

ACMA

Automotive Component Manufacturers Association of India

FUTURE OF MOBILITY

ANNUAL REPORT
2016-17



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SHARED SERVICES



AUTONOMOUS

FUEL CELLS



xEVs



GREEN FUELS





FUTURE OF MOBILITY

ANNUAL REPORT
2016-17

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ACMA

Automotive Component Manufacturers Association of India

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FUTURE OF MOBILITY

Global automotive industry is at a point of inflection. Driven primarily by technological advancement and customer choice, the future of global mobility is about operating in a connected ecosystem with focus on creating a cleaner environment. With the internet of things (IoT), artificial intelligence (AI) and machine learning set to define the way enterprises work, "connected" vehicles -- which are to embrace all of these new-age technologies - are well positioned to emerge as tomorrow's preferred way of life. On one hand, energy storage, electric drive systems, and fuel cell technology all seem to be poised to find a significant place in the automotive marketplace. On the other, coupled with continuing research into fundamental engine processes, the introduction of affordable high-performance computing, and the adoption of advanced manufacturing techniques throughout the industry are leading to disruptive opportunities for engines with extraordinary high efficiencies.

The Indian auto-component industry has to transform and best position itself to service this new-age 'connected and cleaner' transportation system.

For the Auto-Component Industry, AMP revenue target for 2016 was Rs. 1,84,000 crore - Rs. 2,07,000 crore. The industry surpassed its target by registering a turnover of Rs.2,55,635 crore in 2015-16.





PRESIDENT'S MESSAGE



Dear Friends,

At the onset, I extend my deepest gratitude to the ACMA membership for providing me the opportunity to lead the association as its President during 2016-17 as also for the support extended by all stakeholders to collectively chart out the course of action for the Indian auto-component industry as it enters a new phase of its development path.

Over the last few decades, most of us at ACMA, have built credible organisations. In the process, the Indian auto-component industry has not only established itself as a robust sector serving the domestic market but also a preferred global supply base. We are now entering the next phase of development for the industry, where one is witnessing several regulatory initiatives that promote lower levels of vehicular emissions, higher safety

standards and environment protection. It is imperative for us, as an industry body, to acknowledge this changing landscape and gear towards transforming our individual companies to best leverage the new market requirements. To stay relevant, we will have to acquire or develop relevant technologies at a much faster pace.

In this backdrop, for 2017-18, we at ACMA adopted the theme, 'Future of Mobility in India - Challenges & Opportunities for the Auto Component Industry'. Given the current trajectory of growth in the automobile industry worldwide, there is an underlying consciousness on the concerns of an ever-growing vehicle parc in cities and towns. In fact, in the long term, there is now a general global consensus, to mutually reinforce and boost electric mobility (e-mobility) and shared transportation. On one hand, environmentally driven regulations are mobilising lower CO2 emission targets for automobiles across the world on the other, the fast pace of technology developments are becoming an enabler for transformation to EVs, especially with expectations of battery prices becoming affordable in the next few years accompanied by battery charging infrastructure gaining momentum.

Today, the Indian component industry, which is thoroughly integrated into the global supply chain, cannot remain untouched by these changes. Whilst we need to prepare ourselves for this transformation, our hands at this juncture are also full in graduating from BS-IV to BS-VI, which by no means is a small change. Leapfrogging a generation of technology in just three years not only calls for sizeable investments for technology acquisition and absorption, but also for skilling of people.

On the front of e-mobility, we at ACMA believe that while the future is pure-electric, however the logical progression would be to move from IC-engines to hybrids and then to fully-battery based vehicles. This will provide the local industry with the opportunity to develop and best acquire technologies for the future generation of vehicles; the technological progression should be evolutionary rather than disruptive. One should also not lose sight of the fact that ours being a diverse country, the mobility solutions for smaller towns and rural area will be much different from those of metros and larger cities, a mixed-mobility solution seems more pragmatic in this milieu.

A long-term stable, technology-agnostic roadmap for the automotive industry driven by a sound regulatory framework is therefore the need of the hour so that the industry can invest for sustainable growth and development, in line with the aspirations of all stakeholders.

We well understand that there is today a fundamental need to preserve the environment for our future generations and are committed to it. For the auto component industry this may imply drastic changes for many individual players. Time has come for each of us in the industry to accept this new business environment and gear ourselves to cater to the new demands of the future.

The Industry Backdrop

While the regulatory and technologically driven path-shift for the global automobile industry has created some uncertainties, the good news was that Indian automobile market remained buoyant in 2016-17. In fact, according to SIAM, the automobile industry in India produced a total of 25.31 million vehicles, including passenger vehicles, commercial vehicles, three wheelers and two wheelers during 2016-17 against 24.01 million in 2015-16 - a growth of 5.4%. Production of passenger vehicles increased by a healthy 9.4% to 3.7 million units, while overall Commercial Vehicles production registered a growth of 3% from 7,86,692 vehicles in 2015-16 to 8,10,286 vehicles in 2016-17. Two Wheelers production grew by 5.8% to 19.92 million units in 2016-17.

Even global markets were fairly robust during the calendar year (CY) 2016 with total vehicle production increasing by 4.5% to around 95 million vehicles according to OICA. Geographically, the European Union (EU) recorded a growth of 3%, while Asia-Oceania and Africa recorded production growth of 7.6% and 7.9% respectively. The only weak spot was the (-) 0.5% production growth in the Americas.

In this backdrop, despite the challenge of demonetisation and uncertainty in implementation of GST, the performance of the auto component sector was encouraging; the industry grew by 11.7% over the previous year, scaling USD 43.5 billion. Further exports, grew by 1%, reversing the 3.7% de-growth witnessed in FY 2015-16. The Aftermarket was however a silver lining, it grew by 23.5% to USD 8.4 billion. During the year, individual companies did not fundamentally focus on expansive growth but concentrated their energies on enhancing internal efficiencies. ACMA continued to play an active role in supporting its members in this endeavour.

Public Policy Advocacy

The regulatory environment witnessed several key developments in 2016-17, which have far reaching consequences for the entire Indian automotive supply chain.

To begin with, the auto-component industry has played a critical role in supporting the vehicle industry to effectively shift and produce BS-IV compliant products effective April 01, 2017. Further, as mentioned earlier, the Government of

India has also announced an ambitious transition to BS-VI emission standards by 2020. The industry is making all efforts to effectively adapt to these changes, but the changeover requires access and significant investment in newer technologies.

In another major development, India successfully transitioned into a single goods and services tax (GST) tax regime from July 2017, a much-awaited reform. As it turns out, the GST Council did well to make the changeover process 'revenue neutral' for the vehicle industry with a GST of 28% plus a cess ranging from 1-15%, the component industry however has two rates, about 70% of the items are at 28% while the rest at 18%. We have requested the Government that the 18% rate is made applicable for the entire component sector as it is an intermediary one and suffers from challenges of grey market. While, the entire automotive supply-chain had to prepare itself for the GST based business transaction environment, for the reform to be effective and of benefit to the industry, individual automotive players will need to ensure that players that are upstream comply with GST.

The Government of India's 'demonetisation' drive in November 2017 did create uncertainties and had an adverse impact on the whole third quarter of automobile sales in India. While, it had a lesser impact on the CV Segment, sales of two-wheelers and second-hand vehicles were seriously impacted. However, demonetisation is now behind us and most of the segments have bounced back since March 2017.

As is the case globally, e-mobility is fast catching the imagination of our policy makers. While there have been some Government and media reports in the recent past, a definite policy regarding the road map for e-mobility in India is yet to be announced. As an industry body, ACMA is proactively working on the implications of shift towards e-mobility as also a strategic roadmap ahead for the local component industry. Clarity from individual vehicle manufacturers in India on their plans for e-mobility products roll-out and their collective roadmap from SIAM will in turn help the component industry firm-up its roadmap in this direction. We are confident that as hybrid and electric technologies gain traction, vehicle manufacturers will support localisation of components.

We, at ACMA, strongly believe that we need to move ahead on e-mobility keeping two perspectives in mind. For one, we appreciate the vision of the Government of India to make our environment conducive for living, on the other, it is also important to thoroughly evaluate whether pure electric mobility is the only solution or there are other viable solutions that exist in the market. The component industry has deployed around US\$13-14 billion in gross block and employs over 3 million people. There is a lot at stake for IC-engine-powertrains today as more than 50% of ACMA members' revenue is related to this segment. At current, the domestic component industry doesn't have the technologies for zero-emission vehicles. The technological progression therefore should be evolutionary facilitating this paradigm shift for the domestic component industry in India.

Brand Building

ACMA hosted and participated in several global marquee events to promote the Indian auto-component industry. While this report covers these in detail in subsequent section, some notable events in 2016-17 include iAutoConnect 2016-17 at Gurgaon, Automechanika Shanghai, ACMA Northeast Aftermarket Expo 2016, New Delhi Automotive Summit 2017, ACMA Automechanika New Delhi 2017, ACMA Tech Expo In Europe, ACMA Group Participation at Equip Auto Algeria, ACMA Group Participation at Australian Auto Aftermarket Expo, Automechanika Dubai, India - Korea Auto Parts Partnership Meets in South Korea, and many others.

'ACMA Centre for Technology' (ACT), established in 1989, is a specialised group within ACMA that continuously provides guidance to members to improve their manufacturing competitiveness. ACT through its cluster programmes has been playing a major role in transforming Indian companies across tiers into globally competitive entities by sharing best practices. Additionally, ACT has been providing technical support to ACMA memberships through various channels like AOTS Training in Japan, Specialized Trainings seminars in India, JETRO and JIPM Interventions. Today ACT is engaging with several of the leading OEMs to upgrade their entire supply chain. The quality consciousness across ACMA is evident from the fact that as of June 2017, 704 ACMA members have their business systems certified for ISO9000, 597 are certified under TS554, 329 under ISO14001, and 16 members have secured the prestigious Deming Prize and 5 have Japan Quality medals.

Conclusion

The auto-component industry in India is today entering a new phase in terms of global exposure and adoption of technology. The priorities for the future would be to put much greater focus on R&D to help generate intellectual property in India where world class production quality will be a given. This will require a round of transformation for the industry and the road ahead is as interesting as challenging and for the auto-component industry. It is important to acknowledge that a transformation is round the corner and we will have to gear up to it.

Acknowledgements

I sincerely acknowledge the support of the Governments at the Centre and States, who have been extremely receptive to ACMA's suggestions and inputs. I am grateful to the Ministry of Heavy Industry and Public Enterprises, our nodal ministry, for its unstinted support and guidance. This would be the opportune time to place on record my appreciation for the support extended to us by CII, SIAM, IMTMA and other industry bodies.

Finally, as I conclude my term as President, I would like to thank all our members for their unwavering support. I would, particularly, like to thank the Vice President, the

Regional, Committee and Zonal Chairpersons, the Past Presidents, the Chief Mentor-ACT and our Executive Committee members for their guidance and involvement. I also appreciate and applaud the efforts and support provided by the ACMA Secretariat without which we could not have driven this year's agenda.

I am confident that as an industry we will rise to the challenges and with the support of all stakeholders, firmly build on the global-quality manufacturing ethos that we have already established in the last few decades.

Best Wishes
Rattan Kapur

This represents the dual and separate concepts of "connected" - advanced technology to communicate with external systems, and "mobility" - technology and services that optimize the movement of goods and people. It delivers economic value through a wide range of applications that helps to optimise traffic flow, routes and the driver experience, and also evolves an entire economic ecosystem based on adapting these new technologies. The range of services that are emerging at a fast pace to support connected mobility include dynamic navigation systems, remote vehicle diagnostics, automatic notification of emergency resources, an apps store, and on-demand, real-time access to news and entertainment.



CONNECTED



DIRECTOR GENERAL'S MESSAGE

The Indian Auto-Component industry is going through a phase of transition. On one hand, the domestic auto-component market witnessed creditable growth of 11.7% to USD 43.5 billion in 2016-17 despite certain factors like the demonetisation drive slowing the Indian economy temporarily. On the other hand, export markets were under stress with sluggish demand particularly from North America.

Driven by needs of safety, fuel efficiency, sustainability and customer preferences, the Indian automotive industry will undergo a significant transformation. Amendment in Motor Vehicle ACT and legislations on Vehicle Recall, Vehicle Scrappage, alternative fuels and an increased focus on electric mobility will impact the industry dynamics. Historically, the auto component industry has always adapted well to the changing environment and customer needs and the story going forward should be no exception. However, to keep pace with the external dynamics, Indian auto component manufacturers will be required to develop capabilities for in-house design, harness frugal engineering and create product differentiation through innovation at an even faster pace. In addition, the industry will be required to focus on Quality and Innovation more than ever before to graduate from being a 'build to print' industry to one that is 'art to part'. At ACMA, we are well aware that this journey of transformation has begun for all our members and most of our activities in 2016-17 were focused on dealing with a new world of opportunities and challenges for the Indian auto-component industry.

Let me highlight some of the major activities undertaken by ACMA during 2016-17, while the details are provided in the subsequent sections of this report.

ACMA organised the high-powered Second Aerospace and Defence Summit



on 15 May 2016 in New Delhi with the Defence Minister, Mr Manohar Parrikar as Chief Guest. Mr Parrikar highlighted that in 2015-16 the government was able to meet one-hundred per cent defence offset obligation, while in envisions to achieve USD 2 billion worth of exports through offset in the next two years. With world-class quality practices and manufacturing capabilities, the auto components industry in India is well poised to partner with the Defence Sector to achieve this goal. The government will also create the necessary framework, to reform purchasing processes of Defence PSUs, which would benefit all suppliers, especially the MSMEs. This will help realise the Government's vision of Make in India for the Defence sector.

On 26 May 2016, ACMA invited Mr Guenter Butschek, Managing Director and CEO of Tata Motors, for an interactive session with the Executive Committee and also to inaugurate the 3rd ACMA buyers-sellers meet in Ahmedabad. While sharing his vision of transforming Tata Motors and reinvigorating its products be world-class, Mr Butschek also highlighted the need for the component industry to become agile and flexible and focus on technology development, especially in light of changing regulations in terms of safety and environment.

In July 2017, Mr Rattan Kapur President, ACMA 2016-17 led a highly successful India Korea Auto Parts Partnership meet with 40 delegates with an objective to foster strategic partnership, acquire/collaborate technology and explore global opportunities with OEMs, Tier I and Tier 2s. Over 200 Korean companies participated in the partnership meet to get a deeper understanding of the Indian technology on offer.

The 56th ACMA Annual session themed 'Winning with Quality and Innovation' was held on 30 August 2016. The Session also witnessed the annual change of leadership for the association with Mr Rattan Kapur, Chairman and Managing Director, Mark Exhaust Systems Ltd. taking over as the new President while Mr Nirmal K. Minda, Chairman and Managing Director, Minda Industries Ltd. taking over as the Vice President for the term 2016-17.

The Annual Session focused on dynamic changes that the Indian automotive industry is going through. There is indeed a very dramatic shift in landscape for the auto components industry. While Quality and Innovation are going to remain the cornerstones for success, going forward there will be a need for much greater stress on technology development. Globally, the automobile landscape is undergoing a rapid change with the integration of digital and intelligent technologies in vehicles, much higher consideration for environment protection, reduction of fossil fuels, enhancement of safety features and changing user preferences. In addition, the concept of digitization and automation in manufacturing sector is fast emerging. Changes such as these and others will have to be addressed by the auto component industry by investing significantly in R&D and creation of new products.

The Look East Policy to develop the North East region of India is a 'strategic vision' by the Government of India, which could bring China, India, and Southeast Asia closer to high levels of economic integration. With this thought,

ACMA for the first time organised ACMA Aftermarket Expo, North-East in Guwahati in November 2016, with the support from Ministry of Heavy Industries and Public Enterprises, Government of India. We are indeed delighted with the response from the exhibitors and visitors for the maiden ACMA Aftermarket Expo - North East. We endeavour to make this an annual feature so that genuine parts and components reach this part of the country.

It is indeed a matter of grave concern that India leads the world in number of road crash injuries and deaths. Importantly 20% of these happen due to malfunctioning of counterfeit auto-parts; hence there is a general sense of apathy on this subject. Therefore to create awareness, for the first time ACMA launched a road safety initiative called 'ACMA Safer Drives' in line with the spirit of the 'National Road Safety Week' organised by the Ministry of Road Transport and Highways, Government of India, during 9-15 January 2017. During this week, ACMA conducted safety pledges, which received an overwhelming response from over 1.1 million people, including Mr Nitin Gadkari, Hon'able Minister for Road Transport and Highways, Government of India.

The 3rd edition of ACMA Automechanika New Delhi successfully concluded on 24 March 2017. The event reinforced its position as a credible sourcing and networking platform for Indian auto-components and the aftermarket. It was encouraging to witness a 17% growth in business visitors with a total turnout of 15,150. The fair also marked a 28% increase in exhibitors with 552 companies from 17 countries and a 25% rise in exhibition space since 2015.

A two-day conference on 'Preparing Aftermarket for Digital Economy and Road Ahead' addressed the disruptions caused in the aftermarket industry post the Government's demonetization drive. The conference popularised the concept of e-commerce and m-wallets and exposed the audience to new ways of expanding business and transactions. The second day seminar highlighted trends that would define the future of the aftermarket and covered areas such as vehicle telematics, alternate fuels, vehicle servicing, e-retailing and importantly GST and its expected impact on distribution channels.

Finally, the Union Budget 2016 was unveiled on 1 February 2017 by the Finance Minister, Mr Arun Jaitley. The auto component industry welcomed the reduction in corporate tax on MSMEs giving them the much needed encouragement and relief. Further, with the growing content of electronics in vehicles, the budget allocated Rs.745 crores for electronics manufacturing, which is albeit a small beginning but a welcome move.

We, at the secretariat of ACMA, will continue to strive for the development of the industry, and as executive head, I would personally like to thank all my colleagues for their tireless efforts through the year. To all the members and stakeholders of ACMA including government officials, I would like to extend by deepest gratitude for their guidance and support.

Regards
Vinnie Mehta

The EV market is growing worldwide fuelled by stricter environmental norms, technology improvements and cost reduction in energy storage. New registrations of electric cars hit a new record in 2016, with over 750 thousand sales worldwide.

India has in its hands a lifetime opportunity to make a remarkable contribution towards a sustainable future. While the future of mobility in India will eventually mimic the global trend towards electric, however the logical progression would be to move from IC-engines to hybrids and then to fully-battery based vehicles. This will provide the local component industry with the opportunity to develop and best acquire technologies for the future generation of vehicles; the technological progression should be evolutionary rather than disruptive.





SHARED SERVICES

The term shared mobility includes various forms of car-sharing, bike-sharing, ridesharing (carpooling and vanpooling), and on-demand ride services. It can also include alternative transit services, such as paratransit, shuttles, and private transit services (called micro-transit), which can supplement fixed route bus and rail services. With diverse options for mobility on the rise, smartphone apps that aggregate these options and optimize routes for travellers are also proliferating. Today, an astonishing 50% of car owners could imagine sharing their car in the future.

Fuel cell technology for automotive applications is an attractive prospect for automotive manufacturers and consumers alike as it provides a low carbon solution to mobility without the limited range associated with battery electric vehicles. There are number of fuel cell technologies with varying energy densities, efficiencies and can utilize a variety of fuels.



H_2
FUEL
CELLS

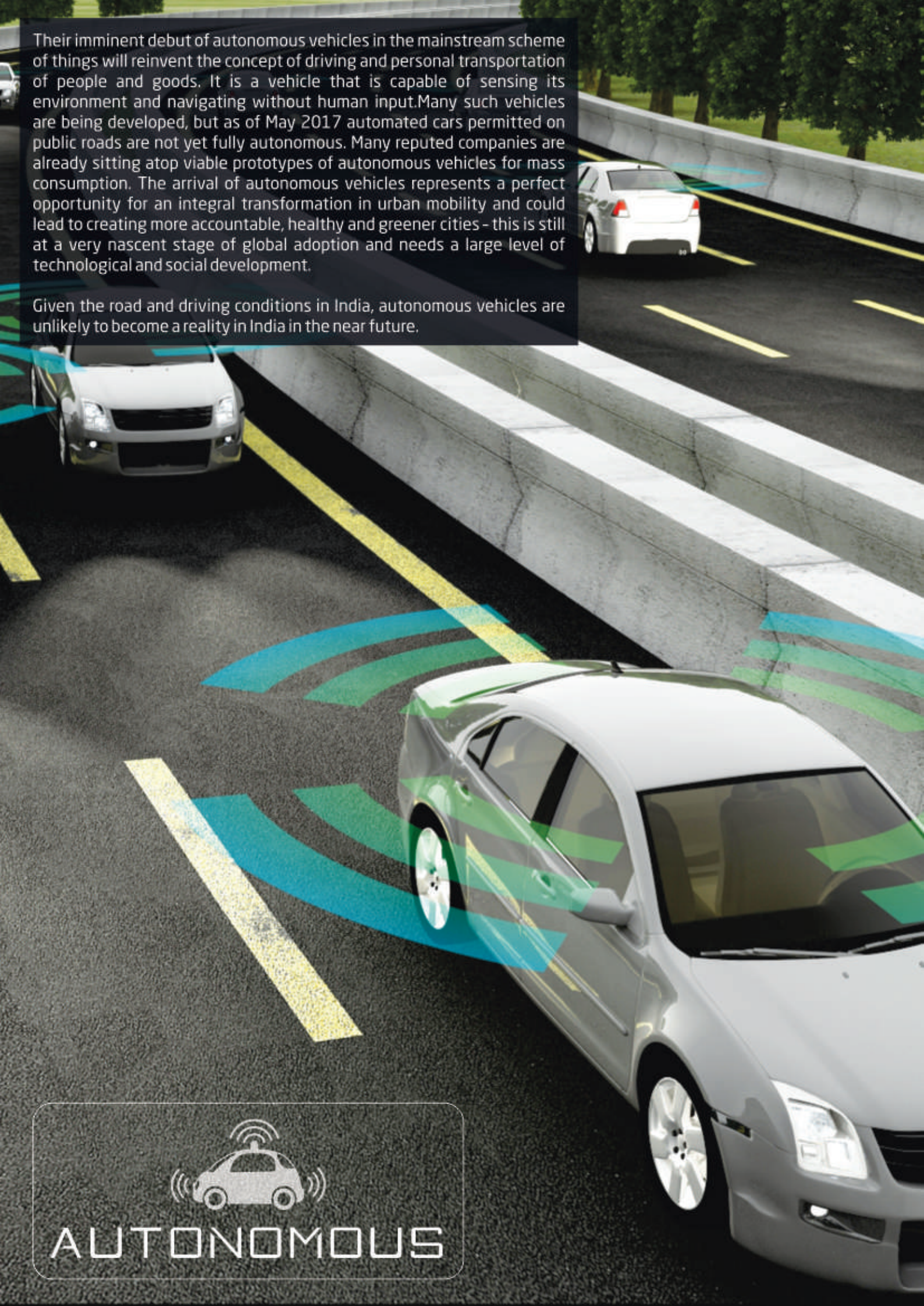
There are more types of green fuel (hydrogen, biodiesel, unleaded petrol, LNG, CNG) than just electricity - and not all of them are available in this country. But green fuels are becoming increasingly important in the search for low-emission, ultra-low emission and zero



GREEN
FUEL

Their imminent debut of autonomous vehicles in the mainstream scheme of things will reinvent the concept of driving and personal transportation of people and goods. It is a vehicle that is capable of sensing its environment and navigating without human input. Many such vehicles are being developed, but as of May 2017 automated cars permitted on public roads are not yet fully autonomous. Many reputed companies are already sitting atop viable prototypes of autonomous vehicles for mass consumption. The arrival of autonomous vehicles represents a perfect opportunity for an integral transformation in urban mobility and could lead to creating more accountable, healthy and greener cities - this is still at a very nascent stage of global adoption and needs a large level of technological and social development.

Given the road and driving conditions in India, autonomous vehicles are unlikely to become a reality in India in the near future.



AUTONOMOUS

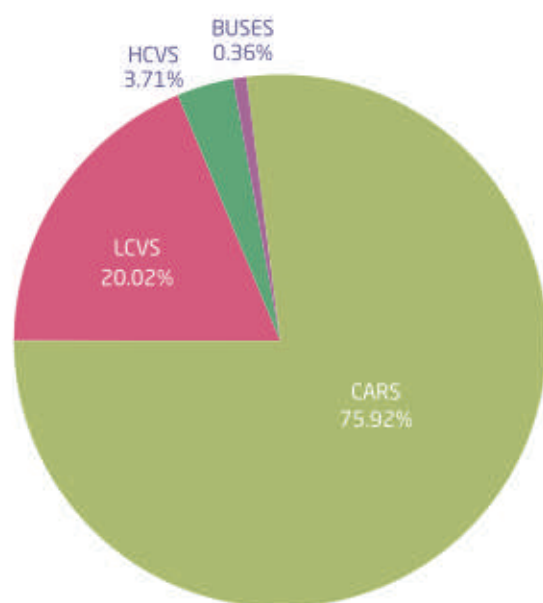
STATE OF THE INDUSTRY

AUTOMOBILE INDUSTRY

GLOBAL MARKETS

Estimates suggest that, globally more vehicles were produced in calendar year (CY) 2016 than ever before in any single year. There was growth in production across every region of the world, except South America. Global vehicle sales, including passenger cars, light commercial vehicles (LCV), heavy trucks (HCV), buses and coaches increased by 4.5% in 2016 to an all-time high of 94.98 million vehicles.

