

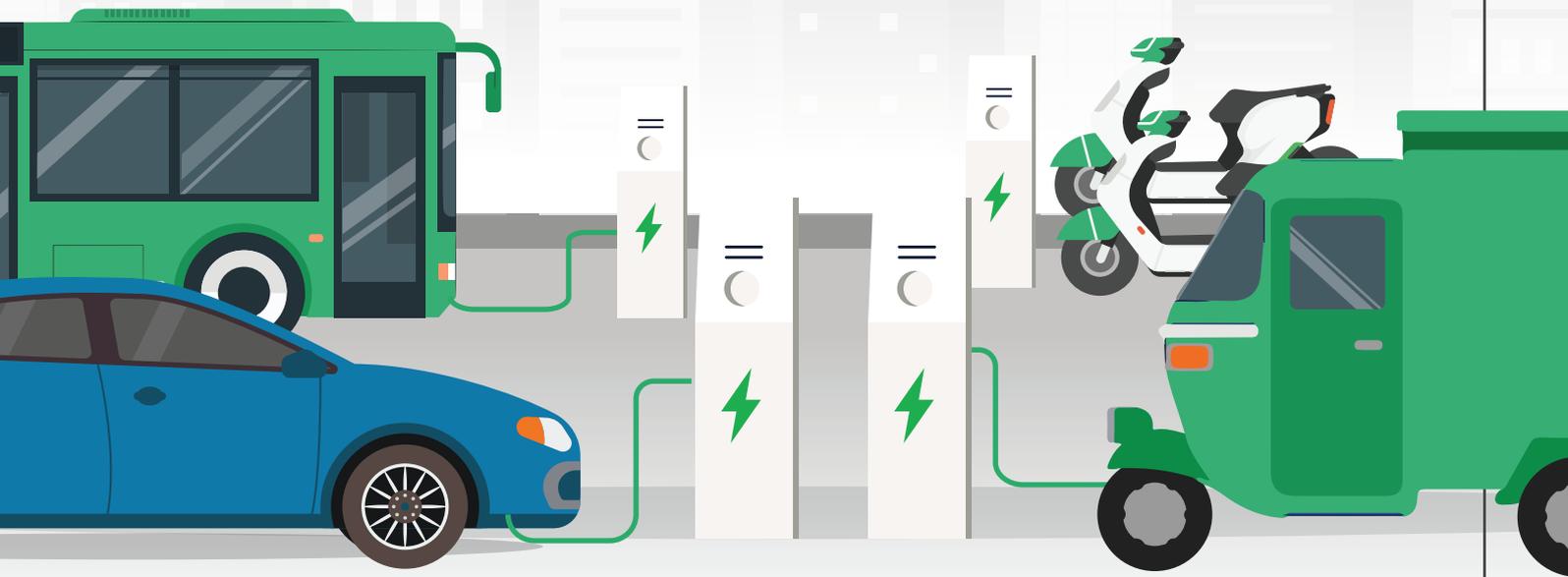
# Top 5 States' EV ADOPTION TRENDS in India



Whitepaper

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**Bourbon80 2+8  
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**Mate60 2+1+5  
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# TABLE OF CONTENTS

## 1. OVERALL INDIA EV LANDSCAPE

## 2. UTTAR PRADESH

- 2.1 Sales and EV Penetration
- 2.2 Key Drivers for EV Growth in Uttar Pradesh
  - 2.2.1 Subsidies Disbursed UNDER FAME-II
  - 2.2.2 Charging Infrastructure Landscape
  - 2.2.3 Investments in Uttar Pradesh

## 3. MAHARASHTRA

- 3.1 Sales and EV Penetration
- 3.2 Key Drivers for EV Growth in Maharashtra
  - 3.2.1 Subsidies Disbursed UNDER FAME-II
  - 3.2.2 Charging Infrastructure Landscape
  - 3.2.3 Investments in Maharashtra

## 4. KARNATAKA

- 4.1 Sales and EV Penetration
- 4.2 Key Drivers for EV Growth in Karnataka
  - 4.2.1 Subsidies Disbursed UNDER FAME-II
  - 4.2.2 Charging Infrastructure Landscape
  - 4.2.3 Investments in Karnataka

## 5. TAMIL NADU

- 5.1 Sales and EV Penetration
- 5.2 Key Drivers for EV Growth in Tamil Nadu
  - 5.2.1 Subsidies Disbursed UNDER FAME-II
  - 5.2.2 Charging Infrastructure Landscape
  - 5.2.3 Investments in Tamil Nadu

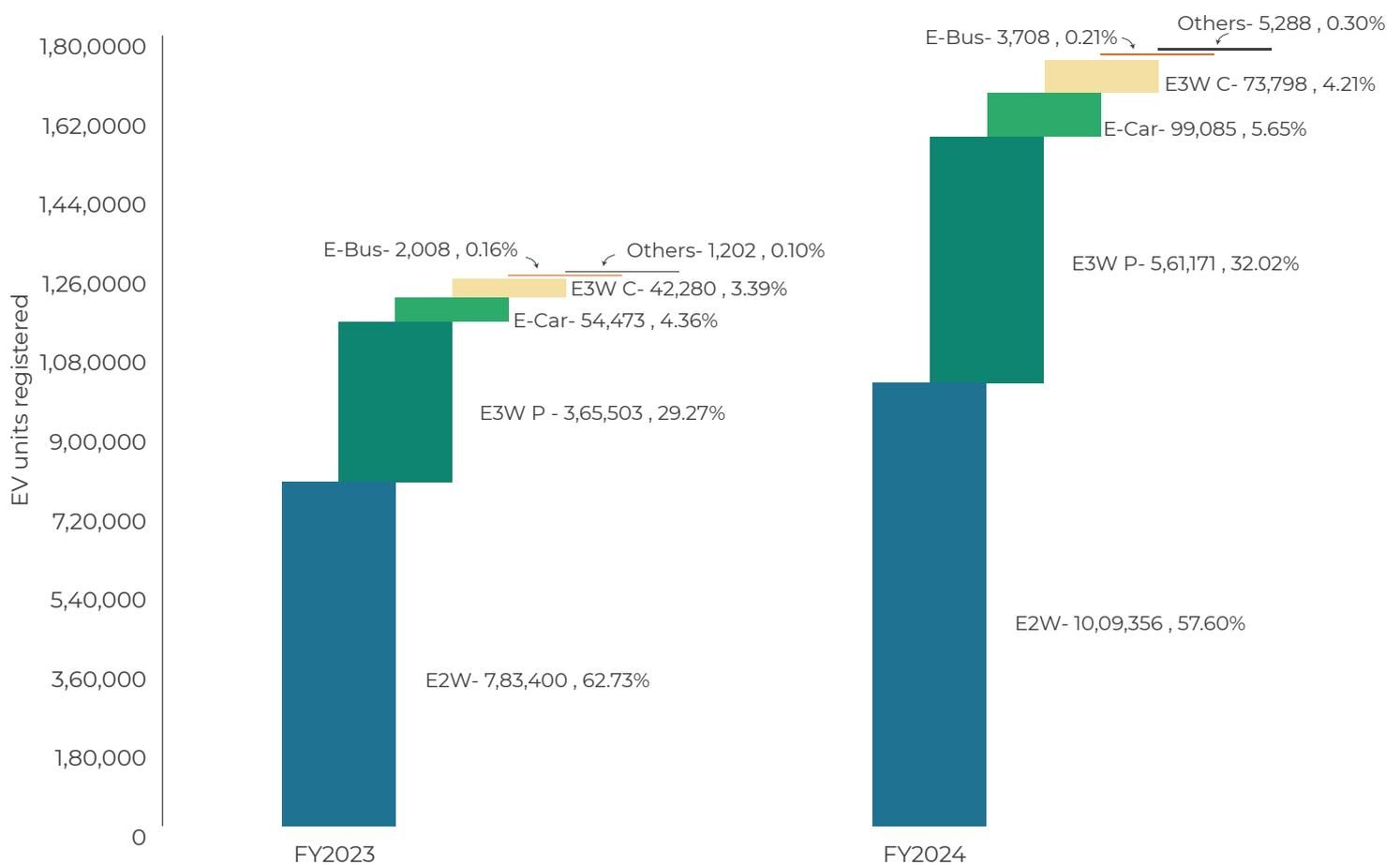
## 6. RAJASTHAN

- 6.1 Sales and EV Penetration
- 6.2 Key Drivers for EV Growth in Rajasthan
  - 6.2.1 Subsidies Disbursed UNDER FAME-II
  - 6.2.2 Charging Infrastructure Landscape
  - 6.2.3 Investments in Rajasthan

# 1. OVERALL INDIA EV LANDSCAPE

In FY2024, India witnessed a significant surge in electric vehicle (EV) sales, reaching a total of **17,52,406** units, marking a robust year-on-year (y-o-y) growth of 40.31% compared to the previous fiscal year. This growth is led primarily by E2Ws (Electric Two Wheelers) and E3Ws (Electric Three Wheelers) which contributed 94% of the total EV sales across all categories for FY2024

**Figure 1.1: Segment wise EV units registered**

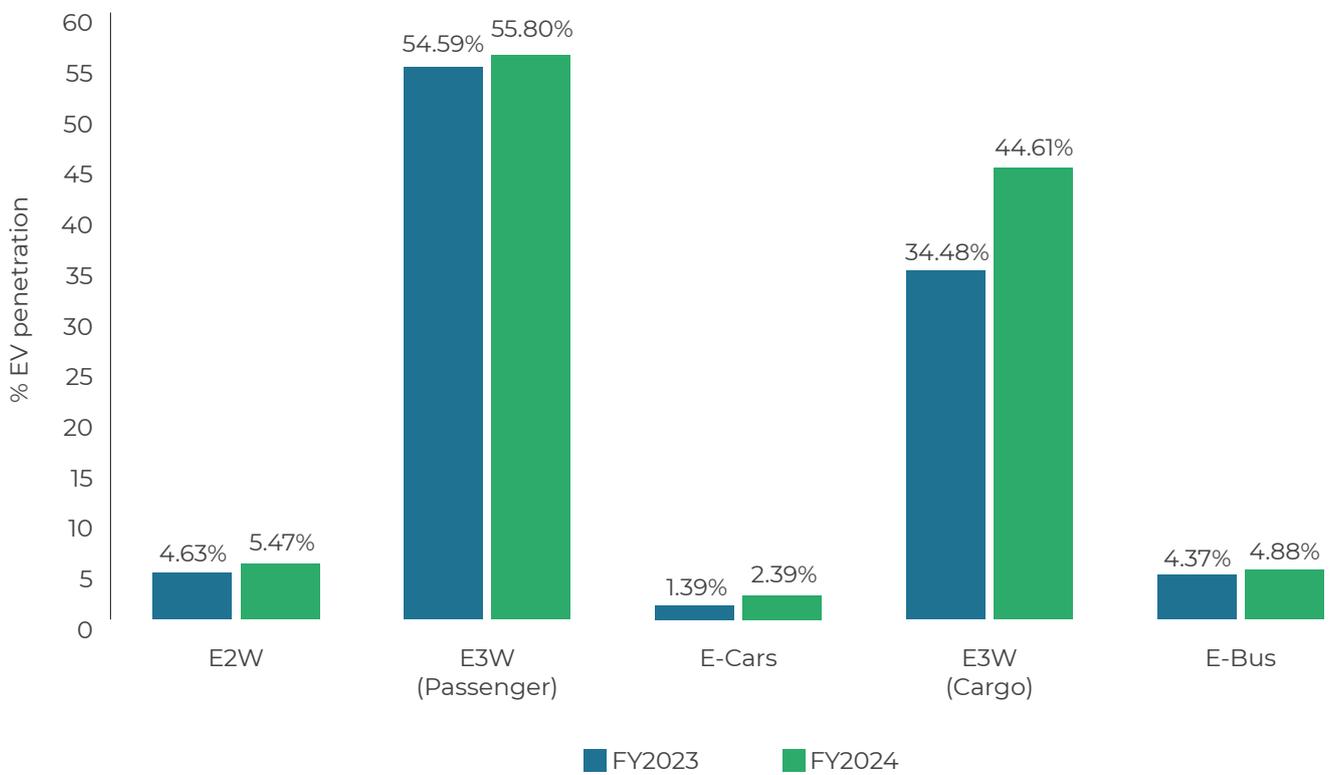


Source: [Vahan Dashboard](#), [Telangana Dashboard](#), [JMK Research](#)

- E2Ws emerged as the frontrunners, with sales totalling 10,09,356 units indicating a notable y-o-y growth of 29%, from FY2023, constituting a substantial 57.60% share of the overall EV sales in FY2024. The rise in E2W penetration in FY2024 was mainly attributed to increased awareness and the introduction of improved product models that are comparable to ICE vehicles.
- E3Ws (Passenger and cargo), showcased a remarkable 56% y-o-y growth, registering sales of 6,34,969 units in FY2024. E3W stands out as the most electrified segment with overall 52.34% EV penetration in the 3W category. Favourable cost economics, increasing logistic demand and enhanced demand for last mile mobility has driven growth in the segment.

