SIAM

Society of Indian Automobile Manufacturers

ANNUAL REPORT 2024-25

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Mr Shailesh Chandra
President, SIAM and MD
Tata Motors Passenger Vehicles Ltd.
and Tata Passenger Electric Mobility Ltd.

President's Message

Driven by India's strong economic momentum, with GDP growth of 6.5% in FY 2024-25, the Indian Automobile industry continued its steady performance across domestic markets as well as exports. The sector's overall contribution to the Indian economy exceeded ₹20 lakh crore and has contributed to about 15% of the country's GST collections, amounting to more than ₹3.37 lakh crore, in addition to ₹0.88 lakh crore from Motor Vehicle Tax. This once again reaffirms the industry's pivotal role in economic development and employment creation. Let us take a moment to reflect on some of the key milestones achieved over the past year.

Passenger Vehicles recorded their highest-ever sales of 4.3 million units in FY 2024-25, reflecting a growth of 2% over the previous year. Exports from this category also achieved their highest-ever levels, at 0.77 million units, registering a robust 14.6% increase year-on-year.

The Two-Wheeler segment continued its recovery, with domestic sales growing by 9.1% to reach 19.6 million units, though still below the earlier peak of 21 million units achieved in FY 2019. Exports stood at 4.2 million units, up 21.4% over the previous year.

The Commercial Vehicle industry registered a marginal degrowth of (-)1.2% in domestic sales, closing the year at 9.57 lakh units. However, Exports rose sharply by 23% to 0.81 lakh units.

The Three-Wheeler industry achieved domestic sales of 7.4 lakh units, surpassing its earlier peak of 7.01 lakh units in FY 2019, with a growth of 6.7%. Exports also increased by 2.3% to 3.1 lakh units.

Transformation of the Industry: Sustainability and Decarbonisation

Alongside this growth, the industry is rapidly evolving in alignment with global and national priorities of Sustainability, Decarbonisation, and Safety. I am proud to share that the Indian Automotive Industry has taken significant strides in advancing these priorities.

- Adoption of BS VI OBD II Phase II emission standards for Two-Wheelers from April 1, 2025.
- All gasoline-powered vehicles manufactured since April 1, 2025, are now fully compliant with E20 fuel.
- Accelerated production and sales of Electric Vehicles (EVs), supported by the Government's PM E-Drive scheme.
- Enhanced vehicle safety through integration of advanced active and passive safety technologies.
- Industry support for modernising India's vehicle fleet by offering incentives for scrappage of older, polluting, and unsafe vehicles, under the Vehicle Scrappage Policy.
- Initiation of work on Hydrogen fuel-based vehicle solutions under the Government of India's Green Hydrogen Mission.

SIAM's Campaigns for Sustainable Mobility

To advance the cause of Sustainable Mobility, SIAM launched six focused Campaigns :

1. **जैविक पहल - The Bio Initiative:** Organised the 3rd edition of the International Symposium on Thriving Eco-Energy in Mobility on 21st January 2025 during Auto Expo 2025 under the aegis of Bharat Mobility Global Expo. A Decarbonisation Zone was set up at the Expo to bring together biofuel stakeholders. SIAM also showcased a Sustainable Mobility Pavilion at the 3rd India Energy Week held from 11 - 14 February 2025 and also organised a special Conference on the occasion of World Biofuel Day on 11th August 2025.
2. **विधुतीकरण - Electrification:** Partnered with the Ministry of Heavy Industries, FICCI, and FADA to organize a Seminar on 18th September 2024 to celebrate the success of the FAME scheme. We also partnered with the Ministry of Heavy Industries for the formal launch of the PM E-Drive scheme on 1st October 2024. The 4th edition of the Global Electrification Mobility was organised on 18th January 2025 during the Auto Expo 2025 along with hosting of an Electrification Pavilion at the Expo. The 2nd edition of the "Green Plate EV Rally" was organized on 9th September 2024 which showcased a diverse range of EVs across different vehicle segments.
3. **गैस गतिशीलता - Gas-Based Fuels:** In line with the Government's vision of 15% gas in India's energy mix by 2030, SIAM and PNGRB organised a Roundtable on "Gas se Gati, Bharat ki Pragati" on 28th July 2025.

4. **चक्रीयता - Recycling and Circular Economy:** Hosted the 3rd edition of the International Conference on Sustainable Circularity on 20th January 2025 during Auto Expo 2025 and showcased innovations at a dedicated Circularity Pavilion at the Expo.

5. **हरित हाइड्रोजन - Green Hydrogen:** Focused on raising awareness about hydrogen-based mobility solutions and building the foundation of India's emerging Green Hydrogen ecosystem.

6. **सुरक्षित सफर - Road Safety:** Organised the first Summit on Automotive Future Advancement in Road Safety (SAFAR) on 19th January 2025 and the 3rd Surakshit Safar Pavilion at Auto Expo 2025. These included road safety runs, simulator-based training, awareness exhibitions, competitions, and performances.

   A landmark SIAM Road Safety Online Education Program was launched on 22nd April 2025 by Hon'ble Ministers Shri Dharmendra Pradhan and Shri Nitin Gadkari. In collaboration with 1,250 Kendriya Vidyalayas, it seeks to train over 1.5 million students, fostering a safety-first mindset among the youth.

Aatmanirbharta - Deepening Localisation

SIAM members have intensified efforts toward deep localisation of components, working closely with Automotive Component Manufacturers Association of India (ACMA), Automotive Tyre Manufacturers Association (ATMA), Indian Steel Association (ISA) and The Alloy Steel Producers Association of India (ASPA), among others.

The 2nd Automotive Sourcing Conclave held on 5th December 2024 focused on "Building a Resilient Supply Chain." The Auto Expo 2025 also featured the 'Auto Aatmanirbhar Zone,' highlighting critical components where localisation has been achieved as well as areas still dependent on imports.

Auto Expo 2025 under Bharat Mobility Global Expo

Auto Expo - The Motor Show 2025, held from 17th - 22nd January 2025 under Bharat Mobility Global Expo, witnessed participation from 34 vehicle manufacturers and an impressive turnout of 8,44,000 visitors, with 90 vehicle launches.

A major highlight of the Bharat Mobility Global Expo 2025 was its inauguration by the Hon'ble Prime Minister. Hon'ble Prime Minister also visited some of the Exhibit Stalls at Auto Expo - The Motor Show, where he was accompanied by Hon'ble Ministers H.D. Kumaraswamy and Piyush Goyal.

Across its three venues-Bharat Mandapam, Yashobhoomi, and India Expo Mart, Greater Noida-the Bharat Mobility Global Expo 2025 attracted nearly 9,83,000 visitors and hosted 239 product launches.

Policy Engagements with Government

During FY 2024-25, SIAM worked closely with various ministries and policy makers, resulting in several key policy interventions :

- Exemption of certain critical grades of Steel from imposition of provisional Safeguard duty on imported steel.
- Reduction of Compensation Cess paid to Merchant Exporters by OEMs for exporting vehicles, to 0.1%.

- Prospective implementation of 22% Compensation Cess on UVs effective 26th July 2023.
- Tariff concessions in the India-UK Trade Agreement aligned with SIAM's recommendations.
- Inclusion of N2 and N3 category vehicles in PM E-Drive with a ₹500 crore allocation for E-Trucks.
- Continuity of EV subsidies post-FAME through the PM E-Drive scheme from October 2024, to maintain continuity of subsidy for electric mobility.
- Advancement of E-Three-Wheeler subsidies under PM E-Drive to November 2024.
- QCO implementation date of Polypropene materials for Moulding and extrusion were extended by Ministry of Chemicals and Fertilizers.
- Implementation of Phased Manufacturing Programme (PMP) has been extended from 1st April 2025 to 1st May 2025 for electric two-wheelers. Guidelines for PMP under PM E-Drive Scheme include allocation of one year time for BMS in e-buses and 6 months for vehicle control unit in e-buses.
- Indian Auto sector has also been exempted from the purview of Rules for 'EPR for Non-Ferrous Metals'.
- Postponement of Machinery and Electrical Equipment Safety OTR (Omnibus Technical Regulation) Order, 2024 to 1st September 2026, from the earlier notified implementation date of 28th Aug 2025.
- DGFT / DPIIT has allowed further exemption to additional 57 Tyre sizes from the requirement of BIS certification, thereby exempting them from QCO.
- Schemes for Electric Buses, Electric Trucks and Electric Ambulances, under PM E-Drive has been extended by two years till 31st March 2028, as against 31st March 2026.
- Environment Protection (End-of-Life Vehicles) Rules, 2025; Plastic Waste Management Amendment Rules, 2025 and Battery Waste Management Amendment Rules, 2025 have also been aligned with the interests of the auto industry.
- Fungibility of funds allowed for Electric 3 Wheelers under PM E-DRIVE, enabling reallocation of unutilized e-rickshaw/e-cart funds to the high-demand L5 category.

We sincerely appreciate the proactive and collaborative approach of the Government of India, State Governments, Ministries, and regulatory agencies for their continued support.

Automotive Mission Plan 2025-2047

SIAM is proud to be identified as a key stakeholder by the Ministry of Heavy Industries for formulating the Automotive Mission Plan (AMP) 2025-2047. The Plan envisions a comprehensive roadmap for the auto sector, contributing significantly to India's aspiration of becoming a Viksit Bharat by 2047.

Seven Sub-Committees have been constituted under the aegis of Ministry of Heavy Industries, coordinated by SIAM and ACMA, to draft this roadmap. The final report is expected by the end of 2025.

International Engagements

SIAM has strengthened its collaboration with industry associations in Germany, Japan, Indonesia, Nepal, UK, and Sri Lanka, while continuing active engagement with global bodies such as OICA and IMMA on regulatory harmonisation.

In October 2024, SIAM hosted its annual bilateral meeting with JAMA in Lonavala. In March 2025, SIAM led a delegation to Sri Lanka to engage with government and industry leaders, coinciding with the reopening of Sri Lanka's automotive market after nearly five years.

Society for Automotive Fitness & Environment (SAFE)

At SIAM, Road Safety continues to be at the heart of our mission. Despite persistent challenges of road accidents, our initiatives under the 5Es-Enforcement, Education, Engineering, Emergency Care, and Evaluation-aim to drive meaningful impact.

Key initiatives this year included:

- The SAFE Annual Convention, Technology Conference, and Mobility Expo (24th-25th September 2024, Bengaluru), inaugurated by the Hon'ble Chief Minister of Karnataka.
- Road safety awareness programs for school students in collaboration with Delhi Traffic Police.
- Development of six online educational modules on Road Safety to be rolled out via SIAM's Learning Management Portal for Kendriya Vidyalayas.

As I complete one year as SIAM President, I take immense satisfaction in the industry's collective progress. I express my heartfelt gratitude to the Government of India, State Governments, Ministers, Policy Makers, Senior Bureaucrats, and media partners for their consistent support.

I also deeply appreciate the contributions of the SIAM Executive Committee, Past Presidents, and all SIAM members for their enthusiastic participation, as well as the unwavering support of the SIAM Secretariat.

I am confident that the Indian Automobile Industry is poised to play a defining role in shaping India's Amrit Kaal, contributing significantly to realising the vision of a Viksit Bharat by 2047.

With warm regards,

Jai Hind
Shailesh Chandra
President, SIAM

OFFICE BEARERS

MR SHAILESH CHANDRA

President, SIAM and
Managing Director
Tata Motors Passenger Vehicles Ltd
and Tata Passenger Electric
Mobility Ltd

MR SHENU AGARWAL

Vice President, SIAM and
Managing Director & CEO
Ashok Leyland Ltd

MR SATYAKAM ARYA

Treasurer, SIAM and
CEO & Managing Director
Daimler India Commercial Vehicles
Pvt Ltd

Hon'ble Prime Minister and Senior Hon'ble Ministers at Bharat Mobility Global Expo 2025

SIAM
Society of Indian Automobile Manufacturers
Building the Nation, Responsibly.

The Society of Indian Automobile Manufacturers (SIAM) is an apex national body representing all major vehicle and vehicular engine manufacturers in India. It is a society with charitable objectives registered under the Societies Registration Act, 1860. Its objectives include enhancing the contribution of automobile industry to the growth and development of Indian economy, assisting the automobile industry to meet its social obligations and encouraging the efficiency of industry in general and automobile industry particularly in India. SIAM focuses on activities related to improvement of environment and ensuring safety and protection of automobile vehicle users and public at large. Recognising these objectives, SIAM has been granted registration under the Income Tax Act, 1961 as an institution with charitable purpose.

To meet these objectives, SIAM works closely with stakeholders in the formulation of the economic, environment and commercial policies, regulations and standards relating to automobiles. It provides economic and statistical information as well as technical and public policy services to the stakeholders on behalf of Indian Automobile Industry. It publishes Monthly Industry Statistics, Monthly Commodity Price Monitor and other periodic reports. SIAM organises seminars and workshops on the subjects of topical relevance and interest to the industry. It also carries out various public policy activities, particularly in the field of Road Safety and Environment.

SIAM works closely with various Government departments, both at Central and State level and with international bodies like International Organisation of Motor Vehicle Manufacturers (OICA), International Motorcycle Manufacturers Association (IMMA) and coordinates with other counterpart international associations.

SIAM, jointly with ACMA and CII, organises the Auto Expo - The Motor Show, an exhibition showcasing the trends in the Automobile Industry.

SIAM aims to promote Sustainable Mobility through focused initiatives and campaigns on जैविक पहल (Bio Initiative), हरित हाइड्रोजन (Hydrogen Mobility), गैस गतिशीलता (Gas based mobility), विधुतीकरण (Electrification), चक्रीयता (Circularity) and सुरक्षित सफर (Safe Journey) in alignment with Sustainable Development Goals, 2030 and Net Zero by 2070.

PERFORMANCE OF INDIAN AUTO INDUSTRY IN 2024-25

Production

The industry produced 3.10 crore vehicles in FY 2024-25 including Passenger Vehicles, Commercial Vehicles, Three Wheelers, Two Wheelers, and Quadricycles, up from 2.84 crore vehicles in FY 2023-24.

Domestic Sales

Total Passenger Vehicle sales rose to 43.02 lakh units in FY 2024-25 from 42.19 lakh units in FY 2023-24. Specifically, Utility Vehicle sales increased from 25.21 lakh units to 27.97 lakh units in FY 2024-25, and sales of Vans grew from 1.49 lakh units to 1.51 lakh units. However, Passenger Car sales declined from 15.49 lakh units to 13.53 lakh units in FY 2024-25.

Overall Commercial Vehicle sales decreased from 9.69 lakh units in FY 2023-24 to 9.57 lakh units in FY 2024-25. Sales of Medium and Heavy Commercial Vehicles remained almost flat at 3.74 lakh units while sales of Light Commercial Vehicles dropped from 5.95 lakh units to 5.83 lakh units in FY 2024-25.

Three-Wheeler sales increased from 6.95 lakh units in FY 2023-24 to 7.41 lakh units in FY 2024-25. Sales of Two Wheelers grew from 1.80 crore units in FY 2023-24 to 1.96 crore units in FY 2024-25.

Exports

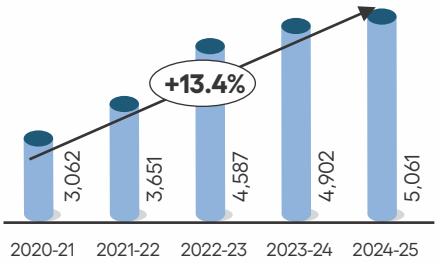
Exports saw growth across all vehicle segments; Passenger Vehicle exports rose from 6.72 lakh units in FY 2023-24 to 7.70 lakh units in FY 2024-25, Commercial Vehicle exports increased from 0.66 lakh units to 0.81 lakh units. Exports of Three-Wheelers went up from 3.00 lakh units in FY 2023-24 to 3.07 lakh units in FY 2024-25. Two-Wheeler exports also increased from 34.58 lakh units to 41.98 lakh units.

PRODUCTION

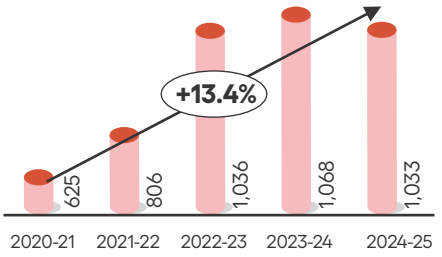
CAGR

Units in '000

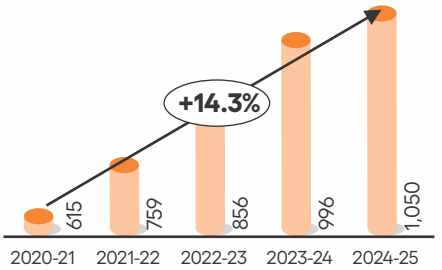
Passenger Vehicles



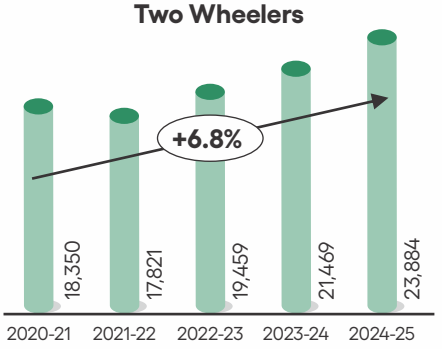
Commercial Vehicles



Three Wheelers



Two Wheelers

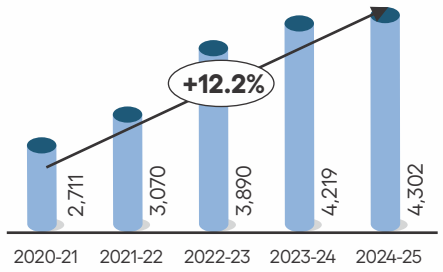


DOMESTIC SALES

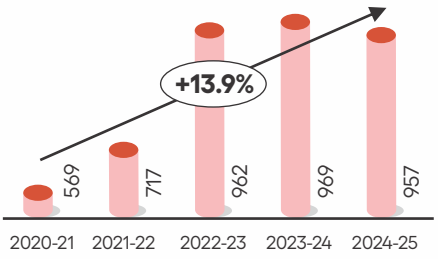
CAGR

Units in '000

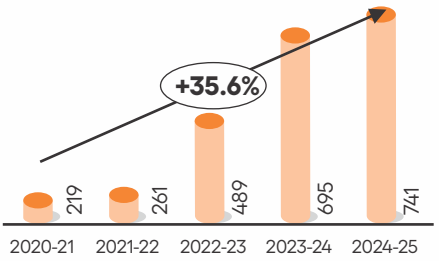
Passenger Vehicles



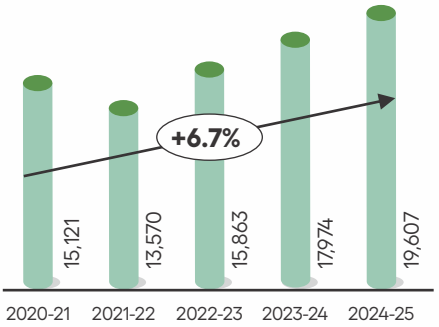
Commercial Vehicles



Three Wheelers



Two Wheelers

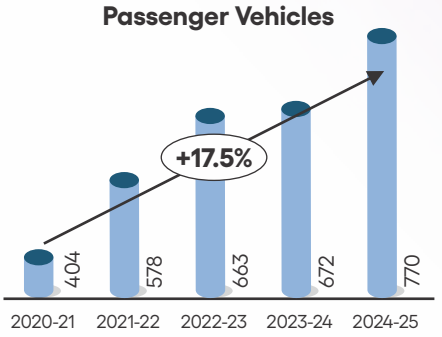


EXPORTS

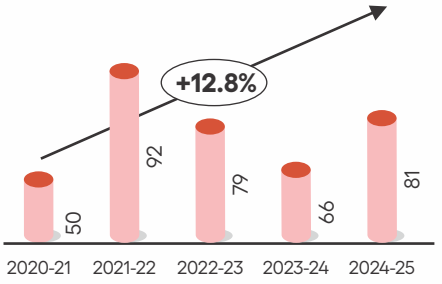
CAGR

Units in '000

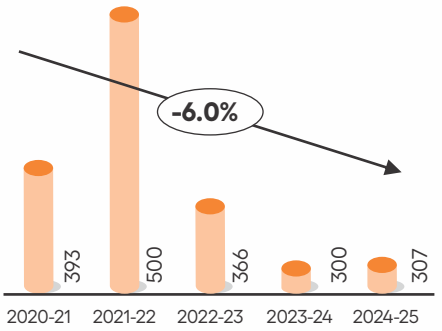
Passenger Vehicles



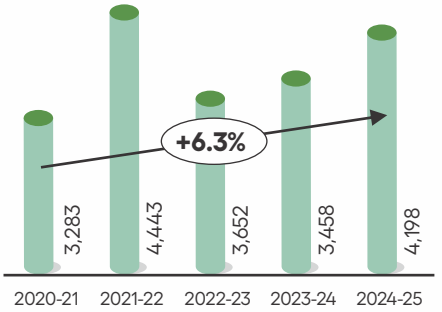
Commercial Vehicles



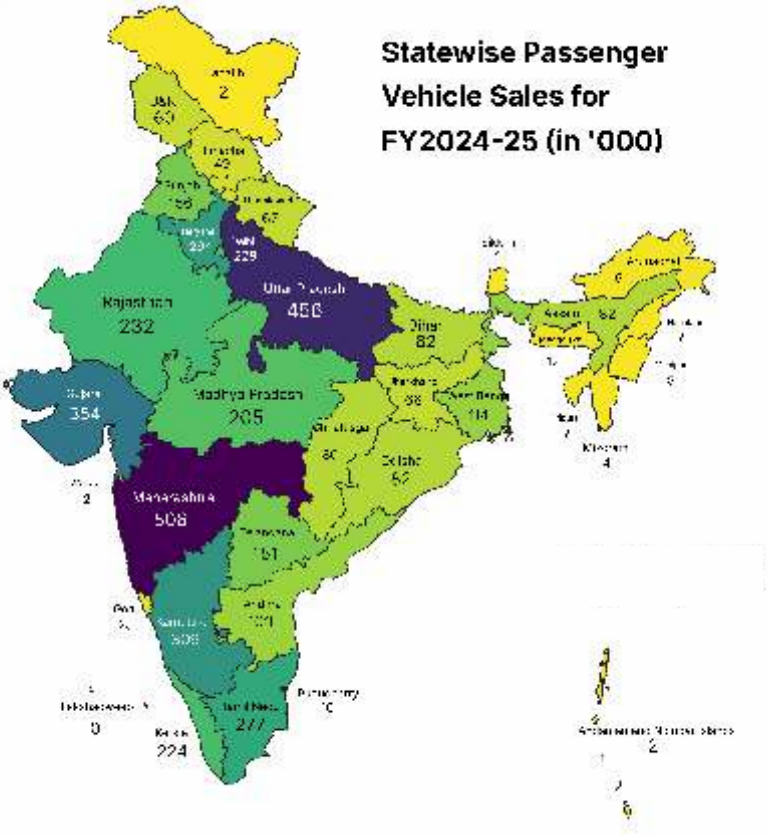
Three Wheelers



Two Wheelers

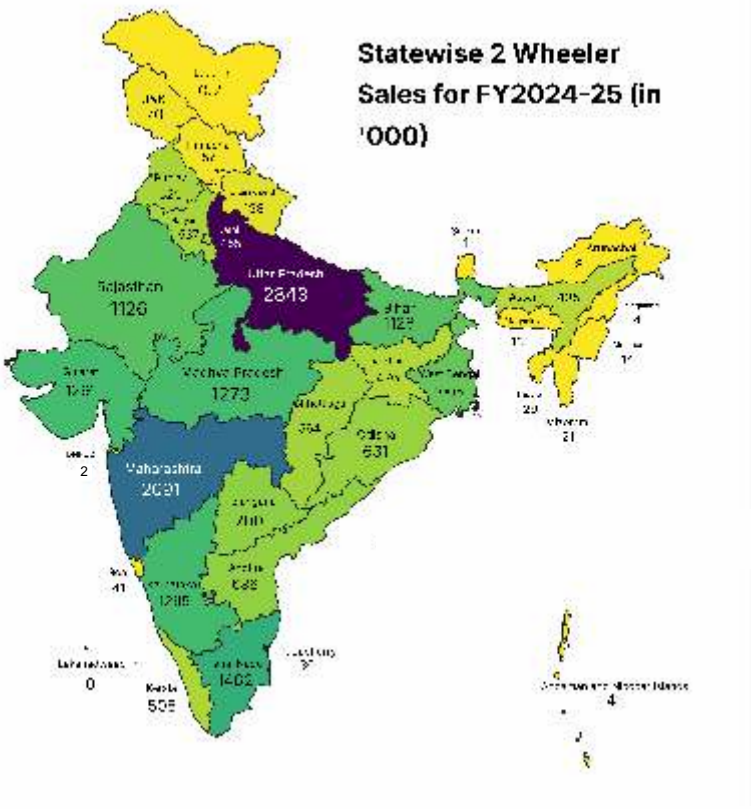


State wise sales in India 2024-25



Total Sales: 43 Lakh

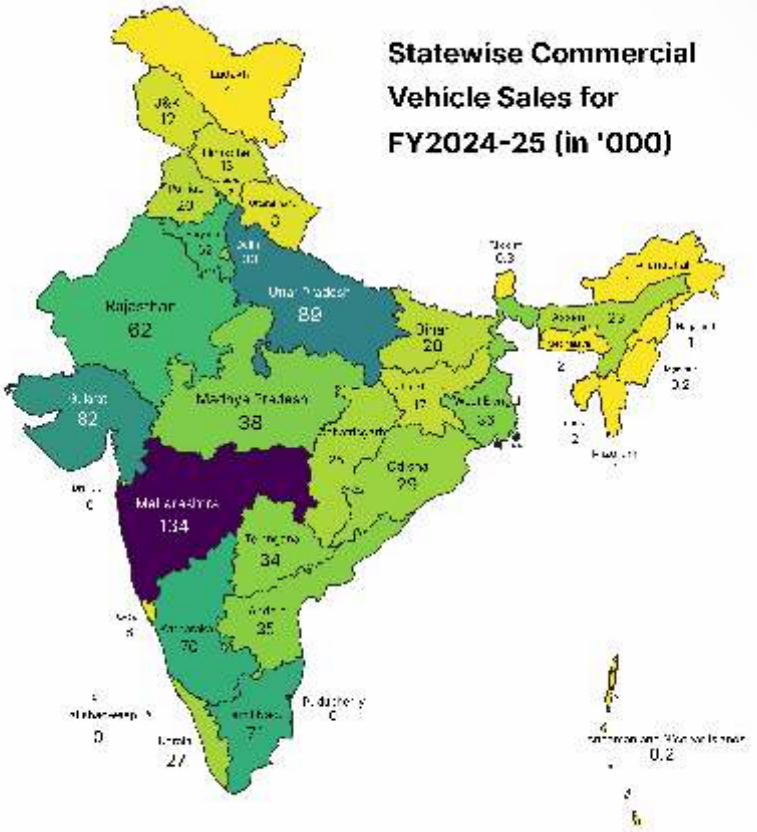
Low — High



Total Sales: 1.96 Crore

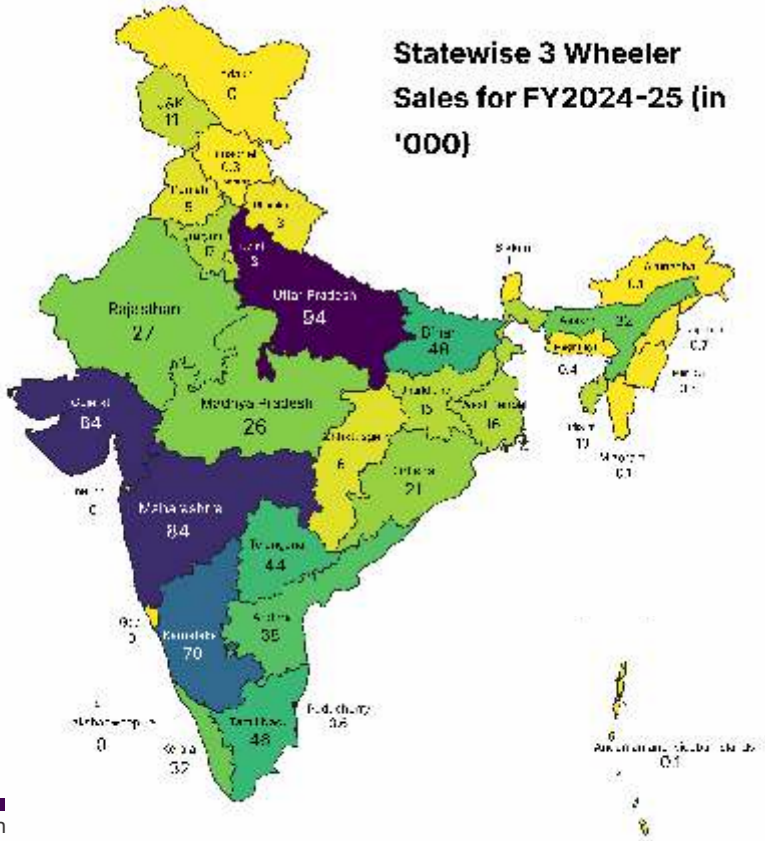
Low — High

State wise sales in India 2024-25



Total Sales: 9.6 Lakh

Low — High



Total Sales: 7.4 Lakh

Low — High

Automobile Production Trends

(In Nos.)

Category	2020-21	2021-22	2022-23	2023-24	2024-25
Passenger Cars	17,72,972	18,44,985	21,84,844	19,79,907	17,49,506
Utility Vehicles	11,82,144	16,91,081	22,61,749	27,77,051	31,55,312
Vans	1,07,164	1,14,632	1,40,523	1,44,882	1,56,346
Total Passenger Vehicles	**30,62,280**	**36,50,698**	**45,87,116**	**49,01,840**	**50,61,164**
M&HCVs	1,81,242	2,72,167	3,79,259	3,93,463	3,93,619
LCVs	4,43,697	5,33,360	6,56,367	6,74,041	6,39,026
Total Commercial Vehicles	**6,24,939**	**8,05,527**	**10,35,626**	**10,67,504**	**10,32,645**
Three Wheelers	**6,14,613**	**7,58,669**	**8,55,696**	**9,96,159**	**10,50,020**
Scooters	45,59,222	44,57,790	56,01,501	63,91,272	74,37,681
Motorcycles	1,31,54,501	1,28,90,149	1,34,21,208	1,45,89,393	1,59,22,027
Mopeds	6,36,218	4,73,172	4,36,300	4,87,862	5,24,149
Total Two Wheelers	**1,83,49,941**	**1,78,21,111**	**1,94,59,009**	**2,14,68,527**	**2,38,83,857**
Quadricycle	3,836	4,061	2,897	5,006	6,488
Grand Total	**2,26,55,609**	**2,30,40,066**	**2,59,40,344**	**2,84,39,036**	**3,10,34,174**

Automobile Domestic Sales Trends

(In Nos.)

Category	2020-21	2021-22	2022-23	2023-24	2024-25
Passenger Cars	15,41,866	14,67,039	17,47,376	15,48,947	13,53,287
Utility Vehicles	10,60,750	14,89,219	20,03,718	25,20,691	27,97,229
Vans	1,08,841	1,13,265	1,39,020	1,49,112	1,51,332
Total Passenger Vehicles	**27,11,457**	**30,69,523**	**38,90,114**	**42,18,750**	**43,01,848**
M&HCVs	1,60,688	2,40,577	3,59,003	3,74,012	3,73,819
LCVs	4,07,871	4,75,989	6,03,465	5,94,758	5,82,852
Total Commercial Vehicles	**5,68,559**	**7,16,566**	**9,62,468**	**9,68,770**	**9,56,671**
Three Wheelers	**2,19,446**	**2,61,385**	**4,88,768**	**6,94,801**	**7,41,420**
Scooters	44,82,305	41,12,672	51,90,702	58,39,325	68,53,214
Motorcycles	1,00,21,231	89,84,186	1,02,30,502	1,16,53,237	1,22,52,305
Mopeds	6,17,247	4,73,150	4,41,567	4,81,803	5,01,813
Total Two Wheelers	**1,51,20,783**	**1,35,70,008**	**1,58,62,771**	**1,79,74,365**	**1,96,07,332**
Quadricycle	(12)	124	725	725	120
Grand Total	**1,86,20,233**	**1,76,17,606**	**2,12,04,846**	**2,38,57,411**	**2,56,07,391**

Automobile Exports Trends

(In Nos.)

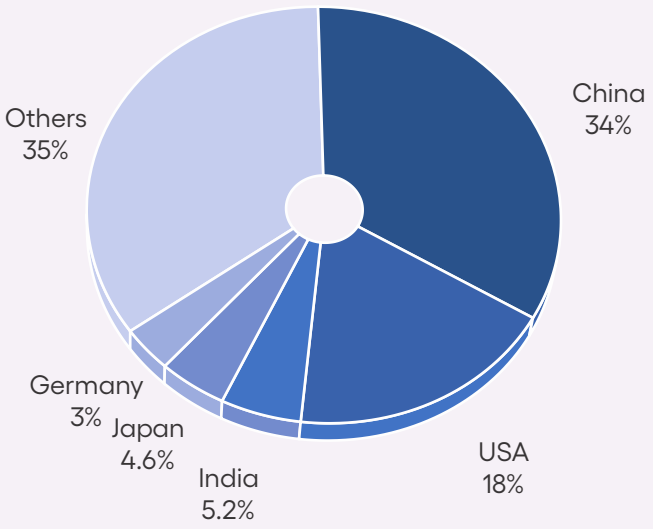
Category	2020-21	2021-22	2022-23	2023-24	2024-25
Passenger Cars	2,64,907	3,74,986	4,13,786	4,29,677	3,98,879
Utility Vehicles	1,37,842	2,01,036	2,47,306	2,34,720	3,62,160
Vans	1,648	1,853	1,611	7,708	9,325
Total Passenger Vehicles	**4,04,397**	**5,77,875**	**6,62,703**	**6,72,105**	**7,70,364**
M&HCVs	17,548	32,181	22,067	18,225	23,251
LCVs	32,786	60,116	56,578	47,593	57,735
Total Commercial Vehicles	**50,334**	**92,297**	**78,645**	**65,818**	**80,986**
Three Wheelers	**3,93,001**	**4,99,730**	**3,65,549**	**2,99,977**	**3,06,914**
Scooters	2,32,020	3,50,443	4,16,935	5,12,347	5,69,093
Motorcycles	30,42,453	40,82,442	32,30,981	29,43,341	36,20,886
Mopeds	8,313	10,246	4,206	2,728	8,424
Total Two Wheelers	**32,82,786**	**44,43,131**	**36,52,122**	**34,58,416**	**41,98,403**
Quadricycle	3,529	4,326	2,280	4,178	6,422
Grand Total	**41,34,047**	**56,17,359**	**47,61,299**	**45,00,494**	**53,63,089**

PERFORMANCE OF GLOBAL AUTO INDUSTRY IN 2024

The Automotive industry plays a pivotal role in driving global economic growth, supporting a vast supply chain, and generating substantial employment opportunities.

