

# 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

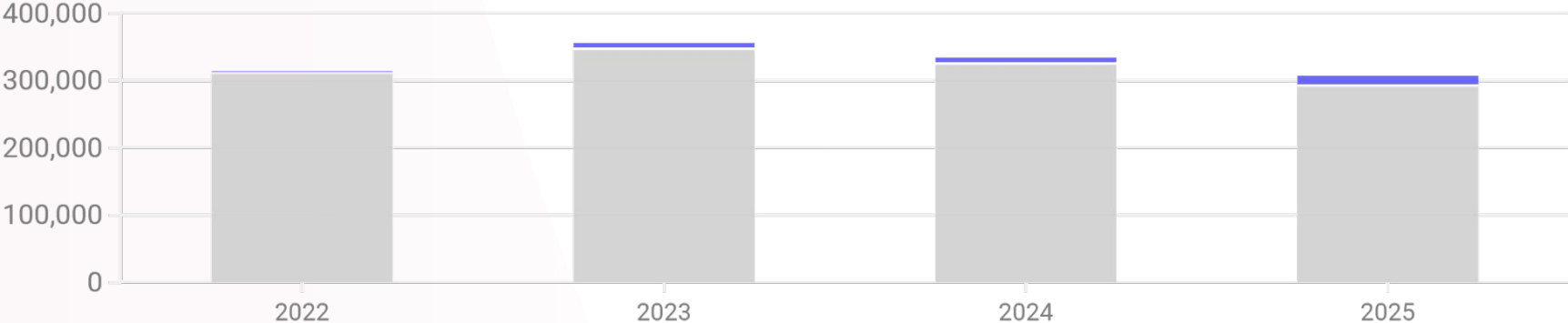
# How is the European e-truck market developing?

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

Since 2023, total truck sales fell 14% while e-trucks surged 68%

Electric ICE

Annual truck sales

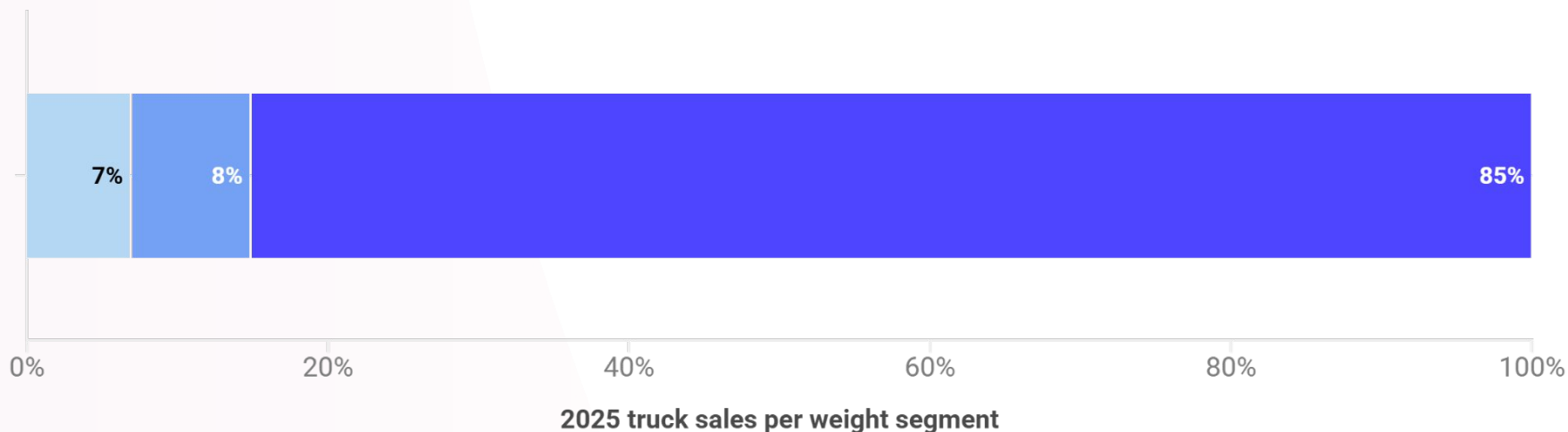


Source: Dataforce (2026) • EU26 + EEA data

# Heavy trucks dominate the European market

85% of new trucks are above 12 tonnes

Light trucks (>3.5–7t) Medium trucks (>7–12t) Heavy trucks (>12t)

