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FEDERATION OF AUTOMOBILE DEALERS ASSOCIATIONS

804-805-806, Surya Kiran, 19, K G Marg

New Delhi - 110 001 (INDIA)

T +91 11 6630 4852, 2332 0095, 4153 1495

E fada@fada.in

CIN U74140DL2004PNL130324

FOR IMMEDIATE RELEASE

FADA Releases July'21 Vehicle Retail Data

- **Total vehicle retails for the month of July'21 rise by 34.12% on YoY basis. When compared to July'19 (a regular pre-covid month), recovery is visible as the deficit reduces to low double digits of -13.22%.**
- **On YoY basis, all categories were in green with 2W up by 28%, 3W up by 83%, PV up by 63%, Tractor up by 7% and CV up by 166%.**
- **After Tractors, PV for the first time shows strong numbers by clocking 24% growth when compared to pre-covid month of July'19.**
- **FADA has been raising red flag about semi-conductor shortage since quite some time. The situation is now becoming grave with ever-increasing supply-side constraints.**
- **The delta variant and a possibility of 3rd wave continues to remain a threat for stable Auto Retails.**

9th August'21, New Delhi: The Federation of Automobile Dealers Associations (FADA) today released Vehicle Retail Data for July'21.

July'21 Retails

Commenting on how July'21 performed, FADA President, Mr. Vinkesh Gulati said, **"With entire country now open, July continues to see robust recovery in Auto Retails as demand across all categories remain high. The low base effect also continues to play its part.**

With all categories in green, CV's continue to see increase in demand specially in M&HCV segment with the Government rolling out infrastructure projects in many parts of the country.

PV's witnesses high demand specially with buzz around new launches and compact SUV segments. The waiting period due to supply side constraints have been persisting since quite a few months and is now becoming a deep routed issue for OEM's.

The 2W segment though continues to see positive demand YoY, the rate of recovery remains sluggish as customers at the bottom of the pyramid suffer with poor disposable income and rural markets where covid cases were high during the 2nd wave.

Auto Retails have now started narrowing the deficit when compared to pre-covid months. When compared to July'19, the gap reduces to low double digits of -13%. With Tractor retails already above pre-covid levels during the last month, Passenger Vehicles for the first time have reached the same by growing 24%."

Near Term Outlook

The month of August begins on a positive note as demand and enquiry levels continue to improve across all categories. With IMD forecasting a normal monsoon during August- September period,

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sowing operations will pick up gradually. This will have a rub off effect on rural sales especially in Tractor segment.

On the other hand, the global semi-conductor shortage is now becoming a deep routed problem for the PV segment which is now above the pre-pandemic mark. FADA has been raising red-flag since quite some time on demand-supply mis-match.

In an internal survey conducted by FADA, 60% Dealers of PV segment said that they have at least 2 months waiting period for select variants. 35% Dealers also said that the waiting period is more than 4 months among select variants.

The delta variant of Covid if goes out of proportion can be another deterrent and put brakes on auto retail's recovery with India entering the festive season months.

- Inventory at the end of July'21
 - Average inventory for Passenger Vehicles ranges from 30-35 days
 - Average inventory for Two – Wheelers ranges from 20-25 days

Chart showing Vehicle Retail Data**All India Vehicle Retail Data for July'21**

CATEGORY	JUL'21	JUL'20	YoY %	JUL'19	% Chg, JUL'19
2W	11,32,611	8,87,937	27.56%	13,99,409	-19.07%
3W	27,904	15,244	83.05%	58,943	-52.66%
PV	2,61,744	1,60,681	62.90%	2,10,626	24.27%
TRAC	82,388	77,257	6.64%	55,543	48.33%
CV	52,130	19,602	165.94%	69,361	-24.84%
LCV	34,895	15,886	119.66%	41,898	-16.71%
MCV	2,888	369	682.66%	4,877	-40.78%
HCV	11,307	1,169	867.24%	19,774	-42.82%
Others	3,040	2,178	39.58%	2,812	8.11%
Total	15,56,777	11,60,721	34.12%	17,93,882	-13.22%

Source: FADA Research

Disclaimer:

- 1- The above numbers do not have figures from AP, MP, LD & TS as they are not yet on Vahan 4.
- 2- Vehicle Retail Data has been collated as on 07.08.21 in collaboration with Ministry of Road Transport & Highways, Government of India and has been gathered from 1,305 out of 1,519 RTOs.
- 3- CV is subdivided in the following manner
 - a. LCV – Light Commercial Vehicle (incl. Passenger & Goods Vehicle)
 - b. MCV – Medium Commercial Vehicle (incl. Passenger & Goods Vehicle)
 - c. HCV – Heavy Commercial Vehicle (incl. Passenger & Goods Vehicle)
 - d. Others – Construction Equipment Vehicles and others

JUL'21 Category-wise market share can be found in Annexure 1, Page No. 04

----- End of Press Release -----



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About FADA India

Founded in 1964, Federation of Automobile Dealers Associations (FADA), is the apex national body of Automobile Retail Industry in India engaged in the sale, service and spares of 2/3 Wheelers, Passenger Cars, UVs, Commercial Vehicles (including buses and trucks) and Tractors. FADA India represents over 15,000 automobile dealers having 26,500 dealerships including multiple Associations of Automobile Dealers at the Regional, State and City levels representing the entire Auto Retail Industry. Together we employ ~4 million people at dealerships and service centres.

