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FOR IMMEDIATE RELEASE

# FADA Releases July'26 Vehicle Retail Data

***Auto Retail July 2026: History's First All-Category Sweep — Every Segment Posts Its Best-Ever July as Registrations Rise 25.89%; Alternative Fuels Close Within Striking Distance of Petrol in PV***

## July'26 Retail Performance

• Overall Retail: 25,91,138 units | +25.89% YoY | -0.16% MoM — **First month in history where all six categories posted their Best-Ever July**

• 2W: 18,18,289 | +28.25% — PV: 4,16,555 | +19.13% — CV: 99,666 | +24.04%

• 3W: 1,33,778 | +16.16% — Tractors: 1,17,349 | +28.10% — Wheeled CE: 5,501 | +46.07%

## What Defined July

• A seasonally soft, monsoon-heavy month delivered the **12th-highest retail month of the 151 since Jan'14** — a list otherwise dominated by festive months; growth broad-based across categories, not mix-led

• **PV alternative-fuel share (CNG + Hybrid + EV) at 40.59% closed within 1.09 percentage points of petrol (41.68%)** — the gap was 13.21 points a year ago; 2W EV share at a record 11.24%

• **Total EV retails at an all-time high of 3,27,901 units** — EV penetration ~12.7% vs 9.6% in Jul'25, with 2W and CV EV volumes also at all-time records

• GST 2.0 affordability, a recovering monsoon and festival timing powered YoY growth on a soft Jul'25 base; heavy rains, floods and the Aadi/Shravan window tempered MoM — **Rural outpaced Urban YoY in all six categories**, though Rural 2W (-6.16% MoM) paused while Rural CV (+7.41%) and Tractors (+13.62%) accelerated

## Inventory Signal

• **PV inventory rose by 1 day over June-end to 33–35 days** — well above FADA's recommended 21-day benchmark; with festive stocking beginning and dispatches running ahead of retail, OEM billing discipline is critical

## Near-Term Outlook – August'26

• 74.30% of dealers expect growth, 22.90% flat and only 2.80% de-growth — up sharply from 51.24% heading into July

• Drivers: festive curtain-raiser (Independence Day launches, Onam 16–26 Aug, Raksha Bandhan 28 Aug), monsoon-fed rural cashflows and a low base; watch-outs: August rainfall, E20 clarity and aged PV stock

• Overall sentiment: **Optimistic**

## Next 3 Months Outlook – August-September-October'26

• **87.85% of dealers expect growth — the strongest three-month reading in the survey's recent history**, up from 66.17% last month

• Key risks: festive demand underdelivering vs elevated expectations, crude/currency volatility and PV inventory pile-up; October meets a high GST-cut base with Diwali shifting to November

• Overall sentiment: **Decisively Constructive**

**06th August'26, New Delhi, BHARAT:** The Federation of Automobile Dealers Associations (FADA) today released Vehicle Retail Data for Jul'26.

**Jul'26 Auto Retail**

Reflecting on July 2026 Auto Retail performance, **FADA Vice President Mr. Sai Giridhar said: "**July'26 has etched itself into Indian Auto Retail history — **for the first time on record, every single category posted its best-ever July**, with Two-Wheelers, Three-Wheelers, Commercial Vehicles, Passenger Vehicles, Tractors and Wheeled Construction Equipment all at all-time July highs. The industry retailed 25,91,138 units, up 25.89% YoY — the strongest July growth in the series outside Covid-distorted base years — while holding almost flat (-0.16%) over a strong June. Growth was emphatically broad-based rather than mix-led, with Wheeled Construction Equipment at +46.07%, 2W at +28.25%, Tractors at +28.10%, CV at +24.04%, PV at +19.13% and 3W at +16.16%. That a seasonally soft, erratic monsoon July ranks as the 12th-highest retail month of the 151 months since Jan'14 — a list otherwise dominated by festive months — speaks to the structural depth of the India Growth Story. Dealers attribute this momentum to GST 2.0-led affordability, ease of retail finance and favourable festival timing on a July'25 base that had declined nearly 4%, alongside a quiet inflection that deserves the industry's attention: alternative fuels are now within striking distance of petrol in the Passenger Vehicle market.

Two-Wheeler retails stood at 18,18,289 units, up 28.25% YoY — the best July ever and the first time 2W has crossed the 18-lakh mark in a July — though 1.26% lower MoM. On a YoY basis Rural (+28.59%) edged past Urban (+27.86%), but the sequential picture diverged sharply: **Urban 2W rose 5.04% MoM while Rural declined 6.16%**, as erratic rains and flooding across western and central belts and the inauspicious Aadi/Shravan window in southern markets kept rain-fed rural walk-ins subdued. Dealers cited GST-led affordability, the reopening of schools and colleges, improving monsoon sentiment and accelerating EV adoption — **2W EV share touched a record 11.24%** against 7.65% a year ago — while flagging short supplies of high-demand models that left bookings pending.

