

ANNUAL INDIA EV REPORT CARD FY2022

Lead Sponsors

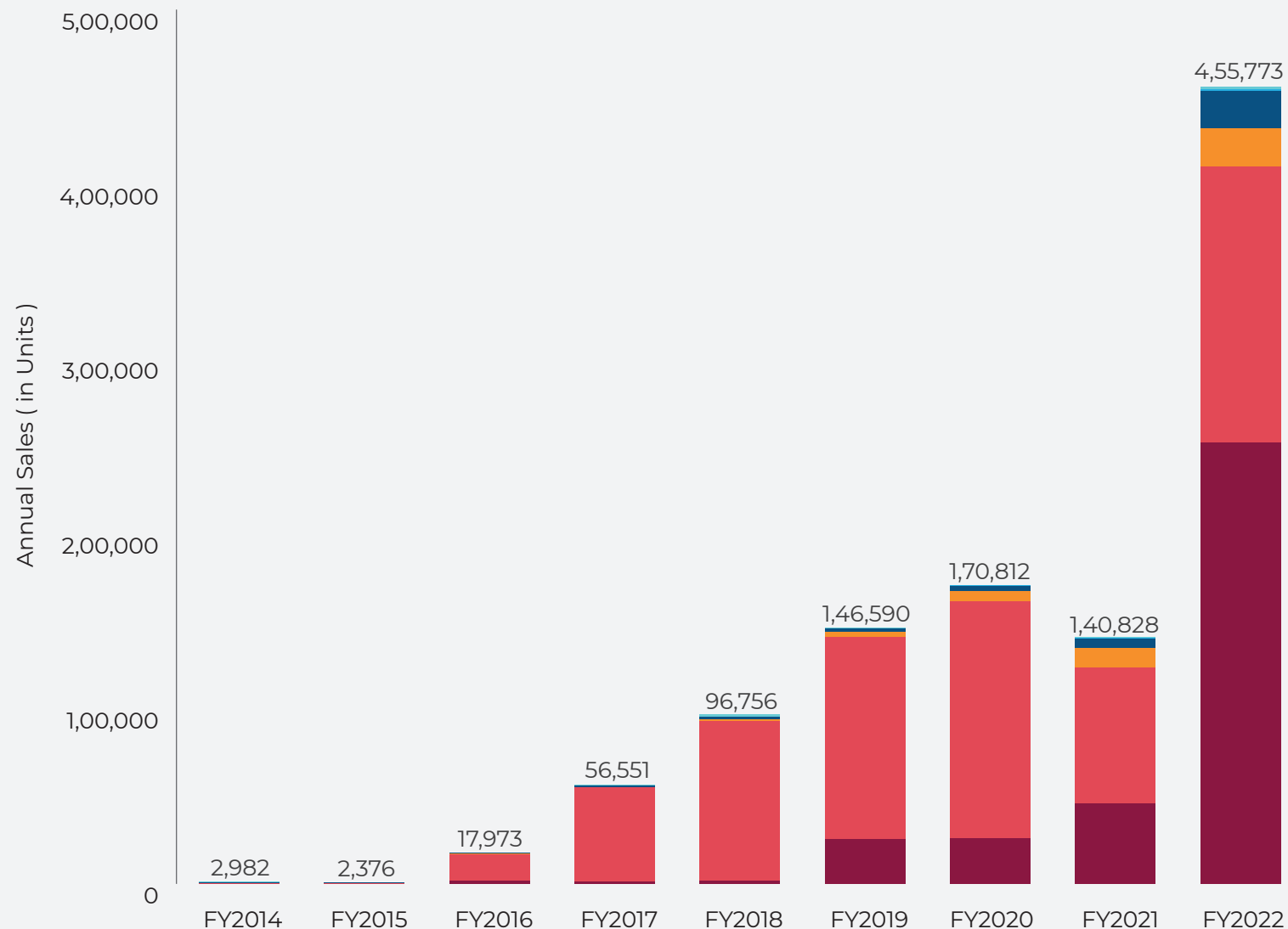


PHYLION

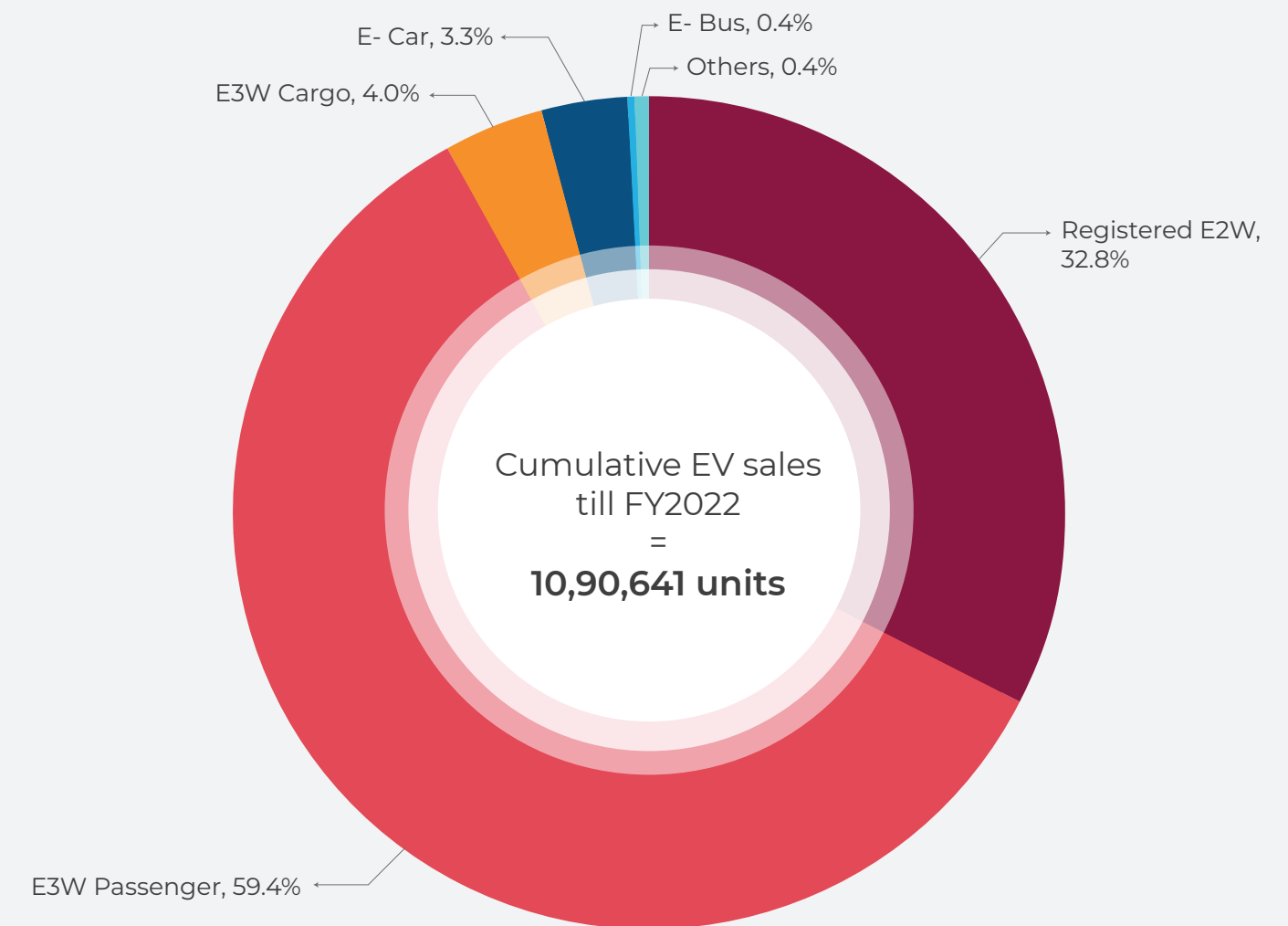
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EV SALES TREND IN INDIA

