

FOR IMMEDIATE RELEASE

FADA Releases Aug'25 Vehicle Retail Data

Auto-Retail August 2025: Festive Enquiries Strong, GST 2.0 Defers Purchases to September

Retail Performance

Overall Retail: +2.84% YoY | +0.02% MoM

- **2W:** +2.18% YoY | +1.34% MoM
- **3W:** -2.26% YoY | -7.47% MoM
- **PV:** +0.93% YoY | -1.63% MoM | Inventory ~56 days
- **Trac:** +30.14% YoY | -3.95% MoM
- **CE:** -26.45% YoY | -5.56% MoM
- **CV:** +8.55% YoY | -1.11% MoM

Segment Highlights

- **2W:** Festive enquiries high (Onam, Ganesh Chaturthi); rains & GST deferments slowed conversions.
- **PV:** Healthy bookings but GST 2.0 wait-and-watch and heavy rains supply kept growth muted.
- **CV:** Solid YoY growth on ecommerce & replacement demand; GST sentiment slowed last week.
- **Trac:** Exceptional growth, driven by strong monsoon, rural liquidity, and crop outlook.

Policy Spotlight – GST 2.0

“GST 2.0 marks a historic, people-first reset — courage, consensus, and clarity in taxation.” — *FADA President, Mr. C. S. Vigneshwar*

- Implementation from **22nd September**
- **Simplified slabs:** 5%, 18%, 40%
- **Benefits:** Lower household costs, stronger demand, industry competitiveness

Near-Term Outlook (September 2025)

- **Macros:** GDP 6.3–6.8% growth, CPI 1.55% (multi-year low), monsoon +8% above normal.
- **Auto Retail:** Two-phase month
 - Early September: muted (Shraddh + GST deferments)
 - Late September: strong rebound (Navratri, GST clarity, festive demand)
- **OEM Schemes:** Offering price benefits now, so customers can book early and ensure deliveries on auspicious days.

FADA View: *Decisively Optimistic — September to mark the start of a strong growth cycle for Indian Auto Retail.*

8th September'25, New Delhi, BHARAT: The Federation of Automobile Dealers Associations (FADA) today released Vehicle Retail Data for Aug'25.

GST 2.0 reforms

Reflecting on GST 2.0 reforms FADA President Mr. C S Vigneshwar said: **“Under the visionary leadership of Hon’ble Prime Minister Shri Narendra Modi ji, GST 2.0 marks a historic, people-first reset — moving India towards a citizen-friendly ‘Simple Tax’ with just two slabs, along with a special rate for a select few. It embodies courage, consensus, and clarity in indirect taxation.”**

The landmark announcement from the Red Fort has only strengthened buyer optimism, with many families preferring to align their purchases with the forthcoming reduced GST rates. This is a reflection of trust in policy, which has not dampened demand but merely deferred a part of it to September, when we expect festive deliveries and conversions to gather full momentum.

The resilience of India’s auto retail industry, combined with the once-in-a-generation reform of GST 2.0, positions the sector for a robust festive season. Dealers remain confident that September will herald the beginning of an accelerated growth cycle, powered by both policy tailwinds and festive fervour.”

August'25 Retails

Reflecting on August 2025 Auto Retail results, FADA President Mr. C S Vigneshwar said: **“August traditionally ushers in festive cheer, with Onam and Ganesh Chaturthi heralding the season of joy. Customers continued to show strong enthusiasm with high enquiries and robust bookings, ensuring that vehicles are aligned for auspicious festive deliveries. The only issue was conversion, which saw slowdown due to benefits of GST 2.0 kicking in September.”**

The month concluded with a modest 2.84% YoY growth, led by healthy performances in 2-wheelers (2.18%), passenger vehicles (0.93%), and commercial vehicles (8.55%), while tractors registered an exceptional 30.14% YoY growth. Only 3-wheelers (-2.26%) and construction equipment (-26.45%) moderated slightly.

