

Annual Report 2012 - 2013

SIAM

Society of Indian Automobile Manufacturers

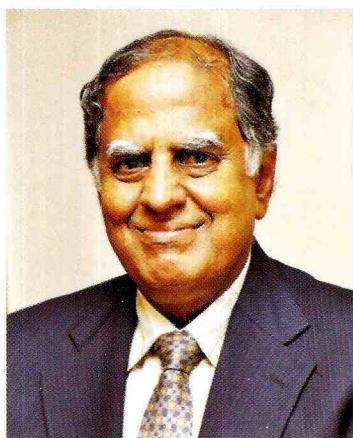
SIAM
Society of Indian Automobile Manufacturers

ANNUAL REPORT 2012-13

CONTENTS

President's Message	6
About SIAM	11
Annual Convention 2012	12
International Bus & Utility Vehicle Show 2013	18
Felicitation of Doyens of Automotive Industry	21
Economic Agenda	22
Technical Agenda	33
Public Policy/ SAFE Agenda	39
Industry Overview: 2012-13	44
Office Bearers	48
Councils & Groups	49
AIAM/SIAM Past Presidents	58
SIAM Members	59
SIAM Secretariat	60
Linkage with Other Institutions of India	61
Overseas Linkage	62

PRESIDENT'S MESSAGE



Dear Friends,

The automotive industry is currently facing, perhaps, one of the most trying times in the past couple of decades, i.e. since liberalization. Over the last 24 months, the automotive market has declined-steadily leaving the industry gasping for breath. We have witnessed the 16th straight month of decline in Medium and Heavy Commercial Vehicles (M&HCV) sales and the 7th straight month of decline in Passenger Vehicle (PV) sales till June 2013. Even the highly resilient 2-wheeler market did not remain unaffected and saw a decline during 1st quarter of FY14. Half way through the financial year 2013-14, almost all the segments of the auto industry are showing negative performance over the last year which itself was a low performing year.

Interest rates that had risen substantially in the year 2011-12 remained high but relatively stable during the last 12 months. However, continued volatility in the prices of crude further kindled by the rapid depreciation of the rupee saw a relentless rise in the price of petrol and diesel and this coupled with the continued high inflation made it difficult for the interest rates to be brought down. After a long national debate, Government also announced a roadmap to move towards market pricing of diesel fuel with a staggered increase in the price of diesel every month with the intention of removing the under recovery within a 15 month period. This was perhaps the most notable development on the policy front last year and SIAM welcomed this move. However, the combined effect of high interest rates, high fuel prices, depressed market conditions and low sentiment in the consumer confidence took a heavy toll on the performance of the industry.

Commercial Vehicles have been the worst affected with a decline of 8%, closely followed by passenger vehicles 7%. Even two wheelers clocked a decline of 1% during April-June 2013. The question that everyone is asking is whether the worst is over.

The export markets too remained sluggish with the extended slowdown in the European market. The auto industry rose to the challenge and made sustained efforts to tap new export markets in Latin America, Africa etc. Overall, the auto industry was able to achieve reasonable quantum of exports with the PV segment at 1,34,000 Commercial vehicles 15,000 and two wheelers at 4,57,000 during April-June 2013.

Notwithstanding the current environment, the automotive industry has reposed tremendous confidence in the future of the automotive industry in the country. Companies have continued their investments and capacity creation efforts which would take India surely and steadily towards becoming a global base for automotive manufacture. To counter the slowdown, industry launched around 34 new models of passenger vehicles, and around 20 new models of two wheelers. The JNNURM Scheme that was extended at SIAM's specific request, will provide opportunity for sale of about 10,000 commercial vehicles. This along with a marginal reduction in the Excise Duty on commercial vehicles will no doubt signal a revival in the fortunes of the industry. With a good monsoon this year, there is also optimism that rural demand would pick up during the following months aided by the festive season that is just around the corner which could just be the beginning of yet another growth phase for the industry.

During the year, developments in the area of Regulatory framework, Global Harmonisation, Safety, Emissions, etc remained a priority for SIAM. SIAM's close engagement at the WP-29 forum, APEC Automotive Dialogue, OICA and IMMA ensured that India remained at the forefront of these interactions to project India's view point effectively.

SIAM was invited to nominate the President of the International Motorcycle Manufacturers Association (IMMA) based in Geneva for the period 2012-14 and as President, I have the honour of chairing the same. Our presence in IMMA ensures that Indian auto industry's view point, as the second largest producer of two wheelers in the world, is considered while framing the International two wheeler regulations. It has also enabled us to learn the latest developments in the powered two wheeler segment at a global level.

At home, SIAM maintained a close partnership with Government at different Ministries and at all levels. The highlight of the year was the launch of the National Mission on Electric Mobility (NMEM) by the Hon'ble Prime Minister in January 2013 which marks the beginning of a new era of mobility in India. This was followed by Government's approval to a number of Pilot Projects on electric mobility which are expected to be launched over the next few months.

In its mission to achieve energy security, SIAM formed a committee on Gaseous Fuels to look at alternate energy sources. SIAM continued to provide inputs to the CMVR-TSC for aligning the safety regulations with international regulations and also helped in introducing advanced safety regulations to make the vehicles safer.

As a part of Government's efforts to garner more revenue, Excise Duties on passenger vehicles were raised during the last one year. A new category of passenger vehicle having more than 4 meter length, 1500 cc engine and ground clearance of 170mm or more was created which attracts the highest level of Excise Duty of 30%. This super duty slab impacted SUV manufacturers in particular. Another significant development namely, The Hon'ble Supreme Court's decision in the case of Excise assessment of FIAT under unique circumstances became a base for the excise departments who launched a country-wide collection of vehicle-wise cost data. SIAM has taken up this matter and held discussions at various levels in the Government making very specific recommendations to avoid blanket interpretation of the decision.

On the technical front, SIAM continued with its thrust on social responsibility, concern for the customer and for the first time launched a "Voluntary Recall Policy". This policy laid down clear guidelines for member companies on the procedure to be followed in case of vehicle recalls. The response from the industry has been overwhelmingly positive and in last one year, more than 8 companies have announced vehicle recalls in full compliance with the guidelines laid down in the SIAM Voluntary Recall Policy. I would like to place on record my appreciation to the members for the proactive initiative in this area which has improved the industry credibility significantly.

SAFE which is an initiative of SIAM covered new ground in promoting Safety and Environment protection. For the first time the message of enhancing road safety was carried to the hill states where driving conditions are particularly challenging. SAFE organised its Annual Convention on 25th April 2013 with the theme of Road Safety:Scientific Tools and Training at Shimla and also organised a roundtable discussion on Safety Future Technologies on 26th April 2013 to upgrade the knowledge of Transport Department officials on upcoming safety features in automotive industry.

SAFE organised Road Safety Awareness drives during National Road Safety Week in January 2013 at 4200 dealer's premises and also organised more than 75 refresher road safety training workshops for school/college students and drivers across the country to spread the message of Road Safety. On the occasion of World Environment Day 2013, SIAM along with its members organised 4300 free of cost PUC Check Up camps across India. SAFE is also doing road safety activities continuously with schools and also initiated awards and prizes for best school doing exemplary work in Road Safety.

The SIAM Styling and Design Conclave, the SIAM Looking Ahead Conclave and the SIAM HR Conclave are now institutionalised by SIAM and are much awaited events by the industry and non-industry stakeholders. Two new initiatives were also started with the organization of the SIAM Innovation Workshop on July 5, 2013, and the SIAM Logistics Conclave on Feb 19th & 20th both of which were a great success.

Rounds of discussions were held with the Parliamentary Standing Committee on Industry as well as Commerce to discuss the state of the industry as well as impact of Trade Agreements on the automotive industry. As always, inputs given by SIAM have been well considered by these Committees.

SIAM continued its strong support to the Automotive Skills Development Council along with ACMA and FADA.

I take this opportunity to thank The Government of India and the various Ministries for their support to SIAM and the Indian Auto Industry. I would also like to thank our partners – Confederation of Indian Industry (CII), Automotive Component Manufacturers Association of India (ACMA), Automotive Tyre Manufacturers Association (ATMA), and Indian Machine Tool Manufacturers Association (IMTMA) for their close partnership. Special thanks are also due to our International Partners like International Organization of Motor Vehicles Manufacturers (OICA), International Motorcycle Manufacture Association (IMMA) , Japan Automobile Manufacturers Association (JAMA), United States Motorcycle Manufacturers Association (USMMA), National Highway Traffic Safety Administration (NHTSA), European Motorcycle Manufacturers Association (ACEM) , Verband der Automobilindustrie.v. (VDA), and Federation of Asian Motorcycle Industries (FAMI).

I would like to thank the Past Presidents and especially the Executive Committee of SIAM for providing continuous support and directions on matters brought before them. I would also like to take this opportunity to thank the Chairs and Co-Chairs of various Groups and Councils who lead all the initiatives and actually made what SIAM is today. And finally I would like to thank SIAM Secretariat who have extended their full support with great enthusiasm under the leadership of Mr Vishnu Mathur, Director General, SIAM in successfully completing my two years tenure as President, SIAM.

As the business conditions went tough, the industry's resilience and determination to succeed has come out to the fore. SIAM members are braving the odds with unique and innovative approaches with full confidence and optimism that the medium to long term prospects for the automotive industry in the country are very promising.

I wish you all the very best.



S Sandilya

4th September 2013



Mr S Sandilya, President, SIAM chairing 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 manufacturers and vehicular engine manufacturers in India.

SIAM supports 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. Its activities are directed towards facilitating improvement of the competitiveness of the Indian Automobile Industry, reducing cost of vehicles, increase in productivity and to achieve global standards of quality.

SIAM provides a window to the Automobile Industry in India and works closely with stakeholders in the formulation of the economic and commercial policies, regulations and standards relating to automobiles. It is providing economic and statistical information as well as technical and public policy services to the Indian automobile industry. It publishes Monthly Industry Statistics, Monthly Raw Material Price Monitor and other reports to enable analysis of trends in the industry. It also organises Seminars & Workshops on the topics of topical relevance and interest to the industry.

It works closely with the Government and with international bodies like United Nations Economic Commission for Europe (UNECE), International Organization of Motor Vehicle Manufacturers (OICA), International Motorcycle Manufacturers Association (IMMA) and coordinate with other counterpart international associations like Verband der Automobilindustrie.v. (VDA), Germany, Japan Automobile Manufacturers Association (JAMA), The Society of Motor Manufacturers and Traders (SMMT), The Thai Automotive Industry Association (TAIA), ASEAN Automotive Federation (AAF), Motor Vehicle Manufacturers Association, Italy (ANFIA) etc.

The Society 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 planned.

SIAM aims to promote growth with responsibility with emphasis on safety, air quality improvement, Formulation of standards and compliance thereof.

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.

In the direction of achieving the mission, SIAM focused on several areas during the last year 2012-13

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

Enable society at large in India to perceive the automotive industry's contribution to the nation and its people

SIAM 52nd ANNUAL CONVENTION

Auto Industry: India in Changing World Order

6th September 2012



Participants at SIAM Annual Convention 2012

The Society of Indian Automobile Manufacturers (SIAM) organised its Annual Convention 2012 to deliberate on the far-reaching changes taking place in the global automotive industry and its implications on India as the developing economies gear up to play a larger role in driving automotive growth in the world.

The SIAM Annual Convention 2012 also reviewed the challenges the auto industry faced in the year gone by, the prevailing economic conditions, challenge of rising interest rates, high fuel prices and their impact on the industry's future prospects.

The theme of the Annual Convention was "Auto Industry: India in Changing World Order".

Around 1000 persons participated from all over the world including CEOs and senior representatives from the Indian and Global OEMs and the component manufacturers. The SIAM Annual Convention 2012 saw global automotive industry leaders, speakers and policy makers from government sharing the same dais to address the dynamics of managing growth in all spheres.



Senior officials from Government and Automotive Industry

The leaders presented their perspectives on the following themes:

- Auto Industry: Thriving, Growing & Leading
- Auto Industry: India in Changing World Order
- Role of India in Global Auto Economy
- Managing Growth Challenges in an Environment of Paradox
- Managing Growth in Changing World Order

Inaugural Session

Mr Praful Patel, Honorable Minister of Heavy Industries & Public Enterprises, was the Chief Guest. Mr S Sandilya, President, SIAM, and Chairman, Eicher Motors welcomed all the dignitaries, guests and delegates present at the Convention.



(L-R): Mr Vikram S Kirloskar, Vice President, SIAM; Mr S Sundaresan, Secretary, Ministry of Heavy Industry & Public Enterprises; Mr Praful Patel Hon'ble Minister, Ministry of Heavy Industry & Public Enterprises; Mr S Sandilya, President, SIAM at the Inaugural Session

Mr S Sandilya spoke on the resilience of the Indian automotive industry in the year gone by, addressing challenges such as inflation, high in-



Mr S Sandilya, President, SIAM addressing the gathering at SIAM Annual Convention 2012

terest rates and rapid hikes in petrol prices. This, he said resulted in a subdued industry growth leading to successive downward revisions in the SIAM sales forecast. While 2012-2013 Q1 growth in the passenger vehicles moderated to 9.71%, the Heavy Goods Carrier segment dipped into negative territory (with Q1 decline of 17.88%). He emphasised the need for quick remedial measures so that the industry does not go through a 2008 situation once again.

He also addressed the need for appropriate taxation policies on the sector.

Chief Guest of the 52nd Annual Convention, Honorable Union Minister of Heavy Industries & Public Enterprises, Mr Praful Patel spoke on the need to pursue a healthy rate of growth. "From an India perspective, until we grow at 8-9 percent, I don't think we can ever be satisfied with the rate of growth of the economy."

