Zero-emission trucks in Europe—the road so far

Analysis 2022–2025

13/03/2026

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Scope and definitions

Geographical scope:

- EU26 (excl. Malta) and EEA
- EEA: Norway and Iceland

Definitions

- Electric / e-truck: battery-electric or fuel cell electric truck
- ICE: internal combustion engine

Data source:

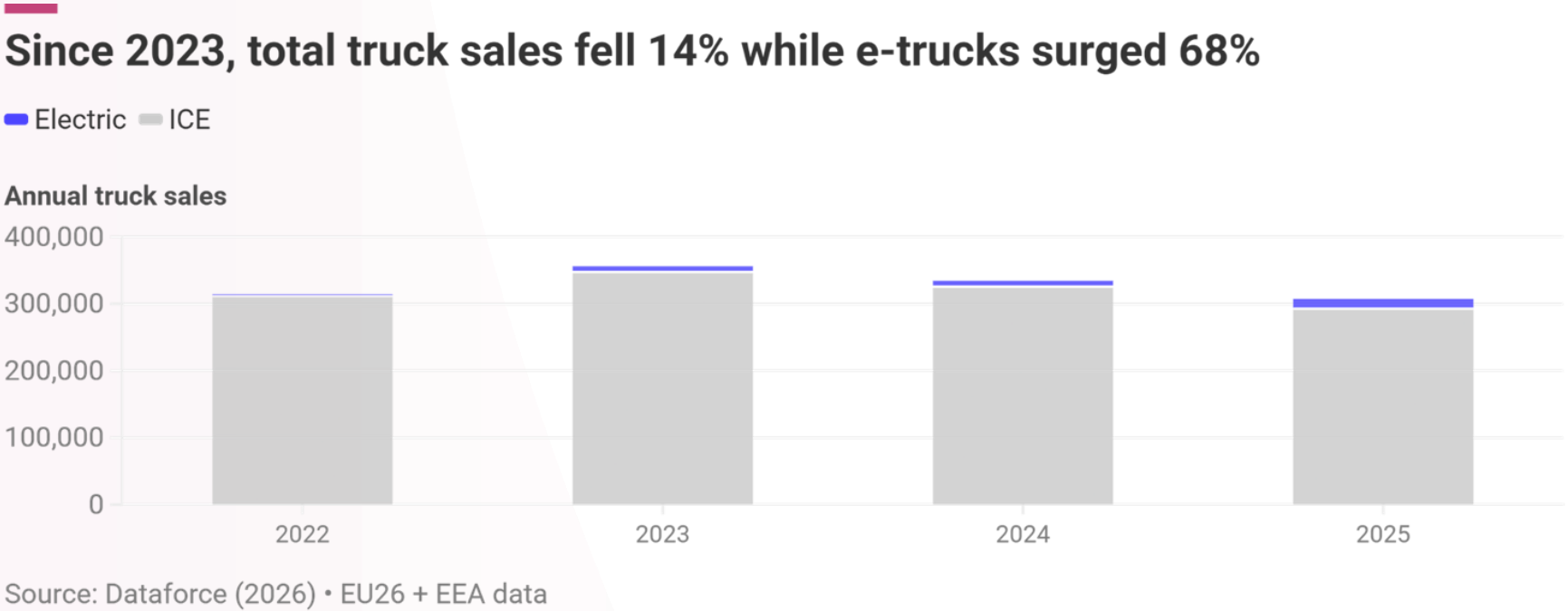
Dataforce (2026) Registrations of new commercial vehicles 2022–2025.

Weight categories:

- Light truck: gross vehicle weight (GVW) under 7 tonnes
- Medium truck: between 7 and 12 tonnes
- Heavy truck: over 12 tonnes
- Unless otherwise specified, all truck weight categories are included

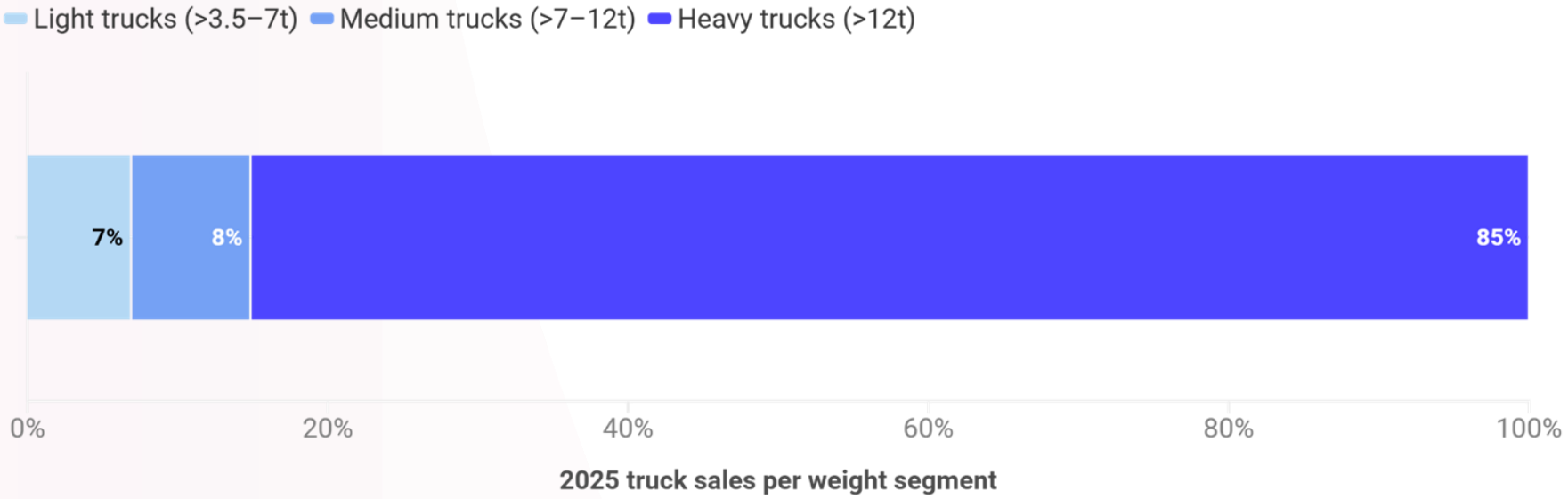
How is the European e-truck market developing?

