

ACMA

Automotive Component Manufacturers Association of India

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AUTONEWS

Vol 9 No 60



inside

“With world-class quality practices and manufacturing capabilities, the auto components industry in India is well poised to partner with the Defence Sector”

SHRI MANOHAR PARRIKAR, DEFENCE MINISTER @ THE 2ND ACMA AEROSPACE DEFENCE SUMMIT

ACMA'S BUYERS-SELLERS BUSINESS MEET, DRAWS FOCUS ON NEW TECHNOLOGIES

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EDITOR'S NOTE

ACMA had invited Mr Guenter Butschek, the newly appointed Managing Director & CEO of Tata Motors, for an interactive session with its Executive Committee as also to inaugurate the 3rd ACMA Buyers Sellers meet in Ahmedabad on May 26, 2016. Mr Gunter shared his vision of transformation for Tata Motors and reinvigorating its products to become world-class. While thanking the component industry for its support, he also advised the component industry to become agile and flexible and focus on new technology development, especially in light of changing regulations on the front of safety and emissions.

At the ACMA Buyers Sellers Meet in Ahmedabad, over 55 component suppliers displayed their state-of-the-art products, while several heads of purchasing from OEMs, Tier-1/2/3 and IPOs from all over the country visited the exhibition and interacted with the exhibitors.

Besides this ACMA also organised the high-powered 2nd Aerospace & Defence Summit on May 15, 2016 in New Delhi with Raksha Mantri, Mr Manohar Parrikar as the Chief Guest. Luminaries from leading global Aerospace and Defence sector addressed the Summit, while over 100 focussed participants made it a premier business event. The vast opportunities offered by the Aerospace and Defence Sector can be an inflection point in the growth for the auto component industry in India, which is one of its closest adjacency.

With this issue we bring to you an interview of Mr Guenter Butschek, Managing Director & CEO on his transformational agenda for Tata Motors as also reports on various ACMA initiatives from across the regions.

As always we request you for your feedback on the Auto News.

Vinnie Mehta
Director General, ACMA
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ACMA AUTONEWS

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GUENTER BUTSCHEK WANTS TO REPOSITION TATA MOTORS BRAND IMAGE



In an interview, Tata Motors CEO and MD Guenter Butschek spoke about the company's passion to improve, recasting products, and aspiration of becoming a global company

Putting Tata Motors Ltd back on track is not a task for the faint-hearted. The company that once attracted much attention for its small car Nano and its acquisition of Jaguar and Land Rover (JLR) is struggling. The Nano never picked up and JLR is facing headwinds due to a slowdown in China. Tata Motors has lost focus on its domestic car business and has become a fringe player. Guenter Butschek, the 55-year-old veteran of automobile and aviation industries, has taken up the responsibility to revive the company. His track record at Daimler-Benz AG and Airbus SAS suggests, he could be the right man for the job.

In an interview, he spoke about company's inner passion to improve, recasting and reinvigorating Tata Motors' products, and aspiration of becoming a global company.

Excerpts from Live Mint:

It's been two months since you took charge at Tata Motors. What are the initial impressions that you get from your meetings with dealers, suppliers and staff?

Tata Motors is a company that takes great pride in its history and there is a general feeling in the people—the employees, dealers and suppliers—that Tata Motors should do well. This is a very unique strength to possess which backs you up during tough times and helps you come back stronger. There is an inner passion to improve, at the core of each individual associated with Tata Motors.

We need to take the positive energy within the company in the

right direction to make sure there is engagement with purpose and I am confident this will result in new horizons for Tata Motors. Three key elements that we will be focusing on—highest product quality standards, expressive and exciting new design and technology innovations (for instance, fuel-efficient powertrains, best-in-class connectivity, etc.)—we can see all of these reflected in the Tiago. You must be aware that despite serious steps being taken, both at the engineering as well as the sales fronts, passenger vehicle sales of the company have not really picked up. According to you, what is ailing Tata Motors?

2015 has been a year which saw multiple new product launches from Tata Motors' passenger vehicle business unit. There is a lot of positive buzz created on social media—thanks to our marketing campaigns and field activities. Quality levels and craftsmanship of our cars have improved and we are recalibrating our targets with reference to global benchmarks.

We did lose some of the momentum in the second half of the year, but we have a great product pipeline ahead, as seen in the response to our cars at the recent Auto Expo. What's going to be the key is that we now take this robust product pipeline to the market and reposition our brand image in the minds of customers. Sometimes, it takes years to change the consumer perception about your brand and products. We have done the hard work in terms of reinvigorating and recasting Tata Motors' products with closer eye on customer preferences. Now, we are getting ready to put the pedal to the metal to deliver to our commitments and expectations—and I would like to exceed those expectations.

What's your outlook for commercial vehicle (CV) sales?

Tata Motors is the market leader in CV in terms of market share and revenue. We may have lost some market share in certain segments, but with our highly competitive and comprehensive product portfolio, wide sales and service network, segment-leading technologies, we are confident of bouncing back stronger. As the market leader, Tata Motors has regularly redefined the CV industry. We remain the only company to offer end-to-end people and cargo transport solutions matched with ever-improving products and service quality coming from a sharp customer focus. This holistic package is what differentiates us to make the market leader.

The last couple of years were among the most challenging for the commercial vehicles industry in India but we are beginning to see the cycle turn back. We have seen sustained M&HCV (medium and heavy commercial vehicles) growth in the last few quarters, majorly from replacement as well as new demand. The growth is primarily due to economic recovery, improving viability due to decline in diesel prices. We have already started seeing the return of growth in this segment, albeit on a low base. Though we are

quite active in international market in CV, we still have more ground to cover.

Key government policy interventions, improvements in macroeconomic trends, especially speedy growth in infrastructural projects and a good overall consumer sentiment, will be necessary to see a real and comprehensive turnaround in the CV industry, especially in the SCV/LCV (small and light CV) segments that are yet to return to their true potential.

As compared with your previous assignments at Airbus and Daimler, Tata Motors remains a very small company (excluding Jaguar Land Rover). What prompted you to take up this job?

Tata Motors brings with itself a powerful association on shared values inherited by its people, the Tata group's brand and its international presence. What stands out as very unique and compelling is the contribution of Tata Motors to India; in terms of enabling mobility in this country, transport solutions and overall industry development. Tata's very strong commitment to its people and to the community, connects to my basic convictions that if you would like to make a difference to an organization, the difference is going to be made by its people.

So, I thought, I could bring my passion and experience to make a difference by taking the company to a completely different level. I am delighted to be part of Tata Motors and have serious faith in its capabilities for the future.

At the Geneva Motor Show, you told one of the editors that you plan to use your Airbus experience to 'make Tata Motors fly'. Could you please explain learning, practices that you plan to bring to the table from Airbus?

With my past experience, I would like to bring the global exposure into Tata Motors' systems, process redesign, product strategy, organizational transformation to strengthen the current operations. We will look to establish a global footprint and it is imperative we therefore evaluate ourselves with respect to global benchmarks on everything we do—from R&D, operations to sales and service customer experience. This would play a significant role in the holistic transformation to make the company future-ready.

Tata Motors expanded too soon too fast in certain markets such as Indonesia, South Africa, etc. How do you plan to rationalize the firm's overseas operations?

We have a unique position with our brand portfolio, partner relationships, right sales and service support network, which we will leverage to provide the most capable high-end products to meet varying customer demands, across the globe. We will review our current footprint in terms of products, network, customer experience. This is a work in progress and we have not reached any conclusion yet. We have made some good start with our products in some of the Asean (Association of Southeast Asian Nations) and African countries and we will build upon this platform to develop a more holistic implementation plan.

Capacity utilization of the firm in the passenger vehicle (PV) segment stands at 33%. The Indian operation needs to find

ways to utilize idle capacity in order to become profitable. In this context, what are your export plans?

Capacity utilization is a result of volume performance. Unfortunately, we have not been able to realize the true potential with our current PV portfolio. While the much-needed hype is created, sales numbers need to materialize now. Internally, we have implemented strategic actions such as producing different vehicle models on flexible manufacturing lines, which will improve utilization levels and lead to better operational efficiencies.

Additionally, we are exploring potential markets and latent demand that may exist for our products internationally. Global expansion will be a key aspect of our business strategy as that will de-risk our performance from the cyclic nature of domestic business.

There remains a big question mark on the future of Nano. Indian consumers and the government have started to demand stricter safety and emission norms. These norms are likely to make cars more expensive. In the backdrop of such developments, what is its future? Will these norms actually provide you more room to do different things with Nano in terms of shape and size?

The Nano was a visionary and ground-breaking decision that changed the passenger vehicle business in the Indian market. It set a different pace and created a new segment, and was the result of strong commitment by Tata Motors and Mr. Ratan Tata and his vision to mobility. The Nano is a testimony to our commitment to mobility solutions.

While sales have not been at par with our initial expectations, we are very much in line with the segmentation of the market. The Nano provides a solution for individual mobility even below the entry segment.

We are reviewing our product strategy and the Nano will play a critical role in the future.



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INTERNATIONAL EVENTS ::

7th Thailand Auto Parts & Accessories Fair (TAPA) 2016

ACMA with the support from Ministry of Commerce, Government of India participated at the 7th Thailand Auto Parts & Accessories 2016 (TAPA) from April 7th to 10th 2016 at Bangkok International Trade & Exhibition, Centre (BITEC), Thailand.

TAPA 2016 is considered to be one of the largest auto parts and accessories trade fair in Thailand. The show featured 576 exhibitors from Thailand, Taiwan, India, China, Malaysia, South Korea and attracted over 5000 trade visitors over the fair days.

Nine member companies of ACMA participated at the exhibition; Sansera Engineering, Valeo Friction, QH Talbros, Indication Instruments, Besmak Components, Brakewel, Linamar, Kalisma Fasteners, Talbros Automotive Components and Star Automotive. The ACMA India Pavilion was inaugurated by Indian Ambassador in Thailand H.E. Mr Bhagwant Bishnoi, Mr Naveen Saxena, First Secretary and Mr Sompol Tanadumrongsak, Vice President-TAPMA (Thailand Autoparts Manufacturers Association).

The participants met and interacted with members of India-Thai Chamber of Commerce at the interaction hosted by NRB Bearings Thailand, wherein LMC Consultants also shared their insights on Thailand Automotive Industry. While the overall feedback by members was encouraging.



ACMA joint stand participation at Automechanika Dubai



ACMA Pavilion inaugurated by Mr. Anurag Bhushan, Consul General Consulate General of India in Dubai.

The recently concluded 15th edition of Automechanika Dubai 2016, May 8-10, 2016, featured 2,017 exhibitors from 58 countries and welcomed more than 30,000 trade visitors from across the globe. Organised by Messe Frankfurt Middle East, Automechanika Dubai featured 25 country pavilions, and 38 international trade associations. Spanning 70,000 sqm across 15 halls, the event grew at 8% year-on-year in both exhibitor numbers and exhibition space. Among the country pavilions the first time participations were from Iran, Japan, The Netherlands and Peru.

The three day event held at the Dubai International Convention and Exhibition Centre, was inaugurated by Mattar Al Tayer, Director General and Chairman of the board of Executive Directors at the Roads and Transport Authority (RTA).

According to figures released by Dubai Customs during the show, Dubai's trade for auto parts and accessories was valued at AED 40.46 billion in 2015, comprising 3.3 per cent of the Emirate's AED 1.28 trillion total general trade for the year.

Looking at this growing potential ACMA placed a joint stand at the show with the assistance from Ministry of Commerce, Government of India. The joint stand was located in Hall 2, with 56 ACMA member companies in a total display area of 500 sq.mts (app).

