ACMA
Automotive Component Manufacturers Association of India

February-March 2018

AUTONEWS

Vol 10 No 71

14th AUTO EXPO 2018
COMPONENTS
8-11 FEBRUARY 2018
Pragati Maidan, New Delhi, India
www.autoexpo.in

Cover Story

The 14th Auto Expo- 'Components Show'

Showcased India's potential of delivering 'Quality' 'Technology'

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EDITOR'S NOTE

The February – March 2018 Auto news issue marks the 14th anniversary of Auto Expo Components Show. It was heartening to receive such an overwhelming response from the exhibitors and the trade visitors alike. The expo themed 'Automotive Technologies that Drive the World' truly reflected the potential of Indian Auto Component Industry. Spread across 60,000 square meters in seven halls and three hangars, the show witnessed participation from over 1,200 companies, which included 850 domestic and 350 international exhibitors. Further, over 115,000 dedicated trade visitors from 20 countries, contributed to making the event the largest OEM-focussed component expo of the world.

It is noteworthy that the exhibitors displayed next generation products compliant with the recent emissions, safety and environmental norms prescribed by the Government of India. Further, top leadership from most OEMs and IPOs showed active interest in the products and technologies displayed at the expo.

Besides that, the ACMA Safer Drives pavilion featuring virtual reality games and other special displays aimed at spreading awareness on road safety was a huge draw for the visitors.

To set the tone of the 14th Auto Expo- Components show, the 3rd New Delhi Automotive Summit 2018 on 'Making the Indian Auto Component Industry future ready' was organised on February 07, 2018. The Summit witnessed deliberations by national and international automotive experts on mobility technologies for the future. Other events and activities during the Expo which added to the vibrancy of the event included the 6th Regional Workshop Owners Meet of AIAWA (All India Automobile Workshops Association), Auto Waters 2018 - Driving Towards a Sustainable Future for the Auto Sector, Seminar on the opportunities for suppliers in xEVs, Weaving Synergy – Spot innovation Contest, and the Indo-German working group meeting.

We are pleased to bring to you a special edition of our Auto News dedicated to the huge success of the Auto Expo Components Show 2018. I hope you will enjoy reading the details about this grand event.

Vinnie Mehta

Director General, ACMA
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ACMA AUTONEWS

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VIEWS

Future of India Automotive Components Industry

N. K. Minda, President ACMA

Auto Expo 2018 saw a good response but at the industry level is there a firm ground and how do you see future growth?

We are satisfied as far as growth is concerned. In the two-wheeler segment, we have around 12-14 percent growth, in the four-wheeler segment we have 10-12 percent growth, and in the component industry we did US$43.5 billion turnover last year. This year we expect to do something around $47-49 billion. And in the aftermarket space we are at around $8.5 billion, while exports are at $11 billion, this is about the top-line.

As regards capacity utilisation, as the vehicle industry grows we will grow, we cannot grow alone. As far as exports are concerned, the aftermarket is increasing but in terms of OEM exports their capacity is also getting free. As there are new technologies coming, their capacity gets free, so therefore there is less opportunity there and they are reducing their prices of components.

At ACMA, we are making attempts on new ways to grow. One of our pillars is the business growth of our members; how to improve their growth with the OEMs' domestic and export operations. Within domestic, there are two sub-pillars — OEMs and aftermarket and in export two pillars — OEMs and aftermarket. We are conducting buyer-seller meets with OEMs. Earlier this year we did one with Maruti Suzuki, we will be doing one with Honda in June, and we will also conduct a big show on business growth with Tata Motors and Maruti Suzuki in Gujarat on May 18, 2018. All of their top management is going to participate and we are trying to get the chief minister and other secretariats to attend. We are expecting around 200 participants, especially for promoting Gujarat. This kind of business is the growth pillar of ACMA.

In terms of new megatrends like autonomous, electric vehicles and connected vehicles, what kind of preparation is Indian industry at?

People in the Indian component industry have started upgrading themselves, started visiting international motor shows like Frankfurt Motor Show and Paris Motor Show. They have started looking at what is happening in new technologies like hybrid, electric and other technologies, especially those pertaining to ICE-related space. Almost 50 percent of the component industry's contribution is from ICE drivetrain technology. Industry executives have started going to international shows to see what they could

add. These people are going to be impacted but this impact is neither going to be abrupt nor disruptive, but will happen step-by-step. Maybe the first step would be hybrid, then EVs but we will reach around 20-25 percent (penetration) according to industry experts. We ourselves do not know how much the penetration would be.

The answer to your question is that people are preparing themselves simultaneously. We do not have clear-cut RFQs from the OEMs as of now, but this is what we are expecting very soon.

In the ICE engine space, most Indian component makers except for a couple, are in the catch-up game, the western world is still advanced. But with the new megatrends, that gap will not be too much. Does that give the Indian component industry an opportunity to be at the global level or maybe in some aspects a global leader?

Yes, you are right. Right now, we have around 200 percent incentive on R&D expenditure. This is going to end by 2020. We are requesting the government of India to continue this incentive; if they continue it, then people will definitely spend their money on R&D and come up with low-cost solutions, thereby facilitating the consumer and also industry growth.

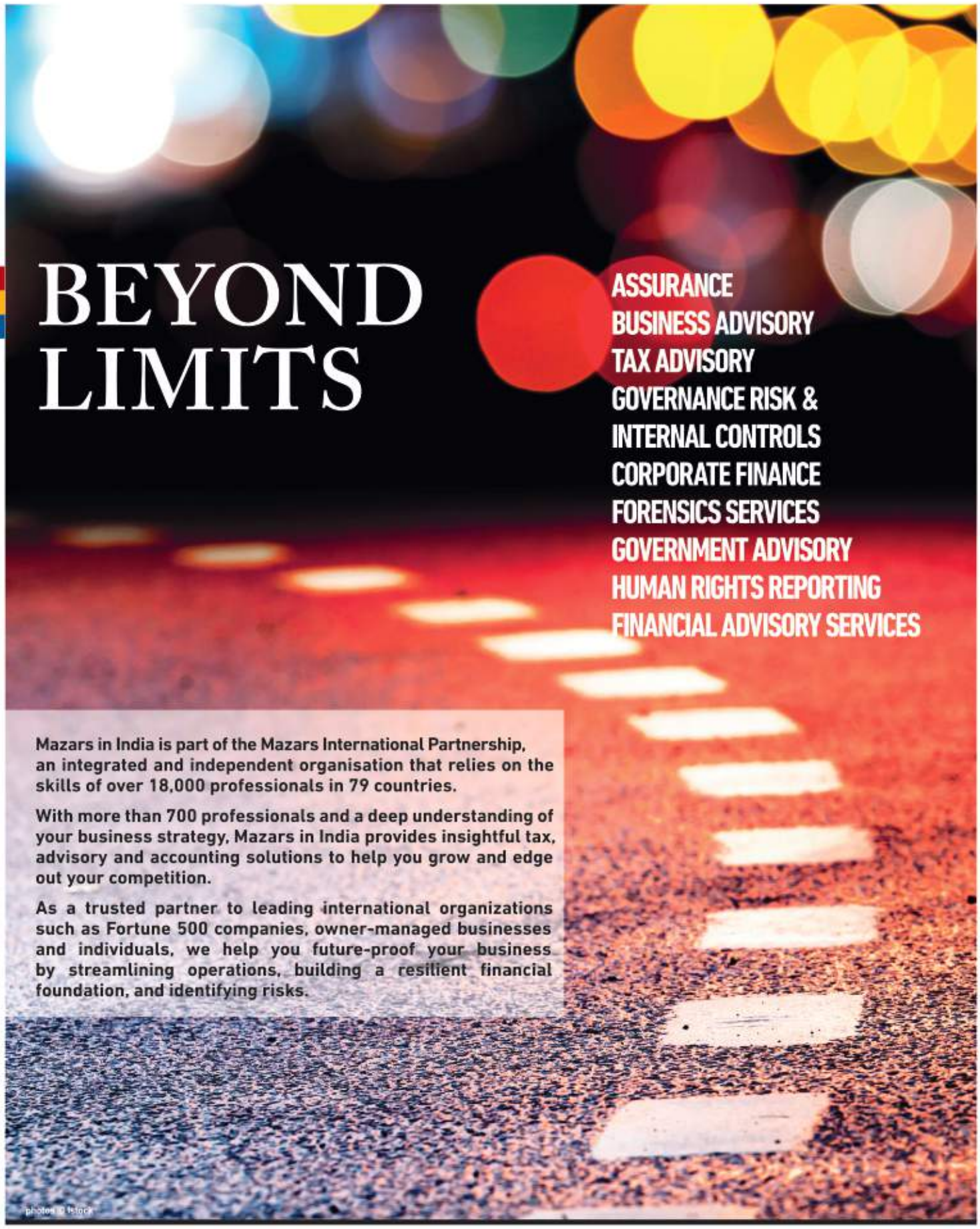
INTERNATIONAL EVENTS

Gearing up for India Autoparts Business Match Making Exposition, JAPAN

ACMA will be organizing an India Autoparts Business Match Making Exposition from 23 May to 25th May, 2018 in Japan. The Expo is being organized concurrent to the Automotive Engineering Exposition to showcase capabilities of Indian Suppliers 'Frugal engineering and manufacturing excellence.

Mr. Nirmal Minda, President, ACMA & Mr. Amit Mukherjee, Dy. Executive Director, ACMA traveled to Japan between 6 – 8 March, 2018 to meet all stakeholders and OEMs to request for their support. They had excellent meetings with the Indian Embassy in Tokyo, ACMA's MoU Partner JAPIA (Japan Auto Parts Industry Association), JETRO (Japan External Trade Organisation), JCCI (Japan Chamber of Commerce and Industry in India), Nissan, Grant Thornton, Daimler, Deloitte who have agreed their full support for the Expo.

Mr. Minda also met with Mr. Masayuki Oshita, Managing Director, Japan Auto Parts Industries Association to discuss about joint future initiatives between India and Japan.



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Coorporation Among Key Regions is Fundamental to Strengthen Global Competitiveness of the Automotive Supply Industry

Representatives of the 7 leading automotive suppliers associations from the major vehicle regions in the world (Brazil, Canada, Europe, India, Japan, Mexico and the USA), meet to discuss the importance of supporting a global automotive value chain and the reflect on the challenges facing the sector. The second 'G7' Global Automotive Suppliers Associations meeting was held last 12 and 13 March 2018 in Geneva, facilitating high-level discussions and coordination among the leaders of the major automotive supplier associations. This dialogue is seen as valuable and necessary in view of the highly global nature of the vehicle industry and the various challenges that can affect the fair and rules-based trade between regions as well as other issues impacting competitiveness and wealth creation across the globe.

The meeting participants exchanged views on the latest developments and mega-trends in the automotive and mobility sectors, such as issues related to:

- Decarbonisation of transport and energy
- Technology neutrality
- Current skills shortages and future employment needs
- Counterfeiting
- Industry competitiveness & new business models
- Connected and automated driving
- Big data, cyber security & In-vehicle-generated data
- Road safety
- Technical harmonisation
- Facilitation of global value chains & trade

The global automotive supplier associations believe that dialogue and information exchange will strengthen the cooperation between the different regions and support industry, national governments and international organisations, bringing benefits to society by implementing new mobility solutions.

The meeting was this year hosted by CLEPA – the European Association of Automotive Suppliers. Attending the meeting were representatives of ACMA - the Automotive Component Manufacturers Association of India, APMA - the Automotive Parts Manufacturers Association of Canada, INA – the National Auto Parts Industry Association of Mexico, JAPIA – the Japan Auto Parts Industries Association, MEMA – the Motor & Equipment Manufacturers Association of the U.S.A, SINDIPEÇAS - The National Association of Brazilian Auto Parts manufacturers and CLEPA – the European Association of Automotive Suppliers.

The automotive supply industry is an important contributor to innovation and economic growth around the world, sustaining highly-skilled employment and driving the development of new mobility solutions. The sector organises a highly-integrated worldwide network of suppliers and customers resulting in efficient international value chains. Materials, components and vehicles often cross multiple borders before they reach the customer.

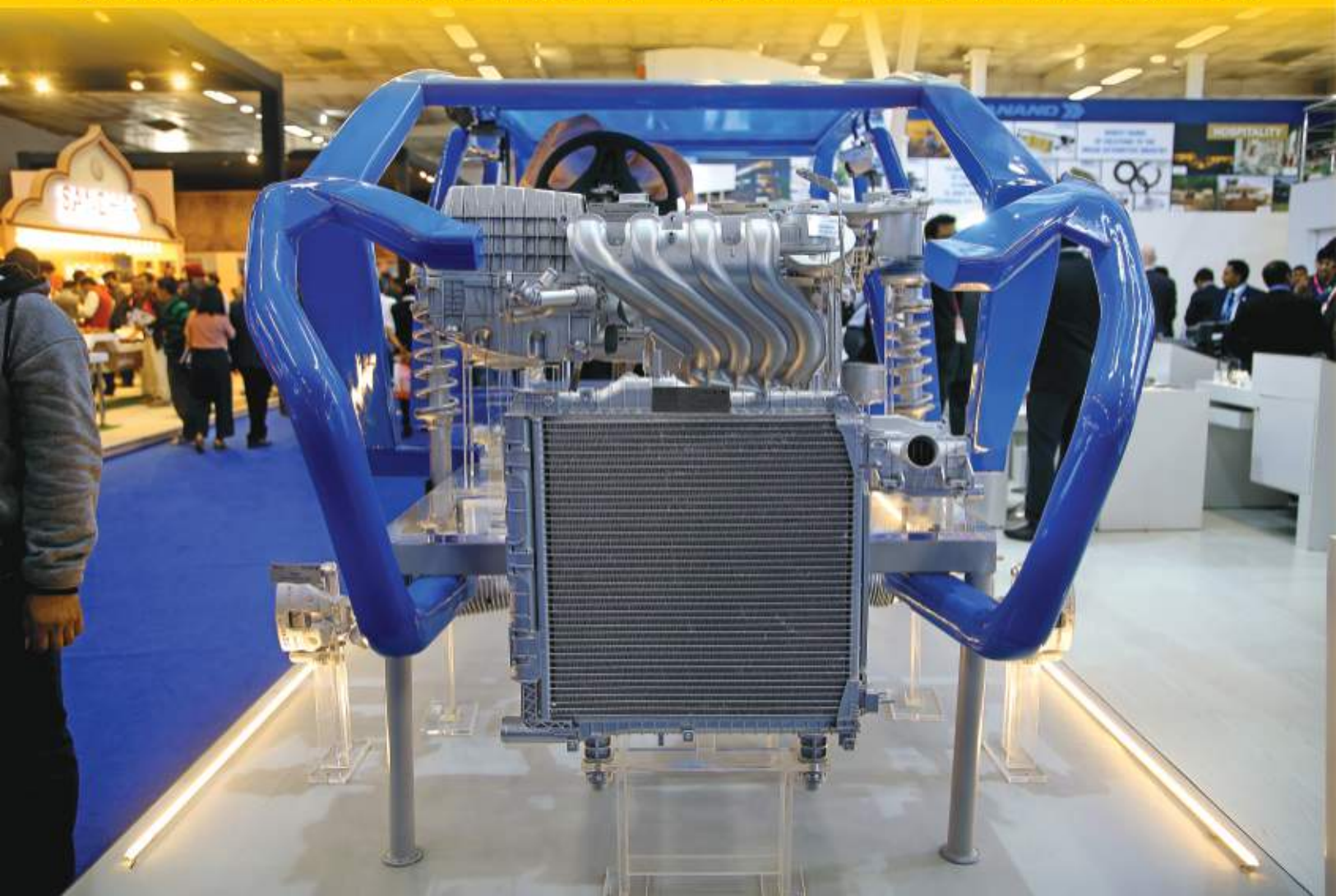
AUTO 2018 EXPO

SUPPLIERS TAKE ON THE INNOVATION CHALLENGE - BS VI AND ELECTRIFICATION

The Auto Expo Components Show, held from February 8-11 at New Delhi's Pragati Maidan, proved to be a veritable one-stop shop for all parts, big and small even as the industry grapples with new challenges in the form of BS VI, electric mobility and new upcoming safety norms. **Excerpts from Autocar Professional**

If there was a buzz in the capital city in the first fortnight of February, then it was about the Auto Expo – both the Motor Show and the Components Show. While the Motor Show held sway at the India Expo Mart in Greater Noida, the Components Show made all the news at Pragati Maidan from February 8-11, where over 1,200 exhibitors from 20 countries congregated to showcase their latest innovations, products and technologies, with a view to drawing new business enquiries, engage in networking and also prepare for new mobility challenges. And there are challenges aplenty for the Indian auto components sector, which in 2016-17 recorded a turnover of Rs 292,184 crore, contributed 2.3 percent to the country's GDP and four percent to exports, and accounted for Rs 56,096 crore of the domestic aftermarket.

