

EV

Sales Digest

August 2025



Segment-wise Performance

In August 2025, sales of high-speed electric two-wheelers (HS E2Ws) in India increased by ~1% m-o-m, totaling 1,04,306 units. The top 3 players dominated the market, accounting for approximately 58% of total E2W registrations during the month.



In August 2025, registered sales of passenger electric three-wheelers (E3Ws) stood at 54,969 units, reflecting an ~9% m-o-m decrease but a marginal ~0.7% year-on-year increase over August 2024. The top 8 players in the E3W passenger market collectively held about 44% market share. Mahindra secured the top position this month with a market share of ~14%, followed closely by Bajaj Auto at ~11%.



In August 2025, registered sales of cargo-type electric three-wheelers (E3Ws) stood at 8,509 units, reflecting a ~4% month-on-month decrease and ~38% y-o-y increase compared to August 2024. The top 8 players in the electric three-wheeler cargo segment collectively held ~38% of the market. Mahindra led the segment with a market share of ~11%, followed by Bajaj Auto at ~6%.



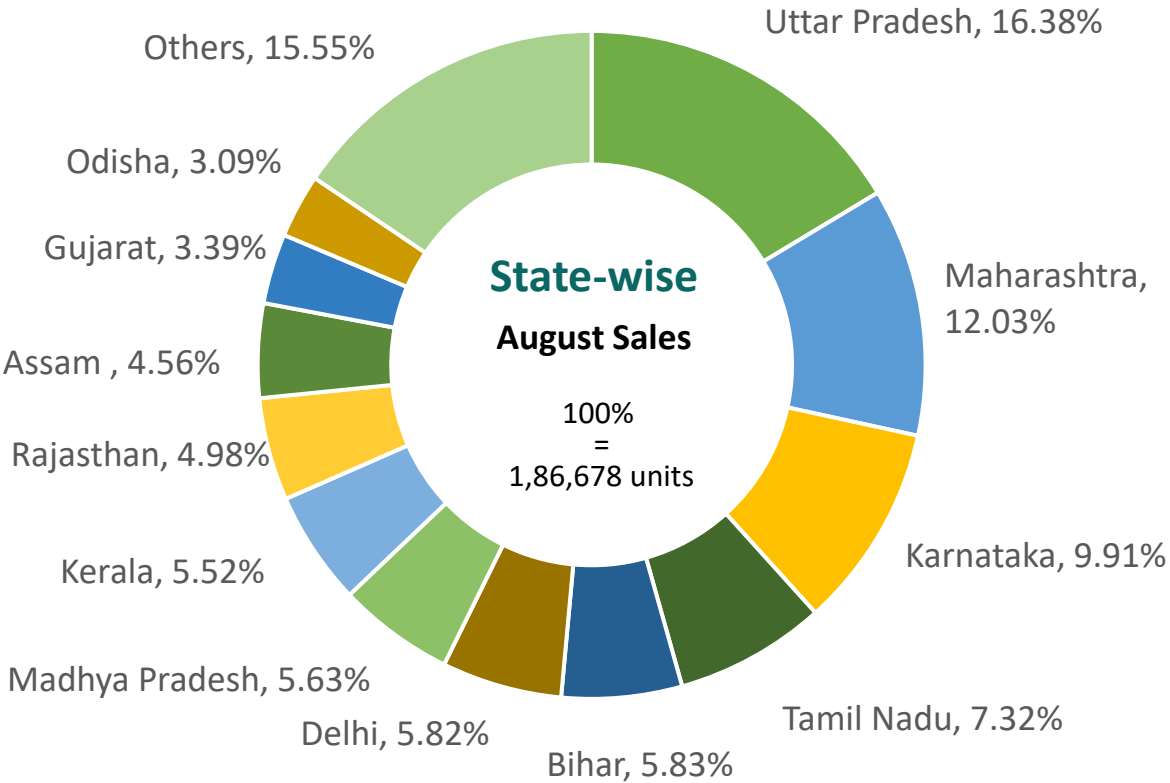
In August 2025, total E-Car sales stood at 17,308 units, reflecting a 13% m-o-m increase. On a y-o-y basis, sales grew by ~173% compared to August 2024. Tata Motors maintained its dominance in the E-Car market, securing a ~41% market share.



In August 2025, total E-bus sales amounted to 394 units, reflecting ~8% m-o-m and ~62% y-o-y increase, compared to August 2024. Olectra Greentech led the market with a dominant ~25% share, closely followed by JBM Auto at ~24.6%.



Registered EV Sales Trends in India

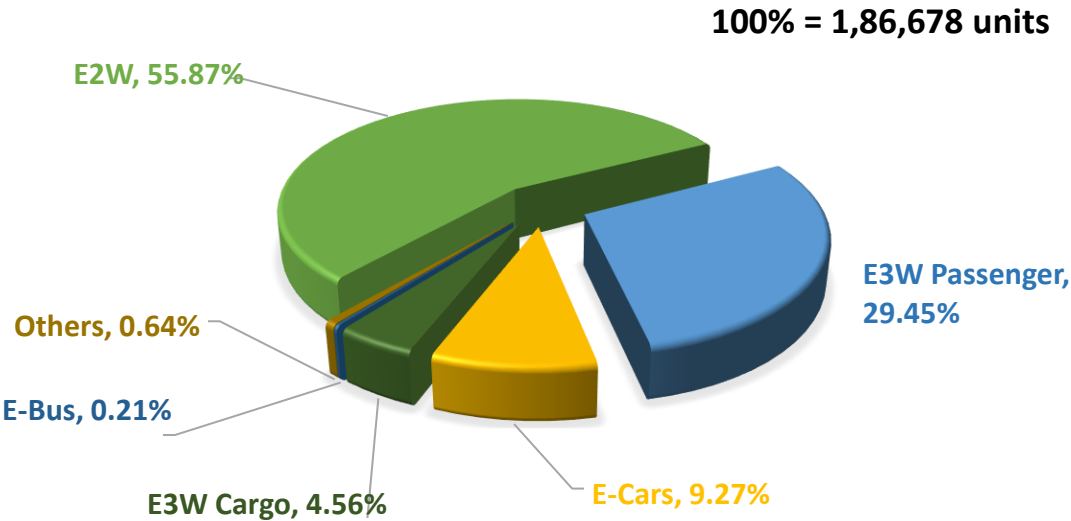


Note: Others include Chhattisgarh, Uttarakhand, Punjab, and 20 other states/UTs.

Source: Vahan Dashboard, JMK Research; Note: Sales figures represent EVs registered across 1,391 RTOs in 35 states/ UTs.

