

SIAM

Society of Indian Automobile Manufacturers

**Third
Annual
Report**

2000 - 2001

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**Third Annual Report
2000 - 2001**

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PRESIDENT'S MESSAGE

Retrospection into the last year's activities reveals that the year 2000-2001 has indeed been eventful. It is time again to review the trends of growth, initiatives taken and assess our performance against the targets laid down last year.

Globally the automotive industry is witnessing a recessionary trend and the Indian Automotive Industry is no exception. The current status of the Indian automobile industry is disconcerting. A poor investment scenario and low agricultural output have adversely affected the pace of economic growth in the last fiscal year. The forecast for GDP growth has been lowered from more than 7% to around 6 %.

The economic slow down, increasing oil prices, increase and rationalisation of sales tax to higher uniform rate in most states and technology upgrades to meet tighter emission norms have all cumulatively impacted a slowdown in the Automobile industry.

However I am quite hopeful that with an expected turnaround of the economy towards the end of this year, the Automotive industry may be able to come out of the recessionary trends.

Through its continuous dialogue with all stakeholders SIAM has gained recognition as a responsible representative body and it would not be an exaggeration to say that it is being increasingly viewed as the **Window to the Indian Automobile Industry** not only by the Government and other organisations in India but also by foreign Governments and International organisations.

SIAM has been working in unison with various Ministries and has been providing inputs for formulation and implementation of policies concerning the Automotive Industry. Almost **all** the recommendations made by SIAM have been incorporated in the Union Budget 2001-2002 and the EXIM Policy. Through its continuous dialogue with the Government, SIAM has been able to drive home the fact that Automobile Industry is an important driver of the economy. This was reaffirmed when Automobile Industry was one of the few industries consulted by the Finance Minister for policy prescription to revive the economy.

Safety and Environment have always been the top priority for SIAM. The Society has been striving to address all issues related to vehicular emission and safety of the road user.

The announcement of emission warranty for all categories of vehicles is reflective of Industry's pro-activeness in this direction.

SIAM has been emphasising the importance of regular Inspection & Maintenance to effectively tackle pollution from the large population of in-use vehicles. As an extension of the drive started by SIAM in Delhi in 1999, several I&M camps in major cities were organised last year. These initiatives have triggered an ongoing process towards ensuring a better environment and safer roads in the form of greater awareness and proactive role of all the stakeholders.

SIAM has initiated a Road Safety Action Plan aimed towards creating awareness and bringing



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PRESIDENT'S MESSAGE

about attitudinal change among road users through various programmes. In addition to this, the automobile industry has taken upon itself the task of harmonising the safety standards with the international standards and is evolving a Road Map for Safety Regulations for Automobiles. Soon the industry should be able to bridge the gap between the standards followed in India vis-à-vis those followed internationally.

The use of alternate fuels in the transportation sector is assuming greater importance worldwide. It is remarkable that the Indian industry has been able to keep pace in developing vehicles using alternate fuels through greater thrust on technology upgradation and R&D. SIAM organised two conferences, one of which was attended by well known names in the field from all over the world. The objective of these conferences was to look at strategies for sustainable development of alternate fuel for vehicular use. I am positive that the Task Force on Alternate Energy Driven Vehicles formed by SIAM would play a key role in charting out the future directions in this area.

The advent of democratic capitalism accompanied by the digital revolution has led to the integration of the world economy commonly referred to as "**Globalisation**". With production controls obliterating fast, investment has gained greater sanctity and the Trans National Corporations are supplementing the indigenous efforts. In this new Quantitative Restriction (QR) less trading regime, "Globalisation and its Impact – Focus: Asian Automobile Industry" is an appropriate theme for our Annual Convention this year.

In the emerging Globalised scenario, the Indian industry is interested in building a lasting relationship with other economies. All developing countries are in for reforms and are in some phase or the other of the transition process to overcome the teething problems brought about by Globalisation. It would be useful to share experiences. I am sure that this convention would provide a platform for a stronger association between Indian industry and our counterparts in other countries.

Finally, I would like to acknowledge the support extended to me by all members during my tenure as President, SIAM. I welcome my successor and wish him success in his endeavour to enhance the industry's role as a responsible citizen.

I also express my sincere thanks to the various authorities in the Government, related Institutions and other Industry Associations for their whole-hearted co-operation during my tenure as President of this body.



Venu Srinivasan
President

5th September 2001
New Delhi

ABOUT SIAM

SIAM is an apex industry body representing 35 leading vehicle and vehicular engine manufacturers. Although SIAM's principal focus remains on technology with emphasis on environmental and safety aspects, it is committed to playing a proactive role on all issues that would promote sustainable development of the Automotive Industry.

SIAM is an important channel of communication for the Automobile Industry with the Government, national and international organisations. Dissemination of information is an integral part of SIAM's activities, which it does through various publications, reports on production and sales, organising seminars and conferences. SIAM also organises, biennially, the Auto Expo series of Trade Fairs in co-operation with the Confederation of Indian Industry (CII) and Automotive Component Manufacturers Association of India (ACMA).

SIAM has been striving to keep pace with the socio-economic and technological changes shaping the Automobile industry, while trying to fulfil its endeavour to be a catalyst in the development of a stronger Automobile Industry in India.

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IN VIEW OF THE CHALLENGES OF THE NEW WORLD TRADE REGIME, SIAM INCREASED ITS FOCUS ON INTERACTION WITH THE VARIOUS MINISTRIES CONCERNED WITH ECONOMIC POLICIES AFFECTING THE AUTOMOBILE INDUSTRY.

SIAM INITIATIVES & EVENTS - HIGHLIGHTS

The year 2000 – 2001 has been crucial for the Automobile industry. There were challenges and opportunities, which the Automobile industry has been successful in meeting. Some major issues were the removal of Quantitative Restrictions on Automobile imports for the first time, introduction of tighter emission norms in several parts of the country, Supreme Court directives on mandating the use of CNG driven vehicles in Delhi, recognition of LPG as Automotive Fuel, and so on.

ECONOMIC ISSUES

In view of the challenges of the new world trade regime, SIAM increased its focus on interaction with the various Ministries concerned with economic policies affecting the Automobile industry.

Budget 2001-2002

SIAM welcomed the Budget, as it is growth oriented and spells out reforms in the areas of labour legislation and gives thrust on infrastructure investment. It is quite heartening that almost all the major issues raised by SIAM were considered favourably in the budget. However, there are still several issues pending to be sorted out.

EXIM Policy: Conditions of Import for new/used vehicles

The conditions of Import for new as well as used/ second hand vehicles, announced by DGFT in their notification as a part of the EXIM Policy announced on 1st April 2001, has been in line with industry expectations.

Meeting with the Finance Minister

The activities / initiatives taken by SIAM have been able to drive home the fact that Automobile Industry is a key driver of the National Economy. This is evident from the fact that Automobile Industry was one of the key industry sectors invited by the Finance Minister to understand the problems and prescribe policy measures to revive the economic growth in the country. The two areas identified for immediate consideration are - Export promotion measures and Domestic Auto Financing Facilities, on which SIAM has submitted its recommendations to the Government after detailed deliberations in the Core Groups constituted for this purpose. SIAM members had several rounds of interaction with representatives of Indian Banks' Association for strengthening Auto Financing infrastructure.

