

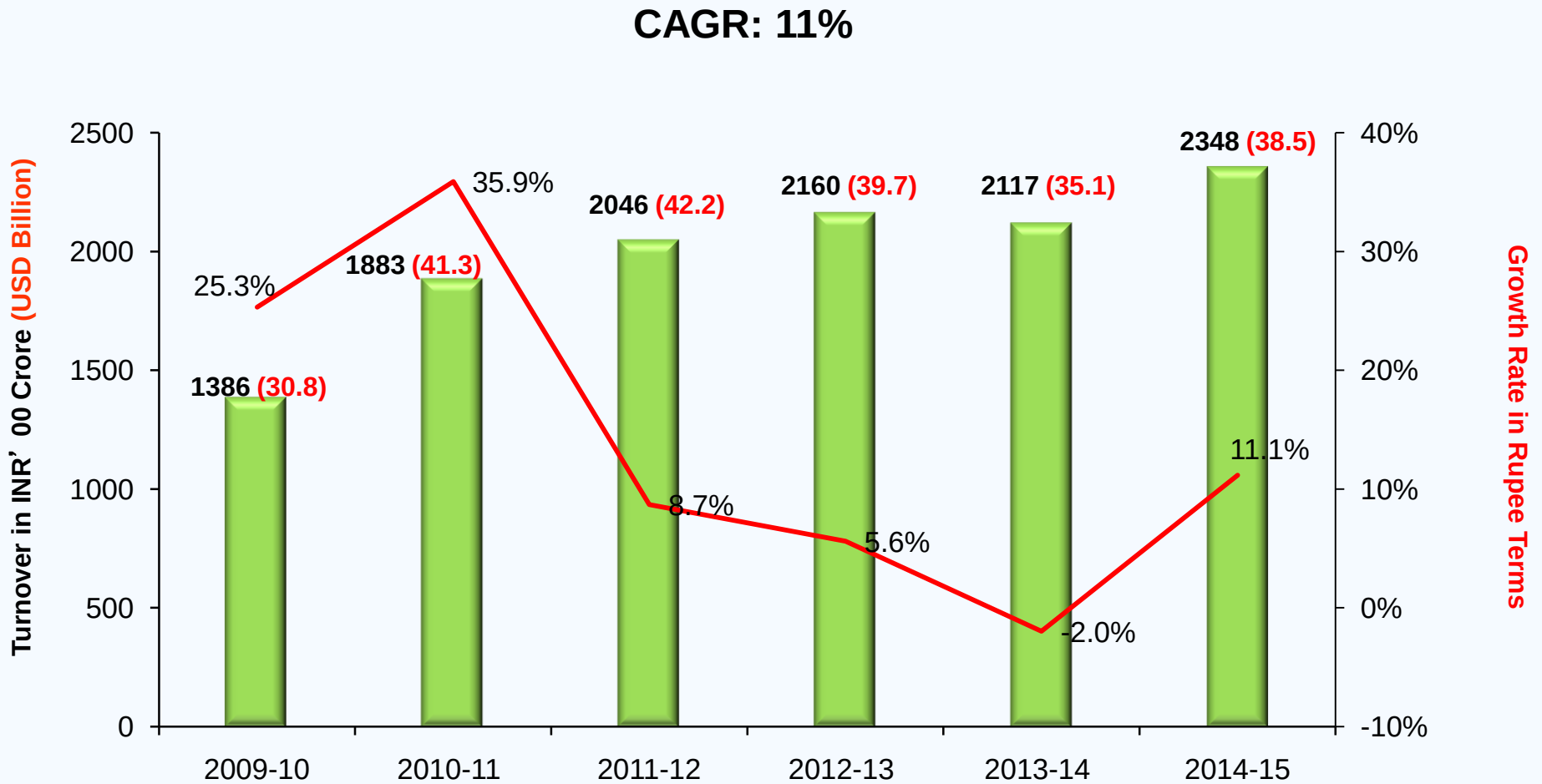


The Indian Auto Component Industry: Performance Review 2014-15



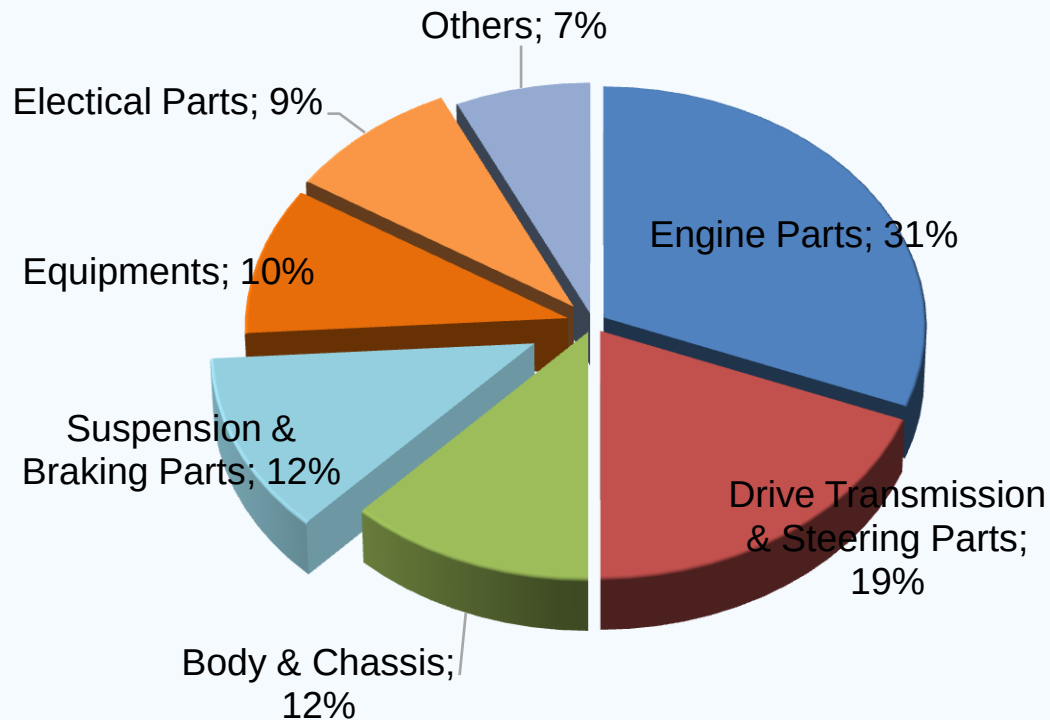
**Media Briefing
30th June 2015**

Turnover - Auto Component Industry: 2010-15



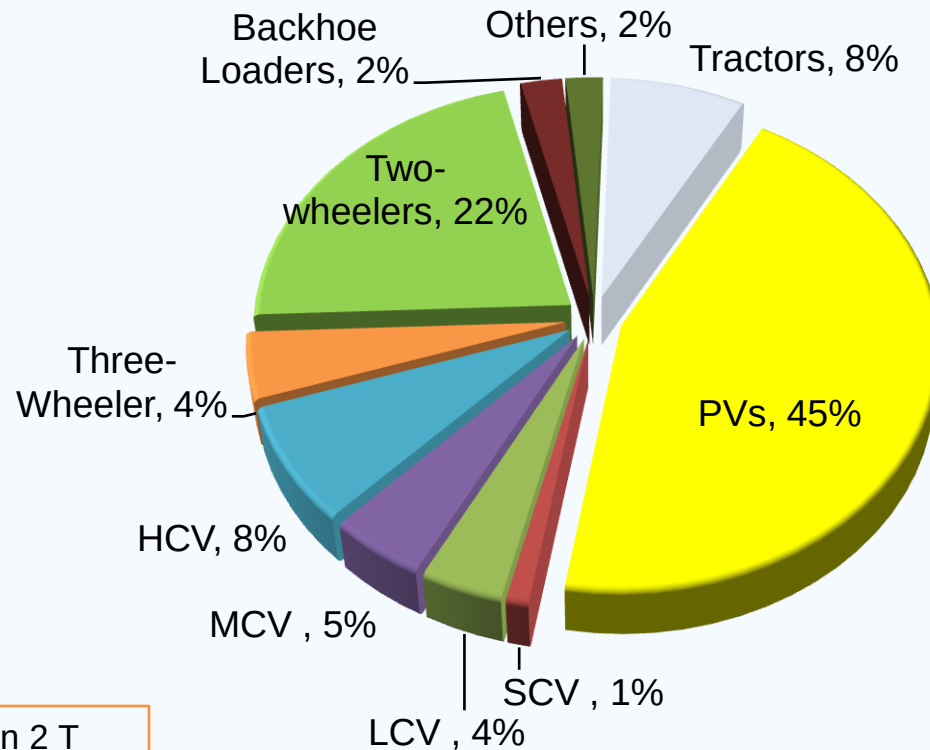