He also spoke on the Electric Mobility Plan and the implementation of the Automotive Mission Plan 2006-2016 in creating and executing a viable road map for the industry till 2016 and beyond. He referred to the Ministry of Heavy Industries & Public Enterprises' investments in promoting excellence in various key cutting edge areas, and echoed the industry sentiments against the proposed diesel tax.

Mr Vikram S Kirloskar, Vice President, SIAM & Vice Chairman, Toyota Kirloskar Motor presented the Vote of Thanks.

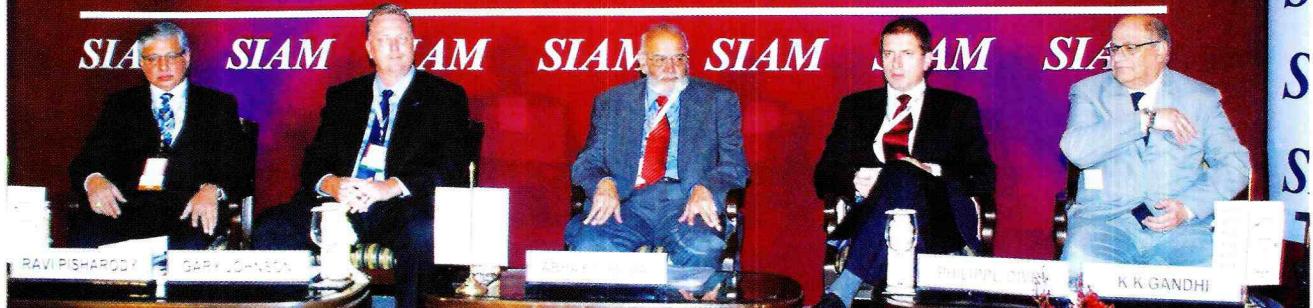


Mr Vikram S Kirloskar, Vice President, SIAM delivering the vote of thanks at SIAM Annual Convention 2012

"Auto Industry : India In Changing World Order"

6th September 2012

New Delhi



"Auto Industry : Thriving, Growing & Leading" (L to R) Mr Ravi Pisharody, Executive Director – Commercial Vehicles, Tata Motors, Mr Gary Johnson, Vice President, Manufacturing, Ford Asia Pacific, Dr Abhay Firodia, Chairman, Force Motors Ltd, Mr Philippe Divry, Senior Vice President, Truck Joint Ventures, Volvo AB and Board Member, VE Commercial Vehicles, Mr K K Gandhi, Executive Director, SIAM

KEYNOTE SESSION 1: "Auto Industry: Thriving, Growing & Leading"

Keynote Session was addressed by Mr Gary Johnson, Vice President, Manufacturing, Ford Asia Pacific and Africa, Mr Philippe Divry, Sr. Vice President, Truck Joint Ventures, Volvo AB and Board Member, VE Commercial Vehicles.

Dr Abhay Firodia, Past President, SIAM & Chairman, Force Motors kicked-off the Session with his welcoming remarks. The first Keynote speaker, Mr Gary Johnson, spoke on the potential of the pan-India auto sector: "The opportunity to be part of this thriving, growing industry not only in the Asia Pacific, but also in India, is something that most of us will not see again in our lifetime."

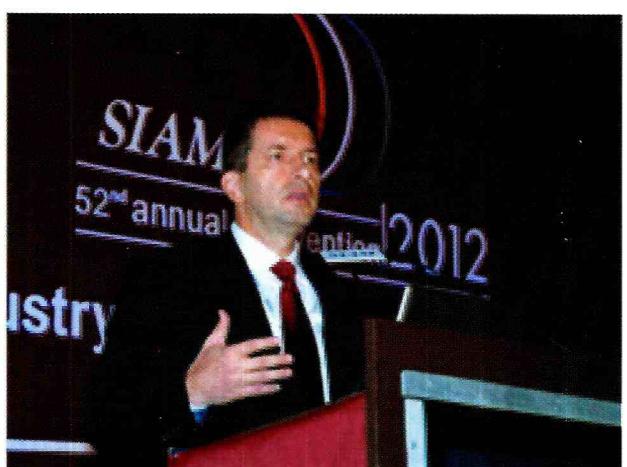
Mr Phillippe Divry, spoke on the 'Major Trends of the Global Commercial Vehicles Industry', and talked of India's vibrance as a global economy. "India really exemplifies all the trends which are now shaping the global vehicle industry", he said.

Mr Ravi Pisharody, Executive Director - Commercial Vehicles, Tata Motors, gave the closing address at Keynote Session 1: "In the emerging market, particularly BRIC countries,



Mr Gary Johnson, Vice President, Manufacturing, Ford Asia Pacific, making a presentation at the SIAM Annual Convention

it looks like the industry is set to thrive, grow and lead." he said.



Mr Philippe Divry, Senior Vice President, Truck Joint Ventures, Volvo AB and Board Member, VE Commercial Vehicles, making a presentation at the SIAM Annual Convention



(from L To R) on the dais Mr K N Radhakrishnan, President & CEO, TVS Motor Company, Mr Kamal Nath, Honorable Minister for Urban Development, Dr Pawan Goenka, Past President, SIAM and Mr Sugato Sen, Dy. Director General, SIAM



Dr John Chacko, President & Managing Director, Volkswagen India delivering the opening remarks at the Keynote session and on the dais (from L to R) Mr Marc Nassif, Country Managing Director, Renault India, Mr Pete Kelly, Managing Director, LMC Automotive, UK, Mr Felix Kunhert, European Automotive Leader, PricewaterhouseCoopers, Germany and Mr Sushil Kumar, Advisor, SIAM.

Special Plenary Session 1 - Auto Industry: India in Changing World Order

The Special Plenary Session 1 was addressed by Mr Kamal Nath, Hon'ble Minister for Urban Development. Dr Pawan Goenka, Past President, SIAM & President, Automotive & Farm Equipments, Mahindra & Mahindra chaired the Session and Closing Remarks were given by Mr K N Radhakrishnan, President & CEO, TVS Motor Company

Mr Kamal Nath, Hon'ble Minister for Urban Development spoke on the evolution of the scale and the innovations in the auto industry. He also commented on witnessing cyclical changes in the industry.

He also spoke on the need for global competitiveness as a critical aspect of globalization. "At the heart of globalization lies global competitiveness, and unless you are globally competitive, you can't survive." He further added: "It is this global competitiveness which is going to be the future of the automobile industry."

He also spoke on India's young population as the reason behind the nation's emergence and the impact of urbanization on the auto industry.

Keynote Session 2: Role of India in Global Auto Economy

Dr John Chacko, President & Managing Director, Volkswagen India chaired the Session

and delivered the opening welcome remarks. Mr Pete Kelly, Managing Director, LMC Automotive, UK, spoke on "Tides of Change in the Global Light Vehicle Industry" and Mr Felix Kuhnert, European Automotive Leader, PricewaterhouseCoopers, Germany presented the "European Automotive Outlook"

Mr. Marc Nassif, Country Managing Director, Renault India delivered the Closing Remarks for the session.



Mr Pete Kelly, Managing Director, LMC Automotive, UK making a presentation at the session



Mr Felix Kunhert, European Automotive Leader, Pricewaterhouse Coopers, Germany making a presentation at the session



Plenary Session 2: "Managing Growth Challenges in an Environment of Paradox" (from L to R) on the dais Mr Anirudh Bhuwalka, Managing Director, Asia Motor Work Ltd, Mr Jitin Prasada, Honorable Minister of State for Road Transport & Highways, Mr Lowell Paddock, President & Managing Director, General Motors India, Mr Saugata Roy, Honorable Minister of State for Urban Development

Plenary Session 2: Managing Growth Challenges in an Environment of Paradox

Mr Lowell Paddock, President & Managing Director, General Motors India, delivered the Opening Remarks.

The session was addressed by Mr Jitin Prasada, Hon'ble Minister of State for Road Transport & Highways, and Mr Saugata Roy, Hon'ble Minister of State for Urban Development.

Mr Anirudh Bhuwalka, Managing Director, Asia Motor Works provided Closing Remarks.



Mr Jitin Prasada, Honorable Minister of State for Road Transport & Highways addressing the gathering



Mr Saugata Roy, Honorable Minister of State for Urban Development addressing the gathering

Panel Discussion: Managing Growth in Changing World Order

Mr Rajiv Bajaj, Managing Director, Bajaj Auto delivered the Opening Remarks at the panel discussion.

Dr Goetz Klink, Global Automotive Practice Head, A T Kearney moderated the discussion.

The discussion panel consisted of:

- Mr S Sundareshan, Secretary, Ministry of Heavy Industries & Public Enterprises
- Mr S R Rao, Secretary, Ministry of Commerce & Industry
- Dr Sudhir Krishna, Secretary, Ministry of Urban Development

Speaking on the Indian government's role in the automobile sector, Mr S Sundareshan, Secretary, Ministry of Heavy Industry & Public Enterprises talked of upcoming government investment and participation in the sector: He announced the Government's decision to form the National Automotive Board as an independent body to be a nodal point in Government on all matters concerning the automotive industry specially in terms of technical knowledge, regulation and policy formulation, certification and international technical coordination. He also spoke about the status of the NATRIP Project.

Speaking on the establishment of the Mission for Electric Mobility, he said: "It is envisaged

“Auto Industry : India In Changing World Order”



Panel Discussion : “Managing Growth in Changing World Order” (from L to R) on the dais Dr Goetz Klink, Global Automotive Practice Head, A T Kearney, Mr Sanjiv Kumar, CEO Automotive Engines Business, Greaves Cotton, Dr Sudhir Krishna, Secretary, Ministry of Urban Development, Mr S Sundaresan, Secretary, Ministry of Heavy Industries & Public Enterprises, Mr Rajiv Bajaj, Managing Director, Bajaj Auto Ltd and Mr S R Rao, Secretary, Ministry of Commerce & Industry

that over the next 6-7 years, the government will be spending between 2-3 billion dollars to make this program attractive, the total investment is between 4-5 billion dollars. We expect this program be put in place and launched in the next 2-3 months.”

Mr S R Rao, Secretary, Ministry of Commerce & Industry spoke on the need to support exports for automobile sector. “It is expected by 2015, that 50% of the world trade will essentially be between developing economies. We need to align our policies and our activities within this sector to match the growing demand. On the exports front, the automotive industry’s contribution has not been matching with what we thought was the possibility.”

Dr Sudhir Krishna, Secretary, Ministry of Urban Development spoke on the need for planned urbanization and mobility-based planning in the planning of cities. “In partnership with sister ministries and state governments, we have launched a series of Mass Rapid Transit projects spearheaded by the metro rail projects. Talking further on public transport infrastructure, he added: “Mini buses need to be given greater attention. The network of roads in our cities is unable to handle large buses. As a result, many areas do not have the benefit of connectivity.”

Mr Sanjiv Kumar, CEO, Automotive Engines

Business, Greaves Cotton gave the Closing Remarks

Industry Leader’s Session

Mr Vikram S Kirloskar, Vice President, SIAM & Vice Chairman, Toyota Kirloskar Motor gave the Opening Remarks at the session. Closing the SIAM Convention during the Industry Leader’s Session, Mr Adi Godrej, President of CII and Chief of Godrej Group, called for the extension of interest subvention scheme to more sectors like automobiles and engineering to boost exports. He focused on the need for freight subsidy for entering new markets and a creation of export development fund for aiding SMEs. He also called for multi-pronged strategy for reviving the deepening industrial slowdown.

Mr Michael Boneham, President & Managing Director, Ford India gave the Closing Remarks to the Industry Leader’s Session.



(from L to R) Mr Michael Boneham, Treasurer, SIAM and President & Managing Director, Ford India, Mr Adi Godrej, President, CII and Chief of Godrej Group, Mr Vikram S Kirloskar, Vice President, SIAM & Vice Chairman, Toyota Kirloskar Motor and Mr K K Gandhi, Executive Director, SIAM

INTERNATIONAL BUS & UTILITY VEHICLE SHOW 2013

15-18 February 2013, India Expo Mart, Greater Noida, Delhi NCR



(L-R): Mr Prasann Firodia, Managing Director, Force Motors India; Dr M F Farooqui, Secretary, Department of Heavy Industries, Govt. of India; Dr Sudhir Krishna, Secretary, Ministry of Urban Development; Mr S Sandilya, President, SIAM; Mr S K Lohia, OSD, Ministry of Urban Development; Mr Vishnu Mathur, Director General, SIAM

The International Bus & Utility Vehicle Show (IBUS) 2013 was organised by the Society of Indian Automobile Manufacturers (SIAM), with Automotive Component Manufacturers Association of India (ACMA) and Confederation of Indian Industry (CII) as National Partners. The show was supported by Ministry of Heavy Industries & Public Enterprises, Association of State Road Undertakings (ASRTU) and Indo-German Chamber of Commerce (IGCC) and was held successfully from 15-18 February 2013 at India Expo Mart, Greater Noida, Delhi NCR, India.

The Show was inaugurated jointly by Dr Sudhir Krishna, Secretary Ministry of Urban Development, Govt. of India, and Mr M F Farooqui, Secretary Department of Heavy Industry, Ministry of Heavy Industry and Public Enterprises, Govt. of India. Mr S K Lohia, OSD, Ministry of Urban Development, Govt. of India also spoke on the occasion.

IBUS 2013 spread across 10,500 sqms received encouraging response from the industry with the presence of major automobile manufacturers along with accessories, tyres and other related manufacturers and service providers. During the show a round table discussion on "Handling of New Generation Buses" was organised by SIAM in association with ASRTU which was attended by various STU representatives and SIAM members.



Participants at the Roundtable on "Handling of New Generation Buses".



