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■ **India's Infra Push To Boost Demand for Galvanized Steel Products (Part Two)**

■ **The Impact of China's Real Estate Crisis on Global Copper and Aluminium Markets**



Aluminium Casting Industry Demands Fair Raw Material Pricing

Mehul Shah
Managing Director,
SUPERKINO EQP Pvt. Ltd



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D. A. Chandekar Editor

Dear Readers,

Recently, I happened to visit a foundry exhibition in India. It was not in a metro city like Mumbai, Pune or Kolkata and thus I was thinking not many exhibitors would be there. To my utmost surprise, there were more than 250 exhibitors including the biggest business houses operating in the foundry sector. 'Oh these organizers must be smart enough to gather such a huge number of exhibitors but what about the visitors' ? Its not very easy to attract visitors to an exhibition. Most of the exhibitions flop not because of fewer exhibitors but due to an absolute dearth of visitors.

I reached the venue purposely on the second day. The first day of any exhibition is busy in the inauguration and other formalities. Also few stands are still doing the finishing touches and are not fully ready to welcome the visitors. Second day is supposed to be the busiest day of the event. I reached there at around 9.30 am and there were hardly any visitors but as the clock passed 10, the visitors started flowing in and the flow did not stop till the evening. It was amazing. 'What about the quality of visitors ?' A question came to my mind. Many super smart organizers invite engineering students to visit the exhibition. It surely adds to the number and the venue looks flooded with visitors but this is of no use to the exhibitors. The students gain knowledge and the exhibitors lose time, resources and money. 'Sir, the visitors are of very high quality. We have received many genuine enquiries and have even cracked three big

Editorial Desk



deals.' One of the exhibitors cleared my doubt. 'Then this event must be a real success otherwise who will come to this odd place every year ?' I said to myself. Actually this was only the second year of this exhibition but it had really attracted exhibitors as well as the visitors.

'We worked sincerely sir and explained everything to the exhibitors. No hidden costs. Everything transparent. Our biggest team is not for marketing exhibitors but for attracting quality visitors. Most of the organizers make this mistake.' One of the organizers was known to me and was explaining his thought line. 'Also we are very fortunate. For the last two or three years, the foundry industry is growing. This gave a good support to our show.' He was quite honest to confess this.

Yes, the foundry sector is doing well for the last few years. I see many casting units going for capacity expansion as well as the product diversification. 'But the exports are not rising. Europe seems stagnated. Where is the growth coming from ? I asked to one of the big casting producer and exporter. 'Sir, today our emphasis is on Indian market. I know the global situation is not very good and many countries are facing recession but the situation in India is quite ok and we are doing capacity expansion banking on India's growth projections.' Journalists have a bad habit of finding negative in everything. 'But what if India's growth slows down ? What will happen to your enhanced capacity ?' I asked him. 'Sir, along with capacity expansion, we are investing a lot in smart manufacturing or Industry 4.0 as it is known. It is giving us very good results in terms of increased productivity and efficiency. We will soon be very competitive in the global marketplace.' The gentleman looked very confident. 'He is the entrepreneur of New India.' I said to myself.

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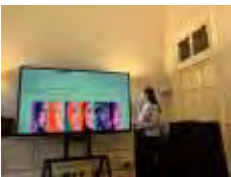
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Aluminium Casting Industry Demands Fair Raw Material Pricing

Mehul Shah

Managing Director, SUPERKINO EQP Pvt. Ltd



Mehul Shah holds degrees in Mechanical and Metallurgical Engineering, completed in 1983 and 1984, respectively. He began his career in 1984 as a Machine Shop Floor Supervisor at SUPER MECH Engineers, where he played a pivotal role in developing a wide range of ferrous and non-ferrous casting components, with individual weights ranging from 0.5 kg to 1100 kg, for various OEMs in the machine tool industry. In 1989, when SGI relocated its foundry to Umergaon, Mehul was a key figure in the planning and execution of the entire project. Following the passing of Sitaram Shah in 2001, he assumed the role of Director at SUPERKINO EQP Pvt. Ltd. To further hone his leadership skills, Mehul completed a management program specifically tailored for family-owned businesses at NMIMS, Mumbai, in 2006. In 2008, when the company moved its entire manufacturing operations to a new plant in Umergaon, Mehul again led the project planning and execution efforts. Today, as the Managing Director of SUPERKINO EQP Pvt. Ltd., he serves as the primary interface with customers, driving the creation of new markets and products. His focus remains on exploring new opportunities and leading the company to greater heights in the years to come.

D A Chandekar, Editor & CEO of Metalworld magazine had an exclusive interaction with Mehul Shah to understand more about the 50 years journey of Superkino, the initial struggle, early products, expectations from the policy makers.

Please tell us about the 50 years journey for Superkino, the initial struggle, early products etc.

Superkino's 50-year journey is a remarkable story of perseverance, innovation, and family legacy. It all began in Gujarat, a land known for nurturing some of the world's most renowned business tycoons, including Dhirubhai Ambani and Gautam Adani. From this fertile ground, two brothers were born in the early 20th century: one in 1921 and the other in 1929, in the quaint village of Sardhav in Gandhi Nagar district, approximately 16 kilometers from the present-day Gandhinagar. Today, Superkino celebrates its

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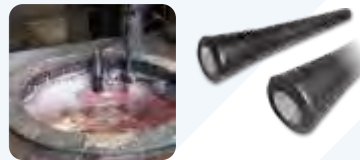
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Face to Face

golden anniversary, marking five decades of success, innovation, and unwavering dedication. The story of Superkino begins with Sri Kanti Bhai and Sri Sitaram Bhai, the fathers of Chandrakanth Bhai and Rajesh Bhai, and Mehul Shah, respectively. These pioneers, alongside their families, laid the foundation

In 1969, Jayant Somchand Shah, the father of Nirmal and Tapan and also Sri Sitaram Bhai's brother-in-law, joined the company as a partner. This marked the beginning of a significant collaboration. The next generation of the Shah family became involved in the business as well: Chandrakanth Shah and

and Tapan Shah joined the team in 2001. The most recent addition to the family business is Manan Shah, the son of Mehul Shah, who joined in 2020 after completing his undergraduate degree in mechanical engineering from Mumbai University and a postgraduate degree in metallurgy and metal forming from Germany's Duisburg



of what would become a successful enterprise. They embarked on their business journey in 1964, a time when startup support systems and seed funding were virtually non-existent. Instead, they relied on a loan of ₹15,000 from Sri Kantilal Kacharalal Shah, a fellow villager and community member who wished them success in their venture.

Rajesh Shah joined the company in 1974 .

Mehul Shah joined the family business in 1982, initially as a part-timer and later as a full-time member from 1984 after completing his degrees in mechanical and metallurgical engineering, respectively. Nirmal Shah came on board in 1990 after finishing his electrical engineering degree,

University.

The company's origins trace back to July 1, 1964, when Kanti Bhai Hiralal Shah and Sitaram Hiralal Shah co-founded Supercast Founders & Engineers in Goregaon, a suburb of Mumbai. Their vision, combined with the collective effort of their descendants and partners, has propelled Superkino into a legacy of excellence and innovation. As Superkino



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celebrates its 50th anniversary, it stands as a testament to the hard work, dedication, and singular focus of its founders and their successors, reflecting a proud tradition of entrepreneurship and family commitment.

Today, what are the products of Superkino ? How much is the export component and in which countries your products are being exported ?

We proudly export approximately 15-20% of our products to key markets in North America, Europe, and the Middle East. Our core expertise lies in delivering customer-specific, high-precision, and high-value aluminum castings. We specialize in producing castings for various Industries such as

- Power sector
- Electrical Equipment for Hazardous Area
- Transportation
- General Engineering.
- Aerospace

Besides casting we also manufacture below products.

- Transformer accessories
- Underwater & Special Lighting systems for nuclear power plants

Foundry Capabilities

Equipped with state-of-the-art infrastructure, our foundry can manufacture near-net-shaped aluminum castings ranging from 0.5kg to 400kg. We offer in-house facilities for various casting processes, including Sand Casting, Gravity Die Casting

(GDC), and Low-Pressure Die Casting (LPDC).

Heat Treatment and Surface Treatment

Our in-house infrastructure supports the heat treatment and shot blasting of castings weighing up to 500 kg or with a length of up to 3 meters. These processes ensure that our castings meet the highest standards of quality and durability.

CNC Machining

We provide high-precision machined castings using our advanced CNC machines. Our machine shop is equipped with multiple Horizontal Milling Centers (HMC), Vertical Milling Centers (VMC), and Turning Centers, allowing us to achieve an accuracy of up to 5 microns.

Pattern Shop and Tool Room

With extensive experience in tool manufacturing and new part development, our skilled pattern and die makers can produce high-precision sand casting patterns, as well as GDC and LPDC dies.

Quality Control

We maintain stringent quality control standards with our in-house metal spectroanalyzer, density index measurement, and ultimate tensile testing machines. All chemical and mechanical properties are managed according to international alloying standards. Our state-of-the-art Coordinate Measuring System (CMM) and a range of high-precision measuring instruments enable us to

deliver products that guarantee dimensional accuracy.

Leak Testing

We specialize in supplying SF6-tight grade castings and pressure-tight castings of various grades. Our in-house facilities for non-destructive leak testing ensure 0% leak-related customer rejections on-site.

Comprehensive Product Development

Your product is our component! We collaborate closely with our customers to understand your requirements, whether you provide a sample to be reproduced, a sketch, or fully developed drawings, including CAD files. Our casting process can create the nearest net shape for your application, with the option to cast inserts of other suitable metals, such as bushes, screws, and nuts. Subsequent machining is performed in our state-of-the-art CNC machine shop.

We offer additional finishing services, including shot blasting, heat treatment, powder coating, hard anodizing, copper spray, and silver coating, to meet your specific needs. Our expertise spans across sand casting, gravity die casting, and low-pressure die casting, ensuring we can deliver the precise, high-quality components your projects demand.

How do you see the future of the industry and what are your expansion / diversification plans ?

