

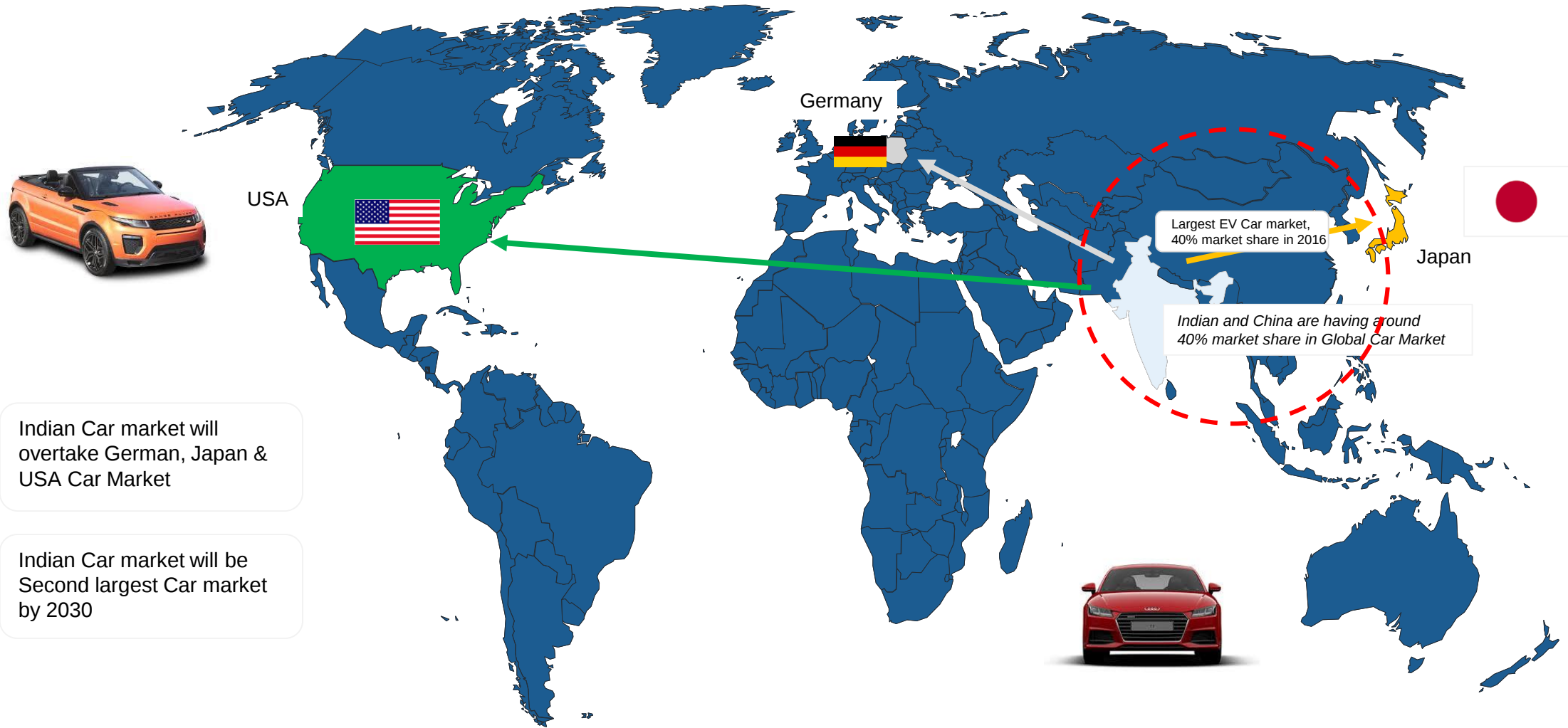
Indian PV Product and Market Analysis



Our Global Clients

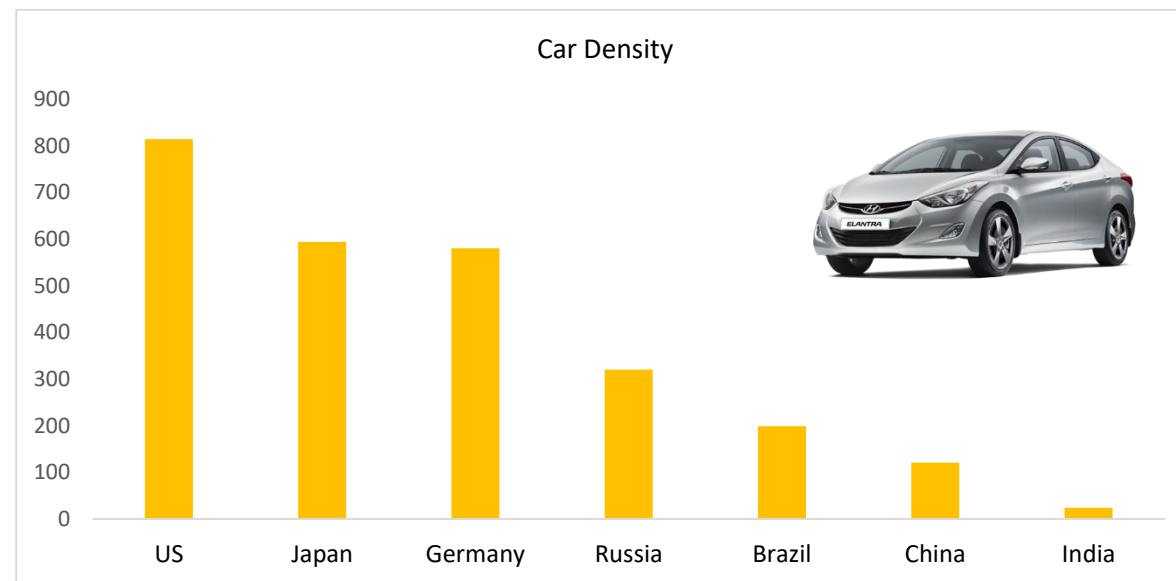
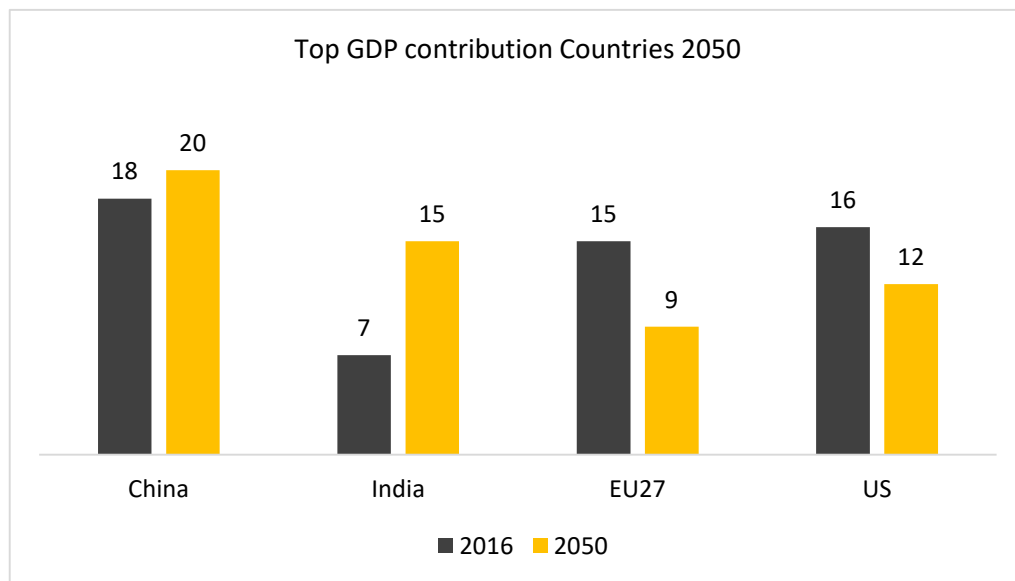


