Zeroing in on
Zero-Emission Trucks

June 2025 Market Update
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OVERVIEW

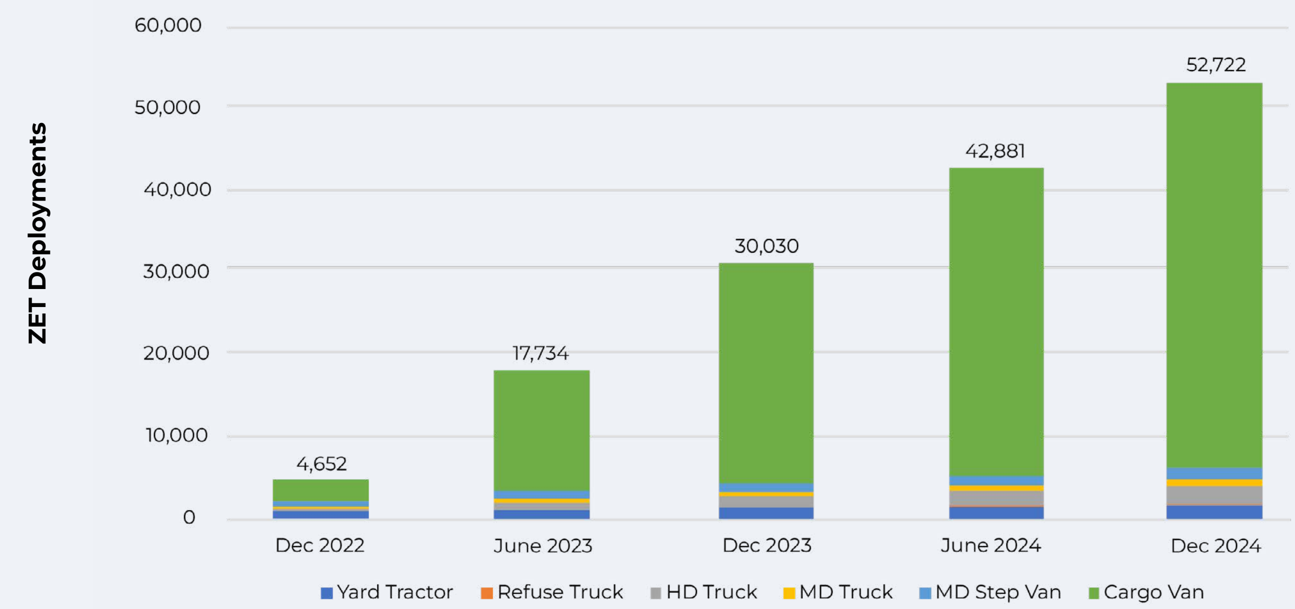
This update on the U.S. zero-emission truck (ZET) market presents zero-emission deployment statistics—including purchases and leased vehicles—for cargo vans, medium-duty (MD) step vans, MD trucks, heavy-duty (HD) trucks, refuse trucks, and yard tractors as of December 2024. More than 52,500 ZETs have now been deployed nationwide, with 9,841 added in the last six months of 2024. In total, 22,692 ZETs were deployed in 2024—an increase of 76% from 2023. Out of 978,748 total new truck registrations in 2024, ZETs account for 2.3%, down from 3% in 2023. This adoption pace must double to meet federal climate targets of 100% new ZE truck and bus sales by 2040, with an interim goal of 30% by 2030.

ZE cargo vans continue to dominate ZET deployments, comprising 89% of all ZETs nationwide. The remaining 11% is distributed across HD trucks (4%), yard tractors (3%), MD step vans (3%), MD trucks (1%), and refuse trucks (0.2%). California (7,684), Texas (5,009), and Florida (4,022) remain the top three states for ZET deployments. However, growth is expanding beyond early-adopter states, with Maryland (439%), Georgia (247%), and New Mexico (141%) experiencing the largest increases in ZET deployments during 2024, highlighting the widening geographic reach of adoption. All heavy-duty segments saw positive year-over-year performance, with refuse trucks (56%), yard tractors (30%), and HD trucks (1%) each recording more deployments in 2024 than in 2023.

1 TOTAL U.S. ZET DEPLOYMENTS

ZETs continue to offer compelling advantages for fleets and communities alike—incuding lower operating costs from fuel and maintenance savings, increased driver satisfaction from a quieter and smoother driving experience, and improved air quality in communities through the elimination of tailpipe emissions. As of December 2024, more than 52,500 ZETs had been deployed in the United States (Figure 1).[1] These represent deployments from 38 original equipment manufacturers (OEMs) across more than 4,500 fleets. Nearly all of these deployments are battery-electric, though 155 hydrogen fuel cell electric trucks have also been deployed, all in the HD truck segment.