It is numbers like these that makes the government recognise the strong connect of the component manufacturing industry to the overall Make in India programme. "The automobile and auto components industry in India is leading the manufacturing sector and is a major part of the 'Make in India' initiative. It not only leads the other industries in terms of size, but also creates jobs. The government of India will fully support the components industry to make eco-friendly e-vehicles," said Anant G Geete, Minister of



Anand G Geete:
"The government will fully support the components industry to make eco-friendly e-vehicles."

Suresh Prabhu:
"The Indian auto components industry needs to develop global standards and participate in Global Value Chains."

Nirmal Minda:
"A tech-neutral road-map, with well-defined roles and responsibilities and definite timelines is key to growth."

Abhay Firodia:
"It is heartening to see the Indian automotive component industry is all geared up to take the bull by the horn."

Shobana Kamineni:
"The sector is well positioned to benefit from globalisation and increase its exports exponentially."

Heavy Industries and Public Enterprises, government of India, at the inaugural session of the 14th Auto Expo 2018 Components Show organised by the Confederation of Indian Industry (CII), the Automotive Component Manufacturers Association (ACMA) and the Society of Indian Automobile Manufacturers (SIAM) on February 7. According to the minister, a major focus of the auto industry should be to develop environment-friendly vehicles and he committed his Ministry's support to make this happen.

Suresh Prabhu, Minister of Commerce and Industry, government of India, highlighted the need for the auto components industry to develop global standards and participate in Global Value Chains (GVCs). He stated that the industry is already a success story in terms of participating in global supply chains and is now ready to value-add and participate in GVCs. He stated that his Ministry is exploring the development of two auto clusters – one on the east coast and the other on the west coast. These would be created on a global scale with world-class facilities to help the automotive industry plug into the GVCs. He urged the auto components industry to step up its exports as this, in his view, would go a long way in boosting the growth of the sector.
Ms. Shobana Kamineni, president, CII, said that according to a recent CII study, five products in the automotive sector have the potential to be #1 or #2 in the world. These include passenger vehicles, two- and three-wheelers, heavy commercial vehicles, auto electricals and electronics, and automotive batteries. These have now been acknowledged by the government of India and included as a part of the 25 priority sectors for Make in India 2.0. She felt that the sector is well positioned to benefit from globalisation and increase its exports exponentially.

Complementing the Indian auto component industry, Abhay Firodia, president, SIAM, said, "Today, the Indian auto component industry contributes to more than half of the average exports of the automotive industry achieves. The Auto Expo – Components Show is one such platform where the exhibitors show their maturity and technology prowess to their potential customers in light of the disruptions which the industry is bound to face. It is heartening to see the Indian auto component industry is all geared up to take the bull by the horn."

Nirmal Minda, president, Automotive Component Manufacturers Association, said, "There are two major headwinds that the Indian automotive industry is gearing up for, one, preparing itself to transition from BS IV to BS VI and the other is embracing electric mobility. I hence urge our two ministers to ensure that a technology neutral road-map, with well-defined roles and responsibilities, and definite timelines, is made available to the industry so that we can transition well or else the disruption will sweep us away."

"We are also delighted that the Ministry of Commerce and Industry is shortly going to launch a new Industrial Policy while the Department of Heavy Industry is working towards a new Auto Policy. We hope both the policies are well integrated and complement each other," added Minda.

The industry though is facing new mobility challenges like upcoming BS VI emission norms, vehicle electrification and new safety norms too. Clearly, while embracing the advancements of electric mobility, the Indian automotive industry is also gearing up for the transition from BS IV to BS VI, all of which call for considerable investment, technology upgradation and training of manpower, among other issues.

In their attempt to stay relevant in the future, most of the exhibitors showcased products and services targeted at BS VI, electric vehicles and also safety. "We have a difficult yet interesting future ahead of us," said Jayant Davar, past president and chairman – Globalisation, ACMA and co-chairman and MD, Sandhar Technologies, while speaking at a seminar titled 'Auto Summit'.

Here's looking at some suppliers who participated in the country's premier components trade fair.

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- Rear Floor

Our Plant Locations : Mahad (Maharashtra), Jalisana (Gujarat), Greater Noida (Delhi NCR)

VARROC'S CONCEPT WITH ADVANCED LIGHTING TECH

Global component maker Varroc Group's theme for the Components Show was 'Excellence', which is reflected in its products and technologies. The key highlights included a concept car developed by Varroc Lighting Systems that showcased advanced exterior lighting technologies for four-wheelers, along with India's first adaptive bending beam head lamp and anti-glare adaptive high beam LED headlamp.

Apart from these, the pavilion was divided into four zones for scooters and mass-market motorcycles, commercial vehicles, passenger vehicles and high-end motorcycles.

The pavilion was inaugurated by Vipul Goel, Minister of Industries and Commerce, Environment and Industrial Training, government of Haryana. Goel said, "Haryana is the largest hub for the automobile industry in India. The state government is committed to promote the investment and employment opportunities in this field."
The Varroc Group has had a longstanding relationship with the state in the form of its polymer manufacturing unit in Binola near Manesar.

According to Tarang Jain, managing director, Varroc Group, "We are delighted to be present at the 14th Auto Expo. It has always been our home ground for displaying what we stand for and how we are evolving, and this year is no different. While we chose 'Excellence' as the theme for this year, it has set us apart from the competition all these years. This 'Excellence' reflects in all our global quality products on display, which have been our core strengths in our journey so far."

Verroc Lighting Systems' concept car showcased surface LED lighting tech;company pavilion was inaugurated by Vipul Goel, Minister of Industries and Commerce, Environment and Industrial Training, government of Haryana.

AVTEC'S FUTURE-READY ELECTRIC AND BS VI TECH

Avtec, part of the CK Birla Group and one of the largest independent manufacturers of powertrain and precision engineered products in India, had on show future-ready technologies including electric drive units and the Euro 6- compliant petrol and diesel engines.

Tubular Camshafts

Shaft for electric drivetrain

In a first, the company showcased an electric drive unit (EDU) designed and developed by its Switzerland-based subsidiary, Assag. Developed for a European pedelec e-bike customer, Avtec aims to showcase its capability to develop EDUs for two-wheeler applications. The EDU deploys face gear technology, which enables reduced noise and wear and tear of the machine. According to a

3-cyl, 1.2 litre Euro 6-compliant petrol engine

Avtec displayed an electric drive unit for the first time at the Components show

company official, the EDU is designed with unique gear geometry, and the gears are made of special plastic materials and alloys.

In yet another first, Avtec also displayed a locally designed and developed shaft for EVs. Tubular camshafts were showcased too. According to the company, these are about 25 percent lighter when compared to conventional units.

Avtec also showcased a Euro 6-compliant three-cylinder, 1.2-litre petrol engine and four-cylinder, 1.5-litre diesel engine.

BS VI TO GIVE NEW CHARGE TO RADIANT POLYMERS' BIZ

Delhi-Based Radiant Polymers is banking upon the new opportunities under the incoming BS VI regime. The company estimates a massive spurt in the demand for lightweight plastic parts such as throttle bodies, injectors, fuel pumps, fuel filters and carbon canisters among other components.

According to Nitin Bahl, CEO, Radiant Polymers, "We are developing many components that will see a spurt in demand with the implementation of BS VI emission norms. These include the throttle bodies, which enable the flow of air into the engine when you accelerate, injectors and fuel pumps. We are already manufacturing the fuel pumps for premium motorcycles, which currently deploy electronic fuel injection (EFI) technology. It will see mass implementation across all products, starting from 100cc vehicles."

"A fuel filter is necessary to ensure that the fuel that is supplied to the engine is clean. We are already manufacturing these fuel filters for passenger cars. We can also make the same for two-wheeler applications. These are all for the exhaust pipe emissions," he added.

The company is also looking forward to bank upon the incoming demand for carbon canisters, thanks to the evaporative norms. Radiant Polymers has been investing on expanding its production facilities. "We need to develop more tooling, invest in more machines and capacity expansion is a continuous process," Bahl added.

Nitin Bahl: "We are developing many components, including throttle bodies, injectors and fuel pumps, that will see a spurt in demand due to implementation of BS VI emission norms."

BORGWARNER GEARS UP FOR THE FUTURE

BorgWarner, the American transmission systems major, which has a strong global presence in more than 17 countries across the world, is now all geared up to offer solutions for the rapidly changing drivetrain requirements in a global scenario of fast adoption of newer mobility technologies.

The Tier 1 supplier, which closed FY2017 with US$ 9.07 billion in revenues, showcased its expansive range of contemporary products and technologies suitable to better the transmission efficiencies in internal combustion powertrains, as well as offered a host of hybrid and electric vehicle transmission solutions at the Components Show.
Greener combustion technologies: From an India perspective, looking at the upcoming immediate challenge for OEs to adhere to the stricter BS VI emission regulations by April 2020, BorgWarner displayed its advanced variable valve timing (VVT) systems as well as exhaust gas management systems

L-R: Sudhir Kumar Chawla, MD, BorgWarner Emissions India; Carlos Castano, VP-Engineering, BorgWarner Emissions & Thermal Systems; Jean-Francois Savajois, VP-Sales, BorgWarner Emissions Systems; G Murali, director & plant head, BW Emissions Systems India.

like high-efficiency EGR coolers and EGR valve motors for turbocharged diesel engines. While the technologies have been derived from their counterparts for Euro 6, the company is in the final stages of prototype testing and validation of these solutions in locally produced powertrains here in India.

Speaking to Autocar Professional on the sidelines of the trade fair, SK Chawla, managing director, BorgWarner Emission Systems India, said, "Getting prepared for BS VI is going to be our first step towards offering sustainable solutions for the coming future and we are going to bring in our slew of heat mitigation technologies for internal combustion engines to India."

"Our aim is to control the emissions as well as enhance engine efficiencies and we are bringing in all the capabilities needed to do that. While we are already geared to cater to the customer demands as they come in, our supplies depend upon customer readiness to install such technologies into their vehicles," added Chawla.

According to Davide Girelli, vice-president and general manager, BorgWarner Morse Systems Italy Sri, "We have been increasing our product performance targeting enhancing efficiencies of IC engines. We are already working with many OEs in Japan with our high-efficiency timing systems, cam-phasers and timing chains, which we are going to bring to India as well."

"We are investing substantially in bringing in the competencies to India in order to support the upcoming needs of the market as it gets closer towards cleaner emission regulations," Girelli added.

Hybrid and electric solutions: In the vehicle hybridisation space, the company displayed its vast product line-up, spanning from P0 to P5 hybrid architectures. While the 48V P0 system sees the alternator getting replaced with an integrated starter generator (ISG), the technology aids in recuperating brake energy and utilising it to power the e-booster to overcome the initial lag in a turbocharged engine. The benefits hint at about 18-20 percent increase in engine efficiency along with other vehicle lightweighting bonuses associated with engine downsizing.

According to Davide Girelli, "Our e-boosters are being tested in collaboration with major OEs in Europe, Japan and China, and we are slowly seeing progressive adoption of the technology. The technology aims to emerge as a cost effective solution for enhancing efficiencies of both petrol and diesel engines."

The company is also well placed when it comes to complete electrification systems and has developed a range of electric drive modules, EV transmissions and thermal management solutions for battery electrics. Back in 2015, BorgWarner had acquired Remy, a global major in rotating electrical components and the company is now fully prepared to offer a range of electrical motors for EV applications. Its 350V internal permanent magnet motor (PMM) on display is rated to churn out 130kW of peak

BORGWARNER EXPECTS EBOOSTER TECH TO EMERGE AS A COST EFFECTIVE SOLUTION FOR ENHANCING EFFICIENCIES OF BOTH PETROL AND DIESEL ENGINES.

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Do Not Miss!!

iAutoConnect is a one of its kind event which provides a platform for the Indian Component Industry to showcase its growing capabilities to the visiting international delegations (large aftermarket distributors/ dealers). It will be a unique opportunity for ACMA members to meet around top 150 Buyers from the following regions under one roof.

Key highlights of iAutoConnect 2018 will be:

- Around 175 new buyers from developed and emerging countries
- 6 sq. mtrs. fully furnished Booth at the iAutoConnect 2018 for component display and meetings
- Buyer Profile Directory
- Pre-fixed b-2-b meetings with visiting buyers

All interested companies participating at the iAutoConnect 2018 are requested to send across the duly filled in registration form.

- Company Participation fees Rs. 41,300/- (Including 18% GST. One delegate per company) *
- Additional Delegate fees: Rs. 11800/- (Including 18% GST per delegate - Maximum 2 delegates allowed per booth)*

* Participation will be on first-come-first serve' basis and fees once paid is non-refundable

For plant visits, members having plant in Pune to please confirm availability to receive visit of buyers on 26th October. Group visits will be organised as per buyers' interest.

For further information you may visit the website
www.iautoconnect-acma.in.
For any clarifications, please feel free to contact:

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Please make use of this opportunity and expand your business linkages through participation at iAutoConnect 2018

power after a two-stage reduction while spinning at 13,000rpm. The motor is suitable to be implemented in a wide variety of passenger vehicles from compact hatchbacks to mid-size SUVs, also having the option of multi-motor configuration.

BorgWarner's positive temperature coefficient (PTC)-based heaters come equipped with integrated electronics and are aimed to be offered as solutions for battery thermal management and cabin heating in an EV, while being lean on power consumption.

According to SK Chawla, "The Components Show is the first forum where we have showcased our technologies in the electric mobility space. Automobile manufacturers are looking towards bringing in EVs in India and we have a solution set ready to cater to their needs."

L-R: eBooster and integrated electric drive module

HI-TECH ROBOTICS' DRIVER ALERTNESS WARNING SYSTEM IN BHARATBENZ TRUCKS

Gurgaon-based Hi-Tech Robotics Systemz, a technology provider in the vehicle ADAS space, announced its new supply arrangement with Daimler India Commercial Vehicles (DICV). The company will be providing its driver fatigue alert system – Novus Aware – which will be installed as standard fitment on the heavy duty premium range of Bharat Benz products on offer in India.

A patented proprietary technology of Hi-Tech Robotics, the Novus Aware utilises artificial intelligence and computer vision to constantly monitor driver behaviour and raise warning signals to alert the driver in case of lack of attention due to dizziness, usage of mobile phone or looking away from the road for a considerable time. The system maps features like eyes, head and constant gaze to judge driver attentiveness. The technology has been indigenously developed and patented by the company as being a stepping stone to ADAS and to mitigate road accidents due to careless driver behaviour.

NOVUS AWARE UTILISES AI AND COMPUTER VISION TO CONSTANTLY MONITOR DRIVER BEHAVIOUR AND RAISE WARNING SIGNALS TO ALERT AN INATTENTIVE DRIVER

Speaking at the announcement, Anuj Kapuria, managing director and CEO, High-Tech Robotics Systemz, said, "Over 90 percent of road accidents are a result of human error and Novus Aware will help in significantly reducing that number. By providing our patented technology to Daimler in the form of the Novus Aware, we are supporting the company in its pursuit of providing safe trucks for Indian roads."

