

Auto-Electronics Manufacturing: Conquering the Next Frontier

September 2023





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Foreword



The automotive industry is undergoing a major transformation, driven by digital technologies. Concepts such as shared mobility, connected mobility and smart vehicles are changing the way we look at automotives. In today's era, vehicles have undergone a remarkable evolution, becoming advanced electronic gadgets that seamlessly incorporate sensors, communication setups, and artificial intelligence to improve safety, efficiency and the overall user experience.

The adoption of auto-electronics is triggered by multiple factors such as need for increased safety features, better vehicle performance, more integrated components, and the adoption of Electric Vehicles (EVs). Currently, many vehicles on the Indian roads have advanced features such as Automated Driving Assistance Systems (ADAS), Electronics Stability Control (ESC), integrated driver information displays. Driven by these factors, the market for auto-electronics is expected to grow from USD 10.6 billion currently to approximately USD 74.4 billion in 2032.

The Prime Minister of India's overarching vision of Aatmanirbhar Bharat emphasises on creating a globally competitive manufacturing sector in the country. This Vision is expected to create more jobs, give fillip to ancillary industries and result in an overall development of the economy. With around 64% of the local demand being met through imports, we believe that manufacturing of auto electronics could be a huge area of development. I am happy to introduce this report, which gives us a roadmap on how India can develop a competitive auto-electronics manufacturing sector.

One of the major challenges, going forward, is likely to be the availability of skilled workforce. The latest

technologies in the electronics industry are constantly evolving, and workers need to be constantly upskilling to stay ahead of the curve. Hence, collaboration between the industry, education institutions and centres of research and development (R&D) becomes vital.

The way forward will require strong industry-wide collaboration, support from the Government of India and proactive deliberations, where Automotive Components Manufacturing Association of India (ACMA) will continue to strive to play a pivotal role. The active participation of all ACMA members has been instrumental in suggesting specific key action points mentioned in the report. I would like to acknowledge the support of the governments at the centre and states, who have been extremely receptive to ACMA's suggestions and inputs. I am particularly grateful for the support extended to us by the Ministry of Heavy Industries, the Ministry of Electronics and Information Technology, Indian Cellular and Electronics Association, ACMA members and other industry bodies.

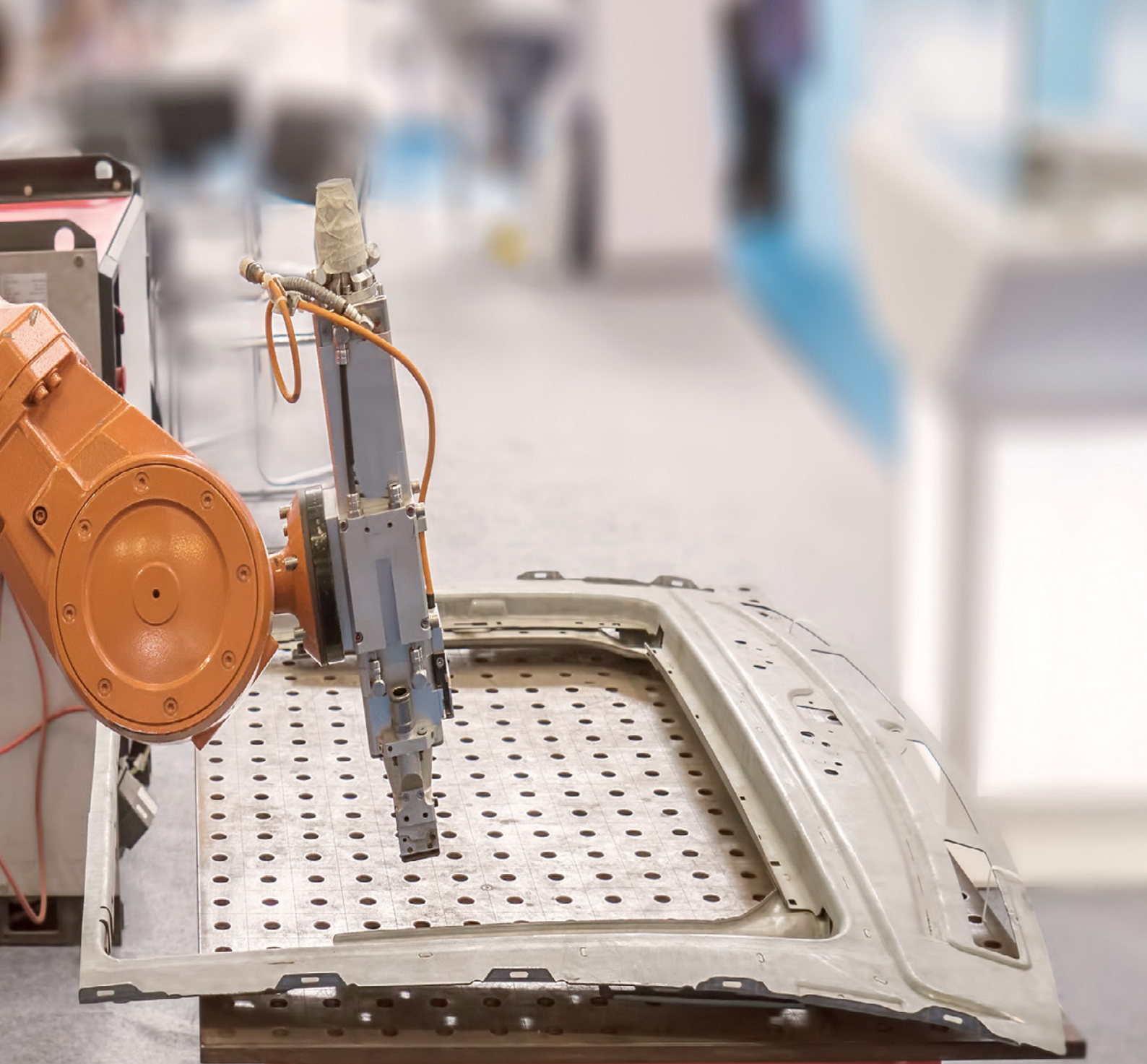
I am confident that the recommendations and best practices enumerated in the report, formulated basis detailed industry and policy analysis, ACMA member inputs, and global benchmarking, will enable the country to create a globally competitive auto-electronics manufacturing sector.