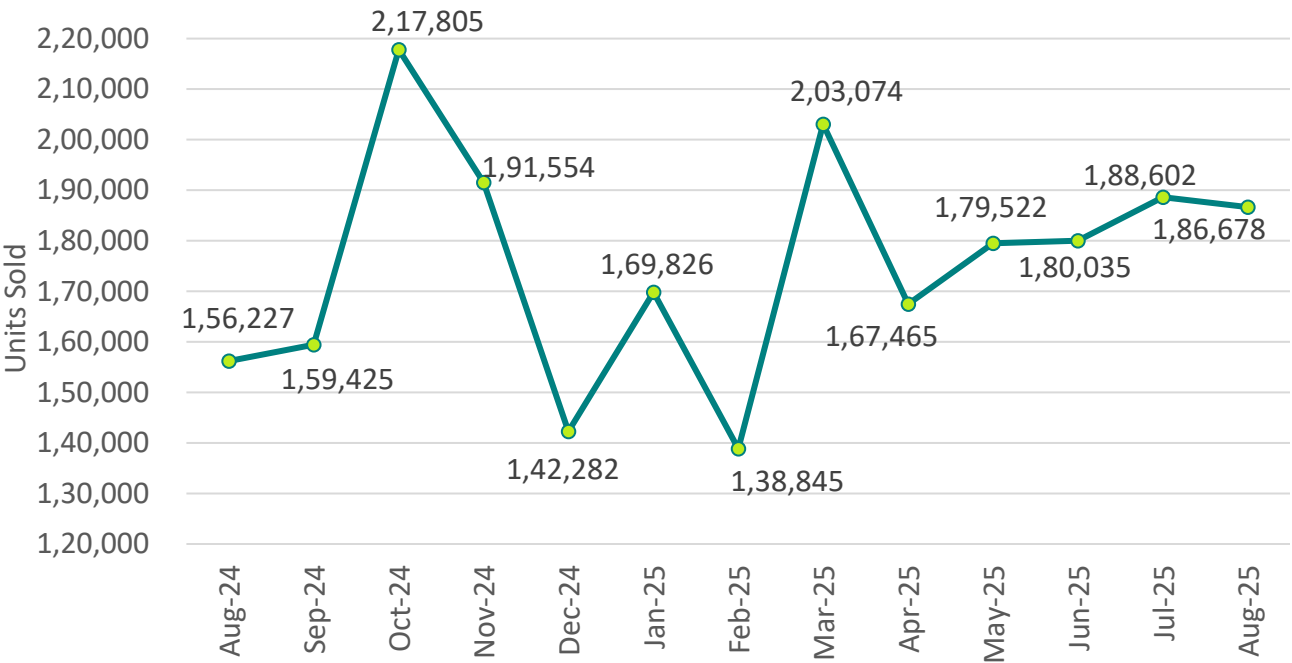


Category-wise



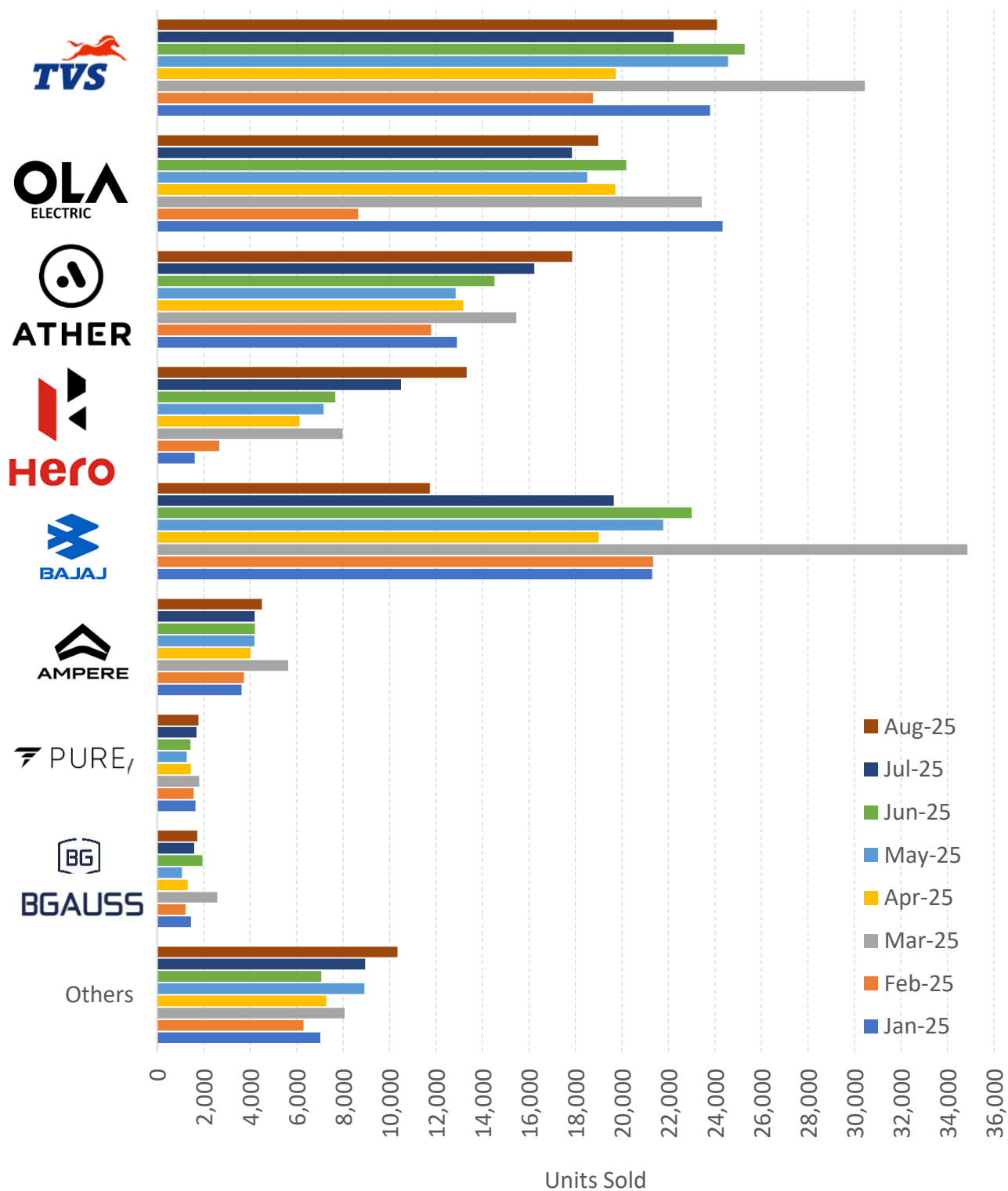
Note: Others include adapted vehicle, agricultural tractor, articulated vehicle, auxiliary trailer, cash van, construction equipment vehicle, construction equipment vehicle (commercial), fork lift, mobile clinic, goods carrier, private service vehicle, private service vehicle (individual use), and tractor (commercial)

Monthly Sales Trends



Source: Vahan Dashboard, JMK Research; Note: Sales figures represent EVs registered across 1,391 RTOs in 35 states/UTs.

