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# *Export-Import analysis of Indian auto-component industry*

*View: 6M FY 18 (Apr-Sep)*

Prepared for ACMA

*Strictly private  
and confidential*

*January 2019*



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# Contents

<b>Executive Summary FY-18</b>		<b>3</b>
<b>Executive Summary 6M:FY-19</b>		<b>9</b>
<b>Chapter wise detailed analysis</b>		<b>18</b>
1	Chapter 40	19
2	Chapter 73	20
3	Chapter 84	21
4	Chapter 85	22
5	Chapter 87	23
6	Chapter 90	24
7	Chapter 70,72,68,83,91 & 94	25

## ***To navigate this report on-screen (in pdf format)***

From any page – click on the section title in the header navigation bar

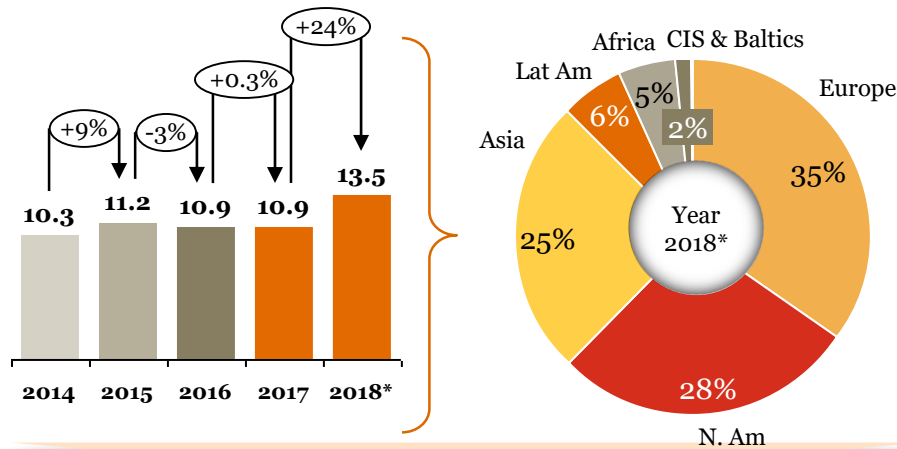
From this Contents page – click on the title of the section or sub-section

From the contents listing on any section divider – click on the title of the sub-section

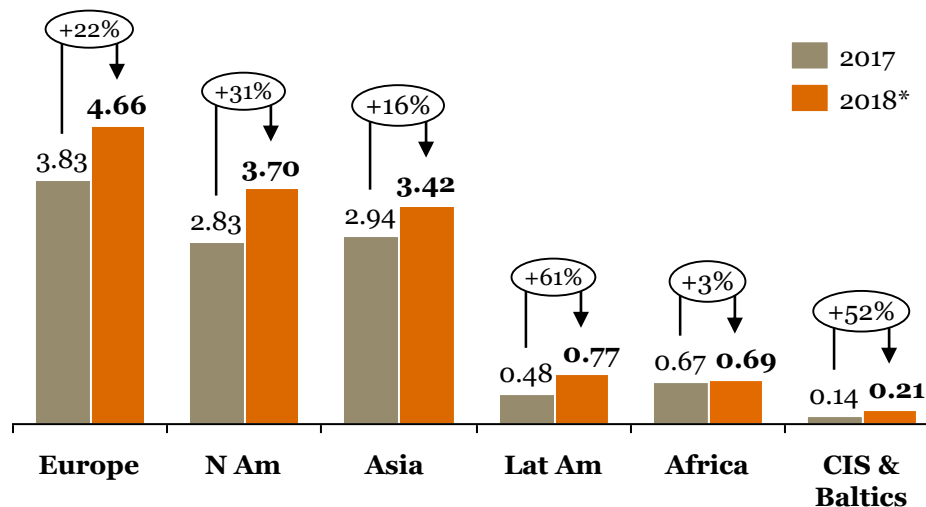
# *Executive Summary FY-18*

## Overview of “Exports” for Indian auto component industry in FY 18

Total Exports \$ Bn

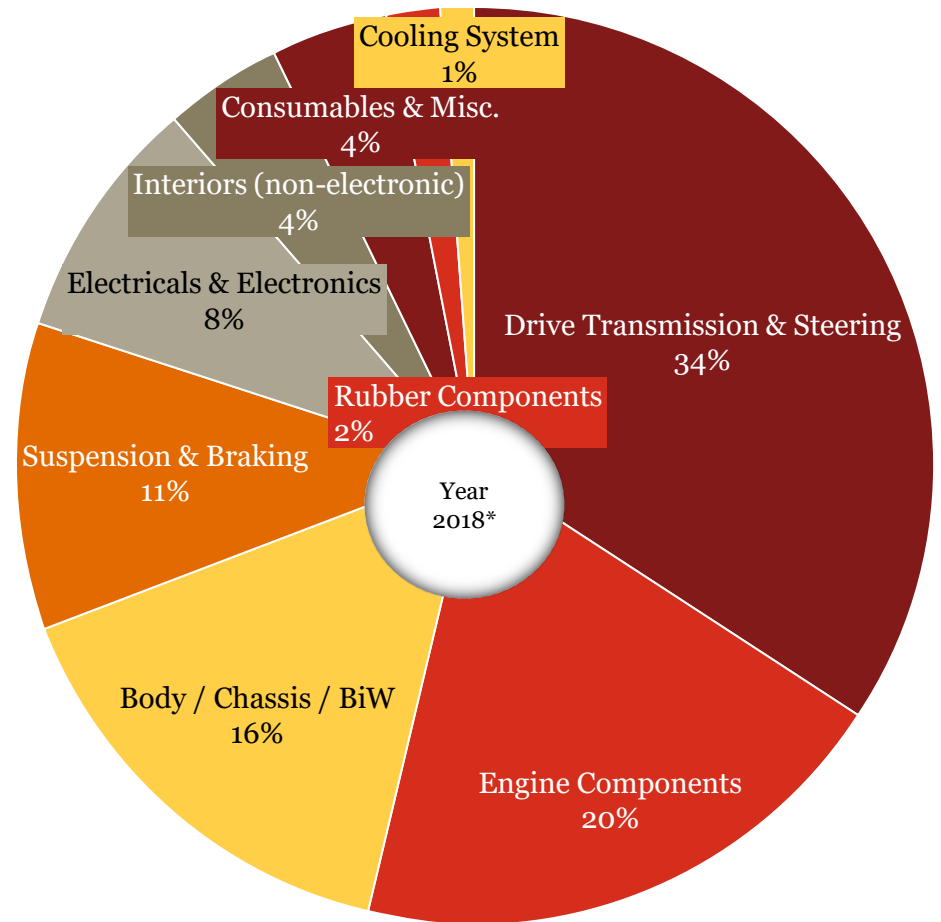
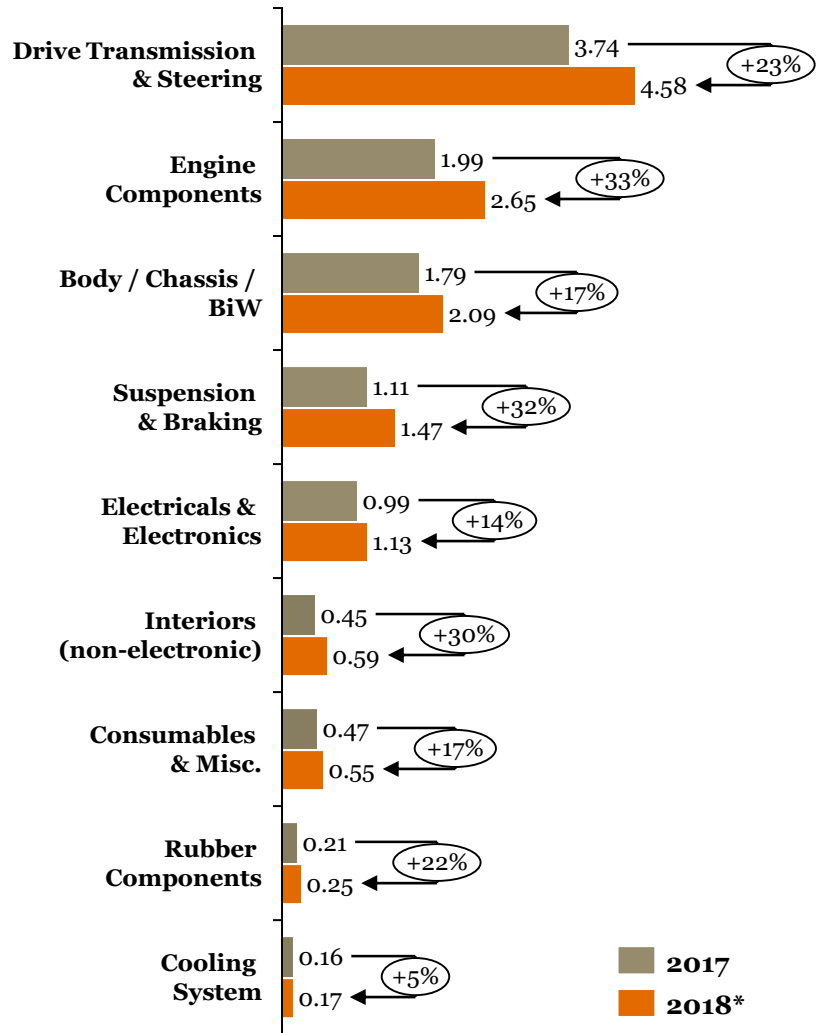


- Although, Europe was the highest value export destination, the increase in exports to N. America was substantial. The overall increase in exports this FY (Y-o-Y) has been unprecedented.
- **‘Engine, transmission and steering parts’** saw substantial export growth compared to last FY and contributed ~54% of the overall auto component exports from India; the rest ~46% is contributed by the segments such as chassis, bumpers, rubber products etc.
- Increasing exports is a testimony of the fact that Indian automotive components manufacturers are increasingly penetrating the global supply chain