- The Electric Car (E-Car) category, sales reached 99,085 units, indicating a remarkable y-o-y growth of ~82% in FY2024. Since the inception of E-Cars, the adoption rate within the category has been sluggish, largely due to insufficient policy backing and a limited variety of models available in this segment.
- Lastly, the Electric Bus (E-Bus) category demonstrated the highest y-o-y growth of ~85%, with sales totalling 3,708 units during FY2024. However, despite this consistent upward trend in sales since FY2021, the level of electrification penetration has remained relatively unchanged over the past few years. This is primarily due to the concurrent increase in the number of ICE buses in the country, maintaining a proportional balance.

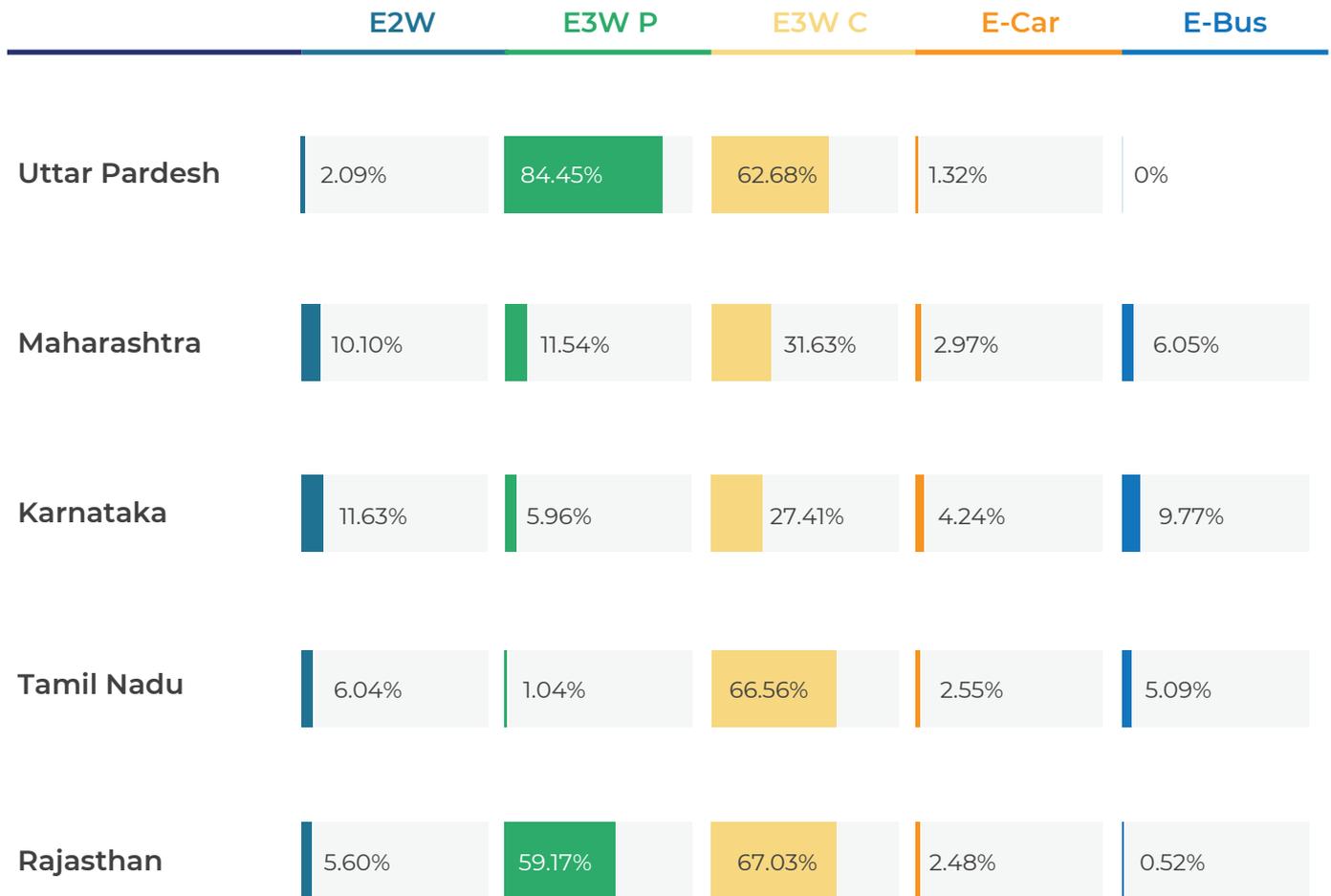
**Figure 1.2: EV penetration across different segments**



Source: [Vahan Dashboard](#), [Telangana Dashboard](#), [JMK Research](#)

## EV PENETRATION ACROSS STATES

Figure 1.3: EV Penetration across Top 5 states in different segments in FY 2024



Source: [Vahan Dashboard](#), [JMK Research](#)

- In FY2024, Karnataka leads in the E2W penetration rate with 11.63%, the E-Car category with 4.24% electrification, and the E-Bus category with 9.77% among the top 5 states.
- Uttar Pradesh has the highest 3W Passenger electrification rate among the top 5 states, with approximately 84% of the category electrified.
- Rajasthan, Tamil Nadu, and Uttar Pradesh have each surpassed 60% electrification in the 3W Cargo category in FY2024.

## 2. UTTAR PRADESH

Uttar Pradesh has emerged as a leader in India's EV market largely propelled by its dominant position in the E3W category with sales of **2,46,273** units in FY2024, capturing a substantial ~39% E3W market share in India.

### 2.1 SALES AND EV PENETRATION

In FY2024, the total EV sales in the state clocked 3,05,355 units which is **17.42%** of the overall EV sales in the country. In comparison to FY2023, the state has shown a y-o-y growth of ~62% in FY2024.

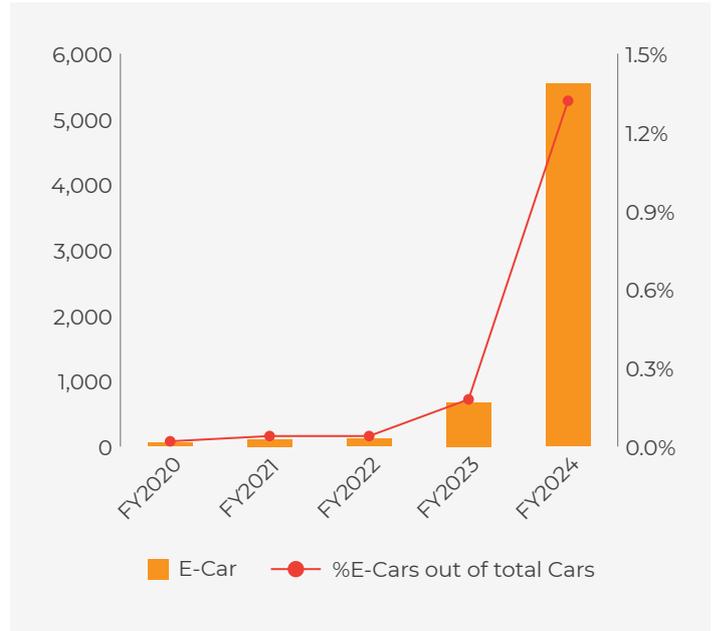
Within the state's EV market for FY2024, **E3W Passenger** vehicles emerged as the frontrunner, commanding a significant ~**75%** share, followed by **E2W** at **17%**, **E3W Cargo** at **6%**, and **E-Cars** capturing a mere **2%** share.

In FY2024, EVs accounted for approximately 9% of total vehicle sales (combining both ICE and EV) in Uttar Pradesh, marking a notable increase of nearly 3% compared to the previous fiscal year. The state hosts not only E3Ws but also encompasses highest number of three-wheelers across all fuel types. The penetration rate of E3W passenger vehicles in the state has soared to approximately 84% in FY2024, primarily propelled by the growing demand for last-mile mobility solutions. In the three-wheeler cargo segment, electrification percentage increased by 18% which is maximum growth seen amongst all the segments.

While the state has experienced significant uptake in E3W vehicles, its EV penetration percentages in the two wheeler and Car segments remain relatively low at 2.09% and 1.32% respectively.

**Figure 2.1: Segment wise EV sales trends in Uttar Pradesh**



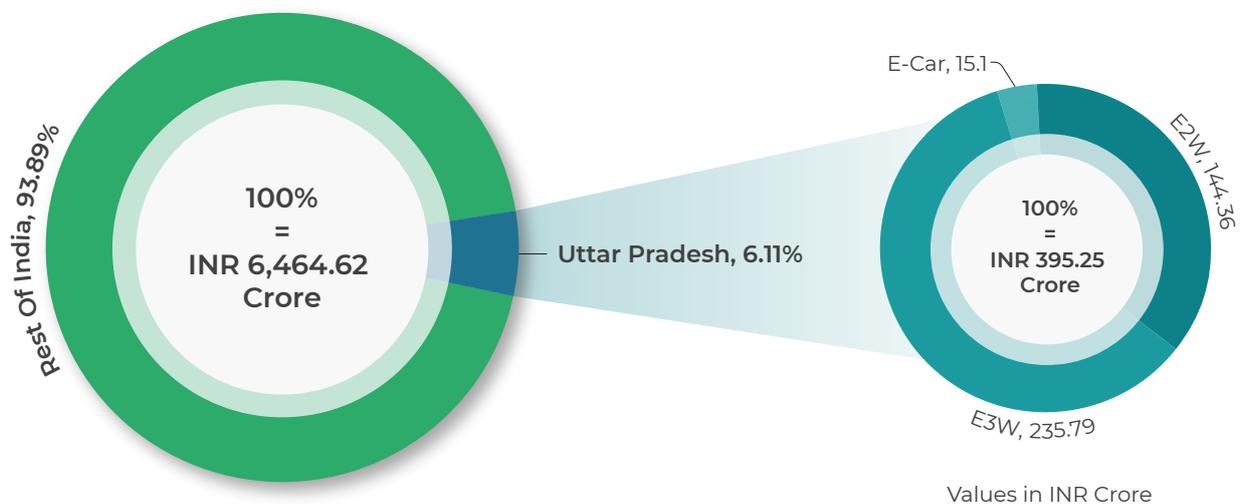


Source: Vahan Dashboard, JMK Research

## 2.2 KEY DRIVERS

### I. SUBSIDIES DISBURSED UNDER FAME-II

Uttar Pradesh has been one of the top beneficiaries of FAME II scheme. As on May 2024, the state has availed subsidies worth more than INR 395 crores which is ~6% of total subsidies disbursed nationwide under FAME II.

