



Spotlight on India:

Providing Engineering Solutions for
the Commercial Vehicle Industry

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Why India?

- Engineering, design, services industry
- Favorable governmental systems, regulations
- English language
- Growing economy
- Improvements in Infrastructure
- Large, skilled workforce

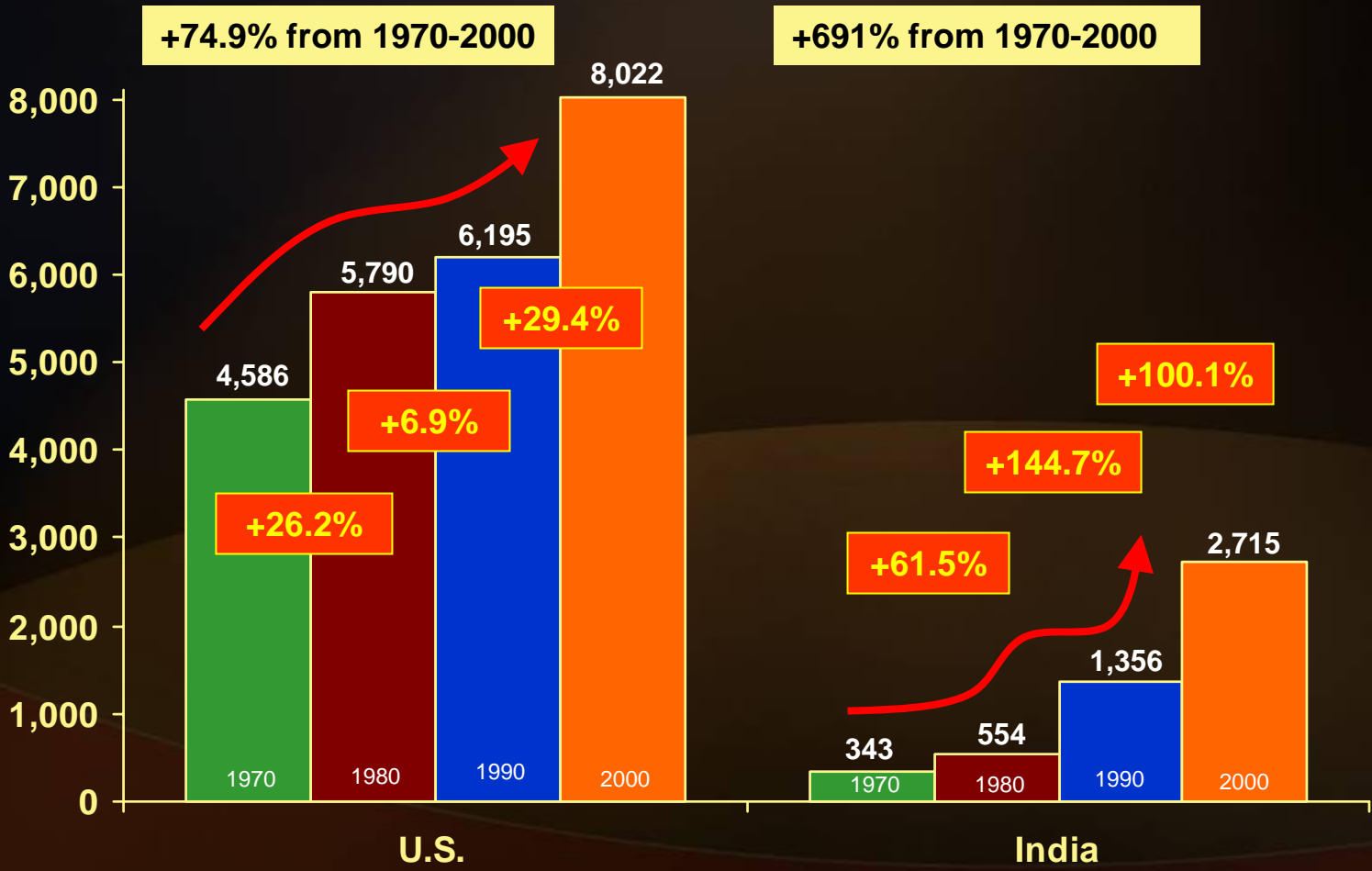




Leveraging Opportunity in India

Commercial Vehicle Industry Trends

(Number of Registered Trucks)

