



Automotive Component Manufacturers Association of India

Auto & Auto Components Industry – A Profile



About ACMA

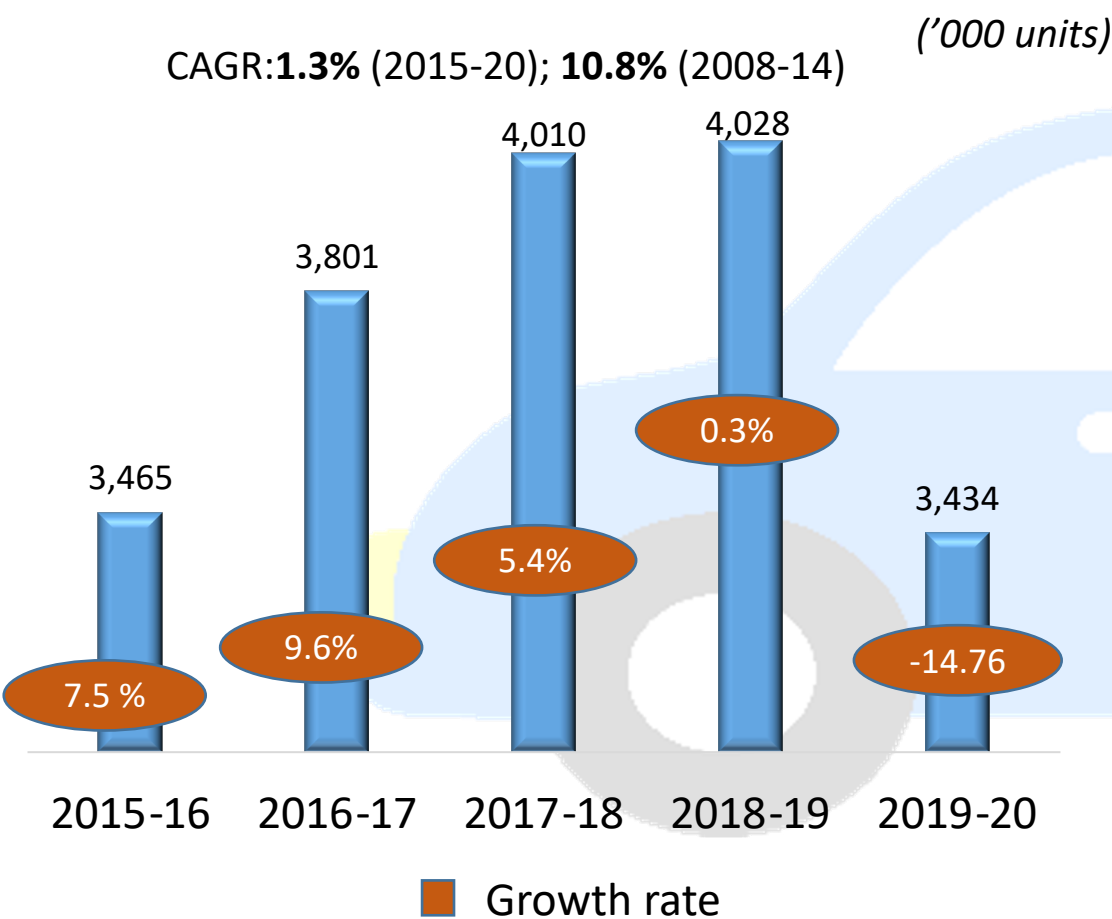
- Established in 1959
- Apex body of Auto Component Industry in India
- Over 850+ members from the Organized sector
- Represents 85% of the Industry by turnover
- Represented on all Strategic bodies - Government & Industry
- Offices across all Regions in the Country
- An ISO 9001-2015 Institution



