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Global Zero Emission Trucks Market Size Study & Forecast, by Vehicle Type (Electric Light-Duty Trucks, Electric Medium-Duty Trucks, Electric Heavy-Duty Trucks), by Source (BEVs, FCEVs, HEVs), by Application (Last-Mile Delivery, Logistics & Transportation, Construction, Waste Management, Municipal Services) and Regional Forecasts 2025-2035

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Abstracts

The Global Zero Emission Trucks Market is valued at approximately USD 7.51 billion in 2024 and is projected to expand at an exceptional compound annual growth rate of 29.20% over the forecast period 2025–2035, ultimately reaching USD 125.76 billion by 2035. Zero emission trucks, encompassing battery electric, hydrogen fuel cell, and hybrid electric configurations, are engineered to eliminate or significantly reduce tailpipe emissions, thereby aligning freight and commercial transportation with global decarbonization objectives. As regulatory pressure tightens and sustainability commitments cascade down corporate value chains, fleet operators are increasingly shifting away from internal combustion engines and leaning into electrified truck platforms that promise long-term cost efficiency, compliance assurance, and brand equity enhancement. The market analysis is grounded on Historical Data from 2023 and 2024, with 2024 serving as the Base Year for Estimation.

The growth narrative of this market is being written by a confluence of policy mandates, technological maturation, and changing economics of vehicle ownership. Governments across major economies are rolling out stringent emission norms, purchase incentives, and infrastructure funding, which, when taken together, are nudging logistics providers and municipal authorities to phase out diesel fleets. At the same time, rapid advancements in battery energy density, hydrogen storage systems, and power

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electronics are driving down total cost of ownership, making zero emission trucks commercially viable across diverse use cases. Corporate sustainability targets, coupled with rising fuel price volatility, are further compelling fleet managers to transition toward cleaner alternatives. However, challenges such as charging infrastructure gaps, high upfront capital costs, and supply chain dependencies for critical minerals continue to shape adoption curves during the forecast period 2025–2035.

The detailed segments and sub-segments included in the report are:

By Vehicle Type:

Electric Light-Duty Trucks

Electric Medium-Duty Trucks

Electric Heavy-Duty Trucks

By Source:

Battery Electric Trucks (BEVs)

Hydrogen Fuel Cell Electric Trucks (FCEVs)

Hybrid Electric Trucks (HEVs)

By Application:

Last-Mile Delivery

Logistics and Transportation

Construction

Waste Management

Municipal Services

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Electric Light-Duty Trucks are expected to dominate the market by volume and deployment footprint over the forecast horizon. Their dominance is being underpinned by the explosive growth of e-commerce, urban delivery networks, and last-mile logistics, where shorter routes and predictable duty cycles play to the strengths of electric drivetrains. Fleet operators are rolling out light-duty electric trucks at scale to comply with city-level zero-emission zones while simultaneously optimizing operating expenses through lower fuel and maintenance costs. Although medium- and heavy-duty electric trucks are gaining traction, particularly in regional haul and industrial applications, light-duty vehicles continue to anchor the market due to faster return on investment and easier infrastructure integration.

From a revenue standpoint, Battery Electric Trucks (BEVs) currently command the largest share of the Global Zero Emission Trucks Market. BEVs are leading the revenue curve owing to their relative technological maturity, expanding fast-charging networks, and strong policy backing in developed and emerging economies alike. While hydrogen fuel cell electric trucks are increasingly being positioned as a compelling solution for long-haul and heavy-duty operations—thanks to faster refueling times and extended range—their commercial penetration remains in a scaling phase. Hybrid electric trucks, meanwhile, serve as a transitional technology, particularly in regions where full electrification faces infrastructural or operational constraints. This layered technology landscape underscores how revenue leadership today is shaped by readiness and scalability, even as future growth vectors diversify.

Geographically, North America holds a commanding position in the Global Zero Emission Trucks Market, supported by aggressive emission reduction targets, robust R&D ecosystems, and early adoption by logistics giants and municipal fleets. Europe follows closely, driven by stringent carbon regulations, cross-border green freight initiatives, and strong OEM presence. Asia Pacific is anticipated to emerge as the fastest-growing regional market during the forecast period, propelled by rapid urbanization, expanding manufacturing bases, and government-led electrification programs in countries such as China, Japan, and India. Latin America and the Middle East & Africa are gradually entering the adoption curve, supported by pilot projects, public-private partnerships, and growing awareness of sustainable mobility solutions.

Major market players included in this report are:

Tesla, Inc.

Volvo Group

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Daimler Truck AG

BYD Company Ltd.

PACCAR Inc.

Nikola Corporation

Scania AB

Hyundai Motor Company

Toyota Motor Corporation

Iveco Group N.V.

Tata Motors Limited

MAN Truck & Bus SE

Renault Trucks

Hino Motors, Ltd.

Navistar International Corporation

Global Zero Emission Trucks Market Report Scope:

Historical Data – 2023, 2024

Base Year for Estimation – 2024

Forecast period – 2025–2035

Report Coverage – Revenue forecast, Company Ranking, Competitive Landscape, Growth factors, and Trends

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Regional Scope – North America; Europe; Asia Pacific; Latin America; Middle East & Africa

Customization Scope – Free report customization (equivalent to up to 8 analysts' working hours) with purchase. Addition or alteration to country, regional & segment scope*

The objective of the study is to define market sizes of different segments and countries in recent years and to forecast their values over the coming decade. The report integrates both qualitative insights and quantitative analysis to deliver a holistic view of the Global Zero Emission Trucks Market across the forecast period 2025–2035. It sheds light on pivotal growth drivers, structural challenges, and emerging opportunities at the micro-market level, while also mapping the competitive dynamics and strategic positioning of key industry participants. By doing so, the study equips stakeholders with actionable intelligence to navigate investment decisions, product strategies, and long-term market entry plans.

Key Takeaways:

Market Estimates & Forecast for 10 years from 2025 to 2035.

Annualized revenues and regional-level analysis for each market segment.

Detailed analysis of the geographical landscape with country-level analysis of major regions.

Competitive landscape with information on major players in the market.

Analysis of key business strategies and recommendations on future market approach.

Analysis of the competitive structure of the market.

Demand side and supply side analysis of the market.

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