— Mr Sunjay J Kapur

President, ACMA and Chairman,
Sona Comstar

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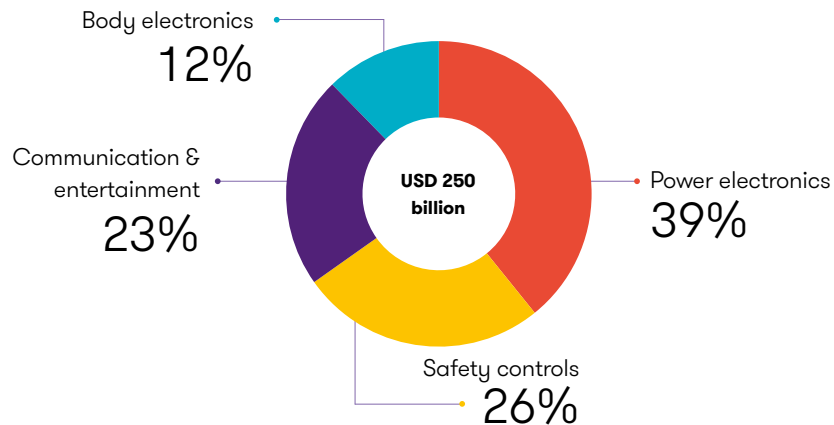
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2. Global market

Globally, the share of auto-electronic parts in any vehicle is growing due to multiple factors. The global market for automotive electronics is poised to grow at a CAGR of 8–10% to reach USD 540–650 billion in 2032 from USD 250 billion in 2022. As vehicles incorporate more electronics across multiple areas, OEMs are expected to account for nearly 70–75% of the market as most electronics are likely to be factory fitted. Passenger vehicles will lead the market accounting for 80–90% of the market with the remaining demand coming from commercial vehicles. This report analysed the use of auto-electronics across four key application areas — power electronics, safety controls, communication and entertainment and body electronics. Among these, power electronics leads the market with a 39% share, followed by safety controls at 26%.

Breakdown by Global Auto-Electronics Demand by Product Categories (2022)



2.1. Major trends shaping the global consumption:



Increasing penetration of EVs:

Globally, electric car sales is expected to account for ~25% of car sales by 2030. Many OEMs have undertaken several strategic initiatives to cater to an increasing demand for EVs. They have an increased share of electronics as they have more electronic components as compared to ICE.



