

# LEADING PLAYER ACROSS TWO VERTICALS





# **FACTS AT A GLANCE**





## SIX DECADES OF BUILDING TRUST



1961

Gabriel India

1962

VGIL<sup>1</sup>/ PCIL<sup>2</sup>

1966

Purolator<sup>3</sup>

1992/1993

· Chang Yun India

· Dana/Spicer

1961 - 1994

1976 SNS Foundation, the CSR arm 1995/1997

· Ansysco

· Henkel · Faurecia

· Behr (now MAHLE)

· Mando (Brakes)

· Valeo Friction

1998 Haldex

2005

MAHLE Filter

1995 - 2005

2003 ANAND Group Supervisory Board 2006

Mando (Suspension)

2007 Takata<sup>4</sup>

2008/2010

· Chang Yun Myutec

· Anchemco

2012

Valeo Service

2013

Mando (Steering)

2019

Joyson Safety Systems

2007

Diversification into luxury hospitality

SUJÁN Sher Bagh

2009

SUJÁN The Serai

2013

SUJÁN JAWAI

2006 - 2021

OTHER MILESTONES

**GROUP** 

**COMPANIES** 

2019

ANAND Group companies are recognised amongst 100 Best Companies in India. Also, featured in Best Workplaces for Women by Great Place to Work®

2021

ANAND Group and Mando Corporation announce the set-up of a new joint venture company called ANAND Mando eMobility

## LEADING THROUGH STRONG GOVERNANCE



Jaisal Singh

Vice Chairman

#### **Deep C Anand Foundation**



Deep C. Anand Chairman & Chief Mentor. DCA Foundation

Trustee



Kiran D. Anand Anjali Singh

Trustee



Jaisal Singh

Trustee



Lorenzo Piaget Rohit Arora Deepak Chopra

Trustee Trustee



Trustee

### **Group Supervisory Board**



**Anjali Singh** 

Executive Chairperson, Group Supervisory Board Executive Chairperson, ANAND & Gabriel India Chairperson, Dana Anand India Member PC & OC Chief Human Resource Officer



Jaisal Singh

Co - Chairman, HL Mando Anand India Chairman, GSGC Chairman, SUJÁN Member PC & FARC



Rohit Arora

Founder & Chairman. Silverskills Member PC & FARC



Lorenzo Piaget

Partner. Piaget & Associés Member FARC



Mahendra K. Goval Manoi Kolhatkar

**Group President &** Co-Chief Operating Officer



**ANAND Executive Board** 

**Anjali Singh** 

Chairperson

Group President & Co-Chief Operating Officer



Jagdish Kumar

Group President & Chief Financial Officer



Sunil Kaul

**Group President &** Chief Technology Officer



S. Sarathi

Group President & Chief Assurance Officer



**Sumit Bhatnagar** 

Group President. Future Mobility



President & CEO. Bharat Light Power Member OC & FARC



Deepak Chopra

Co-Chairman, Joyson ANAND Abhishek Safety Systems Member PC & OC



Jean-Louis Chaussade

Chairman of JLCH Conseil, Paris

## DIRECTING THE FUTURE STRATEGICALLY



## **Vision**

## To Create Value Sustainably Through Pursuit of Excellence and Good Governance















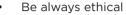


## **ANAND BELIEFS & BUSINESS PHILOSPHY**

**PARTNERSHIPS** 

**QUALITY** 





- Enhance fairness and transparency
- Strengthen CSR activities under SNS Foundation
- Ensure robust strategic planning and execution
- Strengthen governance through Group Supervisory Board
- Build and sustain strategic partnerships
- Exchange best-in-class management practices between partners
- Strengthen "Unified corporate entity"
- Foster a culture of quality
- Deploy world-class quality standards, tools and systems

Be top 3 player in each seament **CORPORATE** CITIZENSHIP &

**PEOPLE** 

**GROWTH** 

- Aim to grow ahead of the market
  - Live by "Business is 90% people"
  - Attract and retain talent
  - Empower people and encourage accountability
  - Develop people for required skills and experience



