

Annual Report 2011 - 2012

SIAM

Society of Indian Automobile Manufacturers

ANNUAL REPORT 2011-12

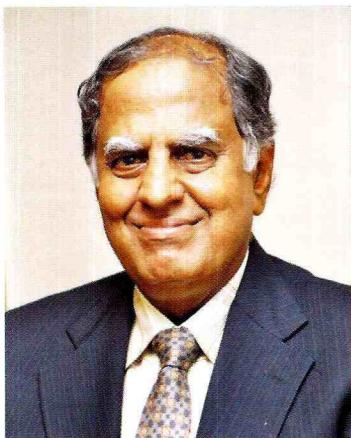
SIAM

Society of Indian Automobile Manufacturers

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PRESIDENT'S MESSAGE



Dear Friends,

The last twelve months have once again put to test the resilience of the Indian automotive industry. Having successfully emerged from the downturn in 2008, the industry once again got caught in the vortex of spiraling inflation, high interest rates and rapid hikes in petrol prices that took its toll on the overall sentiments in the market.

Passenger vehicles segment was the worst affected with the growth falling from 29.16% in 2010-11 to 4.66% in 2011-12. Commercial vehicle industry also saw fluctuating fortunes. However, the two wheeler segment continued on a path of steady although more moderate growth. Overall, the vehicle industry clocked a growth more or less in line with the growth forecasts made by SIAM for 2011-12.

The year saw multiple challenges facing the industry. The primary challenges were the high inflation which prompted RBI to tighten the monetary policy with interest rate hikes. This had a direct impact on vehicle sales. The volatile prices of crude oil resulted in 11 hikes in the prices of petrol during the year further depressing the consumer sentiment and shifting the demand somewhat towards diesel cars. There was a serious threat of increased taxation on diesel cars which would have been a retrograde step for the industry. However, due to the intervention of SIAM, such a step has not been taken. Government also completely removed the Excise Duty concessions given in 2008 as a part of the stimulus package thus pushing up the costs for the industry. Excise duty on cars and commercial vehicles was also increased in the Union Budget 2012 leading to further cost increase. The year also saw a resurgence of labour unrest in the north which led to reduced production and more recently the outbreak of unprecedented violence. All these developments have resulted in a low market sentiment and reduced sales of vehicles.

As we closed the first quarter of 2012-13, the passenger vehicles segment has somewhat improved to a 9.71% growth. However, the Heavy Goods Carriers sector has slipped into negative territory with the Q1 witnessing a drop of 17.88% thereby fearing a repeat of 2008.

Not with standing the subdued industry performance, there were some bright sparks during the year. The 11th Auto Expo 2012 witnessed 1500 exhibitors and the presence of 25 countries and saw 58 new vehicle launches that included cars, two wheelers, trucks & buses. Global premieres of cars with special focus on Green Technologies and Environment, Goodwill Day for Differently-abled visitors attracted about 700,000+ visitors to the Show.

Despite a slowdown in the EU market, with the efforts of the industry to tap new markets, the year saw positive growth in exports with an overall growth of 25.44 percent. SIAM played a key role in the restructuring of export incentives when the DEPB Scheme was replaced by the Duty Drawback Scheme due to which favourable Duty Drawback rates were evolved by the Government for exports of different types of vehicles. For the first time in history passenger vehicles exports crossed half a million in a financial year. Passenger vehicles exports grew by 14.18%, Commercial Vehicles by 25.15% and two wheelers by 27.13%. Three Wheeler exports grew by 34.41%.

During the year 2011-2012, SIAM continued to play a major role in the arena of regulatory frameworks on Safety, Emission, Recycling, International Trade, Taxation, Economic Research, Sourcing, Insurance and Logistics. SIAM's regular engagements at international fora like WP-29, APEC Automotive Dialogue, OICA and IMMA were further enhanced. For the first time, SIAM President was elected as the Global President of the Geneva based International Motorcycle Manufacturers Association (IMMA).

As a proactive Industry body sensitive to the needs of the larger society, SIAM released its voluntary policy for Vehicle Recall as well as developed a framework for a Policy on Recycling of Vehicles at their end-of-life.

The joint initiative of conducting a Market Study on Electric and Hybrid Vehicles with the Ministry of Heavy Industries was brought to a successful conclusion. The Ministry of Heavy Industries is now in the final stages of preparing the NEMMP document which will form the foundation of the Electric Mobility Policy of the country.

Our CSR arm, SAFE is involved in various activities of road safety, education and training programmes, clean and green environment awareness drives. During the year SAFE organized Road Safety Awareness drives during National Road Safety Week in January 2012 at 3500 dealers' premises and also organized more than 150 refresher road safety training workshops for school/college students and drivers across the country to spread the message of Road Safety. On 5th June 2012, SAFE with the members 'help and dealers' support organized Free Pollution Under Control (PUC) camps at 4200 locations alongwith various environment and safety activities.

Regulations on Fuel Efficiency, CO2 reduction and Fuel Efficiency Labeling were some of the challenges for the auto industry and SIAM continued to work actively with the concerned ministries to structure the necessary policy framework.

A new initiative of building relationship with Auto-City Gas Distribution Industry was undertaken

and a Round Table was organised to address several issues of Automotive and Gas Company. SIAM had an interaction with Petroleum and Natural Gas Regulatory Board (PNGRB) with an objective to initiate a dialogue with PNGRB.

SIAM alongwith Clean Air Initiative - Asia initiated the efforts to establish a 'Greening the Freight Road Transport in India' to cover clean technologies, freight logistics, financial mechanisms, and other policy and capacity building measures. SIAM partnered with UK Trade and Investment (UKTI) and Society of Motor Manufacturers and Traders, UK (SMMT) and created opportunity to share ideas and expertise on energy efficient technologies including the improvement of combustion engines, light weighting, electric motors & powertrain electronics and energy storage & management.

We shared our Regulatory and Certification regime with the National Highway Traffic Safety Administration, USA.

The Planning Commission of India had formulated various Working Groups as part of the Twelfth Five Year Plan (2012-17) consultation process. Several Sub-Groups had been constituted to work in specific areas and we worked with the Government in various Sub-Groups & looking at development of the industry in the next five year plan period.

We submitted our inputs for revision in the India's Foreign Trade Policy & Procedure to the Directorate General of Foreign Trade (DGFT). These suggestions were prepared by the SIAM Exports Group aimed at improving India's automobile exports. A number of our suggestions have been accepted in the policy announced in June 2012.

During the year, we had several rounds of discussions with the Government of India and other stakeholders about the trade agreements currently being negotiated, as well as expansion of scope of the existing trade agreements. Our inputs have always been appreciated by the Government.

We worked constantly to help the industry develop improved human resources, through our Human Capital Group activities. After a gap of two years, we again organized the Human Resources Conclave, which was well attended.

SIAM along with ACMA and FADA has joined hands with Government of India to promote ASDC, the Automotive Skills Development Council, for addressing the critical issue of skills gap facing our industry. In turn, ASDC has entered into an agreement with the National Skills Development Corporation (NSDC) to take up a Pilot Project as a proof of concept for ASDC mandate.

We are constantly engaged in matters concerning the input requirements for vehicles. SIAM is compiling and circulating a monthly price monitor for various raw materials giving the trend of price movement of important raw materials. The Secretariat has developed a vehicle price index to correlate the impact of increase in prices of input materials on the cost of cars. We are also continuously monitoring and updating the list of tyres that are to be imported by OEMs for after sales service to their customers through their own channel without BIS marking.

SIAM Logistics group was engaged in developing strategies for improvements in the logistics -both inbound as well as out bound for the industry covering Road, Rail as well as coastal shipping routes. Based on our inputs, RDSO Lucknow has approved two wagon designs that could be utilised by OEMs for outbound logistics.

SIAM had introduced New Classification in the Passenger Vehicles and Commercial Vehicles segments last year. This year we have introduced various changes in two wheeler classifications to capture the market segments better and have also introduced reporting of model wise data of two wheelers. In respect of commercial vehicles, we have also started giving the names of models covered under each sub-segment and segment. The flash reports, as per the new format, have been introduced from April 2012.

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 - CII, ACMA, ATMA, IMTMA, etc. for their close partnership. 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.

Despite facing odds the Indian Auto Industry has always emerged successfully from challenging times in the past. I am sure that the current period of slowdown will make the industry stronger and more resilient in facing the realities of the evolving market conditions. The message is clear - Industry will need to manage the short-term fluctuations in the market without losing focus on the long term growth potential of the industry.

SIAM would continue to support and guide the industry in this endeavor.

I wish you all the very best.



S Sandilya

6th September 2012



Mr S Sandilya, President, SIAM charing 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 works towards supporting sustainable development of the Indian Automobile Industry with the mission that India emerges as the destination of choice in the world for design and manufacture of automobiles. It works towards facilitating 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. It also organizes Seminars & Workshops on the topics of topical relevance and interest to the industry.

It works closely with the Government and with international bodies like UNECE, OICA, IMMA and coordinates with other counterpart international associations like VDA, JAMA, SMMT, TAIA AFM, ANFIA etc.

The Society organizes 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 safety, address air quality improvement, ensure compliance with standards and promote growth with responsibility.

Mission

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

In order to achieve the mission, SIAM focused on several areas during the last two years 2010-12:

- 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 51st ANNUAL CONVENTION 2011

Reinventing Mobility: Vision 2020

7th September 2011, Hotel Taj Palace, New Delhi



(L-R): Mr S Sandilya, (then) Vice President, SIAM & Chairman, Eicher Group, Dr Montek Singh Ahluwalia, Deputy Chairman, Planning Commission, Government of India, Mr Praful Patel, Hon'ble Minister of Heavy Industries & Public Enterprises, Dr Pawan Goenka, (then) President, SIAM and President – Automotive & Farm Equipments, Mahindra & Mahindra, Mr Vishnu Mathur, Director General, SIAM

SIAM Annual Convention 2011 marked celebration of its 51 years focusing on issues influencing the Indian automotive industry's competitiveness, growth and its integration with the global economy. It embarked on an exploration of how mobility would reinvent itself in the next decade and aimed at setting up a vision for 2020.

A confluence of global automotive industry leaders, speakers and policy makers in the government, addressed the core issues and also discussed the possible solutions in all spheres. The theme of this year's Annual Convention was *"Reinventing Mobility: Vision 2020"*

Around 1000 persons participated from all over the world including CEOs and senior representatives from the Indian and Global OEMs and the component manufacturers. SIAM Annual Convention 2011 saw global automotive industry leaders, speakers and policy makers from

government sharing the dais to address the dynamics of managing growth in all spheres.

The leaders presented their perspectives on the following themes:

- “Global Automobile Industry: The Indian Decade”
- “Alternative Powertrain & Challenges for Next Decade”
- “Mobility for 1.5 billion: Challenges of Inclusive Growth”
- “Changing India in a Changing World”

Dr Pawan Goenka, (then) President, SIAM and President – Automotive & Farm Equipment, Mahindra & Mahindra, welcomed all the dignitaries, guests and delegates present in the convention. The Inaugural session was attended by Mr Praful Patel, Honorable Minister of Heavy Industries & Public Enterprises, the Chief Guest; and the Deputy Chairman, Planning



Dr Pawan Goenka, (then) President, SIAM and President – Automotive & Farm Equipment, Mahindra & Mahindra, addressing the Inaugural session of SIAM Annual Convention 2011

Commission, Dr Montek Singh Ahluwalia as Guest of Honour. Dr Goenka spoke about new technologies and improving the fuel efficiency and capacity of manufacturing at a larger scale. He also shared his views on various challenges the industry is facing in terms of environmental protection with the measures that can be taken to improve the current scenarios. He said, last year, the industry upgraded to BS IV Norms in 13 cities and BS III in rest of the country. The industry would now start their preparation for next level of emission norms subject to the availability of the right fuel. Dr Goenka also thanked the Government of India for being an excellent partner in the growth process of the industry.

Chief Guest of the 51st annual convention, Honorable Union Minister of Heavy Industries & Public Enterprises, Mr Praful Patel spoke about improving the infrastructure keeping in mind the future needs of the country. He requested the industry leaders to tap the rural market of the country, as he believes it has great opportunities, focusing on improving the fuel efficiency.

On the occasion, Deputy Chairman, Planning Commission, Dr Montek Singh Ahluwalia addressed the serious issues related to infrastructure in the country. He emphasised to need to improve the public transport scenario in the country. He spoke about the country's GDP in the XII Plan (2012-2017). He indicated



Chief Guest Mr Praful Patel, Hon'ble Minister of Heavy Industries & Public Enterprises, Government of India, addressing the SIAM Annual Convention 2011

that to achieve a 9 per cent growth during the XII Plan period will be a very challenging task. He further said that though the global economic scenario looked depressing at the moment, the situation would improve over the coming months.

Mr S Sandilya, (then) Vice President, SIAM & Chairman, Eicher Motors thanked all the officials who shared their views.

The Inaugural session was followed by three keynote sessions. Mr Kumar Galhotra, Executive Director, Product Development, Asia Pacific and Africa, Ford Motor Company, China during the first session on "*Global Automobile Industry: The Indian Decade*" stated that 'the Indian automotive industry has transformed in the last few years to a more economically liberal and open industry rife with opportunity. As a



Guest of Honour Dr Montek Singh Ahluwalia, Hon'ble, Deputy Chairman, Planning Commission, Government of India, addressing the SIAM Annual Convention 2011

result, the industry has become one of the fastest growing in the world, with more opportunities for localization, exports and competition, while also attracting foreign investments'.

Mr Mike Wright, Executive Director, Jaguar Land Rover, UK said India has a potential market for the Automobile industry. He talked about global factors which are impacting the Indian market like consumer, manufacturers and socio political environment. He highlighted some key global automotive industry trends to shape strategy for the future like high and volatile fuel pricing; continuing CO2 legislation and taxation which will drive fuel efficiency and energy security concern.



Mr Kamal Nath, Hon'ble Minister of Urban Development,
Government of India

During the plenary session, Mr Kamal Nath, Honorable Minister of Urban Development, raised the issue of transportation and asked industry players to work with the government. He expressed, that if the government and the automobile industry come together, high quality access to mobility can be ensured.

The second plenary session on Alternative Powertrain & Challenges for Next Decade was addressed by Prof. Dr Willi Diez, Director, Institute for Automotive Research (Geislingen/Steige), Germany. He shared his thoughts on lowering the CO2 Emissions, efficiency improvement potential in case of internal



(L-R): Mr Anirudh Bhuwalka, Managing Director, Asia Motor Works, Mr Bill Russo, Senior Industry Advisor, China Automotive Practice, Booz & Co, China, Mr Karl Slym, President & Managing Director, General Motors India, Prof. Dr Willi Diez, Director, Institute for Automotive Research (Geislingen /Steige), Germany, Mr Sushil Kumar, Advisor, SIAM

combustion engines (ICE), electrification, Plug-in-Hybrid Electric Vehicles offering full vehicle performance and Fuel Cell Vehicle (FCV) based on hydrogen.

Mr Bill Russo, Senior Industry Advisor, China automotive practice, Booz & Co. mentioned that OEMs are currently researching different technologies and are getting active on electric mobility. This will give new dimensions to the automobile industry, as it will open new frontier on the major innovation grounds such as technical, business and regulatory innovation. The alternative powertrain revolution would be driven by five key drivers: alternative fuel trends, petroleum supply and demand, power train technology, and regulatory imperatives. There are several challenges which need to be mitigated to enable the hybrid / electric mobility solutions to take-off in earnest. The joint efforts from the industry and government will be required for establishment of charging infrastructure.

The third keynote session focused on "Mobility for 1.5 billion-Challenges of Inclusive Growth". Prof. Daniel Sperling, Professor of Civil Engineering & Science & Policy and Foundation Director, University of California emphasised on improving vehicle efficiency, production

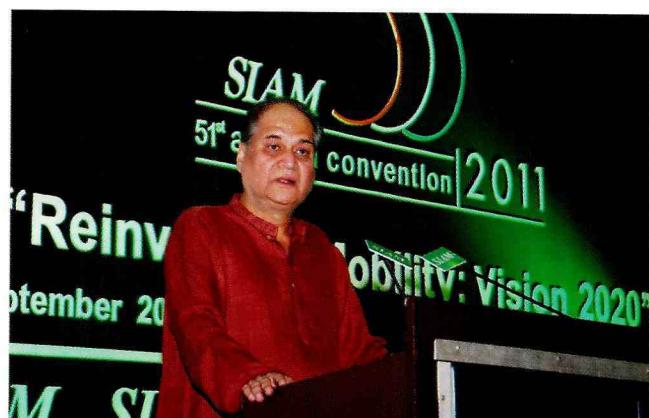


(L-R): Mr K N Radhakrishnan, President & CEO, TVS Motor Company, Dr Kirit S Parikh, Chairman, Expert Group for Low Carbon Strategy for Inclusive Growth, Planning Commission of India & Chairman, IRADE, India, Mr Akash Passey, Managing Director, Volvo Buses India, Prof. Daniel Sperling, Professor of Civil Engineering & Environmental Science & Policy, Founding Director, Institute of Transportation Studies, University of California (Author of 'Two Billion Cars: Driving Toward Sustainability'), USA, Mr Atanu Ganguli, Director, SIAM

of cleaner, more efficient & safer vehicle by accelerating emissions controls for successful future in the Automotive Industry. Professor Sperling addressed the vehicle technology revolution that is just taking off, including the shift to electric-drive propulsion.

Dr Kirit Parikh, Chairman, Expert group of low carbon strategy for inclusive growth, Planning Commission of India & Chairman IRADE emphasized the fact that while formulating policies we need to keep in mind their 'long term impact & emphasis should be given on allocating the resources efficiently and making maximum use.'

The industry keynote session on "Changing



Mr Rahul Bajaj, Chairman, Bajaj Auto Ltd addressing at the session on Changing India in a Changing World.

