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FEDERATION OF AUTOMOBILE DEALERS ASSOCIATIONS

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CIN U74140DL2004PNL130324

FOR IMMEDIATE RELEASE

FADA Releases July'25 Vehicle Retail Data

July '25 Auto-Retail Report:

- Overall Retail -4.31% YoY (MoM -1.98%)
- Category-wise retails:
 - 2W -6.48% YoY (MoM -6.28%)
 - 3W +0.83 % YoY (MoM 10.73%)
 - PV -0.81% YoY (MoM 10.38%)
 - Trac +10.96% YoY (MoM 14.9%)
 - CE -33.28% YoY (MoM -59%)
 - CV +0.23% YoY (MoM 4.19%)

Segment Highlights:

- **2W:** Crop-sowing and heavy monsoon rains dampened rural footfalls; purchase decisions deferred to August ahead of festive season.
- **PV:** Aashaada period and auspicious delivery days, plus targeted schemes and rural marketing, drove hinterland volumes; urban demand muted due to low enquiry and restrained customer sentiment; inventory level continues at around ~55 days.
- **CV:** Urban momentum led by new models, institutional orders and school-bus schemes; rural haulage fragmented by weather, logistics headwinds and slow financier disbursements.
- **Trac:** Robust growth underpinned by enhanced agri-subsidies and favourable rains, boosting rural liquidity and purchase intent.

Near-Term Outlook:

- Monsoon tailwinds and festival fervour should spur demand, yet export-tariff volatility and isolated flood risks call for vigilant risk management.
- Precision promotions, partnership-driven finance solutions and dynamic rural–urban engagement will be critical to convert latent demand into sustained retail growth.
- We enter August with guarded optimism, confident in the upside but mindful of the headwinds.



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

July'25 Retails

Reflecting on July 2025 Auto Retail results, FADA President Mr. C S Vigneshwar said: “After three consecutive months of growth, India’s auto retail sector applied the brakes in July, with overall retails declining by 4.31% YoY. This pullback largely stems from a high-base effect in July 2024, when an extreme heat wave was immediately followed by excessive rainfall, constraining volumes before a rebound later that month.

Segment-wise, 3W, Trac and CV achieved growth of 0.83%, 10.96% and 0.23% YoY respectively, whereas 2W, PV and CE contracted by 6.48%, 0.81% and 33.28% YoY.

In the 2W space, July saw a 6.48% YoY decline and a 6.28% MoM drop, as crop-sowing activities and prolonged heavy rains dampened rural footfalls more sharply than urban demand. Dealers are nevertheless confident of a post-monsoon uptick, with several purchase decisions deferred to August ahead of the festive season—making strategic stock alignment and focused rural–urban engagement imperative for reviving momentum.

The PV segment contracted by 0.81% YoY even as volumes surged 10.38% MoM, driven by robust rural demand. The Aashaada period and auspicious delivery days, combined with targeted schemes, new-model introductions and aggressive rural marketing, powered hinterland sales that picked up decisively towards month-end. Urban demand, however, remained muted due to low enquiry and restrained customer sentiment. With inventory levels steady at around 55 days, calibrated discounting, streamlined finance facilitation and intensified urban outreach will be crucial for sustaining festive-season growth.

CV posted a modest 0.23% YoY increase and a 4.19% MoM uptick, led by urban momentum. Dealers cited new-model launches, aggressive marketing support, bulk institutional orders and timely stock availability as key drivers, alongside targeted schemes that bolstered school-bus volumes. In contrast, rural haulage demand remained fragmented amid heavy rainfall, seasonal softness in cement, coal and construction logistics, and slower financier disbursements, prompting many buyers to defer purchases to the post-monsoon period.

Finally, the Trac segment delivered robust performance, with volumes up 10.96% YoY and 14.9% MoM. The timely release of enhanced agricultural subsidies and favourable monsoon rains—together with strengthened rural liquidity—spurred a marked increase in purchase intent. This resilience underscores the pivotal role of policy interventions in sustaining agri-rural demand.”

