

ACMA

Automotive Component
Manufacturers Association of India

CAPTURING THE GLOBAL OPPORTUNITY
THE NEXT IMPERATIVE FOR INDIAN AUTO COMPONENT INDUSTRY



A N N U A L R E P O R T 2 0 1 3 - 1 4



The Executive Committee of the
Automotive Component Manufacturers Association of India is pleased
to present its

ANNUAL REPORT
2013-14

ACMA

Automotive Component Manufacturers Association of India



Capturing the Global Opportunity
The Next Imperative for the Indian Auto Component Industry



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President's Message

Dear Friends,

Let me begin by thanking the ACMA membership for reposing faith in me and providing me the opportunity to serve the industry during these very challenging times. No doubt, the global and domestic macro-economic environment, over the last couple of years, has been a dampener for the Indian automotive industry; however I am very proud of the fact that the component industry in India has been able to keep its head above water.

During these trying times, each one of us have had to go back to the drawing board, revisit our strategies, reorient our organisations, streamline our processes and revitalise our companies to gear up and deal with the challenges. The going has been tough for the Indian auto-component industry but I believe, with this, we have evolved into much stronger entities with better capabilities to be competitive. In fact, there is a sense of satisfaction with which I can state that as an industry we have displayed great resilience in these trying times and most of our members have delivered reasonable results. This period has made us look at international markets in a much more serious way and the need to become an integral part of a global auto supply chain has become ingrained as our strategic intent. I am confident that India is poised to garner a much larger share of global opportunities in the days to come.

There is no doubt that India has all the ingredients to become one of the leading players in the global auto-component space. We have a vast pool of engineering skill and knowledge supported by the power of innovation and

entrepreneurship. The domestic market, which is going through a cyclical slump, is bound to recover and gain momentum. However, in the immediate future, there is still a lot of ground to be covered before one sees resurgence in the industry.

The Indian Auto-Component Industry

The unfavourable economic conditions, internationally as well as in the domestic market, led to an atmosphere of volatility, uncertainty, high inflation, growing input costs, fluctuating exchange rates and relatively high interest rates that severely daunted the automotive industry's performance in India. Estimates from SIAM suggest that during 2013-14, the total production of automobiles, including tractors, increased by only 4.5% to 22.17 million units as compared to 21.22 million units in 2012-13. Unfortunately, given the prolonged demand slump, passenger car production fell for the second consecutive financial year reducing by 4.9% from 3.23 million units in 2012-13 to 3.07 million units in 2013-14. The Commercial Vehicle segment continued to be the worst hit as it posted a decline of 16% from 8.32 lakh units in 2012-13 to 6.98 lakh units in 2013-14. Two-wheelers and Farm tractors were the only segments with positive growth. While the former grew by 7.2%, the latter saw a very good year with 20% growth in 2013-14 compared to 2012-13.

In this backdrop, the auto-component sector in India witnessed a 2% reduction in total turnover during 2013-14. However, exports grew by 5.4% to USD 10.2 billion in 2013-



14 helping offset some of the drop in domestic demand. The ability to steadily grow exports at a time when market conditions are not very supportive is a reflection of the growing position of the Indian auto-component industry in global terms. It is now becoming even more imperative for domestic companies to become an integral part of global supply chains, not only to grow, but also to hedge against market downturn in any specific region.

The global automotive landscape is also witnessing unprecedented changes, which are not apparent today as these are all in development stage and will come to the fore in next 5-10 years. The various changes, driven by the need for fuel efficiency, safety and concern for the environment will not be sequential, and may well create a point of inflection for the automotive industry in the world as well as in India. It is imperative for the Indian auto-component industry to gear-up to these changes today to be able to deal with the developments expected in the future.

At ACMA we have continually strived to keep our members abreast of the emerging global trends as also help them

harness newer market opportunities. Broadly, our efforts were focused around four major domains – public policy advocacy, brand building and business development, enhancing internal efficiencies and knowledge initiatives.

Public Policy Advocacy

The prevailing economic impasse requires a strong government intervention to boost investments and sentiments across markets in India. With a new government now in place, expectations are high for a growth oriented policy environment.

In the recent announcement of the Union Budget, the Government has taken a pragmatic approach of encouraging private investments while supporting social and infrastructure sectors. We expect the new government to provide an environment conducive for growth and reviving the investment climate, particularly in the automotive sector. Further, we have actively worked with the Government and provided inputs pertaining to our sector for the new Foreign Trade Policy, which is on the anvil. I hope the final policy

framework will be a step towards long-term stable trade policies and provide the requisite export incentives that are critical for sustaining the industry in these times of global challenges.

In the year gone by, through our sustained efforts with the government, we have managed to take a positive step towards not only preventing counterfeits in the after-market but also set in rolling formulation of a process for mandating standards for such products. The Ministry of Road Transport and Highways and the Bureau of Indian Standards (BIS) have initiated work on this aspect. We continue to work with the Government in helping formulate the fuel policy, emission norms, end of life of vehicles and vehicle recall, and different elements of safety standards. That apart, we continued to effectively engage with the Government on several issues critical to the industry including WTO, FTAs, technical standards, automotive regulations, and challenges of the MSME.

Our intense engagement with the state governments has also started to pay dividends as evidenced in the recent announcement of the 'Automobile and Auto Components Policy 2014' by the Tamil Nadu Government, incorporating several of ACMA's recommendations. In a similar vein, we are proactively engaged with other state governments such as Karnataka, Punjab, Haryana, Gujarat and Rajasthan, to name a few.

Brand Building and Business Development

At ACMA, we are channelling significant energy on building a strong 'made in India auto components with a distinct value proposition' brand at a macro level as well on a people-to-people basis. While on one hand, we have facilitated the participation of our members in several international trade shows and exhibitions; on the other, we have undertaken several delegations comprising our members to different countries to establish strong networks with global counterparts and enhance members' understanding on newer market opportunities.

India's largest auto event – the Auto Expo organised by ACMA together with CII and SIAM was conducted successfully in February 2014 with component suppliers and the automobile manufacturers, for the first time, at different locations. Importantly, with the segregation, the quality of footfalls was superior at the components show and even senior management of most companies including OEMS managed to spend quality time with the suppliers. Through

the Expo we stressed on propagating the three main themes of technology, globalisation and quality that will drive the Indian auto-component industry forward.

ACMA continues to be actively engaged with its counterparts the world over. In fact, there are 28 active MoUs with our counterparts that keep us updated on automotive trends and trade shows in different parts of the world. During 2013-14, we signed a MoU with ACA (Auto Care Association of USA) at the AAPEX show in Las Vegas to enable India's presence in the US aftermarket and with MAJOSZ the Hungarian Association of Auto Component Industry.

ACMA has been making concerted efforts to explore business opportunities for Indian auto component manufacturers in the overseas, therefore for the first time ACMA along with the support of IPO Forum organised Tech Expo' with 5 global OEMs in USA with an objective to showcase the growing capabilities of the Indian auto component industry.

There was also active group participation in international fairs such as the Korea Automotive Industry Exhibition (KOOA) show, IAA India Day at Germany, AAPEX 13' at Las Vegas, Automechanika Dubai, Automechanika South Africa, Automotive Parts Procurement Exhibition with JETRO of Japan at Chennai and the INABIKA (INAPA) show in Jakarta.

There were successful CEO missions mounted to Indonesia, Vietnam, China, UK and Mexico. Each of these missions had effective interactions and visits to international OEMs and Tier-1 suppliers.

Enhancing Internal Efficiencies

ACMA has always worked on raising the bar for its members through initiatives related to technology, quality and productivity.

'ACMA Centre for Technology' (ACT), established in year 1989, continues to focus on providing expert guidance to members by improving their manufacturing competitiveness, enhancing their quality standard and improving productivity and profitability through various interventions. The cluster programs through this framework have evolved into major tools for transformation. This has further been expanded to focus on improving capabilities of Tier 2 and Tier 3 companies. I urge you to read the detailed annual review, where the different programs for improving efficiencies of member companies have been detailed out. These programs are carried out across functions and regions.

Establishing highest standards of operational quality amongst members has been at the forefront of ACMA's efforts. Today,

amongst the members, 632 have ISO9000 certification, 530 have TS16949 certification, 18 have QS9000 certification, 273 have ISO14001 certification, 154 have OHSAS18001 certification and 14 have won the coveted Deming Prize.

As a special initiative, during the Auto Expo 2014, ACMA and SIAM jointly launched AutoDX, an EDI platform to integrate OEMs and Suppliers on a common data exchange platform. This initiative will increase the supply chain efficiency, reduce transaction costs for both OEMs and suppliers and in the long run, provide end-to-end tracking and traceability of goods across the supply chain. AutoDX has been very well received by both ACMA and SIAM members

Knowledge Initiatives

During 2013-14, ACMA continued to engage renowned global knowledge partners to study specific aspects of automotive business and value chain. Importantly, with a view to enhance the positioning in the Chinese market, ACMA has commissioned a study for deeper insights into the Chinese auto component market, which includes potential and product-wise cost benchmark. Further, the Knowledge Partner for the study is expected to set up network opportunities for our member with Chinese OEMs and Global OEMs in China. ACMA together with SIAM has initiated a study to understand the business dynamics of the 'ferrous-casting segment' of the component industry while another ACMA –IMTMA joint study, to conclude soon, is focused on understanding the challenges in the Machine Tool industry. ACMA, SIAM together with the Department of Heavy Industry are recalibrating the Automotive Mission Plan with 2026 as the horizon. I am confident that the component industry will tremendously benefit from the wealth of intelligence created through these knowledge engagements.

Conclusion

As I write, there are harbingers of hope all around. Foreign investments into Indian stock markets have picked up signaling a revival in investor confidence. The US economy is gradually recovering and the IMF estimates improved global economic growth at 3.6%.

The automotive industry is also showing early signs of recovery in India. In US and Europe, passenger car sales have grown by decent rates since May 2014. These are very early signals and they give me a sense of optimism for the year ahead. However, given the deep-rooted problems, I believe the recovery will be gradual. What I am sure of is that the worst is behind us and we need to now prepare ourselves

for the next growth cycle.

ACMA with its proficient secretariat will continue to play an active role in the sector's recovery. Last year, the execution across different activities, despite a very challenging year, was impeccable. I am also pleased to mention that the ACMA Secretariat continues to be ISO 9001: 2008 certified. Our Regions have contributed significantly by extending their reach to smaller hubs to improve the capability of the Tier 2s/3s by conducting dedicated local events. This increased penetration will be essential in the future to build supply chain efficiencies across ACMA's value chain.

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 end my stint as President after a challenging yet fulfilling year, I would like to thank all our members for their support and their conviction in me. 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.

I am confident that ACMA and the entire Auto industry will soon be out of the difficult times and embark on a journey of growth, further strengthening its name in the global landscape.

Best Wishes

Harish Lakshman

ACMA - ABOUT THE ORGANISATION

Introduction

Established in 1959, the Auto Component Manufacturers' Association (ACMA) has a long and illustrious history as the apex industry body fostering the collective interests of Indian auto component manufacturers. ACMA's charter is to develop a globally competitive Indian Auto Component Industry and strengthen its role in national economic development. It is also actively promotes business development through international alliances.

Over the years, the organisation has been supporting the auto-component industry by engaging with the Government and Government agencies to create a supportive policy environment; organising and participating in trade shows and international missions to help members with business development and enhance the brand value of the Indian auto-component industry in the global space; formulating and executing interventions to improve the efficiencies of member companies through adoption of newer technology, global quality systems and processes for enhanced productivity; and establishing networks and syndicating research to establish a continuous flow of updated information and in-depth global industry related knowledge for member companies. This way, ACMA has been a vital catalyst that has propelled the Indian auto-component industry into a new era of growth.

Membership

Today, ACMA has over 700 companies as members, representing around 85% of the entire auto-component sector's turnover in India. Its membership comprises of companies that are spread across India that either supply directly to OEMs or Tier1 and Tier2 companies.

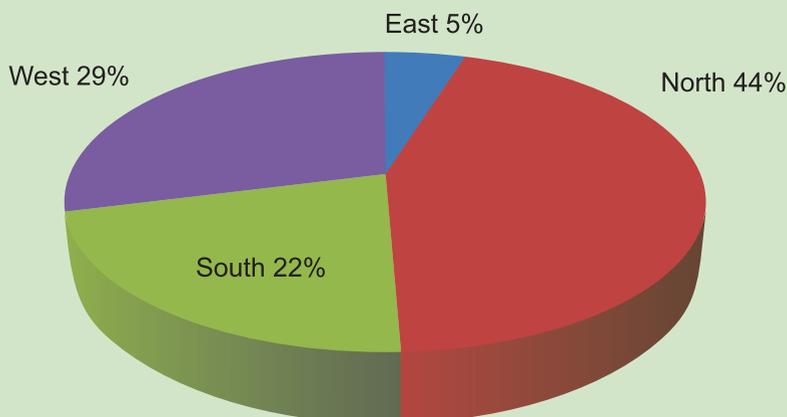
ACMA MEMBERSHIP (As of AUG 2014)

Regions	Membership
Eastern Region	34
Northern Region	312
Southern Region	152
Western Region	203
Total	701

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),

ACMA MEMBERS - REGIONAL PRESENCE (INDIA)



Automotive Research Association of India (ARAI), Indian Machine Tools Manufacturers Association (IMTMA), National Automotive Testing and R&D Infrastructure Project (NATRIIP), Automotive Skill Development Council (ASDC) and other Association 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 (BIS)
- 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-Netherland 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.

MOU Partners

COUNTRY	ORGANISATION
Australia	Federation of Automotive Products Mfrs. (FAPM)
Brazil	Brazilian Association of Automotive Components Manufacturers (SINDIPECAS)
Canada	Automotive Parts Mfrs. Assn.(APMA)
Egypt	Egyptian Auto Feeders Association (EAFA)
France	Federation des Industries des Equipments pour Vehicules (FIEV)
Germany	ACMA-Messe Frankfurt-Trade Fairs
Germany	Fraunhofer
Germany	Verband der Automobilindustrie e. V. (VDA)
Hungary	Association of Hungarian Automotive Component Manufacturers
Iran	Iranian Autoparts Manufacturers Association (IAPMA)
Italy	Unione Industriale Torino (UIT)
Japan	Japan Auto Parts Industries Assn. (JAPIA)
Korea	Korea Auto Industries Coop. Assn. (KAICA)
Korea	Gunsan City, Republic of Korea
Malaysia	Malaysian Automotive Comp. Parts Mfrs. (MACPMA)
South Africa	National Ass. of Automotive Component & Allied Mfrs. (NAACAM)
Spain	Spanish Association of Manufacturers of Equipments and Parts for the Automobile Industry
Sweden	FKG - Fordonskomponentgruppen AB
Thailand	Thai Auto-Parts Manufacturers Association (TAPMA)

Tunisia	L' Association Tunisienne des Fabricants de Composants Automobiles (UTICA/ATFCA)
Turkey	TAYSAD Association of Automotive Parts & Components Manufacturers
UK	The Society of Motor Mfrs. & Traders Ltd. (SMMT)
USA	Motor & Equipment Manufacturers Assn. (MEMA)
USA	Auto Care Association
USA	Original Equipment Suppliers Association (OESA)
USA	SAE International
Uzbekistan	Uzbek Assn. of Automobile Industry Ent. (UZAUTOSANOAT)

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 processes across the secretariat have adopted best quality practices, and ACMA is an ISO 9001-2008 institution.

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

OFFICE BEARERS – 2013-14



PRESIDENT

Mr Harish Lakshman
Managing Director
**Rane TRW Steering
Systems Ltd.**
Chennai



VICE PRESIDENT

Mr. Ramesh Suri
Chairman
Global Autotech Ltd
New Delhi



NORTHERN REGION

Mr. Nirmal K. Minda
Chairman & Managing Director
Minda Industries Ltd.
Gurgaon



WESTERN REGION

Mr. Sandeep Balooja
President - Group Business Development
Anand Automotive Ltd.
Pune



SOUTHERN REGION

Mr. Arvind Balaji
Joint Managing Director
Lucas-TVS Ltd.
Chennai



EASTERN REGION

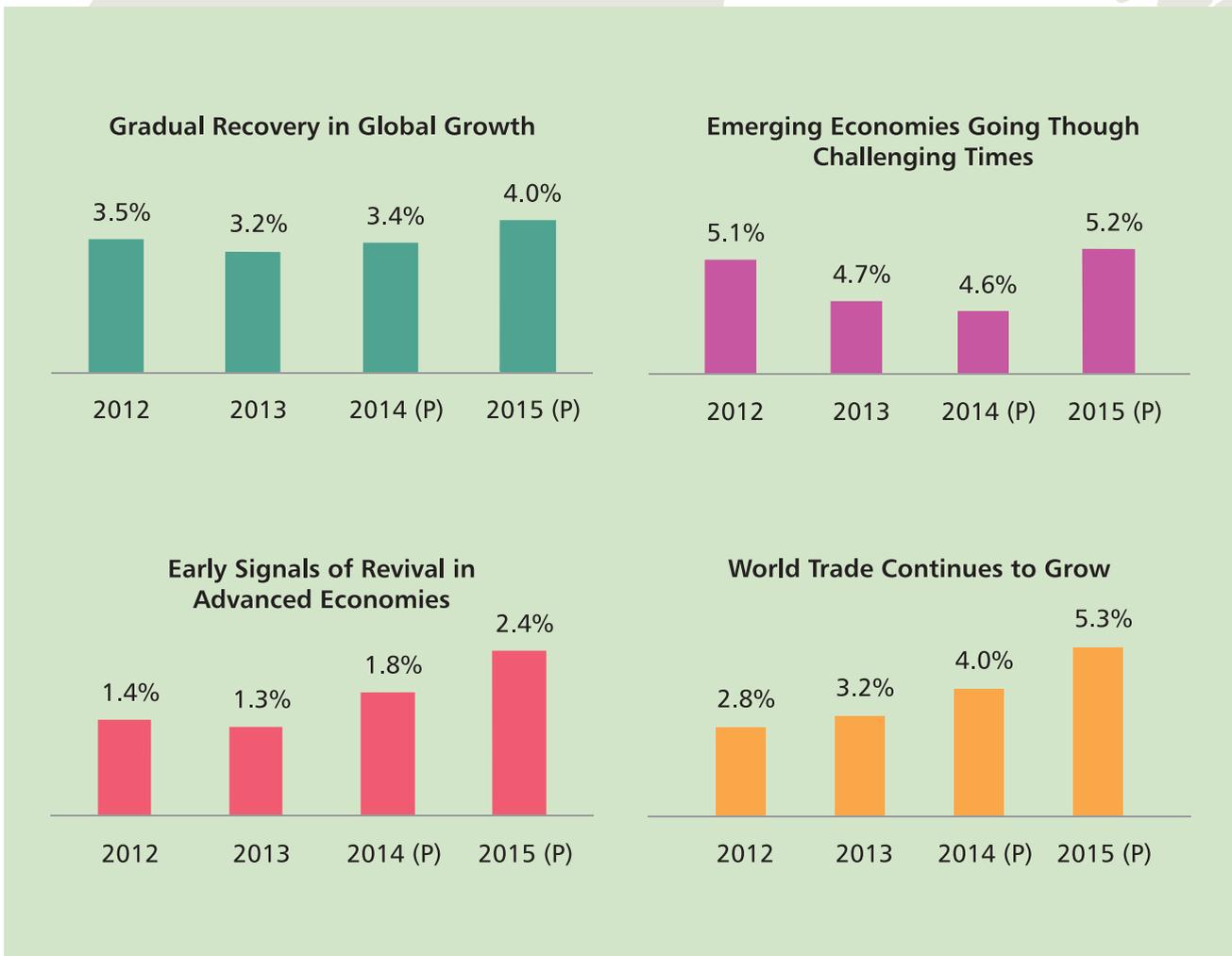
Mr. Killoi Kamani
Managing Director
Samarth Engineering Co. Pvt. Ltd.
Jamshedpur

THE BUSINESS ENVIRONMENT

Global Economy

World economic growth reduced from 3.5% in calendar year (CY) 2012 to 3.2% in CY2013 with growth in advanced economies reducing from 1.4% in CY2012 to 1.3% in CY2013. Importantly, emerging economies witnessed reduction in growth from 5.1% in CY2012 to 4.7% in CY2013.

a reversal of recent risk spread and volatility compression. Global growth could be weaker for longer, given the lack of robust momentum in advanced economies despite very low interest rates and the easing of other brakes to the recovery. In some major emerging market economies, the negative growth effects of supply-side constraints and the tightening



Global growth is expected to rebound from the second quarter of 2014, as some of the drivers underlying first quarter weakness, such as the inventory correction in the United States, should have only temporary effects, and others should be offset by policies, including in China. But the first-quarter setback will only be partially offset.

