

The logo for the Automotive Component Manufacturers Association of India (ACMA) features the letters 'ACMA' in a bold, blue, sans-serif font.

Automotive Component Manufacturers Association of India

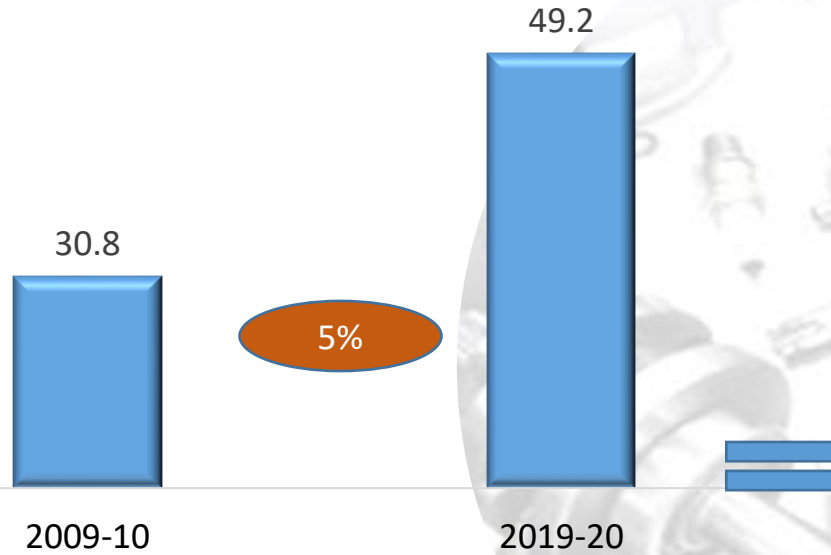
# Auto Components Industry Performance Review: 2019-20



Press Conference: August 19, 2020

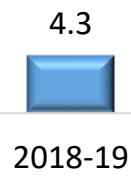
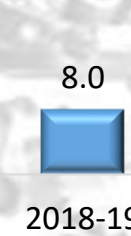
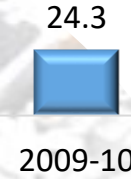
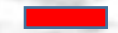
# Indian Auto Component industry – A key driver of Indian economy

## Industry Revenue



CAGR

(USD Billion)



Sales to OEMs

Imports

Exports

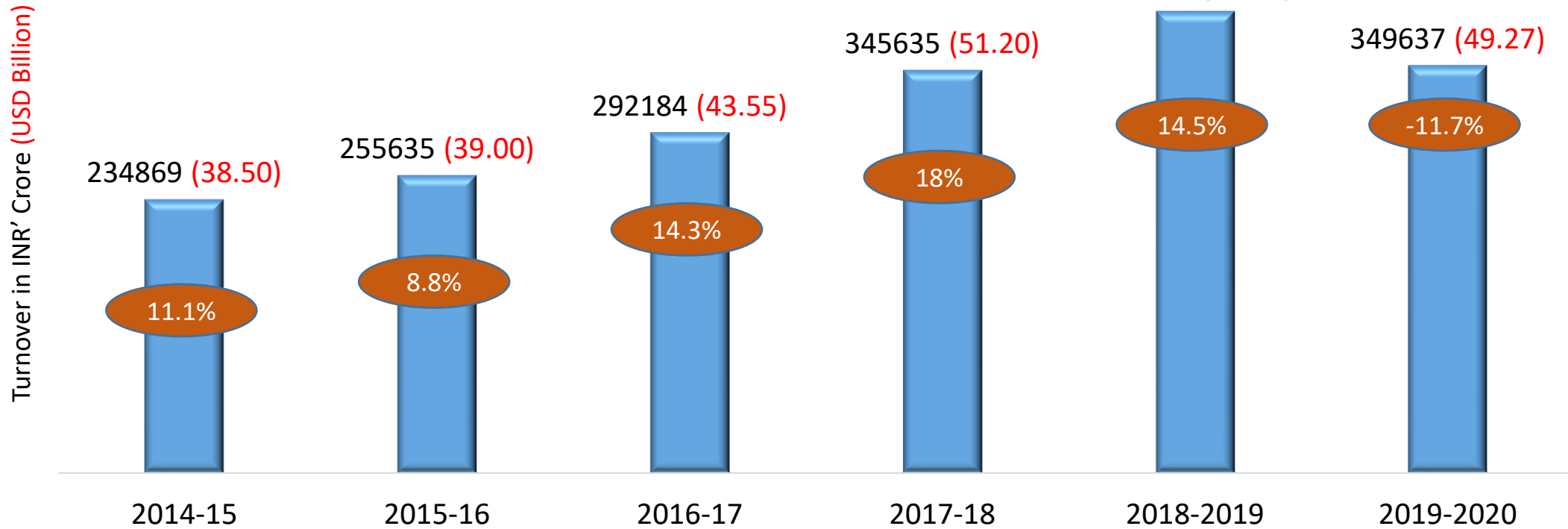
Dom. After-market

- Accounts for 2.3% of National GDP; 25% of manufacturing GDP
- 4% of exports
- Creates 50 lakh jobs
- Cost competitive; globally renowned for frugal engineering
- ~25% of exported; North America & Europe account for 60% of Exports
- India Share's in Global demand increased from 0.6% to 1.3% in last 10 years