Growth in ADAS solutions:

Automated Driver Assistance Systems (ADAS) are gaining impetus since they offer enhanced driver awareness, better accessibility and improved safety. OEMs and tier-1 suppliers are investing rapidly to develop level 3 and level 4 technologies.



Regulations and policy support:

Regulations across the globe such as mandatory requirement of eCall systems, tire pressure monitoring systems and driver awareness systems are positively impacting the demand for safety and communication electronics.



OEMs using auto-electronics as differentiators:

OEMs are now using auto-electronics linked features to offer USP and gain a competitive edge.

3. Indian market

In the Indian market, products covered for this study include:

Power electronics (ICE)	Power electronics (EV)	Safety controls	Communication and entertainment	Body electronics
Fuel injector	Power distribution module	Electronic power steering	Telematics unit	Reverse parking guide
Selective catalytic reduction	DC-DC Converter	Tire pressure monitoring system	Driver information system	Fully automatic temperature control
Exhaust gas recirculation	Thermal management system	Airbag electronics	In-car entertainment system	Remote keyless entry & immobiliser
Automatic transmission system	Charger system	Electronic stability control	Navigation system	Body control module
Engine control system	Controller	Anti-lock braking system		

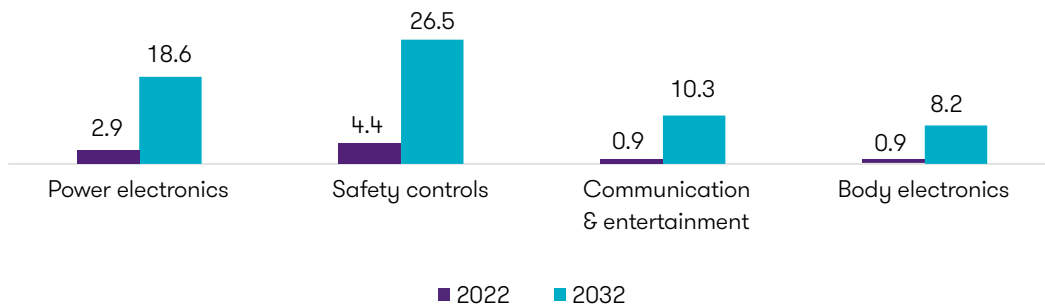
Table 1: Product universe

The Indian automotive electronics market currently is estimated at USD 10.6 billion of which around 86% is for the domestic market while the rest is for vehicle exports. India, currently, relies heavily on imports to fulfil the demand of auto-electronic products with around 64% of the total demand being imported. The share of imports varies widely across products as India has manufacturing capabilities in products such as exhaust gas circulation, electronic power steering, airbag electronics, anti-brake locking system and fully automatic temperature control.

The overall market, for auto-electronics is estimated to reach USD 70.3-74.4 billion by 2032. Domestic market demand is projected to grow at a CAGR of 21.5% from 2022 to 2032 to

reach a market size of USD 63.7 billion. Demand from exported vehicles is forecasted to reach a market size of USD 6.6 to 10.7 billion in 2032, registering a CAGR of 15.8% - 21.4%. Safety controls have the highest demand in the country, accounting for 49% of total demand in 2022 followed by power electronics at 32%, communication & entertainment and body electronics at 10% each. Within power electronics, power electronics of internal combustion engine cars dominate the market currently. Safety controls are forecasted to maintain their market dominance in 2032 with a market share of 42% followed by power electronics, communication & entertainment and body electronics at 29%, 16% and 13%, respectively.

Indian Auto-Electronics Market by Product Categories (USD billion, 2022-2032)





3.1. Major trends shaping the demand in India:



Regulatory initiatives are acting as enablers:

Regulatory decisions and policies such as BS VI norms, FAME 2, mandatory six airbags rule etc., are providing demand push across product categories.



Acceptance of EV across segments:

The sales of electric cars and electric two-wheelers are expected to rapidly increase in the next 10 years. Acceptance of EVs for personal and for business use (e-commerce companies for deliveries) has resulted in increase in demand.



Electronics-led features becoming a norm across vehicles:

Certain features such as keyless entry, reverse parking sensors, and anti-lock braking systems that were once available only in premium segment vehicles are now a norm in the market. OEMs are now using auto-electronics linked features to offer USP and gain a competitive edge.



