

FOR IMMEDIATE RELEASE

FADA Releases FY20-21 & April'21 Vehicle Registration Data

- *For FY 20-21, total vehicle registrations were down by -30% (below FY12-13 levels). Except Tractors which grew by 16%, all other categories were in red with 2W, 3W, CV and PV falling by -32%, -64%, -49% and -14% respectively and way below FY13 levels (lowest in last 8 years)*
- *Total vehicle registration for the month of April'21 plummets by -28% MoM. All categories declined with 2W, 3W, PV, Trac and CV falling by -28%, -43%, -25%, -45% and -24% respectively.*
- *As mentioned in our last Press Release, the 2nd wave of covid has not only created havoc in urban but has also unsettled rural India this time around as demand trend in 1st 9 days of May shows extremely weak consumer sentiment with almost 95% India under lockdown (full as well as partial) except Telangana.*
- *FADA appeals to all Auto OEMs to handhold their Dealers the way they did during last wave of covid in 2020 and not burden them with high inventory.*
- *FADA also requests the Central Government to announce a financial package in terms of moratorium and RBI to release guidelines for relaxation of loan re-payment equivalent to number of days of lockdown each state has declared.*

10th May'21, New Delhi: The Federation of Automobile Dealers Associations (FADA) today released Monthly Vehicle Registration Data for FY 20-21 as well as April'21.

April'21 Registration

Unlike other months, we can't represent a YoY comparison since India was under complete lockdown in April 2020 and not a single vehicles could be sold. Hence, all comparisons for this month has been done on MoM basis.

Commenting on how April'21 performed, FADA President, Mr. Vinkesh Gulati said, **"India is currently facing one of its toughest times with 2nd wave of covid creating a havoc in everyone's life. This time, the spread is not only limited to urban markets but has also taken rural India in its grasp.**

Auto Registrations for the month of April witnessed double digit fall to the tune of -28% MoM, as most of the Indian states started going under lockdown (partial as well as full) beginning April 5th onwards. The spread started with Maharashtra followed by Chhattisgarh, Delhi, Rajasthan and other Indian States following the suit. Not surprisingly, all categories hence closed the month in red with 2W down by -28%, 3W by -43%, PV by -25%, Tractors by -45% and CV by -24% respectively on a MoM basis.

Unlike last year, the lockdown this time around has been imposed by State Governments and not the Central. Due to this, there has been no relief announcements which has come out till now either by the Center or RBI and Auto OEMs.

FADA humbly requests Auto OEMs (our Principals) to handhold their dealers the way they did last year during the 1st phase of pandemic as situation is very grim in most of the states and Dealer



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Principals as well as their teams are fighting for their survival from Covid. FADA also requests OEMs to not burden dealers with high billings all the states where lockdown has been announced.

FADA also requests the Government to come out with financial package, the way they did last year. We also request RBI to come out with guidelines/notifications for relaxation of loan re-payment equivalent to the tune of number of days of lockdown each state has announced.”

Near Term Outlook

The 1st 9 days of May has seen extremely lean sales due to lockdown announced by majority of states. Lockdown also means dealership outlets to remain closed thus meaning zero sales. Considering the rising number of cases, one can expect the peak in terms of infections for India on a whole could be at least a fortnight away. Even where, Dealerships are open, the walk-ins have dropped to 30% and customers are delaying their purchase decision.

The just-concluded elections in states like West Bengal, Tamil Nadu, Kerala and Assam, movement of migrant workers back to states like Uttar Pradesh and Bihar can keep the curve rising. Overall, FADA hence maintains absolute sluggishness for the month of May as most of the states have announced extension of lockdown till the end of the month.

Long Term Outlook

The 2nd wave of covid has not only unsettled urban but also the rural markets this time around. Recovery hence looks to take a longer time when compared to recovery which came after 1st wave.

The only ray of hope lies on Monsoon’s on time arrival which is likely to enter India through the southern coast around June 1. The country’s weather office has also said that India is expected to get average monsoon rains this year, thus raising expectations of higher farm output, which is central to the country’s economy. This will also lead to rural markets recovering faster than urban. Also categories like Tractors and 2-Wheelers will have a rub off effect in terms of recovery.

FADA see’s overall recovery from the lows of FY21 and to reach the highs of FY19 only by FY23.