# Auto Components Industry Performance: 2019-20

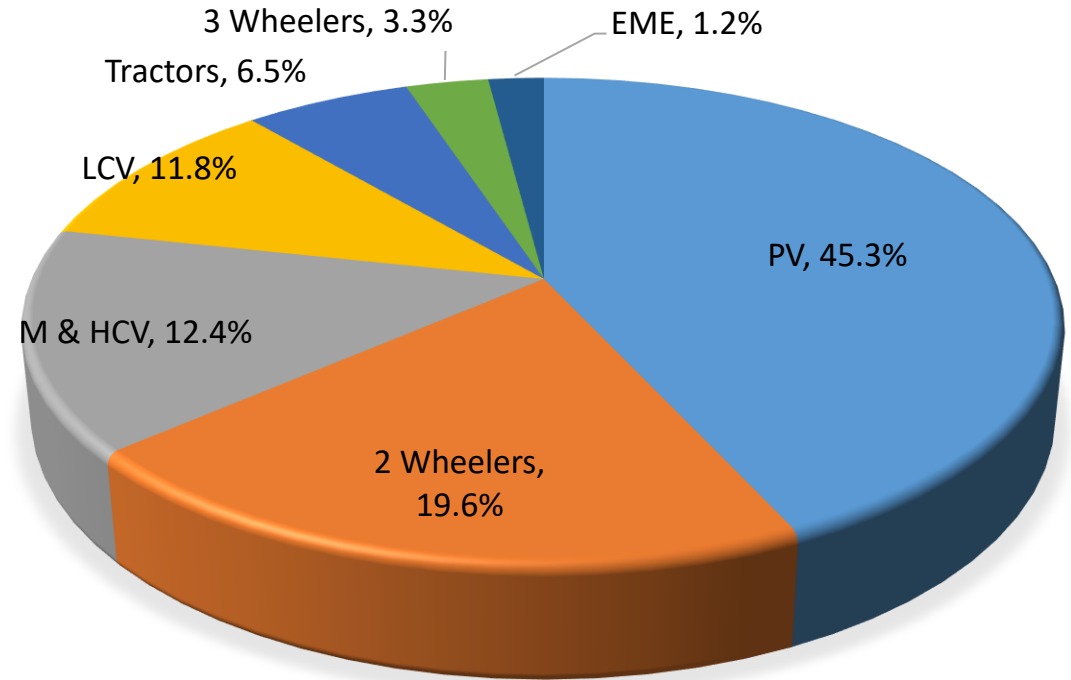
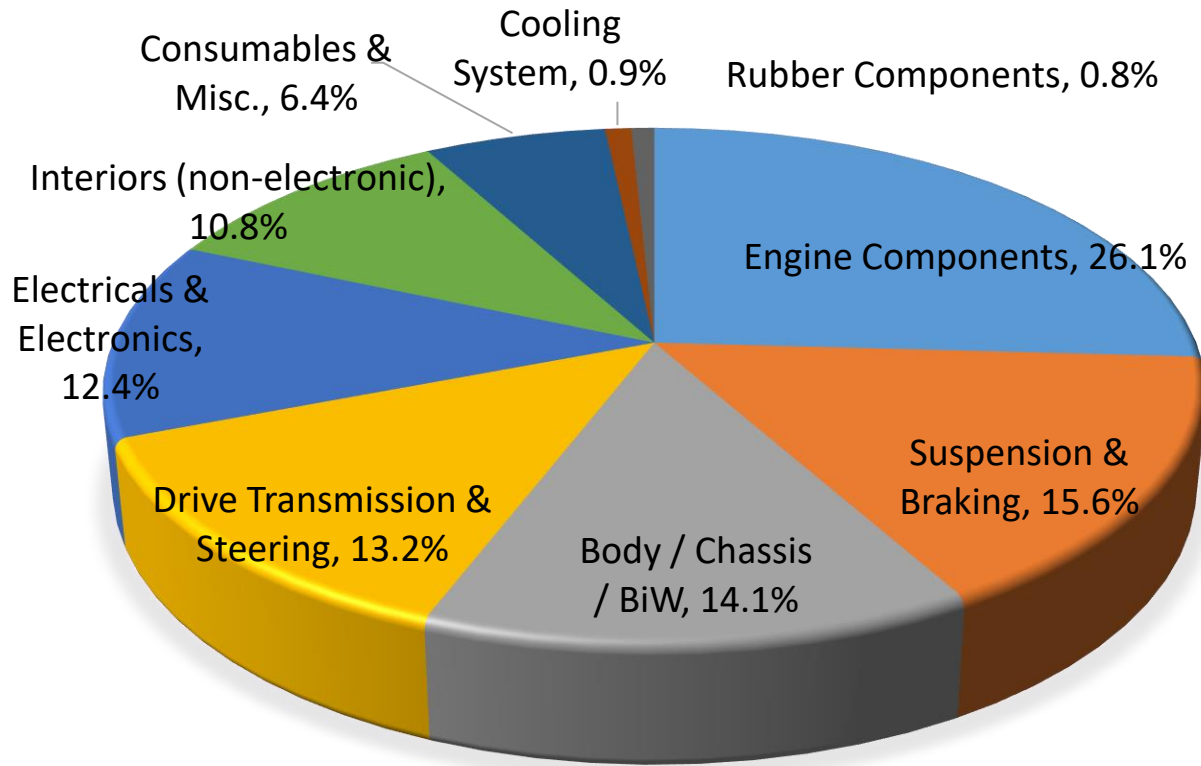
Growth

