



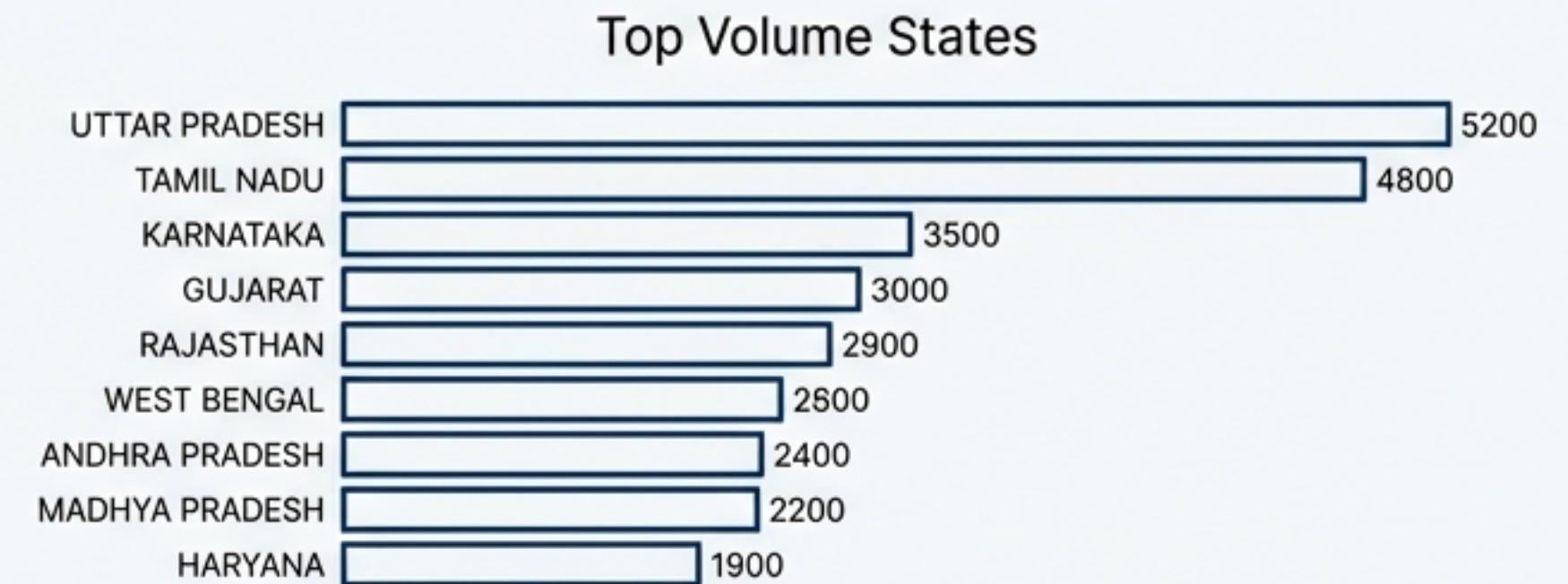
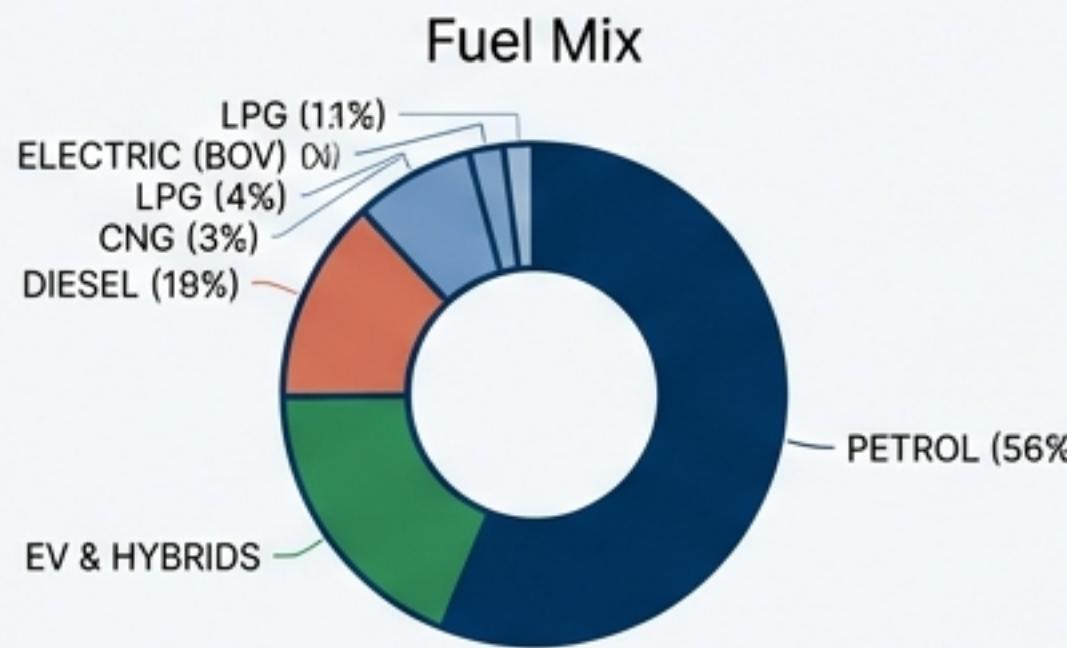
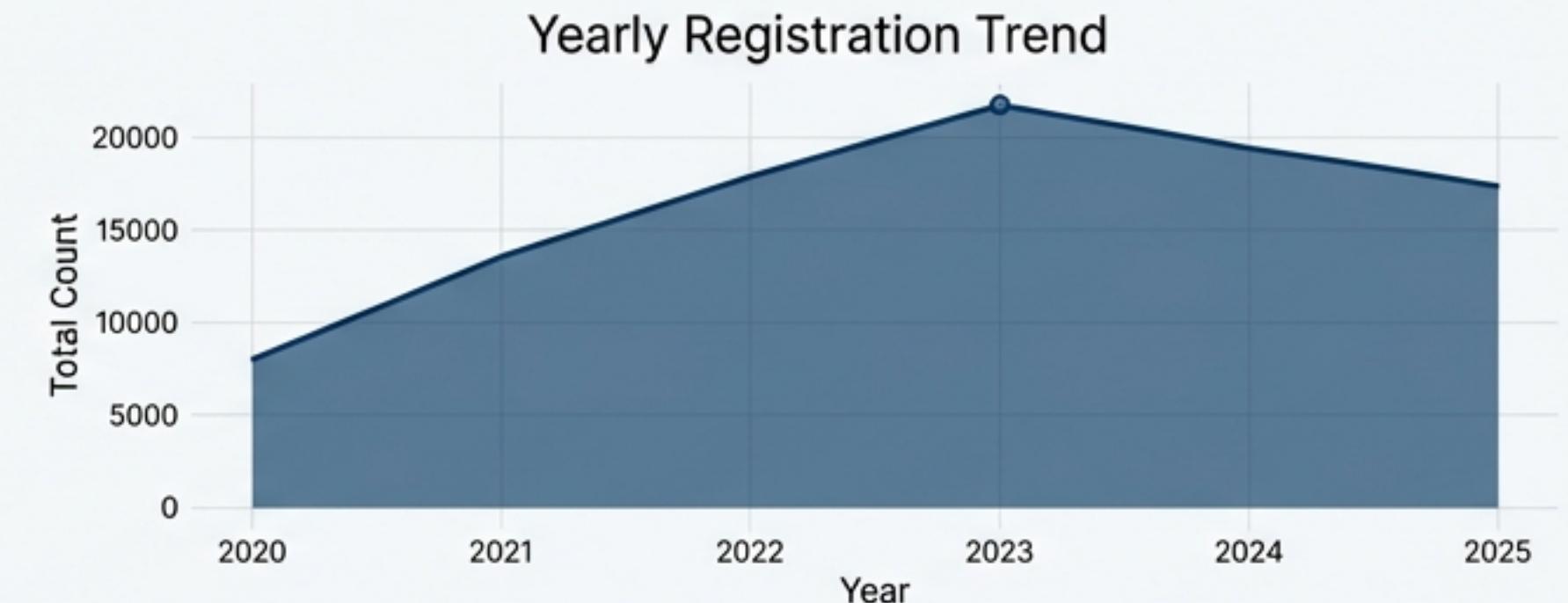
India Vehicle Registration Analysis & Forecasting (2020–2025)

