

FOR IMMEDIATE RELEASE

FADA Releases July'20 Vehicle Registration Data

- **Vehicle Registration for July tanks by -36% as India continues to fight with Covid-19.**
- **On a YoY basis, 2-Wheeler degrows by -37.47%, 3-Wheeler by -74.33%, CV by -72.18%, and PV by -25.19%. Tractor registration continues its positive momentum showing a growth of 37.24%.**
- **Despite abundant liquidity, risk averse mood of Banks and NBFC's, affecting demand in CV, 3W and 2W categories.**
- **FADA once again appeals to our Government for industry specific demand boosters and Immediate roll out of Scrapage Policy and make Auto Industry the Beacon head for Growth Revival**
- **FADA Institute of Marketing and Research for the first time is releasing OEM wise market share for all the categories of vehicle and will give deeper analytics on Auto Retail Industry regularly in the future.**

10th August'20, New Delhi: The Federation of Automobile Dealers Associations (FADA) today released the Monthly Vehicle Registration Data for the Month of July'20.

July'20 Retail Sales

Commenting on how July'20 performed and new dataset included by FADA, FADA President, Mr Ashish Harsharaj Kale said, **"As India continues to open up, the month of July saw better registrations compared to June, though on a YoY basis Auto Sector recovery is yet to be seen anywhere near normal. Current market conditions are still not indicative of the actual demand situation on an all India level and retails continue to de-grow in huge double digit despite the low base of last year.**

Rural market though continues to show strong growth as monsoon continues its good spell. Tractor, Small Commercial Vehicles and Motorcycle sales positively impacted with the monsoon progress and spread.

Banks and NBFCs though flush with high liquidity are still having a cautious approach towards funding auto retail affecting the Demand revival especially in segments of CV, 3W and 2W. Vehicle funding percentage has fallen by 10-15% in many segments increasing the initial contribution beyond reach of many customers, despite having the intent to buy.

The Indian Auto Industry and its eco-system of Suppliers, OEM's and Dealers can have a wide positive impact on Consumer Sentiment by return to Pre-Covid Volumes.

FADA once again appeals to the Government to announce demand boosting policies as this will ensure speedier Auto Demand. Auto Industry eagerly awaits incentive based scrapage policy and this will be the fillip to Medium & Heavy Commercial Vehicles sales.

FADA Institute of Automobile Marketing & Research

Bringing further transparency in Auto Retails, FADA Institute of Automobile Marketing & Research for the first time is releasing Vehicle Registration based OEM market share (Annexure 1). This will not



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only shift market share calculation from wholesale to actual retails, which is the Global Practise, but will also bring further clarity in OEM wise inventory at dealers end. It will also help all the stakeholders viz., Suppliers, OEMs ,Banks/NBFC and Dealers get real time demand status thus helping them in better planning.

FADA Institute of Automobile Marketing & Research will now be regularly bringing in deeper analysis on various aspects of Auto Retail in India. In times to come, it will also bring OEM wise market share at State Level thus bringing in more transparency.”

Outlook for August

With a Caveat of no further lockdowns, especially in auto manufacturing hubs, the outlook for the month is positive in comparison to July.

August brings with itself the beginning of long festival season. With Onam and Ganesh Chaturthi in next few days, FADA hopes that Auto Industry will start its recovery journey in a linear manner.

Extreme Caution is required by OEM’s towards wholesale billing being in tune with retail sales to avoid Dealer Inventory build-up.

With Retail Sales still at 60-70% levels YoY despite the low base of last year, Dealers are battling on many fronts to navigate through this unprecedented crisis and disproportionate inventory. The excessive interest cost could further put many on the border of business survival.

The full year Outlook continues to remain negative with a projected de-growth in retail sales in the range of 15%-35% across various segments except Tractors which looks set to clock a positive annual growth.

Chart showing Vehicle Registration Data for July’20 with YoY comparison can be found below:

All India Vehicle Registration Data for July’20

CATEGORY	JULY'20	JULY'19	YoY %
2W	8,74,638	13,98,702	-37.47%
3W	15,132	58,940	-74.33%
CV	19,293	69,338	-72.18%
PV	1,57,373	2,10,377	-25.19%
TRAC	76,197	55,522	37.24%
Total	11,42,633	17,92,879	-36.27%

Source: FADA Research

Disclaimer:

- 1- The above numbers do not have figures from AP, AN, MP, LD & TS as all these States/UT’s are not yet on Vahan 4.
- 2- Vehicle Registration Data has been collated as on 07.08.20 and in collaboration with Ministry of Road Transport & Highways, Government of India and has been gathered from 1,235 out of 1,445 RTOs.