FADA India, at the same time also actively networks with the Industries and the authorities, both at the Central & State levels to provide its inputs and suggestions on the Auto Policy, Taxation, Vehicle Registration Procedure, Road Safety and Clean Environment, etc. to sustain the growth of the Automobile Retail Trade in India.



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Annexure 1

OEM wise Market Share Data for the Month of July'21 with YoY comparison

Two-Wheeler (2W)				
Two-Wheeler OEM	JUL'21	Market Share (%) , JUL'21	JUL'20	Market Share (%) , JUL'20
HERO MOTOCORP LTD	4,01,904	35.48%	3,59,621	40.50%
HONDA MOTORCYCLE AND SCOOTER INDIA (P) LTD	2,77,813	24.53%	2,05,813	23.18%
TVS MOTOR COMPANY LTD	1,65,487	14.61%	1,25,681	14.15%
BAJAJ AUTO LTD	1,37,507	12.14%	94,476	10.64%
SUZUKI MOTORCYCLE INDIA PVT LTD	47,171	4.16%	29,879	3.36%
ROYAL-ENFIELD (UNIT OF EICHER LTD)	42,610	3.76%	34,949	3.94%
INDIA YAMAHA MOTOR PVT LTD	40,498	3.58%	33,222	3.74%
HERO ELECTRIC VEHICLES PVT. LTD	4,218	0.37%	399	0.04%
PIAGGIO VEHICLES PVT LTD	3,826	0.34%	2,105	0.24%
OKINAWA AUTOTECH PVT LTD	2,580	0.23%	409	0.05%
CLASSIC LEGENDS PVT LTD	2,541	0.22%	592	0.07%
ATHER ENERGY PVT LTD	1,799	0.16%	144	0.02%
PUR ENERGY PVT LTD	1,317	0.12%	24	0.00%
Others including EV	3,340	0.29%	623	0.07%
Total	11,32,611	100.00%	8,87,937	100.00%

Source: FADA Research

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- 3- Others include OEMs accounting less than 0.1% Market Share.



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Three-Wheeler (3W)				
Three-Wheeler OEM	JUL'21	Market Share (%), JUL'21	JUL'20	Market Share (%), JUL'20
BAJAJ AUTO LTD	10,039	35.98%	5,713	37.48%
PIAGGIO VEHICLES PVT LTD	3,898	13.97%	3,092	20.28%
YC ELECTRIC VEHICLE	1,173	4.20%	548	3.59%
ATUL AUTO LTD	1,056	3.78%	344	2.26%
MAHINDRA & MAHINDRA LIMITED	1,029	3.69%	302	1.98%
CHAMPION POLY PLAST	550	1.97%	132	0.87%
MAHINDRA REVA ELECTRIC VEHICLES PVT LTD	528	1.89%	190	1.25%
SAERA ELECTRIC AUTO PVT LTD	501	1.80%	271	1.78%
TVS MOTOR COMPANY LTD	464	1.66%	390	2.56%
BEST WAY AGENCIES PVT LTD	403	1.44%	142	0.93%
DILLI ELECTRIC AUTO PVT LTD	369	1.32%	155	1.02%
J. S. AUTO (P) LTD	320	1.15%	107	0.70%
THUKRAL ELECTRIC BIKES PVT LTD	297	1.06%	104	0.68%
VANI ELECTRIC VEHICLES PVT LTD	291	1.04%	183	1.20%
Others including EV	6,986	25.04%	3,571	23.43%
Total	27,904	100.00%	15,244	100.00%

Source: FADA Research

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- 3- Others include OEMs accounting less than 1% Market Share.

