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Vol. 24 No. 04

April 2025

Registered-RNI No. MAHENG/2002/7908

[www.metalworld.co.in](http://www.metalworld.co.in)



■ **India Has the Complete Ecosystem to Scale Technological Solutions**  
Shyamal Shah  
Managing Partner Ellipsis Infotech



- **Digitising the Foundry Floor : A Roadmap to Smart Manufacturing**
- **Hindalco Delivers Record Financial Performance in FY25**
- **Green Galvanize 2025**



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## D. A. Chandekar Editor

*Dear Readers,*

The Indian auto and auto components industry is shifting gears, driven by a growing demand for technologically advanced products. As the sector continues to export to numerous countries, including developed nations, the recent fluid situation in the US market has prompted a strategic shift towards exploring alternative markets. To remain competitive and capitalize on emerging opportunities, technological upgradation is imperative for Indian auto component manufacturers. The decisive role of technology in various industries, including defense operations like Operation Sindoor, underscores the importance of embracing innovation. The auto component industry is no exception, where Industry 4.0 combined with artificial intelligence (AI) is being developed to enhance efficiency, quality, and productivity. As the industry looks to the future, it is clear that technological advancements will play a crucial role in determining its success. To take on the world market, Indian auto component manufacturers must invest in research and development, adopt cutting-edge technologies, and focus on producing high-quality products that meet global standards. This will not only enable them to compete with international players but also position them as leaders in the global auto component market. The Indian government's initiatives to promote the automotive sector, such as the Automotive Mission Plan 2026, are expected to drive growth and investment in the industry.

However, it is essential for manufacturers to stay ahead of the curve by embracing technological advancements and adapting to changing market dynamics. As the industry navigates the complexities of global trade and technological innovation, it is crucial to develop strategies that promote sustainability, efficiency, and competitiveness. This includes investing in digital transformation, adopting Industry 4.0 technologies, and fostering partnerships with global players. The future of the Indian auto component industry looks promising, with opportunities emerging in electric vehicles, autonomous driving, and connected car technologies. To capitalize on these trends, manufacturers must be proactive in adopting new technologies and developing innovative products that meet the evolving needs of the global automotive sector. In conclusion, the Indian auto component industry is at a crossroads, with technological advancements and global market dynamics shaping its future. By embracing innovation, investing in research and development, and adopting cutting-edge technologies, Indian manufacturers can position themselves for success in the global market. As the industry looks to the future, it is clear that technological advancements will play a decisive role in determining its trajectory. With the right strategies and investments, the Indian auto component industry can rev up its growth engine and become a major player in the global automotive sector. By embracing technological advancements and adapting to changing market dynamics, Indian auto component manufacturers can stay ahead of the curve and capitalize on emerging opportunities in the global market. The auto component industry's growth will be driven by its ability to innovate, adapt, and evolve with the changing needs of the global automotive sector. With a focus on technological upgradation and strategic planning, Indian manufacturers can navigate the complexities of the global market and emerge as leaders in the industry, driving growth and innovation in the years to come.

*Write your comments*

**:<https://metalworldddac.wordpress.com>**



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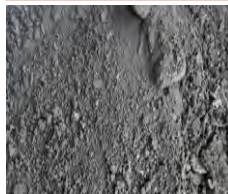
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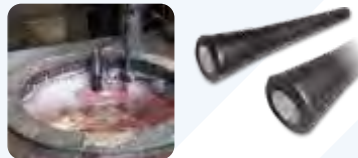
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# India Has the Complete Ecosystem to Scale Technological Solutions

**Shyamal Shah**  
Managing Partner  
Ellipsis Infotech



Mr. Shyamal Shah is an accomplished business development professional with a Master of Science degree in Manufacturing Systems Engineering & Management (specializing in Automation) from California State University, Northridge (USA), and a Bachelor's in Mechatronics Engineering. In addition to his expertise in design, automation, and IT, he also has valuable hands-on experience in the foundry industry. Being the son of a foundryman and having spent several years working in a foundry himself, he identified a significant gap in the availability of specialized software solutions for the foundry sector. This insight led to the establishment of Ellipsis Infotech, a company dedicated to developing software tailored specifically for the Foundry and Metal Forming Industries. Currently, the company offers two key software products for the metal casting industry: ICAST ERP and OPTIMIX-ALLOY. ICAST ERP is a comprehensive enterprise resource planning solution designed exclusively for the metal industry, while OPTIMIX-ALLOY is a powerful tool that optimizes charge mix recipes using a linear programming algorithm to calculate the most cost-effective melt recipe. This software suite, known as Optimix: Alloy, supports full digitalization of melt shop operations with features such as LiveMonitor (real-time display on the melt shop floor), mobile data entry, melt scheduling, and more.

D.A.Chandekar, Editor & CEO of Metalworld magazine had an exclusive interaction with M.M. Umadi Managing Director of SIPRA Engineers Pvt. Ltd., to get insights of the current state of digital adoption in Indian foundries, and where does ELLIPSIS INFOTECH position itself within this landscape, In what ways is ELLIPSIS INFOTECH integrating emerging technologies like AI, IoT, or predictive analytics into its software solutions etc.

**1. How would you describe the current state of digital adoption in Indian foundries, and where does ELLIPSIS INFOTECH position itself within this landscape?**

Digital Adoption in Indian Foundries: A Slow but Steady Transformation



The Indian metal casting industry is at the nascent stage of digital adoption, with only 10-15% of foundries having implemented full-fledged, scalable ERP systems. While awareness of digitalisation is present, the industry's investment priorities still lean towards technological equipment upgrades rather than digital transformation. One of the key reasons for this slow adoption is the nature of the Indian foundry sector—over 70% of foundries are small-scale, family-run businesses. These businesses often face challenges in capital investment, making it difficult to prioritise digital tools over essential production equipment. Many still rely on legacy systems, which, while functional, limit efficiency, scalability, and data-driven decision-making. Despite these challenges, the industry is gradually recognizing the importance of digitalization. This transformation enables users to achieve capabilities that would be impossible otherwise, such as accessing data at their fingertips, tracking inventory and work-in-progress (WIP) in real-time, effective scheduling, maintaining quality records for traceability, and retrieving them with a single click. Additionally, automating email and notification work flows is possible. Users today understand that data is the new oil, and without it, they cannot take tangible actions, therefore losing out on competition.





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## Face to Face

Therefore, even small-scale foundries have started exploring low-cost digitalisation solutions to enhance efficiency gradually rather than directly implementing large-scale ERP systems. Tools such as recipe optimisation software for melt shops like OPTIMIX: ALLOY, intelligent payroll solutions that can integrate directly with biometric systems, AI-enabled tools to monitor sand quality, and IoT solutions to improve power consumption and reduce carbon footprints are becoming increasingly relevant.



The future of digital adoption in Indian foundries will likely depend on industry-wide awareness programs, government incentives, and the availability of affordable digital solutions tailored to small-scale operations. Though the beginning was slow, the potential for transformation is immense, and digitalisation has started becoming a necessity rather than an option for sustainable growth in the sector. How does Ellipsis Infotech position itself within the industry landscape?

Ellipsis Infotech's mission is unequivocal. We stand as India's first and only technology firm devoted solely to digitalisation solutions within the metal manufacturing industry sector. The journey began with ICAST ERP, a tailored solution for the Indian metal casting industry. Recognising a key challenge—many small foundries lacked a number of qualified staff despite their

willingness to invest in digitalisation—ELLIPSIS INFOTECH designed a modular and scalable ERP system. This allows foundries to start with a basic package manageable by just 3-4 users and gradually expand with additional modules as their business grows, all without needing to replace the ERP. Moreover, ICAST ERP is a ready-to-use solution for the metal casters. This means there's no need for costly and time-consuming customisations, which cuts costs by over 50% and reduces the implementation timeframe by more than two-thirds compared to other generic ERPs. Moreover, we recognised early on that Indian users need fast and effective support. Unlike traditional ERP providers with complicated ticketing systems, we offer direct assistance, just a phone call away.