Downside risks remain a concern. Increased geopolitical risks could lead to sharply higher oil prices. Financial market risks include higher-than-expected U.S. long-term rates and

of financial conditions over the past year could be more protracted.

In many advanced and emerging market economies, structural reforms are urgently needed to close infrastructure gaps, strengthen productivity, and lift potential growth.

With somewhat stronger growth expected in some advanced economies next year, the global growth projection for CY2015 remains at 4%.

The Indian Economy

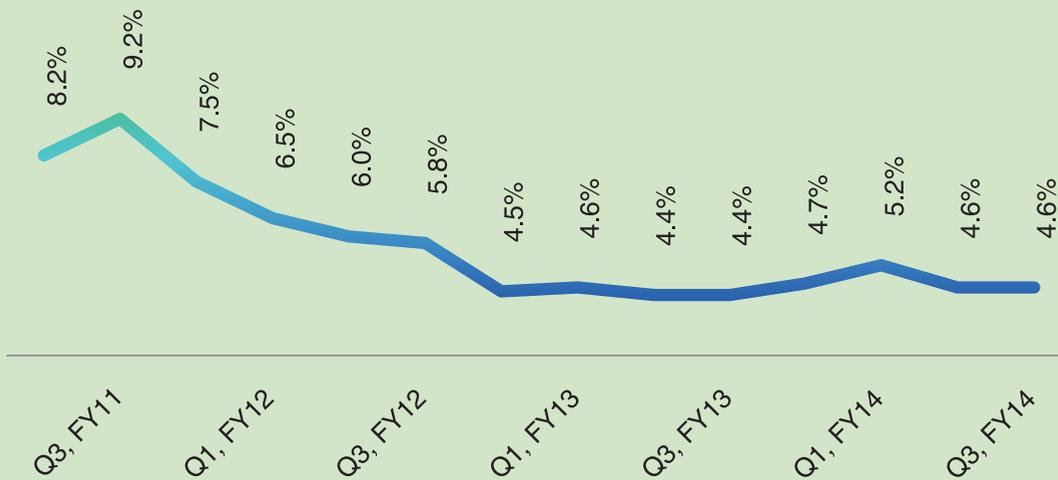
India's growth story has been badly hampered in the last 3 years with eight successive quarters of around 5% growth till the end of Q4, 2013-14. In 2013-14, the economy grew by a paltry 4.7% on the back of a low 4.5% growth in 2012-13.

Consumer price inflation averaged 9.8% in 2013-14, while wholesale price inflation averaged 5.9%. While the rates

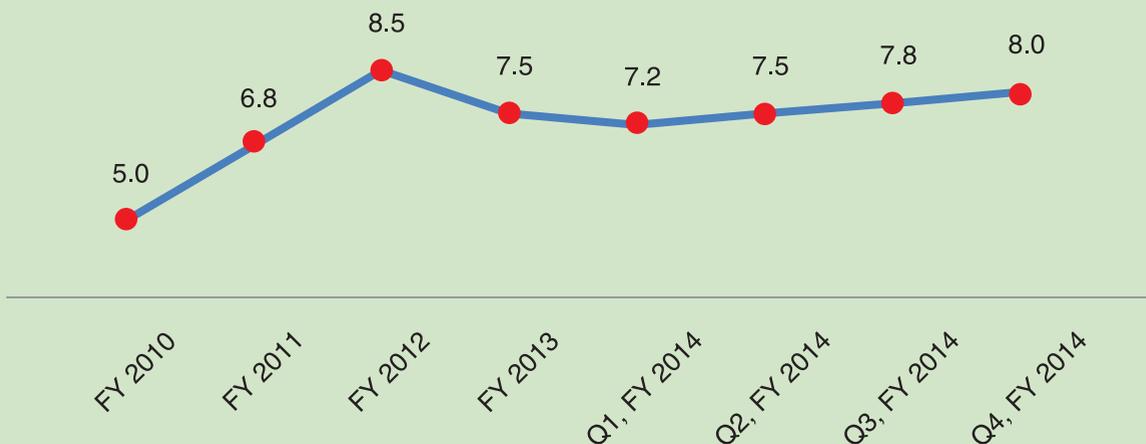
haven't gone up significantly, these are still at levels where the RBI had to maintain a tight monetary policy resulting high levels of interest rates.

The economic outlook is challenging, but there are signs that the worst is over – industrial growth has recovered to 3.4% in April 2014, which is the highest in the last 13 quarters; India's foreign exchange reserve swelled up to USD 314.922 billion as on 20th June 2014 from as low as USD 275 billion

India's Dramatic Economic Slowdown



Interest Rates (Repo Rate - %) remains firm



Export (USD bn) Growth has stagnated



Exchange Rate (INR/USD) Recovered Slightly but Still Under Pressure



during Sep 2013, driven by robust inflow of dollar into the economy through foreign institutional as well as foreign direct investment; CPI based inflation reduced to 8.1% in July 2014

demand and government action opens some structural bottlenecks that have impeded industry and investment.

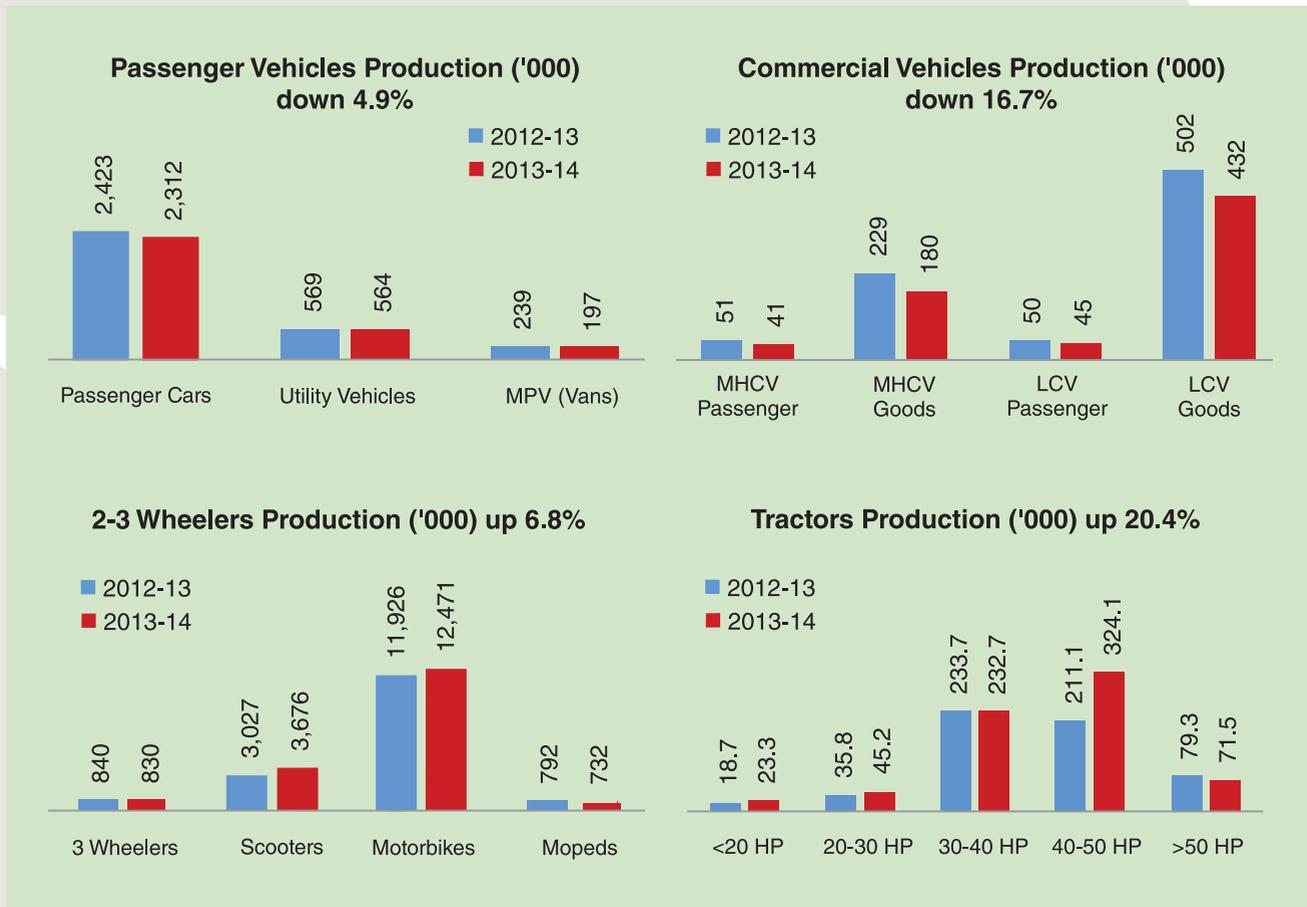
Asian Development Bank (ADB) estimates suggest that the economic downdraft of recent years appears to have calmed, and GDP growth in 2014-15 is expected to inch upward by 5.5% on improved performance in industry and services. In 2015-16, economic growth is expected to pick up to 6.0%, as a speeding up in advanced economies bolsters external

The Indian Automobile Industry

In CY2013, global automotive sales stood at a record 85.4 million vehicles, which was a growth of 3.9% over the previous year. This growth was primarily driven by China, USA and UK, which collectively account for 47% of the global automotive market

For the Indian automobile market, 2013-14 was a very challenging year. The year ended with a meagre production growth of 4% (excluding tractors). However, industry production volumes(excluding tractors and two wheelers) de-grew by 7.2% over the previous year. This is the worst ever de-growth since 1975-76. Every segment of the auto industry, except Pik-Ups, LCVs(2 to 3.5T GVW) and two wheelers, witnessed lower production in 2013-14

rates and slowing down of investment in manufacturing, have adversely impacted the growth of the auto component industry. The turnover of the auto component industry stood at Rs.2,11,765 crores (USD 35.13 billion) for the period April 2013 to March 2014, registering a decline of 2% over the previous year and a CAGR of 14% over the last six years. This data represents the entire supplies from the auto component



After a period of rapid growth post the global economic crisis in 2008, there has been a slowdown since 2011-12, with turnover actually reducing in 2013-14

The silver lining has been the 20.4% growth in agricultural farm equipment or tractor segment. Also, it does seem that the industry has bottomed out. In the month of June 2014, passenger car sales recorded 11.2% growth. M&HCVs recorded positive growth of 2.5% after 9 quarters of de-growth, while two-wheelers grew by 13%. And, the positive trend has continued in July 2014

The Indian Auto Component Industry

2013-14 has been one of the most challenging for the auto-component industry in India – flagging vehicle sales, high capital costs, high interest rates, fluctuating exchange

industry to the on-road and off-road vehicle manufacturers and the aftermarket in India as well as overseas from ACMA member and non-member companies.

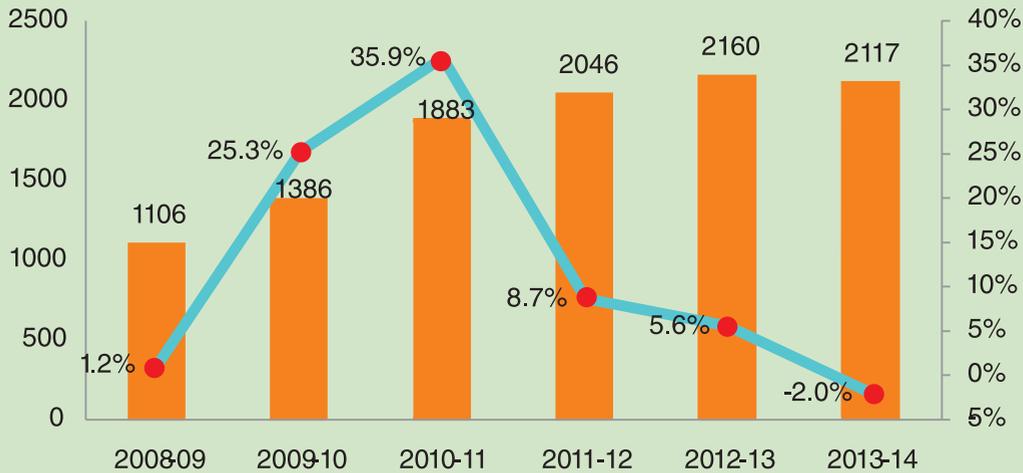
However, the auto component industry has used the slowdown as an opportunity to develop internal capabilities to meet the evolving needs of customers who look for value and features across vehicle segments. It has been constantly restructuring itself by adopting lean practices, mitigating risks and exploring adjacent markets such as aerospace, defence and railways to leverage better prospects.

The new government has recognised the potential and the need for revival and has put in place certain measures for the industry such as allowing 49% FDI in defence sector which

will soon open doors for the component makers. Extension of the excise duties till the end of the year has been well received by the auto industry at large. Moreover, with the Government's focus on infrastructure and skill development,

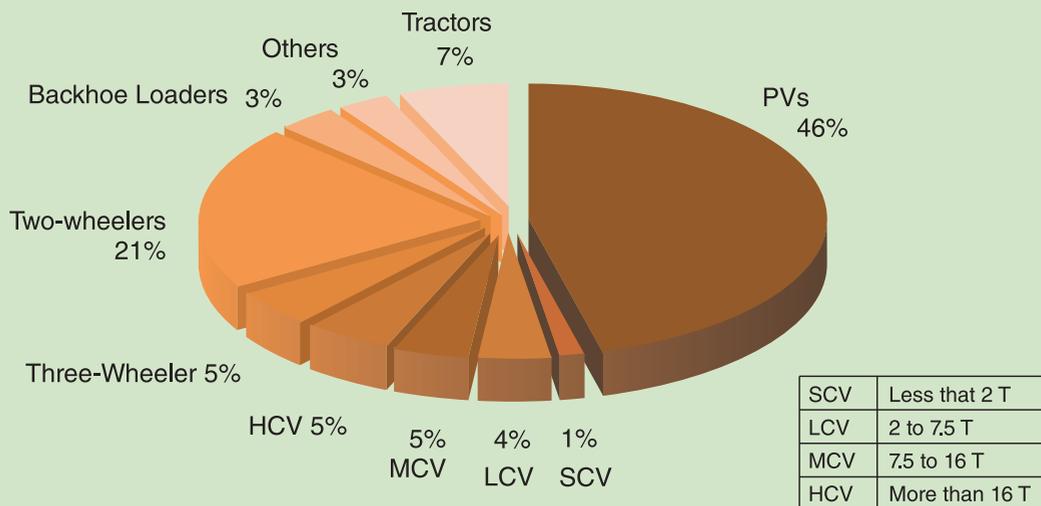
scaling-up of the MSME sector and overall measures to sustain growth, will go a long way in attracting investments and help to facilitate the growth tangent for the industry.

Auto Component Turnover (Rs.Cr) & Growth - CAGR 14%

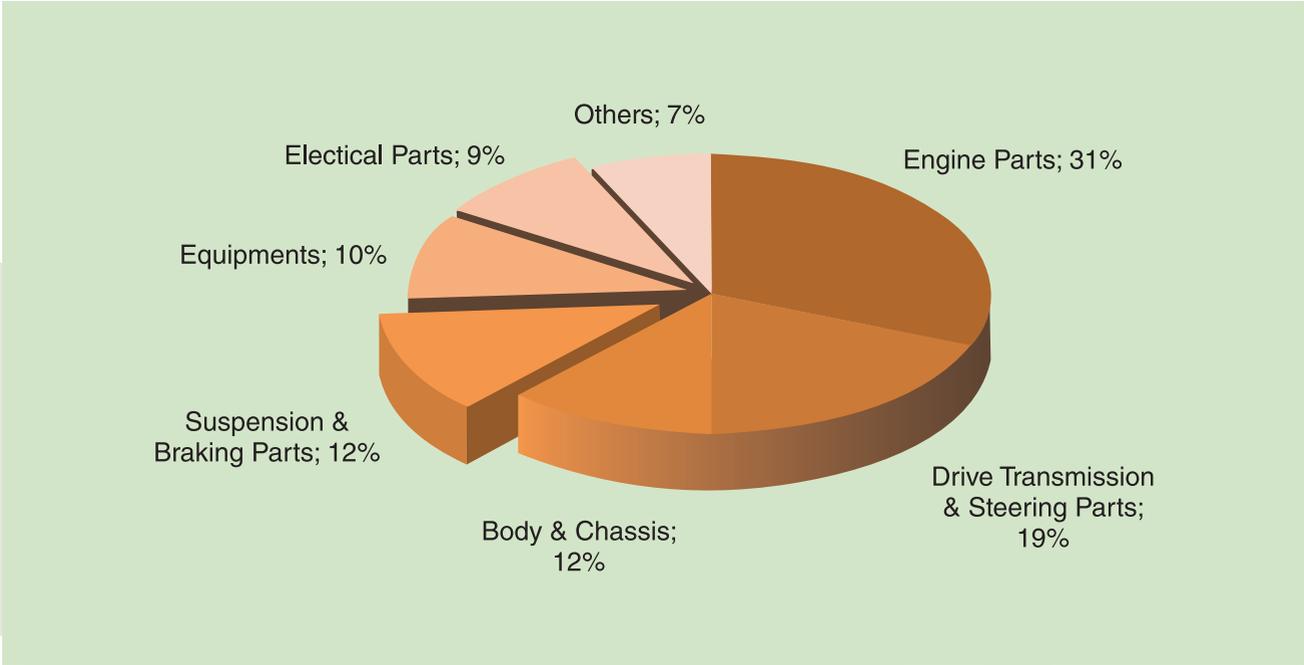


(Turnover includes supplies to OEMs, aftermarket sales and exports)

