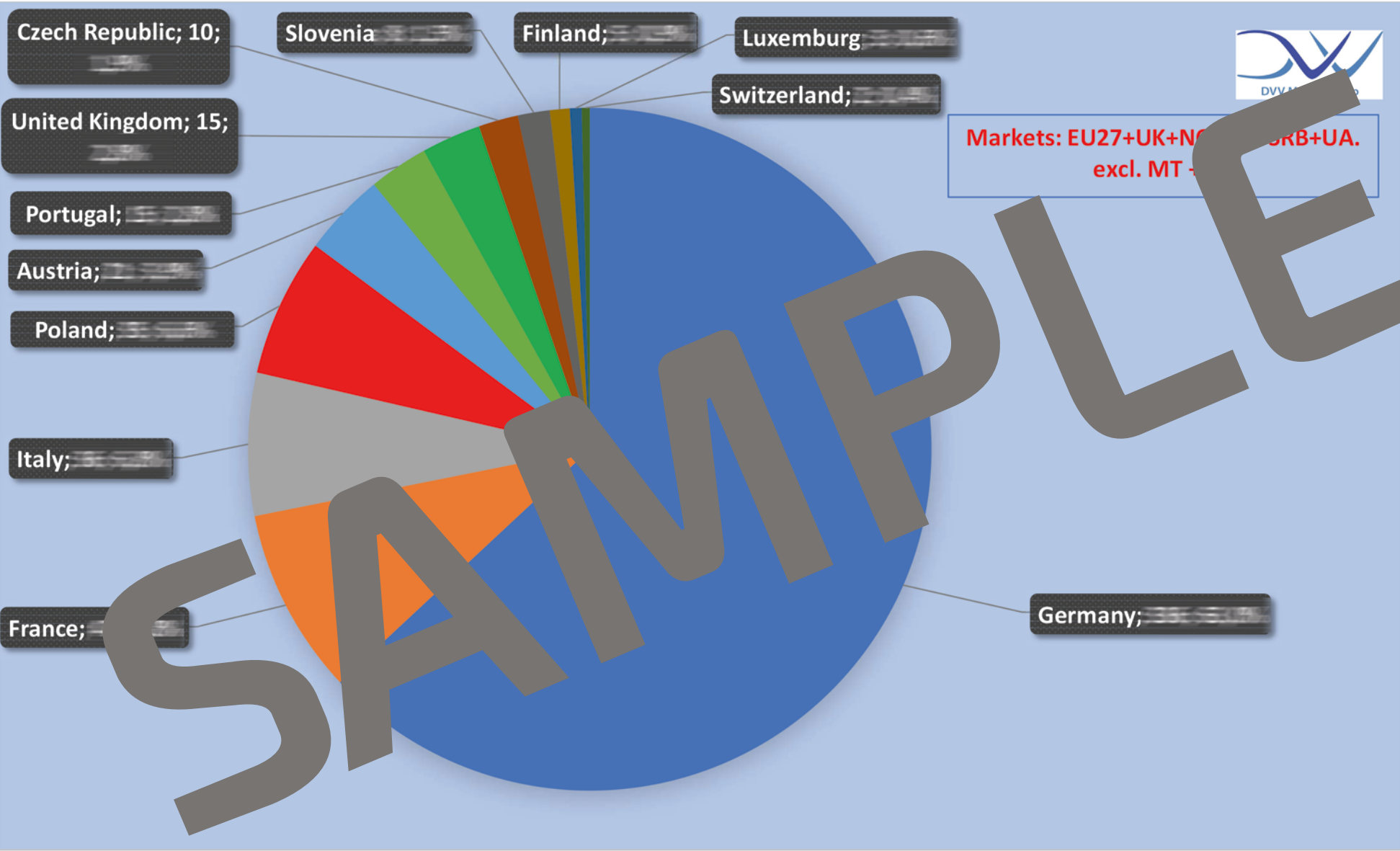
Total registrations of electric buses in 2025 GVW >8t - Total Volume: 1150

By manufacturer



Registrations of Hydrogen buses in 2025 GVW >8t - Total Volume: 558

By country



Total registrations of hydrogen buses in 2013 upto and including 2025
 GVW >8t, total per year



	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	Total
Alexander Dennis											200			200
Arthur (PL)												1		1
Autosan (PL)														11
Caetano (P)											300	300		600
Hyundai (KOR)										1				1
Irizar (ES)														11
Mercedes (DE)	3	3										100	100	206
Neso Bus (PL)										11	200	100	200	511
Rampini													100	100
Safra (FR)							65	77	55				55	252
Solaris							100	307	500	77	2000	2000	2000	5577
Van Hool (BE)					1		201	307	201	100	300	11	40	1061
VDL B							40							40
Wrightbus (UK)									701	101	100	300	100	1202
Others													100	100
	3	3			1		146	407	1000	100	2007	2000	2000	5577

Years 2013-2019: Western-Europe + Poland / Years 2020 - 2025: EU27+UK+ICE+NO+CH (excl. MT + CY)

