



TATA POWER-DDL

JMK  Research & Analytics

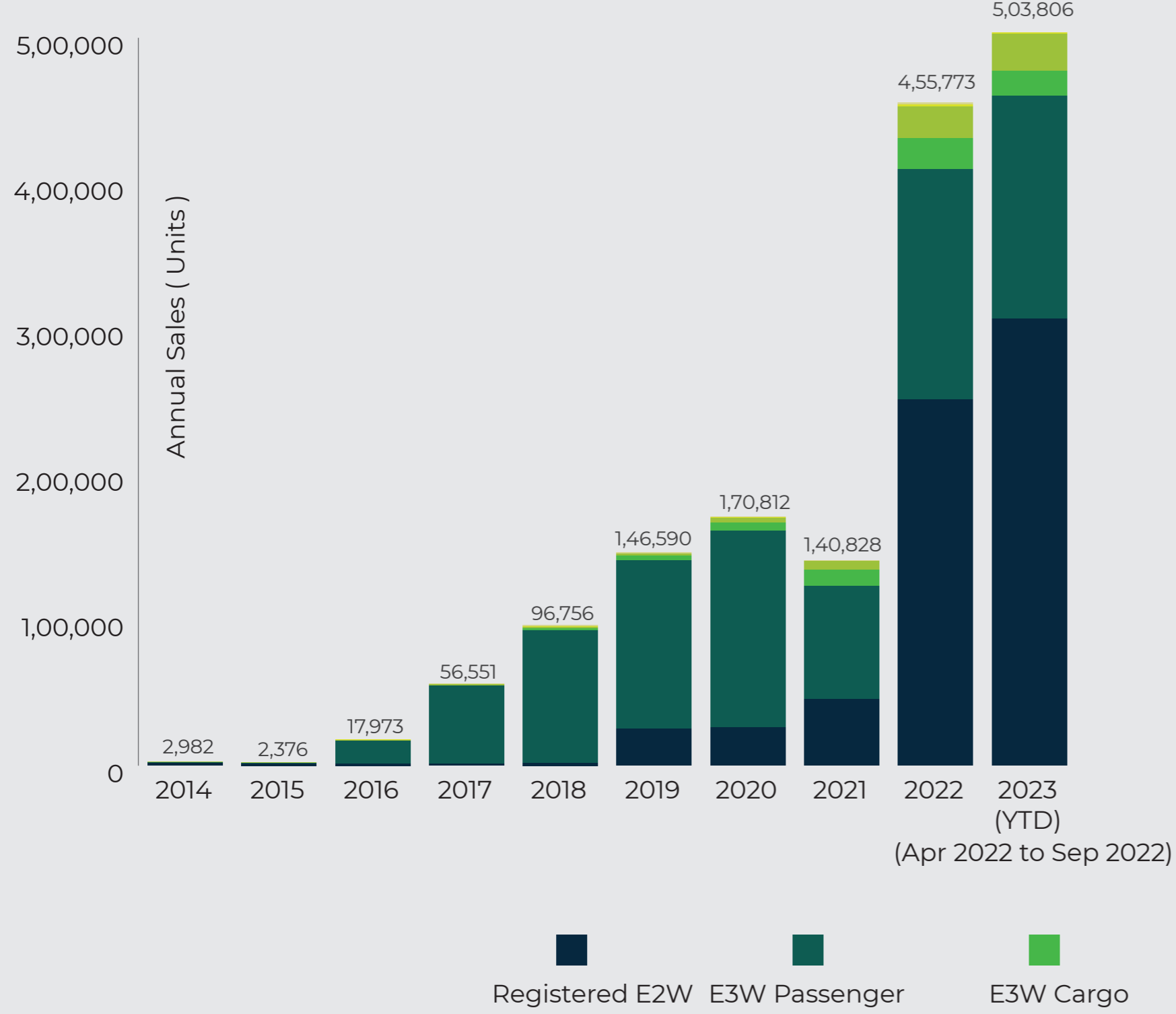
EV UPDATE Q3 2022

Lead Sponsor

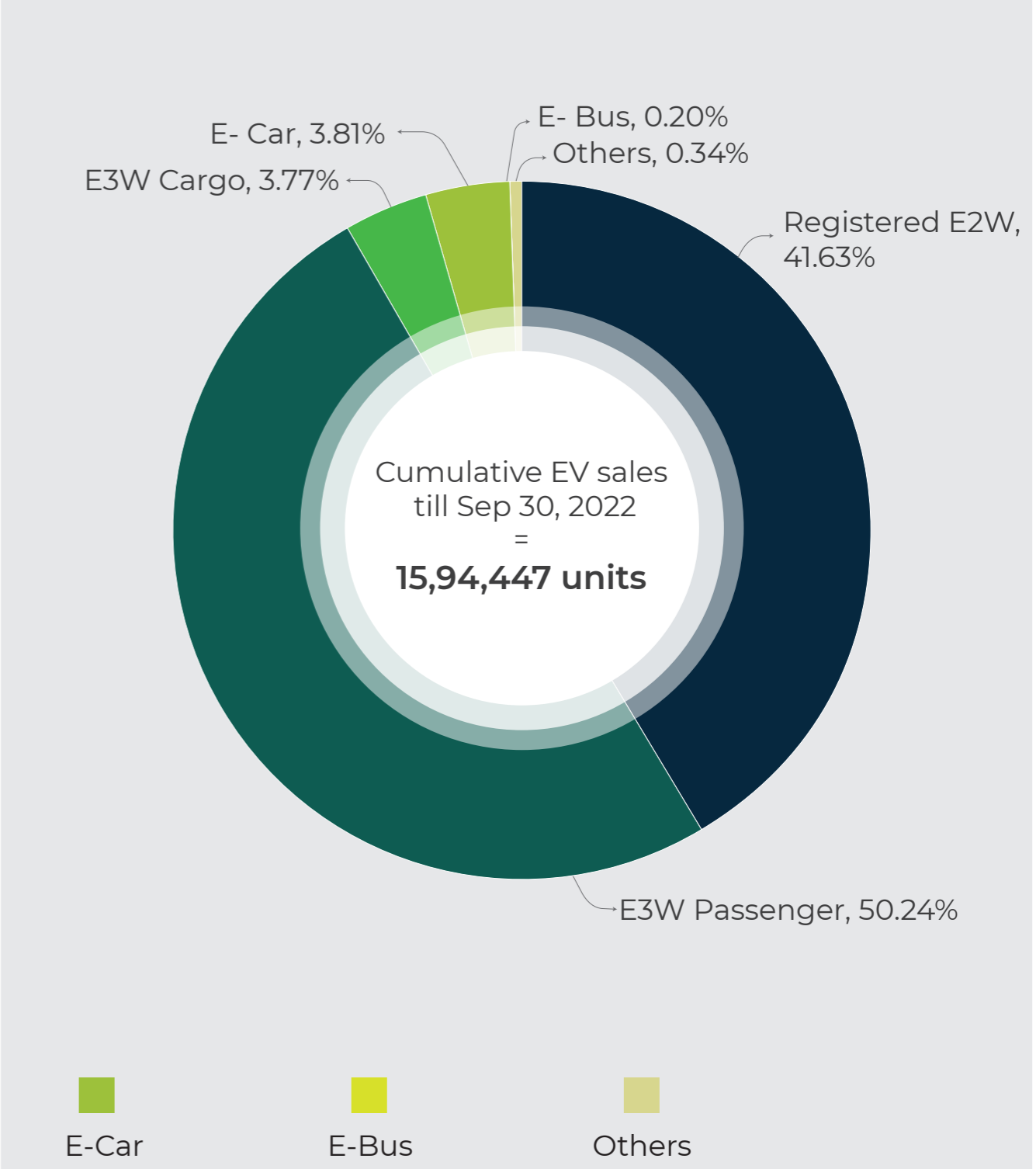
WAAREE | ESS
YOUR POWER INSURANCE

EV SALES TRENDS IN INDIA

EV ANNUAL SALES TREND IN INDIA
(FY2014-FY2023 (YTD))