Figure 1: Cumulative U.S. ZET Deployments



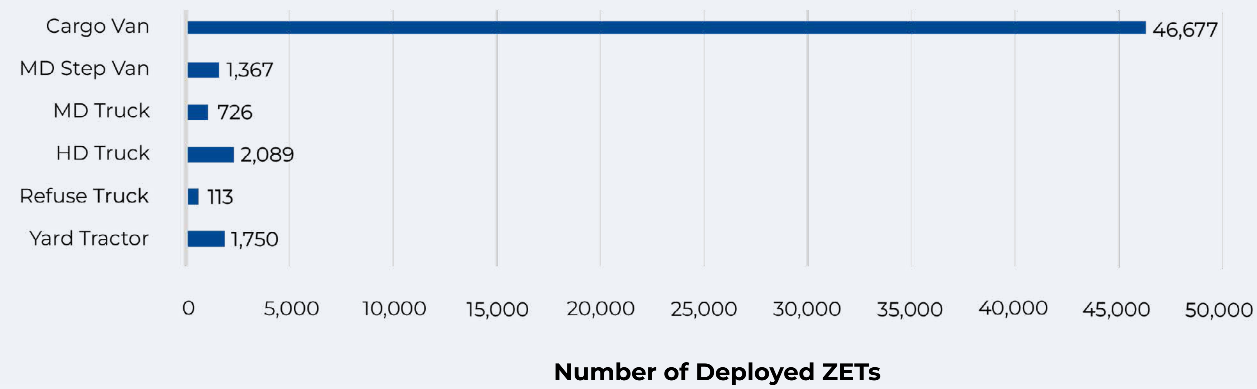
ZET deployments have shown steady growth over the past two years. However, the last six months of 2024 saw a slowdown, with 9,841 new deployments, the lowest half-year total since the acceleration began in early 2023. This could be attributed to a drop in ZE cargo van deployments in the last half of 2024, which saw less than 9,000 deployed, compared to the more than 11,000 deployments in the previous three 6-month reporting windows. ZE cargo vans have much quicker delivery timelines than the other segments, with many OEMs having hundreds of vehicles ready at dealerships for immediate purchase off the lot. Policy uncertainty surrounding the U.S. presidential election and the status of the Advanced Clean Trucks (ACT) regulation across states may have caused

[1] See Appendix A for definitions, data sources, and assumptions made in this market update.

some fleets to express greater caution when deploying ZETs. Due to the quick delivery timelines of ZE cargo vans, these hesitations are more noticeable in the short term. ZE cargo vans continue to lead the zero-emission vehicle segment with approximately 46,677 deployments (Figure 2), but ZE yard tractors have the greatest market share—accounting for roughly 2.82% of the total yard tractor stock.[2] They have proven to be high performing, cost-effective, and operationally superior to their diesel-powered counterparts. Similar to ZE cargo vans, ZE yard tractors face relatively few barriers to adoption and are ideal for fleets due to their low mileage duty cycles, quick return on investment, and controlled operating environment where infrastructure can be more easily installed and managed. Today, ZE yard tractors are deployed in 37 states, with the earliest deployments dating back to before 2017.

Despite growing interest in ZETs, the lack of exponential growth can be traced to several key barriers: the upfront costs and financing is unaffordable to the majority of fleets; infrastructure build out—both private and public—remains underdeveloped

Figure 2: Cumulative U.S. ZET Deployments by Segment



and still takes a considerable amount of time to complete; and policy uncertainty at both the federal and state levels has created hesitation among fleets, OEMs, and infrastructure providers to invest.

Solutions to these barriers will be critical to achieving mass-market adoption of ZETs.

Most fleets are focused on the total cost of ownership of their vehicles, and the current upfront costs of ZETs make it hard for fleets to see a positive return on investment. Upfront costs can be reduced with vehicle incentives[3], more attractive leasing using residual value benchmarking or using

[2] It is estimated that 30%-40% of yard tractors are registered. We estimate the true total stock of yard tractors to be 62,000.
[3] See Appendix B for a full list of state incentive programs.