CAGR: 8%



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

# Product Range and Auto Components Supply to OEMs



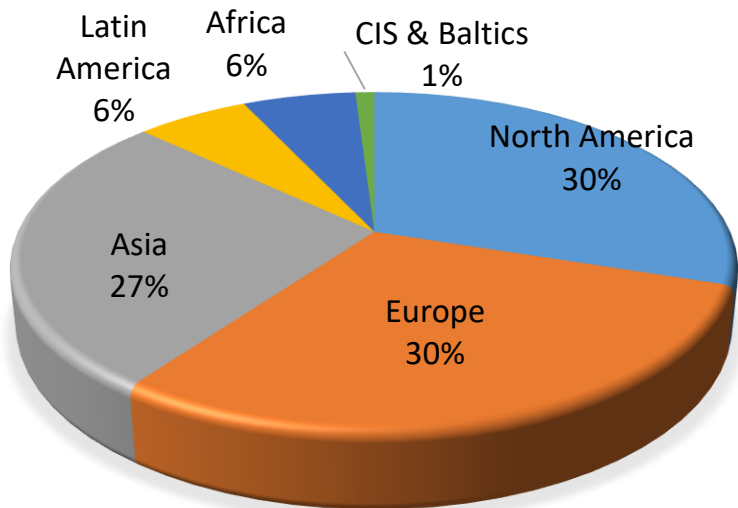
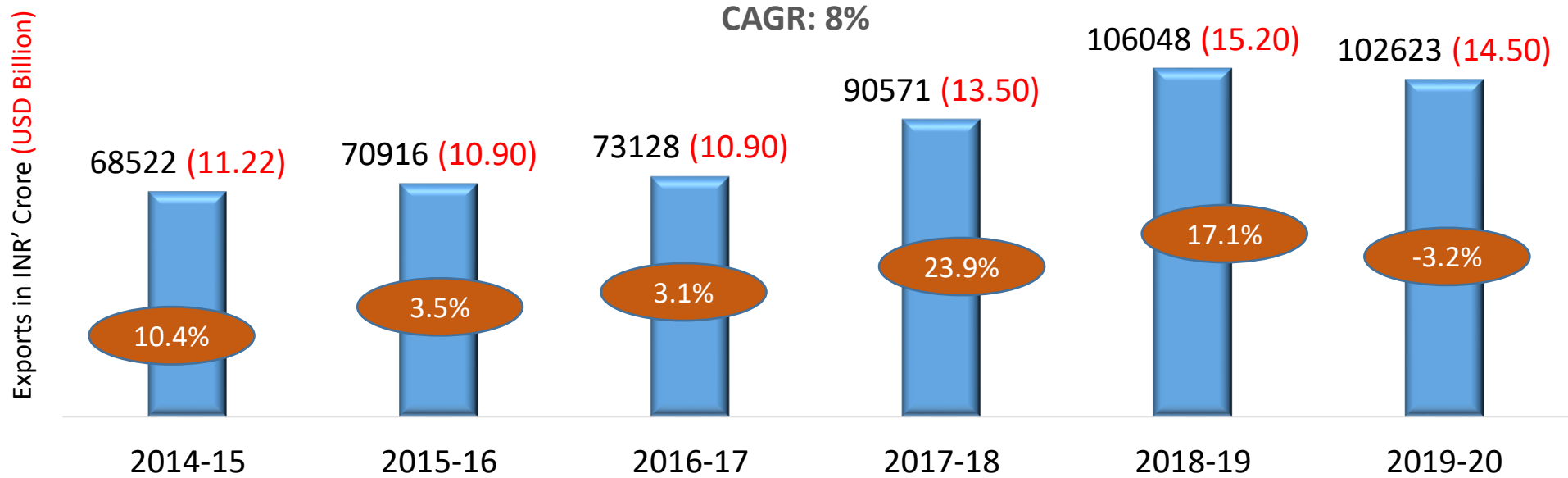
**Industry produces high quality, price competitive Components**

PV	Passenger Cars, Utility Vehicles, Vans
2Wh	Scooters, Motorcycles, Mopeds
LCV	All Commercial Vehicles < 7.5 T
M & HCVs	All Commercial Vehicles > 7.5 T
3Wh	Goods and Passenger 3 wheelers
Tractors	Tractors
EME	Earth Moving Equipment

\*OEMs consumption includes locally produced Components and Imports

# Exports – Auto Component Industry: 2019-20

Growth rate in INR



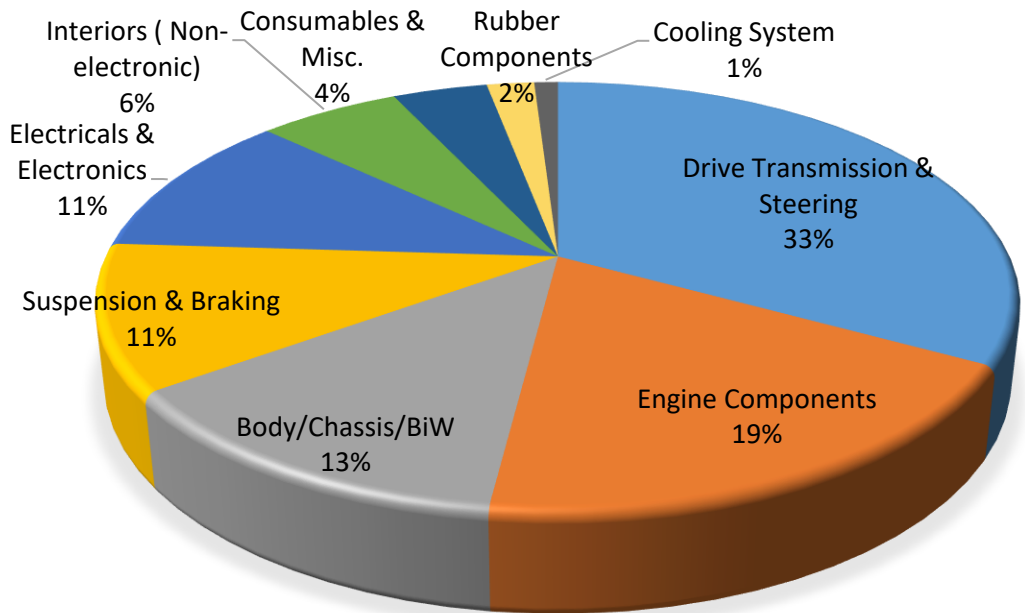
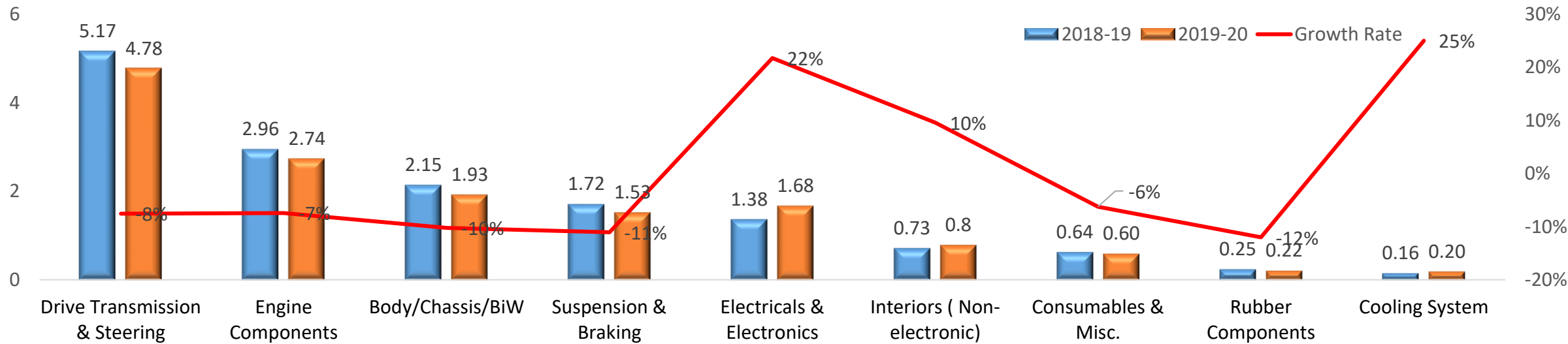
## Export Destinations: Top 10 Countries in %