The global aluminium casting industry is currently valued at approximately \$70 billion and is on a strong growth trajectory. Projections



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Face to Face

indicate that the industry will expand significantly, reaching an estimated value of \$105 billion by 2030. This robust growth is driven by increasing demand across various sectors, including automotive, aerospace, construction, and electronics, where aluminum castings are valued for their strength, lightweight properties, and versatility. As industries continue to prioritize efficiency, sustainability, and innovation, the aluminum casting market is expected to play a pivotal role in meeting these evolving needs, contributing to its rapid expansion over the coming years.

What expectations do you (or the units of your size) have from the policy makers?

What the aluminium industry urgently needs from policymakers is a more balanced and fair pricing structure for raw materials. Currently, primary aluminium producers are significantly benefiting by setting prices based on the

premiums, customs duties, and adjusting for fluctuating foreign exchange rates. This practice places a heavy burden on downstream industries, particularly when it comes to maintaining competitiveness in export markets. To foster a truly competitive environment for exports, raw materials like aluminum should ideally be available at the LME rate, free from any additional duties and Premium within India. The industry is not seeking subsidies or special treatment, but rather a level playing field, especially for Micro, Small, and Medium Enterprises (MSMEs).

Additionally, making aluminium scrap duty-free is essential, as its use in manufacturing saves between 13 and 16 kWh of energy per kilogram compared to producing aluminium directly from bauxite. This energy savings is not only economically significant but also critical in accelerating India's journey toward carbon neutrality.

Another pressing issue for the industry is the availability

of reasonably priced land. Affordable land is crucial for the expansion and sustainability of manufacturing units, which are the backbone of the aluminum casting industry and other sectors dependent on it. Addressing these issues would greatly enhance the industry's global competitiveness and support India's broader environmental and economic goals.

How are you prepared for developing young leadership in the company ?

We are working on this Project. The average age of our 250 strong work force is 26 years. Most of our engineers are absolutely fresh and have no background in the field of foundry or Aluminium Castings. We are constantly & continuously trying to train them through various on job training, making them attend on line training Programs organised by various trade bodies . We have taken initiative to provide them training at our own plant in association with IIF on various functions of the Foundry Industry. We are investing heavily in retaining this young talent once they are trained. Similarly on management side we have induction of young "Maman Shah" after his PG and work experience in Germany. In his first three years at SUPERKINO he has obtained ISO14000 & ISO 45000 besides building completely new Production system for Foundry and we are seeing results in form of increased output from Foundry. As we go forward we would like to make best team out of available talent pool from existing work force. ■



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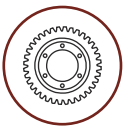
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National Foundry Day - 75th Anniversary Year

Event Overview

The Greater Mumbai Chapter of the Institute of Indian Foundrymen (IIF) commemorated the 75th Anniversary of National Foundry Day on August 20th, 2024, at The Ginger Hotel, Mumbai. This significant milestone celebrated the IIF's long-standing dedication to advancing the foundry industry, bringing together industry veterans, current members, and aspiring students for an evening of reflection, inspiration, and camaraderie.

Distinguished Guests and Dignitaries

The event was graced by esteemed personalities who have made remarkable contributions to the foundry sector. Mr. Vinod Kapur, Chairman of the Gargi Group, served as the Chief Guest. With his extensive experience and invaluable insights into the industry, Mr. Kapur's address resonated deeply with the audience, emphasizing the importance of innovation and adaptability in the evolving foundry landscape.

Aniruddh Kamdar, Managing Director of Kunkel Wagner, was the Guest of Honour. He provided a forward-looking perspective on foundry technology and underscored the pivotal role that IIF plays in shaping the future of the industry.

Ceremony Highlights

The celebrations commenced with the traditional lighting of the lamp, a symbolic gesture representing knowledge and enlightenment. This set a reverent tone for the evening, as all dignitaries were warmly welcomed to

the stage with applause. The Chief Guest and Guest of Honour were honored with shawls and mementos, followed by their heartfelt



speeches that reflected on the achievements of the IIF and the foundry industry, while also encouraging members to embrace future challenges with resilience.

Video Presentations

The event featured three impactful video presentations:

1. President's Message
Film: A poignant message from the IIF President, outlining the institute's vision and future goals.
2. Journey of IIF through 75 Years: A retrospective film that chronicled the IIF's milestones over the past 75 years, showcasing the growth and evolution of the foundry industry in India.
3. Promotion for IFEX 2025: A preview of the upcoming IFEX 2025 in Kolkata, highlighting its importance as a platform for innovation and collaboration in the foundry sector.

Felicitation of Office Bearers

The event also paid tribute to the past leadership of the IIF. Past Chairmen and Secretaries, who have served over the last 20 years, were

recognized for their dedication and leadership, each receiving a token of appreciation. Their contributions have been instrumental in steering the organization's mission and vision.

Celebrating the Newest Member

The enthusiasm of the next generation was celebrated by recognizing Miss Alisha Khedkar, the newest student member of the IIF. Her commitment to the foundry community was acknowledged, marking the beginning of her journey in the industry.

Interactive Session: Guess the Weight of the Casting Game
Adding a fun and engaging element to the evening, Miss Ruma Rao sponsored a game where attendees were invited to guess the weight of a casting. The room buzzed with excitement as guesses were made, and the winners, Mr. Manan Shah and Miss Alisha Khedkar, were rewarded with prizes.

Closing Ceremony

The event concluded with a Vote of Thanks delivered by Ian Nazareth, GMC Secretary, followed by a delightful dinner and drinks. The evening provided a platform for members to mingle, share experiences, and discuss the future of the foundry industry, reinforcing the strong bonds within the community. The 75th Anniversary of National Foundry Day was a resounding success, reflecting the IIF's unwavering commitment to excellence and innovation in the foundry sector. As the institute looks to the future, the evening served as a reminder of the rich legacy that continues to inspire new generations of foundry professionals.



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India's Infra Push To Boost Demand for Galvanized Steel Products

(Part Two)

Galvanizing – Present

Today, India has many galvanizing units which are competitive, energy efficient & eco-friendly in their operations. Improvements have taken place in heating & temperature control, ETP, metal economy, minimization of process wastes like Zinc ash, Zinc dross, flux regeneration etc. There are also a couple of big units where you can see enclosed covers over the galvanizing bath so that splashing is minimized, heat conserved and there is safety for the workers like in Shilpa Steel & Power Ltd at Nagpur (Fig-9).

It is well known that, a couple of years ago, India was the second fastest growing economy in the world. As per the World Steel Association, India is also the second largest steel producer in the world. Thanks to the impressive GDP growths and the increasing investments in infrastructure, galvanized steel consumption also has been on the rise continuously.

Zinc is the main input for galvanizing of steel products and structures. Hindustan Zinc Ltd, the only Zinc producer in the country, has been meeting 90% of India's demand. Production of Zinc for the last few years is as follows:

Zinc Production – India

Year	Production (tonnes)
2018-2019	695321
2019-2020	688000
2020-2021	715000
2021-2022	776000
2022-2023	821000

(Source: HZL)

About 30% zinc goes to the sheet sector, 20% in pipes, 15% in general and 5% in wire. In the sheet sector, the capacity for GP / GC / Galvalume is 10.00 million tonnes and for color coated steel sheets it is 3.0 million tonnes. The production (in million tonnes) for 2019-2020 is as follows:

2019-2020	
GP/GC/Galvalume	7.5
Color Coated Sheets	2.2

(Source: JPC)

Concrete being porous, absorbs moisture, CO₂, chloride ions due to capillary action, which attack the base steel leading to corrosion. Volume expansion of rust leads to concrete cracking, rust stains etc., Galvanized rebar is a proven method for rebar corrosion particularly in coastal areas, corrosive locations, immersed structures, petrochemical complexes etc., During the last few years, more and more galvanized rebars were used in commercial & residential constructions, guest houses, railway coach

washery etc. in Mumbai, Mangalore, Vizag, Ahmedabad etc.

After the launch of National Highway Development Programme (NHDP), the usage of galvanized guardrails/ crash barriers (Fig-10) picked up significantly across the country; the highway expansion programme will continue as well.

THE ROAD MAP

Category	Phase-1	Phase-2	Total
High-speed Corridor	15,246	21,296	36,542
Upgradation of roads to 2-half lanes	11,179	19,448	30,627
Remaining projects from Bharatmala-1	6,777	NA	6,777
Spur & Feeders to economic hubs	2,894	3,195	6,089
Strategic/International roads	2,379	2,841	5,220
Decongestion of NHs around cities	1,044	3,000	4,044
Port connectivity	1,607	NA	1,607
All Categories	41,126	49,780	90,906

All figures in KMs. Phase-1 (2024-25 to 2028-29) & Phase-2 (2029-30 to 2033-34)

In the recent years, the usage of galvanized high mast lighting columns has become popular in more cities and towns of India; airports, sea ports, railway yards, traffic junctions, bus terminals, stadiums etc. have been using such high mast lighting columns widely.

Due to the expansion of power & telecom sectors, the application of galvanized cable trays picked up momentum and this product also will grow in the years to come.

Investment in solar energy and wind energy have been on the rise during the last few years; the steel structures supporting



L. Pugazhenthya
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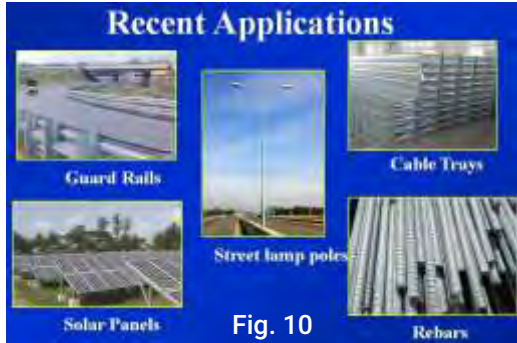


Fig. 10

Galvanizing – Future

In order to ensure a long maintenance free life and to maintain its integrity, any structure exposed to the atmosphere, especially public infrastructure, should be galvanized. There are a number of potential applications where hot dip galvanizing should be adopted: steel railings, foot over bridges, traffic sign posts, bus terminals, platform structures etc., (Fig-11).