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

State-wise Vehicle Registration Analysis can be found in Annexure 2, Page No. 07.

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



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About F A D A India

Founded in 1964, Federation of Automobile Dealers Associations (F A D A), 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. F A D A India represents over 15,000 automobile dealers having 26,500 dealerships including 27 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.

F A D A 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-20 with YoY comparison

Two Wheeler (2W)				
OEM Name	JULY'20	Market Share (%) , July'20	JULY'19	Market Share (%) , July'19
HERO MOTOCORP LTD	3,55,595	40.66%	4,98,050	35.61%
HONDA MOTORCYCLE AND SCOOTER INDIA (P) LTD	2,01,432	23.03%	3,56,823	25.51%
TVS MOTOR COMPANY LTD	1,24,144	14.19%	2,10,846	15.07%
BAJAJ AUTO LTD	93,371	10.68%	1,68,554	12.05%
ROYAL-ENFIELD	34,313	3.92%	50,420	3.60%
INDIA YAMAHA MOTOR PVT LTD	32,819	3.75%	52,043	3.72%
SUZUKI MOTORCYCLE INDIA PVT LTD	28,737	3.29%	51,923	3.71%
PIAGGIO VEHICLES PVT LTD	2,078	0.24%	5,506	0.39%
CLASSIC LEGENDS PVT LTD	569	0.07%	991	0.07%
H-D MOTOR COMPANY INDIA PVT LTD	103	0.01%	199	0.01%
INDIA KAWASAKI MOTORS PVT LTD	43	0.00%	233	0.02%
TRIUMPH MOTORCYCLES (INDIA) PVT LTD	39	0.00%	88	0.01%
BMW INDIA PVT LTD	15	0.00%	176	0.01%
ADISHWAR AUTO RIDE INDIA PVT LTD	0	0.00%	60	0.00%
DUCATI INDIA PVT LTD	0	0.00%	27	0.00%
DUCATI MOTOR HOLDING S.P.A	0	0.00%	5	0.00%
Others including EV	1,380	0.16%	2,758	0.20%
Total	8,74,638	100.00%	13,98,702	100.00%

Three Wheeler (3W)				
OEM Name	JULY'20	Market Share (%) , July'20	JULY'19	Market Share (%) , July'19
BAJAJ AUTO LTD	5,627	37.19%	28,237	47.91%
PIAGGIO VEHICLES PVT LTD	3,075	20.32%	11,298	19.17%
TVS MOTOR COMPANY LTD	389	2.57%	1,024	1.74%
ATUL AUTO LTD	341	2.25%	3,130	5.31%
MAHINDRA & MAHINDRA LIMITED	303	2.00%	3,518	5.97%
Others including EV	5,397	35.67%	11,733	19.91%
Total	15,132	100.00%	58,940	100.00%

Commercial Vehicle (CV)				
OEM Name	JULY'20	Market Share (%) , July'20	JULY'19	Market Share (%) , July'19
MAHINDRA & MAHINDRA LIMITED	8,930	46.29%	17,158	24.75%
TATA MOTORS LTD	4,058	21.03%	27,811	40.11%
ASHOK LEYLAND LTD	1,619	8.39%	11,459	16.53%



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MARUTI SUZUKI INDIA LTD	1,374	7.12%	2,202	3.18%
VE COMMERCIAL VEHICLES LTD	676	3.50%	3,831	5.53%
DAIMLER INDIA COMMERCIAL VEHICLES PVT. LTD	232	1.20%	1,191	1.72%
FORCE MOTORS LIMITED	147	0.76%	1,306	1.88%
SML ISUZU LTD	94	0.49%	1,185	1.71%
Others	2,163	11.21%	3,195	4.61%
Total	19,293	100.00%	69,338	100.00%

