



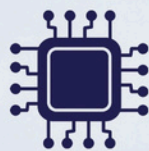
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MAGAZINE | AUGUST 2026

ISSUE NO. 67

INSIDE THIS ISSUE



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What's

INSIDE



- 06 Switch Mobility's Ganesh Mani on Scaling E-Buses and E-LCVs
- 20 India EV Sales and Top OEMs for Jul 2026
- 26 India EV Sales Performance | Q1 FY2026-27
- 29 Inside Amara Raja's Customer Qualification Plant for Lithium-ion Cells
- 34 Summary of Investment Commitments | Jul 2026
- 35 BYD eMAX 7 | Long-Term User Review
- 42 Electric Car, LCV & HCV Sales Trend | Jan 2026 - July 2026
- 45 Snapshot of India's Public EV Charging Infrastructure
- 48 The Role of Insulation Monitoring Devices in DC EV Charging
- 52 Essential Industry Updates

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Switch Mobility Turns Net Profitable in FY26



CEO Ganesh Mani on Scaling E-Buses and E-LCVs

Switch delivered 1,530 electric buses and 1,600 e-LCVs during FY25-26.

Ganesh Mani, CEO of Switch Mobility, discusses the levers behind achieving profitability, including a focus on scaling the right product portfolio across electric buses and light commercial vehicles, localisation levels of 60-70%, and vehicle uptime of around 98%.

Switch Mobility India achieved net profitability in FY25-26. What have been the biggest levers in getting here?

Achieving net profitability in FY26 is an important milestone and reflects the progress we have made in building a sustainable electric mobility business. One of the biggest levers has been our focus on scaling the right product portfolio across electric buses and light commercial vehicles, backed by disciplined execution across manufacturing, sourcing and operations.

We have steadily **improved localisation to 60-70%**, strengthened manufacturing efficiencies and optimised costs across the value chain. And, we continue to invest in technology and product development. At the same time, our focus on delivering around **98% vehicle uptime**, supported by our connected mobility platform, has enabled us to build strong customer confidence and generate repeat business. Going forward, we remain focused on profitable growth by expanding our product portfolio, increasing localisation and continuing to improve operational efficiencies.



Could you provide a snapshot of Switch Mobility's production capacity for buses and LCVs in Tamil Nadu, as well as the target for the upcoming facility in UP?

We have a total **production capacity of 5,000 buses and e-LCVs across our plants.**

Our green-certified manufacturing facility in Lucknow, Uttar Pradesh, has been operationalised and designed to further strengthen our production capabilities in North India. The facility features an automated paint line and a modular assembly framework that enhances manufacturing flexibility, improves supply chain responsiveness and enables us to efficiently cater to growing demand across electric buses and commercial vehicles. The plant is well equipped to handle any order size that will come.

Between the 9m, 12m, and the double-decker buses, how do you see the future demand split between these formats, and corresponding use cases?

We see each platform addressing a distinct mobility requirement. Demand will increasingly be driven by application-specific use cases rather than a one-size-fits-all approach.

- We expect the **12-metre** bus to continue accounting for the **largest share of demand**, particularly from State Transport Undertakings and high-capacity city operations.



- We see strong growth potential for the **9-metre segment**, driven by feeder routes, employee transportation, school mobility and operations in Tier II and Tier III cities, where route flexibility and lower operating costs are important.
- Electric **double-decker buses** will continue to serve high-density urban corridors and tourism applications. Compared to a conventional 12-metre bus, they consume around **37% less road space and 25% less energy per passenger**, making them an efficient solution for cities looking to maximise passenger movement without expanding road infrastructure.

While the double-decker segment will remain more specialised, we expect all three platforms to witness healthy growth as cities increasingly adopt purpose-built electric buses based on operational requirements.

Electric bus adoption is now moving beyond government-tender-driven demand. How do you see the order book composition changing in the next 2-3 years?

*We started the current financial year with an **order book of over 1,600 buses**, providing strong visibility for future growth. Since then, we have added more.*

Customer confidence is reflected in repeat orders and expanding deployments. For example, we have **delivered 625 electric buses to MTC and have already deployed over 500 electric buses in Delhi as part of a 950-bus order.** These are large-scale operations where performance is measured every day.

State Transport Undertakings (STUs), PM e-Drive and Government schemes will continue to remain key drivers of electric bus adoption. **Industry volumes are expected to nearly double from around 5,300 buses last year to nearly 13,000 buses and over 25,000 buses by FY30.**

At the same time, we are seeing increasing interest from private operators as the total cost of ownership becomes more favourable and electric mobility proves its operational reliability across diverse applications.

Over the next two to three years, we expect the share of private sector orders in our order book to increase steadily alongside STU procurement, particularly across employee transport, intercity, schools and tarmac services. At SWITCH Mobility, we are building a diversified portfolio to address both segments.

Can you share your approach to expanding the export business for e-buses?

The EV market is rapidly evolving, especially overseas. Our international expansion relies on a structured, phased approach. We are **prioritising right-hand-drive markets** where our existing platforms seamlessly align with local operational ecosystems.



Images from Apr 2026 when Switch completed the delivery of 100 e-buses to National Transport Corporation, Mauritius

We have already built a proud footprint, delivering **100 electric buses to Mauritius**, executing key cross-border deployments to **Nepal** and **Bhutan**, and engaging closely with transport authorities in **Seychelles** and **Sri Lanka**.

We also see strong demand in markets like the GCC, where we are already present.

Is OEM supply capacity the real constraint for the low volumes of electric bus and commercial vehicle registrations today?

No, OEM supply capacity is definitely not the bottleneck. As an industry, we have built robust, scalable production frameworks. At Switch, we can currently produce around **5,000 buses annually** through our facilities in North and South India, which can be **doubled quickly** as demand increases. The historically slower volume growth was down to early-stage ecosystem challenges. Today, the industry is entering a much stronger acceleration phase. With forward-thinking policies like the **₹10,900-crore PM e-Drive scheme**, mapping out long-term demand visibility and backing it up with charging infrastructure support, registrations are projected to scale up significantly. The capacity is ready; the market pull is what is expanding now.

How does the e-LCV business's path to viability differ from the bus business?

The operational and commercial dynamics between the two segments are very different. The Bus Segment is highly organised and long-term. We have adopted a **two-pronged strategy with buses – one is the GCC model and the latter is the retail model**. It operates heavily on the Gross Cost Contract (GCC) model with 12-year lifecycle horizons, where state undertakings look intensely at predictable per-kilometre operational savings. Retail market has a different pull where we see increase in demand.

On the other hand, the **e-LCV Segment** is still at an early **2-3% penetration** curve but highly agile and **retail-driven**. Demand is spread across B2B e-commerce logistics, municipal applications, and specialized formats like our **leV4 Reefer** for cold-chain transit. We sold around 1,600 e-LCVs last year and held over **40% market share**. Since eLCVs can give lower running costs, viability becomes an immediate possibility. A predictable mid-mile or last-mile urban route turns these vehicles into self-sustaining business assets much faster without relying solely on large institutional tenders.

What would be the one policy or ecosystem gap — beyond financing — that can accelerate e-bus and e-LCV adoption in India, if solved?

*If I had to highlight one vital area that needs immediate, coordinated focus, it is **power infrastructure readiness and depot electrification**.*

Under the PM e-Drive scheme alone, the government has provisioned support for 88,500 charging sites, reflecting a deliberate effort to build out charging capacity in step with vehicle deployment. While expanding public charging touchpoints is important, high-utilisation commercial fleets rely heavily on turnaround time and overnight depot charging.

As large-scale operations scale up, dense urban pockets will face exponential power loads. Streamlining utility coordination, securing faster multi-megawatt power approvals from local DISCOMs, and setting up smart, **grid-ready infrastructure right inside transport depots** will be the ultimate catalyst to unlock the next level of zero-emission transit in India.

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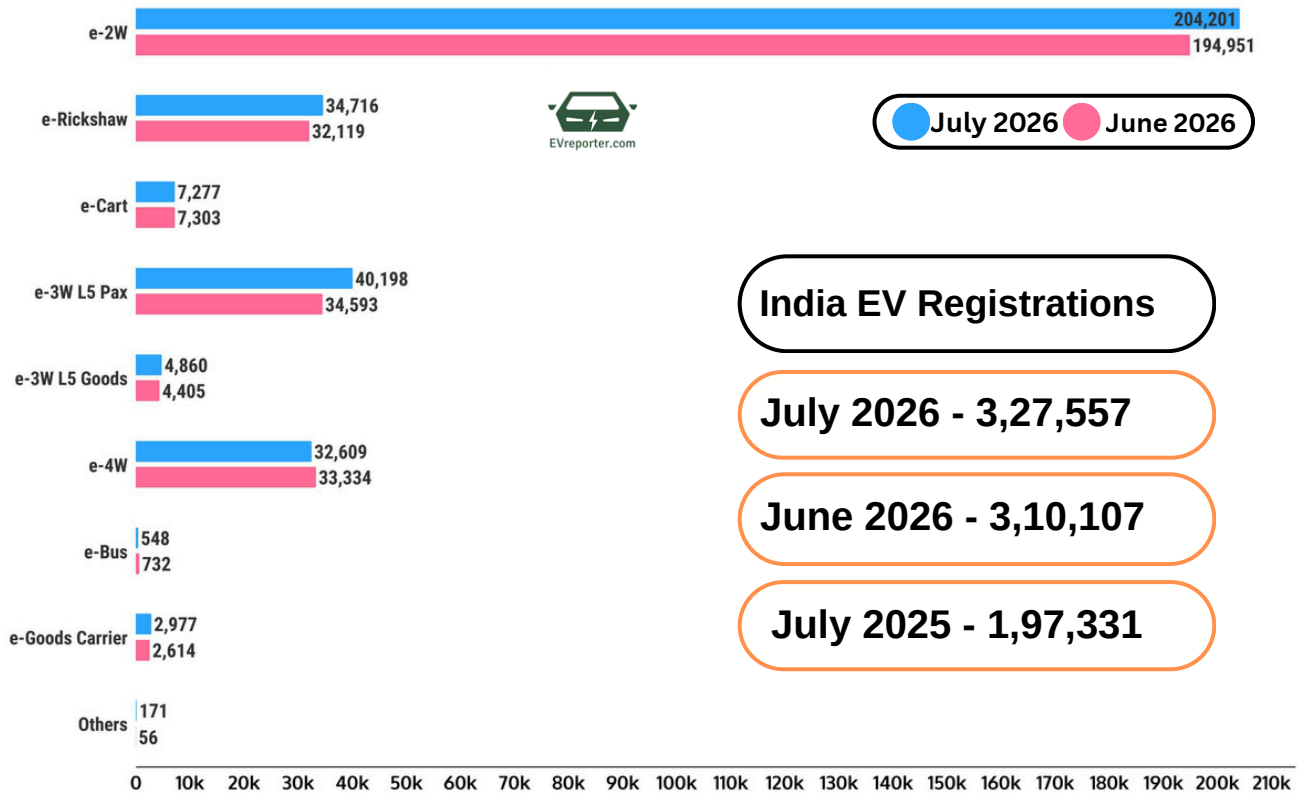
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Category-wise India EV Sales, Jul 2026

Total EV Registrations - Jul'26 - 3,27,557 | Jun'26 - 3,10,107



India EV Registrations

July 2026 - 3,27,557

June 2026 - 3,10,107

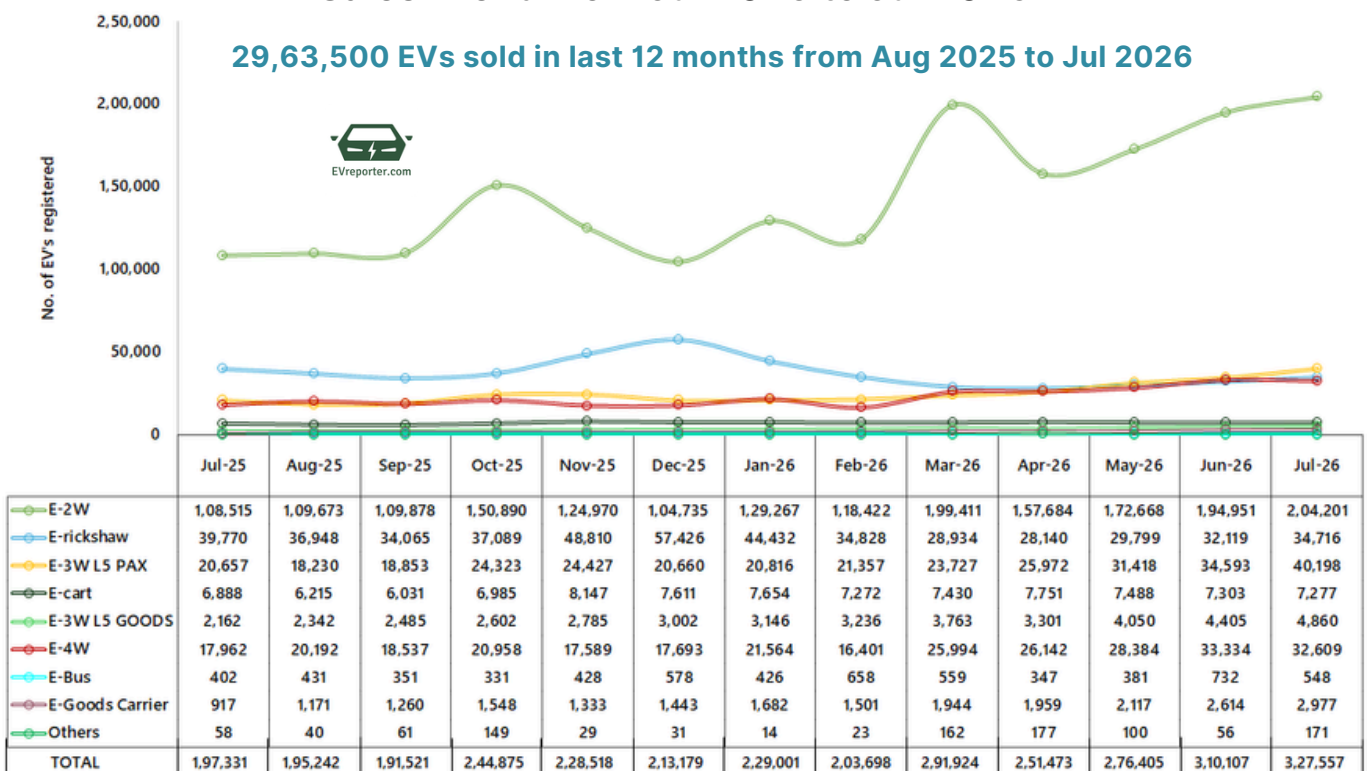
July 2025 - 1,97,331

'Goods Carrier' refers to N1, N2, N3 vehicles, including LCVs and HGVs, as categorised in Vahan dashboard. 'E-rickshaw' refers to low-speed electric 3Ws (up to 25 kmph) used for passenger transportation. 'E-cart' designates low-speed electric 3Ws (up to 25 kmph) used for goods transportation. 'L5M' stands for passenger 3W L5 vehicles, 'L5N' stands for Cargo 3W L5 vehicles.

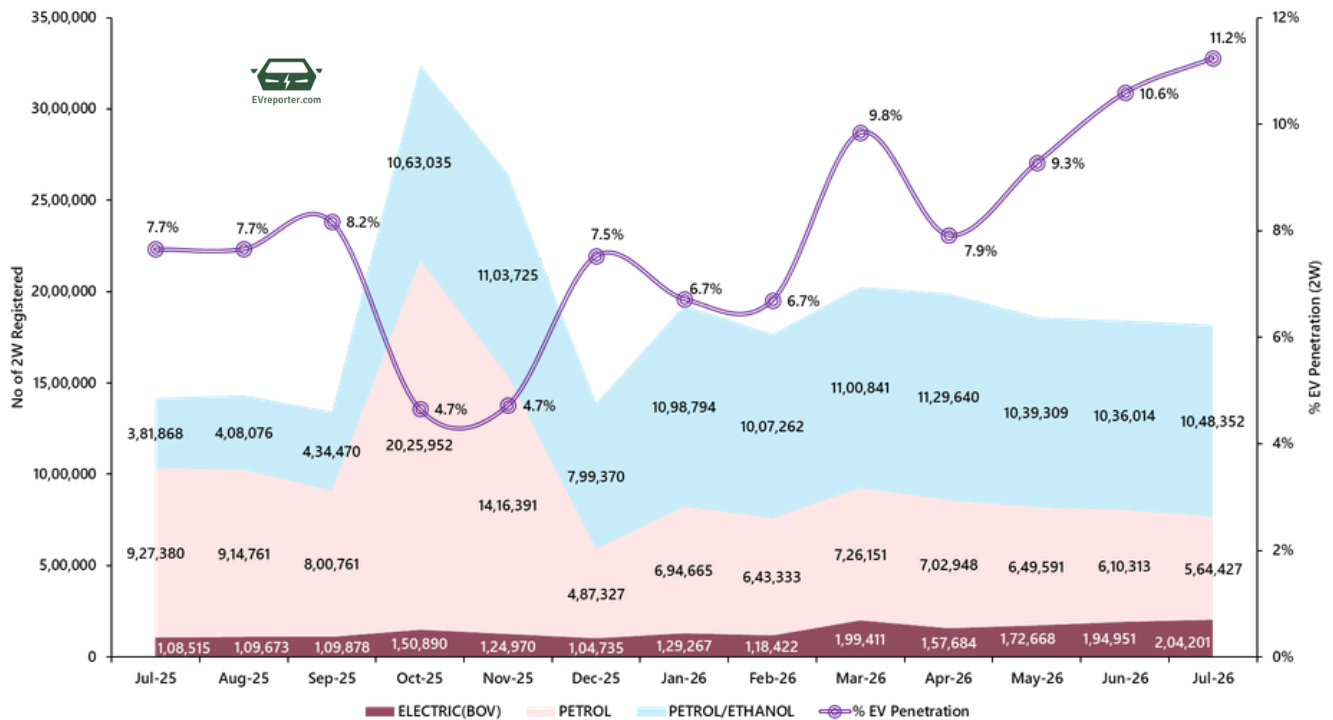
Source: Vahan Dashboard as of Aug 2, 2026. Low speed e-2W sales data not included.