Commercial Vehicle retails at 99,666 units grew 24.04% YoY — **the highest July ever**, knocking on the door of the one-lakh mark — and 4.94% MoM. Rural again led decisively, growing 29.37% YoY against Urban's 19.36%, confirming that goods-movement demand continues to broaden beyond the metros. LCVs grew 27.65% YoY, MCVs 25.00% and HCVs 16.72%, with HCVs up a sharp 13.00% MoM as dealers cited cement, steel and mining-linked movement, e-commerce logistics and improving finance availability, even as school-bus season demand tapered. CV EV share at 3.57% marked another all-time high against 1.65% a year ago. Dealers nonetheless remain watchful of the July price increases and input-cost pressures on fleet operators' ownership economics.

Passenger Vehicle retails came in at 4,16,555 units, up 19.13% YoY — the first time PV has crossed the 4-lakh mark in a July — though 1.68% lower MoM. The Bharat-led character deepened, with Rural PV growing 24.72% YoY against Urban's 15.76%. Dealers credited GST 2.0 affordability, new launches and scheme support — 44.05% said OEM schemes supported July bookings — even as consumer hesitation around the E20 transition nudged buyers towards CNG, hybrids and EVs. The result is a fuel-mix moment of real significance: **alternative-fuel share (CNG 24.67%, Hybrid 8.02%, EV 7.90%) reached 40.59%, within 1.09 percentage points of petrol's 41.68%** — a gap that stood at 13.21 points only a year ago — setting up a potential historic crossover in the coming months. On the channel side, **PV inventory rose by another day over June-end to 33–35 days**, well above FADA's recommended 21-day benchmark. With festive stocking now beginning, half of PV dealers already reporting higher inventory and about a quarter carrying over 25% aged stock, we urge PV OEMs to align dispatches strictly with retail so that dealer capital is not trapped in aged inventory.

Three-Wheelers at 1,33,778 units (+16.16% YoY) recorded their best July ever with EV penetration at 65.08%; Tractors at 1,17,349 units surged 28.10% YoY and 12.10% MoM — also a July record — with Rural growth of 28.83% YoY and 13.62% MoM reflecting catch-up Kharif sowing; and Wheeled Construction Equipment at 5,501 units rose 46.07% YoY on infrastructure momentum. **Total EV retails touched 3,27,901 units — the highest for any month in history** — with 2W and CV EV volumes at all-time records, taking overall EV penetration to about 12.7% from 9.6% a year ago. With FY'27's first four months up 18.27%, the runway into the festive season is firmly intact.**"**

## Near-Term Outlook (August'26)

Looking ahead to August'26, dealer optimism firms considerably: **74.30% of dealers expect growth, 22.90% a flat market and only 2.80% foresee de-growth** — a marked step-up from the 51.24% who expected growth heading into July. Expectations centre on the festive curtain-raiser — Independence Day launches, Onam (16–26 Aug) and Raksha Bandhan (28 Aug) — supported by monsoon-fed rural cashflows and a favourable base, as purchases last

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August were deferred ahead of the GST rate-cut announcement. Booking pipelines are already building: 53.57% of PV dealers report festive pipelines forming, as do 42.31% in CV and 41.24% in 2W.

In Two-Wheelers, rural sentiment should continue mending as rainfall has recovered, though Kharif sowing still trails last year by about 4.7% and **forecasts of a below-normal August make rainfall the single biggest swing factor for Bharat**. Passenger Vehicles enter August with healthy pipelines and fresh launches, but need clear and confident consumer communication on the E20 fuel transition to convert hesitant petrol buyers, alongside disciplined dispatches given elevated inventory. Commercial Vehicles should stay steady on freight, infrastructure and e-commerce activity, with price-hike absorption the key watch-out.

Overall, the outlook for August'26 appears **Optimistic**.

## Next 3 Months Outlook (August-September-October'26)

For the August-September-October'26 period, dealer confidence is the strongest the survey has recorded in recent history: **87.85% of dealers expect growth — up sharply from 66.17% last month** — with only 8.88% expecting a flat market and just 3.27% de-growth. Dealers rank festive demand underdelivering versus these elevated expectations as the single biggest risk (29.90% in 2W and 27.06% in PV), followed by currency and crude-linked volatility and, in PV, inventory pile-up (20.00%); notably, 46.15% of CV dealers see no major risk at all.