(Turnover includes supplies to OEMs, aftermarket sales and exports)

Product Range - Auto Component Industry



The Industry produces **High Quality – Cost Competitive Components** in all product segments.

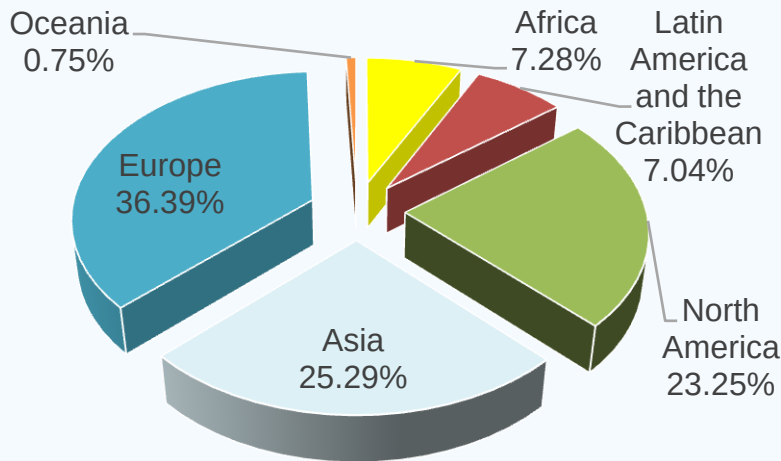
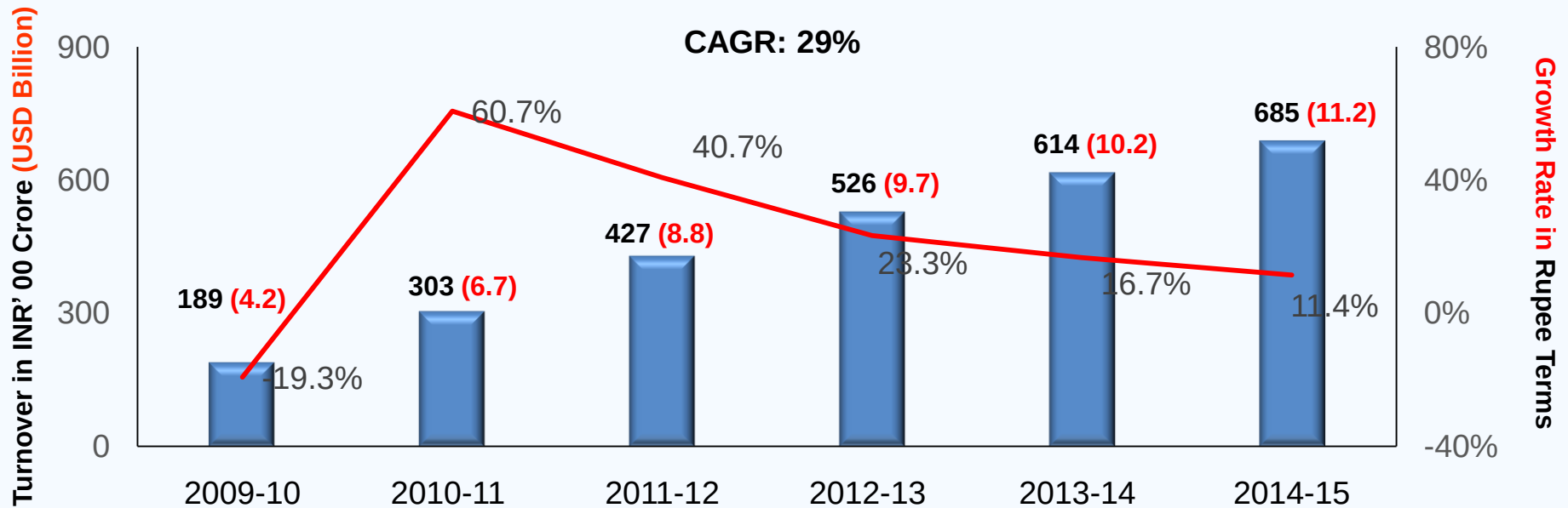
Auto Components Supply to OEMs