Chapter 7

- Developments per competitor 2010-2025

King Long Registrations,
Europe, >8t



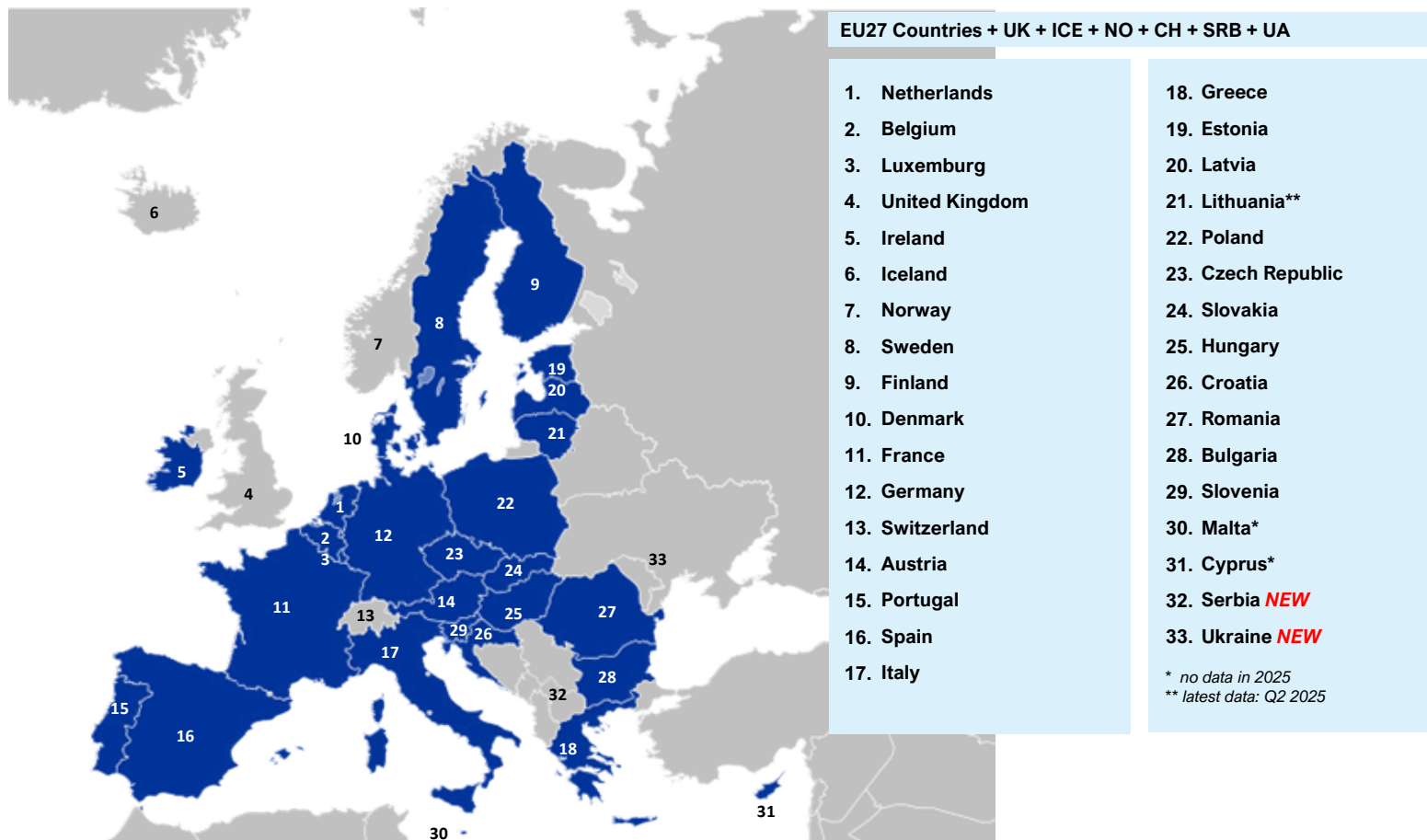
King Long	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	Total
Germany >8t																	
France >8t																	
Italy >8t																	
United Kingdom >8,5t																	
Spain >8t																	
Sweden >8t																	
Netherlands >8t																	
Belgium >8t																	
Luxemburg >8t																	
Portugal >8t																	
Austria >8t																	
Switzerland >8t																	
Norway >8t																	
Greece >8t																	
Denmark >8t																	
Ireland >8t																	
Finland >8t																	
Iceland >8t																	
Totals 2010-2025:																	

Total Market	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	Total
Poland																	
Czechia																	
Slovakia																	
Slovenia																	
Hungary																	
Croatia																	
Bulgaria																	
Romania																	
Latvia																	
Lithuania																	
Estonia																	
Total																	
Grand total:																	

SAMPLE

Chapter 8

• Registrations 2024-2025



Registrations 2024 and 2025, Finland - 1

Total, > 8t GVW

Year to date: December



	2024	2025
TOM	1000	1000
NO	1000	1000
ISU	1000	1000
IVEC	1000	1000
MAN	1000	1000
MERCEDES	1000	1000
SCANIA	1000	1000
SETRA	1000	1000
TEMSA	1000	1000
VDL	1000	1000
VOLVO	1000	1000
YUTONG	1000	1000
Others	1000	1000
Total	10000	10000

Contact

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



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