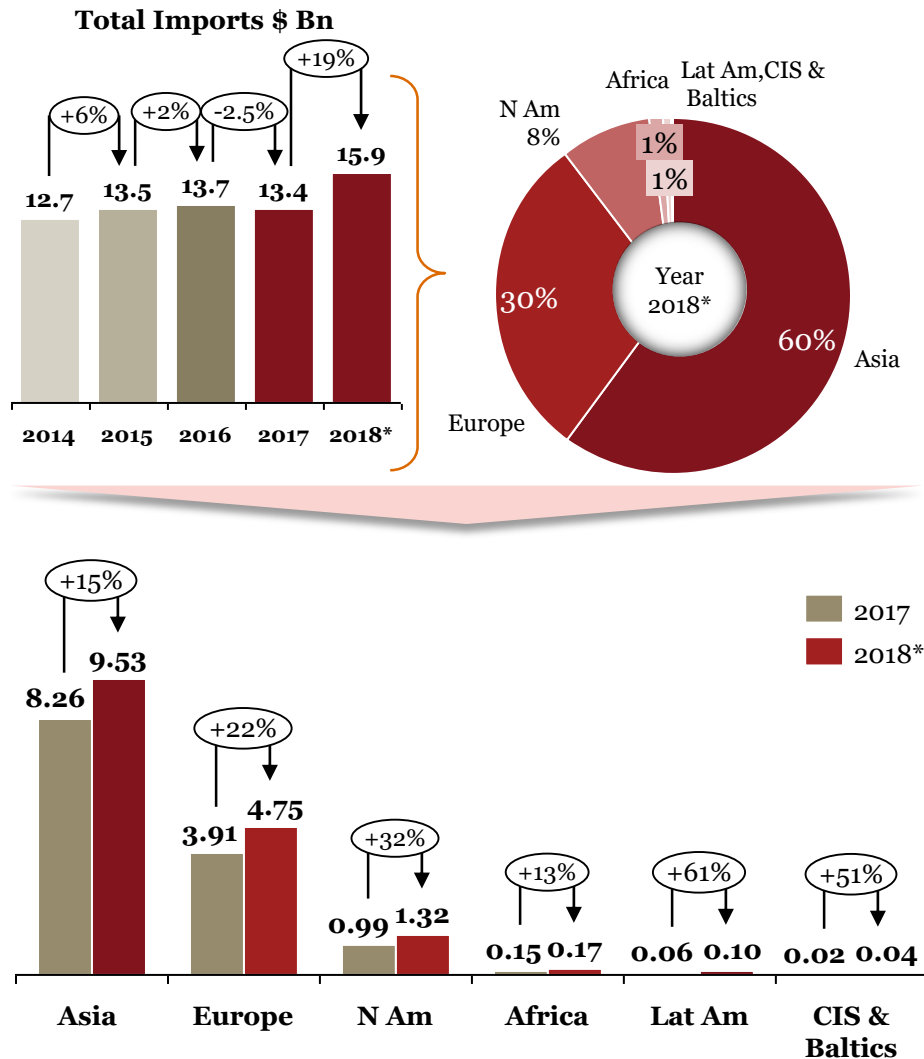
All periods mentioned are FY  
\*For 219 HS codes

## Segmentation by product type: Exports (FY-o-FY)



All periods mentioned are FY  
\*For 219 HS codes

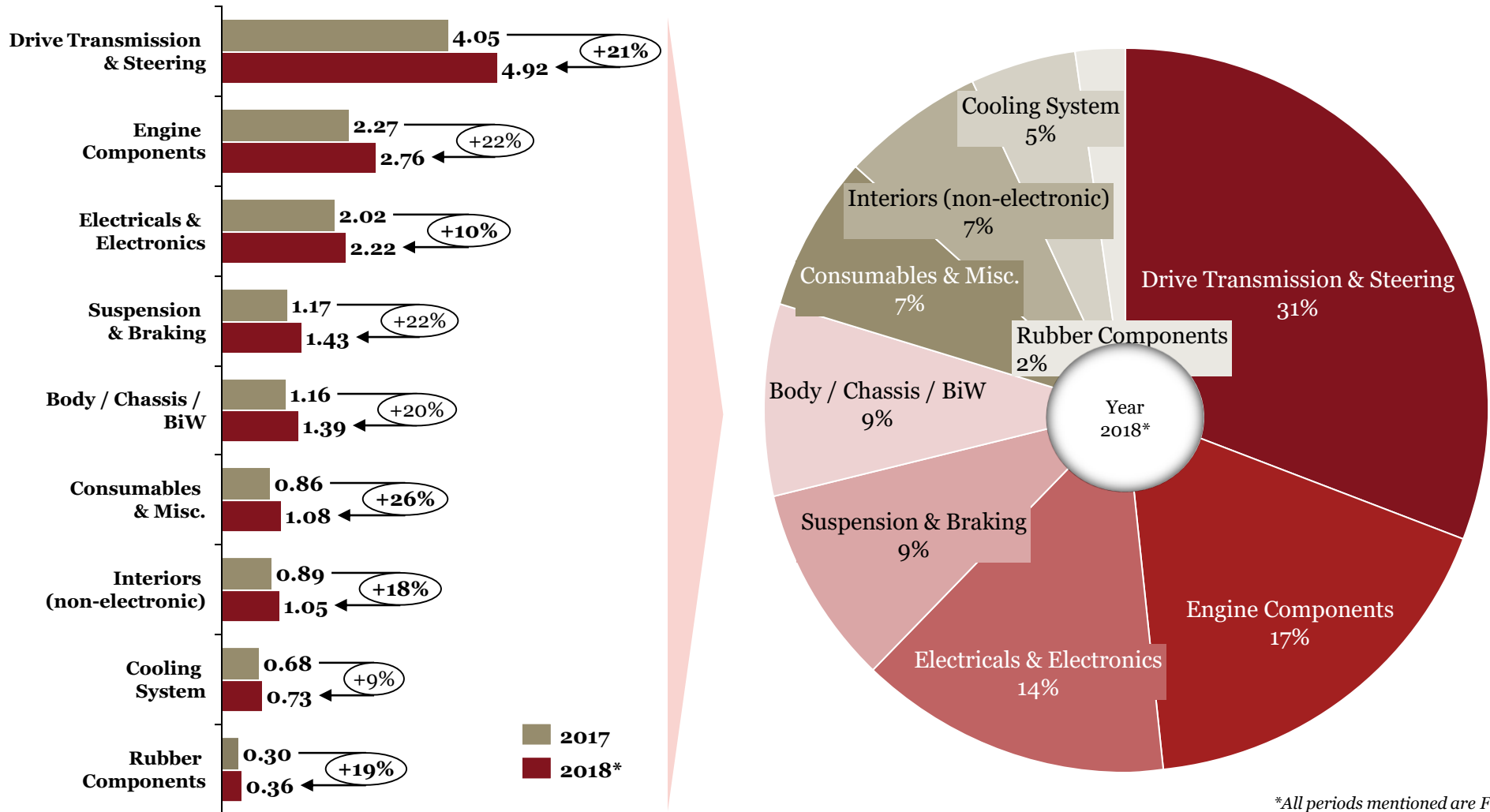
## Overview of “Imports” for Indian auto component industry in FY 18



- Increase in exports outweighed the increase in imports, which shows a positive development from the perspective of domestic automotive component players
- The fiscal deficit decreased by ~7% compared to last FY.
- **Engine, transmission, steering and suspension parts account for > 50%** of overall auto-components being imported
- Imports from countries such as China, Japan and Germany has increased proportionally
- **Engine, transmission, steering and suspension parts** recorded substantial increase in the imports (~22% increase)

\*All periods mentioned are FY  
\*For 219 HS codes

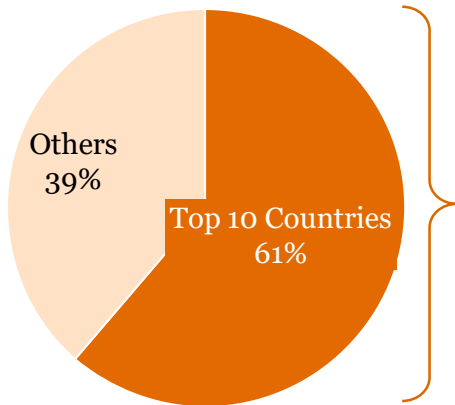
## Segmentation by product type: Imports (FY-o-FY)



\*All periods mentioned are FY  
\*For 219 HS codes

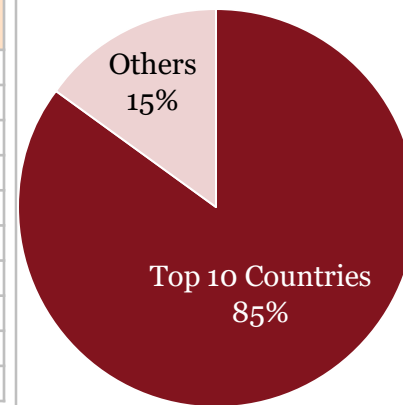
## Key highlights of “Exports” & “Imports” in FY 18