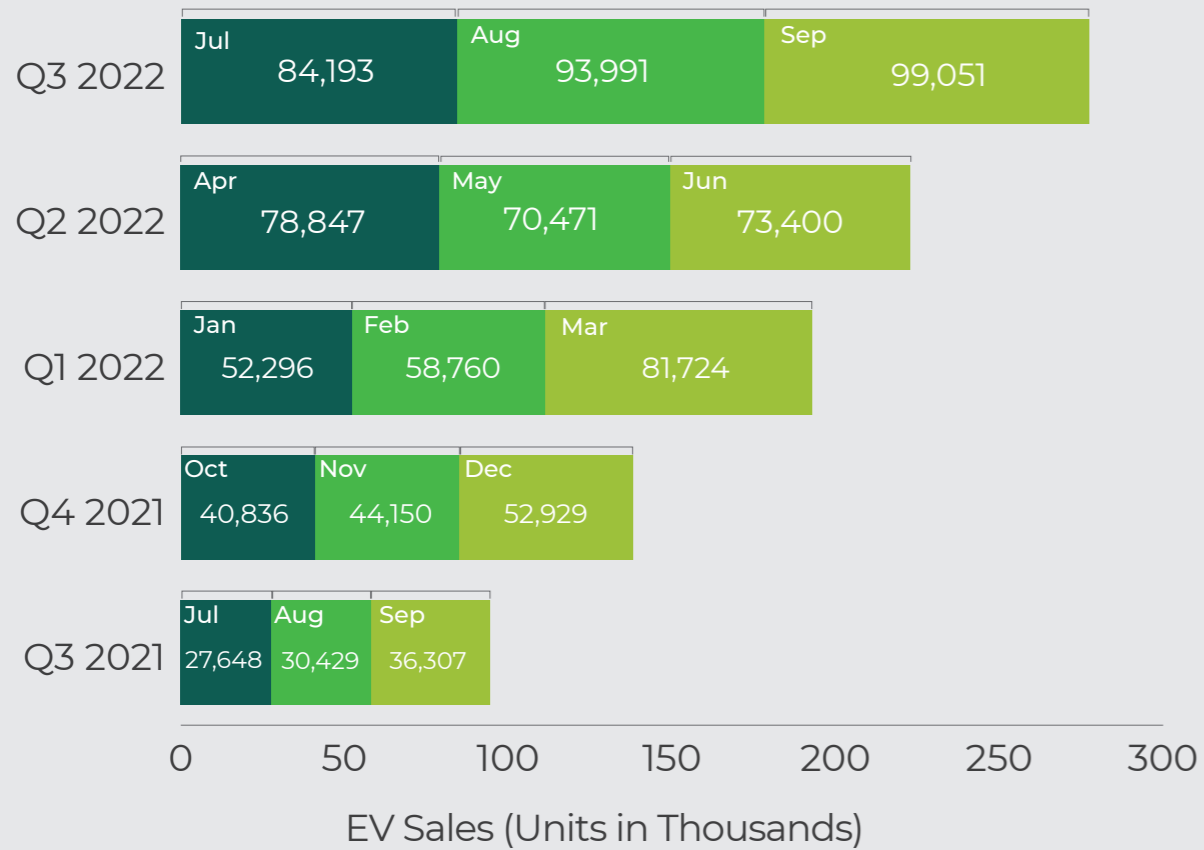
VEHICLE CATEGORY-WISE MARKET SHARE
(CUMULATIVE TILL FY2023)



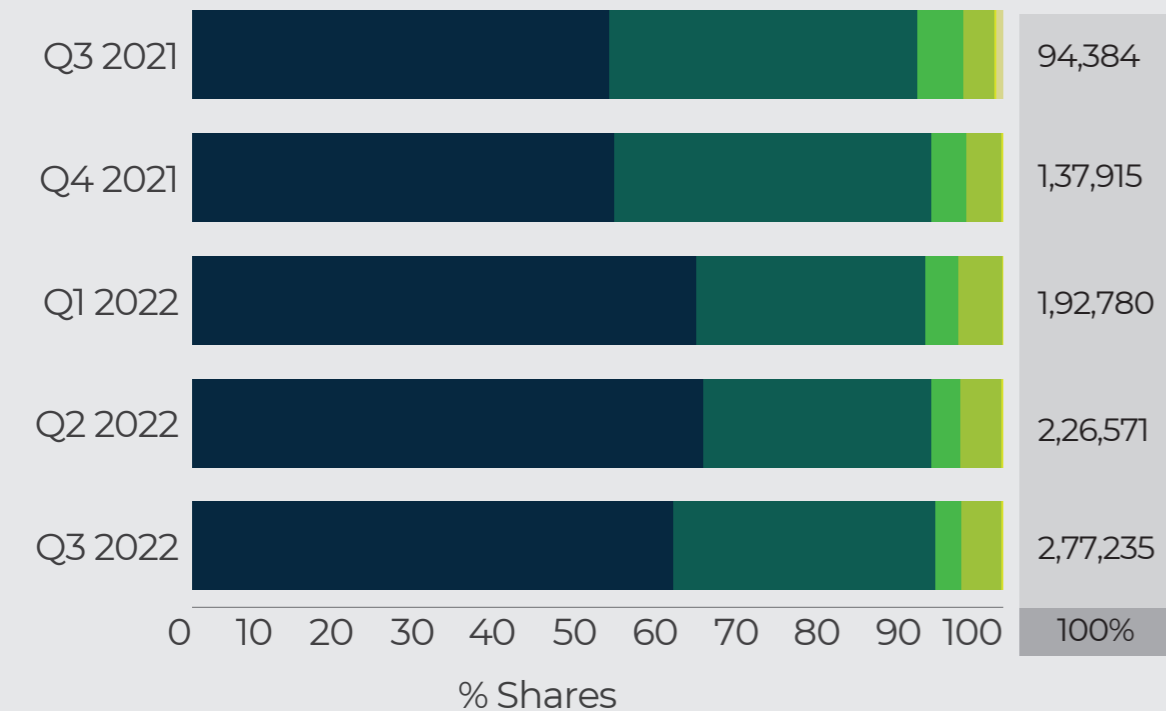
Source: Source: JMK Research Estimates, Vahan Dashboard, Telangana RTO, Company Press Release

Note: Others include adapted vehicles, fork-lifts, goods carriers, omni bus, agricultural tractors, trailer (agriculture vehicles), excavator (commercial) and power tiller.

QUARTERLY REGISTERED EV SALES TREND

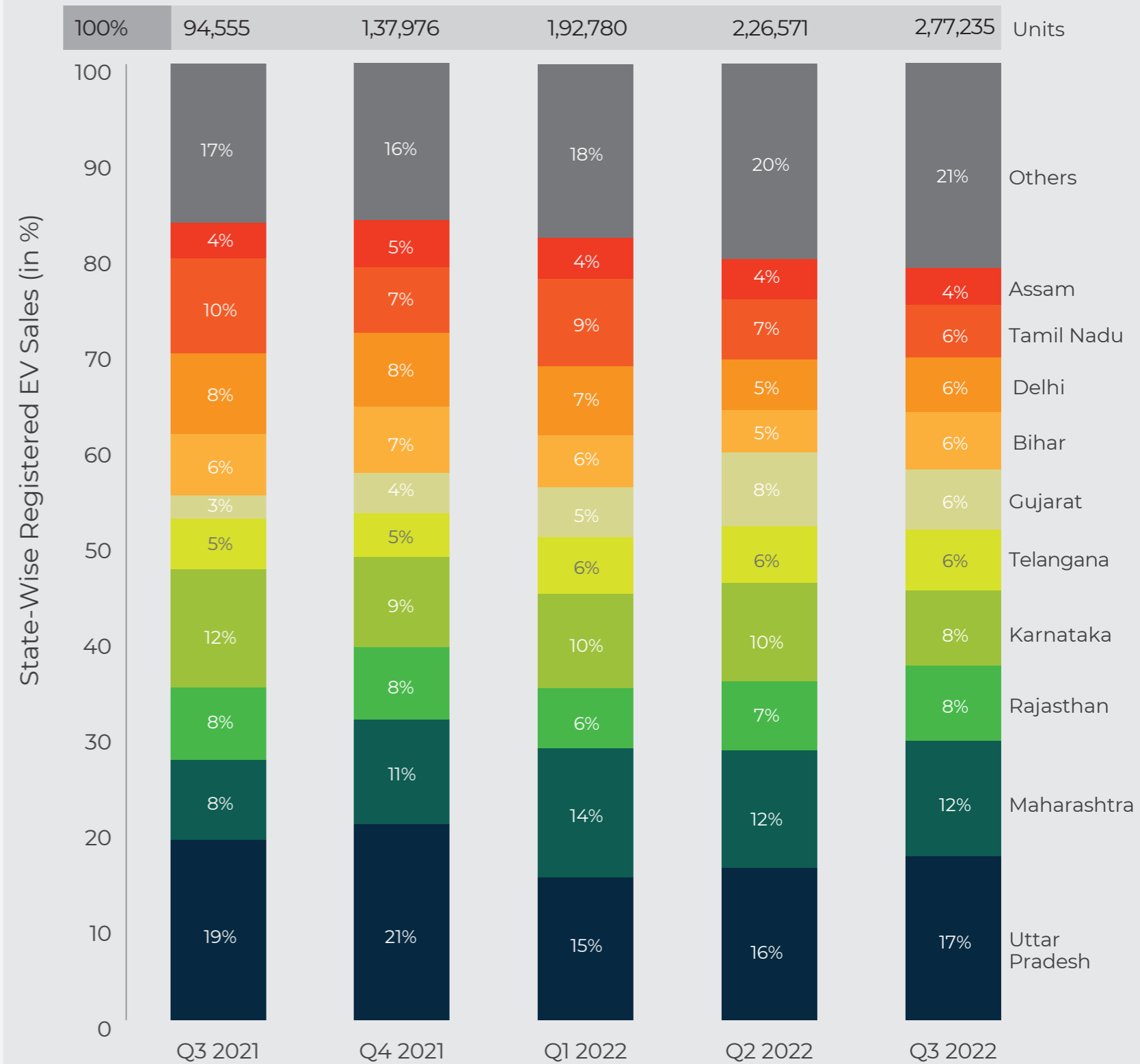


VEHICLE CATEGORY-WISE MARKET SHARE (Q32021 - Q32022)