USA	26%	Brazil	4%
Germany	7%	Italy	3%
Turkey	4%	Bangladesh	3%
Thailand	4%	Mexico	3%
UK	4%	UAE	3%

61%

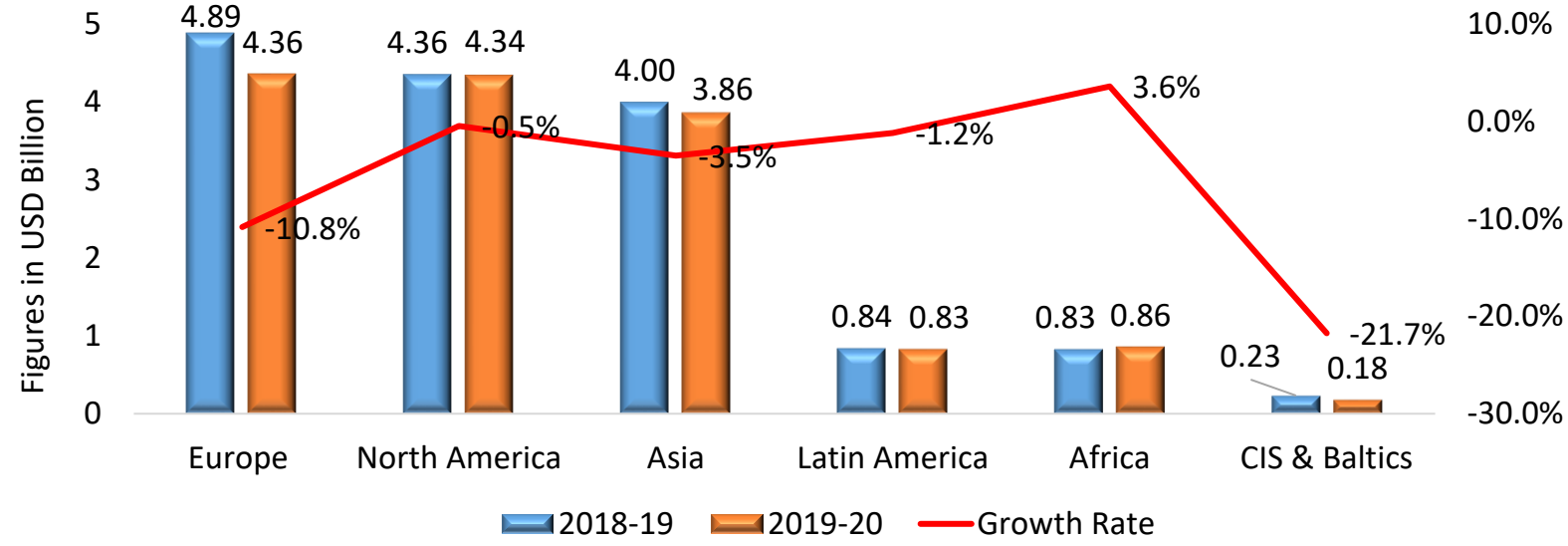
# Segmentation by Product type: Exports

Figures in USD Billion

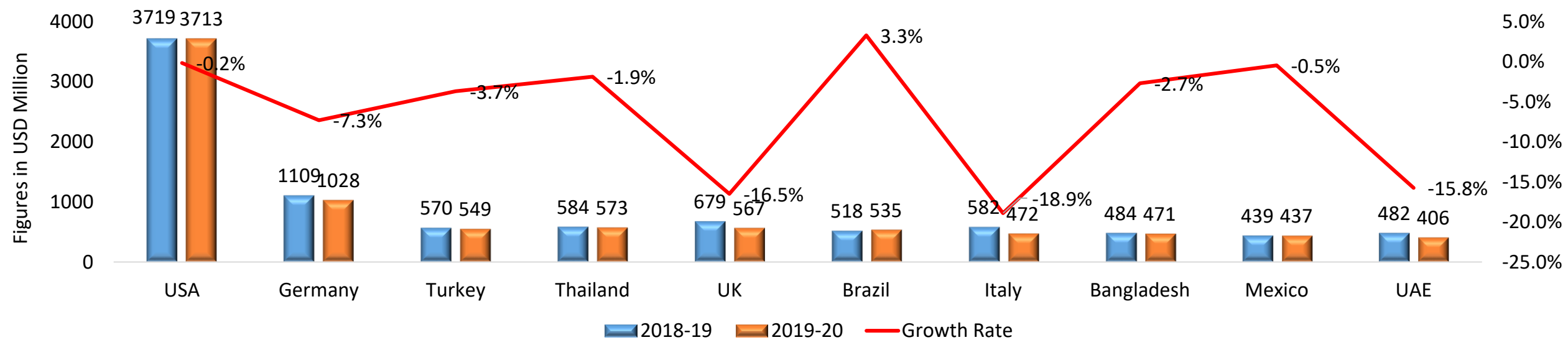


- Engine, Transmission and Steering parts continue to account for more than half of all components ( 52%) exports from India.