E-truck sales gained momentum while demand for diesel trucks declined



Heavy trucks dominate the European market

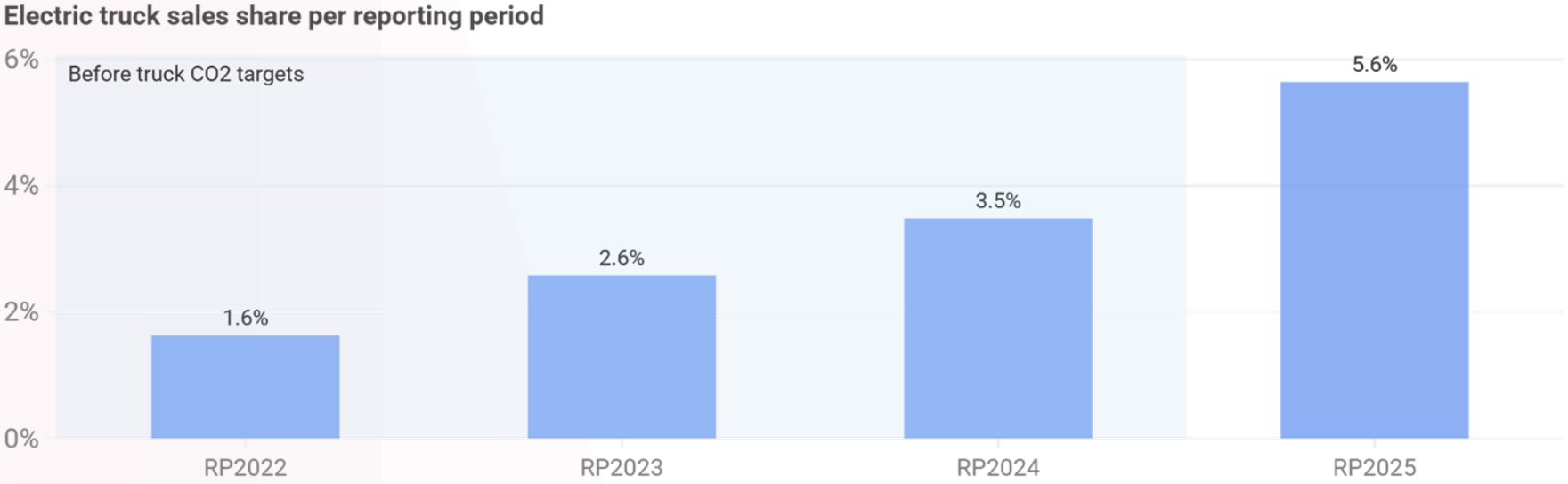
85% of new trucks are above 12 tonnes



Source: Dataforce (2026) • EU26 + EEA

European truck CO_2 targets drive electric sales

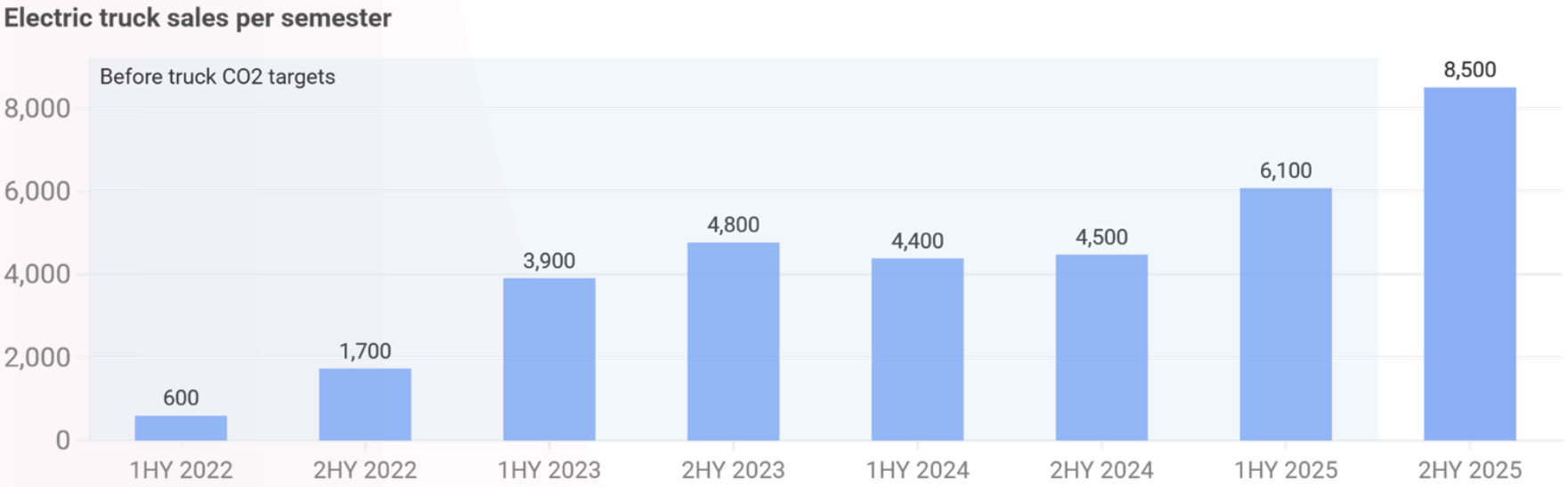
E-truck sales surged in H2 2025 as first truck CO2 target kicked in



Source: Dataforce (2026) • EU26 + EEA. RP = Reporting period from July 1st to June 30th