Passenger Vehicle (PV)				
OEM Name	JULY'20	Market Share (%), July'20	JULY'19	Market Share (%), July'19
MARUTI SUZUKI INDIA LTD	79,315	50.40%	99,381	47.24%
HYUNDAI MOTOR INDIA LTD	29,413	18.69%	38,556	18.33%
TATA MOTORS LTD	12,753	8.10%	12,760	6.07%
MAHINDRA & MAHINDRA LIMITED	7,811	4.96%	17,828	8.47%
KIA MOTORS INDIA PVT LTD	7,007	4.45%	0	0.00%
RENAULT INDIA PVT LTD	4,997	3.18%	4,293	2.04%
TOYOTA KIRLOSKAR MOTOR PVT LTD	4,396	2.79%	9,991	4.75%
HONDA CARS INDIA LTD	3,303	2.10%	10,763	5.12%
FORD INDIA PVT LTD	3,213	2.04%	5,687	2.70%
SKODA AUTO VOLKSWAGEN INDIA PVT LTD	1,662	1.06%	1,027	0.49%
MG MOTOR INDIA PVT LTD	1,306	0.83%	711	0.34%
MERCEDES-BENZ INDIA PVT LTD	400	0.25%	786	0.37%
FIAT INDIA AUTOMOBILES PVT LTD	270	0.17%	877	0.42%
BMW INDIA PVT LTD	258	0.16%	685	0.33%
NISSAN MOTOR INDIA PVT LTD	244	0.16%	2,060	0.98%
VOLVO AUTO INDIA PVT LTD	88	0.06%	135	0.06%
VOLKSWAGEN AG/INDIA PVT. LTD.	79	0.05%	2,174	1.03%
JAGUAR LAND ROVER INDIA LIMITED	76	0.05%	229	0.11%
MERCEDES -BENZ AG	18	0.01%	0	0.00%
FORCE MOTORS LIMITED	16	0.01%	585	0.28%
PORSCHE AG GERMANY	7	0.00%	14	0.01%
AUTOMOBILI LAMBORGHINI S.P.A	4	0.00%	6	0.00%
BENTLEY MOTORS LIMITED	1	0.00%	0	0.00%
FERRARI INDIA PRIVATE LIMITED	1	0.00%	3	0.00%
ROLLS ROYCE	1	0.00%	2	0.00%
Others	734	0.47%	1,824	0.87%
Total	1,57,373	100.00%	2,10,377	100.00%



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Tractor (TRAC)				
OEM Name	JULY'20	Market Share (%) , July'20	JULY'19	Market Share (%) , July'19
MAHINDRA & MAHINDRA LIMITED (TRACTOR)	18,607	24.42%	13,399	24.13%
MAHINDRA & MAHINDRA LIMITED (SWARAJ DIVISION)	12,249	16.08%	8,290	14.93%
TAFE LIMITED	9,579	12.57%	6,500	11.71%
INTERNATIONAL TRACTORS LIMITED	8,989	11.80%	7,133	12.85%
ESCORTS LIMITED (AGRI MACHINERY GROUP)	8,781	11.52%	5,988	10.78%
JOHN DEERE INDIA PVT LTD(TRACTOR DEVISION)	5,052	6.63%	3,792	6.83%
EICHER TRACTORS	4,969	6.52%	4,038	7.27%
CNH INDUSTRIAL (INDIA) PVT LTD	2,635	3.46%	2,052	3.70%
KUBOTA AGRICULTURAL MACHINERY INDIA PVT.LTD.	1,211	1.59%	686	1.24%
V.S.T. TILLERS TRACTORS LIMITED	920	1.21%	702	1.26%
CAPTAIN TRACTORS PVT. LTD.	809	1.06%	384	0.69%
FORCE MOTORS LIMITED	423	0.56%	269	0.48%
INDO FARM EQUIPMENT LIMITED	148	0.19%	162	0.29%
Others	1,825	2.40%	2,127	3.83%
Total	76,197	100.00%	55,522	100.00%

Source: FADA Research

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Annexure 2

State wise Vehicle Registration Data for the Month of July-20 with YoY comparison

ARUNACHAL PRADESH			
CATEGORY	JULY'20	JULY'19	YoY %
2W	346	1,636	-78.85%
3W	2	121	-98.35%
CV	5	140	-96.43%
PV	165	708	-76.69%
TRAC	16	23	-30.43%
Total	534	2,628	-79.68%

ASSAM			
CATEGORY	JULY'20	JULY'19	YoY %
2W	16,690	28,429	-41.29%
3W	885	2,502	-64.63%
CV	695	1,955	-64.45%
PV	3,608	5,884	-38.68%
TRAC	1,009	689	46.44%
Total	22,887	39,459	-42.00%

BIHAR			
CATEGORY	JULY'20	JULY'19	YoY %
2W	49,116	88,199	-44.31%
3W	2,327	6,103	-61.87%
CV	815	2,339	-65.16%
PV	3,371	5,039	-33.10%
TRAC	5,260	3,287	60.02%
Total	60,889	1,04,967	-41.99%

