



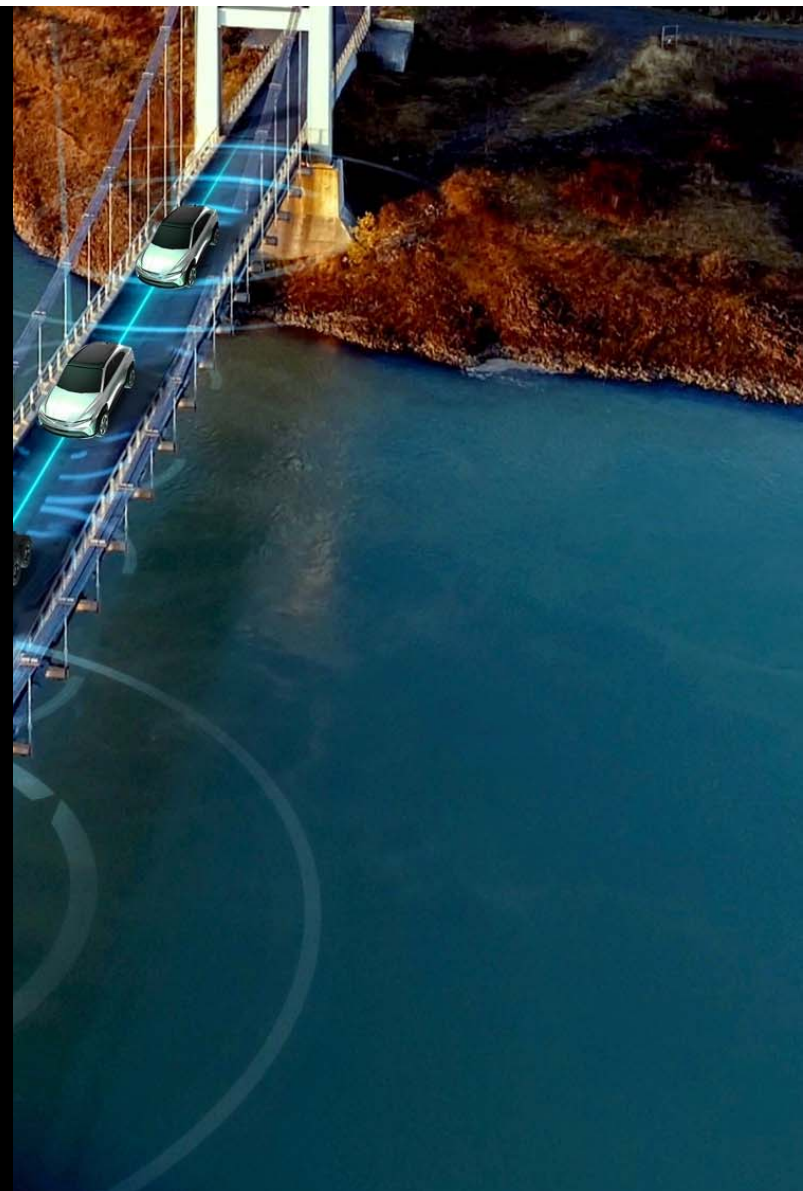
DRIVING THE NEW

BUSWORLD SouthEast Asia 2024

16th January 2024

Presented by : -

A.G. Giridharan
(Dy.CEO, Safety Comfort Systems Domain)



UNO MINDA A Leading Auto Component Player, Since 1958

₹ 130B (\$ 1.57 B)* Group Turnover (FY22-23)	TOP 200 BSE/NSE listed companies	73 Plants Globally
19 JV / TLA Partners	29,300 Employees	26 Product Lines
		6 Acquisitions

VISION

To be a **Sustainable Global** organization that **enhances** value for all its **Stakeholders**, attains **Technology Leadership** and cares for its people like a **Family**.

VALUES



Customer is Supreme



Live Quality



Respect for Individual



Respect for Work-place Ethics



Encourage Creativity and Innovation to drive people, process & products

Top Management Team



Mr. Nirmal K Minda
Chairman & Managing Director



Mr. Ravi Mehra
Deputy Managing Director & Head Group Corporate



Mr. Rajeev Gandotra
CEO – Light & Acoustic Systems Domain



Mr. Kundan K Jha
CEO, Light Metal & Powertrain Systems Domain



Mr. Naveesh Garg
CEO- Electronics and Control Systems Domain



Mr. Amit Jain
Group Chief Technical Officer



Mr. Sunil Bohra
Group Chief Finance Officer & CEO- Safety & Comfort Systems Domain