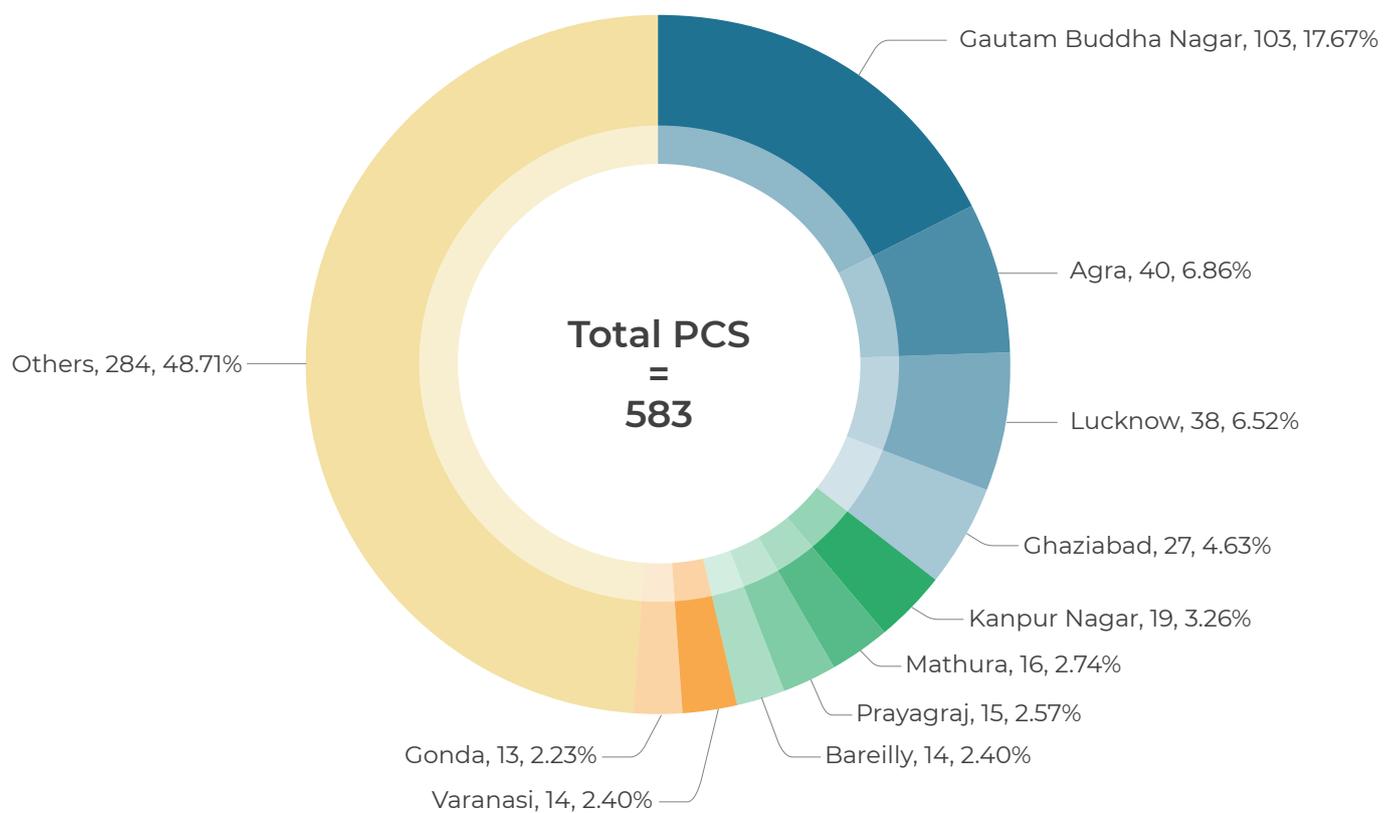


Source: Ministry of Heavy Industries, FAME-II Dashboard

## II. CHARGING INFRASTRUCTURE LANDSCAPE

To support EV penetration, the state administration is also now actively engaging in enhancing the charging infrastructure in the state. As of May 2024, the state boasts 583 public charging stations (PCS) which is 3.57% of the nationwide total.

**Figure 2.2: District wise Public Charging Stations in Uttar Pradesh**

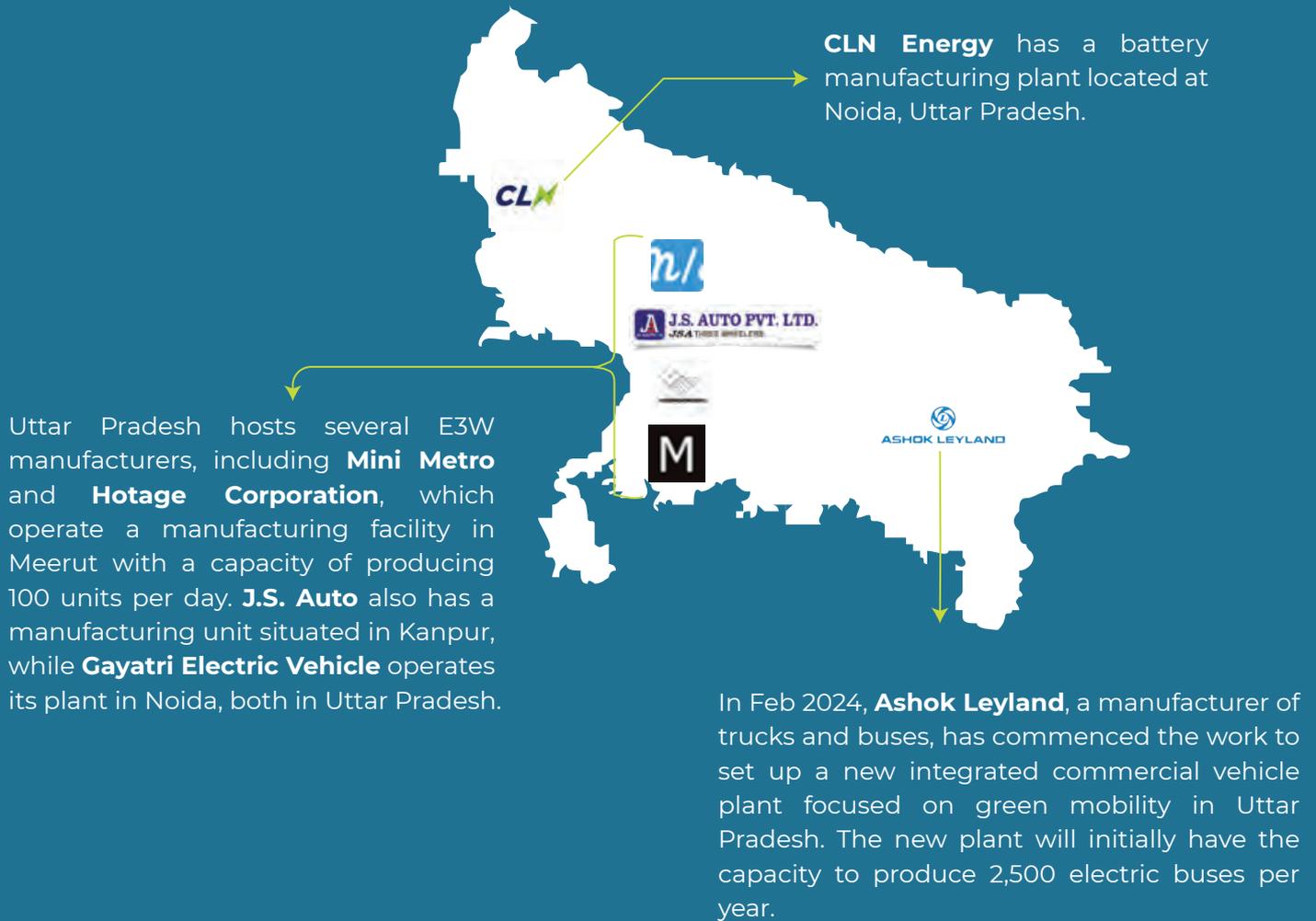


Source: JMK Research, Bureau of Energy Efficiency

Although Uttar Pradesh ranks lower in charging infrastructure compared to other states, it leads in EV sales. This is mainly because of the widespread use of E3Ws, which are generally charged using simple 3-pin or 16A charging plugs.

### III. INVESTMENTS IN UTTAR PRADESH

Uttar Pradesh is home to various E3W manufacturers which is another reason behind massive sales of E3Ws in the state.



Source: News Articles, Company Website, JMK Research

# 3. MAHARASHTRA

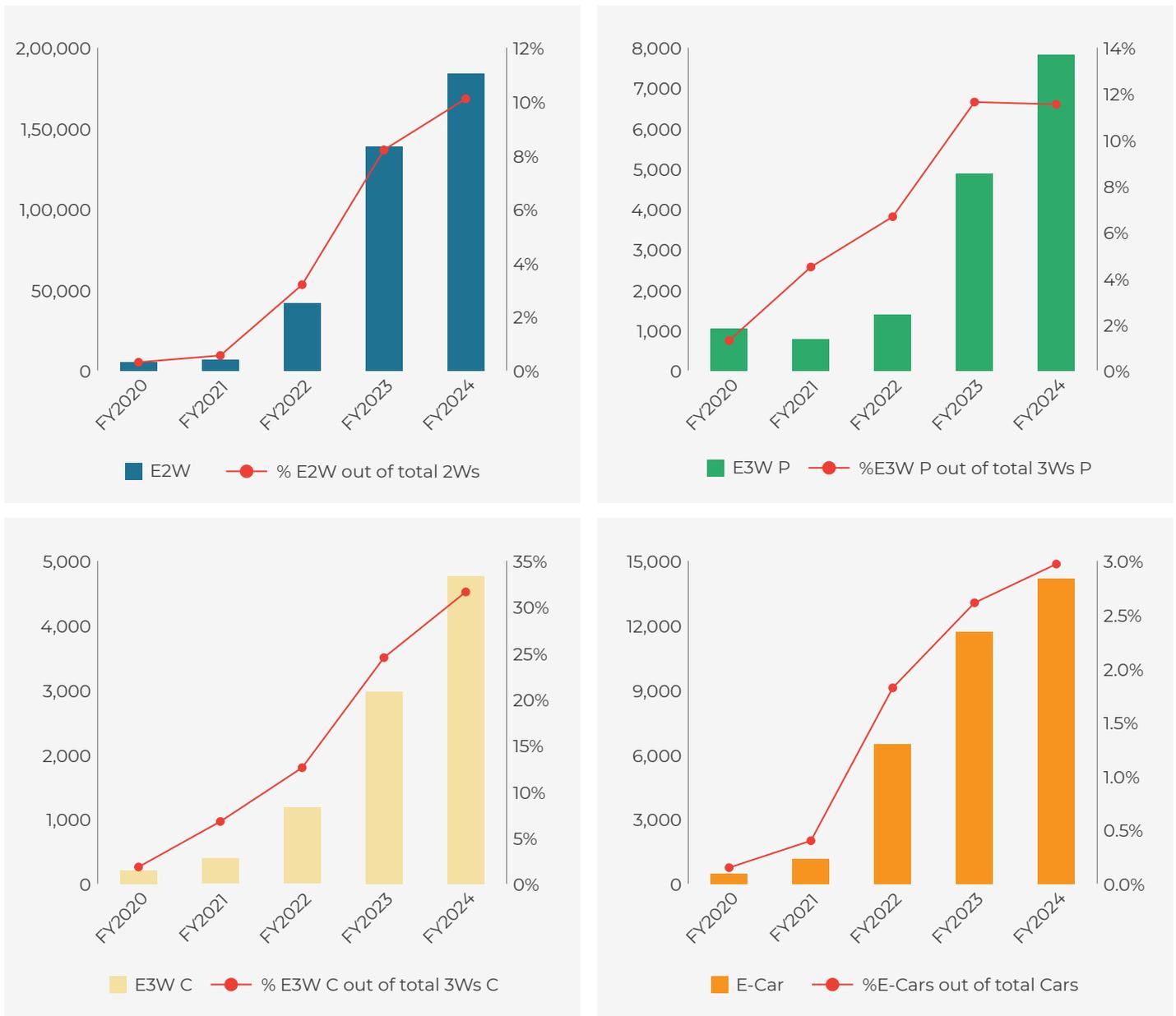
Maharashtra achieved the second-highest EV sales in India, contributing ~12% of the country's EV sales total EV sales with **2,12,352** units sold in FY2024.