AUTOMOBILE PRODUCTION SHARE BY TYPE (2016)

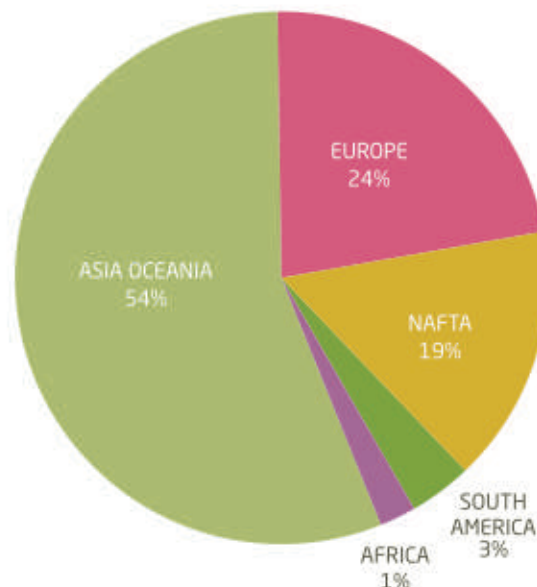


Source: OICA

In terms of type of vehicles, global car production increased by 5.1% to 72.11 million units, while LCV production increased by 2.7% to 19.01 million units, HCV production increased by 3.2% to 3.52 million units, while production of buses increased by 5.2% to 0.34 million units in CY2016

Regional Variations in Production

In Europe, overall vehicle production increased by 2.5% to 21.70 million vehicles in CY2016. In this region, during CY2016, car production increased by 2.5% to 18.95 million units, while LCV production increased by 3.1% to 2.48 million units, HCV production of recorded a low 0.5% growth to 0.23 million units, while buses production reduced by (-) 4% to 39.7 thousand unit. Going forward, experts suggest residual pent-up demand and overall economic recovery is expected to provide impetus to the European auto industry in CY2017.



Automobile Production Share by Regions (2016)

*includes PV, LCV & HCV

Source: OICA

The NAFTA region including USA, Canada and Mexico recorded total vehicle production growth of 1.2% to 18.17 million units in CY2016. Amongst the major markets within NAFTA, vehicle production increased by an impressive 3.8% to 2.38 million units in Canada, a more modest 0.9% to 3.6 million units in Mexico and 0.8% over a much larger base to reach 12.2 million units in USA. Overall, in terms of type of vehicles during CY2016 - car production reduced by (-) 6.2% to 8.82 million units and HCV production was down by (-) 18.1% to 0.42 million, while LCV production increased by 5.7% to 11.05 million units

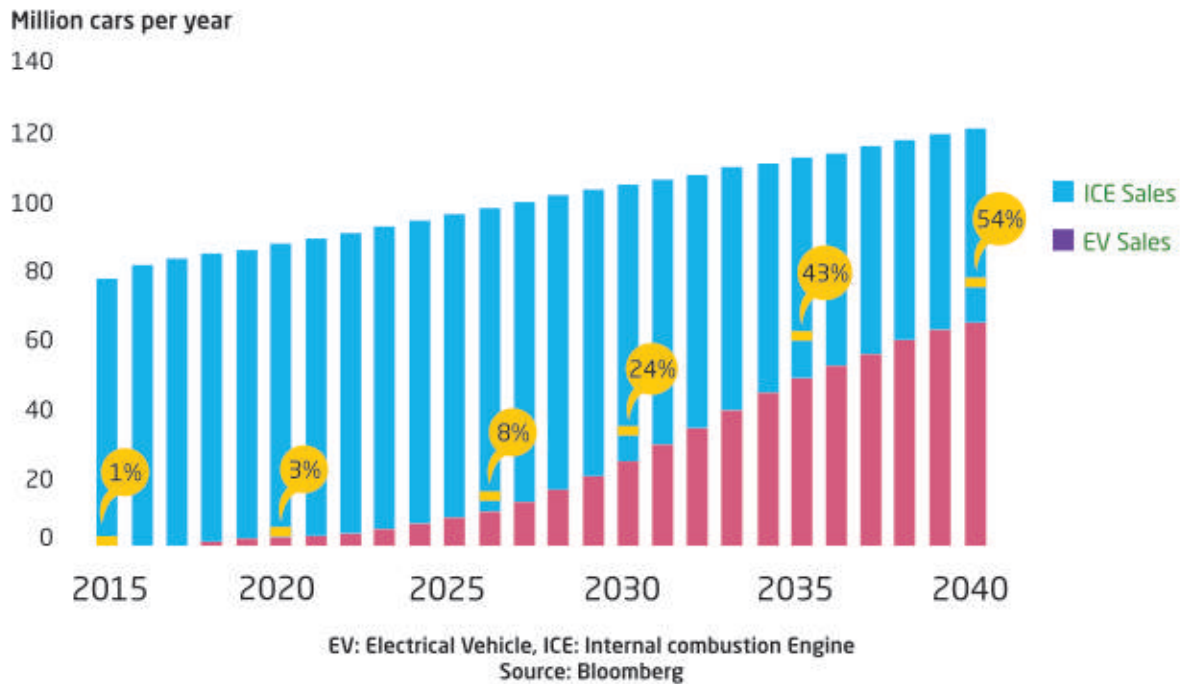
The Asia-Oceania region continued to be the major growth engine for global automobile industry with production growth of 7.6% to 51.52 million units in CY2016. Amongst the largest contributors in this region, China witnessed growth of 14.5% to 28.12 million units in CY2016 and production in India grew by 7.9% to 4.49 million units, while Japan registered a (-) 0.8% lower production to 9.21 million units and South Korea registered (-) 7.2% lower production of 4.23 million units in CY2016.

South America witnessed a sharp (-) 10.6% drop in production to 2.69 million units in CY2016, while Africa, which is still a small production base, clocked 7.9% growth in production delivering 0.9 million vehicles in CY2016.

PROSPECTS FOR 2017 AND THE RAPID EMERGENCE OF ELECTRIC VEHICLES

Forecasts suggest that the global automobile industry will continue to grow in 2017 with the passenger car market alone set to reach sales of nearly 85 million units. However,

FORECAST FOR GROWTH IN ELECTRIC VEHICLES



a major structural shift is expected in the industry towards more environment friendly vehicles particularly the advent of electric vehicles. In fact, it is expected that by 2030 - European and in particular German manufacturers - will impose a mandate for all new cars registered in the country to be emission free.

By 2019 electric drive will be present in practically all series, in the form of plug-in hybrids or purely battery-driven vehicles. The German automotive industry, alone, is expected to invest over €40 billion in alternative powertrains by 2020. However, most experts suggest that in parallel to electric mobility, development of classic powertrains is expected to continue, where there is possibility of 10-15% reduction in fuel consumption too. So, while one expects significant growth in electric vehicles, gasoline and diesel vehicles will also co-exist with much cleaner emission systems.

According to a report by 'Bloomberg New Energy Finance', EV sales is forecast to grow worldwide at a rapid rate over the next few years - from the record 0.7 million units sold in CY2016 to 3 million by CY2021. At that point, they will account for nearly 5% of light-duty vehicle sales in Europe, up from a little over 1% now, and for around 4% in both the U.S. and China. However, the real take-off for EVs will happen from the second half of the 2020s, when first, electric cars becomes cheaper to own on a lifetime-cost basis than ICE models; and, second - arguably an even more importantly as it makes a psychological dent in the minds of buyers - when their upfront costs fall below those of conventional vehicles.

INDIA
PRODUCTION

The industry produced a total of 25,316,044 vehicles including passenger vehicles, commercial vehicles, three wheelers, two wheelers and three wheelers in 2016-17 as against 24,016,599 in 2015-16, registering a growth of 5.41%.

Passenger Vehicle production increased by 9.4% to 37,91,540 units in 2016-17, while commercial vehicle production increased by 3% to 8,10,286 units in 2016-17. While two wheeler production increased by 5.8% to 1,99,29,485 units in 2016-17 three-wheeler production reduced by (-)16.2% to 7,83,149 units in 2016-17.

DOMESTIC SALES

Sales of passenger vehicles in India during the fiscal year ended 31 March, 2017 crossed three million for the first time, growing at the fastest rate in six years, largely on the back of demand for sports utility vehicles (SUVs), according to data released by Society of Indian Automobile Manufacturers (SIAM).

Passenger Vehicle sales grew by 9.2% in 2016-17. Within the Passenger Vehicles segment - Passenger Car sales increased by 3.9%; utility vehicles by 29.9%; and vans by 2.4% in 2016-17. The overall Commercial Vehicles segment registered a growth of 4.2% in 2016-17 with in Medium & Heavy Commercial Vehicles (M&HCVs) growing by only 0.04% and Light Commercial Vehicles (LCVs) growing by 7.4%.

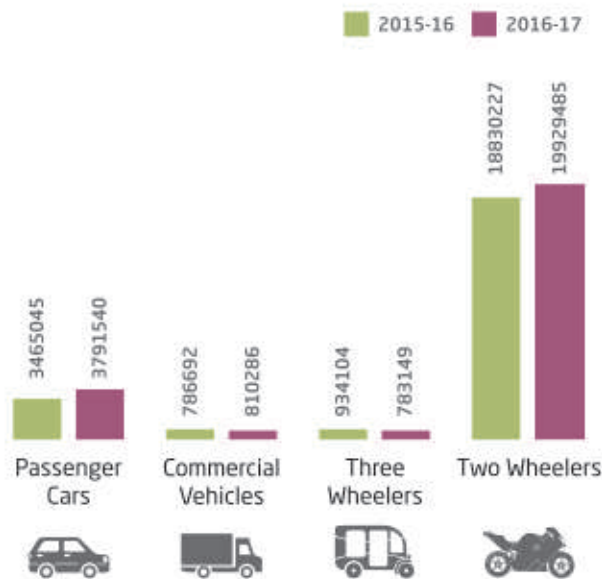
Three Wheelers sales declined by (-) 4.9% in 2016-17 - Passenger Carrier sales declined by (-) 8.8 percent while Goods Carrier sales grew by 12.8% in 2016-17.

Two Wheelers sales registered a growth at 6.9% in 2016-17. Within the Two Wheelers segment, Scooters, Motorcycles and Mopeds grew by 11.4%, 3.7% and 23.02% respectively in April-March 2017 over April-March 2016.

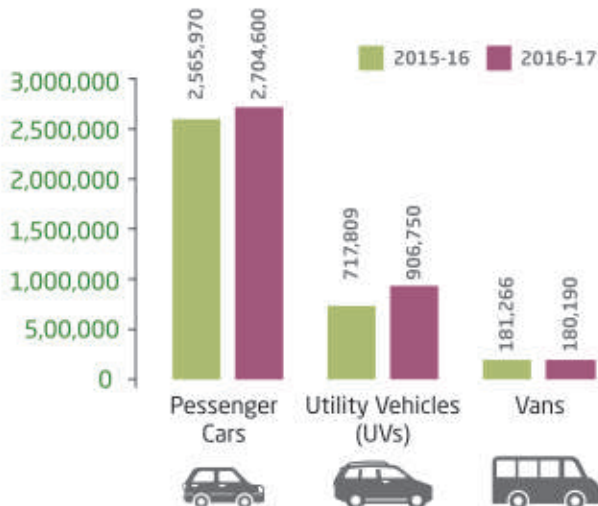
EXPORTS

In 2016-17, overall automobile exports declined by (-) 4.5%. While Passenger Vehicles and Commercial Vehicles exports registered a growth of 16.2% and 4.99% respectively, exports of Three Wheelers and Two Wheelers declined by (-) 32.8% and (-) 5.8% respectively in 2016-17 compared to 2015-16.

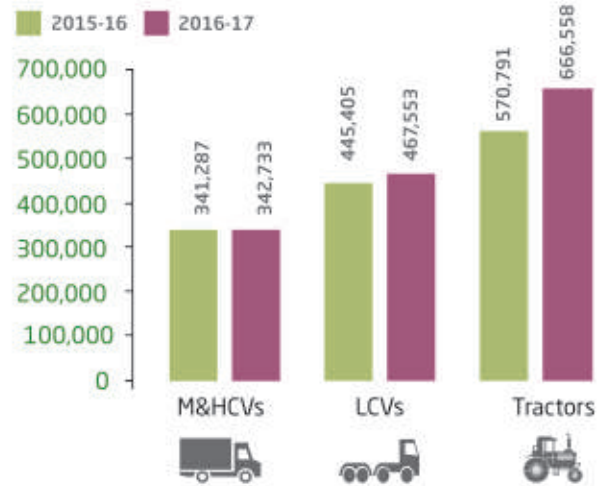
PRODUCTION NUMBERS



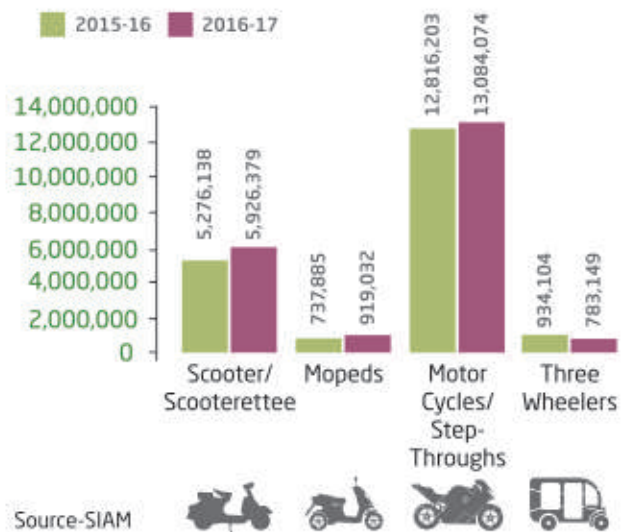
TOTAL PASSENGER VEHICLE PRODUCTION UP BY 9.4% IN INDIA



TOTAL COMMERCIAL VEHICLE PRODUCTION IN INDIA UP BY 3% WHILE TRACTORS UP BY 17%



TOTAL TWO WHEELER PRODUCTION UP BY 5.8% IN INDIA, WHILE 3 WHEELER PRODUCTION WAS DOWN



Source-SIAM

SIAM issued a conservative forecast for 2017-18 expecting sales growth in the range of 7-9% as it envisages cost of ownership increasing to 6% during the year on rising raw material and fuel costs. It also expects fewer SUVs to be launched during the year.

Prices of some of the key commodities used in automobiles, such as steel, aluminium, natural rubber and copper have risen sharply in the last six months. For instance, the price of copper has risen 26%. Average oil prices, another crucial factor for vehicle sales, remained at USD 44 in 2016. SIAM expects the production cut announced by the Organization of Petroleum Exporting Countries to cause prices to rise to USD 50-55 in 2017.

These factors will be offset by easing of finance costs, the economy's recovery from the invalidation of high-value currency notes announced last year and improved consumer confidence. According to a Nielsen report, India's consumer confidence rose to the highest level in 10 years

Imports of auto components increased by 9.3% from Rs.82,900 crore (USD 13.58 billion) in 2014-15 to Rs.90,600 crore (USD 13.82 billion) in 2015-16; Asia and Europe contributed to 58.6% and 30.9% of the imports respectively, while by North America accounted for 7.9%.

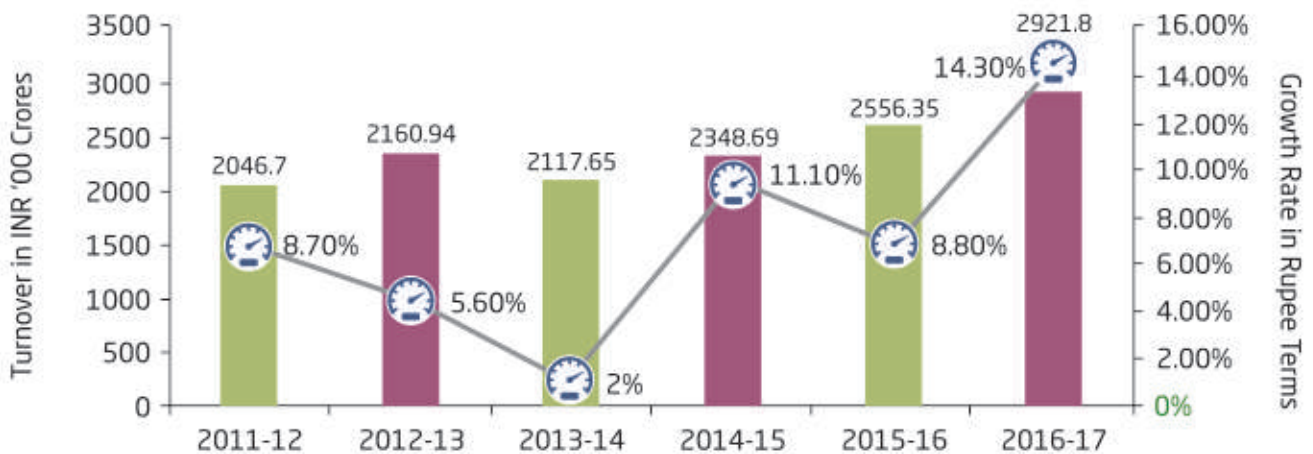
INDIAN AUTO-COMPONENT INDUSTRY

The Indian auto-component industry witnessed 14.3% growth in turnover from Rs.255,635 crore (USD 39 billion) in 2015-16 to Rs.292,184 crore (USD 43.5 billion) in 2016-17. Much of the growth was driven by domestic sales while exports registered only 3.1% growth from Rs. 70,916 crore

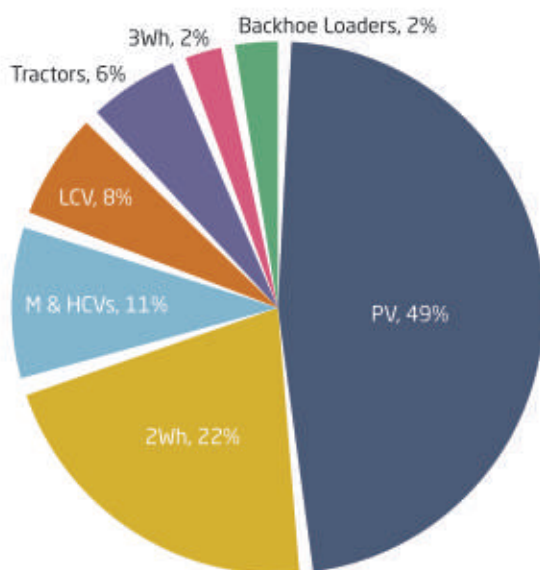
(USD 10.8 billion) in 2015-16 to Rs.73,128 crore (USD 10.9 billion) in 2016-17.

There was strong domestic demand from passenger cars and two wheelers while CV sales were affected by lower industrial production and sluggish replacement demand. Exports growth was affected by lower growth in Europe and uncertainties in the US. In fact, midway through 2016-17, the sector ran into rough weather both at home and abroad. Domestic sales were affected in the cash dependant segments of two wheelers, tractors and the after-market during the demonetisation phase.

INDIAN AUTO-COMPONENTS INDUSTRY - ANNUAL TURNOVER AND GROWTH



SEGMENT WISE AUTO COMPONENT SUPPLY DISTRIBUTION TO OEMs

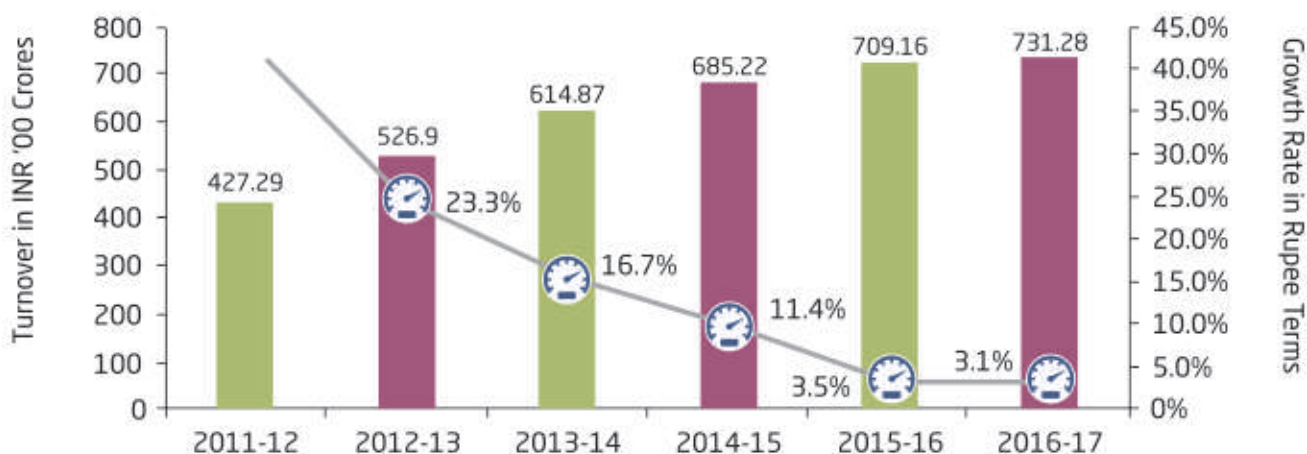


*OEMs consumption includes locally produced components & imports

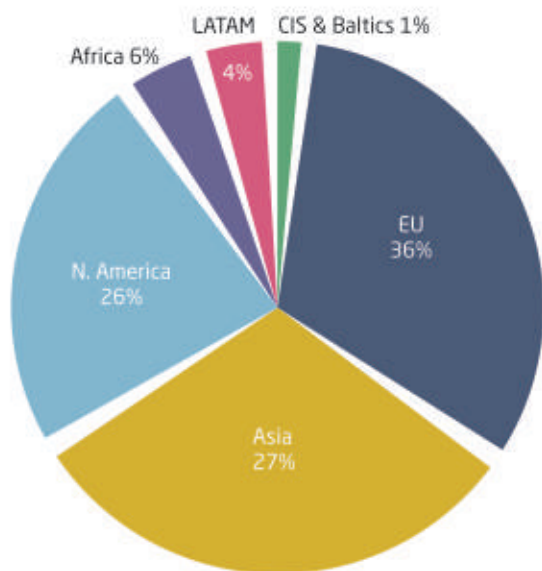
EXPORTS

- Exports increased to Asia (4.6%), Europe (2.6%) whereas, exports decreased to North America (-3.8%) as exporters catered to regions with rising export demand
- Engine, transmission and steering parts' contribute ~40% of the overall auto component exports from India; the rest ~60% is contributed by the segments such as chassis, bumpers, rubber products etc.
- Increasing trends in Exports supported by increasing technical collaborations making India manufacturing hub for exports, increased focus on India sourcing for global locations and Indian manufacturers securing supplies to global OEMs

INDIAN AUTO COMPONENTS EXPORTS



EXPORTS - SHARE OF REGIONS



TOP 10 COUNTRIES

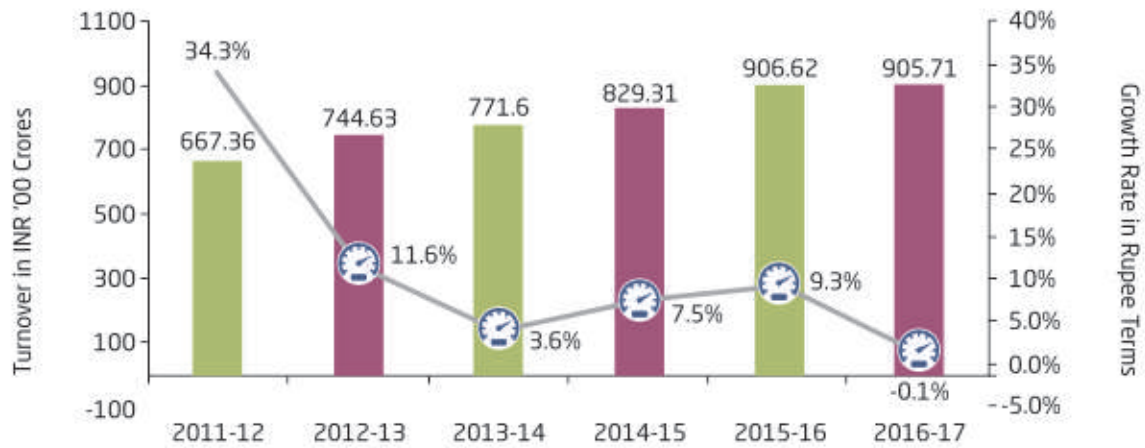
SHARE OF EXPORTS FY-17

TOP 10 COUNTRIES	SHARE OF EXPORTS FY-17
USA	22.0%
GERMANY	7.0%
TURKEY	6.2%
U.K.	5.1%
ITALY	4.1%
THAILAND	3.3%
FRANCE	3.0%
U.A.E.	2.8%
MEXICO	2.8%
BRAZIL	2.6%

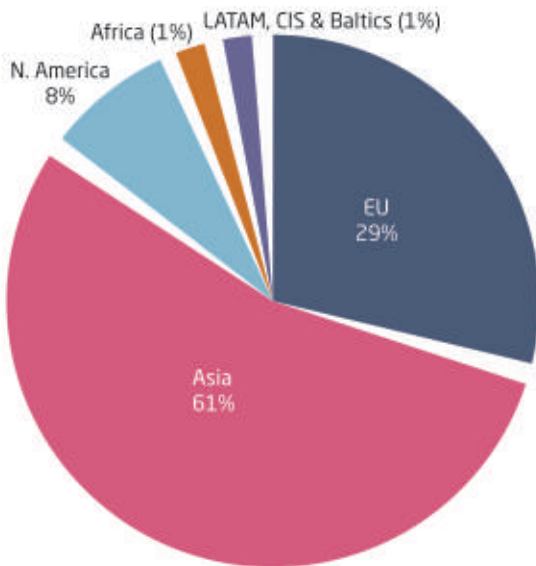
IMPORTS

- Imports increased from Asia (2.4%), whereas imports decreased from N America (-14.6%), and Europe (-7.3%)
- Engine, transmission, steering and suspension parts account for > 50% of overall auto-components being imported
- Technological collaboration of Indian players with global majors, anti-dumping duties on import of select products in M&HCV from China, OEMs' focus on India localization to improve cost competitiveness and replacing N. America or Europe imports through cheaper Asian substitutes are some of the factors for reducing imports trend

INDIAN AUTO COMPONENTS IMPORTS



IMPORTS - SHARE OF REGION



TOP 10 COUNTRIES

SHARE OF IMPORTS FY-17

TOP 10 COUNTRIES	SHARE OF IMPORTS FY-17
CHINA	26.4%
GERMANY	13.0%
JAPAN	11.7%
S. KOREA	11.4%
THAILAND	6.9%
U.S.A.	6.7%
ITALY	3.0%
U.K.	2.5%
FRANCE	1.8%
CZECH REPUBLIC	1.6%

ABOUT THE ORGANISATION

INTRODUCTION

Established in 1959, the Auto Component Manufacturers' Association (ACMA) is committed to the objectives of its charter, which is to develop a globally competitive Indian Auto Component Industry and strengthen its role in national economic development as also promote business through international alliances.