India in Changing World" was concluded by Mr Rahul Bajaj, Chairman, Bajaj Auto, India. He spoke on the theme "Changing India in a Changing World" and talked about the state of the world economy and the Indian situation with change as the only constant thing in the world. He highlighted that the global world has recently seen changes in terms of technological developments and unrest across the world like revolutions in the Arab world, rioting in UK, fasting against corruption in India, etc. He mentioned that in the last two decades, two trends have emerged:

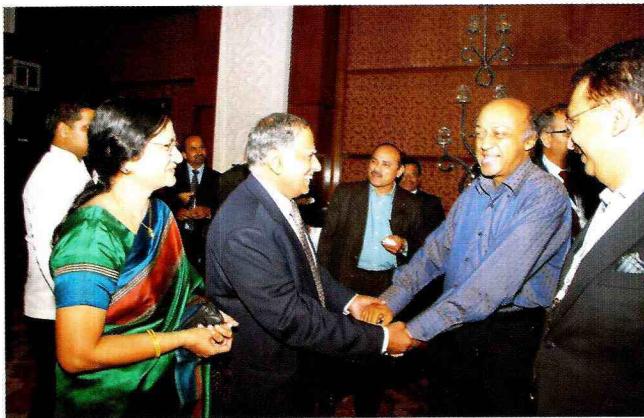
- Shifting of economic growth to developing world as is evident from the fact that between 1990-2010, US share in global markets declined from 25% to 20% and China's share increased from 4% to 13%
- Depletion of non-renewable resources



SIAM Office Bearers for the year 2011-2012 (L-R): Mr Michael Boneham, Treasurer, SIAM, Mr Vikram S Kirloskar, Vice President, SIAM, Mr S Sandilya, President, SIAM, Mr Vishnu Mathur, DG, SIAM,

SIAM Awards Function and Dinner on 7th September 2011

On the occasion of the 51st SIAM Annual Convention, award function and dinner was hosted by Mrs and Mr S Sandilya President SIAM in the evening of 7th Sept 2011 at Hotel Taj Palace, New Delhi.

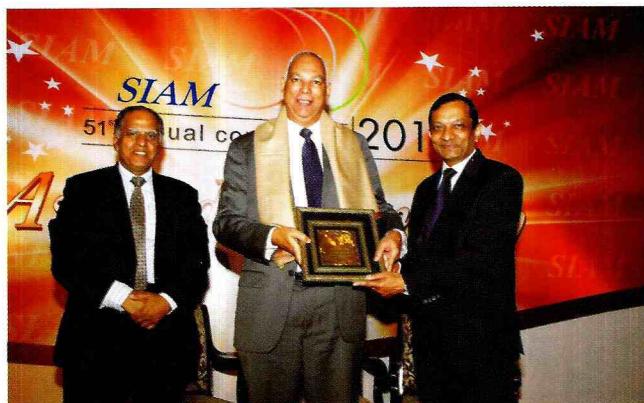


Mr & Mrs S Sandilya, President, SIAM welcoming guest at the Dinner function on 7th September 2011

After the awards Dr Abhay Firodia was requested to say a few words. While thanking SIAM for the award he mentioned that he had the unique privilege to work on a complete range of vehicles right from the smallest engined vehicle i.e. a moped up to large heavy duty trucks.



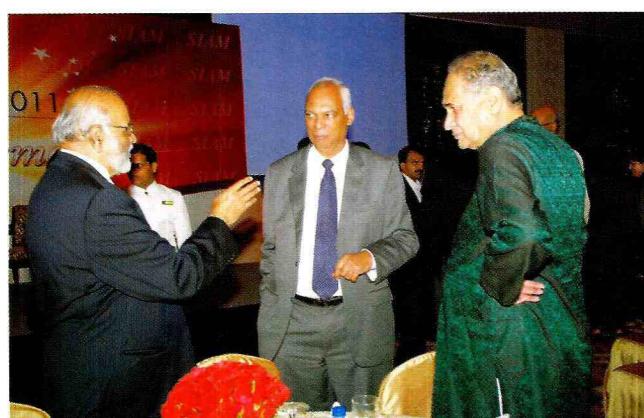
Dr Pawan Goenka, Immediate Past President, SIAM and Mr S Sandilya, President, SIAM facilitating Dr Abhay Firodia, Chairman, Force Motors Ltd, Jai Hind Industries & Man Force Trucks Pvt Ltd with SIAM Past President Life Time achievement Award.



Dr Pawan Goenka, Immediate Past President, SIAM and Mr S Sandilya, President, SIAM facilitating Mr Prakash M Telang, Managing Director, India Operations - Tata Motors Ltd with SIAM President's Award.



Dr Pawan Goenka, Immediate Past President, SIAM and Mr S Sandilya, President, SIAM handing over SIAM Mentor Award on behalf of Mr Z A Mujawar to Mr Mathew Abhram, Mahindra & Mahindra Ltd



(L-R): Dr Abhay Firodia, Chairman, Force Motors Ltd, Mr P M Telang, MD, Tata Motor and Mr Rahul Bajaj, Chairman, Bajaj Auto Ltd



(L-R): Mr S R Marathe, Director, ARAI, Dr R K Malhotra, Director, IOC and Mr Ambuj Sharma, Joint Secretary, MoH&PE



Dr Pawan Goenka, Immediate Past President, SIAM and Mr S Sandilya, President, SIAM facilitating Mr T M Balaraman, Hero Motocorp Ltd with SIAM Mentor Award



Dr Pawan Goenka, Immediate Past President, SIAM and Mr S Sandilya, President, SIAM facilitating Mr Anant J Talaunicar, Chairman and Managing Director, Cummins India Ltd.



Dr Pawan Goenka and Mr S Sandilya alongwith SIAM Secretariat during the Annual Convention 2011

Mr S Sandilya, President, SIAM gave the concluding remarks thanking the award winners for their contribution to the functioning of SIAM.

11th AUTO EXPO 2012

5-11 January 2012, Pragati Maidan, New Delhi



Mr S Sandilya, President, SIAM at podium during Inaugural session at 11th Auto Expo 2012, Pragati Maidan

SIAM along with Confederation of Indian Industry (CII) and Automotive Component Manufacturers Association (ACMA) organized the 11th Auto Expo in New Delhi from 7th - 11th January 2012. The theme for this year was 'Mobility for All' with special emphasis on technological innovations in the areas of safety, environment and fuel efficiency. It showcased the latest technological products, components and vehicles. About 23 countries participated in the show. The expo witnessed 1500 exhibitors with the announcement of 58 new launches including cars, two wheelers, trucks and buses. Global premieres of luxury cars, special focus on Green Technologies and Environment, Goodwill Day for Differently-abled Visitors etc., attracted about 700,000+ visitors.

Many parallel events were also organized by SIAM on the sidelines of Auto Expo 2012. All these events provided useful opportunities to the automotive professionals to share and learn and update themselves on the automotive technology as well as the support policies all over the world. The enthusiasm for eco-friendly

vehicles echoed in the conference on 'Hybrid/Electric Mobility - Drive the Change'.

The expo witnessed the distinguished and eminent speakers from the different Ministries of the Government of India. Some of them were Hon'ble Mr Praful Patel, Union Minister of Heavy Industries & Public Enterprises, Mr Kamal Nath, Union Minister of Urban Development; Dr C P Joshi, Union Minister of Road Transport & Highways. Among others were; Mr B Muthuraman, President, CII, and Vice Chairman, Tata Steel Ltd. and Chairman,



Mr C P Joshi, Hon'ble Minister, Ministry of Road Transport & Highway cutting the ribbon of the 11th Auto Expo 2012

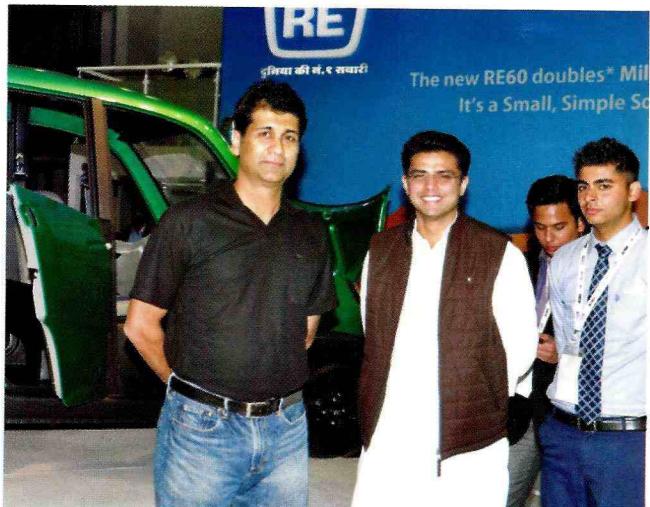


SIAM EC Meeting during Auto Expo 2012

Tata International Ltd; Mr Stewart Beck, High Commissioner of Canada to India; and Director General, CII; President, SIAM and President ACMA.

Speaking at the valedictory function, Hon'ble Minister Mr Kamal Nath, Union Minister of Urban Development congratulated CII, SIAM and ACMA on successfully organizing the exhibition. This sector has been an index of the economic health of the nation and after observing the success of the Auto Expo 2012, nobody can say that the Indian automobile industry has been seeing a down trend.

Mr S Sandilya, President, SIAM, stated that Auto Expo 2012 displayed new launches and has also facilitated direct dialogue between



(L-R): Mr Rajiv Bajaj, Managing Director, Bajaj Auto Ltd and Mr Sachin Pilot, Hon'ble Minister of State in the Ministry of Communications and Information Technology during Auto Expo 2012

producers and customers. The expo showcased Indian auto industry's growing strengths in safety, R&D, technology, design, IPR and manufacturing competitiveness. He further expressed that the dream of providing mobility to all has been largely fulfilled. The priority is to make this mobility greener. It is time to give another dream to the people of India which is green mobility for all. The global concerns of environment greenhouse gas emissions and carbon footprints - are the key challenges. We need to be future ready as a country and as an industry.

Auto Expo 2012 witnessed:

- Country Pavilions: Canada, China, France, Germany, Italy, Japan, Spain, Taiwan, & UK
- International Participation: 25 countries – Belarus, Canada, China, Czech Republic, France, Germany, Hong Kong, India, Italy, Japan, Malaysia, Portugal, Russia, Spain, Sweden, Switzerland, Singapore, South Korea, Taiwan, The Netherlands, Thailand, Turkey, UAE, UK & USA
- Overseas Delegations: 36 delegations from 25 countries.
- Focused Pavilions: Accessories Pavilion, Alternate Fuel Technologies, Asli Naqli Pavilion, Design Pavilion, Garage Equipment, Students Corner



(L-R): Mr S Sundareshan, Secretary, Ministry of Heavy Industries and Public Enterprises, Mr Vikram Kriloskar, Vice President, SIAM and Mr S Sandilya, President, SIAM flagging off Hybrid Vehicle during the Auto Expo 2012



- Several Concurrent Show: Auto Enterprise 2012 - The Big Fair for the Small Enterprises
 - 210 exhibitors; 8000 sqmts of area in an Exclusive Pavilion
 - Overwhelming response
- Concurrent Events: Introduction of Goodwill Day - a special facilitation of visit by differently abled people.
- "Asli Naqli" - Theme Pavilion, organized by ACMA, creating awareness about Original and Duplicate products.
- "Auto Expo - Design the Bookmark Contest" - event for school children
- Introduction of Traffic Marshals inside Pragati Maidan and at main entry points for Traffic Management in association with JK Tyre
- Road Safety Rallies by School Children
- No-Honking Campaign in association with Save Earth NGO
- Free Health Check Up Campaign for Drivers organized by SIAM-SAFE in association with Delhi Traffic Police, and TCI Foundation
- Nukad Natak on HIV Aids awareness for Drivers, Road Safety Nukad Natak
- Safety Ride Zone for Children By Hyundai Motor (I) Limited

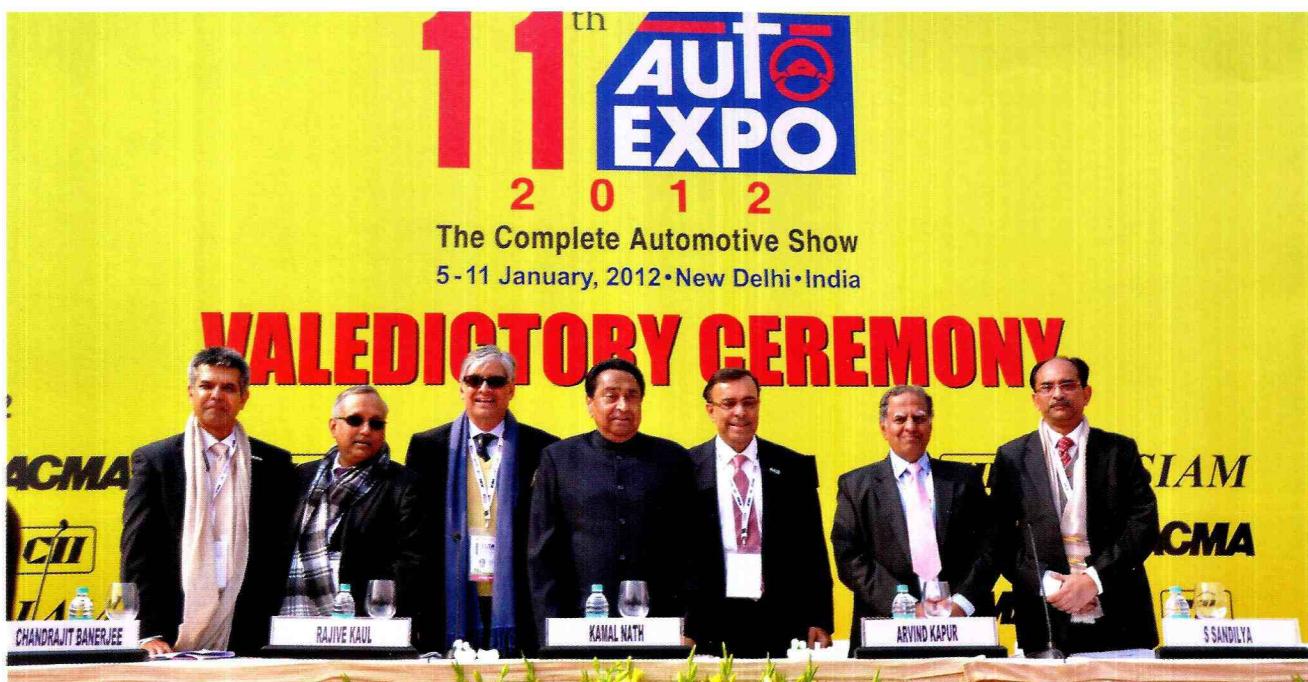
- Automotive Styling & Design Contest for Engineering Students
- Three Wheelers Training Programme organized by SIAM
- National Road Safety Week - Valedictory function in association with Ministry of Road Transport & Highways & SIAM.
- Special Award Ceremony on the occasion of 10th edition and 25 years of Auto Expo for continuous participation in all 10 events and largest participation in categories of Vehicles, Component, SME Sector and Overseas Pavilion
- IP Round table discussion by SIAM
- ACMA Golf Day
- Celebrity Visits
- Conferences & Seminars: Several conferences and seminars were organized during the Auto Expo.
- Seminar on "Recycling of Vehicles" by SIAM
- Technology Day on Hybrid/Electric Mobility by SIAM
- 6th Styling & Design Conclave, organized by SIAM
- Investment Promotion Seminar - the Road Ahead by ACMA





- Seminar on Low Carbon Vehicle Technology organized by SIAM in association with Society of Motor Manufacturers & Traders, UK (SMMT)
- Conference on Transport-Transport Solutions for a World-Class City organized by CII

- Auto Trade Dialogue 2012, organized by SIAM
- SMMT/SIAM Workshop on New Energy Efficient Technologies by SMMT
- Interactive Session with State Transport Commissioners by SIAM
- CAI Asia - Green Freight seminar by SIAM
- IPO conference by ACMA
- International Conference on Automotive Infotronics, organized by SIAM
- Interaction with Young Presidents' Organization delegation by ACMA
- India & Germany Seminar - Automotive Industry 2012, VDA and Roland Berger in Association with ACMA



Mr Kamal Nath, Hon'ble Minister of Urban Development during the valedictory session of 11th Auto Expo 2012

ECONOMIC AND COMMERCIAL AFFAIRS

SIAM Suggestions for Union Budget 2011-2012



Members during SIAM Taxation policy & Procedural Group meeting

Meeting of SIAM Taxation Policy & Procedural Groups on Pre-Budget Suggestions: October 2011, New Delhi

SIAM Taxation Policy & Procedural Groups met in October 2011 to discuss the Pre-Budget suggestions for the preparation of Policy & Procedural Memorandums. SIAM had earlier sought inputs from members on their suggestions for inclusion in this year's Pre-Budget Memorandum. Inputs received from the members were discussed in the meeting. It was also decided that a meeting would be organized with the Ministry of Finance officials to discuss the Pre-Budget Procedural issues in November 2011.

Ministry of Finance had invited SIAM to present its Pre-Budget suggestions, which was made by a team of CEOs led by President, SIAM. The meeting was chaired by Mr R S Gujral, Revenue



Members during Taxation Policy & Procedural Group meeting



Workshop on Taxation Procedural Issues, Goa

& Finance Secretary, Ministry of Finance.

A Workshop on Taxation Procedural Issues was organized by SIAM in December 2011, aimed at providing a platform for brain storming on various procedural issues being faced by members. The topics covered and presentations in the Workshop were on Direct Tax Issues, VAT Issues, Service Tax Issues and Excise & Customs Duty Issues.

The Taxation Procedural Group also met under the chairmanship of Mr D D Goyal, Chief General Manager (Finance), Maruti Suzuki India and Co-chairmanship of Mr Mohan Raghavan, Vice President (Excise), Mahindra & Mahindra to decide upon the SIAM recommendations on the Taxation Procedural aspects

SIAM met Mr Vivek Johri, Joint Secretary, Ministry of Finance in November 2011 to discuss the Pre-Budget Taxation Procedural Issues. SIAM presented the following issues:

- Utilisation of Cenvat for NCCD Payment - Specifically incorporate in the CCR, 2004 (in Rule 3(4) of CCR, 2004) or Board can issue a clarification in this regard. This will bring an end to the litigation.
- Export procedure for Nepal & Bhutan should be made at par with other countries

- Deposit of Service Tax Amount with Government - The Government may allow payment of total service tax amount through one GAR7 Challan irrespective of number of services involved. The same is allowed under Central Excise.
- Inputs used for free warranty - Not able to utilize because most auto manufacturers now operate free warranty by way of credit notes to dealers instead of physical replacement.
- Assessment under Rule 8 of the Central Excise Valuation Rules, 2000 - Assessee may be allowed to evaluate cost based on the earlier years' cost data.
- The ER-5 and ER-6 returns should not be applicable to units registered under Central Excise by virtue of Section 2(f) (iii) of the Central Excise Act due to their trading nature.
- Definition of Input Service - Rules should be reframed to allow Credit of all services procured by assessee for which service charges are paid/payable by the assessee except those services for which assessee recovers amount from any other person in such a way that it is not part of assessable value of any taxable goods/services supplied.