Sales Trend from Jul 2025 to Jul 2026

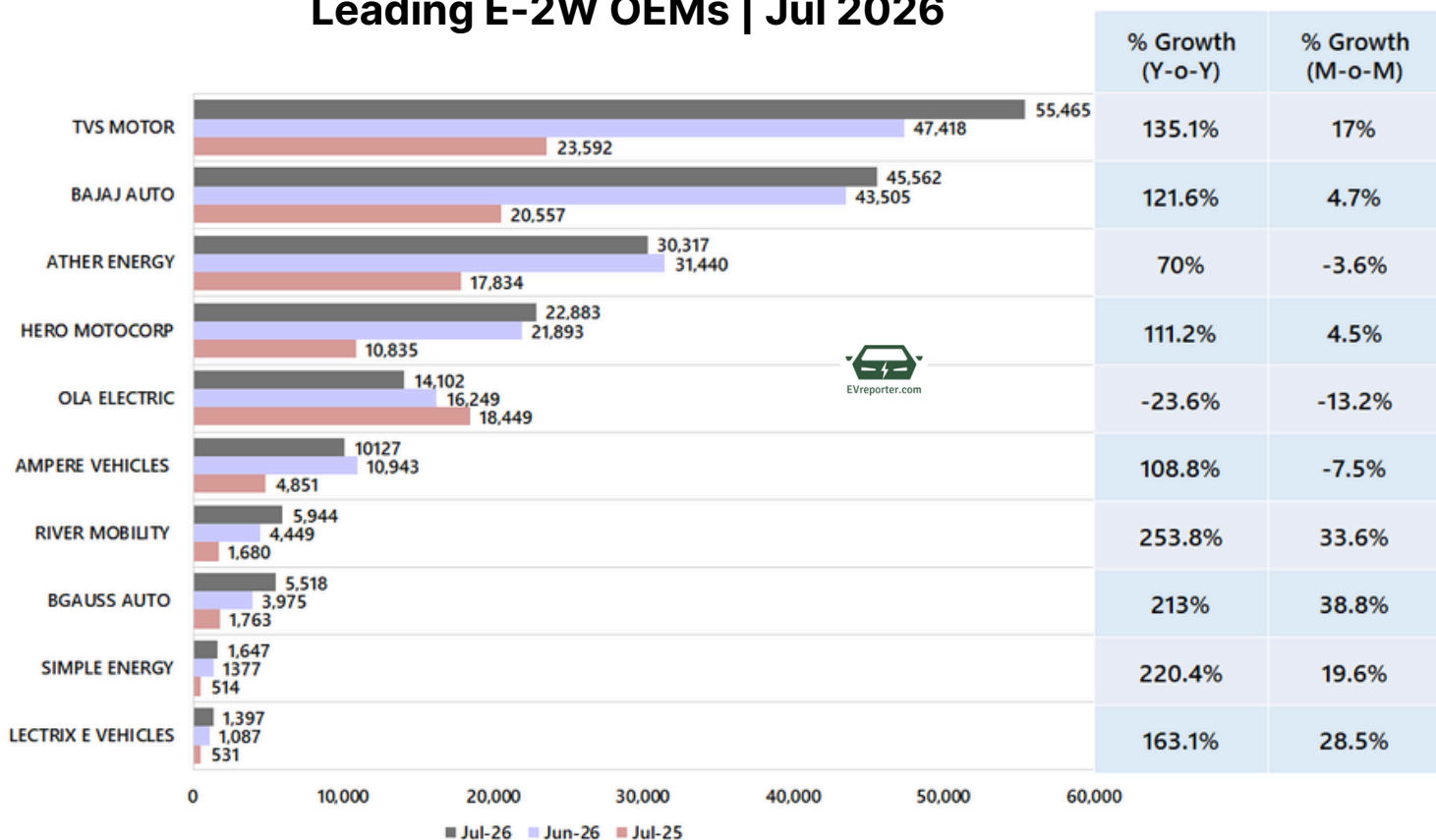
29,63,500 EVs sold in last 12 months from Aug 2025 to Jul 2026



Fuel wise 2W Sales Trend, Jul 2025 - Jul 2026



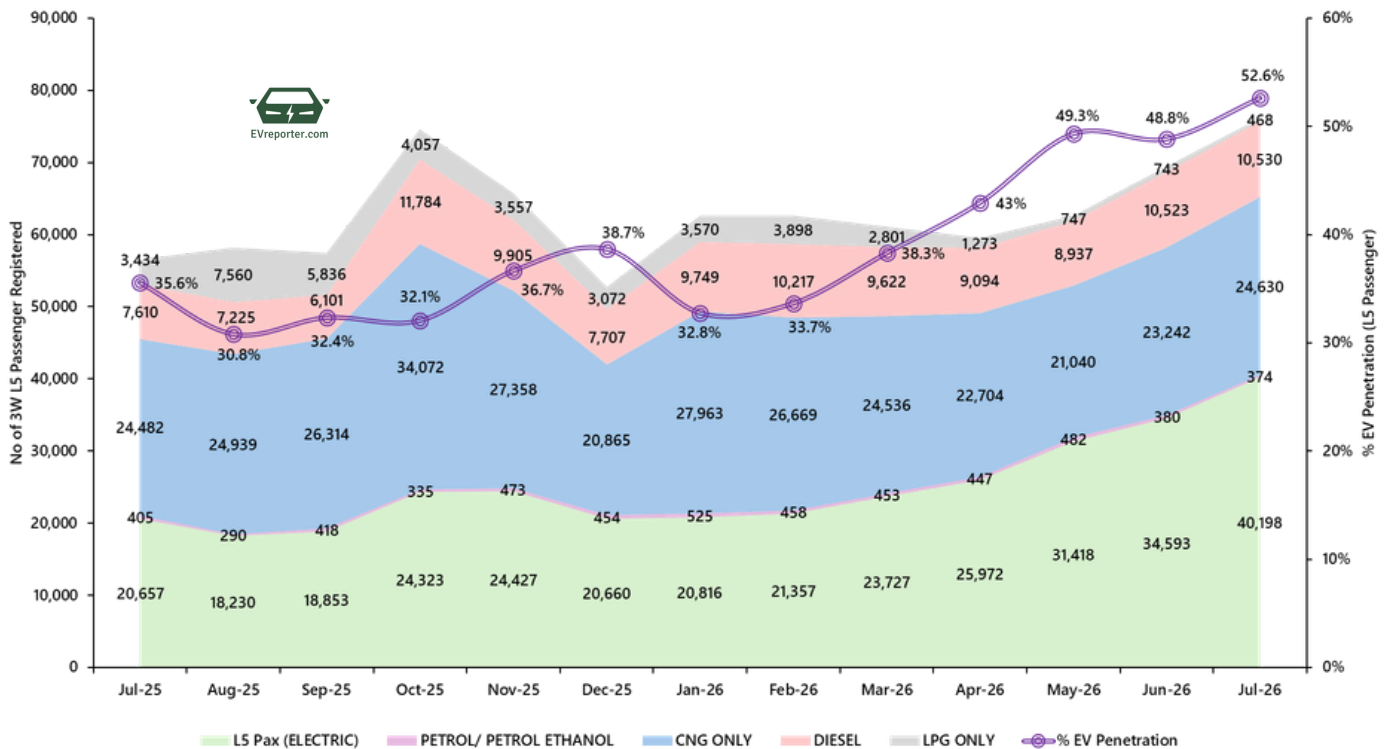
Leading E-2W OEMs | Jul 2026



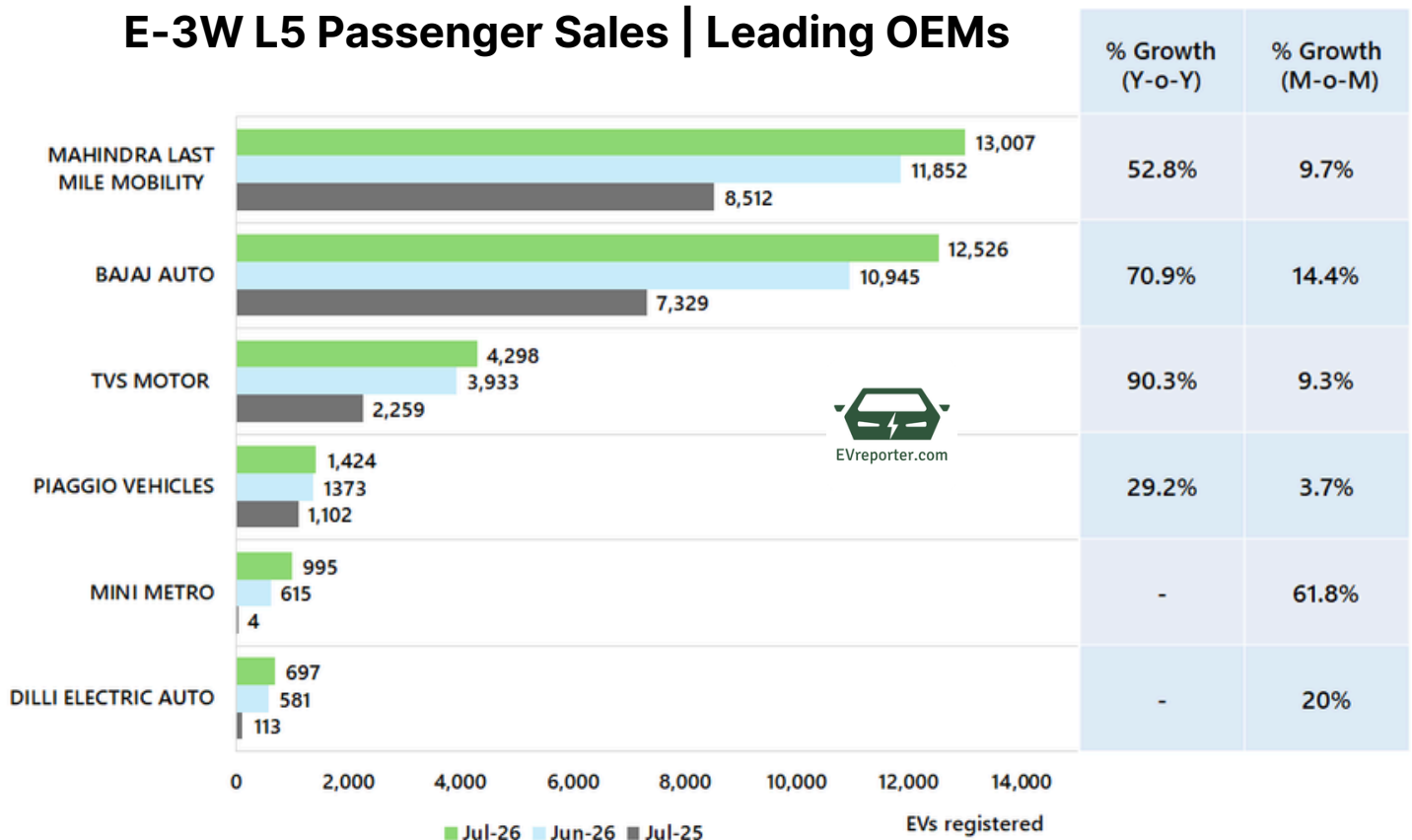
Source: Vahan Dashboard as of Aug 2, 2026. PAN India Data. Low speed e-2W sales data not included.

For deeper EV sale trends - state-wise, city-wise (70 cities), Top performing RTO data and OEM-wise performance, check out the [EVreporter Data Portal here](#).

Fuel-wise 3W L5 Passenger Sales Trend | Jul 2025 - Jul 2026



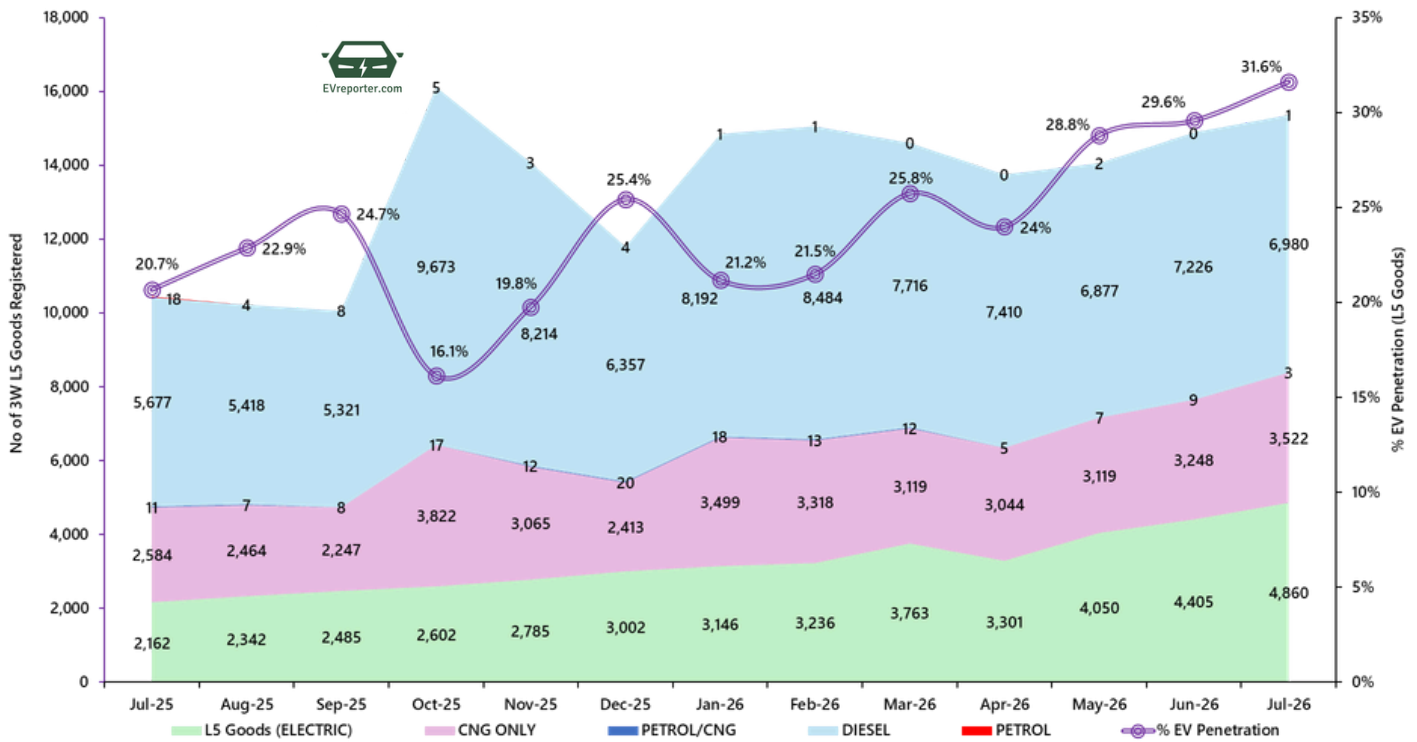
E-3W L5 Passenger Sales | Leading OEMs



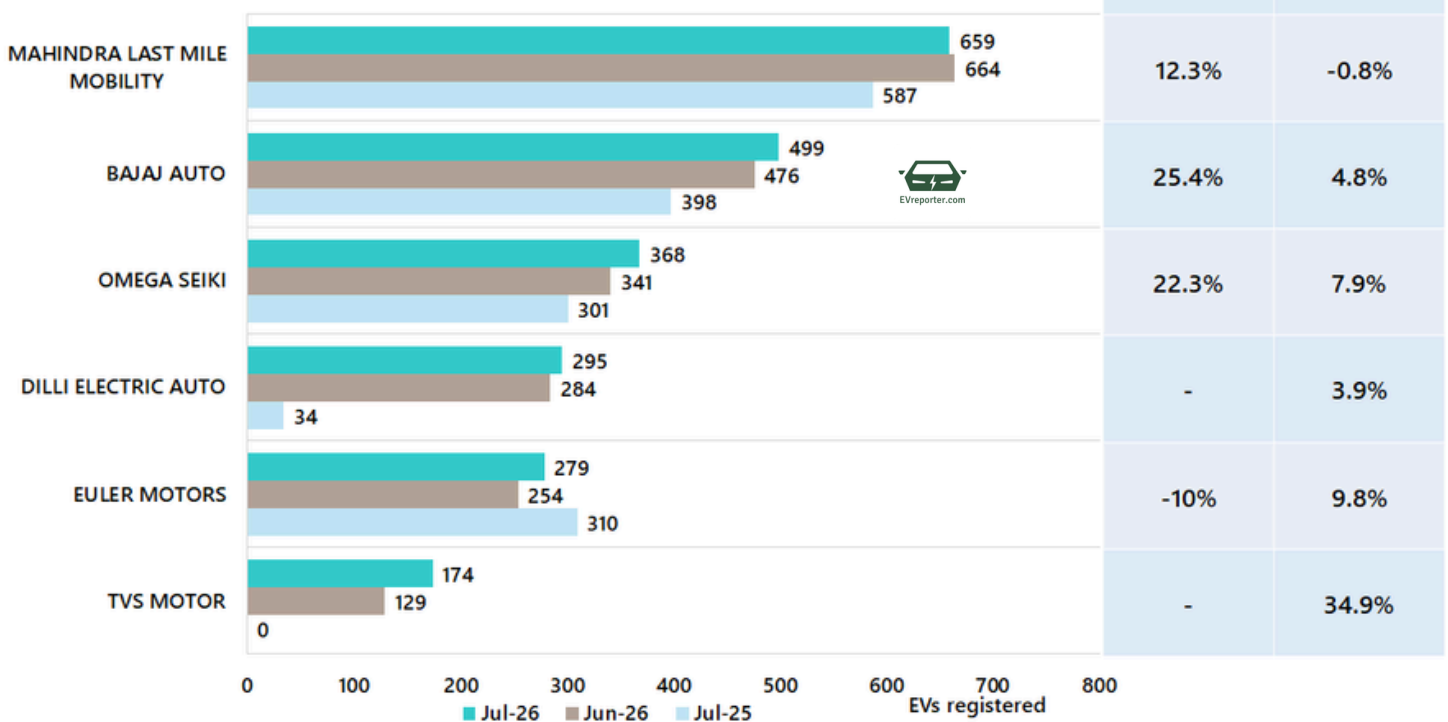
Source: Vahan Dashboard as of Jul 2, 2026. PAN India Data

For deeper EV sale trends - state-wise, city-wise (70 cities), Top performing RTO data and OEM-wise performance, check out the [EVreporter Data Portal here](#).