SCV	Less than 2 T
LCV	2 to 7.5 T
MCV	7.5 to 16 T
HCV	More than 16 T

OEMs consumption includes locally produced Components and Imports

Exports - Auto Component Industry: 2010-15

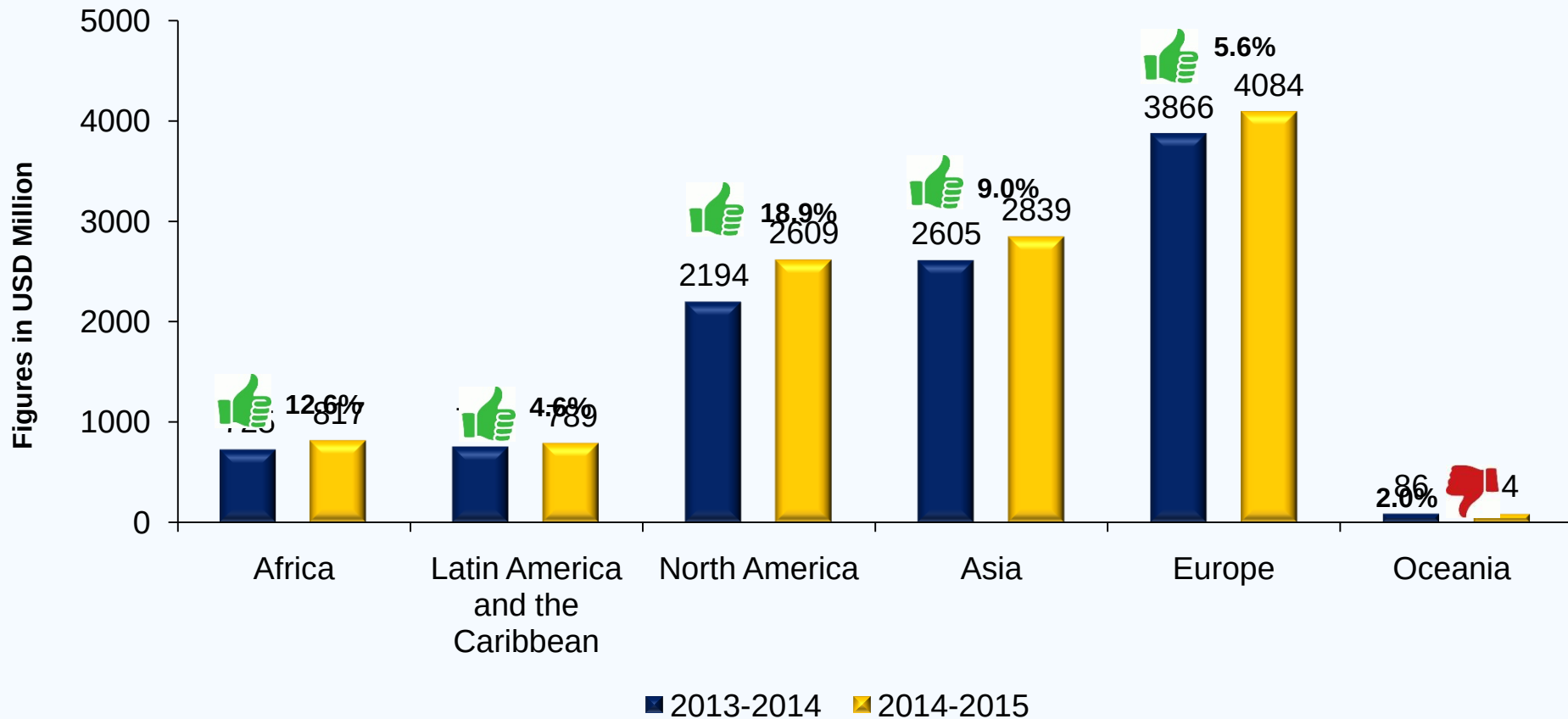


Exports Destinations: Top 10 Countries

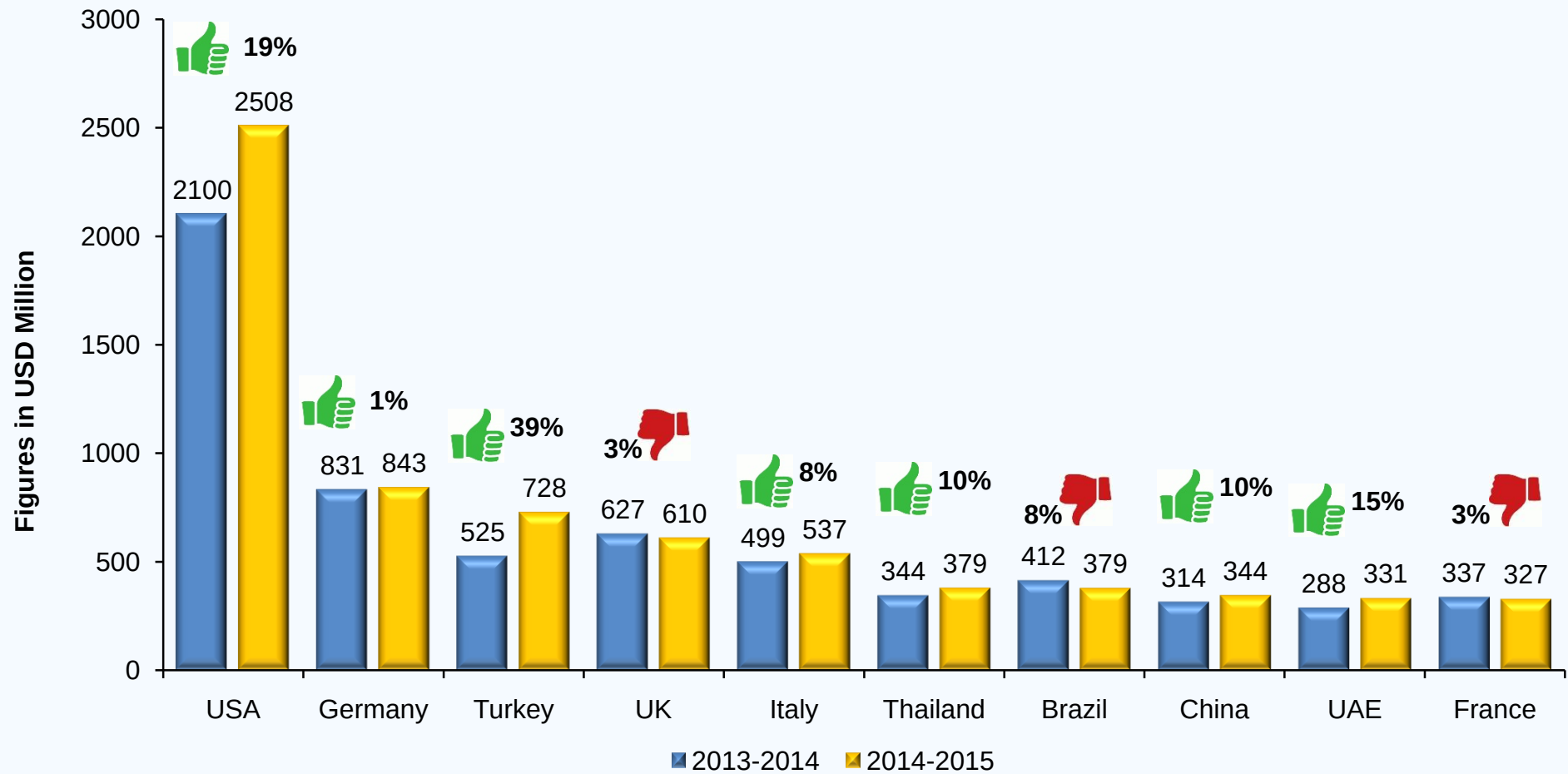
USA	22.35	Thailand	3.38
Germany	7.51	Brazil	3.37
Turkey	6.49	China	3.07
UK	5.43	UAE	2.95
Italy	4.79	France	2.92