government-backed loan guarantees to mitigate risk, and tax exemptions for ZETs, which states like Colorado have already implemented. These short-term solutions can make purchasing or leasing a ZET more financially viable for fleets and a positive return on investment more likely. Infrastructure deployment can be accelerated with standardized utility processes or the creation of make-ready programs to reduce fleet burdens. Increasing the use of shared charging sites, which are owned and operated by a third-party, will allow multiple fleets to charge at the site without having to build their own infrastructure or acquire chargers, further reducing their upfront costs. Innovative options such as trucking-as-a-service or charging-as-a-service can help alleviate both the infrastructure and upfront cost barriers by paying a flexible fee for an all-inclusive package that can consist of the truck, infrastructure, maintenance, and insurance. Strong, consistent policy leadership is needed to harmonize federal and state regulations, extend frameworks like the ACT rule or the Low Carbon Fuel Standard (LCFS) to additional states, and provide long-term market certainty to the industry which will increase their confidence to invest. These solutions must be supported by bold action at all levels of government and underpinned by stable funding and regulatory clarity. Just as critical will be forging strong partnerships among states, fleets, OEMs, infrastructure providers, utilities, and community stakeholders—collaborations that can streamline deployments, reduce risk, and ensure that ZET investments deliver shared, lasting benefits. Continued and expanded support with long-term policy certainty is needed to maintain ZET adoption momentum across all sectors.

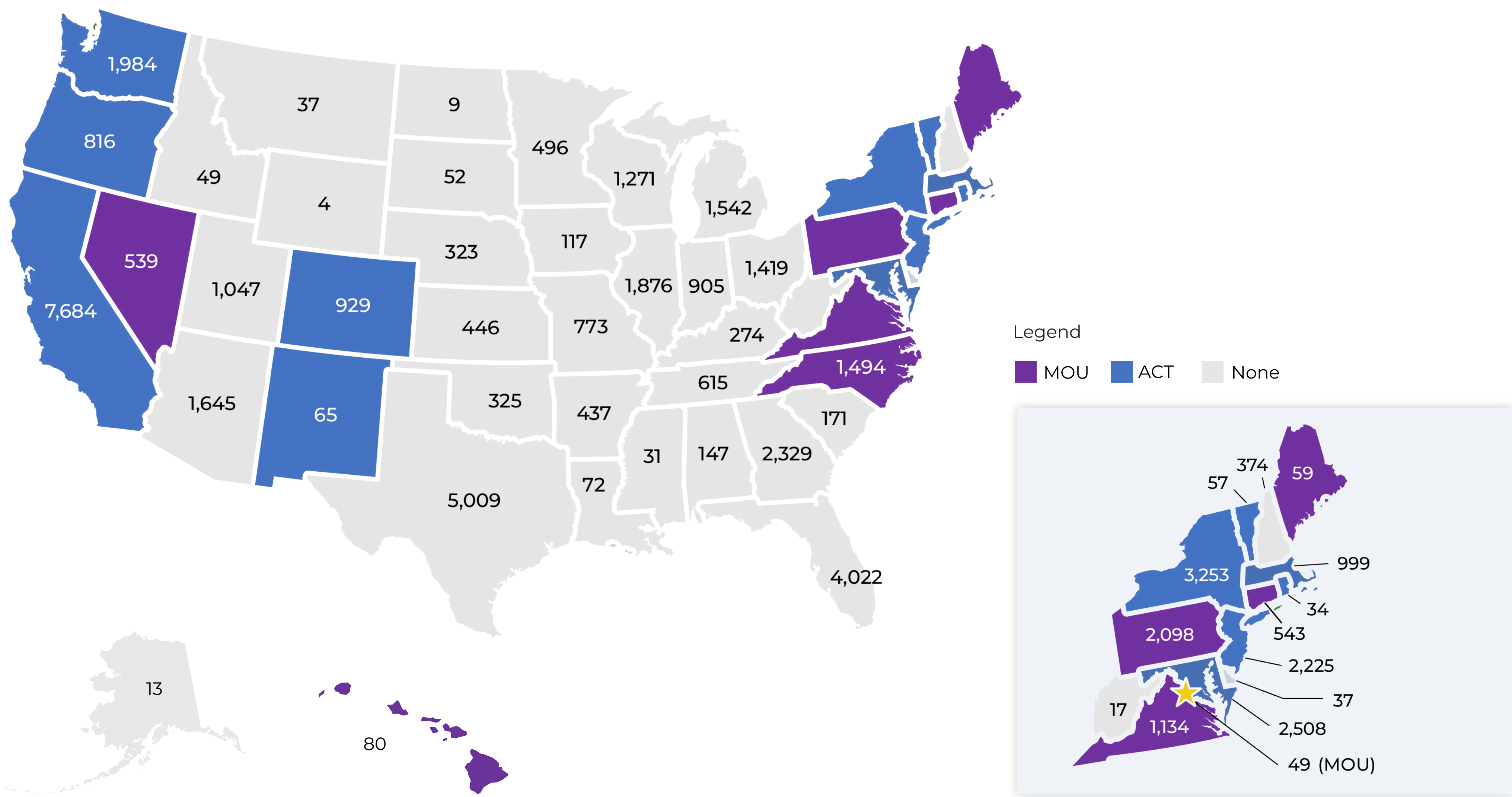
2 U.S. ZET DEPLOYMENTS BY STATE

Of the cumulative U.S. ZET deployments, 39% were in states that have adopted the ACT regulation; these states represent just 27% of the nation's total truck stock.[4] Moreover, 11% of ZET deployments are in states that have signed the Multi-State Medium- and Heavy-Duty Zero Emission Vehicle Memorandum of Understanding (MOU), and 49% were in non-MOU states. Figure 3 presents the number of deployed ZETs by state and identifies major state-level ZET sales regulations and commitments. Categories include states that have the highest level of ZET policy ambition that, as of December 2024, have adopted the ACT regulations (blue), states that have signed the MOU but have not yet adopted ACT (purple), and non-MOU states (gray).[5]