Navigating Post-Pandemic Recovery and the Green Mobility Transition

Executive Summary: A V-Shaped Recovery Stabilising into Mature Growth

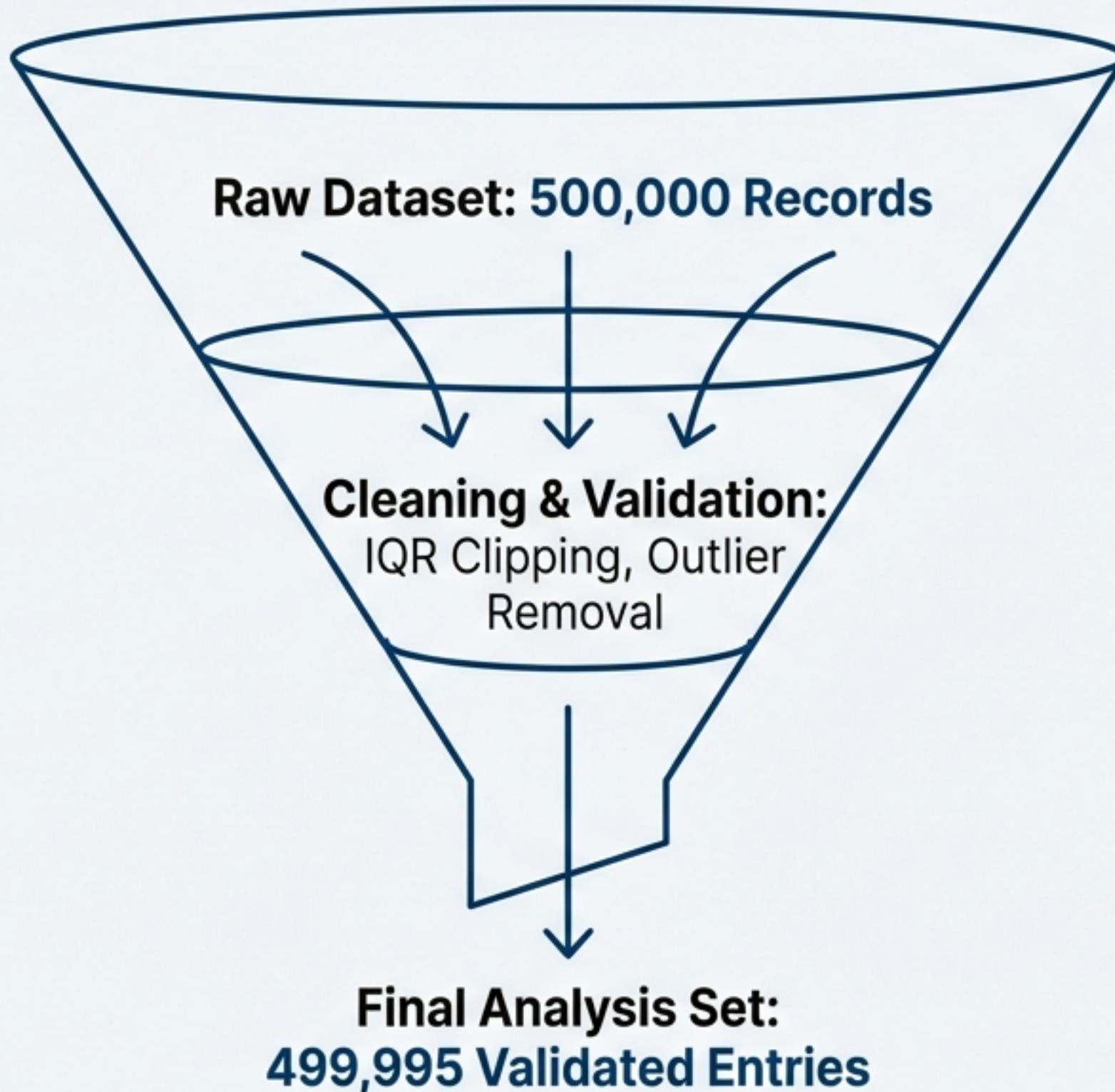
71.3%

Market Growth (2021) post-pandemic



Strategic Pivot: The market has shifted from a 'Recovery Phase' (2021–2022) to a 'Transition Phase' (2024–2025), characterised by stable volume growth (1.3–1.6% YoY) and rapid technology diversification.