Registered E2W | E3W Passenger | E3W Cargo | E-Car | E-Bus | Others

STATE-WISE REGISTERED EV SALES



Source: Vahan Dashboard, Telangana RTO, JMK Research

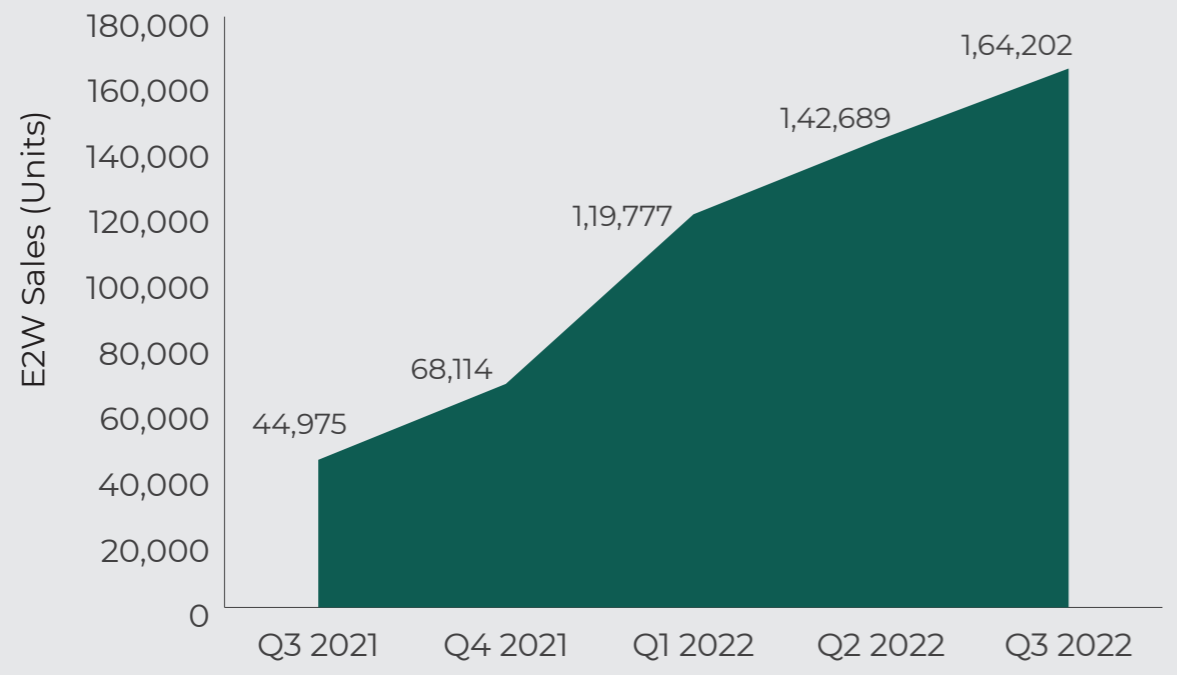
Note: Sales figures represent EVs registered across 1,377 RTOs in 35 states/ UTs; Sales data do not include numbers for Lakshadweep Sales figures for E2Ws represent only high-range E2W (Top speed > 25 kmph).

Others include Kerala, Odisha, and rest other 23 states/UTs.

ELECTRIC TWO-WHEELERS

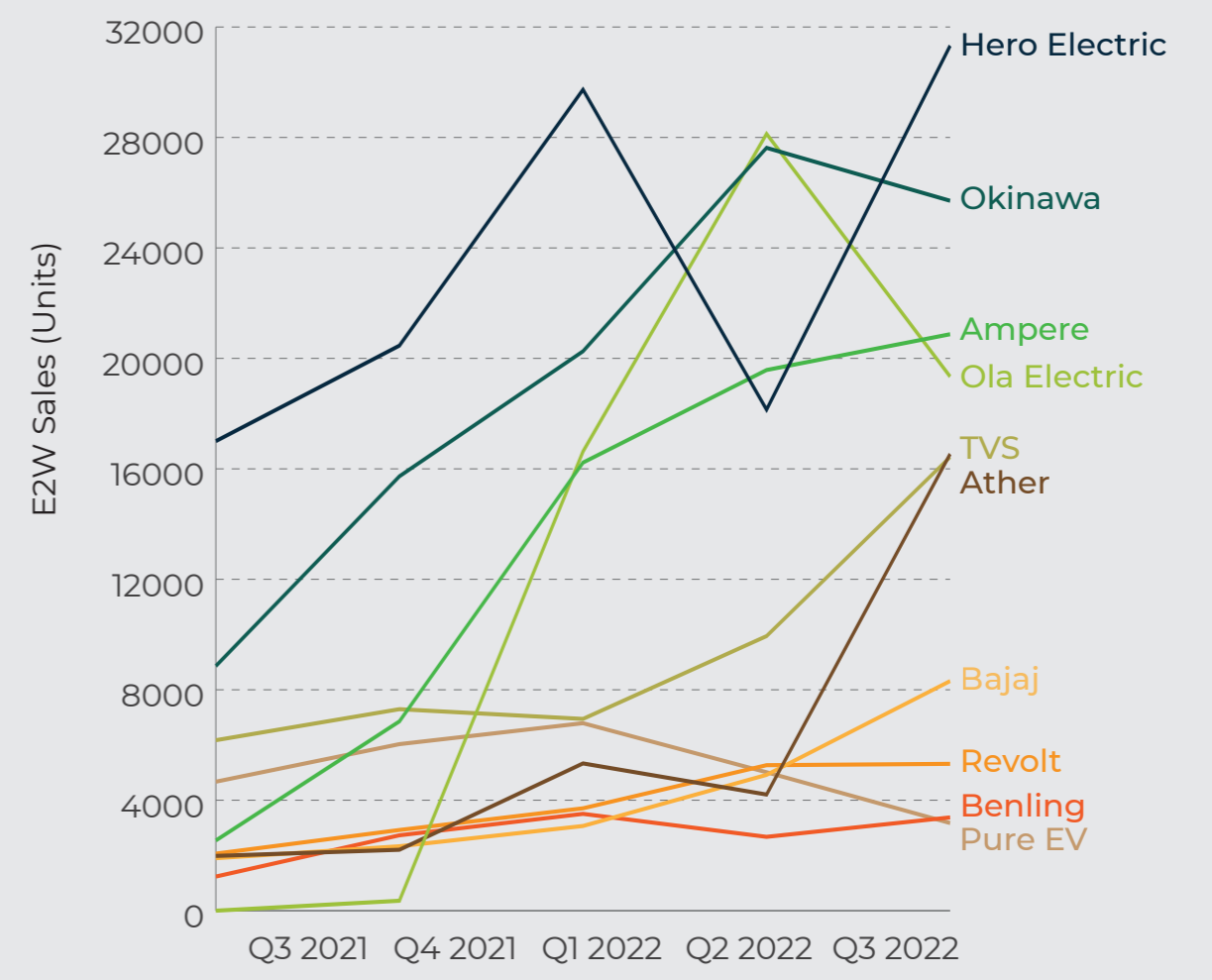
REGISTERED

E2W SALES TREND IN INDIA



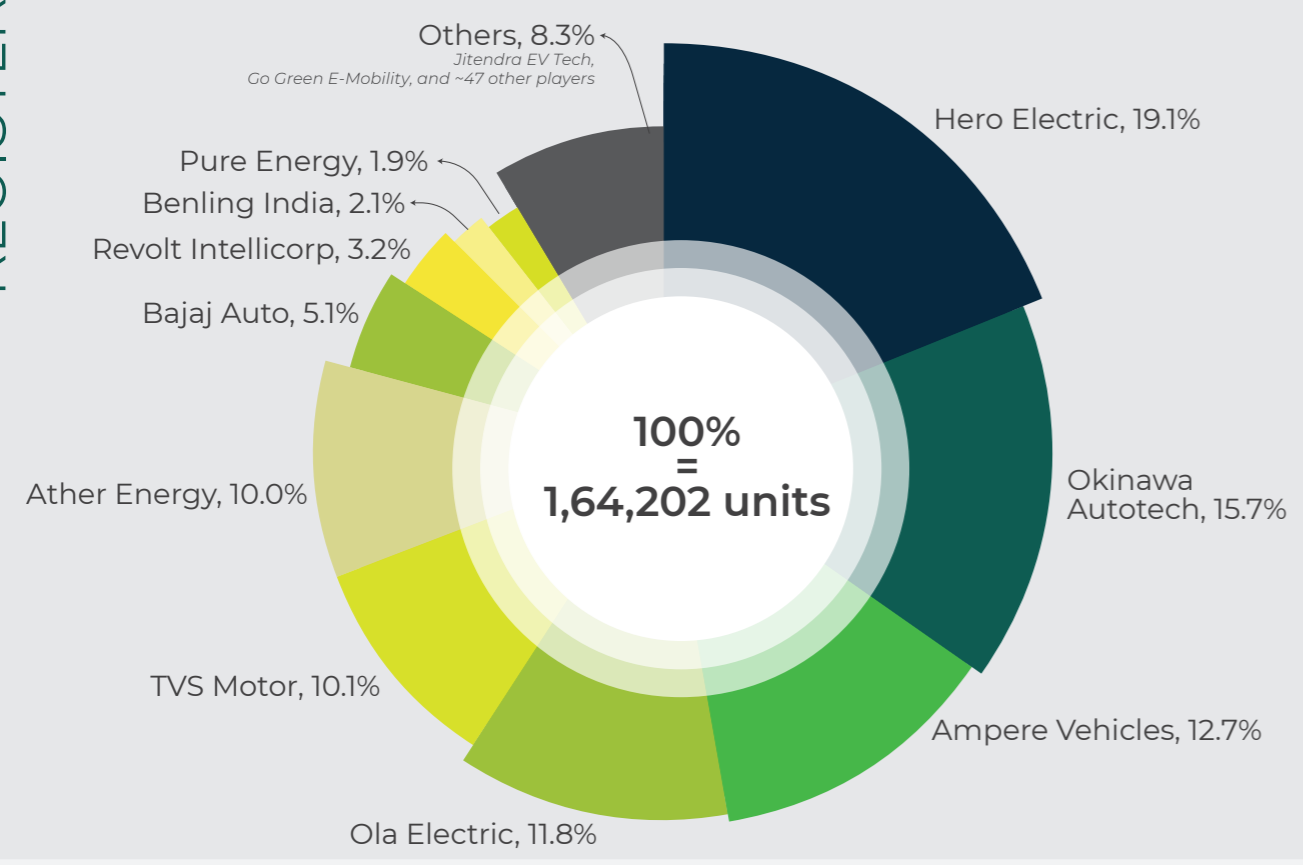
Note: Sales figures represent EVs registered across 1,377 RTOs in 35 states/ UTs; Sales data do not include numbers for Lakshadweep; Source: Vahan Dashboard, Telangana RTO, JMK Research, Company Press Release

