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FOR IMMEDIATE RELEASE

FADA Releases June'22 Vehicle Retail Data

- *On YoY basis, total vehicle retail for the month of June'22 increased by 27%. All categories were in green. 2W, 3W, PV, Tractors and CV were up by 20%, 212%, 40%, 10% and 89% respectively.*
- *Though few categories are consistently showing recovery, full recovery is yet to be witnessed when compared to pre-covid times.*
- *When matched with June'19, total vehicle retail was down by -9%. PV and Tractor continued to show growth by rising 27% and 40%. For the first time, CV also increased by 4%. The two categories which continue to underperform were 2W and 3W which de-grew by -16% and -6% respectively.*
- *Overall Q1'22 grew by 64% when compared to Q1'21 which saw intermittent lockdowns, but de-grew by -8% when compared to Q1'19. Only PV and Tractor were in green for the entire quarter.*
- *Increased wholesale reflects ease in semi-conductor availability thus reducing supply side constraints going ahead.*
- *High inflationary pressure becomes a cause of major concern.*

5th July'22, New Delhi: The Federation of Automobile Dealers Associations (FADA) today released Vehicle Retail Data for June'22.

June'22 Retails

Commenting on how June'22 performed, FADA President, Mr. Vinkesh Gulati said, **"Auto Retail for the month of June'22 continued to show its positive run when compared YoY with June'21, a month which continued to face the brunt of covid.**

When compared to June'19, a pre-covid month, overall sales were down by -9%. Apart from PV and Tractors which were already above pre-covid level for last few months and grew by 27% and 40%, CV for the first time showed a growth of 4% thus indicating recovery slowly creeping in for this segment. While 3W narrowed its de-growth and was at down by -6%, it's the 2W segment which still remains the biggest cause of concern and is not picking as per expectation. The same was down by -16%.

Poor market sentiment especially in rural India, high cost of ownership, inflationary pressure and June generally being a lean month due to rains kept 2W sales at low speed. In the 3W category, a major shift has happened in electric category. Apart from this, permit issues and frequent price increase remained the biggest dampeners.

The PV segment continued to see robust growth. An increase in wholesale clearly shows that semi-conductor availability is now getting easier. Waiting period, especially in compact SUV and SUV segment continued to remain high. New vehicle launches are seeing robust booking thus reflecting healthy demand pipeline.

The CV segment showed strength for the first time as it grew by 4% when compared to June'19, a pre-covid month. Bus segment along with LCVs are showing good traction."

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Near Term Outlook

The Russia – Ukraine crises has increased inflationary pressure world over. RBI Governor during the recent Monetary Policy meeting has also flagged high inflation as a major cause of concern. In the past few months, prices of almost all essential items have moved northwards, thereby putting pressure on the common man's household budget and thus reducing his disposable income. Additionally, the high fuel prices have had a spill over effect on transportation and made it expensive. This will have a negative effect on entry level PV as well as 2W segment which are generally dominated by first time buyers.

On the other hand, ease in availability of semi-conductors will see increased supply especially in PV segment and thus reduce waiting period.

If Rural India stabilises, Auto retail will enter festive season on a good note.

Key Findings from our Online Members Survey

- **Inventory at the end of June'22**
  - Average inventory for Passenger Vehicles ranges from 15 – 20 days
  - Average inventory for Two – Wheelers ranges from 20 – 23 days
- **Liquidity**
  - Neutral 41.8%
  - Good 40.0%
  - Bad 18.2%
- **Sentiment**
  - Good 41.8%
  - Neutral 41.8%
  - Bad 16.4%
- **Expectation from July**
  - Growth 50.3%
  - Flat 35.2%
  - De-growth 14.5%

