ROAD TRANSPORT YEAR BOOK
(2013-14 and 2014-15)

GOVERNMENT OF INDIA
MINISTRY OF ROAD TRANSPORT & HIGHWAYS
TRANSPORT RESEARCH WING
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MINISTRY OF ROAD TRANSPORT & HIGHWAYS

FOREWORD

Road transport is the dominant transport mode of India both in terms of share in goods and passenger traffic and in terms of contribution to national economy. Road Transport is a quicker, more convenient, more flexible and its reliability have contributed towards the steady increase in its share in the movement of both freight and passengers.

Sustained economic growth, increase in disposable income and better road infrastructure have led to rising demand for road transport and personalized modes of transport (cars and two wheelers in particular). The trend growth rate of the total registered motor vehicles in India during the last ten years 2005-2015 is 9.8%. The total number of registered motor vehicles has reached a figure of 210.0 million as on 31st March, 2015. Personalized mode of transport (cars and two wheelers) have a share of about 87 percent of total vehicle population as on 31st March, 2015.

The present issue of óRoad Transport Year Book contains data/information for two years 2013-2014 and 2014-15. It has the coverage of wide range of information pertaining to registration of motor vehicles, motor vehicle taxation, motor vehicle production and sales, permits and licenses, revenue realization from motor vehicle taxes across States/Union Territories and million-plus cities in India.

I believe that this document would be useful for policy makers, scholars and society at large. Further, the cooperation extended by the source agencies spread across various States and Union Territories is highly appreciated and acknowledged.

(Sanjay Mitra)

October, 2016

KIRTI SAXENA

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PREFACE

Road transport is the primary mode of transport which plays an important role in the movement of goods and passengers. This segment of transportation system is very significant for economic development and social integration of the country.

Transport Research Wing (TRW) of the Ministry of Road Transport & Highways brings out every year a publication on Road Transport, Year Book. The present issue of Road Transport Year Book contains information for two years 2013-14 and 2014-15. It has the coverage of information on the registered motor vehicle population, motor vehicle taxation structure, licenses and permits and revenue realized from road transport in various States/UTs and in million-plus cities of the country as on 31st March, 2014 and 31st March, 2015.

I am especially thankful to the concerned authorities of all States/UTs for furnishing the requisite data/ information to TRW. I also congratulate officers and staff of the TRW for putting considerable efforts in bringing out this useful publication for the year 2013-14 and 2014-15. I hope, this document will be a good reference book for academicians, planners, automobile manufactures and other devout readers.

Constructive suggestions from the users of this publication are always welcome.

(KIRTI SAXENA)

November, 2016

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Road Transport Year Book

Executive Summary

Road transport is the dominant mode of transport in India, both in terms of traffic share and in terms of contribution to the national economy. Apart from facilitating the movement of goods and passengers, road transport plays a key role in promoting equitable socio-economic development across regions of the country. It also plays vital role in social and economic integration and development of the country. Easy accessibility, flexibility of operations, door-to-door service and reliability have earned road transport a greater significance in both passenger and freight traffic vis-à-vis other modes of transport.

2. Sustained economic development and expanding road network have led to rapidly increasing motorized vehicles in India. The total number of registered motor vehicles has increased from about 0.3 million in 1951 to 210.0 million in 2015. The total registered motor vehicles in the country grew at a Compound Annual Growth Rate of 9.8 percent between 2005 and 2015. While the number of different types of motor vehicles were growing over the years there has, however, been significant variations in the growth rates and hence substantial change in the composition of registered vehicles during the period. Two-wheelers which constituted 8.8 percent in 1951 has come to dominate the scene on account of relatively faster growth and by 2015 they accounted for 73.5% of the total registered vehicles. The combined share of vehicles in the categories of cars, jeeps & taxis; goods vehicles; and buses in the total registered vehicles had declined from the 89.9 percent in 1951 to 19 percent in 2015. The share of motor vehicles categorized as ñOthersò which include tractors, trailers and three-wheelers has increased from 1.3 percent 1951 to 7.5 percent in 2015.

3. The long-run trend in vehicular composition has revealed the preference of road users for personalized means of transport over the public road transport.

4. Wide inter-State/UT variations in the growth rates of registered motor vehicles were also observed. The annual growth rate of registered motor vehicles for the decade 2005 to 2015 was highest in Tripura (14.5%), followed by Himachal Pradesh (13.6%) and Bihar (13.5%). The lowest annual growth rates for the same period were recorded by Chandigarh (0.9%), Jharkhand (4.3%) and

Nagaland (6.8%). Amongst the million plus cities Kochi (13.8%) recorded the highest annual growth rate which was followed by Surat (13.5%) and Kanpur (13.1%).

5. Out of the total 210.03 million registered motor vehicles up to 31st March, 2015 in India, the State of Maharashtra accounted for the largest share (12.2%) followed by Tamil Nadu (10.7%), Uttar Pradesh (10.3%), Gujarat (8.9%) and Karnataka (7.0%). These five States together accounted for 49.1 percent of the total vehicles registered upto 31st March, 2015. Small States/UTs, (both in terms of geographical area and population) namely, Sikkim and Lakshadweep have lowest share in the number of registered motor vehicles.

6. Information on the number of registered vehicles has been presented separately for 48 reporting million-plus cities. These 48 reporting million-plus cities have reported 662.44 lakh registered motor vehicles during the period up to 31st March, 2015. Out of these, Delhi (88.51 lakhs) had the highest number of registered motor vehicles, followed by Bengaluru (55.60 lakh), Chennai (49.34 lakh), Ahmedabad (34.20 lakh), Greater Mumbai (25.71 lakh) and Surat (24.59 lakh). These six cities accounted for 41.96 percent of the total registered vehicles among the reporting million-plus cities.

7. International comparison of vehicular penetration reveals that developed countries tend to have higher car penetration whereas in developing countries tend to have higher two-wheelers penetration.

8. Both Central and State Governments impose taxes on vehicles and related items such as petrol, diesel, tyres and tubes and accessories. In addition, the Central Government levies taxes on certain road transport services whereas the State Governments levies tax on passengers and goods and toll tax. The existing structure of taxes characterized by the problem of multiplicity and wide inter-State variations is expected to be alleviated by the Goods and Service Tax (GST) which is set to soon come into operation. This would imply that taxes on motor vehicle and passengers & goods which are significant revenue sources for the States, accounting for over 10 percent of own tax revenue for several States and about 7.5 percent of all the States together would come to be subsumed into the GST.

Section - I

Importance of Road Transport Sector in Indian Economy

1.1 The major modes of transport in India are roads, railways, airways, shipping and inland waterways. The sector is dominated by road transport, both in terms of share in passenger and freight carried and in terms of contribution to the national economy. Between the two main modes of transport, viz., road and railways, road transport carries about 90 percent of the total passenger traffic and 67 percent freight traffic. In terms of contribution to the economy, road transport contributes about 3.3 percent of Gross Value Addition (GVA)* against the total transport sector contribution of 5 percent in the GVA. Apart from facilitating the movement of goods and passengers, road transport also plays a key role in promoting equitable socio-economic development across regions of the country. Road transport facilitates universal access to public services and promotes development of backward regions by opening them to trade and investment. Easy accessibility, flexibility of operations, door-to-door service and reliability have earned road transport a greater significance in both passenger and freight traffic vis-à-vis other modes of transport.