Automobiles used in coastal zones and corrosive locations should use galvanized or galvanized



Fig. 11

sheets for their bodies (Fig-12), a practice widely used in many overseas countries. Galvanized steel sheets are

already used in bus body building in India.

(Fig-12)

India has announced a number of infrastructure

projects like Sagarmala, Bharatmala, Power for All, Jal Yojana, rural electrification, complete railway electrification, 100 smart cities, remaining highway

expansion, power programmes, telecom growth, migration to 5G etc., where plenty of steel structures will be used & hence there is an immense



Fig. 12

opportunity for the galvanizing industry.

India is planning to go in a big way for clean, renewable

energy, massive investments and more FDIs are likely to flow into the country. Steel structures used in wind energy and solar energy are hot dip galvanized.

By 2022 India aimed at 175 GW of renewable energy (Fig-13). This will be further increased in the coming

years 450GW by 2030. The priority is to shift from fossil fuels to natural resources like solar and wind. Roof top solar panels are also being used widely in hospitals, hotels, colleges, schools, commercial buildings, malls, railways etc., ultra mega solar parks have also come across the country and more are likely.

(Fig-13)

The latest development in India is the launch of Continuous Galvanized Rebar Plant first in the country, setup by a mini steel plant in Punjab, in association with International Zinc Association, with the support of Hindustan Zinc Ltd.

CONCLUSION

With the increasing investments in infrastructure, construction & automobile sectors, along with more domestic steel and zinc production, higher economic growth, infrastructure investments etc., India is certainly poised for a quantum jump in the application of hot dip galvanizing, thus minimizing corrosion losses.



Fig. 13

The financial savings thus made can be wisely used for more & more new infrastructure or social projects.

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Feature

The 29th CRU World Aluminium Conference Concludes

The 29th CRU World Aluminium Conference, held between May 14th and 16th, was co-hosted by the International Aluminium Institute (IAI) and the Aluminium Stewardship



Initiative (ASI). Renowned for its market updates, outlooks, forecasts, and economic analyses, this year's CRU conference notably shifted its focus towards sustainability. This thematic pivot resonates with the actions of the aluminium industry and underscores its commitment to fostering a greener future. IAI participation Women in Aluminium:



Preceding the main conference, an IAI-led Women in Aluminium roundtable addressed the significance of women's networks in bridging the gender gap within the sector. Pernelle Nunez, IAI

Deputy Secretary General / Director – Sustainability, highlighted that many



aluminium companies have established informal support networks for underrepresented groups. The Women in Aluminium initiative seeks to leverage and expand upon these models by creating an informal network specifically for women in the industry.



Sandrine Duquerroy-Delesalle, Crown Holdings' Sustainability & External Affairs Director EMEA and Rania Tayeh, Senior Manager – Corporate Social Responsibility at Emirates Global Aluminium (EGA), shared their experiences of women networks and how important they are to encouraging women from across the aluminium value chain to connect and support women to advance into leadership roles in the sector.

Keynote Session: On the first day of the main conference, IAI Secretary General Miles Prosser moderated a panel exploring how aluminium can



demonstrate its competitive advantage over alternative materials. Industry leaders discussed current efforts and future strategies to showcase aluminium's advantages, particularly from a sustainability standpoint. The panel included Ramon Arratia (Chief Sustainability Officer, Ball Corporation), Alok Ranjan (Chief Marketing Officer, Aluminium Business, Vedanta), Renato Bacchi (Executive Vice President and Chief Commercial Officer, Alcoa), John Thuestad (Executive Vice



President, Hydro Bauxite & Alumina), Abdulnasser Bin Kalban (CEO, Emirates Global Aluminium – EGA), and Amy Abraham (Vice President Sales Aluminium, Rio Tinto).

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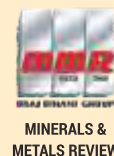
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In the afternoon session, Pernelle and other sustainability experts explored avenues for driving industry-wide change towards a 1.5-degree future, discussing topics such as global decarbonisation, emerging regulations, and emissions data verification. Pernelle was joined by Chris Bayliss, Climate Change and Decarbonisation Director, Aluminium Stewardship Initiative (ASI), Wenjuan Liu, Manager, RMI and Sandro Starita, Director

technologies in scrap sorting and alloy segregation to improve recycling efficiency. They also discussed transitioning from traditional



recycling methods to a more



Sustainability, European Aluminium. Circularity Panel: Day two of the conference focused on circularity, with a panel hosted by IAI's Marlen Bertram. Panellists examined current

holistic approach to circularity, emphasizing the design of recyclable, repairable, and upgradable products. Marlen's panel included Rachel Wiffen, Senior Process Engineer, Innoval Technology; Claudia

Trampitsch, CFO, AMAG Austria Metall AG; Rolf Lindbäck, CFO, Speira; Gabriel Carmona Aparicio, Circularity Research Manager, Aluminium Stewardship Initiative (ASI); Michael Boyle, President, Owl's Head Alloys and Gunther Schober, Sales Manager, PSI Metals Non-Ferrous GmbH. To conclude the day, IAI's Carl Firman led a panel discussion on updates in the bauxite and alumina market and the sector's decarbonisation efforts. He was joined on the panel by Anthony Everiss, Senior Consultant at CRU; Peter Rayers, Head of Decarbonisation at Klaveness Combination Carriers; and Vincent Rouget, Director of Global Risk Analysis at Control Risks. Interactive Session: The final day featured an interactive session where attendees explored recently developed tools and guidance for a 1.5-degree aligned aluminium sector. Experts from IAI, ASI, and RMI provided insights on GHG accounting methodologies, barriers to alignment, and existing initiatives and standards interplay. Pernelle Nunez, Chris Bayliss, Wenjuan Liu, and Hylla Barbosa (Associate—Climate Intelligence Program at RMI) were among the panellists.





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Concurrent shows





Feature

The Impact of China's Real Estate Crisis on Global Copper and Aluminium Markets

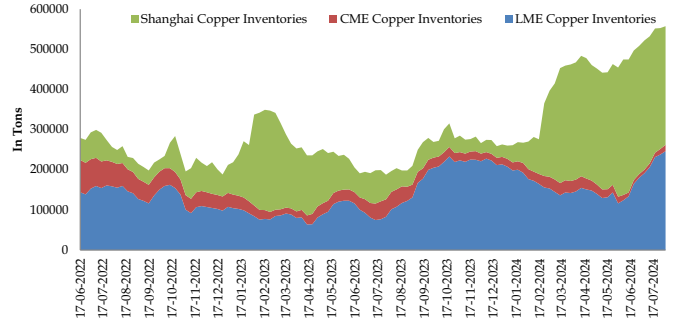
Copper prices witnessed a steep fall in July due to subdued demand from China and mounting inventories. Copper prices have corrected by approximately 4% in July. The third plenum meeting in China was closely watched by the base metals market, hoping for clues that the government would act swiftly to alleviate the protracted real estate downturn. Instead, the market was disappointed. For more than two years, the demand for base metals has been subdued by the real estate market. However, the plenum, a twice-decade political gathering, did not instil confidence that Beijing is on course to revive the economy by igniting a recovery in the residential

raise trade penalties on China and other countries which led to further pressure on base metal prices.

Global Copper Stocks:

Global copper inventories have grown to abnormally high levels. LME warehouses are receiving a large volume of exports from Chinese smelters, increasing inventories to a three-year high. The majority of these stocks have been deposited in Asian warehouses. Copper stocks on the Shanghai Futures Exchange (SHFE) have also seen strong gains. SHFE inventories have increased above 3,00,000 tons during the first half of July, a level not seen since 2020, when China was under lock down due to COVID 19. Shanghai Futures Exchange

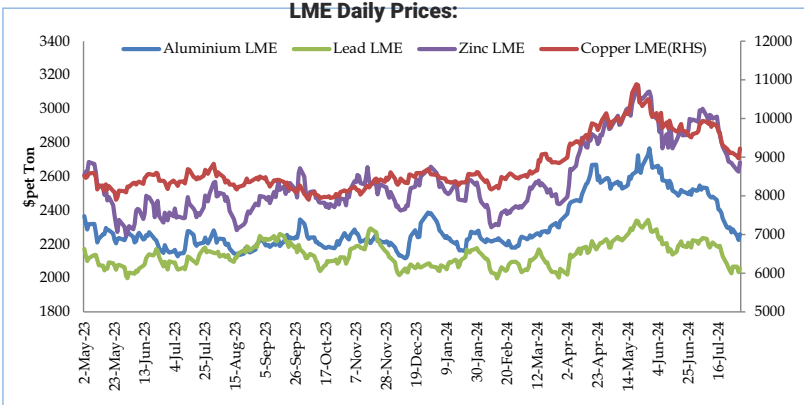
and weakness in the global manufacturing sector.



