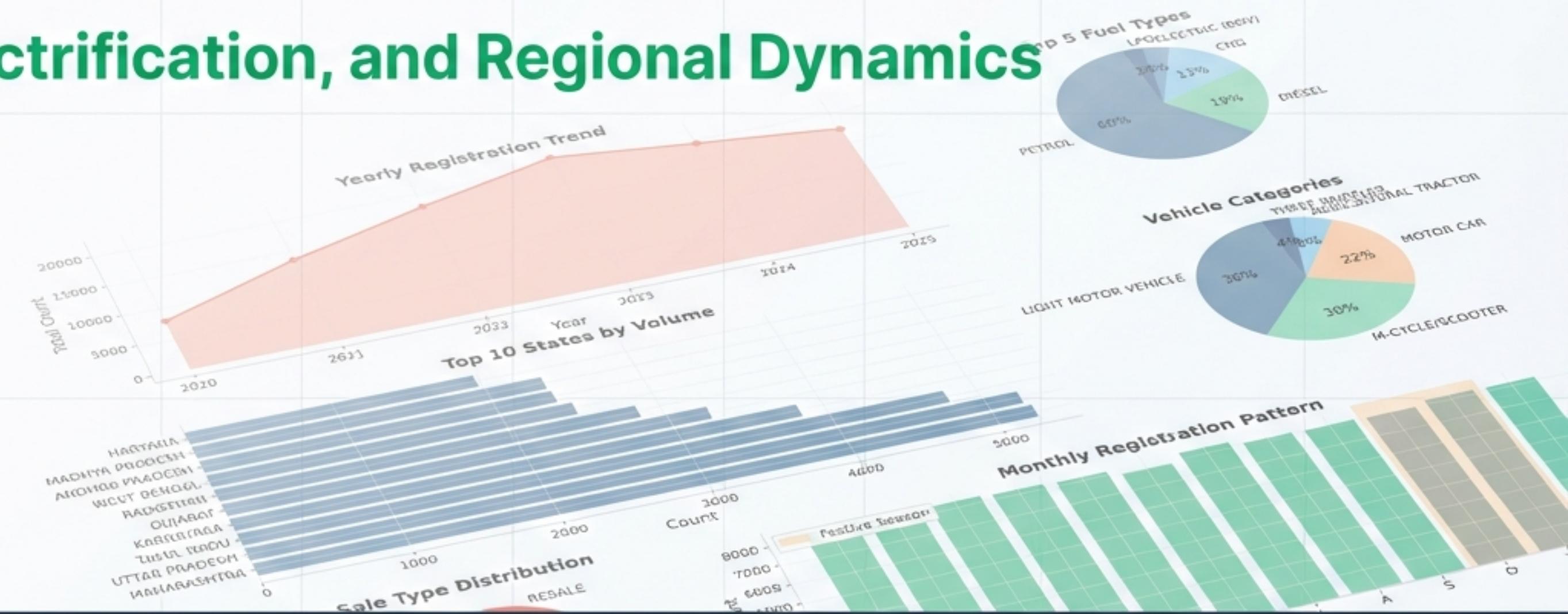


Indian Automotive Market Analysis

2020 – 2025

Resilience, Electrification, and Regional Dynamics



Dataset: 500,000 Vehicle Registration Records

Coverage: 35 States & UTs

Report Date: January 2026

Executive Summary: A Market in Transformation

Market Health



V-Shaped Recovery

71.3% Growth

(in 2021)

Post-pandemic surge followed by a "mature growth phase" of stabilization (1.3–1.6% YoY) by 2023.

Green Mobility



The EV Pivot

>245% Growth

(Initial EV rate)

Explosive adoption of Electric Vehicles. 2024 sustained momentum with a 32.8% increase despite a larger base.

Key Drivers



The Pulse

4.73% Uplift

(Festive Season)

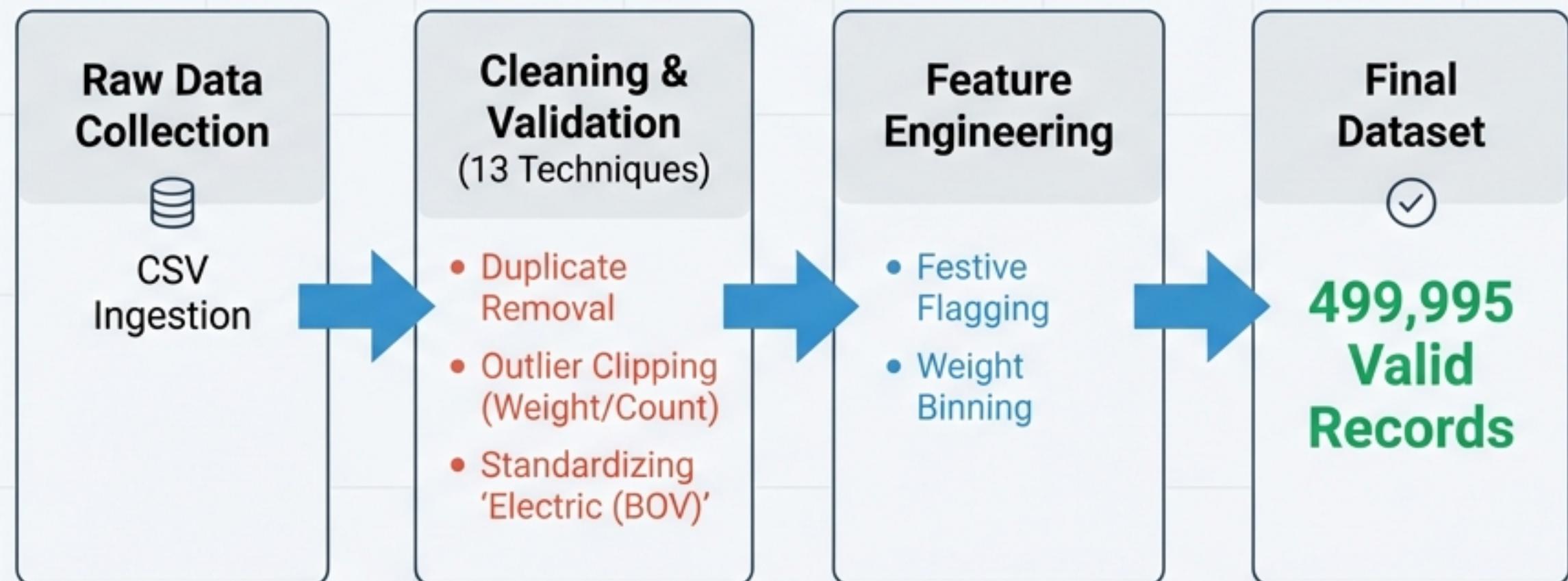
Seasonality is King. Oct-Nov drives volume. UP and TN control >20% of the national market.