FADA would, however, counsel reading the coming months' prints with care. August and September retails will be flattered by last year's low base, when buyers deferred purchases awaiting GST 2.0 implementation; October then meets an unusually high base — last year's GST-cut-fuelled festive surge — with Dhanteras and Diwali shifting into November this year. **The quarter's true test is therefore festive conversion in showrooms, not year-on-year optics.** With FY'27's first four months up a record 18.27%, GST 2.0 affordability intact, the repo rate steady at 5.25%, PM E-DRIVE accelerating electrification and rural cashflows rebuilding on a recovered monsoon, the structural India Growth Story runway into the festive season remains firmly supportive.

Overall, the next three months appear **Decisively Constructive** — with the monsoon's August behaviour and festive conversion in showrooms the key monitorables.

## Key Findings from our Online Members Survey

- **Liquidity**
  - Good 47.66%
  - Neutral 43.93%
  - Bad 08.41%

- **Sentiment**
  - Good 45.33%
  - Neutral 43.93%
  - Bad 10.75%

- **Expectation from August'26**
  - Growth 74.30%
  - Flat 22.90%
  - De-growth 02.80%

- **Expectation in next 3 months (August-September-October'26)**

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- Growth 87.85%
- Flat 08.88%
- De-growth 03.27%

## Charts showing Vehicle Retail Data for various period

All India Vehicle Retail Data for FY'27 YTD (Apr'26 to Jul'26)

| CATEGORY | YTD FY'27 | YTD FY'26 | Growth % |
|---|---|---|---|
| 2W | 75,11,630 | 63,92,063 | 17.51% |
| 3W | 4,84,095 | 4,29,576 | 12.69% |
| CV | 3,84,254 | 3,27,205 | 17.44% |
| Wheeled - CE | 22,660 | 25,473 | -11.04% |
| PV | 16,87,040 | 13,73,821 | 22.80% |
| TRAC | 3,86,648 | 3,09,896 | 24.77% |
| **Total** | **1,04,76,327** | **88,58,034** | **18.27%** |

**Source:** FADA Research

All India Vehicle Retail Data for Jul'26

| CATEGORY | Jul'26 | Jun'26 | Jul'25 | MoM% | YoY% |
|---|---|---|---|---|---|
| 2W | 18,18,289 | 18,41,460 | 14,17,767 | -1.26% | 28.25% |
| 3W | 1,33,778 | 1,25,158 | 1,15,166 | 6.89% | 16.16% |
| *E-RICKSHAW(P)* | *34,722* | *32,131* | *39,777* | 8.06% | -12.71% |
| *E-RICKSHAW WITH CART (G)* | *7,280* | *7,303* | *6,888* | -0.31% | 5.69% |
| *THREE-WHEELER (GOODS)* | *15,366* | *14,889* | *10,453* | 3.20% | 47.00% |
| *THREE-WHEELER (PASSENGER)* | *76,236* | *70,711* | *57,952* | 7.81% | 31.55% |
| *THREE-WHEELER (PERSONAL)* | *174* | *124* | *96* | 40.32% | 81.25% |
| PV | 4,16,555 | 4,23,677 | 3,49,674 | -1.68% | 19.13% |
| TRAC | 1,17,349 | 1,04,687 | 91,604 | 12.10% | 28.10% |
| Wheeled - CE | 5,501 | 5,308 | 3,766 | 3.64% | 46.07% |
| CV | 99,666 | 94,972 | 80,348 | 4.94% | 24.04% |
| *LCV* | *61,634* | *59,549* | *48,284* | 3.50% | 27.65% |
| *MCV* | *9,925* | *10,532* | *7,940* | -5.76% | 25.00% |
| *HCV* | *28,070* | *24,840* | *24,048* | 13.00% | 16.72% |
| *Others* | *37* | *51* | *76* | -27.45% | -51.32% |
| **Total** | **25,91,138** | **25,95,262** | **20,58,325** | **-0.16%** | **25.89%** |

**Source:** FADA Research

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## Chart showing Fuel Wise Vehicle Retail Market Share for Jul’26

All India Fuel Wise Vehicle Retail Data for Jul’26

| Two-Wheeler | Jul'26 | Jun'26 | Jul'25 |
|---|---|---|---|
| PETROL/ETHANOL | 88.67% | 89.34% | 92.07% |
| EV | 11.24% | 10.59% | 7.65% |
| CNG/LPG | 0.09% | 0.07% | 0.27% |
| **Total** | **100%** | **100%** | **100%** |

| Three-Wheeler | Jul'26 | Jun'26 | Jul'25 |
|---|---|---|---|
| EV | 65.08% | 62.66% | 60.33% |
| CNG/LPG | 21.55% | 22.86% | 27.77% |
| DIESEL | 13.09% | 14.18% | 11.54% |
| PETROL/ETHANOL | 0.28% | 0.30% | 0.37% |
| **Total** | **100%** | **100%** | **100%** |

| Commercial Vehicle | Jul'26 | Jun'26 | Jul'25 |
|---|---|---|---|
| Diesel | 80.40% | 80.67% | 81.94% |
| CNG/LPG | 12.75% | 12.37% | 11.84% |
| PETROL/ETHANOL | 3.25% | 3.38% | 4.50% |
| EV | 3.57% | 3.54% | 1.65% |
| HYBRID | 0.03% | 0.04% | 0.07% |
| **Total** | **100%** | **100%** | **100%** |