China Housing Market:

Since the real estate industry makes up a sizeable amount of China's consumption, the decline in the industry has severely impacted the demand for base metals. Housing starts and completion have plunged by over 20% on a year over year basis in the first six months of 2024. A deceleration in floor space completions has a substantial negative impact on the demand for copper and aluminium. Industry reports state that over 20% of China's total demand for copper and about 30% of China's total demand for aluminium comes from the country's real estate sector. Given the gap between building starts and metal usage, lower housing starts also have a substantial impact on future demand for copper and aluminium. The recovery

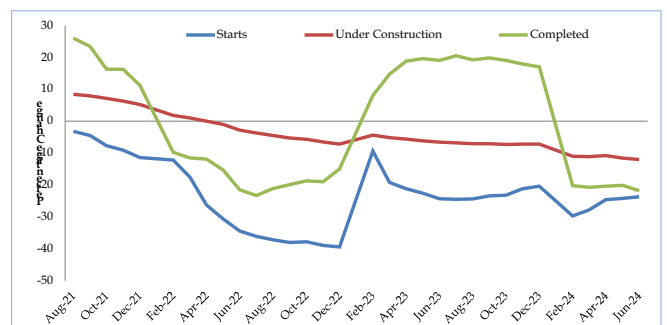
LME Daily Prices:



Source: Bloomberg, NB Research

real estate market. Market observers were particularly wary about China's economic prospects due to the possibility that if Donald Trump wins the U.S. presidential election in November and follows through on his pledge to

(ShFE) stocks are now at 295,141 tons, down only slightly from a four-year peak of nearly 337,000 tons in June. The key reason for the built up in inventories are the prolonged real estate crisis in China coupled with an increase in smelting capacity



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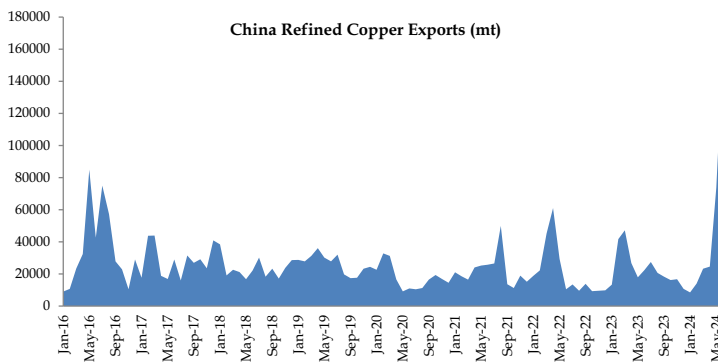


Feature

of completions usually lags by two to three years after the spike in starts.

China Import and Export Scenario:

China's imports of unwrought copper decreased in July compared to the same month last year due to lower demand and increased metal inventories. Imports of unwrought copper and products were 438,000 metric tons last month, down 2.9% from 451,159 tons a year earlier, data from the General Administration of Customs showed. The decline in imports coincides with persistently poor demand in the world's top consumer for the metal used in the building and power industries. Meanwhile, China's refined copper exports reached a record high as smelters resorted to overseas markets due to the world's largest metals buyer's slack demand. Customs data shows that shipments more than doubled to 157,751 tons in June from May, much above the previous all-time high of



102,000 tons in 2012.

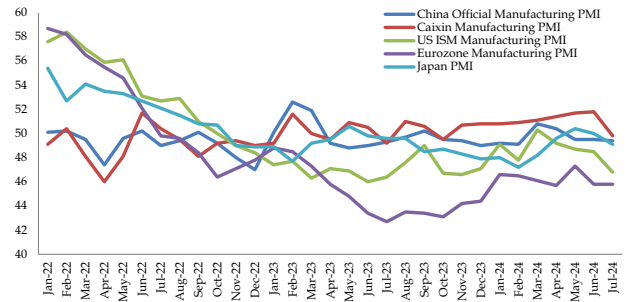
Manufacturing Scenario:

China's manufacturing activity dropped to its lowest

level in five months in July due to an ongoing property crisis. Additionally, retail sales, financial services, and real estate services all saw declines. China's official manufacturing PMI edged lower in July to 49.4 from 49.5 in the previous two months. This is the third consecutive month of contraction in the manufacturing sector, as the new orders component continued to fall in July. Meanwhile, indicators for input and output prices were also dragged down in July from June by poor market outlook. China's Caixin manufacturing PMI flipped into contraction in July, dropping to 49.8 from 51.8 in June. Unlike the official PMI, this is the first contraction reading in nine months as Caixin focuses on private and export-oriented firms. Meanwhile, The United States ISM PMI declined in July to the lowest level in seven months amid a slump in new orders. The manufacturing PMI dropped to 46.8 in July from 48.5 in the previous month. A PMI

reading below 50 indicates contraction in the manufacturing sector, which accounts for 10.3% of the

economy.



Outlook:

Analysing the key market indicators we are of the view that post the sharp decline in Copper price in July we could see prices stabilize and move upwards. We expect prices to hold the recent low of Rs.765 on MCX and on the up side we can see prices touch Rs.800-810 in the near term. While the third plenum disappointed with providing immediate steps to support the property sector it focused on the green energy sector. It focused on carbon reduction, pollution reduction, and improvement of environmental governance systems and low-carbon development mechanisms. Since copper is utilized in everything from electric vehicles to wind turbines and power grids, while aluminium is used in wind power, energy storage, and hydroelectricity, the push for green energy will primarily benefit copper and aluminium. Electric vehicles (EVs) utilize about 30% more aluminium than internal combustion engine (ICE) vehicles.



Copper prices slump to two-week low as China's economic woes fuel demand worries; further downside limited, say experts



Copper prices plunged to their lowest in more than two weeks as weak economic data in the world's biggest metals consumer China raised demand concerns. MCX Copper prices were trading 0.2% lower at ₹783.80 per kg and hit a low of ₹780.90 during the session, tracing three-month copper on the London Metal Exchange (LME) that dropped 2% to \$8,996.50 a metric ton, its weakest since August 15. US Comex copper futures slid 2.9% to \$4.05 a lb.

The drop in copper prices is largely attributed to weak economic data from China, particularly in the manufacturing and property sectors, which has heightened concerns about reduced demand for the red metal.

China's manufacturing activity fell to a six-month low in August, while the growth in new home prices has slowed, data showed, further dampening copper demand from these key sectors.

"China's ongoing property sector crisis is dampening copper demand. The strengthening of the US dollar, which reached a two-week high, has exerted additional downward pressure on copper prices. Copper inventories have increased at LME-monitored warehouses, adding to market pressure. Copper is trading below its 200-day moving average, indicating further downside risk. Market sentiment remains cautious due to weak global demand and strong dollar influence," said Ajay Kedia, Director of Kedia Advisory.

Moreover, Goldman Sachs cut its 2025 copper price forecast sharply on Monday, projecting an average price of \$10,100 a ton, down from its previous forecast of \$15,000, Reuters reported.

Outlook for Copper

Kedia believes while the outlook remains cautious for copper, further downside seems to be restricted as potential stimulus measures from China and interest rate cuts by the US Federal Reserve could provide some support.

India trade ministry proposes anti-dumping duty on Chinese aluminium foil imports



The Directorate General of Trade Remedies (DGTR) under the Ministry of Commerce and Industry on Friday recommended the imposition of an anti-dumping duty on aluminium foils imported from China, after observing that Chinese imports had captured 30 per cent of the Indian market despite sufficient domestic capacity.

This follows a request for an inquiry from Hindalco, one of India's largest aluminium manufacturing companies, on the grounds of injury to domestic companies. Other applicants included Shyam Sel & Power Ltd, Venkateshwara Electrocast Pvt. Ltd, and Ravi Raj Foils Ltd.

Anti-dumping investigations are conducted by countries to determine whether domestic industries have been harmed due to a surge in cheap imports. The Ministry of Finance makes the final decision on whether to impose duties.

China's aluminium processing industry PMI hovers below 50% in August despite M-o-M growth

China's comprehensive Purchasing Managers' Index (PMI) for the aluminium processing industry witnessed an increase of 1.8 percentage point month-on-month, yet stood below the 50 per cent mark during August 2024, owing to the persistent traditional off-season in the domestic market. According to the Shanghai Metals Market survey, China's PMI for the domestic aluminium processing industry was recorded at 43.6 per cent, with a few sectors standing as an exception above the 50 per cent mark. While the PMIs for China's domestic construction aluminium extrusion and plate/sheet, strip and foil segment were below the 50 mark, the industrial extrusion segment and aluminium wire and cable sector witnessed PMIs of 51.97 per cent and 50.5 per cent. Although certain sectors recovered from the traditional off-season but not enough to offset the decline in the construction aluminium and aluminium plate/sheet, strip and foil industry, with the production index at 36.2 per cent, attributed to fewer new orders for aluminium foil products and vigilance followed by construction material companies about accepting new orders due to payment security issues. The new orders index was also below the 50 mark, at 40.1 per cent.



Innovative aluminium technologies from Zhengzhou Research Institute recognised for low carbon excellence

Recently, the Carbon Research Institute of Zhengzhou Research Institute of Chinalco achieved recognition for three significant technical advancements. These innovations have been officially designated as "Green and Low Carbon Advanced Technological Achievements of Henan Province (2024)." The three innovations are: Comprehensive Utilization Technology of Classified Resources of Aluminum Electrolytic Overhaul Slag - This enables the efficient classification and recovery of valuable elements from overhaul slag. The resulting building material products meet the required standards, while the graphitized products comply with the specifications for calcined petroleum coke used in graphitized cathode carbon blocks (YS/T 763-2019). This technology has been implemented across four enterprises. It has been evaluated by the China Nonferrous Metals Industry Association, which confirmed that the overall technology is at the international leading level. Technology for Improving the Oxidation Resistance of Carbon Anodes for Aluminum - This technology focuses on understanding how trace elements affect anode oxidation performance. It includes advancements in enhancing anode oxidation resistance and the development of new antioxidant composite additives that slow down the oxidation reaction rate. With this technology, even when using low-quality raw materials (sulfur \leq 3.5%, vanadium \leq 500 ppm, sodium \leq 350 ppm, calcium \leq 400 ppm, iron \leq 700 ppm, and nickel \leq 350 ppm), the air reaction residual rate of the anode can reach 85% or higher, and the CO₂ reaction residual rate can be 90% or higher.

Key Technologies and Equipment for Green Energy Saving in Carbon Roasting for Aluminum-

The technology has introduced energy-saving diagnostic technology, specialized instruments, and national standard samples. It includes energy-saving operational technology for in-production roasters and features an innovatively designed, multi-factor optimized energy-saving roaster and a large industrial kiln. This comprehensive energy-saving technology and equipment have reduced the unit consumption of natural gas for anodes to below 55 Nm³/t and for cathodes to 30 Nm³/t, achieving an international leading standard.