Data Foundation & Methodology

The Dataset

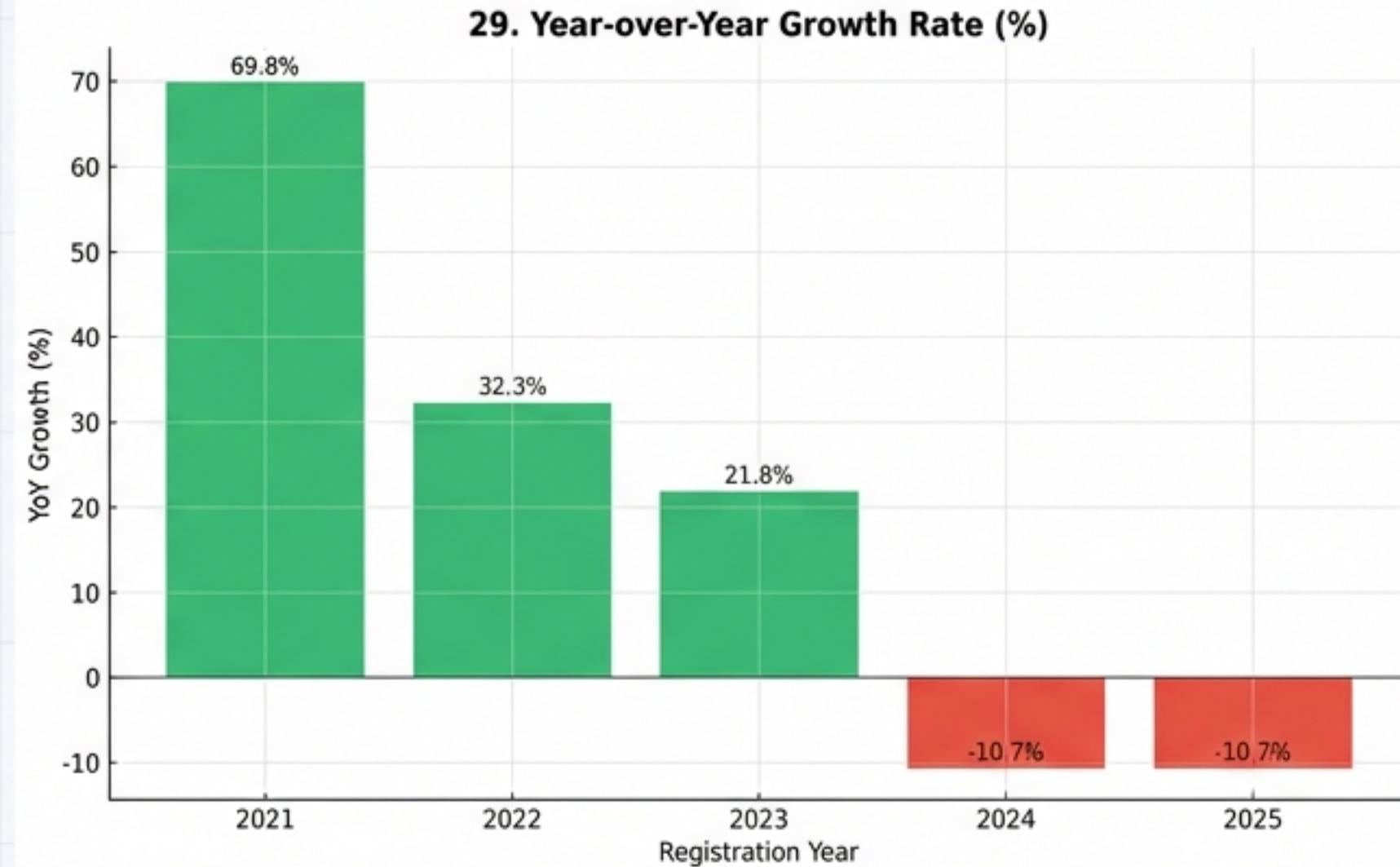
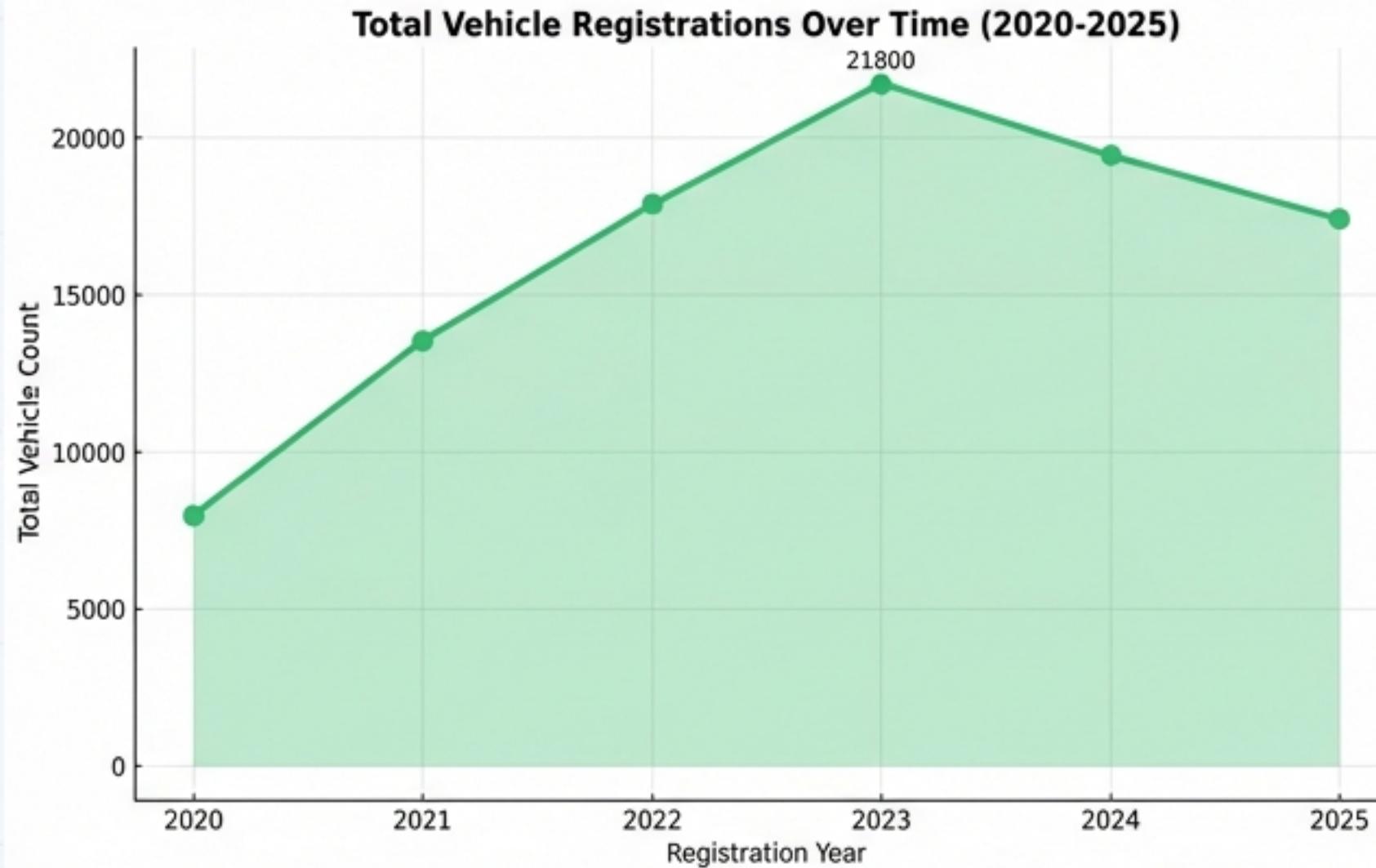
- Volume:** 500,000 raw registration records
- Scope:** 1,244 unique manufacturers across 35 regions
- Period:** Jan 2020 – Oct 2025
- Granularity:** 15 attributes including fuel type, GVW, and pollution norms.