Mr. Rajiv Kapoor
Group Chief Human Resource Officer



Mr. Rakesh Kher
CEO – Aftermarket Domain



Mr. Ashok Taneja
Advisor



Mr. Navin Paul
Advisor

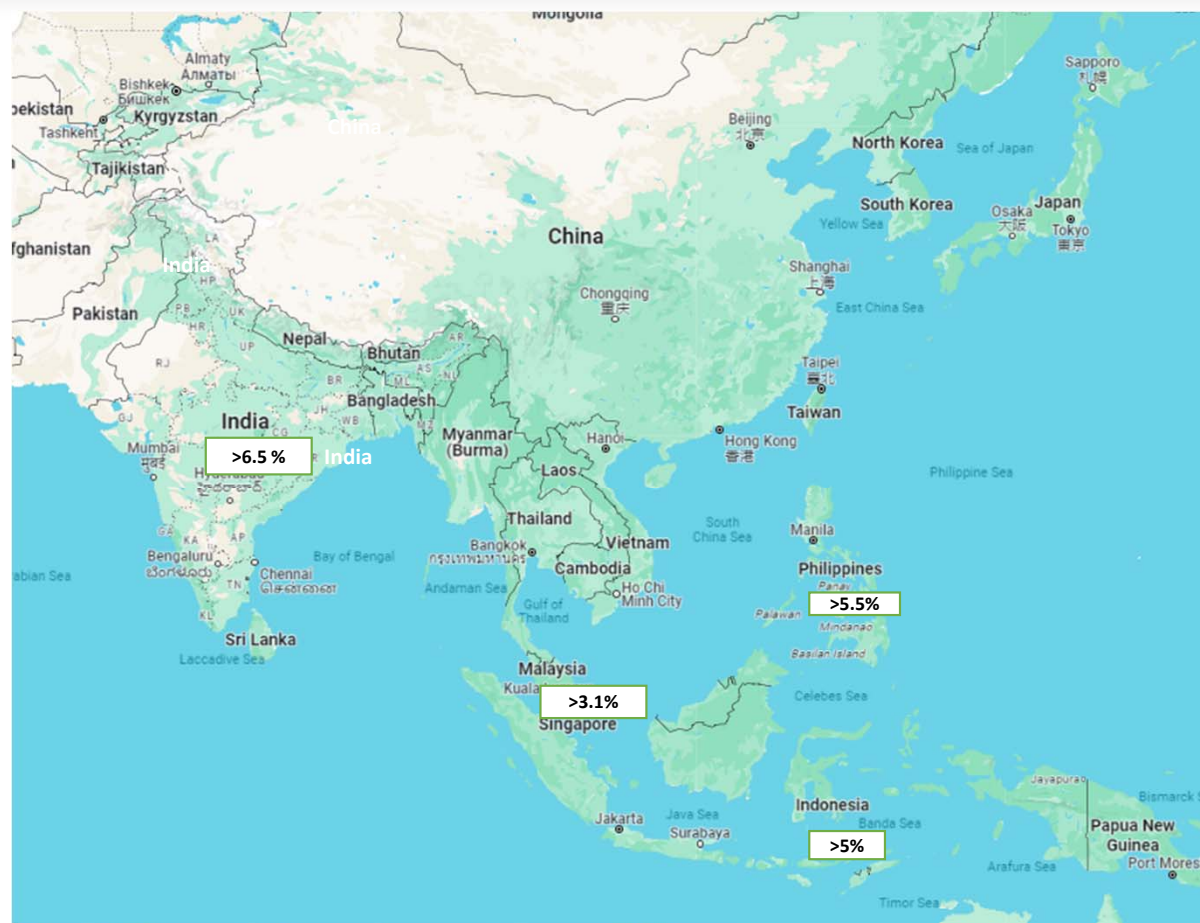
Product Groups



Indian Economy | India is the one of the fastest-growing major economy in terms of both aggregate and per capita GDP

- India aspires to become a \$5 trillion economy – driven by manufacturing and agricultural sectors
- The vision needs to re-orient and re-design the existing policy framework with transformative interventions and unconventional approaches to tackle climate change.