Auto Component Usage by OE segment in India



(OEMs consumption includes locally produced Components and Imports)

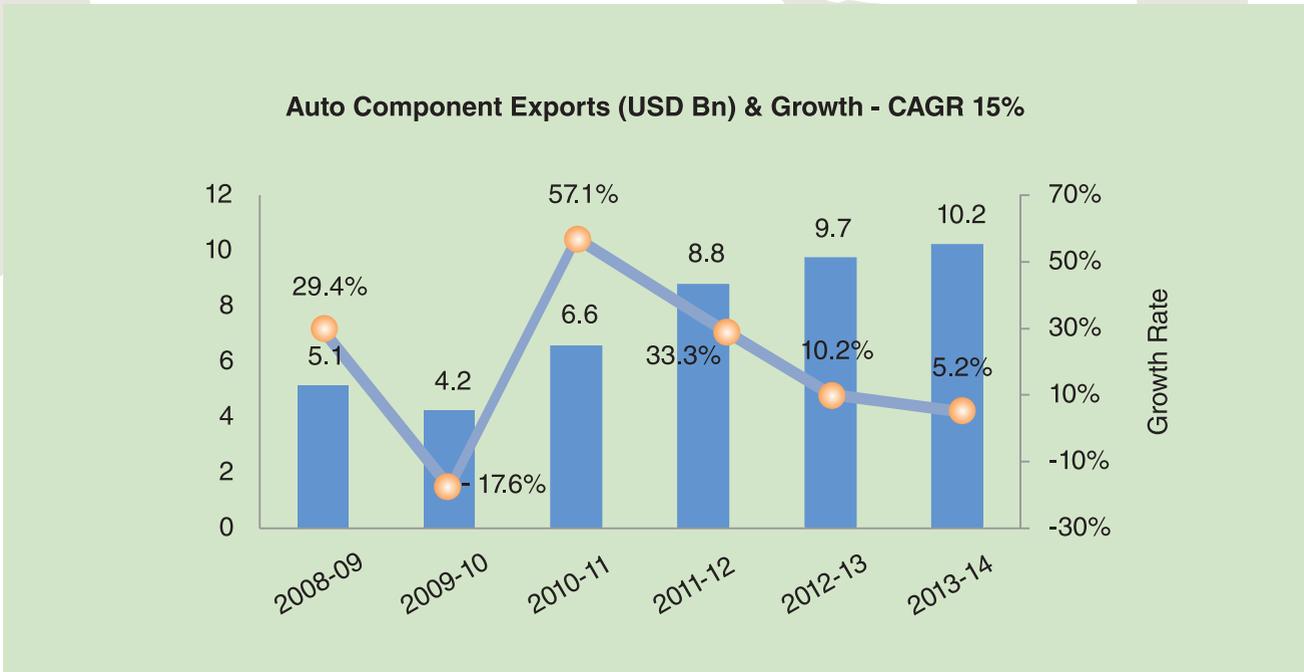


The sector continued to produce a wide product range that extended right across various elements of the component basket

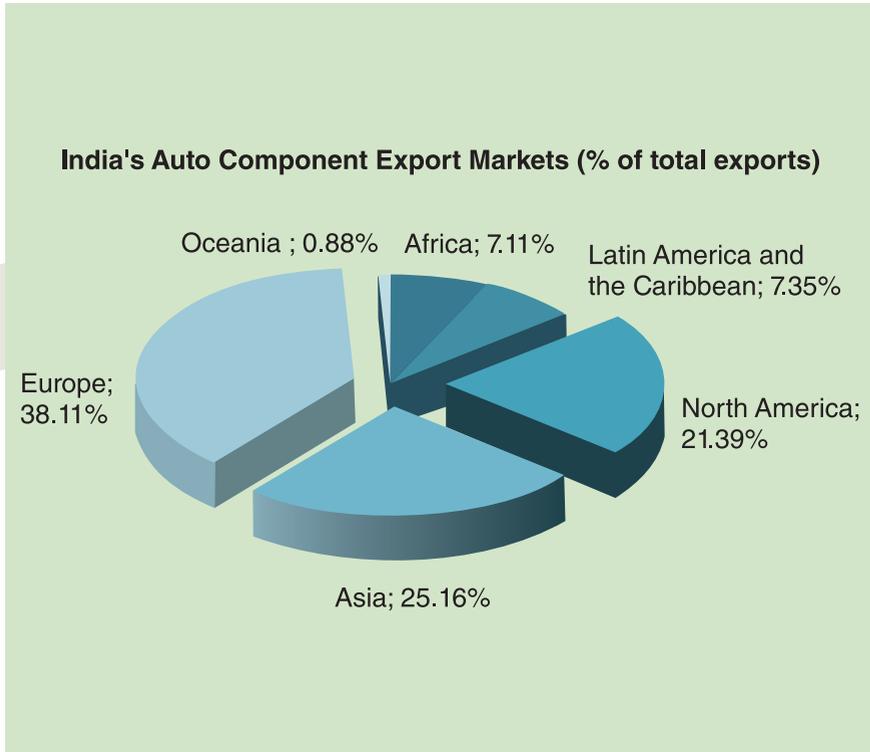
Exports

Exports by the Indian auto component industry scaled from USD 5.1 billion in 2008-09 to USD 10.2 billion in 2013-14, at a compound annual growth rate of 15% over the last 6 years. Today, the industry exports to more than 160 countries which has been growing at 15 percent per annum over the past six years and currently accounts for 29 percent of the industry turnover.

Drive train, engine and electrical parts have mainly driven export growth. India has started to emerge as a global hub for small engines as these are increasingly being manufactured in India for exports. Major customers for Indian exports are OEMs or tier-1 suppliers.



The industry was successful in continuing to tap into global markets and the steady growth in exports continued



Share of Exports from top 10 countries (%)

USA	20.50
Germany	8.08
UK	6.16
Turkey	5.20
Italy	4.93
Brazil	4.03
Thailand	3.41
France	3.32
China	3.04
UAE	2.77

Europe continues to be the leading destination for Indian exports followed by other Asian countries and then North America. As an individual country, however, the largest share of 20.2% is to USA, then Germany with 8.08% share, UK with 6.16% share and Turkey with 5.2% share

India's top 20 component exports in terms of product family during 2013-14

Hydraulic Power Steering Systems & Steering Gear Systems and Parts	Road wheels and parts & accessories	Crank shaft for engines	Head lamps and other lighting equipment
Suspension systems and parts	Drive-axes and parts	Brake linings & pads	Spark Ignition
Gear boxes and parts	Starter motors & generators	Parts for automobiles and earth moving equipment	Radiators & parts
Air-conditioning equipment	Gas compressors: Turbo chargers	Valves, inlet and exhaust	Toothed wheels, other transmission parts
Wheels and Components for Construction & Earthmoving Equipment	Parts-air conditioning machines	Brakes and servo-brakes; parts	Injection pumps for diesel engines

Imports

Imports of auto components declined by 6.3% to USD 12.8 billion in 2013-14 from USD 13.7 billion in 2012-13. Asia and Europe contributed to 57% and 34% of the imports

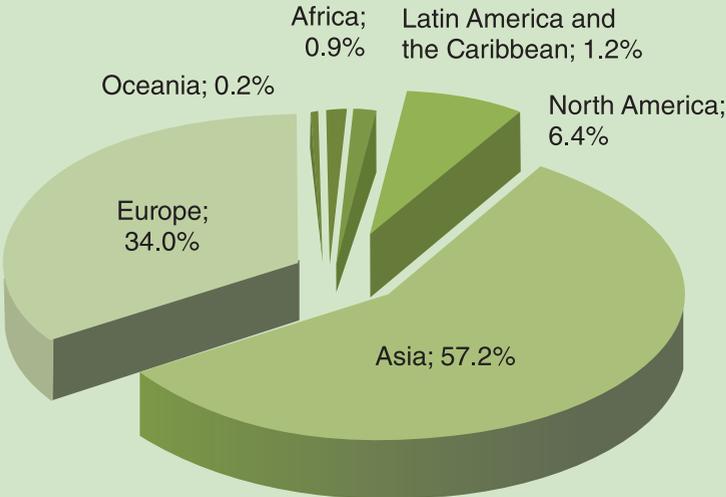
respectively. Asia, China, Japan, South Korea and Thailand contributed maximum imports while from Europe the key contributors were Germany, France, UK, Italy and Spain.

Auto Components Imports (USD Bn) & Growth - CAGR 9%



While imports have reduced marginally in value their share in total domestic consumption continues to increase. There is considerable scope of import substitution to grow domestic components

Share of India's auto component imports



Share of Imports from top 10 countries (%)

China	20.97
Germany	14.97
Japan	12.44
South Korea	11.97
Thailand	7.46
USA	6.29
Italy	3.65
France	2.42
UK	2.26
Spain	2.17

Asian countries account for maximum share of imports led by China, followed by Japan and Korea who have large presence in Indian auto segment; European countries are the next largest lot with Germany leading as an exporter to India

Auto Components Data Source: E&Y Estimate based on ACMA membership data

REGIONS AND COMMITTEES

An Introduction

The activities of ACMA are conducted through regional offices that support the agenda of various national level committees. Each of the committees has a specific set of objectives that guide their activities through the year. Every committee is chaired by member of the executive committee.

The different regional chairman and co-chairman for 2013-14 were as follows:

	Region	Chairman	Co-Chairman
1.	Eastern Region	Mr. Killol Kamani	Mr Sanjay Sabherwal
2.	Northern Region	Mr. Nirmal K Minda	Mr U S Ahuja
3.	Southern Region	Mr. Arvind Balaji	Mr A Venkataramani
4.	Western Region	Mr. Sandeep Balooja	Mr Kirti Rathod

The chairman and co-chairman for the different national committees during 2013-14 were as follows:

	National Committee	Chairman	Co-Chairman
1.	ACT Division	Mr Srivats Ram	-
2.	ACMA Centre for Excellence	Mr Arvind Kapur	-
3.	ASDC	Mr Jayant Davar	-
4.	Aerospace, Defence and Railway	Mr Pranav Kapuria	-
5.	Consumer Affairs & Anti-Counterfeiting	Mr S. Bhattacharya	Mr SriramViji
6.	Finance	Mr Srivats Ram	-
7.	Globalisation & Trade Fairs	Mr Deep Kapuria	-
8.	HR, IR & Skill Development	Mr F R Singhvi	-
9.	IMTMA	Mr K G Mohan Kumar	Mr Krishnakumar Srinivasan
10.	Information Technology	Mr Ravi Machani	Mr Sri Karumbati & Mr S Srinivasan
11.	Knowledge Partner Engagements	Mr A K Taneja	-
12.	Membership	Mr Ramesh Suri	-
13.	Micro Small and Medium Enterprises (MSME)	Mr U S Ahuja	Mr J S Rangar
14.	Original Equipment Manufacturer (OEM)	Mr A K Taneja	-
15.	Past Presidents' Council	Mr Surinder Kanwar (Convenor)	-
16.	Public Policy & Govt. Affairs	Mr Harish Lakshman	-
17.	Raw Materials	Ms Shradha Suri Marwah	Mr Pravin Malhotra
18.	Supply Chain Mgmt.	Mr Rattan Kapur	Mr Sunjay Kapur
19.	Sustainable Development	Mr Deepak Jain	Mr Nishant Arya
20.	Young Business Leaders' Forum (YBLF)	Mr Sanjay Labroo (Mentor)	Mr Rajat Bhandari (N'l Co-ordinator)

Regions

ACMA has four regional offices – Jamshedpur (Eastern Region), Chennai (Southern Region), Pune (Western Region) and Delhi; the regional office of North is located with the Head Office.



In addition, there are zonal offices in Mumbai and Ahmedabad in the West, Bangalore for Karnataka and Hosur in the South, and Pantnagar in the North.

A Regional Office is headed by the Regional Chairperson elected by the respective regional members of the Association. The main objective of setting up the Regional Office is to expand the organisations reach to the entire membership spread across the country, to be able to deliberate and take action on any matter of interest to members and the industry as a whole.

The regional office undertook various activities during 2013-14 with the objective of fulfilling certain specific goals. To begin with, it is through the regional offices that ACMA creates awareness and markets the gamut of services provided by the organisation and its special arm – ACT – among the entire membership. They are the nodal points where ACMA receives, addresses and acts on regional problems and issues related to the industry. The regional offices play a major role in enhancing, strengthening and developing the membership in the regions. They continuously assess, address and communicate issues related to regulatory amendments in terms of technology through ACT and other bodies, drive export enhancement efforts, design and conduct programmes to meet the larger interest of members including issues related to HR, Productivity, Quality, Exports, Technology, Materials, and IT. The regional offices play a catalytic role in organizing interactions with customers

(OEMs and IPOs), potential buyers and visiting delegations. They also explore possibilities of regional delegations going overseas in consultation with the head office.

At the regional level, separate committees are formed and zonal coordinators are appointed from the regional



membership to facilitate efficient and effective dissemination of services in the zones in order to enhance participation from member companies. They periodically make representations to the State Governments and its bodies on issues concerning the membership at large. The regions often work closely with each other and national committee to develop, organize and execute activities jointly.

Committees

ACT DIVISION

'ACMA Centre for Technology' (ACT), established in 1989, focuses on providing technical services to ACMA members in several ways with the available resources of technical professionals with industry background. During 2013-14, ACT continued to provide expert guidance to members to help improve their manufacturing competitiveness, enhance their quality standards and improve productivity and profitability through various interventions. This includes establishing world-class shop-floor practices through cluster programmes. ACMA members are provided technical support through various channels like AOTS Training in Japan, Specialized Trainings and Seminars in India, and JETRO and JIPM Interventions. ACT also provides a platform for the members to avail technology advantages, evolved through various institutions like NASSCOM, TIFAC, DSIR, NATRIP, Fraunhofer and MIT. ACMA members are assisted in standardization of process and harmonization



of standards through AIS, CMVR, BIS and WP.29. Finally, it supports in creating a continuous improved environment and culture within the industry through Quality Circle and Six Sigma initiatives with a focus on institutionalizing these capabilities.

Major initiatives include:

- Upgrading members on the latest developments in technology.
- Member recognition for excellence in various fields of operations.
- Participation and intervention on standards and regulations.
- Training programmes on Lean, Six Sigma and Production Management.
- Interactions with Government / Regulatory / Policy Bodies.
- Promoting increased usage of IT beyond the ERP Systems to enhance competitiveness.
- Fostering partnership with organizations to enhance R&D capabilities.

To upgrade ACMA members on the technology front and keep them abreast of the latest developments in the auto component industry, ACT launched its first newsletter, i.e.,

“ACT now”, in the year 2007. Over a period of time “ACT now” has established itself as an information disseminator on cutting edge quality and productivity concepts. Besides this, the publication has enabled regular sharing of information related to best practices among ACMA member companies.

Since 1st June 2013, the ACT Services are covered under ISO systems.

Aerospace, Defence and Railways (ADR) Committee

Aerospace, Defence and Railways, offers huge opportunities for ACMA members to diversify and de-risk themselves from the business cycles that affect the automotive industry. With the recent opening up of private participation, the Indian component industry can generate significant business replacing foreign sourcing for acquisition of equipment and services, which was the norm in the past.

The Defence Offset Policy, which sets a specific local purchasing norm for OEMs offers significant scope for market expansion for the component manufacturers. NSIC – the nodal agency for implementation of this policy is already working with the OEMs and is looking for eligible suppliers. ACMA members have been actively registering with NSIC to capitalise this opportunity.

With focus on infrastructure development, the Government of India has planned huge expansion for the Indian Railways with an investment plan of Rs.68,000 crore, in total, a part of which will be for the expansion of rolling stock manufacturing. ACMA members are re-orienting their business to meet this new demand. In addition to Indian Railways, the ADR committee has been exploring opportunities with Metro Rails and other coach makers such as BEML, Bombardier and Alstom who already have plants in India.

During 2013-14, the Committee continued with activities that were a logical follow up to the earlier initiatives taken at the time of opening up. The focus was to engage further with the aggregators, OEMs and other stakeholders to establish wider network for ACMA members to capitalise the opportunity and scope offered by the Aerospace, Defence and Railway sector.

Consumer Affairs and Anti Counterfeiting Committee

The ACMA Consumer Affairs Committee continues to address counterfeiting issues in the aftermarket in a concerted manner.

A feature of the activities of this committee is – The Asli Naqli campaign – a drive against counterfeits. Apart from being a highlight in all major shows like Auto Expo and Part Mart, ACMA also organises regular Asli Naqli Road Shows, which are usually conducted in busy retail auto market clusters to educate retailers on visible dissimilarities between real and fake products. Information is also provided for punitive actions against sale of counterfeits.

The Committee continued to voice concerns against illegal sale of counterfeits in the country by organizing national level seminars, interactive sessions with the customs and senior police officers. Through the year, these issues were also brought to the notice of various ministries with a recommendation for some strict punitive measures against counterfeiters.

An IPR Cell listing the names of concerned attorneys has been posted on the ACMA website, which also outlines the role of the attorneys and their charges for advice related to Copyright, Trade Mark Patent and TRIPs registration, Custom related activities on fake imports and Civil action.

The Consumer Affairs Committee continues to take up such focused issues and has worked proactively through the year on:

- After market standards - Guidelines for various “Safety Critical Items”

- Newer standards for vehicles to increase the “Safety level” to bring down accidents, especially fatalities
- Updating the IPR Manual for a more in-depth coverage of IPR related issues that have been periodically ratified with inputs from attorneys

Globalisation, Trade Fairs and Auto Expo Committee

The overall objective of the Committee is to work on initiatives that will help the industry achieve export targets as per ACMA's vision 2020. As a nodal committee focusing on exports, the activities can be broadly classified as follows:

Internationalisation of Member Companies: Members are supported by expanding their international business linkages through partnerships, technology tie-ups or JVs with the assistance of ACMA's global Counterpart Associations. Delegations are organised to understand and explore opportunities that exist in overseas countries and strengthen members' contacts with Global OEMs, Tier1s and Tier2s, and other stake holders in international geographies. Plant visits are organised for incoming international delegations to showcase the capability of the Indian Industry. B2B interactions are facilitated both at national and regional levels that addresses the need of the industry for JVs, technology tie-ups and partnerships. Experts or consultants are engaged at company level for internationalisation and cross cultural practices. International events and symposiums are attended to build the 'made in India brand' and showcase the growing capability of the industry. The Ministry of Commerce, DGFT and relevant agencies and trade bodies are continuously re-engaged to explore upcoming markets by organising delegations, BSMS, and trade fairs

Facilitating Exports: Buyer-Sellers Meets, group participation and specialised events are organised with the support of the Indian Embassy and Consulates in different countries to directly penetrate those markets. Interactions and conferences are regularly undertaken with International Purchase Officers (IPOs) of global companies who operate in India to develop members as suitable vendor.

Information Sharing and Learning: This is done by inviting export awardees to share their experience and address export related issues like product liability, supplier contracts and risk management. Consultants or member companies periodically share insights into global trends in the industry with members. The Committee engages with the IPO forum to bridge the knowledge gap between the suppliers and its overseas customers. Knowledge based training programmes are also developed with the IPOs. Members are updated



through the monthly ID Newsletter that talks of dynamics of the industry, global happenings, business enquiries and recent initiatives.