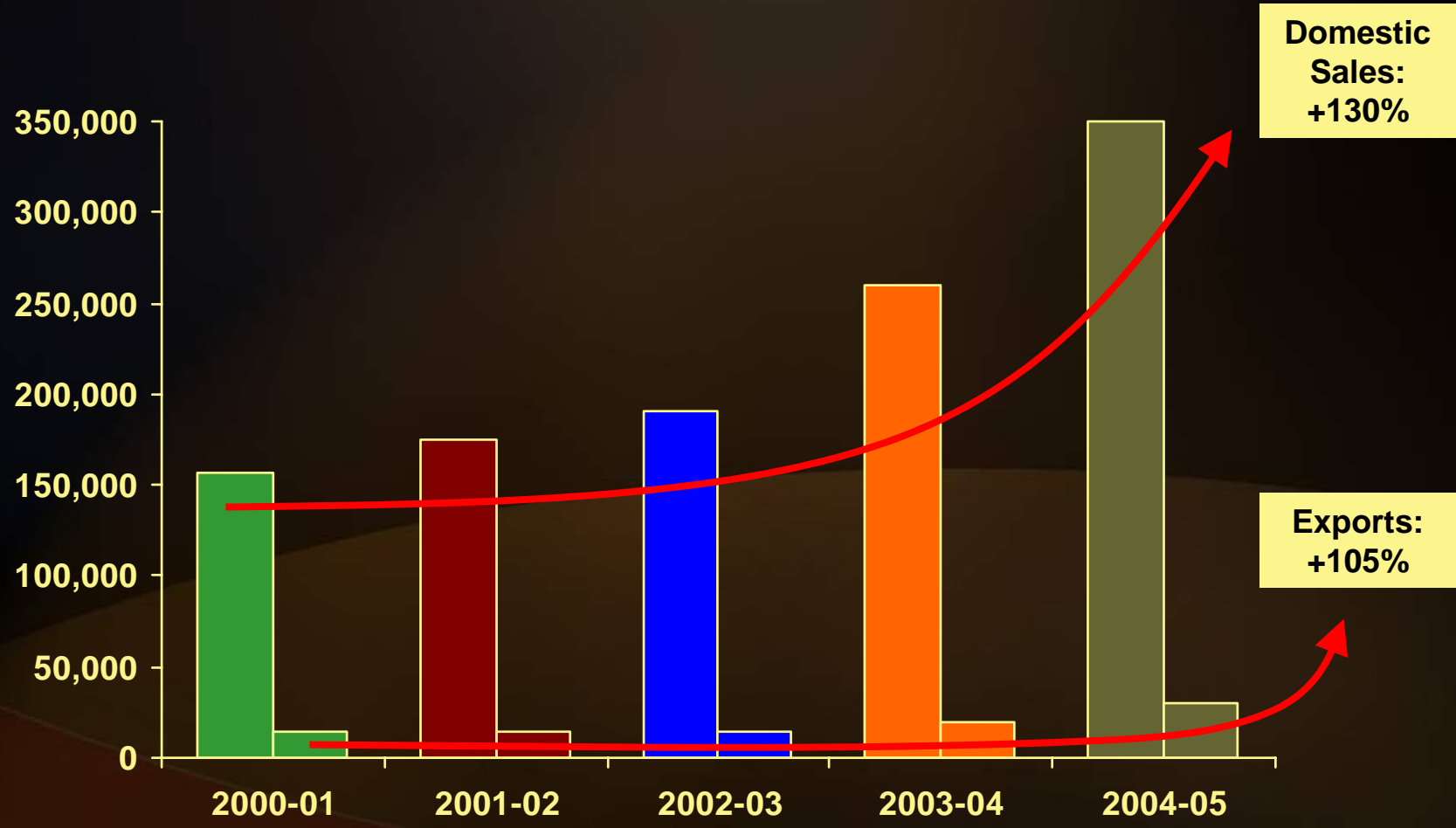




Leveraging Opportunity in India

Commercial Vehicle Industry Trends

(Indian domestic and export sales)