The Finance Ministry officials had asked for some additional information to reinforce our arguments, which was submitted.



Members during meeting of SIAM Taxation Policy & Procedural Groups on Union Budget 2012-13

Union Budget 2012-13

The Union Budget 2012-13 was presented by Hon'ble Finance Minister, Mr Pranab Mukherjee on 16th March 2012 in New Delhi. The key announcements relating to the automobile sector were as follows:

- 5 years Extension of 200% weighted deduction under IT Act for R&D.
- 150% weighted deduction for expenditure incurred in skill development.
- Increase in NHDP outlay.
- Service Tax increased from 10 to 12%.
- Excise Duty Increased from 10 to 12%.
- Excise duty on Small Cars now 12%.
- Excise duty on Cars & UVs up to 1500 cc now 24%.
- Excise duty on Cars & UVs above 1500 cc now 27%.
- Chassis of CV to attract 3% excise duty against Rs 10,000 earlier.
- Excise duty on battery packs supplied to manufacturers of EVs for use as spares & OEMs subject to end user condition reduced from 10% to 6%.
- Excise duty on specific parts of hybrid vehicles supplied to manufacturers of hybrid vehicles subject to end user condition reduced from 10% to 6%.
- Additional Parts added in list of hybrid vehicle parts which will also attract excise duty of 6%.
- Full exemption from Basic Customs Duty and SAD along with 6% CVD is extended to lithium ion batteries and other parts of hybrid vehicles.
- Customs Duty on Cars & UVs valued above USD 40,000 and engine capacity exceeding 3000 cc for petrol and 2500 cc for diesel increased to 75% from 60%.
- Customs Duty on Flat Steel increased to 7.5%.



(L-R): Mr Sugato Sen, Senior Director, SIAM, Mr Shekhar Vishwanathan, Deputy Managing Director - Commercial, Toyota Kirloskar Motor, Mrs Promila Bhardwaj, Director General of Income tax, International Taxation

Meeting with Director General, Department of International Tax.

SIAM organized its first interactive seminar with the Director General, Department of International Tax and her team of Directors who joined from all over India.

The seminar was graced by presence of over 30 officials. The aim was to understand the developments in the industry and their concerns with regards to international taxation and transfer pricing issues.

Meeting with the Ministry of Finance on Post Budget Taxation Issues

SIAM Taxation Policy and Procedural Groups met in March 2012 to discuss the Post-Budget suggestions for the preparation of Post-Budget Policy & Procedural Memorandums. SIAM had earlier sought inputs from members on their suggestions for inclusion in this year's Post-Budget Memorandum on both Policy & Procedural issues. These were discussed in the meeting and members identified the issues for inclusion in this year's Post-Budget Memorandums on Policy and Procedural Issues.

SIAM members met with Government officials to discuss Tax on Diesel Cars matter in June 2012. CEOs of SIAM member companies led by Dr Pawan Goenka, Immediate Past President

of SIAM met Ministry of Finance officials and explained why such tax should not be imposed. Additional inputs required by the Ministry have since been provided.

SIAM members also met Mr Vivek Johri, Joint Secretary, Ministry of Finance in June 2012 to discuss the issues arising out of the amendments made in the Union Budget 2012-13. The SIAM team discussed the following issues with Mr Johri:

1. Rate of Excise Duty on Chassis for goods applications should be revised;
2. Excise duty on capital goods cleared as waste and scrap should be on transaction value;
3. Assessment under Rule 8 of the Central Excise Valuation Rules, 2000 should allow assessee to evaluate cost based on the earlier year's cost data;
4. Explicit clarification on Rule 2(k) indicating the exclusion is applicable to motor vehicles and not to chassis for motor vehicles would help in avoiding issues at a later date;
5. Removal of ER-5 and ER-6 returns on units which pay excise duty by virtue of Section 2(f)(iii) of the Central Excise Act, 1944.

Mr Johri acknowledged the concerns raised by the team and assured that he would take the matter forward with the other authorities involved in the decision making body.

SIAM members met Mr V K Garg, Joint Secretary, Ministry of Finance, also in June 2012 in New Delhi to discuss the issues faced by the automobile industry due to the amendments made in the service tax rules. SIAM team discussed all service tax issues with Mr Garg including: 1) Rule 7 amendment which affects the input service distribution mechanism; 2) Requirement of separate GAR7 challan for each service on making service tax payment through E-payment facility, thereby making

the process time consuming and cumbersome; 3) Definition of input service should be reframed - Negative list concept has increased the difficulty in proving input service has been used in or in relation to manufacture products/ their clearance.

Mr Garg acknowledged the concerns raised by the team and assured that he would take the matter forward. He has also called for a second meeting with the team to address the concerns conclusively.

Foreign Trade Policy

Meeting of SIAM Exports Group with DGFT on SIAM Pre-Foreign Trade Policy Suggestions, March 2012; New Delhi

SIAM was invited by Mr A K Singh, Joint Director, Directorate General of Foreign Trade (DGFT), to discuss issues relating to India's Foreign Trade Policy especially relating to EPCG scheme in March 2012 in New Delhi. A pre-meeting was also held in SIAM office. SIAM team in this meeting raised several issues relating to the EPCG Scheme.

SIAM also met Mr Hardeep Singh, Joint Director, DGFT regarding the issues relating to incentives under India's Foreign Trade Policy. SIAM highlighted the key recommendations submitted by the society and urged the officials to consider these suggestions.

SIAM Suggestions on Increasing Exports

SIAM submitted its inputs for revision in the India's Foreign Trade Policy & Procedure. The recommendations were submitted to the Directorate General of Foreign Trade (DGFT). These suggestions were aimed at improving India's automobile exports were prepared by the SIAM Exports Group.

Foreign Trade Policy announced and post policy Suggestions

A number of suggestions have been accepted in the policy announced in June 2012.

1. Zero Duty EPCG Scheme has been extended upto March 2013.
2. It has also been made more flexible.
3. 7 new markets have been added to the FMScheme.
4. 7 New markets have been added to the Special FMS.
5. 29 new items added to the MLFPS
6. 7 new items added to FPS.
7. Export Obligation on export of 5 green technology products (Electrically operated vehicles) under EPCG Scheme has been reduced to 75%.

The remaining issues have been taken up again with the DGFT with the support of the Department of Heavy Industry.

Meeting of SIAM Exports Group

After the Indo-Nepal Treaty, Central Board of Excise & Customs had issued notifications regarding withdrawal of Duty Refund Procedure in Nepal (DRP). Accordingly, dispatches to Nepal will be treated at par with exports effective from 1st March 2012. However, there are some concerns where SIAM had sought clarity:

- While Central Excise has changed Nepal export procedure due to the change in the treaty between India and Nepal (as stated above), however, there is no clarity on the currency for payment transaction.



Members during a meeting of SIAM Exports Group



Members during a meeting of SIAM Exports Group

- Also, some obstacles remain in the form of absence of corresponding changes in Foreign Trade Policy, RBI regulations, FEMA etc. which may disqualify exports to Nepal from export benefits including duty drawback if the export is not in convertible currency.
- Further, as per our understanding, the Customs Notification No. 208/77 dated 01/10/1977 bans Drawback of duty on goods exported to Nepal.

SIAM organized meetings with Mr Rajiv Talwar, Joint Secretary (Drawback) and Mr S K Reddy, Director (International Customs Division), Ministry of Finance on the issue of Nepal Exports in February 2012 in New Delhi. A preparatory meeting was also held in SIAM office.

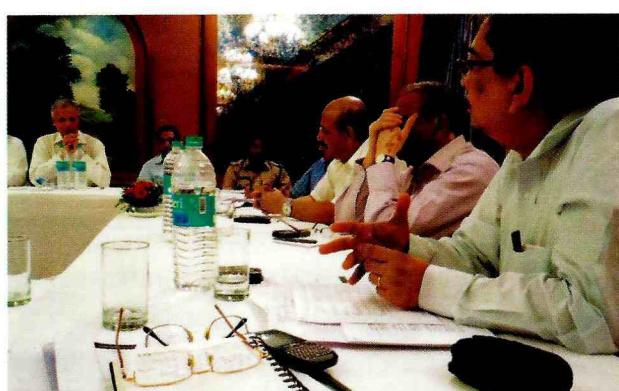
Mr Rajiv Talwar clarified to the SIAM team that the matter is being looked at in its entirety. They are also consulting DGFT for the necessary changes in the Foreign Trade Policy to ensure that Nepal exports can be normalized. However, policy decisions may take some time. He mentioned that as per Section 76, drawback of import duty would not be allowed. Hence, differentiation in case of Nepal and Bhutan was in the context of smuggling. At present, All Industry Rate (AIR) of drawback is not available for exports to Nepal. They would be streamlining the same soon. However, brand rate can be applied for as per the drawback Rule 6.

Duty Drawback aspects

The Government of India replaced the DEPB scheme with effect from 1st October 2011 with All Industry Rates under Duty Drawback Scheme. The new Duty Drawback schedule was announced on 26th September 2011. The new schedule includes automotive export items, which were under the DEPB scheme and also motor cars. Based on SIAM inputs, the new Drawback rates were increased from 1% to 5.5 %.

SIAM team met with Mr Najib Shah, Joint Secretary, Drawback Committee on 3rd October 2011 in New Delhi. SIAM discussed its concerns with respect to the new drawback schedule announced by the Government which has replaced the DEPB scheme. Issues discussed included Duty Drawback Schedule's classification, drawback rate for buses, two wheeler parts, cars including CKD/SKD exports, above 16T CVs, chassis of CVs, treatment of body builders, clarification about inclusion of Utility vehicles under HS 8703, etc. Mr Shah added that SIAM members could immediately write to them on these issues.

A High Level Draw Back Committee of the Government of India, set up to review the Draw Back Rates announced in 2011 consisting of Mr Saumitra Chaudhuri, Member Planning Commission, Mr T R Rustagi, Ex Joint Secretary, Tax Research Unit and Joint Secretary, Drawback, Ministry of Finance invited SIAM members for a meeting in May 2012. SIAM members presented to the committee, the difficulties



With the Draw Back Committee

being faced by them in export front and the duty incidence in their exports. The committee agreed to consider the same and made some suggestions regarding revising classification of various export categories for vehicles. They requested all the members to submit the data pertaining to import duties and other duties not covered under CENVAT within 2 weeks for consideration by the Committee. These have been submitted.

Participation in the Twelfth Five Year Plan (2012-17) Consultation Process

The Planning Commission of India had formulated various Working Groups as part of the Twelfth Five Year Plan (2012-17) consultation process. Various Sub-Groups had been constituted to work in specific areas and SIAM worked with the Government in several Sub-Groups to look at development of the industry in the next five year plan period.

The final meetings of most of the Working Groups on Automobile Sector were held in September 2011 in New Delhi. SIAM submitted documents highlighting AMP status and prioritizing interventions as per discussions in the earlier meetings.

SIAM participation in Associations' Council Meeting: September 2011, New Delhi.

SIAM participated in the Second Associations' Council Meeting in September 2011, held in New Delhi. ASCON Survey findings on the latest growth trends, issues of concern and business outlook across different sectors of the industry for the period April-September 2011-12 (Estimated) over April-September 2010-11 were presented in the meeting.

Economic Research

A meeting of SIAM Economic Research Group (ERG) was held in December 2011 in Bangalore under the chairmanship of Mr G V Rao, Co-Chairman, ERG. Presentations were made by the ERG Working Groups on :



Members during SIAM Economic Research Group meeting

- a) Rural Economy
- b) Demography
- c) Infrastructure
- d) Alternative Fuel.

The Group has decided to continue to work in these identified areas in future.

Looking Ahead Conclave

SIAM organized its 6th Looking Ahead Conclave on the sidelines of Auto Expo 2012 in January in New Delhi where experts deliberated on the future of the automobile industry in India.

The day started with remarks from Dr Abhay Firodia, Chairman, SIAM Council on Economic Affairs and witnessed interesting deliberations by industry experts from both commercial vehicles and personal vehicle segment.

CRISIL presented its estimates for future sales which were discussed by two panels on commercial and personal vehicles. High profile



(L-R): Mr Ravi Pisharody, President – CVBU, Tata Motors & Mr Rajive Saharia, Executive Director - Marketing, Ashok Leyland at the 'Looking Ahead Conclave'



Panel on Personal Vehicles (L-R): Mr Arvind Saxena, Director, Hyundai Motor India, Mr Mayank Pareek, Chief Operating Officer, Maruti Suzuki India, Mr Mohit Arora, Executive Director, J.D. Power Asia Pacific, Mr Jhaneshwar Sen, Senior Vice President (Sales & Marketing), Honda Siel Cars India, Mr R Ramakrishnan, Vice President – Commercial (PCBU), Tata Motors, Mr Anil Dua, Sr Vice President - Sales & Marketing, Hero MotoCorp, Mr N K Rattan, Operating Head-Sales & Marketing, Honda Motorcycle & Scooter India & Mr HS Goindi, President – Marketing, TVS Motor Co

panels included – Mr Rajive Saharia, Executive Director - Marketing, Ashok Leyland, Mr Ravi Pisharody, President – CVBU, Tata Motors, Mr Somnath Bhattacharjee, Executive Vice President, Sales & Marketing, V E Commercial Vehicles and Mr A Ramasubramanian, President, Asia Motor Works, Mr Arvind Saxena, Director-Sales & Marketing, Hyundai Motor India, Mr Mayank Pareek, Chief Operating Officer, Maruti Suzuki India, Mr R Ramakrishnan, Vice President – Commercial (PCBU), Tata Motors, Mr Jhaneshwar Sen, Senior Vice President (Sales & Marketing), Honda Siel Cars India, Mr Anil Dua, Sr Vice President - Sales & Marketing, Hero MotoCorp, Mr H S Goindi, President – Marketing, TVS Motor Co and Mr N K Rattan, Operating Head – Sales & Marketing, Honda Motorcycle & Scooters India.

The day also witnessed interesting presentations by experts on:

- International Macro Economic Trends
- Demographic Dividend of India
- Trends in Rural Economy

Experts who shared their views were: Dr Biswajit Dhar, Director General, Research & Information System for Developing Countries

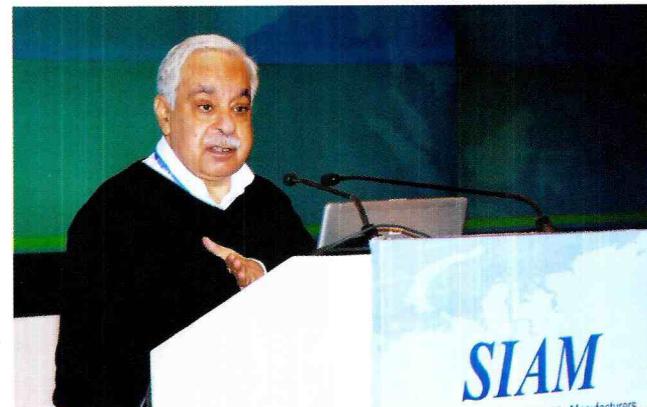
(RIS), Mr Nandan Chakraborty, Managing Director, Institutional Equity Research, Enam Securities, Mr Siddhartha Sanyal, Chief India Economist, Barclays Bank, Mr Thomas Puliyel, President, IMRB International, Dr Laveesh Bhandari, Chief Economist, Indicus Analytics, Mr Mahesh Vyas, Managing Director & CEO, Centre for Monitoring Indian Economy, Mr Anirban Ghosh, Vice President, Strategic Planning, Farm Equipment Sector, Mahindra Tractors and Mr J M Engineer, Consultant - Economic Services, Tata Services



SIAM 6th Looking Ahead Conclave, New Delhi



(L-R): Mr S Sandilya, President, SIAM and Mr Vishnu Mathur, DG, SIAM during a Press interaction



Dr Rahul Khullar, Commerce Secretary, Govt of India during the SIAM Auto Trade Dialogue

SIAM Projections for FY-13

SIAM organised a Press interaction in April 2012 in New Delhi, with Mr S Sandilya, President, SIAM for data release (April-March 2012). President, SIAM made the presentation to the media on 4th quarter (Fy-12) performance of the auto industry and also shared the future outlook of Auto industry for Fy-13 which is given below. However, based on actual performance in 1st Quarter, the projection was revised in July 2012:

Segment	F13 Growth (Apr 12 Est.)	F13 Growth (July 12 Est.)
Passenger Vehicles	10 – 12%	11 – 13%
Commercial Vehicles	9 – 11%	6 – 8%
Two Wheelers	11 - 13%	11 - 13%
Three Wheelers	5 - 7%	0 - 2%
Auto Total	10 - 12%	11 - 13%

INTERNATIONAL ENGAGEMENTS

SIAM Auto Trade Dialogue, in January 2012; New Delhi

SIAM organized its 5th Auto Trade Dialogue on the sidelines of Auto Expo 2012 in January 2012.

A special plenary session was organized with Dr Rahul Khullar, Commerce Secretary, Govt of India during the programme. He spoke about how auto industry could improve its export performance and contribute further by increasing its product portfolio.

In the opening session, Chief Guest, Dr Surajit Mitra, Secretary to Govt of India, talked about the need for the industry to build brand, invest in manufacturing and do R&D for technology development.

Leaders from nine international associations presented the status of their vehicle markets



Ms Datuk Aishah Ahmad, Chairperson, Automotive Federation of Malaysia (AFM), Malaysia at podium



Mr Eugenio Razelli, President, ANFIA, Italy & Vice President, OICA at podium during SIAM 5th Auto Trade Dialogue

and auto policies. Experts included:

- Datuk Aishah Ahmad, Chairperson, Automotive Federation of Malaysia (AFM), Malaysia
- Mr Yoshihiro Yano, Director General (International Department), JAMA, Japan
- Mr Klaus Braunig, Managing Director, VDA, Germany
- Mr David Croxson, Head of International, The Society of Motor Manufacturers and Traders (SMMT), UK
- Mr Sumanta Chaudhuri, Joint Secretary, Department of Commerce, Govt. of India
- Mr Tilak Gunasekera, Chairman (CEO & Executive Director, Sathosa Motors), Ceylon Motor Traders' Association (CMTA), Sri Lanka
- Mr Geert Bogaert, Attorney at Law - Partner, Commercial Department (IP-Distribution-Litigation) & Head-Automotive Practice Group, Loyens & Loeff, Brussels
- Mr A S Puri, Chairman, SIAM International Relations Group & Vice President (Govt Affairs & Collaborations), Tata Motors
- Mr J K Dadoo, Joint Secretary, Department of Commerce, Govt. of India

- Mr Eugenio Razelli, President, ANFIA, Italy & Vice President, OICA
- Mr John Conomos AO, Australian Automotive Industry Envoy, Department of Innovation, Industry, Science and Research, Australia
- Mr Steve Rodgers, President, Automotive Parts Manufacturers' Association, Canada

Bilateral Trade Policy Related Developments

During the year, SIAM had several rounds of discussions with the Government of India and other stakeholders about the trade agreements currently being negotiated, as well as expansion of scope of existing trade agreements.