The apex body, ACMA has been relentlessly promoting the interests of the Indian auto-component industry for the last 5 decades whether it be for global promotion, conducive policy environment or enhancing internal efficiencies.

ACMA's active involvement in trade promotion, technology up-gradation, quality enhancement and collection and dissemination of information has made it a vital catalyst for this industry's development. The other activities include participation in international trade fairs, sending trade delegations overseas and bringing out publications on various subjects related to the automotive industry

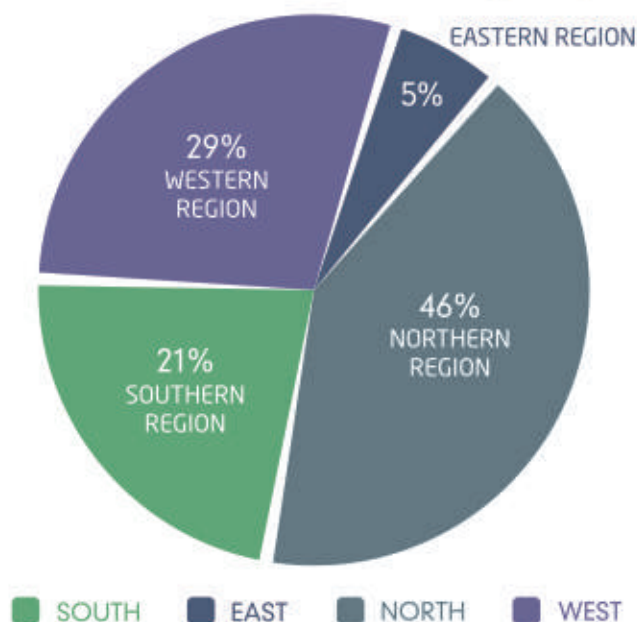
MEMBERSHIP

Today, with over 780 companies as members, ACMA represents around 85% of the entire auto-component sector turnover in the organised sector in India. Its members comprise of companies all across India that either supply directly to OEMs or tier one and tier two companies.

ACMA MEMBERSHIP (As of March 2017)

REGIONS	MEMBERSHIP
Eastern Region	37
Northern Region	356
Southern Region	163
Western Region	226
Total	782

ACMA MEMBERS - REGIONAL PRESENCE (INDIA)



REPRESENTATION

The organisation is represented in all government and industrial bodies in India pertaining to the auto-component industry. In terms of affiliations and partnership with other industry bodies, ACMA continued its work with the Associated Chambers of Commerce and Industry of India (ASSOCHAM), Confederation of Indian Industry (CII) and Federation of Indian Chambers of Commerce and Industry (FICCI). The organisation continued its regular interface with the Society of Indian Automobile Manufacturers (SIAM), Automotive Research Association of India (ARAI), Indian Machine Tools Manufacturers Association (IMTMA), National Automotive Testing and R & D Infrastructure Project (NATRIP), Automotive Skill Development Council (ASDC) and other member Association of the Associations Councils of CII.

ACMA continues to be represented on the following government bodies:

- Automotive Industry Standards Committee
- Automotive Research Association of India (ARAI)
- Automotive Skill Development Council (ASDC)
- Bureau of Indian Standards (Transport Engineering Division)
- Central Motor Vehicles Rules-Technical Standing Committee
- Development Council for Automobiles and Allied Industries
- Development Council for the Machine Tool Industry
- Indo-German Joint Working Group on Automotive Sector
- India-Netherlands Joint Working Group on Automotive Sector

- National Automotive Board
- National Automotive Testing and R&D Infrastructure Project (NATRIIP)
- National Board for Electric Mobility
- WP.29 and Subsidiary technical bodies of WP. 29

INTERNATIONAL ALLIANCES

With an increased focus on globalisation of the Indian auto-component industry, ACMA has developed strong relationships with several counterpart organisations across

the world that help better integrate the Indian auto-component industry in the global supply chain.

SECRETARIAT

The operations are executed by a strong secretariat with a presence across all regions of India. In keeping with ACMA's continuous pursuit for excellence, the system and processes across the functions of the secretariat have adopted best practices, and ACMA has been certified as ISO 9001-2008 institution for quality.

COUNTRY	ORGANISATIONS	MOU Partners
Brazil	Brazilian Association of Automotive Components Manufacturers (SINDIPECAS)	
Canada	Automotive Parts Manufacturers Association (APMA)	
Egypt	Egyptian Auto Feeders Association	
France	Federation Des Industries Des Equipments Pour Vehicules (FIEV)	
Germany	Verband der Automobilindustrie (VDA)	
Germany	Fraunhofer-Gesellschaft zur Foerderung der Angewandten Forschung e.V.	
Germany	ACMA-Messe Frankfurt - Trade Fairs	
Hungary	MAJOSZ (Association of Hungarian Automotive Component Manufacturers)	
Iran	Iranian Autoparts Manufacturers Association (IAPMA)	
Italy	Unione Industriale Torino (UIT)	
Japan	Japan Auto Parts Industries Association (JAPIA)	
Korea	Korea Auto Industries Cooperative Association (KAICA)	
Korea	Korea Trade Centre (KOTRA)	
Kazakhstan	Association of Kazakhstan Auto Business (AKAB)	
Malaysia	Malaysian Automotive Component Parts Manufacturers Association (MACPMA)	
Nigeria	National Automotive Council (NAC)	
Pakistan	Pakistan Association of Automotive Parts and Accessories Manufacturers (PAAPAM)	
Russia	National Association of Automotive Components Manufacturers (NAPAK)	
South Africa	The National Association of Automotive Components & Allied Manufacturers (NAACAM)	
South Korea	Economic Cooperation Agreement between Gunsan City, Jeollabuk-do Province, Republic of Korea & ACMA	
South Korea	Gwanju Aftermarket Council (GAC)	
Spain	Asociacion Espanola de Fabricantes de Equipos y Componentes para Automocion (SERNAUTO)	
Sri Lanka	Sri Lanka Automotive Component Manufacturers Association (SLACMA)	
Sweden	Scandinavian Automotive Suppliers Association (SASA)	
Taiwan	Taiwan Telematics Industry Association	
Thailand	Thai Auto-Parts Manufacturers Association (TAPMA)	
Tunisia	UTICA / L' Association Tunisienne des Fabricants de Composants Automobiles (UTICA/ATFCA)	
Turkey	Association of Automotive Parts & Components Manufacturers (TAYSAD)	

UK	The Society of Motor Manufacturers & Traders Ltd. (SMMT)
USA	The Motor & Equipment Manufacturers Association (MEMA)
USA	Society of Automotive Engineers (SAE)
USA	Original Equipment Suppliers Association (OESA)
USA	Auto Care Association (earlier known as Automotive Aftermarket Industry Association - AAIA)
Uzbekistan	The Association of the Enterprises of Automotive Industry of the Republic of Uzbekistan (UZAUTOSANOAT)

ACMA QUALITY POLICY

ACMA is committed to provide leadership and quality services to its customers. This would be achieved by:

- Evolving & delivering innovative services through consensus and in partnership with members/other stake holders.
- Contributing to the developmental needs of the customers in the backdrop of changing external environment.
- Enhancing ACMA's capabilities and competence portfolio commensurate with emerging industry needs and expectations.
- ACMA is committed to comply with the requirements of the Quality Management System and to continually improve its effectiveness through employee involvement.

President

Director General

EXECUTION

The association executes its activities through a network of regional set ups, national committees and specialised divisions like ACT and YBLF. Broadly the spectrum of activities can be categorised under four segments of operations:

Brand Building and Business Development: This is done with a focus of enhancing the appeal of the Indian auto-component industry as a whole and also providing platforms and opportunities for individual companies within the industry to promote themselves. Activities are done both within the country and abroad.

Government Affairs and Policy Advocacy: As the apex industry body representing the auto-component industry in India, a primary goal of the association is to create a conducive policy environment that helps the industry flourish given periodically evolving external conditions. It also assists the government in evolving appropriate policies and regulatory mechanism pertinent to the industry and the manufacturing sector in India.

Enhancing Internal Efficiencies: While promoting the

larger interests of the industry, the association plays a critical role in promoting latest technology and practices amongst its members to make the individual companies geared to meet global standards and be competitive. The ACMA Centre of Technology (ACT) through its highly successful Cluster Programs has been engaged in industry transformation for the past three decades.

Thought Leadership, Knowledge Initiatives and Competitions: Through seminars and events, the association develops a knowledge pool for members and creates a platform for members to continuously advance through participation in competitions. ACMA engages and works closely with leading global consulting firms to help the industry stay abreast of the latest industry and technology trends.

Driven by the zeal of achieving the vision of Automotive Mission Plan 2016-26, ACMA continues to work through its regions and committees to promote the interests of the industry. The regions and individual committees have specific objectives and scope, which are highlighted in a separate chapter and defines the specific domain of activities. Through this network, the association carries out a gamut of activities, which are broadly classified under the four domains discussed above.

OFFICE BEARERS



President

Mr. Rattan Kapur

Chairman & Managing Director
Mark Exhaust Systems Ltd.



Vice President

Mr. Nirmal K Minda

Chairman and Managing Director
Minda Industries Ltd.

Regional Chairpersons



Northern Region

Mr. Sunil Arora

Managing Director
Abilities India Pistons
& Rings Ltd.



Southern Region

Mr. A Venkataramani

Director
India Pistons Ltd.



Western Region

Mr. Piyush I. Tamboli

Chairman &
Managing Director
Investment and Precision
Castings Ltd.



Eastern Region

Mr. Killol Kamani

Managing Director
Samarth Engineering
Co. Pvt Ltd.

WHAT WE DO?

GOVERNMENT AFFAIRS AND POLICY ADVOCACY:

Continuously engage with the Government and related bodies to create a regulatory environment best suited for the Indian auto component Industry.

BRAND BUILDING AND BUSINESS DEVELOPMENT:

Promote brand India globally and assist Indian companies in getting market abroad and domestically. Assistance is also provided in developing network.

ACMA

THOUGHT LEADERSHIP, AND KNOWLEDGE INITIATIVES:

Creates and develops knowledge base for understanding market dynamics, technology trends, export opportunities and more.

ENHANCING INTERNAL EFFICIENCIES:

Training and sharing of globally acknowledged best practices for the collective benefit of companies in the industry. Also assist in optimising IT infrastructure for competitiveness.

MARQUEE EVENTS

FIFTY SIXTH ANNUAL SESSION AND NATIONAL CONFERENCE NEW DELHI (AUGUST-2016) - WINNING WITH QUALITY & INNOVATION



ACMA, the apex body of the Auto Component Industry in India hosted its 56th Annual Session and National Conference on 30 August 2016 at Delhi. The Annual Session was addressed by key ministers and eminent leaders from the automotive industry, which included Mr Anant Geete, Honorable Union Minister for Heavy Industries and Public Enterprises, Government of India; Mr Nitin Gadkari, Honorable Union Minister for Road Transport and Highways, Government of India; Mr R C Bhargava, Chairman, Maruti Suzuki India; Mr Guenter Butschek, Chief Executive Officer and Managing Director, Tata Motors; Dr Naushad Forbes, President and Co-Chairman, Forbes Marshall; Mr Vinod K Dasan, President, SIAM and Managing Director, Ashok Leyland and Mr Arvind Balaji, President, ACMA and Joint Managing Director, Lucas-TVS; Rattan Kapur, Vice President, ACMA and Chairman and Managing Director, Mark Exhaust Systems Ltd.

At the event, ACMA's keynote study conducted by McKinsey and Co. themed 'Winning with Quality and Innovation' was released by Mr. Anant Geete, Hon'ble Union Minister for Heavy Industries and Public Enterprises. The study reveals that the auto component industry, in order to stay competitive, will be required to develop capabilities for in house design, harness frugal engineering and create product differentiation through innovations. A move towards product and process innovation and organisation wide culture of quality and innovation will be integral to this change.

The study highlighted that culture was the critical dimension of quality where 30% of quality outcomes are linked to it. Contrary to popular belief, a culture of quality can be created in all organizations regardless of age and size. However, culture shifts are not possible without leaderships' commitment to quality. The research also

shows that the auto supplier industry will evolve with the following emerging trends, which will benefit the industry:

- Electrification- 65% of global new passenger vehicles will be hybrid or electricity by 2030
- Connectivity - 50% vehicles will have integrated infotainment units by 2030
- Autonomous driving - 300 million lines of software code per vehicle by 2030
- Advanced manufacturing - 20% reduction in cost of poor quality over 10 years driven by precision manufacturing
- Emissions - Tightening regulations will drive efficient powertrains
- Electronics - 45% of car value will be electronics by 2030
- Advanced materials- 60% share of lightweight materials by 2030

The conference concluded on a high note with 1200 participants. Eminent speakers from industry and government graced the event including Mr Girish Shankar, Secretary, Department of Heavy Industry, Government of India; Mr Rajan Wadhwa, President and Chief Executive Truck and Powertrain, Head - Mahindra Research Valley, Mahindra and Mahindra; Mr C V Raman, Executive Director (Engineering), Maruti Suzuki India. Dr Christian Brenneke, Vice- President - Product Engineering, WABCO Inc. and Mr Malo Le Masson Head - Global Product Planning, Hero MotoCorp and Mr David Keeling, Senior Partner McKinsey and Company, India and Mr. Shivanshu Gupta, partner, McKinsey and Company, who alluded to the steps that the component industry requires to take in order to become the preferred suppliers of choice for OEM's, create greater value proposition and transform from being local players to truly global players, thus becoming integral to the global automotive supply chains

ACMA

Automotive Component Manufacturers Association of India

56th Annual Session

WINNING WITH QUALITY & INNOVATION



ACMA AWARD WINNERS 2016



FIRST ACMA AFTERMARKET EXPO - NORTH EAST (NOVEMBER 2016)



The expo, organised at the Maniram Diwan Trade Centre Guwahati, was under the aegis of Ministry of Heavy Industries and Public Enterprises, Government of India, supported by the Guwahati Motor Parts Traders Association (GMTA) and the Federation of All India Automobile Spare Part Dealers' Association (FAIASPDA).

An estimated 155 automobile dealers; 2,000 auto component retailers and 1800 repair workshops or garages are concentrated in the North-East region in cities such as Guwahati, Jorhat, Silchar, Tinsukhia, Tezpur, Shillong, Dimapur, Kohima, Imphal, Aizawl, Itanagar, Agartala and Gangtok.

Speaking on the occasion, Chief Guest, Hon'ble Governor of

Assam, Banwarilal Purohil said, "The 1st ACMA Aftermarket Expo - North East is a unique international event that will foster economic development of the North East region. The region offers several incentives for manufacturing and with establishment of several engineering colleges, could be ideal destination for automotive manufacturing.

Rattan Kapur, President, ACMA expressing satisfaction on the successful culmination of the expo said, "I am glad to mention that the 1st edition of ACMA Aftermarket Expo has received an overwhelming response. Eighty leading auto component manufacturers displayed their products while over a thousand dealers and distributors from across the country including several from Nepal and Bangladesh attend the expo".





ACMA AUTOMECHANIKA NEW DELHI BREAKS RECORD (FEBRUARY 2017)



India's leading aftermarket exhibition, ACMA Automechanika New Delhi successfully reinforced its position as a reliable sourcing and networking platform for Indian auto-components and the aftermarket. The exhibition hosted 552 exhibiting companies from 17 countries showcasing the latest trends in aftermarket and facilitated serious business discussions over the four days. Since its debut in 2013, ACMA Automechanika New Delhi has grown constantly in both quantity and quality. This year the fair marked a 28% increase in exhibitors and 25% rise in exhibition space since 2015.

A total of 15,150 business visitors from India and abroad visited the show, setting a new benchmark with 17% increase in the number of visitors this year.

This biennial event, apart from being a showcase of innovations, offered an effective trade platform to wholesalers, distributors, traders and component manufacturers for future synergies and partnerships. On display were the latest advancements and solutions in the fields of parts, systems, tuning, workshop equipment,

bodywork & paintwork, car wash, IT & management and the automobile services.

This year international participation increased by 40% in comparison to last edition of ACMA Automechanika New Delhi in 2015. There were six dedicated international pavilions from China, Germany, Korea, Singapore, Taiwan and the United Kingdom besides individual exhibitors from Hong Kong, Indonesia, Italy, Japan, Malaysia, Poland, Russia, Thailand, UAE and the USA.

With an aim to address the rising concerns on counterfeit products sold in the replacement market and spread awareness on road safety, ACMA for the first time also set up a unique safety pavilion titled 'ACMA Safer Drives'. This initiative on road safety and usage of genuine components allowed exhibitors and visitors to evaluate parts and components and to make well-informed procurement decisions. The opportunity was also utilised for sensitising the visitors towards abiding road safety rules and usage of genuine auto parts.





ACMA IN PRESS

EXCLUSIVE
Rattan Kapur
 The president of the Automotive Component Manufacturers Association of India and CMD of Mark Exhaust Systems on plans to enable Tier 2 and 3 vendors to upgrade their skills and technologies, why Indian industry needs to develop its own IP and build scale, and how engaging with global institutes can sharpen the focus on R&D. An interview by Shobha Mathur.




ACMA To Scale Up In Tune With OEMs For \$200 Bn Production

The Automotive Component Manufacturers Association of India (ACMA) as its apex body representing the interest of the Indian Auto Component Industry is membership of over 700 manufacturers contributed more than 60 per cent of the auto component industry's turnover in the regional sector. ACMA's charter is to develop a globally competitive Indian Auto Component Industry and strengthen its role in national economic development as also promote business through international relations. "We are looking at five million passenger vehicles by 2020 up from 2.5 million today. In the Automotive Market of India (AMI) that we have just set up with the Government and as its CEO, we are looking at going to USD 200 billion as passenger vehicles up to about 15 million." **Rattan Kapur**, President ACMA, told *The Hindu* at *AutoParto Asia* in an exclusive interview. *The Hindu*

Get your share of the current scenario of automotive industry in India? At the automotive industry is trying a comeback engine for the recovery. The component industry alone contributes about 40% of the GDP. The industry's current turnover is around USD 50 billion. The industry is trying to create employment opportunities for additional 25 million people. The target for 2020, the whole automotive industry will create employment opportunities for additional 25 million people.

ACMA participation in Automechanika Frankfurt fully rewarded

The 120th edition of the auto component industry, IACM current reports estimated at \$11.2 billion, is expected to grow to \$200 billion by 2020, while the aftermarket is expected to reach from \$1.5 billion to \$11 billion.



ACMA Study on Indian Automotive Aftermarket: The Road Ahead

The Indian automotive aftermarket stood at Rs 56,098 crore (USD \$ 8.17 billion) with a total vehicle parc of 228.7 million across the country. The aftermarket is expected to reach Rs. 75,705 Crore (USD 13 billion) by 2019-20



ACMA Automechanika New Delhi scales new heights, sees over 500 exhibitors from 17 countries

AUTOGAR professional
 Essential reading for the Automotive Industry



ACMA's iAutoConnect meet clicks with buyers and sellers

By Shobha Mathur
 An ACMA initiative to bring together overseas buyers and 'connect' them with Indian component players has paid off handsomely. The first reverse buyer-seller meet in 2016, which was held in Gurgaon, saw more than 100 overseas buyers and 100 Indian component manufacturers. The first reverse buyer-seller meet in 2016, which was held in Gurgaon, saw more than 100 overseas buyers and 100 Indian component manufacturers.



ACMA's iAutoConnect 2016 to boost component exports

ACMA in its study of the global aftermarket, and we are pleased that iAutoConnect is a follow through to the study".
 Mr. Rattan Kapur, ACMA President, said, "ACMA has recently conducted a detailed analysis of twenty countries spanning Africa, Latin America and the CIS region, for aftermarket across the segments of passenger cars, commercial vehicles, two-wheelers, three-wheelers and tractors. The estimated aftermarket opportunity in these identified countries is around \$41.5 billion. It is against this backdrop that ACMA has organized this first ever iAutoConnect 2016 to present to the Indian companies buyers from the potential identified aftermarkets."



Auto aftermarket to grow at 10%: ACMA

ENS ECONOMIC BUREAU
 @ Chennai

THE Indian automotive aftermarket to grow at 10%: ACMA

The remaining is split equally between IAM (independent after market) branded parts and U-parts (parts from unorganised segment). But, the past few years have also seen a drastic reduction in the number of counterfeit parts

With the objective of enhancing component exports globally, the Automotive Component Manufacturers Association (ACMA) recently organised the first-ever iAutoConnect 2016, an International Reverse Buyers-Sellers Meet, in Gurgaon, with the presence of the Union Minister of Commerce.

Indian Automotive Aftermarket Likely To Reach Rs 75k Crore: ACMA

The Indian automotive aftermarket stands at Rs. 56,098 crore in 2016-17, and is likely to reach Rs 75,705 crore by 2019-20, according to a research study conducted by Automotive Component Manufacturers Association of India (ACMA).

AUTOGAR professional
 Essential reading for the Automotive Industry

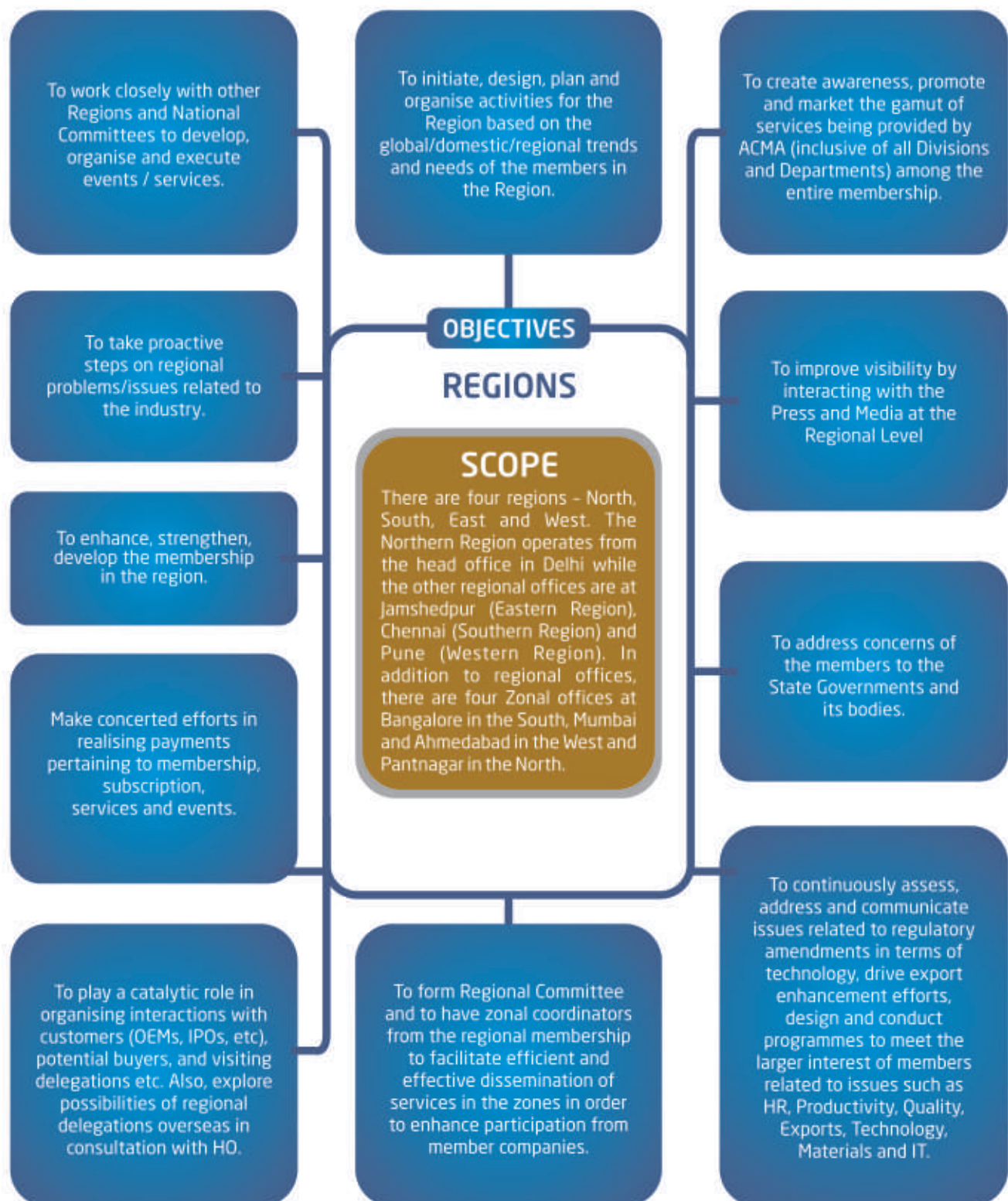


Mr. Vinod Mehta, Director General, ACMA



REGIONS & COMMITTEES: A SNAPSHOT

The various regional and national committees deliver ACMA's agenda. In this chapter, we provide a brief description of these committees highlighting their objectives and activity profile.