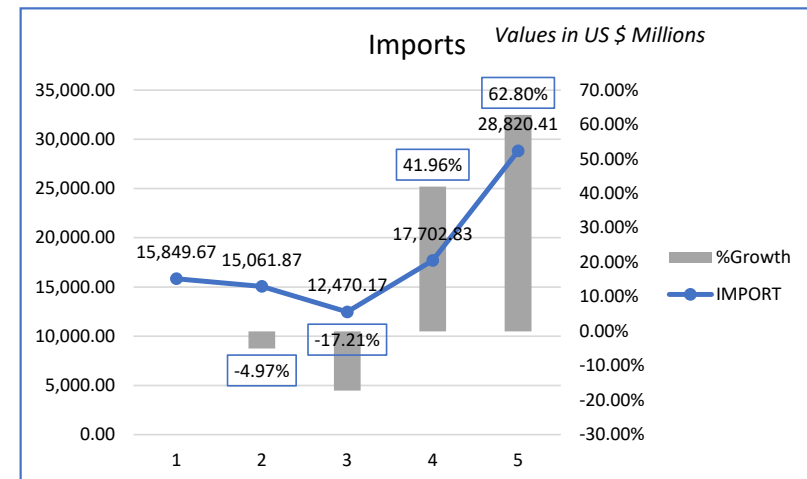
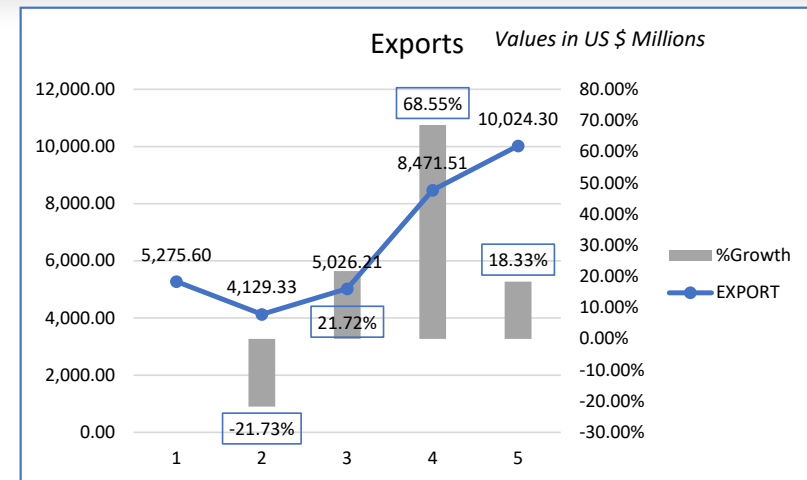
• **Indonesia and the majority of the South East Asian Economies are projected to have a GDP growth more than 5%**



India and Indonesia Trade

- India's **2nd largest trading partner** in ASEAN region.
- Bilateral trade growing
 - from US\$ 6.9 billion in 2007 to US\$ 38.84 billion in 2023.
 - Joint target of **US\$ 50 billion in trade by 2025.**
- Major exported items from India to Indonesia
 - **petroleum products** (US\$ 3.87 billion)
 - **motor vehicles/cars** (US\$ 523 million)
 - **sugar** (US\$ 435 million)
 - **ship, boat, and floating structure** (US\$ 400 million)
 - **iron and steel** (US\$ 389 million) in FY23.

India and Indonesia had civilizational connections for more than two thousand years. Both countries being maritime neighbours and strategic partners have important and close relations.



Uno Minda & Indonesia | Two Decades of Partnership



- PTMA (PT Minda ASEAN automotive) are manufacturing and trading in automotive parts such as electrical switches, lever holder assemblies, horns, lighting solutions and commercial seats.
- We have Continuous strong technical support from our head office located in India, in-house manufacturing capabilities and strong supplier base in Indonesia