Fuel wise 3W L5 Goods Sales Trend | Jul 2025 - Jul 2026



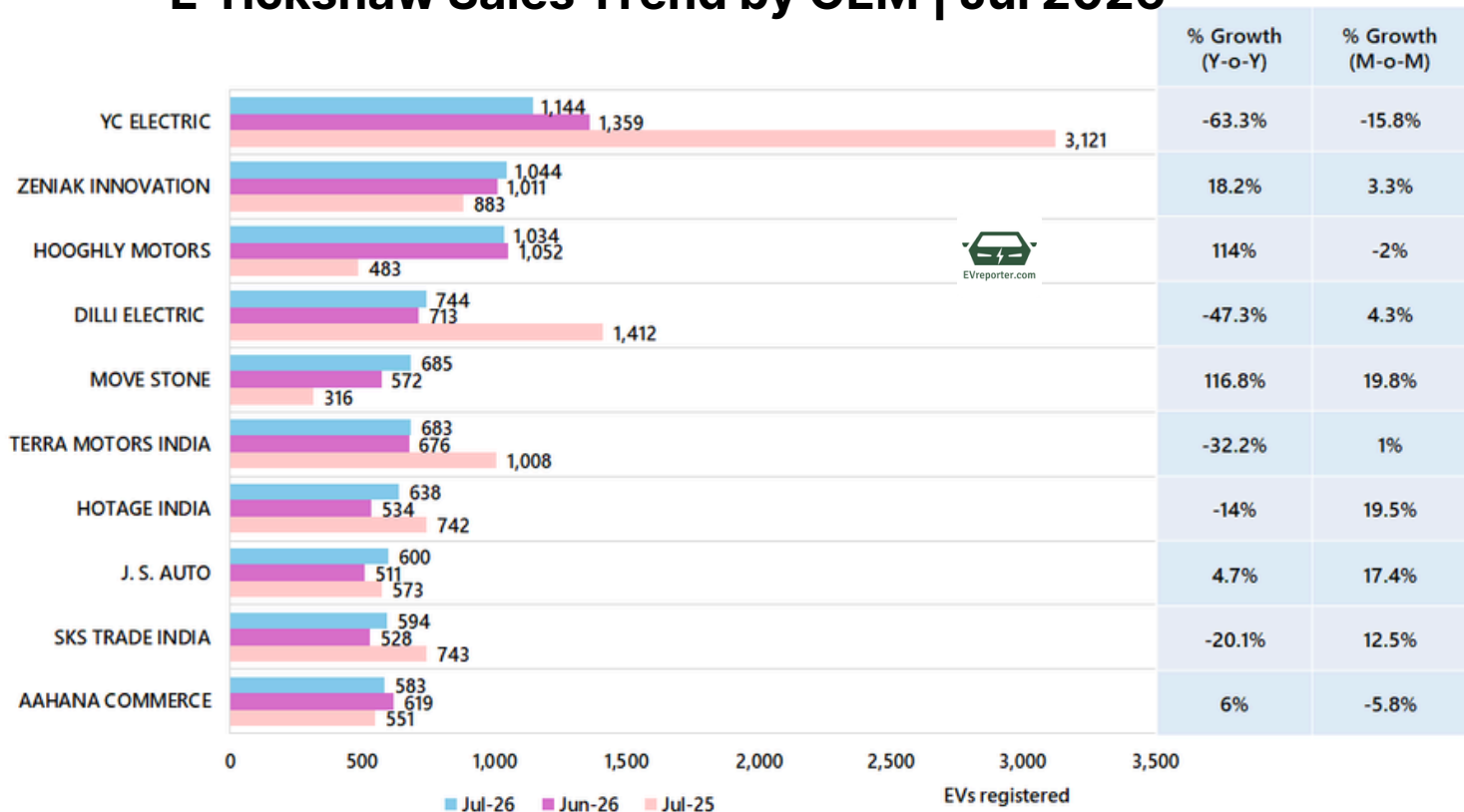
E-3W Goods L5 Sales | Leading OEMs



Source: Vahan Dashboard as of Aug 2, 2026. PAN India Data

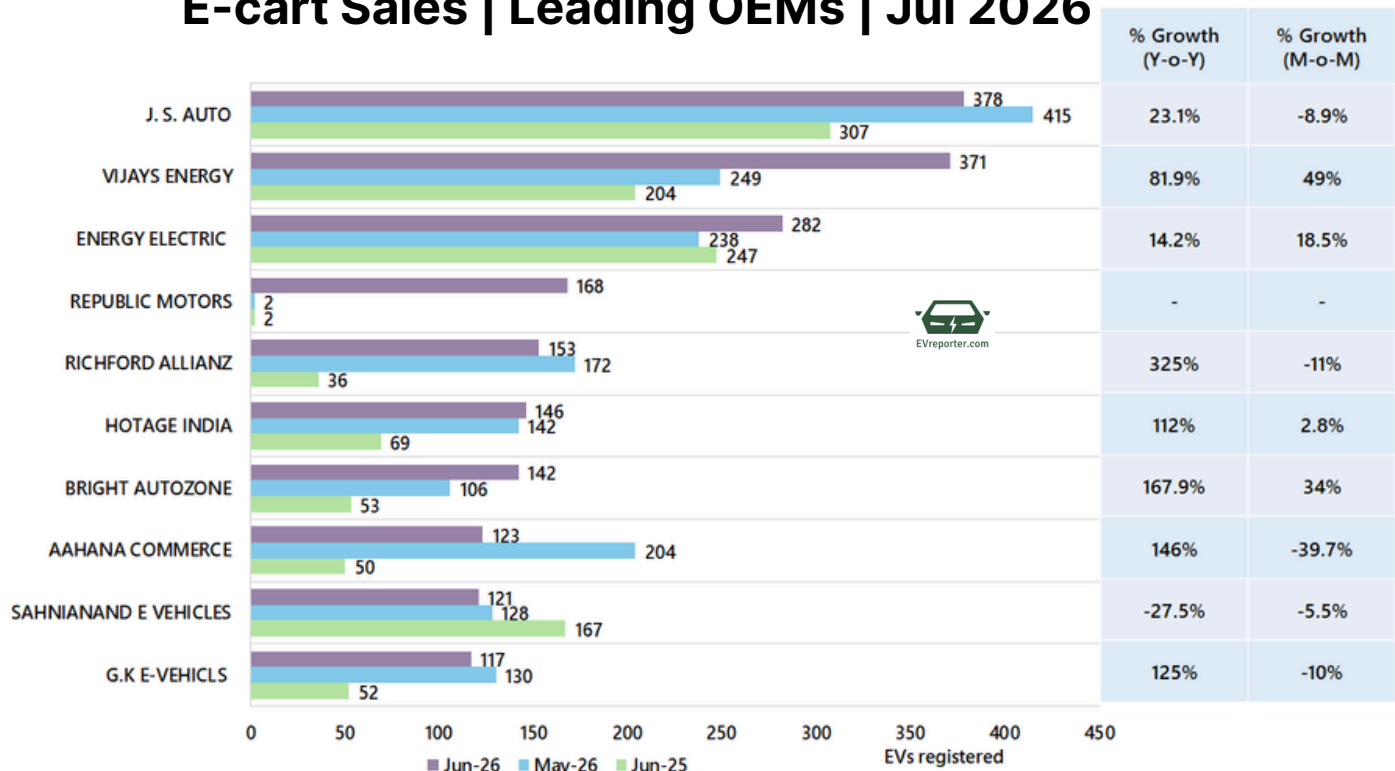
For deeper EV sale trends - state-wise, city-wise (70 cities), Top performing RTO data and OEM-wise performance, check out the [EVreporter Data Portal here](#).

E-rickshaw Sales Trend by OEM | Jul 2026



Source: Vahan Dashboard as of Aug 2, 2026.

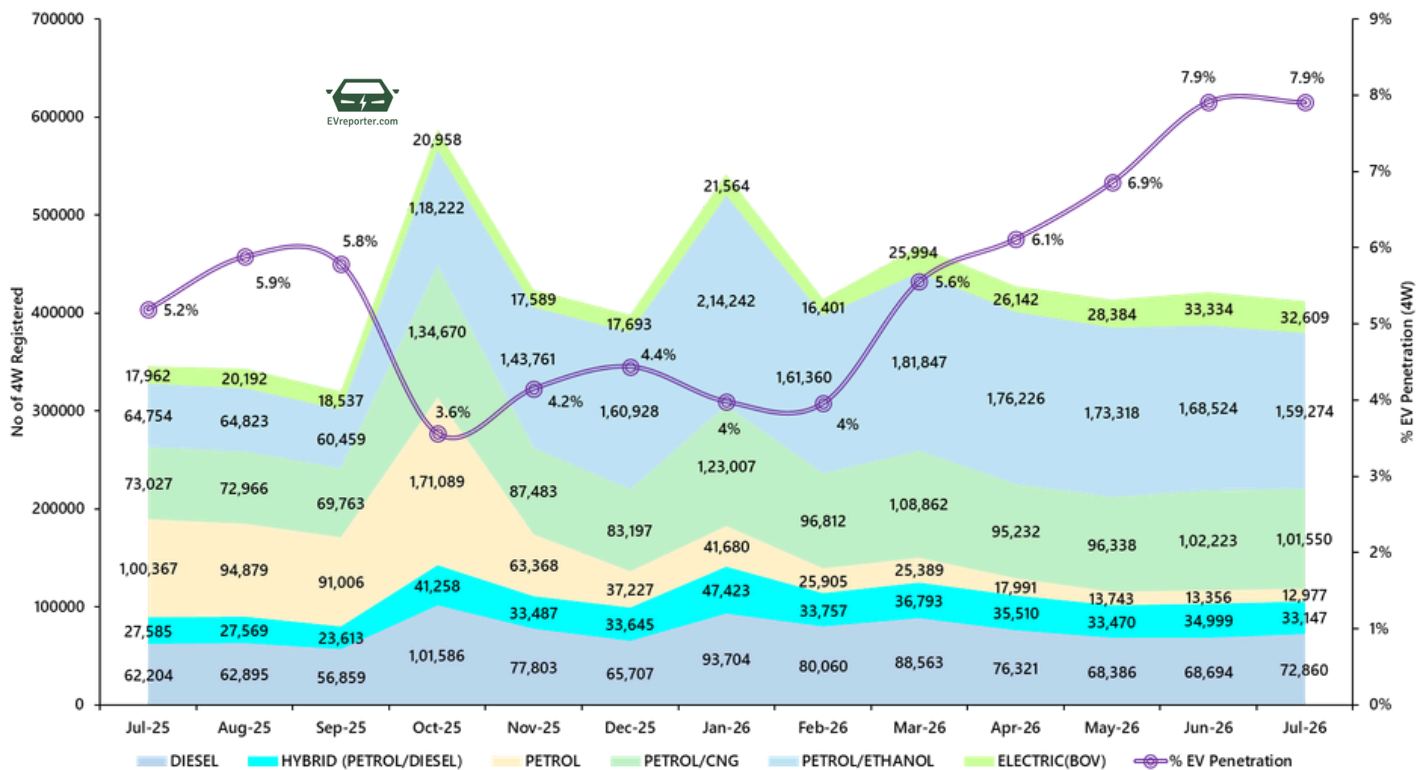
E-cart Sales | Leading OEMs | Jul 2026



Source: Vahan Dashboard as of Aug 2, 2026.

For deeper EV sale trends - state-wise, city-wise (70 cities), Top performing RTO data and OEM-wise performance, check out the [EVreporter Data Portal here](#).

Fuel wise Car Sales Trend | Jul 2025 - Jul 2026



Electric Car Sales Trend by OEM | Jul 2026

S No.	Makers	Jul-26	Jun-26	Difference	% Change	Market Share Jul-26
1	TATA MOTORS	13,583	12,789	794	6.2%	41.7%
2	MAHINDRA & MAHINDRA	7,678	8,176	-498	-6.1%	23.5%
3	JSW MG MOTOR INDIA	5,642	6,180	-538	-8.7%	17.3%
4	MARUTI SUZUKI INDIA	1,590	1,999	-409	-20.5%	4.9%
5	VINFAST AUTO INDIA	1,478	1,448	30	2.1%	4.5%
6	BYD INDIA	742	926	-184	-19.9%	2.3%
7	HYUNDAI MOTOR INDIA	565	374	191	51.1%	1.7%
8	KIA INDIA	464	539	-75	-13.9%	1.4%
9	BMW INDIA	367	517	-150	-29%	1.1%
10	MERCEDES -BENZ AG	163	243	-80	-32.9%	0.5%
11	TOYOTA KIRLOSKAR	123	35	88	251.4%	0.4%
12	TESLA INDIA	115	38	77	202.6%	0.4%
13	STELLANTIS AUTOMOBILES	51	28	23	82.1%	0.2%
14	OTHERS	48	42	6	14.3%	0.1%
TOTAL		32,609	33,334	-725	-2%	100%

Source: Vahan Dashboard as of Aug 2, 2026.

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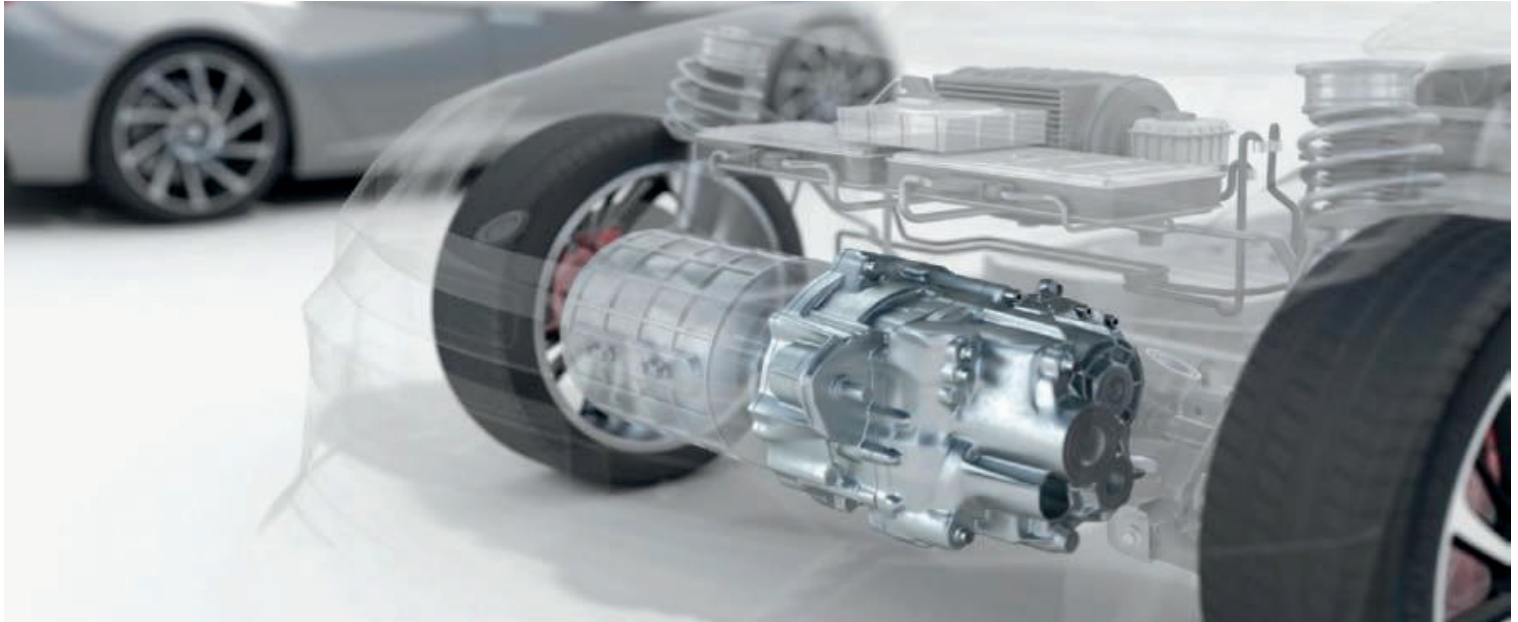
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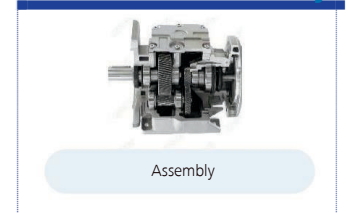


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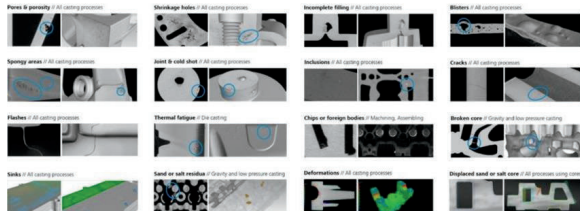
Structured Parts Manufacturing