Mr S Bandopadhyaya, Jt. Secretary, Ministry of Road Transport & Highways and Mr S K Lohia, OSD, Ministry of Urban Development with Mr Vishnu Mathur, Director General, and Mr Sugato Sen Dy. Director General, SIAM

At IBUS 2013, Force Motors launched its EOV "GURKHA (4x4x4)". Tata Motors and Ashok Leyland displayed their new range of products with latest technologies.

IBUS 2013 recorded attendance of over 3,500 business visitors and general visitors. In addition the event generated a very good number of business enquiries. The show also witnessed visits by members of Contract Bus Association, members of Indian Association of Tour Operators, members of Indian Association of Bus Manufacturers, State Road Transport Undertakings, Officials of ASRTU, Government Officials from various Ministries of Government of India, Private Hospitals, School & Educational Institute Managements, Travel Houses, Accessories and Component Manufacturers, Auto Dealers, Body Builders, Traders, Consulates, elite individuals and the general public.



SIAM members at exhibition stall

Live performance by bands were organised during the show to entertain visitors. An hourly lucky draw for visitors was organised on all days of the show, winners were gifted with IBUS branded souvenirs to engage the visitors more closely.

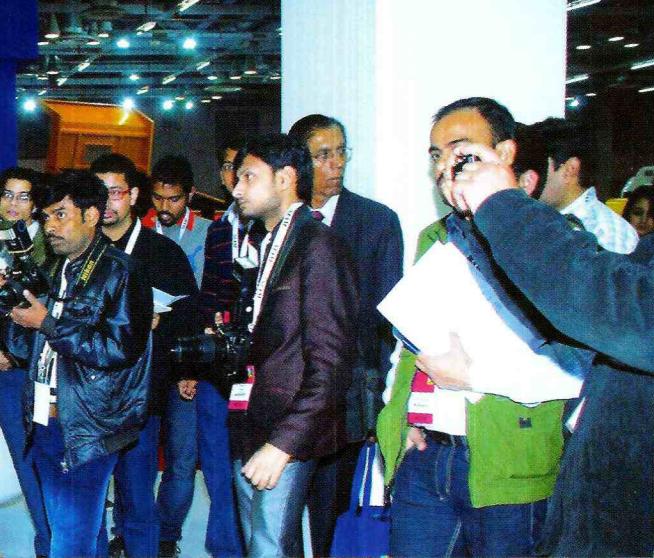
Some of the major participants at IBUS 2013 included Apollo Tyres, Ashok Leyland, Force Motors, Mahindra & Mahindra, Nissan Motors, SML ISUZU, Tata Motors and others.



Gathering at the Inaugural Session of the BUS & UV Show



SIAM Members displaying their vehicle



FELICITATION OF DOYENS OF AUTOMOTIVE INDUSTRY



(L-R): Mr Vikram Kirloskar, Vice President, SIAM; Mr S Sandilya, President, SIAM; Mr Ratan Tata, Chairman, Tata Group; Mr R J Shahaney, Past President, AIAM; Mr Surinder Kanwar, President, ACMA; Mr Harish Lakshman, Vice President, ACMA.

In recognition of their commitment, perseverance and vision that has inspired growth, and excellence in India's automobile and allied industries which helped establish India's presence in the global market, SIAM and ACMA jointly organised a felicitation function for Mr Ram J Shahaney, Mr Keshub

Mahindra and Mr Ratan Tata on 21st February 2013 at Mumbai.

Mr S Sandilya, President, SIAM and Mr Surinder Kanwar, President, ACMA along with Past Presidents and members of SIAM and ACMA felicitated the Doyens of Indian Automotive Industry.



Mr S Sandilya, President, SIAM felicitating Mr R J Shahaney, Past President, AIAM



Mr Deep Kapuria, Past President, ACMA (left); and Mr R Seshasayee, Past President, SIAM (right) felicitating Mr Ratan Tata, Chairman, Tata Group



Mr Arun Nanda, Director, Mahindra & Mahindra receiving the citations on behalf of Mr Keshub Mahindra, Past President, AIAM



Audience at the felicitation ceremony

ECONOMIC AGENDA



(L-R): Mr Sugato Sen, Dy. Director General, SIAM;
Mr Shekar Viswanathan, Vice Chairman, Toyota Kirloskar Motors;
Mr D D Goyal, Vice President (Finance), Maruti Suzuki India at SIAM
Taxation and Finance Leasing and Insurance Group Meeting



Members at Taxation Policy Group Meeting

SIAM Taxation Policy, Procedure and Direct Tax Groups

SIAM Taxation Policy, Procedure and Direct Tax Groups comprise of the taxation and finance division heads of member companies. These three groups have similar set of members, however are chaired and co-chaired by different people. SIAM Taxation Policy Group is chaired by Mr Shekar Viswanathan, Vice Chairman & Whole Time Director, Toyota Kirloskar Motor Pvt. Ltd and co-chaired by Mr R Sethuraman, Senior Vice President (Finance), Hyundai Motor India. SIAM Taxation Procedure Group is chaired by Mr D D Goyal, Vice President (Finance), Maruti Suzuki India and co-chaired by Mr Mohan Raghavan, Vice President (Excise), Mahindra & Mahindra. SIAM Direct Tax Group is chaired by Mr T Anantharaman, GM - Tax & Finance, Mercedes Benz. The three groups' together look into all concerns with regards to taxation matters.

The regular activities of these Groups include:

1. Submission of suggestions for the Union Budget – Pre-Budget and Post Budget
2. Regular interaction with the Government on taxation concerns

The groups meet regularly to deliberate on the concerns faced at company level and also share

with each other the best practices within their organization.

In the last one year, the groups met many a times and senior level delegations from SIAM met senior officials at Ministry of Finance regularly to discuss various important & critical issues faced by the automobile industry.

SIAM taxation groups in their meetings discussed the Supreme Court verdict on the FIAT India case and its potential impact on the industry. Members had inputs from KPMG and Lakshmikumaran & Sridharan on the facts of the Fiat case, and the issues that could emerge for the industry as whole. It was suggested that SIAM should approach the Ministry of Finance and request them to make suitable amendments to address the concerns of the Automotive industry.

SIAM presented its pre-budget suggestions to MoF in November 2012 by a team of CEOs led by Mr Vikram Kirloskar, Vice President SIAM, and Vice Chairman, Toyota Kirloskar Motor Pvt Ltd. The meeting was chaired by Shri Sumit Bose, Secretary (Revenue) and was attended by many key officials from excise department and TRU.

SIAM also made a presentation of its pre-budget suggestions to the National Manufacturing Competitiveness Council (NMCC). It also high-

lighted the slowdown being observed in the sales and exports especially in the M&HCV segments, suggested remedial action for M&HCV and requested for support for growth revival.

Union Budget 2013-14

The Union Budget 2013-14 was presented by Hon'ble Finance Minister Mr P Chidambaram on February 28, 2013 in New Delhi. The key announcements relating to the automobile sector were as follows

1. Fund allocation for purchase of up to 10 thousand buses under JNNURM scheme
2. Excise duty on commercial vehicle chassis reduced from 14% to 13%
3. Extension of concession for import of electric and hybrid electric vehicle parts till 31st March 2015
4. Excise duty on SUVs increased from 27% to 30%
5. Custom Duty on cars and UVs valued above USD 40,000 or with engine capacity exceeding 3000cc for petrol and 2500 cc for diesel increased from 75% to 100%
6. Custom Duty on used cars and UVs increased from 100% to 125%
7. Increase in custom duty on motorcycle above 800cc from 60% to 75%
8. Custom Duty exemption on lithium ion automotive battery

Post Union Budget Meetings

A team of CEOs of member companies led by Mr S Sandilya, President (SIAM) met Mr P Chidambaram, Finance Minister in April 2013 to apprise him of the difficulties being faced by the car manufacturers post the Supreme Court Judgment in the FIAT Case. Mr S Sandilya, President briefed the Finance Minister on how Excise Department is applying the decision to the entire industry and is calling for model-wise cost data from the manufacturers while the Supreme Court had itself stated in its decision that FIAT's case was a unique one and may not have universal applicability. He requested for



(L-R): Mr Vishnu Mathur, Director General, SIAM; Mr Vikram Kirloskar, Vice President, SIAM; Mr Shekar Viswanathan, Vice Chairman, Toyota Kirloskar Motors; Mr P Balendran, Vice President (Corporate Affairs), General Motors India at the post Union Budget Meeting

necessary amendments to reiterate the principle of transaction value to be the basis of excise assessment.

SIAM members also met Ms Praveen Mahajan, Chairperson, CBEC, on 15th May, 2013 to apprise her of concerns being faced by the industry. The concerns that were highlighted to the Chairperson are provided below:

- Excise Valuation Concern (Issues arising out of the Supreme Court Judgment in the FIAT case)
- Power to Arrest Provision
- Excise Duty on SUVs

The Chairperson, along with her team, gave a patient hearing to all the concerns. She then informed that the department is seized of the first two issues and has been working to formulate guidelines for field formations on implementation of the above and that the guidelines will be issued very soon. The chairperson informed that the power to arrest provision is exercised rarely and only in extreme cases.

For SUV excise duty, the Chairperson informed that there has been much deliberation on this duty hike within the Ministry. No roll back is possible in this case.

Economic Research Group

SIAM Economic Research Group comprises of the economists and business planners of



SIAM members at Economic Research Group Meeting



(Center): Mr G V Rao, Sr. Vice President (Strategic Planning), VE Comm. Vehicles and Chairman, SIAM Economic Research Group chairing the group meeting

member companies. The group is chaired by Mr G V Rao, Vice President, Volvo Group Product & Brand Strategy, Volvo India and co-chaired by Mr Ashutosh Goel, General Manager, Mahindra & Mahindra. The objective of the group is to understand the research needs of the industry. The group is engaged in demand forecasting exercise for the automobile industry and organises the Looking Ahead Conclave every year in the month of January. SIAM Economic Research Group has commissioned many studies in the past and in the last year, the studies the group has commissioned includes-

- Study on Indian Trucking Industry
- Impact of road and highway development on automobile demand
- Automotive Mission Plan 2026
- Assessment of India's Manufacturing Competitiveness for Automobiles

SIAM Economic Research Group organised a workshop on 'Innovation - Key for Sustainability and Growth' on June 5, 2013. The group now plans to add to its activities an Economic Health Report and organise a training program on different topics every quarter.

SIAM Looking Ahead Conclave

SIAM organised the 7th Looking Ahead Conclave - Leading in Uncertain Times on 10th January 2013 in Hotel The Grand, New Delhi.

The inaugural session of the conclave was addressed by Mr S Sandilya, President SIAM and Chairman Eicher Motors, who set the tone for the ensuing sessions.

In the session on "Buying Behavior of Urban and Rural Customers - Key Differences and Similarities", experts including Mr Alyque Padamsee, President, AP Advertising Pvt Ltd; Mr Anuj Mehra, MD, Mahindra Rural Housing Finance; Ms Preeti Reddy, Senior Vice President, IMRB expressed their views to bring out the story of different characteristics of the urban /rural customers.

CRISIL presented its estimates for future sales which were discussed by panels on commercial and personal vehicles. High profile panel on CV/3W included Mr Naresh Rattan, President & COO - (Corp Sales & Marketing), Force Motors; Mr Anirudh Bhuwalka, Managing Director, AMW; Mr Arun Birla, Executive Vice



Dignitaries at SIAM Looking Ahead Conclave

President-Sales, Marketing & Aftermarket, VE Commercial Vehicles; Mr Rajive Saharia, Executive Director-Marketing, Ashok Leyland. The CV/3W panel discussion was moderated by Mr Vinod Kumar, Senior Principal (Automotive Practice), A T Kearney.

The high profile panel on 4W/2W included Mr Mayank Pareek, COO - Marketing and Sales, Maruti Suzuki; Mr Yadvinder Guleria, Vice President - Sales & Marketing, Honda Motorcycles; Mr Debasis Mitra, Director - Sales & Marketing, Mercedes-Benz India; Mr Jnaneswar Sen, Senior Vice - President, Sales & Marketing, Honda Car India. The 4W/2W panel discussion was moderated Mr Raghuttama Rao, Managing Director, IMacS

Workshop on 'Innovation - Key for Sustainability and Growth'

SIAM organised a workshop on 'Innovation - Key for sustainability and Growth' on 5th July 2013 in Hotel Le Meridien, New Delhi.



Mr Ambuj Sharma, Joint Secretary, Ministry of Heavy Industry and Public Enterprises addressing the gathering at the workshop

The programme was organised in multiple sessions, covering : Innovation and its Importance; Road to Inculcating Innovation in the Corporate Functioning and Learnings from other companies that benefitted due to Innovative Strategies. Mr Ambuj Sharma Joint Secretary, Department of Heavy Industries was the Chief Guest. He cited various examples of innovation done in Government and in Public Sector Units.

Human Capital Group

The group is chaired by Mr Prince Augustin, Executive Vice President (Group Human Capital), Mahindra & Mahindra and co-chaired by Mr Raman Kumar Sharma, Sr. Vice President and Director (General Affairs), Honda Cars India Ltd.

During the year, SIAM worked constantly to help the industry develop improved human resources, through its Human Capital Group activities. The Group has been in constant touch with ACMA and FADA to jointly take up the Industrial Relations (IR) and other issues with the Automobile industry.

The group now closely works with Employers' Federation of India (EFI) that plays a special role as the apex body of employers' organizations and industries on matters concerning labour, human resource management, industrial relations and other related issues. EFI will support the SIAM Human Capital Group in matters relating to Industrial Relations (IR). The Group also felt that a National debate on Human Capital should be created with support from CII, EFI and NHRDN.