Commercial Vehicle (CV)				
Commercial Vehicle OEM	JUL'21	Market Share (%), JUL'21	JUL'20	Market Share (%), JUL'20
TATA MOTORS LTD	19,126	36.69%	4,102	20.93%
MAHINDRA & MAHINDRA LIMITED	14,215	27.27%	9,029	46.06%
ASHOK LEYLAND LTD	7,249	13.91%	1,647	8.40%
MARUTI SUZUKI INDIA LTD	3,603	6.91%	1,408	7.18%
VE COMMERCIAL VEHICLES LTD	2,807	5.38%	685	3.49%
DAIMLER INDIA COMMERCIAL VEHICLES PVT. LTD	774	1.48%	232	1.18%
FORCE MOTORS LIMITED, A FIRODIA ENTERPRISE	731	1.40%	149	0.76%
SML ISUZU LTD	401	0.77%	97	0.49%
Others	3,224	6.18%	2,253	11.49%
Total	52,130	100.00%	19,602	100.00%

Source: FADA Research

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Passenger Vehicle (PV)				
Passenger Vehicle OEM	JUL'21	Market Share (%), JUL'21	JUL'20	Market Share (%), JUL'20
MARUTI SUZUKI INDIA LTD	1,14,294	43.67%	80,681	50.21%
HYUNDAI MOTOR INDIA LTD	44,737	17.09%	30,078	18.72%
TATA MOTORS LTD	24,953	9.53%	13,041	8.12%
MAHINDRA & MAHINDRA LIMITED	16,326	6.24%	7,954	4.95%
KIA MOTORS INDIA PVT LTD	15,995	6.11%	7,265	4.52%
TOYOTA KIRLOSKAR MOTOR PVT LTD	9,876	3.77%	4,525	2.82%
RENAULT INDIA PVT LTD	7,919	3.03%	5,062	3.15%
HONDA CARS INDIA LTD	6,815	2.60%	3,408	2.12%
FORD INDIA PVT LTD	4,643	1.77%	3,294	2.05%
SKODA AUTO VOLKSWAGEN GROUP	3,759	1.44%	1,797	1.12%
SKODA AUTO VOLKSWAGEN INDIA PVT LTD	3,475	1.33%	1,577	0.98%
VOLKSWAGEN AG/INDIA PVT. LTD.	189	0.07%	85	0.05%
AUDI AG	90	0.03%	1	0.00%
SKODA AUTO INDIA/AS PVT LTD	5	0.00%	134	0.08%
MG MOTOR INDIA PVT LTD	3,613	1.38%	1,360	0.85%
NISSAN MOTOR INDIA PVT LTD	3,552	1.36%	258	0.16%
MERCEDES -BENZ GROUP	974	0.37%	428	0.27%
MERCEDES-BENZ INDIA PVT LTD	869	0.33%	409	0.25%
MERCEDES -BENZ AG	105	0.04%	19	0.01%
FIAT INDIA AUTOMOBILES PVT LTD	921	0.35%	280	0.17%
BMW INDIA PVT LTD	652	0.25%	279	0.17%
JAGUAR LAND ROVER INDIA LIMITED	245	0.09%	86	0.05%
FORCE MOTORS LIMITED, A FIRODIA ENTERPRISE	142	0.05%	16	0.01%
VOLVO AUTO INDIA PVT LTD	119	0.05%	99	0.06%
PCA AUTOMOBILES INDIA PVT LTD	63	0.02%	0	0.00%
PORSCHE AG GERMANY	36	0.01%	7	0.00%
AUTOMOBILI LAMBORGHINI S.P.A	6	0.00%	5	0.00%
BENTLEY MOTORS LTD	5	0.00%	1	0.00%
ROLLS ROYCE	2	0.00%	2	0.00%
Others	2,097	0.80%	755	0.47%
Total	2,61,744	100.00%	1,60,681	100.00%

Source: FADA Research

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Tractor (TRAC)				
Tractor OEM	JUL'21	Market Share (%), JUL'21	JUL'20	Market Share (%), JUL'20
MAHINDRA & MAHINDRA LIMITED (TRACTOR)	20,210	24.53%	18,891	24.45%
MAHINDRA & MAHINDRA LIMITED (SWARAJ DIVISION)	13,110	15.91%	12,441	16.10%
TAFE LIMITED	10,047	12.19%	9,669	12.52%
INTERNATIONAL TRACTORS LIMITED	9,139	11.09%	9,097	11.77%
ESCORTS LIMITED (AGRI MACHINERY GROUP)	8,822	10.71%	8,846	11.45%
JOHN DEERE INDIA PVT LTD(TRACTOR DEVISION)	6,109	7.41%	5,118	6.62%
EICHER TRACTORS	5,348	6.49%	5,011	6.49%
CNH INDUSTRIAL (INDIA) PVT LTD	2,966	3.60%	2,687	3.48%
KUBOTA AGRICULTURAL MACHINERY INDIA PVT.LTD.	2,000	2.43%	1,244	1.61%
V.S.T. TILLERS TRACTORS LIMITED	924	1.12%	948	1.23%
CAPTAIN TRACTORS PVT. LTD.	515	0.63%	852	1.10%
FORCE MOTORS LIMITED, A FIRODIA ENTERPRISE	449	0.54%	449	0.58%
INDO FARM EQUIPMENT LIMITED	270	0.33%	161	0.21%
Others	2,479	3.01%	1,843	2.39%
Total	82,388	100.00%	77,257	100.00%

Source: FADA Research

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