The exhibiting members received business visitors out of which three exhibitors received confirmed order of USD 3.5 mln and 6 participants received business enquiries amounting USD 3.3 mln. The visitors to the ACMA Joint Stand included business people mainly from South America, South East Asia, USA, Middle East/Gulf, China, Africa, Canada, Algeria, Morocco, Iran, Mexico,

South East Asia, West Europe and Pakistan. The overall assessment of exhibitors with regard to their participation with ACMA, was good and most of the participants expressed their willingness to participate at the next show. Participating members appreciated the stand design and other services extended by ACMA.



Automechanika Istanbul

The Indian auto component industry reiterated its focus and commitment to the Turkish automotive sector through ACMA's joint stand participation at the Automechanika Show in Istanbul, held from April 7-10, 2016.

Ten Indian companies comprising a mix of small, medium and large companies displayed their engineering and marketing capabilities at the show. The Turkish automotive market has seen a growth in sourcing of automotive parts from India which saw over 37% growth over last year:

INDIA EXPORT STATISTICS

Commodity: International HS Codes 6 Digits
Year Ending: March

Partner Country	United States Dollars (Mln)			% Share			% Change 2015/14
	2013	2014	2015	2013	2014	2015	
Turkey	344.78	530.54	731.35	3.36	4.85	5.98	37.85

Source: Ministry of Commerce

The India Pavilion with the funding support from the Ministry of Commerce was located in Hall 6 that saw a continuous flow of visitors from the OE, Aftermarket and importers.

Over 350 quality business visitors from Turkey, Germany, France, UK, USA, UAE, Iran, Ivory Coast, Algeria, Nigeria, Poland, South America, China, etc visited the Indian pavilion. OEMs like Renault-Nissan, Istanbul Fiat Automotive also visited the ACMA-India Pavilion and interacted with the member companies.

Mr. Sanjay Jain, Consul/HOC, Consulate General of India along with Mr. Amar Singh, Vice Consul (Commerce) also visited the Indian pavilion and interacted with the companies at the ACMA India Pavilion. During the interaction the officials also gave tips on the Turkish market. They suggested the Indian industry to aggressively market their capabilities and products to the Turkish industry as there were possible areas of mutual cooperation that could be explored.

An initial analysis of the outcome of participation suggests that approximately USD100 million worth of business was generated and more enquiries are likely to get converted to potential business order in due course. All companies expressed their desire to be part of the ACMA India Pavilion and requested ACMA to continue focusing the Turkish market which has the potential to grow. Members requested ACMA to ask the Government of India to extend the funding support for the next few years to assist the Indian industry aggressively promote the "Make in India" brand and also tap the Turkish market which is also a gateway for exports to EU, CIS, Africas and the South American market.





ACMA Aerospace Mission to U.K.

Indian aerospace industry today is on the threshold of entering into a new era where it will assume greater responsibility in making the nation self-reliant in Civil & Defence aerospace production. The resurgence of India's manufacturing sector has been remarkable and not only are the profits soaring, the sector is also making its presence felt abroad as many Indian firms are becoming transnational companies. To understand the dynamics of a well-developed aerospace industry, ACMA organized its first mission to U.K. with the support of UK Trade and Investment (UKTI) from February 29 to March 4, 2016. The delegation of 19 members from 18 companies was led by Mr. F. R. Singhvi, Chairman, ADR Committee of ACMA.

The broad objectives of the mission was:

- To understand the dynamics of U.K.'s Aerospace industry
- Witness best manufacturing practices as well as visit Centres of Excellence for learning & best practices
- Explore Business Opportunities, JVs/Collaborations/Strategic alliances with Aerospace OEMs, Tier 1 and Tier 2s.

The Indian aerospace industry is one of the fastest-growing markets in the world, the rapid growth of this industry has attracted major global aerospace companies to India. All segments in the aerospace industry, including civil and military aviation and space, are showing a significant level of growth.

ACMA member's database along with the profile of 52 companies interested in venturing into aerospace sector was shared at all the interactions.

A networking session with ADS & FAC, Farnborough was organized where Mr. F. R. Singhvi, Chairman, ADR Committee, ACMA made a detailed presentation on the Indian Auto Component Industry – Exploring Opportunities in Aerospace Industry. Thereafter the delegation met resellers of aerospace parts to both Indian & overseas customers and MRO firms looking for suppliers who have reverse engineering capability.

During four days, the delegation visited University of South Wales Aerospace Centre, TWI Technology Centre, Port Talbot, a well known welding institute, research center and pioneer's in ultrasonic technology and constantly innovates new techniques in

Aerospace, Oil & Gas, deep earth excavation, automobile industry, etc. and Surface Finishing Engineering, Wolverhampton that develop specialised chambers for aerospace coating requirements. A networking session was organised at Midlands and a presentation was made by the Nasmyth Group, which provides the global aerospace, defence, energy, automotive, marine and medical industries with world class precision engineering and logistical solutions.

The delegation also visited Millbrook, testing facility in Bedford which is an independent vehicle testing facilities in UK. They test all new vehicles, programs and provide certification. They cater onto ride & refinement, reduce emissions, technology cluster, specialty vehicle regulatory compliances, testing and engineering, safety & reliability, etc., Manufacturing Technology Centre (MTC), Coventry that develops and proves innovative manufacturing processes and technologies in an agile, low risk environment, in partnership with industry, academia and other institutions, Airbus facility in Broughton that assembles wings for all Airbus civil aircraft, including the new A350 XWB, AMRC Group in Sheffield, Rolls Royce, Derby, that designs, develops, manufactures and services integrated power systems for use in the air, on land and at sea. They are one of the world's leading producers of aero engines for large civil aircraft and corporate jets and are the second largest provider of defence aero engines and services in the world.

The visiting delegates found that U.K. offers significant opportunities to the Indian Auto Component Manufacturers who are looking to venture in this new terrain. The overall feedback of the Mission delegates on the visit and the interactions was positive. The delegation provided an excellent opportunity to the members to not only learn about the new manufacturing technology during the formal and informal interactions but also make key business contacts.





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NATIONAL COMMITTEES ::

AEROSPACE & DEFENCE COMMITTEE

“INDIAN AUTO COMPONENT INDUSTRY – MAKE IN INDIA FOR AEROSPACE & DEFENCE” - 2ND ACMA AEROSPACE & DEFENCE SUMMIT

India has the potential to emerge as a global platform for Aerospace & Defence research, manufacturing, supply chain sourcing, software development, and offsets, which will strengthen the auto components sector capabilities in Aerospace & Defence sector.



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

All these factors make the Indian defence and aerospace one of the most attractive market globally and provides an immense opportunity for both domestic and foreign players. Keeping this in mind the ACMA – ADR Committee organised the 2nd Aerospace & Defence Summit on 14th May, 2016 at Hotel Le Meridien, New Delhi.

Mr. F R Singhvi, Chairman – ACMA ADR Committee & Joint Managing Director Sansera Engg. Pvt. Ltd. welcomed the Chief Guest, Panellists & Delegates. Mr Singhvi briefed about ACMA activities in Aerospace & Defence sector and put forth his views on way forward on the MSMEs participation at “Make in India” initiative which includes skill development programs, review of procurement policies of DPSUs.

Further, MoD has been able to meet one-hundred per cent of defence offset obligation last year, and has set a target for achieving USD 2 billion worth of exports through offset in the next two years. With world-class quality practices and manufacturing



capabilities, the auto component industry in India is best poised to partner with the Defence Sector to achieve this goal.

The summit also included eminent speakers and experts from the Aerospace & Defence Industry namely Mr. Kishore Jayaraman – Rolls Royce, Mr. Ashish Saraf – Airbus, Maj. Gen. S Bhattacharya – Directorate General of EME, Indian Army, Mr. Jagmohan Singh – Lockheed Martin, Mr. Vineet Khunger – SAAB Technologies, Mr. Arvind Melligri – Aequs India. The experts shared their perspectives on how the auto component industry could gear-up for the aerospace & defence sector.

Over 100 participants attended the summit who appreciated the views of industry doyens who highlighted the opportunities, challenges and key areas that require government interventions.





"I am delighted that we have been able to meet one-hundred per cent of defence offset obligation last year, and I am setting a target for achieving USD 2 billion worth of exports through offset in the next two years. With world-class quality practices and manufacturing capabilities, the auto components industry in India is well poised to partner with the Defence Sector to achieve this goal. The government will also create the necessary framework by June 2016, to reform purchasing processes of Defence PSUs, which would benefit all suppliers, especially the MSMEs. This will help realise the Government's vision of Make in India for the Defence sector."

Shri. Manohar Parrikar,
Hon'ble Raksha Mantri, Ministry of Defence



"The time is ripe for the auto component industry to amplify its defence production capabilities. Joint efforts between the auto component industry and Ministry of Defence can help enhance India's self-reliance and conserve foreign exchange. The positive approach displayed by the government, including liberalisation of FDI norms in the defence sector and clearer licencing requirements, will provide a thrust to the domestic manufacturing."

Mr FR Sighvi,
Chairman,
ACMA Aerospace,
Defence & Railways Committee



"Make In India" initiative should also include "Ethical India".

Maj. Gen. Soumitra Bhattacharya (VSM)
Additional Director General,
Directorate General of EME, Indian Army



"The vast opportunities offered by the Aerospace and Defence Sector can be an inflection point in the growth for the auto component industry in India. The Indian Auto Component industry is well poised to meet the requirements of the global players in this sector who have set up a manufacturing base in the country."

Mr. Vinnie Mehta,
Director General, ACMA



"In Aerospace sector there are no short term returns, and one should be prepared for long & strenuous process for venturing into this sector."

Mr. Ashish Saraf,
Vice-President - Industry Development,
Strategic Partnerships & Offsets
Airbus Group



"The prerequisites for a supplier to foray in the aerospace sector is to embrace zero defect culture, customer centricity, improve relationship between suppliers and OEMs & take on challenges head on."

Mr. Jagmohan Singh,
Regional Director - India,
Sri Lanka and Maldives,
Lockheed Martin India Pvt. Ltd.



"The Indian auto component sector can be considered as a natural partner for the OEMs in Aerospace industry because of its excellent engineering capabilities and manpower."

Mr Vineet Khunger,
Marketing Director, SAAB Technologies



"The country has gradually been able to successfully build a thriving ecosystem in the Aerospace and Defence sector. But the key to be successful is to strategise the journey one intends to make; delivering quality remains the key ingredient to remain competitive to move up the value chain."

Mr. Aravind Melligeri,
Chairman & CEO,
Aequs India



"To develop an aerospace supply ecosystem in India one cannot expect it to happen organically but requires integration of adjacencies."

Mr Kishore Jayaraman,
President, Rolls-Royce South Asia

GLOBALISATION COMMITTEE

GLOBAL AUTOMOTIVE ROUNDTABLE: MEETING OF COUNTERPART ASSOCIATIONS FROM ACROSS THE WORLD



ACMA, on the side lines of 13th Auto Expo Components show, organised a meeting of its counterpart MoU Partners on February 5, 2016. The meeting was organised with the intent of forging better ties across the industry value chain and also provide a networking platform for leaders from auto / auto component associations from across the globe.

This meeting witnessed participation from associations of around 8 countries.

After a brief round of introduction from each representative the meeting started with a presentation by Mr. Vinnie Mehta, Director General, ACMA on Indian Automotive Industry: Growing Opportunities and Challenges.

Mr. Mehta explained the objective of the forum which is to discuss challenges faced at the association level and also discuss areas of future collaboration. After the presentation, the representatives were requested to brief the members present at the round table on the best practices and challenges faced by each association.