Like the earlier years the Group initiated the "Compensation Study" which was conducted by AON Hewitt. Members of the group are actively supporting activities conducted by Automotive Skills Development Corporation (ASDC) during the year. The group also plans to organise the 3rd edition of SIAM HR Conclave in the year 2014.



Members at SIAM Human Capital Group Meeting



Members at SIAM Trade Fairs Group Meeting

Trade Fairs Group

The group is chaired by Mr Arvind Saxena, Managing Director, Volkswagen Group Sales India, and co-chaired Mr Debasish Ray, Head-Corporate Communications, Tata Motors Ltd.

SIAM has announced the plan for expanding its Trade Fair activities for a higher visibility of the industry. The group organised its debut show the " International Bus & Utility Vehicle Show" during 15th - 18th February 2013 at India Expo Mart, Greater Noida.

The group is now working to assist organizing the Nation's biggest Automobile Show "Auto Expo". The Auto Expo will be expanded to cover 2 different venues:

1. Auto Expo - The Motor Show: To be scheduled from 5th - 11th February 2014 at India Expo Mart, Greater Noida.
2. Auto Expo - The Component Show: To be scheduled from 7th - 10th February 2014 at Pragati Maidan.



(R - L) Mr Sugato Sen, Deputy Director General, SIAM and Mr Arvind Saxena, Chairman SIAM Trade Fair Group and Managing Director - Passenger Cars, Volkswagen India at the Trade Fairs Group Meeting

The Show jointly organised by ACMA, CII and SIAM would provide Automobile and Component manufacturers a platform to display their latest offerings to end users without space constraint. This will also enable new companies to participate in the show.

INTERNATIONAL ENGAGEMENTS

SIAM Participation in APEC Automotive Dialogue

APEC Automotive Dialogue: October 2012, St. Petersburg, Russia

SIAM participated in the 17th meeting of the Automotive Dialogue (AD) held in St. Petersburg, Russia in October 2012.

The meeting was attended by government and industry representatives from China, Indonesia, Japan, Korea, Malaysia, Philippines, Russia, Chinese Taipei, Thailand, the United States of America and Vietnam. SIAM was represented by Mr A S Puri, Chairman, SIAM International Relations Group and Vice President (Govt. Affairs & Collaborations), Tata Motors, and Mr Sugato Sen, Deputy Director General, SIAM. SIAM made a presentation on the current status of the Indian auto industry to the participants.

APEC Automotive Dialogue: April 2013, Yogyakarta, Indonesia

SIAM participated in the 18th meeting of the APEC Automotive Dialogue (AD) held in Yogyakarta, Indonesia in April 2013.

SIAM was represented by Mr A S Puri, Chairman, SIAM International Relations Group and Vice President (Govt. Affairs & Collaborations), Tata Motors, and Mr Sugato Sen, Deputy Director General, SIAM. SIAM made several presentations to the participants, including presentations on topics such as experience with hybrid and electric vehicles, how auto tax structures have been moving



Participants at APEC Meet



Participants at IMMA Annual General Meeting held in USA

in India during the last three years and its impact on markets, Latest statistics on auto production, sales, exports, imports and new auto policies, Regional FTAs and Integration Update and SIAM views on WP/29 – 1998 and 1958 Agreement and on IWVTA.

China Auto Forum 2013

SIAM was invited to participate in China Auto Forum 2013, held at Shanghai, China in April 2013. SIAM was represented by Mr Sugato Sen, Deputy Director General, SIAM.

He made a presentation on the Indian Consumer Preferences at the forum.

OICA Meeting

SIAM team visited Istanbul, Turkey for the General Assembly of OICA in November, 2012. SIAM team comprised of Mr Rahul Bharti, Co-Chairman, SIAM International Relations Group and Head (Corporate & Govt. Affairs), Maruti Suzuki India, Mr Vishnu Mathur, Director General, SIAM and Mr Sugato Sen, Deputy Director General, SIAM.

SIAM team also participated in the Exhibition Committee and Selection Committee meeting of OICA. Several important decisions were taken in the OICA General Assembly including decision related to changes in the rules for motor show accreditation. There was also a roundtable on auto industry in ten years where some of the important member economies

presented the state of affairs of the industry in their respective countries.

SIAM participation at IMMA

In the year 2012 SIAM was invited to nominate the President of the International Motorcycle Manufacturers Association (IMMA) based in Geneva. Mr S Sandilya, President SIAM and Chairman, Eicher Motors accepted the request for chairing the same.

Mr S Sandilya as President, IMMA attended all the meetings and also addressed the IMMA General Assembly in May 2013 at Washington, USA.

IMMA aims at facilitating trade, promoting harmonization and formulating global technical regulations to increase safety and environmental performance of Powered Two Wheelers. Mr S Sandilya would lead the IMMA for the period (2012-2014). The next General Assembly of IMMA is also being planned to be held in India in May 2014.

Logistics Group

The SIAM Logistics Group is chaired by Mr M M Singh, Chief Operating Officer (Production), Maruti Suzuki India, and co-chaired by Mr Prem Verma, Chief Operating Officer, TML Distribution Company Ltd. (A Tata Motors Group Co) The Group has members who are senior officials handling the inbound and outbound Logistics of SIAM member



Dr M F Farooqui, Secretary, Department of Heavy Industries, addressing the gathering at Automotive Logistics Conclave

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 has been in touch with the Indian Railways to develop Rail Transportation in addition to transportation by road. They have been in touch with the senior officials of Indian Railways to develop Policies and Wagon designs specifically for automotive transportation.

Automotive Logistics Conclave, February 2013, New Delhi

SIAM organised the first edition of the Automotive Logistics Conclave in New Delhi on 19th

and 20th February 2013. The event had speakers from the Indian Railways, the Dedicated Freight Corridor as well as automotive logistics sectors, and allied industries. The Conclave covered several topics including policy aspects impacting the Automotive Logistics in the country. International speakers also presented their views on how Automotive Logistics is done in their countries. The Conclave was very successful and is likely to be held annually.

Logistics Group Delegation to Germany, May 2013

A delegation of the SIAM Logistics group went to Germany, from 22nd to 24th May 2013. The objective of the visit was to observe the best practices in Automotive Logistics in Germany. The delegation was led by the Chairman of the Logistics Group Mr M M Singh, MEO, Maruti Suzuki India Ltd, and consisted of senior officials from Automobile OEMs and SIAM Secretariat. The delegation visited the logistics facilities and manufacturing plant of Daimler in Sindelfingen and BMW's two wheeler plant in Berlin. The delegation also visited the Trimodal Logistics Compound of a 3PL operator in Neuss. The Trimodal compound handles Finished Vehicle Logistics of the three modes i.e.



Vehicle unloading from Barge at Tri-modal Logistics Compound, Germany



SIAM Delegation at Trimodal Logistics Compound

Road, Rail and Waterways. The compound also had extensive PDI (pre-delivery inspection) and repair/restoration facilities. The visit proved to be very insightful for the SIAM delegation.

Visit to the Krishnapatnam Port, June 2013, Andhra Pradesh to explore use of Waterways

A meeting of the SIAM Logistics group was held on 17th June 2013 at the Krishnapatnam Port, Andhra Pradesh. The group had a tour of the port and observed various facilities present there, such as the Loading/Unloading facility for Bulk Cargo and Containers. The port has plans to come up with a RoRo terminal to facilitate the export import of finished vehicles from there.

The group also explored the possibility of Logistics by Waterways using these services in future.

Visit to a Wagon manufacturer Kolkata Regarding Auto Wagon Design.

SIAM took a Logistics group delegation to Kolkata to review the prototype of the COR (Car on Rail) wagon being developed and manufactured by Titagarh Wagons Ltd. (TWL), in co-ordination with APL Logistics. SIAM members held interactive discussions, with both

TWL and APL, about suitability of the wagon design for transporting respective vehicles and the difficulties envisaged. They also saw the prototype under manufacture. The design is presently under testing with RDSO.

Sourcing Group

The SIAM Sourcing Group is chaired by Mr Sudam Maitra, Chief Operating Officer (Supply Chain), Maruti Suzuki India and co-chaired by Mr B B Parekh, Chief (Strategic Sourcing), Tata Motors Ltd. The group deliberates on all aspects pertaining of sourcing of inputs for the OEMs.



(L-R): Mr Sushil Kumar, Advisor, SIAM, Mr P Balendran, Vice President (Corporate Affairs), General Motors India; Mr Sanjay Arole, Dy. General Manager (QA), Volkswagen India at a Group Meeting discussing steel BIS Marking issue



Mr B B Parekh, Chief (Strategic Sourcing) Tata Motors Ltd. chairing the Sourcing Group Meeting

SIAM-ACMA Ferrous Castings Study

SIAM and ACMA in a joint meeting identified Automotive Ferrous Castings as an area of concern. It was decided to

commission a joint study on "Mitigating supply challenges in Indian Automotive Ferrous Casting Industry". the study would cover the gaps in supply-demand scenario of Automotive Ferrous Castings in India and steps to mitigate the challenges. The report on this study is expected to be available by the end of third quarter of FY-14.

White Paper on the exemption of BIS marking on Automotive Steel

With the BIS Marking on Galvanised steel sheets being made mandatory, members who are importing steel to strict international and company standards were facing problems. To highlight this SIAM submitted a White Paper on exemption from mandatory marking for auto grade steel.

BIS has since set up a mechanism to grant case to case exemption to OEMs for importing steel.

Participation in CIAPE, October 2012, Beijing

Senior officials from member Companies and SIAM Secretariat participated in the annual China International Auto Parts Expo, held in Beijing, from 26th to 28th October 2012. SIAM was also provided with a stall. Members also had one to one meetings with prospective component suppliers in China.

Finance, Leasing, & Insurance Group

SIAM Finance, Leasing and Insurance Group comprises of the finance division heads of member companies. The group is chaired by Mr Ajay Seth, Executive Director & Chief Financial Officer, Maruti Suzuki India and co-chaired by Mr Lalit Malik, Chief Financial Officer, Eicher Motors. The group looks into all concerns with regards to finance, leasing and insurance matters. The group also holds workshops with leasing and insurance companies regularly.

The group, jointly with the SIAM Taxation



(L-R): Mr D D Goyal, Vice President (Finance), Maruti Suzuki India; Mr Sugato Sen, Dy. Director General, SIAM; Mr Shekar Viswanathan, Vice Chairman, Toyota Kirloskar Motors; Mr Ajay Seth, Chief Financial Officer, Executive Director and Maruti Suzuki India at the SIAM Finance, Leasing & Insurance Group Meeting

Policy & Procedure Groups, met in September 2012 to understand Supreme Court verdict in the FIAT India case and its potential impact on the industry.

Vehicle Classification Group

The Group is chaired by Mr Jnaneshwar Sen, Sr. Vice President (Sales & marketing), Honda Cars India and co-chaired by Mr N K Rattan COO, Tractor Business and President (Corporate Sales & Marketing, Force Motors Ltd.

Reclassification of M&HCV (Goods Carrier)

SIAM Vehicle Classification group discussed Reclassification of M&HCV (Goods Carrier). After some deliberation, the group members finally decided to reclassify the N3 (B2) segment of this category. The revised classification is as below:



(L-R): Mr Sugato Sen, Dy. Director General, SIAM; Mr Jnaneshwar Sen, Sr. Vice President (Sales & Mktg.), Honda Car India; Mr N K Rattan, COO (Tractor Business) & President (Corporate Sales & Mktg.), Force Motors India at SIAM Vehicle Classification, Sales Reporting and Analysis Group Meeting

- (a) Mass exceeding 16.2 tonnes but not exceeding 26.4 tonnes
- (b) Mass exceeding 26.4 tonnes but not exceeding 35.2 tonnes
- (c) Mass exceeding 35.2 tonnes but not exceeding 40.2 tonnes
- (d) Mass exceeding 40.2 tonnes but not exceeding 44 tonnes
- (e) Mass exceeding 44 tonnes but not exceeding 49 tonnes
- (f) Mass exceeding 49 tonnes and above

Export Group

The Group is chaired by Mr P N Shah, Chief Executive (Automotive), Mahindra & Mahindra and co-chaired by Mr H S Goindi, President (Marketing), TVS Motors .



Members at SIAM Export Group Meeting

Suggestions for the Foreign Trade Policy (2013-14) by SIAM

SIAM submitted several suggestions, collected from the member companies, for the Foreign Trade Policy (2013-14). The submission included suggestions to include new markets and requested the government to negotiate with a few countries to improve the exports from India. Some of the important export markets from the Auto trade point of view were - Sri Lanka, Pakistan, Chile and Myanmar. The FTA with Chile was also one of the points in the submission, since signing this FTA would be beneficial for the Indian Automobile Industry.

Duty Drawback meeting, May 2013, Chennai

Senior officials from SIAM Members participated in the Duty Drawback committee meeting chaired by Dr Saumitra Chaudhuri, Member, Planning Commission and Chairman, Drawback Committee. SIAM members presented their concerns and recommendations to the Drawback Committee and made a request to restore the old Drawback Rates prevailing before the revision in last October. The committee suggested that SIAM may request for the data from passenger car manufacturers as well as two wheeler manufacturers to be submitted to the Drawback Division. The Chairman also asked a few commercial vehicle manufacturers, to submit the Drawback Rate calculations to enable a fair assessment.

SIAM also suggested Drawback benefit on rupee trade export to the landlocked countries like Nepal and Bhutan. India's passenger cars face price competition with European models imported into these markets and Drawback benefit will help to reduce the duty impact on the prices and make the Indian prices competitive.