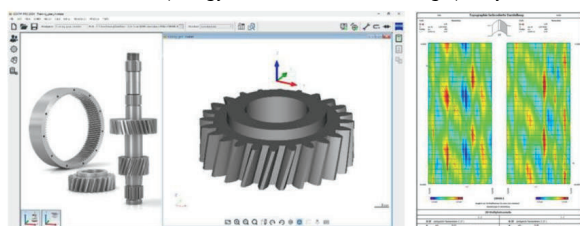
Transmission Assembly



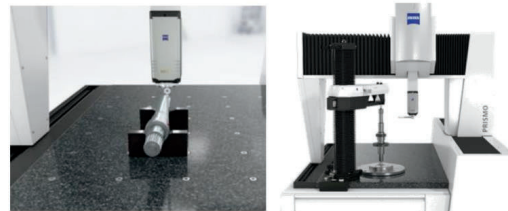
Housing internal defect inspection



Gear validation, topology correction, and meshing quality



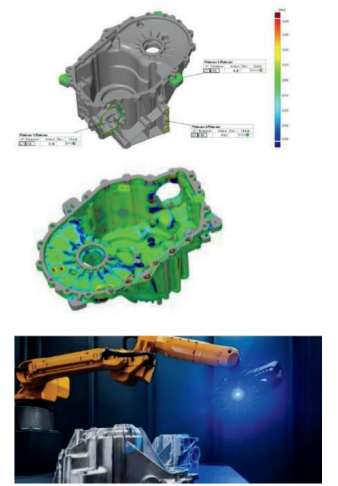
Shaft concentricity and runout measurement



Measurement of the bearing waviness, roughness, and taper



Virtual assembly and NVH analysis



OEM wise Electric Bus Sales | Jul 2026

S No.	Makers			Jul-26	Jun-26	Difference	% Change	Market Share Jul-26
1	OLECTRA GREENTECH			132	127	5	3.9%	24.1%
2	JBM ELECTRIC VEHICLES			118	118	0	-	21.5%
3	PMI ELECTRO MOBILITY			118	176	-58	-33%	21.5%
4	SWITCH MOBILITY			53	175	-122	-69.7%	9.7%
5	PINNACLE MOBILITY			52	52	0	-	9.5%
6	VE COMMERCIAL			41	42	-1	-2.4%	7.5%
7	AEROEAGLE AUTOMOBILES			24	11	13	118.2%	4.4%
8	TATA MOTORS			5	21	-16	-76.2%	0.9%
9	OTHERS			5	10	-5	-50%	0.9%
	TOTAL			548	732	-184	-25.1%	100%

OEM wise E-Goods Carrier Sales | Jul 2026

S No.	Makers			Jul-26	Jun-26	Difference	% Change	Market Share Jul-26
1	TATA MOTORS			1,301	1,121	180	16.1%	43.7%
2	EULER MOTORS			777	730	47	6.4%	26.1%
3	MAHINDRA LAST MILE MOBILITY			363	333	30	9%	12.2%
4	SWITCH MOBILITY			135	130	5	3.8%	4.5%
5	TIVOLT ELECTRIC VEHICLES			129	81	48	59.3%	4.3%
6	VE COMMERCIAL			75	54	21	38.9%	2.5%
7	IPL TECH ELECTRIC			59	32	27	84.4%	2%
8	SANY HEAVY INDUSTRY INDIA			43	41	2	4.9%	1.4%
9	ENERGY IN MOTION			42	21	21	100%	1.4%
10	QUCEV TECHNOLOGIES			22	1	21	2100%	0.7%
11	OTHERS			31	70	-39	-55.7%	1%
	TOTAL			2,977	2,614	363	13.9%	100%

'Goods Carrier' refers to N1, N2, N3 cargo vehicles, including LCVs and HGVs, as categorised in Vahan dashboard.

Source: Vahan Dashboard as of Aug 2, 2026.



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EV Penetration for Different Vehicle Category Sales in India

Category	Jul-26	Jun-26	Jul-25
2W	11.2%	10.6%	7.7%
3W L5M 	52.6%	48.8%	35.6%
3W L5N	31.6%	29.6%	20.7%
4W	7.9%	7.9%	5.2%
Goods Carrier	3.6%	3.4%	1.4%

Source: Vahan Dashboard as of Aug 2, 2026.

'Goods Carrier' refers to N1,N2,N3 cargo vehicles, including LCVs and HGVs, as categorised in Vahan dashboard. 'L5M' stands for passenger 3W L5 vehicles, 'L5N' stands for Cargo 3W L5 vehicles.

ICE vs EV Sales & Penetration Trend

- India's EV Sales Trend for July 2026 shows sizable growth in monthly sales volume.
- July 2026 EV penetration for 2Ws climbed to 11.2% (highest ever), up from 7.7% last year.
- The **passenger vehicle category recorded the highest EV penetration to date at 7.9%.**
- The L5 Passenger segment recorded its highest-ever EV penetration of 52.6%.**
- The Goods Carrier category is gathering pace, with EV penetration rising to 3.6% from 1.4% the year before.
- Bajaj Auto attributed 25% of its July 2W sales to EVs**, while EV penetration for TVS 2Ws was 14.8%. 98% of **Mahindra Last Mile Mobility's** passenger 3W sales were electric. Over 64% of TVS Motors' passenger 3W sales were electric.
- ~81% of JSW MG Motor India's** sales in July 2026 were EVs. EV penetration in the car category stood at **23%+ for Tata Motors, 21%+ for BMW India and 13.8% for Mahindra.**

WHAT'S NEW?

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- ✓ India FY25-26 EV sales & investment report
- ✓ E-2W & 4W Sales Forecast till FY 2030
- ✓ Quarterly EV sales reports
- ✓ Top 70 Cities and Top Performing RTO EV Sales Data

- ✓ India Q1 FY26-27 EV Sales Report (Coming soon)
- ✓ E-goods carrier (LCVs and HCVs breakup)
- ✓ EV Companies Investment Tracker
- ✓ Telangana Data included
- ✓ Break-up of L3M, L3N, L5M, L5N for e-3Ws



This section aims to showcase the part of EV sales for top-selling OEMs in the two-wheeler, three-wheeler and passenger vehicle categories.

India's Top 2W OEMs | ICE vs EV Sales for Jul 2026

S No.	Maker		Total Sales Jul-26	ICE	EV	% EV
1	HONDA MOTORCYCLE		4,69,466	4,68,529	937	0.2%
2	HERO MOTOCORP		4,40,537	4,17,654	22,883	5.2%
3	TVS MOTOR		3,73,882	3,18,417	55,465	14.8%
4	BAJAJ AUTO		1,80,041	1,34,479	45,562	25%
5	SUZUKI MOTORCYCLE		1,02,546	1,01,948	598	0.04%
6	ROYAL-ENFIELD		94,737	94,712	25	0.03%
7	INDIA YAMAHA MOTOR		67,731	67,564	167	0.2%
8	ATHER ENERGY		30,317	0	30,317	100%
9	OLA ELECTRIC		14,102	0	14,102	100%
10	AMPERE VEHICLES		10,127	0	10,127	100%

Source: Vahan Dashboard as of Aug 2, 2026.

India's Top 3W Pax Auto OEMs | ICE vs EV Sales for Jul 2026

S No.	Maker		Total Sales Jul-26	ICE	EV	% EV
1	BAJAJ AUTO		38,716	26,190	12,526	32.4%
2	MAHINDRA LAST MILE MOBILITY		13,273	266	13,007	98%
3	PIAGGIO VEHICLES		6,724	5,300	1,424	21.2%
4	TVS MOTOR		6,685	2,387	4,298	64.3%
5	ATUL AUTO		1,477	1,232	245	16.6%
6	MINI METRO		995	0	995	100%
7	DILLI ELECTRIC AUTO		697	0	697	100%
8	OMEGA SEIKI		498	0	498	100%

Source: Vahan Dashboard as of Aug 2, 2026.

For EV sales, including e-goods carriers (LCV / HCV categorisation), state-wise, city-wise (70 cities), top-performing RTO data, and OEM-wise performance, check out [EVreporter Data Portal here](#).

India's Top 3W Goods Auto OEMs | ICE vs EV Sales for Jul 2026

S No.	Maker	Total Sales Jul-26	ICE	EV	% EV
1	BAJAJ AUTO	5,773	5,274	499	8.6%
2	PIAGGIO VEHICLES	2,873	2,768	105	3.7%
3	ATUL AUTO	1,394	1,311	83	6%
4	MAHINDRA LAST MILE MOBILITY	1,025	366	659	64.3%
5	TVS MOTOR	608	434	174	28.6%
6	OMEGA SEIKI	368	0	368	100%
7	DILLI ELECTRIC AUTO	295	0	295	100%
8	EULER MOTORS	279	0	279	100%

India's Top 4W OEMs | ICE vs EV Sales for Jul 2026

S No.	Maker	Total Sales Jul-26	ICE	EV	% EV
1	MARUTI SUZUKI INDIA	1,61,372	1,59,782	1,590	1%
2	TATA MOTORS	58,418	44,835	13,583	23.3%
3	MAHINDRA & MAHINDRA	55,588	47,910	7,678	13.8%
4	HYUNDAI MOTOR INDIA	47,688	47,123	565	1.2%
5	TOYOTA KIRLOSKAR MOTOR	29,017	28,894	123	0.4%
6	KIA INDIA	25,401	24,937	464	1.8%
7	SKODA AUTO VOLKSWAGEN INDIA	8,110	8,110	0	-
8	JSW MG MOTOR INDIA	6,976	1,334	5,642	80.9%
9	HONDA CARS	5,783	5,783	0	-
10	RENAULT INDIA	3,490	3,490	0	-
11	NISSAN MOTOR INDIA	2,684	2,684	0	-
12	BMW INDIA	1,697	1,330	367	21.6%
13	MERCEDES BENZ	1,522	1,359	163	10.7%
14	VINFAST AUTO INDIA	1,478	0	1,478	100%

Source: Vahan Dashboard as of Aug 2, 2026.

WHAT'S NEW?

EVREPORTER DATA PORTAL

For paid subscribers only



- ✓ India FY25-26 EV sales & investment report
- ✓ E-2W & 4W Sales Forecast till FY 2030
- ✓ Quarterly EV sales reports
- ✓ Top 70 Cities and Top Performing RTO EV Sales Data

- ✓ India Q1 FY26-27 EV Sales Report (Coming soon)
- ✓ E-goods carrier (LCVs and HCVs breakup) data
- ✓ EV companies Investment Tracker
- ✓ Telangana Data included
- ✓ Break-up of L3M, L3N, L5M, L5N for e-3Ws



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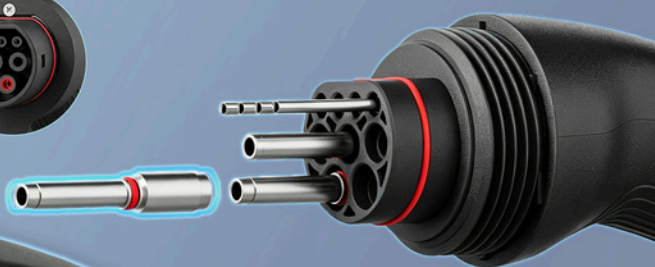


Compliant with
IS 17017-2-7



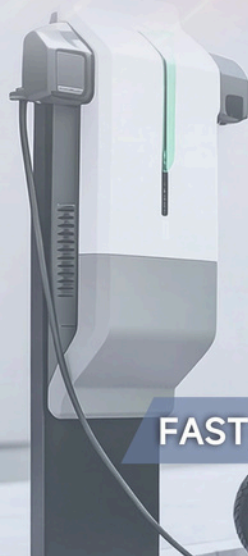
2-Minute Maintenance

Replaceable Power Pin Design



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Application



FAST CHARGING STATION



WALL CHARGER

Engineering plastics solutions for E-mobility applications

XYRON™ modified polyphenylene ether [mPPE]



Solution for AIS156 Thermal Propagation & Fire Test

Excellent flammability class

Grade/UL94	V-0 (mmt)	5VA (mmt)
XYRON™ 340Z	0.75	2.5
XYRON™ 540Z	0.75	2.5
XYRON™ 443Z	0.75	2.5
XYRON™ G601Z	1.50	2.0

Burn Test for Li-B applications⁴

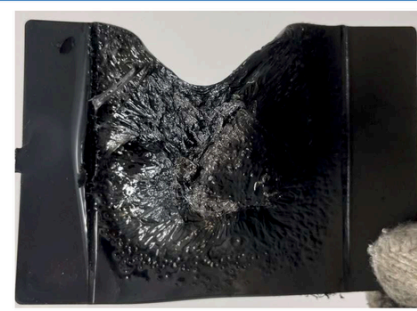
FR PC/ABS



XYRON™ 540Z



XYRON™ 443Z



Burn temp: 850°C
Burn time: 0 min 58 secs
Burn through: Yes
Drip: No

Burn temp: 850°C
Burn time: 2 min 19 secs
Burn through: Yes
Drip: No

Burn temp: 850°C
Burn time: 2 min 58 secs
Burn through: Yes
Drip: No

Burn test method:
Angle of flame: 20°, Thickness: 3 mm
Flame: Blue tip at the center of the plate
Time start: When the fire is turn on
Time stop: When burn through happen

⁵Advantages of XYRON™

Value proposition		Property	XYRON™	PC	PC/ABS
Energy efficiency due to low weight		Low specific gravity	●	●	●
Structural integrity for large and complex designs		Dimension stable	●	●	●
Battery Safety AIS-156	Fire resistance test with thin plate	Thickness ⁴	●	●	●
	1m drop test	Impact strength ¹	●	●	●
	Direct/indirect contact of water	Impact strength (after aging) ²	●	●	●
	Thermal shock test	Impact strength (after aging) ³	●	●	●

Note:
1 – Notched Charpy Impact ISO179
2 – Notched Charpy Impact ISO179 after conditioned using Internal Method: -20°C to 85°C/85%RH for 10 cycles.
3 – Notched Charpy Impact ISO179 after conditioned using AIS-156 – Thermal shock: -40°C to 80°C for 10 cycles.
4 – Asahi Kasei Method
5 – Result shown are estimates comparison conducted by Asahi Kasei

● Excellent
● Good

AsahiKASEI

XYRON™ LEONA™ TENAC™ TENAC-C™

PRODUCTS

Asahi Kasei Plastics Singapore Ptd Ltd
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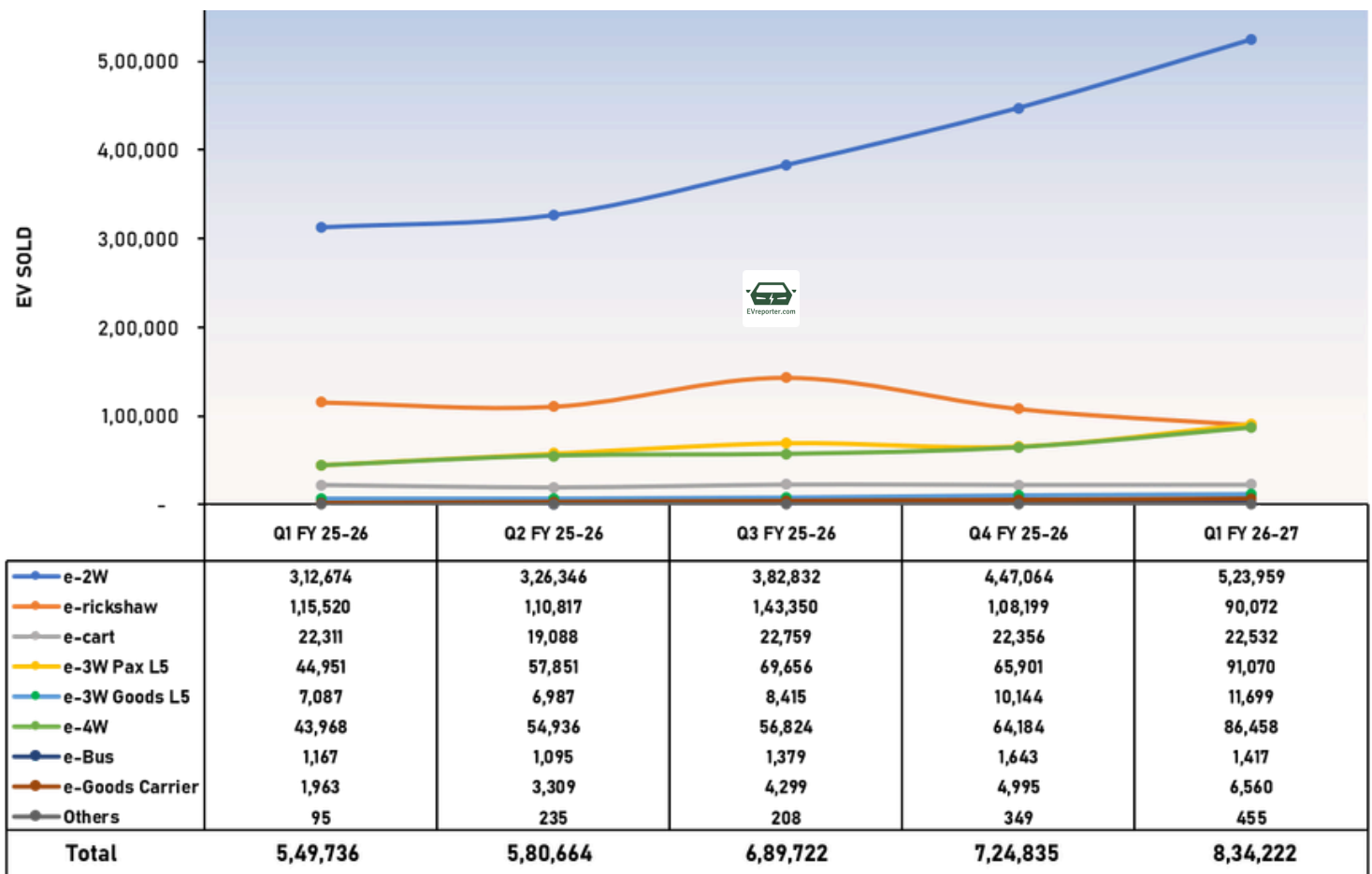
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India Registers 8,34,222 EVs in Q1 FY2026-27

10.6% EV Penetration in Overall Automotive Sales

Trend from last 5 quarters - Q1 FY25-26 to Q1 FY26-27 (Apr 2025 to Jun 2026)



Source: EVreporter Q1 FY26-27 Report, Data from Vahan dashboard. Low-speed 2W data not included.

