June 2025

ATD TRUCKBEAT

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Despite a solid performance in June, heavy-duty truck sales were down year-over-year through the second quarter. Class 8 truck sales topped 20,000 units in June 2025, up 12.5% compared to June 2024. However, through the first half of the year, Class 8 truck sales were down by 5% compared to the same period in 2024. Medium-duty truck sales were also down year-over-year through the second quarter, with sales down 6.7% compared to the same period last year. Overall, total commercial-truck sales through June 2025 totaled 217,936, a decline of 5.9% year-over-year.

According to ACT Research, Class 8 truck orders fell to a 16-year low in June, totaling 9,400 units and representing a decline of 36% year-over-year. The decline in orders was driven by record-high inventories for Class 8 trucks, low 2025 Q1 profits for publicly traded for-hire fleets, and general market uncertainty surrounding the implementation of tariffs on a variety of goods, including the potential for tariffs hitting new Class 8 trucks. Orders will likely remain low throughout the summer until the excess Class 8 inventory is sold or there is a significant uptick in freight demand. On the medium-duty side, orders for Class 5-7 trucks fell 42% year-over-year in June 2025 to 11,900, the weakest net order total since the pandemic, ACT research says.

As we mentioned in our last report, broad tariffs will impact truck pricing and sales. According to Transport Topics, Volvo Trucks North America and Mack Trucks announced price hikes starting in May following 25% tariffs on imported steel and aluminum. The two OEMs also announced that any added costs incurred from additional tariffs would also be passed onto customers. As this is a very fluid environment with trade policy changing rapidly, it is a challenge for dealers to provide pricing to customers beyond the short term. Our outlook for commercial truck sales has been reduced significantly since the start of the year, with heavy-duty sales forecasts being trimmed by 30,000 units and our medium-duty forecast reduced by 24,000 units. Our full year sales outlook is 233,000 units for medium-duty trucks and 222,000 units for heavy-duty trucks.

U.S. Medium- and Heavy-Duty **Vehicle Sales**

	June 2025	Y/Y %	Jan-Jun	YTD/YTD %
Medium Duty	17,797	-10.8%	110,109	-6.7%
Heavy Duty	20,392	12.5%	107,827	-5.0%
Total	38,189	0.3%	217,936	-5.9%

Market Share, **by Manufacturer**

CLASS 8

Market Share (%)	YTD Change (%)	Manufacturer
37.1	▲ 1.1	FREIGHTLINER
15.5	▼ 0.9	PETERBILT
15.3	▼ 0.3	KENWORTH
10.5	▲ 0.6	INTERNATIONAL
8.2	▼ 2.4	VOLVO
8.0	▲ 1.0	MACK
5.5	▲ 0.9	WESTERN STAR
0.0	◆ 0.0	TESLA

CLASSES 4-7

Manufacturer	YTD Change (%)	Market Share (%)
FORD	▲ 1.8	32.9
FREIGHTLINER	▼ 0.3	18.7
INTERNATIONAL	▲ 3.2	15.8
ISUZU	▼ 1.0	9.0
GM	▼ 0.6	6.6
RAM	▼ 2.4	5.8
PETERBILT	▼ 0.4	3.3
HINO	▲ 0.7	3.2
KENWORTH	▼ 0.4	3.1
MACK	▲ 1.7	1.7

All figures are year-to-date.

Source: Omdia