The 2W retails in August registered a modest growth of 1.34% MoM and 2.18% YoY. Enquiries remained strong, fuelled by the onset of festivals such as Onam and Ganesh Chaturthi, with many customers keen on auspicious-day deliveries. However, excessive rains and localised floods in North India disrupted rural mobility, while erratic supply of popular scooter models constrained conversions. The landmark GST 2.0 announcement also led to buyers deferring purchases to September in anticipation of lower rates. Despite these factors, overall sentiment is steady, and dealers remain confident that the festive season ahead will unlock robust growth momentum.

CV retails in August grew by 8.55% YoY but softened marginally by -1.11% MoM. Dealer feedback suggests that while product acceptance and order clearances remained healthy — supported by new contracts from ecommerce and replacement demand — market sentiment in the last week was impacted by speculation around GST reductions, leading to deferment of purchases. With rains subsiding and festive demand ahead, dealers remain confident of stronger traction in September.

PV retails in August recorded a modest growth of 0.93% YoY while softening by -1.63% MoM. The month began on a positive note with healthy enquiries and festive bookings, but momentum slowed in the latter half as the announcement of GST 2.0 reforms led many customers to postpone purchases, anticipating a price reduction. Heavy rains and floods in some regions further disrupted walk-ins, while uneven supply of high-demand models and aggressive OEM targets added to the pressure. At the close of August, average inventory levels stood elevated at around 56 days. Despite this temporary pause, demand fundamentals remain intact, supported by festive



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sentiment and strong customer interest in both ICE and EV models. Dealers expect September to deliver a sharper rebound, as GST clarity and auspicious festive days converge to unlock deferred demand.”

Near-Term Outlook

India enters September 2025 on a foundation of strong growth, backed by low inflation and macroeconomic stability. GDP growth is tracking 6.3–6.8% for the year, while CPI inflation touched a multi-year low of 1.55% in July, reflecting easing food and fuel prices.

The rollout of GST 2.0 from 22nd September is set to be a game-changer — lowering household expenses, lifting consumption, and improving industry competitiveness. Economists expect it could reduce inflation by up to 1.1 percentage points. A vigorous monsoon has further strengthened rural liquidity, with agriculture poised for above-trend output despite some localized flood damage.

For auto retail, September will be a two-phase month: a muted first half due to Shraddh and GST wait-and-watch, followed by a sharp surge as policy clarity, festive sentiment, and OEM schemes that mirror upcoming GST reductions converge. These schemes allow customers to book vehicles now while enjoying GST-aligned benefits, ensuring timely deliveries on their preferred auspicious dates such as Navratri and Durga Puja. Dealers across categories expect this strategy to unlock deferred demand and smoothen festive season supply.

With GST 2.0 as a landmark reform, proactive OEM schemes, and the onset of India's biggest festivals, FADA remains decisively optimistic that September will mark the beginning of a strong growth cycle for auto retail.

Key Findings from our Online Members Survey

- **Liquidity**
 - Neutral 41.30%
 - Good 32.97%
 - Bad 25.72%
- **Sentiment**
 - Neutral 42.39%
 - Good 38.41%
 - Bad 19.20%
- **Expectation from September'25**
 - Growth 62.75%
 - Flat 22.83%
 - De-growth 09.42%
- **Expectation in next 3 months**
 - Growth 77.90%
 - Flat 18.48%
 - De-growth 03.62%



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Chart showing Vehicle Retail Data for Aug'25

All India Vehicle Retail Data for YTD FY'26 (Apr'25 to Aug'25)

CATEGORY	YTD FY'26	YTD FY'25	Growth %
2W	75,42,020	73,64,622	2.41%
3W	5,19,358	4,88,734	6.27%
CV	3,87,890	3,78,705	2.43%
CE	28,325	29,280	-3.26%
PV	16,40,760	15,98,524	2.64%
TRAC	3,84,253	3,43,146	11.98%
Total	1,05,02,606	1,02,03,011	2.94%