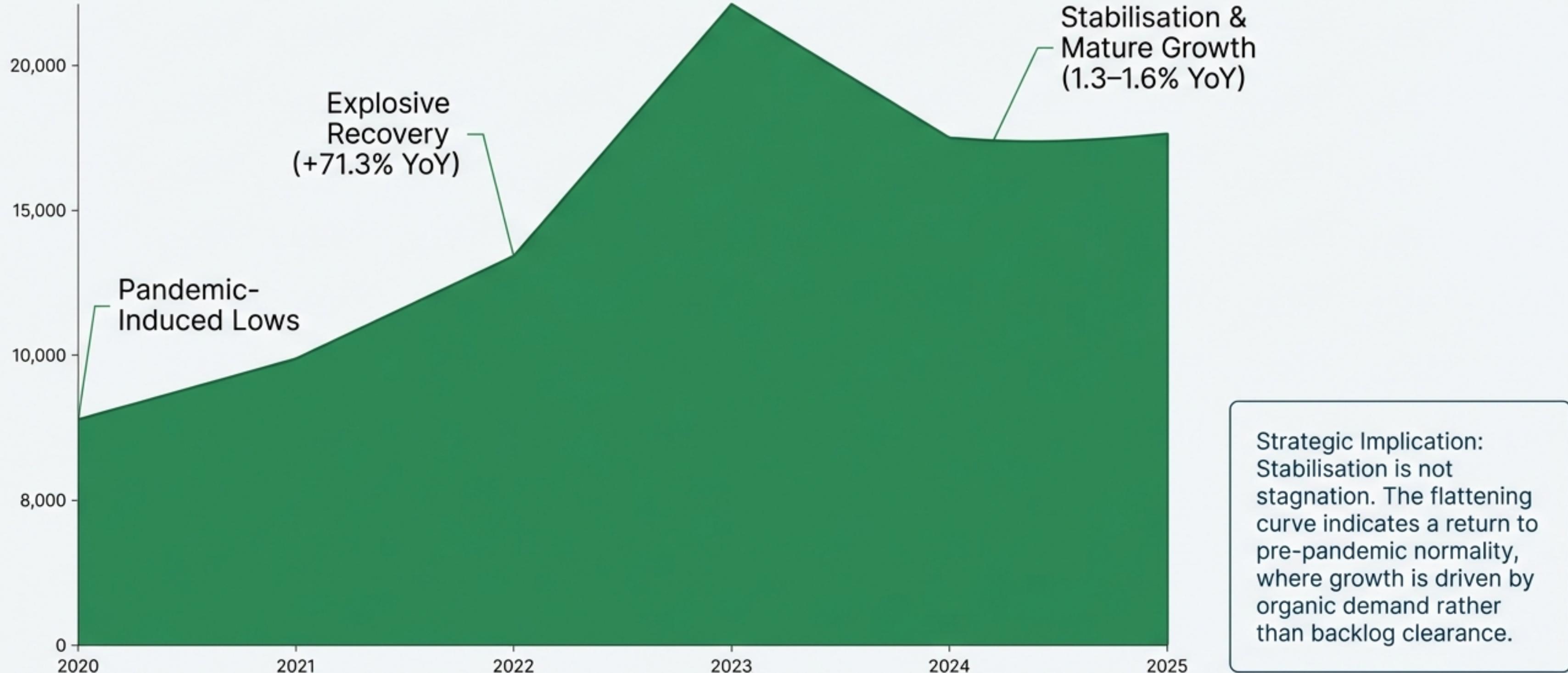
Data Integrity & Analytical Scope



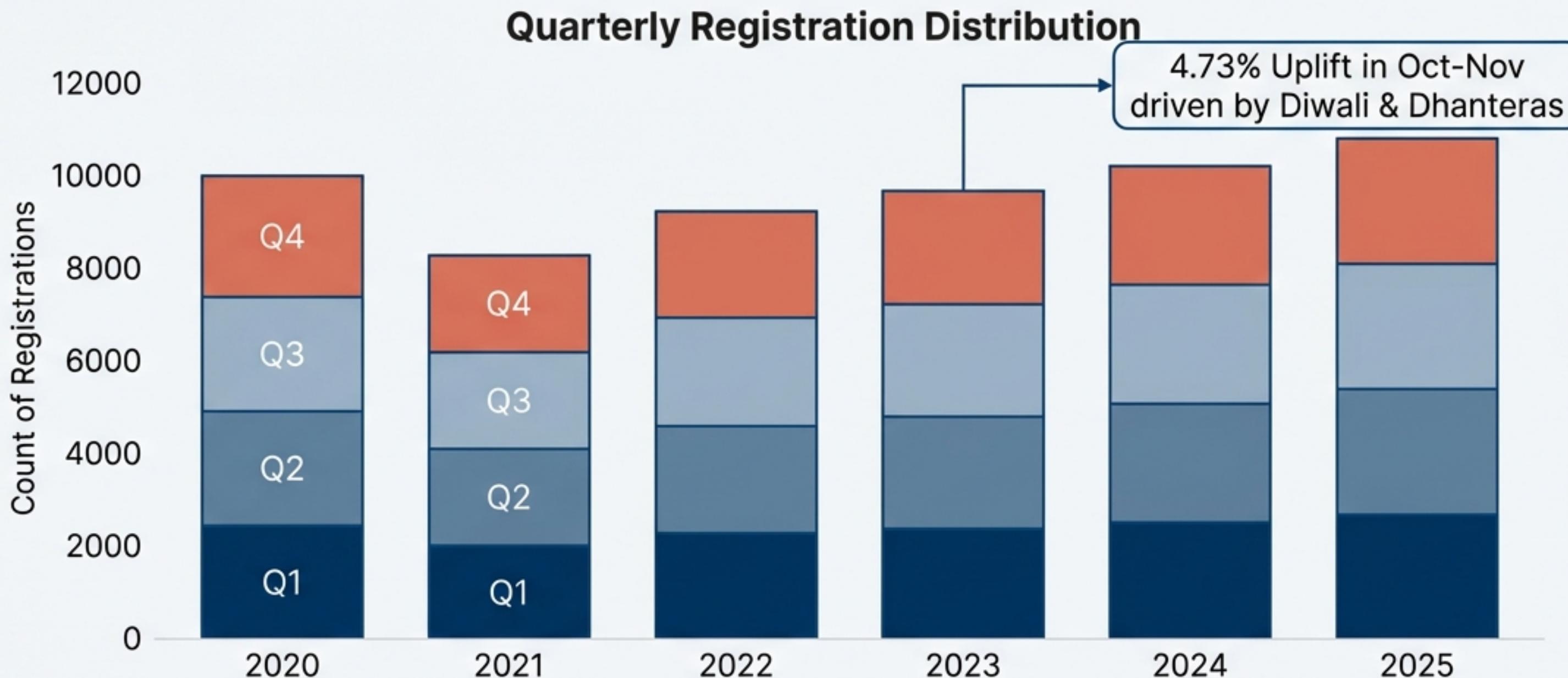
Dataset Dimensions

- **Geographic:** 35 States & Union Territories
- **Market Depth:** 1,244 Unique Manufacturers
- **Tech Width:** 21 Fuel Types & 16 Vehicle Categories
- **Confidence:** $p < 0.05$ Statistical Significance Confirmed