L-R: The Hi-Tech Robotic Systemz's Anuj Kapuria and Deep Kapuria; Erich Nesselhauf, MD and CEO, DICV and Pranav Kapuria, director, Hi-Tech Robotics Systemz, at the launch of Novus Aware ADAS/AV tech.

According to Erich Nesselhauf, managing director and CEO, DICV, "We are happy to partner with Hi-Tech Robotics Systemz for our new Driver State Monitoring System. Safety is a core attribute to BharatBenz and this innovative feature can help prevent accidents related to driver drowsiness or inattentiveness.

Apart from the company's HD range, the Driver State Monitoring System feature will also be available as an option for other products in the BharatBenz portfolio. Hi-Tech Robotics visions the system to also be introduced in PVs by 2019-2020.

ADVIK HI-TECH DEBUTS AT EXPO

Participating for the first time at the Auto Expo Components Show 2018, Pune-based Advik Hi-Tech, a leading global automotive component manufacturer, revealed a range of products from its existing portfolio that includes oil pumps, water pumps, tensioners, combined braking system (CBS), throttle body, secondary air injection / air secondary valves, purge valves, reed valves among others.

Aditya Bhartia, MD, Advik Group of Companies, said, "We are participating in the Auto Expo for the first time. The response that we got from day one has been overwhelming. When we meet the OEMs, Tier 1s and other visitors, I see a lot of value in the brand connect that we have built over the years. As India advances from BS-IV to BS-VI emission norms, necessitating a shift in engine technology, our products showcased here are well positioned to help our customers stay ahead in the changing market. We are a future-ready brand and these products underscore our commitment to developing best-in-class clean mobility solutions."

Talking about oil pumps and water pumps, he commented, "We now manufacture 1.5 million water pumps per annum for the two-wheeler industry. In India, two-wheelers do not use water pumps too often currently because the engines are air-cooled but we export a lot of that to the ASEAN markets. With BS VI coming in and the rise of bigger-displacement motorcycles in India will bring the demand for water pumps. So we are working aggressively on this product line and we have six water pumps on display here that we supply to the ASEAN markets."

On the oil pumps side, Advik makes 70 different models of oil pumps, including those for two-wheelers and four-wheelers.

For Advik Hi-Tech, just like for several other component suppliers, the implementation of BS VI emission norms from 2020 is a big opportunity. These stringent norms, which mandate replacement of carburetors with electronic fuel injection, will benefit the company with rapid rise in demand for the throttle body (used as a critical part in the EFI assembly unit).

"Advik has fully developed complete throttle body assembly and is geared up for the launch of BS VI emission norms," he said.
On the other hand, an incoming safety regulation mandates the installation of CBS on all new vehicles (below 125cc) from April 2018, which is also a big opportunity for this company. Advik claims it is the world's largest manufacturer of mechanical CBS (combined braking system). It has been manufacturing CBS since 2010 and more than 10 million CBS units made by Advik Hi-Tech are currently being used on the Indian roads. CBS prevents vehicle skidding during panic braking and improves a vehicle's stability and stopping distance.

Meanwhile, the company had locally developed secondary air injection (SAI) / air secondary valve (ASV). "It injects fresh air into the exhaust stream to allow for a fuller combustion of exhaust gases. Furthermore, BS IV regulation establishes the first-ever evaporative emission (EVAP) standards for two- and three-wheelers. Purge valve is the part of the vehicle evaporative emission control (EVAP) system. EVAP system prevents evaporation of the fuel vapours in the fuel tank. Petrol fumes, which are generated in the fuel tank, get stored in a canister. A purge valve controls the flow of this absorbed fuel fumes from canister to the engine from intake manifold," he explained.

Aditya Bhartia: "The response that we got at the Components Show has been overwhelming."

Advik's top boss estimates the company's India business turnover to be around Rs 400 crore. "In FY2017-18, we had planned to invest about Rs 50 crore and we are in line with our plans, which are based on our product pipeline for the near future. This should result into 25 percent CAGR growth for the next three years," he disclosed.

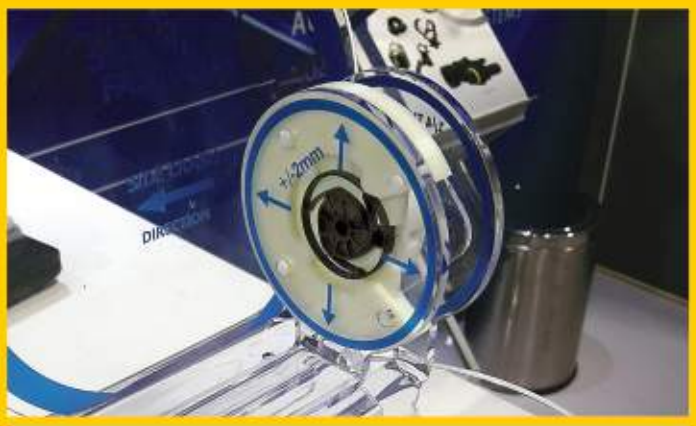
ARAYMOND FASTNERS INDIA FOCUSES ON ASSEMBLY SOLUTIONS

French supplier of non-threaded fasteners and quick connectors, ARaymond Fasteners displayed some of its latest connecting solutions suitable for the upcoming BS VI emission norms.

Manish Padharia, managing director, ARaymond Fasteners India, said: "The 2018 Auto Expo Components Show has been very busy for us. I can clearly see that the customers are now more focused on the BS VI emission norms and they are looking for cost effective solutions for the same. They are also looking for solutions around electro mobility."

Kapil Rai, General Manager (Sales & Marketing) and Manish Padharia, Managing Director, ARaymond Fasteners India.

BS VI emission norms demand necessary measures for the OEMs to aggressively work on the front of quality and reliability of components including reducing weight of parts across the entire vehicle structure.



Side crash fastener a prominent safety ARaymond product.

"Along with that, the incoming safety norms and the market demand for connectivity solutions is driving the need for compact and lightweight solutions. So it's not only about the connectors, it is about integration of products thereby offering smart assembly solutions," adds Padharia, who claims to have had very busy days at the 2018 Auto Expo Components Show at Pragati Maidan.

The top company official said that ARaymond Fasteners India is

focusing on providing complete assembly solutions in the wake of the incoming demand on the back of BS VI emission norms and electric mobility.

"We want to integrate a number of parts, we want to ensure that we provide them solutions for light materials, which may be made of new advanced composites. Our priority is to help them with the new incoming norms. We are not here to sell a product, we are here to sell what our customers require. To do so, sometimes we discard our own existing solution while we develop new. This is inherent DNA of Araymond," he underlines.

The managing director of ARaymond Fasteners India calls lightweighting his company's key subject. "Developing lightweight solutions is our core strength. We strive to provide our customers the right assembly solutions based on their needs, based on serviceability and based on the warranty," he says.

The company, which will undoubtedly see a spurt in its business under the implementation of the BS VI regime, expects good growth in the near future. While it is preparing to stay aligned with its order book, it is also focusing on the value per part it offers to its customers.

"This approach is delivering higher growth than the market average," Padharia quips. According to him, ARaymond Fasteners India's FY2016-17 business stood at about Rs 220 crore. It is targeting to breach the Rs 300 crore turnover by the end of the ongoing fiscal.

Among many products, ARaymond displayed side crash fasteners, which come under its safety portfolio. In case of side or frontal impact, the trims (attached on the car's body) must not detach and hit the passenger(s). The company's side crash fasteners offer safety by ensuring that in the event of an accident, the trims remain attached.

JAMNA AUTO FOCUSES ON LIGHTWEIGHTS SUSPENSION SYSTEMS

Jamna Auto, a major component manufacturer of commercial vehicle suspension systems, focused on lightweight solutions and displayed a composite spring for LCVs and hybrid spring for heavy commercial vehicles. The upcoming BS VI emission norms are going to put a lot of pressure on suppliers to reduce vehicle weight.

Given the tighter emission norms, lightweighting of trucks is gaining ground. Composite springs are already being used in a few truck platforms in Europe and USA for over a decade now. While composite springs are more expensive than conventional springs, they are highly durable.

"Keeping the stricter emission norms in mind, we have started developing a composite spring for LCVs which is 50 percent lighter than parabolic springs and 70 percent lighter than conventional springs. We have also developed a hybrid spring, which is a combination of steel and composite for HCVs, offering lightweight benefits and higher durability," said Sunil Laroiya, vice-president, R&D, and International Business.

Over the past few years, the heavy commercial vehicle segment has been rapidly moving to higher tonnage starting from 25T to 31T, and 37T with 10T axle will move to 40T and above. To address this growing trend, the company has developed a new 10T lift axle against the current highest axle of 6T. "Given that higher-tonnage trucks are being preferred in the industry, we have developed a 10-tonne lift axle; this will push up truck payload up to 41T. We are working with local commercial vehicle OEMs to launch this axle commercially in in next 3-5 months," added Laroiya.

Besides this, the company has also developed a rubber bogie suspension. Currently, all bogie suspensions in India are on leaf springs with a lot of part replacement and maintenance cost involved. Keeping this in mind, Jamna Auto has developed the rubber bogie suspension which offers 4-5 times' higher life as compared to regular mechanical suspension.

The trailer market in India is highly unorganised but with recent legislation, every trailer supplier has to be certified by ARAI. This

Jamna Auto displayed a composite spring for LCVs which is 50 percent lighter than parabolic springs and 70 percent lighter than conventional springs, and a hybrid spring, which is a combination of steel and composite for HCVs.

JAMNA AUTO IS AGGRESIVELY EXPANDING CAPACITY TO BECOME THE LARGEST PARABOLIC SPRING MANUFACTURER IN THE WORLD.

move will help regulate the industry much better, becoming more organised.

"We have launched our trailer suspension which is in parabolic spring that reduces suspension weight by about 200kg, helping the truck owner with a higher payload. We are also offering a one-lift axle feature which will help the trailer; when empty, this axle can be lifted. The company is quite bullish on this segment as higher-tonnage trucks and the growing trailer market are likely to boost demand," said Loraiya.

The currently buoyant growth in the domestic commercial vehicles market is driving Jamna Auto's growth with higher production resulting in production capacities. The company is operating at almost 90 percent of its production capacities across plants. Jamna Auto opened a new plant in Hosur last year; this unit has seen a pick-up in production. The company is also increasing its parabolic spring capacity to become the largest parabolic spring manufacturer in the world. "As of today, we are No. 2 in total parabolic spring capacities. In the next few years, we are likely to be the No. 1," signed off Loraiya.

BYBRE INTRODUCES NEW RANGE OF CBS FOR 2W INDUSTRY

Bybre, part of the Brembo Group, which started operations in India eight years ago to address the needs of the domestic two-wheeler industry, is betting big on the upcoming safety norms that will see combined braking systems (CBS) for the motorcycle segment.

The company said the Auto Expo is a good event to showcase new solutions and technology to not only OEMs but also to the end consumer who plays a key role in influencing the manufacturing decision for OEMs.

Bybre displayed the combi braking system for motorcyles – CBS Actuator and a two-circuit caliper. Sudhir Nirantar, executive director and CEO, said: "If consumers see the benefit of CBS, they will start demanding/expecting the same from OEMs. As a result, the safety improvement in the motorcycle segment will further improve."

Nirantar said it took 15 years for disc brakes to reach the penetration of 35 percent in the motorcycle segment in India; similar headroom is available for the application of disc-brakes in the scooter segment.

Bybre displayed the combi braking system for motorcycles- CBS Acuator and a two-circuit caliper.

ATE ELGI'S SMARTWASH ATTRACTS MANY DISTRIBUTORS

SmartWash, with its multi-facted systems, is equipped to deliver a spotless and glossy car in a little over five minutes.

ATS Elgi, which has one of the widest ranges of garage equipment in India, had live demonstrations of its SmartWash automatic car wash system, which drew a considerable audience comprising both distributors and visitors. This machine, which offers better technical efficiency and longevity, is targeted at garages and vehicle service providers.

SmartWash is equipped to deliver a spotless and glossy car in a little more than five minutes. ATS Elgi says the machine is suitable for any garage which is in need of quick automation to streamline its washing process. The key feature includes wash systems with soft brushes, shampoo and waxing and simultaneous under-chassis wash.

Besides this, it also exhibited new technologies in vehicle servicing equipment – automatic car washer, vehicle test lane, and panel repair systems. While the indoor stall was primarily dedicated to body shop and vehicle diagnostic products – plastic repair system and vehicle test lane – the outdoor stall displayed washing equipment, which included automatic car washer, under-chassis washer, 360-degree washing boom and car washing pump among others.

FREUDENBERG BETS BIG ON INDIA

The Freudenberg Group was present at the Components Show through its four business verticals – Sigma Freudenberg NOK (sealing solutions), Corteco (components for independent automotive aftermarket), Kluber Lubrication and OKS.

New mobility concepts pose major challenges to vehicle manufacturers and suppliers, who need to prepare electric mobility for mass production. The Freudenberg Group, which is a global automotive supplier, says it is examining the trend closely and working to create innovative solutions.

"We want to remain a competent supplier of high-tech innovation – for all drivetrain types. The innovations will include improvements to current internal combustion engines, hybrid engines or fuel cells along with those to purely electric vehicles. Thanks to our technological and material expertise, we will remain an important partner for many OEMs. Just look at battery technology or fuel cell products for example. Our non-wovens and filters are highly relevant to these markets. The markets for our sealing technology products are going to change, while they remain highly relevant. Our job is to advance the technologies we have, find new ideas and move forward with our customers," said Georg Graf, Regional Representative, Freudenberg Regional Corporate Center India.

At the Auto Expo, the German major displayed its range of specialty lubricants from OKS and Kluber Lubrication, its sealing solutions from Sigma Freudenberg NOK and aftermarket solutions from Corteco.

The company's non-woven materials, which find use in the interior rooftop of vehicles, now are used in the battery management system for EVs. According to Milind G Karkhanis, Head – Technical Non

The Freudenberg Group was at the Expo through its four business verticals - Sigma Freudenberg NOK, Corteco, Kluber Lubrication and OKS.

STANADYNE DEBUTS INNOVATIVE, LOW-COST DIESEL, PETROL FUEL SYSTEMS

Stanadyne, a global fuel injection systems developer, headquartered in Windsor, Connecticut, debuted two new fuel systems that offer a differentiated approach for small engines to meet BS VI emission standards.

Sanjay Chadda, MD, Stanadyne Near East, and Stanadyne President, Chief technology officer Dr John Pinson.

The Gasoline Pumping Injector (GPI) and Solenoid Controlled Unit Pump (SCUP) have been developed as cost-effective replacements for mechanical systems in two- and three-wheeler applications, and enable OEMs to meet India's new emission norms.

The GPI is an integrated pump and injector that fits in the footprint of the mechanical carburetors commonly used on small petrol engines today. The SCUP is an electronically controlled unit pump that offers precise timing and fuel delivery control and is an alternative to diesel common rail technology.

"GPI and SCUP technology was developed for the Indian market to offer the country's manufacturers a way to seamlessly transition engines into an era of cleaner power and energy," said Sanjay Chadda, managing director for Stanadyne Near East. "Aside from addressing India's upcoming emissions requirements, the GPI has the capability to serve the global market as well."

With manufacturers working to meet 2019/2020 emissions requirements of small diesel and petrol engines, Stanadyne's GPI and SCUP offer alternative low-cost solutions that require fewer engine modifications compared to more complex systems like port fuel injection and diesel common-rail.

"This technology (GPI and SCUP) is designed to fit in the footprint of today's mechanical systems, which gives them a direct advantage over the other options in the market, which would require manufacturers to make major design changes to their engines," said Jayabalan S, senior general manager of Application Engineering.

Showcased along with GPI and SCUP were Stanadyne's other diesel and gasoline fuel systems – Gasoline Direct Injection (GDI) pumps and Diesel Common Rail (DCR) systems – which marked these products' inaugural exhibition in India.

