

Global and European Heavy Duty Trucks Market Outlook 2025–2035

Global Heavy Duty Trucks Market Set to Surge to USD 489.6 Billion by 2035 Amid Fleet Modernization and Alternative Fuel Adoption

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EINPresswire.com/ -- The global [heavy duty trucks market](#) is poised for robust growth over the next decade, expanding from an estimated USD

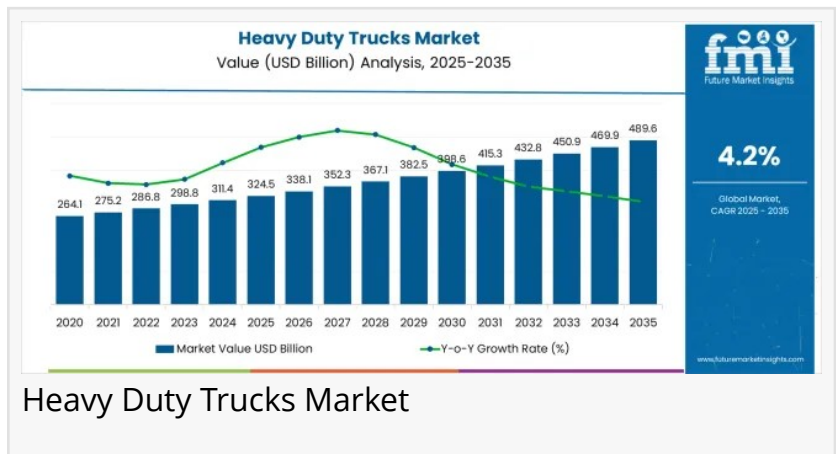
324.5 billion in 2025 to USD 489.6 billion by 2035, reflecting a compound annual growth rate (CAGR) of 4.2%. This growth trajectory is underpinned by fleet modernization, rising industrial freight demand, and evolving emission compliance mandates across major regions.

An elasticity-based analysis highlights distinct growth phases. Between 2025 and 2028, market expansion is expected to add USD 42.6 billion, driven by fleet upgrades in North America and China, with an annualized elasticity of 0.9. The 2028–2031 phase shows heightened sensitivity to demand fluctuations (elasticity 1.1), coinciding with regulatory-driven fleet renewals and revenue increasing from USD 367.1 billion to USD 415.3 billion. From 2031 to 2035, elasticity moderates to 0.7 as replacement cycles stabilize and alternative fuel penetration gains traction. Year-on-year growth peaks above 4.5% during 2027–2029, before decelerating to below 3.5% in later years, signaling a maturing, capital-intensive segment.

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Market Leadership and Segment Dynamics

Class 8 trucks dominate the sector, capturing 61.0% of market revenue in 2025. Their leadership is fueled by high-capacity freight requirements, long-haul operations, and integration of advanced powertrains and telematics. Diesel engines remain the backbone of heavy-duty transportation, accounting for 74.0% of revenue due to superior energy density, torque output, and operational reliability. Within the horsepower spectrum, 400HP–500HP trucks emerge as the



most utilized, representing 36.0% of the market share, balancing performance, fuel efficiency, and route versatility.

The market is also witnessing diversification in fuel and propulsion types. Hybrid electric and natural gas trucks are gaining relevance, particularly in regions with stringent emissions standards. The gradual introduction of battery-electric and hydrogen-powered platforms is anticipated to accelerate post-2029, complementing regulatory compliance and corporate sustainability objectives.

Regional Insights

North America remains a dominant market, propelled by extensive freight networks, advanced infrastructure, and early adoption of alternative-fuel trucks. Class 8 trucks are projected to account for 71.2% of U.S. heavy-duty truck sales by 2027, with over 40% of replacement demand linked to diesel-to-EV transitions. Fleet electrification mandates in states such as California and New York have accelerated adoption of next-generation platforms, while autonomous-ready retrofits are gaining traction in Midwest freight corridors.