**GOVERNANCE** 

MANUFACTUR-ING & **TECHNOLOGY** 

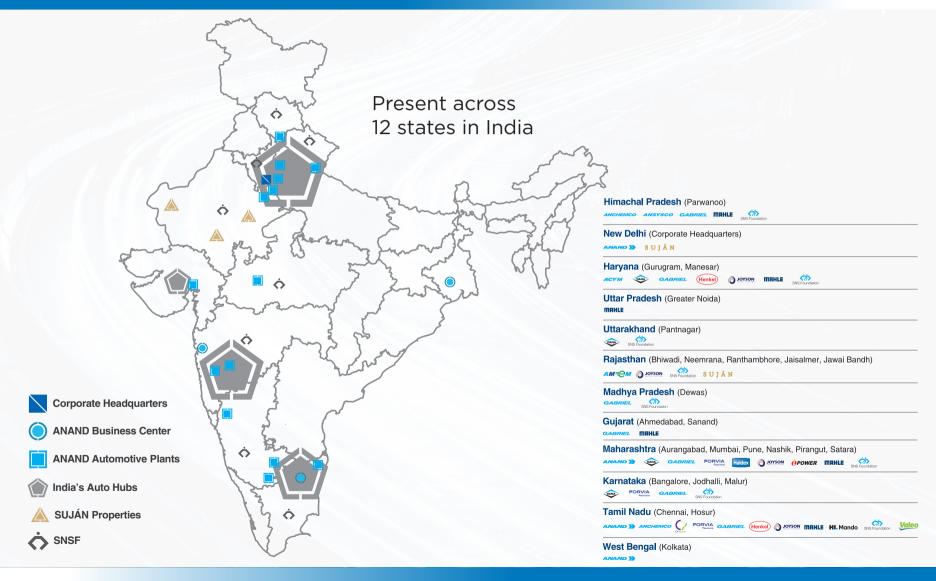
**CUSTOMERS** 

- Become the preferred supplier of our customers Provide value and exceed
- customer expectations
- Nurture strong and enduring customer relationships

- Achieve operational excellence through lean production systems
- Develop supplier base through VSME\* programme
- Aim to spend 2% of sales in R&D
- Develop innovative processes and products to stay competitive

## **BEING CLOSE TO CUSTOMERS**





# laps are not to scale and show approximate locations on

## PARTNERSHIP BASED MODEL





#### **JOINT VENTURE PARTNERS**

CY Myutec, Korea
Dana Incorporated, USA
Elewana Collection, Kenya
Faurecia Clean Mobility, France
Haldex AB, Sweden
Henkel KGaA, Germany
Joyson Safety Systems, USA/China
MAHLE GmbH, Germany
HL Mando Corporation, Korea
Valeo, France

#### **TECHNICAL COLLABORATIONS**

KONI BV, The Netherlands KYB Corporation, Japan Seiken Chemical Industry Company, Japan Sunrise MSI Corporation, Japan Yamaha Motor Hydraulic Systems, Japan

# AUTOMOTIVE PARTNERING WITH GLOBAL LEADERS



| JV PARTNERS      | HEADQUARTERS | REVENUE*             | EMPLOYEES* | BUSINESSES  |
|------------------|--------------|----------------------|------------|---|
| CY Myutec        | Korea        | KRW 108<br>Billion   | 301        | Synchronizer rings for transmission   |
| DANA             | USA          | \$ 8.9<br>Billion    | 40,200     | Drivetrain and E-propulsion systems   |
| Faurecia         | France       | Eur 15.6<br>Billion  | 1,11,140   | Seating, Interiors, Clean Mobility & Clarion Electronics  |
| Haldex           | Sweden       | SEK 4.01<br>Billion  | 1,990      | Brake and air suspension systems for heavy vehicles   |
| Henkel           | Germany      | Eur 20.1<br>Billion  | 52,700     | Adhesive Technologies, Beauty Care and Laundry & Home Care  |
| Ningbo<br>Joyson | China        | CNY 47.9<br>Billion  | 50,000     | Auto Electronics, Auto Safety, E-Mobility, Auto component   |
| MAHLE            | Germany      | Eur 9.8<br>Billion   | 72,184     | Engine Systems & Components, Filtration & Engine Peripherals, Thermal Management and Electronics & Mechatronics |
| HL Mando         | Korea        | KRW 6,147<br>Billion | 13,197     | Brake System, Steering System, Suspension<br>System, Driver Assistance System & Electronics                     |
| Valeo            | France       | Eur 17.3<br>Billion  | 1,03,300   | Driving Assistance Systems, Powertrain Systems,<br>Thermal Systems and Visibility Systems                       |