The Quality Pipeline



The V-Shaped Recovery

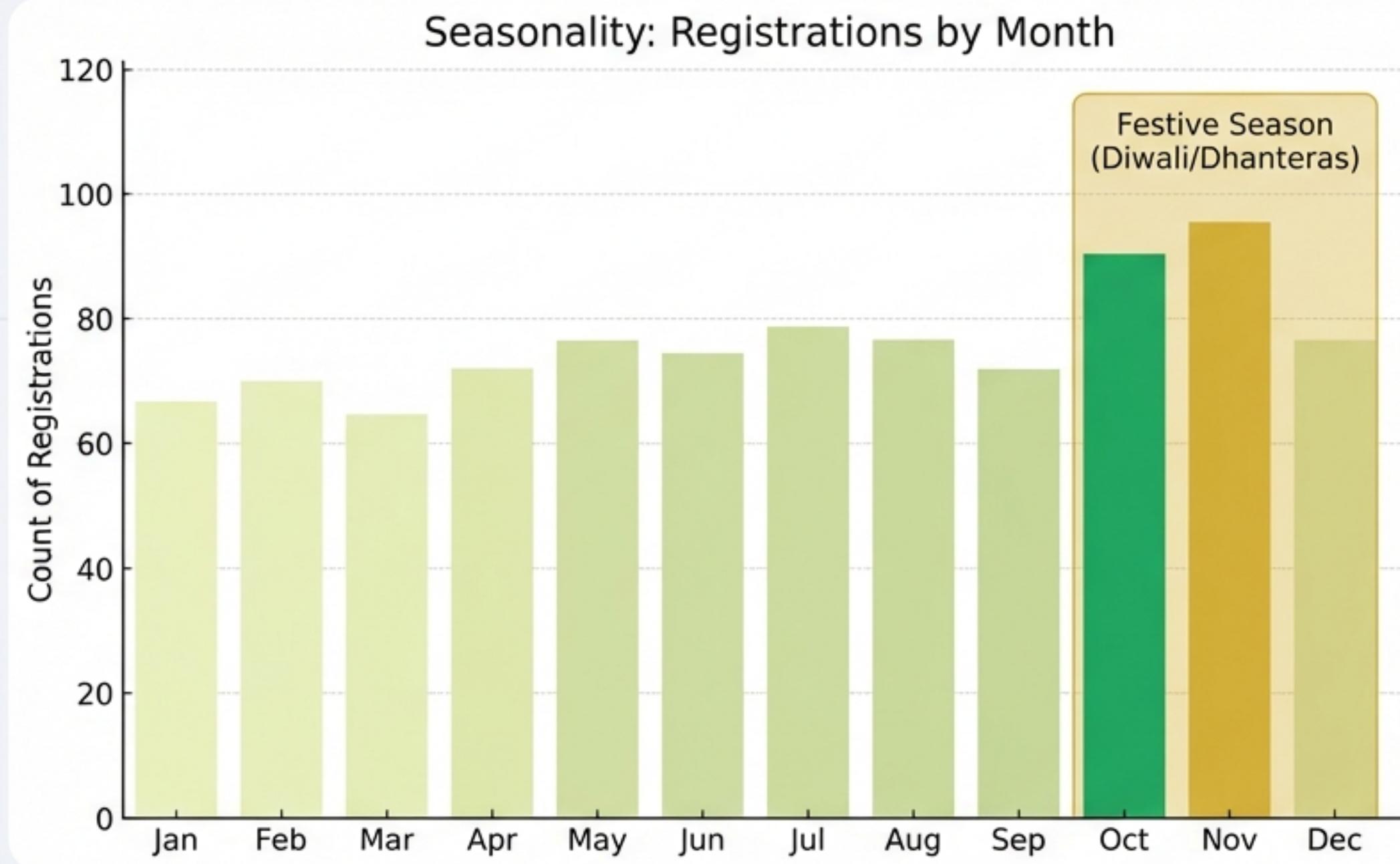
From pandemic lows to mature stabilization.



The Surge: 71.3% growth in 2021 marks the post-COVID bounce back.

The New Normal: The market has exited volatility and entered a "compliance-driven" steady state, contracting slightly to sustainable levels in 2024-25.

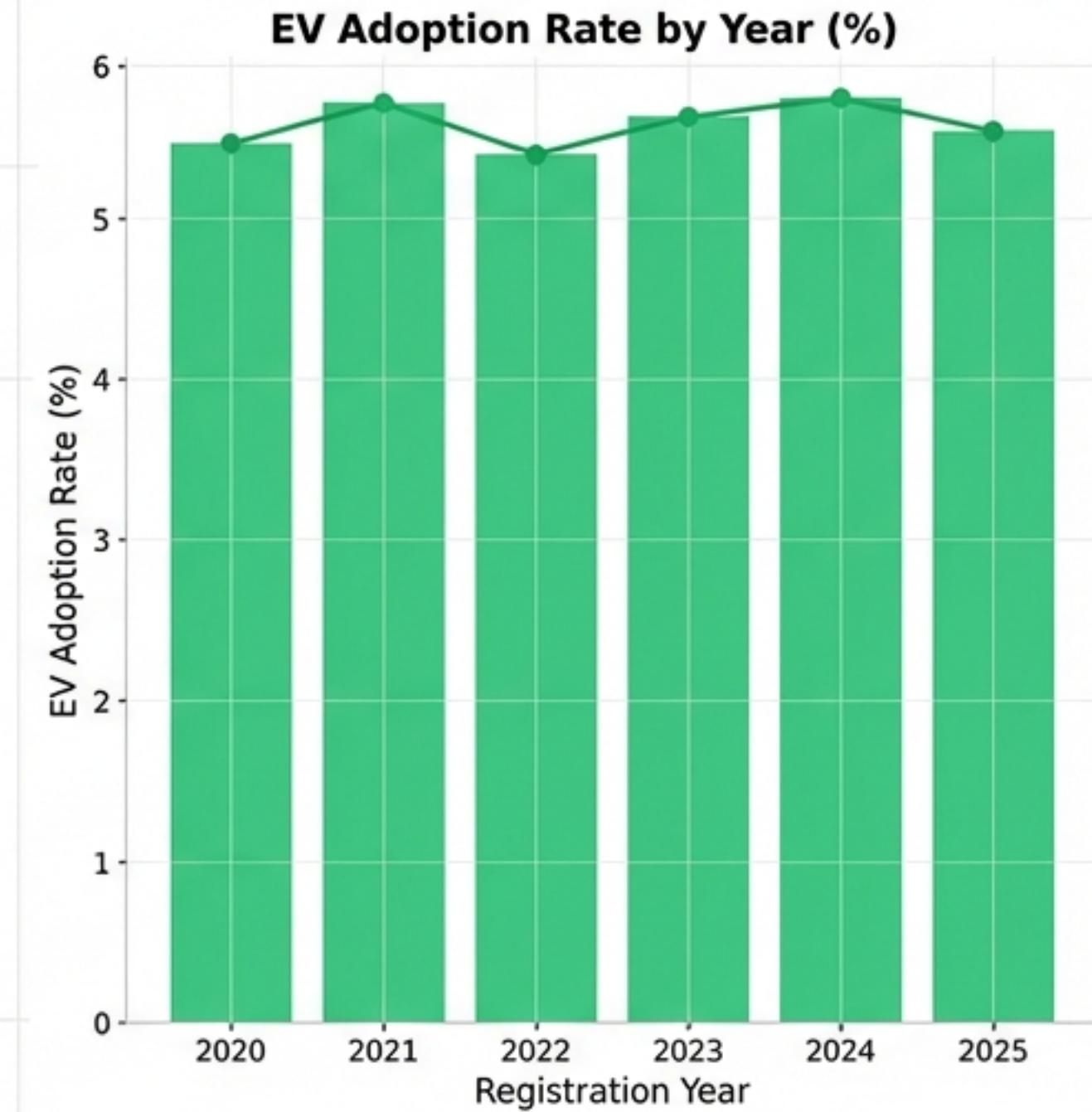
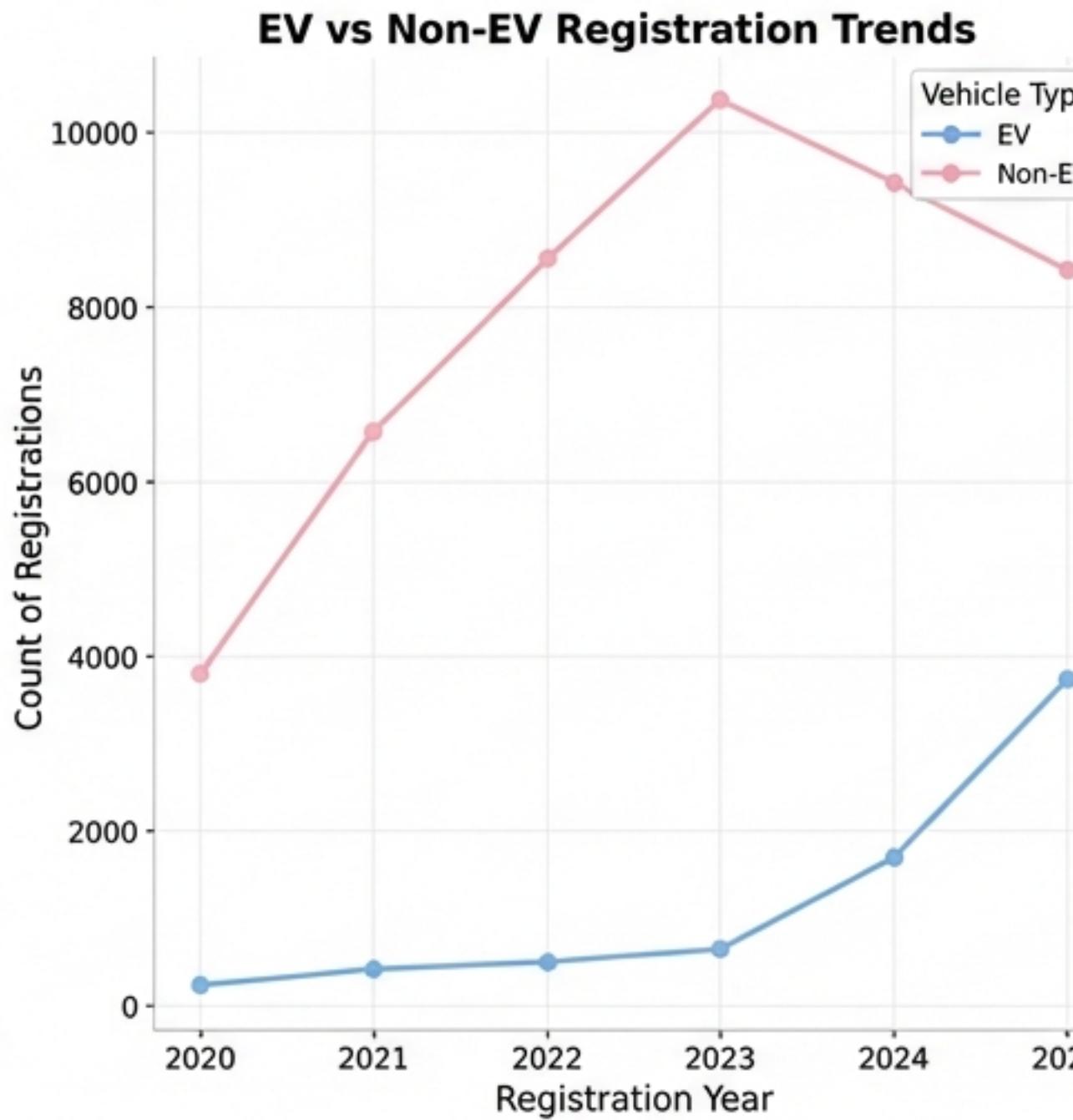
The 'Festive Uplift' Phenomenon