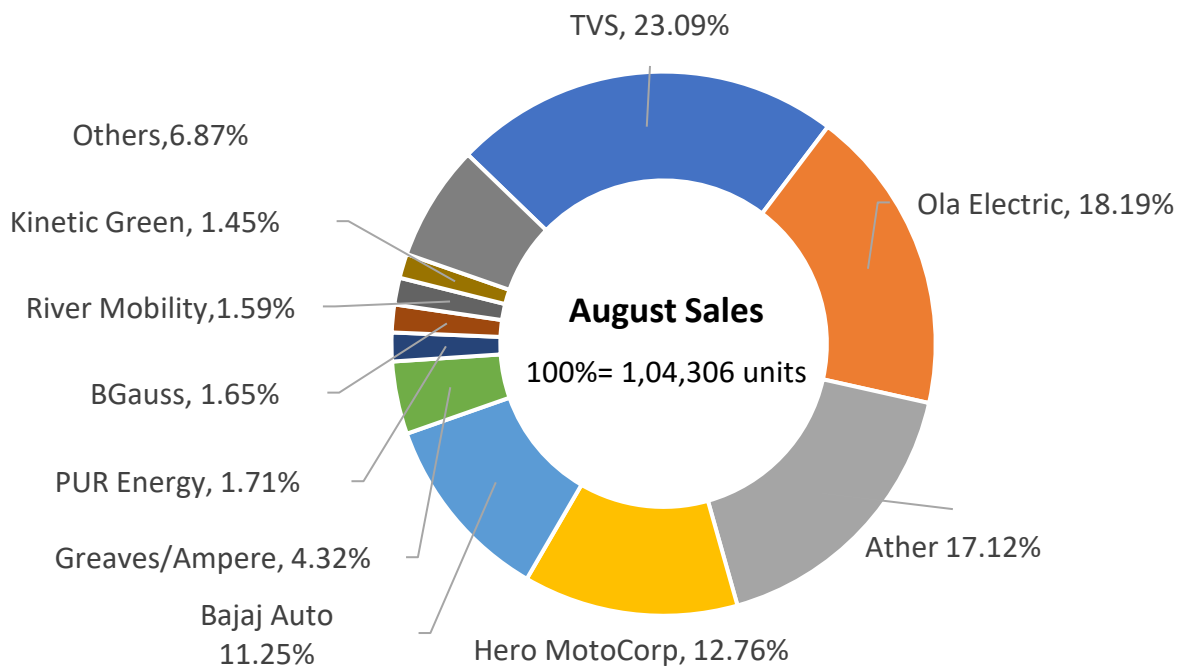
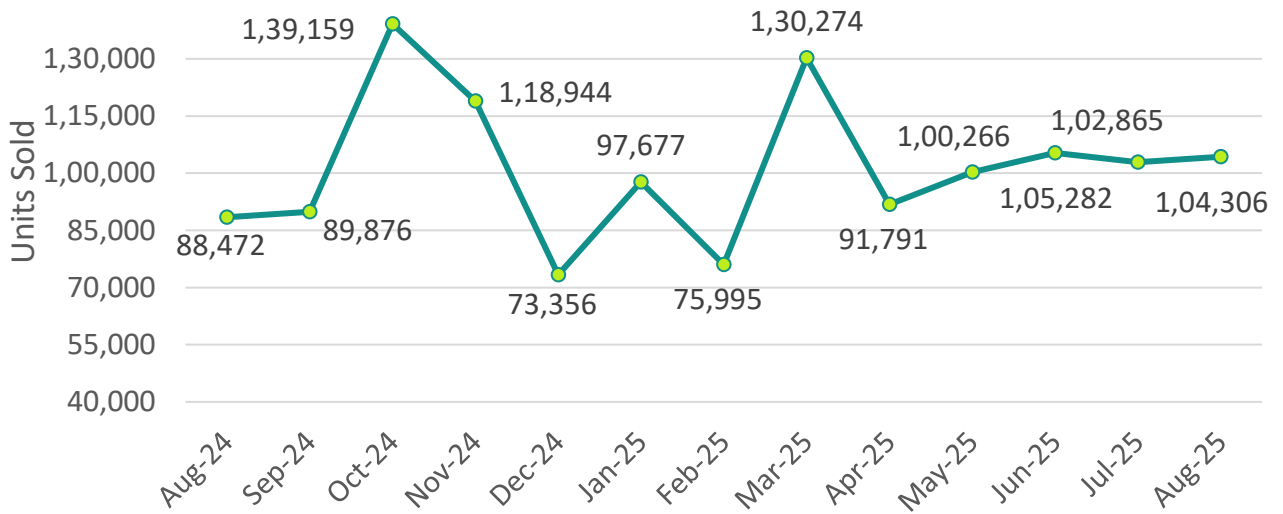
High-Speed Electric Two-Wheeler



Source: Vahan Dashboard, JMK Research, Note: Sales figures represent only high-range E2W (Top speed > 25 kmph) registered across 1,391 RTOs in 35 states/ UTs.

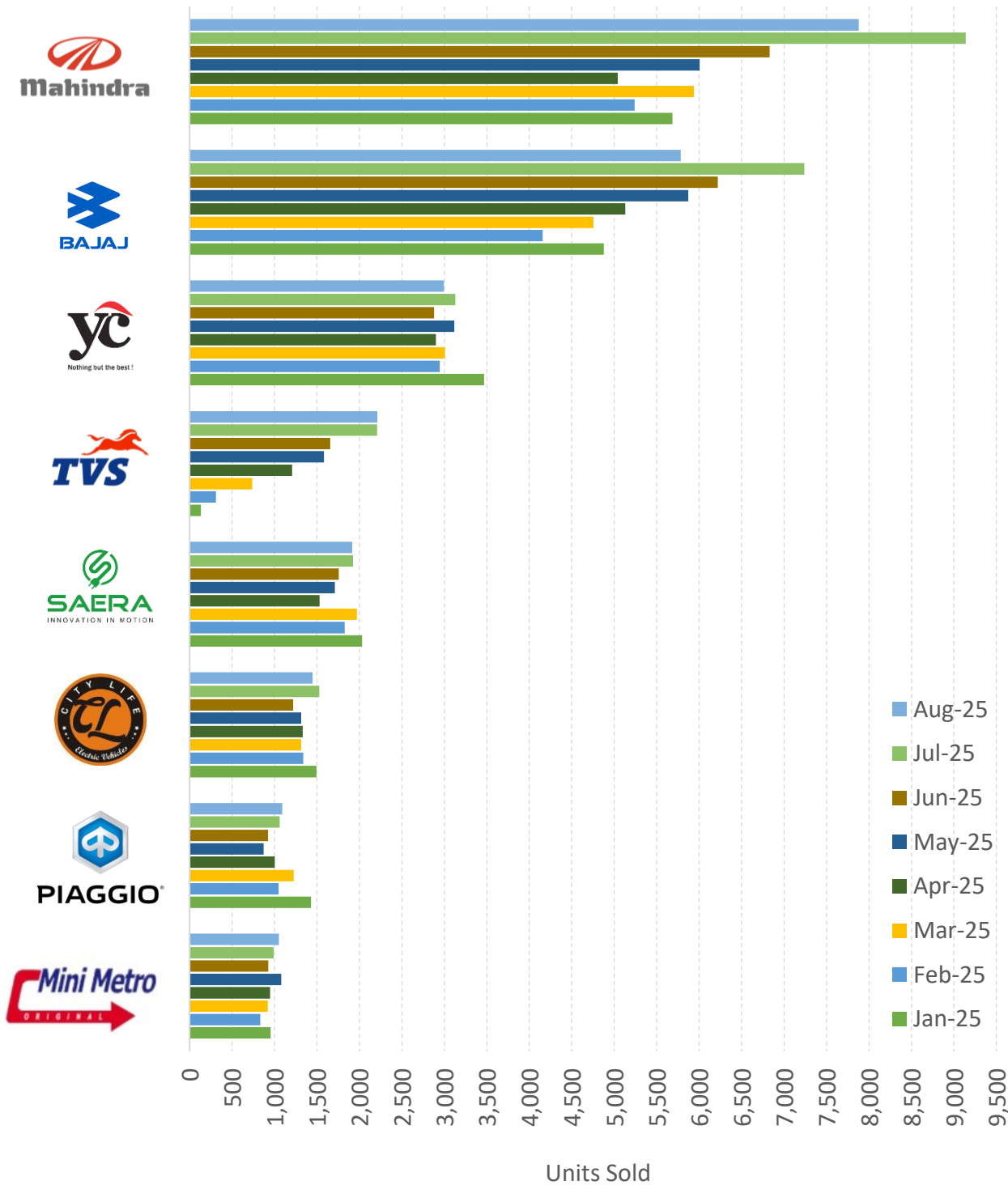
Note: The sales for Ampere include sales of Ampere and Greaves.