1.2 Sustained economic growth has brought about expansion of the transport sector in India. The share of transport sector in Gross Value Added (GVA) increased from 4.9 percent in 2011-12 to 5.0 percent in 2014-15. The contribution of road transport sector in GVA has remained more or less stable at 3.3 percent during the same period. The share of road transport in the transport sector value addition has also remained stable at about 66 percent. Table 1.1 below gives the share of various sub-sectors of the transport sector in GVA since 2011-12.

Table 1.1: Percentage Share of Different Modes of Transport in Gross Value Added (GVA) at base year (2011-12)

Sector/Year	2011-12	2012-13	2013-14	2014-15
Transport Sector	4.92	5.02	5.01	4.99
of which:				
Railways	0.75	0.81	0.80	0.81
Road Transport	3.24	3.30	3.30	3.28
Water Transport	0.09	0.08	0.08	0.08
Air Transport	0.05	0.05	0.05	0.05
Services Incidental to Transport	0.78	0.78	0.77	0.77

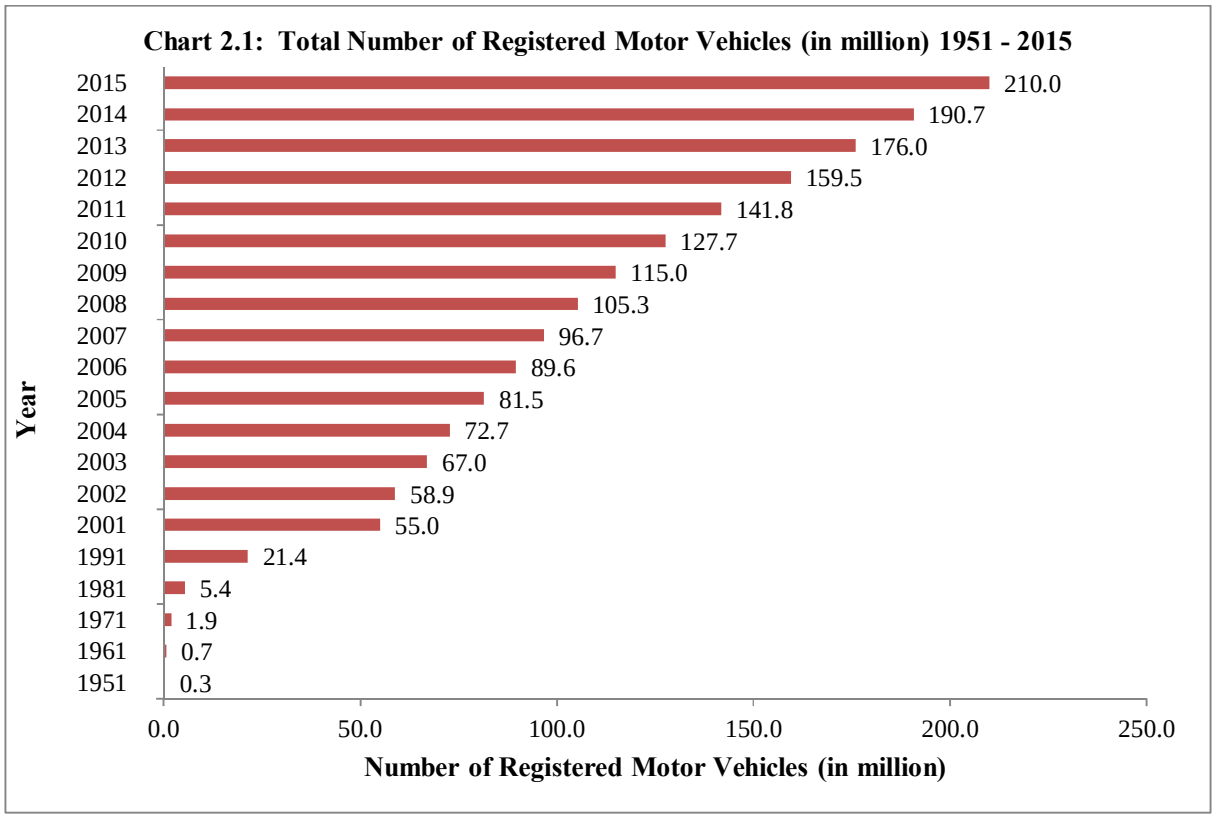
Source: Central Statistical Organisation

*: The National Account Statistics focuses on GVA instead of GDP as GVA gives a picture of economic activity from producerôs perspective.

Section – 2

Registered Motor Vehicles in India

2.1 There has been a continuous increase in the number of registered motor vehicles in India since 1951. The total number of registered motor vehicles increased from about 0.3 million in March, 1951 to 190.7 million up to the period 31st March, 2014 and 210.0 million up to 31st March, 2015. The total registered vehicles in the country grew at a Compound Annual Growth Rate (CAGR) of 10.1% between 2004 and 2014 and 9.8% between 2005 and 2015.**Annexure 2.1** indicates the total number of all registered motor vehicles in India since 1951 to 2015.



Source: Offices of State Transport Commissioners/UT Administrations.

2.2 Composition of Registered Motor Vehicles: The share of two wheelers in total registered motor vehicles in India stood at 73.1% during 2014 and 73.5% during 2015 as compared to 8.8% during 1951 (Table 2.1). Concomitantly, the share of cars, jeeps and taxis in the total number of registered vehicles was 13.6% in both period up to 31st March, 2014 and 2015, marking a steep decline from 52% during the period 31st March, 1951. The share of buses in total registered vehicles