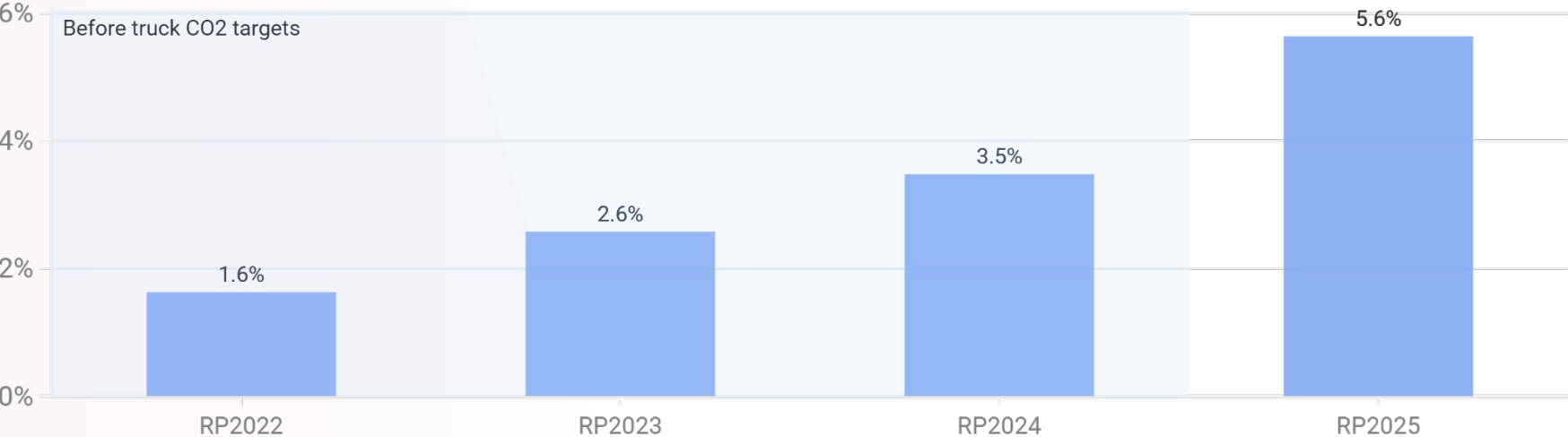


Source: Dataforce (2026) • EU26 + EEA

# European truck CO<sub>2</sub> targets drive electric sales

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

Electric truck sales share per reporting period

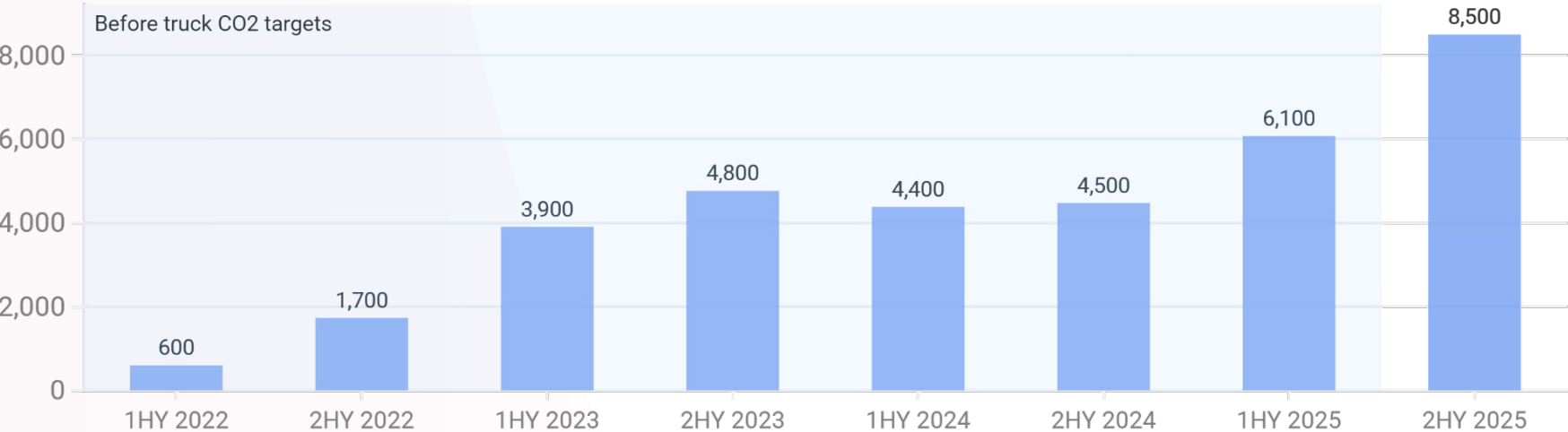


Source: Dataforce (2026) • EU26 + EEA. RP = Reporting period from July 1st to June 30th