Common Classification Code

Recognising SIAM as the representative body for the Automobile Industry the Ministries of Finance and Commerce are consulting SIAM on the proposed common classification code for vehicles and auto components to be used for Customs, Central Excise, EXIM Policy and Statistics purposes. SIAM has submitted its views to the Government.

Vehicle Classification

The Task Force on Vehicle Classification under the Chairmanship of Mr Abhay Firodia has given its recommendation on the new format for vehicle classification to be adopted for SIAM statistical reports. This new format is in line with European Economic Cooperation (EEC) classification. Within each segment, sub-segments to reflect the Indian scenario have been incorporated.

Introduction of VAT

SIAM has been interacting with experts in order to prepare the industry for a smooth transition to Value Added Tax system to be implemented from 1st April 2002. Based on the discussions in a recent meeting with Dr Mahesh C Purohit of National Institute of Public Finance & Policy at Mumbai, a Committee on VAT Implementation has been constituted. This Committee is to prepare a base paper on the concerns of the Automobile industry to be submitted to Central and State Governments before the VAT legislation is finalised.

Interaction with Tariff Advisory Committee

SIAM has been actively involved in discussions with the Tariff Advisory Committee and has been giving recommendations on policies regarding insurance premium for all types of vehicles.

Recommendations regarding Rules of Origin

SIAM has interacted with various Departments and Ministries on crucial issues like Rules of Origin – Non Preferential Arrangement as relevant to the Automobile Industry.

With a view to address issues like anti dumping and safeguard measures, regional trading arrangement and also the preferential trading arrangement, etc. SIAM has suggested that India should adopt the following two criteria:

- (1) Change in Tariff Heading (CTH) at six digit level plus value addition (at least 40% of FOB Value) and
- (2) For assembly purposes - Substantial Transformation (ST) plus value addition (at least 40% of FOB Value).

Joint CII-SIAM mission to Asian countries

SIAM organised a Joint CII-SIAM mission to Asian countries including Malaysia, Japan, Korea and China to study the Automobile market in view of the challenges envisaged in the new / free trading scenario under the WTO regime. It was observed that all these countries protect their domestic industry from unfair imports in some form or the other.

International delegations

SIAM has also been able to establish its identity as a window to Indian Automobile Industry at various International fora. Several International delegations including government delegations from Iran and China have interacted with SIAM on issues of mutual interest.

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ORDER TO
PREPARE THE
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IMPLEMENTED
FROM 1ST APRIL
2002.

SIAM
ANNOUNCED ITS
OFFER TO
PROVIDE
EMISSION
WARRANTY
ACROSS ALL
CATEGORIES OF
VEHICLES –
PASSENGER
CARS, MULTI
UTILITY
VEHICLES,
COMMERCIAL
VEHICLES, TWO-
WHEELERS AND
THREE-
WHEELERS IN
FEBRUARY 2001.

Vehicular Emissions

Future Emissions Norms

SIAM announced the Industry Road Map for future emissions norms in India in early 2000 to bridge the gap between India and Europe from eight years at Euro I level to 1-2 years at Euro IV level. The Committee of Secretaries of Government of India formed an Inter-Ministerial Task Force under the Chairmanship of Chairman, Central Pollution Control Board and having representatives from Ministry of Petroleum & Natural Gas, Ministry of Environment & Forest, Ministry of Road Transport & Highways, Bureau of Indian Standards and Society of Indian Automobile Manufacturers.

The Inter-Ministerial Task Force has given its report on March 31, 2001. It has recommended that

- Bharat Stage II vehicular emission standards and fuel specifications may be implemented throughout the country from April 2005. In respect of mega cities Delhi, Mumbai, Kolkata, Chennai, Bangalore, Hyderabad and Ahmedabad, Euro III equivalent emission norms and Euro III equivalent fuel may be introduced from April 2005.
- Time frames for introduction of Euro III equivalent norms throughout the country may be decided within a year's time.
- Implementation of Euro IV equivalent norms could be deliberated in detail only after such norms are finalised in Europe and information in regard to technological requirements are established.

Emission Warranty

SIAM announced its offer to provide Emission Warranty across all categories of vehicles – Passenger Cars, Multi Utility Vehicles, Commercial Vehicles, Two-Wheelers and Three-Wheelers in February 2001.

Emission warranty will be valid for all new Passenger Cars, MUVs, meeting Bharat Stage II emissions norms and Two-Wheelers & Three-Wheelers meeting India 2000 norms from July 1, 2001. For Commercial Vehicles, this would be applicable from the date of implementation of Bharat Stage II norms. Emission Warranty will be based on in-use vehicle emission norms.

Emission warranty will be in addition to and will run parallel with product warranty given by individual manufacturers. The warranty period of each vehicle category recommended by SIAM:

Two Wheelers	- 30,000 kms or 3 years whichever occurs earlier
Three Wheelers	- 30,000 kms or 1 year whichever occurs earlier
Passenger Cars	- 80,000 kms or 3 years whichever occurs earlier
MUVs	- 80,000 kms or 3 years whichever occurs earlier
Commercial Vehicles	- 80,000 kms or 1 year whichever occurs earlier

Conferences & Seminars

International conference and exposition on Inspection and Maintenance

SIAM and SAFE organised a two-day International conference and exposition on Inspection and Maintenance on December 4-5, 2000 at India Habitat Centre, New Delhi. Leading environmental

experts from across the globe gathered and shared their experiences regarding Inspection and Maintenance of vehicles.

Outcome of the Conference:

- Centralised systems are better than decentralised ones – but must avoid long travelling distances and long waiting time for vehicle owners.
- I & M system must apply to all vehicles
 - personal transport and public transport vehicles;
 - periodicity of check to depend on vehicle kilometres travelled.
- Setting up of an informal Committee for Upgradation of Emission Testing Centres commonly known as PUC Centres, comprising of members from various State Governments and SIAM, to formulate procedures for upgradation of the existing Centres.

Upgradation of Emission Testing Centres

Based on inputs from this informal Committee, SIAM has developed a computerised system for upgradation of Emission Testing Centres for petrol vehicles. This upgraded Emission Testing system works with modern emission test equipment connected with a computer. A web camera is also connected to the system to capture the photograph of the registration number of the vehicle, hence minimising human intervention and misuse.

SIAM has already setup two computerised Emissions Testing Centers each, as demonstration projects, in Kolkata, Bangalore and Delhi.

International Conference & Exposition on Sustainable Development of Alternative Energy Driven Vehicles Programme

In April this year SIAM and CPCB jointly organised a two day International Conference & Exposition on Sustainable Development of Alternative Energy Driven Vehicles Programme.

Experts from all over the world and stakeholders concluded that in the current Indian context, CNG and LPG are the most viable options, amongst the alternate energy driven vehicles.