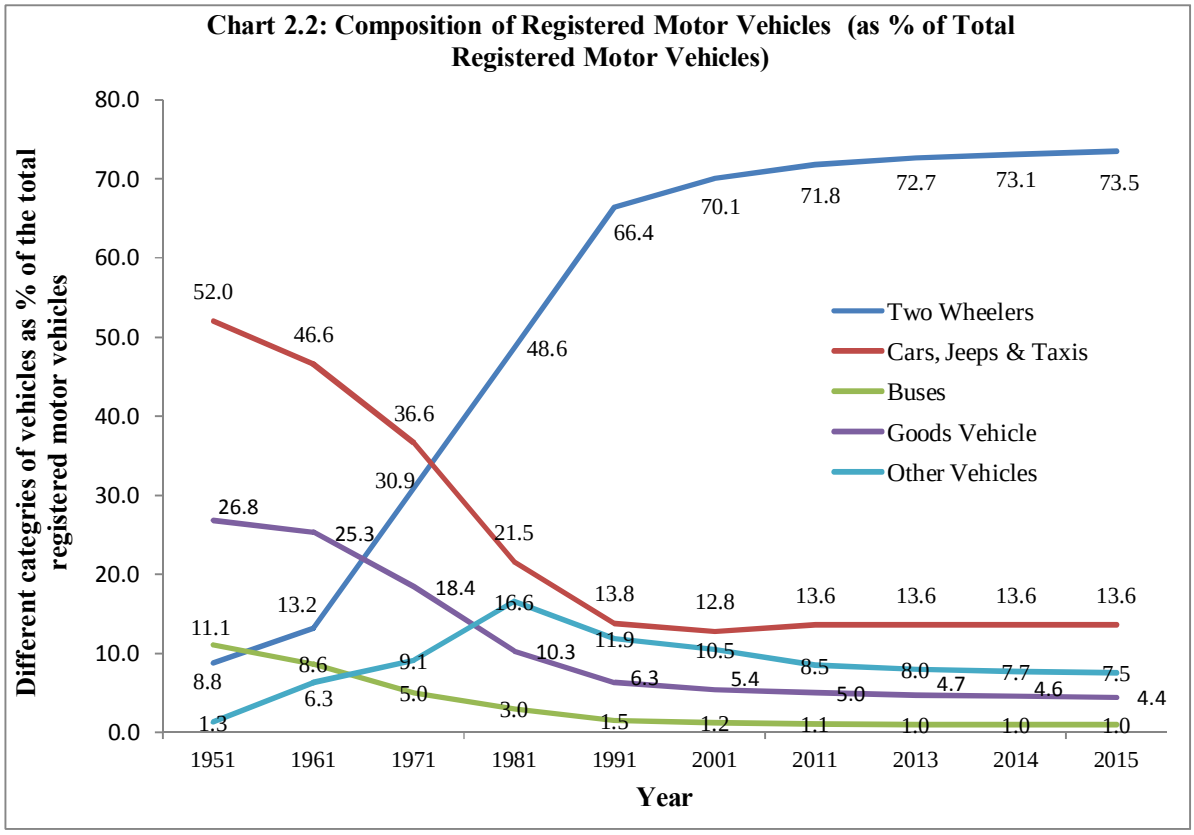
declined from 11.1% during the period 31st March 1951 to 1.0 % for the both period up to 31st March 2014 and 2015. Omni buses were also included in the fleet of buses from 2001. The number of registered goods vehicles, which had accounted for 26.8% during the period 31st March, 1951 decreased to 4.6% of the total vehicles in the country during the period up to 31st March, 2014 and 4.4% up to 31st March, 2015. The share of ôOther vehiclesõ, which include tractors, trailers, three wheelers (passenger)/Light Motor Vehicles (LMVs) and other miscellaneous vehicles, increased from 1.3% in 1951 to 7.7% during 2013-14 and 7.5% during 2014-15.

Table 2.1: India - Composition of Vehicle Population (% of total)

As on 31st March	Two Wheelers	Cars, Jeeps & Taxis	Buses @	Goods Vehicle	Other Vehicles	Total
	(as % age of total vehicle population)					(Million)
1951	8.8	52.0	11.1	26.8	1.3	0.3
1961	13.2	46.6	8.6	25.3	6.3	0.7
1971	30.9	36.6	5.0	18.4	9.1	1.9
1981	48.6	21.5	3.0	10.3	16.6	5.4
1991	66.4	13.8	1.5	6.3	11.9	21.4
2001	70.1	12.8	1.2	5.4	10.5	55.0
2002	70.6	12.9	1.1	5.0	10.4	58.9
2003	70.9	12.8	1.1	5.2	10	67.0
2004	71.4	13.0	1.1	5.2	9.4	72.7
2005	72.1	12.7	1.1	4.9	9.1	81.5
2006	72.2	12.9	1.1	4.9	8.8	89.6
2007	71.5	13.1	1.4	5.3	8.7	96.7
2008	71.5	13.2	1.4	5.3	8.6	105.3
2009	71.7	13.3	1.3	5.3	8.4	115.0
2010	71.7	13.5	1.2	5.0	8.6	127.7
2011	71.8	13.6	1.1	5.0	8.5	141.8
2012	72.4	13.5	1.0	4.8	8.3	159.5
2013	72.7	13.6	1.0	4.7	8.0	176.0
2014	73.1	13.6	1.0	4.6	7.7	190.7
2015	73.5	13.6	1.0	4.4	7.5	210.0

Source: Offices of State Transport Commissioners/UT Administrations.
Note: ôOther vehiclesõ include tractors, trailers, three wheelers (passenger vehicles)/LMV and other miscellaneous vehicles which are not classified separately.
@ includes Omni buses since 2001

2.3 Graphic representation of the vehicular composition is at Chart 2.2 below shows the linear movement of each category of vehicleôs share in the total registered vehicle over the period from 1951 to 2015.



2.4 Apart from the sheer dominance of the total vehicular population in India by two-wheelers, this category of vehicle has seen steady growth, though at a lower rate in recent years, whereas the share of buses has declined over the years. This preference of road users for personalised means of transport over public transport could be dictated, apart from convenience and economic considerations, by the failure of public transport system in keeping up with the demand.

2.5 Growth of Vehicles vis-a-vis Roads: The CAGR of the total registered motor vehicles in India were 10.1% and 9.8% during the period 2004 to 2014 and 2005 to 2015 respectively (Table 2.2). Amongst the various categories of vehicles, the highest CAGR during the period 2004 to 2014 were recorded by cars, jeeps and taxis (10.6%), followed by two-wheelers (10.4%), buses 9.4% goods vehicles (8.8%) and other vehicles 8.0%. During the period 2005 to 2015, also the highest CAGR were recorded by cars, jeeps and taxis (10.7%), followed by two-wheelers (10.1%), goods vehicles

(8.8%), buses 8.2% and others vehicles 7.8%. Between 2004 to 2014 and 2005 to 2015, the total vehicle population grew at a CAGR of 10.1% & 9.8% respectively vis-à-vis the CAGR of 4% and 3.6% in the total road length.

Table 2.2: Compound Annual Growth Rates (in %) in Vehicles and Road Length

Period	Vehicles						Roads					
	Two - Wheelers	Cars, Jeeps & Taxis	Buses	Goods Vehicles	Others*	Total	NHs	SHs & OPWD	Rural	Urban	Project	Total
1961/1951	12.5	6.9	5.3	7.4	26.5	**8.1**	1.9	4.0	-0.5	NA	NA	**2.7**
1971/1961	20.7	8.2	5.1	7.4	15.0	**10.9**	0.0	2.6	6.0	4.5	NA	**5.7**
1981/1971	16.3	5.4	5.6	4.9	18.1	**11.2**	2.9	4.5	5.9	5.5	3.5	**5.0**
1991/1981	18.4	9.8	7.4	9.4	10.9	**14.8**	0.6	2.1	7.2	4.3	1.2	**4.6**
2001/1991	10.5	9.1	6.7	8.1	8.6	**9.9**	5.5	3.1	4.6	3.0	0.6	**3.8**
2011/2001	10.2	10.5	9.7	9.1	7.6	**9.9**	2.1	3.0	3.4	5.0	2.3	**3.3**
2014/2004	10.4	10.6	9.4	8.8	8.0	**10.1**	3.4	3.9	4.4	4.3	1.3	**4.0**
2015/2005	10.1	10.7	8.2	8.8	7.8	**9.8**	**4.1**	**3.1**	**3.8**	**5.0**	**1.5**	**3.6**

Note: NHs: National Highways; SHs: State Highways; PWD: Other Public Works Department roads
* Others include tractors, trailers, three-wheelers (passenger vehicles/LMVs) and other miscellaneous vehicles which are not classified separately.
Sources: 1. Offices of State Transport Commissioners/UT Administrations
2. ôBasic Road Statistics of India, 2013-14 and 2014-15ô

2.6 Growth of different categories of registered Motor Vehicles from 1951 to 2015 is illustrated in **Annexure 2.1**.

Two wheelers: The total number of registered two wheelers increased at a rate of 9.1% during 2013-14 and 10.7% during 2014-15 to reach the figure of 1394.1 lakh up to 31st March, 2014 and 1542.9 lakh up to 31st March, 2015.

