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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 U74140DL2004NPL130324

FOR IMMEDIATE RELEASE

FADA Releases August'21 Vehicle Retail Data

- ***Total vehicle retails for the month of August'21 rises by 14.48% on YoY basis. When compared to August'19 (a regular pre-covid month), retails are still down by -14.75%.***
- ***On YoY basis, all categories were in green with 2W up by 6.66%, 3W up by 79.70%, PV up by 38.71%, Tractor up by 5.50% and CV up by 97.94%.***
- ***Both Tractors as well as PVs continues to see robust demand as they grow by 35.98% and 31.67% when compared to August'19, a pre-covid month.***
- ***FADA first raised demand supply mismatch in Jan'21 due to shortage of semi-conductors in few brands. This has now become a full-blown crisis with no light in sight.***
- ***FADA warns of a lacklustre festive season specially for PV Dealers as inventory level continues to dip due to non-availability of the fast-moving variants.***

7th September'21, New Delhi: The Federation of Automobile Dealers Associations (FADA) today released Vehicle Retail Data for August'21.

August'21 Retails

Commenting on how August'21 performed, FADA President, Mr. Vinkesh Gulati said, **"Auto Dealers are facing the most challenging phase of their business career as Covid-19 after-effect continues to play spoil-sport. While until last year, when demand was a challenge, supply is becoming a bigger problem currently due to shortage of semi-conductors, even though there is high demand for passenger vehicles.**

Every dealer by now starts planning for a bigger offtake in anticipation of a bumper festive but due to supply issues, inventory levels are at lowest levels during this Financial Year.

The 2W market is highly price sensitive. With multiple price hikes, increased fuel cost coupled with Educational Institutions remaining closed, the impact could be felt on the overall segment. Customers continued to fight financial battle due to Covid related health issues and hence remained away from dealerships resulting in low enquiry and lower sales. This has its impact on the entry level segment which continues to face the biggest brunt.

CV segment continues to witness some recovery coming back majorly due to low base of last year. While SCV's had already shown good recovery due to intra city goods movement, M&HCVs are picking up pace only in specific geographies where the Government is rolling out infrastructure projects. Acquisition cost post BS-6 implementation along with financers keeping away from the segment and high fuel cost continues to restrict recovery in CV demand."

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Near Term Outlook

With OEMs drastically cutting down productions due to unavailability of semi-conductors & ABS chips, shortage of containers and high metal prices, customers for the first time may not get a vehicle of their choice and lucrative schemes during this festive season. Ultra-frequent price increase is also keeping entry level buyers at bay.

Customers especially at the bottom of the pyramid are shifting their priority from saving instead of spending. This will hence keep demand for 2-wheelers a concern. Though, with Educational Institutions slowly opening up, a ray of hope can be seen for an improved demand in 2-Wheeler category in coming months.

FADA thus sees that the near term outlook will continue to remain a mixed bag with PVs witnessing demand-supply mis-match and 2W facing a demand crunch.

- Inventory at the end of July'21
    - Average inventory for Passenger Vehicles ranges from 25-30 days
    - Average inventory for Two – Wheelers ranges from 20-25 days

- Liquidity
    - 40.6% Dealers rated it as neutral
    - 37.8% Dealers rated it as good
    - 21.7% Dealers rated it as bad

- Upcoming Festive Season
    - 44.9% Dealers rated it as Good
    - 40.4% Dealers rated it as Neutral
    - 14.6% Dealers rated it as Bad

Chart showing Vehicle Retail Data

All India Vehicle Retail Data for August'21

CATEGORY	AUG'21	AUG'20	YoY %	AUG'19	% Chg, AUG'19
2W	9,76,051	9,15,126	6.66%	12,61,432	-22.62%
3W	30,410	16,923	79.70%	55,292	-45.00%
PV	2,53,363	1,82,651	38.71%	1,92,417	31.67%
TRAC	71,737	67,999	5.50%	52,757	35.98%
CV	53,150	26,851	97.94%	62,319	-14.71%
LCV	*34,829*	*21,520*	*61.84%*	*38,029*	*-8.41%*
MCV	*2,947*	*741*	*297.71%*	*3,963*	*-25.64%*
HCV	*12,463*	*2,365*	*426.98%*	*18,013*	*-30.81%*
Others	*2,911*	*2,225*	*30.83%*	*2,314*	*25.80%*
Total	**13,84,711**	**12,09,550**	**14.48%**	**16,24,217**	**-14.75%**

Source: FADA Research

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2- Vehicle Retail Data has been collated as on 05.09.21 in collaboration with Ministry of Road Transport & Highways, Government of India and has been gathered from 1,313 out of 1,527 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

