

ANNUAL REPORT

2014
2015

SIAM

Society of Indian Automobile Manufacturers

SIAM

Society of Indian Automobile Manufacturers

ANNUAL REPORT 2014-15

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PRESIDENT'S MESSAGE



Executive Summary

Begins with last one year performance; followed by (mostly favourable) growth performance segment by segment. Expresses concern of below par performance in rural market mainly due to rain and still long way to go to achieve growth to the level achieved in March 2012. Highlights new developments in the area of air pollution activism that has potential to impact the industry. Thereafter, a brief on actions / updates of SIAM on various regulations – Emission, Fuel Efficiency, VAHAN database, safety regulations and how they are good for the consumers (despite increase cost). Thereafter, the launch of NEMMP is described as one of the key highlights of the year.

In economic front, brief explanation on wider acceptance of Fleet modernisation, concern of early GST implementation, SIAM efforts to tackle issues of climate change and road safety. This is followed by a short note on SIAM international engagements – IAA Commercial Show in Sept 2014, participation at OICA and IMMA.

Finally, remarks on how industry is looking ahead for the next decade with AMP 2016-26.

Performance & growth trends of the industry

The auto industry recovery process that began last year around the same time during our Annual Meeting of SIAM has continued its momentum since then. Looking at the positive growth trend, the Modi led Government discontinued the excise cuts on the auto industry effective from 1st January 2015.

The positive sentiments which were all pervasive during the year saw the industry make a sure but slow recovery aided by positive movements in the mining and infrastructure sectors. This can be seen with the industry performance, wherein

- The Passenger vehicles segment saw growth of 3.90% during FY 2014-15,
- Two Wheelers grew by 8.09%
- Three Wheelers grew by 10.80%
- The Heavy and Medium Commercial segment saw the smartest recovery clocking a growth of 16.02%.
- However the Commercial Vehicles had a negative growth of (-) 2.83 %
- Also, the light Commercial Vehicles did improve its performance but still remain in negative territory indicating the recovery process to remain very slow and contingent to major second generation reforms to stimulate the economy that we all now await.

Even the rural markets which are fast becoming a very significant demand centre for automotive products have not been performing as expected. With unseasonal rains last year, the sentiments of the rural consumers have taken a dip, due to which motorcycle demand has been affected. Consequently, the period October 2014 to May 2015 saw de-growth in the motorcycle segment. However, the scooters segment has shown considerable growth reaffirming that the urban consumers still remain upbeat.

The other trend seen during this recovery period is that in the passenger vehicle segment, the growth has been driven by a few major players only. This reflects that there is still no robust or industry-wide growth. Moreover, whatever growth that has taken place it has been on a low base and still hasn't taken the industry to the peak levels of domestic sales as witnessed in March 2012. So, there is a long way to go before the industry fully revives and enters into a sustained growth phase.

Notwithstanding the slow recovery in the market, the year heralded a number of rapidly developing challenges for SIAM – mainly technical in nature.

New developments - activism on air pollution

Environmentalists upped the ante on pollution issues, especially in the city of Delhi. Pollution levels in Delhi which become prominent after Diwali and continues during the winters became a subject of intense media debate. As usual, the accusation was on the auto industry.

SIAM played a key role in responding to the various issues raised at the Supreme Court including the proposal for skipping BS V norms and directly advancing to BS VI norms in 2020.

Higher level of environmental activism also saw various PILs in the National Green Tribunal which is now considering various measures to control pollution e.g. Banning Vehicles over 15 years of age and diesel vehicles of over 10 years in age. Both these issues are being debated at present and final decision from the judicial bodies will come in due course.

Some of these decisions could have far reaching implications on the auto industry. Passenger car manufacturers, Indian as well as multinationals, who have made major investments in diesel

technology, are hoping that knee jerk decisions will be avoided at all costs which otherwise have the potential to jeopardize new investments.

SIAM actions on various regulations

At the request of Government, SIAM internally discussed AFP 2025 timelines and agreed to advance the timelines for BS V and BS VI to 2019 and 2023. In the meantime, BS IV norms for vehicles on a pan-India basis by April 2017 are also expected to be notified shortly.

After almost one year, the amended Notification on Fuel Efficiency Norms for passenger vehicles was finally issued by Ministry of Power on 29 April 2015, addressing some of the errors in the earlier notification and also incorporating the corrected timelines for Phase I and Phase II.

Work to formulate the fuel efficiency norms for heavy duty vehicles has also caught momentum during the year and industry along with PCRA have held many consultations on the workable methodologies and practices that are followed by other countries in this respect.

The development of the VAHAN database entered into its next level during the year with some States like NCT moving on to pilot projects for online registrations of vehicles using the VAHAN system.

In terms of safety regulations, the last one year was a watershed. A total of 20 new safety regulations, many of which were long awaited, were announced during the last 12 months. Some notable ones were on Crash, Bus body code, ABS on certain categories etc.

Furthermore, dialogue on additional safety norms were initiated which includes Bharat New Vehicle Safety Assessment Program (BNSVAP).

Positive impact of new regulations - safety

While this would certainly raise the cost of vehicles for the consumers, but we will be able to take pride in the fact that the safety features in Indian made vehicles would be at par with the contemporary vehicles sold in the developed markets like Europe, Japan etc., even when the purchasing power of the Indian consumer is a fraction of the purchasing power of consumers in the developed countries.

Introduction of FAME scheme

One of the highlights of the year was the final approval accorded by Government to the National Mission on Electric and Hybrid Mobility. After extensive inter-ministerial consultations, the industry-Government partnership led to the approval of the Faster Adoption & Manufacturing of Electric Vehicles (FAME) Scheme in the Union Budget 2015 with allocation of Rs. 750 crores to the Scheme for a period of 2 years and an initial outlay of Rs. 75 crores.

FAME Scheme was formally launched by the Hon'ble Minister of Heavy Industries Mr. Anant Geete on 8th April 2015. The subsequent months have seen a smart pickup in the sales of electric and hybrid vehicles in the country.

In terms of economic activity, SIAM continued its interactions with the Ministry of Finance and Ministry of Heavy Industries on the Pre-Budget recommendations.

Update on efforts towards Fleet modernization, GST, Road Safety

During the year, the long standing recommendation of SIAM to implement a Fleet Modernisation Policy gained wider acceptance and traction with the policymakers given the huge benefits that could accrue to the country by way of reduced emissions, fuel consumption, higher safety on the roads and potential to reduce our carbon footprint in terms of energy consumption for steelmaking. I have no doubt that these positive developments will soon pave the way for instituting a robust Fleet Modernisation Policy based on an incentive scheme which will transform the transportation sector in the country.

The industry has been looking forward to an early implementation of GST. Nevertheless, developments in this regard during the year were mixed. While the new Government has committed to bringing GST at an early date, the current state of Centre-State play may delay the same beyond 2016.

It is evidently clear that there has to be a comprehensive approach to tackle issues of climate change and road safety. Among all the stakeholders, this sets the agenda for SIAM and SAFE for organising and spreading the message on environmental and road safety rule-making progressively / implementation and creating awareness among the public at large. SIAM-SAFE provides support and assistance to Ministry of Road Transport and Highways, Police department; besides, transport departments of different states in implementing Road Safety and Environment related activities.

In the year 2014, Government has announced the inclusion of Road Safety activities as a corporate social responsibility activity under schedule VII of Section 135 of the Companies Act 2013. Ministry of Road Transport and Highways had taken many initiatives in addressing these issues and will be soon bringing the new Road Transport Bill with stringent rules and regulations with the aim of reducing road fatalities.

SIAM- SAFE along with automobile manufacturers tries to spread the messages on road safety and environment issues by organising activities involving their dealer's network with the aim of spreading the safety message all across our nation.

SIAM's International Engagements

SIAM's involvement on the international front remained as dynamic as ever. The IAA Commercial Vehicle Show in September 2014 saw a senior level delegation from SIAM accompanying the Ministry of Heavy Industry to Hannover which participated at the Inauguration of the Show as well as at the India Day organized jointly by VDA, SIAM and ACMA. SIAM continued its active participation at OICA and IMMA and participated in meeting both these international organisations. A senior level delegation from SIAM also attended the Geneva Motor Show and the Detroit Motor Show continuing SIAM's close relationship with its global counterparts.

Concluding remarks

As I lay down office of SIAM President, and also approach the end of the tenure of the first successful Automotive Mission Plan (AMP), it is now time for the industry to look at the next decade and to draw up a Mission Plan from 2016 till 2026. This will be dedicated to the Prime Minister's call of Make in India and to lay down the next level of strategy to leverage the strengths of the Indian automotive industry in supporting the overall manufacturing and services sectors of the country.

I take this opportunity to thank all our partners for the outstanding support during the year and all of you for your support during the year and wish you all the best!



Vikram S Kirloskar

2nd September, 2015



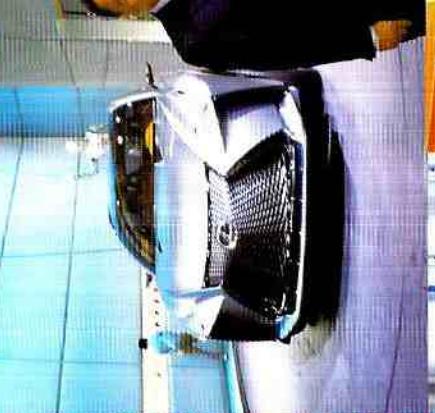
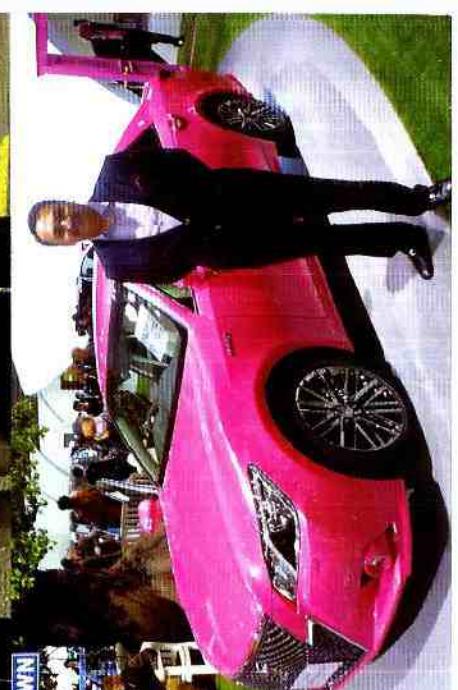
Mr Vikram Kirloskar
President, SIAM & Vice Chairman, Toyota Kirloskar Motor Pvt Ltd



Mr Vinod K Dasari
Vice President, SIAM & Managing Director, Ashok Leyland Ltd



Mr Arvind Saxena
Treasurer, SIAM & President & Managing Director, General Motors India Pvt Ltd





Mr Vikram Kirloskar, President, SIAM, Mr Vinod Dasari, Vice President, SIAM, Dr Abhay Firodia, Past President, SIAM, Mr S Sandilya, Past President, SIAM & Mr Vishnu Mathur, Director General, SIAM at SIAM Executive Committee Meeting



Members at a SIAM Executive Committee Meeting

SIAM

The Society of Indian Automobile Manufacturers (SIAM) is a not for profit apex national industry body representing all major vehicle and vehicular engine manufacturers in India.

SIAM works towards supporting sustainable development of the Indian Automobile Industry with the mission that India emerges as the destination of choice in the world for design and manufacture of automobiles. It works towards facilitating enhancement of the competitiveness of the Indian Automobile Industry, reducing cost of vehicles, increase in productivity and to achieve global standards of quality.

SIAM provides a window to the Automobile Industry in India and works closely with stakeholders in the formulation of the economic 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 reports. It also organises Seminars & Workshops on the topics of topical relevance and interest to the industry. For carrying out various public policy activities, particularly in the field of road safety and environment, SIAM has partnered with other stakeholders and set up the Society for Automotive Fitness & Environment (SAFE).

SIAM works closely with the Government and with international bodies like International Organisation of Motor Vehicle Manufacturers (OICA), International Motorcycle Manufacturers Association (IMMA) and coordinate with other counterpart international associations like, German Association of the Automotive Industry (VDA), Japan Automobile Manufacturers Association (JAMA), The Society of Motor Manufacturers and Traders (SMMT), The Thai Automotive Industry Association (TAIA), Malaysian Automotive Association (MAA), Indonesian Automotive Industry Association (GAIKINDO), ASEAN Automotive Federation (AAF), etc.

SIAM, jointly with ACMA and CII organises Auto Expo, a widely awaited biennial auto exhibition showcasing the trends in the Auto Industry. SIAM also organises regional as well as segment specific shows across the country.

SIAM aims to promote safety, address air quality improvement, compliance with standards and promotes growth with responsibility.

Mission

To become a growth engine of the Indian economy by propelling the Indian Auto industry to a global USD 145 billion industry by 2016 whilst promoting sustainability by addressing the multiple challenges arising out of emissions, climate change, energy independence and safety.

To achieve the mission, SIAM focuses on several areas:

- Improve Indian automotive industry's competitiveness
- Promote development of a sustainable mobility eco-system
- Promote development of Alternative Energy Vehicles
- Achievement of leadership in innovative technology

SIAM 54th ANNUAL CONVENTION

Auto Industry- The Engine of Growth



(L-R) Mr Ramesh Suri, President-Designate, ACMA and Chairman, Global Autotech, Mr. Vinod K Dasari, Vice President, SIAM, Mr. Anant Gangaram Geete, Hon'ble Minister of Heavy Industries & Public Enterprises, Mr. Vikram Kirloskar, President, SIAM, Dr. R. S. Katoch, Secretary, Ministry of Heavy Industries & Public Enterprises and Mr. Vishnu Mathur, Director General, SIAM

The Society of Indian Automobile Manufacturers (SIAM) organized its Annual Convention on 12th September 2014 marking a celebration of 54 years and focusing on issues influencing Indian automotive industry's competitiveness, growth and its integration with the global economy. The theme of 2014 Annual Convention was 'Auto Industry- The Engine of Growth'

The convention saw the participation of more than thousand automobile enthusiasts including the manufacturers, dignitaries, media and officials across India and the globe.

Mr. Vikram Kirloskar, President, SIAM and Vice Chairman, Toyota Kirloskar Motor inaugurated the 54th convention by giving a welcome speech addressing about the current scenario of automotive industry. He thanked the Government for having stood beside the industry in times of need irrespective of changes in Government or the leadership in the Ministry.