Sales Performance of Passenger Vehicles: Global Passenger Vehicle sales reached approximately 82 million units in 2024, marking a 3% increase over 2023. Notably, around 65% of passenger vehicle sales were concentrated in key markets such as China, USA, India, Japan, and Germany. The top 5 countries accounted for a significant share, with China leading at 34% of global passenger vehicle sales, followed by USA at 18%, India at 5.2%, Japan at 4.6%, and Germany at 3%. India continues to hold the position of the third-largest passenger vehicle market globally, behind China and the USA.

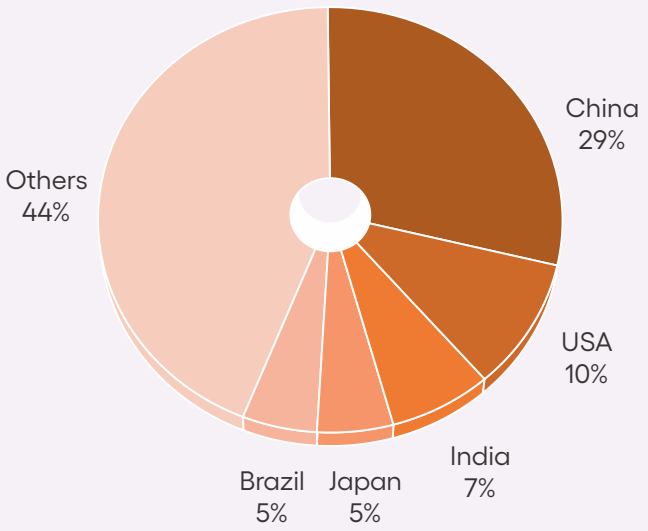
Top 5 Countries with % Share in Global PV Sales



Source: OICA and SIAM Analysis

Sales Performance of Commercial Vehicles: Global Commercial Vehicle sales in 2024 stood at approximately 13.4 million units, representing a 2% decline compared to 2023. Notably, 70% of global sales were concentrated in 10 key markets: China, USA, India, Japan, Brazil, France, UK, Germany, Australia, and Turkey. Among these, the top 5 countries accounted for a significant share, with China leading at 29% of global sales, followed by the USA at 10%, India at 7%, and Japan and Brazil each contributing 5%.

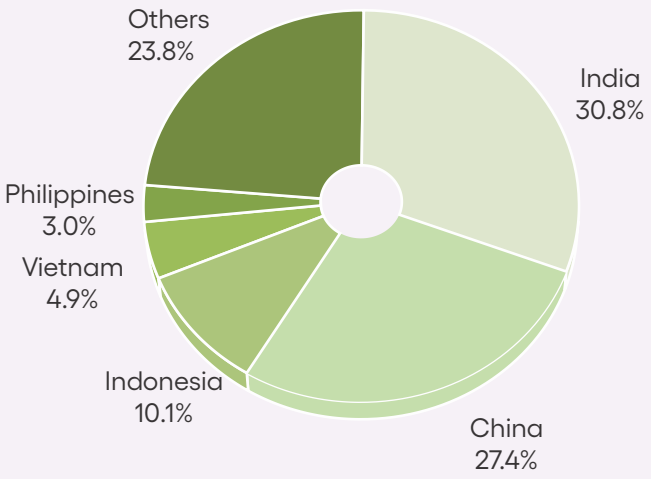
Top 5 Countries with % Share in Global CV Sales



Source: OICA and SIAM Analysis

Sales Performance of Two Wheelers: Two-wheelers offer a convenient and affordable mode of transportation, widely used by the masses in developing economies for personal mobility. Globally, an estimated 63.4 million units were sold in 2024. Notably, close to 88% of global sales were concentrated in 10 key markets: India, China, Indonesia, Vietnam, Philippines, Brazil, Thailand, Mexico, Pakistan and Taiwan. India emerged as one of the largest two-wheeler markets worldwide, with a share of close to 31% in global Two-Wheeler sales, followed by China (27%), Indonesia (10.1%), Vietnam (4.9%) and Philippines (3%).

Top 5 Countries with % Share in Global 2W Sales



Source: SIAM Analysis from various sources

SUSTAINABILITY & MARKET TRENDS

The global automotive industry stands at the threshold of a transformative era, where traditional boundaries between transportation, technology, and sustainability are rapidly blurring. As we witness the evolution from mechanically driven vehicles to software-defined mobility solutions, the global automotive landscape is reshaping itself around three fundamental pillars: sustainable fuel technologies, advanced digital architecture, and resilient supply chain networks. Let's look at how these interconnected forces are driving change across major global markets, creating both unprecedented opportunities and complex challenges for industry stakeholders worldwide.

Reimagining Vehicle Propulsion for Decarbonization

1.1 Transitioning from Gasoline to Flex Fuels

The phased replacement of gasoline with ethanol and flex fuels is advancing through flexible-fuel vehicles (FFVs), especially in regions with strong biofuel production. Effectiveness of Ethanol adoption has been observed to depend on ethanol availability, supportive policies, and infrastructure readiness.

Brazil leads globally, with over 80%[i] of new cars in 2024 capable of running on ethanol blends. This success is driven by long-term policy support, widespread refueling infrastructure, and consumer acceptance. Brazil also has progressively increased biodiesel blending mandates, aiming for 20% by 2030.[ii]

In the United States, flex-fuel vehicles are common mainly among SUVs and pickup trucks, with 1 in 15 light-duty vehicles capable of using E85 fuel.[iii]

India has rapidly scaled up its Ethanol Blending Programme, increasing blending from 1.5% in 2014 to 15% in 2024 to 20% in 2025, with E20 fuel now available at over 15,600[iv] retail outlets. It has established second-generation biofuel refineries and expanded feedstock sources, while also launching the SATAT initiative to promote Compressed Biogas production. These efforts have significantly reduced oil imports and CO_2 emissions, boosted rural incomes, and positioned India as a global leader through the formation of the Global Biofuels Alliance.

1.2 Evolving from NG to RNG Solutions

Compressed natural gas vehicles (NGVs) play a key role in advancing sustainable mobility by providing immediate emissions benefits while leveraging existing energy infrastructure. Growing environmental concerns and stricter emissions regulations are driving the demand for alternative fuels like renewable natural gas (RNG).

In the United States, RNG has made significant inroads, accounting for 79%[v] of all natural gas vehicle fuel in 2023. Total NGV fuel consumption reached 1.7 million metric tons, with RNG use increasing 16% from the previous year and nearly doubling[vi] over five years. The country supports this with over 700 CNG fueling stations and about 50 LNG stations[vii], mainly serving long-haul trucks. Despite powering more than 175,000 vehicles[viii], NGV new registrations have declined recently due to limited fueling infrastructure growth.

In Europe, natural gas mobility is gaining interest, especially in biomethane-powered vehicles. However, adoption remains limited, outside Germany, constrained by infrastructure availability. Securing NGVs'

future depends on expanding renewable fuel supply and improving fueling networks to support broader deployment.

India has emerged as the world's largest market for gas-based buses and three-wheelers, with CNG adoption expanding across public and private fleets and the launch of the world's first CNG two-wheeler. The SATAT initiative has accelerated Compressed Biogas (CBG) use, with cities like Indore running public buses on Bio-CNG and automakers introducing CBG-compatible vehicles. Backed by supportive policies, incentives, and growing infrastructure, gas-based mobility is helping India reduce emissions, lower oil imports, and utilize agricultural waste for cleaner transport solutions.

1.3 Mainstreaming of Electric Mobility

The surge in electric mobility continues across all major markets, each with distinct dynamics. In Asia-Pacific, led by China's 1.5 million EV sales in the first two months of FY26[ix], the region has become the most active electric mobility hub globally. On a monthly basis, sales of electric cars have overtaken conventional car sales in the country since July 2024, bringing the share of electric car sales close to 50% for the full year.[x] China not only dominates sales but also leads in innovation and manufacturing, expanding into Southeast Asia with new production facilities to meet rising demand. Advances in battery technology, particularly the growing adoption of lithium iron phosphate (LFP) batteries, are driving more cost-effective and safer solutions, supporting broader market growth.

On the other end of the globe, Europe which experienced a EV sales slump in 2024 is now experiencing a strong recovery in sales, a 27% year-on-year increase. BEVs specifically grew by 30%[xi], even as government incentives in key countries like Germany waned. Although Germany saw a dip in 2024 after subsidy cuts, EV sales rebounded by 35% in early 2025[xi], underscoring sustained consumer interest fuelled by greater model availability and improved economics.

In North America, electric vehicle sales hit 1.3 million units in FY25[xii], maintaining steady growth amid rising competition. The U.S. market is notable for its strong demand in the premium segment, where luxury electric vehicles made up nearly a third of luxury sales in 2024, reflecting consumer preference for high-performance, feature-rich models.

Boosted by cost effective models, supply and demand side incentives from government, Indian EV market has rapidly grown with EVs accounting for 7.8% of overall automobile sales in India in FY 24-25.[xiii]

Overall, EV adoption is expanding robustly worldwide, supported by evolving technologies, shifting regional strategies, and resilient consumer demand.

1.4 Advancing Towards a Hydrogen-Powered Future

Hydrogen offers zero-emission mobility without the weight and charging delays of large batteries, making it well-suited for specific applications. Hydrogen fuel cell technology is gaining traction as a complementary solution to battery-electric vehicles, particularly in commercial transportation, namely heavy-duty trucks, buses, and fleet vehicles where its advantages are clear. Automakers are investing in fuel cell efficiency, cost reduction, and integrated hydrogen ecosystems that cover production, distribution, and refuelling.

Regionally, hydrogen deployment is advancing from pilots to early commercial use. In Asia-Pacific, China leads in overall fuel cell buses and trucks deployment globally. Japan has ambitious targets for hydrogen fueling infrastructure and heavy vehicle deployment by 2030. South Korea supports hydrogen through major subsidies and plans for large fleets and refuelling infrastructure.

Europe is expanding heavy transport fleets with hundreds of fuel-cell buses and initiatives like H2Accelerate targeting long-haul trucks and fuelling corridors.

In North America, California drives adoption with thousands of fuel cell vehicles, numerous stations, and infrastructure plans for heavy-duty vehicles.

Despite progress, challenges remain in developing infrastructure and scaling green hydrogen production, which is costly and currently limited. The future of hydrogen fuel cell vehicles depends on overcoming these barriers while continuing technology improvements to enhance cost and performance.

Guided by Indian government's National Green hydrogen mission, key Indian manufacturers are investing in both fuel cell and hydrogen ICE technology for commercial vehicles, with several projects under the PLI scheme for auto components

Reshaping Vehicle Intelligence for Smarter Mobility

2.1 SDVs as the Backbone of Smart Mobility

Software-defined vehicle architecture is transforming the automotive industry by shifting control from numerous distributed electronic units to centralized high-performance computing platforms. By 2029, such vehicles could represent 90% of production, up from 3% in 2021[xiv], reflecting software's growing role in vehicle functionality, performance, and user experience.

This shift enables over-the-air updates and ongoing feature enhancements, changing how manufacturers interact with customers. It responds to consumer demand for connected, personalized vehicles, supports autonomous driving systems, and intensifies competition based on software capabilities rather than mechanical features.

Zone-based architecture, organizing functions by vehicle area, simplifies wiring, enhances integration, and supports modular, scalable development. However, this evolution brings challenges in cybersecurity, software validation, and system integration. Manufacturers are now building expertise in software management to ensure vehicle safety and reliability in this new era.

2.2 V2X Connectivity Enabling Intelligent and Connected Vehicles

Vehicle-to-Everything (V2X) communication is essential for advancing autonomous systems and smart transportation. By enabling vehicles to connect with other vehicles, infrastructure, and pedestrians, V2X extends awareness beyond onboard sensors, improving safety and coordination.

China leads V2X adoption, driven by government support and integration with smart city initiatives, demonstrating how coordinated efforts can accelerate connectivity. The combination of 5G technology with V2X enhances data speed, reduces latency, and enables real-time traffic management and safety applications. However, deploying 5G V2X requires significant investment and collaboration among automakers, telecom providers, and governments. The European Union has set ambitious targets for road safety, aiming for a 50% reduction in road deaths and serious injuries by 2030, with V2X-including C-V2X-as a key technology to achieve these goal Adoption challenges include differing regional standards, risking fragmentation, and the network effect where benefits grow as more users join, making initial adoption slower. Overcoming these hurdles is key to unlocking the full potential of V2X for advanced autonomous mobility.

2.3 Autonomy and ADAS Advancing Safer, Smarter Mobility

Autonomous and advanced driver assistance systems (ADAS) are shaping the next generation of vehicle safety and convenience. In 2024, nearly 69% of vehicles sold globally featured at least Level 1 automation[xv], with Level 1 systems like adaptive cruise control and lane-keeping widely adopted for their safety and affordability. Level 2 systems, capable of managing both steering and speed under certain conditions, are increasingly common in mid-range and premium models.

Level 3 automation, where vehicles handle all driving tasks in specific scenarios but require driver readiness, remains limited to select luxury vehicles and markets, highlighting technical and regulatory

challenges. This gap between Level 2 and Level 3 reflects the complexity of advancing automation safely.

Looking ahead to 2030, over 90% of vehicles are expected to include automation from Level 1 to Level 4[xvi], though Level 3 will likely represent under 10% of sales due to ongoing hurdles.

Autonomy development is focusing on targeted applications rather than full self-driving. Tesla's robotaxi service in Austin, Texas, demonstrates early commercial deployment with safety monitors accompanying rides. Additional pilot programs across several U.S. states explore autonomous solutions for rural mobility, last-mile delivery, and medical supply transport, reflecting the evolving role of autonomous systems in practical use cases.

Rewiring the Automotive Supply Chain for Scalable Growth

3.1 Strengthening Chip Supply Chains with Proven Strategies

Regional supply concentration, mainly in Asia, presents both risks and opportunities. Geopolitical tensions further complicate sourcing, with trade restrictions impacting semiconductor availability. The 2021-22 semiconductor shortage exposed the automotive industry's heavy reliance on semiconductors and highlighted the fragility of global supply chains. The shortage caused significant misses amounting to 9.5 million units[xvi] of lost global light-vehicle production, prompting manufacturers to rethink supply chain strategies.

Modern vehicles, especially electric vehicles, require thousands of semiconductor chips, nearly 3x more than traditional ICE models[xvii]. This growing complexity has made securing a stable chip supply essential.

In response, automotive companies have moved toward longer-term contracts and closer partnerships with chip suppliers. Some are even developing internal semiconductor capabilities to reduce reliance on broader markets. Building a resilient semiconductor supply chain now requires strategic collaboration, diversification, and careful navigation of global political factors to safeguard future production.

3.2 Advancing Battery Supply Diversification Efforts

Top 15

Country	Rank	Change
China	1	▲1
Canada	2	▼1
US	2	▲1
Germany	4	=
South Korea	5	▲1
Australia	6	▲3
Sweden	7	=
Norway	8	=
Japan	9	▲2
France	10	=
Finland	11	▼6
UK	12	=
Indonesia	13	▲4
India	14	▲2
Poland	15	▼1

Bottom 15

Country	Rank	Change
Brazil	16	▲5
Chile	17	▼4
Czech Republic	17	▲1
Vietnam	19	=
South Africa	20	▲2
Hungary	21	▼7
Thailand	22	▲2
Turkey	23	▲3
Argentina	24	▲1
Mexico	25	▼5
Slovakia	26	▼2
Philippines	27	=
Morocco	28	=
DRC	29	=
Bolivia	30	=

Source: *BloombergNEF. Note: The results are for 2024.*

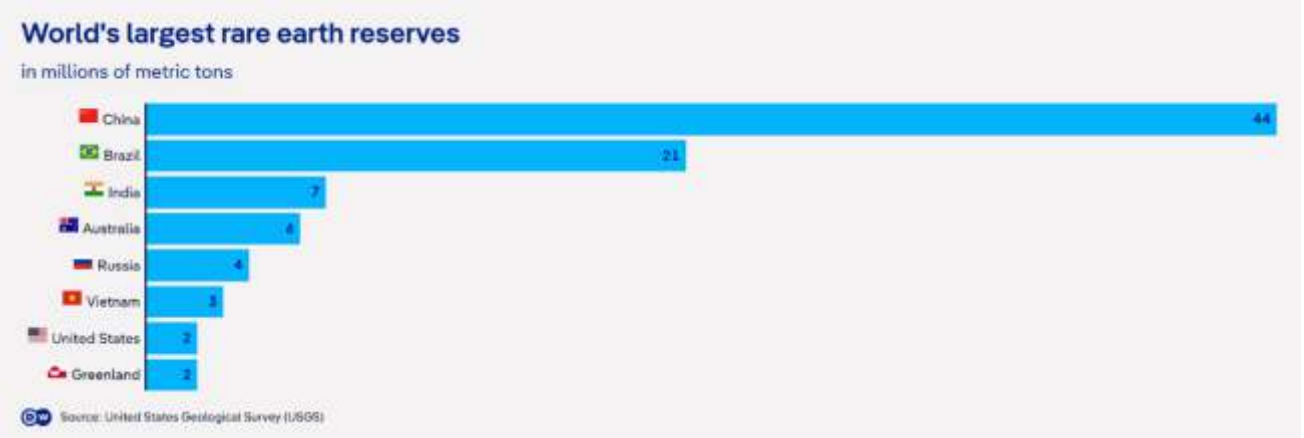
China remains dominant in the global EV battery supply chain, controlling key raw materials, processing, and manufacturing. Chinese companies hold over two-thirds of the global EV battery market, supplying more than 70% of installed batteries in new EVs worldwide as of 2024[xviii]. This dominance results from long-term government support and cost advantages.

Recent U.S. and EU trade measures, including increased tariffs and anti-dumping duties on Chinese battery materials and EVs, aim to reduce dependence on China and reshape supply chain economics. These actions reflect growing geopolitical concerns around over-reliance on a single country.

For countries like India, the challenge lies in balancing the efficiency and cost benefits of Chinese supply chains with the risks of concentration. Developing more diverse and resilient supply chains is an ongoing, cautious effort representing steps toward lessening China's dominance in the EV battery ecosystem.

3.3 Initiating Circular Approaches to Rare Earth Security

The shift to electrification has increased the automotive industry's reliance on rare earth elements, often sourced from limited regions. Recent export restrictions have caused supply disruptions, with some European plants halting production due to shortages. China produces 69% of the overall Rare Earth Elements while 90% of rare earth permanent magnets[xix], monopolising it.



To address these vulnerabilities, manufacturers are pursuing supply chain diversification, alternative materials, and vertical integration, including investments in mining and processing operations. Recycling rare earth elements from electronic waste is gaining focus as a sustainable approach, supported by emerging recovery techniques and regulatory measures like the EU's mandate for removing e-drive motors before vehicle shredding.

However, current recycling capacity remains insufficient for future demand, highlighting the need for significant investment in recycling infrastructure and technology to reduce dependence on mined rare earth materials.

The global automotive industry stands at a pivotal point, with sustainable, connected, and intelligent mobility already taking shape worldwide though at different speeds across regions. While EVs are a significant part of this shift, they represent just one chapter in a broader evolution toward next-generation smart mobility.

The future depends on successfully innovating across multiple parameters including identification of alternate battery chemistries, software-defined vehicle architectures, and developing the recycling ecosystem, especially for critical minerals. Alongside strategic investments in infrastructure and skills development will also play a key role in ensuring that sustainable mobility efforts are not impacted by inadequate ecosystem develop or talent shortage. Success requires not only technological innovation but also effective management of geopolitical, economic, and social challenges.

This transformation goes beyond new propulsion or digital features; it reflects a fundamental shift toward more sustainable and efficient mobility solutions. The choices made today in technology, policy, and investment will define how transportation integrates with our communities, economies, and environment for years to come.

SIAM 64th ANNUAL CONVENTION 2024

Society of Indian Automobile Manufacturers (SIAM), an apex national body representing all major vehicle and vehicular engine manufacturers in India, commemorated its 64th Annual Convention on 10th September 2024 at New Delhi and discussed the pivotal role of sustainable mobility in achieving Viksit Bharat goals by 2047.

On 64th SIAM Annual Convention, Hon'ble Prime Minister of India, Shri Narendra Modi in his message emphasized on the need for the Automobile sector to set an example for others to follow and said, "The road ahead demands that our progress is rapid while also being sustainable. Working on greener and cleaner mobility is a vital step in this direction".

सत्यमेव जयते

प्रधान मंत्री
Prime Minister

MESSAGE

Heartiest congratulations and best wishes to the Society of Indian Automobile Manufacturers for the 64th Annual Convention. This significant milestone represents a celebration of SIAM's past achievements and an occasion to derive inspiration for the future.

Over the last decade, India's automotive sector has witnessed tremendous and unprecedented growth. This is as much a testament to our nation's expanding economic growth, as it is to the pivotal role played by the automotive industry.

The success story of Indian mobility is noteworthy. The nation is witnessing the creation of future-ready infrastructure, such as state-of-the-art expressways, high-speed railways and other forms of multi-modal connectivity that reaches every corner. This holistic approach is ensuring that the benefits of growth are not just confined to a few, but are shared by all.

As we shift gears and work towards our collective goal of a Viksit Bharat by 2047, I am confident that organizations like SIAM will continue to bring together all stakeholders and become a force multiplier in this mission.

The road ahead demands that our progress is rapid while also being sustainable. Working greener and cleaner mobility is a vital step in this direction. It is important that this climate-conscious and sustainable vision resonates with domestic and international partners.

Further, at this critical juncture for India and the world, it is essential that our automobile sector not only set an example for others to follow, but also work towards bringing global best practices to India. I am confident that the discussions and deliberations during the Annual Convention will serve as a catalyst for this.

Through innovation and enterprise, I am sure that the automotive industry will drive even higher economic growth and in turn, thrive on the demand that growth inevitably creates.

One again, best wishes to the Society of Indian Automobile Manufacturers for the 64th Annual Convention.

(Narendra Modi)

New Delhi
भाद्रपद 16, शक संवत् 1946
07th September, 2024

During the inaugural session, themed “Sustainable Mobility Journey towards Viksit Bharat”, Chief Guest, Shri Nitin Gadkari, Hon'ble Union Minister of Road Transport & Highways, Government of India highlighted the Government's initiatives and vision for sustainable transportation. He stated that the Auto industry plays a pivotal role in realizing the Prime Minister's vision of transforming India into a USD 5 trillion economy and elevating it to the 3rd largest economy globally. He further mentioned the ambition to make India the number one Auto manufacturing hub globally. As the country strives to achieve carbon neutrality by 2070, he underscored that innovation and sustainable practices within the Auto sector will be critical.

Guest of Honour, Shri. H. D. Kumaraswamy, Hon'ble Union Minister of Heavy Industries and Steel, Government of India, highlighted the critical importance of industrial growth aligned with sustainability goals. He emphasized that strengthened by the Prime Minister's sustainability commitments at Glasgow and supported by robust Make in India initiatives, the Government is aggressively promoting electric mobility. He noted that policy measures are being designed to accelerate this transition, fostering a conducive environment for industry growth and sustainable development.

Mr. Vinod Aggarwal, (the then) President of SIAM and Managing Director & CEO of Volvo Eicher Commercial Vehicles Ltd., highlighted the Auto industry's pivotal role in driving sustainable mobility. He emphasized that the industry is not only keeping pace but also setting benchmarks for sustainable growth. Looking ahead to Viksit Bharat 2047, he reaffirmed SIAM's steadfast commitment to decarbonisation and safety. With initiatives such as the FAME scheme supporting a 90% growth in e-passenger vehicles, and a focus on ethanol and gaseous fuels, the industry is steering towards cleaner, greener mobility.

Mr. Shailesh Chandra, (now) President of SIAM and Managing Director of Tata Motors Passenger Vehicles Ltd. and Tata Passenger Electric Mobility Ltd., emphasized the need for collective efforts to accelerate the transition to sustainable mobility. He highlighted that the Government's strong commitment to sustainable transport, along with the consistent support from various Ministries, has greatly facilitated the industry's transition. He reaffirmed that the industry is fully aligned with the Government's vision of ensuring sustainable, safe, and affordable transport solutions, with a long-term goal of achieving net carbon-zero. Mr. Rajesh Menon, Director General, SIAM, was also present during the session.

The 1st Special Plenary Session themed “Achieving Global Leadership in Sustainable Mobility”, was moderated by Mr. Shailesh Chandra, (now) President of SIAM and Managing Director of Tata Motors Passenger Vehicles Ltd. and Tata Passenger Electric Mobility Ltd.

During the session, Guest of Honour, Shri. Anurag Jain (the then), Secretary, Ministry of Road Transport & Highways, Government of India, highlighted the importance of collaboration between the Government and the Auto industry to drive sustainable growth. As India aspires to become a developed nation by 2047, he noted, substantial efforts are required across multiple sectors. Outlining plans to expand National Highways and the metro network from 21 to 60 cities by 2047, he reaffirmed the Government's commitment to strengthening infrastructure. He added that the vision for Amrit Kaal rests on four pillars: efficient and equitable logistics, safety in movement, sustainability in transport, and enhanced user convenience.

Mr. Klaus Zellmer, Chairman of the Management Board & CEO of Škoda Auto a.s., Mr. Hisashi Takeuchi, Managing Director & CEO of Maruti Suzuki India Ltd., Mr. K N Radhakrishnan, Director & CEO of TVS Motor Company Ltd., and Mr. Nitesh Gupta, Partner and Leader of Auto Practice in India at McKinsey & Company were also present during the session.

During the 2nd Special Plenary Session themed "Technological Innovations- A Catalyst for Fueling Growth in Sustainable Mobility", Mr S Sandilya, Past President, SIAM and Group Chairman, Royal Enfield (A Unit of Eicher Motors Ltd), Mr. Joykumar Thokchom, Chief Technology Officer, Battery Business Unit at Sakuu Corporation, Mr. Jesse Schneider, CEO & Chief Technology Officer, ZEV STATION LLC and Mr. Andreas Tschiesner, Senior Partner and Leader of Global Advanced Industries Practice, McKinsey & Company presented their views. The session highlighted how advances in battery and hydrogen technologies, carbon-neutral fuels, and software-driven vehicles are reshaping

mobility solutions, paving the way for a cleaner and smarter transport future.

During the 3rd Special Plenary Session themed "Aatmanirbharta in Automobile Supply Chain & Leveraging India's Potential in Global Markets", Guest of Honour, Shri. Sunil Barthwal, Secretary, Department of Commerce, Ministry of Commerce and Industry, Government of India, acknowledged the vital roles of SIAM and ACMA in strengthening the automotive value chain. He highlighted that as India targets net zero by 2070, the Auto sector is set for significant transformation. With growing demand from the US, EU, and African markets, India is strategically positioned to expand its automotive exports.

Guest of Honour, Dr. V. Anantha Nageswaran, Chief Economic Adviser, Government of India, noted that the Indian economy is expected to grow at a rate of 6–6.5%. He emphasized the need for the industry to invest in R&D and approach the electric transition with a focus on strengthening India's resilience in securing critical materials for EVs.

Mr. Vinod Aggarwal, (the then) President, SIAM and Managing Director & CEO, Volvo Eicher Commercial Vehicles Ltd., and Ms. Shradha Suri Marwah, President, ACMA and Chairperson & Managing Director of Subros Ltd., were also present during the session.

Shri Nitin Gadkari, Hon'ble Union Minister of Road Transport & Highways, Government of India and Shri H. D. Kumaraswamy, Hon'ble Union Minister of Heavy Industries and Steel, Government of India during Inaugural Session of 64th SIAM Annual Convention

Shri Anurag Jain (the then), Secretary, Ministry of Road Transport & Highways, Government of India during Special Plenary Session 1 of 64th SIAM Annual Convention

Shri Sunil Barthwal, Secretary, Department of Commerce, Ministry of Commerce and Industry, Government of India and Dr. V. Anantha Nageswaran, Chief Economic Adviser, Government of India during Special Plenary Session 3 of 64th SIAM Annual Convention

BHARAT MOBILITY GLOBAL EXPO 2025

Driving the Future of Sustainable Mobility

The Society of Indian Automobile Manufacturers (SIAM) played a central role at the Bharat Mobility Global Expo 2025, advancing the themes of sustainable mobility - electrification, road safety, decarbonization and material circularity. The event brought together over 1,200 exhibitors and nearly 9.8 lakh visitors across three major venues - Bharat Mandapam, Yashobhoomi (Dwarka), and India Expo Center (Greater Noida) - showcasing India's growing leadership in global mobility.

Under the overall thrust on Sustainable Mobility, three pilar approach of Road Safety, Decarbonisation and Economic is followed. At the core of SIAM's sustainability strategy are six flagship campaigns and initiatives that guide India's transition toward a cleaner, safer, and more inclusive mobility ecosystem. These initiatives reflect a multi-pathway approach to decarbonization while balancing energy security, affordability, and environmental responsibility. The first, विधुतीकरण (Electrification), supports the rapid adoption of electric vehicles across segments by enabling supportive policies, charging infrastructure, and local innovation. The जैविक पहल (Bio-Initiative) advocates for greater biofuel integration, including ethanol blending, to diversify energy sources and strengthen rural economies. गैस गतिशीलता (Gas-Based Mobility) promotes the use of cleaner gaseous fuels like CNG and LNG. हरित हाइड्रोजन (Green Hydrogen) focuses on enabling hydrogen-powered technologies, especially for long-haul and heavy-duty vehicles. The सुरक्षित सफर (Safe Journey) initiative addresses road safety through public education, structured reforms, and stakeholder collaboration. Finally, the Circular Economy pillar promotes end-of-life vehicle recycling, resource efficiency, and sustainable manufacturing.

Collectively, these pillars support India's Net Zero ambitions, align with Mission LiFE, and contribute to the broader vision of a Viksit Bharat by 2047. The Economic pilar comprises of supporting Aatmanirbhar Bharat and strengthening exports. SIAM members have intensified efforts toward deep localisation of components, working closely with Automotive Component Manufacturers Association of India (ACMA), Automotive Tyre Manufacturers Association (ATMA), Indian Steel Association (ISA) and The Alloy Steel Producers Association of India (ASPA), among others.

Shri Narendra Modi, Prime Minister, India visiting the pavilions at BMGE 2025

International Conferences

SIAM organised 5 international conferences on the sidelines of Bharat Mobility Global Expo 2025:

11th Auto Trade Dialogue

The Society of Indian Automobile Manufacturers (SIAM) organized the 11th Auto Trade Dialogue on the sidelines of Bharat Mobility Global Expo 2025 at Bharat Mandapam, New Delhi themed "Changing Paradigm of Global Trade Practices in the Auto Sector". The event brought together key government officials, industry leaders, policymakers, and academics to discuss emerging trends, challenges, and opportunities in the automotive trade landscape.

More than ten countries across the world participated in this dialogue with an objective to strengthen the ties of the global automotive sector. Key Indian Industry experts and Government of India officials also marked their presence. The discussions revolved around fostering trade linkages, facilitating investments, importance of localization policies in fostering innovation as countries are mow moving towards cleaner energy solutions, role of FTAs in facilitating easier access to partner markets, ensuring availability of raw materials and critical components leading to strengthening od supply chain.

The event featured three sessions in which key speakers expressed their thoughts and opinions around the event's theme. These sessions delved into critical topics shaping the Automotive sector.

11th Auto Trade Dialogue at Bharat Mandapam, New Delhi

4th Global Electrification Mobility Summit (GEMS)

The 4th edition of GEMS, was organized by SIAM on 18th Jan 2025 at Bharat Mandapam, New Delhi along the sidelines of Bharat Mobility Global Expo 2025, under its flagship initiative विद्युतीकरण (Electrification).

The conference themed "Powering India's EV Leap: Reaching the Tipping Point" served as a pivotal platform for stakeholders across the electric mobility spectrum to come together and deliberate on India's journey towards widespread EV adoption.

Left to Right: Mr. P.K. Banerjee, Executive Director, SIAM, Mr. Francois Roudier, Secretary General, OICA, Mr. Sudhendu J. Sinha, Advisor, NITI Aayog, Chief Guest Shri H.D. Kumaraswamy, Hon'ble Minister of Heavy Industries and Steel, Government of India, Mr. Shailesh Chandra, President, SIAM, and Managing Director, Tata Motors Passenger Vehicles & Tata Passenger Electric Mobility, Dr. Hanif Qureshi, Additional Secretary, Ministry for Heavy Industries, Mr. K N Radhakrishnan, Director, & CEO, TVS Motor Company, Mr. Sushant Naik, Chairman, SIAM Electric Mobility Group & Global Head, Government & Corporate Affairs, Tata Motors

The event featured participation from senior government dignitaries, including representatives from the Ministry of Heavy Industries and NITI Aayog, reflecting the strong policy backing for EV expansion in the country. Key discussions focused on the impact of government schemes such as FAME, PLI, and PM-eDrive, and their role in building a conducive policy framework for EV penetration across vehicle segments.

Throughout the day, thematic sessions highlighted key global and domestic imperatives for EV growth, ecosystem development, and industry-wide collaboration. Discussions covered critical areas including battery technology advancements, the role of IoT and M2M in smart mobility, innovations in vehicle registration and charging infrastructure, fleet electrification, and localization of raw materials. Global best practices from the UK, Germany, Indonesia, and Austria were also shared, offering valuable lessons for India's evolving EV landscape.

Left to Right: Ms. Angela Mans, German Association of Automotive Industry-VDA, Mr. Mike Hawes, CEO, SMMT, Mr. Ashim Sharma, Senior Partner, NRI Consulting & Solutions, Mr. Andreas Volk, CEO, Bet Motors, Mr. Abhishek Yadav, Co-founder and COO, iMOTO, Mr. Bruce Aitken, CFO, Gogoro

Towards the end, the CXO panel, comprising top leadership from leading OEMs, offered strategic insights on achieving scale, addressing ecosystem gaps, balancing price-value expectations, and the importance of innovation in business models. The consensus underscored the urgency of a consumer-centric approach, continued investments in R&D, and robust charging infrastructure to meet the growing aspirations of Indian EV users.

Key Outcomes

- India's EV industry is at a tipping point, driven by growing product range and changing consumer preferences.
- Key priorities include improving battery range (300+ km), faster charging, cost reduction, and localized battery production.
- A robust charging network and battery recycling ecosystem are critical for scaling EV adoption.
- New business models like battery swapping, IoT integration, and flexible financing are enhancing affordability and access.
- Coordinated efforts across government, industry, and tech partners are essential for building public infrastructure and long-term EV growth.
- Clear policies and consumer-focused strategies will shape future investments and accelerate adoption.

1st Summit on Automotive Future Advancement in Road Safety (SAFAR)

The SAFAR summit themed "United Efforts for Road Safety: Safer Roads, Our Responsibility" was organised on 19 January 2025, alongside the Surakshit Safar Pavilion at the Bharat Mobility Global Expo 2024, marked the launch of a dedicated platform to tackle India's rising road safety concerns. Organized under SIAM's Surakshit Safar (Safe Journey) initiative, the event aimed to unify policymakers, industry stakeholders, and civil society in advancing a people-centric approach to road safety.

