

ANNUAL REPORT

2013
2014

SIAM
Society of Indian Automobile Manufacturers

SIAM

Society of Indian Automobile Manufacturers

ANNUAL REPORT 2013-14

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PRESIDENT'S MESSAGE



Dear Friends,

After almost 20 months of severe slowdown, the automotive industry has now started on a path to a slow but sure recovery. Aided by Excise Duty cuts on vehicles in the Vote-on-Account in February 2014 which were continued by the new Modi-led government, a marked improvement in the overall market sentiment, a slow but sure rebound in infrastructure development and mining activity, the auto industry saw a visible uptick from May 2014 onwards.

The highly resilient two wheeler segment had already recovered from a short slowdown it saw in 2013. From May 2014 onwards, the performance of passenger vehicles has also witnessed a sustained improvement, with a positive growth of 2.53% in the first four months of FY 2014 – 15. Two wheelers have grown by 13.70%. However, while the negative performance of the commercial vehicles segment has started somewhat reversing, the CV segment is still struggling to re-achieve strong positive growth. With footfalls returning into the showrooms and more and more buyers willing to convert enquiries into actual sales, the industry would hopefully return to a holistic and sustained growth by the end of 2014.

For SIAM the last two years have been hectic. Battling with an industry slowdown and working with government on finding potential remedies on one hand and addressing the need for enhancing technical parameters of safety and performance of vehicles on the other required a fine balancing act. The year saw many new safety and other regulations getting approved for implementation. The Fuel Efficiency Norms for passenger cars were notified by Ministry of Power in January 2014, but due to deficiencies in technical aspects and also the dates of implementation, SIAM asked for a revision in the notification which has been accepted by the government. The revised notification is expected to be issued shortly. Government also decided to set up safety rating system for cars built in India and work has started in real earnest to design the contours of the Bharat New Vehicle Safety Assessment

Programme. The same would be adopted on a voluntary basis from 2015 and Phase-I would be put in place from 2017. The work of notifying the frontal offset crash test and pedestrian safety has also made considerable progress with the nearing of the completion of the test facilities at NATRIP which are expected to be ready by early 2015.

SIAM continues to actively participate in the activities of UN WP-29 and provides technical inputs for formulation of GTRs, where significant contributions have been made by SIAM for developing the GTR on World Light Duty Test Cycle (WLTP).

The Auto Fuel Policy Committee also submitted its recommendations to government with clear roadmap for implementation of BS-IV emission norms in stages across the country and subsequently BS-V emission norms. These recommendations are awaiting final approval from the government. The new BS-IV emission norms for two wheeler were also notified during the year and BS IV emission norms for three wheelers have also been finalized and are expected to be notified in the coming months. In addition, proposals were discussed on extending ABS to all HCVs and bringing in ABS for two wheelers above 125 cc in line with Europe.

Road safety continued to be a focus area with SIAM and SAFE concentrating on disseminating road safety education by organising workshops, seminars, driver training programs, schools student awareness drives and regular interaction with international and national agencies on getting the latest information on road safety. For implementing these initiatives SAFE gets support from members and member's dealer network in spreading the message all across the country.

On the economic policy front, SIAM made its contributions in ensuring a conducive fiscal environment with the Excise Duty reduction on vehicles. The first Union Budget announced by the new government also set at rest the 2-year debate on Excise Duty valuation of passenger cars triggered by the Supreme Court judgment in the case of FIAT which has come as a great relief to the industry at large. SIAM continues to pursue its other major policy recommendation of installing an incentive based scheme for "Fleet Modernisation" which saw remarkable traction with policy-makers during the year.

Another major milestone this year was that the work of designing the incentive schemes for the National Mission for Electric Mobility (NMEM) was concluded. The comprehensive scheme called Faster Adoption and Manufacturing of Electric and Hybrid Vehicles (FAME) is now awaiting a final nod from the government before it gets dedicated to the nation. This will truly be a watershed event for the Indian automotive industry.

SIAM's involvement on the international front remained as dynamic as ever. The IAA Show in Frankfurt in September saw a senior level delegation from SIAM accompanying the Minister of Heavy Industries and Public Enterprises to Frankfurt. A senior level delegation from Ministry of Heavy Industries & Public Enterprises along with SIAM also visited Leipzig and Netherlands to gain from

their successful experiences in implementing programmes for electric and hybrid mobility along with other priorities such as Skill Development, End-of life, etc. SIAM continued its active participation at OICA and IMMA and participated in every meeting of both these international organisations.

The highlight of the year was the Auto Expo 2014, organised jointly by ACMA, CII and SIAM. For the first time the show was held in a two-venue format. The Auto Expo - Component Show 2014 continued its presence at the Pragati Maidan, New Delhi while Auto Expo - The Motor Show 2014 was organised at the India Expo Mart, Greater Noida, Delhi NCR. The two-venue format was an unqualified success with more than 5.6 lakh general visitors overcoming the +40 km distance to Greater Noida to visit the Motor Show, while more than 70,000 dedicated business, general visitors and buying delegations visited the Component Show at Pragati Maidan.

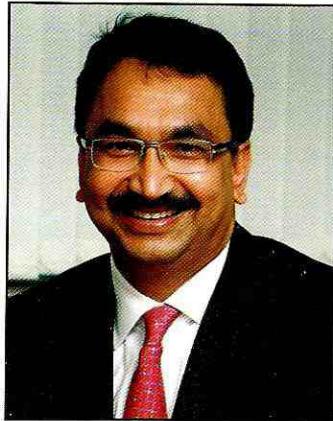
I take this opportunity to thank all our partners for the outstanding support during the year. The Minister of Heavy Industries and Public enterprises, our parent Ministry has always provided yeoman support to the auto industry. The Ministry of Road Transport & Highways and SIAM have been close partners in evolving the Safety and Emission roadmap for the country. I also thank ACMA and CII for the unstinted support to SIAM in all its activities.

As the Prime Minister says "acche din" are here for the country and for the industry. Rightly so, we dedicate this year's Annual Conference to the wide and deep economic linkages that the Auto Industry has and the role this industry has played in developed economies. We are poised to play the same role and together with all stakeholders, we will make it happen.

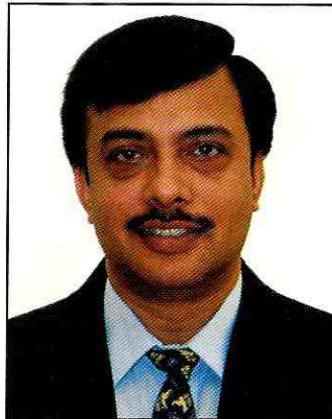
Vikram Kirloskar

Vikram Kirloskar

12th September 2014



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



Members at a SIAM Executive Committee Meeting



Mr Vikram Kirloskar, President, SIAM, Mr Vinod Dasari, Vice President, SIAM & Mr S Sandilya, Past President, SIAM 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, increasing 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 the 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.

SIAM works closely with the government and with international bodies such as International Organisation of Motor Vehicle Manufacturers (OICA), International Motorcycle Manufacturers Association (IMMA) and coordinates with other counterpart international associations such as Verband der Automobilindustrie e.v. (VDA), Germany, Japan Automobile Manufacturers Association (JAMA), Society of Motor Manufacturers and Traders (SMMT), Thai Automotive Industry Association (TAIA), Malaysian Automotive Association (MAA), ASEAN Automotive Federation (AAF), etc.

The society, jointly with ACMA and CII organises Auto Expo a widely awaited biennial auto exhibition showcasing the trends in the auto industry. Regional as well as segment specific shows are also organised by SIAM.

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

Mission

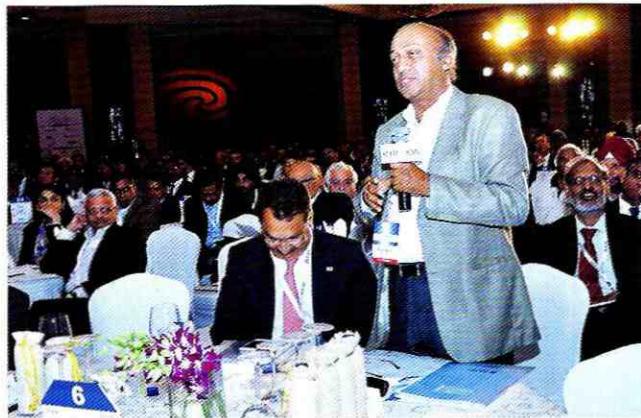
To become a growth engine of the Indian economy by propelling the Indian Auto industry to a global USD 145 bn industry by 2016 whilst promoting sustainability by addressing the multiple challenges arising out of emissions, climate change, energy independence and safety.

To achieve the mission, SIAM focused on several areas during the year 2013-14

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

SIAM 53rd ANNUAL CONVENTION

Contribution of Auto Industry in Economic Development



Dignitaries from the Government & Automobile Industry at 53rd SIAM Annual Convention 2013



Participants at the 53rd SIAM Annual Convention 2013

The Society of Indian Automobile Manufacturers (SIAM) organised its 53rd Annual Convention 2013 focusing on issues influencing Indian automotive industry's competitiveness, growth and its integration with the global economy and specifically on auto industry's contribution in economic development. A confluence of global automotive industry leaders, speakers and policy makers in the government, addressed the core issues and also discussed the possible solutions in all spheres.

The theme of this year's Annual Convention was 'Contribution of Auto Industry in Economic Development'

The leaders presented their perspectives on the following themes:

- Relevance of Auto Industry in Global Context
- Automobile: Connecting People & Services to enhance Quality of Life
- Contribution of Automobile Industry in Technology, Value Creation and Employment

- Perspectives on Importance of Auto Industry
- Industry Leader's Session

Mr S Sandilya, President, SIAM and Chairman, Eicher Motors Ltd - Unit Royal Enfield welcomed the Chief Guest and in his address spoke about the current scenario of automotive industry vis-à-vis a decade ago.

Mr Praful Patel, Hon'ble Minister of Heavy Industries & Public Enterprises, was the Chief Guest for this year's convention. Mr Patel



Chief Guest Mr Praful Patel, Hon'ble Minister of Heavy Industries & Public Enterprises, addressing the SIAM Annual Convention 2013

agreed that there is a strong case for a stimulus to the auto industry.

Mr Vikram S Kirloskar, Vice President, SIAM & Vice Chairman, Toyota Kirloskar Motor in his vote of thanks said, "We look upon the hon'ble minister of Heavy Industry as the guardian of the auto industry."



Mr S Sandilya, President, SIAM presenting the memento to the Chief Guest

In a special plenary entitled "Automobile: Connecting People & Services to Enhance Quality of Life" Dr Pawan Goenka, Past President, SIAM & President (Automotive & Farm Equipment Sectors), Mahindra & Mahindra gave the opening remarks followed by discussion on the session theme by Mr Ravi Kant, Past President, SIAM & Vice Chairman, Tata Motors, Mr Siddhartha Lal, Managing Director, VE Commercial Vehicles and Mr Chetan Maini, Founder & CEO, Mahindra Reva on how automobiles have helped and will help



Address by Mr Vikram S Kirloskar, then Vice President, SIAM

in future to improve quality of life. The session was summarized by Mr Anant J Talaubicar, Chairman & MD, Cummins India.

The session on Relevance of Auto Industry in Global Context commenced with the opening remarks by Mr Kenichi Ayukawa, Managing Director & CEO, Maruti Suzuki India. Mr Toru Asai, Director, Ministry of Economy, Trade and Industry, Japan said, that "The Japanese Automobile Industry employs 5.48 million people is the key industry in Japan and its driving forces greatly affect the Japanese economy. Any decline of this industry could also have serious adverse effect on local economy and national lifestyles."

Mr Georg Sticher, Senior Partner & Managing Director, Boston Consulting Group, Germany, said, that Auto Industry is important for the German economy. It provides 900,000 jobs that directly relate to automotive industry, which is 9% of the private sector in Germany, has an Investment of over 200 billion Euros and 16 billion Euros are spent on R&D in Germany employing 90,000 R&D professionals.

Mr David L Schoch, Group Vice President & President Asia Pacific, Ford Motor Company, said that thinking about automobile and its backward and forward linkages holistically we realize how important these inter-dependencies are around the world.



Speakers at Session-I – Special Plenary Session



Mr Toru Asai, Director, Ministry of Economy, Trade and Industry, Japan speaking at session on Relevance of Auto Industry in Global Context at SIAM Annual Convention 2013

Mr Shigeru Hayakawa, Chairman, JAMA International Committee & Senior Managing Officer, Toyota Motor Corporation, Japan talked about the priority issues of the Japanese Auto Industry.

Dr Goetz Klink, Head, Global Automotive Practice, A T Kearney, spoke in the session about the impact of the automotive industry and the contribution in generating government revenues. In the US, the tax revenue is 150 billion USD per year a massive amount of money for a government to invest. Foreign exchange earnings are also a very important contribution

and in countries such as Germany or Japan, 20% of their exports are from the automotive industry.

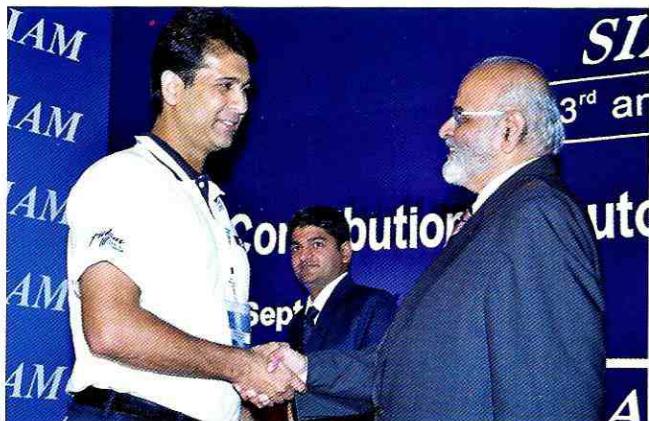
Mr Vikram Sirur, President, Indian Machine Tool Manufacturers' Association (IMTMA) Mr Som Mittal, President, National Association of Software and Service Companies (NASSCOM) and Mr A K Taneja, Past President, The Automotive Component Manufacturers Association of India (ACMA) spoke about the synergy between automobile industry and their industries.