EV Annual Sales Trend in India (FY2014 - FY2022)



Vehicle Category-wise Market Share (Cumulative till FY2022)



Registered E2W E3W Passenger E3W Cargo E-Car E-Bus Others

Source: JMK Research Estimates, Vahan Dashboard, Telangana RTO, Company Press Release, JMK Research
Note: Others include adapted vehicles, fork-lifts, goods carriers, omni bus, agricultural tractors, and trailer (agriculture vehicles)

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PHYLION

Phylion Battery
World Famous Li-on Battery Supplier
6 years supply experience in Indian market

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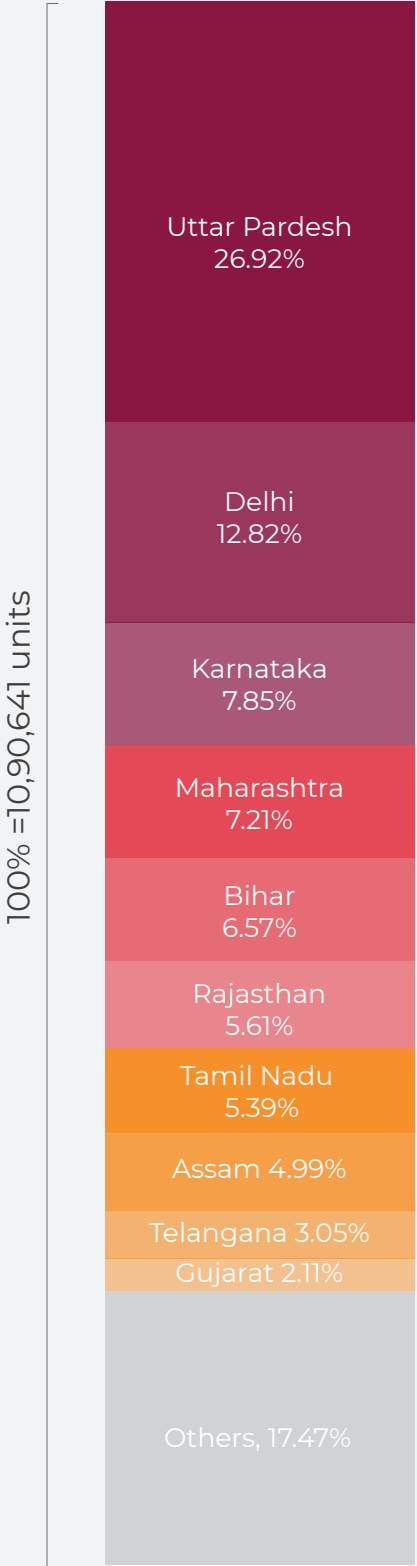
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FLEXA AC Wallbox
Let the energy drive you

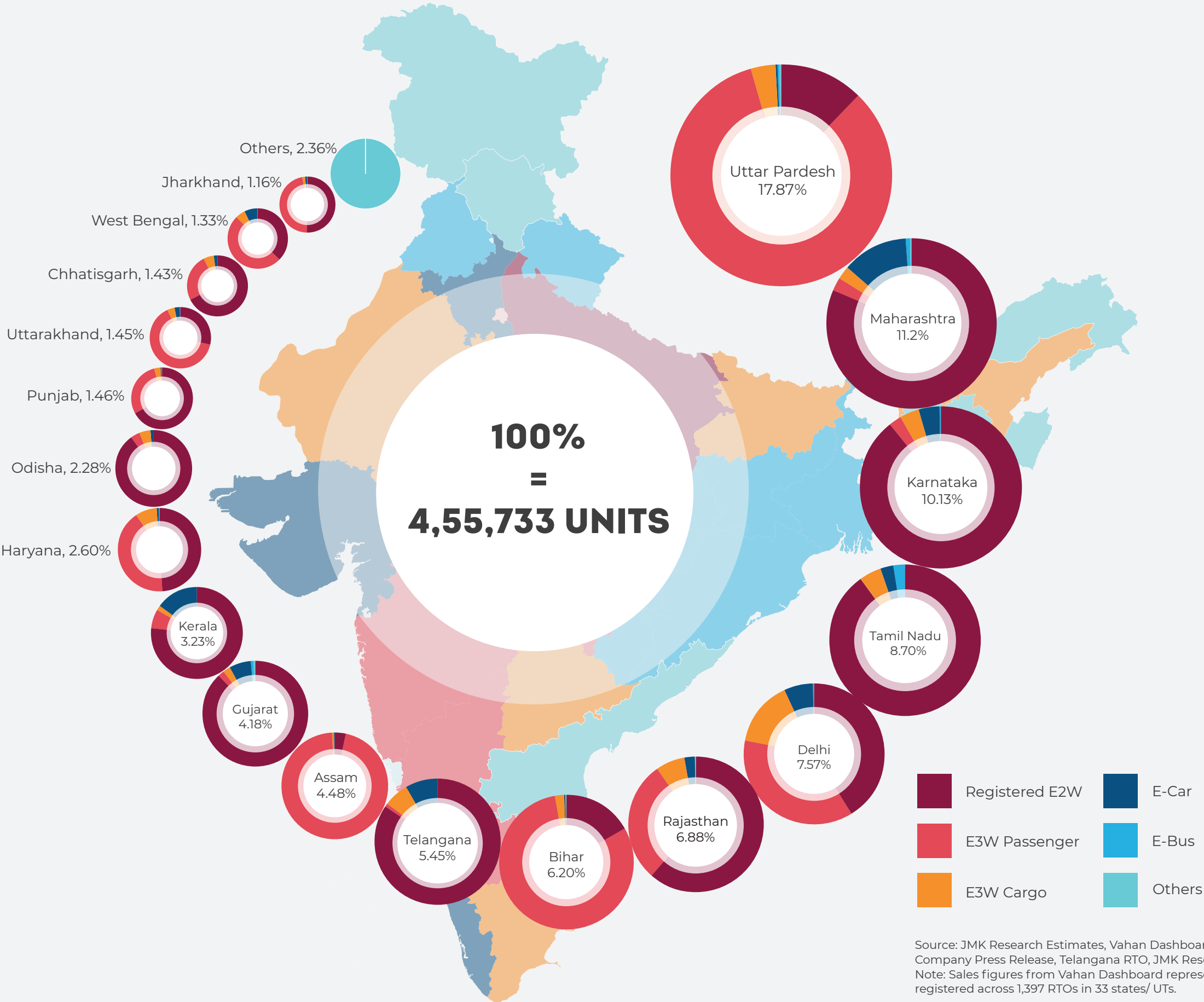


STATE-WISE SALES

State-wise Registered EV Cumulative Sales (Till FY2022)



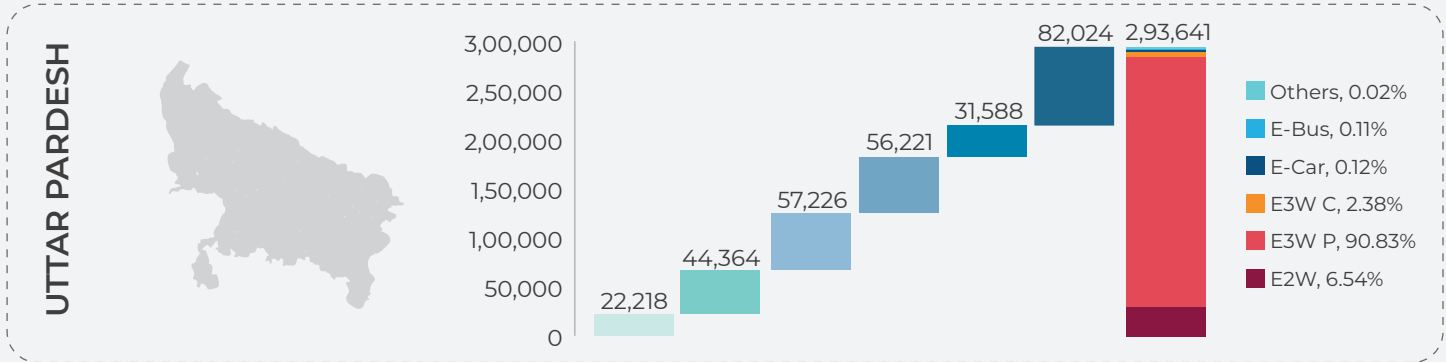
State-wise Registered EV Annual Sales (FY2022)