Mr. Anant Gangaram Geete, Honourable Minister of Heavy Industries and Public Enterprises, Government of India, in his inaugural address vowed to extend unconditional support to the



Mr. Vikram Kirloskar, President, SIAM presenting the welcome address at SIAM Annual Convention 2014



Mr. Anant Gangaram Geete, Hon'ble Minister of Heavy Industries & Public Enterprises addressing the gathering at the inaugural session of SIAM Annual Convention



(L-R) Mr Pawan Munjal, Vice Chairman & Managing Director, Hero MotoCorp, Mr Nitin Gadkari, Hon'ble Minister of Road Transport & Highways, Mr Vikram Kirloskar, President, SIAM and Mr K K Gandhi, Executive Director- Technical, SIAM at the Special Plenary Session

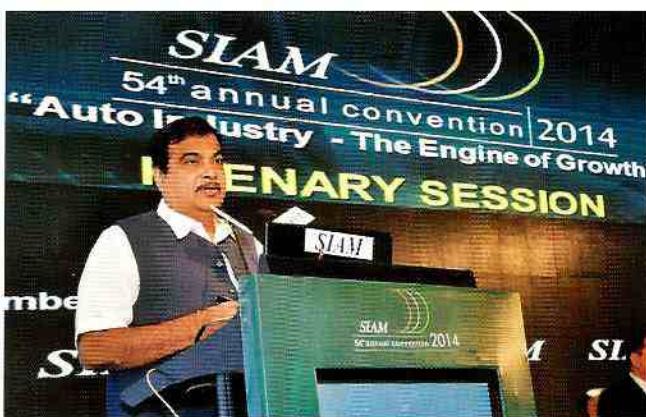
industry in every way possible and support the promise of Mr. Narendra Modi of making India a hub for manufacturing for the industry.

Mr Ramesh Suri, President ACMA and Chairman, Global Autotech Ltd talked about the symbiotic relationship between members of ACMA and SIAM. The session was concluded by a vote of thanks from Mr. Vinod K Dasari, Vice President, SIAM & Managing Director, Ashok Leyland.

Mr Nitin Gadkari, Hon'ble Minister of Road Transport and Highways, Government of India addressed the members in a Special Plenary. He said that exciting times were ahead and investments to the tune of INR 1,00,000 crores had already been cleared by his

Ministry for road building, highways, bridges, etc. The New Motor Vehicle Act Draft will be released for public comments and the Ministry intends to pass the same in the Winter Session of the Parliament.

The first technical session was "Auto Industry – R&D and Technology" co-chaired by Mr Anant Talaulicar, Chairman & Managing Director - Cummins India and Mr Gurpratap Boparai, Chief Executive Officer, Fiat India Automobiles. Mr Carl-Peter Forster, Senior Advisor, A T Kearney Germany talked about the technology trends in automotive industry and emphasized on the need to keep abreast of global development.



Mr Nitin Gadkari, Hon'ble Minister of Road Transport & Highways addressing at the SIAM Annual Convention 2014



(L-R) Mr Gurpratap Boparai, Chief Executive Officer, Fiat India Automobiles, Mr Carl-Peter Forster, Senior Advisor, A T Kearney, Germany, Mr Anant Talaulicar, Chairman & Managing Director, Cummins India and Mr Atanu Ganguli, Sr. Director, SIAM at the session on Auto Industry – R&D and Technology



(L to R) Mr Ravi Pisarody, Executive Director- Commercial Vehicles Business Unit, Tata Motors Ltd, Mr Fumihiko Ike, Chairman, JAMA and Chairman Honda Motor Co., Japan, Mr Kenichi Ayukawa, Managing Director & Chief Executive Officer, Maruti Suzuki India Ltd, Mr Stefan Jacoby, GM Executive Vice President and President, GM International, and Mr Sushil Kumar, Sr. Advisor, SIAM at the session on Auto Industry and its Economic Linkages

The next session was on Auto Industry and its economic linkages. The session was co-chaired by Mr Ravi Pisarody, Executive Director - Commercial Vehicles Business Unit, Tata Motors Ltd and Mr Kenichi Ayukawa, Managing Director & Chief Executive Officer, Maruti Suzuki India Ltd. Mr. Stefan Jacoby, GM Executive Vice President and President, GM International emphasized on the need for a common taxation standard across states that would help cultivate favourable industry policies. Mr. Fumihiko Ike, Chairman, JAMA and Chairman, Honda Motor Co., Japan gave his presentation which focused on the long standing association of India and Japan through automobile trade relations.

Mr Nigel Harris, President, Ford India and Mr K N Radhakrishnan, President & CEO, TVS Motor Company co-chaired the next session "Auto



(L to R) Mr Nigel Harris, President, Ford India, Mr Rajat Dhawan, Director, McKinsey and Company (India), Mr Takashi Hata, Senior Vice President and Chairman for Africa, Middle East and India, Nissan Motor Co., Mr K N Radhakrishnan, President & Chief Executive Officer, TVS Motor Company and Mr Sugato Sen, Deputy Director General, SIAM at the Session on Auto Industry: Exports from India

Industry: Exports from India". The Session focussed on how the current dynamics the global markets presented a major opportunity for the Indian automobile industry. They said that India has the potential to emerge as the export hub for companies if the infrastructure could support the operations ably. Mr. Takashi Hata, Senior Vice President and Chairman for Africa, Middle East and India, Nissan Motor Co explained how Nissan has been using India as an export hub its export vehicles to over 100 countries. He talked of need to focus on some aspects to ensure a brighter future like - strengthening logistics infrastructure, reduction in cost of capital and simplified vendor duty drawback process.

Mr. Rajat Dhawan, Director, McKinsey and Company (India) talked of importance of choosing the target export markets carefully.



(L to R) Mr Raghutama Rao, Managing Director, ICRA Management Consulting Services, Mr Ambuj Sharma, Additional Secretary, Ministry of Heavy Industries & Public Enterprises, Dr. R S Katot, Secretary, Ministry of Heavy Industries & Public Enterprises, Mr Vinod K Dasari, Vice President, SIAM, Mr Saurabh Chandra, Secretary, Ministry of Petroleum & Natural Gas, Dr Pawan Goenka, Past President, SIAM and Executive Director & Group President - Auto & Farm Sector Mahindra and Mahindra Ltd Mr Rajeev Kher, Commerce Secretary, Ministry of Commerce & Industry and Mr Vishnu Mathur, Director General, SIAM unveiling the Automotive Mission Plan 2006-16 Review Report

He said that the basket of countries needed to be rearranged and that FTAs with the key target markets could be useful. He also stressed on the importance of quality of infrastructure, stronger export incentives and simplifying export policies.

The final session - "Auto Industry - Vision 2026" revealed the mid-term review of the Automotive Mission Plan- 2006-2016 and what to expect for Vision 2026. There were several



Dr Pawan Goenka, Past President, SIAM and Executive Director & Group President – Auto & Farm Sector Mahindra & Mahindra Ltd presenting the concluding remarks for the session of Auto Industry – Vision 2026



Mr Pawan Munjal, Vice Chairman & Managing Director, Hero MotoCorp interacting with Japan Automobile Manufacturers Association (JAMA) leadership at the SIAM Annual Convention

startling facts that surfaced in the report that was unveiled. The Session was moderated by Dr. Pawan Goenka, Past President, SIAM and Executive Director & Group President – Auto & Farm Sector Mahindra & Mahindra Ltd and attended by Dr. R. S. Katoch, Secretary, Ministry of Heavy Industries and Public Enterprises, Government of India, Mr. Rajeev Kher, Commerce Secretary, Ministry of Commerce & Industry, Mr. Saurabh Chandra, Secretary, Ministry of Petroleum and Natural Gas, Government of India.

Unveiling the mid-term Review Report, Dr. Pawan Goenka said, "Despite the two massive speed-breakers in 2008-09, 2012-13, the industry has made significant progress and many vehicle price increases have been contained within about 11% though the economy has witnessed an inflation of 77% over the past decade."

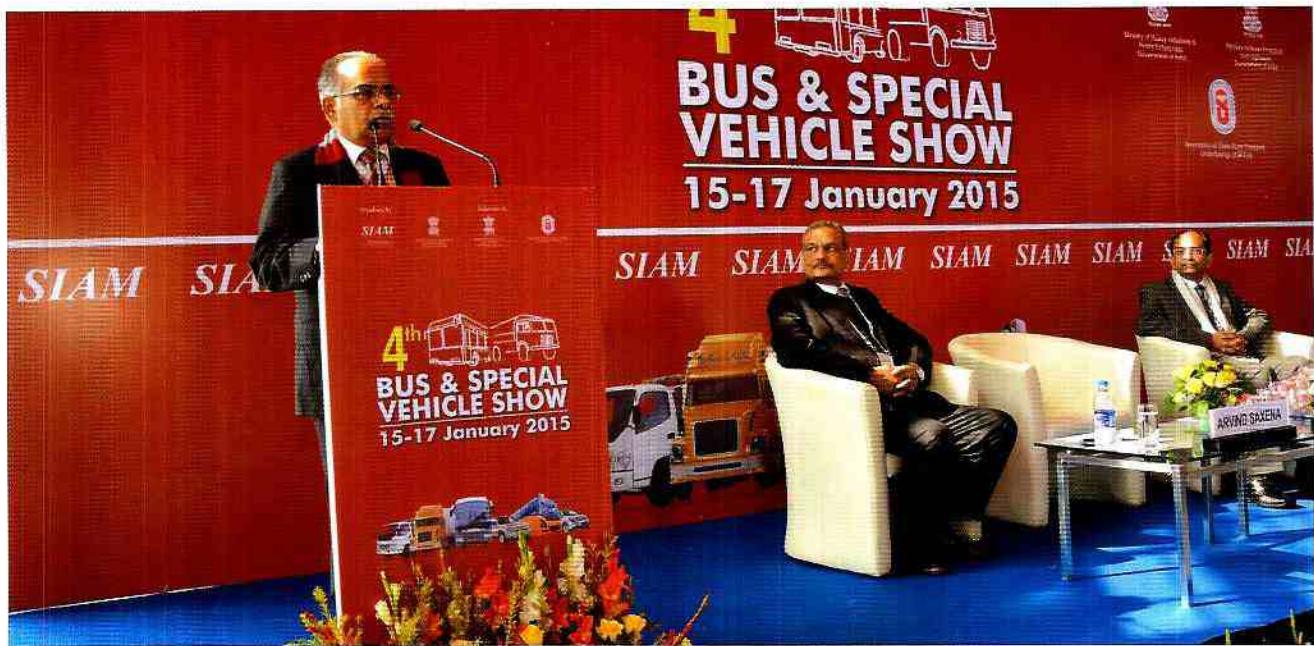
Mr. R. Raghuttama Rao, Managing Director, ICRA Management Consulting Services presented the report and said that the Indian Automobile industry turnover is equivalent to 27% of India's industrial GDP and contributes to approximately 13% of the excise revenues. The industry accounts for 4.3% of the total exports, next only to the textile and handicraft industry in India. Total investment of the industry has been in excess of US\$ 35 billion within this period of which US\$ 24 billion has

been contributed by automobile companies while US\$ 11 billion has been contributed by automotive component companies. The industry represents about 8% of the country's total R&D expenditure. While many interventions have been implemented under Automotive Mission Plan 2006-16, some of the interventions are yet to be put to action. Further, several new issues have emerged that need immediate attention of both the Government and the Industry. While the last decade was predominantly driven by domestic demand going forward, industry is gearing up to meet both domestic and global demand. Considering this, Government of India has started working on the next phase of AMP i.e. AMP 2016-26 so as to address the unfinished agenda of AMP 2016 and target new initiatives keeping in mind the current and expected market dynamics.



Senior dignitaries at the SIAM Annual Convention 2014

BUS AND SPECIAL VEHICLE SHOW 2015



Mr. Ambuj Sharma, Additional Secretary, Ministry of Heavy Industries and Public Enterprises, Mr. Arvind Saxena, Chairman, SIAM Trade Fair Group and President & Managing Director, General Motors India Pvt Ltd India and Mr. Vishnu Mathur, Director General, SIAM at Inaugural Ceremony

The 4th SIAM Bus & Special Vehicle Show 2015 (BSVS) was organised by SIAM from 15 - 17 January 2015 at India Expo Mart, Greater Noida, Delhi NCR. The show was supported by Ministry of Heavy Industries & Public Enterprises, Ministry of Road Transport and Highways and Association of State Road Undertakings (ASRTU).

The show was inaugurated by Mr. Ambuj Sharma, Additional Secretary, Ministry of Heavy Industries & Public Enterprises.

The opening day of the event saw the launch of Ashok Leyland Versa, its first ever electric bus. The bus is driven by a 52 KW of Lithium Ion Batteries of 24V 135 Ah. The all electric drive-train results in minimal environmental impact including zero tailpipe emissions. Force Motors displayed a Fire brigade, an ambulance, a Gurkha and a Force Traveller. General Motors displayed 2 of its vehicles Taveras and an Enjoy. Isuzu Motors showcased a mobile service vehicle. Mahindra & Mahindra showcased a



Inaugural Ceremony



Launch of 'Versa' Electric Bus by Ashok Leyland

40 Seater school bus (Touristercosmo BS4), a 40 Seater Staff bus (Touristercosmo BS3) and a Maxximo Mini School Van. Renault showcased the Duster and Scala. SML Isuzu showcased 3 buses, Tata Motors Ltd showcased a range of their commercial vehicle products, including ULTRA MIDI 900 mm AC, ULTRA BS4 - 3 L Engine AC vehicle, ULTRA BS3 - Safe School Bus, 1512 LUXURY Vehicle Jupiter Face from ACGL, BUS MUSUEM, Articulated Bus - LONG City Bus, Winger DICOR BS4 and 3L BS4 engine display. Toyota Kirloskar Motor put on display the HiAce and Mitsubishi showcased a Pajero Sports. Allison Transmission, Hindustan Petroleum, Innova Rubbers, K B Autotech, Panasonic India, Sidwal Technologies, AVL, Panasonic India, Trans ACNR Solutions too showcased their products in the show.

BSVS 2015 recorded attendance of almost 6,000 visitors, mostly Business Visitors. The event generated a lot of business enquiries from the members of Contract Bus Association, members of Indian Association of Tour Operators, members of Indian Association of Bus Manufacturers, State Road



Mr. Ambuj Sharma, Additional Secretary, Ministry of Heavy Industries and Public Enterprises visiting Tata Motors stall

Transport Undertakings, Officials of ASRTU, Government Officials from various Ministries of Government of India, Private Hospitals, School & Educational Institute Management, Travel Houses, etc who visited the show.

As a concurrent event, SIAM Logistics Group organised the 2nd SIAM Automotive Logistics Conclave. The theme for the conclave was "Multi Modal Solutions for Automotive Logistics". Also, a seminar was organized by SIAM in association with the Association of State Road Transport Undertaking (ASRTU). The seminar was attended by the State Road Transport Authorities, ARAI and Bus Manufacturers.



