

Global and European Garbage Truck Market Outlook 2025–2035

Global Garbage Truck Market Set for Strong Growth, Reaching USD 24.8 Billion by 2035 Amid Rapid Fleet Electrification and Smart Waste Collection Upgrades

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EINPresswire.com/ -- The global [garbage truck market](#) is entering a decisive growth phase driven by electrification, automation, and

increasing municipal investments in sustainable waste collection systems. According to the latest industry assessment, the market is valued at USD 15.9 billion in 2025 and projected to reach USD 24.8 billion by 2035, expanding at a CAGR of 4.5% over the forecast period.

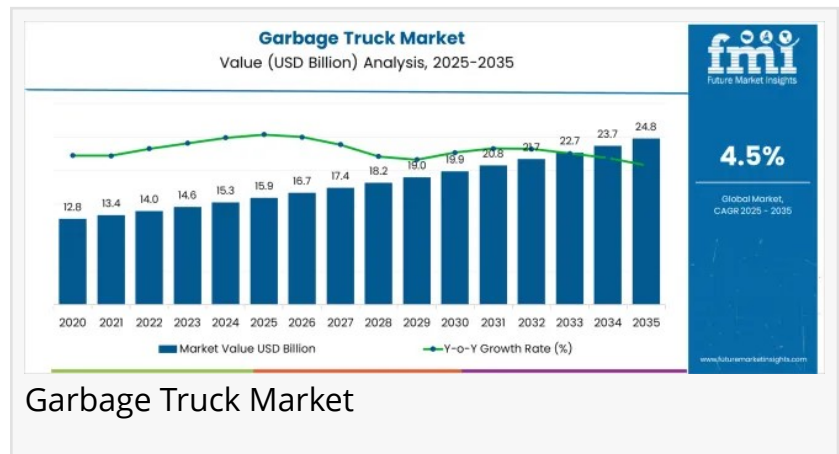
This growth trajectory represents a market expansion multiplier of 1.56 and reflects a structurally stable yet increasingly technology-enhanced sector. The market is set to generate approximately USD 3.9 billion in new value by 2030 and an additional USD 5.0 billion between 2030 and 2035. The latter half of the decade is expected to exhibit a slightly steeper demand curve as municipalities accelerate fleet modernization and integrate automated side-loader systems across collection networks.

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Electrification, Automation, and Regulatory Pressures Reshape Fleet Investments

Manufacturers such as Heil Environmental and McNeilus Truck and Manufacturing are launching electric garbage trucks equipped with low-noise propulsion, regenerative braking, smart compaction systems, and advanced hydraulic controls. These innovations coincide with rising demand for low-emission municipal fleets, fueled by government incentives, clean air regulations, and landfill diversion targets.

IoT-enabled sensors and AI-powered route optimization software are becoming standard across



new procurements. By reducing fuel consumption, minimizing collection delays, and enabling dynamic rerouting, connected garbage trucks are significantly improving operational efficiency. Autonomous and semi-autonomous loading mechanisms, robotic arms, and operator-assist features are further transforming the sector by increasing safety and decreasing manual labor dependency.

Hydrogen fuel cell development is gaining momentum in regions investing in clean hydrogen infrastructure, with pilot models already deployed in parts of North America and Europe.

A Foundational Segment of Global Waste Management Infrastructure

Garbage trucks represent nearly half of the global waste management equipment sector, holding approximately 48% market share due to their essential role in residential and industrial waste collection. The sector also contributes 42% to the municipal utility vehicles market and about 36% to the environmental services and sanitation category.

Urban infrastructure authorities continue to rely heavily on rear, front, and side loader trucks for routine sanitation operations. Roughly 18% of the global commercial vehicles category is connected to garbage trucks, driven by long-term private waste management contracts and sustained municipal demand.

Rear Loaders Lead the Market, Electric Trucks Gain Traction

Among truck types, rear loaders dominate with a 39.7% share in 2025. Their ability to navigate narrow streets, handle mixed waste streams, and operate efficiently in densely populated zones makes them indispensable for most municipalities. Continuous improvements in compaction ratios, worker safety features, and ergonomic control systems support their sustained adoption.

Electric garbage trucks account for 36.1% of the fuel segment—one of the fastest-growing categories. Their lower operating costs, minimal noise, and qualification for environmental subsidies are accelerating their deployment. With rapid advancements in battery density and charging speeds, the electric segment is expected to expand sharply through 2030 and beyond, particularly in regions enforcing low-emission zones.

Despite rising automation, manual technology systems continue to hold a 41.4% market share. Cost-efficient operation, ease of maintenance, and adaptability to diverse collection conditions ensure their continued relevance, especially in developing and budget-constrained regions.

Global Market Drivers: Waste Volume Surge, Smart City Investments, and Fleet Renewal Cycles

Rising municipal and industrial waste volumes remain the primary market catalyst. A 2024 United Nations projection of escalating global waste generation has triggered larger

procurement cycles, prompting operators to adopt high-capacity trucks with advanced compaction capabilities.

Smart city policies are accelerating integration of telematics and digital fleet monitoring systems, allowing real-time route updates, fuel optimization, and performance tracking. Replacement of aging diesel fleets, tightening emissions rules, and government incentives for electric and low-carbon fleets are expected to further drive market expansion.

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Regional Outlook: Strong Momentum in Asia Pacific, Steady Upgrades in Europe and North America

Asia Pacific leads global growth, with China (6.1% CAGR) and India (5.6% CAGR) emerging as high-potential markets due to rapid urbanization, rising waste volumes, and aggressive adoption of electric and CNG-powered garbage trucks. China is solidifying its position as a global innovation hub, integrating AI-assisted routing and exporting competitively priced models to Southeast Asia.

Europe maintains strong adoption trends, with Germany (5.2% CAGR) and France (4.7% CAGR) advancing electric and hydrogen-powered waste collection fleets. Automated side-loading systems, digital fleet governance, and noise-optimized garbage trucks are becoming commonplace across EU cities.

North America shows stable growth, with the U.S. market expected to expand at 3.8% CAGR driven by clean fleet mandates, municipal modernization cycles, and early adoption of hydrogen and electric refuse trucks.

Competitive Landscape: Consolidated Market Led by Global OEMs

The competitive landscape is moderately consolidated, with Dongfeng Motor Corporation Ltd. holding an estimated 18.6% share and maintaining leadership through extensive municipal partnerships and a comprehensive product range. Other major players include FULONGMA GROUP, Heil Environmental, Kirchhoff Group, Mack Trucks (AB Volvo), McNeilus, Peterbilt, Terberg Environmental, and XCMG Group.

High entry barriers—such as safety compliance requirements, capital-intensive manufacturing, and long procurement cycles—limit new entrants, reinforcing the dominance of established OEMs.

Recent developments underscore accelerating innovation. In May 2024, New Way Trucks and Hyzon introduced North America's first hydrogen fuel cell-powered garbage truck, while in April 2025, PreZero placed one of Europe's largest electric waste truck orders with Volvo.

Outlook

With rising sustainability commitments, digital transformation of waste logistics, and rapid electrification of municipal fleets, the global garbage truck market is positioned for sustained long-term growth. Vendors leveraging automation, connectivity, and zero-emission technologies stand to gain a competitive advantage as cities modernize their waste collection infrastructure worldwide.

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