Market Dynamics: The V-Shaped Recovery



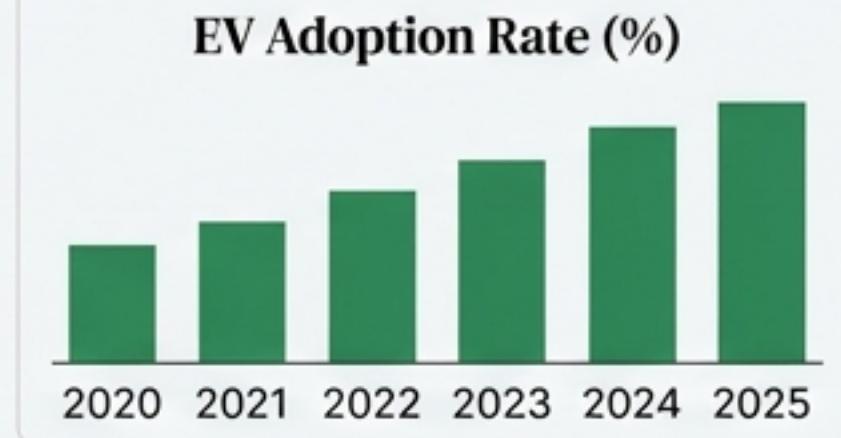
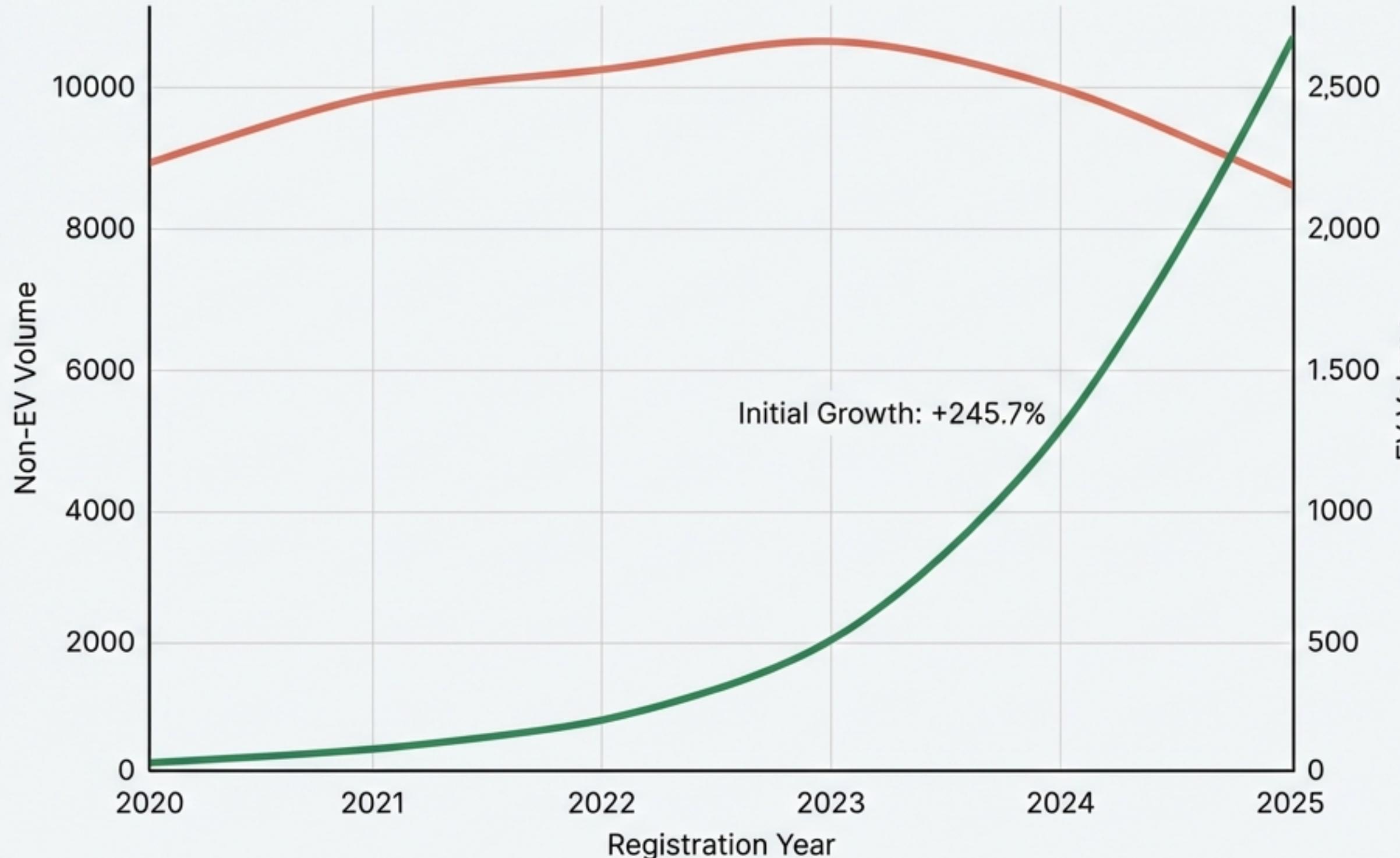
The ‘Festive Uplift’ Phenomenon



Strategic Implication Box:

Inventory Strategy: Dealerships and OEMs must increase stock levels by 5–10% starting in September to fully capitalise on the Q4 demand surge.