Truck CO_2 standards drive electric market

Electric sales post 2025 CO2 target make up 25% of all e-trucks since 2022

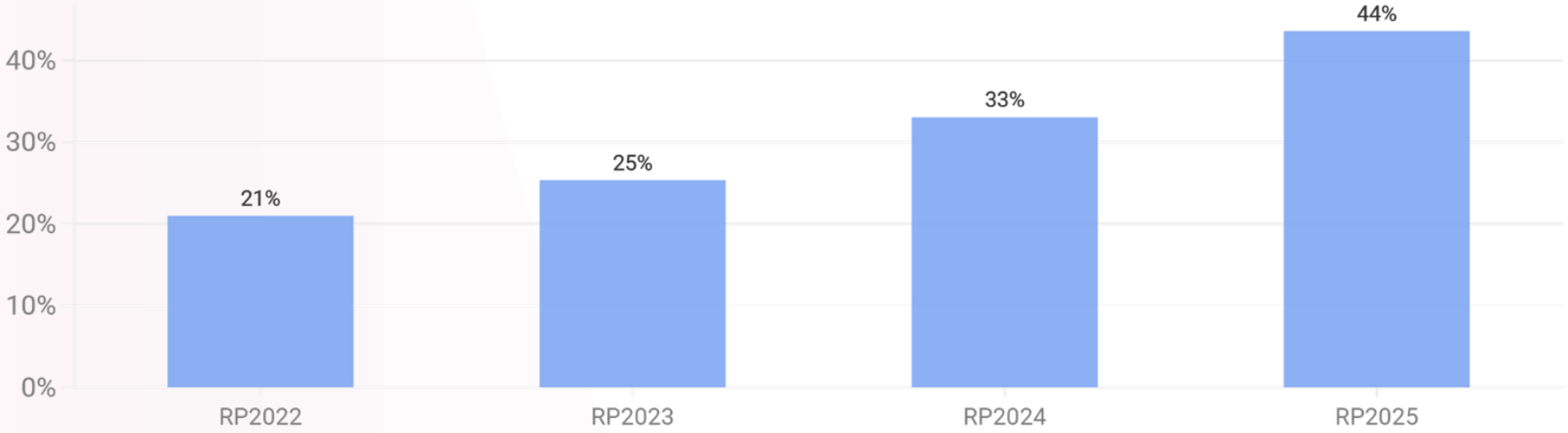


Source: Dataforce (2026) • EU26 + EEA

More than 40% of new light trucks in Europe are electric

Demand drives light truck electrification

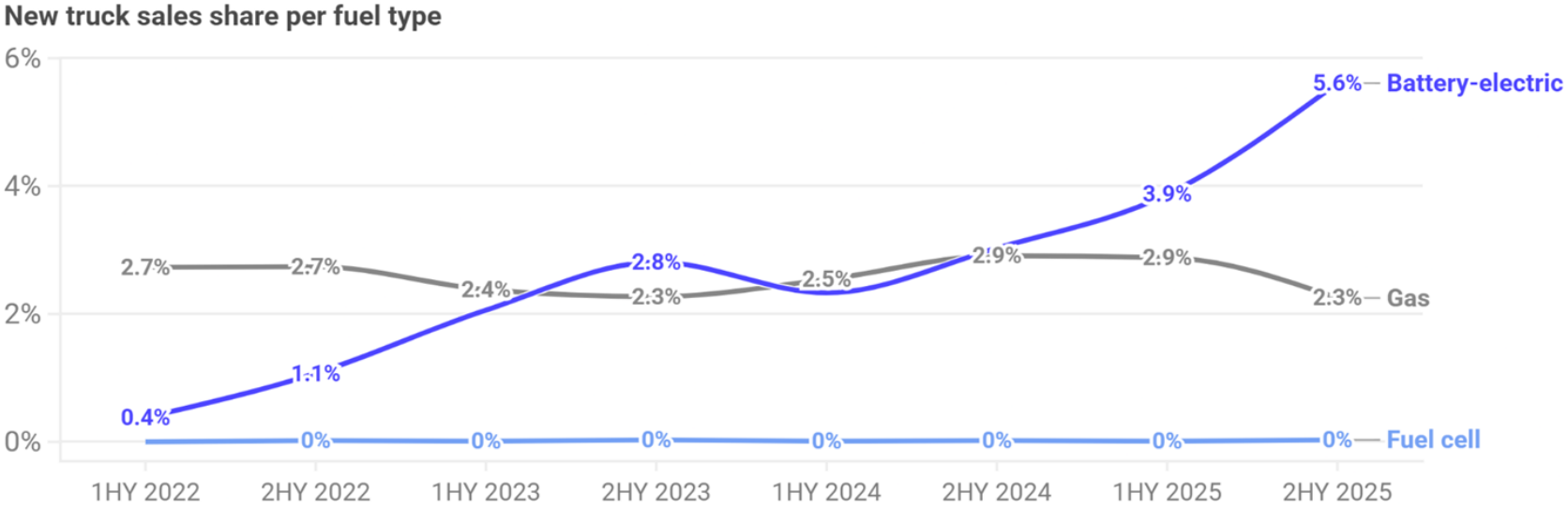
Electric light truck sales share per reporting period



Source: Dataforce (2026) • EU26 + EEA. Light trucks: 3.5–7t.

E-trucks are the dominant clean technology

E-trucks are more popular than gas trucks

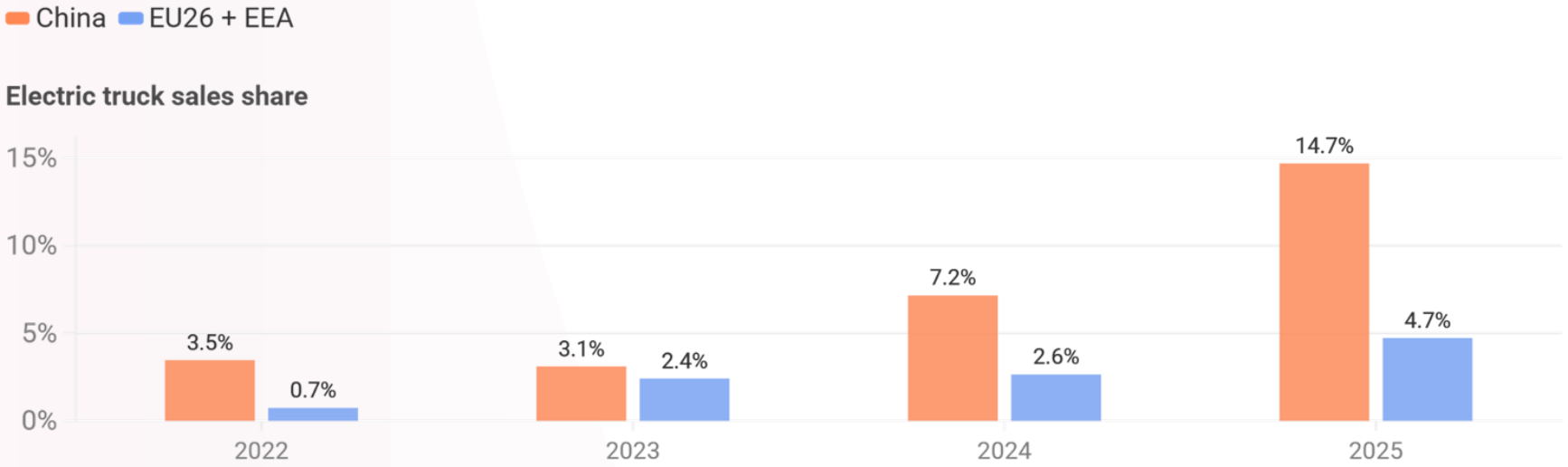


Source: Dataforce (2026) • EU26 + EEA

China is speeding ahead on electric

15% of new trucks in China are electric, compared to 5% in Europe

Seven times more e-trucks were sold in China in 2022–25 than in EU+EEA



Sources: Dataforce (2026), BloombergNEF (2026) • Chinese registration data up to October 2025