Near-Term Outlook

From an agrarian demand perspective, the monsoon outlook through September appears broadly supportive—India is projected to receive normal to above-normal rainfall (approximately 106 % of the long-period average), which should bolster crop prospects and rural liquidity—albeit with heightened localized flood and landslide risks in select eastern, northeastern and peninsular pockets. However, external headwinds have emerged as the U.S. administration’s imposition of an additional 25 % tariff on Indian exports has precipitated a 0.4 % dip in benchmark equity indices and a depreciation of the rupee, injecting volatility into financial markets. The resulting wealth erosion and import-cost pressures on exporters could erode consumer confidence, trigger a precautionary rise in household savings and exert downward pressure on discretionary spending—including on vehicles—over the near term.



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Dealer sentiment for the near-term (July–September) remains broadly constructive, with 63% of dealers forecasting growth, 27% expecting flat performance and only 9% bracing for degrowth. 2W members anticipate that the convergence of four major festivals—Rakhi, Janmashtami, Independence Day and Ganesh Chaturthi—alongside targeted promotional schemes, aggressive rural engagement and healthy stock levels will drive incremental sales, even as monsoon rains temper footfalls. PV dealers point to a similar festival-led uplift, underpinned by new model introductions, enhanced EV incentives and deepened finance support. CV dealers remain optimistic on the back of a robust order pipeline and increased rural liquidity from agricultural subsidies, which together offset seasonal logistical headwinds. In aggregate, a festival-driven demand uptick—bolstered by market-specific schemes, inventory readiness and resilient rural sentiment—underpins a positive near-term outlook.

While monsoon tailwinds and festival fervour converge to energise demand, the spectre of export-tariff volatility and isolated weather shocks underscores the need for vigilant stewardship. By harnessing precision-targeted promotions, partnership-driven finance solutions and dynamic rural–urban engagement, the industry can navigate these headwinds and anchor itself on a trajectory of sustained retail growth. In sum, we enter August with a sense of guarded optimism, confident in the upside but ever mindful of the risks.

Key Findings from our Online Members Survey

- **Liquidity**
 - Neutral 45.32%
 - Good 28.65%
 - Bad 26.02%

- **Sentiment**
 - Neutral 47.95%
 - Good 32.75%
 - Bad 19.30%

- **Expectation from August'25**
 - Growth 59.06%
 - Flat 31.87%
 - De-growth 09.06%

Chart showing Vehicle Retail Data for July'25

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

CATEGORY	YTD FY'26	YTD FY'25	Growth %
2W	61,62,619	60,20,223	2.37%
3W	4,16,275	3,83,238	8.62%
CV	3,11,951	3,09,059	0.94%
CE	24,568	24,240	1.35%
PV	13,09,676	12,78,236	2.46%
TRAC	2,98,978	2,77,691	7.67%
Total	85,24,067	82,92,687	2.79%



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All India Vehicle Retail Data for July'25

CATEGORY	July'25	June'25	July'24	MoM%	YoY%
2W	13,55,504	14,46,387	14,49,487	-6.28%	-6.48%
3W	1,11,426	1,00,625	1,10,511	10.73%	0.83%
E-RICKSHAW(P)	39,798	35,367	44,462	12.53%	-10.49%
E-RICKSHAW WITH CART (G)	6,813	6,846	5,186	-0.48%	31.37%
THREE-WHEELER (GOODS)	9,862	9,468	10,197	4.16%	-3.29%
THREE-WHEELER (PASSENGER)	54,861	48,848	50,593	12.31%	8.44%
THREE-WHEELER (PERSONAL)	92	96	73	-4.17%	26.03%
PV	3,28,613	2,97,722	3,31,280	10.38%	-0.81%
TRAC	88,722	77,214	79,961	14.90%	10.96%
CE	3,509	8,558	5,259	-59.00%	-33.28%
CV	76,439	73,367	76,261	4.19%	0.23%
LCV	45,808	44,469	45,565	3.01%	0.53%
MCV	7,414	7,393	6,712	0.28%	10.46%
HCV	23,154	21,447	23,912	7.96%	-3.17%
Others	63	58	72	8.62%	-12.50%
Total	19,64,213	20,03,873	20,52,759	-1.98%	-4.31%