- Inventory at the end of April’21
 - Average inventory for Passenger Vehicles ranges from 15 – 17 days
 - Average inventory for Two-Wheeler ranges from 30 – 35 days

Chart showing Vehicle Registration Data

All India Vehicle Registration Data for FY 20-21

Category	FY'20	FY'21	YoY %
2W	1,68,38,965	1,15,33,336	-31.51%
3W	7,19,594	2,58,174	-64.12%
CV	8,81,114	4,48,914	-49.05%
PV	27,73,514	23,86,316	-13.96%
TRACTOR	5,55,315	6,44,779	16.11%
Total	2,17,68,502	1,52,71,519	-29.85%



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Source: FADA Research

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All India Vehicle Registration Data for April'21

CATEGORY	APR'21	APR'19	% Change w.r.t. APR'19	MAR'21	MoM %
2W	8,65,134	13,38,278	-35.35%	11,95,445	-27.63%
3W	21,636	48,722	-55.59%	38,034	-43.11%
PV	2,08,883	2,36,188	-11.56%	2,79,745	-25.33%
TRACTOR	38,285	36,984	3.52%	69,082	-44.58%
CV	51,436	78,630	-34.58%	67,372	-23.65%
LCV	28,511	43,881	-35.03%	38,450	-25.85%
MCV	3,547	4,716	-24.79%	4,663	-23.93%
HCV	16,062	27,100	-40.73%	18,609	-13.69%
Others	3,316	2,933	13.06%	5,650	-41.31%
Total	11,85,374	17,38,802	-31.83%	16,49,678	-28.15%

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 Registration Data has been collated as on 08.05.21 in collaboration with Ministry of Road Transport & Highways, Government of India and has been gathered from 1,289 out of 1,493 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

FY 20-21 Category-wise market share can be found in Annexure 1, Page No. 4

April'21 Category-wise market share can be found in Annexure 2, Page No. 8

----- 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.

Annexure 1

OEM wise Market Share Data for FY'21 with YoY comparison

Two-Wheeler (2W)				
Two-Wheeler OEM	FY'21	Market Share (%), FY'21	FY'20	Market Share (%), FY'20
HERO MOTOCORP LTD	41,29,740	35.81%	62,98,508	37.40%
HONDA MOTORCYCLE AND SCOOTER INDIA (P) LTD	29,66,821	25.72%	41,98,259	24.93%
TVS MOTOR COMPANY LTD	17,05,416	14.79%	23,87,266	14.18%
BAJAJ AUTO LTD	12,85,670	11.15%	20,19,170	11.99%
ROYAL-ENFIELD (UNIT OF EICHER LTD)	4,82,146	4.18%	6,39,385	3.80%
SUZUKI MOTORCYCLE INDIA PVT LTD	4,31,746	3.74%	5,99,389	3.56%
INDIA YAMAHA MOTOR PVT LTD	4,27,314	3.71%	5,59,484	3.32%
PIAGGIO VEHICLES PVT LTD	37,377	0.32%	63,720	0.38%
CLASSIC LEGENDS PVT LTD	20,801	0.18%	27,318	0.16%
BMW INDIA PVT LTD	2,080	0.02%	2,828	0.02%
ADISHWAR AUTO RIDE INDIA PVT LTD	1,433	0.01%	2,379	0.01%
INDIA KAWASAKI MOTORS PVT LTD	976	0.01%	3,075	0.02%
H-D MOTOR COMPANY INDIA PVT LTD	907	0.01%	2,652	0.02%
TRIUMPH MOTORCYCLES (INDIA) PVT LTD	639	0.01%	939	0.01%
DUCATI INDIA PVT LTD	165	0.00%	336	0.00%
DUCATI MOTOR HOLDING S.P.A	11	0.00%	84	0.00%
Others including EV	40,094	0.35%	34,173	0.20%
Total	1,15,33,336	100.00%	1,68,38,965	100.00%

Source: FADA Research



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Three-Wheeler (3W)				
Three-Wheeler OEM	FY'21	Market Share (%), FY'21	FY'20	Market Share (%), FY'20
BAJAJ AUTO LTD	94,637	36.66%	3,18,609	44.28%
PIAGGIO VEHICLES PVT LTD	47,327	18.33%	1,34,596	18.70%
ATUL AUTO LTD	10,677	4.14%	47,050	6.54%
MAHINDRA & MAHINDRA LIMITED	9,916	3.84%	48,527	6.74%
YC ELECTRIC VEHICLE	8,936	3.46%	14,450	2.01%
TVS MOTOR COMPANY LTD	6,818	2.64%	12,778	1.78%
SAERA ELECTRIC AUTO PVT LTD	3,937	1.52%	5,533	0.77%
MAHINDRA REVA ELECTRIC VEHICLES PVT LTD	3,217	1.25%	2,995	0.42%
CHAMPION POLY PLAST	3,071	1.19%	4,382	0.61%
Others including EV	69,638	26.97%	1,30,674	18.16%
Total	2,58,174	100.00%	7,19,594	100.00%