Members at the round table appreciated ACMA's efforts for organising such an event and were of the opinion that such meetings should indeed become an annual event. It was also discussed that there is a need to identify key areas of mutual interest at the association level.

It was then mutually decided to hold the next meeting during the AAPEX Show which will be held in Las Vegas, USA in November 2016.

WORKSHOP ON AFTERMARKET OPPORTUNITIES & MARKET DYNAMICS IN LATAM & AFRICA

ACMA appointed Frost and Sullivan as its knowledge partner to conduct a study on the potential opportunities in Global



In Delhi

Automotive Aftermarket. A detailed analysis on the aftermarket opportunity was conducted on 20 countries covering Africa, Latin America and the CIS region, across passenger cars, commercial vehicles, 2 wheelers, 3 wheelers and tractor segments. The estimated market opportunity in these identified countries is to the tune of USD 41.6 billion. Further, in the second phase of the study, 6 of these 20 countries namely, Colombia, Mexico and Panama in the Latin America, and, Algeria, Nigeria and Kenya in Africa, were selected for a detailed analysis.

The study has brought to light interesting nuances of each of these aftermarkets, shedding light on the key opportunity segments, the current business trends, and the key challenges to overcome.

In order to dwell upon the latent opportunities in the emerging economies, ACMA organized a workshops where senior leadership from M/s Frost & Sullivan (including their overseas team) presented the findings of their deep dive analysis on the select markets, followed by brainstorming sessions and group activities. The workshop was held in New Delhi on May 4, 2016 and in Chennai on May 6, 2016. The workshop saw participation from around 35 and 17 ACMA members in New Delhi and Chennai respectively.

At the Delhi seminar, Mr. Rakesh Kher, Member-Aftermarket Sub Committee, ACMA & President, Minda Industries Ltd., emphasized on the current business trends, key challenges to overcome and necessary strategy required for the next 3 years to



industry. A study was conducted to understand the key trends in global aftermarket, to understand the market dynamics and identify opportunities for industry participants. The study analysed 20 countries based on aftermarket potential and 6 countries were shortlisted for deep dive analysis based on relevance in terms of aftermarket opportunities. The countries shortlisted were Algeria, Nigeria, Kenya, Mexico, Columbia & Panama

Ms. Lorena Isla, Director, Frost and Sullivan, Mexico presented to the participants the unique trends in the LATAM markets. Her presentation to members also consisted on auto component market size, perception of Indian auto components and recommendations for ACMA members, automotive industry overview. A workshop was conducted by dividing the participants into 4 groups where they were asked to create a strategy to enter LATAM.

Mr. Collin Noronha, Lead Consultant, Frost and Sullivan presented to the participants the unique trends in the African markets. His presentation to members also consisted on Auto component market size, perception of Indian auto components and recommendations for ACMA members, automotive industry overview. A similar workshop was conducted by dividing the participants into 4 groups and were asked to create a strategy to enter African market on the basis of brand building and marketing.

Both the group exercises were appreciated by members that were moderated by the Frost and Sullivan team. The workshop gave an opportunity to ACMA members to deliberate in groups and arrive at the best strategy to enter these markets as well as cross learning among groups.

HR & IR SKILL DEVELOPMENT COMMITTEE

VISIT TO SONA SKILL DEVELOPMENT CENTRE

Northern Region HR Forum organized a visit to Sona Skill Development Centre (SSDC), Gurgaon on 19th May, 2016 with an objective to develop a framework of standards, curriculum and quality assurance in skill development, to support private sector in skill development and subsidize training cost through government subsidies act and to conduct research and analysis, to establish skill gaps & develop modular courses.

Presentations were made by SSDC and Sansera Engineering on Automotive Skills Development Council (ASDC) affiliated Training Centre. Both the presentations were focused and made members aware about ASDC and the benefits of establishing the training centres within their own premises. 39 members cleared their queries during Question & Answer Session after both the presentations. Excellent feedback shared by the participants.

develop the industry.

Mr. Kaushik Madhavan, Director - Mobility - Middle East, North Africa & South Asia, Frost & Sullivan presented market dimension and addressable opportunities in the global auto components & aftermarket industry.

At Chennai, Ms Shuba Kumar, Executive Committee member, ACMA & Director, Natesan Synchrocones Pvt Ltd welcomed the participants and Frost and Sullivan team. She explained the participants about the aftermarket study which has evaluated 20 countries covering Africa, Latin America and the CIS region, across passenger cars, commercial vehicles, 2 wheelers, 3 wheelers and tractor segments which could be potential markets for the Indian auto component industry to tap. The estimated market opportunity in these identified countries is to the tune of USD 41.6 billion.

Mr S Balasubramanian, Executive Director, ACMA in his presentation on Market Dimension and addressable opportunities gave a perspective on Global Auto Components & Aftermarket



RAW MATERIAL COMMITTEE**PLANT VISIT TO TATA STEEL**

Tata Steel commissioned a new continuous annealing unit at their Jamshedpur plant. The company is also on an expansion mode through its Kalinganagar unit which has dedicated a major share for the automotive sector. To update the membership on these developments and also to discuss on procurement related matters ACMA's Raw material committee organised a 13 member delegation to Tata Steel, Jamshedpur from April 12-13, 2016. The team was received by Mr Ish Mohan Garg, Chief Marketing, Tata Steel.



The delegation visited the LD3 TSCR steel melting shop for flat products. It integrates a Thin Slab Caster and a Rolling mill (new energy efficient Compact Strip Processing technology) with the upstream LD3 steel making facility.

This was followed by a visit to the new Continuous Annealing and Processing Line with sophisticated processing techniques that have drastically reduced lead times and received wider customer acceptability from around 10 OEMs including Mahindra, Tata Motors, Renault Nissan, Honda (of late Suzuki also) and also the Tier 1s.

Tata Steel team also showed the delegation testing facilities at their Research and Development Centre. The tools and equipment shown included machines to test welding and to understand mechanical strains in end products.

ACMA members also had some very useful interactions on their company specific issues and on the future plans of Tata Steel.

At Kalinganagar facility, Tata Steel commissioned a 3 million tonne steel output that produces high-tensile steels and flat products with more than 40 percent market share for the automotive sector.

**IT COMMITTEE ACTIVITIES****autoDX UPDATE**

Goods and Service Tax Network (GSTN) which has been set up as a non-government not for profit company to provide shared IT infrastructure and services to Central and State Governments, 6.5 million tax payers and other stakeholders for implementation of Goods and Service Tax (GST). GST is likely to get rolled out soon.

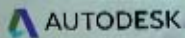
The autoDX team met with GST Network to understand the role, effect and impact of GST on manufacturing when rolled-out. The team also wanted to explore opportunities to work together on the autoDX platform as GSTN is also working on a similar platforms of data exchange with other industries.

The GSTN team was keen to understand autoDX and appreciated the efforts of SIAM and ACMA in putting-up autoDX for the industry. They have expressed their interest in working with the autoDX team as they feel that this model will benefit other industries as well.

An autoDX-GSTN group will be formed to take things forward.

AHMEDABAD BUYERS-SELLERS BUSINESS MEET

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ACMA's Buyers-Sellers Business Meet, Draws Focus on New Technologies

OVER 55 EXHIBITORS DISPLAYED TRENDSETTING PRODUCTS & TECHNOLOGIES EXPLORING BUSINESS OPPORTUNITIES

ACMA's Supply chain committee, organised a two-days Buyers-Sellers meet in Ahmedabad on May 26, 2016, with an objective to enhance business linkages in Gujarat and develop the automotive supply chain.

Over the years Gujarat has emerged as a global automotive hub for vehicle and auto component manufacturers. Eminent OEMs such as Tata Motors, Maruti Suzuki, Ford India, HMSI, Atul Auto, Hino Motors, Mahindra Gujrat Tractor have set up their manufacturing plants in the state while others are in the process. At the Buyers-Sellers meet over 55 component suppliers displayed their state-of-the-art products, while several heads of purchasing from OEMs, Tier-1/2/3 and IPOs from all over the country visited the exhibition and interacted with the exhibitors.

Speaking on the occasion, Chief Guest Mr Gunter Butschek, CEO and Managing Director of Tata Motors, said, "The need of the hour is to deepen engagement with the auto component suppliers and improve the efficiency across the automotive value chain. The prerequisite of this journey is to create more accountability among the suppliers. We welcome the approach of the component players who wish to move up the value chain, from the build to print to art to part, bringing solutions and in turn creating IP."

Mr Arvind Balaji, President ACMA said, "We are at an inflection point, the industry is expected to grow from existing USD 38.5 billion to USD 200 billion by 2026. This would require an incremental investment of USD 30 billion. This also calls for strengthening our capabilities for new product development, improving quality standards, evolving our technology for meeting the evolving needs of the industry on environment and safety."

"We at ACMA believe that this meet not only highlights Gujarat as the investment destination, but also promotes Gujarat as a platform for business networking with entire India. We are confident that engagements like these will scale-up business goals of the auto component industry," added Balaji.

Speaking on the positive response at the meet in Ahmedabad, Mr Rattan Kapur, Vice President ACMA & Chairman Supply Chain Committee said, "We at ACMA strongly believe that this platform is a great opportunity for participants to showcase not only their strengths and capabilities to OEMs and Tier1 companies through product display but also provided a unique opportunity to interact directly with the those responsible for sourcing. Auto component Tier-2/3 companies are still one of the weakest links in the entire supply chain. To make the entire value chain work seamlessly, there is an urgent need for upgrading the T2/T3 suppliers".



FROM THE REGIONS

EASTERN REGION

ONE DAY WORKSHOP ON KAIZEN

ACMA Eastern Region, organised a workshop on Kaizen on April 22, 2016. The faculty for the workshop was Mr. Pankaj Kumar Saraswat, General Manager & Black Belt, Six Sigma at Tata Cummins Ltd., Jamshedpur. The workshop was attended by thirty five delegates.



The objective of the workshop was to make the delegates understand the potential of their team member's and optimize their strengths. Mr. Saraswat gave a background about Kaizen and explained the key principles of Kaizen that are:

- Motivate people to do improvements.
- Strive for better productivity, quality, safety, cost reduction through continuous improvement.
- Involve people in improvement, to develop ownership
- Talent utilization and horizontal deployment of ideas.
- Recognition and Motivation for employee
- Promote team work to create Clean, Safe and Great place to work.

ACMA Eastern Region organised the second workshop on Kaizen on May 9, 2016 in Jamshedpur, where Mr. Ashish Tripathi was the faculty. He discussed Pareto charts, why-why analysis and Fault tree analysis at great lengths.



The workshop was attended by 32 delegates.

NORTHERN REGION

ONE DAY TRAINING PROGRAM ON COST OF POOR QUALITY (COPQ)

ACMA Northern Region organised a training program for its members of Delhi NCR zone, on Cost of Poor Quality (COPQ) on 12th April, 2016.



The Cost of Poor Quality (COPQ) is the aggregate impact of an organization's errors and defects on the company. It includes costs associated with scrap, rework, inspection, data management, data collection, redesign, warranty claims, lawsuits, lost sales, loss of reputation, additional inventory, and any other expense that is incurred to make sure customers are not stuck with products that don't work. Most organizations have a tendency to focus on the initial or visible 2%-4% of total cost (waste, rework, inspection costs, etc.). What is not evident, but crucial is that the rest 10-20% of the hidden cost is not visible. So what most of the companies monitor is just the Tip of the Iceberg. The objective of this program was to understand the impact of measuring the Cost of Poor Quality, identify the quality costs in an organization and understand the process for measuring the cost of quality.