Sundaram Clayton's new Tamil Nadu unit begins production of aluminium die castings



The plant, in its initial phase, has an annual production capacity of 7,750 tonnes of aluminium die castings. Shares of Sundaram Clayton Ltd ended at ₹1,788.50, up by ₹44.65, or 2.56%, on the BSE. Auto component manufacturer Sundaram Clayton Ltd on Thursday (September 5) announced the start of commercial production of aluminium die castings at its newly-commissioned facility in the SIPCOT industrial area in Tiruvallur district, Tamil Nadu. "...we wish to inform that the Company has commissioned the commercial production of Aluminium Die Castings effective today situated in the industrial area of the State Industries Promotion Corporation of Tamil Nadu (SIPCOT) in Theruvoy Kandigai, Tiruvallur District, Tamil Nadu," Sundaram Clayton said in a regulatory filing. The plant, in its initial phase, has an annual production capacity of 7,750 tonnes of aluminium die castings. The company has indicated that further updates on the facility's progress and potential capacity expansions will be provided in the future. "The plant, in its initial phase, has an annual production capacity of 7,750 metric tonnes (MT) of aluminium die castings. The company has indicated that further updates on the facility's progress and potential capacity expansions will be provided in the future," it said.

Ramkrishna Forgings to invest in aluminium forging project for EV market

Ramkrishna Forgings said on Monday its board has approved the setting up of an aluminium forging facility at Jamshedpur at an investment of ₹57.5 crore to cater to the EV market. "The project will be set up with a total installed capacity of 3000 mt per annum and is expected to be commissioned by Q2FY26. At the optimum capacity the project will generate additional revenue of ₹175 crore per annum for the company," Ramkrishna Forgings said in a statement. "In yet another step towards accelerating the transition to sustainable transportation, we are proud to announce our



upcoming aluminium forging project, which will increase our footprint in the EV market in a big way,” said Naresh Jalan, managing director, Ramkrishna Forgings. “With a focus on engineering and tech enabled automotive solutions catering to the future of mobility, the company’s innovation efforts are focused to develop pioneering technologies that are sustainable as well as suited to evolving aspirations of the market and the customers,” he said. The company has manufacturing facilities in Jamshedpur along with offices in the US, Mexico and Turkey. The company also said that its board has approved the divestment of a 100 per cent stake in wholly owned

subsidiary Globe All India Services Limited to Yatra Online for ₹128 crore, net of debt.



Base metals decline amid ongoing concerns over demand outlook.

Nonferrous metal prices declined, affected by concerns over the upcoming U.S. elections and potential economic policies that may influence commodity demand. On the London Metal Exchange (LME), three-month copper dropped 0.1% to \$9,081 per metric ton as of 0138 GMT, while the most-traded October copper contract on the Shanghai Futures Exchange (SHFE) rose 0.7% to 72,420 yuan (\$10,218.13) per ton.

LME copper is heading for a second consecutive weekly loss, down 1.5%, with SHFE copper also set for a weekly decline. Analysts at Citi project copper prices at \$9,500 per ton over the next three months, with aluminum at \$2,500 and zinc at \$2,800, noting that potential trade tariffs from a Trump presidency could dampen demand recovery.

Analysts remain cautious about base metals until after the U.S. elections, expecting more clarity on U.S.-China policies and market sentiment once Fed rate cuts progress. Investors are still waiting for economic data to confidently rebuild positions in metals, seen as proxies for global growth.

Despite this, tight supply in the copper concentrate market lent some support, with Chile’s copper commission Cochilco forecasting a shortage of mined copper until 2025.

Other LME metals also saw declines: nickel fell 0.4% to \$16,010 per ton, zinc dropped 0.7% to \$2,781, lead dipped 0.4% to \$1,988, and tin fell 0.6% to \$30,595. Aluminum remained steady at \$2,378.50. In Shanghai, aluminum dropped 0.5%, nickel fell 1%, zinc declined 2.4%, lead lost 1.5%, and tin was almost unchanged.





Passenger Vehicle Sales Decline, While 2W & 3W Show Growth In July 2024: SIAM

India's passenger car sales in July 2024 stood at 3,41,510 units, according to data released by the Society of Indian Automobile Manufacturers (SIAM). Three-Wheeler sales in the same month were 59,073 units, while two-wheeler sales totalled 14,41,694 units, the data showed. In June, total passenger vehicle sales were recorded at 3,37,757 units, compared to 3,27,788 units in June 2023.

Automobile exports from India rose 15.5 per cent year-on-year in the June quarter with all verticals, barring three-wheelers, recording growth in shipments, according to the latest SIAM data.

Overall shipments stood at 11,92,577 units in the first quarter the current fiscal year, as compared with 10,32,449 units in the same period of the last fiscal.

Passenger vehicle exports stood at 1,80,483 units in the first quarter, registering a jump of 19 per cent over 1,52,156 units in the same period last year. Maruti Suzuki India led the space with shipments of 69,962 units in the period under review. It exported 62,857 units in the first quarter of the 2023-24 fiscal.

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Commenting on sales data of July 2024, Mr Vinod Aggarwal, President, SIAM said, "Though Three-Wheeler and Two-Wheeler segments are performing well, there has been some degrowth of Passenger Vehicles and Commercial Vehicles in July 2024, compared to July 2023. The above average rainfall coupled with upcoming festive season is likely to again propel growth in the short term. In addition, enabling budget announcements which emphasizes on overall economic growth with fiscal support for infrastructure and rural sector should augur well for the Auto sector in the medium term."

Commenting on July-2024 performance, Mr Rajesh Menon, Director General, SIAM said, "In July 2024, Passenger vehicle segment de-grew by (-)2.5% compared to July 2023, posting a sale of about 3.42 lakh units. Three Wheelers posted a growth of 5.1% compared to July last year, with sales of 0.59 Lakh units in July 2024, which is close to the peak of 2018-19. Two-Wheeler segment also posted a decent growth of 12.5% in July 2024 as compared to July 2023, with sales of 14.42 Lakh units".





SIAM									
Segment wise Comparative Production, Domestic Sales & Exports data for the month of July 2024									
(Number of Vehicles)									
Category Segment/Subsegment	Production		Domes			Exports			
	July		July			July			
	2023	2024		2023	2024	2023	2024		
Passenger Vehicles*									
Passenger Cars	1,67,138	1,49,410	-10.6%	1,09,8	96,65	-12.0%	38,63	33,18	-14.1%
Utility Vehicles	2,12,369	2,34,747	10.5%	1,80,8	1,88,2	4.1%	20,22	28,09	38.9%
Vans	13,587	13,697	0.8%	12,03	11,91	-1.0%	733	651	-11.2%
Total Passenger Vehicles	3,93,094	3,97,854	1.2%	3,02,7	2,96,7	-2.0%	59,59	61,92	3.9%
Three Wheelers									
Passenger Carrier	72,808	79,415	9.1%	44,48	48,33	8.7%	26,51	26,83	1.2%
Goods Carrier	9,654	8,721	-9.7%	8,836	8,312	-5.9%	255	239	-6.3%
E-Rickshaw	2,723	2,153	-20.9%	2,745	2,253	-17.9%	-	-	-
E-Cart	157	216	37.6%	142	177	24.6%	-	-	-
Total Three Wheelers	85,342	90,505	6.0%	56,20	59,07	5.1%	26,77	27,07	1.1%
Two Wheelers									
Scooters	4,63,987	6,54,748	41.1%	4,28,6	5,53,6	29.2%	44,82	50,02	11.6%
Motorcycles	11,07,752	12,49,903	12.8%	8,17,2	8,50,4	4.1%	2,56,4	2,73,8	6.8%
Mopeds	36,675	43,572	18.8%	36,20	37,56	3.7%	216	1,044	383.3%
Total Two Wheelers	16,08,414	19,48,223	21.1%	12,82,	14,41,	12.5%	3,01,5	3,24,9	7.8%
Quadricycle	356	556	56.2%	118	19	-83.9%	252	720	185.7%
Grand Total	20,87,206	24,37,138	16.8%	16,41,	17,97,	9.5%	3,88,1	4,14,6	6.8%
* BMW, Mercedes, JLR, Tata Motors and Society of Indian Automobile Manufacturers (

SIAM									
Summary Report: Cumulative Production, Domestic Sales & Exports data for the period of April-July 2024									
Report I									
(Number of Vehicles)									
Category Segment/Subsegment	Production		Dome			Exports			
	April-July		April-July			April-July			
	2023-24	2024-25		2023-	2024-	2023-	2024-		
Passenger Vehicles*									
Passenger Cars	6,67,659	5,85,138	-12.4%	5,23,	4,37,	-16.4%	1,33,	1,34,	0.5%
Utility Vehicles	8,14,514	9,62,031	18.1%	7,28,	8,34,	14.6%	75,64	1,05,	39.8%
Vans	48,114	54,209	12.7%	47,68	50,83	6.6%	2,677	2,564	-4.2%
Total Passenger Vehicles	15,30,287	16,01,378	4.6%	12,99	13,	1.8%	2,11,	2,42,	14.5%
Three Wheelers									
Passenger Carrier	2,55,681	2,79,646	9.4%	1,58,	1,81,	14.7%	99,44	97,31	-2.1%
Goods Carrier	33,421	38,007	13.7%	30,56	35,15	15.0%	684	1,040	52.0%
E-Rickshaw	8,839	5,554	-37.2%	10,30	5,972	-42.0%	-	-	-
E-Cart	958	1,029	7.4%	1,235	1,084	-12.2%	-	-	-
Total Three Wheelers	2,98,899	3,24,236	8.5%	2,00,	2,24,	11.7%	1,00,	98,35	-1.8%
Two Wheelers									
Scooters	18,71,295	24,47,009	30.8%	17,26	22,	28.5%	1,70,	2,06,	20.7%
Motorcycles	44,88,817	51,94,451	15.7%	35,54	40,	13.9%	9,21,	10,40	12.9%
Mopeds	1,46,744	1,65,949	13.1%	1,41,	1,60,	13.3%	600	1,824	204.0%
Total Two Wheelers	65,06,856	78,07,409	20.0%	54,23	64,	18.5%	10,92	12,48	14.2%
Quadricycle	1,464	2,699	84.4%	261	98	-62.5%	1,244	2,634	111.7%
Grand Total	83,37,506	97,35,722	16.8%	69,23	79,	15.2%	14,05	15,91	13.2%
* BMW, Mercedes, JLR, Volvo Auto data is not Society of Indian Automobile Manufacturers (