Exports by Region

India's Export Growth Rate: -1.2%
Auto Component Export Growth Rate: 10%



Exports: Top 10 countries



Key Auto Components Exported

Exports

Hydraulic Power Steering Systems & Steering Gear Systems and Parts

Gear boxes and parts

Parts of Diesel Engines

Parts for automobiles and earth moving Equipment

Drive-axles and parts

Spark Ignition and parts

Suspension systems and parts

Crank shaft for engines

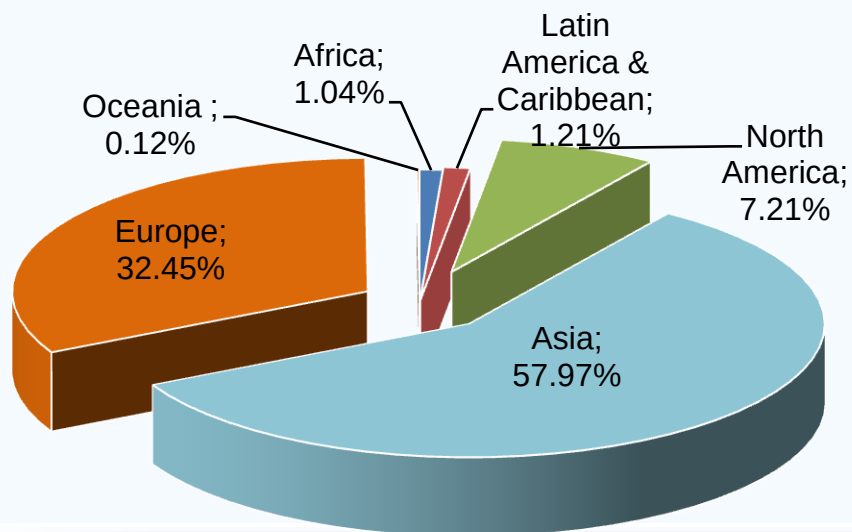
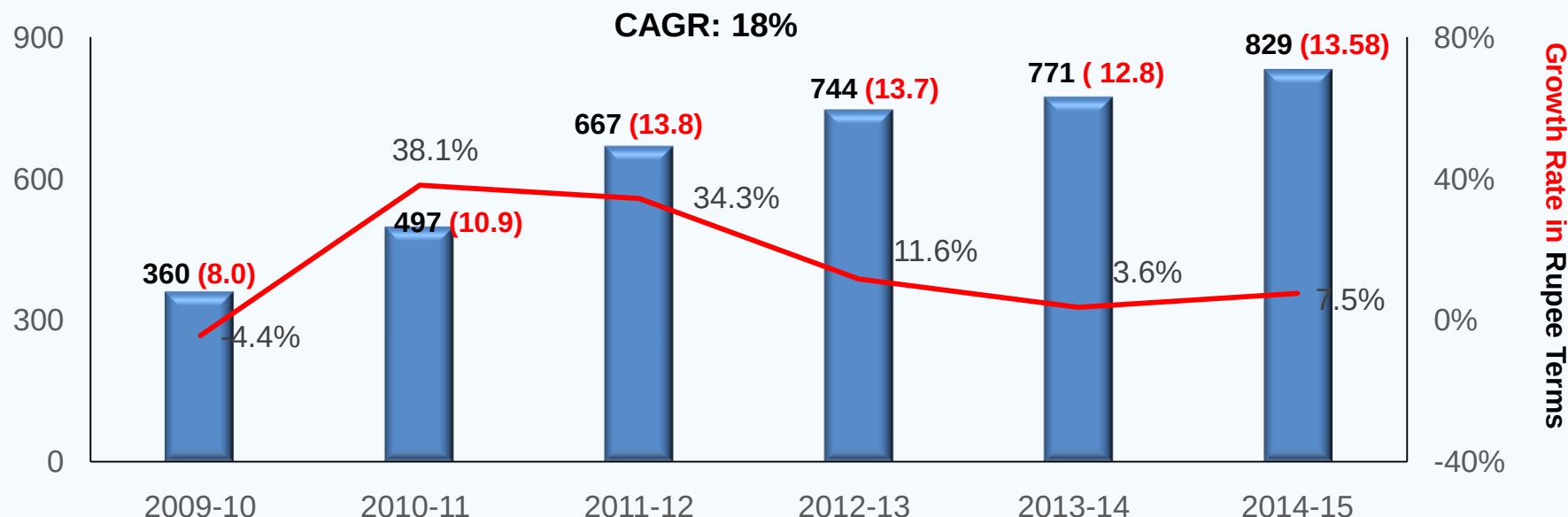
Toothed wheels, other transmission parts