Cars, Jeeps and Taxis: The number of registered cars, jeeps and taxis rose by 8.1% during 2013-14 and 10.1% during the year 2014-15. These were about 260.0 lakh of cars, jeeps & taxis up to 31st March 2014 and 286.1 lakh up to 31st March 2015.

Buses: The number of registered buses, including omni buses, increased by 4.0% during 2013-14 and 4.4% during 2014-15. There were 18.9 lakh buses, including omni buses up to 31st March 2014 and 19.7 lakh up to 31st March 2015.

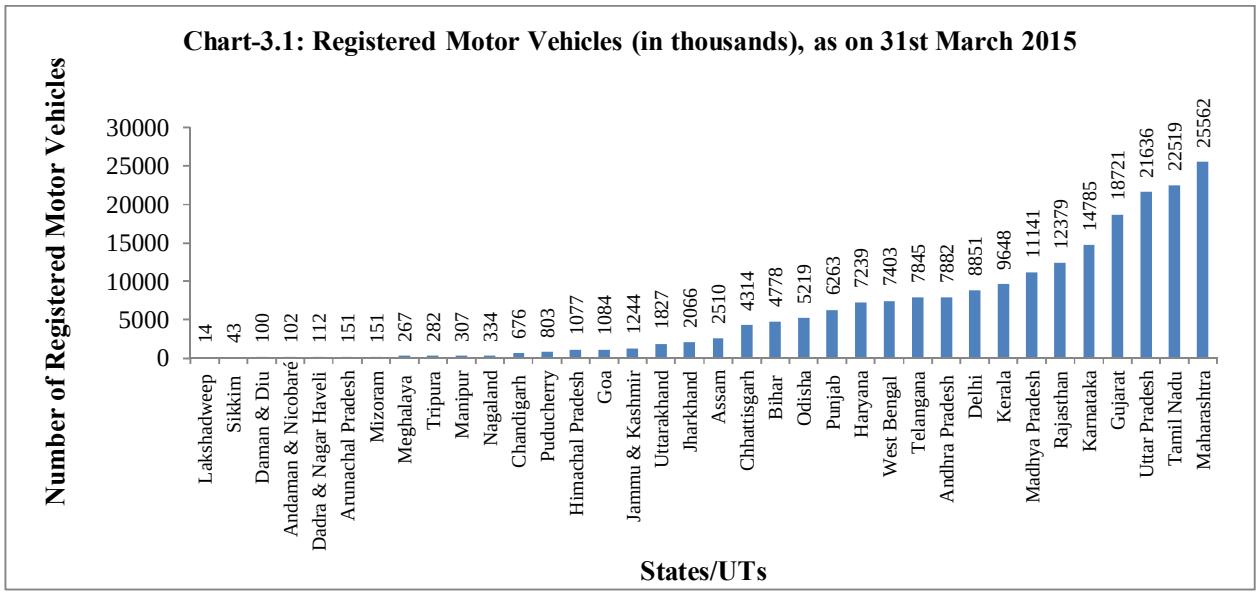
Goods Vehicles: Goods Vehicles includes multi-axled/articulated, trucks & lorries and light motor vehicles (Goods). The number of registered goods vehicles recorded a growth rate of 4.7% during 2013-14 and 7.4 % during 2014-15. There were about 87.0 lakh goods vehicles up to 31st March 2014 and 93.4 lakh up to 31st March 2015.

Other Vehicles: Other vehicles include tractors, trailers, three-wheelers (passenger vehicles/LMVs) and other miscellaneous vehicles which are not classified separately. The combined growth of these vehicles together during 2013-14 was 4.8% and 7.4% during 2014-15. There were 147.1 lakh and 158.0 lakh of other vehicles up to 31st March 2014 and up to 31st March 2015 respectively.

Section – 3

State-wise Distribution of Registered Motor Vehicle Population in India

3.1 Out of total 190.7 million registered motor vehicles up to 31st March, 2014 and 210.02 million up to 31st March, 2015, the State of Maharashtra accounted for the largest share (12.3% up to 31st March, 2014 and 12.2% up to 31st March, 2015) in total registered motor vehicles in the country followed by Tamil Nadu (10.9% up to 31st March, 2014 and 10.7% up to 31st March, 2015), Uttar Pradesh (10.0% up to31st March, 2014 and 10.3% up to 31st March, 2015), Gujarat (9.0% up to 31st March, 2014 and 8.9% up to 31st March, 2015) and Karnataka (7.0% for both period up to 31st March, 2014 and 31st March, 2015). These five States together accounted for 49.2% of the total vehicles registered up to 31st March, 2014 and 49.1% up to 31st March, 2015. The lowest number of motor vehicles (0.13 lakh up to 31st March, 2014 and 0.14 lakh up to 31st March, 2015) were registered in the UT of Lakshadweep with a share of 0.01% in the total registered motor vehicles in the country (details at Annexure 3.1). Among the States, Sikkim reported the lowest number of the total registered vehicles (0.40 lakh up to 31st March, 2014 and 0.43 lakh up to 31st March, 2015) with a share of 0.02 % in the total registered motor vehicles in the country. Chart-3.1 depicts State/UT wise number of registered motor vehicles up to the period 31st March 2015. Annexure 3.2 indicates the state-wise figures of registered motor vehicles from 2004 to 2015.



Note: Data for Arunachal Pradesh and Punjab is of the year 2011-12

3.2 In terms of growth (CAGR) of registered motor vehicles, there was a wide range of variation amongst the States/UTs. While the highest CAGR for registered vehicles during 2004-2014 were recorded by Bihar (18.7%) followed by Manipur (14%) and Meghalaya (13.0%), the lowest CAGRs were recorded by Chandigarh (0.7%), Jharkhand (3.5%) and Nagaland (6.3%). During 2005-2015 the highest CAGR for registered vehicles were recorded by Tripura (14.5%) followed by Himachal Pradesh (13.6%) and Bihar (13.5%), the lowest CAGRs were recorded by Chandigarh (0.9%), Jharkhand (4.3%) and Nagaland (6.8%). The States/UTs wise CAGR during 2004-2014 and 2005-2015 are given in (Table 3.1) below-

Table 3.1: State/UT wise CAGR of Registered Motor Vehicles

State/UT	**2004-2014**	**State/UT**	**2005-2015**
Bihar	18.7	Tripura	14.5
Manipur	14.0	Himachal Pradesh	13.6
Meghalaya	13.0	Bihar	13.5
Himachal Pradesh	12.9	Mizoram	12.5
Tripura	12.9	Uttarakhand	12.3
Karnataka	12.9	Chhattisgarh	12.1
Andaman & Nicobar Islands	12.8	Kerala	11.9
Mizoram	12.6	Assam	11.9
Chhattisgarh	12.3	Odisha	11.8
Uttarakhand	12.3	Uttar Pradesh	11.4
Kerala	12.1	Rajasthan	11.3
Odisha	11.9	Meghalaya	11.2
Assam	11.8	Lakshadweep	11.1
Uttar Pradesh	11.5	Haryana	10.8
Dadra & Nagar Haveli	11.4	Dadra & Nagar Haveli	10.8
Rajasthan	11.2	West Bengal	10.7