SIAM														
Category & Company wise Summary Report for the month of July 2024 and Cumulative for April-July 2024														
													Report II	
													(Number of Vehicles)	
Category	Production	Dome			Exports									
Segment/ Manufacturer	July	April-July	July	Apr	July	April-July				2023	2024	2023	2024	
	2023	2024	2023-24	2024-25	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024
Passenger Vehicles														
FCA India Automobiles Pvt	959	772	3,691	2,081	429	273	2,21	1,27	388	428	1,76	704		
Force Motors Ltd	144	305	402	746	142	162	383	594		10	2	10		
Honda Cars India Pvt Ltd	6,580	8,070	24,580	33,210	4,864	4,62	19,9	18,6	1,11	2,71	6,17	20,7		
Hyundai Motor India Ltd	69,188	72,204	2,49,850	2,55,580	50,701	49,0	1,99,	1,98,	16,0	15,5	51,1	58,1		
Isuzu Motors India Pvt Ltd	-	43	90	313	33	22	136	131						
JSW MG Motor India Pvt	3,558	1,992	20,564	9,336	3,308	2,90	17,9	11,6						
Kia Motors India Pvt Ltd	31,301	25,503	1,11,573	88,208	20,002	20,5	81,3	81,2	6,41	2,50	28,9	10,2		
Mahindra & Mahindra Ltd	38,966	43,188	1,37,201	1,68,968	36,205	41,6	1,36,	1,65,	1,34	389	4,72	2,68		
Maruti Suzuki India Ltd	1,82,733	1,82,841	6,36,846	6,70,060	1,52,126	1,37,	5,66,	5,56,	22,0	23,8	84,9	93,8		
Nissan Motor India Pvt Ltd	7,112	9,393	22,365	31,204	2,152	1,99	9,93	8,71	4,00	4,37	9,93	17,1		
PCA Motors Pvt. Ltd	1,221	253	4,376	1,559	388	335	3,20	1,59	149	513	852	1,90		
Renault India Pvt Ltd	6,438	6,380	19,074	16,177	3,607	2,83	18,0	13,8	1,78	78	4,95	2,33		
SkodaAuto India Pvt Ltd	5,529	1,786	19,830	9,396	4,207	2,10	15,7	10,1	145	114	670	510		
Tata Motors Ltd*	NA	NA	1,43,601	1,48,081	NA	NA	1,43,	1,43,	NA	NA	361	632		
Toyota Kirloskar Motor Pvt	28,264	35,304	1,05,536	1,27,793	20,749	29,5	72,2	97,8	1,15	2,12	4,90	6,95		
Volkswagen India Pvt Ltd	11,101	9,820	30,708	38,666	3,814	3,40	13,5	12,9	5,00	9,24	12,4	26,5		
Total Passenger	3,93,094	3,97,854	15,30,287	16,01,378	3,02,727	2,96,	12,9	13,2	59,5	61,9	2,11,	2,42,		
* Only cumulative data is		NA= Not												

SIAM														
Category & Company wise Summary Report for the month of July 2024 and Cumulative for April-July 2024														
													Report II	
													(Number of Vehicles)	
Category	Production	Dome			Exports									
Segment/ Manufacturer	July	April-July	July	Apr	July	April-July				2023	2024	2023	2024	
	2023	2024	2023-24	2024-25	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024
Three Wheelers														
Atul Auto Ltd	2,167	2,533	5,542	10,009	1,903	2,25	4,65	8,50	207	319	543	722		
Bajaj Auto Ltd	51,995	61,583	1,87,121	2,07,172	37,155	42,1	1,35,	1,50,	13,3	13,7	51,8	54,8		
Continental Engines Pvt	556	347	1,928	1,498	535	501	1,75	1,66						
Force Motors Ltd	332	-	1,179	672	-	-	-	-	196		1,20	518		
Mahindra & Mahindra Ltd	6,407	3,189	23,178	21,129	6,481	3,59	24,2	21,2	38		55	252		
Piaggio Vehicles Pvt Ltd	9,706	8,142	32,972	37,383	8,426	7,65	28,3	32,5	813	834	3,94	4,32		
TI Clean Mobility Pvt Ltd	119	498	240	2,364	170	641	225	2,40						
TVS Motor Company Ltd	14,060	14,213	46,739	44,009	1,534	2,30	5,88	7,60	12,1	12,1	42,5	37,6		
Total Three Wheelers	85,342	90,505	2,98,899	3,24,236	56,204	59,0	2,00,	2,24,	26,7	27,0	1,00,	98,3		
Two Wheelers														
Ather Energy Pvt. Ltd	7,973	11,097	33,939	36,563	8,062	11,0	34,6	34,9		40		80		
Bajaj Auto Ltd	2,80,086	3,07,861	11,51,083	12,36,529	1,41,390	1,68,	6,84,	7,51,	1,26	1,28	4,73,	4,97,		
Chetak Technology Ltd	114	-	609	-	600	-	916	-						
Hero MotoCorp Ltd	3,87,151	4,23,096	17,07,039	19,31,927	3,71,204	3,47,	16,8	18,3	20,1	22,7	55,4	73,7		
Honda Motorcycle &	3,37,356	5,40,885	13,57,722	20,52,628	3,10,872	4,39,	12,6	18,5	27,4	43,9	1,03,	1,82,		
India Kawasaki Motors Pvt	333	329	998	932	337	254	1,45	1,32						
India Yamaha Motor Pvt	80,138	86,342	2,95,369	3,33,757	61,884	55,8	2,26,	2,41,	13,7	19,6	61,8	79,0		
Okinawa Autotech Pvt. Ltd	328	134	877	243	3,056	40	3,70	132						
Piaggio Vehicles Pvt Ltd	4,519	4,492	17,954	21,559	2,988	2,84	11,9	12,2	1,71	2,19	6,19	9,67		
Royal-Enfield (Unit of	83,515	92,200	3,19,273	3,36,319	66,062	61,2	2,73,	2,65,	7,05	6,05	27,5	28,2		
Suzuki Motorcycle India	1,01,794	1,19,703	3,61,514	4,22,433	80,309	1,00,	2,77,	3,51,	27,5	16,1	90,9	64,1		
Triumph Motorcycles India	37	31	135	133	60	66	255	411						
TVS Motor Company Ltd	3,25,070	3,62,053	12,60,344	14,34,386	2,35,230	2,54,	9,56,	10,8	77,0	85,4	2,74,	3,13,		
Total Two Wheelers	16,08,414	19,48,223	65,06,856	78,07,409	12,82,054	14,4	54,2	64,2	3,01	3,24	10,9	12,4		
Quadricycle														
Bajaj Auto Ltd	356	556	1,464	2,699	118	19	261	98	252	720	1,24	2,63		
Total Quadricycle	356	556	1,464	2,699	118	19	261	98	252	720	1,24	2,63		
Grand Total	20,87,206	24,37,138	83,37,506	97,35,722	16,41,103	17,9	69,2	79,7	3,88	4,14	14,0	15,9		
Society of Indian Automobile														



SIAM													
Segment & Company wise Production, Domestic Sales & Exports Report for the month of July 2024 and													
													Report III
													(Number of Vehicles)
Category	Production	Dome				Exports							
Segment/ Manufacturer	July	April-July	July	April	July	April-July							
	2023	2024	2023-24	2024-25	2023	2024	2023-2024	2023	2024	2023-2024	2023	2024	2023-2024
Passenger Vehicles													
A: Passenger Cars													
Honda Cars India Ltd	6,570	4,318	24,570	14,969	4,864	3,28	19,9	11,82	1,11	268	5,90	7,61	
Hyundai Motor India Ltd	32,993	31,925	1,22,449	1,09,312	17,710	16,0	82,3	64,7			41,2	47,1	
JSW MG Motor India	NA	NA	3,052	NA	NA	NA	1,91	NA					-
Maruti Suzuki India Ltd	1,14,393	97,267	4,26,314	3,69,854	78,040	69,2	3,33,	2,9			9,55	66,9	45,7
Nissan Motor India Pvt	3,871	6,039	8,596	15,412	-	-	-	-	3,61	4,33	8,49	13,5	
Renault India Pvt Ltd	1,068	2,007	4,520	4,517	762	565	3,99	2,88	445	40	1,74	905	
SkodaAuto India Pvt Ltd	2,466	1,060	8,690	4,650	1,654	793	6,70	4,83			9	10	
Tata Motors Ltd*	NA	NA	50,413	40,938	NA	NA	51,2	37,5	NA	NA	57	575	
Toyota Kirloskar Motor	195	140	622	566	5,092	4,96	17,7	18,4					-
Volkswagen India Pvt	5,582	6,654	18,433	24,920	1,737	1,76	6,66	6,21	2,90	6,69	9,06	18,5	
Total A: Passenger	1,67,138	1,49,410	6,67,659	5,85,138	1,09,859	96,6	5,23,	4,3			1,33,	1,34,	
B: Utility Vehicles													
FCA India Automobiles	959	772	3,691	2,081	429	273	2,21	1,27	388	428	1,76	704	
Force Motors Ltd	144	305	402	746	142	162	383	594		10	2	10	
Honda Cars India Ltd	10	3,752	10	18,241	-	1,34	-	6,77			2,44	266	13,1
Hyundai Motor India Ltd	36,195	40,279	1,27,401	1,46,268	32,991	32,9	1,16,	1,3	2,62	3,25	9,86	10,9	
Isuzu Motors India Pvt	-	43	90	313	33	22	136	131					-
JSW MG Motor India	3,558	1,992	17,512	9,336	3,308	2,90	16,0	11,67					-
Kia Motors India Pvt Ltd	31,301	25,503	1,11,573	88,208	20,002	20,5	81,3	81,2	6,41	2,50	28,9	10,2	
Mahindra & Mahindra	38,931	43,188	1,37,076	1,68,903	36,205	41,6	1,36,	1,6	1,31	389	4,62	2,61	
Maruti Suzuki India Ltd	54,788	71,877	1,62,587	2,51,094	62,049	56,3	1,88,	2,1	4,19		15,4	45,6	
Nissan Motor India Pvt	3,241	3,354	13,769	15,792	2,152	1,99	9,93	8,71	392	39	1,43	3,68	
PCA Motors Pvt. Ltd	1,221	253	4,376	1,559	388	335	3,20	1,59	149	513	852	1,90	
Renault India Pvt Ltd	5,370	4,373	14,554	11,660	2,845	2,26	14,0	10,9	1,33	38	3,20	1,43	
SkodaAuto India Pvt Ltd	3,063	726	11,140	4,746	2,553	1,31	9,02	5,30	145	114	661	500	
Tata Motors Ltd*	NA	NA	93,144	1,02,111	NA	NA	88,8	1,0	NA	NA	273	3	
Toyota Kirloskar Motor	28,069	35,164	1,04,914	1,27,227	15,657	24,5	54,4	79,4	1,15	2,12	4,90	6,95	
Volkswagen India Pvt	5,519	3,166	12,275	13,746	2,077	1,64	6,86	6,77	2,10	2,54	3,37	8,01	
Total B: Utility	2,12,369	2,34,747	8,14,514	9,62,031	1,80,831	1,88,	7,28,	8,3			75,6	1,05,	
C: Vans													
Mahindra & Mahindra	35	-	125	65	-	-	10	-	34		104	75	
Maruti Suzuki India Ltd	13,552	13,697	47,945	49,112	12,037	11,9	44,7	45,7	699	651	2,54	2,43	
Tata Motors Ltd*	NA	NA	44	5,032	NA	NA	2,96	5,12	NA	NA	31	54	
Total C: Vans	13,587	13,697	48,114	54,209	12,037	11,9	47,6	50,8	733	651	2,67	2,56	
Total Passenger	3,93,094	3,97,854	15,30,287	16,01,378	3,02,727	2,96,	12,9	13,2			2,11,	2,42,	