India will be second largest Car Market by 2030



Source: ACG Databank

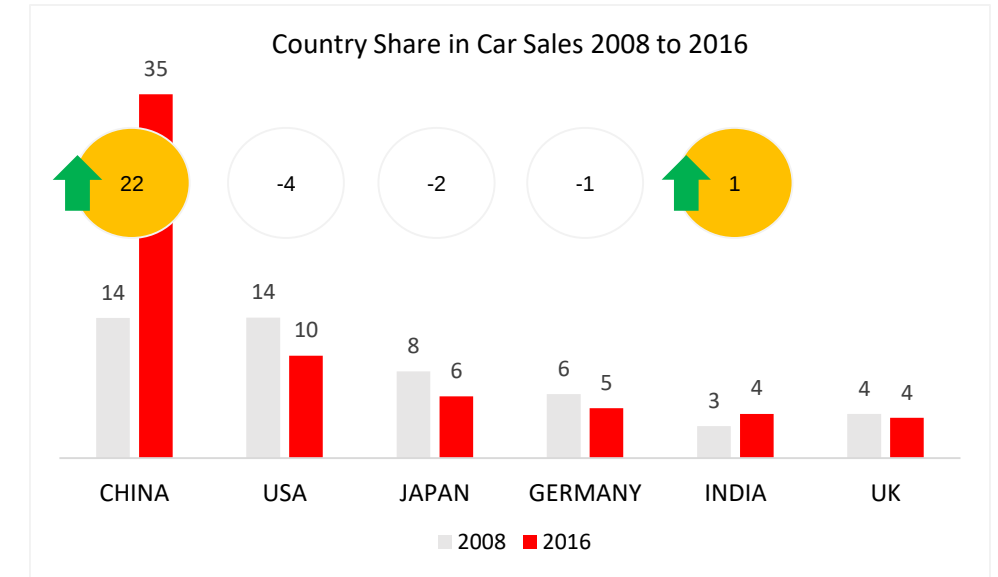
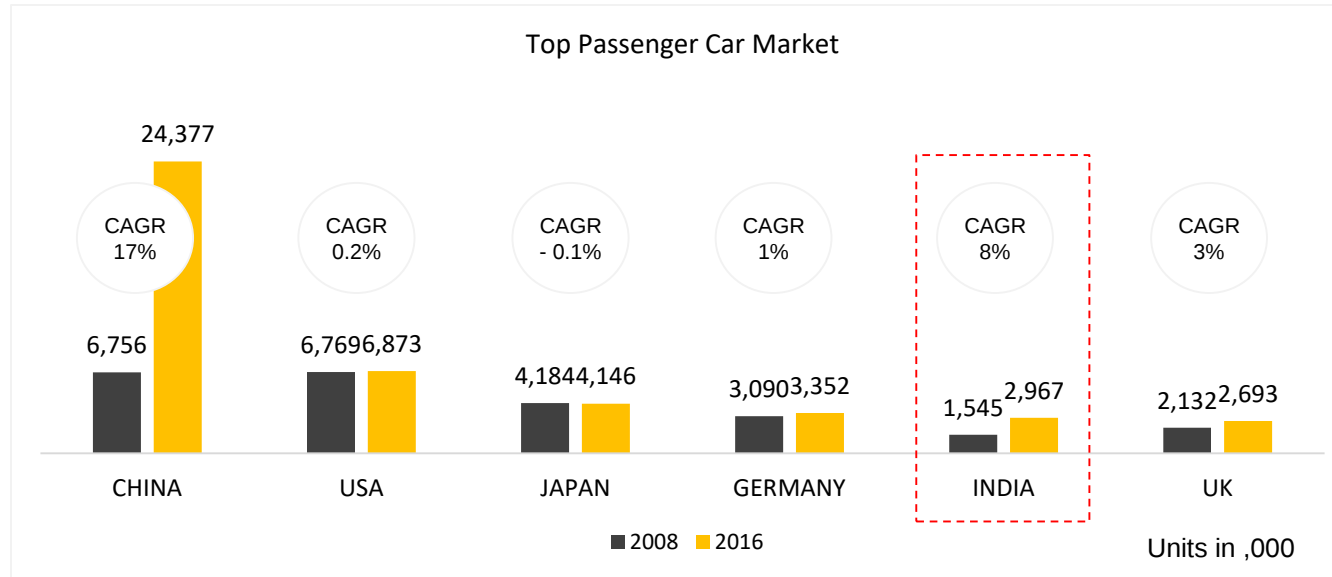
GDP Forecast and Car Density



- Indian Economy will be second largest economy by 2050 after China
- It will contribute 15% in 2050 from 7% in 2016
- In terms of Car density, India is at 7th place after Japan, Germany and even Brazil

Source: World Bank, : Morgan Stanley, ACG Databank

Top Global Passenger Car Markets



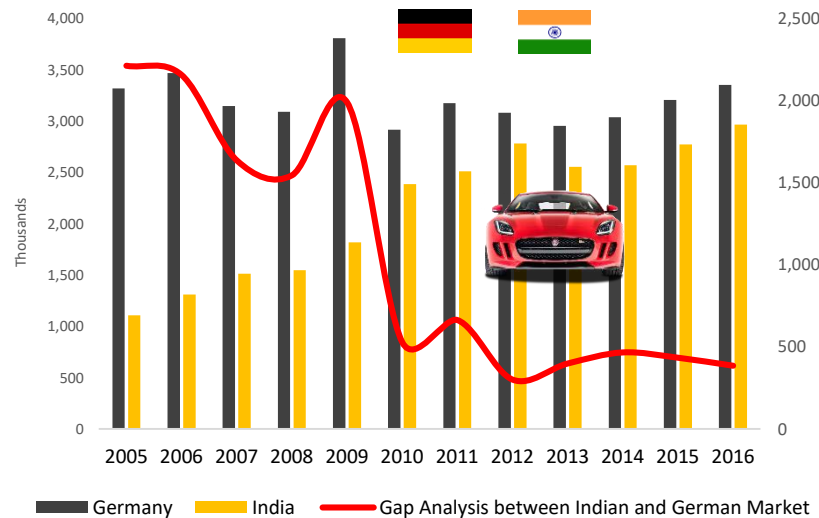
- China is the largest car market with CAGR of 17% in last 10 years
- Indian is currently 5th largest car market with CAGR of 8% from 2008 to 2016

