



10 APRIL 2026

## AUTOMOBILE MARKET OF RUSSIA IN MARCH AND JANUARY-MARCH 2026 NEW TRUCKS AND BUSES

In March and in January-March 2026, sales of new trucks and buses in Russia showed the following results\*:

- Trucks (except light trucks, N1 category) including special-purpose vehicles – 4 651 units in March 2026, down 9.8% YOY; 11 801 units in January-March 2026, down 28.9% YOY.
- Buses and coaches (except minibuses, M2 category) – 866 units in March 2026, up 16.2% YOY; 1 912 units in January-March 2026, down 4.0% YOY. Among them – electric buses: 54 units in March 2026, up 285.7% YOY; 159 units in January-March 2026, up 40.7% 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:

In March 2026, sales of trucks showed an impressive growth by 19% over the results of February 2026, having reached 4 651 units, however there was a fall of sales vs. March 2025 by 10% (5 158 units). The total truck sales in January-March 2026 including special-purpose vehicles decreased by 29% in comparison with the same period of the last year – from 16 603 to 11 801 units. The current situation on the market of new heavy-duty trucks indicates signs of stagnation.

### Key trends:

- Sales of foreign-branded trucks in the first three months of 2026 showed a sharp decline by 41% as compared to January-March 2025, from 9 707 units to 5 688 units. Their market share has also significantly decreased from 58% to 48%.
- On the background of falling sales of foreign brands, domestic OEMs demonstrated growth of their market share. Despite decrease of sales of Russian-branded new trucks in January-March 2026 by 11% (to 6 113 units), their market share expanded from 42% to 52%.
- KAMAZ was the best-selling truck brand in Q1 2026 (3 899 sales, down 14%), gaining 33% of the new truck market. The best-selling truck model in January-March 2026 remained the KAMAZ 43118 (6x6) with 881 trucks sold (down 21%).
- The bus market grew by 16% (to 866 vehicles) in March 2026, but Q1 2026 sales fell by 4% YOY to 1 912 units.
- The share of domestic brands in January-March 2026 was 72% of the new bus market, with 1 374 buses sold (down 10%).
- Sales of Russian-branded electric buses in the first three months of this year grew by 40.7% to 159 units.
- PAZ brand keeps leadership in January-March 2026 with 569 buses sold (down 47%) and a 30% market share.

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# TRUCKS

## Sales of new trucks in Russia in March and 3 months 2026 by brand, inclusive of special-purpose vehicles

Brand	March 2026	March 2025	3 months 2026	3 months 2025	Change March 2026 vs 2025, %	Change 3 months 2026 vs 2025, %
KAMAZ	1 531	1 583	3 899	4 522	-3,3	-13,8
GAZ	262	400	846	1 315	-34,5	-35,7
FAW	295	384	831	1 194	-23,2	-30,4
SITRAK	250	515	786	2 642	-51,5	-70,2
URAL	342	271	739	771	26,2	-4,2
MAZ	275	291	696	855	-5,5	-18,6
DONGFENG	393	214	679	648	83,6	4,8
VALDAI	299	16	561	153	1 768,8	266,7
HOWO	215	205	551	468	4,9	17,7
SHAANXI	188	373	519	1 272	-49,6	-59,2
ISUZU	152	168	484	456	-9,5	6,1
JAC	152	178	316	594	-14,6	-46,8
FOTON	76	152	247	464	-50,0	-46,8
SANY	65	106	219	224	-38,7	-2,2
ZOOMLION	38	44	94	97	-13,6	-3,1
XU GONG	28	52	60	94	-46,2	-36,2
AMT	15	52	42	124	-71,2	-66,1
VOLVO	12	32	28	142	-62,5	-80,3
SCANIA	13	10	25	56	30,0	-55,4
CHENGLONG	12	1	22	15	1 100,0	46,7
MERCEDES	5	15	15	105	-66,7	-85,7
MAZ MAN	0	12	12	50	-100,0	-76,0
SHANQI	2	5	12	32	-60,0	-62,5
HYUNDAI	5	4	11	32	25,0	-65,6
MAN	3	4	11	33	-25,0	-66,7
NEMO	1	0	11	0		
JMC	3	9	10	36	-66,7	-72,2
DAEWOO	4	13	8	34	-69,2	-76,5
LIUGONG	5	8	8	23	-37,5	-65,2
SOLLERS	0	0	8	0		
HONGYAN	0	19	7	65	-100,0	-89,2
KERUI	0	0	7	0		
AMBERTRUCK	2	0	5	0		
AMUR	1	9	5	10	-88,9	-50,0
BEIBEN	2	1	5	9	100,0	-44,4
BZKT	2	0	5	0		
DAYUN	1	1	4	14	0,0	-71,4
DAF	2	3	3	10	-33,3	-70,0
IVECO	0	0	3	4		-25,0
FUSO	0	0	1	7		-85,7
HINO	0	2	1	8	-100,0	-87,5
JEREH	0	0	1	0		