All India Vehicle Retail Data for Aug'25

CATEGORY	Aug'25	July'25	Aug'24	MoM%	YoY%
2W	13,73,675	13,55,504	13,44,380	1.34%	2.18%
3W	1,03,105	1,11,426	1,05,493	-7.47%	-2.26%
E-RICKSHAW(P)	36,969	39,798	44,346	-7.11%	-16.64%
E-RICKSHAW WITH CART (G)	6,213	6,813	4,396	-8.81%	41.33%
THREE-WHEELER (GOODS)	9,697	9,862	8,651	-1.67%	12.09%
THREE-WHEELER (PASSENGER)	50,100	54,861	48,012	-8.68%	4.35%
THREE-WHEELER (PERSONAL)	126	92	88	36.96%	43.18%
PV	3,23,256	3,28,613	3,20,291	-1.63%	0.93%
TRAC	85,215	88,722	65,477	-3.95%	30.14%
CE	3,704	3,509	5,036	5.56%	-26.45%
CV	75,592	76,439	69,635	-1.11%	8.55%
LCV	46,156	45,808	42,672	0.76%	8.16%
MCV	6,970	7,414	5,742	-5.99%	21.39%
HCV	22,412	23,154	21,159	-3.20%	5.92%
Others	54	63	62	-14.29%	-12.90%
Total	19,64,547	19,64,213	19,10,312	0.02%	2.84%

Source: FADA Research

Chart showing Fuel Wise Vehicle Retail Market Share for Aug'25

Two-Wheeler	Aug'25	July'25	Aug'24
PETROL/ETHANOL	92.15%	92.12%	93.07%
EV	7.60%	7.60%	6.63%
CNG/LPG	0.25%	0.28%	0.31%
Total	100%	100%	100%

Commercial Vehicle	Aug'25	July'25	Aug'24
Diesel	81.12%	81.46%	82.27%
CNG/LPG	12.52%	12.26%	11.19%
PETROL/ETHANOL	4.26%	4.59%	5.54%
EV	2.05%	1.63%	0.96%
HYBRID	0.04%	0.06%	0.04%
Total	100%	100%	100%

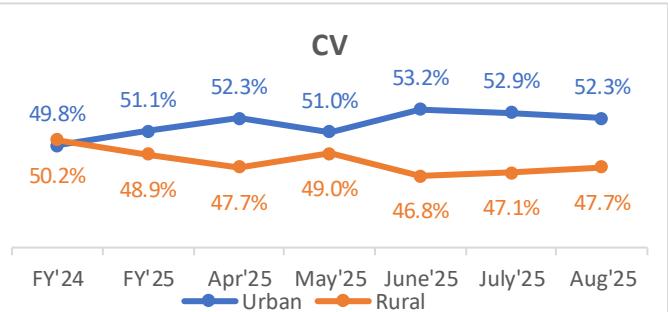
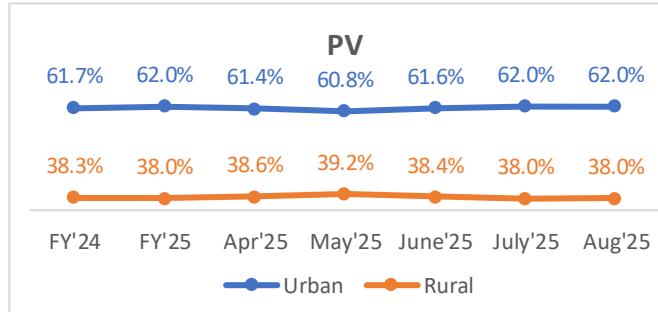
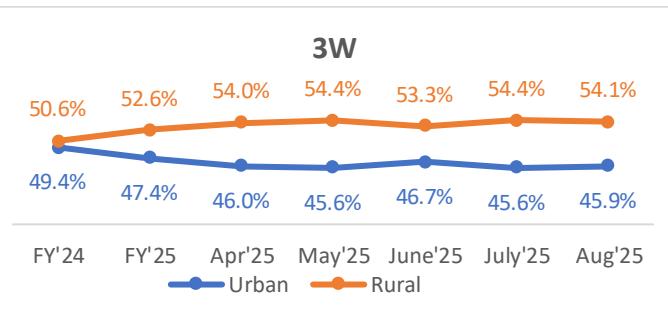
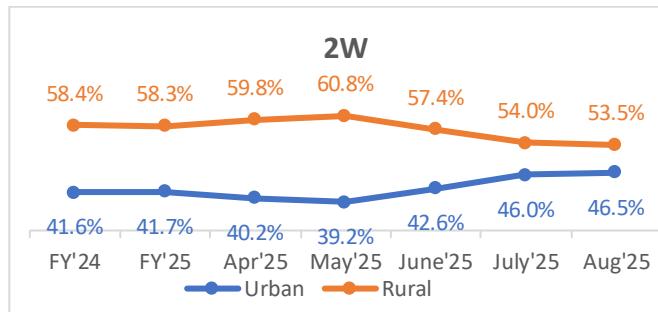
Three-Wheeler	Aug'25	July'25	Aug'24
EV	61.57%	62.06%	57.59%
CNG/LPG	26.99%	26.78%	31.50%
DIESEL	11.15%	10.78%	10.06%
PETROL/ETHANOL	0.29%	0.38%	0.85%
Total	100%	100%	100%