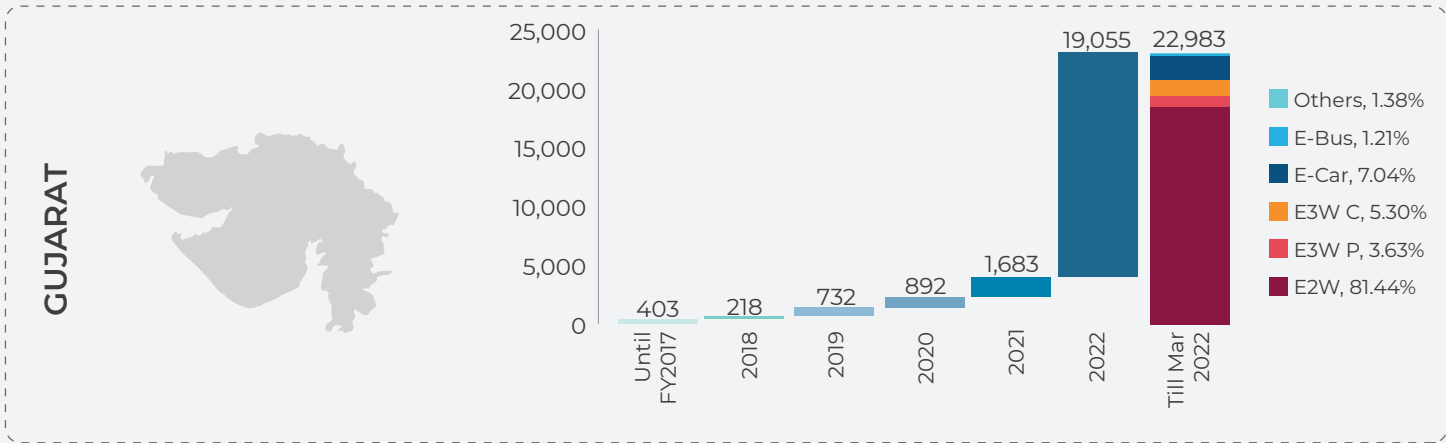
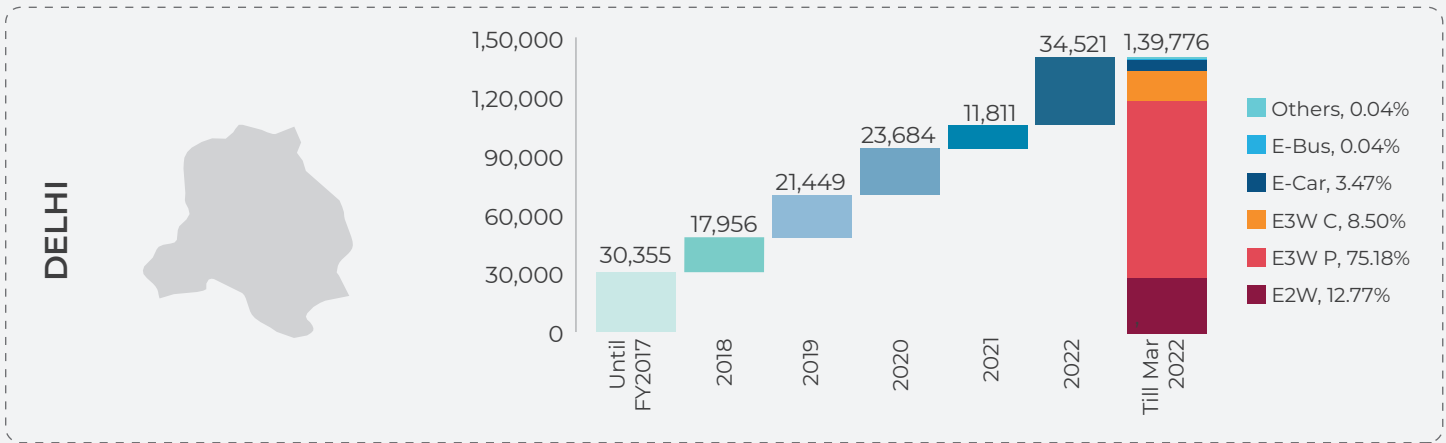
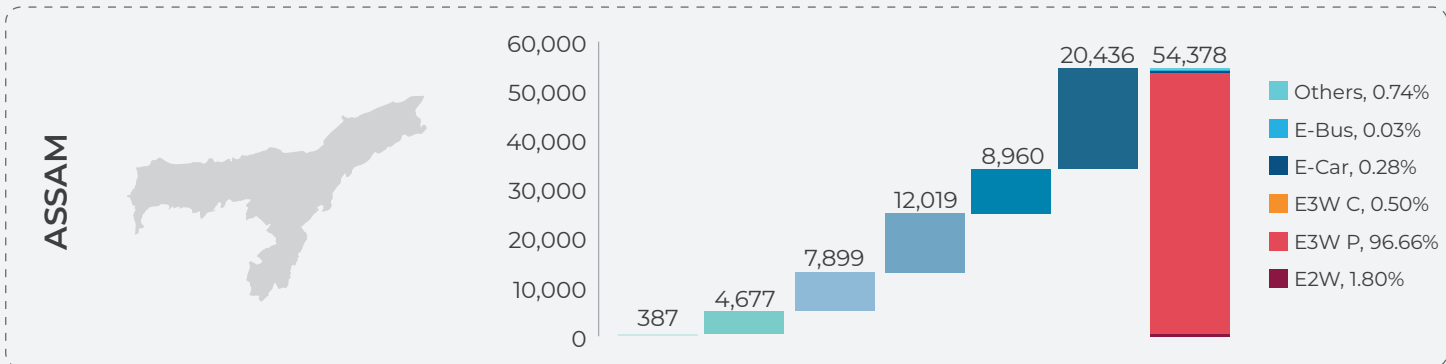
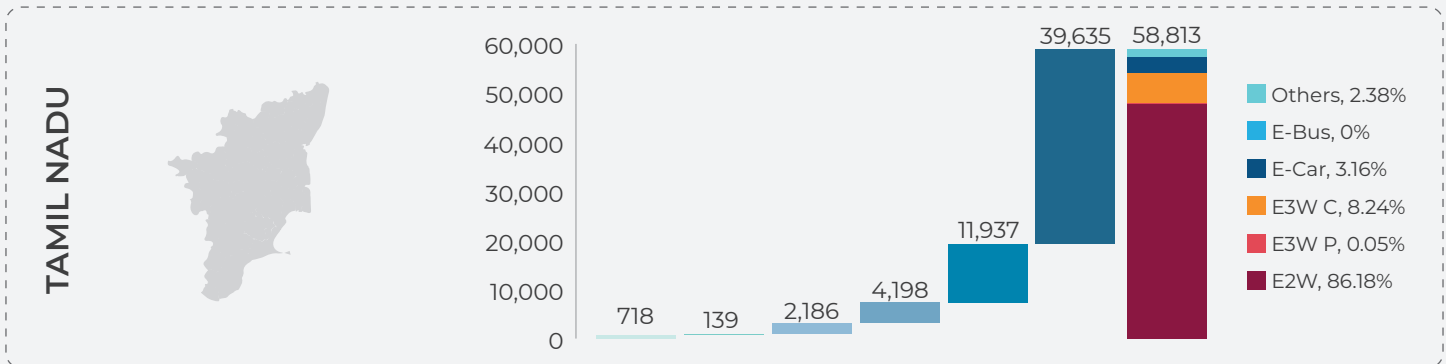
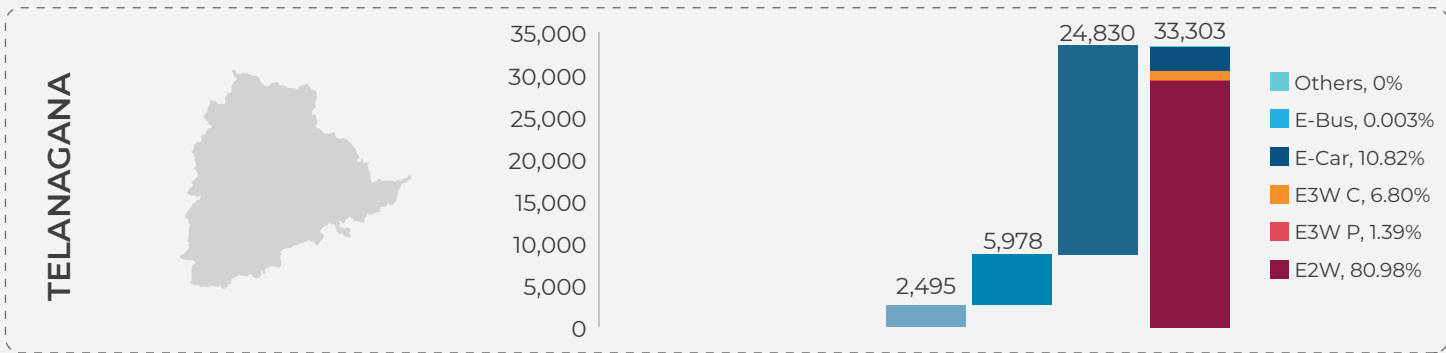
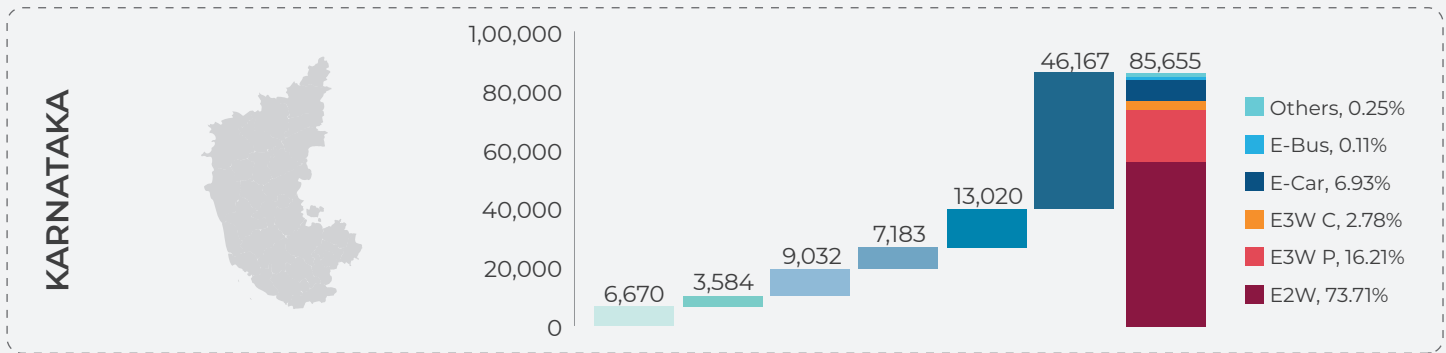
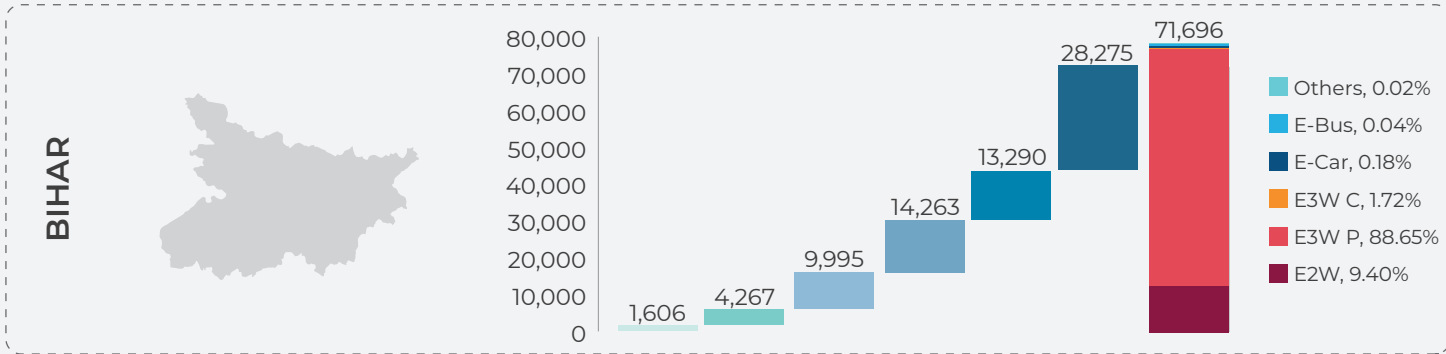