(L to R) Mr Vishnu Mathur, Director General, SIAM, Mr Akbar Badusha, Deputy Director & Head VEL Dept., ARAI, Mr P K Banerjee, Vice President, SAFE, Mr Nitin Gokarn, CEO & Project Director, NATRIP, Mr P S Anand Rao, Executive Director, ASRTU, Mr Gopalakrishnan S, Head Vehicle Electrical and Electronics, Ashok Leyland Ltd, Mr Arun S, Head - Homologation, Ashok Leyland Ltd and Mr P K Patra, Director, ASRTU at the Workshop on Upcoming New Technologies in Buses



Mr. Nitin Gadkari, Hon'ble Minister of Road Transport & Highways, Government of India visits the exhibition

Visit of Mr. Nitin Gadkari, Hon'ble Minister of Road Transport and Highways

Mr. Nitin Gadkari, Hon'ble Minister of Road Transport and Highways, Government of India visited the Bus & Special Vehicles Show on second day. Mr. Gadkari was very positive about the show as it displayed future public transport vehicle options. He took out time to visit all the exhibitors participating in the show and remarked that it was heartening to see the industry grow and said that it would get all the required support from the government.

Road Safety Training for Students

As an engagement drive, SIAM also invited students from schools and colleges to be given the training on Road Safety and witness the latest technologies and innovations in the industry at the show.

Some of the major participants at BSVS 2015 included Ashok Leyland, Force Motors, General Motors, Isuzu Motor, SML Isuzu, Tata Motors, Toyota Kirloskar Motor, Renault India, Mahindra & Mahindra, Mitsubishi, Allison Transmission, Krishnapatnam Port, Hindustan Petroleum Corporation Ltd, State Bank of India, Sidwal Technologies, Panasonic India, Trans ACNR and many more.



Road Safety Training during the BSVS 2015



The prime objective of this show remains to showcase the latest technological developments in the industry thus providing manufacturers an ideal platform to interact with focused customers with higher visibility specially in launching new products



ECONOMIC & COMMERCIAL AFFAIRS



Participants at the Taxation Group meeting



SIAM members at the Post-Budget meeting of the Taxation Group

SIAM Taxation Policy, Procedure and Direct Tax Groups

Taxation Policy, Procedure and Direct Tax Groups comprise of common members from the taxation division of member companies but are chaired and co-chaired by different people. The three groups' together look into all concerns with regards to taxation matters. The regular activities of these Groups include:

1. Preparation of suggestions for the Union Budget – Pre-Budget and Post Budget.
2. Regular interaction with the Government on taxation concerns.
3. Sharing of concerns and best practices.

In the last one year, the groups met several times to discuss various important, impending issues faced by the automobile industry. In September 2014, the Group met in Jaipur to discuss the issues to be taken up in pre-budget memorandum. The group also discussed Goods and Service Tax, with emphasis on Opportunity and Challenges for automobile industry. Many procedural issues were also taken up during the meeting. SIAM Pre-Budget Policy and Procedural Memorandums 2015-16 was finalized by SIAM Taxation groups

and submitted to the Government in November 2014.

Union Budget: Pre-Budget Submission and Meetings

SIAM was invited by Ministry of Finance to present their recommendations for the Union Budget 2014-15 in November 2014. SIAM team was led by Mr Vikram Kirloskar, President – SIAM and Vice-Chairman, Toyota Kirloskar Motor, in the meeting with Revenue Secretary. The key recommendations made were as below:

1. Continue with the concessional excise duty rates beyond December 31, 2014.
2. Excise Duty Rates for Components and Parts falling under Chapter 8707, 8708, 8714 and 4011 to be reduced to avoid CENVAT credit accumulation at the OEMs.
3. Address the financial difficulty caused by differential excise duty on component and vehicle which is affecting the companies with manufacturing units in tax free zones of hilly states.
4. Introduce GST across all states and share the draft modalities & procedures. Industry needs minimum 3 months for smooth

transition. Taxation of Used vehicles should be covered as well as all taxes including road tax should be subsumed in GST.

5. Excise duty rate for chassis of ambulance should be reduced.
6. 1% NCCD on Vehicles should be withdrawn. Until the time NCCD is not withdrawn, payment of NCCD from CENVAT should be allowed (finalize the draft circular issued in September 2012).
7. Legislative amendment required to Central Excise Act - Excise duty should not be applicable on Sales Tax/VAT benefit given by state government (Supreme Court judgment in case of Super Synotex and Maruti Suzuki).
8. Retain Customs tariff on CBUs for Cars/ MUVs/ Passenger 3-wheelers under Tariff Heading - 87.03 and Two-Wheelers/ Goods Three Wheelers under Tariff Heading - 87.11, while increase the custom tariff on Commercial Vehicles falling under Tariff Heading - 87.02 & 87.04 to 40%.
9. Incentivize replacement of vehicles, which were registered before the year 2000 when the first emission norms were introduced in India.

SIAM was also invited by Department of Heavy Industry and Department of Industrial Policy & Promotion to present the pre-budget recommendations in December 2014.

Union Budget 2015-16 Announcements

The Union Budget 2015-16 was presented by Shri Arun Jaitley, Hon'ble Minister of Finance, Corporate Affairs and Information & Broadcasting in February 2015. A few announcements which directly affected automobile industry were as below:

1. Approval accorded to the Scheme on Faster Adoption and Manufacturing of Hybrid

and Electric vehicles in India (FAME), with initial allocation of Rs. 75 crores

2. Extension of concessional customs and excise duties on select parts used in the manufacturing of Electric & hybrid vehicles for a year.
3. The effective custom duty rate on commercial vehicles was increased to 20%.
4. The excise duty on chassis of ambulances was reduced from 24% to 12.5%.

Post Budget Submission

SIAM Taxation groups had met in March 2015 to finalize the post union budget submission. The key recommendations were as below:

1. Amendment should be made in Cenvat Credit Rules to allow utilization of credit of Education Cess and Secondary & Higher Education Cess for payment of Basic Excise Duty Liability or Basic Service Tax Liability.
2. There should be no separate Cess, such as Swachh Bharat Cess. Any cess should be subsumed in the Basic Service Tax Rate itself.
3. Digital signature should be allowed on all copies of invoice issued by manufacturer without any requirement of self-attestation on any copy of invoice.
4. Criminal proceedings are continued even if tax is paid in civil proceedings. It was suggested that once the disputed tax is deposited, the noticees should be absolved of criminal proceedings.

Goods & Services Tax

SIAM Taxation Groups have been deliberating about Goods & Services Tax (GST) since many years. The Groups in its meetings have finalized views on GST and a paper alongwith a presentation was submitted to the Select Committee of Rajya Sabha on the Constitution

(122nd Amendment) (GST) Bill, 2014. Some of the issues raised were:

1. Proposed Additional Tax (AT) of 1%
2. Subsume All Taxes/Duties
3. Special process and provisions for Sale of Pre-Owned / Used Vehicles
4. Minimum exemption / 100% credit flow to business
5. Protection of benefits under Area based exemptions
6. IT System
7. Statutory forms

The presentation included submission on the following sections in the bill:

- 1) Section 279A: Establishment & Power of GST Council.
- 2) Section 366 (12A): Definition of 'goods and services tax'
- 3) Section 18: Additional Tax (AT) of 1%

SIAM Economic Research Group

Economic Research Group comprises the economist and business planner of member companies. The objective of the group is to understand the research needs of the industry and work towards producing reports to contribute to industry's research needs. The Group is engaged in demand forecasting exercise for the automobile industry and



ICRA team presenting during the Economic Research Group meeting

organizes the Looking Ahead Conclave every year in the month of January. SIAM Economic Research Group has commissioned many studies in the past and in the last one year the group has been working actively on the 'Automotive Mission Plan 2016-26'.

The Group regularly interacts with the consultants to provide information and feedback for framing of the Automotive Mission Plan 2016-26. The Group also continuously interacted with CRISIL Research to share market insights to help them forecast automobile demand in the country.

SIAM Looking Ahead Conclave - Preparing for Turnaround

SIAM organized the 9th Looking Ahead Conclave - Preparing for Turnaround on 12th January 2015 in Hotel Taj Mansingh, New Delhi. In the inaugural session, Mr Vinod Dasari, Vice President, SIAM & Managing Director, Ashok Leyland addressed the gathering. Guest of Honor - Mr Ambuj Sharma, Additional Secretary, Department of Heavy Industry congratulated SIAM on organizing the conference and presented his views on the support Department of Heavy Industry is extending for electric mobility and drafting of the next automotive mission - 'Automotive Mission Plan 2026'.

Speakers shared their views on future of economy and industry, on Politics-Society,



Participants at the 9th Looking Ahead Conclave



Mr Vinod K. Dasari, Vice President SIAM & Managing Director Ashok Leyland, addressing the participants at the 9th Looking Ahead Conclave

and how consumers are likely to behave under different circumstances. Experts shared their forecasts for the automobile demand in Financial Year 2016. In the post lunch session, the forecasts by experts were deliberated upon by senior marketing and sales heads of companies. Each segment reached consensus as to how the industry might perform in 2015-16. In the final session of the day 'Looking beyond boundaries' Mr. Rajan Anandan, Managing Director, Google India presented his views on 'The Digital Future'.

Trade Fair

Apart from organizing the Bus & Special Vehicles Show in February 2015, the Trade Fair Group started preparations for Auto Expo - The Motor show 2016. In the first meeting on Auto



Expo, the Group discussed different aspects like - Event Timings, Specifications of halls, Venue facilities, Areas of concerns of members, help/

support required from members. The Motor show logo was finalized in the meeting.

In the next meeting of the Group held in June 2015 at IEML, Greater NOIDA, members discussed the Rules & Regulations for the Motor Show and the facilities, including the new permanent halls in the hard standing area where temporary Halls 9-15 were located during the last event.



Trade Fair Group Meetings

OICA Exhibition & Selection Committee Meeting - March 2015, Geneva

SIAM participated in the OICA Exhibition & Selection Committee meeting, which finalised the 2015 Motor Show Calendar with inclusion of the Commercial Vehicle Show in Sao Paulo and also reviewed the 2016 calendar which is going to be finally adopted at October 2015 OICA General Assembly.

Motor Show Visits

On invitation from Korea Automobile Manufacturers Association a team of SIAM Secretariat visited the Seoul Motor Show to study the organization of the event. The team also met Mr. Yong-Guen Kim, President, OICA and officials from China Association of Automobile

Manufacturers (CAAM), Japan Automobile Manufacturers Association (JAMA), Korea Automobile Manufacturers Association (KAMA) and The Thai Automotive Industry Association (TAIA).

On invitation from China Association of Automobile Manufactures (CAAM), a team from SIAM Secretariat visited the Auto Show Shanghai in April 2015 to study the organization of the event.



Auto Show Shanghai 2015



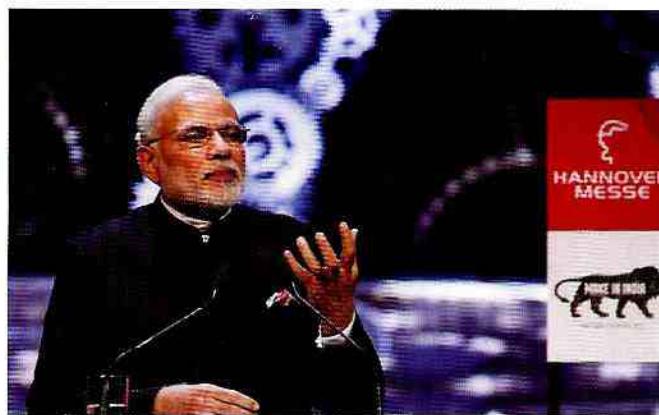
Seoul Motor Show 2015



Seoul Motor Show 2015



SIAM stall at Hannover Messe, 2015



Mr. Narendra D Modi, Hon'ble Prime Minister of India at the inauguration of India Pavilion at Hannover Messe, 2015

"Make in India" at Hannover Messe 2015, April 2015, Hannover, Germany

SIAM participated in this year's Hannover Show, where India was the partner country this year. Government of India promoted "Make in India" at Hannover Messe 2015 from 13th - 17th April, 2015, where more than 350 Indian companies from various sectors participated to showcase their latest product and technology development. SIAM along with ACMA, TAGMA, IMTMA, IEEAMA, ARAI and others participated in Department of Heavy Industry, Ministry of Heavy Industries & Public Enterprises, Government of India pavilion. India pavilion with the theme "Make in India" was inaugurated by Mr. Narendra D Modi, Hon'ble Prime Minister of India and Dr. Angela Merkel, H.E. Chancellor of Germany.



SIAM stall at Hannover Messe, 2015

Human Capital Group

SIAM Human Capital Group met several times during the year to regularly review the activities of the Automotive Skills Development Council (ASDC) for which the CEO briefed members on National Occupational Standards (NOS) and analytics of statistics in terms of enrollments and certifications.



Human Capital Group meeting in progress

Members were informed that a large number of ASDC certifications will be coming out in the market. CEO ASDC requested members to share their talent requirements and forecast with ASDC to enable planning and mobilization by ASDC partners. They mentioned that database of certified candidates is now available on its website: www.asdc.org.in and requested members to start using it for recruitment purposes.



SIAM members at SIAM Human Capital Group meeting

Last year SIAM Human Capital Group initiated a Remuneration Survey for Blue Collar Workers' covering Indian Auto and Auto Ancillary Industry, which is being conducted by Employers' Federation of India (EFI). The survey will provide valuable information to the participating organizations for developing remuneration structure for workers in different automotive hubs: North I: Gurgaon, Manesar, Greater Noida; North II: Uttarakhand; South: Chennai, Bangalore; West I: Gujarat; and West II: Pune, Chakan, Ranjangaon, Aurangabad, Mumbai

A Sub-group has been created under the SIAM Human Capital Group to work on Labour Law reforms and its impact on Auto Industry. The Group is also working on Industrial Relations (IR) related issues.

The next edition of SIAM HR Conclave has been scheduled to be held on 3rd - 4th December 2015 in Pune.

Anti-Counterfeiting Group

The Group delves into the two most important aspects of spare parts business i.e. to enhance use of genuine parts in the aftermarket and to reduce use of counterfeit (non-genuine) parts. The Group focuses on technical issues including regulations applicable for spare parts, logistics and access, IPR etc. and marketing issues including brand promotion, awareness

campaigns, outreach programs on digital media, participation in trade shows including The Motor Show etc.