SIAM was invited for a meeting on India-Australia CECA negotiations in November 2011, held under the chairmanship of Mr J K Dadoo, Joint Secretary, Department of Commerce. SIAM conveyed its position to the Ministry. Mr Dadoo requested the Department of Heavy Industry to constitute a Working Group on Auto Sector involving SIAM and ACMA.

SIAM was requested by the Ministry of Commerce to participate in the negotiations on the Non-Tariff Barriers (NTB) discussion with EU negotiators in May, 2012.

Maintaining its earlier position, SIAM reiterated that India-EU FTA discussions should not have a separate chapter on automotive non-tariff barriers beyond the WTO TBT agreement. As WTO is discussing the automotive NTBs in a comprehensive manner, SIAM feels that any separate discussion under FTA will compromise our position in WTO.

EU negotiators feel that since at the present stage of discussions, the issues cannot be resolved at technical level, they will seek intervention of the politicians.



(L): Mr A S Puri, Chairman, SIAM International Relations Group & Vice President (Govt Affairs & Collaborations), at the 16th APEC Dialogue at San Francisco, USA.



SIAM Participated in APEC Automotive Dialogue, Kazan, Russia, May 2012

SIAM Participation in APEC Automotive Dialogue

APEC Automotive Dialogue: September 2011, San Francisco, USA

SIAM participated in the 15th meeting of the Automotive Dialogue (AD) held in San Francisco, California, USA in September 2011.

The meeting was attended by Government and industry representatives from Australia, Canada, China, Indonesia, Japan, Korea, Malaysia, Mexico, 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 & Vice President (Govt Affairs & Collaborations), Tata Motors and Mr Sugato Sen, Senior Director, SIAM. SIAM made a presentation about the negative effects of imports of used vehicles cause to the importing economies.

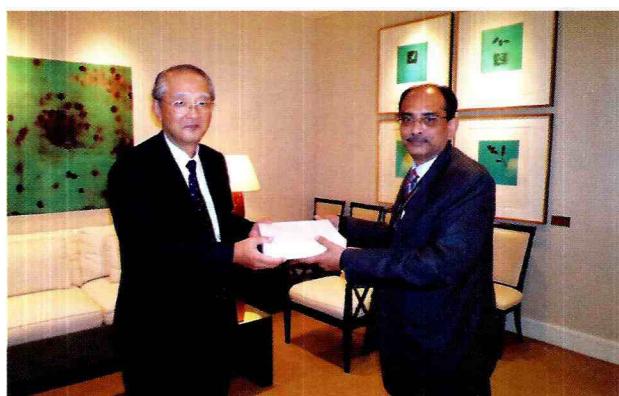
APEC Automotive Dialogue: May 2012, Kazan, Russia

APEC Automotive Dialogue Meeting was also held in Kazan, Russia in May, 2012. Apart from the SIAM team the other countries participating in the dialogue were from Australia, China, Indonesia, Japan, Korea, Malaysia, Mexico, Philippines, Singapore, Russia, Thailand, US and Vietnam. Amongst other things, the following issues were discussed:

- The status of global harmonization of standards under UNECE WP.29
- Japan proposal on international whole vehicle type approval
- Regulations on used vehicle trade
- Alternative fuel development programme in various countries
- Development of harmonized electric vehicle safety requirements
- USA perspective on remanufactured automotive products
- Policies and regulations related to advanced technology demonstration vehicles
- Common format for automotive data exchange

4th SIAM-JAMA High level Staff Meeting, December 2011, Tokyo

The 4th SIAM-JAMA high level staff meeting was held in December 2011 at Tokyo, Japan.



(L-R): Mr Y Nao, President, JAMA and Mr Vishnu Mathur, DG, SIAM, during SIAM - JAMA meeting

The JAMA team was led by President, JAMA Mr Y Nao and the SIAM team was led by Director General, SIAM, Mr Vishnu Mathur. During the meeting the trends of vehicles sales in both countries were shared. JAMA expressed their gratitude to SIAM for supporting JAMA for certification of components in India following the aftermath of Tsunami and Fukushima meltdown. JAMA also shared the concerns of floods in Thailand that has disrupted production and affected several JAMA members. President, JAMA cautioned that the year 2012 may be one of the toughest years, in terms of economic situation world-wide, due to various factors. Upcoming issues in India such as possibilities of Diesel



(L-R): Mr Patrick Blaine, Chairman, OICA; Mr Young Soo Kwan, Vice Chairman, OICA; Mr Klaus Braunig, MD, VDA and Mr Vishnu Mathur, DG, SIAM during OICA meeting

tax, Recall policies, FTA, etc. were discussed. JAMA also shared the status of Tax structure of vehicles in Japan and clean Diesel initiatives of JAMA members.



Geneva Motor Show 2011

Meetings in OICA

SIAM team visited Bucharest, Romania for the General Assembly of OICA in October 2011, where Mr Patrick Blaine from CCFA, France, took over as Chairman and Mr Young Soo Kwan from KAMA, South Korea took over as Vice Chairman.

SIAM team also joined the OICA meeting in Geneva in March coinciding with the Geneva Motor Show.

SIAM participated in China Auto Forum: Beijing, April 2012

Mr Sugato Sen, Senior Director, SIAM made a presentation on Indian Automobile Industry during China Auto forum in Beijing, China.



Mr Sugato Sen, Senior Director, SIAM addressing about Indian Automobile Industry at China Auto Forum Beijing

SIAM Participation in IAA India Day: September 2011, Frankfurt



Mr S Sandiya, President, SIAM

SIAM participated in the 'IAA - India Day 2011' in September 2011. The theme of discussion for this year was 60 Years of Indo-German Cooperation. A presentation was made by Mr S Sandiya, President, SIAM on the recent industry performance and the challenges ahead. Hon'ble Minister of Heavy Industries & Public Enterprises, Mr Praful Patel led the Indian delegation. On the sidelines of the event, SIAM and VDA had an interactive meeting on various technical issues.

SIAM hosted international delegations

Meeting with EU Delegation: September 2011, New Delhi

An EU delegation visited SIAM in September 2011 in New Delhi. The Delegation from EU included Mr P Jean, Acting Director, Directorate General for Enterprise and Industry, Ms. Barbara Bonvissuto and Mr B. Gargya, from the Delegation of the European Union to India. Discussions were held on likely areas of cooperation between India and EU with respect to the automotive industry.

Visit by Swedish Delegation: 27th September 2011, New Delhi

A delegation from Sweden visited SIAM in September 2011 in New Delhi. Mr Peter Ekenger from FKG-Winter Testing led the delegation. The delegation explained about export opportunities to Europe and North America. SIAM also made a presentation on the status of the automobile industry in India.

Visit by Dutch Delegation: September 2011, New Delhi

A Dutch delegation visited SIAM in September 2011 in New Delhi. The delegation had representatives from Royal Dutch Embassy, FIER Automotive and Innovam. SIAM updated them about the current state of the automobile industry in India.

Meeting with Chicago based Investors organized by DIPP: September 2011, New Delhi

SIAM was invited by the Department of Industrial Policy & Promotion (DIPP) to participate in a video conference with Chicago based investors in September 2011. The Indian team in New Delhi included Mr Chaitanya Prasad, Joint Secretary, DIPP, Mr Ambuj Sharma, Joint Secretary, MOHI&PE, Director, DoRTH, and representatives from Invest India, Govt of Tamil Nadu, Government of Punjab, Ministry of Finance. India's Consul General, Mrs Mukta D Tomar joined the discussions from Chicago along with the investors. The investors included representatives from companies like Novelis, Cognizant, Dana, Delphi, BorgWarner, Arvin Meritor, Visteon, Johnson Controls and FTE. Their aim was to understand from the Indian side about the current state of affairs and policy environment which could influence their decisions about investment in India.

Meeting with Swedish Delegation: in January 2012, New Delhi

On the sidelines of 11th Auto Expo in New Delhi, a Swedish delegation from 'Invest



SIAM meeting with Swedish Delegation: 9th January 2012, New Delhi

Sweden visited SIAM in January 2012. Invest Sweden is a part of Ministry of Foreign Affairs, Government of Sweden. It facilitates and promotes Industrial Cooperation, Partnership, Business Development opportunities, Strategic Alliances etc.

The Swedish Automotive Delegation was headed by Ms Annika Wennerblom - "Mayor of City of Trollhattan", Sweden, Ms. Eva-Lena Albihn, "Vice President, Business Region Göteborg" and was accompanied by senior officials from cities of Gothenburg, Skovde and Trollhattan.

SIAM made a presentation on current status of India's automobile industry and Swedish delegation also briefed about developments in the automotive sector in their country.

SIAM Human Capital Group

During the year, SIAM worked constantly to help the industry develop improved human resources, through its Human Capital Group activities, under the chairmanship of Mr Prince Augustin, Executive Vice President - Human Capital, Mahindra & Mahindra Ltd.



Prof N Akhouri, IMI; Mr Sugato Sen, Senior Director, SIAM and Mr Prince Augustin, Chairman SIAM Human capital group

The Human Capital Group was active throughout the year and carried out several activities to help the industry. The year saw formal constitution of Automotive Skills Development Corporation (ASDC) including recruitment of the CEO and other staff. Like

the earlier years the Group initiated the "Compensation Study" which was made by AON Hewitt.

SIAM 2nd HR Conclave

The Group organized the 2nd SIAM HR Conclave in Mumbai with support from ACMA and FADA, which was inaugurated by



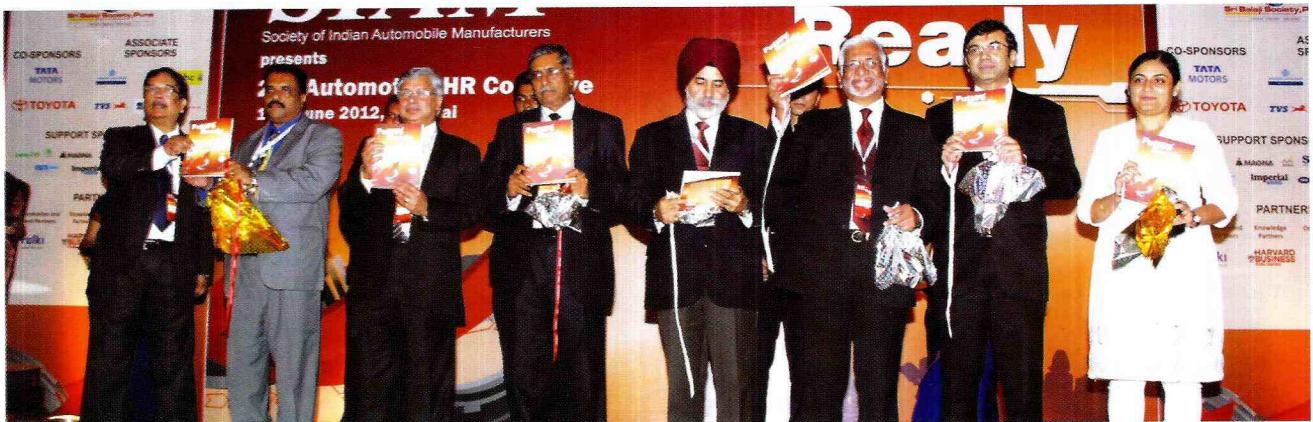
SIAM 1st Mentoring session for young HR Professionals



Dr Pawan Goenka President- Automotive & Farm Equipment, Mahindra & Mahindra SIAM during Lamp Lighting ceremony at the inauguration of SIAM 2nd HR Conclave, Mumbai



Mr Nikunj Sanghi, President, FADA at Podium, during SIAM 2nd HR Conclave, Mumbai



Launch of SIAM H R Journal

Dr Pawan Goenka, Immediate Past President, SIAM and President, Automotive & Farm Equipment, Mahindra & Mahindra and attended by almost 300 persons. Several experts, both from the industry and others spoke and made it a highly successful event. SIAM, this time, also partnered National HRD Network (NHRDN) and organized a Mentor Programme as part of the Conclave where senior HR professionals discussed issues of importance with young professionals and started a very useful and proactive initiative.



SIAM 2nd HR Conclave, Mumbai

Mega Job Mela at Bhandara, Maharashtra:

SIAM along with members and Gondia Education Society had successfully organized two days mega Job Mela at J M Patel College of Commerce, Arts & Science, Bhandara, Maharashtra. 12 member companies namely, *Ashok Leyland, FIAT Automobiles, Force Motors,*

General Motors, HeroMoto Corp, Maruti Suzuki India Ltd, Piaggio Vehicles, Toyota Kirloskar, Mahindra & Mahindra, Volkswagen, Honda Siel Cars, Tata Motors joined along with several companies from ACMA and together interviewed more than 4000 candidates and recruited / shortlisted 2041 students. Two days programme was inaugurated by Hon'ble Minister of Heavy Industries and Public Enterprises Mr Praful Patel.



(R-L): Ms Eckta, Assistant Director, ACMA, Mr Sugato Sen, Senior Director, SIAM, Mr Sanjay Khandare, Secretary MoHI & PE, Mr R C Jain, Secretary Manohar Bhai Patel Education Society (a local NGO) and other officials



Mega Job Mela at Bhandara, Maharashtra



(L-R): Ms Manju Dhamija, Associate Director, SIAM; Mr Sugato Sen, Senior Director, SIAM; Ms Eckta, Asst. Director, ACMA; Mr Praful Patel, Hon'ble Minister, MoH&I & PE and Mr Vishnu Mathur, DG, SIAM



Train The Trainer programme at Maruti Suzuki-May'12



Mr Praful Patel, Hon'ble Minister, MoH&I & PE and Mr Rajeev Kapoor, President & CEO, Fiat India

It was first such experience for SIAM and all participants including the Hon'ble Minister, Mr Praful Patel were extremely satisfied with the outcome of the Job Mela. SIAM members recruited / shortlisted a total of 1304 candidates at the Job Mela.

Automotive Skills Development Council (ASDC)

Last year SIAM along with ACMA and FADA had joined hands with Government of India to promote ASDC, the Automotive Skills Development Council for addressing the critical situation of skills gap facing our industry. In turn, ASDC had entered into an agreement with the National Skills Development Corporation (NSDC) to take up a Pilot Project as a proof of concept for ASDC mandate. The pilot was planned around three skills namely Machining, Service Technician and Driving. During this year ASDC Governing Council appointed Mr. Sunil K Chaturvedi as the CEO of ASDC to

spearhead the operations of the council which is registered as a society.

In the recent months, ASDC has been active in rolling out the pilot project. This process has been carried out with complete involvement of our industry. SIAM members have played a key role in helping ASDC initiatives. Toyota, TVS, Mahindra, Maruti, Hyundai, Eicher have all contributed. Team members were also drawn from ACMA and FADA organizations.

The first task was to complete the Curriculum development and was completed by early April 2012. Thereafter ASDC has been able to organize several programmes in quick succession. The first one was Train The Trainer (TTT) programme in April 2012. This was for Machining technician course organised jointly at the Toyota Institute in Bidadi near Bangalore and the Bosch vocational centre in Bangalore. Then in May 2012 the very first TTT for Service Technician was conducted at the Training centre at Maruti, Gurgaon. Trainers from participating institutes were given a thorough orientation on ASDC curriculum. Apart from the technical aspects, emphasis was also put on soft skills for trainers. It is increasingly being realised that Trainer is the key to successful skilling. Therefore, ASDC plans to support Trainer development programmes in future on a larger scale.

1st batch of students for the ASDC Machining course at BOSCH, Bangalore-June '12

Thereafter in June 2012 ASDC conducted successfully the very first students batch for



1st batch of students for the ASDC Machining course at BOSCH, Bangalore-June '12

Machining. This is being conducted at the Bosch Centre in Bangalore between June and August. Similarly the very first students batch for Service Technicians was started in July 2012 at Mahindra Institute in Bangalore. Each of these student batches is of eight weeks duration and will be followed by a four week OJT (on the job training). A total of forty five students are attending these batches. Learnings from these pilot batches will be used as feedback for refining curriculum where necessary.

Apart from the Pilot described above, ASDC is also participating in the Ministry of HRD's pilot for introducing Vocational Training in School curriculum. This pilot is starting first in Haryana will be followed by roll out in West Bengal and other states. ASDC is helping NCERT to develop automotive curriculum for classes IX - XIIth.

ASDC has also developed a draft curriculum for Driving. This is under review of an expert group comprising of representatives from those organizations in our sector that are involved with Driver Training viz MSIL, AL, VE, M&M and Toyota. ASDC also conducted a trial batch for skill assessment of Commercial Vehicle Drivers in Bhiwadi. Results of this trial were analysed by the expert group and a revised assessment process has been developed. In the coming few months larger trials will be conducted using the draft assessment process. Final process developed by the group will be adopted by all training providers eventually.

ASDC is also coordinating Auto Industry's participation in the next edition of World Skills Competition to be held in Germany in 2013. Honda, Tata, Maruti and Mahindra & Mahindra will be competing to decide India's entry in various categories.

ASDC is now well poised for scaling up its operations with a full-fledged Business Plan. Broadly, the plan would entail development of National Occupation Standards which will be done with complete involvement of SIAM members as well as ACMA and FADA members. In due course ASDC will also be putting together an assessment and certification process. It is expected that ASDC certification would receive widespread acceptance based on the value it would carry.

Right from these early days ASDC has ensured complete involvement of our Industry. ASDC has a plan to further strengthen this process over the next few years. This would be important for creation of an eco-system that would ensure that India's Auto industry does not suffer on account of skills shortage.

Sourcing Group

The SIAM sourcing Group under the Chairmanship of Mr Sudam Maitra Managing Executive Officer, Maruti Suzuki India Ltd and Co Chairmanship of Mr B B Parekh, Head Sourcing, Tata Motors Ltd is engaged in matters concerning sourcing of input for vehicles at an optimum manner.