[4] States that have adopted the ACT rule as of December 2024 include California, Colorado, Maryland, Massachusetts, New Jersey, New Mexico, New York, Oregon, Rhode Island, Vermont, and Washington. All states that have adopted the ACT rule have also signed the MOU, with the exception of New Mexico.

[5] In January 2025, the state of California withdrew the Advanced Clean Fleets (ACF) waiver. ZET deployments may have been influenced prior to its withdrawal.

Figure 3: State ZET Deployments and Policy Status



THE TOP FIVE STATES FOR TOTAL ZET DEPLOYMENTS ARE:

1. **California: 7,684**
2. **Texas: 5,009**
3. **Florida: 4,022**
4. **New York: 3,253**
5. **Maryland: 2,508**

17 states now have more than 1,000 ZET deployments, up from 16 in the June 2024 reporting period. The impact of regulation is clear: the share of ZET deployments in ACT states has increased steadily, up one percentage point in each of the last three reporting periods, to reach 39%. This growth demonstrates how regulations like ACT can provide long-term market signals that incentivize industries to drive investments in vehicle development, infrastructure, and fleet adoption. However, ACT is just one tool in a broader policy toolkit that states can use to drive the transition to ZETs. CALSTART has identified seven key market dimensions that can accelerate ZET deployment:

1. **Set Targets**
2. **Implement Critical Planning**
3. **Institute Supportive Innovative Policy**
4. **Establish Vehicle Incentives**
5. **Prepare and Support Infrastructure**
6. **Establish Regulations**
7. **Drive Economic Development**

Target-setting and planning provide a foundation for coordinated ZET rollouts, ensuring deployment aligns with freight corridors and logistics hubs. These frameworks allow states to establish clear goals with actionable steps to achieve them. Vehicle incentives and infrastructure investments help fleets overcome high upfront costs and charging constraints—their biggest barriers to ZET adoption. These targeted programs encourage fleet adoption and spur early market growth of new technologies. Regulations enforce market direction and encourage industry investment in ZETs, creating clear timelines for developing a zero-emission freight ecosystem across all sectors. Innovative policy and economic development initiatives—such as workforce training or infrastructure credits—create broader benefits supporting long-term success by establishing a complete zero-emission freight ecosystem that strengthens local economies. For fleets, OEMs, and infrastructure providers navigating early adoption, these complementary strategies reduce risk, build confidence, and accelerate market transformation.