KEY PLAYERS' E2W SALES

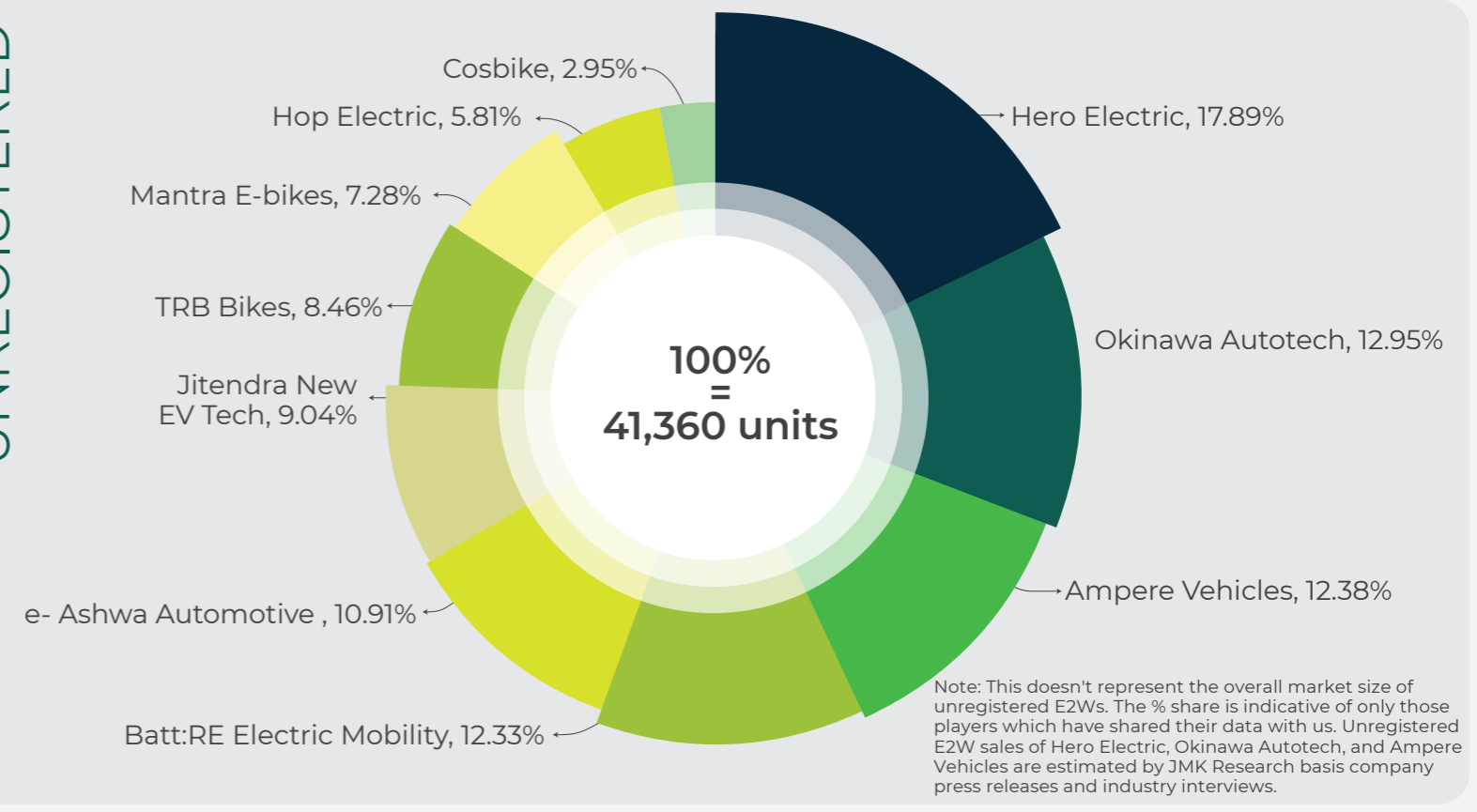


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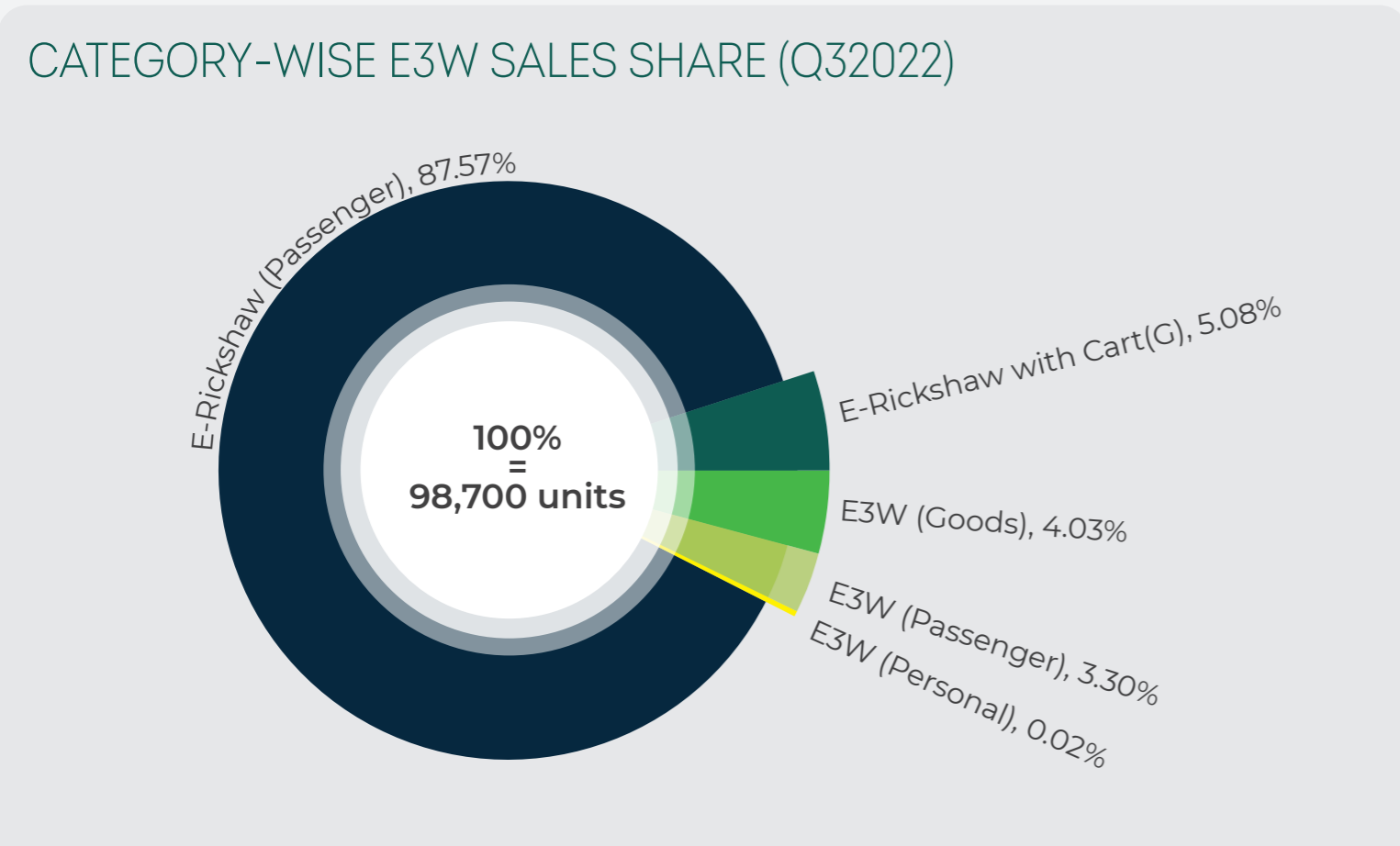