# **AUTOMOTIVE CUSTOMER PRESENCE**



50+ OEM Customers across Two Wheelers, Three Wheelers, Passenger Cars, Commercial Vehicles Railway Segments and Engine Components





















































































































- Chassis
- Safety

#### **GABRIEL**

**GABRIEL INDIA** 

TC: KYB CORPORATION, JAPAN; YAMAHA MOTOR HYDRAULIC SYSTEMS, JAPAN; KONI BV, THE NETHERLANDS

SHOCK ABSORBERS, STRUTS, FRONT FORKS, GAS SPRINGS, COOLANTS & BUSHKITS





JOYSON ANAND ABHISHEK SAFETY SYSTEMS (JAAI)

JV: JOYSON SAFETY SYSTEMS, USA

SEAT BELTS, AIRBAGS & STEERING WHEELS



#### HENKEL ANAND INDIA

JV: HENKEL KGaA, GERMANY TC: SUNRISE MSI CORPORATION, JAPAN

SEALANTS, ADHESIVES, COATINGS, SEALING TAPES, STIFFNER PADS & NVH PRODUCTS



#### ANAND >>

MULTI-MATERIAL COMPOSITES IN PARTNERSHIP WITH FAR COMPOSITES, UK

LIGHT WEIGHT SOLUTIONS IN
MULTI MATERIAL COMPOSITES
WITH CARBON/GLASS FIBER
FOR STRUCTURAL/ FUNCTIONAL
PARTS IN CHASSIS/ POWERTRAIN/
DRIVETRAIN



HALDEX INDIA

JV: HALDEX, SWEDEN

SELF-SETTING AUTOMATIC BRAKE ADJUSTERS, MANUAL SLACK ADJUSTERS, CONDENSOR-CUM-SEPARATOR, ABS, EBS, DISC BRAKES & OTHER AIR BRAKE PRODUCTS

## **HJ** Mando

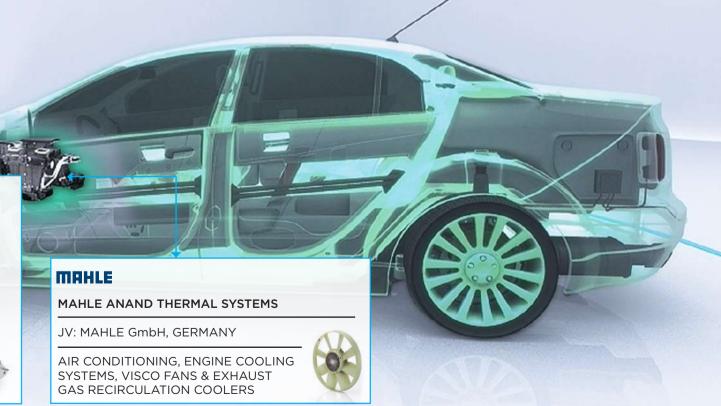
HL MANDO ANAND INDIA

JV: HL MANDO CORPORATION, KOREA

ELECTRIC PARKING BRAKE, ELECTONIC STABILITY CONTROL, INTEGRATED DYNAMIC BRAKE, BRAKE CALIPER, MASTER BOOSTER, DRUM BRAKES, COLOMN ELECTRIC POWER STREERING, RACK ELECTRIC POWER STREERING, SHOCK ABSORBERS AND STRUTS