Brakes and servo-brakes; parts

(Illustrative list/ Products in random order)

Imports - Auto Component Industry: 2010-15

Turnover in INR' 00 Crore (USD Billion)

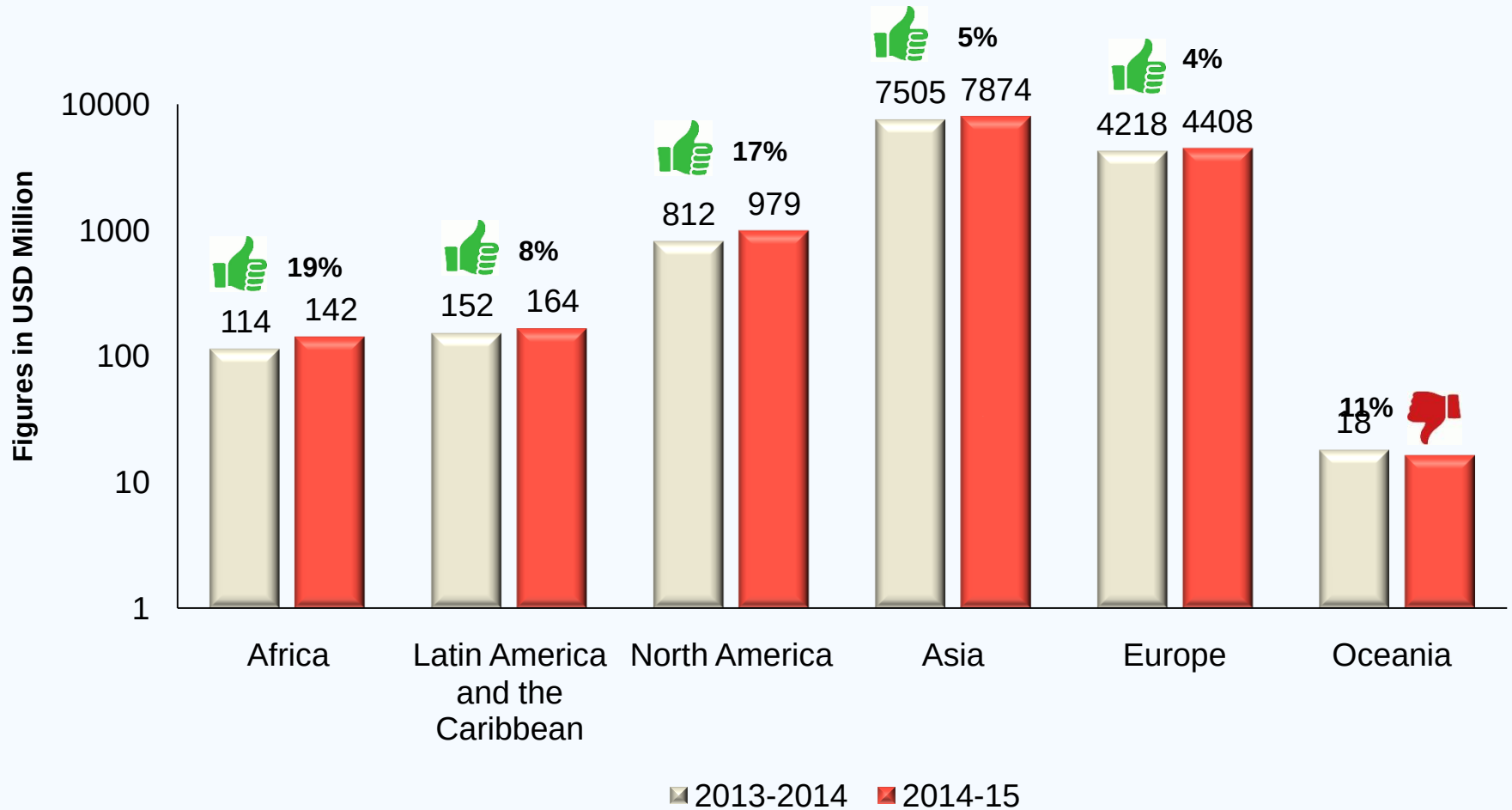


Origin of Imports: Share of Top 10 in %

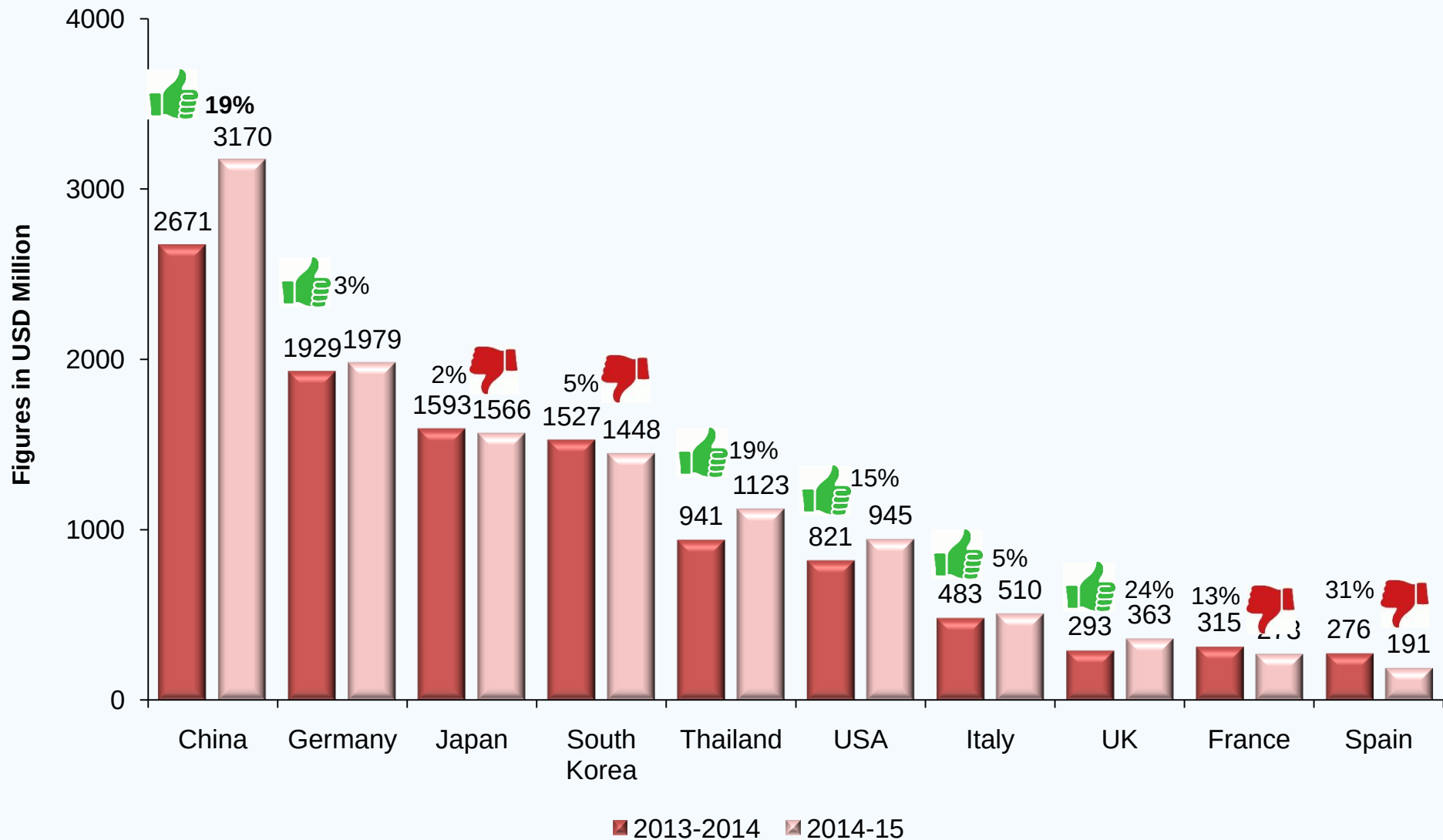