- Electricals & Electronics registered 22% growth

# Region wise and country wise exports



- Europe accounting for 30% of exports, saw a decline of 11%
- North America and Asia, accounting for 30% and 27% respectively registered marginal decline.
- Only Brazil registered a marginal growth amongst top 10 countries

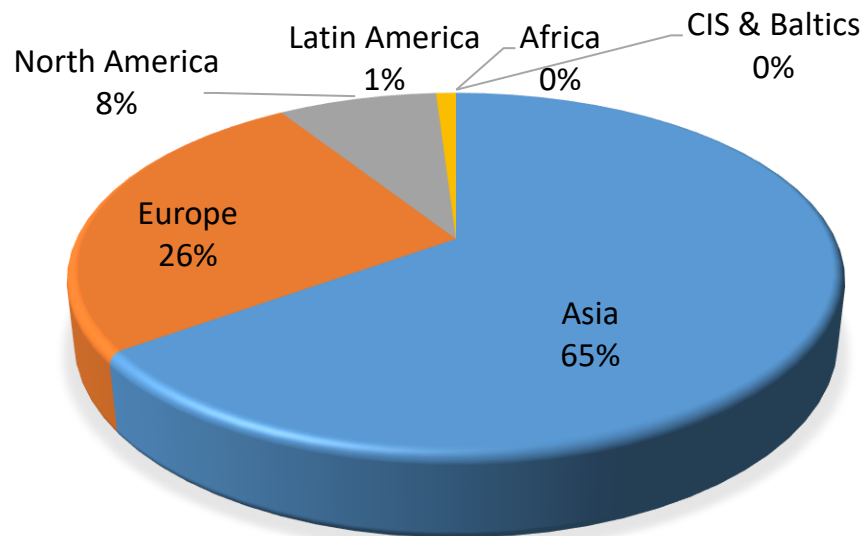
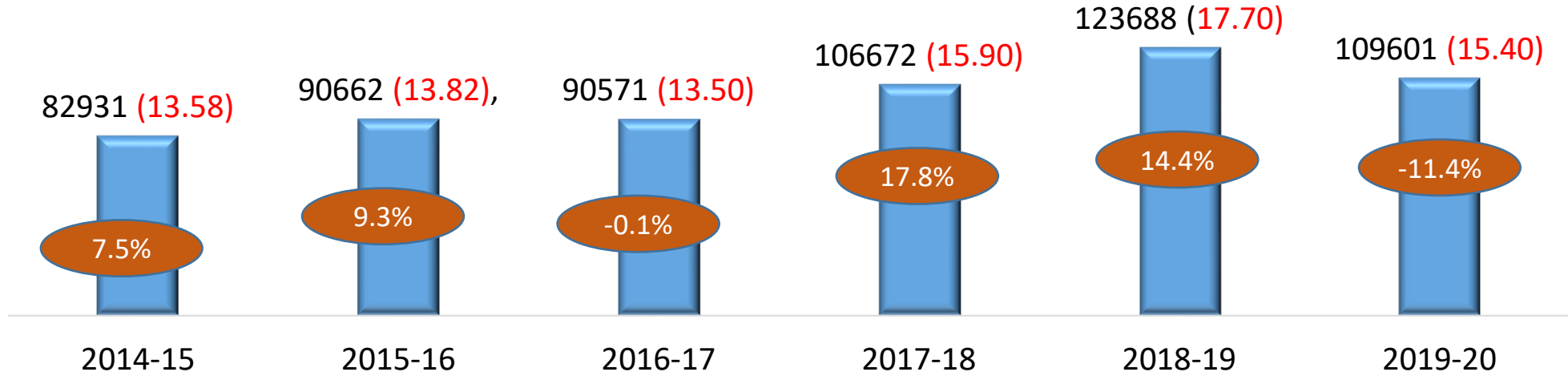