Source: FADA Research

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

Two-Wheeler	July'25	June'25	July'24
PETROL/ETHANOL	92.12%	92.50%	92.55%
EV	7.60%	7.28%	7.43%
CNG/LPG	0.28%	0.22%	0.02%
Total	100%	100%	100%

Three-Wheeler	July'25	June'25	July'24
EV	62.06%	60.18%	57.63%
CNG/LPG	26.78%	28.24%	30.81%
DIESEL	10.78%	11.16%	10.76%
PETROL/ETHANOL	0.38%	0.42%	0.80%
Total	100%	100%	100%

Commercial Vehicle	July'25	June'25	July'24
Diesel	81.46%	82.21%	82.73%
CNG/LPG	12.26%	11.83%	10.73%
PETROL/ETHANOL	4.59%	4.34%	5.43%
EV	1.63%	1.56%	1.07%
HYBRID	0.06%	0.05%	0.03%
Total	100%	100%	100%

Construction Equipment	July'25	June'25	July'24
Diesel	99%	99.89%	99.94%
CNG/LPG	0.0%	0.01%	0.02%
PETROL/ETHANOL	0.0%	0.00%	0.04%
EV	1.1%	0.09%	0.00%
Total	100%	100%	100%

Passenger Vehicle	July'25	June'25	July'24
PETROL/ETHANOL	48.11%	48.15%	51.75%
Diesel	17.75%	18.48%	18.36%

Tractor	July'25	June'25	July'24
Diesel	99.99%	99.99%	99.98%
PETROL/ETHANOL	0.00%	0.01%	0.02%

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CNG/LPG	21.33%	20.82%	18.45%
HYBRID	8.08%	8.13%	9.01%
EV	4.73%	4.43%	2.43%
Total	100%	100%	100%

Source: FADA Research

Total	100%	100%	100%

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


Source: FADA Research



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

Category	MoM%	YoY%	Category	MoM%	YoY%
2W			CV		
Urban	1.21%	-0.31%	Urban	3.59%	2.56%
Rural	-11.84%	-11.17%	Rural	4.86%	-2.26%
Total	-6.28%	-6.48%	Total	4.19%	0.23%
3W			CE		
Urban	8.23%	-1.43%	Urban	-60.44%	-26.53%
Rural	12.92%	2.80%	Rural	-57.60%	-38.39%
Total	10.73%	0.83%	Total	-59.00%	-33.28%
PV			TRAC		
Urban	11.14%	-2.52%	Urban	19.23%	18.23%
Rural	9.16%	2.12%	Rural	13.93%	9.37%
Total	10.38%	-0.81%	Total	14.90%	10.96%
Total					
Urban	3.68%	-0.52%			
Rural	-6.63%	-7.53%			
Total	-1.98%	-4.31%			

Source: FADA Research

Disclaimer:

- 1- The above numbers do not have figures from TS.
- 2- Vehicle Retail Data has been collated as on 04.08.25 in collaboration with Ministry of Road Transport & Highways, Government of India and has been gathered from 1,386 out of 1,446 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 -----



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July'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 July'25 (YoY comparison)

Two-Wheeler OEM	July'25	Market Share (%) July'25	July'24	Market Share (%) July'24
HONDA MOTORCYCLE AND SCOOTER INDIA (P) LTD	3,45,802	25.51%	3,69,980	25.52%
HERO MOTOCORP LTD	3,39,548	25.05%	4,00,093	27.60%
TVS MOTOR COMPANY LTD	2,69,677	19.89%	2,52,045	17.39%
BAJAJ AUTO LTD	1,38,381	10.21%	1,61,936	11.17%
SUZUKI MOTORCYCLE INDIA PVT LTD	88,003	6.49%	80,309	5.54%
ROYAL-ENFIELD (UNIT OF EICHER LTD)	67,561	4.98%	58,685	4.05%
INDIA YAMAHA MOTOR PVT LTD	50,762	3.74%	54,822	3.78%
OLA ELECTRIC TECHNOLOGIES PVT LTD	17,852	1.32%	41,802	2.88%
ATHER ENERGY LTD	16,251	1.20%	10,218	0.70%
GREAVES ELECTRIC MOBILITY PVT LTD	4,199	0.31%	3,159	0.22%
PIAGGIO VEHICLES PVT LTD	2,527	0.19%	3,079	0.21%
CLASSIC LEGENDS PVT LTD	2,237	0.17%	2,206	0.15%
PUR ENERGY PVT LTD	1,688	0.12%	390	0.03%
BGAUSS AUTO PRIVATE LIMITED	1,595	0.12%	1,793	0.12%
RIVER MOBILITY PVT LTD	1,518	0.11%	222	0.02%
Others Including EV	7,903	0.58%	8,748	0.60%
Total	13,55,504	100%	14,49,487	100%