Outcome of the Conference:

- **A Task Force on Alternate Energy Driven Vehicles** was formed to prepare a perspective plan, both short-term and long-term in the light of the following:
 - Assessment of infrastructure requirements
 - Assessment of appropriate application of specific Alternative Energy Driven Vehicles Programme in the principle cities of India – Ahmedabad, Bangalore, Chennai, Delhi, Hyderabad, Kolkata, and Mumbai.
 - Fiscal instruments to promote the programme
- National Alternative Fuels Training Consortium of USA offered support for the development of training infrastructure in India to facilitate smooth introduction of new technologies. SIAM is in dialogue with them.
- SIAM in association with West Bengal Pollution Control Board has already organised a follow-up Seminar in Kolkata and hopes to spread the programme in other cities as well.

A TASK FORCE
ON
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WITH AN OBJECTIVE TO HIGHLIGHT THE ESTABLISHED FACT THAT I&M IS THE KEY TO A COST EFFECTIVE WAY OF REDUCING VEHICULAR POLLUTION, SIAM HAS BEEN ORGANIZING SERIES OF I&M CLINICS FOR VARIOUS CATEGORIES OF VEHICLES IN DIFFERENT PARTS OF COUNTRY.

Inspection & Maintenance Clinics

With an objective to highlight the established fact that I&M is the key to a cost effective way of reducing vehicular pollution, SIAM has been organizing series of I&M clinics for various categories of vehicles in different parts of country. SIAM has conducted 8 clinics from October 2000 to May 2001 in Chennai, Kolkata, Hyderabad, Bangalore, Mumbai and Delhi covering more than 20,000 vehicles.

In addition to the I&M camps, SIAM organised a five-day refresher training programme for about 275 owners and technicians of Emission Testing Centres in Hyderabad, as an awareness campaign.

Partnership With International Organisations

SIAM is working closely with international organisations like USAEP, USEPA, USAID, British High Commission, GTZ and others to study the practices followed internationally to reduce vehicular pollution. Under their Expert Exchange Programme, USAEP sponsored the visit of a SIAM team to USA to understand the practices followed for in-use vehicle inspection.

During the year SIAM undertook a sponsored study for The Louis Berger Group of USA, funded by USAID, for Vehicle Technology Assessment in Hyderabad. Based on the findings of the study, SIAM and local stake-holders are now working out plans to reduce vehicular emissions in the city and design a demonstration project that can subsequently be replicated in other cities.

Safety Regulations

Road Map

As one more proactive step, SIAM has embarked upon laying down a Road Map for Safety Standards related to Automobiles. The Safety Road Map would give a blue print for development and adoption of safety regulations over the next decade. The objective of the Road Map is to bridge the gap between international and Indian safety regulations and to promote safer vehicles on Indian roads. The Road Map is being currently deliberated upon by the CMVR, Safety & Regulations Committee of SIAM and would be finalised very soon.

Bus Body Code

Under the sub committee of CMVR - Technical Standing Committee of Bus Body Design and Approval, of the Ministry of Road Transport & Highways, SIAM has actively participated and supported the development of the 'Code of Practice of Bus Body Design and Approval.' The Code meets the long felt need to improve the standard of bus body building in the country, particularly with respect to comfort and safety. The Code has been ratified by CMVR-Technical Standing Committee and has been submitted to the Government for implementation. SIAM, taking a proactive step, is also suggesting the approach required for successful implementation.

As a next step in the direction of upgrading the body structure of Commercial Vehicles, SIAM is planning to prepare a Code for Standardisation of truck bodies.

Road Safety

The last two decades have witnessed rapid strides in India's industrial development, especially in the metropolitan towns. The high rise buildings, the shopping malls, the sleek fly-overs are a sharp contrast to much of the Indian countryside. However, this quick growth has brought with it the impending problems of urbanisation – and as people go about their lives at high speeds, their safety and that of other road users has become an issue of primary concern. In India, we have a variety of traffic on the road – from the most primary modes of transport to the most sophisticated, from pushcarts, two-wheelers to the four-wheelers to multi-axled vehicles – all jostling for space, all wanting to get ahead! As a result, the number of fatalities on the roads is increasing day by day. At an average, about 60-70 thousand people are killed in road accidents in India every year, with more than 3 lakh accidents being reported in 1998. The total economic loss to society on account of these accidents is estimated to be over Rs. 5000 crores.

In view of the above, SIAM has identified the following objectives for its Road Safety Action Plan

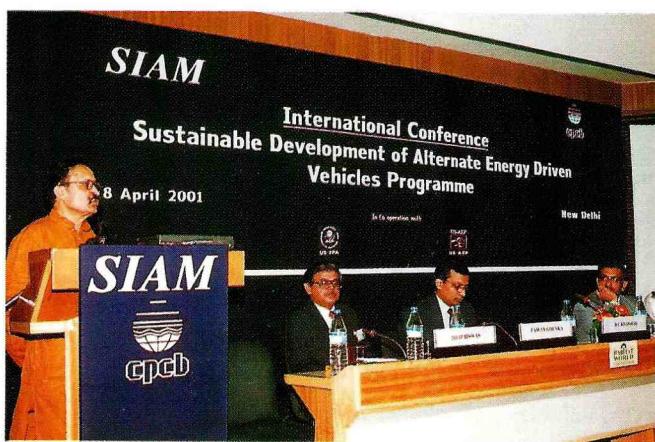
- To spread awareness about road safety and bring about an attitudinal changes in road users through different media.
- To initiate a series of traffic education and enforcement activities with the active participation of public especially school children.
- Organise Road Safety activities in a balanced and sustained manner with the assistance and participation of various agencies and the public.

The initiatives on this front include the following:

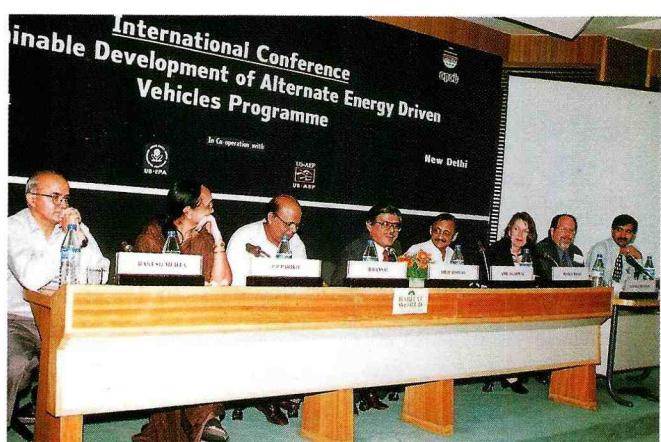
- SIAM organised a two-day Road Safety training programme in association with Institute of Road Traffic Education (IRTE) on 7th – 8th April 2001 at Chennai with 100 student volunteers from National Service Scheme (NSS).
- Along with the training programme a seminar on Accidents and Prevention was organised at Chennai on April 8, 2001.
- During the same time, to impart road safety education, SIAM and SAFE in association with Transport Department, Government of Tamil Nadu launched a month long road safety campaign for two wheelers in Chennai. During this month long campaign, 100 student volunteers were positioned at different petrol pumps in the city and directly interacted with the users of two wheelers on safety tips.
- SIAM conducted a one day training programme in Delhi for Transport In-charges of different schools in association with Institute of Driving Training & Research (IDTR) on 10th May 2001.
- SIAM participated in an awareness programme on traffic rules and management for auto rickshaw, bus and truck operators on 17th June 2001 at Kolkata. SIAM organised a small exposition and made a video presentation on Automobile Industry's perspectives on Road Safety and Vehicular Pollution.