Source: ACG Databank

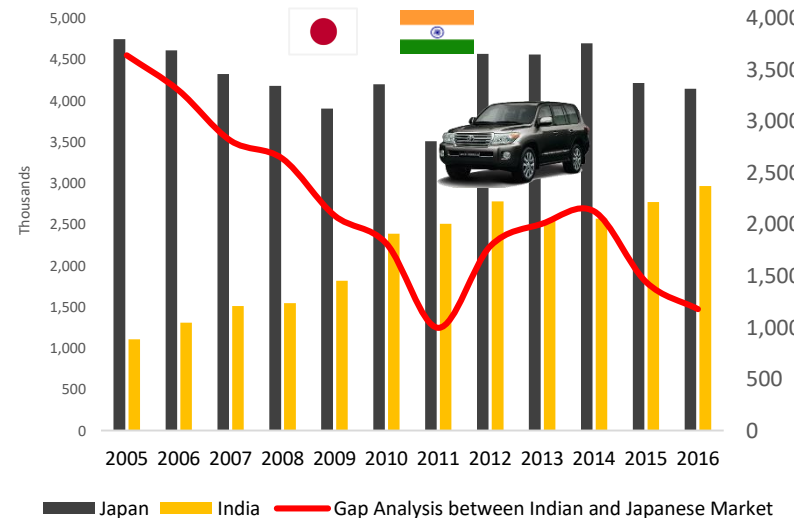
Top Market Trend Analysis

India, Germany, Japan and USA

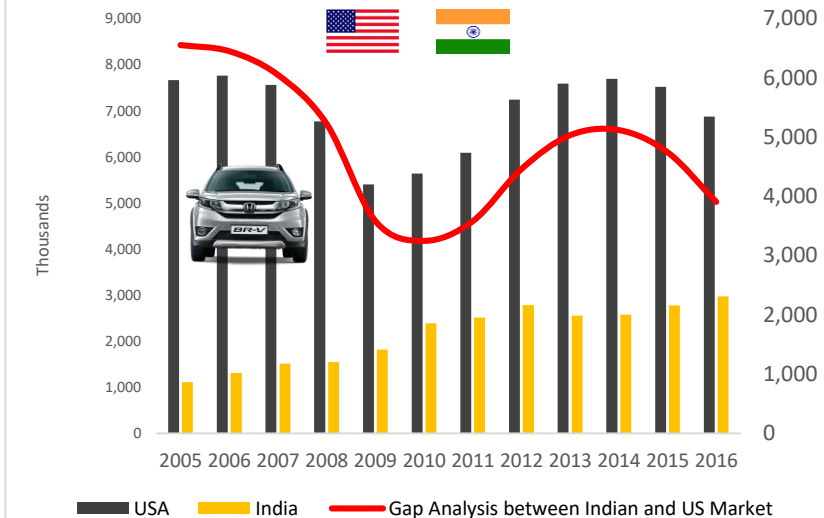
Indian and German Market Trend Analysis



Indian and Japanese Market Trend Analysis



Indian and US Market Trend Analysis



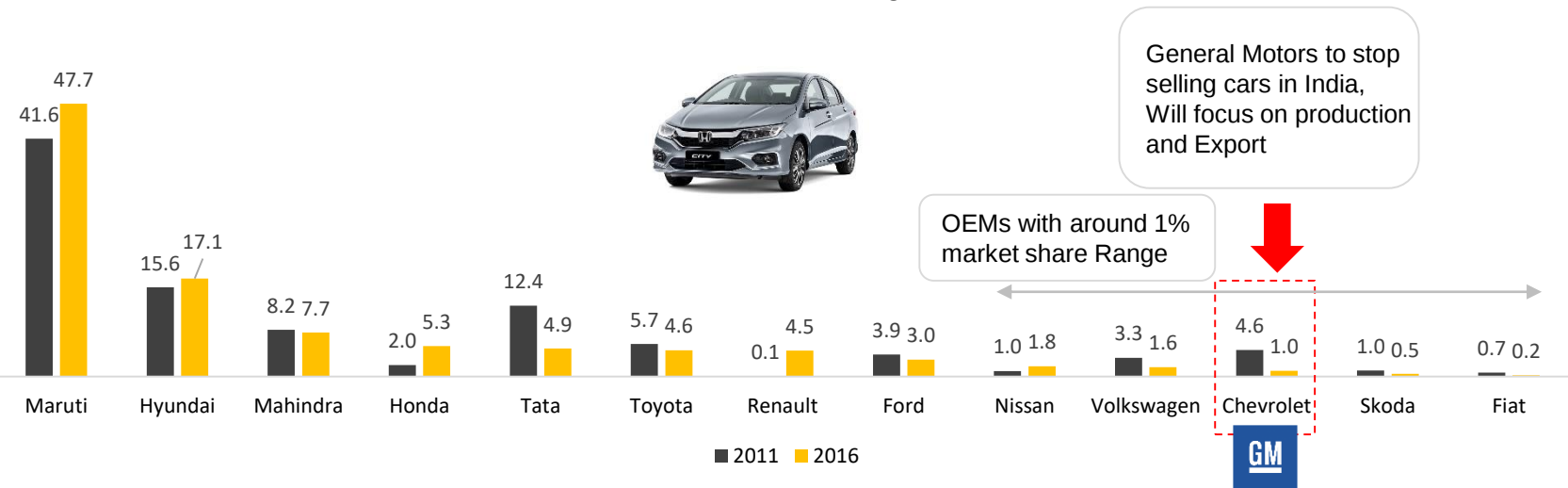
- The Car volume difference between India, Germany and Japan are minor only
- Indian market is dominated by Economy class vehicle segment, and Japan and Germany market are dominated by premier segment vehicle