Chart showing Vehicle Retail Data

All India Vehicle Retail Data for June'22

CATEGORY	JUNE'22	JUNE'21	YoY %	JUNE'20	% Change w.r.t JUNE'20	JUNE'19	% Change w.r.t JUNE'19
2W	11,19,096	9,30,825	20.23%	7,95,834	40.62%	13,38,154	-16.37%
3W	46,040	14,735	212.45%	12,079	281.16%	48,830	-5.71%
PV	2,60,683	1,85,998	40.15%	1,28,374	103.07%	2,05,250	27.01%
TRAC	57,340	52,289	9.66%	45,763	25.30%	40,954	40.01%
CV	67,696	35,810	89.04%	10,628	536.96%	65,136	3.93%
LCV	*40,349*	*21,729*	*85.69%*	*8,434*	*378.41%*	*38,917*	*3.68%*
MCV	*4,709*	*2,100*	*124.24%*	*79*	*5860.76%*	*4,749*	*-0.84%*
HCV	*19,380*	*9,591*	*102.06%*	*347*	*5485.01%*	*18,928*	*2.39%*
Others	*3,258*	*2,390*	*36.32%*	*1,768*	*84.28%*	*2,542*	*28.17%*
Total	**15,50,855**	**12,19,657**	**27.16%**	**9,92,678**	**56.23%**	**16,98,324**	**-8.68%**

Source: FADA Research

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All India Vehicle Retail Data for Q1 FY'22

CATEGORY	Q1 FY'22	Q1 FY'21	Q1 FY'20	Q1 FY'19	YoY % (2021)	YoY % (2020)	YoY % (2019)
2W	35,38,718	22,07,324	12,75,708	40,97,089	60.32%	177.39%	-13.63%
3W	1,29,944	41,590	24,543	1,49,013	212.44%	429.45%	-12.80%
PV	7,93,238	4,83,163	1,82,407	6,77,702	64.18%	334.87%	17.05%
TRAC	1,58,169	1,07,231	61,668	1,17,410	47.50%	156.48%	34.72%
CV	2,12,886	1,04,929	31,950	2,19,189	102.89%	566.31%	-2.88%
LCV	*1,23,004*	*59,763*	*21,986*	*1,34,108*	*105.82%*	*459.46%*	*-8.28%*
MCV	*13,402*	*6,570*	*1,710*	*13,086*	*103.99%*	*683.56%*	*2.42%*
HCV	*66,836*	*31,918*	*5,385*	*57,478*	*109.40%*	*1141.12%*	*16.28%*
Others	*9,643*	*6,678*	*2,868*	*14,518*	*44.41%*	*236.23%*	*-33.58%*
Total	**48,32,955**	**29,44,237**	**15,76,276**	**52,60,403**	**64.15%**	**206.61%**	**-8.13%**

Source: FADA Research

Disclaimer:

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2- Vehicle Retail Data has been collated as on 03.07.22 in collaboration with Ministry of Road Transport & Highways, Government of India and has been gathered from 1,282 out of 1,409 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

June'22 Category-wise market share can be found in Annexure 1, Page No. 04

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

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 June'22 with YoY comparison

Two – Wheeler (2W)				
Two-Wheeler OEM	**JUNE'22**	**Market Share (%), JUNE'22**	**JUNE'21**	**Market Share (%), JUNE'21**
HERO MOTOCORP LTD	3,83,165	34.24%	4,15,395	44.63%
HONDA MOTORCYCLE AND SCOOTER INDIA (P) LTD	2,85,691	25.53%	1,96,785	21.14%
TVS MOTOR COMPANY LTD	1,66,412	14.87%	1,19,999	12.89%
BAJAJ AUTO LTD	1,00,094	8.94%	1,07,055	11.50%
SUZUKI MOTORCYCLE INDIA PVT LTD	50,099	4.48%	25,170	2.70%
INDIA YAMAHA MOTOR PVT LTD	44,475	3.97%	22,409	2.41%
ROYAL-ENFIELD (UNIT OF EICHER LTD)	42,813	3.83%	36,156	3.88%
OKINAWA AUTOTECH PVT LTD	6,980	0.62%	959	0.10%
AMPERE VEHICLES PRIVATE LIMITED	6,540	0.58%	268	0.03%
HERO ELECTRIC VEHICLES PVT. LTD	6,503	0.58%	1,200	0.13%
OLA ELECTRIC TECHNOLOGIES PVT LTD	5,874	0.52%	-	0.00%
ATHER ENERGY PVT LTD	3,808	0.34%	319	0.03%
PIAGGIO VEHICLES PVT LTD	3,553	0.32%	1,900	0.20%
CLASSIC LEGENDS PVT LTD	3,294	0.29%	1,576	0.17%
REVOLT INTELLICORP PVT LTD	2,423	0.22%	59	0.01%
PUR ENERGY PVT LTD	1,125	0.10%	460	0.05%
Others including EV	6,247	0.56%	1,115	0.12%
Total	**11,19,096**	**100.00%**	**9,30,825**	**100.0%**