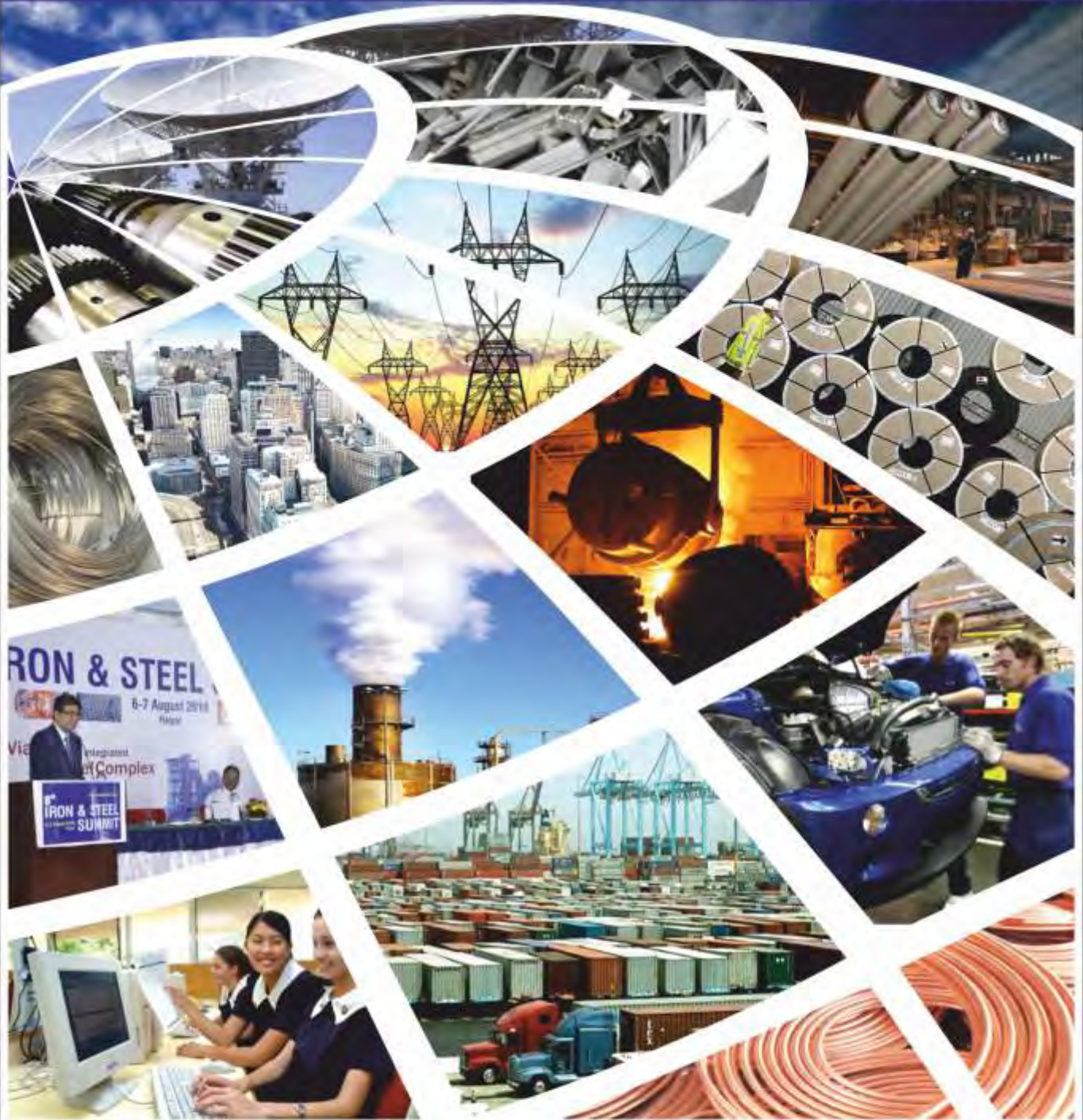
SIAM													
Segment & Company wise Production, Domestic Sales & Exports Report for the month of July 2024 and													
													Report III
													(Number of Vehicles)
Category	Production	Domes				Exports							
Segment/ Manufacturer	July	April-July	July	April	July	April-July							
	2023	2024	2023-24	2024-25	2023	2024	2023-2024	2023	2024	2023-2024	2023	2024	2023-2024
Three Wheelers													
A: Passenger Carrier													
Atul Auto Ltd	899	1,227	2,333	3,723	662	813	1,65	2,58	193	316	525	703	
Bajaj Auto Ltd	47,502	56,085	1,70,913	1,88,630	33,104	37,8	1,20,	1,3			51,4	54,2	
Continental Engines Pvt	102	74	413	288	102	98	392	305					-
Force Motors Ltd	332	-	1,179	672	-	-	-	-	196		1,20	518	
Mahindra & Mahindra	3,275	1,384	11,236	13,326	3,313	1,31	10,8	13,3	24		37	132	
Piaggio Vehicles Pvt Ltd	6,549	5,942	22,705	26,910	5,637	5,32	19,0	22,4	727	814	3,66	4,06	
TI Clean Mobility Pvt Ltd	119	498	240	2,364	170	641	225	2,40					-
TVS Motor Company Ltd	14,030	14,205	46,662	43,733	1,493	2,28	5,76	7,46			42,5	37,6	
Total A: Passenger	72,808	79,415	2,55,681	2,79,646	44,481	48,3	1,58,	1,8			99,4	97,3	
E-Rickshaw													
Atul Auto Ltd	328	381	1,812	1,824	353	412	1,63	1,87					-
Continental Engines Pvt	408	166	1,321	717	356	266	1,19	840					-
Mahindra & Mahindra	1,987	1,606	5,706	3,013	2,036	1,57	7,47	3,25					-
Total E-Rickshaw	2,723	2,153	8,839	5,554	2,745	2,25	10,3	5,97					-
B: Goods Carrier													
Atul Auto Ltd	829	757	848	3,753	795	925	818	3,43	14	3	18	19	
Bajaj Auto Ltd	4,493	5,498	16,208	18,542	4,051	4,27	14,9	16,8	136	216	368	584	
Continental Engines Pvt	-	99	137	409	32	110	117	437					-
Mahindra & Mahindra	1,145	159	5,884	4,554	1,128	652	5,28	4,19	14		18	120	
Piaggio Vehicles Pvt Ltd	3,157	2,200	10,267	10,473	2,789	2,32	9,25	10,0	86	20	275	258	
TVS Motor Company Ltd	30	8	77	276	41	17	123	144	5		5	59	
Total B: Goods Carrier	9,654	8,721	33,421	38,007	8,836	8,31	30,5	35,1	255	239	684	1,04	
E-Cart													
Atul Auto Ltd	111	168	549	709	93	103	539	609					-
Continental Engines Pvt	46	8	57	84	45	27	45	83					-
Mahindra & Mahindra	-	40	352	236	4	47	651	392					-
Total E-Cart	157	216	958	1,029	142	177	1,23	1,08					-
Total Three Wheelers	85,342	90,505	2,98,899	3,24,236	56,204	59,0	2,00,	2,2			1,00,	98,3	