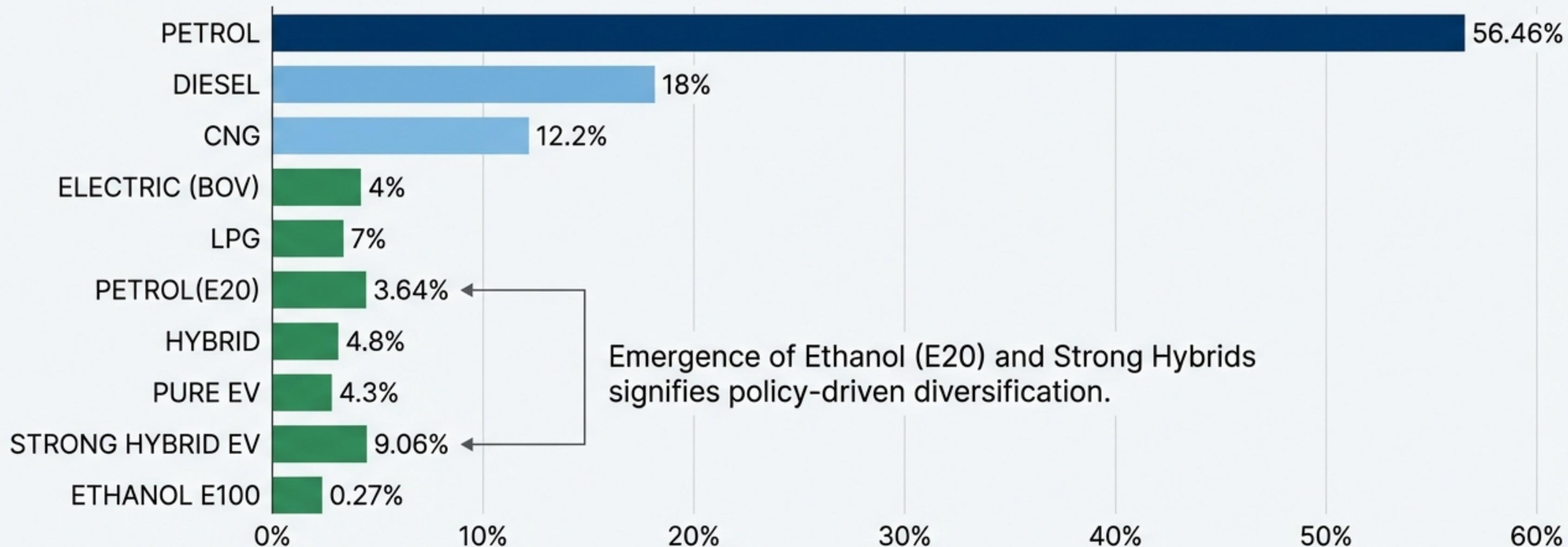
The Electrification Surge: Exponential Trajectory



Strategic Implication Box
The 'Hype Cycle' is over; the 'Volume Cycle' has begun. 2024 saw a 32.8% volume increase in EVs, signalling sustained consumer acceptance beyond early adopters.

Beyond Petrol: A Multi-Fuel Future

Top 10 Fuel Types



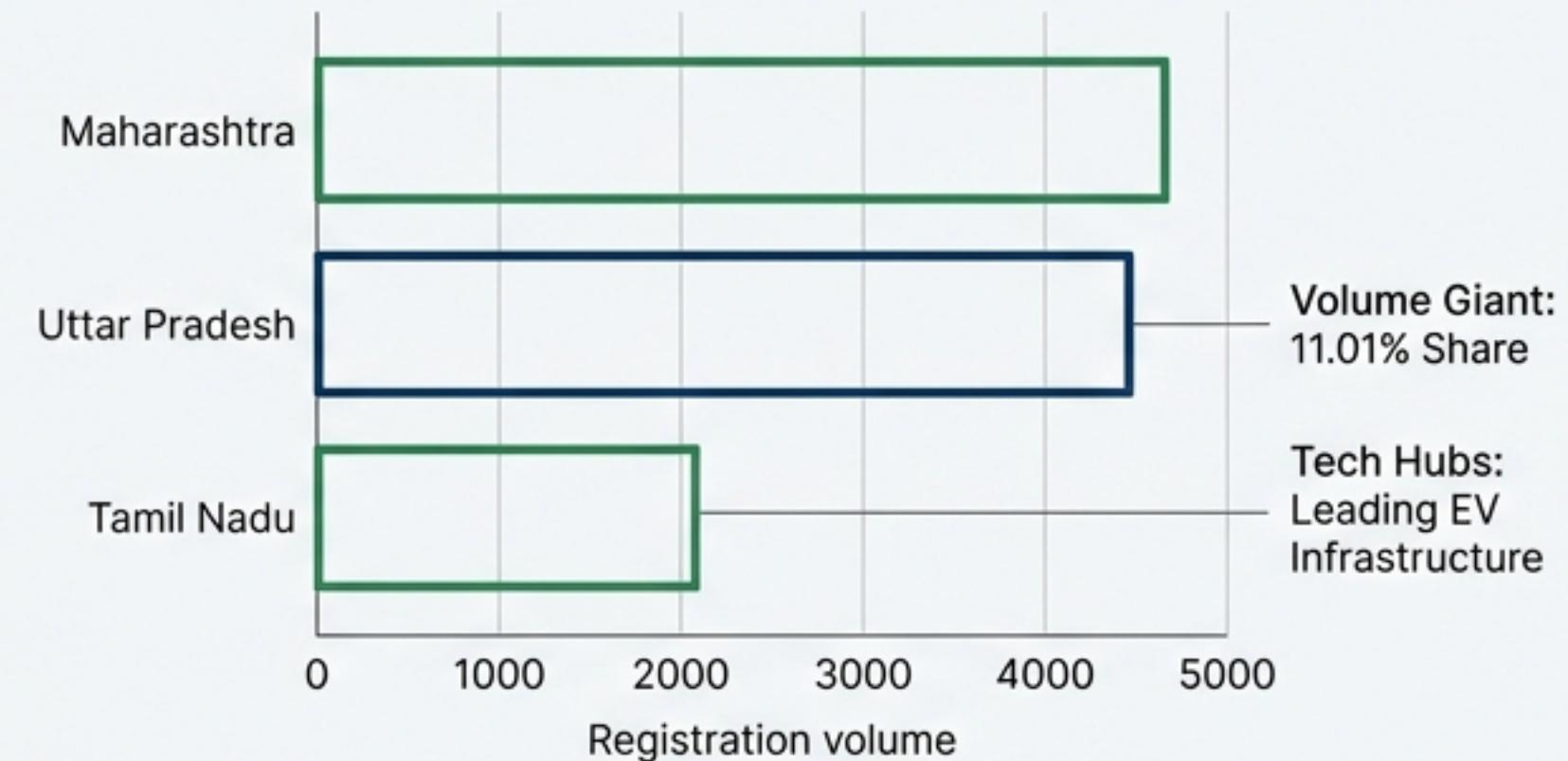
Strategic Implication Box:

Risk Note: The emergence of E20 fuel suggests policy-driven shifts. Supply chains must be E20-ready to avoid obsolescence as ethanol blending mandates increase.