Logistics Group

SIAM Logistics Group deliberates on vehicle logistics aspects of member OEMs. In December 2014, Haryana Government stopped issuing fitness certification to vehicle carriers, as they were oversized. Two wheeler transport operators went on strike from 5th January 2015 and stopped loading of two wheelers from OEMs. To resolve the Issue of Vehicle Carrier Dimensions, a SIAM Delegation had met the Hon'ble Chief Minister of Haryana and the Transport commissioner, Haryana on 7th January 2015 and requested him to resolve the issue expeditiously. There was a positive response from the Chief Minister as well as the Transport Commissioner and the meeting resulted in a onetime relaxation for a period of one year under bond. SIAM is pursuing an early resolution of the situation and in this regard also met the Hon'ble Minister of Road Transport and Highways on 19th March 2015. He assured that the Ministry would notify the final dimensions for vehicle carriers as soon as possible.

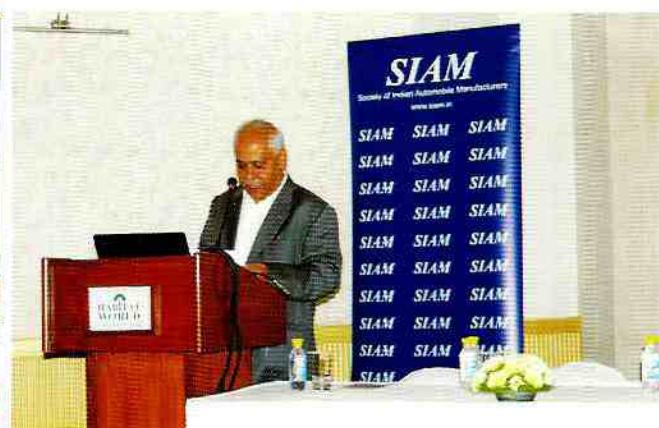
Continuing the railway initiative, SIAM on being invited by the Ministry of Railways participated in the interactive session with the Hon'ble Railway Minister Mr Suresh Prabhu. This was followed up by submission to the Railway Board of a paper covering the



Logistics Group meeting



2nd SIAM Automotive Logistics Conclave



Mr. Prem Verma, Chairman Logistics Group, welcoming participants to the Logistics workshop.

issues of concern of the OEMs in using the rail mode of transportation for finished vehicles. Deliberations have also been held with the Dedicated Freight Corridor Corporation of India Ltd. about suitability of the Western and Eastern Corridors for Vehicle logistics. SIAM is also in touch with the Central Railside Warehousing Corporation for development of Warehousing facilities.

SIAM has now taken up the development of Waterways and Coastal Shipping for transportation of finished vehicles. Suggestions to facilitate usage of Coastal Shipping for vehicle logistics have been submitted to the Ministry of Shipping, Govt. of India and further deliberations are on. Some concessions have already been announced. Deliberations are also on regarding development of Port Facilities.

During the year SIAM organized the second edition of the Automotive Logistics Conclave

at India Expo Mart, Greater Noida, Delhi NCR. The theme for the conclave was "Multi Modal Solutions for Automotive Logistics. The Conclave looked at promoting finished vehicle logistics through Railways and Coastal Shipping, so as to reduce the burden from Roads and Highways.

The logistics group of SIAM organised a workshop on Goods & Services Tax (GST) on 15th July in New Delhi. The objective of the workshop was to create awareness about the upcoming GST amongst Supply Chain, Marketing and Taxation officials of the SIAM member companies. Presentations were made by leading consultants E&Y, KPMG, A T Kearney and PwC on various aspects of GST and also had interactions with the audience. More than 100 participants from OEMs and Logistics Service Providing companies attended the workshop.



Participants at the SIAM GST Workshop



Sourcing Group Meeting



SIAM meeting with Taiwanese Delegation

Sourcing Group

The SIAM Sourcing Group deliberates on the issues of concern to the members regarding sourcing of various inputs. The group held several meetings including joint meetings with the members of the Automotive Component Manufacturers Association of India (ACMA). The group commissioned a joint SIAM-ACMA study on Mitigating Supply constraints in Automotive Ferrous Castings. The report is in its final stage. The Sourcing Group brings out the Monthly Commodity Price Monitor that tracks the movement of prices of various commodities of interest to the Auto Industry. The Group decided to add a section on updates on Anti-Dumping and Safeguard duties in the Price Monitor. The Group also discussed the list of components, not produced in India, such as Electronic Sensors, ABS, Airbags, etc., it was decided that members will share their inputs and make it an exhaustive list, which will be discussed in the next joint SIAM-ACMA meeting.

SIAM participated in deliberations with BIS regarding automotive steel standards. A standard on Coated Steel Sheets for Automotive Applications is under formulation. SIAM continues to be a member on the Committee constituted to examine applicability of the Standards covered under the mandatory marking scheme of BIS/ Dept. of Steel.

Automotive OEMs are exempted from mandatory BIS marking on tyres and tubes being used by them for original fitment on vehicles produced by them. Exemption is also available on tyres imported for service requirements for which a list is notified periodically by the Government. SIAM took active participation in these meetings during the year to ensure that interest of members is protected.

SIAM Sourcing Group also mounts delegations abroad to explore new sources of supply of inputs. During the year, delegations of members visited the China International Auto Products Expo 2014 (CIAPE 14) held in Shanghai China and the Taipei International Auto Parts and Accessories show held in Taipei in April 2015. They held discussions with prospective business associates for taking the same forward upon return to India.

A delegation of representatives of industries from Taiwan led by the Taiwanese Ambassador in India met SIAM sourcing members to explore business tie ups with Indian auto industry. The meeting exchanged background information on the Indian Automotive industry and the Taiwanese Industry.

Subsequently the members of the delegation held separate meetings with the OEMs based on their mutual interest.

Service Heads Group

SIAM Service Heads Group is actively involved in discussions on vehicle recall with Ministry of Road Transport & Highways and Inter Ministerial Core Group Meetings. The vehicle recall code was also taken up at 43rd CMVR Technical Standing Committee Meeting and the proposed draft notification was shared for implementation of the scheme with a lead time of one year, considering the time required for setting up various administrative bodies such as nodal agency etc. It was agreed that this Scheme would be notified as a national level document. It was opined that various definitions in the document should be notified as rules and the finalized document could be the code of practice.

Information Technology Group

SIAM IT group worked on Auto Data Exchange (autoDX) during the year, a collaborative initiative by Society of Indian Automobile Manufacturers (SIAM) and Automotive Component Manufacturers Association (ACMA). This B2B Cloud based Platform, developed by IBM Technologies, standardizes Data Exchange across the automotive eco-system and promises to bring down transaction costs very significantly. The vision of autoDX is not limited to OEMs and Suppliers, but extends to trading partners, logistics providers, banks, statutory bodies and other entities that are allied or linked to these companies.



SIAM autoDX GC meeting in progress

Currently 6 SIAM and 60+ ACMA members have enrolled for the pilot implementation. Some of the SIAM members who have joined the platform are Tata Motors, Bajaj Auto, Hero MotoCorp, TVS, FIAT, Force, etc.

On 19th February 2015, a Solution Integrators Conference, was organised in Pune. RFQ was floated and over 15 vendors various have come forward with their proposals. The proposals are currently being evaluated to select certified Solution Integration Partners.

International Relations & Trade Policy Group

SIAM International Relations & Trade Policy group was active through the year organizing events and enhancing relation with international bodies for automobile industry and providing feedback to Ministry of Commerce on various bilateral and multilateral talks



Mr. Vikram Kirloskar, President, SIAM, Mr. Fumihiko Ike, Chairman JAMA signing the MoU. Mr. Ambuj Sharma, Additional Secretary Ministry of Heavy Industries & Public Enterprises & H. E. Mr. Takeshi Yagi, Hon'ble Ambassador of Japan to India witnessing the event

including Comprehensive Economic Partnership Agreement (CEPA), Comprehensive Economic Cooperation Agreement (CECA), etc. On trade policy front, SIAM continued to emphasize need for supporting SIAM recommendations for negative list of items and robust rules of origin definition in the negotiations for India-EU FTA, Regional Comprehensive Economic Partnership (RCEP) negotiation, trade



SIAM-JAMA meeting in progress



Mr. Sugato Sen, Deputy Director General, SIAM addressing the participants at the China Auto Forum

agreement with Australia, etc. SIAM participated in multiple meetings of RCEP including consultation with partner countries and provided its views on the negative list of items and Rules of Origin. During the year, SIAM also released a whitepaper entitled "Trade Agreements that May Jeopardize 'Make in India Programme' for Automobiles" to emphasize on the need for signing trade agreements with the markets rather than competing countries, which we have been doing until now.

As an on-going activity, SIAM remained engaged in dialogue with APEC AD, OICA, IMMA, JAMA, VDA, SMMT, KAMA, CAAM, TAIA, AFM, etc and exchanged information on current status of the industry, changes in policies and trade agreements being discussed globally, etc. A High-level delegation from JAMA had participated in the SIAM Annual Convention in September 2014. The delegation was led by Fumihiko Ike, Chairman, JAMA and Chairman Honda Motor Company. A Memorandum of Understanding (MoU) was signed between Society of Indian Automobile Manufacturers (SIAM) and Japan Automobile Manufacturers Association (JAMA) to reinforce the friendly and cooperative relationship between both the organizations and help both them provide opportunities to continue the exchange of information.

China Auto Forum – April 2015, China

SIAM participated in 2015 China Auto Forum, themed "China Automotive Industry under the New Economic Normal", which was held in Shanghai from April 20th to 22nd. China Auto Forum is a top and high-end auto forum in China, organized by CAAM (China Association of Automobile Manufacturers), supported by OICA (International Organization of Motor Vehicle Manufacturers) and World Economic Forum (Davos). SIAM gave a detailed presentation on "Indian Auto Market Trends".

21st APEC Automotive Dialogue, September 2014, Shanghai

SIAM participated in the 21st APEC Automotive Dialogue held in Shanghai from 17th – 19th September as a guest where member economy



21st APEC Automotive Dialogue in progress



Participants at the 21st APEC Automotive Dialogue in Shanghai

officials and senior industry representatives work together to map-out strategies for increasing the integration and development of the automotive sector within the region. The goals of the AD are to engage participants in cooperative efforts to foster the growth and development of the regional auto industry and to provide actionable recommendations to APEC Trade Ministers. SIAM also attended a workshop on Electric & Hybrid Electric Vehicles organised as part of the Dialogue.

22nd APEC Automotive Dialogue - April 2015, Manila, Philippines

SIAM participated in the 22nd APEC Automotive Dialogue meeting during 22nd - 24th April 2015 at Manila, Philippines as a guest where various trade related issues were discussed. These include updates on regional

trade liberalization and integration, free trade agreements, automotive tax structures, regulation and standards, and updates on auto parts development.

Also, a workshop was organised on linking automotive part suppliers to the Global value chain.

Exports Group

SIAM Exports Group was involved in providing inputs for Foreign Trade Policy 2015-20 and raising tariff and non-tariff concerns affecting automobile exports to various markets. The Group met with Commerce Secretary and many other officials in the Department of Commerce to present its suggestions for Foreign Trade Policy 2015-20 and suggested measures for enhancing exports of vehicles from India. The key suggestions made to Director General Foreign Trade were as below:



Participants at the 22nd APEC Automotive Dialogue in Manila



Members at SIAM Exports Group meeting

1. Remove the multiplicity in incentives
2. Introduce Focus Product Scheme for Vehicles
3. Reduce time taken for duty realization
4. Introduce dedicated desk at ports for vehicle exporters
5. Improve infrastructure at warehouses and roads that lead to ports

The new foreign trade policy was released in April 2015. There were many announcements on procedural simplification as had been recommended in our submission, however the incentive rates under various schemes were reduced from 2% - 4% for automobile in various markets to a flat 2% in some markets. In a few key markets, such as Sri Lanka and Bangladesh, the incentive was totally withdrawn. SIAM Exports group continues to engage in dialogue with the Government to get the incentives reinstated in key markets.

SIAM also interacted with the Duty Drawback Committee regularly to provide information and justifications for a higher duty drawback rate.

Passenger Vehicle exports to Algeria were affected due to sudden change in technical regulations in the country. The issue was taken up with Department of Commerce and in a Joint Commission meeting between

Government of India and Government of Algeria a delegation of SIAM was given an opportunity to express their concerns to the Algerian authorities. A few newly introduced regulations were rolled back subsequent to the interaction.

CSR & Community Services Group Initiatives

The Group met a few times during the year and identified areas that are common under SIAM member's CSR initiatives:

- Road Safety / Traffic Management / Drivers' Training
- Environment / Air Quality
- Girl Child / Sanitation / Bio-Digester Toilets
- Education / Skill Development

The Group is preparing a detailed compendium of information on SIAM member's CSR Activities and budget spent and their future plans for next year. The document can showcase the good initiatives of automobile industry to the society.

The Group is deliberating on several initiatives including defining "Model Village" (what are all factors are necessary requirements to call it a Model Village including the cost implications), "Transport Solutions in Smart Cities", etc.



Members at SIAM CSR & Community Services Group Initiatives meeting



Members at SIAM Finance, Leasing & Insurance Group meeting



Members at Vahan Workshop in New Delhi

Finance, Insurance & Leasing

SIAM Finance, Insurance & Leasing Group met in May 2015 and the representatives of General Insurance Council (GIC) informed the group about the concept of the Insured Declared Value (IDV) and its advantage for the customers. They also shared the work-in-progress, web database that they had created with the information available to them.

Vehicle Classification, Sales Reporting & Analysis

SIAM Vehicle Classification group met in August 2014 to discuss the existing vehicle classification followed by the industry, and reviewed all the categories in detail and proposed a few changes, wherever required, most of which have been implemented.

The Group, through a Cross Functional Team, has also been working with MoRT&H and NIC for developing On-line Vehicle Database System for vehicles produced for sales in India. This portal would be used for vehicle registration by the different State Governments. The format and parameters of the data to be uploaded was finalized by SIAM members, along with NIC, and the activity commenced from 01st January 2015.

A workshop on the Vahan project was also organised by SIAM for MoRT&H and NIC,

on 19th November 2014 in New Delhi. The objective of the workshop was to educate the Manufacturers on the structure of the newly developed Vahan portal for entering the vehicle specific details and uploading bulk data. Delhi Government recently mandated uploading of Ex-Showroom Prices, along with other details, on the Central Vahan portal.

SIAM participated in the OICA Statistical Committee which met in Paris on October 07th 2014 to discuss issues related to reporting of motor vehicle statistics. One of the key issues that emerged was that the OICA statistics were getting seriously impacted because of non-reporting of data especially in Commercial Vehicle segment by some companies in several countries. SIAM pointed out that in India even Passenger Vehicle data by a few manufacturers are not available. Members took serious view and decided to raise this matter in OICA council and other platforms to get it resolved.