- **4.73% Uplift** in average vehicle registrations during Oct-Nov.
- **Strategic Implication:** Inventory stocking must peak in September to capture this predictable demand surge.

The Electric Explosion

Contrasting steady market growth with exponential EV adoption.

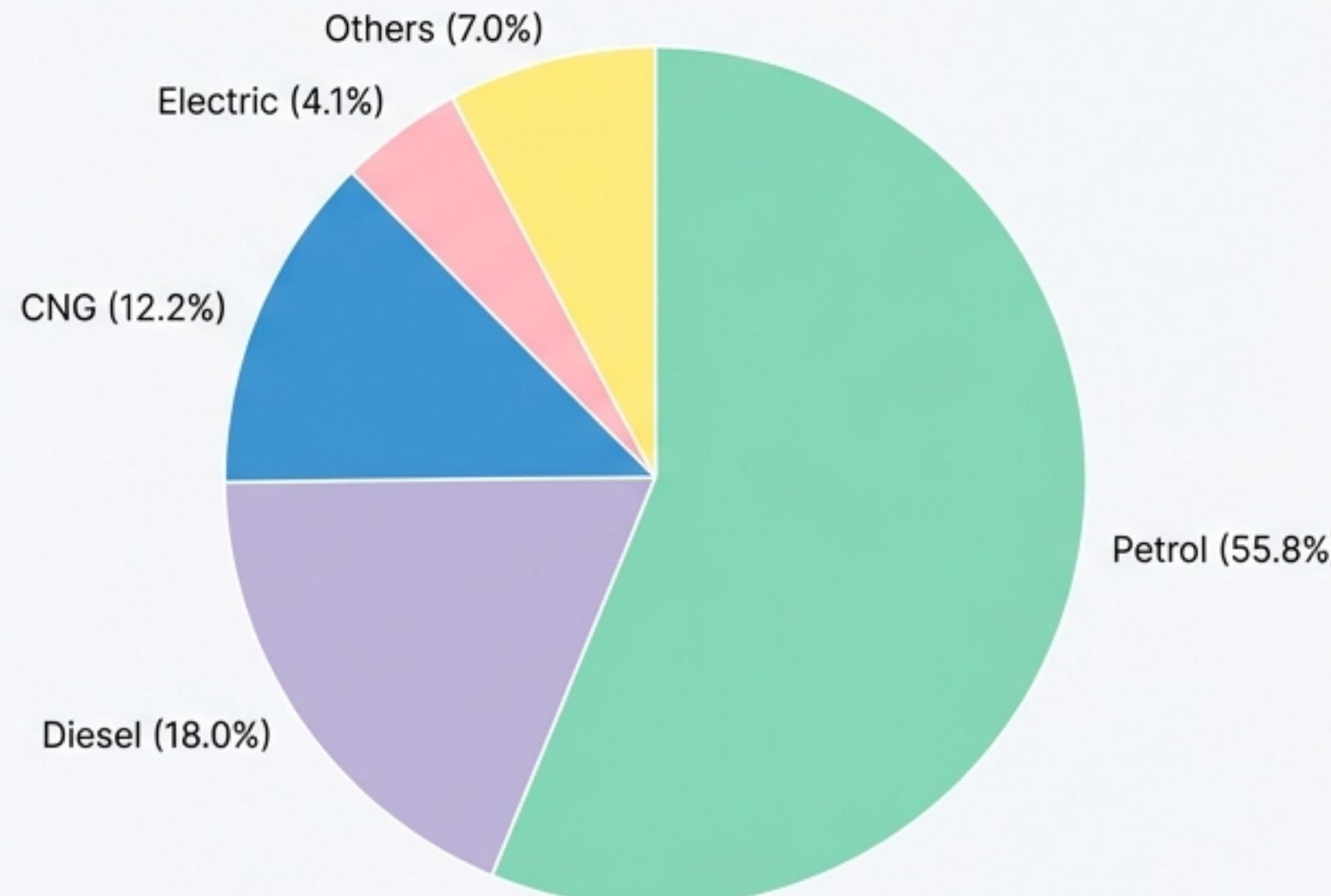


Key Statistics

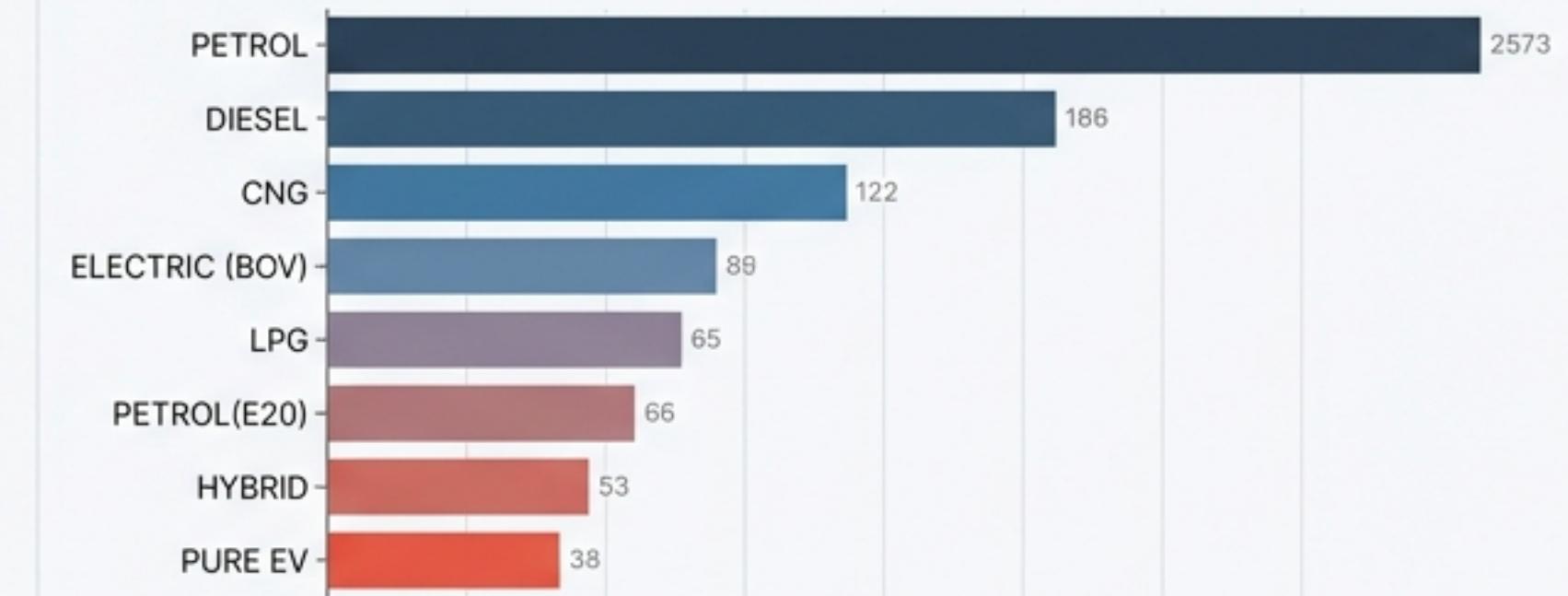
- **2021 Growth:** +245.7% (EV Volumes)
- **2022 Growth:** +132.9%
- **Current State:** Sustained momentum with +32.8% growth in 2024.