COMMITTEES OBJECTIVES AND SCOPE

 <p>ACMA CENTRE FOR TECHNOLOGY Mr. Srivats Ram Chairman</p> <p>Provides expert guidance to members in improving their manufacturing competitiveness, enhancing their quality capabilities and increasing productivity through various specific cluster programs.</p>	 <p>AEROSPACE, DEFENCE & RAILWAYS COMMITTEE Mr. F R Singhvi Chairman</p> <p>Supports ACMA members to understand and leverage opportunities in the adjacencies, especially with liberalisation in these sectors.</p>	 <p>CONSUMER AFFAIRS AND ANTI-COUNTERFEITING COMMITTEE Mr. Sriram Viji Chairman</p> <p>Addresses issues related to the aftermarket with a special focus on dealing with identification and prevention of counterfeiting.</p>
 <p>FINANCE COMMITTEE Mr. Harish Lakshman Chairman</p> <p>Ensures sound financial health of the association, makes appropriate recommendations to the Executive Committee regarding financial matters and ensures all statutory compliance.</p>	 <p>GLOBALISATION COMMITTEE Mr. Deep Kapuria Chairman</p> <p>Focuses on internationalisation of member companies by expanding linkages with global automotive leaders and manufacturers. It also supports exports development by facilitating participation of member companies in international trade fairs, organising international BSMs and tech shows. The committee is also engaged in dissemination of strategic information and knowledge on international automotive trade and best practices.</p>	 <p>HR, IR AND SKILL DEVELOPMENT COMMITTEE Mr. Nirmal Minda Chairman</p> <p>Recognising the present limitations of the industry and shortage of skilled manpower, the committee works specifically to address these challenges and devise appropriate solutions.</p>
 <p>INDIAN MACHINE TOOLS MANUFACTURERS' ASSOCIATION (IMTMA) INTERFACE COMMITTEE Mr. P Kaniappan Chairman</p> <p>Helps in identifying areas where the machine tool sector should focus to support and augment the competitiveness of the Indian Auto Component sector.</p>	 <p>INFORMATION TECHNOLOGY (IT) COMMITTEE Mr. Ravi Machani Chairman</p> <p>Facilitates adoption of digital solutions among ACMA members.</p>	 <p>KNOWLEDGE PARTNER ENGAGEMENT COMMITTEE Mr. A K Taneja Chairman</p> <p>Engages with Knowledge Partners to enrich the industry on various subjects and trends - local as well as global. It helps its members to strategize and navigate better in the dynamic business environment as well as harness newer business opportunities.</p>




MEMBERSHIP DEVELOPMENT COMMITTEE
Mr. Nirmal Minda
Chairman

The objective of the Committee is to elicit feedback from members so that ACMA services can be continually improved. The committee also engages in enhancement of ACMA membership base and revitalisation of dormant and inactive members.



MICRO, SMALL AND MEDIUM ENTERPRISES (MSME) COMMITTEE
Mr. JS Rangar
Chairman

Champion the cause of smaller companies in ACMA. Special programs and engagements are devised based on members' inputs to help the MSME sector.




OEM INTERFACE COMMITTEE
Mr. Rattan Kapur
Chairman

This formal mechanism of Interface with SIAM helps address areas of common concern between the OEMs and the Component Manufacturers.




PUBLIC POLICY AND GOVERNMENT AFFAIRS COMMITTEE
Mr. Rattan Kapur
Chairman

Facilitates proactive engagement of ACMA with the various Ministries and Departments of Government of India. This is ensured by participating on appropriate panels / committees/ councils / working groups of the government pertaining to Trade Policy and Promotion, WTO, Monetary & Fiscal Policy, Technology, and such issues that impact the auto component sector.



RAW MATERIALS COMMITTEE
Mr. Pravin Malhotra
Chairman

Interfaces with input raw material suppliers and helps members keep abreast with the raw material industry.



SUPPLY CHAIN/BSM COMMITTEE
Mr. Deepak Jain
Chairman

Helps address the basic hygiene factors of Quality, Cost and Delivery, especially for the tier 2s and tier 3s. It also helps strengthen the capacity and capability in the various stakeholders of the supply chain.




SUSTAINABLE DEVELOPMENT/ELECTRIC MOBILITY COMMITTEE
Mr. Sunjay Kapur
Chairman

Maintains a constant engagement with relevant authorities that define various aspects of sustainable development of auto-component players. The committee is also engaged in facilitating creation of ecosystem for electric mobility in the country.




TECHNOLOGY, SAFETY AND REGULATORY MATTERS COMMITTEE
Mr. Arvind Balaji
Chairman

Interfaces with the government on issues related to standards and regulations for the automotive industry.



YOUNG BUSINESS LEADERS' FORUM (YBLF)
Mr. Sanjay Labroo
Chief Mentor



Mr. Utkarsh Munot
National Coordinator

The forum is aimed at grooming the next generation of leadership in the auto component industry through an effective system of mentoring and giving them exposure to industry leadership in India and abroad.

HIGHLIGHTS OF ACTIVITIES

REGIONS

The major activities undertaken by various regions of ACMA during 2016-17 are given below:

EASTERN REGION

22 April, 2016: Workshop was conducted on Kaizen at Tata Cummins, Jamshedpur. This was attended by 35 delegates with a focus on making attendees understand the potential of their team members and optimize their strengths



9 May, 2016: Second workshop on kaizen was conducted at Jamshedpur. 32 delegates attended the workshop that focused on pareto charts, why-why analysis and fault tree analysis.



8 June, 2016: Thirty one teams from ACMA membership participated in the 4th Kaizen Competition. The Chief Guest was Mr. Sampat Kumar, CEO, TML Driveline and the guest of honour was MR. Akhilesh Kumar, Head, Project Sankalp,



Tata Motors. All the senior executives of Tata Motors were also present for the valedictory function.

10-11 June, 2016: Organized "Swavalamban 2016", a job fair in Sonari for students holding diploma in engineering. The objective was to provide job opportunity to the students and provide skilled workforce to the ACMA members. The job fair was organized in collaboration with Dayalbagh Educational Institute (DEI)- deemed university, Agra



9 July, 2016: Organised one day session on problem solving. The workshop was attended by thirty two delegates



10 August, 2016: Organized an interaction of IPO forum with Eastern Region members. There were ten member companies from the region and ten IPOs who participated in the interaction. During the inaugural speech Mr. Killol



Kamani, Chairman ACMA-ER said, 'Based on the feedback from buyers and learning from the 2014 IPO meet, this year we have made participation more intense. The focus is on companies who are ready and capable of long term commitment to serve the buyers'

24 August, 2016: One day session on "DR. JURAN'S

APPROACH OF QUALITY IM PROVEMENT" was held at Jamshedpur. The program was attended by 27 delegates was conducted by Mr . S.C Mishra, who presented Juran Trilogy



8 September, 2016: Conducted a training program on "IR strategy: How to maintain harmonious relationships in day-to-day working". The program was attended by 21 delegates.



10 September, 2016: Two day workshop on effective maintenance of CNC Machines towards zero down time with the objective of making the delegates understand the importance of preventive and break-down maintenance.

1-2 October, 2016: Organized one day training program on communication skills in Jamshedpur, to train the workforce to enhance their communication skills.



18 November, 2016: Organized one day workshop on supply chain management at Jamshedpur.



9 December, 2016: Conducted a training program on Advance Product Quality planning (APQP) at Centre for Excellence, Jamshedpur. The program was attended by 24 delegates



20 January, 2017: Organised a workshop on Conflict Management. The objective of the workshop was to identify and handle conflicts sensibly, fairly, and efficiently.



9-10 February, 2017: Conducted a two day awareness session on IATF-16949:2016 at the Centre for excellence, Jamshedpur. The objective of the program was to help the participants understand the new requirements of IATF1-6949:2016 standard and learn how to develop necessary documentation required for implementation.



NORTHERN REGION

12 April, 2016: Training program on 'cost of poor quality (COPQ)' was organized at Delhi NCR. Attendees were given in-depth training on tools, measurements and mechanisms to deal with COPQ, which is the aggregate impact of organization errors and defects on the Company.



21-23 April, 2016: Six Sigma Black Belt Certification Program (Level 1) - 16th Batch: Having successfully completed its 15 batches creating 255 black belt personnel out of 508 in ACMA membership, ACMA Northern region launched its 16th batch with the first module out of six. There were 15 participants.



29-30 April, 2016: In-house training program was conducted for member company - AAM, Uttarakhand on first aid in collaboration with the association of Indian Red Cross Society. A similar program was organized on 15 - 16 June, 2016, 28 - 29 March, 2017 & 30 - 31 March, 2017 at Tata Autocomp Systems Ltd, Rudrapur, Lumax Industries, Bawal & Daruhera facility respectively.



18 May, 2016: Training Program was undertaken on Preventive and Reliability Maintenance at Delhi NCR. Mr Ranjan Vashishta, ex DGM Maruti Suzuki, was the faculty and the programme covered all topics related cost of poor quality and focus on preventive maintenance to avoid such costs.



20 May, 2016: Second Zonal Quality Circle Competition was held at Rudrapur. A total of 23 teams participated in the competition where over 115 delegates attended.



The Jury comprised Mr Rajesh Jain, Head-Supplier Quality at Tata Motors Ltd; Mr Vishwadeepak Khandelwal, Sr Manager - TQM, Ashok Leyland and Mr Puneet Kapur, ex-DGM of Maruti Suzuki Ltd.

25 May, 2016: Northern Region Members visited Ford India Plant, Sanand - Gujarat: A delegation of 19 members visited the plant and gained insights into the best practices adopted at the plant. The visiting members got a first-hand exposure to the world class manufacturing and best practices adopted at Ford India.



27 and 28 May, 2016: Training was conducted on Lean Manufacturing at AAM India Manufacturing Corporation Private Limited, Rudrapur: The training focused on providing an opportunity to understand the fundamental principles of lean in manufacturing, reduce costs, eliminate waste and improve customer satisfaction.



31 May, 2016: Training program on new product development and product design at Delhi NCR. The objective of this programme was to understand the main stages of designing and manufacturing along with the concept of life cycle costing.



10 June, 2016: Train the Trainer programme was organised in New Delhi for its members. A similar program was organized at Tata Autocomp Systems Ltd from 15-16 June, 2016 in Uttrakhand zone.



16 June, 2016: Training programme on Cost of Poor Quality (COPQ). Mr. Ranjan Vasishtha, ex-DGM, Maruti Suzuki India and the founder of Quantum Jump Consultancy was the faculty for the training program.



17 June, 2016: One day training program on "Modern Techniques of Inventory Management" along with a visit to Sandhar Automotives, Gurgaon. The visit to the shop floor of Sandhar, showcased the efforts taken in critical areas such as moulding section, manual assembly and the injection moulding of the key making processes were shown



17 and 18 June, 2016: Organised an in-house training program for Imperial Auto Industries Ltd. Uttrakhand zone on Statistical Process Control.



1 July, 2016 : ACMA Northern Region organized the 13th QC Competition with 51 teams with more than 300 delegates.



25 July, 2016: Organised a National Conference on the Changing Trends in Automotive Supply Chain. The conference witnessed eminent dignitaries from leading automotive entities and various MSME companies sharing their valuable insights on the subject. The conference involved discussions on the impact of the technology and regulatory developments on emerging business models of vehicle manufacturers and auto component manufacturers. The Chief Guest for the occasion was Mr. R C Bhargava, Chairman, Maruti Suzuki India Ltd

28th July, 2016: An interaction with the Zonal level Government officials namely Mr. T. L. Satyaprakash-IAS, Deputy Commissioner Gurgaon, Commissioner Municipal Corporation Gurgaon; Mr. Amit Khatri-IAS, Additional Commissioner Municipal Corporation Gurgaon; Mr. Vinay Pratap Singh-IAS, Additional Deputy Commissioner Gurgaon; Mr. Vikram Kapoor, DCP (HQ); Ms. Dhaarna Yadav- IAS, ACP Crime against Woman and ACP Sadar and Mr. Ravinder Kumar, ACP Traffic, was organised in Manesar.



9 August, 2016: 11th National Quality Circle Competition at New Delhi. There were nine teams from pan India. The 3 member jury consisted of Mr. Dinesh Joshi, AGM - QA (Complete Vehicle Analysis) Volkswagen India Pvt. Ltd. Chakan, Pune; Mr. T R Narasimhan, Chairman of Southern Region of QCFI and Mr. Bijender Kaushik, Head of Assembly Mfg India Yamaha Motors Pvt. Ltd. and the Chief Guest Mr. Anupam Mohindroo, Sr. Vice President and Director, Honda Motorcycle and Scooter India Pvt. Ltd., addressed the event.



23 September, 2016: One day training program on "Line Balancing & VA/NVA Analysis". McKinsey Capability and Knowledge Centre has come out with an idea of providing a Virtual Model Factory, which is an innovative capability building instrument for lean operations through experiential learning in a 3D environment.

30 September, 2016: Training program for members of Delhi NCR zone, on "Personal Development- Art of Being You."

4-7 October, 2016: The April 2016 batch reached its concluding Module VI of 16th batch of six sigma black belt certification program. The faculty visited the shop-floors of the participating companies to validate the potency of the projects undertaken by them, which was followed by a project presentation by the participants on 6th October 2016. The final assessment of written examination was held on 7th October and the eligible participants were certified with the Black Belt Certification. After six months of training, 13 participants from 8 companies were certified as the Six Sigma Black Belts for successfully completing their final assessment exam and the validation of their projects.



14 October, 2016: Training program for members of Delhi NCR zone on Vendor Management - Auditing, Management and Upgradation.



18 November, 2016: Training program for members of Delhi NCR zone on Autonomous Maintenance. The objective of the program was to understand the concepts of TPM, role of employees and management in implementations.

28 November, 2016: ACMA Northern Region organised the 3rd Kaizen competition. 27 teams from Northern Region membership participated in the competition which witnessed over 50 delegates.



9 December, 2016: Training program on Behavioral Quality Improvement for members of Delhi NCR zone. The Behavioural Quality Improvement process is the systematic application of the behavioural approach to quality problems and quality improvement.



23 December, 2016: Training program on Measurement System Analysis at Lumax DK AutoInd Ltd, SIDCUL, Pantnagar was organised for its members of Uttarakhand zone. Measurement System Analysis (MSA) is a tool that helps to understand measurement systems, its variance and errors, enabling the process owners to decide the correct system to ensure right measurements and avoid any wrong judgements.



23 December, 2017: A workshop on manufacturing execution systems was organised as a part of industry 4.0 initiative along with a visit to the shop floor of Hella India Automotive Pvt Lt. to provide real-time exposure to the participants.



12 and 13 January, 2017: As part of Ministry of Road Transport and Highways, Road Safety Week, ACMA Northern Region participated in the campaign by organising a road show 'ACMA Safer Drives' in the Uttarakhand Zone, with the association of ACMA Uttarakhand members and Police. The major attraction in the roadshow was the safety pledge undertaken for road safety, where more than 200 people registered their names and mobile numbers in the manuscript



19 - 20 January, 2017: ACMA (NR) launched its 1st batch of training on Theory of Constraints. Theory of Constraints is used to understand and manage the material world of human-based systems including the lives of individuals and organizations.



24 January, 2017: An interaction of members was organised with Mr. Rattan Kapur, President and Mr. Nirmal K Minda, Vice President, ACMA in New Delhi where upcoming opportunities and challenges for the industry was discussed



31 January, 2017: One Day Training Program on Flexibility Manufacturing System (FMS) for its members of Delhi NCR zone. The course emphasised Flexibility Manufacturing System as a methodology to improve the Production Process and also provide a buffer for last minute changes as well as flexibility for planned changes to quantity, parts



type, or order of processes. The faculty, shared many case study presentations enabling the participants to understand the framework and ably guided them during the question and answer sessions

9 February, 2017: Training program on Inventory and Store Management for members of Uttarakhand zone, at Lumax DK Auto Industries Ltd., SIDCUL, Pantnagar.



7 February, 2017: A training program on Productivity and VAPCO enhancement through Waste Elimination for members of Delhi NCR zone. The training session on Productivity and VAPCO Enhancement through Waste Elimination aims to equip participants with the knowledge and understanding to implement and in order to eliminate the waste and reduce cost, thereby optimizing flow across all value chain processes.

11 February, 2017: The annual Single Minute exchange of dyes SMED competition, at New Delhi. Ten companies participated in the competition. SMED is an approach developed in Japan by San Shigeo Shingo, which has proved its effectiveness in many companies, by reducing changeover times from hours to minutes.



24 February, 2017: Training program on "Art of Effective Communication" at the Gurgaon plant of Meenakshi Polymers Pvt.ltd. The objective of the program was to improve the efficacy of everyday communication at the workplace, identify attributes of effective communication (Verbal, non-verbal) and the effect of same in the overall communication, giving and receiving feedback.



27 February, 2017: Organised a training program on Geometric Dimensioning and Tolerancing (GD&T)(Based on ASMEY14.5:2009) for its members of Uttarakhand zone at Endurance Technologies Limited, SIDCUL Pantnagar.



28 February, 2017: Training program on Performance Monitoring and Balance Score Card for its members of Delhi NCR zone. A similar program was organised at Meenakshi Polymers Pvt. Ltd on 18 March 2017 for its work-force at Gurgaon plant



7 March, 2017: A training program on Motivation in Manufacturing for its members of Delhi NCR zone. The seminar showed a number of case studies, motivational videos enabling the participants to understand the framework and ably guided them during the question-answer sessions



8 March, 2017: A training program for its members of Uttarakhand zone, on Total Productive Maintenance (TPM) at Roop Polymers Ltd SIDCUL, Pantnagar. TPM is fundamental of Lean transformation because it cultivates a manufacturing environment of sustainability, reliability and capability. TPM focuses on keeping all equipment in good working condition to avoid breakdowns and delays in manufacturing processes.



18 March, 2017: Organised a training program on Performance Monitoring and Balance Score Card for the work-force, at Meenakshi Polymers Pvt. Ltd., Gurgaon. The training session on Balance Score Card aims to provide a more comprehensive view to managers by complementing financial measures with additional metrics that gauge performance in areas such as customer satisfaction and product innovation.

21 March, 2017: Training program on Cost of Poor Quality(COPQ) for DelhiNCR zone. The objective of this program was to understand the impact of measuring the cost of poor quality, identify the quality costs in an organization and understand the process for measuring the cost of quality.

23 March, 2017: ACMA Northern Region organised the 7th edition of Invitational Golf Tournament at Ambience Greens Golf Course, The Leela Ambience Hotel, Gurgaon. OEMs,



ACMA members, Senior Government officials, and eminent Golfers from pan India participated in the event. In all 36 Golfers played at the tournament.

27 March, 2017: A program was conducted on Process Failure Mode Effect Analysis (PFMEA) for its members of Uttarakhand zone, at Endurance Technoloiges Limited, SIDCUL, Pantnagar. The objective of this program was to identify failures in product or process design at the beginning to eliminate the cause and understand how to organize, plan and run an FMEA project.



SOUTHERN REGION

24 March, 2017: The sixth edition of the Annual Safety Convention of ACMA Southern Region was held at Borgwarner Cooling Systems India Pvt Ltd, Chennai. Borgwarner Cooling Systems India Pvt Ltd hosted the Annual Safety Convention. Mr. Sivakumar, Sales Lead covered issues with a detailed presentation.

13 April, 2016: Organised a workshop on "APQP-PPAP for better Implementation" at ACMA office, Chennai. The faculty for the program was Mr P S Satish, M .Tech with 30 years of industry experience



21 April, 2016: Workshop on Manufacturing Cost Estimation and Cost Control at Pricol Ltd, Coimbatore. 12 delegates from 4 companies participated.



4-6 May, 2016: Organized the First Module of its fourth batch of Six Sigma Green Belt certification program at ACMA office. The faculty was Mr Viswanthan from World Class Manufacturing Solutions. The participants were introduced to the certification process.



20 May, 2016: First Round Table structuring industry academia platform was organized at Chennai. A four core member team comprising Mr Ram Venkatramani, Chairman, Mr P Kaniappan, Deputy Chairman, Mr V Thiagarajan, GM Wabco India and Dr Mahadevan, Director, India Piston Limited structured a possible engagement platform for such an endeavor



20-21 May, 2016: a two-day workshop on Geometric Dimensioning and Tolerancing (GD&T) was organised at ACMA office, Chennai. The program covered the need of Advanced Product Quality Planning (APQP) followed by the goals of APQP

21 May, 2016: Organized a workshop on Productivity Improvement through Elimination of Wastes at Roots Industries India Ltd, Coimbatore.



24 May, 2016: ACMA-SR-Karnataka and Hosur zone organised a workshop on Smart Working Culture for members.



17 June, 2016: First Core Committee meeting - Skill Olympics at Toyota, Bangalore. The genesis of Skill Olympics was raised during a visit to HMSI. A need was felt to organise skill Olympics for ACMA members. A core committee was formed and it was decided to invite the CEOs to take their views and suggestions to formulate this idea.



17 June, 2016: A one-day workshop on Customer Care Relationships at Chennai. The program was conceived with the objective of understanding the importance of customer care, how to deal with customer requirement and expectations and importance of building relationship and trust with customers.



24 June, 2016: Organised a program on Best practices for energy conservation and energy management at Turbo Energy Pvt Limited including visit to the facilities to witness implementation of EM and EC practices. Excellent case studies implemented at various companies like Wheels India, Sona Kayo, TVS Motors, Ashok Leyland were showcased to the participants



7-8 July, 2016: The Second Module of its fourth batch of Six Sigma Green Belt Certification program was organized at ACMA office in Chennai. The program was attended by 11 delegates from 6 companies.



12 July, 2016: Special Program on machine maintenance controllers by FANUC. Program on Electrical and Control Systems covered topics on maintenance and troubleshoot on CNC Machines, This programme was specially designed, where experts from FANUC trained participants on actual machines that is being used by companies.



16 July, 2016: The 11th edition of ACMA Southern Region's Quality Circle Competition saw a record breaking number of 70 teams participating at Chennai. The competition saw four parallel streams, which was adjudicated by eminent jury members from OEM. Mr S Vaithilingam, General Manager - Quality Control, Hyundai Motor India Ltd and the Chief of Jury for the competition during the valedictory ceremony, complimented the participants for the enthusiasm, energy and for sharing knowledge and their experiences. Mr Ganesh Mani, Vice President, Hyundai Motor India Ltd, Chief Guest for the event appreciated all the participants. He motivated the teams and complimented them for the way they have shown positivity in the competition.



20 July, 2016: Best practices on energy conservation and energy management, visit to Bosch Ltd. ACMA organised a programme on Energy Conservation and Energy Management at the facilities of Bosch Ltd. Bosch hosted the event and shared its best practices.



25 August, 2016: A training program was organised on Poka Yoke for ACMA member in Coimbatore at Pricol Ltd. The program saw the concepts and tools



30-31 August, 2016: Organized two day workshop on 8D at the ACMA office in Chennai for its members. The program was attended by 13 delegates from 4 companies.



30 August, 2016: ACMA Southern Region Karnataka and Hosur Zone organised one-day workshop on Kaizen Methodology and Poka-Yoke in Bangalore. The workshop focused on understanding of the origin, concept, levels and keys for application.



13 September, 2016: The Thailand Consulate in collaboration with the Thailand Board of investment organized a visit of the Thailand Delegation from Thailand's rubber and automotive tyre industries, who visited the ACMA office in Chennai. The objective was to promote linkage in trade and investment with Indian counterparts. The delegation was headed by Mr.Verapong Chaiper, Governor of Industrial Estate Authority of Thailand. A 21 member delegation included personnel from the Industrial Estate Authority of Thailand, Board of Investments, Consulate and 4 Industry personnel. Mr J Sridhar, Zonal Co-ordinator, ACMA Chennai and CEO, Maga Engineering Tech Pvt. Ltd., welcomed the visiting delegates and made a presentation on Automotive Industry in India.



5 September, 2016: ACMA along with the Bosch Training Center in Bangalore organized a training program on Hydraulics.



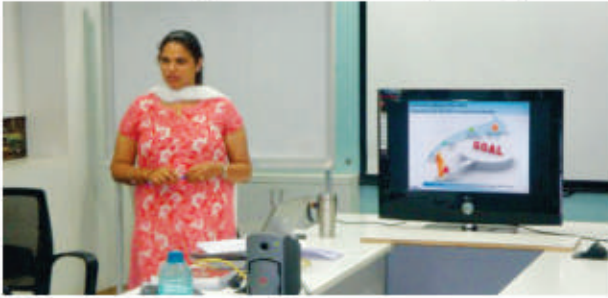
20 September, 2016: A delegation led by the Sri Lanka Export Development Board along with the Deputy High Commission of Sri Lanka visited ACMA Southern Region. The objective of the delegation was to seek avenues to promote Sri Lankan electronics products particularly in the South Indian market. The delegation was led by Mr Yasantha De Silva Yaddahi, Counsellor (Commercial), Sri Lanka Deputy High Commission and Mr Akila Zoysa, Assistant Director, Export Development Board of Sri Lanka.
22-23 September 2016: Organized Statistical Process Control (SPC) program in Tamil for the members on Statistical process control (SPC). 19 delegates from 4 companies participated in this program and cited many implementable ideas in the form of feedback. A similar program was organised on 21 -22 October 2016 in Tamil Nadu with 20 delegates from 4 companies.



26 September, 2016: Organized a program on 7 QC Tools for the members in Puducherry at the facilities of Lucas-TVS Ltd, Puducherry.



5-6 October, 2016: HR Connect - a networking and brainstorming session with HR managers was organised at ACMA office in Bangalore and Chennai respectively



2-3 November, 2016: Along with the support of the IPO Forum and the Ministry of Commerce, Government of India organised a four day workshop spread over two months on Enhancing Export Capabilities through Project Management at Chennai. 15 delegates from 10 companies attended this program.