3 2024 U.S. ZET DEPLOYMENTS

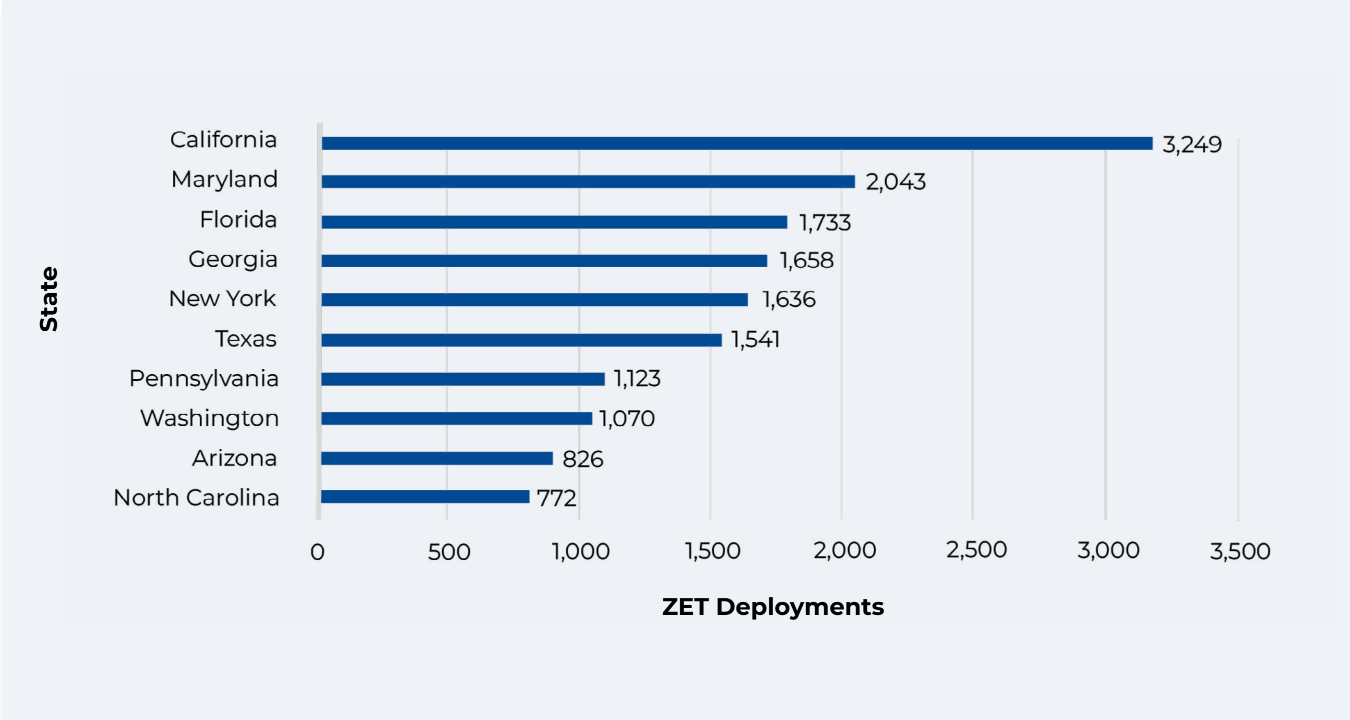
With nearly 23,000 additional ZETs deployed in 2024, fleets maintained strong momentum despite a modest drop from the previous year. 2024 still marked important progress, particularly in the emergence of new market leaders and broader geographic distribution of deployments. ZE cargo vans continued to dominate ZET deployments, representing 91% of all 2024 ZET deployments. However, they also experienced an 11% decrease compared to 2023, aligning with similar dips in MD trucks (-10%) and MD step vans (-39%). In contrast, heavy-duty applications saw growth in deployments compared to 2023: refuse trucks (56%), yard tractors (30%), and HD trucks (1%) all saw increases in 2024 deployments.

Figure 4 highlights the top ten states for 2024 ZET deployments. The top five states were:

1. **California: 3,249**
2. **Maryland: 2,043**
3. **Florida: 1,733**
4. **Georgia: 1,658**
5. **New York: 1,636**

Notably, Maryland surged into second place for ZET deployments in 2024, deploying 1,432 ZETs in just the last six months of 2024—the most of any state in that timeframe. As a result, Maryland climbed from fifteenth to fifth nationally in cumulative ZETs. With all seven ZET market dimensions in place, Maryland's coordinated approach is paying dividends.

Figure 4: Top 10 States for 2024 ZET Deployments



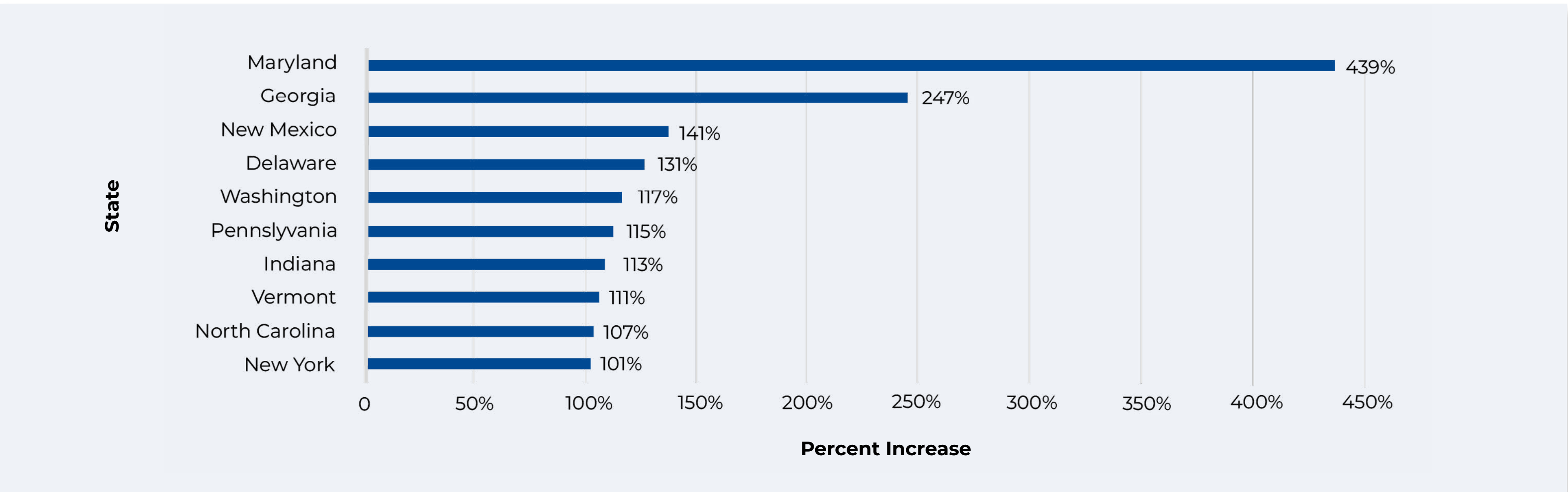
Maryland was not merely a volume leader; it also had the highest percentage growth in ZET deployments among all states in 2024, with a 439% increase from the state's cumulative deployments at the end of 2023 (Figure 5). The top five states in terms of percentage increase in ZET deployments from 2023 to 2024 include:

1. **Maryland: 439%**
2. **Georgia: 247%**
3. **New Mexico: 141%**
4. **Delaware: 131%**
5. **Washington: 117%**

In total, 13 states more than doubled their year-end 2023 ZET totals in 2024, while 17 states deployed more ZETs in 2024 than in 2023. Despite the overall dip in national deployment numbers from 2023, more states reached the 1,000 ZET annual deployment milestone in 2024 (eight states) than 2023 (six states). Interestingly, the median number of ZET deployments per state fell from 297 in 2023 to 137 in 2024. This pattern reveals an emerging trend: although deployments continue to increase nationally, they are becoming increasingly concentrated in a handful of high-performing states, with the majority of states experiencing declining year-over-year deployment numbers in 2024.

The top ten states for ZET deployments in 2024 represent a diverse range of strategies. While some states—like Maryland—are leveraging comprehensive policy ecosystems, others—like Georgia—are succeeding through private sector investment. The coastal bias remains strong, as freight corridors and seaports continue to anchor early ZET deployments. To ensure nationwide progress, more regions will need to adopt multi-faceted strategies that promote long-term certainty for ZET investments. This approach will reduce risk, spur investment, and support fleets at every stage of the transition.

Figure 5: Top 10 States with Largest Percentage Increases in ZET Deployments (2023 to 2024)



STATE SPOTLIGHTS

TEXAS

Total ZETs: 5,009
2024 ZETs: 1,541
ZET Market Dimensions: 5

Texas is proving that ZET growth does not have to be driven by regulations alone. Deployment of ZETs in Texas has been fueled by strong regional incentive programs like the Texas Volkswagen Environmental Mitigation Program grants and the Texas Clean Fleet Grants. Texas has also enabled private sector engagement and investment in charging infrastructure. Its trucking market size, high freight volume, low electricity costs, minimal regulatory barriers for deploying charging depots, and port access make Texas a key ZET growth market.

MARYLAND

Total ZETs: 2,508
2024 ZETs: 2,043
ZET Market Dimensions: 7

Maryland has emerged as a ZET frontrunner through their balanced policy strategy. The state has adopted ACT regulation, launched the Medium-Duty and Heavy-Duty Zero-Emission (MHD ZEV) Grant incentive program, and is heavily engaged in multistate planning. These efforts have sent a strong market signal, catalyzing investment and rapid ZET growth.

GEORGIA

Total ZETs: 2,329
2024 ZETs: 1,658
ZET Market Dimensions: 3

Georgia's ZET boom is being fueled by its robust economic development strategy, attracting more than $28 billion in clean energy manufacturing investments since January 2021. The clean energy sector already employed 215,300 Georgia workers and will grow with these additional investments. With a focus on clean freight and job creation, the state is quickly emerging as a ZET hotspot despite having fewer formal policy levers in place.

4 OVERALL TRUCK MARKET

Beyond the market for zero-emission trucks, understanding the overall market can help contextualize where efforts can be more impactful to accelerate ZET adoption. Key insights[6] about the overall truck market:

