

A close-up, low-angle shot of a car's rear taillight. The taillight is illuminated with a bright red glow, and the surrounding car body is dark, creating a high-contrast, moody atmosphere. The taillight has a modern, angular design with horizontal lines at the bottom.

INDIAN AUTOMOTIVE INDUSTRY

Market Report
/ November'21

ENERDYNE

Faced with shortage of semiconductors, Indian automotive sector recorded one of the worst festive periods in past decade during the month of November, 2021.

PASSENGER CARS

With sale of 245,262 passenger cars during the month, the industry saw a fall of 14% on YOY basis and 5.7% on MOM basis.

However, the fall in sales was mainly owing to shortages on the supply side, while the demand side remained reasonably high, leading to an overall optimistic outlook for the coming months. The two largest OEMs – Maruti Suzuki and Hyundai - bore the full brunt of the component shortages and supply chain disruptions with Maruti losing the largest market share (2.7%) followed by Hyundai who lost 2% of the market share as compared

to same period last year.

The Indian OEMs – Tata and Mahindra – performed much better, with TATA gaining 4.6% market share and Mahindra 1.6%. Sales performance of Tata improved across all models, with special help from the newly launched PUNCH. Mahindra gained by 8% on YOY basis, with 16% of added sales coming from the newly launched XUV 700. Kia was also one of the big losers, dropping to 5 th position on the pole, while Toyota performed well, gaining 2.3% market share with sales of 13,003 units in November'21 as compared to month of November'20.

Car Sales report in India for the month of November'21

RANK	OEM	YoY Analysis			MoM Analysis			Market Share		
		Nov'21	Nov'20	Growth	Nov'21	Oct'21	Growth	Nov'21	Nov'20	MS Change
1	Maruti Suzuki	1,09,722	1,35,775	-19%	1,09,722	1,08,991	0.7%	44.7%	47.4%	-2.7%
2	Hyundai	37,001	48,800	-24%	37,001	37,021	0%	15.1%	17%	-2.0%
3	Tata	29,780	21,640	38%	29,780	33,926	-12%	12.1%	7.6%	4.6%
4	Mahindra	19,400	17,971	8%	19,400	20,034	-3%	7.9%	6.3%	1.6%
5	Kia	14,214	21,022	-32%	14,214	16,331	-13%	5.8%	7.3%	-1.5%
6	Toyota	13,002	8,508	53%	13,002	12,440	5%	5.3%	3.0%	2.3%
7	Honda	5,457	9,990	-45%	5,457	8,108	-33%	2.2%	3.5%	-1.3%
8	Renault	5,052	10,181	-50%	5,052	8,910	-43%	2.1%	3.6%	-1.5%
9	VW	3,154	1,412	123%	3,154	3,077	3%	1.3%	0.5%	0.8%
10	Nissan	2,651	1,017	161%	2,651	3,913	-32%	1.1%	0.4%	0.7%
11	MG	2,481	4,163	-40%	2,481	2,863	-13%	1.0%	1.5%	-0.4%
12	Skoda	2,196	1,056	108%	2,196	3,065	-28%	0.9%	0.4%	0.5%
13	FCA	1,052	709	48%	1,052	1,324	-21%	0.4%	0.2%	0.2%
14	Citroen	100	0	0	100	64	56%	0.0%	0.0%	0.0%
15	Ford	0	3,991	-100%	0	0		0.0%	1.4%	-1.4%
	TOTAL	2,45,262	2,86,235	-14%	2,45,262	2,60,067	-5.7%			

TWO-WHEELERS

The two-wheeler industry too reflected a poor performance for the month, but unlike passenger cars, the demand sentiment seemed to be much lower in this segment, leading to a flat outlook and slow recovery for the two-wheeler industry over next few months.

Two Wheeler Sales Report: November'21				
RANK	OEM	YoY Analysis		
		Nov'21	Nov'20	Growth
1	Hero	3,49,943	5,91,091	-40.80%
2	BAJAJ	3,38,473	3,84,993	-12.08%
3	Honda	2,80,381	4,33,206	-35.28%
4	TVS	2,57,863	3,11,519	-17.22%
5	Enfield	51,564	63,782	-28.37%

MARKET NEWS

- Mahindra plans launch of 13 new SUV models, 8 of them EVs, by 2027**

Market share of SUVs in the Indian passenger car industry has been steadily going up over the years. While the SUV segment share was only 13.5% of the total passenger car market in 2015, it has increased to 29% in 2020.

Mahindra has announced its plans to launch 13 SUVs by 2027, including 8 fully electric. It is expected that electric SUVs will attain 20% penetration by then. Country's leading car maker Maruti Suzuki is also gearing up to expand its range of SUV models and has started work on new models.

- Omega Seiki Mobility launches cargo electric 3 – wheeler**

A new fast charging electric 3-wheeler for cargo purpose has been launched by EV maker Omega Seiki Mobility in partnership with Log 9 Materials.

Pre bookings have already commenced as per company release.

- SKODA plans to make electric cars in India**

Skoda Auto, a part of VW group, has announced plans to make electric cars in India and will launch the EV program even earlier, by introducing the green SUV Enyaq through imported route. This could result in nearly 30% of Skoda / VW India portfolio running on electric power train by end of the decade.

- Honda Motor starts battery sharing subsidiary in India**

Honda Motor Co. announced a subsidiary – Honda Power Pack Energy India Pvt Ltd – to make its new portable battery “Honda Mobile Power Pack e:” at Bangalore and plans to start battery sharing service for electric auto rickshaws from the first half of 2022. The new subsidiary will also work closely with OEMs to help them integrate Honda's battery into their vehicles.