

Welcome To



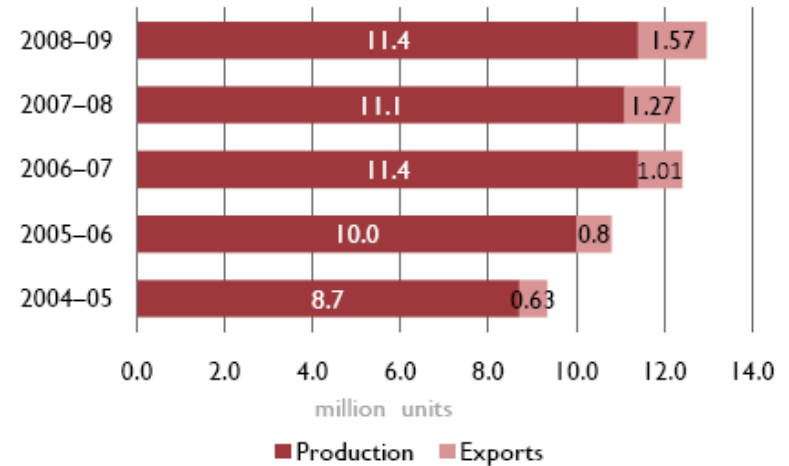
ASHOK LEYLAND



Overview of Automotive Sector in India

- The industry turnover is estimated to reach a level of US\$ 155 billion by 2016.
- Overall production of automobiles increased from 8.7 million units in 2004–05 to 11.4 million units in 2008–09.
- Overall vehicle sales increased marginally from 9.65 million units in 2007–08 to 9.72 million units in 2008–09.
- Between 2000 and 2009, the industry witnessed a cumulative FDI flow worth US\$ 4.3 billion accounting for 4 per cent of the total FDI into the country.

Production and exports of automobiles

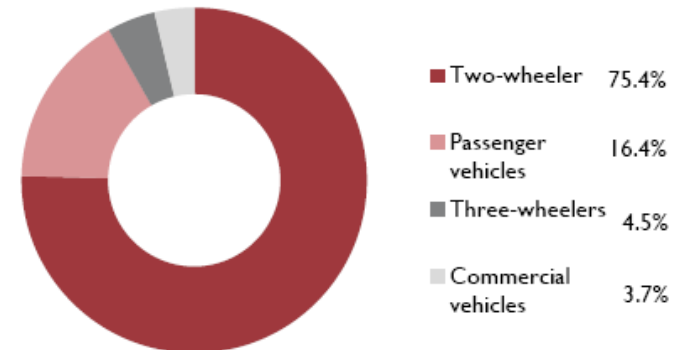


Source: Society of Indian Automobile Manufacturers (SIAM), www.ibef.org



Source: www.ibef.org

Segment share of automobiles in 2008–09 (production)