Leveraging India for Global Markets

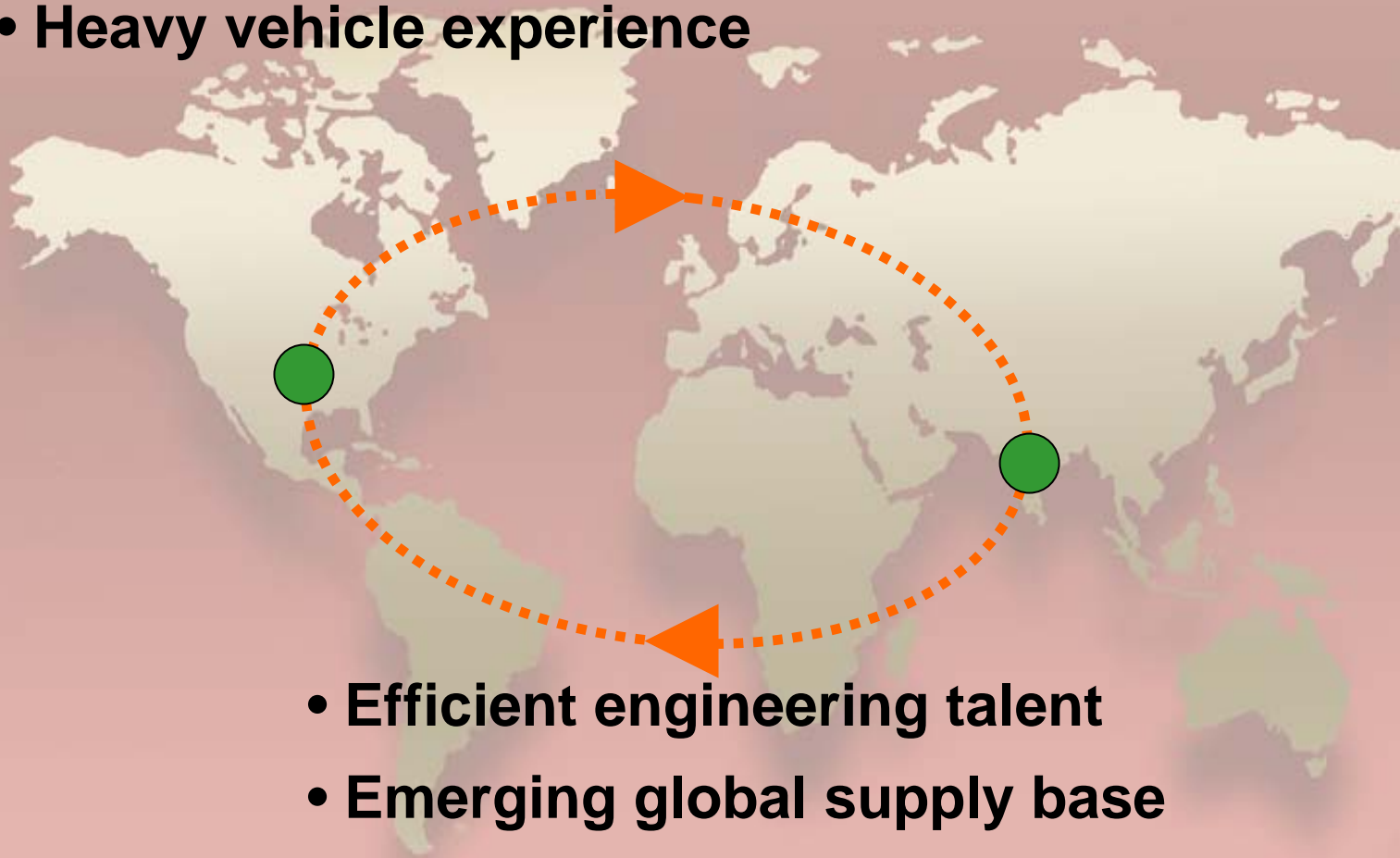
- **Commercial Vehicle Exports**
 - Opportunity to use India as a hub for export markets