Left to Right: Mr. Prashant K Banerjee, Executive Director, SIAM, Mr. Kazuyoshi Kuroki, Manager Chief Engineer, Honda Motor Co. Ltd. Safety Strategic Planning Department, Safety Planning Division, Corporate Planning Supervisory Unit, Mr. Sanjay Bandopadhyaya, Member, Supreme Court Committee on Road Safety, Mr. V Umashankar, Secretary, Ministry of Road Transport & Highways, Govt of India, Mr. Shailesh Chandra, President SIAM and MD Tata Motors PV and Tata Motors Electric Mobility, Mr. Piyush Arora, Managing Director & CEO, SKODA AUTO Volkswagen India, Mr. Sushant Naik, President, SAFE and Global Head, Govt & Public Affairs, Tata Motors

The SAFAR Summit called for a collective and integrated approach to road safety in India, anchored around the "5Es"- Education, Enforcement, Engineering, Emergency Care, and Evaluation. Key discussions focused on systemic reforms, improved infrastructure, advanced vehicle safety technologies, driver education, and stronger emergency response. Emphasis was placed on public-private partnerships, data-driven enforcement, and community participation, highlighting that road safety is a shared societal responsibility, not just a regulatory mandate.

Key Outcomes

- Education & Awareness focuses on driver training, school curriculum integration, and nationwide campaigns to promote road safety.
- Technology & Enforcement involves AI-based traffic systems, stricter enforcement, and real-time data sharing across agencies.
- Engineering Improvements include smart traffic systems, safer road designs, and mandatory vehicle safety upgrades to reduce accidents.
- Emergency Response aims to improve golden hour care, expand ambulance coverage, and standardize accident reporting protocols.
- Data Systems & Evaluation emphasize centralized databases, predictive analytics, and real-time tracking for informed policymaking.
- Multi-Sector Collaboration calls for coordinated efforts among government, industry, health services, and NGOs to scale safety solutions.

3rd International Conference on Sustainable Circularity (ICSC)

The 3rd edition of ICSC, held on 20th January 2025 at Bharat Mandapam, New Delhi, focused on enabling collaboration across the automotive and recycling sectors to accelerate India's transition to a circular economy. Inaugurated by the Hon'ble Union Minister of Environment, Forest & Climate Change, the event featured the launch of SIAM's strategy paper, *"Towards Circular Future in the Indian Automobile Industry: Integrating EPR Regime in Waste Stream Regulations"*, highlighting the integration of EPR into waste regulations. Discussions centred on transforming the ELV recycling ecosystem through policy support, technology, and green job creation.

Left to Right: Mr. P.K. Banerjee, Executive Director, Chief Guest Shri Bhupender Yadav, Hon'ble Union Minister, MoEFCC, Mr. Vikram Kasbekar, ED and CTO, Hero MotoCorp, at SIAM International Conference on Sustainable Circularity (ICSC)

Mr P K Banerjee, ED, SIAM, Mr Sanjay Mehta, President, MRAI; Mr Vikram Kasbekar, CTO & ED, Hero MotoCorp Ltd; Mr A L N Rao, Head Recycling, Recykal; Mr Mahmood Ahmed, Additional Secretary, MoRTH; Mr Arvind Nautiyal, Member Secretary, CAQM; Mr Timo Unger, Chairperson - Working Group on Materials & Substances, ACEA ; Mr M S Anandkumar, Chair, SIAM Recycling & Material Group and SGM, TVS Motor Company

Key Outcomes:

- Policy and Regulation discussions emphasized regulatory consistency, efficient EPR compliance, and strict enforcement to strengthen ELV recycling.
- Technological Advancement focused on using AI, IoT, and blockchain for improving ELV traceability, along with innovations in green steel and recycling.
- Infrastructure and Investment stressed the need to expand certified recycling infrastructure and set up RVSFs and formal recycling hubs.
- Collaboration and Business Models explored new models for ELV collection, consumer incentives, and OEM-recycler-technology partnerships.
- Global Learning and Best Practices encouraged adoption of international ELV recycling models from countries like Japan and Australia.
- Eco-design and Lifecycle Thinking promoted integrating circular design from manufacturing stages using modular, recyclable, and sustainable materials.

3rd International Symposium on Thriving Eco-energy in Mobility (ISTEM)

The 3rd edition of ISTEM was held on 21st January 2025 at Bharat Mandapam, New Delhi, under the theme *"Decarbonization Roadmap: Towards a Carbon-Neutral Future."* Organized by SIAM, the event brought together stakeholders from government, industry, academia, and technology sectors to discuss India's transition to low-carbon mobility. Key discussions focused on scaling up biofuels, natural gas, and hydrogen as alternative fuels, addressing infrastructure and policy needs, and fostering public-private partnerships. The conference emphasized the importance of harmonized regulations, technology readiness, and collaborative efforts to advance clean fuel adoption and achieve national decarbonization goals.

Left to Right: Mr. P.K. Banerjee, Executive Director, SIAM, Mr Gautam Goel, President, ISMA, Shri Hardeep Singh Puri, Honourable Union Minister, Ministry of Petroleum and Natural Gas, H.E. Mr. Ambassador Kenneth Nóbrega, Ambassador of Brazil to India, Mr. Hisashi Takeuchi, MD & CEO, MSIL

Key Outcomes

- Pilot projects on hydrogen mobility, ethanol blending, and CBG are underway but need policy and infrastructure support to scale.
- Scaling clean fuels requires secure feedstock, localized production, and stable, incentive-driven policies.

Global Experts at Bio-fuels session at 3rd International Symposium on Thriving for Eco-Energy in Mobility

- Faster rollout of CNG/LNG stations and strategic refueling infrastructure is a key industry priority.
- Collaboration across ministries, OEMs, energy providers, and academia is essential for scalable alternative fuel solutions.
- Consumer education on cost, efficiency, and availability is critical for mass adoption of clean fuels.

Pavilions and Exhibits

The Society of Indian Automobile Manufacturers (SIAM) showcased its commitment to a sustainable, people-centric, and responsible automotive future through five flagship pavilions - **Decarbonisation, Electrification, Recycling, Auto Aatmanirbhar Zone** and **सुरक्षित सफर (Safe Journey)** at the Bharat Mobility Global Expo (BMGE) 2025. These pavilions, aligned with India's net-zero and "Viksit Bharat 2047" goals, demonstrated cutting-edge technologies, policy support, and collaborative industry efforts toward green and safe mobility. With the extensive participation from Industry, key government officials as well as almost 9.8 Lakh visitors, the pavilions met their objective in demonstrating the Indian auto industry's capabilities and commitment towards sustainable mobility.

Cross-Cutting Themes and Impact

Across all pavilions, the overarching theme of "People-Centric Mobility Ecosystem" remained central. The pavilions served as powerful vehicles to raise awareness, build public engagement, and reinforce India's national missions including LiFE (Lifestyle for Environment), Panchamrit, and the Vehicle Scrappage Policy.

SIAM's participation at Bharat Mobility Global Expo 2025 successfully:

- Amplified the industry's contribution toward net-zero emissions by 2070.
- Promoted EV penetration and alternate fuel adoption.
- Highlighted the shift toward circularity and extended producer accountability.
- Fostered a culture of road safety through education, engagement, and experiential learning.

The overwhelming public participation, supported by consistent government backing, reinforced the shared vision of transforming India's mobility landscape into one that is cleaner, safer, and more sustainable.

Auto Aatmanirbhar Zone

The Auto Aatmanirbhar Zone at Bharat Mobility Global Expo 2025 at Bharat Mandapam, New Delhi is the second edition of the initiative taken by SIAM Sourcing Group. The first Auto Aatmanirbhar Zone was during Bharat Mobility Expo 2024 from 1st to 3rd February 2024 at Bharat Mandapam, New Delhi.

The Auto Aatmanirbhar Zone highlighted the relentless localization efforts of Indian automobile manufacturers in alignment with the Government

of India's Aatmanirbhar Bharat mission. The initiative aimed to establish self-reliance across the entire automotive value chain. This dedicated zone provided a curated showcase of key components, sub-assemblies, and advanced technologies where significant localization strides have been made. It also featured critical components yet to undergo localization, underscoring the vast potential for domestic manufacturing in vehicle production.

The exhibit served as a strategic platform to encourage Indian component manufacturers to assess the feasibility of producing these parts locally. It also sought to attract investments in emerging automotive technologies that are currently being imported by the industry.

Auto Aatmanirbhar Zone exhibited components under "Shining Examples" where progress has been made for further localization and also exhibited components under "Localization Opportunities" where localization is yet to commence.

Auto Aatmanirbhar Zone at Bharat Mobility Global Expo 2025, Bharat Mandapam, New Delhi

Participants at Auto Aatmanirbhar Zone at Bharat Mandapam, New Delhi

Decarbonisation Pavilion

Held in Hall 10, Pragati Maidan, the Decarbonisation Pavilion reflected India's ambitious climate goals and its transition toward low-carbon fuels. Showcasing solutions across electric vehicles, biofuels, natural gas, and green hydrogen, the pavilion highlighted the growing momentum of alternate fuels in the Indian mobility ecosystem. SIAM promoted four key verticals: विधुतीकरण (Electrification), जैविक पहल (Bio-Initiative), गैस गतिशीलता (Gas Mobility), and हरित हाइड्रोजन (Green Hydrogen).

Hon'ble Ministers at SIAM Decarbonisation Pavilion

SIAM Decarbonisation Pavilion at Hall 10, Bharat Mandapam, New Delhi

Key Highlights

- Educational panels on the Panchamrit Climate Action Plan and alternate fuels.
- Display of flex-fuel, electric, and CBG-operated vehicles.
- Central installation with comparative fuel information and a working CBG plant model
- Interactive elements: quiz kiosks, digital pledge boards, and photo booths

Inauguration

The pavilion was inaugurated by the Union Minister of Road Transport and Highways. It was graced by visits from Union Ministers of Commerce & Industry, Heavy Industries, Environment, Forest and Climate Change, and Petroleum and Natural Gas, reflecting strong cross-ministerial support.

Union Minister, Shri Nitin Gadkari, MoRTH; Union Minister, Shri Piyush Goyal, Ministry of Commerce and Industry; Union Minister, Shri H D Kumaraswamy, MHI; Union Minister, Shri Bhupendra Yadav, Ministry of Environment, Forest and Climate Change; and Union Minister, Shri Hardeep Singh Puri, MoPNG visited the SIAM Pavilions

Electrification Pavilion

Located in Hall 11, Pragati Maidan, the Electrification Pavilion was a celebration of India's progress toward 30% EV sales by 2030. The pavilion served as a platform to demonstrate the rapid strides in electric mobility, underpinned by SIAM's flagship initiative—विधुतीकरण (Electrification).

SIAM Electrification Pavilion at Hall 11, Bharat Mandapam, New Delhi

Key Highlights

- Panels outlining India's EV policy roadmap and dispelling EV myths.
- Display of latest electric vehicle models and technologies.
- Engagement through interactive zones: quizzes, pledge boards, and photo booths.

Inauguration

The pavilion was inaugurated by the Union Minister of Heavy Industries and witnessed visits from the Union Ministers of Commerce & Industry and Road Transport and Highways, reaffirming the Centre's unified commitment to clean mobility.

SIAM Electrification Pavilion inaugurated by Union Minister, Shri H D Kumaraswamy, Ministry of Heavy Industries and Steel, Govt of India

Union Minister, Shri Nitin Gadkari, MoRTH, Govt of India interacting with Exhibitors in Hall 11 at Bharat Mandapam, New Delhi

Union Minister, Shri Piyush Goyal, Ministry of Commerce and Industry, Govt of India visiting the SIAM Electrification Pavilion at Hall 11, Bharat Mandapam, New Delhi

Recycling Pavilion

The Recycling Pavilion, organized in Hall 9, promoted circular economy principles within the automotive sector. With a sharp focus on End-of-Life Vehicle (ELV) recycling and the Extended Producer Responsibility (EPR) regime, it showcased innovations that ensure material efficiency and sustainable manufacturing.

SIAM Recycling Pavilion at Hall 9, Bharat Mandapam, New Delhi

Key Highlights

- Participation from RVSFs, recyclers, and technology providers.
- Demonstrations of ELV recycling processes and scrappage solutions.
- Focus on reducing environmental impact through reuse and repurposing of automotive materials.

Inauguration

The pavilion was inaugurated by the Union Minister for Road Transport and Highways, accompanied by ministers from Commerce & Industry, Heavy Industries, Environment, Forest and Climate Change, and Petroleum and Natural Gas, underscoring the inter-ministerial collaboration for sustainable automotive practices.

Union Minister, Shri Nitin Gadkari, MoRTH, Govt of India inaugurating the Circularity Pavilion at Hall 9, Bharat Mandapam, New Delhi

Shri Bhupender Yadav, Union Minister, MoEFCC interacting with the exhibits

Shri Piyush Goyal, Union Minister, MoCI, at the SIAM Recycling Zone

Shri Hardeep Singh Puri, Hon'ble Minister of Petroleum & Natural Gas, at SIAM Sustainable Mobility Pavilion

सुरक्षित सफर (Safe Journey) Pavilion

Organised as part of the National Road Safety Month 2025, the third edition of the Safe Journey Pavilion was held at Bharat Mandapam, New Delhi.

It emphasized the four pillars of road safety - Education, Engineering, Enforcement, and Emergency Care (4Es) - through immersive and experiential exhibits.

SIAM सुरक्षित सफर (Safe Journey) *Pavilion at Pragati Maidan, New Delhi*

Key Highlights

- Four dedicated thematic zones with interactive installations, simulators, crash-rated vehicles, and digital learning tools.
- Launch of SIAM's official road safety mascot, "SIAM - Safe I Am", aimed at engaging young audiences.
- Community-driven activities including street plays, extempore competitions, a Road Safety Run, and VR-based road safety games.
- New initiatives like the SAFAR Summit, BNCAP education zone, and 2-wheeler ambulances were introduced.

Different Zones at SIAM सुरक्षित सफर *Pavilion*

Inauguration

The pavilion was inaugurated by the Union Minister of Road Transport and Highways, demonstrating the Ministry's continuous focus on reducing road traffic fatalities and promoting safe driving behaviour.

Honourable Union Minister, Shri Nitin Gadkari, MoRTH, Govt of India inaugurating SIAM सुरक्षित सफर *Pavilion*

Glimpses of Auto Expo - The Motor Show 2025










TVS

COMMERCIAL VEHICLES




AVINYA

TATA

SIERRA



SML ISUZU


PERSONAL



OLA
OLA


SIAM ANNUAL ACTIVITIES

August 2024

- SIAM Exports Group Delegation to Nepal
- SIAM Taxation Group Meeting, Aurangabad
- SIAM 10th Automotive Logistics Conclave
- Monthly Industry Data Release
- Monthly Economic Monitor

September 2024

- SIAM Automotive HR Conclave 2024, New Delhi
- Monthly Industry Data Release
- Monthly Economic Monitor
- 14th Meeting of the Recycling & Materials Group, POPs & Refrigerants.
- 3rd International conference observing World Biofuel Day 2024
- 72nd AISC Meeting at ARAI Pune, Maharastra
- Meeting with MoRTH on GNSS Tolling
- CIRT and BNCAP Facility Visit
- SIAM CV CEOs Council Meeting
- Two-Wheeler CEOs Council
- 2W CEOs Council Meeting at Bangalore
- SAFE Annual Convention 2024
- Visit to Bengaluru Traffic Management Centre
- SIAM SAFE Technology Conference
- Stakeholder Consultation with MHI on Electric Ambulances
- SIAM Frontier Technology Group Meeting, Bengaluru
- SIAM Electric Mobility Group Meeting, Bengaluru
- 2nd SIAM Green Plate EV Rally
- TED 29 panel meeting
- SIAM 2W Meeting on AVAS

October 2024

- SIAM Exports Group Meeting, New Delhi
- SIAM Meeting with Revenue Secretary, Ministry of Finance, Govt. of India on Taxation issues
- Quarterly Media Briefing on Automobile Industry performance, New Delhi
- Monthly Economic Monitor
- Meeting with Ministry of Steel, Govt. of India
- 19th Edition of SIAM JAMA Meetings in Maharashtra
- SIAM JAMA Two Wheeler Meetings in Maharashtra
- SIAM JAMA Emissions & CO2 Meetings in Maharashtra
- SIAM JAMA Fuel Group Meetings in Maharashtra
- SAFE Mobility Program
- MoRTH-DOT Taskforce meeting on V2X
- SIAM-JAMA Meetings, Lonavala
- Stakeholder consultation with MHI on PMP revision for EVPCS
- Stakeholder consultation with MHI on PMP revision for e-2W and e-3W
- 22nd Meeting of INC-IEC
- SIAM JAMA 2W Group Meeting
- SIAM - JAMA Meeting with ARAI on AIS 137
- 15th SIAM Three Wheeler Group Meeting
- Discussion on AIS 137 for SIAM JAMA ARAI meeting

November 2024

- SIAM Conference on Automotive Taxation
- SIAM - JAMA Meeting
- Meeting with Ministry of Finance, Govt. of India on Pre-Budget Recommendations
- SIAM Skill Group Meeting with Secretary, Ministry of Skill Development & Entrepreneurship, Govt. of India
- Monthly Industry Data Release
- Monthly Economic Monitor
- 3rd Meeting of Inter-Ministerial Committee (IMC) for 'Preparation of roadmap for ethanol blending beyond 2025'
- 67th SCOE Meeting at Chennai, Tamil Nadu
- 63rd Meeting of CMVR-TSC at Chennai, Tamil Nadu
- IMMA SCM Meeting
- V2X Taskforce Meeting with TEC, DoT
- Stakeholder consultation with MHI on PMP revision for e-buses

- Stakeholder Consultation with MHI on e-trucks
- Stakeholder Consultation on Scheme to Promote Electric Passenger Cars

December 2024

- SIAM Automotive Sourcing Conclave
- SIAM Economic Research Group Meeting
- Monthly Industry Data Release
- Monthly Economic Monitor
- 1st Meeting of the Sub-group on Refrigerants
- 1st Meeting of the Sub-Group on POPs & other hazardous material
- 4th Meeting of Inter-Ministerial Committee (IMC) for 'Preparation of roadmap for ethanol blending beyond 2025'
- Commercial Vehicle Members Meeting on CV Regulations at MTBD, Maharashtra
- 15th Sectional Committee meeting of TED27
- SIAM 2W Group Meeting

January 2025

- SIAM Auto Trade Dialogue
- Indo-German Working Group Meeting
- SIAM Taxation Group Meeting
- SIAM Auto Aatmanirbhar Zone at Bharat Mandapam, New Delhi
- SIAM Skill Group Meeting with Secretary, Ministry of Skill Development & Entrepreneurship, Govt. of India
- Release of Quarterly Automobile Industry Performance data
- Monthly Economic Monitor
- SIAM 3rd International Conference on Sustainable Circularity (ICSC) @ Bharat Mobility Global Expo 2025
- Meeting between OSP (Saudi Arabia) & SIAM on Areas of Alignment & Potential Collaboration
- SIAM 4th Global Electrification Mobility Summit (GEMS) @ Bharat Mobility Global Expo 2025
- SIAM 3rd International Symposium on Thriving Eco Energy in Mobility (ISTEM) @ Bharat Mobility Global Expo 2025
- SIAM 1st Summit for Automotive Future Advancement in Road Safety (SAFAR) @ Bharat Mobility Global Expo 2025
- National Road Safety Month
- "सुरक्षित सफर (Safe Journey) Pavilion @Bharat Mobility Global Expo 2025
- Electrification Pavilion @ Bharat Mobility Global Expo 2025
- Decarbonization Pavilion @ Bharat Mobility Global Expo 2025
- Recycling Pavilion @ Bharat Mobility Global Expo 2025
- 36th SIAM International Harmonisation Group Meeting
- Stakeholder Consultation meeting with Ministry of Heavy Industries on EV Chargers
- Green Hydrogen Workshop
- Meeting with MoCA on Battery Swapping
- 4th Global Electrification Mobility Summit

February 2025

- SIAM Looking Ahead Conclave
- Meeting with Ministry of Heavy Industries, Govt. of India and USA officials
- Monthly Industry Data Release
- Monthly Economic Monitor
- 15th Meeting of the Recycling & Materials Group
- 2nd Meeting of the Sub-group on Refrigerants jointly held with the Recycling & Material group meeting
- 1st Meeting of the Consultative Committee on EPR framework
- SIAM Participation at India Energy Week
- Road Safety Rolling Trophy to Schools by SIAM in association with Delhi Traffic Police
- Participation in 4th Global Ministerial Conference on Road Safety, Morrocco
- 5th Meeting of Inter-Ministerial Committee (IMC) for 'Preparation of roadmap for ethanol blending beyond 2025'
- Meeting to discuss CAQM-ZEV Roadmap for Delhi-NCR at CAQM Office
- SIAM Pavilion at India Energy Week 2025 at Yashobhoomi, New Delhi
- V2X Workshop by MIC Japan
- SIAM Electric Mobility Group Meeting
- SIAM - JAMA - ARAI Meeting on AIS 137 at ARAI Pune
- SIAM - JAMA - ICAT Meeting on AIS 137 at IMT

Manesar

- IMMA SCM Meeting
- 2W Meeting with CAQM

March 2025

- SIAM Exports Group Delegation to Sri Lanka
- SIAM Skill Group Meeting at Ministry of Skill Development & Entrepreneurship, Govt. of India for drafting National Policy for Skill Development and Entrepreneurship 2025
- Monthly Industry Data Release
- Monthly Economic Monitor
- 3rd Meeting of the Sub-group on Refrigerants
- 6th Meeting of Inter-Ministerial Committee (IMC) for 'Preparation of roadmap for ethanol blending beyond 2025'
- First Technical Committee Meeting on FE Norms of HDVs and other vehicle segments at BEE Office, New Delhi
- 17th Automotive Design Challenge (ADC) at New Delhi
- 19th Styling & Design Conclave at New Delhi
- Stakeholder consultation with MHI, NCL on Battery
- Taskforce meeting on V2X with TEC, DoT
- Stakeholder consultation with Niti Aayog on Electric Vehicles
- PLI Auto Conclave
- To SIAM 3W CEOs Council Members
- AVAS Study Meeting with IIT Delhi

April 2025

- SIAM Finance, Leasing & Insurance Group Meeting, New Delhi
- NITI Aayog Stakeholder Consultation on National Mission on Manufacturing (NMM) in New Delhi
- Release of Quarterly Automobile Industry Performance data
- Monthly Economic Monitor
- SIAM-KVS Road Safety Education & Awareness Program Launch
- SIAM Quality Compliance, Service, I&M and Certification Group Meeting
- SIAM Sustainable Mobility Group Meeting
- 1st Meeting of the Sectoral Technical Committee on Mobility for development of Climate Finance Taxonomy
- Multistakeholder consultation meeting on IBA-Diesel Blend Study
- 2nd Technical Committee Meeting on FE Norms of HDVs and other vehicle segments at BEE, New Delhi
- 7th Meeting of Inter-Ministerial Committee (IMC) for Preparation of Roadmap for Ethanol Blending Beyond 2025.
- 4th Technical Committee Meeting of Bharat NCAP 2.0 at SIAM, New Delhi
- ETD 51 Sectional Committee Meeting
- TED 28 sectional committee Meeting
- 6th Taskforce Meeting for the development and implementation of Intelligent Transportation System
- Stakeholder Consultation with MHI on EVPCS
- First meeting of Consultative Committee for adoption of TSDSI standard
- 55th SIAM 2W Group Meeting

May 2025

- DPIIT stakeholder consultation on Chain and Sprockets (Quality Control) Order, 2025
- Monthly Industry Data Release
- Monthly Economic Monitor
- 2nd Meeting of the Consultative Committee regarding the EPR framework
- Participation at International Motorcycle Manufacturer Association Meetings
- Road Safety Summer Camp
- SIAM Corporate Social Responsibility Group Meeting
- 3rd Technical Committee Meeting on FE Norms of HDVs and other vehicle segments at BEE Office, New Delhi
- 73rd AISC Meeting at ARAI Pune, Maharashtra
- Gas Based Mobility Group Meeting
- 37th SIAM International Harmonization Group Meeting at Mussoorie, Uttarakhand
- BNCAP 2.0 Group Meeting at Mussoorie, Uttarakhand
- Stakeholders Meeting - Upgradation of Testing Agencies
- SIAM Electric Mobility Group Meeting, Mussoorie
- SIAM CV CEOs Council Meeting
- IMMA Spring Congress
- BNCAP 2.0 meeting for 2Ws

June 2025

- Meeting with Revenue Secretary, Ministry of Finance, Government of India on Taxation Issues
- SIAM Human Capital Group Meeting, New Delhi
- SIAM Vehicle Classification Group Meeting, New Delhi
- Monthly Industry Data Release
- Monthly Economic Monitor
- 2nd Meeting of the Sectoral Technical Committee on Draft Framework of Climate Finance Taxonomy
- SIAM 5th International Conference observing World Environment Day, New Delhi
- SIAM Road Safety Stakeholders meeting
- Road Safety Summer Camp
- Uttarakhand State interaction
- Meeting with Ministry of Education on Road Safety Audits outside Schools
- Free PUC Drive observing World Environment Day 2025
- 5th International Conference observing World Environment Day
- Delhi NCR School Student Painting Competition observing World Environment Day
- Meeting at MHI to discuss the development of CAFE - III Norms for M1, N1 and FE Norms Medium & Heavy -duty vehicles.
- 68th SCOE Meeting at Mumbai, Maharastra
- 64th Meeting of CMVR-TSC at Chennai, Tamil Nadu
- TED 27 Sectional Committee meeting
- 7th Taskforce Meeting on V2X ITS
- Meeting with Secretary, MHI on e-trucks
- SIAM CV CEOs Council Meeting
- 2W CEOs Council Meeting
- SIAM- JAMA Two-Wheeler Group Meeting
- 16th SIAM Three Wheeler Group Meeting

July 2025

- SIAM Taxation Group Meeting, Pune
- Inaugural Meeting of Automotive Mission Plan (2025-2047)
- SIAM 11th Automotive Logistics Conclave
- Quarterly Media Briefing on Automobile Industry performance, Mumbai
- Pre-policy consultation meeting organised by RBI in Mumbai
- Meeting of SIAM CEOs with Shri Nitin Gadkari, Hon'ble Union Minister of Road Transport & Highways, Govt. of India
- Monthly Economic Monitor
- CEOs & Senior Industry Expert interaction with Minister MoRTH
- 16th Meeting of the Recycling & Materials group
- SIAM - PNGRB Roundtable Conference on Gas Based Mobility at New Delhi
- 32nd Meeting of Project Appraisal & Approval Committee (PAAC) for utilization of EPC funds with CPCB.
- Meeting with MoEF&CC on ELV definition & EPR.
- Meeting with CPCB on Discussion on Generation of EPR Credits from factory waste & fixation of percentage of metals in different kind of Batteries.
- Meeting with CPCB & producers on introduction of EPR Portal and implementation of EPR by CPCB.
- SIAM CSR Group Meeting
- IMMA Meeting with Mr Jean Todt, United Nations Special Envoy for Road Safety
- 3rd Meeting of PCD 03 Working Group on Higher Blends of Ethanol in Motor Gasoline
- Commercial Vehicle Members Meeting on CV Regulations at MTBD, Maharashtra
- 8th Meeting of Taskforce on ITS
- Meeting with Secretary MoRTH on ABS and Helmet
- 2W CEOs Council Meeting

SIAM MILESTONES

SEPTEMBER 2024

Amendment in Auto PLI Scheme to remove reference to FAME-II

OCTOBER 2024

Lauch of PM EDRIVE Scheme

NOVEMBER 2024

Amendment in PM EDRIVE for e-3W L5 advancement of funds

DECEMBER 2024

Compensation Cess paid to Merchant Exporters by OEMs for exporting vehicles reduced to 0.1%.

Steel Import Monitoring System portal of Ministry of Steel, Govt. of India updated based on SIAM's request, thereby streamlining the entry of the import legacy data since 1st January 2023.

Ministry of Steel, Govt. of India granted No Objection Certificates (NOC) to 298 import applications from OEMs and / or their suppliers, that were held up, in-spite of many of these grades not being manufactured locally in India.

JANUARY 2025

The Environment Protection (End-of-Life Vehicles) Rules, 2025 notified on 6th January 2025 - Government accepted the SIAM following major recommendations among the others:

- A clause on increasing use of recycled steel was deleted in the final rules notified
- A provision of 3% additional annual EPR cumulative targets was also deleted
- Main annual EPR Targets mandated for OEMs were also reduced from 10, 20, 30% in draft to 8, 13, 15% in final notification
- Use of other steel scraps generated from automobile manufacturing for generating EPR certificates (this is in addition of ELV steel scrap)

The Plastic Waste Management (Amendment) Rules, 2025 officially notified on January 23, 2025 - Rule 11, on marking & labelling of plastic packaging, significantly amended with

- he information may be shared via a Barcode or QR Code printed on the plastic packaging
- The details may also be provided in a Product Information Brochure with the packaging.

Context Paper release on ELV Recycling: Status of Circular Economy in India at SIAM's 3rd ICSC.

FEBRUARY 2025

Battery Waste Management Amendment Rules, 2025 notified on February 24, 2025

a. Amended rules allowed printing a barcode or QR code with the EPR registration number on any of the following:
   - Battery or battery pack
   - Equipment containing a battery
   - Packaging of either
   - Bulk packaging (not for retail sale)

b. Placing the EPR registration number on the product information brochure

MARCH 2025

Expansion of scope of amnesty scheme by providing waiver for interest and penalty for the period before March 2020 on demands raised, where tax liability is fully paid.

On SIAM's request, DGFT / DPIIT allowed further exemption to additional 27 Tyre sizes from the requirement of BIS certification and QCO.

DGTR issued a notification exempting some of the critical steel grades (submitted by SIAM) from imposition of Safeguard Duty.

Notification of revised PMP guidelines for e-2W.e-3W and e-buses

APRIL 2025

Finalization of White Paper on Diesel: A Cleaner & Sustainable Fuel @ Sustainable Mobility Group Meeting

First taskforce report on ITS for V2X

MAY 2025

Draft Guidelines on Environmental Compensation (EC) under the Used-Oil EPR framework issued on May 21, 2025. The guidelines envisage EC Certificate Trading (EPR Certificates)

- EC pricing for under collection certificates must be between 30% to 100% of the "fixed" EC rate — this defines a minimum maximum trading band
- Ensures predictable, fair, and regulated pricing in secondary EPR certificate exchange

JUNE 2025

Implementation of Machinery and Electrical Equipment Safety (Omnibus Technical Regulation) Order, 2024 deferred to 1st September 2026 form the earlier implementation date of 28th Aug 2025.

JULY 2025

Inclusion of 30 additional tyre sizes in the QCO Exemption List notified by DPIIT

EPR for Non-Ferrous Metals Rules notified on 1st July 2025 - Exemption of Automobile Sector from the purview of Rules

Launch of Operational Guidelines for e-trucks under PM-EDRIVE Scheme

Notification of revised PMP guidelines for EVPCS


AUTOMOTIVE MISSION PLAN 2025-2047


SIAM


Indo-German Working

SIAM

Society of Indian Automobile Manufacturers

ECONOMIC & COMMERCIAL AFFAIRS

EXPORTS GROUP

SIAM Exports Group has been playing a pivotal role in augmenting the exports of vehicles across various markets. More than 5.3 million unit of vehicles were exported in the year 2024-25. The value of exports of the automobiles increased by 14% compared to the previous year The Indian OEMs have been exporting to markets like Africa: Nigeria, South Africa; Latin America: Chile Colombia, Mexico; Neighbouring markets: Bangladesh, Nepal, Sri Lanka; Middle east: Saudi Arabia and UAE and Philippines in ASEAN, among others.

SIAM continues to strengthen Brand India via delegations and global trade dialogues.

The Group highlighted various market access concerns of the OEMs though stakeholder consultations organised by Ministry of Commerce under the chairmanship of Hon'ble Commerce Minister. The group also participated in a stakeholder consultation organised by Ministry of Commerce with High Commissions of three countries viz, Bangladesh, Indonesia and Vietnam and highlighted the challenges faced by Indian OEMs while exporting vehicles to these markets. The group also participated in a stakeholder consultation organised by Engineering Exports Promotion Council (EEPC) with a session focus on contribution of automobile exports to engineering sector.

SIAM Exports Group, in its endeavour to increase Indian automobile exports and build "Brand India" in rest of the world, mounted a delegation visit to Kathmandu, Nepal in August 2024 during the Nepal Auto Show 2024 organized by NADA Automobiles Association of Nepal. The delegation included participation from all vehicle segments of auto industry with presence of major auto OEMs from India, including Ashok Leyland, Ather Energy, Bajaj Auto, Hyundai Motor India, Isuzu Motors India, Mahindra & Mahindra, Renault India, Renault Nissan Technology & Business Centre India, Tata Motors, TVS Motor Company and VE Commercial Vehicles. SIAM members met Hon'ble Deputy Prime Minister and Finance Minister in Nepal, Hon'ble Minister of Physical Infrastructure and Transport in Nepal, and Hon'ble Minister of Industry, Commerce and Supplies in Nepal, along with members of NADA Automobiles Association of Nepal.

SIAM Delegation to Nepal

As the market of Sri Lanka opened up for CBU vehicle imports starting October 2024 which was also being perused by SIAM Exports group. In view of this, the group organised a delegation to Sri Lanka in March 2025 and met all the relevant Government departments viz, Ministry of Industries and Entrepreneurship Development, Ministry of Finance, Board of Investment (BOI). The delegation also met the Indian Deputy High Commissioner and First Secretary in Sri Lanka and apprised him about the discussions held with Sri Lankan Stakeholders. SIAM also met the counterpart association Ceylon Motor Trader's Association (CMTA) who also hosted a networking event for the SIAM delegation, which was also attended by the Deputy Minister of Industries & Entrepreneurship Development and Chairman BOI. The Delegation included from SIAM members viz. Ashok Leylend, Ather Energy, Bajaj

Auto, Force Motors, India Yamaha, Mahindra & Mahindra, Royal Enfield, Suzuki Motorcycles, Tata Motors, TVS Motor Company and VECV.

The Indian OEMs during the discussions requested

Meeting with Deputy High Commissioner of India in Sri Lanka, Mr Satyanjal Pandey along with First Secretary, Mr Saurbah Sablok

Meeting with DG - Fiscal policy, Ministry of Finance, Dr. M.K.C. Senanayake

Meeting with members of Ceylon Motor Traders Associaton

the Sri Lankan Government that with lifting of import restrictions, a policy balance between imports and localisation operations be maintained suitably as some of the Indian OEMs have their operations in Sri Lanka. Delegation mentioned that as and when the Sri Lankan Government plans to move to the advanced stage of emission norms, if the inclusion of BSVI norms could also be considered to be written exclusively in the policy. Some of the Indian vehicle manufacturers have established their vehicle assembly plants in Sri Lanka and are ready to support the component industry development in the country and share the know-how. It was also highlighted that the current SOP for local assembly mandates progressive localisation for vehicles which could become a challenging task for OEMs as there is limited vendor base in Sri Lanka. Hence, SIAM Delegation requested that the SOP may be suitably moderated.

The Exports Group also jointly organised the 11th

Meeting with Hon'ble Minister Industry and Entrepreneurship Development, Mr Sunil Handunnetti, M.P

Meeting with, Senior Deputy Director, Mr Upul Jayasinghe and other officials from Board of Investment

SIAM Exports Group Meeting

SIAM visit to NADA Auto Show 2025

edition of SIAM Auto Trade Dialogue with SIAM IR&TP Group during the Bharat Mobility Global Expo 2025 which witnessed participation from about ten countries. In August 2025, SIAM secretariat also visited NADA Nepal Auto Show 2025, held at Kathmandu, Nepal and participated in the International Auto Trade Dialogue organised during the show.