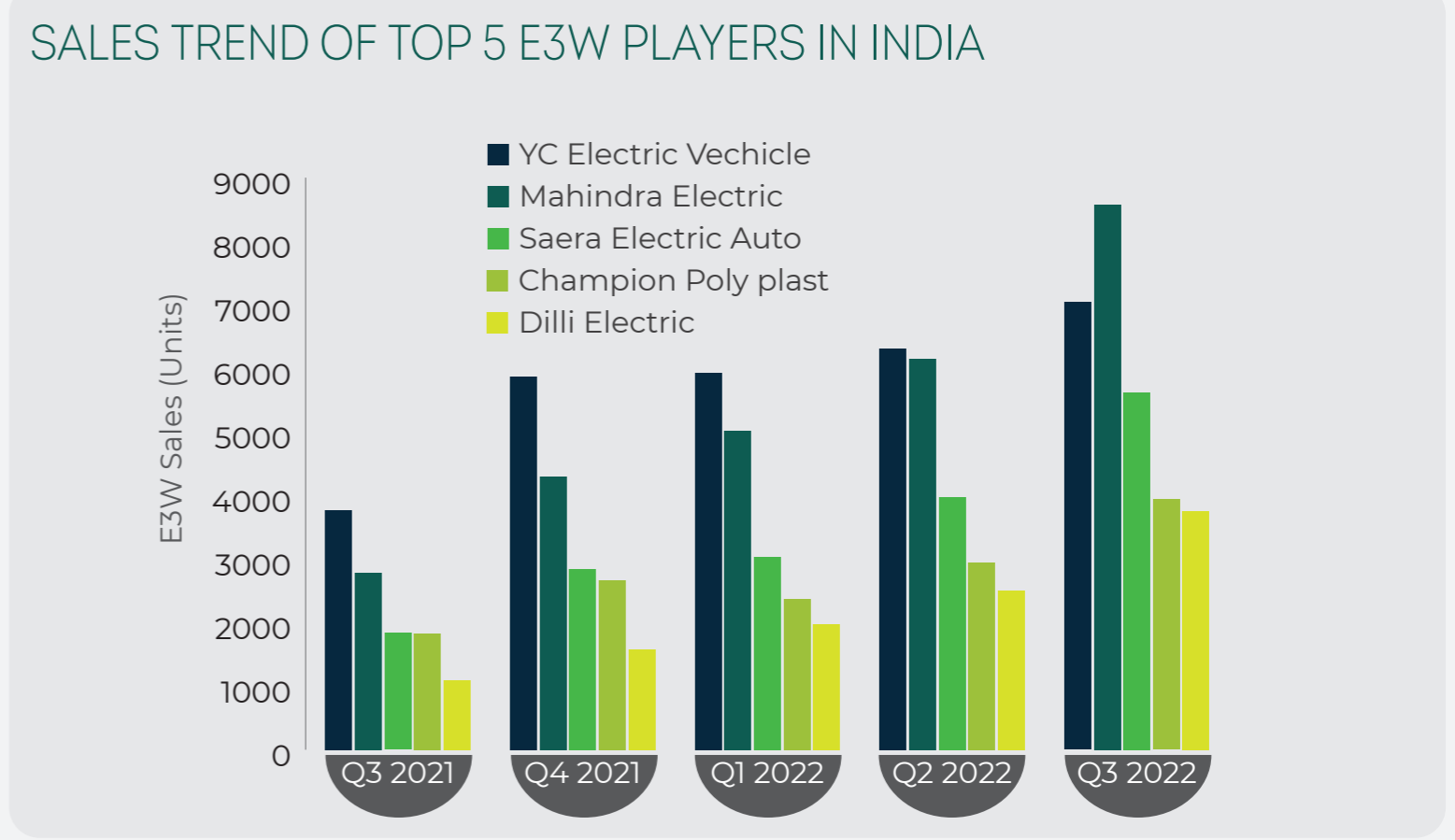
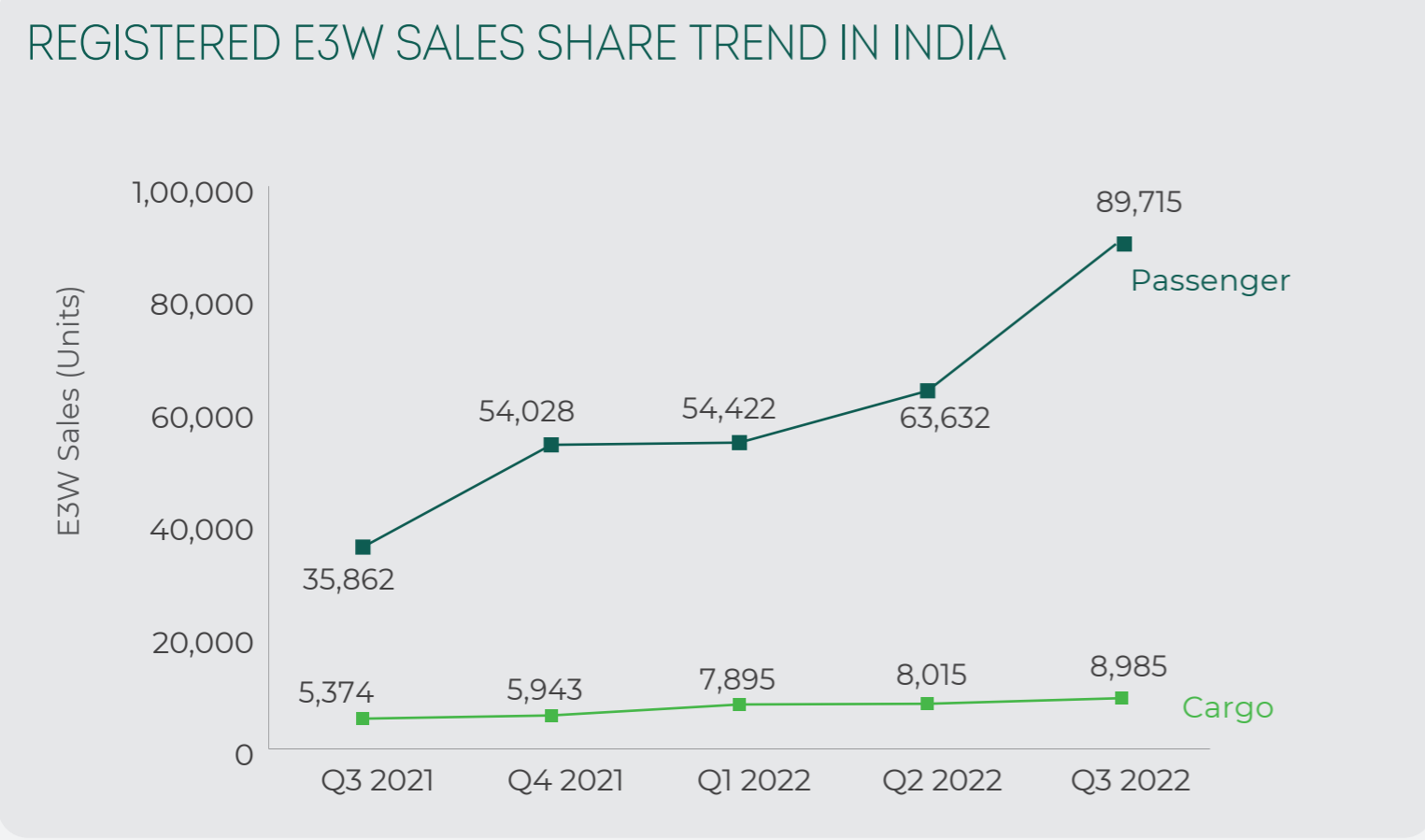
KEY PLAYERS' SALES SHARE (Q32022)