State/UT	2004-2014	State/UT	2005-2015
Haryana	11.0	Andaman & Nicobar Islands	10.6
West Bengal	10.2	Karnataka	10.5
Maharashtra	10.1	Manipur	10.4
Lakshadweep	10.0	Madhya Pradesh	10.3
Jammu & Kashmir	9.9	Jammu & Kashmir	10.0
Madhya Pradesh	9.8	Maharashtra	9.9
Tamil Nadu	9.3	Tamil Nadu	9.3
Gujarat	9.2	Gujarat	9.1
Puducherry	9.1	Puducherry	8.7
Sikkim	8.8	Goa	8.4
Goa	8.8	Sikkim	8.3
Daman & Diu	7.1	Delhi	7.8
Delhi	6.9	Daman & Diu	7.1
Nagaland	6.3	Nagaland	6.8
Jharkhand	3.5	Jharkhand	4.3
Chandigarh	0.7	Chandigarh	0.9

Note- The information of registered motor vehicles as on 31st March, 2014 and 2015 is not reported by the state of Arunachal Pradesh and Punjab. As Telengana is a newly created state, from bifurcation of Andhra Pradesh. Therefore the state of Andhra Pradesh, Arunachal Pradesh, Punjab and Telengana is not included for calculation of CAGR.

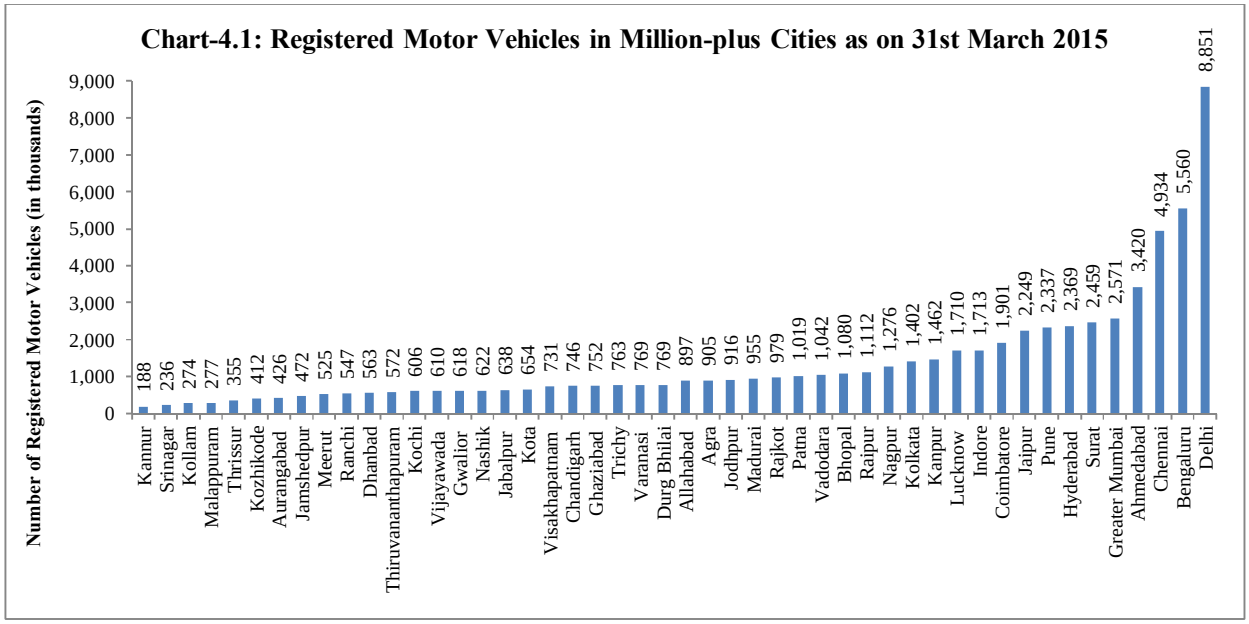
3.3 State-wise major category-wise number of registered vehicles in 2014 and 2015 are shown at Annexure 3.4 and 3.5. State-wise, detailed vehicle category-wise number of vehicles registered during 2013-14 and 2014-15 and cumulative number of registered vehicles as on 31st March 2014 and 31st March 2015 are presented in Annexure 3.6. Similarly, State-wise detailed vehicle category-wise number of vehicles in used in respect of reporting States are given at Annexure 3.7.

Section – 4

City- wise Distribution of Registered Motor Vehicle Population in India

4.1 Amongst the 48 reporting Million-Plus Cities, the total number of registered vehicle upto 31st March 2014 was 601.12 lakh. Delhi (82.93 lakh) recorded the highest number of registered motor vehicles, followed by Bengaluru (50.50 lakh), Chennai (43.54 lakh), Ahmedabad (31.96 lakh), Greater Mumbai (23.33 lakh) and Surat (22.44 lakh). These six cities accounted for 42.7% of the total registered vehicles in respect of the reported Million Plus Cities. Ranchi (0.74 lakh) reported the lowest number of registered motor vehicles amongst reporting Million-Plus Cities in India (details at Annexure 4.1).

4.2 The number of total registered vehicles upto 31st March, 2015 in respect of these Cities was 662.44 lakhs. Of these, Delhi (88.51 lakhs) recorded the highest number of registered motor vehicles, followed by Bengaluru (55.60 lakh), Chennai (49.34 lakh), Ahmedabad (34.20 lakhs), Greater Mumbai (25.71 lakhs) and Surat (24.59 lakh). This is depicted in (Chart 4.1). These six cities accounted for 41.96% of the total registered vehicles of the reported Million Plus Cities during the period 2014-15. Kannur (1.88 lakhs) reported the lowest number of registered motor vehicles amongst reporting Million Plus Cities in India during the period 2014-15. The detailed category-wise distribution of vehicles in Million Plus Cities of India for 31st March of 2014 and 2015 are at Annexure 4.2 and 4.3 respectively.



4.3 Amongst the top six cities in terms of the number of registered motor vehicles, the highest CAGR of 13.3 % was recorded by Kochi followed by Surat (12.5%) and Ahmedabad (11.5%) during 2004-2014. During 2005-2015, the highest CAGR of 13.8 % was recorded by Kochi followed by Surat (13.5%) and Kanpur (13.1%).The select Million-Plus Cities which recorded more than 10% CAGR during 2004-2014 and 2005-2015 is given in (Table 4.1) below-

Table 4.1: CAGR of Registered Motor Vehicles in Select Million Plus Cities

Million Plus Cities	2004 to 2014	Million Plus Cities	2005 to 2015
Kochi	13.3	Kochi	13.8
Surat	12.5	Surat	13.5
Ahmedabad	11.5	Kanpur	13.1
Pune	11.2	Madurai	11.2
Kanpur	11.2	Pune	10.9
Patna	10.9	Coimbatore	10.8
Madurai	10.6	Lucknow	10.8
Bengaluru	10.3	Patna	10.4
Coimbatore	10.1		

Source: Offices of State Transport Commissioners/ UT Administrations.

3.4 City-wise, detailed vehicle category-wise cumulative number of registered vehicles as on 31st March 2014 and 31st March 2015 are presented in Annexure 4.4.