Mr. Ranjan Vasishtha, ex-DGM, Maruti Suzuki India was the faculty for the training program. The faculty covered the following

topics definition of COPQ, internal failure and external failure costs, appraisal costs, prevention costs, different elements of COPQ, understanding good costs and bad costs, and the calculation of COPQ.

The faculty taught the formula for calculating COPQ. The root cause analysis & countermeasures were also imparted during the training session. The faculty further discussed on various rules for reducing COPQ at shop-floors. The course emphasised on reducing COPQ for increasing profits, for improving quality management systems.

ONE DAY TRAINING PROGRAM ON ENERGY AUDIT

ACMA Northern Region organised a training program for its members of Delhi NCR zone, on Energy Audit on April 19, 2016.



The Energy Audit is the process that seeks to identify opportunities for energy conservation and acts as a help to develop an energy conservation program. It identifies where energy is being consumed and assesses energy saving opportunities. It aims to cut down the cost of energy as it identifies areas of conserving energy thus reducing energy costs.

In a plant, Energy Audit helps in increasing awareness of energy issues among plant personnel, making them aware about proper practices that would make them productive. It gauges the energy efficiency of the plant against "best practices". When used as a "baseline" for tracking yearly progress against targets, an energy audit becomes the best first step towards saving money in the production plant.

The objective of this program was to understand the definition of Energy Audit, need for Energy Audit, different types of Energy Audit, way to conduct an audit and understand various initiatives

taken by Government of India for efficient energy utilization.

The faculty for the training was Mr. Shalabh Kapoor.

Interestingly the participants shared their experience on energy conservation of their plants, where they saved energy to an extent of Rs. 50,000/- in a month by replacing all the lightings with LED lights. Most units aimed at keeping the power factor between 0.9-0.98. Few engineers informed of placing capacitors in parallel to the motor circuits. Another step mentioned was periodic checking of air leakages in ducts. One of the participating companies aimed at an 11% reduction in power bills every month. The common good practices of all the units were the implementation of TLC program, usage of solar panels, DG and compressor efficiency projects.

IN-HOUSE TRAINING ON FIRST AID AT AAM INDIA MANUFACTURING CORPORATION PVT. LTD.

ACMA Northern Region organised an In-house training program on First Aid for its member company – AAM India Mfg. Corpn. Pvt. Ltd., Uttarakhand on April 29 and 30, 2016 in collaboration with the association of Indian Red Cross Society.

The objective of this training was to apprise the people about Emergency Medical Services (EMS), save life and property, minimise injuries to prevent them from happening and hasten recovery. First Aid can be defined as an emergency aid or treatment given to someone injured, suddenly ill, etc., before regular medical services arrive or can be reached.



The faculty for the training was Mr. Gagan Gunavanth who possess more than five years of experience in conducting First Aid trainings in many industries.

The whole program was examined by Dr. Rakesh Sinha, Secretary, Indian Red Cross Society, and a Retired Chief Medical Officer-Uddham Singh Nagar.

The training covered the following topics during the course of the training, which included:-

- Identifying the four vital sign for judging whether first aid is to be imparted or not
- CPR training –Cardiopulmonary Resuscitation
- Steps to be taken during natural disasters
- Anaphylaxis treatment
- First aid for common medical conditions like Asthma, Chest pain, etc.

Second Zonal Quality Circle Competition, Rudrapur

ACMA Northern Region conducted the second Zonal Quality Circle Competition for Uttarakhand Zone on May 20, 2016. In total 23 teams from Uttarakhand Zone participated in the competition which witnessed over 115 delegates. The 3 member jury consisted of Mr. Rajesh Jain, Head-Supplier Quality at Tata Motors Ltd.; Mr. Vishwadeepak Khandelwal, Sr. Manager-TQM, Ashok Leyland Ltd. and Mr. Puneet Kapur an Ex-DGM of Maruti Suzuki Ltd.



Welcoming the dignitaries and the participants, Mr. P B S Rawat, Zonal representative of Uttarakhand Zone at ACMA Northern Regional Council and Plant Head of Roop Polymers Ltd. highlighted the benefits of Quality Circle movement that brings - in high level of bonding and confidence amongst the team members and in turn with the management.

At the valedictory ceremony Mr. Anil S Mahgaonkar, DGM & Plant Head, Bajaj Auto Ltd., Pantnagar was the Chief Guest. He urged the participating companies to make the processes robust so that,

various stages of manufacturing becomes easy for the operators at the shop floor. The teams were told to participate in the competitions of QC, TPM and Kaizen with an objective to improve quality, increase efficiency and make manufacturing plant with zero barriers for high productivity. He emphasized that all the problems should be tackled with deep observations for finding the root cause and further should work towards eliminating the causes.

Providing an overview of the complete presentations by the participating QC teams, Mr. Rajesh Jain, SQ Head-Tata Motors Ltd., a member of Jury team emphasised that QC tool has shown a paradigm shift in production. He lauded the participants for showing all QC tools and for approaching each problem solving systematically. He appreciated the upgrading of standards by supplier community especially due to the showcase of Shainin DOE and other DOE tools.

The winners of 2nd Zonal Quality Circle Competition, Uttarakhand Zone were:

POSITION	COMPANY
1 st	Rockstar team from WABCO India Ltd.
2 nd	Nakshatra team from Rockman Industries Ltd.
3 rd	Goal team from Minda Corporation Ltd.
4 th	Prayas team from Minda Corporation Ltd.
5 th	Udhan team from Lumax Industries Ltd. Pantnagar

16th BATCH OF SIX SIGMA BLACK BELT CERTIFICATION PROGRAM (LEVEL 1)

The Six Sigma certification program has been receiving an excellent response from the ACMA Members, and Northern Region have indeed successfully completed its 15 batches creating 255 Black belt personnel out of 508 in ACMA membership.



These 15 batches who have achieved Northern Region Black Belts have saved 183 millions in their companies, through 436 shop-floor problem solving projects undertaken by them. With this background, ACMA Northern Region launched its 16th batch on 21st April, 2016, the Module I of this 6 Module Certification Program was held from 21st to 23rd April 2016 in New Delhi.



Mr. Ram Narayan was the faculty for the program who has created 508 Black Belts in ACMA membership alone in all 4 regions. He, himself is a Six Sigma Master Black Belt.

There were 15 participants from eight Northern Region membership companies who underwent the training for six months, spending 2-3 days of class room training every month up till October 2016. During this period, the participants were expected to undertake 2 shop-floor related problems on which they would be guided by the faculty to solve the problems using the Six Sigma tools not only to get over with the problems as also to improve upon them.

The duration of the program will be 17 days which is divided into 6 modules, spread over a period of 7 months. The dates for the subsequent modules are provided below:-

- Module – II – May 20 - 21, 2016
- Module – III – June 21 - 22, 2016
- Module – IV – July 13 - 15, 2016
- Module – V – August 11 - 13, 2016
- Module – VI – October 3 - 6 (factory visit on October 3 - 4)

TRAINING ON LEAN MANUFACTURING AT AAM INDIA MANUFACTURING CORPORATION PVT. LTD. RUDRAPUR

ACMA Northern Region organised an In-house training program for its member company AAM India Mfg. Corpn., Uttarakhand zone on Lean Manufacturing, on May 27 and 28, 2016.



The objective of the training was to provide an opportunity to understand the fundamental principles of lean in manufacturing, Reduce Costs, Eliminate waste and Improve Customer Satisfaction. Lean Manufacturing is a production system best characterized as relentlessly eliminating waste from all of its activities and operations. Lean strives to produce products (and deliver services):



Mr. Ranjan Vasishtha, ex-DGM, Maruti Suzuki India was the faculty for the training program.

The course was highly interactive not only with reference to answering queries, but also in sharing presentations and technical & motivational videos, exercises, learning through playing games. The course also included project preparation and reviewing of projects.

TRAINING PROGRAM ON DAILY WORK MANAGEMENT (DWM)

ACMA Northern Region organised a training program for its members of Delhi NCR zone, on Daily Work Management (DWM), May 10, 2016. DWM is the system that provides the ability to manage departments, functions and processes, wherein processes are defined, standardized, controlled, and improved by the process owners. In essence, daily management is the application of the PDCA cycle to an operation in a repetitive, systematic way. The objective of the program was; to understand the definition of DWM, imbibe DWM in daily work and maximize profits with the help of DWM



Mr. Ranjan Vasishtha, ex-DGM, Maruti Suzuki India was the faculty for the training program. The faculty covered the following topics during the course of the training on Daily Work Management; Definition and Methodology for Effective DWM deployment; Hoshin Kanri (Policy Deployment); understanding

Mr. Ranjan Vasishtha, ex-DGM, Maruti Suzuki India was the faculty for the training program. The faculty covered the following topics during the course of the training on Daily Work Management; Definition and Methodology for Effective DWM deployment; Hoshin Kanri (Policy Deployment); understanding Role Clarity; Functions & Responsibilities of Management; Standard & Exactness; Define & Standardize; Established Ownership; Method of Daily Work Management; MPCP- Managing Points Checking Points and PDCA.



The faculty provided many examples related to the shop floor, whose implementation with DWM would reduce waste and hence save the cost of running the machines at the shop-floor. The above-mentioned course contents certainly ensures daily completion of routine tasks in a superior fashion as per the plans. Daily work completion is the primary objective of any department.

TRAINING PROGRAM ON NEW PRODUCT DEVELOPMENT & PRODUCT DESIGN

ACMA Northern Region organised a training program for its members of Delhi NCR zone on New Product Development & Product Design on May 31, 2016.



In a plant, New Product Development increases the market share by offering more choice or updating older products. It helps in



maintaining firm's reputation as technically advanced company.

The New Product Development is imperative to every organization's survival and is also essential to maintain its competitive edge. In the ever-changing and demanding environment, those organizations who have the ability to offer something new and better to the customers only, survive. For meeting tough customer expectations 'Time to Market' is a very important which can only be achieved through an efficient 'Product Design' process. Organizations that manage the whole cycle efficiently hold leadership positions and are seen as very progressive organizations

The objective of this program was to understand the main stages of designing and manufacturing a product, activities involved in testing and refining a new product and then launching and selling it, understand the concepts of life cycle costing and the product life cycle, become an active product owner and design an efficient product road map.

The faculty for the training was Mr. Shalabh Kapoor. The program covered topics pertaining to New Product Development & Product Design; definition of New Product Development & its requirement, categorization of new product development, product development – A Strategic Imperative or a necessity for survival, product planning - its definition & requirement, advantages of product planning, product development process, product development stages, definition of product design, process steps of product design, topic of effective design strategies covered - design for six sigma, quality function deployment, user centered design, phase-gate model, in product design techniques - bottom-up design, top-down design, front loading design & workflow, design for manufacturing (concept, principles, advantages), concurrent engineering was covered, characteristics of good design, barriers of good designing, bottlenecks faced in the process of new product development and steps to overcome bottlenecks.

The participants exchanged various innovative ideas implemented at their manufacturing facilities. The participants were satisfied with the value addition received from the training.

TRAINING PROGRAM PREVENTIVE & RELIABILITY MAINTENANCE

ACMA Northern Region organised a training program for its members of Delhi NCR zone, on Preventive & Reliability Maintenance on May 18, 2016. Preventive maintenance is the best option for companies that want to succeed long term, to achieve this they follow a pre-determined schedule so that there is no catastrophic failures and perform better over its useful lifecycle

NORTHERN REGION MEMBERS VISIT TO FORD INDIA PLANT, SANAND (GUJARAT)

ACMA Northern Region organized a 19 member delegation to the Ford India plant, Sanand on May 25, 2016 with an objective to introduce the members to the best practices followed at the plant.