Members during Sourcing Group meeting

The Group is involved in several initiatives including compilation of monthly prices of various raw materials, showing the trend of price movement of important raw materials.

The Group has now developed a vehicle price index to correlate the impact of increase in prices of input materials on the cost of vehicles.

The Group is also continuously monitoring and updating the list of tyres to be imported by OEMs for sales to their customers through their authorised dealers.

The Group is also engaged in deliberations regarding the implications of the two orders of the Department of Steel mandating BIS marking for steel related IS Standards including IS: 277 and IS 2062. The concerns of the Auto Industry regarding the two orders were taken up with BIS as well as Department of Steel with a request that Auto Grade steel should be exempted from mandatory marking.

SIAM team participated in the BIS Technical Committee meetings and placed the views and concerns of the Auto Industry regarding mandatory marking before the committee. The committee agreed to issue clarification to the Customs regarding non coverage of some Auto Grade Steel under IS 277. SIAM has also been given membership on the relevant BIS subcommittee.

Recently the draft Coated Steel Sheets standard was also discussed. The meeting decided to invite comments from members. Thereafter the draft would be finalized for wide circulation. The draft has been circulated to members

Sourcing Group Delegation visits China International Auto Parts Expo 2011

A delegation of 12 members from the SIAM Sourcing group visited the 5th China International Auto Parts Expo 2011 (CIAPE) held in Beijing, China in September 2011. Delegates from several OEMs like Fiat India, Cummins,



A delegation from the SIAM Sourcing group visited the 5th China International Auto Parts Expo 2011 (CIAPE) held in Beijing, China from 8th to 10th Sept 2011

Maruti Suzuki, Mahindra & Mahindra, Tata Motors and VE Commercial Vehicles visited the Expo.

This event was supported by the Chinese Ministry of Commerce as well as the Indian Embassy in China.

Apart from visiting the booths of the participating organizations, the two conferences were also attended by members namely; China International Auto Parts Development Summit Forum 2011 and 2011 AIAG Auto Parts Purchasing Leadership and Suppliers Forum. A directory of the Chinese companies participating in CIAPE is available in SIAM Office for the reference of members.

CIAPE had also provided a booth to SIAM in the Expo which was used to promote SIAM activities and disseminate information about Indian automotive industry. Delegates from OEMs were also available at the booth from time to time to meet visitors keen to establish contact with the Indian OEMs.

Logistics Group

SIAM Logistics group under the chairmanship of Mr M M Singh, Chief Operating officer (Production) of Maruti Suzuki India Ltd and Co-Chairmanship of Mr Prem K Verma, CEO TML Distribution Company Ltd (Tata Group) was engaged in developing strategies for im-



Officials at SIAM logistics group meeting

provements in the logistics both inbound as well as out bound for the industry covering Road, Rail as well as Coastal Shipping Routes for out bound delivery of finished vehicles and coordination for inbound logistics through reusable packaging crates.

The group deliberated on the concept of reusable packing crates which can be rented from the crate supplier. These would avoid capital investment in crates and also save on storage space for empty crates. While pallet size has been standardized, there is a need to standardize sizes of crates also to facilitate their better utilization.

Adviser (Freight Marketing) Railway Board, Ministry of Railways, participated the meeting and had an exchange of views with the members on the progress of the auto related rail policies. She informed that the revised draft private freight terminal policy (PFT) is ready and being posted on the Railways Website inviting comments. This would also take care of the requirements of the members from the Auto Hub policy which is presently in abeyance owing to the Government's policy on land leasing etc. The AFTO Policy is under review and the suggestions received from SIAM will be taken into consideration while finalizing the review.

The Director (Wagon Design) of RDSO Lucknow, made a presentation, through teleconference, on the latest Auto Wagon

design developed by them called BCACBM. Inputs and comments from OEMs were invited on the design. RDSO invited specific inputs from the two wheeler manufacturers regarding their concerns in the usage of the new design.

SIAM Two and Three Wheeler Group subsequently held a meeting and specific comments were sent to the railways.

Comments on 4 wheeler transportation were also sent.

A team of SIAM members visited RDSO Lucknow in June 2012 and discussed the wagon design suitability. It was conveyed to RDSO that the design would call for some modifications for it to be optimally utilized by some members. RDSO informed about other designs under approval with RDSO that could be utilised by OEMs.

New Vehicle Classification Introduced

SIAM Vehicles Classification group met under the chairmanship of Mr Jnaneshwar Sen, Chairman "Vehicles Classification group" and Senior Vice President, Honda Siel Cars India Ltd.

SIAM had introduced New Classification in the Passenger Vehicles and Commercial Vehicles segments last year. This year SIAM had proposed various changes in existing two wheeler classifications and the lower end of the commercial vehicles classification to capture the market segments better. The new proposal on two wheeler classification was supported by Group on Vehicles Classification. SIAM has also introduced reporting of model wise data of two wheelers.



Officials at SIAM Vehicle Classification group meeting



(L-R): Mr Sugato Sen, Senior Director, SIAM; Mr Jnaneshwar Sen, Chairman "Vehicles Classification group" & Senior Vice President, Honda Siel Cars India Ltd; and Mr Dikshant Negi, Assistant Manager, SIAM

In respect of commercial vehicles, while SIAM has started giving the names of models covered under each sub-segment and segment, members sought more time to study the new classification for smaller commercial vehicles.

SIAM also proposed introduction of new reports by giving fuel wise & models wise production, domestic sales and exports of passenger vehicles, which was approved by the Group and SIAM has introduced the new reports from April 2012.

The flash reports, as per the new format, have been introduced from April 2012. This has been possible with the continuous efforts put in by the Group and the resource persons in member companies who provide the data at the beginning of every month to SIAM.

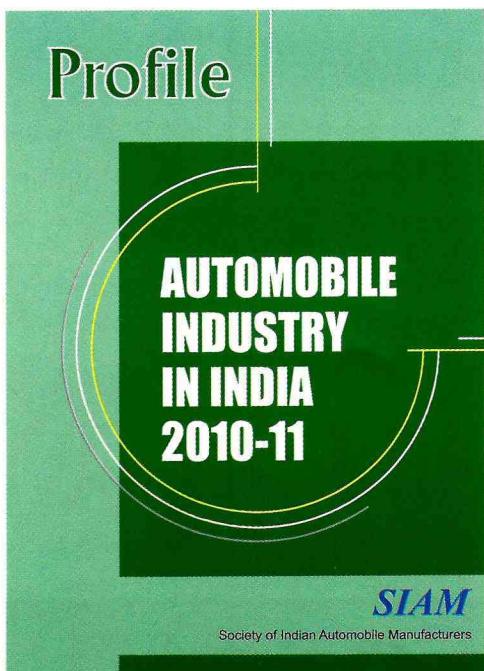
The New classification of Two wheelers

Motorcycles	Scooters	Mopeds
Electric	Electric	Electric
$\leq 75\text{cc}$	$\leq 75\text{cc}$	$\leq 75\text{cc}$
$>75\text{cc} \& \leq 110\text{cc}$	$>75\text{cc} \& \leq 90\text{cc}$	
$>110\text{cc} \& \leq 125\text{cc}$	$>90\text{cc} \& \leq 125\text{cc}$	
$>125\text{cc} \& \leq 150\text{cc}$	$>125\text{cc} \& \leq 150\text{cc}$	
$>150\text{cc} \& \leq 200\text{cc}$	$>150\text{cc} \& \leq 200\text{cc}$	
$>200\text{ cc} \& \leq 250\text{cc}$	$>200\text{ cc} \& \leq 250\text{cc}$	
$>250\text{ cc} \& \leq 350\text{cc}$	$>250\text{ cc} \& \leq 350\text{cc}$	
$>350\text{ cc} \& \leq 500\text{cc}$	$>350\text{cc}+$	
$>500\text{ cc} \& \leq 800\text{cc}$		
$>800\text{ cc} \& \leq 1000\text{cc}$		
$>1000\text{ cc} \leq 1600\text{cc}$		
$>1600\text{cc}+$		

Profile of the Automobile Industry in India 2010-11

The book released in January 2012 provides a complete profile of SIAM members which include all leading vehicle manufacturers and vehicular engine manufacturers in India.

It provides details on each of our member companies - the official address & plant locations, names of the CEO, products manufactured, installed capacity, gross turnover, number of employees, production, domestic sales, exports, imports, R&D expenditure, collaborations details, quality certification etc.



Content:

Introduction

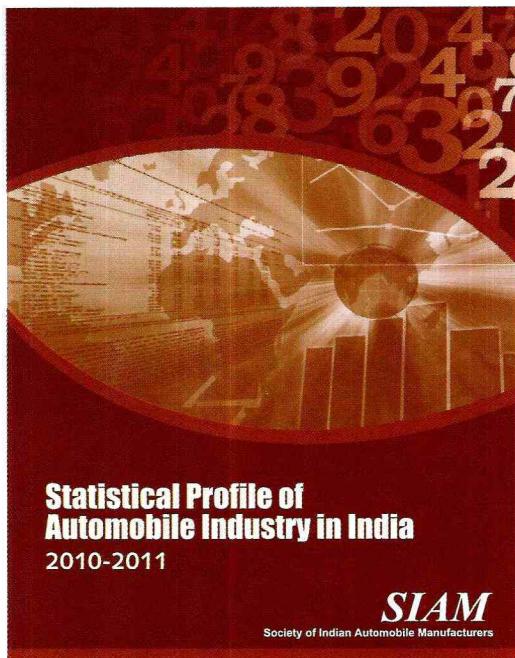
- About SIAM
- SIAM Members
- AIAM/SIAM Past Presidents
- SIAM Agenda
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Profile of the Automobile Industry in India

- A Statistical Profile (2009-10 & 2010-11)
- Gross Turnover of Automobile (2009-10 & 2010-11)
- R&D Expenditure (2009-10 & 2010-11)
- Installed Capacities (2009-10 & 2010-11)
- Cumulative Investment (2009-10 & 2010-11)
- Category-wise (2005-06 to 2010-11)
 - Production, Domestic Sales & Exports

Profile of Member Companies

Plant Locations



Content:

Introduction

- Segment Wise
 - Production & Sales (1960 to 2011)
- Category & Companywise
 - Production & Sales (2005-06 to 2010-11)
- Registered Motor Vehicles (as on 31st March 2009)
- Road Accident (1970-2009)
- Top 10 Exports-Imports Destination
- Duty Structure for Automobiles (1997-98 to 2010-11)
- World Production by Vehicles Type (2009 & 2010)

Statistical Profile 2010-11

The book released in January 2012 provides comprehensive data on the automobile industry in India. It gives valuable data on production, Domestic sales, exports, market share of manufacturers, state-wise registration, city wise registration, etc. giving the growth trends of the industry. Important data on the road transport sector is also available along with the historical excise and customs duty structure.

The book also gives state & city wise vehicle penetration in the country along with vehicles population.

This would be a useful reference for drawing up production programmes, reviewing sales performance and also in evolving marketing strategies.

Trade Fair Group

SIAM has announced the plan for increasing its Trade Fair activities to increase the visibility of the industry. It has been decided that SIAM will start handling trade fairs independently and develop its own Trade Fair team.

The following shows have been announced:



SIAM has appointed an agency in Sri Lanka to organize the 2nd Auto Show India in Colombo, Sri Lanka from January 4-6, 2013.

Sri Lanka has emerged as one of the most important destination of India's automotive Industry and many of our members are



Members discussing during SIAM Trade Fairs group meeting



exporting to Sri Lanka in a significant manner. However, there is a lack of stability in policies which affects trade and it was felt that there is need to establish relations with the policy makers and industry bodies in Sri Lanka to do uninterrupted business in one of our most important, and growing, neighborhood country.



The Bus & Utility Vehicles show is scheduled to be held in Greater Noida

Expo Mart from February 14-17, 2013. The details are being worked out and members will be kept informed.



Shows have been planned to be held in Kolkata in December 2012 and Bangalore in April 2013.

IT Group

The Group met during the year under the chairmanship of Mr N Chandrasekhar, Special Director and CIO, Ashok Leyland and co-chairmanship of Mr Vijay Sethi, Vice President (Information System) & CIO Hero MotoCorp Ltd.

Under the group CIOs from both SIAM and ACMA deliberated the need of standard data interchange mechanism for all OEMs and suppliers to exchange data and followed up with an action plan and agreed to adopt an Electronic Data Interchange (EDI) standard adopted from international standards and localized specifically for Indian Automotive Industry to ensure consistency of data interchange.

Service Heads Group

The Group is chaired by Mr Pankaj Narula, Executive Director (Service), Maruti Suzuki India and co-chaired by Mr Rajesh Mukhija, Associate Vice President, Hero MotoCorp Ltd. The group deliberated on formulation of code for Indian Vehicle Recall and on various common concern faced by the industry associated to the service sector like: General Insurance Council decision on bifurcation of paint material and labor charges in repair bills of motor vehicles, Industry practices and obligations to provide spare parts.

The group held its interaction meeting with Central Pollution Control Board to discuss the framing of Environmental Standards & Effluent Standards for Automobile Service Stations. The group is also involved in working out the modalities in implementing the fitness certification system for private cars by undertaking the test of the vehicles at the dealer's premises on request of Environment Pollution Control Authority.



(L-R): Mr Rajesh Mukhija, Associate Vice President, Hero MotoCorp Ltd; Mr Vikram Kirloskar, Vice President, SIAM; Mr S Sandilya, President, SIAM and Mr Vishnu Mathur, DG, SIAM during the launch of code for Vehicle Recall

TECHNICAL AGENDA

TECHNICAL COUNCIL

The Technical Council is chaired and co-chaired by Dr John Chako, President & Managing Director, Volkswagen India and Mr Vinod Dasari, Managing Director, Ashok Leyland respectively. The council reviews and discusses the activities related to groups on Frontier Technology; Diesel Image; Automotive Infotronics; Styling & Design; Recycling and Gaseous Fuel.

Frontier Technology Group

The group is chaired by Dr Rao Chalasani, Director (AVDC), General Motors India and co-chaired by Mr A Srinivas, Sr. General Manager (R&D), Mahindra & Mahindra. 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. The group has led to a successful completion of one of the first milestones in the form of submission of the study report on electric mobility to the Government. Subsequently, the group finalised the industry views on National Electric Mobility Mission Plan (NEMMP) 2020. The Group will continue to remain engaged



Mr S Sandilya, President, SIAM at the Podium at Technology Day on Hybrid and Electric Mobility

during the process of formulation of policies from the recommendation of the NEMMP 2020 by Government of India, and facilitate their implementation.

SIAM under the aegis of Ministry of Heavy Industries and Public Enterprises organised Technology Day on Electric Mobility during the Auto Expo 2012 on 6th January 2012 at Pragati Maidan, New Delhi, with presentations from experts of international repute and delegates from industry, Senior Officers from the Government, Academia and Students, brought huge success to the event.



Technology Day on Hybrid and Electric Mobility. Mr S Sundareshan, Secretary, Ministry of Heavy Industries and Public Enterprises presided over as Chief Guest. Also seen in the photograph from left, Dr Rao Chalasani (left), Chairman, SIAM Frontier Technology Group, Mr Vikram Kirloskar, Vice President, SIAM, Mr S Sandilya, President, SIAM



Technology Day on Hybrid and Electric Mobility. Seen in the photograph delegates from including Government, Industry and Academia.

The Group also led other areas including light-weighting and to continue work on future needs in these areas. Globally, lightweighting has been an important technology development area to focus on and the group will strive to look for suitable framework to have Indian industry's involvement for success of this initiative. The group also served as a platform for implementation of the R&D project on Hydrogen blended CNG under Ministry of New and Renewable Energy. The group plans to propose suitable projects on alternate powertrain technology under R&D grants from the various Government organisations.

Diesel Image Group

SIAM Diesel Image Group chaired by Mr Anant S Talaulicar, Chairman & Managing Director, Cummins India had meetings to review the status of the possibility of additional taxation of Diesel Passenger cars and several representations were done by SIAM to Government on this subject. The group is planning to organize the next conference on Diesel in November 2012. The group will also review the impact of premium diesel in new vehicles using Common Rail technology as some members have raised concerns on the impact of such fuels on CRDI engines due to presence of metallic based additives.

Automotive Infotronics Group

The group was chaired by Mr Jayendra Parikh, Executive Director, Advanced Engineering, Ashok Leyland and co-chaired by Mr G K Binani, General Manager, Tata Motors. The group studied and focused on the various recommendations being made by the Government on different aspects like RFID Tags, GPS based system for vehicle tracking, potential Intelligent Transport System (ITS) requirement as proposed in Urban Bus Specification etc. The group studied the implication and action required before the same are mandated.

The group has active participation in Transport Engineering Division sub-committees, Bureau of Indian Standard (BIS) and Inter-Ministerial Core Group on ITS frame work for India formed by MoUD.

Styling and Design Group

The group is chaired by Mr C V Raman, Executive Director (Engg.), MSIL and co-chaired by Mr Pankaj Jhunja, General Manager, Tata Motors. The 6th Styling & Design Conclave and the 4th Automotive Design Challenge (ADC '11) were organized by SIAM Styling and Design Group in New Delhi on January 7th, 2012 on the sidelines of Auto Expo 2012 with participation from more than 180 delegates and designers from all over the world. The event was divided in three sessions, covering the direction and pace of the automotive design in India and the direct and indirect factors influencing the developments. Since automotive design is at an embryonic stage in India, there were also talks about having a focus on achieving accelerated efforts in automotive design. Mr Vikram Kirloskar, Vice President SIAM laid emphasis on automotive design being a form of art more than anything else. The ever evolving Automotive scenario, puts immense importance on the automotive designers as global automotive players are actively looking at India, not only as a production hub for their products, but also as a key area to establish and operate their design facilities. The chief



Mr Toshiyuki Nishino, Manager - Styling Design Group, Suzuki 2 - Wheeler at the podium during SIAM 6th Styling & Design conclave, New Delhi

guest for the event, Mr Ambuj Sharma, Joint Secretary, Ministry of Heavy Industries, congratulated SIAM Styling and Design Group for establishing Styling and Design Conclave as one of the most important events and laid emphasis on the importance of designing of a vehicle. He assured that the government will act to the best of its capability in bringing up the design competence.

