

FOR IMMEDIATE RELEASE

FADA Releases June'25 Vehicle Retail Data

Overall Q1 FY26 Auto-Retail Report:

- Retail volumes +4.85 % YoY
- Category-wise retails: 2W +5.02 % YoY | 3W +11.79 % YoY | Trac +6.29 % YoY | PV +2.59 % YoY | CE +10.59 % YoY | CV +1.00 % YoY

June '25 Auto-Retail Report:

- Retail volumes +4.84 % YoY (MoM -9.44%)
- Category-wise retails:
 - 2W +4.73 % YoY, -12.48 % MoM,
 - 3W +6.68 % YoY, -3.66 % MoM
 - PV +2.45 % YoY, -1.49 % MoM (inventory ~ 55 days)
 - Trac +8.68 % YoY, 7.25% MoM
 - CE +54.95 % YoY, 44.98% MoM
 - CV +6.60 % YoY, -2.97 % MoM

Segment Highlights:

- **2W:** Early-cycle softness offset by festival & marriage-season demand; financing constraints and variant shortages moderated MoM retails.
- **PV:** Heavy monsoon and tight liquidity weighed on conversions despite incentive schemes; inventory remains elevated at ~ 55 days.
- **CV:** Robust YoY growth underpinned by early-month deliveries; muted infrastructure demand and new taxation norms tempered volume.

Near-Term Outlook (Jul '25):

- **Monsoon:** >106 % of LPA overall; rural demand boost vs. logistics risk in heavy-rain zones
- **Kharif Sowing:** +11.3 % YoY to 262.15 lakh ha—supports hinterland 2W uptake
- **Govt Capex:** Strong Jun–Aug spend on roads, rail, metro & green energy—buoys CV & CE
- **Supply-Chain:** Rare-earth shortages, geopolitical tensions & US-tariff spill-overs demand vigilance
- **Dealer Sentiment:** Tilted towards slowdown (flat 42.8 % + de-growth 26.1 % > growth 31.1 %)
- **Booking Pipelines:** Tepid enquiries: 2W 21 % | PV 38 % | CV 32 % of dealers
- **Headwinds:** Heavy rains, price hikes, variant shortages, high-base effects, tight financing & elevated ownership costs

Cautiously Optimistic View for Near Term.

7th July'25, New Delhi, INDIA: The Federation of Automobile Dealers Associations (FADA) today released Vehicle Retail Data for June'25.

Q1 FY26 Retails

Reflecting on Q1 FY26 Auto Retail results, FADA President Mr. C S Vigneshwar said: **“In Q1 FY26, retail sales tracked exactly to our forecasts—overall volumes rose 4.85% YoY, with PV up 2.59% and 2W at 5.02%, alongside 3W +11.79%, CV +1%, CE +10.59% and Trac +6.29%. While 2W showed some early-cycle softness, we remain confident of a robust ramp-up in the coming months as seasonal demand and targeted OEM initiatives take effect.”**

June'25 Retails

Reflecting on June 2025 Auto Retail results, FADA President Mr. C S Vigneshwar said: **“The month of June recorded a healthy 4.84% YoY growth overall. Segment-wise, every category closed in the green: 2W at 4.73%, 3W 6.68%, PV 2.45%, Trac 8.68%, CE 54.95% and CV 6.6%.**

2W retails dipped 12.48% MoM but still notched a 4.73% gain on a YoY basis. While festival and marriage-season demand provided a boost, financing constraints and intermittent variant shortages moderated sales. Early monsoon rains and rising EV penetration also shaped buying patterns. Several dealers cited compulsory billing and forced stock lifts—often via auto-debit wholesales—leading to mandated high days of inventory aligned with festival-season targets. Overall, June demonstrated a resilient two-wheeler performance amid mixed market signals.

PV retails slipped 1.49% MoM yet delivered a 2.45% YoY uplift. Heavy rains and tight market liquidity weighed on footfall and conversion, even as elevated incentive schemes and fresh bookings lent selective support. Some dealers indicated that certain PV OEMs have introduced compulsory billing procedures—such as automatic wholesale debits—to meet volume targets; inventory consequently stands at around 55 days. June thus painted a picture of modest but steadfast PV performance amid varied market cues.