Aug’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 August'21 with YoY comparison

Two-Wheeler (2W)				
Two-Wheeler OEM	**AUG'21**	**Market Share (%), AUG'21**	**AUG'20**	**Market Share (%), AUG'20**
HERO MOTOCORP LTD	3,13,074	32.08%	3,32,559	36.34%
HONDA MOTORCYCLE AND SCOOTER INDIA (P) LTD	2,48,108	25.42%	2,29,541	25.08%
TVS MOTOR COMPANY LTD	1,48,739	15.24%	1,41,947	15.51%
BAJAJ AUTO LTD	1,23,697	12.67%	1,01,489	11.09%
SUZUKI MOTORCYCLE INDIA PVT LTD	44,969	4.61%	31,328	3.42%
INDIA YAMAHA MOTOR PVT LTD	40,292	4.13%	36,245	3.96%
ROYAL-ENFIELD (UNIT OF EICHER LTD)	36,733	3.76%	35,951	3.93%
HERO ELECTRIC VEHICLES PVT. LTD	5,174	0.53%	523	0.06%
PIAGGIO VEHICLES PVT LTD	3,526	0.36%	2,507	0.27%
OKINAWA AUTOTECH PVT LTD	2,854	0.29%	413	0.05%
CLASSIC LEGENDS PVT LTD	2,377	0.24%	1,398	0.15%
ATHER ENERGY PVT LTD	1,611	0.17%	243	0.03%
PUR ENERGY PVT LTD	1,093	0.11%	79	0.01%
Others	3,804	0.39%	903	0.10%
Total	**9,76,051**	**100.00%**	**9,15,126**	**100.00%**

Source: FADA Research

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3- Others include OEMs accounting less than 0.1% Market Share.

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Three-Wheeler (3W)				
Three-Wheeler OEM	**AUG'21**	**Market Share (%), AUG'21**	**AUG'20**	**Market Share (%), AUG'20**
BAJAJ AUTO LTD	11,006	36.19%	6,444	38.08%
PIAGGIO VEHICLES PVT LTD	3,841	12.63%	3,701	21.87%
YC ELECTRIC VEHICLE	1,187	3.90%	572	3.38%
ATUL AUTO LTD	1,133	3.73%	627	3.71%
MAHINDRA & MAHINDRA LIMITED	1,111	3.65%	290	1.71%
MAHINDRA REVA ELECTRIC VEHICLES PVT LTD	616	2.03%	225	1.33%
SAERA ELECTRIC AUTO PVT LTD	606	1.99%	371	2.19%
TVS MOTOR COMPANY LTD	603	1.98%	411	2.43%
CHAMPION POLY PLAST	567	1.86%	146	0.86%
DILLI ELECTRIC AUTO PVT LTD	443	1.46%	150	0.89%
THUKRAL ELECTRIC BIKES PVT LTD	402	1.32%	148	0.87%
BEST WAY AGENCIES PVT LTD	396	1.30%	114	0.67%
UNIQUE INTERNATIONAL	382	1.26%	121	0.72%
J. S. AUTO (P) LTD	344	1.13%	121	0.72%
VANI ELECTRIC VEHICLES PVT LTD	335	1.10%	237	1.40%
MINI METRO EV L.L.P	311	1.02%	117	0.69%
Others	7,127	23.44%	3,128	18.48%
Total	**30,410**	**100.00%**	**16,923**	**100.00%**

Source: FADA Research

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Commercial Vehicle (CV)				
Commercial Vehicle OEM	**AUG'21**	**Market Share (%), AUG'21**	**AUG'20**	**Market Share (%), AUG'20**
TATA MOTORS LTD	20,805	39.14%	7,164	26.68%
MAHINDRA & MAHINDRA LIMITED	13,385	25.18%	10,867	40.47%
ASHOK LEYLAND LTD	6,958	13.09%	2,861	10.66%
MARUTI SUZUKI INDIA LTD	3,721	7.00%	1,848	6.88%
VE COMMERCIAL VEHICLES LTD	3,151	5.93%	1,070	3.98%
DAIMLER INDIA COMMERCIAL VEHICLES PVT. LTD	865	1.63%	357	1.33%
FORCE MOTORS LIMITED, A FIRODIA ENTERPRISE	753	1.42%	278	1.04%
SML ISUZU LTD	462	0.87%	163	0.61%
Others	3,050	5.74%	2,243	8.35%
Total	**53,150**	**100.00%**	**26,851**	**100.00%**