SIAM 4th Automotive Design Challenge (ADC'11), 7th January 2012, New Delhi

SIAM's 4th Automotive Design Challenge (ADC) was held in parallel with the 6th SIAM Styling & Design Challenge at Hotel Lalit, New Delhi. With more than 100 entries received from Engineering/ Design students across the country. The theme of this year's ADC was "*Green Mobility - Design Solutions*" (*Nonfossil fuel based means of Mobility*). 10 Best models were shortlisted for Phase - II and top 3 designs



Jury at Automotive Design Challenge '11



(R-L): During the award ceremony: Mr Vishnu Mathur, DG, SIAM; Mr C V Raman, Executive Director (Engg), MSIL; Mr Ambuj Sharma, JS, MoHII & PE and Mr S Sandilya, President, SIAM

including a special jury award (including cash prizes, trophies and certificates) were presented to students. Special Jury Award was awarded to Chirayush Shinde from IDC, IIT Bombay, the 2nd Runners up prize went to Arunivas A of IDDC, IIT Delhi, the 1st Runners up prize was won by Pratyush Devadas from NID and the winner of the Styling & Design was Advaith Srivaths from IDC IIT Delhi.

Gaseous Fuel Group

Gaseous Fuel Group is chaired by Mr K D Singh, Vice President - Corporate Services, Maruti Suzuki India Limited.

The Group is constituted for considering the importance and benefits of Gaseous Fuels for end-user, environment and economy and to help in addressing the issue of energy security. The group interacted with City Gas Distribution (CGD) companies and the regulator for increasing the penetration of gaseous fuels in the country.

The group organised the first ever *Auto-CGD Industry Round Table* in New Delhi on 25th Jan 2012. During the roundtable discussion, SIAM expressed that the auto industry has focused on bringing multiple technologies and conviction that CNG is a valuable option. CNG Technology has its own challenges that need the attention of policy makers. The Group ensured to extend the support to policy makers towards CNG as an auto fuel. CGD companies shared their perspective on CNG as an auto



(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

fuel, expectations from automobile companies and SIAM.

The Group also met the Petroleum and Natural Gas Regulatory Board with an objective to initiate a dialogue with PNGRB and SIAM.

Recycling Group

The meetings of the group were held under the chairmanship of Capt NS Mohan Ram, Advisor, TVS Motor Company and co-chairmanship Mr Sanjeev Mandpe, General Manager, Mercedes Benz India. The group has drafted End of Life of Vehicle (ELV) regulation for India. Several activities were taken by the group; such as



Capt. N S Mohan Ram addressing at Recycling Discussion

Seminar in India and abroad, and meeting with Japan Automotive Manufacturers Association (JAMA) to discuss the developments on



Group photograph of SIAM and JAMA officials

documentation of dismantling of vehicles at Global Automotive Research Centre (GARC), Chennai, organizing and attending Recycling

ELV in India. The group is learning from the experiences of other countries where ELV regulation are in practice.

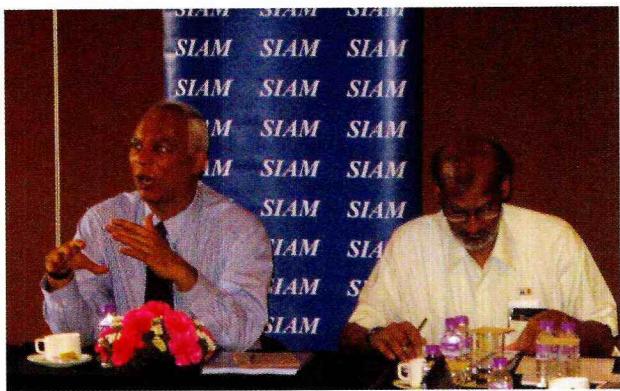
NATIONAL AND INTERNATIONAL REGULATION COUNCIL (NIRC)

The National and International Regulation Council (NIRC) is chaired by Mr P M Telang, Managing Director, Tata Motors Limited and co-chaired by Mr I V Rao, Chief Operating Officer (Engineering), Maruti Suzuki India.

The council reviews the issues and activities related to groups on Emission and Conservation; CMVR and Safety Regulation; International Harmonisation; 2 Wheeler and 3 Wheeler. The council discusses several technical



(L-R): Capt Mohan Ram, Chairman, SIAM Recycling Group, and Adviser, TVS Motor Company; Mr Ambuj Sharma, JS, MoH&PE; Dr R Chidambram, Principal Scientific Adviser, Govt. of India; Mr Vishnu Mathur, DG, SIAM, at International Seminar



(L-R): Mr P M Telang, MD, Tata Motors, Chairman of SIAM NIRC; Mr IV Rao, COO, MSIL; during the 5th NIRC meeting, March 2012, New Delhi

and regulatory issues and suggests policy level decision from time to time to the Government of India.

Central Motor Vehicle Rule (CMVR) and Safety Regulation Group

CMVR and Safety Regulation Group is chaired by Mr S Ravishankar, Vice President, Tata Motors Ltd and co-chaired by Mr R Kanitkar, Sr. Chief Engineer, 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 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 (CMVR-TSC), Automotive Industry Standard Committee, and Transport Engineering Division (BIS).

Emission and Conservation Group

The Group is chaired by Mr J K Deb, Vice President, Fiat India and co-chaired by Dr Mathew Abraham, General Manager, Mahindra & Mahindra on issues related to emissions from the vehicles and its regulations, future roadmap and fuel efficiency. SIAM Emissions & Conservation Group held discussions on various issues relating to future Emission Roadmap beyond 2010, new Idle Emission Regulations, Catalytic Converters life etc., primarily through the meetings of Standing Committee of Emission (SCOE) under Ministry of Road Transport & Highways. Detail discussions were held to evolve a SIAM position on long term Emission Roadmap with the first step being implementation of BS IV Emission Norms all over the country. Discussion are underway on the various issues related to implementation of Fuel Efficiency regulations and labelling programme for four wheelers with Ministry of Road Transport and Highways and Bureau of Energy Efficiency, Ministry of Power. Automobile Industry is continuing with the voluntary display of the Fuel consumption value of each passenger vehicles and two-wheelers at the point of sale since the year 2009.



(L-R): Mr K K Gandhi, SIAM; Mr S Ravishankar, Chairman, SIAM CMVR and Safety Regulation Group; Mr Z Mujawar, M&M and Mr T M Balaraman, Hero MotoCorp during the CMVR and Safety Regulation Group meeting

International Harmonisation Group

The group under the chairmanship of Mr Z A Mujawar, Adviser, Mahindra & Mahindra and co-chairmanship of Mr P K Banerjee, Heads - Homologation and products evaluation Tata Motors Ltd reviewed and discussed Indian Groups activities under WP.29 relating to Passive Safety; General Safety Provision; Light & Light Signalling, Brakes and Running Gears, Noise, and Pollution & Energy. The group also discussed emerging technologies for



Group photograph of officials from MoRT&H, IIP, ARAI, SIAM, ACMA, BIS, CIRT and ICAT etc., during the 38th CMVR-TSC and 44th SCOE meeting at IIP, Dehradun, 9th July 2012

Emissions and Road Safety in context of Indian requirement. The group also interacted with the Ministry of Road Transport and Highways on international harmonisation of regulations.

Two Wheeler Group

SIAM Two-Wheeler Group led under the chairmanship of Mr Harjeet Singh, Vice President, Hero MotoCorp and Co-Chairmanship of Mr R Narasimhan, General Manager, Bajaj Auto discussed several issues on implementation of upcoming regulations relating to electromagnetic interference, Lighting standards, tell-tales etc. The Two-Wheeler Group actively participated in various committees of International Motorcycle Manufacturers Association (IMMA) for discussion of subjects at Global forum, such as

CO2 Regulation, upcoming emission and safety regulations roadmap in Europe, including Brakes and Noise testing procedures, etc. The group has participated in the International Motorcycle Manufacturers Association (IMMA) committee meetings on issues of CO2 regulation and fuel emission norms.

Three Wheeler Group

The Three-wheeler Group actively worked under the chairmanship of Mr S S Sane, Senior Vice President, Piaggio Vehicles. The group is looking at the possible next stage of emission norms for Three-wheelers. Members also discussed the concerns raised by Hon'ble Karnataka High Court and discussing further steps that could be considered for making the three-wheelers safer.



IMMA -SIAM delegate, representing Two Wheeler Group during IMMA visit to SIAM, New Delhi

Urban Bus Specification

Mr S K Lohia, Director (OSD) & Ex. officio Joint Secretary, Ministry of Urban Development (MoUD) had stated in the very first meeting that the Ministry was keen on funding buses under JnNURM phase II project to transform the city bus urban transport scene across India through introduction of modern low floor and semi low floor intelligent transport system enabled buses. With this aim, recommendatory draft specification on urban bus put up for deliberations and finalisation. SIAM worked with core group under Urban Mass Transit Company (UMTC) constituted by MoUD. The core group discussed and finalised specification for floor height of 400mm, 650mm, Mini and Midi buses and submitted the same to MoUD. Further, the core group also discussed and finalised the specifications for Intelligent Transport System (ITS) applicable to low floor height buses.

Road Freight Segment to be Greener in India

Society of Indian Automobile Manufacturers alongwith Clean Air Initiative - Asia organized a seminar on "Greening the Freight Road Transport" on 9th January 2012 in New Delhi. The broader aim was to establish a partnership of private sector and other organizations as part of efforts to establish a 'Green Freight India Program' that will cover clean technologies, freight logistics, financial mechanisms, and other policy and capacity building measures. Dr Bhure Lal, Chairman, Environment Pollution Control Authority (EPCS), inaugurated the seminar and the keynote address was delivered by Mr PremVerma, CEO, TML Logistics (Tata Motors) and co-chairman, SIAM Logistic Group. Dr Kirit Parikh, Chairman, Low Carbon Committee of Planning Commission mentioned that there was a need to look at 'Hub and Spoke' model for minimizing the use of road transport for long distance operations and shar-



Green Freight India Seminar in New Delhi during Auto Expo 2012; Speakers including Dr Kirit Parikh, Chairman, Committee on Low Carbon, Planning Commission; Mr Vikram Gulati, Director, NATRIP; Mr Prem Verma, Chairman, SIAM Logistic Group; Ms Sophie Punte, ED, CAI-Asia and others and Others

ing the burden with railways to ensure the fleet remains green during life time of its operation. Dr Venkat Srinivas, Special Director, Ashok Leyland shared some of the advancements being done in vehicle technology out of which better aerodynamic designs and improved tyre technologies would return the maximum benefits in terms of fuel efficiency gains, during the vehicle operation. Speakers also suggested that extensive use of Intelligent Transport Systems synchronized with matching infrastructure and administrative streamlining would reduce idle losses which are significant in the Indian context. Ms Sophie Punte, Executive Director, CAI-Asia gave an overview of how the efficiencies of the freight segment are being enhanced across the world.

UK Companies Shared Concepts on Energy Efficient Automotive Technologies

Society of Indian Automobile Manufacturers (SIAM) in partnership with UK Trade and Investment (UKTI) and Society of Motor Manufacturers and Traders, UK (SMMT), the leading UK Trade Associations had organised a seminar in New Delhi on 10th January 2012. UK's expertise in four key technologies identified by the UK Automotive Council Technology Road Map; viz. Improvement of Internal



Speakers on Dias during SIAM-UKTI & SMMT seminar in New Delhi, Jan' 2012

Combustion Engines (ICE), Light Weighting, Electric Motors & Powertrain Electronics and Energy Storage & Management were presented. The Seminar was chaired by Dr Omar Hadded, Vice President, Tata Motors European Technical Centre (UK). The conference provided an opportunity to Indian and UK companies to share their ideas and expertise on energy efficient technologies and how the UK and India can work together to further develop these technologies and commercial opportunities.

SIAM's Interaction with Indian Oil Corporation

The first interaction between Indian Oil Corporation Limited (IOC) and SIAM was held on 20th October 2011 in Mumbai. Mr R S Butola, Chairman, IOC presented the R&D capabilities, future fuel quality scenario and lubricant technology. Dr Mathew Abraham, co-chairman, SIAM Emission and Conservation Group & Sr. General Manager, Mahindra & Mahindra presented views and concern of Automobile Industry with respect to fuel quality and availability. SIAM also pointed out that IOC should start thinking of supplying Aqueous Urea Solution 32 for Diesel vehicles so that Retail outlets of Oil companies would become one point shop for all fuel related requirements of a vehicle. IOC informed that BS IV fuel could be extended to more cities in due course by the



(L-R) Mr R S Butola, Chairman, IOC and Dr Pawan Goenka, President – Automotive & Farm Equipment, Mahindra & Mahindra addressing SIAM - IOC gathering, Mumbai, October 2011



Dr R K Malhotra, Director (R&D), IOC and Dr Pawan Goenka, President – Automotive & Farm Equipment, Mahindra & Mahindra with other delegates

Government of India. Availability of Ethanol has been one of the major concerns for the oil companies and at the present level, the oil companies are at the best able to blend upto 2.5% of ethanol and have not even reached 5% blending.

National Highway Traffic Safety Administration, USA visit to SIAM

A delegation led by Mr David Strickland, Administrator, National Highway Traffic Safety Administration (NHTSA), Department of Transport, USA visited India from 21-24 February 2012. The delegates visited SIAM on 21st February 2012. Other officers in the delegation were Daniel Smith, Senior



(L-R): Mr R Budhraja, ATMA; Mr Vishnu Mathur, DG, SIAM; Mr S Sandilya, President, SIAM, and Mr David L Strickland, Administrator, NHTSA

Associate Administrator for Vehicle Safety, Christopher Bonanti, Associate Administrator for Rulemaking, Jeff Michael, Associate Administrator, Research and Program Development, and Mary Versailles, Senior Policy Advisor, International Policy and Harmonization Division. The purpose of this visit was to meet with US counterparts in the Indian Government and Indian Automotive and Auto Parts Manufacturers to discuss broadly the vehicle and road safety regulations in India along with the Certification system and its enforcement.

Annual SIAM-JAMA Technical Group Meeting

The 6th SIAM-JAMA meeting and the 1st SIAM -JAMA Motorcycle meeting were held on 30th November and 1st December 2011, in JAMA office at Tokyo.

During the meeting various subjects were discussed viz. Environment and CO2 related regulations In Japan and India, Japanese experience on implementing ethanol fuel/bio diesel and their roadmap for introducing HEV and BEV vehicles. The two associations further shared the status of ELV regulations in both countries. JAMA also gave an overview of I WVTA during the discussions. Fuel Efficiency, Evaporative Emission durability and determining WMTC equivalent limits were discussed for Two Wheelers.



Mr C P Joshi, Hon'ble Minister (center) alongwith SIAM CEOs, ARAI, CIRT officials and Others at MORT&H, New Delhi

Meeting of SIAM CEOs, alongwith other stakeholders, with the Hon'ble Minister of Road Transport and Highways, Mr C P Joshi

SIAM CEOs met with the Hon'ble Minister Mr C P Joshi and discusse dissues for enhancing safety of vehicles and the need to finalise long term emission roadmap. Other stakeholders were ARAI, ICAT, CIRT etc.

Mr S Sandilya heads International Motorcycle Industry (IMMA)

Mr S Sandilya, President, Society of Indian Automobile Manufacturers (SIAM) has been unanimously voted and elected as the President of International Motorcycle Manufacturers Association, Geneva (IMMA) for the period of 2012 to 2014. Mr Sandilya was elected during IMMA's recent General Assembly held on 23rd May 2012 at Madrid. IMMA represent a



SIAM and JAMA delegates during technical group meeting Tokyo, December 2011



SIAM and IMMA delegate during IMMA General Assembly meeting, 23rd May 2012 at Madrid

fraternity of Two-Wheeler manufacturers across the world including Australia, Canada, Japan, India, China, USA, Europe (including Spain, Italy, UK) and South East Asia

(including Indonesia, Malaysia, Philippines, Thailand, Taiwan) together producing about 50 million powered motorcycles every year.

This is the first time in the Indian Automotive history that an Indian has been elected as the 'numerouno' of an International Motorcycle Manufacturers Association. It was also apt for the Indian Two-Wheeler industry to assume the pinnacle post, being the second largest

producer of powered two-wheelers in the world, after China.



Mr S Sandilya, President, SIAM taking over charge of IMMA President

PUBLIC POLICY

Society of Automotive Fitness and Environment (SAFE)

An estimated 1.3 million people are killed in road crashes worldwide each year and as many as 50 million are injured. India accounts for 8-9% of the same. For every death, 20-30 people are disabled, many permanently. Road traffic injuries are the leading worldwide cause of death among young people aged between 15 to 29, which is the most productive age and the second most common cause of death for those aged 5 to 14. If significant preventive actions are not taken, the World Health Organization (WHO) estimates that by 2020 road trauma will rank as the sixth biggest cause of death.

In India, the fatalities per 1000 vehicles has shown a declining trend, from about 20 person killed by 10,000 vehicles in 1997-98, to about 11 person per 10,000 vehicles in 2009, indicating

that the vehicles being produced are becoming more safer. However, the absolute numbers are very high and needs coordinated efforts.

The auto industry in India has been taking several steps to make vehicles safer. There are serious discussions to implement safety roadmap aligning with International safety regulations.