Key Deliverables & Activities 2024-25

Deliverable:	**Stakeholders:**
Strategies to increase Indian automobile exports and its presence	Members, Government, Counterpart Auto association
Key Activities/Measures:	
Delegation Visit to Nepal and Sri Lanka	
Deliverable:	**Stakeholders:**
Resolve Non-Tariff Barriers in Export Markets	Membership and Government
Key Activities/Measures:	
Participated in ministerial stakeholder consultations to highlighted non-tariff barriers in Bangladesh, Brazil, Chile, Indonesia, Philippines and South Africa.	

INTERNATIONAL RELATIONS & TRADE POLICY GROUP

SIAM International Relations and Trade Policy Group has been keenly watching the key trade policy developments around the world and has been actively involved in various trade negotiations initiated by Government of India.

This group has been giving its recommendations for various other ongoing trade negotiations such as with Chile, the European Union, New Zealand, Peru, the United States, the United Kingdom etc. on tariffs, rules of origin and auto annexes. The group is also consulted by the Government for providing discussion points for the Joint Trade Committee meetings organised by the Government of India with various countries.

India has signed a Comprehensive Economic and Trade Agreement with the United Kingdom on 24th July 2025 after three years of extensive stakeholder consultations. Brief of Tariff Commitments for vehicles under India-UK CETA is given below:

SIAM engaged closely in EU/US trade negotiations, hosted major international Automotive Trade dialogue and also shaped India-UK CETA outcomes.

Passenger Vehicles: The in-quota duty for ICE Passenger Vehicles has been reduced to 10% by the 5 years. Total quota units for ICE to increase from 20,000 units to 37,000 units in the 5th year and reduce to 15,000 units from 15th year onwards. The quota is spread across sub-categories based on engine size. The out of quota duty reduction for ICE Passenger Vehicles above 1500 cc has been reduced from to 50% in 10 years and for engine size upto 1500 cc has been reduced to 45% in 10 years. Duty reduction has also been offered for Electrified Passenger vehicles under quota (TRQ) only. Duty under quota to be reduced from 6th year to 10% by the 10th year for vehicles above £40,000 CIF. Different volume of quota units has been offered for vehicle value between £40,000 CIF to £80,000 and above £80,000. Total quota units for Electrified PVs to start from 4,400 units in the 6th year and increase to 22,000 units from 15th year onwards.

Two Wheelers: Duty Reduction from 55% to 22% by 10th year for all categories of ICE Two Wheelers.

Commercial Vehicles (Buses and Trucks): The in-quota duty reduction for ICE Trucks to reduce to 8.8% in 5 years. The quota units to increase from 2,500 in the 1st year to 3,500 units in the 5th year and retained thereafter. The out of quota duty for Trucks to be reduced to 22% in 10 years. Duty reduction for ICE Buses has only been given for out of quota. Duty for ICE Buses to reduce to 22% in 10 years.

Exclusions (no duty reduction offered): Second hand vehicles, Three wheelers, CKD & SKD units of all vehicle categories and Electrified vehicles under Two Wheelers, Trucks and Buses.

The UK has also eliminated its duties for all categories of vehicles except for Electrified Passenger Vehicles where duties have been reduced under quota (TRQ) only.

Presently, the group is actively engaged in providing inputs to Government of India for the ongoing negotiations with European Union and United States of America.

The IR&TP group organised the 11th edition of Auto Trade Dialogue on the sidelines of Bharat Mobility Global Expo 2025, themed 'Changing Paradigm of Global Trade Practices in the Auto Sector' on 20th January 2025. The Dialogue witnessed participation from auto associations of about seven countries viz, The Society of Motor manufacturers and Traders Limited (SMMT) - United Kingdom, German Association of the Automotive Industry (VDA) - Germany, European Automobile Manufacturers' Association (ACEA) - European Union, Ceylon Motor Traders Association (CMTA) - Sri Lanka, NADA Automobile Association of Nepal, Japan Automobile Manufacturers Association, Egypt Automotive. The High Commissioner of Brazil, Deputy High Commissioner South Africa, Director General of Ministry of Transport, Germany along with Senior officials from Government of India also marked their presence in the event. The discussions during the dialogue were focussed on investments, localisation policies and building resilience in evolving global trade scenario.

11th Auto Trade Dialogue

The group also organised an interactive session in association with E&Y India on the reciprocal tariffs imposed by the United States and its impact on the Indian Automobile Industry to gain insights on export opportunity for the Indian OEMs and maximising the benefits for India in comparison to other countries.

The group hosted a delegation from Japanese Automobile Manufacturers Association in November 2024 for a Joint Working Group Meeting between Ministry of Heavy Industries, Govt of India and Ministry of Economic, Trade and Industry (MEITY), Govt of Japan. A meeting of the Indo-German Working Group between the Ministry of Heavy Industries Government of India and Federal Ministry of Digital and Transport (BMDV), Government of Germany was also facilitated by this group. A delegation of the Russian Automobile Dealers Association (ROAD) was also hosted by this group to explore the potential partnerships with industry stakeholders.

Indo German Working Group Meeting, New Delhi

India Japan Working Group Meeting, New Delhi

Meeting with Russian Automobile Dealers

Key Deliverables & Activities 2024-25

Deliverable:	**Stakeholders:**
Maintaining International Dialogue	Membership, International Auto Associations, High Commissions, Government
Key Activities/Measures:	
Organizing the SIAM Auto Trade Dialogue with participation from counterpart auto associations, High Commissions of various countries. Recommending discussion points to Government of India for various G2G visits.	
Deliverable:	**Stakeholders:**
International Trade Agreements	Membership and Government
Key Activities/Measures:	
Submitting recommendations and participating in stakeholder consultations organised by the Government for ongoing trade negotiations such as Chile, The European Union, New Zealand, Peru, the United States etc.	

SKILLING GROUP

As the Indian automotive industry undergoes a significant transformation, driven by advances in technology, digitization, and evolving consumer expectations, there is a growing need for a workforce that is not only technically sound but also future-ready. Recognizing this need, the Society of Indian Automobile Manufacturers (SIAM), through its Skilling Group, has been at the forefront of preparing young talent for emerging opportunities across the automotive value chain.

The Skilling Group's mission is clear: to build a robust pipeline of job-ready professionals capable of stepping into roles within dealerships and OEMs from day one. To achieve this, SIAM has been working closely with industry partners, and educational institutions to ensure that skilling initiatives are aligned with real-world demands.

SIAM Skilling Group piloted a 60-hour training module, at 9 ITIs across India with active involvement from SIAM members and ASDC.

One of the Group's key initiatives this year was a nationwide skill gap analysis focused on Service Technicians and Service Advisors. The study, conducted across several Industrial Training Institutes (ITIs), highlighted critical areas where current curricula falls short of industry requirements.

To address the identified skill gaps, SIAM developed a focused 60-hour training module tailored to industry needs. This specialized program was piloted in nine ITIs across the country, beginning with training of faculty members, who subsequently delivered the course to students at their respective institutes. Upon completion, students underwent an assessment, followed by the awarding of certificates. The curriculum, informed by detailed survey findings, is designed to strengthen practical competencies, enhance service readiness, and improve overall employability. This was executed , monitored and concluded at 9 ITI's across India with active involvement from member OEM's , ASDC & SIAM marking an end to this skilling group Initiative.

This collaboration between academia and industry aims to facilitate a smoother transition from education to employment. SIAM launched the Handbook for Service Advisors and Service Technicians during SIAM Automotive HR Conclave held on 25th September 2024 in New Delhi. SIAM also presented the 60-hour training module to Ministry of Skill Request to integrate Service Advisor and Service Technician qualifications into the ITI Mechanic Motor Vehicle (MMV) trade curriculum to equip trainees with both technical and customer service skills, aligning the program with current industry requirements.

During FY 2024–25, the SIAM Skill Group closely collaborated with the Ministry of Skill Development and Entrepreneurship (MSDE) in shaping key national skilling policies and initiatives. The Group provided critical industry inputs for drafting the guidelines of the new scheme for upgrading Industrial Training Institutes (ITIs), as announced in the Union Budget 2024–25. These contributions helped define the automotive sector's role in the scheme's implementation.

The Skill Group also participated in the stakeholder consultation organized by MSDE on 12th March 2025, offering valuable inputs toward the drafting of the National Policy for Skill Development and Entrepreneurship 2025.

SIAM Handbook on Service Technicians and Service Advisors presented to Ms. Trishaljit Sethi, Additional Secretary/Director General (Training), Ministry of Skill Development and Entrepreneurship (MSDE) on 24th Oct 2024.

SIAM Skilling Group with Secretary, MSDE for drafting the guidelines of new scheme on upgradation of ITIs 25th Nov, 2024

SIAM Senior Leadership with Secretary, MSDE for discussing the role of industry in the new scheme on upgradation of ITIs announced in Union Budget 24-25 on 7th Jan, 2025

SIAM Skilling Group with Secretary, MSDE for drafting the guidelines of new scheme on upgradation of ITIs 25th Nov, 2024

Key Deliverables & Activities 2024-25

Deliverable:	**Stakeholders:**
Workforce upskilling	Vehicle manufacturers/ Dealerships
Key Activities/Measures:	
• Listing core critical job roles • Conducted Skill-Gap Survey on the five competencies required for identified job roles at ITI and Polytechnic colleges (Pan-India) • Creation of a 60 hours Skill bridging curriculum for ITI automotive trade students • Conducted the students training at nine ITIs as per the curriculum • Assessment of the ITI students post course • Distribution of Certificates to the ITI Students undertaken course and respective Faculty	
Deliverable:	**Stakeholders:**
Workforce upskilling	IT Students & ITI Faculty
Key Activities/Measures:	
Distribution of Certificates to the ITI Students undertaken course and respective Faculty	

Launch of "SIAM Handbook for Service Advisors and Service Technicians" during SIAM Automotive HR Conclave 2024, New Delhi

TAXATION POLICY, PROCEDURAL & DIRECT TAX GROUP

The SIAM Taxation Policy & Procedural & Direct Tax Group has been putting considerable efforts in advocating for streamlining various taxation policies, procedures impacting the Indian automobile Industry. The group has been proactively engaged with the officials of Ministry of Finance for giving its recommendations to the Government on multiple issues impacting the wide cross section of SIAM membership.

This group also submits its recommendations for Union Budget to the Ministry of Finance and represents the automobile industry in stakeholder consultations chaired by Revenue Secretary and other ministry officials for Pre-Budget.

SIAM engaged in taxation reforms through policy advocacy, budget recommendations, stakeholder consultations and hosted 1st Automotive Taxation Conference.

Some of the key pre-budget recommendations submitted by this group for 2025-26 were, Allow refund of ITC on Input Service & Capital Goods due to inverted duty structure of Electric Vehicles, expansion of exempted list of capital goods for manufacturing and R&D of Li-ion cells, extending concessional customs duty for import of vehicles used for testing/ R&D to OEMs, allowing Input Tax Credit on vehicles used for R&D activities, minimising classification dispute of auto parts arising due to differential GST rates of auto parts & components, rate rationalisation for companies having significant economic presence in India, and retrospective withdrawal of indexation benefit on long term capital gains.

The group also met the newly appointed Revenue Secretary to apprise him about the ongoing issues in taxation impacting the auto industry.

Meeting with Revenue Secretary at Ministry of Finance

Many of the recommendations made by this group were accepted by the Ministry in the last year and suitable clarifications were issued. Some of these recommendations were 1) Exemption from Customs Duty on import of Capital Goods required for Manufacturing of Li-ion Cell of batteries of EVs. 2) Expansion of the scope of amnesty scheme to provide waiver for interest and penalty for the period before March 2020 in case of order confirming demand for period beyond March 20202 also. 3) The supplies made by domestic supplier to merchant exporter were only receiving concessions for the GST rate paid; after SIAM's request it was also extended to the compensation cess paid. This has resulted in reducing administrative work and fund blockage for the OEMs. 4) The definition of SUVs was amended by the Government in July 2023 for the applicability of Compensation cess. However, the ambiguity on the timeline of applicability of the new definition impacting the Compensation cess was clarified for prospective applicability of the new definition following submissions made by SIAM. This resulted in huge relief to OEMs for resolving the potential risk on tax demands due to differential cess.

SIAM Taxation Group Meeting, Pune

SIAM Taxation Group Meeting, Aurangabad

The SIAM Taxation Policy & Procedural Group organised the first edition of Automotive Taxation Conference, themed 'Evolving Taxation Landscape of the Auto Industry for Nation Building', wherein senior officials of Ministry of Finance also participated in the panel other than the Automobile Industry experts. The conference included insightful discussions on Opportunities to Further Simplify GST, Alignment of Customs Valuation with Transfer Pricing, Digital Transformation and Ease of Doing Business in the Taxation Regime.

SIAM Automotive Taxation Conference, New Delhi

SIAM Automotive Taxation Conference, New Delhi

SIAM Automotive Taxation Conference, New Delhi

Key Deliverables & Activities 2024-25

Deliverable:	**Stakeholders:**
To analyse the changes in taxation policy and procedures impacting the Auto Industry	Membership and Government
Key Activities/Measures:	
• Submitting Pre-Budget recommendations to the Government of India • Analysing the policy, circulars released by CBIC, announcements in the Union Budget and its impact on the auto industry	
Deliverable:	**Stakeholders:**
Maintaining a dialogue of Government and relevant stakeholders with industry	Membership and Government
Key Activities/Measures:	
Organising the Automotive Taxation Conference with presence from Government of India and Automotive Industry stakeholders and knowledge firms.	

HUMAN CAPITAL GROUP

SIAM Human Capital Group (HCG) focuses on advancing initiatives in Human Resources (HR), Industrial Relations (IR), labour dynamics, benchmarking, and performance evaluation within the Indian Automobile sector. The Group operates under five broad areas of Policy Advocacy, Talent Attraction & Retention, Talent Capability, Organization Effectiveness, and Workplace Harmony. Under these areas, suitable activities are driven by HR leaders from SIAM members.

SIAM HCG continues to undertake benchmarking surveys on best practices followed in HR in Auto industry, promote DEIB in the sector, and organize interactive sessions.

In 2024-25, SIAM partnered with Deloitte India for the Annual Performance and Rewards Study. The study aims to gauge the rewards competitiveness of SIAM members and provide data backed insights for informed performance, increment, and rewards decisions. Beyond compensation metrics, the survey offers invaluable insights into industry performance projections, performance management methodologies, productivity analysis, and more. This year's survey saw participation from over 25 members. Industry benchmarking exercises were also undertaken on various HR policies on request of SIAM members, empowering them to appraise their company policies against industry standards.

The Group successfully organized the SIAM Automotive HR Conclave on September 25, 2024. The event featured eminent speakers including CHROs from SIAM member companies, HR tech experts, Chief Diversity Officers, and representatives from Academia and Government. Key topics of discussion included talent capability building, HR tech transformation, Diversity, Equity, Inclusion & Belonging (DEIB) in the automotive industry, and future mobility workforce skilling. The conclave witnessed active participation from nearly 150 professionals across the Automotive ecosystem.

The Group organizes Case Study presentations

SIAM Automotive HR Conclave, New Delhi

and Best Practice sharing sessions to promote continuous learning within the Auto industry. The Group organized a session on Role-Based Organization Structures. Additionally, the Group invited speakers from industries outside the Auto sector to share insights on Talent Development, enabling members to learn from cross-industry best practices and apply relevant strategies within their organizations.

SIAM Human Capital Group has initiated a study titled "Employment Generated by the EV Industry in India," which is in its final stages and intended for submission to the Ministry of Heavy Industries, Government of India. This study provides a comprehensive assessment of the EV employment landscape in India, including direct and indirect job creation, segment-wise employment distribution, and key workforce trends influencing the sector.

SIAM Human Capital Group Meeting, New Delhi

In support of DEIB initiatives, SIAM Human Capital Group has also been associated with the Bill & Melinda Gates Foundation on a project focused on enhancing women's participation and progression in the Automotive workforce. This initiative supports participating companies in identifying structural barriers to gender parity and developing actionable strategies to improve workplace policies, hiring practices, and overall working conditions.

Key Deliverables & Activities 2024-25

Deliverable:	**Stakeholders:**
To work on HR and IR related issues in Auto sector	Membership
Key Activities/Measures:	
• Annual Performance and Compensation Rewards Study 2024-25 • Benchmarking survey on practices followed in the industry for Long Term Incentive Scheme	
Deliverable:	**Stakeholders:**
To work on HR and IR related issues in Auto sector	Members, Academicians, Government and Industry experts
Key Activities/Measures:	
Organized Automotive HR Conclave with a focus on "Shifting Gears: HR Strategies for a Disruptive Automotive Landscape"	
Deliverable:	**Stakeholders:**
Conduct research on Employment Statistics in Auto sector	Membership and Government
Key Activities/Measures:	
Initiated study on "Employment Generated by the EV Industry in India," which is in its final stages.	
Deliverable:	**Stakeholders:**
Promote Gender diversity and Women's participation in Auto sector	Members and Bill and Melinda Gates Foundation
Key Activities/Measures:	
Women in Auto sector project	

LOGISTICS GROUP

SIAM Logistics Group intensified talks with the Railways, hosted the 11th Automotive Logistics Conclave, and recognised LSPs for their contribution in green, tech-driven & safety practices.

The SIAM Logistics Group is dedicated to "Enhancing Efficiencies in Automotive Logistics," constantly exploring the latest innovations and strategies within the sector. Our unwavering commitment is focused on addressing and overcoming challenges faced by automobile OEMs, with a particular emphasis on solutions that alleviate logistical hurdles and reduce outbound logistics costs.

In our pursuit of minimizing carbon footprints and emissions while also cutting logistics expenses, we have engaged in ongoing discussions with the Railways. This collaboration has led to a notable increase in the use of railways for passenger vehicle transportation over recent years. We are also exploring the creation of dedicated railway hubs for vehicle transportation to streamline loading and unloading processes, as well as enhancing infrastructure at key stations.

Additionally, the SIAM Logistics Group organised the 11th edition of the SIAM Automotive Logistics Conclave on 18th July, 2025 in New Delhi. The conclave served as a key platform for engaging with stakeholders from the Railway Board, the Department for Promotion of Industry and Internal Trade (DPIIT), logistics service providers, and vehicle manufacturers. Discussions during the event centred around targeted interventions required to enhance the efficiency and integration of rail and road logistics in the automotive sector.

SIAM Automotive Logistics Conclave

As part of the conclave, SIAM also recognised outstanding contributions by Logistics Service Providers (LSPs) across various categories. Awards were also presented for best practices in Green Initiatives, Adoption of New Technologies, Operational Efficiency, and Safety Enhancement, highlighting the industry's commitment to sustainable and innovative logistics solutions.

SIAM Automotive Logistics Conclave

Key Deliverables & Activities 2024-25

Deliverable:	**Stakeholders:**
Enhancing Outbound Logistics Efficiency in the Automotive Sector	Membership and Government
Key Activities/Measures:	
Group engaged with the Railway Board to address issues related to availability of railways for automobile shipment and associated freight charges.	
Deliverable:	**Stakeholders:**
Enhancing Outbound Logistics Efficiency in the Automotive Sector	Membership, Logistics Service Providers and Government
Key Activities/Measures:	
• Group engaged with the Logistics Service Providers (Rail) for preparing proposal to Railway Board the uniform loading/unloading durations • Group engaged with the Logistics Service Providers (Road) to enhance efficiencies in automotive logistics • Group successfully organized Logistics Conclave, with related stakeholders including policy makers for collaborative exchange of insights and ideas.	

AATMANIRBHAR BHARAT – SOURCING GROUP

SIAM Aatmanirbhar Bharat Sourcing Group has been making efforts in ensuring localization in the auto industry, to complement the Government's initiative of Aatmanirbhar Bharat. The Aatmanirbhar Bharat Sourcing Group organized the 2nd edition of SIAM Sourcing Conclave with a focus on building a resilient supply chain, in New Delhi, marking the presence of industry stakeholders and key government officials.

SIAM Automotive Sourcing Conclave

To foster collaborative efforts by the industry, during the Bharat Mobility Global Expo 2025 at Pragati Maidan, the group exhibited 'Auto Aatmanirbhar Zone' showcasing critical components where localization efforts have already started along with the items where localization is yet to commence.

Auto Aatmanirbhar Zone

The group consistently engaged with the Government of India in highlighting concerns with respect to Steel and Steel products, especially the Anti-dumping duty investigation initiated by Directorate General of Trade Remedies (DGTR). The need to import certain specific grades of steel was highlighted due to domestic unavailability, owing to capability and capacity constraints.

The group also highlighted concerns with respect to the QCO on Omnibus Technical Regulations (OTR) and was able to defer the implementation by 1 year. The group has also been actively advocating for easing out the

SIAM advanced the localization agenda through the SIAM Sourcing Conclave and Auto Aatmanirbhar Zone along with policy advocacy and supply chain monitoring.

export restrictions imposed by China on exports of Rare Earth Magnets and have been continuously highlighting supply side challenges to the Government of India.

The group remained engaged with the Automotive Tyre Manufacturers Association (ATMA), for inclusion of tyre sizes, that are not manufactured domestically in the exemption list, in the Exemption List of Pneumatic Tyre Quality Control Order (QCO). With significant efforts of the industry, the majority of the tyres are domestically procured and only the sizes not available domestically are imported.

A Supply Chain Regulation Monitor has also been put in place by the Group which aims to provide regular updates on the regulations/QCOs impacting the auto industry.

SIAM also participated in various sectional committee meetings related to Steel, organized by Metallurgical Technical Department (MTD-4 and MTD-16) of Bureau of Indian Standards (BIS).

Meeting with Honourable CIM

Auto Aatmanirbhar Bharat Zone at, Bharat Mobility Global Expo 2025

SIAM Steel Sub-Group Discussion, New Delhi

Key Deliverables & Activities 2024-25

Deliverable:	**Stakeholders:**
Increasing Localisation in the Auto Industry	Membership and Government
Key Activities/Measures:	
• Organised Aatmanirbhar Bharat Sourcing Conclave with a focus on "Towards Building a Resilient Supply Chain" • Localization Zone during Bharat Mobility Global Expo 2025	
Deliverable:	**Stakeholders:**
To Mitigate Challenges in Automotive Supply-Chain	Members, ACMA and Government
Key Activities/Measures:	
Deferment of Machinery and Electrical Equipment Safety (Omnibus Technical Regulation) Amendment Order, 2025	
Deliverable:	**Stakeholders:**
To Mitigate Challenges in Automotive Supply-Chain	Members, ATMA and Government
Key Activities/Measures:	
Exempted additional tyres from the QCO on Pneumatic Tyres	
Deliverable:	**Stakeholders:**
To Mitigate Challenges in Automotive Supply-Chain	Members, ISA and Government
Key Activities/Measures:	
Representation on Safeguard Duty on Imports of Steel and Steel Products	

ECONOMIC RESEARCH GROUP

SIAM Economic Research Group (ERG) continues to engage actively to derive valuable insights into the automotive market, enabling data-driven decision-making.

The 19th edition of SIAM Looking Ahead Conclave was organized in February 2025. The theme of the conclave was "Towards Sustaining Growth and Enhancing Exports". The conclave provided perspectives on the need to continuously innovate to meet the aspirational requirements to leverage domestic and export opportunities. The Conclave provided projections of different vehicle segments - Passenger Vehicles, Commercial Vehicles, Three Wheelers, and Two Wheelers - in the Indian market for the year ahead. During the conclave, awards were presented to the knowledge partners, in recognition of their expertise, analytical insights, and deep understanding of economic and sectoral trends, which have played a vital role in enhancing the accuracy of market forecasts.

19th SIAM Looking Ahead Conclave, New Delhi

Every year, the group also undertakes the exercise of estimating the contribution of the Indian Automotive Industry to the overall GDP of the country, by taking into consideration several factors. The automotive turnover for the year 2024-25 is estimated to be more than Rs 20 lakh crores. A total of about Rs 3.37 lakh crores is estimated to be the GST Contribution by the auto industry, accounting for more than 15% of the total GST Revenue Collection.

As desired by EnC Group, a study was undertaken to forecast ethanol demand for automobiles (Passenger Vehicles and Two-wheelers) in India until FY2030. The study assessed the evolving powertrain mix in the passenger vehicle and two-wheeler segments, analyzed fuel consumption trends, and projected ethanol demand basis the same. The group also undertook the exercise to assess the economic impact of implementation of CAFE regulations on N1 vehicles in collaboration with SIAM EnC Group.

The group also provided inputs on National Mission on Manufacturing (NMM), being prepared by Niti Ayog.

SIAM ERG continues to engage actively to derive valuable insights on the Automotive market, enabling data-driven decision-making.

Inaugural Meeting on Automotive Mission Plan 2025-2047, New Delhi

Inaugural Meeting on Automotive Mission Plan 2025-2047, New Delhi

SIAM ERG is also actively coordinating the preparation of the Automotive Mission Plan 2025-2047 under the aegis of the Ministry of Heavy Industries (MHI). MHI has also constituted an Apex Committee for preparation of AMP III, along with chapter specific Sub-committees with nominations from all the major stakeholders including government ministries, research institutes, academia, automobile and auto component industry.

An Economic Monitor is also shared every month, which provides information on various Economic parameters impacting the Auto Industry.

Key Deliverables & Activities 2024-25

Deliverable:	**Stakeholders:**
Industry Forecast	Membership
Key Activities/Measures:	
Organized 19th Looking Ahead Conclave with a focus on "Towards Sustaining Growth and Enhancing Exports"	
Deliverable:	**Stakeholders:**
Studies / Analysis	Membership and Government
Key Activities/Measures:	
• Ethanol Demand Estimation for the Auto Industry beyond 2025 • CAFÉ regulations for N1 vehicles in India	
Deliverable:	**Stakeholders:**
Contribution to the economy	Membership and Government
Key Activities/Measures:	
Highlighted the achievements of the Indian Auto Industry to the government	
Deliverable:	**Stakeholders:**
Automotive Mission Plan III (AMP III)	Membership and Government
Key Activities/Measures:	
Automotive Mission Plan 2025-2047	

FINANCE, LEASING AND INSURANCE GROUP

SIAM Finance, Leasing and Insurance Group continues to work on the Finance, Leasing, and Insurance matters related to Motor Vehicles.

The Indian Automotive industry is witnessing a transformative shift towards sustainable mobility, aligned with the Government of India's net-zero vision. The Government has been proactively supporting alternative powertrain technologies, including Electric Vehicles (EVs), through a range of policy interventions. As electrification gains pace across vehicle segments, ensuring accessible and affordable financing becomes crucial for mass adoption of EVs.

SIAM is enabling collaboration among OEMs, financial institutions and regulators to address structural challenges and develop innovative solutions in EV financing.

Recognising this imperative, SIAM Finance, Leasing and Insurance Group has been working towards facilitating greater engagement among key stakeholders including OEMs, financial institutions, regulators, and industry bodies to address the structural challenges and explore innovative solutions in EV financing, leasing, and insurance.

In line with this, recent interactions coordinated by the Group highlighted several emerging trends, issues, and possible interventions in EV financing. Key challenges such as the need for a strong credit profile, uncertainties around battery life and resale value, and limited participation of private banks especially in the 2W and 3W segments have been discussed. Financing innovations like Battery-as-a-Service (BaaS) and dual loan structures for separate battery and chassis financing were identified as promising enablers. Stakeholders have also stressed the importance of targeted government support, OEM-enabled resale guarantees, and expanded roles for PSU banks.

On the leasing front, the Group has been engaging with leasing firms and OEMs to understand operational challenges and structural gaps. Leasing remains metro-centric and constrained by supply-side limitations. To address this, discussions have been focussing on the need for residual value guarantees, OEM-developed subscription models, and harmonization of GST rates to make leasing more attractive and scalable.

In the vehicle insurance domain, the Group has noted the impact of the 5-year third-party insurance mandate on 2W affordability and its potential to limit EV adoption in price-sensitive markets. The need for EV-specific insurance products, especially for battery, motor, and charging equipment has been highlighted.

Going ahead, the Group would continue to engage closely with stakeholders to build a supportive framework for vehicle financing, leasing, and insurance. The Group plans to hold regular interactions with key institutions such as RBI, MoRTH, IRDAI, banks as well as NBFCs, to advance practical and scalable solutions.

SIAM Finance, Leasing & Insurance Group Meeting, New Delhi


SIAM Finance, Leasing & Insurance Group Meeting, New Delhi

Key Deliverables & Activities 2024-25

Deliverable:	**Stakeholders:**
To address challenges faced by Auto industry in Vehicle Finance, Leasing & Insurance domain	Membership, Banks and Leasing Companies
Key Activities/Measures:	
Session with Financiers and Leasing Companies on opportunities in EV financing and Vehicle Leasing	

VEHICLE CLASSIFICATION, SALES REPORTING & ANALYSIS GROUP

SIAM Vehicle Classification, Sales Reporting & Analysis Group has been actively engaged in strengthening the robustness of Auto Industry monthly and quarterly performance which is released to a wide variety of stakeholders including SIAM members, Government and Media. Industry performance insights and data analysis is shared with the Media during Quarterly Press Conference addressed by President, SIAM and circulated to various Ministries of Government of India.

SIAM Executive Committee, in its meeting held in April 2025, directed the Group to explore a suitable mechanism for reporting vehicle registration data from the Vahan dashboard of the Ministry of Road Transport and Highways (MoRTH). In line with this directive, the Group has deliberated on aligning the Vahan data reporting format with SIAM's existing vehicle data reporting structure, while also considering key challenges such as the dynamic nature of registration data, unavailability of data for the state of Telangana, the need to filter out other types of vehicles, and the presence of data from a large number of lesser-known vehicle manufacturers, among others. Subsequently, SIAM has started reporting company wise registrations data starting from July 2025 for the month of June 2025, initially to only SIAM members. This reporting will be in addition to the regular monthly and quarterly wholesale data already being published by SIAM.

SIAM commenced reporting of Vehicle Registrations data from VAHAN dashboard in consultation with SIAM members.

SIAM Vehicle Classification Meeting in New Delhi

To further strengthen the accessibility and resourcefulness of SIAM data, SIAM has developed a comprehensive dashboard leveraging wholesale data submitted by member companies. This dashboard provides structured and searchable data from FY 2019–20 onwards and is accessible to SIAM members and subscribers of SIAM data.

While the core data reporting structure is well-established, the Group continues to engage periodically to incorporate new vehicle categories, fuel types, and other relevant updates, ensuring that the data reporting framework remains current, comprehensive, and aligned with evolving industry trends.

Press Briefing on Quarterly Motor Vehicle Data

Key Deliverables & Activities 2024-25

Deliverable:	Stakeholders:
Reporting of SIAM Monthly and Quarterly Production, Domestic Sales and Exports Data	Membership, Media, various Departments of Government of India, and Subscribers of SIAM Data
Key Activities/Measures:	
• Finalisation/ updation of vehicle categories • Collection of data from Members • Release of data to various stakeholders	
Deliverable:	**Stakeholders:**
Reporting of Vehicle Registrations data from Vahan Dashboard of Ministry of Road Transport & Highways (MoRTH)	Membership
Key Activities/Measures:	
• Alignment & finalization of reporting format of Vahan data with the current SIAM Vehicle data reporting structure. • Alignment & finalization of Vahan Vehicle Class and Fuel types with SIAM Vehicle Category and Fuel types. • Issues/ concerns with regards to current data reporting on the Vahan portal to be taken up with NIC	






SIAM
aligned with Seven Cs
for mobility solutions

SIAM
Bharat Mobility
SIAM
Bharat Mobility



2nd GREEN PLATE
EV Rally

Launch of SIAM-KVS






SIAM

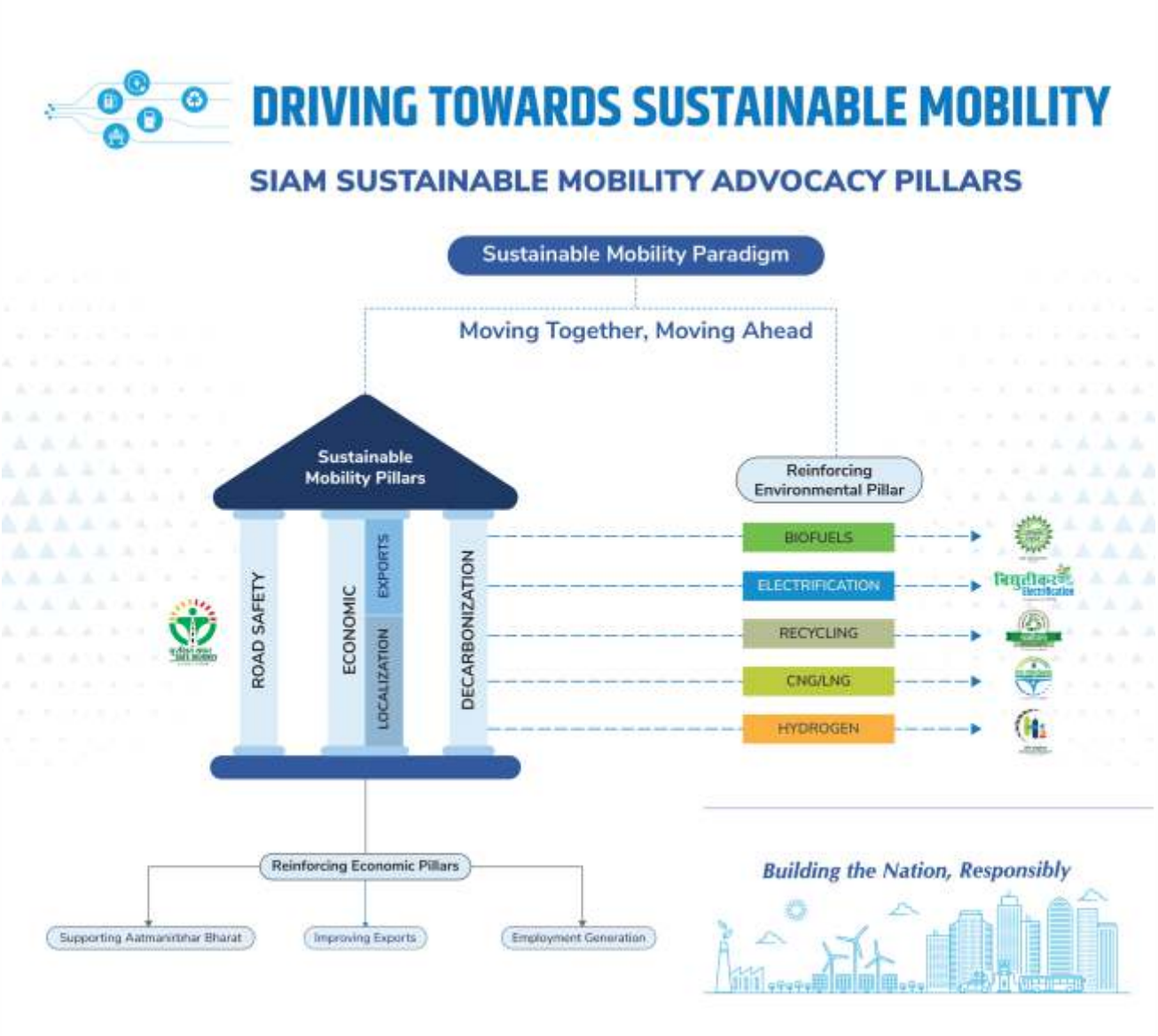
Society of Indian Automobile Manufacturers

TECHNICAL AFFAIRS

SUSTAINABLE MOBILITY - A ROAD TO FUTURE

Sustainable mobility refers to providing safe, efficient, and eco-friendly transportation for people and goods, aligning with the three pillars of sustainability - social, environmental, and economic. The concept aims to balance the needs of various stakeholders, including governments, industries, civil society, and individuals, while requiring collaboration across sectors like energy, health, education, environment, and urban planning.

