

Auto Expo India, 2020 – A Review

March, 2020



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OVERVIEW OF AUTO EXPO 2020



Auto Expo 2020 was focused towards new technologies and innovation in the auto industry

- The 2020 edition aimed at creating an alluring experience for the visitors by resurrecting a new brand image which was not only focus on static display of motor vehicles, but had focussed on ‘Entire Mobility Eco-System’, enveloped by the theme of **“Co-Create, Co-Exist and Celebrate”**
- This metamorphosis has not only rechristened the image of ‘Auto Expo – The Motor Show’ internationally, but also allowed the discerning visitors to experience, comprehend and appreciate the kaleidoscopic journey of the automobile industry, especially over the last 20 years
 - Korean and Chinese passenger vehicle brands focussed mostly on EV – portraying the future of Indian industry along with their capabilities in next generation technological features, safety features
 - Other European, Japanese and Indian brands also showcased their capabilities in EV, however, focus was mostly on new/upgraded models which are technologically superior, more safe and having new-age sharing and connect features etc.
 - 2 – wheelers section mostly focussed on EV 2 – wheelers (Chinese, Japanese, except Suzuki and indigenous players); there were few electric 3 – wheelers also catering to the cargo segment



Exhibitors & Absentees at Auto Expo 2020

Exhibitors

- In addition to exciting players, new comers from China (GWM and Haima) and start-ups in e- two wheelers (Okinawa, EeVe) participated this expo.

4 Wheeler Brands

Maruti Suzuki	Mercedes Benz
Tata Motors	Volkswagen
Hyundai	Skoda
Kia	Renault
MG Motors	Mahindra & Mahindra
GWM	Force
Haima	

