












Busworld Europe Brussels, 4-9 Oct. 2025 – Key takeaways

As part of Next Wave - Phase IV, Iceland  
New Energy (INE) attended Busworld  
Europe 2025, the leading zero-emission  
bus exhibition in Europe, held at Brussels  
Expo, Belgium, 4-9 October 2025



## FACTS & FIGURES

EXHIBITION		559 EXHIBITORS	
	NET SIZE (SQM) <b>82,000</b>	 VEHICLE MANUFACTURERS <b>81</b>	 COUNTRIES <b>40</b>
	NO. OF VEHICLES <b>238</b>	 SUPPLIERS <b>478</b>	 BELGIAN EXHIBITORS <b>23</b> INTERNATIONAL EXHIBITORS <b>536</b>
45,427 VISITORS			
	<b>REGION</b>		<b>VISITOR TYPE</b>
EUROPE	85.6%	BUSINESS	42.9%
ASIA	5.3%	BUS/COACH OPERATOR	33.7%
MIDDLE EAST	4.2%	FEDERATION/ASSOCIATION	0.9%
LATIN AMERICA	1.9%	GOVERNMENT	2.8%
NORTH AMERICA	1.4%	UNIVERSITIES/RESEARCH	0.8%
AFRICA	1.2%	TOURISM ORGANIZATION	6.9%
OCEANIA	0.5%	NGO	0.6%
		MISCELLANEOUS	11.2%
			<b>DECISION-MAKING LEVEL</b>
		BOARD	16.7%
		TOP-LEVEL MANAGEMENT	27.7%
		MIDDLE-LEVEL MANAGEMENT	16.5%
		FIRST-LEVEL MANAGEMENT	8.8%
		EMPLOYEE	27.9%
		TRAINEE	0.8%
		STUDENT	1.7%

## Key takeaways (I)



- Zero-emission (ZE) solutions available in “nearly” all categories
- Battery electric (BE) solutions ~70% of demonstrated ZE solutions (H<sub>2</sub> ~30%) (personal guestimate)
- Battery coaches highly visible. Indicating >400 km range and 1,2 MW charging capabilities
  - Chinese highly visible in this segment and offering lower CAPEX
- Almost all sizes of buses available with battery solutions
  - In buses and coaches frequently diesel heaters are used for comfort and range
- H<sub>2</sub> visible in larger buses



## Battery electric highly visible



## Increased luggage carrying capacity for new BE solutions



## Key takeaways (II)

- In some presentations BE solutions were addressed
  - “Much lower range in cold conditions”
    - In most Nordic locations, buses/coaches will use diesel heaters. Up to 4-6 l. diesel per 100 km, therefore not zero-emission
  - Very high tire tear and wear (due to the heavy weight of the vehicle). This impacts the OPEX, while tire dust has impact on health conditions in inner cities
  - Heavier vehicles – also impact road conditions
  - These issues must be accounted for in the total life cycle and environmental costing
- Availability of vehicles increasing relatively fast
  - Longer range and lower costs foreseen during the years to come
- There are no obstacle for bus operators to switch to zero emission
  - Except a higher CAPEX in the beginning
  - Infrastructure needs to be built simultaneously
- Both technologies available
  - Deployment in hundreds, both of BE & H<sub>2</sub>, by operators



## Articulated H<sub>2</sub> bus



## Producers offer both H<sub>2</sub> and BE





Double-deckers were available both BE and H<sub>2</sub>

Battery range above 400 km



Lets clean up our cities  
BE and H<sub>2</sub> buses and coaches are readily available now



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