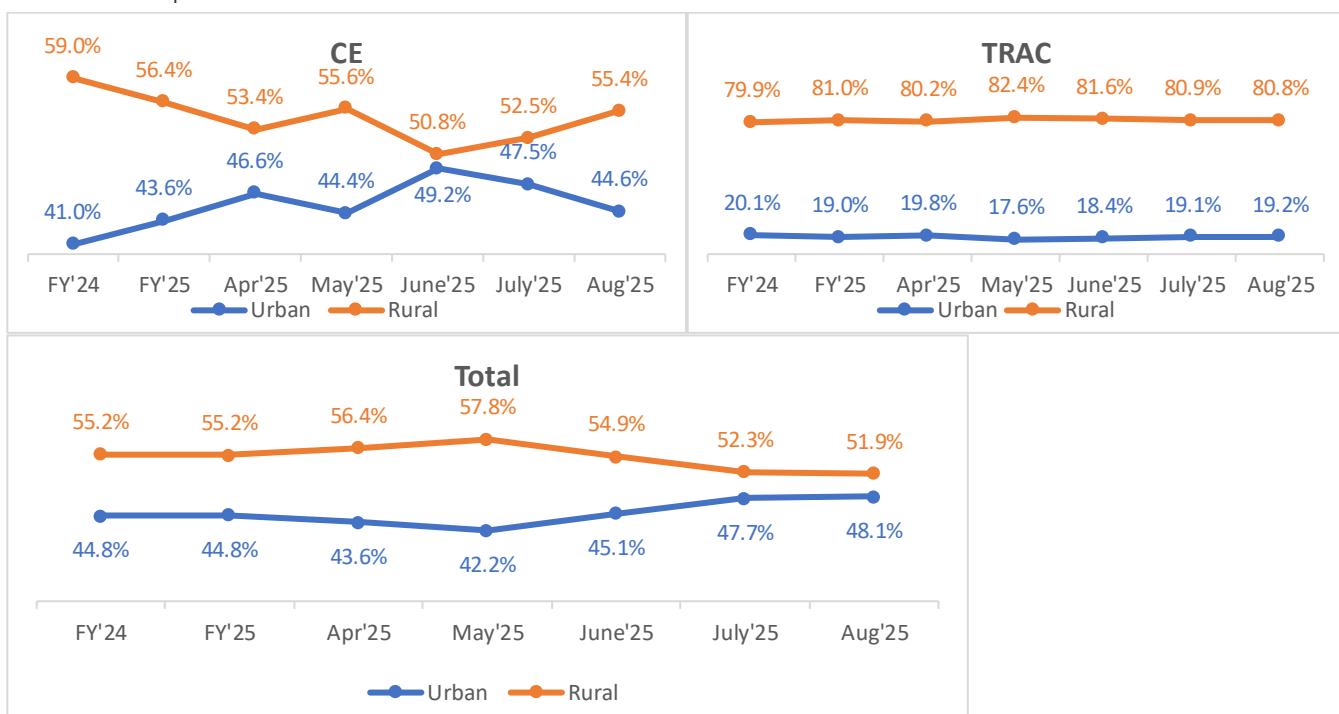
Construction Equipment	Aug'25	July'25	Aug'24
Diesel	99%	98.86%	99.92%
CNG/LPG	0.0%	0.00%	0.02%
PETROL/ETHANOL	0.1%	0.00%	0.02%
EV	0.5%	1.11%	0.02%
Total	100%	100%	100%