The Geography of Demand: Volume vs. Innovation



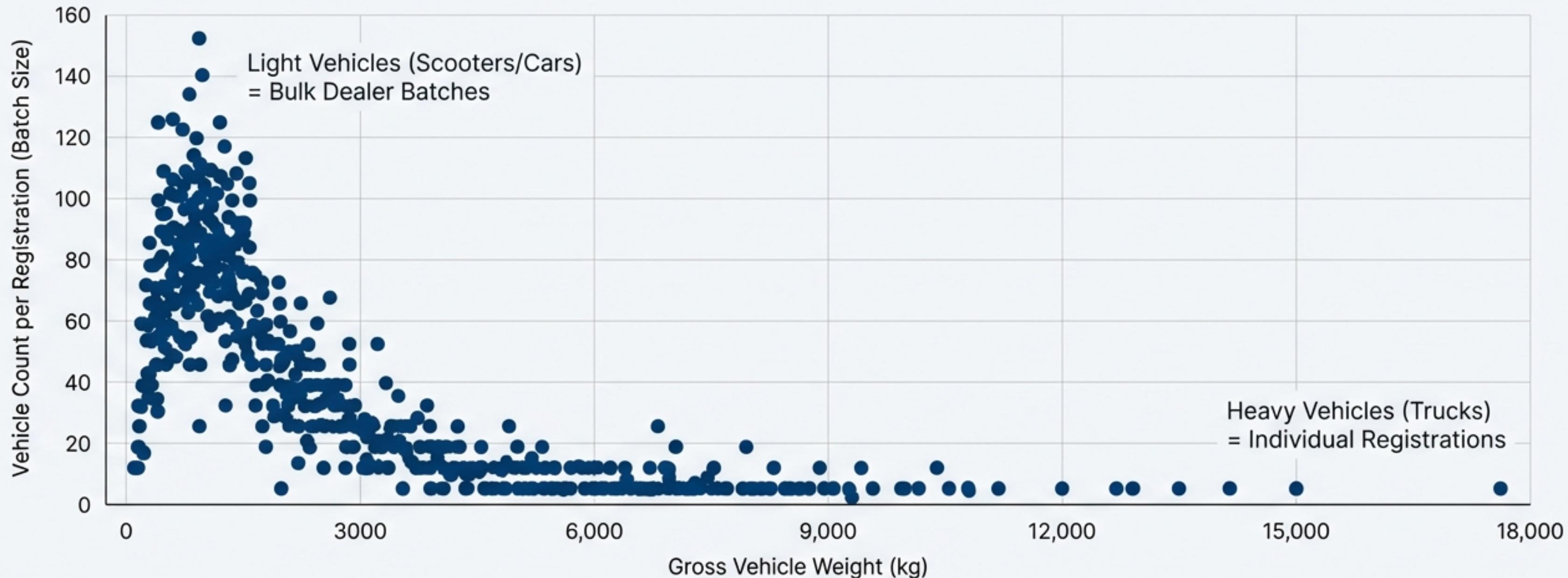
Top States by Volume



Strategic Implication Box

Dual Strategy Required: Focus on Uttar Pradesh for mass-market ICE volume, but prioritise Tamil Nadu and Maharashtra for EV infrastructure and premium product launches.

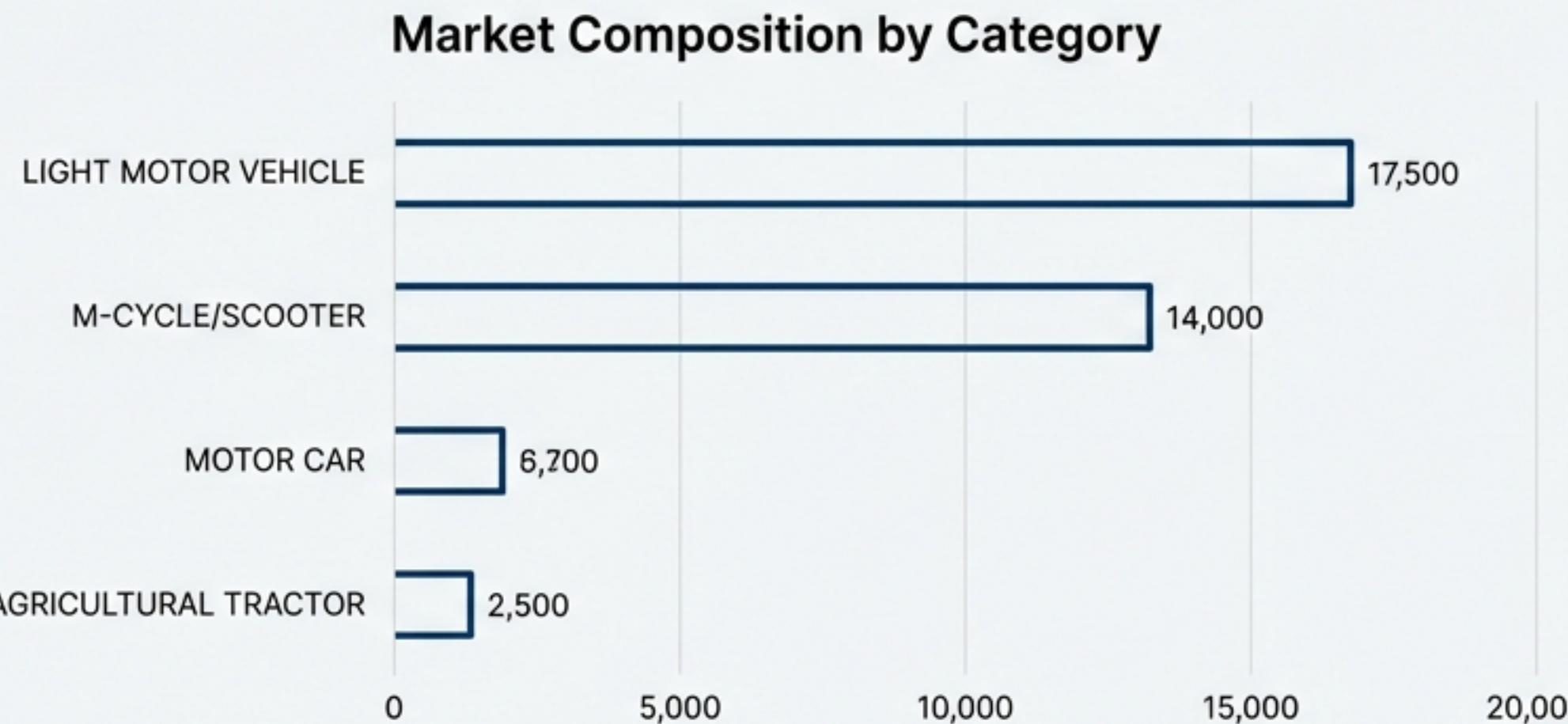
Operational Nuance: The Weight-Volume Trade-off



Strategic Implication Box:

Operational Efficiency: Urban RTOs dealing with Light Motor Vehicles must optimise for digital batch processing, while industrial hub RTOs need resources for individual heavy-vehicle inspections.