CV retails declined 2.97% MoM while achieving a robust 6.6% YoY expansion. Early-month deliveries buoyed volumes before monsoon-induced slowdowns and constrained liquidity dampened enquiries and conversions. Members pointed to the impact of new CV taxation and mandatory air-conditioned cabins, which have elevated ownership costs, alongside muted infrastructure demand. Overall, June reflected a resilient CV segment adeptly navigating cost pressures and a softening economy.”

Near-Term Outlook

In the near term, above-normal monsoon rains—forecast at over 106% of the LPA in July, with regional variances—should bolster rural demand even as heavy-to-very-heavy precipitation zones introduce logistical complexities. Early Kharif sowing, up 11.3% YoY to 262.15 lakh hectares, underlines stronger farm incomes and augurs well for two-wheeler uptake in the hinterlands. Simultaneously, robust government capital expenditure through June–August—targeting roads, railways, metros and green-energy projects—will underpin CV and CE segments. However, evolving geopolitical tensions and potential spill-over from US tariff measures warrant vigilant supply-chain management and could temper consumer sentiment. Also, challenges in securing rare-earth materials have stalled component production, further constraining supply and retail volumes.



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As we enter July 2025, dealer sentiment appears tilted towards slowdown—flat and de-growth expectations (42.8% and 26.1%) exceed growth forecasts (31.1%). Similarly, booking-pipeline traction remains uneven—only 21% of 2W, 38% of PV and 32% of CV dealers report healthy enquiry flows. In the 2W arena, early monsoon showers and renewed rural activity have spurred interest, yet heavy rainfall, variant shortages and price increases effective July are moderating conversions. PV faces high-base effects, limited new-model launches and tight financing, offset in part by festival planning and fresh incentive schemes. CV continues to grapple with muted infrastructure demand, higher ownership costs from new taxation and mandatory AC-cabin norms, even as extended order pipelines provide some relief. Overall, July is likely to witness mixed fortunes—driven by agrarian tailwinds and school reopening's, yet tempered by seasonal headwinds, elevated price points and liquidity constraints.

Against this mixed backdrop, FADA adopts a stance of cautious optimism—leveraging rural demand drivers and government capex while remaining agile to navigate monsoon-related disruptions, supply constraints and liquidity pressures.

Key Findings from our Online Members Survey

- **Liquidity**
 - Neutral 48.86%
 - Bad 31.82%
 - Good 19.32%
- **Sentiment**
 - Neutral 47.73%
 - Bad 30.30%
 - Good 21.97%
- **Expectation from July'25**
 - Flat 42.80%
 - Growth 31.06%
 - De-growth 26.14%

Chart showing Vehicle Retail Data for June'25

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

CATEGORY	YTD FY'25	YTD FY'24	Growth %
2W	47,99,948	45,70,709	5.02%
3W	3,04,869	2,72,725	11.79%
CV	2,35,130	2,32,792	1.00%
CE	20,988	18,978	10.59%
PV	9,71,477	9,46,941	2.59%
TRAC	2,10,174	1,97,732	6.29%
Total	65,42,586	62,39,877	4.85%

All India Vehicle Retail Data for June'25

CATEGORY	June'25	May'25	June'24	MoM%	YoY%
2W	14,46,387	16,52,637	13,81,040	-12.48%	4.73%
3W	1,00,625	1,04,448	94,326	-3.66%	6.68%
E-RICKSHAW(P)	35,367	40,635	37,965	-12.96%	-6.84%
E-RICKSHAW WITH CART (G)	6,846	7,972	4,610	-14.12%	48.50%
THREE-WHEELER (GOODS)	9,468	10,272	8,970	-7.83%	5.55%
THREE-WHEELER (PASSENGER)	48,848	45,429	42,686	7.53%	14.44%
THREE-WHEELER (PERSONAL)	96	140	95	-31.43%	1.05%
PV	2,97,722	3,02,214	2,90,593	-1.49%	2.45%
TRAC	77,214	71,992	71,047	7.25%	8.68%
CE	8,558	5,903	5,523	44.98%	54.95%
CV	73,367	75,615	68,825	-2.97%	6.60%
LCV	44,469	44,419	40,872	0.11%	8.80%
MCV	7,393	6,772	6,417	9.17%	15.21%
HCV	21,447	24,382	21,473	-12.04%	-0.12%
Others	58	42	63	38.10%	-7.94%
Total	20,03,873	22,12,809	19,11,354	-9.44%	4.84%