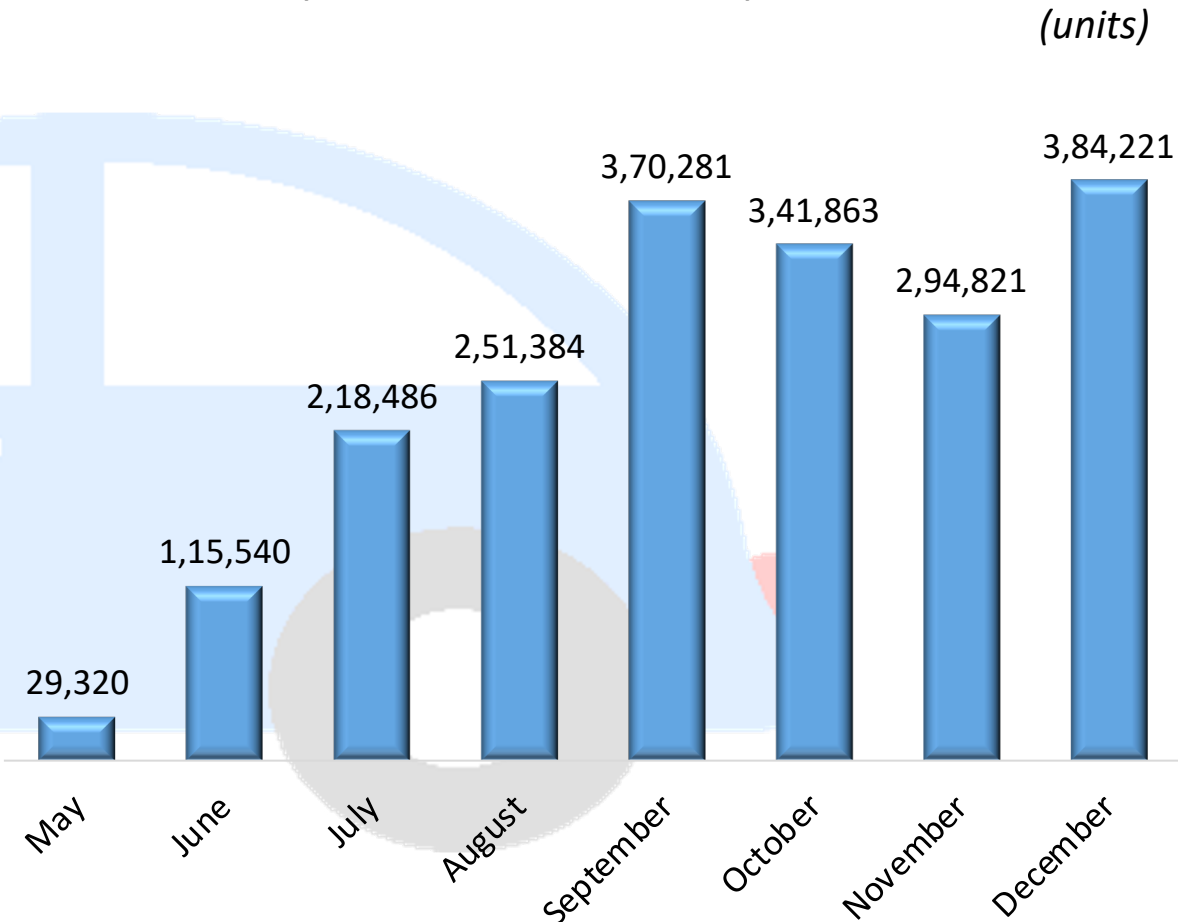
ACMA – Excellence in Service Delivery

Passenger Vehicles Production

Annual PV Production: 2015-2020



Monthly PV Production: May-Dec 2020



Cumulative Production

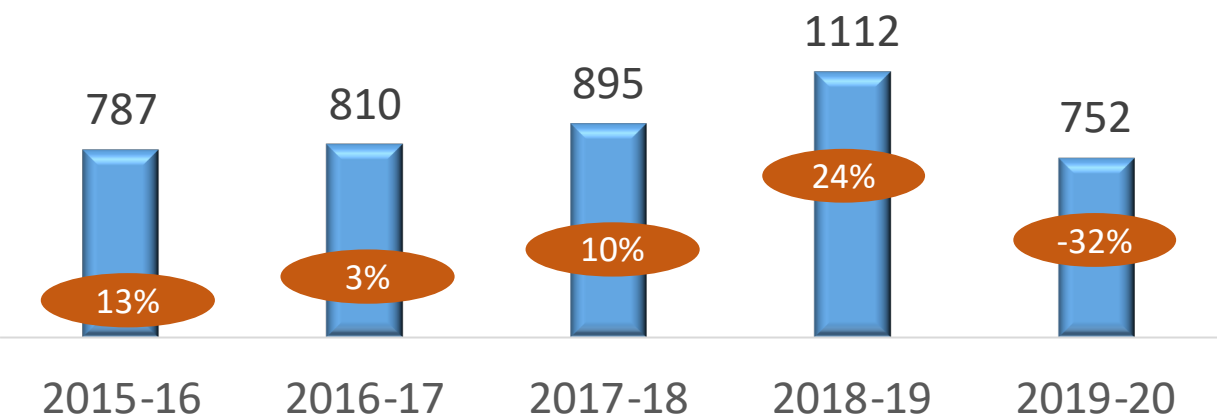
Apr-Dec 2019	Apr-Dec 20	Growth
25,94,005	20,05,916	- 23%