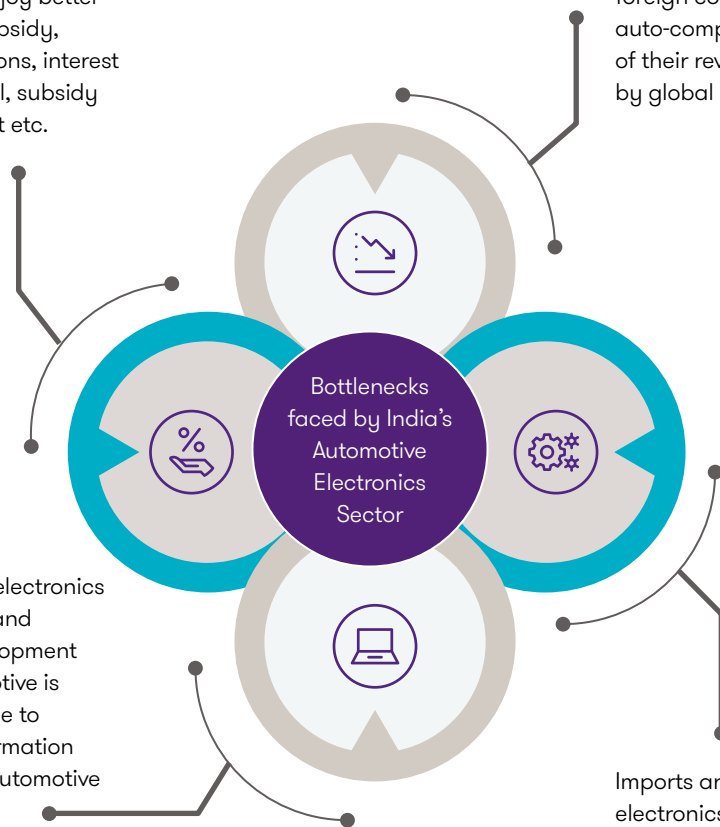
Emergence of start-ups:

In general, start-ups in any industry are centered around white spaces and unmet customer demand. A growing number of start-ups and their partnership with OEMs is a positive sign for the industry.

4. Challenges faced by the industry and learning from established markets

India has cost disability differential of >7.5% w.r.t. established manufacturing hubs. Manufacturing hubs enjoy better benefits in terms of labour subsidy, corporate income tax reductions, interest subvention on working capital, subsidy for machinery and equipment etc.

Indian players have low rate of investments in R&D as compared to their foreign counterparts. In the past, Indian auto-component players have spent <3% of their revenue on R&D vs 6–10% spend by global majors.



Software solutions and auto-electronics design are critical elements, and despite India's software development capabilities, its use in automotive is in early stages of maturity due to limited linkages between information technology companies and automotive manufacturers.

Imports are preferred for automotive electronics even for products which are being manufactured in India. Multiple HSN codes are being used to import automotive electronics, seemingly making it difficult to assess overall imports.

R&D spend given paramount importance

- 1 The German automotive suppliers have invested an average of 5.7% of their turnover in R&D in recent years.
- 2 In FY20, research and development spend in the Japanese automotive sector amounted to USD 28 billion, contributing to ~30% of total R&D spend across all major manufacturing sectors in Japan.

Declining cost of vehicle ownership

- 1 The average monthly maintenance cost of a passenger vehicle in Japan has come down from USD 144 in 2013 to USD 115 in 2022.
- 2 In Germany, total number of passenger cars registered increased from 45 million to 48 million, the market for automotive maintenance services declined from USD 38 billion to USD 31 billion during 2016–21.

Use of advanced electronics to meet regulations

- 1 National Highway Traffic Safety Administration (USA) has mandated the use of multiple safety technologies across different vehicle segments — electronic stability control, occupant crash protection (i.e., airbags, seatbelt sensors, etc.), and rear visibility systems.
- 2 In Germany, The average CO₂ emissions for cars reduced by 12% from 128g to 113 g CO₂ / km during 2017–20, with a 55% reduction target till 2030.

Cluster approach enabling industry revolution

- 1 Detroit is home to more than 200,000 assemblers and manufactured more than 1.6 million vehicles in 2020. The region received automotive investments of ~USD 42 billion from 2009–2019.
- 2 Aichi is one of the key automotive cluster in Japan. It is home to Toyota and its major tier 1 suppliers located in proximity, positively impacting cost of delivery, quality management, new product development, etc.