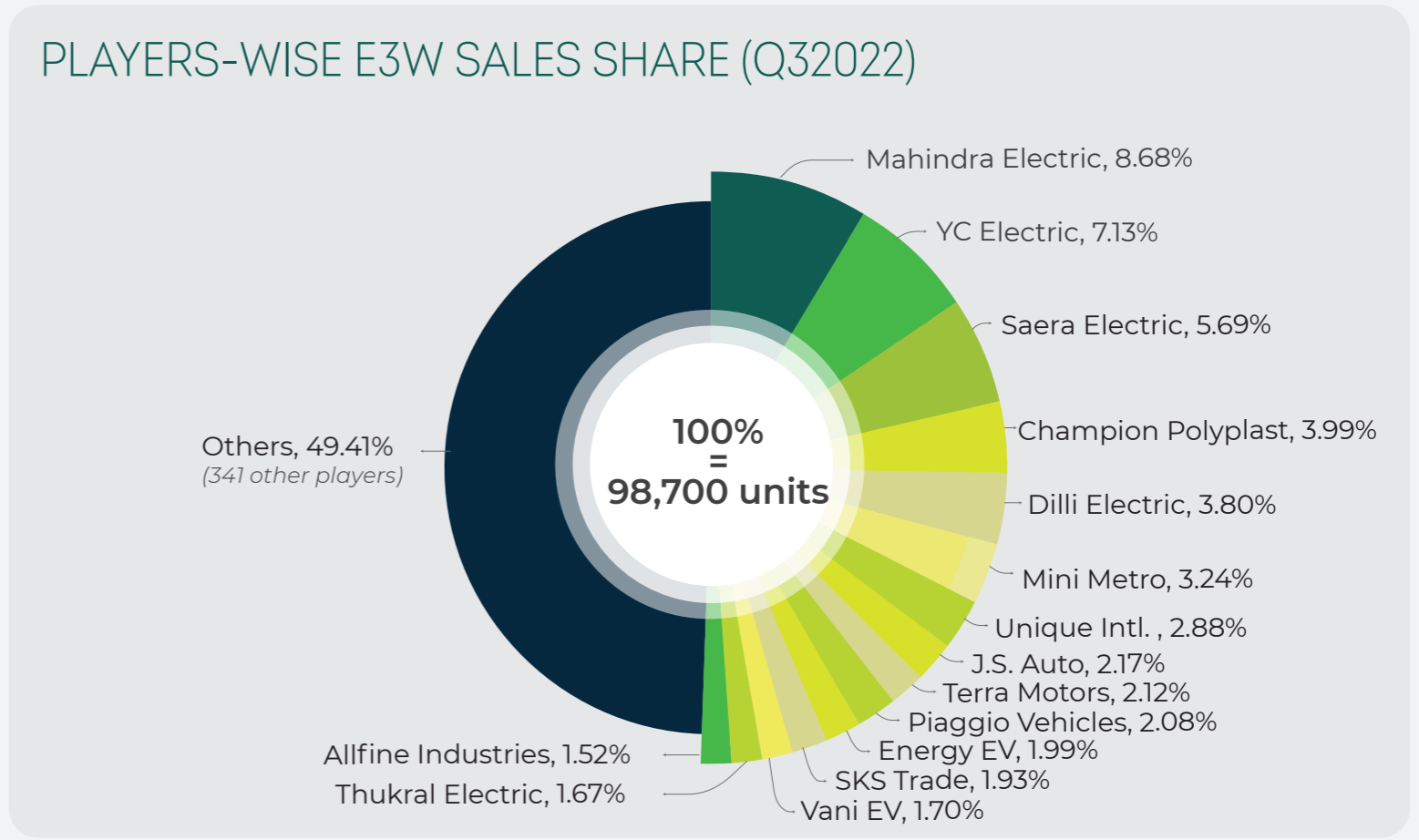
UNREGISTERED



ELECTRIC THREE-WHEELERS

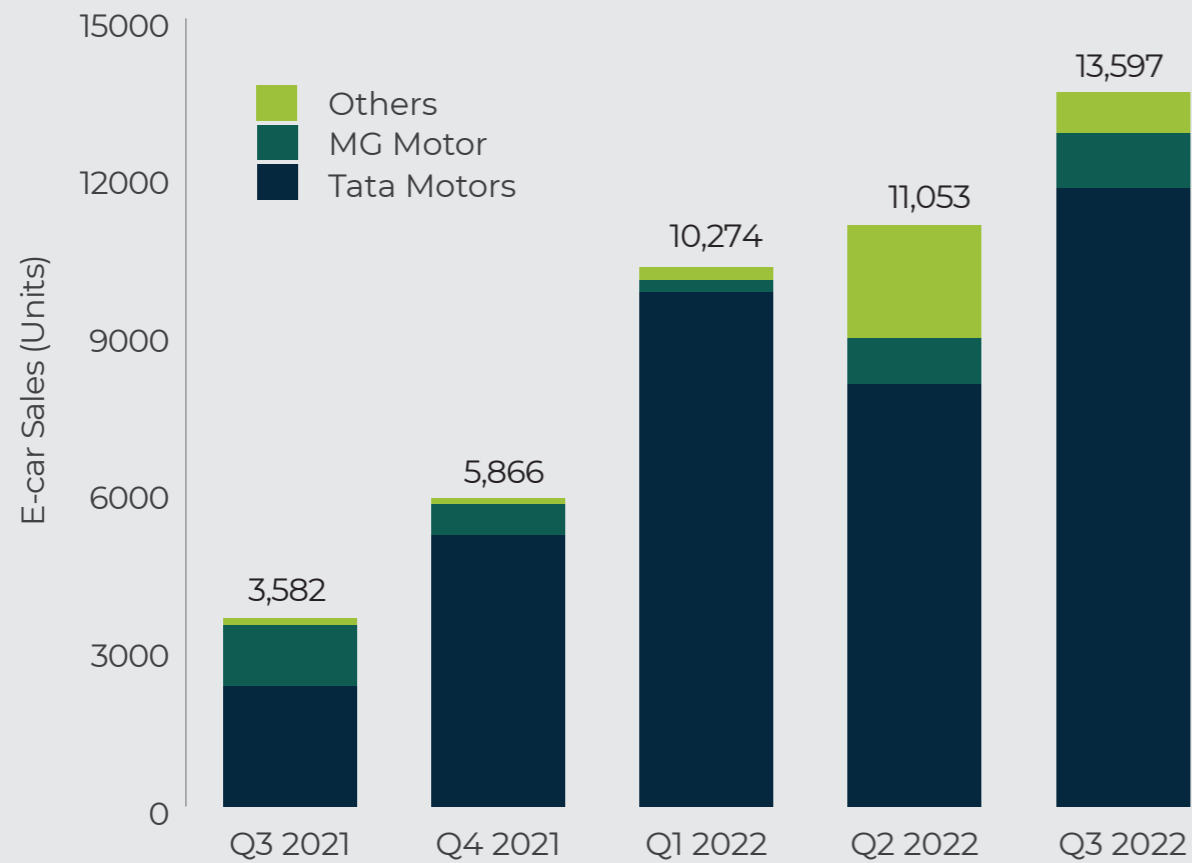


Note: E3W (Passenger) sales stakes into account E3W (Passenger), E3W (Personal), and E-Rickshaw (Passenger) sales; E3W (Cargo) takes into account E3W (Goods) and E-Rickshaw with Cart.



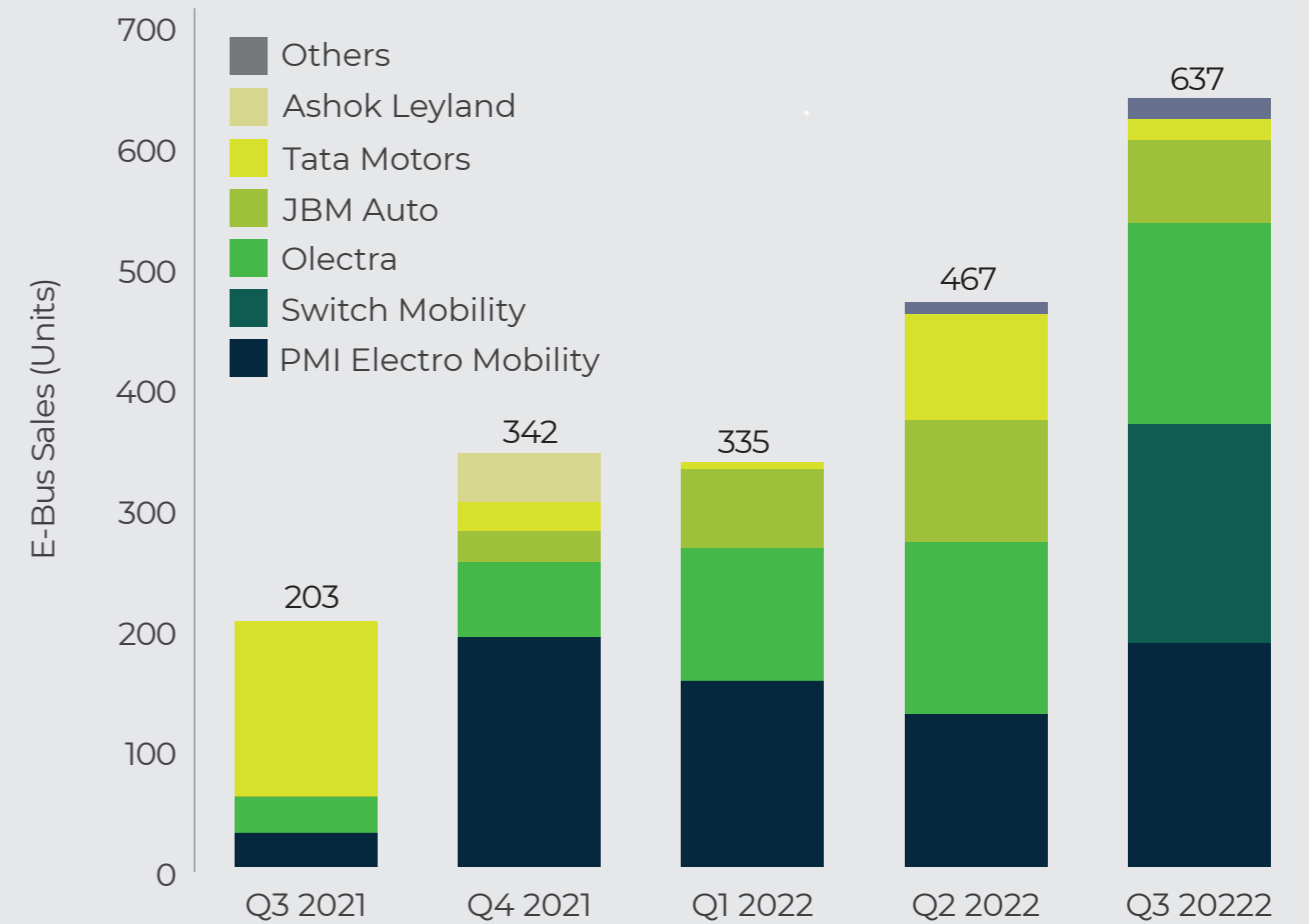
Source: Vahan Dashboard, Telangana RTO, JMK Research
 Note: Sales figures represent E3W players registered across 1,377 RTOs in 35 states/ UTs; Sales data do not include numbers for Lakshadweep

