

MOBILITY

BULLETIN

- Truck rentals remained firm during June, on back of demand from manufacturing sector
- Minor disruptions were witnessed in Maharashtra due to 'Chakka Jam' announced by truckers protesting e-challan and ad-hoc fines
- NCR truckers are bracing up for blanket entry ban of BS IV trucks from November 1
- Vehicle sales across categories were weak, barring tractors and construction equipment
- Fuel sales and toll collections were down MoM, but rose YoY in June



June 2025 underscored a positive shift in economic momentum across multiple transport and automotive verticals. Truck rentals saw healthy month-on-month growth, spurred by a revival in manufacturing activity. Export-driven freight movement shows continued resilience, setting a constructive tone for Q2. While fuel consumption and FASTag collections dipped slightly, their sharp year-on-year rise signals enduring structural recovery and seasonal mobility trends. However, passenger car sales continue to reel under subdued consumer sentiment, shaped by ongoing market uncertainty. Encouragingly, early monsoon onset and increased rural economic activity have strengthened tractor demand, with agriculture-linked mobility seeing renewed traction. Meanwhile, the electric vehicle segment is accelerating ahead of forecasts, powered by robust consumer interest and a wave of fresh model launches by leading automakers

— **Y S Chakravarti**, Managing Director and CEO, Shriram Finance

TRUCK RENTAL RATES (Round trip rentals for 18 ton pay load)

Truck Route	May-25	Jun-25	MoM%	Jun-24	YoY%
Delhi-Mumbai-Delhi	1,60,000	1,62,000	1.3%	1,55,000	5%
Delhi-Kolkata-Delhi	1,58,000	1,56,000	-1.3%	1,45,000	8%
Delhi-Hyderabad-Delhi	1,89,000	1,92,000	1.6%	1,76,000	9%
Delhi-Chennai-Delhi	2,05,000	2,08,000	1.5%	2,05,000	1%
Delhi-Bengaluru-Delhi	2,16,000	2,15,000	-0.5%	2,07,000	4%
Mumbai-Chennai-Mumbai	1,59,000	1,62,000	1.9%	1,45,000	12%
Mumbai-Kolkata-Mumbai	1,95,000	1,98,000	1.5%	1,91,000	4%
Bengaluru-Kolkata-Bengaluru	2,04,000	2,06,000	1.0%	1,98,000	4%
Bengaluru-Mumbai-Bengaluru	1,30,000	1,30,000	0.0%	1,20,000	8%
Guwahati-Mumbai-Guwahati	2,74,000	2,75,000	0.4%	2,65,000	4%
Kolkata-Guwahati-Kolkata	1,43,000	1,46,500	2.4%	1,28,000	14%

- Truck rentals show a strong growth in June 2025 due to increased hiring by private sector
- The HSBC India Composite PMI Output Index recorded fastest expansion rate in 14 months.

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VEHICLE (RETAIL) SALES

CATEGORY	MAY-25	JUN-25	MoM%	JUN-24	YoY%
Goods Carrier	59,376	52,871	-11%	53,958	-2%
e-Rickshaw with Cart	7,968	6,554	-18%	4,610	42%
Three Wheeler (Goods)	10,273	8,808	-14%	8,970	-2%
Tractor (Commercial)	5,279	5,531	5%	5,426	2%
Bus	7,491	6,842	-9%	6,085	12%
Construction Equipment Vehicle (Commercial)	751	840	12%	673	25%
Maxi Cab	2,015	1,703	-15%	2,038	-16%
Earth Moving Equipment	457	396	-13%	564	-30%
Agricultural Tractor	65,364	67,302	3%	65,025	4%
Trailer (Agricultural)	2,944	2,733	-7%	2,957	-8%
Motor Car	2,82,874	2,49,333	-12%	26,40,66	-6%
Motor Cycle/ Scooter	16,14,042	13,19,272	-18%	13,35,950	-1%



- Passenger car sales decline amid weak consumer demand owing to market uncertainty.
- Tractors and construction equipment sales appear to be the lone bright spot



ELECTRIC VEHICLE SALES

CATEGORY (Pure EV)	MAY-25	JUN-25	MoM%	JUN-24	YoY%
E-2 Wheelers	88,986	93,872	5%	26,509	254%
E-3 Wheelers	23,382	23,793	2%	3,119	663%
Motor Car	9,693	9,804	1%	717	1,267%

- EV segment demand is fueled by strong growth and the launch of new models by automakers.

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PETROL & DIESEL CONSUMPTION

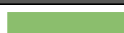
(Volume in MT)

MONTH	MAY-25	JUN-25	MoM%	JUN-24	YoY%
Petrol	3.77	3.51	-7%	3.30	6.4% 
Diesel	8.57	8.08	-6%	7.98	1.2% 

- Fuel consumption growth dropped in June compared to May.
- However, petrol and diesel sales witnessed growth on YoY basis.



FASTAG COLLECTION

MONTH	MAY-25	JUN-25	MoM%	JUN-24	YoY%
Volume (in Mn)	404.43	386.28	-4.5%	334.41	16% 
Values (Cr)	7087.16	6793.4	-4.1%	5779.84	18% 

- While FASTag collections dipped in June due to seasonality factor, there was a YoY increase in both toll volume and value.

E-way bill

INTRA STATE

Month	APR-25	MAY-25	MoM%	MAY-24	YoY%
E-way bill generations	7,63,68,276	7,95,17,742	4%	6,68,27,787	19% 
No. of suppliers	14,89,752	15,04,922	1%	14,35,243	5% 
Value (In Cr.)	14,72,080.664	15,03,770.9	2%	13,38,423.60	12% 

INTER STATE

Month	APR-25	MAY-25	MoM%	MAY-24	YoY%
E-way bill generations	4,11,89,825	4,14,07,705	1%	3,47,47,034	19% 
No. of suppliers	11,14,589	11,25,935	1%	10,84,941	4% 
Value (In Cr.)	12,62,858.353	13,13,775.4	4%	11,99,459.32	10% 