SAFE along with automobile manufacturers have taken initiative by working in the area of Road Safety and In-use Vehicle Management and tried to spread awareness among citizens of India by following activities carried out in 2011 - 2012:

- World Environment Day - 5th June 2011: SAFE organized 4500 free PUC checkup camps across India with the help of SIAM members and support from member's dealers

SIAM

Society of Indian Automobile Manufacturers

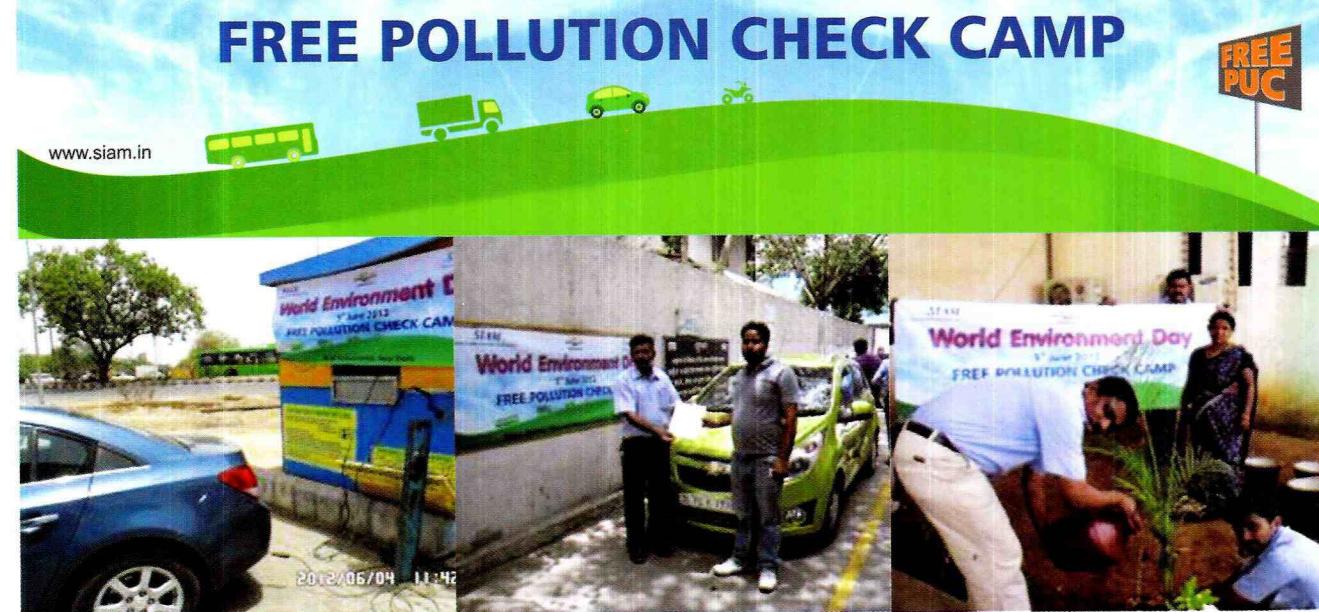
SAFE (a SIAM initiative)

Society for Automotive Fitness & Environment

World Environment Day

5th June 2012

FREE POLLUTION CHECK CAMP



- National Road Safety Week 2012: SAFE organized several programs to promote road safety awareness and training for students, drivers and citizens. Some of the highlights are:
 - Road safety programs at 3500 dealers network across India
 - More than 150 refresher driver training programs
 - Health check up camps for heavy commercial vehicle drivers in 11 states
 - Free Tyre check up camps in Delhi
- Various Road Safety drives for school teachers, drivers and students
- Refresher training programs for Government and Corporates drivers
- Participated in important ministerial groups working in the area of Road Safety and in use vehicle management.

All these activities have been successfully implemented with the support from SAFE and SIAM members, dealers support and encouraging support from NGOs, Corporates, Ministries, State Transport Department, Traffic Police, Pollution Control Board, Educational Institutions etc. We would like to thank all the stakeholders who have shown interest in this important issue of saving a single life on road.

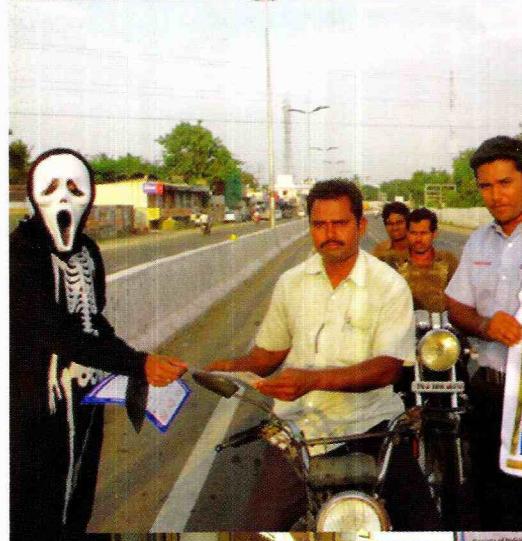
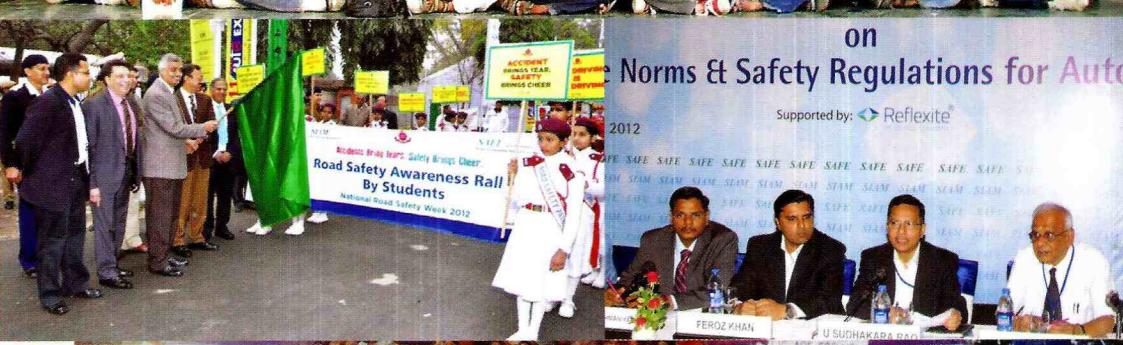
Every year SAFE organizes its Annual Convention with a specific theme and the venue is deliberately chosen to cover different states of India. This year the SAFE Annual Convention was held on 3rd May 2012 at Lucknow with the theme of "Path Towards Road Safety: Best Practices & Intelligent Transport System". The objective of this convention is to bring together experts, policy makers and stakeholders to exchange ideas and best practices adopted by them in improving road safety and the importance of Intelligent Transport system which helps in bringing safety on our roads.

SAFE Annual Convention inaugurated by Hon'ble Minister of Transport Uttar Pradesh Mr Raja Mahendra Aridaman Singh with the presence of senior officials from Transport Department, Automotive Industry and representatives from different states of India working in the area of Road Safety.

SAFE works with stakeholders, national & international experts on safety, adopt new safety policies, organises awareness activities etc., so that SAFE can reach to a common goal of bringing down the accident rate in our country and we can say "Accident bring tears and Safety brings cheers".



Road safety training programme





OVERVIEW OF THE AUTOMOBILE INDUSTRY

Industry Performance in 2011-12

Production

The cumulative production data for April-March 2012 shows production growth of 13.83 percent over same period last year. In March 2012 as compared to March 2011, production grew at a single digit rate of 6.83 percent. In 2011-12, the industry produced 20,366,432 vehicles of which share of two wheelers, passenger vehicles, three wheelers and commercial vehicles were 76 percent, 15 percent, 4 percent and 4 percent respectively.

Domestic Sales

The growth rate for overall domestic sales for 2011-12 was 12.24 percent amounting to 17,376,624 vehicles. In the month of only March 2012, domestic sales grew at a rate of 10.11 percent as compared to March 2011.

Passenger Vehicles segment grew at 4.66 percent during April-March 2012 over same period last year. Passenger Cars grew by 2.19 percent, Utility Vehicles grew by 16.47 percent and Vans by 10.01 percent during this period. In March 2012, domestic sales of Passenger Cars grew by 19.66 percent over the same month last year. Also, sales growth of total passenger vehicle in the month of March 2012 was at 20.59 percent (as compared to March 2011). For the first time in history car sales crossed two million in a financial year.

The overall Commercial Vehicles segment registered growth of 18.20 percent during April-March 2012 as compared to the same period last year. While Medium & Heavy Commercial Vehicles (M&HCVs) registered a growth of 7.94 percent, Light Commercial Vehicles grew at

27.36 percent. In only March 2012, commercial vehicle sales registered a growth of 14.82 percent over March 2011.

Three Wheelers sales recorded a decline of (-) 2.43 percent in April-March 2012 over same period last year. While Goods Carriers grew by 6.31 percent during April-March 2012, Passenger Carriers registered decline by (-) 4.50 percent. In March 2012, total Three Wheelers sales declined by (-) 9.11 percent over March 2011.

Total Two Wheelers sales registered a growth of 14.16 percent during April-March 2012. Mopeds, Motorcycles and Scooters grew by 11.39 percent, 12.01 percent and 24.55 percent respectively. If we compare sales figures of March 2012 to March 2011, the growth for two wheelers was 8.27 percent.

Exports

During April-March 2012, the industry exported 2,910,055 automobiles registering a growth of 25.44 percent. Passenger Vehicles registered growth at 14.18 percent in this period. Commercial Vehicles, Three Wheelers and Two Wheelers segments recorded growth of 25.15 percent, 34.41 percent and 27.13 percent respectively during April-March 2012. For the first time in history car exports crossed half a million in a financial year.

In March 2012 compared to March 2011, overall automobile exports registered a growth of 17.81 percent.

Automobile Production Trends

Category	(Number of Vehicles)					
	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
Passenger Cars	1,238,021	1,426,212	1,516,967	1,932,620	2,453,097	2,513,990
Utility Vehicles	222,495	246,038	219,498	272,883	313,142	372,648
Vans	84,707	105,333	102,128	151,908	216,533	236,890
Total Passenger Vehicles	1,545,223	1,777,583	1,838,593	2,357,411	2,982,772	3,123,528
M&HCVs	294,258	294,957	192,283	250,133	345,818	383,277
LCVs	225,724	254,049	224,587	317,423	414,917	528,297
Total Commercial Vehicles	519,982	549,006	416,870	567,556	760,735	911,574
Three Wheelers	556,126	500,660	497,020	619,194	799,553	877,711
Scooters	943,944	1,074,933	1,161,276	1,494,409	2,134,585	2,660,916
Motorcycles	7,112,281	6,503,532	6,798,118	8,444,857	10,510,189	12,006,950
Mopeds	379,987	430,827	436,219	571,070	704,575	785,753
Electric Two Wheelers	30,454	17,389	24,179	2,567	-	-
Total Two Wheelers	8,466,666	8,026,681	8,419,792	10,512,903	13,349,349	15,453,619
Grand Total	11,087,997	10,853,930	11,172,275	14,057,064	17,892,409	20,366,432

Automobile Domestic Sales Trends

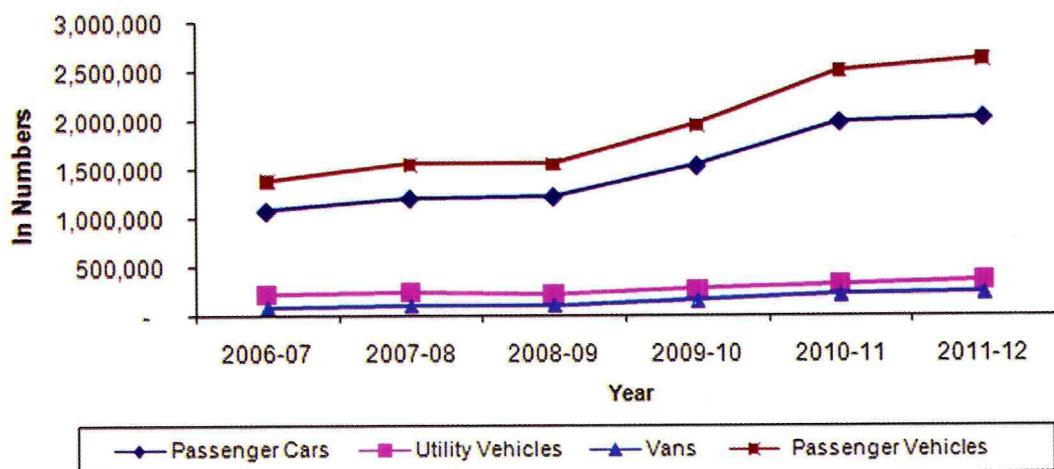
Category	(Number of Vehicles)					
	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
Passenger Cars	1,076,582	1,203,733	1,220,475	1,528,337	1,972,845	2,016,115
Utility Vehicles	220,306	245,284	225,621	272,740	315,123	367,012
Vans	83,091	100,865	106,607	150,256	213,574	234,945
Total Passenger Vehicles	1,379,979	1,549,882	1,552,703	1,951,333	2,501,542	2,618,072
M&HCVs	275,556	274,582	183,495	244,944	323,059	348,701
LCVs	192,209	215,912	200,699	287,777	361,846	460,831
Total Commercial Vehicles	467,765	490,494	384,194	532,721	684,905	809,532
Three Wheelers	403,910	364,781	349,727	440,392	526,024	513,251
Scooters	940,617	1,050,109	1,148,007	1,462,534	2,057,604	2,562,841
Motorcycles	6,547,195	5,768,342	5,831,953	7,341,122	9,013,888	10,096,062
Mopeds	354,760	413,759	431,214	564,584	697,418	776,866
Electric Two Wheelers	29,762	17,068	26,445	2,711	-	-
Total Two Wheelers	7,872,334	7,249,278	7,437,619	9,370,951	11,768,910	13,435,769
Grand Total	10,123,988	9,654,435	9,724,243	12,295,397	15,481,381	17,376,624

Automobile Exports Trends

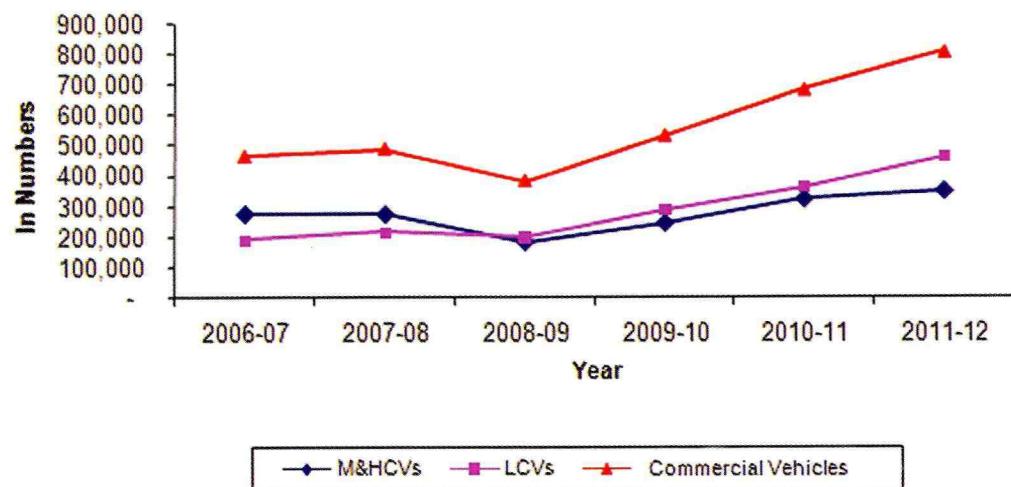
Category	(Number of Vehicles)					
	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
Passenger Cars	192,723	211,112	331,535	441,709	438,214	499,922
Utility Vehicles	4,399	6,283	3,034	2,823	3,746	5,189
Vans	1,330	1,006	1,160	1,613	2,366	2,207
Total Passenger Vehicles	198,452	218,401	335,729	446,145	444,326	507,318
M&HCVs	18,610	22,093	16,819	20,425	28,349	27,917
LCVs	30,927	36,901	25,806	24,584	45,694	64,746
Total Commercial Vehicles	49,537	58,994	42,625	45,009	74,043	92,663
Three Wheelers	143,896	141,225	148,066	173,214	269,968	362,876
Scooters	35,397	25,482	25,816	30,125	50,646	90,605
Motorcycles	545,592	776,007	971,018	1,102,978	1,474,678	1,847,517
Mopeds	38,655	18,224	7,300	6,905	6,295	9,076
Electric Two Wheelers	-	-	40	50	-	-
Total Two Wheelers	619,644	819,713	1,004,174	1,140,058	1,531,619	1,947,198
Grand Total	1,011,529	1,238,333	1,530,594	1,804,426	2,319,956	2,910,055

Domestic Sales Trends

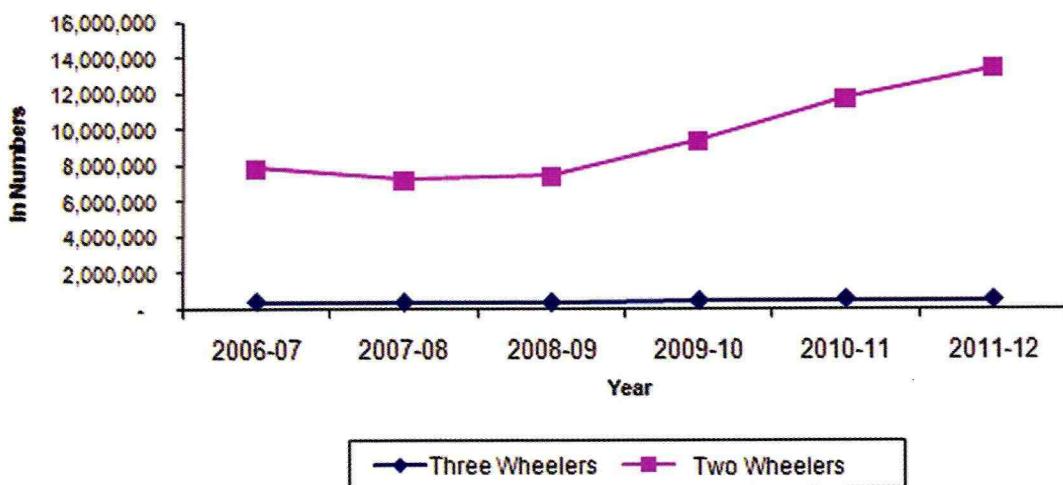
Domestic Sales Trends of Passenger Vehicles



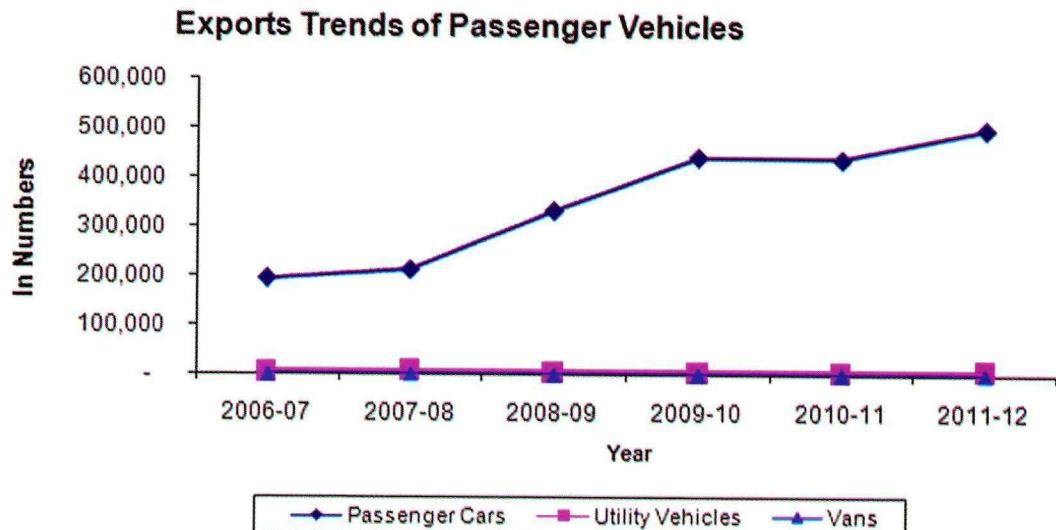
Domestic Sales Trends of Commercial Vehicles