# Imports – Auto Component Industry: 2019-20

Growth rate in INR

CAGR:6%



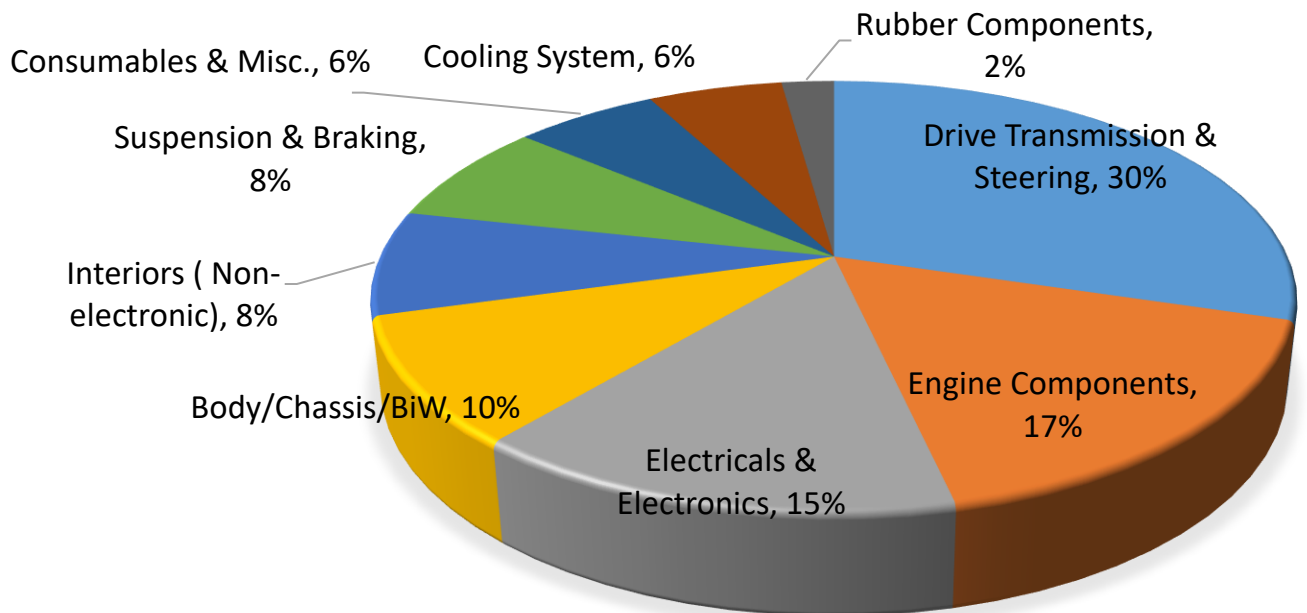
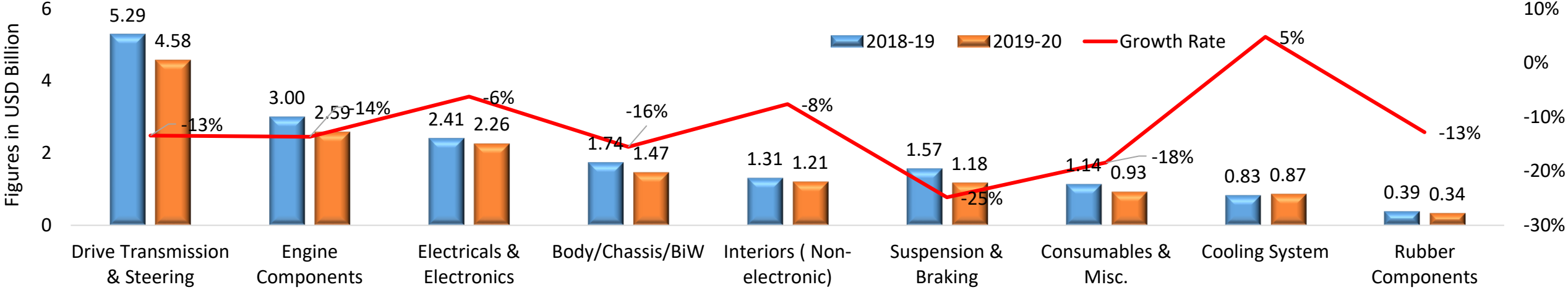
## Origin of Imports: Top 10 Countries in %

China	26%	Thailand	5%
South Korea	14%	Singapore	5%
Germany	11%	Italy	3%
Japan	9%	UK	3%
USA	7%	Belgium	3%