A win-win scenario

- Emissions technologies/expertise
- Heavy vehicle experience

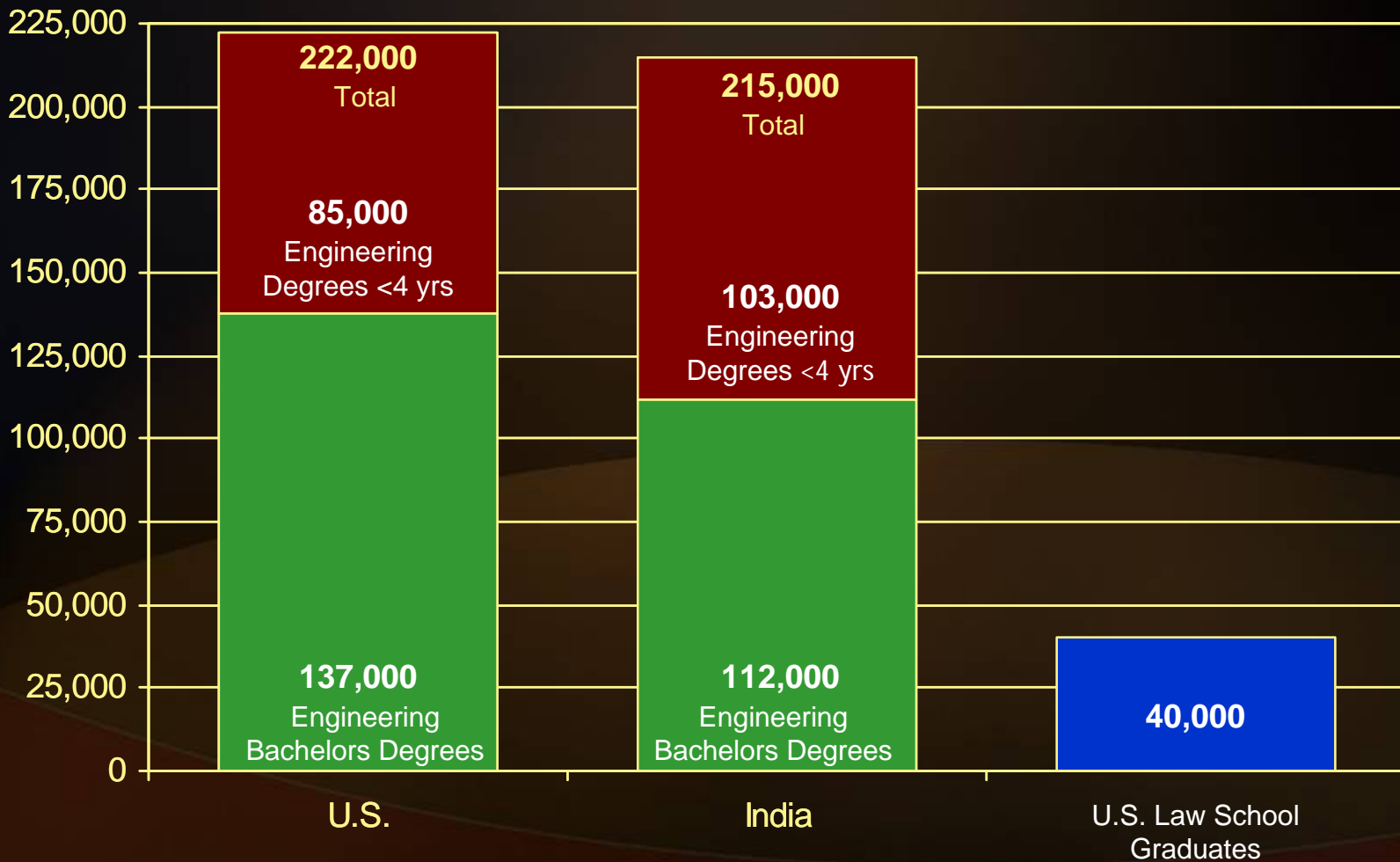


- Efficient engineering talent
- Emerging global supply base
- Expertise in price-sensitive market



