

# Kerala overtakes bigger states in 2025 personal 4-wheeler EV adoption

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Kerala's middle class households mounted more charging boxes than ever before in 2025, as the state saw the highest share of personal four-wheeler electric vehicles (EV) adoption among the 10 states with EV sales.

Kerala is one of the first states to come out with an EV policy way back in 2019.

Not just that, the state is the joint highest in terms of overall personal EV adoption (including two-wheelers and four-wheelers, among top states) along with Karnataka. The penetration of EVs versus traditional internal combustion engine (ICE) vehicles is also one of the highest in Kerala, standing second only to Delhi in 2025.

According to data shared by Enviro-

catalysts, the penetration of EVs (EV to ICE ratio) in the top states with the highest EV sales includes Delhi with 13.91 per cent, Kerala with 12.08 per cent, Karnataka with 10.64 per cent, Uttar Pradesh with 9.89 per cent, and Madhya Pradesh with 8.23 per cent.

More importantly, the current rise is from a penetration of hardly 5 per cent in 2022, driven by policy measures and improved infrastructure.

"The most important factor that makes Kerala a special market is the fact that the share of personal vehicles in the total EV basket is 93.4 per cent, indicating that the adoption is happening in two-wheelers and four-wheelers," said Sunil Dahiya, founder and lead analyst, Envirocatalysts.

"Though other states like Karnataka have a similar 93.4 per cent share of EVs as personal vehicles, around 84 per cent

## Marching ahead



### Ranking based on EV penetration in India

State	Vehicles registered	EV registered	% EV penetration
Delhi	8,17,705	113742	13.91
Kerala	8,78,591	106111	12.08
Karnataka	1909,775	203160	10.64
Uttar Pradesh	4090570	404760	9.89
Madhya Pradesh	1693879	139433	8.23
Bihar	1506606	123789	8.22
Maharashtra	3287179	266487	8.11
West Bengal	1286342	100972	7.85
Tamil Nadu	2118489	166236	7.85
Rajasthan	1688493	114616	6.79

Source: Envirocatalysts

of them are two-wheelers versus 9 per cent four-wheelers. On the other hand, the share of two-wheelers is only 76 per cent in Kerala, versus 18 per cent

four-wheelers, indicating a larger adoption of EVs among the middle class," said Dahiya.

The rise in EV sales is led by Ather

Energy, Bajaj Auto, and TVS Motor in two-wheelers with a market share of 29 per cent, 24 per cent, and 19 per cent, respectively, in the state, out of a total of 80,261 vehicles sold in 2025.

Ola Electric with 12 per cent, and River Mobility with 6 per cent are the other majors ruling the Kerala market. On the other hand, out of 18,891 private four-wheelers sold in 2025, Tata Passenger Electric Mobility ruled the market with 53 per cent, JSW MG Motor with 26 per cent, and Mahindra Electric Automobile with 11 per cent market share.

### Reasons for higher share

Though Chandigarh and Goa have a higher share of private vehicles in the total EV pie of those states at 61 per cent and 99 per cent, the sales and penetration in those regions are much lower, and not among the top states.

According to industry experts, the reasons for higher penetration are higher awareness among customers.

"The major reason is awareness, as several brands are doing really well in the state. People also see EVs and premium products as a status symbol. In addition to this, charging infrastructure is also widespread," said Anirudh Ravi Narayanan, chief executive officer of electric two-wheeler company BNC Motors. Experts also cite the higher share of the non-resident Indian population, high per capita income, government sops, and adaptability to new brands as reasons for the improved interest in Kerala.

According to data by the ministry of heavy industries, the state has 1,389 charging stations, with 553 fast chargers and 836 slow chargers driven by private players and the Kerala Electricity Board.