## 3.1 SALES & EV PENETRATION

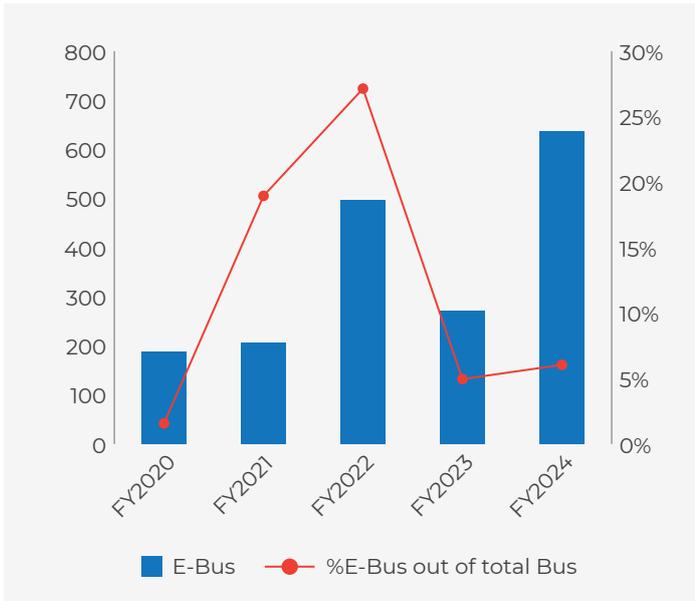
Maharashtra leads the race in the E2W and E-Cars category. Of the 1.09 million E2W units sold in India in FY2024, Maharashtra with 1,83,879 units holds ~18% share in the category. Likewise in E-Cars category, the state tops with 14,143 units and ~14% market share.

Exploring the characteristics of EV sales in Maharashtra for FY2024, **E2Ws** dominate the market with **86.59%** share followed by **E-Car (6.68%), E3W (5.93%)** and **E-Bus (0.30%)**.

Figure 3.1: Segment wise EV sales trends in Maharashtra



Source: Vahan Dashboard, JMK Research



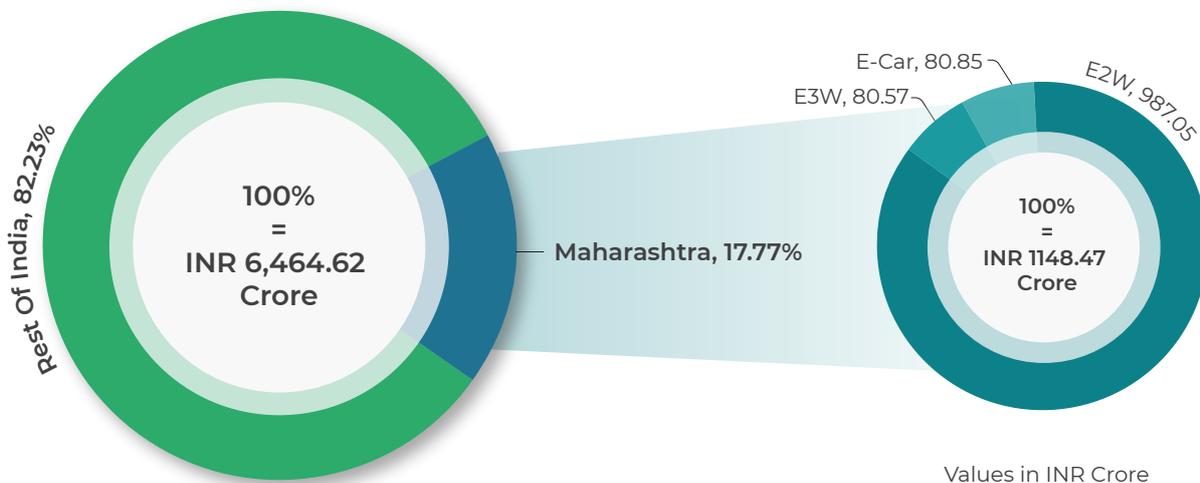
The Maharashtra EV policy aims for a 10% EV adoption rate by 2025. In the fiscal year 2024, EVs comprised 8.12% of total vehicle sales in the state, indicating a promising trend toward achieving the specified goal within the established timeline. The state boasts the highest number of electric cars in the country, primarily due to the extensive presence of electric cabs and robust public charging network in the state. Despite significant sales in the E-Car category, the state achieved only a 2.97% adoption rate for E-Cars in FY2024. While Maharashtra holds the second-highest rank in the ICE three-wheeler segment, it trails in the E3W passenger segment due to prevailing buyer preferences for diesel and

CNG autos. However, the 3W cargo segment has the highest increase in electrification percentage, with a 7.12% rise in FY2024. With a focus on electrifying the bus sector, the government has propelled the state to the second position in E-Bus sales, with 636 units and recording a 6.05% EV electrification rate in this category.

## 3.2 KEY DRIVERS

### I. SUBSIDIES DISBURSED UNDER FAME-II

As of May 2024, Maharashtra has availed subsidy worth more than INR 1,148 crores which is 17.75% of total subsidy disbursed nationwide under FAME II.

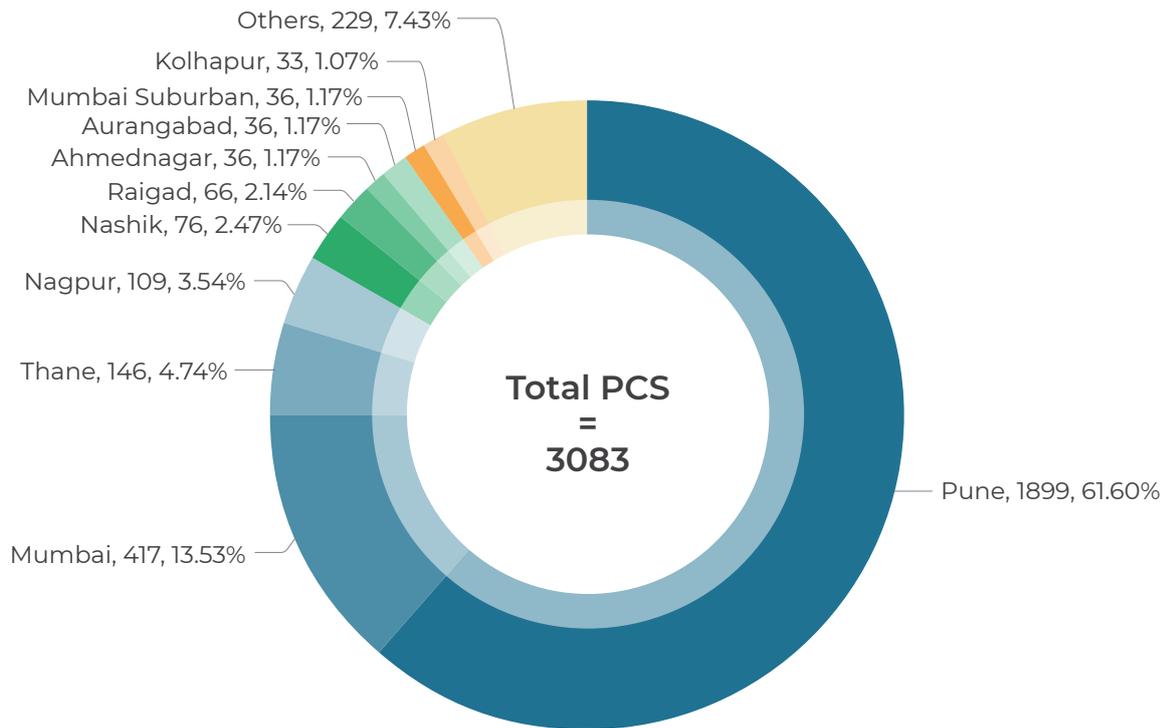


Source: Ministry of Heavy Industries, FAME-II Dashboard

## II. CHARGING INFRASTRUCTURE LANDSCAPE

As of May 2024, the state has **3,083 public EV charging stations**, the second highest number in the country. This is approximately 19% of the total PCSs nationwide<sup>5</sup>.

**Figure 3.2: District wise Public Charging Stations in Maharashtra**



Source: *JMK Research, Bureau of Energy Efficiency*

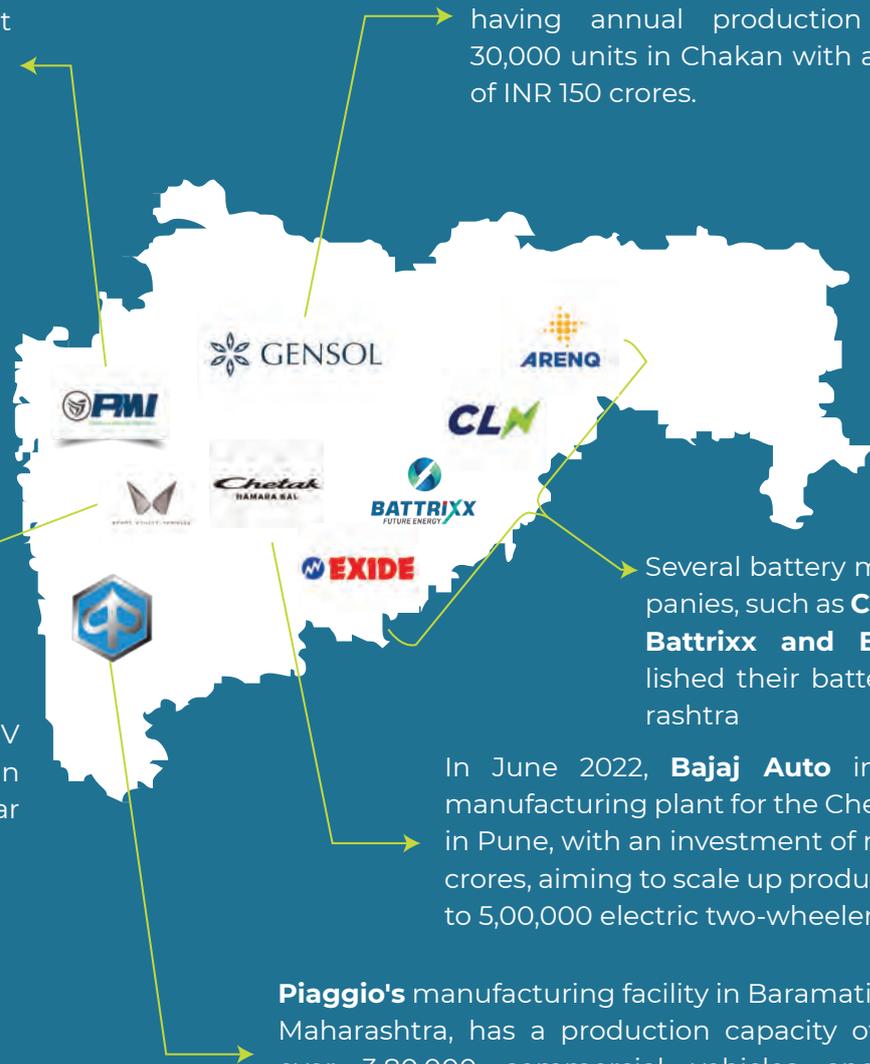
Pune and Mumbai together host more than 75% of the overall public charging stations in the state. This can be attributed to the city's better connectivity with highways.