Source: FADA Research

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Commercial Vehicle (CV)				
Commercial Vehicle OEM	FY'21	Market Share (%), FY'21	FY'20	Market Share (%), FY'20
TATA MOTORS LTD	1,63,042	36.32%	3,72,752	42.30%
MAHINDRA & MAHINDRA LIMITED	1,29,005	28.74%	2,18,660	24.82%
ASHOK LEYLAND LTD	58,066	12.93%	1,33,167	15.11%
MARUTI SUZUKI INDIA LTD	24,378	5.43%	27,483	3.12%
VE COMMERCIAL VEHICLES LTD	23,354	5.20%	47,294	5.37%
DAIMLER INDIA COMMERCIAL VEHICLES PVT. LTD	7,858	1.75%	16,172	1.84%
FORCE MOTORS LIMITED, A FIRODIA ENTERPRISE	4,151	0.92%	14,100	1.60%
SML ISUZU LTD	3,532	0.79%	10,690	1.21%
Others	35,528	7.91%	40,796	4.63%
Total	4,48,914	100.00%	8,81,114	100.00%

Source: FADA Research

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Passenger Vehicle (PV)				
Passenger Vehicle OEM	FY'21	Market Share (%), FY'21	FY'20	Market Share (%), FY'20
MARUTI SUZUKI INDIA LTD	11,62,752	48.73%	13,40,430	48.33%
HYUNDAI MOTOR INDIA LTD	4,14,304	17.36%	4,65,522	16.78%
TATA MOTORS LTD	1,87,809	7.87%	1,62,489	5.86%
KIA MOTORS INDIA PVT LTD	1,31,274	5.50%	62,835	2.27%
MAHINDRA & MAHINDRA LIMITED	1,27,623	5.35%	2,12,797	7.67%
TOYOTA KIRLOSKAR MOTOR PVT LTD	77,236	3.24%	1,09,989	3.97%
RENAULT INDIA PVT LTD	75,286	3.15%	85,649	3.09%
HONDA CARS INDIA LTD	71,423	2.99%	1,16,264	4.19%
FORD INDIA PVT LTD	41,875	1.75%	65,384	2.36%
MG MOTOR INDIA PVT LTD	26,739	1.12%	19,011	0.69%
SKODA AUTO VOLKSWAGEN INDIA PVT LTD	22,359	0.94%	68	0.00%
NISSAN MOTOR INDIA PVT LTD	12,287	0.51%	24,866	0.90%
MERCEDES-BENZ INDIA PVT LTD	6,835	0.29%	11,389	0.41%
BMW INDIA PVT LTD	5,824	0.24%	9,999	0.36%
FIAT INDIA AUTOMOBILES PVT LTD	5,149	0.22%	9,948	0.36%
VOLKSWAGEN AG/INDIA PVT. LTD.	1,814	0.08%	25,839	0.93%
JAGUAR LAND ROVER INDIA LIMITED	1,696	0.07%	3,756	0.14%
SKODA AUTO INDIA/AS PVT LTD	1,408	0.06%	14,389	0.52%
FORCE MOTORS LIMITED, A FIRODIA ENTERPRISE	1,373	0.06%	7,401	0.27%
VOLVO AUTO INDIA PVT LTD	1,197	0.05%	2,034	0.07%
AUDI AG	404	0.02%	4,233	0.15%
MERCEDES -BENZ AG	252	0.01%	5	0.00%
PORSCHE AG GERMANY	249	0.01%	387	0.01%
AUTOMOBILI LAMBORGHINI S.P.A	26	0.00%	13	0.00%
ROLLS ROYCE	21	0.00%	26	0.00%
FERRARI INDIA PRIVATE LIMITED	16	0.00%	25	0.00%
BENTLEY MOTORS LTD	12	0.00%	29	0.00%
Others	9,073	0.38%	18,737	0.68%
Total	23,86,316	100.00%	27,73,514	100.00%