Total HS E2W Sales



Sales of high-speed E2Ws in India recorded marginal growth in August 2025, reaching 1,04,306 units. **TVS led the market with a share of around 23%.** Bajaj Auto slipped to the fifth position, with a market share of 11.25%, while Ola Electric increased its sales, capturing 18% market share.

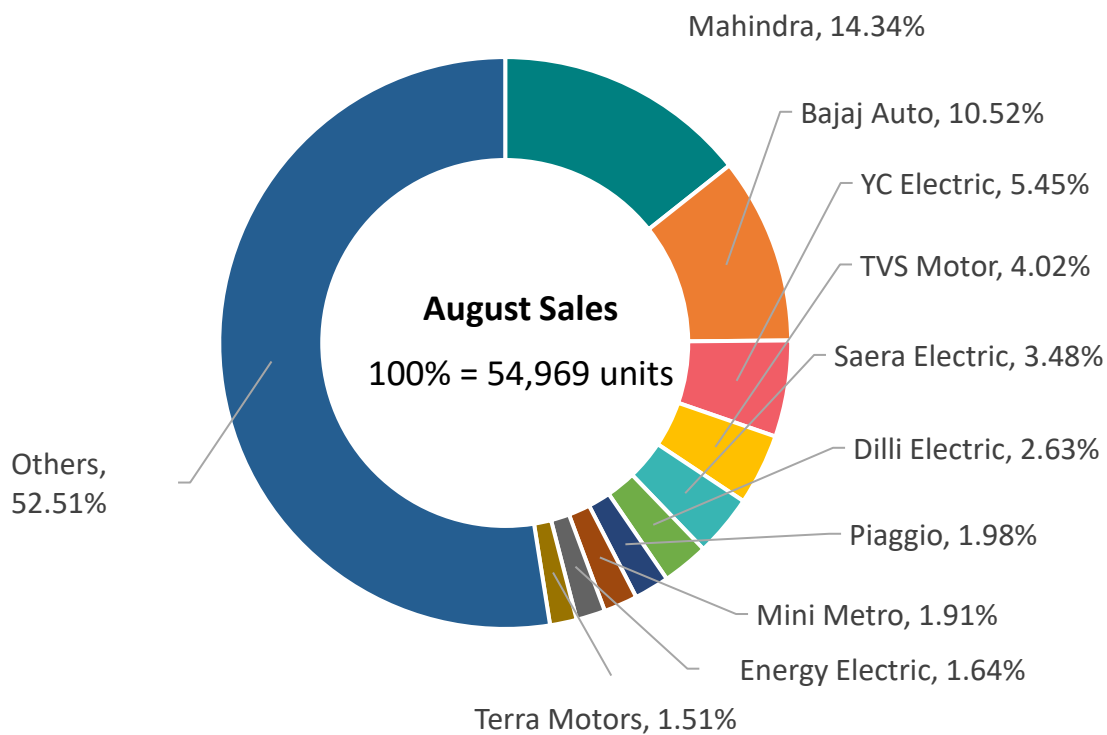
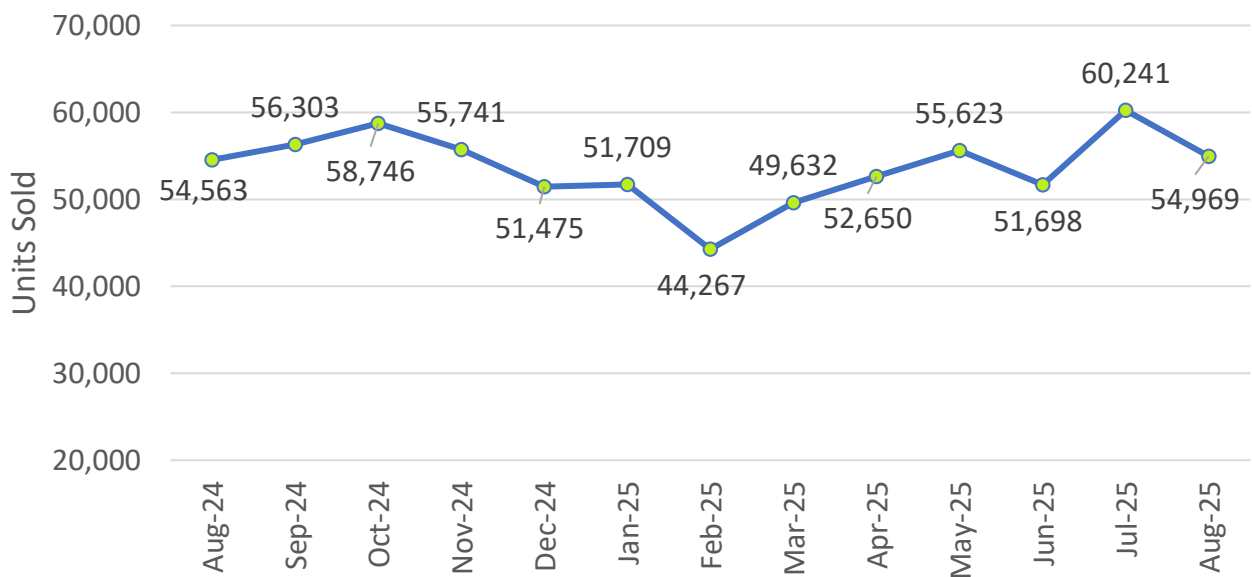
Electric Three-Wheeler Passenger



Source: Vahan Dashboard, JMK Research

Note: Sales figures represent E3W (P) registered across 1,391 RTOs in 36 states/ UTs.