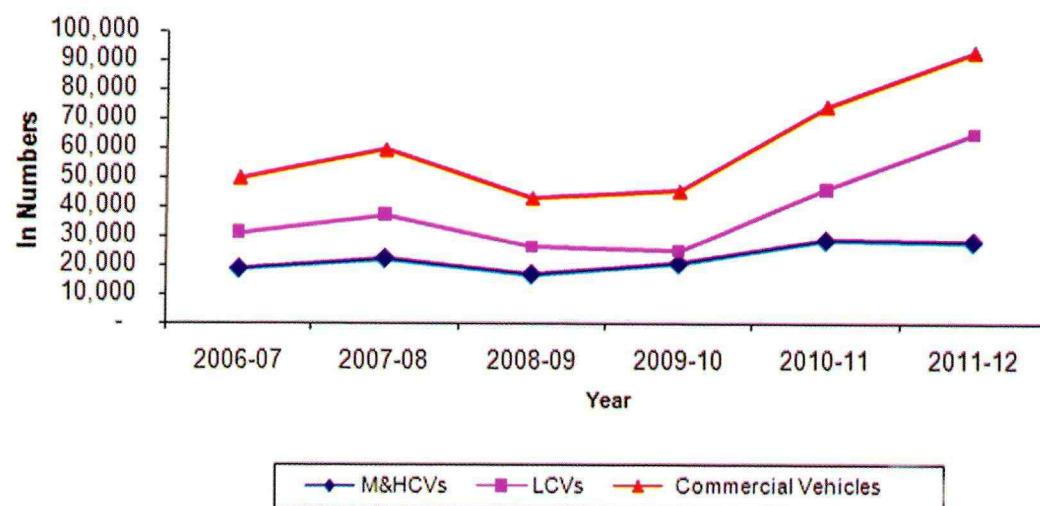
Domestic Sales Trends of Two & Three Wheelers



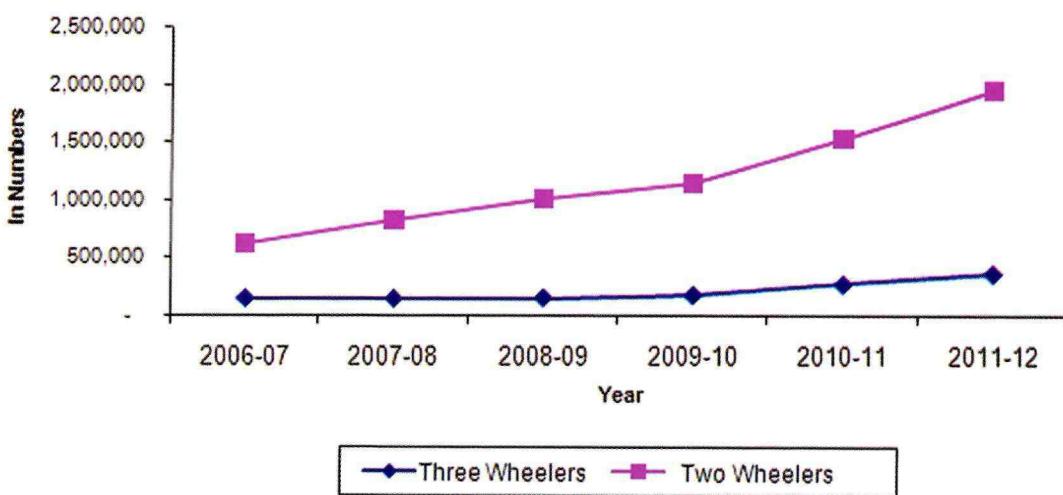
Automobile Exports Trends



Exports Trends of Commercial Vehicles



Exports Trends of Two & Three Wheelers



SIAM OFFICE BEARERS

SIAM Executive Committee 2011-2012

COMPANY	MEMBER	ALTERNATE MEMBER
Royal Enfield (Unit of Eicher Motors Ltd)	Mr S Sandilya <i>President</i>	Dr Venkatesh Padmanabhan
Toyota Kirloskar Motor Pvt Ltd	Mr Vikram Kirloskar <i>Vice President</i>	Mr Hiroshi Nakagawa
Ford India Pvt Ltd	Mr Michael Boneham <i>Treasurer</i>	Mr Kuljit Rana
Ashok Leyland Ltd	Mr Vinod K Dasari	Mr Rajive Saharia
Bajaj Auto Ltd	Mr Rajiv Bajaj	Mr K C Maheshwari
Cummins India Ltd	Mr Anant J Talaulicar	Mr Naresh M Narang
General Motors India Pvt Ltd	Mr Lowell Paddock	Mr P Balendran
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 Wadhera
Mahindra & Mahindra Ltd	Mr P N Shah	Mr Sachin Arollkar
Maruti Suzuki India Ltd	Mr S Nakanishi	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	
Tata Motors Ltd	Mr P M Telang <i>(Till June 2012)</i>	Mr Ravi Pisharody <i>(Till June 2012)</i>
	Mr Ravi Pisharody <i>(Since July 2012)</i>	Mr A S Puri <i>(Since July 2012)</i>
TVS Motor Company Ltd	Mr K N Radhakrishnan	
Volkswagen India Pvt Ltd	Dr John Chako	Mr Pankaj Gupta
VE Commercial India Pvt Ltd	Mr Siddhartha Lal	Mr Vinod Aggarwal

COUNCILS & GROUPS

SIAM Executive Committee 2011-2012

A. COUNCIL ON INTERNATIONAL BUSINESS



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

1. TRADE POLICY GROUP



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



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

2. INTERNATIONAL RELATIONS GROUP



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



Co-Chairman: Mr Rahul Bharti
General Manager-Corporate Planning & Govt. Affairs Relation
Maruti Suzuki India

3. EXPORTS GROUP



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



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

B. COUNCIL ON MARKET



Chairman: Mr Michael Boneham
Managing Director
Ford India



Co-Chairman: Mr Akash Passey
Managing Director
Volvo Buses India

1. VEHICLE CLASSIFICATION, SALES REPORTING & ANALYSIS



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



Co-Chairman: Mr N K Rattan
Operating Head-Sales & Marketing
Honda Motorcycle & Scooter India



Chairman: Mr Arvind Kumar Saxena
Director
Hyundai Motor India

2. TRADE FAIRS GROUP



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



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

3. LOGISTICS GROUP

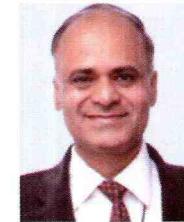


Co-Chairman: Mr Prem Verma
Chief Executive Officer, TML Distribution Company
(A Tata Motors Limited Company)

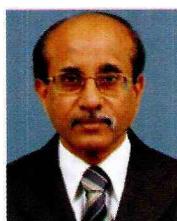


Chairman: Mr Pankaj Narula
Executive Director (Service)
Maruti Suzuki India

4. SERVICE HEADS GROUP



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



Chairman: Mr N Chandershekar
Special Director & CIO
Ashok Leyland

5. IT GROUP



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

C. COUNCIL ON ECONOMIC AFFAIRS



Chairman: Dr Abhay Firodia
Chairman
Force Motors



Co-Chairman: Mr Rajeev Kapoor
President & CEO
Fiat India



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



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



Chairman: Mr R Anandakrishnan,
Vice President (Business Planning & TQM)
TVS Motor Company



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



Chairman: Mr Sudhir Mehta
Director
Force Motors



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



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



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

1. SOURCING GROUP

2. ECONOMIC RESEARCH GROUP

3. TAXATION POLICY GROUP

4. TAXATION PROCEDURAL GROUP

5. FINANCE, LEASING & INSURANCE GROUP

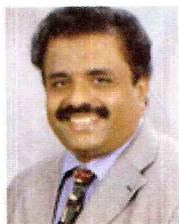


Chairman: Mr Ajay K Seth
Chief Financial Officer
Maruti Suzuki India



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

6. HUMAN CAPITAL GROUP



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



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

7. ANTI COUNTERFEITING GROUP



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



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

D. TECHNICAL COUNCIL



Chairman: Dr John Chacko
President & MD
Volkswagen India



Co-Chairman: Mr Vinod Dasari
Managing Director
Ashok Leyland

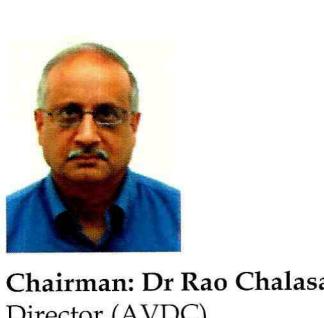


Chairman: Dr Rao Chalasani
Director (AVDC)
General Motors India



Co-Chairman: Mr A Sriniwas
Senior General Manager (R&D)
Mahindra & Mahindra

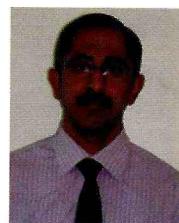
1. FRONTIER TECHNOLOGY GROUP, EV & HEV





Chairman: Capt. N S Mohan Ram
Adviser
TVS Motor

2. RECYCLING GROUP



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



Chairman: Mr Anant J Talaulicar
Chairman & MD
Cummins India

3. DIESEL IMAGE GROUP



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

4. GASEOUS FUELS GROUP



Chairman: Mr Jayendra Parikh
Advanced Engineering
Ashok Leyland

5. AUTO INFOTRONICS GROUP



Co-Chairman: Mr G K Binani
General Manager
Tata Motors



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

6. STYLING & DESIGN GROUP



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

E. NATIONAL & INTERNATIONAL REGULATION COUNCIL



Chairman: Mr P M Telang
Managing Director
Tata Motors



Co-Chairman: Mr I V Rao
Chief Operating Officer (Engineering)
Maruti Suzuki India

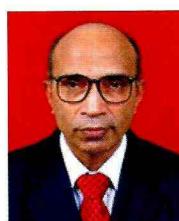


Chairman: Mr J K Deb
Vice President (Engineering & Development)
Fiat India

1. EMISSIONS & CONSERVATION GROUP



Co-Chairman: Dr Mathew Abraham
General Manager
Mahindra & Mahindra



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

2. CMVR & SAFETY REGULATIONS GROUP

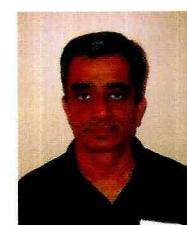


Co-Chairman: Mr R Kanitkar
Sr. Chief Engineer
Force Motors



Chairman: Mr Harjeet Singh
Vice President
Hero MotoCorp

3. TWO WHEELERS GROUP



Co-Chairman: Mr R Narasimhan
General Manager
Bajaj Auto



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

4. THREE WHEELERS GROUP



Chairman: Mr Z A Mujawar
Adviser
Mahindra & Mahindra

5. INTERNATIONAL HARMONIZATION GROUP



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

F. THREE WHEELERS CEO'S COUNCIL



Chairman: Mr Ravi Chopra
Chairman and Managing Director
Piaggio Vehicles

G. TWO WHEELERS CEO'S COUNCIL



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

H. PASSENGER CAR CEO'S COUNCIL



Chairman: Mr Karl Slym
President & MD
General Motors India

I. MUVS CEO'S COUNCIL



Chairman: Mr Shekhar Viswanathan
Deputy Managing Director
Toyota Kirloskar Motor

J. 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 (<i>Currently Chairman NMCC</i>)
1986 & 1987	Mr S L Bhatte	Hindustan Motors Ltd
1988/89 & 1989/90	Mr B De Souza*	Mahindra & Mahindra Ltd
1990/91 & 1991/92	Dr Abhay Firodia	Bajaj Tempo Ltd
1992-1993	Mr Subodh Bhargava	Eicher Motors Ltd
1993/94 & 1994/95	Mr Vinod L Doshi*	Premier Automobiles Ltd
1995/96 & 1996/97	Mr Brijmohan Lall	Hero MotoCorp 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	Royal Enfield (<i>A unit of Eicher Motors Ltd</i>)

* Since deceased

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. General Motors India Pvt Ltd
12. Greaves Cotton Ltd
13. HD Motor Company India Pvt Ltd*
14. Hero MotoCorp Ltd
15. Hindustan Motors Ltd
16. Honda Motorcycle & Scooter India Ltd
17. Honda Siel Cars India Ltd
18. Hyundai Motor India Ltd India
19. Yamaha Motor Pvt Ltd
20. International Cars & Motors Ltd
21. JCBL Ltd
22. Kamaz Vectra Motors Ltd
23. Kinetic Motor Company Ltd
24. LML Ltd
25. Mahindra & Mahindra Ltd
26. Mahindra 2 Wheelers Ltd
27. Mahindra Navistar Automobiles Ltd
28. Mahindra Reva Electric Vehicles Ltd
29. Maruti Suzuki India Ltd
30. Mercedes Benz India Pvt Ltd
31. Nissan Motor India Pvt 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. SkodaAuto 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

SIAM SECRETARIAT



Mr Amit Kumar

Mr Arindom Ghatak

Mr Arnab Chakraborti

Mr Atanu Ganguli

Mr B K Dutta

Mr Bhisham Prasad Rai

Mr Dhiraj V Chatap

Mr Dikshant Negi

Mr Dinesh Patnaik

Mr Jitendra Rai

Mr K K Gandhi

Mr Kartike Karwal*

Ms Manju Dhamija

Mr Manoj Mohapatra*

Ms Meenakshi Kukreja

Mr Noel Alexander Peters*

Mr Pankaj Karn

Mr Philip Skaria

Ms Ragmani Shukla

Mr Raju Kamat

Mr Ramesh P Iyer

Ms Rinki Verma*

Ms Ritika Changia*

Ms Ruby Ganguly

Mr Saurabh Rohilla

Mr Sugato Sen

Ms Supriya Sinha

Mr Sushil Kumar

Mr Tribhuvan Rai

Mr V K Pandey

Mr Vishnu Mathur

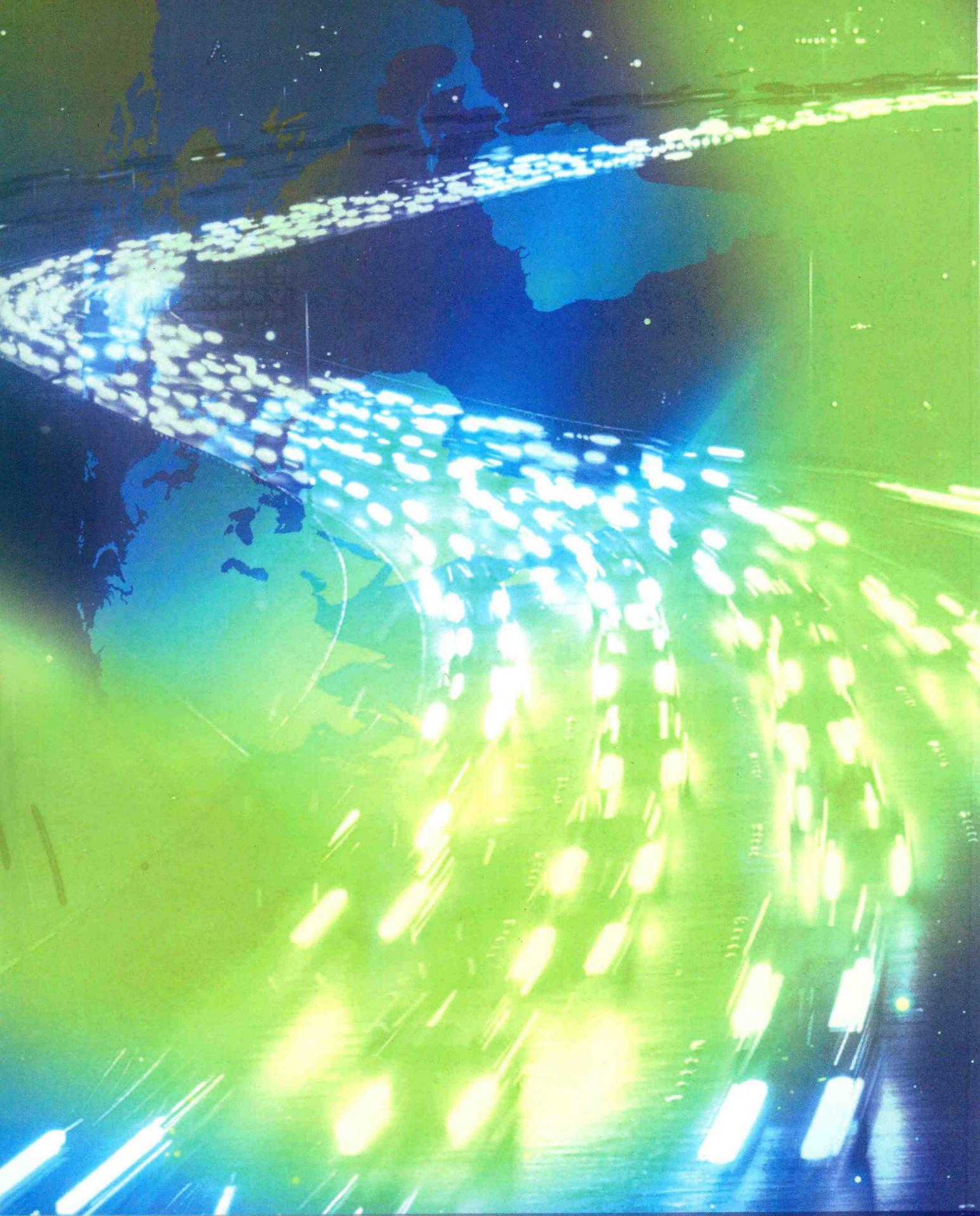
*For part of the year 2012

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
Bureau of Energy Efficiency
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
Global Automotive Research Center
Indian Auto LPG Coalition
Integrated Research and Action for Development
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
Petroleum Conservation and Research Association
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
University of Petroleum and Energy Studies, Dehradun
Vehicle Research & Development Establishment
Western India Automobile Association

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



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