- The U.S. medium- and heavy-duty (MHD) truck market is primarily composed of heavy-duty trucks (36%), with medium-duty trucks (34%) and cargo vans (27%) following.
- The top five states for truck stock—California (11%), Texas (7.3%), Florida (5.2%), Pennsylvania (4.8%), and Indiana (4.7%)—collectively represent 33% of the national truck stock.
- States that have adopted the ACT rule represent 27.1% of national MHD truck stock and 20.3% of June–December 2024 truck deployments.
- More broadly, states that have signed the MOU (including ACT states) represent 39.6% of national MHD truck stock and 32.4% of June–December 2024 truck deployments.
- Five states dominate recent U.S. truck deployments, accounting for 28.6% of June–December 2024 MHD truck deployments: Texas (7%), Florida (6%), Indiana (5.2%), Arizona (5.2%), and Pennsylvania (5.2%).
- Used trucks make up 54% of the national MHD truck stock, with 32.3% of these used vehicles owned by small fleets.[7]
- Over a quarter (30%) of the U.S. MHD truck stock is individually owned. Among these individually owned trucks, the distribution is 39% cargo vans, 37% MD trucks, and 23% HD trucks.
- Seven vocations represent 77.3% of the total MHD truck stock: individual owners (30%), general freight (12.4%), services (10.1%), construction (9.2%), lease/rental (7.5%), wholesale/retail (5.1%), and government/miscellaneous (3%).
- The U.S. MHD truck fleet remains predominately powered by conventional fuels, with diesel accounting for 59% and gasoline for 33% of the national stock. Flexible fuel vehicles follow at 7%, while all other fuel types (natural gas, electric, hydrogen, hybrid, etc.) represent the remaining 1%.

CONCLUSION: ALIGNING THE ZET MARKET

Transitioning to zero-emission transportation in the freight industry is critical to combat the climate crisis. Although medium and heavy-duty vehicles make up 10% of the U.S. vehicle stock, they account for more than 25% of all transportation-related greenhouse gas emissions. Decarbonizing freight operations is not just a niche climate solution—it is a necessary step to achieve broader transportation sector goals and ensure cleaner air for communities across the country.

Despite a slowdown in ZET deployments in 2024, the long-term case for ZETs remains strong. ZETs provide clear operational, environmental, and long-term financial advantages for fleets, particularly as technology continues to mature and the total cost of ownership improves. However, the transition remains uneven. Persistent challenges—including high upfront

[6] Explore updated data for both the U.S. overall truck market and ZET market using the interactive dashboard at https://calstart.org/zio-zets/.

[7] Small fleets are defined by a fleet with less than 20 vehicles.

vehicle costs and financing, underdeveloped infrastructure, and policy uncertainty—continue to hamper widespread investment.

As the federal landscape becomes more uncertain with the change in administration, **state leadership has never been more critical**. States have a broad toolkit at their disposal: they can set ambitious deployment targets, launch or expand vehicle and infrastructure incentives, adopt regulations like ACT, and implement supportive planning and procurement strategies. These seven market dimensions—when deployed together or in strategic combinations—create conditions for industry confidence and market momentum. Ensuring that all states have the tools and support to deploy ZETs will be essential to achieving national climate goals and unlocking the full potential of zero-emission freight. Equally important will be forming impactful partnerships—between states, fleets, OEMs, infrastructure providers, utilities, and community stakeholders—to coordinate efforts, share resources, and maintain the momentum of the ZET industry.

APPENDIX A: DEFINITIONS, DATA SOURCES, AND ASSUMPTIONS

This update provides a concise and current snapshot of the dynamic U.S. MHD truck market as of December 2024. It presents deployment statistics for ZETs and characterizes the existing U.S. MHD truck market for Class 2b (8,501–10,000 lbs.) through Class 8 (33,000 lbs. and above) vehicles. These vehicles are categorized into six distinct segments: cargo vans, MD step vans, MD trucks, HD trucks, refuse trucks, and yard tractors.

ZET deployments are tracked from 2017 onward. While ZETs could have been deployed prior to 2017, they are not included in this analysis due to technological maturity limitations of earlier models.

Yard tractor deployments are likely underreported as many are not registered for on-road use and much of the data on deployments comes from vehicle registrations. This data limitation may understate the actual adoption rate of zero-emission yard tractors in the marketplace. Unless otherwise noted, all figures are copyright CALSTART, based on data from author correspondence with manufacturers, IHS Markit, California's Clean Off-Road Equipment Voucher Incentive Project (CORE), California's Clean Truck and Bus Voucher Incentive Project (HVIP), public press releases, and the New York Truck Voucher Incentive Program (NYTVIP). Figure 3 represents only the 52,434 ZETs for which deployment locations are known. Some deployment numbers may differ slightly from the previous market update due to corrections in the data provided by OEMs. State totals do not equal total deployments because deployment locations are not known for all ZETs.

Data sources in Table A-1 are listed in descending order of prevalence within the dataset used to determine ZET deployments.