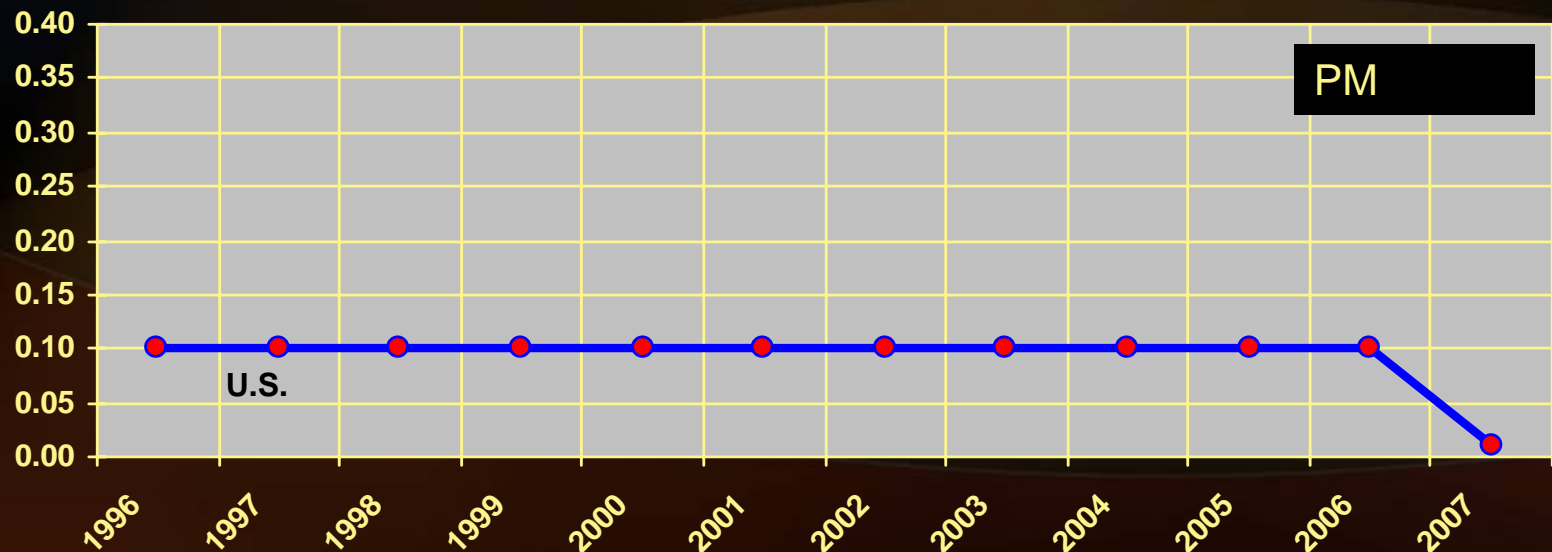
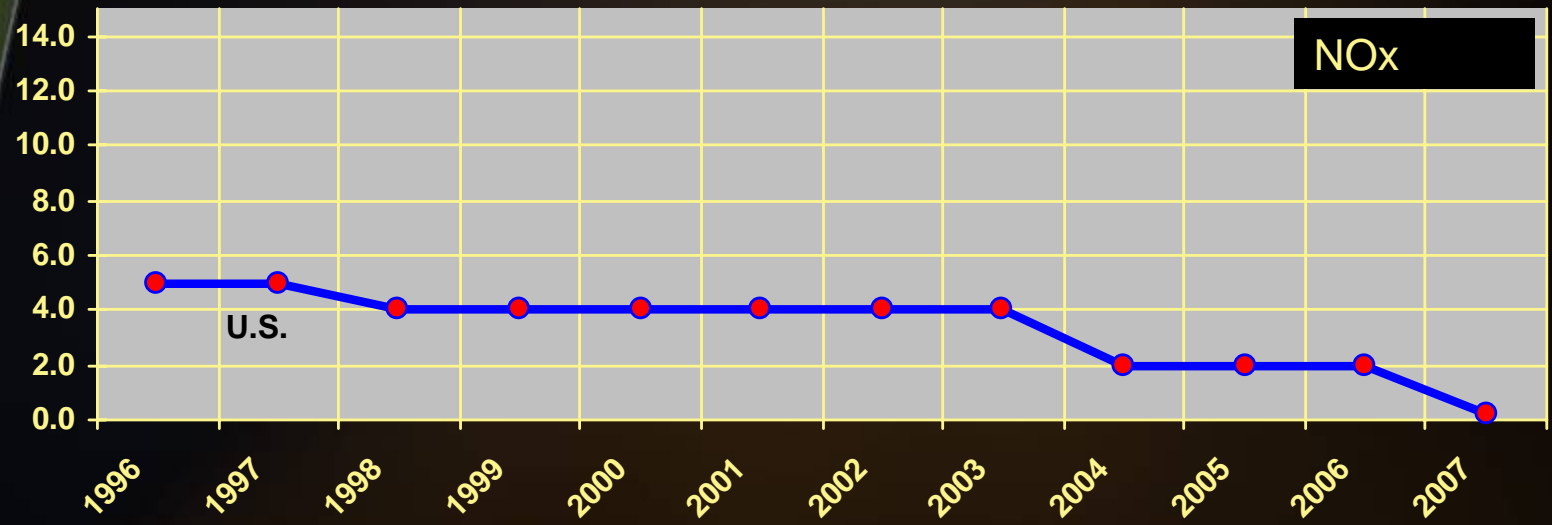
Maximizing Engineering Talent