SIAM under its Sustainable Mobility Paradigm works to promote three key pillars in the country - improvement in road safety, economic development through boost in localisation and exports in the automotive sector and decarbonisation through adoption of eco-friendly fuel alternatives.



SUSTAINABLE MOBILITY GROUP

The Sustainable Mobility Group serves as a strategic platform to guide and coordinate the Indian automobile industry's efforts toward green and low-carbon transport solutions. It works to align the sector with national and global sustainability goals such as decarbonization, Mission LiFE, and India's Net Zero 2070 target. The Group drives collaboration on clean fuels, renewable energy use, and circular economy practices, while helping members prepare for evolving regulatory frameworks. It also develops technology roadmaps and implementation strategies to mainstream sustainable mobility across the automotive value chain. Through regular meetings and stakeholder engagement, the Group advances innovation, supports policy advocacy, and ensures that the industry plays an active role in India's sustainable development agenda.

Successful Culmination of *'Sukh Da Saah'* Flagship Project

SIAM successfully implemented key projects under the Sukh Da Saah initiative, with the following reports published and shared with stakeholders:

- Sukh-Da-Saah 1.0 & 2.0
- Update & Microbial Digester Projects (4 reports)
- Update on Multimedia Campaign on SDS activities

The Group appreciated these initiatives as significant contributions to environmental sustainability and stubble-burning prevention under SIAM's CSR strategy.

International Cooperation Projects

In line with the vision to bring and adopt global best practices within the country, SIAM is collaborating with international agencies on the following three bilateral project proposals

- SIAM & UNEP-GEF Project: Phasing out of POPs and promotion of POPs-free alternatives in the Automotive Sector
- SIAM & OSP, KSA Project : Promoting efficient and cleaner ICE technologies
- SIAM & ITRI Taiwan Project: Carbonization Technology converting agro-waste into biochar and organic fertilizer
- SIAM also highlighted Japan's (METI) proposal for a joint initiative on Sustainable Fuels and Mobility.

Members at SIAM Sustainable Mobility Group meeting at Tata Motors Lake House, Pune

Sub-Group Reports

SIAM constituted two sub-group to prepare a comprehensive White Paper on diesel's relevance, utility, environmental impact, and future under evolving regulatory norms and environmental scrutiny - such as diesel vehicle bans in States like Himachal and Uttarakhand. The paper compares diesel with other fuels across emissions, efficiency, power drive and consumer benefits. The paper also explores real driving emissions, diesel's role in future transportation, and the implications of diesel-related emissions on sustainability targets.

SIAM formed sub-groups to assess diesel's future and evaluate WTW GHG emissions for informed, climate-aligned policy decisions.

SIAM constituted a sub-group to finalise a detailed assessment of WTW GHG emissions across full fuel lifecycles. Its objectives include evaluating the impact of various policy instruments, technological innovations, and alternative fuel pathways on WTW emissions, and contributing to climate-aligned decision-making in the automotive sector. Several meetings of the Sub-Group have had happened from 2023 till today to discuss the same.

SIAM Policy Advocacy on Sustainable Mobility Imperatives

Two key advocacy documents were presented by SIAM to support sustainable mobility and chemical safety in the automotive sector. In 'Declaration on Hazardous Materials' India's evolving framework for managing hazardous chemicals, including POPs, refrigerants, and heavy metals was outlined. It highlighted the roles of institutions like MoEF&CC and the Ministry of Chemicals & Petrochemicals, referencing policies such as the Draft Chemicals (Management and Safety) Rules, 2020 (India REACH). These consolidated earlier rules for

SIAM outlined hazardous chemical safety measures and a sustainable mobility roadmap promoting clean technologies, circularity, inclusivity, and efficiency.

hazardous chemical storage, import, and emergency preparedness.

In 'Comprehensive Roadmap for Sustainable Mobility' holistic sustainability agenda built on environmental, social, and economic pillars was set. Technologies like ZEVs, advanced engines, renewable energy integration, and emission controls was promoted, while encouraging circularity and decarbonization. Economically, it advocated for energy efficiency, affordable transport, and favourable taxation, along with innovation in manufacturing and lifecycle-based solutions.

Eco-design & Lightweighting, and Nature-based solutions

The group discussed efforts to integrate eco-design innovations in India's automobile industry, focusing on sustainable practices across the vehicle lifecycle. This includes using bio-based plastics, recycled metals, modular designs, and Life Cycle Assessments (LCA) to reduce environmental impact. Key initiatives involve recycling, lowering energy use through biomaterials like hemp and bamboo, and adopting renewable energy in manufacturing.

To support India's ESG, SDG 2030, and Decarbonisation-Panchamrit goals, SIAM is promoting lightweighting using materials like aluminium and carbon fibre composites for better performance, fuel efficiency, and regulatory compliance (e.g., CAFE, BS 6 norms). The group directed SIAM to form a Sub-Group to review these areas and develop an approach paper for industry-wide adoption.

Nature-positive Manufacturing & Best Practices

SIAM emphasized adoption of best practices in water conservation through closed loop recycling systems and rainwater harvesting, energy conservation by utilizing renewable sources like solar and wind and adopting energy-efficiency. The Group proposed forming a Sub-Group to prepare a roadmap for integrating nature-positive approaches into automotive manufacturing.

Climate Finance Taxonomy (CFT)

India's draft Climate Finance Taxonomy (CFT), developed by the Department of Economic Affairs (DEA), Ministry of Finance, aims to standardize definitions for climate-aligned investments supporting Net Zero 2070 and Viksit Bharat 2047 goals. It will guide public and private financial flows across mitigation, adaptation, and resilience sectors, aligning with the Paris Agreement and LT-LEDS. SIAM and ICAT have provided inputs on the framework. The taxonomy will support green bond issuance, ESG disclosures, and investment credibility, while harmonizing with international frameworks like the EU Taxonomy, tailored to India's development priorities.

India's draft CFT will standardize climate investment definitions; SIAM is advancing carbon and green credit opportunities for the auto sector.

SIAM Initiatives on Carbon Credits and Green Credits

SIAM is actively exploring industry engagement with India's Carbon Credit Trading Scheme (CCTS) and the Green Credit Programme (GCP) under the Mission LiFE. It is assessing how OEMs can leverage emission reduction efforts-like renewable energy use, energy efficiency, and supply chain decarbonization-for credit generation under voluntary and compliance carbon markets. For green credits, SIAM is examining alignment opportunities in end-of-life vehicle recycling, afforestation, and water conservation. It is also engaging with the Indian Council of Forestry Research and Education (ICFRE) to clarify sectoral roles and explore pilot initiatives under GCP.

Key Deliverables & Activities 2024-25

Deliverable:	Stakeholders:
To advance India's transition toward green and low-carbon transport	Membership / Government

Key Activities/Measures:

- Successful Culmination of 'Sukh Da Saah' Flagship Project
- Collaborations with international agencies
- Sub-Group Report on Diesel - White Paper
- Well-to-Wheel (WTW) GHG Emissions Assessment
- Strengthening of hazardous materials regulation
- Efforts to integrate eco-design innovation in the Indian automobile industry
- Suggestions and inputs towards finalization of framework guidelines on climate finance taxonomy (CFT)

ELECTRIC MOBILITY GROUP

SIAM Members at Electric Mobility Group Meeting, Mussoorie

The SIAM Electric Mobility Group aims to guide the automobile industry in expanding electric vehicle (EV) adoption by aligning its efforts with national and state EV policies and the government's broader e-mobility vision. The group works on developing recommendations to integrate EVs into manufacturers' portfolios, promoting inclusivity by encouraging participation from startups and new entrants. It collaborates with key stakeholders to shape technical regulations and standards related to vehicles, batteries, charging infrastructure, and components. The group also plays a proactive role in organizing and participating in events that promote electric mobility across India.

SIAM EV Skills Gap report highlights the skills and skilled employees required by 2030

In July 2024, SIAM released the EV Skill Gap Report, highlighting the emerging skill requirements in the automotive industry due to the transition from ICE to EV technology. The report identified key technical and operational skills, critical workforce needs, and actionable recommendations to bridge the gaps, preparing the sector for future demands. It aimed to align industry capabilities with the government's vision of a skilled EV workforce.

From July 2024 onwards, SIAM continued its विद्युतीकरण (Electrification) campaign across social media platforms, sharing educational content on the benefits of electric vehicles, policy updates, myth-busting facts, and other ecosystem developments. These posts formed part of a year-long campaign that effectively engaged the public and key stakeholders, encouraging greater EV adoption.

In August 2024, SIAM's sustained policy advocacy with the Ministry of Heavy Industries resulted in the extension of the Electric Mobility Promotion Scheme (EMPS) by two months. This ensured continuity of incentives for EV adoption, helping maintain market momentum during the policy transition period.

On 9 September 2024, SIAM organized the 2nd Green Plate EV Rally, following the success of its 2023 edition. The event featured 151 vehicles across 2W, 3W, 4W, and CV segments, aimed at raising public awareness of EV benefits. The rally was inaugurated by Honourable Union Minister Shri H. D. Kumaraswamy, Ministry of Heavy Industries, Government of India, and also included a myth-busting session at DTC Switch Delhi Rajghat Depot to address consumer queries about EV safety and performance.

Hon'ble Minister if Heavy Industries and Steel with Sr. Industry Leaders flagging of 2nd SIAM Green Plate EV Rally, Delhi

In October 2024, SIAM actively supported the launch of the PM E-DRIVE Scheme, a flagship initiative to boost EV manufacturing and adoption in India. The launch was marked by a vehicle rally, underscoring the scheme's focus on incentivizing domestic production and accelerating India's EV transition. That same month, SIAM successfully advocated for the inclusion of e-Trucks (N2 and N3 segments) in the PM E-DRIVE Scheme, securing an allocation of INR 500 crore to promote electrification in commercial vehicles. The PM E-DRIVE policy was officially notified immediately after EMPS concluded on 30 September 2024,

SIAM advocacy led to the inclusion of N2 and N3 Category e-trucks in PM EDRIVE policy

ensuring uninterrupted subsidy support for electric mobility.

In November 2024, SIAM's discussions with the Ministry of Heavy Industries led to the advancement of funds allocated for e-Three Wheelers under PM E-DRIVE from FY 2025-26 to the period of November 2024 - March 2026, accelerating adoption in this vital segment.

January 2025 marked the organization of the 4th Global Electrification Mobility Summit (GEMS) by SIAM at the Bharat Mobility Global Expo 2025. The summit brought together global industry leaders, policymakers, and stakeholders to share insights and strategies for advancing EV adoption. During the same event, SIAM showcased a dedicated Electrification Zone, highlighting the latest advancements in EVs, charging infrastructure, and renewable energy integration.

Sr Industry Leaders at CXOs Panel at Global Electrification Mobility Summit

In February 2025, SIAM participated in India Energy Week with a dedicated Decarbonization Pavilion. The pavilion demonstrated the role of electric mobility and renewable energy solutions in reducing carbon emissions and advancing India's sustainability targets.

Hon'ble Minister of Heavy Industries & Steel inaugurating SIAM Electrification Pavilion

In March 2025, SIAM showcased the Sustainable Mobility Pavilion at the Smart Mobility Expo, which focused on integrating smart technologies with electric mobility. This platform also encouraged discussions on urban mobility solutions, EV infrastructure, and connected technologies. During the same month, SIAM's recommendations were incorporated into the finalized guidelines for the Phased Manufacturing Programme (PMP) under PM E-DRIVE. The guidelines outlined localization timelines for critical components like Battery Management Systems (BMS) and vehicle control units in e-buses, while the PMP implementation timeline for electric two-wheelers was extended to 1 May 2025.

In May 2025, SIAM collaborated with SETU Aayog in Uttarakhand to deliberate on state-specific EV policy measures and infrastructure development plans. An EMG meeting held alongside addressed strategic initiatives to boost regional EV adoption.

Across these initiatives, SIAM maintained a consistent focus on policy advocacy, industry collaboration, and public outreach, reaffirming its commitment to driving sustainable, inclusive, and large-scale EV adoption in support of the vision for Viksit Bharat.

Key Deliverables & Activities 2024-25

Deliverable:	**Stakeholders:**
To Ensure Smooth Transition to Electric Mobility	Membership / Government

Key Activities/Measures:

- Launch of SIAM EV Skill Gap Report
- Vidyutikaran Social Media Campaign
- 2nd Green Plate EV Rally
- PM E-DRIVE Scheme Launch
- Inclusion of e-Trucks in PM E-DRIVE
- Advancement of e-3W Funds to prevent sudden drop in consumer demand
- EMPS Scheme Extension to maintain policy continuity
- 4th GEMS & Electrification Zone at Bharat Mobility Global Expo 2025
- Decarbonization Pavilion at India Energy Week
- Sustainable Mobility Pavilion at Smart Mobility Expo, 2025
- PMP Guidelines Finalization for PM EDRIVE
- State Interaction through group meeting

RECYCLING & MATERIALS GROUP

SIAM Recycling & Materials Group focuses on enabling a robust ecosystem for vehicle dismantling and recycling in the formal sector. It supports the development and implementation of scrappage policies and processes for handling End-of-Life Vehicles (ELVs), including their deregistration. A key mandate includes driving the industry's commitment to phasing out hazardous substances and resolving material-related issues through dialogue and policy support. The group also promotes awareness and participation through industry events on recycling and material sustainability.

During the year, the SIAM Recycling & Material Group contributed with its proactive role in advancing the circular economy and strengthening regulatory preparedness. Key deliberations included the agreement to organize a dedicated ELV workshop, the ongoing push for harmonized data templates, and collective preparation of submissions to MoEF&CC.

Urgent actions were identified on ELV EPR compliance, including addressing steel content declaration, portal readiness, and RC documentation gaps. Additional focus areas included battery labelling alignment, integration of BS-II vehicles in scrappage policy, and incentivizing ELV returns.

SIAM facilitated the finalization of key environmental regulations including the End-of-Life Vehicles Rules, 2025 (effective 1 April 2025) and the Amendment to Hazardous Waste Management Rules, 2025 (effective 1 April 2026). The latter introduces an Extended Producer Responsibility (EPR) framework for non-ferrous metal scrap including aluminium, copper, zinc, and their alloys to enhance material recovery, reduce virgin extraction, and promote circularity in the metal sector.

Additionally, the group is tasked with developing comprehensive guidelines for circularity in the automotive sector, focusing on key areas such as recycling, waste reduction, remanufacturing, and sustainable production. The framework is to be built on foundational principles like the 3Rs (Reduce, Reuse, Recycle), sustainability, inclusivity, and transparency. The group will also define eco-design practices, and establish monitoring mechanisms to evaluate progress, while ensuring periodic updates to maintain relevance and effectiveness.

SIAM advanced ELV and circular economy rules, refined EPR targets, and pushed harmonized recycling, labelling, and compliance guidelines.

During the 2024-2025 period, SIAM actively engaged in consultations with MoEF&CC to refine the Extended Producer Responsibility (EPR) regime for End-of-Life Vehicles (ELVs). These discussions, held under the chairmanship of the Ministry's Joint Secretary, led to key regulatory revisions aimed at improving feasibility for the automobile industry. Based on SIAM's inputs, the mandate for increased use of recycled steel in new vehicles was removed, and the originally proposed 3% annual cumulative increase in EPR targets was also withdrawn. The EPR trajectory was revised to a more achievable 8%, 13%, and 15%, replacing the earlier 10%, 20%, and 30% progression.

Additionally, the final notification broadened the definition of eligible materials for generating EPR certificates, allowing inclusion of various steel scraps generated during vehicle manufacturing, thereby enhancing flexibility for compliance and encouraging robust recycling practices across the industry.

Discussions on 'Framework Guidelines for Circular Economy'

Based on the deliberations and suggestion of the members of the Sub-group; a Framework Guidelines for Circular Economy has been formulated.

Discussions with MoEF&CC on EPR for End-of-Life Vehicles

Between July 2023 and May 2024, SIAM participated in a series of stakeholder consultations to address concerns in the draft Environment Protection (End-of-Life Vehicles) Rules, 2024, which were officially notified in January 2025. These rules place end-of-life recycling responsibility on vehicle manufacturers, supporting circular economy goals. During 2024-2025, SIAM also held discussions with senior MoEF&CC officials to resolve key implementation challenges, particularly around Extended Producer Responsibility (EPR) and labelling under the Battery Waste Management Rules, 2022. Additionally, SIAM successfully advocated for the exclusion of the automobile sector from the scope of the Non-Ferrous Metals Rules, 2025.

Discussions with CPCB Officials on EPR Regime for various waste streams

Stakeholder meetings involving CPCB, SIAM, and leading OEMs were held to resolve implementation challenges under the Environment Protection (End-of-Life Vehicles) Rules, 2025. Key discussions addressed producer responsibilities, EPR registration, and the role of the MoEF&CC Implementation Committee. CPCB shared key objectives and proposed redressal mechanisms, with implementation guidelines underway. A follow-up meeting on battery waste focused on standardizing metal content percentages across battery types on the centralized EPR portal and emphasized the need for clear implementation guidelines.

Senior Industry Experts at consultative meeting with Ministry of Environment, Forests and Climate Change

Key Deliverables & Activities 2024-25

Deliverable:	**Stakeholders:**
To enable adoption of material circularity practices in automotive industry	Membership / Government
Key Activities/Measures:	

• Facilitated finalization of the following rules:
  ○ Environment Protection (End-of-Life Vehicles) Rules, 2025
  ○ Hazardous and Other Wastes (Management and Transboundary Movement) Amendment Rules, 2025
• Formulation of Framework Guidelines for Circular Economy
• Recommendations to MOEF&CC to rationalize & make the ELV EPR Rules Implementable and print EPR registration number by a barcode or Quick Response code as well as in product information brochure
• Recommendations on EPR pricing related to Used-Oil EPR framework	

GAS BASED MOBILITY GROUP

The SIAM Gas Based Mobility Group focuses on the techno-commercial promotion of gas-based mobility in India. It serves as a key interface with MoPNG, State Governments, PNGRB and gas companies to support policy advocacy, infrastructure development, and vehicle adoption. The group updates SIAM members on market and policy developments, explores central and state-level incentives, and supports the launch of new CNG/LNG vehicle models. It also drives stakeholder engagement through roadshows and studies to strengthen the case for natural gas as a sustainable mobility option.

India, with its youthful population and rapid economic growth, is set to drive very high energy demand. Oil and gas will be central to meeting this demand, with consumption expected to increase significantly. Natural gas, in particular is poised to play a transformative role in our demand for high energy. This aligns with the Government's vision to increase the share of Gas in the energy mix from ~6% to 15% by 2030.

Gas-based mobility is emerging as a key driver of energy demand, with City Gas Distribution (CGD) and CNG playing a central role in its growth. CNG accelerates Compressed Biogas (CBG) development. CBG, a carbon-negative biofuel, offers environmental benefits alongside economic growth for rural India and energy security. Simultaneously, the expansion of LNG infrastructure, including regasification terminals and floating LNG facilities, coupled with advancements in vehicle technology, would position LNG as an important fuel for long-haul transport.

In this context, SIAM's Gas-Based Mobility Group remains actively engaged with all stakeholders (Central Govt., State Govt., Industry, Gas Companies, etc.) across the ecosystem to promote and accelerate the adoption of gas-based mobility, contributing meaningfully to the decarbonization of India's transport sector.

The year 2024-25 has seen remarkable progress in gas-based mobility eco system, with several positives.

Positive developments in the gas-based mobility ecosystem:

1. **Rapid expansion in CNG Infrastructure:** Since 2015, the number of CNG stations has increased eightfold. In FY 2024-25 alone, over 1,200 stations were added, reaching a total of 8,067. The momentum continues to achieve the target of 17,500 stations by 2030.

2. **Supportive gas pricing policy:** Earlier this year, APM gas allocation to CGD was adjusted in response to evolving supply dynamics from legacy production fields, leading to CNG price hikes. The Government revised the domestic gas policy, allowing advance allocation of additional New Well gas on a prorated basis. This not only halted abrupt price increases but also ensured long-term clarity and stability in pricing and domestic availability.

3. **Reduction in VAT on CNG by State Governments:** In the last one year, major states such as Andhra Pradesh, Rajasthan, Bihar, and Assam have reduced VAT on CNG from an average of 18% to 8%, promoting gas-based mobility.

4. **OEMs' increased focus on Natural Gas Vehicles:** The world's first CNG-based motorcycle has been launched. In CNG cars, premium features like automatic transmission, sunroof, connected car technologies, and increased luggage space are now available. Significant investments have been made in localizing vehicle components and R&D to offer more advanced and fuel-efficient CNG vehicles. 3Ws and LCVs continue to see active development, with manufacturers consistently developing and launching new gas-powered models.

   Many OEMs and component manufacturers displayed clean gas-based vehicle and component technologies this year during

exhibitions at the Bharat Mobility Global Expo and the India Energy Week 2025.

5. **Strong growth CNG vehicle Uptake:** FY 2024-25 witnessed strong sales of gas-based vehicles. After crossing the 1 million mark for the first time in FY 2023-24, sales surged to over 1.2 million in FY 2024-25-an increase of 24% year-on-year and 157% over the past three years.

To further catalyze stakeholder alignment, SIAM, in partnership with the Petroleum and Natural Gas Regulatory Board (PNGRB), organized a conference on Gas-Based Mobility, **"Gas se Gati, Bharat ki Pragati"** on 28th July 2025 at India Habitat Centre, New Delhi. This conference brought together several senior policymakers across ministries, CGD entities, automotive OEMs, LNG fleet operators, and academia.

The workshop marked a step forward in strengthening India's gas mobility ecosystem. It showcased the collective commitment of the government, academia, and industry stakeholders towards building a sustainable, low-emission, and self-reliant transportation future.

Eminent Leaders and Experts from Auto Industry, OMC and Govt

Mr P K Banerjee, ED, SIAM; Mr Sujit Bajpayee, Member CAQM; Dr Hanif Qureshi, Addl. Secretary, MHI; Mr Sudeep Jain, Addl. Secretary, MNRE; Dr Anil Jain, Chairman, PNGRB; Mr Rahul Bharti, Sr. ED, Maruti Suzuki India; Mr D Balakrishnan; VP, Ashok Leyland

Key Deliverables & Activities 2024-25

Deliverable:	**Stakeholders:**
Industry Coordination on Gas-Based Mobility	Membership / Government / Society
Key Activities/Measures:	
Facilitated stakeholder discussions on infrastructure, technology, and facilitated policies to support the adoption of gas-based mobility solutions.	
Deliverable:	**Stakeholders:**
Strategic Engagement through PNGRB-SIAM Workshop	Membership / Government / Society
Key Activities/Measures:	
Organised workshop in partnership with PNGRB to engage key stakeholders and discuss the roadmap for scaling gas-based transportation in India.	

EMISSIONS AND CONSERVATION GROUP

SIAM Emission and Conservation (E&C) group addresses all regulatory issues related to emissions, fuel efficiency, fuel quality, and in-use testing. It prepares industry roadmaps for future emissions regulations and represents the sector in discussions with Central and State Governments, testing agencies, and global bodies like WP.29. The Group continuously monitors and responds to domestic and international regulatory developments impacting emissions and sustainability.

The SIAM Group played a pivotal role in advancing the automotive industry's sustainability agenda during the fiscal year 2024-25. With an unwavering commitment to the priorities and alignment with the strategic interests of OEMs, the Group has led several key initiatives centred around sustainable mobility.

Proposed Fuel Economy Norms

FY 2024-25 marked a significant phase in India's journey toward sustainable mobility, with the automotive industry making considerable strides in advancing fuel economy and emission standards. SIAM actively engaged with the policymakers and technical bodies to shape a future-ready and balanced regulatory framework. Following are the key developments.

- **CAFÉ III for M1 Category Vehicles**

  SIAM unified industry position on CAFÉ III Norms

  Formulation of CAFÉ III norms for passenger vehicles was one major focus area, where SIAM facilitated industry-wide consultations and submitted a unified position to the Ministry of Power and BEE on 24th December 2024. Emphasizing a holistic approach, SIAM advocated for treating CAFÉ III as a complete package, rather than evaluating parameters in isolation. This was crucial to ensuring coherence in policy outcomes and aligning industry objectives with national sustainability goals. Subsequently, SIAM held multiple interactions with Secretary, Ministry of Power; Secretary, Ministry of Road Transport and Highways; and Additional Secretary, Ministry of Heavy industries and discussed industry recommendations for CAFÉ III.

- **CSFC Norms for Medium and Heavy-Duty Vehicles**

  SIAM actively collaborated with the Bureau of Energy Efficiency (BEE) on the second phase of fuel consumption standards (CSFC) for Medium and Heavy-Duty Vehicles (M2, M3, N2, N3), participating in multiple stakeholder consultations, pertaining to stringent phase-2 emission norms.

  SIAM collaborated with BEE on the second stage of CAFC norms and advocated for the phased implementation of the Bharat Vecto Simulation Tool.

  In response to BEE's proposal to tighten fuel economy norms by 30% over baseline values, SIAM advocated for a phased implementation, emphasizing the adoption of the Bharat VECTO Simulation Tool. The tool, currently under development, through a multi-stakeholder effort with strong support from SIAM, is designed to enable realistic and verifiable efficiency assessments based on Indian duty cycles.

  A key milestone was the official launch of Bharat VECTO by Hon'ble Union Minister Shri Nitin Gadkari at the SIAM's Sustainable Mobility Pavilion during Bharat Mobility Global Expo in January 2025. SIAM takes pride in having contributed significantly to this initiative, which is poised to bring greater transparency and technical robustness to India's fuel economy evaluations.

- **CAFÉ Norms for N1 Category Vehicles**

  SIAM sought N1 vehicle exemption from CAFÉ norms to protect small businesses.

  Currently, N1 vehicles are not covered under the ambit of CAFÉ. BEE has proposed introducing CAFÉ targets for the N1 category, with a 22% reduction from the current target on the MIDC cycle. To align with the WLTP cycle, BEE has additionally proposed applying a 16% conversion factor from MIDC to WLTP. Internal discussions

SIAM Members at SCOE Meeting, at Ashok Leyland, Chennai

SIAM Members at SCOE Meeting, at Mumbai

among SIAM stakeholders are currently in progress.

SIAM Contribution in Shaping Next Stage Emission Norms

SIAM actively engaged in the technical work under the AIS 175 (WLTP) Subgroup, collaborating with ARAI and other stakeholders to refine the upcoming WLTP-based standards set to be enforced from April, 2027. SIAM played a key role in identifying and resolving implementation challenges, particularly for M1 & N1 category, by building consensus across the industry.

SIAM collaborated on WLTP, addressed BS-7 challenges, supported phased rollout, and aligned with evolving global emission standards

The discussions on transition to next stage of Emission norms, i.e. BS7 have also started. Currently, there is uncertainty in the European regulatory landscape. Euro 7 norms have been notified recently & would be applicable from Nov 2026. The Tyre Wear and Brake wear which is part of Euro 7 is yet to be finalised & would be implemented later.

ARAI along with SIAM has set up Technical Panels (Brake wear, Tyre wear, Coast down, RDE, and ISC/Type-1/Evaporative Emissions) across vehicle segments. Initial meetings have been held for a few a segment. As key elements of Euro 7 are still under deliberation, SIAM view is that BS7 implementation timelines should be evaluated and decided carefully. ARAI has been tasked with tracking Euro 7 developments to guide India's implementation strategy.

This issue as also discussed in the SCOE Meetings in Nov 24 & June 25. SIAM proposed that a comprehensive Source Apportionment Study should be done to guide in this decision making. Chairman of Standing Committee on Emission (Additional Secretary, MoRTH) agreed and also suggested that a phase-wise implementation of BS-7 emission norms could be considered.

The Ministry of Road Transport and Highways (MoRTH), through a Draft Notification, has communicated the implementation of the WLTP test cycle for vehicles in categories M2 and N1 (GVW not exceeding 3500kg), as well as all M1 category vehicles manufactured on or after 1st April 2027. SIAM has submitted its initial inputs to MoRTH for consideration.

Engagement on Clean Mobility Policies

Throughout the year, SIAM actively engaged with policymakers to shape evolving regulatory frameworks aimed at reducing vehicular emissions and promoting clean mobility, particularly in regions facing significant air quality challenges. In Delhi-NCR, SIAM participated in consultations with the Commission for Air Quality Management (CAQM) on proposed Zero Emission Vehicle (ZEV) roadmaps and potential mandates.

SIAM promoted clean mobility via collaborative policy dialogues, supporting flexible, tech-neutral approaches for regional emission reduction goals.

SIAM advocated for a collaborative and technology-neutral approach, emphasizing that sustainable mobility goals should allow diverse clean technologies rather than enforcing mandates for specific solutions. This position aligns with national initiatives, such as the National Bio-Energy Programme, the National Biofuel Policy, and the Green Hydrogen Mission - reinforcing the need for innovation and flexibility in India's sustainable mobility journey.

Similarly, SIAM contributed to discussions in Maharashtra on potential measures to phase out older petrol and diesel vehicles in the Mumbai Metropolitan Region (MMR). SIAM provided strategic inputs to ensure that any transition plan strikes a balance between environmental goals and the operational realities of the industry, while considering consumer affordability.

Through these proactive engagements, SIAM reaffirmed its position as a trusted industry voice, committed to advancing sustainable mobility while safeguarding economic and social interests.

Collaboration with JAMA and Exploration of Emerging Technologies

SIAM-JAMA meet fostered collaboration, exploring emerging automotive technologies and industry innovation.

Collaborations remained a recurring theme for SIAM's Emission & Conservation Group (E&C) Group, with a productive SIAM JAMA meeting held at Lonavala from 21st - 23rd October 2024. This provided a platform for both the organizations to explore emerging technologies in the automotive field & share Regulatory information. This collaborative spirit highlights SIAM's dedication to staying at the forefront of industry advancements.

Auto Industry experts of India and Japan at SIAM JAMA Emissions Meeting

Sustainable Fuels & Emission Reduction Efforts

The Emission & Conservation Group continued to play a crucial role in enabling the transition toward cleaner fuels and a lower-carbon future. Reflecting SIAM's commitment to national sustainability goals, the group's work extended beyond internal deliberations, emphasizing cross-sectoral collaboration and knowledge exchange.

SIAM was actively engaged in several Inter-Ministerial Committee (IMC) Meetings convened by the Ministry of Petroleum & Natural Gas (MoP&NG), SIAM submitted its inputs for the IMC reports on various aspects, such as enablers for promoting flex-fuel vehicle (FFV) technology, biogenic carbon assessment, ethanol demand estimation, and readiness of the automotive sector for higher fuel blends, etc. SIAM's responses balanced Government's ambitious targets with industry feasibility and long-term sustainability.

After successfully achieving 20% Ethanol Blending Target in Gasoline, Government of India is now exploring the possibility of blending higher percentage of ethanol (E22, E25, E27 & E30) in gasoline for which multiple rounds of meetings was held in a BIS sub-committee, represented by SIAM, CSIR-IIP, FIPI and MoP&NG.

SIAM has requested Government of India for developing a clear roadmap on ethanol blending programme, considering the interest of all concerned stakeholders. SIAM has been engaging with relevant authorities to contribute technical insights on this front.

MoRTH has requested BIS through Ministry of Consumer, Food & Public Distribution to initiate work on preparing standards for higher ethanol blends. To take this initiative forward, a study to assess the impact of E30 blended fuel on existing E10 & E20 vehicles will be carried out where SIAM members will be expected to play a pivotal role in performing various tests on their vehicles.

In line with national efforts to decarbonize transport, the Government of India directed the Automotive and Oil & Gas sector to explore the feasibility of blending Iso-Butanol (IBA) with Diesel. Under this initiative, SIAM worked extensively to develop a robust test matrix, which has been submitted to ARAI for further evaluation and proposal submission to MoRTH. Given the limitations of ethanol blending in diesel, IBA is being explored as a promising alternative. SIAM's active participation reflects the industry's dedication to responsibly exploring new energy pathways in support of national objectives.

SIAM participated in India Energy Week (IEW) 2025, held from 11 to 14 February 2025 at the Yashobhoomi Convention & Expo Centre in Dwarka, New Delhi. The event was organized under the patronage of the Ministry of Petroleum & Natural Gas, Government of India, and jointly hosted by the Federation of Indian Petroleum Industry (FIPI). The SIAM Sustainable Mobility Pavilion was inaugurated by Shri Hardeep Singh Puri, Hon'ble Union Minister for Petroleum & Natural Gas, Various auto OEMs participated in IEW 2025, with the SIAM Pavilion showcasing 15 vehicles - including 8 two-wheelers, 1 three-wheeler, and 6 passenger vehicles - highlighting the industry's advancements in clean and sustainable mobility solutions."

On 11th August 2025, SIAM organised the 4th International Conference on World Biofuel Day, themed 'Indian Auto Industry's Contribution Towards a Biofuel Economy.' The event promoted

biofuels and brought together key stakeholders, graced by Mr. Sanjeev Chopra, Secretary, Department of Food and Public Distribution, and H.E. Mr. Kenneth Nobrega, Ambassador of Brazil.

These initiatives highlight SIAM's proactive role in advancing cleaner fuels and technologies, supporting national decarbonization objectives while fostering innovation, collaboration, and industry preparedness.

Key Deliverables & Activities 2024-25

Deliverable:	**Stakeholders:**
Fuel Economy and Emission Norms	Membership / Government / Society
Key Activities/Measures:	
• Led industry consultations on CAFÉ III for PVs & presented unified view to Ministry of Power. Recommended complete-package approach for CAFÉ III policy design. Discussion Ongoing. • Engaged with BEE on CSFC Phase II for MDVs and HDVs. Advocated phased adoption via Bharat VECTO simulation tool. Discussion ongoing • Bharat VECTO project launched by Hon'ble Minister Shri Nitin Gadkari in Jan 2025 during Bharat Mobility Global Expo • Discussions on CAFÉ for N1 category vehicles from CAFÉ. SIAM submitted its proposal to BEE with next technical committee meeting to be planned soon • Discussions with ARAI on Bharat VECTO Project • SIAM actively participated in SCOE and AISC meetings, engaging with test agencies to deliberate on key regulatory matters. • Continued work under AIS 175 (WLTP) subgroup with ARAI for 2027 implementation. SIAM Submitted response to Ministry of Road Transport and highways on Draft GSR 270 (E).	
Deliverable:	**Stakeholders:**
Clean Mobility Policy Engagements	Membership / Government / Society
Key Activities/Measures:	
• Participated in CAQM discussions on ZEV roadmap for Delhi-NCR. SIAM submitted its response to MoEF&CC. Advocated for technology-neutral, collaborative approach aligned with national clean energy missions. • Engaged with Maharashtra authorities on Petrol and Diesel vehicle phase-out in Mumbai Metropolitan region (MMR) , highlighting industry and consumer considerations for a balanced transition. Discussion ongoing.	
Deliverable:	**Stakeholders:**
Promotion of Low-Carbon Fuels and Decarbonization Initiatives	Membership / Government / Society
Key Activities/Measures:	
• Organized the SIAM Conference on World Biofuel Day 2024, highlighting the automotive industry's role in advancing biofuels and supporting India's carbon neutrality goals. • Organized the 3rd International Symposium for Thriving Eco Energy in Mobility (ISTEM) at Bharat Mobility Expo 2025, focusing on advancing biofuels, hydrogen, and gas-based mobility solutions. • SIAM participated in Iso-Butanol (IBA)-diesel blending project through test matrix development, in coordination with ARAI and MoRTH. Detailed proposal to be shared with MoRTH by ARAI • Participated in BIS-led discussions on higher ethanol blends in motor gasoline. • Shared industry inputs on ethanol roadmap beyond 2025 to MoP&NG. • SIAM submitted comprehensive industry-wide consolidated inputs on the draft notification GSR 431(E) to MoRTH. • SIAM is currently discussing the scope of the Source Apportionment study with ARAI.	