Mr. Sunil Arora, Chairman, ACMA Northern Region welcomed the delegates and introduced them to the Ford team members. Mr. Arora provided a brief on ACMA, its membership and their capabilities.

Mr. Dhiraj Dixit Site Plant Manager, led the Ford team who introduced the Ford, Sanand Plant to the visiting delegates. He mentioned that the Sanand Plant caters to the production of "Figo Aspire" for Indian markets, following stringent quality standards. The highlight of the plant, was the two in-house high speed test drive facility. He also spoke about Ford's presence in India, its growth, challenges and opportunities both domestically and globally.



and proper equipment upkeep. Reliability of equipment would be to recognize the difference between equipment design and operations, and that each piece of equipment will have a different probability of undergoing failure from degradation in relation to another. A reliability-focused approach aims on structuring a maintenance program based upon the understanding of equipment needs and priorities, as well as limited financial and personnel resources, to plan activities such that equipment maintenance is prioritized while operations are optimized.

Preventive maintenance is regularly performed on a piece of equipment to preserve and restore the machine by replacing worn components before they actually fail. Preventive maintenance activities include partial or complete overhauls at specified periods, oil changes, lubrication, minor adjustments, and so on.

Mr. Ranjan Vasishtha, ex-DGM, Maruti Suzuki India was the faculty for the training program. The faculty covered the following topics during the course of the training on Cost of Poor Quality which included; History of maintenance, difference between breakdown and preventive maintenance, use of preventive maintenance, definition of equipment reliability; benefits of effective deployment of Preventive & Reliability, definition of OEE (Overall Equipment Effectiveness), Maintenance and improvisation of Operator involvement in Equipment Maintenance

The faculty taught the participant to improve Equipment Reliability so as to produce a high quality product.



Regular activities like awards and recognition program, supplier meet, employee engagement survey is all a part of their routine activities, apart from their Ford's Corporate Social Practices (CSR)

During the plant visit, members witnessed world class manufacturing and best practices followed. Overall the visit was termed fruitful and informative by members. Mr. Dixit who had coordinated the visit thanked ACMA for organising such a useful visit.

ACMA NR Chairman Mr. Sunil Arora thanked Mr. Nigel Haris, MD, Ford and Mr. Dhiraj Dixit and their team for the useful opportunity provided to the ACMA members. On behalf of the entire automotive component industry, he assured the Component Industry's full support to Ford and their team in fulfilling their objectives.



SOUTHERN REGION

STRUCTURING INDUSTRY ACADEMIA PLATFORM – 1ST ROUNDTABLE

ACMA Southern Region instituted an innovative initiative of structuring a formal Industry-Academia platform. The idea that was seeded over a year ago finally saw some shape and saw its first shoots in the form of a Roundtable, organized on May 20, 2016 in Chennai.

A Four core member team including Mr. Ram Venkataramani, Chairman, Mr. P. Kaniappan, Deputy Chairman, Mr. V. Thiagarajan, General Manager, Wabco India Ltd and Dr. Mahadevan, Director, India Pistons Ltd. structured a possible and effective engagement platform with the academic institutions to bolster industry effort.



An initial questionnaire was circulated to select engineering institutions in and around Chennai and Bangalore seeking inputs on the service capabilities and available infrastructure that could be used by the industry in cooperation and collaboration of the institution.

A follow-through of this was the 1st Roundtable with 7 academic



engineering institutions and 26 participants from member companies.

ACMA requested the participants to make a short presentation about their institutes and suggested them to cover the following points:

- Talent generation & Skilling
- Facilities available
- Training / Proving Ground availability
- Centres of Excellence if available or willing to develop
- Project Repositories
- Faculty exposure
- Customization opportunities
- Engineering outsourcing resources

Indian Automotive companies are today operating to global standards. In order to compete with global players, we have to look for new avenues. Industry institute partnership is imperative as for bringing in affordable and new technologies in the shortest lead time will be a key factor for competition, which if not addressed appropriately and on time, many companies will not be able to survive. We need to adapt new technologies to suit Indian conditions, with cost focus, said Mr. P. Kaniappan.

Dr. R. Mahadevan, Director, India Pistons and moderator for the session, highlighted the future goals of the automobile industry which is to grow by 5x in terms of turnover and 8x in exports by 2026.

He emphasized that for realizing the dream of "Make in India for the World", the most important aspect is sustained competitiveness. "Innovation is the key for achieving sustained competitiveness. Industry / institute interaction can bring in innovation. We need a structured Eco system to nurture industry / institute interaction. Technology development, right skill sets and constant updation are essential for sustained competitiveness. Industries and institutes have to come forward to work together.

Mr. V. Thiagarajan, General Manager, WABCO in his presentation highlighted the synergy of WABCO with various educational institutes which has helped the company benefit in many ways. Mr. Manjunath, General Manager Sales from FANUC talked about the advanced training facilities available on CNC machine control system and showcase a case study on a setup done at PSG College Coimbatore.

Participants profile included team members from Senior management and R&D and HR functions of member companies, who termed the initiative very useful with many take aways.

MODULE 1 – SIX SIGMA GREEN BELT CERTIFICATION PROGRAM

ACMA Southern Region organized the First Module of its fourth batch of Six Sigma Green Belt certification program at ACMA office from May 4-6, 2016.



The program was attended by 13 delegates from 7 companies.

The faculty for this program was Mr Viswanthan from World Class Manufacturing Solutions. The participants were introduced to the certification process. They were also trained on introduction to improvement methodology in Six sigma initiative, select and prioritise improvement projects, problem definition – Step 1 – understanding the problem, Step 2 – Observation and data analysis, Step 3 – Identification of suspected sources of variation for the problem and also Measure and Analyse – Introduction to the data based techniques for pinpointing cause(s).

A sample test of the final assessment of Green belt certification was sent to the participants to help them understand the methodology.

TWO DAYS WORKSHOP ON GEOMETRIC DIMENSIONING & TOLERANCING

ACMA Southern Region organized a two days workshop on Geometric Dimensioning & Tolerancing (GD&T) on May 20-21, 2016 at ACMA office, Chennai. The faculty for the program was Mr G C Ramamurthy, a Zero Defects Consultant.

The workshop covered an introduction on GD&T, the need for GD&T, use of modifiers and resultant conditions bonus tolerance. Further it also covered datums, importance of datum precedence, datums of size, their effect on location, simulated datum feature,

true geometric counterpart, datum targets and datum reference frame. Day 2 covered displacements and their effects, feature control frames, interpretation of frames, form tolerances and orientation tolerances. The workshop had a pre assessment test with questions and a quiz post the workshop.

Through this workshop delegates were able to interpret the rules of GD&T, understand the concept of basic dimensions, virtual condition, inner and outer boundary, worst case boundary and bonus tolerance. They also learned on principles of datum, datum of feature size. The delegates at the end of the workshop could also identify the different types of tolerances.

Many implementable ideas emerged in response to feedback during the program.

WORKSHOP ON APQP-PPAP FOR BETTER IMPLEMENTATION

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

The program covered the need of Advanced Product Quality Planning (APQP) followed by the goals of APQP. The workshop was conducted with exercises to help delegates understand the



benefits of APQP. The APQP manual was given to the delegates as training material which covered fundamentals of product quality planning, product design and development, process design and development, product and process validation, feedback assessment and corrective action and control plan methodology.



The workshop was attended by 21 delegates from 8 companies. The delegates found the workshop useful and relevant to their companies. They also appreciated the course content which was explained with examples.

WORKSHOP ON MANUFACTURING COST ESTIMATION AND COST CONTROL AT PRICOL LTD, COIMBATORE

ACMA Southern Region organized a workshop on Manufacturing Cost Estimation and Cost Control at Pricol Ltd, Coimbatore on April 21, 2016. 12 delegates from 4 companies participated. Mr P S Satish, was the faculty for the workshop.



The following topics were discussed in the workshop; importance of costing, depreciation, cost of long term assets, depreciation methods, cost calculations overhead method, types of costs, costs of capital, service costs, risk costs and fixed and variable costs.

Illustrative examples formed part of the training, with exercises on depreciation, calculation of component price and machine hour rate and make or buy exercise.

The workshop helped the participating delegates in applying the concepts through practical examples assigned to them. A video of 7 wastes was shown to the participants on identification of wastes.

The workshop was found relevant by all the participants and many of them identified implementable ideas which could be practiced at their companies.

WORKSHOP ON PRODUCTIVITY IMPROVEMENT THROUGH ELIMINATION OF WASTES, COIMBATORE

ACMA Southern Region organized a workshop on Productivity Improvement through Elimination of Wastes at Roots Industries India Ltd, Coimbatore on May 21, 2016. The training was conducted by Mr P S Satish.



The workshop covered the following topics; Introduction, value v/s wastes, wastes in manufacture, wastes in other areas, Kaizen as a tool for waste elimination, Kobayashi keys/tools, 3M, steps for waste elimination, measuring productivity improvements. Through this workshop the participants understood that elimination of waste leads to productivity improvement, improvement of cost and lead time. The participants were also made to understand value versus on value added activity. The participants were also empowered with new tools to identify wastes, value stream mapping, OEE and Jidoka. The workshop also covered Kobayashi keys for productivity improvements. Waste reduction implementation was taught through a structured

WESTERN REGION

2nd Zonal Kaizen Competition, Aurangabad

With the overwhelming response received during the 1st zonal Kaizen competition in May 2015, ACMA Western Region once again organised 2nd edition on April 28, 2016.

To provide equal opportunities, the competition was held in two category i.e. a) Engineer and b) Non Engineer category. Over all 34 teams participated against 31 of the 1st edition.



approach including key indicators for operational performance.

The workshop was attended by 15 delegates from 4 companies. The delegates found the workshop extremely relevant to their workplace and identified many implementable ideas as takeaways from the workshop.

WORKSHOP ON SMART WORKING CULTURE

Working smart improves the proficiency and productivity of employees in an organization. The ability to complete a task within limited time and resources in a proficient manner is termed to be working smart.

The ability to adapt to the change, following good working habits, knowing and understanding the importance of goal setting, time management, delegation and planning and most of all communication are some of the skills required for a smart working culture.

ACMA-SR- Karnataka & Hosur zone organised a workshop on Smart Working Culture for K & H members in Bangalore. Faculty for the program was Mr Subramaniam Chittur.

The workshop explained the importance of goal setting at work and in personal life, time management and planning. He spent lot of time on conversational and communication, as this is the main factor for personality development. The workshop focused on positive thinking, stress management, SMART goals, work-life balance, listening effectively, assertiveness, conflict resolution, collaboration, decision making and negotiation skills.



The 11 participants found the program good and very interactive.



All leading member companies based out of Aurangabad namely Aurangabad Electricals, Badve Group, Birla precision, Durovalves, Endurance, Hindustan Composites, Minda Corporation, NRB Bearings, Sanjeev Auto, Varroc Group, Yeshshree, Metalman and Laximi metal nominated their teams for the competition.

The Kaizen case study presentation made by companies focused on:

- Rejection Control

- Man power cost
- Reduction in noise level
- Reduction in re-work
- Safety
- Reduction in set-up time

Continuing the tradition, the OE customers were invited as Jury to witness the case study presentation. The Jury comprised of Mr. Udayraj Randale, DGM, Bajaj Auto Ltd, Waluj Plant, Aurangabad and Mr. Naga Ravikanth, AGM, Skoda Auto India Pvt. Ltd., Aurangabad.

The Jury members were impressed to see the Kaizen implemented by the ACMA member companies and appreciated the team work and efforts made for continuous improvements.