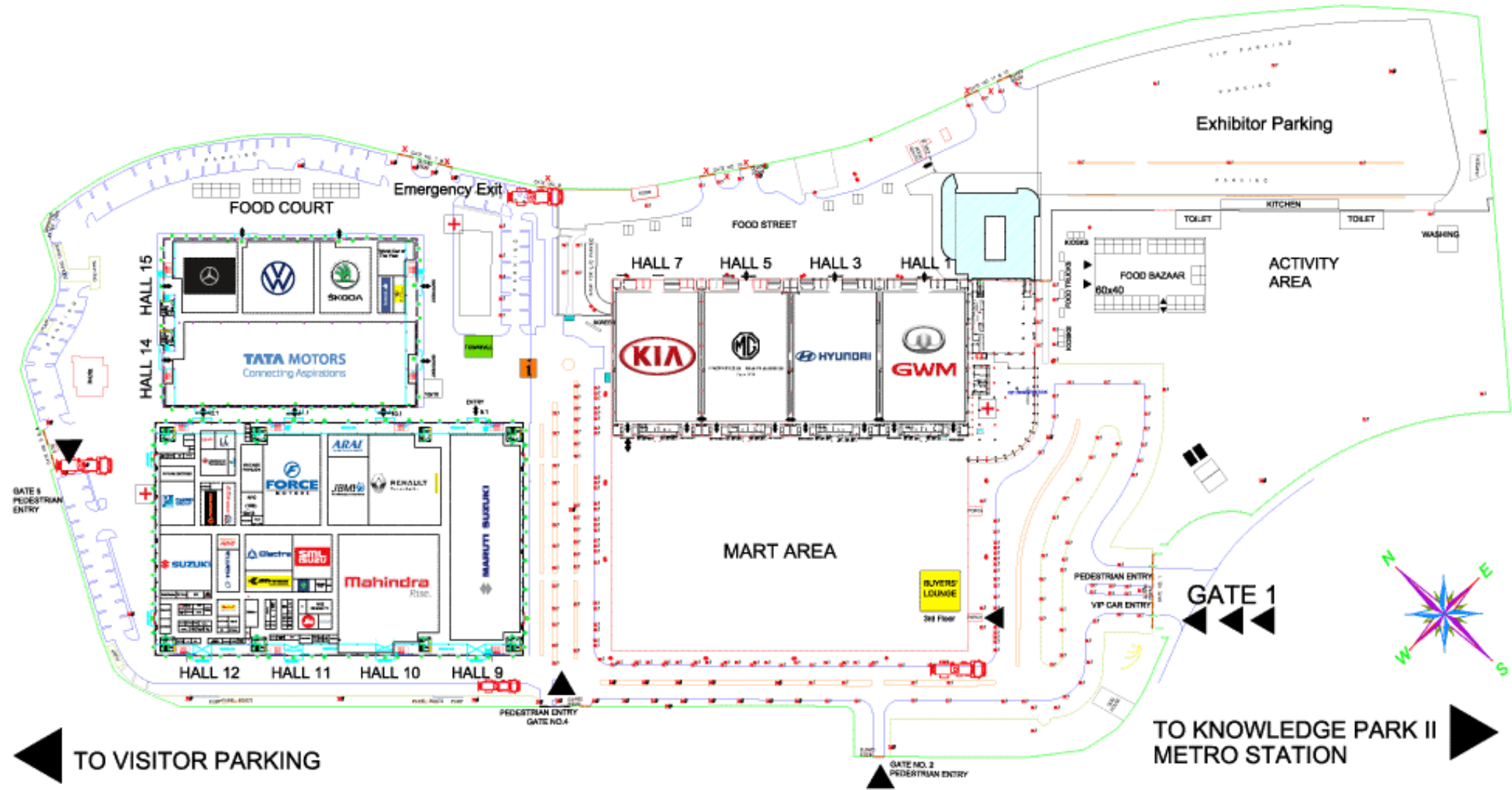
2 Wheeler Brands

Suzuki
Aprila
Vespa
Mot Guzzi
Okinawa scooters
Hero Electric
EeVe

Absentees

- More than a dozen automakers were missed this time, including regulars such as **Hero MotoCorp, Honda Motorcycles and Scooters India, TVS, Yamaha Motor India** within two-wheeler segment, likewise key passenger vehicle OEMs such as **Honda Cars India, Toyota Kirloskar Motor Ltd, Audi, BMW, Ford and Nissan** as also Ashok Leyland, VE Commercial Vehicles, Scania among the Commercial Vehicle OEM
- Other absentees included Royal Enfield, Harley Davidson, Triumph motorcycles, Bajaj Auto, Eicher Motors, Jaguar Land Rover, and Volvo Cars India, but these companies have given the event a miss in the past as well

The Expo Layout



Source: <http://www.autoexpo-themotorshow.in/wp-content/uploads/2020/02/layout-for-website.pdf>

