

ACMA

Automotive Component Manufacturers Association Of India

Press Conference

Auto Component Industry's Performance Review

FY 2026/ FY 2025

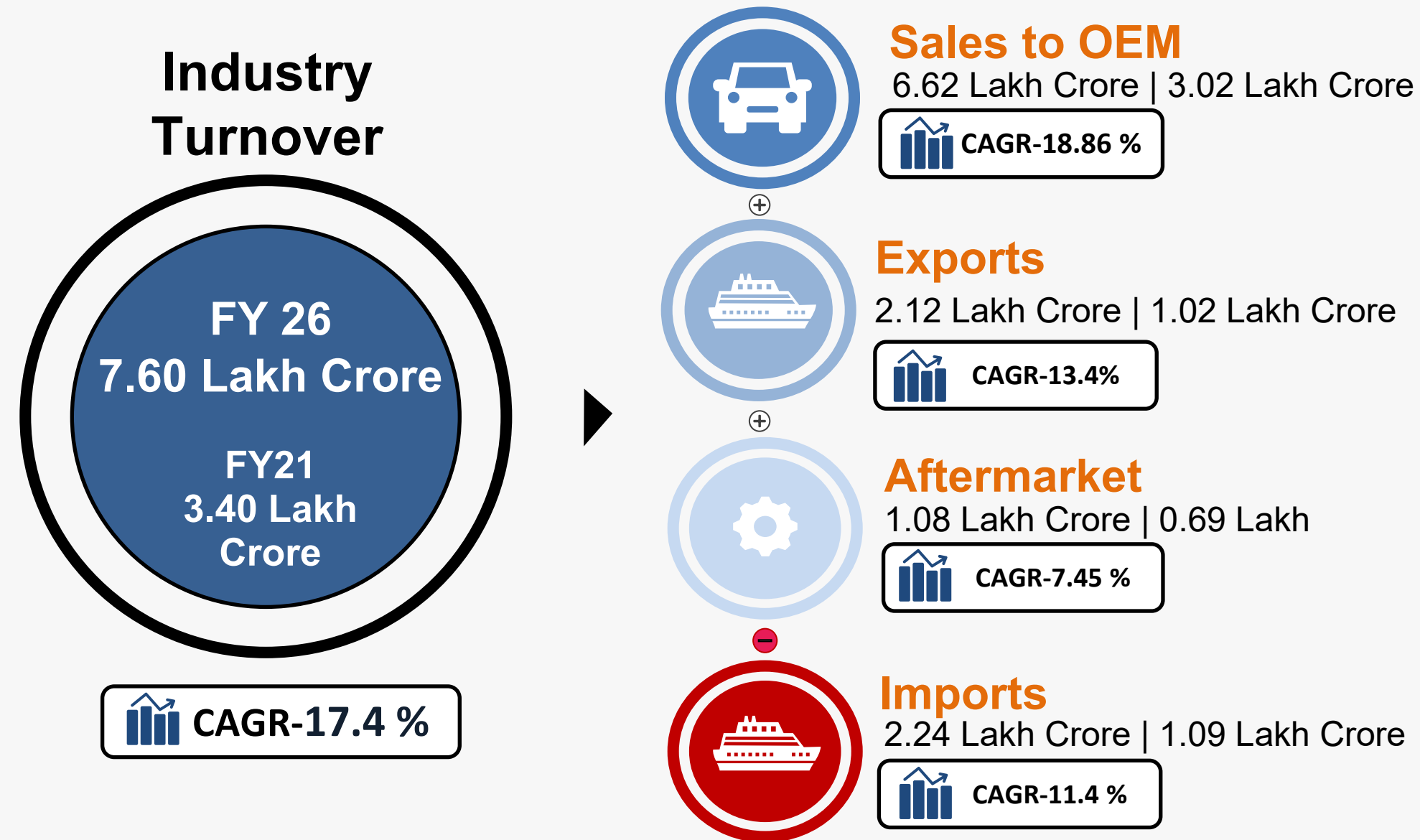


7th July 2026, New Delhi

ACMA

Indian Auto Component Industry-A key driver of Indian Economy

Industry turnover doubled, growing at a CAGR of 17 % from FY21 to FY26

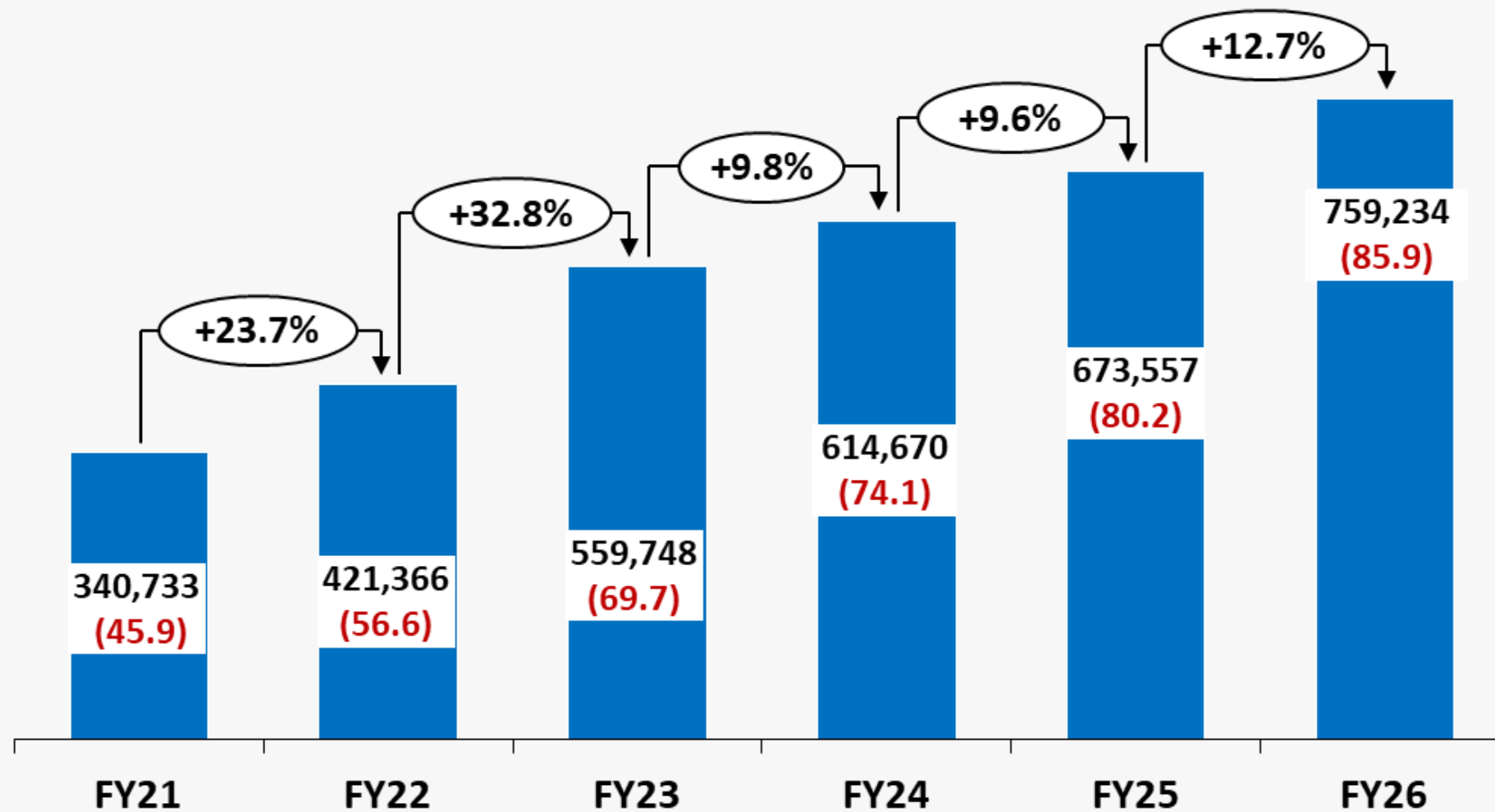


Strong domestic demand continues to drive revenue expansion across the auto-component sector.