Welcoming the participants at the Inaugural Session, Dr. Vivek Naik, President (Friction Materials), Hindustan Composites Ltd said, "Today in this competitive world customers' demand high quality at low cost. The biggest challenge before us is to apply our engineering capability to compete both in cost and quality."

In his address at the valedictory session Mr. Naveen Nijhawan, Vice President- (Motorcycle Division), Bajaj Auto Ltd, Waluj Plant, the Chief Guest for the event said, "we must inculcate kaizen in each area of the business for best possible results."

Mr. Naveen Nijhawan, congratulated the winners and presented the awards.

Winners under Non –Engineer Category :

Position	Team	Company
1st	Bharari	Badve Engineering Ltd. U II(Silencer Div)
2nd	Pragati	Yeshsree Press Comps Pvt. Ltd.
3rd	Achivers	Endurance Technologies Pvt. Ltd (Braking Div)

Winners under Engineer Category:

Position	Team	Company
1st	Urja	NRB Bearings Ltd.
2nd	Ambition	Varroc Engineering Pvt. Ltd.
3rd	Nath Sagar	Hindustan Composites Ltd.

In addition to the above, the presentation made by team Atharv from Sanjeev Auto Parts Manufacturers Pvt. Ltd., team Sankalp from Durovalves India Pvt. Ltd. and team Creative from Badve Engineering Ltd. Unit 16 were judged the best under Safety, Energy and Cost Category.

PROGRAM ON "CYCLE TIME AND COST REDUCTION THROUGH USING VARIABLE SEARCH METHODOLOGY": MODULE-1

Cycle time reduction is the strategy of lowering the time it takes to



perform a process in order to improve productivity. In addition, cycle time reduction often improves quality. When a cycle time is too close to the task time, there is little margin for error. If a process is dialed in with very little variation, this is seldom a problem. But most processes have some inconsistency in them, resulting in people falling behind the normal pace on occasion. Reducing cycle time is a low cost way to add a bit of a buffer to avoid those sorts of defects.

With the objective to impart the skill in Optimizing process parameters to reduce Cycle time and cost without affecting product quality, ACMA Western Region organized a new shop-floor improvement open house program on "Cycle time and Cost reduction through Process Parameter Optimization using Variable Search methodology" in Pune from April 14-16, 2016.

The program was aimed for Manufacturing Process Engineers and Quality Engineers. The program was divided in to two modules.

In Module-1 topics /content included: introduction to variable search methodology for doing process parameter optimization and explanation of the four steps in the methodology i.e. Planning, Analysis, Improve and Control.

The program was conducted by Mr. Ram Nayaran, who explained the process optimization which is done to achieve an optional process parameter condition where no defects are generated, cycle time is less and production cost is least. Process optimization can be done for all existing process, new process, existing process but new machine and totally new process to the organization.

The member companies such as Araymond Fasteners, Advik Hi-Tech, Dana India, Helvoet, Huf India and setco were among those who nominate the people for the program. The feedback received was encouraging.

GYAN DARSHAN - INTERACTION WITH HR EXCELLENCE AWARD WINNING COMPANIES

ACMA Western Region organized knowledge visit "Gyan Darshan" to HR Excellence Awards winning companies; Bosch Limited, Nashik and Abhijeet Techno-Plast (I) Pvt. Ltd., Nashik on 13th May 2016 for sharing their success stories and HR best practices with the ACMA member companies.



Bosch Ltd., Nashik has state of the art manufacturing facility with high precision and latest manufacturing processes and testing equipment to ensure high quality products. Bosch, Nashik has highly motivated workforce with good combination of experience and young talent pool leading to excellent teamwork. The company has developed a midterm plan "Fit for Future" that focuses on growth through absorption of suitable product technologies and cost leadership through localization strategy.

Presenting an over view on the Bosch Ltd., Mr. Sandeep Karkhanis, Senior Manager, Business Excellence mentioned that in order to remain cost effective and ensure high quality production and sourcing base, the company makes concerted efforts in developing competence of supplier base, mainly the value chain partners.

Abhijeet Technoplast (I) Pvt. Ltd. Nashik plant, practices daily work management department wise and leaders' DWM. Blue collar employees are trained in dexterity school for various skill improvements. The company has implemented First in First out

(FIFO). The company's employee satisfaction score is 4.27 out of 5. In supplier capability audit conducted by M&M the company earned 4.22 score out of 5.

Mr. Manish Chulte, Plant Manager presented an overview on the company and its achievements. Mr. Chulet mentioned that the Nashik plant is dedicated mainly for Mahindra & Mahindra.

The presentation on HR update & employee Responsibility presented by Ms. Pallavi Bhatkar explained about LEAD (Leadership Exploration and Development), HR Structure, Spine HRMS - Digitisation of HR Process, PMS Process, Employee engagement activities & CSR activity etc.

The members of delegation were impressed to see implementation of best practices at the shop Floor, specially FIFO, DWM, Employee engagement calendar & Poka Yoke. The feedback received from delegates was encouraging.

TWO DAY WORKSHOP ON "IMPROVING OPERATIONS PERFORMANCE WITH WORLD CLASS MANUFACTURING TECHNIQUES"

Today, Manufacturing does not only involve the conversion process that takes place on the shop floor, but a whole lot of activities such as materials management, equipment and tooling, material handling, assembly, quality control, maintenance, planning etc.



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

The workshop was aimed for operations in charge, production managers, line supervisors, industrial engineers, process engineers from various organizations who are responsible for shaping the company's best practice strategy.



The training was conducted by Mr. Jalay V. Pandya, Director-Faber Infinite-Africa, Middle East & Asia Pacific. The workshop introduced the participants to lean basics and eight types of wastes produced during manufacturing activities. To make the session interactive the faculty divided the delegates into teams where each team was asked to represent departments like planning, stores, production, quality, dispatch and customer. The participants were then given the task to manufacture a plug within a stipulated time. This exercise helped the team members to understand the concept of TPM, Muda (waste) and Muri (over burden), Flow Management, Line Balancing and Inventory Management.

Overall 14 delegates attended the workshop and the feedback was encouraging. The key takeaways were streamlining the entire system by eliminating Waste (Muda) and error-proofing (Poka Yoke) to maximize the customer experience, reduce cycle time and throughput time by proper line balancing and prevent defects from being produced in the first place, rather than installing rigorous inspection systems to detect the defect after it has been produced.

WORKSHOP ON "INCREASE PROFITABILITY THROUGH REDUCING COST OF POOR QUALITY (COPQ)"

Cost of poor quality (COPQ), is a cost that would wave off if systems, processes, and products work in synch. Cost of poor quality is a refinement of the concept of quality costs. COPQ was popularized by IBM quality expert H. James Harrington, he adopted the name "poor quality costs" to emphasize the belief that investment in detection and prevention of product failures is more than offset by the savings in reductions in product failures.

To create awareness on the subject ACMA (Western Region) organized Workshop on Increase Profitability through reducing Cost of Poor Quality (COPQ)" on 20th May 2016 at ACMA Pune Office.



The workshop was aimed for Plant Head, Quality Assurance Department Head, Quality Assurance Managers/Executives and Improvement cell managers, to understand costs associated with quality and its impact to organization, calculate cost of poor quality and how to reduce cost of poor quality.

Mr. Vishal Kulkarni, Director, Faber Infinite Creative Solutions Pvt. Ltd. was the faculty, explained 1-10-100 rule that is used in the quality control process to quantify the "soft costs" of quality issues.

There were 19 delegates who attended the workshop and the feedback was encouraging.

SESSION ON "INTERNAL FINANCIAL CONTROLS OVER FINANCIAL REPORTING UNDER THE COMPANIES ACT 2013"



Under the Companies Act, 2013, it is mandatory for all the companies (including unlisted and Private companies) to implement internal controls over financial reporting. Besides the auditors who need to comment on the operative effectiveness of these controls, the Board also requires to report the details in respect of adequacy of internal financial controls with reference to the financial statements. To create awareness among the membership on the subject, ACMA Western Region organized a Session on "Internal Financial Controls Over Financial Reporting under the Companies Act, 2013" on May 5, 2016 at ACMA Pune Office.

Mr. Prasad P Bhalerao, Director, Prossure Consulting conducted the session. The session covered the "Scope & Applicability" of section 177(4) and (5) for listed and specified unlisted companies and section 143(3) (i) for all companies, Role and responsibilities of IFC and ICOFR under the companies Act, 2013 (the "CA 2013") cast specific responsibility on the Company's Board of Directors, audit committee and statutory auditors for implementing, reviewing, evaluating and reporting.

The session further dwelled on ICFR requirements & implement methodology and alignment of IFC with COSO framework in detail, that requires organization wide awareness and action program. The session was attended by 19 Finance professionals. The participants valued the knowledge imparted in the session.

TRAINING PROGRAM ON "PROBLEM SOLVING TECHNIQUES- 8D"



The eight disciplines (8D) model is a problem solving approach, initiated in the automotive industry for product and process improvement. Its purpose is to identify, correct, and eliminate recurring problems. It establishes a permanent corrective action based on statistical analysis of the problem and on the origin of the problem by determining the root causes.

ACMA Western Region organised a training programme on "Problem Solving Techniques- 8D" on April 19, 2016 in Gujarati/Hindi and April 20, 2016 in English at Ahmedabad. The objective of the training was to help participants solve problems by finding real root causes and to take action that permanently removes the problem.

The training was aimed for team members from all aspects of the organisation who are responsible for solving problems and to those who contribute to problem-solving and continual improvement activities.

The training was conducted by Mr. Himanshu Pancholi, Principal Consultant, Trainer & Auditor with GK Engineers. The key takeaways that emerged from the training were; by using a standard process to solve problems and communicate lessons learned across the organization, teams can become more efficient and effective and by identifying the symptoms, implementing emergency response actions, teams can resolve problems and further improve Customer Satisfaction.

Overall 36 delegates attended the training and the feedback was encouraging.

TRAINING PROGRAM ON "SINGLE PIECE FLOW"

ACMA Western Region organized one day training program on "Single Piece Flow" for Mahindra CIE Automotive Ltd. at Chakan Pune, on May 4, 2016.



The senior executives from various departments; production, press shop, machining and maintenance attended the training.

Mr. Vishal Kulkarni, Director of Faber Infinite was the faculty for the training. The workshop touched upon value adding and non-value adding activities that also sighted examples on 3 Mu's and 8 waste.

The training conducted was a combination of interactive tutorials, group work, and case study/ simulation games/ exercise/ experiential learning.

WORKSHOP ON "PREVENTIVE AND RELIABILITY MAINTENANCE"

Ineffective Preventive Maintenance programs produce unnecessary downtime due to equipment failures, resulting in high maintenance and operation cost, lower quality and lower productivity. These consequences mean that optimizing current preventive maintenance program isn't just a maintenance objective, it is an organizational imperative.



To address these concerns ACMA Western Region organized a workshop on Preventive and Reliability Maintenance on May 6, 2016 at ACMA Pune office.

The workshop was aimed for Supervisors/Officers and Managers from all departments. Mr. Vishal Kulkarni, Director, Faber Infinite Creative Solutions Pvt. Ltd. was the faculty.

Preventive Maintenance is done to prevent break down of the machine. This helps to reduce losses and increase profitability. Reliability maintenance is function oriented. It assures that the tool available is in working condition and will work as in when it is under use.

Touching upon types of maintenance, the following were explained in detail:

- Breakdown Maintenance
- Time based Maintenance
- Condition based maintenance
- Deductive maintenance
- Reliability centered maintenance

There were 25 delegates who attended the workshop and the feedback was encouraging.