- Emission Control
- Thermal Management



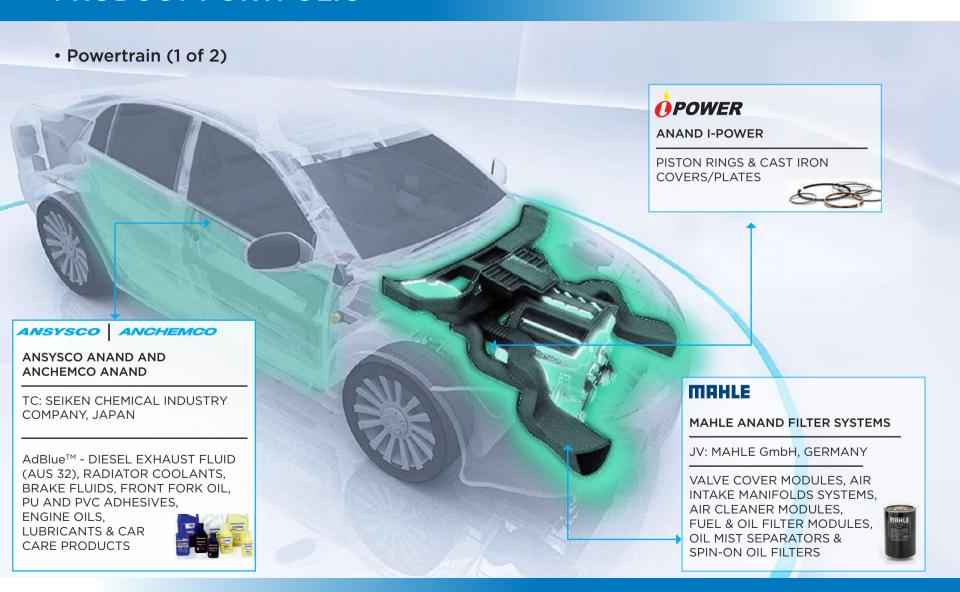
#### FORVIA faurecia

**FAURECIA CLEAN MOBILITY** 

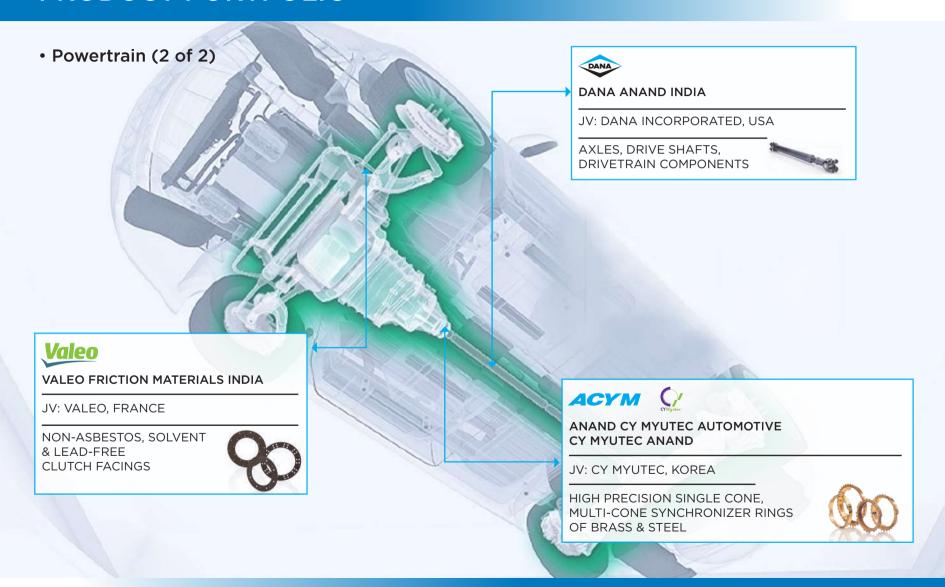
JV: FAURECIA CLEAN MOBILITY, FRANCE

EXHAUST MUFFLER ASSEMBLIES, CATALYTIC CONVERTERS, INSTRUMENT PANEL REINFORCEMENT ASSEMBLIES (IPRT) & DOOR SIDE IMPACT BEAMS (SIB)