FY 2026: Auto Component Industry Performance

FY26 – Auto components industry performance

 **Size of industry¹ | INR Cr (USD Bn)**
Includes Sales to OEMs, Aftermarket, and Balance of Trade



- Auto component industry grew 12.7% (in INR) in FY26
- Supply to OEMs grew by 16.3% due to significant growth in production volumes of vehicles
 - Passenger Vehicles ~ 10%
 - Commercial Vehicles ~13%
 - Two-wheelers ~12%
- Aftermarket grew by 9% supported by growing vehicle base and formalization of the market
- Exports grew by 5% and imports by ~13%
- Trade deficit stood at USD 1370 million
- Supply to EV segment accounts for 4.6% of sales to OEMs

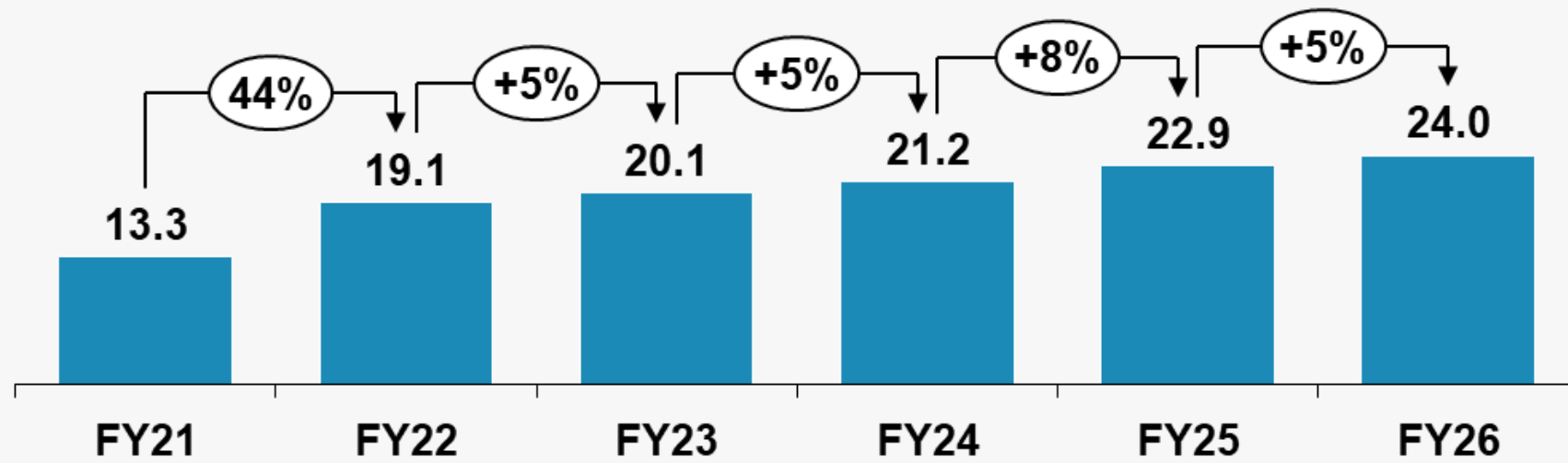
Growth % taken against INR Values

Source: PwC research, CRISIL, SIAM, includes Tractors, Construction Equipment

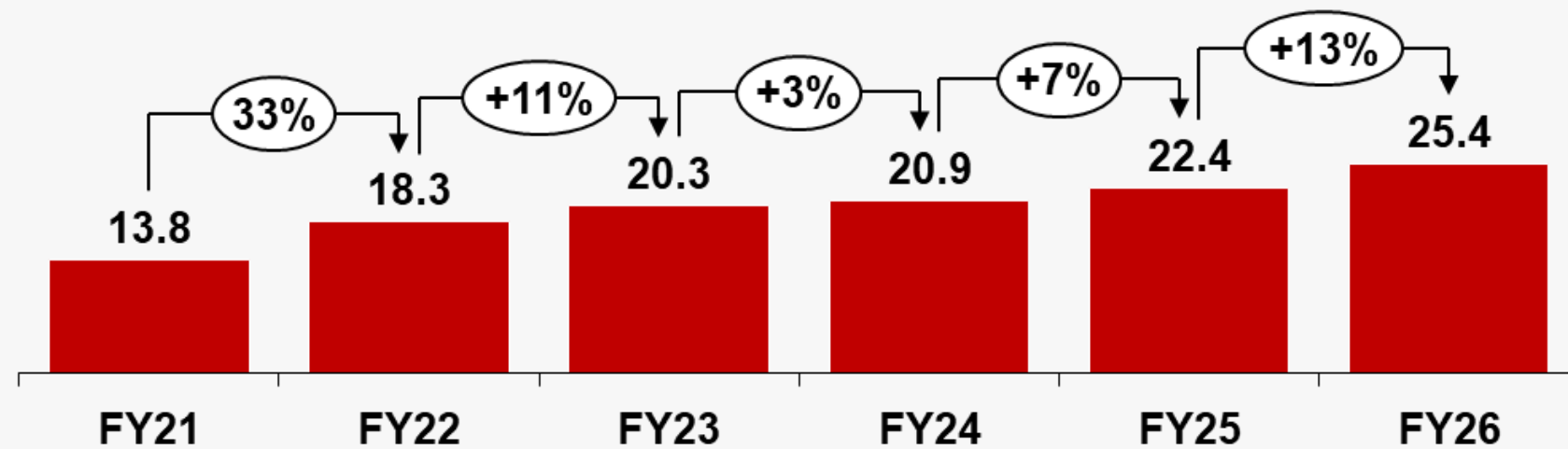
Notes: 1 - Excludes tyres, paints, powder coating, batteries & consumables
 2 - EVs include only Li ion battery operated vehicles. Cost of Li ion battery excluded from component consumption calculations
 3 - USD/INR rate for FY26 has been considered at 88.46, based on the average exchange rate data for FY26

FY 2026: Exports & Imports - Balance of Trade

Total Exports | \$ Bn.



Total Imports | \$ Bn.