Source: FADA Research

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Tractor (TRAC)				
Tractor OEM	FY'21	Market Share (%), FY'21	FY'20	Market Share (%), FY'20
MAHINDRA & MAHINDRA LIMITED (TRACTOR)	1,49,683	23.21%	1,30,557	23.51%
MAHINDRA & MAHINDRA LIMITED (SWARAJ DIVISION)	1,06,446	16.51%	89,329	16.09%
INTERNATIONAL TRACTORS LIMITED	80,998	12.56%	67,249	12.11%
TAFE LIMITED	75,542	11.72%	62,575	11.27%
ESCORTS LIMITED (AGRI MACHINERY GROUP)	70,681	10.96%	63,119	11.37%
JOHN DEERE INDIA PVT LTD(TRACTOR DEVISION)	50,098	7.77%	42,582	7.67%
EICHER TRACTORS	40,817	6.33%	38,313	6.90%
CNH INDUSTRIAL (INDIA) PVT LTD	24,506	3.80%	21,091	3.80%
KUBOTA AGRICULTURAL MACHINERY INDIA PVT.LTD.	11,375	1.76%	8,270	1.49%
V.S.T. TILLERS TRACTORS LIMITED	5,991	0.93%	5,614	1.01%
FORCE MOTORS LIMITED, A FIRODIA ENTERPRISE	3,609	0.56%	3,143	0.57%
CAPTAIN TRACTORS PVT. LTD.	2,893	0.45%	2,123	0.38%
INDO FARM EQUIPMENT LIMITED	1,767	0.27%	1,949	0.35%
Others	20,373	3.16%	19,401	3.49%
Total	6,44,779	100.00%	5,55,315	100.00%

Source: FADA Research

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Annexure 2

OEM wise Market Share Data for the Month of April'21 with MoM comparison

Two-Wheeler (2W)				
Two-Wheeler OEM	APR'21	Market Share (%) , APR'21	MAR'21	Market Share (%) , MAR'21
HERO MOTOCORP LTD	2,99,576	34.63%	3,96,573	33.17%
HONDA MOTORCYCLE AND SCOOTER INDIA (P) LTD	2,17,832	25.18%	3,13,101	26.19%
TVS MOTOR COMPANY LTD	1,28,365	14.84%	1,78,377	14.92%
BAJAJ AUTO LTD	98,041	11.33%	1,37,352	11.49%
ROYAL-ENFIELD (UNIT OF EICHER LTD)	42,120	4.87%	60,189	5.03%
INDIA YAMAHA MOTOR PVT LTD	34,817	4.02%	44,055	3.69%
SUZUKI MOTORCYCLE INDIA PVT LTD	33,699	3.90%	47,754	3.99%
PIAGGIO VEHICLES PVT LTD	3,262	0.38%	4,764	0.40%
CLASSIC LEGENDS PVT LTD	2,036	0.24%	2,505	0.21%
BMW INDIA PVT LTD	230	0.03%	286	0.02%
ADISHWAR AUTO RIDE INDIA PVT LTD	141	0.02%	178	0.01%
INDIA KAWASAKI MOTORS PVT LTD	97	0.01%	135	0.01%
TRIUMPH MOTORCYCLES (INDIA) PVT LTD	37	0.00%	68	0.01%
H-D MOTOR COMPANY INDIA PVT LTD	19	0.00%	23	0.00%
DUCATI INDIA PVT LTD	14	0.00%	19	0.00%
Others including EV	4,848	0.56%	10,066	0.84%
Total	8,65,134	100.00%	11,95,445	100.00%

Source: FADA Research

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Three-Wheeler (3W)				
Three-Wheeler OEM	APR'21	Market Share (%), APR'21	MAR'21	Market Share (%), MAR'21
BAJAJ AUTO LTD	7,741	35.78%	13,389	35.20%
PIAGGIO VEHICLES PVT LTD	3,380	15.62%	5,629	14.80%
MAHINDRA & MAHINDRA LIMITED	1,356	6.27%	1,854	4.87%
ATUL AUTO LTD	833	3.85%	1,342	3.53%
YC ELECTRIC VEHICLE	758	3.50%	1,456	3.83%
TVS MOTOR COMPANY LTD	493	2.28%	1,028	2.70%
MAHINDRA REVA ELECTRIC VEHICLES PVT LTD	452	2.09%	603	1.59%
Others including EV	6,623	30.61%	12,733	33.48%
Total	21,636	100.00%	38,034	100.00%

Source: FADA Research

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Commercial Vehicle (CV)				
Commercial Vehicle OEM	APR'21	Market Share (%), APR'21	MAR'21	Market Share (%), MAR'21
TATA MOTORS LTD	21,801	42.38%	28,821	42.78%
MAHINDRA & MAHINDRA LIMITED	9,773	19.00%	11,807	17.53%
ASHOK LEYLAND LTD	8,185	15.91%	10,486	15.56%
VE COMMERCIAL VEHICLES LTD	3,409	6.63%	4,201	6.24%
MARUTI SUZUKI INDIA LTD	2,420	4.70%	3,767	5.59%
DAIMLER INDIA COMMERCIAL VEHICLES PVT. LTD	1,247	2.42%	1,440	2.14%
FORCE MOTORS LIMITED, A FIRODIA ENTERPRISE	541	1.05%	402	0.60%
SML ISUZU LTD	485	0.94%	583	0.87%
Others	3,575	6.95%	5,865	8.71%
Total	51,436	100.00%	67,372	100.00%