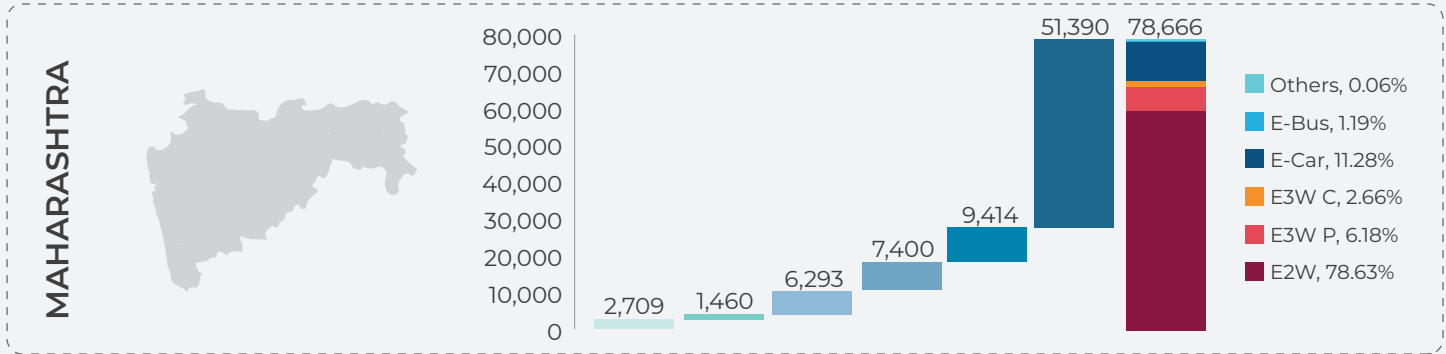
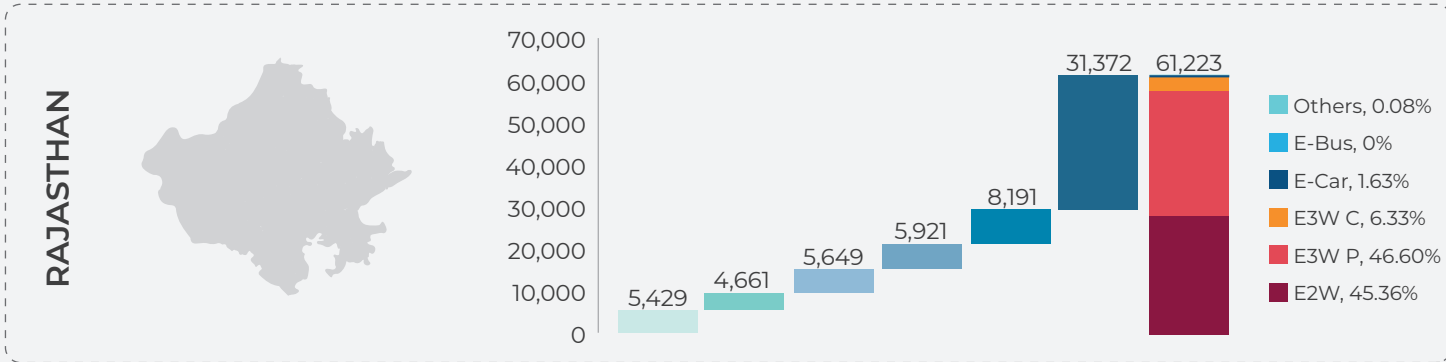
Source: JMK Research Estimates, Vahan Dashboard, Company Press Release, Telangana RTO, JMK Research
Note: Sales figures from Vahan Dashboard represent EVs registered across 1,397 RTOs in 33 states/ UTs.