Auto Expo 2020 – at a Glance

Total Footfalls **6.08 L**

Total No. of Product Displayed **352**

Total Companies Participated **108**

Launches and Unveils **75**

New Concept Showcased **15**



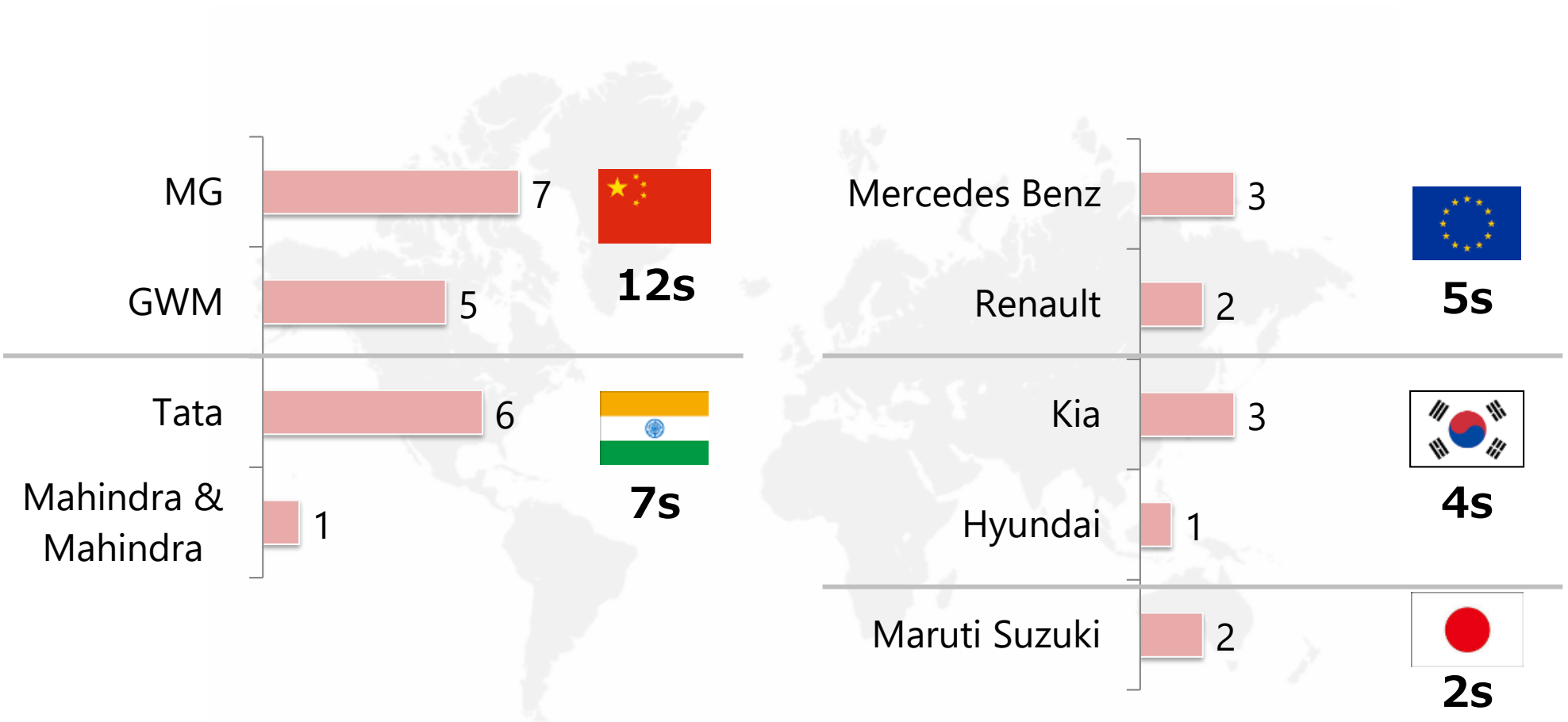


PAVILION EVALUATION



Most Attractive Pavilion as per Visitors

MG and Tata achieved highest interest by the visitors, and Chinese OEM grabbed highest attention when compared to OEMs from other countries.



Morris Garages

7 respondents considered as most interesting pavilion

- Showcased the old British culture and tradition
- The pavilion was decorated with brick style theme – highlighting the traditional and legacy of the brand
- Old British vintage car and their replica – showcasing pioneer British technology and trust
- Complete demo of electric vehicle and how the electric engine operates – through a transparent demo car
- Variety of electric car models focussing for Indian roads
- Internet car – attracted the customers to experience the pavilion of technological features (including MG connect)

[Voice of visitors]

“The vintage car models displayed in MG pavilion were awesome and it is expressing the age old pioneer technology and British legacy as well...”

“Overall ambience and display of the cars was awesome... the telephone booth structure was wonderful...”

“The attraction was electric car mechanism display... So many electric cars were displayed...”



Tata Motors

6 respondents considered as most interesting pavilion

- Largest pavilion: eco friendly and go green makeover – grass carpet and wall across the pavilion
- Artificial elevated test drive ramp - A first in India
- All types of vehicles displayed – from passenger cars to commercial vehicles
- Tata Sierra concept was the top most attraction
- Separate demo space for all the car models displayed – Altroz display description was innovative
- Sharing concept – the new Tata initiatives to adopt future technology

[Voice of visitors]

“I was really surprized to see the Tata pavilion... it was so huge... grass form carpet was spread everywhere... an Indian brand showing eco-friendliness... all the vehicles were displayed...”

“Tata pavilion has done a remarkable thing first time... I visit expo every time and noticed that they have created elevated test drive ramp in the pavilion itself... Hope they have considered all the safety concern to prepare it here...”



Great Wall Motors

5 respondents considered as most interesting pavilion

- Vibrant & energetic lighting combination – entire pavilion was highlighted with multi-colour lighting combinations
- Overall pavilion colour combination
- Big display of air bags – safety features
- Strong and sturdy cars are in display – majority are SUVs
- All cars – level 2 autonomous
- Driverless level 3 autonomous concept car showcased
- The map showcasing the footprints of GWM globally
- Focus on EV and the varieties displayed
- Courtesy of the staffs and their demonstration

[Voice of visitors]

“The vibrant colour of the pavilion is amazing... the car models were displayed very nicely so that everyone can see the complete car even if crowd is there...”