9 November, 2016: Organized a Supervisory Development program for its members at ACMA office, Chennai. The objective of this program was to train communication skills, behavioural aspects and supervisory skills and work ethics.
14 November 2016: Visit to Oragadarn plant of Royal Enfield near Chennai. The visiting dignitaries were also given the opportunity to interact with the Senior Management of the company. Mr. Ram Venkataramani, Chairman, Southern Region, led the 20 member ACMA delegation

16 November, 2016: Organized a workshop on Supervisory Development for K & H members in Bangalore.
17-18 November 2016: Training on Statistical Process Control (SPC) in Tamil saw the 3rd Batch launch 21 members from 7 member companies participated in this program.



19 November, 2016: Given the importance for industry 10 initiative to work closely with engineering institutions a proactive engagement process was initiated amongst stakeholders. A directory was formally launched by Mr. Hemant Sikka, Executive Vice President and Chief Purchase Officer - Automotive and Farm Sector and Senior Commercial Vehicle Team, Mahindra and Mahindra, at the ACMA Executive Committee meeting in Pune.

25 November, 2016: Interactive session was organized with Port Customs officials and a visit to Adani port, Kattupalli, near Chennai. The session was organized at the facilities of Adani Port where Mr Ram Kumar, Deputy General Manager, Marketing welcomed ACMA members and

gave a brief overview of the company and its facilities in Chennai



26 November, 2016: A quiz program on Total Quality Management (TQM) at Chennai was organised, 25 teams from 14 companies participated in the program.



28 November, 2016: Government of Tamil Nadu MSME Department as part of its regular General Manager's Conference in Chennai, for the first time included an exclusive session with sector specific association -ACMA. The Conference was chaired by Mr. Ambuj Sharma, IAS. Additional Chief Secretary to the Government, Industries Commissioner and Director of Industries and Commerce, Government of Tamil Nadu

1-2 December, 2016: Organized the phase 2 of the certificate program on enhancing export capabilities through project management. 14 delegates from 9 companies participated in the Phase 2 of the certificate program.

5 December, 2016: Training program on Lean Management Practices at Bimetal Bearings Limited for its members in Coimbatore. 12 delegates from 5 companies attended this program, which provided insights to improve process by the elimination of waste.

10 December, 2016: 8th Kaizen Contest of ACMA Southern Region was held at Bangalore. The contest showcased breakthrough Kaizens done in various companies by the junior and middle management of ACMA member companies in the areas of Quality, Cost, Delivery, Productivity and Safety. 59 Kaizens from 25 companies were presented during the day, which included 1 team from an SSI member company, and had 20 delegates. Ms Anuradha Dhamodharan who donned the hat of Chief of

Jury, addressing the participants spoke about the key strategic position of the Auto Sector in terms of contribution to GDP and employment



28 December, 2016: A one day workshop on value engineering - A Way to enhance competitiveness was organised for ACMA members in Bangalore. This workshop aimed at giving an understanding on how customer perceives value and learn on the analysis of functions and applications of VANE Techniques.



24 January, 2017: Organized the 2nd edition of the Annual Convention on Safety in Coimbatore. The convention witnessed safety presentations and experiences sharing on plant and machinery safety electrical & fire safety and behavioral safety.



25 January, 2017: Conference on Changing Dynamics of Exports held in Chennai. The conference touched upon key elements and the drawbacks that exist in the auto component sector, which needs to be plugged. Making the keynote presentation at the conference Mr.Hans-Otto Heijne, purchasing Director, Scania CV India Pvt.Ltd, mentioned that since end customers/consumers are becoming demanding, as manufacturers the industry has to respond and service the requirements



18 February, 2017: 1st Poka Yoke Competition and 6th SMED Competition at Radha Regent, Chennai. 21 Poka Yoke Teams and 11 MED teams took part in the competition. UNIDO ACMA and Mr D Sekar, Counsellor-UNIDOACMA. Over 100 participants including the contestants participated in the day long event



21 February, 2017: A one-day training on "Effective Negotiations" was organised in Bangalore to help the participants understand challenges and proven techniques of negotiation to apply in day-to-day business.



24 February, 2017: Visit to Hanon Automotive Systems India Pvt Ltd and IP Rings Ltd to understand the best practices followed in the companies. Mr Prabhu, Director and Plant Manager, Hanon Automotive Systems India Pvt Ltd, interacted with the delegation and shared some of the best practices which included energy conservation. IP Rings Ltd showcased WSM (Work Space Management).



24 March, 2017: The sixth edition of the Annual Safety Convention of ACMA Southern Region was held at Borgwarner Cooling Systems India Pvt Ltd Chennai.

WESTERN REGION

1-4 April, 2016: With the objective to impart the skill in optimizing process parameters to reduce Cycle time and cost without affecting product quality, a new shop floor improvement open house program on "Cycle time and Cost reduction through Process Parameter Optimization using Variable Search Methodology" was organised in Pune



19 April, 2016: A training programme on "Problem Solving Techniques- 8D" In Gujarati, Hindi and English was organised in Ahmedabad. The objective of the training was to help participants solve problems by finding real root causes and to take action that permanently removes the problem.



28 April, 2016: Second Zonal Kaizen competition was organised in Aurangabad. The event was held under 2 categories - engineer and non-engineer. A total of 34 teams participated.



5 May, 2016: Under the Companies Act, 2013, it is mandatory for all the companies (including unlisted and Private companies) to implement internal controls over financial reporting. To create awareness among the membership on the subject, a session on "Internal Financial Controls Over Financial Reporting under the

Companies Act, 2013" was organised at ACMA Pune office.

6 May, 2016: A workshop on Preventive and Reliability Maintenance was organised in Pune. The workshop was aimed for Supervisors/Officers and Managers from all departments.



12-13 May, 2016: With the objective to drive companies towards process driven manufacturing approach and improve over-all performance of an organisation, a two day workshop was organised on "Improving Operations Performance with World Class Manufacturing Techniques" at Ahmedabad.



13 May, 2016: A knowledge visit "Gyan Darshan" to HR Excellence Awards winning companies was organised at Bosch Limited, Nashik and Abhijeet Techno-Plast(I) Pvt Ltd, Nashik for sharing their success stories and HR best practices with the ACMA member companies.



20 May, 2016: Workshop on Increase Profitability through reducing Cost of Poor Quality (COPQ) "at ACMA Pune office. The workshop covered 1-10-100 rule that is used on the quality control process to quantify the "soft costs" of quality issues.



10-11 June, 2016: A two day workshop on New Product Development and Design was organised in Pune. The workshop was aimed for Senior Managers and Members from R&D, Product Design, Development Teams and Project managers in the organisation. 3



17 June, 2016: The 15th ACMA Western Region HR Forum Meeting was held at Sandhar Technologies Ltd, Pune. Mr Chandan Sengupta, Senior Vice President, Corporate - HR, Sandhar Technologies Pvt Ltd. shared his experience and views on "Employee Goal Setting". Around 30 HR professionals participated and appreciated the presentations.



20-21 June, 2016: A two day workshop on 'ISO 14001:2015 Environmental Management System (EMS) & BS 1800 1:2007 Occupational Health and Safety Management Systems(OHSAS)' was organised at Ahmedabad.

1-2 July, 2016: Two-Day workshop on Internal Auditor Training with ISO/FS 16949 Automotive Emphasis for members and non-members in the region was organised. The objective of this program, to understand the requirements of associated standards and verify its effective implementation in organization through internal audits



12 July, 2016: The 11th edition of Annual Regional Quality Circle competition was organised in Pune with 300 delegates attending and 60 teams participating in the competition. Eminent members from OEMs judged the competition. Mr. Piyush Tamboli, Co-Chairman, ACMA Western Region and Chairman & Managing Director,

Investment & Precision Casting Ltd emphasized on use of new technology and solutions to remain competitive in the world. Addressing the participants at the valedictory ceremony, the Chief Guest, Mr. Devjit Sarkar, Vice President - Sourcing, Supply Chain & Logistics, Mahindra & Mahindra (Truck & Bus division), emphasized on sustaining quality when production levels increase.



22 July, 2016: Training Program on "Advance 7 QC tools for Continuous Improvement" at Ahmedabad. With the objective to understand quality tools that promotes Cross Functional Team approach and systematic advancement towards problem identification. Over 16 delegates participated in the training program.



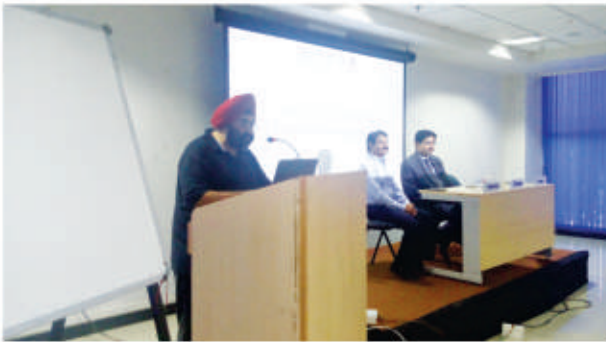
24 July, 2016: A two day training program on "MSA-measurement Analysis" was organised for Mungi Engineers Pvt ltd at their Chakan plant, Pune.



27-28 July, 2016: Organized Two Day Workshop on "Industrial Hydraulics and Pneumatics Basics" for its members and non-members in the region. The workshop was aimed for Engineers, Plant Managers and Supervisors from the projects. Mr. Harcharan Singh, Principal TechnicaConsultant and Industrial Trainer was the faculty
1-2 August 2016: Two day program on cycle time and cost reduction through process parameter optimization using variable search methodology for NRB Bearings Ltd at their plant in Waluj, Aurangabad



17 August, 2016: A one day training on "Time and Motion Study" was organised in Nashik. Over 42 delegates attended the training aimed for Plant Head, Production Department Head, Manufacturing Engineers/Managers/Executives, Production Managers/Executives and Improvement cell managers



16-17 August, 2016: Two day training program on Design of Experiment was organised in Ahmedabad. The objective was to optimize product design and improve manufacturing processes.



22 August, 2016: Organized awareness session on GST at Pune. The awareness session focused on overview of the GST and its concepts and, its implementation; challenges and opportunities for the auto-component industry. Mr. Nitin Shah, Expert- Indirect Tax and GST and member GST working group formed by the Commissioner of Sales Tax, Maharashtra, presented the overview of the GST and its concepts.



23 August, 2016: Organized knowledge visit "Gyan Darshan" to A Raymond Fasteners India Pvt. Ltd. and GKN Sinter Metals Pvt Ltd, both being ACMA HR Excellence Awards winning company in Pune. The objective of the visit was to understand the success stories from both the companies and HR bestpractices

29-30 August, 2016: Two day training program on "SPC - Statistical Process Control" at the plant of Mungi Engineers Pvt Ltd, Pune.



7 September, 2016: The 16th ACMA Western Region HR Forum Meeting was held at Bharat Forge Ltd, Chakan, Pune. The topics for the discussion included Role of HR professional in driving business strategy and GPTW (Great Place to Work).



17 September, 2016: The 4th Kaizen competition was organised in Gujarat. Overall 60 delegates attended the event with participation from all parts of Gujarat such as Gandhinagar, Bharuch, Vadodara, Sanand, Panchmahal, Wadhwan, Kachchh and Ahmedabad. The eminent panel of Jury included Mr. Nishant Saxena, Team Manager, Engine Assembly, Ford India Pvt. Ltd. Sanand Engine Plant, Ahmedabad and Mr. Manu Goyal, Head-Customer Quality, Tata Motors Ltd SanandPlant, Ahmedabad



21 September, 2016: A workshop on Balanced Score card was organised. The workshop was aimed for those who would like to install a Strategic Management System. Objective of this program was to help participants to understand the balanced scorecard.



22-23 September, 2016: Two day project management awareness training was organised in Pune. 25 delegates attended the training



15 October, 2016: A one day workshop on "Strategic Human Resource Management" was organised in Pune. The objective of the workshop was to develop a positive thinking process, explaining the benefits of Strategic Human Resource Management and help participants to ensure execution of post strategic HR changes to strengthen business planning.

17 October, 2016: A training program on Operational Leadership was organised in Ahmedabad. The workshop covered topics like essentials of effective leadership, performance management, problem identification, decision making, managing conflict and stress, communications and assertiveness.

20 October, 2016: Workshop on Low-Cost Automation in Pune. The workshop was aimed to training participants on importance of low cost automation and to understand the different types of low cost automation with practical guidelines to implement the same.

11-12 November, 2016: A Two-day's workshop on Value-Stream Mapping for members and non-members in Pune



20 November, 2016: The 4th edition of invitational golf tournament and networking dinner was organised in Oxford Golf and Country Club, Pune. OEMs, ACMA Members and eminent Golfers from various parts of India participated in the event. In all 72 Golfers played at the tournament.



10 December, 2016: The 2nd' Zonal Quality Circle Competition was organized in Gujarat. Ten leading component manufacturers participated in the event. The OE Customers were invited as jury to witness the problem solving ability of the component industry. Mr. Sandeep Deswal, Team Manager Manufacturing Engineering, Ford India Pvt. Ltd. and Mr. Anil Palhade, Head Supplier Quality, Tata Motors were part of jury panel at the competition.



20 December, 2016: Organised Kaizen Competition was organised in Pune, which saw 64 case study presentations on improvements carried by ACMA member companies in their respective plants in the Western Region



24 December, 2016: Workshop on Emotional Intelligence in Pune was conducted aimed for executives, managers, front line sales, maintenance, operational excellence and customers and personnel. The workshop was a classroom session coupled with tutorial sessions, group exercise and stimulation games

28-29 December, 2016: Two day workshop on APQP - Advanced Product Quality Planning for Mungi Engineers Pvt Ltd at Chakan, Pune. The topics covered in the workshop included APQP - Purpose and Benefits. Plan and Define Program. Process and Product Design and Development, Product and Process Validation, Feedback, Assessment and Corrective Action



9-10 January, 2017: Along with the support of International Purchasing Offices forum (IPO), ACMA conducted a workshop on Enhancing Exports through Effective Project Management. The workshop has two phases. The phase-1 was held at ACMA Pune office.

13 January, 2017: ACMA Western Region hosted its Annual HR Summit in Pune. The summit theme was "Business Excellence through People - Realizing the Make in India Dream". It was well attended by Academia, HR and IR professionals, industry leaders and decision makers. The speakers at the inaugural session included Padmashree Mrs. Lila Poonawalla, Chairperson Lila Poonawalla Foundation, Chief Guest for the Event, Dr. Aravind Chinchure, Chair Professor-Innovation and Entrepreneurship - Symbiosis International University, while Guest of Honour for the Event was Dr. Santosh Shave, Mentor, ACMA-HR,IR & Skill Development and Sr. Vice President- HR,IR & Adm in, Bharat Forge Ltd. and Mr. Piyush Munot. Co-Chairman ACMA Western Region and Director-KCTR Varsha Automotive Pvt Ltd.



18 January, 2017: An interaction and visit to "Gujarat locations (Ahmedabad-Emerging new auto hub)" was organized by ACMA Western Region in association with HR, IR & Skill Development Committee, ACMA. The visit was organized for the member companies to understand the growth potential of Gujarat and to know the upcoming locations, infrastructure in Gujarat for Automobile/Auto-component industry. 25 delegates from ACMA member-company comprising of CEO's, HR Professionals and Plant Heads from Northern, Western and Southern Region participated in the visit.



24 January, 2017: Organized training program on 'Strategic Implementation of Cost of Quality (COQ)' at Ahmedabad. The training was aimed for operation and quality managers and executives, TQM, six sigma and business excellence practitioners



18 February, 2017: Organized the 2nd edition of Best Practices Competition in Ahmedabad



20 February, 2017: One day workshop on 'Emotional Intelligence' was organised for Executives, Managers, Front line sales, Maintenance, Operational Excellence and Customer service personnel.

6-8 March, 2017: 17th ACMA Western Region HR Forum Meeting at Mahle Behr India at Chakan, Pune. At the meeting the latest amendment in contract labour abolition and regulation Act, 1970 and sharing of experience of wage agreement was discussed



8-9 March, 2017: In order to meet the growing need for trained professionals in the field of Trade finance, ACMA Western Region with support of Symbiosis Institute of Management Studies organized two day workshop on "Trade Finance" in Pune.



COMMITTEES ACTIVITIES

The major activities undertaken by various committees of ACMA during 2016-17 are given below:

Aerospace, Defence and Railways Committee

14 May, 2016: Indian Auto Component Industry - Make in India for Aerospace and Defence: Second ACMA Aerospace and Defence Summit



With India poised to become a large commercial and defence aircraft market and rising passenger traffic and increasing military and defence expenditures, the demand for aircrafts is expected to increase. The Govt is carrying out reforms in aviation policy, defence procurement to increase efficiency, inviting foreign players with excellent capabilities and encouraging domestic industry.

All these factors make the Indian defence and aerospace sector one of the most attractive markets globally and provides an immense opportunity for both domestic and foreign players. In this backdrop, the ACMA-ADR Committee organised the 2nd Aerospace and Defence Summit at Hotel Le Meridien, New Delhi.

Shri. Manohar Parrikar, Hon'ble Raksha Mantri, Ministry of Defence, was the Chief Guest for the summit along with other eminent speakers and experts namely Mr. F R Singhvi, Chairman - ACMA ADR Committee & Joint Managing Director Sansera Engg. Pvt. Ltd., Mr. Kishore Jayaraman - Rolls Royce, Mr. Ashish Saraf - Airbus, Maj. Gen. S Bhattacharya - Directorate General of EME, Indian Army, Mr. Jagmohan Singh - Lockheed Martin, Mr. Vineet Khunger - SAAB Technologies, Mr. Arvind Melligri - Aequs India. The experts shared their perspectives on how the auto component industry could gear-up for the aerospace and defence sector.



28-29 July, 2016: ACMA Aerospace Delegation to Bangalore

ACMA organised a reverse exhibition-cum-B2B meeting with UTC Aerospace Systems at their premises in Bengaluru, which was followed by a shop floor visit. ACMA also organized a one day plant visit and interaction with suppliers to aerospace companies namely International Aerospace Manufacturing Pvt. Ltd (IAMPI), and Sansera Engineering Pvt. Ltd. The objective of the interaction was to apprise members about the opportunities in the aerospace sector and also to give them an insight into the business dynamics of the sector.



Consumer Affairs Committee

20-22 January, 2017: Seminar on Preparing the Aftermarket for Digital Economy & Road Ahead

ACMA organised a national seminar on 'Preparing the Aftermarket for the Digital Economy', which focused on e-retailing and scope of mobile wallets within the auto component value chain. Recognising the need for reforming the aftermarket distribution channel through usage of digital tools, Sanjay Kumar Rakesh, Joint Secretary - Digital Payments, Ministry of Electronics and Information Technology, Government of India.



Around 100 ACMA members, dealers, distributors took part in the conference.

Globalisation Committee

5 February, 2016: Global Automotive Roundtable: Meeting of Counterpart Associations across the World



On the side-lines of the 13th Auto Expo Components show, a meeting was organised by ACMA of its counterpart MoU Partners. The meeting was organised with the intent of forging better ties across the industry value chain and also provide a networking platform for leaders from auto or auto component associations from across the globe. Associations of 8 countries participated.

4-6 May, 2016: Workshop on After-Market Opportunities and Market Dynamics in Latin America and Africa



ACMA appointed Frost and Sullivan as its knowledge partner to conduct a study on the potential opportunities in the Global Aftermarket. The study brought to light interesting nuances of each of these after-markets shedding light on the key opportunity segments, the current business trends and the key challenges to overcome. In order to dwell upon the latent opportunities in the emerging economies, ACMA organized a workshops where senior leadership from Frost & Sullivan (including their overseas team) presented the findings of their deep dive analysis on the select markets, followed by brainstorming sessions and group activities. The workshop was held in New Delhi on May 4, 2016 and in Chennai on May 6, 2016. The workshop saw participation from around 35 and 17 ACMA members in New Delhi and Chennai respectively

6-7 October, 2016: iAutoConnect 2016 - ACMA Reverse Buyer Sellers Meet



With the support of the Department of Commerce, Ministry of Commerce and Industry, Government of India, ACMA organised the first ever iAutoConnect 2016: ACMA Reverse Buyers Sellers Meet in Gurgaon. The meet had participation from over 145 international auto component aftermarket distributors from 45 countries such as Iran, Africa, Central and Eastern Europe (CEE), CIS, ASEAN, West Asia, Japan, and North America. The exhibits by over 80 Indian manufacturers gave the visiting international delegates an insight into the rapidly growing capabilities of the domestic Automotive Component Industry. The first day of the meet was dedicated for Business to Business meetings and networking opportunities, while the second day of the event was focused on plant visits elected by the visiting Buyers

21 October, 2016: Paccar, Suppliers Conference



The first such supplier conference was organised at Mumbai by Paccar. Senior leadership from North America, Europe and Australia participated to share their outlook, strategy and growth prospects. Over 20 select suppliers along with ACMA were invited to participate at this event.

3-4 February, 2017: 2nd New Delhi Automotive Summit



The summit themed, 'Synergising with global Supply Chains', was attended by eminent dignitaries like Mr Girish Shanker, Secretary, Ministry of Heavy Industry and Public Enterprises, Government of India as the Chief Guest. At the event, the World Bank Group presented results of a recent study conducted by them on the Indian auto-component



industry's competitive positioning in the global value chain. The Summit concluded with the various action points, which will bring new synergies in global supply chains industry for the overall growth of the auto-components sector in India. Automotive companies, both Indian and international, OEMs or component suppliers alike, have made their presence felt on the global stage. In addition, the conference involved discussions on Creating Global Value with Supply Chains and How Disruptive Technologies are shaping Value Chains of the Future. The event also outlined the current state of the industry and indicated the way forward as well as the opportunities that could exist for suppliers in the near future

HR, IR and Skill Development Committee

19 May, 2016: Visit to Sona Skill Development Centre

Northern Region HR Forum organized a visit to Sona Skill Development Centre (SSDC), Gurgaon with an objective to develop a framework of standards, curriculum and quality assurance in skill development, to support private sector in skill development and subsidize training cost through government subsidies act and to conduct research and



analysis, to establish skill gaps and develop modular courses.

27 July, 2016: Gyan Darshan, Visit to Ecocat India Private Limited



ACMA Northern Region and its HR Forum organized this visit to Ecocat (India) Pvt. Ltd., which is amongst the ACMA HR Award Winner. A total of 31 participants were part of this Northern Region HR Forum meeting.

IT Committee

AutoDx Update

The autoDX team met with GST Network to understand the role, effect and impact of GST on manufacturing when rolled-out. The team also wanted to explore opportunities to work together on the autoDX platform as GSTN is also working on similar platforms of data exchange with other industries

22 June, 2016: 9th Governance Committee Meeting - Auto DX at Bangalore

IBM presented the status update report and the members deliberated on how to accelerate the on boarding process. The Committee discussed on the Pricing as the IBM contract is nearing end of initial phase of licensing. The need was recognised to have more ACMA and SIAM members on board and set targets for themselves with regard to go-live. Mr K K Gandhi - Executive Director- SIAM attended this meeting and congratulated the Governance Committee for the efforts and progress in autoDX. He extended his full support to increase adoption and awareness of autoDX

Raw Material Committee

12-13 April, 2016: Plant Visit to Tata Steel



Tata Steel commissioned a new continuous annealing unit at their Jamshedpur plant. The company is also on an expansion mode through its Kalinganagar unit which has dedicated a major share for the automotive sector. To update the membership on these developments and also to discuss on procurement related matters, ACMA's Raw material committee organised a 13 member delegation to Tata Steel, Jamshedpur.

11 July, 2016: National Conclave on Foundry Best Practices



The Conclave was organised with an objective to provide an insight on the latest trends and technologies used in castings. Over 50 participants represented users of castings from Chennai, Hyderabad, Pune, Aurangabad, Baroda, Aligarh and Delhi NCR.

12 December, 2016: Visit to Hinduja Foundries

The 12 member ACMA delegation led by Mr Pravin Malhotra, Chairman Raw Material Committee visited the SIPCOT unit

of Hinduja, one of its latest state of the art plants. The delegation were taken on a tour of the castings unit, the machine shop, the tool management section, the pattern manufacturing shop and the core making unit with its Robotic lines. The delegation had an extensive interactive session with Team Hinduja, led by Dr Georg Roeth, Chief Operating Officer, Mr K Varatharajan, Plant Director and



colleagues from concerned departments

Supply Chain Committee

26 May, 2016: ACMA Buyers-Sellers Business Meet at Ahmedabad



A two-day buyer-seller meet was organised with the objective of enhancing business linkages in Gujarat and develop the automotive supply chain.

MSME Committee

9 December, 2016: Visit to Bajaj Auto, Minda Corporation and Technocrat Connectivity Systems



Sixteen ACMA member companies visited these facilities to understand the manufacturing and operational excellence adopted in the plants and the challenges faced. Mr. Saurabh Poddar, Co - Chariman, ACMA-MSME Committee led the delegation and facilitated the interaction with the visiting companies.

22 December, 2016: Interactive Session with Ernst and Young on GST



An interactive session was conducted to prepare the members for GST. Members got a chance to interact with Ms. Sarika Goel, Partner - Indirect Taxes, EY, India, experienced in advising clients on Indian indirect taxes, and is working extensively on GST projects

18 January, 2017: Half day workshop for founder of family managed businesses



Less than 30% of family managed companies successfully make the transition to the 2nd generation and less than 10% pass on the baton to the 3rd generation. With this background, ACMA MSME Committee organized a half day workshop for founders and promoters of family managed businesses to share an eight step plan to make this transition. Mr. J S Rangar Chairman - ACMA MSME Committee extended a warm welcome to the faculty members along with the delegates attending the workshop. The workshop was focused on 2 areas - Professionalism in Family businesses and Succession Planning and Next Generation Induction. In all 24 delegates participated in the workshop.

17 February, 2017: Sharing of Insights through multiple plant visits

The MSME Committee of ACMA organised plant visits to Volkswagen India and two ACMA member companies Gabriel India Ltd and Lumax Cornaglian AutoTechnologies Pvt Ltd. with the intent to provide an exposure to MSME companies to learn manufacturing and operational excellence from leading automotive companies. Mr. J S Rangar, Chairman, ACMA-MSME Committee led the 19



member delegation and facilitated the interaction with the visiting companies.