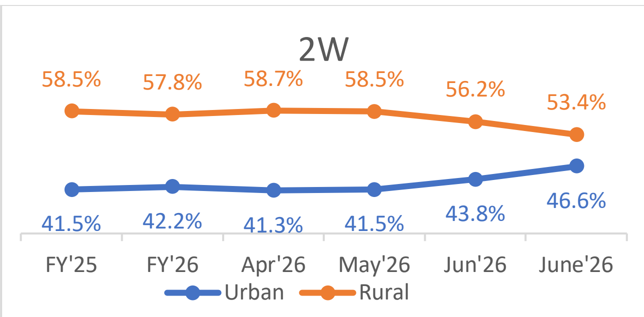
| Wheeled Construction Equipment | Jul'26 | Jun'26 | Jul'25 |
|---|---|---|---|
| Diesel | 100% | 99.98% | 98.94% |
| CNG/LPG | 0.0% | 0.00% | 0.00% |
| PETROL/ETHANOL | 0.0% | 0.00% | 0.00% |
| EV | 0.0% | 0.00% | 1.04% |
| HYBRID | 0.00% | 0.02% | 0.03% |
| **Total** | **100%** | **100%** | **100%** |

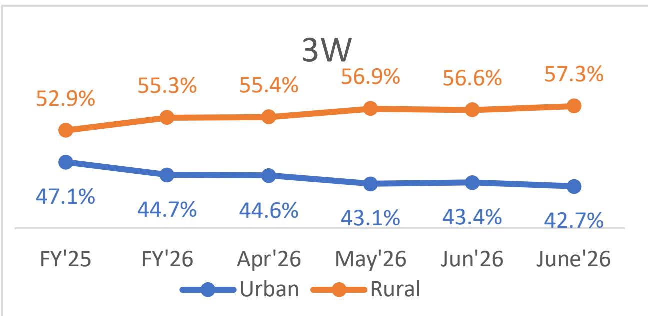
| Passenger Vehicle | Jul'26 | Jun'26 | Jul'25 |
|---|---|---|---|
| PETROL/ETHANOL | 41.68% | 43.15% | 47.62% |
| Diesel | 17.73% | 16.32% | 17.97% |
| CNG/LPG | 24.67% | 24.35% | 21.38% |
| HYBRID | 8.02% | 8.27% | 7.89% |
| EV | 7.90% | 7.91% | 5.14% |
| **Total** | **100%** | **100%** | **100%** |

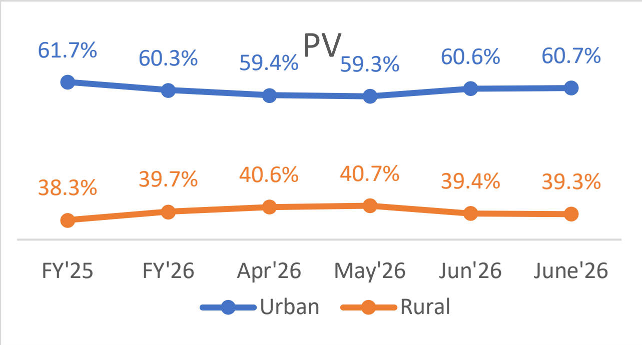
| Tractor | Jul'26 | Jun'26 | Jul'25 |
|---|---|---|---|
| Diesel | 99.88% | 99.98% | 99.99% |
| PETROL/ETHANOL | 0.00% | 0.01% | 0.00% |
| EV | 0.12% | 0.01% | 0.00% |
| **Total** | **100%** | **100%** | **100%** |