“Safety display at GWM pavilion nicely positioned...”

“GWM is considered as the world’s leader in SUV market and hence interest was there... overall pavilion didn’t disappoint...”



Kia

3 respondents considered as most interesting pavilion

- Very well lit pavilion and Seltos and Carnival were the key attraction of the pavilion
- Kia showcased its electric vehicles which are technologically equipped advanced car
- The experience of driving a Kia car – experience via 3D driving exposure
- Actual Kia engines were displayed
- Kia connected service which is provided to all purchasers was introduced

[Voice of visitors]

“Both the models Sonet and Carnival were the key attraction and the way they were displayed and highlighted was innovative...”

“I had taken an experience of 3D driving of Kia cars... although there was a long que, however, the experience was good...”

“The technology packed pavilion and the intention was to visit this stall just to know their success in India...”



Mercedes Benz

3 respondents considered as most interesting pavilion

- The only luxury brand that participated in the expo and the colour theme of the pavilion was most elegant – highlighting the luxury and premium brand value
- Entire set of luxury cars in all price ranges was displayed
- For existing customers of Mercedes, it arranged an audio session for detailed specifications of all the cars
- Maybach and Marco Polo were the key attractions; luxury, comfort, richness etc. were demonstrated through the display of Marco Polo
- It also showcased its presence in EV – with EQC 400; expected to be launched in India in Apr 2020

[Voice of visitors]

“The Mercedes Benz stall was the only luxury pavilion and a must visit... they have displayed all the product range and ambience itself was classy type... they also provide free gifts to all the visitors...”

“The best car shown in the pavilion is the Marcopolo... really a world class vehicle and luxury unlimited...”

“Must visit pavilion as it is the only luxury brand here...”



Maruti Suzuki

2 respondents considered as most interesting pavilion

- Maruti showcased its complete range of products
- The key attraction for the pavilion – Jimny , Futuro E
- Well organized display of car models
- Separate NEXA pavilion showcasing the next generation image of the brand
- The media centre in between the pavilion

[Voice of visitors]

“Jimny model is very well known and old model... I am excited to see the model and will be eagerly waiting for its launch...”

“Maruti brand is close to every Indian... therefore, a must visit pavilion... space utilization was so well managed that even in crowded Sunday, we didn't face any issue see displayed car...”

“The media centre in between the pavilion was attractive and never saw in any other pavilion...”



Hyundai

1 respondents considered as most interesting pavilion

- Key attraction was Creta full make over launch – inaugurated by Shahrukh Khan
 - The fully automatic next generation car (displayed as a concept car) – Le Fil Rouge
 - Hyundai Kona was showcased – the EV model for future generation of India
 - The Hyundai connect App was highlighted – Blue Link: the app operation was displayed in a big screen and it was interactive and user friendly
- Games activity area and 4D theatre were attractions

[Voice of visitors]

“I am a Creta user and just came to Hyundai pavilion to check the new Creta face lift version... I purchased my car 4 – 5 months back and if I knew that this model is going to get launched, I could have postpone my decision...”

“Got information about Hyundai cars more in details in 4D theatre, which was a pleasure experience...”

“The Hyundai connect App and its interactive functionality display is what a customer wants to see...”



Attractive Models which Pulled the Crowd



Mercedes Marco Polo



Force Gurkha



Maruti Jimny



GWM F7/F7X



Hyundai Creta New Edition



Mercedes AMG GT

Attractive Models which Pulled the Crowd



Skoda Karoq



Kia Carnival Hi Limousine



Hero Electric Trike



MG GT



Suzuki Katana

Concept Cars Showcased



Futuro E – Maruti



Funster – Mahindra



Le fil Rouge – Hyundai



Sonet – Kia



Marvel X – Morris Garage



ID Crozz – Volkswagen

Concept Cars Showcased



Vision IN – Skoda



Sierra – Tata



HBX – Tata



GWM Haval Concept H



RS 2027 – Renault



SYMBIOZ – Renault



PERCEPTION TOWARDS BRANDS



Perception on Brand and Country of Origin: Chinese Brands

- Indian consumers considered Chinese cars are “value for money” and are not concerned about product’s quality. They perceived MG/ GWM as globally established brands, instead of Chinese brands