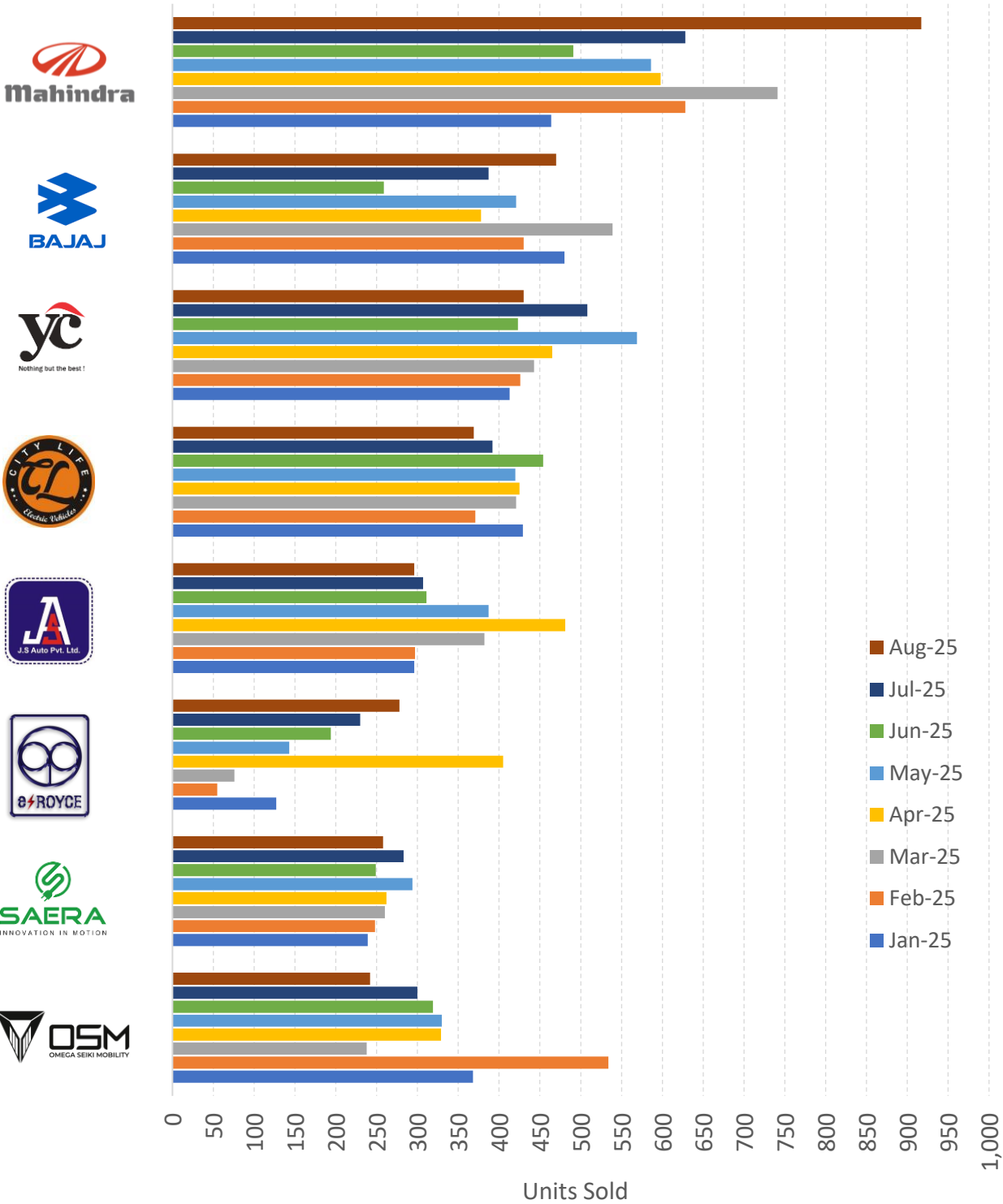
Total E3W Passenger Sales



In August 2025, registered sales of passenger-type E3Ws stood at 54,969 units, reflecting a ~9% m-o-m decline but a marginal 0.7% y-o-y increase.

Source: Vahan Dashboard, JMK Research
Note: Sales figures represent E3W (P) registered across 1,391 RTOs in 36 states/ UTs.

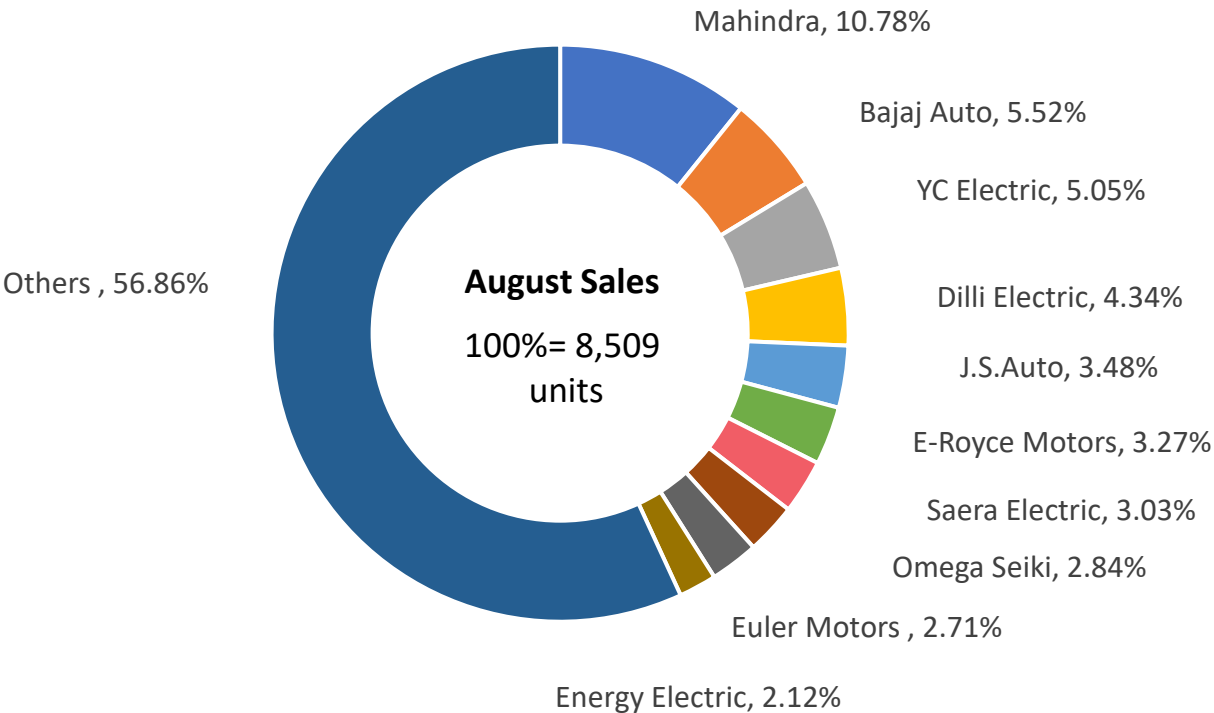
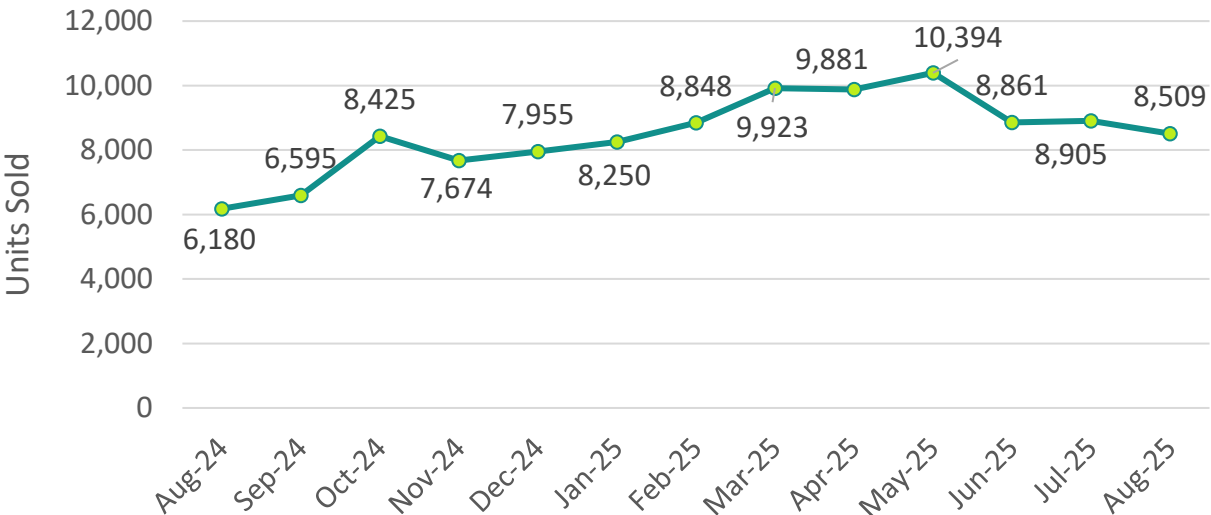
Electric Three-Wheeler Cargo