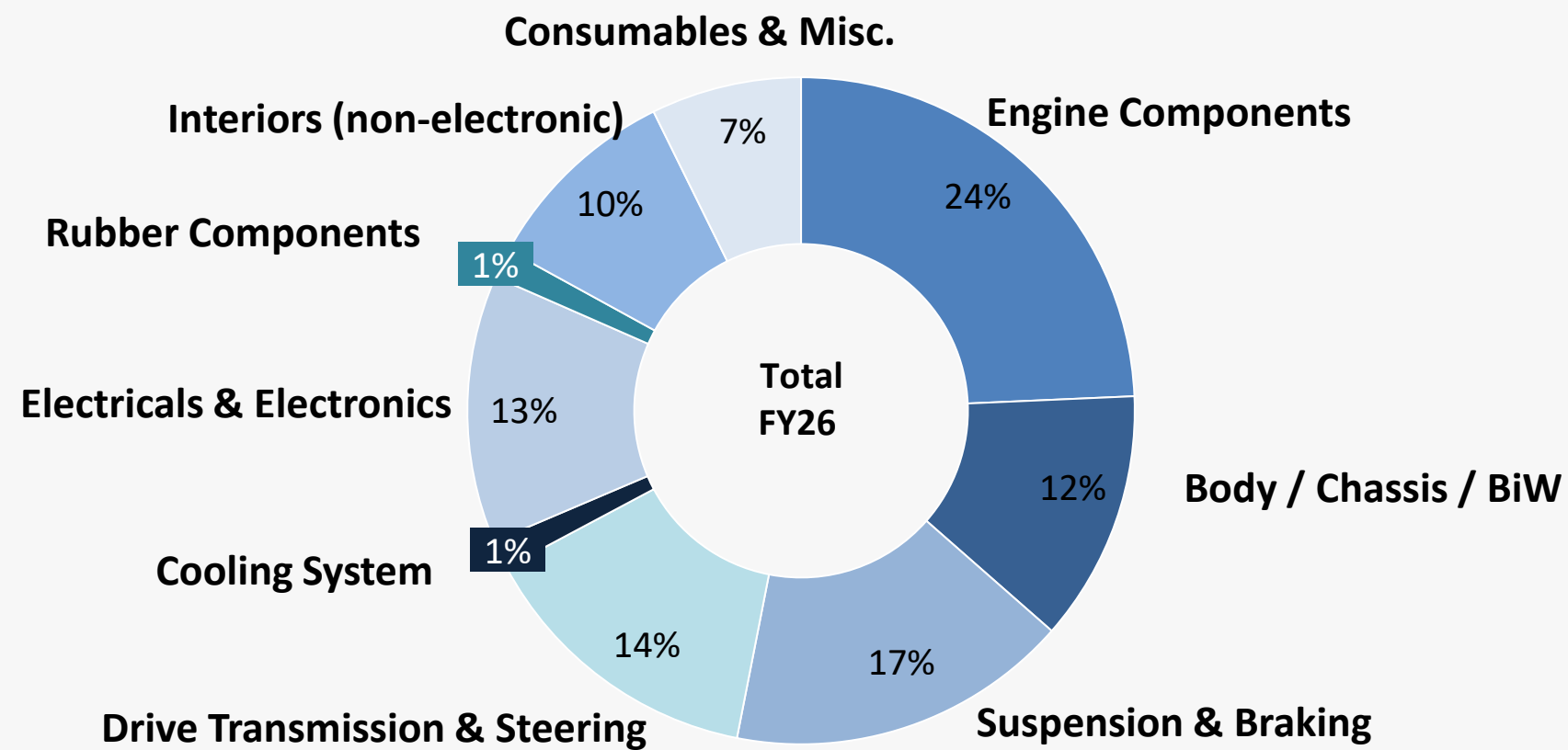


FY26 EXIM performance

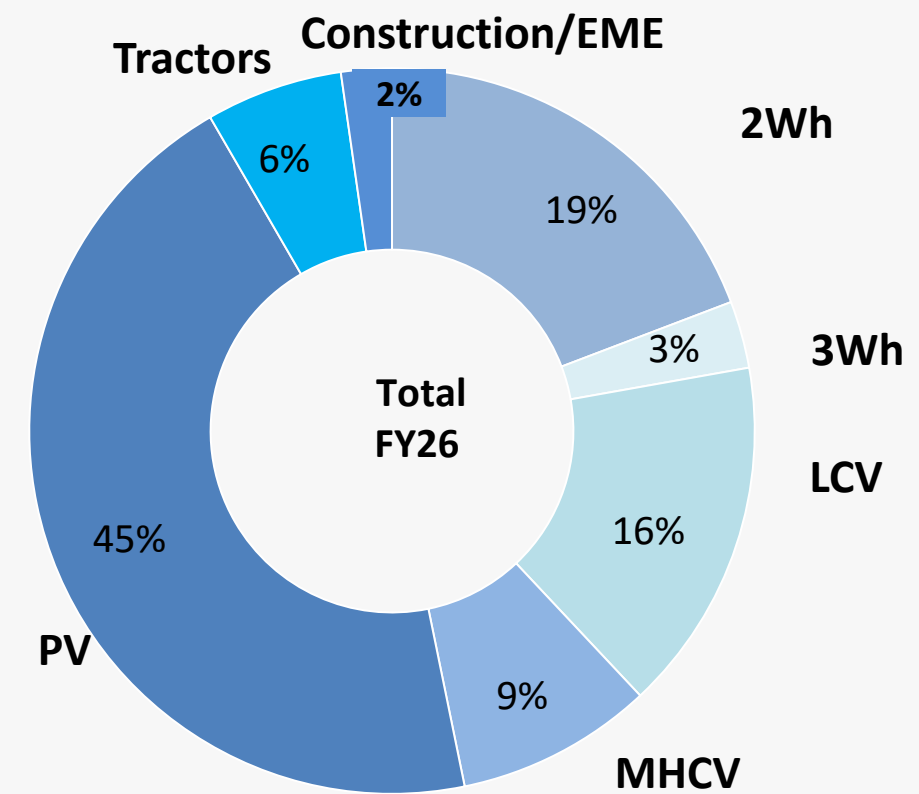
- Exports grew by 5% and imports by 13%.
- Europe saw the highest increase in exports, on expectations of a favorable FTA and European OEMs expanding procurement offices in India
- Engine components and Drive Transmission & Steering, account for more than half of exports.
- China, Japan and Germany were the leading sources of auto-component imports into India.
- Drive Transmission & Steering, alongside Engine, account for 56% of imports

FY 2026 : Sales by Category & Revenue from OEMs

Overall Component Sales By Category:

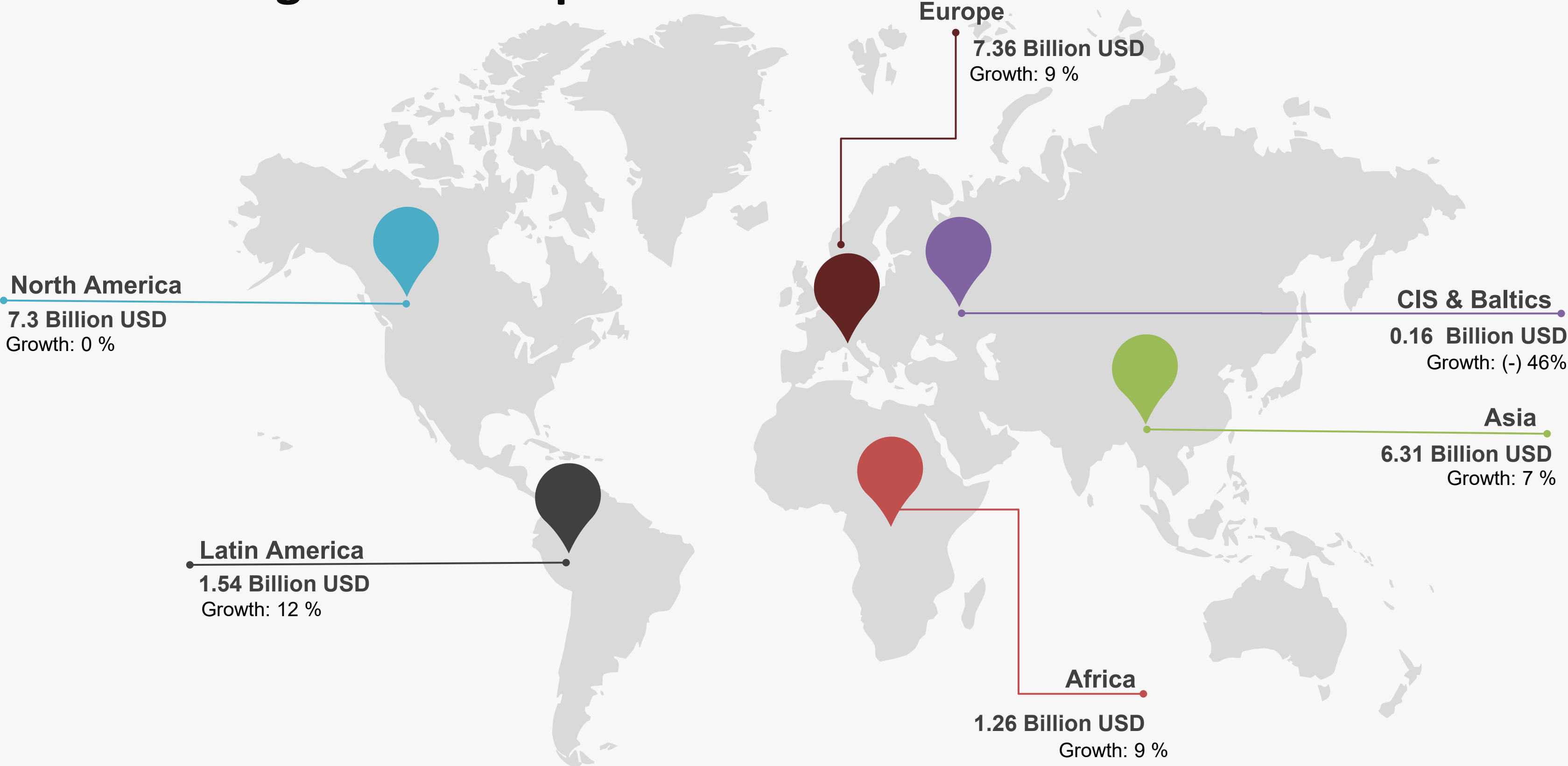


Component Sales to OEMs By Segment:

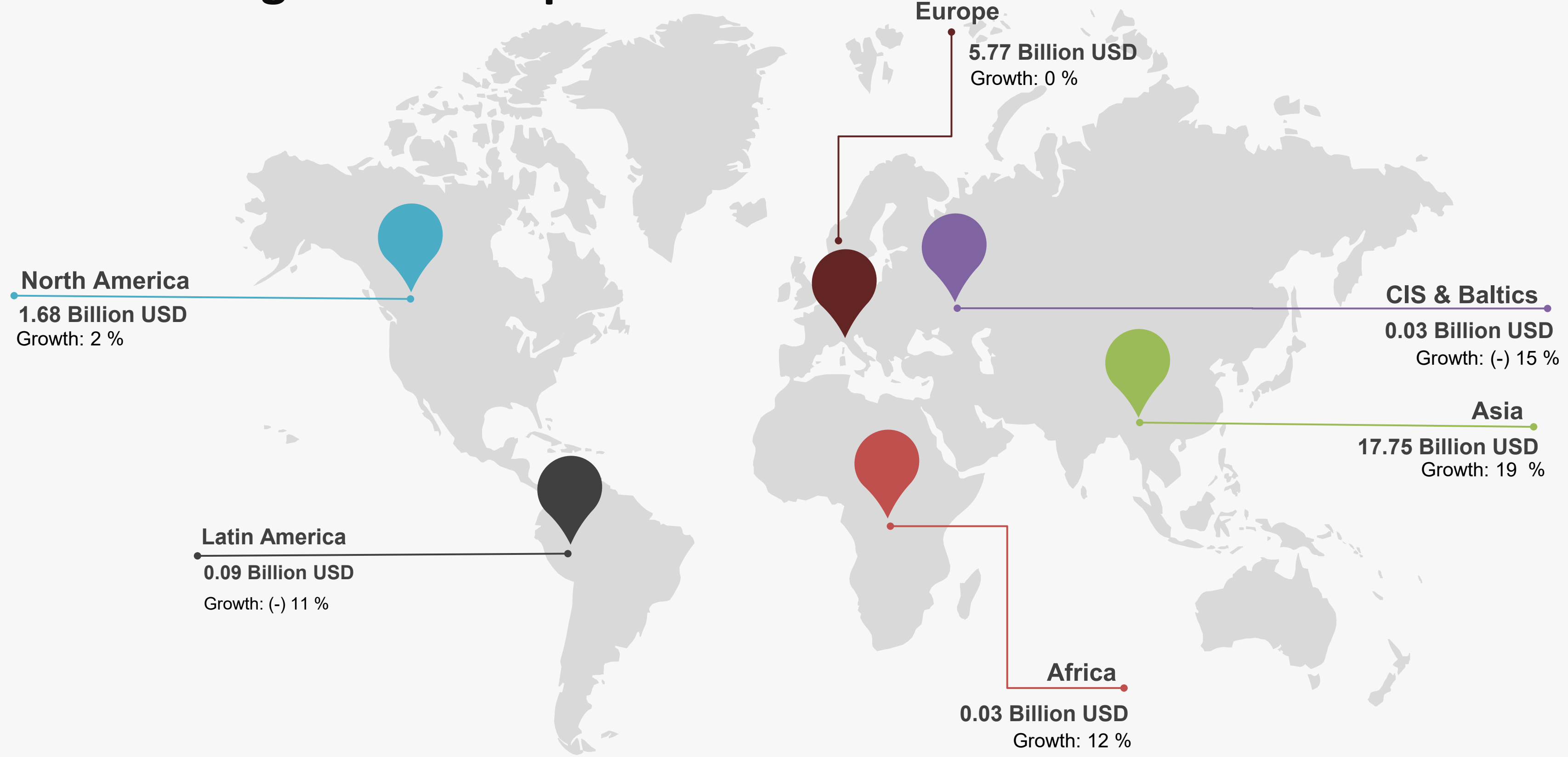


Total Supply to OEMs: INR 6,62,893 Cr. (USD 75 Bn)