Key findings

1 **Tipping point:** driven by EU truck CO_2 targets, e-trucks are reaching almost **6% market share** in H2 2025. One in four e-trucks registered between 2022 -2025, were sold in H2 2025

2 **Demand for gas trucks stagnates:** e-trucks have overtaken gas vehicles with a market share that is double as high

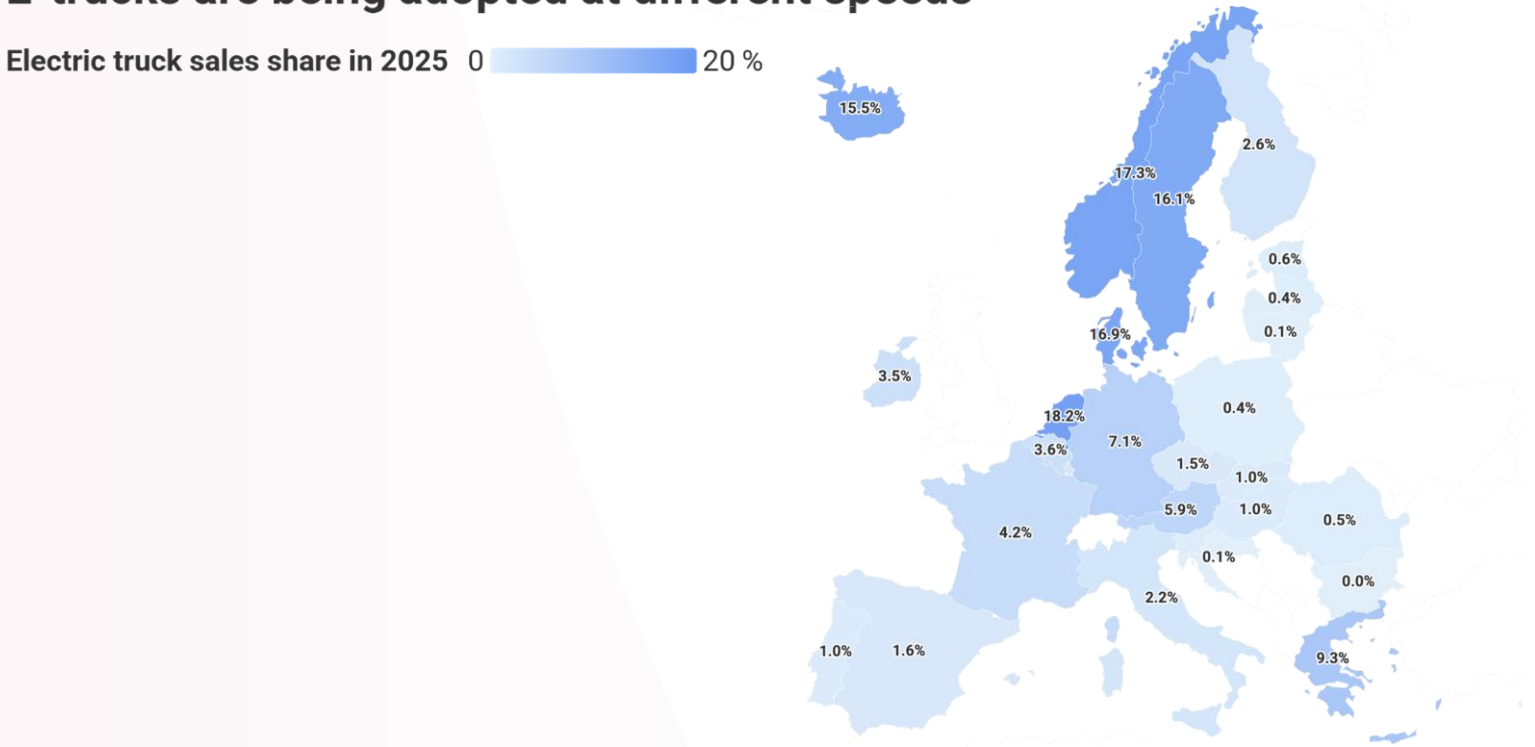
3 **Hydrogen reality check:** fuel cell trucks remain a niche technology with a market share of less than 0.1%

4 **The competitiveness risk:** European truckmakers must accelerate or risk losing the technology race as China is two to three years ahead in terms of e-truck uptake