MG

- A confusion is there whether Chinese or British
- Feature loaded – internet car
- Started penetrating & competitive
- Superior in electric vehicle

GWM

- New entrant in India – must be competitive
- A global SUV leader
- Sturdy by body build
- Focus on safety and technology

*“Chinese brands are **not always bad**... if you see the mobile industry, every mobile is assembled or manufactured in China or Taiwan... in the same sense, car manufacturers from China may rule the market if they sustain with quality...”*

*“Chinese cars in China are of **very good quality and globally recognized**... if they maintain the same quality as it is there in China, definitely Chinese brands will penetrate the Indian market...”*

*“How can you say Chinese brands are bad... **Great Wall Motors have 17% market share in Global SUV segment and it is known for that**...”*

*“**MG (Morris Garage)** although now owned by Chinese company, it is actually **a British origin brand**... it carries that British legacy and hence, don’t think that the quality will be bad... **MG Hector already well penetrated** in the market ...”*

Perception on Brand and Country of Origin: Korean Brands

- Kia is also perceived as value for money car because of lucrative features with affordable price range

KIA

- The number 1 selling car brand in India as of now
- Feature loaded car
- Value for money
- Poor after sales service

Hyundai

- Perfect car for Indian roads – high visibility
- Innovative
- Good body build
- A market leader as of now

*“20 years back, Hyundai, a Korean brand entered the Indian market... **Santro** was a signature car... slowly but steadily they captured the Indian market... now, they are among top 3 brands in India...”*

*“Kia is a Korean brand and **sister company of Hyundai**... therefore, it is **trustworthy** and see Seltos...selling like hot cake...”*

*“Kia has created a superb entry in Indian market... it understood the customers’ requirement and therefore, **providing value for money cars**... not heard any negative about Seltos as of now...”*

*“Although Kia has captured the market, however, **after sales service needs to be taken care** as this is the place where Indian customers’ mindset plays a crucial role...”*

Perception on Brand and Country of Origin: Indian /Japanese Brands

- Due to high visibility on the road, Maruti Suzuki and Tata have image of common car

Maruti Suzuki

- The common man's car – mostly for everybody and anyone can afford
- Low maintenance and service centres/spare parts are available everywhere

Tata Motors

- Sturdy by build quality
- A native brand – hence emotion is attached
- Change in design & technology – it can compete with any global brand now

*“Indian brands like **Maruti** and **Tata** are more of **common peoples car**... they are **value for money** and now if you see their pavilions, they have already strengthened their **technology, safety features, built quality**...”*

*“Maruti is such a company that still holds the **maximum share**... what ever your **budget** is, you go to Maruti showroom and you will come back after purchasing a car...”*

*“Maruti is known for its **service centres and spare parts**... you have seen the ad – where ever you go, you are never far from a Maruti service centres...”*

*“**Tata** has also become **Global**... Tata has a collaboration with **JLR**... now, they are coming up with advanced **technology cars with superior design**...”*

Perception on Brand and Country of Origin: Japanese Brands

- Japanese brands such as Toyota and Honda are perceived as high quality and trustworthy brand

Toyota

- Trustworthy
- Superior engine quality
- No maintenance car with high resale value
- A premium Japanese brand