Source: FADA Research

Disclaimer:

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2- Vehicle Retail Data has been collated as on 03.07.22 in collaboration with Ministry of Road Transport & Highways, Government of India and has been gathered from 1,282 out of 1,409 RTOs.
3- Others include OEMs accounting less than 0.1% Market Share.

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Three-Wheeler (3W)				
Three-Wheeler OEM	**JUNE'22**	**Market Share (%), JUNE'22**	**JUNE'21**	**Market Share (%), JUNE'21**
BAJAJ AUTO LTD	11,383	24.72%	4,927	33.44%
PIAGGIO VEHICLES PVT LTD	4,203	9.13%	2,258	15.32%
YC ELECTRIC VEHICLE	2,385	5.18%	539	3.66%
MAHINDRA & MAHINDRA LIMITED	1,975	4.29%	656	4.45%
SAERA ELECTRIC AUTO PVT LTD	1,435	3.12%	295	2.00%
ATUL AUTO LTD	1,225	2.66%	594	4.03%
MAHINDRA REVA ELECTRIC VEHICLES PVT LTD	1,190	2.58%	273	1.85%
TVS MOTOR COMPANY LTD	1,144	2.48%	226	1.53%
CHAMPION POLY PLAST	1,088	2.36%	269	1.83%
UNIQUE INTERNATIONAL	1,034	2.25%	155	1.05%
DILLI ELECTRIC AUTO PVT LTD	1,018	2.21%	192	1.30%
MINI METRO EV L.L.P	936	2.03%	121	0.82%
J. S. AUTO (P) LTD	612	1.33%	203	1.38%
SKS TRADE INDIA PVT LTD	545	1.18%	78	0.53%
TERRA MOTORS INDIA PVT LTD	532	1.16%	77	0.52%
E ROYCE MOTORS INDIA PVT LTD	505	1.10%	-	0.00%
LECTRIX EV PVT LTD	482	1.05%	22	0.15%
Others including EV	14,348	31.16%	3,850	26.13%
Total	**46,040**	**100.00%**	**14,735**	**100.00%**

Source: FADA Research

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Commercial Vehicle (CV)				
Commercial Vehicle OEM	**JUNE'22**	**Market Share (%), JUNE'22**	**JUNE'21**	**Market Share (%), JUNE'21**
TATA MOTORS LTD	27,829	41.11%	14,013	39.13%
MAHINDRA & MAHINDRA LIMITED	15,950	23.56%	9,206	25.71%
ASHOK LEYLAND LTD	10,105	14.93%	4,583	12.80%
VE COMMERCIAL VEHICLES LTD	4,509	6.66%	1,957	5.46%
MARUTI SUZUKI INDIA LTD	2,730	4.03%	1,802	5.03%
DAIMLER INDIA COMMERCIAL VEHICLES PVT. LTD	1,088	1.61%	740	2.07%
FORCE MOTORS LIMITED, A FIRODIA ENTERPRISE	1,086	1.60%	760	2.12%
SML ISUZU LTD	965	1.43%	296	0.83%
Others	3,434	5.07%	2,453	6.85%
Total	**67,696**	**100.00%**	**35,810**	**100.00%**