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Unlike traditional ERP providers with complicated ticketing systems, we offer direct assistance, just a phone call away. As a result, many Indian Metal Casters have opted for ICAST ERP over costly alternatives such as SAP, TCS, and RGU. FRP, etc, due to its low cost, immediate and effective local support infrastructure, user-friendly and functionally rich design, and a scalable "scale-as-you-grow" model that facilitates gradual digitalisation without disruption.

### **Beyond ERP: A Full-Spectrum Digitalisation Approach**

While ICAST ERP remains a core offering, ELLIPSIS INFOTECH has diversified its solutions to cover multiple aspects of digitalisation, including: Real-time data entry via mobile applications, enabling seamless operations from anywhere. Department-specific digital solutions, such as OPTIMIX: ALLOY for Melt shop Department, Payroll Module to overcome unique challenges of metal casting industry, etc. Integration with IoT devices and third-party software, including: Spectrometers for precise alloy composition analysis. Biometric systems for workforce management. ERP integrations with platforms like SAP and NetSuite, ensuring smooth data flow across systems.

### **Positioning as a Complete Digitalisation Partner**

ELLIPSIS INFOTECH is not just offering software—it is enabling a digital ecosystem for Indian foundries. With multiple IoT solution partners, the company is helping foundries connect machines, automate processes, and leverage data-driven insights for better efficiency and decision-making. With growing digital adoption in the Indian metal casting industry,



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## Face to Face

ELLIPSIS INFOTECH is positioning itself as the obvious choice for foundries looking for affordable, effective, and scalable solutions. As the industry evolves, the company's user-centric approach, deep industry expertise, and commitment to practical digitalisation will continue to drive its expansion and leadership in the sector.

### **2. In what ways is ELLIPSIS INFOTECH integrating emerging technologies like AI, IoT, or predictive analytics into its software solutions? '**

Although we are at a beginning stage, we have slowly started adopting and integrating AI into our products. We are in the early stages of incorporating artificial intelligence (AI) into our products. A significant step we've taken is integrating a GPT-based support system to assist our users, which is currently being implemented in our software. There can be many other places where AI can help us. for example, - Automated Invoice Processing. An AI feature can be developed to extract and process supplier invoice data using AI-driven OCR (Optical Character Recognition).

We have teamed up with several partners to better serve our customers in the Internet of Things (IoT) sector. In the metal casting industry, companies are utilising IoT technology to automatically gather data from their machines. For instance, we can track power usage and operating times of furnaces, as well as collect information from quality control equipment about sand properties and the physical properties, such as hardness, etc, of castings directly from these machines. One of the most popular applications of IoT in the metal casting industry is in machine shops.

Businesses are already monitoring key performance indicators such as Overall Equipment Effectiveness (OEE), comparing standard versus actual cycle times for each item at various stages of production, monitoring downtime, and seeking ways to boost overall efficiency. This technology helps companies optimise their operations and improve productivity.

### **3. What challenges and opportunities do you foresee in transitioning traditional foundry operations to cloud-based ERP systems?**



Transitioning traditional foundry operations to cloud-based ERP systems presents both challenges and opportunities, particularly given the niche market, cost concerns, and user adoption barriers. Here's a structured analysis based on your thoughts:

#### **Challenges in Transitioning to Cloud-Based ERP for Foundries** **High Cost of Transition**

Most legacyERP systems in foundries are desktop-based. Also, metal casting industry is a very small market, and foundry ERP vendors already operate on tight margins. Plus, completely changing the technology to make the system cloud-compatible will be costly. I believe their existing clientele may not be willing to pay for these upgrades.

As a result, while modernisation is inevitable, vendors might have to absorb the costs themselves, which is going to slow down the process due to uncertain return on investment (ROI).

#### **Subscription-Based SaaS Model Resistance**

Cloud-based ERP solutions typically follow a SaaS (Software-as-a-Service) model, meaning recurring subscription fees instead of a one-time purchase. Foundry businesses, accustomed to traditional licensing models, will hesitate to commit to ongoing costs. Vendors may struggle to justify the value proposition of a subscription-based model to cost-conscious customers.

#### **Data Security Concerns**

When we look at different industries, it's clear that metal casting businesses, both users and owners, tend to embrace digital transformation a bit later than others. As a result, their mindsets may take a little longer to adapt to these changes. Due to this, many foundry owners worry about data security risks when storing sensitive business information on the cloud. Fear of cyber threats, unauthorised access, and data breaches can deter adoption. Convincing users that cloud providers offer better security than on-premise solutions remains a challenge.

#### **Opportunities in Cloud-Based ERP for Foundries** **Cost Efficiency in Upfront Investment**

Cloud infrastructure reduces the need for significant upfront investments in hardware, maintenance, and IT staff, allowing foundries to allocate resources more effectively.

#### **Accessibility**

Cloud-based systems allow users to access data and applications from anywhere, facilitating remote work and enhancing collaboration among teams, especially in a geographically diverse industry.



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## Face to Face

without additional costs or downtime.

### **Data Backup, Security, and Disaster Recovery**

Leading cloud providers offer robust security measures and backup solutions, often superior to what many small and medium-sized foundries can afford on-premise, helping protect sensitive information.

Cloud solutions typically include backup and disaster recovery services, ensuring that critical data is secure and recoverable in the event of a system failure or disaster.

### **Automatic Updates**

Cloud providers manage software updates and security patches automatically, ensuring that foundries always have access to the latest features

### **Integration Capabilities**

Cloud platforms facilitate easier integration with other digital tools and IoT devices, promoting comprehensive digital transformation across operations.

### **Enhanced Security & Compliance**

Leading cloud providers offer advanced security measures, including encryption, multi-factor authentication, VAPT and SOC compliance, and regular audits.

### **Gradual Transition Instead of Full Replacement**

A modular approach- One Department at a time, allows businesses to adopt cloud features incrementally, reducing upfront costs.

Many cloud services operate on a 'Pay-As-You-Go' model subscription basis, which allows foundries to only pay for the resources they use, making budgeting more manageable.

### **4. What upcoming features, products, or technologies is ELLIPSIS INFOTECH planning to implement to stay ahead in the ERP market?**

At Ellipsis, we are actively embracing cloud technology and web-based applications, ensuring a gradual transition for our users. Our approach allows foundries to seamlessly shift from traditional systems to modern, connected solutions without disrupting their operations.

#### **Integration with IoT & Leading ERPs**

We have made ICAST ERP entirely compatible with IoT devices, smart equipment, and third-party software to minimize user intervention at all levels. Our skill in integrating with prominent ERP systems, including SAP and Oracle NetSuite, has facilitated a seamless data exchange between applications. Importantly, we have completed projects with industry leaders like Kirloskar Brothers Limited and PTC Industries LTD, guaranteeing smooth interoperability between their systems and ICAST ERP.

#### **Mobile-Enabled Shop Floor Entries**

Recognising the need for real-time data capture, we have introduced mobile application entry features. This allows users to record transactions directly from the shop floor, improving efficiency and reducing manual data entry errors.

#### **Enhanced Communication & Real-Time Visibility**

To improve customer and supplier engagement, we have integrated third-party applications such as WhatsApp for notifications, email schedulers, and real-time alerts. Additionally, we have developed a dedicated portal where foundries using ICAST ERP can bring their clients and suppliers

onboard, providing real-time visibility and data access. This transparency fosters trust and confidence among stakeholders.