During the panel discussion on Perspectives on Importance of Auto Industry Mr Pankaj Agrawala, Secretary, Ministry of Consumer Affairs elaborated on the logic and need of standardization and how standards help in making the right choice to meet varying needs of the consumers.

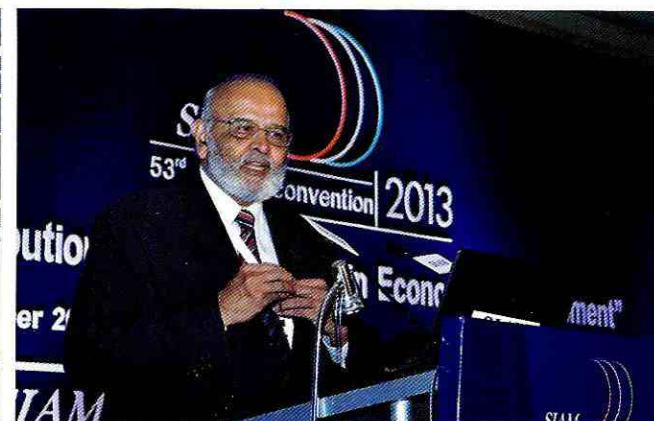
Dr Sudhir Krishna, Secretary, Ministry of Urban Development, spoke about evolution of the government policy on urbanization and mentioned that Mobility and Economic Activities have strengthened social interaction.



(L-R) Mr Siddhartha Lal, Managing Director, VE Commercial Vehicles, Mr Ajay Shankar, Member Secretary, National Manufacturing Competitiveness Council, Dr Sutanu Behuria, Secretary, Ministry of Heavy Industries & Public Enterprises, Mr Vinod K Dasari, Managing Director, Ashok Leyland, Dr Sudhir Krishna, Secretary, Ministry of Urban Development, Mr Pankaj Agrawala, Secretary, Ministry of Consumer Affairs



Mr Rajiv Bajaj, Managing Director, Bajaj Auto & Dr. Abhay Firodia, Chairman, Force Motors at the Industry Leaders Session



Dr. Abhay Firodia, Chairman, Force Motors

Dr Sutanu Behuria, Secretary, Ministry of Heavy Industries & Public Enterprises said that automobiles mean having mobility and this helps reduce transaction costs and increase value of the commodity because other markets open up, as demand of the product is not restricted to a local community but can be exported.

Mr Ajay Shankar, Member Secretary, National Manufacturing Competitiveness Council spoke about how the situation of the macro

levels of the economy or the depreciation of the rupee may actually be a great blessing for the sector because having a competitive exchange rate can make the value addition and manufacturing in India stronger.

In the Industry Leader's Session, Dr Abhay Firodia, Chairman, Force Motors addressed the gathering mentioning about the challenges that the automobile industry is facing and also various pointers on what can be followed to revive the industry.

AUTO EXPO - 2014

Auto Expo - The Motor Show

Auto Expo - Component Show



(L-R) Mr Vinnie Mehta, Director General, ACMA, Mr Chandrajit Banerjee, Director General, CII, Mr Rajive Kaul, Chairman, Trade Fairs, CII, Mr S Gopalakrishnan, President, CII, Mr Praful Patel, Hon'ble Minister of Heavy Industries & Public Enterprises, Mr Vikram S Kirloskar, President, SIAM, Mr Harish Lakshman, President, ACMA, Mr Vishnu Mathur, Director General, SIAM and Mr Rama Raman, Chairman & CEO, Noida & GNIDA during inauguration of Auto Expo - The Motor Show - 2014

SIAM, along with ACMA and CII, organised the 12th Auto Expo in February 2014. Due to paucity of space at Pragati Maidan, for the first time, a two-venue format was adopted: one venue for vehicles and the other for components. The Component Show was held at Pragati Maidan, New Delhi from 6th to 9th February, while the Motor Show was organised at India Expo Mart (IEML), Greater Noida, Delhi NCR from 7th to 11th February.

The new venue for the Motor Show covered 28,000 sqm of indoor air conditioned exhibition space and another 35,000 sqms of air conditioned exhibition halls were specially erected at the venue taking the total exhibition area to 63,000 sqmts.

Exhibitors at the Motor Show at IEML included 55+ companies and covered domestic vehicle manufacturers and also overseas participants who displayed more than 200 models of two/three wheelers and 300+ models of four wheelers which included passenger cars, MUV, SUVs and CVs

representing many breakthrough technologies and products for the Indian market.

The Component Show at Pragati Maidan saw participation from 1,100 auto-component and system/technology companies in the large, medium and small sectors. These were a big draw for the international and domestic OEMs and other business visitors.

Auto Expo - The Motor Show 2014 kicked off on 5th February 2014 which was an exclusive



IEML, Greater Noida, Venue of Auto Expo - The Motor Show 2014



(L-R) Mr Vikram S Kirloskar, President, SIAM, Mr Harish Lakshman, President, ACMA, Mr Praful Patel, Hon'ble Minister of Heavy Industries & Public Enterprises and Mr S Gopalakrishnan, President, CII during inauguration of Auto Expo - Component Show 2014

Media Day and saw overwhelming participation of over 1800 media persons from 20 countries. The media gave excellent reviews of the show both in terms of content and facilities.

The show was formally inaugurated at both the venues on 6th February 2014 by Mr Praful Patel, Hon'ble Minister of Heavy Industries & Public Enterprises.

The Motor Show saw as many as 70 new vehicle launches, which included 26 models that were unveiled globally for the first time. OEMs also launched 44 new vehicles for the domestic market.

The Component Show at Pragati Maidan also witnessed large number of new component level technology solutions being unveiled

The huge footfalls recorded every day at IEML, Greater Noida removed any apprehensions about its accessibility, which was aided by dedicated bus service organised specially for the show by SIAM from the nearest metro Station and also from Pragati Maidan mainly with the help of DTC. The Auto Expo - Motor Show saw an overwhelming response of more than 5.6 lakh visitors over the seven days and another 70,000 visitors at the Component Show at Pragati Maidan over four days.



Visitors at the Auto Expo - The Motor Show - 2014



Celebrities visit during launch of vehicles at Auto Expo - The Motor Show 2014



A view of the Auto Expo - Components Show - 2014

The show not only witnessed a record number of visitors at the India Expo Mart in Greater Noida, but was also a big hit on mobile too. For the first time, a new mobile app "Auto Expo '14" in its essence was designed to offer convenience to the visitors by providing updated information about the Motor Show on their fingertips. The official mobile app of the Motor Show witnessed thousands of downloads in less than a month of going live. Auto Expo - The Motor Show 2014's social media campaign also created a buzz on Facebook, YouTube and Twitter, with around 100,000 likes on Facebook, More than 3,000 followers on Twitter and above 20,000 views on the YouTube channel. The official website got more than 1 million hits from September 2013 – February 2014.

Several concurrent events, seminars and Conferences and special pavilions were held

during Auto Expo - The Motor Show 2014, which included SIAM Anti-counterfeiting Campaign, Auto Trade Dialogue, Automotive Design Challenge, Styling & Design Conclave, Vintage Car Display, Hybrid Electric Mobility World, Test Drive of Vehicles, Driver Training Programs and Safety Ride Programs, etc.

A special theme pavilion was also put up in partnership with Ministry of Heavy Industries and Public Enterprises, which conveyed key messages on the growing importance of electric mobility, displayed various types of xEVs and also provided an opportunity to the public to take a driving experience of these electric/hybrid vehicles.

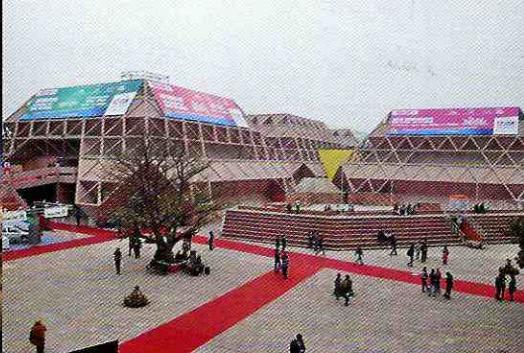
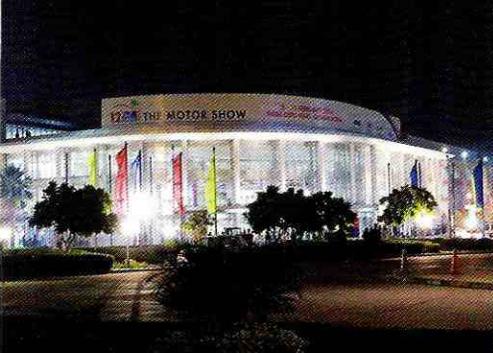
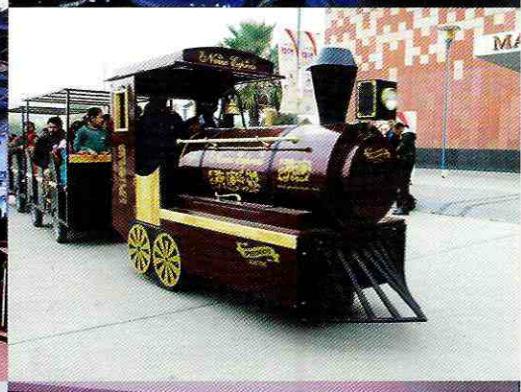
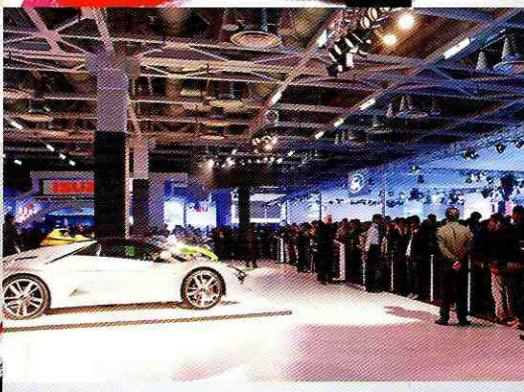
Thus, the Motor show proved to be a hugely popular and successful show both for the visitors as well as for the vehicle manufacturers.



Visitors at a stall in Motor Show - 2014



Visitors at the Component Show - 2014



ECONOMIC INITIATIVE



(L-R): Mr Sugato Sen, Dy. Director General, SIAM Mr Shekar Viswanathan, Vice Chairman & Whole Time Director Toyota Kirloskar Motor Pvt Ltd, Mr D D Goyal, Vice President (Finance), Maruti Suzuki India Ltd & Mr Mohan Raghavan, Vice President (Excise), Mahindra & Mahindra Ltd at the Taxation Group meeting



SIAM Members at the Pre Budget Meeting of the Taxation Group

SIAM Taxation Policy, Procedure and Direct Tax Groups

SIAM Taxation Policy, Procedure and Direct Tax Group are composed of the taxation and finance division heads of member companies.

The groups jointly met regularly to deliberate on the concerns faced by the industry and also share with each other the best practices within their organisations. High-level delegations from SIAM also met senior officials at the Ministry of Finance regularly to discuss various important, pending issues faced by the automobile industry.

SIAM taxation groups met in September 2013 in Goa to discuss the issues to be taken up in pre-budget memorandum. It was decided that the key policy suggestions that would be put forth to government would include the following:

1. Excise duty reduction in all segments, including abolishing newly introduced category of 30%.
2. Retain Customs tariff on all vehicle segment and increase tariff on commercial vehicles to 40%.
3. Request for suitable amendment to statute

on excise valuation in view of the FIAT decision in Supreme Court.

4. 1% NCCD on vehicles should be withdrawn.
5. Excise Duty & Custom Duty Concessions on Identified parts of Hybrid / EVs parts should be extended for a longer period instead of till March 2015.
6. Excise duty on all vehicles falling under HS 8702 with seating capacity of 10 – 13 persons should attract the same rate as buses.
7. Introduce GST across all states and share. Subsume all indirect taxes, including road tax, R&D Cess and Octroi, in the proposed GST to prevent cascading effect.
8. Depreciation rate for motor cars, MUVs and two wheelers, other than those used in the business of hire, should be raised to 25% from 15%.
9. Incentivize replacement of vehicles, which were registered before the year 2000 when the first emission norms were introduced.

The group also deliberated on service tax concerns and best practices followed in their companies.

For the long standing concern on the excise valuation issue, members suggested that SIAM should approach a senior legal consul and seek his advice on the next steps for a final solution to this issue. A SIAM team led by Mr Shekar Viswanathan met with Mr Harish Salve on November 16, 2013. Mr Sandeep Narain, Senior Partner and Advocate, Supreme Court of India at S. Narain & Co., represented as SIAM lawyer in the meeting. Mr Salve was given an update on the judgment and the subsequent requests made to Ministry of Finance and Central Board of Excise and Customs (CBEC).

Multiple representations were made on the excise valuation concern at different levels within the Ministry of Finance, including Finance Minister, Revenue Secretary, and Chairperson, CBEC. A view in the ministry also developed that a clarification in this regard is necessary to protect companies that have not done any wrong-doing. SIAM was requested to submit a few cases to the ministry that might be taken into consideration while issuing this clarification. SIAM had submitted a detailed note on the same. A clarification in this regard was issued on January 15, 2014 on the same, which was welcomed by the automobile industry.

Interim Budget 2014-15

In February 2014, Mr P Chidambaram, Hon'ble Finance Minister, announced the Interim Budget 2014-15. The Minister of Finance acknowledged the need for stimulus to get the automobile industry out from the slowdown being faced since the last two years and hence announced excise duty cuts across the segments for all categories of vehicles. A few key announcements in the budget included:

1. Excise duty for small cars, commercial vehicles, two-wheelers and three wheelers reduced from 12% to 8%.
2. Excise duty for cars and MUVs attracting 24% brought down to 20%.



SIAM Members at post budget meeting

3. Excise duty for cars and MUVs attracting 27% and 30%, reduced to 24%
4. Excise duty on engines reduced from 12% to 10%

SIAM thanked the Ministry of Finance for providing much needed relief to the auto industry. The relief from the excise duty cut was passed on to the customers through price reduction. This helped improve market to some extent and revive demand. The sales did not improve in the first two months (March and April); however, May 2014 onwards clear signs of recovery were visible.