# Truck CO<sub>2</sub> standards drive electric market

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

Electric truck sales per semester

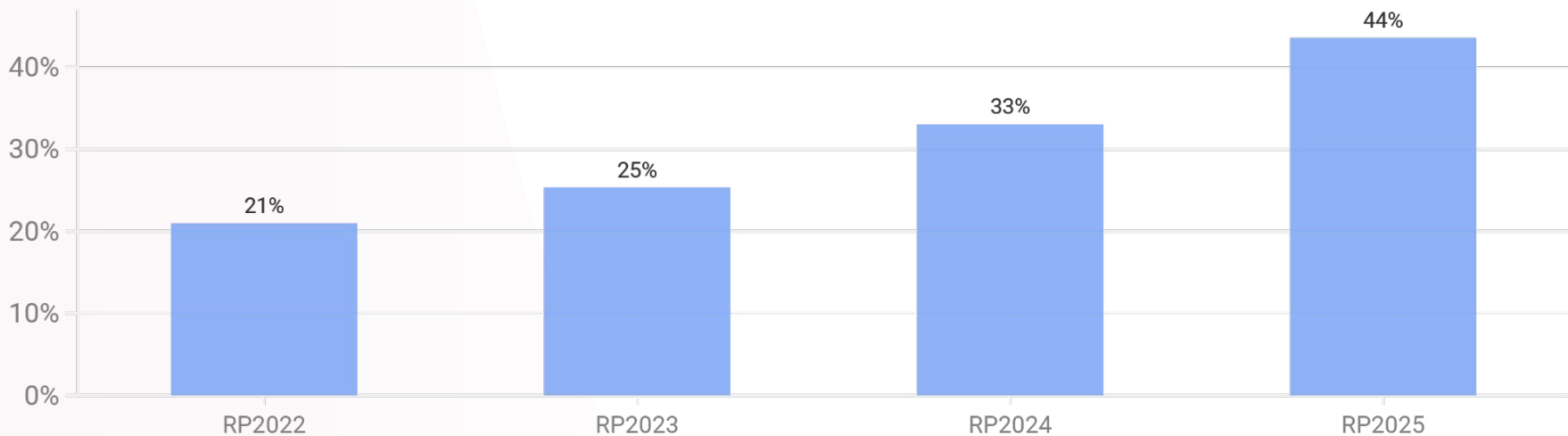


Source: Dataforce (2026) • EU26 + EEA

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

## Demand drives light truck electrification

Electric light truck sales share per reporting period

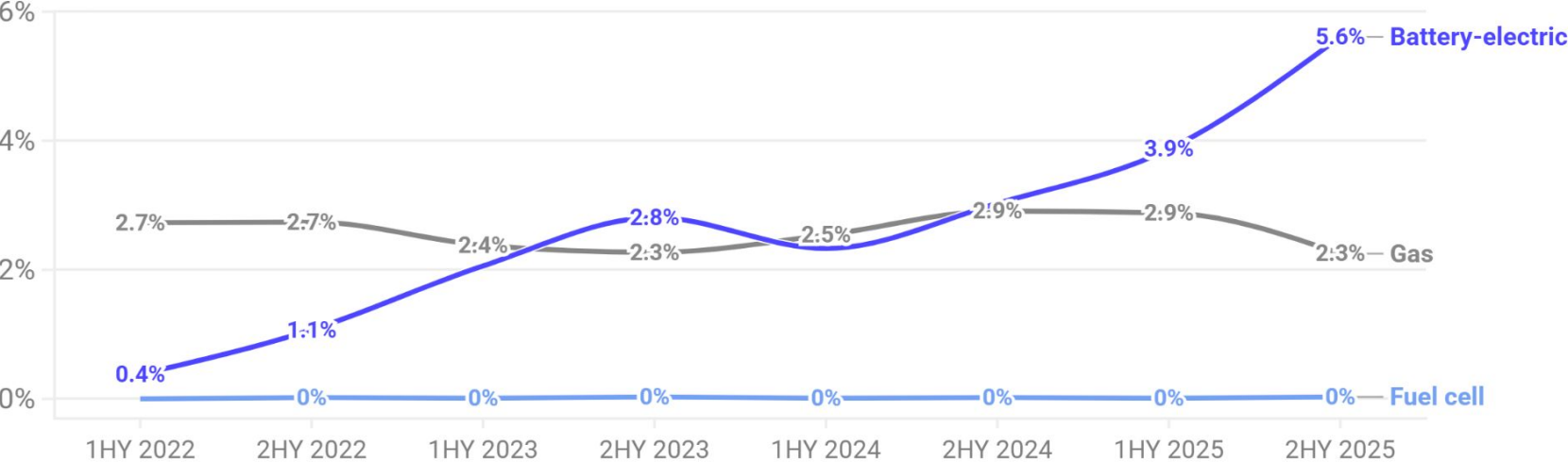


Source: Dataforce (2026) • EU26 + EEA. Light trucks: 3.5–7t.

# E-trucks are the dominant clean technology

## E-trucks are more popular than gas trucks

New truck sales share per fuel type



Source: Dataforce (2026) • EU26 + EEA