### **Expanding ERP Capabilities**

We are continuously enhancing ICAST ERP by adding new modules such as Payroll, Business Intelligence (BI) tools, and CRM, making it a comprehensive suite tailored to the specific needs of foundries. All our modules are designed after rigorously studying the needs of metal casters and are preconfigured for their requirements. This makes these add-ons plug-and-play modules in the industry.

At Ellipsis, our commitment to innovation and adaptability ensures that ICAST ERP remains ahead of the market. By focusing on cloud technology, IoT integration, mobile accessibility, real-time communication, and expanding ERP functionalities, we are empowering foundries with cutting-edge solutions that drive efficiency and growth.



### **5. How do you see the state of the indian foundry industry?**

The Indian Foundry Industry plays a vital role in the manufacturing ecosystem, particularly serving sectors such as automotive, railways, agriculture, and infrastructure. The Indian Foundry Industry is undergoing a significant transformation, shaped by domestic market advantages, regulatory pressures,





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## Face to Face

global shifts, and industry consolidation. Here's an in-depth look at its current state.

### Market Size and Growth

We all know that India is the second-largest producer of castings globally, with an annual output of 15.16 million metric tonnes. India also has a strong domestic demand for castings. The Indian Foundry Market is expected to grow from USD 25.57 billion in 2025 to USD 42.61 billion by 2030, reflecting a CAGR of 11.13%. (1)

### Challenges Facing the Industry

**The sector is grappling with several challenges, including:**

#### Environmental Regulations:

Stricter norms increase compliance costs and necessitate investment in cleaner technologies.

#### Raw Material Price Volatility:

Fluctuations in iron and steel prices impact profitability.

**Skilled Labour Shortage:** There is a significant lack of trained professionals for advanced manufacturing processes.

**High Energy Costs:** Foundries face concerns over substantial power consumption.

**Technology Adoption:** Many foundries are slow to implement automation and advanced technologies like IoT and AI.

### Opportunities and Future Trends

#### Government Initiatives:

Programs such as 'Make in India' are stimulating demand and investment and a push towards initiatives like Digital India, AI for Manufacturing, and Industry 4.0 adoption programs is driving smart factory solutions at scale.

#### Modernisation and Automation:

Foundries are gradually shifting to induction melting and other digital and optimization solutions to improve efficiency

**Export Potential:** India's competitive cost structure positions it as a preferred exporter of castings.

**Emerging Sectors:** Growth in electric vehicles, high-speed trains, defence, and renewable energy is creating demand for light weight and high-tech cast components.

### Industry Consolidation & Barriers to Entry

The foundry industry is undergoing consolidation, with smaller firms either closing or being acquired by larger entities. Major players are leveraging strategies like mergers, partnerships, and geographical expansion to enhance market competitiveness. For instance, the partnership between Brakes India and the Volvo Group aims to produce green iron castings to mitigate carbon footprints. The barrier to entry is becoming stronger, as new players require large capital investments to compete with established foundries

### Technological Competitive Edge

India has a complete ecosystem to develop and adopt new technological solutions, especially in digitalisation and AI-driven automation.

### Affordable Software

**Development:** A large pool of tech talent allows for cost-effective implementation of customised solutions.

**Fast Adoption Cycle:** Indian industries have a proven track record of quickly adapting to new technologies, from cloud computing to AI-driven automation, accelerating digital transformation in foundries.

### Government and Private Sector

**Support:** Initiatives like Digital India and AI for Manufacturing are driving the adoption of smart factory solutions.

### Scalability & Customisation –

Unlike smaller industrial economies, India's large-scale tech ecosystem allows foundries to scale digital

solutions based on their needs, making automation and AI adoption more accessible. *In conclusion, while the Indian Foundry Industry faces significant challenges, it also possesses remarkable growth potential through modernisation, government support, and technological advancements.*

### 6. Do your product and service have export potential? How are you tapping it?

Ellipsis Infotech offers more than one product and service that cater to various needs. One of our flagship offerings, ICAST ERP, is a comprehensive solution designed to meet the stringent requirements of government compliance and tax regulations for Indian metal casters. However, due to its complexity and the necessity for localized cultural and language settings, expanding ICAST ERP into new markets can be a challenging process.

Nonetheless, we recognise that the journey doesn't stop there. Users of large-scale enterprise applications like ICAST ERP require robust local support and training to ensure successful implementation and usage. While the ICAST ERP may take some time to adapt for international markets, we have modular products that are ready for export and have already gained traction in global markets. One such product is Optimix: Alloy, which offers a streamlined experience that doesn't require extensive training. It can be easily managed online, making it accessible for clients around the world. We are excited to share that we already have several satisfied overseas clients utilising Optimix: Alloy. With a keen focus on our modular offerings, we're optimistic about the potential for growth and success in international markets!







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## Digitising the Foundry Floor : A Roadmap to Smart Manufacturing

India is one of the world's largest casting producers, with foundries relying heavily on laborers. Despite the availability of Industry 4.0 technologies and IoT devices, Indian foundries have largely yet not adopted them. One of the major challenges is, to replace intensive labor operations with automation, robots, sensors, etc., which requires huge investments, skill, and infrastructure.

Can Indian foundries afford to wait for the Industry 4.0 adoption? Probably not. To become more competitive, reduce rejection, and deliver quality castings, Indian labor-intensive foundries need an indigenous alternative solution to IoT devices.

This has inspired us at Vezapp Solutions LLP to take on the task of developing indigenous solutions for India's labor-intensive foundries. Some developers have tried in the past, but the limitations of server-based solutions, as well as the ease of use for semi-skilled laborers on the shop floor, have not proven to be successful.

With 439 million smartphone users, India has the world's second-largest smartphone population.

These smart mobile devices can revolutionize labor-intensive foundry processes, eliminate large junk of papers, and real-time data collection from the shop floor without any IoT device. Remember that a smartphone with internet access is a free IoT device in the hands of your employees.

VEZAPP has developed mobile apps for each foundry process and each data entry point to overcome the larger challenge of managing daily manual logbooks and manual records. **"Record Data In A Smart Phone, Wherever And Whenever It Is Generated,"** is our MANTRA for real-time shop floor data collection of manual records using mobile apps. This will eliminate all Be it charge mix, melting, alloying, and pouring temperature, treatments quantity, and time, these all are vital parameters that affect the quality of the casting. If these parameters can be directly entered using smartphones, this may transform the Indian foundries.



**Mr. Bhushan Bhatt**  
**Vezapp Solutions LLP**

data redundancies, manual errors, missing records. On the other side, this will improve accountability by empowering HODs to take proactive rather than reactive steps, through mobile alerts if any shop floor data are out of specification, without deploying any IoT devices.

This cloud-based solution allows real-time synchronization with various PLC/SCADA/IoT systems via API. Alternatively, machine data can be uploaded in

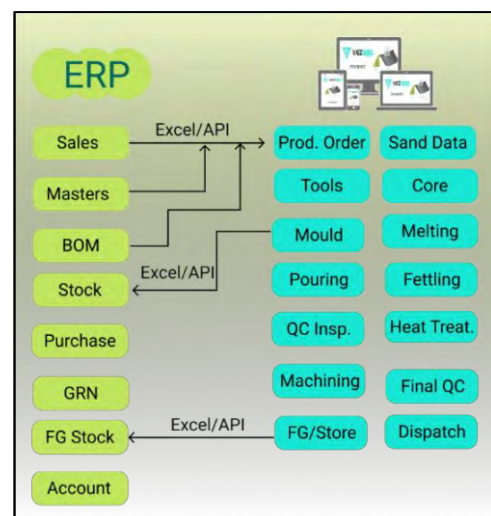
### I. INTRODUCTION

Being a labor-intensive foundry, it's not an excuse anymore to meet the customer's expectations of an end-to-end foundry process traceability. This implies that foundries will need to leverage a mix of technologies to collect data directly from IoT, PLC, and SCADA wherever possible. On the other side, for human-dependent processes where data is manually recorded, shop floor users should use smartphones for real-time data entry.