China	23.94	USA	6.96
Germany	14.57	Italy	3.75
Japan	11.53	UK	2.67
South Korea	10.66	France	2.01
Thailand	8.27	Spain	1.40

Imports by Region

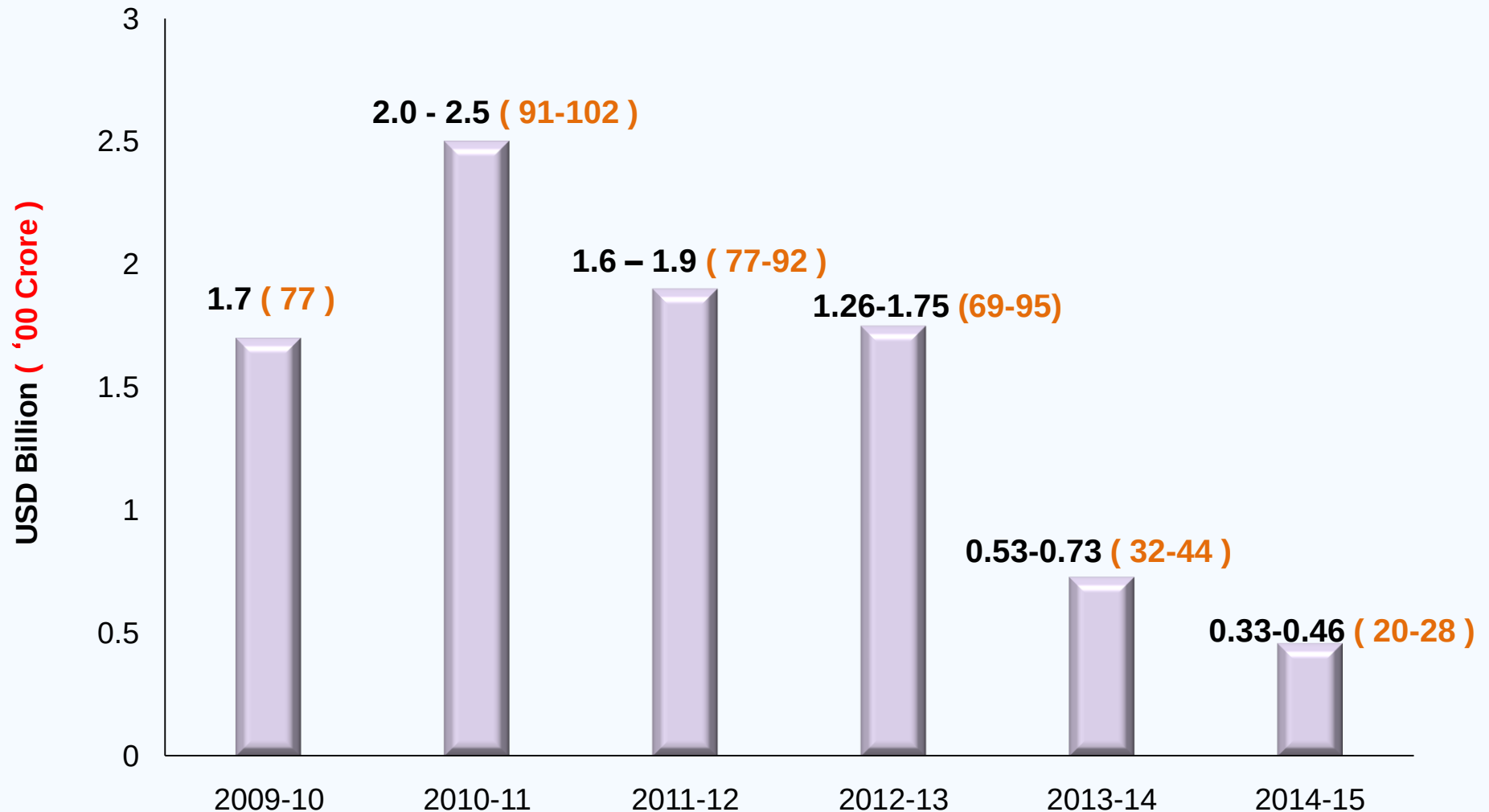
India's Import Growth Rate: - 0.4%
Auto Components Import Growth Rate: 6 %