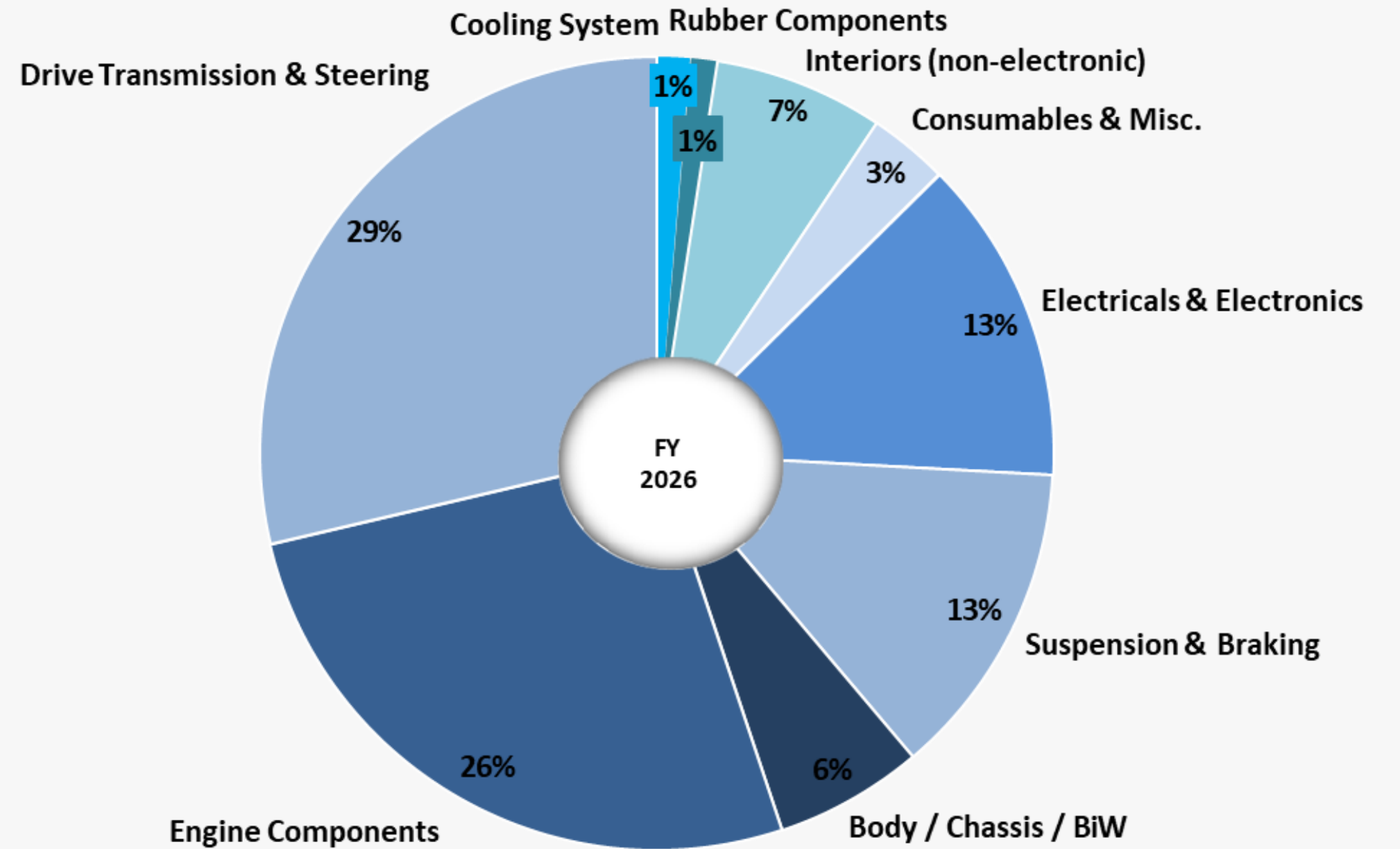
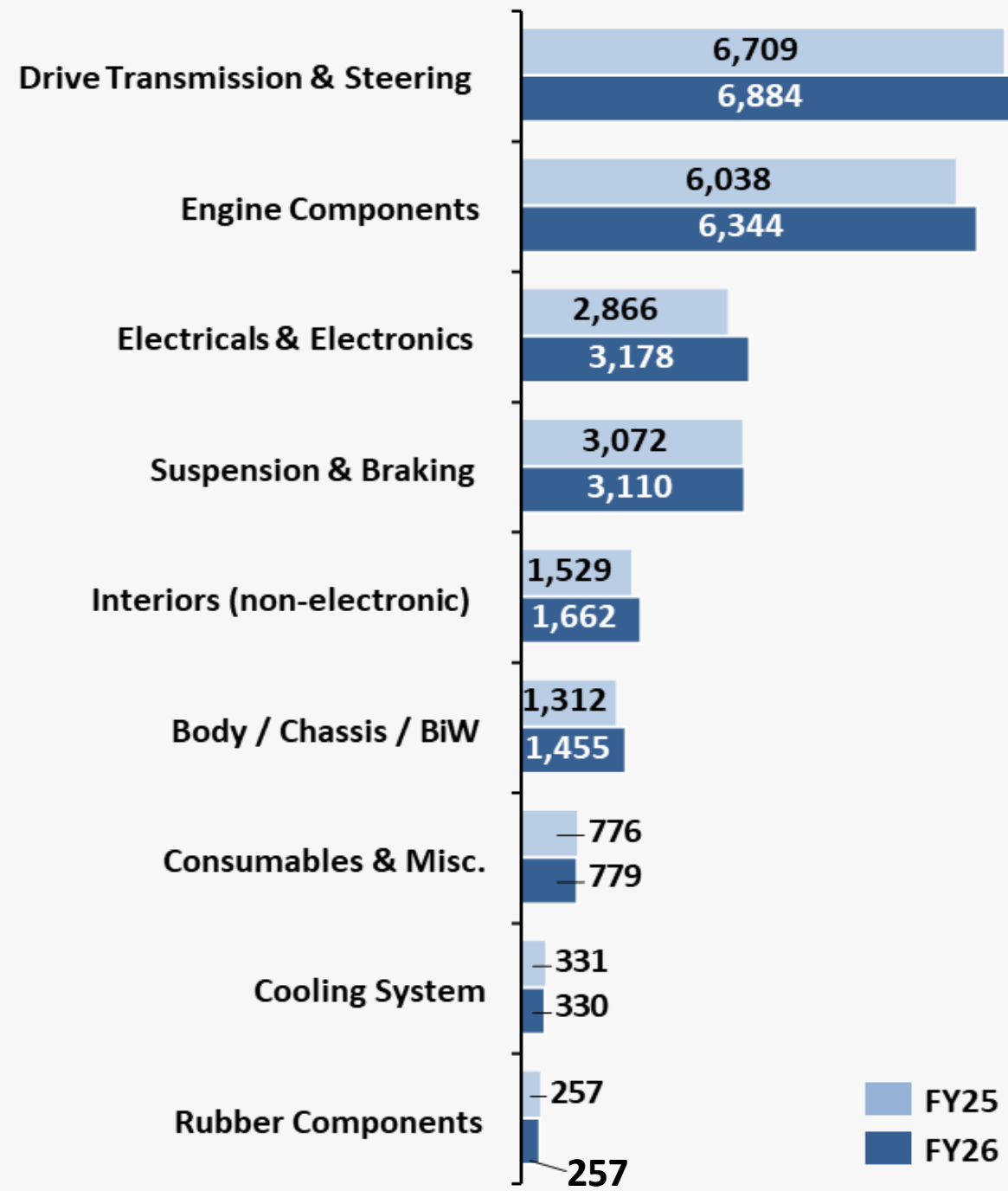
FY 2026: Region wise Exports