Fuel Mix Transformation

Fuel Type Market Share



Top 10 Fuel Types



Diversification

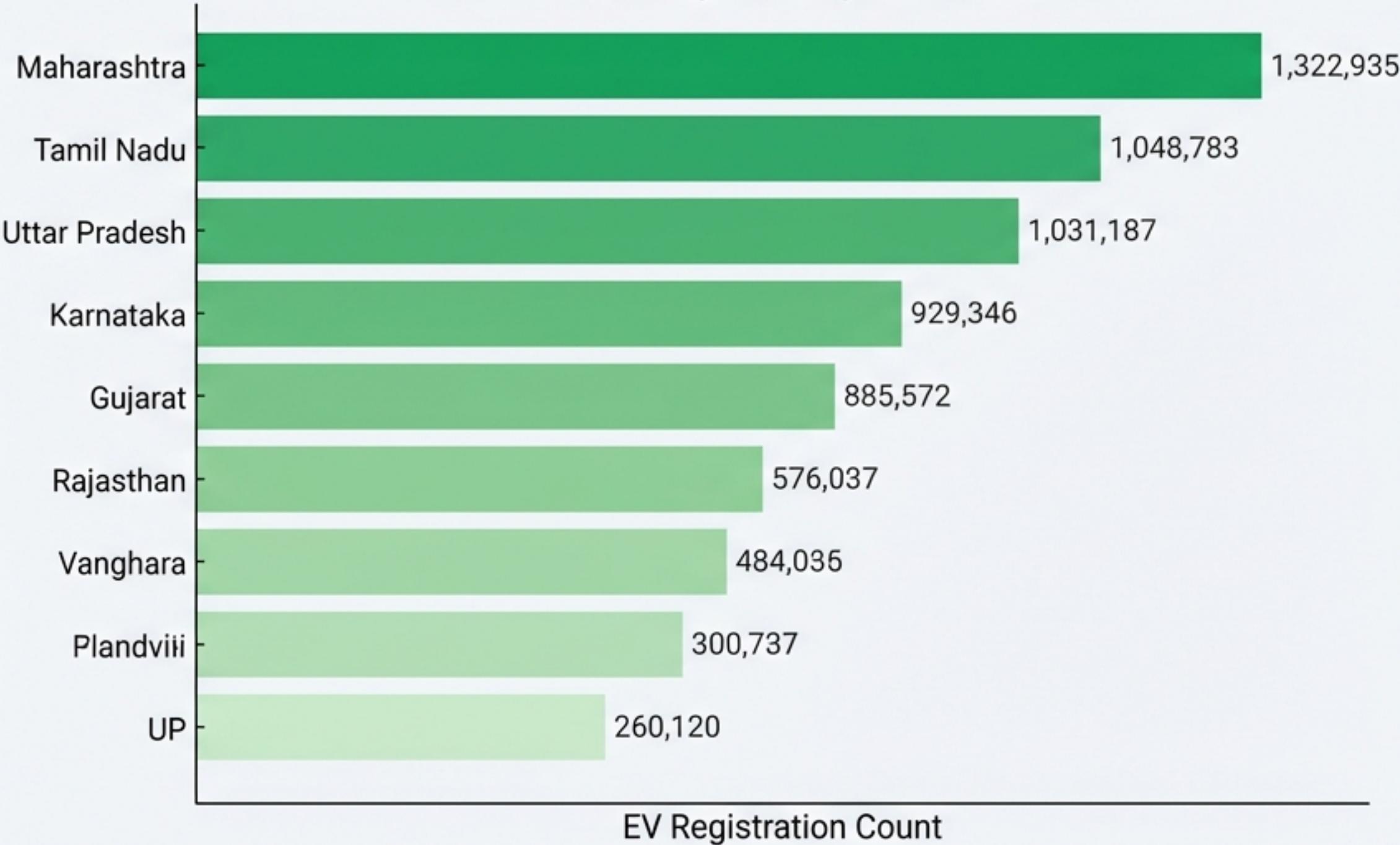
The dataset records 21 unique fuel types.

Emerging Tech

Significant presence of Ethanol (E20) and Strong Hybrids indicating a shift from mono-fuel dependence.

Leaders in EV Adoption

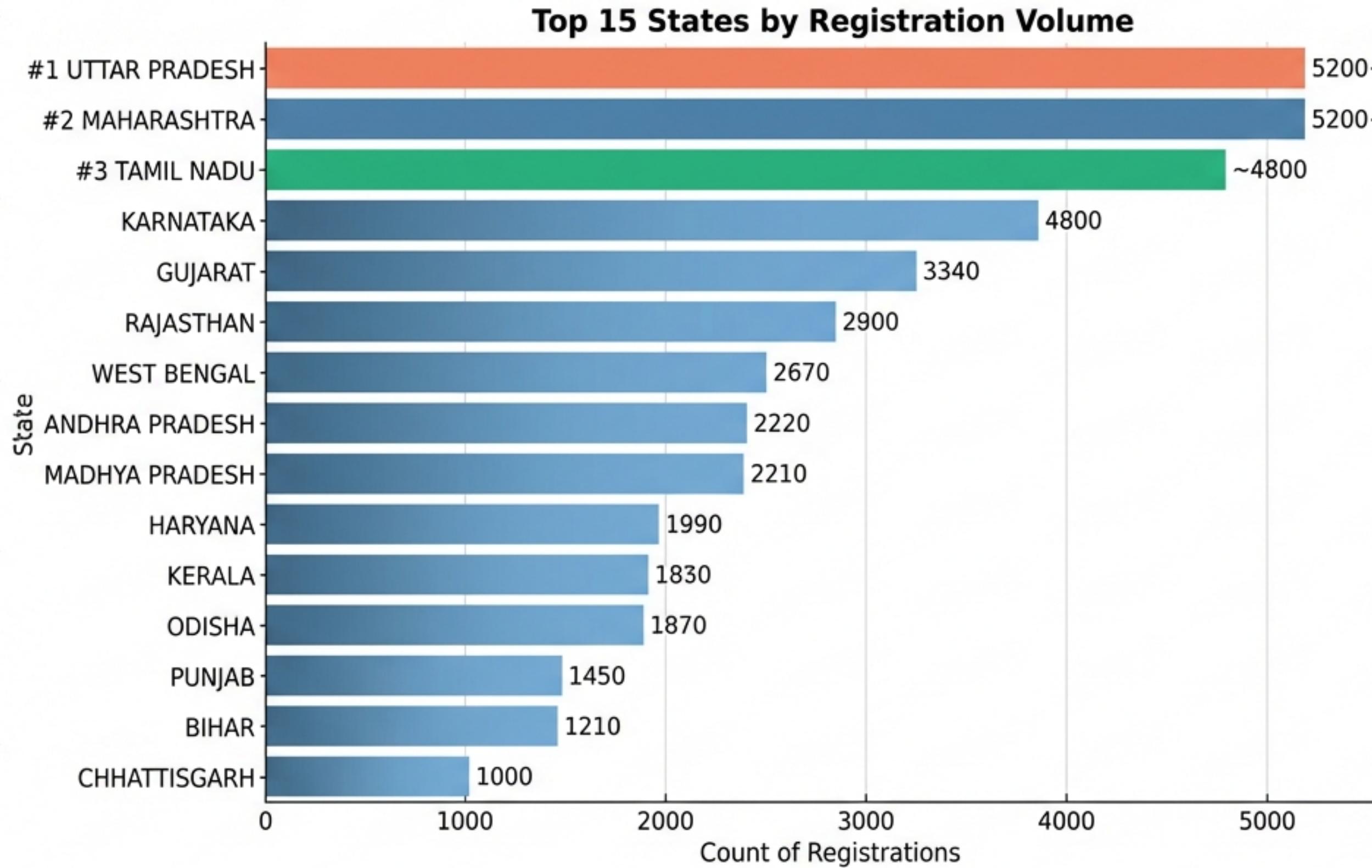
Top 10 States by EV Registration Count



The Green Corridor:
Maharashtra, Tamil Nadu, and UP are the clear front-runners.