Exports - To Countries (\$ Mn), 2018\*

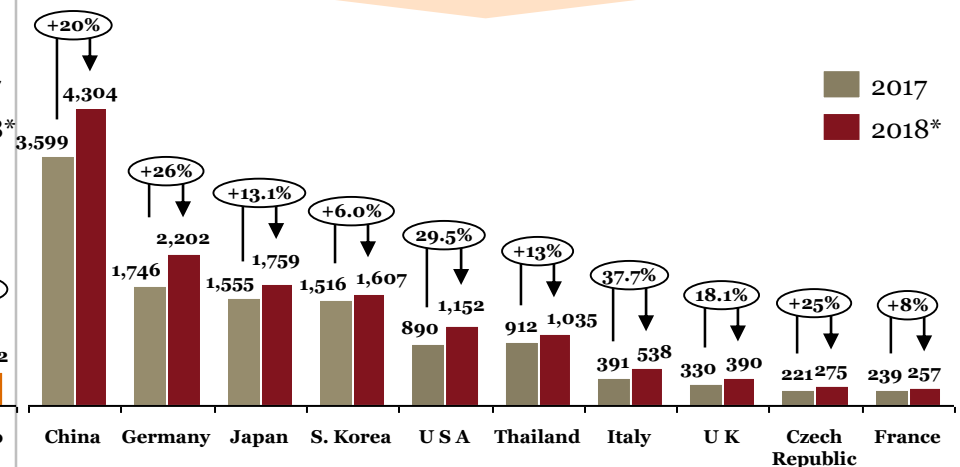
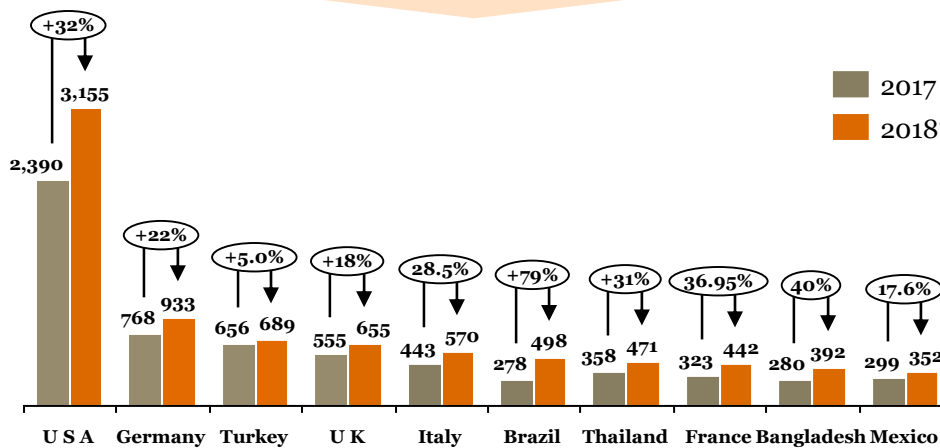


To 10 Countries	Share of Ex-FY18
U S A	23%
Germany	7%
Turkey	5%
U K	5%
Italy	4%
Brazil	4%
Thailand	3%
France	3%
Bangladesh	3%
Mexico	3%

Imports - To Countries (\$ Mn), 2018\*



To 10 Countries	Share of Im-FY18
China	27%
Germany	14%
Japan	11%
S. Korea	10%
U S A	7%
Thailand	6%
Italy	3%
U K	2%
Czech Republic	2%
France	2%



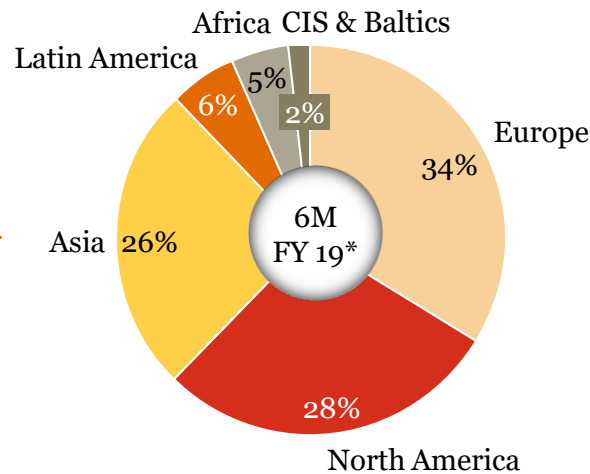
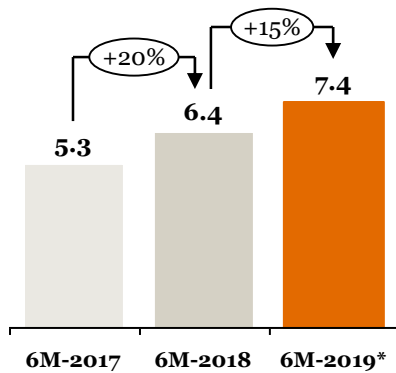
\*For 219 HS codes ; All periods mentioned are FY



# ***Executive Summary 6M:FY-19***

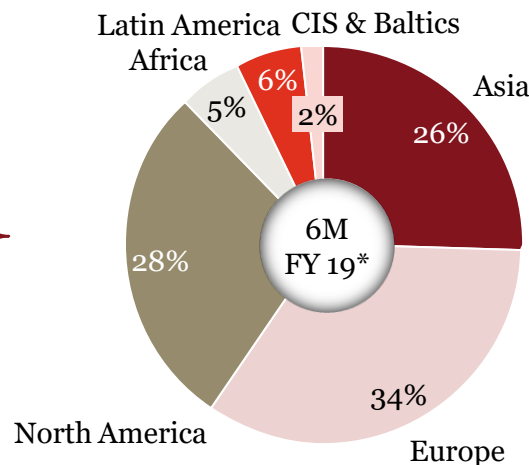
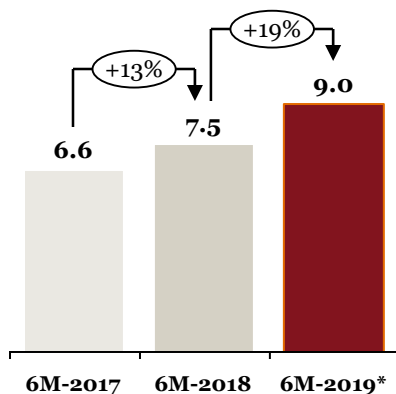
## 6M-FY 19 : Summary of 6M performance y-o-y for “Exports” and “Imports”

### Exports (\$ Bn)



- Exports (w.r.t 6M-FY 18) increased by 15%, with Europe and North America accounting for >60% of the Indian auto-component export.

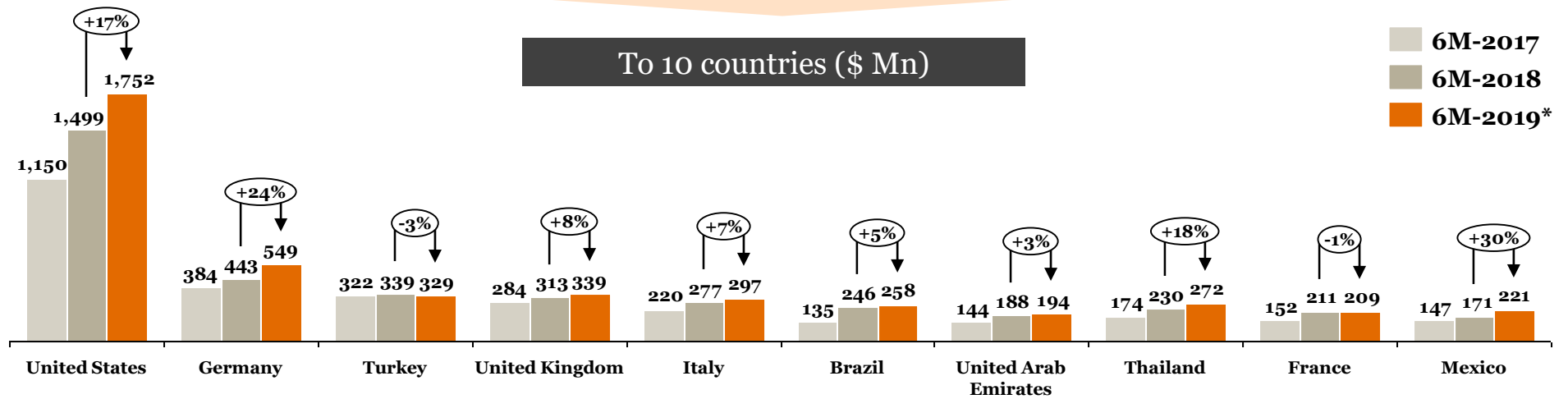
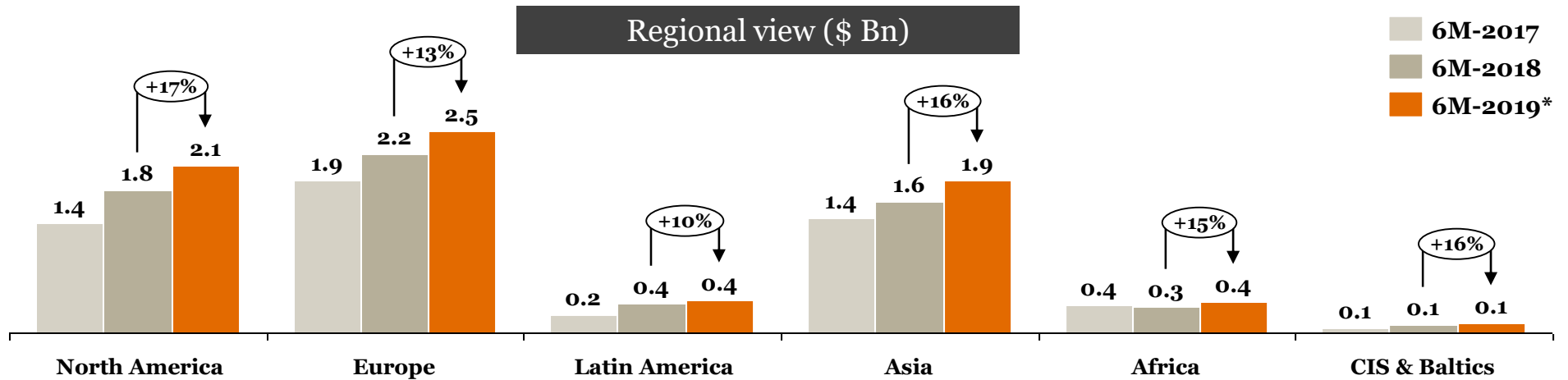
### Imports (\$ Bn)