Stanadyne's GDI tech is designed primarily for three-cylinder and above passenger-vehicle engines and is among the world's fastest-growing fuel systems to improve petrol fuel economy. Stanadyne developed the world's first 200 bar GDI pump for the automotive market in 2006.

"With manufacturing facilities strategically placed across the globe, Stanadyne is committed to enabling the next generation of clean and fuel-efficient engines," said Stanadyne president, chief technology officer, Dr John Pinson. "Solving the unique regional challenges faced by our customers with tailor-made products is part of our company philosophy – the technology in our GPI and SCUP products is an ideal example of this."

HITACHI AUTOMOTIVE SYSTEMS BRINGS TOKICO SUSPENSION PRODUCTS TO INDIA

Hitachi Automotive Systems, the wholly owned subsidiary of the 9,162 billion yen Hitachi Group, headquartered in Japan, aims to expand its footprint in the aftermarket space in India.

The company, which already offers a host of products in the Indian aftermarket, including glow plugs, ignition coil sensors, relays and fuel pumps, has now introduced a new range of suspension components under its Tokico brand.

Tokico is a rather renowned name in the US, Europe, Japan and other Asian markets, where it enjoys a premium positioning, competing against the likes of KYB and Showa in the area of braking and suspension parts. The brand has a sizeable 24 percent share in the aftermarket space in Thailand, where it is also a leader in catering to the huge demand from the pick-up segment of the local market.

Speaking to Autocar Professional on the sidelines of the Auto Expo in New Delhi, Bradley J Maggart, president, Hitachi Automotive Systems Asia, and executive officer, Hitachi Automotive Systems, said, "The thought behind introducing Tokico in India came from the fact that there is already a huge demand and liking for these products in the aftermarket, where customers are seen importing the parts themselves. So, we decided to officially introduce the range of products here in India."

"India has seven major suspension components players in the country, and now since the brand is here, we have a fair opportunity of exploring the market in the coming future," he added.

Hitachi Automotive Systems, which has suspension components plants in Mexico, China and Thailand, will initially be importing the Tokico products from Thailand, to be sold in India.

The company, which had introduced its range of variable valve

Bradley J Maggart: "Since customers in India are importing Tokico parts themselves, we decided to officially introduces the range of products in India."

timing controls and plug-top coils (PTCs) for OE supplies in 2015, also setting up a new manufacturing line at its Chennai plant, is now seeing unprecedented change in the automotive sector in the country, which is being fuelled by growing aspirations of the middle class.

"Our basic strategy has been that of locally producing for local consumption in the market, also aligning with the government's Make in India programme. With rising vehicle volumes, we have invested in our second PTC line at our Chennai facility and we intend to fully utilise the entire installed capacity by 2020," said Maggart.

Hitachi Automotive Systems, which has been present in the country since 2004 through Hueco, in an attempt to scale up its aftermarket business, completely acquired Hueco in early 2012. The company is looking to utilise its existing warehouse and distribution network in the country to form firm impressions for Tokico products.

New technical support centre: The company also announced the establishment of a new technical support centre in Delhi, in order to expand its presence in North India and to also enhance the level of technical aid to its customers in the country. While the work is underway, the facility would get operational with eight people by the end of FY2018. Going forward, the technical centre will also help in supplier development in the future as the company enhances its localisation levels and increases its local and export supplies.

Two new products in the next two years: According to Maggart, "We continue to invest in the Indian market and are carefully evaluating the launch of at least two new products in the near future between 2018 and 2020. Hitachi Automotive Systems is investing in solutions that contribute to the Indian society. At the Delhi Auto Expo, we have displayed the latest technology in electrification and autonomous driving, along with a range of engine technologies that help reduce vehicle pollution in order to comply with BS VI norms in the next two years."

While PTCs aim to increase efficiency as well as reduce emissions in IC-engined vehicles, the company displayed its electric motors, inverters and Li-ion batteries in the vehicle electrification space. Its drive control systems division also showcased its range of electrically driven intelligent brakes and semi active suspension systems.

With its in-car entertainment subsidiary, Clarion, Hitachi Automotive Systems is also prepared to offer connected solutions for the future, including telematics and IoT platform products with a vision to support smart city projects globally. In India, the company is collaborating with the government to lend technical support in its Smart City project.

The automotive systems business contributes roughly 10 percent to the entire global business of the highly diversified Hitachi Group and the company looks at the aftermarket as a key pillar to accelerate its future growth in India.

"India holds an extremely important position in our future growth strategy and 50 percent of all our slated future regional investments in FY2019 are going to be infused in India," Maggart concluded.

Though final visitor numbers to Components Show 2018 have yet to be released, it can be surmised this was a hugely successful event. Given the global marketplace that it was, the over 1,200 exhibitors were seen to be actively networking, checking out other products and technologies and making notes to take on future challenges. The dates for the next Components Show have been announced: February 6-9, 2020.

'FIFTY PERCENT OF ALL OUT SLATED FUTURE REGIONAL INVESTMENTS IN Fy2019 ARE GOING TO BE INFUSED IN INDIA.'

SUPPLIERS DO THEIR BIT AND MORE FOR SAFER DRIVE

India leads the world in road crash deaths and injuries. In 2016, there were 1,317 accidents and 413 deaths on Indian roads each day — the country witnessed reports of 480,652 road accidents that injured 494,624 individuals and claimed 150,785 lives. However, in spite of road accidents taking such a disturbingly high toll of precious human life, there continues to be deep apathy towards road accident victims and indifference towards road safety rules. In a bid to make Indian roads safer and sensitise the public towards their responsibilities on road, ACMA had, some years ago, started the 'Safer Drives' initiative in a bid to disseminate information about road safety and also encourage the use of genuine auto parts by motorists and inculcate good driving habits.

The safety initiative reached newer heights with its latest iteration at the Safer Drives Pavilion at the Components Expo, where a cluster of partnering companies showcased innovative efforts in an attempt to enhance vehicle and pedestrian safety on the Indian roads.

VIRTUAL REALITY CHECK

The action in the booth began with educating the general public through two virtual reality-enabled games, aimed at spreading awareness about good driving habits and also visually mapping a driver's attentiveness on the road by 'throwing' multiple distractions. There was also a driver training simulator set up by the Automotive Skills Development Council (ASDC), which is actively pushing the installation of such systems in technical training institutions across the country.

Hella India's Ramashankar Pandey: "We aim to spread awareness by making people better informed of their alertness levels while driving, and by stressing upon the benefits of using superior quality components."

THE VR-ENABLED GAMES VISUALLY MAPPED A DRIVER'S ATTENTIVENESS BY 'THROWING' MULTIPLE DISTRACTIONS.

The ACMA Safer Drives pavilion was also an extension of the safety focus of various major component suppliers, where Hella, for instance, displayed its vast range of improved lighting technologies like Matrix headlamps, long-life signalling lamps for trucks, high-power fog lamps and high-quality wiper blades on display for the aftermarket. Also, German Tier 1 major Continental displayed its OE range of speed sensors, cameras, radars and ultrasound sensors to gauge the distance between vehicles and activate active braking systems like automatic emergency braking to prevent accidents.

Harita Seating Systems, the seating solutions provider to the commercial vehicle industry and part of the TVS Group, gave a glimpse of its innovative solution of integrating a visual, audio and tactile feedback mechanism into a commercial bus or truck driver's seat, to keep the alertness levels in check. The system directly notifies the fleet owner if a driver is showing signs of drowsiness. The Intelli-Seat comes at a premium of Rs 12,000 over a regular one and is seeing good traction with OEs, as well as with a lot of coachbuilders. Among other suppliers in the pavilion were UNO Minda Group, Elofic Industries, Brakes India, AG Industries, Dynamic and Holoflex.

KEEPING FAKE AT BAY

ACMA's initiative also takes into account the big menace of counterfeit and substandard components afloat in big numbers in the aftermarket. The campaign spreads consumer awareness by asking the general public and mechanics to look out for 3D holograms on part- packaging to differentiate between a high-quality genuine part and its low-grade, unsafe variety.

According to Ramashankar Pandey, managing director, Hella India, "As the automobile industry as a whole, we needed to be responsible towards tackling the dreadful scenario of increasing road accidents in India and bringing in actions on the ground. ACMA took this activity very proactively and having historically witnessed positive reactions towards public debate campaigns in the past, the Safer Drives initiative was born to holistically manage the entire ecosystem of issues related to road safety. We are targeting to spread mass public awareness by making people better informed of their alertness levels while driving, and by stressing upon the benefits of using superior quality parts at vehicle servicing time. Also, at an industry level, remains a host of driver assist technologies aimed at significantly improving vehicle stability and driver control on road."

Hella India's Virtual Reality simulator judges user's alertness level while driving on a scale of 0 to 500. VR 'game' also prompts user to adopt good driving habits.

A visitor to the Safer Drives Pavilion tries his hand at the driving simulator installed by the Automotive Skills Development Council, which is targeting similar fitment in driving schools.

Proper vehicle lighting, which increases visibility, is a vital contributor to staying safe on the road.

AG Industries, Elofic, UNO Minda Group, Dynamic and Holoflex were also part of collaborative supplier to enhance road safety awareness among visitors to the Components Show 2018.

Continental's display of cameras, radars, ABS and airbad modules. The firm has a Zero Fatalities, Zero Injuries, Zero Accidents roadmap.

Harita Seating Systems' innovative solutions. Intelli-Seat (right) and three-point seatbelt harness for buses.

Elofic Industries' display stresses upon use of genuine, high-quality fuel line parts like fuel and oil filters for optimum vehicle performance. Industry continues to battle menace of fake parts.

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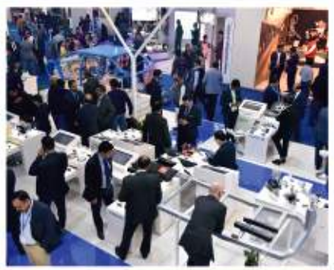

NATIONAL COMMITTEES

3rd NEW DELHI AUTOMOTIVE SUMMIT

GLOBLISATION COMMITTEE

The New Delhi Automotive Summit 2018 was organised by Automotive Component Manufacturers Association of India (ACMA) themed 'Making the Indian Auto Component Industry Future Ready on 7th February 2018. The conference was aimed at deliberating on how the Indian auto component industry can gear up for a fundamental shift - to move away from traditional ICE based platforms to cleaner Electric and Autonomous Vehicles.

The ACMA Summit saw Automotive Experts from across the world sharing their perspective on the emerging technology trends and changing market dynamics. The Summit also saw release of the White Paper on 'Making Indian Auto Component Industry Future Ready' prepared by Grant Thornton – Knoweldge partner of the Summit.

During the Summit, the Session on 'Auto Industry Disruption' saw speakers from Fourin Japan providing future trends of the Auto Industry including 2 Wheeler, LMC UK's perspective on Auto Industry disruption and its impact, AutoCare, USA's perspective on Telematics & Digitization and perspective from IHS on Impact of powertrain in Euro VI and EV. The session on 'Managing Transition' witnessed speakers from our counterparts MEMA (US), VDA (Germany), FIEV (France) and Automobility (China) explaining what the Indian Industry can learn from their experiences.

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- Oman is within 4 hours of South Asia,
- 5 hours flight of Africa & 6 hours flight of Europe

ROAD

- Direct highway access to GCC markets

RAIL

- Railway to GCC under consideration

المنطقة الحرة بصلالة
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Contact: **Ms. TRIPTI PARSANI,** SFZ Country Manager - India
Mobile: +91 86 55 11 66 55 | Email: tripti@sfzco.com

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The above session was followed by a panel discussion on 'Making the Indian Auto component Industry Future Ready' with luminaries from international and domestic automotive industry and the Government joining as panelists.

The 3rd New Delhi Automotive Summit 2018, with its very impressive line-up of speakers and panelists from the industry and the Government witnessed deliberations on some of the most pertinent challenges being faced by the automotive industry and what the players should be doing to stay relevant in the changing times.

The summit garnered positive feedback from members and also provided an opportunity to network with all the leading IPOs.

Coinciding with the 3rd New Delhi Automotive Summit 2018, the 2nd Globalisation Committee meeting was also held, which was chaired by Mr. Jayant Davar, Chairman - Globalisation Committee & Past President, ACMA. In this meeting various aspects of International Engagements, activities, and Strategies were discussed for the committee as a way forward.

Mr. Rahul Kapur from Grant Thornton presented the preview of the study of framing 3 year strategic roadmap for the Indian Auto component Industry for Globalisation, where he presented the projected deliverables that would be derived from it.

Further Mr. Bevin Jacob from "Automobility", presented the Strategy for Indian Suppliers to engage with Automobility ecosystem in context to Chinese Auto Industry. The Globalisation committee Members in the end interacted with IPO members at the IPO forum meeting.

HALF DAY WORKSHOP ON TALENT RETENTION

MSME Committee

ACMA MSME Committee organized a half day workshop on Talent Retention on February 15, 2018 at ACMA Office, New Delhi. Mr. Rajneesh Singh, Managing Partner of SimplyHR firm was the faculty for the workshop.

Mr. J S Rangar, Chairman of ACMA - MSME Committee gave a warm welcome to all the participants at the workshop. He said that HR practices are considered unresponsive, time consuming and involves non-priority task by the MSMEs. However, to enhance overall performance, MSMEs need to enhance competitiveness via better human resource management practices of recruitment, selection, training, compensation and retention.

The main objective of the workshop was:

- To understand the growing challenges around Talent Management
- To brainstorm ideas and real life case situation for improving Talent Attraction, Engagement & Retention
- Evolve Solutions in small groups & sharing of Industry best practices around talent retention

The workshop revolved around 4 pillars of Talent Retention i.e., Compensating, Onboarding, Managing Performance and Engaging. The participants brainstormed on the retention challenges and the interventions to be taken for managing retention. Mr. Rajneesh Singh highlighted how critical this topic was in the context of growing competition and how it is one of the most important ingredient towards creating a great place to work. The role of both the leadership and HR team members towards this will be the key differentiator.

24 delegates participated at the workshop and the feedback received from members was very encouraging.

ACMA AND SIAM URGE SUPPLIER SUSTAINABILITY, ISSUE CALL FOR EVOLUTION

Excerpts from Autocar Professional

Electric Mobility Committee

Intro: With the transition from internal combustion engines to electric technology set to drastically cut down the number and types of components required to assemble vehicles, the supplier fraternity is brainstorming sustainability and the need to stay relevant. Indian auto industry stakeholders recently met in Pune to discuss and debate the path ahead. Covered by Autocar Professional.

The advancement of electric mobility and its impact on the automotive industry, particularly vehicle and component manufacturers and others involved in the overall automotive value chain and their sustainability in the future, is reverberating throughout the world. It is no different in India and industry stakeholders are exploring, debating and brainstorming the path ahead to stay relevant in the future.

In an effort to discuss and debate the roadmap for electric mobility in India, apex industry bodies ACMA and SIAM had organised a national conference and technology display in Pune on March 6, 2018. The seminar, supported by global consultancy Roland Berger with its recent findings on the mass adoption of EVs (in India) in the foreseeable future, was on the theme of 'Stakeholders Consultation for Roadmap on Electric Mobility in India.'

Nishant Arya, executive director, JBM Group and also the co-

chairman for electric mobility committee at ACMA; Dr AK Jindal, VP, Tata Motors (representing SIAM); Jeffry Jacob, partner, Roland Berger; Piyush Munot, director, KCTR Varsha Automotive and co-chairman, ACMA (Western Region); May Arthapan, Asia Pacific director, LMC Automotive; Naoyuki Furukawa, division group head – car electronics division group, Shindengen Electric Manufacturing Company; Chinmay Pandit, AVP & head – Alternate Powertrain Technologies (Revolo) at KPIT; Umesh Shah, COO, commercial vehicle & railways business unit, Gabriel India; Anand Deshpande, deputy director & head, Automotive Electronics Department, ARAI and other senior industry delegates were part of the conference as speakers as well as panelists.