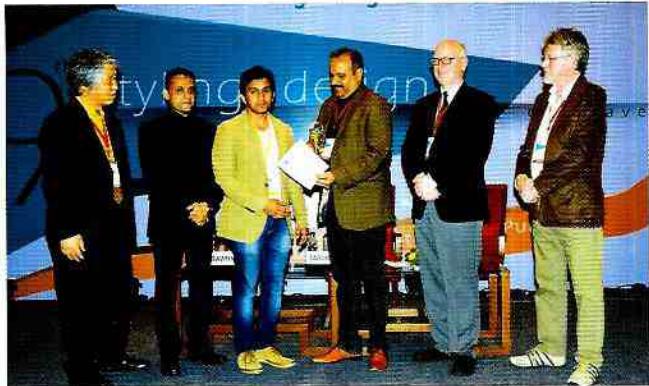
Styling & Design

SIAM Styling & Design group organized the 9th edition of the Styling & Design Conclave on 6th February 2015 at Hotel Hyatt, Pune. The theme for the conclave was 'Innovation through Design'. The event was graced by eminent national and international speakers.

SIAM started a new initiative of commemorating the contributions of senior leaders,



Mr. Glynn Kerr, world famous Motorcycle Designer, addressing the audience



Mr. Sumit Sawhney, Country CEO & MD, Renault India, presenting the award to the first prize winner of ADC 2015

who played a significant role in advancing the causes of Automotive Styling & Design in India. The first such award was presented by Mr. Sumit Sawhney, Country CEO and MD, Renault India to Mr. Bidyabijay Bhaumik, the former Chief Designer at Mahindra & Mahindra, for his contributions to the domain.

Like in the past, the Group also organised the 8th Automotive Design Challenge (ADC) coinciding with the Conclave. All the three winners of ADC were from DSK ISD Rubika, Pune.

The group also organised three Regional Automotive Design Workshops, across the country. These workshops were aimed at bridging the gap between the industry and the academia in the field of automotive styling.

The group is also planning to commence a study on "Automotive Design Initiative", for which talks are currently going on with the government.



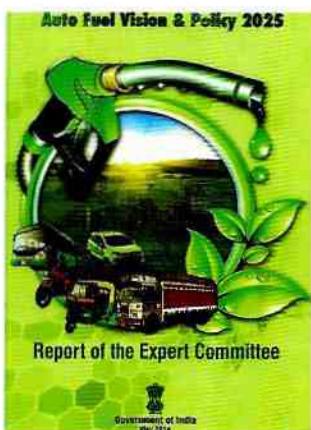
Mr. Anil Saini, Director-Design, General Motors India Pvt Ltd, Chairing a Group meeting



SIAM honouring Mr Bidyabijay Bhaumik - Former Chief Designer at Mahindra & Mahindra, with the Lifetime Achievement Award

TECHNICAL REGULATIONS

Emissions and Conservation



Following the finalization of the report of the Expert Committee on Auto Fuel Vision and Policy 2025 in May 2014, there have been several representations for advancement of Emission regulations by different

stakeholders. There are recommendations to skip BS V Emission norms and move directly to BS VI Emission norms in the year 2020 after BS IV Emission norms are implemented across the country in 2017. Automobile Industry has also offered to meet BS V Emission norms in the year 2019 provided fuel is made available by the Oil industry, i.e. 2 years after BS IV is introduced across the country and then move to BS VI emission norms in the year 2023. A review on the same was also done by Ministry of Heavy Industries & Public Enterprises (MoHI). Presently the extension BS IV Emission norms are being undertaken by Government of India in phases. Decision is awaited from the Government of India to finalize the roadmap for future



(L to R) Dr. Timothy Leverton, President & Head – Advanced and Product Engineering, Tata Motors Ltd, Mr Ravi Pisharody, Executive Director - Commercial Vehicles, Tata Motors Ltd and Mr Vishnu Mathur, DG, SIAM during SIAM Meeting for future Emission Norms

emission regulations. SIAM has expressed reservations on skipping the BS V Emission norms. The matter is also being heard in the Hon'ble Supreme Court following an application filed by Environment Pollution (Prevention & Control) Authority (EPCA) and in another similar case National Green Tribunal (NGT), Pune Bench is hearing a matter to expedite BS VI emission norms to 2018.

Procedure for Conformity of Production (CoP) in India has been made further stringent by Government in the year 2015 by bringing in several administrative changes for selection, shipping and testing of vehicles. Additionally, Government of India has also introduced a new procedure for selecting some vehicles from Dealers for emission testing.



Members of SIAM Emissions & Conservation Group during the 34th meeting at Trivandrum, Kerala.



(L to R) Mr S Arun, Head Homologation, Ashok Leyland, Mr Vishnu Mathur, DG, SIAM, Mr S Sandilya, Group Chairman, Eicher Motors, Mr J K Deb, Sr. Vice President, M&M and Mr P Panda, Vice President, Maruti Suzuki India Ltd during SIAM pre-meeting on Emission Roadmap.

Bureau of Energy Efficiency released the revised notification for implementation of Fuel Efficiency regulations for Cars in April 2015, thereby mandating the regulation from the year 2017 onwards, which would be further tightened in the year 2022. BEE has now initiated discussions to mandate Fuel efficiency labels for cars categories all cars sold in India from 1 Star to 5 Stars, which will be communicated to the consumers at large.

Ministry of Petroleum and Natural Gas (MoPNG) through Petroleum Conservation Research Association (PCRA) has initiated discussion to formulate regulation on fuel efficiency for heavy duty vehicles. Due to complexities involved in developing such a regulation, no specific direction has been given by Government of India presently.

Government of India is aggressively considering expanding the use of Bio-Fuels for Automotive purposes. Notification for Ethanol based fuel to run on E85 and ED95 was released in June 2015 and Government is in the process of finalizing the notification for use of Bio-Diesel. Bureau of Indian Standards (BIS) is also in the process of developing wide ranges of Bio-Fuel specifications. Presently a research is also underway at ARAI to ascertain if E20 can be used in existing gasoline vehicles and MoPNG is evaluating the possibility of using B20 in Diesel vehicles.

The National Green Tribunal (NGT) has been issuing several orders to address the issue of growing air pollution in the national capital. In November 2014, the tribunal ordered that all vehicles which are more than 15 years old would not ply in the national capital. National Green Tribunal is also considering directing that diesel vehicles that are more than 10 years old would not ply in Delhi. Presently strong enforcement measures

are being taken to check emission levels of trucks coming into Delhi from other States.

Gaseous Fuel

Two CNG Infrastructure Monitors were also released under this group. Meetings were also held with Mahanagar Gas Limited on CNG infrastructure across India including availability of CNG, spread of pipelines and Government policies on pricing in different cities. MGL informed there will always be a price differential between Gasoline, Diesel and CNG Fuel prices.

The group also organized a refresher course workshop on CNG safety. Dr Bhure Lal, Chairman, Environment Pollution (Prevention and Control) Authority (EPCA) graced the workshop as the Chief Guest. The workshop also brought together stakeholders from Petroleum and Explosives Safety Organisation (PESO), Indraprastha Gas Limited (IGL), SIAM members and Technology providers.



SIAM Delhi CNG Service representatives from Ashok Leyland, Mahindra & Mahindra, SML Isuzu, Tata Motors and VECV along with expert trainers at the CNG Awareness Workshop.



(L to R) Mr Ujjwal Bhandari, GM, IGL, Mr Vishnu Mathur, DG, SIAM, Dr Bhure Lal, Chairman, EPCA, Mr Atanu Ganguli, Sr. Director, SIAM and Dr B Singh, Controller of Explosives, Petroleum and Explosives Safety Organisation during the CNG Awareness Workshop



Capt N S Mohanram, Advisor, TVS Motor Company and Mr Amit Kumar Sharma, Associate Director, SIAM at the JAMA-ACEA Recycling Meeting in Tokyo, Japan.

Recycling

AIS-129 standard on the procedures for Recycling of Vehicles was finalized. CMVR Technical Standing Committee has cleared the standard and has also proposed to bring commercial vehicles in the ambit of regulation apart from M1 vehicles and Two Wheelers.

SIAM also attended the JAMA-ACEA Automobile Recycling Consultations in Tokyo in March 2015 to exchange information on prevailing recycling regulations in both regions. SIAM also participated at the Annual Conference of Global Organization of Recyclers "GARA" at Hokkaido in Japan in October 2014.

Infotronics

A two day National interactive workshop and a round table along with ASRTU was organized by SIAM Infotronics Group on "User Requirements for Interactive ITS

Architecture" on 26th February 2015 and 27th February 2015 in New Delhi. The main objective of the workshop was to capture overall user needs of STUs related to ITS architecture and to capture the detailed standard ITS user requirements for finalizing the National ITS policy. The workshop was attended by the delegates from STUs, OEMs and Test agencies and relevant members.

Diesel Image

SIAM Diesel Image Group organized its 5th Diesel conference on 2nd March 2015 at New Delhi. Senior Govt Officials, Industry representatives and Bureaucrats attended the conference addressing the need to recognize diesel as a viable solution for energy security and environmental consideration. Dr Pawan Goenka, Past President, SIAM and Executive Director & Group President - Auto & Farm Sector Mahindra & Mahindra Ltd



(L to R) Dr Abhay Firodia, Chairman, Force Motors, Mr Vinod Dasari, Vice President, SIAM, Mr Ambuj Sharma, Additional Secretary, MoHIL, Dr Pawan Goenka, Past President, SIAM and Executive Director & Group President – Auto & Farm Sector Mahindra & Mahindra Ltd and Mr Anant Talaulicar, CMD, Cummins India at the 5th SIAM Diesel Conference.



Mr Sanjay Bandopadhyaya, Joint Secretary, MoRTH addressing the gathering at the SIAM-ASRTU ITS Roundtable.



Mr Anoop Bhat, General Manager, Maruti Suzuki India Ltd and Mr IV Rao, Executive Advisor, Maruti Suzuki India Ltd at the 5th SIAM Diesel Conference.

Mahindra & Mahindra highlighted the progress made in the last 10 years on diesel image perception, its regulatory framework and impact on energy security etc. Discussions were also held on the importance of moving step by step from BS IV Emission Norms to BS V and then to BS VI Emission norms, to enable vehicle manufacturers and technology providers to develop technologies specific to Indian condition. Mr Ambuj Sharma, Additional Secretary, DHI, PCRA, BEE, Natrip, Scania Commercial Vehicles and Bosch also made presentations at the round table.

Two-Wheelers

Following the recommendations in the report of the expert Committee on Auto Fuel Policy, Ministry of Road Transport and Highways introduced a NOx limit for BS IV Emission norms for two wheelers. BS IV Emission norms will be introduced for new models from April 2016 onwards.

In order to enhance safety of two wheeler riders in the country, MoRTH actively considered introduction of Anti-Lock Braking System (ABS) in some categories of two wheelers. SIAM has highlighted that instead of ABS, there are other



(L to R) Mr Arvind Saxena, President & Managing Director, General Motors India Pvt Ltd, Mr Siddhartha Lal, Managing Director & CEO, Royal Enfield, Mr Vishnu Mathur, DG, SIAM and Mr Vikram Kirloskar, President, SIAM and Vice Chairman, Toyota Kirloskar Motor during the SIAM Meeting for Crash Regulations and Two Wheeler ABS

low cost options which would have a wider impact in improving safety and Government of India should consider such measures such as implementing Automatic Headlight-On (AHO) for Two Wheelers, side reflectors, etc. which would improve the conspicuity of two wheelers.

SIAM initiated an interaction with that GCC Standardization Organisation (GSO) representing eight countries in Gulf of discussing the new requirements for exporting two wheelers to Gulf region in June 2015. SIAM had also made a representation to Ministry of Commerce seeking support for export of vehicles



Mr Paul Jones, President, IMMA and Vice President, Harley-Davidson (2nd from Right – Front Row) along with IMMA Steering Committee members.



Members of the SIAM Two Wheeler Group during the 28th meeting at SIAM, New Delhi



Mr Harjeet Singh, Chairman, SIAM Two Wheeler Technical Group and Vice President, Hero MotoCorp with Mr Edwin Bastiaensen, Secretary General, IMMA at the IMMA Office in Geneva.

tested as per CMVR requirements. GSO has already commenced visits to some of the two wheeler manufacturing facilities for export in this region.

During the International Motorcycle Manufacturers Association (IMMA) Steering Committee meetings, detailed discussions were held on IMMA's Vision and Mission. It was suggested that each association would need to send a feedback on what are the expectations of the regions from IMMA. The IMMA vision and Mission will be crystallized over next one year. IMMA Technical groups also held detailed discussions on various emission testing procedures for the new regulations that are being formed under UNECE.

Three Wheelers

Government of India finalized the details and scheduled for implementation of BS IV Emission norms for Three Wheelers in discussion

with the SIAM Three Wheeler Technical Group. BS IV Emission norms for Three Wheelers will also be introduced from the year 2016 onwards for new models. SIAM Three Wheeler Group also met Transport Secretary in Chandigarh Administration regarding registration of BS III Three Wheelers.

International Harmonization

SIAM participated in the November 2014, March 2015 and June 2015 sessions of UNECE WP-29 meetings along with representatives of Government of India at Geneva. Discussions were held on various issues related to Harmonization of Motor Vehicle regulations. The subject of the possibility of India signing the 1958 Agreement, which calls for mutual recognition of regulations, was also discussed in this forum.

SIAM International Harmonization Group discussed on the nominations for six India GR working Groups under WP-29 viz GRRF, GRSP, GRE, GRPE, GRB & GRSG and members of this group participated in the 12 meetings of the sub-groups in Geneva, along with representatives of Government of India.

CMVR and Safety Regulations

The group discussed the various subjects for developing SIAM positions on National Ambulance Code, Fitment of ABS for



L to R) Mr Nitin Gokarn, CEO, NATRIP, Mr Sanjay Bandopadhyaya, Joint Secretary, MoRTH, Mr Vishnu Mathur, D.G, SIAM, Mr Ambuj Sharma, Additional Secretary, MoHIL, Mr Anil Shukla, Addl. Commissioner of Police (Traffic), Delhi and Mr. K K Gandhi, Executive Director- Technical, SIAM, at the SIAM Workshop on Prevention of Fire Incidences

Commercial Vehicles, National Permit Color Code, Deregulation items, Definitions of New and Existing Models, Bus Body Code etc.