Is ERP is enough to manage the Foundry or not?

In my opinion it is not. Because most of the standard ERP which are generic in nature, is meant for the Admin building, monetary flow and overview of consumables. Many technical parameters you need for monitoring aren't included or recorded in most ERP system or not able to fetch when needed. As a result, most foundries keep track of their data on paper, in logbooks, or excel spreadsheets. Hence it is vital to digitize these shop floor activities and use this historical data for process improvisation, get real-time alerts for preventive corrections even for manual data entry points.

Hence foundry needs two separate system namely ERP for the Admin building and their requirement and other system like Vezapp – for the Foundry shop floor data collection, however ERP and Vezapp needs to integrate to avoid data redundancies. We recommend to use Cloud based ERP for the ease of integration between Vezapp and ERP.



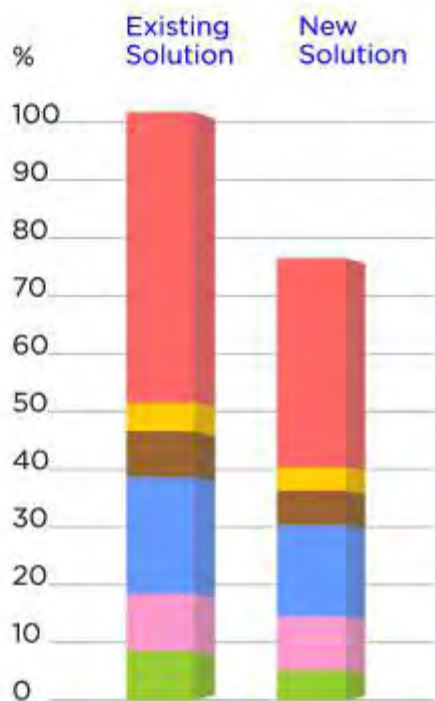


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**Table 1: Current foundry practices & challenges v/s Vezapp Smart mobile/Web Apps**

| Department  | Current Foundry Practice & Challenges  | Vezapp – Smart Mobile/Web Application  |
|---|--|--|
| <b>Master Data</b> <ul style="list-style-type: none"> <li>Part Details</li> <li>Drawings</li> <li>Tools (Core, Patterns)</li> <li>Material Specifications</li> <li>Required quality / SOP</li> </ul>  | <ul style="list-style-type: none"> <li>Master data is available in multiple excel files or partly in an ERP system.</li> <li>Risks to data security and confidentiality</li> <li>Managing/Tracking excel is challenging.</li> <li>Difficult to keep track of folder, files locations of drawings, part images</li> </ul>   | <ul style="list-style-type: none"> <li>Master Apps for the customer, sequence operation, supplier, parts, tool, gauges, machines, etc.</li> <li>Apps can be accessed only by authorization</li> <li>Access data change history</li> <li>2D Drawings, CAD Images, simulation can be linked</li> <li>Actual part photos, SOP, can be attached</li> </ul>   |
| <b>Sand Data</b> <ul style="list-style-type: none"> <li>Sand mixer actual recipe</li> <li>Prepared/return sand data</li> <li>Core sand data</li> <li>Sand test data</li> </ul>  | <ul style="list-style-type: none"> <li>Sand mixer data is accessible in the PLC/SCADA system, but cannot be used to make decisions or take corrective actions.</li> <li>For the sand batch summary, consumables, and manual efforts to prepare COPQ reports, a manual log sheet is maintained.</li> <li>Difficult to link sand data with moulding batch</li> <li>Historical data of sand properties based on weather/months</li> </ul>   | <ul style="list-style-type: none"> <li>Get real-time data by uploading or integrating with the sand mixer's PLC via API.</li> <li>Good, bad sand batches and COPQ summary</li> <li>Can link sand batch with moulding for traceability</li> <li>Sand test results can be recorded in mobile apps, and alerts can be sent if the results are out of specification e.g. Clay, GCC, GCS, Compatibility, etc.</li> <li>COPQ dashboard - losses of Bentonite, Lustron, Hardener, Resin, and other reports</li> </ul>   |
| <b>Tool &amp; Patterns</b> <ul style="list-style-type: none"> <li>Core/shell &amp; Tool patterns – cavities, cycle time, machine</li> <li>Tool Life/usage</li> <li>Tool inspection</li> <li>Tool maintenance</li> <li>Tool history</li> </ul> | <ul style="list-style-type: none"> <li>Tool related master data, cavities, cycle time, tool life maintained in excel, very tedious to maintain manually</li> <li>In Excel, the tool life or usage is manually computed/compiled.</li> <li>Tool inspection data are kept in logbooks, which may be easily changed or altered.</li> <li>Log sheets or excel spreadsheets are used to keep track of historical data of tool changes.</li> <li>Data redundancies as data recorded in log sheets and later in excel files</li> <li>Difficult to remember pending tool inspections, may leads to rejection</li> <li>Requires additional time &amp; efforts for dashboard or monitor each tool</li> </ul>             | <ul style="list-style-type: none"> <li>Tool master records all the tool-related details like tool cavities, cycle time, suitable machines, sand required</li> <li>Tool life is calculated automatically based on production reports of core/shell or mouldings</li> <li>Tool inspection from the shop floor using mobile apps to capture defined criteria vs. observed values, checklist, and pictures</li> <li>Upcoming tool inspection, periodically tool inspection and maintenance in apps</li> <li>Core box, Tool or pattern checklist, and observed values directly recorded in-app</li> <li>Supports Tool Barcode/QR code</li> <li>Email alerts in advance of upcoming due tool inspection and escalates further if not inspected</li> <li>Dashboard of tool wise, customer wise tool status, tool life, upcoming inspection</li> </ul>       |
| <b>Instruments &amp; Calibration</b> <ul style="list-style-type: none"> <li>Instruments</li> <li>Calibration reminder</li> </ul>  | <ul style="list-style-type: none"> <li>Maintaining due date on paper and excel</li> <li>Likely to miss the due dates</li> <li>Calibration certificate in local folder or server might be difficult to find</li> </ul>  | <ul style="list-style-type: none"> <li>Instrument masters and calibration plan</li> <li>A reminder of due calibration, and escalation if calibration is not completed</li> <li>All certificates and records single click away</li> </ul>   |
| <b>Core/Shell/Mould Report</b> <ul style="list-style-type: none"> <li>Production report</li> <li>Rejection &amp; reason</li> <li>Dressing, Painting</li> <li>Breakdown</li> <li>OEE</li> <li>Maintenance</li> <li>Consumables</li> </ul>      | <ul style="list-style-type: none"> <li>Moulding production report mostly on paper, not in ERP as it is not finished or semi-finished castings</li> <li>Moulding heat code manually recorded on paper and chances of human errors</li> <li>Core/Shell production reports are maintained in log sheets, excel, or ERP</li> <li>Management can't see essential production, wastages, COPQ or performance reports right away — reports take time to prepare.</li> <li>Other departments are unable to see core production status, such as delays due to breakdowns, to adjust mould or melting plan.</li> <li>Breakdown, maintenance records on log sheets</li> <li>OEE needs to be calculated manually</li> </ul> | <ul style="list-style-type: none"> <li>Replace 2-3 log sheets with one single app for Production, Rejection, OEE, Performance</li> <li>Moulding heat code and its traceability</li> <li>Tool setup approval, digital signature, images from mobile</li> <li>One Mobile/web app for all the data records of core/mould production, rejection, breakdown</li> <li>Automatic OEE calculation</li> <li>Operator and machine performance</li> <li>COPQ due to core rejections</li> <li>Production-wise/part wise core production, stock</li> <li>Alerts in the event of a failure, allowing other departments to adjust their production plans, such as Moulding and Melting.</li> <li>Maintenance Report</li> <li>Can send production data to ERP via API or Excel</li> <li>Various dashboard-related rejection, production, OEE, stock, etc.</li> </ul> |
| <b>Furnace Planning</b> <ul style="list-style-type: none"> <li>Furnace</li> <li>Grade</li> <li>Pouring plan</li> </ul>  | <ul style="list-style-type: none"> <li>Poor planning leads to delay because of melting hold, waiting for core, mould, miscommunications</li> <li>Without planning - difficult to avail segregated materials for each heat</li> </ul>   | <ul style="list-style-type: none"> <li>Furnace planning, pouring plan, required liquid melt via App</li> <li>Alerts and auto email .pdf of planning to concerned departments in well advance e.g.tool, core, mould, melt dept.</li> <li>Easy for each dept. to follow the plan and execute, compare plan v/s actual</li> </ul>   |
| <b>Charge mix</b> <ul style="list-style-type: none"> <li>Recipe</li> </ul>  | <ul style="list-style-type: none"> <li>Basic plan display on board</li> <li>Melt in charge, probably the only person who knows the charge mix and right practice</li> <li>Very difficult to replace melter, as all the know-how remains with him only</li> <li>Same grade for different products or customer may require different charge mix</li> </ul>   | <ul style="list-style-type: none"> <li>The foundry can record as many charge mix recipes and combinations they want</li> <li>Easy to learn or adopt for new metler</li> <li>Furnace v/s Charge mix v/s material grade v/s parts matrix</li> <li>No need to remember the recipe or right practice- App will indicate from master</li> </ul>   |