Source: FADA Research

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



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Three-Wheeler OEM	July'25	Market Share (%) July'25	July'24	Market Share (%) July'24
BAJAJ AUTO LTD	38,704	34.74%	38,730	35.05%
MAHINDRA & MAHINDRA LIMITED	10,492	9.42%	7,650	6.92%
MAHINDRA LAST MILE MOBILITY LTD	10,482	9.41%	7,545	6.83%
MAHINDRA & MAHINDRA LIMITED	10	0.01%	105	0.10%
PIAGGIO VEHICLES PVT LTD	6,901	6.19%	8,445	7.64%
TVS MOTOR COMPANY LTD	4,279	3.84%	1,982	1.79%
YC ELECTRIC VEHICLE	3,635	3.26%	3,856	3.49%
ATUL AUTO LTD	2,365	2.12%	2,376	2.15%
SAERA ELECTRIC AUTO PVT LTD	2,207	1.98%	2,573	2.33%
DILLI ELECTRIC AUTO PVT LTD	1,920	1.72%	2,268	2.05%
ENERGY ELECTRIC VEHICLES	1,235	1.11%	1,240	1.12%
Others including EV	39,688	35.62%	41,391	37.45%
Total	1,11,426	100%	1,10,511	100%

Source: FADA Research

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Commercial Vehicle OEM	July'25	Market Share (%) July'25	July'24	Market Share (%) July'24
TATA MOTORS LTD	25,244	33.03%	27,617	36.21%
MAHINDRA & MAHINDRA LIMITED	20,442	26.74%	19,039	24.97%
MAHINDRA & MAHINDRA LIMITED	18,950	24.79%	17,578	23.05%
MAHINDRA LAST MILE MOBILITY LTD	1,492	1.95%	1,461	1.92%
ASHOK LEYLAND LTD	14,174	18.54%	13,979	18.33%
ASHOK LEYLAND LTD	14,078	18.42%	13,940	18.28%
SWITCH MOBILITY AUTOMOTIVE LTD	96	0.13%	39	0.05%
VE COMMERCIAL VEHICLES LTD	7,125	9.32%	6,689	8.77%
MARUTI SUZUKI INDIA LTD	3,589	4.70%	3,543	4.65%
FORCE MOTORS LIMITED	1,950	2.55%	1,901	2.49%
SML ISUZU LTD	1,568	2.05%	1,431	1.88%
DAIMLER INDIA COMMERCIAL VEHICLES PVT. LTD	1,436	1.88%	1,581	2.07%
Others	911	1.19%	481	0.63%
Total	76,439	100.00%	76,261	100.00%

Source: FADA Research

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Construction Equipment OEM	July'25	Market Share (%) July'25	July'24	Market Share (%) July'24
JCB INDIA LIMITED	1,731	49.33%	2,293	43.60%
ACTION CONSTRUCTION EQUIPMENT LTD.	401	11.43%	751	14.28%
ESCORTS KUBOTA LIMITED (CONSTRUCTION EQUIPMENT)	204	5.81%	420	7.99%
AJAX ENGINEERING LTD	190	5.41%	352	6.69%
ALL TERRAIN CRANE	176	5.02%	92	1.75%
BULL MACHINES PVT LTD	110	3.13%	80	1.52%
CATERPILLAR INDIA PRIVATE LIMITED	79	2.25%	166	3.16%
MAHINDRA & MAHINDRA LIMITED	56	1.60%	82	1.56%
INDO FARM EQUIPMENT LIMITED	50	1.42%	85	1.62%
M/S SCHWING STETTER (INDIA) PRIVATE LIMITED	43	1.23%	76	1.45%
ASHOK LEYLAND LTD	40	1.14%	36	0.68%
SANY HEAVY INDUSTRY INDIA PVT LTD	36	1.03%	52	0.99%
Others	393	11.20%	774	14.72%
Total	3,509	100.00%	5,259	100.00%