'Goods Carrier' refers to 4W cargo vehicles, including LCVs and HGVs (N1, N2, N3), as categorised in the Vahan dashboard. 'E-rickshaw' refers to low-speed electric 3Ws (up to 25 kmph) used for passenger transportation. 'E-cart' designates low-speed electric 3Ws (up to 25 kmph) used for goods transportation.

India's total automotive sales in Q1 FY26-27 were 78,81,905, of which 8,34,222 were EVs, which means 10.6% EV penetration in the quarter.

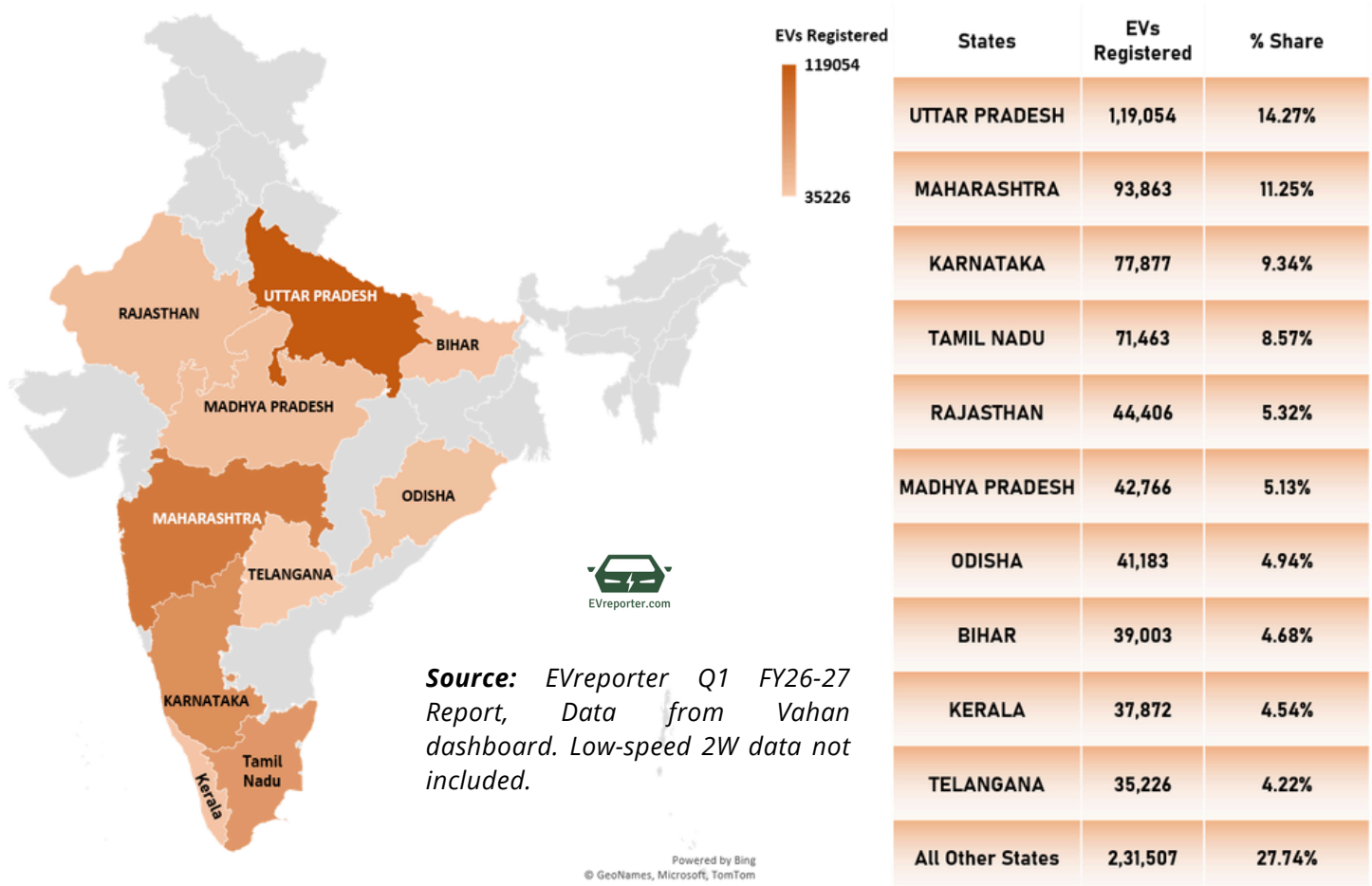
- In Q1 FY 26-27, the **EV penetration in the 3W L5 passenger category reached an impressive 46.9%**, up from 34.9% in Q4 FY 25-26.
- EV Penetration for **2Ws increased, accounting for 9.2%** of total 2W sales in India in Q1 FY 26-27 as compared to 7.8% in the last quarter.
- EV penetration in the **4W segment increased to 6.9%** of total car sales in India in Q1.

Vehicle Category-wise EV Penetration in Q1 2026-27 vs Q4 2025-26

Vehicle Category	EV Sales Q1 FY 2026-27	Total Sales Q1 FY 2026-27	% EV Penetration Q1 FY 2026-27	EV Sales Q4 FY 2025-26	Total Sales Q4 FY 2025-26	% EV Penetration Q4 FY 2025-26
e-2W 	5,23,959	56,84,283	9.2% 	4,47,064	57,17,848	7.8%
e-3W (L5M) Pax	91,070	1,93,980	46.9% 	65,901	1,88,897	34.9%
e-3W (L5N) Goods	11,699	42,511	27.5% 	10,144	44,515	22.8%
e-4W	86,458	12,55,758	6.9% 	64,184	14,27,225	4.5%
e-Bus	1,417	21,705	6.5% 	1,643	17,598	9.3%
e-Goods Carrier	6,560	2,27,414	2.8% 	4,995	2,76,175	1.8%

Note - 3W E-rickshaw and E-carts not considered for calculation of segment-wise EV penetration.
L5M - passenger 3W L5 vehicles | L5N - Cargo 3W L5 vehicles

EV Sales in Leading Indian States in Q1 FY 26-27



Full Q1 FY2026-27 Report, including OEM sales, compilation of new vehicle launches, investment commitments, and policy updates, is available on [EVreporter Data Portal - data.EVreporter.com](https://data.EVreporter.com).

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Inside Amara Raja's Customer Qualification Plant for Lithium-ion Cells

A Conversation with **Vikramadithya Gourineni**

In July 2026, Amara Raja Advanced Cell Technologies commissioned its Customer Qualification Plant (CQP) at its Giga Corridor in Telangana, an initial **60 MWh facility** built to manufacture cylindrical and prismatic lithium-ion cells across multiple chemistries. Cells from the plant are expected to go to customers for **validation starting August 2026**.

The CQP represents ~₹500 crore of investment, part of Amara Raja's Phase 1 outlay of over ₹1,500 crore under its ₹9,500 crore Giga Corridor programme, and will feed into the company's **2 GWh commercial cell manufacturing line, slated to begin production next year**.

EVreporter spoke to Vikramadithya Gourineni, Executive Director at Amara Raja Energy & Mobility, about how the company's strategy has evolved, and where things stand on sourcing, OEM engagement, and the road to commercialisation.

In practice, what does 'customer qualification' mean for Amara Raja before commissioning the first 2 GWh line?

Generally speaking, when we want to enter an automotive account, we submit up to 3 categories of samples – A, B, and C. This mirrors exactly our own three-tier industrialisation architecture of R&D, Qualification, and Commercialisation.

- The **A sample** is an early functional prototype meant to validate the cell design and chemistry which we provide from the pilot line at our **R&D facility, 'ePositive Energy Labs'**.

- The **Customer Qualification Plant, or CQP, will deliver the B sample**, which validates the manufacturability of the product using processes that closely imitate what we will deploy at our future gigafactories.
- The final **C sample is the production version delivered at the gigafactory.**



In this case, validation goes beyond simply supplying samples, but ensures that the product developed in a lab can be translated to repeatable, economically viable manufacturing. We produce large enough batches of cells to prove out safety, reliability, final product integration and field testing, among other things.

The technology licensing agreements seem not to have progressed as anticipated due to geopolitical developments. Whose cell technology is the CQP actually built on today, and how has that changed from what was originally envisaged?

Our technology strategy has evolved significantly over the past few years. We had **originally pursued external technology partnerships** to accelerate our entry into cell manufacturing with a greater degree of customer credibility and less risk on the critical parameters like product technology, process efficacy, and supply chain. As circumstances evolved, collaboration in the manner we envisaged could not proceed. Increased investment into internal technology development was always part of the long-term plan.

“As a result, we front-loaded our investments into R&D infrastructure and talent. Today, neither ePositive Labs nor the CQP are dependent on any external technology partner.”

They are multi-chemistry, multi-format, flexible design platforms where we can develop, validate, and industrialize both internally developed technologies and anything gained in collaboration with partners. Similarly, the cells we are now working to commercialize are also a result of in-house development, but it is worth noting that **we worked closely with equipment suppliers to validate our manufacturing processes.**

Our most important goal today is to accumulate capabilities and develop people. We learned this through earlier technology tie-ups when we launched lead-acid batteries. A product or process can be shared, experts can be hired, but long term success is only possible through building enduring systems, processes, and local talent pools.

Is Amara Raja still committed to 2170 NMC as the first mass-production line in 2027?

Yes, the **2170 cell remains the first cell that will be commercialized in our gigafactory next year.** Despite some evolution in the types of cells being used today, this cell remains the most used in the electrical two-wheeler segment and continues to see strong adoption across many other domains such as power tools, AGVs, and drones among others.



The value of commercialising the 2170 goes well beyond the individual product. It allows us to build manufacturing know-how that transfers across future formats and chemistries.

With any cell that you commercialize, there is a learning value in both the chemistry as well as the mechanical. 2170 is a highly flexible and standard form factor and will continue to see wide adoption. We are planning further variants in the future, ranging from higher power applications to complete shifts in chemistry, as well as furthering this know-how to **expand into a range of larger-sized cylindrical cells**.

For the initial production run, you've earlier said Amara Raja will likely rely on the supply chain of technology partners, including their approved vendors. How has this position evolved over the last couple of years?

Since we are working on commercializing in-house cell designs as opposed to a partner design, there is **no pre-qualified supply chain** for us to leverage. We have been actively engaging the global supplier network and qualifying materials as per our design. Until now, we have used imported materials for our work in the development facilities and will initially do so for the launch of the gigafactory; and we are keen to begin with suppliers with proven scale and performance.



Equipment at CQP

However, I am excited about the types of announcements and investments being made in domestic battery material supply chains. It is our goal to maximize the amount of value that can be captured within India, which will happen progressively.

Amara Raja has been investing in material testing infrastructure to help qualify future domestic suppliers. Can you share which or what kind of Indian material suppliers are currently in that pipeline or already qualified?

A critical part of our development infrastructure is advanced material characterisation labs, where we have already begun testing local materials and collaborating with suppliers to help meet required specs.

From this month, we will also start trial production at the CQP using select domestic materials. Our next few months of production feature the use of local anode, cathode, and electrolyte.

I am quite optimistic about the types of efforts coming up in India, but there is a time factor that involves thorough testing and validation of material in finished cells, as well as the time it takes for suppliers to ramp up capacities to the required volumes. Some are at advanced stages, even further ahead than us, while others are yet to begin their industrialisation. The shift to local materials will happen gradually but intentionally.

What kind of customers are engaging with the CQP for cell qualification right now?

The main customer category we are currently engaged with is **two-wheeler OEMs**, given the product roadmap we chose.

We are **also introducing samples of LFP prismatic cells** this year for both stationary and automotive applications. We are largely focused on internal development of a range of standardised cell platforms that enable us to address a wide range of applications. Segments such as **Light Electric Mobility** and **Stationary** are more amenable to such an approach. Passenger Cars, on the other hand, are much more varied and involve longer development and validation timelines. The **stationary cells will largely be consumed within our own products**, while engagement with automotive OEMs in the passenger segment is at very initial stages.

Can storage be a good entry point for Indian cell manufacturers? Amara Raja is set to commission its BESS facility this year. Are you considering creating captive demand through the BESS business?

Absolutely. **Stationary energy storage is one of the most attractive entry points for an emerging cell manufacturer.** Unlike many automotive applications, ESS tends to favour greater standardisation in cell formats and longer product lifecycles. That allows manufacturers to focus on improving manufacturing efficiency, yield and cost while serving a broad customer base with a relatively limited number of cell platforms.

That is one of the reasons we are investing across the value chain of cells, packs, and complete ESS solutions. Our **10 GWh ESS facility** gives us an excellent platform to understand system-level requirements and, over time, to integrate our own cells as they are successfully commercialised and qualified. While this provides a benefit of captive demand, it is also our opportunity to accelerate learning, validate products in real-world applications, and continuously improve both our cells and systems.



The Customer Qualification Plant (CQP)

Our development **roadmap includes large-format LFP cells for stationary storage**, and both ePositive and the CQP have been designed to support those programmes. While the initial BESS deployments will use externally sourced cells, our objective is to transition to in-house cells once successfully commercialised.

Cell Manufacturing is a hard business. What would determine long-term success?

Deciding to build a cell manufacturing capability is the beginning of a long journey. It requires patience, sustained investment, and the willingness to learn through every stage of industrialisation. While we reflect upon the successes and failures of others, there are no shortcuts to developing our own deep manufacturing capability. Technology can be transferred; capability cannot.

Every successive cell programme teaches us far more than how to design and manufacture a single product. We are learning how design decisions fundamentally influence manufacturability and cost, how different materials behave in production, how processes interact, which variables drive yield, how quality systems need to evolve, and ultimately how a factory learns.

This accumulated know-how – more than patents and individual IPs – is what ultimately creates a durable competitive advantage. Even if someone were to hand us an exhaustive manual, true understanding only comes from working through each challenge ourselves. **The real test is how effectively we convert individually accumulated knowledge and experiences into institutional memory, embedded in robust systems and processes.** This, more than any single product or technology, will determine our long-term success.



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Summary of Investment Commitments | Jul 2026

Company	Amount Raised	Round/Type	Key Investors	Details
Milo Drive	\$2.4 million	Seed round	Co-led by Caret Capital and Antler	Asset-light EV mobility platform for ride-hailing
TOCAL	₹9 crore		Led by XB Group (₹8.5 cr)	EV fleet start-up. Appeared on Startup Singam
Greaves Electric Mobility	₹530 crore	Rights issue	Greaves Cotton Limited & Abdul Latif Jameel Green Mobility Solutions	Capital infusion to strengthen GEML's next phase of growth
Ather Energy	₹1,200 crore	From existing shareholders	Hero MotoCorp, India-Japan Fund, Co-founders	Hero MotoCorp invested ₹960 crores - raises stake to 30.68%.
Ather Energy	₹1,300 crore (part of ₹ 2500 cr capital infusion)	Qualified Institutions Placement	FIIs & DIIs	ADIA, White Oak and William Blair, HDFC Mutual Fund, Axis Mutual Fund, Edelweiss Mutual Fund
Exide Energy Solutions	₹100 crore for cell and pack facility in Bangalore	Capital infusion in subsidiary	Exide Industries	Cumulative investment now ₹4,902.23 cror
Mahindra Last Mile Mobility	₹322 crore		Led by Lightrock, along with IFC, India-Japan Fund/NIIF)	₹10,822 cr valuation
Spark Minda Green Mobility Systems	₹25 crore	Investment in susidiary	Minda Corporation	EV components subsidiary
RoadGrid	₹13 crore	Grant by Gol	Technology Development Board	To support establishment of Universal EV Charger manufacturing facility
Matel Motion & Energy Solutions	₹130 crore	Series B	Led by UC Impower, Catamaran, Transition VC	Pune-based EV powertrain solutions company
BatterySmart	Follow-on investment		responsAbility Investments AG	USD 50M committed in ~18 months

BYD eMAX 7 | Long-Term Review



Based on 16,000 km driven over 6 months

BYD eMAX 7



LONG TERM REVIEW

The eMAX 7 evokes mixed feelings in India — admiration, resistance to China origin, and curiosity, all at once. Despite import duties inflating the price, **BYD prices the top variant at ₹29.90 lakh ex-showroom, delivering dependability**, real-world range close to claimed figures, and freedom from the random technical glitches that plague many electric cars on Indian roads.



₹29.90 lakh



450 km real-world range



150 kW



Looks a little bulky from the rear



but sporty from the front

eMAX 7 has not been promoted much by BYD and has received much less media coverage than other EVs in the market. Most of the awareness is spreading through word of mouth from owners, but that number isn't very large either. Hence, the inspiration for this review.

The vehicle is priced aggressively, so much so, that it is also being touted as the Innova killer. A 7 seater MPV with a real world range of 450 kilometers with a running cost of around 1.2 rupees per kilometer, I would say that it definitely can be called an Innova Crysta slayer, but not an Innova Hycross killer. Toyota has morphed the Innova into something else with the Hycross, and BYD would need to come up with a monster of an EV to compete with it.

Now the eMAX 7 isn't a completely new vehicle. It is an **upgraded version of its predecessor, the e6**. While e6 was mainly a people mover, used mainly in corporate transportation services and EV passenger fleets, the eMAX 7 has been consciously designed as a personal car, with more stylised looks, more features, and significantly upgraded power. The motor used in e6 was a 71 kW one, while in eMAX 7 it has been more than doubled to 150 kW, which provides an output power of more than 200 bhp. This is quite evident when you drive the car and press the pedal hard. At a traffic signal, no one would imagine that such an MPV-looking vehicle can zoom out of sight so quickly. In fact, the burst of power is so intense, you feel underprepared to handle so much energy the first couple of times you experience it.

Design

The vehicle has an unimpressive stance; it seems disproportionately light from the front and bulky from the rear. The side view from the front is quite better. However, compared with its predecessor, e6, it looks much more fashionable.