ELECTRIC CARS



Note: Sales figures represent E-Cars registered across 1,377 RTOs in 35 states/ UTs; Sales data do not include numbers for Lakshadweep; Others include sales registered by Hyundai, Mahindra, Audi, Toyota, Mercedes, Jaguar, BYD, Ampere, BMW, and Porsche
Source: Vahan Dashboard, Telangana RTO, Company Press Release, JMK Research

ELECTRIC BUSES



Note: Sales figures represent E-Bus registered across 1,377 RTOs in 35 states/ UTs; Sales data do not include numbers for Lakshadweep; Others include Veera Vahana, VE Commercial and Mytrah Mobility
Source: Vahan Dashboard, Telangana RTO, Company Press Release, JMK Research

CHARGE POINTS



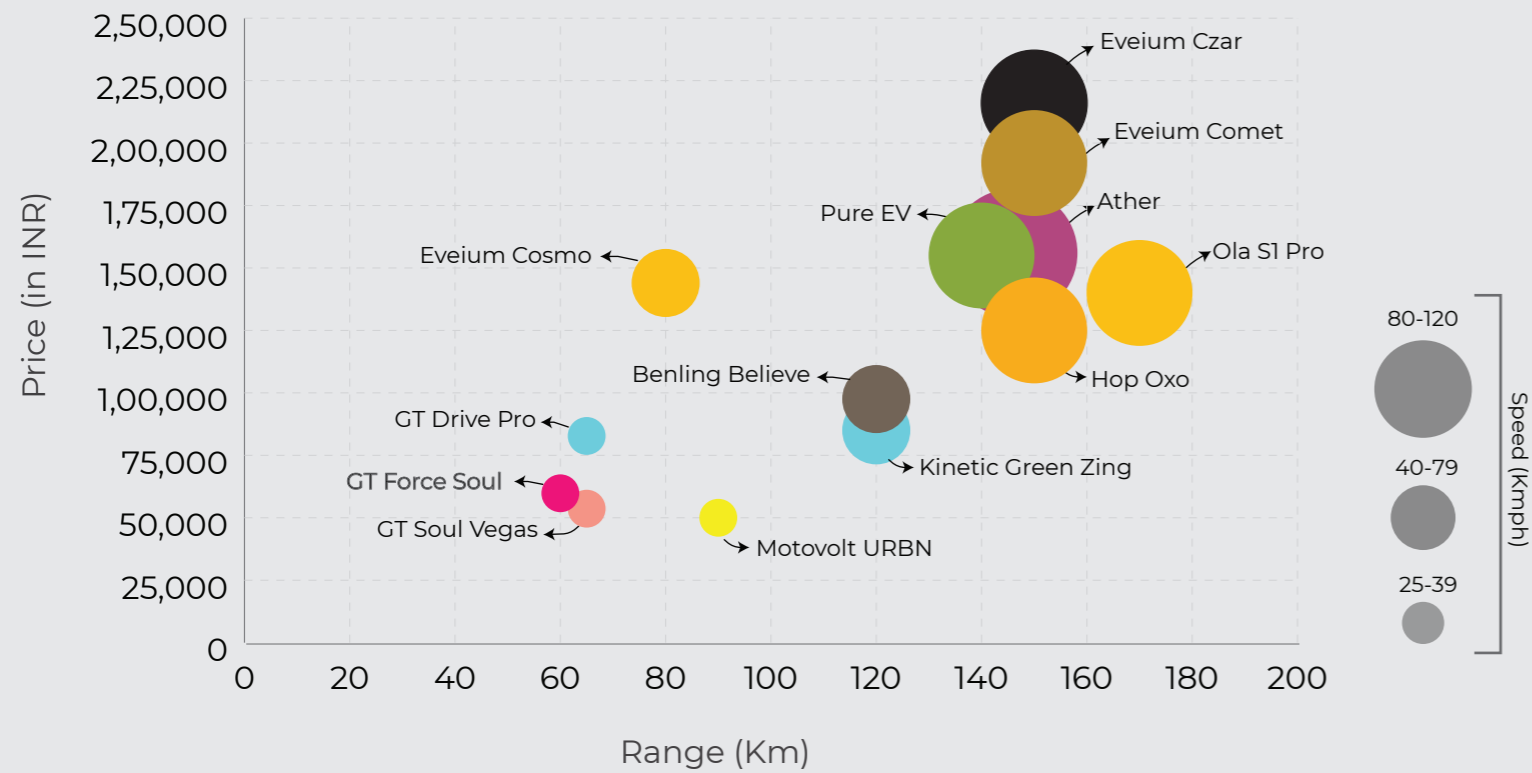
(As of Sept, 30 2022)

| Company Name | Number of AC Charge Points | | Number of DC (basis vehicle category) Charge Points | | Total Number of Charge Points |
|-------------------------|----------------------------|---------|---|-----|-------------------------------|
| | AC001 | Type-II | 2W | 4W | |
| Bolt | 13,581 | 421 | - | 79 | 14,081 |
| Statiq | 5,900 | 546 | - | 631 | 7,077 |
| Charge+Zone | | | | | 3,163 |
| Tata Power | | | | | 2,600+ |
| Volttic | 160 | 84 | 8 | 199 | 451 |
| Ather | | | | | 450+ |
| EVI Technologies | | | | | 437 |
| Fortum | 0 | 76 | 0 | 179 | 255 |
| BPCL | 18 | - | - | 59 | 77 |

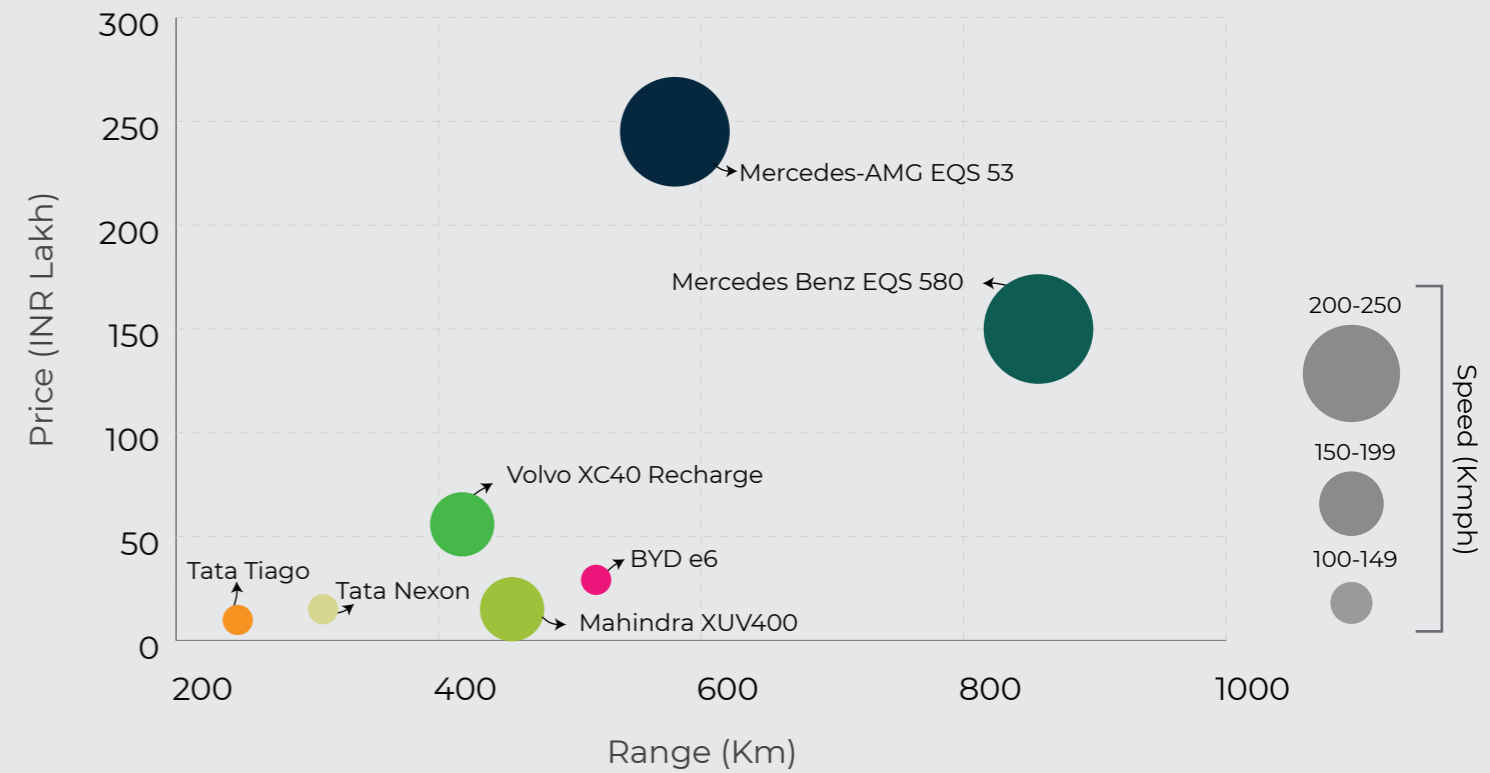
Note: Split of charge point count not available for Charge+Zone, Tata Power, and EVIT; the count excludes Tata Power's 21,000+ Home chargers (for private use). Rest of the CPOs/OMCs have not shared their numbers, hence not included