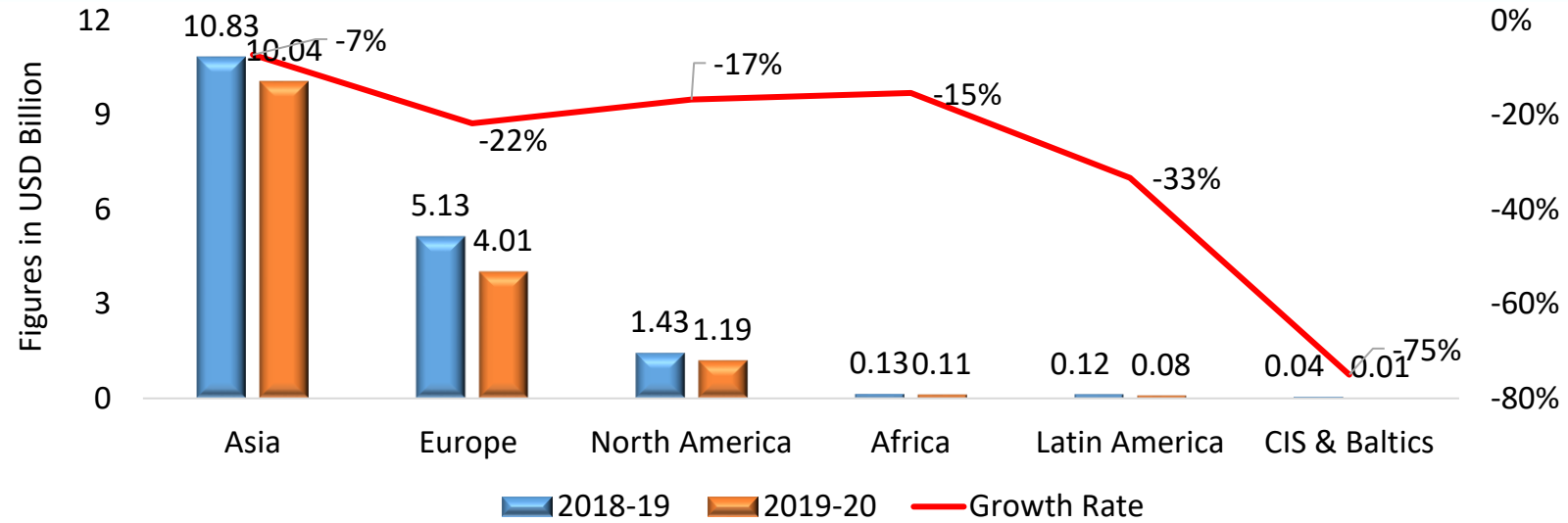
85%



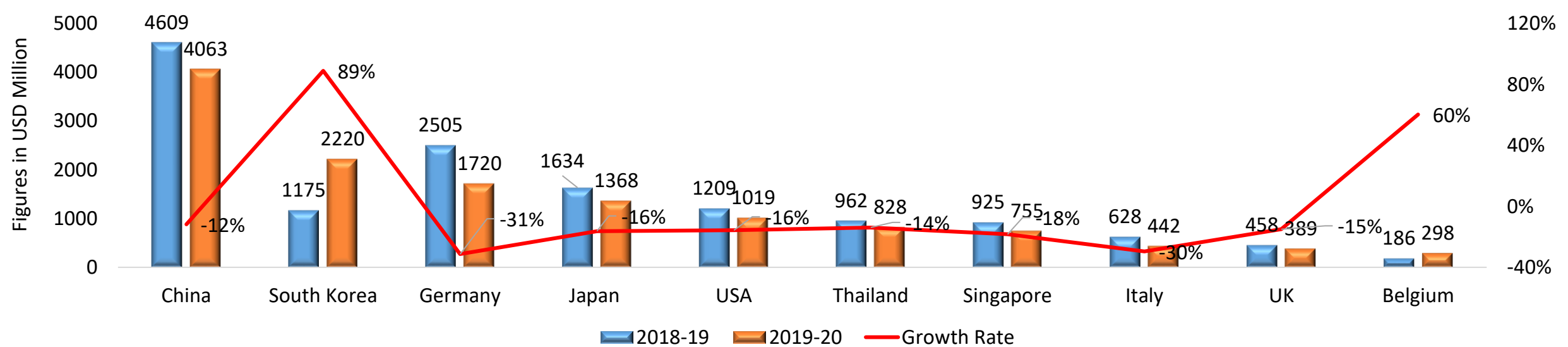
# Segmentation by Product type: Imports



# Region wise and country wise Imports

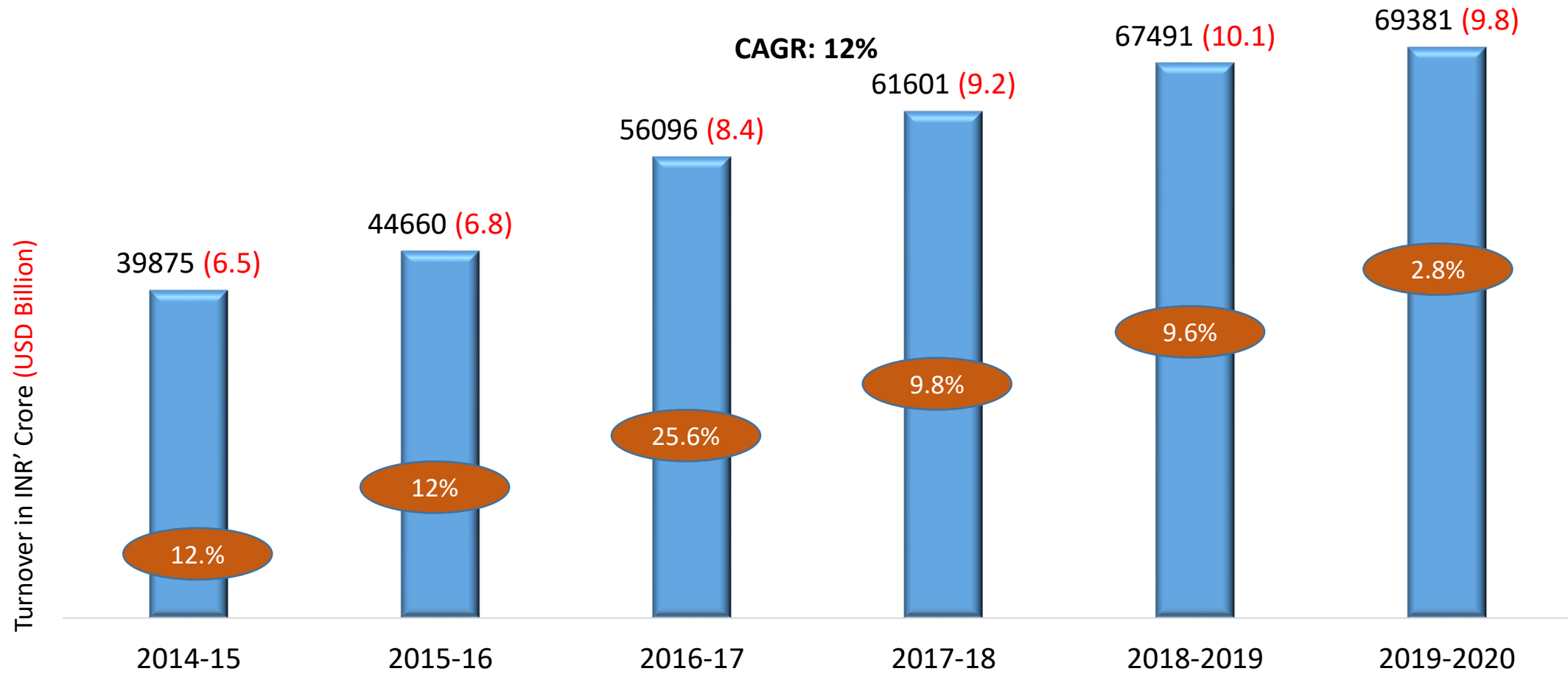


- Asia accounted for 65% of imports followed by Europe and North America at 26% and 8%
- Imports from Asia declined by 7%, from Europe by 22% and from North America by 17%.
- 89% increase from South Korea