Trade Policy Group

SIAM Trade Policy Group comprises of the international business, exports and business development heads of member companies. The group is chaired by Mr Ketan Doshi, Head - New Business Development, Mahindra & Mahindra and co-chaired by Mr S Ravikumar, Vice President (Business Development), Bajaj Auto. The group deliberates on trade agreements and trade policy related concerns.

SIAM Trade Policy Group had submitted a 'Whitepaper on India's Free Trade Agreements - SIAM Position and Rationale' to Ministers, Members of Parliament and Bureaucrats in April 2013. The whitepaper focused on the

concerns with regard to on-going negotiations on Free Trade Agreements with various nations and regional clusters. It emphasized on the fact that in many FTAs signed earlier we have lost more than we have gained. Hence a comprehensive study needs to be done to understand implications before we sign these agreements so that as a nation we stand to gain and improve our balance of trade.

White Paper

INDIA'S FREE TRADE AGREEMENTS
SIAM POSITION AND RATIONALE

SIAM
Society of Indian Automobile Manufacturers

April 2013

Service Heads Group

The Group is chaired by Mr Pankaj Narula, Maruti Suzuki India Ltd and co-chaired by Mr Rakesh Mukhija, Hero MotoCorp Ltd.

The Group had periodic interactions to share best practices amongst SIAM members, including use of more energy efficient servicing technologies.

The group organised a meeting with the Central Pollution Control Board (CPCB) for formulating of Environmental Standards & Good Practices and Effluent Standards for Automobile Service Stations.



Visit to the I & C Center at Burari in presence of Mr. Anil Chikara, MLO – MoRTH

The group is also working on the Inspection and Certification regime proposed by government for in use private vehicles.

IT Group

The Group is chaired of Mr Vijay Sethi, Hero MotoCorp Ltd and co-chaired of Mr Bishwanath Ghosh, Mahindra and Mahindra.

The group is working on standardization of Electronic Data interchange between OEMs and Suppliers, and a Pilot is to begin shortly. The Group conducted awareness sessions on this initiative in New Delhi & Chennai to update the members on the progress and to understand the pilot phase and implementation aspects, including the roadmap. Members have expressed interest and keenness to join the efforts of the SIAM-ACMA Committee.



Members at SIAM IT Group Meeting

TECHNICAL AGENDA

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 Group; and Gaseous Fuel.

Frontier Technology Group

The group continued its involvement from the previous year in the major initiative led by Department of Heavy Industry, Government of India on electric mobility. One of the major milestones achieved was launch of National Electric Mobility Mission Plan (NEMMP) 2020 by Hon'ble Prime Minister of India, Dr Manmohan Singh on 9th January 2013. The Group will continue to remain engaged during the process of formulation of policies from the recommendation of the NEMMP 2020 by Government of India, and facilitate their implementation.

Few members of the group joined a Government delegation led by Mr Ambuj Sharma, Joint



Hon'ble Prime Minister of India, Dr Manmohan Singh, addressing the gathering at the launch



Govt. Delegation of India to The Netherlands

Secretary, Ministry of Heavy Industries and Public Enterprises visited The Netherlands in June 2013. The major objective was to understand Netherland's initiatives on electric mobility. Pilots on electric transportation were visited in the city of Amsterdam to explore possibilities of undertaking similar projects in India to bring awareness amongst stakeholders and the masses. To further the efforts on electric mobility, the group has agreed to host a World Conference on Hybrid and Electric Mobility on 6th February 2014 in Greater Noida, Delhi, (NCR). The conference will coincide with the next Auto Expo - The Motor Show to be held from 5th – 11th February, 2014. The theme of the conference will be Industry-Government Partnership for Successful Implementation



(L-R): Mr Praful Patel, Hon'ble Minister, MoH&I & PE; Dr Manmohan Singh, Hon'ble Prime Minister of India; Dr Montek Singh Ahluwalia, Dy. Chairman Planning Commission, at the launch of NEMMP 2020



Indian delegation at a laboratory at Eindhoven

of Electric Mobility Program. Speakers from Government, Industry, Academia, Advisory Groups, Consumer Groups will be invited from across the world to share their perspective and information on success stories.

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. During the year, the group drafted a proposed End of Life of Vehicle (ELV) Regulation for India. The group is also involved in government meetings/initiatives on evolving the unorganised ELV sector in India. The group is learning from the experiences of other countries where ELV regulation are in practice.

Diesel Image Group

SIAM Diesel Image Group chaired by Mr Anant J Talaulicar, Chairman & Managing Director, Cummins India had meetings to review the status of the proposed additional tax



(L-R): Mr Jitin Prasada, Minister of State, Ministry of Human Resource Development, Mr Anant J Talaulicar, CMD, Cummins India Ltd, Mr Praful Patel, Hon'ble Minister, MoHIL& PE and Mr Vikram Kirloskar, Vice Chairman, Toyota Kirloskar Motors

of diesel passenger cars and several representations were made by SIAM to Government to create the right awareness on this subject. The group organised a conference on 29th November 2012 at Hotel Taj Mahal with the theme "Diesel for Future: Economy & Environment". The delegates addressed the need to recognize diesel as a viable solution for energy security and lower carbon footprint. Strategies were also suggested on pricing and taxation to enable government integrate diesel as an efficient energy driver for the Transportation sector.

The Ministerial Session was addressed by the Chief Guest Mr. Praful Patel, Hon'ble Minister for Heavy Industries & Public Enterprises and Guest of Honour, Mr Jitin Prasada, Hon'ble Minister of State for Human Resource Development. The conference was also addressed by Mr Vikram S Kirloskar, Vice President, SIAM & Vice Chairman, Toyota Kirloskar Motor, Mr Anant J Talaulicar, Chairman, SIAM Diesel Group and CMD, Cummins India, Mr Lowell Paddock, President & Managing Director, General Motors, Mr Ashok Dhar, President - Industrial Marketing, Reliance Industries, Dr Kirit Parikh, Chairman, IRADe, Mr L N Gupta, Joint Secretary, Ministry of Petroleum & Natural Gas, Mr Sanjay Bandopadhyaya, Joint Secretary, Ministry of Road Transport & Highways and Mr Nitin Gokarn, CEO, NATRIP.



(L- R): Mr Ashok Dhar, President (Industrial Marketing), Reliance Industries; Mr Lowell Paddock, President & Managing Director, General Motors; Dr Kirit Parikh, Chairman, IRADe; Mr Anant J Talaulicar, Chairman, SIAM Diesel Group and CMD, Cummins India

Automotive Infotronics Group

The Group is chaired by Mr G K Binani, General Manager, Tata Motors and Co-Chaired by Mr S Sakthivelan, Dy. General Manager, TKML. This group held discussions on fitment of Radio-Frequency Identification (RFID) Tags, vehicle electronics and intelligent transport systems. The group also had interactions with the Government on the issues like checking of overloading of vehicles by use of RFID Tags, Urban and Ultra Low floor bus electronics requirements, etc.

Styling & Design Group

The group is chaired by Mr Pankaj Jhunja, General Manager, Tata Motors and Co-chaired by Mr Tarun Agarwal, General Manager, Maruti Suzuki India.

SIAM organised 7th Styling & Design Conclave and 5th Automotive Design Challenge (ADC) on 23rd and 24th January in Bangalore. It was a one-and-a-half day event, with a round table format industry-academia interaction on the first day, where senior design professionals had a one-on-one interaction with design students and answered their queries. The Conclave took place on the following day which witnessed participation from design students, professors, senior executives from auto sector and allied industries. Senior government officials, designers, consultants and international speakers from various sectors,



Delegates at SIAM Styling & Design conclave

addressed the audience on the importance of design in the current environment. As a part of the industry-academia interaction, SIAM organised the first edition of the Auto Design Workshop on 25th April, in Pune. It was a regional level event where OEMs based in the western region guided and mentored design students and apprised them on the latest design aspects. Students and design professionals had a one-on-one interaction also, where the skill sets of students were evaluated and valuable tips were passed on.

The group felt that the Styling and Design activities conducted by the group should be highlighted on a larger scale, where all stakeholders could be apprised of their importance. Hence, it was decided that the Facebook page and the website of the group will be upgraded. A moderator and a few senior people of the group will update both of them on a regular basis, to create awareness. Both the tasks have been completed.

Anti-Counterfeiting Group

The Group is chaired by Mr Sanjoy Gupta, Vice President (Customer Care), Mahindra & Mahindra and Co-Chaired by Mr Rajesh Bagga, Vice President (Legal), Tata Motors. Anti-Counterfeiting Group of SIAM represented by various vehicle manufacturers celebrated World Anti-Counterfeiting Day on 8th June 2013 as one of the major initiatives to connect to the customers and society at large to inform



Mr Ambuj Sharma, addressing the gathering at Styling & Design Conclave



Interaction between participants and organisers during World Anti-Counterfeiting Day

the concerns related to the use of spurious auto parts especially when it comes to safety critical parts such as brakes, suspension, headlamps, powertrain components, electrical and electronic systems.

SIAM prepared a Handout for distribution that contained literature on the basic information about spurious parts, their disadvantages and how & why one should abstain from using them. Banners and Posters were also designed by SIAM and shared with members to display the same at numerous dealerships of member companies across the country.

As part of this Pan-India initiative, more than 1075 dealers, stockists and distributors of several vehicle manufacturers including Bajaj, Hero MotoCorp, Hyundai, Mahindra & Mahindra, Tata Motors, Toyota Kirloskar Motor, TVS, Volkswagen India, Volvo Eicher participated in this awareness drive.

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



(L-R): Mr Vishnu Mathur, DG, SIAM; Mr K D Singh, Chairman, SIAM Gaseous Fuel Group, and Sr. GM, MSIL; Mr Rajesh Vedvyas, ED, GAIL

Infrastructure Monitor on quarterly basis which was appreciated by members.

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, Executive Advisor (Engg.), Maruti Suzuki India, respectively. The council reviews and discusses the activities related to groups on Emissions &



(L-R): Mr K K Gandhi, Executive Director, SIAM, Mr Siddhartha Lal, Chairman and Mr I V Rao, Co-Chairman, National & International Regulation Council



Members during SIAM National & International Regulation Council Meeting

Conservation, CMVR & Safety Regulation, Two Wheeler Group, Three Wheeler Group, and International Harmonization Group.

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. SIAM Emissions and Conservation Group



Members at SIAM Emission & Conservation Group meeting

among other issues is actively pursuing the developments in fuel efficiency regulations and is effectively providing inputs to the Government of India's expert committee on Auto Fuel Policy & Vision till 2025.

Two Wheeler Group

The Group is chaired by Mr Harjeet Singh, Vice President, Hero MotoCorp 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.

Governments of India is in the process of revising idle emission limits and introduce a plan for further stringent BS IV emission norms for two wheelers which would also have requirement for Evaporative Emission control.



SIAM Two Wheeler Group

Three Wheeler Group

The Group is chaired by Mr S S Sane, Sr. Vice President (Engg. and R&D), Piaggio Vehicles. SIAM Three Wheeler Group is presently developing a plan for future emission regulation and various safety measures that could be considered for improving the safety of three-wheelers.

CMVR & Safety Regulation Group

CMVR and Safety Regulation Group is chaired by Mr S Ravishankar, Tata Motors Ltd and co-chaired by Mr R Kanitkar, Force Motors. 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 or small groups were created by the group to work on various Automotive Industry Standards (AIS). The group also works on actions taken up in Central Motor Vehicles Technical Standing Committee, Automotive Industry Standard Committee, and Transport Engineering Department (BIS).

International Harmonization Group

The group is chaired by Mr C V Raman, Maruti Suzuki India Limited and co-chaired by Mr P K Banerjee, Tata Motors Ltd. The group reviewed

and discussed Indian Group's activities under WP.29 related to Passive Safety; General Safety Provision; Light & Light Signaling, Brakes and Running Gears, Noise, and Pollution & Energy. The group also discussed emerging technologies for Emissions and Road Safety such as Adaptive Main Beam, Lane Departure Warning Signal (LDWS), Automatic Emergency Braking Systems (AEBS) etc. in the context of Indian requirement.

Annual SIAM-JAMA Technical Group Meeting

The 7th SIAM-JAMA meeting was hosted by SIAM at Mumbai India on 7th November 2012. This was followed by a SIAM-JAMA Two-Wheeler Group meeting on 8th November 2012 and a visit to ARAI for the JAMA delegates. During this meeting information were exchanged between the two organization on several issues. JAMA made detailed

presentations on growth of Hybrid Vehicle, new fuel efficiency regulations for 2020, key components of International Whole Vehicle Type Approval (IWVTA), recycling and recall programs. SIAM also shared the status of safety and emission regulations apart from various subjects presently being deliberated in India such as the Diesel issues, Hybrid and Electrical Vehical (xEV) program, World Light Duty Test Procedure (WLTP), Fuel Quality, Fuel Efficiency, Test facilities, Tyre regulations, AIS 037 issues, Recall and ELV. Japan has also finalized the next stage of emission norms for two-wheelers to be introduced from the year 2016. This regulation has tighter limits for HC & NOx emissions. Japan is also considering to introduce Day Light Running Lamp (DRL), while Automatic Headlamp On (AHO) is already mandated in Japan. Japan also has a tighter idle HC limit for motorcycles of 1,000 or 1,600 ppm.



Annual SIAM-JAMA Technical Group Meeting

PUBLIC POLICY



SAFE and Delhi Traffic Police presented Road Safety Rolling Trophy to the best school working in the area of road safety in New Delhi

Society of Automotive Fitness and Environment (SAFE) 2012-2013

More than 3,500 people are killed every day in road accidents. Different sources state that every year more than a million people (of which one in five are children) are killed throughout the world. In other words, every year we lose one big city, a metropolis. More than 50 million people are injured and crippled. Various studies say by 2020 road accidents will become the third most serious threat to human health, along with circulatory system diseases and certain other problems.