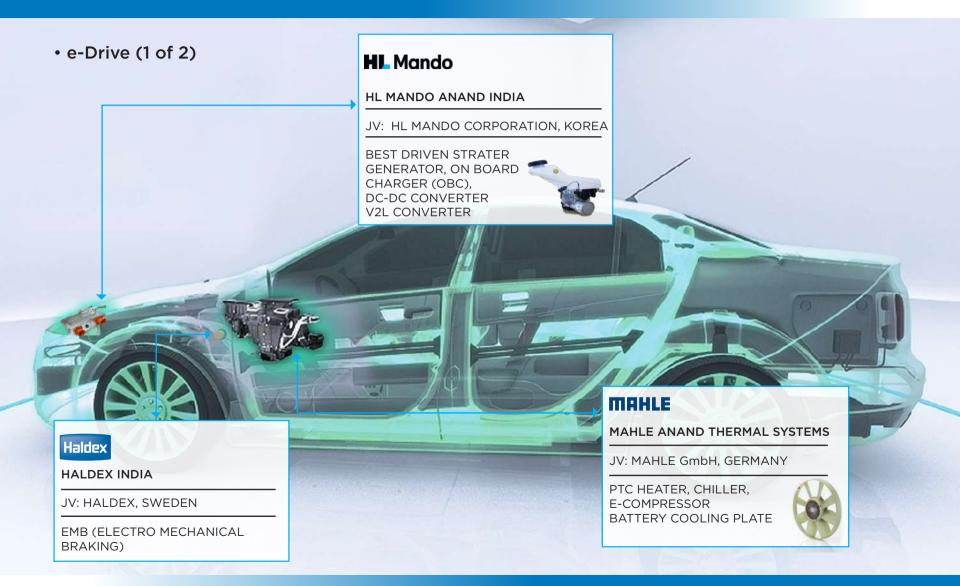




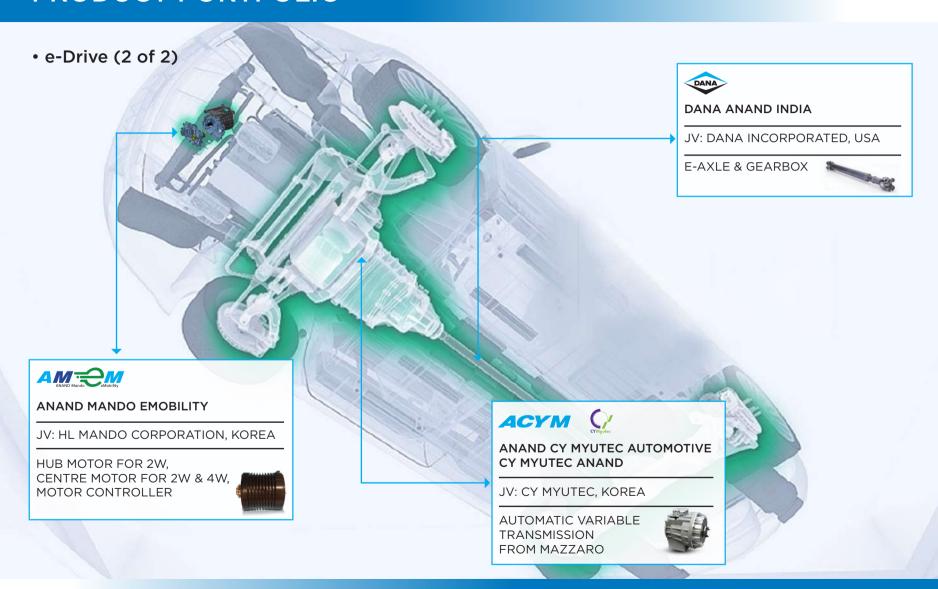












# AUTOMOTIVE GABRIEL INDIA, THE FLAGSHIP COMPANY



- Established in 1961, it is a publicly listed company
- Total Revenue of INR 23320 Million & Profit Before Tax at INR 1265 Million during 2021-22
- Market leader for pioneering Ride Control Products in India
- 7 manufacturing plants and 3 satellite facilities with products ranging from Shock Absorbers, Struts, Front Forks, Seat Dampers, Cabin Dampers
- ➤ Amongst the Top 10 suspension players globally
- Strong R&D with over 75 patents filed till date in products and processes
- Gabriel India, made it to the top of Fortune India -The Next 500 companies list for the year 2021 in the mid-size category





# SUJÁN CAMPS PROPERTIES & EXPERIENCES



#### TRANSFORMATIVE AND EXPERIENTIAL TRAVEL

# SUJÁN

















# SUJÁN GLOBAL RECOGNITIONS



SUJÁN has established itself on the global high-end luxury tourism scene and has won prestigious accolades.





#### **ACCOLADES**

- Condé Nast Traveller The Best Family Hotels In The World 2022
- Travel & Leisure SEA Editors Choice 2020
- Condé Nast Traveller Readers' Choice Awards for 2020
- The Vanity Fair, Travel Award 2020
- Condé Nast Traveller Gold list 2020
- Runner-up, Favourite Safari Lodge & Favourite Boutique Hotel in India by Condé Nast Traveller Readers' Travel Awards 2019
- Travel + Leisure India & South Asia India's Best Awards, 2018

## **ANAND GROUP CORPORATE**





BUSINESS DEVELOPMENT



**AFTERMARKET** 



**HUMAN RESOURCES** 



TECHNOLOGY & INNOVATION



GROUP COMMUNICATIONS



CORPORATE SOCIAL RESPONSIBILITY



MANAGEMENT & GOVERNANCE



GROUP STRATEGY



INTERNAL AUDIT, FINANCE, TAX & LEGAL



INFORMATION TECHNOLOGY