This group also reviewed the issue of Fire Incidents in cars and collected data on the various causes of fires and reported the same to MoRTH and MoHI. A workshop was also organized on 24th September 2014 in New Delhi to discuss the steps taken by SIAM members along with the Government officials and other stake holders to minimize these incidences, thereby spreading awareness among general masses in preventing the fire incidences. This Group is also approaching relevant Ministries for radio frequency allocation for automotive applications.

National Green Tribunal had directed Central Pollution Control Board to develop Noise regulations for vehicles. SIAM submitted that vehicular noise is adequately addressed by current regulations and no further action is necessary in this regard. CPCB submitted an affidavit to NGT citing that vehicle manufacturers in India are currently meeting the noise regulations as per CMVR.

A draft Motor Vehicle Bill was introduced by Ministry of Road Transport and Highways in September 2014. Several comments were also given by SIAM on the Draft Bill, which was subsequently revised and presently the fifth draft version of the bill is under consideration. The bill essentially focuses at providing a scientifically planned and evolving framework for the safety of road users; developing a secure, efficient, cost effective and sustainable transportation system and delivering a sustainable, self-generating and socio-economic ecosystem. SIAM has submitted that the clauses related to Recycling of vehicles, Recall of vehicles and retro fitment needs to be rationalised for effective implementation.



(L to R) Mr Saurabh Rohilla, Deputy Director, SIAM, Dr S J Dhinagar, VP, Advance Engg., TVS, Mr Vishnu Mathur, DG, SIAM, Dr Tapan Sahoo, VP, Engg. and R&D, Maruti Suzuki India Ltd and Mr K K Gandhi, ED, SIAM during the launch of FAME India Scheme

Frontier Technology

The group continued its support to Govt. on the National Mission on Electric Mobility to finalize the scheme namely - FAME India - which was launched w.e.f 1st April 2015. Over the year, the group along with the Govt. also organized public awareness events to promote the scheme. The group was engaged with Govt. on various other important activities under this mission including R&D and Pilot Projects

On 8th April 2015, Department of Heavy Industry had organized first National Workshop on FAME India on the sidelines of launching the scheme for public consumption. The scheme 'FAME India' was launched officially by Hon'ble Minister of Heavy Industry.



(L to R) Shri S K Bahri, Additional Secy, MoHI, Shri Ambuj Sharma, Additional Secy, MoHI, Shri Anant Geete, Hon'ble Minister of Heavy Industry & Public Enterprise, Shri R S Katoch, Secy, MoHI at the launch of FAME India Scheme, at New Delhi



Hybrid & Electric Vehicle Rally being flagged off by Shri Prakash Javadekar, Hon'ble Minister of State, MoEF & Shri Anant Geete, Hon'ble Minister of Heavy Industry & Public Enterprise on the World Environment Day, at India Gate

On the World Environment Day - 5th June 2015 - SIAM along with Govt. organized a hybrid and electric vehicle rally inaugurated by Hon'ble Minister of Heavy Industry and

Hon'ble Minister of Environment, Forest and Climate Change at India Gate, New Delhi.

SIAM- JAMA Annual Meeting

SIAM-JAMA meeting for the year 2014 was hosted by SIAM on 30th & 31st of October 2014, at Goa. Experts from Japanese Automobile industry and Indian Automobile industry had a thorough discussion on various topics of environment sustainability, future emission norms, e-mobility and technologies on vehicular safety. Senior officials from the Ministry of Road Transport & Highways and Test Agencies also joined the meetings and were actively involved in the discussions on International Harmonization and Regulatory framework in India and Japan.



Mr Sanjay Bandopadhyaya, Joint Secretary, MoRTH (5th from Left – Front Row) with SIAM and Japanese Automobile Manufacturers Association (JAMA) Technical Members during the 9th (4W) & 4th (2W) SIAM-JAMA meetings at Goa, India.

PUBLIC POLICY



Celebration of World Environment Day on 5th June 2015 by 4750 Automobiles Dealers all across India

Celebrating World Environment Day on 5th June 2015

SIAM public policy initiatives are undertaken under SAFE which works with the support of members and their dealer's network to spread the message of Road Safety and importance of vehicle maintenance to improve air quality across the nation.

For spreading the message of road safety Ministry of Road Transport, Government of India consults SIAM for planning and

executing various activities across the nation with different stakeholders.

SAFE along with automobile manufacturers have undertaken various initiatives in the area of Road Safety and In Use Vehicle Management. To create awareness in this regard, following activities have been carried out by SAFE in 2014 - 15:

- *World Environment Day* on 5th June 2015
 - SAFE with SIAM members and dealers support organized 4700 free PUC check-up camps across India.



Mr K K Gandhi, Executive Director, SIAM addressing at the Workshop on Making Road Safety : Multi Sectorial Response at New Delhi



Road Safety Walk organised on 11th January 2015 at India Gate, New Delhi during National Road Safety Week 2015



Mr Oommen Chandy, Hon'ble Chief Minister, Mr Thiruvanchoor Radhakrishnan, Hon'ble Minister of Transport, Mrs R-Sreelekha, IPS, Transport Commissioner, Government of Kerala launching the Safety Initiatives by Indian Automobile Industry booklet at SAFE Annual Convention on 21st April 2015 in the presence of Dr N Saravanan, President, SAFE and Mr P K Banerjee, Vice President, SAFE.

- **National Road Safety Week January 2015** - Organised Road Safety programs at 4000 dealers premises across India. Conducted more than 75 refresher driver training program, 11 health checkup camps for heavy commercial vehicle drivers at different states.
- Various Road Safety drives for school teachers, drivers, students and citizens all over the country
- Refresher training program for Government and Corporate drivers
- Assisted other associations in implementing programs with students
- Participated in many important ministerial groups working in the area of Road Safety and In-use Vehicle Management
- Participation at various forums on Road Safety

Organised SAFE Annual Convention at Thiruvananthapuram, Kerala with the theme: **"Leapfrogging Road Safety : Way Forward"**. SAFE Annual Conference explored how the experience and knowledge of stakeholders from across the globe in the road maintenance and safety sectors can support informed decision-

making and policy development which will help improve road safety and efficiency.

All these activities were implemented under SIAM- SAFE joint banner with outstanding support received from SIAM members and their dealers, NGOs, Corporates, Ministries, State Transport Departments, Traffic Police, Pollution Control Boards, Educational Institutions and many more organizations.

SAFE aims to continue to spread the message of Road Safety and Cleaner environment towards meeting the goal of **'Zero Road Fatality'** due to road accidents and **'Minimal Environmental Impact'**.



Presentation of Road Safety Rolling Trophy by Mr B S Bassi, Commissioner of Police Delhi to Gyan Mandir Public School, Naraina Vihar, Delhi on 20 February 2015 at India Gate, New Delhi





SETTING UP OF VEHICLE INSPECTION CENTRE AT MADHYA PRADESH



SIAM is setting up a model Inspection & Certification Centre at Chhindwara at Madhya Pradesh for Ministry of Road Transport and Highways, Govt of India. Civil construction of the four lane Centres has been completed in all respect including design and construction of foundations for all the testing equipment to be installed in the centre. Ministry of Road Transport and Highways, Government of India had shortlisted M/s Rosemerta Technologies for supply of testing

equipment and operation of the vehicle Inspection Centre at Chhindwara and also at nine other upcoming Centres in different parts of the country. Equipment supplied by M/s VTEQ, Spain, for two heavy duty lanes and two light duty lanes, are presently being commissioned at site. Upon commissioning of equipment, M/s Rosemerta will commence testing of Commercial Vehicles in the region for issuance of fitness Certificate by the Regional Transport Authority.



OVERVIEW OF THE AUTOMOTIVE INDUSTRY 2014-15

Industry performance in 2014-15

Production

The industry produced a total of 23,366,246 vehicles including passenger vehicles, commercial vehicles, three wheelers and two wheelers in April-March 2015 as against 21,500,165 in April 2013-March 2014, registering a growth of 8.68 percent over the same period last year.

Domestic Sales

The sales of Passenger Vehicles grew by 3.90 percent in April 2014-March 2015 over the same period last year. Within the Passenger Vehicles segment, Passenger Cars and Utility Vehicles grew by 4.99 percent and 5.30 percent respectively, while Vans declined by (-) 10.19 percent in April 2014-March 2015 over the same period last year.

The overall Commercial Vehicles segment registered de-growth of (-) 2.83 percent in April 2014-March 2015 as compared to same period last year. Medium & Heavy Commercial Vehicles (M&HCVs) grew by 16.02 percent and Light Commercial Vehicles declined by (-) 11.57 percent.

Three Wheelers sales grew by 10.80 percent in April 2014-March 2015 over the same period last year. Passenger Carriers and Goods Carriers grew by 12.16 percent and 5.27 percent respectively in April 2014-March 2015 over April 2013-March 2014.

Two Wheelers sales registered growth of 8.09 percent in April 2014-March 2015 over April 2013-March 2014. Within the Two Wheelers segment, Scooters, Motorcycles and Mopeds grew by 25.06 percent, 2.50 percent and 4.51 percent respectively in April 2014-March 2015 over April 2013-March 2014.

Exports

In April 2014-March 2015, overall automobile exports grew by 14.89 percent over the same period last year. Passenger Vehicles, Commercial Vehicles, Three Wheelers and Two Wheelers grew by 4.42 percent, 11.33 percent, 15.44 percent and 17.93 percent respectively during April 2014-March 2015 over the same period last year.

Automobile Production Trends

Category	(Number of Vehicles)					
	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15
Passenger Cars	1,932,620	2,453,097	2,537,170	2,423,086	2,322,578	2,416,862
Utility Vehicles	272,883	313,142	370,945	568,538	568,692	629,255
Vans	151,908	216,533	237,954	239,434	196,703	174,055
Total Passenger Vehicles	2,357,411	2,982,772	3,146,069	3,231,058	3,087,973	3,220,172
M&HCVs	250,133	345,818	384,801	280,677	221,556	268,553
LCVs	317,423	414,917	544,335	551,972	477,479	428,530
Total Commercial Vehicles	567,556	760,735	929,136	832,649	699,035	697,083
Three Wheelers	619,194	799,553	879,289	839,748	830,108	949,021
Scooters	1,494,409	2,134,585	2,659,340	3,026,512	3,676,213	4,721,415
Motorcycles	8,444,857	10,510,189	11,982,669	11,925,690	12,474,626	13,023,210
Mopeds	571,070	704,575	785,523	791,954	732,210	755,345
Electric Two Wheelers	2,567	-	-	-	-	-
Total Two Wheelers	10,512,903	13,349,349	15,427,532	15,744,156	16,883,049	18,499,970
Grand Total	14,057,064	17,892,409	20,382,026	20,647,611	21,500,165	23,366,246

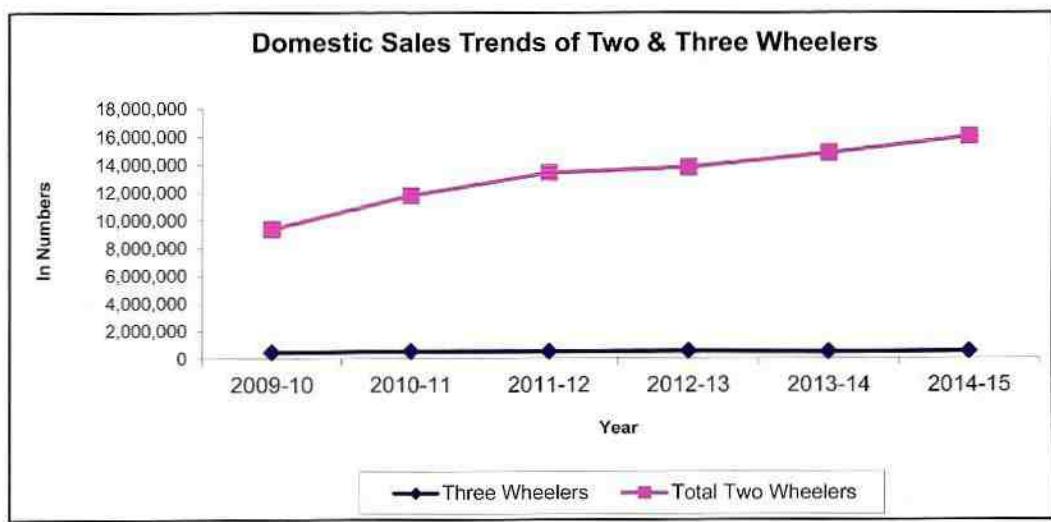
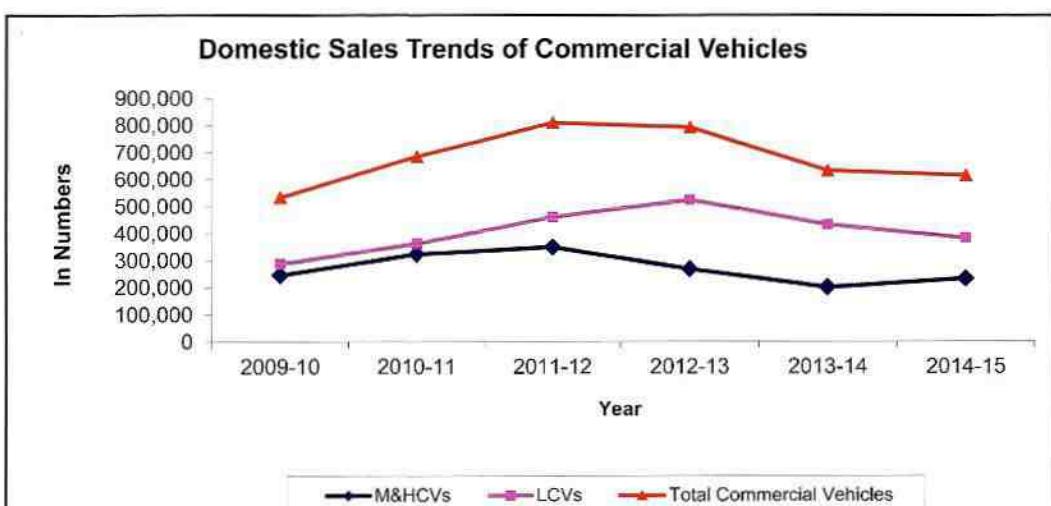
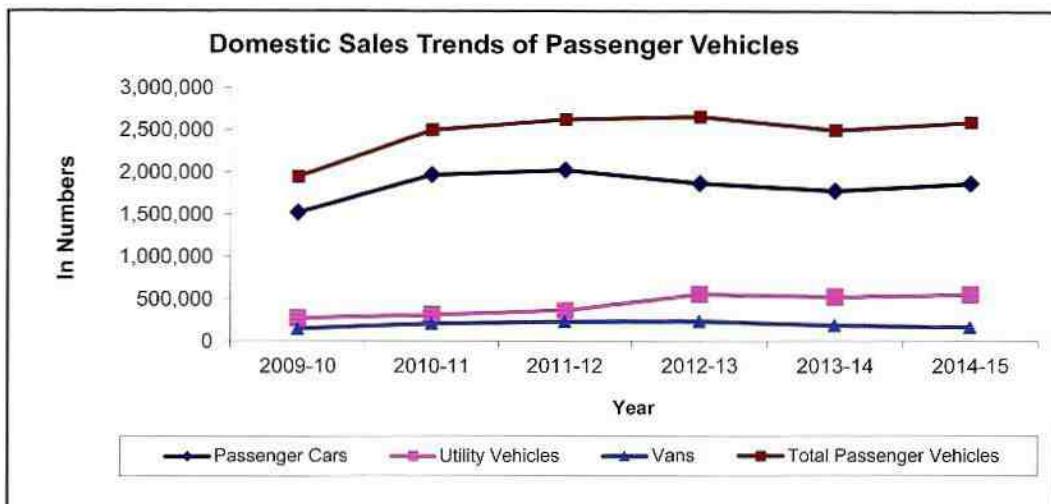
Automobile Domestic Sales Trends