Source: FADA Research

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Passenger Vehicle (PV)				
Passenger Vehicle OEM	APR'21	Market Share (%), APR'21	MAR'21	Market Share (%), MAR'21
MARUTI SUZUKI INDIA LTD	96,743	46.31%	1,29,412	46.26%
HYUNDAI MOTOR INDIA LTD	33,590	16.08%	45,719	16.34%
TATA MOTORS LTD	19,137	9.16%	24,541	8.77%
MAHINDRA & MAHINDRA LIMITED	11,788	5.64%	15,329	5.48%
KIA MOTORS INDIA PVT LTD	11,517	5.51%	15,256	5.45%
TOYOTA KIRLOSKAR MOTOR PVT LTD	8,690	4.16%	12,530	4.48%
RENAULT INDIA PVT LTD	7,124	3.41%	8,989	3.21%
HONDA CARS INDIA LTD	5,342	2.56%	8,288	2.96%
FORD INDIA PVT LTD	4,214	2.02%	4,708	1.68%
MG MOTOR INDIA PVT LTD	2,830	1.35%	4,248	1.52%
NISSAN MOTOR INDIA PVT LTD	2,503	1.20%	3,151	1.13%
SKODA AUTO VOLKSWAGEN INDIA PVT LTD	2,270	1.09%	3,012	1.08%
FIAT INDIA AUTOMOBILES PVT LTD	738	0.35%	998	0.36%
BMW INDIA PVT LTD	557	0.27%	826	0.30%
MERCEDES-BENZ INDIA PVT LTD	524	0.25%	780	0.28%
FORCE MOTORS LIMITED, A FIRODIA ENTERPRISE	167	0.08%	265	0.09%
JAGUAR LAND ROVER INDIA LIMITED	144	0.07%	214	0.08%
VOLVO AUTO INDIA PVT LTD	86	0.04%	96	0.03%
AUDI AG	75	0.04%	93	0.03%
VOLKSWAGEN AG/INDIA PVT. LTD.	41	0.02%	105	0.04%
PORSCHE AG GERMANY	23	0.01%	34	0.01%
SKODA AUTO INDIA/AS PVT LTD	16	0.01%	10	0.00%
MERCEDES -BENZ AG	12	0.01%	32	0.01%
AUTOMOBILI LAMBORGHINI S.P.A	5	0.00%	4	0.00%
FERRARI INDIA PRIVATE LIMITED	-	0.00%	2	0.00%
ROLLS ROYCE	-	0.00%	1	0.00%
Others	747	0.36%	1,102	0.39%
Total	2,08,883	100.00%	2,79,745	100.00%

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 Registration Data has been collated as on 08.05.21 in collaboration with Ministry of Road Transport & Highways, Government of India and has been gathered from 1,289 out of 1,493 RTOs.



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Tractor (TRAC)				
Tractor OEM	APR'21	Market Share (%), APR'21	MAR'21	Market Share (%), MAR'21
MAHINDRA & MAHINDRA LIMITED (TRACTOR)	8,067	21.07%	14,959	21.65%
MAHINDRA & MAHINDRA LIMITED (SWARAJ DIVISION)	6,222	16.25%	11,614	16.81%
INTERNATIONAL TRACTORS LIMITED	4,718	12.32%	8,681	12.57%
ESCORTS LIMITED (AGRI MACHINERY GROUP)	4,542	11.86%	8,416	12.18%
TAFE LIMITED	4,506	11.77%	7,068	10.23%
JOHN DEERE INDIA PVT LTD(TRACTOR DEVISION)	3,223	8.42%	6,121	8.86%
EICHER TRACTORS	2,231	5.83%	4,383	6.34%
CNH INDUSTRIAL (INDIA) PVT LTD	1,823	4.76%	2,637	3.82%
KUBOTA AGRICULTURAL MACHINERY INDIA PVT.LTD.	619	1.62%	1,269	1.84%
V.S.T. TILLERS TRACTORS LIMITED	249	0.65%	486	0.70%
FORCE MOTORS LIMITED, A FIRODIA ENTERPRISE	244	0.64%	381	0.55%
INDO FARM EQUIPMENT LIMITED	186	0.49%	310	0.45%
CAPTAIN TRACTORS PVT. LTD.	161	0.42%	96	0.14%
Others	1,494	3.90%	2,661	3.85%
Total	38,285	100.00%	69,082	100.00%

Source: FADA Research

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