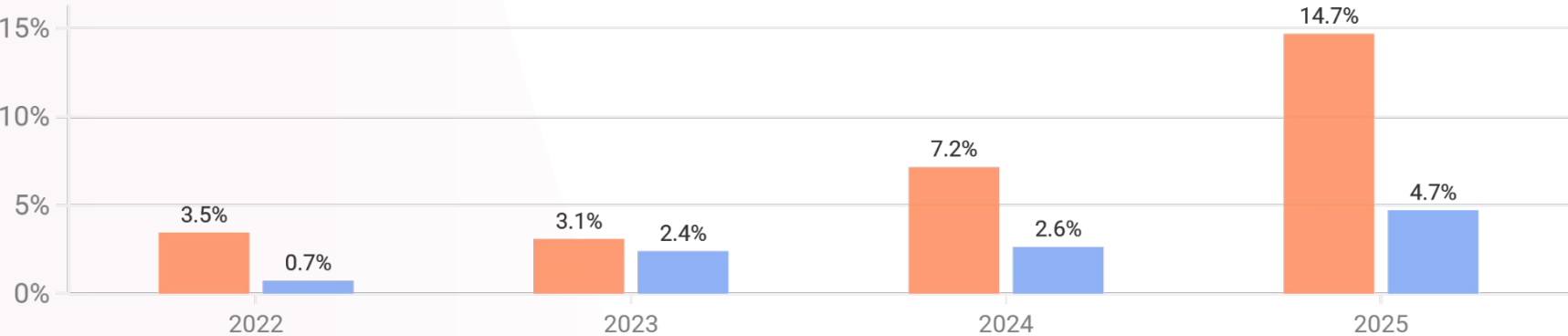
# China is speeding ahead on electric

## 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

China EU26 + EEA

Electric truck sales share



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

# Key findings

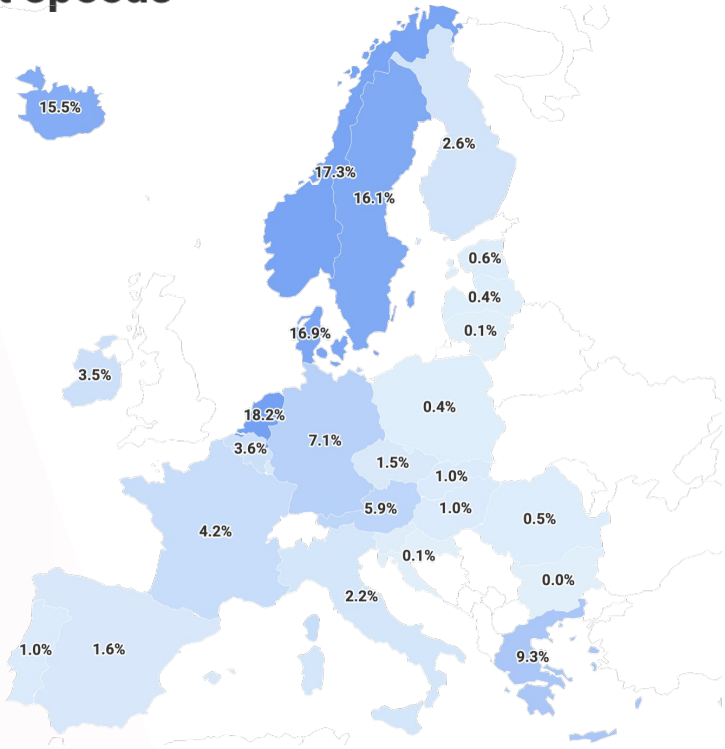
- 1 Tipping point:** driven by EU truck CO<sub>2</sub> targets, e-trucks are reaching almost **6% market share** in H2 2025. One in four e-trucks registered between 2022 -2025, were sold in H2 2025
- 2 Demand for gas trucks stagnates:** e-trucks have overtaken gas vehicles with a market share that is 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