### III. INVESTMENTS IN MAHARASHTRA

Maharashtra has become a hub for EV and battery manufacturers, attracting significant investments, thereby boosting the state's role in the EV industry.

In May 2022, **PMI Electromobility** has set up a manufacturing plant in Pune with an annual production capacity of 4,000 commercial vehicles.

In November 2023, **Gensol EV** had launched a state-of-the-art manufacturing facility having annual production capacity of 30,000 units in Chakan with an investment of INR 150 crores.



Several battery manufacturing companies, such as **CLN Energy, ARENQ, Battrixx and Exide**, have established their battery plants in Maharashtra

**Mahindra** has setup 2 EV manufacturing plants in Nashik and Chakan, near Pune.

In June 2022, **Bajaj Auto** inaugurated a manufacturing plant for the Chetak E-Scooter in Pune, with an investment of nearly INR 750 crores, aiming to scale up production capacity to 5,00,000 electric two-wheelers annually.

**Piaggio's** manufacturing facility in Baramati, Maharashtra, has a production capacity of over 3,80,000 commercial vehicles and 1,50,000 two-wheelers, catering to various fuel types.

Source: News Articles, Company Website, JMK Research

These substantial investments by the leading manufacturers in Maharashtra are driving the expansion and advancement of the electric vehicle industry in the state, positioning it as a key player in the national EV market.

# 4. KARNATAKA

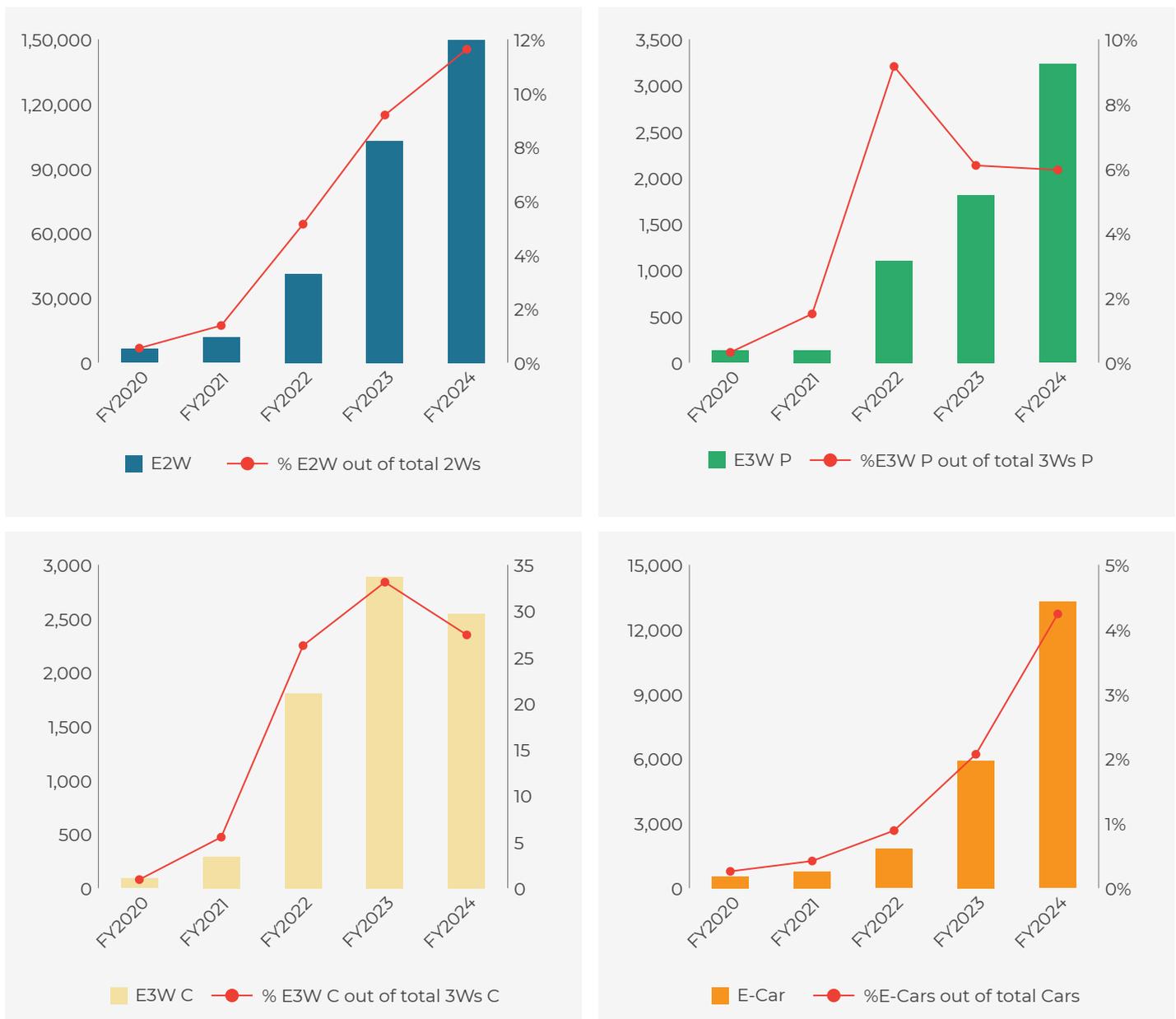
Karnataka emerged as the third-largest contributor to India's EV sales in FY2024, with sales of **1,69,826** units, accounting for **9.66%** of the national total EV sales.

## 4.1 SALES & EV PENETRATION

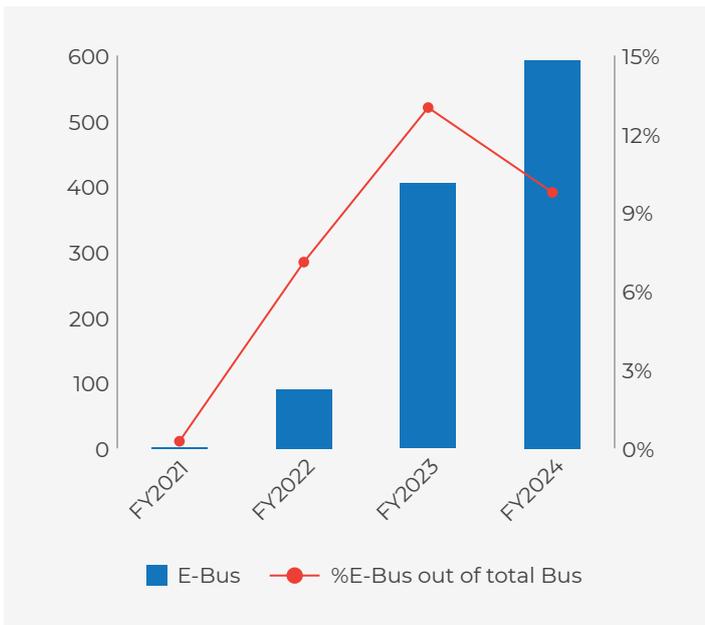
In FY2024, Karnataka secured the second rank in E2W category with 1,49,767 units sold, representing a 15% share of the market. The state also ranked second in E-Cars with 13,288 units sold, capturing a ~13% market share, and third in E-Buses with 593 units sold, constituting a 16% share. However, Karnataka lagged in the electric three-wheeler (E3W) category, with only 5,778 units sold.

The market landscape in FY2024 reveals that **E2Ws** command a substantial **88.19%** market share, with **E-Cars** following at **7.82%**, trailed by **E3Ws** at **3.40%**, and **E-Buses** at **0.35%**.

Figure 4.1: Segment wise EV sales trends in Karnataka



Source: [Vahan Dashboard](#), JMK Research



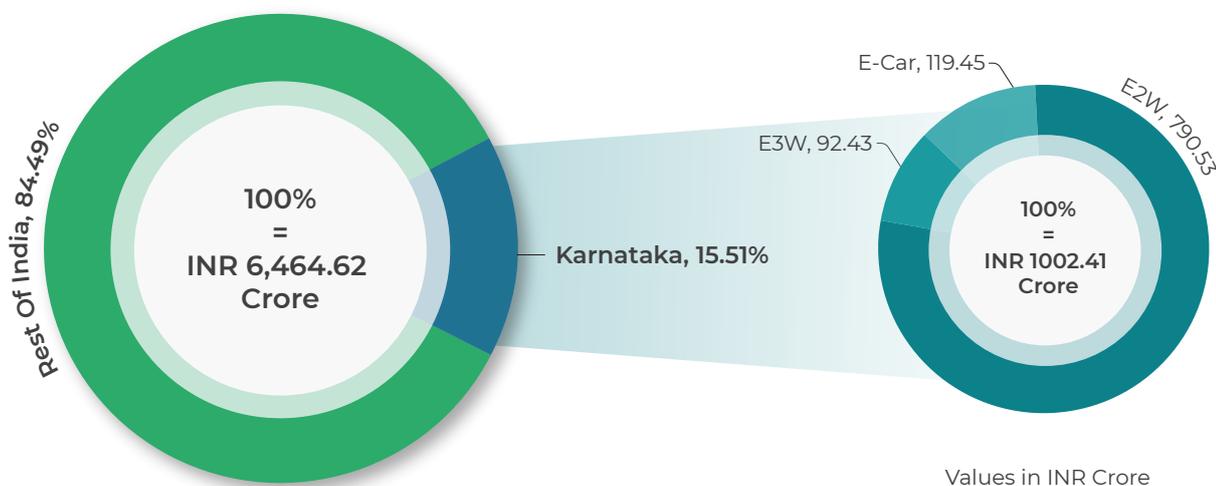
In FY2024, E-Cars have experienced an impressive 124% y-o-y growth. The E4W category in the state has secured subsidies totalling 119 crores under FAME II, ranking second only to Delhi in subsidy utilization<sup>6</sup>. Additionally, the E3W passenger segment has demonstrated a noteworthy 79% y-o-y growth, attributed to the rising demand for last-mile mobility solutions. Notably, the state government's emphasis on electrifying public transport, particularly buses, has contributed to the substantial 46% y-o-y growth in the E-bus category. However, the E3W cargo segment stood out as the only segment with negative y-o-y growth during the fiscal period. This was accompanied by a reduction in penetration

percentage from approximately 33% in FY2023 to around 27% in FY2024, primarily due to the increased presence of ICE 3W cargo vehicles during this period.