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FROM
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TWO-WHEELERS
TO THE FOUR-
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MULTI-AXLED
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IMPORTANT EVENTS



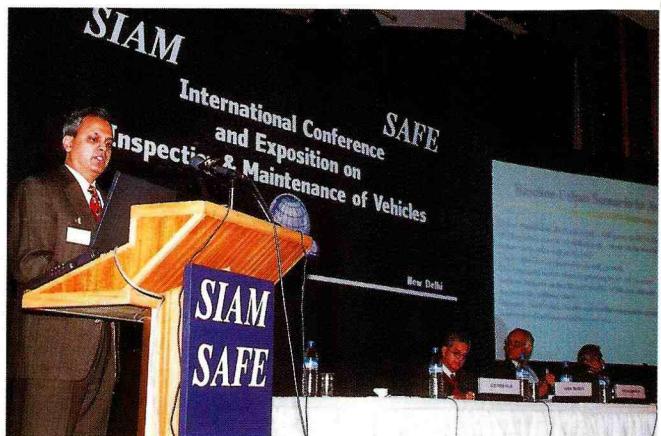
Major General (retd.) Mr B C Khanduri, Minister for Road Transport & Highways addressing the gathering at the International Conference on Sustainable Development of Alternate Energy Driven Vehicles Programme on 17th April 2001



Panel Discussion at the International Conference on Sustainable Development of Alternate Energy Driven Vehicles Programme on 18th April 2001



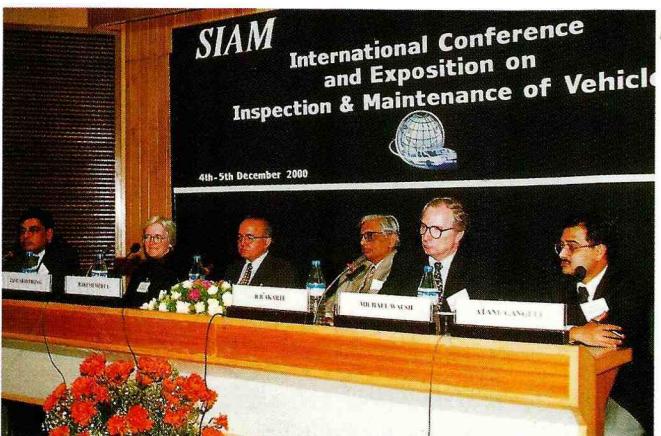
School students on a visit to a member's manufacturing plant. The visit was organised by SIAM.



Mr Jitu Shah, World Bank, at the International Conference and Exposition on Inspection & Maintenance of Vehicles on 4th-5th December, 2000.



SIAM with the USEPA team, in Chicago during the Green Fleet conference under USAEP Expert Exchange Programme.

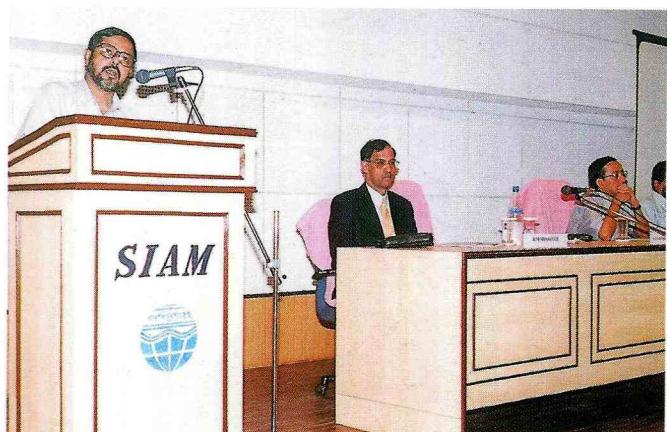


USEPA team members, alongwith Mr Michael Walsh, at the International Conference and Exposition on Inspection & Maintenance of Vehicles.

IMPORTANT EVENTS



At the inauguration of the I&M Clinic at Kolkata in November, 2000. From the left: Mr Subhash Chakraborty, Minister of Transport, Govt. of West Bengal and Mr Manabendra Mukherjee, Minister of Environment, Govt. of West Bengal.



At the Alternate Fuel Seminar in Kolkata: From the left: Mr Manbendra Mukherjee, Minister of Environment, Govt. of West Bengal, Mr R Seshasayee, Vice President, SIAM and Dr K K Bagchi, Chairman, WBPCB.



At the I & M Camp for government vehicles at Hyderabad. First and second from the left: Mr. B V Mohan Reddy, Transport Minister, Govt. of Andhra Pradesh, Mr Devender Goud, Minister of Home, Govt. of Andhra Pradesh.



SIAM team visits the Honda factory (two-wheeler) at Hamamatsu in Japan.

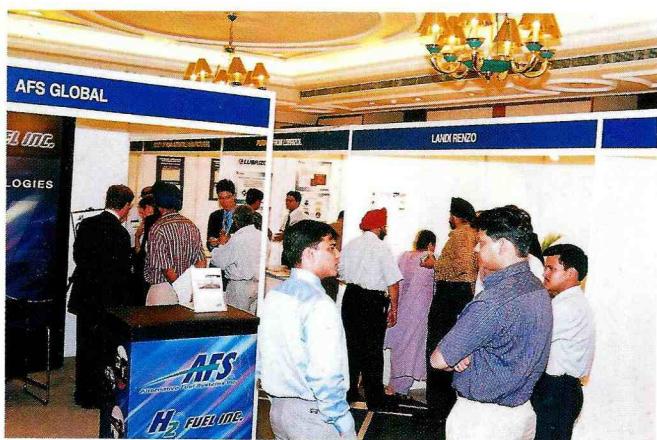


SIAM delegation during the Prime Minister's visit to Malaysia.



Prof. Mahesh C Purohit, NIPFP making a presentation on VAT in Mumbai.

IMPORTANT EVENTS



Visitors at the exposition during the Alternate Fuel Conference in New Delhi.



Mr C R Sagir Ahmed, Transport Minister, Government of Karnataka addressing the gathering at the inaugural function of the Free I&M Camp for two-wheelers organised from 9th-11th January, 2001 at Bangalore.



Free I&M Camp organised from 18th-21st May, 2001 in action at Mumbai.



Mr P Ramulu, IPS, Commissioner of Police, Hyderabad, addressing the gathering at the inaugural function of Refresher Training for Owners & Technicians of Pollution Testing Centres at Hyderabad.



Mr Parvez Hashmi, Minister of Transport, Land & Building, Government of NCT of Delhi at the Inauguration of the Computerised PUC Centre at New Delhi on 8th August 2001.



Inauguration of the Computerised Emission Test Centre at Bangalore on 24th July, 2001 by Mr C R Sagir Ahmed, Transport Minister, Govt. of Karnataka.

IMPORTANT EVENTS



Mr S Rajarethnam, Environment Secretary at the inauguration of the three-wheeler I&M camp with Mrs Sheela Rani Chunkath, Chairperson, TNPCB and Mr Venu Srinivasan, President, SIAM.