CHHATTISGARH			
CATEGORY	JULY'20	JULY'19	YoY %
2W	26,522	44,738	-40.72%
3W	137	672	-79.61%
CV	465	1,608	-71.08%
PV	2,769	3,746	-26.08%
TRAC	3,545	3,622	-2.13%
Total	33,438	54,386	-38.52%



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CHANDIGARH			
CATEGORY	JULY'20	JULY'19	YoY %
2W	1,145	2,161	-47.02%
3W	21	39	-46.15%
CV	4	109	-96.33%
PV	1,033	1,397	-26.06%
TRAC	-	-	-
Total	2,203	3,706	-40.56%

DADRA & NAGAR HAVELI AND DAMAN & DIU			
CATEGORY	JULY'20	JULY'19	YoY %
2W	498	1,108	-55.05%
3W	2	9	-77.78%
CV	23	187	-87.70%
PV	144	306	-52.94%
TRAC	2	4	-50.00%
Total	669	1,614	-58.55%

DELHI			
CATEGORY	JULY'20	JULY'19	YoY %
2W	26,515	35,043	-24.34%
3W	726	2,303	-68.48%
CV	225	1,570	-85.67%
PV	9,817	12,076	-18.71%
TRAC	-	3	-100.00%
Total	37,283	50,995	-26.89%

GOA			
CATEGORY	JULY'20	JULY'19	YoY %
2W	1,443	2,666	-45.87%
3W	2	9	-77.78%
CV	78	136	-42.65%
PV	694	1,229	-43.53%
TRAC	3	-	-
Total	2,220	4,040	-45.05%



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GUJARAT			
CATEGORY	JULY'20	JULY'19	YoY %
2W	45,731	98,496	-53.57%
3W	419	7,145	-94.14%
CV	1,484	5,301	-72.01%
PV	14,331	19,983	-28.28%
TRAC	11,704	8,909	31.37%
Total	73,669	1,39,834	-47.32%

HIMACHAL PRADESH			
CATEGORY	JULY'20	JULY'19	YoY %
2W	7,936	6,246	27.06%
3W	13	21	-38.10%
CV	466	1,254	-62.84%
PV	5,319	4,201	26.61%
TRAC	178	81	119.75%
Total	13,912	11,803	17.87%

HARYANA			
CATEGORY	JULY'20	JULY'19	YoY %
2W	37,111	49,537	-25.08%
3W	356	2,004	-82.24%
CV	711	3,657	-80.56%
PV	12,162	13,987	-13.05%
TRAC	4,842	4,441	9.03%
Total	55,182	73,626	-25.05%

JHARKHAND			
CATEGORY	JULY'20	JULY'19	YoY %
2W	33,186	36,921	-10.12%
3W	586	1,646	-64.40%
CV	365	1,202	-69.63%
PV	4,086	4,332	-5.68%
TRAC	1,575	793	98.61%
Total	39,798	44,894	-11.35%



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JAMMU & KASHMIR			
CATEGORY	JULY'20	JULY'19	YoY %
2W	5,609	10,438	-46.26%
3W	28	463	-93.95%
CV	66	1,320	-95.00%
PV	3,177	6,832	-53.50%
TRAC	5	254	-98.03%
Total	8,885	19,307	-53.98%

KARNATAKA			
CATEGORY	JULY'20	JULY'19	YoY %
2W	54,059	97,897	-44.78%
3W	815	4,706	-82.68%
CV	1,527	5,628	-72.87%
PV	11,107	14,105	-21.25%
TRAC	4,209	3,220	30.71%
Total	71,717	1,25,556	-42.88%

KERALA			
CATEGORY	JULY'20	JULY'19	YoY %
2W	30,788	55,218	-44.24%
3W	815	2,614	-68.82%
CV	906	2,791	-67.54%
PV	8,785	17,901	-50.92%
TRAC	36	40	-10.00%
Total	41,330	78,564	-47.39%

LADAKH			
CATEGORY	JULY'20	JULY'19	YoY %
2W	-	58	-100.00%
3W	-	-	-
CV	-	49	-100.00%
PV	2	250	-99.20%
TRAC	-	3	-100.00%
Total	2	360	-99.44%



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MAHARASHTRA			
CATEGORY	JULY'20	JULY'19	YoY %
2W	70,690	1,20,839	-41.50%
3W	1,506	7,998	-81.17%
CV	2,317	9,212	-74.85%
PV	16,149	22,155	-27.11%
TRAC	8,988	4,073	120.67%
Total	99,650	1,64,277	-39.34%