Trade Fairs: The committee last year took a special initiative in promoting the Industry in both established and emerging market through participation in the Automechanika Brand portfolio of International Trade Fairs worldwide. ACMA has started receiving financial support on regular basis from Ministry of Commerce under MAI (Market Access Initiative) and MDA (Marketing Development Assistance Scheme). All the trade fairs organised this year were subsidised, which has helped in encouraging larger participation in overseas trade fairs as well addressing new markets. In fact, the Ministry of Commerce has recognised ACMA as an export promotional council for MDA and MIA programmes.

HR, IR and Skill Development Committee

This committee deals with a specific management function and bulk of its activities focused on creating awareness among members for making the HR Department, an integral part of the CEO's team in shaping the future of the company and aligning HR's role with the goals of the company. Special efforts were made to strengthen the regional HR forums by involving HR personnel from OEMs and engaging in knowledge dissemination and adoption of best practices. Regional seminars are conducted where thought leaders from all industries share ideas on innovation in HR and better people management. In this process, the auto-component industry gets benchmarked with other industries for best practices.

The Committee also devise programs within the member companies for developing internal leadership, creating a road map for growth of employees, attracting talent, retaining best employees, sustaining their interests and keep them motivated. Joint activities are conducted with the HR fraternity of customers to improve relationships and gauge an understanding of customer requirements. Finally, the Committee undertakes activities that brings matured understanding in relationship between the management, staff and associates, and build in harmony and peace within the industry in terms of industrial relations.

IMTMA Committee

The Machine Tool Industry in India needs to introspect and address concerns of the auto component industry. The industry should gear itself to cope with the challenges posed by the foreign suppliers in terms of quality, reliability, and service deliverables. The foreign machine tool suppliers take turn key projects from the OEM for setting up machine line, offering quality with effective cost and time solution/processes. The entire Engineering industry and OEMs are desirous of zero PPM or 1.67 CpK standards that are offered by the foreign machine tool manufacturers as a standard package. It has become an industry norm to operate at these levels of quality.

The Committee facilitates mutual cooperation between the auto-component industry and the machine tools industry primarily with the objective to upgrade technology for the benefit of ACMA members. The benefits to the ACMA members can accrue from: Machinery with futuristic designs; Value-added services; TPM-friendly machines; Competitively

priced machinery; Short delivery times; Distributed service facilities

IT Committee

The Committee's objective is to promote, facilitate and increase adoption of Information and Communication Technology (ICT) solutions to member firms in order to help ACMA achieve its objectives.

The key focus areas are people, process and technology. In terms of people, the activities centre on human capital, knowledge capital and management priorities, specifically with respect to optimising businesses through ICT. The Committee also actively assists in educating senior management of member firms about the importance of ICT. Broadly, processes cover decision management, budgeting, planning, executing and optimising business processes. The focus is on using IT to enhance key business drivers like quality, cost and delivery, productivity and decision. The Committee assists in establishing processes to evaluate role of ICT investments so that only ICT solutions that generate value are deployed. On technology, the critical aspects are viability, affordability, availability, and alignment with business. With the effective integration of people, process and technology, IT committee helps the optimal use of ICT amongst members to derive long term benefits from seamless integration of value chain, standardization of processes, institutionalization of procedures, automation of repetitive activities, optimization of resources and differentiation to gain competitive edge.

Committee for Knowledge Partner Engagements

With increasing need for a proactive role to be played by the association in public policy and government matters, as also to respond appropriately to dynamics of the business, it is important for the association to nurture and create its own knowledge pool. The Committee guides and advises the association in engagements with consultants/ specialised knowledge service providers to research and develop reports that are beneficial for the industry at large. During 2013-14, E&Y was ACMA's Knowledge Partner and regularly provided various reports on Exim, Financial analysis, Tax and Trade alerts. In addition, ACMA with the guidance of this committee engages leading global consultants from time to time on studies on topical interest to the industry.

Membership Development Committee

The Committee's primary role is to enhance the organisation's membership base, revitalize dormant and inactive members, ensure periodic interaction with members for better service provisions, and arrange programs to create awareness of ACMA's services.

To fulfil this objective, the range of activities of the committee in 2013-14 included meeting with new members after every EC meeting. This first interaction with new members is done to make them aware of the benefits provided by ACMA. The committee also makes presentations on ACMA activities and services on the side lines of most major ACMA events.

MSME Committee

Micro, Small and Medium Enterprises (MSME) contributes nearly 8% of the country's GDP, 45% of manufacturing output and 40% of exports. They provide the largest share of employment after agriculture and are a nursery for entrepreneurship and innovation. MSMEs are widely dispersed across the country and produce a diverse range of products and services to meet the needs of the local markets, the global market and national and international value chains. To help automotive MSMEs sustain in the changing scenario and to meet the overall automotive industry targets, as envisaged in the AMP 2016/Vision 2020, the ACMA MSME Committee takes the following initiatives:

- Regular interactions with Members, Micro, Small and Medium Enterprise members
- Understand and represent issues of MSME and redress them with relevant bodies
- Evolve specific programs for the benefit of MSMEs and facilitate their development
- Drawing up actionable points for execution at national and regional levels

Schemes of Assistance for MSMEs: While a number of direct assistance schemes and immediate contingency measures are available for MSMEs, there are other available channels also to supplement credit flow for the MSMEs.

Access to capital combined with the cost of Capital is the single most significant challenge for the industry, especially for the MSMEs. To address this, last year ACMA entered into an MoU with SIDBI to make available credit to the smaller enterprises at lower than market rates. ACMA has created a special cell at Delhi to promote the SIDBI scheme to its members.

Government Interactions: Interactions with relevant ministries in the government were taken up particularly focusing on Members' issues on finance, and others (disbursement of loans, MDA, technology modernization funds, etc.)

Technology Requirement: Availability of right technology at the right time is an essential factor for serving fast changing market needs.

Design Clinic Scheme for Design Expertise to MSMEs, a unique and ambitious design intervention scheme for the country's micro, small and medium scale enterprises, is an initiative of Ministry of MSME providing funding support to the MSME sector for the initiative and the National Institute of Design implements the scheme. MSME Committee of ACMA has engaged with NID in getting this benefit reach its ACMA MSME members. Few awareness creation Seminars were conducted at different venues followed by the Need Assessment Survey and Design Clinic Workshops to support the industry in their designing projects.

OEM Committee

Through this committee, ACMA has instituted a formal mechanism to work with SIAM and the OEMs. The Committee continues to further strengthen the relationship between OEMs and the domestic auto component manufacturing companies. It works with SIAM and the OEMs towards identifying strategic issues, addressing problems of common concern, sharing best practices that serve as a bridge or forum for healthy dialogue between ACMA and SIAM.

Some of the issues the Committee addresses through its various initiatives are:

- It collates views from the ACMA memberships through the ACMA Executive Committee.
- The Committee addresses the challenges that domestic suppliers, especially small and medium component manufacturers, face such as access to cost-effective capital, fluctuations in raw material prices, capacity creation, limited skilled resources, lack of technology upgradation, material substitution, and limited aftermarket operations.
- It assesses the increasing competition from overseas suppliers, especially from Low Cost Countries (LCCs). Also keeps track of the steady increase in imports.
- Through OEMs and Tier 1 suppliers the committee helps upgrade the Tier 2 and Tier 3 suppliers to world-class levels.
- The Committee provides periodic updates to its members on the progress of the discussions and reviews the emerging trends and requirements to service the auto component industry.

Committee for Public Policy and Government Affairs

Urgent and proactive action by the industry, coupled with timely intervention by government, is critical to ensure success, competitiveness and sustainability of the auto component industry in India. ACMA continues to work in a proactive manner with the Government of India. It ensures that it is represented on appropriate panels, committees, councils, working groups or similar so that, it is in a position to forward the industry's views and opinions to different ministries and government agencies. The focus is mainly related to matters pertaining to Trade Policy and Promotion, WTO, Monetary and Fiscal Policy, Technology, and all such issues that impact the auto component sector. It also brings to the fore the opportunities that exist for members under different policy frameworks.

With the increasing and proactive role to be played by the association in Economic Affairs and Public Policy related matters, the association continues to strengthen its engagement with the following government Ministries and Departments like the Development Council for Automobile and Allied Industries (DCAAI) - Department of Heavy Industry, Development Council for the Machine Tool Industry - Department of Heavy Industry, National Automotive Board - Department of Heavy Industry, Inter-Ministerial Groups (IMG), - Department of Heavy Industry, IMG on Taxation, Fiscal Policy and Trade, IMG on Emissions, Fuel Policy and Auto Testing, IMG on Infrastructure, HRD, Auto Designing and AMP Related issues, Indo German Joint Working Group - Department of Heavy Industry and, India-Netherlands Joint Working Group on Automobile Sector - Department of Heavy Industry.

In addition, it deals interacts with the RBI on Policy Issues, the banks and ECGC on financial packages and schemes for the industry, Ministry of Finance for matters related to fiscal policy, direct and indirect taxes, Safeguard issues and Anti-dumping. There are also combined interactions with DGFT, and Ministry of Commerce and Industry specifically on foreign trade policy and export benefit related matters, WTO and trade negotiations.

The Committee has been regularly working with the Department of Road Transport, ARAI and BIS on regulatory matters.



Key Focus Areas:

- Regular dialogue with the Ministry of Commerce (MOC) to ensure that the interest of the Auto Components Manufacturing industry in India is appropriately considered as various FTAs and other trade agreements are being signed by the Government
- Regular interface with the Ministry of Finance (MoF), the Ministry of Heavy Industries & Public Enterprises (MoHI & PE) and DGFT to ensure that benefits for exports that mitigate cost of infrastructure and other shortcomings in India are addressed
- Preparing the ACMA membership, especially the small and medium enterprises, for GST implementation
- Putting in place a fresh strategy for R&D / Technology Development for the auto component industry
- Collation and dissemination of authentic and credible industry and trade statistics
- Create a portal for ACMA Members where they can access various information pertaining to Public Policy and other subject related matters
- Compilation of Government schemes

Raw Materials Committee

The Raw Material Committee has been spearheading material related issues of members at various fora. The Committee in this regard, has been addressing the concerns of members by interfacing with the supplier industry to understand material shortages, discuss the price and quality related issues, collate information from members' on their

material requirements and disseminate the same to the supplier industry.

Raw Material Committee also liaises with senior government officers specifically on price escalations that require urgent government intervention. The Commodity Price bulletin helps enable members' benchmark their commodity prices with International prices.

To understand new product developments and to understand the demand supply scenario, the Committee has been organizing regular interactions with the senior management of material suppliers

The initiatives taken during 2013-14 include:

- A monthly bulletin on metal and commodity prices
- Committee also continued collecting information on various raw materials which is used by members as per their utilization pattern
- Organized seminars on new technologies/ product development materials in the auto component industry to understand new age products that are fuel efficient, environment friendly and cost effective.
- Meetings were organised with supplier associations (ASPA, Aluminium Association of India, Indian Lead Zinc Manufacturers Association, and Rubber, Plastics association) to address the issues on quality, availability and price volatilities.
- The Committee worked on sharing information on scrap generated by one company that could be used as an input material for the other within the ACMA membership.
- Cluster development on material purchase for members with common requirements was also explored.



Supply Chain Management Committee

The committee address the basic hygiene factors of quality, cost and delivery, especially among the tier 2/3/4s to strengthen the capacity and capability within the supply chain. The committee's objectives are to introduce seamless integration of auto component suppliers in different tiers in terms of Quality, Cost and Delivery, build capability in terms of forecasting, organise programs aimed at improving capability of Tier 2/3 supplier, identify suppliers in various tiers in different regions to support multiple zonal operations and organise buyer-seller meets – Tier 1 & 2/3 to display products for sourcing/developing.

Sustainable Technology Development Committee

The committee proactively engages with the government institutions and OEMs to bring forth new opportunities and solutions for the auto component manufacturers from NEMMP 2020 (National Electric Mobility Plan). It also conducts awareness programmes on re-cycle technologies, hazardous wastes and carbon footprints. To keep the industry updated on new technologies including e-mobility, it conducts plant and institution visits within India.

YBLF – Young Business Leaders Forum

The genesis of YBLF was to facilitate succession and equip young leaders in the auto component industry with skills for greater challenges as their businesses attain scale. YBLF provides its members an opportunity to share across the table critical information on latest developments in the Indian and overseas automotive industries which could have an impact on their individual businesses. It believes in engaging with its members in activities that 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 direction of business.

ACMA in Press



Business Standard

ACMA welcomes Tamil Nadu's move to set up an 'auto city'

Press Trust of India | New Delhi
February 25, 2014

COVER STORY
The Tech Centre revolution!



Suppliers showcased their very latest products and technologies at the ACMA Suppliers' Meet at Pragati, New Delhi, on Feb 15-16, 2014. The event was organized by ACMA in association with the Government of India, Ministry of Heavy Industries & Public Enterprises.



ACMA deliberates usage of polymer composites

THE ECONOMIC TIMES

40% of Indian component manufacturing capacity lying idle: Harish Lakshman, ACMA

Motown INDIA
ACMA-YBLF delegation to Mexico



Focused buyers benefit from parts fair at Pragati



MARQUEE EVENTS



53rd Annual Session and National Conference, September 2013 – New Delhi

The theme of the Annual Session was 'Achieving High Performance in Turbulent Times – Creating Advantage from Adversity'.

The conference was inaugurated by the Union Minister of heavy Industries and Public Enterprises, Government of India – Mr Praful Patel, also attended by distinguished guests including the President Designate, CII – Mr Ajay Shiram and President, SIAM – Mr Vikram Kirloskar.

Conference focused on evolving strategies and execution plans to sustain leadership and counter a challenging business environment characterized by increased Volatility, Uncertainty, Complexity and Ambiguity (VUCA). To draw further insights into this theme, ACMA commissioned a study conducted by Accenture on 'Achieving High Performance in Turbulent Times – Creating Advantage from Adversity'. The findings of this study was presented at the session, which provided a detailed analysis on the real impacts of the VUCA environment on the day to day operations of Indian auto-component companies across tiers and its impact on operating margins and growth. Accenture's globally recognised High Performance Business Framework has





been applied to understand how the high performers in the auto-component industry behave differently from their peers in the VUCA environment. The conference also had panel

discussions on the theme, where there was participation from eminent leaders of the Indian auto and component industry.

ACMA Annual Award Winners – 2012-13

	EXCELLENCE IN EXPORT
	SMALL CATEGORY
Certificate of Recognition	Stork Rubber Products Pvt. Ltd., Gurgaon
	LARGE CATEGORY
	Comstar Automotive Technologies Pvt. Ltd. Chennai
	Raunaq Automotive Components Ltd., Uttar-Pradesh
	Helvoet Rubber & Plastic Technologies (I) Pvt. Ltd., Pune
	EXCELLENCE IN TECHNOLOGY
	SMALL CATEGORY
Gold Trophy	Sellowrap Industries Pvt. Ltd., Gurgaon
Silver Trophy	Stork Rubber Products Pvt. Ltd., Gurgaon
	LARGE CATEGORY
Gold Trophy	Rockman Industries Ltd., Haridwar
Silver Trophy	Neolite ZKW Lightings Pvt. Ltd., Bahadurgarh
Bronze Trophy	Sona Koyo Steering Systems Ltd., Dharuhera
	EXCELLENCE IN QUALITY & PRODUCTIVITY
	SMALL CATEGORY
Gold Trophy	New Swan Autocomp (P) Ltd., Ludhiana
Silver Trophy	Rucha Technologies Pvt. Ltd., Aurangabad
Bronze Trophy	Stork Rubber Products Pvt. Ltd., Gurgaon
	LARGE CATEGORY
Gold Trophy	Emitec Emission Control Technologies India Pvt. Ltd., Pune
Silver Trophy	Neolite ZKW Lightings Pvt. Ltd., Bahadurgarh
Bronze Trophy	Ecocat (India) Pvt. Ltd., Faridabad
	EXCELLENCE IN MANUFACTURING
Gold Trophy	Subros Ltd., Noida
Silver Trophy	Rane Brake Lining Ltd., Trichy
Bronze Trophy	Lumax Industries Ltd., Dharuhera
Bronze Trophy	Comstar Automotive Technologies Pvt. Ltd., Chennai
Bronze Trophy	Rockman Industries Ltd., Haridwar

GOLD TROPHY WINNERS



Manufacturing: Subros Ltd., Noida



Quality & Productivity (Large): Emitec Emission Control Technologies India Pvt. Ltd., Pune



Quality & Productivity (Small): New Swan Autocomp (P) Ltd., Ludhiana



Technology (Large): Rockman Industries Ltd., Haridwar



Technology (Small): Sellowrap Industries Pvt. Ltd., Gurgaon



Export –Certificate of Recognition (Large): Comstar Automotive Technologies Pvt. Ltd., Chennai







12th Auto Expo (Components Show), February 2014 – New Delhi

This was jointly organised by ACMA, CII and SIAM. The four day event ended on a high note with engagement of all stakeholders who participated for serious networking and business meetings. The event was inaugurated by the Minister of Heavy Industries and Public Enterprises – Mr Praful Patel.

The Components Show, a B2B expo with an overall participation of 1,100 companies, showcased around 500 new technologies and over 5,000 products. The event was spread across 6 halls and 17 hangars. Apart from domestic exhibitors, there was a large participation from overseas companies including those from USA, Japan, South Korea, China, UK, Taiwan, Canada and Germany who displayed many breakthrough technologies and products for the Indian market.

With over 70,00 visitors and an estimated 34,000 business enquiries generated, the set new records. Many international delegations from Germany, Korea, China, Russia, Sri Lanka and Canada visited to explore new opportunities, collaboration and JVs with the Indian manufacturers.

During the expo, the organisers undertook specific initiatives to focus on various pertinent industry issues and develop business opportunities for the participants. These included hosting delegations, seminars, conferences and various awareness-enhancing initiatives -some of the events held during the four days duration are:

Safety Pavilion - For the first time at the Components Show, a safety pavilion was setup, which showcased 'safety critical items'. The necessity for a thematic exhibition on 'safety' comes in the wake of increased road accidents and the need to sensitise the consumers on the importance of both active and passive road safety.



AutoDX - During the run-up to the Auto Expo, ACMA and SIAM, jointly announced the creation of Auto Data Exchange 'AutoDX' on February 04, 2014, an EDI platform for seamlessly integrating OEMs and suppliers on a common data exchange standard. This path-breaking initiative will help standardise transaction data definitions, automate data exchange amongst industry players, obviate manual data entries and provide data interchange capability across the automotive industry to enable a streamlined supply chain. An estimated 40 OEMs (SIAM members) and over 700 suppliers (ACMA members) are expected to derive business benefits through standardisation of information exchange and use of common EDI technology infrastructure. The initiative will increase supply chain efficiency, reduce transaction costs and in the long run, provide end-to-end tracking and traceability of goods across the supply chain.



Conference - A conference was organised on the theme of 'Graduating to a Design and Engineering capable supplier' with the objective of understanding the dynamics of engineering and designing capabilities and its integration with the business needs of the vehicle manufacturer.