India has the second largest road network in the world with over 3 million km of roads of which 60% are paved. These roads make a vital contribution to the India's economy. On the whole, the facilities for the road users are not up to the mark, leading to a high toll of the death victims. Recently, there is a growing concern over the road crash problem.

The main cause of road accidents is traffic violations, that is what traditionally happens on the roads in various countries – speeding, drunk driving, simply adopting a disrespectful attitude towards others, and a lack of driving

culture. There is a need to create rules at the level of national legislation, rules that would give definite, absolutely clear signals to drivers in all countries.

Road Safety is the responsibility of all, it is an issue that can only be controlled when all stakeholders – State Government, Corporate houses, Auto industry and their associations, Universities, colleges, institutions, schools, NGOs work together.

To make a sustainable and sizable difference in making our roads safer there is a need to increase efforts and SAFE is continuously putting in efforts to achieve the same. To make



Dr Venkat Srinivas, Vice President, SAFE and Special Director (Product Development), Ashok Leyland delivering the welcome address at SAFE Annual Convention 2013 at Shimla



Road Safety Workshop of school students



Two wheeler driving training for Teachers and Students on simulators

road safety a social movement there is a need to do the same in partnership with schools and universities.

SAFE is doing activities with schools and also initiated awards and prizes for best schools doing exemplary work in Road Safety.

SAFE wants to take the road safety message far and wide. SAFE interacts with road users using various communication tools especially with the help of automobile dealer's network. Every year more than 4500 dealers join hands with SAFE in spreading the message of Road Safety to customers, school students, drivers and general citizens during National Road Safety Week in the month of January and Environment Day in the month of June.

Various studies show that driver's fault accounts for more than 70 percent road accidents. Along with stepping up repressive measures on improvement in enforcement,

there is a need to improve training for drivers and pedestrians, provide accident victims with timely quality medical care and, of course, pay special attention to the quality of roads and upgrading road infrastructure. A special topic for our country, as for many countries, is the behaviour of drivers or driving culture.

To address this problem, Ministry of Road Transport & Highways have set out to establish ten model Institutes of Driving Training and Research across the country in consultation with States and automobile manufacturers.

Drivers coming out of such institutes will not only have adequate skill in driving but, will also be fully familiar with various road safety practices.

These Institutes also provide qualified driver-trainers for the driving schools. Members of SAFE like Ashok Leyland and Maruti Suzuki India have assisted ministry in setting up



Road Safety Refresher Driver Training Workshop

these institutes and other members like Eicher, Toyota, Mahindra are also coming up in setting up the driver training institutes.

Along with these institutes, SIAM -SAFE is also assisting ministry by setting up fully automated model Inspection and Certification Center at Chhindwara, Maharashtra.

SAFE also presented views on behalf of automobile industry to the Parliamentary Standing Committee on Transport, Tourism and Culture on examination of Road Safety and related issues to the chairman Mr Sitaram Yechury, Member of Parliament.

SIAM- SAFE have also suggested to the Ministry of Road Transport and Highways to create a National Road Safety and Traffic Management Board. This would be a dedicated agency to oversee road safety activities in the country and would have powers to issue guidelines on a wide range of issues concerning road safety.

SAFE is also working with the ministry on setting up of the Ambulance Code. The main endeavour is to address the problem of delay in providing first aid to accident victims, and shifting them to hospitals.



Free PUC check camp organised during World Environment Day on 5th June 2013

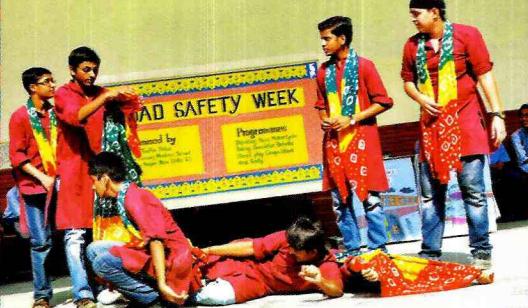
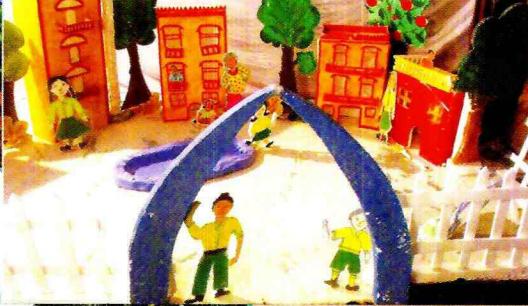
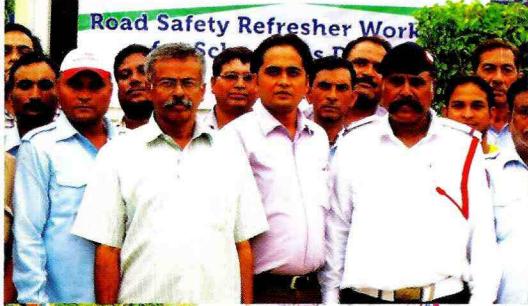
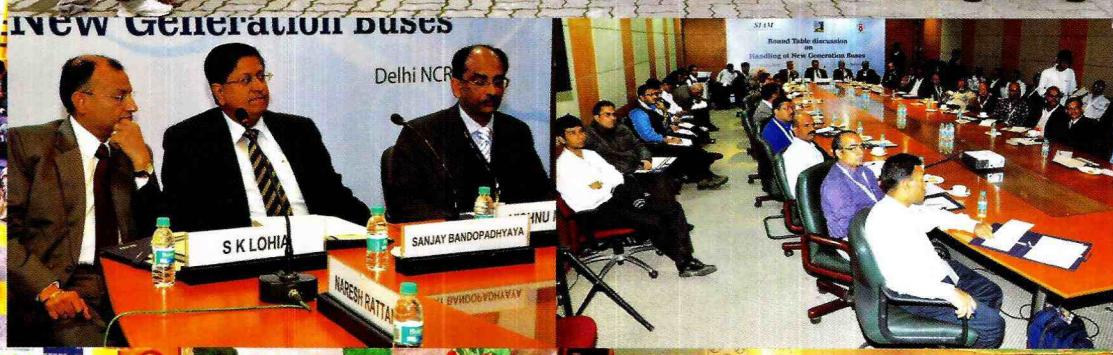
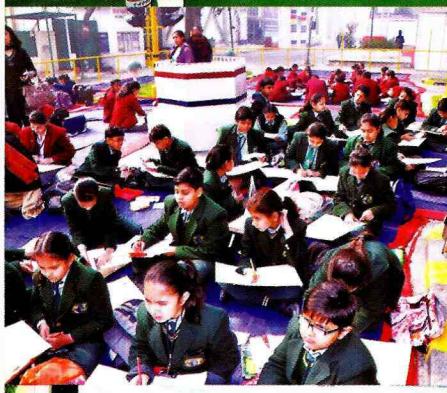
Every year SAFE organises its Annual Convention with a specific theme and the venue is deliberately chosen to cover different states of India. This year the SAFE Annual Convention was held on 25th April 2013 at Shimla with the theme of "Road Safety: Scientific Tools and Training". A Roundtable Discussion was also held on "Future Safety Technologies" on 26th April 2013.

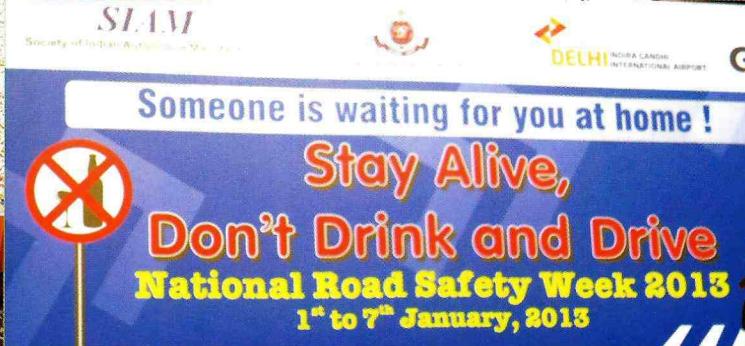


Mr K K Gandhi, Executive Director, SIAM addressing the Roundtable on Future Safety Technologies



Mr Ritesh Chauhan, IAS, Director (Transport), Govt. of Himachal Pradesh addressing the inaugural session of SAFE Annual Convention





OVERVIEW OF AUTO INDUSTRY 2012-2013

Industry Performance in 2012-13

Production

The cumulative production data for April-March 2013 shows production growth of only 1.20 percent over the same period last year. However, during March 2013 the industry produced 1,685,355 vehicles as against 1,845,868 in March 2012, which declined by (-) 8.70 percent.

Domestic Sales

The overall growth in domestic sales during April-March 2013 was 2.61 percent over the same period last year. While in March 2013 overall sales fell by (-) 7.76 percent over March 2012.

Passenger Vehicles segment grew at 2.15 percent during April-March 2013 over same period last year. Passenger Cars declined by (-) 6.69 percent, Utility Vehicles grew by 52.20 percent and Vans grew only by 1.08 percent during April-March 2013 as compared to the same period last year. However, in March 2013 passenger car sales further declined by (-) 22.51 percent over March 2012. Total passenger vehicles sales also declined by (-) 13.01 percent in March 2013 over same month last year.

The overall Commercial Vehicles segment registered de-growth of (-) -2.02 percent in April-March 2013 as compared to the same period last year. While Medium & Heavy Commercial Vehicles (M&HCVs) declined by (-) 23.18 percent, Light Commercial Vehicles

grew at 14.04 percent. In March 2013, M&HCVs sales further declined by (-) 26.16 percent over March 2012.

Three Wheelers sales grew by 4.87 percent in April-March 2013. Passenger Carriers grew by 8.58 percent during April-March 2013 and Goods Carriers registered de-growth at (-) 9.20 percent during this period.

Two Wheelers registered growth of only 2.90 percent during April-March 2013. Scooters, mopeds and motorcycles grew by 14.24 percent, 1.53 percent and 0.12 percent respectively over same period last year. However, in March 2013 all sub-segments of two wheelers, scooters, motorcycles and mopeds registered de-growth at (-) 3.18 percent, (-) 8.32 percent and (-) 4.54 percent respectively.

Exports

During April-March 2013, overall automobile exports registered de-growth of (-) 1.34 percent compared to the same period last year. Passenger Vehicles grew by 9.02 percent, while the other segments like Commercial Vehicles, Three Wheelers and Two Wheelers fell by (-) 13.35 percent, (-) 16.22 percent and (-) 0.72 percent respectively. In March 2013, Passenger Vehicles, Two & Three Wheelers grew by 3.07 percent, 3.51 percent and 7.50 percent respectively. While Commercial Vehicles declined by (-) 28.33 percent.

Automobile Production Trends

Category	(Number of Vehicles)					
	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13
Passenger Cars	1,426,212	1,516,967	1,932,620	2,453,097	2,537,170	2,429,199
Utility Vehicles	246,038	219,498	272,883	313,142	370,945	564,928
Vans	105,333	102,128	151,908	216,533	237,954	239,434
Total Passenger Vehicles	1,777,583	1,838,593	2,357,411	2,982,772	3,146,069	3,233,561
M&HCVs	294,957	192,283	250,133	345,818	384,801	278,560
LCVs	254,049	224,587	317,423	414,917	544,335	553,184
Total Commercial Vehicles	549,006	416,870	567,556	760,735	929,136	831,744
Three Wheelers	500,660	497,020	619,194	799,553	879,289	839,742
Scooters	1,074,933	1,161,276	1,494,409	2,134,585	2,659,340	3,025,014
Motorcycles	6,503,532	6,798,118	8,444,857	10,510,189	11,982,669	11,904,212
Mopeds	430,827	436,219	571,070	704,575	785,523	791,954
Electric Two Wheelers	17,389	24,179	2,567	-	-	-
Total Two Wheelers	8,026,681	8,419,792	10,512,903	13,349,349	15,427,532	15,721,180
Grand Total	10,853,930	11,172,275	14,057,064	17,892,409	20,382,026	20,626,227