ACTIVE GOVERNMENT ROLE VITAL FOR INDIAN INDUSTRY TO BE EV-READY

Anil Srivastava, director general, DMEO and advisor (infrastructure connectivity), NITI Aayog, was the chief guest, present in the first session via video conferencing from Delhi. Representing the government think-tank, Srivastava assured the delegates that the government is working on appropriate guidelines to promote EV adoption by generating the initial demand (EESL tenders under different phases) and the necessary EV charging infrastructure.

Several companies involved in the power and energy sector are open to take up the government's vision of setting up the EV charging infrastructure across India. It can be recalled that ABB India, part of the US$ 34 billion global major ABB Group, has expressed its keenness to participate in the same. In a recent conversation with Autocar Professional, Sanjeev Sharma, MD, ABB India, had said, "We are keen to play a prominent role in setting up the EV charging infrastructure on a large scale in India in the future. ABB has more than 6,000 units installed across more than 55 countries." The company has recently installed a fast charging station for EVs at the NITI Aayog office in New Delhi.

INSIGHTS FROM THE ROLAND BERGER STUDY FOR INDIA

Roland Berger, in association with ACMA and SIAM, has recently released its research report – 'Study on xEV Market and Opportunities for xEV Component Manufacturers' – that forecasts EV adoption in India.The study details that strong growth of pure EVs (across the two-wheeler, three-wheeler, passenger car and bus segments) can be expected by 2025, until when China will continue to retain global leadership in EVs. The study identifies four possible EV scenarios in India based on the total cost of ownership (TCO) and the support from the government (fiscal incentives under FAME scheme). These four possibilities are – rapid transition (most optimistic and ideal scenario), regulatory push (customers compelled to purchase EVs), market pull (demand from customers due to favorable TCOs) and the business as usual (unfavorable TCOs and lack of government support).

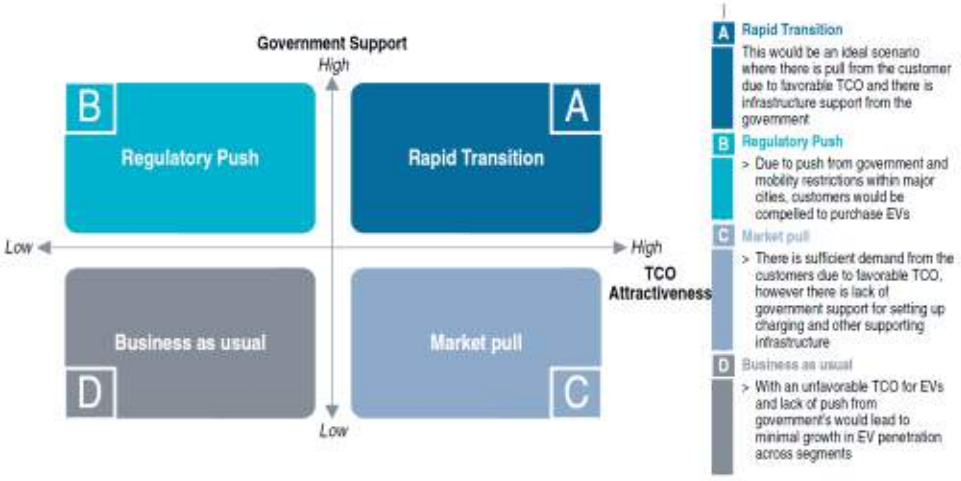
Citing a few interesting estimates from the Roland Berger study on the market potential for EVs, Jeffry Jacob revealed that the EV penetration rate could stand in the range of 15-18 percent for four-wheelers, about 35 percent in two-wheelers and 46-63 percent in the three-wheeler segments by 2025 (all under the most likely scenarios). The study clearly highlights that electric two-wheelers offer the most favorable TCO as it expects the price difference between the ICE and EV two-wheeler(s) to be in the range of Rs 10,000. Therefore, it appears that in such a case, the EV purchase (in the 2W market) will largely depend upon the technology acceptance among the customers.

The Roland Berger study also predicts that the transition from ICE

POSSIBLE ELECTRIC VEHICLE SCENARIOS FOR INDIA

Based on EVs' TCO attractiveness for customers & push/support from government, 4 possible scenarios can be identified for the future

Possible EV scenarios for India

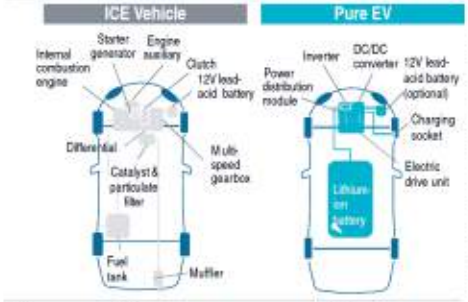


POSSIBLE ELECTRIC VEHICLE SCENARIOS FOR INDIA

The electrification of powertrain is inevitable - traditional powertrain component suppliers MUST ACT NOW ...

Changes in 4W powertrain due to EV, Indian industry dependence on ICE components

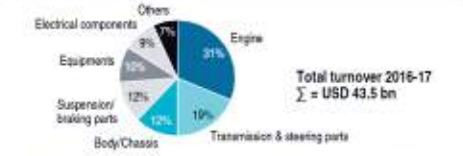
EVs are expected to account for ~18% of passenger car sales by 2025



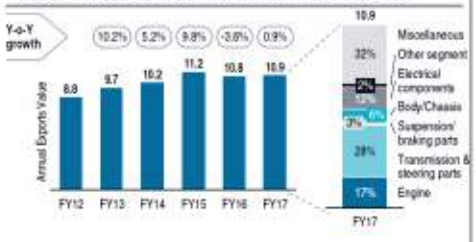
	ICE Vehicle	Pure EV
2017	~100%	~0%
2025	82%	18% (most likely scenario)

Market for traditional ICE components such as combustion engine, clutch, exhaust systems, etc. would be under threat from increasing penetration of EV

Traditional ICE components account for ~50% of Indian auto-component industry revenues



Exports of auto components from India [USD bn]



engines to pure electric technology would drastically cut down the number and types of components required to assembly vehicles currently.

"Let's assume if a conventional vehicle requires 125 different parts currently, this count will be reduced to only 24-25 parts per vehicle under the adoption of electric vehicles in India. This is an about 80 percent reduction in the total parts required for a vehicle under the EV regime," said Piyush Munot, quoting the study.

Fewer moving parts in EVs clearly indicate reduced maintenance costs thus potentially impacting the aftermarket too. EV adoption, as per the study, could negatively impact the aftermarket revenues by around 8 percent by 2025.

Although the industry delegates were of the consensus that the market for ICE vehicles will continue to offer plum opportunities in the foreseeable future, they also underline the importance of evaluating the different domains and competencies to work towards remaining future proof.

"The EV R&D efforts in India are 5-8 years behind global developments in a rapidly evolving industry. Even not considering the impact on the domestic market, the technology gap is expected to hurt the (component) exports significantly. xEV technologies are maturing and require high investments leading to substantial technology risks," quotes the Roland Berger study.

It goes to add, "The ICE powertrain contributes to over 60 percent of the employment generation in the auto component sector. Significant investments will also be affected (under sharp focus on EVs curbing all other forms of mobility tech) as the ICE powertrain is the most technologically advanced segment of the industry. These investments have a direct relation to India's GDP. Therefore, the industry needs to be nurtured and guided on its path of electrification or else the country faces the risk of losing these jobs and investments."

Notably, the government's EV vision targets putting six million EVs on the road by 2020 including around one million electric three-wheelers and about 10,000 electric intra-city buses by mid-2019.

STAKEHOLDERS' PERSPECTIVE ON THE EV ROADMAP

In another session focusing on the stakeholders' perspective, Antoni Vives of The City Transformation Agency, Barcelona, who is understood to be an international consultant to the government of India on its several smart city and electric mobility projects (Pune smart city project in this case), said, "If you are able to combine the production of solar energy with the EV charging infrastructure, the problem of mass adoption of EVs is solved."

Vives is an auto industry veteran who has previously worked with Nissan. He is also credited to have led a number of smart city projects in Barcelona.

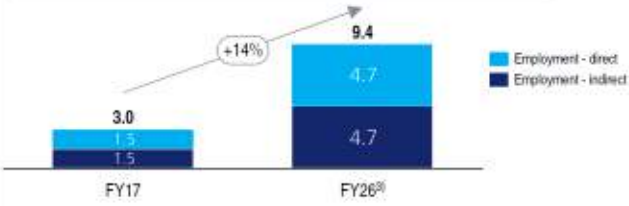
Meanwhile, May Arthpan of LMC Automotive had a conservative estimate of the EV penetration in the passenger vehicle

INDUSTRY NEEDS TO BE NURTURED ON PATH TO E-MOBILITY

And with industry investments and jobs at stake, the country cannot afford to lose the domestic component industry in her quest for EVs

Employment and investments in the auto component sector in India (FY17, FY26)

Total employment in the auto component sector [m][1]



Cumulative investments in the auto component sector [USD bn][2]

- ICE powertrain contributes to over 60% of the employment generation in the auto component sector, thus potentially impacting up to 5.6 m in employment by FY2026 in a 100% EV scenario
- Significant investments will also be affected as ICE powertrain is the most technologically intense/advanced segment of the industry
  - These investments have a direct relation to the GCF and GDP growth of the country
- Therefore, the industry needs to be nurtured and guided on its path to electrification or else the country faces the risk of losing jobs and investments

1) Indirect employment includes employment related to contract work, logistics and other support functions (canteen staff, etc.); 2) Gross block; 3) based on AMP targets

GOVT. SUPPORT IS CRUCIAL TO BUILD A VIBRANT, GLOBALLY COMPETITIVE BEV ECOSYSTEM IN INDIA

Recommendations for Government

1 Policy support

1.1 Develop a **long term coherent, consistent, phased & technology agnostic industrial policy for xEVs in India**, with alignment across ministries & distributed efforts across different levels of the administration (national, state & local)
- > Support a proportion of viability gap for each technology (BEV/hybrid)

1.2 **Address critical issues in detail upfront** (e.g. battery swapping related liabilities, recycling, etc.)
- > Study what use cases lend to what technology (BEV/hybrids)

1.3 **Address issues of inverted duty structures for xEV components**, to ensure pick-up of local mfg.

2 Support for capability development

2.1 **Support localization and technology transfer** similar to **Chinese approach**
- > Interest subvention for new capital equipment for electric mobility
- > Support for collective buying of basic xEV technologies from outside the country
- > Support for study missions for technology tie-ups with China, France, Europe

2.2 **Additional R&D support for electrification for the auto-components industry**, especially for MSMEs, startups and academia

3 Support for scale development

3.1 Support scale via **manufacturing (supply) related incentives**
- > Priority lending for EV related projects through PSBs
- > Concessions in electricity tariffs, property taxes and tax breaks for EV division until full production
- > Priority allotment of land and services like water, electricity & speedy execution of administrative processes

3.2 Drive **standardization** and align with **global best practices to drive down cost and enable exports**

(PV) segment in India by 2030. She estimates EV penetration could be around 9 percent of the overall PV fleet in India by 2030. This is against SIAM's target of reaching up to 40 percent by 2030. Arthapan also highlighted that EV demand in Asia is expected to grow significantly (including hybrids and pure electrics) with concentrated expansion in China where hefty fines are levied for non-compliance. "India could potentially see scalable volumes for EVs but there are risks associated with the volumes. The rest of Asia will struggle to promote EV adoption due to multiple challenges including high technology and charging infrastructure costs, absence of supply chain for EV production ecosystem," she added.

As regards the adoption of EVs in the ASEAN region, a fast-growing market eyed by all global automakers, in the near future, she said: "ASEAN will trail behind (global) peers in electrifying their vehicle fleets. EV policy, in some markets, does not even mandate Evs," she said.
Giving an OEM perspective, Dr AK Jindal of Tata Motors highlighted that the automaker is working on developing new technologies around the domains of vehicle control strategy, EV and hybrid battery development, traction system development, high voltage components and safety, NVH refinements, durability testing and customer trials and lightweighting.

Companies such as Tata Motors, JBM Auto (and several other OEMs) appear to have prepared a viability gap analysis comparing the cost of ownership of an electric car versus a conventional car, based on certain assumptions. Their findings majorly conclude that the drop in battery prices will play the main trigger point in the mass adoption of EVs worldwide.

GREEN BUS TO A CLEANER FUTURE

According to the representatives from Tata Motors, KPIT and JBM Auto, the total cost of ownership of an electric bus would be more favorable but over a certain span of years (of operations). "A smart electric bus can make big impact under four heads – clean, connected, comfortable and safe technologies. While mass adoption of electric buses can lead to lower oil imports, through connecting tech they can offer better scheduling and provide higher efficiency to the operators, along with providing superior driving (for driver) and riding experiences for the passengers. Smart electric buses can also offer real-time tracking and advanced safety features," remarked Chinmay Pandit of KPIT.

KPIT has tested its electric bus at Bandipur forest reserve. "We have very positive feedback on it. We tested the electric bus there for 42 days of trial, completed 76 safaris. We have covered 2,700km. The bus is a 16-seater with a running range of 100 kilometres," disclosed Pandit.

Nishant Arya of the JBM Group and Pandit of KPIT jointly reiterated the need for proactive government push, fiscal incentives and zero GST (and reduced tax burden at the state level) on the electric mass transport system. They also suggested that the government can revise its approach via STUs that work as operators of the intra-city bus transportation system across cities. "Battery pack, power electronics and distribution, electric motors, transmission and other services are a few heads which the existing supplier ecosystem can explore and evaluate to venture into in the future to ready itself for the EV regime," pointed out Arya of the JBM Group.

HOW INDIAN COMPONENT SUPPLIERS CAN GET FUTURE-READY

Indian suppliers need to swiftly catch-up on their EV tech. & business readiness by tech. acquisitions, collaborations & capability demonstrations

Recommendations for Indian suppliers

Pivot towards EVs, acquire technology capabilities & leverage customer access

1. De-risk your current business by pivoting towards - a) EV opportunities, b) non-automotive opportunities that leverage supplier capability
2. Tie-up with international partners to complement their technology capability with own frugal engineering approach
3. Conduct non-competitive R&D by leveraging EV ecosystems (research institutions, suppliers, OEMs, etc.)
4. Demonstrate technology capabilities to Indian and global OEMs, e.g., in e-motors, electronics and battery packaging

According to him, localisation of battery technology will happen in three phases, wherein phase one will include assembly of battery pack and integration with the battery management system (BMS). It is understood the Indian auto industry is currently in its first phase of the setting up of the battery supply ecosystem.

CHALLENGES AND OPPORTUNITIES

Umesh Shah of Gabriel India presented a useful analysis of the opportunities and challenges for the auto suppliers under the transition to electric mobility. "The shifting value equation from mechanical to electronics and software is the single biggest challenge in itself for the supplier community. The new operating and product requirements are very different than what they were in the past. Then the pricing challenges also prevail. However, the opportunities are no less. Suppliers associated with battery and battery management will enjoy most benefits, the suppliers will be required to be agile and capable of competencies around electronics domain as OEMs will look for sub-system suppliers," he elaborated.