Passenger Vehicle	Aug'25	July'25	Aug'24
PETROL/ETHANOL	46.89%	48.11%	51.04%
Diesel	18.13%	17.75%	18.95%
CNG/LPG	21.47%	21.33%	18.72%
HYBRID	8.13%	8.08%	9.17%
EV	5.38%	4.73%	2.12%
Total	100%	100%	100%

Tractor	Aug'25	July'25	Aug'24
Diesel	99.99%	99.99%	99.98%
EV	0.01%	0.00%	0.00%
Total	100%	100%	100%

Source: FADA Research

All India Vehicle Retail Strength Index for Aug'25 on basis of Urban & Rural RTOs.




Source: FADA Research

All India Vehicle Retail Strength YoY and MoM comparison for Aug'25.

Category	MoM%	YoY%	Category	MoM%	YoY%
2W			CV		
Urban	2.46%	8.16%	Urban	-2.07%	11.61%
Rural	0.39%	-2.51%	Rural	-0.03%	5.38%
Total	1.34%	2.18%	Total	-1.11%	8.55%
3W			CE		
Urban	-6.88%	0.43%	Urban	-0.90%	-22.08%
Rural	-7.96%	-4.44%	Rural	11.40%	-29.63%
Total	-7.47%	-2.26%	Total	5.56%	-26.45%
PV			TRAC		
Urban	-1.69%	0.60%	Urban	-3.78%	39.39%
Rural	-1.53%	1.46%	Rural	-3.99%	28.13%
Total	-1.63%	0.93%	Total	-3.95%	30.14%
Total					
Urban	0.74%	6.53%			
Rural	-0.64%	-0.35%			
Total	0.02%	2.84%			

Source: FADA Research

Disclaimer:

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- 2- Vehicle Retail Data has been collated as on 03.09.25 in collaboration with Ministry of Road Transport & Highways, Government of India and has been gathered from 1,391 out of 1,451 RTOs.
- 3- 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)
 - d. Others – Construction Equipment Vehicles and others
- 4- 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

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

Aug'25 category-wise OEM market share can be found in Annexure 1, Page No. 08

Media Kit

FADA Logo	Mr. C S Vigneshwar, President – FADA
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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 Aug'25 (YoY comparison)

Two-Wheeler OEM	Aug'25	Market Share (%) Aug'25	Aug'24	Market Share (%) Aug'24
HONDA MOTORCYCLE AND SCOOTER INDIA (P) LTD	3,54,531	25.81%	3,53,917	26.33%
HERO MOTOCORP LTD	3,41,865	24.89%	3,59,268	26.72%
TVS MOTOR COMPANY LTD	2,71,522	19.77%	2,37,418	17.66%
BAJAJ AUTO LTD	1,29,138	9.40%	1,49,552	11.12%
SUZUKI MOTORCYCLE INDIA PVT LTD	90,800	6.61%	79,857	5.94%
ROYAL-ENFIELD (UNIT OF EICHER LTD)	71,630	5.21%	56,318	4.19%
INDIA YAMAHA MOTOR PVT LTD	53,504	3.89%	52,214	3.88%
OLA ELECTRIC TECHNOLOGIES PVT LTD	18,972	1.38%	27,623	2.05%
ATHER ENERGY LTD	17,871	1.30%	11,046	0.82%
GREAVES ELECTRIC MOBILITY PVT LTD	4,498	0.33%	2,824	0.21%
PIAGGIO VEHICLES PVT LTD	2,634	0.19%	2,780	0.21%
CLASSIC LEGENDS PVT LTD	2,406	0.18%	2,122	0.16%
PUR ENERGY PVT LTD	1,779	0.13%	291	0.02%
BGAUSS AUTO PRIVATE LIMITED	1,720	0.13%	1,111	0.08%
RIVER MOBILITY PVT LTD	1,657	0.12%	280	0.02%
KINETIC GREEN ENERGY & POWER SOLUTIONS LTD	1,513	0.11%	388	0.03%
Others Including EV	7,635	0.56%	7,371	0.55%
Total	13,73,675	100%	13,44,380	100%

Source: FADA Research

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2. Vehicle Retail Data has been collated as on 03.09.25 in collaboration with Ministry of Road Transport & Highways, Government of India and has been gathered from 1,391 out of 1,451 RTOs.
3. Others include OEMs accounting less than 0.1% Market Share.