Section – 5

International Comparison on Vehicular Penetration

5.1 Vehicular penetration in India, measured by the number of vehicles per 1000 persons, has seen substantial increase from 1980s. Vehicular penetration in India has increased 8 in 1981 to 167 by 2015. However, as compared to developed countries the total motor vehicle penetration in India is low. Table 5.1 gives international comparison of vehicular penetration which shows that car penetration in developed countries is much higher than in the developing countries. In contrast, the penetration of two wheelers in developing countries is higher than the developed countries. Developed countries like Germany and USA have car penetration rates (car/1000 persons) higher by factors of about 7 and 5 to that of China and by factors of 29 and 19 to that of India respectively. However, in India and few other developing countries the penetration level of two-wheelers (two wheelers/1000 persons) is much higher compared to developed countries. Annexure 5.1 & 5.2 indicates the details of Vehicle Fleet Ratios and Two-wheeler per 1000 persons of Select Developed & Developing Countries.

Table-5.1: Vehicular Penetration during 2013 in Select Developed & Developing Countries

Country	GNI per capita (US $) for 2013	Per 1000 person		
		Passenger Cars	Total Motor Vehicles	Two Wheelers
Developed				
U.S.A	53,470	360	783	27
U.K	41,680	455	517	19
Japan	46,330	466	598	81
Germany	47,270	544	603	50
Australia	65,390	562	711	32
Developing				
Mexico	9,940	203	285	15
Malaysia	10,430	358*	396*	356
South Africa	7,190	110**	162**	6
Brazil	11,690	227	290	108
China	6,560	76	93	70
Korea, Rep	25,920	300	386	42
India (#)	1,570	19	167	123

*:Data relates to 2012. **: Data relates to 2011

#: Data in respect of passenger cars, total motor vehicles and two wheelers relate to 2015. For population data projected for 2015 has been taken from Office of the Registrar General & Census Commissioner, India. Projected total population of India for 2015 is 1254019 thousand.

Sources: 1. World Road Statistics, 2015, International Road Federation, Geneva.

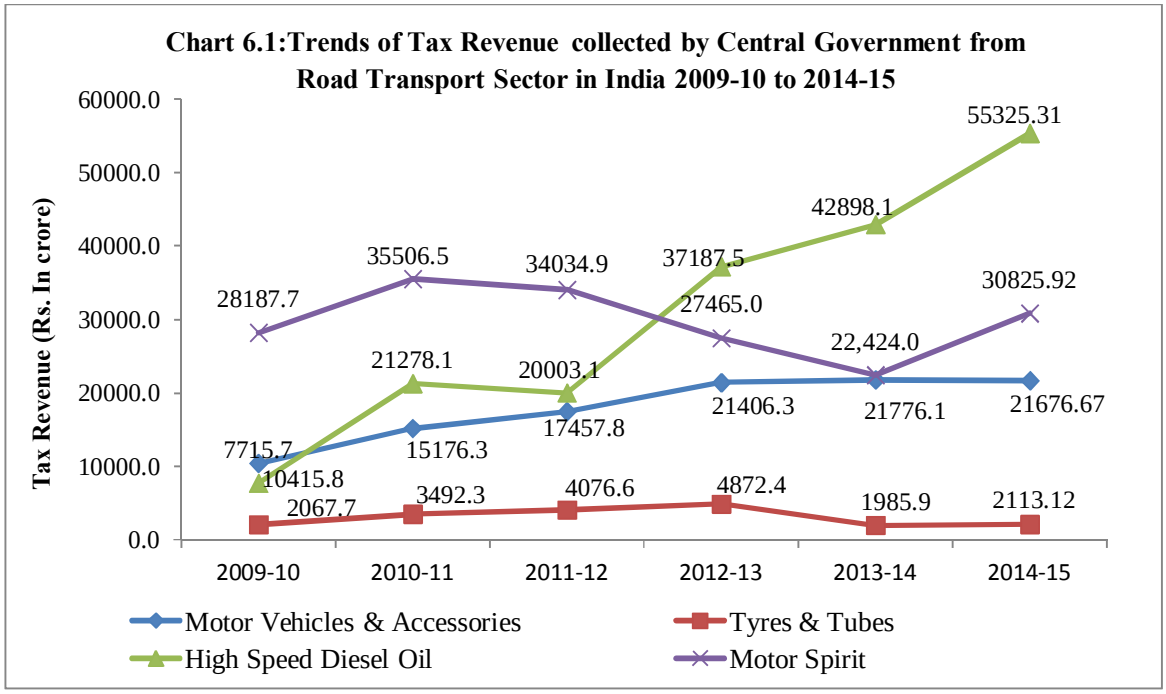
2. In case of India, for GNI per capita data, the source is World Road Statistics, 2015, International Road Federation, Geneva and for passenger car, total motor vehicles and two wheelers, data sources are the Offices of State Transport Commissioners/UT Administrations.

Section – 6

Road Transport and Motor Vehicle Taxation in India

6.1 Under the federal set up in India, the centre, states and local authorities have well defined powers of taxation and management of road transport, as earmarked in the Seventh Schedule of the Constitution. The Union Government of India levies import duties on the import of diesel, motor spirit, tyres and tubes and vehicle and spare parts/accessories; and excise duties on diesel, motor spirit, tyres and tubes, and vehicle and spare parts/accessories, produced or manufactured in India. The Union Government also levies service tax on certain road transport services. The State Governments levy different types of taxes on road transport. These taxes include sales tax/VAT on motor spirit and lubricants and specific taxes like motor vehicle taxes, fees, tax on passengers and goods. Motor Vehicle Taxes (MVT) is levied in all States and Union Territories (UTs) except UT of Lakshadweep. The existing tax structure of motor vehicles in India is characterized by variations in tax structures, incidence, tax rates and bases of levies.

6.2 **Central Government Levies**: The import duties and excise duties on motor vehicles & accessories, tyres and tubes, high speed diesel oils & motor spirit collected by central government from Road Transport Sector is shown in chart 6.1 and also indicated at Annexure 6.1.

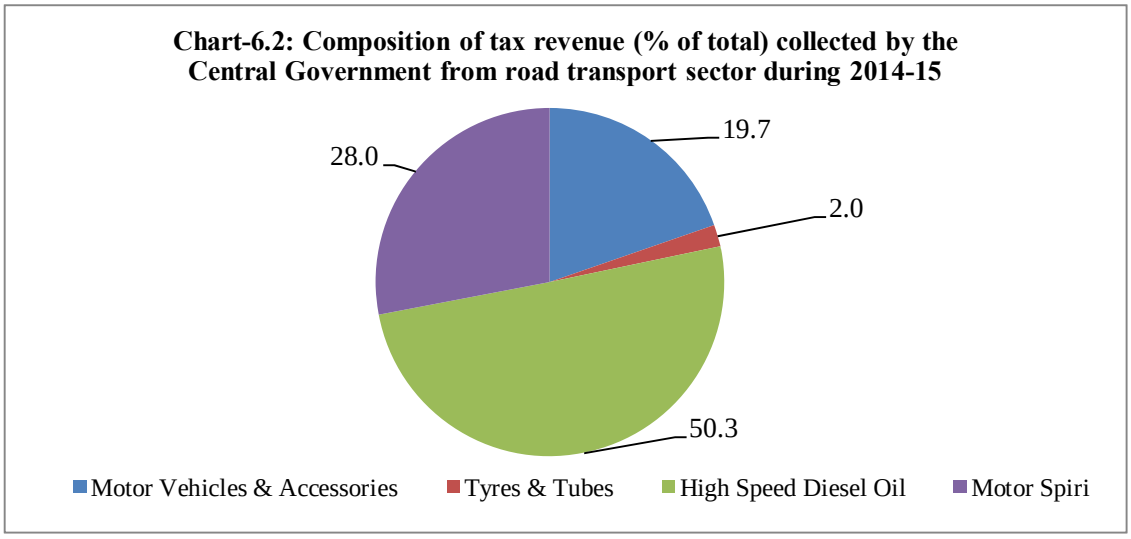


Source: Directorate of Data Management, Central Excise and Custom.