Source: ACG Global Car Report 2016

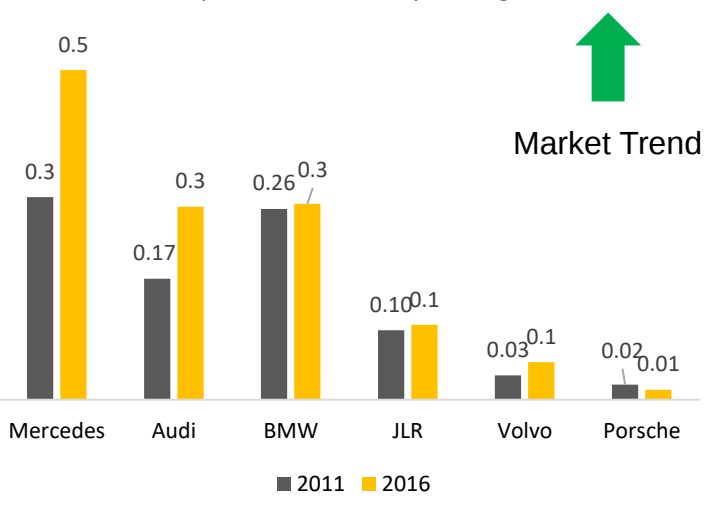
Indian PV Market Share

OEMs Overview

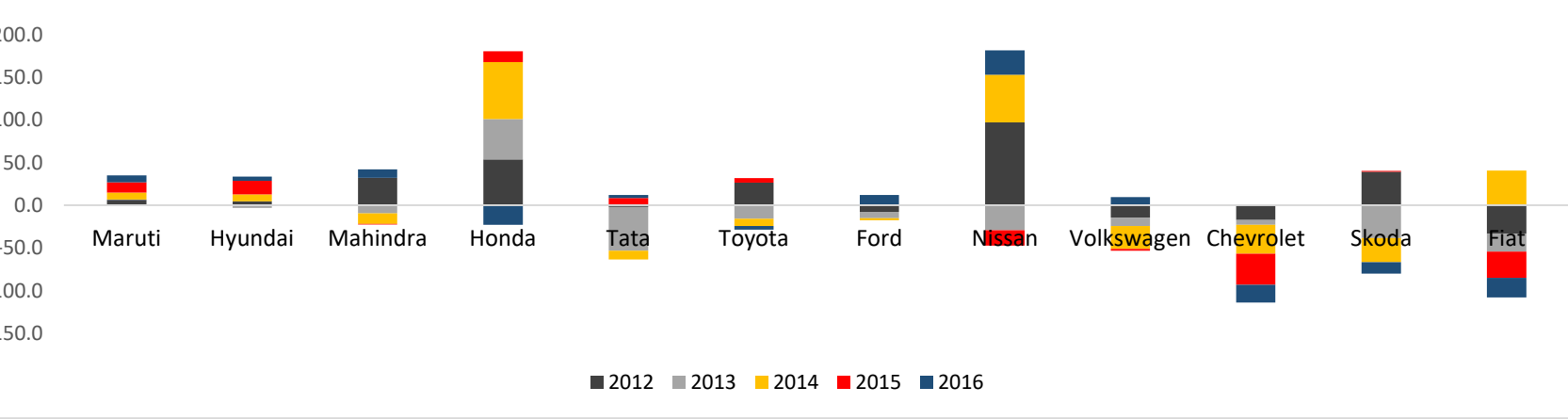
OEM Market Share PV Segment



OEMs presence in Luxury PV Segment



Growth rate OEM wise

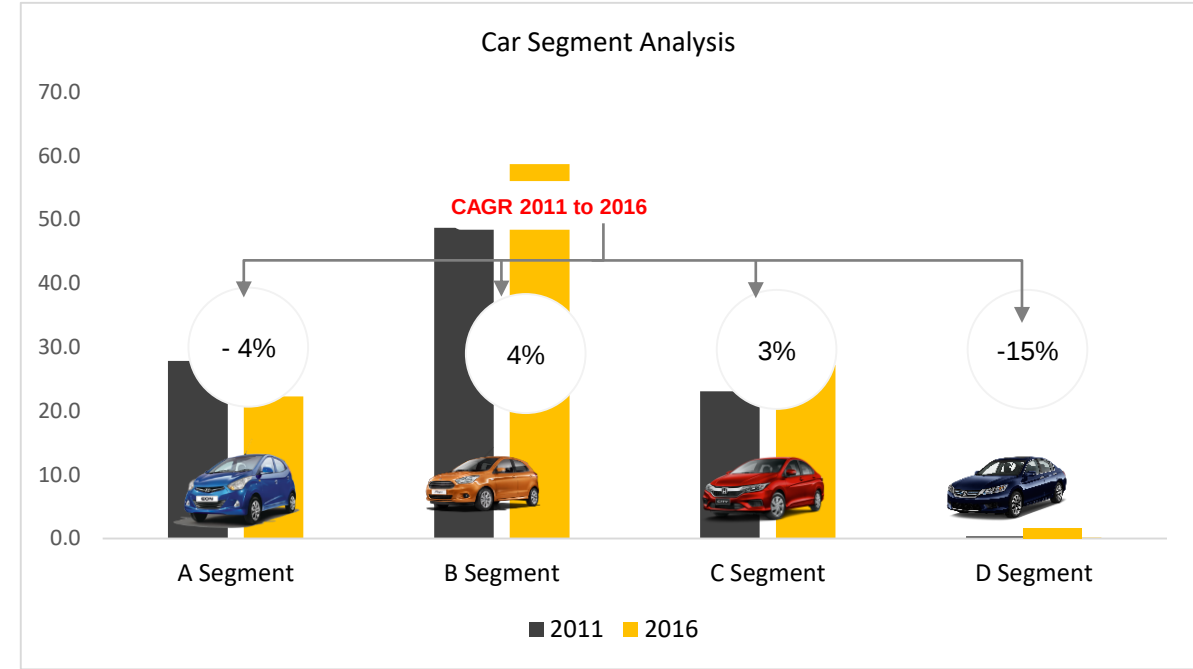
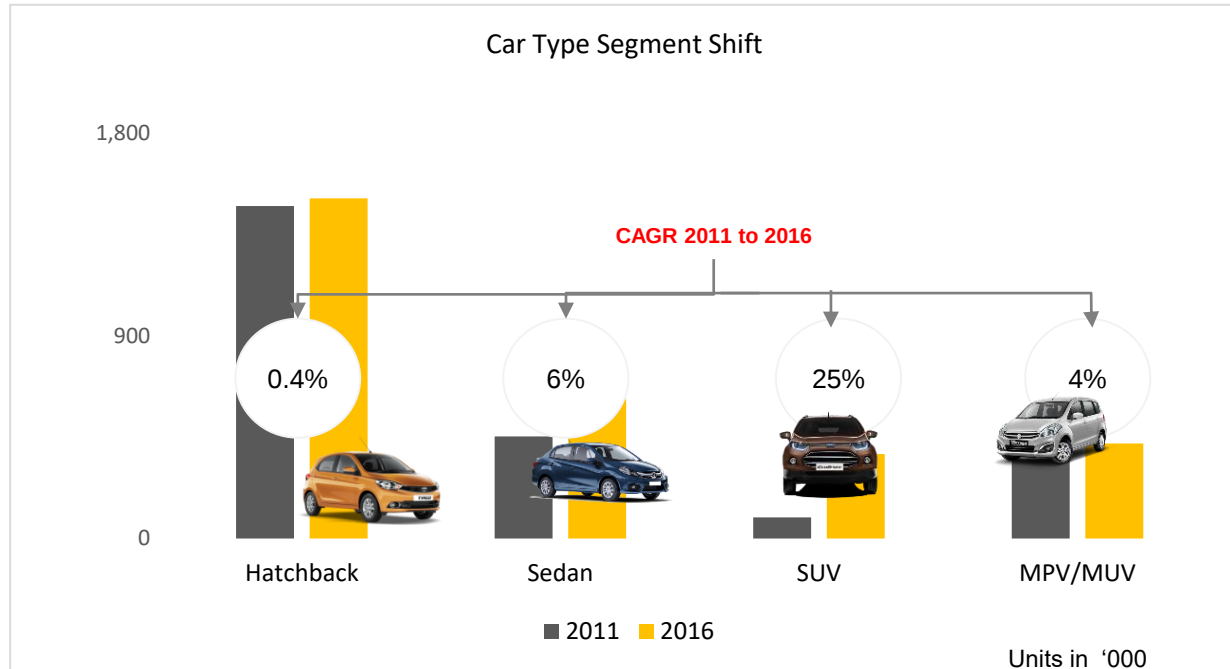


- Maruti, Hyundai, Honda, Renault, and Nissan gained market Share in last 5 years.
- Mahindra, Tata, Toyota, Ford, Volkswagen, Chevrolet, Skoda, and Fiat lost market share from 2011 to 2016.

Source: ACG Databank

Car Segment Analysis

Car Body type



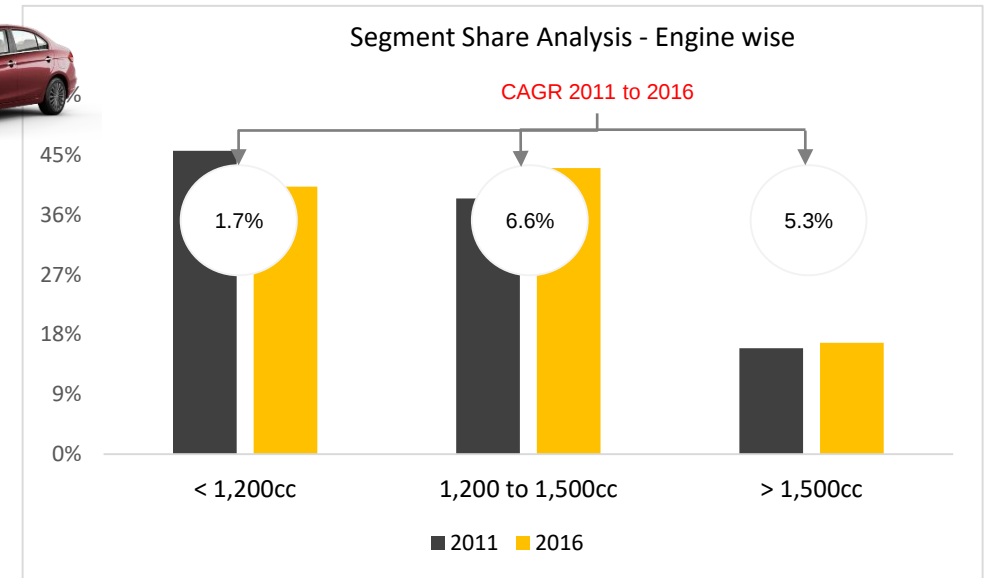
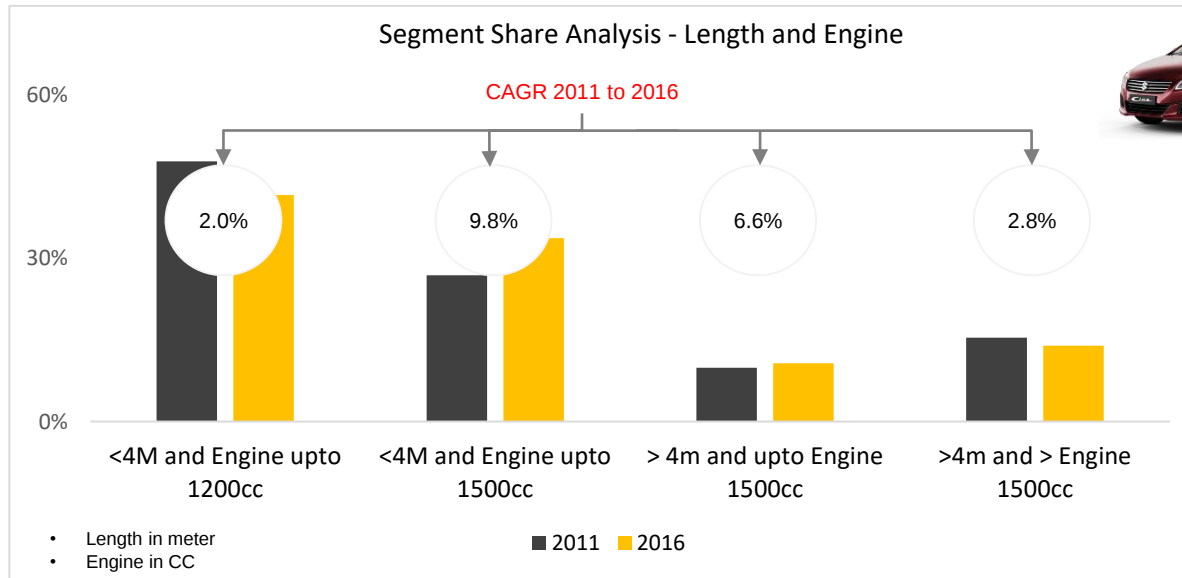
- Hatchback and B Segment are largest car segment in India