Source: FADA Research

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

Two-Wheeler	June'25	May'25	June'24
PETROL/ETHANOL	92.50%	93.71%	94.21%
EV	7.28%	6.07%	5.79%
CNG/LPG	0.22%	0.22%	0.00%
Total	100%	100%	100%

Three-Wheeler	June'25	May'25	June'24
EV	60.18%	63.21%	55.47%
CNG/LPG	28.24%	25.57%	32.64%
DIESEL	11.16%	10.77%	11.01%
PETROL/ETHANOL	0.42%	0.45%	0.88%
Total	100%	100%	100%

Commercial Vehicle	June'25	May'25	June'24
Diesel	82.21%	83.05%	82.96%
CNG/LPG	11.83%	11.55%	10.67%
PETROL/ETHANOL	4.34%	3.99%	5.58%
EV	1.56%	1.35%	0.75%
HYBRID	0.05%	0.05%	0.04%
Total	100%	100%	100%

Construction Equipment	June'25	May'25	June'24
Diesel	100%	99.78%	99.93%
CNG/LPG	0.0%	0.00%	0.07%
PETROL/ETHANOL	0.0%	0.00%	0.00%
EV	0.1%	0.22%	0.00%
Total	100%	100%	100%



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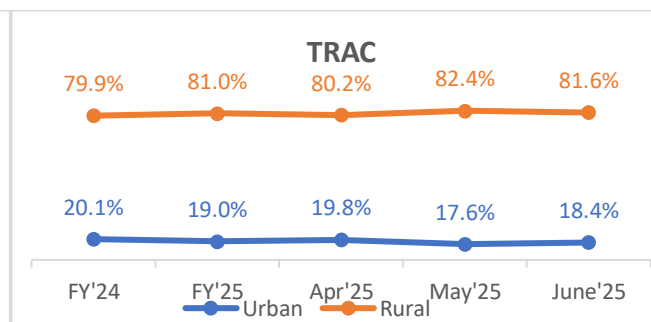