Source: FADA Research

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PV OEM	July'25	Market Share (%) July'25	July'24	Market Share (%) July'24
MARUTI SUZUKI INDIA LTD	1,29,164	39.31%	1,32,426	39.97%
HYUNDAI MOTOR INDIA LTD	43,009	13.09%	44,271	13.36%
MAHINDRA & MAHINDRA LIMITED	42,207	12.84%	39,823	12.02%
TATA MOTORS LTD	40,486	12.32%	44,621	13.47%
TOYOTA KIRLOSKAR MOTOR PVT LTD	25,370	7.72%	22,821	6.89%
KIA INDIA PRIVATE LIMITED	19,494	5.93%	19,434	5.87%
SKODA AUTO VOLKSWAGEN GROUP	8,018	2.44%	6,527	1.97%
SKODA AUTO VOLKSWAGEN INDIA PVT LTD	7,960	2.42%	6,474	1.95%
VOLKSWAGEN AG/INDIA PVT. LTD.	38	0.01%	1	0.00%
AUDI AG	20	0.01%	47	0.01%
SKODA AUTO INDIA/AS PVT LTD	-	0.00%	5	0.00%
JSW MG MOTOR INDIA PVT LTD	6,033	1.84%	4,114	1.24%
HONDA CARS INDIA LTD	4,431	1.35%	5,035	1.52%
RENAULT INDIA PVT LTD	2,292	0.70%	3,124	0.94%
NISSAN MOTOR INDIA PVT LTD	1,514	0.46%	1,878	0.57%
MERCEDES -BENZ GROUP	1,306	0.40%	1,268	0.38%
MERCEDES-BENZ INDIA PVT LTD	1,188	0.36%	1,183	0.36%
MERCEDES -BENZ AG	104	0.03%	79	0.02%
DAIMLER AG	14	0.00%	6	0.00%
BMW INDIA PVT LTD	1,301	0.40%	1,164	0.35%
FORCE MOTORS LIMITED	729	0.22%	920	0.28%
PCA AUTOMOBILES INDIA PVT LTD	512	0.16%	472	0.14%
JAGUAR LAND ROVER INDIA LIMITED	478	0.15%	529	0.16%
BYD INDIA PRIVATE LIMITED	459	0.14%	356	0.11%
Others	1,810	0.55%	2,497	0.75%
Total	3,28,613	100%	3,31,280	100%

Source: FADA Research

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Tractor OEM	July'25	Market Share (%) July'25	July'24	Market Share (%) July'24
MAHINDRA & MAHINDRA LIMITED (TRACTOR)	20,610	23.23%	18,436	23.06%
MAHINDRA & MAHINDRA LIMITED (SWARAJ DIVISION)	16,725	18.85%	16,267	20.34%
INTERNATIONAL TRACTORS LIMITED	12,536	14.13%	11,147	13.94%
TAFE LIMITED	9,649	10.88%	7,871	9.84%
ESCORTS KUBOTA LIMITED (AGRI MACHINERY GROUP)	9,196	10.36%	8,273	10.35%
JOHN DEERE INDIA PVT LTD (TRACTOR DEVISION)	7,027	7.92%	6,237	7.80%
EICHER TRACTORS	6,166	6.95%	5,417	6.77%
CNH INDUSTRIAL (INDIA) PVT LTD	3,872	4.36%	3,016	3.77%
KUBOTA AGRICULTURAL MACHINERY INDIA PVT.LTD.	569	0.64%	1,462	1.83%
Others	2,372	2.67%	1,835	2.29%
Total	88,722	100%	79,961	100%

Source: FADA Research

Disclaimer:

1. The above numbers do not have figures from TS.
2. Vehicle Retail Data has been collated as on 04.08.25 in collaboration with Ministry of Road Transport & Highways, Government of India and has been gathered from 1,386 out of 1,446 RTOs.
3. Others include OEMs accounting less than 1% Market Share.