- Imports increased by ~19%, with Europe and North America accounting for >60% of the Indian auto-component export.
- China and S. Korea dominates the imports Asian imports in to India

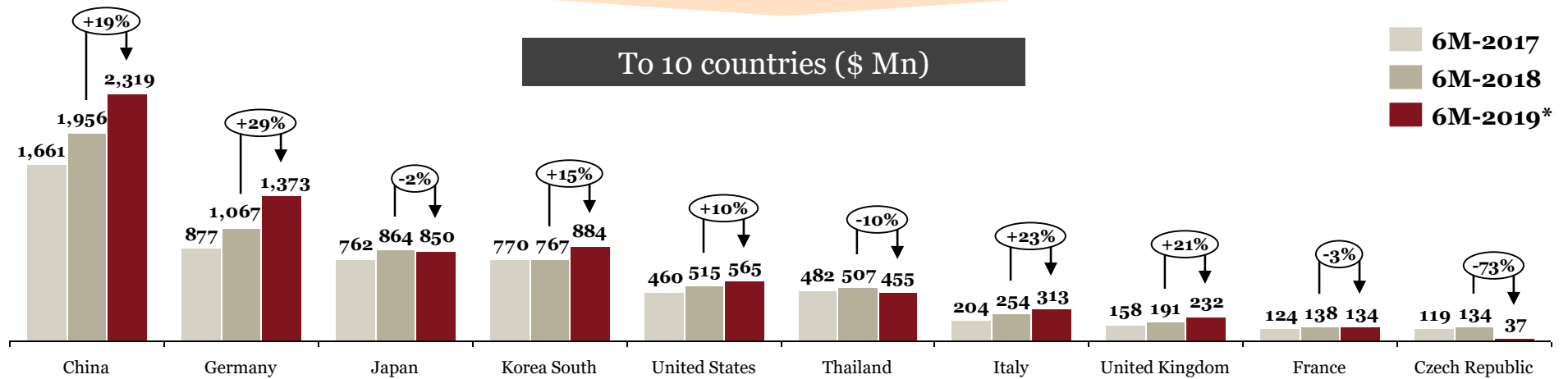
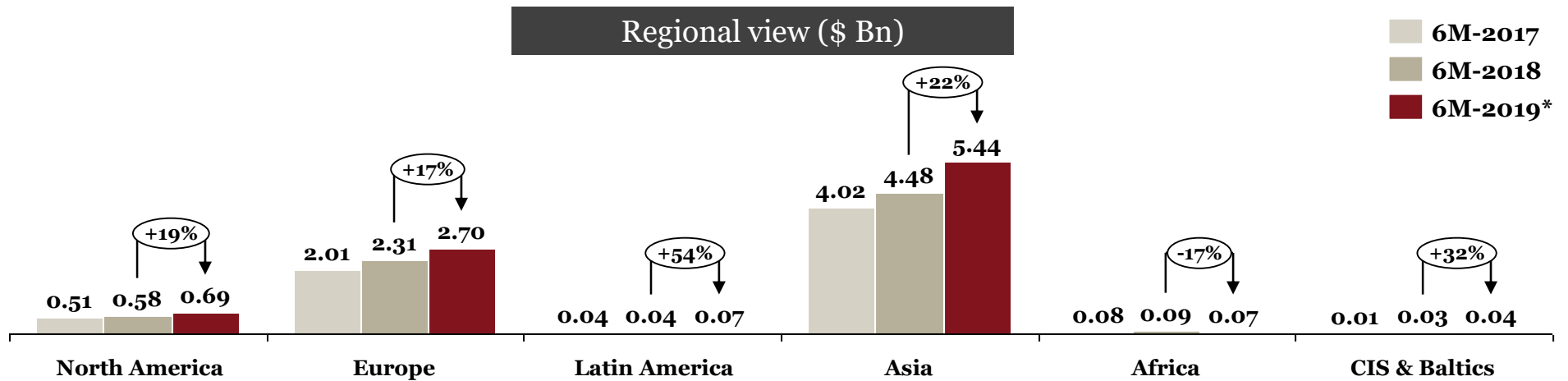
Total \*219 HS Codes \*All periods mentioned are FY

## 6M-FY 17 vs. 6M-FY 18 vs. 6M-FY 19 Exports



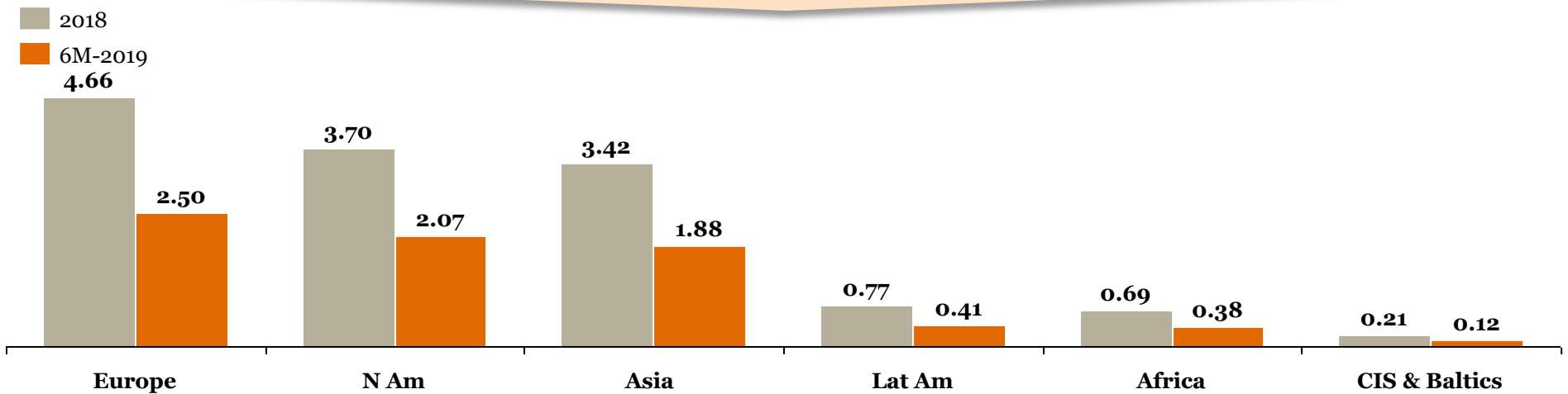
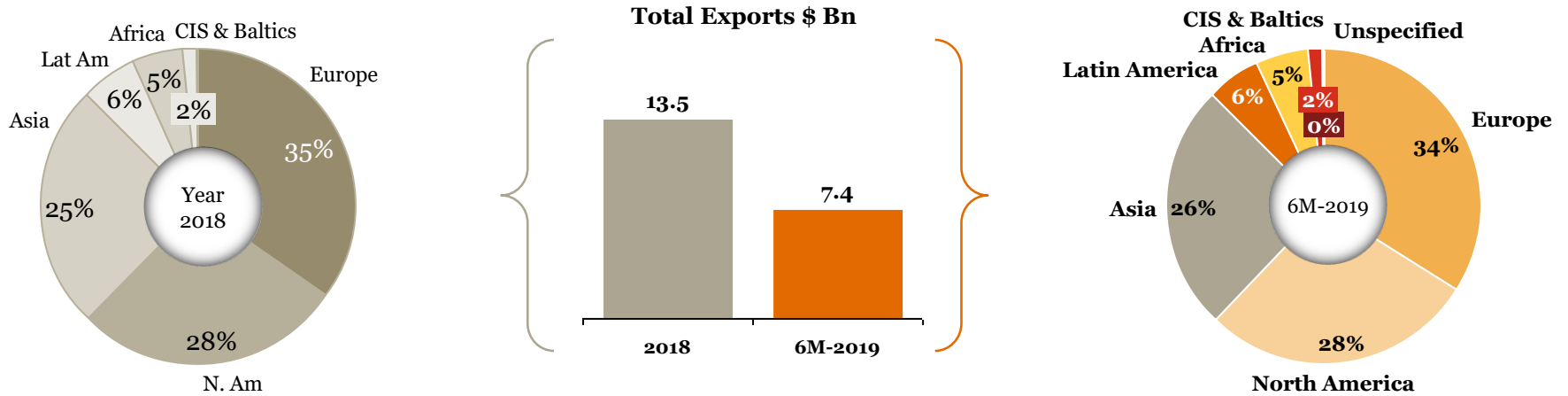
Total \*219 HS Codes \*All periods mentioned are FY

## 6M-FY 17 vs. 6M-FY 18 vs. 6M-FY 19 Imports



Total \*219 HS Codes \*All periods mentioned are FY

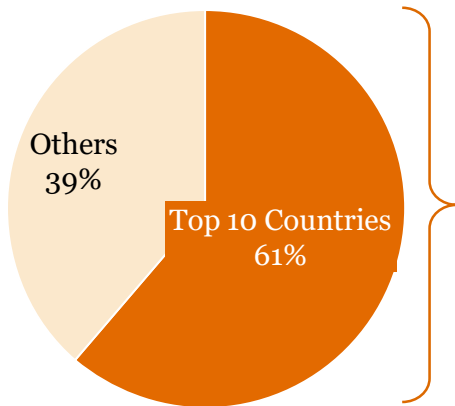
## Overview of “Exports” for Indian auto component industry in 6M-FY 19