Germany, the US and Japan have established themselves as the market leaders



5. Targets for the industry

The total automotive electronics demand in India is projected to grow from USD 10.6 billion in 2022 to USD 70.3–74.4 billion by 2032. This sector is apt for India to look at creating a globally competitive manufacturing hub, given that imports account for around 64% currently. A reasonably established

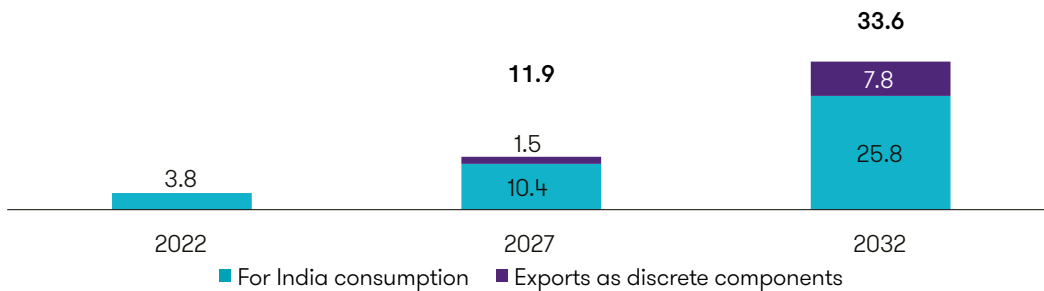
manufacturing base for certain auto-electronic products and a substantial domestic demand together with suitable competitiveness building measures can create a large manufacturing sector in this area.

5.1. Target setting: Base case scenario

In the base case, the manufacturing sector is expected to grow in line with the demand growth in automotive electronics resulting in manufacturing growing at a CAGR of approximately 21%. As Indian manufacturers set up

competitive operations, exports of discrete components could also be increased. With a moderate focus, it is expected that India's auto electronics exports will be similar to exports of other auto components, i.e., around 30%.

Auto-Electronics Manufacturing Target - Base Case (USD billion)

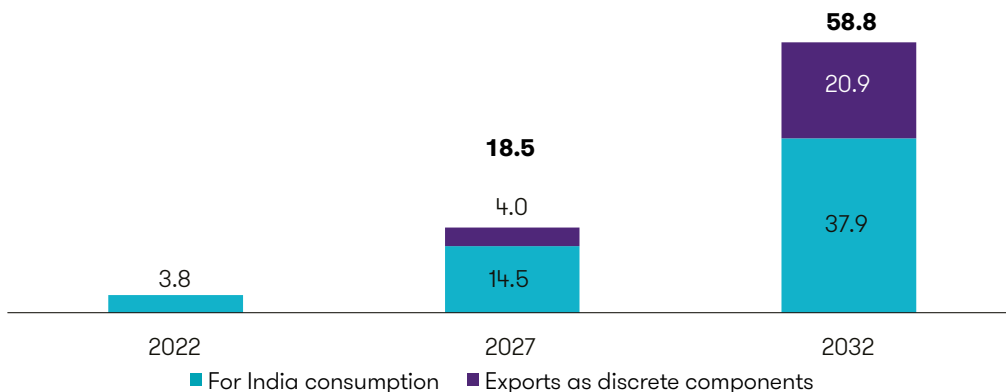


5.2. Target setting: Optimistic case scenario

In an optimistic scenario, the manufacturing sector is expected to outgrow growth in demand for automotive electronics and aim to swap the ratio of imports to domestic. Such a target will imply that Indian manufacturers will be competitive across

products and hence, the share of exports are also expected to increase. With a favourable environment, India can aim to match the export share of manufacturing hubs such as Japan by 2032.

Auto - Electronics Manufacturing Target - Optimistic Case (USD billion)



6. Recommendations for the industry

Indian companies need to compete with global players in a field where technologies are constantly evolving. Hence, it is critical that the manufacturing sector is competitive on a global scale. India could look at a five-to-seven-year horizon to achieve this competitive position through focussed interventions on five areas.