Annual Engineering Graduates



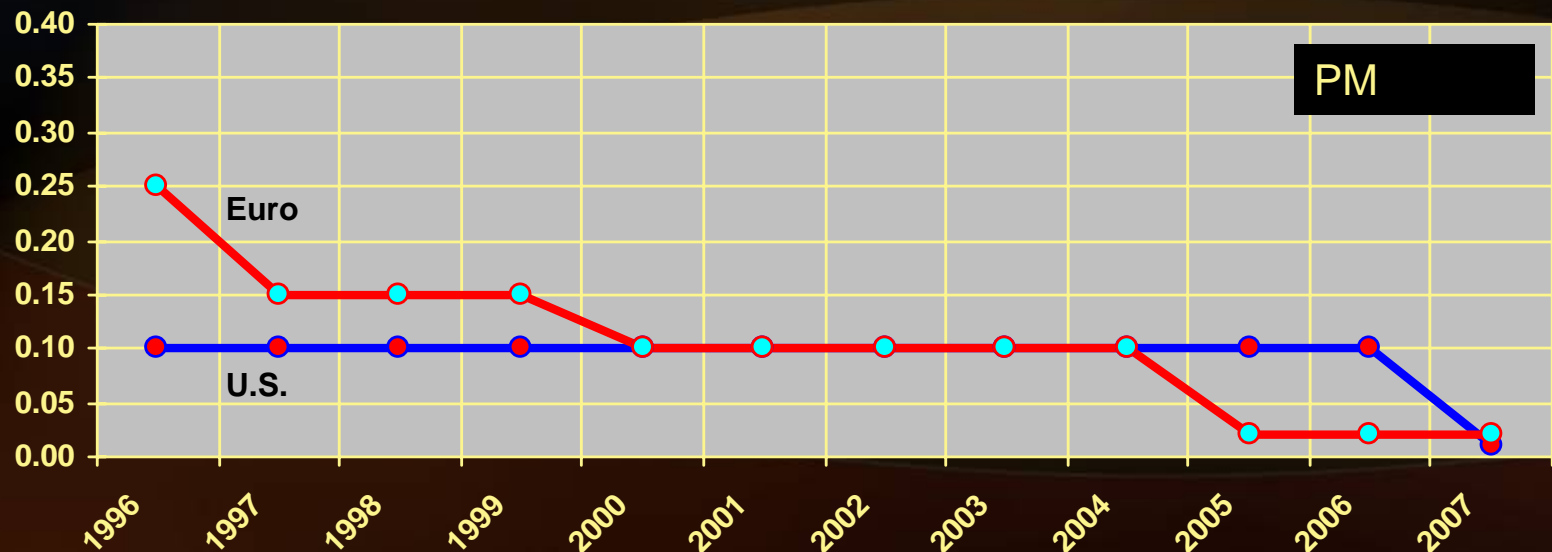


Emissions Regulations



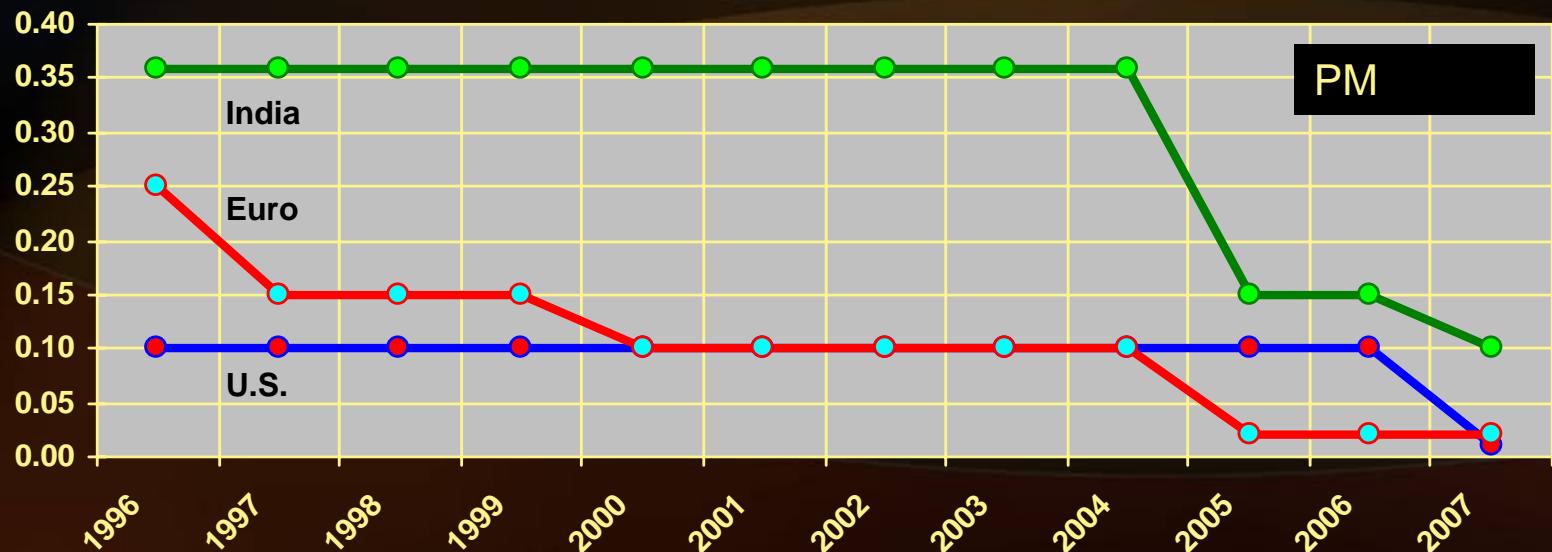


Emissions Regulations