STATE PROFILES

Year-wise & Vehicle Category-wise EV Sales Trend in India

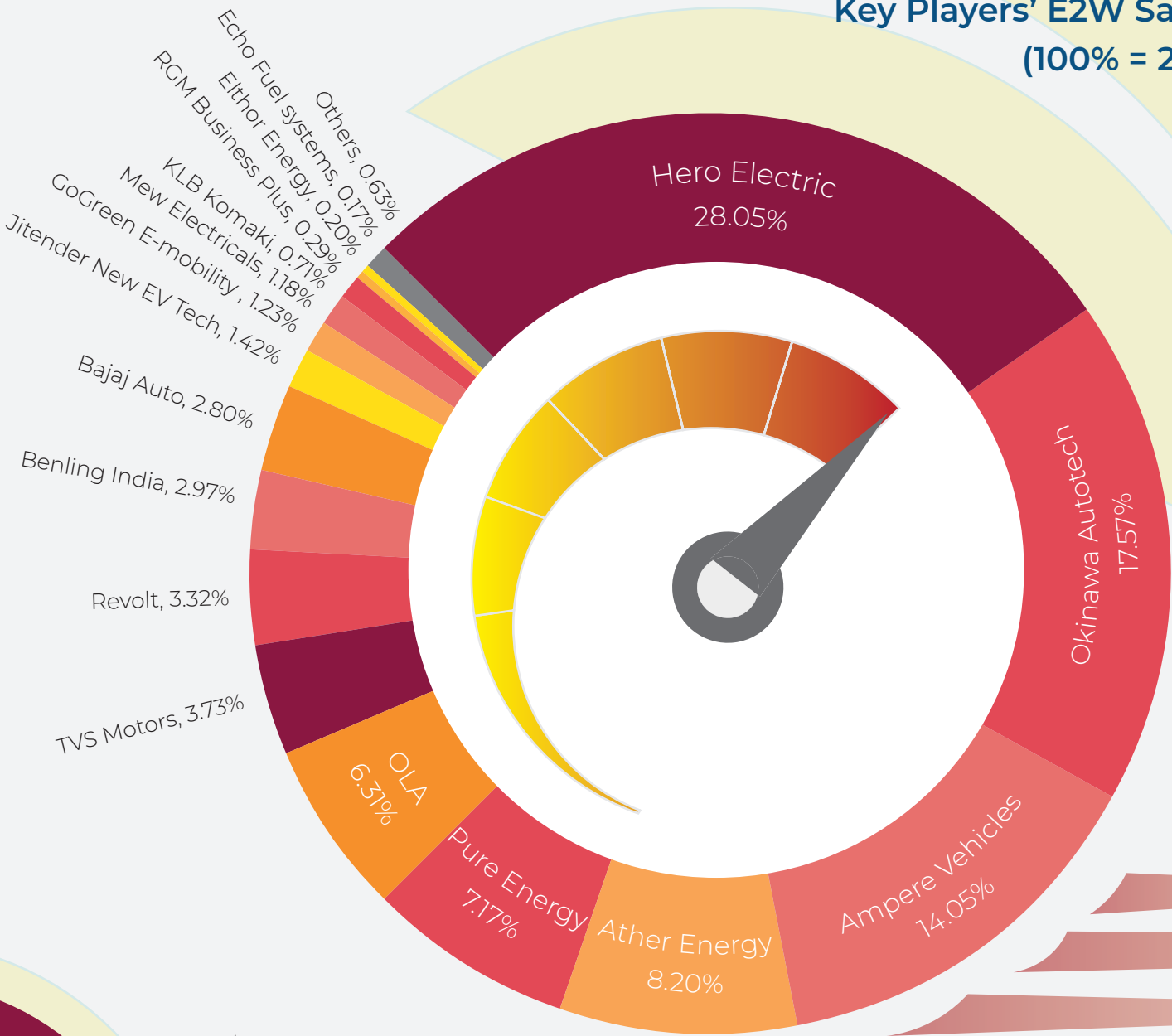


Year-wise & Vehicle Category-wise EV Sales Trend in India

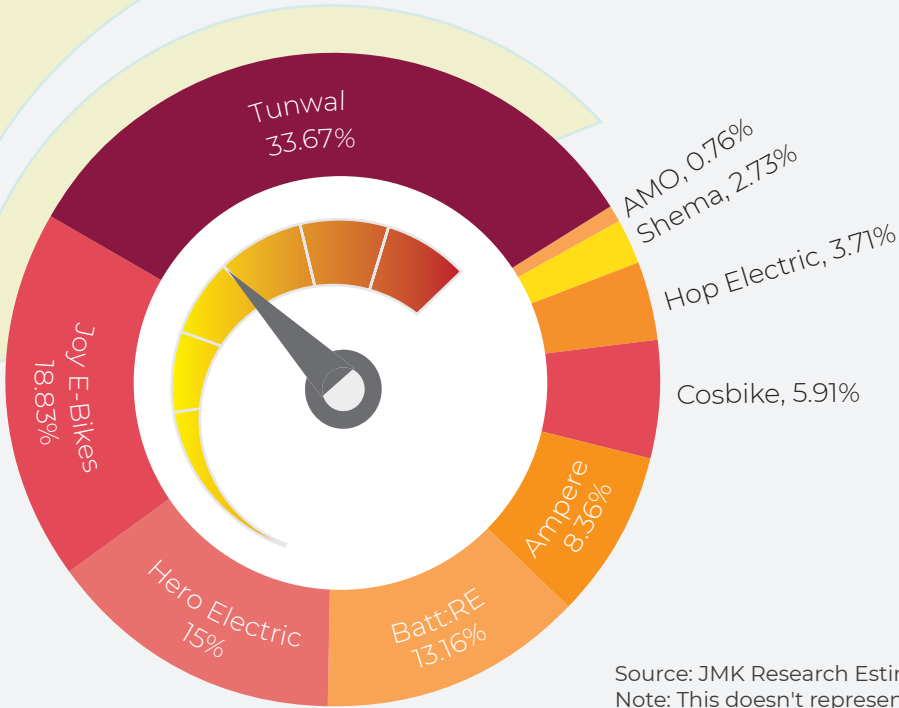


ELECTRIC TWO-WHEELERS

Key Players' E2W Sales (FY2022)- Registered
(100% = 2,69,138 Units)



Key Players' E2W Sales (FY2022)- Unregistered
(100%=1,67,172 UNITS)