Sustainable Development Committee

2-4 February, 2017: International Green Mobility Expo 2017, Pragati Maidan, New Delhi



In continuation to ACMA's Sustainable Committee's effort to promote localisation of EV components, ACMA supported CII for the 2nd edition of International Green Mobility Expo and took around 216sq. mtrs area at a prime location for component suppliers to showcase their capabilities in green mobility. Ten component suppliers showcased components like E-Axle kit and E-mobility solutions, Electric Bus, Low Voltage Hybrid Solutions (48V), High Voltage Drive Systems, Boost Recuperation Machine, Start-Stop Systems, Lithium Battery Packs, BMS, Diagnostic Tool, Chargers, Fasteners, Quick connectors, Electrical cable channels, Connectors, Bonded fasteners, Housing, Cylinder head, Coolant Collector, Crankcase, Manifold, Lithium Packs and other EV Solutions.

Mr. Anant Geete, Union Minister for Heavy Industries and Public Enterprises, inaugurated GMX 2017 and visited the suppliers to see the readiness of the component industry to support FAME initiative of Government.

International Events

7-10 April, 2016: 7th Thailand Auto Parts & Accessories Fair (TAPA) 2016

ACMA with the support from Ministry of Commerce, Government of India participated at Bangkok International Trade and Exhibition, Centre (BITE), Thailand. TAPA 2016 was one of the largest auto parts and accessories trade fair in Thailand. The show featured 576 exhibitors from Thailand, Taiwan, India, China, Malaysia, South Korea and attracted over 5000 trade visitors over the fair days. Nine member companies of ACMA participated at the exhibition.



7-10th April, 2016: Automechanika, Istanbul



The Indian auto component industry reiterated its focus and commitment to the Turkish automotive sector through ACMA's joint stand participation at the Automechanika Show in Istanbul. Ten Indian companies comprising a mix of small, medium and large companies displayed their engineering and marketing capabilities at the show. The India Pavilion with the funding support from the Ministry of Commerce was located in Hall 6 that saw a continuous flow of visitors.

8-10th May, 2016: Automechanika, Dubai



The 15th edition of Automechanika Dubai 2016, featured 2,017 exhibitors from 58 countries and welcomed more than 30,000 trade visitors from across the globe. Organised by Messe Frankfurt Middle East, Automechanika Dubai featured 25 country pavilions, and 38 international trade associations, spanning 70,000 sqm across 15 halls. The event grew at 8% year-on-year in both exhibitor numbers and space. Looking at this growing potential, ACMA placed a joint stand at the show with the assistance from Ministry of Commerce, Government of India. The joint stand was located in Hall 2, with 56 ACMA member companies in a total display area of 500 sqm

17 June, 2016: MOU Signing with Korea Trade Centre (KOTRA)

Continuing with ACMA's endeavour to build linkages and strengthening mutual business co-operation, ACMA signed a MoU with Korea Trade Centre (KOTRA) adding to the list of more than 30 MoUs with counterpart associations across the globe. The MoU was signed by Mr Won Sok Yun,



Executive Vice President, KOTRA and Mr Vinnie Mehta, Director General, ACMA during the Korea-India infrastructure and industry forum 2016. Over 450 Indian businessmen and 150 Korean entrepreneurs met at the event in the presence of Honorable Mr Joo Hyunghwan, Minister for Trade, Industry and Energy of the Republic of Korea, Ms Nirmala Sitharaman, Minister of Commerce and Industry of India, and H E Mr Cho Hyun, ambassador of Korea to India.

27 June - 1 July, 2016: CEO's Mission to South Korea



The delegation of 16 member companies was led by Mr. Arvind Balaji, President (ACMA). The objective of the mission was:

- To explore opportunities for supplying to the South Korean OEMs
- To explore tie-ups, JVs, technical collaborations with Korean auto component manufacturers
- Understand the Korean vehicle manufacturers purchasing and sourcing strategy and their expectations of Indian suppliers.
- Learn best practices followed by the Korean Auto/Auto Component Industry

The delegation visited General Motors, Hyundai Motors, Hyundai Heavy Industry, Tata Daewoo and Mahindra Ssangyong and had meetings with heads of purchasing teams. The ACMA delegates also interacted with several tier 1 and 2 company representatives from the Korean automotive industry.

18-19 July, 2016: India Aftermarket Auto Show in Nigeria and Kenya



ACMA with the support of Ministry of Commerce and Industry in India, Indian High Commission in Nigeria and Kenya organized the first ever India After-Market Show, Buyers-Sellers Meet, along with after-market visit in Nigeria. Both the Indian High Commissioners from Kenya and Nigeria graced the occasion and extended the participating companies their full support of ease of doing business

26 July, 2016: Meeting with Automotive Components/Technology Delegation to Israel



ACMA with Economic and Trade Mission of Israel organised an interaction and Business to Business meetings with the visiting nine companies from Israel. The objective of the interaction was to build relationship through Joint Ventures/Technology/Transfer and create awareness about Israel automotive industry among ACMA members.

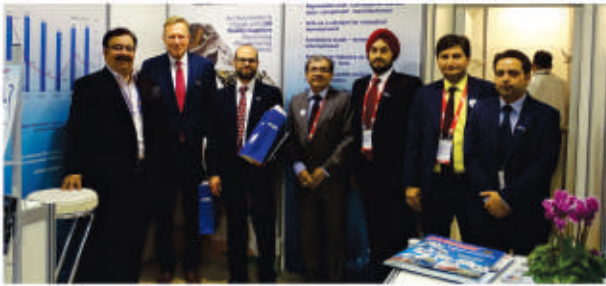
2-3 August, 2016: Buyers Seller Meet in Indonesia



With the support of Ministry of Commerce and Industry in India and the Indian High Commission in Jakarta, Indonesia, ACMA organized the 1st ever Buyers-Sellers Meet, which was preceded with an Aftermarket visit in Jakarta, Indonesia. The Buyers-Sellers meet was inaugurated by Ms N L Mukhopadhyay, Ambassador of India to Indonesia.

Fifteen ACMA member companies participated to showcase their products at the BSM. The exhibitors received an overwhelming response.

13-17 September, 2016: Automechanika, Frankfurt



The ACMA pavilion was spread across 686 square meters of prime space in Hall 6.2 with over 52 leading Indian auto component manufacturers showcasing aftermarket products. The central theme of the show was 'Tomorrow's Service and Mobility'. A record 4,820 exhibitors from 76 countries took part, including leading players from industry, workshops and retail, and they witnessed an impressive demonstration of the ways in which the industry is changing as connected cars come to the fore. The fair spotlights innovations and solutions in the fields of parts, systems and tuning, workshop equipment, bodywork and paintwork, car wash, IT and Management and the latest automobile services. Speaking on the occasion, Mr Rattan Kapur, President, ACMA said, "ACMA is proud to participate



at the most renowned and successful aftermarket trade fair to showcase technological prowess of the Indian auto component industry. Needless to say, this edition has further contributed in ensuring opportunities for business development and deepening the distribution chain"

22-29 September, 2016: IAA Hanover Commercial Vehicle Show



10 member companies participated in the event. During the event, the concept of digitalization was displayed as a strong concept of driver of innovation, connectivity and automation in commercial vehicles. This leads to reduction in fuel consumption and carbon emissions, enhancing safety through the connected electronic systems, which react immediately.

1-3 November, 2016: APEX 2016 at Las Vegas



ACMA participated at the AAPEX show 2016, USA with the support of Ministry of Commerce and Industries, Government of India. The ACMA Indian pavilion was spread across 1600sq. ft. with 14 member companies. Located at the majestic Sands Expo, AAPEX 2016 featured over 2,200 automotive after-market manufacturers and suppliers showcasing innovative products, services and technologies to over 44,000 targeted buyers. The show in particular provides a platform to generate business in the aftermarket. The ACMA- India stand was well appreciated by all the exhibitors, visitors and other dignitaries.

15-18 November, 2016: 11th International Auto-Parts Fair, Tehran, Iran



With the support from Ministry of Commerce, ACMA organized a group participation of ACMA members/companies at the recently concluded 11th Iran International Auto Parts Exhibition held at Tehran International Permanent Fair Ground. ACMA represented the India Pavilion in Hall 6 with 35 exhibitors spread over 400 Sq.mtrs. With an increase of 60% in space compared to last year, the ACMA Pavilion was 4th largest after China, Korea and Germany. The ACMA Pavilion was inaugurated by Excellency Shri Saurabh Kumar, Ambassador of India to Iran. Shri Rohit Vadhvana, Second Secretary (Commercial) also visited the India Pavilion. The business visitors at the exhibition were mainly from Iran and the Middle East.

30 November - 3 December, 2016: Automechanika, Shanghai



ACMA participation at the Automechanika Shanghai - the world's second largest Automechanika trade fair for automotive parts, accessories, equipment and services in Shanghai. The ACMA pavilion was spread across 142 square meters in Hall no.2 at National Exhibition and Convention Centre, Puxi, Shanghai and was supported by Ministry of Commerce. Twelve Indian companies comprising a mix of small, medium and large displayed their engineering and marketing capabilities. The India pavilion was visited by Mr. Prakash Gupta, Consul General, Consulate General of India, Shanghai. The enquiries generated were mainly from stockists, dealers and distributors.

20-25 February, 2017: Tech Expo with OEMs



ACMA organised the first ever Tech Expo with 3 global OEMs from Sweden and France, which was spread over 5 days. Supported by Ministry of Commerce, Government of India, the Tech Expo was organised with the support of companies like the Volvo group, Husqvarna and PSA Group. ACMA had also arranged an interaction of Indian participants with the senior purchasing team of Valeo on 23rd February 2017. The 32 member delegation from 29 Indian companies showcased the growing design and development capability of the industry by product display at the Volvo Technical Centre at Gothenburg, one of the leading OEMs of the world which in products like Cars, Buses, Trucks and Penta marine engines, on 20th & 21st February 2017, followed by Husqvarna on 22nd February 2017 and PSA on 24th February. The Indian Ambassador H. E. Ms. Monika Kapil Mohta inaugurated the Tech Expo along with Mr. Martin Liden, Vice President, Volvo group. The response from the OEMs was encouraging and overwhelming with few receiving RFQs and many received enquiries

6-9 March, 2017: CEOs Mission to USA

The delegation of 21 member companies was led by Mr. Rattan Kapur, President, ACMA. The broad objectives of the mission was to explore opportunities for enhancing business linkages with the US auto component industry, potential JVs and strategic alliances, provide an exposure to Indian auto component industry to new technologies, understand the US vehicle manufacturers' global outlook as also that for India; purchasing and sourcing strategy and their expectations from Indian Suppliers. Also to update the US Auto Industry on the growing opportunities and capabilities of the Indian auto component industry through a seminar/ networking event.

The ACMA CEOs' delegation met with senior management of Ford, Fiat Chrysler, Mahindra Technical Centre, ZF and Futuris. Apart from the traditional automotive industry, the ACMA delegation interacted with the procurement team of TESLA and visited their manufacturing facility at Palo Alto. That apart, to get a perspective on the automotive start-ups, the delegation met with Volta Charging, Deepscale and Shift Mobility. During the visit, ACMA along with its MoU Partner Original Equipment Suppliers Association (OESA) organized a seminar followed by end to end meeting with OESA's members. The seminar was well attended by over 30 component manufacturers from the US Auto Components Industry.



3-7 July, 2017: India Korea Auto Parts Partnership meet



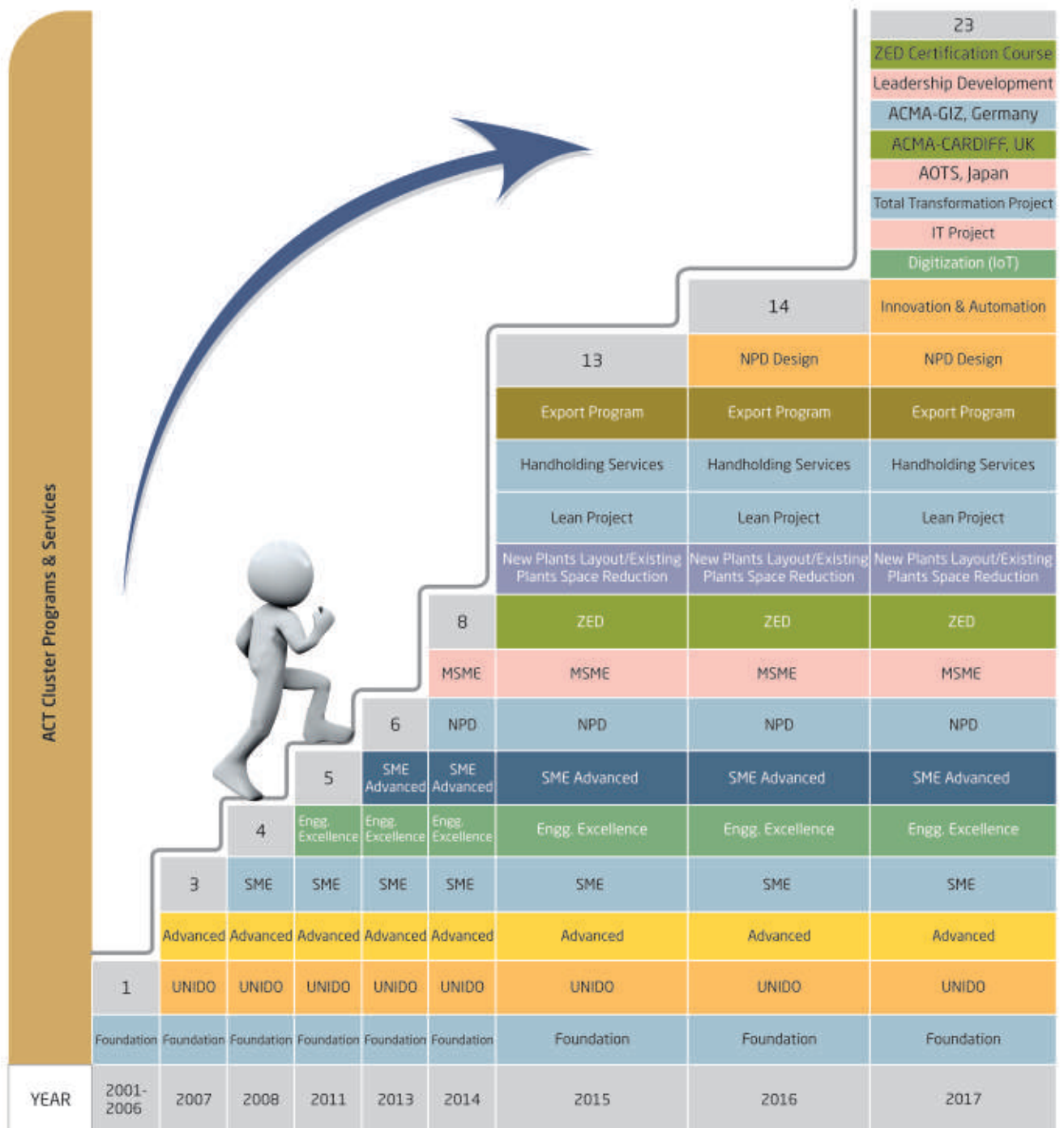
In July 2017, Mr Rattan Kapur President, ACMA 2016-17 led a highly successful India Korea Auto Parts Partnership meet with 40 delegates with an objective to foster strategic partnership, acquire/collaborate technology and explore global opportunities with OEMs, Tier I and Tier 2s. Over 200 Korean companies participated in the partnership meet to get a deeper understanding of the Indian technology on offer.

ACMA CENTRE FOR TECHNOLOGY (ACT)

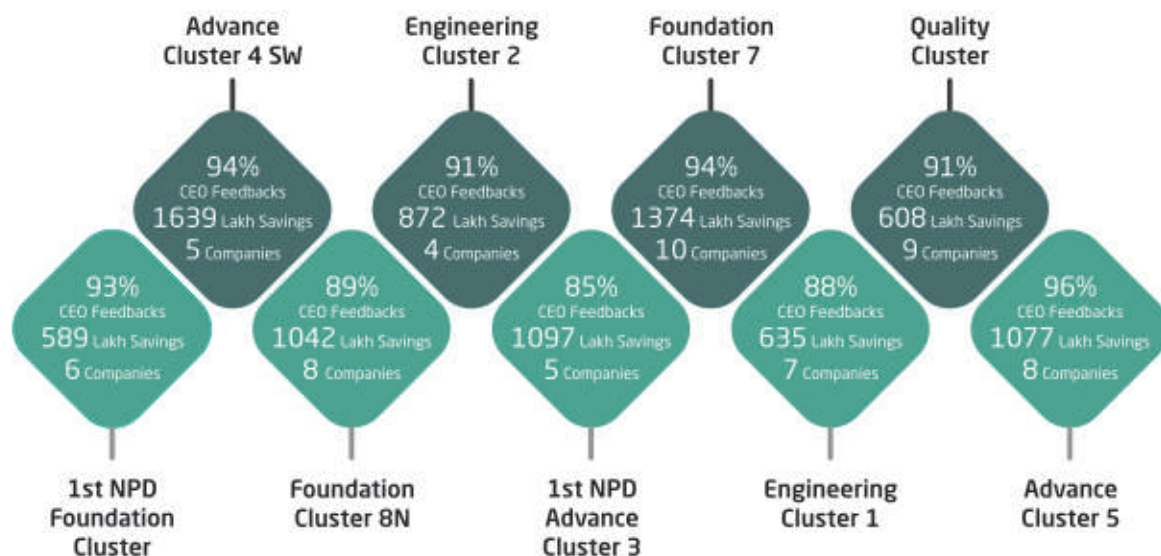
INTRODUCTION

The ACMA Centre of Technology (ACT) was set up in 1989 with a mandate to create excellence in quality and technology for the auto component industry in India. Over the years, ACT interventions have benefited over 750 manufacturing plants in areas of Operational Excellence,

New Product Development, Zero Defect and Zero Effect and related activities. These have resulted in improved productivity, conservation of space, enhanced resource efficiency, energy savings, zero defect quality, product development capabilities and overall cost reduction. ACT is also involved in designing and execution of the prestigious ACMA Awards, domestic and international study tours, knowledge seminars and conferences.



ACT Services are deployed through this mechanism



The Major Clusters Include:

ACT MSME cluster, ACMA UNIDO partnership cluster, ACT Foundation cluster, ACT Advanced Lean cluster, ACT IT Cluster, ACT Export Cluster, ACT Recourse Efficiency Cluster, ACT Engineering Excellence cluster, ACT New Product Development (NPD) cluster, ACT New Product Design Cluster, ACT Zero Defect and Zero Effect Cluster.

 ACT FOUNDATION CLUSTER	 ACT ADVANCE CLUSTER	 ACT ENGINEERING EXCELLENCE CLUSTER	 ACT ZERO DEFECT & ZERO EFFECT CLUSTER
 ACT NPD FOUNDATION CLUSTER	 ACT NPD DESIGN CLUSTER	 ACT EXPORT PROJECT Process audit & Customer Audit	 ACT ACMA - UNIDO QUALITY CLUSTER

ACTIVITY HIGHLIGHTS: 2016-17

24 October, 2016, Chennai: Launch of 4 New Clusters and Culmination of NPD Foundation Cluster,

The event saw the launch of 4 new clusters and culmination of 1st ACT New Product Development Foundation Cluster. The 4 new clusters were:



- 1st ACT New Product Development Design Cluster
- 2nd ACT New Product Development Foundation Cluster
- 2nd ACT ZERO Defect and ZERO Effect Cluster
- 10th ACT Advance Cluster

15&16 November, 2016: ACT 3rd Case Study Competition -

Awards were given out for:

- Innovation/automation
- Zero defect
- Zero effect
- Internet of Things
- Improvement in Productivity
- Improvement in Quality
- Cost Reduction



9 & 10 January, 2017: 2nd Summit of ACMA Centre for Technology - 'Innovations in Manufacturing - Make in India'

The summit focused on strategic discussions, addressed by noted industry luminaries, on topics ranging from Automation, Digitization, Future Manufacturing, Innovative business models, Optimizing resources, Zero defect quality and various others. The summit was graced by eminent personalities and dignitaries



International Training Programs



During 2016-17, the following programs were organised:

- ACMA - CARDIFF Executive Education Program Operation Excellence Study Tour & training program, Cardiff, UK from 12th to 16th June, 2017



- Visit at Sony Manufacturing Centre of Excellence
- Visit to MINI Oxford plant Pencoed, Cardiff, UK

ACT Alliances:

ACT signed an MOU with Cardiff Business School, UK for joint programs in executive education. Under this, ACT will conduct one week to two weeks program at UK in the areas of Advanced Lean, Data Analytics and Supplier Logistics.



ACT signed an MOU with AIA and is core member with IIT, Delhi for Government of India initiative for Digitization in manufacturing sector.



MoU was signed with DHI, IIT-Delhi, AIA & ACMA for designing DPR for implementation of Industry 4.0 across all Manufacturing Sectors.

ACT has also initiated programs with Engineering Colleges and other institutes for adding new curriculum to create Industry ready students and also conduct joint research projects to solve critical problems and develop new technologies.

YOUNG BUSINESS LEADERS' FORUM (YBLF)

INTRODUCTION

YBLF has been set up within ACMA as a forum that provides opportunity to its members to network among themselves, to listen to and interact with leaders in the automotive industry and other professions and also to learn best practices through visits to excelling companies. The membership comprises young, second and third generation entrepreneurs, between the age of 25-40, and typically, the members are ambitious, dynamic and fully energized to chart a new journey of growth for their enterprises.

The organization has a membership of over 198 people, many of whom are an integral part of the next phase of leadership for the auto-component industry in India. The group is keen to share and learn together, to enhance the business confidence and acquire leadership skills required to face the emerging challenges in the industry. In essence, YBLF focuses on grooming corporate leaders of tomorrow and is key to sustainable business practices among members from a succession planning and leadership perspective.

SCOPE & OBJECTIVE

With a vision to 'To nurture leadership skills and to bring about successful transformation of corporate leaders of tomorrow', YBLF provides a platform for its members to share common issues and concerns with respect to their companies/businesses and to collectively suggest and seek solutions. YBLF stands to give its members an opportunity to share, across the table, critical information on latest developments in the Indian and overseas automotive industries, which may have an impact on their individual businesses.

The forum is continuously helping its member companies to realign the organization systems and processes with rapidly changing global practices. The success of such an endeavor is usually driven by the sheer energy of its members and the 'new age' thinking that it imbibes. While YBLF is slowly but surely consolidating its position as a forum it is also taking steps to align better with ACMA activities and programs.

In the process, YBLF has been making all efforts to bring about a 'transition and succession planning', 'garner greater levels of competitiveness', 'entrepreneurship development', 'amicable environment', 'promote CSR' and 'promote the automotive industry to the OEM'. It engages members in activities which inspire, motivate and impart learning to enhance competitiveness and leadership skills and to help in creating an environment that encourages mutual co-operation; a better understanding and knowledge of global business practices; international linkages with counterpart bodies and a clearer vision of the future directions of business.

YBLF is focusing on a development agenda for the forum and deployment is being carried out with the following guiding path:

- To have clear and greater value proposition for its members through interesting programs focused beyond the automotive industry
- As most of the YBLF members are based out of the Northern Region, efforts are being put into enrolling more members from Western, Southern & Eastern Region.
- To engage members and comprehend their level of interest by regular interactions through meetings, organizing programs and informal get-togethers
- To prepare a list of programs, which could be organized and short-list based on the feedback of members, need of the industry and business
- To organize an International Mission every year.

ACTIVITY HIGHLIGHTS: 2016-17

APRIL 2016

With the support of the Indian Embassy in the Czech Republic, ACMA organized a delegation visit of YBLF members to the Czech Republic. Mr. Sanjay Labroo, Chief Mentor of YBLF and Past President ACMA led the 12 member delegation of young CEOs from 18-22 April, 2016. The broad objectives of this mission was to strengthen the economic and commercial relationship between both the countries, provide insight on Czech Republic as well as dwell on policy, investment opportunities to the delegates, understand the existing levels of technology, quality, productivity and R&D in the Czech automotive industry. The focus was also on meeting with vehicle manufacturers and Tier I suppliers, assess the possibilities of developing long term business relationship with the Czech Vehicle Manufacturers and Component Suppliers.



The delegates were made privy to the best practices followed by OEMs in Czech Republic like Skoda and Toyota Peugeot Citroen Automobile (TPCA). They also got a chance to interact with several agents and representatives from the Czech. The mission commenced with the visit to the Skoda plant in Mlada Boleslav where the delegates visited



the Skoda plants and the Skoda museum. The other meetings and plant visits during the mission were Toyota Peugeot Citroen Automobile (TPCA), Indian Embassy, Czech Invest, KPMG, MahleBehr, Magna Automotive and Varroc Lighting System

AUGUST 2016

YBLF organized an interactive session with Mr. Pawan Munjal - Chairman, MD & CEO, Hero MotoCorp Ltd. on August 29, 2016. The event commenced with a welcome note from Mr. Anmol Jain - National Coordinator, YBLF and Managing Director, Lumax Auto Technologies Limited. This was followed by a corporate presentation by Mr. Munjal, showcasing the journey of Hero MotoCorp Ltd. He also shared few of his learnings and experiences. The session was attended by around 70 delegates and Mr. Munjal invited YBLF members to visit the HeroMotoCorp plant



FEBRUARY 2017

There was also a two day visit to Pune from 28 February to 1 March 2017. The programme included interaction with senior management and visit to Sany Heavy Industry India Pvt Limited, interaction with senior management team of Force Motors at its plant in Chakan, discussion with Sudhir



Rao, Managing Director, Skoda India and visit to Mercedes Benz plant at Chakan. During the interaction participants absorbed the levels of automation in the plants.