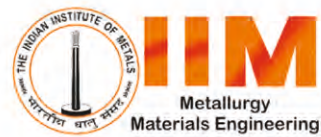
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- ◆ About 50 abstracts received
- ◆ 30+ companies confirmed
- ◆ Special session & panel discussion
- ◆ IBAAS-Cetizion Verifica ESG Awards
- ◆ Participants from 15+ countries
- ◆ Technical sessions on Bauxite, Alumina, Smelting, Downstream, Sustainability, Digitalization & Industry 4.0



## Technology

|   |  |   |
|---|--|---|
|   | <ul style="list-style-type: none"> <li>recipe or practice, difficult to remember and follow consistently</li> <li>Despite following the same charge mix recipe variation in rejection keeps varying</li> </ul>   | <ul style="list-style-type: none"> <li>Consistent charge mix recipe and right practice means consistent quality castings</li> <li>Can verify plan v/s actual charge mix used during rejection root cause or for traceability purpose</li> <li>Later AI model can be built, based on which recipe gave the good quality casting historically for a particular grade</li> </ul>   |
| <b>Melting Report</b> <ul style="list-style-type: none"> <li>Charge mix report</li> <li>Melt in charge</li> <li>Time</li> <li>Person</li> <li>Power reading</li> <li>Pouring and related data</li> </ul>  | <ul style="list-style-type: none"> <li>2-3 Logbooks to record melt code, charge materials, power consumptions, timings</li> <li>These are very vital data and parameters, but difficult to find from paper or excel when required</li> <li>ERP might be limited to BOM, not all technical parameters recorded</li> <li>Lots of data redundancies</li> <li>Additional time and efforts to prepare audit, management reports</li> <li>Pouring time, temp. in logbooks</li> </ul>                         | <ul style="list-style-type: none"> <li>Live melting report, charge used, power consumption, images of weighing charge via mobile apps</li> <li>Live timings, to avoid manipulation of heat durations,</li> <li>Traceability of melt/heat code wise charging with timings</li> <li>Spectro. coin time, temp, etc.</li> <li>Dashboard – heat, shift wise charge material</li> <li>Export consumables to ERP via Excel, API auto workflow</li> <li>Pouring related all technical data</li> </ul>   |
| <b>Pouring Report</b> <ul style="list-style-type: none"> <li>Tapping time &amp; temperature</li> <li>Liq. Metal weight</li> <li>Ladle treatment</li> <li>CE Meter reading</li> <li>Pouring time</li> <li>Temp – first, each or last box</li> <li>No of mould poured, reject</li> <li>in-charge</li> </ul> | <ul style="list-style-type: none"> <li>Data redundancies e.g. melt date, grade, furnace, etc.</li> <li>1-2 logbooks to record various data linked to pouring report</li> <li>Logbooks to excel again manual data entry</li> <li>Many technical parameters remain in paper and excel not in ERP, difficult to find when required</li> <li>Very critical parameters, but not easily available for root cause digitally</li> <li>Can only do reactive corrections not preventative corrections</li> </ul> | <ul style="list-style-type: none"> <li>All pouring related data in a single app in the sequence from tapping to end of pouring</li> <li>Can take live current time e.g. start of pouring or end of pouring time</li> <li>Pouring against planning done, in case of change in plan reason for change recorded</li> <li>Alerts in case of pouring time exceeded</li> <li>Traceability of pouring parameters wrt. melt code, moulding heat code</li> <li>Dashboard of plan v/s actual poured, required liquid metal v/s actual consumed</li> <li>Dashboard no of mould poured, rejections, liquid metal consumed, power consumed</li> <li>Export data to ERP via excel or API through auto workflow</li> </ul> |
| <b>Knock-off, Fettling, shot blasting,</b> <ul style="list-style-type: none"> <li>Daily report</li> <li>Good, rework, rejection</li> <li>COPQ</li> <li>Performance</li> </ul>   | <ul style="list-style-type: none"> <li>Logbooks for each process separately record daily production</li> <li>Difficult to see rework done by contractors, employees, or contract labors</li> <li>Loopholes in rework cost v/s actual work done by contract vendors</li> <li>Difficult to track rework to reject or rework to ok quantity</li> </ul>  | <ul style="list-style-type: none"> <li>Each app for each process</li> <li>Tracks rework quantity and its conversion to either rejection or ok</li> <li>Dashboard of performance of the contractor, rework v/s good job, costs, and payments</li> <li>COPQ – rework or rejection cost</li> <li>Operator rejection % and performance KPI of manual operations</li> </ul>  |
| <b>Machining</b> <ul style="list-style-type: none"> <li>Part-machine matrix</li> <li>Tool setup</li> <li>Production, rejection, rework</li> <li>OEE</li> <li>Operator performance</li> <li>Breakdown</li> <li>Maintenance</li> <li>IoT/PLC Interface</li> <li>Dashboard</li> </ul>                        | <ul style="list-style-type: none"> <li>Manual logbooks for each machine</li> <li>Info of part wise machine/operation sequence needs to be remembered</li> <li>Data redundancies, need to enter again from paper to excel for analysis &amp; report, OEE calculation, etc.</li> <li>Inserts life cannot be calculated automatically</li> <li>If the machine is able to export machine cycle data, it may be recorded in the server into separate log files</li> </ul>                                   | <ul style="list-style-type: none"> <li>Part wise operation sequence</li> <li>Cycle ideal time, tool setup time, other parameters from the master file</li> <li>One app to replace multiple logbooks</li> <li>Actual production time, setup will be compared with ideal/defined automatically for performance evaluation</li> <li>Inserts life calculation automatically</li> <li>Breakdown, reason, timings, alert to the maintenance department, OEE, performance</li> <li>Maintenance plan &amp; report</li> <li>Possible to interface with PLC/IoT</li> </ul>  |
| <b>QC Inspection</b> <ul style="list-style-type: none"> <li>Spectro, Tensile, Micro, Hardness, UT, RT</li> <li>Raw cast inspection</li> <li>Visual inspection</li> <li>Salvage</li> </ul>   | <ul style="list-style-type: none"> <li>Many QC data remain in software of that quality inspection provider</li> <li>Spectro reading, Tensile, hardenss again needs to copy in excel for test certificate</li> <li>Manual efforts for TC generation</li> <li>Manual logbooks and later entries to excel or ERP</li> <li>some customer specifications are difficult to remember during the inspection</li> <li>Data redundancies</li> <li>Salvage and its tracking is challenging</li> </ul>             | <ul style="list-style-type: none"> <li>Separate apps for each inspection as per the sequence e.g. Tensile, Micro, Hardness, UT, RT, Visual etc.</li> <li>Spectro integration or excel import</li> <li>Good, rework, reject – prod. order wise</li> <li>Salvage and tracking only authorized approval of salvages with evidence</li> <li>Visual inspection observed values, or pdf or image report upload</li> <li>Can compare defined v/s observed values</li> <li>Dashboard of QC inspection part, order, shift wise</li> <li>Automatic Test certificate – no extra efforts</li> </ul>   |
| <b>Maintenance</b> <ul style="list-style-type: none"> <li>Planning</li> <li>Report</li> <li>Alerts</li> <li>Dashboard</li> </ul>  | <ul style="list-style-type: none"> <li>Manual maintenance planning on paper or no planning in some cases</li> <li>Cannot verify planning v/s actual maintenance done</li> </ul>  | <ul style="list-style-type: none"> <li>Separate apps for planning &amp; actual reporting, however, both are linked</li> <li>Report against planned maintenance</li> <li>Unplanned maintenance in foundry</li> </ul>   |