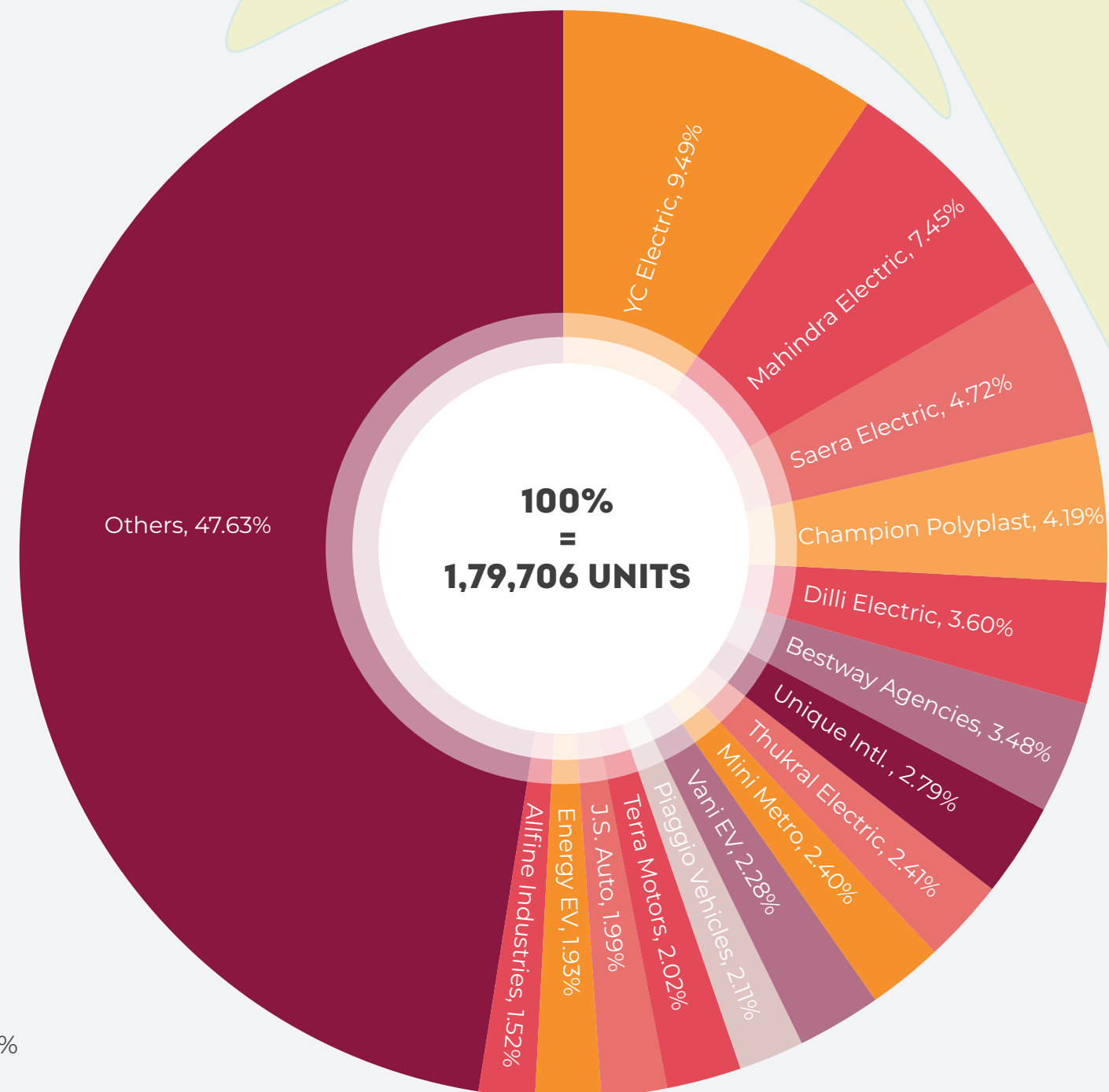


Source: JMK Research Estimates, Vahan Dashboard, Company website and Press Release, State RTO
Note: Sales figures from Vahan Dashboard represent E2W (Top speed > 25 kmph) registered across 1,397 RTOs in 33 states/ UTs.

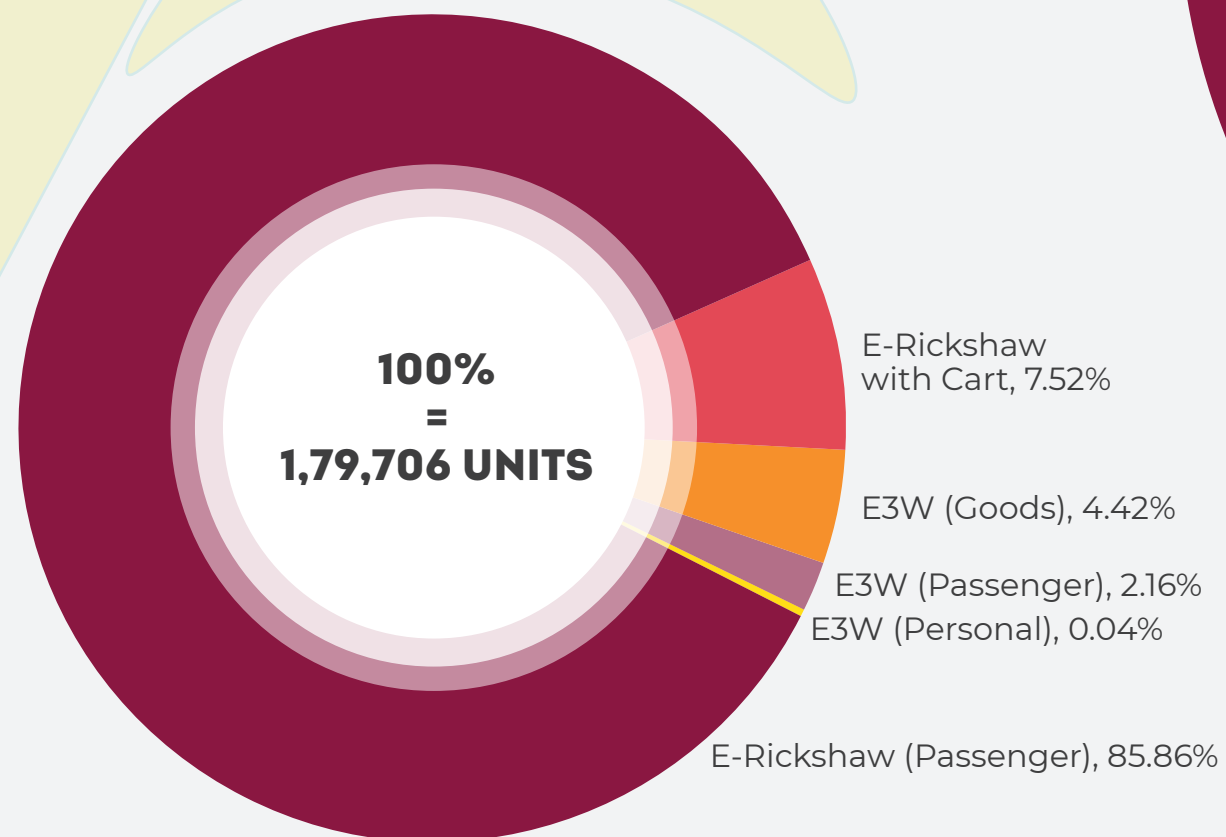
Source: JMK Research Estimates, Company Press Release, Company Interviews, JMK Research
Note: This doesn't represent the overall market size of unregistered E2Ws. The % share is indicative of only those players which have shared their data with us.