Imports: Top 10 countries



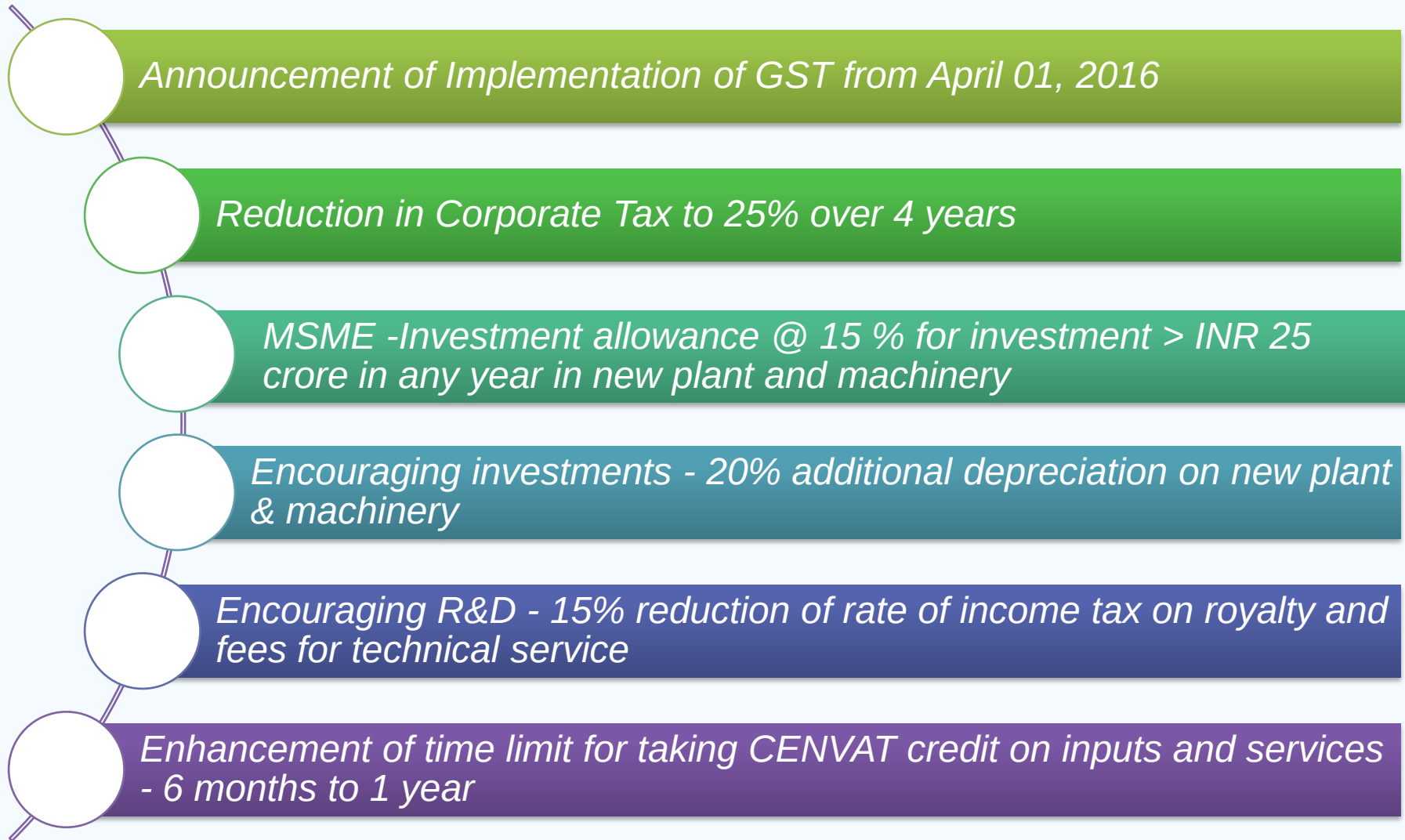
Capital Investment - Auto Component Industry: 2010-15