Mr M F Farooqui, Secretary, Public and Rehabilitation Department, Govt. of Tamil Nadu at the inauguration of the government vehicle I&M camp in Chennai.



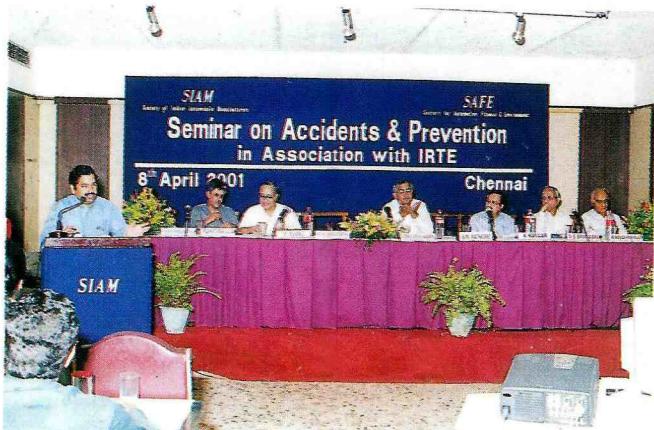
At the inauguration of Commercial Vehicle I&M Camp Mr Palanisamy, Minister for Pollution Control & Youth Affairs, Govt. of Tamil Nadu alongwith Mrs Sheela Rani Chunkath, Chairperson, TNPCB.



Vehicles line-up at the Free I&M Clinic for commercial vehicles at Chennai.



Road Safety Awareness Campaign - Students' rally at Chennai



At the Seminar on Accidents & Prevention organised in association with IRTE at Chennai: Mr P R Shampath, Joint Transport Commissioner delivering his address.

OVERVIEW OF PERFORMANCE

The Indian Automobile Industry: 2000-2001

The economic slowdown in India has also affected the Indian Automobile industry. During the year 2000-2001 it recorded a decline of 2% and 3% over the last year in terms of production and sales. This is in sharp contrast to the robust 15% and 16% growth rates witnessed in 1999-2000 for production and sales.

Due to very low level of investments, especially in the infrastructure sector, the sales of commercial vehicles declined by 15%. Within the commercial vehicles segment, while medium and heavy vehicle sales declined by 23%, the sales of light commercial vehicles declined by only 1%. Sales of passenger cars also declined by 8%. Although there was a 4% growth in sales of multi-utility vehicles, the overall decline in four wheeler sales was 8%.

Sales of two wheelers this year also declined marginally by 2%. However, within the two wheelers segment, motorcycle sales grew by around 20%. This high growth of motorcycle sales may be partially attributable to the market shift from scooters (growth rate -29%) to motorcycles (growth rate +20%). Three wheeler sales also grew by 6%.

The only area where the industry has done well is the export front. Last year saw an export growth of 20% from the previous year. Both commercial vehicle (39%) and two wheeler (34%) exports grew quite significantly. However, passenger car (-2%) and multi-utility vehicle (-20%) segments saw declining exports during the same period.

Some of the factors contributing to the poor performance of the industry are low level of investments in the public and private sectors, inadequate infrastructure development, lack of business confidence, high cost & non-availability of capital, overall recession in the economy and the resultant slow down in the industrial production.

DURING THE
YEAR 2000-
2001 INDIAN
AUTOMOBILE
INDUSTRY
RECORDED A
DECLINE OF
2% AND 3%
OVER THE
LAST YEAR IN
TERMS OF
PRODUCTION
AND SALES.

OVERVIEW OF PERFORMANCE

AUTOMOBILE PRODUCTION TREND

CATEGORY	In Numbers						
	1995-96	1996-97	1997-98	1998-99	1999-2000	2000-2001	2001-2002 Apr-July
M & HCVs	129651	155696	95854	80528	112308	88210	23621
LCVs	87786	84855	65040	55363	61213	63869	15022
Total CVs	217437	240551	160894	135891	173521	152079	38643
Cars	348240	411145	401002	390709	577243	504654	185006
MUVs	106251	134583	134653	113328	124307	125938	39678
Total Cars & MUVs	454491	545728	535655	504037	701550	630592	224684
Total Four Wheelers	671928	786279	696549	639928	875071	782671	263327
Scooters	1224889	1312920	1279467	1315055	1259423	879707	310461
Motorcycles	809087	988233	1125958	1387286	1794078	2183785	844383
Mopeds	622041	678074	667242	672167	724510	694974	147114
Total Two Wheelers	2656017	2979227	3072667	3374508	3778011	3758466	1301958
Three Wheelers	176413	221619	234867	209033	205543	203234	59500
Grand Total	3504358	3987125	4004083	4223469	4858625	4744371	1624785

AUTOMOBILE DOMESTIC SALES TREND

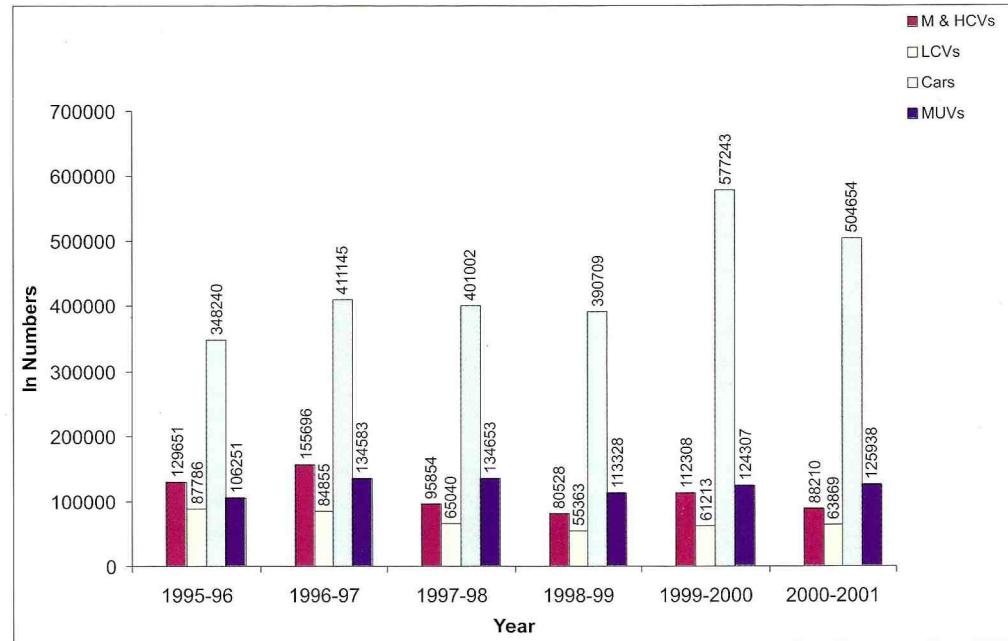
CATEGORY	In Numbers						
	1995-96	1996-97	1997-98	1998-99	1999-2000	2000-2001	2001-2002 Apr-July
M & HCVs	119781	144511	88259	79124	106106	82071	22189
LCVs	80302	77165	55555	50698	55301	54602	12594
Total CVs	200083	221676	143814	129822	161407	136673	34783
Cars	316489	374144	388015	384483	615544	567734	183225
MUVs	101273	132157	130014	109082	118274	122831	37048
Total Cars & MUVs	417762	506301	518029	493565	733818	690565	220273
Total Four Wheelers	617845	727977	661843	623387	895225	827238	255056
Scooters	1199543	1274815	1232432	1297115	1233781	876252	306303
Motorcycles	760931	928329	1085976	1360196	1761439	2114693	804118
Mopeds	583843	635617	598943	646114	698321	643461	142408
Total Two Wheelers	2544317	2838761	2917351	3303425	3693541	3634406	1252829
Three Wheelers	144841	198463	215138	189082	186850	181899	60184
Grand Total	3307003	3765201	3794332	4115894	4775616	4643543	1568069