## 4.1 KEY DRIVERS

### I. SUBSIDIES DISBURSED UNDER FAME-II

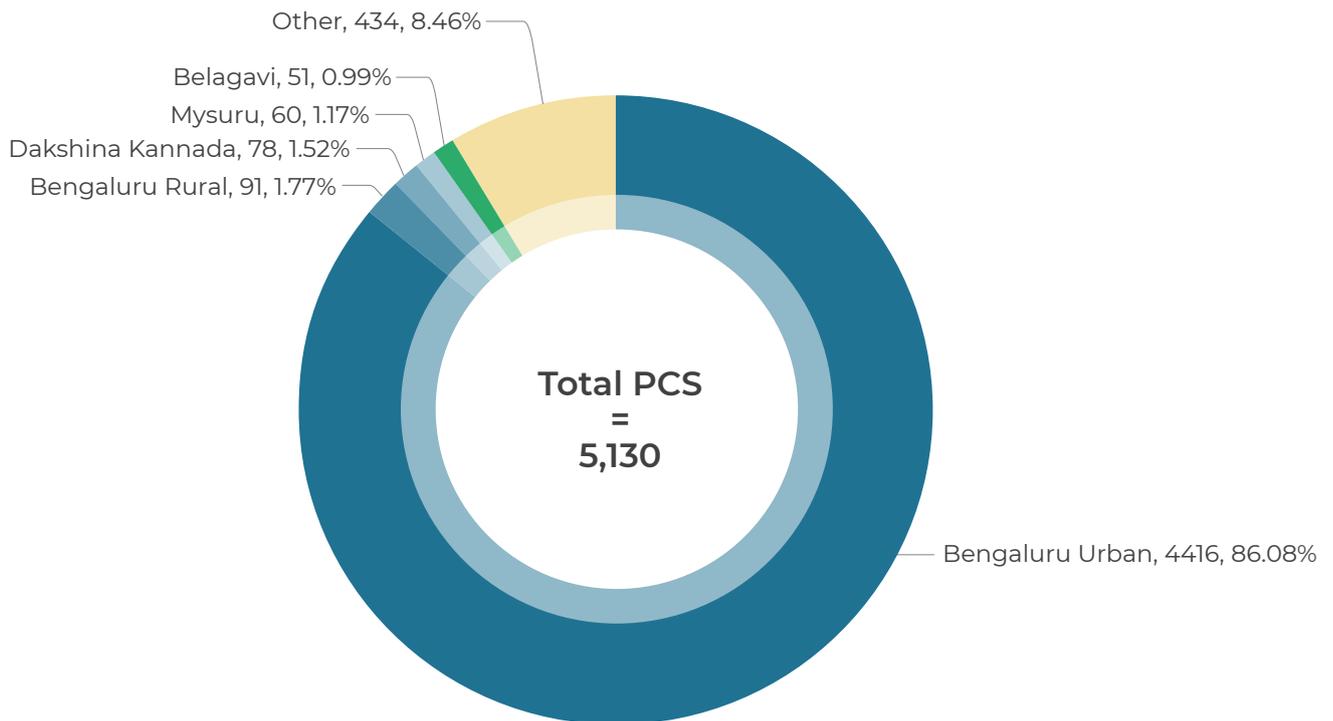
As of May 2024, Karnataka has effectively utilized the FAME-II subsidy program by securing subsidies worth over INR 1,002 crores which is approximately 15% of the total subsidies disbursed nationwide.



## II. CHARGING INFRASTRUCTURE LANDSCAPE

As on May 2024, Karnataka is leading the charge with 5,130 operational PCS which is 31.38% of the nationwide total. Karnataka's dominance in charging infrastructure aligns with its high sales of E2Ws and E-Cars.

**Figure 4.2: District wise Public Charging Stations in Karnataka**



Source: JMK Research, Bureau of Energy Efficiency

### III. INVESTMENTS IN KARNATAKA

In November 2018, **Mahindra's EV brand, +ME**, has established a new technology hub dedicated to manufacturing essential components of electric powertrains. This facility, built with an investment of INR 100 crore, will produce battery packs, power electronics, and motor assemblies.

In November 2022, **Altigreen's** has setup E3W manufacturing plant and warehouse facility, with an annual capacity of 55,000 units in Malur, Karnataka with an investment of INR 80 crores.

Karnataka is home to top E2W manufacturers **Ola Electric, Ultraviolette** and **Ather Energy**.

**Log9** Materials has battery manufacturing plant of capacity 50 MWh located in Bangalore, Karnataka .

In August 2023, **River** started production from its manufacturing plant located in Hoskote, Karnataka and produce 100,000 units annually.

Home Presence of EV charging companies including **Exponent Energy** and **Bolt Earth** and battery swapping company **Sun Mobility**.



Source: News Articles, Company Website, JMK Research

With a 9.34% EV adoption rate in FY2024, Karnataka is demonstrating its commitment to significantly accelerate EV adoption within the state, While setting a precedent for sustainable transportation initiatives across the country.

# 5. TAMIL NADU

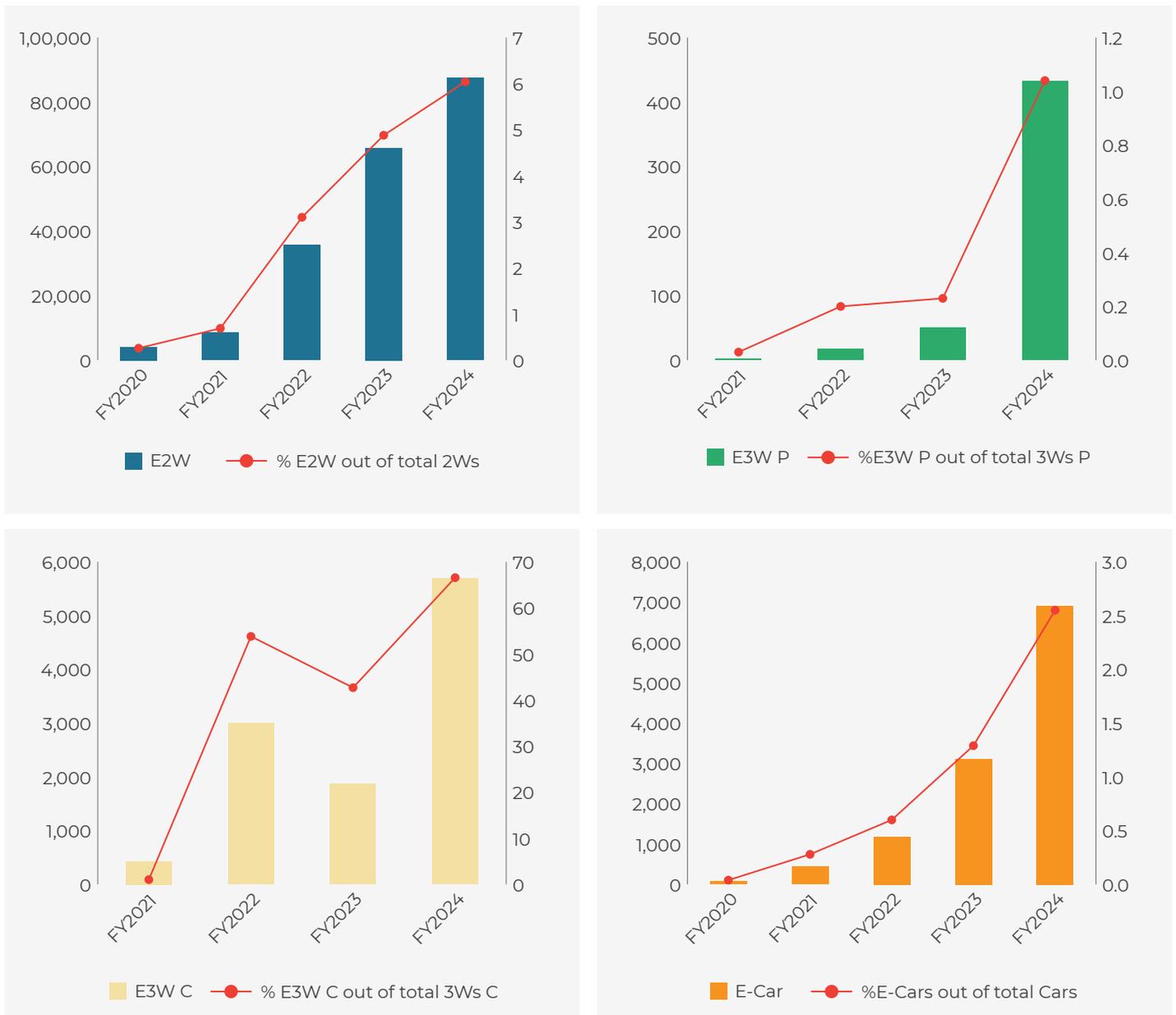
Tamil Nadu ranks fourth in EV sales, with **1,01,204 units** registered in FY2024, constituting ~ **6%** of the total EV sales in India.

## 5.1 SALES & EV PENETRATION

The state has exhibited a ~**41%** y-o-y growth in EV sales during FY2024. It ranks third in the E2W category, with 87,402 registered units, constituting an 8.66% share during the fiscal year.

In the market analysis for FY2024, **E2Ws** dominated with a commanding share of **86.36%** of total sales. Followed by **E-Cars** at **6.83%**, then **E3W cargo** vehicles at **5.63%**, and finally E3W passenger vehicles at a mere **0.43%**.

Figure 5.1: Segment wise EV sales trends in Tamil Nadu

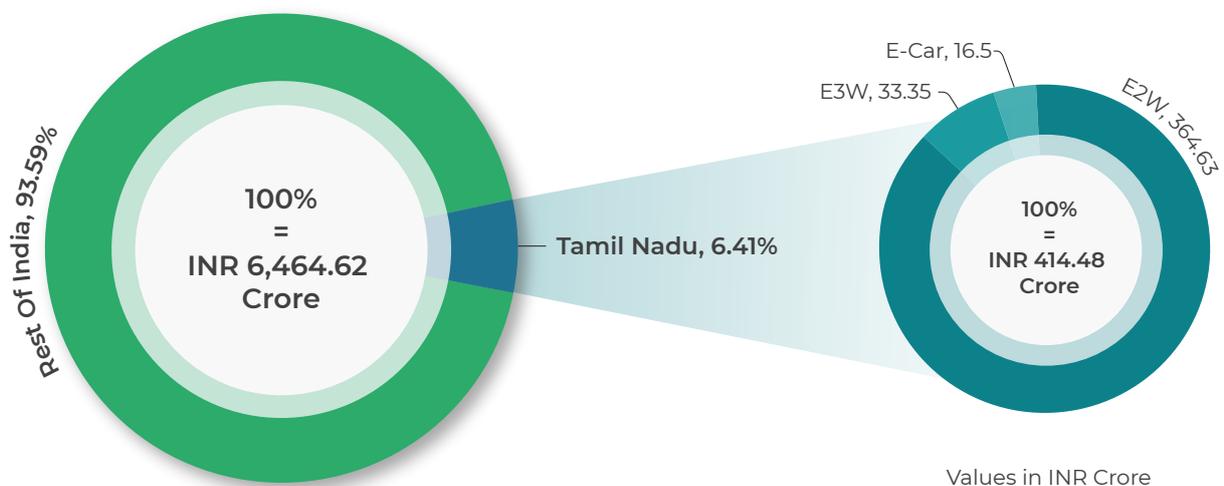


In FY2024, overall EV adoption in Tamil Nadu increased to 5.36% which was almost 4% in previous fiscal year. Buyer preferences in the state heavily favour personal mobility options, such as E2Ws and E-Cars, leading to a limited adoption of E3W passenger vehicles. However, due to favourable cost economics, the E3W Cargo segment experienced a remarkable surge of approximately 24% in electrification percentage, surpassing all other categories in FY2024. The popularity of E-Cars in the state is notable, contributing approximately 7% to the total E-Car sales in the country. The Tamil Nadu state government has the opportunity to prioritize the electrification of public transportation. In FY2024, 80 E-Buses were registered in the state, marking a significant increase from the absence of bus sales in previous fiscal years.

## 5.2 KEY DRIVERS

### I. SUBSIDIES DISBURSED UNDER FAME-II

Tamil Nadu has availed subsidies amounting to INR 414 crore under the FAME-II scheme, accounting for 6.40% of the total subsidies distributed nationwide. The majority of this subsidy, INR 364 crore, was utilized in the electric two-wheeler (E2W) category.