MARCH 2017

Over 30 YBLF members visited Chennai on 23 and 24 March 2017. The delegates visited Hyundai Motors India Limited, Sriperumbudur, Daimler India Commercial Vehicles Limited, Sriperumbudur, and interacted with Mr Vinod Dasari, Managing Director, Ashok Leyland Ltd, Chennai. The key learning of the visit was about automation, BB Kanban Systems, collaboration and its impact on growth, lean methodology at Daimler, supermarket structure along manufacturing line, greater involvement with staff including a feedback loop.



ACMA
PUBLICATIONS / 2016-17

ACMA regularly publishes the following newsletters:

- Auto News, which is published every two months and covers industry related updates and the association's activities over the period under review



- Impact (earlier known as ACT Now), which is published every quarter by the ACMA Centre of Technology (ACT). It covers the centre's activities and gives insights into best global practices for productivity, quality, technology and profitability



In addition, there were certain major studies undertaken during 2016-17.



The ACMA-Mckinsey report “Winning with Quality and Innovation” was released during the ACMA Annual Session in 2016. The report highlights the need for the auto component industry to develop a quality culture, one which is embodied and championed by their leadership. Leaders need to recognize the significance of innovation, which can help companies tide-over successfully the changing

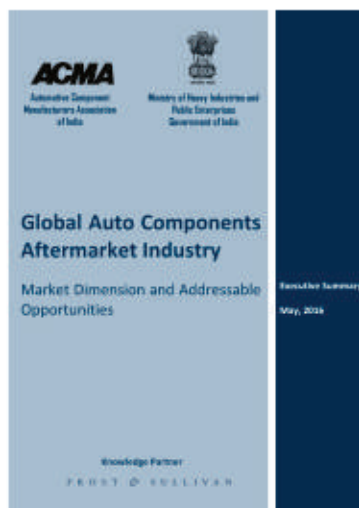
scenario prompted by new technologies and disruptive competitors. The concern for quality needs to lie at the heart of the operating, management and people systems of the organization—building and investing in quality processes across the value stream; planning, measuring performance and taking decisions with a quality focus; and building a quality mind-set among people and equipping them to deliver to the highest standards. The scope for innovation in an organization could lie across three themes: product and portfolio, process, and business model. Indian auto suppliers have already innovated in these areas—forged Aluminium wheels for commercial vehicles, optimized software to reduce wastage, and moved from parts to modules. But there is potential to do much more.

The ACMA-Frost and Sullivan study titled ‘Indian Automotive Aftermarket Study’ presented a thorough qualitative narrative on the current practices and trends in the market through over 1,100 in-depth interviews with a variety of stakeholders in the industry. The report was unveiled during ACMA Automechanika New Delhi in February 2017, covering the economic climate and key attributes of the automotive industry in the major global markets of United States of America, Japan and China including a narrative of these elements in India. It also focuses on the Indian automotive industry and presents growth forecasts for each of the assessed vehicle segments. There is also an analysis of qualitative findings from the extensive primary research conducted for this study covering areas ranging from the concerns surrounding spurious parts, to the legal provisions available to combat these parts, to the trends by vehicle segment and general practices of the distributors, retailers and mechanics. It has coverage on key trends that will impress upon the future of the industry across areas such as vehicle telematics, vehicle servicing, e-retailing and importantly, GST and its expected impact on supply chain practices. Extensive insights are given on the pre-owned car market, the taxi market and the automotive regulations in India and the impact and opportunities that these present for the industry in the future. The report concludes with coverage on the alternate fuel technology in India, some



insights on changing customer preferences. As part of this study, the aftermarket size was estimated for a range of 50 components across vehicle segments. These included engine components, drive, transmission and steering components, suspension and braking components, cooling systems, electrical and electronics and consumables. The aftermarket size for these components in 2016-17, is estimated at around Rs.56,098 Crore factoring the total vehicle parc of around 228.7 million vehicles across the country.

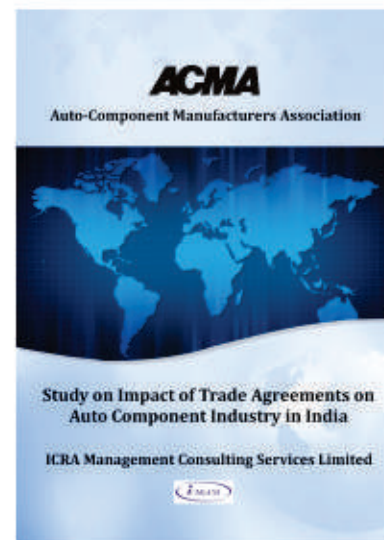
The ACMA-Frost and Sullivan study in collaboration with Ministry of Heavy Industries and Public Enterprises, Government of India titled "Global Auto-Component After Market Industry: Market Dimension and Addressable opportunities" undertook a detailed analysis of 20 top countries where India could export. The estimated total after market potential for these countries was USD 41.5 billion; of which Latin America comprised USD 25.4 billion, CIS USD 10.1 billion and Africa USD 5.9 billion. The top four countries including Mexico, Brazil, Russia and Argentina accounted for 72% of the total potential. The top three component categories comprised 60% of total potential. This includes engine components, electricals and drive transmission and steering. In the present case, the top four countries importing from India included Brazil (USD 210 million), Egypt (USD 85 million), Mexico (USD 57 million) and South Africa (USD 43 million).



The ACMA-Frost and Sullivan "Automotive Electronics Study" was undertaken in 2016-17 to highlight the potential of the automotive electronics market for Indian manufacturers, which is predominantly reliant on imports today. The study suggests that the overall opportunity available for suppliers in Auto Electronics (all Short, Medium Term Technologies and Sensors) is approximately Rs.36,500 Crore by FY2020, while the total addressable market is expected to be Rs.22,300 crore by 2020, while the current size is estimated to be Rs.19,000-Rs.20,000 crore. In the current scenario electronics for Auto application are predominantly imported and there is a constant rise in its trade imbalance. Lack of a component ecosystem is the major hindrance in the growth of indigenous auto electronics market in India. Growth of Auto Electronics in India is possible only when ACMA members and Government take some initiatives with clear focus on long term plans.



Impact of Trade Agreements on Auto Component Industry in India report is jointly developed by ACMA in partnership with



IMAcs providing an in depth assessment of auto component trade across specific regions/countries where India has signed trade agreements namely ASEAN, Thailand, Japan, South Korea, MEROSUR and Chile, along with a review of various trade policies, non-tariff measures and other trade barriers being employed by the major competing auto manufacturing and automotive market countries - Japan,

South Korea, Indonesia, Thailand, Malaysia, Germany, Brazil, and USA. The reports highlights the insights derived from interactions with the auto industry in India, review of non-tariff barriers to trade, review of cost competitiveness and ease of doing business across countries, to provide a way forward for increasing global market access and a strategy to negotiate trade agreements.

PEOPLE AT ACMA

Past Presidents

Dr. Pranlal Patel (Late)	1959-1966	Mr. S. Viji	1992-1994
Mr. M.K. Raju (Late)	1966-1968	Mr. D.K. Jain	1994-1996
Mr. W.N. Talwar (Late)	1968-1970	Mr. K. Mahesh	1996-1998
Mr. P.V. Shah (Late)	1970-1971	Mr. Dinesh Munot	1998-1999
Mrs. Sharayu Daftary	1971-1972	Mr. V.K. Mehta	1999-2000
Mr. M.S. Shastri (Late)	1972-1973	Mr. L. Ganesh	2000-2001
Mr. D.R. Sondhi (Late)	1973-1974	Mr. K. Kejriwal	2001-2002
Mr. V.R. Sivaraman (Late)	1974-1975	Mr. Deep Kapuria	2002-2003
Mr. M.K. Jhavar (Late)	1975-1976	Mr. K.V. Shetty (Late)	2003-2004
Mr. Harjan Singh (Late)	1976-1977	Mr. Deep Kapuria	2004-2005
Mr. S. Muthukrishnan (Late)	1977-1978	Mr. A.K. Taneja	2005-2006
Mr. R. Bhandari	1978-1979	Mr. Raghu Mody	2006-2007
Mr. N. Venkataraman (Late)	1979-1980	Mr. Sanjay Labroo	2007-2008
Mr. V. Chidambaram (Late)	1980-1981	Mr. J. S. Chopra (Late)	2008-2009
Dr. Abhay N. Firodia	1981-1982	Mr. Jayant Davar	2009-2010
Mr. Suresh Krishna	1982-1984	Mr. Srivats Ram	2010-2011
Mr. Pran Talwar (Late)	1984-1986	Mr. Arvind Kapur	2011-2012
Mr. L. Lakshman	1989-1987	Mr. Surinder Kanwar	2012-2013
Mr. Amar Singh	1987-1989	Mr. Harish Lakshman	2013-2014
Mr. T.K. Balaji	1989-1991	Mr. Ramesh Suri	2014-2015
Dr. Surinder Kapur (Late)	1991-1992	Mr. Arvind Balaji	2015-2016

Executive Committee

President	Vice President	Immediate Past President
Mr. Rattan Kapur	Mr. Nirmal Minda	Mr. Arvind Balaji
Mark Exhaust Systems Ltd.	Minda Industries Ltd.	Lucas TVS Ltd.

Elected Members

Member	Company
Ms. Pilloo C. Aga	GoldSeal-SaarGummi India Pvt. Ltd.
Mr. S. K. Arya	Jai Bharat Maruti Ltd.
Mr. Soumitra Bhattacharya	Bosch Ltd.
Mr. Beni Daga	Baynee Industries
Mr. Arvind Goel	TATA AutoComp Systems Ltd.
Mr. Sunjay Kapur	Sona Koyo Steering Systems Ltd.
Mr. Pranav Kapuria	Hi-Tech Gears Ltd.
Mr. Ravi Machani	Stumpp Schuele & Somappa Springs Pvt. Ltd.
Mr. Utkarsh Munot	ZF Steering Gear (India) Ltd.
Mr. C. N. Prasad	Sundaram - Clayton Ltd.
Mr. Jagdeep Singh Rangar	Stork Rubber Products Pvt. Ltd.
Mr. Kirti Rathod	Delux Bearings Pvt. Ltd.
Mr. F. R. Singhvi	Sansera Engineering Pvt. Ltd.
Ms. Shradha Suri Marwah	Subros Ltd.
Mr. Sriram Viji	Brakes India Pvt. Ltd.
Ms. Harshbeena S. Zaveri	NRB Bearings Ltd.
Mr. Upkar Singh Ahuja	New Swan Enterprises
Dr. Alka Kaul	Horizon Industrial Products Pvt. Ltd.
Mr. Ranjot Singh	Emdet Jamshedpur Pvt. Ltd.

Co-opted Members

Member	Company
Mr. Deepak Chopra	Anand Automotive Pvt. Ltd.
Mr. K. S. Rathee	ASK Automotive Pvt. Ltd.
Mr. Jasvinder Singh Seehra	GNA Axles Ltd.
Mr. Sanjay Malhotra	Jumps Auto Industries Ltd.
Mr. Mayank Kejriwal	Kiswok Industries Pvt. Ltd.
Ms. Shuba Kumar	Natesan Synchrocones Pvt. Ltd.
Mr. Pravin Malhotra	Nipman Fastener Industries Pvt. Ltd.

Special Invitees

Member	Company
Mr. Rajeev R. Panse	Autocomp Corporation Panse Pvt. Ltd.
Mr. Claude d’Gama Rose	Continental Automotive Components (India) Pvt. Ltd.
Mr. Abhimanyu Sharaff	Ecocat (India) Pvt. Ltd.
Mr. Ramashankar Pandey	Hella India Lighting Ltd.
Mr. Vijay B Pusalkar	Indo Schottle Auto Parts Pvt. Ltd.
Mr. Randeep Jauhar	Jamna Auto Industries Pvt. Ltd.
Mr. J. Sridhar	Magal Engg. Tech. Pvt. Ltd.
Mr. Rajat Bhandari	Makino Auto Industries Pvt. Ltd.
Mr. Shailesh Arora	Maxop Engineering Co. Pvt. Ltd.
Mr. Rohit Saboo	National Engineering Industries Ltd.
Mr. Ajay Kumar Jain	PPAP Automotive Ltd.
Mr. Vinay Lakshman	Rane Brake Lining Ltd.
Mr. Gursharan Singh	RACL Geartech Ltd.
Mr. Balbir Singh Chhabra	Right Tight Fasteners Pvt. Ltd.
Mr. Nishit Behera	RSB Transmissions (I) Ltd.
Mr. Harish K Sheth	Setco Automotive Ltd.
Ms. Arathi Krishna	Sundaram Fasteners Ltd.
Mr. Umesh Talwar	Talbro Automotive Components Ltd.
Mr. Arun Gupta	Technico Industries Ltd.
Mr. S. J. Taparia	The Supreme Industries Ltd.

Regional Chairpersons

Member	Company
EASTERN REGION - Mr. Killol Kamani	Samarth Engineering Co. Pvt. Ltd.
NORTHERN REGION - Mr. Sunil Arora	Abilities India Pistons & Rings Ltd.
SOUTHERN REGION - Mr. A Venkataramani	India Pistons Ltd.
WESTERN REGION - Mr. Piyush I. Tamboli	Investment & Precision Castings Ltd.

Deputy Regional Chairpersons

Member	Company
EASTERN REGION - Mr. Sanjay Sabherwal	Metaldyne Industries Ltd.
NORTHERN REGION - Mr. Deepak Jain	Lumax Industries Ltd.
SOUTHERN REGION - Mr. P. Kaniappan	WABCO India Ltd.
WESTERN REGION - Mr. Piyusha Munot	KCTR Varsha Automotive Pvt. Ltd.

Zonal Co-ordinators

Eastern Region

Member	Zone	Company Name
Mr. Ranjot Singh	Jamshedpur	Emdet Jamshedpur Pvt. Ltd.
Mr. Mayank Kejriwal	Kolkata	Kiswok Industries Pvt. Ltd.

Northern Region

Member	Zone	Company Name
Mr. Kiran Deshmukh	Gurgaon & Rajasthan	Sona Koyo Steering Systems Ltd.
Mr. Rajesh Jain	Rohtak, Hissar & Yamunanagar	Lakshmi Precision Screws Ltd.
Mr. Hitesh Jain	Uttarakhand	Roop Polymers Ltd.
Mr. U. S. Ahuja	Punjab & Chandigarh	New Swan Enterprises
Mr. V K Jayaswal	Uttar Pradesh	Shriram Pistons & Rings Ltd.
Mr. Abhimanyu Sharaff	Faridabad	Ecocat (India) Pvt. Ltd.

Southern Region

Member	Zone	Company Name
Mr. S. Baligar	Karnataka & Hosur	Toyota Kirloskar Auto Parts Pvt Ltd
Mr. S. Ganesh	Andhra Pradesh & Telangana	Liners India Ltd
Mr. J. Sridhar	Chennai	Magal Engg Tech Pvt. Ltd.
Mr. S. Narayanan	Coimbatore	Bimetal Bearings Ltd.

Western Region

Member	Zone	Company Name
Mr. Sidhesh Raikar	Nashik	Goldy Precision Stampings Pvt. Ltd.
Mr. Pawan Choudhary	Aurangabad	Hindustan Composites Ltd.
Mr. Piyush I. Tamboli	Gujrat	Investment & Precision Castings Ltd
Mr. Piyush Munot	Pune	KCTR Varsha Automotive Pvt. Ltd.
Mr. Vijay Menon	Kolhapur/Satara	Menon and Menon Ltd.
Mr. Devendra Jain	Pithampur/Dewas	Porwal Auto Components Ltd.

WORKFORCE 2016-17

Head Office	ACT	South
Abhishek Chopra	Aniket Khasnis	Anil Kumar Unni
Amit Mukherjee	Atul Kr. Gupta	G Mani
Anjali Nair	Binny Tomy	Neeraja S. Rao
Anupam Kaushik	Deepak Jain	Priya Sriram
Ashok Kumar	Dinesh A. Vedpathak	R. Hariram
Ashwani Kumar	Ekta Agrawal	R. Raja Shekhar
Chandu Chaudhary	Mahesh Gupta	
Debasish Maity	Rupesh Sonania	West
Deepak Rajput	Sakshi S. Karkamkar	Ashwani Jotshi
Ecktta	Sapana Milind Baravkar	Ashwini Anupam Kulkarni
Harish Kapoor	Sunil Mutha	Jeetendra Kumar Singh
Harkaran Malhotra	Tanu Ahuja	Lincy Varghese
Lokesh Raina	V K Sharma	Sheetal Ghodke
Monika S. Handa	Vishal Saxena	Sudesh Janardhan Sutar
Muskan Jain		Suhas Appa Pandave
Niladri Mallick	East	Vijith Vijayan Nair
Pooja Sharma	Rahul Kumar	
Praveen Belwal	Vadivelan Gounder	
Prem Kumar	Yogita Satpathy	
Rajat Gaur		
Rajat Puri	North	
Rajeshwar Rai	Deepti Panikker	
Rupender Kaushik	Hansraj Sharma	
Sapna Vijn	Jairaj Kumar	
Seema Babal	Mayank Nigam	
Sheetal Gupta	Meenakshi Narayanan	
Subhag Naqvi		
Sudip Guha Roy		
Sushil Rajput		
Vijay Kanojia		
Vikram Saigal		
Vinnie Mehta		

List of Members

A

A. G. Industries Pvt. Ltd.
A. Raymond Fasteners India Pvt. Ltd.
Aakar Foundry Pvt. Ltd.
AAM India Manufacturing Corporation Pvt. Ltd.
Aar Aar Technoplast Pvt. Ltd.
Aavran
ABC Bearings Ltd.
Abhijeet Plastics India Pvt. Ltd. Unit III
Abhijeet Techno-Plast (I) Pvt. Ltd.
Abilities India Pistons & Rings Ltd.
Able Spring Manufacturers
Accurate Products Corporation Pvt. Ltd.
Ace International
Acey Engineering Pvt. Ltd.
Aditya Auto Products & Engineering (I) Pvt. Ltd.
Admach Auto India Ltd.
Advance Forgings Pvt. Ltd.
Advik Hi-Tech Pvt. Ltd.
Aequs Automotive Pvt. Ltd.
Agni College Of Technology
Agrasen Engineering Industries Ltd.
Agrim Components Pvt. Ltd.
Aisin Automotive Karnataka Pvt. Ltd.
Akal Spring Ltd.
Akar Tools Ltd.
ALF Engineering Pvt. Ltd.
Alfa Flexitubes Pvt. Ltd.
Alicon Castalloy Limited
All India Rubber Industries Association
Allena Auto Industries Pvt. Ltd.
Allevard IAI Suspensions Pvt. Ltd.
Allied Autotech International Pvt. Ltd.
Allied Nippon Ltd.
Almighty Auto Ancillary Pvt. Ltd.
ALP Nishikawa Company Pvt. Ltd.
Alpha Springs Chennai (P) Ltd.

Amalgamations Repco Ltd.
Amar Autoengg. Pvt. Ltd.
Amar Autotech Pvt. Ltd.
Ambattur Industrial Estate Manufacturers' Association (AIEMA)
Ample Auto Tech Pvt. Ltd.
Amtek Auto Ltd.
Amul Industries Pvt. Ltd.
AMW Auto Component Ltd.
Anand Automotive Pvt. Ltd.
Anand I-Power Ltd.
Anand Motor Products Pvt. Ltd.
Anand NVH Products (P) Ltd.
Anand Piston International
Anu Industries Ltd.
Apls Automotive Industries Pvt. Ltd.
ARB Bearings Ltd
Arcotech Ltd.
Aristocraft International Pvt. Ltd.
Arvind Engineering Works Ltd.
Asahi India Glass Ltd.
Ashok Iron Works Pvt. Ltd.
Ashra Consultants Pvt. Ltd.
Ashutosh Rubber Pvt. Ltd.
ASK Automotive Pvt. Ltd.
ASL Industries Limited
Aspee Precision Components Pvt. Ltd.
Aspee Springs Ltd.
Aspra Engineering India Pvt. Ltd.
Associated Manufacturing LLP
Atop Fasteners Pvt. Ltd.
Aurangabad Electricals Ltd.
Authentication Solution Providers' Association (ASPA)
Auto Cluster Development and Research Institute Ltd.
Auto Ignition Ltd.
Auto Pins (India) Ltd.
Auto Shell Perfect Moulder Ltd.

Autocomp Corporation Panse Pvt. Ltd.
Autocop (India) Pvt. Ltd.
Autofit Pvt. Ltd.
Autoflex Pvt. Ltd.
Autoline
Autolite (India) Ltd.
Autoliv India Pvt. Ltd.
Autometers Alliance Ltd.
Automotive Axles Ltd.
Automotive Valves Pvt. Ltd.
Autostart India Pvt. Ltd.
AVO Carbon India (P) Ltd.
AVR Valves Pvt. Ltd.
AVS Brake Linings Pvt. Ltd.
Avtec Ltd.
Axles India Ltd.

B

B. J. Spring Ltd.
Badve Engineering Ltd.
Bajaj Motors Ltd.
Balu India
Banco Products (India) Ltd.
Bar International Inc.
BASF Catalysts India Pvt. Ltd.
Baynee Industries
Belmaks Pvt. Ltd.
Belmont Rubber Pvt. Ltd.
Benara Bearings & Pistons Ltd.
Benara Udyog Ltd.
Besmak Components Pvt. Ltd.
Besoto Starting Systems Pvt. Ltd.
Best Koki Automotive (P) Ltd.
Beta Industrial Products
Bharat Axles Pvt. Ltd.
Bharat Forge Ltd.
Bharat Gears Ltd.
Bharat Seats Ltd.

Bhavani Industries

Bill Forge Pvt. Ltd.

Bimetal Bearings Ltd.

Bindra Motors Pvt. Ltd.

Birla Precision Technologies Ltd.

BMC Metalcast Ltd.

Bohra Rubber Pvt. Ltd.

Bollhoff Fastenings Pvt. Ltd.

Bony Polymers Pvt. Ltd.

Borgwarner Cooling Systems
India Pvt. Ltd.

BorgWarner Morse Systems India
Private Ltd.

Bosch Chassis Systems India Pvt. Ltd.

Bosch Ltd.

Brakes India Pvt. Ltd.

Brakewel Automotive Components (I)
Pvt. Ltd

Brembo Brake India Pvt. Ltd.

Brose India Automotive Systems
Pvt. Ltd.

Bundy India Ltd.

C

Calex Auto

Caltherm Thermostats Pvt. Ltd

Caparo Engineering India Ltd.

Carl Bechem Lubricants (India) Pvt. Ltd.

Carlisle Trading & Manufacturing
India Pvt. Ltd.

Carrier Wheels Pvt. Ltd.

Cerazit India Pvt. Ltd.

Chamber of Marathwada Industries
and Agriculture

Chandok Automotive Manufacturers Ltd.

Chang Yun India Pvt. Ltd.

Chaphekar Engineering Pvt. Ltd.

Chennai Institute of Technology

Chopra Autotech Pvt. Ltd.

Chopra Industries Pvt. Ltd.

CI Car International Pvt. Ltd.

Circlips India Pvt. Ltd.

Citizen Press Components

Climax Overseas Pvt. Ltd.

Clutch Auto Ltd.

Comstar Automotive Technologies
Pvt. Ltd.

Concentric Pumps Pune Pvt. Ltd.

Conic Automotive Pvt. Ltd.

Continental Automotive Components
(India) Pvt. Ltd.

Continental Engines Pvt. Ltd.

Cooper Corporation Pvt. Ltd.

Coventry Coil-O-Matic (HR) Ltd.

CRP (India) Pvt. Ltd.

Cummins Technologies India Ltd.

D

D P Engineering Industries Ltd.

Daejung Moparts Pvt. Ltd.

Dali & Samir Engineering Pvt. Ltd.

Dana India Pvt. Ltd.

DCM Engineering Products

Deep Precision Industries

Dell'orto India Pvt. Ltd.

Delphi Automotive Systems Pvt. Ltd.

Delphi-TVS Diesel Systems Ltd.

Delux Bearings Pvt. Ltd.

Demanik Enterprises

Denso International India Pvt. Ltd.

Deusch Kyosei Engineering

Deusch Motocomp Pvt. Ltd.

Devendra Exports Pvt. Ltd.

Devilog Systems (India)

Dhoot Transmission Pvt. Ltd.

Dipty Lal Judge Mal Pvt. Ltd.

Donaldson India Filter Systems Pvt. Ltd.

Drill Jig Bushing Co. (Madras) Pvt. Ltd.

Duroshox Pvt. Ltd.

Durovalves India Pvt. Ltd.

DVS Industries Pvt. Ltd.

Dyna-K Automotive Stampings Pvt. Ltd.

Dynamic Technologies Ltd.

E

Eaton Industrial Systems Pvt. Ltd.

Ecocat (India) Pvt. Ltd.

Elcomponics Sales Pvt. Ltd.

Electrica Engineers (India) Pvt. Ltd.

Electromags - A Division of Bombay
Burmah Trading Corp. Ltd.

Elofic Industries Ltd.

Emdet Jamshedpur Pvt. Ltd.

Emission Controls Manufacturers
Association

Emkay Automobile Industries Ltd.

Emmbros Autocomp Ltd.

Enco Engineers Combine
(Plant -II) Pvt Ltd

Endurance Technologies Ltd.

Engineering Technologies

Essae Digitronics Pvt. Ltd.

Esteem Auto Pvt. Ltd.

ET Elastomer Technik India Pvt. Ltd.

Excel Polymotive

Exedy India Ltd.

Exotech Zanini Industries Pvt. Ltd.

F

FAG Bearings India Ltd.

Fairfield Atlas Ltd.

Fanuc India Private Ltd.

Faurecia Automotive Seating
India Pvt. Ltd.