ANAND U (EXCELLENCE IN MANUFACTURING), CORPORATE MATERIALS

## **BUSINESS DEVELOPMENT**



## >> Customer Relationships

- Leveraging automotive industry network built across five decades
- Holding Customer Technology Days
- Conducting customer satisfaction surveys

## Business Intelligence

- Market intelligence & analysis Market. Regulatory, Customers, Competitors
- Identifying new business opportunities

## >> Voice in the Industry

- Membership and representation in industry associations (ACMA, CII, SIAM, etc.)\*
- Visibility in industry publications and presence in trade shows and exhibitions





















# BUSINESS DEVELOPMENT CONNECTING WITH KEY CUSTOMERS



**Technology Days** and **Auto Expo** are an integral part of customer connect and branding for ANAND Group companies.











# BUSINESS DEVELOPMENT STRONG RELATIONSHIPS



#### >> Mrs. Anjali Singh

## Executive Chairperson, ANAND & Gabriel India Chairperson, Dana Anand India

- Executive Committee Member, ACMA
- Chairperson, Pillar 4 Strategic Partnerships, ACMA
- Member, Western Region Committee, ACMA
- Vice Chairperson, CII Haryana State Council
- Member, Confederation of Indian Industry (CII) International Council
- Member, Governing Body of CII Champions for Societal Manufacturing (CSM) Initiative
- Member, CII Northern Regional Council
- Member, India-Japan Business Leaders Forum (IJBLF)
- Member, Tata Motors Supplier Council

#### >> Mr. Jaisal Singh

Director, Group Supervisory Board Vice Chairman, ANAND Executive Board Co-Chairman, HL Mando Anand India Chairman, SUJÁN

- Vice-President and Member of the Executive Committee & Board of Directors, Relais and Châteaux
- Chairman, CII Northern Region Committee on Tourism & Hospitality
- Member, CII National Committee on Tourism & Hospitality