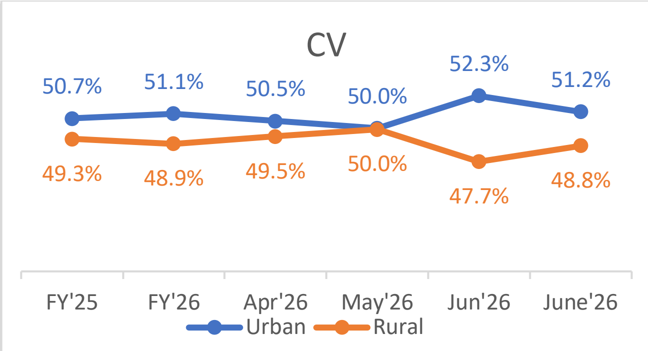
**Source**: FADA Research

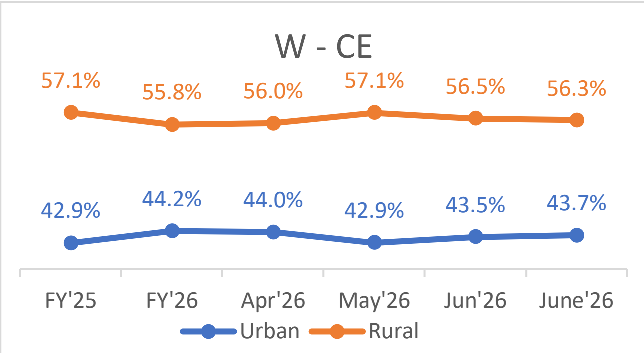
## All India Vehicle Retail Strength Index for Jul'26 on basis of Urban & Rural RTOs.

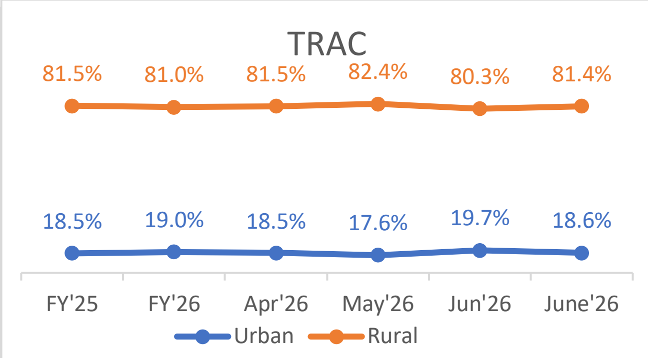


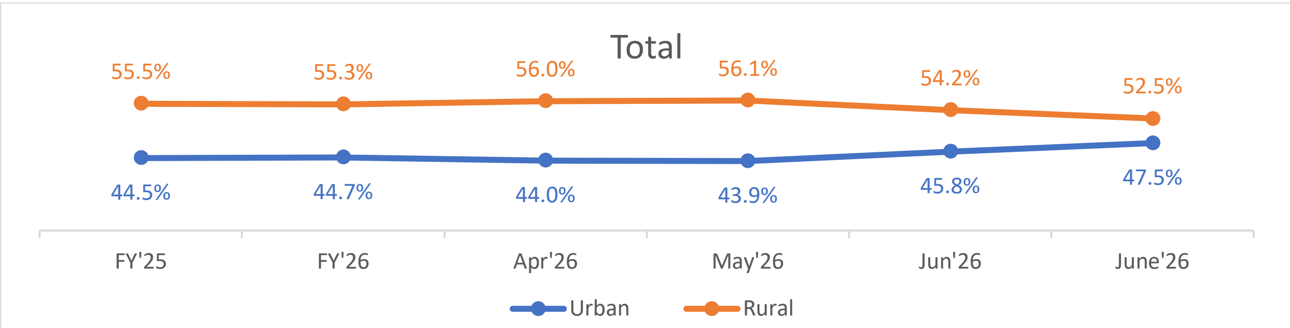






**Source:** FADA Research

## All India Vehicle Retail Strength YoY and MOM comparison for Jul'26.

| Category | MoM% | YoY% | Category | MoM% | YoY% |
|---|---|---|---|---|---|
| **2W** | | | **CV** | | |
| Urban | 5.04% | 27.86% | Urban | 2.70% | 19.36% |
| Rural | -6.16% | 28.59% | Rural | 7.41% | 29.37% |
| **Total** | -1.26% | 28.25% | **Total** | 4.94% | 24.04% |
| **3W** | | | **Wheeled - CE** | | |
| Urban | 5.16% | 8.25% | Urban | 4.07% | 35.06% |
| Rural | 8.21% | 22.85% | Rural | 3.30% | 55.94% |
| **Total** | 6.89% | 16.16% | **Total** | 3.64% | 46.07% |
| **PV** | | | **TRAC** | | |
| Urban | -1.50% | 15.76% | Urban | 5.87% | 25.03% |
| Rural | -1.95% | 24.72% | Rural | 13.62% | 28.83% |

| | | | | | |
|---|---|---|---|---|---|
| **Total** | -1.68% | 19.13% | **Total** | 12.10% | 28.10% |
| **Total** | | | | | |
| Urban | 3.55% | 23.76% | | | |
| Rural | -3.29% | 27.87% | | | |
| **Total** | -0.16% | 25.89% | | | |

**Source:** FADA Research

**Disclaimer:**

1- Vehicle Retail Data has been collated as on 05.08.26 in collaboration with Ministry of Road Transport & Highways, Government of India and has been gathered from 1,465 out of 1,468 RTOs.