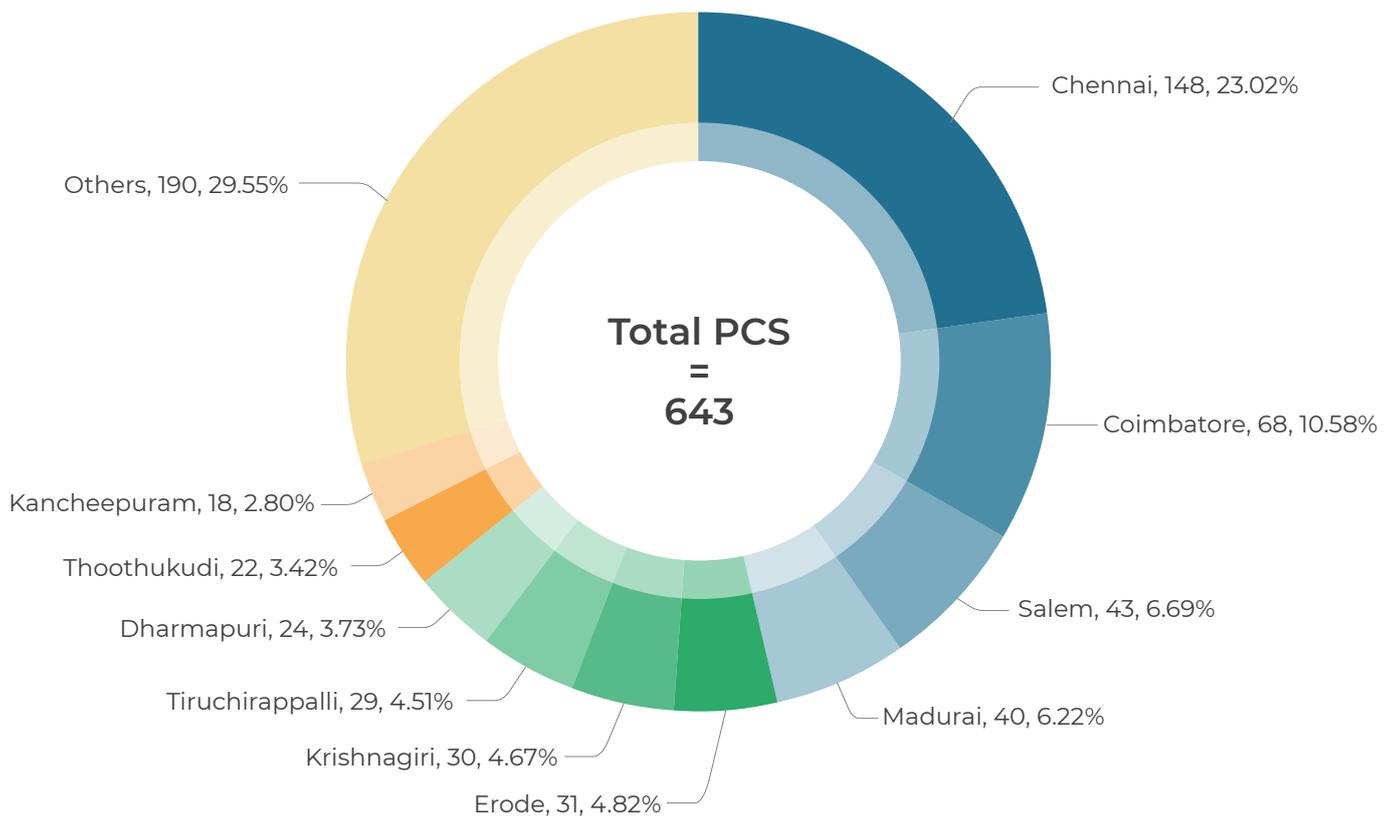


Source: Ministry of Heavy Industries, FAME-II Dashboard

## II. CHARGING INFRASTRUCTURE LANDSCAPE

As on May 2024, Tamil Nadu boasts **643 public charging stations** which is ~4% of nationwide total.

**Figure 5.2: District wise Public Charging Stations in Tamil Nadu**



Source: *JMK Research, Bureau of Energy Efficiency*

To provide an impetus towards EV adoption, the Government of Tamil Nadu declared six cities viz. Chennai, Coimbatore, Tiruchirappalli, Madurai, Salem, and Tirunelveli, as EV cities. These top EV cities hosts ~49% of total public charging stations in the state.

### III. INVESTMENTS IN TAMIL NADU

In July 2023, Auto major **Mahindra & Mahindra (M&M)** opened an electric vehicle battery testing facility at Mahindra Research Valley (MRV) in Chengalpattu, Tamil Nadu.

In August 2022, **Ather** has setup its manufacturing unit for production of E2Ws at Hosur, Tamil Nadu with a production capacity of 2.8 Lakh units annually.

Tamil Nadu hosts the manufacturing hub for E3W manufacturers namely **E-Royce Motors, TI Clean Mobility, and Reep Motors.**

Located at Ranipet, Tamil Nadu, **Ampere's** E2W manufacturing facility, built at an investment of INR 700 crore, aims to produce 1.20 lakh units every year

**TVS Motor** has a dedicated EV factory at Hosur, Tamil Nadu.

In February 2024, **VinFast** commenced construction work for establishing a new integrated EV manufacturing unit at Thoothukudi in southern Tamil Nadu where the company has planned to invest INR 4000 crore, spread over 5 years.

**Ola** began constructing its Future Factory in Krishnagiri district in February 2021, investing INR 2,400 crores. In February 2023, the company signed a MOU with the Tamil Nadu government to expand the factory with an additional investment of INR 7,614 crores.

In May 2023, **HMIL** has signed an MoU with the state's government to expand capacity and establish an EV ecosystem in Tamil Nadu at an investment of INR 200 billion over 10 years. HMIL will also set up a battery pack assembly unit with an annual capacity of 1.78 lakh units and will install 100 EV charging stations in Tamil Nadu in the next five

Source: News Articles, Company Website, JMK Research

As the electric vehicle landscape progresses in India, Tamil Nadu is poised to emerge as a key player in its growth, particularly in research and development. Leveraging deep industry insights, the government has been actively promoting the EV ecosystem, focusing on areas such as battery manufacturing, charging infrastructure, and overall vehicle production. Notable players such as Ola Electric, TVS Motors, and Ather Energy have established their manufacturing centres in the state, while others like VinFast have initiated the construction of EV factories there. With improving infrastructure, the adoption of EVs is poised to surge in state with each passing fiscal year.

# 6. RAJASTHAN

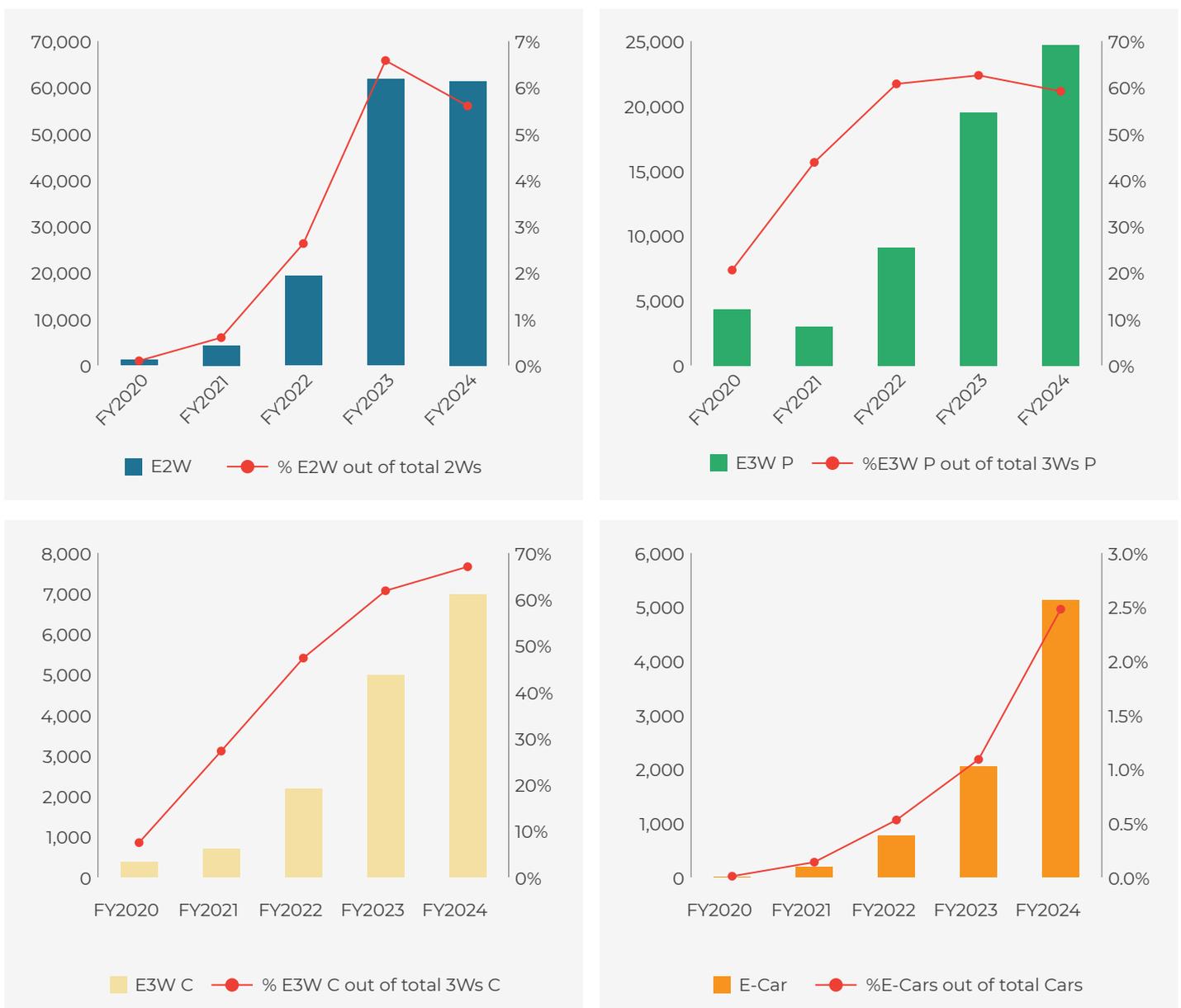
During FY2024, Rajasthan positioned itself as the fifth-largest contributor to EV sales in India, with **98,351** units sold, accounting for a **5.61%** share of EV sales in the country.

## 6.1 SALES & EV PENETRATION

The state exhibited a remarkable yoy growth approximately **11.34%** in EV sales for FY2024, which can be attributed to rise in E3W and E-car sales compared to FY2023.

In Rajasthan in FY2024, it's evident that **E2Ws** dominated with the largest market share, accounting for **62.34%** of total sales. This is followed by **E3W passenger** vehicles at **25.12%**, **E3W cargo** vehicles at **7.10%**, **E-Cars** at **5.21%**, and finally, **E-Buses** at a mere **0.01%**.