Source: Vahan Dashboard, JMK Research

Note: Sales figures represent E3Ws (C) registered across 1,386 RTOs in 35 states/ UTs

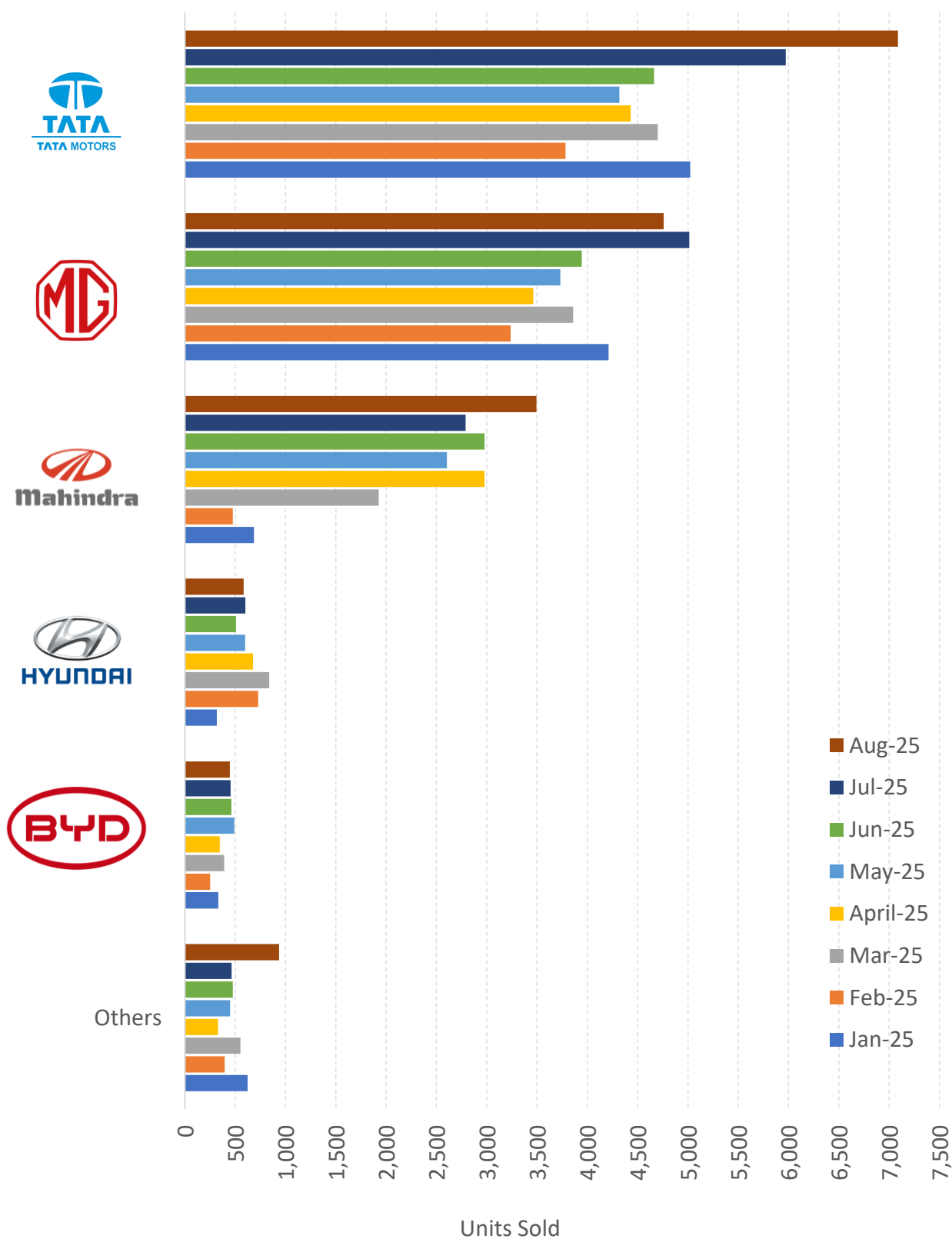
Total E3W Cargo Sales



In August 2025, registered sales of cargo-type E3Ws stood at 8,509 units, reflecting a ~4% month-on-month decrease but a strong ~38% y-o-y increase.