Canada Session - ACMA, along with Automotive Parts Manufacturers Association (APMA) of Canada organised a session on 'Business Opportunity with Canadian Automotive Industry' with the objective of exploring business opportunities, between the automotive industries of the two countries. The six-member Canadian delegation evinced keen interest in partnering with their Indian counterpart.



National Conference - With a view to provide a deeper understanding on global standards, processes and strategies related to exports, a national conference on 'Meeting Challenges of Exports: Product Liability, Warranty & Recall' was organised. The seminar aimed at creating awareness in the auto components exporting community on legal liabilities and claims due to failure or non-performance of products exported.



Seminar - A seminar on 'Packaging, security labels and brand protection solutions for the aftermarket' was organised. Through this event, ACMA brought together component suppliers to discuss businesses, which are adversely impacted by counterfeiting, and the agencies, which have been actively developing solutions to address these challenges. The various points touched upon through the conference were 'Printable Security Features in Paper Board Packaging', 'Anti-Counterfeiting Technologies', 'Value engineering', and 'Emerging trends in carton packaging'.



Workshop - In order to motivate the Indian auto component industry to focus on innovation, ACMA and Fraunhofer Institute of Germany jointly organised a workshop on February 08, 2014 on creating a conducive ecosystem for a culture of R&D and product development. The workshop focussed on technical subjects such as structural durability, bulk metal foaming and laser material processing.

Students Engagement - in order to increase the engagement of the engineering-student community with the automotive industry, a contest titled 'passion for innovation' was also organised during the exported contestants were asked to identify new technologies on display among various exhibitors along with detailed presentations on the technologies identified, their usage and how these technologies could help industry improve overall quality. In all 23 institutes participated from across the country. Of these, three were awarded namely: HMR Institute of Technology, Hamidpur, Delhi with the first prize; Gautham Buddha University, Noida, the second while JMIT, Kurukshetra, won the third prize.

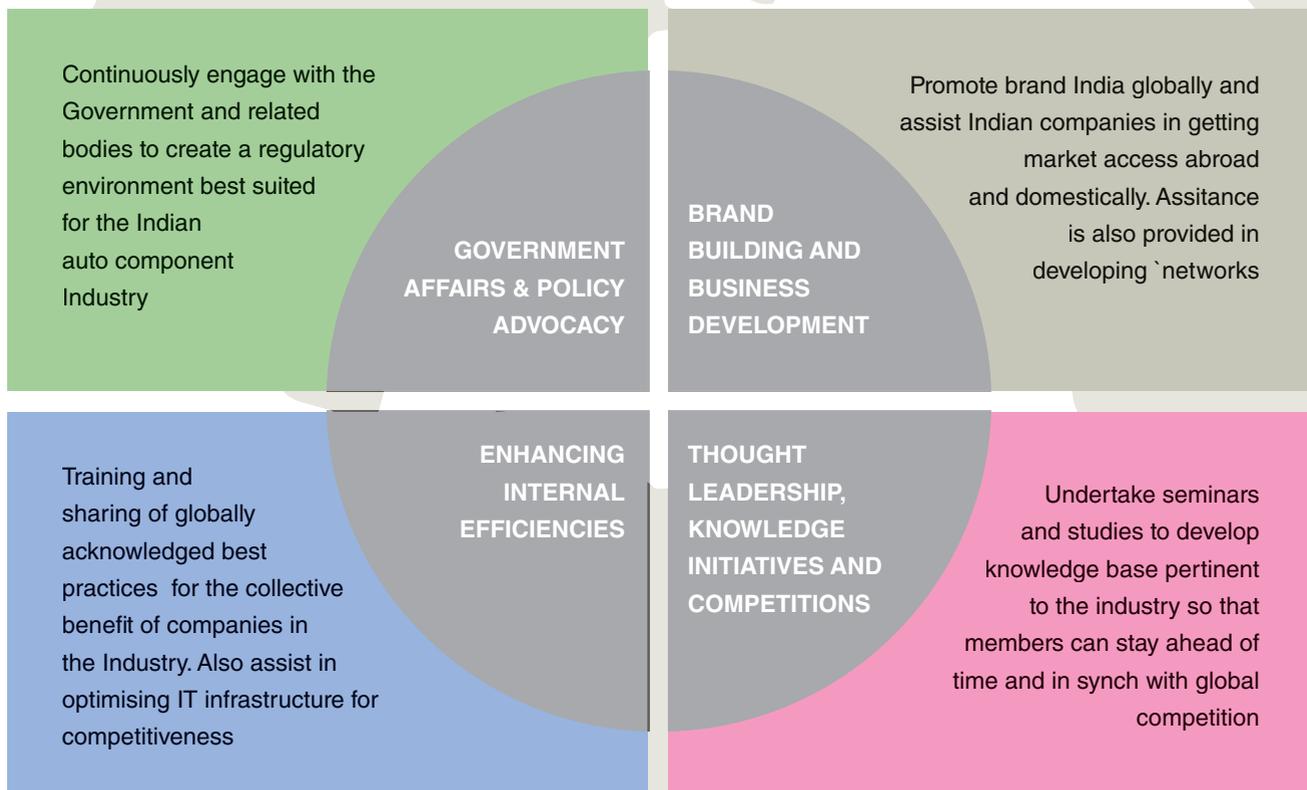
ANNUAL ACTIVITY HIGHLIGHTS

ACMA's agenda is primarily to assist the auto-component industry in India to prosper and grow. As an association it provides a forum for collective action from individual member companies and all its activities are guided by the goal of optimising the mutual co-operation of members for the overall benefit of the industry. Today, the specific medium to long term vision of the organisation is to support

can be broadly classified under four heads, which are described below.

Government Affairs and Policy Advocacy

ACMA Pre-Budget Memorandum for Union Budget 2014-15



This chapter reports some of the important activities carried out under each domain during 2013-14

the Indian auto-component industry to capture a greater share of the global market. This translates into activities that promote Indian companies across the globe, help develop networks for Indian companies to integrate into global supply chains, provide knowledge and data on international developments for Indian companies to leverage, develop a congenial business environment to become a global industry and assist companies in developing internal efficiencies to be globally competitive. In addition to this there is several support mechanisms provided for development of the local market. Essentially, the activities of ACMA

ACMA submitted its Pre-Budget Memorandum to the Government in December 2013 for the interim budget and also incorporated additional recommendations for submission to the Ministry of Finance for the Budget prepared in July 2014 by the present Government.

The new Government has been receptive to the needs of the automotive industry. With the announcement of continuation of reduced excise duty on auto components until December 31, 2014 and focus given on development of MSMEs, infrastructure, education, skilling, and attracting investment, the outcome of the Union Budget has been favourable to the auto components sector.

Foreign Trade Policy 2014-19:

With inputs from members, ACMA recommendations for Foreign Trade Policy 2014-19 have been submitted to the government. ACMA's thrust has been the creation of a long-term stable policy for exports.

Regulatory Matters

ACMA is represented in all concerned committees, panels, councils and working groups where it will represent the interests of component manufacturers in regulatory matters. It also has continued interaction with government and related bodies that deal with controlling the menace of counterfeit.

Brand Building and Business Development

AUTOMECHANIKA MOSCOW, August 2013 – Russia

The inaugural edition of Automechanika, Moscow was jointly organised by ACMA and Messe Frankfurt. This is considered to be the largest exhibition related to after-sales services in Russia that provided a platform to the participating ACMA members to interact with international vehicle dealers.

The event brought together 1,612 exhibitors from 47 countries, taking up 5 expo-centre pavilions and outdoor space that exceeded 51,000 sqm. India was one of the 16 countries with a national pavilion supported by the Government and Industry Association.



There was also a business programme designed for trade professionals alongside the main exhibition. Based on a survey of the leading Russian auto repair companies, the key points of discussion included issues related to market research and the problems in reliable data, development prospects of the market for repairing or replacing vehicles, maximising profits in auto repair and activity of business communities in the auto repair industry.



CEOs' Mission to Brazil, August 2013

The CEOs' Mission to Brazil was undertaken to study the latest trends in the Latin American automotive market and to assess the opportunity for Indian auto component manufacturers in Brazil. The mission comprised of 15 ACMA members.

The mission focused on establishing relationships with relevant Government agencies and other facilitating organisations in Brazil to understand investment options, policies and incentives, meeting global OEMs and reinforce ties with ACMA's MoU partner – SINDIPECAS, Brazilian Association of Auto Component Manufacturers.



It was observed that due to high import tariff and stringent requirements of localisation, major automotive players have expanded their operations in Brazil through the joint venture route with local partners to produce vehicles and auto-components. In addition, high import tariffs have continued to protect the domestic industry.

There were focused interaction with OEMs like John Deere, Renault Nissan, Mercedes Benz, IVECO, Cummins, MWM International – Navistar, and Ford.

ACMA-Japan External Trade Organisation (JETRO), November 2013 – Chennai

A two day 'Automotive Parts Procurement Exhibition' was organised at a time when both Japan and India are keen



on increasing bi-lateral trade. 46 companies from Japan participated apart from several eminent Indian companies. The objective of the exhibition was to showcase the increasing capabilities of the Indian auto component industry and to strengthen its ties with the Japanese automotive supply chain. ACMA, as always, highlighted the potential of Tier2/Tier3 suppliers in the MSME segment to explore opportunities for the component makers.

Participation at AAPEX 2013, November 2013 – Las Vegas, USA

The Automotive Aftermarket Products Expo (AAPEX), is the largest annual trade show for automotive aftermarket professionals co-sponsored by the Aftermarket Industry Association (AAIA) with an annual showcase of USD 477



billion. It provided a great platform for propagating the Indian auto component industry in the US market and ACMA participated at the invitation of AAIA.

ACMA took a joint island stand of 1,000 sqft and 10 companies jointly displayed their product range. The participating members met key department officials from product design, R&D, quality assurance and purchase teams of international Tier 1 component suppliers.

CEOs' Delegation to Indonesia and Vietnam, November 2013

ACMA organised a four day visit to Indonesia and Vietnam with a delegation of member CEOs to understand the local automotive industry and explore new investment opportunities. The delegation was led by Mr Harish Lakshman, President, ACMA that comprised 11 members. Through the visit, the delegation gained insights into the automotive industry of the region, explored new opportunities in terms of JV, collaboration and strategic alliances, built trade links, met global OEMs, liasoned with relevant government agencies and identified the challenges in both the countries.

Taking this opportunity, in Indonesia, the delegation met senior managers and visited the facilities of Toyota, Honda Astra (2 wheelers) and Honda Prospect Motor (Cars) to gauge an idea of their future requirements. They also met the Indonesian Investment Coordinating Board and H.E. Mr. Gurjit Singh, Indian Ambassador to get a prospective of the investment opportunities.

In Vietnam, the delegation met senior officials and visited the facilities of Yamaha, Piaggio and Pt Minda (Vietnam) – an associate of a member company. They also interacted with the Ministry of Heavy industries along with Senior Management of Toyota Vietnam. The Embassy of India organised a B2B seminar attended by the ambassador of India in Vietnam, H.E. Mrs Preeti Saran. The Indian embassy also facilitated an interaction for the ACMA delegation with VAMA (Vietnam Automobile Manufacturers' Association), Hanoi Supporting Industry Business Association and Vietnam Motors Industry for future cooperation.



2nd ACMA Buyers Sellers Meet and Exhibition, December 2013 – Rudrapur

ACMA, Northern Region, along with its Supply Chain Committee organised a business meet and an exhibition where over 40 companies participated including 17 Tier 1 companies. All the companies showcased their products, new technologies and capabilities. The objective of the meet was to bring together the T1, T2 and T3 suppliers with the OEM sourcing teams.

ACMA CEOs’ Delegation to China, March 2014

ACMA organised a ten-member CEOs’ delegation to China, which was supported by the Embassy of India, CCPIT and CII-Shanghai. The delegation comprised of CEOs of leading Auto Component Manufacturers of India. The visit was led by Mr Harish Lakshman, President ACMA, with an aim to explore opportunities and interact with Chinese OEMs/ Tier 1s.

During the four day visit, the delegation took this opportunity to meet global and Chinese OEMs, component manufacturers, government officials and local industry bodies to update them on the growing capabilities of the Indian Auto component Industry as well as provide impetus to business engagements between the two countries. ACMA delegates met McKinsey, Shanghai GM and its International IPO, Sr. Management of Ford, purchasing heads of Volkswagen, Faurecia, TRW, VW, Corning, IHS, Lifan and Sokon Group.

The delegation observed that there is a lack of awareness of Indian supplier’s competence and capabilities - though some companies did show interest in sourcing some critical components which are currently being imported from Europe or Japan, the International OEMs follow ‘one product-one-supplier’ policy. The Chinese vehicle industry is expected to

grow at 7-8% in the next few years which may provide some respite to the Indian suppliers from present slow down.

Interaction with German Delegation, March 2014 – Chennai

Growth in the US and European markets is critical as they contribute to 30% of India’s overall shipments in overseas. Keeping this in light, ACMA felt the need to improve logistic services among Indian suppliers which in turn will help them in spreading their client base. Therefore, ACMA invited Logistics Alliance Germany (LAG)’s to strengthen logistical services to European markets. A delegation from LAG, Germany visited ACMA. The Logistics Alliance Germany is a leading logistical services providing expertise in sector specific logistics, network logistics, transport logistics, contract logistics, procurement logistics, distributions logistics and across all transport modes. It is a public private partnership of the Federal Ministry of Transport and Digital Infrastructure and the German logistics industry.



The delegation was headed by Ms Brigitta Worringer, Head of Directorate, Federal Ministry of Transport and Digital infrastructure. The objective of the visit was to provide inputs on the challenges faced by Indian companies in exporting to Germany and other EU companies.



INAPA 2014 – 6th Indonesian International Auto Parts, Accessories and Equipment exhibition, March 2014 – Jakarta

In continuing its effort to assist members in establishing and bringing new linkages, ACMA, organised a group participation at the INAPA 2014 in Jakarta International Expo (JIExpo), Indonesia. INAPA 2014 is one of the most influential auto parts show in the ASEAN region, which was held together with Tyre and Rubber-2014, IIBT -2014 and INABIKE 2014. Over 1000 companies from 11 international groups across the different sectors participated in the show. The show was visited by 21,120 business professionals from over 35 countries. This was the second time that ACMA organised a group participation at the INAPA show, the first being in 2012. The show saw a huge participation from overseas exhibitors including Australia, Malaysia, Taiwan, China, Korea, India, Indonesia, Japan, Singapore and Turkey. The Indian exhibitors had a total of 80 square meter space where 10 companies displayed their products.



YBLF's Delegation to Mexico, March 2014

YBLF's delegation comprised of 13 YBLF members and was led by Mr. Sanjay Labroo, Mentor of YBLF and Past President ACMA. The delegation had the opportunity to interact with the Indian Ambassador in Mexico and Executive President of INA and got insights into Mexico and the Mexican Automotive Industry. They met major OEMs including Ford Motor Company, Chrysler and Volkswagen.



Enhancing Internal Efficiencies

Training Programme on 'Predictive and Preventive Maintenance and NDT Techniques', August 2013 – Pune

The workshop was specially designed for plant managers, engineers and supervisors from projects, operations and maintenance departments. The main objectives of predictive maintenance is to have increased availability of production systems with increased safety and optimised costs. The programme further elaborated on vibration monitoring, thermography and tribology.



Launch of 8th Batch – Six Sigma Black Belt Certification Programme level – 1, August 2013 – Pune

The Six Sigma Certification Programmes continued to receive excellent response from ACMA members across regions and the Western Region launched the 8th batch after successfully completing seven batches.

Workshop on Conflicts Management and Inter-Personal skills, August 2013 – Jamshedpur

The programme highlighted the different conflict handling styles which are prevalent in every individual and trained the individuals in deploying them based on the different situations arising in an individual's work life.



Training Programme on Flow Manufacturing, August 2013 – New Delhi

ACMA, Northern Region, organised one training programme on Flow Manufacturing where participants were trained

on fundamental concept of Flow, which is the core of lean management designed to help improve or smoothen the flow of parts and material through the production process. The goal is to optimally balance production lines with little waste, at lowest possible cost, on time and defect free. The concept of TAKT timeline or the time allowed by customer to produce and supply product was also elucidated.



Training Programme on Problem Solving 8-D, August 2013 – New Delhi

ACMA, Northern Region, organised one day training program that explained the eight Discipline Problem Solving method used to resolve problems related to process and product, which is typically deployed by quality engineers

Training Programme on ‘Problem Solving Techniques through creativity and innovation’, August 2013 – Ahmedabad

The training was aimed at refreshing participants with techniques for a systematic approach to problem solving. The target audience were production staff, field staff, quality staff, supervisors, engineers and managers.

Workshop on ‘Managing Business Functions Effectively through Monitoring Key Financial Parameters’, August 2013 – Nashik

The objective was to provide an opportunity for the membership to train their personnel on how each independent function in a company can contribute to optimise financial parameters like working capital, operating costs and impact of currency fluctuations.

The training was conducted through lectures, participative and experiential learning methods like games, audio-visuals and case studies.

YBLF’s workshop with SuperCFO, August 2013 – New Delhi

SuperCFO, a leading provider of CFO services in the virtual, interim, special purpose and full time space, partnered ACMA



in organising a one-day workshop on ‘Navigating business through finance’. The workshop included detailed sessions on company structure, corporate governance, business plan, transfer pricing, raising capital, managing business finance and role of a CFO for better financial management.

One Day Training Programme on the Costs of Poor Quality (COPQ) and its Controls, September 2013 – Bangalore



With a focus on controlling costs of poor quality, ACMA – K&H organised one-day training programme on Costs of Poor Quality and Control Methodology. The programme established the concept that higher levels of quality do not mean higher costs. Instead, costs are reduced by doing something right the first time rather than to fix something that is not acceptable. The programme focused on the types of poor quality costs, method to identify them and techniques of eliminating them. The programme was well attended by 14 delegates

Workshop on Managing Workforce, September 2013 – Chennai

ACMA, Southern Region, initiated a workshop on ‘Managing Workforce’ exclusively for supervisors. The workshop had interactive sessions in personal effectiveness, SWOT analysis, Kaizen and continuous improvement. It covered issues like engaging workers, developing a positive attitude and effective management style. There were also sessions that covered managing cultural change, effective change

management, work-life balance, inter personal dynamism and conflicts management.

Training Programme on Advance 7 QC tools, September 2013 – New Delhi

ACMA, Northern Region, organised one day Training Program on advance 7 QC tools, with is an approach to analyse process based on, thinking and identifying potential causes of problems and effectively resolving them, was explained to all participants.



Workshop on Safety and Ergonomics Practices, September 2013 – New Delhi

ACMA, Northern Region, organised the programme where the participants were introduced to the concepts of safety and its implications and how to avoid accidents in the workplace.

Training on Waste Elimination, September 2013 – Rudrapur

ACMA, Northern Region, organised this one-day Training Programme with active participation from members. Concepts including waste elimination and its deep impacts on the quality and productivity of companies were explained and discussed with live examples.



Workshop on 'HR for Non HR Executives', September 2013 – Pune

The workshop was focussed at more holistic approach towards HR. The aim was to provide insights into the

transformation of HR from being a simple prerogative of the HR department to one where each department has a proactive role in managing and nurturing their human resource with the HR department playing a catalyst's role.