# TRUCKS

Brand	March 2026	March 2025	3 months 2026	3 months 2025	Change March 2026 vs 2025, %	Change 3 months 2026 vs 2025, %
KAMA	0	0	1	0		
RENAULT	0	0	1	0		
URAMAN	0	0	1	0		
ZIL	0	1	1	1	-100,0	0,0
BEIFANG BENCHI	0	0	0	1		-100,0
CAMC	0	0	0	4		-100,0
CHENGLIWEI	0	1	0	1	-100,0	-100,0
FORD	0	1	0	10	-100,0	-100,0
KAMAG	0	1	0	1	-100,0	-100,0
LIEBHERR	0	0	0	2		-100,0
MZKT	0	1	0	3	-100,0	-100,0
SDAC	0	1	0	2	-100,0	-100,0
<b>TOTAL</b>	<b>4 651</b>	<b>5 158</b>	<b>11 801</b>	<b>16 603</b>	<b>-9,8</b>	<b>-28,9</b>
<b>TOTAL Russian brands</b>	<b>2 454</b>	<b>2 332</b>	<b>6 113</b>	<b>6 896</b>	<b>5,2</b>	<b>-11,4</b>
<b>TOTAL foreign brands</b>	<b>2 197</b>	<b>2 826</b>	<b>5 688</b>	<b>9 707</b>	<b>-22,3</b>	<b>-41,4</b>

## Sales of new trucks in Russia in March and 3 months 2026 by type

Type	March 2026	March 2025	3 months 2026	3 months 2025	Market share March 2026, %	Market share March 2025, %	Market share 3 months 2026, %	Market share 3 months 2025, %
Other special equipment	2 200	2 909	6 118	8 503	47,3	56,4	51,8	51,2
Truck-tractor	1 055	793	2 101	3 056	22,7	15,4	17,8	18,4
Other truck types	364	422	906	1 684	7,8	8,2	7,7	10,1
Dump truck	338	347	901	1 081	7,3	6,7	7,6	6,5
Drop-side flat bed	334	277	784	833	7,2	5,4	6,6	5,0
Refrigerator	101	112	316	508	2,2	2,2	2,7	3,1
Van	61	110	240	423	1,3	2,1	2,0	2,6
Autocrane	86	96	178	221	1,9	1,9	1,5	1,3
Tanker	59	55	139	186	1,3	1,1	1,2	1,1
Mobile repair shop	45	20	85	78	1,0	0,4	0,7	0,5
Refueler	7	16	30	29	0,2	0,3	0,3	0,2
Autoloader	1	1	2	1	0,0	0,0	0,0	0,0
Not identified	0	0	1	0	0,0	0,0	0,0	0,0
<b>TOTAL</b>	<b>4 651</b>	<b>5 158</b>	<b>11 801</b>	<b>16 603</b>	<b>100,0</b>	<b>100,0</b>	<b>100,0</b>	<b>100,0</b>