Zooming in on different EU countries

Nordics and Netherlands lead the way

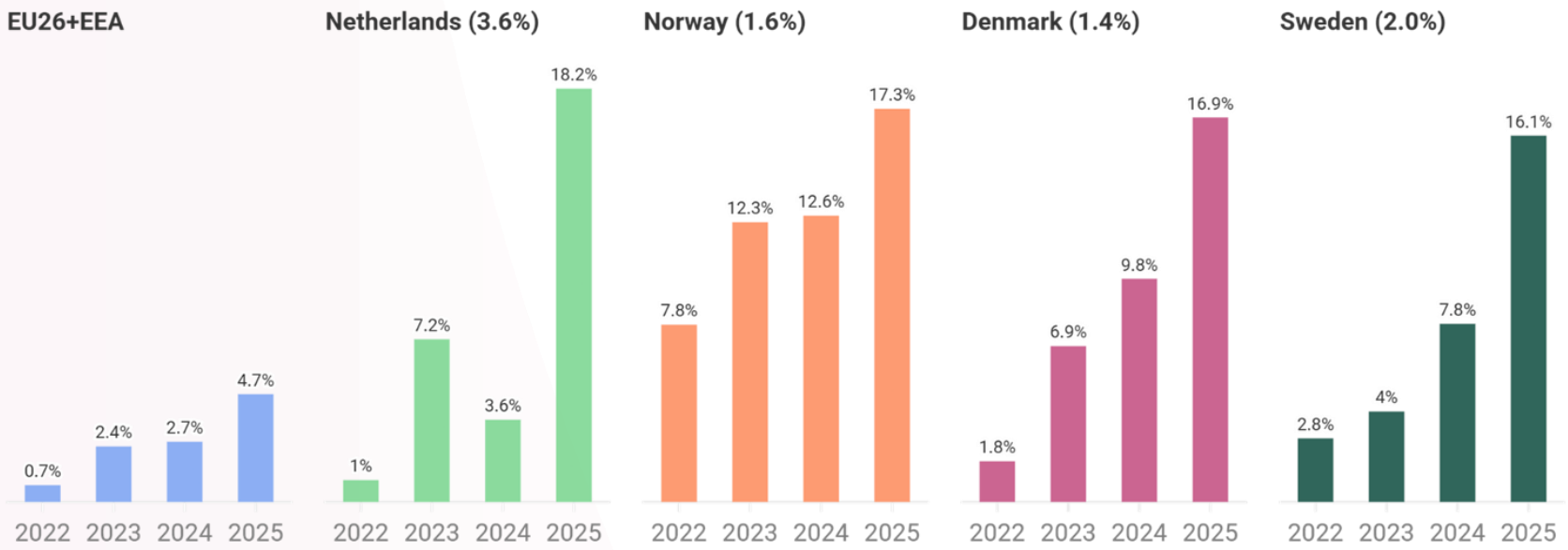
E-trucks are being adopted at different speeds



European frontrunners are keeping pace with China

Frontrunners already reach over 15% e-truck sales

Electric truck sales share

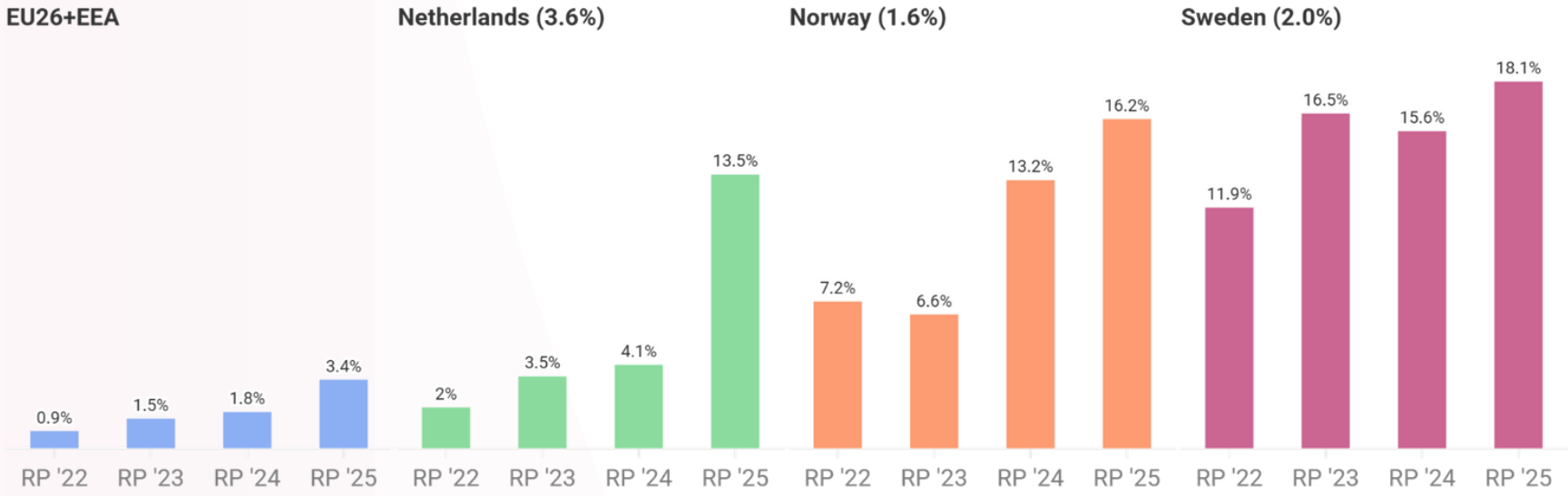


Source: Dataforce (2026) • Brackets include the country share of 2025 EU26+EEA truck sales