#### >> Mr. Manoj Kolhatkar

Managing Director, Gabriel India
Group Co-Chief Operating Officer, ANAND
Group President, Business development & Corporate Materials, ANAND

- Executive Committee Member, Western Region Committee, ACMA
- Member. Pillar -1. Sub Pillar-OEM Business Development Executive Committee, ACMA
- Chairman, Pillar-3, Sub Pillar- HR & IR, ACMA
- Member, Governing Council, Automotive Skills Development Council
- Member, Japan Country Committee, CII
- Executive Committee Member, Maruti Suzuki Suppliers Welfare Association (MSSWA)

#### >> Mr. Rajeev Gera

Member, ANAND Management Forum and President & Head Business Development and Corporate Materials, ANAND

- Member, Northern Region Committee, ACMA
- Member, Pillar 1 Business Development, ACMA
- Executive Committee Member, Honda Cars India Suppliers Club







# BUSINESS DEVELOPMENT GARNERING CUSTOMER APPRECIATION







HL Mando Anand India received 'Mahindra Supplier Excellence Award' in 2 categories from Mahindra at their Supplier Meet



ANAND Group, received the prestigious Going Extra Mile Award at the Tata Motors 2022



Gabriel India was honoured by Honda Motorcycle & Scooter India at their Annual Supplier conference 2021



HL Mando Anand India received the Best Performance Award in the Occupational, Health, and Safety (OSH) and Sustainability (ESG)



Anchemco ANAND LLP received the Long-Term Association Award at the BOSCH Supplier Conference



MAHLE ANAND Thermal Systems received the Best Performance in Business Alignment – Gold Award from Ashok Levland



Gabriel India received the Periodic Cost Reduction Award from Suzuki Motor India Pvt Ltd



Dana Anand India receives 'Silver Award' from Ashok Leyland

# HUMAN RESOURCES NURTURING AND GROOMING OF TALENT



OE Model - Pioneered the "Operating Engineer" Model, which has enabled ANAND locations being manned by educated work force and being union-free

- OE Model Pioneered the "Operating Engineer" Model, which has enabled ANAND locations being union free and also managed by educated workforce
- >> Developing Leadership from within Most of ANAND's senior management today has grown within the Group
  - At ANAND, every leader is provided with the right platform to exhibit their true capabilities. Potential leaders across levels are groomed through the ANAND Leadership Development Programmes (ALDP) to become effective business leaders
  - Talent management programmes are supported through mandatory mentoring and coaching programmes



- World of Opportunities ANAND people are sent overseas for training to JV partner locations and renowned universites like Oxford University
- Career Mobility Cross-fertilisation of skills and growth opportunities across ANAND companies and JV Partners
- Hiring Talent We hire talent from premium institutes

# HUMAN RESOURCES EMPOWERING A DIVERSE WORKFORCE



## Employing women on the shop floor

- ANAND strongly believes in the empowerment of women
- >> We are an equal opportunity employer
- Some locations have up to 95% women on the shop floor
- Accommodation facilities and amenities provided to encourage women to seek employment

## Widespread reach and diverse workforce

- With presence in 60 locations across India, ANAND employs talent from diverse backgrounds and geographies
- It is this diversity that supports our basic ethos of inclusive growth, reflected across management levels



# HUMAN RESOURCES DEVELOPING RESOURCES THROUGH ANAND U



- 'ANAND U' is the ANAND Corporate University that meets the HR development needs of group companies
- ANAND U has been contributing towards people development since 1991
- ANAND U offers training support and guidance through three academies
  - Leadership Academy
  - Operational Excellence Academy
  - Development Academy
- It is focused on four major areas of people development: Operational Excellence, Talent Development, Technical Interventions and Development of Operating Engineers
- >> Training modules
  - Classroom for face to face learning
  - E-learning
  - Engaging with internal and external faculty

"BUSINESS IS 90% PEOPLE"