Focus on manufacturing products that have either high market potential or ease of manufacturing:

There are 23 automotive electronics products that have an established demand in the Indian automotive market. Out of the 23, there are 20 such products that have either a high market potential or are moderately easy to manufacture. The total demand in India for these 20 products is currently estimated to be USD 9.3 billion and is expected to reach USD 56.4 billion in 2032. It is suggested that Indian players could start focussing on these 20 products.

India has the technology, infrastructure and workforce to assemble all these focus products. The country can achieve an average value addition in the range of 10-20% as assembly operations for auto-electronics requires moderate to high investment and skills. By focusing on achieving the localisation of assembly operations, India can achieve its goal of reducing reliance on import. The savings could be in the range of USD 1.2 billion to USD 3.7 billion in 2027 and USD 3.4 billion to USD 11.8 billion in 2032.

Products with high market potential and ease of manufacturing			
Reverse Parking Guide	Dc-Dc Converter	Charger System	Tire Pressure Monitoring System
Controller	Telematics Unit	Navigation System	Electronic Power Steering
Power Distribution Module	Thermal Management System	Engine Control System	
Products with either high market potential or ease of manufacturing			
Exhaust Gas Recirculation	Remote Keyless Entry and Immobilisers	Automatic Transmission System	
Airbag Electronics	Driver Information System	Anti-Lock Braking System	
Body Control Module	In-Car Entertainment System	Fuel Injector	

Table 2: Focus Products



Encourage manufacturers of child parts (electronic and non-electronic) that can be used across different automotive electronic products to increase local value addition:

Currently, most OEMs import the child parts and assemblies of the products- often these include parts where India has a reasonable manufacturing base. Examples of such child parts include thin wall casing, heat exchangers, thermoplastics and PCBs. Indian manufacturers were already manufacturing these for non-auto application and will need to design these products for auto as the overall standards required for the auto sector is significantly higher than other consumer products. In cases such as PCBs, manufacturers need to move towards multi-layer PCBs to support the higher level of circuit complexity required for automotive electronic products.

Increasing value addition and localising manufacturing can help India achieve significant savings in its import bill. For example, electric control unit (ECU) thin wall casing accounts for 20–25% value share in engine control unit. Similarly, heat exchangers account for 20% share in thermal management system. Currently, most OEMs import assemblies including electronic control unit thin wall casings and heat exchangers. Localisation of just two products (ECU thin wall casing and heat exchangers) can reduce the import bill by USD 275 million by 2032.



Promote collaboration between Indian automotive and information technology companies to localise the software solutions required for automotive electronics:

The automotive electronic products that are currently manufactured in India have negligible to low software requirement. All automotive electronics products with medium-to-high software requirement are currently imported. Hence, there is a lack of technical know-how among both automotive suppliers as well as IT companies on the relevant capabilities required for automotive electronic products. Some of the key

software-related capabilities required in automotive electronic products include — body control modelling, integration testing, automation testing etc. Globally, software-related capabilities are unlocking new revenue streams for OEMs: examples include monetisation of apps, infotainment, and software-enabled features. Therefore, promoting a collaboration can help reduce the import bill.



Form clusters to create competitiveness of manufacturing automotive electronics:

India currently faces cost disability to the tune of 7.5%–15% as compared to Vietnam and China, respectively. Established hubs of automotive electronics such as Germany, the US, South Korea, Japan have all adopted cluster approach to achieve synergies in their business. Dedicated clusters to address cost disability should be created for the sector. Some of the benefits that such clusters should offer can include reduced land and building costs, common support services such as

testing/certification, hostels for labour and staff, back-up power, and logistics support. India has made the right move by setting up multiple electronics manufacturing clusters such as, ELCINA Electronics Manufacturing Clusters located in Bhiwadi, Rajasthan that could potentially reduce the cost of manufacturing by 5–8%. Similar clusters could be encouraged for auto applications. Investment promotions, easing of labour costs, encouragement to R&D and international technology acquisitions could further add another 2–3%.



Establish technical as well as academic linkages for capability and skill building required for automotive electronics:

Establishing dedicated R&D centres focused on automotive electronics manufacturing can be facilitated by technical connections with globally renowned centres of excellence (CoEs) in the field. Some examples include KPIT Technology's centre of excellence in Germany and Toyota Research Institute in Japan. Start-ups in automotive electronics can be mentored on technology and product development with the help of new R&D centres. Establishing academic connections

between Indian and international universities can facilitate the development of specialised degree and certificate programs in the field of automotive electronics. This collaboration will contribute to the growth of human capital, nurturing future R&D and manufacturing. The University of Michigan, the US, and the University of Warwick, the UK offer programmes focused on automotive electronics.