AUTOMOBILE EXPORTS TREND

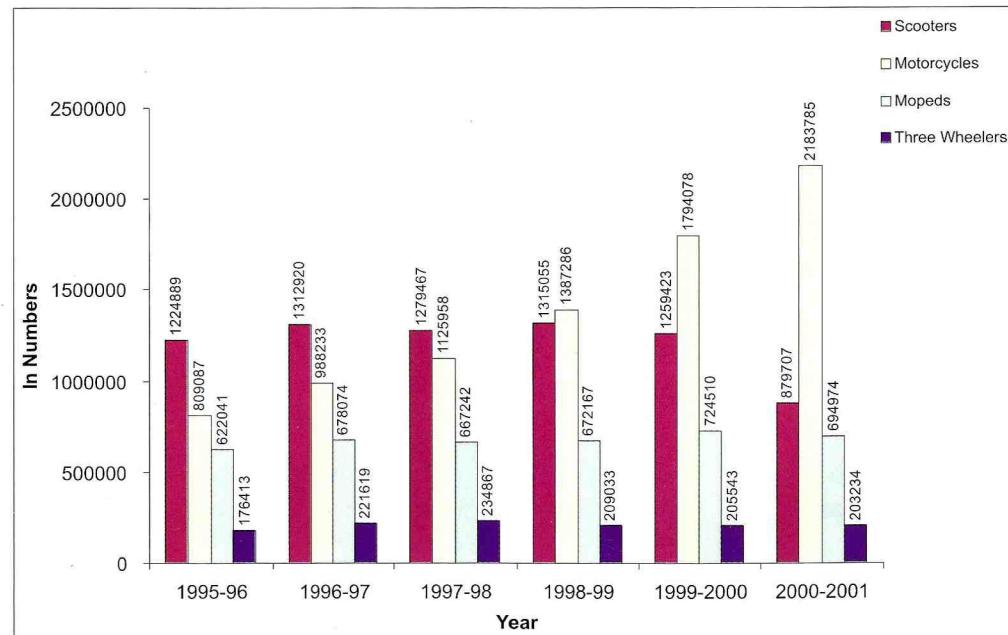
CATEGORY	In Numbers						
	1995-96	1996-97	1997-98	1998-99	1999-2000	2000-2001	2001-2002 Apr-July
M & HCVs	8560	6606	5872	4544	5089	5517	651
LCVs	6995	7230	8212	5564	4823	8262	1955
TOTAL CVs	15555	13836	14084	10108	9912	13779	2606
Cars	28851	37161	29705	25468	23271	22913	13251
MUVs	2987	2484	3288	2654	5148	4122	843
Total Cars & MUVs	31838	39645	32993	28122	28419	27035	14094
Total Four Wheelers	47393	53481	47077	38230	38331	40814	16700
Scooters	23106	26236	30267	28753	20188	25625	8248
Motorcycles	48596	50353	45338	35461	35295	41339	15502
Mopeds	42269	48139	49899	35788	27754	44174	9551
Total Two Wheelers	113971	124728	125504	100002	83237	111138	33301
Three Wheelers	32214	21973	18595	21138	18388	16263	3859
Grand Total	193578	200182	191176	159370	139956	168215	53860

OVERVIEW OF PERFORMANCE

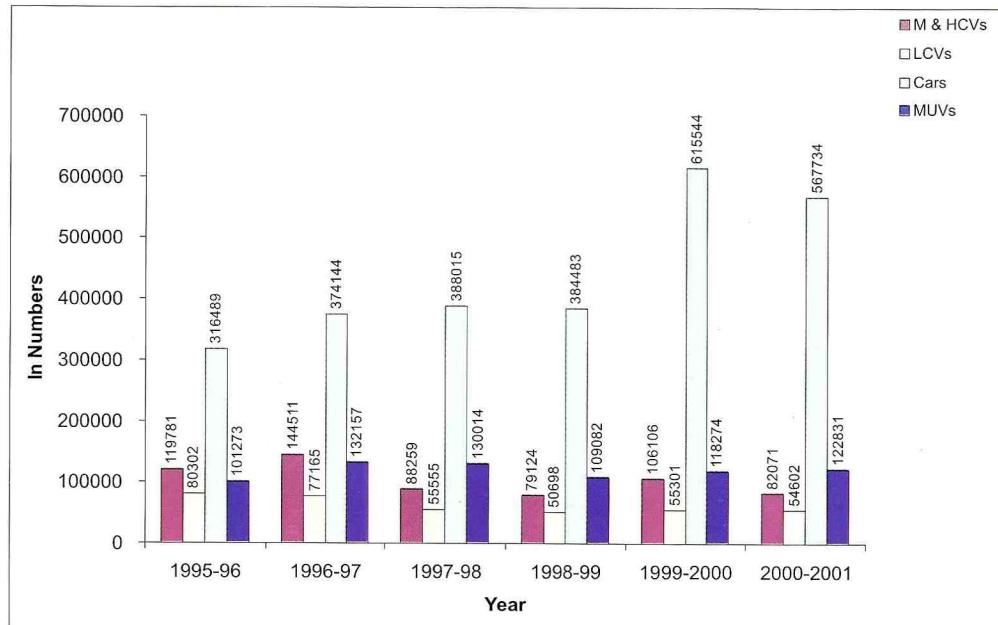
Automobile Production Trend for Four Wheelers