YBLF :

YBLF MISSION TO CZECH REPUBLIC

In order to strengthen the existing linkages as well as to bring new opportunities for the auto component industry in India, ACMA with the support of Indian Embassy in Czech Republic organised a delegation for its Young Business Leaders Forum (YBLF) to Czech Republic.

Mr. Sanjay Labroo, Chief Mentor of YBLF & Past President ACMA led the twelve member delegation of young CEOs to Czech Republic from 18-22 April, 2016. The broad objectives of this mission was to strengthen the economic and commercial relationship between both the countries, provide insight on Czech Republic as well as its policy, investment opportunities to the delegates, understand the existing levels of technology, quality, productivity, R&D in the Czech automotive industry, meet with vehicle manufacturers and Tier 1 suppliers, assess the possibilities of developing long term business relationship with the Czech Vehicle Manufacturers and Component Suppliers.

The delegates were made privy to the best practices followed by OEMs in Czech Republic like Skoda and Toyota Peugeot Citroën Automobile (TPCA). They also got a chance to interact with several agencies and representatives from the Czech. Mission began with the visit to Skoda plant in Mlada Boleslav where the delegates visited the Skoda Parts Centre, its manufacturing plant and Skoda Museum along with an interaction with Mr. Dieter Seemann, Head – Purchase and his team.

The other meetings and plant visits during the mission were Toyota Peugeot Citroën Automobile (TPCA), Indian Embassy, Czech Invest, KPMG, Mahle Behr, Magna Automotive and Varroc Lighting System.

The overall feedback received from members was very encouraging and all the mission members agreed that there is a lot of opportunities for the Indian Auto component manufacturers with the Czech companies.



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Engineered Above 4070 TR



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Hot Air Dryer
13 kg to 400 kg



HAD (L) series
Hot Air Dryer
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CONVEYING



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Auto Loader
150 kg/hr to 1000 kg/hr
Engineered Above 1000 kg/hr



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Engineered Above 500 kg/hr



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BLENDING



BCD series
Gravimetric Blending
160 kg/hr to 2150 kg/hr
Engineered Above 2150 kg/hr



BVD series
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Dosing Screw Throughput
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INDUSTRY NEWS

AMP 2006-2016: This is how automotive Industry performed in the last 10 years

While some of the targets set 10 years back have been met, many have proved a little too steep to climb.

Excerpts from ET.Auto

The first phase of Automotive Mission Plan, which was from first 2006 to 2016 has just been completed. While some of the targets set 10 years back have been met, many have proved a little too steep to climb.

Seven major targets were set at the beginning, which included total turnover, employment generation, contribution in GDP, PV, production CV production, three-wheeler production and two-wheeler production.

TARGET Vs ACTUALS (QUICK ESTIMATES)

	Target FY16	Actual FY16 (estimation)
Turnover	INR 5,61,200 - 7,31,400 crores	INR 6,01,000 crores
Employment	35 million	32 million
% Share in GDP	10%	~7.2%

Total Turnover

In 2006, The Indian automobile industry's turnover was perched around the \$28 billion mark, which roughly translated into Rs 1.23 lakh crore according to the \$ exchange rate of Rs 44 at the time. The AMP 2006-2016 had laid out a target to reach a turnover of Rs 5,61,200 crore to Rs 7,31,400 crore.

After the 10 years, it is estimated that the industry will breach the base target and clock Rs 6,01,000 crore in FY2016.

Employment

AMP 2006-2016 had set a target that automotive industry will employ 35 million people, including direct and indirect jobs, by 2016. However, the industry could reach only 32 million jobs. In 2006, 10 million people working were employed in the industry.

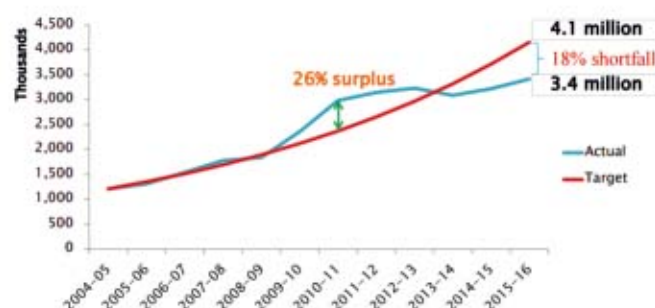
% Share of GDP

At present, the contribution of automotive industry to overall Indian GDP has only reached 7.2 percent, instead of 10 percent set in AMP 2016

Passenger Vehicle Production

There are two ways to look at the result. In one, the industry has fallen short of what it set out to achieve and in another it has bettered the target.

PASSENGER VEHICLE PRODUCTION



The annual production target of 4.1 million passenger vehicles was missed by 18 percent and reached only 3.4 million. At the peak around 2011, the industry was nearly 26% ahead of the projections. But the start of decline in market sentiments soon after, which continued till the end, has made all the automakers' plans go haywire.

On the other hand, it has sold 27.91 million units cumulative in the last 10 years, as against the proposed 27.75 million units.

Commercial Vehicle Production

The fortunes of commercial vehicle segment have fluctuated even more than that of PV segment. For the first two years, the actual numbers stayed comfortably ahead of the projections. The downturn of 2008 soon pulled the industry down as economic growth came to a standstill in many sector.

COMMERCIAL VEHICLE PRODUCTION



The CV market recovered in a jiffy, taking the production numbers to an all time high in 2011. At this point, nearly 900,000 CV were manufactured in the country, 43 percent higher than where it was expected to be.

However, the market scenario changed drastically and numbers fell faster to the previous low of 2008. The segment recovery started almost a year ago but the final target of 890,000 units was not achieved. At 783,000 units produced in FY2016, there was a shortfall of 12 percent.

The cumulative production from 2006-2016 stood at 7.1 million units, which is higher than the proposed 6.7 million by almost 7 percent.

THREE WHEELER PRODUCTION

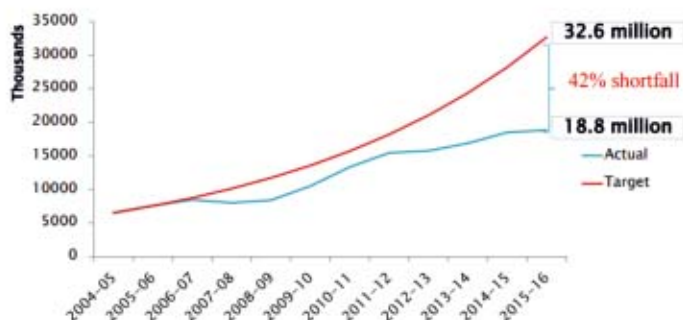


Three Wheeler Production

The 3wheeler segment for most part of the tenure of AMP2016, stayed above the point where it was expected to be. It was only in the final year-and-a-half, that the numbers fell below expectations. At the end of the 10 years, three wheeler production mark was missed by 4 percent. Instead of the targetted 970,000 units, only 934,000 units were produced.

Being consistently above the mark meant that three wheelers had the highest surplus among all other segments in cumulative growth. With production of 7.8 million 3wheelers, the segment outperformed the cumulative target by 9 percent.

TWO WHEELER PRODUCTION



Two Wheeler Production

Two wheeler segment was the only segment where both annual production and cumulative production targets were missed, and too by huge margins.

The annual production target was missed by 42 percent whereas the cumulative one was missed by 25 percent. Manufacturing 32.6 million two-wheelers annually was the goal, but only 18.8 million were produced.

Total combined production in the ten years from 2006 to 2016 was 142 million, as against the set target of 192 million.

OVERALL PERFORMANCE

Segments	Target FY16	Actual FY16	Shortfall	Target Cumulative FY06 - FY16	Actual Cumulative FY06 - FY16	Shortfall/ Surplus
	In Million		%	In Million		%
Passenger Vehicles	4.1	3.4	18%	27.75	27.91	1%
Commercial Vehicles	0.89	0.78	12%	6.7	7.1	7%
Three-wheelers	0.97	0.93	4%	7.2	7.8	9%
Two-wheelers	32.6	18.8	42%	192	142	25%

Monsoon prediction gives all automotive segments a reason to cheer

Industry experts said that in never in India have there been three consecutive years with below normal monsoons.

Excerpts from ET.Auto

NEW DELHI: India Meteorological Department's (IMD) forecast of above normal monsoon has sent a wave of hope through the automobile industry. Almost all segments are hoping in a spurt in demand in the coming quarters.

IMD on Tuesday had forecasted that this year the monsoon is expected to be 'above normal' at 106 percent. This comes after two consecutive years of drought wiping off a big chunk of gains made by automotive industry in three years prior to that.

"It will be very good for the industry if the monsoons are as predicted. It will create positive sentiment in the rural market," said Vinod Aggarwal, CEO, Volvo Eicher Commercial Vehicles. "Rural market is critical, especially for light and medium duty trucks."

The light commercial vehicle segment (LCV) has already started

seeing growth in the last couple of months and a good monsoon is expected to give a further boost to the demand.



Good monsoon is also expected to generate good demand for FMCG products, in turn leading to higher demand

for logistics services. "This will have a rub off effect on the sales of trucks as well," said Rajeev Singh, Partner and Head, Automotive Sector, KPMG.

Singh said that the effect of good monsoon will be first visible on the tractor and motorcycle segment and then slowly move to commercial and passenger vehicle segments in around six months later.

The segment that is expected to get a push from the above average rainfall is the two-wheeler segment, especially the motorcycles. After FY2012-13, the motorcycle production has fallen again in the last fiscal year. Once one of the fastest growing automotive segment in India, the motorcycle segment has been hit the hardest by the faltering rural economy.

In FY2016, cumulative production of motorcycle segment stood at 12,816,012 which is 1.5 percent as compared to total motorcycle production of 13,011,219 units in FY 2015.

"The two-wheeler industry has remained sluggish for the past four years, which has adversely impacted growth. A good monsoon after two consecutive years of sub-normal rains could lead to a change in sentiments in the rural markets," said a spokesperson from HeroMoto Corp.

"In addition to a good monsoon, higher spend on infrastructure and an impetus on non-farm rural market could also potentially lead to a positive turn-around in the industry in the second half of this fiscal," the spokesperson added.

Industry experts said that in never in India have there been three consecutive years with below normal monsoons. "A lot of people have been predicting a good monsoon even before the official forecast came out as there is no history of three successive monsoon failures," said RC Bhargava, Chairman, Maruti Suzuki. "A good monsoon will bring about better demand and it will help better capacity utilisation and the inventories too should go down."

Maruti said that its sales in rural market had nearly halved in 2015-16 from nearly 22 percent. "With good monsoon, I hope the demand in rural market will pick up again and go to near 20 percent," Bhargava said. The stocks of auto companies too saw the immediate positive impact of the monsoon prediction as they outperformed the market on Wednesday. Bajaj Auto saw the biggest jump among two wheeler makers with its shares gaining 4.9%. Shares of Hero MotoCorp jumped 3.3% and TVS Motor Company's by 2.5%. In passenger vehicle, Mahindra was the biggest gainer with over 7 percent rise in its share price.

Jamna Auto's on the move with rise in truck demand

The blend of rich product mix and lower fixed cost per unit increased operating margin by 410 basis points year-on-year to a record high of 15.5% in the March quarter.

Excerpts from ET.Auto



IET INTELLIGENCE GROUP: Jamna Auto, a supplier of leaf springs to commercial vehicle (CV) makers, has been a key beneficiary of a turnaround in the demand cycle for CVs after it witnessed the worst contraction in

volumes in the last 20 years. Higher utilisation of its capacities has yielded earnings growth of 142% in FY16.