Segment Dominance & Manufacturer Leaders



Two-Wheeler Leader:

Hero MotoCorp (11.94% Share)

Four-Wheeler Leader:

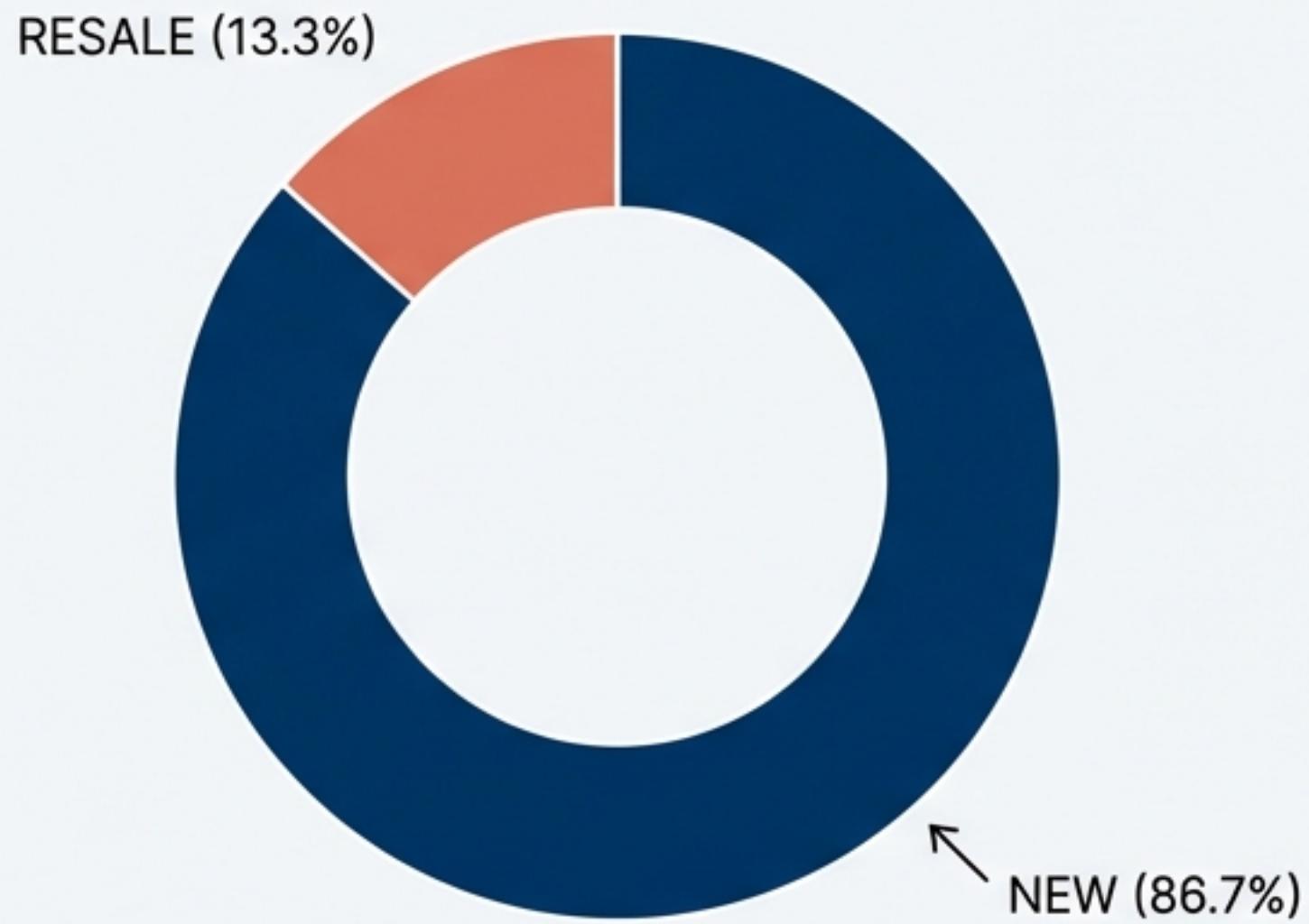
Maruti Suzuki (11.01% Share)