Source: FADA Research

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Passenger Vehicle (PV)				
Passenger Vehicle OEM	**AUG'21**	**Market Share (%), AUG'21**	**AUG'20**	**Market Share (%), AUG'20**
MARUTI SUZUKI INDIA LTD	1,08,944	43.00%	90,540	49.57%
HYUNDAI MOTOR INDIA LTD	43,988	17.36%	35,552	19.46%
TATA MOTORS LTD	25,577	10.10%	14,450	7.91%
MAHINDRA & MAHINDRA LIMITED	16,457	6.50%	9,200	5.04%
KIA MOTORS INDIA PVT LTD	13,900	5.49%	7,795	4.27%
TOYOTA KIRLOSKAR MOTOR PVT LTD	10,722	4.23%	4,811	2.63%
RENAULT INDIA PVT LTD	7,779	3.07%	5,914	3.24%
HONDA CARS INDIA LTD	6,357	2.51%	4,853	2.66%
SKODA AUTO VOLKSWAGEN GROUP	4,485	1.77%	2,138	1.17%
SKODA AUTO VOLKSWAGEN INDIA PVT LTD	*4,216*	*1.66%*	*1,784*	*0.98%*
VOLKSWAGEN AG/INDIA PVT. LTD.	*167*	*0.07%*	*194*	*0.11%*
AUDI AG	*99*	*0.04%*	*9*	*0.00%*
SKODA AUTO INDIA/AS PVT LTD	*3*	*0.00%*	*151*	*0.08%*
FORD INDIA PVT LTD	3,604	1.42%	3,463	1.90%
NISSAN MOTOR INDIA PVT LTD	3,569	1.41%	391	0.21%
MG MOTOR INDIA PVT LTD	3,326	1.31%	1,695	0.93%
MERCEDES -BENZ GROUP	1,070	0.42%	497	0.27%
MERCEDES-BENZ INDIA PVT LTD	*999*	*0.39%*	*471*	*0.26%*
MERCEDES -BENZ AG	*61*	*0.02%*	*18*	*0.01%*
DAIMLER AG	*10*	*0.00%*	*8*	*0.00%*
FIAT INDIA AUTOMOBILES PVT LTD	1,042	0.41%	334	0.18%
BMW INDIA PVT LTD	692	0.27%	411	0.23%
FORCE MOTORS LIMITED, A FIRODIA ENTERPRISE	319	0.13%	53	0.03%
JAGUAR LAND ROVER INDIA LIMITED	237	0.09%	116	0.06%
VOLVO AUTO INDIA PVT LTD	130	0.05%	93	0.05%
PORSCHE AG GERMANY	43	0.02%	7	0.00%
PCA AUTOMOBILES INDIA PVT LTD	40	0.02%	0	0.00%
AUTOMOBILI LAMBORGHINI S.P.A	8	0.00%	1	0.00%
BENTLEY MOTORS LTD	5	0.00%	1	0.00%
ROLLS ROYCE	3	0.00%	2	0.00%
Others	1,066	0.42%	334	0.18%
Total	**2,53,363**	**100.00%**	**1,82,651**	**100.00%**

Source: FADA Research

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Tractor (TRAC)				
Tractor OEM	**AUG'21**	**Market Share (%), AUG'21**	**AUG'20**	**Market Share (%), AUG'20**
MAHINDRA & MAHINDRA LIMITED (TRACTOR)	15,917	22.19%	16,477	24.23%
MAHINDRA & MAHINDRA LIMITED (SWARAJ DIVISION)	11,547	16.10%	10,638	15.64%
TAFE LIMITED	8,607	12.00%	7,736	11.38%
INTERNATIONAL TRACTORS LIMITED	8,249	11.50%	8,636	12.70%
ESCORTS LIMITED (AGRI MACHINERY GROUP)	7,526	10.49%	6,978	10.26%
JOHN DEERE INDIA PVT LTD(TRACTOR DEVISION)	5,449	7.60%	4,505	6.63%
EICHER TRACTORS	4,271	5.95%	4,477	6.58%
CNH INDUSTRIAL (INDIA) PVT LTD	2,795	3.90%	2,504	3.68%
KUBOTA AGRICULTURAL MACHINERY INDIA PVT.LTD.	1,664	2.32%	1,309	1.93%
CAPTAIN TRACTORS PVT. LTD.	1,636	2.28%	802	1.18%
V.S.T. TILLERS TRACTORS LIMITED	1,202	1.68%	1,002	1.47%
FORCE MOTORS LIMITED, A FIRODIA ENTERPRISE	408	0.57%	339	0.50%
INDO FARM EQUIPMENT LIMITED	285	0.40%	168	0.25%
Others	2,181	3.04%	2,428	3.57%
Total	**71,737**	**100.00%**	**67,999**	**100.00%**

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