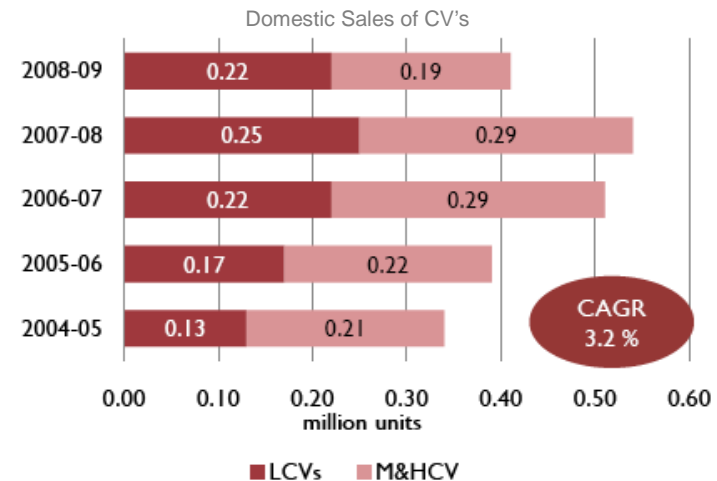


Source: SIAM, www.ibef.org

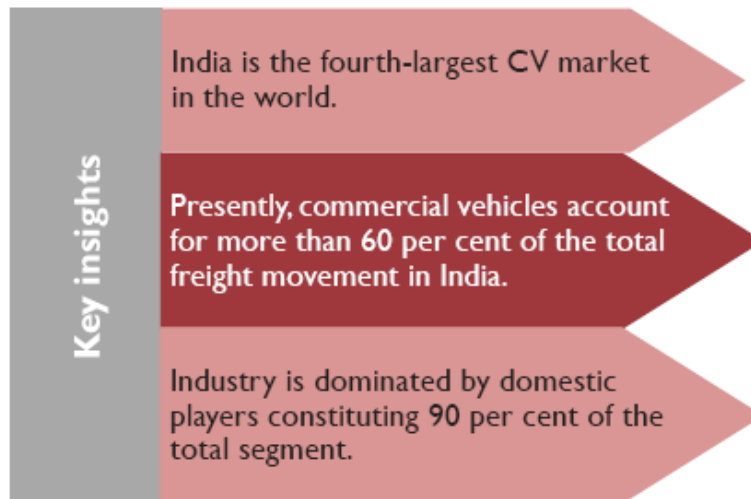


Overview of the Commercial Vehicle (CV) Segment in India

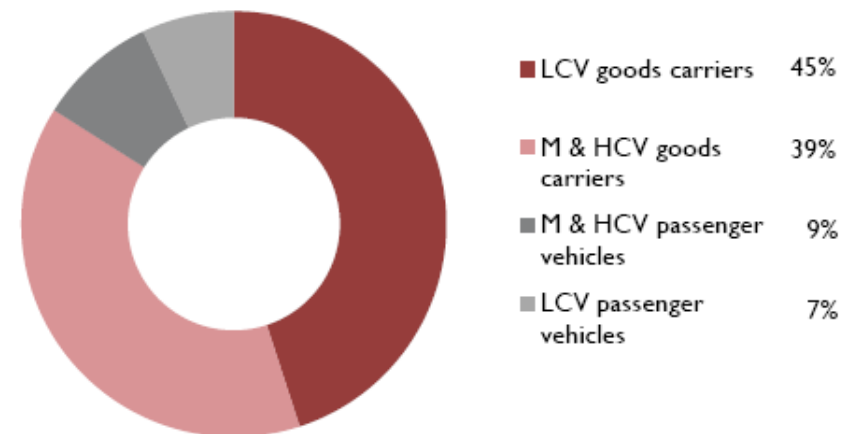
- Domestic sales of CVs have grown at a CAGR of 3.22 per cent from 0.35 million units in 2004–05 to 0.41 million units in 2008–09.
- The industry is dominated by domestic players such as Tata Motors, Ashok Leyland, M&M and Eicher Motors.
- Growth in industrial activity and increasing road penetration are likely to increase the CV sales to one million units by 2020.



Source: Society of Indian Automobile Manufacturers (SIAM), www.ibef.org



Source: Ernst and Young Analysis, www.ibef.org



Source: SIAM, www.ibef.org



The Hinduja Group



Hinduja Group

Over 90 years

India's first transnational conglomerate

Entered India with acquisition of Ashok Leyland in 1987

Present in 32 countries, employing over 35,000 personnel across 9 business sectors

Privately owned by the Hinduja Family



Ashok Leyland History

1948	Ashok Motors was set up in what was then Madras, for the assembly of Austin Cars.
1955	The Company's destiny and name changed soon with equity participation by British Leyland and Ashok Leyland commenced manufacture of commercial vehicles
1987	Hinduja Group took over the overseas holding by Land Rover Leyland International Holdings Limited (LRLIH)
1993	We became the first in India's automobile history to win the ISO 9002 certification
1998	QS 9000 certification
2002	ISO 14001 certification for all vehicle manufacturing units
2006	The first Indian auto company to receive the latest ISO/TS 16949 Corporate Certification
2009	Compliance with the TS 16949 2009 version



Ashok Leyland at a Glance

Over five decades in the Commercial Vehicle (CV) space

India's second largest CV manufacturer

Profitable track record and an uninterrupted dividend history since inception

Ashok Leyland has seven manufacturing plants with state-of-the-art facility at Pantnagar

More than 600,000 Ashok Leyland vehicles ply on the roads transporting people and goods

60 million people travel on Ashok Leyland buses every day

With over 50,000 vehicles to date, Ashok Leyland is the largest provider of logistics vehicles to the Indian Army

Public Transport solution provider

Application based product solution provider for cargo and special application like mining and construction

Enjoys over 85% market share in marine engines

Ashok Leyland exports commercial vehicles to more than 30 countries



Ashok Leyland

Associate Companies

Lanka Ashok
Leyland



Associate Coaches &
Components Ltd
(ACCL)



Hinduja
Foundries



Irizar TVS



Ashok Leyland Project
Services Ltd



Joint Ventures

AVIA Ashok
Leyland Motors



Defiance Testing
& Engineering



Nissan Motor
Company



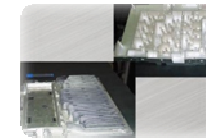
John Deere &
Company



Automotive
Infotronics



Ashley Alteams



Albonair GmbH



Optare



Ashok Leyland Milestones



Pioneers in Double
Decker bus

Pioneers in Vestibule
bus

Self-certification
status for Defense
supplies

India's first and no.1
manufacturer of CNG
powered bus

Introduction of Hybrid
Electric Vehicle

ISO 14001
certification for all
manufacturing units



Ashok Leyland – Product Portfolio

Buses

- 19 to 80 Seater

Trucks

- 7.5Ton to 49Ton GVW

Defense

- Stallion 4X4 / 6X6
- FAT 4X4 / 6X6
- LRV 6X6
- TFF 4X2
- Water Bowser

Engines

- Genset – 15 – 250 KVA
- Industrial – 40 – 250 Hp
- Marine – 42 – 200 Ps

Ashok Leyland Bus Range

12M - ULE



Panther



Viking SLF



Lynx



Vestibule Bus



Stag



Viking



Vestibule MegaBus



Double Decker



*NOTE: Vehicles shown above do not cover the entire range of Ashok Leyland buses

Ashok Leyland Truck Range

AVIA



8014



9016



2516



4921



SCISSOR LIFTING PLATFORM



GARBAGE COMPACTOR



TIPPER APPLICATION



INBOUND LOGISTICS



RMC



*NOTE: Vehicles shown above do not cover the entire range of Ashok Leyland trucks