2- Commercial Vehicle 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)

3- 3-Wheeler is sub-divided in the following manner
   a. E-Rickshaw – Passenger
   b. E-Rickshaw – Goods
   c. 3-Wheeler – Goods
   d. 3-Wheeler – Passenger
   e. 3-Wheeler – Personal

4- For the month of Jul’26, Vehicle Registration Data for 3W, CV and Trac categories are not available for Telangana (TS)

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

**Jul’26 category-wise OEM market share can be found in Annexure 2, Page No. 09**

***Media Kit***

<table>
<tr><th>FADA Logo</th><th>Mr. Sai Giridhar, Vice President – FADA</th></tr>
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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 Dealerships having over 30,000 dealership outlets including multiple Associations of Automobile Dealers at the Regional, State and City levels representing the entire Auto Retail Industry. Together we employ ~5 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 Jul'26 (YoY comparison)

| Two-Wheeler OEM | Jul'26 | Market Share (%) Jul'26 | Jul'25 | Market Share (%) Jul'25 |
|---|---|---|---|---|
| HONDA MOTORCYCLE AND SCOOTER INDIA (P) LTD | 4,69,687 | 25.83% | 3,65,395 | 25.77% |
| HERO MOTOCORP LTD | 4,40,662 | 24.23% | 3,47,398 | 24.50% |
| TVS MOTOR COMPANY LTD | 3,74,113 | 20.58% | 2,80,337 | 19.77% |
| BAJAJ AUTO LTD | 1,80,183 | 9.91% | 1,46,667 | 10.34% |
| SUZUKI MOTORCYCLE INDIA PVT LTD | 1,02,668 | 5.65% | 93,984 | 6.63% |
| ROYAL-ENFIELD (UNIT OF EICHER LTD) | 95,080 | 5.23% | 72,207 | 5.09% |
| INDIA YAMAHA MOTOR PVT LTD | 67,781 | 3.73% | 52,486 | 3.70% |
| ATHER ENERGY LTD | 30,357 | 1.67% | 17,834 | 1.26% |
| OLA ELECTRIC TECHNOLOGIES PVT LTD | 14,106 | 0.78% | 18,450 | 1.30% |
| GREAVES ELECTRIC MOBILITY LTD | 10,125 | 0.56% | 4,266 | 0.30% |
| RIVER MOBILITY PVT LTD | 5,954 | 0.33% | 1,680 | 0.12% |
| BGAUSS AUTO PRIVATE LIMITED | 5,518 | 0.30% | 1,763 | 0.12% |
| CLASSIC LEGENDS PVT LTD | 4,541 | 0.25% | 2,465 | 0.17% |
| PIAGGIO VEHICLES PVT LTD | 3,684 | 0.20% | 2,754 | 0.19% |
| Others Including EV | 13,830 | 0.76% | 10,081 | 0.71% |
| **Total** | **18,18,289** | **100%** | **14,17,767** | **100%** |

**Source:** FADA Research

**Disclaimer:**

1. Vehicle Retail Data has been collated as on 05.08.26 in collaboration with Ministry of Road Transport & Highways, Government of India and has been gathered from 1,465 out of 1,468 RTOs.
2. Others include OEMs accounting less than 0.1% Market Share.

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| Three-Wheeler OEM | Jul'26 | Market Share (%) Jul'26 | Jul'25 | Market Share (%) Jul'25 |
|---|---|---|---|---|
| BAJAJ AUTO LTD | 44,908 | 33.57% | 41,767 | 36.27% |
| MAHINDRA & MAHINDRA LIMITED | 14,823 | 11.08% | 10,527 | 9.14% |
| *MAHINDRA LAST MILE MOBILITY LTD* | *14,807* | *11.07%* | *10,497* | *9.11%* |
| *MAHINDRA & MAHINDRA LIMITED* | *16* | *0.01%* | *30* | *0.03%* |
| PIAGGIO VEHICLES PVT LTD | 9,598 | 7.17% | 7,271 | 6.31% |
| TVS MOTOR COMPANY LTD | 7,294 | 5.45% | 4,415 | 3.83% |
| ATUL AUTO LTD | 3,066 | 2.29% | 2,378 | 2.06% |
| YC ELECTRIC VEHICLE | 2,388 | 1.79% | 3,631 | 3.15% |
| DILLI ELECTRIC AUTO PVT LTD | 1,843 | 1.38% | 1,919 | 1.67% |
| SAERA ELECTRIC AUTO PVT LTD | 1,815 | 1.36% | 2,205 | 1.91% |
| MINI METRO EV L.L.P | 1,581 | 1.18% | 1,087 | 0.94% |
| Others including EV | 46,462 | 34.73% | 39,966 | 34.70% |
| **Total** | **1,33,778** | **100%** | **1,15,166** | **100%** |

**Source:** FADA Research

**Disclaimer:**

1- For the month of Jul'26 numbers for 3W category are not available for Telangana (TS).
2- Vehicle Retail Data has been collated as on 05.08.26 in collaboration with Ministry of Road Transport & Highways, Government of India and has been gathered from 1,465 out of 1,468 RTOs.
3- Others include OEMs accounting less than 1% Market Share.