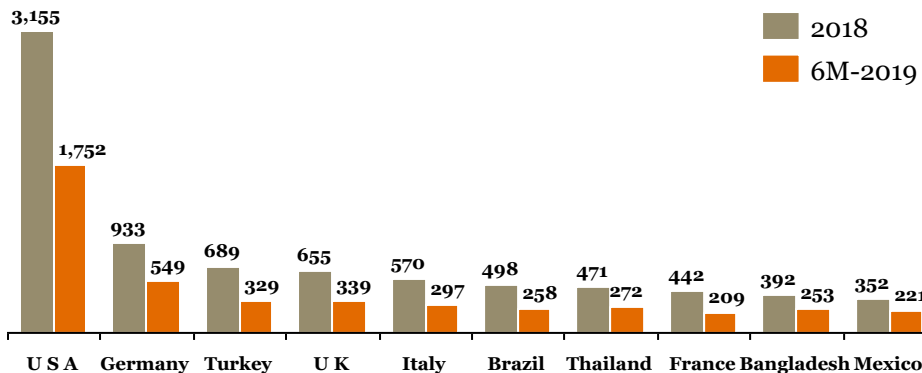
\*All periods mentioned are FY

## Key highlights of “Exports” in 6M-FY 19

To Countries (\$ Mn), 6M-FY 19



To 10 Countries	Share of Ex 6M-FY 19
U S A	24%
Germany	7%
U K	5%
Turkey	4%
Italy	4%
Thailand	4%
Brazil	3%
Bangladesh	3%
Mexico	3%
France	3%

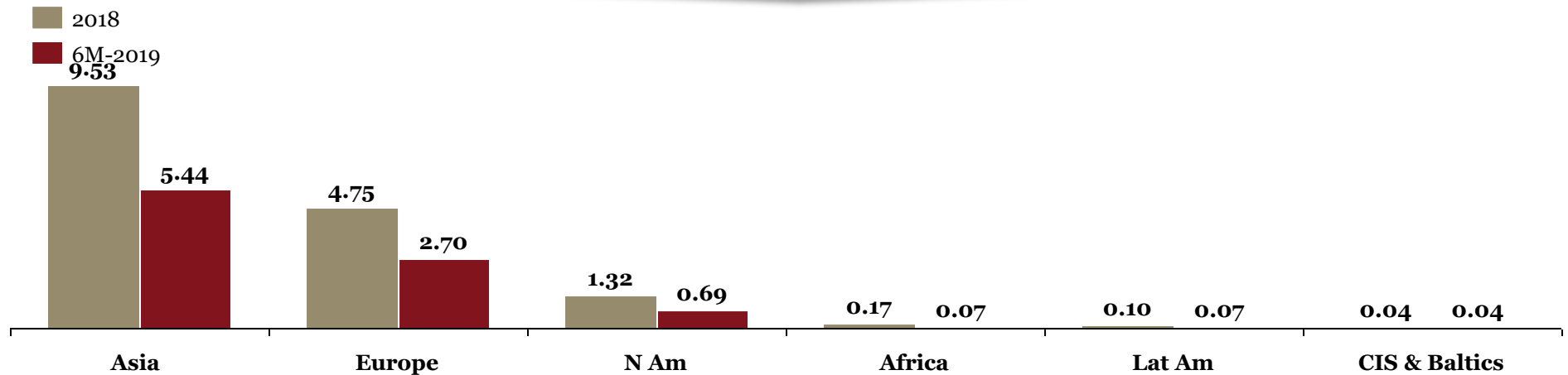
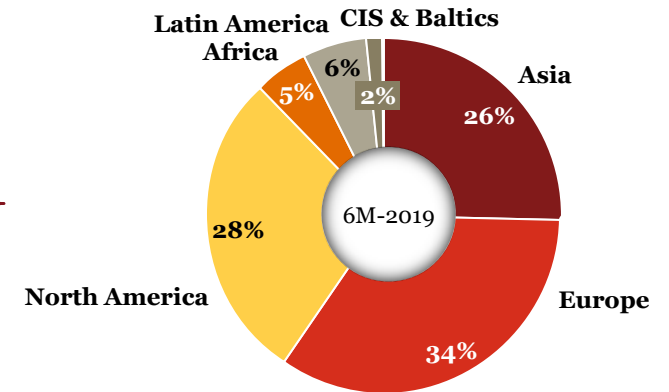
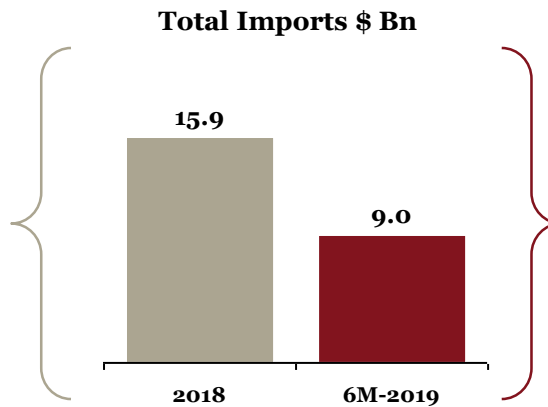
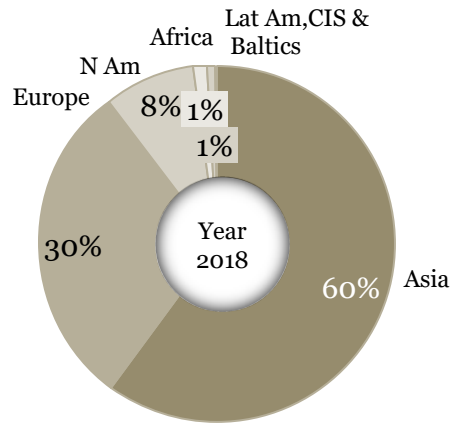


To HS codes (\$ Mn), 6M-FY 19

HS codes	Value \$ Mn	Description
<b>87089900</b>		
U S A	304.81	Other: Motor vehicle parts (Reservoir for Hydraulic Power Steering Systems+Steering Gear Systems and Parts)
Turkey	105.93	
Brazil	87.81	
<b>73269099</b>		
U S A	145.3	All Other Articles Of Iron/Steel Nes Forged or stamped but not further worked
Germany	22.88	
U Arab Emts	20.65	
<b>87083000</b>		
U S A	99.52	Brakes and servo-brakes; parts thereof
Germany	31.24	
U K	16.35	
<b>84834000</b>		
U S A	100.83	Gears and gearing, other than toothed wheels, chain sprockets and other transmission elements presented separately; ball or roller screws; gear boxes and other speed changers, including torque converters
China	18.21	
Italy	17.75	
<b>84099990</b>		
U S A	63.28	Other parts of diesel engine: Other
U K	29.03	
Italy	16.43	
<b>87085000</b>		
U S A	68.41	Drive-axles with differential, whether or not provided with other transmission components, non-driving axles; parts thereof
Turkey	22.41	
Italy	15.91	
<b>87060042</b>		
Bangladesh	73.23	For the motor vehicles of heading 8704:For vehicles, other than petrol driven
Indonesia	18.18	
Nepal	12.52	

Total \*213 HS Codes \*All periods mentioned are FY

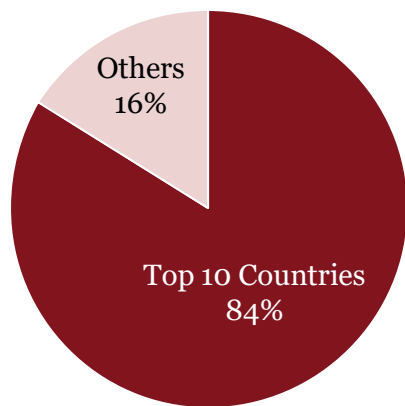
## Overview of “Imports” for Indian auto component industry in 6M-FY 19



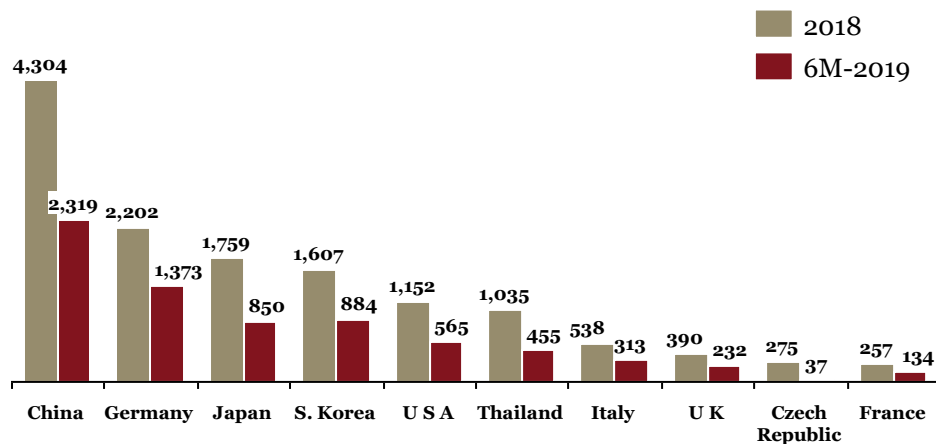
\*All periods mentioned are FY

## Key highlights of “Imports” in 6M-FY 19

**To Countries (\$ Mn), 6M-FY 19**



To 10 Countries	Share of Im 6M-FY19
China	26%
Germany	15%
S. Korea	10%
Japan	9%
U S A	6%
Thailand	5%
Thailand	5%
Italy	3%
U K	3%
France	1%