Action: Charging infrastructure investment should be prioritized in these three states to support the highest density of EV users.

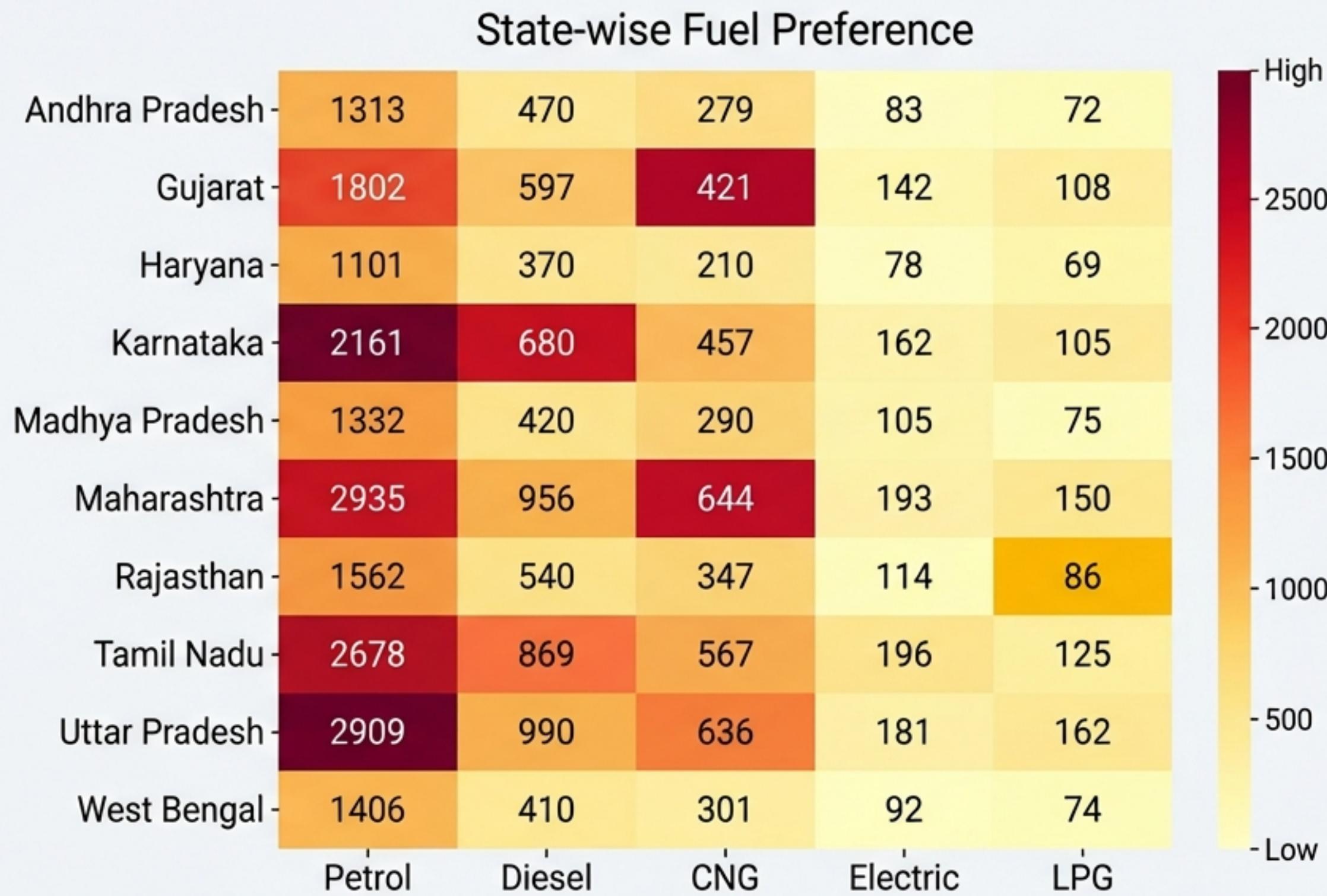
Regional Powerhouses



***Twin Engines*:**
Uttar Pradesh
(11.01% Share) and
Tamil Nadu drive the
national market.

Observation:
Demand is
concentrated in
industrial corridors
(Pune,
Sriperumbudur) and
high-population
density zones.