Frontrunners also show high demand for heavy e-trucks

Frontrunners are leading the way on electrifying heavy e-trucks too

Electric regulated truck sales share

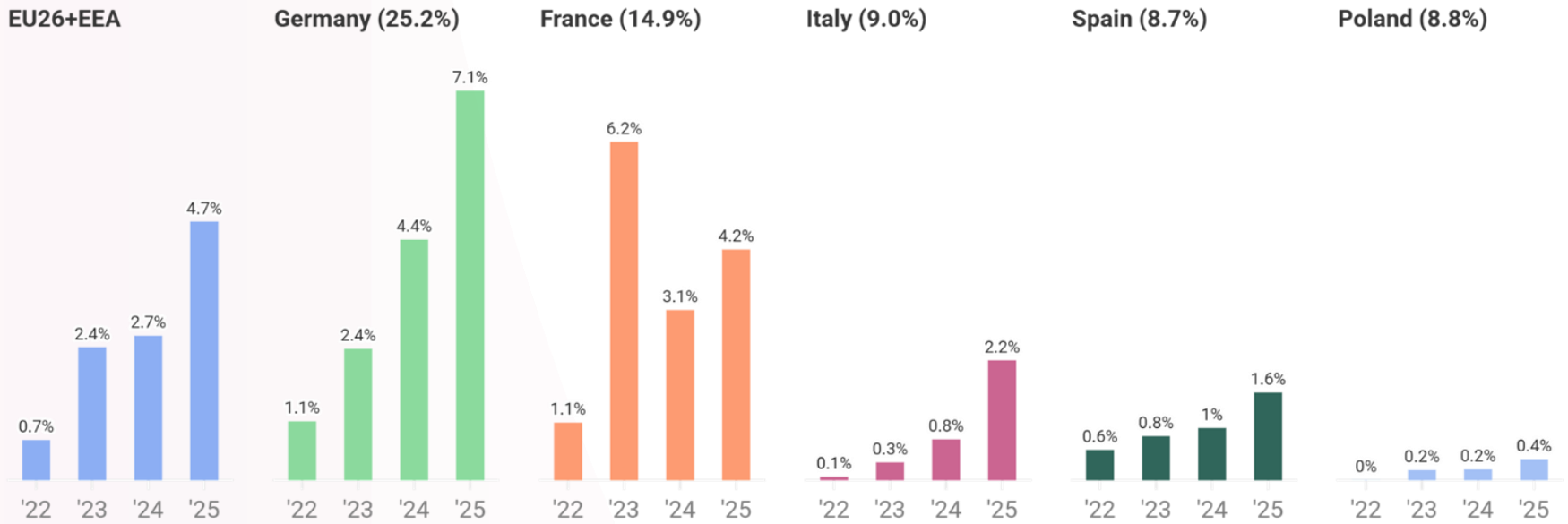


Source: Dataforce (2026) • RP = Reporting period. Regulated vehicle groups 4, 5, 9, 10. No data for Denmark. Brackets include the country share of 2025 EU26+EEA truck sales

Europe’s biggest truck markets: a mixed picture

Germany is the only major truck market with e-truck sales above the EU average

Electric truck sales share



Source: Dataforce (2026) • Brackets include the country share of 2025 EU26+EEA truck sales

Policy measures to enable the full e-truck potential, an overview

Policy measures to accelerate e-truck uptake

Policy measures	Netherlands	Sweden	Denmark	Germany	France	Spain	Italy	Poland
Purchase subsidy (% of price or €/truck)	Up to €115,200	Up to 25%	Up to 50% of the extra cost Funding until 30/09/2026	Phased-out	Up to €53,000	Under discussion	Under discussion	Up to PLN 750,000 (€178,000)
Subsidy for depot charging	€400–€88,000 per unit	Up to 50% of investment costs	Up to 40% of investment costs	New scheme expected in Q2 2026	Up to €15,000 per charger Up to €960,000 for large depot hubs	None	None	New scheme expected in Q3 2026
CO_2-based road tolls (EU Eurovignette Directive)	~80% discount for e-trucks as of 07/2026	75% discount for e-trucks (time-based)	>85% discount for e-trucks	100% discount for e-trucks until 30/06/31 + €200/tCO_2 surcharge	No discount for e-trucks	No discount for e-trucks	No discount for e-trucks	Not transposed No discount for e-trucks

Policy measures to accelerate e-truck uptake

Policy measures	Netherlands	Sweden	Denmark	Germany	France	Spain	Italy	Poland
Transposition of EU Renewable Energy Directive III into national legislation* (energy credits)	Public & private charging	Public charging only	Public charging only	Public & private charging	Public charging only	Public from 2027	Public from 2027	Slow progress
Transposition of ETS2 into national legislation (start as of 2028)	Yes	Yes	Yes	Yes (Until then: national CO_2 price for transport)	No	No	Yes	No
Zero-emission freight zones (ZEZ)	19 ZEZs active	None	None	None	None	None	None	None

* Fleet operators generate tradable e-credits by metering renewable energy used in private depots and can sell them to fuel suppliers who have to comply with mandatory carbon reduction targets

How are truckmakers performing?

Background

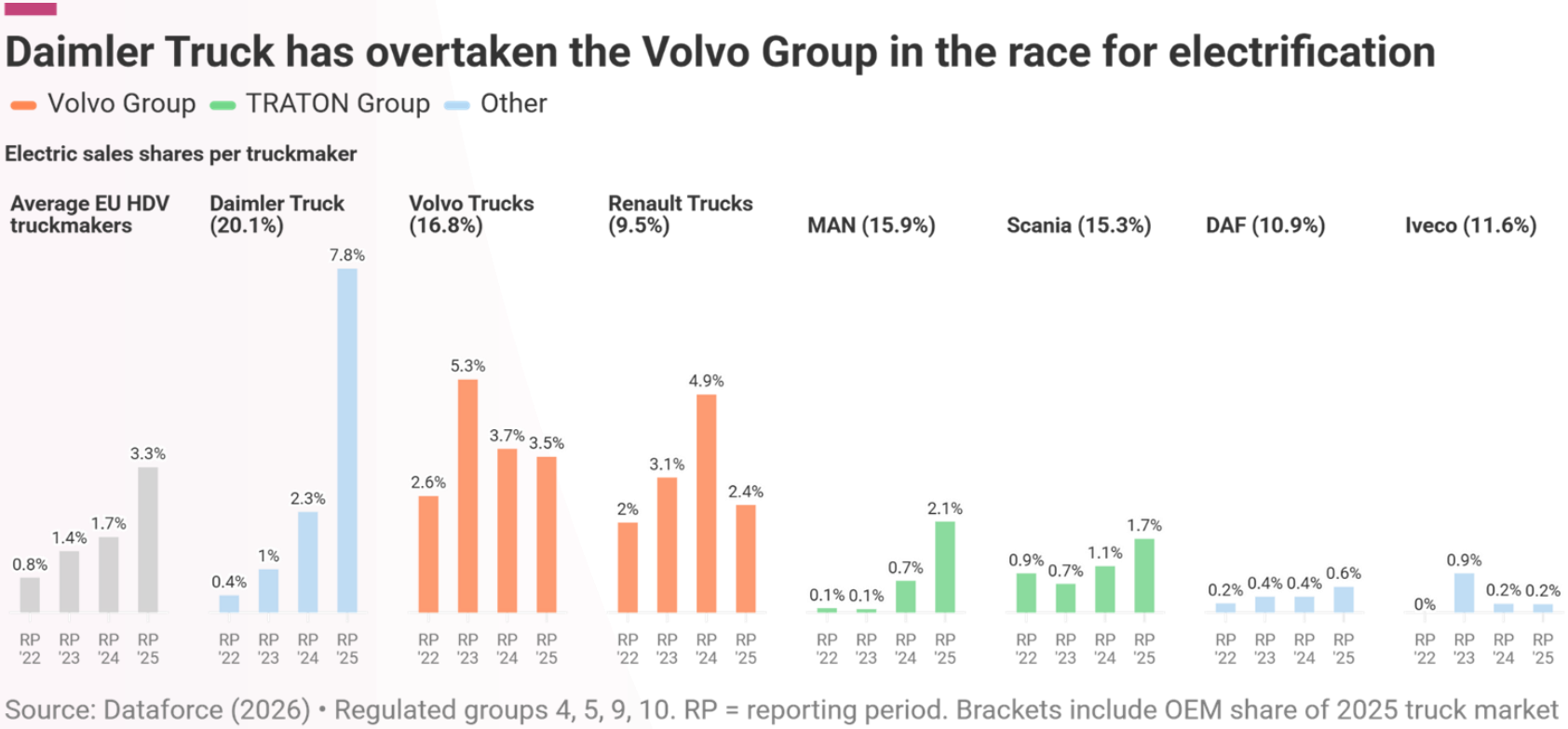
Under EU CO_2 standards, truckmakers must reduce fleet emissions by **15%** for the 2025–2029 period (vs. 2019). Annual **reporting periods** (RP) run from July 1st to June 30th of the next year.

