



MOBILITY BULLETIN

● Truck rentals soared to new highs in most trunk routes in December on the back of renewed demand for goods carriers

- Demand for BSVI compliant trucks was high in the NCR region due to GRAP restrictions
- Foggy conditions and snowing in the upper Himalayan regions impacted movement of vehicles and goods
- CY 2025 was the best-ever year for sales of two-wheelers, passenger cars, three-wheeler goods carriers, maxi cabs and buses



The demand for trucks remained high in December thereby pushing up truck rentals across major trunk routes. The GST cuts and lower interest rates has resulted in higher vehicle sales across categories. Some manufacturers have increased vehicle prices from January citing higher input costs. This may have a temporary impact on new vehicle sales.

– Sudarshan Holla, Joint Managing Director & COO, Commercial Vehicles, Shriram Finance

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

Truck Route	Nov-25	Dec-25	MoM%	Dec-24	YoY%
Delhi-Mumbai-Delhi	1,66,000	1,68,000	1.2%	1,50,000	12%
Delhi-Kolkata-Delhi	1,62,000	1,65,000	1.9%	1,52,000	9%
Delhi-Hyderabad-Delhi	1,97,000	1,98,000	0.5%	1,82,000	9%
Delhi-Chennai-Delhi	2,12,000	2,13,000	0.5%	2,05,000	4%
Delhi-Bengaluru-Delhi	2,17,000	2,20,000	1.4%	2,05,000	7%
Mumbai-Chennai-Mumbai	1,66,000	1,67,000	0.6%	1,52,000	10%
Mumbai-Kolkata-Mumbai	1,96,000	1,98,000	1.0%	1,89,000	5%
Bengaluru-Kolkata-Bengaluru	2,09,000	2,08,000	-0.5%	1,99,000	5%
Bengaluru-Mumbai-Bengaluru	1,36,000	1,37,000	0.7%	1,25,000	10%
Guwahati-Mumbai-Guwahati	2,80,000	2,78,000	-0.7%	2,65,000	5%
Kolkata-Guwahati-Kolkata	1,50,000	1,52,000	1.3%	1,38,000	10%

- Truck rentals remained firm due to continued demand for goods carriers.
- Trucking activity was impacted in the hilly region due to fog and snowing in the upper Himalayan regions.



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VEHICLE (RETAIL) SALES

CATEGORY	NOV-25	DEC-25	MoM%	DEC-24	YoY%	Jan-Dec24	Jan-Dec25	% Growth
Goods Carrier	80,146	70,662	-12%	56,238	26%	7,79,963	8,27,325	6% █
e-Rickshaw with Cart	8,153	7,607	-7%	5,824	31%	58,932	83,400	42% █
Three Wheeler (Goods)	13,353	11,215	-16%	9,126	23%	1,25,015	1,32,920	6% █
Tractor (Commercial)	7,522	6,135	-18%	5,552	11%	62,599	65,796	5% █
Bus	4,914	5,688	16%	4,392	30%	68,900	76,970	12% █
Construction Equipment Vehicle (Commercial)	526	462	-12%	813	-43%	9,422	7,931	-16% █
Maxi Cab	2,360	2,062	-13%	1,503	37%	25,033	27,193	9% █
Earth Moving Equipment	388	378	-3%	607	-38%	7,370	5,545	-25% █
Agricultural Tractor	1,16,865	1,07,143	-8%	92,791	15%	8,19,784	9,12,968	11% █
Trailer (Agricultural)	5,465	5,395	-1%	3,762	43%	41,368	46,919	13% █
Motor Car	3,73,447	3,50,649	-6%	2,78,840	26%	37,40,100	41,00,068	10% █
Motor Cycle/ Scooter	24,89,731	12,77,118	-49%	11,66,744	9%	1,83,32,378	1,97,18,656	8% █

- Two wheeler sales nears 2 crore vehicle mark in 2025, highest ever in a calendar year.
- Several categories including goods carrier, buses, maxi cabs, motor cars saw their highest-ever sales in a calendar year.



ELECTRIC VEHICLE SALES

CATEGORY (PURE EV)	NOV-25	DEC-25	MoM%	DEC-24	YoY %	Jan-Dec24	Jan-Dec25	% Growth
E-2 Wheelers	1,07,810	88,956	-17%	56,155	58%	4,20,575	11,25,058	168% █
E-3 Wheelers	37,740	38,386	2%	7,844	389%	46,043	2,87,838	525% █
Motor Car	12,685	13,464	6%	5,304	154%	23,085	1,35,209	486% █

- EV segment registered its best-ever calendar year retail sales in CY2025.

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PETROL & DIESEL CONSUMPTION

(Volume in MT)

MONTH	NOV-25	DEC-25	MoM%	DEC-24	YoY%
Petrol	3.50	3.54	1%	3.32	6.7%
Diesel	8.55	8.46	-1%	8.05	5.0%

Fuel consumption remained steady in December 2025.



FASTAG COLLECTION

MONTH	NOV-25	DEC-25	MoM%	DEC-24	YoY%
Volume (in Mn)	342.18	373.89	9.3%	381.98	-2%
Values (Cr)	6,537.21	7,154.93	9.4%	6,642.21	8%

FASTag data as of 30th Dec 2025.

E-way bill

INTRA STATE

Month	OCT-25	NOV-25	MoM%	NOV-24	YoY%
E-way bill generations	8,42,23,882	8,59,77,778	2%	6,57,21,580	31%
No. of suppliers	15,24,378	15,62,756	3%	14,37,251	9%
Value (In Cr.)	15,30,862	15,81,019.5	3%	12,91,218.6	22%

INTER STATE

Month	OCT-25	NOV-25	MoM%	NOV-24	YoY%
E-way bill generations	4,24,43,998	4,27,03,323	1%	3,45,29,726	24%
No. of suppliers	11,30,397	11,63,439	3%	10,73,935	8%
Value (In Cr.)	13,12,716	13,76,622	5%	11,62,081	18%

