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

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FOR IMMEDIATE RELEASE

FADA Releases June'21 Vehicle Retail Data

- ***Total vehicle retail for the month of June'21 rise by 22.62% YoY on a low base. When compared to June'19 (a regular pre-covid month), retails are still down by -28.32%.***
- ***On YoY basis, all categories were in green with 2W up by 17%, 3W up by 22%, PV up by 43%, Tractor up by 14% and CV up by a massive 236% (on a very low base due to non-availability of BS-6 vehicles).***
- ***Positive momentum from June carries forward to July. With Southern India opening up, we can expect further pickup in demand.***
- ***While daily infection cases have been contained offering some respite from the debilitating second wave, however the new virus mutants and the impending 3rd wave continue to pose as risks on a longer term.***
- ***FADA thanks the Government of India to bring entire Auto Retail under MSME. This will help the industry at a time when gears are down.***

8th July'21, New Delhi: The Federation of Automobile Dealers Associations (FADA) today released Vehicle Retail Data for June'21.

June'21 Retails

Commenting on how June'21 performed, FADA President, Mr. Vinkesh Gulati said, **"The month of June witnessed re-opening for most of the states except the ones in South. Due to this, the industry witnessed a high pent up demand which was stuck in the system because of statewide lockdowns.**

While all the categories were in green, Passenger Vehicles maintains to see good demand as customers continued to show keenness in vehicles for observing social distancing and safety of their families. Two Wheeler category though in green has witnessed a softer recovery as rural market is taking time to get back from post covid stress. Commercial vehicle segment has seen a staggering growth over last year, though on a very low base as there were product shortages due to BS-6 transition.

Overall, the Industry is still not out of the woods. When compared to June'19, we are still in red by -28% with 3W and CVs taking the max hit as they are down by -70% and -45% respectively. Only Tractors continue to grow as it was up 27% compared to June'19.

FADA is thankful to the Government of India and previous MSME Minister, Shri Nitin Gadkari for bringing entire Auto Retail under the ambit of MSME. This will definitely help Auto Dealers in multiple ways, may it be lower cost of financing or lower utility rates to name a few.

Near Term Outlook

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Positive momentum from June carry forwards to July. With southern India opening up, we can expect further pickup in demand. On a longer term, Auto Industry is yet to see retail numbers comparable to FY 19.

Continued global semi-conductor shortage is impacting demand – supply mis-match thus restricting the growth of Passenger Vehicles. On one hand, while the new virus mutants and a prediction of 3rd wave in August are effecting sentiments, the revival of monsoons in July after a pause of 2 weeks and a better vaccination drive rate continues to build some hope.

We will therefore have to wait and watch how the overall economy shapes up over the next couple of months. We hence see demand to be a mixed bag and hope that recovery is back on track by the time Navratri and Diwali knocks our door.

- Inventory at the end of June'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 June'21

CATEGORY	JUN'21	JUN'20	YoY %	JUN'19	% Chg, JUN'19
2W	9,30,324	7,95,819	**16.90%**	13,38,005	**-30.47%**
3W	14,732	12,077	**21.98%**	48,815	**-69.82%**
PV	1,84,134	1,28,360	**43.45%**	2,05,213	**-10.27%**
TRAC	52,261	45,735	**14.27%**	40,937	**27.66%**
CV	35,700	10,619	**236.19%**	65,035	**-45.11%**
LCV	*21,650*	*8,428*	***156.88%***	*38,876*	***-44.31%***
MCV	*2,091*	*78*	***2580.77%***	*4,740*	***-55.89%***
HCV	*9,575*	*346*	***2667.34%***	*18,880*	***-49.28%***
Others	*2,384*	*1,767*	***34.92%***	*2,539*	***-6.10%***
Total	**12,17,151**	**9,92,610**	**22.62%**	**16,98,005**	**-28.32%**

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 06.07.21 in collaboration with Ministry of Road Transport & Highways, Government of India and has been gathered from 1,295 out of 1,498 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

JUN'21 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'21 with YoY comparison