# TRUCKS

## Top 25 model ranking of new truck sales in Russia in March and 3 months 2026

Rank	Model	Brand	March 2026	March 2025	3 months 2026	3 months 2025	Change March 2026 vs 2025,%	Change 3 months 2026 vs 2025,%
1	43118 6X6	KAMAZ	355	420	881	1 115	-15,5	-21,0
2	GAZON NEXT	GAZ	205	340	669	1 088	-39,7	-38,5
3	5490 4X2	KAMAZ	256	215	608	740	19,1	-17,8
4	65115 6X4	KAMAZ	198	193	572	655	2,6	-12,7
5	4320 6X6	URAL	261	203	514	571	28,6	-10,0
6	45	VALDAI	271	16	502	122	1 593,8	311,5
7	J6 6X4	FAW	151	209	407	708	-27,8	-42,5
8	ELF	ISUZU	115	124	370	348	-7,3	6,3
9	C7H 6X4	SITRAK	92	264	337	1 340	-65,2	-74,9
10	GX	DONGFENG	309	6	315	194	5 050,0	62,4
11	C7H 4X2	SITRAK	123	195	313	1 076	-36,9	-70,9
12	J6 6X6	FAW	97	80	310	148	21,2	109,5
13	43253 4X2	KAMAZ	117	95	273	193	23,2	41,5
14	53605 4X2	KAMAZ	76	87	262	170	-12,6	54,1
15	T5G 4X2	HOWO	61	118	257	118	-48,3	117,8
16	6520 6X4	KAMAZ	81	94	255	307	-13,8	-16,9
17	5340 4X2	MAZ	104	83	225	235	25,3	-4,3
18	SX 331 8X4	SHAANXI	89	160	205	507	-44,4	-59,6
19	6312 6X4	MAZ	76	63	172	222	20,6	-22,5
20	SADKO NEXT	GAZ	57	33	169	144	72,7	17,4
21	T5G 6X4	HOWO	77	50	167	173	54,0	-3,5
22	DFH-SERIES	DONGFENG	0	154	161	265	-100,0	-39,2
23	5557 6X6	URAL	53	36	149	104	47,2	43,3
24	SX 425 6X4	SHAANXI	41	104	146	285	-60,6	-48,8
25	KOMPAS 9 4X2	KAMAZ	54	122	144	251	-55,7	-42,6