Auto-electronics is getting a critical share in the cost of automotives. Technical advancements, regulatory requirements and the overall move towards safer and convenient vehicles is expected to drive the demand for auto-electronics. Given the substantial domestic demand, Indian manufacturers could evaluate entering this sector. There are five clear areas that need intervention. A concerted collaboration between the government, industry bodies such as ACMA, and the industry players is required to make the segment globally competitive.

7. Appendix

Explanation of the four product categories of auto-electronics

Power electronics:	Components that control and process the flow of electrical energy required in both ICE and EV vehicles. E.g., Engine control unit, EV charger etc.
Safety controls:	Components that are responsible for the active and passive safety related features in the vehicle. E.g.: Airbag electronics
Communication and entertainment:	Components that deliver entertainment and information to driver, passengers, and externally. E.g., Telematics
Body electronics:	Components that provide the control function to implement the diagnostics, safety features and manage power. E.g., Reverse parking guide

8. Acknowledgements

Grant Thornton Bharat would like to thank ACMA for giving us the opportunity to work on this report.

We would also like to thank, The SCALE committee, Executive Committee of ACMA, SIAM, Ministry of Heavy Industries for their valuable contribution in making this report.

We would like to thank the following executives who provided us with valuable inputs at various stages of the report:

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SIAM

Such a report would not be possible without industry interactions. We would like to thank these businesses who shared their inputs during the engagement.

Organisations

ZF

MG Motor

Continental Corporation

Daimler Trucks

Bosch

Mahindra

ASK Automotive

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About ACMA

The Automotive Component Manufacturers Association of India (ACMA) is a apex body representing India's Component Industry. It boasts a membership exceeding 850 manufacturers, contributing to more than 85% of the auto component industry's total turnover. ACMA proudly holds ISO 9001:2015 certification.

ACMA's primary mission revolves around stimulating growth, job creation, and economic prosperity. Through its relentless dedication to research & development initiatives, ACMA ensures that India maintains a leading position in global automotive component manufacturing.

With its continually expanding network, ACMA empowers businesses by providing invaluable resources, industry insights, and opportunities for collaborative endeavours. The organization plays an indispensable role in shaping policies and regulations that nurture an environment conducive to sustainable growth.

India's automotive industry is a vital sector, contributing 49% to the country's manufacturing GDP, 7.5% to the overall GDP, and supporting approximately 38 million jobs. Despite challenges like chip shortages, overbooking, fuel price-induced inflation, and rising commodity prices, the overall industry is valued at \$150 billion.

In the fiscal year 2022-23, on the back of strong vehicle sales, a robust aftermarket, and growing exports, the auto component industry achieved unprecedented success. It reached a size of Rs. 5.60 lakh crore (USD 69.7 billion), recording a remarkable growth of 32.8%, surpassing the previous high turnover of Rs. 4.20 lakh crore in FY21-22. Exports increased by 5.2% to Rs. 1.61 lakh crore (USD 20.1 billion), while imports grew by 10.9%

to Rs. 1.63 lakh crore (USD 20.3 billion). The Aftermarket, estimated at Rs. 85,333 crores, also saw steady growth, registering a 15% increase. Auto component sales to OEMs in the domestic market surged by 39.5% to Rs. 4.76 lakh crore.

This growth in domestic auto component sales to OEMs, reaching Rs. 4.76 lakh crores (USD 59.3 billion), reflects a 39.5% increase compared to the previous year. The demand for higher-value components and a shift towards larger, more powerful vehicles contributed to this growth.

In 2022-23, exports of auto components grew by 5.2% to Rs. 1.61 lakh crore (USD 20.1 billion) compared to Rs. 1.41 lakh crore (USD 19.0 billion) in 2021-22. North America accounted for 32% of exports, with an 8% growth, while Europe (31%) and Asia (26%) saw 3% and 4% growth, respectively. Key export items included drive transmission and steering, engine components, body/chassis, suspension, and braking systems.

Domestic market traction also led to an increase in component imports into India, growing by 10.9% in 2022-23 to Rs. 1.63 lakh crore (USD 20.3 billion) from Rs. 1.36 lakh crore (USD 18.3 billion) in 2021-22. Asia represented 66% of imports, followed by Europe (26%) and North America (6%), with growth rates of 12%, 6%, and 23%, respectively.