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| Commercial Vehicle OEM | Jul'26 | Market Share (%) Jul'26 | Jul'25 | Market Share (%) Jul'25 |
|---|---|---|---|---|
| TATA MOTORS LTD | 34,733 | 34.85% | 26,162 | 32.56% |
| MAHINDRA & MAHINDRA LIMITED | 26,055 | 26.14% | 21,296 | 26.50% |
| *MAHINDRA & MAHINDRA LIMITED* | *24,089* | *24.17%* | *19,791* | *24.63%* |
| *MAHINDRA LAST MILE MOBILITY LTD* | *1,966* | *1.97%* | *1,505* | *1.87%* |
| ASHOK LEYLAND LTD | 17,691 | 17.75% | 15,226 | 18.95% |
| *ASHOK LEYLAND LTD* | *17,499* | *17.56%* | *15,129* | *18.83%* |
| *SWITCH MOBILITY AUTOMOTIVE LTD* | *192* | *0.19%* | *97* | *0.12%* |
| VE COMMERCIAL VEHICLES LTD | 8,724 | 8.75% | 7,572 | 9.42% |
| *VE COMMERCIAL VEHICLES LTD* | *8,660* | *8.69%* | *7,491* | *9.32%* |
| *VE COMMERCIAL VEHICLES LTD (VOLVO BUSES DIVISION)* | *64* | *0.06%* | *81* | *0.10%* |
| MARUTI SUZUKI INDIA LTD | 4,460 | 4.47% | 3,634 | 4.52% |
| FORCE MOTORS LIMITED | 2,610 | 2.62% | 2,201 | 2.74% |
| SML MAHINDRA LTD | 1,845 | 1.85% | 1,793 | 2.23% |
| DAIMLER INDIA COMMERCIAL VEHICLES PVT. LTD | 1,667 | 1.67% | 1,460 | 1.82% |
| Others | 1,881 | 1.89% | 1,004 | 1.25% |
| **Total** | **99,666** | **100.00%** | **80,348** | **100.00%** |

**Source:** FADA Research

**Disclaimer:**

1- For the month of Jul'26 numbers for CV category are not available for Telangana (TS).
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| Wheeled - Construction Equipment OEM | Jul'26 | Market Share (%) Jul'26 | Jul'25 | Market Share (%) Jul'25 |
|---|---|---|---|---|
| JCB INDIA LIMITED | 2,561 | 46.56% | 1,839 | 48.83% |
| ACTION CONSTRUCTION EQUIPMENT LTD. | 652 | 11.85% | 415 | 11.02% |
| ESCORTS KUBOTA LIMITED (CONSTRUCTION EQUIPMENT) | 462 | 8.40% | 213 | 5.66% |
| AJAX ENGINEERING LTD | 363 | 6.60% | 199 | 5.28% |
| BULL MACHINES PVT LTD | 182 | 3.31% | 112 | 2.97% |
| TATA HITACHI CONSTRUCTION MACHINERY COMP. PVT LTD | 134 | 2.44% | 62 | 1.65% |
| CATERPILLAR INDIA PRIVATE LIMITED | 109 | 1.98% | 88 | 2.34% |
| CASE NEW HOLLAND CONSTRUCTION EQUIPMENT(I) PVT LTD | 98 | 1.78% | 41 | 1.09% |
| ALL TERRAIN CRANE | 74 | 1.35% | 179 | 4.75% |
| INDO FARM EQUIPMENT LIMITED | 73 | 1.33% | 54 | 1.43% |
| M/S SCHWING STETTER (INDIA) PRIVATE LIMITED | 70 | 1.27% | 45 | 1.19% |
| DOOSAN BOBCAT INDIA PVT LTD | 65 | 1.18% | 28 | 0.74% |
| LIUGONG INDIA PVT. LTD | 60 | 1.09% | 9 | 0.24% |
| Others | 598 | 10.87% | 482 | 12.80% |
| **Total** | **5,501** | **100.00%** | **3,766** | **100.00%** |