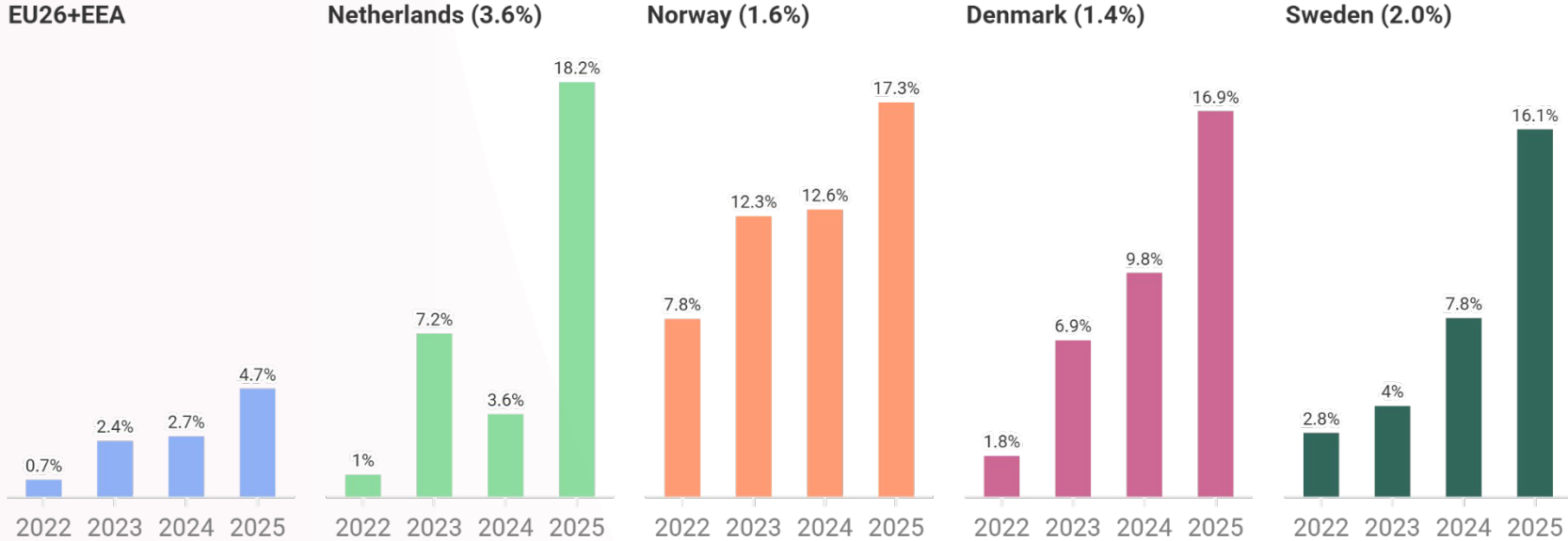
Electric truck sales share in 2025 0 20 %