ACMA-SIAM B2B Information Exchange, Workshops, October 2013 – Bangalore, Pune, New Delhi, Chennai

SIAM and ACMA IT committees jointly developed a data exchange format using EDI or Electronic Data Interchange. The auto industry has become a pioneer amongst manufacturing companies to adopt the EDIFACT standards through this initiative. This will help standardise transaction data definitions, automate data exchange, obviate manual data entries and provide data interchange capability across the automotive industry to streamline the entire supply chain. This is a result of a joint effort over 2 years between the 2 associations – SIAM and ACMA – and the service provider for the pilot stage was IBM.

The system has been put to test through July-December 2013 and the critical documents are being studied and analysed to prepare an appropriate interface. The working committee along with IBM conducted day long workshops across the country to share the output of the working committee with industry members. The participants appreciated the efforts of SIAM and ACMA and hoped that it will increase supply chain efficiency, reduce transaction costs and provide end-to-end tracking and traceability of goods across the supply chain.

Training on Productivity Enhancement through Low Cost Automation, October 2013 – Rudrapur

The one day training program provided lessons on the approach of Low Cost Automation and Kaizen and its impact on quality, cost and productivity. Participants were introduced to the concept of low cost automation as a method of converting manual work to auto work by adopting simple techniques. Specific insights were provided through case studies that also established the linkages between low cost automation and Kaizen.



Training Programme on Cost Reduction through Implementation of ITR and VAPCO, October 2013 – New Delhi

ACMA, Northern Region, organised one day training programme, focussed on managing inventory and conversion costs to optimise returns and maximise savings.

Training Programme on New Product Development and Product Design, October 2013 – New Delhi

ACMA, Northern Region, organised one day training programme that highlighted the need for continuously developing new products and processes as a key tool for survival in a very competitive business environment.



Workshop on Process Capability, October 2013 – Bangalore

ACMA, Southern Region, organised one day event that was aimed at training to sustain quality by keeping a tab on variation and tolerances. The workshop touched on the basics from identification of critical areas for customers to understanding of statistical tools and control methods.

Workshops on Negotiating Skills, October 2013 – Bangalore, Coimbatore and Chennai

Three workshops were conducted in Bangalore, Coimbatore and Chennai. The sessions stressed on the various types of negotiation skills that is essential qualities to become a leader. These relate to day to day personal and professional life.

Workshop on Process Capability, October 2013 – Chennai

The workshop stressed on meeting customer requirements and expectations through effective internal processes. The objective of the programme was to make the participants understand the methodology and equip them with tools to deal with problems.



Training Programme on ‘Managerial Effectiveness and Result Orientation’, October 2013 – Nashik

Efficient managers are critical to business and to promote effective management, ACMA conducted this one day training programme

Workshop on ‘Failure Mode Effect Analysis’, October 2013 – Pune



The session covered topics related to FMEA, which can provide an analytical approach to dealing with potential failure modes and their associated causes. When considering possible failures in a design – like safety, cost, performance, quality and reliability – an engineer can get a lot of information on how to alter the development and manufacturing process. FMEA is an easy tool to determine which risks have the greatest impact and accordingly take corrective action,

Workshop on ‘HR for Non HR Executives’, October 2013 – Ahmedabad

This was an extension of the programme held in Pune to focus on HR management requirements across functions.

The workshop covered various issues on HRM. It also outlined the responsibilities of the departmental head to find a solution.

Training Programme on Leadership, November 2013 – Rohtak

ACMA, Northern Region, organised one day training programme, with an objective to inform participants on different leadership styles to yield high performance from corporate environment. The program focused on the understanding team dynamics by deploying various leadership styles and analysing the team performance under such leaders. Participants were further exposed to concepts of types of leadership, personality of leaders and characteristics of leaders. There were also deliberations on leadership contracts.



Workshop on Cost of Poor Quality, November 2013 – Chennai

The workshop covered topics such as cost of quality, detection of defects, occurrence and recurrence, cost of conformance and non-conformance, identifying hidden cost, prevention and appraisal cost, total quality cost and several related concepts.

Training Programme on Process Capability Analysis, November 2013 – Jamshedpur

The objective of the training session was to introduce the normal distribution, understand and calculate Cp&Cpk, use of mini tab for calculations, exercises and tests, attribute process capability and use of sigma calculator.

Training Programme on Statistical Process Control, November 2013 – Jamshedpur

ACMA, Eastern Region, organised a short training programme on SPC for middle level executives. The objective of the training session was to make the delegates understand SPC, control charts, control chart tests and interpret results, construct and implement control charts.



Training Programme on Product and Process Improvement through PFMEA, November 2013 – New Delhi

The programme was conducted with the objective of making participants understand the concept of PFMEA, increase consumer confidence in the product and process, equip the engineers to address potential problem areas, enhance root cause analysis, reduce the cost of quality and non-value operations, and initiate mistake proofing.

Training Programme on 'Low Cost Automation for Productivity Enhancement', November 2013 – Ahmedabad



To understand low cost automation in detail, ACMA, Western Region, organised two day training programme. The training was conducted for Head of Departments, Managers, Engineers, Senior Technicians and Executives from design and development, process planning, application engineering and quality assurance. The objective was to understand how low cost automation technology produces major result and makes companies competitive.

First Batch of 5 Day Certification Course on 'Train the Trainer – Productivity Improvement', December 2013 – New Delhi

The programme, which is an outcome of knowledge gathered over a period by the ACT counsellors, was designed for 5

days over a period of 5 months where the participants were judged on the basis of their presentations made on different case studies during the closing ceremony.

Workshop on Measurement System Analysis (MSA), December 2013 – New Delhi

ACMA, Northern Region, organised one day workshop on MSA. It evaluates test method, measuring instruments and process of obtaining measurements to ensure integrity of data used for analysis and to understand the implications of measurement error for decisions made about product or process. MSA allows one to quickly determine areas of excellence and areas where improvements are needed.



Workshop on Cost of Poor Quality, December 2013 – Coimbatore

ACMA, Southern Region, organised this workshop exclusively for members based in Coimbatore. The workshop defined the concept of COPQ and provided insights into the prevention and detection of defects, occurrence and recurrence, cost of conformance and non-conformance, identifying hidden cost, prevention and appraisal cost, an internal and external failures.



Workshop on Leadership Development, December 2013 – Bangalore

ACMA, Southern Region, organised a special workshop on leadership development which was designed and aimed

at the middle management level. It covered concepts like expectation audit, leadership techniques, leadership styles, and roles and responsibilities of leaders. The programme expressed the need to develop leaders and highlighted the ways to counter challenges attached to it.

Module-4 of 8th Batch – Six Sigma Black Belt Certification Programme Level 1, December 2013 – Pune

The module, touched upon factorial analysis to find out the optimal setting using Minitab and Excel for doing multi-various analysis. The session briefed participants on topics such as how to validate the cause and improve quantity.



Workshop on Productivity Improvement through Shop Floor Management, December 2013 – Bangalore

ACMA conducted these workshops with Bosch Training Institute. The representation focused on basic 5S, inventory management and time management techniques. Participants were also exposed to concept like CIP, Poke Yoke and JIT .

2nd and 3rd Module of Certification – Value Stream Management, December 2013 & January 2014 – Pune

The faculty for the programme, touched upon material flow, information flow and time line. The participants learnt about value added time ratio, elements to be included in typical process data, process data box and how to calculate lead time. In the 3rd module, the session explained seven types of wastes and suggested waste elimination processes, kaizen, low cost automation and tact time.



Module-5 of 8th Batch – Six Sigma Black Belt Certification Programme Level 1, January 2014 – Pune

The module, explained the participants how to validate the pin-pointed cause(s) and quantification of improvement. Session explained the participants on variation analysis, identification of monitoring and control method to sustain the improvement and implementation of control method.

Training on Process and Product Improvement through PFMEA, January 2014 – Rudrapur

ACMA, Northern Region, organised one day training programme where participants were informed various process improvement techniques through case studies. The programme explained failure modes effect analysis (FMEA) as a step-by-step approach to identify possible failures in design, manufacturing or assembly process, or in product service

Training on Poka Yoke, January 2014 – Rudrapur

ACMA, Northern Region, organised one training programme that gave an insight on error proofing techniques, keeping the product quality error free by taking preventive steps and ensuring customer satisfaction.

Training Programme on Kaizen, January 2014 – Jamshedpur

ACMA, Eastern Region, organised a training programme for its member companies with an objective to make them understand 5S, Kaizen, create Kaizen flow diagram, use of Kaizen and deriving solutions from it.

**Training Programme on Understanding and Implementation of Value Stream Mapping – a powerful lean management tool, January 2014 – Chennai**

ACMA, Southern Region, organised a workshop to explain Kanban, capacity calculations and the use of VSM with an objective to understand the importance of reducing surplus inventory. The participants were exposed to the practical implementations of these techniques and their benefits using a live plant as a model.

Workshop on 'Establishing Quality Circle', January 2014 – Ahmedabad

Quality circle builds quality culture in an organisation by involving all employees in a continual improvement process. The training topics like defining a quality circle, explaining how the process works, how quality circles approach a problem, the problem solving tools, preparing projects and action plans and quality circle facilitation techniques.

**Training programme on Quality Initiatives to achieve Competitiveness, February 2014 – New Delhi**

ACMA, Northern Region, organised one day training programme with an objective to make participants understand the importance of quality and how to avoid recurrence of defects. The programme explained the 'process control' mechanism to maintain quality and also covered the '4P concept' and the 'Guidelines and Contents for preparing Operations Standards'



Practical Training Programme on Kaizen, February 2014 – Jamshedpur

ACMA, Eastern Region, organised a workshop on Kaizen with an objective to create awareness amongst delegates on issues including application of Kaizen, assessment of bottlenecks and how to eliminate them, understand the principles of Kaizen, how to fill Kaizen sheet and what are the standards to be maintained.

Workshop on HR for non HR Executives, February 2014 – Chennai

The workshop highlighted the basics of recruitment, selection and the interview process, the do's and don'ts at the time of interview, with equal focus on employee engagement and management skills. The topics were covered in detail with case studies and group exercises.

4th Module of Certification Programme: Value Stream Mapping, February 2014, Pune



The module 4 touched upon production lead time reduction through future state map and explained the concept of VSM future state map, guidelines to make value stream a lean process and suggested the need to develop continuous flow wherever possible.

Final Assessment and Certification Ceremony of the 8th Batch – Six Sigma Black Belt Certification Programme Level 1, February 2014, Pune

ACMA, Western Region,organised a programme that stretched over 7 months divided into 6 modules for 17 days



each. The programme saw a huge turnout and during the programme the faculty visited plants to check effectiveness and implementation of the learnings done by all the participants. The event concluded with distribution of the certificates to participants by regional Chairman.

Training Programme on Vendor Management: Selection, Auditing and Up-gradation, March 2014 – New Delhi

ACMA, Northern Region, organised a programme explaining Vendor Management which is a long term co-operative effort between a client and its vendor. It is aimed at creating and maintaining a network of competent vendors. The development activities include vendor selection, assistance and training, for continuous up-gradation of vendors.

The programme covered topics that helped companies understand the different elements related to suppliers, which include selection cycle, single or multi supplier base, and selection procedure, supplier auditing criteria as per ISO9001/TS 16949, 8D, CAPA, and Why-2 Analysis.



Training Programme on Process Approach and Performance Monitoring: Balanced Scorecard, March 2014 – New Delhi

ACMA, Northern Region, organised a training programme explained the benefits of Balance Score Card, which facilitates in identifying the opportunity for improvement, process characterisation and timely communication of performance for all.

Workshops on costing and budgeting, March 2014 – Coimbatore and Chennai



ACMA, Southern Region, organised two workshops that covered varied topics on both costing and budgeting including cost management, definition of cost, classification of cost, direct and indirect cost, fixed and variable cost, semi variable costs, break even analysis, direct costing and absorption costing.

Thought Leadership, Knowledge Initiatives & Competitions

ACMA National Conference on Accelerating Export Growth: Leveraging Market Dimensions, August 2013 – New Delhi

The conference addressed issues related to the challenges and opportunities in the global market for Indian auto component companies. Given that with the recent rupee depreciation it has opened up increased global opportunities for Indian companies.



However, it was important for the auto component industry in India to move up the value chain through focused product development and IPR to remain globally competitive. It also highlighted that the recently announced trade policy had several measures to promote exports of Indian auto components and the government has been largely supportive of the industry. The way forward required companies to focus on R&D, better engineering and enhanced product development that could create unique competitive positioning in the global market. There was a need to graduate from the present build – to – print model to one that is described as art – to – part.

Experts at the conference also deliberated on opportunities and challenges in specific new potential markets for exports including NAFTA, Brazil, Central Europe, CIS, Africa, Asia and ASEAN.

Knowledge Sharing Session – ‘Sustainability, its relevance and challenge for growth of the automotive industry in India’, August 2013 – Pune



Looking at the many challenges that the auto industry is facing at present, sustainability is one of them. To understand this better, ACMA, Western Region, and DuPont India Innovation Centre organised a knowledge sharing session primarily through a panel discussion. The panellists included Dr Harold Snyder, DuPont Asia Pacific Technical Director, Shanghai, China, Dr Rajeev Vaidya, President Du Pont, South Asia and ASEAN, Mr Shrikant Marathe, Director, ARAI, and M S Shankar, Director Innovation, Anand Automotive Limited.

Annual Regional HR Conclave 2013, August 2013 – Chennai

The Annual Regional HR Conclave ‘Driving into the future’ that saw over 50 HR professionals from ACMA member companies across Chennai, Bangalore and Coimbatore. They exchanged views and ideas on the changing business environment and its effects on the IR landscape, future of employee engagement and the agenda for HR in turbulent times.



The conclave aimed to encourage the management and HR to work in tandem in order to enhance the competitiveness of employees, workers, management and the organisation.

Special Programme in Kannada on Labour Laws, Factories and Trade Union’s Act, September 2013 – Bangalore

ACMA, Southern Region, designed a special programme in Kannada on labour laws, Factories and Trade Union’s Act for the benefit of its members. This was primarily aimed at educating the union leaders, union executives, shop floor supervisors and workers on the subject. HR and IR

employees also benefited from this and enhanced their understanding of the nuances of the law.

Knowledge sharing amongst members in Gujarat, September 2013 – Ahmedabad

To provide a platform for knowledge sharing, networking and bringing the auto fraternity in the region together for mutual cooperation, ACMA, Western Region, organised the first ever Kaizen Contest and Conference. The conference saw active participation from eminent auto-component companies in Gujarat.



Sharing of Best Practices Visit on Manufacturing Excellence to Comstar Automotive Technologies Private Limited, September 2013 – Chennai

ACMA, Southern Region, organised a visit and interaction with Comstar Automotive Technologies Pvt Ltd – winner of the ACMA Bronze Trophy on Excellence in manufacturing and Gold trophy Winner for Exports. Various initiatives by the company on its journey of excellence were presented including leadership focus, manufacturing process and operations, support functions and performance results. The procedures on TPM, CTPM worksheet, in-house rejection methodology and use of P-chart, zero defects and Poka Yokes.



YBLF's Plant Visit and Interactive Session with Mr L Ganesh, Past President ACMA and Mr Harish Lakshman, President ACMA, November 2013 - Chennai

Recognising that plant visits are one of the most effective way to learn the technology behind any product, ACMA organised a plant visit of its YBLF members to Rane Madras Limited. The 22 member delegation got insights into leadership, corporate governance and succession planning through the interactions and case studies presented to them. The members were given exposure of high quality levels and excellence in business process at Rane Madras that got the company the prestigious Deming Prize. The delegation undertook a plant tour to understand to new technology and various processes adopted to minimise waste and effort.



Plant visit to Bohra Rubber and Ecocat India, ACMA award winners for excellence in technology, quality and productivity, December 2013 – Faridabad



The MSME committee of ACMA organised a plant visit to two of the award winning member companies. This provided exposure to the MSME companies to learn from the experiences of these two companies and their journey through challenging times.

Design awareness seminar on Design Clinic Scheme from Ministry of MSME, December 2013 – Rudrapur

ACMA and National Institute of Design (NID) jointly organised this seminar with the objective to bring Indian manufacturers and design professional on a common platform to provide expert advice and cost-effective solutions to design problems. This would in turn bring improvements to the final product and add value to existing or new products.

First Low Cost Automation (LCA) Competition in Gujarat, December 2013 – Ahmedabad

In continuation with the efforts to enhance the organisation's reach among the members of the Western Region, ACMA organised first ever Low Cost Automation Competition to provide a platform for knowledge sharing and networking. All leading auto component manufacturers of Gujarat participated at the competition.

**5th Annual Regional Kaizen Competition, December 2013 – Chennai**

A record number of 90 engineers were awarded at this event organised by ACMA, Southern Region. Over 150 participants including the delegates witnessed, shared and learnt from the experience of the presenters at the contest. The presentations included six from the SSI category in the areas of productivity, cost, quality, delivery and safety.

**Conference on 'Process Excellence – the Way Ahead', December 2013 – Pune**

ACMA, Western Region, organised this event that focused on the importance of process excellence in the present dynamic market scenario, cost of optimisation of products, innovation and breakthrough solutions for better results. The objective

of the conference was to develop tier 2/3 supplier base to survive in the future, and it also pointed out that the key to business profitability is having strong process deployment.

YBLF's plant visit to Varroc Lighting and Interactive Session with Mr Tarang Jain, MD, Varroc Engineering Pvt Ltd, December 2013 – Pune

The plant visit and interaction focused on 'Varroc's vision and journey of going global'. The interaction with Mr Jain provided a deep insight of the stage wise growth of the group from a turnover of Rs.1.2 crore to its present level of Rs.7,000 crore. The plant visit also exposed the members to the state of the art technology at Varroc and the Company's best practices including matrix management, layered audit systems and 8D transparent tracking systems.

**Interaction with the purchase team and a visit to the rail coach factory, January 2014 – Kapurthala**

Continuing with the efforts and exploring the opportunities in the Railways, the ADR Committee of ACMA organised an interaction and visit to Rail Coach factory, Kapurthala. ACMA along with McKinsey jointly conducted a study on Aerospace, Defence and Railways (ADR) to identify opportunities for Indian suppliers. The study concluded that the parts required in construction equipment have a sizable demand which the component suppliers can explore as a potential market.

Salary Survey 2013-14, February 2014

Given the positive feedback received from the participants for the 1st Salary Survey, ACMA partnered with Deloitte to conduct a 2nd Survey on HR Practices and total remuneration for its members. 55 member companies participated from all the regions. Based on the survey, the top 4 HR talent concerns were developing leaders and succession planning; sustaining employee engagement and morale; connecting HR and talent with business critical priorities; and creating career paths and challenging job opportunities for employees. The median salary increment across sectors was projected at 11.3%.

Visit to Atul Auto, February 2014 – Rajkot

To understand the growth plans, discuss and learn the issues pertaining to supply of components, ACMA organised a visit and interaction with Atul Auto, Rajkot. There was also an extensive tour around the plant.