Ashok Leyland Defense Range

**What drives the
Armed Forces ?**

PRODUCTS



STALLION 4x4 MK IV



STALLION TFF 4x2



**LIGHT RECOVERY
VEHICLE 4x4**



**STALLION 4x4
5 KL WATER BOWSER**



**HIGH MOBILITY
VEHICLE 6x6**



COMET 4x4



**F23 6x6 CRASH
FIRE TENDER**



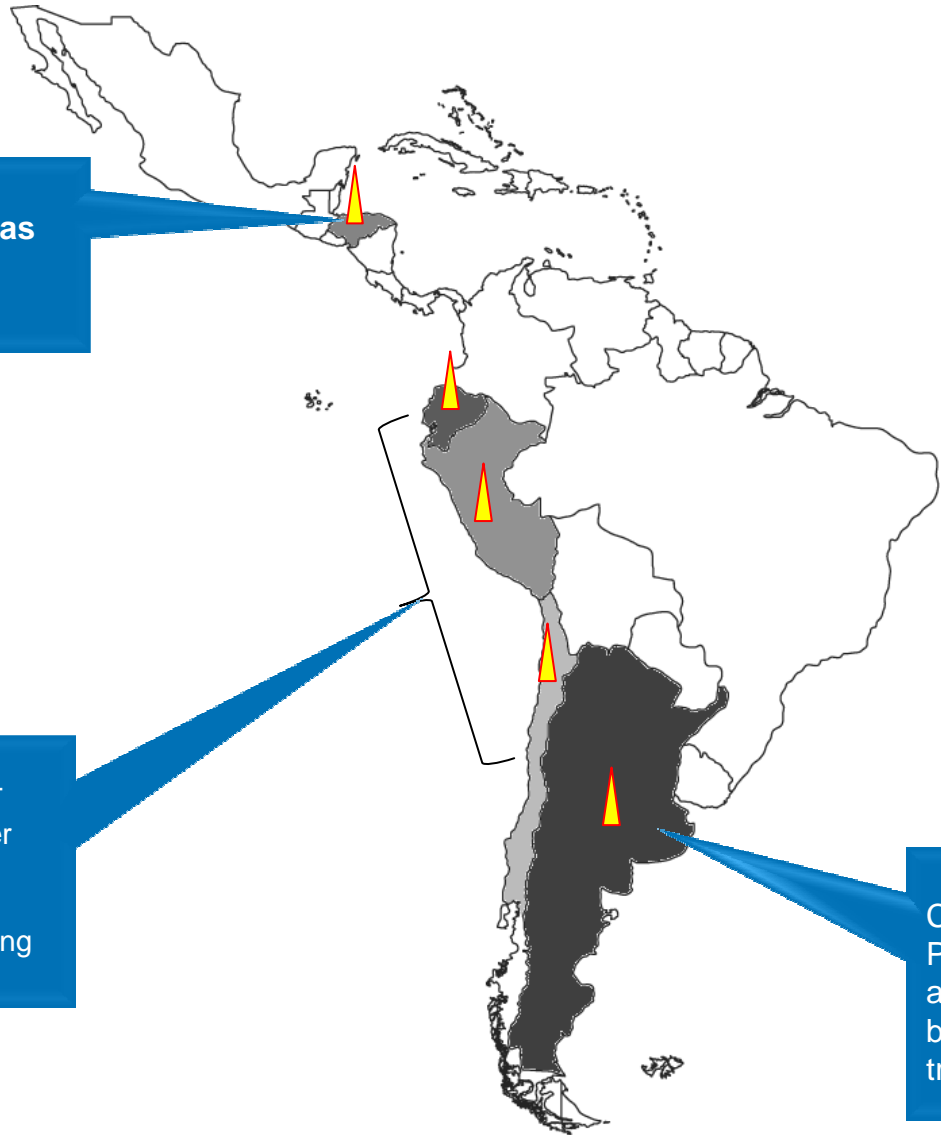
Ashok Leyland - LAM Presence

▲ - LAM Presence

Supplied 110 nos. stallion to **Honduras** army for logistic support

- Distributor Presence in **Peru, Chile and Ecuador** for 9-15T GVW trucks and 25-40 Seater bus
- Technology transfer for building bodies

Collaboration with TATSA of PLASA group, **Argentina** for assembly and distribution of buses and trucks for public transport





Ashok Leyland Expertise for LAM

Rugged Vehicles for all operating condition

Proven Technology and Aggregates. Vehicle reputation of meeting varied requirements on global scale

Diversified portfolio

On going portfolio up-gradation to meet regulatory requirements in LAM

Competitively priced public transport solution



THANK YOU