Full sized panoramic dark glass sunroof

Despite being an MPV, it has a sporty feel to it due to its aerodynamic design accentuated by contour lines running along the body and elements like dragon face front look, attractive black and dark silver alloys, crystal floating LED headlamps and a Tesla-like full-sized panoramic dark glass sunroof.



Interior & Comfort

You walk into the vehicle and the vehicle automatically switches on, the AC starts at the same setting at which it was last left, and similarly the regen mode and the drive mode also resumes from where you'd left it. Similarly when you walk out of the vehicle, even if you forgot to switch it off, its ok. Because when you lock the vehicle using the key, everything in the car switches off automatically.

Inside the car, apart from the textured plastic material used in the dashboard, which looks cheap, everything else looks premium. The gear knob is very stylish and quite easy to use. The slight feedback when shifting the gears or when using any of the one-click window buttons is very premium. The cushioned soft touch armrest and the leather wrapped steering wheel also feel very good to touch. However, the standout is the big screen in the centre of the dashboard, which is glossy but crystal clear. It also rotates at the touch of a button in a cool manner, a feature I think will be rarely used.

One problem that I face with most of the other vehicles is the wireless apple carplay connectivity, but in BYD eMAX 7, it is quite smooth, and once you figure out how to do it, it never irritates you again. The enormity of the screen kicks in when you start the navigation, with a gigantic map on the display. However the most amazing feature of the cockpit is the 360 degree camera. It's not just a camera that gives you views from different angles, you can actually use the touchscreen to rotate the views in a matrix movie style fashion, even when the vehicle is driving. This feature lends a lot of oomph to the vehicle.

The front seats of the vehicle disappoint me slightly. I am a tall person and very finicky about car seat comfort, and the 6 way electrically adjustable driver or the 4 way adjustable passenger seats are just not high enough for me. Also the seat base stays flat, which means you don't get that tucked in sporty feel while driving. However, my friends who are not as tall didn't find this to be a problem, and in fact one of them, who preferred having a straight sitting posture, actually liked eMAX 7's seat position.



I believe taller people might find it not very comfortable for very long drives. By the way, this is the top variant of the vehicle with 7 seats, but there is also a slightly less costly variant with captain seats.



The build quality is surprisingly good, the doors are very heavy and hold in steps which is very useful when getting off the vehicle when it is parked at a ramp. There is ample legroom both in the front and the rear. The vehicle has an almost flat floor, and that ensures that the 3rd person sitting in the middle in the 2nd row is at ease too. There are AC vents till the 3rd row of the vehicle, and cooling is quite effective too, although it is very cumbersome to control the AC temperature, fan speed and flow direction from the touchscreen. I am not a big fan of stuffing all the controls in a touchscreen in the car, but that is becoming a norm nowadays, at least in the top variants of most of the vehicles. The 3rd row is good enough for kids, not for adults.

You get a lot of storage space in the vehicle if you fold the 3rd row of seats. Compared side by side, it looks as much as in an XUV 700, and that is lot, trust me. The windows, especially the rear ones are very wide. The vehicle gets a lot of daylight inside, and more so when you open up the curtain of that fixed glass panoramic sunroof.

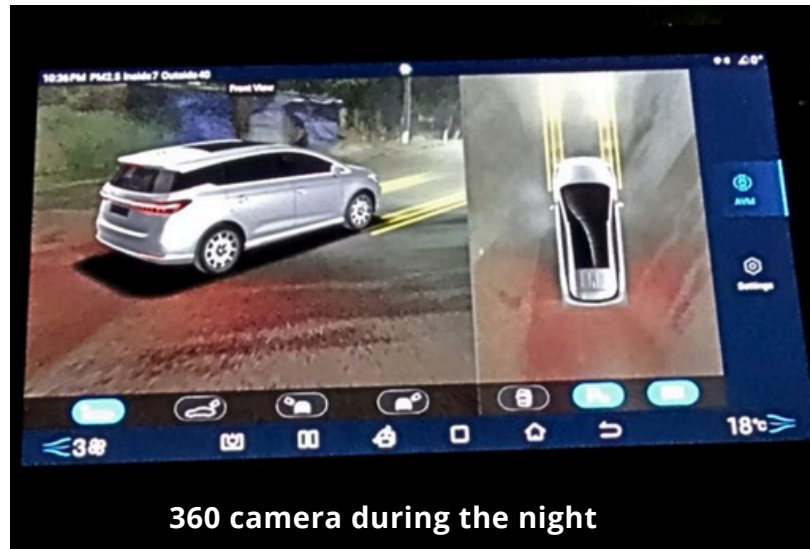


Driving Experience

eMAX 7 is very sturdy, feels quite heavily built yet very sporty, and stays well grounded to the road. Out of the three driving modes, you don't feel the urge to switch up from the eco mode. The low centre of gravity combined with a longer wheel base helps absorb most of the potholes, and the jerks travel to your body carrying a very diminished impact. At 170 mm when unladen, the road clearance is decent enough too, although it doesn't seem so by the looks from outside. I have hardly had any incidence of the vehicle underbody scraping any speed breakers in city drive.

The vehicle responds beautifully to steering manoeuvres; the pickup is literally on demand. But be careful what you ask for, because when you really press the pedal hard, the vehicle becomes slightly uncontrollable unless you are driving in a straight line without any steering movements. There is very little to complain about the driveability of this vehicle. In fact, it surpassed my expectations on almost every front.

The cameras on all sides are crystal clear and very helpful. There is **no lag in the camera**, meaning that there is a reduced possibility of you hitting something first and then realising that the camera was slow to catch up, a problem in several cars.



I did experience an issue with the rear camera though while reversing. **The guidelines are not very dependable.** You trust those guidelines completely and you are bound to bang your vehicle while reverse parking in a tight spot. Apart from this sore point, the combination of parking sensors, high clarity cameras and an adjustable 360 vision is the best in class and is what you get in more premium cars.

There are other good to have features in the eMAX 7, like motorised and remotely openable boot trunk, portable credit like NFC key (apart from the 2 remote keys), wireless charging, ADAS with emergency braking and lane assist, keyless entry, button start, air filtration system, voice commands, wireless phone connectivity, intelligent automatic high beam control and a vehicle to load function that allows you to power your devices from the vehicle battery, like a party speaker or an electric grill to cook your meat and enjoy your trips, though you need to buy a separate adapter for all this.

Battery & Range



With a 71.8 kWh lithium-ion battery, BYD claims a range of 530 kms on a fully charged eMAX 7. However, whenever I switched on the vehicle after a full charge, it always showed a remaining range of 480 kms. Then why does BYD claim 530? That's probably because whenever I drove very gently, I got more juice from the vehicle, than what was shown by the remaining km.

In a normal driving style, after having done more than 20 long drives over a period of several months, I consistently got an estimated range of 450 kilometers, and that includes driving with AC on at a comfortable temperature and also while driving on hilly terrains.

That is very good I believe, for I had much less expectation of its real world range. BYD is known for its battery technology globally. In fact BYD had started off as a battery technology company initially and had later on moved into manufacturing vehicles themselves. BYD still supplies its renowned BLADE batteries to a lot of other automobile companies, including Mahindra for their XEV 9e and BE 6 vehicles. The warranty for the battery pack in eMax 7 is 8 years or 160,000 kilometers, whatever comes first. Now this doesn't necessarily mean that the battery performance will dip significantly after 1.6 lakh kilometers, its just that BYD will not assure you of that. It is expected that the battery should retain at least 70 to 80% of its original range capacity after that, which is not bad.

Charging

BYD provides a free third-party-manufactured 7.2 kW home charger with the vehicle. The vehicle we are reviewing has a charger manufactured by a Chennai-based company called Relux. To charge the vehicle, you just need to plug the charging gun into the vehicle and turn on the charger. The battery's state of charge continuously keeps on displaying on the vehicles screen, but not on the charger, at least not on the one we tested. The charger was compact, had BYD branding, and was simple and handy to use.



Please ensure that you have sufficient electricity load available that you can dedicate to charge the eMAX 7 apart from running all the other appliances at night, like your air conditioners, etc., before you take delivery of the vehicle. Also pre-decide the place where you would want to hang the charger, as apart from the beautiful charger, there would be some thick ugly cables hanging around it. A 7.2 kW charger would need around 10 hours to fully charge the vehicle.

There is also an option to buy a portable 3.2 kW charger which would take double the time to charge the vehicle, but with so many public fast chargers available nowadays, I wouldn't recommend buying one, unless you plan to travel to very remote destinations for road trips. You can also fully fast charge the vehicle on public charging stations in 30 mins to 2 hours, depending upon how powerful the charger is.

Running Cost

At Rs. 7 per unit, charging a 71.9 kWh battery costs around 500 Rupees at home, which translates to a running cost of around 1.2 Rupees per km, considering only electricity costs. After the first free servicing, the recurring service visits happen at an interval of 20,000 kms, and those too don't pinch the pocket, since there is no engine oil or fuel filter to be replaced.

In fact, since there are 2 regenerative braking levels in eMAX 7, and in cities the larger regen mode is suggested, there is an automatic vehicle deceleration that in turn charges the battery whenever you release the accelerator pedal. This significantly reduces the usage of brakes, which means that brake pads would need much lesser replacements. Thus the overall maintenance cost of the vehicle is expected to be very low as compared to an ICE vehicle.

Final Verdict

Do I suggest this vehicle is worthy to be bought? The answer is a resounding yes, not because of its long list of features, not because of its performance, not even because of its price. And that brings us to our last point, again.

“Not once did the vehicle ditch me — in reliability, it has performed bang on.”

Reliability

I have tested eMAX 7 for thousands of kilometers in different road conditions over a period of several months, and not once has the vehicle ditched me. There has never been a single moment where the vehicle didn't charge, the screen hung, some electronic component misfired, or even a single scenario where the vehicle's range fell short of my expectation. In terms of reliability, the vehicle has performed bang on, and for these new age breed of EVs, that is what matters to me the most, and I believe should matter to you as well.



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Have something to say or want to share feedback?

Please write to us at info@evreporter.com

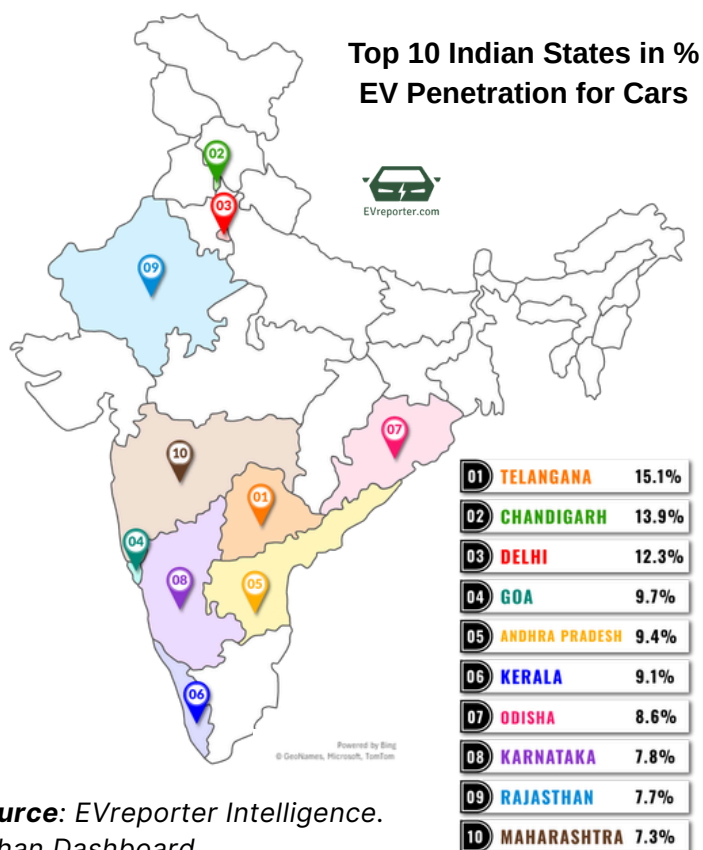


Follow the EVreporter WhatsApp channel to stay updated on India's clean mobility ecosystem.

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Electric Car Sales Trend | Jan 2026 - July 2026



- 31,06,827 cars were registered in India from Jan 2026 to July 2026, of which **1,84,428 were electric cars.**
- Telangana recorded the highest EV penetration at 15.1% (18,005 units), followed by Chandigarh at 13.9% (1,963 units) and Delhi at 12.3% (16,476).
- Tata Motors maintained leadership, selling 72,270 electric cars, accounting for 39.2% of total e-4W sales.
- Mahindra & Mahindra and JSW MG Motor remained the strongest challengers, with 42,838 and 38,199 units, respectively.

The top 3 OEMs contributed over 83% of total e-4W sales. The top 10 states together accounted for 65.8% of the total electric car sales.

OEM-wise Sales Trend for Electric Cars

S No	OEMs	Jan-26	Feb-26	Mar-26	Apr-26	May-26	Jun-26	Jul-26	TOTAL
1	TATA MOTORS	9,211	6,607	9,453	9,607	11,020	12,789	13,583	72,270
2	MAHINDRA & MAHINDRA	4,371	3,536	6,255	6,139	6,683	8,176	7,678	42,838
3	JSW MG MOTOR	5,567	3,939	5,966	5,584	5,321	6,180	5,642	38,199
4	MARUTI SUZUKI	224	232	1,027	1,354	1,676	1,999	1,590	8,102
5	VINFAST AUTO	478	452	778	1,320	1,295	1,448	1,478	7,249
6	BYD	304	394	513	561	763	926	742	4,203
7	HYUNDAI MOTOR	386	379	560	565	478	374	565	3,307
8	KIA INDIA	397	377	540	419	460	539	464	3,196
9	BMW INDIA	384	299	520	348	374	517	367	2,809
10	MERCEDES -BENZ AG	88	90	119	121	218	243	163	1,042
	OTHERS	154	96	263	124	96	143	337	1,213
	TOTAL	21,564	16,401	25,994	26,142	28,384	33,334	32,609	184,428

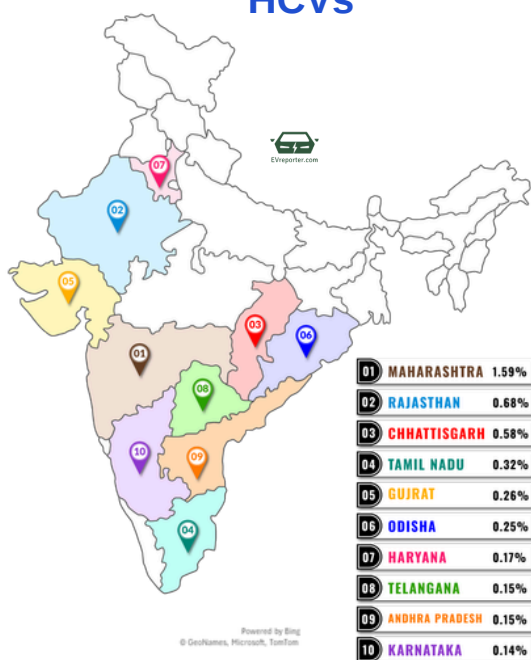
Source: Vahan Dashboard (Data as on 2nd Aug, 2026)

E-Goods Carrier Sales Trend | Jan 2026 - July 2026

The N3 category recorded 821 unit sales in the period Jan 2026-July 2026, while the N1 and N2 categories accounted for 13,973 units.

- In the e-HCV segment, Energy In Motion leads with 206 units, followed by IPL Tech.
- In the e-LCV segment for the same period, Tata Motors leads with 6,282 units, followed by Euler Motors with 3,753 units.

Top 10 Indian States in % EV Penetration for HCVs



- 1,96,103 Heavy Goods Carriers were registered, of which 821 were electric.
- Maharashtra recorded the highest market share and EV penetration of 1.59% with 466 e-N3 units sold, followed by Rajasthan with 0.68% (113 units) and Chhattisgarh with 0.58% (49 units).
- In Maharashtra, EIM led the market with 172 units, followed by SANY with 123 units.
- July 2026 recorded the highest monthly e-HCV sales of the year, with 208 units.

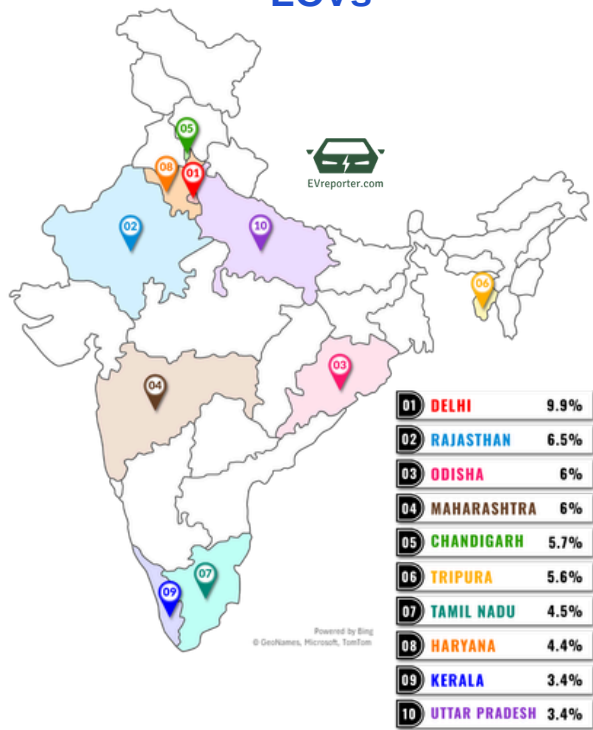
OEM-wise Sales Trend for Electric HCVs

S No	OEMs	Jan-26	Feb-26	Mar-26	Apr-26	May-26	Jun-26	Jul-26	TOTAL
1	ENERGY IN MOTION	53	16	14	34	26	21	42	206
2	IPL TECH ELECTRIC	18	18	23	22	23	32	59	195
3	SANY HEAVY INDUSTRY	42	23	10	19	15	41	43	193
4	BLUE ENERGY COMMERCIAL	3	30	0	0	0	2	13	48
5	TATA MOTORS	11	0	3	0	4	3	25	46
6	QUCEV TECHNOLOGIES	0	10	5	0	15	0	15	45
7	ASHOK LEYLAND	0	10	6	0	0	3	9	28
8	PROPEL INDUSTRIES	5	15	-	0	0	5	2	27
9	OLECTRA GREENTECH	9	2	1	0	1	0	0	13
10	PINNACLE MOBILITY	0	0	0	2	7	1	0	10
	OTHERS	3	1	0	0	0	6	0	10
	TOTAL	144	125	62	77	91	114	208	821

N3 includes Goods Carrier and Articulated Vehicles

E-Goods Carrier Sales Trend | Jan 2026 - July 2026

Top 10 Indian States in % EV Penetration for LCVs



- 3,74,730 Goods carriers were registered in India, of which **13,973 were electric**, for an EV share of only 3.7%.