AFTERMARKET PARTS GROUP

Member at SIAM Aftermarket Parts Group Meeting

This group promotes the use of genuine spare parts to improve road safety and vehicle performance. It works on regulatory challenges, EPR compliance, quality control, and recycling in the aftermarket space. The group leads outreach campaigns against counterfeits, facilitates benchmarking among OEMs, and prepares for technological shifts affecting the parts business

The Indian automotive industry is grappling with the growing challenge of counterfeit and non-genuine parts, which undermine safety, compromise performance, and damage brand reputation. With India's growing focus on Quality, Atmanirbharta, and Digitalization, tackling the rising counterfeit market is a key priority. SIAM's Aftermarket Parts Group, with industry support, is actively driving strategies through technological solutions like blockchain, legal measures, consumer awareness, supply chain management, and stakeholder collaboration. These efforts are vital to ensure safety, uphold quality standards, and protect brand integrity. The Group's "Be Genuine, Buy Genuine" campaign, under SIAM's Road Safety and Decarbonization pillars, promotes awareness against counterfeiting and encourages responsible consumer choices.

Key Deliverables & Activities 2024-25

Deliverable:	**Stakeholders:**
To promote use of genuine auto parts	Membership / Government
Key Activities/Measures:	
• Supporting 'Made in India' campaign within horizon of government policies • Augmentation by positioning of genuine parts during and after end of product life cycle at the best price within reach of every individual customer • Continuous engagements on Lead OEM aftermarket business expansion	

CMVR & SAFETY REGULATIONS GROUP

Additional Secretary, MoRTH; other Senior Govt Officials and Industry Experts at CMVR TSC Meeting at Ashok Leyland, Chennai

SIAM Group's Regulatory Engagement and Safety Initiatives

Over the past year, the SIAM Group has actively engaged with key stakeholders including member companies, industry associations such as ACMA and ATMA, and government bodies including MoRTH, MoCA, testing agencies, and BIS to promote safer mobility across India. These efforts have focused on supporting the adoption of internationally harmonized safety regulations while addressing India's unique requirements.

Strategic Dialogues and Standards Development

Discussions throughout the year centered on upcoming safety norms, the formulation of new standards, and the integration of emerging technologies in the automotive sector. SIAM maintained consistent dialogue with testing agencies, BIS, and MoRTH through platforms such as AISC, BIS Committees, and CMVR-TSC, resulting in the publication of new standards/revisions and amendments to existing standards.

Recognizing the rapid evolution of the automotive landscape, SIAM intensified efforts to shape a forward-looking Regulatory Roadmap. A series of focused meetings with member companies fostered alignment and encouraged industry-wide collaboration. Formal submissions were made to MoRTH requesting timely notification of proposed regulations.

These engagements contributed to the finalization and notification of several safety-related regulations, some of which are highlighted below:

Public Transport and Bus Safety

In the domain of public transport and passenger safety, SIAM played an active role in advancing key regulatory discussions. Notable topics included the Ambulance Code, Chassis Design for Bus Construction, and the mandatory provision of luggage space in buses. To promote inclusivity, SIAM also contributed to deliberations aimed at improving accessibility in Type 1 buses for individuals with reduced mobility. Furthermore, in a significant move to bolster safety in the rapidly expanding electric mobility segment, the Government mandated the installation of fire alarm systems in electric buses, reinforcing its commitment to passenger protection.

SIAM advanced safety, sustainability, and compliance through stakeholder collaboration, finalizing key CV, PV, fuel, and emerging regulatory measures.

Commercial Vehicle and Special Application Safety

To reinforce safety and regulatory compliance in commercial and special-purpose vehicles, SIAM actively participated in discussions covering a range of critical topics. These included Truck Cabin Ventilation, the introduction of AIS-214 (CMVR Type Approval for Troop Carriers), and the design standards for special-purpose vehicles built on truck chassis. Further safety advancements focused on driver-centric technologies, such as regulations to improve driver visibility, Advanced Driver Assistance Systems (ADAS), and Driver Drowsiness Detection (DDAW), aimed at reducing accidents and enhancing operational safety.

Fuel and Retrofitment Standards

Significant progress was made toward promoting cleaner and lower-emission vehicles through advancements in alternative fuels and retro fitment technologies. Key discussions focused on Retrofitting BS-IV ICE vehicles for hydrogen fuel usage, Installing Emission Control Devices (RECD) in heavy-duty vehicles exceeding 3.5 tonnes GVW, and Equipping BS-VI vehicles (above 3.5 tonnes

GVW) with CNG/LNG kits. Additionally, advanced regulations were introduced for Retro-Reflective Tape Markings, aimed at enhancing vehicle visibility and improving overall road safety.

Passenger Vehicle Regulations

Throughout the year, several critical safety and environmental measures were deliberated for the passenger vehicle segment. These included advanced crash safety norms such as Full Frontal and Rear Impact tests (including adaptations for gaseous fuel to reflect India-specific vehicle profiles), Revised Offset Frontal and Lateral Collision Standards, and Whiplash Injury Protection along with updated Luggage Displacement Safety Requirements for seats in M1 category vehicles, ensuring enhanced occupant protection. In addition, regulations were discussed for Advanced Driver Assistance Systems (ADAS), including Autonomous Emergency Braking, Emergency Lane Keep Assistance, and Event Data Recorders for post-crash analysis. Environmental performance standards were also a key focus, covering, Rolling Resistance, Wet Grip, and Rolling Sound, all aimed at improving fuel efficiency and reducing noise pollution.

Helmet & ABS Mandate Proposals for Two-Wheelers

MoRTH has further strengthened safety requirements for two-wheeler riders by issuing a draft notification mandating the provision of helmets for both rider and pillion at the time of vehicle sale. Additionally, a proposal has been shared to mandate ABS for two-wheelers below 125 cc (currently, advanced braking systems either ABS or CBS are mandated). SIAM highlighted that international experience indicates that ABS may not be universally effective for two-wheeler braking, with optimal performance largely on low-friction surfaces. In view of India's unique riding patterns, particularly the limited use of front brakes, SIAM recommends a re-evaluation of the proposed ABS mandate for two-wheelers below 125 cc and suggests deferring its implementation pending further deliberations.

Technology and Visual Identity

Regulatory efforts continued to advance automotive cybersecurity, with the formulation of CSMS/SUMS regulations, supported by internationally benchmarked interpretation documents. These initiatives aim to strengthen vehicle cyber resilience and ensure alignment with global standards. Additionally, discussions are underway for inclusion of L - category under the ambit of cyber security based on GRVA deliberations. Also concern highlighted on formulation of specification of Olive-Green colour for designated vehicle categories, contributing to clearer visual identification and regulatory compliance.

VAHAN Portal and Recall Management Enhancements

To address challenges related to the VAHAN portal, SIAM facilitated the formation of a dedicated subgroup under the SIAM CMVR Safety Group. This subgroup was tasked with addressing concerns raised by SIAM members and focusing on regulatory and policy-related aspects impacting portal functionality and compliance.

Recall Portal Expansion

In response to directives from MoRTH to broaden the scope of defect items listed on the VAHAN portal-aimed at offering greater transparency and choice to vehicle users, especially in light of new technologies, powertrain introductions, and retro fitment-related issues-SIAM CMVR & Safety Group established a specialized subgroup in collaboration with the SIAM Service Heads Forum, to make

suitable representation to ICAT subgroup on the subject. Ongoing deliberations are focused on resolving these concerns and ensuring the portal evolves to meet emerging industry needs.

Emerging Focus Areas in Road Safety and Regulation

Beyond the finalized regulations, several new areas of focus emerged during the year, reflecting the evolving priorities in road safety and regulatory governance. Key topics included Measures to control continuous honking, as part of broader efforts to mitigate noise pollution. Regulation of truck driver working hours, aimed at improving driver welfare and enhancing road safety. Introduction of on-board weighment devices, to strengthen compliance with load regulations and promote operational transparency. These collective initiatives underscore the CMVR Group's commitment to fostering a collaborative, forward-looking regulatory environment that supports industry growth while prioritizing safety, sustainability, and compliance.

Key Deliverables & Activities 2024-25

Deliverable:	**Stakeholders:**
Strengthening Regulatory Frameworks	Membership / Government / Society
Key Activities/Measures:	
• Enabled finalization of key safety regulations across vehicle categories. • Supported development of retrofitment norms for cleaner fuels like hydrogen and CNG/LNG. • Advanced readiness for ADAS, accessibility features in buses, and anti-fraud measures like odometer tampering norms.	
Deliverable:	**Stakeholders:**
Stakeholder Engagement & Coordination	Membership / Government / Society
Key Activities/Measures:	
• Strengthened collaboration with MoRTH, BIS, and test agencies through CMVR-TSC and AISC. • Facilitated VAHAN subgroup formation to address industry concerns and policy integration.	
Deliverable:	**Stakeholders:**
Future-Focused Safety & Compliance Areas	Membership / Government / Society
Key Activities/Measures:	
• Focus on emerging areas such as honking regulation, driver work hours, and on-board weighment systems.	

INTERNATIONAL HARMONIZATION GROUP

The group focuses on aligning India's automotive regulations with global standards, particularly those under UNECE WP.29. It monitors developments under the 1958 and 1998 agreements, formulates SIAM's positions, and supports bilateral cooperation on regulation, technology transfer, and trade. The group also promotes strategic engagement with global associations like OICA and IMMA.

The International Harmonization Group (IHG) of SIAM continues to play a pivotal role in aligning India's automotive regulatory framework with global standards. By consolidating positions across member companies, the group ensures that Indian automotive sector's voice is effectively represented in international forums.

SIAM's International Harmonization Group strengthened India's global automotive integration through active engagement in regulatory alignment, trade discussions, SDV standards, and regional cooperation.

Over the past year, SIAM and its members have actively participated in key global platforms, including the World Forum for Harmonization of Vehicle Regulations (WP.29), OICA Technical Committee, IMMA, UN ECE GR groups, and discussions surrounding the EU Free Trade Agreement (FTA). These engagements reflect the industry's commitment to global integration, knowledge sharing, and adoption of best practices.

The IHG group engaged various industry experts on discussions on emerging issues such as emissions, vehicle safety, decarbonization, Software Defined Vehicles (SDVs), and the evolving landscape of international trade regulations. A major focus was on the rising prominence of SDVs, where members discussed international developments related to feature integration, cybersecurity frameworks, and regulatory alignment to ensure safety and compatibility.

The IHG, with support from ARAI, is also advancing virtual homologation, aiming to transition from physical testing to virtual simulation and establish a global benchmark. SIAM highlighted the need to carefully study how other markets, especially the European Union (EU), are handling this shift, so that India's approach is strong, practical, and well-informed.

At the same time, SIAM played an active role in shaping BNCAP 2.0, working to improve focus on Road Safety aspects and benchmarking with various NCAP programmes across the Globe. It continued efforts to help develop a long-term regulatory roadmap for the Indian automotive sector. International Harmonization group is working on strengthening ties with key export markets. SIAM also deepened cooperation with neighbouring countries like Sri Lanka and Nepal, focusing on aligning standards and sharing technical knowledge to support regional progress.

Two meetings of the SIAM International Harmonization Group (IHG) were held in 2025 - a hybrid meeting on 7th January 2025 at RNTBCI, Chennai, and an in-person meeting on 2nd May 2025 at Hotel Ramada, Mussoorie, Uttarakhand - both chaired by Mr. Anil Kumar C., Senior General Manager, Tata Motors, and Mr. N. Balasubramanian, Vice President, Renault Nissan Tech.

SIAM has also been active in discussions within the Global South Alliance, where it strongly supported the idea that vehicle tests done in India should be accepted in other countries. Indian testing methods and safety standards have advanced significantly, and SIAM continues to push for global recognition of India's capabilities - especially in countries where vehicle regulations are still developing.

SIAM's IHG future plan includes formulating recommendations for the WP.29 1958 Agreement and developing a harmonized regulation roadmap. These initiatives underscore SIAM's continued commitment to positioning India as a well-connected and respected participant in the global automotive arena, underpinned by robust and future-ready standards.

Senior Industry Experts at SIAM International Harmonization Group Meeting, Mussoorie

Key Deliverables & Activities 2024-25

Deliverable:	**Stakeholders:**
Promote technical regulations and harmonize them based on India position	Membership / Government / Society

Key Activities/Measures:

- SIAM and its members engaged in key global forums like WP.29, OICA, IMMA, and EU FTA discussions.
- SIAM actively contributed to the development of BNCAP 2.0 and engaged in discussions on Virtual Homologation and other upcoming regulatory initiatives relevant to the Indian automotive industry.
- Engaged with the Global South Alliance and neighboring countries like Sri Lanka and Nepal to align standards and share technical expertise.

TWO WHEELER GROUP

Dedicated to two-wheeler industry concerns, this group tackles issues around safety, emissions, and regulations. It interacts with both domestic and international stakeholders like IMMA, to ensure India's regulatory stance aligns with global trends while addressing specific industry needs.

The Indian two-wheeler industry achieved the million-units retail milestone for the first time in fiscal year 2024-25, showcasing adaptability, strategic growth, and technological advancement amid shifting market conditions. Electric 2W OEMs sold over 11,49,307 units in 2024-25, up 21% on 2023-24's 9,48,508 units, propelled by rising consumer interest, enhanced charging infrastructure, and favourable cost dynamics. The segment continues to be a cornerstone of India's sustainable mobility transition, supported by a steady stream of new product introductions and expanding model diversity.

India's two-wheeler regulatory framework has matured significantly, aligning with European / International standards while incorporating region-specific requirements tailored to Indian road conditions and usage patterns. This dual approach has positioned Indian two-wheelers among the most compliant globally in terms of safety and emission norms. In 2024-25, regulatory bodies, in collaboration with SIAM, continued to strengthen the compliance landscape by refining technical standards and enforcement mechanisms. These efforts ensure that vehicles not only meet global benchmarks but also address domestic mobility needs effectively. SIAM, in alignment with the government's vision, is actively exploring the integration of advanced safety technologies to further enhance reliability and rider protection. This forward-looking approach reinforces the role of two-wheelers as a safe, efficient, and sustainable mode of transport for millions across the country.

In 2024-25, SIAM's two-wheeler group continued actively engaging in international platforms including JAMA and IMMA meetings, where India's alignment with global standards and technological advancements was prominently showcased. These interactions highlighted the industry's commitment to harmonization and earned commendation from global stakeholders for its progressive approach.

During year of record 2W sales, SIAM's two-wheeler group strengthened global-standard compliance, advanced ethanol blending, pioneered FFV tech, and initiated BS7 emission norms.

SIAM continued to lead the industry's decarbonization journey through a comprehensive ecosystem strategy. The EV infrastructure witnessed further expansion, with increased deployment of charging stations across urban and semi-urban regions. These developments alleviated range anxiety and supported broader EV adoption. While strong policy backing and indigenous innovation remain key enablers, the industry still faces hurdles in fully capitalizing on global EV opportunities. Addressing affordability and ensuring policy consistency will be essential to sustaining long-term growth.

With the successful nationwide implementation of E20 fuel, the government has now turned its focus to advancing ethanol blending beyond E20, exploring higher blends such as E27. In response, SIAM has initiated collaborative efforts with regulatory authorities to define standards for these advanced blends. This initiative aligns with India's broader energy diversification goals, aiming to reduce reliance on fossil fuels and promote renewable alternatives. The industry is proactively preparing for future vehicle compatibility and infrastructure readiness to support this transition.

In accordance with government directives, SIAM members have continued the practice of labelling all E20-compliant vehicles to ensure consumer awareness and prevent misfuelling. As the government advances its exploration of higher ethanol blends, SIAM is actively collaborating with industry stakeholders to assess the impact of these blends on existing vehicle platforms. These studies aim to ensure technical compatibility and pave the way for a seamless transition to higher ethanol usage in the future. These efforts underscore the industry's dedication to promoting cleaner fuels

and advancing environmental sustainability within India's automotive landscape.

SIAM 2W group has developed and demonstrated FFV (Flex Fuel Veh) technology which can use Ethanol blend from E20-E85, hence giving excellent flexibility to the Govt to use higher availability of Ethanol, which will enhance the self-reliance.

SIAM 2W group is ready to mass produce FFVs as soon as key enabler are provided namely E85 fuel road map, GST concession on FFV, E85 price correction proportionate to lower energy content.

In line with India's commitment to progressively tighten vehicular emission standards, discussions commenced on the development of Bharat Stage 7 (BS 7) norms specifically tailored for two-wheelers.

SIAM's two-wheeler group has initiated India-specific technical studies to support this transition, focusing on real-world applicability and cost-effective implementation. Also, deliberations on the concept of a "forced repair" system has started - wherein clearly visible / audible indication given to the rider once the Malfunction Indicator Lamp (MIL) is triggered. This mechanism is intended to ensure/compel for timely repairs by users, thereby ensuring that vehicles with emission-related faults do not continue to operate unchecked. Such measures are expected to significantly enhance emission compliance and reinforce the integrity of future emission control frameworks. These forward-looking initiatives reflect the industry's proactive stance in supporting cleaner air and more responsible vehicle ownership.

Members at SIAM Two Wheeler Group Meeting

Key Deliverables & Activities 2024-25

Deliverable:	**Stakeholders:**
To advance the Indian two-wheeler industry through responsible growth and proactive regulatory alignment.	Membership / Society

Key Activities/Measures:

- Implementation of E20 Monofuel Type Approval: The industry successfully initiated type approval processes for all two-wheeler models compatible with E20 monofuel, aligning with national fuel transition goals and ensuring readiness for cleaner energy adoption.
- Industry had developed FFV (Flex Fuel Veh) for usage of any blend between E20-E85 and demonstrated mass production readiness which will give flexibility for higher Ethanol usage hence enhance self-reliance.
- Technical Collaboration through SIAM–JAMA Engagement: A focused technical exchange meeting between SIAM and JAMA was conducted, fostering deep knowledge sharing and strengthening international collaboration on regulatory and technological advancements.
- Successful Adoption of OBD 2B: The two-wheeler industry achieved full compliance with On-Board Diagnostics (OBD) Stage 2B, enhancing real-time emission monitoring and reinforcing India's commitment to stringent environmental standards.
- Participation in Global Regulatory Forums: Indian stakeholders increased their involvement in international regulatory discussions and formulation processes, ensuring that domestic perspectives are represented and harmonized with global best practices.

THREE WHEELER GROUP

Members at SIAM 3W Group meeting at ARAI, Pune.

This group focuses on promoting low-cost mobility through three-wheelers, addressing safety, emissions, and compliance under programs such as FAME and PLI. It also engages in advocacy for improving financing access for three-wheelers under priority sector lending, ensuring industry preparedness and growth in this segment.

The Indian Three-Wheeler industry experienced a significant surge in the last year, primarily driven by a strong shift towards electric vehicles. The Society of Indian Automobile Manufacturers (SIAM) has been always working towards promoting sustainable mobility solutions with cutting edge technologies. Notable improvements have been made in various aspects like emission standards, adoption of alternative fuels and promotion of electric mobility which have also resulted in significant increase in sales of electric 3-wheeled vehicles.

To promote sustainable mobility solutions and circular economy, Government of India has come out with Extended Producer Responsibilities (EPR) for batteries, tyres, used oil, plastics etc. for motor vehicles including three wheelers. SIAM has extended full support and collaboration with multiple stakeholders to work towards compliance of respective EPRs.

SIAM under its initiative "Hydrogen Mobility" has proactively prepared Hydrogen safety standard for two wheelers, three wheelers and quadricycles. The draft standard AIS 206: "Safety and Procedural Requirements for Type Approval of Hydrogen Powered L Category vehicles (Liquid / Compressed gaseous hydrogen)" were approved during 62nd meeting of CMVR-TSC.

SIAM aids in sustainable three-wheeler growth through EV adoption, EPR compliance, hydrogen standards, and regulatory alignment, supported by government incentives.

Three-wheeler industry is now gearing for adoption of advance On-Board Diagnostic (OBD) stage II-B norms from 1st April 2025. MoRTH has also mandated type approval of all vehicles with E20 reference fuel from 1st April 2025.

SIAM is fully committed to comply with E20 norms and support the government's ethanol blending program in the country. To further improve user convenience and efficiency of three wheeled vehicles, SIAM has proposed an option of providing tyre repair kit instead of spare wheel. This proposal also received a go ahead during 62nd meeting of CMVR-TSC.

SIAM's unwavering commitment and collaborative endeavors will continue to promote affordable & sustainable mobility solutions to the customers. Government of India's policy support through key schemes like EMPS-2024 & PLIs is further catalysing the adoption of electric vehicles. The electric three-wheeler segment witnessed a remarkable increase in sales last year.

Key Deliverables & Activities 2024-25

Deliverable:	**Stakeholders:**
To ensure the growth of the 3W industry in India in a sustainable manner and navigate the industry through regulation formulation	Membership/Society/Government

Key Activities/Measures:

- Mandatory Type approval of three wheelers with E20 reference fuel from 1st April 2025. (similar to other motor vehicles)
- Introduction of New Category Vehicles by MoRTH
- “L2-5: Three wheeled motor vehicle, with a 2 & 3-wheeler combination module”
- Electric Mobility Promotion Scheme (EMPS)-2024 for two and three wheelers was published for 4 months starting from 1st April to 31st July 2024 and then extended by 2 more months up to 30th September 2024
- New standard AIS-206 formulated on Safety and Procedural Requirements for Type Approval of Hydrogen Powered L Category vehicles (Liquid / Compressed gaseous hydrogen)

CONNECTED VEHICLES GROUP

This group supports the industry's transition toward connected and autonomous vehicle technologies by facilitating innovations in vehicle-to-vehicle (V2V), vehicle-to-infrastructure (V2I), and vehicle-to-cloud (V2C) communication. It provides a forward-looking vision on how connected vehicle technologies can improve road safety, environmental quality, and mobility efficiency. The group also tracks advancements in autonomous vehicle systems and addresses related regulatory and technological issues.

India, as the largest global producer of two-wheelers and the fourth-largest car market, continues to address mobility challenges such as road safety, traffic congestion, and fuel consumption in its urban areas.

SIAM has maintained continuous engagement with the Ministry of Road Transport and Highways (MoRTH) and the Department of Telecommunications (DoT), advocating for the delicensing of frequency bands to enable automotive applications and facilitate the deployment of connected vehicle technologies. Detailed proposals have been submitted, and discussions are ongoing to finalize these measures.

As a member of the MoRTH-led Taskforce on Vehicle-to-Everything (V2X), SIAM has actively contributed to shaping policies and standards for V2X communication, ensuring that India's approach remains aligned with global best practices.

SIAM advances connected vehicle technologies through policy advocacy, global collaborations, and industry partnerships to build a smarter mobility ecosystem.

On 19 February 2025, SIAM partnered with the Ministry of Internal Affairs and Communications, Japan, to host a technical workshop and live demonstration on V2X systems. This event promoted knowledge sharing and deepened collaboration between Japan and India in advancing next-generation connected mobility solutions.

In addition to policy advocacy, SIAM has worked closely with IIT Bombay and L&T Technology Services to deliver detailed insights on V2X technologies to its members, enhancing industry readiness for adopting advanced mobility solutions.

Through these efforts, SIAM continues to drive advancements in connected vehicle technologies, fostering collaboration among stakeholders to create a smarter and more sustainable mobility ecosystem in India.

Key Deliverables & Activities 2024-25

Deliverable:	**Stakeholders:**
Policy Advocacy for formulation of guidelines/policies and ease implementation hurdles in Automotive Regulations	Membership/Government

Key Activities/Measures:

- Submission to DoT on delicensing frequency bands for automotive use.
- Submission to MoRTH on GNSS tolling implementation timelines.
- Participation in TEC Taskforce on V2X.
- Workshop with Embassy of Japan on V2X systems.
- Collaboration with Academia and Technology providers on V2X technologies.

FRONTIER TECHNOLOGY AND INNOVATIONS GROUP

Tasked with identifying future technologies that will shape road mobility, this group explores options like hydrogen internal combustion engines, fuel cells, and non-motorized transport. It develops long-term mobility scenarios and white papers, while supporting R&D, advanced engineering, and indigenous innovation. The group works to enhance India's global competitiveness by promoting cutting-edge research in vehicle design, engine technology, batteries, sensors, and alternative fuels.

As India advances its position as a global leader in automotive innovation, SIAM's Frontier Technology and Innovations Group (FTIG) continues to champion industry-driven advancements, promote sustainable practices, and accelerate the adoption of cutting-edge technologies in the mobility sector. Over the past year, SIAM has played a pivotal role in advancing hydrogen applications as an alternative fuel, building on the momentum of the National Green Hydrogen Mission (NGHM) and contributing to the nation's clean energy transition. The following highlights outline the key developments from July 2024 to June 2025.

SIAM's FTIG advanced hydrogen mobility through R&D, pilot projects, exhibitions, and policy advocacy, strengthening India's sustainable automotive leadership.

In its role within Hydrogen Applications R&D Projects, SIAM served as a member of Sub-Committee III under the NGHM R&D roadmap, where it collated and proposed critical research and development topics essential for the growth of hydrogen technology. The committee reviewed and evaluated project proposals to ensure they were aligned with national priorities for hydrogen production, storage, and application in mobility. SIAM's inputs have been instrumental in shaping research priorities that support India's long-term transition to a hydrogen-powered economy.

For Hydrogen Mobility Pilot Projects, SIAM maintained its active involvement in initiatives funded under the NGHM, working closely with ARAI and the Ministry of Road Transport and Highways (MoRTH). These projects focus on developing and deploying hydrogen-powered vehicles to demonstrate the viability of hydrogen as a clean fuel. The pilots are designed to generate valuable operational data that will guide future policy frameworks, infrastructure development, and industry adoption strategies.

During the 3rd ISTEM Conference at Bharat Mobility Global Expo 2025, SIAM hosted a dedicated session on hydrogen as a future fuel. The session brought together leading experts to discuss advancements in hydrogen production, storage solutions, and vehicle integration. Emphasis was placed on the importance of collaborative efforts between industry, academia, and government to address technical and infrastructure challenges. The discussions reinforced hydrogen's potential as a cornerstone of India's sustainable mobility transition.

At the Bharat Mobility Global Expo 2025, SIAM curated a Decarbonization Zone that showcased the latest hydrogen-powered vehicles, advanced low-emission technologies, and informative panels. The pavilion highlighted the contribution of these innovations to reducing emissions and achieving India's decarbonization targets.

Members at SIAM Frontier Technology and Innovations Group Meeting

At India Energy Week 2025, SIAM presented the Sustainable Mobility Pavilion, featuring advanced vehicle technologies and demonstrating the role of alternative fuels in the broader energy transition. The pavilion facilitated high-level dialogues on

scaling up sustainable mobility solutions and served as a hub for showcasing innovation.

Similarly, at the Smart Mobility Expo 2025, SIAM's Sustainable Mobility Pavilion emphasized the integration of advanced fuel technologies, particularly hydrogen, into both urban and intercity transport systems. The exhibit featured interactive demonstrations and facilitated discussions on how hydrogen solutions can be effectively embedded into India's mobility ecosystem.

As the convener of NGHM Sub-Group III, SIAM continued to lead the evaluation of R&D project proposals in hydrogen applications. This role involves ensuring that the proposed projects are industry-relevant, technically sound, and aligned with national objectives, thereby fostering innovation and accelerating practical advancements in hydrogen technologies.

Through its sustained efforts in research collaboration, policy advocacy, and industry engagement, SIAM reaffirms its commitment to advancing sustainable mobility solutions and clean energy adoption. These initiatives strengthen India's leadership in the global clean technology space and set the foundation for a greener automotive future.

Key Deliverables & Activities 2024-25

Deliverable:	**Stakeholders:**
To ensure smooth transition to New Technologies	Membership/Government
Key Activities/Measures:	
• SIAM's Role in Hydrogen Applications R&D Projects • Hydrogen Mobility Pilot Projects • 3rd ISTEM Conference at Bharat Mobility Global Expo 2025 • Hydrogen Vehicle Display at Decarbonization Zone – Bharat Mobility Global Expo 2025 • Sustainable Mobility Pavilion at India Energy Week 2025 • Sustainable Mobility Pavilion at Smart Mobility Expo 2025 • SIAM Convener of NGHM Sub-Group III	

QUALITY COMPLIANCE, SERVICE, INSPECTION, MAINTENANCE & CERTIFICATION GROUP

Members at SIAM Quality Compliance, Service, I&M, Certification Group Meeting, Tata Lake House, Pune

This SIAM Quality Compliance, Service, Inspection& Maintenance and Certification group addresses compliance with EPR mandates for waste categories like oil, plastics, tyres, and ELVs, and manages public grievance systems. It promotes awareness on right to repair, robust inspection and certification systems (including ATS), and sustainable service practices. The group also works on policy issues affecting dealers and service networks.

The Group has been proactively driving initiatives to strengthen the vehicle recall ecosystem. In close collaboration with MoRTH, the group has contributed to the development of the Vehicle Recall Portal, enabling transparent reporting and monitoring of recall activities. Since the portal's inception, SIAM and its member companies have been committed to regularly updating recall data in line with MoRTH's regulatory requirements, effective from April 1, 2021. These efforts aim to enhance consumer safety and minimize road accidents by ensuring timely identification and rectification of faulty vehicles.

Fire Incident Reporting and Analysis

MoRTH, in the CMVR-TSC, opined on the need for a national portal to record vehicle fire incidents. A subgroup under ICAT including SIAM members is currently deliberating on creating a Standard Operating Procedure (SOP) for fire incident investigations. ICAT has also proposed a RASIC chart covering the entire process of fire incident reporting and subsequent incident analysis

Right to Repair Framework and LiFE Initiative

The Right to Repair framework, aligned with the Lifestyle for Environment (LiFE) initiative launched by Hon'ble Prime Minister Shri Narendra Modi in 2021, was introduced by the Ministry of Consumer Affairs in July 2022. Supporting circular economy goals, it aims to enhance product lifespan, maintenance, reuse, recyclability, and waste management. The framework initially covers farming equipment, mobile devices, consumer durables, automobiles, and their components.

Key Deliverables & Activities 2024-25

Deliverable:	**Stakeholders:**
To address challenges in maintenance procedures and post-sale issues faced by OEMs	Society/ Membership /Government
Key Activities/Measures:	
• Actively contributed towards frequent updation of Vehicle Recall Portal under the aegis of MoRTH.	

STYLING & DESIGN GROUP

This Group assists the industry in enhancing design engineering and styling capabilities that reflect customer aspirations. It facilitates exposure to new trends and advanced software tools through expert interactions and events. The group also organizes national design competitions and conclaves, nurturing innovation and creativity among students and professionals in automotive styling.

As part of its ongoing commitment to nurturing talent and strengthening design capabilities in India, SIAM's Styling & Design Group has been playing an important role in bridging the gap between academia and the automotive industry. By encouraging collaboration among design students, professionals, academicians, and industry stakeholders, the group aims to advance the design dialogue in the country.

One of the key highlights of the year was the successful organisation of the 19th Styling & Design Conclave and the 17th Automotive Design Challenge (ADC) on 26th March 2025 in New Delhi. Themed "Innovating Today, Inspiring Tomorrow's Mobility," the conclave focused on the transformative role of styling in the future of mobility. The event brought together prominent automotive designers from India and abroad to exchange perspectives, share global trends, and explore new directions in vehicle aesthetics.

Running parallel to the conclave, the 17th edition of ADC, SIAM's annual design competition for students, was held with the theme "Blending Retro Aesthetics with Future Technologies." After rigorous evaluation and multiple shortlisting rounds, 10 finalists were selected to present their physical models at the conclave. These innovative designs were reviewed by a jury of renowned experts based on creativity, thematic relevance, and execution.

The winners of ADC 2024 were felicitated during the conclave. Mr. Vedant Barve from MIT Institute of Design secured the top honour, followed by Mr. Naga Karthik Jonnala from Strate School of Design as the first runner-up. Mr. Rajat Sisodia from the National Institute of Design and Mr. Anurag Ramteke from Strate School of Design were jointly declared as second runners-up.

The conclave witnessed participation from over 150 delegates, comprising professionals from OEMs, component manufacturers, design institutions, and students. It served as a vibrant meeting point for the country's automotive design fraternity.

Going forward, SIAM's Styling & Design Group plans to further scale up its efforts by launching new initiatives in collaboration with stakeholders, aimed at promoting Automotive Styling & Design as a strong and aspirational career path in India.

Key Deliverables & Activities 2024-25

Deliverable:	**Stakeholders:**
Strengthening Regulatory Frameworks	Society/ Membership
Key Activities/Measures:	
• Organised 19th edition of Styling & Design Conclave in consultation with group members • Organised the 17th edition of the Automotive Design Competition (ADC) for design students. Physical models of the top 10 entries were evaluated on-site by the jury, and the top 3 students were awarded.	

MANUFACTURING, INDUSTRY 4.0 AND EASE OF DOING BUSINESS -MANUFACTURING GROUP

This group supports industry adaptation to advanced manufacturing under Industry 4.0. It focuses on integrating IoT, AI, robotics, augmented reality, and big data across the automotive value chain. It also promotes seamless supply chain interoperability, efficiency enhancement, and supports regulatory and policy frameworks that ease manufacturing operations.

The emergence and adoption of new and advanced technologies such as artificial intelligence (AI), the Industrial Internet of Things (IIoT), digital twins, high-speed networks, cloud computing etc. are transforming the manufacturing industries globally and in India. These innovations are enabling manufacturing processes to operate with greater precision, optimize production, enhance product quality, safety, efficiency, predict failures, and minimize downtime through predictive maintenance.

In India, several companies have already implemented smart sensors, IoT devices, and automation technologies to enhance operational efficiency and enable predictive maintenance.

While new and advanced technologies are enabling industries to become more efficient, precise, and productive, industrial automation is facing several challenges. The major challenges currently faced by digitalized industries include:

1. **Data Interoperability:** Lack of standardized approaches for data management poses a significant challenge in exchanging data within organizations and between related organizations for business purposes.
2. **Skilling:** Upskilling and skilling the workforce in new and advanced technologies remains a significant hurdle.
3. **Security:** The increased use of smart devices and IoT for connecting various devices within the industry also raises security concerns. Transferring critical data over digital platforms introduces risks from a security perspective.

In this context, SIAM has established a group focused on Industry 4.0 to guide the industry in implementing and integrating the technologies associated with this new industrial paradigm. This includes the

- **Adoption and use of new and advanced technologies:** Industrial Internet of Things (IIoT) Big data and analytics, Artificial intelligence (AI) and machine learning, Robotics etc. for making industry future ready with more efficient, precise and productive manufacturing processes.
- **Skilling and Upskilling of the Workforce:** Enhancing the skills of the current workforce and training new talent to meet the demands of Industry 4.0.
- **Connected Interoperable Cyber-Physical Systems:** Integrating computing, communication with the physical processes to create a seamless and interconnected industrial environment.
- **Adoption and Use of Standards for Interoperability:** Implementing standards for hardware and software to ensure interoperability across different systems and platforms.