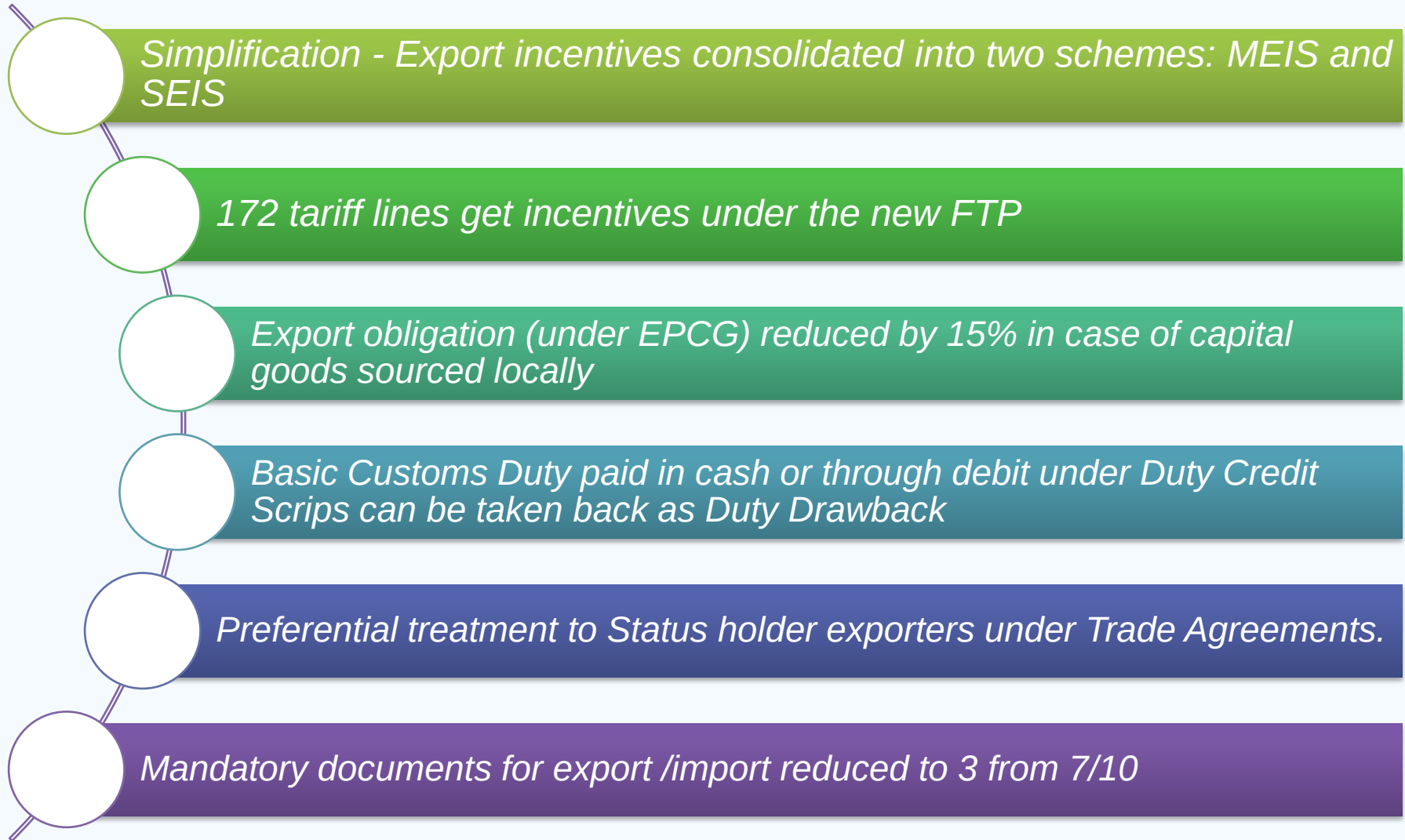
Aspiration 2020



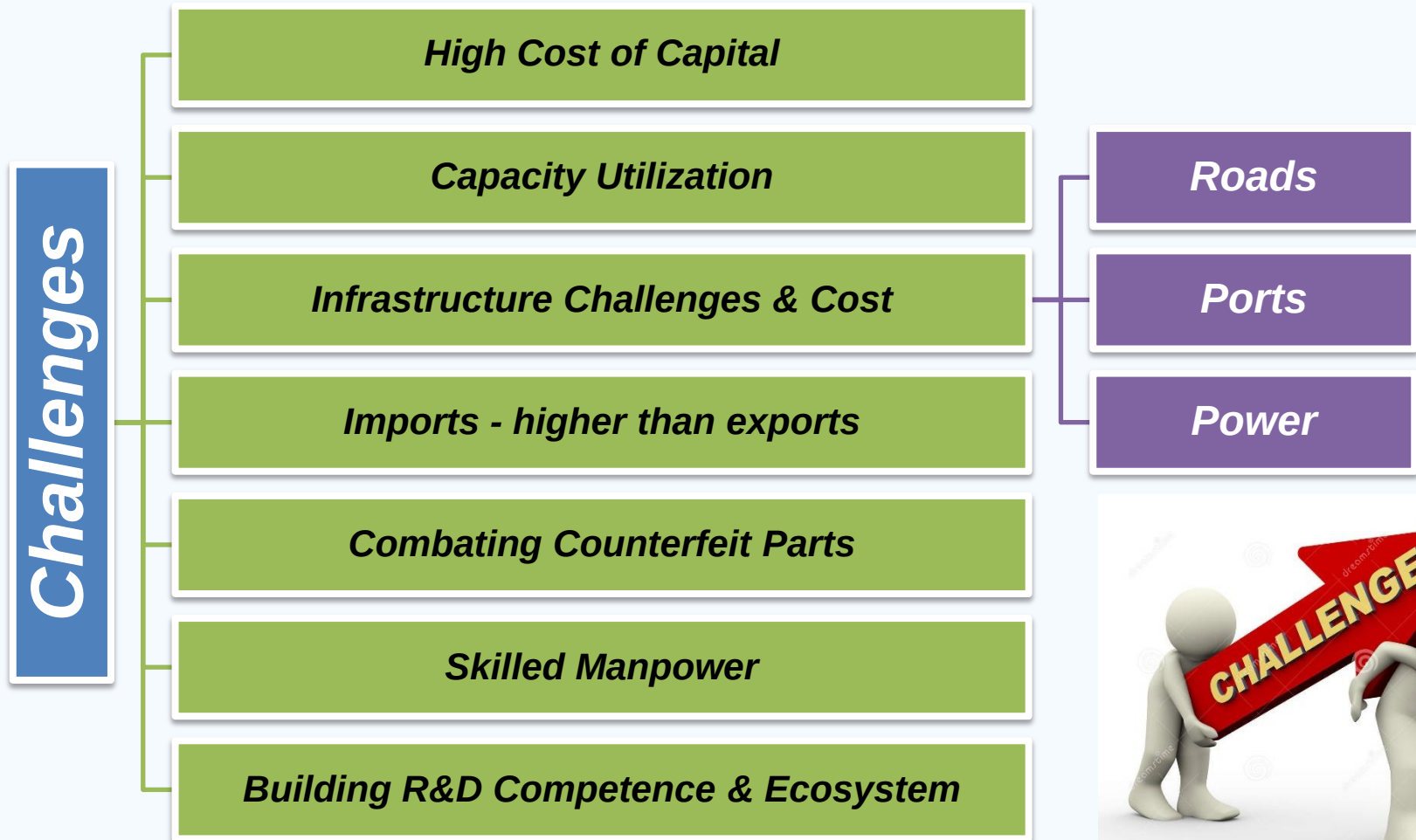
Favourable Government Policies - I



Favourable Government Policies - II



Challenges



Summary

Figures in INR' 00 Crs

	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15
Turnover	1,386	1,883	2,046	2,160	2,117	2,348
Growth rate(%)	25.3	35.9	8.7	5.6	-2.0%	11.1%
Export	189	303	427	526	614	685
Growth rate(%)	-19.2%	60.3%	40.9%	23.2%	16.7%	11.4%
Import	360	497	667	744	771	829
Growth rate(%)	-4.3%	38.1%	34.2%	11.5%	3.6%	7.5%
Investment	77	91-102	72-92	69-95	32-44	20-28

Summary

Figures in USD Billion

	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15
Turnover	30.8	41.3	42.2	39.7	35.1	38.5
Growth rate(%)	27.8	34.1	2.2	-5.9	-11.5	9.6
Export	4.2	6.6	8.8	9.7	10.2	11.2
Growth rate(%)	-17.6	58.6	32.3	9.9	5.4	10.0
Imports	8	10.9	13.8	13.7	12.8	13.5
Growth rate(%)	-2.4	36.3	26.2	-0.6	-6.3	6.1
Investment	1.7	2-2.5	1.6-1.9	1.2-1.7	0.53-0.73	0.33-0.46



Thank You

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