FY 2026: Region wise Imports

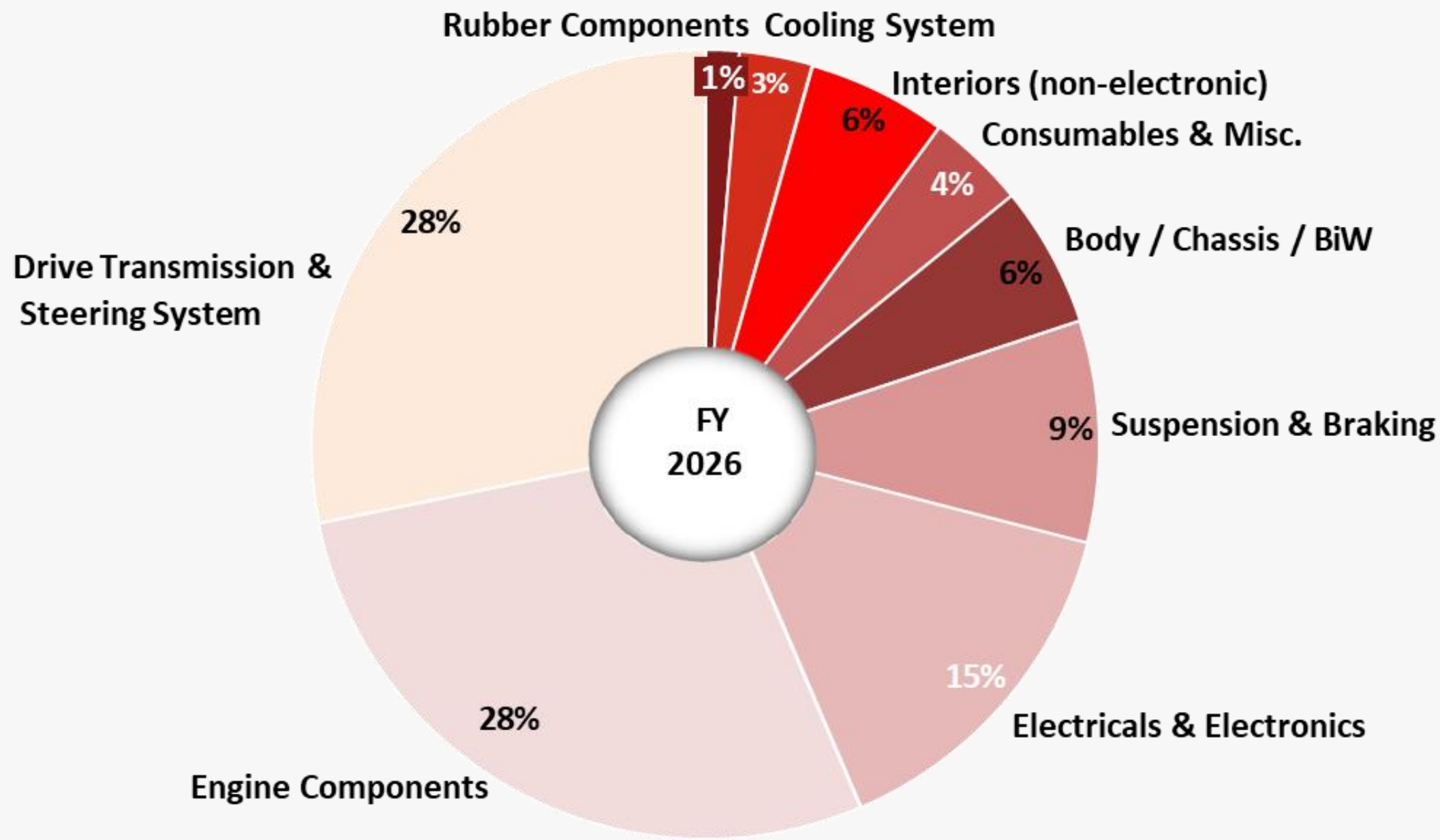
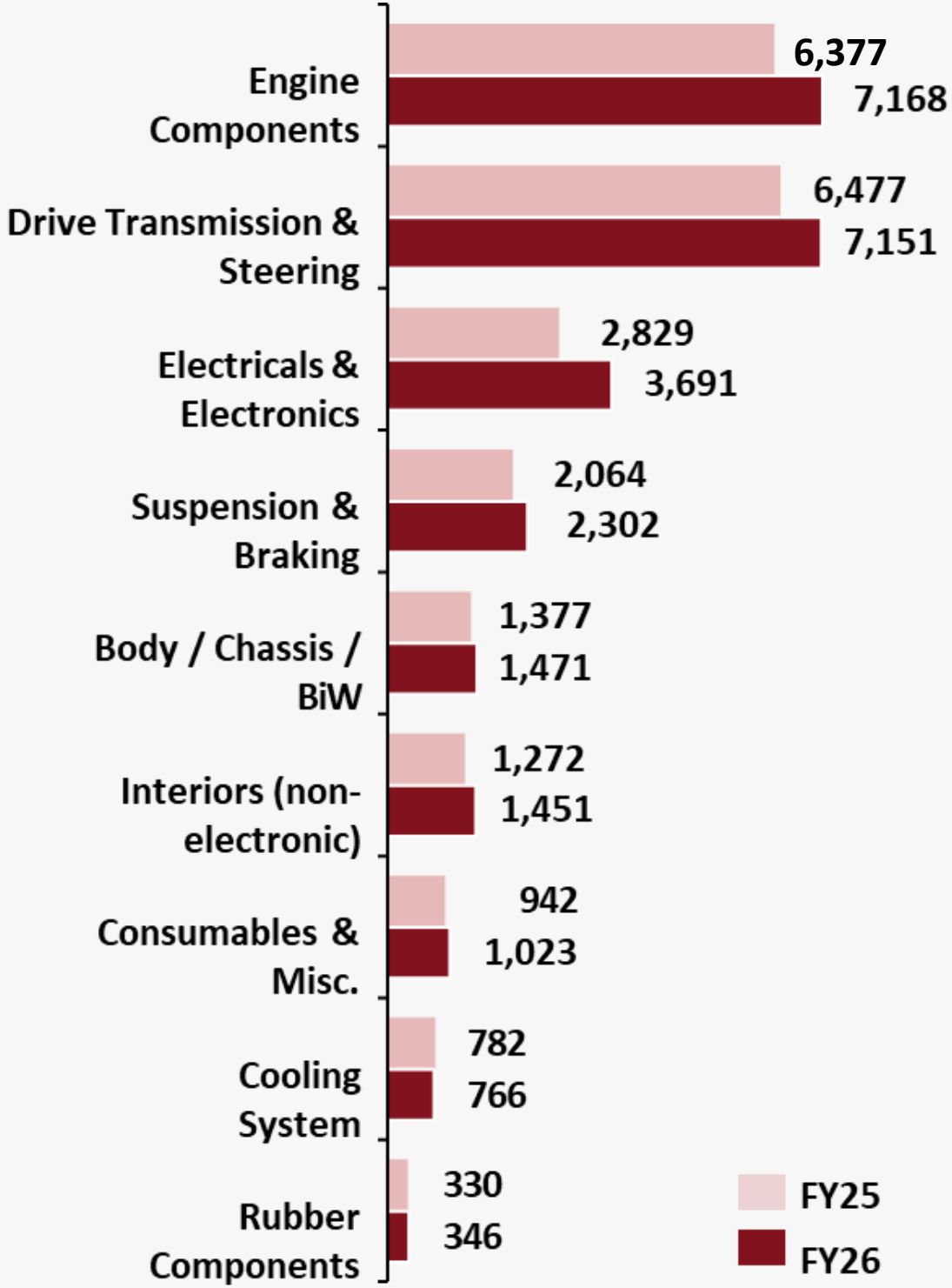