NEW PRODUCT LAUNCHES

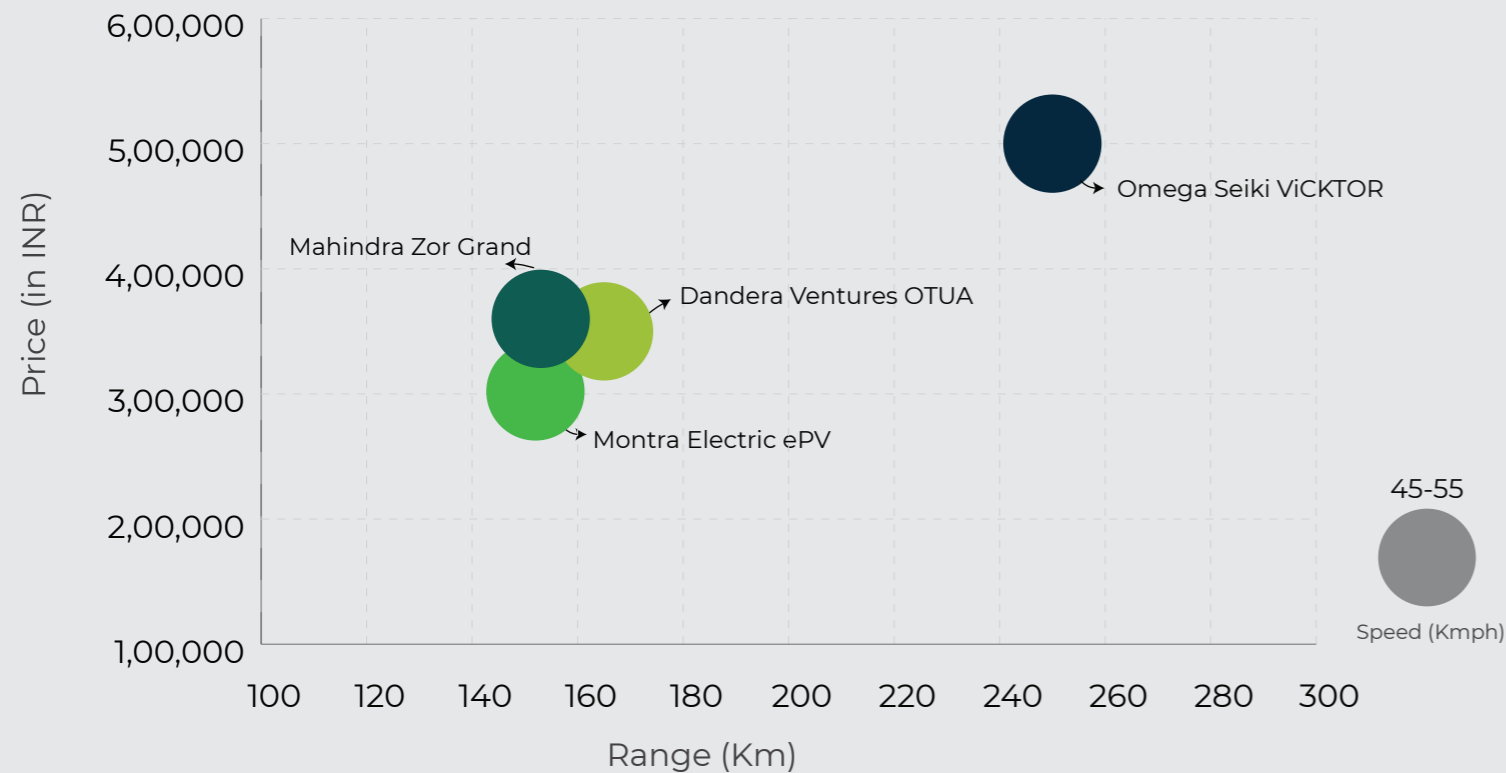
NEW E2W MODELS LAUNCHED IN Q3 2022



NEW E-CAR MODELS LAUNCHED IN Q3 2022



NEW E3W MODELS LAUNCHED IN Q3 2022



INDIA EV MARKET CONCLAVE 2

Meet the Leaders

Friday, Nov 18 2022, 9:30 am-5:00 pm
 📍 Hyatt Regency, Bhikaji Cama Place, New Delhi

Lead Sponsor

Associate Sponsor

Supported By

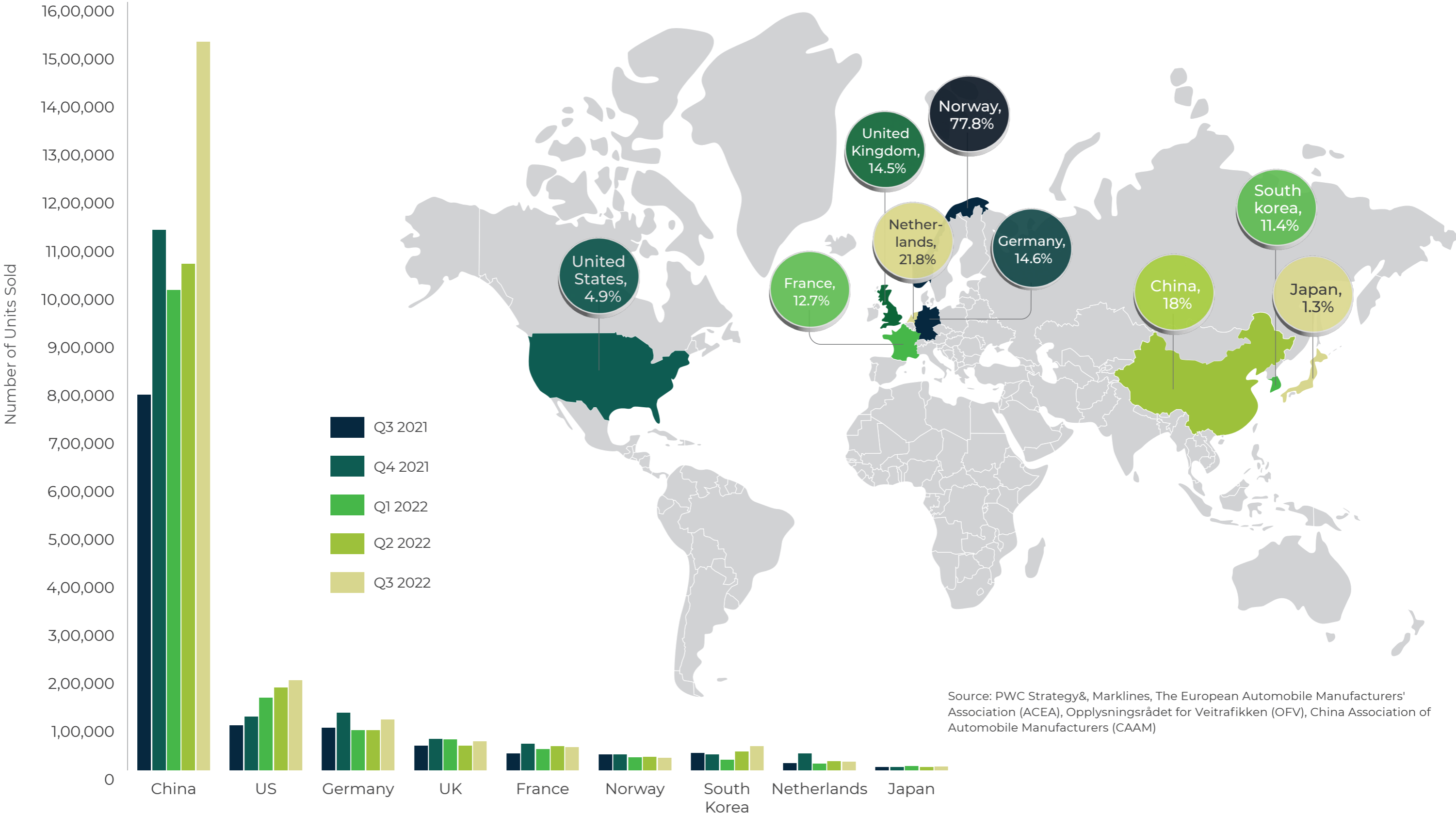
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GLOBAL SALES TRENDS

REGION-WISE REGISTERED BATTERY ELECTRIC VEHICLES (BEV) SALES IN Q3 2022

BEV MARKET SHARE (%AGE OF BEV REGISTRATIONS OUT OF THE TOTAL VEHICLE REGISTRATIONS IN Q3 2022)



Source: PWC Strategy&, Marklines, The European Automobile Manufacturers' Association (ACEA), Opplysningsrådet for Veitrafikken (OFV), China Association of Automobile Manufacturers (CAAM)



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