Figure 6.1: Segment wise EV sales trends in Rajasthan



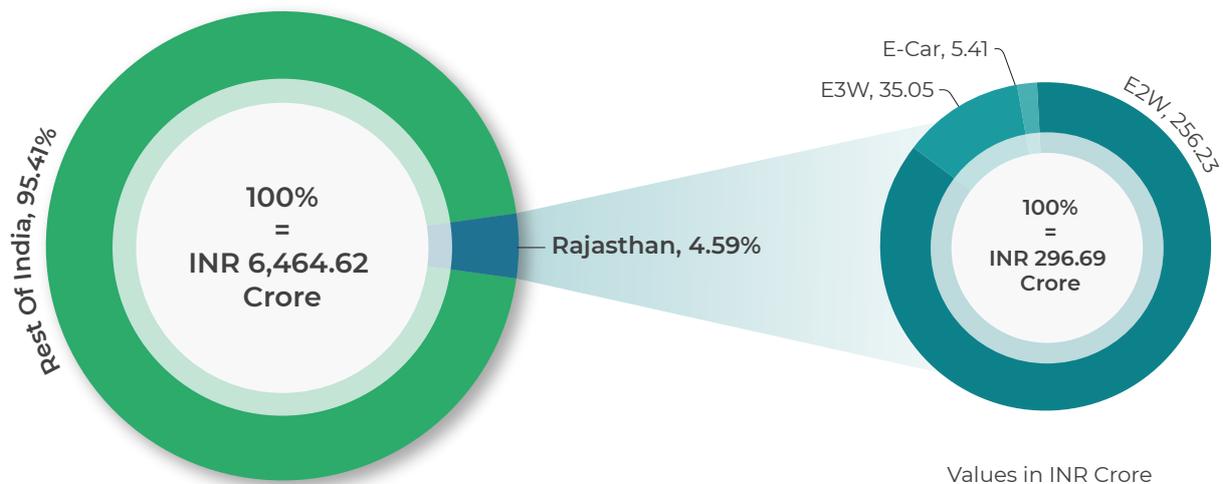
Source: [Vahan Dashboard](#), JMK Research

Rajasthan has demonstrated remarkable progress in the adoption of electric vehicles, particularly in the E3W Cargo category, where nearly 67% of cargo three-wheelers are now electrified. Additionally, the state has witnessed a y-o-y growth of approximately 150% in the E-Cars segment. Although there has been an uptick in sales within the E3W Passenger category during FY2024, the percentage of E3W penetration has declined due to a proportional rise in sales of ICE three-wheelers throughout during this period.

## 6.2 KEY DRIVERS

### I. SUBSIDIES DISBURSED UNDER FAME-II

As of May 2024, Rajasthan has availed subsidies totalling INR 296.69 crore under the FAME-II scheme, representing 4.58% of the nationwide subsidies. Notably, 86% of the total subsidy disbursed in Rajasthan was allocated to the E2W segment.

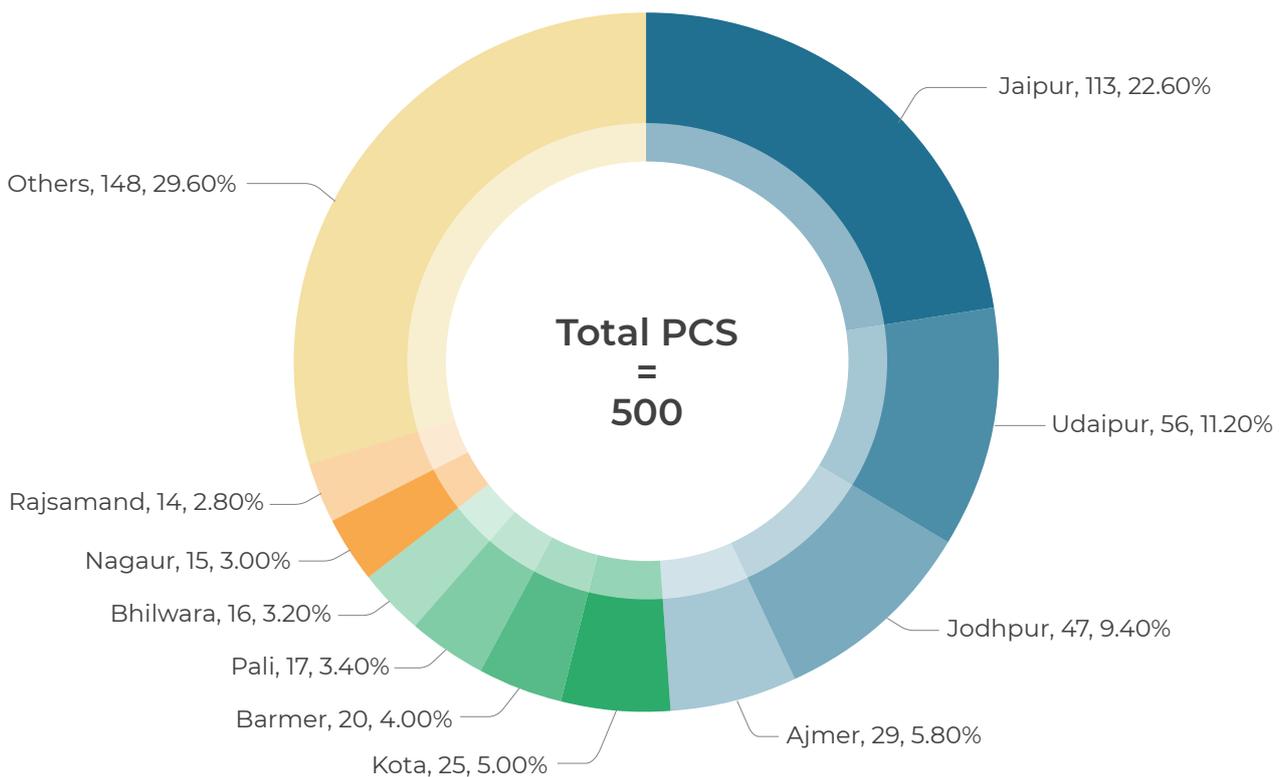


Source: Ministry of Heavy Industries, FAME-II Dashboard

## II. CHARGING INFRASTRUCTURE LANDSCAPE

The state's EV policy aims to fortify the public charging station network by providing capital subsidies for charging infrastructure and concessional power tariffs, with expectations of a substantial increase in the overall number of charging stations.

**Figure 6.2: District wise Public Charging Stations in Rajasthan**



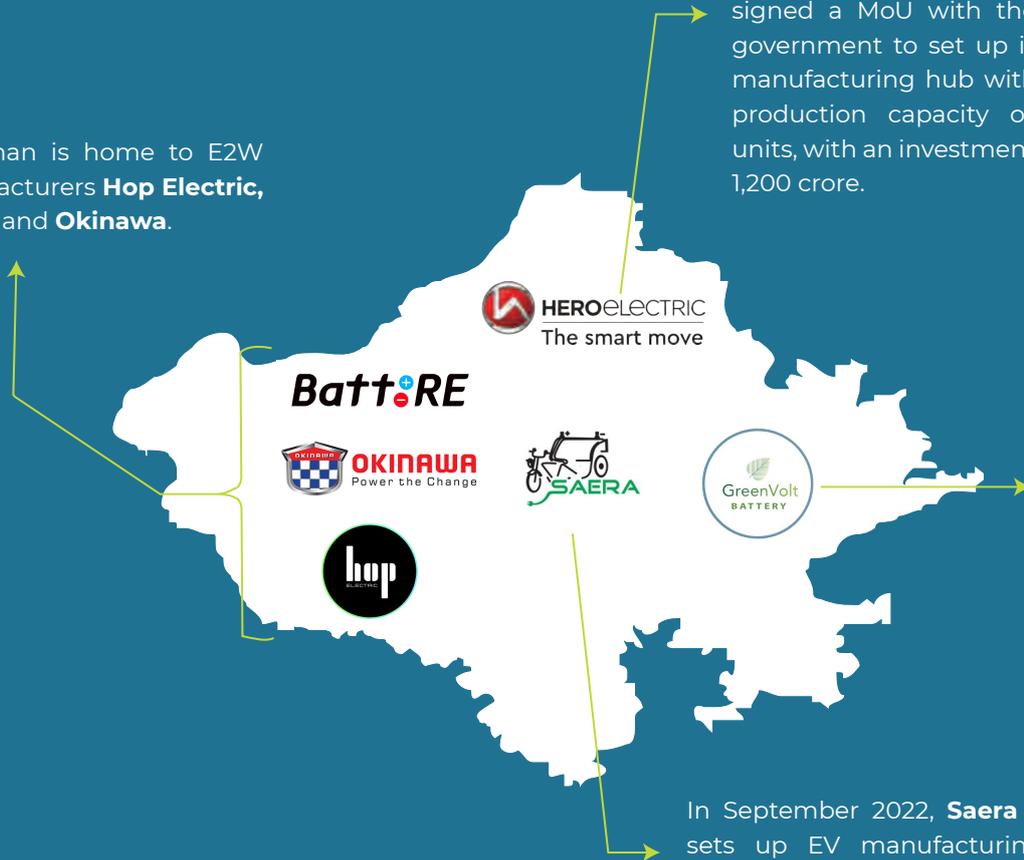
Source: JMK Research, Bureau of Energy Efficiency

As on May 2024, Rajasthan has 500 public charging stations which is ~3% of nationwide total, primarily clustered in urban centers like Jaipur, Udaipur, Kota, and Jodhpur.

### III. INVESTMENTS IN RAJASTHAN

Rajasthan is home to E2W manufacturers **Hop Electric**, **Battre** and **Okinawa**.

In September 2022, **Hero Electric** signed a MoU with the Rajasthan government to set up its mega EV manufacturing hub with an annual production capacity of 2 million units, with an investment of over INR 1,200 crore.



**Greenvolt Battery** has a manufacturing base in Jaipur, Rajasthan, where it produces lithium-ion batteries for E2Ws and E3Ws.

In September 2022, **Saera Electric** sets up EV manufacturing plant worth INR 25 crore in Bhiwadi, Rajasthan.

Source: News Articles, Company Website, JMK Research

# EV ONLINE DASHBOARD



	DELIVERABLES	PARTNERS				DETAILS
		Platinum	Gold	Silver	Associate	
DATABASE PORTAL	EV Portal Annual Subscription	✓	✓	✓	✓	Access to unlimited subscribers for our EV online Dashboard
	EV Daily/ Weekly/ Monthly Newsletters	✓	✓	✓	✓	-
	Monthly Excel Tracker	✓	✓	✓	✓	Every month 3 Excel Trackers will be shared 1. Sales ( OEM wise, State wise, city wise ) 2. Product Models launched 3. Investments & Deals tracker
REPORTS	Access to Paid Reports	All Reports	Any 4 Reports	Any 2 Report	-	7 paid reports will be published in a year <ul style="list-style-type: none"> <li>E2W Market Annual Update</li> <li>E3W Market Annual Update</li> <li>E-Bus Market in India</li> <li>E-Cars Market in India</li> <li>Charging Infra Market Trends</li> <li>LIB Manufacturing Landscape</li> <li>LIB Recycling Market</li> </ul>
EVENTS	Delegate passes for Physical Conferences	5 Passes	3 Passes	2 Passes	1 Pass	-

# INDIA EV MARKET CONCLAVE 2024

*Meet the Leaders*

30<sup>th</sup> AUG 2024

Leela Ambience, Gurgaon

*Let's connect to know the views of the industry leaders who are spearheading the EV revolution in India. Leadership from the following segments would grace the event.*

- ...OEMs (E2W, E3W, E-Cars, E-Buses, E-Trucks)*
- ...Component Manufactureres*
- ...Charging Infrastructure providers*
- ...Battery and Cell Manufacturers*
- ...Leasing, Financing and Insurance Experts*

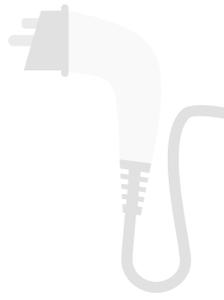
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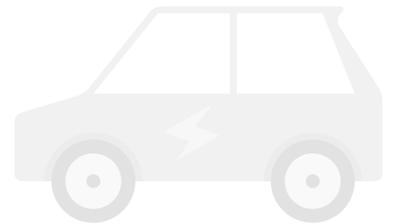
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