**Source:** FADA Research

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

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| PV OEM | Jul'26 | Market Share (%) Jul'26 | Jul'25 | Market Share (%) Jul'25 |
|---|---|---|---|---|
| MARUTI SUZUKI INDIA LTD | 1,61,873 | 38.86% | 1,35,232 | 38.67% |
| TATA MOTORS LTD | 58,774 | 14.11% | 42,950 | 12.28% |
| MAHINDRA & MAHINDRA LIMITED | 56,219 | 13.50% | 45,451 | 13.00% |
| HYUNDAI MOTOR INDIA LTD | 47,853 | 11.49% | 45,278 | 12.95% |
| TOYOTA KIRLOSKAR MOTOR PVT LTD | 29,443 | 7.07% | 27,733 | 7.93% |
| KIA INDIA PRIVATE LIMITED | 25,551 | 6.13% | 20,971 | 6.00% |
| SKODA AUTO VOLKSWAGEN GROUP | 8,221 | 1.97% | 8,902 | 2.55% |
| *SKODA AUTO VOLKSWAGEN INDIA PVT LTD* | *8,153* | 1.96% | *8,809* | 2.52% |
| *VOLKSWAGEN AG/INDIA PVT. LTD.* | *46* | 0.01% | *53* | 0.02% |
| *AUDI AG* | *14* | 0.00% | *40* | 0.01% |
| *SKODA AUTO INDIA/AS PVT LTD* | *8* | 0.00% | *-* | 0.00% |
| JSW MG MOTOR INDIA PVT LTD | 7,030 | 1.69% | 6,927 | 1.98% |
| HONDA CARS INDIA LTD | 5,822 | 1.40% | 4,827 | 1.38% |
| RENAULT INDIA PVT LTD | 3,505 | 0.84% | 2,313 | 0.66% |
| NISSAN MOTOR INDIA PVT LTD | 2,698 | 0.65% | 1,555 | 0.44% |
| BMW INDIA PVT LTD | 1,702 | 0.41% | 1,427 | 0.41% |
| MERCEDES -BENZ GROUP | 1,527 | 0.37% | 1,466 | 0.42% |
| *MERCEDES-BENZ INDIA PVT LTD* | *1,305* | 0.31% | *1,353* | 0.39% |
| *MERCEDES -BENZ AG* | *220* | 0.05% | *111* | 0.03% |
| *DAIMLER AG* | *-* | 0.00% | *2* | 0.00% |
| *MERCEDES BENZ* | *2* | 0.00% | *-* | 0.00% |
| VINFAST AUTO INDIA PVT LTD | 1,482 | 0.36% | - | 0.00% |
| FORCE MOTORS LIMITED | 1,193 | 0.29% | 581 | 0.17% |
| STELLANTIS GROUP | 1,168 | 0.28% | 874 | 0.25% |
| *STELLANTIS AUTOMOBILES INDIA PVT LTD* | *950* | 0.23% | *585* | 0.17% |
| *STELLANTIS INDIA PVT LTD* | *218* | 0.05% | *289* | 0.08% |
| BYD INDIA PRIVATE LIMITED | 749 | 0.18% | 613 | 0.18% |
| JAGUAR LAND ROVER INDIA LIMITED | 603 | 0.14% | 526 | 0.15% |
| Others | 1,142 | 0.27% | 2,048 | 0.59% |
| **Total** | **4,16,555** | **100.0%** | **3,49,674** | **100.0%** |

**Source:** FADA Research

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| Tractor OEM | Jul'26 | Market Share (%) Jul'26 | Jul'25 | Market Share (%) Jul'25 |
|---|---|---|---|---|
| MAHINDRA & MAHINDRA LIMITED (TRACTOR) | 26,863 | 22.89% | 20,617 | 22.51% |
| MAHINDRA & MAHINDRA LIMITED (SWARAJ DIVISION) | 22,334 | 19.03% | 16,733 | 18.27% |
| INTERNATIONAL TRACTORS LIMITED | 15,991 | 13.63% | 12,824 | 14.00% |
| TAFE LIMITED | 14,178 | 12.08% | 9,655 | 10.54% |
| ESCORTS KUBOTA LIMITED (AGRI MACHINERY GROUP) | 12,782 | 10.89% | 9,202 | 10.05% |
| JOHN DEERE INDIA PVT LTD (TRACTOR DEVISION) | 8,087 | 6.89% | 6,986 | 7.63% |
| EICHER TRACTORS | 7,910 | 6.74% | 6,321 | 6.90% |
| CNH INDUSTRIAL (INDIA) PVT LTD | 5,417 | 4.62% | 3,932 | 4.29% |
| Others | 3,787 | 3.23% | 5,334 | 5.82% |
| **Total** | **1,17,349** | **100%** | **91,604** | **100%** |

**Source:** FADA Research

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