Visit to Greaves Cotton, February 2014 – Aurangabad

A 20 member delegation visited Greaves Cotton where the delegates were introduced to the insights of business opportunities in this sector and also got first-hand experience of optimal space utilisation, which is a characteristic of the plant at Aurangabad. During the visit, the delegates got a flavour of the optimal space used at the plant having visited the assembly line, raw material inspection site, test cell, storage machine shop and laboratory.



Visit to Mahindra Gears and Transmissions, February 2014 – Rajkot

ACMA, Western Region, in the past has organised many interactive activities to provide unique experience and a learning curve for its members. In line with this, it organised a visit and interaction with Mahindra Gears and Transmissions. During the visit, the delegates got to see the assembly line, heat treatment and metrology lab. They developed an understanding of the Company's strong forte of short product development cycling utilising the cellular manufacturing layout, which helps to minimise material movement and inventory.

3rd Single Minute Exchange of Dies (SMED) Competition, February 2014 – Bangalore

ACMA, Southern Region, organised 3rd Single Minute Exchange of Dies competition to enhance team building and help companies understand and reduce non-value added activities through case studies. 16 teams from ACMA's member companies participated to showcase their improvements in the area of their work by exhibiting cost effective ways to reduce process to a single digit changeover.



Annual Safety Convention, March 2014 – Chennai

ACMA, Southern Region, organised its Annual Safety Convention at the Renault Nissan Automotive India Private Limited (RNAIPL) facility. The delegates also visited the premises of Daimler Commercial Vehicles Private Limited. 42 delegates from 20 member companies across regions participated. Apart from the plant visits a presentation on safety measures was given by industry experts on importance and relevance of safety in production systems.



Regional Convention on Safety, March 2014 – Bangalore

Observing March as safety month, ACMA, Southern Region, organised regional safety convention. The programme was held at Bosch Ltd along with a visit to the plant to understand the safety measures undertaken by the company. The presentation explained how safety should be followed and implemented. It stressed that there is a need to change workers' mind set so that they believe in safety and encourage others to follow.

Workshop on Product Liability, Warranty and Recall, March 2014 – Bangalore

ACMA, Southern Region, organised this workshop, which aimed to educate the members with issues related to liability, distribution of products and problems associated with warranty. The programme was organised based on feedback from the globalisation and Trade Fair Committee's advise to create awareness amongst members on this critical issue. At the session, representatives from insurance companies and risk management advisory shared their experience with the members.

**3rd MSME Summit on 'Managing Volatilities, Strategies for MSMEs', March 2014 – New Delhi**

ACMA with the Ministry of Micro, Small and Medium Enterprises jointly organised this summit. The summit was organised to assess the current business scenario and how component manufacturers, especially the small and medium

enterprises, can harness the challenging environment to their benefit.

Visit to JSW, March 2014 – Vijaynagar

The Raw Materials Committee organised this visit to strengthen the ongoing dialogue with raw material suppliers and to update members with various developments in the steel sector. The members were taken on an exhaustive tour of the plant.

**2nd Regional Low Cost Automation (LCA) Competition, March 2014 – Pune**

Low cost automation is a technology that creates a certain degree of automation around existing equipment, tools, methods and people using mostly standard components available in the market. This competition organised by ACMA, Western Region, provided a platform for cross learning which was well appreciated by the participants.





Knowledge Pool Developed through Syndicated Studies

SUBJECT	CO-ORDINATING COMMITTEE
Study on 'Achieving High Performance in Turbulent Times – Creating Advantage Out of Adversity'	Public Policy and Government Affairs, Knowledge Partner Engagements
ACMA Membership Survey	Membership Committee
Strategy to develop Indian automotive exports to China	Globalisation Committee in collaboration with the Department of Commerce
Salary Survey of Indian Auto-component Industry	HR Committee
AMP Review 2016-2026	Public Policy and Government Affairs, KP Engagements
Survey of ACMA-IMTMA companies on their competitiveness and futuristic approach with respect to quality, technology and capacity requirements of the auto-component industry	IMTMA Committee
Study on Aerospace and Defence Sector: Opportunities and Challenges for the auto-component industry	Aerospace, Defence and Railways Committee
Auto Components in India: Globalisation and the Imperative for Competitiveness	Public Policy and Government Affairs, KP Engagements

PEOPLE AT ACMA

PAST PRESIDENTS

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

EXECUTIVE COMMITTEE

President	Vice President	Immediate Past President
Mr. Harish Lakshman	Mr. Ramesh Suri	Mr. Surinder Kanwar
Rane TRW Steering Systems Ltd.	Global Autotech Ltd.	Bharat Gears Ltd.

Elected Members

Member	Company
Mr. Beni Daga	Baynee Industries
Mr. Soumitra Bhattacharya	Bosch Ltd.
Mr Krishna Kumar Srinivasan	Eaton Industrial Systems Pvt. Ltd.
Mr. Ranjot Singh	Emdet Jamshedpur Pvt. Ltd.
Mrs. Pilloo C Aga	Gold Seal Engineering Products Pvt. Ltd.
Mr. Pranav Kapuria	Hi-Tech Gears Ltd.
Mr. Vijay B Pusalkar	Indo Schottle Auto Parts Pvt. Ltd.
Mr. S K Arya	Jay Bharat Maruti Ltd.
Mr. S Ganesh	Liners India Ltd.
Mr. Deepak Jain	Lumax Industries Ltd.
Mr. Rattan Kapur	Mark Exhaust Systems Ltd.
Mr. Sudhir Munjal	Munjal Auto Industries Ltd.
Mr. U S Ahuja	New Swan Enterprises
Mrs Harshbeena S Zaveri	NRB Bearings Ltd.
Mr. F R Singhvi	Sansera Engineering Pvt. Ltd.
Mr. Sunjay Kapur	Sona Koyo Steering Systems Ltd.
Mrs. Shradha Suri Marwah	Subros Ltd.

Co-opted Members

Member	Company
Mr. Vikram Mohan	Pricol Ltd.
Mr. Nishant Behera	RSB Transmissions (I) Ltd.
Mr. Harish K Sheth	Setco Automotive Ltd.
Mr. Umesh Talwar	Talbro Automotive Components Ltd.
Mr. Arun Gupta	Technico Industries Ltd.
Mr. S J Taparia	The Supreme Industries Ltd.
Mr. K G Mohan Kumar	Toyota Kirloskar Auto Parts Pvt. Ltd.

Special Invitees

Member	Company
Mr. Amit B Kalyani	Bharat Forge Ltd.
Mr. SriramViji	Brakes India Ltd.
Mr. Piyush I Tamboli	Investment & Precision Castings Ltd.
Mr Sanjay Malhotra	Jumps Auto Industries Ltd.
Mr Mayank Kejriwal	Kiswok Industries Pvt. Ltd.
Mr J Sridhar	Magal Engg. Tech Pvt. Ltd.
Mr. Rajat Bhandari	Makino Auto Industries Pvt. Ltd.
Mr Pravin Malhotra	Nipman Fastener Industries Pvt. Ltd.
Mr. Suman Kant Munjal	Rockman Industries Ltd.
Mr. Jagdeep Singh Rangar	Stork Rubber Products Pvt. Ltd.
Mr. Ravi Machani	Stumpp Schuele & Somappa Springs Pvt. Ltd.
Mr. Arvind Goel	TATA Auto Comp Systems Ltd.
Mrs. Gayathri Sriram	Ucal Products Pvt. Ltd.
Mr. Tarang Jain	Varroc Engineering Pvt. Ltd.
Mr. P Kaniappan	WABCO India Ltd.

Regional Chairpersons

Eastern Region	
Mr. Killol Kamani	Samarth Engineering Co. Pvt. Ltd.
Northern Region	
Mr. Nirmal K Minda	Minda Industries Ltd.
Southern Region	
Mr. Arvind Balaji	Lucas-TVS Ltd.
Western Region	
Mr. Sandeep Balooja	(Anand Automotive Group) Gabriel India Ltd.

Deputy Regional Chairpersons

Eastern Region	
Mr. Sanjay Sabherwal	Metaldyne Industries Ltd.
Northern Region	
Mr. Sunil Arora	Abilities India Pistons & Rings Ltd.
Southern Region	
Mr. Ram Venkataramani	IP Rings Ltd.
Western Region	
Mr. Kirti Rathod	Delux Bearings Ltd.

ZONAL CO-ORDINATORS

Eastern Region

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

Northern Region

Name	Zone	Company Name
Sunil Arora	UP	Abilities India Pistons & Rings Ltd
Sanjay Malhotra	Gurgaon & Rajasthan	Jumps Auto Industries Ltd
Rajesh Jain	Rohtak & Hissar	Lakshmi Precision Screws Ltd
Bima Bedi	Uttarakhand	Minda Industries Ltd
US Ahuja	Punjab & Chandigarh	New Swan Enterprises
Satish Garg	Faridabad	Sadhu Forgings Ltd

Southern Region

Name	Zone	Company Name
S Ganesh	Andhra Pradesh	Liners India Ltd
A Gopikumar	Karnataka & Hosur	Bosch Ltd
Vikram Mohan	Coimbatore	Pricol Ltd
J Sridhar	Chennai	Megal Engg. Tech Pvt Ltd

Western Region

Name	Zone	Company Name
Piyush I Tamboli	Gujarat	Investment & Precision Castings Ltd
Balbir Singh Chhabra	Nashik	Right Tight Fastners Pvt Ltd
Sunil Kumar	Pithampur/Dewas (MP)	AVTEC Limited - Power Unit Plant
AnirbanMukherji	Pune	Bharat Forge Ltd
PawanChodary	Aurangabad	Hindustan Composites Ltd

WORKFORCE 2013-14**Head Office**

Abhishek Chopra

Amit Mukherjee

Anjali Nair

Anupam Kaushik

Ashok Kumar

Ashok Kumar Kamath

Ashwani Kumar

Binny Tomy

Chandu Chaudhary

Deepak Rajput

Eckta

Harish Kapoor

Jairaj Kumar

Mayank Nigam

Meenakshi Narayanan

Monika S. Handa

Niladri Mallick

Pooja Sharma

Prem Kumar

Rajat Gaur

Rajeshwar Rai

Sapna Vijn

Seema Babal

Subhag Naqvi

Sushil Rajput

Vijay Kanojia

Vikram Saigal

Vinnie Mehta

Sreeju Premarajan

Harkaran Malhotra

Act Division

K. P. S. Raghuvanshi

Mahesh Gupta

Atul Kr. Gupta

Deepti Panikker

Jitender Rana

V K Sharma

G Ananthkrishnan

K. R. Bhoopalan

Dinesh A. Vedpathak

Aniket Khasnis

K Chandrasekhar

Sakshi S. Karkamkar

Sunil Mutha

Uday S Harite

Sapana Milind Baravkar

Eastern Region

Rahul Kumar

Vadivelan Gounder

Yogita Satpathy

Northern Region

Hansraj Sarma

Lokesh Raina

Rupender Kaushik

Sheetal Gupta

Southern Region

Anil Kumar Unni

Priya Sriram

R. Hariram

R. Raja Shekhar

G Mani

Neeraja S. Rao

Western Region

Ashwani Jotshi

Ashwini Anupam Kulkarni

Jeetendra Kumar Singh

Lincy Verghese

Sudesh Janardhan Sutar

Sahas Appa Padave

Vijith Vijayan Nair

Publications

ACMA regularly publishes its newsletters such as Auto News, International Newsletter, ACT Now, Customs & Exim Newsletter and Indirect Tax Newsletter that provides insights into developments related to the auto-component sector and also covers activities undertaken by the association

At the 53rd Annual Session, the joint ACMA - Accenture study on 'Achieving High Performance in Turbulent Times: Creating Advantage from Adversity' was launched. The study elucidated the VUCA environment comprising Volatility, Uncertainty, Complexity and Ambiguity, which characterises the present global manufacturing environment. Essentially, the study looked at how the auto-component industry in India can chart its course out of the present 'low sales growth – high inflation' situation.

Accenture - ACMA utilized Accenture's 'High Performance Business (HPB)' analysis framework to evaluate financial performance of auto-component companies during the period FY09 to FY12. The HPB analysis has identified companies, which have sustainably out performed their peers across business and economic cycles. Based on the HPB-analysis and interviews, the report has evolved a 'High Performance Business Framework' for the auto-component industry in India that specifies

- Where and how to compete?
- How 'hard to replicate' capabilities need to be developed for competitive advantage?
- What softer aspects of leadership and culture need to be nurtured?

The framework provides detailed customized actions to be taken by players across tiers and sizes to achieve high performance. The research shares actions for OEMs, ACMA and the government towards creating an enabling ecosystem for the auto-component manufacturers to achieve high performance.

ACMA released the 29th Edition of Buyers Guide and the Source India CD in the year 2014. Buyers Guide and the Source India CD (Soft version of ACMA Members' Directory–Buyers Guide) are the only sourcing guides for the auto component industry in India.



LIST OF MEMBERS

A		
A Raymond Fasteners India Pvt. Ltd.	ANG Industries Ltd.	Balu India
A.G.Industries Pvt. Ltd.	Anu Industries Ltd.	Banco Products (India) Ltd.
Abilities India Pistons & Rings Ltd.	Apls Automotive Industries Pvt. Ltd.	BASF Catalysts India Pvt. Ltd.
Accurate Products Corporation Pvt. Ltd.	ARB Bearings Ltd.	Baynee Industries
Ace International	Arvind Engineering Works Ltd.	Behr India Ltd.
Acey Engineering Pvt. Ltd.	Asahi India Glass Ltd.	Benara Bearings & Pistons Ltd.
Aditya Auto Products & Engineering (I) Pvt. Ltd.	Ashok Iron Works Pvt. Ltd.	Benara Udyog Ltd.
Admach Auto India Ltd.	Ashra Consultants Pvt Ltd.	Besmak Components Pvt. Ltd.
Advance Forgings Pvt. Ltd.	Ashutosh Rubber Pvt. Ltd.	Besoto Starting Systems Pvt. Ltd.
Advik Hi-Tech Pvt. Ltd.	ASK Automotive Pvt. Ltd.	Best Koki Automotive (P) Ltd.
Agrasen Engineering Industries Ltd.	ASL Industries Pvt. Ltd.	Beta Industrial Products
Agrim Components Pvt. Ltd.	Aspee Precision Components Pvt. Ltd.	Bharat Forge Ltd.
Aisin Automotive Karnataka Pvt. Ltd.	Aspee Springs Ltd.	Bharat Gears Ltd.
Akal Spring Ltd.	Associated Manufacturing Company	Bharat Seats Ltd.
Akar Tools Ltd.	Aurangabad Electricals Ltd.	Bhavani Industries
ALF Engineering Pvt. Ltd.	Auro Plastic Injection Moulders Pvt. Ltd.	Bill Forge Pvt. Ltd.
Alfa Flexitubes Pvt. Ltd.	Auto Cluster Development and Research Institute Ltd.	Bimetal Bearings Ltd.
Alicon Castalloy Limited	Auto Ignition Ltd.	Bindra Motors Pvt. Ltd.
All India Rubber Industries Association	Auto Pins (India) Ltd.	BMC Metalcast Ltd.
Allena Auto Industries Pvt. Ltd.	Auto Shell Perfect Moulder Ltd.	Bohra Rubber Pvt. Ltd.
Allied Nippon Ltd.	Autocomp Corporation Panse Pvt. Ltd.	Bollhoff Fastenings Pvt. Ltd.
Allison Transmission India Pvt. Ltd.	Autocop (India) Pvt. Ltd.	Bond Safety Belts
Almighty Auto Ancillary Pvt. Ltd.	Autofit Pvt. Ltd.	Bony Polymers Pvt. Ltd.
ALP Nishikawa Company Ltd.	Autoflex Pvt. Ltd.	Borgwarner Cooling Systems India Pvt. Ltd.
Alpha Drives	Autoline	Borgwarner Morse Tec India Pvt. Ltd.
Alphaa Springs Chennai (P) Ltd.	Autolite (India) Ltd.	Bosch Chassis Systems India Ltd.
Amalgamations Repco Ltd.	Autoliv India Pvt. Ltd.	Bosch Ltd.
Amar Autoengg. Pvt. Ltd.	Autometers Alliance Ltd.	Brakes India Ltd.
Ambattur Industrial Estate Manufacturers' Association (AIEMA)	Automotive Axles Ltd.	Brakewel Automotive Components (I) Pvt. Ltd.
American Axle and Manufacturing Services (I) Pvt. Ltd.	Automotive Valves Pvt. Ltd.	Brembo Brake India Pvt. Ltd.
Ample Auto Tech Pvt. Ltd.	Autostart India Pvt. Ltd.	Bright Autoplast Ltd.
Amtek Auto Ltd.	AVO Carbon India (P) Ltd.	Brose India Automotive Systems Pvt. Ltd.
Amul Industries Pvt. Ltd.	AVR Valves Pvt. Ltd.	Bundy India Ltd.
AMW Auto Component Ltd.	AVS Brake Linings Pvt. Ltd.	
Anand Automotive Ltd.	Avtec Ltd.	C
Anand Motor Products Pvt. Ltd.	Axles India Ltd.	C.M. Smith & Sons Ltd.
Anand NVH Products (P) Ltd.		Calex Auto
Anand Piston International	B	Caltherm Thermostats Pvt. Ltd
	Badve Engineering Ltd.	Carl Bechem Lubricants (India) Pvt. Ltd.
	Bajaj Motors Ltd.	Carrier Wheels Pvt. Ltd.

Ceratizit India Pvt. Ltd.

Chamber of Marathwada Industries and Agriculture

Champak Plastics Pvt. Ltd.

Chandok Automotive Manufacturers Ltd.

Chaphekar Engineering Pvt. Ltd.

Chopra Autotech 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 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.

Daewon India Autoparts Pvt. Ltd.

Dali & Samir Engineering Pvt. Ltd.

Dana India Pvt. Ltd.

DCM Engineering Products

Dell'orto India Pvt. Ltd.

Delphi Automotive Systems Pvt. Ltd.

Delphi-TVS Diesel Systems Ltd.

Deltronix India Ltd.

Delux Bearings Ltd.

Demanik Enterprises

Denso International India Pvt. Ltd.

Denso Kirloskar Industries Pvt. Ltd.

Deusch Motocomp Pvt. Ltd.

Devendra Exports Pvt. Ltd.

Devilog Systems (India)

Dhanjal Impex Pvt. Ltd.

Dhoot Transmission Pvt. Ltd.

Dipty Lal Judge Mal Pvt. Ltd.

Disa India Ltd.

DME (India) Pvt. Ltd.

Donaldson India Filter Systems Pvt. Ltd.

Duroshox Pvt. Ltd.

Durovalves India Pvt. Ltd.

DVS Industries Pvt. Ltd.

Dyna-K Automotive Stampings Pvt. Ltd.

Dynamatic Technologies Ltd.

E

E.I. Dupont India Pvt. Ltd.

Eaton Industrial Systems Pvt. Ltd.

Eco Auto Components Ltd.

Ecocat (India) Pvt. Ltd.

Elcomponics Sales Pvt. Ltd.

Electrica Engineers (India) Pvt. Ltd.

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

Elofic Industries Ltd.

Emdet Jamshedpur Pvt. Ltd.

Emitec Emission Control Technologies (I) Pvt. Ltd.