Small steps taken over time may help to establish confidence in management and on the shop floor. The availability of smartphone usage skills supports the use of smartphones on the shop floor to eliminate the need for logbooks and preventative maintenance without the use of IoT.





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Younger generations are reluctant to pursue a career in the foundry because they wish to work with systems, technology, and smartphones, which are not commonly used in most foundries. Here's a chance to change this scenario,

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4) Data hosting on one of the safest cloud AWS(Amazon Web service) in the world, audited by the Government of India. Focus on foundry and not in managing server, security, and IT infrastructure

5) Internet connections are broadly available in each foundry, and their cost is quite inexpensive, making the smartphone easy to implement.

6) End-to-end traceability and improved root cause analysis of each foundry process are possible now because of a single standard platform to record all the required foundry data.

7) Foundries may save a lot of money, wastage, and rejections by using mobile notifications and taking preventative actions rather than corrective actions

VEZapp

Mould Heat-code: 21K9A5

(1) ▾

Part Code

▾

P2-A47

21K9A5

Oct 9, 2021

B2

Actual Melt Date: Oct 9, 2021

(1) ▾

Final Melt Heat Code

▾

| CLAY TESTING PROPERTIES |             |             |       |      |      |      | SAND TESTING PROPERTIES |      |      |                        |                      |              |                      |
|-------------------------|-------------|-------------|-------|------|------|------|-------------------------|------|------|------------------------|----------------------|--------------|----------------------|
| Total Clay              | Active clay | Dead Clay   | AFS   | LOI  | VM   | pH   | Compactibility          | GSS  | GCS  | Prepared Sand Moisture | Return Sand Moisture | Permeability | Wet Tensile Strength |
| 12.44                   | 9.18        | 3.26        | 51.24 | 0    | 0    | 8.6  | 36                      | 0.37 | 1.83 | 3.46                   | 1.8                  | 138          | 0                    |
| Okay                    | Okay        | Out of Spec | Okay  | Okay | Okay | Okay | Okay                    | Okay | Okay | Okay                   | Okay                 | Okay         | Out of Spec          |

| CHARGE MIX |               |          |        |              |     |          |   |   |   | MELT DETAILS |                            |                             |                       |                        |                        |               |                        |               |
|------------|---------------|----------|--------|--------------|-----|----------|---|---|---|--------------|----------------------------|-----------------------------|-----------------------|------------------------|------------------------|---------------|------------------------|---------------|
| CRCA Scrap | Silicon Scrap | HR Scrap | Boring | Pearlitic RR | Cu  | Graphite | - | - | - | Furnace No   | 1st Sampling Meter reading | Melt Time (Till 1st Sample) | 1st Bath Spectro Time | 1st Bath Spectro Temp. | Actual Melt Start Time | Melt End Time | Melt Duration (in Min) | Unit Consumed |
| 150        | 150           | 300      | 100    | 850          | 6.5 | 26       | 0 | 0 | 0 | F1           | 70                         | 14                          | 15:44                 | 1540                   | 15:33                  | 15:50         | 17                     | 99            |

| SPECTROMETER READING |                |       |        |         |         |         |         |         |    |         |    |  |
|----------------------|----------------|-------|--------|---------|---------|---------|---------|---------|----|---------|----|--|
| Spectro Type         | Furnace Number | C     | Si     | Mn      | P       | S       | Cu      | Cr      | Mo | Mg      | Ni |  |
| 1. -                 | F4             | -     | -      | -       | -       | -       | -       | -       | -  | -       | -  |  |
| 2. Bath Spectro 1    | F1             | 3.494 | 2.6715 | 0.41957 | 0.02604 | 0.01216 | 0.27459 | 0.03291 | 0  | 0.04364 | 0  |  |

| LATE ADDITION ALLOYING |                   |               |    |               |     |           |    |          |    |      |     |
|------------------------|-------------------|---------------|----|---------------|-----|-----------|----|----------|----|------|-----|
| Bath No.               | Bath Spectro Time | M1            | Q1 | M2            | Q2  | M3        | Q3 | M4       | Q4 | M5   | Q5  |
| 1. -                   | -                 | Silicon Scrap | 10 | -             | 0   | -         | 0  | -        | 0  | -    | 0   |
| 2. Bath 2              | 15:55             | Pearlitic RR  | 12 | Silicon Scrap | 1.2 | M S Scrap | 4  | Graphite | 2  | FeSi | 0.8 |

| POURIG DETAILS  |                      |                             |  |                    |                       |                      |
|-----------------|----------------------|-----------------------------|--|--------------------|-----------------------|----------------------|
| Mould Heat-code | Final Melt Heat Code | 1.Planned mould box to pour |  | Total Metal Poured | First Box Temperature | Last Box Temperature |
| 1. 21K9A5       | B2                   | 50                          |  | 1000               | 1549                  | 1544                 |

| OBSERVED HARDNESS |                  | MICRO RESULT          | LUG REPORT      |                |                 |                   |                           |        |
|-------------------|------------------|-----------------------|-----------------|----------------|-----------------|-------------------|---------------------------|--------|
| Minimum Hardness  | Maximum Hardness | Observed Micro Status | Mould Heat-code | Carbide Actual | Pearlite Actual | Nodularity Actual | Nodule Count (In Numbers) | Result |
| 406               | 926              | Not OK                | 21K9A5          | 0              | 25              | 90.67             | 425                       | Not OK |



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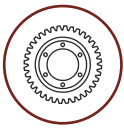


SUPPORTING MEDIA



**For Booking Contact**

**Mr. Ritesh Shah | 9328249374 | [sales@castingsandfoundries.com](mailto:sales@castingsandfoundries.com)**



## Hindalco Delivers Record Financial Performance in FY25



Hindalco Industries Ltd., the flagship metals company of the Aditya Birla Group, has reported its best-ever financial results for both Q4 and the full fiscal year ending March 31, 2025. Strong performance across its Aluminium and Copper businesses, cost efficiency, and favourable market conditions propelled the company to new heights in revenue, EBITDA, and profit.