SUPPLIERS NEED TO ACQUIRE TECHNOLOGY THROUGH INORGANIC ROUTES, GIVEN THEY ARE 7-8 YEARS BEHIND GLOBAL COUNTERPARTS

Potential sources for tech. acquisition for various traditional supplier segments (select)

	Technology topics	Potential global tech. partners	Potential R&D institute partners
Engine component suppliers	Battery cooling & packaging, e-motors, etc.	MAHLE, LG Chem, GS YUASA, CATL, MAGNA, Valeo	ARAI, Oak Ridge
Transmission component suppliers	E-motors, single speed reduction gears, efficiency improvements, shift-by-wire, etc.	MAHLE, oerlikon, MAGNA, Valeo, ZF	Fraunhofer
Body/Chassis component suppliers	Lightweighting, battery cooling & packaging, etc.	MAHLE, LG Chem, GS YUASA, CATL, Valeo	Oak Ridge, Fraunhofer
Suspension/ Braking component suppliers	Regenerative braking & suspensions, brake-by-wire, etc.	BOSCH, MOBIS, Autoliv, ZF, Infortronic Gresser GmbH	

	Technology topics	Potential global tech. partners	Potential R&D institute partners
Steering & other equipment suppliers	Steer-by-wire, power consumption reduction, etc.	Valeo, BOSCH, JTEKT, SCHAEFFLER	KIT
Electronic components suppliers	Power consumption reduction, thermal mgmt., BMS, power electronics, etc.	LG Chem, ZF, DENSO, Valeo	ARAI, Oak Ridge, Fraunhofer
New suppliers	Battery production, synthetic graphite production, recycling & extraction of materials, charging stations, BMS, telematics, etc.	LG Chem, GS YUASA, CATL, IMERYS, EVgo, Panasonic, Valeo, ABB	ARAI, Oak Ridge, Fraunhofer, KIT, Argonne

"The opportunities around the manufacture of components (electric motors, controllers, electric HVAC, chargers, high voltage electrical parts, software integration and others) for EVs can be explored in a phased manner as the volumes grows over time," he added.

According to Shah, charging stations, station and security, software around charging technologies and recycling and reuse of batteries are going to be a few emerging opportunities in the future.

"The electric mobility impact is for real and it will affect all the stakeholders. To survive, product and environment knowledge is critical and the ability to collaborate and co-create is taking centre stage," said Shah, making his recommendations on the approach suppliers must take up to remain relevant in the fast-evolving industry.

PUNE MUNICIPALITY TO BUY 500 E-BUSES

In the concluding session, which saw Siddharth Padmakar Shirole, member of the standing committee, Pune Municipal Corporation, and director, PMPML, as the chief guest representing participation from the local government authority, the panel members spoke about their suggestions on how to co-create a robust EV ecosystem in India.

In a move that will give a major boost to green mobility in the city of Pune, Maharashtra, Shirole of the Pune Mahanagar Parivahan Mahamandal (PMPML) announced plans to buy and induct 500 electric buses and 2,000 electric rickshaws in 2018.

"These 500 electric buses will be inducted this year. Maharashtra chief minister Devendra Fadnavis has already given his approval for the same. I will see that all these buses ply on Pune roads by the end of this year. We don't only plan to buy buses but we are looking to set up the entire infrastructure including the operators and the electric charging systems. The requirement of electric rickshaws, aimed at enabling last-mile connectivity and feeder services for the electric buses in and around the Pune city, can be scaled up to 10,000 units," he told Autocar Professional.

According to Shirole, the allocated budget to buy new buses for public transportation stands at Rs 550 crore, which will also include purchase of around 800 CNG buses. The state government is also planning to buy 100 electric buses for Nagpur and 200 electric buses for Mumbai this year. These tenders and government buying are helping the OEMs with the much-needed momentum to their tech development projects in electric mobility.

Commenting on this, Nishant Arya, executive director, JBM Auto, which has begun manufacturing electric buses, said: "This is very good news for manufacturers like us. We are not new to making electric buses but orders like these clearly help us adopt the electrification theme."

Responding to this announcement, Chinmay Pandit, president and Board Member of Impact Automotive Solutions, a wholly owned subsidiary of KPIT Technologies, who is also responsible for the company's alternate powertrain products line and the Revolo green technology business, said: "The leadership at PMPML is very aggressive in working towards a zero emission public transportation system. It is very good news that PMPML isn't only buying electric buses. They plan to buy the entire ecosystem that can manage and operate these vehicles effectively. Many buses bought under previous public transportation schemes aren't maintained properly and can be found rusting in junkyards. Hence, this approach of setting up the right infrastructure for electric buses including the charging stations and operators is the right way to go for. It's important to make the operators responsible for effective management of public transportation system."

Meanwhile, all eyes now will be on the second part of the FAME India scheme, which is set to be tabled soon by the Department of Heavy Industries. Sources say the government is taking into consideration all the inputs provided by the auto industry from the implementation of the FAME India scheme so far.

ACMA statistics have it that the Indian component industry has been growing at a CAGR of 7 percent over the last five years, and provides direct and indirect employment to about three million people. The auto ancillary sector is understood to have invested about US$ 13 billion in the last 10 years, and it aims to further invest around US$ 30 billion in the medium term until 2026. On the export front, the Indian auto component industry is targeting shipments worth US$ 70-80 billion by 2026.

Now, with vehicle electrification picking up pace, the component industry will have to adapt and invest in new technology, if it is to remain a pillar of growth.

GYAN DARSHAN - VISIT TO SUBROS LTD., NOIDA

NR HR FORUM

As a practice, the Gyandarshan visits are arranged to the ACMA Award Winning organizations every year. This year a visit was organized to Subros Ltd., Noida on 28th February, 2018. They won Gold Award in Excellence in HR and Excellence in Technology - Product Innovation in December 2017.

Subros won four ACMA Awards and all were in Gold Category. The details are:

- Excellence in Technology - Product Innovation by both Noida and Manesar Plants

- Excellence in HR - Gold Award - Subros, Noida
- Excellence in Supplier Development – Subros, Manesar

The objective of these visits are to share the success stories and witness best practices. It also gives platform to members to learn from each other.

5TH ACMA MSME SUMMIT

MSME COMMITTEE

ACMA MSME Committee organized the 5th MSME Summit themed Infusing Modern Technology for Competitiveness on March 26, 2018 at Hotel Le Meridien, New Delhi.

Mr J S Rangar, Chairman, MSME Committee gave a warm welcome to the Chief Guest, panellists and participants. He said "SMEs are the backbone of the industry. The future prosperity of any economy depends to a considerable extent on its success in promoting entrepreneurship, innovation, and the effective and prompt absorption of technological development". In all of these processes, MSMEs play a critical role in the development and growth of any economy.

The MSME sector, has an enormous economic, social and environmental impact. However, the sector faces several challenges, including strong international competition, pressure to use key resources like energy, water and raw materials more efficiently and to implement more environmentally sustainable production processes. By updating and adopting green and inclusive innovations, India's MSME sector can create new economic opportunities and strengthen its long-term competitiveness.

Addressing the participants Mr. Ram Venkataramani, Vice President of ACMA said, "MSME plays a pivotal role in the overall industrial development of the country. However, they are also the weakest link in the automotive supply chain because of absence of timely banking finance, limited capital and knowledge, high cost of credit, lack of skilled man power, lack of access to global markets". Moreover inadequate access to latest technology has hampered the growth of MSME segment and prevented it from graduating to the next level. Indian MSME need to work closely with institutions and universities which can collaborate with MSME in auto component sector to support in enhancing the technology upgradation.
Mr Kaushik Madhavan, Frost & Sullivan presented the theme presentation on Opportunities in Collaborative Competence Development. The presentation elaborated on the Auto manufacturers to focus on making optimum use of production facilities to bring down the capital spending and production of varied models. Additionally the five pillars of digitization for the automotive industry which are connected supply chain, Industry 4.0, Connected and automated car, Digital Retailing and Mobility as a service were elucidated.

Mr. Sudhir Rao, Managing Director, Bombardier India, the Chief Guest at the summit said that there is a window of opportunity in the industry and the SMEs has to use it. Companies need to break in the larger size because without the larger size one would not be able to invest in technology.

The summit also included eminent speakers namely Mr. Sanjiv Singh – Gilard Electronics, Mr Kavan Mukhtyar – PwC, Mr. Zubin Jagtiani – Think7, Mr Nishant Jairath – Metalman Auto, Mr. Tushar Arora – Abilities India, Mr Sunil Chaturvedi – ASDC, Mr Sumit Kumar – TeamLease Skill University, Mr. S P Ghosh – Sterling Tools, Mr Rajneesh Sing – Simply HR.

The deliberations at the summit were very educative, informative and highlighted the opportunities and challenges in the sector. The feedback received from the participants was very positive. Over 80 participants attended the summit.

FROM THE REGIONS

EASTERN REGION

MEMBERS' INTERACTION & OPPORTUNITY FOR BUSINESS GROWTH & DEVELOPMENT

ACMA Eastern Region organised its member's interaction with Mr. Y. K. Lee, Director and CEO Procurement Division, Hyundai Motors on March 16, 2018 at CFE, Jamshedpur. The objective of interaction with Mr. Lee was to bridge the strategic collaboration between Korean and Indian companies for business development.

Mr. Sabharwal, Chairman, ACMA Eastern Region, referred to his earlier interaction with Mr. Y. K. Lee during an ACMA delegation last year. He observed that the Korean companies were interested in India because of the success story of Hyundai and its public announcement that KIA Motors would be investing in India. In fact more than 200 companies in Korea are ready to come to India and partner with Indian companies.

He also observed that the Korean companies are very keen to work through a Korean expert only and Mr Lee and his company work towards connecting Indian suppliers with their Korean counterparts for creating mutually rewarding relationships through joint ventures, technical collaborations and sourcing agreement.

Mr. Ranjot Singh, Dy. Chairman, ACMA(ER), highlighted the facts that the industry is growing and all the industries are working at their optimum capacities. ACMA is the only organization taking initiative for the business development of member companies and the component industry in general. The strength of the eastern region is, out of 50% of commercial vehicles produced by Tata Motors, 30% are produced by Jamshedpur. "The market has good traction and the possibility of growing for us is much higher if bring the technical know- how from other countries to remain more competitive.

NORTHERN REGION

8TH ACMA INVITATIONAL GOLF TOURNAMENT

ACMA Northern Region organised the 8th edition of Invitational Golf Tournament on February 10, 2018, Gurgaon, concurrent with the 14th Auto Expo 2018. ACMA Northern Region's Golf Tournament brings popular golfers from across India who look forward to meeting their existing contacts and build new ones. In all 26 Golfers played at the tournament on March 23, 2018.

Mr. R C Bhargava, Chairman, Maruti Suzuki India Ltd. was the Chief Guest to "tee-off" ACMA (NR)'s 8th Invitational Golf Tournament.

The other Key participants for the day included; Mr. Hemant Sikka, Chief Purchase Officer - Auto & Farm Sectors, Mahindra & Mahindra Ltd.; from the ACMA Executive Committee included, Mr. Rattan Kapur, Past President, ACMA & Chairman & MD – Mark Exhaust Systems Ltd.; Mr. D K Jain, Past President, ACMA – Lumax Industries Ltd.; Mr. Pravin Malhotra, CMD, Nipman Fastener Industries Pvt. Ltd.; Mr. Jagdeep Rangar, MD, Stork Rubber Products Pvt. Ltd.; The Regional Committee and other ACMA members who participated at the Tournament included: Mr. Anil Minda, MD, Anu Industries; Mr. V.K. Jayaswal, ED-Works, Shriram Pistons & Rings Ltd.; Batras of Magnum Industries; The Tournament was marked by the presence of officials from the Government departments included: Mr. Ajay Kumar Bisht, Commissioner – Delhi Development Authority; Mr. Suresh Kumar Goyal– Director – Minsitry of Consumer Affairs; Mr. Rajat Bansal, Joint Secretary, Ministry of Commercial Affairs, Mr. Subhash Chandra , Delhi Transport Corporation – Chief General Manager; Mr. Pawan Kumar, Department of Economic Affairs – Adviser; Participation from the Diplomatic core included: Mr. Andrea Fall – from the Embassy Austria.

The winners of the tournament were:

1	Max. Pars	Mr. Tushar Arora
2	Max. Birdies	Mr. Andrea Fall
3	Closet to the Pin	Mr. Vaibhav Soni & Mr. V K Jayaswal
4	Winner Ladies	Mrs. Hirooka
5	Runner Up (0-12)	Mr. Vaibhav Soni
6	Runner Up (13-24)	Mr. J S Rangar
7	Winner Nett (0-12)	Mr. Vivek Talwar
8	Winner (13-24)	Mr. Anil Minda
9	Runner Up Gross	Mr. Tushar Arora
10	Winner Gross	Mr. Rahul Jain
11	Runner Up (13-24) Special Prize	Mr. Rajat Bansal
12	Winner - Special Prize	Mr. Subhash Chandra
13	Winner - Above 70	Mr. D K Jain
14	Runner Up - Above 70	Mr. R C Bhargava

2ND NATIONAL CONFERENCE ON GOODS & SERVICES TAX (GST)

Goods and Services Tax (GST), one of the most radical tax reforms in the history of Indian economy, has been effective from 1st July 2017. Since its implementation various measures have been taken to improve tax collection systems for the benefit of the businesses. Recently E-Way bill has also been introduced from 1st February 2018 with an objective to ensure that goods transported comply with the GST Law to track movement of goods and check tax evasion. In order to provide the complete details on GST, ACMA took the initiative and organized a conference on Goods & Services Tax on 28th February 2018 in New Delhi.

Welcoming the ACMA leadership the members of Northern Region Mr. Deepak Jain, Chairman – Northern Region. He highlighted that ACMA (NR) has been working aggressively towards preparing and updating its members to on training of GST.

Addressing the participants Mr. Sanjay Malhotra, Chairman, ACMA GST Working Group appreciated the government for implementing

GST and also for coming with a budget which is pro auto component industry. He welcomed all the distinguished Speakers and all the Session Chairmen.

Thanking the speakers, delegates and invitees, Mr. Vinnie Mehta, ACMA Director General mentioned that a lot of insight and foresight about GST, would be provided by the various session speakers that would be useful for all the member companies to understand the impact of GST for Auto Component Industry and learn from it.

Addressing the participants the Session One Speaker – Ms. Prashanth Agarwal, Partner – Indirect Taxes, PWC, India presented a detailed Overview of GST in India – wherein he touched upon Expansion of Tax Base, Pruning of Tax Rates, Legislative changes and overall Ease of doing Business.

Mr. Abhishek Mishra, Associate Director, KPMG, voiced the presentation in which Meaning and Scope of 'E-way bill' was provided in brief covering list of forms related to be filled in the bill and its applicability was covered. Mr. Mishra, also communicated to the delegates about the 'Anti-Profiteering Measures'.

Mr. Praveen Kashyap – Director, Grant Thornton India, in the Second Session of the conference explained to the invitees about 'Refund against Export and Area Based Exemption'.

Mr. Kunal Chaudhary - Partner, E&Y and Ms. Parul Nagpal – Director, E & Y were the speaker for the Third session of the conference, who highlighted through a presentation the impact of 'Reverse Charge Mechanism and Transitional Provisions' in GST for the auto component Manufacturers.

IN – HOUSE TRAINING PROGRAM ON ADVANCED EXCEL

ACMA Northern Region organized an in – house training program on Advanced Excel on February 14, 2018 at Sansera Engineering Pvt. Ltd. Uttarakhand.

The objective of the program was to understand higher functions of Excel, pivot tables to improve productivity, enhance spreadsheets with templates, charts, graphics, and excel formulas and streamline operational work.

The faculty for the training was Mr. Pradeep Agrawal who covered topics on key board shortcuts, controls, cell comments, naming cells and ranges, advanced formula's and functions, recording macros and using visual basic for applications (VBA) among others.

TRAINING PROGRAM ON LEAD TIME REDUCTION & VISIT TO LUMAX INDUSTRIES

ACMA Northern Region organised one day training program on Lead Time Reduction through Value Stream Mapping on February 21st 2018 at Lumax Industries Bawal followed by a shop floor visit.

The Plant Head Mr. Sajjan Singh, of Lumax India Ltd., led the team and welcomed all the participants. He provided an overview on Lumax Bawal.

The objective of value stream mapping is the creation of a future state map, which lays out a vision for the implementation of a value-adding flow in the production and design of products or the delivery of services. In simple terms VSM is - Visually documenting the flow of materials and information from customer to beginning of the process.

The visit was highly enriching for the participants.

ACMA SAFER DRIVES CAMPAIGN

During the National Safety week ACMA Northern Region organised ACMA Safer Drives road show in Uttarakhand Zone from 10th to 11th March 2018 with the support of ACMA members, OEMs and Uttarakhand Police.