Source: SIAM

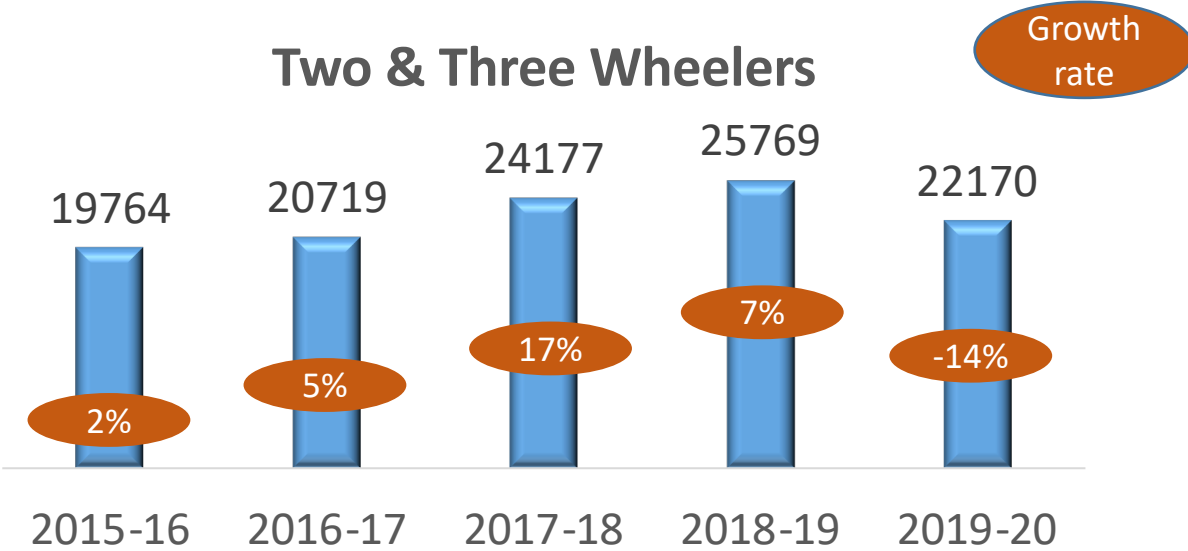
Other Vehicles Production

All figs in '000 units

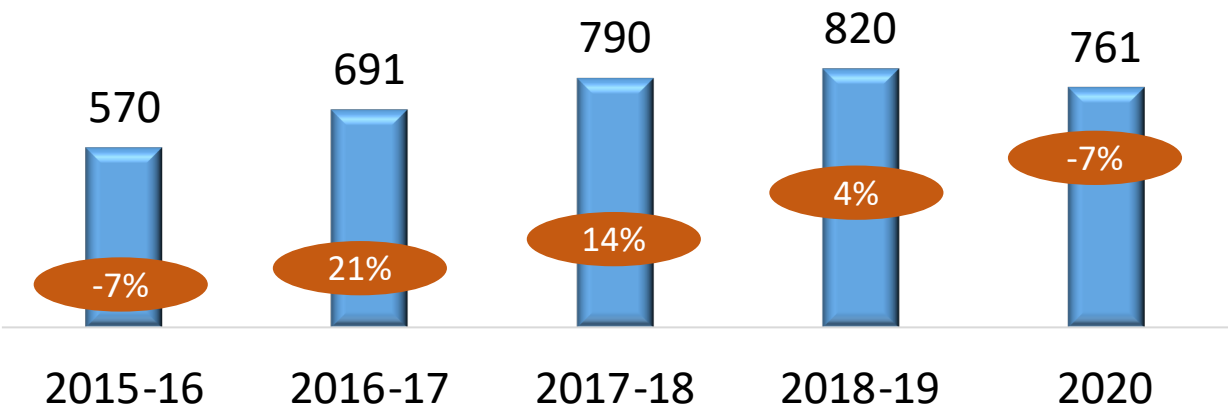
Passenger + Goods Carriers