Segment wise Sales and Production Forecast data is available till 2030

Source: ACG Databank

Car Segment Analysis

Vehicle length and Engine

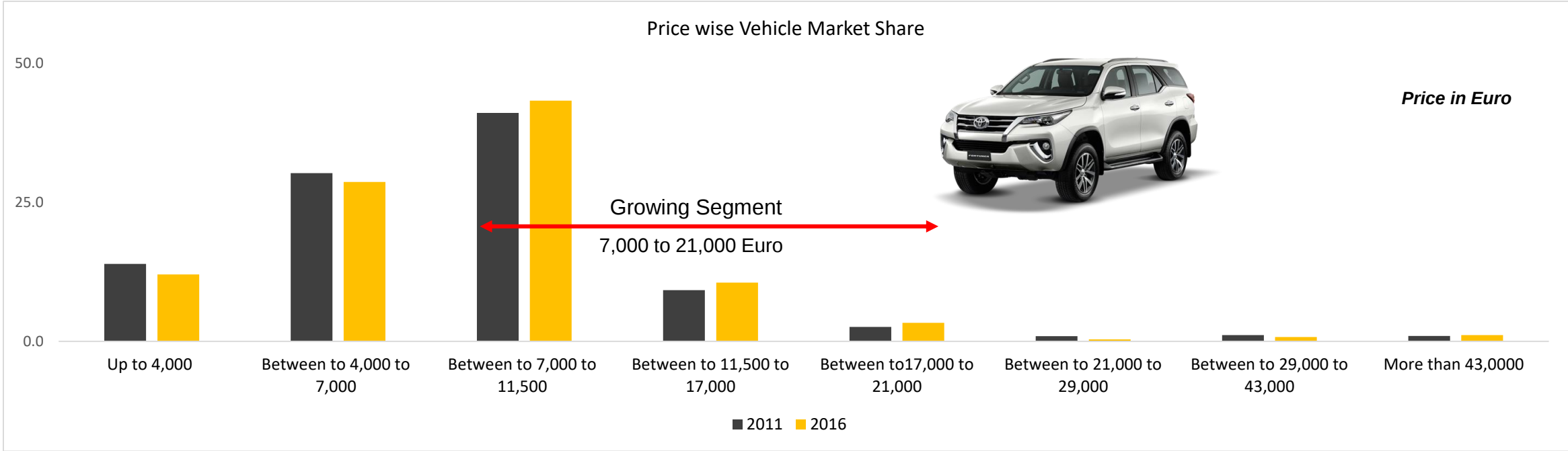


- Less than 4m and Up to 1,200cc segment is the largest segment with CAGR of 2 percent from 2011 to 2016
- Less 4m and up to 1,500cc segment is growing category of vehicle with 9.8 percent CAGR

Source: ACG Databank

Car Segment Analysis

Price wise Segment Share



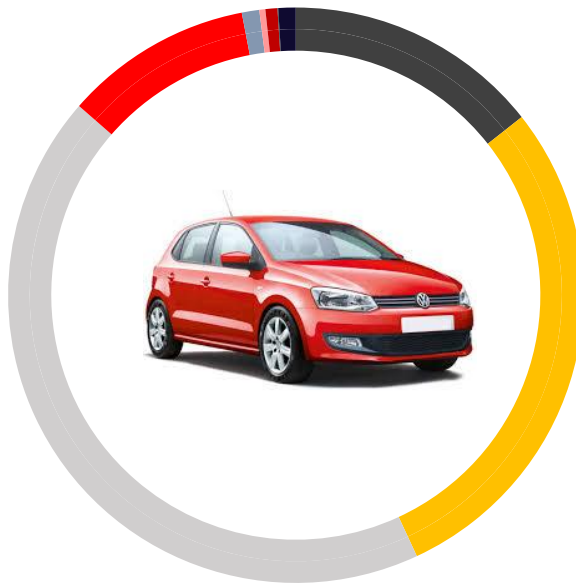
- Price between 7,000 to 11,500 Euro is the largest car segment volume

Source: ACG Databank

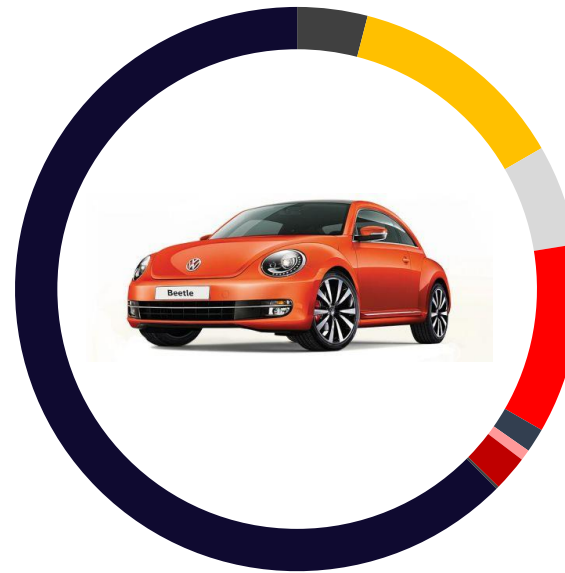
Car Segment Analysis

Volume By Units and Value

PV Segment share by Volume



PV Segment share by Value in Euro

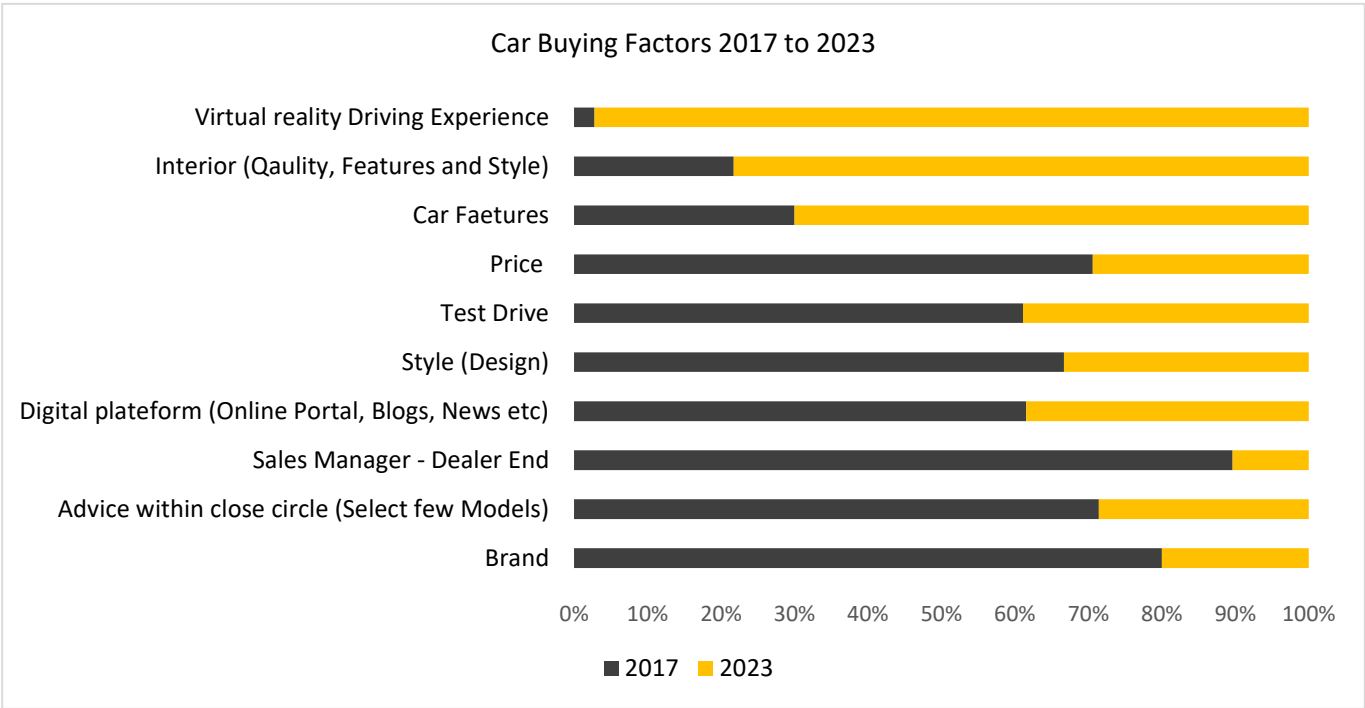


Prices in Euro

- Up to 4,000
- Between 4,000 to 7,000
- Between 7,000 to 11,500
- Between 11,500 to 17,000
- Between 17,000 to 21,000
- Between 21,000 to 29,000
- Between 29,000 to 43,000
- Between 43,000 to 58,000
- More than 58,000

- Largest volume in units: 7,000 to 11,500 Euro
- Largest volume in value: More than 58,000 Euro