Strategic Implication Box

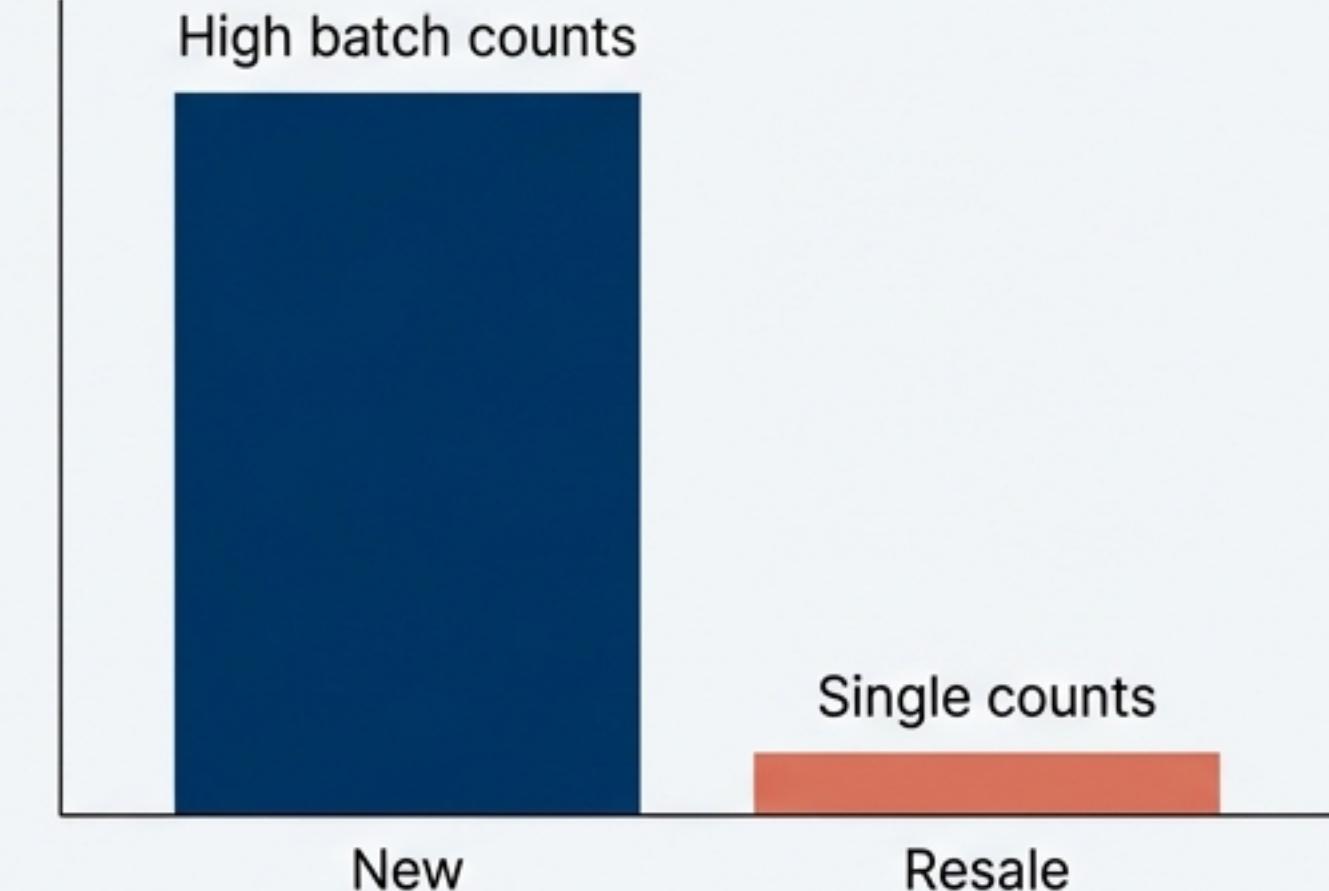
Personal Mobility Rules:

The market is overwhelmingly driven by personal transport (bikes and cars) rather than commercial fleets, dictating a B2C-heavy marketing approach.

The Ownership Lifecycle: A Market Hungry for ‘New’

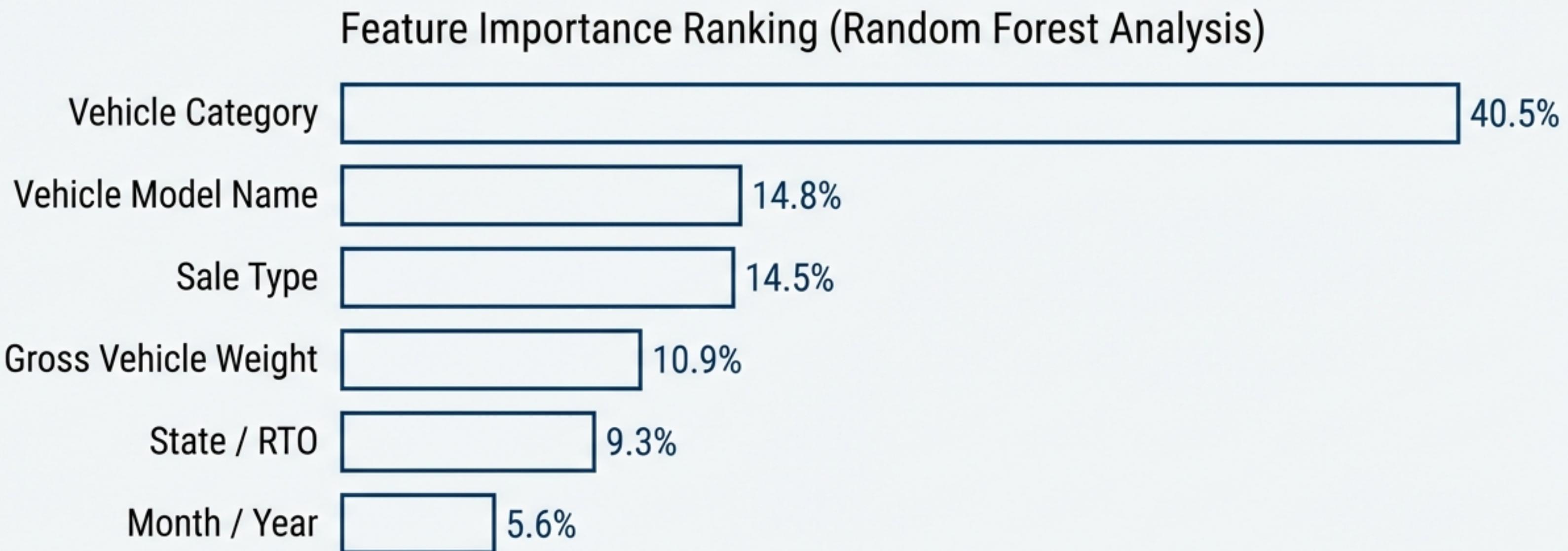


Batch Size Distribution



Strategic Implication Box: Financial Risk: With the market heavily skewed toward new vehicles, a sudden drop in ICE resale values (due to EV policies) could expose lenders to significant collateral risk.

Predictive Drivers: What Moves the Needle?



Strategic Implication Box

Forecasting Key: To predict RT0 workload or sales volume, look at the **product launch pipeline** (Categories/Models) rather than just macroeconomic dates.

Strategic Recommendations



Commercial (OEMs & Dealers)

Capitalise on the **4.73% Festive Uplift**. Ramp inventory **+10% in September**. Focus sales on 'Light Motor Vehicle' models to drive batch volume. volume.



Geographic (Investors)

Target the UP-TN Axis. Prioritise **Uttar Pradesh** for mass-volume ICE expansion and **Tamil Nadu** for **EV infrastructure investment**.



Financial (Lenders)

De-risk ICE resale portfolios. As **EV penetration crosses 15%** in tech-forward states, prepare for **downward pressure on ICE residual values**.

Outlook 2025: Resilience, Transition, and Maturity



Success in 2025 belongs to those who master the dual-speed market: Volume in the North (UP), Innovation in the South (TN).