ELECTRIC THREE-WHEELERS

Player-wise E3W Sales' Share (FY2022)

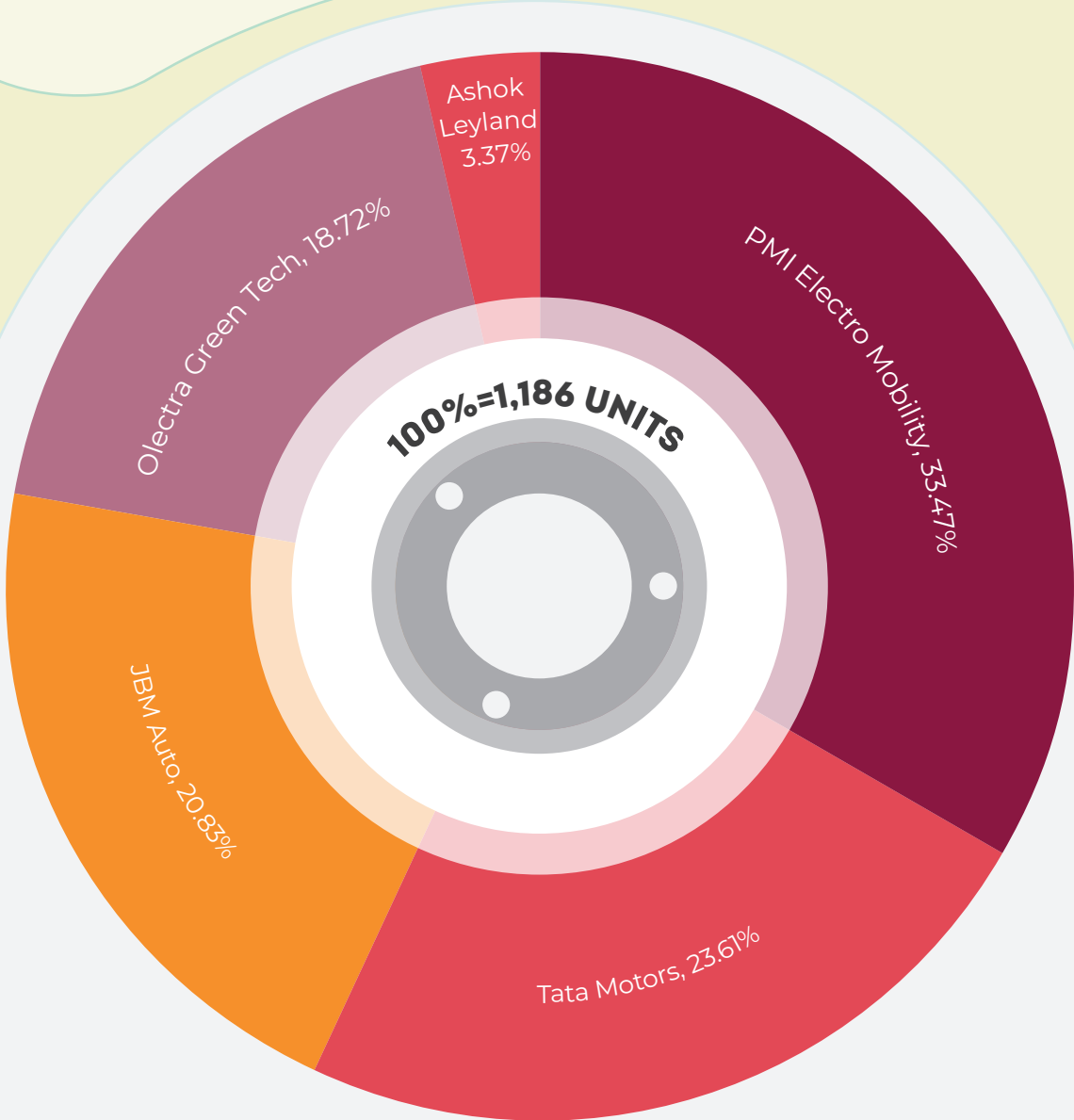


Category-wise E3W Sales' Share (FY2022)



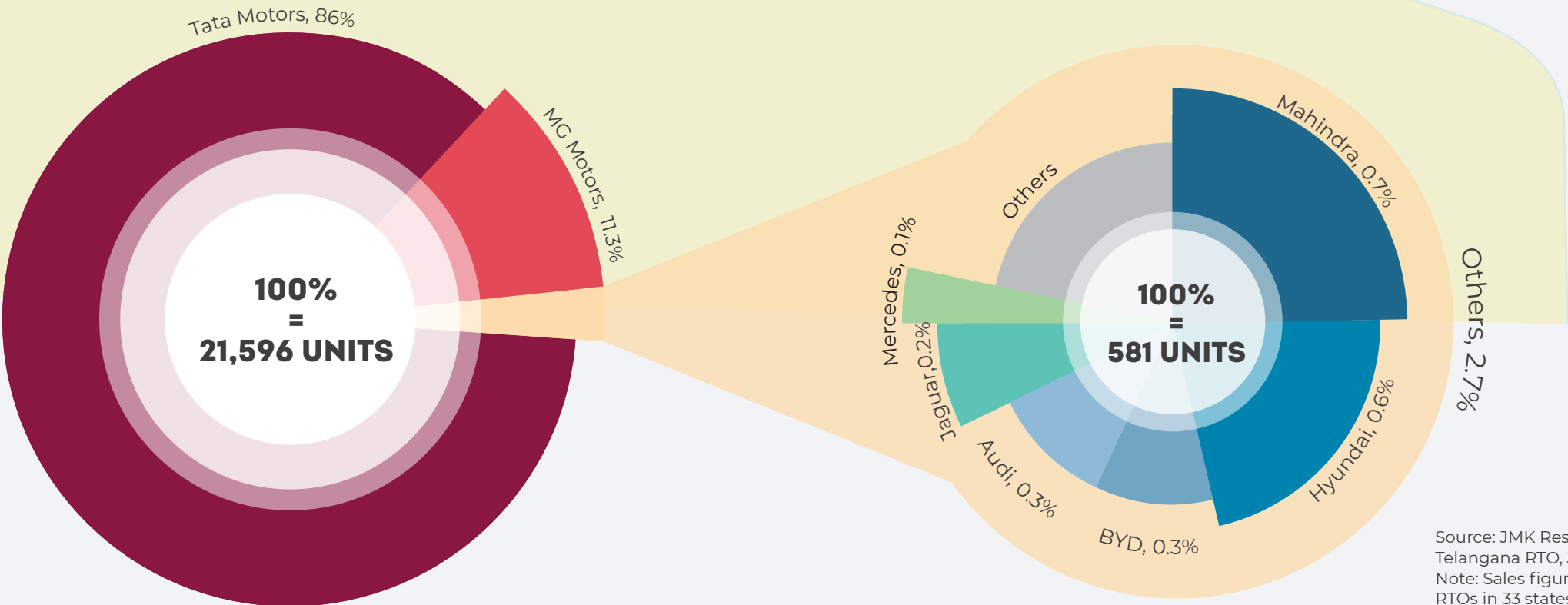
ELECTRIC BUSES

Player-wise E-Bus Sales' Share (FY2022)



Source: JMK Research Estimates, Vahan Dashboard, JMK Research
Note: Sales figures from Vahan Dashboard represent E-Buses registered across 1,397 RTOs in 33 states/ UTs;

Player-wise E-Car Sales' Share (FY2022)

