

MOBILITY

BULLETIN

- Truck rentals turn firm in select trunk routes in a build up to the upcoming festival season
- Availability and movement of trucks were hampered in several parts of north India due to heavy rains and related damages caused to infrastructure
- Wait and watch approach by buyers, awaiting GST council rates, impacted vehicle sales. Tractor sales plummeted
- With GST rates getting reduced on regular consumption items, the sentiment has turned positive across commercial hubs



“Truck rentals remained steady to firm with manufacturers moving goods to commercial hubs in a build up to the upcoming festival season. Early indications from Kerala suggest that we are heading for a significant jump in Onam (start of Indian festival season) consumption which is a good augury. However, there are issues of stagnation at some export hubs due to import tariffs by USA.

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

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

Truck Route	Jul-25	Aug-25	MoM%	Aug-24	YoY%
Delhi-Mumbai-Delhi	162000	162000	0.0%	152000	7%
Delhi-Kolkata-Delhi	156000	158000	1.3%	150000	5%
Delhi-Hyderabad-Delhi	192000	192000	0.0%	180000	7%
Delhi-Chennai-Delhi	209000	210000	0.5%	206000	2%
Delhi-Bengaluru-Delhi	216000	217000	0.5%	208000	4%
Mumbai-Chennai-Mumbai	162000	162000	0.0%	150000	8%
Mumbai-Kolkata-Mumbai	198000	198000	0.0%	195000	2%
Bengaluru-Kolkata-Bengaluru	206000	208000	1.0%	198000	5%
Bengaluru-Mumbai-Bengaluru	133000	135000	1.5%	125000	8%
Guwahati-Mumbai-Guwahati	276000	279000	1.1%	265000	5%
Kolkata-Guwahati-Kolkata	146500	146500	0.0%	136000	8%

- Truck rentals turned positive MoM ahead of upcoming festive season.
- Trucking activity was hampered across northern India, specifically Punjab, Himachal Pradesh and Uttarakhand due to heavy rains.

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VEHICLE (RETAIL) SALES

CATEGORY	JUL-25	AUG-25	MoM%	AUG-24	YoY%
Goods Carrier	59,544	60,530	2%	57,328	6%
e-Rickshaw with Cart	6,817	6,213	-9%	4,396	41%
Three Wheeler (Goods)	9,870	9,698	-2%	8,651	12%
Tractor (Commercial)	6,722	4,765	-29%	4,729	1%
Bus	7,559	7,589	0%	5,333	42%
Construction Equipment Vehicle (Commercial)	430	430	0%	574	-25%
Maxi Cab	2,562	2,201	-14%	2,381	-8%
Earth Moving Equipment	294	316	7%	483	-35%
Agricultural Tractor	81,124	79,187	-2%	59,917	32%
Trailer (Agricultural)	2,920	3,049	4%	2,864	6%
Motor Car	3,02,979	2,93,830	-3%	2,91,145	1%
Motor Cycle/ Scooter	13,18,964	13,33,240	1%	12,98,728	3%

- Vehicle buyers turned cautious and awaited drop in GST rates.
- Car sales fell 3% MoM.
- Tractor sales fell sharply by 29% MoM.



ELECTRIC VEHICLE SALES

CATEGORY (Pure EV)	JUL-25	AUG-25	MoM%	AUG-24	YoY%
E-2 Wheelers	90,469	91,656	1%	42,528	116%
E-3 Wheelers	28,384	27,406	-3%	5,855	368%
Motor Car	12,360	14,089	14%	1,302	982%

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PETROL & DIESEL CONSUMPTION

 (Volume in MT)

MONTH	JUL-25	AUG-25	MoM%	AUG-24	YoY%
Petrol	3.48	3.53	1%	3.36	5.1%
Diesel	7.35	6.56	-11%	6.50	0.9%

- Diesel sales fell sharply in August due to lesser fleet movement in northern India due to unprecedented rains.



FASTAG COLLECTION

MONTH	JUL-25	AUG-25	MoM%	AUG-24	YoY%
Volume(in Mn)	370.60	381.96	3.1%	328.99	16%
Values(Cr)	6,669.12	7,052.91	5.8%	5,610.64	26%