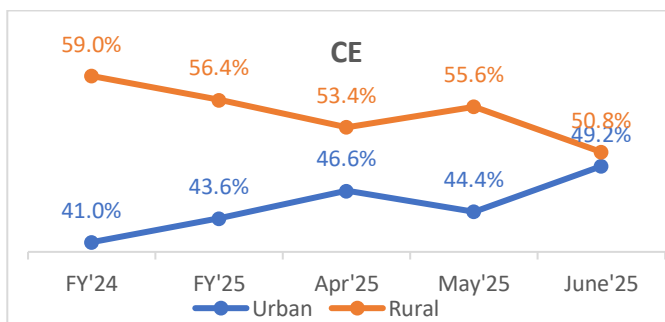
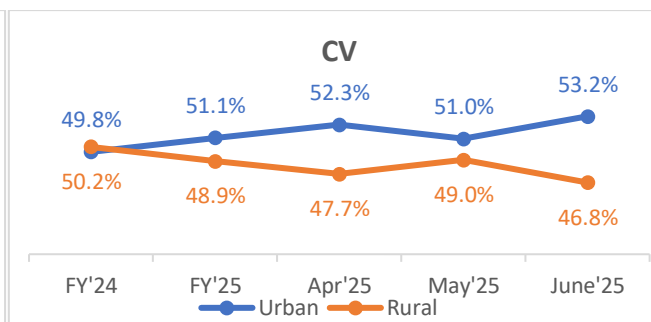
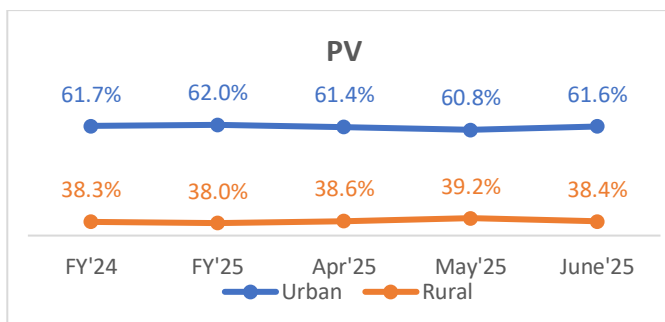
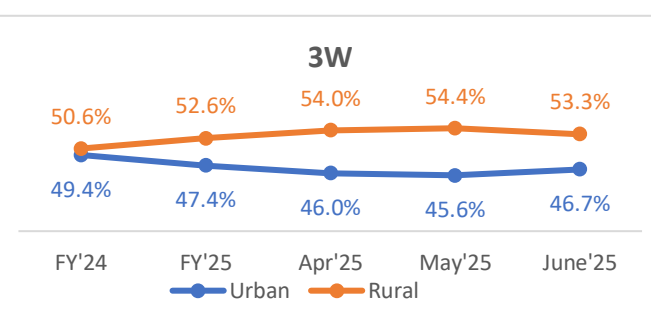
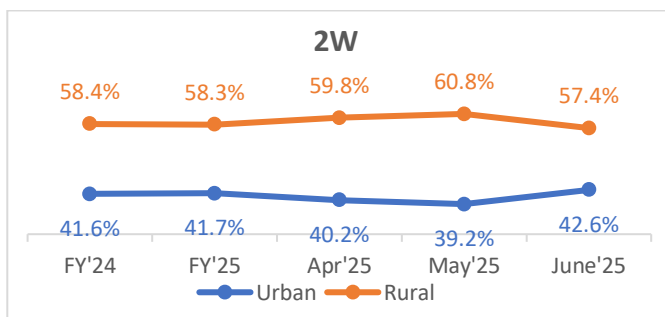
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Passenger Vehicle	June'25	May'25	June'24
PETROL/ETHANOL	48.15%	48.32%	52.23%
Diesel	18.48%	19.14%	18.37%
CNG/LPG	20.82%	20.17%	18.22%
HYBRID	8.13%	8.29%	8.66%
EV	4.43%	4.07%	2.52%
Total	100%	100%	100%

Source: FADA Research

Tractor	June'25	May'25	June'24
Diesel	99.99%	99.99%	99.99%
PETROL/ETHANOL	0.01%	0.00%	0.01%
CNG/LPG	0.0%	0.0%	0.0%
EV	0.00%	0.00%	0.00%
Total	100%	100%	100%

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





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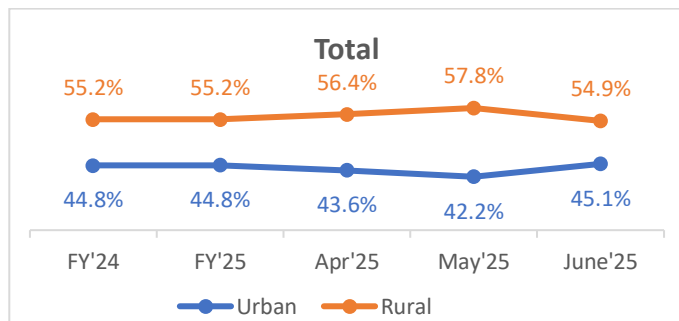
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Source: FADA Research