Honda

- A pioneer in design in India
- Good engine quality
- Good body build
- Durable

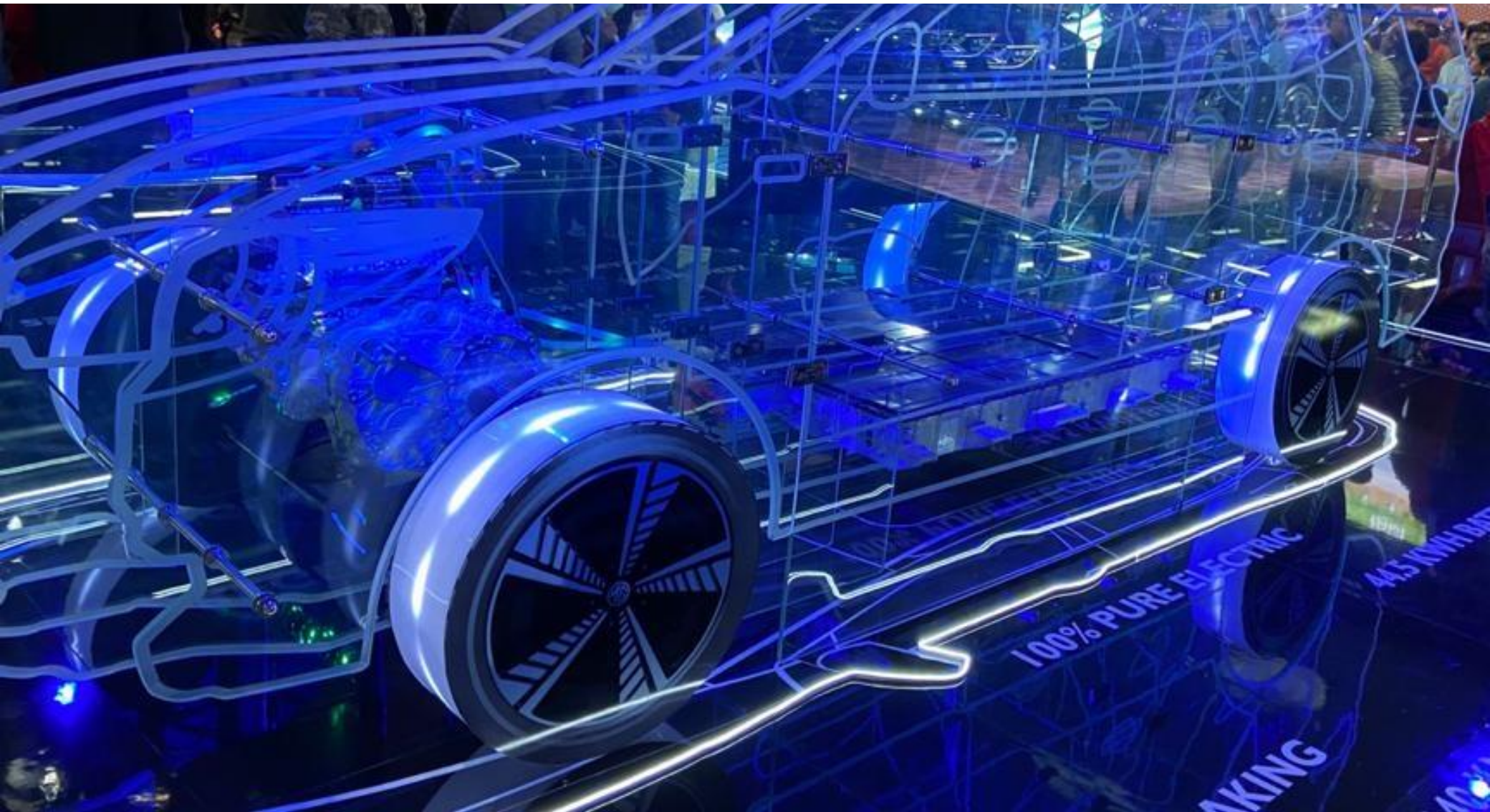
*“Japanese brands like Toyota and Honda are always **trustworthy** and of superior **quality**... Korean brands like Hyundai is offering superior quality... now, they need to be more cautious to compete with the new entrants...”*

*“Toyota is always a **premium** brand for any Indian customer... it is known for its **engine quality** and **low maintenance**...”*

*“Honda City is an **iconic car** in Indian market... Honda is good at **design** and being a Japanese brand, it is superior in **engine quality** as well...”*

*“We see the car, not country of origin. If Chinese OEM offer good value for money car, why we won't go for it? I understand **Japanese cars** are very good quality, **but bit expensive**.”*