SIAM													
Segment & Company wise Production, Domestic Sales & Exports Report for the month of July 2024 and Cumulative for April-July 2024													
												Report III	
												(Number of Vehicles)	
Category	Production	Domestic Sales				Exports							
		July	April-July	July	April-July	July	April-July	July	April-July	July	April-July		
Segment/Subsegment	Manufacturer	2023	2024	2023-24	2024-25	2023	2024	2023-24	2024-25	2023	2024	2023-24	2024-25
Two Wheelers													
A: Scooters													
	Ather Energy Pvt. Ltd	7,973	11,097	33,939	36,563	8,062	11,088	34,680	34,904	-	40	-	80
	Bajaj Auto Ltd	5,659	24,498	27,117	71,171	4,528	26,314	25,362	70,168	-	-	74	2
	Chetak Technology Ltd	114	-	609	-	600	-	916	-	-	-	-	-
	Hero MotoCorp Ltd	24,822	29,672	1,11,009	1,18,648	26,635	27,163	1,11,127	1,12,552	4,083	2,721	9,525	11,532
	Honda Motorcycle & Scooter India Pvt Ltd	1,78,176	3,00,191	8,02,079	11,43,177	1,64,172	2,29,076	7,53,572	10,23,911	16,662	28,077	61,933	1,08,939
	India Yamaha Motor Pvt Ltd	31,310	34,492	96,180	1,23,802	28,723	26,290	86,197	1,01,897	2,412	5,446	10,168	22,040
	Okinawa Autotech Pvt. Ltd	328	134	877	243	3,056	40	3,709	132	-	-	-	-
	Piaggio Vehicles Pvt Ltd	4,519	3,008	17,954	16,362	2,988	2,396	11,912	10,900	1,718	1,072	6,197	5,890
	Suzuki Motorcycle India Pvt Ltd	85,934	1,03,616	3,01,791	3,64,949	76,996	98,376	2,66,571	3,44,840	10,893	5,574	43,814	18,643
	TVS Motor Company Ltd	1,25,152	1,48,040	4,79,740	5,72,094	1,12,880	1,32,899	4,32,949	5,19,532	9,061	7,096	39,008	38,880
	Total A: Scooters	4,63,987	6,54,748	18,71,295	24,47,009	4,28,640	5,53,642	17,92,995	22,18,636	44,829	50,026	1,70,719	2,06,006
B: Motorcycles													
	Bajaj Auto Ltd	2,74,427	2,83,363	11,23,966	11,65,358	1,36,862	1,42,533	6,58,643	6,81,176	1,26,850	1,28,694	4,73,175	4,97,112
	Hero MotoCorp Ltd	3,62,329	3,93,424	15,96,030	18,13,279	3,44,569	3,20,472	15,77,327	17,19,145	16,023	20,018	45,905	62,199
	Honda Motorcycle & Scooter India Pvt Ltd	1,59,180	2,40,694	5,55,643	9,09,451	1,46,700	2,10,042	5,09,490	8,29,439	10,781	15,905	41,554	73,603
	India Kawasaki Motors Pvt Ltd	333	329	998	932	337	254	1,455	1,321	-	-	-	-
	India Yamaha Motor Pvt Ltd	48,828	51,850	1,99,189	2,09,955	33,161	29,548	1,40,764	1,39,732	11,328	14,220	51,678	57,042
	Piaggio Vehicles Pvt Ltd	-	1,484	-	5,197	-	452	-	1,383	-	-	1,120	-
	Royal-Enfield (Unit of Eicher Motors)	83,515	92,200	3,19,273	3,36,319	66,062	61,208	2,73,233	2,65,894	7,055	6,057	27,590	28,278
	Suzuki Motorcycle India Pvt Ltd	15,860	16,087	59,723	57,484	3,313	2,226	11,096	7,147	16,634	10,538	47,139	45,460
	Triumph Motorcycles India Pvt Ltd	37	31	135	133	60	66	255	411	-	-	-	-
	TVS Motor Company Ltd	1,63,243	1,70,441	6,33,860	6,96,343	86,142	83,788	3,82,291	4,02,763	67,800	77,286	2,34,472	2,72,749
	Total B: Motorcycles	11,07,752	12,49,903	44,88,817	51,94,451	8,50,489	35,54,554	40,48,411	46,42,411	2,56,471	2,73,838	9,21,513	10,40,226
C: Mopeds													
	TVS Motor Company Ltd	36,675	43,572	1,46,744	1,65,949	36,208	37,563	1,41,469	1,60,278	216	1,044	600	1,824
	Total C: Mopeds	36,675	43,572	1,46,744	1,65,949	36,208	37,563	1,41,469	1,60,278	216	1,044	600	1,824
	Total Two Wheelers	16,08,414	19,48,223	65,06,856	78,07,409	12,82,054	14,41,694	54,23,018	64,27,325	3,01,516	3,24,908	10,92,832	12,48,056
Quadricycle													
	Bajaj Auto Ltd	356	556	1,464	2,699	118	19	281	98	252	720	1,244	2,634
	Total Quadricycle	356	556	1,464	2,699	118	19	281	98	252	720	1,244	2,634
	Grand Total	20,87,206	24,37,138	83,37,506	97,35,722	16,41,103	17,97,571	69,23,305	79,74,368	3,88,134	4,14,631	14,05,958	15,91,457
Society of Indian Automobile Manufacturers (14/08/2024)													

SIAM													
Sub-segment & Company wise Production, Domestic Sales & Exports Report for the month of July 2024 and Cumulative for April-July 2024													
												Report IV	
												(Number of Vehicles)	
Category	Production	Domestic Sales				Exports							
		July	April-July	July	April-July	July	April-July	July	April-July	July	April-July		
Segment/Subsegment	Manufacturer	2023	2024	2023-24	2024-25	2023	2024	2023-24	2024-25	2023	2024	2023-24	2024-25
Passenger Vehicles													
A: Passenger Cars - Upto 5 Seats													
	Micro - Seats upto-4, Length Normally <3000 mm, Body Style-Hatchback, Engine Displacement Normally upto 0.8 Litre (SUV/MG Motor India Pvt Ltd (Comet EV))	NA	NA	3,652	NA	NA	NA	1,914	NA	-	-	-	-
	Total Micro	-	-	3,652	-	-	-	1,914	-	-	-	-	-
	Mini - Seats upto-5, Length Normally <3000 mm, Body Style-Hatchback, Engine Displacement Normally upto 1.0 Litre												
	Maruti Suzuki India Ltd (Ato, Spresso)	19,858	15,895	72,122	53,508	9,590	9,960	48,900	40,778	4,196	2,267	15,330	8,812
	Peraraj India Pvt Ltd (Kard)	1,088	2,007	4,520	4,517	762	955	3,900	2,888	445	40	1,740	905
	Total Mini	20,926	17,702	76,642	58,025	10,352	10,915	52,800	43,666	4,641	2,307	17,070	9,717
	Compact - Seats upto-5, Length Normally between 3000 - 4000 mm, Body Style-Sedan/Estate/Hatch/Notchback, Engine Displacement Normally upto 1.4 Litre												
	Honda Cars India Ltd (Amaze)	3,779	2,549	13,380	7,590	3,368	2,327	13,509	8,132	171	-	365	270
	Hyundai Motor India Ltd (Aura Grand/10.2D/Acent)	24,257	25,894	92,326	84,712	14,652	14,916	67,804	58,950	8,297	7,624	26,323	28,543
	Maruti Suzuki India Ltd (CEM Model# Salvo/Ceenu/Dor)	90,853	79,852	3,44,718	3,10,207	67,102	58,892	2,77,907	2,47,698	11,692	6,454	48,381	34,175
	Tata Motors Ltd (Altoz, Tigo, Tigor)	NA	NA	50,413	40,938	NA	NA	51,226	37,578	NA	NA	57	575
	Toyota Kirloskar Motor Pvt Ltd (Glanza)	-	-	-	-	-	-	4,932	4,836	17,201	17,351	-	-
	Total Compact	1,18,839	1,07,814	5,00,841	4,43,446	90,242	80,461	4,27,897	3,70,491	20,420	14,078	75,916	63,953
	Mid-Size - Seats upto-5, Length Normally between 4200 - 4500 mm, Body Style-Sedan/Estate/Hatch/Notchback, Engine Displacement Normally upto 1.6 Litre												
	Honda Cars India Ltd (City)	2,791	1,770	11,180	7,380	1,478	957	6,408	3,694	941	268	5,549	7,348
	Hyundai Motor India Ltd (Verna)	8,766	6,281	30,119	24,500	2,859	1,420	14,547	5,796	5,108	4,673	14,716	16,635
	Maruti Suzuki India Ltd (Ciaz)	3,882	1,910	9,474	6,139	1,348	603	5,101	2,772	1,011	830	2,503	2,769
	Nissan Motor India Pvt Ltd (Sunny)	3,871	6,039	8,886	15,412	-	-	-	-	3,613	4,334	8,494	13,500
	Volkswagen India Pvt Ltd (Virtus)	5,582	6,654	18,433	24,920	1,737	1,766	6,661	6,215	2,902	6,684	9,063	18,541
	Total Mid-Size	24,712	22,834	77,812	78,451	4,741	4,746	32,717	18,477	13,575	16,798	40,325	60,789
	Executive - Seats upto-5, Length Normally between 4500 - 4700 mm, Body Style-Sedan/Estate/Notchback, Engine Displacement Normally upto 2 Litre												
	Shoosha India Pvt Ltd (Savia)	2,469	1,680	8,680	4,659	1,654	793	6,574	4,814	-	-	9	10
	Total Executive	2,469	1,680	8,680	4,659	1,654	793	6,574	4,814	-	-	9	10
	Premium - Seats upto-5, Length Normally between 4700 - 5000 mm, Body Style-Sedan/Estate, Engine Displacement Normally upto 3 Litre												
	Shoosha India Pvt Ltd (Super)	-	-	-	-	-	-	131	18	-	-	-	-
	Toyota Kirloskar Motor Pvt Ltd (Camm)	195	140	622	568	190	126	579	570	-	-	-	-
	Total Premium	195	140	622	568	190	126	710	588	-	-	-	-
	Luxury - Seats upto-5, Length Normally Over 5000 mm, Body Style-Sedan/Estate, Engine Displacement Normally upto 5 Litre												
	Hyundai Motor India Ltd (Other)	-	-	-	-	-	-	1	1	-	-	-	-
	Total Luxury	-	-	-	-	-	-	1	1	-	-	-	-
	Total Passenger Cars	1,87,138	1,49,410	6,87,699	5,85,138	1,08,859	96,652	5,23,992	4,37,945	38,636	33,194	1,33,420	1,34,079
City cumulative data is available for Apr-June													
NA=Not Available													
#Only production volume of OEM Model is reported by Maruti Suzuki India Limited													

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