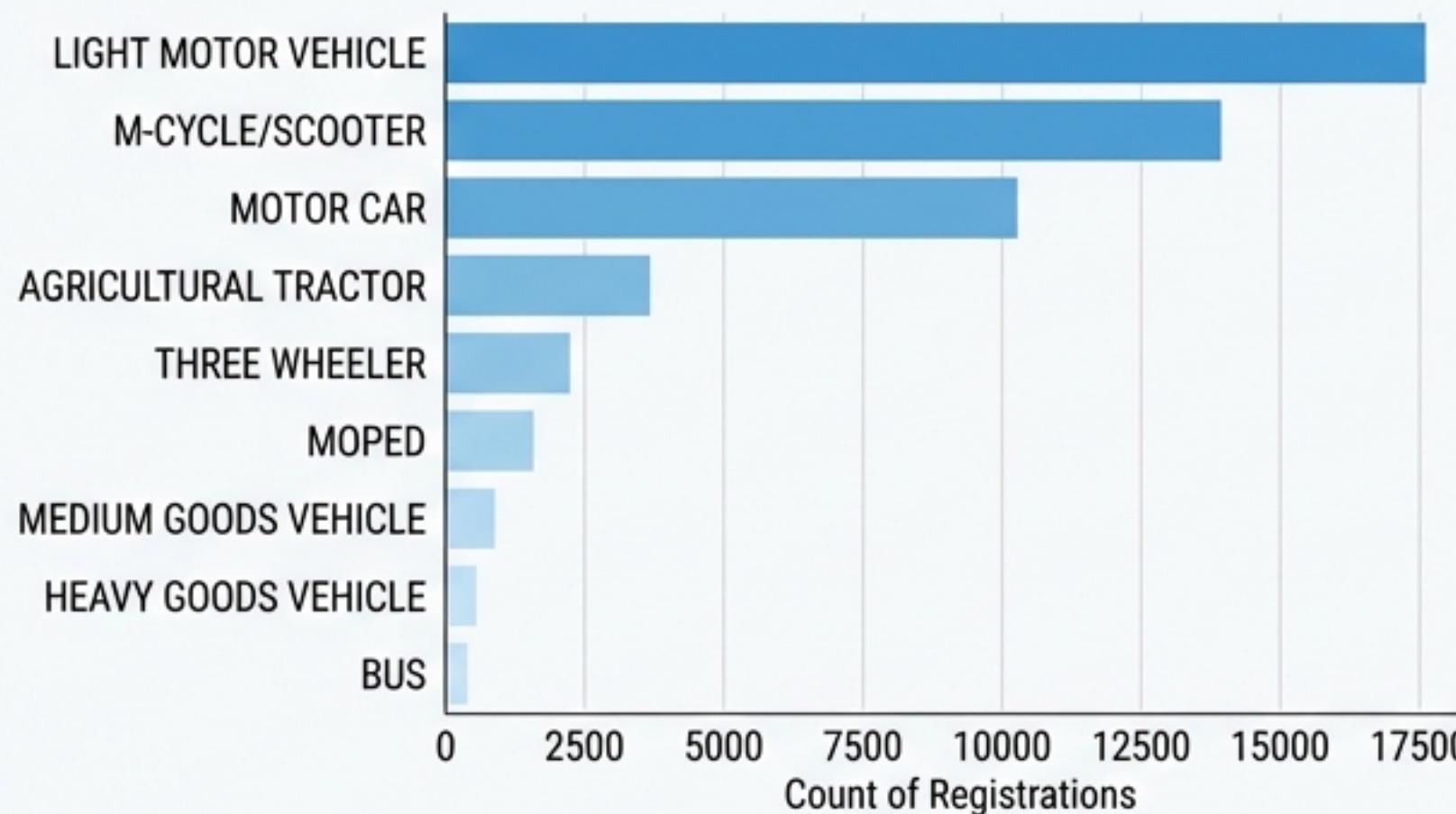
State-wise Fuel Preferences



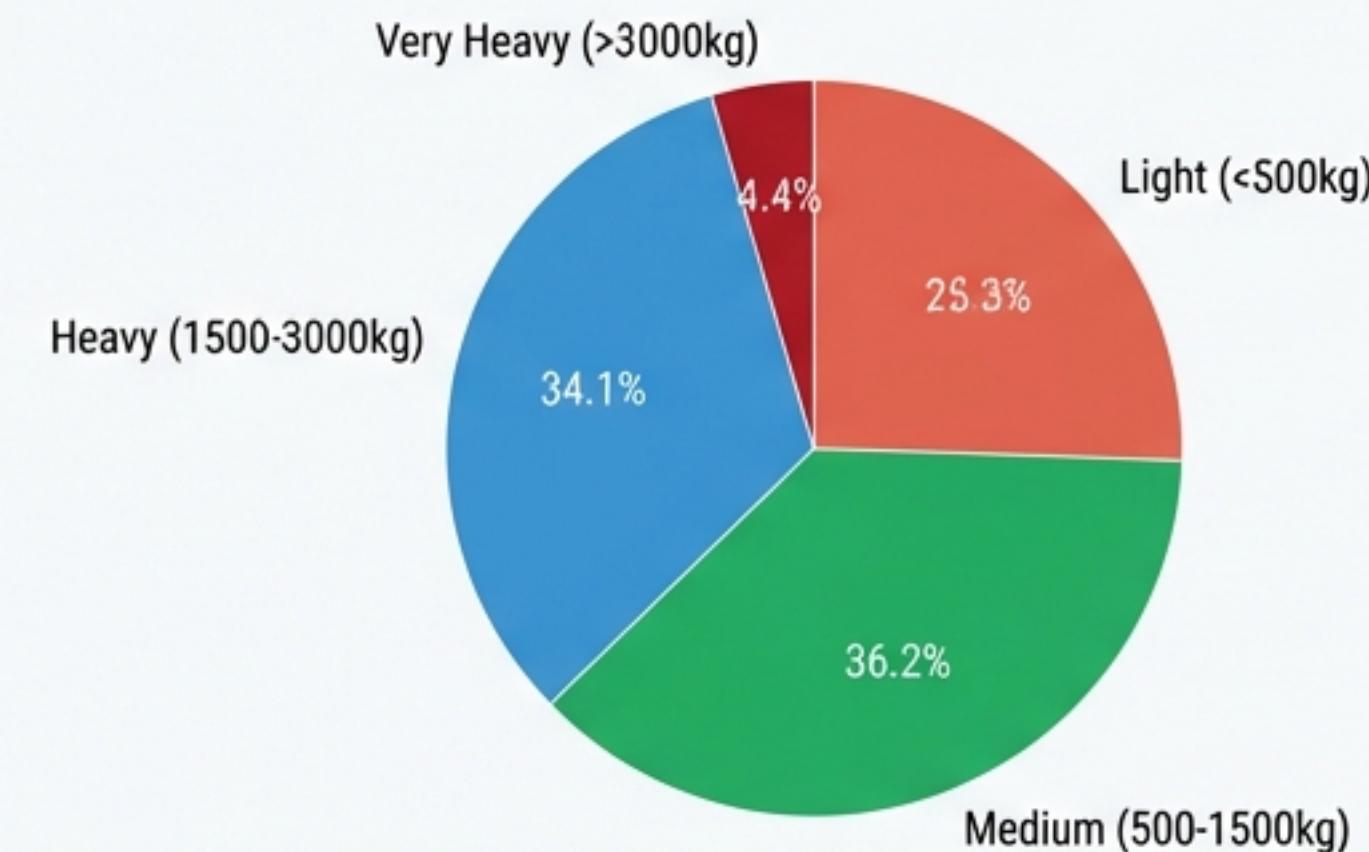
Takeaway
Regional nuances dictate inventory. A 'one-size-fits-all' strategy fails because CNG infrastructure exists only in specific states (Gujarat/MH), while Southern states show higher Diesel affinity.

Vehicle Category Dominance

Distribution of Vehicle Categories



Vehicle Distribution by Weight Category



Personal Mobility Rules

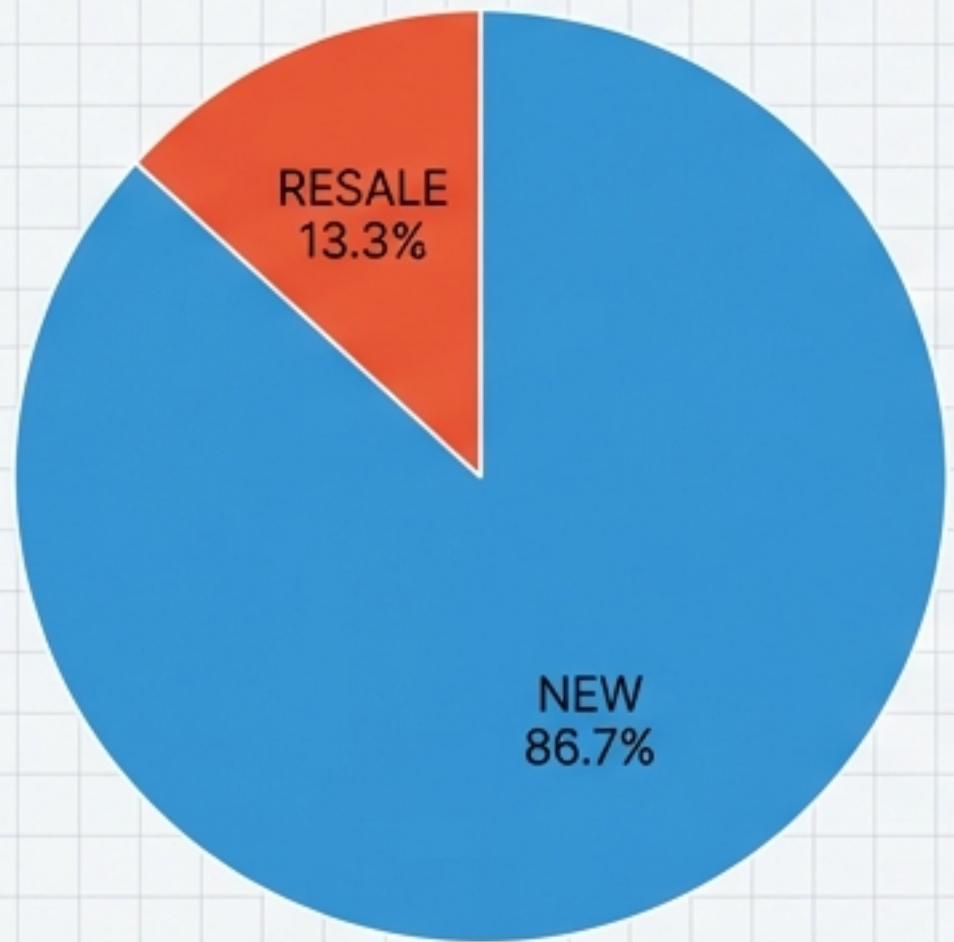
The market is driven by Light Motor Vehicles (LMV) and Two-Wheelers.