### 3 months 2026

KAMAZ 43118 6X6

881 units **-21%**

KAMAZ 5490 4X2

608 units **-17,8%**

GAZ GAZON NEXT

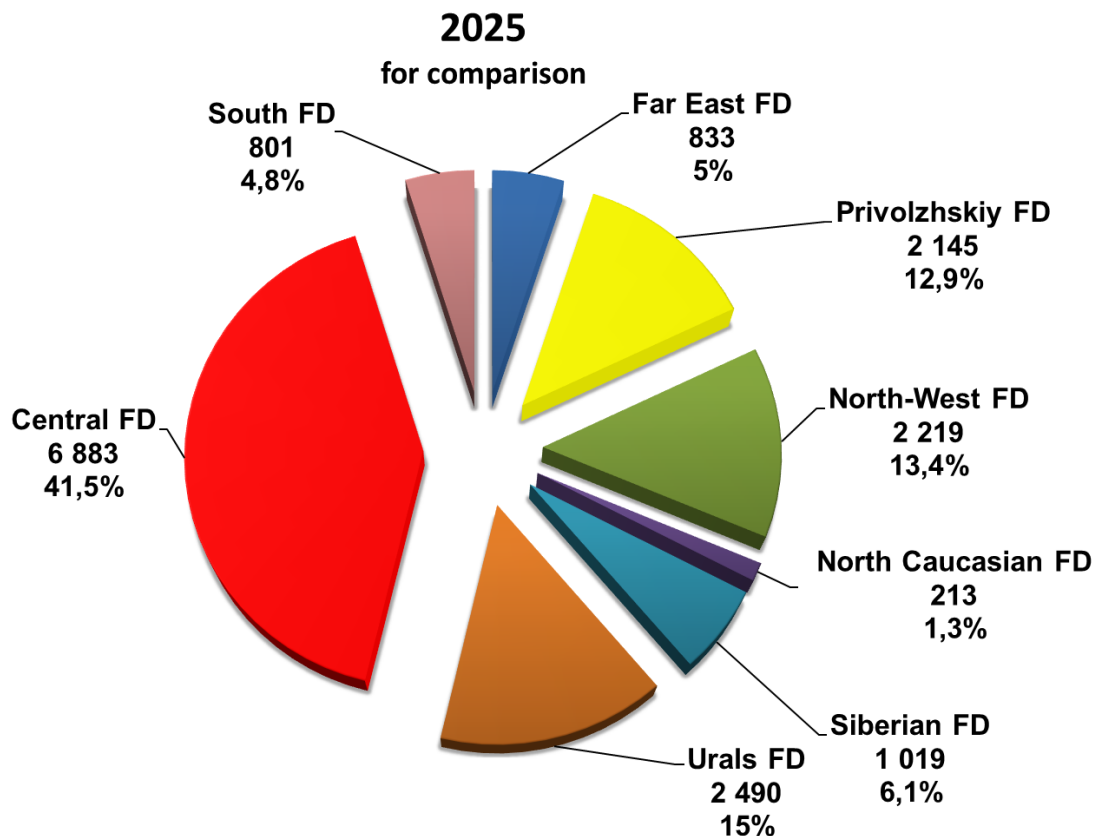
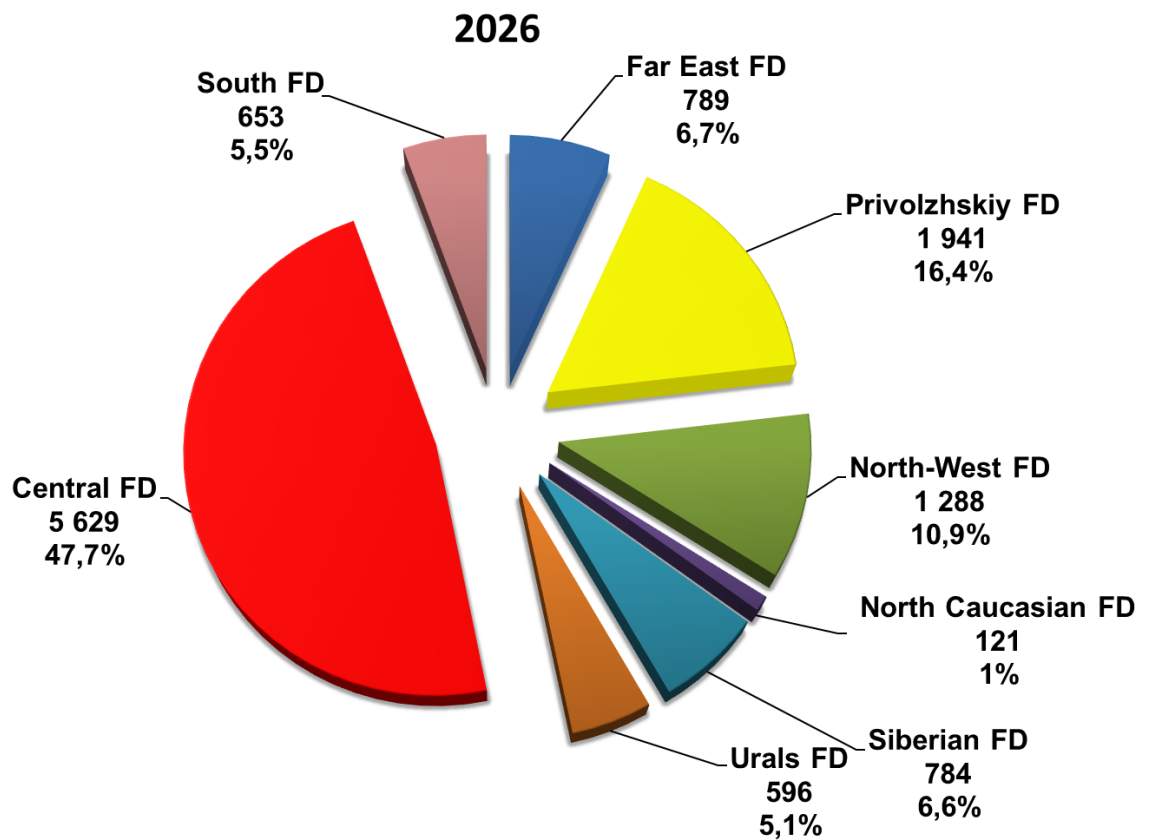
669 units **-38,5%**