The group met in March 2014 in New Delhi to discuss various service tax concerns as well as service tax concerns faced by the dealers. The members also discussed the clarification issued in the excise valuation issue (Supreme Court judgment in FIAT case). Members were appreciative of the clarification issued in this regard as much of the recommendations made by SIAM were covered in the clarification.

General Budget: Industry Consultation by Government of India

SIAM was invited by the Ministry of Finance to present their recommendations for the General Budget 2014-15 in May 2014. SIAM team was led by Mr S Sandilya, Past President - SIAM, in the meeting with Revenue Secretary. The key recommendations made were as given below:



Meeting of SIAM delegation with Mr Anant Geete, Hon'ble Minister of Heavy Industries & Public Enterprises

1. Continuation of the reduced excise duty rates.
2. Reduction in excise duty rates for components and parts falling under other key tariff headings (including 8707, 8708, 8714 and 4011).
3. Retain customs tariff on all vehicle segment and increase tariff on commercial vehicles to 40%.
4. Accelerated depreciation rate of 25% for motor cars.
5. Introduce GST across all states and share. Subsume all indirect taxes, including road tax, R&D Cess and Octroi, in the proposed GST to prevent cascading effect.
6. Depreciation rate for motor cars, MUVs and two wheelers, other than those used in the business of hire, should be raised to 25% from 15%.
7. Incentivize replacement of vehicles, which were registered before the year 2000 when the first emission norms were introduced.

SIAM was also invited by the Department of Heavy Industry to present the pre-budget recommendations in June 2014.

Mr Vikram Kirloskar, President, SIAM, along with senior people from the industry and secretariat paid courtesy visits to Ms Nirmala

Sitharaman, Hon'ble Minister of State, Ministry of Commerce and Industry (Independent Charge) and Ministry of Finance; Mr Nitin Gadkari, Hon'ble Union Minister, Ministry of Road Transport and Highways; Mr Anant Geete, Hon'ble Union Minister, Ministry of Heavy Industries and Public Enterprises. In all these meetings, emphasis was made to continue with the reduced excise duty rates to help industry revive from the slowdown.

SIAM Taxation Groups met in June 2014 in New Delhi to discuss on the concerns that need to be taken up with the Minister of Finance immediately. It was suggested that apart from continuation of reduced excise duty rates, the following issues be taken up with the ministry on a priority:

1. Demand of excise duty being raised on sales tax incentive earned by units working in Sales Tax Deferral scheme.
2. CENVAT credit on Input Service - Distribution mechanism.
3. Sec. 9A of the Central Excise Act granting power to arrest to the Central Excise Officers.
4. Extension of Sunset Clause period for investments made in hill states of Uttarakhand and Himachal Pradesh.
5. Payment of NCCD from CENVAT (finalise the draft circular issued in September 2012).

After submission of multiple representations by SIAM to Ministry of Finance, the ministry accepted the requirement for continuation of concessional excise duty on automobile products and released a notification to extend the excise duty concession until December 30, 2014.

Hon'ble Finance Minister Shri Arun Jaitley presented General Budget 2014-15 on July 10, 2014.

A few announcements that were favorable to the automobile industry are as follows:

1. In transfer pricing, range concept was introduced for determination of arm's length price. In addition, multiple year data for comparison and analysis was notified, instead of a single year as was earlier.
2. Legislative schemes for implementation of GST was announced.
3. Setting up of an Export Promotion Mission including state governments was announced - this is likely to address issues related to drawback and state taxes.
4. Development of 16 new ports projects.
5. ₹ 52,269 cr for road development.
6. Notification to address the issue of excise valuation concern.

The group met in July 2014 in New Delhi to discuss post-budget recommendations. Members discussed all concerns with regards to direct taxation and indirect taxation. It was felt that as details on international taxation are yet to be clarified submission on international taxation concerns would be taken up later. The other concerns that required immediate attention include the following:

1. Reduce the duty structure on select components for automobiles.
2. Utilizing CENVAT credit for payment of NCCD on automobiles.

3. Time limit for availing CENVAT credit on inputs and input services to be enhanced.
4. Automatic stay after mandatory fixed pre-deposit for filing appeals and interest on refund.
5. Roll-back of provision regarding higher interest rates on service tax dues.
6. Clarification regarding transfer of CENVAT credit to other units of similar products under LTU Scheme (amendment to Rule 12A(4) of the CENVAT Credit Rules, 2004).
7. Amendment to Sec 32AC of the Income Tax Act.

Economic Research Group

SIAM Economic Research Group met on many occasions to deliberate on studies that have been discussed and commissioned by them. SIAM Economic Research Group has commissioned many studies in the past.

The group successfully concluded the following studies:

1. Indian Trucking Industry - a study to understand the dynamics of the Indian Trucking Industry, including current trends and the trends expected in the future, evolution of the industry, regulations, demand patterns, value chain, operating environment, etc. Extensive meetings with transporters and OEMs were conducted for a deep-dive study of the industry.



SIAM Members at SIAM Economic Research Group meeting



(L-R): Mr Vishnu Mathur, Director General, SIAM, Mr Ambuj Sharma, Addl. Secretary, DHI, Mr Ranjit Yadav, President (PVBU) Tata Motors Ltd & Mr Sugato Sen, Dy. Director General, SIAM at the meeting of the SIAM Economic Research Group

- Impact of road and highway development on automobile demand – the study included review of the infrastructure development in the past and the expectation for the future. Analyzing the impact of highway development on automobile demand and the impact of rural road connectivity on automobile industry.
- Export Opportunity study for automobile industry – the scope of work for this engagement was to analyse tariff and non-tariff issues affecting Indian automobile exports (passenger cars, two wheelers, and commercial vehicles) to select countries that currently are key export destinations as well as to other countries where there is significant potential for exporting Indian vehicles in future.

The group is actively working on some of the on-going studies, which include:

- Automotive Mission Plan 2026
- Assessment of India's Manufacturing Competitiveness for Automobiles

The group continues to work upon improving the forecasting model for the Demand Forecasting exercise done by CRISIL.

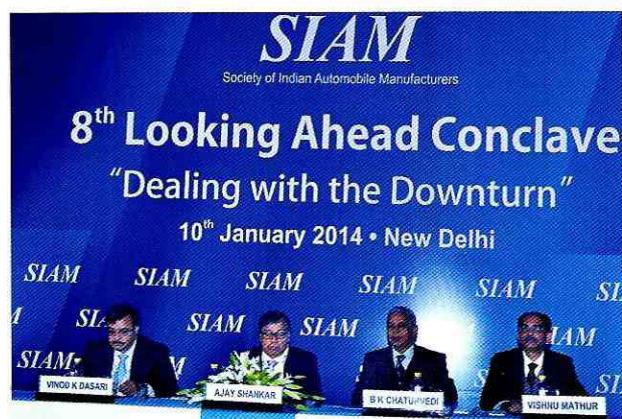
The group jointly with SIAM Exports Group worked on the Exports Opportunity study and the submission that was made to Ministry of Commerce & Industry.

8th SIAM Looking Ahead Conclave - Dealing with the Downturn - 10th January 2014; New Delhi

SIAM organised the "8th Looking Ahead Conclave - Dealing with the Downturn" on 10th January 2014 in New Delhi.

The conclave commenced with opening remarks from Mr Vinod Dasari, Vice President, SIAM & Managing Director, Ashok Leyland. The day witnessed interesting deliberations by industry experts from both commercial vehicle segment and personal vehicle segment.

The events during the day were divided into many sessions.



(L-R): Mr Vinod Dasari, Vice President, SIAM & Managing Director, Ashok Leyland, Mr Ajay Shankar, Member Secretary, NMCC, Mr B K Chaturvedi, Member, Planning Commission, Government of India & Mr Vishnu Mathur, Director General, SIAM at the 8th Looking Ahead Conclave

The conclave had the benefit of the views of eminent and senior government officers, and Industry stalwarts from India and abroad.



Mr B K Chaturvedi, addressing at the 8th Looking Ahead Conclave

The conclave was inaugurated by the Guest of Honor - Mr Ajay Shankar, Member Secretary, National Manufacturing Competitive Council (NMCC). The conclave saw participation from leading consultants such as CRISIL, Frost and Sullivan, and ICRA.

Trade Fairs group

SIAM, along with ACMA and CII, organised the 12th Auto Expo - 2014 in February, 2014 at India Expo Mart, Greater Noida, Delhi NCR and Component Show at Pragati Maidan, New Delhi. This event saw more than 6 lakh visitors and more than 1800 registered media persons at the two venues.



SIAM Members at SIAM Trade Fairs Group meeting

A separate chapter on the Auto Expo 2014, is given in this annual report.

The group also considered organising regional show in various cities of the country and



SIAM Members at SIAM Trade Fairs Group meeting

also International markets such as Sri Lanka, Myanmar and South Africa, etc.

Human Capital Group

During the year, the SIAM Human Capital Group worked constantly to help the industry develop improved human resources, through its activities. The group has been in constant touch with ACMA and FADA to jointly take up the Industrial Relations (IR) and other issues. The group is also working on the Gender Diversity issue related to more female participation in various aspects of auto industry activities / jobs.

Like the earlier years, the group initiated the comprehensive "Compensation & Benefits Benchmarking Study" which is being done by AON Hewitt. The study aims at understanding and benchmarking reward trends in the automobile industry and offers a unique platform for organisations to interact and share knowledge and insights on their compensation models.

Members of the group are actively supporting activities being carried out by Automotive Skills Development Corporation (ASDC) during the year. The group also decided that full day workshops on National Occupational Standards (NOS) would be conducted across the country with one workshop in each zone - north (NCR), west (Pune), south (Chennai).



SIAM Members at SIAM Human Capital Group meeting



SIAM Members at SIAM Human Capital Group meeting

The group has also decided to conduct a "Remuneration Survey for Indian Auto and Auto Ancillary Industry". Employers' Federation of India (EFI) will be conducting the Survey. The survey will provide valuable information to the participating organisations for developing remuneration structure. The survey will also help organisations to have competitive wage structures to get maximum mileage from payroll expenses. Having been supported by SIAM and the EFI, this survey is aimed and intended to be more credible and reliable, and become the most significant basis for company managements to take wage and personnel policy related decisions, with more certainty and conviction. The survey includes data collection, compilation, analysis and report generation.

The group also plans to organize the 3rd edition of SIAM HR Conclave in the year 2015.

Anti-Counterfeiting Group

SIAM Anti-Counterfeiting Group ran an awareness drive campaign during Auto Expo - The Motor Show 2014. A dedicated website of "SIAM Fighting Fake" was created for informing the masses about the drive, blogs, activities etc. being managed by SIAM.

Online campaign was also conducted through social networking websites such as Facebook and Twitter. SIAM received thousands of posts and likes on the social media.



SIAM Members endorsing Anti Counterfeiting Merchandise during Auto Expo - The Motor Show

Several activities such as painting competition for school students, digital interactive kiosks for visitors for slogans for promoting use of genuine parts only and a theme based group dance were conducted for spreading the message to the masses through various media.

There was a good media coverage of the SIAM initiative against Counterfeiting.

Logistics Group

The SIAM Logistics Group is handling the issues in the inbound and outbound logistics of SIAM member companies. The group deliberates on all aspects pertaining to inbound as well as outbound logistics. It deliberates on logistics issues connected with transportation by road, rail as well as waterways.

The group also organises the Logistics Conclave. The next edition of which is slated to be held in 2015.



Trial of loading of Cars on upper deck of the new Auto wagon in Titagarh



A view of the adjustable upper deck of the Auto Wagon

The group has been actively persuading the Indian Railways to develop policies etc facilitating rail transportation for automobiles. Railways have since announced the Automotive Freight Train Operators Policy. The RDSO has developed a dedicated, adjustable floor, Auto Car Wagon BCACBM.

In successful culmination of the sustained efforts of SIAM Logistics Group to introduce rail transportation of finished vehicles, the first railway auto wagon rake owned by Maruti Suzuki India Ltd was flagged off by the Chairman Railway Board at the Maruti Plant, Gurgaon.

Another design of auto wagon has been developed by a private wagon manufacturer. A delegation of the Logistics Group members visited the wagon factory manufacturing both these designs to review the design vis-a-vis suitability to carry various vehicle models and found them to be satisfactory.



Mr Sugato Sen, Dy. Director General, SIAM, Mr MM Singh, COO - Production, Maruti Suzuki & Mr Prem Verma, CEO, TML Distribution Company, Tata Motors at the SIAM Logistics Group meeting

Practical loading and unloading of cars and two wheelers were watched by members.

With these developments, the phase of introducing railway auto wagon rakes is now complete, and now needs to be exploited by members.

Sourcing Group

SIAM Sourcing Group deliberates on certain aspects pertaining to strategic sourcing of inputs for the OEMs.

The group met several times during the year and also had joint meetings with the ACMA OEM committee to deliberate on common issues, such as regulations, data exchange project, identification of gaps in technology, projections



Mr B B Parekh, Chief Purchase Officer, Tata Motors Ltd
Chairing SIAM Sourcing Group meeting

for vehicle production and the need to commission a study on Automotive Ferrous Castings.

The group also brings out the Commodity Price Monitor based on published data.

SIAM participates in the deliberations regarding formulation of steel standards and putting forth Automotive industry's concerns on mandatory BIS marking of steel.

SIAM also participates in the Interministerial Committee deliberating on exemption to Auto OEMs from mandatory BIS marking on automotive tyres and tubes.

SIAM Sourcing Group takes overseas delegations to check out latest technology and

materials. A SIAM delegation visited the China Auto Parts Expo 2013 which was held in Beijing from 13th to 15th September, 2013 in China and made a presentation about the automotive industry in India and prospects of exporting to India.

A delegation of the SIAM Sourcing Group also visited the Thailand Auto Parts & Accessories show 2014 (TAPA) in Bangkok.