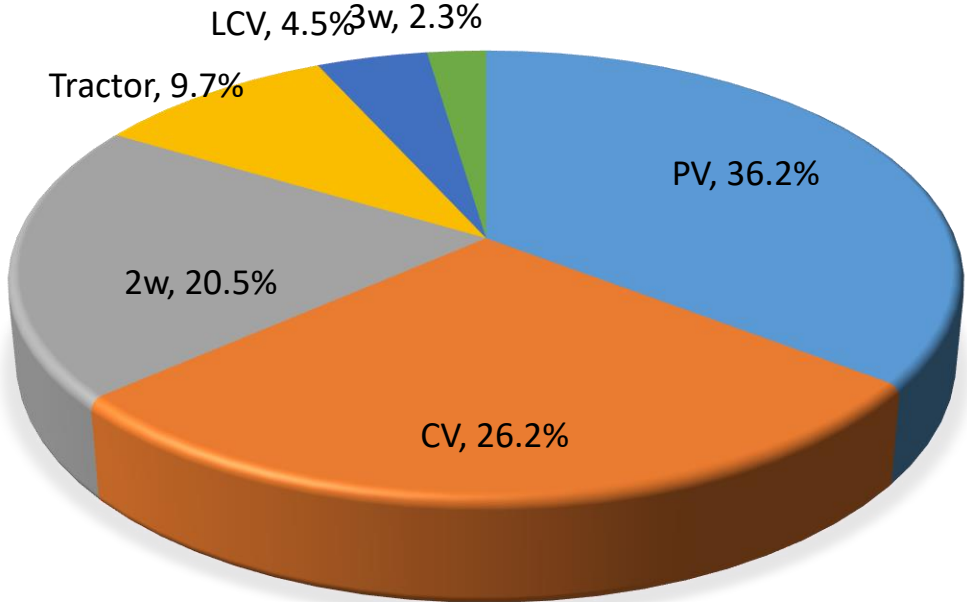


# Indian Automotive Aftermarket: 2019-20

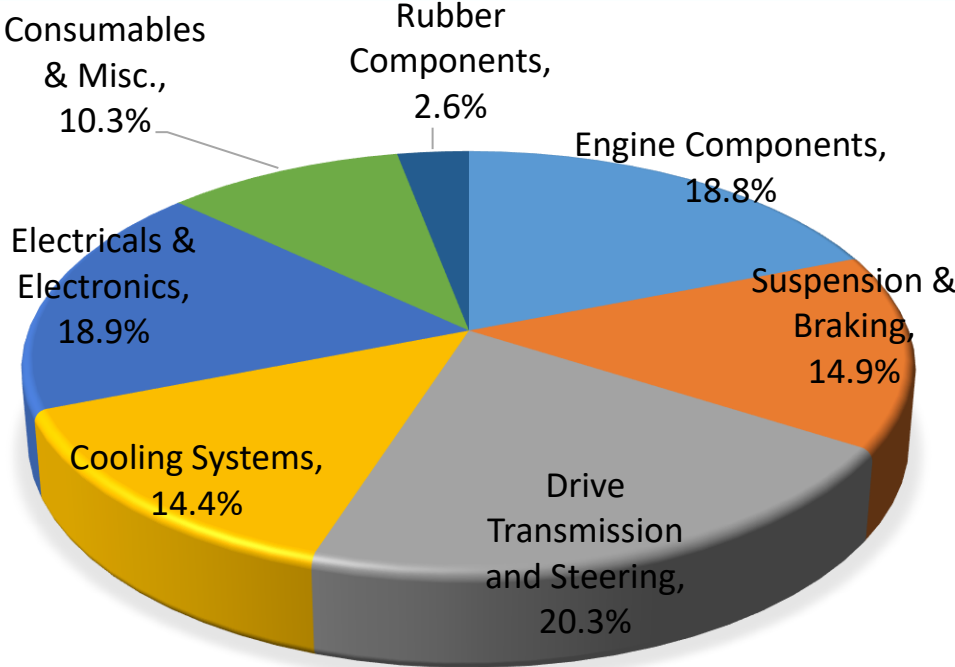
Growth rate in INR



# Aftermarket Revenue: Segmentation by product category



Aftermarket by Vehicle Segments



Aftermarket by Components

# We Invite you to the 60<sup>th</sup> ACMA Annaul Session (Virtual) on September 05, 2020

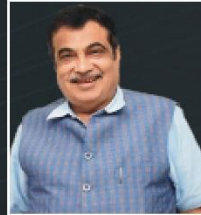
## Listen to Distinguished Leaders from the Government & Industry

**ACMA**

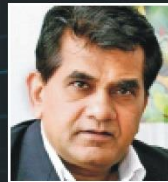
**60<sup>th</sup> Annual Session**  
(Virtual)  
**Shaping the New Normal**

0945 hrs; Saturday, 5<sup>th</sup> September, 2020

**Mr. Nitin Gadkari**  
Union Minister  
for Road Transport &  
Highways and MSMEs  
Government of India



**Mr. Piyush Goyal**  
Union Minister  
for Commerce & Industry  
and Railways  
Government of India



**Mr. Amitabh Kant\***  
CEO  
NITI Aayog



**Dr. Pawan Munjal**  
Chairman, MD & CEO,  
Hero MotoCorp



**Mr. O. Suzuki**  
Chairman  
Suzuki Motor Corporation



**Dr. Pawan Goenka**  
Managing Director  
Mahindra & Mahindra



**Mr. T. Suzuki**  
President & COO  
Suzuki Motor Corporation



**Mr. Kenichi Ayukawa**  
Managing Director & CEO  
Maruti Suzuki India



**Mr. Uday Kotak\***  
President, CII and  
MD & CEO  
Kotak Mahindra Bank



**Mr. Guenter Butschek**  
Managing Director  
& CEO, Tata Motors



*Thank You*

**ACMA**

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