Prior to RP 2025, a "banking" period allowed manufacturers to earn credits from early e-truck sales to help meet the 2025 target.

Additionally, the zero- and low-emission vehicle (**ZLEV**) **incentive mechanism** allows manufacturers to lower their fleet average by selling zero-emission vehicles in unregulated segments (i.e. light and medium trucks). This acts as a "bonus" multiplier, providing a ZLEV factor that can reduce a truckmaker's emissions by up to 3%.

The following charts focus on the main regulated groups—**VECTO 4, 5, 9, and 10**—representing heavy trucks (>16t) which dominate EU+EEA roads.

Most truckmakers boosted e-truck sales in 2025

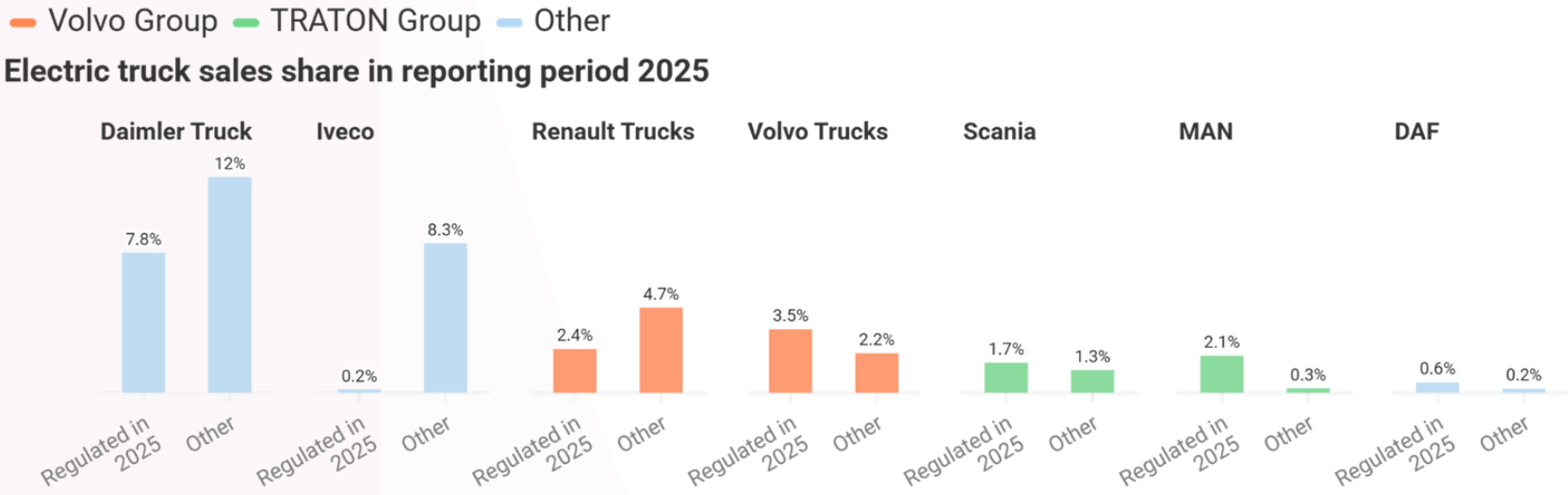


Source: Dataforce (2026) • Regulated groups 4, 5, 9, 10. RP = reporting period. Brackets include OEM share of 2025 truck market

Manufacturers electrify different truck groups first

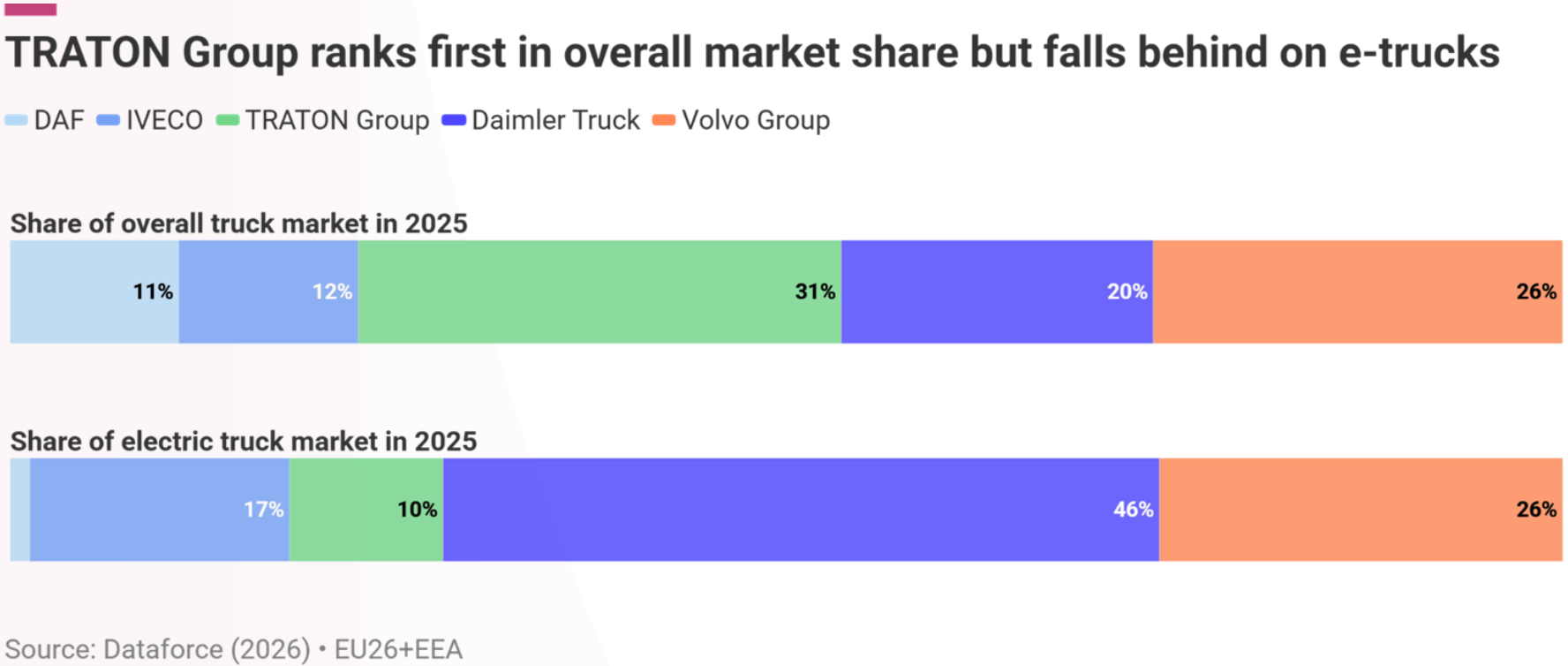
Daimler Truck leads on electrifying both regulated and unregulated trucks