# European frontrunners are keeping pace with China

## Frontrunners already reach over 15% e-truck sales

Electric truck sales share

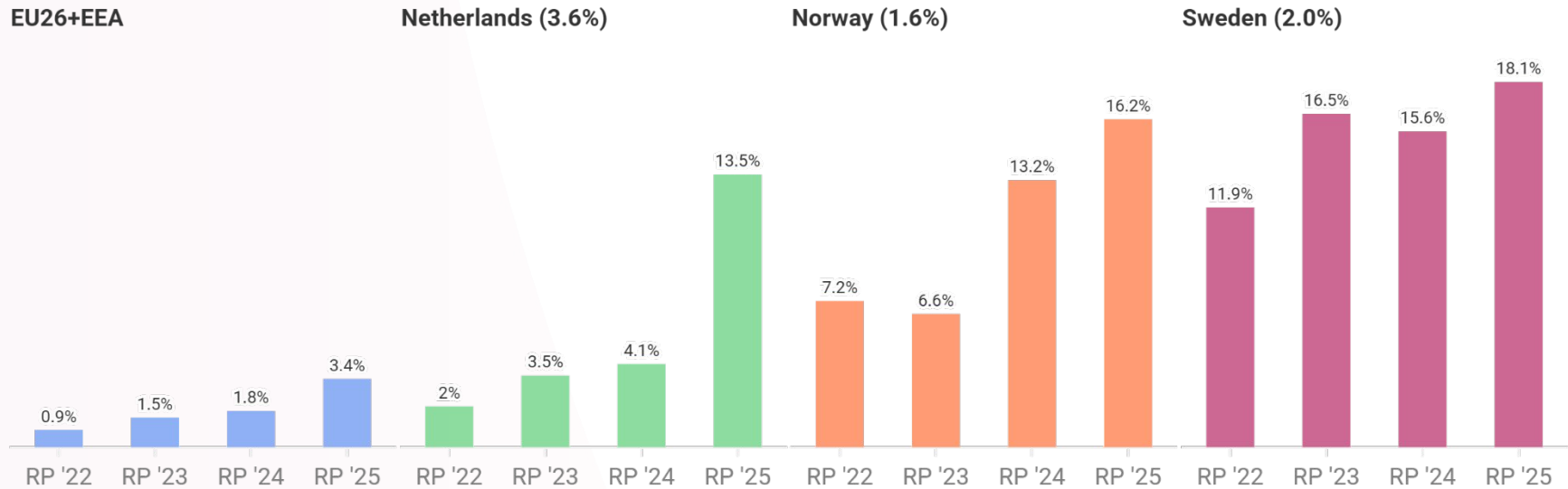


Source: Dataforce (2026) • Brackets include the country share of 2025 EU26+EEA truck sales

# 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



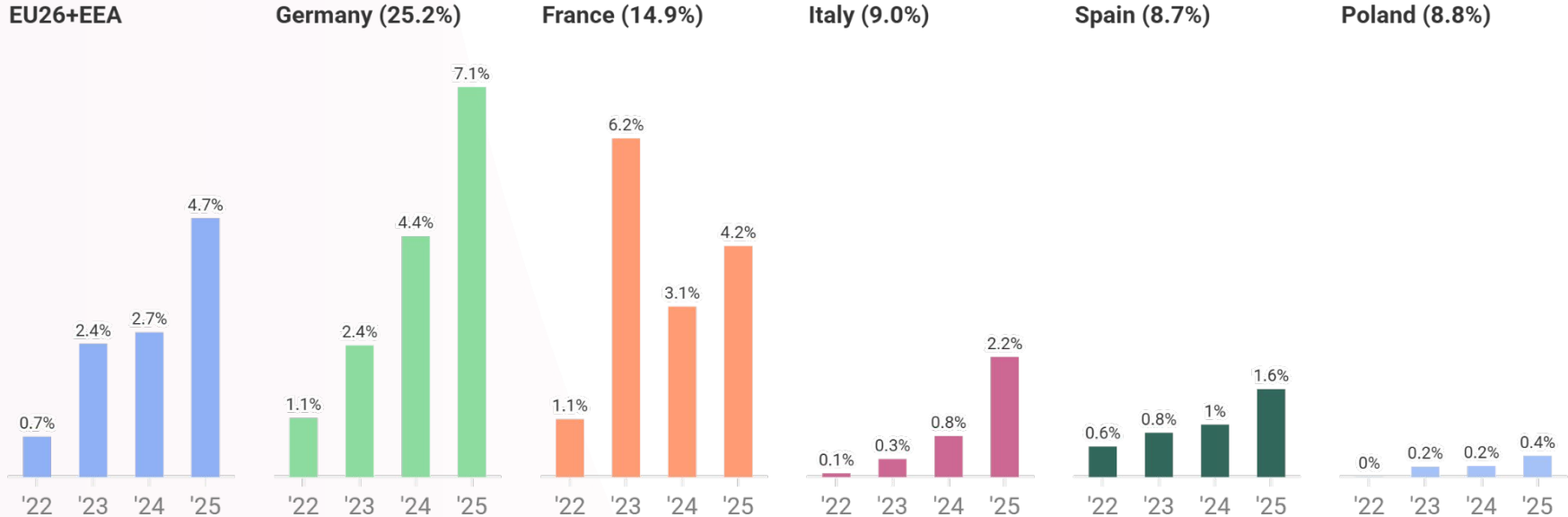
Source: Dataforce (2026) • RP = Reporting period. Regulated vehicle groups 4, 5, 9, 10. No data for Denmark. Brackets include the country share of 2025 EU26+EEA truck sales