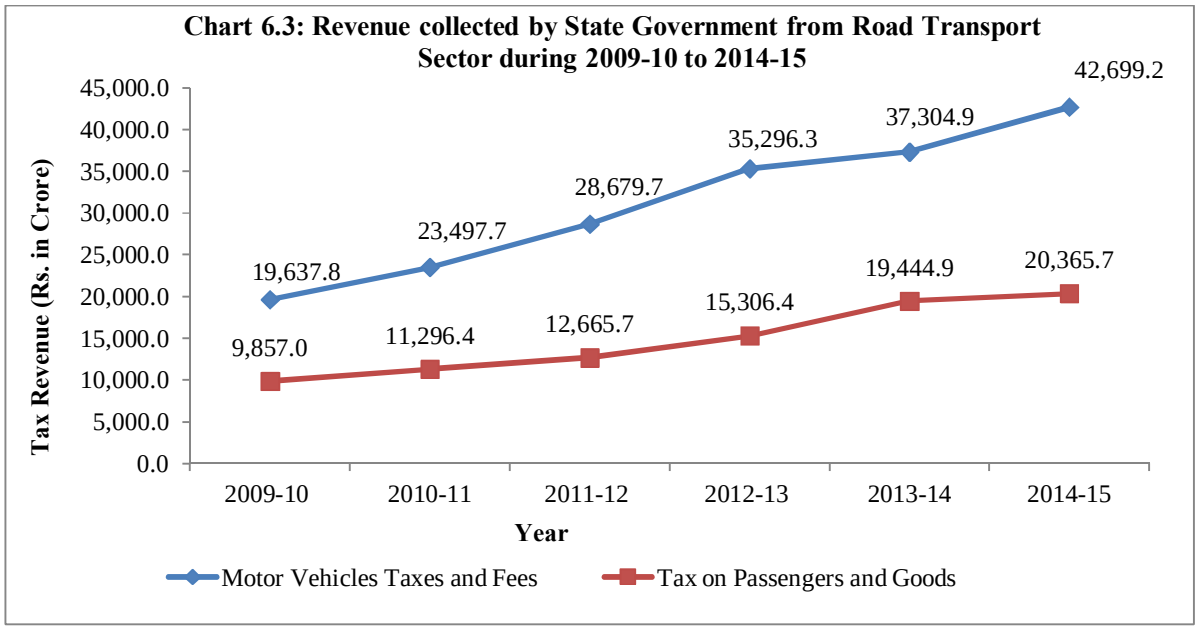
6.3 Chart-6.1 depicts that revenue collected by central government from motor vehicles & accessories increased from Rs. 10415.9 in 2009-10 to Rs. 21,776.1 crore in 2013-14 and Rs.21676.7 crore in 2014-15. Revenue collected by central government from tyres & tubes increased from Rs. 2067.7 crore in 2009-10 to Rs.1985.9 crore in 2013-14 and Rs. 2113.1crore in 2014-15. Revenue collected by central government from high speed diesel oil increased from Rs. 7715.7 crore to Rs. 42898.1 crore in 2013-14 and Rs. 55325.3 crore in Rs. 2014-15 and revenue collected by central government from motor spirit increased from 28187.7 crore in 2009-10 to Rs. 22424 crore in 2013-14 and Rs.30,825.9 crore in 2014-15.

6.4 However, in the case of Motor Vehicles & Accessories, though, there was a continuous increase in collection of revenue from 2009-10 (Rs. 10,415.9 crore) to 2013-14 (Rs. 21,776.1crores), the tax collected slightly declined to Rs. 21,676.7 crore during 2014-15. There was a continuous increased in collection of tax revenue from tyres & tubes since 2009-10 (Rs. 2,067.7 crore) to 2012-13 (Rs. 4,872.4 crore), the tax collected declined to Rs. 1,985.9 crore during 2013-14 and again increased to Rs. 2,113.1 crore in 2014-15. In respect of High speed diesel oil, there was a steep increase from Rs. 7,715.7 crore in 2009-10 to Rs. 21,278.1 crore in 2010-11 but decreased in 2011-12 to Rs. 20,003.1 crore after that again increased Rs. 37,187.5 crore in 2012-13 to Rs. 55,325.3 crore in 2014-15. The revenue collected from motor spirit increased from Rs. 28,187.7 crore in 2009-10 to Rs. 35,506.5 crore in 2010-11 and thereafter witnessed a declining trend since the year 2011-12 to Rs. 34,034.9 crore in 2011-12, Rs. 27,465.0 crore in 2012-13 and Rs. 22,424.0 crore in 2013-14 and increased in 2014-15 to Rs. 30,825.9 crore.

6.5 The percentage share of revenue collected by central government from high speed diesel oil was highest 48.2% in the year 2013-14 and 50.3% in the 2014-15 followed by motor spirit 25.2% and 28.0% during the year 2013-14 and 2014-15 respectively, motor vehicles & accessories 24.4% in the 2013-14 and 19.7% during the year 2014-15 and tyres & tubes 2.2% in the year 2013-14 and 2.0% during 2013-14. The composition of tax revenue collected by central government from road transport sector as on 31st March, 2015 is shown in chart-6.2.



6.6 State Government Levies: The motor vehicle taxes and fees, sales tax/VAT on motor spirit and lubricants and passengers and goods tax collected by state governments from road transport sector during the period 2009-10 to 2014-15 are shown in chart-6.3 below. The combined amount of revenues realised by State Government from road transport from 1950-51 to 2014-15 is given at Annex 6.2.

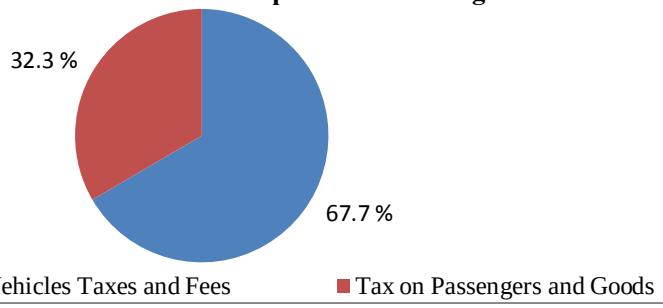


Source: State Finances- A Study of Budgets 2012-13 by Reserve Bank of India
Note: Reserve Bank of India have not reported the data for Sales Tax/ VAT on Motor Spirit and Lubricants from 2012-13 to 2014-15

6.7 Chart 6.3- depicts that the revenue collected by state governments from motor vehicle taxes & fees increased from Rs. 19,637.8 crore in 2009-10 to Rs 37,304.9 crore in the year 2013-14 and Rs. 42,699.2 crore in 2014-15. The revenue collected from Tax on passengers and goods has also shown an increasing trend from Rs. 9,857.0 crore during 2009-10 to Rs. 19,444.9 crore and Rs. 20,365.7 crore during the year 2013-14 and 2014-15 respectively.