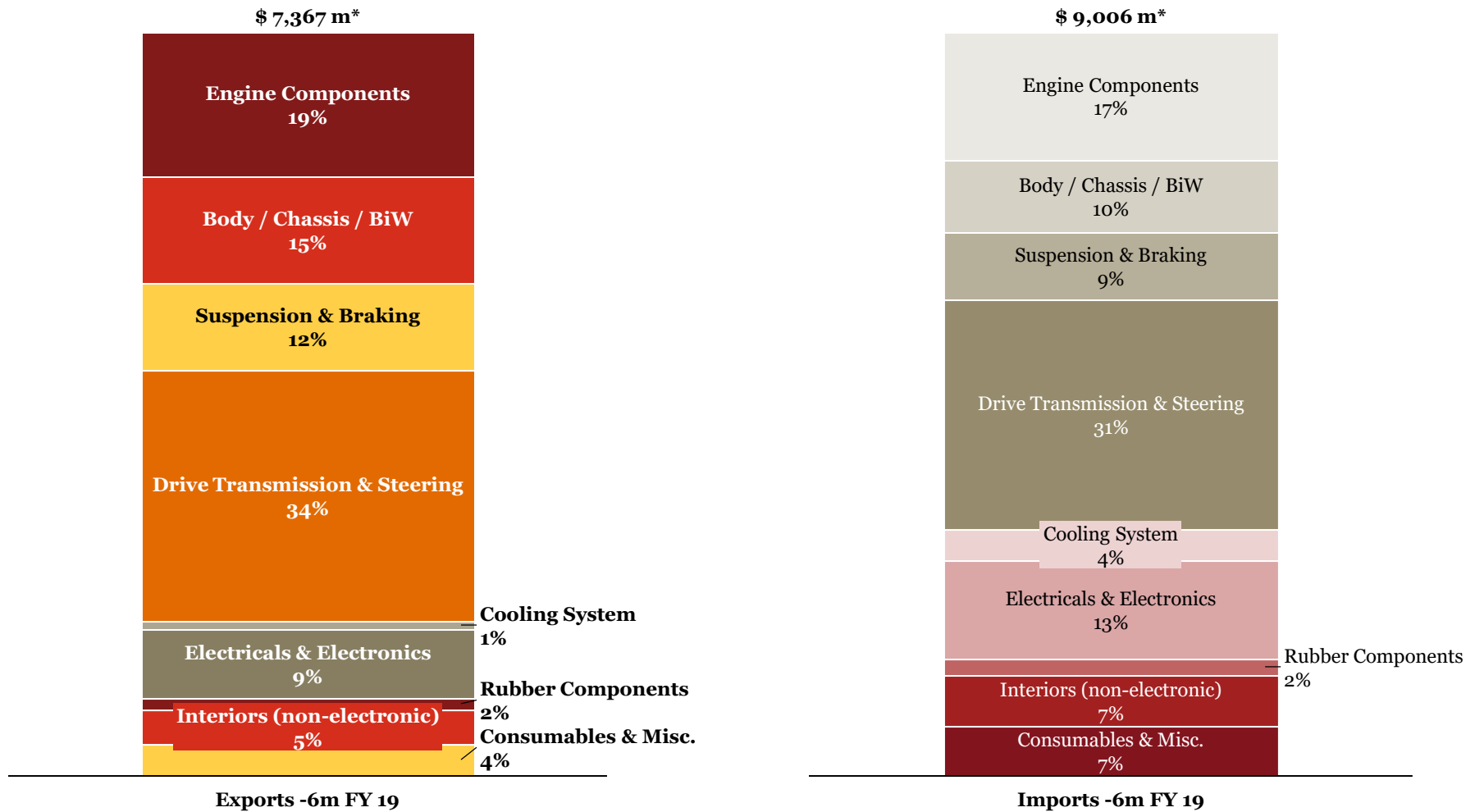
**To HS codes (\$ Mn), 6M-FY 19**

HS codes	Value \$ Mn	Description
<b>87089900</b>		
U S A	304.81	Other: Motor vehicle parts (Reservoir for Hydraulic Power Steering Systems+Steering Gear Systems and Parts)
TURKEY	105.93	
BRAZIL	87.81	
<b>73269099</b>		
U S A	145.3	All Other Articles Of Iron/Steel Nes Forged or stamped but not further worked
GERMANY	22.88	
U ARAB EMTS	20.65	
<b>87083000</b>		
U S A	99.52	Brakes and servo-brakes; parts thereof
GERMANY	31.24	
U K	16.35	
<b>84834000</b>		
U S A	100.83	Gears and gearing, other than toothed wheels, chain sprockets and other transmission elements presented separately; ball or roller screws; gear boxes and other speed changers, including torque converters
CHINA	18.21	
ITALY	17.75	
<b>84099990</b>		
U S A	63.28	Other parts of diesel engine: Other
U K	29.03	
ITALY	16.43	
<b>87085000</b>		
U S A	68.41	Drive-axles with differential, whether or not provided with other transmission components, non-driving axles; parts thereof
TURKEY	22.41	
ITALY	15.91	
<b>87060042</b>		
BANGLADESH PR	73.23	For the motor vehicles of heading 8704:For vehicles, other than petrol driven
INDONESIA	18.18	
NEPAL	12.52	

\*All periods mentioned are FY



## Segmentation by product type: Exports and Imports (6m-o-6m)



*\*Differences due to rounding off*

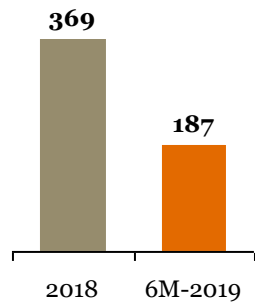
# *Chapter wise detailed analysis*

<b>Chapter wise detailed analysis</b>		<b>18</b>
1	Chapter 40	19
2	Chapter 73	20
3	Chapter 84	21
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5	Chapter 87	23
6	Chapter 90	24
7	Chapter 70,72,68,83,91 & 94	25

## Chapter 40

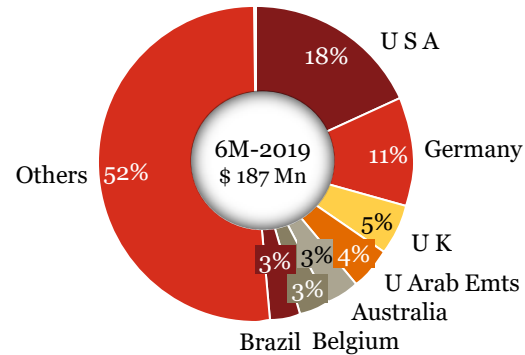
### Rubber and articles

#### Exports (\$ Mn)



\*All periods mentioned are FY

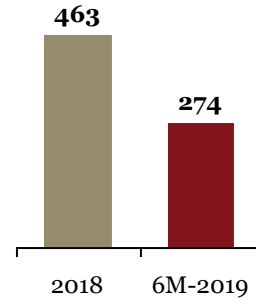
#### Exports-To Countries (\$ Mn, %)



#### To 3 Export Items

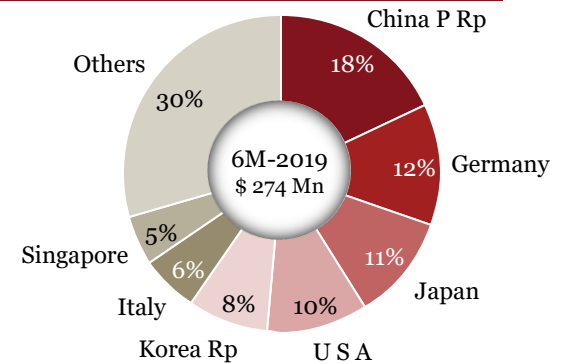
HS Codes	Description	Value (\$ Mn)	Country	Value (\$ Mn)
40169990	Others : Arcticles of Vulcanized Rubber other than hard rubber	30	Germany	13.95
			USA	11.93
			Poland	4.61
40093100	Tubes, Pipes and hoses of vulcnised rubber other than hard rubber: Without fitting	13	USA	9.36
			U K	2.26
			Belgium	1
40092100	Reinforced or otherwise combined only with metal: without fittings	12	USA	5.68
			Belgium	3.26
			China	3.04

#### Imports (\$ Mn)



\*All periods mentioned are FY

#### Imports-To Countries (\$ Mn, %)



#### To 3 Import Items

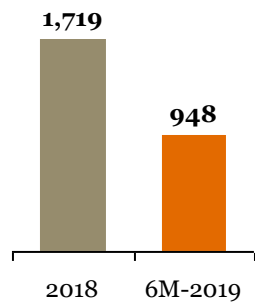
HS Codes	Description	Value (\$ Mn)	Country	Value (\$ Mn)
40169990	Others : Arcticles of Vulcanized Rubber other than hard rubber	41	China	20.15
			Korea	10.58
			Japan	10.38
40169330	Rubber seals (Oil seals and the like)	21	Japan	7.52
			Germany	7.02
			USA	6.33
40169340	Gaskets	12	USA	5.57
			China	4.07
			Italy	2.56