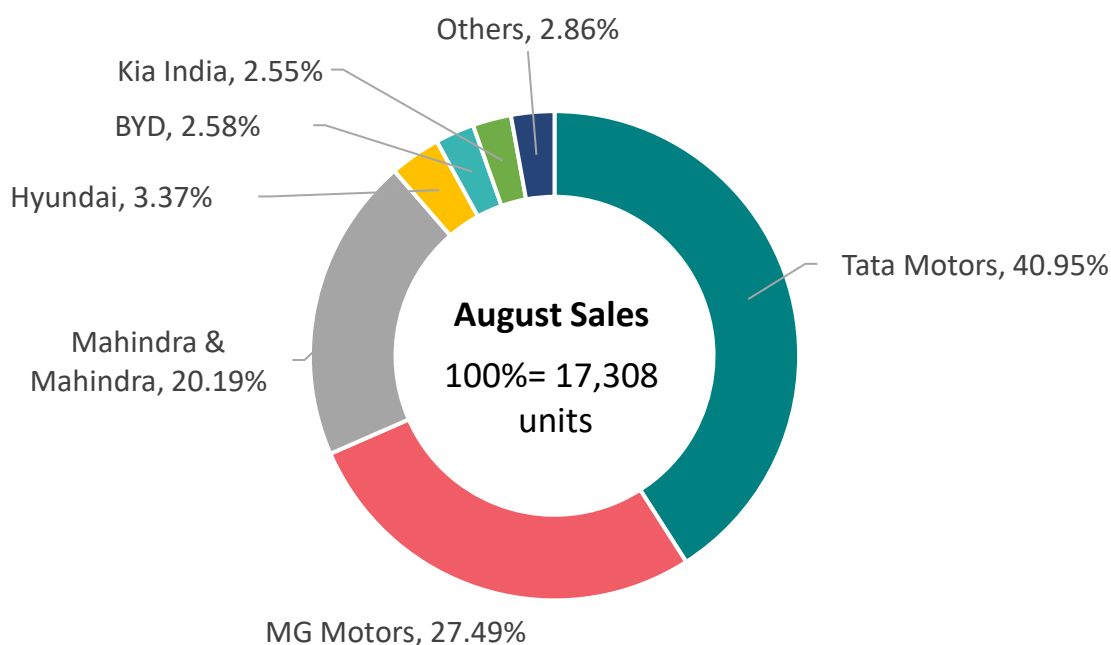
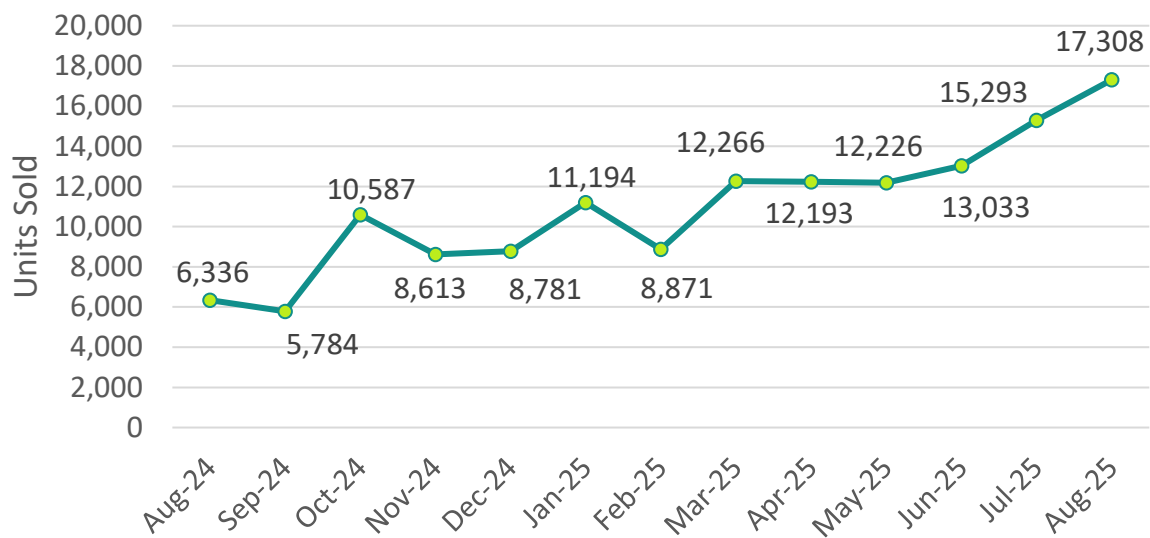
Source: Vahan Dashboard, JMK Research
Note: Sales figures represent E3Ws (C) registered across 1,391 RTOs in 35 states/ UTs

Electric Cars



Source: Vahan Dashboard, JMK Research
Note: Sales figures represent E-cars registered across 1,391 RTOs in 35 states/ UTs; Others include Audi ,BMW, Hyundai, Jaguar , KIA Motors , Mercedes-Benz, Porsche and Volvo Auto

Total E-Cars Sales

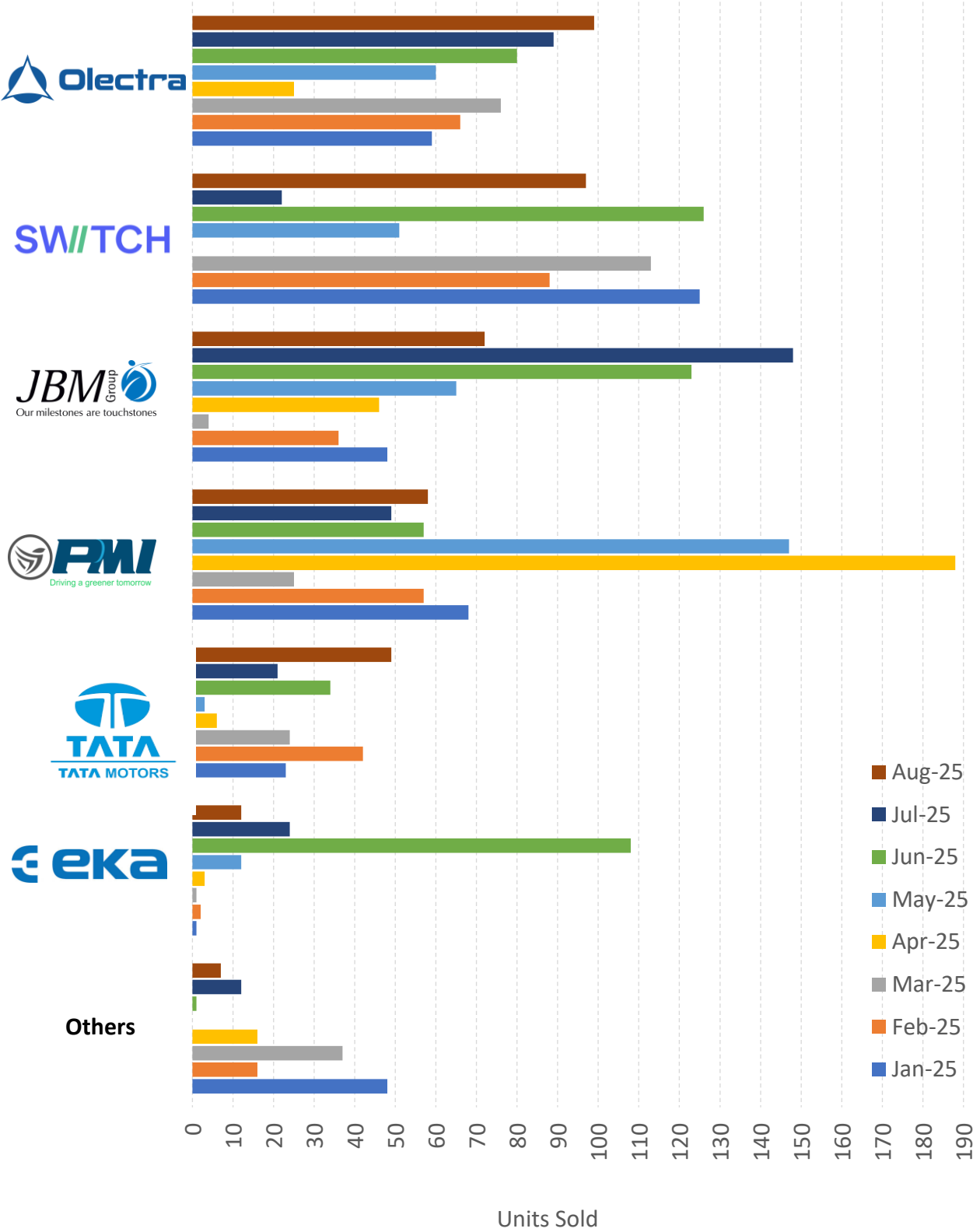


In August 2025, total E-Car sales stood at **17,308** units, registering a 13% m-o-m increase. **Tata Motors** maintained its dominance with a market share of **~41%**, **while** MG Motor strengthened its position as a strong competitor, capturing about 27% of the market.