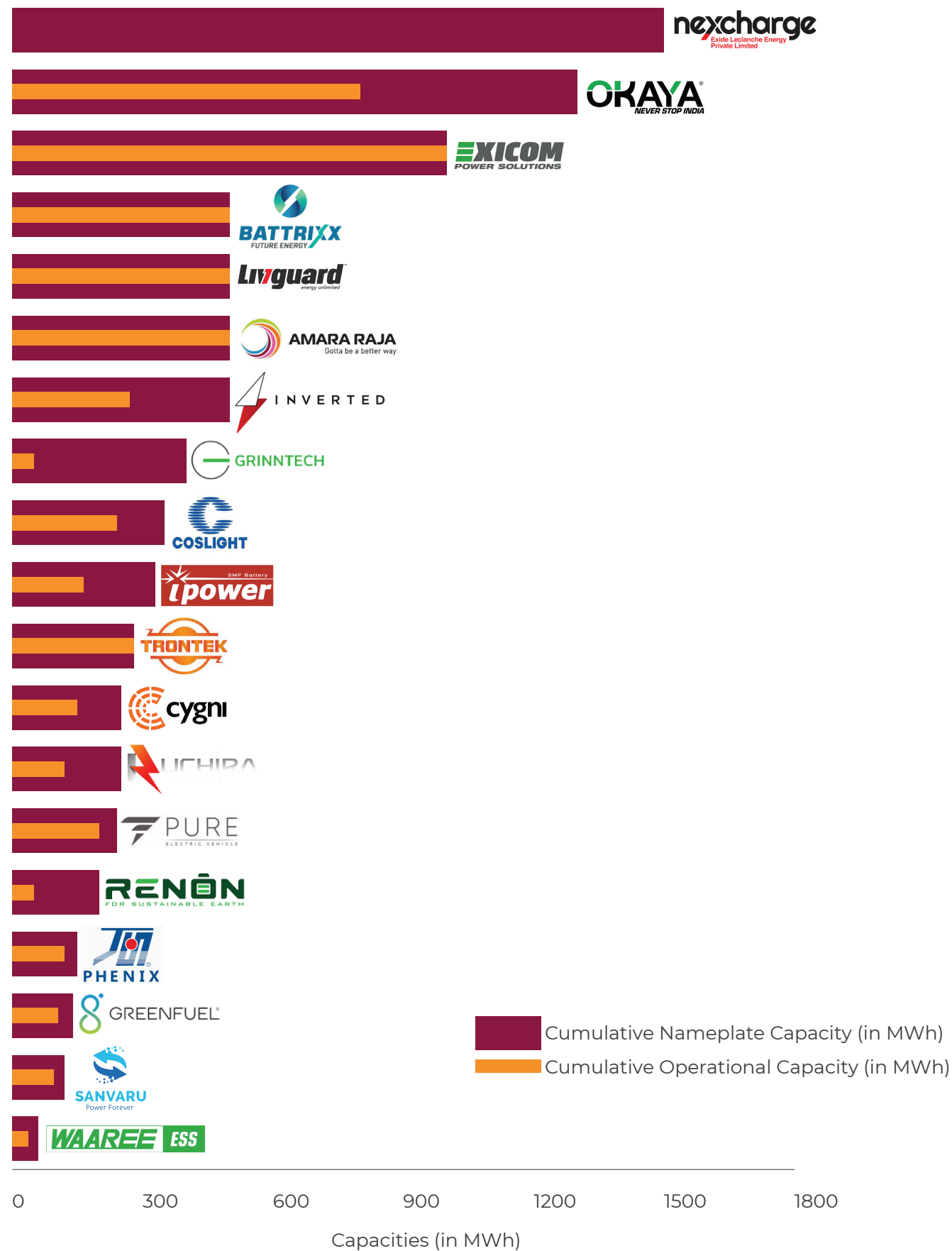


ELECTRIC CARS

Source: JMK Research Estimates, Vahan Dashboard, Company Press Release, Telangana RTO, JMK Research
Note: Sales figures from Vahan Dashboard represent E-Cars registered across 1,397 RTOs in 33 states/ UTs; Others include BMW, Volvo, and Porsche

BATTERY PACKS

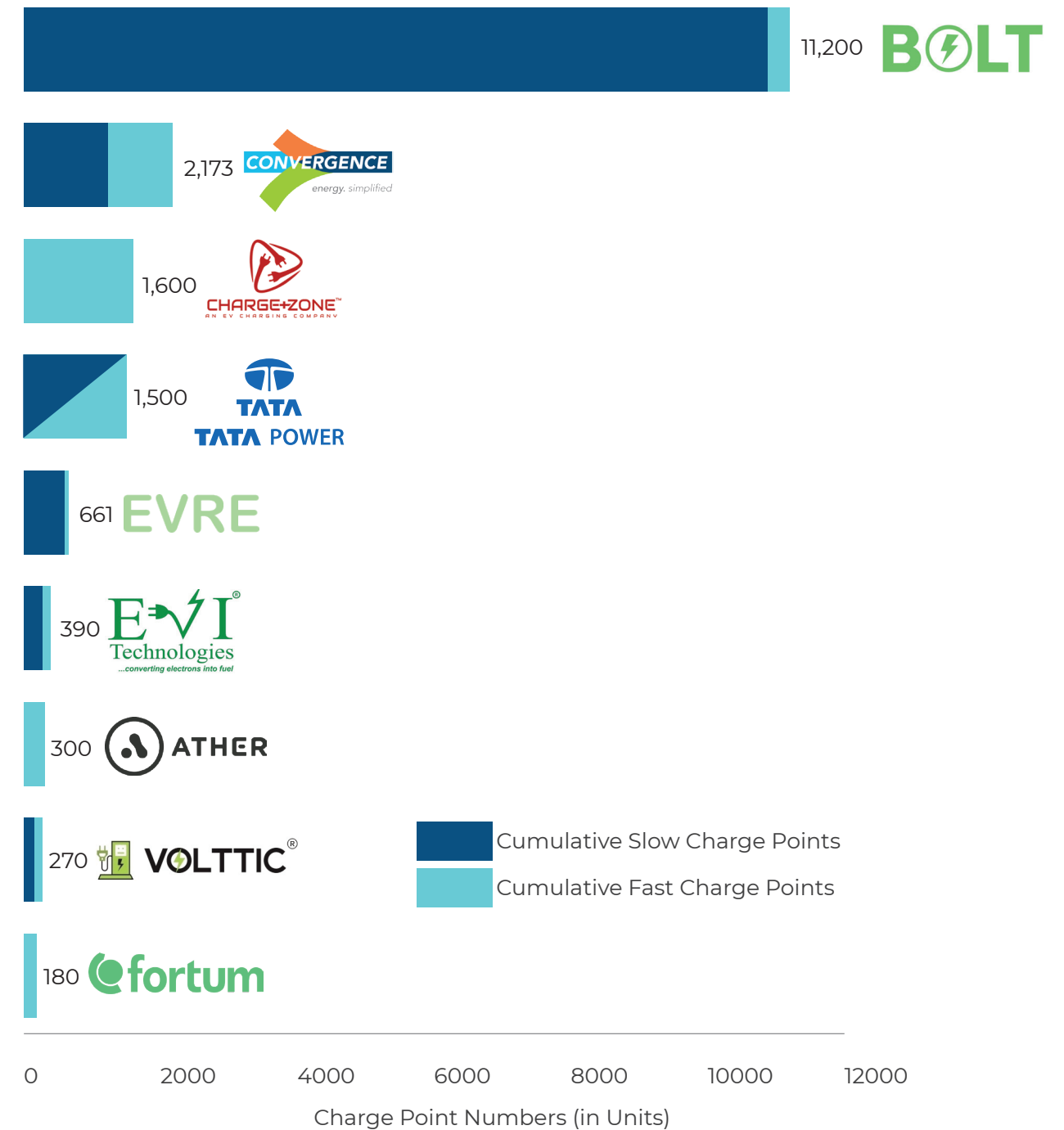
Nameplate & Operational Battery Pack Capacities (till FY2022)



Source: JMK Research estimates, Company Interviews, JMK Research
 Note:
 1. Nameplate Capacity is the full-load output a facility can achieve; Operational Capacity is the actual output a facility has
 2. Rest of the Battery Pack Manufacturers have not shared their capacity numbers, hence not included.

CHARGE POINTS

Installed Fast and Slow Charge Points (till FY2022)



Source: JMK Research estimates, Company Interviews, JMK Research
 Note:
 1. Slow charge points include AC001 charge points; Fast charge points include DC001 (30/60 kW)/ AC Level II/CCS (50/60kW), and combo charge points.
 2. Tata Power has not shared breakup of charge point numbers into slow and fast ones. Tata Power has an installed network of 1,500+ Public and Semi-Public charge points. Excludes 13,000+ Home chargers (for private use) & 200+ Bus charging points.
 4. BOLT's charge point count includes public charge points only and excludes private (home) charge points.
 3. Rest of the CPOs have not shared their numbers, hence not included.



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