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

Category	MoM%	YoY%	Category	MoM%	YoY%
2W			CV		
Urban	-4.92%	7.72%	Urban	1.10%	12.26%
Rural	-17.36%	2.62%	Rural	-7.22%	0.83%
Total	-12.48%	4.73%	Total	-2.97%	6.60%
3W			CE		
Urban	-1.33%	5.21%	Urban	60.96%	81.01%
Rural	-5.61%	8.00%	Rural	32.24%	35.96%
Total	-3.66%	6.68%	Total	44.98%	54.95%
PV			TRAC		
Urban	-0.16%	0.90%	Urban	12.07%	15.64%
Rural	-3.53%	5.05%	Rural	6.22%	7.22%
Total	-1.49%	2.45%	Total	7.25%	8.68%
Total					
Urban	-3.14%	6.63%			
Rural	-14.04%	3.42%			
Total	-9.44%	4.84%			

Source: FADA Research

Disclaimer:

- The above numbers do not have figures from TS.
- Vehicle Retail Data has been collated as on 04.07.25 in collaboration with Ministry of Road Transport & Highways, Government of India and has been gathered from 1,386 out of 1,445 RTOs.
- Commercial Vehicle is subdivided in the following manner
 - LCV – Light Commercial Vehicle (incl. Passenger & Goods Vehicle)
 - MCV – Medium Commercial Vehicle (incl. Passenger & Goods Vehicle)
 - HCV – Heavy Commercial Vehicle (incl. Passenger & Goods Vehicle)
 - Others – Construction Equipment Vehicles and others
- 3-Wheeler is sub-divided in the following manner
 - E-Rickshaw – Passenger
 - E-Rickshaw – Goods
 - 3-Wheeler – Goods
 - 3-Wheeler – Passenger
 - 3-Wheeler – Personal

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

June'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.

Annexure 1

OEM wise Market Share Data for June'25 (YoY comparison)

Two-Wheeler OEM	June'25	Market Share (%) June'25	June'24	Market Share (%) June'24
HERO MOTOCORP LTD	3,93,832	27.23%	3,97,620	28.79%
HONDA MOTORCYCLE AND SCOOTER INDIA (P) LTD	3,55,295	24.56%	3,52,502	25.52%
TVS MOTOR COMPANY LTD	2,82,309	19.52%	2,36,947	17.16%
BAJAJ AUTO GROUP	1,56,360	10.81%	1,53,893	11.14%
BAJAJ AUTO LTD	1,56,360	10.81%	1,53,893	11.14%
CHETAK TECHNOLOGY LIMITED	-	0.00%	-	0.00%
SUZUKI MOTORCYCLE INDIA PVT LTD	85,309	5.90%	73,481	5.32%
ROYAL-ENFIELD (UNIT OF EICHER LTD)	70,640	4.88%	56,463	4.09%
INDIA YAMAHA MOTOR PVT LTD	48,690	3.37%	50,286	3.64%
OLA ELECTRIC TECHNOLOGIES PVT LTD	20,190	1.40%	36,859	2.67%
ATHER ENERGY LTD	14,526	1.00%	6,216	0.45%
GREAVES ELECTRIC MOBILITY PVT LTD	4,199	0.29%	2,716	0.20%
PIAGGIO VEHICLES PVT LTD	2,270	0.16%	2,736	0.20%
BGAUSS AUTO PRIVATE LIMITED	1,952	0.13%	1,062	0.08%
CLASSIC LEGENDS PVT LTD	1,892	0.13%	2,097	0.15%
Others Including EV	8,923	0.62%	8,162	0.59%
Total	14,46,387	100%	13,81,040	100%

Source: FADA Research

Disclaimer:

1. The above numbers do not have figures from TS.
2. Vehicle Retail Data has been collated as on 04.07.25 in collaboration with Ministry of Road Transport & Highways, Government of India and has been gathered from 1,386 out of 1,445 RTOs.
3. Others include OEMs accounting less than 0.1% Market Share.