# 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—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 <sub>2</sub> -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 <sub>2</sub> 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 <sub>2</sub> 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<sub>2</sub> 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%.

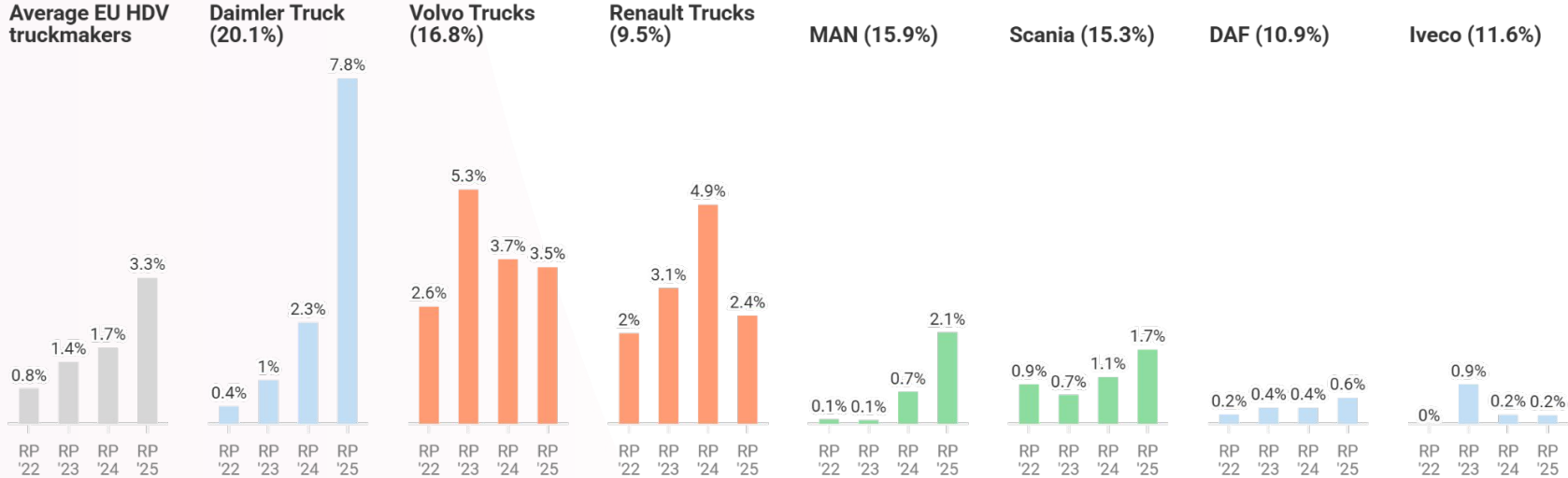
The following charts focus on the main regulated groups—**VECTO 4, 5, 9, and 10**—representing heavy trucks (>16t) which dominate EU+EEA roads.