# TRUCKS

## Structure of sales of new truck in Russia in 3 months 2026 by Federal District





# BUSES

## Sales of new buses in Russia in March and 3 months 2026 by brand

Brand	March 2026	March 2025	3 months 2026	3 months 2025	Change March 2026 vs 2025, %	Change 3 months 2026 vs 2025, %
PAZ	245	401	569	1 016	-38,9	-44,0
LIAZ	135	71	267	129	90,1	107,0
YUTONG	78	98	251	274	-20,4	-8,4
NEFAZ	106	24	165	104	341,7	58,7
MAZ	101	24	152	39	320,8	289,7
KAMAZ	78	5	142	97	1 460,0	46,4
VOLGABUS	30	0	112	15		646,7
HIGER	26	21	66	79	23,8	-16,5
KAVZ	14	33	43	117	-57,6	-63,2
SIMAZ	3	9	36	9	-66,7	300,0
GOLDEN DRAGON	13	19	32	36	-31,6	-11,1
ZHONGTONG	16	4	32	19	300,0	68,4
URAL	6	11	24	18	-45,5	33,3
SOLLERS	10	0	12	0		
FOTON	0	1	3	1	-100,0	200,0
LOTOS	3	3	3	3	0,0	0,0
ASIASTAR	1	1	2	1	0,0	100,0
BMZ	1	13	1	18	-92,3	-94,4
ASIA	0	0	0	3		-100,0
AVIOR	0	2	0	2	-100,0	-100,0
KING LONG (KLM)	0	4	0	8	-100,0	-100,0
NEMAN	0	1	0	3	-100,0	-100,0
<b>TOTAL</b>	<b>866</b>	<b>745</b>	<b>1 912</b>	<b>1 991</b>	<b>16,2</b>	<b>-4,0</b>
<b>TOTAL Russian brands</b>	<b>631</b>	<b>570</b>	<b>1 374</b>	<b>1 526</b>	<b>10,7</b>	<b>-10,0</b>
<b>TOTAL foreign brands</b>	<b>235</b>	<b>175</b>	<b>538</b>	<b>465</b>	<b>34,3</b>	<b>15,7</b>

## Sales of new electric buses in Russia in March and 3 months 2026 by brand

Brand	March 2026	March 2025	3 months 2026	3 months 2025	Change March 2026 vs 2025, %	Change 3 months 2026 vs 2025, %
LIAZ	51	1	100	16	5000,0	525,0
KAMAZ	2	0	56	79		-29,1
PAZ	0	0	2	0		
BMZ	1	13	1	18	-92,3	-94,4
<b>TOTAL</b>	<b>54</b>	<b>14</b>	<b>159</b>	<b>113</b>	<b>285,7</b>	<b>40,7</b>
<b>TOTAL Russian brands</b>	<b>54</b>	<b>14</b>	<b>159</b>	<b>113</b>	<b>285,7</b>	<b>40,7</b>
<b>TOTAL foreign brands</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0,0</b>	<b>0,0</b>