Emissions Regulations

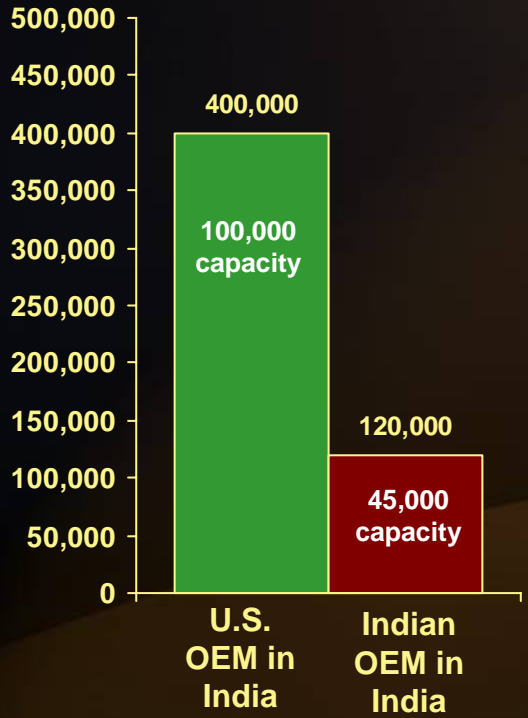




Lean business practices

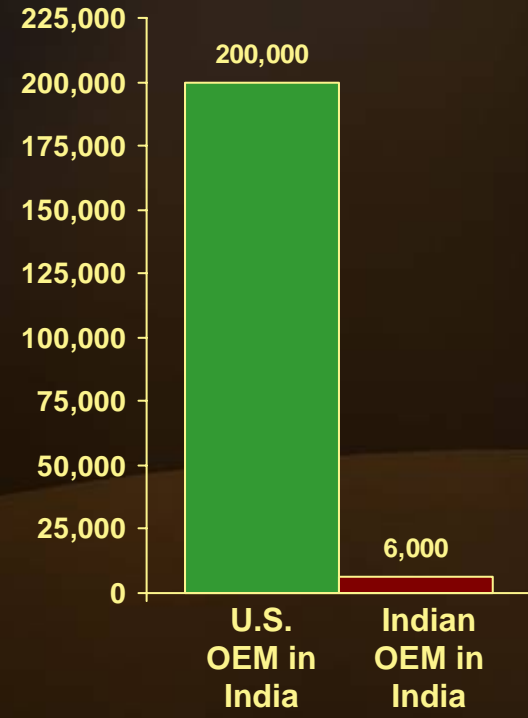
U.S. vs. Indian approaches

(In thousands)