CSR & COMMUNITY SERVICES GROUP

SIAM member companies have been actively engaged in Corporate Social Responsibility (CSR), demonstrating a long-standing commitment to sustainable development and consistently giving back to communities-particularly those surrounding their manufacturing facilities, as well as in various regions across the country.

To further strengthen and scale these efforts, SIAM constituted the CSR Group - a collaborative platform aimed at:

- Facilitate interaction and collaboration among members
- Share CSR best practices
- Consolidate and showcase the impactful work undertaken by member companies
- The SIAM CSR Group plays a crucial role in communicating these efforts to policymakers and the media, helping foster an ecosystem of goodwill.
- In addition to internal knowledge sharing, SIAM members actively participate in cross-learning initiatives to enhance future CSR outcomes. The group also recognizes the contributions of NGOs that partner with member companies through the SIAM CSR Awards, presented at the annual CSR Conclave.
- Through these collective actions, SIAM continues to strengthen its commitment to meaningful, inclusive, and sustainable social development across India.

SIAM has made sustainability through social empowerment one of its core objectives. Through the collective efforts of its member companies, SIAM is actively fostering the development of an inclusive community - one that is supported by sustainable and long-term impact.

Since the early 2000s, SIAM initiated its journey with **Road Safety Awareness programmes.** Over the years, its scope has expanded to include a few additional key areas in inclusive social development.

Additional Key Areas:

- Education and Skill Development
- Healthcare and Sanitation
- Environmental Rejuvenation

Through these initiatives, SIAM continues to contribute to building a socially equitable and environmentally sustainable future.

SIAM CSR Group Members at the meeting being hosted at Honda Samajik Vikas Kendra, Gurgaon

Key Deliverables & Activities 2024-25

Deliverable:	Stakeholders:
CSR activities across Road Safety, Education and Skill Development, Healthcare and Sanitation, Environment	Membership / Communities

Key Activities/Measures:

- SIAM-KVS Road Safety Education Program: SIAM and KVS launched a nationwide online road safety program for school students under the "सुरक्षित सफर" (Safe Journey) campaign.
- SIAM Road Safety LMS Portal: A dedicated LMS section was created for members to share road safety materials.
- Surakshit Safar Pavilion: At Bharat Mobility Global Expo 2025, SIAM hosted an interactive pavilion on road safety.
- SAFAR Summit: SIAM organised the inaugural Summit for Automotive Future Advancement in Road Safety in January 2025.
- MoU with Brazil: SIAM signed an MoU with Brazil to collaborate on ethanol, fostering knowledge exchange and alternative fuel promotion.
- Jal Sanchay Jan Bhagidari: At MoJS's request, SIAM encouraged members to adopt water conservation measures at facilities and in communities.
- Skill Development: SIAM and Deloitte studied EV skill gaps and job potential.
- Health & Sanitation: SIAM and members conducted driver health checkups and CPR training.

TWO-WHEELER CEOs COUNCIL

The two-wheeler segment posted a steady growth in FY 2024-25, with total sales reaching 1,96,07,332 units, marking a 9.1% increase over the previous year's 1,79,74,365 units. Among the sub-segments, Scooters witnessed the highest growth at 17.4%, rising from 58,39,325 units to 68,53,214 units. Motorcycles continued to dominate in volumes, growing by 5.1% from 1,16,53,237 units to 1,22,52,305 units, while Mopeds saw a modest 4.2% increase, from 4,81,803 units to 5,01,813 units. This overall growth highlights the sustained demand for personal mobility and improving rural market sentiment.

For the year 2024-25, the Two-Wheeler CEOs Council undertook several key discussions across sustainability, safety, and regulatory domains. On the End-of-Life Vehicle (ELV) Policy, SIAM submitted recommendations to MoEF&CC proposing a fixed ELV age of 20 years, revised EPR targets, enforcement penalties, and discouragement of informal scrapping, along with strategies to systematically retire vehicles. In promoting Flex Fuel Vehicles (FFVs), discussions with MoRTH focused on pricing and infrastructure, with four states-Maharashtra, Karnataka, Tamil Nadu, and Uttar Pradesh-identified for rollout, and E20-E85 vehicles to be showcased at Auto Expo 2025. The Council also proposed India's leadership in the Global South Alliance (GSA) to accelerate 2W decarbonization. A collaboration was supported with JP Research Institute to conduct a road safety study using accident data for evidence-based interventions. On CAFÉ norms, the Council recommended revising the 2W CO baseline to 41.48 g/km (from 40.45 g/km) and is drafting a long-term strategy to reduce this to 4.15 g/km by 2060 in line with net-zero goals. Initial discussions began on adopting BSVII norms for 2Ws, including a 20% CO reduction, aldehyde limits, and deterioration factor application. Regarding Acoustic Vehicle Alert Systems (AVAS) for electric 2Ws, a two-phase study was proposed in collaboration with IIT Delhi and ARAI with a tentative budget of ₹2 crore. The Council advocated a unified industry stance supporting rider safety with flexibility in technology choices like CBS/ABS. A concise BS7 policy briefing slide was prepared for ministerial use. Additionally, the ELV proposal was updated to include pre-BS2 and BS2 vehicles, integrating pollution and safety considerations.

Mr K N Radhakrishnan, Director & CEO, TVS Motor and Chair, Two Wheeler CEOs Council along with Senior Industry Members at CEOs Council Meeting, Bangalore

THREE-WHEELER CEOs COUNCIL

Three-wheelers offer an affordable and fuel-efficient mode of transport, playing a critical role in enhancing last-mile connectivity across India. With the growing demand for efficient urban and rural mobility solutions, India's three-wheeler market is projected to grow at a robust double-digit CAGR in the coming years.

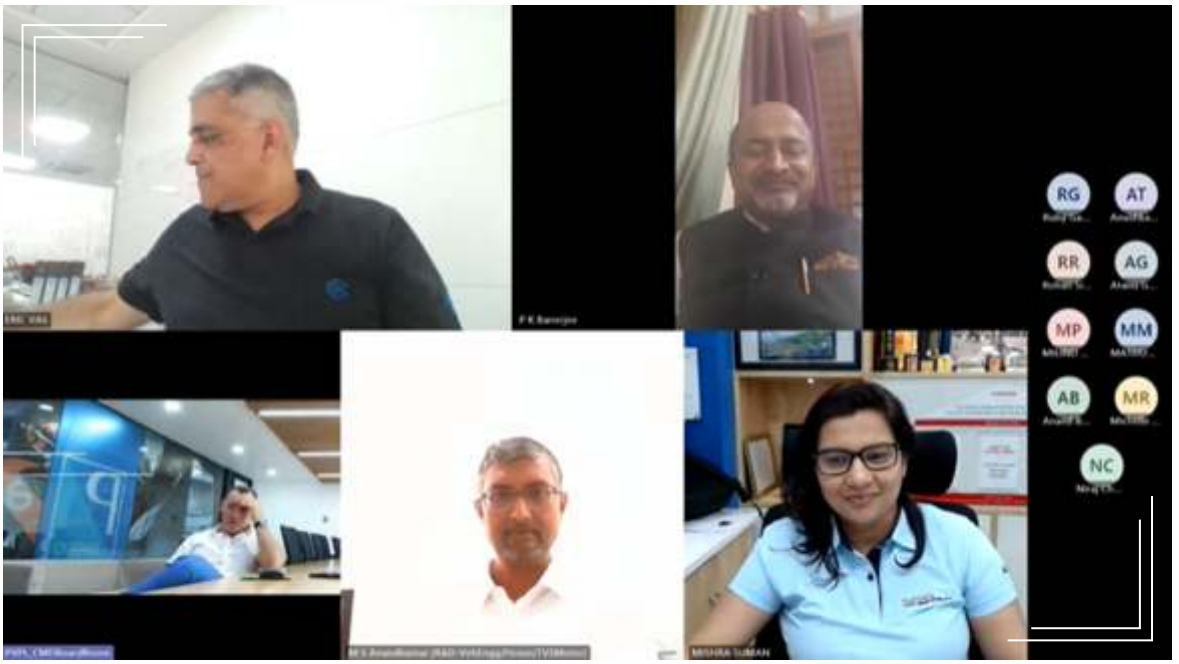
As the world's largest producer, consumer, and exporter of three-wheelers, this segment is intricately linked with key economic activities that impact a broad base of the population. The strategic insights and guidance provided by the SIAM Three-Wheeler CEOs Council have consistently enabled SIAM to advance its efforts in aligning the industry with evolving global safety and emission standards.

The sales volume of three-wheelers has seen a steady rise over the past year, driven by concerted efforts from the industry. In FY 2024-25, a total of 7,41,420 three-wheelers were sold in India, marking a 6.7% year-on-year growth compared to 6,94,801 units sold in the previous fiscal. Passenger 3W sales registered a 7.0% increase while Goods 3W grew by 5.1%.

SIAM 3W CEOs Council continues to work for the benefit of the three-wheeler industry by creating a clear path for decisions and engagement with the government. This year, the Council focused on critical policy issues including promoting electric 3-wheelers under central schemes such as PM E-Drive and suggesting flexible allocation of EV funds for L5 category vehicles.

Amid emerging regulatory pressures, including directives from the Supreme Court and other authorities, the Council reviewed proposals for full electrification in cities like Delhi and Mumbai. SIAM advocated for a phased, data-driven approach that balances the transition to electric mobility with parallel strategies like scrapping older vehicles and promoting cleaner fuel alternatives.

The Council also agreed to present a united industry view and continued discussions with government departments to shape practical rules and timelines without disrupting the market. These efforts reflect SIAM's commitment to sustainability, policy support, and smooth transition to cleaner mobility in the 3W sector.



Industry Leaders at SIAM 3W CEOs Council Meeting

PASSENGER VEHICLE CEOs COUNCIL

The domestic sales for the passenger segment led the growth with overall production touching more than 5 million units in FY 2024-25, including 4.3 million units domestic sales with a growth of 2.0% over FY 2023-24. The Council deliberated on two major policy areas:

Vehicle Scrappage Policy

The Council emphasized the importance of the Certificate of Deposit, the discount percentage applicable to the vehicle's residual value, and the incentives for Registered Vehicle Scrapping Facilities (RVSFs). These elements were highlighted as critical to ensuring effective implementation and industry participation.

Formulation of a New EV Manufacturing Policy for India

The Council advocated for revisions to the PLI Auto Phase-II scheme and a rationalization of import duties to facilitate the adoption of advanced technologies. It also stressed the need to develop indigenous technologies and harness local talent to strengthen the domestic auto manufacturing ecosystem.

SIAM was urged to present a comprehensive representation to the Ministry of Heavy Industries (MHI), Ministry of Commerce (MoC), and the Department for Promotion of Industry and Internal Trade (DPIIT). The focus should be on advocating for industry protection, particularly in support of local manufacturing initiatives.

COMMERCIAL VEHICLE CEOs COUNCIL

The SIAM Commercial Vehicle CEO Council works on boosting demand and drive industrial growth in the country. It meets regularly to define a clear roadmap and take strategic decisions to advance the commercial vehicle sector.

Economic Growth and Industry Performance

Amidst a strong economic growth of 7.6% driven by the Government of India's supportive policies, the Indian Automobile Industry recorded steady progress in FY 2024-25, with the domestic industry growing by 12.5% in FY 2023-24 and maintaining positive momentum. The domestic Commercial Vehicle segment sales reached around 0.97 million units in FY 2024-25, reflecting marginal growth YoY. A decline in LCV and SCV sales, primarily due to the degrowth in the CNG segment, impacted overall performance. Additionally, the industry's overall shift towards higher tonnage trucks, offering greater payload capacity, influenced growth trends, though this transition is not fully captured in unit sales figures.

The long-term outlook for the CV sector remains positive, supported by a strong macroeconomic environment, rising infrastructure investments, healthy replacement demand (especially for passenger vehicles), and improving freight activity.

To advance decarbonization in the heavy-duty truck segment, the industry is exploring multiple green fuel and technology pathways. Given the cost sensitivity nature of the sector, OEMs are adopting a technology-agnostic approach to achieve zero carbon emissions by leveraging a mix of fuels and technologies:

- **Battery Electric Vehicles (BEVs):** While offering zero emissions, BEVs face challenges due to high upfront costs, limited charging infrastructure, and reduced payload capacity caused by battery weight. Adoption remains limited in the heavy CV space.
- **Hydrogen ICE Technology:** Hydrogen internal combustion engines offer a cleaner alternative with minimal changes to existing IC engine architecture. This technology gained prominence at Auto Expo 2023 and Bharat Mobility Global Expo 2024 as a viable low-carbon solution for heavy trucks.
- **LNG-Powered Vehicles:** LNG presents a cleaner fuel alternative with reduced emissions compared to diesel and CNG. However, refuelling infrastructure remains a key enabler. On April 9, 2024, MoPNG directed SIAM to submit a detailed plan for the rollout of LNG infrastructure, including location-wise justification tied to traffic flows, vehicle categories, and fuel demand. SIAM's recommendations are currently under review.

Industry Commitment to Green Mobility

Aligned with India's goal of reducing emissions intensity by 45% by 2030, the CV industry is transitioning from low-carbon fuels (CNG, LNG) to zero-carbon solutions (Hydrogen ICE, EVs). Efforts under the SIAM CV CEO Council have outlined a phased roadmap for to support the decarbonisation efforts:

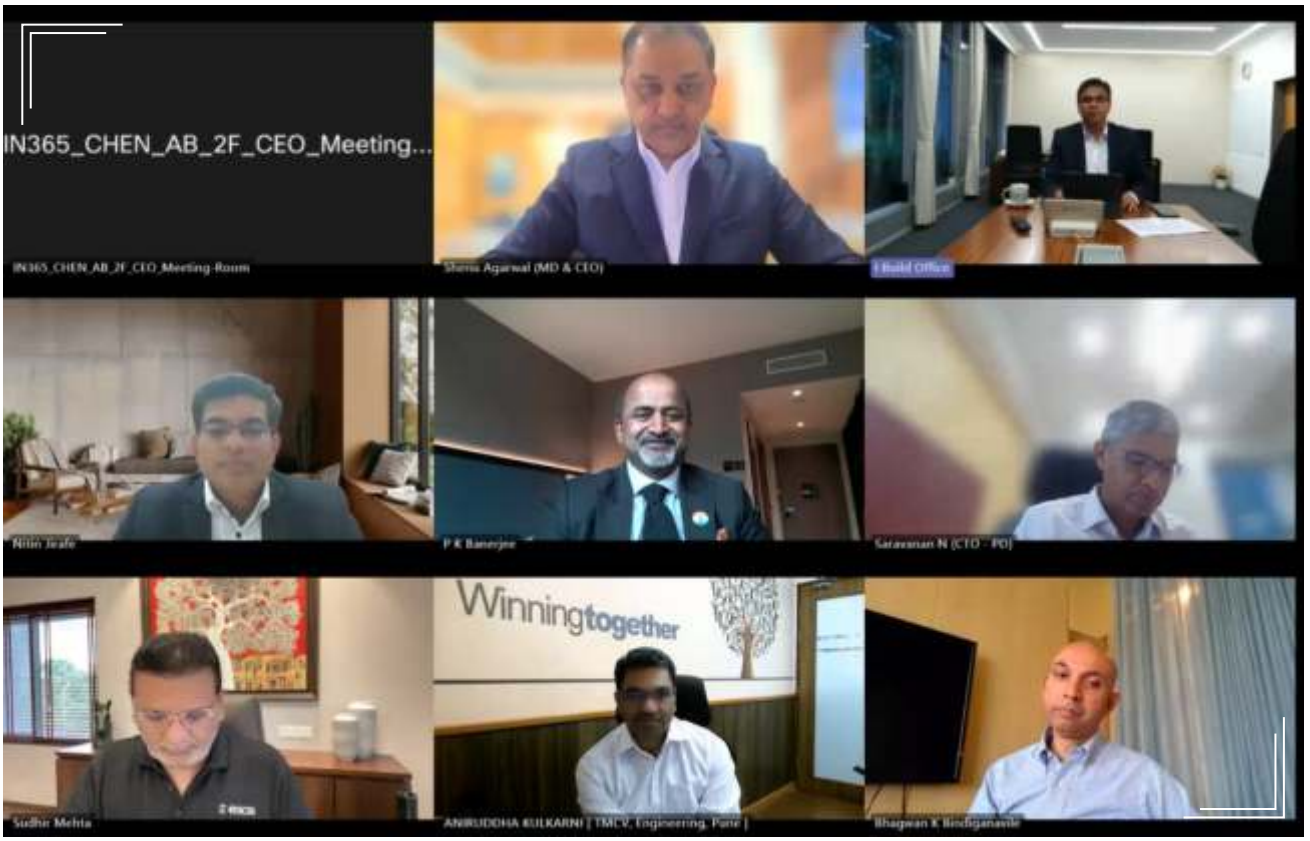
- Promote CNG as a transition fuel until FY 2030, with a gradual shift to EVs in the LCV segment
- Deploy adequate Natural Gas infrastructure which can increase the adoption of LNG vehicles in the MHCV segment from FY25 to FY35

Activities conducted under SIAM CV CEO Council

- Rollout of the Fuel efficiency norms under the Energy Conservation Act, 2001 commenced from April,2023, with the exclusion of tippers; the norm is in line with the request of the council.
- The group under CV council completed the initial scanning of the development of Bharat VECTO tool to define the next stage of FE regulations which shall require engagement of the CV industry with the test agencies in future.
- The CV CEO council worked in closed coordination with MORTH to tried to issue a notification ensuring level playing field for both OEMs manufacturing Buses and the Bus Body

builders. Government of India has now eliminated the provision of self-certification of the Bus Body built by a Bus Body fabricator and instead, made it mandatory that testing and approval of Body building of Buses with seating capacity of 13 or more passengers, excluding driver, has to be done by the Test Agencies. Hence, all new buses, whether manufactured by OEM or fabricated on a drive-away chassis by a Body builder has to be uniformly tested and with same parameters, for obtaining a Bus Body Certificate.

These collective efforts underscore the industry's commitment to cleaner, safer, and more sustainable commercial mobility solutions. Companies in India are working on innovative technologies to utilise LNG fuel in heavy-duty trucks to ensure reduced carbon emissions in the Indian transportation sector.



Sr. Industry Members at SIAM CV CEOs Council Meeting

ROAD SAFETY ACTIVITIES UNDER SAFE

Road safety has emerged as a critical global concern, with road traffic accidents ranking among the leading causes of death and injury worldwide. According to the World Health Organization (WHO), road crashes claim approximately 1.19 million lives[xxi] and cause countless serious injuries and disabilities annually. Road crashes are the leading cause of death for children and young adults aged 5-29, and rank as the 12th leading cause of death for people of all ages, surpassing HIV/AIDS, tuberculosis, and malaria.[xxii]

Road safety is not just a transportation issue - it is deeply linked to public health, economic development, and the Sustainable Development Goals (SDGs), particularly SDG Target 3.6, which seeks to halve global deaths and injuries from road traffic crashes. SDG Target 11.2 calls for safe, sustainable, and accessible transportation systems for everyone, with an emphasis on people in vulnerable situations, women, children, older adults, and people with disabilities.

India is prepared to face this issue head-on by setting an ambitious target of reducing at least 50% of road traffic deaths and injuries by 2030[xxiii]. India has been taking significant strides in creating a technology-driven and accountability-focused approach to road safety. In recent years, dedicated institutions like the Centre for Advancement of Road Traffic Safety (CARTS) have been established to support Zero Fatality Corridor and District programmes. These initiatives leverage data analytics to identify crash hotspots and aim to reduce road fatalities by more than 50 percent. Projects like iRASTE in Nagpur which is powered by AI, integrate collision avoidance systems, mobility risk mapping, and infrastructure audits, with the goal of drastically reducing accidents and serving as scalable models for other regions.

The government has also pushed for higher standards in road infrastructure, calling for better Detailed Project Reports (DPRs), improved signage, and adherence to international engineering practices. Engineers and consultants are being held to greater accountability, and there's a strong push to improve the overall quality of road planning and design.

India is advancing road safety through initiatives like iRASTE, CARTS, iRAD, and Bharat NCAP, promoting awareness, accountability, and innovation

In the automotive sector, Bharat NCAP, India's indigenous car safety rating programme, has been introduced to guide consumers towards safer vehicles. Several key safety technologies such as Anti-lock Braking Systems (ABS) and airbags have been made mandatory in vehicles, reflecting the shared responsibility of Original Equipment Manufacturers (OEMs) in improving safety outcomes.

Further, the Integrated Road Accident Database (iRAD) has been launched to centralize accident data, enabling precise identification of high-risk areas and formulation of targeted interventions. While these collective efforts from the government and the industry represent meaningful progress, sustained public awareness and stricter enforcement remain essential to realize the national target of reducing road fatalities by 50% by 2030.

As part of its commitment to sustainable mobility and road safety, SIAM organized a series of events throughout the year to raise awareness across the country. This section provides a concise overview of the key activities undertaken by SIAM under its initiative Society for Automotive Fitness & Environment (SAFE) during the last financial year (FY25).

SAFE ANNUAL CONVENTION 2024

SIAM hosted the 25th SAFE Annual Convention and Mobility Exposition 2024 on September 24, 2024, in Bengaluru, under the theme *"United Efforts for Road Safety: Our Roads, Our Responsibility."*

The event was graced by Shri Siddaramaiah, Hon'ble Chief Minister of Karnataka, as the Chief Guest, along with Shri D. K. Shivakumar, Hon'ble Deputy Chief Minister of Karnataka, and Shri Ramalinga Reddy, Hon'ble Transport Minister of Karnataka, as Guests of Honour. Several distinguished dignitaries and industry leaders from OEMs and corporations shared valuable insights, enriching the discussions on road safety initiatives.

Chief Guest, Shri Siddaramaiah, the Hon'ble Chief Minister of Karnataka, along with Guests of Honour Hon'ble Deputy Chief Minister of Karnataka Shri D. K. Shivakumar and Hon'ble Transport Minister of the Karnataka Shri Ramalinga Reddy Inaugurating SAFE Annual Convention 2024

The Mobility Exposition showcased 12 vehicles across different categories: 2Ws, 3Ws and 4Ws and light commercial vehicles highlighting advancement in vehicle safety and environmental consciousness. The exhibition witnessed a footfall of over 1000.

Hon'ble Chief Minister and other dignitaries at Mobility Exposition at SAFE Annual Convention 2024

Along the sidelines of the SAFE Annual convention, a visit to traffic management centre in Bengaluru was also organised with the support of City traffic police where the participants were presented with an overview of the Intelligent Transport System (ITS) implemented by the Bengaluru Traffic Department to improve road safety.

Road Safety Initiatives and Recognitions at SAFE Annual Convention 2024

SIAM launched key road safety initiatives, reinforcing its commitment to safer roads:

1. **Road Safety Education:** Slogan Competition - In collaboration with the Transport Department of Karnataka, this initiative encouraged students to creatively promote road safety awareness and responsible road behaviour

A road safety education campaign of slogan competition for school students and kicking off a Helmet Awareness Drive to promote the importance of helmet use for two-wheeler riders

2. **Helmet Awareness Drive** – In partnership with Bengaluru Traffic Police and ICICI Lombard, SIAM supported the distribution of 1,250 helmets each to students and adults, emphasizing the importance of helmet use in preventing head injuries and fatalities.

Students felicitated at the Helmet Awareness Drive at SAFE Annual Convention 2024

3. **Felicitation of officers** - As a part of the convention, SIAM hosted a Felicitation Ceremony to honour traffic enforcement officers, education departments, and other key contributors for their outstanding efforts in promoting road safety. This recognition served to celebrate their dedication and inspire continued action toward safer roads for all.

Road Safety Contributor's Award Felicitation Ceremony at SAFE Annual Convention 2024

SAFE Technical Workshop – "Smart Mobility: Integrating Safety with Sustainability"

The 25th SAFE Annual Convention also featured a full-day workshop on "Smart Mobility: Integrating Safety with Sustainability," focusing on sustainable and connected mobility solutions in road safety and environmental protection. The workshop enabled dynamic knowledge-sharing among key stakeholders committed to advancing road safety.

Eminent dignitaries at SAFE Annual Convention 2024

Mr. Sushant Naik, President SAFE addressing the audience

Mr. Prashant K Banerjee, Executive Director SAFE addressing the audience

The event was graced by Chief Guest Mr. B Dayanand, IPS, Commissioner of Police, Bengaluru City, and Guest of Honour Mr. Uma Shankar, Additional Transport Commissioner, Government of Karnataka. Several distinguished dignitaries, industry leaders, and OEM representatives also participated, enriching the discussions.

Critical topics like Technological advancements in road safety in India, Emerging trends in vehicle engineering, Sustainable fuels for the future, Circularity and End-of-Life Vehicle (ELV) management were the focus areas of the event.

Eminent Experts as Panelist at SIAM SAFE Technical Conference at Bengaluru 2024

The technical conference concluded on a high note, fostering a collaborative exchange of ideas, best practices, and strategies between government officials and industry experts, strengthening India's commitment to safer and more sustainable mobility.

NATIONAL ROAD SAFETY MONTH 2025

National Road Safety Month 2025 was observed from January 1 to 31, with SIAM playing a key role through its "सुरक्षित सफर" (Safe Journey) Pavilion at BMGE 2025. The pavilion showcased the 4Es of road safety - Education, Engineering, Enforcement, and Emergency Care - via interactive tools like driving simulators, VR modules, CPR training, and Bharat NCAP demos.

Recognized by the Ministry of Road Transport & Highways (MoRTH) for its efforts, SIAM was entrusted with leading the month-long initiative, which aimed to reduce road fatalities by 50% by 2030 and foster public engagement in safe driving practices.

Indian automakers showcased global safety standards at the pavilion by equipping vehicles with ABS, airbags, and BNCAP compliance, alongside running awareness programs such as driver refresher training, eye check-ups, helmet distribution, and IDTRs.

To deepen public involvement, SIAM's SAFE initiative hosted creative activities like street plays, painting contests, Safety Qawwali, and traffic official workshops, drawing participation from 2,500+ students across 20 schools in Delhi-NCR. Sixteen schools were awarded for their outstanding contributions.

ROAD SAFETY EDUCATION & AWARENESS PROGRAMME

SIAM, under its "सुरक्षित सफर" (Safe Journey) initiative, is promoting road safety through a dedicated Road Safety Education & Awareness Program for school students. Targeting 1,250 Kendriya Vidyalayas and over 1.5 million students, the program aims to instil safe road habits from an early age.

Launched in partnership with the Ministries of Road Transport & Highways and Education, the initiative was formalized through an MoU with Kendriya Vidyalaya Sangathan (KVS) and inaugurated in the presence of Hon'ble Minister Shri Nitin Gadkari, highlighting the government's commitment to building a road safety culture among youth.

SIAM KVS Road Safety Education & Awareness Programme

SIAM in collaboration with Kendriya Vidyalaya Sangathan (KVS) and under the guidance of the Ministries of Road Transport & Highways and Education, launched the SIAM-KVS Road Safety Online Education Program on 22 April 2025 at Kendriya Vidyalaya No. 2, New Delhi.

The event was inaugurated by Union Ministers Shri Nitin Gadkari and Shri Dharmendra Pradhan, along with senior government and SIAM officials.

As part of its Student Road Safety Awareness Program, six educational modules are to be developed tailored for different school levels - Preparatory, Middle, and Senior Secondary. These cover Basic Road Safety, Pedestrian Awareness, Seatbelt & Helmet Usage, Road Rules, Safe Travel Practices, and Legal Aspects - laying the foundation for safer, more responsible mobility among India's youth.

To ensure the effectiveness of this approach, a pilot project was conducted at Kendriya Vidyalaya, R.K. Puram, New Delhi, on October 22, 2024.

The pilot sessions received an overwhelming response from educators and learners alike, reaffirming the need for structured road safety learning at the school level. Based on this encouraging feedback, SIAM developed a web-based Learning Management System (LMS) to seamlessly integrate these modules into KVS academic activities across 1,253 Kendriya Vidyalayas. This digital platform will enable structured, interactive, and accessible road safety sessions across schools.

This initiative is part of SIAM's 'सुरक्षित सफर (Safe Journey) campaign and aligns with India's vision of Viksit Bharat 2047, aiming to cultivate responsible road behavior among more than 15 lakh school students.

Coordinator's Training Program Across Kvs

On March 24, 2025, SIAM conducted a virtual meeting and training session with the Assistant Commissioners of Kendriya Vidyalaya Sangathan (KVS) Regional Offices to facilitate the implementation of the Road Safety Awareness Program across KVS regions.

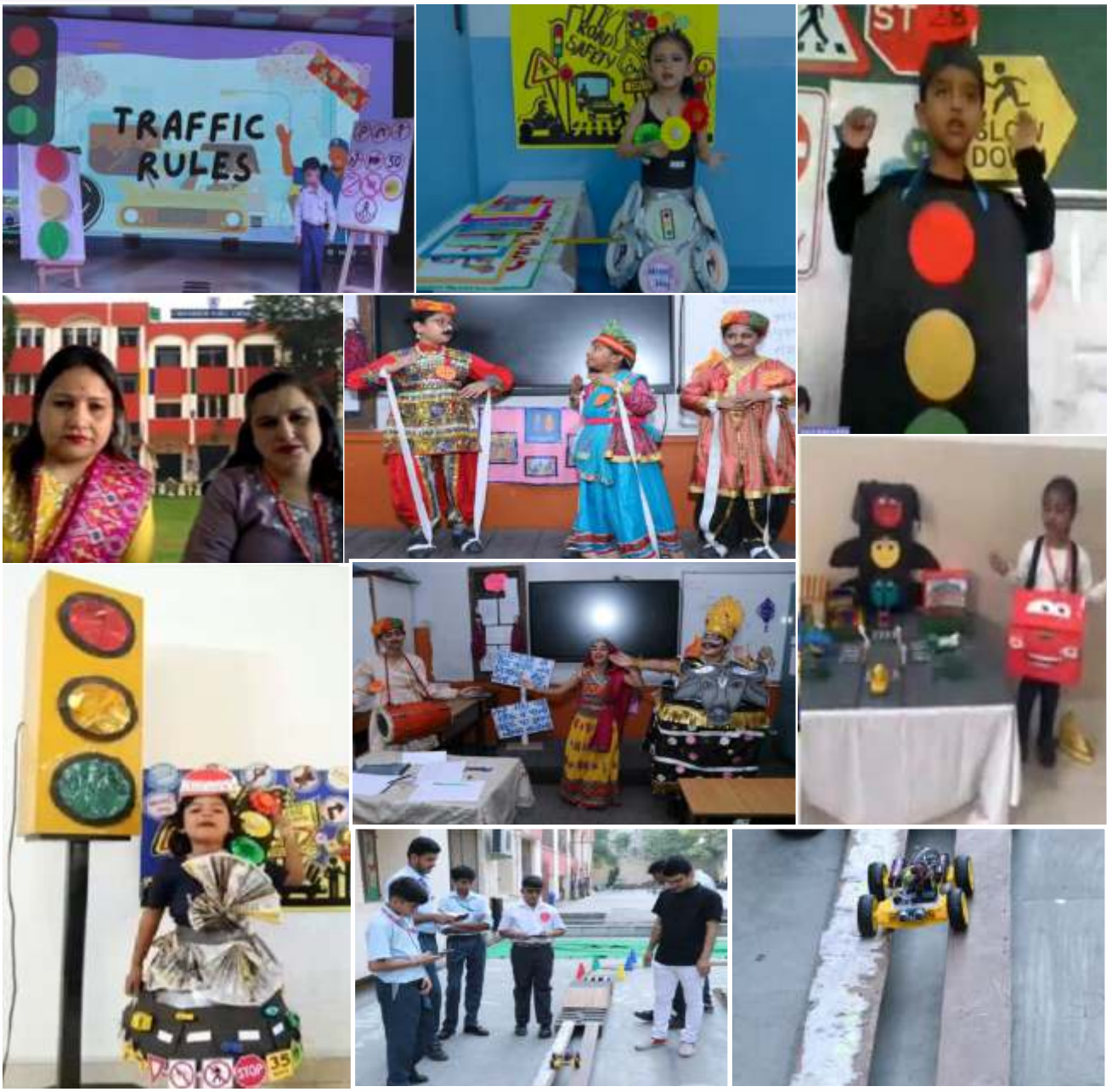
The session focused on developing a structured roadmap for rolling out the program in Kendriya Vidyalayas, including teacher training for conducting both online and offline road safety sessions. Key discussions centered on sensitizing students and raising awareness about various aspects of road safety.

During the session, SIAM also demonstrated its newly developed learning modules, reinforcing its commitment to fostering a culture of safe mobility from an early age.

SAFE Mobility Project

Under its 'सुरक्षित सफर (Safe Journey)' Road Safety Initiative, SIAM organized the 10th Inter-School Road Safety Competition from October 25-28, 2024, at Gyan Mandir Public School, New Delhi, in collaboration with Yamaha Motor India, Rosmerta Technologies, Volkswagen Skoda, and the host school. The event engaged over 1,500 students from 52 schools in 23 creative competitions such as E-Poster Making, Jingle Creation, Short Film Making, and Presentations on Road Safety.

Aimed at instilling lifelong safe mobility habits, the initiative provided a vibrant platform for students to creatively engage with road safety themes, reinforcing SIAM's mission of promoting Safe Mobility and nurturing a generation of responsible road users.



The SAFAR Summit, themed "United Efforts for Road Safety: Safer Roads, Our Responsibility," was held on January 19, 2025, at Bharat Mandapam in New Delhi alongside the Bharat Mobility Global Expo. It brought together policymakers, automotive leaders, enforcement agencies, and civil society to foster multi-sector collaboration across the 5E framework-Education, Enforcement, Engineering, Emergency care, and Evaluation-to combat road-related injuries and fatalities. The opening session, under the banner "Driving a People Centric Future," featured the launch of the सुरक्षित सफर - Safe Journey Initiative Report (2025-26) by Mr. V Umashankar, Secretary of MoRTH, and emphasized SIAM's focus on protecting two-wheeler users, who make up 80% of India's vehicle population. Leaders such as Mr. Umashankar advocated the RVB model (Road, Vehicle, Behaviour); Mr Sanjay Bandopadhyaya urged a revival of cultural road courtesy and stressed vehicle tech, enforcement, and emergency care; and Mr. Shailesh Chandra highlighted the 4E model, data analytics, and collaboration. Industry voices like Mr. Piyush Arora welcomed the Bharat NCAP safety initiative, and Mr. Kazuyoshi Kuroki

shared insights from Japan's road safety : public-private approach.

The 3rd edition of the सुरक्षित सफर (Safe Journey) Pavilion, organized by SIAM as part of the Bharat Mobility Global Expo 2025, was held from January 17th to 22nd at Bharat Mandapam, New Delhi. The event aimed to raise awareness and promote road safety in India through a comprehensive and engaging platform. Centered around the theme "Safer Roads, Our Responsibility," the Pavilion was designed around the 5Es of road safety: Education, Engineering, Enforcement, Emergency Care and Evaluation. Each zone featured immersive and interactive exhibits, including VR simulations, driving simulators, vehicle safety demos, enforcement technologies, and emergency response displays. The central hub, Safety Chowk, served as a symbolic intersection of all safety themes, featuring powerful installations like "Don't Drink and Drive" and road safety videos.