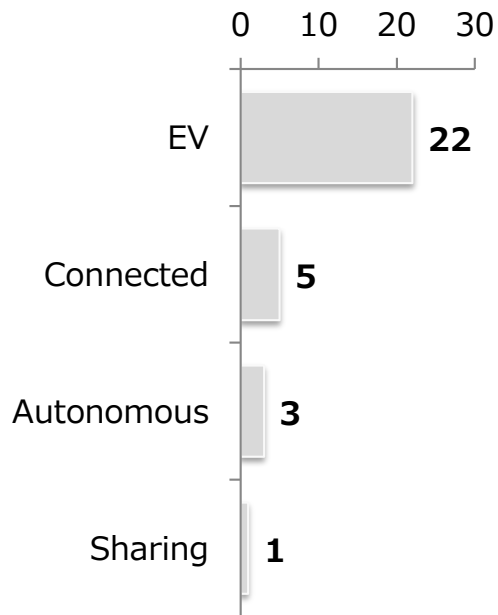
PERCEPTION ON THE NEW TECHNOLOGY



New Technologies focused by OEMs

- Among advanced technologies (Connected, Autonomous, Shared & Services, Electric); OEMs focused on electric but not sharing in this expo

Number of display



* Intage counted number of display among 11 OEM (4-wheelers) on 8th Feb.

EV



Autonomous



Connected



Sharing



Electric Vehicles Showcased in the Expo



MG Marvel X



Mercedes Benz EQC



Hyundai Kona



Kia Soul EV



Tata Nexon EV



Tata Altroz EV



Kia Niro EV



GWM R1



Renault K - ZE



Tata HBX EV



Haima Bird Electric



Mahindra eXUV 300

Perception of Power Train

- Increasing social responsibilities and for pollution free India, OEMs introduced EV's proactively and consumers planning to consider EV as a next solution for industry though infrastructure is a challenge
- Govt. of India is also emphasizing and promoting and INDIA is slowly moving towards adoption of EV
- Consumers are aware of EV and Hybrid, while there is limited awareness of Fuel Cell and PHEV

Barriers

Insufficient Infrastructure

No/Limited Charging Stations

No Charging Option at Home as Staying in Condominium

Initial Cost of the Vehicle

Low Range – Limited Mobility

Low Top Speed – Not Thrilling



- Both organizers (SIAM, ACMA) and various OEMs are focusing on promoting EV this time through the Auto Expo
- Few OEMs are planning to contribute to building up of infrastructure facility as well

Drivers

Govt. Policy and Push for Adoption

Increase in People Knowledge

Demand of Pollution Free City

Willingness to Adopt New Technology

Almost NO maintenance

Much Lower Running Cost

[Knowledge level of new power train]

- Customers are aware about hybrid, but, can't differentiate between mild/micro/complete hybrid
- Fuel Cell technology and PHEV (Plug-in Hybrid Electric Vehicle) have limited/no awareness
- Hyundai Pavilion had a demonstration of Fuel Cell Technology, however, it was hardly noticed by any customer

How EV Perceived by Customer

Barriers

"I don't think that India is ready for electric... you are in metros, still you don't have electricity connection for 24 hours... think about smaller town and rural areas... how they will adopt electric vehicle where there is no electricity..."

"Government initiative is there to promote electric vehicles and companies are also promoting... but, considering Indian scenario, they will give up in next couple of years for sure..."

"Initial cost is the biggest issue... companies should take care of this and put in place more attractive finance options... Government has to increase the subsidy as well..."

"In one of the pavilion the fuel cell technology was displayed, but I don't know much about it... I am not sure any of the Indian car has it or going to have it..."

Drivers

"The way Government is pushing adoption, EV will be future for India..."

"Although infrastructure wise we are not ready to adopt electric vehicle immediately, however, initiatives have began & we often see articles etc. online..."

"OEMs are showcasing the electric vehicles in their pavilion, which is no way less in technology and build quality... it seems that in next few years, we can see the majority of electric cars running in Indian roads..."

"Hybrid car is there... Toyota has hybrid car and now, Maruti is also coming up with hybrid car... but, I think the future is not hybrid, but electric..."

"I have heard that full hybrid cars are even costlier than electric car in the long run, so why one should opt for it... it is better to go for electric as this is environment friendly as well..."

Perception of New Technologies: Connected Features

- Customers don't have significant awareness about connected features – they understand the feature as App based and as a next generation technology
- OEMs are focussing and promoting the connected features at their pavilions. They perceive that connected features will become hygiene factor especially for younger generations.