# BUSES

## Top 25 model ranking of new bus sales in March and 3 months 2026

Rank	Model	Brand	March 2026	March 2025	3 months 2026	3 months 2025	Change March 2026 vs 2025, %	Change 3 months 2026 vs 2025, %
1	CITYMAX 12	LIAZ	131	55	263	98	138,2	168,4
2	4234	PAZ	97	150	192	364	-35,3	-47,3
3	VECTOR NEXT	PAZ	59	101	168	270	-41,6	-37,8
4	3205	PAZ	57	142	165	358	-59,9	-53,9
5	5299, 5297 4X2	NEFAZ, KAMAZ	103	23	158	103	347,8	53,4
6	6127	YUTONG	48	65	144	166	-26,2	-13,3
7	CITYRITM 12	VOLGABUS	4	0	84	4		2 000,0
8	VEGA	KAMAZ	75	5	78	18	1 400,0	333,3
9	206 - 226	MAZ	78	7	78	8	1 014,3	875,0
10	5222	KAMAZ	2	0	56	0		
11	216047	MAZ	0	0	51	0		
12	4238	KAVZ	12	30	39	100	-60,0	-61,0
13	KLQ 6129	HIGER	13	7	32	32	85,7	0,0
14	LCK-SERIES	ZHONGTONG	16	4	32	19	300,0	68,4
15	6899	YUTONG	14	7	31	31	100,0	0,0
16	4282	SIMAZ	3	0	30	0		
17	6852	YUTONG	0	4	28	4	-100,0	600,0
18	3204	PAZ	20	2	27	13	900,0	107,7
19	3255 4320 6X6	URAL	6	11	24	18	-45,5	33,3
20	XML	GOLDEN DRAGON	6	17	22	32	-64,7	-31,2
21	KLQ-SERIES	HIGER	5	11	20	22	-54,5	-9,1
22	257	MAZ	17	0	17	1		1 600,0
23	4298	VOLGABUS	16	0	16	0		
24	6122	YUTONG	2	9	15	44	-77,8	-65,9
25	KLQ 6119	HIGER	8	0	13	2		550,0