Source: ACG Databank

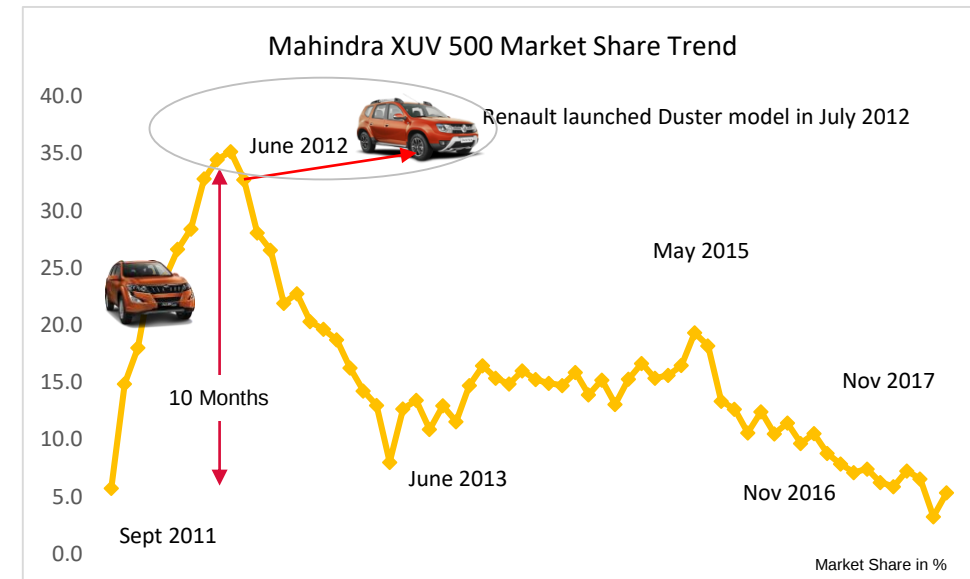
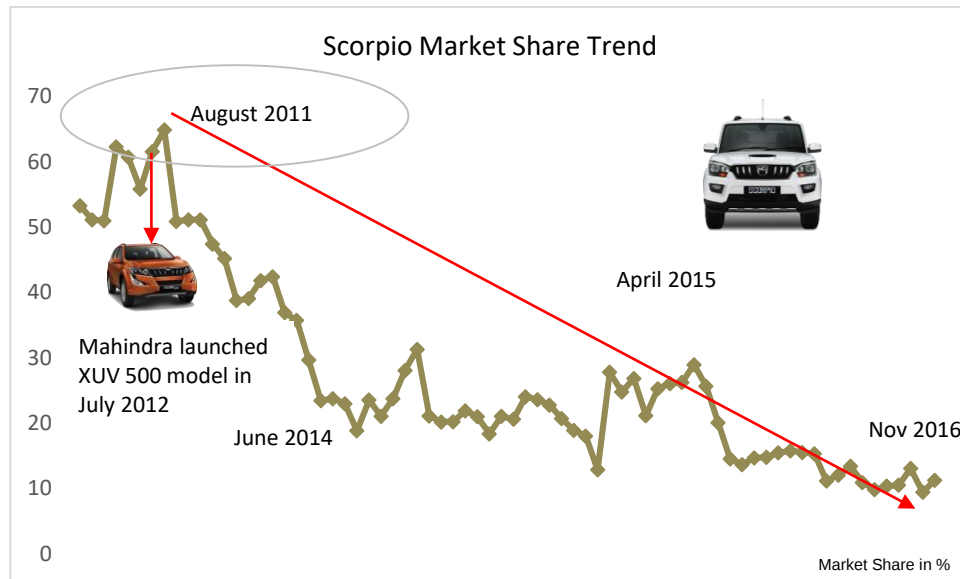


- Virtual reality driving technology will play key role by 2023 to influence buyers decision
- Interior design will be second most important criteria

Source: ACG Databank

Product Strategy

Mahindra SUV Model level Analysis

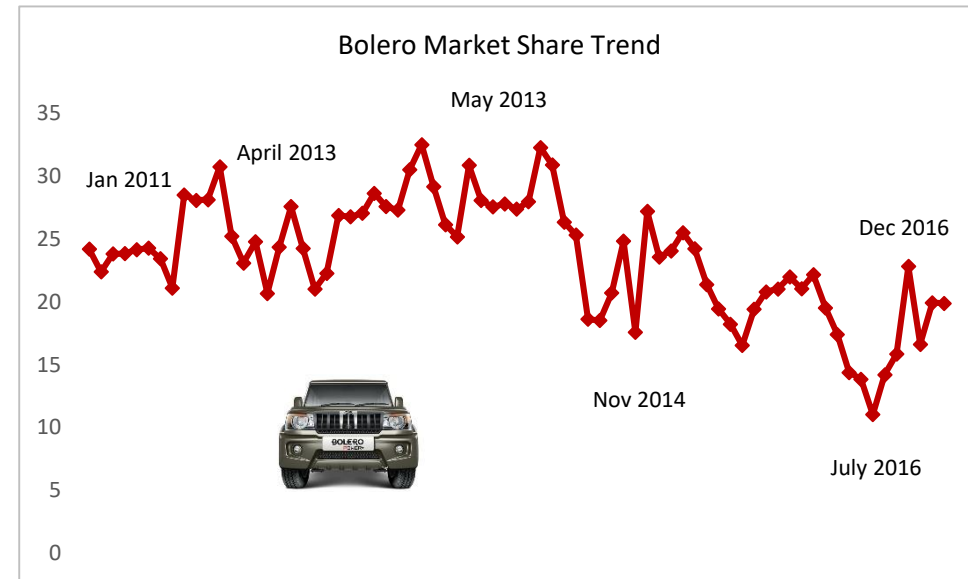
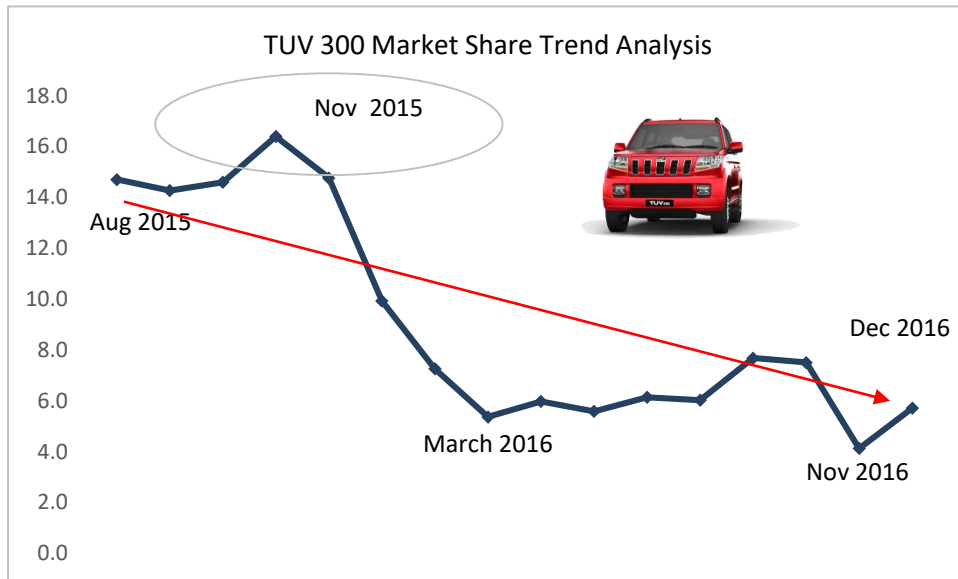


- Maruti and Tata are going to give tough competition to Mahindra in this segment with their strong product portfolio