Source: FADA Research

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Passenger Vehicle (PV)				
Passenger Vehicle OEM	**JUNE'22**	**Market Share (%), JUNE'22**	**JUNE'21**	**Market Share (%), JUNE'21**
MARUTI SUZUKI INDIA LTD	1,06,948	41.03%	75,135	40.40%
TATA MOTORS LTD	36,974	14.18%	20,556	11.05%
HYUNDAI MOTOR INDIA LTD	36,952	14.18%	34,835	18.73%
MAHINDRA & MAHINDRA LIMITED	19,400	7.44%	12,548	6.75%
KIA MOTORS INDIA PVT LTD	18,414	7.06%	15,046	8.09%
TOYOTA KIRLOSKAR MOTOR PVT LTD	12,039	4.62%	5,421	2.91%
SKODA AUTO VOLKSWAGEN GROUP	7,042	2.70%	1,792	0.96%
SKODA AUTO VOLKSWAGEN INDIA PVT LTD	*7,010*	*2.69%*	*1,624*	*0.87%*
VOLKSWAGEN AG/INDIA PVT. LTD.	*2*	*0.00%*	*115*	*0.06%*
AUDI AG	*29*	*0.01%*	*45*	*0.02%*
SKODA AUTO INDIA/AS PVT LTD	*1*	*0.00%*	*8*	*0.00%*
HONDA CARS INDIA LTD	6,818	2.62%	4,758	2.56%
RENAULT INDIA PVT LTD	5,787	2.22%	5,516	2.97%
MG MOTOR INDIA PVT LTD	3,311	1.27%	2,775	1.49%
NISSAN MOTOR INDIA PVT LTD	2,175	0.83%	2,205	1.19%
FIAT INDIA AUTOMOBILES PVT LTD	1,116	0.43%	788	0.42%
MERCEDES -BENZ GROUP	928	0.36%	585	0.31%
MERCEDES-BENZ INDIA PVT LTD	*901*	*0.35%*	*557*	*0.30%*
MERCEDES -BENZ AG	*27*	*0.01%*	*21*	*0.01%*
DAIMLER AG	*0*	*0.00%*	*7*	*0.00%*
BMW INDIA PVT LTD	872	0.33%	409	0.22%
FORCE MOTORS LIMITED, A FIRODIA ENTERPRISE	270	0.10%	85	0.05%
JAGUAR LAND ROVER INDIA LIMITED	160	0.06%	135	0.07%
VOLVO AUTO INDIA PVT LTD	108	0.04%	67	0.04%
PORSCHE AG GERMANY	58	0.02%	9	0.00%
PCA AUTOMOBILES INDIA PVT LTD	58	0.02%	59	0.03%
FORD INDIA PVT LTD	16	0.01%	2,829	1.52%
AUTOMOBILI LAMBORGHINI S.P.A	5	0.00%	2	0.00%
ROLLS ROYCE	2	0.00%	2	0.00%
BENTLEY MOTORS LTD	1	0.00%	4	0.00%
Others	1,229	0.47%	437	0.23%
Total	**2,60,683**	**100.00%**	**1,85,998**	**100.00%**

Source: FADA Research

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Tractor (TRAC)				
Tractor OEM	**JUNE'22**	**Market Share (%), JUNE'22**	**JUNE'21**	**Market Share (%), JUNE'21**
MAHINDRA & MAHINDRA LIMITED (TRACTOR)	13,191	23.00%	11,636	22.25%
MAHINDRA & MAHINDRA LIMITED (SWARAJ DIVISION)	9,637	16.81%	8,446	16.15%
TAFE LIMITED	7,389	12.89%	6,476	12.39%
INTERNATIONAL TRACTORS LIMITED	6,947	12.12%	6,689	12.79%
ESCORTS LIMITED (AGRI MACHINERY GROUP)	6,060	10.57%	6,475	12.38%
JOHN DEERE INDIA PVT LTD(TRACTOR DEVISION)	4,517	7.88%	3,839	7.34%
EICHER TRACTORS	3,289	5.74%	3,075	5.88%
CNH INDUSTRIAL (INDIA) PVT LTD	2,110	3.68%	2,243	4.29%
KUBOTA AGRICULTURAL MACHINERY INDIA PVT.LTD.	1,404	2.45%	797	1.52%
FORCE MOTORS LIMITED, A FIRODIA ENTERPRISE	410	0.72%	189	0.36%
V.S.T. TILLERS TRACTORS LIMITED	339	0.59%	309	0.59%
INDO FARM EQUIPMENT LIMITED	307	0.54%	241	0.46%
CAPTAIN TRACTORS PVT. LTD.	199	0.35%	188	0.36%
Others	1,541	2.69%	1,686	3.22%
Total	**57,340**	**100.00%**	**52,289**	**100.00%**

Source: FADA Research

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