



# *Indian Auto Industry: In Overdrive...*

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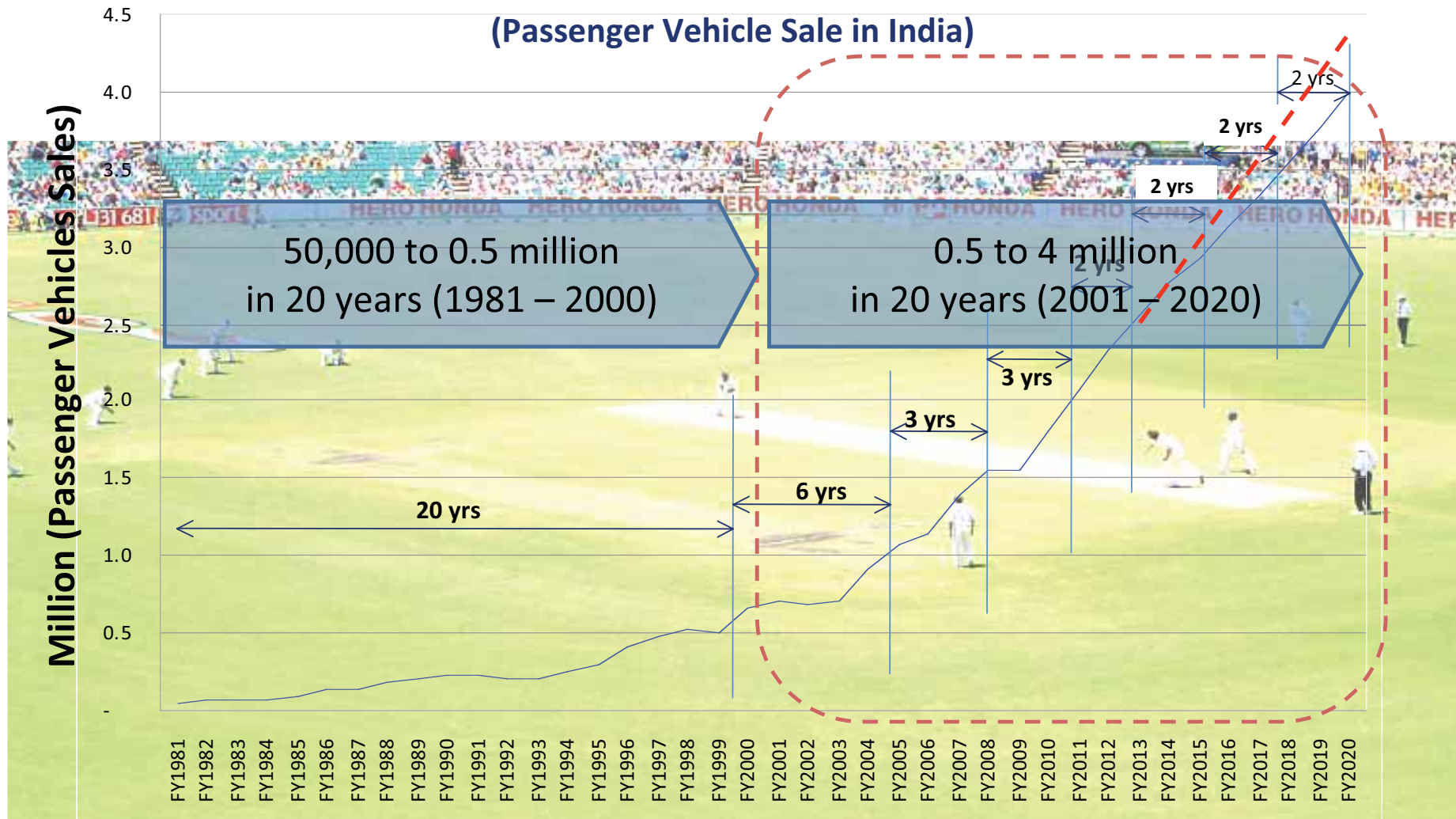
# Indian Auto Industry...

*Triumph of Manufacturing*

*No-where to Every-where*

Let us examine...