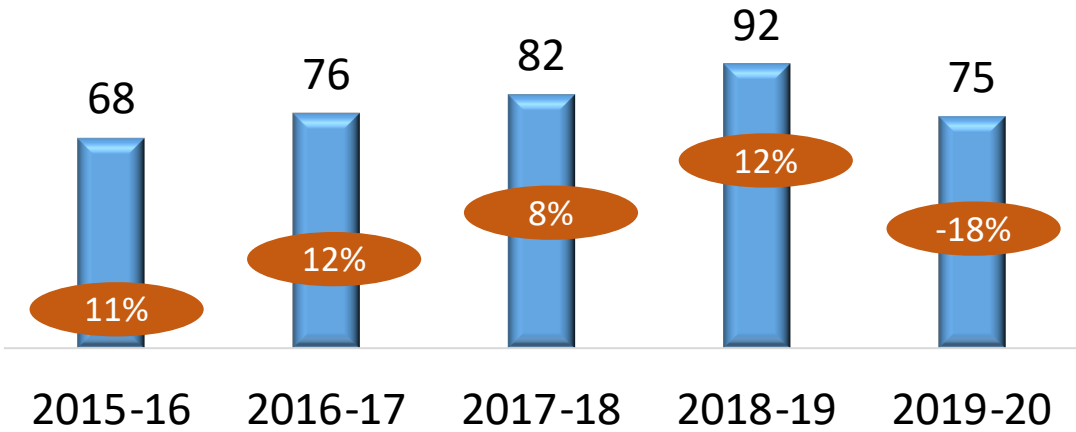
Two & Three Wheelers



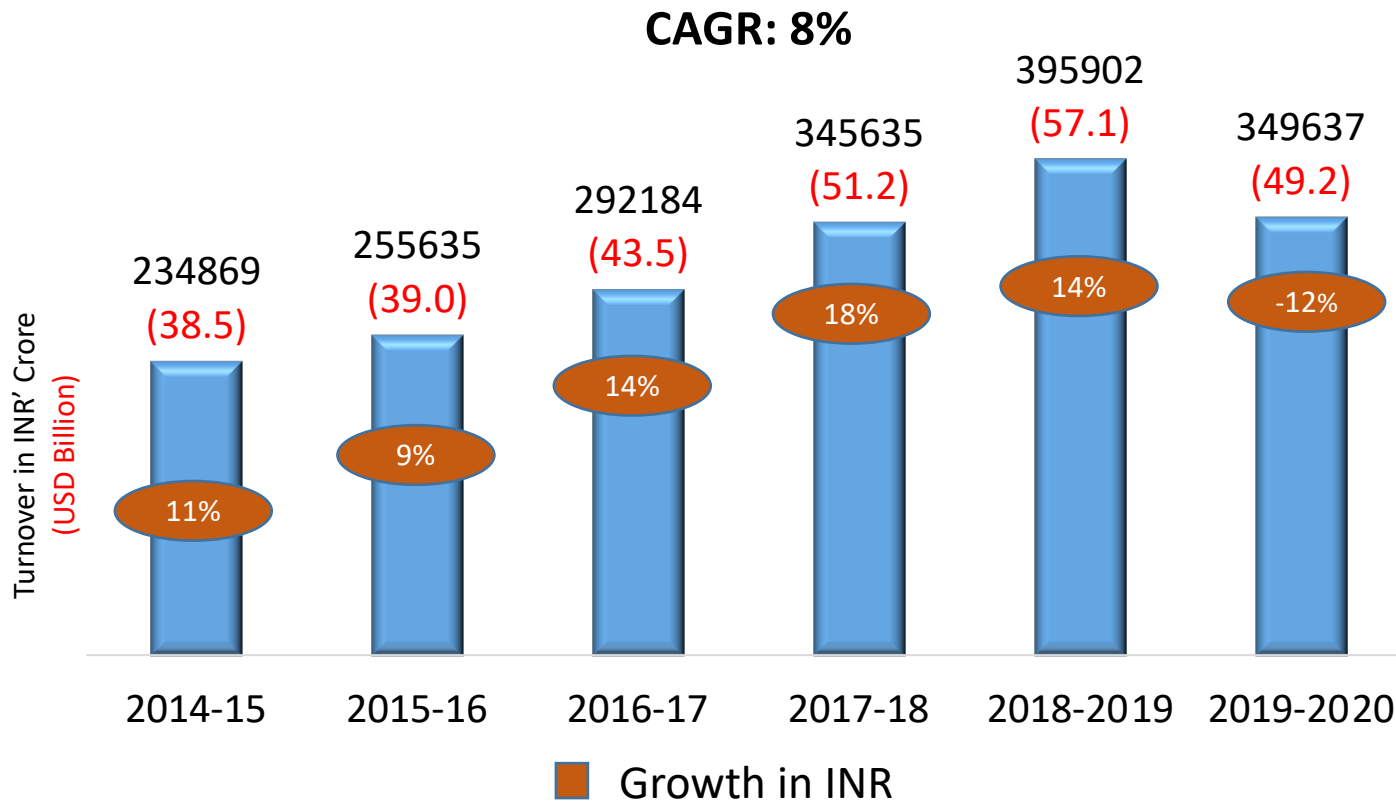
Tractors



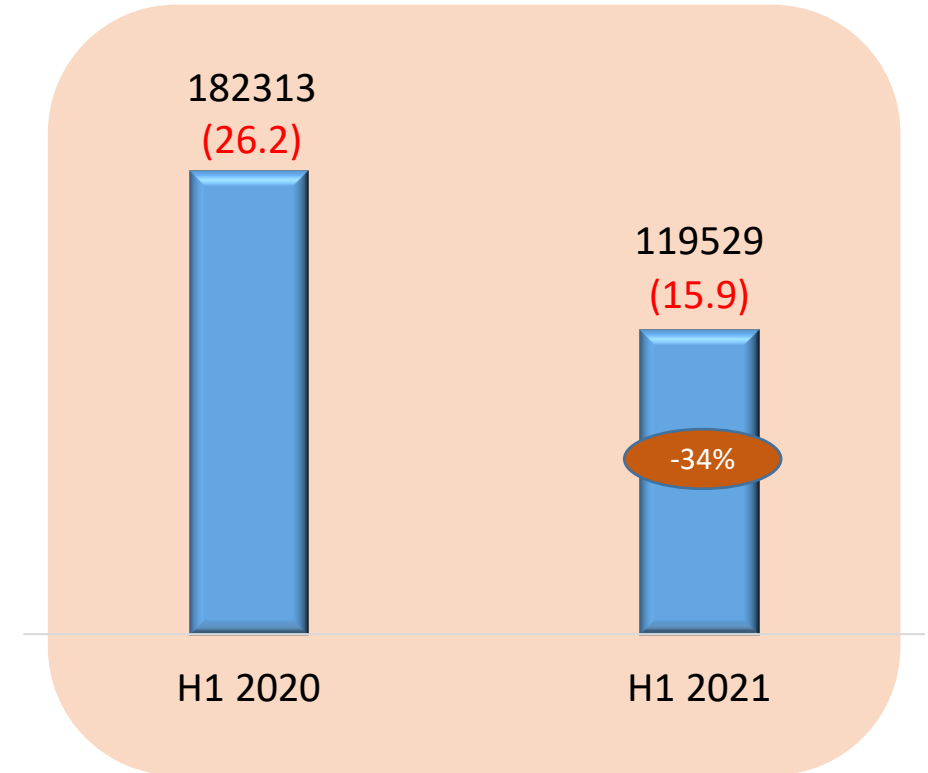
Construction Vehicles



Auto Components Industry Performance: H1 FY 2021



- Indications of vehicle demand sustaining post the festive season
- Industry cautiously optimistic about near to mid-term future