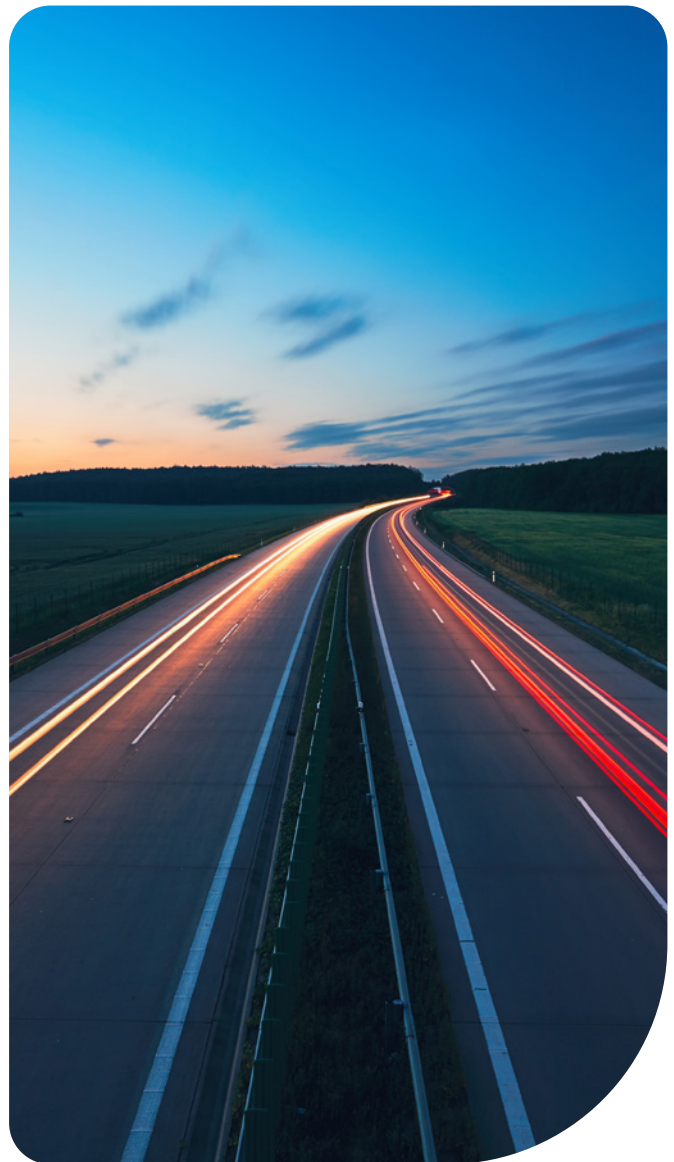
Post-pandemic, increased vehicle movement and demand for used vehicles boosted the aftermarket across all segments. The aftermarket turnover in FY 2022-23 reached Rs. 85,333 crore (USD 10.6 billion), compared to Rs. 74,203 crore (USD 10.0 billion) in the previous year.

ACMA plays a crucial role in the industry's development in India, actively engaging in trade promotion, technology enhancement, quality improvement, and information dissemination. It participates in international trade fairs, sends trade delegations overseas, and publishes materials on various automotive industry-related subjects.

ACMA also contributes to manufacturing advancements by offering skills training and mentoring through cluster programs and special projects such as 'Asset Turnover Improvement,' 'Uptime Improvement,' 'Zero Defect Quality,' and 'Sustainable Manufacturing,' among others. Additionally, ACMA is well-represented on various government panels, committees, and councils, helping shape policies and regulations for the Indian automotive industry.

For information exchange and cooperation in trade matters, ACMA has signed Memoranda of Understanding (MoUs) with counterparts in multiple countries, including Argentina, Australia, Brazil, Canada, Egypt, France, Germany, Hungary, Iran, Italy, Japan, Kazakhstan, Malaysia, Mexico, Nigeria, Pakistan, Poland, Russia, South Africa, South Korea, Spain, Sri Lanka, Sweden, Taiwan, Thailand, Tunisia, Turkey, the UK, the USA, and Uzbekistan.

You can find more information and data about the Indian automotive industry on the ACMA website: www.acma.in





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