Service Heads Group

The group has periodic interaction to share best practices amongst SIAM members, including use of more energy efficient vehicle servicing technologies.

International Relations Group

SIAM International Relations Group organised the Auto Trade Dialogue on 4th February 2014 in Greater Noida. The event saw participation from senior government officials and international organisations such as CAAM, JAMA, SMMT, KAMA and AFM Malaysia.

A high-level JAMA delegation participated in the SIAM Annual Convention last year in

September 2013. The delegation was led by Mr Shigeru Hayakawa, Chairman, JAMA International Committee & Senior Managing Officer, Toyota Motor Corporation, Japan. SIAM had also organised a visit for the delegation to Maruti Suzuki Plant in Gurgaon, JAMA and SIAM team were also invited for lunch with Japanese Ambassador at the Embassy of Japan.

A meeting was held between JAMA and SIAM in which discussion on current status of the industry, changes in policies and trade agreements being discussed globally were discussed.

SIAM - JAMA secretariat level meeting was also held in February 2014 in Kolkata. JAMA team was headed by Mr Yoshiyasu Nao, President, JAMA and SIAM team was headed by Mr Vishnu Mathur, Director General, SIAM. The meeting exchanged views on the following:

- Market trend of automotive sector
- Government's approach for stimulating demand of automobiles (SIAM)
- Recent trends of automobile industry policy



SIAM and JAMA delegation with H.E. Mr Takeshi Yagi Ambassador, Embassy of Japan in India



Mr Sugato Sen, Dy. Director General, SIAM addressing the participants at APEC Automotive Dialogue

- Outline of FTA/EPA development
- Environmental issues
- Technical issues

JAMA team was also taken for a city tour on the maiden visit of their President to Kolkata.

The first meeting of CAAM, JAMA, KAMA and SIAM also took place in February 2014, alongside Auto Expo 2014. The meeting set the agenda for the joint meetings of the four associations in the future.

China Auto Forum 2014

SIAM was invited to participate in China Auto Forum 2014 organized by China Association of Automobile Manufacturers (CAAM), held

at Beijing, China in April 2014. SIAM was represented by Mr Sugato Sen, Deputy Director General, SIAM.

He made a presentation on the "Development of Indian Auto Brand" at the forum.

SIAM Auto Trade Dialogue

SIAM International Relations Group organised the Auto Trade Dialogue on 4th February 2014 in Greater Noida.

The event saw participation from senior government officials and international organisations such as CAAM, JAMA, SMMT KAMA and AFM Malaysia.

Mr Ketan Doshi, Chairman, SIAM Trade Policy Group & CEO - NADPL & NBS, Mahindra & Mahindra presented the current status on auto policy and market trends to the participants.

Dr. Surajit Mitra, Director, Indian Institute of Foreign Trade presented his views on trade and the current trends in trade of major economies.

The sessions were addressed by international experts including the chiefs of automotive industry bodies of Malaysia (AFM), Korea, China, Canada, Japan and UK, who made



Mr A S Puri addressing at the SIAM Auto Trade Dialogue

presentations on the current auto policy and market trends in their countries.

Exports Group

SIAM Exports Group was involved in providing inputs for Foreign Trade Policy 2014-15. The key suggestions made to Director General Foreign Trade are as below:

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

SIAM was requested for data for calculation of the All Industry Rates (AIR) of Duty Drawback for the year 2014 by Drawback Committee, which was collected from the members and submitted to the committee.

The group met in July 2014 to discuss the Export Opportunity Study and for a discussion with EXIM Bank to understand the support they could provide to Indian automobile industry in enhancing exports. The Export Opportunity study was well received and suggestions were made to make it more comprehensive. A few suggestions made by EXIM Bank representatives were as under:

1. SIAM should request for a dedicated Line of Credit for Automobiles.
2. SIAM should request for the Line of Credit option being available only to OEMs as supply through aggregators, who do not have the expertise to provide after sales service, creates negative brand image in the exports markets.
3. EXIM Bank would support SIAM by supplying information on any tender floated for vehicle procurement through such Lines of Credit.
4. EXIM bank also has branches in other locations and has suggested that they will support the industry by informing about any tender being floated for procurement of vehicles in future.

A delegation of a few Export Group members met the Commerce Secretary in August 2014 to suggest measures for enhancing exports of vehicles from India. Commerce Secretary was appreciative of the findings of the study and made specific suggestions in respect of some key markets. He noted all the suggestions and assured full support of the ministry.

Trade Policy Group

SIAM Trade Policy Group was also engaged in providing feedback to Ministry of Commerce & Industry on various bilateral talks, Comprehensive Economic Partnership Agreement (CEPA), Comprehensive Economic Cooperation Agreement (CECA), etc. SIAM continued to maintain its stand to keep the items as suggested in the negative list of items during negotiations of crucial trade agreements with European Union and for Regional Comprehensive Economic Partnership (RCEP) agreement in discussion.

SIAM was also a part of the government delegation that visited Slovakia for participation in the meeting of Indo-Slovak Joint Economic



Mr. Vikram S. Kirloskar, President, SIAM & Mr. Vishnu Mathur, Director General, SIAM addressing the media

Cooperation and CII delegation to Pakistan to participate in Indo-Pak Joint Working Forum for improving economic cooperation between the two countries.

The group also explored the possibility of inclusion of automobiles in FTAs with complimentary and non-competing target markets for exports.

Finance, Leasing & Insurance Group

SIAM Finance, Leasing & Insurance Group deliberates on matters concerning finance and insurance related matters. SIAM held a meeting with General Insurance Corp for Vehicle insurance data reporting.

The group was concerned about the Supreme Court Judgment in the Excise Valuation matter. Due to consistent efforts of SIAM Taxation Groups and SIAM Finance, Leasing & Insurance Group, the matter has been addressed in the General Budget 2014-15.

SIAM is also exploring leasing opportunity in the taxi fleet to increase acceptance of electric and hybrid vehicles in India. This will also improve penetration of electric/hybrid vehicle in the country's vehicle fleet.

Vehicle Classification, Sales Reporting & Analysis Group

The Group is chaired by Mr Jnaneswar Sen, Sr. Vice President (Sales & Marketing), Honda Cars India and co-chaired by Mr N K Rattan



Members at SIAM Vehicle Classification Group meeting

COO, Tractor Business and President (Corporate sales & Marketing) Force Motors Ltd.

Vahan Project

The Ministry of Road Transport and Highways (MoRT&H) has initiated the Vahan project with an aim to digitise the vehicle registration data, across the country. This project will be executed in four steps, involving multiple stakeholders, such as test agencies, automobile OEMs, dealers and RTOs. MoRT&H and NIC organised a workshop to demonstrate the working of the Vahan Homologation portal and informed the Automobile industry that the first step of the project has been completed, i.e. uploading of all the Homologation Certificate Data by the test agencies. OEMs will upload the engine number, chassis number, colour, month and year of manufacturing. In the third step, dealers will upload customer data, and lastly, RTOs will issue the registration number. Ministry to issue draft notification shortly and proposes to make it mandatory starting 1st October 2014, for new vehicle registration through the Vahan portal only.

Styling & Design Group

SIAM Styling & Design Workshops

The group organised several Regional Design Workshops in different parts of the country. These events saw participation from automobile industry, academia (students and professors), etc. The objective of these workshops was to bridge the gap between industry and academics, and expose students to various aspects/concepts of automobile design.

SIAM Styling & Design Conclave, 7th February, New Delhi

SIAM organised the 8th Styling & Design Conclave and Automotive Design Challenge'13 in New Delhi. The theme for the conclave was



(L-R): Mr Tarun Aggarwal, General Manager, Product Planning & Design, Maruti Suzuki India Ltd, Mr Pankaj Jhunjha, General Manager - Design Tata Motors Ltd & Mr Ian Callum, Head of Design, Jaguar Cars at the SIAM Styling & Design Conclave



Dignitaries at the SIAM Styling & Design Conclave

"Emerging Markets: Creating Value through Design". The day long annual conclave showcased country's potential in becoming a global automobile styling and designing hub, and served as a platform for industry stalwarts and students to exchange ideas, concepts and role of design in building and sustaining brands.

The event was graced by eminent national and international speakers



First prize winner of ADC 2013 - Mr Vinay Raj (left) receiving the prize from Mr Axel Breun, Design Director - Renault Cars

Automotive Design Challenge (ADC) 2013

SIAM organised Automotive Design Challenge (ADC) last year. More than 150 students participated in the competition, out of which only 10 made it to the last round, and top 3 students, all from DSKISD, Pune, won the awards.

A jury consisting of eminent automobile designers, judged the student entries, on several parameters. ADC is an annual competition organised by SIAM.

Automotive Design Initiative Study

The Styling & Design Group of SIAM and Ministry of Heavy Industries Public Enterprises have jointly proposed to conduct a study to understand the skill gap in India in the area of transportation design. The SIAM group felt that the quality of students being produced by design institutes is not sufficient to meet the industry's requirements. This study will also benchmark Indian design institutes vis-à-vis global design institutes on several parameters and will also recommend possible solutions to overcome challenges. The study will be kicked off very soon.

INTERNATIONAL ENGAGEMENTS

20th APEC Automotive Dialogue - Beijing, People's Republic of China, April 23-25, 2014

The 20th meeting of the APEC Automotive Dialogue (AD) was held in Beijing, People's Republic of China, on April 23-25, 2014. The meeting was attended by government



SIAM delegation at the APEC meeting, at Beijing China

and industry representatives from China, Indonesia, Japan, Korea, Malaysia, the Philippines, the Russian Federation, Chinese Taipei, Thailand, the United States of America and Vietnam; SIAM participated in the meeting as a guest.

The delegates of the participating countries deliberated on the market situation in respective countries, the status on market access / FTAs and regulation and standards.

SIAM presented the fuel efficiency regulation for cars in India which would be implemented in two stages over a period of 10 years with effect from 1 April, 2016. SIAM also presented National Electric Mobility Mission Plan (NEMMP 2020) of the Government of India which envisages putting on the road 6 to 7 million EVs by 2020.

International Motorcycles Manufacturers Association

Mr Paul Jones, USMMA takes over from Mr S Sandilya, SIAM, as IMMA President 2014-16

During the 2014 General Assembly held in Bangalore on 7th May 2014, Mr Paul J. Jones, Vice President, General Counsel and Secretary of Harley-Davidson, USA representing United States Motorcycle Manufacturers Association (USMMA) was elected unanimously as the President of IMMA. Immediate Past President, Mr S Sandilya, SIAM had taken over as IMMA President in 2012. During Mr Sandilya's tenure significant achievements were made. The Road Safety Working Group launched an IMMA publication on "The Shared Road to Safety" during the General Assembly, which was an effort of last two years by the IMMA Road Safety Task Force.



Delegates during IMMA General Assembly 2014, Bangalore

TECHNICAL INITIATIVE

TECHNICAL COUNCIL

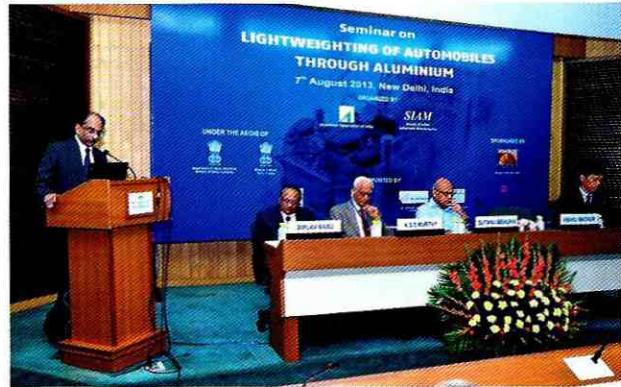
The Technical Council is chaired and co-chaired by Mr Vinod Dasari, MD, Ashok Leyland Ltd and Mr Marc Nassif, Managing Director, Renault India Pvt Ltd, respectively. The council reviews and discusses the activities related to groups on Frontier Technology, EV & HEV; Diesel Image; Automotive Infotronics; Styling & Design; Recycling and Gaseous Fuel and provides top level inputs on issues of national importance.

Frontier Technology Group, EV and HEV

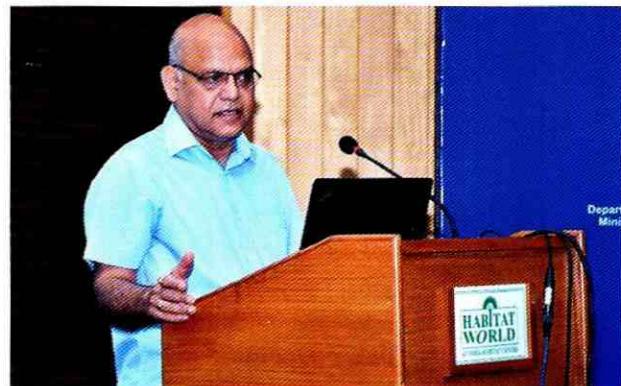
The Group is chaired by Dr Rao Chalasani, Director AVDC General Motors and is Co-Chaired By Dr Tapan Sahoo, Vice President Maruti Suzuki India Ltd. The group works on roadmaps for new technology initiatives such as electric hybrid and electric mobility, fuel efficient technologies, etc.

Seminar on Light Weighting of Automobiles Through Aluminum, 7th August, 2013, New Delhi

SIAM Frontier Technology Group along with Aluminum Association of India, jointly organised a seminar on "Light Weighting of



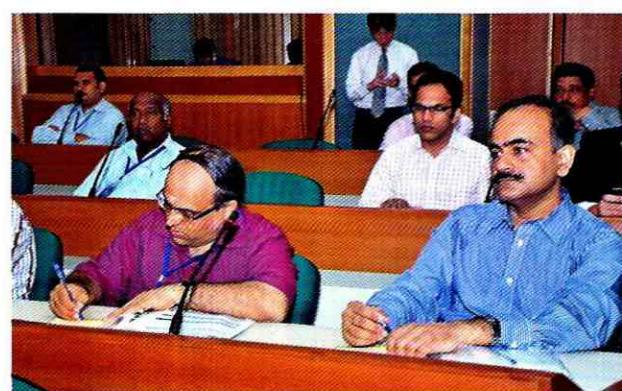
(L-R) Mr Vishnu Mathur, Director General SIAM; Mr Biplav Basu, Sales Manager, ALCOA; Prof. K. S S Murthy, Hon. Gen. Secretary, AAI; Dr Sutanu Behuria, Secretary, MoH& P.E



Dr. Sutanu Behuria, Secretary, MoH& P.E addressing at the seminar on Light Weighting



Delegates at the seminar



(L-R) Mr Vikram Gulati, Director, Natrip; Mr Niraj Kumar, Director, DHI during the Seminar on Light Weighting of Automobiles Through Aluminum

"Light Weighting of Automobiles Through Aluminum" on 7th August 2013 in New Delhi. Senior industry representatives and Bureaucrats attended the conference. The inaugural session was addressed by Chief Guest, Dr. Sutanu Behuria, then Secretary, Ministry of Heavy Industries & Public Enterprises.