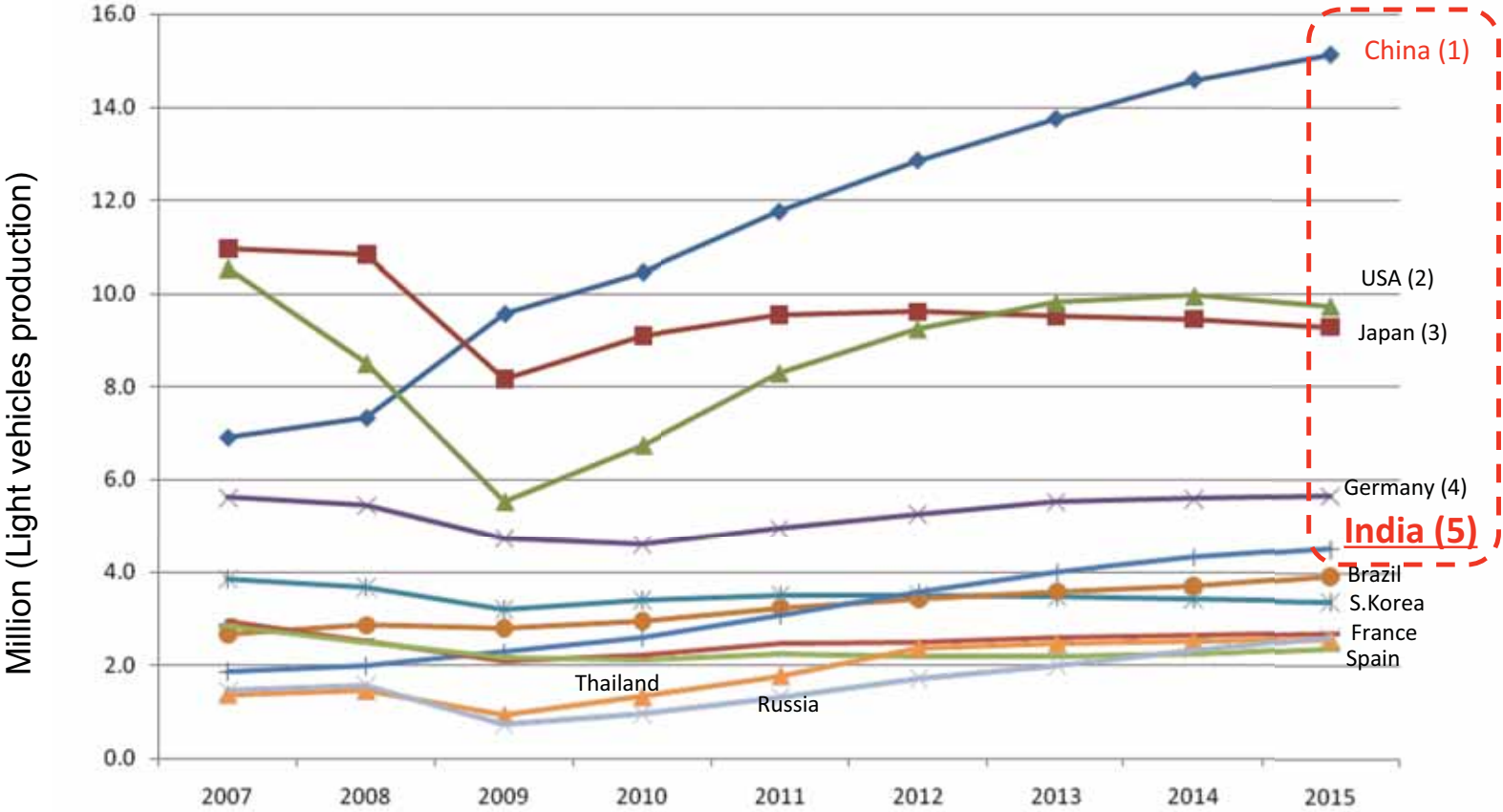
# Twenty - 20



Source: MSIL Internal Research

***30 Years of Reality...Since 1980***

# New Growth Gods



Source: PWC Automotive Institute

***Moving up – India to emerge as 5<sup>th</sup> largest Auto Manufacturing Hub***

**A Paradigm of ...**

***No Limits to Growth***

**Unique values ...**

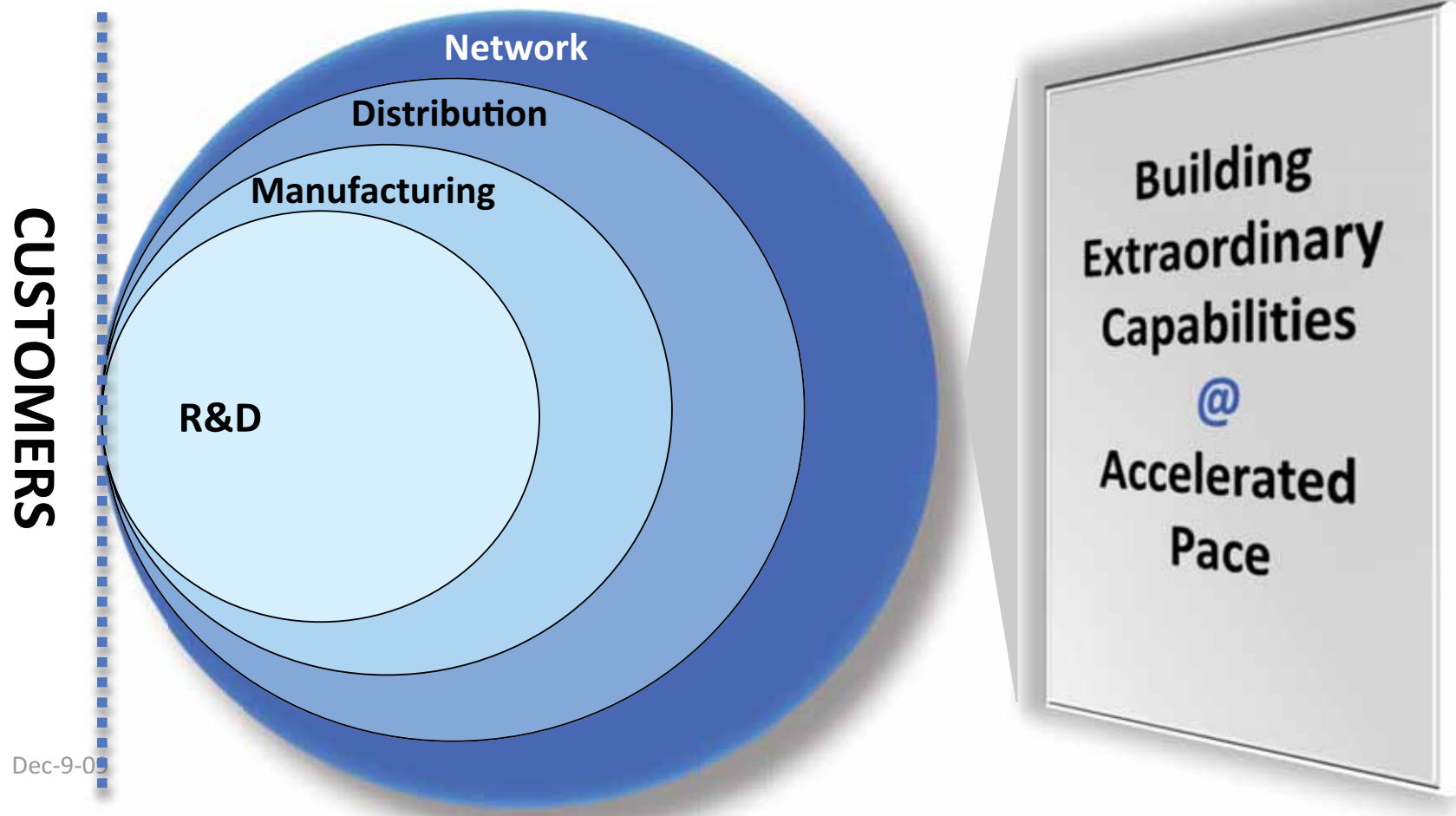