- Delhi recorded the highest EV penetration of 9.9%** with 1,118 units, followed by Rajasthan with 6.5% (1,678 units) and Odisha with 6% (657 units).

- Tata Motors led the top five states with an overall 45% market share, while Euler Motors secured the second position with 26.9% market share.

- In Delhi, Euler Motors has led the market with 530 units, followed by Tata Motors with 341. While in Rajasthan, Tata Motors led the market with 790 units, followed by Mahindra LMM with 441 units and Euler Motors with 391 units.

- In Rajasthan, **Jaipur** recorded 301 e-LCV sales, followed by **Sikar** with 232 units. In Odisha, **Bhubaneswar** has recorded 201 e-LCV units, followed by **Cuttack** with 96 units.

OEM-wise Sales Trend for Electric LCVs

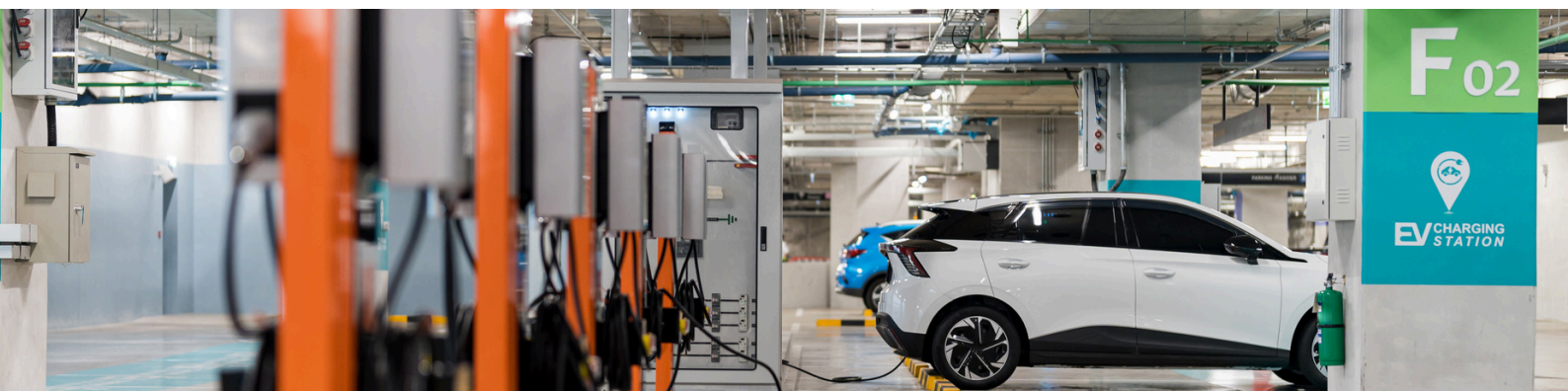
S No	OEMs	Jan-26	Feb-26	Mar-26	Apr-26	May-26	Jun-26	Jul-26	TOTAL
1	TATA MOTORS	671	633	887	815	882	1,118	1,276	6,282
2	EULER MOTORS	347	300	483	551	565	730	777	3,753
3	MAHINDRA LAST MILE MOBILITY	258	237	274	291	270	333	363	2,026
4	SWITCH MOBILITY AUTOMOTIVE	92	79	96	82	160	130	135	774
5	TIVOLT ELECTRIC	57	70	86	82	67	82	129	573
6	VE COMMERCIAL	61	40	38	41	61	54	75	370
7	JUPITER ELECTRIC MOBILITY	34	4	1	2	10	8	0	59
8	KINETIC MOTOR	8	0	0	4	8	31	2	53
9	QUCEV TECHNOLOGIES	3	4	1	8	1	1	7	25
10	PINNACLE MOBILITY	5	2	3	0	2	2	3	17
	OTHERS	2	7	13	6	0	11	2	41
	TOTAL	1,538	1,376	1,882	1,882	2,026	2,500	2,769	13,973

Source: Vahan Dashboard (Data as on 2nd Aug, 2026)

India's Public EV Charging Infrastructure

A snapshot of connector growth, state-level distribution, and CPO leadership

Note by authors Priyans Murarka and Garvit Singh from ExpWithEVs - We collect and publish quarterly reports on charging infrastructure in India. Our data collection methodologies involve **manual data collection from CPO apps**. For this particular edition, we collated data from **84 CPO apps** on public charging infrastructure and presented our findings and insights here. A detailed report can be found at expwithevs.in



Indian cars charge primarily on CCS2 and Type2 infrastructure; thus, we've assumed only those. We are tracking only public charging infrastructure, meaning anyone can charge at these charging stations. This does not include OEM-exclusive or home chargers, or any captive chargers reserved for fleets or other cars.

A single connector connects to a single car. A charger can have one or more connectors. A charging station can have one or more than one chargers.

Growth of Connectors

- Based on our findings, **India has 28,051 CCS2 connectors and 3,908 Type2 connectors**. The CCS2 fast connectors in India grew by 73% year on year.
- India added **11,823 new CCS2 Connectors in the last 12 months**.
- While the CCS2 connectors have grown, the **Type2 charging infrastructure has seen a steady year-on-year decline of ~14.5%**.

The return on investment for CPOs in Type2 charging infrastructure is a lot lower than CCS2. They can sell more units in the same amount of time with similar fixed costs, i.e. rental for parking. The industry is realizing this and can be seen in the data.

Growth of Connectors

Public charging infrastructure across past 12 months

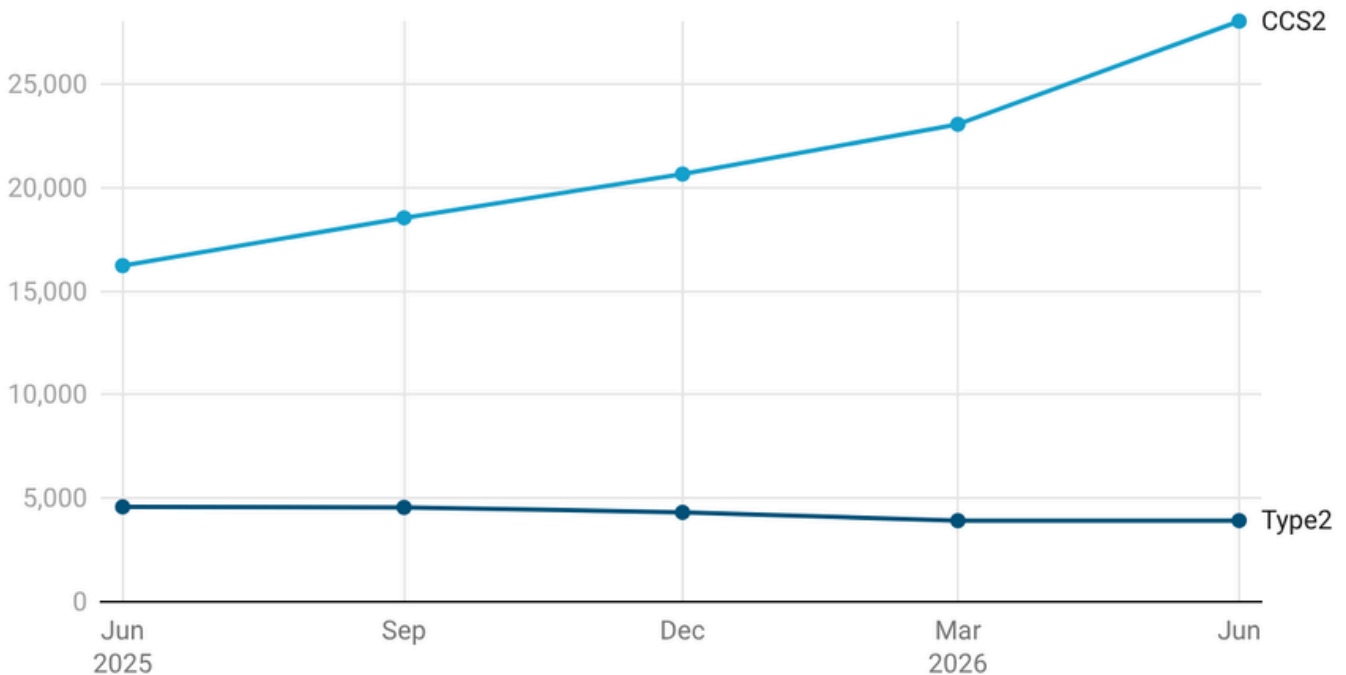


Chart: Priyans and Garvit • Source: ExpWithEVs • Created with Datawrapper

- In Q1FY27, the industry added one CCS2 fast connector every 26 minutes. **If we keep up with this speed, India can cross 50,000 connectors in the next one year.**
- Based on EVreporter's sales data [Jan 2020 to Jun 2026], we know that ~580K electric cars were sold in India. This brings our **car to connector ratio at 18.4**, at par with many developed economies.

Connectors by States

Charging Connectors | Top 10 States

Public charging infrastructure, across the year

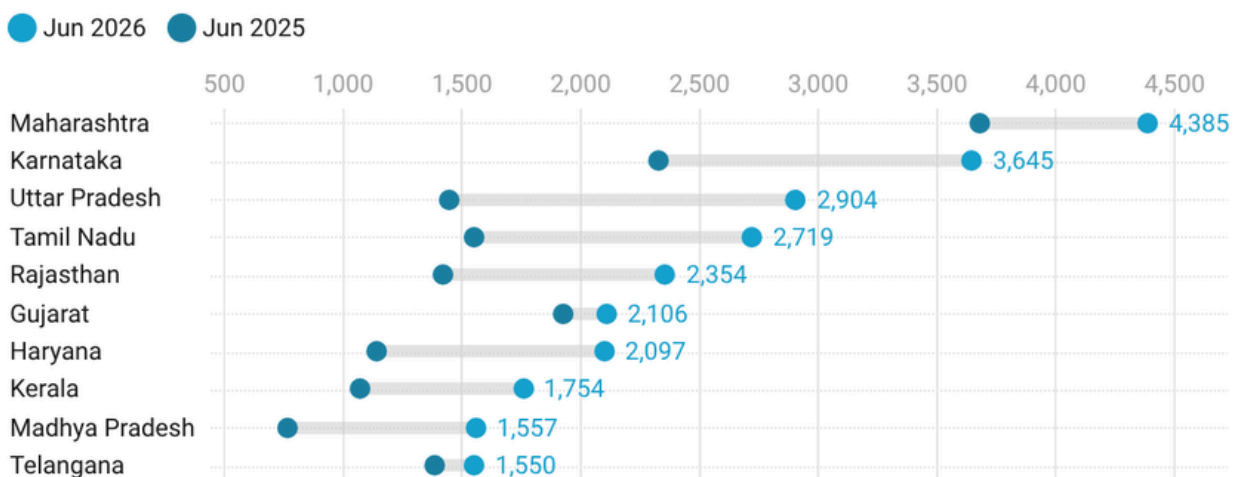


Chart: Priyans and Garvit • Source: ExpWithEVs • Created with Datawrapper

- Over the year, among the top 10 states, Telangana and Gujarat saw the least growth, whereas **Uttar Pradesh saw the highest growth, followed by Karnataka and Tamil Nadu.**
- The Western region is represented by Maharashtra, Rajasthan and Gujarat. All major states in South India make their mark in this list except Andhra Pradesh, while Uttar Pradesh and Haryana are the only two northern region states.
- The growth rates for states like Karnataka, Uttar Pradesh, Tamil Nadu and Rajasthan are much higher than that of the infrastructure leader, Maharashtra.

Who are the key players setting up this charging infrastructure in India?

Connectors by CPOs

Public charging infrastructure, across the year

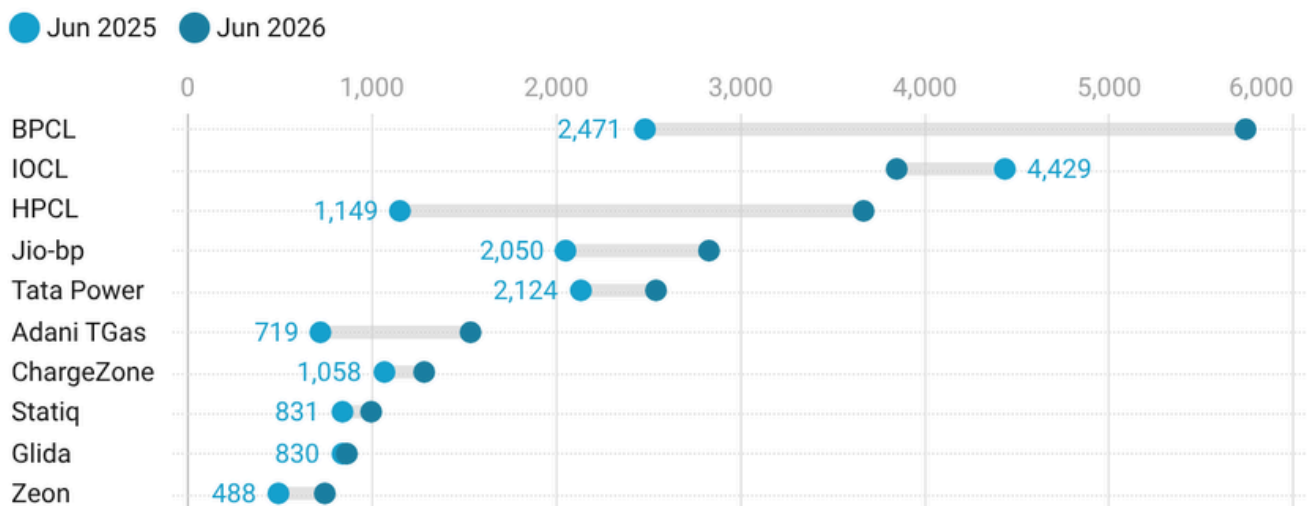


Chart: Priyans and Garvit • Source: ExpWithEVs • Created with Datawrapper

- The **top 3 PSUs have the largest number of connectors** in India.
- Ironically, **IOCL** reduced the total number of connectors from the previous year. While **BPCL** and **HPCL** doubled their network infrastructure.
- Among the private players, **Jio-bp and Adani TGas saw the highest additions** across their network, while Adani TGas registered the highest growth in percentage terms.
- The above chart shows that scaling charging infrastructure without corporate or government backing is slow and gruelling. **Credit to players like ChargeZone, Statiq, Glida and Zeon for sticking out.**

Note: Any OEM partnership chargers or aggregated chargers are not counted as a CPO's chargers.



UNDERSTANDING THE ROLE OF INSULATION MONITORING DEVICES IN DC EV CHARGING

As EV charging systems move to higher voltages and faster charging speeds, ensuring electrical safety is becoming increasingly important. **Ian Wiper, Electronics Engineer at Broyce Control**, discusses the role of Insulation Monitoring Devices (IMDs) in improving the safety, reliability, and uptime of modern DC EV charging infrastructure.

What is an Insulation Monitoring Device?

An Insulation Monitoring Device (IMD) is a safety device that continuously monitors the insulation resistance between an isolated high-voltage DC system and protective earth. In a DC fast charger, the output circuit is intentionally designed as an unearthed (IT) system, with no direct electrical connection between the live DC conductors and protective earth — an arrangement that requires continuous supervision of insulation condition.

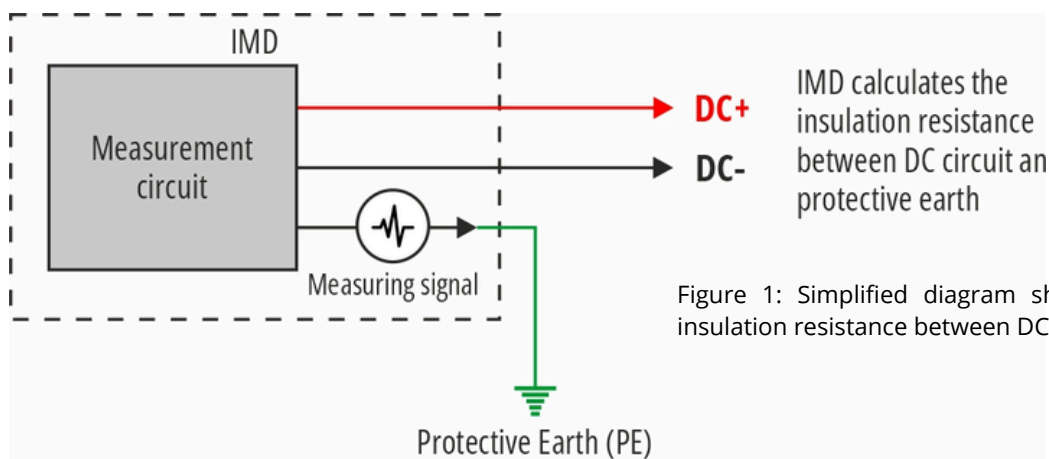


Figure 1: Simplified diagram showing the IMD monitoring insulation resistance between DC+, DC- and protective earth

The IMD injects a very small measuring signal into the isolated DC system and analyses the response to calculate insulation resistance. This current is too small to interfere with normal charger operation. If the measured resistance falls below a predefined threshold, the IMD generates an alarm or trip output, allowing the charger controller to inhibit charging or safely disconnect the high-voltage circuit — providing continuous supervision throughout the charger's operational life.