Faurecia Emissions Control
Technologies India Pvt. Ltd.

Faurecia Interior Systems India Pvt. Ltd.

Federal-Mogul Goetze (India) Ltd.

Ferromatik Milacron India Pvt. Ltd.

Fiem Industries Ltd.

Filtrum Polymers Pvt Ltd

Fine Blanking Pvt. Ltd.

Fitco Engineers Pvt. Ltd.

Fitex Industries Ltd.

Flash Electronics (I) Pvt. Ltd.

Fleetguard Filters Pvt. Ltd.

Flometallic India Private Limited

Flowwell Castings Pvt. Ltd.

Flywheel Ring Gears Pvt. Ltd.

Foundation Brake Manufacturing Ltd.

Flywheel Ring Gears Pvt. Ltd.

Friends Castings Pvt. Ltd.

G

G B Rubber Products
G I Auto Pvt. Ltd.
G. S. Auto International Ltd.
G. S. Autocomp Pvt. Ltd.
Gabriel India Ltd.
Gajra Gears Pvt. Ltd.
Gala Precision Engineering Pvt. Ltd.
Galaxy Bearings Ltd.
Galaxy Indicators (I) Pvt. Ltd.
Gatiman Auto Pvt. Ltd.
Gearock Forge Pvt. Ltd.
Gestamp Automotive Chennai Private Ltd.
Ghaziabad Precision Products Pvt. Ltd.
Gilard Electronics Pvt. Ltd.
GKDITR- Tooling Centre
GKN Driveline (India) Ltd.
GKN Sinter Metals Pvt. Ltd.
Global Automotive Components (P) Ltd.
Global Autotech Ltd.
Global Liners
GNA Axles Ltd.
GNA Gears Ltd.
GNA Udyog Ltd.
Gold Seal-Saar Gummi India Pvt. Ltd.
Goldy Precision Stampings Pvt. Ltd.
Gould Automotive
Grace Infrastructure Pvt. Ltd.
Graziano Trasmissioni India Pvt. Ltd.
Greenfuel Energy Solutions Pvt. Ltd.
Grind Master Machines Pvt. Ltd.
Gulati Auto Electricals Pvt. Ltd.
Guru Nanak Auto Enterprises Ltd.

H

Haldex India Pvt. Ltd.
Hampson Industries Pvt. Ltd.
Hanon Automotive Systems India Pvt Ltd
Hanon Climate Systems India Pvt. Ltd.
Happy Steels Pvt. Ltd.

Harinder Industries Pvt Ltd
Harita Seating Systems Ltd.
Harman International (India) Pvt. Ltd.
Harsha Engineers Ltd.
Hella India Automotive Pvt Ltd.
Hella India Lighting Ltd.
Helvoet Rubber & Plastic Technologies (India) Pvt. Ltd.
Hero Cycles Ltd.
Hero Motors Ltd.
Highco Engineers (P) Ltd.
Highway Industries Ltd.
Hilux Auto Electric Pvt. Ltd.
Hi-Lux Automotive Pvt. Ltd.
Hinduja Foundries Ltd.
Hindustan Composites Ltd.
Hindustan Hardy Spicer Ltd
Hirschvogel Components India Pvt. Ltd.
Hitachi Automotive System Pune Pvt. Ltd.
Hi-Tech Engineering Systems Pvt. Ltd.
Hitkari Hitech Fibres Pvt. Ltd.
Hodek Vibration Technologies Pvt. Ltd.
Honeywell Turbo Technologies India Pvt. Ltd.
Horizon Industrial Products Pvt. Ltd.
Huf India Pvt. Ltd.

I

I E Auto Industrial Enterprise Pvt. Ltd.
Ibex Products Pvt. Ltd.
IFB Automotive Pvt. Ltd.
IFB Industries Ltd.
IM Gears Pvt. Ltd.
Imperial Auto Industries Ltd.
INA Bearings India Pvt. Ltd.
India Forge and Drop Stampings Ltd.
India Japan Lighting Pvt. Ltd.
India Nippon Electricals Ltd.
India Pistons Ltd.
Indian Diecasting Industries
Indication Instruments Ltd.
Indo Autotech Ltd.

Indo-MIM Pvt. Ltd.
Indo-Schottle Auto Parts Pvt. Ltd.
Indo-Shell Mould Ltd.
Industrial Engineering Syndicate
Industrial Forge & Engineering Co. Ltd
Industrial Rubber Products
Industrial Rubber Products Pvt. Ltd.
Infineon Technologies India Pvt. Ltd.
Injectoplast Pvt. Ltd.
Innova Rubbers Pvt. Ltd.
Insulation & Electrical Products Pvt. Ltd.
Integra Automation Pvt. Ltd.
Interface Microsystems
Inteva Products India Automotive Pvt. Ltd.
Investment & Precision Castings Ltd.
IP Rings Ltd.
IST Ltd.

J

J. K. Fenner (India) Ltd.
J.S.S. Steelitalia Ltd.
Jagan Lamps Ltd.
Jai Jawan Auto Components
Jaidarshan Indocraft Pvt. Ltd.
Jalex Automotive Pvt. Ltd.
Jamna Auto Industries Ltd.
Japji Enterprises
Jay Bharat Maruti Ltd.
Jay Switches (India) Pvt. Ltd.
Jay Ushin Ltd.
Jaya Hind Industries Ltd.
Jayanti Rubber Industries
Jayashree Polymers Pvt. Ltd.
Jayem Auto Industries Pvt. Ltd.
JBM Auto Ltd.
JBM Ogihara Automotive India Ltd.
JM Frictech India Pvt. Ltd.
Johnson Matthey India Pvt. Ltd.
JSK Bearings Company Pvt. Ltd.
Jtekt Sona Automotive India Ltd.
Jumps Auto Industries Ltd.

K

K.R. Industries
Kafila Forge Ltd.
Kalisma Steels Pvt. Ltd.
Kalyani Forge Ltd.
Kamal Rubplast Industries Pvt. Ltd.
Kaneri Enterprises
Kavia Engineering Private Ltd.
Kay Jay Forgings Pvt. Ltd.
KCTR Varsha Automotive Pvt. Ltd.
Keihin India Manufacturing Pvt. Ltd.
Kems Forgings Ltd.
Kern-Liebers (India) Pvt. Ltd.
KIE Engineering Pvt. Ltd.
Kigotek Automotriz Pvt. Ltd.
Kiran Udyog
Kirat Plastics Pvt. Ltd.
Kishan Autoparts Pvt. Ltd.
Kiswok Industries Pvt. Ltd.
Klassic Wheels Pvt. Ltd.
KMP Manufacturing Company
Knorr-Bremse Systems for Commercial Vehicles India Pvt. Ltd.
Kongovi Electronics Pvt. Ltd.
Kores (India) Ltd.
KOSTAL India Pvt. Ltd.
Kova Fasteners Pvt. Ltd.
Koyo Bearings India Pvt. Ltd.
KPIT Technologies Ltd.
Krishna Maruti Ltd.
KSPG Automotive India Pvt. Ltd.
KSS Abhishek Safety Systems Pvt.Ltd.
Kulkarni Engineers
Kunstocom (India) Ltd.
Kusalava International Ltd.

L

L. G. Balakrishnan & Bros. Ltd.
Lakhani Rubber Works
Lakshmi Precision Screws Ltd.
Lasko Engineering Co.
Laxmi Metal Pressing Works Pvt. Ltd.

Lear Automotive India Pvt. Ltd.
Lifelong India Ltd.
Linamar India Pvt. Ltd.
Liners India Ltd.
Litens Automotive (India) Pvt. Ltd.
Lucas TVS Ltd.
Luk India Pvt. Ltd.
Lumax Auto Technologies Ltd.
Lumax Cornaglia Auto Technologies Pvt. Ltd.
Lumax DK Auto Industries Ltd.
Lumax Industries Ltd.
Lumax Mannoh Allied Technologies Ltd.
Lumax Mannoh Allied Technologies Ltd.

M

M & M Machine Craft Pvt. Ltd.
M.D. Industries
M.K. Auto Industries
M.K. Auto Components India Ltd.
M.V.D. Auto Components Pvt. Ltd.
Maadhav Automotive Fasteners Pvt. Ltd.
Macas Automotive
Machino Plastics Ltd.
Machino Polymers Ltd.
Maco Pvt. Ltd.
Madhusudan Auto Ltd.
Madras Engineering Industries Pvt. Ltd.
Madras Radiators And Pressings Ltd.
Mag Filters & Equipments Pvt. Ltd.
Magal Engg. Tech Pvt. Ltd.
Magna Automotive (India) Pvt. Ltd.
Magneti Marelli India Pvt. Ltd.
Magnum MI Steel Pvt. Ltd.
Mahavir Die Casters Pvt. Ltd.
Mahindra CIE Automotive Ltd.
Mahindra Gears & Transmissions Pvt. Ltd.
Mahindra Sona Ltd.
MAHLE Behr India Ltd.
MAHLE Engine Components India Pvt. Ltd.

Mahle Filter Systems (India) Ltd.
Mahratta Chamber of Commerce, Industries & Agriculture
Maini Precision Products Pvt. Ltd.
Makino Auto Industries Pvt. Ltd.
Makino Automotive
Mandap International Pvt. Ltd.
Mando Automotive India Pvt. Ltd.
Mangal Industries Ltd.
Mann and Hummel Filter Pvt. Ltd.
Mansons International Pvt. Ltd.
Marathwada Auto Compo Pvt. Ltd.
Mark Exhaust Systems Ltd.
Masu Brakes Pvt. Ltd.
Maxop Engineering Co. Pvt. Ltd.
Mayur Uniquoters Ltd.
MEC Bearings Pvt. Ltd.
Meenakshi Polymers Pvt. Ltd.
Mega Rubber Technologies Pvt. Ltd.
Megatrend Fabcon Pvt. Ltd.
Meghdoot Pistons
Mehta Engineers Ltd.
Menon and Menon Ltd.
Metaforge Engineering (India) Pvt. Ltd.
Metal Form
Metal Shaping & Processing Pvt. Ltd.
Metaldyne Industries Ltd.
Metallic Auto Liners Pvt. Ltd.
Metalman Auto Pvt. Ltd.
Metalman Micro Turners
Metalsa India Pvt. Ltd.
Metexim (Sourcing) Pvt. Ltd.
Micron Enterprises
Microsign Products
Mikuni India Pvt. Ltd.
Minda Corporation Ltd.
Minda Furukawa Electric Pvt. Ltd.
Minda Industries Ltd.
Minda Sai Ltd.
Minda Silca Engineering Pvt. Ltd.
Minda Stoneridge Instruments Ltd.
Minda Vast Access Systems Pvt. Ltd.

Mindarika Pvt. Ltd.

Mitsuba Sical India Ltd.

Mitsubishi Electric Automotive India Pvt. Ltd.

MK Fasteners

MM Auto Industries Limited

Mobis India Ltd.

Motherson-Sumi Systems Ltd.

Motoplast Components

Mubea Automotive India Pvt. Ltd.

Multitech Auto Pvt. Ltd.

Mungi Engineers Pvt. Ltd.

Munjál Auto Industries Ltd.

Munjál Kiriú Industries Pvt. Ltd.

Munjál Showa Ltd.

Musashi Auto Parts India Pvt. Ltd.

Mutha Founders Pvt. Ltd.

Mutual Industries Ltd.

N

Nachi Tecnology India Pvt. Ltd.

Napino Auto & Electronics Ltd.

Narasipur Auto Components Pvt. Ltd.

Nash Products

Natesan Synchrocones Pvt. Ltd.

National Engineering Industries Ltd.

Nelcast Ltd.

Nelson Global Products India Pvt. Ltd.

Nemak Aluminium Castings India Pvt. Ltd.

Neolite ZKW Lightings Pvt. Ltd.

NeoSym Industry Ltd.

New Engineering Works

New Swan Autocomp (P) Ltd.

New Swan Enterprises

Nexteer Automotive India Pvt. Ltd.

NGK Spark Plugs (India) Pvt. Ltd.

NHK Automotive Components India Pvt. Ltd.

Nicks Auto Industries Pvt. Ltd.

Nipman Fastener Industries Pvt. Ltd.

Nippon Audiotronix Ltd.

Nippon Thermostat (India) Ltd.

Nissim India Pvt. Ltd.

Nitto Denko India Pvt. Ltd.

Norma Group Products India Pvt. Ltd.

NRB Bearings Ltd.

NTF (India) Pvt. Ltd.

O

Ocap Chassis Parts Pvt. Ltd.

Oerlikon Friction Systems (India) Ltd.

Oetiker India Pvt. Ltd.

Omax Autos Ltd.

Onassis Auto Ltd.

Orbit Bearings India Pvt. Ltd.

Oswal Castings Pvt. Ltd.

Owari Precision Products (India) Pvt. Ltd.

P

Pacco Industrial Corporation

Padmini VNA Mechatronics Pvt. Ltd.

Panalfa Autoelektrik Ltd.

Paracoat Products Ltd.

Paranjape Autocast Pvt. Ltd.

Paras Auto Industries

Parkash Automotive Industries (P) Ltd.

Pasio Aircon Pvt. Ltd.

Paul Components Pvt. Ltd.

Pavna Auto Engineering Pvt. Ltd.

Pee Aar Exim Pvt. Ltd.

Perfect Engine Components Pvt. Ltd.

Perfect Industries (India)

Perfect Polymers

Peter-Lacke India Pvt. Ltd.

Piano Presitel

Pinnacle Industries Ltd.

Plastic Omnium Auto Exteriors (India) Pvt. Ltd.

Polyplastics Industries (India) Pvt. Ltd.

Pooja Forge Ltd.

Poona Shims Pvt. Ltd.

Porwal Auto Components Ltd.

Power Industries

PPAP Automotive Ltd.

Prabha Engineering Pvt. Ltd.

Pranav Vikas (India) Pvt. Ltd.

Pravin Engineering Pvt. Ltd.

Precision Autowares Pvt. Ltd.

Precision Camshafts Ltd.

Precision Cups Pvt. Ltd.

Precision Engineering

Precision Tech Enterprises

Premier Plasmotec Pvt. Ltd.

Presco-Mec Autocomp Pvt. Ltd.

Pricol Ltd.

Pritika Industries Ltd.

Progressive Gear Industries (P) Ltd.

Propel Metaltech

PRS Permacel Pvt. Ltd.

Punch Ratna Fasteners Pvt. Ltd.

Punjab Bevel Gears Ltd.

Purofil Auto (India) Pvt. Ltd.

Pushkar Techno Private Ltd.

Q

QH Talbros Pvt. Ltd.

R

R.K. Profiles Pvt. Ltd.

RACL Geartech Ltd. (Formerly Raunaq Automotive Components Ltd.)

Radiant Complast Pvt. Ltd.

Radiant Polymers Pvt. Ltd.

Rajatdeep Overseas Pvt. Ltd.

Rajhans Pressings Pvt. Ltd.

Rajnish Industries Pvt. Ltd.

Rajsriya Automotive Industries Pvt. Ltd.

Ramkrishna Forgings Ltd.

Ramsays Corporation Pvt. Ltd.

Rane (Madras) Ltd.

Rane Brake Lining Ltd.

Rane Engine Valve Ltd.

Rane NSK Steering Systems Pvt. Ltd.

Rane TRW Steering Systems Pvt. Ltd.

Ranee Polymers Pvt. Ltd.

Rangamma Steels & Malleables

Rasandik Engg. Industries (I) Ltd.
Rawats International Pvt. Ltd.
RDH Auto
Remsons Industries Ltd.
Reydel Automotive India Pvt. Ltd.
Rico Auto Industries Ltd.
Rico Castings Ltd.
Right Tight Fastner Pvt. Ltd.
Rinder India Pvt. Ltd.
Ring Plus Aqua Ltd.
Rockman Industries Ltd.
Rolex Rings Pvt. Ltd.
Roop Automotives Ltd.
Roop Polymers Ltd.
Roots Industries India Ltd.
Rosmerta Autotech Pvt. Ltd.
Rotex Automation Ltd.
RPK India Pvt. Ltd.
RSB Transmissions (I) Ltd.
RSK Motors

S

S. M. Auto Engineering Pvt. Ltd.
S. S. Engineering Works
S.K. Spring Co.
SAC Engine Components Pvt. Ltd.
Sadhu Forging Ltd.
Sahil Industries
Sainik Spring Works
Saint Gobain India Pvt. Ltd.
Sakthi Auto Component Ltd.
Samarth Engg. Co. Pvt. Ltd.
Samco Auto (India) Pvt. Ltd.
Samson Industries
Sanatan Autoplast Pvt. Ltd.
Sandeep Metalcraft Pvt. Ltd.
Sanden Vikas (India) Pvt. Ltd.
Sandhar Technologies Ltd.
Sanjeev Auto Parts Manufacturers Pvt. Ltd.
Sankar Sealing Systems Pvt. Ltd.
Sanko Gosei JRG Automotive (I) Pvt. Ltd.

Sansera Engineering (P) Ltd.
Saraswati Industries
Sathya Auto Pvt. Ltd.
Sati Auto Components Pvt. Ltd.
Satyam Auto Components Ltd.
Saurat Auto-Tech Private limited
Sawalka Kel Pvt. Ltd.
Sea Hydrosystems India Pvt. Ltd.
Sebros Auto Pvt. Ltd.
Seema & Co.
Sekisui DLJM Molding Pvt. Ltd.
Sellowrap EPP India Pvt. Ltd.
Sellowrap Industries Pvt. Ltd.
Senior India Pvt. Ltd.
Sensing Technologies Pvt. Ltd.
SEP India Pvt. Ltd.
Setco Automotive Ltd.
Sharda Motor Industries Ltd.
Sheet Shapers
Shilpi Cable Technologies Ltd.
Shiroki Technico India Pvt. Ltd.
Shivam Autotech Ltd.
Shivani Locks Pvt. Ltd.
Shore Auto Rubber Exports Pvt. Ltd.
Showa India Pvt. Ltd.
Shree Amba Industries
Shree Shyam Global
Shriniwas Engineering Auto Components Pvt. Ltd.
Shriram Alpine Sales Pvt. Ltd.
C/o Shriram Automotive Products Ltd.
Shriram Foundry Ltd.
Shriram Pistons & Rings Ltd.
Sibar Autoparts Limited
Sigma Automotive Materials Pvt. Ltd.
Sigma Corporation (India) Ltd.
Sigma Freudenberg NOK Pvt. Ltd.
Sigma Moulds & Stampings Pvt. Ltd.
Silco Cables
Singhbhum Machinometal Pvt. Ltd.
Singla Forging
Sintex-BAPL Ltd.

SJS Enterprises Pvt Ltd
SKH Metals Ltd.
SKS Fastners Ltd.
Sober Auto Industries
SOGEFI MNR Filtration India Pvt. Ltd.
Somic ZF Components Ltd.
Sona BLW Precision Forgings Ltd.
Sona Koyo Steering Systems Ltd.
Soni Auto & Allied Industries Ltd.
Spaco Technologies (India) Pvt. Ltd.
Special Engineering Services Ltd.
Special Tools Pvt. Ltd.
Spectra products Pvt. Ltd.
Spicer India Pvt. Ltd.
SPM Autocomp Systems Pvt Ltd.
Spun Micro Processing (P) Ltd.
SSV Valves
Standard Radiators Pvt. Ltd.
Star Circlips & Engineering Ltd.
Star Engineers (India) Pvt. Ltd.
Steel Strips wheels Ltd.
Steelbird International
Steriware Plastic Products Pvt. Ltd.
Sterling Tools Limited
Stork Auto Engineering Pvt. Ltd.
Stork Rubber Products Pvt. Ltd.
Stumpp Schuele & Somappa Springs Pvt. Ltd.
Subros Ltd.
Sudisa Foundry (P) Ltd.
Sujan Cooperstandard AVS Pvt. Ltd.
Sunbeam Auto Pvt. Ltd.
Sundaram Auto Components Ltd.
Sundaram Brake Linings Ltd.
Sundaram Clayton Ltd.
Sundaram Industries Pvt. Ltd.
Sundram Fasteners Ltd.
Sunpac Auto (India) Pvt. Ltd.
Sunstar Precision Forge Ltd.
Sunvisors India Pvt. Ltd.
Super Circle Auto Ltd.
Super Nova Auto Industries

Super Seals India Ltd.

Supercircle Pvt. Ltd.

Suprajit Engineering Ltd.

Supreme Treon Pvt. Ltd.

Suraj Components Pvt. Ltd.

Suraj General Engineers (P) Ltd.

Surya Springs

T

T.K. Precision Pvt. Ltd.

T.K.W. Fasteners Pvt. Ltd.

Takata India Pvt. Ltd.

Talbro's Automotive Components Ltd.

Talbro's Cork Products Pvt. Ltd.

Talbro's Engineering Ltd.

Tata Autocomp Systems Ltd.

Tata Toyo Radiator Ltd.

Taylor Rubber Pvt. Ltd.

TE Connectivity India Pvt. Ltd.

Tech Auto Pvt. Ltd.

Technico Industries Ltd.

Technocrat Connectivity Systems (P) Ltd.

Technosystems

Teksons Pvt. Ltd.

Tenneco Automotive India Pvt. Ltd.

Terminal Technologies (I) Pvt. Ltd.

Tespa Tools Pvt. Ltd.

Texspin Bearings Ltd.

The Hi-Tech Gears Ltd.

The Automotive Research
Association of India

The Supreme Industries Ltd.

Tightwell Fastners

Tosy Auto Products

Toyoda Gosei South India Pvt. Ltd.

Toyota Boshoku Automotive
India Pvt. Ltd.

Toyota Industries Engine India Pvt. Ltd.

Toyota Kirloskar Auto Parts Pvt. Ltd.

Toyotetsu India Auto Parts Pvt. Ltd.

Track Components Ltd.

Transvahan Technologies India Pvt. Ltd.

Trelleborg Automotive India Pvt. Ltd.

Trelleborg Vibracoustic (India) Pvt. Ltd.

Trigno Engineering Pvt. Ltd.

Trim India Pvt. Ltd.

TRW Sun Steering Wheels Pvt. Ltd.

TSMPR Theepan Gaskets and Filters
Industries Pvt. Ltd.

TT Electronics Sensing And Control
India Pvt. Ltd.

Tube Investments of India Ltd.

Turbo Energy Pvt.Ltd.

TVS Educational Society

TVS Infotech Ltd.

TVS Logistics Services Ltd.

Twenty First Century Auto Locks Pvt. Ltd.

U

Ucal Fuel Systems Ltd.

Ucal Products Pvt. Ltd.

Ukay Metal Industries Pvt. Ltd.

UMC Auto Industries Pvt. Ltd.

Uni Deritend Ltd.

Unitech Machines Ltd.

Universal Wire Forms

Usha International Ltd.

USUI Susira International Private Ltd.

V

V. S. Enterprises

Vaish Industries

Valeo India Pvt. Ltd.

Vanaz Engineers Ltd.

Varroc Engineering Pvt. Ltd.

Varroc Polymers Pvt. Ltd.

VE Commercial Vehicles Ltd.

Vel Tech Dr. RR & SR Technical
University

Vibrant Auto Components Pvt. Ltd.

Vibromech Engineers and Services Ltd.

Victor Reinz India Pvt. Ltd.

Victoria Tool Engineers (P) Ltd.

Vijayshree Autocom Ltd.

Vikrant Auto Suspensions

Vinayaka C.N.C. Centre (P) Ltd.

Vinko Auto Industries Ltd.

Viral Engineers

Vishwakarma Automotive Pvt. Ltd. - II

VNM Polymers Pvt. Ltd.

Voith Turbo Pvt. Ltd.

W

WABCO India Ltd.

Wahi Sons Pvt. Ltd.

Watson & Chalin India Pvt. Ltd.

Western Auto Spares

Western Thomson (India) Ltd.

Wheels India Ltd.

Wings Automobile Products (Pvt.) Ltd.

Wire Rings

Wriston Elastomers (P) Ltd.

Y

Yapp India Automotive Systems Pvt. Ltd.

Yashka Stampings

Yazaki India Pvt. Ltd.

Yeshshree Press Comps. Pvt. Ltd.

York Transport Equipment
(India) Pvt. Ltd.

Yoshama And Company Pvt. Ltd.

Yugal Precision Pvt. Ltd.

Z

Zenith Forge Pvt. Ltd.

Zenith Industries

ZF India Pvt. Ltd.

ZF Steering Gear (India) Ltd.

Ziel International

**List of members as on 31 March 2017*



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Automotive Component Manufacturers
Association of India

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Southern Region

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20, Haddows Road,
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Chennai 600 006,
Tamil Nadu
Tel: +91 44 2833 0968
+91 44 2833 0949
Fax: +91 44 2833 0590
E-mail: acmasr@acma.in

Southern Region

Zonal Office
(Karnataka & Hosur)
Shop NO. 1, Commercial Complex,
National Games Village,
Koramangala, Bangalore 560 047
Karnataka,
Tel: +91 80 2570 2855
Fax: +91 80 4093 9689
E-mail: acmakh@airtelmail.in

Western Region

Office No. C,
10th Floor, Godrej Eternia "C",
Old Mumbai-Pune Highway,
Wakdevadi, Shivaji Nagar,
Pune 411 005
Maharashtra
Tel: +91 206606 1219
Telefax: +91 20 6606 1220
E-mail: acmawr@acma.in

Western Region

Zonal Office
(Mumbai)
80, Dr. Annie Besant Road,
Worli, Mumbai 400 018
Maharashtra
Tel: +91 22 2493 3507
2497 5877, 2498 6527
Fax: +91 22 2493 6527
E-mail: acmawr@acma.in

Western Region

Zonal Office
(Gujrat)
801 "Matrix",
Near Vodafone House,
B/H Divya Bhaskar,
Corporate Road,
Prahladnagar,
Ahmedabad 380015.
Gujrat, India.
Tel No: 079-40053306
E-mail: acmawr@acma.in