***Spirit of Seventeen***

# The Challenge...

## *Managing the ~~Growth~~es*

# The Challenge ...

## *Building Extraordinary Capabilities*



# The Challenge ...

## *Managing Pace*

# Managing Pace ...

## *Compress Time*

- *New Plants*
- *Lead Times*
- *New Product Launches*
- *Processes*

# Managing Pace ...

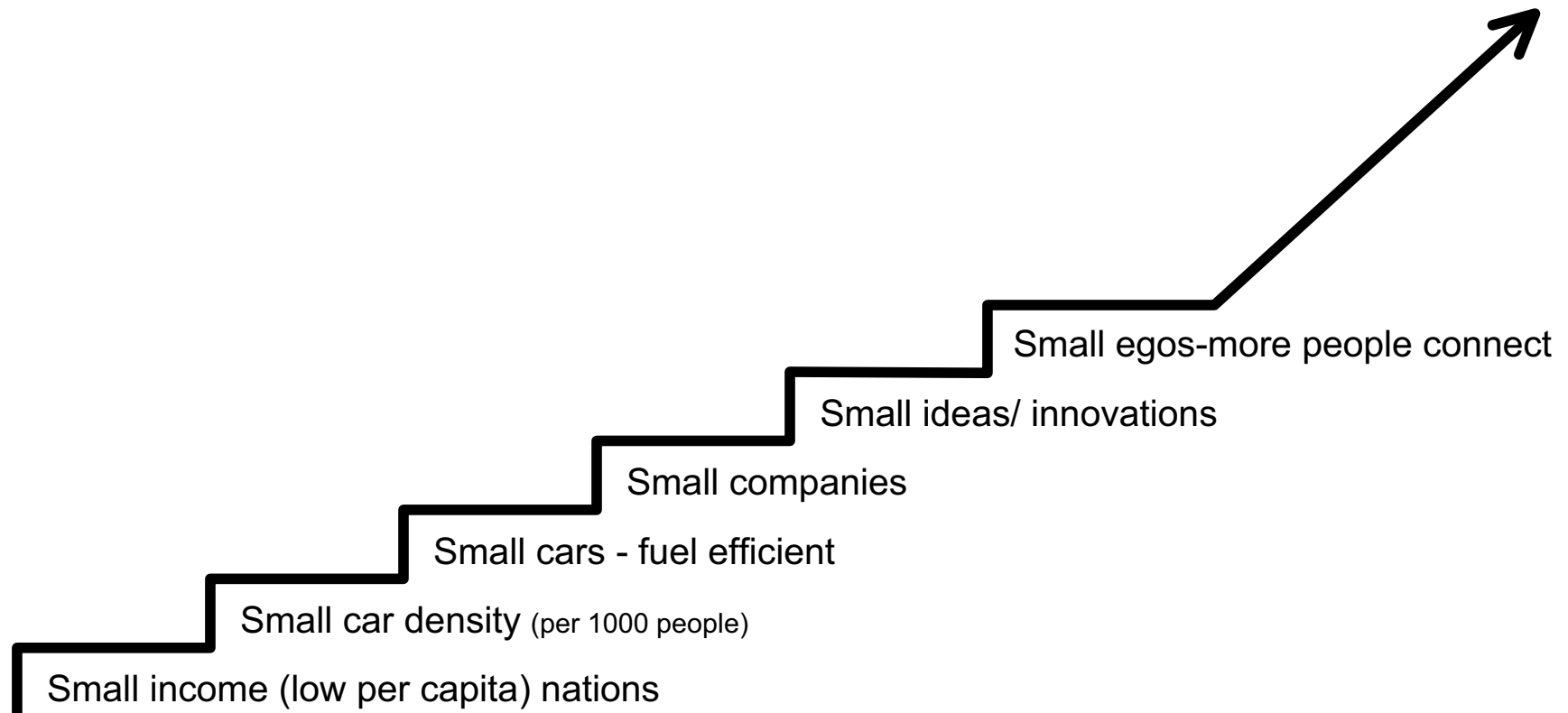
*People*

# Managing Pace ...

*Flexibility*

*Big Future*  
*for*  
*Small Things !*

# Small Will Be Big



# Expanding Role of Manufacturing

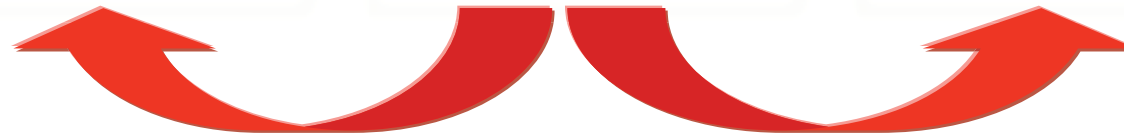
**Suppliers**



**Manufacturing**



**Network**



**Manufacturing role is now evolving across the value chain**  
**Helping the Suppliers to improve their production processes**  
**Supporting Dealers in improving inspection/ service standards**

# Thanks