

MOBILITY

BULLETIN

- Truck rentals rose smartly across key truck routes as trade prepared for GST Bachat Utsav beginning September 22, 2025.
- In some sectors there were shortage of trucks during the last week of September as industry rushed to ship consumer goods to commercial hubs.
- Goods movement may turn costly in Delhi with the proposed ban on entry of BS IV vehicles from November 1, 2025.
- Movement of trucks were impacted in the West Bengal region and along NH 19 due to torrential rain impact.



“The government’s push to lower cost of goods with the lowering of GST rates has pushed shopping centres into a frenzy. A shortage of trucks to ferry goods to commercial hubs and festival shopping lifted the spirits across the country. While the transportation industry is rejoicing the cuts in GST, the combination of above-normal monsoon rains, a strong kharif harvest, and stable policy rates has boosted both rural and urban purchasing power. The proposed entry ban of BS IV vehicles into New Delhi from November 1st is likely to cause some disruptions in goods movement — **Y S Chakravarti**, Managing Director and CEO, Shriram Finance

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

Truck Route	Aug-25	Sep-25	MoM%	Sep-24	YoY%
Delhi-Mumbai-Delhi	1,62,000	1,62,000	0.0%	1,53,000	6%
Delhi-Kolkata-Delhi	1,58,000	1,61,000	1.9%	1,50,000	7%
Delhi-Hyderabad-Delhi	1,92,000	1,94,000	1.0%	1,81,000	7%
Delhi-Chennai-Delhi	2,10,000	2,12,000	1.0%	2,06,000	3%
Delhi-Bengaluru-Delhi	2,17,000	2,16,000	-0.5%	2,10,000	3%
Mumbai-Chennai-Mumbai	1,62,000	1,64,000	1.2%	1,51,000	9%
Mumbai-Kolkata-Mumbai	1,98,000	1,99,000	0.5%	1,94,000	3%
Bengaluru-Kolkata-Bengaluru	2,08,000	2,07,000	-0.5%	1,98,000	5%
Bengaluru-Mumbai-Bengaluru	1,35,000	1,37,000	1.5%	1,27,000	8%
Guwahati-Mumbai-Guwahati	2,79,000	2,77,000	-0.7%	2,64,000	5%
Kolkata-Guwahati-Kolkata	1,46,500	1,48,000	1.0%	1,36,000	9%

- Truck rentals remained largely flat or saw minor changes from August to September, reflecting a temporary lull in demand pre-GST.
- MoM rental rate changes were minimal, reflecting a deferral of major bookings until the GST revision kicked in.
- YoY rental growth of up to 9% across routes signals rising logistics demand for the upcoming festive season post-GST rollout.



VEHICLE (RETAIL) SALES

CATEGORY	AUG-25	SEP-25	MoM%	SEP-24	YoY%	
Goods Carrier	60,653	60,182	-1%	58,496	3%	
e-Rickshaw with Cart	6,212	6,031	-3%	4,570	32%	
Three Wheeler (Goods)	9,700	9,571	-1%	9,116	5%	
Tractor (Commercial)	4,763	3,713	-22%	4,359	-15%	
Bus	7,624	5,476	-28%	5,282	4%	
Construction Equipment Vehicle (Commercial)	433	500	15%	713	-30%	
Maxi Cab	2,236	1,599	-28%	1,798	-11%	
Earth Moving Equipment	317	394	24%	496	-21%	
Agricultural Tractor	79,192	59,391	-25%	57,092	4%	
Trailer (Agricultural)	3,048	4,068	33%	2,717	50%	
Motor Car	3,00,539	2,76,707	-8%	2,57,329	8%	
Motor Cycle/ Scooter	13,37,900	12,49,747	-7%	11,68,147	7%	



ELECTRIC VEHICLE SALES

CATEGORY (Pure EV)	AUG-25	SEP-25	MoM%	SEP-24	YoY%	
E-2 Wheelers	92,031	93,763	2%	54,274	73%	
E-3 Wheelers	27,405	27,507	0%	6,399	330%	
Motor Car	14,741	12,556	-15%	1,984	533%	

- Strong YoY numbers across all EV segments.
- MoM demand witnessed a mixed bag, impacted by GST restructuring, the Shradh period and start of Navratri with lower GST on ICE vehicles.

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PETROL & DIESEL CONSUMPTION

(Volume in MT)

MONTH	AUG-25	SEP-25	MoM%	SEP-24	YoY%
Petrol	3.53	3.39	-4%	3.15	7.5%
Diesel	6.56	6.77	3%	6.37	6.3%

- Petrol usage fell month-on-month due to rains affecting personal mobility.
- Demand for diesel grew in September with higher freight movement following the recent GST rate cuts.
- YoY demand for auto fuel rose, driven by growth in the personal mobility segment, festive season stocking and GST rate cuts.



FASTAG COLLECTION

MONTH	AUG-25	SEP-25	MoM%	SEP-24	YoY%
Volume (in Mn)	381.96	349.25	-8.6%	318.40	10%
Values (Cr)	7,052.91	6,501.28	-7.8%	5,620.48	16%

Data as of 29th Sept 2025

E-way bill

INTRA STATE

Month	JUL-25	AUG-25	MoM%	AUG-24	YoY%
E-way bill generations	8,59,64,871	8,42,90,599	-2%	6,70,86,470	26%
No. of suppliers	15,36,941	15,19,940	-1%	14,39,360	6%
Value (In Cr.)	15,45,683.126	15,06,335.791	-3%	13,07,131.75	15%

INTER STATE

Month	JUL-25	AUG-25	MoM%	AUG-24	YoY%
E-way bill generations	4,41,77,983	4,37,73,111	-1%	3,67,46,215	19%
No. of suppliers	11,42,264	11,31,311	-1%	10,81,903	5%
Value (In Cr)	13,51,526.853	13,25,645.759	-2%	11,89,676.28	11%