\*All periods mentioned are FY

## Chapter 73

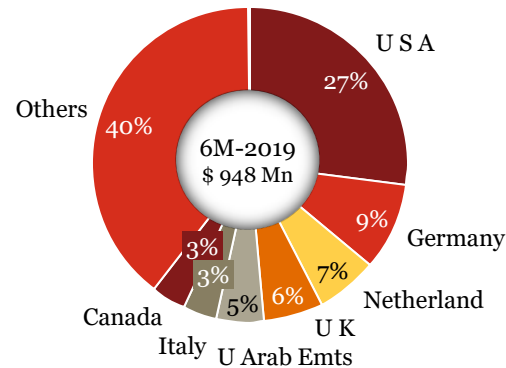
### Articles of iron or steel

#### Exports (\$ Mn)

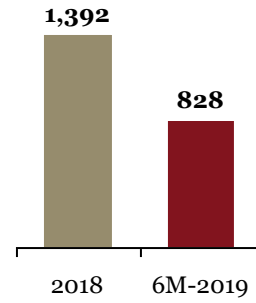


\*All periods mentioned are FY

#### Exports-To Countries (\$ Mn, %)

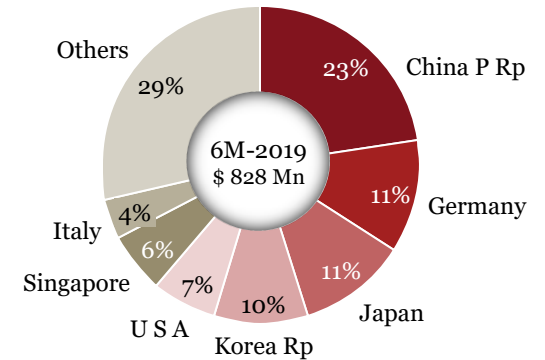


#### Imports (\$ Mn)



\*All periods mentioned are FY

#### Imports-To Countries (\$ Mn, %)



#### To 3 Export Items

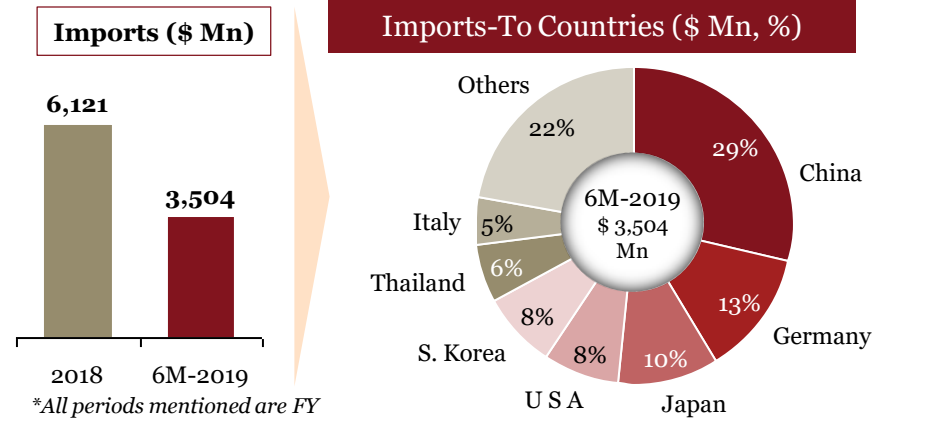
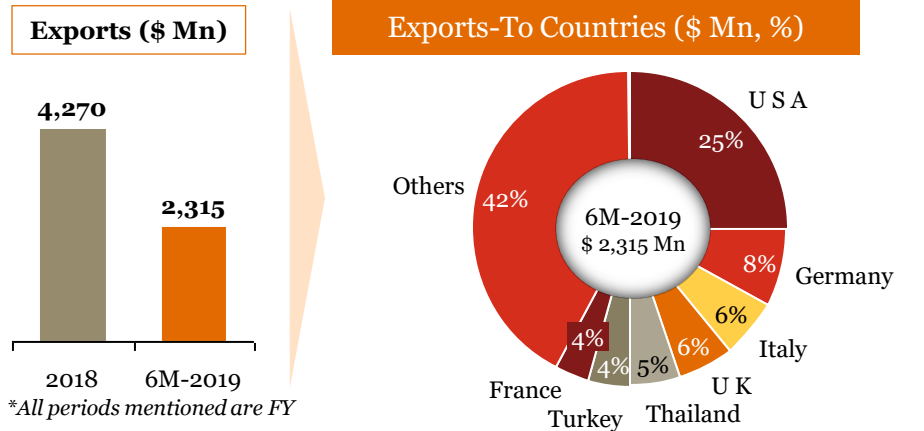
HS Codes	Description	Value (\$ Mn)	Country	Value (\$ Mn)
73269099	All Other Articles Of Iron/Steel Nes Forged or stamped but not further worked	189	U S A	145.3
			Germany	22.88
			U Arab Emts	20.65
73181500	Threaded articles : Other screws and bolts, whether or not with their nuts or washers	63	Germany	24.86
			Netherland	24.05
			U K	14.23
73261910	For automobiles and earth moving equipments	51	U S A	23.38
			Mexico	15.96
			Germany	11.42

#### To 3 Import Items

HS Codes	Description	Value (\$ Mn)	Country	Value (\$ Mn)
73269099	All Other Articles Of Iron/Steel Nes Forged or stamped but not further worked	145	China	93.56
			Japan	25.87
			Germany	25.57
73181500	Threaded articles : Other screws and bolts, whether or not with their nuts or washers	108	China	42.8
			Japan	34.09
			Germany	31.33
73182990	Other	29	China	10.43
			Germany	9.61
			Korea	9.17

## Chapter 84

Machinery and mechanical appliances, electrical equipment, sound recorders and reproducers, television image and sound recorders. and reproducers, and parts



**To 3 Export Items**

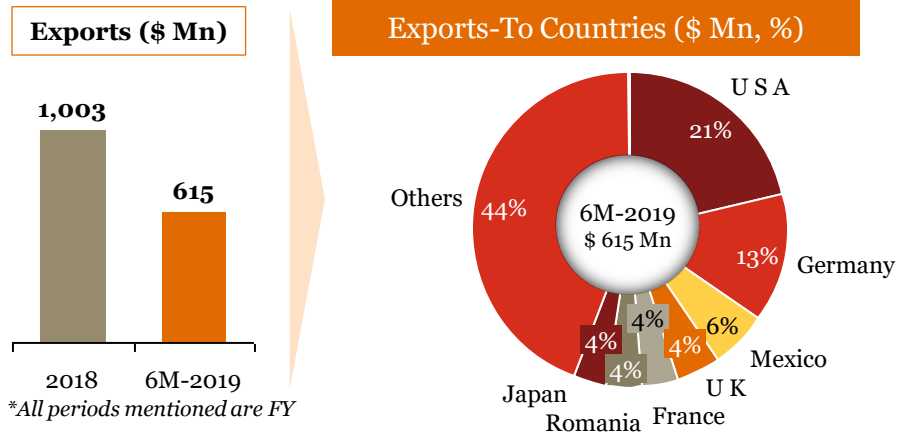
HS Codes	Description	Value (\$ Mn)	Country	Value (\$ Mn)
84834000	Gears and gearing, other than toothed wheels, chain sprockets and other transmission elements presented separately; ball or roller screws; gear boxes and other speed changers, including torque converters	137	U S A	100.83
			China	18.21
			Italy	17.75
84099990	Other parts of diesel engine: Other	109	U S A	63.28
			U K	29.03
			Italy	16.43
84082020	Engines of cylinder capacity exceeding 250 cc	95	Thailand	63.53
			Italy	24.59
			Korea	7.35

**To 3 Import Items**

HS Codes	Description	Value (\$ Mn)	Country	Value (\$ Mn)
84314990	Other : Wheels and Components for Construction and Earthmoving Equipments	171	China	108.87
			Korea	40.27
			Japan	21.63
84073410	Spark Ignition Reciprocating Piston Engine of a Cylinder for motor cars	140	Korea	51.76
			China	45.58
			South Africa	42.58
84099990	Other parts of diesel engine: Other	138	Germany	73.8
			China	33.92
			U S A	30.19

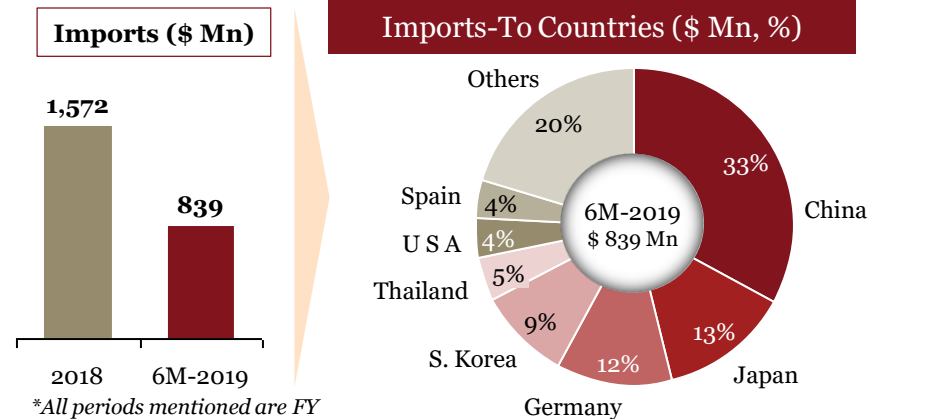
## Chapter 85

### Electrical machinery and equipment and parts thereof



**To 3 Export Items**

HS Codes	Description	Value (\$ Mn)	Country	Value (\$ Mn)
85030090	Other	93	U S A	60.09
			Mexico	19.71
			Bangladesh	13.1
85443000	Ignition wiring sets and other wiring sets of a kind used in vehicles, aircraft or ships	45	U K	20.71
			Hungary	12.01
			U S A	11.8
85114000	Starter motors and dual purpose starter-generators	40	U S A	18.2
			Germany	17.07
			Thailand	5.09



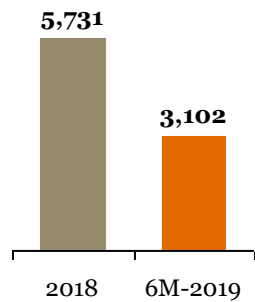
**To 3 Import Items**

HS Codes	Description	Value (\$ Mn)	Country	Value (\$ Mn)
85030090	Other	125	China	95.81
			Spain	16.29
			Germany	13.08
85013119	DC motors :Other	71	China	32.68
			Japan	31.26
			Germany	7.36
85011019	DC motor :Other	51	China	26.5
			Japan	12.7
			Korea	11.36

## Chapter 87

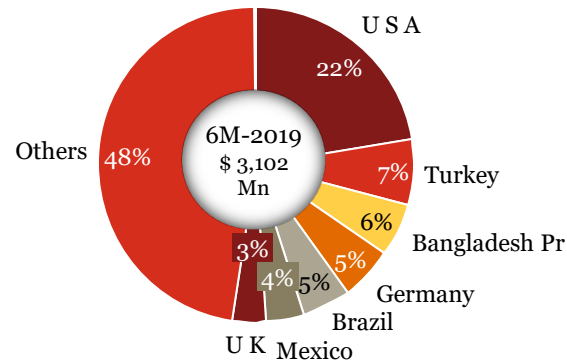
### Vehicles other than railway or tramway rolling - stock, and parts and accessories