Mr Praful Patel, Hon'ble Minister of Heavy Industries & Public Enterprises inaugurating the H&EV Pavilion, alongwith Mr Vikram S Kirloskar, President, SIAM and other industry leaders

Hybrid & Electric Vehicle Theme Pavilion at Auto Expo 2014 - The Motor Show

National Electric Mobility Mission Plan 2020 stressed upon a comprehensive communication strategy to create awareness of xEV Technology amongst the Indian masses with the objective of promoting use of xEVs and presenting it as a viable and cost effective option to traditional mobility means. SIAM took an initiative to launch this comprehensive communication strategy along with the Department of Heavy Industry, Ministry of Heavy Industries & Public Enterprises during the Auto Expo - The Motor Show 2014 in the form of creating a first of its kind Hybrid and Electric Mobility Theme Pavilion along with the Test Drive Facility for Hybrid and Electric Vehicles.



Interior view of the Hybrid & Electric Vehicle Theme Pavilion

The pavilion saw participation from Mahindra & Mahindra, Maruti Suzuki, Tata Motors, Toyota Kirloskar Motors, TVS Motors, Hero Electric, Electrotherm etc. This gave consumers a first-hand experience of xEVs. The focus of the pavilion was on imparting knowledge with a messaging theme of "Energy - Use It or Lose It".

International Conference on Hybrid & Electric Mobility

Society of Indian Automobile Manufacturers (SIAM) and Automotive Component Manufacturers Association of India (ACMA) under the aegis of Department of Heavy Industry, Ministry of Heavy Industries & Public Enterprises had organised International Conference on Hybrid and Electric Mobility on 7th February 2014 during the Auto Expo - The Motor Show 2014. Eminent speakers from India and across the world such as USA, Canada, Europe and Japan shared their perspectives on Global policy experience on e-mobility, India's views on e-mobility and Global OEM experience & value chain approach for xEV systems. The conference was attended by more than 100 delegates from the industry, academia and policy makers. The conference was designed to gain global policy



SIAM International Conference on Hybrid and Electric Mobility



SIAM, ACMA and IBM Team at AutoDX Press Release

knowhow as a precursor to the launch of the national scheme namely Faster Adoption and Manufacturing of Hybrid & Electric Vehicles (FAME) under the National Mission on Electric Mobility.

Information Technology Group

1. IT group: Chairman - Mr Vijay Sethi, CIO, Hero MotoCorp; Co-Chair - Mr Bishwanath Ghosh, CIO, Mahindra & Mahindra.

SIAM and ACMA launched the "Auto Data Exchange 'AutoDX'", an EDI platform for seamlessly integrating OEMs and suppliers on a common data exchange standard, on 4th February 2014. The AutoDX made its entry to the industry during the flagship event of the Indian automotive industry, The Auto Expo 2014. AutoDX will help standardise transaction data definitions, automate data exchange amongst industry players, obviate manual

data entries and provide data interchange capability across the automotive industry to enable a streamlined supply chain.

Recycling Group

The group is chaired by Capt. N S Mohan Ram, Advisor, TVS Motor Company and co-chaired by Mr Sanjeev Mandpe, General Manager (Prod. Homologation), Mercedes Benz India. The group has drafted End of Life of Vehicle (ELV) Regulation for India, and the same will be shared amongst the stakeholders for comments. The group is also involved in government meetings/initiatives on evolving the unorganised ELV sector in India. The group is learning from the experience of other countries where ELV regulation are in practice.

The group is working with the government for finalizing the ELV policy and recycling regulations for the country.

Diesel Image

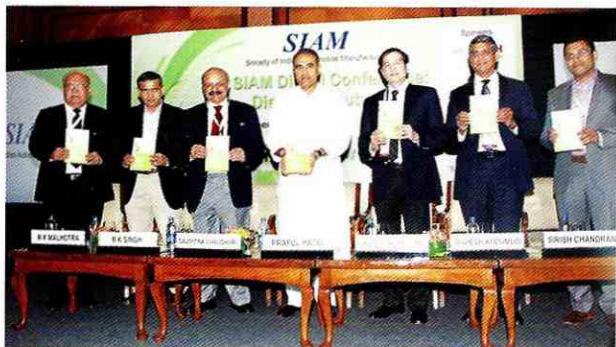
SIAM Diesel Image Group is chaired by Mr Anant J Talaulicar, Chairman & Managing Director, Cummins India.

4th SIAM Diesel Conference - 28 November, 2013

The group organised its annual conference, 4th in the series, on "Diesel for Future: Economy & Environment" in Mumbai on 28th November,



Chairman of SIAM IT Group - Mr Vijay Sethi, CIO, Hero MotoCorp, and IBM Team at AutoDX Launch



(L-R): Dr. R K Malhotra, Director-IOCL; Mr R K Singh, Joint Secretary, MoP&NG; Mr Saumitra Chaudhuri, Member, Planning Commission; Mr Praful Patel, Hon'ble Minister of Heavy Industries & Public Enterprises; Mr Anant J Talaunicar, CMD, Cummins India; Mr Mahesh Kodumudi, President & MD, Volkswagen India; Mr Sirish Chandran, Editor EVO releasing the SIAM Diesel Booklet

2013. Senior industry representatives and government officials attended the conference addressing the need to recognize diesel as a viable solution for energy security and environmental considerations, roadmap towards cleaner emission norms, sustainable pricing model for diesel fuel, fleet modernization, etc. to enable the government to set priority for diesel.



(L-R): Mr Paul Sowerby, Chief Technical Officer, Cummins India; Mr S R Marathe, Director, ARAI; Mr Ambuj Sharma, Additional Secretary, Ministry of Heavy Industries & Public Enterprises; Ms Renuka Kirpalani, Host & Editor, Auto Car Show; Dr. Tim Leverton, Head- Advanced & Product Engg., Tata Motors; Mr Vishnu Mathur, Director General, SIAM

SIAM's diesel booklet titled "Diesel Goes Green", was Launched by Mr Praful Patel, then Hon'ble Minister for Heavy Industries & Public Enterprises at the Conference.

Automotive Infotronics

The group is chaired by Mr Gangopadhyay of Tata Motors Ltd and co-chaired By Mr Sakthivelan, Deputy GM of Toyota Kirloskar Motors Ltd.

Radio-frequency identification (RFID)

Mandatory fitment of RFID tags on vehicles was implemented from 8th October 2013 for Electronic Toll Collection (ETC). MoRT&H conducted an Electronic Toll Collection (ETC) workshop on 21st May, 2014 for sharing the developments in the pilot project on the Mumbai - Vadodara Highway for Electronic Toll collection, and further course of action that would be required for implementation of RFID for Electronic Toll Collection across the country.

Gaseous Fuel Group

The group is chaired by Mr Kanwaldeep Singh, Vice President (Corporate Services), Maruti Suzuki India Limited and co-chaired by Mr S Arun, Asst. General Manager, Ashok Leyland Ltd. The Group works on the fuel security need for developing multiple fuel options, global scenario, cost economics of Natural Gas Vehicles (NGVs) and the possible opportunity. The group also develops the CNG/LPG infrastructure monitor on quarterly basis which has been appreciated by members.

Mandatory CNG Leakage Testing for Transport Vehicles in Delhi

SIAM held a meeting with its members to discuss the issues related to CNG Leakage Testing and of fee hike for the test involved.

Transport Department - Delhi also held a meeting in April 2014 to discuss usage of software by DTC and Arieon Technologies which is the service provider for online CNG certificate system.

NATIONAL AND INTERNATIONAL REGULATION COUNCIL

This Council is chaired and co-chaired by Mr Siddhartha Lal, Managing Director, Volvo Eicher Commercial Vehicles and Mr I V Rao, Advisor, Maruti Suzuki India, respectively.



Members at the meeting of SIAM Gaseous Fuel Group

The council reviews and discusses the activities related to groups on Emissions & Conservation, CMVR & Safety Regulation, Two Wheeler Group, Three Wheeler Group, and International Harmonization Group. The council takes policy level decisions on various important issues.

Emission & Conservation Group

The Group is chaired by Mr J K Deb, Vice President (Engg. & Development), Fiat India Automobiles Pvt Ltd and co-chaired by Mr P Panda, Vice President, Maruti Suzuki India Ltd. The group, besides other issues, is actively dealing with the developments in fuel efficiency regulation and is effectively providing inputs to the government of India's expert committee on "Auto Fuel Policy and Vision 2025".

Auto Fuel Vision and Policy 2025, New Delhi

An Expert Committee on Auto Fuel Vision and Policy 2025, under the Chairmanship of Dr. Saumitra Chaudhuri, then Member, Planning Commission has prepared a report

for future roadmap of vehicle emission norms along with a roadmap for improvement of fuel specification by oil companies. The committee recommends BS IV emission for four wheelers across India, to be implemented from 2017 onwards, BS V emission norms to be implemented from the year 2020 onwards for new models, and from 2021 for existing models. The expert committee has proposed that BS IV emission norms are extended across the northern states of India in the year 2015 and across the southern states by the year 2016. The two wheelers BS IV emission norms levels have been announced and notification issued by Ministry of Road Transport and Highways, for implementation from the year 2016, for new types of vehicle models and from 2017 for existing vehicle models. The next stage of emission norms for three wheelers has also been finalized by the expert committee. The policy also suggested roadmap and emission limits for BS V for two wheelers and three wheelers.

The recommendations, which have been made public are yet to be approved by the



Members at the meeting of SIAM Emissions & Conservation Group

government. SIAM has requested for early notification of the same so that adequate time is available for development and implementation.

Fuel Efficiency Norms of Passenger Cars

The Government of India, through Ministry of Power issued the Fuel Efficiency (FE) notification on 30th January 2014, for new fleet of passenger cars manufactured from 1st April 2016, and to be implemented by Ministry of Road Transport & Highways (MoRT&H). The first stage of the fuel efficiency regulation would be based on a limit of 129.8 g/km of average CO₂ at an average weight of 1,035 kgs, from the year 2016. The next stage would be based on a limit of 113 g/km of average CO₂ to be implemented from the year 2021 at a maximum average weight of 1,145 kgs. SIAM has already submitted its comments on the notification requesting that the implementation should be from the year 2017 in the first stage and from the year 2022 in the second stage. Further, it has been pointed out by SIAM that the notification also needs to provide clarity on the scope, correct the conversion factors and include credits for electric vehicles. Further, MoRT&H, through International Centre for Automotive Technology (ICAT), is preparing a detailed administrative methodology for implementation of the FE regulation, which would have to be

adhered to, by all manufacturers. As a next step, Bureau of Energy Efficiency (BEE) is considering to finalise a Fuel Efficiency Label for passenger cars. MoP&NG has constituted a steering committee to develop FE regulation for heavy duty vehicles.

Material Compatibility Project by ARAI on Ethanol Blending in Fuel

A project to test the material compatibility with respect to use of ethanol blended gasoline fuel of upto 20% ethanol blend was decided to be undertaken in the 6th meeting of the Inter Ministerial Groups on Fuel Policy and Fuel Efficiency held on 5th March 2013 in New Delhi. The project proposes to test the performance of fuel system so that the vehicle is able to perform as per its optimum intended design features including emissions, drivability, performance, safety requirements, etc. The scope of this project includes old 2, 3 wheelers and cars to be tested with 5, 10 and 20% ethanol blends in gasoline fuel. The duration of the project would be 15 months and the tentative cost will be ₹ 295 lakhs.

Ministry of Road Transport & Highways proposes to extend Bharat Stage IV emission norms in 20 more cities

A draft notification GSR 278(E) was issued on 11th of April, 2014 by the Ministry of



SIAM Members at the Two Wheeler group meeting

Road Transport & Highways proposing the extension of BS IV norms in 20 additional cities, namely Puducherry, Mathura, Vapi, Jamnagar, Ankleshwar, Hissar, Bharatpur, Daman, Diu, Silvassa, Unnao, Rae Bareilly, Aligarh, Karnal, Valsad, Yamuna Nagar, Kurukshetra, Nizamabad, Medak and Mehboobnagar in respect of four wheeler vehicles manufactured on or after the 1st April, 2014 except the four wheeler transport vehicles plying on Inter-State Permits or National Permit or All India Tourist Permits, within the jurisdiction of these cities. SIAM has requested MoRT&H for a lead time of minimum 6 months after release of final notification, and also to remove Puducherry and Jamnagar from the scope of notification due to logistics issues arising on account of non-proximity of these cities to the existing BS IV cities. The final notification has since been issued extending BS IV to all the 20 cities from October 2014.

Two Wheeler Group

The Group is chaired by Mr Harjeet Singh, Vice President, Hero MotoCorp Ltd and co-chaired by Mr R Narasimhan, General Manager, Bajaj Auto Ltd. SIAM two wheeler group focuses on various issues primarily related to safety regulations, emission norms, evaporative emission testing procedure, ethanol blending in fuel and developments in Europe for future regulations.

BS IV Type Approval Procedure for Two Wheelers

After a series of internal discussions amongst various stake holders on the Type Approval document for BS IV two wheelers, SIAM had a discussion with ARAI to finalize the same.

ARAI in principle agreed to SIAM inputs on the procedure, however, some additional inputs are to be provided.