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Three-Wheeler OEM	Aug'25	Market Share (%) Aug'25	Aug'24	Market Share (%) Aug'24
BAJAJ AUTO LTD	35,159	34.10%	37,763	35.80%
MAHINDRA & MAHINDRA LIMITED	9,360	9.08%	5,742	5.44%
MAHINDRA LAST MILE MOBILITY LTD	9,343	9.06%	5,671	5.38%
MAHINDRA & MAHINDRA LIMITED	17	0.02%	71	0.07%
PIAGGIO VEHICLES PVT LTD	6,725	6.52%	7,385	7.00%
TVS MOTOR COMPANY LTD	4,384	4.25%	2,246	2.13%
YC ELECTRIC VEHICLE	3,424	3.32%	3,793	3.60%
SAERA ELECTRIC AUTO PVT LTD	2,172	2.11%	2,807	2.66%
ATUL AUTO LTD	2,107	2.04%	2,102	1.99%
DILLI ELECTRIC AUTO PVT LTD	1,816	1.76%	2,207	2.09%
MINI METRO EV L.L.P	1,151	1.12%	1,338	1.27%
ENERGY ELECTRIC VEHICLES	1,080	1.05%	1,307	1.24%
Others including EV	35,727	34.65%	38,803	36.78%
Total	1,03,105	100%	1,05,493	100%

Source: FADA Research

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Commercial Vehicle OEM	Aug'25	Market Share (%) Aug'25	Aug'24	Market Share (%) Aug'24
TATA MOTORS LTD	24,271	32.11%	24,928	35.80%
MAHINDRA & MAHINDRA LIMITED	21,431	28.35%	18,460	26.51%
MAHINDRA & MAHINDRA LIMITED	19,830	26.23%	16,899	24.27%
MAHINDRA LAST MILE MOBILITY LTD	1,601	2.12%	1,561	2.24%
ASHOK LEYLAND LTD	14,305	18.92%	12,071	17.33%
ASHOK LEYLAND LTD	14,032	18.56%	12,038	17.29%
SWITCH MOBILITY AUTOMOTIVE LTD	273	0.36%	33	0.05%
VE COMMERCIAL VEHICLES LTD	6,602	8.73%	6,296	9.04%
VE COMMERCIAL VEHICLES LTD	6,555	8.67%	6,227	8.94%
VE COMMERCIAL VEHICLES LTD (VOLVO BUSES DIVISION)	47	0.06%	69	0.10%
MARUTI SUZUKI INDIA LTD	3,790	5.01%	3,452	4.96%
FORCE MOTORS LIMITED	1,765	2.33%	1,424	2.04%
DAIMLER INDIA COMMERCIAL VEHICLES PVT. LTD	1,458	1.93%	1,494	2.15%
SML ISUZU LTD	1,177	1.56%	1,018	1.46%
Others	793	1.05%	492	0.71%
Total	75,592	100.00%	69,635	100.00%

Source: FADA Research

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Construction Equipment OEM	Aug'25	Market Share (%) Aug'25	Aug'24	Market Share (%) Aug'24
JCB INDIA LIMITED	2,013	54.35%	2,403	47.72%
ACTION CONSTRUCTION EQUIPMENT LTD.	382	10.31%	693	13.76%
ESCORTS KUBOTA LIMITED (CONSTRUCTION EQUIPMENT)	236	6.37%	348	6.91%
AJAX ENGINEERING LTD	208	5.62%	287	5.70%
ALL TERRAIN CRANE	107	2.89%	77	1.53%
CATERPILLAR INDIA PRIVATE LIMITED	98	2.65%	127	2.52%
TATA MOTORS LTD	94	2.54%	122	2.42%
BULL MACHINES PVT LTD	84	2.27%	91	1.81%
M/S SCHWING STETTER (INDIA) PRIVATE LIMITED	74	2.00%	85	1.69%
CASE NEW HOLLAND CONSTRUCTION EQUIPMENT(I) PVT LTD	50	1.35%	96	1.91%
Others	358	9.67%	707	14.04%
Total	3,704	100.00%	5,036	100.00%