Three-Wheeler OEM	June'25	Market Share (%) June'25	June'24	Market Share (%) June'24
BAJAJ AUTO LTD	36,140	35.92%	34,235	36.29%
MAHINDRA & MAHINDRA LIMITED	7,936	7.89%	5,450	5.78%
MAHINDRA LAST MILE MOBILITY LTD	7,912	7.86%	5,354	5.68%
MAHINDRA & MAHINDRA LIMITED	24	0.02%	96	0.10%
PIAGGIO VEHICLES PVT LTD	6,413	6.37%	6,853	7.27%
TVS MOTOR COMPANY LTD	3,678	3.66%	1,747	1.85%
YC ELECTRIC VEHICLE	3,303	3.28%	3,355	3.56%
ATUL AUTO LTD	2,299	2.28%	2,025	2.15%
SAERA ELECTRIC AUTO PVT LTD	2,006	1.99%	2,471	2.62%
DILLI ELECTRIC AUTO PVT LTD	1,674	1.66%	1,963	2.08%
MINI METRO EV L.L.P	1,031	1.02%	1,296	1.37%
ENERGY ELECTRIC VEHICLES	1,025	1.02%	1,069	1.13%
Others including EV	35,120	34.90%	33,862	35.90%
Total	1,00,625	100%	94,326	100%

Source: FADA Research

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Commercial Vehicle OEM	June'25	Market Share (%) June'25	June'24	Market Share (%) June'24
TATA MOTORS LTD	24,436	33.31%	26,031	37.82%
MAHINDRA & MAHINDRA LIMITED	19,683	26.83%	17,435	25.33%
MAHINDRA & MAHINDRA LIMITED	18,244	24.87%	16,043	23.31%
MAHINDRA LAST MILE MOBILITY LTD	1,439	1.96%	1,392	2.02%
ASHOK LEYLAND LTD	13,049	17.79%	11,399	16.56%
ASHOK LEYLAND LTD	12,890	17.57%	11,356	16.50%
SWITCH MOBILITY AUTOMOTIVE LTD	159	0.22%	43	0.06%
VE COMMERCIAL VEHICLES LTD	6,901	9.41%	5,943	8.63%
MARUTI SUZUKI INDIA LTD	3,296	4.49%	2,891	4.20%
FORCE MOTORS LIMITED	2,036	2.78%	1,542	2.24%
DAIMLER INDIA COMMERCIAL VEHICLES PVT. LTD	1,641	2.24%	1,502	2.18%
SML ISUZU LTD	1,639	2.23%	1,654	2.40%
Others	686	0.94%	428	0.62%
Total	73,367	100.00%	68,825	100.00%

Source: FADA Research

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Construction Equipment OEM	June'25	Market Share (%) June'25	June'24	Market Share (%) June'24
JCB INDIA LIMITED	2,389	27.92%	2,533	45.86%
ACTION CONSTRUCTION EQUIPMENT LTD.	884	10.33%	734	13.29%
AJAX ENGINEERING LTD	649	7.58%	340	6.16%
ESCORTS KUBOTA LIMITED (CONSTRUCTION EQUIPMENT)	510	5.96%	426	7.71%
CASE NEW HOLLAND CONSTRUCTION EQUIPMENT(I) PVT LTD	473	5.53%	121	2.19%
LIUGONG INDIA PVT. LTD	469	5.48%	70	1.27%
MAHINDRA & MAHINDRA LIMITED	340	3.97%	106	1.92%
TATA HITACHI CONSTRUCTION MACHINERY COMP. PVT LTD	390	4.56%	109	1.97%
M/S SCHWING STETTER (INDIA) PRIVATE LIMITED	257	3.00%	86	1.56%
INDO FARM EQUIPMENT LIMITED	256	2.99%	58	1.05%
CATERPILLAR INDIA PRIVATE LIMITED	246	2.87%	174	3.15%
BULL MACHINES PVT LTD	194	2.27%	81	1.47%
ALL TERRAIN CRANE	155	1.81%	94	1.70%
DOOSAN BOBCAT INDIA PVT LTD	130	1.52%	33	0.60%
VOLVO CE INDIA PRIVATE LIMITED	103	1.20%	41	0.74%
Others	1,113	13.01%	517	9.36%
Total	8,558	100.00%	5,523	100.00%