The blend of rich product mix and lower fixed cost per unit increased operating margin by 410 basis points year-on-year to a record high of 15.5% in the March quarter. The company holds nearly 66% market share in supplying leaf spring to the truck makers such as Ashok Leyland, Tata Motors and Bharat Benz. It is the world's third largest leaf spring manufacturer.

The company dominates the parabolic spring type suspension with a market share of 90-95% and enjoys superior margins than conventional leaf spring suspension. It will ramp up its capacity to 2,20,000 tonnes by FY17-end from 1,80,000 tonnes. The company is targeting a volume growth of 15% in the current fiscal after having on an average 20% growth in the previous two fiscals.

The target looks achievable for two reasons. One, given the pickup in freight movement, heavy commercial vehicles (HCV) growth is expected to remain above 15%. Also, light CV (LCV) segment is showing signs of recovery. This could increase the offtake of parabolic spring.

The other reason is that the company targets 33% incremental revenues from new products such as lift axle, air suspension, 33% revenue from aftermarket and exports and 33% return on capital employed.

Currently, the aftermarket for suspension segment has a market size of about Rs 1,600-1,800 crore. The unorganised players have market share of over 85% and their products are cheaper by 15%.

The company expects it can gain sizeable market share from the unorganised sector after the implementation of the Goods and Services Tax (GST) bill. It has set up a new plant in Hosur to serve export markets and large players such as Daimler and Volvo. It aims for 10% export revenue in the next few years from 2% currently. At the Friday's closing price of ₹159, the stock was available at 11.5 times the FY18 projected earnings.

NGT hears pleas of auto industry and central government not to ban diesel vehicles, next hearing in July

While this stagnation is welcome news, and an indication that emissions can be controlled, it does not mean that global warming has stalled. That's because there is already excess greenhouse gases in the atmosphere.

Excerpts from ET.Auto

NEW DELHI: The National Green Tribunal on Tuesday gave all states three weeks to prepare and present a report on pollution levels in their worst-affected cities.

A bench headed by Chairperson Swatanter Kumar directed each state to submit details about two most-polluted cities in their territories, including data on pollution from dust, vehicular density and population. The matter will next come up for hearing on July 11-12.

The directions came after the counsel for the automobile industry pleaded before the tribunal not to pass orders before hearing auto makers' contentions. Industry body Society of Indian Automobile Manufacturers (SIAM) said vehicles with diesel engines displacing 2 litre and more are not a major cause of pollution. The contribution of these vehicles is minuscule, unlike dust which is the major source of pollution in the country, its counsel argued.



The central government, too, had moved the NGT saying any ban on diesel vehicles would hurt investments and employment in the manufacturing sector. Additional Solicitor General Pinky Anand, representing the Centre, said about 8% foreign direct investment under 'Make in India' has come from the auto industry and that the sector generates large employment opportunities.

"We don't want the industry to suffer, which is why the government has brought fuel guidelines. The whole idea is that people must prosper. The NGT passed an order but the same was stayed by the high court. There aren't enough evidences to show that diesel vehicles are causing more pollution," Anand said after the hearing.



The NGT had recently banned the sale of large diesel-powered passenger vehicles in some cities of Kerala, but that order was stayed by the state high court. In the National Capital Region, however, registration of large diesel cars and utility vehicles isn't happening since December because of a ban imposed by the Supreme Court.

Anand said there must be broad long-, short- and medium-term plans to curb pollution.

The NGT is hearing a petition that seeks to put restrictions on diesel-powered vehicles to reduce air pollution in 11 cities, including the metros of Mumbai, Hyderabad, Chennai, Kolkata and Bengaluru.

Overall, industry experts say, about 4 lakh diesel vehicles with 2-litre or larger engines are sold in the country annually. The ban in the NCR has already resulted in a production loss of 11,000 vehicles, affecting 5,500 jobs, including at dealerships, according to the Society of Indian Automobile Manufacturers. Had the ban been countrywide, it would have led to a loss of 47,000 jobs, it estimates.

The local units of Toyota and Mercedes-Benz, and Mahindra & Mahindra are expected to be hit the most if the ban is extended to more areas, as several of their popular vehicles come under the banned category.

Members' Room

AFFILIATE MEMBERSHIP - NORTHERN REGION

Authentication Solution Providers' Association (ASPA)

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Year of Incorporation/Registration: 1998
Legal Status: Society

ORDINARY MEMBERSHIP - NORHTERN REGION

Amar Autotech Pvt. Ltd. GT Road, Near Mittal Dharam Kanta Dhandari Kalan Ludhiana

SSI/Large & Medium/Etc.: Medium
Products Manufactured: Sheet metal components, cover mufflers, silencer parts, sub-assemblies
Certification to ISO 9000 & QS 9000: ISO : 9001 by QACA
TS 16949 by QACA

Allied Auto Tech (International) Pvt. Ltd. 5/36 Kirtinagar Industrial Area New Delhi- 110015

SSI/Large & Medium/Etc.: SSI
Products Manufactured: Engine Mountings, suspension bushes, steering & CV boots
Certification to ISO 9000 & QS 9000: ISO 9001/2008 by URS

Bar International Inc. 457-458 EPIP HSIDC Kundli Sonapat 131028

SSI/Large & Medium/Etc.: SSI
Products Manufactured: Piston rings
Certification to ISO 9000 & QS 9000: Nil

Deusch Kyosei Engineering Pvt. Ltd. A-82, Sector-57, Noida - 201301

SSI/Large & Medium/Etc.: SSI
Products Manufactured: Control Cables
Certification to ISO 9000 & QS 9000: TS 16949 by TUV

Belmont Rubber Pvt. Ltd. Plot NO. 58-B, Industrial Area NIT, Faridabad 121001

SSI/Large & Medium/Etc.: SSI
Products Manufactured: Breadings, coolant pipes, radiator air, cleaner hoses, O rings, gaskets
Certification to ISO 9000 & QS 9000: ISO/TS 16949 by URS

Vinko Auto Industries Ltd. Village Raowali, Dhogri Road P.O. Nurpur, Jalandhar - 144012

SSI/Large & Medium/Etc.: Medium
Products Manufactured: Auto belts, cogged belt, fan belts, fuel hoses, water hoses, radiator hose, hose pipe
Certification to ISO 9000 & QS 9000: ISO 9001/2008 by TUV, ISO/TS 16949:2009 by TUV

Premier Plasmotec Pvt. Ltd. Plot No. 1100, Sec 58, Faridabad- 121004 Haryana

SSI/Large & Medium/Etc.: Medium

Products Manufactured: Plastic injections, molding parts, thermostat, molding
Certification to ISO 9000 & QS 9000: ISO/TS 16949:2009 by AIB Vincotte

Belmaks Pvt. Ltd. Plot No. 125, Sector 24 Faridabad- 121006

SSI/Large & Medium/Etc.: Medium
Products Manufactured: cross members, foot board, grill, driver door, flaps, mobile crusher chassis, mtg bracket
Certification to ISO 9000 & QS 9000, ISO 9000 by TUV

Shiroki Technico India Pvt. Ltd. 406, 4th Floor, Suncity Business Tower DLF Golf Course Road Sector-54, Gurgaon - 122002

SSI/Large & Medium/Etc.: Large
Products Manufactured: Window regulator, seat adjuster and recliner
Certification to ISO 9000 & QS 9000: None

Chopra Industries Pvt. Ltd. Plot No. HB 04, Phase VI, Focal Point Ludhiana

SSI/Large & Medium/Etc.: SSI
Products Manufactured: Muffler and frame parts, sheet metal, tubular and internal sub assemblies
Certification to ISO 9000 & QS 9000: ISO/TS 16949:2009 by QA

ORDINARY MEMBERSHIP - WESTERN REGION

Jaidarshan Indocraft Pvt. Ltd. 120, G.V. M.M. Odhuv Industrial Estate Odhur, Ahmedabad - 382415

SSI/Large & Medium/Etc.: SSI
Products Manufactured: Cylinder liner, sleeves
Certification to ISO 9000 & QS 9000: ISO 9001:2008 by ISO QAR

SKS Fasteners Ltd. 1990, Ambethan Road, Rajgurunagar Chakan Pune-410501

SSI/Large & Medium/Etc.: Large
Products Manufactured: High tensile fasteners
Certification to ISO 9000 & QS 9000: ISO 9001:2008 by TUV Nord, ISO/TS 16949:2009 by TUV Nord, ISO 14001:2004 by Vincotte

Aakar Foundry Pvt. Ltd. Survey No. 341/2, Ganpati Mal Somatane Phata, Talegaon-Dabhade Tal. Maval Dist. Pune- 410506

SSI/Large & Medium/Etc.: Medium
Products Manufactured: Cooler project parts, head lamp, steer shaft
Certification to ISO 9000 & QS 9000: ISO 9001:2008 by TVS, ISO/TS 16949:2009 by TVS

Metallic Auto Liners Pvt. Ltd. Aji Industrial Estate, GIDC-II, Plot No. 330 Near Old Telephone Exchange Rajkot - 360003, Gujarat

SSI/Large & Medium/Etc.: Medium
Products Manufactured: Automotive cylinder liners and

sleeves
Certification to ISO 9000 & QS 9000: ISO 9001:2008 by TUV

Megatrend Fabcon Pvt. Ltd. 601, Satkar Complex, B/h Swagat Building CG Road, Ellisbridge, Ahmedabad

SSI/Large & Medium/Etc.: SSI
Products Manufactured: Composite floor assembly, foam parts, adhesive backed foam products, self adhesive plain foams for duct insulation
Certification to ISO 9000 & QS 9000, ISO 9001:2008 by BV

Esteem Auto Pvt. Ltd. G-1311, Metoda GIDC, Kalawad Road Rajkot - 360021

SSI/Large & Medium/Etc.: Medium
Products Manufactured: Liners, sleeves, cylinder blocks
Certification to ISO 9000 & QS 9000: ISO/TS 16949:2009 by TUV

ORDINARY MEMBERSHIP - EASTERN REGION

New Engineering Works C-90-91-92, 2nd Phase, Industrial Area Adityapur, Jamshedpur

SSI/Large & Medium/Etc.: SSI
Products Manufactured: Socket, connectors, elbows, tee, adapter, connector banjo, plug threaded, cylinders, torque plates, sealing plug, voss
Certification to ISO 9000 & QS 9000: ISO/TS 16949:2009 by CERMET

ASSOCIATE MEMBERSHIP - WESTERN REGION

Grind Master Machines Pvt. Ltd. B 10/11/14, Near Railway Station MIDC Aurangabad- 431005

Product / Services: Micro finishing machines, polishing of shock absorber parts, polishing of steering, robotic fitting of iron and aluminium castings
Certification to ISO 9000 & QS 9000: ISO 9001:2008 by TUV

ORDINARY MEMBERSHIP - SOUTHERN REGION

Reydel Automotive India Pvt. Ltd. Keelakarnai Vil Malrosapuram Post Chengalpattu - 603204

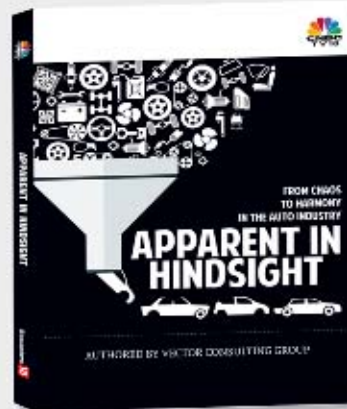
SSI/Large & Medium/Etc.: Large
Products Manufactured: Instrument panel, door panel, bumper, claddings
Certification to ISO 9000 & QS 9000: NA

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