CUSTOMERS

“The connected features is a App based technology where you can track your car and it is good for your car's safety and security... you can also track the mileage etc. through this App....”

“This feature is also good for geo fencing, where you can track your car and how far it is moving from your home... you can also have control over it...”

“Through App, you can keep track of your vehicle, keep track of maintenance schedule... can control its reach and maximum speed etc... in a way this feature will keep you always connected with your car where ever you are...”

OEMs

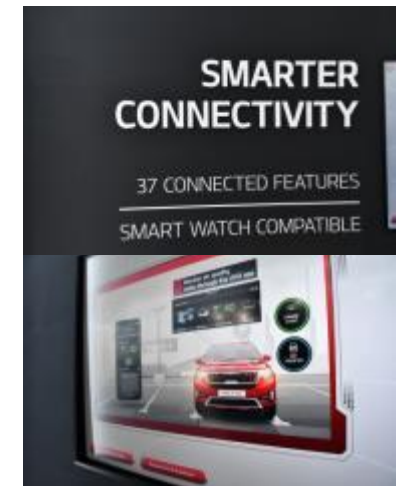
“Customers are now educated enough because all information are available in various media... Peoples increasing Knowledge for Safety, Security, Automation is creating an increasing demand for connected features....”

“Connected feature is a technology for next generation and its is well understood by younger generations... therefore, connected feature is no more a value addition, but a hygiene factor for all automobile manufacturers...”

Hyundai Bluelink



Kia UVO



JK Smart Tire



Perception of New Technologies: Autonomous

- For majority of the customers, India is still not ready and it is far way to go for autonomous driving – majorly due to road and traffic conditions
- OEMs are also feeling the same however, through their concept and featured car – they have started educating the customers that automation is no longer a dream and automatic cars are well equipped with all safety features.

CUSTOMERS

“India is a country where non-automated car driving in such a road condition is challenging, we can’t expect an automated car running in roads....”

“Still safety and security is a key concern and automatic cars will be a failure even after 5 years... India is not at all ready to accept and adopt it in immediate future...”

“We have seen the automatic car in one of the pavilion and many companied are showcasing their automatic car... but, all is happening in controlled environment, but, in reality, it won’t be possible in India...”

OEMs

“We have brought the feature cars with level 2 automation... it is completely tested and we are soon starting the trial in India... we expect that in future we can launch it in India....”

“All the cars are automated as well as you can drive it as well... we have showcased the car to make the customers understand that we are bringing Global technology which can also be used in Indian road condition also...”

“We are also showcasing the next generation mobility – the level 3 autonomous cars... this is still in concept phase and it will be ready for road trial soon...”

GWM – R1



Funster – Mahindra



SYMBIOZ – Renault





2 – WHEELER PLAYERS



2 – Wheeler Players at the Expo

- **EV start-ups introduced new models with longer range and speed as also safety and connected features, whereas Suzuki and Piaggio displayed engine models.**
- **EV 2 – wheelers players are now not restricted to Scooter category (which is mostly utility). Innovations in electric motorcycle category was the key attraction of the Expo**

Hero Electric

- Perceived as the pioneer of EV 2 – wheelers, existing in Indian market for more than 12 years
- Global player and technically superior in EV in India
- Considering customers' preference – coming up with motorcycle and global level technologically superior models with high safety features

EeVe

- An indigenous brand with native origin with eco-friendly approach
- Key focus is to compete with major players with innovative style and design of 2 – wheelers
- Already established their presence in Eastern India with good sales and reach, and now eyeing for a national level presence

Okinawa scooters

- An Indo – Japanese brand – hence, positioning on technology with a wide range of scooters
- Key competition with Hero Electric
- Customer feedback and satisfaction on high priority
- Willing to help to build infrastructure for EV adoption in India

Suzuki Piaggio

- The major 2 – wheeler players participated in the Expo without any EV offerings
- They are still in 'wait and watch mode' for the adoption of EV in India considering the existing infrastructure scenario

Glimpses of the Pavilion of 2-Wheeler players

Hero Electric



Okinawa



Eeve



Suzuki Motorcycles





INTAGE INDIA Pvt. Ltd.

Contact:

✉ info@intageindia.in

☎ +91-11-41810000

🌐 <http://intage-india.com/>

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