Source: ACG Databank

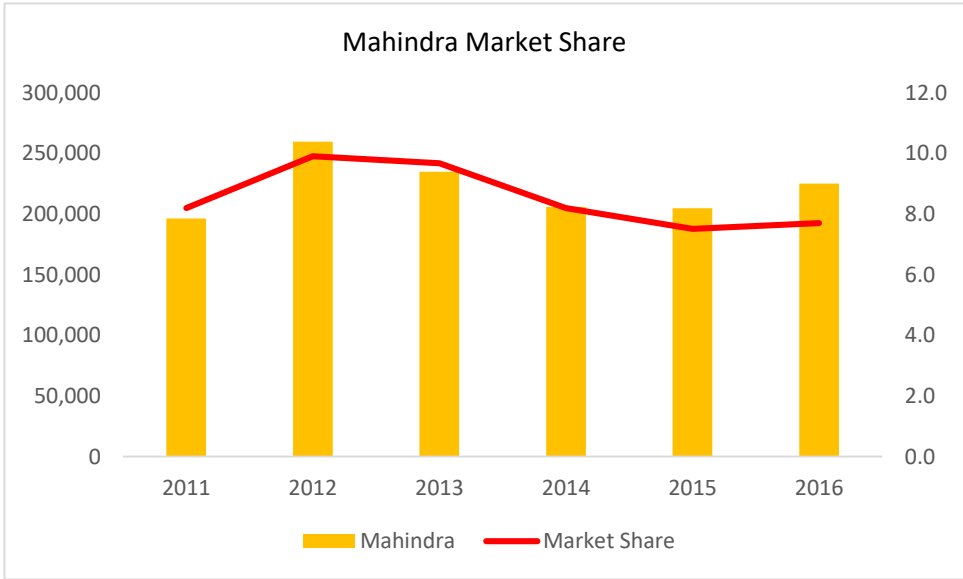
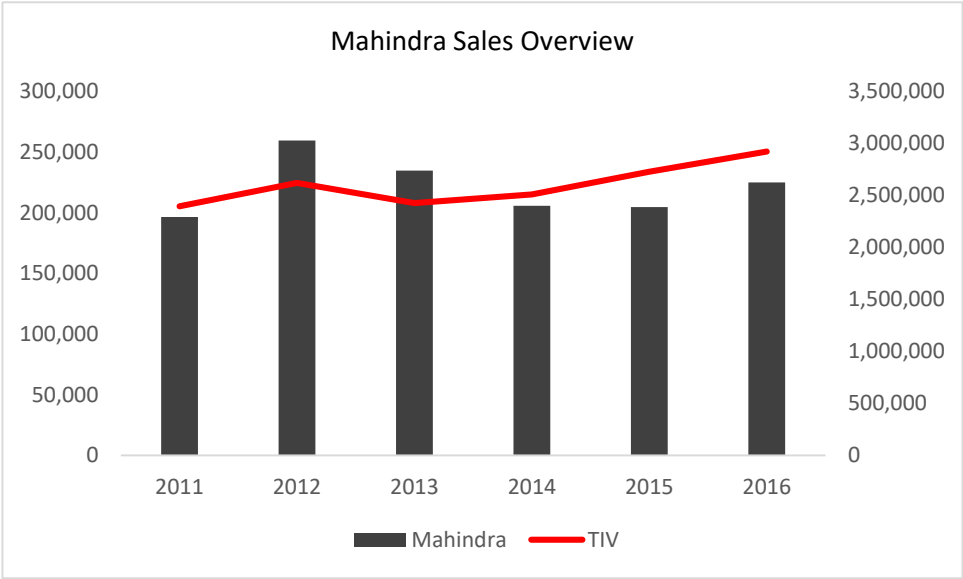
Product Strategy

Mahindra SUV Model level Analysis

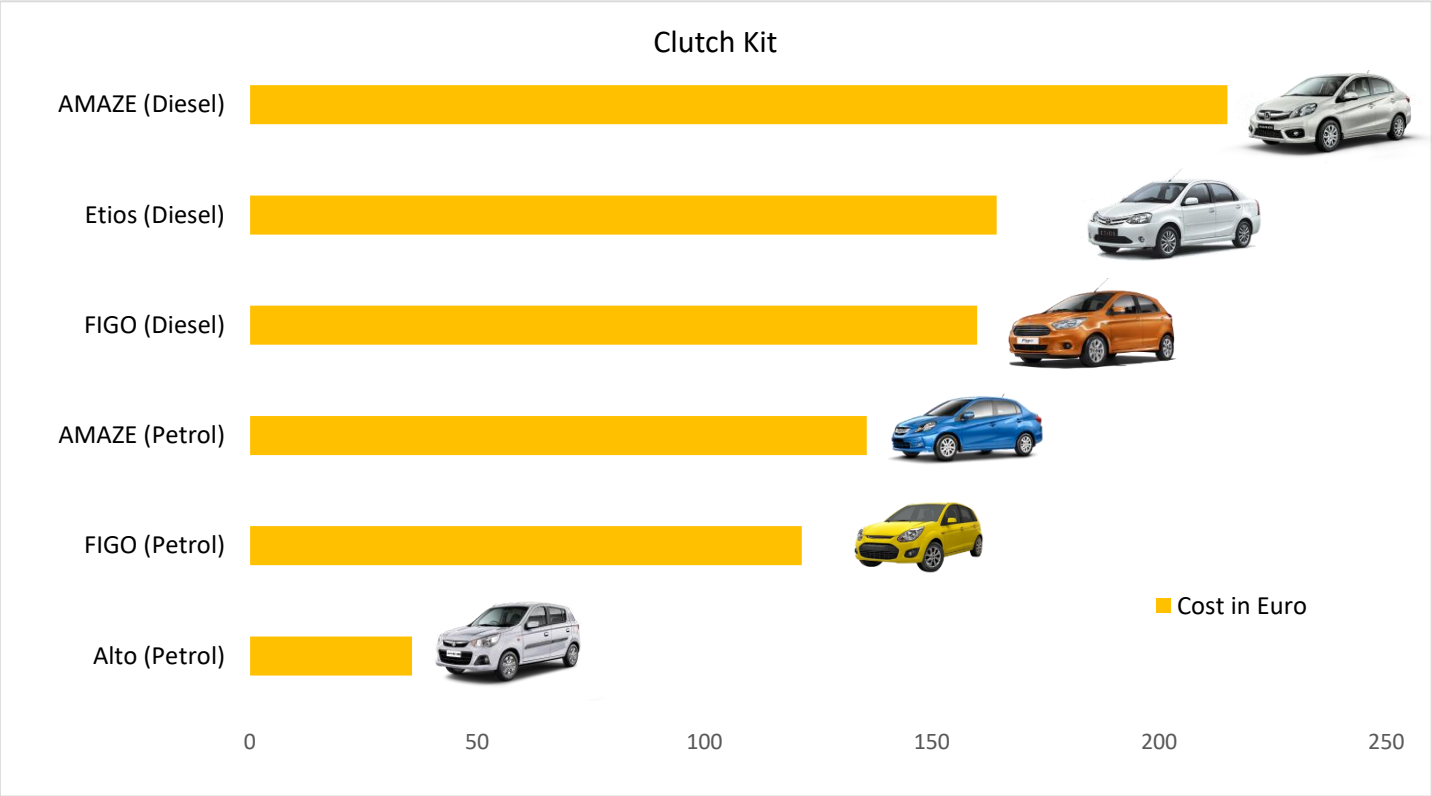


- TUV 300 lost quantum market share since its launch
- Bolero also lost minor market share