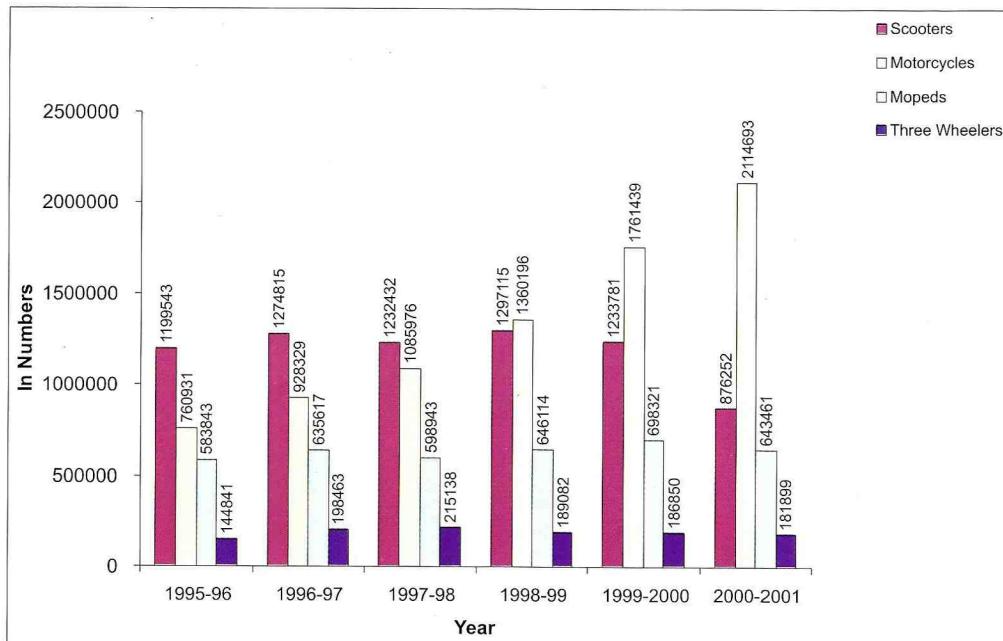
Automobile Production Trend for Two & Three Wheelers



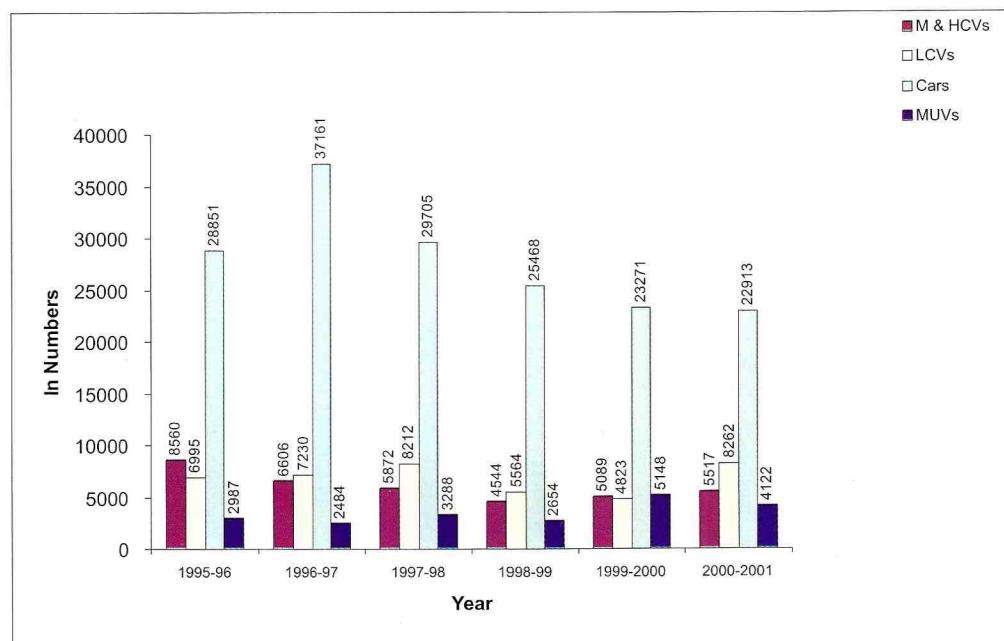
Automobile Domestic Sales Trend for Four Wheelers



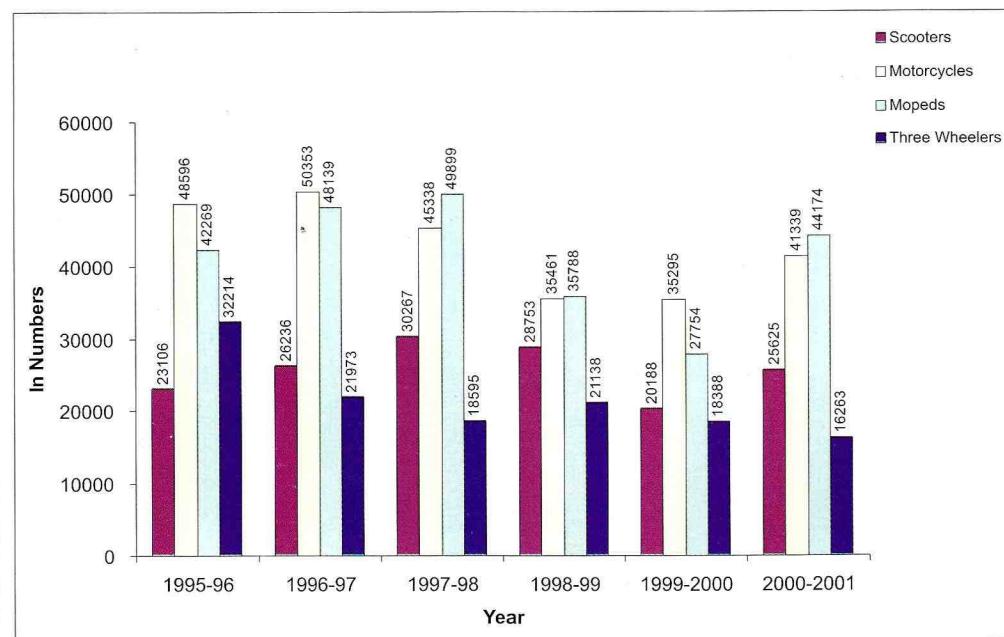
Automobile Domestic Sales Trend for Two & Three Wheelers



Automobile Exports Trend for Four Wheelers



Automobile Exports Trend for Two & Three Wheelers



SIAM OFFICE BEARERS

EXECUTIVE COMMITTEE 2000-2001

Company	Member	Alternate Member
TVS-Suzuki	Mr Venu Srinivasan (President)	Mr C P Raman
Ashok Leyland	Mr R Seshasayee (Vice President)	
Eicher Motors	Mr Subodh Bhargava (Treasurer)	
Bajaj Auto	Mr Madhur Bajaj	
Daewoo Motors India	Mr Young - Tae Cho	Mr D W Kim
Eicher Motors	Mr S Sandilya	Mr Rakesh Kalra
Fiat India Automobiles	Mr Maurizio Paolo Bianchi	Mr Ramesh L Adige
Ford India	Mr Philip G Spender	Mr B S Rathor
Hero Honda Motors	Mr Pawan Kant Munjal	
Hyundai Motor India	Mr Yang Soo Kim	Mr A P Gandhi
LML	Mr Deepak Kumar Singhania	Mr R D Jayal
Mahindra & Mahindra	Mr Anand Mahindra	Mr Alan Durante
Majestic Auto	Mr Pankaj Munjal	Mr Mahesh Munjal
Maruti Udyog	Mr Jagdish Khattar	Dr K Kumar
Mercedes-Benz India	Mr Juergen Ziegler	Mr S M Kadlaskar
Tata Cummins	Mr Ravi Venkatesan	Mr Yul J Tarr
Tata Engineering	Mr Ravi Kant	Mr J Ramnath
Toyota Kirloskar Motors	Mr Sachio Yamazaki	Mr K K Swamy
Yamaha Motors	Mr Masahiko Shibuya	Mr S Yonezawa

