



China remains by far the leading global market for zero-emission heavy-duty vehicles



GLOBAL STORY ON EV SHIFT WORTH A LOOK

The UK is still a global leader in moving to electric, but **world markets are changing**



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Prime Minister Andy Burnham's slew of major policy announcements at the recent Labour party conference included at least one that could prove significant for the UK's bus sector – and for the country's wider decarbonisation agenda.

Great British Grid aims to introduce competition to the privatised National Grid in the electricity distribution sector and help to unblock the queue of customers waiting for upgraded connections.

That queue includes several coach and bus operators, of course, some of which are finding their attempts to electrify fleets frustrated by the need to secure an adequate supply of electricity to their charging infrastructure.

We await more detail in order to assess the significance of this announcement, but it is at least a clear acknowledgement on the part of the government of the

need for step-change on progress in terms of upgrading the UK's electricity grid.

It is always illuminating to read the work of the excellent International Council on Clean Transportation (ICCT). In late summer, ICCT published its latest report on global progress in the uptake of electric buses and trucks, alongside an interactive tool that enables easy comparison between countries.

The report shows how rapidly things are changing at a global level. Progress on battery technology and electric vehicle manufacturing has driven down costs and brought new buses, (some) coaches and trucks to market that are rivalling – and in many cases already beating – their internal combustion engine equivalents on total cost of ownership.

Increasingly, sales of electric trucks (medium- and heavy-duty vehicles) are outpacing those of electric coaches and buses. In 2020, coach and bus represented 80% of zero-emission combined medium- and

heavy-duty vehicle (ZE-MHDV) sales, reflecting the early concentration of electrification.

By 2022, the truck proportion of ZE-MHDV sales had exceeded bus for the first time, and by 2025 trucks accounted for 86% of ZE-MHDV sales with buses and coaches representing just 14%.

ICCT's report, which includes complete data to the end of 2025, shows that global electric bus and truck sales reached 500,000 units. Growth was dominated by China's very rapid expansion in sales of electric trucks. Battery-electric buses comprised 17% of total global bus sales.

In 2025, China's zero-emission coach and bus market reached 50,500 units, close to 30% of all sales, with almost 100% of new city buses being zero emission.

Although China has been the stand-out territory, accounting for nearly 90% of global new electric bus and truck registrations, sales were also strong across major markets in 2025 with the EU, India, Brazil and the UK all recording double-digit increases, fuelled mostly by the expansion of electric bus sales.

The UK's ongoing progress in electrifying its ZE-MHDV

market has been dominated by success in the bus sector. The UK registered 3,609 ZE-MHDVs in 2025, representing 7.3% of the combined market, ahead of the European average of 6.9%

In 2025, the UK registered 2,932 zero-emission coaches and buses, over 30% of that total market (based on Society of Motor Manufacturers and Traders data). Wrightbus held the highest market share of zero-emission buses sold in the UK, at 28%.

Overall, ICCT's report shows that the world's automotive sector is electrifying rapidly, and not only in the bus and passenger car markets, which were quickest out of the blocks.

Hopefully, the government's commitment to transform the UK's electricity grid will be one of the keys to ensuring that the UK remains among the leaders in road transport's global electric transition.

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For more about Zemo's work supporting the coach and bus transition, or to find out about membership, visit www.zemo.org.uk

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