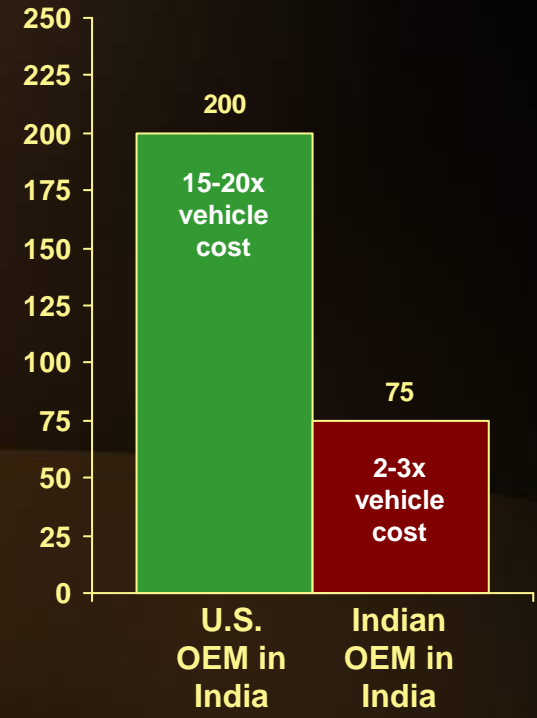


Cost to set up new facility

(In thousands)



Engineering Development Costs



Testing/Prototypes



A win-win scenario