Automatic Headlights-on (AHO) for Two Wheelers

Association of Motorcycle Manufacturers in Europe (ACEM) reached a voluntary agreement with all its members to introduce "Automatic Headlights On" (AHO) for all new models of PTWs. European Transport Safety Council and Safer Road Foundation has requested SIAM to consider working with its two wheeler manufacturers for mandating AHO on all motorcycles. Since, SIAM had also



SIAM CMVR group Members



Members at the CMVR group meeting

received a representation from MoRT&H to give its views on the subject, IMMA members were keen to know the further developments in India on AHO and what would be the direction Indian government or SIAM would be keen to adopt.

Three Wheeler Group

The group is chaired by Mr S S Sane, Sr. Vice President (Engg. and R&D), Piaggio Vehicles. The group focuses on emission and safety aspects of three wheelers. The group finalized the recommendations of BS IV and BS V emission norms and submitted the same to the MoRT&H. The group also worked on enhancing the safety in three wheelers by considering seat belt for driver, modified seat dimensions, hard roof etc.

CMVR & Safety Regulation Group

CMVR and Safety Regulation Group is chaired by Mr S Ravishankar, Tata Motors Ltd and co-



Members at the CMVR group meeting

chaired by Mr R Kanitkar, Force Motors Ltd. The group works on several technical and policy level issues related to safety regulations. The group is involved in formulation of new standards; revision of existing standards for alignment with latest UNECE regulations, Safety Roadmap, etc. SIAM panels were created to work on various Automotive Industry Standards (AIS). The group also addresses issues related to the Central Motor Vehicles Rules Technical Standing Committee, Automotive Industry Standards Committee and Transport Engineering Department (BIS).

Mandatory Vehicle Recall Policy

The Ministry of Heavy Industries & Public Enterprises constituted a Core Group under Inter Ministerial Group on Auto Recall and End of Life (ELV) under the chairmanship of Joint Secretary, Ministry of Heavy Industry. ARAI has been requested to draft a mandatory vehicle recall policy that addresses matters such as trigger mechanism, penalty, etc. The inclusion of emission was also discussed

Revision of In-Use Vehicle Testing Requirements for Fitness Test

A Task Force has been formed to review the test requirements mentioned in CMVR and associated requirements for mandatory fitness check process for in-use vehicles. The Task Force has taken a view that the relevant rule

in the present form needs complete change. A detailed process for checking vehicles was presented and discussed. The same would be finalized and submitted to the government.

National Ambulance Code

MoRT&H held various meetings to discuss mandating National Ambulance Code (NAC) and inform that it was decided to remove the requirements of medical equipment from NAC and these would be specified by MoH&FW. SIAM highlighted its concerns related to technical and administrative issues and pointed out the areas where clarifications/modifications are required in the code. SIAM has submitted a modified draft standard in March 2014 and the same is under discussion with the ministry.

Proposal for Revision of Conformity of Production Procedure

MoRT&H is considering revision of the administrative procedure for Conformity of Production (COP) for emission testing, based on a recommendation received by them in order to make it more transparent. Among several suggestions, for making the COP procedure more elaborate, proposal for picking up vehicles from dealers, as a part of COP is being considered. Government is considering ensuring measurement of weight of the vehicle before COP testing.

The chairman formed a committee to monitor recall related activity. ARAI to develop a separate portal with support of the government for online data capture related to Vahan. A committee formed, comprising of members from MoRT&H, DHI, BIS, ARAI, ICAT, SIAM, ACMA and TMA to draft a scheme based on ARAI and SIAM's inputs.

Bharat New Vehicle Safety Assessment Program - New Vehicle Safety Enhancement Initiative by MoRT&H

MoRT&H has constituted a committee in March 2014 to draft the Bharat New Vehicles Safety

Assessment Programme (BNVSAP) to enhance vehicle safety in India in view of the UN Decade of Action for Road Safety.

A sub-group was formed under the Chairmanship of Mr Nitin Gokarn, CEO, NATRIP to prepare a document regarding the testing protocols and procedures involved to initiate BNVSAP.

Quadricycle: A New Category of Vehicle Introduced

MoRT&H issued a notification on 19th February, 2014 adding a new category of transport vehicle "Quadricycle" to Indian Central Motor Vehicle Rules (CMVR). It stated that the rules will come into force from 1st October, 2014 and that the Quadricycle will have enclosed body structure with doors and steering control and permissible dimensions (W*L*H) of 1.5 x 3 x 2.5 for passenger vehicles and 1.5 x 3.7 x 2.5 for goods vehicles, maximum power of 15 kW and maximum speed of 70 kmph.

Inauguration of Vehicle Inspection and Certification Centre at Chhindwara, Madhya Pradesh

Hon'ble Minister of Urban Development and Parliamentary Affairs, Mr Kamal Nath inaugurated the first of the 10 pilot vehicle Inspection and Certification Centre being institutionalized by Ministry of Road Transport and Highways on 1st March 2014 in the presence of Mr Vikram Kirloskar, President, SIAM & Vice Chairman, Toyota Kirloskar, Mr Sanjay Bandopadhyaya, Joint Secretary, MoRT&H and other dignitaries. The Centre, located at Pandhurna, district Chhindwara, Madhya Pradesh and is envisaged to have four testing lanes, two each for light duty and heavy duty commercial vehicles. Nine more centres are being set up out of which five are being set up by ARAI and four by ICAT. M/s Rosemerta Technologies has been selected as the equipment supplier and operator for



(L-R): Mr Vishnu Mathur, Director General, SIAM, Mr Kamal Nath, Hon'ble Minister of Urban Development and Parliamentary Affairs inaugurating the Pilot Vehicle Inspection & certification at Chhindwara, Madhya Pradesh in the presence of Mr Vikram Kirloskar, President, SIAM

these 10 centres through a bidding process by MoRT&H.

International Harmonization Group

The group is chaired by Mr C V Raman, E.D (Engineering) Maruti Suzuki India Ltd and co-chaired by Mr P K Banerjee, Head, (Homologation & Product Evaluation) Tata Motors Ltd.

The group reviews the various regulations

under discussions in the UN WP-29 and forms India's views on the issues having direct relevance. The group has been actively participating in the development of World Light Duty Test Procedure (WLTP) and presenting India's view in OICA and IMMA.

SIAM supported ARAI for the hosting of EPPR working group meeting in India and has proposed hosting the meeting of the WLTP working group in September, 2014.

PUBLIC POLICY



SAFE Annual Convention 2014 held on 9th May 2014 at Bangalore (L-R); Dr. Venkat Srinivas, Vice President, SAFE, Mr. Vikram S. Kirloskar, President, SIAM, Mr. Ambuj Sharma, Addl. Secretary, Ministry of Heavy Industries & Public Enterprises, Mr. P. N. Sreenivasachary, Principal Secretary, Transport, Govt. of Karnataka, Mr. SV Suderson, President, SAFE & Mr. Amaranarayana K. IAS, Transport Commissnor, Govt. of Karnataka,

Society of Automotive Fitness and Environment (SAFE) 2013-2014

The area of road safety on our roads is very crucial and heart touching. The people that are lost to road traffic accidents are normally young people. It's not only the individuals but also their family and relatives that suffer. Statistics do help to illustrate how widespread and devastating the problem has become. The United Nations system now calls it a global public health and development crisis.

The frequency of traffic collisions in India is amongst the highest in the world. A National Crime Records Bureau (NCRB) report revealed that every year, more than 1,35,000 traffic collision-related deaths occur in India and according to WHO, worldwide from road traffic crashes, it works out to an average of 3,400 lives lost in road accidents every day.

For every fatality, many more are left with injuries – between 20 and 50 million cases worldwide, every year – causing temporary or permanent disabilities. That, in turn, leads to a

significant loss of productivity and income for families and the economy as a whole.

The vast majority of those affected are young people in developing countries – struck down in the prime of their lives. For those who are left behind, road traffic crashes lead to a tremendous amount of pain and suffering and – in many settings around the world – to economic hardship.

To come out of these situations, following initiatives can help:

Understanding the complex problem is the first step. Physical and mental health of motorists, their vehicle condition, pedestrians' behaviour and road conditions are all contributing factors. The five key risk factors, according to researchers, are: a) drinking and driving, b) over-speeding, c) failing to use two-wheeler helmets, d) wearing seat-belts and e) using child restraints. Having laws covering all these risks, and ensuring their proper enforcement, can help bring down road accident incidents as well as fatalities.

Many studies say laws are already in place in many countries for national speed limits, drunk driving, motor cycle helmets and seat belts, etc., but it also shows some gaps in laws and their enforcements. For example, while 99% of motor cycle riders are said to wear helmets, only 87% of their passengers do. Studies also found that in many countries 79% of drivers now wear seat belts but only 46% of front seat passengers do.

Our roads have a long way to go before they become safer for all users. There is no regular inspection of existing road infrastructure, and no policies encouraging cycling or walking. There is also no policy yet to separate road users to protect the most vulnerable amongst them.

Similarly, post-crash care is also lacking, even in urban areas. Less than 10% of those seriously injured in road accidents are taken to hospital by ambulance. Emergency medicine training for doctors and nurses is currently lacking.

Action is to be taken on all five 'pillars' identified for strengthening during the decade: road safety management, infrastructure, safe vehicles, road user behaviour and post-crash care. State, private, academic and civil society groups are being involved.

Less appreciated factors include frequent road damage due to poorly designed roads without pedestrian foot walks, wide shoulders, crossings, adequate lighting, road markings, and traffic signals.

To address these issues, SAFE along with automobile manufacturers have taken initiatives by working in the area of road safety and in-use vehicle management and tried to spread awareness among citizens of India by following activities carried out in 2013 - 2014:

- World Environment Day on 5th June 2013, SAFE with the SIAM members and member's dealers support organised 4500 free PUC check-up camps across India
- National Road Safety Week 2014, organised road safety programs at 4500

dealers network across India, more than 75 refresher driver training program conducted, health check up camps for heavy commercial vehicle drivers at different states, and many more drives for students, drivers and citizens.

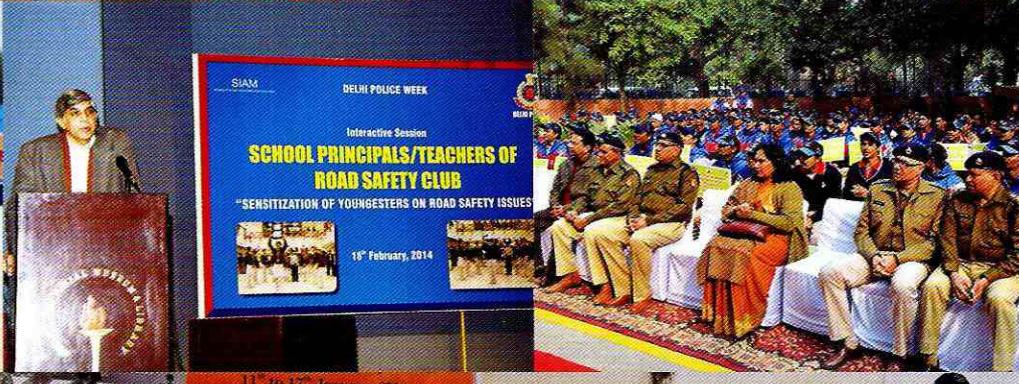
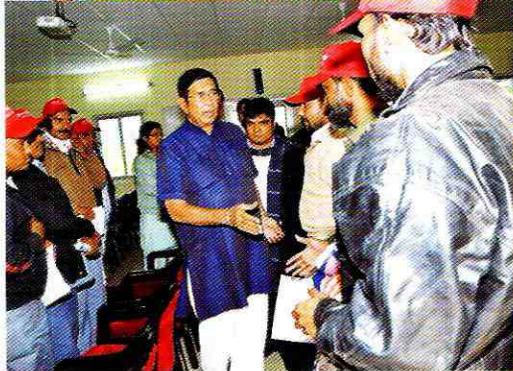
- Various Road Safety drive for school teachers, drivers and students
- Refresher training program for government and corporates drivers
- Roundtable discussions with government and corporates officials on upcoming safety technologies
- Participated in many important ministerial groups working in the area of road safety and in use vehicle management
- Participation at various fora of road safety
- SIAM-SAFE stall for promoting Road Safety with Harley Owner's Group at India Bike Week 2014, Goa

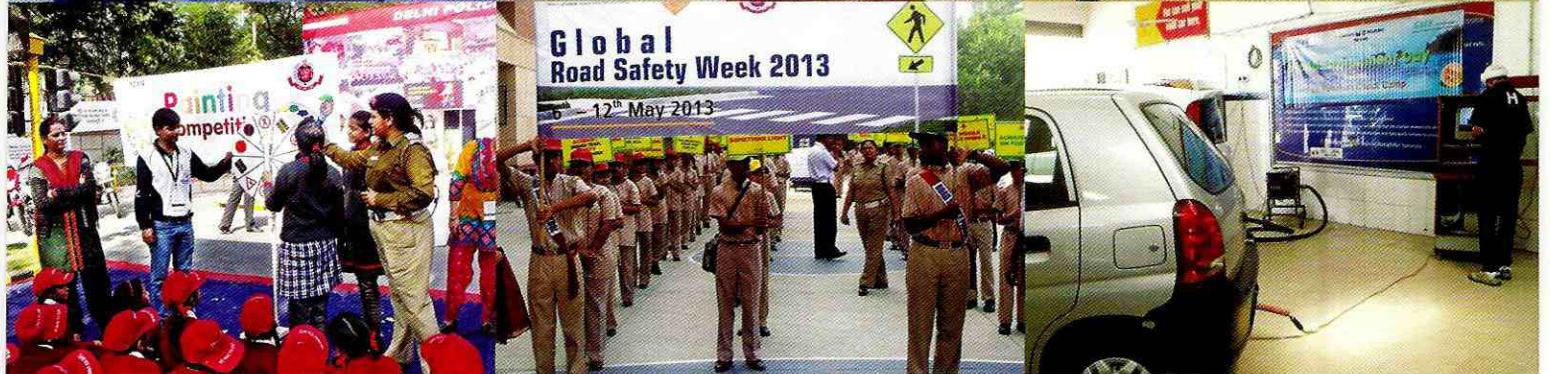
All these activities had been successfully implemented with the support from SAFE and SIAM members, dealers support and encouraging support from NGOs, corporates, ministries, state transport departments, traffic police, pollution control board, educational institutions, etc.