Two-Wheeler (2W)				
Two-Wheeler OEM	**JUN'21**	**Market Share (%), JUN'21**	**JUN'20**	**Market Share (%), JUN'20**
HERO MOTOCORP LTD	4,15,366	44.65%	3,17,734	39.93%
HONDA MOTORCYCLE AND SCOOTER INDIA (P) LTD	1,96,668	21.14%	1,98,135	24.90%
TVS MOTOR COMPANY LTD	1,19,954	12.89%	1,09,112	13.71%
BAJAJ AUTO LTD	1,07,019	11.50%	73,614	9.25%
ROYAL-ENFIELD (UNIT OF EICHER LTD)	35,999	3.87%	36,311	4.56%
SUZUKI MOTORCYCLE INDIA PVT LTD	25,123	2.70%	27,610	3.47%
INDIA YAMAHA MOTOR PVT LTD	22,390	2.41%	30,105	3.78%
PIAGGIO VEHICLES PVT LTD	1,892	0.20%	1,655	0.21%
CLASSIC LEGENDS PVT LTD	1,563	0.17%	120	0.02%
HERO ELECTRIC VEHICLES PVT. LTD	1,194	0.13%	484	0.06%
OKINAWA AUTOTECH PVT LTD	959	0.10%	356	0.04%
Others including EV	2,197	0.24%	583	0.07%
Total	**9,30,324**	**100.00%**	**7,95,819**	**100.00%**

Source: FADA Research

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2- Vehicle Retail Data has been collated as on 06.07.21 in collaboration with Ministry of Road Transport & Highways, Government of India and has been gathered from 1,295 out of 1,498 RTOs.
3- Others include OEMs accounting less than 0.1% Market Share.

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Three-Wheeler (3W)				
Three-Wheeler OEM	**JUN'21**	**Market Share (%), JUN'21**	**JUN'20**	**Market Share (%), JUN'20**
BAJAJ AUTO LTD	4,925	33.43%	4996	41.37%
PIAGGIO VEHICLES PVT LTD	2,258	15.33%	2346	19.43%
MAHINDRA & MAHINDRA LIMITED	657	4.46%	293	2.43%
ATUL AUTO LTD	594	4.03%	93	0.77%
YC ELECTRIC VEHICLE	539	3.66%	473	3.92%
SAERA ELECTRIC AUTO PVT LTD	295	2.00%	282	2.34%
MAHINDRA REVA ELECTRIC VEHICLES PVT LTD	273	1.85%	203	1.68%
CHAMPION POLY PLAST	269	1.83%	155	1.28%
TVS MOTOR COMPANY LTD	226	1.53%	139	1.15%
J. S. AUTO (P) LTD	203	1.38%	68	0.56%
DILLI ELECTRIC AUTO PVT LTD	192	1.30%	75	0.62%
BEST WAY AGENCIES PVT LTD	170	1.15%	112	0.93%
UNIQUE INTERNATIONAL	155	1.05%	54	0.45%
Others including EV	3,976	26.99%	2,788	23.09%
Total	**14,732**	**100.00%**	**12,077**	**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	**JUN'21**	**Market Share (%), JUN'21**	**JUN'20**	**Market Share (%), JUN'20**
TATA MOTORS LTD	13,987	39.18%	893	8.41%
MAHINDRA & MAHINDRA LIMITED	9,177	25.71%	5,523	52.01%
ASHOK LEYLAND LTD	4,579	12.83%	1,153	10.86%
VE COMMERCIAL VEHICLES LTD	1,957	5.48%	194	1.83%
MARUTI SUZUKI INDIA LTD	1,764	4.94%	902	8.49%
FORCE MOTORS LIMITED, A FIRODIA ENTERPRISE	760	2.13%	11	0.10%
DAIMLER INDIA COMMERCIAL VEHICLES PVT. LTD	735	2.06%	72	0.68%
SML ISUZU LTD	294	0.82%	27	0.25%
Others	2,447	6.85%	1,844	17.37%
Total	**35,700**	**100.00%**	**10,619**	**100.00%**