Table A-1: Data Sources

Data Source	Description	Specific Data Used
Private Correspondence	Author correspondence with OEMs	ZET deployments as of December 2024
IHS Markit	Global provider of information and analysis on world markets and industries	U.S. truck registrations as of December 2024
California CORE	California's Clean Off-Road Equipment Voucher Incentive Project	ZE yard tractor deployments as of December 2023
California HVIP	California's Clean Truck and Bus Voucher Incentive Project	ZET deployments as of December 2023
Public Press Releases	Press releases from OEMs announcing delivered sales	ZET deployments as of December 2023
NYTVIP	Truck voucher incentive program administered by the State of New York	ZET deployments as of December 2021

APPENDIX B: STATE INCENTIVE PROGRAMS

Table B-1: State Incentive Programs

State	Incentive Program	Incentive Type	Funding	Year Started	Active
California	California's Clean Truck and Bus Voucher Incentive Project (HVIP)	Voucher	Vehicle	2010	Yes
California	Clean Off-Road Equipment (CORE) Voucher Incentive Project	Voucher	Vehicle	2021	Yes

Table B-1: State Incentive Programs

State	Incentive Program	Incentive Type	Funding	Year Started	Active
California	Energy Infrastructure Incentives for Zero-Emission (EnergIIZE) Commercial Vehicles	Voucher	Infrastructure	2022	Yes
California	Implementation of MHD Vehicle Infrastructure	Grant	Infrastructure	2023	No
Colorado	Clean Fleet Vehicle Technology Grant Program	Grant	Vehicle	2023	No
Colorado	Fleet Zero	Grant	Infrastructure	2023	Yes
Colorado	Colorado State Sales and Use Tax Exemption	Tax Exempt	Vehicle	2024	Yes
Delaware	EV Charging Equipment Rebates	Rebate	Infrastructure	2023	Yes
Federal	Commercial Clean Vehicle	Tax Credit	Vehicle	2023	Yes
Federal	Clean Ports Program	Grant	Both	2024	No
Federal	Clean HD Vehicles	Grant	Both	2024	No
Hawaii	Diesel Replacement Rebate	Rebate	Vehicle	2023	Yes

State	Incentive Program	Incentive Type	Funding	Year Started	Active
Illinois	Driving a Cleaner Illinois	Grant	Both	2025	Yes
Illinois	Business & Public Sector Electric Vehicle Rebate Program	Rebate	Vehicle	2024	Yes
Maryland	Medium-Duty and Heavy-Duty Zero-Emission Vehicle Grant Program	Grant	Both	2024	No
Massachusetts	Massachusetts Offers Rebates for Electric Vehicles (MOR-EV) Trucks Program	Rebate	Vehicle	2022	Yes
Massachusetts	MassEVIP	Grant	Infrastructure	2014	Yes
Minnesota	Heavy-Duty On-Road Replacement Grant	Grant	Vehicle	2024	No
Montana	Clean Truck, Bus & Airport Equipment Funding Program	Grant	Vehicle	2024	No
Nevada	Nevada Clean Trucks and Buses Program	Grant	Vehicle	2025	No
New Jersey	New Jersey Zero-Emission Incentive Program (NJ ZIP)	Voucher	Vehicle	2020	Yes
New Jersey	Clean Fleet EV Program	Grant	Both	2023	Yes
New Jersey	Sales and Use Tax Exemption	Tax Exempt	Vehicle	2004	No
New York	New York Truck Voucher Inventive Program (NYTVIP)	Voucher	Vehicle	2011	Yes

State	Incentive Program	Incentive Type	Funding	Year Started	Active
New York	New York City Clean Trucks Program (NYCCTP)	Voucher	Vehicle	2012	Yes
Oklahoma	On-Road Program	Grant	Vehicle	2024	No
Oregon	Rebate Program for Medium and Heavy Duty Zero-Emission Vehicles	Rebate	Vehicle	2024	Yes
Pennsylvania	Medium- and Heavy-Duty Zero-Emission Vehicle Fleet Pilot Grant	Grant	Both	2023	No
Pennsylvania	Alternative Fuels Incentive Grants	Grant	Vehicle	2022	No
Tennessee	Medium- and Heavy-Duty Vehicles Grant Program	Grant	Vehicle	2025	Yes
Texas	All-Electric Grant Program	Grant	Both	2023	Yes
Texas	Grants for Heavy-Duty Vehicles and Equipment	Grant	Vehicle	2024	No
Washington	Clean Alternative Fuel Commercial Vehicles and Vehicle Infrastructure	Tax Credit	Both	2020	Yes
Washington	EV Charging Infrastructure Program	Grant	Infrastructure	2023	No
Washington	Infrastructure and Incentive Program for Medium and Heavy Duty Zero	Voucher	Both	2025	No

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ABOUT CALSTART

CALSTART is a national nonprofit driving the clean transportation revolution. For over 30 years, CALSTART has partnered with 240+ member companies, from startups to Fortune 100 firms, to advance zero-emission vehicles, innovative transportation solutions, and supportive policies. Based in Pasadena, CA, with offices nationwide, CALSTART fosters economic growth, creates jobs, and reduces pollution for a sustainable future worldwide. Learn more at calstart.org.