### 3 months 2026

LIAZ CITYRITM 12

263 units **168,4%**

PAZ 4234

192 units **-47,3%**



PAZ VECTOR NEXT

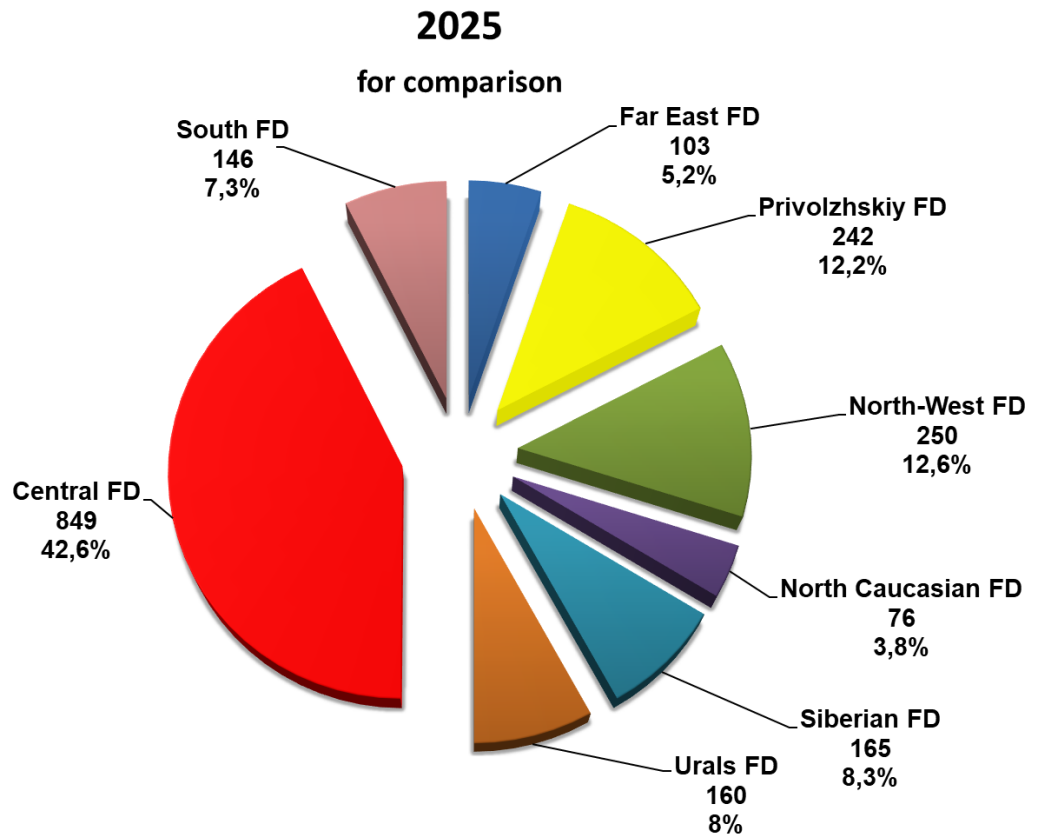
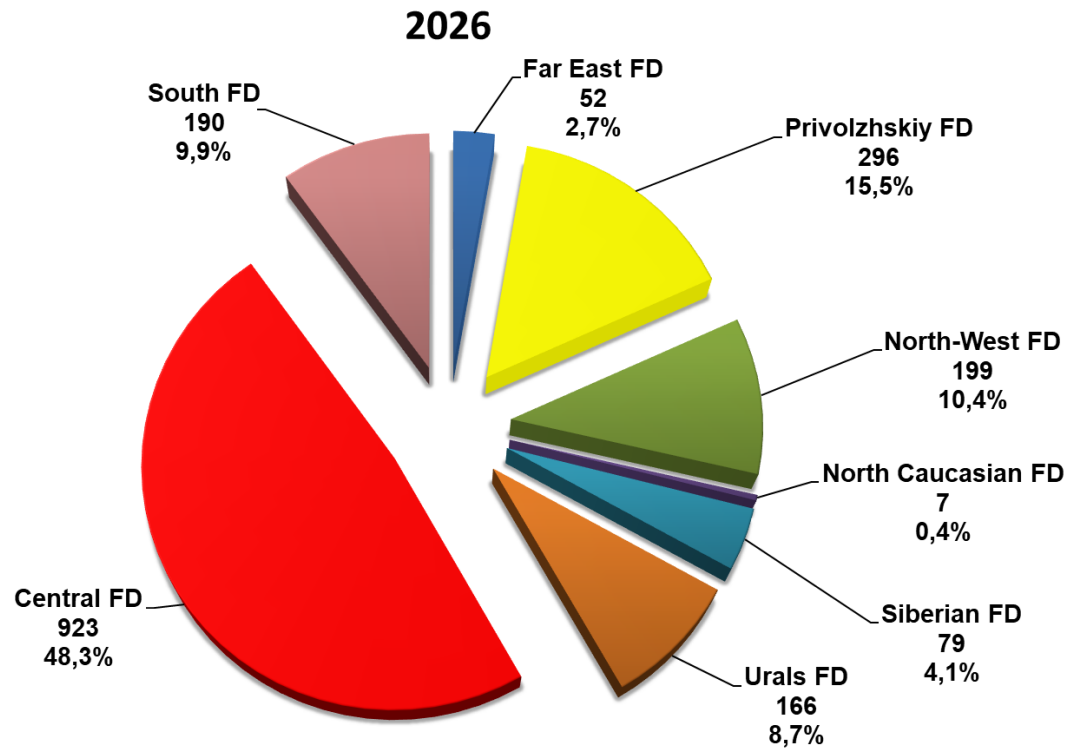
168 units **-37,8%**





# BUSES

## Structure of new bus sales in Russia in 3 months 2026 by Federal District



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