### FY25 Full-Year Highlights

Revenue reached an all-time high of ₹2,38,496 crore, a 10% increase from FY24. Consolidated EBITDA surged 38% to ₹35,496 crore. Profit After Tax (PAT) jumped 58% to ₹16,002 crore. Aluminium Upstream EBITDA rose an impressive 78% to ₹16,262 crore, while Downstream EBITDA grew 16% to ₹633 crore. Copper segment also hit a record EBITDA of ₹3,025 crore, a 16% increase. Hindalco's global subsidiary Novelis recorded a Net Income of \$683 million, up 14%. Debt levels improved, with Net Debt to EBITDA ratio improving to 1.06x, down from 1.21x a year ago. The Board proposed a dividend of ₹5/share (500%), a 43% hike from the previous year.

### Q4 FY25 Snapshot

Quarterly revenue stood at ₹64,890 crore, up 16% YoY. EBITDA rose 43% to ₹10,296 crore. Net Profit grew sharply by 66% YoY to ₹5,284 crore. Aluminium Upstream achieved a record EBITDA of ₹4,838 crore with industry-leading margins of 47%.

Downstream EBITDA hit a new quarterly high at ₹219 crore, up 52%. Over 10,000 aluminium battery enclosures were delivered to Mahindra's electric SUV platforms.

### Operational Excellence Across Business Segments Aluminium (India)

Upstream operations benefited from lower input costs and favourable macroeconomic conditions. Q4 revenue grew 22% YoY to ₹10,311 crore. EBITDA margins stood at a strong 47%, with EBITDA per tonne up 74% YoY.

Hindalco also secured Meenakshi coal mines to enhance long-term resource security. Downstream segment saw a 23% increase in revenue to ₹3,595 crore, driven by a healthier product mix. EBITDA increased 52% YoY to ₹219 crore. Hindalco's dedicated EV component facility in Chakan contributed to e-mobility with 10,000 battery enclosures delivered.

### Copper (India)

Despite challenging global refining charges (TC/RCs), the copper division delivered a strong EBITDA of ₹614 crore in Q4. Revenue rose 8% YoY to ₹14,565 crore. CCR sales reached 109 KT, up 12%. Projects for copper recycling and copper tubes are progressing steadily.

### Novelis (Global Operations)

Q4 shipments reached 957 KT, up 1% YoY. Revenue rose 13% to \$4.6 billion, aided by higher aluminium prices. Despite a dip in EBITDA (down 8%), Net Income rose 77% YoY to \$294 million due to gains in derivatives and favourable pricing. Maintained 63% recycled content and commissioned two new recycling centres to enhance sustainability.

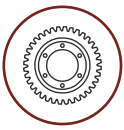
### Strategic Focus and ESG Leadership

Managing Director Mr. Satish Pai attributed Hindalco's record-breaking performance to operational resilience, disciplined cost management, and momentum across its core businesses. With growing investments in smelter expansion, copper value-added products, e-waste recycling, and specialty alumina, Hindalco is gearing up for accelerated, sustainable growth.

On the sustainability front, Hindalco continues to excel:

Recognized as the World's Most Sustainable Aluminium Company for the fifth consecutive year by DJSI. Awards for water management, green manufacturing, and employee wellness underline its ESG leadership.





## Green Galvanize 2025



India Lead Zinc Development Association (ILZDA) organized the above event with focus on Technology, Environment & Markets at Pride Hotel, Nagpur during 5 & 6 May 2025. The conference was sponsored by JSW Steel Coated Products Ltd, Tata Steel Ltd, Rubamin Ltd, Hindustan Zinc Limited, VNS Chemical Industry, Step Techno Solutions LLP, Unique galvanizing Solutions Pvt Ltd, Gimeco Impianti Italy and Haryana Chemicals Ltd. Knowledge Partners were Multi Commodity Exchange of India Ltd and International Lead & Zinc Study Group. Media Partners were MetalWorld and Steel & Metallurgy; the Association Partners were International Zinc Association, Material Recycling Association of India, The Indian Institute of Metals-Nagpur Chapter and Recycling & Environment Industry Association of India. Twenty technical presentations were made by overseas and Indian experts. The presentations covered global outlook for Zinc, HZL's future vision for Zinc, use of galvanized steel in auto bodies, innovations in JSW Group, family of Zinc-coated steel sheets, environmental regulations, technology for general galvanizing, current and future markets for galvanized steel etc., There were meaningful interactions by the audience with the speakers.

About 130 delegates from India and abroad participated in the two-day event. In the morning of 5th May, Inaugural Address was delivered by Mr Bhupinder Singh Khera, Head Operations-Coated Products, JSW Steel Coated Products Ltd after the Welcome Address by L Pugazhenthly, Executive Director, ILZDA. Others who spoke in the Inaugural Session were Dr Anupam Agnihotri, Director, JNARDDC, Dr D B Boralkar, Former Member Secretary, Maharashtra SPCB, Joao Jorge, Director Market Research & Statistics, ILZSG & Martin Van Leeuwen, Technology & Market Development, IZA. At the Inaugural Session, Praveen Kumar Mabian, JSW Steel Coated Products Ltd and Bhimsen Singh, Shilpa Steel & Power Ltd were recognized and honoured with "ILZDA Appreciation Award".

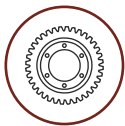
On 5 June afternoon, the delegates were taken for a visit to the Kalmeshwar unit of JSW; 5th May evening Cultural Programme and Gala Dinner were hosted which delegates enjoyed thoroughly. Technical sessions on Environment & Recycling, Markets, Technology & Sustainability were conducted on 6th May 2025 which witnessed very informative technical presentations followed by meaningful discussions. With participation from industry leaders, technical experts, policymakers, and academia, the event facilitated collaboration and knowledge-sharing

aimed at advancing sustainable practices and technological innovations in zinc usage. Delegates had the opportunity to network with peers and explore synergies that could drive progress in areas such as coated steel solutions, environmental compliance, and emerging market opportunities.

Feedback from attendees highlighted the relevance and timeliness of the topics discussed, especially in light of growing environmental concerns and the need for circular economy solutions in the metals sector. The inclusion of field visits, cultural engagements, and networking dinners added a dynamic and holistic touch to the proceedings, ensuring that the conference was not only informative but also engaging. ILZDA's successful organization of this event reinforces its role as a catalyst for industry growth and sustainability in the lead and zinc sectors.



The two-day conference served as a vital platform for stakeholders across the zinc and galvanizing value chain to engage in productive dialogue and exchange cutting-edge insights.



# Copper Market Caught in Crossfire of Tariffs, Policy Uncertainty & Supply Tightness

Copper prices have seen a dramatic turnaround in recent weeks, with the entire 16% rally from the first quarter of 2025 wiped out in just a few trading sessions in April. The sharp correction came as US President Trump's aggressive tariff measures reignited recession fears, triggering a broad-based selloff across global financial markets — and copper was no exception.

Yet, the plunge in copper prices has presented buying opportunities for some Chinese consumers, particularly amid prevailing tightness in the physical market.

**Copper: Stuck Between Policy Shocks and Demand Uncertainty**  
Tariff-related developments, aggressive policy actions, and political manoeuvrings have thrown the copper market into a state of flux. President Trump's plan to roll out reciprocal tariffs and Section 232 levies on imports is set to weigh heavily on global trade and economic activity in the coming weeks.

This could drive a sharp slowdown in global growth, forcing physical demand for copper — and speculative positioning — to weaken further. Additionally, the past few months of pre-buying and stockpiling of metals and goods may now unwind, exacerbating pressure on prices.

East Asia, home to key manufacturing hubs like China and Vietnam, looks particularly vulnerable to this tariff-driven growth shock. With little sign of progress on trade negotiations, retaliatory tariffs from China and

Europe — coupled with deflationary impulses outside the US and a potential buyers' strike within the US — leave copper exposed to further downside risk.

**Policy Easing Could Provide Medium-Term Support**  
While near-term headwinds dominate, there is some light at the end of the tunnel. Global policymakers, including the US Federal Reserve, have room to respond to this slowdown through monetary easing.