FY 2026: Exports Segmentation by Product Type



*values in USD Mn

FY 2026: Imports Segmentation by Product Type

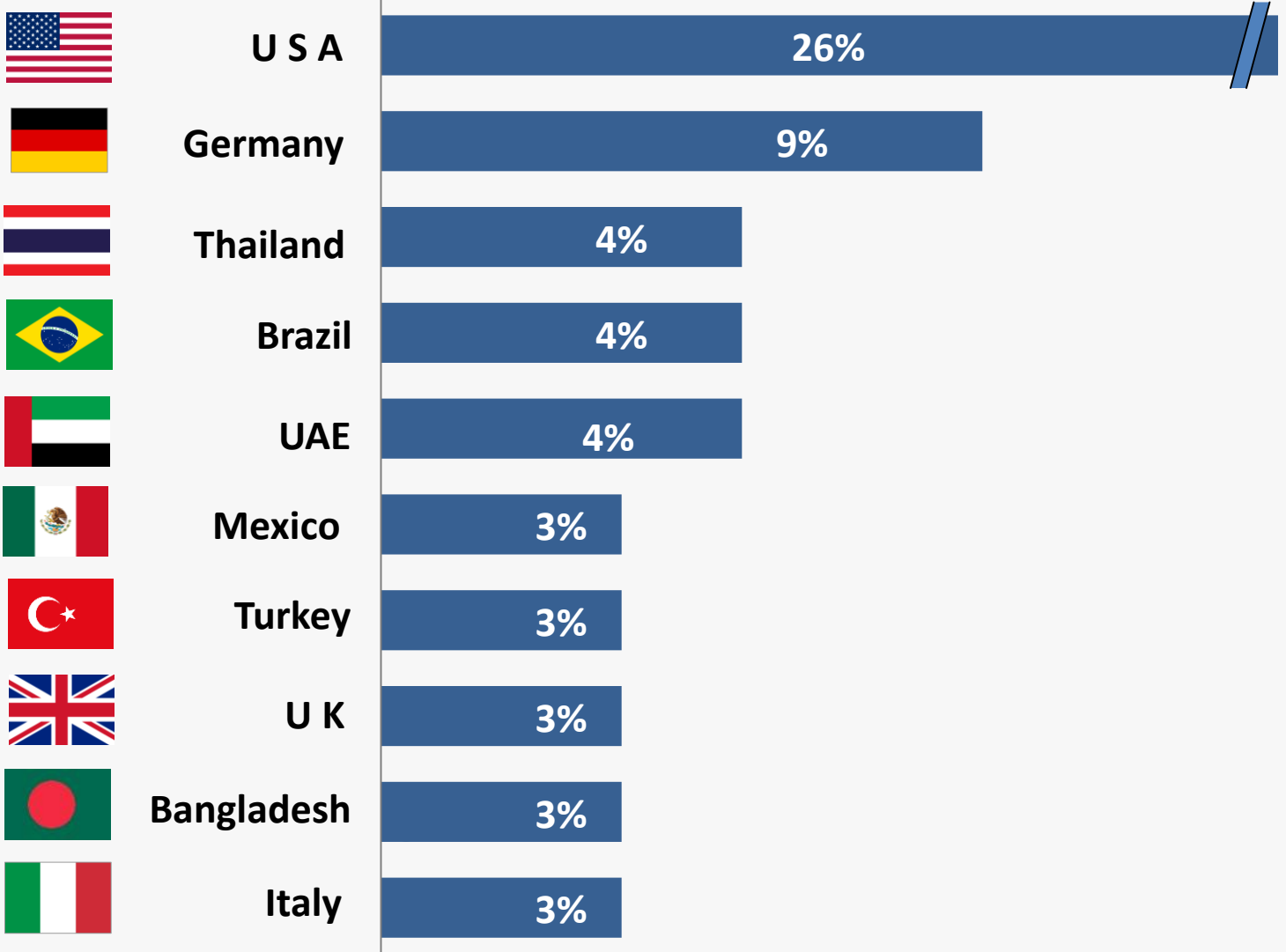


*values in USD Mn

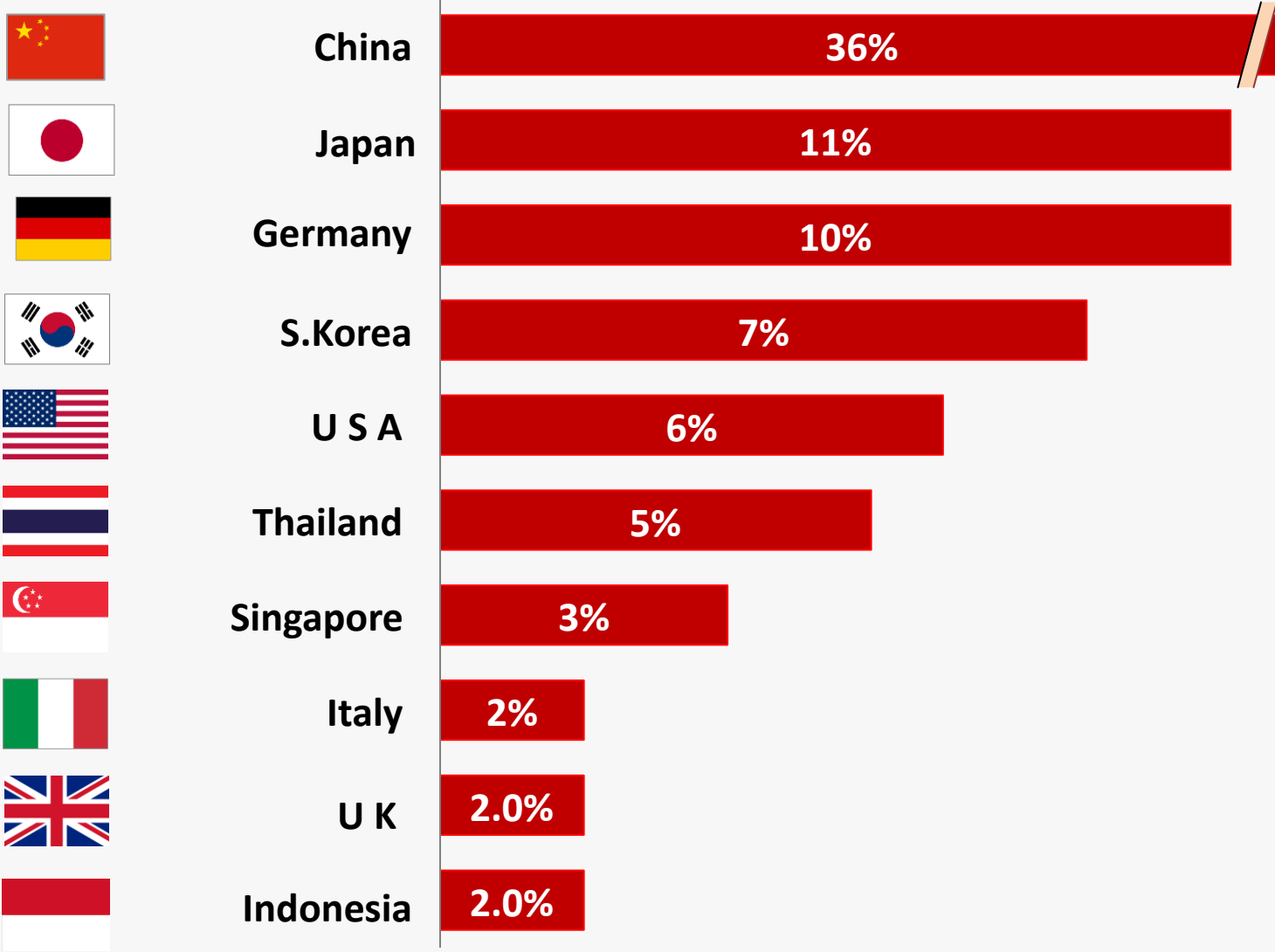
Top 10 Country wise: Imports & Exports

USA is key destination for exports while China is key source of imports

Exports (% of Total)

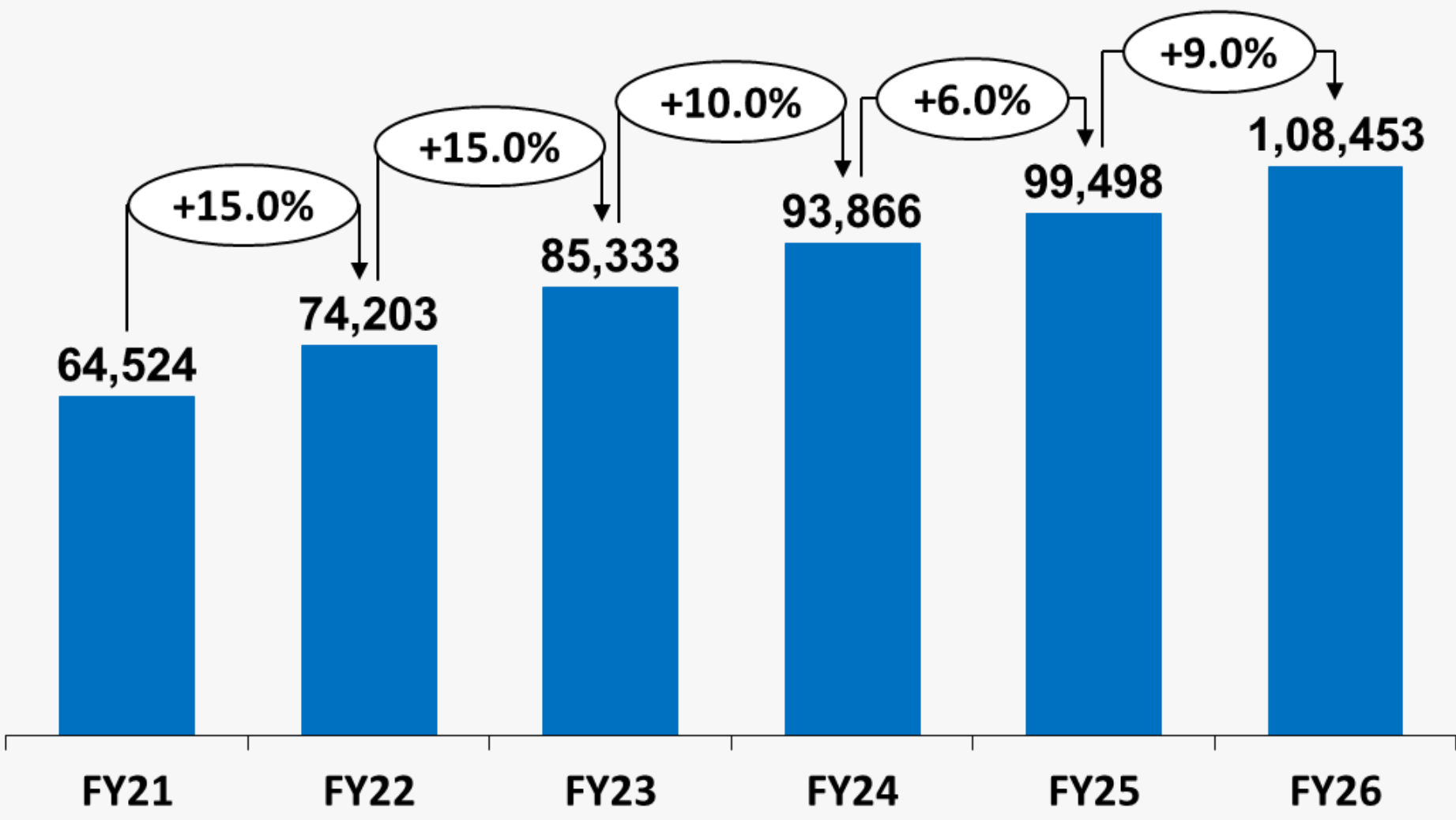


Imports (% of Total)



FY 2026 : Indian Auto Component Aftermarket

Aftermarket | **INR Cr**



FY26 Aftermarket

- Growth in the aftermarket segment can be attributed to:
 - Rise in demand for used vehicles
 - Shift in preferences towards larger/more powerful vehicles,
 - Increasing formalization of the repair and maintenance market

Summary: FY 2026 vs FY 2025

Figures in INR Crore	FY 2026	FY 2025	Growth Rate
Auto Components Supply to OEMs	662,893	570,145	16.3%
Aftermarket	108,453	99,498	9.0%
Exports	212,176	192,326	10.3%
Imports	224,287	188,412	19.0%
Industry Turnover	759,234	673,557	12.7%

Figures in USD Billion	FY 2026	FY 2025	Growth Rate
Auto Components Supply to OEMs	75	67.9	10.5%
Aftermarket	12.3	11.8	3.6%
Exports	24	22.9	4.8%
Imports	25.4	22.4	13.1%
Industry Turnover	85.9	80.2	7.1%

Tailwinds & Headwinds

Tailwinds

- Govt Focus: Carbon Neutrality
- FTAs deepening/opening new markets
- Emphasis on infrastructure development
- Growing Domestic Demand/Vehicle sales
- Largely Stable international demand/Exports
- Increased Investments and Capacity Expansion
- New entrants in mobility space

Headwinds

- Geo-political challenges – Russia-Ukraine/West Asia/US Tariffs/Chinese Trade restrictions..
- Non-availability of Rare Earth Magnets
- Raw Material Price Volatility
- Increasing Insurance & Freight Costs
- Labour Shortage

We cordially invite you to

66th ACMA Annual Session, 2nd September 2026,
Taj Palace, New Delhi



