**UK NEW BUS & COACH REGISTRATIONS**      
17 November 2025(data for Q3 2025)    
**Hi-res charts available via Dropbox: LINK**

**Waning minibus demand in Q3 undermines overall bus market growth**

* New bus, coach and minibus market down by -17.0% to 1,965 units in Q3.
* Strong growth in year-to-date market, however, up 26.9% with 7,465 registrations.
* More than one in four (28.7%) registrations are zero emission in first nine months of 2025.

**Monday 17 November, 2025** UK registrations of new buses, coaches and minibuses fell -17.0% in the third quarter of 2025, reaching 1,965 units, according to the latest figures published by the Society of Motor Manufacturers and Traders (SMMT). The decline marks the end of nine consecutive quarters of growth, with falling minibus registrations chiefly responsible, volumes down -39.8% to 895 units following strong growth in the same period last year. Single and double-deck bus and coach registrations, however, both rose – up 35.8% and 5.7% to 626 and 444 units respectively.

Zero emission vehicle uptake also recorded growth, rising 16.3% in the quarter to 563 units and accounting for more than a quarter (28.6%) of all new buses, coaches and minibuses joining the road in July, August and September. Diesel registrations, meanwhile, declined -25.5% to 1,402 units. This progress reflects significant industry investment in new technologies, with more than 20 zero emission models now available, alongside government support through Zero Emission Bus Regional Area funding.

England accounted for 87.0% of the market, equivalent to 1,709 registrations, although the performance was down -17.9% on the same period in 2024. The second largest market, Scotland, saw the most growth, up 96.9 % to 191 units, while fleet renewal declined in Wales and Northern Ireland – down -65.9% and -61.9% – but at small volumes of just 57 and 8 registrations respectively.

Despite the overall quarterly decline, 2025 still saw the second best Q3 since 2017,1 while year-to-date registrations are 26.9% above 2024 volumes, at 7,465 units. More than half (53.5%) of demand has been driven by minibuses, with an uplift of 23.4% meaning almost 4,000 have gone into service since January. Registrations of single and double decker buses, meanwhile, have risen by 28.4% and 35.0% respectively, with 1,965 and 1,503 units joining the road this year.

Even more positively, more than one in four (28.7%) new registrations in the first nine months have been zero emission, equivalent to 1,918 units and up 55.9% year on year. The UK, as a result, remains Europe’s largest zero emission bus market2 – a significant achievement but one which can only be sustained with a renewed focus on delivering charging infrastructure fit for the sector. A long-term national infrastructure strategy with provision at depots, shared hubs and along routes will be vital to ensure zero emission mass transport becomes a reality for operators and passengers.

**Mike Hawes, SMMT Chief Executive**, said, “A dip in registrations is disappointing but not enough to stall fleet renewal year-to-date. Yet more growth in zero emission demand is good new as the sector continues to invest in new, cleaner models to give operators choice. Given the role these public transport vehicles play in delivering mobility for millions of people – especially in urban and rural areas – we must focus on speeding up the transition. That means investing in sector-specific charging and continuation of Zero Emission Bus Regional Area funding.”

**Notes to editors**

1 New bus, coach and minibus registrations, Q3 2017: XX units.

2 <https://www.acea.auto/cv-registrations/new-commercial-vehicle-registrations-vans-8-2-trucks-9-8-buses-3-6-in-q1-q3-2025/>

**About SMMT and the UK automotive industry**

The Society of Motor Manufacturers and Traders (SMMT) is one of the largest and most influential trade associations, representing the automotive industry in the UK.

The automotive industry is a vital part of the UK economy, integral to growth, the delivery of net zero and the UK as a global trade hub. It contributes £92 billion turnover and £25 billion value added to the UK economy and invested £5 billion in R&D, with 183,000 people employed directly in manufacturing and some 796,000 in total across the wider automotive industry. Many of these automotive manufacturing jobs are outside London and the South-East, with wages that are 8% higher than the UK average. The sector accounts for 13.4% of total UK exports of goods with more than 140 countries importing UK produced vehicles, generating £108 billion of trade in total automotive imports and exports.

The UK manufactures almost every type of vehicle, from cars, to vans, taxis, trucks, buses and coaches, as well as specialist and off-highway vehicles, supported by more than 2,500 component providers and some of the world's most skilled engineers. In addition, the sector has vibrant aftermarket and remanufacturing industries. The automotive industry also supports jobs in other key sectors – including advertising, chemicals, finance, logistics and steel.

More detail on UK Automotive available in SMMT's Motor Industry Facts publication at [www.smmt.co.uk/reports/smmt-motor-industry-facts/](https://linkprotect.cudasvc.com/url?a=http%3a%2f%2fclick.agilitypr.delivery%2fls%2fclick%3fupn%3dq-2FLDa0hDiW76FMqhIH6mp5-2FMTGpUEJbaCvc6DuDo36VcR8RSJY3Bb5j6PbOH1m-2BGBroLVjN0i37n2XGzfuZqWeJIleDttsiCosv-2FDCrC6xU-3DNJg9_FQC2LT8GxayrM161hhHVAu067ZxSQQmW4GgEbtFUHlnhSWpWCBkdzj4Kj3fTDj3UcGAZVk99-2Bu1tfX9z9RQO-2B9fp1S7-2Fexh6yUV9D8RBopPF9ftQfnPc7Oo8dF-2F33tfJjdydmYFo-2B3-2FZ4S3f9yiwFBWbAH2cHJTjoEr5feTUeIMrD8UWKTM1I1WBxqo-2BXD3fbqrVstjQgJpCVUtkuS44mATwZi-2FbDS0RLy4Kc-2Fak9mJlNrH2Nah4rxWcpFJUTjG3RiewRLsY-2FAZI6U0gEwzyg9f9kMfDtIVBFWqvytbp6QcWQj2PeXkpCxvRodUjf3F1bU-2FxLse2gxEG9OKOYYxtS1tA2LYKxhRnFj9q53jyGZweydKCFcHXXvlm-2BEtwQKouRDkalUMxcmwIMiSFD018yHvLjhh-2FC8go6WJBD0qJAAoMxe6pRcHATJUuLQLxwba6pecZLrra-2Fg4iylWC-2FWgmiA-3D-3D&c=E,1,shIdwDxv4DuE5O9ruDV8SOnjRMbYMUMBvtuJxpEKqrl46ScL8uWK0I3vTeCBbKaz6ApDgOsYVpzNo1oLsNWSiqoAg1rNS4OJq8sxq_-Rh3TtLukLbc6Kt-UlbkI,&typo=1)

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