MEGHALAYA			
CATEGORY	JULY'20	JULY'19	YoY %
2W	812	1,429	-43.18%
3W	12	81	-85.19%
CV	99	298	-66.78%
PV	639	863	-25.96%
TRAC	1	-	-
Total	1,563	2,671	-41.48%

MANIPUR			
CATEGORY	JULY'20	JULY'19	YoY %
2W	116	2,360	-95.08%
3W	1	134	-99.25%
CV	1	156	-99.36%
PV	53	670	-92.09%
TRAC	-	4	-100.00%
Total	171	3,324	-94.86%

MIZORAM			
CATEGORY	JULY'20	JULY'19	YoY %
2W	1,385	2,133	-35.07%
3W	78	5	1460.00%
CV	102	207	-50.72%
PV	385	466	-17.38%
TRAC	1	-	-
Total	1,951	2,811	-30.59%



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NAGALAND			
CATEGORY	JULY'20	JULY'19	YoY %
2W	-	541	-100.00%
3W	-	95	-100.00%
CV	6	1,343	-99.55%
PV	4	669	-99.40%
TRAC	-	-	-
Total	10	2,648	-99.62%

ODISHA			
CATEGORY	JULY'20	JULY'19	YoY %
2W	32,405	54,680	-40.74%
3W	511	1,867	-72.63%
CV	854	2,783	-69.31%
PV	2,998	4,178	-28.24%
TRAC	1,962	1,692	15.96%
Total	38,730	65,200	-40.60%

PUNJAB			
CATEGORY	JULY'20	JULY'19	YoY %
2W	26,869	39,933	-32.71%
3W	109	602	-81.89%
CV	385	1,795	-78.55%
PV	6,783	6,598	2.80%
TRAC	2,910	1,694	71.78%
Total	37,056	50,622	-26.80%

PUDUCHERRY			
CATEGORY	JULY'20	JULY'19	YoY %
2W	2,905	4,815	-39.67%
3W	4	10	-60.00%
CV	24	92	-73.91%
PV	272	693	-60.75%
TRAC	3	3	0.00%
Total	3,208	5,613	-42.85%



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RAJASTHAN			
CATEGORY	JULY'20	JULY'19	YoY %
2W	62,299	79,870	-22.00%
3W	523	2,021	-74.12%
CV	1,758	4,447	-60.47%
PV	10,903	10,607	2.79%
TRAC	11,406	8,122	40.43%
Total	86,889	1,05,067	-17.30%

SIKKIM			
CATEGORY	JULY'20	JULY'19	YoY %
2W	147	364	-59.62%
3W	-	-	-
CV	7	31	-77.42%
PV	161	543	-70.35%
TRAC	-	-	-
Total	315	938	-66.42%

TAMIL NADU			
CATEGORY	JULY'20	JULY'19	YoY %
2W	95,902	1,49,073	-35.67%
3W	521	3,929	-86.74%
CV	2,278	7,837	-70.93%
PV	9,001	16,945	-46.88%
TRAC	2,879	1,807	59.32%
Total	1,10,581	1,79,591	-38.43%

TRIPURA			
CATEGORY	JULY'20	JULY'19	YoY %
2W	2,895	3,658	-20.86%
3W	414	133	211.28%
CV	56	200	-72.00%
PV	315	473	-33.40%
TRAC	2	1	100.00%
Total	3,682	4,465	-17.54%



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FEDERATION OF AUTOMOBILE DEALERS ASSOCIATIONS

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UTTARAKHAND			
CATEGORY	JULY'20	JULY'19	YoY %
2W	11,672	16,184	-27.88%
3W	170	694	-75.50%
CV	265	639	-58.53%
PV	3,260	3,261	-0.03%
TRAC	296	228	29.82%
Total	15,663	21,006	-25.44%

UTTAR PRADESH			
CATEGORY	JULY'20	JULY'19	YoY %
2W	1,63,513	2,61,961	-37.58%
3W	3,084	9,039	-65.88%
CV	2,121	7,161	-70.38%
PV	19,185	22,635	-15.24%
TRAC	13,383	10,192	31.31%
Total	2,01,286	3,10,988	-35.28%

WEST BENGAL			
CATEGORY	JULY'20	JULY'19	YoY %
2W	66,333	1,02,071	-35.01%
3W	1,065	1,975	-46.08%
CV	1,185	3,891	-69.55%
PV	6,695	7,645	-12.43%
TRAC	1,982	2,337	-15.19%
Total	77,260	1,17,919	-34.48%