The National Safety Week observance has been initiated by National Safety Council & Ministry of Road Transport & Highways and this time it was from 04th to 11th March 2018.

The objective of roadshow was to spread awareness among the public to use genuine parts, safe driving and popularise safety tips & symbols.

Road safety is an issue of concern both at national and international levels, prompting the United Nations to proclaim 2011-2020 as the

Decade of Action on Road Safety. As immediate measures to bring reforms in traffic rules of the country and to ensure complete adherence to these rules, Ministry of Road Transport and Highways is also actively engaged in creating Road Safety awareness through various means along with other enforcement measures including overhauling in the Motor Vehicles Act.

Speaking at the roadshow, Chief Guest Mr. Sadanand S R Date , IPS, Uttarakhand Police said "our target is to have an accident free roads, safe driving and create awareness & apply strict rule is the key for safety".

The whole activity was highly appreciated by Uttarakhand Police department, OEMs, local Industry association & general public.

ONE DAY TRAINING PROGRAM ON FINANCE FOR NON-FINANCE PERSONNEL

ACMA Northern Region organised an in-house training program for its members on Finance for Non-Finance Personnel at Roop Polymers Ltd. on March 14, 2018.

The objective of this program was to Raise the level of financial awareness of participants and enable them to use the financial information provided to make better short-term or long-term decisions in managing their businesses with "Why-Why analysis".

The faculty for the training was Mr. Neeraj Kr. Verma - a corporate trainer and a certified financial planner.

Mr. Verma covered the topics on introduction to accounting and finance, revenue vs capital expenditure, cash vs accrual system , income statements and its components like operating expenses , PBT , PAT , EBIDT, Net Profit, Depreciation, Finance Expenses and net profit, statement of cash flows and operating cash flows, understanding balance sheet among others

SPECIAL INTERACTIVE SESSION WITH MR. NEERAJ MATHUR HERO MOTCORP. LTD.

ACMA Northern Region organized an interaction for its members with the Supply Chain team of India's largest two-wheeler manufacturer – Hero MotoCorp. Ltd. on March 14, 2018. The objective of the interaction was to understand the future industry scenarios one in which multiple player categories are likely to benefit as the auto industry is undergoing dramatic changes with evolving customer expectations, acceleration of technological innovation and shifts in competition.

Welcoming the ACMA leadership the members of Northern Region Mr. Deepak Jain, Chairman – Northern Region, gave a brief on the activities organized in NR. He congratulated Hero MotoCorp for being an outstanding best performance company for the last 17 years (World's No.1 – Two Wheeler manufacturing Company).

Addressing the participants at the Special Interactive Session – Mr. Neeraj Mathur, Vice President – SS & SC explained the company's forward movement through its core values (3 P's) and vision. He mentioned that Integrated Management System, Strategic Sourcing, New Model Launches, Cost Management, Supplier Development, Relationship, Logistics, People Development & Supplier Capacity are the nine important factors that make the strength of the company.

Mr. Mathur mentioned that Hero is able to sell record numbers (3,23,000) during festive time, in a single day due to the Cumulative Efforts and Planning by the team.

The evening interaction was concluded with Vote of thanks by Mr. Sunil Arora- Chairman of ACMA.

4TH KAIZEN CONTEST

ACMA Northern Region organised the 4th Kaizen Contest for its members of Delhi NCR zone, on March 23, 2018 in New Delhi. 35 teams from Northern Region membership participated in the competition which witnessed over 50 delegates. The 3 member jury consisted of Mr. Bijender Kaushik – DGM, India Yamaha Motors Pvt. Ltd, Mr. Rohit Joshi – AGM (QC), Maruti Suzuki India Ltd. and Mr. Deepak Agarwal – Expert, ACMA.

Mr. Sunil Arora, Chairman, ACMA Northern Region highlighted that ACMA's initiative in starting the Kaizen Competition was highly appreciated by the ACMA membership and complimented for their overwhelming participation. He mentioned that Kaizen has been a successful methodology for achieving perfection by eliminating waste (muda) in the workplace (gemba), also for targetting production without wastes by improving standardized activities and processes.

Complimenting all the participating teams, the Chief Guest, Mr. D K Sethi, Executive Director – QA, Maruti Suzuki highlighted on the following important points as the key take-aways for the participants:

1. Philosophy of Continuous Improvement
2. Key to do the best all the times and not to be complacent
3. Kaizen should be adopted by the complete chain and hence the Horizontal Deployment is very essential
4. Kaizen not just improves cost, production and quality but it improves work and life.
5. In view of future of public transportation system, Kaizen has an important role to play

Delivering the Vote of Thanks at the Valedictory, Mr. Vinnie Mehta, Director General, ACMA apprised the members of the current industry scenario and thanked the Chief Guest for his motivating address and the Jury team for their whole hearted support to ACMA, the participants for their enthusiastic participation and the sponsors for their support.

The winners of 4th Kaizen Contest, ACMA Northern Region were:

Company Name	Team Name	Kaizen Theme	Winners Position
Rockman Industries Ltd. Ludhiana	Pragati	Quality Improvement in FFD	1st Position
Sellowrap Industries Pvt. Ltd., Gurgaon	Max. Pars	Cost Reduction by changing manual operation to semi-automated	2nd Position
Subros Ltd., Manesar	Laxya	Elimination of extra brazing material	3rd Position
Shiroki Technico India Pvt. Ltd., Gurgaon	Diamond	Productivity improvement through reduction in machine idle time and operator movement	3rd Position
New Swan Enterprises IV, Tapukara	Sigma	Cost Saving	3rd Position

SOUTHERN REGION

7TH SMED & 2ND POKA-YOKE COMPETITION OF SOUTHERN REGION

14 SMED teams and 25 Poka-Yoke teams competed at the 7th SMED and 2nd Poka –Yoke Competition of ACMA Southern Region on February 17, 2018 at Bangalore. 3 teams from two MSME companies also participated in the competition.

As part of the industry and academia engagement the completion was held in New Horizon College of Engineering, Bangalore. The platform enabled the faculties and students to witness live projects of the industry and to understand the concepts of SMED and Poka-Yoke which are very prevalent in the industry.

Dr Lakshminarayana, Head of Placements and Training, New Horizon College of Engineering at the inaugural session spoke about industry academia engagement and how industries could collaborate with institutes for specific auto projects. The way forward would be to bridge this gap by working together to make the curriculum relevant. He highlighted the MoU with French Govt. for the setting-up the Schnider lab at NHCE. The institution had also set up SAP labs and Adobe Center of Excellence at NHCE to expose students to the latest industry needs. A tour to these labs and interaction with the faculties were also organized during breaks of the event. They have industry collaborations with Quest Global, Autoliv India Ltd, Sansera Engineering P Ltd to mention a few.

Dr Lakshminarayana thanked ACMA for this unique opportunity given to their students and faculties to witness the live projects of the Industries and how these concepts of SMED and Poka-Yoke are important concepts at the industries.

The Jury at the event included Mr T S Manjunath, DGM-MSS, Ashok Leyland Ltd., Mr Manohar Rajamony, Divisional Manager – Production Engineering, TAFE, Mr Vinod V, DM -PE (Weld Press & Die), Toyota Kirloskar Motor and Mr Moktar Shariff, DM -PE (Weld Press & Die) SCANIA Commercial Vehicles India Pvt Ltd.

Mr S Baligar, Zonal Co-ordinator, ACMA (Southern Region - Karnataka & Hosur Zone) during the valedictory address thanked the Jury members – the customers of the auto component sector, for having spent the entire day adjudicating all the presentations and giving their inputs and suggestions to the participants during the day. Mr Baligar also thanked New Horizon College of Engineering for having hosted this competition and spoke about how ACMA was engaging with Institutions, which would help the academia realize the requirements of the industry.

The Winners were as follows:

SMED WINNERS

Company Name	Team Name	Position
JM Frictech India Pvt Ltd	Improve FTR	1st
WABCO India Ltd.	LCA Team	2nd
Brakes India Pvt Ltd	Sholinghur Hydraulic Challengers	3rd
Hanon Automotive Systems India Pvt Ltd	Press Champs	3rd

J M Frictech India Pvt Ltd an SSI company was highly appreciated for winning the first Prize in the SMED competition while competing amongst the teams from Large and medium enterprises.

The event saw over 100 participants including delegates who joined as observers that provided an opportunity for cross learning and sharing of best practices and termed the event as a good learning ground with ideas as take- aways. Close to 100 students and few faculty members spent quality time at the event to understand the concepts and learn from the live case studies presented during the day.

TRAINING ON INDUSTRIAL RELATIONS AT BIMETAL BEARINGS LTD

ACMA Southern Region organized a training on industrial relations at Bimetal Bearings Ltd, Coimbatore on February 8, 2018. This training was organized based on feedback from members in the Coimbatore Zone.

The faculty for this program was Mr R Kumar a qualified Lead auditor for BS 18001.

The topics covered during this training helped the participants to enhance their knowledge on the various facets of IR and the process involved for convincing negotiations

The training was interactive with discussions revolving around collective bargaining at different levels and tips for meaningful negotiations.

The participants found the training relevant and informative. 10 delegates from 4 companies attended this program.

TRAINING ON WORKSTATION STANDARDISATION IN TAMIL AT DELPHI-TVS DIESEL SYSTEMS LTD

ACMA Southern Region organized a training on workstation standardisaiton in Tamil at Delphi-TVS Diesel Systems Ltd, Mannur in Chennai on February 15, 2018. The faculty for this program was Mr V Kartheeban.

The training covered the difference between standard work and standardized work, key points for daily excellence, basic working team (BWT), BWT leader & Standardisation, Goals of basic skill training, 5S in WSS, 3D audit schedule and compliance, 5S in WSS, and Operator training and skill.

The highlight of the training was the guided plant tour which showcased the plant layout, components manufactured and assembly line. A tour to the heat treatment plant was also organized which covered the descaling furnace, sealed quench furnace, pre healing furnace, tempering furnace and high tempering furnace. Delphi-TVS also showcased 5S Audit score board and performance analysis board. The following were observed by the participants as key takeaways from the visit and training

- New process observed – critical parts
- New technology used
- How ordering is done
- SOP tool life available
- Complusory learning/reading
- Visual display checksheets
- Control charts and
- Man machine charts

The faculty also covered five key principles namely value, value stream, flow, pull and perfection including seven wastes overproduction, waiting, transporting, inappropriate processing, unnecessary inventory, unnecessary excess motion and defects. In addition to this participants were also trained in Five lean tools and principles like value stream mapping, Takt time, Ishikawa, Hejunka, Poka-Yoke and the next steps.

20 participants from 6 companies attended the training. The participants feedback found the program was relevant and learning from the presentations fairly high.

ANNUAL SAFETY CONVENTION AT PSG INSTITUTE OF MANAGEMENT

The Third Edition of the Annual Safety Convention was organized at the facilities of PSG Institute of Management on March 9, 2018.

As a first time initiative the Safety Convention was held at an institution in Coimbatore as a conscious step by ACMA to bridge the gap between industry and academia and to expose the students and

the faculty to the industry practices and concepts.

Another new initiative saw for the very first time Safety Debate Competition being introduced at the event, for the participants to help them share their knowledge and experiences on Safety.

Mr Anil Kumar Unni, Senior Director and Regional Secretary, ACMA (Southern Region) gave an overview of the Auto component Industry and mentioned that the safety convention is an attempt to give participants a platform to stay up to date on potential workplace hazards and safe workplace practices, such as machinery use, tool handling, material handling, and safety-minded attitudes.

Dr R Nandagopal, Director, PSG Institute of Management in his inaugural address said, ACMA's outreach to institutions and exposing students to current and relevant industry practices was appreciable and that PSG institutions would be willing to partner for future endeavours too.

Speakers at the Annual Safety Convention at Coimbatore included:

- **Mr K Dhanapal – Senior General Manager** - Operations, TVS Motor Company Ltd
- **Mr Sudhir Bhujbal, Deputy General Manager** – Technical Functions & Industrial Safety and Health – Bosch Electrical Drives India Limited
- **Mr Sridhar Gnanadurai, Deputy General Manager** – HR, Hanon Automotive Systems India
- **Mr S Venkatesan, Manager –** Production Control & Logistics – Toyota Kirloskar Auto Parts Pvt Ltd

Presenting on Plant & Machinery Safety, Mr Sridhar G from Hanon Automotive Systems India, covered aspects of safety in general followed by Plant safety, machinery safety, safety culture, how to measure safety, emergency preparedness & management.

The First Safety Debate Competition gave participants a platform to express their knowledge and experience on Safety. The Guest Speakers formed the Jury members for this Competition.

Each contestant was allowed to speak for 10 minutes on safety. The following were adjudged the winners of the Competition and were given a trophy and certificate :

Position	Name	Company Name
1st	Mr Leo Prince	Pricol Limited
2nd	Mr P Srinivasan	Pricol Limited
3rd	Mr R Srijai Karthik	L G Balakrishnan & Bros

The presentations made on four important aspects of safety gave participants takeaways and perspectives from leading Tier-1 companies and OEM.

In all 26 participants from 12 companies participated in this Safety Convention.

ANNUAL REGIONAL SAFETY CONVENTION AT AVTEC LTD

ACMA Southern Region Karnataka & Hosur Zone organised its Annual Regional Safety Convention on 16th March 2017. The programme was hosted at the facilities of AVTEC Ltd. Mr Ravi Arora - VP – Marketing – AVTEC LTD welcomed all the participants and made a presentation on AVTEC Ltd and its products.

The ACMA annual Safety convention covered all the aspects of

Safety and speakers from various member companies were invited to talk on various safety aspects. Mr Manivannan, Head, Maintenance spoke about the safety at AVTEC, Mr Vikram Rao - Associate Senior Manager EHS, Autoliv India Pvt, Ltd, made a presentation on behavioural safety and Mr Neerajax Babu from Bosh made a presentation on Fire & Electric Safety.

ACMA conducted the first debate competition on Safety to encourage member companies to talk about safety at such forums. 14 contestants participated at the first edition of the debate competition. The contestants spoke about all aspects of safety, safety at workplace, safety at home, safety of the environment as a whole. The participants were grateful to ACMA to provide such a platform to them to express their thoughts on this topics. The following were the winners of the First Debate Competition.

Position	Name	Company Name
1st	Mr Vijay Jadhav	Sansera Engineering (P) Ltd
1st	Mr Madhusudhan	Toyota Kirloskar Auto Parts Pvt Ltd
2nd	Mr Channappa G D	Gearock Forge Pvt Ltd
2nd	Mr Chaitanya Rajur	Continental Automotive Components (India) Pvt. Ltd
3rd	Mr G Parthasarathi	Essae Digitronics Pvt Ltd

The visit to the AVTEC Ltd Plant showcased the safety best practices implemented in the plant. The Plant visit also showed the various processes followed at AVTEC. The participants got an opportunity to witness Robotic Welding Machine, Gear Grinding Machine. Transaxle Leak testing equipment, Transaxle Assembly line and understood the various processes followed at AVTEC.

In all 20 member delegation participated at the safety convention.

ANNUAL SAFETY CONVENTION AT DR MGR EDUCATIONAL & RESEARCH INSTITUTE, CHENNAI

The Annual Safety Convention for Chennai and nearby members was organized at the facilities of Dr MGR Educational & Research Institute, Chennai – continuing ACMA's engagement with Academia an initiative of ACMA Southern Region to bridge the gap between industry and academia and to expose the students and the faculty to the industry practices and concepts.

A new initiative at the Annual Safety Convention was the inclusion of Safety debate competition for the very first time with the intent of helping companies and the participants share their knowledge and experience on safety. Dr MGR Educational & Research Institute students from four streams also showcased and presented various project presentations to the participants of the Safety Convention. This was a win-win situation for both the students and industry members.

Dr V Cyril Raj, Dean (Engg & Tech), Dr MGR Educational & Research Institute University in his inaugural address welcomed the speakers participants and students to Dr MGR Educational & Research Institute University.