Category	(Number of Vehicles)					
	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15
Passenger Cars	1,528,337	1,972,845	2,031,306	1,874,055	1,786,826	1,876,017
Utility Vehicles	272,740	315,123	363,772	553,662	525,839	553,699
Vans	150,256	213,574	234,761	237,298	190,844	171,395
Total Passenger Vehicles	1,951,333	2,501,542	2,629,839	2,665,015	2,503,509	2,601,111
M&HCVs	244,944	323,059	349,216	268,689	200,618	232,755
LCVs	287,777	361,846	460,283	524,522	432,233	382,206
Total Commercial Vehicles	532,721	684,905	809,499	793,211	632,851	614,961
Three Wheelers	440,392	526,024	513,281	538,290	480,085	531,927
Scooters	1,462,534	2,057,604	2,558,981	2,923,424	3,602,743	4,505,529
Motorcycles	7,341,122	9,013,888	10,073,303	10,085,000	10,481,115	10,743,549
Mopeds	564,584	697,418	776,866	788,761	722,920	755,503
Electric Two Wheelers	2,711	-	-	-	-	-
Total Two Wheelers	9,370,951	11,768,910	13,409,150	13,797,185	14,806,778	16,004,581
Grand Total	12,295,397	15,481,381	17,361,769	17,793,701	18,423,223	19,752,580

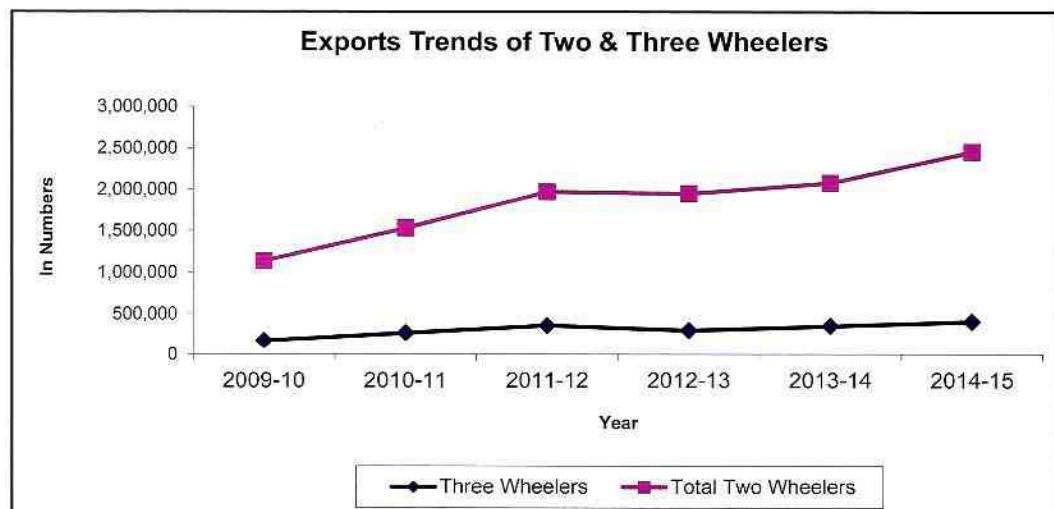
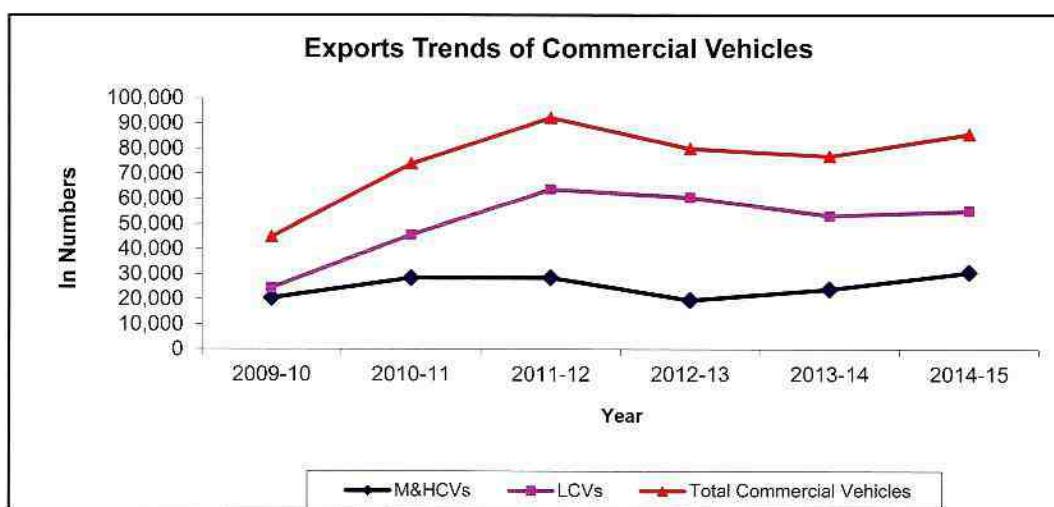
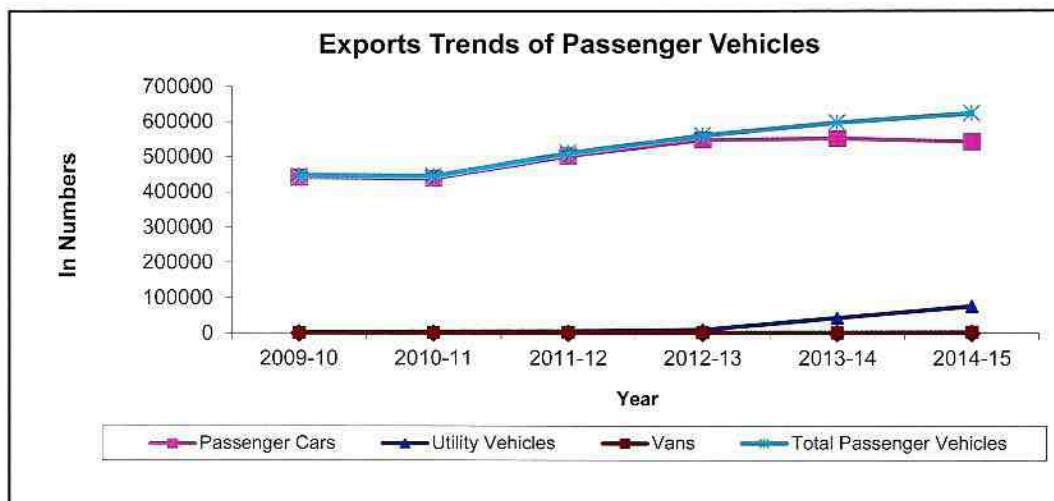
Automobile Exports Trends

Category	(Number of Vehicles)					
	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15
Passenger Cars	441,709	438,214	501,546	547,222	551,218	542,082
Utility Vehicles	2,823	3,746	5,221	10,423	43,433	77,024
Vans	1,613	2,366	2,016	1,769	1,491	3,364
Total Passenger Vehicles	446,145	444,326	508,783	559,414	596,142	622,470
M&HCVs	20,425	28,349	28,495	19,524	23,813	30,652
LCVs	24,584	45,694	63,763	60,503	53,237	55,130
Total Commercial Vehicles	45,009	74,043	92,258	80,027	77,050	85,782
Three Wheelers	173,214	269,968	361,753	303,088	353,392	407,957
Scooters	30,125	50,646	94,440	91,062	93,931	196,127
Motorcycles	1,102,978	1,474,678	1,871,595	1,862,008	1,982,817	2,251,791
Mopeds	6,905	6,295	9,076	3,308	7,252	9,679
Electric Two Wheelers	50	-	-	-	-	-
Total Two Wheelers	1,140,058	1,531,619	1,975,111	1,956,378	2,084,000	2,457,597
Grand Total	1,804,426	2,319,956	2,937,905	2,898,907	3,110,584	3,573,806

Domestic Sales Trends



Exports Trends



SIAM OFFICE BEARERS

SIAM Executive Committee 2014-2015

COMPANY	MEMBER	ALTERNATE MEMBER
Toyota Kirloskar Motor Pvt Ltd	Mr Vikram Kirloskar <i>President</i>	Mr Naomii Ishii
Ashok Leyland Ltd	Mr Vinod K Dasari <i>Vice President</i>	Mr Rajive Saharia
General Motors India Pvt Ltd	Mr Arvind Kumar Saxena <i>Treasurer</i>	Mr P Balendran
AMW Motors Ltd	Mr Anirudh Bhuwalka (Co-opted)	Mr A Ramasubramanian
Bajaj Auto Ltd	Mr Rajiv Bajaj	Mr R C Maheshwari
Cummins India Ltd	Mr Anant J Talaulicar	Mr Sandeep Sinha
Fiat India Automobiles Pvt Ltd	Mr Gurpratap Boparai	Mr Kevin Flynn
Ford India Pvt Ltd	Mr Nigel Harris	Dr. Shripad Bhat
Hero MotoCorp Ltd	Mr Pawan Munjal	
Hindustan Motors Ltd	Mr Uttam Bose (Co-opted)	Mr P Vijayan
Honda Motorcycle & Scooter India Pvt Ltd	Mr Keita Muramatsu	Mr V Sridhar
Honda Cars India Ltd	Mr Katsushi Inoue	Mr Raman Kumar Sharma
Hyundai Motor India Ltd	Mr Bo Shin Seo	Mr Rakesh Srivastava
Mahindra & Mahindra Ltd	Dr. Pawan Goenka (Co-opted)	Mr Ketan Doshi
Mahindra & Mahindra Ltd	Mr P N Shah	Mr Rajan Wadhera
Maruti Suzuki India Ltd	Mr Kenichi Ayukawa	Mr I V Rao
Mercedes- Benz India	Mr Eberhard Kern	Mr S M Kadlaskar
Piaggio Vehicles Pvt Ltd	Mr Ravi Chopra	
Renault India Pvt Ltd	Mr Sumit Sawhney	Mr Jatin Aggarwal
Royal Enfield (Unit of Eicher Motors Ltd)	Mr S Sandilya (Co-opted)	Mr Lalit Malik
Royal Enfield (Unit of Eicher Motors Ltd)	Mr Siddhartha Lal	Mr B Govindrajan
Tata Motors Ltd	Mr Ravi Pisharody	Mr Sushant Naik
TVS Motor Company Ltd	Mr K N Radhakrishnan	Mr M N Muralikrishna
Volvo Buses India Pvt Ltd	Mr V R V Sriprasad	
VE Commercial India Pvt Ltd	Mr Vinod Aggarwal	Mr G Sekar
Volkswagen India Pvt Ltd	Mr Mahesh Kodumudi	Mr Pankaj Gupta

As on 31st March 2015

COUNCILS & GROUPS 2014-15

A. COUNCIL ON INTERNATIONAL BUSINESS



Chairman: Dr Pawan Goenka
Executive Director & Group President – Auto & Farm Sector
Mahindra & Mahindra Ltd



Chairman: Mr Ketan Doshi
Vice President – New Business
Development, Mahindra & Mahindra Ltd



Co-Chairman: Mr Rahul Bharti
Vice President – Corporate Affairs,
Maruti Suzuki India Ltd



Chairman: Mr P N Shah
President & Chief Executive (Automotive)
Mahindra & Mahindra Ltd



Co-Chairman: Mr Rakesh Srivastava
Senior Vice President (Sales & Marketing)
Hyundai Motor India Ltd.

B. COUNCIL ON MARKET



Chairman: Mr Kenichi Ayukawa
Managing Director & CEO
Maruti Suzuki India Ltd

1. VEHICLE CLASSIFICATION, SALES REPORTING & ANALYSIS



Chairman: Mr Jnaneswar Sen
Senior Vice President (Sales & Marketing)
Honda Cars India Ltd



Co-Chairman: Mr Sanjeev Mahajan
Vice President (Exports),
VE Commercial Vehicles Ltd.

2. TRADE FAIRS GROUP



Chairman: Mr Arvind Saxena
President & MD
General Motors India Pvt Ltd



Co-Chairman: Mr Sanjeev Handa
General Manager (Marketing)
Maruti Suzuki India Ltd

3. LOGISTICS GROUP



Chairman: Mr Prem Verma
Chief Executive Officer,
TML Distribution Company Ltd
Tata Motors Ltd



Co-Chairman: Mr Raju B Ketkale
Vice President (Logistics),
Toyota Kirloskar Motor Pvt. Ltd.

4. CSR & COMMUNITY SERVICES



Chairman: Mr Naveen Soni
Vice President (Govt. Affairs & CSR),
Toyota Kirloskar Motor Pvt. Ltd.

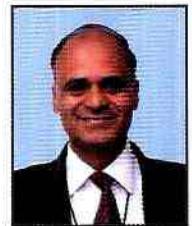


Co-Chairman: Mr Balachandar N V
Sr. Vice President - HR & Process
Excellence, Ashok Leyland Ltd.



Chairman: Mr Pankaj Narula
Executive Director (Service),
Maruti Suzuki India Ltd

5. SERVICE HEADS GROUP



Co-Chairman: Mr Rajesh Mukhija
Associate Vice President & Head (Services),
Hero MotoCorp Ltd.