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

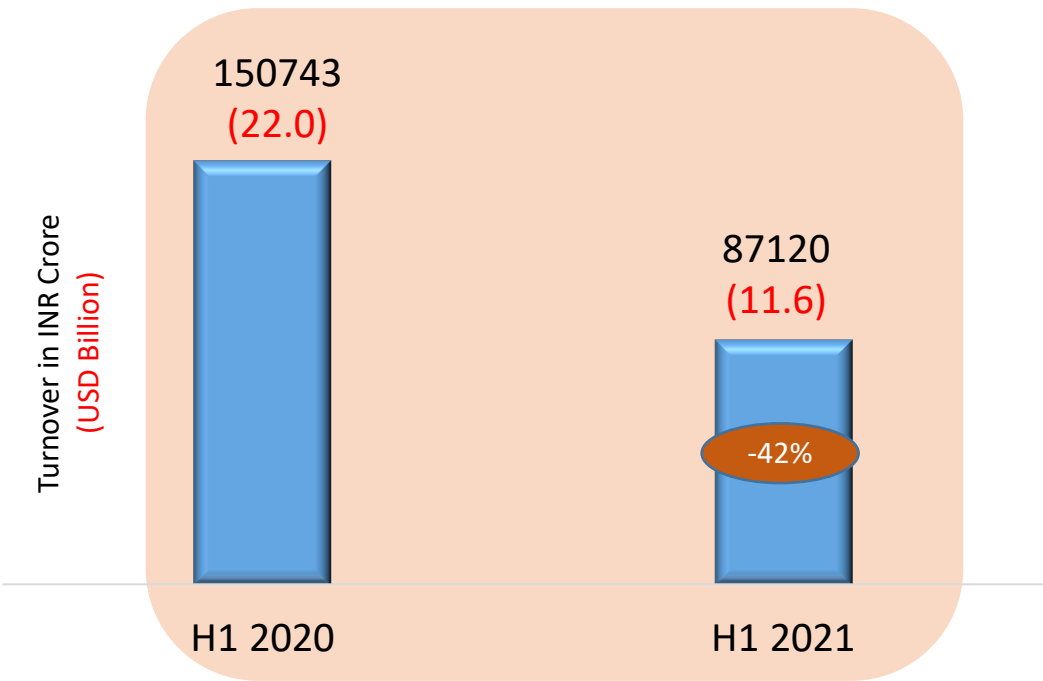
Conversion rate:

1 USD - INR 75.0 (H1 2021)

1 USD - INR 68.5 (H1 2020)

Auto Components Supply to OEMs: H1 FY 2021

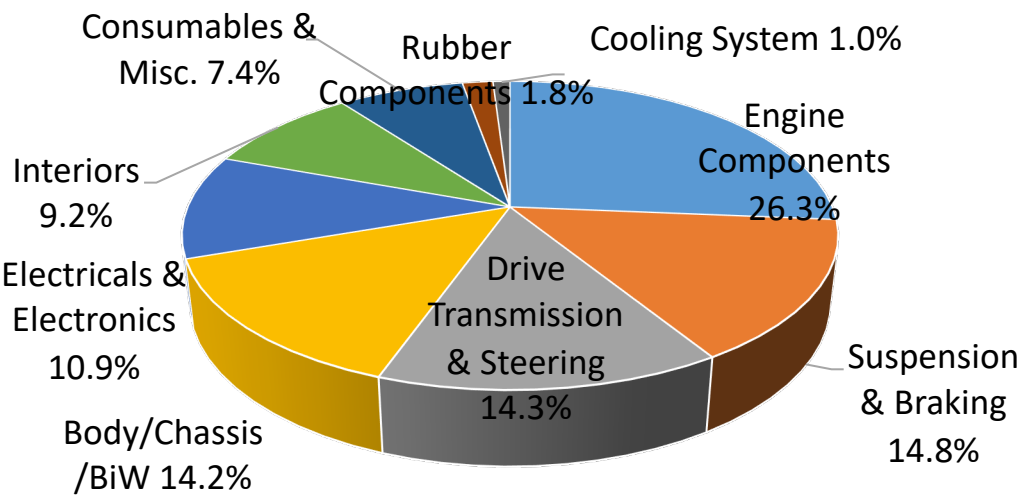
OEMs Purchase



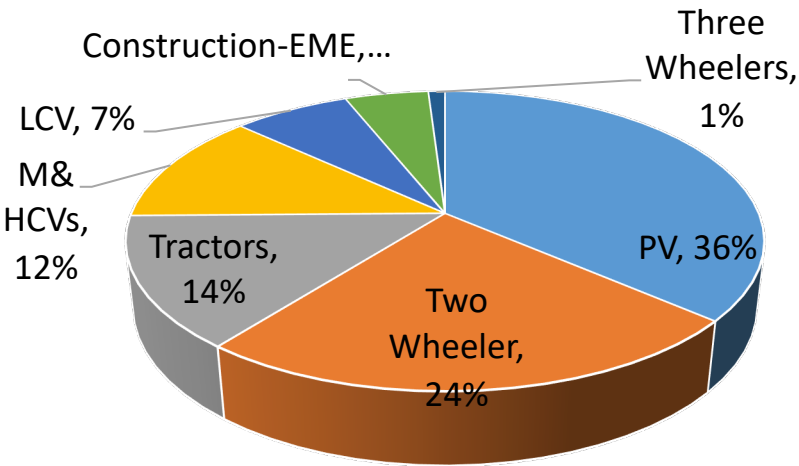
Definition:

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

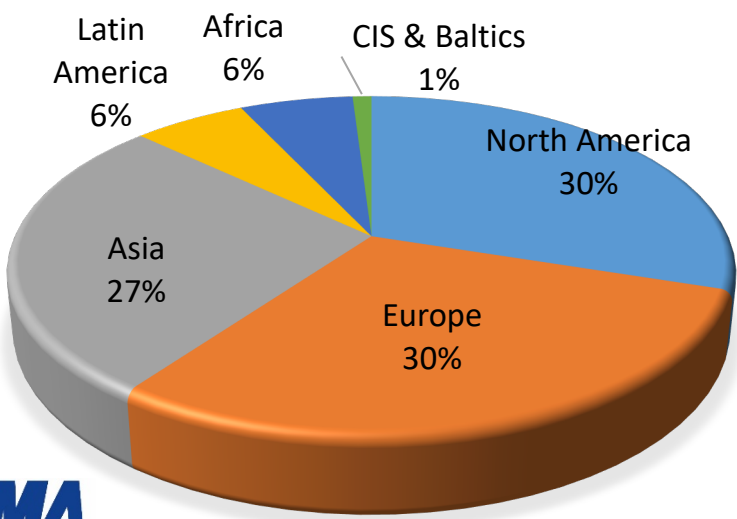
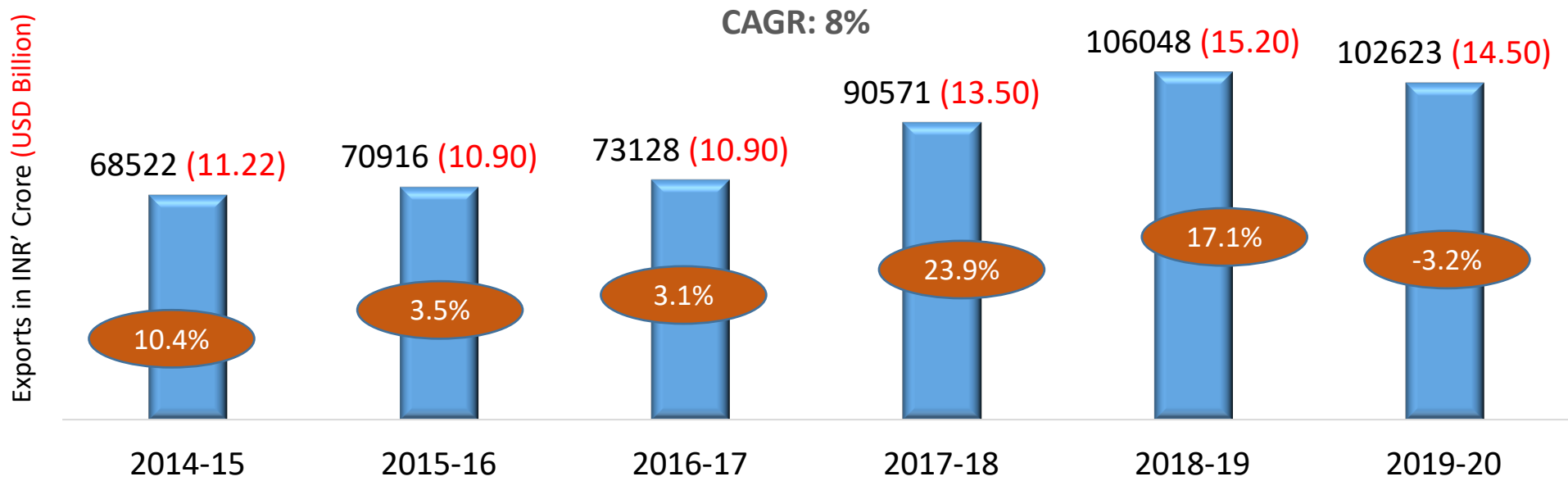
Component sales by category:



Component sales by segment:



Exports – Auto Component Industry: 2019-20



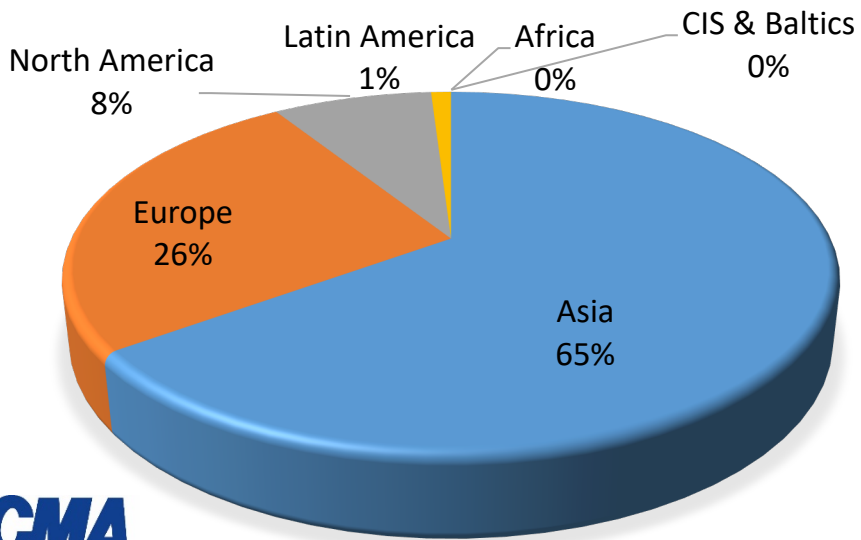
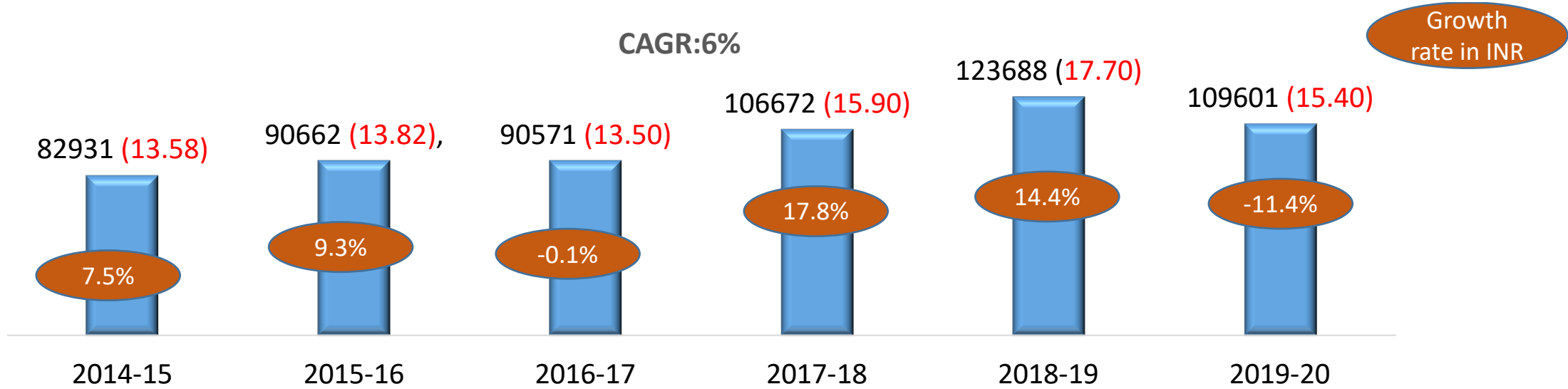
Export Destinations: Top 10 Countries in %

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

61%

Imports – Auto Component Industry: 2019-20

Imports in INR' Crore (USD Billion)



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%

Budget Outcomes & Govt. Support

Positive Budget Outcomes

- Significant outlay for vaccination
- Enhanced spend on road infrastructure
- Voluntary Vehicle Scrappage Policy
- Thrust on Rural/Agricultural Infrastructure
- PLI for 13 sectors including Auto
- Doubling of outlay for MSMEs
- Increase in Basic Customs Duty for select auto components

Govt. Support

- Auto PLI
- Thrust on Exports – net surplus
- Thrust on Localization
- FAME-II

FY21-22: Outlook for Auto Component Industry

- FY21-22: Year of recovery; expected growth 15-20%

Tailwinds:

- Global GDP growth in 2021 5.5%; India 11% (IMF)
- Vaccination - hope & confidence
- V-shaped recovery in auto & others
- Positive Policy Measures – Auto PLI

Headwinds:

- Sustainability of demand & economic recovery
 - Increasing Commodity Prices
 - Logistics Challenges – availability of containers
 - Semiconductors availability
- Resurgence of pandemic

We hope for a Positive growth Curve for the Next 5 Years!



Thank You

ACMA

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