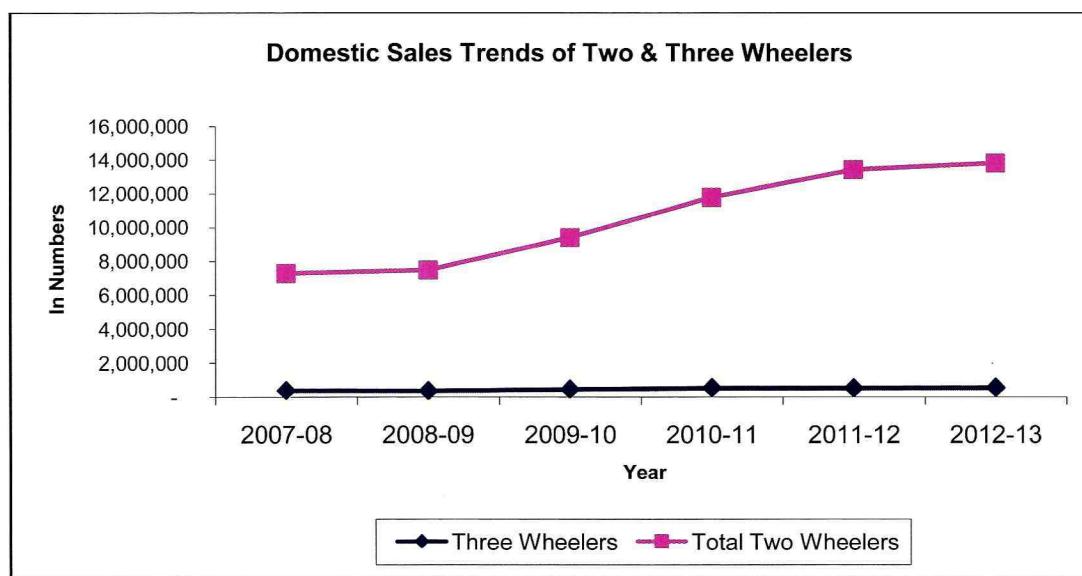
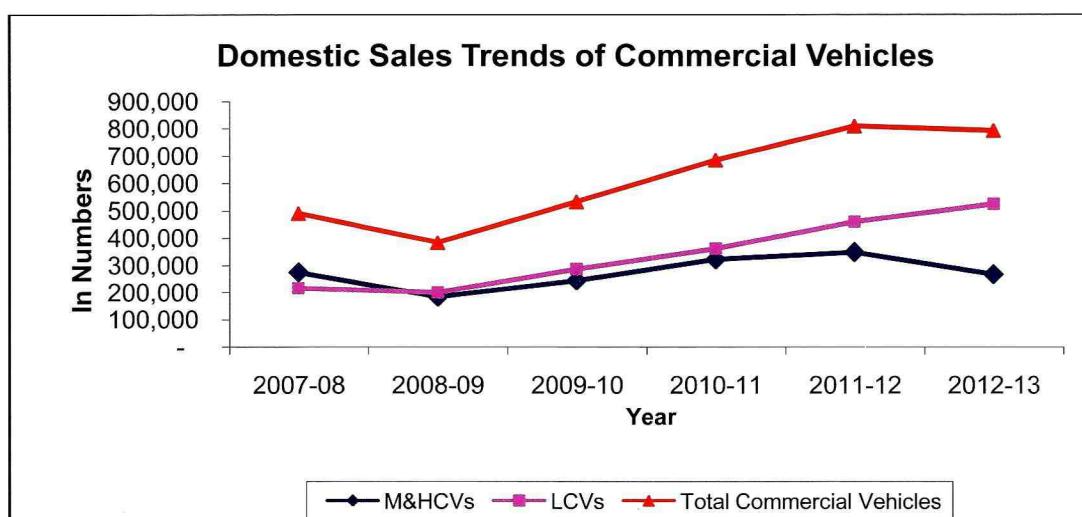
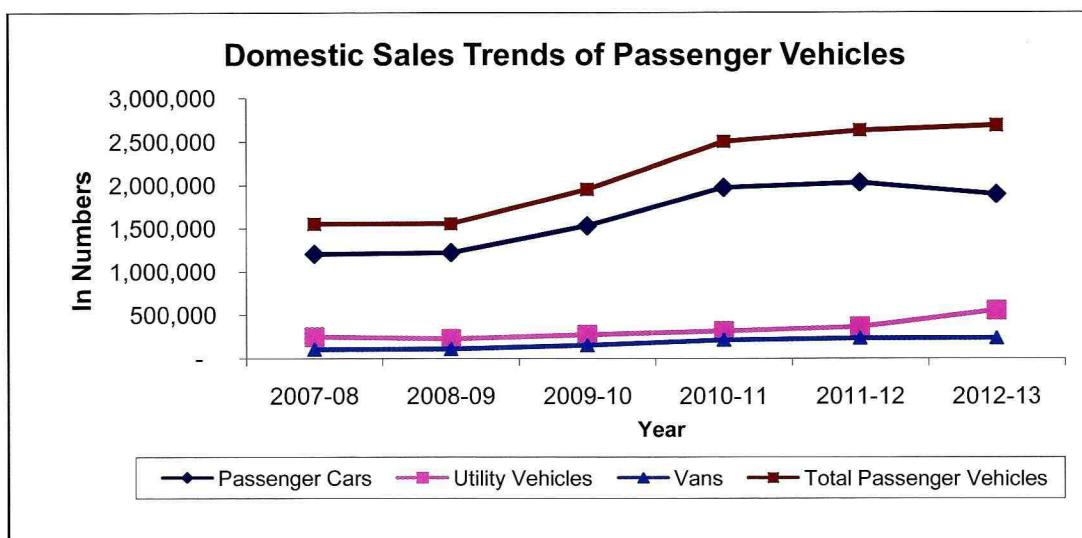
Automobile Domestic Sales Trends

Category	(Number of Vehicles)					
	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13
Passenger Cars	1,203,733	1,220,475	1,528,337	1,972,845	2,031,306	1,895,471
Utility Vehicles	245,284	225,621	272,740	315,123	363,772	553,660
Vans	100,865	106,607	150,256	213,574	234,761	237,298
Total Passenger Vehicles	1,549,882	1,552,703	1,951,333	2,501,542	2,629,839	2,686,429
M&HCVs	274,582	183,495	244,944	323,059	349,216	268,263
LCVs	215,912	200,699	287,777	361,846	460,283	524,887
Total Commercial Vehicles	490,494	384,194	532,721	684,905	809,499	793,150
Three Wheelers	364,781	349,727	440,392	526,024	513,281	538,291
Scooters	1,050,109	1,148,007	1,462,534	2,057,604	2,558,981	2,923,401
Motorcycles	5,768,342	5,831,953	7,341,122	9,013,888	10,073,303	10,085,586
Mopeds	413,759	431,214	564,584	697,418	776,866	788,761
Electric Two Wheelers	17,068	26,445	2,711	-	-	-
Total Two Wheelers	7,249,278	7,437,619	9,370,951	11,768,910	13,409,150	13,797,748
Grand Total	9,654,435	9,724,243	12,295,397	15,481,381	17,361,769	17,815,618

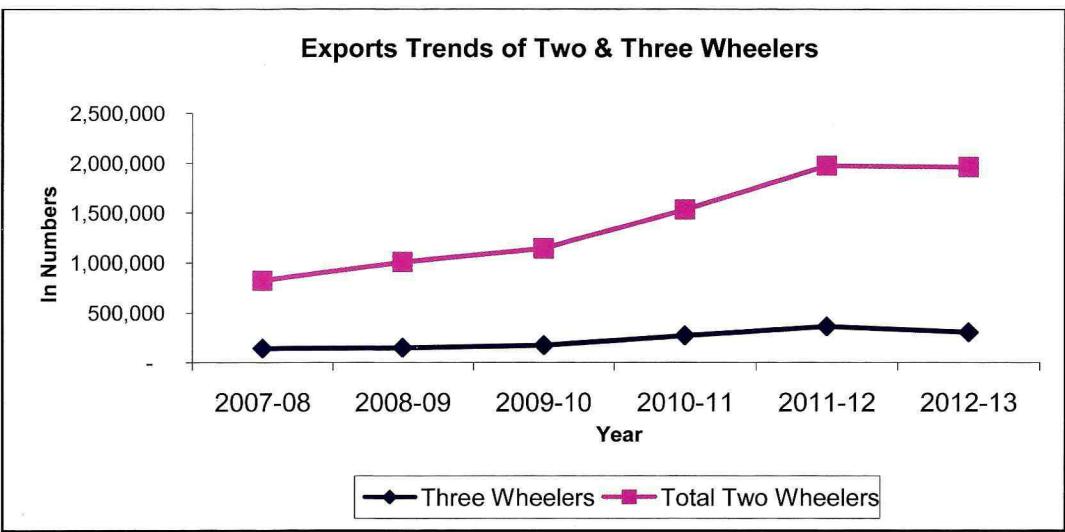
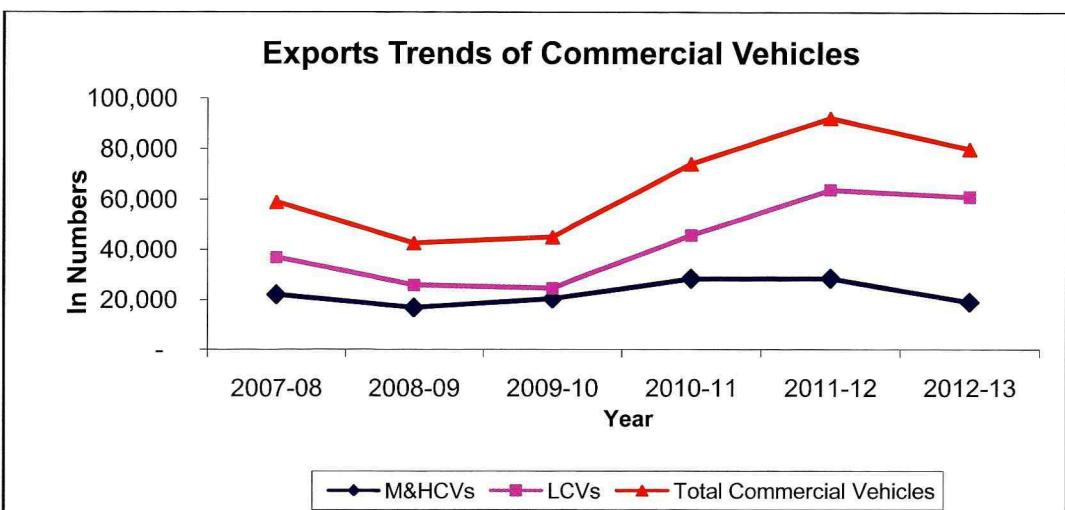
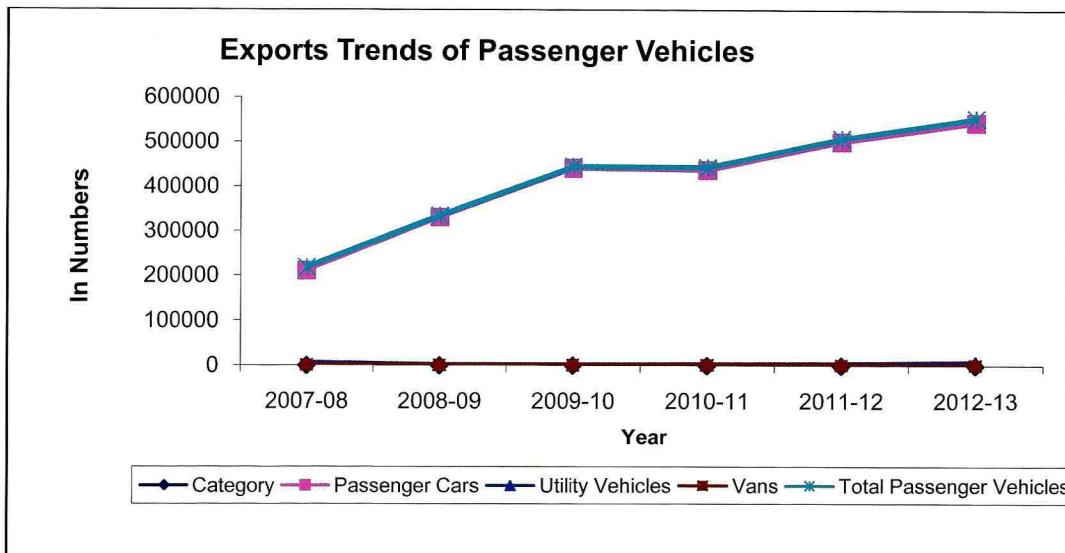
Automobile Exports Trends

Category	(Number of Vehicles)					
	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13
Passenger Cars	211,112	331,535	441,709	438,214	501,546	544,656
Utility Vehicles	6,283	3,034	2,823	3,746	5,221	8,261
Vans	1,006	1,160	1,613	2,366	2,016	1,769
Total Passenger Vehicles	218,401	335,729	446,145	444,326	508,783	554,686
M&HCVs	22,093	16,819	20,425	28,349	28,495	19,019
LCVs	36,901	25,806	24,584	45,694	63,763	60,925
Total Commercial Vehicles	58,994	42,625	45,009	74,043	92,258	79,944
Three Wheelers	141,225	148,066	173,214	269,968	361,753	303,088
Scooters	25,482	25,816	30,125	50,646	94,440	91,084
Motorcycles	776,007	971,018	1,102,978	1,474,678	1,871,595	1,866,549
Mopeds	18,224	7,300	6,905	6,295	9,076	3,308
Electric Two Wheelers	-	40	50	-	-	-
Total Two Wheelers	819,713	1,004,174	1,140,058	1,531,619	1,975,111	1,960,941
Grand Total	1,238,333	1,530,594	1,804,426	2,319,956	2,937,905	2,898,659

Domestic Sales Trends



Automobile Exports Trends



SIAM OFFICE BEARERS

SIAM Executive Committee 2012-2013

COMPANY	MEMBER	ALTERNATE MEMBER
Eicher Motors Ltd (Unit Royal Enfield)	Mr S Sandilya <i>President</i>	Dr Venkatesh Padmanabhan
Toyota Kirloskar Motor Pvt Ltd	Mr Vikram Kirloskar <i>Vice President</i>	Mr Hiroshi Nakagawa
General Motors India Pvt Ltd	Mr Lowell Paddock <i>Treasurer</i>	Mr P Balendran
Ashok Leyland Ltd	Mr Vinod K Dasari	Mr Rajive Saharia
Bajaj Auto Ltd	Mr Rajiv Bajaj	Mr R C Maheshwari
Cummins India Ltd	Mr Anant J Talaulicar	Mr Mahesh M Narang
Ford India Pvt Ltd	Mr Joginder Singh	Mr Vinoy Piparsania
Hero MotoCorp Ltd	Mr Pawan Munjal	
Hyundai Motor India Ltd	Mr Bo Shin Seo	Mr Arvind Kumar Saxena
Mahindra & Mahindra Ltd	Dr Pawan Goenka	Mr Rajan Vadhera
Mahindra & Mahindra Ltd	Mr P N Shah	Mr Sachin Arolkar
Maruti Suzuki India Ltd	Mr K Ayukawa	Mr I V Rao
Mercedes- Benz India	Mr Peter Honegg	Mr S M Kadlaskar
Piaggio Vehicles Pvt Ltd	Mr Ravi Chopra	
Tata Motors Ltd	Mr Ravi Kant	Mr Ravi Pisharody
Tata Motors Ltd	Mr Karl Slym	Mr A S Puri
TVS Motor Company Ltd	Mr K N Radhakrishnan	
Volkswagen India Pvt Ltd	Mr Mahesh Kodumudi	Mr Pankaj Gupta
VE Commercial India Pvt Ltd	Mr Siddhartha Lal	Mr Vinod Aggarwal