Structure

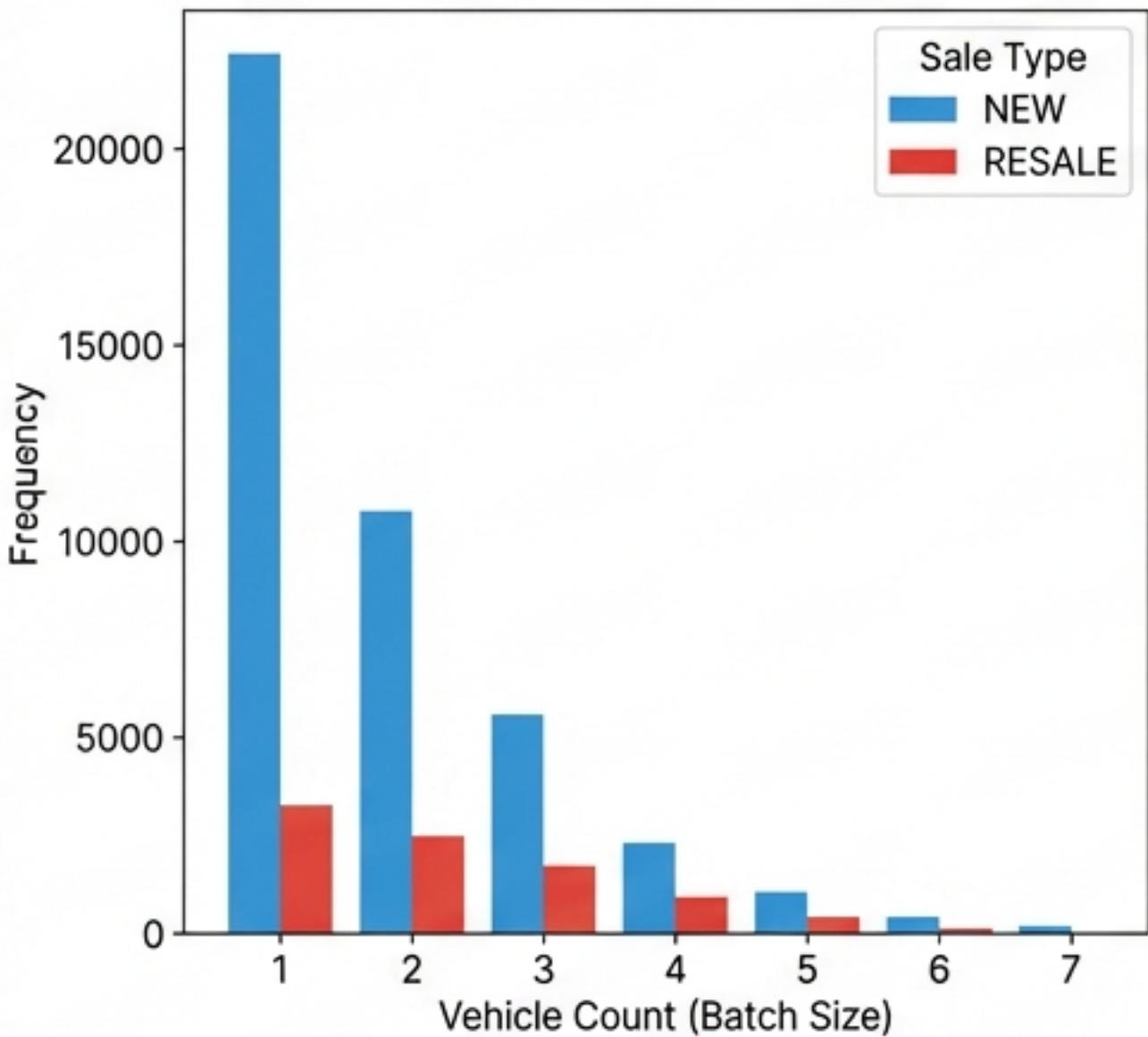
61.5% of vehicles weigh under 1500kg, confirming the focus on last-mile connectivity and personal transport.

Purchasing Patterns: New vs. Resale

Share of New vs Resale Vehicles



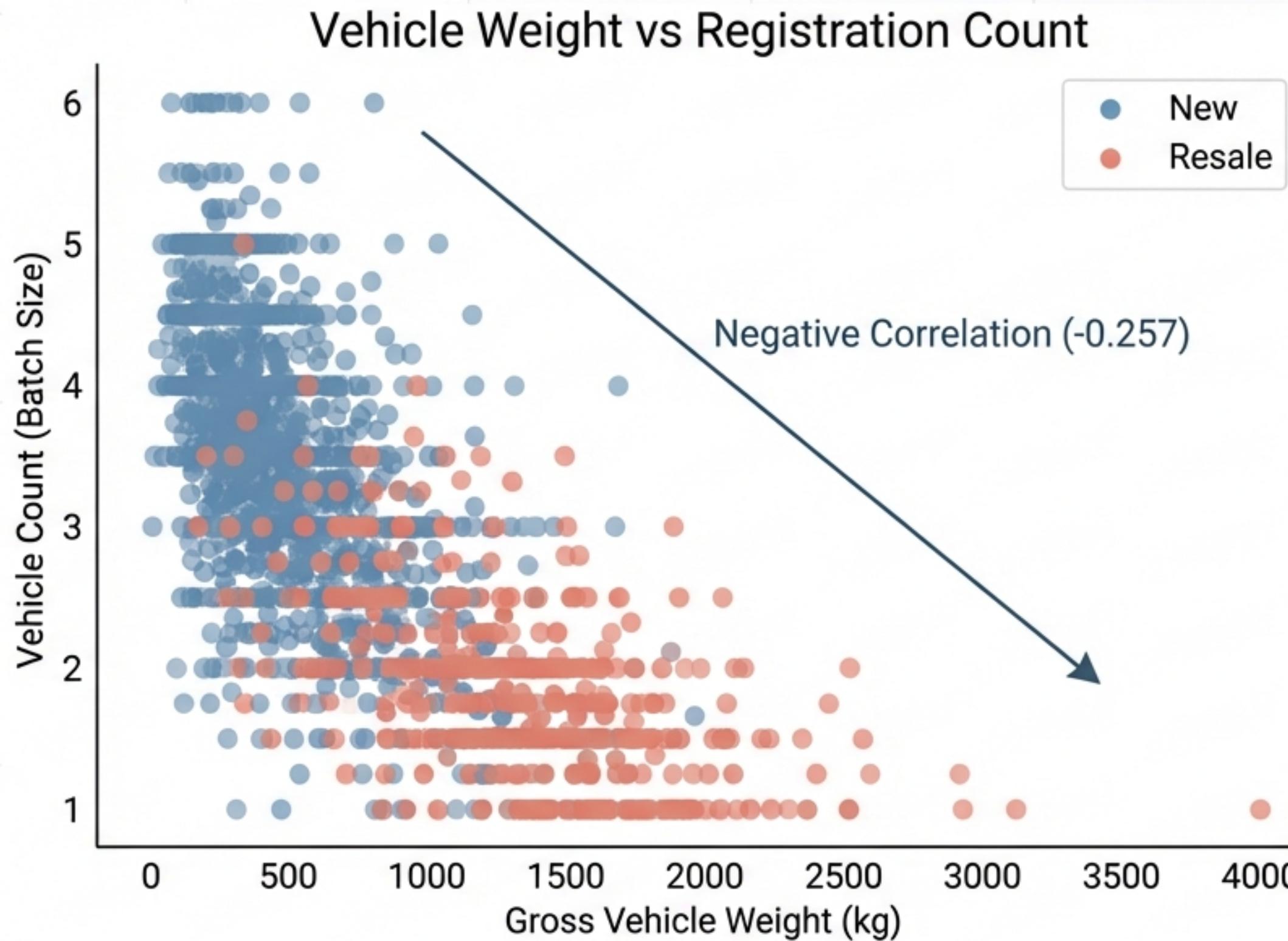
Vehicle Count Distribution: New vs Resale



Insights

- **First-Hand Market:** India remains a New Vehicle market (87%).
- **Strategic Risk:** The 13% Resale market faces valuation risks if ICE residual values drop due to aggressive EV policies.

Operational Intelligence: The Weight-Volume Inverse



Actionable Insight

- ✓ **Heavy Vehicles (>3000kg):** Registered individually (High Value assets).
- ✓ **Light Vehicles (<500kg):** Batch processed (Dealer bulk registrations).

Recommendation: RTOs need distinct processing lanes for 'Batch-Personal' vs 'Single-Commercial' applications.

Strategic Recommendations

1 Inventory Optimization



Action

Stock +10% in September

Reason

To capture the confirmed 4.73% festive uplift in Oct-Nov (Diwali/Dhanteras).

2 Expansion Focus



Action

Target UP-TN Corridor

Reason

Uttar Pradesh and Tamil Nadu control 20%+ of volume. Highest ROI for marketing spend.

3 Policy & Infrastructure



Action

Prioritize Green Heavy Transport

Reason

EV growth is explosive (>130%) in 2-wheelers, but heavy goods vehicles lag. Policy incentives needed here.

Conclusion: The Era of Stabilization & Compliance



The Indian automotive market has successfully transitioned from post-pandemic volatility to a mature, compliance-driven ecosystem. The future is defined by the '**Two-Wheeler EV**' segment and the industrial might of the **UP-TN corridor**.