Source: Vahan Dashboard, JMK Research

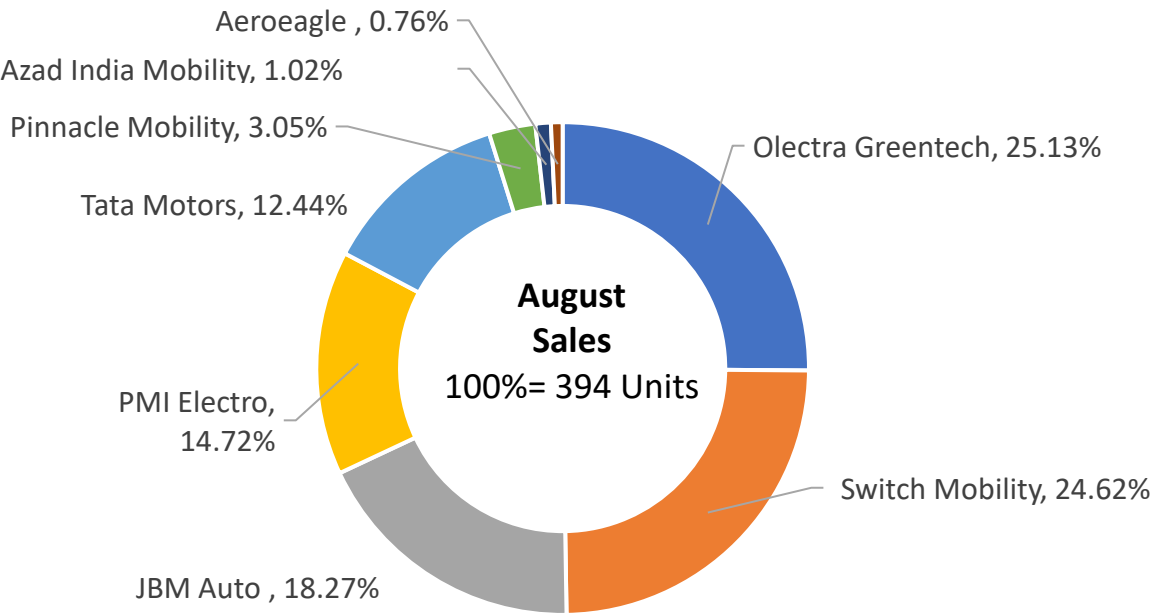
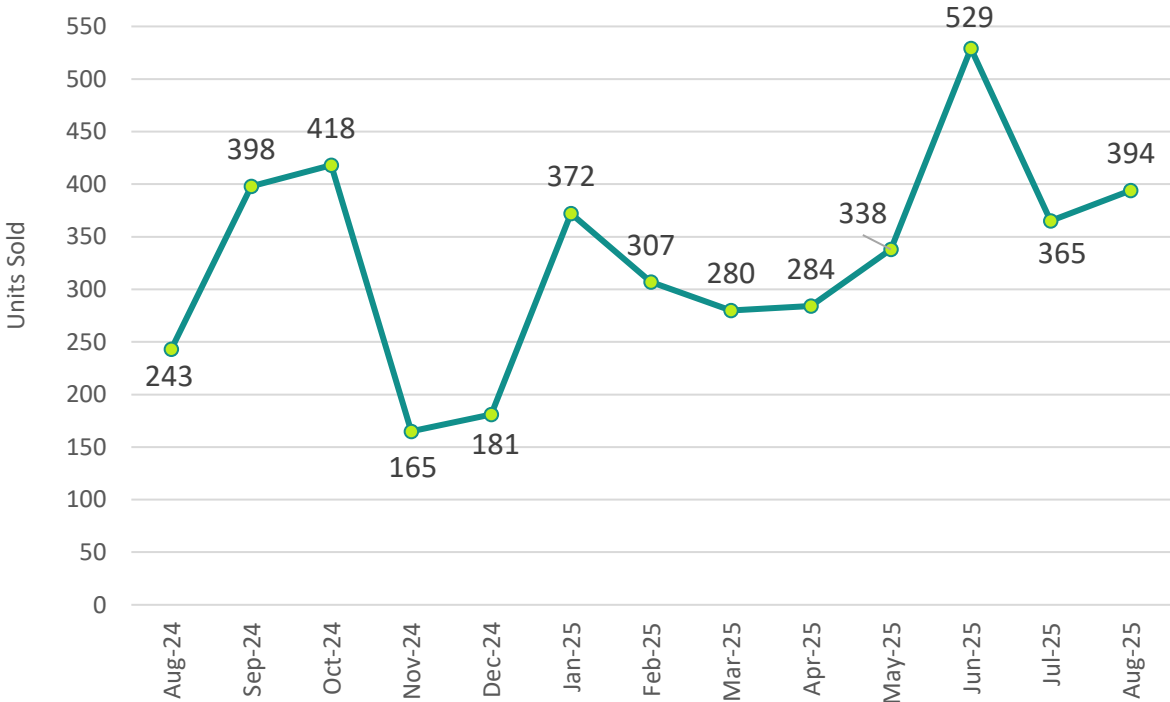
Note: Sales figures represent E-cars registered across 1,391 RTOs in 35 states/ UTs; Others include Audi ,BMW, Jaguar, Mercedes-Benz, PCA, Porsche and Volvo Auto

E- Buses



Source: Vahan Dashboard, JMK Research
Note: Sales figures represent E-Buses registered across 1,391 RTOs in 35 states/ UTs

Total E-Buses Sales



In August 2025, E-Bus sales reached 394 units, reflecting 8% month-on-month increase and a strong ~62% year-on-year rise compared to August 2024. Olectra secured the top spot with ~25% share, while Switch Mobility followed closely at 24.62%.

Source: Vahan Dashboard, JMK Research
Note: Sales figures represent E-Buses registered across 1,391 RTOs in 35 states/ UTs



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- Ex Showroom price

-
- Central and State policy and regulatory updates
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 - Deals & Investments

- JVs & Partnerships
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- Other Market Updates
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The report is available in ppt format with access to data under the graphs.



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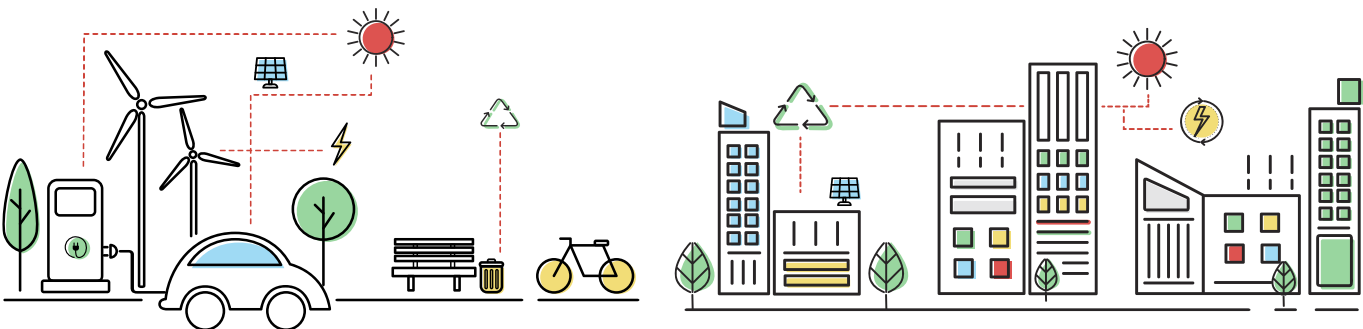
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✓	✓	✓	✓
✓	✓	✓	✓
✓	✓	✓	✓
All Reports	Any 4 Reports	Any 2 Reports	–
5	3	2	1



Thank you!

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