# Most truckmakers boosted e-truck sales in 2025

## Daimler Truck has overtaken the Volvo Group in the race for electrification

Volvo Group TRATON Group Other

Electric sales shares per truckmaker



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

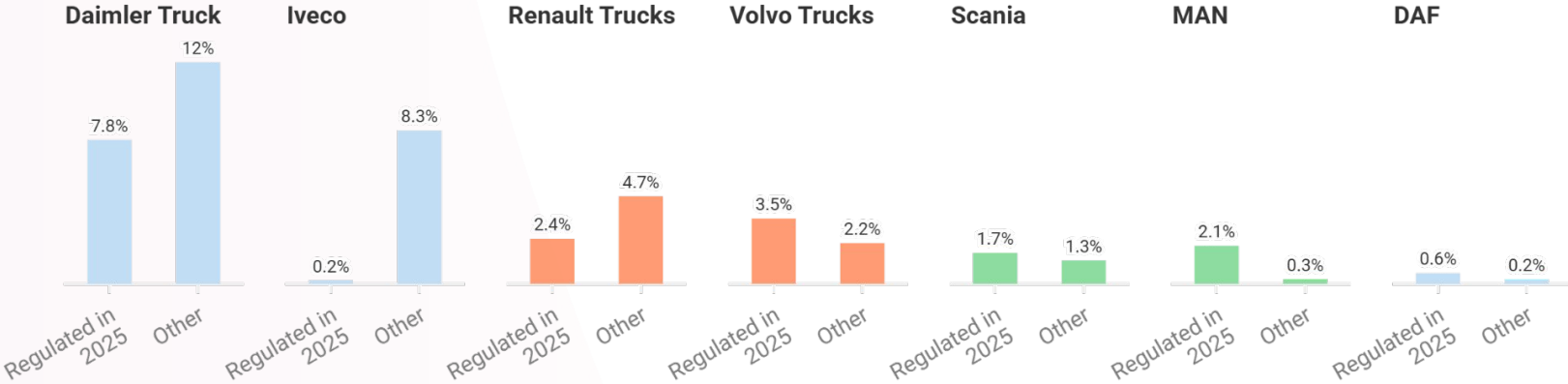
# Manufacturers electrify different truck groups first

## 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

Volvo Group   TRATON Group   Other

### Electric truck sales share in reporting period 2025



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

# Largest manufacturers are not the e-truck leaders

## TRATON Group ranks first in overall market share but falls behind on e-trucks

DAF IVECO TRATON Group Daimler Truck Volvo Group

Share of overall truck market in 2025



Share of electric truck market in 2025

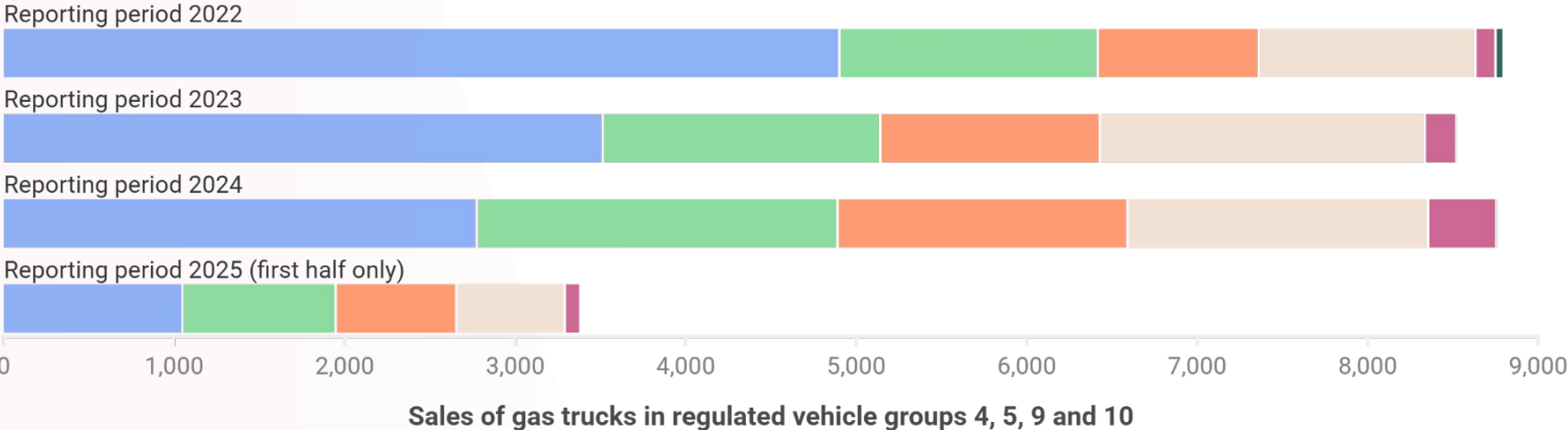


Source: Dataforce (2026) • EU26+EEA

# Four truckmakers still heavily investing in gas engines

## Stuck in reverse: IVECO bets the most on gas to reduce its emissions

IVECO Scania Volvo Trucks Renault Trucks MAN DAF Daimler Truck



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<sub>2</sub> 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<sub>2</sub> 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

# A closer look at the different truckmakers

## TRATON G R O U P 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<sub>2</sub> 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

## Further information:

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