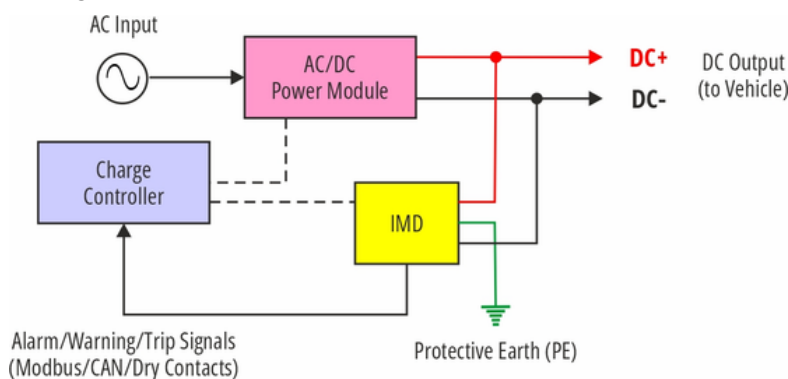


Figure 2: Typical EV charger architecture showing the position of the IMD within the high-voltage DC system

The IMD is typically connected to the isolated high-voltage DC output and interfaces with the charger controller via relay outputs and/or communication protocols such as Modbus RTU or CAN. When an insulation fault is detected, the controller can generate an alarm, inhibit charging, or safely disconnect the high-voltage contactors depending on the manufacturer's protection strategy.

Why is continuous insulation monitoring crucial for DC charging equipment? At what voltage do IMDs see use?

Modern DC fast chargers operate at increasingly higher voltages to reduce charging times and support larger battery capacities — moving from around 500 VDC in early chargers to 800 VDC and 1000 VDC today, and now towards 1250 VDC and higher for Megawatt Charging System (MCS).

These chargers operate in demanding environments — moisture, condensation, dust, vibration, thermal cycling, and repeated connector cycling — that can gradually degrade insulation even while the charger continues to function normally. Unlike a one-time production insulation test performed during manufacturing, an IMD monitors continuously throughout the charger's service life, enabling preventative maintenance before an unexpected failure. As voltages rise, this becomes increasingly critical to safety, availability, and equipment protection.

What happens when insulation integrity is compromised?

As insulation deteriorates, resistance between the live DC circuit and protective earth gradually decreases, **creating leakage paths to the charger enclosure, cable shielding, connector body, or other earthed conductive parts.** There may be no obvious indication at first, but as degradation continues, the risk of electric shock, arcing, equipment damage, and nuisance shutdowns rises significantly.



Figure 3: Fault progression showing Healthy Insulation → Insulation Degradation → IMD Alarm → Charger Response → Maintenance

Once resistance falls below the configured alarm threshold, the IMD signals the charger controller to take action — generating a warning, preventing a session from starting, or safely disconnecting the high-voltage output if charging is already underway. Early detection helps prevent faults from escalating into unsafe conditions, reducing unplanned downtime.

How do insulation monitoring and earth fault detection serve different functions?

Insulation Monitoring (IMD)	Earth Fault Detection
Measures insulation resistance	Measures leakage current
Predictive	Reactive
Detects deterioration before leakage current exists	Operates after leakage current is present
Used on isolated (IT) systems	Used on earthed systems or to detect earth fault current
Supports preventative maintenance	Provides fault protection

The two are complementary, not interchangeable. **An IMD is predictive** — it measures insulation resistance and detects deterioration before significant leakage current exists, enabling preventative maintenance. Earth fault detection devices, such as residual current monitors (RCMs) or **earth leakage relays (ELRs), are reactive** — they detect current already flowing to earth, meaning a fault path has already been established by the time they operate. Many EV charging applications use both together: the IMD provides continuous insulation health supervision, and earth fault detection provides protection against leakage current.

What are the early warning signs that an IMD catches?

Typical causes of insulation degradation include:

- Moisture ingress into cables or connectors
- Condensation inside enclosures
- Ageing or cracked cable insulation
- Damage during installation or maintenance
- Conductive dust or contamination
- Wear within the charging connector
- Thermal cycling and repeated heating/cooling
- Mechanical vibration
- Coolant ingress in liquid-cooled systems

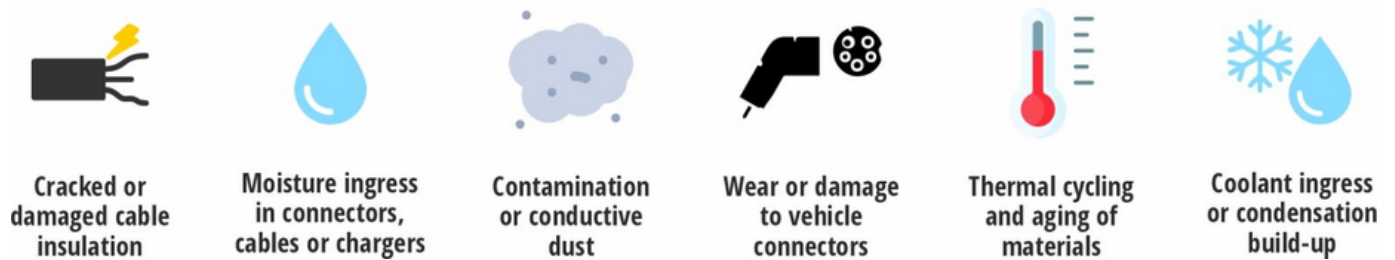


Figure 4: Early warning signs of insulation degradation

Many of these conditions reduce insulation resistance without generating enough leakage current to trigger an earth fault or residual current device — meaning the charger can appear to function normally while insulation quietly deteriorates. Because an IMD monitors continuously, it catches these changes early, allowing maintenance to be planned rather than reacted to.

What does a fault event look like from an IMD's perspective?

A fault event is typically gradual rather than instantaneous. As insulation resistance declines and reaches the configured warning threshold, the IMD can raise an alarm, allowing investigation before the condition becomes critical. If resistance continues falling to the trip threshold, the IMD signals the controller, which — depending on the manufacturer's safety strategy — may prevent a session starting, stop an active session, open the high-voltage contactors, log the fault, or notify a remote monitoring platform.



Figure 5: Fault event sequence

Typical sequence: healthy insulation → gradual degradation → falling resistance detected → warning threshold → trip threshold → controller response → charging inhibited or disconnected → maintenance carried out before the charger returns to service.

What should charger manufacturers assess when selecting an IMD?

Beyond maximum operating voltage, key selection criteria include: compliance with IEC 61557-8 and relevant regional standards; insulation resistance measurement range, accuracy, and repeatability; response time; relay output configuration; communication interfaces; ease of commissioning and configuration; diagnostic capabilities; environmental operating range; physical size and ease of installation; and availability of long-term technical support.

Procurement teams often focus solely on purchase price and voltage rating, overlooking **factors that affect total cost of ownership** — better diagnostics, simpler integration, and strong technical support can meaningfully reduce engineering, commissioning, and maintenance costs. Choosing an IMD that can scale to future higher-voltage, higher-power platforms also helps avoid costly redesigns later.

Broyce Control offers a range of insulation monitoring devices specifically developed for high-voltage DC applications, including EV charging infrastructure. Further information is available [here](#).

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Electric 2W and 3W OEM Updates

LAUNCHES

Avore Electric launched EX series motorcycles (EX1, EX2, EX2s) starting at ₹1,24,999 — ranges from 160–260 km IDC depending on variant.

India Yamaha Motor launches Aerox E at ₹2.81 lakh (Bangalore) — dual removable 1.5 kWh batteries, PMSM motor (9.4 kW, 48 Nm), 117 km range, 95.5 km/h top speed.

VIDA introduced EVOOTER VX2 Plus 4.4 kWh at INR 1,43,990 — 187 km range, 90 km/h top speed | And **VIDA VX2 Go FB at ₹1.13 lakh** (ex-showroom, New Delhi) with a fixed 3.1 kWh battery with direct-plug charging

Komaki launches MG Pro V (₹73,999) and MG Pro+ (₹79,999) — 2.2 kW BLDC hub motor, LiPO4 batteries; range 90-100 km / 150+ km respectively.

Piaggio launches Ape WavE, an L5 electric passenger 3W at ₹2.55 lakh (Pune) — 5.4 kWh battery, 4.3kW motor, 140±5 km range.

Tillid Motors launches EVOC-4F retrofit kit to convert cargo ICE 3Ws into EVs — GARC approved, Karnataka RTO approved, Green Vahan Sewa registered.



Electric 2W and 3W OEM Updates

INVESTMENTS

Mahindra Last Mile Mobility becomes a unicorn — INR 10,822 crore valuation, new INR 322 crore round led by Lightrock (with IFC, India-Japan Fund/NIIF).

Ather Energy raised INR 1,200 crore from existing shareholders through the preferential issue of equity shares and warrants. **Hero MotoCorp** will receive 76,19,047 warrants valued at about **INR 960 crore**; the India-Japan Fund will invest INR 200 crore; and co-founders Tarun Mehta and Swapnil Jain will each invest INR 20 crore. Hero MotoCorp's stake in Ather would rise from 29.48% to 30.68%, India-Japan Fund's stake would rise from 5.75% to 6.02%, and Tarun's and Swapnil's stakes would each move from 4.93% to 4.85%.

Ather has also raised approximately INR **1,300 crore through Qualified Institutions Placement**.

Greaves Electric Mobility secures additional equity infusion of **INR 530 crores** through a Rights Issue, backed by existing shareholders, including Greaves Cotton Limited and Abdul Latif Jameel Green Mobility Solutions.

E3 Electric.Ai raises ₹100 crore (equity + debt), Series A led by BluVenture Holding, ahead of its E3 TRION scooter launch.

Omega Seiki Mobility raised ₹50 crore, co-led by Securocrop Securities India and others, for manufacturing capacity, R&D, and dealer network expansion.

VIDA and Lectrix EV scooters enter **Nepal**.

River rolled out its **50,000th Indie Scooter**; 75+ retail stores, manufacturing at Hoskote, Karnataka. Indie priced at INR 1,55,199 (ex-showroom).

Zelio E-Mobility opened a new manufacturing facility in **Coimbatore** to strengthen its presence in South India.

Ampere (Greaves Electric Mobility) partners with **Muthoot Fincorp** for retail financing across its e-2W range.

BikeWo Green Tech partners with Yubhas Renewables to pilot **solar-assisted** electric three-wheelers for rural/semi-urban mobility.

Manba Finance launches **battery-replacement financing** for new lithium-ion batteries (with charger kits) for e-3Ws (e-rickshaws, e-carts).



E-Bus & Public Transport Updates

Switch Mobility secured a **650 electric bus order** from Sai Green Projects, supporting deployments by BEST (Mumbai) and PMPML (Pune).

Olectra handed over its 4,000th e-bus to Himachal Road Transport Corporation during a flag-off of **297 new 9m buses**.

EKA Mobility flagged off 15 e-buses (12m) in **Zanzibar**; 35 buses ordered for the island, fleet expected to reach 150 by year-end, commercial ops from Aug, 2026.

EKA Mobility and **Switch Mobility** unveiled 9M Electric Buses, while **JBM Electric Vehicles** launched GALAXY electric luxury coach at PRAWAAS 5.0

JSW Greentech has begun deploying **100 electric staff buses** planned for JSW Steel's Dolvi plant. The 12-metre buses will be operated by JSW Eco Mobility for employee transportation.

Keto Motors unveiled its **9m electric bus** Urbanova KE9 (Range - 150 km and a top speed of up to 80 km/h). Technology partnership with Tron Energy, Taiwan

Blackbuck EV and **Chalo** to deploy up to 300 electric buses across urban and intercity routes in India in 9m, 13.5m, and 15m configurations over the next 3 years. The 9m and 15m buses are under homologation, with production expected to begin in Q2 2027.

Drivn and **JBM Electric Vehicles** signed an MoU to deploy 500 electric buses across India, initially focused on luxury intercity coaches.

Drivn partnered with **Prasanna Purple** to deploy 100 intercity e-buses on Mumbai-Pune, Bangalore-Chennai, and Hyderabad-Vijaywada corridors, starting Aug 2026.

Uttar Pradesh to procure **250 new AC electric buses** at a project cost of ₹425.50 crore (₹400 cr from state govt + ₹25.50 cr from UPSTRC).

Vertelo partnered with **redBus** to electrify intercity passenger buses — targeting 500 electric buses over the next few years.



Heavy Commercial Vehicle Updates

Montra Electric flagged off the first batch of 65 heavy-duty electric trucks (Rhino 5538) from its Manesar facility — the first phase of a 260-unit order.

Wonder Cement ordered 250 **Montra Electric Rhino e-Trucks**, operating across Nimbahera-Dahej and Nimbahera-Tuna Port routes (~1,450 km across Rajasthan, MP, Maharashtra, Gujarat), supported by 13 charging stations with 39 chargers.

Drivn (leasing partner) has partnered with **FLYTTA GREEN** and IPLTech to introduce 15 Montra Electric Rhino trucks for **Dalmia Cement**.

Transvolt Mobility receives financing facility from **Tata Capital** to fund deployment of 100+ electric trucks across India (ports, mines, surface transport).

Liugong India delivered 10 **Electric Dump Trucks** (LET600) for mining operations and inaugurated an expanded facility in Pithampur, MP.

BillionE Mobility has partnered with **JK Cement** to deploy 150+ electric trucks for cement logistics. Pilot includes 20 55-ton e-HCVs from the Muddapur plant.

Euler Motors has partnered with **Green Drive Mobility** to deploy 500 electric LCVs (Storm LR, TURBO EV 1000) for mid-/last-mile logistics in FY27 — ~50 vehicles already deployed, targeting ~1,000 by 2028.

SANY Heavy Industry India delivered six **SCP30 lithium battery forklifts** to KIM Industries for the BHEL Jhansi Project.

Components, Manufacturing & Recycling

- Pune-based EV powertrain solutions company **Matel Motion and Energy Solutions** raises **INR 130 crores** in Series B, led by UC Impower, with participation from Catamaran and existing investor Transition VC.
- **Amara Raja Advanced Cell Technologies** signs MoU with **Nuvation Energy** to explore localization/large-scale manufacturing of **1500V BMS platforms** in India — initial focus on grid-scale storage, C&I systems, RE integration.
- **L&T Electronic Products & Systems** booked an order for **5,00,000 electric motors** over 3 years from a leading e-2W OEM. Serial deliveries to begin in September 2026. L&T EPS is the Indian partner of Israel-based EVR Motors.
- **Sona Comstar** partners with **DENSO** to establish two EV-focused JVs in India — one focused on electric/hybrid powertrain systems for 4Ws and large vehicles, and the other on 2Ws and 3Ws.
- **Motherson Group** completed the acquisition of 81% stake in powertrain solution major Yutaka Giken Co., Ltd. (**YGCL**) for USD 184M. **Honda** retains a 19% stake in YGCL. The move deepens Motherson's relationship with Honda and broadens access to the Japanese OEM ecosystem.
- **Nexon Geochem** targets **1,200 MTPA NdFeB permanent magnet facility** in Hyderabad by FY2033, in a technology partnership with Russia's Giredmet.
- **Motivelinks** and **DNM Autopower** (JV with Dongyang Electric & Power India) exchange MoU with the Tamil Nadu govt for an **EV components facility** at Pillaipakkam, Kancheepuram — a ₹300 crore investment.
- **KB Recycling** signs downstream **off-take MoU with BatX Energies** for supply of black mass from its upcoming battery recycling facility — supports EPR compliance via domestic recycling value chain.

Policy & Government

- **Haryana cabinet waives EV registration fee** (2W/3W/4W up to INR 30 lakh) and offers 50% motor tax exemption for EVs priced above INR 30 lakh.
- **Uttar Pradesh cabinet approves 250 new AC electric buses** — with a project cost of ₹425.50 crore.
- India's first indigenous **hydrogen fuel-cell-powered train flagged off by PM Modi** on the Jind-Sonapat section (Northern Railway) — developed by RDSO, 1200 kW propulsion, 75 kmph operating speed, rated for ~2,600 passengers.

Charging, Battery & Swapping

- **responsAbility Investments AG makes a follow-on investment in Battery Smart** — USD 50 million committed across transactions in ~18 months. Battery Smart now runs 1,500 swap stations across 60+ cities.
- **RoadGrid has secured ₹13 crore** from the Technology Development Board (Government of India) to scale manufacturing of its Universal EV Charger. The funding is part of RoadGrid's ₹27.5 crore project with production expected to begin in March 2027.
- **SUN Mobility** showcases modular Multi-Battery **Swap Technology** for heavy commercial vehicles and buses at PRAWAAS 5.0, demonstrated on Tata Motors' 12m Starbus EV.
- **Energy In Motion (EIM) partners with HPCL** to set up swap-and-charge infrastructure for electric HCVs at select HPCL retail outlets.
- **Indofast Energy and Hala Mobility partner** to deploy 40,000 EVs for last-mile deliveries by March 2027 (targeting 1 lakh by March 2028); 15,000 vehicles already deployed across Hyderabad, Bengaluru, Delhi NCR, Mumbai.
- **KSEBL submits second-phase EV Public Charging Station proposal under PM E-DRIVE** — 277 locations, 315 chargers, ₹60 crore subsidy request.

Passenger Vehicle Launch

Kia India launched Syros EV at ₹13.49 lakh (42 kWh) / ₹16.99 lakh (51.4 kWh Extended Range) — its second India-manufactured EV. Range 443–526 km (MIDC), 171 PS motor, 0–100 km/h in 8.1 sec, 100 kW DC fast charging.

Financing Partnerships

EV OEM	Bank / NBFC	Details
Switch Mobility	Bank of India	Retail EV financing
EKA Mobility	Kilpi Technologies (FINAYO)	Financing support for EKA 3S/6S commercial vehicles across Delhi/NCR, UP, Bihar, MP
Montra Electric	Bansal Credits Limited	Financing for e-3Ws, e-SCVs, e-M&HCVs, e-Tractors
Ampere	Muthoot Finance	Retail financing for e-2W range

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