Switches and Lever Assemblies



Horns

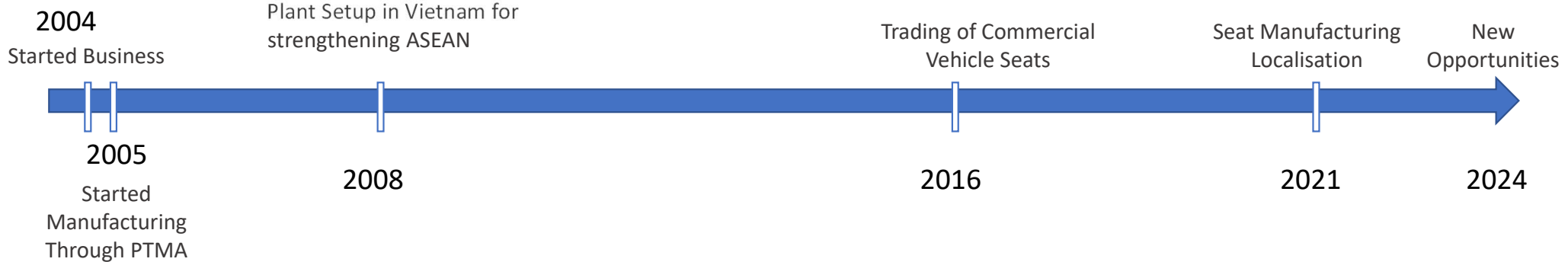


Lamps



Seats

Customer Base



Uno Minda & Indonesia | Two Decades of Partnership



- Location of our major Customers (manufacturing Locations) and our proximity

Strategic Assessment

- 3rd Largest 2W market
- ASEAN export hub
- Local Support to global customers
- Huge demand potential

Product

- Self developed product
- Reliable technology

Partnership

- Own product, no need for partners

Import Regulations and Quotas

- No auto components in negative list

Documentation and Approvals

- Single Window Approval system
- 3-4 Months for approvals
 - BKPM (Investment Coordinating Board), Trade Ministry & Customs Department

Local Content Norms

- For availing subsidy Local Value Addition (LVA) should be > 40%

Supply Chain and S&D Network

- No hurdles in setting up distribution network, as major supplies were to OEM's
- Supply Chain was well developed with proximity to trade routes and air transit to ASEAN countries

Opportunities

- Investment in Roads – USD 70 Billion
 - Planned increase of Road length from 2386 km to 5103km (in 2024), 18800km (in 2030)
- Indonesia Public Transport – 45,000 bus addition by 2030
- Jakarta BRT System 431km to 2149 km
- No of Bus Addition annually – 3000-3300 Units
- No of Buses being Rebuilt by Bus Builders – 2000~2500 Units
- Change of Capital to Nusantara, will focus on cleaner and planned transportation.
- As the economy grows, more commercial and transit systems will increase the need for push for public transportation and last mile connectivity. Which provides a landscape for increased demand for automotive components

Challenges

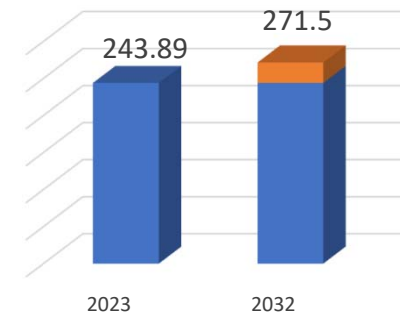
- Decarbonisation of energy and transport sectors
- Policy Framework
- Public Awareness to change perception and behaviour towards public transportation

Future

- Bus Service Improvements
- New Bus Design (Light weight – Electric)
- Filtration Systems – Pandemic Proofing
- Green Financing
- Fiscal Support for Bus Services

Bus Categories

- 5-10 Tonne
- 10-24 Tonne
- > 24 Tonne



Volume of Buses in Use
(in thousand units)
CAGR 1.2%



Uno Minda in Indonesian Market | Way Forward



Indian Suppliers

Will face tough competition from Japanese and Chinese Competition.
Will need to be Technology ready.

Uno Minda

Long Relation with Japanese Suppliers will help us in being competition ready
Pivot from China + 1, and de risking supply chain will give opportunity to work.



Thrust Areas

Post Covid Revival of the industry, major support is required from the govt for revival of the industry. Modernise and expand public transport system. Investment to improve mobility infrastructure. Investment in development of EV support infrastructure.

Localisation

Right Quality, Cost Effective and at the right time is very important in this segment
For which localisation is very important to achieve all three points.
Uno Minda has been able to achieve LVA more than 70%

Exports

Catering to the ASEAN market is very important, as part of our global customers.

Group Strengths



Long Standing Relationships with OEMs

6 Decades of Preferred Supplier status with Major OEMs across all segments



Located close to each customer

Located in all Automotive hubs in India, Growing Global Presence



Strategic & Technology Driven Alliances

With Global Technology Leaders supporting various Product Lines



Robust Systems and Governance mechanism

Strong System, Processes with experienced board to drive Governance and Ethical Practices



Trustworthy and Capable Supplier Base

More than 1500 Suppliers spread across Geographies



Strong R&D Capabilities

33 R&D and Engineering Centers Globally



Extensive Aftermarket Distribution Network

1500 Business Partners, 35000 Retailers & 72000 Service Points



Human Resources

Great place to work certified. Focus on promoting In-house Talent & Succession Management



Cyber risk Management

Strong & robust Security Management & Cyber risk Management framework to safeguard company from cyber threats



Thank You



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