Source: FADA Research

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PV OEM	June'25	Market Share (%) June'25	June'24	Market Share (%) June'24
MARUTI SUZUKI INDIA LTD	1,16,544	39.15%	1,15,919	39.89%
MAHINDRA & MAHINDRA LIMITED	40,919	13.74%	36,741	12.64%
HYUNDAI MOTOR INDIA LTD	38,306	12.87%	39,201	13.49%
TATA MOTORS LTD	34,930	11.73%	38,157	13.13%
TOYOTA KIRLOSKAR MOTOR PVT LTD	22,543	7.57%	19,531	6.72%
KIA INDIA PRIVATE LIMITED	18,005	6.05%	16,821	5.79%
SKODA AUTO VOLKSWAGEN GROUP	7,661	2.57%	5,705	1.96%
SKODA AUTO VOLKSWAGEN INDIA PVT LTD	7,601	2.55%	5,656	1.95%
VOLKSWAGEN AG/INDIA PVT. LTD.	35	0.01%	-	0.00%
AUDI AG	22	0.01%	48	0.02%
SKODA AUTO INDIA/AS PVT LTD	3	0.00%	1	0.00%
JSW MG MOTOR INDIA PVT LTD	4,954	1.66%	3,841	1.32%
HONDA CARS INDIA LTD	3,859	1.30%	4,342	1.49%
RENAULT INDIA PVT LTD	2,552	0.86%	3,002	1.03%
MERCEDES -BENZ GROUP	1,390	0.47%	1,214	0.42%
MERCEDES-BENZ INDIA PVT LTD	1,274	0.43%	1,114	0.38%
MERCEDES -BENZ AG	104	0.03%	89	0.03%
DAIMLER AG	12	0.00%	11	0.00%
NISSAN MOTOR INDIA PVT LTD	1,345	0.45%	1,602	0.55%
BMW INDIA PVT LTD	1,202	0.40%	1,058	0.36%
FORCE MOTORS LIMITED	570	0.19%	658	0.23%
JAGUAR LAND ROVER INDIA LIMITED	481	0.16%	363	0.12%
BYD INDIA PRIVATE LIMITED	476	0.16%	243	0.08%
PCA AUTOMOBILES INDIA PVT LTD	421	0.14%	522	0.18%
FCA INDIA AUTOMOBILES PRIVATE LIMITED	264	0.09%	297	0.10%
Others	1,300	0.44%	1,376	0.47%
Total	2,97,722	100%	2,90,593	100%

Source: FADA Research

Disclaimer:

1. The above numbers do not have figures from TS.
2. Vehicle Retail Data has been collated as on 04.07.25 in collaboration with Ministry of Road Transport & Highways, Government of India and has been gathered from 1,386 out of 1,445 RTOs.



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Tractor OEM	June'25	Market Share (%) June'25	June'24	Market Share (%) June'24
MAHINDRA & MAHINDRA LIMITED (TRACTOR)	17,518	22.69%	16,335	22.99%
MAHINDRA & MAHINDRA LIMITED (SWARAJ DIVISION)	14,286	18.50%	13,303	18.72%
INTERNATIONAL TRACTORS LIMITED	10,136	13.13%	9,249	13.02%
TAFE LIMITED	9,804	12.70%	8,649	12.17%
ESCORTS KUBOTA LIMITED (AGRI MACHINERY GROUP)	8,443	10.93%	7,545	10.62%
JOHN DEERE INDIA PVT LTD (TRACTOR DEVISION)	6,212	8.05%	5,495	7.73%
EICHER TRACTORS	4,698	6.08%	4,622	6.51%
CNH INDUSTRIAL (INDIA) PVT LTD	3,381	4.38%	2,865	4.03%
KUBOTA AGRICULTURAL MACHINERY INDIA PVT.LTD.	635	0.82%	1,223	1.72%
Others	2,101	2.72%	1,761	2.48%
Total	77,214	100%	71,047	100%

Source: FADA Research

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2. Vehicle Retail Data has been collated as on 04.07.25 in collaboration with Ministry of Road Transport & Highways, Government of India and has been gathered from 1,386 out of 1,445 RTOs.
3. Others include OEMs accounting less than 1% Market Share.