Every year SAFE organises its Annual Convention in a different state of India. This year it was organised at Bangalore with the theme of "Road Safety: Bringing Policy and Practice Together".

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 that improves road safety and efficiency.

With the support of all the stakeholders, knowledge from national and international experts, adoption of new safety policies, awareness activities etc, SAFE always tries to reach at the goal of bringing down the fatality rate in our country.





OVERVIEW OF THE AUTOMOBILE INDUSTRY 2013-14

Industry performance in 2013-14

Production

The industry produced a total of 21,481,526 vehicles including passenger vehicles, commercial vehicles, three wheelers and two wheelers in April-March 2014 as against 20,647,611 in April-March 2013, registering a growth of 4.04% over the same period last year. The growth is mainly on account of growth in two wheelers production.

Domestic Sales

The overall domestic sales during April-March 2014 grew marginally by 3.53% over the same period last year because of growth in Scooters and motorcycles sales.

The sales of passenger vehicles declined by (-) 6.05% during April-March 2014 over the same period last year. Within the passenger vehicles, passenger cars, utility vehicles and vans dropped by (-) 4.65%, (-) 5.01% and (-) 19.58% respectively during April-March 2014 compared to the same period last year.

The overall commercial vehicles segment registered a de-growth of (-) 20.23% in April-March 2014 as compared to the same peri-

od last year. Medium & Heavy Commercial Vehicles (M&HCVs) registered negative growth at (-) 25.33% and Light Commercial Vehicles also dropped by (-) 17.62 percent.

Three wheelers sales declined by (-) 10.90% in April-March 2014 over the same period last year. Passenger carriers and goods carriers declined by (-) 12.74% and (-) 2.53%, respectively, in April-March 2014 over April-March 2013.

Two wheelers sales registered growth of 7.31% during April-March 2014 over April-March 2013. Within the two wheelers segment, scooters and motorcycles grew at 23.24% and 3.91%, respectively, while mopeds declined by (-) 8.35% in April-March 2014 over April-March 2013.

Exports

During April-March 2014, overall automobile exports grew by 7.21 percent. Passenger vehicles, three wheelers and two wheelers registered growth at 6.09% 16.60% and 6.52%, respectively, while commercial vehicles declined by (-) 3.71% during April-March 2014 compared to the same period last year.

Automobile Production Trends

Category	(Number of Vehicles)					
	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14
Passenger Cars	1,516,967	1,932,620	2,453,097	2,537,170	2,423,086	2,311,972
Utility Vehicles	219,498	272,883	313,142	370,945	568,538	563,986
Vans	102,128	151,908	216,533	237,954	239,434	196,693
Total Passenger Vehicles	1,838,593	2,357,411	2,982,772	3,146,069	3,231,058	3,072,651
M&HCVs	192,283	250,133	345,818	384,801	280,677	221,626
LCVs	224,587	317,423	414,917	544,335	551,972	477,238
Total Commercial Vehicles	416,870	567,556	760,735	929,136	832,649	698,864
Three Wheelers	497,020	619,194	799,553	879,289	839,748	830,120
Scooters	1,161,276	1,494,409	2,134,585	2,659,340	3,026,512	3,676,193
Motorcycles	6,798,118	8,444,857	10,510,189	11,982,669	11,925,690	12,471,488
Mopeds	436,219	571,070	704,575	785,523	791,954	732,210
Electric Two Wheelers	24,179	2,567	-	-	-	-
Total Two Wheelers	8,419,792	10,512,903	13,349,349	15,427,532	15,744,156	16,879,891
Grand Total	11,172,275	14,057,064	17,892,409	20,382,026	20,647,611	21,481,526

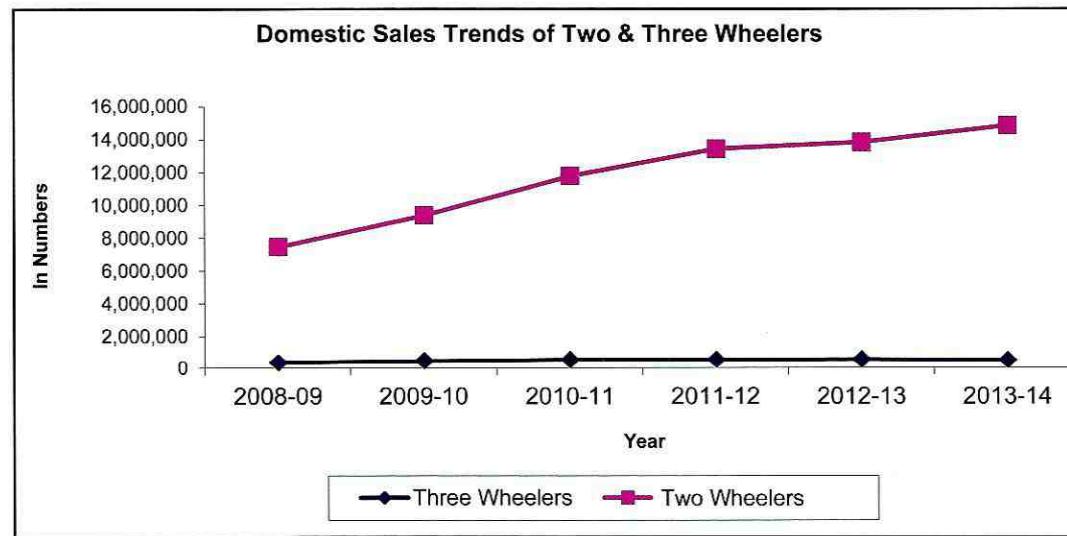
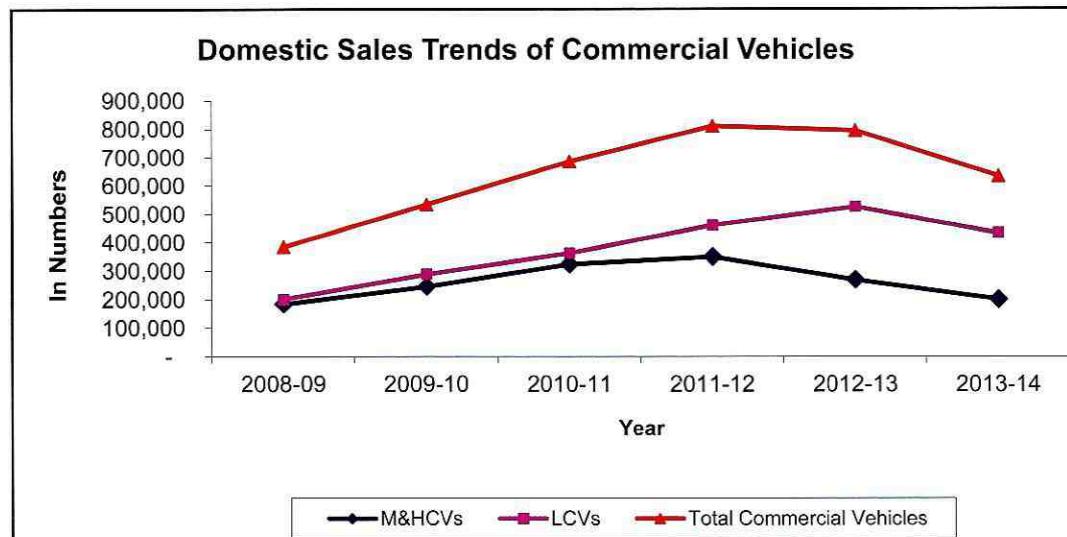
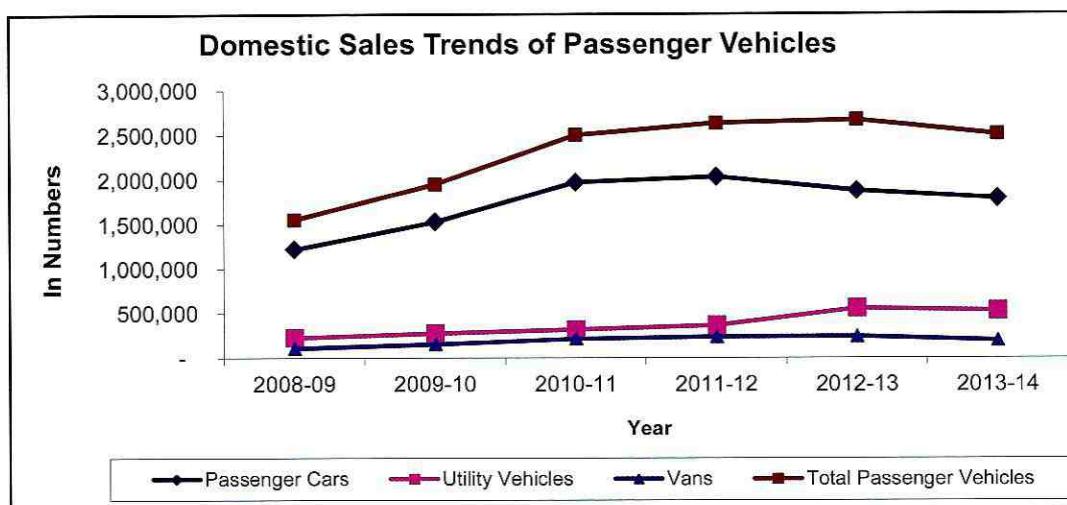
Automobile Domestic Sales Trends

Category	(Number of Vehicles)					
	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14
Passenger Cars	1,220,475	1,528,337	1,972,845	2,031,306	1,874,055	1,786,899
Utility Vehicles	225,621	272,740	315,123	363,772	553,662	525,942
Vans	106,607	150,256	213,574	234,761	237,298	190,844
Total Passenger Vehicles	1,552,703	1,951,333	2,501,542	2,629,839	2,665,015	2,503,685
M&HCVs	183,495	244,944	323,059	349,216	268,689	200,627
LCVs	200,699	287,777	361,846	460,283	524,522	432,111
Total Commercial Vehicles	384,194	532,721	684,905	809,499	793,211	632,738
Three Wheelers	349,727	440,392	526,024	513,281	538,290	479,634
Scooters	1,148,007	1,462,534	2,057,604	2,558,981	2,923,424	3,602,744
Motorcycles	5,831,953	7,341,122	9,013,888	10,073,303	10,085,000	10,479,817
Mopeds	431,214	564,584	697,418	776,866	788,761	722,920
Electric Two Wheelers	26,445	2,711	-	-	-	-
Total Two Wheelers	7,437,619	9,370,951	11,768,910	13,409,150	13,797,185	14,805,481
Grand Total	9,724,243	12,295,397	15,481,381	17,361,769	17,793,701	18,421,538

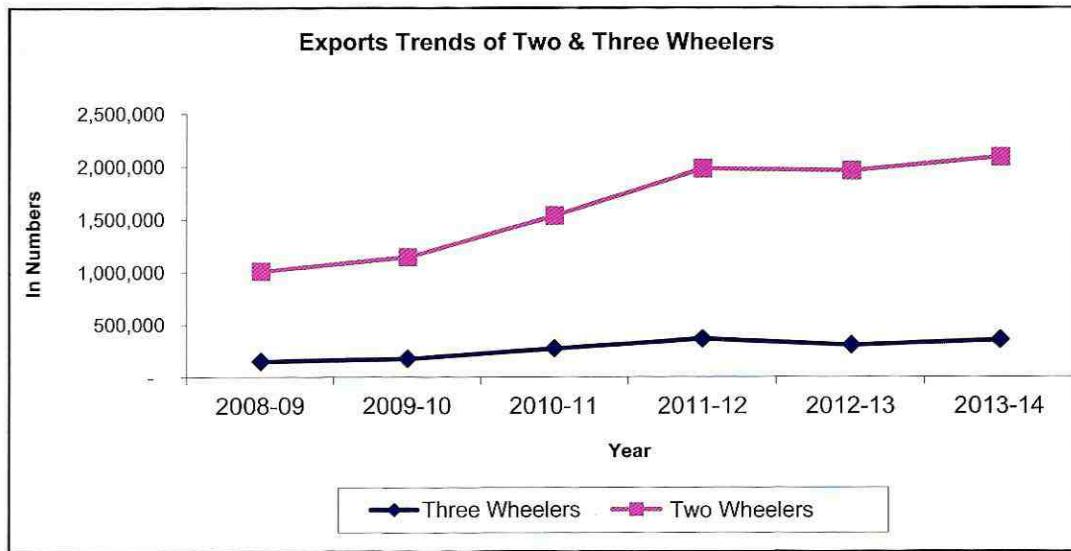
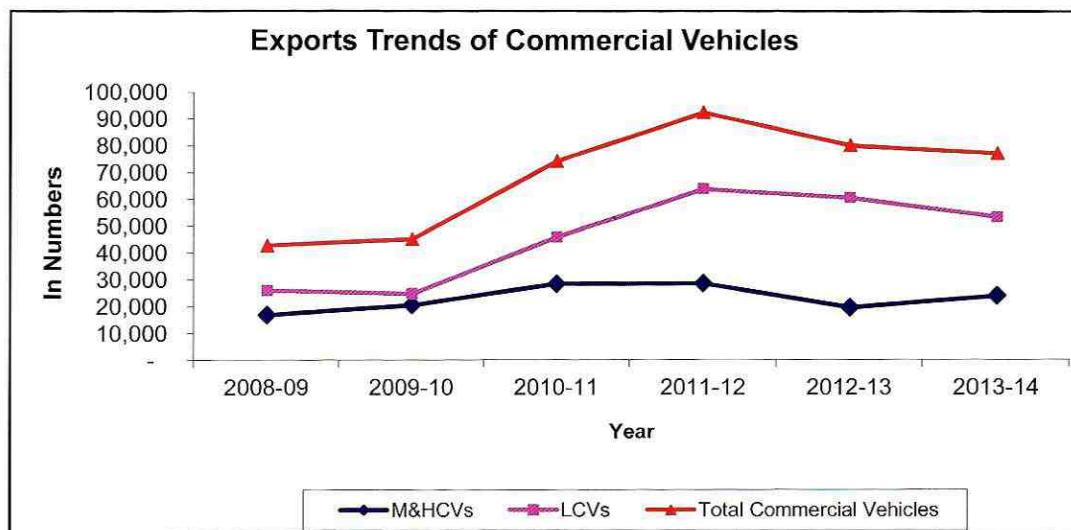
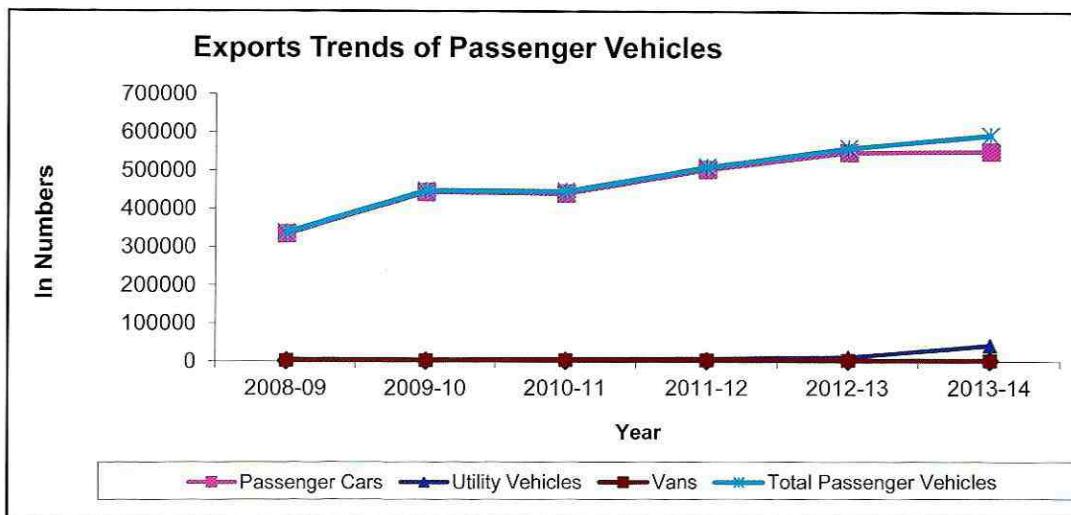
Automobile Exports Trends