Mr G Subash, DGM, Safety, WABCO India Limited shared the company's experiences and knowledge on Fire & Electrical Safety that included

- Electricity & its benefits
- Electrical Accidents
- Electricity & its hazards and Health impacts
- Safe practices & Protection measures
  On Fire Safety the following aspects were presented
- Fire accident statistics
- How does a fire work
- Classes of Fire
- Method of Fire extinction
- Fire extinguisher usage chart
- Different kinds of extinguishers

Material Handling Safety was presented by Mr P Ramachandra Reddy – Senior Manager, Manufacturing & Maintenance, BorgWarner Morse Systems India Pvt Ltd. The following topics were presented to participants

- Safety certification and CSR initiatives
- Safety practices at Borgwarner
- Material handling process, study and ergonomic
- Material handling safety at Borgwarner

Mr N Gopalakrishnan, Senior Manager, EHS, Isuzu Motors India Pvt Ltd.'s presentation on Behavioural Safety focused on:

- Relationship : Hazard-Behaviour-Risk
- Definition : Behaviour Based Safety
- Accident Triangle
- Unsafe conditions and unsafe acts
- The four critical errors and states of mind
- Critical error reduction techniques
- Six pillars of behaviour based safety
- Risk patterns

Further the members found the Safety Convention relevant, with many implementable ideas as takeaway. 22 participants from 14 companies participated in this Safety Convention.

CREATING SYNERGIES - 1ST SECTORAL EXHIBITION AND MEET BETWEEN ENGINEERING INSTITUTIONS AND ACMA SOUTHERN REGION

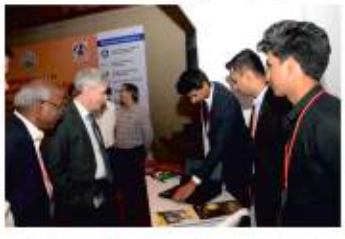
The ACMA Southern Region initiated "Industry-Academia Platform" organised its 1 st Sectoral Exhibition of Engineering Institutions for the automotive industry on January 19, 2018 at Chennai.

9 institutions from Tamil Nadu and Karnataka joined this initiative of ACMA, wherein the students showcased live projects for the automotive sector.

The institutions participated for the meeting were Aarupadai Veedu Institute of Technology(AVIT), Chennai, Chennai Institute of Technology, Chennai, Dr. Mahalingam College of Engineering, Coimbatore, Jain University - JGI Group, Bangalore, Kumaraguru College of Technology, Coimbatore, Mahendra Educational Colleges, Namakkal Dist., New Horizon College of Engineering, Bangalore, Rajalakshmi Engineering College, Chennai and Vel Tech Rangarajan Dr. Sagunthala R&D Institute of Science & Technology, Chennai.

Inaugurating the event, Mr. Erich Nesselhauf, Managing Director & CEO, Daimler India Commercial Vehicles Pvt. Ltd. mentioned that it was important for the industry and academia to work together, innovate and address the challenges of the industry and the environment. Industry-Academia should be part of the ecosystem for development of the automotive sector he opined. Industry-Academia partnerships have been the bedrock for the progress of developed nations, he added.

Speaking on the occasion Mr. N.K. Minda, President, ACMA complimented ACMA Southern Region for this innovative and new initiative of bridging the gap between industry and academia.



Earlier, welcoming the dignitaries, institutions and the membership, Mr. P. Kaniappan, Chairman – Southern Region, ACMA mentioned that the event was a result of a structured effort to showcase the strengths of the academia to the decision makers of the automotive sector. A lot of talent and potential lay hidden in the engineering

institutions who may perhaps not be very well known and this platform was aimed at bringing to the fore the hidden talents and capabilities, he added.

Key products engineered by the institutes are here below:

Aarupadai Veedu Institute of Technology (AVIT), Chennai

- RAIN WIPER SENSOR
- PEDAL OPERATED MOBILE CHARGER
- PROTOTYPE OF COMPRESSED AIR ENGINE

Chennai Institute of Technology

- DEFECT ELIMINATION IN COLD FORGING OPERATION
- INDUSTRY FIRE SAFETY AND RESCUE ASSISTING SYSTEM

Dr. Mahalingam College of Engineering & Technology

- ENERGY CONSERVATION IN AUTOMOBILES BY OPTIMISING THE AIR
- BRAKE COMPRESSOR FUNCTION
- SELF-CHARGING BICYCLE

Kumaraguru College of Technology, Coimbatore

- DESIGN AND FABRICATION OF INTELLIGENT DOOR LOCKING SYSTEM
- DEVELOPMENT OF SPECIAL CAR SEAT FOR PHYSICALLY CHALLENGED PEOPLE

- DESIGN AND FABRICATION OF OFF TIME OPERATING SIGNAL BASED
- SPEED BREAKER ACTUATING MECHANISM

Mahendra Engineering Colleges, Namakkal Dist.

- TURNING HEADLIGHT PROJECTION SYSTEM
- CYBROG REGULATED VEHICLE

Rajalakshmi Engineering College, Chennai

-
- The magneto-rheological fluid damper
- Touch sensitive steering for the visually impaired
- Electric all-terrain vehicle
- Machine Vision systems enable automated end-of- line inspection and quality control
- DIE DAMAGE PREVENTION

Vel Tech Rangarajan Dr. Sagunthala R&D Institute of Science & Technology, Chennai

- DIGITAL FUEL METER USING IOT APPLICATION
- SKATIFY BAGS

ADD-ON FEATURES: -

1.Anti-theft alarm with GPS tracker
2.Water repellent bag
3.Inbuilt Mobile charging port
4.Bluetooth speaker

Over 150 visitors including the Executive Committee of ACMA, officials from Daimler, Hyundai and Ashok Leyland participated at this event and termed it an innovative effort by the Region for the industry.

The institutions appreciated the effort of ACMA for giving relevant exposure to the students and the faculty to understand better the challenges of the industry and align their approach. The visitors to the special exhibition and the EDII gave a very encouraging and positive feedback on this initiative of the Association.

WESTERN REGION

PROGRAM ON SECRET OF LEADERSHIP SUCCESS

ACMA Western Region organized one day training program on Secrets of Leadership Success on 1st February, 2018 at Nashik. The objective of the program was to understand the importance of leadership for profitable growth, discover current challenges as a leader, become familiar with the difference between management and leadership and identify new ways to improve team dynamics, gain better understanding on talent management.

The training was aimed for COOs, Plant Heads, Managers, R&D heads, Quality Heads, Technology Heads, Managers, Team Leaders, and Executives related to the subject.

Mr. Charudatta Bhave, Masters in Personnel Management and a corporate trainer in behavioral, leadership, team management & motivational trainings, was the faculty. He touched upon leadership styles such as Commanding, Democratic, Visionary. He also explained importance of situational leadership and Talent Management.

The training was highly interactive and participants found it enriching.

ONE DAY WORKSHOP ON RISK ASSESSMENT

ACMA Western Region organized the training program on Risk Assessment on February 8, 2018 at Bharat Gears Ltd., Mumbra Plant.

Mr. K Vishwanathan, Director, Inobest Technologies conducted the training.

Risk assessment is a new introduction in Quality Management System Standard. The new ISO 9001 as well as IATF 16949 standards calls for risk assessment of all the processes of organization that affect the Quality Management System. In this context the training was organised

The training content focused on risk assessment as required in ISO 9001 and IATF 16949. It covered product quality, delivery and new product development under clauses 6.1.1 and 6.1.2 of ISO 9001 and clause 6.1.2.1 of IATF 16949.

WORKSHOP ON BASICS OF HYDRAULIC & PNEUMATIC

Pneumatics is the transmission & control of forces & movements by means of compressed air. The use of compressed air as a medium to do work. In the Industry we use three methods for transmitting power from one point to another. Mechanical transmission is

through shafts, gears, chains, belts, etc. Electrical transmission is through wires, transformers etc. Fluid power is through liquids or gas in a confined space.

With this backdrop ACMA (Western Region) organised one day workshop on basics of hydraulic & pneumatic on February 13, 2018 at Pune.

Mr. Jayant Karandikar, Mechanical Engineer and postgraduate diploma in Quality Management Systems was the faculty. He touched upon Introduction to world of Control Systems, introduction to Hydraulics and Pneumatics, Introduction to components, Introduction to circuit design using components, Understanding design of hydraulic and pneumatic system.

3RD BEST PRACTICES COMPETITION

In order to recognize the efforts of the member companies in the field of Best Practices, ACMA Western Region organized the 3rd Edition of Best Practices Competition Gujarat Zone, on February 17, 2018 in Ahmedabad.

The Best Practices Competition was held under two categories namely LCA (Low Cost Automation) & Poka-Yoke. The presentations made by LCA teams focused on Safety, Quality, Cost & Delivery and the presentation made by Poka-Yoke teams focused on Safety, Quality and Cost.

17 teams and 9 delegates from component manufacturers having plant in Gujarat namely Badve Engineering Ltd., Delux Bearings Pvt. Ltd., Flometallic India Pvt Ltd., Gold Seal Saargummi Pvt. Ltd., MAHLE Behr India Pvt. Ltd., Minda Corporation Pvt. Ltd., New Swan Multitech Ltd., Precision Autowares Pvt. Ltd., Roki Minda Co. Pvt. Ltd., Schaeffler India Ltd., Sona Koyo Steering Systems Ltd., Supreme Treon Pvt. Ltd. and Yazaki India Pvt. Ltd. participated in the event.

The eminent panel of jury included Mr. R. Harishankar, Manager, FPS & Six Sigma from Ford India Pvt. Ltd., Sanand and Mr. Pankoj Bhattacharyya, DGM & Head-Central Maintenance Services from Tata Motors Ltd., Sanand.

The Chief Guest for the valedictory session, Mr. Neeraj Agarwal, Head, Tata Motors Ltd., Sanand Plant, congratulated ACMA for organizing such kind of event.

The following teams were announced winners.

UNDER LCA

Position	Team Name	Company Name
1st	Achievers	Gold Seal SaarGummi India Pvt. Ltd., Sanand
2nd	Dynamic Developers	Badve Engineering Ltd., Mandal
3rd	Udaan	New Swan Enterprises, Vithalapur

UNDER POKA-YOKE

Position	Team Name	Company Name
1st	Mars	Yazaki India Pvt Ltd, Bhayala
2nd	Fidelity	Flometallic India Pvt. Ltd., Bharuch
3rd	Excellence	Badve Engineering Ltd., Mandal

3rd BEST PRACTICES COMPETITION

ACMA Western Region organised the 3rd edition of Best Practices Competition on March 16, 2018 in Pune. The best Practices Competition was held under three category 1) Energy Conservation, 2) LCA (Low Cost Automation) and 3) Poka -Yoke .

The case study presentation made by companies focused on How to educe power consumption in moulding machines & utilities such as hillers and cooling systems, Cumulative savings from various projects, reduction in rejections, Creating more space by reducing the space occupied by the machines, In house machine design, Achieve Zero accident, Reduction in customer complaint, energy consumption reduction, use of new technology, safety improvement, quality improvement, Cost reduction, productivity improvement & delivery.

The Jury comprised of Mr. Hemant Kulkarni, Manager Paint Shop, Bajaj Auto, Mr. Lalit Mandhare , Advance Manufacturing Engineering, FIAT India and Mr. Nilesh Sonawane , (DGM (Low Cost tomation)_BES Mfg. Engg. Function.) , Tata Motors.

The 33 teams participated in the competition (12 under Energy Conservation, 12 under Poka-Yoke and 9 under LCA), following teams were announced winners :

Energy Conservation

Position	Team Name	Company Name
1st	Synergy	Minda Industries Ltd., Lighting Division, Pune
2nd	Udaan	Mahle Filters Systems (I) Pvt. Ltd., Pune
3rd	Knorr-Bremse	Knorr-Bremse Systems for Commercial Vehicles India Pvt. Ltd., Pune

LCA Category

Position	Team Name	Company Name
1st	Spartans	NRB Bearings Ltd., Aurangabad
2nd	Achievers	Badve Engineering Ltd., Pune
3rd	Phoenix	Mindarika Ltd., Pune

Poka – Yoke

Position	Team Name	Company Name
1st	Josh	Lumax Auto Technologies Ltd., Pune
2nd	Uddan	BSA Corporation Ltd., Pune
3rd	Yeshshree	Yeshshree Press Comps. Pvt. Ltd., Pune

ONE DAY TRAINING PROGRAM ON "VENDOR DEVELOPMENT"

- ACMA Western Region organized one day training program on vendor development on March 13, 2018 at Pune.
- Vendors are the backbone of suppliers. Every vendor has its strengths and weaknesses, and choosing the right one is a very critical task to optimize operational results. Understanding customer requirements is important in developing any product. In automobile sector words like, Customer, Competition, Quality, Cost, Delivery, are very much familiar. These words literally drive all of us.

- The program aimed for owners and vendor development engineers from Tier 1, 2 suppliers with the objective to have better understanding about vendor operations, strategize and planning, vendor development function and performance evaluations.
- The program was conducted by Mr. Satish Inamdar, Ex-Tata Motors. Explaining IATF Clause No. 8.4.2.5 on Supplier development, Mr. Inamdar mentioned organization should determine the priority, type, extent, and timing of required supplier development actions for its active suppliers. Determination inputs shall include performance issues identified through supplier monitoring, Second-party audit findings, third-party quality management system certification status and Risk analysis.
- Mr. Satish Inamdar mentioned that the aim of vendor development is to reduce costs, streamline operations and minimise defective products.

2nd 5S COMPETITION

ACMA Western region with support from OEMs, organized the 2nd edition of 5S Competition at Pune on March 16, 2108. The competition had three stages a)Application, b)Site assessment and final presentation. Tata Motors, Mahindra & Mahindra, Bajaj Auto, Volvo Eicher extended support in conducting site assessments and nominated Jury for the competition as well.

The entire exercise from inviting applications till final presentation was spread over four months from 16 December 2017 to 16th March 2018. Out of 29 applicants, 20 were selected for site assessment and 10 for the final presentation.

The focus area for site assessment was Office, Store and Shop floor. Mr. R J Pise, Vice President, Bajaj Auto Ltd., Pune was the Chief Guest at the valedictory session.

Following were announced winners :

Position	Company Name
1st	BSA Corporation Ltd., Pune
2nd	Polyplastics Industries India Pvt. Ltd., Unit-1, Pune
3rd	S. M. Auto Engineering Pvt. Ltd., Pune

Members appreciated the efforts made by ACMA Western Region and the feedback was excellent.

ACMA
Automotive Component Manufacturers Association of India

INDIAN AUTOMOTIVE AFTERMARKET STUDY- 2017

Highlights

Overview
- Vehicle Parc Analysis
- Automotive Component Aftermarket Potential

Comparing Automotive Growth Economies
USA, China, Japan

Vehicle Parc
Segment - wise | State - wise
District - wise

Automotive Aftermarket in India
- Market size constituencies and geographies
- Replacement frequency: segment-wise, city - wise, state-wise, district-wise
- Distribution and retail Channels
- Aftermarket Automotive Imports

Emerging Trends: Automotive Industry and Aftermarket
- Trends for automotive aftermarket in India
  - vehicle telematics
  - vehicle servicing
  - e-tailing for auto components
  - alternate fuels and vehicle technologies
  - supply chain efficiency
  - impact of IT and systems

The Pre-owed Car Market
- Sales Channel Analysis
- Impact on Component Manufacturers

The Taxi Market
- Taxi Parc and Type
- Sales Channel Analysis

Impact of Regulations
- Safety, Emissions and Noise

Government Initiatives
- Impact of GST in supply chain efficiency
- NATRiP

Country Reports
- Bangladesh, Nepal, Sri Lanka: Automotive and Aftermarket Overview

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Enriched with data, the study gives complete profile of Indian Automotive Aftermarket with market insights particularly required by Aftermarket managers for strategic and operational decision making.

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