Emkay Automobile Industries Ltd.

EmmbrosAutocomp Ltd.

Endurance Technologies Pvt. Ltd.

Engineering Technologies

Escorts Ltd.

Essae Digitronics Pvt. Ltd.

Estee Auto Pressings Pvt. Ltd.

Excel Polymotive

Exedy India Ltd.

Exotech Zanini Industries Pvt. Ltd.

F

FAG Bearings India Ltd.

Fairfield Atlas 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.

Fine Blanking Pvt. Ltd.

Flash Electronics (I) Pvt. Ltd.

Fleetguard Filters Pvt. Ltd.

Flowwell Castings Pvt. Ltd.

Flywheel Ring Gears Pvt. Ltd.

Foundation Brake Manufacturing Ltd.

Friends Auto (India) Ltd.

Friends Castings Pvt. Ltd.

G

G B Rubber Products

G I Auto Pvt. Ltd.

G. S. Auto International Ltd.

Gabriel India Ltd.

Gajra Gears Pvt. Ltd.

Galaxy Bearings Ltd.

Galaxy Indicators (I) Pvt. Ltd.

Gargs Engineers Ltd.

Gatiman Auto Pvt. Ltd.

Gearock Forge Pvt. 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.

GNA Axles Ltd.

GNA Duraparts Ltd.

GNA Udyog Ltd.

Gold Seal Engineering Products Pvt. Ltd.

Goldy Precision Stampings Pvt. Ltd.

Grace Infrastructure Pvt. Ltd.

GrazianoTrasmissioni India Pvt. Ltd.

Greenfuel Energy Solutions Pvt. Ltd.

Gulati Auto Electricals Pvt. Ltd.	India Japan Lighting Pvt. Ltd.	K
Guru Nanak Auto Enterprises Ltd.	India Nippon Electricals Ltd.	K.M.P. Manufacturing Company
	India Pistons Ltd.	K.R. Industries
H	Indian Diecasting Industries	Kafila Forge Ltd.
Haldex India Ltd.	Indication Instruments Ltd.	Kalra Overseas & Precision Engineering Ltd.
Halla Visteon Climate Systems India Ltd.	Indo Autotech Ltd.	Kalyani Forge Ltd.
Halonix Ltd.	Indo-Schottle Auto Parts Pvt. Ltd.	Kamal Rubplast Industries Pvt. Ltd.
Happy Steels Pvt. Ltd.	Indo-Shell Mould Ltd.	Kar Mobiles Ltd.
Harita Seating Systems Ltd.	Indo-US MIM Tec. Pvt. Ltd.	Kavia Engineering Private Ltd.
Harman International (India) Pvt. Ltd.	Industrial Engineering Syndicate	Kay Jay Forgings Pvt. Ltd.
Harsha Engineers Ltd.	Industrial Forge & Engineering Co. Ltd.	Keihin Panalfa Ltd.
Hella India Automotive Pvt Ltd.	Industrial Rubber Products	Kems Forgings Ltd.
Hella India Lighting Limited	Industrial Rubber Products Pvt. Ltd.	Kern-Liebers Springs & Stampings Pvt. Ltd.
Helvoet Rubber & Plastic Technologies (India) Pvt. Ltd.	Industrias Del Recambio India Pvt. Ltd.	KIE Engineering Pvt. Ltd.
Hero Motors Ltd.	Infineon Technologies India Pvt. Ltd.	KiranUdyog
Highco Engineers (P) Ltd.	Injectoplast Pvt. Ltd.	Kirat Plastics Pvt. Ltd.
Highway Industries Ltd.	Innova Rubbers Pvt. Ltd.	Kirloskar Toyota Textile Machinery Pvt. Ltd.
Hilux Auto Electric Pvt. Ltd.	Insight Engineering Systems Pvt. Ltd.	Kiswok Industries Pvt. Ltd.
Hi-Lux Automotive Pvt. Ltd.	Insulation & Electrical Products Pvt. Ltd.	Knorr-Bremse Systems for Commercial Vehicles India Pvt. Ltd.
Hinduja Foundries Ltd.	Interface Microsystems	Kongovi Electronics Pvt. Ltd.
Hindustan Composites Ltd.	Inteva Products India Automotive Pvt. Ltd.	Kores (India) Ltd.
Hindustan Hardy Spicer Ltd	Investment & Precision Castings Ltd.	KOSTAL NTTFF Automotive India Pvt. Ltd.
Hirschvogel Components India Pvt. Ltd.	IST Ltd.	Koyo Bearings India Pvt. Ltd.
Hi-Tech Engineering Systems Pvt. Ltd.		Krishna Auto Industries
Hi-Tech Gears Ltd.	J	Krishna Maruti Ltd.
Hodek Vibration Technologies Pvt. Ltd.	J. K. Fenner (India) Ltd.	KSPG Automotive India Pvt. Ltd.
Honeywell Turbo Technologies India Pvt. Ltd.	Jagan Lamps Ltd.	KSS Abhishek Safety Systems Pvt. Ltd.
Horizon Industrial Products Pvt. Ltd.	Jai Bhavani Mata EngitechPvt. Ltd.	Kulkarni Engineers
Huf India Pvt. Ltd.	Jainendra Automotive (P) Ltd.	Kunstocom (India) Ltd.
	Jamna Auto Industries Ltd.	Kusalava International Ltd.
I	Japji Enterprises	
I E Auto Industrial Enterprise Pvt. Ltd.	Jay Bharat Maruti Ltd.	L
I P Rings Ltd.	Jay Switches (India) Pvt. Ltd.	L. G. Balakrishnan & Bros. Ltd.
Ibex Products Pvt. Ltd.	Jay Ushin Ltd.	Lakhani Rubber Works
IFB Automotive Pvt. Ltd.	Jaya Hind Industries Ltd.	Lakshmi Precision Screws Ltd.
IFB Industries Ltd.	Jayashree Polymers Pvt. Ltd.	Lasko Engineering Co.
IM Gears Pvt. Ltd.	Jayem Auto Industries Pvt. Ltd.	Lear Automotive India Pvt. Ltd.
Imperial Auto Industries Ltd.	JBM Auto Ltd.	Lifelong India Ltd.
INA Bearings India Pvt. Ltd.	JBM Ogihara Automotive India Ltd.	Liners India Ltd.
India Forge and Drop Stampings Ltd.	Johnson Controls Automotive Ltd.	Litens Automotive (India) Pvt. Ltd.
	Johnson Matthey India Pvt. Ltd.	Lucas TVS Ltd.
	JtektSona Automotive India Ltd.	Luk India Pvt. Ltd.
	Jumps Auto Industries Ltd.	

Lumax Automotive Systems Ltd.
Lumax DK Auto Industries Ltd.
Lumax Industries Ltd.
Luthra Industrial Corporation

M

M & M Machine Craft Pvt. Ltd.
M.D. Industries
M.K. Auto Industries
M.V.D. Auto Components Pvt. Ltd.
Maadhav Automotive Fasteners Pvt. Ltd.
Macas Automotive
Machino Polymers Ltd.
Maco Pvt. Ltd.
Madhusudan Auto Ltd.
Madras Engineering Industries Pvt. Ltd.
Madras Radiators And Pressings Ltd.
Magal Engg. Tech Pvt. Ltd.
Magnet Marelli India Pvt. Ltd.
Magnum MI Steel Pvt. Ltd.
Mahindra Forgings Ltd.
Mahindra Gears & Transmissions Pvt. Ltd.
Mahindra Hinoday Industries Ltd.
Mahindra Sona Ltd.
MAHLE Engine Components India Pvt. Ltd.
Mahle Filter Systems (India) Ltd.
Maharatta Chamber of Commerce, Industries & Agriculture
Maini Precision Products Pvt. Ltd.
Makino Auto Industries Pvt. Ltd.
Manas Automotive Systems Ltd.
Mandap International Pvt. Ltd.
Mando India Ltd.
Mann and Hummel Filter Pvt. Ltd.
Mansons Automotive Rubber Pvt. Ltd.
Mantri Metallics 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.

Mehala Castings and Components Pvt. Ltd.
Mehta Engineers Ltd.
Menon and Menon Ltd.
Metaforge Engineering (India) Pvt. Ltd.
Metal Form
Metaldyne Industries Ltd.
Metalman Auto Pvt. Ltd.
Metalsa India Pvt. Ltd.
Micro-Machines
Micron Enterprises
Microsign Products
Minda Corporation Ltd.
Minda Furukawa Electric Pvt. Ltd.
Minda Industries Ltd.
Minda Sai Limited
Minda Silca Engineering Ltd.
Minda Stoneridge Instruments Ltd.
Minda Valeo Security Systems Pvt. Ltd.
Mindarika Pvt. Ltd.
Mitsuba Sical India Ltd.
Mitsubishi Electric Automotive India Pvt. Ltd.
Mittal Precision Autocomps Pvt. Ltd.
MK Autocomponents India Ltd.
MK Fasteners
MM Auto Industries Limited
Mobis India Ltd.
Motherson-Sumi Systems Ltd.
Mrinalini Industries
Mubea Automotive India Pvt. Ltd.
Multitech Auto Pvt. Ltd.
Mungi Brothers
Munjel Auto Industries Ltd.
Munjel Kiriu Industries Pvt. Ltd.
Munjel Showa Ltd.
Musashi Auto Parts India Pvt. Ltd.
Mutha Founders Pvt. Ltd.
Mutual Industries Ltd.

N

Napino Auto & Electronics Ltd.
Nash Products
Natesan Synchrocones Pvt. Ltd.
National Engg. Industries Ltd.

Nelcast Ltd.
Nelson Global Products India Pvt. Ltd.
Nemak Aluminium Castings India Pvt. Ltd.
Neolite ZKW Lightings Pvt. Ltd.
Neo Sym Industry Ltd.
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.
Nitto Denko India Pvt. Ltd.
Norma Group Products India Pvt. Ltd.
NRB Bearings Ltd.
NTF (India) Pvt. Ltd.

O

Ocap Chassis Parts Pvt. Ltd.
Oetiker India Pvt. Ltd.
OK Play India 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 Circle India Ltd.

Perfect Industries (India)	Rane (Madras) Ltd.	Sandeep Axles Pvt. Ltd.
Perfect Polymers	Rane Brake Lining Ltd.	Sandeep Metalcraft Pvt. Ltd.
Pinnacle Industries Ltd.	Rane Engine Valve Ltd.	Sanden Vikas India Ltd.
Plastic Omnium Auto Exteriors (India) Pvt. Ltd.	Rane NSK Steering Systems Ltd.	Sandhar Technologies Ltd.
Polyplastics Industries (India) Pvt. Ltd.	Rane TRW Steering Systems Ltd.	Sandhu Auto Engineers
Pooja Forge Ltd.	Ranee Polymers Pvt. Ltd.	Sanjeev Auto Parts Manufacturers Pvt. Ltd.
Poona Shims Pvt. Ltd.	Rangamma Steels & Malleables	Sankar Sealing Systems Pvt. Ltd.
Poona Tools Pvt. Ltd.	Rasandik Engg. Industries (I) Ltd.	Sansera Engineering (P) Ltd.
Porwal Auto Components Ltd.	Raunaq Automotive Components Ltd.	Santech Motors Pvt. Ltd.
PPAP Automotive Ltd.	Rawats International Pvt. Ltd.	Sathya Auto Pvt. Ltd.
Prabha Engineering Pvt. Ltd.	RDH Auto	Satyam Auto Components Ltd.
Pranav Vikas India Ltd.	Remsons Industries Ltd.	SawalkaKelPvt. Ltd.
Pravin Engineering Pvt. Ltd.	Rico Auto Industries Ltd.	Sebros Auto Pvt. Ltd.
Precision Auto Industries	Rico Castings Ltd.	Seema & Co.
Precision Autowares Pvt. Ltd.	Right Tight Fastner Pvt. Ltd.	Sekisui DLJM MoldingPvt. Ltd.
Precision Camshafts Ltd.	Rinder India Pvt. Ltd.	Sellowrap EPP India Pvt. Ltd.
Precision Engineering	Ring Plus Aqua Ltd.	Sellowrap Industries Pvt. Ltd.
Precision Tech Enterprises	Rising Sun International	Senior India Pvt. Ltd.
Premium Mouldings & Pressings Pvt. Ltd.	Rockman Industries Ltd.	Sensing Technologies Pvt. Ltd.
Presco-Mec Autocomp Pvt. Ltd.	Rojee-Tasha Stampings Pvt. Ltd.	SEP India Pvt. Ltd.
Pricol Ltd.	Rolex Rings Pvt. Ltd.	Setco Automotive Ltd.
Progressive Gear Industries (P) Ltd.	Roop Automotives Ltd.	Sharada Industries
Propel Metaltech	Roop Polymers Ltd.	Sharda Motor Industries Ltd.
PRS Permacel Pvt. Ltd.	Roots Industries India Ltd.	Sheet Shapers
Punch Ratna Fasteners Pvt. Ltd.	Rosmerta Autotech Pvt. Ltd.	Shivam Autotech Ltd.
Punjab Bevel Gears Ltd.	Rotex Automation Ltd.	Shivani Locks Pvt. Ltd.
Purofil Auto (India) Pvt. Ltd.	Roulunds Braking (India) Pvt. Ltd.	Showa India Pvt. Ltd.
	RSB Transmissions (I) Ltd.	Shree Amba Industries
	Rucha Engineers Pvt. Ltd.	Shriram Alpine Sales Pvt. Ltd.
	Rucha Technologies Pvt. Ltd.	Shriram Foundry Ltd.
		Shriram Pistons & Rings Ltd.
Q		Sigma Corporation (India) Ltd.
QH Talbros Ltd.		Sigma Freudenberg NOK Pvt. Ltd.
	S	Sigma Moulds & Stampings Pvt. Ltd.
	S. M. Auto Engineering Pvt. Ltd.	Sigma Vibracoustic (India) Pvt. Ltd.
	S. S. Engineering Works	Simmonds Marshall Ltd.
	S.K. Spring Co.	Singhbhum Machinometal Pvt. Ltd.
	S.M. Rolling Works	Singla Forging
	SAC Engine Components Pvt. Ltd.	SKH Metals Ltd.
	Sadhu Forging Ltd.	Sober Auto Industries
	Sainik Spring Works	SOGEFI MNR Filtration India Pvt. Ltd.
	Saint Gobain Glass India Ltd.	Somic ZF Components Ltd.
	Sakthi Auto Component Ltd.	Sona BLW Precision Forgings Ltd.
	Samarth Engg. Co. Pvt. Ltd.	Sona Koyo Steering Systems Ltd.
	Samson Industries	Soni Auto & Allied Industries Ltd.
	Sanatan Autoplast Pvt. Ltd.	
	Sanauto Engineers (India) Pvt. Ltd.	

Spaco Technologies (India) Pvt. Ltd.
 Special Engineering Services Ltd.
 Special Tools Pvt. Ltd.
 Spicer India Ltd.
 SPM Autocomp Systems Pvt Ltd.
 Spun Micro Processing (P) Ltd.
 Sri Bhavani Castings Ltd.
 SSV Valves
 Standard Radiators Pvt. Ltd.
 Steel Strips Wheels Ltd.
 Steelbird International
 Sterling Tools Limited
 Stork Auto Engineering Pvt. Ltd.
 Stork Rubber Products Pvt. Ltd.
 Stumpp Schuele & Somappa Springs Pvt. Ltd.
 Subros Limited
 Sudisa Foundry (P) Ltd.
 Sujan Cooperstandard AVS Pvt. Ltd.
 Sulzer Friction Systems India Ltd.
 Sumit Enterprises
 Sunbeam Auto Pvt. Ltd.
 Sundaram Auto Components Ltd.
 Sundaram Brake Linings Ltd.
 Sundaram Clayton Ltd.
 Sundaram Industries Ltd.
 Sundram Fasteners Ltd.
 Sunpac Auto (India) Pvt. Ltd.
 Sunstar Precision Forge Ltd.
 Super Circle Auto Ltd.
 Super Nova Auto Industries
 Super Seals India Ltd.
 Supercircle Pvt. Ltd.
 Suprajit Engineering Ltd.
 Supreme-Treves Pvt. Ltd.
 Suraj Components Pvt. Ltd.
 Suraj General Engineers (P) Ltd.
 Surya Springs

T

T.K. Precision Pvt. Ltd.
 Takata India Pvt. Ltd.
 Talbros Automotive Components Ltd.
 Talbros Cork Products Pvt. Ltd.
 Talbros Engineering Ltd.
 Tata Autocomp Systems Ltd.

Tata Consultancy Services Ltd.
 Tata Toyo Radiator Ltd.
 Taurus Flexibles Pvt. Ltd.
 Taylor Rubber Pvt. Ltd.
 TE Connectivity india Pvt. Ltd.
 Tech Auto Pvt. Ltd.
 Technico Industries Ltd.
 Technocrat Connectivity Systems (P) Ltd.
 Teksons Pvt. Ltd.
 Tenneco Automotive India Pvt. Ltd.
 Terminal Technologies (I) Pvt. Ltd.
 Tespa Tools Pvt. Ltd.
 Texspin Bearings Ltd.
 TG Kirloskar Automotive Pvt. Ltd.
 The Automobile Society (India)
 The Automotive Research Association of India
 The Supreme Industries Ltd.
 TKW Fasteners Pvt. Ltd.
 Tosy Auto Products
 Toyota Boshoku Automotive 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.
 Trigno Engineering Pvt. Ltd.
 Trim India Pvt. Ltd.
 TRW Sun Steering Wheels Pvt. Ltd.
 Tube Investments of India Ltd.
 Turbo Energy 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.
 UMC Auto Industries Pvt. Ltd.
 Uni Deritend Ltd.
 Unitech Machines Ltd.
 Universal Wire Forms
 Usha International Ltd.

USUI Susira International Private Ltd.

V

Vaid Elastomer Processors Pvt. Ltd.
 Valeo India Pvt. Ltd.
 Vanaz Engineers Ltd.
 Vardhman Metacast
 Varroc Engineering Pvt. Ltd.
 Varroc Polymers Pvt. Ltd.
 VE Commercial Vehicles Ltd.
 Vibrant Auto Components Pvt. Ltd.
 Vibromech Engineers and Services Ltd.
 Vib's India Pressing
 Victora Tool Engineers (P) Ltd.
 Vijayshree Autocom Ltd.
 Vikrant Auto Suspensions
 Vinayaka C.N.C. Centre (P) Ltd.
 Viral Engineers
 Visteon Automotive Systems India Pvt. Ltd.
 VNM Polymers Pvt. Ltd.

W

WABCO India Ltd.
 Wahi Sons Pvt. Ltd.
 Western Auto Spares
 Western Thomson (India) Ltd.
 Wheels India Ltd.
 Wings Automobile Products (Pvt.) Ltd.
 Wire Rings
 Wriston Elastomers (P) Ltd.

Y

Yazaki India Ltd.
 Yeshshree Press Comps. Pvt. Ltd.
 York Transport Equipment (India) Pvt. Ltd.
 Yoshama And Company Pvt. Ltd.

Z

Z F India Pvt. Ltd.
 Zenith Forge Pvt. Ltd.
 ZF Steering Gear (India) Ltd.







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