COUNCILS & GROUPS

SIAM Executive Committee 2012-2013

A. COUNCIL ON INTERNATIONAL BUSINESS



Chairman: Dr Pawan Goenka
President – Automotive & Farm Equipments
Mahindra & Mahindra



Chairman: Mr Ketan Doshi
Head-New Business Development
Mahindra & Mahindra



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



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



Co-Chairman: Mr Rahul Bharti
Head-Corporate Government Affairs,
Maruti Suzuki India



Chairman: Mr P N Shah
Chief Executive (International Operations)
Mahindra & Mahindra



Co-Chairman: Mr H S Goindi
President (Marketing)
TVS Motor

B. COUNCIL ON MARKET



Chairman: Mr Michael Boneham
Managing Director
Ford India

1. VEHICLE CLASSIFICATION, SALES REPORTING & ANALYSIS



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



Co-Chairman: Mr N K Rattan
COO, Tractor Business and President (Corporate
Sales & Marketing), Force Motors

2. TRADE FAIRS GROUP



Chairman: Mr Arvind Saxena
Managing Director,
Volkswagen Group Sales India



Co-Chairman: Mr Debashish Ray
Head - Corporate Communications
Tata Motors

3. LOGISTICS GROUP



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



Co-Chairman: Mr Prem Verma
Chief Executive Officer,
TML Distribution Company

4. CSR & COMMUNITY SERVICES



Chairman: Mr Mayank Parekh
Chief Operating Officer (Marketing & Sales)
Maruti Suzuki India

5. SERVICE HEADS GROUP



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



Co-Chairman: Mr Rajesh Mukhija
Deputy General Manager,
Hero MotoCorp

6. IT GROUP

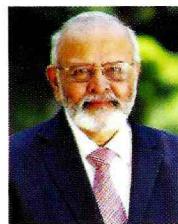


Chairman: Mr Vijay Sethi
Vice President (Information Systems) & CIO,
Hero MotoCorp



Co-Chairman: Mr Bishwanath Ghosh
Mahindra & Mahindra

C. COUNCIL ON ECONOMIC AFFAIRS



Chairman: Dr Abhay Firodia
Chairman
Force Motors



Chairman: Mr Sudam Maitra
Chief Operating Officer (Supply Chain)
Maruti Suzuki India

1. Sourcing Group



Co-Chairman: Mr B B Parekh
Chief (Strategic Sourcing)
Tata Motors

2. ECONOMIC RESEARCH GROUP



Chairman: Mr G V Rao
Sr. Vice President, Strategy Planning
VE Commercial Vehicles



Co-Chairman: Mr Ashotosh Goel
General Manager
Mahindra & Mahindra



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

3. TAXATION POLICY GROUP



Co-Chairman: Mr R Sethuraman
Senior Vice President (Finance)
Hyundai Motor India



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

4. TAXATION PROCEDURAL GROUP



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



Chairman: T Anantharaman
General Manager (Tax & Finance)
Mercedes Benz India

5. DIRECT TAX GROUP



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

6. FINANCE, LEASING & INSURANCE GROUP



Co-Chairman: Mr Lalit Malik
Chief Financial Officer
Eicher Motors

7 HUMAN CAPITAL GROUP



Chairman: Mr Prince Augustin
Executive Vice President
(Group Human Capital & Leadership Development)
Mahindra & Mahindra



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



Chairman: Mr Sanjoy Gupta
Vice President (Customer Care)
Mahindra & Mahindra

8. ANTI COUNTERFEITING GROUP



Co-Chairman: Mr Rajesh Bagga
Vice President - Legal
Tata Motors



Chairman: Mr Vinod Dasari
Managing Director
Ashok Leyland

D. TECHNICAL COUNCIL



Co-Chairman: Mr Marc Nassif
Managing Director
Renault India

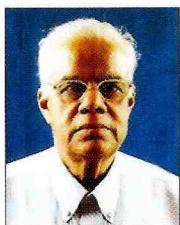


Chairman: Dr Rao Chalasani
Director (AVDC)
General Motors



Co-Chairman: Dr Tapan Sahoo
Vice President
Maruti Suzuki India

1. FRONTIER TECHNOLOGY GROUP, EV & HEV



Chairman: Capt. N S Mohan Ram
Adviser
TVS Motors

2. RECYCLING GROUP



Mr Sanjeev Mandpe
General Manager (Product Homologation)
Mercedes Benz India



Chairman: Mr Anant Talaulicar
Chairman & MD
Cummins India

3. DIESEL IMAGE GROUP



Chairman: Mr Kanwaldeep Singh
Vice President (Corporate Services),
Maruti Suzuki India

4. GASEOUS FUELS GROUP



Co-Chairman: Mr S Arun
Asst. General Manager,
Ashok Leyland



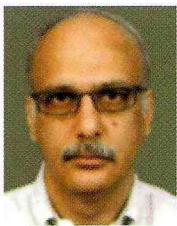
Chairman: Mr G K Binani
General Manager
Tata Motors

5. AUTO INFOTRONICS GROUP



Co-Chairman: Mr S Sakthivelan
Dy. General Manager
Toyota Kirloskar Motors

6. STYLING & DESIGN GROUP



Chairman: Mr Pankaj Jhunja
General Manager - Design
Tata Motors



Co-Chairman: Mr Tarun Aggarwal
General Manager
Maruti Suzuki India

E. NATIONAL & INTERNATIONAL REGULATION COUNCIL



Chairman: Mr Siddhartha Lal
Managing Director
Volvo Eicher Commercial Vehicles



Co-Chairman: Mr I V Rao
Executive Advisor (Engineering)
Maruti Suzuki India



Chairman: Mr J K Deb
Vice President (Engineering & Development)
Fiat India



Co-Chairman: Mr P Panda
Vice President
Maruti Suzuki India

1. EMISSIONS & CONSERVATION GROUP



Chairman: Mr S Ravishankar
Vice President (ERC)
Tata Motors



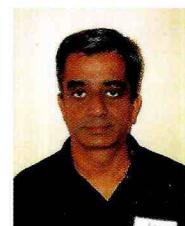
Co-Chairman: Mr R M Kanitkar
Force Motors

2. CMVR & SAFETY REGULATIONS GROUP

3. TWO WHEELERS GROUP



Chairman: Mr Harjeet Singh
Vice President
Hero MotoCorp



Co-Chairman: Mr R Narasimhan
General Manager
Bajaj Auto

4. THREE WHEELERS GROUP



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

5. INTERNATIONAL HARMONIZATION GROUP



Chairman: Mr C V Raman
Executive Director (Engineering)
Maruti Suzuki India



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

F. GOODS VEHICLES CEO'S COUNCIL



Chairman: Mr Vinod Agarwal
Chief Executive Officer
VE Commercial Vehicles

G. THREE WHEELERS CEO'S COUNCIL



Chairman: Mr Ravi Chopra
Chairman and Managing Director
Piaggio Vehicles

H. TWO WHEELERS CEO'S COUNCIL



Chairman: Mr K N Radhakrishnan
President & CEO
TVS Motor

I. PASSENGER CAR CEO'S COUNCIL



Chairman: Mr Lowell Paddock
President & Managing Director
General Motors India

J. MUVS CEO'S COUNCIL



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

K. BUS CEO'S COUNCIL



Chairman: Mr Ravi Pisharody
President (CVBU)
Tata Motors

SAFE - SOCIETY FOR AUTOMOTIVE FITNESS & ENVIRONMENT



President: Mr S V Suderson
General Manager - Product Engineering Services
Daimler India Commercial Vehicle



Vice President: Dr Venkat Srinivas
Special Director, Product Development
Ashok Leyland

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 Venkatesan	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 Bhatter	Hindustan Motors Ltd
1988/89 & 1989/90	Mr B De Souza *	Mahindra & Mahindra Ltd
1990/91 & 1991/92	Mr 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 Lal Munjal	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 - Current	Mr S Sandilya	Eicher Motors Ltd - Unit Royal Enfield

* Since deceased

Note: The names of companies are as they were known then

SIAM MEMBERS

1. Ashok Leyland Ltd
2. Asia Motor Works Ltd
3. Atul Auto 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. Force Motors Ltd
10. Ford India Pvt Ltd
11. Foton Motors Ltd *
12. General Motors India Pvt Ltd
13. Greaves Cotton Ltd
14. HD Motor Company India Pvt Ltd *
15. Hero MotoCorp Ltd
16. Hindustan Motors Ltd
17. Honda Motorcycle & Scooter India Ltd
18. Honda Cars India Ltd
19. Hyundai Motor India Ltd
20. India Yamaha Motor Pvt Ltd
21. International Cars & Motors Ltd
22. ISUZU Motors India Pvt Ltd *
23. JCBL Ltd
24. LML Ltd
25. Mahindra & Mahindra Ltd
26. Mahindra 2 Wheelers
27. Mahindra Trucks & Buses Ltd
28. Mahindra Reva Electric Vehicles Ltd
29. Maruti Suzuki India Ltd
30. Mercedes Benz India Pvt Ltd
31. Nissan Motor India Ltd
32. Piaggio Vehicles Pvt Ltd
33. Premier Ltd
34. Renault India Ltd
35. Royal Enfield (Unit of Eicher Motors Ltd)
36. Scooters India Ltd
37. Simpson & Co. Ltd
38. Skoda Auto India Pvt Ltd
39. SML Isuzu Ltd
40. Suzuki Motorcycle India Pvt Ltd
41. Tata Motors Ltd
42. Toyota Kirloskar Motor Pvt Ltd
43. TVS Motor Company Ltd
44. VE Commercial Vehicles Ltd
45. Volkswagen India Pvt Ltd
46. Volvo Buses India Pvt Ltd

**Associate Member*

In alphabetical order

SIAM SECRETARIAT



Mr Amit Kumar

Mr Arindom Ghatak

Mr Arnab Chakraborti

Mr Atanu Ganguli

Mr Biplab K Dutta

Mr Bhisham Prasad Rai

Mr Debasish Majumder

Mr Dhiraj V Chatap

Mr Dikshant Negi

Mr Dinesh Patnaik

Mr Hardik Makhija

Mr Jitendra Rai

Mr K K Gandhi

Mr Kartike Karwal

Ms Manju Dhamija

Mr Manoj Mohapatra

Ms Meenakshi Kukreja

Mr Philip Skaria

Mr R N Chakravarty

Ms Ragmani Shukla

Mr Raju Kamat

Mr Ramesh P Iyer

Ms Ritika Changia

Ms Ruby Ganguly

Mr Saurabh Rohilla

Mr Sugato Sen

Mr Sundeep Sundli

Ms Supriya Sinha

Mr Sushil Kumar

Mr Swarann Singh Virdi

Mr Tribhuvan Rai

Mr V K Pandey

Mr Vandit Vijay

Mr Vishnu Mathur

In alphabetical order

LINKAGE WITH OTHER INSTITUTIONS IN INDIA

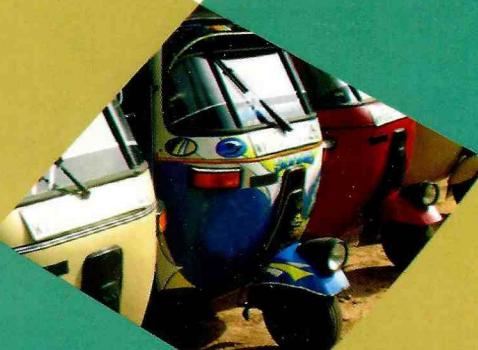
All India Motor Transport Congress
Alloy Steel Producers Association
Aluminum Association of India
Asian Development Bank
Association of Indian Forging Industry
Association of State Road Transport Undertakings
Automotive Component Manufacturers Association of India
Automotive Services Equipments Association
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 Organization of Motor Vehicle Manufacturers (OICA)
Japan Automobile Manufacturer Association (JAMA), Japan
Japan Automobile Standards Internationalisation Centre, Japan
Korean Automobile Manufacturers Association (KAMA), South Korea
Motor Vehicle Manufacturers Association, Italy
Motorcycle and Scooter Assemblers and Distributors Association of Malaysia
National Alternative Fuel Training Consortium, USA
National Association of Automobile Manufacturers of South Africa (NAAMSA)
National Association of Vehicle Manufacturers (ANFAVEA), Brazil
National Highway Traffic & Safety Authority, USA
Nepal Auto Dealers Association, Nepal
Philippine Automotive Federation, Philippines
SAE International, USA
Singapore Motorcycle Trade Association, Singapore
Taiwan Transportation Vehicle Manufacturers Association, Taiwan
Thailand Automotive Institution, Thailand
The Indonesia Automotive Federation (FOI)
The Indonesian Motorbike Assemblers' Association (PASMI), Indonesia
The Society of Motor Manufacturers and Traders (SMMT), UK
The Thai Automotive Industry Association (TAIA), Thailand
Transport Research Laboratory, UK
UK Trade & Investment (UKTI)
US Department of Commerce, USA
US Department of Energy, USA
US Environment Protection Agency, USA
Verband der Automobilindustrie e.v. (VDA), Germany
Vietnam Register, Vietnam

In alphabetical order



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