Category	(Number of Vehicles)					
	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14
Passenger Cars	331,535	441,709	438,214	501,546	547,222	550,466
Utility Vehicles	3,034	2,823	3,746	5,221	10,423	41,550
Vans	1,160	1,613	2,366	2,016	1,769	1,491
Total Passenger Vehicles	335,729	446,145	444,326	508,783	559,414	593,507
M&HCVs	16,819	20,425	28,349	28,495	19,524	23,813
LCVs	25,806	24,584	45,694	63,763	60,503	53,243
Total Commercial Vehicles	42,625	45,009	74,043	92,258	80,027	77,056
Three Wheelers	148,066	173,214	269,968	361,753	303,088	353,392
Scooters	25,816	30,125	50,646	94,440	91,062	93,931
Motorcycles	971,018	1,102,978	1,474,678	1,871,595	1,862,008	1,982,755
Mopeds	7,300	6,905	6,295	9,076	3,308	7,252
Electric Two Wheelers	40	50	-	-	-	-
Total Two Wheelers	1,004,174	1,140,058	1,531,619	1,975,111	1,956,378	2,083,938
Grand Total	1,530,594	1,804,426	2,319,956	2,937,905	2,898,907	3,107,893

Domestic Sales Trends



Exports Trends



SIAM OFFICE BEARERS

SIAM Executive Committee 2013-2014

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 Lowell Paddock <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 Mahesh M Narang
Fiat India Automobiles Pvt Ltd	Mr Gurpratap Boparai	Mr Nagesh Basavanhalli
Ford India Pvt Ltd	Mr Nigel Harris	Dr. Shripad Bhat
Hero MotoCorp Ltd	Mr Pawan Munjal	
Hindustan Motors Ltd	Mr Uttam Bose (Co-opted)	
Honda Cars India Ltd	Mr Hironori Kanayama	Mr Raman Kumar Sharma
Hyundai Motor India Ltd	Mr Bo Shin Seo	Mr Rakesh Srivastava
Mahindra & Mahindra Ltd	Dr. Pawan Goenka (Co-opted)	Mr Sachin Arolkar
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	Mr Hardip Singh Goindi
Renault India Pvt Ltd	Mr Marc Nassif	Mr Sumit Sawhney
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	
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 2014

COUNCILS & GROUPS

A. COUNCIL ON INTERNATIONAL BUSINESS



Chairman: Dr Pawan Goenka
 Executive Director & President - Automotive & Farm
 Equipment Sectors, Mahindra & Mahindra Ltd



Chairman: Mr Ketan Doshi
 CEO - MADPL & NBS,
 Mahindra & Mahindra Ltd



Co-Chairman: Mr S Ravikumar
 Vice President, (Business Development)
 Bajaj Auto Ltd

1. TRADE POLICY GROUP



Chairman: Mr A S Puri
 Vice President (Govt. Affairs &
 Collaborations), Tata Motors Ltd



Co-Chairman: Mr Rahul Bharti
 General Manager (Corporate Planning & Govt. Affairs),
 Maruti Suzuki India Ltd

2. INTERNATIONAL RELATIONS GROUP



Chairman: Mr P N Shah
 Chief Executive - Automotive Division &
 International Operations
 Mahindra & Mahindra Ltd



Co-Chairman: Mr R T Wasan
 Head (International Business - CVBU)
 Tata Motors Ltd

3. EXPORTS GROUP



Co-Chairman: Mr R T Wasan
 Head (International Business - CVBU)
 Tata Motors 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

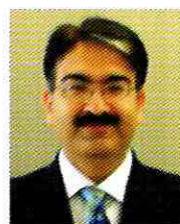


Co-Chairman: Mr N K Rattan
President (Corporate Sales & Marketing)
Force Motors Ltd

2. TRADE FAIRS GROUP



Chairman: Mr Arvind Saxena
Managing Director
Volkswagen Group Sales India



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

3. LOGISTICS GROUP



Chairman: Mr M M Singh
Chief Operating Officer (Production)
Maruti Suzuki India Ltd



Co-Chairman: Mr Prem Verma
Chief Executive Officer
TML Distribution Company Ltd (Tata Motors)

4. SERVICE HEADS GROUP



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



Co-Chairman: Mr Rajesh Mukhija
Associate Vice President
Hero MotoCorp Ltd



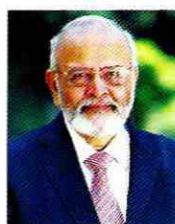
Chairman: Mr Vijay Sethi
Vice President (Information Systems)
Hero MotoCorp Ltd

5. 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 Sudam Maitra
Chief Operating Officer (Supply Chain)
Maruti Suzuki India Ltd



Co-Chairman: Mr B B Parekh
Chief Purchase Officer
Tata Motors Ltd

1. Sourcing Group

2. ECONOMIC RESEARCH GROUP



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



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

3. TAXATION POLICY GROUP



Chairman: Mr Shekar Viswanathan
Vice Chairman & Whole Time Director
Toyota Kirloskar Motor Pvt Ltd



Co-Chairman: Mr R Sethuraman
Director (Finance)
Hyundai Motor India Ltd

4. TAXATION PROCEDURAL GROUP



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



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

5. DIRECT TAX GROUP



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

6. FINANCE, LEASING & INSURANCE GROUP



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



Co-Chairman: Mr Anil Kapur
Vice President
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



Chairman: Mr Rajesh Bagga
 Vice President (Legal)
 Tata Motors Ltd



Co-Chairman: Mr R S Kalsi
 Executive Director (Parts & Vehicle
 Logistics), Maruti Suzuki India Ltd

8. ANTI COUNTERFEITING GROUP

D. TECHNICAL COUNCIL



Chairman: Mr Vinod K Dasari
 Managing Director
 Ashok Leyland Ltd



Chairman: Dr Rao Chalasani
 Director (AVDC)
 General Motors India Pvt Ltd



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

1. FRONTIER TECHNOLOGY GROUP, EV & HEV



Chairman: Capt. N S Mohanram
Advisor
TVS Motor Company Ltd

2. RECYCLING GROUP



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



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

3. DIESEL IMAGE GROUP



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

4. GASEOUS FUELS GROUP



Co-Chairman: Mr Arun Sivasubrahmanian
Chief Engineer - OBD & Head - Regulations
Product Development, Ashok Leyland Ltd



Chairman: Dr. Anupam Gangopadhyay
Head - Electricals & Electronics (CVBU)
Tata Motors Ltd

5. AUTO INFOTRONICS GROUP



Co-Chairman: Mr S Sakthivelan
Deputy General Manager (External Affairs)
Toyota Kirloskar Motor Pvt Ltd

6. STYLING & DESIGN GROUP



Chairman: Mr Pankaj Jhunja
General Manager - Design
Tata Motors Ltd



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

E. NATIONAL & INTERNATIONAL REGULATION COUNCIL



Chairman: Mr Siddhartha Lal
Managing Director
VE Commercial Vehicles Ltd



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

1. EMISSIONS & CONSERVATION GROUP



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



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 - PD
Ashok Leyland Ltd



Co-Chairman: Mr R M Kanitkar
Senior Chief Engineer (R&D - Engines),
Force Motors Ltd

3. TWO WHEELERS GROUP



Chairman: Mr Harjeet Singh
Vice President
Hero MotoCorp Ltd



Co-Chairman: Mr R Narasimhan
Vice President
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
Maruti Suzuki India Ltd



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



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

G. THREE WHEELERS CEO'S COUNCIL



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 Lowell Paddock
 President & Managing Director
 General Motors India Pvt Ltd



J. MUVS CEO'S COUNCIL

Chairman: Mr Shekar Viswanathan
 Vice Chairman & Whole Time Director
 Toyota Kirloskar Motor Pvt Ltd



I. SAFE - SOCIETY FOR AUTOMOTIVE FITNESS & ENVIRONMENT

President: Dr. N Saravanan
 Special Director
 Ashok Leyland Ltd



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

As on 31st March 2014

AIAM/SIAM PAST PRESIDENT

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 Vencatesan	Premier Automobiles Ltd
1980 & 1981	Mr C V Karthik Narayanan	Standard Motor Product 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 Bhattar	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 Limited
2009/10 & 2010/11	Dr Pawan Goenka	Mahindra & Mahindra Ltd
2011/12 & 2012/13	Mr S Sandilya	Royal Enfield (A unit of Eicher Motors)
2013/14 Till date	Mr Vikram Kirloskar	Toyota Kirloskar Motor 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 Motors 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 P Ltd*
- 20. International Cars & Motors Ltd
- 21. India Yamaha Motor Pvt Ltd
- 22. Isuzu Motor Company Ltd*
- 23. JCBL
- 24. Kinetic Motor Company Ltd
- 25. India Kawasaki Motors Private Ltd*
- 26. LML Ltd
- 27. Mahindra & Mahindra Ltd
- 28. Mahindra 2 Wheelers Ltd
- 29. Mahindra Reva Electric Vehicle Pvt Ltd
- 30. Mahindra Truck & Buses Ltd
- 31. Maruti Suzuki India Ltd
- 32. Mercedes Benz India Pvt Ltd
- 33. Nissan Motor India
- 34. Premier Ltd
- 35. Piaggio Vehicles Pvt Ltd
- 36. Renault India Pvt Ltd
- 37. Royal Enfield
- 38. Scooters India Ltd
- 39. Simpson & Co. Ltd
- 40. Scania Commercial Vehicles Ltd*
- 41. Skoda Auto India Pvt Ltd
- 42. Suzuki Motorcycle India Pvt Ltd
- 43. SML Isuzu Ltd
- 44. Tata Motors Ltd
- 45. Triumph Motor India Ltd*
- 46. TVS Motor Company Ltd
- 47. Toyota Kirloskar Motor Pvt Ltd
- 48. VE Commercial Vehicles Ltd
- 49. Volvo Buses India Pvt Ltd
- 50. Volkswagen India Pvt Ltd

**Associate Member*

As on 31st March 2014

SIAM SECRETARIAT



Mr Amit Kumar	Mr Philip Skaria
Mr Arindom Ghatak	Mr R N Chakravarty
Mr Arnab Chakraborti	Ms Ragmani Shukla
Mr Atanu Ganguli	Mr Raju Kamat
Mr B K Dutta	Mr Ramesh P Iyer
Mr Bhisham Prasad Rai	Ms Ritika Changia
Mr Debasish Majumder	Ms Ruby Ganguly
Mr Dhiraj V Chatap	Mr Saurabh Rohilla
Mr Dikshant Negi	Mr Sugato Sen
Mr Dinesh Patnaik	Mr Sundeep Sundli
Mr Hardik Makhija	Ms Supriya Sinha
Mr J S Cheema	Mr Sushil Kumar
Mr Jitendra Rai	Mr Swarann Singh Virdi*
Mr K K Gandhi	Mr Tribhuvan Rai
Mr Kartike Karwal	Mr V K Pandey
Ms Manju Dhamija	Mr Vandit Vijay*
Mr Manoj Das Mohapatra	Mr Vishnu Mathur
Ms Meenakshi Kukreja	

**For part of the year 2014*

In alphabetical order

LINKAGE WITH OTHER INSTITUTIONS IN INDIA

All India Motor Transport Congress
 Alloy Steel Producers Association
 Aluminum 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
 Central Institute of Road Transport
 Central Road Research Institute
 Center for High Technology
 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 Non-aligned and Other Developing Countries
 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, Bangladesh
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 Organisation of Motor Vehicle Manufacturers (OICA)
Japan Automobile Manufacturer Association (JAMA), Japan
Japan Automobile Standards Internationalisation Centre, Japan
Korean Automobile Manufacturers Association (KAMA), South Korea
Malaysian Automotive Association (MAA)
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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