Source: ACG Databank



Source: ACG World Truck Year Book 2017



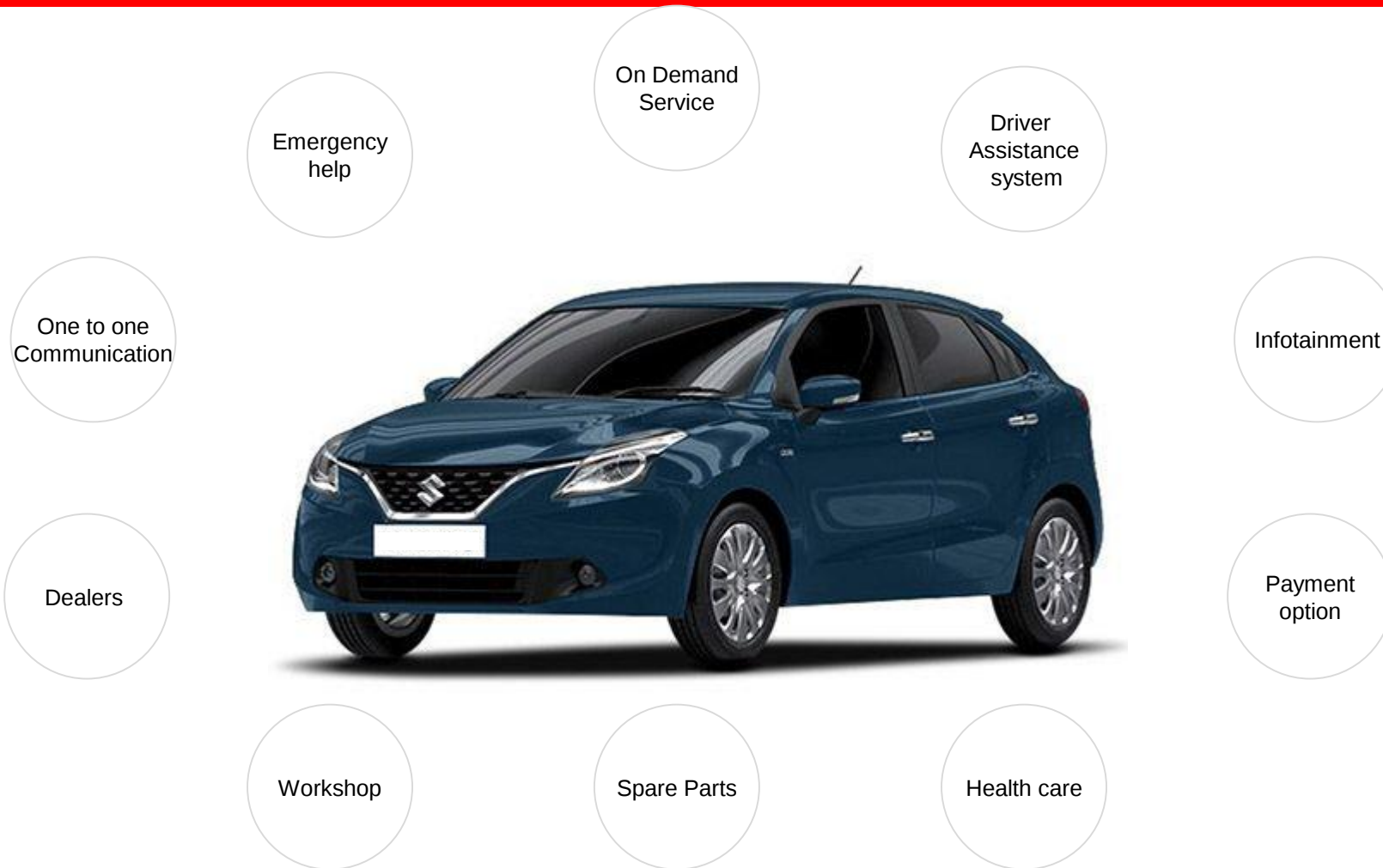
Part name: Clutch Kit

- 1. Clutch Plate
- 2. Pressure plate/Clutch Cover
- 3. Release Bearing

Inclusive of Replacement cost (Labour) 26 to 31 Euro.

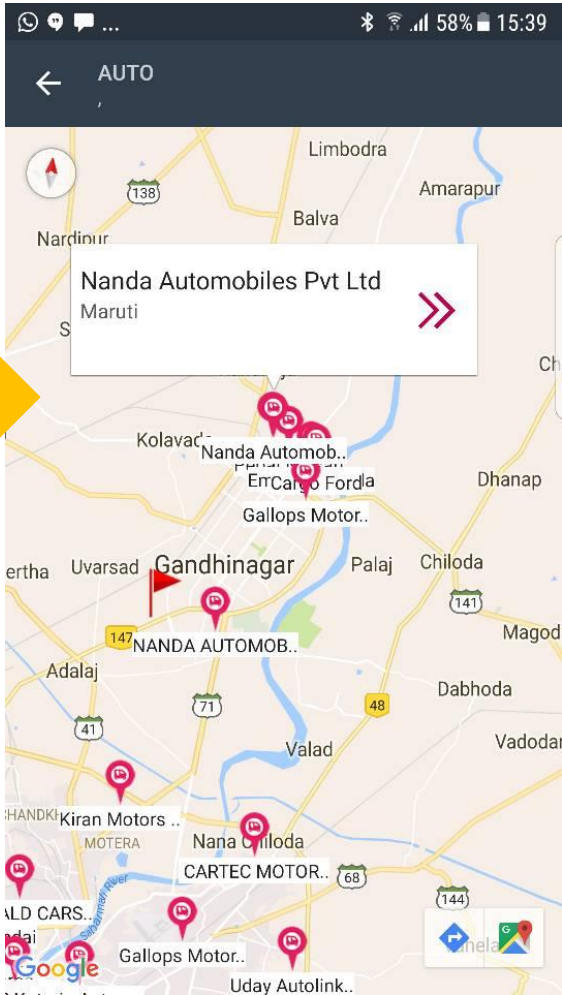
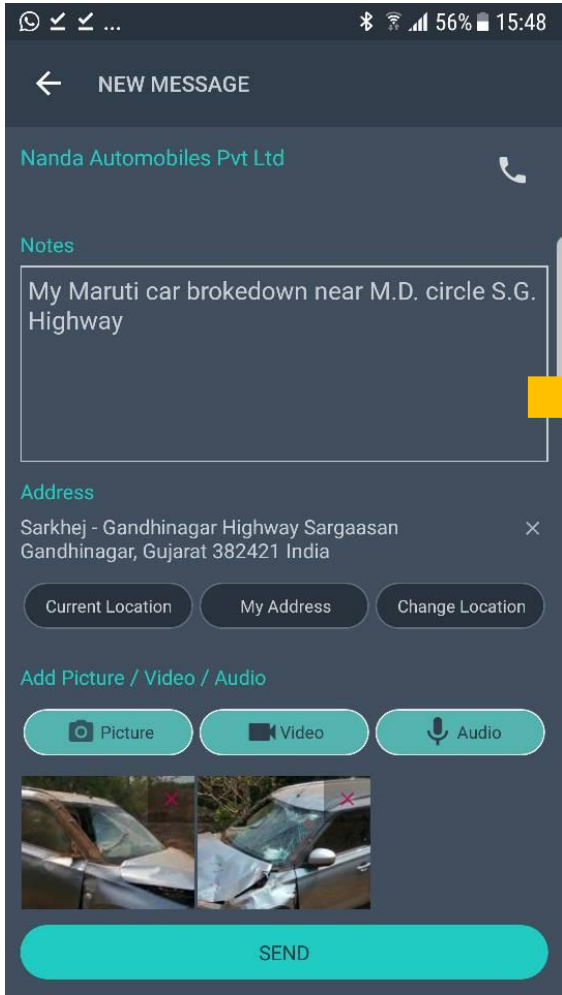
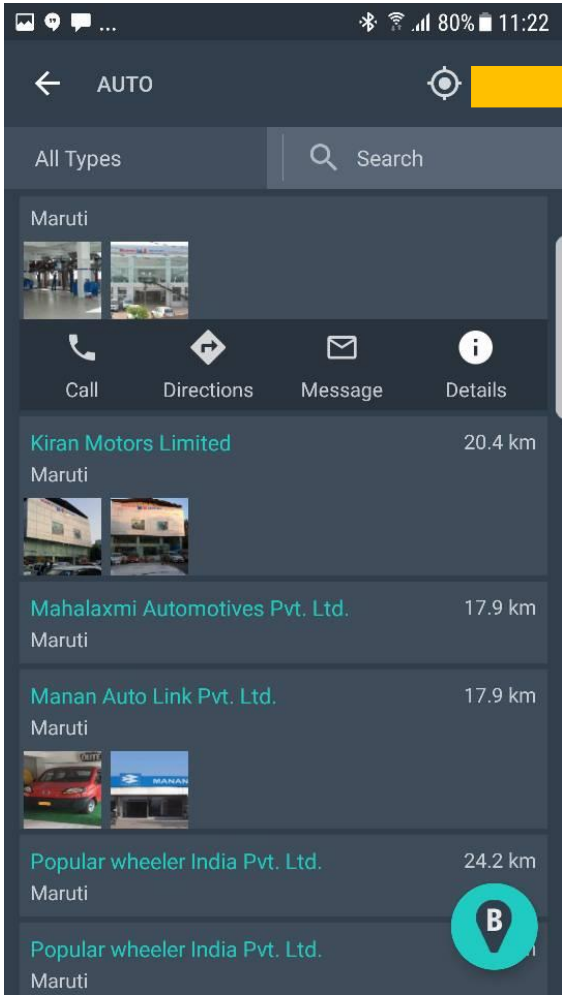
Source: ACG Databank

Connected Car Concept



Connected Car Concept

After Sales Solution





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