MR. DEEP C. ANAND





# PURSUING EXCELLENCE IN MANUFACTURING AND SERVICES



- Visionary Leaders For Manufacturing (VLFM) VLFM programme was started by CII in partnership with Japan International Co-operation Agency (JICA). Through VLFM, ANAND Senior Managers are given unique leadership perspectives. (Around 100 managers trained in VLFM since 2007)
- Visionary Small And Medium Enterprises (VSME) VSME is a programme under the VLFM umbrella, focused on Tier 1 and Tier 2 suppliers. It aims to achieve a win-win relationship between customers and suppliers and also to improve manufacturing (quality, cost, delivery) of suppliers. (Dedicated teams of ANAND engineers has helped around 500 suppliers since 2009)
- ANAND House of Quality (AHQ) Groupwide initiative to improve quality in all that we do
- **ANAND Heijunka Production System (AHPS)** Moving plants from traditional manufacturing to world class practices
- >> Specialised Training for Operating Engineers (STOE) 15 %

  OEs trained through various technical training programmes to specialize in areas of interest e.g. maintenance
- Safety of all employees is of paramount importance across all group companies







# CORPORATE SOCIAL RESPONSIBILITY HAVING AN IMPACT IN COMMUNITIES NEAR-BY



SNS Foundation (SNSF), the CSR arm of the ANAND Group was founded in April 1976.



#### **EDUCATION**

- Engaged with 100+ partner schools in eight states
- Impacted 2.00 lakh school students with inputs of better teaching and infrastructure
- 300+ scholarships awarded to females for 3 year diploma engineering
- 150+ government school students secured state scholarships through SNSF organised coaching

#### SKILL DEVELOPMENT

- Trainings on offer aligned with 11 Sector Skill Councils of NSDC
- 40000+ trained youth (70% females)
- Employability of persons with speech and hearing impairment a key focus
- 70% placement success rate
- 600+ individuals groomed as entrepreneurs





#### **HEALTH & HYGIENE**

- Implementation partner for National Health Mission initiatives
- Key areas HIV/AIDS, Reproductive & Child Health and Industrial Health
- Mobile medical services a key approach for reaching the unreached since 2000s
- Addressed health needs of 7.5 lakh underserved rural population

#### **COMMUNITY CONSERVATION**

- Key areas Promotion of: Micro-credit and Micro-Enterprises, Public green spaces, Conservation of Water and Wildlife
- Facilitated ₹140 MINR micro credit for 1000+ self-help groups
- At Rajasthan:
  - > 100 sq.km. of wilderness protected
  - 3261 households benefit from sanitation services
  - Healthcare for 98K+ livestock
  - 60 individual leopards identified between 2013-20



# MANAGEMENT & GOVERNANCE PURSUING ORGANISATIONAL TRANSPARENCY



- **Ethics -** Ethics forms a very important component of ANAND Group's belief and its practices. Employees, suppliers and vendors are encouraged and guided to maintain the highest level of ethical practices
  - Group Ethics Committee
  - Anonymous hot line facility through Integrity Matters
- Inclusive work environment Ensuring a safe, diverse, and supportive workplace for all employees. Any inappropriate behaviour is taken very seriously by a group-level internal committee, which is responsible for educating employees and evaluating any complaints fairly, comprehensively and in a timebound manner
- 360 Degree Feedback ANAND is well known for its practice of transparency and formal feedback. It was one of the first companies to establish 360-degree feedback across all levels
- Open Discussions We encourage open discussions and dialogue as the main means to sort out differences and improve functioning



## LIVING THE "ANAND WAY"





We Drive ANAND as a UNIFIED CORPORATE ENTITY

We ASPIRE to be a WORLD-CLASS organisation

We ENCOURAGE organisational transparency

We Value INTEGRITY

We Encourage INNOVATION

We Nurture TALENT

We Support continuous EDUCATION

We Build TRUST and EMPOWER PEOPLE

We PRACTICE open and HONEST COMMUNICATION

We RECOGNISE and reward ACHIEVEMENT

We Are an EQUAL opportunity employer

We Are committed to SOCIAL RESPONSIBILITY