OFFICE
BEARERS

**OTHER COMMITTEES, SUB-COMMITTEES,
WORKING GROUPS & TASK FORCES, 2000 - 2001**

Committee

Committee	Chairman
Infrastructure Committee	Mr Philip G Spender, Ford India
Raw Materials Committee	Mr. Ravi Kant, Tata Engineering
CMVR, Safety & Regulations Committee	Dr K Kumar, Maruti Udyog
Emission Committee	Dr Pawan Goenka, Mahindra & Mahindra

Sub-Committee

Two & Three Wheeler Sub-Committee	Mr N V Iyer, Bajaj Auto
Commercial Vehicle Sub-Committee	Mr A Ramasubramanian, Eicher Motors
Passenger Car & MUV Sub-Committee	Mr I V Rao, Maruti Udyog

Working Group

Working Group on CMVR	Mr T M Balaraman, Bajaj Auto
Working Group on Fuels	Mr R P Sharma, Mahindra & Mahindra

Task Force

Task Force on Vehicle Classification	Mr Abhay Firodia, Bajaj Tempo
Task Force on Used Vehicles	Mr Philip G Spender, Ford India
Task Force on Passenger Cars	Mr Jagdish Khattar, Maruti Udyog
Task Force on Definitional Issues related to Auto Policy	Mr Ramesh L Adige, Fiat India

Society of Automotive Fitness & Environment (SAFE)

Mr R Ramakrishnan (President),
Ashok Leyland
Dr K Kumar (Vice President),
Maruti Udyog
Mr Harjeet Singh (Treasurer),
Hero Honda Motors

PRESIDENTS

Year	Name	Company
1960	Mr Lalchand Hirachand*	Premier Automobiles Ltd
1961	Sir L P Misra*	Hindustan Motors Ltd
1962 & 63	Mr A E L Collins*	Ashok Leyland Ltd
1964	Mr Keshub Mahindra	Mahindra & Mahindra Ltd
1965 & 66	Dr M A Chidambaram*	Automobile Products of India Ltd
1967 & 68	Mr K V Srinivasan	Standard Motor Prod. Of India Ltd
1969	Mr A H Tobaccowala	Tata Engg. & Locomotive Co Ltd
1970 & 71	Mr A Sivasailam	Simpson & Co Ltd
1972 & 73	Mr N K Firodia*	Bajaj Tempo Ltd
1974 & 75	Mr J E Talaulicar	Tata Engg. & Locomotive Co Ltd
1976 & 77	Mr Rahul Bajaj	Bajaj Auto Ltd
1978 & 79	Mr P N Venkatesan	Premier Automobiles Ltd
1980 & 81	Mr C V Karthik Narayanan	Standard Motor Prod. of India Ltd
1982 & 83	Mr R J Shahaney	Ashok Leyland Ltd
1984 & 85	Mr V Krishnamurthy	Maruti Udyog Ltd
1986 & 87	Mr S L Bhatter	Hindustan Motors Ltd
1988/89 & 1989/90	Mr B De Souza	Mahindra & Mahindra Ltd
1990/91 & 1991/92	Mr Abhay Firodia	Bajaj Tempo Ltd
1992-93	Mr Subodh Bhargava	Eicher Motors Ltd
1993/94 & 1994/95	Mr Vinod L Doshi	Premier Automobiles Ltd
1995/96 & 1996/97	Mr Brijmohan Lall	Hero Honda Motors Ltd
1997/98 & 1998/99	Mr V M Raval	Tata Engineering
1999/00 & 2000/01	Mr Venu Srinivasan	TVS-Suzuki Ltd.

* Since deceased

MEMBERS OF
SOCIETY OF INDIAN AUTOMOBILE MANUFACTURERS

1. Ashok Leyland Ltd
2. Bajaj Auto Ltd
3. Bajaj Tempo Ltd
4. Daewoo Motors India Ltd
5. Eicher Group
6. Fiat India Automobiles Ltd
7. Ford India Ltd
8. General Motors India Pvt Ltd
9. Greaves Ltd
10. Hero Briggs & Stratton Auto Ltd
11. Hero Honda Motors Ltd
12. Hindustan Motors Ltd
13. Honda Siel Cars India Ltd
14. Honda Motorcycle and Scooter India (Pvt) Ltd
15. Hyundai Motor India Ltd
16. Kinetic Engineering Ltd
17. Kinetic Motor Company Ltd
18. LML Ltd
19. Mahindra & Mahindra Ltd
20. Majestic Auto Ltd
21. Maruti Udyog Ltd
22. Maharashtra Scooters Ltd
23. Mercedes – Benz India Ltd
24. Piaggio Greaves Vehicles Ltd
25. Premier Automobiles Ltd
26. Royal-Enfield Motors
27. Simpson & Co. Ltd
28. Swaraj Mazda Ltd
29. Tata Engineering
30. Tata Cummins Ltd
31. Toyota Kirloskar Motor Ltd
32. TVS-Suzuki Ltd
33. Vehicle Factory Jabalpur
34. Volvo India Pvt. Ltd
35. Yamaha Motor India Pvt Ltd

AFFILIATION & LIAISON
WITH OTHER ASSOCIATIONS & INSTITUTIONS

INDIA

- All India Motor Congress, New Delhi
- Association of State Road Transport Undertakings, New Delhi
- Automotive Component Manufacturers Association of India, New Delhi
- Automotive Tyre Manufacturers Association, New Delhi
- Automotive Research Association of India, Pune
- Bureau of Indian Standards, New Delhi
- Central Institute of Road Transport, Pune
- Central Road Research Institute, New Delhi
- Confederation of India Industry, New Delhi
- Federation of Automobile Dealers Association, Mumbai
- Indian Institute of Petroleum, Dehradun
- Indian Machine Tool Manufacturers Association, New Delhi
- Institute of Driving Training & Research, New Delhi
- Institute of Road Traffic & Education, New Delhi
- Vehicles Research & Development Establishment, Ahmednagar

OVERSEAS

- MOU-Partner : The Society of Motor Manufacturers & Traders Ltd, London, UK
- Founder Member : Federation of Asian Motorcycles Industries, Singapore
- Association of Fabrics de Automotores, Buenos Aires, Argentina
- Association Nazionale fra Industrie Automobilistiche, Torino, Italy
- Chambers Syndicate des Constructeurs d Automobiles, Paris, France
- China Association of Automobile Manufacturers, Beijing, P R China
- Japan Automobile Manufacturers Association Inc, Tokyo, Japan
- Organisation Internationale des Constructeurs d Automobiles, Paris, France
- Verband der Automobilindustrie e.v. Frankfurt, Germany
- Indonesian Motorcycle Industry Association, Jakarta, Indonesia
- Korea Automobile Manufacturers Association, Seoul, Korea
- Motorcycle and Scooter Assemblers and Distributors Association of Malaysia, Penang, Malaysia
- Motorcycle Development Program Participants Association, Pasig City, Philippines
- Singapore Motorcycle Trade Association, Singapore
- Thai Automotive Industry Association, Bangkok, Thailand
- Taiwan Transportation Vehicle Manufacturers Association, Taipei, Taiwan

SIAM SECRETARIAT

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Senior Adviser : Mr K K Gandhi

Director : Mr Pankaj Gupta

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