#### Exports (\$ Mn)

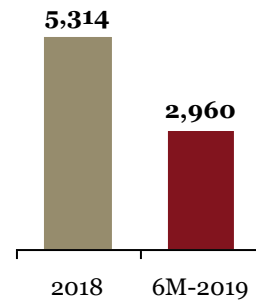


\*All periods mentioned are FY

#### Exports-To Countries (\$ Mn, %)

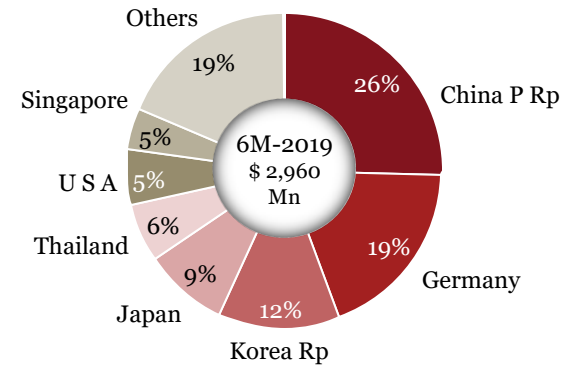


#### Imports (\$ Mn)



\*All periods mentioned are FY

#### Imports-To Countries (\$ Mn, %)



#### To 3 Export Items

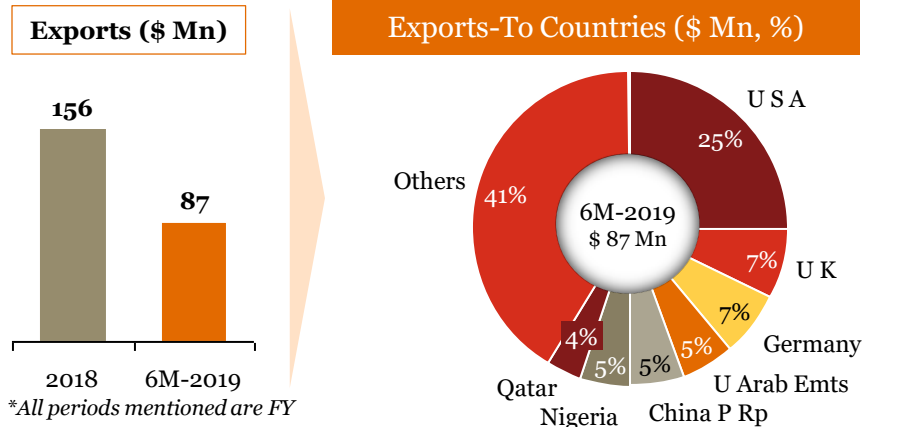
HS Codes	Description	Value (\$ Mn)	Country	Value (\$ Mn)
87089900	Other: Motor vehicle parts (Reservoir for Hydraulic Power Steering Systems+Steering Gear Systems and Parts)	499	U S A	304.81
			Turkey	105.93
			Brazil	87.81
87083000	Brakes and servo-brakes; parts thereof	147	U S A	99.52
			Germany	31.24
			U K	16.35
87085000	Drive-axles with differential, whether or not provided with other transmission components, non-driving axles; parts thereof	107	U S A	68.41
			Turkey	22.41
			Italy	15.91

#### To 3 Import Items

HS Codes	Description	Value (\$ Mn)	Country	Value (\$ Mn)
87089900	Other: Motor Vehicle Parts (Reservoir For Hydraulic Power Steering Systems+steering Gear Systems And Parts)	524	Germany	208.93
			Korea	164.49
			China	150.95
			Japan	113.07
87084000	Gear Boxes And Parts Thereof	284	Korea	112.89
			Germany	58.18
			China	202.77
87141090	Other	223	Thailand	12.42
			Japan	7.66

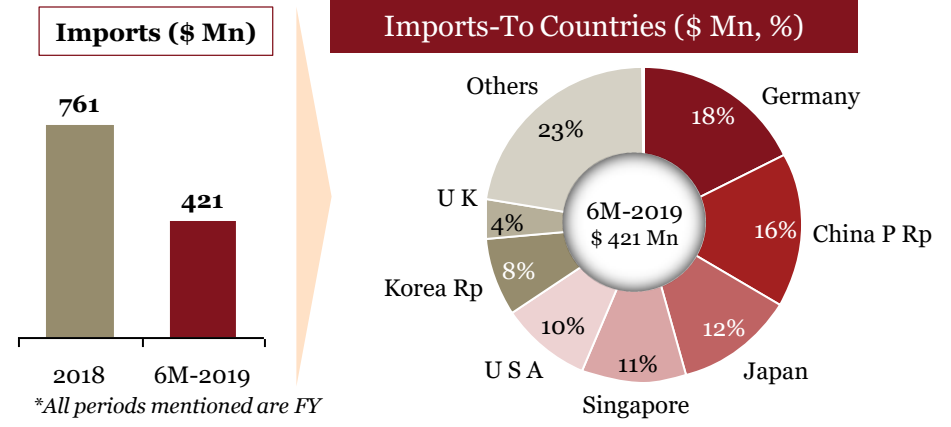
## Chapter 90

Optical, photographic, cinematographic, measuring, checking, precision, medical or surgical instruments and apparatus; parts and accessories



**To 3 Export Items**

HS Codes	Description	Value (\$ Mn)	Country	Value (\$ Mn)
90319000	Other optical instruments and appliances :Parts and accessories ( Measuring & Checking Insturments -Sensors)	23	U S A	15.59
			U K	5.36
			Germany	1.85
90328990	Other	13	U S A	5.29
			Nigeria	4.23
			U Arab Emts	3.8
90292020	Speedometers, non-electrical	2	Spain	0.8
			Colombia	0.66
			Turkey	0.46



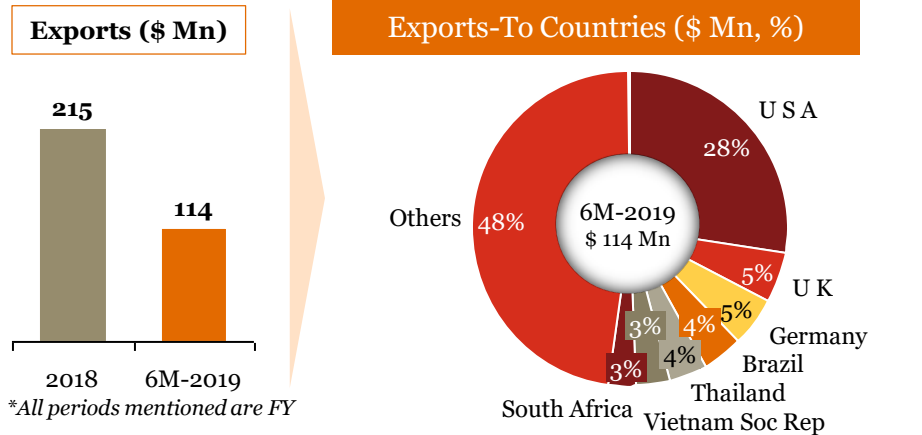
**To 3 Import Items**

HS Codes	Description	Value (\$ Mn)	Country	Value (\$ Mn)
90328990	Other	131	Germany	46.44
			China	44.76
			Singapore	40.2
			U S A	0
90319000	Other optical instruments and appliances :Parts and accessories ( Measuring & Checking Insturments - Sensors)	70	Germany	27.23
			Japan	22.98
			China	19.9
90158030	Geophysical instruments	2	Canada	0.98
			Netherland	0.45
			U Arab Emts	0.44



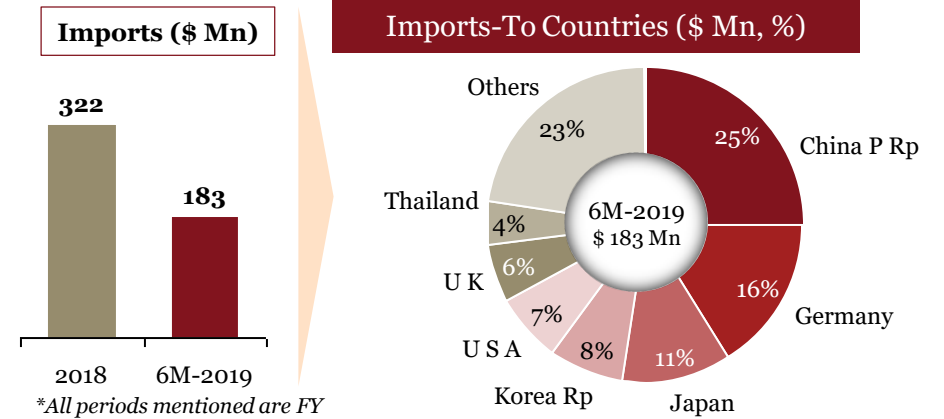
## Chapter 70,72,68,83,91 & 94

### Multiple Chapters



**To 3 Export Items**

HS Codes	Description	Value (\$ Mn)	Country	Value (\$ Mn)
83012000	Locks of a kind used for motor vehicles	13	USA	6.93
			Thailand	3.12
			U K	3.1
68138100	Brake linings and pads (Not containing Asbestos)	12	USA	10.09
			Canada	1.28
			Poland	1.02
70099200	Other : Framed	10	USA	7.93
			U K	0.83
			France	0.74



**To 3 Import Items**

HS Codes	Description	Value (\$ Mn)	Country	Value (\$ Mn)
94012000	Seats of a kind used for motor vehicles	21	Germany	8.48
			U K	6.99
			China	5.55
			Other	0.00
83012000	Locks of a kind used for motor vehicles	15	China	7.45
			Korea	3.86
			Germany	3.4
			Other	0.29
83023090	Other	12	Germany	5.7
			Korea	4.49
			China	2.23



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