6.8 Chart-6.4 depicts the percentage share in the total tax revenue collected by state governments during 2014-15. The motor vehicle taxes and fees accounted for share of 67.7% and tax on passengers and goods accounted for share of 32.3%.

Chart-6.4: Composition of tax revenue (% of total) collected by State Governments from road transport sector during 2014-15



6.9 The revenue generated by States and UTs with legislatures from tax on motor vehicles and taxes on goods and passengers constitutes, on an average, 7.5 percent of their combined own tax revenue in 2014-15 (Annexure 6.5). The magnitude of the revenue significance of these taxes differs widely across States; from as low as 2.9 percent of its own tax revenue in case of Tripura to 50.2 percent of own tax revenue for Arunachal Pradesh. Among major States, the revenue from motor vehicle and goods & passenger taxes constitute significantly higher proportion of own tax revenue for Bihar (19.9%), Orissa (14.1%), Madhya Pradesh (12.5%), Chattisgarh (11.8%) and Karnataka (10.8%).

6.10 The existing regime of taxation on road transport and motor vehicles is characterised by multiplicity and wide inter-State variations. This problem is expected to be alleviated when Goods and Services Tax (GST) comes into operation. It would also imply that States would be losing their discretionary power over potentially buoyant source of revenue such as the motor vehicle tax.

6.11 Structure of Motor Vehicle Taxation in India: States have the exclusive powers to levy passenger and goods tax but their power to tax motor vehicles is subject to the general regulatory

provisions of Central laws on the subject. At present, the tax rate across the States/Union Territories (UTs) on motor vehicles varies from 2% to 21%. The existing structure of tax on motor vehicles with respect to two-wheelers, cars, passenger vehicles and goods is given below:

6.12 Most of the States have switched over to life time tax (LTT) except for a few like Mizoram, Odisha, Sikkim, Tripura, Andaman & Nicobar, Dadra & Nagar Haveli and Daman & Diu in respect of two-wheelers. In some States, tax slabs for LTT for two-wheelers are based on engine capacity (Himachal, Manipur, Rajasthan, Tripura, West Bengal and Puducherry); in some states it is the unladen weight (Assam, Meghalaya and Odisha) and in some states (Arunachal Pradesh, Jammu & Kashmir and Jharkhand) it is on lump sum basis. Other States/UTs follow life time tax based on purely the value/cost of the vehicle (Andhra Pradesh, Bihar, Chhattisgarh, Goa, Gujarat, Haryana, Karnataka, Kerala, Madhya Pradesh, Maharashtra, Nagaland, Punjab, Tamil Nadu, Telengana, Uttrakhand, Uttar Pradesh, Chandigarh and Delhi).

6.13 In the case of cars, some of the States/UTs which follow engine capacities are Sikkim, West Bengal while Puducherry follow unladen weight as the basis. In Himachal Pradesh the basis of MVT is engine capacity in conjunction with the percentage of cost of vehicle. States like Jharkhand follow the basis of seating capacity. However, most of the States/UTs now follow life time tax based on the value/cost of the vehicle (Andhra Pradesh, Assam, Bihar, Chhattisgarh, Goa, Gujarat, Haryana, Karnataka, Kerala, Madhya Pradesh, Maharashtra, Meghalaya, Nagaland, Odisha, Punjab, Rajasthan, Telengana, Tamil Nadu, Tripura, Uttarakhand, Uttar Pradesh, Chandigarh, Dadra & Nagar Haveli, Daman & Diu and Delhi). The taxes are annually in the state of Mizoram.

6.14 In the case of passenger transport vehicles like stage or contract carriages, the seating capacity forms the basis for levying tax. Motor vehicle taxation of passenger buses is mainly on the basis of an upper seating capacity limit (per seat per quarter/annum) and treated differently from motor cars and jeeps. In many States differentiation in tax treatment of passenger buses is also accorded on the basis of type of service (Ordinary/Luxury/Express etc). Some States, for example, Andhra Pradesh, Chhattisgarh, Madhya Pradesh and Odisha also include the distance that the vehicle is permitted to ply as an additional element for determining the quantum of tax. In some States routes are divided into different categories in terms of region with a different rate of tax for each, e.g. in Andhra Pradesh (based on moffusil versus town) and Maharashtra (based on city versus rural areas). Another distinction particular to the taxation of commercial passenger vehicles is that between stage carriages and contract carriages.

6.15 Goods vehicles are almost always taxed on the basis of the registered laden weight (RLW) or gross vehicle weight (GVW) or unladen weight (ULW). For goods vehicles, in most of the States, the basis for taxation is registered laden weight (RLW)/gross vehicle weight (GVW). As far as tax on goods vehicle is concerned, the de facto tax rate everywhere is a specific rate calculated on the basis of ULW, GVW/RLW or payload.

Section – 7

Other Parameters of Road Transport

7.1 This report includes information on important parameters of road transport in the Annexure which are not accommodated in the descriptive sections. Brief description/explanation of these annexure tables are given below in the form of bullet points.

- **Number of Buses Owned by the Public and Private Sectors in India:** A statement indicating the number of Buses Owned by the Public and Private Sectors in India- 1961-2015 is illustrated in Annex 7.1. Public sector buses are owned and operated by State Road Transport Undertakings (SRTUs). The total number of buses of the private sector is derived from the total number of buses less of those in public sector (SRTU buses). A statement of State/UT wise total Bus Fleet and Buses in Public Sector (SRTUs) is illustrated in Annex 7.2.

- **Production and Sales (Including Exports) of Motor Vehicles in India**: A statement indicating the number of production of Motor Vehicles in India- 2006-07 to 2014-15 is illustrated in Annex 7.3. As per Society of Indian Automobile Manufacturers (SIAM), the industry produced a total of 23,366,246 vehicles including passenger vehicles, commercial vehicles, three wheelers and two wheelers in April2014-March 2015 as against 21,500,165 in April 2013-March 2014, registering a growth of 8.68 percent over the same period last year. A statement indicating the number of sales (including exports) of Motor Vehicles in India- 2006-07 to 2014-15 is illustrated in Annex 7.4. As per SIAM, the total sales (including exports) of Motor Vehicles was 2,33,26,386 including passenger vehicles, commercial vehicles, three wheelers and two wheelers in April 2014-March 2015 as against 2,15,33,807 in April 2013-March 2014, registering a growth of 8.32 percent over the same period last year.

- **Freight and Passenger Movement by Road Transport**: A statement indicating the Freight and Passenger Movement by Road Transport - 1999-2000 to 2014-15 is illustrated in Annexure 7.5. Figures for Freight and Passenger Movement by Road Transport is an estimation basis of actual GDP growth rate and elasticity of Freight and Passenger traffic by the National Transport Development Policy Committee, 2014.

- **Number of Drivers & Conductors Licences issued:** A Statement indicating the States/UTs wise Number of Drivers Licences issued as on 31st March 2014 & 2015 and Number of Drivers Licences issued during the years 2013-14 & 2014-15 is illustrated in Annex 7.6, 7.7, 7.8 and 7.9 respectively. A Statement indicating the State/UT wise number of Conductors Licences issued as on 31st March 2014 & during the years 2013-14 and as on 31st March 2015 & during the years 2014-15 is illustrated in Annex 7.10 and 7.11 respectively.