Whereas IVECO ranks second in light e-trucks, but is last to electrify regulated trucks



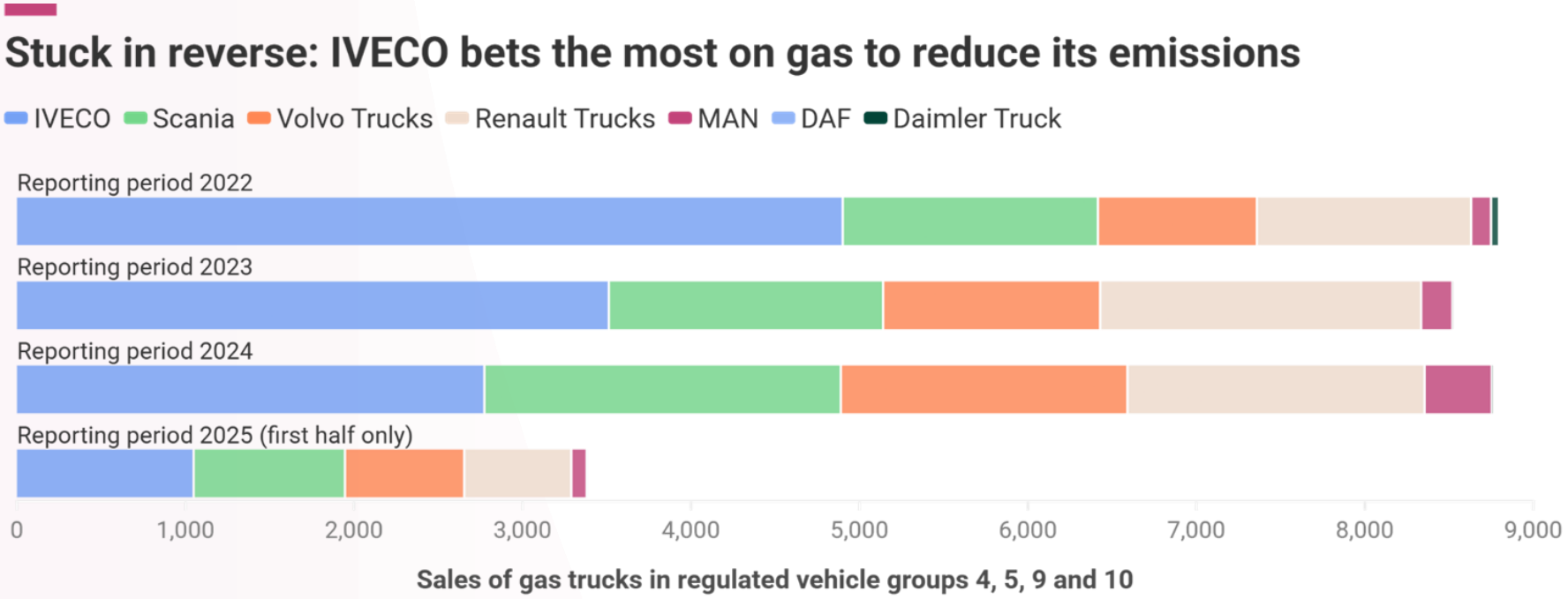
Source: Dataforce (2026) • Regulated in 2025 = vehicle groups 4, 5, 9, and 10.

Largest manufacturers are not the e-truck leaders



Source: Dataforce (2026) • EU26+EEA

Four truckmakers still heavily investing in gas engines



Source: Dataforce (2026)

A closer look at the different truckmakers

VOLVO
Volvo Group

Volvo Trucks | Renault Trucks

- The group banked emissions credits in 2022–2024 thanks to high e-truck sales, which should help the group overachieve its 2025 CO_2 target
- Both Volvo Trucks and Renault Trucks are set to start taking orders for e-tractors with up to 600 km range from Q2 2026

IVECO

- IVECO has so far prioritised electrifying its lighter models, preferring gas to reduce the emissions of its regulated sales
- The company now plans on starting deliveries of the IVECO S-eWay Artic in 2026, its long-haul e-tractor with up to 600 km range

DAIMLER TRUCK

- Daimler Truck successfully ramped up sales of its eActros 600 in H2 2025 as the CO_2 target kicked in, challenging Volvo Group for market leadership
- The company still bets on fuel cell technology for long-haul in the long-term, despite delaying series production of its liquid-hydrogen GenH2 truck to early 2030s

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A closer look at the different truckmakers

TRATON GROUP Scania | MAN

- TRATON Group is slower to electrify than Daimler Truck or Volvo Group, despite being the largest European truckmaker
- Scania should comfortably reach its 2025 CO_2 target, as it has banked the most emission credits since 2019, primarily through efficiency improvements of diesel trucks
- MAN's electric sales have picked up momentum in 2025 as series production of the eTGX and eTGS began in Munich in June

DAF

- DAF remains slow to shift to electric trucks, having so far relied mainly on vehicle efficiency to comply with the 2025 target
- In September 2025, DAF launched series production of its new generation of DAF XD and XF Electric, with ranges up to 500 km

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Further information:

Dr. Nils Hooftman
Senior Policy Advisor on Zero-Emission Trucks
T&E

nils.hooftman@transportenvironment.org