Source: FADA Research

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PV OEM	Aug'25	Market Share (%) Aug'25	Aug'24	Market Share (%) Aug'24
MARUTI SUZUKI INDIA LTD	1,27,905	39.57%	1,27,119	39.69%
MAHINDRA & MAHINDRA LIMITED	43,632	13.50%	40,569	12.67%
HYUNDAI MOTOR INDIA LTD	42,226	13.06%	43,438	13.56%
TATA MOTORS LTD	38,286	11.84%	39,864	12.45%
TOYOTA KIRLOSKAR MOTOR PVT LTD	24,954	7.72%	23,582	7.36%
KIA INDIA PRIVATE LIMITED	18,212	5.63%	19,304	6.03%
SKODA AUTO VOLKSWAGEN GROUP	8,111	2.51%	6,280	1.96%
SKODA AUTO VOLKSWAGEN INDIA PVT LTD	8,038	2.49%	6,256	1.95%
VOLKSWAGEN AG/INDIA PVT. LTD.	52	0.02%	-	0.00%
AUDI AG	21	0.01%	23	0.01%
SKODA AUTO INDIA/AS PVT LTD	-	0.00%	1	0.00%
JSW MG MOTOR INDIA PVT LTD	5,717	1.77%	4,117	1.29%
HONDA CARS INDIA LTD	4,041	1.25%	4,964	1.55%
RENAULT INDIA PVT LTD	2,593	0.80%	3,029	0.95%
NISSAN MOTOR INDIA PVT LTD	1,440	0.45%	2,011	0.63%
MERCEDES -BENZ GROUP	1,305	0.40%	1,327	0.41%
MERCEDES-BENZ INDIA PVT LTD	1,172	0.36%	1,235	0.39%
MERCEDES -BENZ AG	87	0.03%	88	0.03%
DAIMLER AG	46	0.01%	4	0.00%
BMW INDIA PVT LTD	1,273	0.39%	1,018	0.32%
FORCE MOTORS LIMITED	680	0.21%	747	0.23%
BYD INDIA PRIVATE LIMITED	450	0.14%	227	0.07%
JAGUAR LAND ROVER INDIA LIMITED	442	0.14%	517	0.16%
PCA AUTOMOBILES INDIA PVT LTD	409	0.13%	411	0.13%
Others	1,580	0.49%	1,767	0.55%
Total	3,23,256	100%	3,20,291	100%

Source: FADA Research

Disclaimer:

1. The above numbers do not have figures from TS.
2. Vehicle Retail Data has been collated as on 03.09.25 in collaboration with Ministry of Road Transport & Highways, Government of India and has been gathered from 1,391 out of 1,451 RTOs.



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Tractor OEM	Aug'25	Market Share (%) Aug'25	Aug'24	Market Share (%) Aug'24
MAHINDRA & MAHINDRA LIMITED (TRACTOR)	20,156	23.65%	16,187	24.72%
MAHINDRA & MAHINDRA LIMITED (SWARAJ DIVISION)	15,418	18.09%	12,225	18.67%
TAFE LIMITED	11,028	12.94%	7,117	10.87%
INTERNATIONAL TRACTORS LIMITED	10,410	12.22%	8,501	12.98%
ESCORTS KUBOTA LIMITED (AGRI MACHINERY GROUP)	8,662	10.16%	5,866	8.96%
JOHN DEERE INDIA PVT LTD (TRACTOR DEVISION)	5,987	7.03%	5,295	8.09%
EICHER TRACTORS	5,958	6.99%	4,185	6.39%
CNH INDUSTRIAL (INDIA) PVT LTD	3,900	4.58%	2,554	3.90%
Others	3,696	4.34%	3,547	5.42%
Total	85,215	100%	65,477	100%

Source: FADA Research

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2. Vehicle Retail Data has been collated as on 03.09.25 in collaboration with Ministry of Road Transport & Highways, Government of India and has been gathered from 1,391 out of 1,451 RTOs.
3. Others include OEMs accounting less than 1% Market Share.