China and India are emerging as high-growth regions. China's heavy-duty truck market is forecast to expand at a CAGR of 5.7%, supported by Belt and Road Initiative freight expansion, provincial highway upgrades, and government incentives for compliant trucks. Class 8 vehicles are expected to handle over 31% of national freight tonnage by 2026. India follows at 5.3% CAGR, with growth fueled by infrastructure mega-projects, highway expansions, and organized logistics modernization. BS-VI compliant trucks already constitute over 68% of national sales.

Europe maintains steady momentum with Germany posting a CAGR of 4.8%, driven by modular chassis innovation, freight modernization, and fleet electrification. France and the UK show growth of 4.4% and 4.0%, respectively, as emission regulations and carbon-zone logistics standards incentivize fleet upgrades. Electric heavy truck sales in Germany increased by 39.1% YoY between 2024 and 2027, reflecting early adoption trends.

Drivers Shaping Market Growth

Key growth drivers include industrial freight expansion, e-commerce logistics proliferation, and cross-border trade within regional blocs such as ASEAN, BRICS, and NAFTA. Fleet modernization is further propelled by emission regulations, with mandates like Euro VI-E and EPA 2027 shaping truck design and fueling technology investments.

OEMs are prioritizing powertrain efficiency, advanced driver assistance systems (ADAS), telematics integration, and alternative fuel compatibility. Predictive maintenance and connected fleet solutions are being increasingly deployed, enhancing uptime, reducing operational costs, and supporting data-driven logistics strategies. Autonomous trials and modular platform development are expected to create long-term opportunities, particularly in logistics-heavy

corridors and emerging economies.

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Competitive Landscape

The heavy-duty truck market is highly consolidated, led by Daimler, Freightliner, Navistar, Isuzu Motors, Kenworth, Mack Trucks, MAN, Peterbilt, Scania AB, and Volvo Trucks. Strategies focus on modular chassis design, smart fleet integration, fuel diversification, and electrification. North American OEMs emphasize torque optimization and connectivity, while European players are advancing battery-electric and hybrid solutions to align with zero-emission freight mandates.

Recent developments underscore innovation and sustainability trends. In June 2025, DHL augmented its sustainable fleet with 30 Mercedes-Benz eActros 600 electric trucks, complementing its existing 16 electric trucks and 450 CNG trucks for long-haul operations. These moves illustrate the growing integration of alternative energy platforms and digital fleet management technologies.

Outlook and Future Trajectory

Over the next decade, heavy-duty truck adoption will continue to be shaped by fleet electrification, emission regulations, digital telematics, and cross-border logistics growth. Asia-Pacific and BRICS economies are expected to outpace OECD markets in growth, reflecting higher fleet renewal cycles, infrastructure expansion, and logistics-driven vehicle demand. The confluence of alternative fuel adoption, telematics integration, and intelligent fleet operations is set to redefine performance benchmarks and operational efficiency in the sector.

Quick Facts – Heavy Duty Trucks Market

- 2025 Market Value: USD 324.5 Billion
- 2035 Forecast Value: USD 489.6 Billion
- CAGR (2025–2035): 4.2%
- Leading Segment (2025): Class 8 Trucks – 61.0%
- Top Key Players: Daimler, Freightliner, Navistar, Isuzu Motors, Kenworth, Mack Trucks, MAN, Peterbilt, Scania AB, Volvo Trucks
- Key Growth Regions: North America, Asia-Pacific, Europe

The global heavy-duty trucks market is entering a transformative phase, driven by regulatory compliance, technological innovation, and the transition toward low-emission and connected fleets. This market evolution offers significant insight into long-term growth strategies for OEMs, fleet operators, and logistics stakeholders seeking competitive advantage in an increasingly complex transport ecosystem.

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Sudip Saha

Future Market Insights Inc.

+1 347-918-3531

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