Hon'ble Minister MoRTH with other eminent dignitaries at SIAM सुरक्षित सफर-Safe Journey Pavilion

A range of new initiatives was introduced, including the SAFAR Summit for policy and industry collaboration, the launch of the SIAM mascot "Safe I Am" to educate children, and showcases such as the BAJA and Supra cars, BNCAP safety ratings, and the 2-wheeler ambulance for quicker emergency response. The Pavilion also included creative public engagement efforts such as daily street plays, painting and extempore competitions, a road safety run, CPR training sessions, and hands-on experiences like the Seat Belt Convincer Honda's riding track, Rosmerta driving test track. The entire space was designed to resemble roads with road signs, milestones, and traffic markers, making it both educational and visually immersive.

Inaugurated by Shri Nitin Gadkari, the Union Minister for Road Transport and Highways, the event attracted visitors and received high praise from government dignitaries. A "Road Safety Awareness Run" involving over 1,200 students was organised.

With the active participation of school students, industry leaders, and law enforcement agencies, the Pavilion successfully fostered a culture of road safety awareness and responsibility. Through technology, creativity, and collaboration, SIAM's initiative continues to make a meaningful impact toward creating safer roads across the country.

AUTO INDUSTRY ACTIVITIES UNDER SAFE

During National Road Safety Month 2025 (January 1-31), SAFE members, in collaboration with SIAM and key road safety stakeholders, led a wide range of initiatives across 20 states, reaching approximately 1.9 lakh people. Their holistic approach addressed road safety through engineering solutions, enforcement, public education, safety evaluations, and emergency response.

Key activities included driver education and eye care camps, vision and hearing check-ups at BMGE 2025, FM radio campaigns in Indore and Bhopal, employee engagement sessions, traffic kit distributions, and road safety films for NGOs.

SAFE also promoted road safety at customer touchpoints, using dealerships as platforms for interactive awareness on seat belt and helmet use. Emergency care programs featured CPR training, Good Samaritan education, and a Delhi Traffic Police mobile exhibition van. Demonstrations of two-wheeler ambulances showcased their effectiveness in reaching accident victims quickly, especially in congested areas.

These efforts reflect SAFE's strong commitment to advancing safer and more sustainable mobility across India through proactive community engagement and advocacy.

4th Global Ministerial Conference on Road Safety

India was part of the 4th Global Ministerial Conference on Road Safety held in Marrakech, Morocco from February 18-20, 2025. The Indian delegation, led by Hon'ble Minister of State for Road Transport and Highways Ajay Tamta, joined nearly 2,000 delegates and over 100 ministers to endorse the Marrakech Declaration for Global Road Safety, committing to halve road fatalities by 2030. India's participation underscored its growing engagement in global road safety efforts, providing a platform to align domestic strategies-like its Zero Fatality Corridor initiative-with international best practices in speed management, data-driven policymaking, and safer mobility for vulnerable road users.

4th Global Ministerial Conference on Road Safety in Marrakech and with Indian participants showcasing innovative road safety solutions

Engagement with Delhi Traffic Police

Since 2001, SAFE, in collaboration with the Delhi Traffic Police, has been actively conducting Road Safety Awareness Programs to promote responsible road behaviour among students, teachers, drivers, and parents. In February 2025, around 500 students participated in various educational activities and competitions aimed at enhancing road safety awareness.

A Prize Distribution and Commemorative Function was held on February 16, 2025, at India Gate, Kartavya Path, where outstanding participants were recognized with trophies, certificates, and cash prizes. The event was graced by Delhi's Lieutenant Governor Mr. Vinay Kumar Saxena and Police Commissioner Mr. Sanjay Arora, with Mrs. Meenakshi Kukreja, Director, SIAM, being honoured for SIAM-SAFE's contributions to road safety. The top award, including a cash prize of ₹ 21,000, went to Atal Adarsh Vidyalaya, followed by Mahavir Senior Model School and The Samarth School. The initiative reflects SIAM-SAFE's sustained commitment to nurturing road safety awareness and responsible mobility practices.

WORLD ENVIRONMENT DAY: 5th JUNE 2025

5th INTERNATIONAL CONFERENCE ON WORLD ENVIRONMENT DAY 2025

SIAM organised the 5th edition of its international conference on World Environment Day on 5th June 2025 in New Delhi. Held under the theme "Revolutionizing Mobility: Shaping the Automotive Industry for a Sustainable and Circular Future," the event brought together policymakers, industry leaders, and global experts to deliberate on environmental challenges and opportunities within the automotive sector.

The conference featured a street play performed by Gyan Mandir Public School students, shedding light on plastic pollution and encouraging awareness. A painting competition titled "Nature's Palette" was also organized, and nine students from various schools in Delhi NCR were awarded prizes for their contributions.

Mr P K Banerjee, ED, SIAM; Mr Sanjay Mehta, President, MRAI; Mr Kenneth Nobrega, Ambassador of Brazil to India; Dr Hanif Qureshi, Addl. Secretary, MHI; Mr Abhay Bakre, Director, National Green Hydrogen Mission; Mr Shailesh Chandra, President, SIAM; Mr Rajesh Menon, DG, SIAM

There were four thematic sessions focusing on waste management, plastic reduction, recycling technologies, and battery and e-waste management - all aligned with India's sustainability goals and the principles of a circular economy.

Prominent figures such as Shailesh Chandra, President of SIAM and Managing Director of Tata Motors Passenger Vehicles & Tata Passenger Electric Mobility, Guest of Honour Kenneth Nóbrega, Ambassador of Brazil to India, and senior Indian officials including Dr Hanif Qureshi, Additional Secretary at the Ministry of Heavy Industries, and Abhay Bakre, Director of the National Green Hydrogen Mission contributed to the discourse, highlighting progress in ethanol blending, hydrogen mobility, and regulatory frameworks.

The sessions explored global best practices and innovations in materials and recycling, emphasizing the industry's role in reducing its environmental footprint. SIAM reaffirmed its commitment to India's 2070 carbon neutrality target through actions like electrification, green hydrogen, and sustainable mobility solutions, aligning with the national goal of achieving Viksit Bharat by 2047.

To mark World Environment Day, SIAM members organized a series of complimentary PUC (Pollution Under Control) drives and various environment-awareness campaigns at their premises, service stations, and dealer networks to promote environmental protection. Additionally, SIAM launched a coordinated social media campaign focused on conserving the environment in observance of the day.

INTERNATIONAL COOPERATION - SIAM JAMA

SIAM JAMA Tech regulation meeting

Members of SIAM and JAMA (Japanese Automobile Manufacturers Association Inc.) continued their collaboration through regular exchanges on key topics such as vehicle safety, emission regulations, and emerging mega technology trends. The annual SIAM-JAMA Meeting, held in October 2024 in Maharashtra, India, witnessed participation from over 100 industry leaders and experts from both countries. The discussions were held in the presence of the President of SIAM and the Executive Vice President of JAMA, further reinforcing the strong partnership and shared commitment of the two associations towards advancing automotive excellence and regulatory alignment.

At the global level, SIAM maintained its robust participation with international bodies such as OICA (Organisation Internationale des Constructeurs d'Automobiles) and IMMA (International Motorcycle Manufacturers Association), contributing to important dialogues on the harmonisation of vehicle regulations and global standards.

India and Japan Industry Leaders and Experts at SIAM JAMA Meetings, Lonavala, India

SIAM JAMA Members at Emission Meeting, India 2

SIAM SPEAKS

A total of 23 episodes in the past 1 year, including 10 international speakers, 12 member OEMs 1 expert from a government body. During 2024-25, SIAM Speaks gradually evolved with the type of topics discussed from Member OEM perspectives on various topics of sustainability to wisdom of global experts who have been successfully driving the sustainability programs in their respective countries. Some of the topics discussed are Decarbonizing Medium and (Heavy Commercial Vehicles (M&HCV):

- The Role of EVs and Hydrogen
- Decarbonizing Passenger Vehicles with CNG and Hybrid Technologies
- The Multi-Powertrain Future of Commercial Vehicles
- Decarbonizing Three-Wheelers: EVs and CNG Lead the Way
- From India to the World: The EV Manufacturing Journey Begins
- The Shift to Electric - Exploring Hybrids, Luxury EVs, and Solutions
- Revolutionizing India's Commercial Transport through Alternative Fuels
- Collaborations Fuelling India's EV Future
- Beyond Diesel: The New Age of Commercial Vehicles
- Technologies Shaping the Future of Passenger Vehicle Electrification
- NITI Aayog's Role in India's EV Revolution
- The Future of India's Two-Wheelers with Flex Fuel and Evs
- Evaluating BNCAP and the Future of Road Safety in India
- Sustainable Automotive Design and the Path to Circular Vehicles
- Advancing EV Growth in India Through Global Collaboration
- Strategizing Flex Fuel Adoption and Decarbonization Pathways
- Decarbonizing Commercial Transport with Hydrogen and Evs
- Best Practices for for End-of-Life Vehicle Recycling
- Driving India's EV Revolution with Global Best Practices
- Driving India's EV adoption with insights and data intelligence

The episodes were published every alternate Thursday and promoted on SIAM's LinkedIn handles. The platform has provided an opportunity to the leading members of the industry to disseminate their views on topics of significant relevance for the industry.

Some key production quality improvements that were done in the episodes. Consistent recording studio format with professional lighting and recording equipment. Engaging and consistency in video editing and video structure

SIAM COUNCIL & GROUPS 2024-25

A. COUNCIL ON INTERNATIONAL BUSINESS

Chairman: Mr Unsoo Kim
Managing Director
Hyundai Motor India Ltd

1. INTERNATIONAL RELATIONS & TRADE POLICY GROUP

Chairman: Mr Rahul Bharti
Sr. Executive Director,
Corporate Planning & Govt. Affairs,
Maruti Suzuki India Ltd

Co-Chairman: Mr Sachin Arolkar
Head, International Operations,
Mahindra & Mahindra Ltd

Co-Chairman:
Mr Bhagwan K Bindiganavile
Executive Vice President
Strategic Planning,
VE Commercial Vehicles Ltd

2. EXPORTS GROUP

Chairman: Mr Rakesh Sharma
Executive Director,
Bajaj Auto Ltd

Co-Chairman: Mr Asif Shamim
Sr. General Manager-International
Business, Tata Motors Ltd

Co-Chairman: Mr Yash Pal Sachar
Vice President (Corporate Affairs),
Ashok Leyland Ltd

B. COUNCIL ON MARKET

1.VEHICLE CLASSIFICATION, SALES REPORTING & ANALYSIS GROUP

Chairman: Mr Rajesh Kaul
Vice President & Business
Head -Trucks, Tata Motors Ltd

Co-Chairman: Mr. Narender Kukreti
General Manager – External
Affairs & Public Affairs,
Toyota Kirloskar Motor Pvt Ltd

2. LOGISTICS GROUP

Chairman: Mr Tapan Ghosh
Vice President - Sales,
Hyundai Motor India Ltd

Co-Chairman: Mr S D Chhabra
Executive Officer – Parts,
Accessories & Logistics,
Maruti Suzuki India Ltd

3 .CSR & COMMUNITY SERVICES GROUP

Chairman: Mr Puneet Anand
Associate Vice President
& Vertical Head,
Hyundai Motor India Ltd

Co-Chairman:
Mr Satyaprakash Patil
Operating Officer- Human
Resources and Admin, Honda India
Foundation, Honda Motorcycle &
Scooter India Pvt Ltd

Co-Chairman: Mr Rajendra Raut
Director, Corporate and
Government Affairs,
JSW MG Motor India Pvt Ltd

4. QUALITY COMPLIANCE, SERVICE, I&M AND CERTIFICATION GROUP

Chairman:
Mr Shriniwas P Chakravarty
Head of Quality Management,
Skoda Auto Volkswagen India Pvt. Ltd

Co-Chairman:
Mr Sanjay Subhash Shejwal
National Head-Consumer
Experience & Service Plan
Hero MotoCorp Ltd

Co-Chairman: Mr Anil K Dhingra
Head – After Markets,
Ashok Leyland Ltd

5. GAS BASED MOBILITY GROUP (CNG & LNG)

Chairman: Mr Ashish Chutani
Head – Government & Policy Affairs,
Maruti Suzuki India Ltd

Co-Chairman: Mr D Balakrishnan
Vice President, Product Development
Ashok Leyland Ltd

Co-Chairman: Mr Rajesh Khanna
Head – Product
Strategy & Planning - Trucks
Tata Motors Ltd

6. TRADE FAIR GROUP

Chairman: Mr B Srinivas
Chief Operating Officer
VE Commercial Vehicles Ltd

C. COUNCIL ON ECONOMIC AFFAIRS

1. AATMANIRBHAR BHARAT GROUP/SOURCING

Chairman: Mr. Sunil Kakkar
Whole Time Director &
Executive Committee Member
Maruti Suzuki India Ltd

Co-Chairman: Mr. Veeraraghavan R
Senior Vice President - Strategic Sourcing,
Mahindra & Mahindra Ltd

Co-Chairman: Mr. Sachin Kulkarni
Executive Director – Corporate Procurement & Member of the Board,
Skoda Auto Volkswagen India Pvt Ltd

Co-Chairman: Mr. Badrish Sinha
Sr. Vice President-Purchasing,
VE Commercial Vehicles Ltd

2. ECONOMIC RESEARCH GROUP

Chairman: Mr Vikram Gulati
Country Head & EVP – Corporate Affairs & Governance,
Toyota Kirloskar Motor Pvt Ltd

Co-Chairman: Mr A Rajkumar
Senior Vice President,
Business Planning
TVS Motor Company Ltd

3. TAXATION POLICY GROUP

Chairman: Mr. Rajesh Shukla
Head – Indirect Taxation,
Tata Motors Ltd

Co-Chairman: Mr Veeresh Prasad
General Manager (Indirect Taxation & Impex)
Toyota Kirloskar Motor Pvt Ltd

4. TAXATION PROCEDURAL & EODB-TAX GROUP

Chairman: Mr Rajeev Goyal
Chief Financial Officer – Auto & Farm Sector
Mahindra & Mahindra Ltd

Co-Chairman: Mr Anil Sahani
Vice President (Finance) Head-Tax,
Maruti Suzuki India Ltd

5. DIRECT TAX GROUP

Chairman: Mr. Sanjeev Agarwal
Head –Taxation & Customs,
BMW India Pvt. Ltd

Co-Chairman: Mr Sanjay Seth
Head - Taxation,
Hero Moto Corp Ltd

6. FINANCE, LEASING & INSURANCE GROUP

Chairman: Mr G. Parthasarathy
Head- Finance,
TVS Motor Company Ltd

7. HUMAN CAPITAL GROUP

Chairman: Mr Charles JS Walter,
Group Head-HR,
Hyundai Motor India Ltd

Co-Chairperson: Ms Sneha Oberoi,
CFO & EO (Admin),
Suzuki Motorcycle India Ltd

8. SKILLING GROUP

Chairman: Mr Piyush Arora
Managing Director & CEO,
Skoda Auto Volkswagen India Pvt Ltd

Co-Chairman: Mr Hardeep S Brar
Vice President – Sales & Marketing,
Kia India Pvt Ltd

Co-Chairman: Mr Prabhu Nagraj
Operating Head – Corporate Affairs,
Honda Motorcycle & Scooter
India Pvt Ltd

9. AFTER MARKET PARTS GROUP

Chairman: Mr R Ramesh
Executive Vice President – Customer
Service, & Network Development,
VE Commercial Vehicles Ltd

Co-Chairman: Mr Pankaj Tiwari
Vice President-Parts,
Maruti Suzuki India Ltd

D. TECHNICAL COUNCIL

Chairman: Dr N Saravanan
President & Chief Technology Officer,
Ashok Leyland Ltd

1. E-MOBILITY GROUP

Chairman: Mr Sushant Naik
Global Head,
Government & Public Affairs,
Tata Motors Ltd

Co-Chairperson: Ms Suman Mishra
Managing Director & CEO,
Mahindra Last Mile Mobility Ltd

Co-Chairman: Mr Manu Saxena
Executive Vice President - Global
Product Planning & Design Group,
TVS Motor Company Ltd

Co-Chairman: Mr Vipin Surana
Business Head – Electromobility
VE Commercials Vehicles Ltd

2. RECYCLING AND MATERIAL GROUP

Chairman: Mr M S Anandkumar
AVP & Head - Regulatory affairs,
Certification & Materials –R&D
TVS Motor Company Ltd

Co-Chairman: Mr Prabhakar Tiwari
General Manager-Strategy &
Business Transformation (CV),
Tata Motors Ltd

Co-Chairperson: Ms Kiran Sarkar
Head – Sustainability, Mahindra
(Auto and Farm Sector)
Mahindra & Mahindra Ltd

3. SUSTAINABLE MOBILITY GROUP

Chairman: Mr Rajendra M Petkar
President and CTO,
Tata Motors Ltd

Co-Chairperson: Ms Pamela Tikku
Vice President – Auto,
Group Public Affairs
Mahindra & Mahindra Ltd

Co-Chairman:
Mr Srinivasa Raghavan
CTO
Cummins Technologies Pvt Ltd

4. CONNECTED VEHICLES GROUP

Chairman: Dr Venkat Srinivas
Executive Director & CEO - SML Isuzu and Business Head - Mahindra Truck

Co-Chairman: Mr Sameer Jindal
Director,
JSW MG Motor India Pvt Ltd

Co-Chairman: Mr Bharat Bhushan
Sr. General Manager-CV-Digital,
Tata Motors Ltd

5. STYLING & DESIGN GROUP

Chairman: Mr. G Sathiyaseelan
Vice President – Styling & Product Development,
Ashok Leyland Ltd

Co-Chairman: Mr Nilesh Kirtane
General Manger-
Market analysis & Creation
Honda Motorcycle & Scooter India Pvt Ltd

6. FRONTIER TECHNOLOGY & INNOVATIONS GROUP

Chairman: Mr Sachin Agrawal
Executive Vice President &
Head – Product Development,
VE Commercial Vehicles Ltd

Co - Chairman: Mr Milind Pagare
Vice President (R&D),
Bajaj Auto Ltd

Co-Chairman: Mr Alok Verma
Head – Corporate Strategy, ESG & Planning
Ashok Leyland Ltd

7. MANUFACTURING, INDUSTRY 4.0 AND EODB-MFG

Chairman: Mr Satyakam Arya
CEO & Managing Director,
Daimler India Commercial Vehicles Ltd

Co-Chairman:
Mr Nalinikanth Gollagunta
CEO-Auto,
Mahindra & Mahindra Ltd

8. DIGITAL TRANSFORMATION AND INNOVATION GROUP

Chairman: Dr Tapan Sahoo
Executive Officer – Digital Enterprise, Information & Cybersecurity
Maruti Suzuki India Ltd

F. NATIONAL & INTERNATIONAL REGULATIONS COUNCIL

Chairman: Mr R S Sachdeva
Deputy Chief Executive Officer &
Chief Transformation Officer,
VE Commercial Vehicles Ltd

1. EMISSIONS & CONSERVATION GROUP

Chairman: Mr C V Raman
Member-Executive Committee
Maruti Suzuki India Ltd

Co-Chairman: Mr S Sakthivelan,
Head - Program Management,
Homologation CoE, Mahindra Vehicle
Development Center (MVDC),
Mahindra & Mahindra Ltd

Co-Chairman:
Mr Aniruddha Kulkarni,
Vice President & Head-Engineering (CV),
Tata Motors Ltd

2. CMVR & SAFETY REGULATIONS GROUP

Chairman: Mr R Velusamy
President- Automotive Business,
Mahindra & Mahindra Ltd

3. TWO WHEELERS GROUP

Chairman: Mr Harjeet Singh
Senior Technical Advisor
Hero Moto Corp Ltd

Co-Chairman: Mr Suraj Agarwal
Operating Officer
Honda Motorcycle and Scooter
India Pvt Ltd

4. THREE WHEELERS GROUP

Chairman: Mr V Pattabiraman
Vice President, NPD Adv 3W,
TVS Motor Company Ltd

Co-Chairman: Mr Arvind Kumbhar
Divisional Manager (R&D),
Bajaj Auto Ltd

5. INTERNATIONAL HARMONIZATION GROUP

Chairman: Mr Anil Kumar C
Sr. General Manager- PV
Engineering, TMPVL,
Tata Motors Ltd

Co-Chairman:
Mr N Balasubramanian
Vice President,
Renault Nissan Technology &
Business Centre India

Co-Chairman: Mr Prakash Rao
Head–Product Development:
Powertrain, COEs & Facilities
Mahindra & Mahindra Ltd

G. COMMERCIAL VEHICLES CEOs COUNCIL

Chairman: Mr Girish Wagh
Executive Director – CVBU,
Tata Motors Ltd

H. THREE WHEELERS CEOs COUNCIL

Chairman: Mr Diego Graffi
Chairman & Managing Director,
Piaggio Vehicles Pvt. Ltd

I. TWO WHEELERS CEOs COUNCIL

Chairman: Mr K N Radhakrishnan
Director & CEO,
TVS Motor Company Ltd

J. PASSENGER VEHICLE CEOs COUNCIL

Chairman: Mr Veejay Ram Nakra
President - Automotive Division,
Mahindra & Mahindra Ltd

K. PASSENGER VEHICLE CEOs COUNCIL SUB-GROUP ON "LOW VOLUME HIGH VALUE VEHICLES"

Chairman: Mr Vikram Pawah
President,
BMW India Pvt Ltd

L. SAFE – SOCIETY FOR AUTOMOTIVE FITNESS & ENVIRONMENT

President: Mr Sushant Naik
Global Head,
Government & Public Affairs,
Tata Motors Ltd

Vice President: Mr Alok Jaitley
Executive Vice President (Engineering),
Head-Homologation Vertical,
Maruti Suzuki India Ltd

SIAM EXECUTIVE COMMITTEE 2024-25

COMPANY	MEMBER	ALTERNATE MEMBER
Ashok Leyland Ltd	Mr Shenu Agarwal	Dr N Saravanan
Bajaj Auto Ltd	Mr Rakesh Sharma	Mr Eric Vas
BMW India Pvt Ltd	Mr Vikram Pawah	Mr Vinod Pandey
Cummins India Ltd	Mr Nitin Jirafe(Co-opted)	Mr Ashish Aggarwal
Daimler India Commercial Vehicles Pvt. Ltd	Mr Satyakam Arya	Mr Alexander Schoen
Force Motors Ltd	Mr Prasan Firodia	Mr Pankaj Gupta
Hero MotoCorp Ltd	Mr Vikram Kasbekar	
Honda Cars India Ltd	Mr Takashi Nakajima	Mr Udit Kumar
Honda Motorcycle & Scooter India Pvt Ltd	Mr Tsutsumu Otani	Mr Vinay Dhingra
Hyundai Motor India Ltd	Mr Unsoo Kim	Mr Puneet Anand
India Yamaha Motor Pvt Ltd	Mr Itaru Otani (Co-opted)	Mr Ravinder Singh
JSW MG Motor India Pvt Ltd	Mr Anurag Mehrotra	Mr Yash Yadav
Kia India Private Limited	Mr Gwanggu Lee	Mr Hardeep Brar
Mahindra & Mahindra Ltd	Mr Velusamy R	Ms Abanti Sankaranarayanan
Maruti Suzuki India Ltd	Mr Hisashi Takeuchi	Mr Rahul Bharti
Mercedes-Benz India Pvt Ltd	Mr Santosh Iyer	Dr Shyam Sunder
Piaggio Vehicles Private Limited	Mr Diego Graffi	Mr Anand Bhangaonkar
Simpson & Co. Ltd	Mr P S Rajamani	Mr Balavijayan Nagarajan
SKODA AUTO Volkswagen India Private Ltd	Mr Piyush Arora	Ms Deepti Singh
Tata Motors Passenger Vehicles Ltd and Tata Passenger Electric Mobility Ltd.	Mr Shailesh Chandra	Mr Sushant Naik
Toyota Kirloskar Motor Pvt Ltd	Mr Masakazu Yoshimura	Mr Vikram Gulati
TVS Motor Company Ltd	Mr K N Radhakrishnan	Mr M S Anandkumar
VE Commercial Vehicles Limited	Mr Vinod Aggarwal	Mr Bhagwan K Bindiganavile

PAST PRESIDENTS

YEAR	NAME	COMPANY
1960	Mr Lalchand Hirachand*	Premier Automobiles Ltd
1961	Sir L P Misra*	Hindustan Motors Ltd
1962 & 1963	Mr A E L Collins*	Ashok Leyland Ltd
1964	Mr Keshub Mahindra*	Mahindra & Mahindra Ltd
1965 & 1966	Dr M A Chidambaram*	Automobile Products of India Ltd
1967 & 1968	Mr K V Srinivasan*	Standard Motor Products India Ltd
1969	Mr A H Tobaccowala*	TELCO Ltd
1970 & 1971	Mr A Sivasailam*	Simpson & Co. Ltd
1972 & 1973	Mr N K Firodia*	Bajaj Tempo Ltd
1974 & 1975	Mr J E Talaulicar*	TELCO Ltd
1976 & 1977	Mr Rahul Bajaj*	Bajaj Auto Ltd
1978 & 1979	Mr P N Venkatesan*	Premier Automobiles Ltd
1980 & 1981	Mr C V Karthik Narayanan*	Standard Motor Product India Ltd
1982 & 1983	Mr R J Shahaney*	Ashok Leyland Ltd
1984 & 1985	Dr V Krishnamurthy*	Maruti Udyog Ltd
1986 & 1987	Mr S L Bhatter*	Hindustan Motors Ltd
1988/89 & 1989/90	Mr B De Souza*	Mahindra & Mahindra Ltd
1990/91 & 1991/92	Dr Abhay Firodia	Bajaj Tempo Ltd
1992-1993	Mr Subodh Bhargava	Eicher Motors Ltd
1993/94 & 1994/95	Mr Vinod L Doshi*	Premier Automobiles Ltd
1995/96 & 1996/97	Dr Brijmohan Lall*	Hero MotoCorp Ltd
1997/98 & 1998/99	Mr V M Raval*	TELCO Ltd
1999/00 & 2000/01	Mr Venu Srinivasan	TVS Motor Company Ltd
2001/02 & 2002/03	Mr R Seshasayee	Ashok Leyland Ltd
2003/04 & 2004/05	Mr Jagdish Khattar*	Maruti Udyog Ltd
2005/06 & 2006/07	Mr Madhur Bajaj*	Bajaj Auto Ltd
2007/08 & 2008/09	Mr Ravi Kant	Tata Motors Ltd
2009/10 & 2010/11	Dr Pawan Goenka	Mahindra & Mahindra Ltd
2011/12 & 2012/13	Mr S Sandilya	Royal Enfield (Unit Eicher Motors)
2013/14 & 2014/15	Mr Vikram Kirloskar*	Toyota Kirloskar Motors Ltd
2015/16 & 2016/17	Mr Vinod K Dasari	Ashok Leyland Ltd
2017/18	Dr Abhay Firodia	Force Motors Ltd
2018 /19 & 2019/20	Mr Rajan Wadhera	Mahindra & Mahindra Ltd
2020/21 & 2021/22	Mr Kenichi Ayukawa	Maruti Suzuki India Ltd
2022/23 & 2023 /24	Mr Vinod Aggarwal	Volvo Eicher Commercial Vehicles
2024/25	Mr Shailesh Chandra	Tata Motors Ltd

** Since deceased*

Note: The names of the Companies are as they were known then.

SIAM MEMBERS

ASHOK LEYLAND	ATHER ENERGY	ATUL AUTO	BAJAJ AUTO	BMW INDIA	CONTINENTAL ENGINES
CUMMINS INDIA	DAIMLER INDIA COMMERCIAL VEHICLES	FIAT INDIA AUTOMOBILES	FORCE MOTORS	FOTON MOTORS MANUFACTURING INDIA	GREAVES COTTON
HERO MOTOCORP	HONDA CARS INDIA	HONDA MOTORCYCLE & SCOOTER INDIA	HYUNDAI MOTOR INDIA	INDIA KAWASAKI MOTORS	INDIA YAMAHA MOTOR
ISUZU MOTORS INDIA	JAGUAR LAND ROVER INDIA	JBM AUTO	JSW MG Motor India	KIA INDIA	MAHINDRA & MAHINDRA
MARUTI SUZUKI INDIA	MERCEDES - BENZ INDIA	NISSAN MOTOR INDIA	OKINAWA AUTOTECH	OLECTRA GREENTECH	PIAGGIO VEHICLES
PINNACLE MOBILITY SOLUTIONS	PMI ELECTRO MOBILITY SOLUTIONS	RENAULT INDIA	ROYAL ENFIELD (A UNIT OF EICHER MOTORS)	SCANIA COMMERCIAL VEHICLES INDIA	SIMPSON & CO.
SKODA AUTO VOLKSWAGEN INDIA	STELLANTIS	SML ISUZU	SUZUKI MOTORCYCLE INDIA	SWITCH MOBILITY AUTOMOTIVE	TATA MOTORS
TI CLEAN MOBILITY	TOYOTA KIRLOSKAR MOTOR	TRIUMPH MOTORCYCLES INDIA	TVS MOTOR COMPANY	VE COMMERCIAL VEHICLES	VOLVO AUTO INDIA

SIAM SECRETARIAT

1. Mr Akshat Verma
2. MrAmit Kumar
3. MrAmit Kumar
4. Ms Anjali Paswan
5. Ms Anushka Tamrakar
6. Mr Arindom Ghatak
7. Mr Arnab Chakraborti
8. Mr Atanu Ganguli
9. Mr Aditya Kumar
10. Ms Bhawna Mendiratta
11. Mr Bhisham Prasad Rai
12. Mr Dinesh Patnaik
13. Mr Jitendra Rai
14. Ms Kanishka Chana
15. Mr Kartike Karwal
16. Ms Manju Dhamija
17. Mr Manoj Das Mohapatra
18. Ms Meenakshi Kukreja
19. Mr Mohit Khandelwal
20. Ms Mukti Prasad
21. Mr P K Banerjee
22. Mr Philip Skaria
23. Ms Pooja Nagpal
24. Mr Rabinder Singh
25. Mr Rajesh Menon
26. Mr Raju Kamat
27. Dr Rashid Hasan
28. Mr Rohan Singh Rawat
29. Ms Ruby Ganguly
30. Ms Supriya Sinha
31. Mr Tribhuvan Ray
32. Mr V K Pandey

In alphabetical order

LINKAGE WITH OTHER INSTITUTIONS IN INDIA

- All India Motor Transport Congress (AIMTC)
- Alloy Steel Producers Association (ASPA)
- Aluminium Association of India (AAI)
- Association of State Road Transport Undertakings (ASRTU)
- Automotive Component Manufacturers Association of India (ACMA)
- Automotive Skills Development Council (ASDC)
- Automotive Tyre Manufacturers Association (ATMA)
- Bureau of Energy Efficiency (BEE)
- Bureau of Indian Standards (BIS)
- Central Institute of Road Transport (CIRT)
- Central Pollution Control Board (CPCB)
- Central Road Research Institute (CRRI)
- Confederation of Indian Industry (CII)
- Delhi Transport Corporation (DTC)
- Delhi Metro Rail Corporation (DMRC)
- Emission Controls Manufacturers Association
- Energy Transition Advisory Committee (ETAC)
- Federation of Automobile Dealers Association (FADA)
- Federation of India Petroleum Industry (FIPI)
- Global Automotive Research Centre (GARC)
- Indian Auto LPG Coalition
- Indian Diesel Engine Manufacturers Association (IDEMA)
- Indian Institute of Foreign Trade (IIFT)
- Indian Institute of Petroleum (IIP)
- Indian Institute of Technology (IIT)
- Indian Machine Tool Manufacturers Association (IMTMA)
- Indian Printed Circuit Association (IPCA)
- Indian Rubber Institute (IRI)
- Indian Steel Association (ISA)
- Insurance Regulatory and Development Authority of India (IRDAI)
- Institute of Road Traffic Education (IRTE)
- Indian Sugar & Bioenergy Manufacturers Association (ISMA)
- International Centre for Automotive Technology (ICAT)
- Kendriya Vidyalaya Sangathan (KVS)
- National Automotive Test Tracks (NATRAX)
- National Automotive Testing and R&D Infrastructure Project (NATRiP)
- National Council of Applied Economic Research (NCAER)
- National Green Hydrogen Mission (NGHM)
- National Institute of Design (NID)
- National Skill Development Corporation (NSDC)
- Material Recycling Association of India (MRAI)
- Petroleum Planning & Analysis Cell (PPAC)
- Research & Information Systems for Non-aligned and Other Developing Countries (RIS)
- Society for Automotive Fitness & Environment (SAFE)
- The Automotive Research Association of India (ARAI)
- The Energy and Resources Institute (TERI)
- Tractor Manufacturers Association (TMA)
- Vehicle Research & Development Establishment (VRDE)

In alphabetical order

OVERSEAS LINKAGES

- African Association of Automotive Manufacturers (AAAM)
- Asia Pacific Economic Cooperation Automotive Dialogue (APEC AD)
- Associação Nacional dos Fabricantes de Veículos Automotores (ANFAVEA)
- Auto Alliance, USA
- Automotive Research & Testing Centre, Taiwan
- Association of Indonesian Electric Motorcycle Manufacturers (AISMOLI)
- Bangladesh Automobiles Assemblers and Manufacturers Association (BAAMA), Bangladesh
- Bangladesh Motorcycle Assemblers and Manufacturers Association (BMAMA), Bangladesh
- Bangladesh Road Transport Authority (BRTA), Bangladesh
- Ceylon Motor Traders' Association (CMTA), Sri Lanka
- China Association of Automobile Manufacturers (CAAM), P R China
- Comité des Constructeurs Français d'Automobiles (CCFA), France
- European Automobile Manufacturers Association (ACEA), Europe
- European Association of Motorcycle Manufacturers (ACEM).
- Federal Chamber of Automotive Industry (FCAI), Australia
- Federation of Asia Motorcycle Industries (FAMI), Singapore
- Gulf Cooperation Council (GCC)
- Indonesian Automotive Industry Association (GAIKINDO), Indonesia
- Indonesian Motorcycle Industry Association (AISI), Indonesia
- International Motorcycle Manufacturers Association (IMMA)
- International Organization of Motor Vehicle Manufacturers (OICA)
- Japan Automobile Manufacturer Association (JAMA), Japan
- Japan Automobile Standards Internationalisation Centre (JASIC), Japan
- Korean Automobile Manufacturers Association (KAMA), South Korea
- Motorcycle and Scooter Assemblers and Distributors Association of Malaysia
- National Association of Automobile Manufacturers of South Africa (NAAMSA)
- National Highway Traffic & Safety Authority (NHTSA), USA
- Nepal Auto Dealers Association (NADA)
- Singapore Motorcycle Trade Association, Singapore
- Taiwan Transportation Vehicle Manufacturers Association, Taiwan
- The Society of Motor Manufacturers and Traders (SMMT), UK
- The Thai Automotive Industry Association (TAIA), Thailand
- The United Nations Economic Commission for Europe (UNECE)
- UK Trade & Investment (UKTI)
- US Grains Council (USGC)
- The Brazilian Sugarcane Industry Association (UNICA)
- Verband der Automobilindustrie e.v. (VDA), Germany

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TOWARDS SUSTAINABLE MOBILITY

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