Source: FADA Research

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Passenger Vehicle (PV)				
Passenger Vehicle OEM	**JUN'21**	**Market Share (%), JUN'21**	**JUN'20**	**Market Share (%), JUN'20**
MARUTI SUZUKI INDIA LTD	74,752	40.60%	67,180	52.34%
HYUNDAI MOTOR INDIA LTD	34,431	18.70%	24,324	18.95%
TATA MOTORS LTD	20,373	11.06%	8,839	6.89%
KIA MOTORS INDIA PVT LTD	14,875	8.08%	5,960	4.64%
MAHINDRA & MAHINDRA LIMITED	12,392	6.73%	4,877	3.80%
RENAULT INDIA PVT LTD	5,481	2.98%	3,927	3.06%
TOYOTA KIRLOSKAR MOTOR PVT LTD	5,279	2.87%	4,391	3.42%
HONDA CARS INDIA LTD	4,688	2.55%	2,849	2.22%
FORD INDIA PVT LTD	2,790	1.52%	2,872	2.24%
MG MOTOR INDIA PVT LTD	2,663	1.45%	1,157	0.90%
NISSAN MOTOR INDIA PVT LTD	2,195	1.19%	80	0.06%
SKODA AUTO VOLKSWAGEN GROUP	1,747	0.95%	962	0.75%
SKODA AUTO VOLKSWAGEN INDIA PVT LTD	*1,587*	0.86%	*909*	*0.71%*
VOLKSWAGEN AG/INDIA PVT. LTD.	*107*	0.06%	*0*	*0.00%*
AUDI AG	*45*	0.02%	*3*	*0.00%*
SKODA AUTO INDIA/AS PVT LTD	*8*	0.00%	*50*	*0.04%*
FIAT INDIA AUTOMOBILES PVT LTD	761	0.41%	203	0.16%
MERCEDES -BENZ GROUP	546	0.30%	305	0.24%
MERCEDES-BENZ INDIA PVT LTD	*526*	0.29%	*293*	*0.23%*
MERCEDES -BENZ AG	*20*	0.01%	*12*	*0.01%*
BMW INDIA PVT LTD	390	0.21%	155	0.12%
JAGUAR LAND ROVER INDIA LIMITED	123	0.07%	62	0.05%
FORCE MOTORS LIMITED, A FIRODIA ENTERPRISE	84	0.05%	1	0.00%
VOLVO AUTO INDIA PVT LTD	63	0.03%	52	0.04%
PCA AUTOMOBILES INDIA PVT LTD	56	0.03%	0	0.00%
PORSCHE AG GERMANY	9	0.00%	2	0.00%
BENTLEY MOTORS LTD	4	0.00%	1	0.00%
AUTOMOBILI LAMBORGHINI S.P.A	2	0.00%	2	0.00%
ROLLS ROYCE	1	0.00%	3	0.00%
Others	429	0.23%	156	0.12%
Total	**1,84,134**	**100.00%**	**1,28,360**	**100.00%**

Source: FADA Research

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Tractor (TRAC)				
Tractor OEM	**JUN'21**	**Market Share (%), JUN'21**	**JUN'20**	**Market Share (%), JUN'20**
MAHINDRA & MAHINDRA LIMITED (TRACTOR)	11,634	22.26%	11,191	24.47%
MAHINDRA & MAHINDRA LIMITED (SWARAJ DIVISION)	8,440	16.15%	7,164	15.66%
INTERNATIONAL TRACTORS LIMITED	6,687	12.80%	4,999	10.93%
ESCORTS LIMITED (AGRI MACHINERY GROUP)	6,473	12.39%	5,408	11.82%
TAFE LIMITED	6,468	12.38%	6,646	14.53%
JOHN DEERE INDIA PVT LTD(TRACTOR DEVISION)	3,838	7.34%	3,534	7.73%
EICHER TRACTORS	3,075	5.88%	2,631	5.75%
CNH INDUSTRIAL (INDIA) PVT LTD	2,243	4.29%	1,428	3.12%
KUBOTA AGRICULTURAL MACHINERY INDIA PVT.LTD.	796	1.52%	758	1.66%
V.S.T. TILLERS TRACTORS LIMITED	309	0.59%	381	0.83%
INDO FARM EQUIPMENT LIMITED	241	0.46%	88	0.19%
FORCE MOTORS LIMITED, A FIRODIA ENTERPRISE	189	0.36%	278	0.61%
CAPTAIN TRACTORS PVT. LTD.	188	0.36%	60	0.13%
Others	1,680	3.21%	1,169	2.56%
Total	**52,261**	**100.00%**	**45,735**	**100.00%**

Source: FADA Research

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