Chairman: Mr Vijay Sethi
Vice President (Information Systems)
Hero MotoCorp Ltd

6. IT GROUP



Co-Chairman: Mr Bishwanath Ghosh
Chief Information Officer
Mahindra & Mahindra Ltd

C. COUNCIL ON ECONOMIC AFFAIRS



Chairman: Dr Abhay Firodia
Chairman
Force Motors Ltd



Chairman: Mr B B Parekh
Chief Purchase Officer,
Tata Motors Ltd

1. SOURCING GROUP



Co-Chairman: Mr Hemant Sikka
Chief Purchase Officer - Auto & Farm
Sector, Mahindra & Mahindra Ltd



2. ECONOMIC RESEARCH GROUP

Chairman: Mr Ranjit Yadav
President (PVB)
Tata Motors Ltd



Co-Chairman: Mr Manu Saxena
Sr. General Manager,
TVS Motor Company Ltd



3. TAXATION POLICY GROUP

Chairman: Mr Shekar Viswanathan
Vice Chairman
Toyota Kirloskar Motor Pvt Ltd



Co-Chairman: Mr P Balendran
Vice President & Director,
General Motors India Pvt Ltd



4. TAXATION PROCEDURAL GROUP

Chairman: Mr D D Goyal
Sr. Vice President (Finance),
Maruti Suzuki India Ltd



Co-Chairman: Mr Mohan Raghavan
Vice President (Excise)
Mahindra & Mahindra Ltd



5. DIRECT TAX

Chairman: Mr Anantharaman T
General Manager (Corp. Taxation & Govt. Affairs),
Mercedes-Benz India Pvt. Ltd.



Co-Chairman: Mr B C Datta
Assistant Vice President (Taxation)
Hyundai Motor India Ltd

6. FINANCE, LEASING & INSURANCE GROUP



Chairman: Mr Ajay K Seth
Chief Financial Officer,
Maruti Suzuki India Ltd



Co-Chairman: Mr Sudhanshu Verma
Head - Retail, Finance & Insurance
Tata Motors Ltd

7 HUMAN CAPITAL GROUP



Chairman: Mr Raman Kumar Sharma
Sr. Vice President & Director (General Affairs),
Honda Cars India Ltd



Co-Chairman: Mr Sanjay Singh
Head - HR (CVBU)
Tata Motors Ltd

8. ANTI COUNTERFEITING GROUP



Chairman: Mr Yashpal Sachar
General Manager (Parts),
Honda Cars India Ltd



Co-Chairman: Mr P S Bhumak
General Manager & Group Head (Mobis)
Hyundai Motor India Ltd

D. TECHNICAL COUNCIL



Chairman: Mr Mahesh Kodumudi
Managing Director,
Volkswagen India Pvt. Ltd.



Co-Chairman: Mr Sumit Sawhney
Managing Director,
Renault India Pvt. Ltd.



1. FRONTIER TECHNOLOGY GROUP, EV & HEV

Chairman: Dr Tapan Sahoo
Vice President (Engineering and R&D),
Maruti Suzuki India Ltd



Co-Chairman: Dr. S J Dhinagar
Vice President (Advanced Engg)
TVS Motor Company Ltd.



2. RECYCLING GROUP

Chairman: Capt. N S Mohanram
Consultant,
TVS Motor Company Ltd.



Co-Chairman: Mr Sanjeev Mandpe
General Manager (Product Homologation)
Mercedes-Benz India Pvt Ltd



3. DIESEL IMAGE GROUP

Chairman: Mr Anant J Talaunicar
Chairman & MD
Cummins India Ltd



4. GASEOUS FUELS GROUP

Chairman: Mr K D Singh
Vice President (Corporate Services),
Maruti Suzuki India Ltd

Co-Chairman: Mr Arun Sivasubrahmanyam
Head - Regulations & Homologations
Ashok Leyland Ltd.

5. AUTO INFOTRONICS GROUP



Chairman: Mr S Gopalakrishnan
Head - Vehicle Electronics & Product Development,
Ashok Leyland Ltd.

6. STYLING & DESIGN GROUP



Chairman: Mr Anil Saini
Director - Design,
General Motor India Pvt. Ltd



Co-Chairman: Mr Tarun Aggarwal
General Manager (Product Planning & Design),
Maruti Suzuki India Ltd

E. NATIONAL & INTERNATIONAL REGULATIONS COUNCIL



Chairman: Mr Vinod K Dasari
Managing Director,
Ashok Leyland Ltd.



Co-Chairman: Mr I V Rao
Executive Advisor,
Maruti Suzuki India Ltd



Chairman: Mr. J.K. Deb
Sr.Vice President
(Global Product Development) Automotive,
Mahindra & Mahindra Ltd

1. EMISSIONS & CONSERVATION GROUP



Co-Chairman: Mr P Panda
Vice President
(Engineering and R&D - Engines),
Maruti Suzuki India Ltd

2. CMVR & SAFETY REGULATIONS GROUP



Chairman: Mr S Ravishankar
Executive Advisor (Product Development),
Ashok Leyland Ltd



Co-Chairman: Mr Deepak Sawkar
Vice President,
Maruti Suzuki India Ltd

3. TWO WHEELERS GROUP



Chairman: Mr Harjeet Singh
Vice President (GRT),
Hero MotoCorp Ltd



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

4. THREE WHEELERS GROUP



Chairman: Mr S Sane
Senior Vice President (Engg and R & D)
Piaggio Vehicles Pvt. Ltd.



Chairman: Mr C V Raman
Executive Director (ERD),
Maruti Suzuki India Ltd

5. INTERNATIONAL HARMONIZATION GROUP



Co-Chairman: Mr P K Banerjee
Head (Homologation & Product Evaluation, ERC)
Tata Motors Ltd

F. COMMERCIAL VEHICLES CEOS COUNCIL



Chairman: Mr Ravi Pisharody
Executive Director (Commercial Vehicles),
Tata Motors Ltd

G. THREE WHEELERS CEO'S COUNCIL



Chairman: Mr Ravi Chopra
Chairman and Managing Director,
Piaggio Vehicles Pvt. Ltd.

H. TWO WHEELERS CEO'S COUNCIL



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

I. PASSENGER CAR CEO'S COUNCIL



Chairman: Mr Nigel Harris
President
Ford India Pvt. Ltd.

J. MUVS CEO'S COUNCIL



Chairman: Mr P N Shah
President & Chief Executive (Automotive),
Mahindra & Mahindra Ltd

K. SAFE - SOCIETY FOR AUTOMOTIVE FITNESS & ENVIRONMENT



President: Dr. N Saravanan
Senior Vice President, Head Engineering
Ashok Leyland Ltd



Vice President: Mr P K Banerjee
Head (Homologation & Product Evaluation, ERC)
Tata Motors Ltd

As on 31st March 2015

AIAM/SIAM 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 of India Ltd
1969	Mr A H Tobaccowala*	Tata Engineering & Locomotive Co Ltd
1970 & 1971	Mr A Sivasailam*	Simpson & Co. Ltd
1972 & 1973	Mr N K Firodia*	Bajaj Tempo Ltd
1974 & 1975	Mr J E Talaulicar*	Tata Engineering & Locomotive Co 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 Products of India Ltd
1982 & 1983	Mr R J Shahaney	Ashok Leyland Ltd
1984 & 1985	Dr V Krishnamurthy	Maruti Udyog Ltd
1986 & 1987	Mr S L Bhatte	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	Mr Brijmohan Lall	Hero Honda Motors Ltd
1997/98 & 1998/99	Mr V M Raval	Tata Engineering & Locomotive Co 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 of Eicher Motors)
2013/14 & 2014/15	Mr Vikram Kirloskar	Toyota Kirloskar Motors Pvt Ltd

* Since deceased

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

SIAM MEMBERS

1. Ashok Leyland Ltd
2. Atul Auto Ltd
3. AMW Ltd
4. Bajaj Auto Ltd
5. BMW India Pvt Ltd
6. Cummins India Ltd
7. Daimler India Commercial Vehicles Ltd
8. Fiat India Automobiles Pvt Ltd
9. Ford India Pvt Ltd
10. Force Motors Ltd
11. Foton Motors India Ltd
12. General Motors India Pvt Ltd
13. Greaves Cotton Ltd
14. Hero MotoCorp Ltd
15. Honda Motorcycle & Scooter India Ltd
16. Honda Cars India Ltd
17. Hindustan Motors Ltd
18. Hyundai Motor India Ltd
19. H D Motor Company India Pvt Ltd*
20. India Kawasaki Motors Pvt Ltd*
21. India Yamaha Motor Pvt Ltd
22. Isuzu Motor Company*
23. JCBL
24. Kinetic Motor Company Ltd
25. LML Ltd
26. Mahindra & Mahindra Ltd
27. Mahindra 2 Wheelers Ltd
28. Mahindra Reva Electric Vehicle Pvt Ltd
29. Maruti Suzuki India Ltd
30. Mercedes Benz India Pvt Ltd
31. Nissan Motor India
32. Piaggio Vehicles Pvt Ltd
33. Premier Ltd
34. Renault India Pvt Ltd
35. Royal Enfield
36. Scania Commercial Vehicles Ltd*
37. Scooters India Ltd
38. Simpson & Co. Ltd
39. SkodaAuto India Pvt Ltd
40. SML Isuzu Ltd
41. Suzuki Motorcycle India Pvt Ltd
42. Tata Motors Ltd
43. Toyota Kirloskar Motor Pvt Ltd
44. Triumph Motor India Ltd*
45. TVS Motor Company Ltd
46. VE Commercial Vehicles Ltd
47. Volkswagen India Pvt Ltd
48. Volvo Buses India Pvt Ltd

In alphabetical order

*Associate Member

As on 31st March, 2015

SIAM SECRETARIAT



Mr Amit Kumar

Mr Arindom Ghatak

Mr Arnab Chakraborti

Mr Atanu Ganguli

Mr B K Dutta

Mr Bhisham Prasad Rai

Mr Debasish Majumder

Mr Dhiraj V Chatap

Mr Dikshant Negi

Mr Dinesh Patnaik

Mr Diwit Prajapati

Mr Hardik Makhija

Ms Jasleen Kaur

Mr J S Cheema

Mr Jitendra Rai

Mr K K Gandhi

Mr Kartike Karwal

Ms Manju Dhamija

Mr Manoj Mohapatra

Ms Meenakshi Kukreja

Ms Novika Sood

Mr Philip Skaria

Mr R N Chakravarty

Ms Ragmani Shukla

Mr Raju Kamat

Mr Ramesh P Iyer

Ms Ritika Changia

Ms Ruby Ganguly

Mr Saurabh Rohilla

Mr Sugato Sen

Mr Sundeep Sundli

Ms Supriya Sinha

Mr Sushil Kumar

Mr Tribhuvan Rai

Mr V K Pandey

Mr Vishnu Mathur

In alphabetical order

LINKAGE WITH OTHER INSTITUTIONS IN INDIA

All India Motor Transport Congress
Alloy Steel Producers Association
Aluminium Association of India
Asian Development Bank
Association of Indian Forging Industry
Association of State Road Transport Undertakings
Automotive Component Manufacturers Association of India
Automotive Services Equipments Association
Automotive Skills Development Council (ASDC)
Automotive Tyre Manufacturers Association
Bureau of Indian Standards
Center for High Technology
Central Institute of Road Transport
Central Road Research Institute
Confederation of Indian Industry
Delhi Transport Corporation
Federation of Automobile Dealers Association
Indian Auto LPG Coalition
Indian Diesel Engine Manufacturers Association
Indian Institute of Foreign Trade
Indian Institute of Metals
Indian Institute of Petroleum
Indian Institute of Technology
Indian Machine Tool Manufacturers Association
Indian Rubber Institute
Institute of Road Traffic Education
Insurance Regulatory and Development Authority
International Centre for Automotive Technology
National Automotive Testing and R&D Infrastructure Project
National Council of Applied Economic Research, (NCAER)
National Institute of Design
National Skill Development Corporation (NSDC)
Petroleum Federation of India
Research & Information Systems for Developing Countries (RIS)
Society for Automotive Fitness & Environment (SAFE)
Technology Information Forecasting and Assessment Council
The Automotive Research Association of India
The Energy and Resources Institute
Tractor Manufacturers Association
United States Agency for International Development
Vehicle Research & Development Establishment
Western India Automobile Association

In alphabetical order

OVERSEAS LINKAGE

ASEAN Automotive Federation (AAF)
Asia Pacific Economic Cooperation Automotive Dialogue (APEC AD)
Aus Trade Commission, Australia
Auto Alliance, USA
Auto Trade Policy Council (ATPC), USA
Automotive Federation of Malaysia (AFM), Malaysia
Automotive Policy Planning, METI, Japan
Automotive Research & Testing Centre, Taiwan
Bangladesh Automobiles Assemblers and Manufacturers Association,
Ceylon Motor Traders' Association (CMTA), Sri Lanka
China Association of Automobile Manufacturers (CAAM), P R China
Clean Air Initiatives of Asian Cities (CAI-Asia)
Comité des Constructeurs Français d'Automobiles (CCFA), France
European Automobile Manufacturers Association (ACEA), Europe
Federal Chamber of Automotive Industry (FCAI), Australia
Federation of Asia Motorcycle Industries (FAMI), Singapore
Federation of Nepal Chamber of Commerce & Industry, Nepal
From Concept to Car
Fuels and Lubes Asia (F&L Asia)
Global Automotive Industry Dialogue (GAID)
Indonesia Automotive Federation
Indonesian Automotive Industry Association (GAIKINDO), Indonesia
Indonesian Motorcycle Industry Association, Indonesia
International Motorcycle Manufacturers Association (IMMA)
International Organization of Motor Vehicle Manufacturers (OICA)
Japan Automobile Manufacturer Association (JAMA), Japan
Japan Automobile Standards Internationalisation Centre, Japan
Korean Automobile Manufacturers Association (KAMA), South Korea
Motor Vehicle Manufacturers Association, Italy
Motorcycle and Scooter Assemblers and Distributors Association of Malaysia
National Alternative Fuel Training Consortium, USA
National Association of Automobile Manufacturers of South Africa (NAAMSA)
National Association of Vehicle Manufacturers (ANFAVEA), Brazil
National Highway Traffic & Safety Authority, USA
Nepal Auto Dealers Association, Nepal
Philippine Automotive Federation, Philippines
SAE International, USA
Singapore Motorcycle Trade Association, Singapore
Taiwan Transportation Vehicle Manufacturers Association, Taiwan
Thailand Automotive Institution, Thailand
The Indonesia Automotive Federation (FOI)
The Indonesian Motorbike Assemblers' Association (PASMI), Indonesia
The Society of Motor Manufacturers and Traders (SMMT), UK
The Thai Automotive Industry Association (TAIA), Thailand
Transport Research Laboratory, UK
UK Trade & Investment (UKTI)
US Department of Commerce, USA
US Department of Energy, USA
US Environment Protection Agency, USA
Verband der Automobilindustrie e.v. (VDA), Germany
Vietnam Register, Vietnam

In alphabetical order

SIAM

Society of Indian Automobile Manufacturers

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