In particular, the US Fed could cut interest rates down to 3.25% or lower and potentially restart quantitative easing (QE) — a signal that has historically supported risk assets like copper (as seen in March 2020). Moreover, with the 2026 US mid-term elections in sight, there is a clear incentive for the administration to ensure a growth rebound by the first half of 2026. That said, any bullish recovery for copper and other commodities may only materialize from lower price levels and after policy responses have gained traction.

Key Triggers to Watch for a Bottom in Copper Prices (Ranked by Likelihood & Impact)  
**China's Scrap Supply Headache Adds to Copper Market Woes**  
Adding another layer of complexity is China's looming copper scrap supply crunch following its retaliation against US tariffs.

Beijing's swift response — a 34% tariff on US goods mirroring Washington's latest measures — is set to effectively halt copper scrap imports from the US starting next month. The US supplied about 20% of China's total copper scrap

imports in 2023, serving as a crucial alternative feedstock amid the tightening global ore supply. Estimates from the Shanghai Metals Market suggest US scrap shipments to China may not exceed 100,000 tons in the first four months of 2025, a sharp drop from the nearly 440,000 tons imported in 2023.

Despite global ore scarcity, China has aggressively expanded its copper smelting capacity in recent years. This has driven processing fees into negative territory — meaning smelters now have to pay to process concentrates into refined copper.

Copper scrap imports have acted as a vital cushion, accounting for nearly 30% of China's refined copper output in 2023, according to the China Nonferrous Metals Industry Association. Any sustained disruption in scrap supply will likely squeeze smelters further, adding to near-term market tightness even as prices slide.

**Outlook: Caution in the Near Term, Opportunities Medium Term**  
The copper market is likely to remain volatile and vulnerable to policy-driven swings in the near term. A combination of slowing global activity, rising trade tensions, and supply dislocations — particularly in scrap flows to China — may keep prices under pressure.



**Aurobinda Gayan**  
**Founder and CEO'**  
**Bluglance Consulting**  
**Private Ltd**

| Key Triggers to Watch for a Bottom in Copper Prices (Ranked by Likelihood & Impact) |             |            |
|---|-------------|------------|
| Trigger   | Impact      | Likelihood |
| Fed Easing (Rate Cuts/QE)   | High        | High       |
| Tariff Pause + US Tax Cuts  | Medium-High | Medium     |
| China Policy Support (Targeted Stimulus/Reforms)                                    | Medium      | Medium     |
| US-China Tariff Deal-Making   | Medium-Low  | Low        |
| Full Tariff Reversal  | Low         | Very Low   |





## News Update

### Anil Agarwal: Make India Aluminium Hub

Vedanta Chairman Anil Agarwal has drawn attention to the strategic role of aluminium and steel in the ongoing global trade war, underscoring the opportunity for India to position itself as the world's aluminium hub. In his LinkedIn post, Mr. Agarwal shed light on how aluminium and steel have emerged as key commodities in the trade standoff, particularly between the US and its trading partners. With the United States imposing a steep 25% tariff on steel and aluminium imports from all countries including close allies like Canada and Mexico, the global metals market is facing widespread disruption. In response, India has implemented a 12% safeguard duty on steel imports to protect its domestic industry. Mr. Agarwal praised this move, stating, "I commend the government for proactively imposing a safeguard duty on steel. I am confident that the government will consider a similar step for aluminium." He emphasized that aluminium, due to its lightweight and recyclable nature, is poised to surpass steel in strategic value. "Modern economies are built on these two metals be it airports, railways, homes, vehicles, or mobile phones. But aluminium has the edge, and with India's massive bauxite reserves, we are well-positioned to lead globally," he said.



A striking visual accompanying his post highlighted the top bauxite-producing nations, with India holding significant potential alongside leaders like Australia, Guinea, and China. Mr. Agarwal pointed out that countries losing access to traditional markets due to tariff barriers will seek alternative destinations like India, making it critical for policymakers to support the domestic aluminium sector.

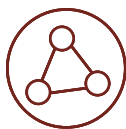
"With our vast bauxite resources, India can become the aluminium capital of the world. This will not only enhance our global standing but also unlock a robust downstream industry that creates jobs and fuels economic growth," his post mentioned. Vedanta Aluminium, a key player in India's aluminium industry, has been at the forefront of this transformation, investing heavily in refining and smelting infrastructure. Mr. Agarwal's call for focused policy support aims to catalyse further development in the sector and leverage India's mineral wealth for long-term strategic advantage.

As global trade realigns, Mr. Agarwal's message reiterates the need for India to seize this moment and establish itself as a leader in the future of metals and manufacturing.

### SMS Group Powers Hydro's Green Shift



SMS group, together with OMAV (a part of SMS group specializing in aluminum extrusion systems), has secured an order from Hydro Extrusion North America to deliver a state-of-the-art, eight-inch HybrEx® extrusion line for its facility in Gainesville, Georgia. The new line, designed to meet Hydro's high safety and efficiency standards, will replace an older press with cutting-edge HybrEx® technology, known for its hybrid drive system. This system significantly reduces energy use and dead cycle times, contributing to a more sustainable production process. A key innovation in the setup is the fully electric scrap shear, which eliminates the use of hydraulic oil in high-temperature zones, creating a safer and environmentally friendly production area. The hybrid design minimizes the use of hydraulic oil, replacing large oil tanks and hot-zone cylinders with electric components. This enables a 30% reduction in energy consumption compared to traditional extrusion lines, while ensuring consistent, safe, and reliable operation. SMS's patented electric shear further boosts safety and performance. Its self-adjusting feature ensures precise, clean cuts and eliminates wear issues common in older hydraulic models. This contributes to long-term reliability and lower maintenance needs. Safety has been a major focus of the collaboration between SMS and Hydro, with the new equipment designed to protect personnel and enhance operational security. Ralph Westphal, VP and GM of Hydro Extrusion's South and East regions, emphasized the company's commitment to modernizing its operations to enhance safety, capacity, and efficiency. Meanwhile, OMAV CEO Massimo Marinelli highlighted the strength of the SMS-Hydro partnership and the forward-looking nature of the technology. Hydro's Gainesville plant, which employs 350 people, serves the building and construction sectors in North America through extrusion, fabrication, and finishing services.



### The Coming Copper Shortage



The global push toward a low-carbon future is set to drive a major shortfall in copper supply over the next decade, warns the International Energy Agency (IEA). Copper, vital for nearly all electrical energy systems, could face a 30% supply gap by 2035 if urgent action is not taken.

IEA Executive Director Fatih Birol emphasized the seriousness of the issue, saying, "It's time to sound the alarm." He called for advanced economies to take a more active role in copper and critical mineral refining, rather than relying heavily on existing supply chains dominated by China.

Currently, China refines more than 70% of the world's top 20 critical minerals—such as cobalt, lithium, manganese, and gallium—despite many of these being mined in resource-rich regions like Africa, Australia, and Latin America. These minerals are essential for solar panels, wind turbines, batteries, and other renewable technologies.

Despite price drops since the pandemic-induced surge in 2021–2022, the market remains heavily concentrated, with minimal diversification expected in the coming decade.

Birol stressed the need for international cooperation: developed countries like the UK, US, Japan, and South Korea should collaborate with resource-rich developing nations to build diversified and resilient supply chains.

Market forces alone won't bridge the gap, Birol warned—governments must intervene by supporting new players and projects to boost mineral supply and reduce dependency on dominant suppliers. Without such measures, price hikes could become a major obstacle to the clean energy transition.

He noted that copper poses a particular concern, as it takes an average of 17 years from discovery to production. Without swift action—through new mining projects, recycling, and the use of alternatives like aluminium—the green transition could become significantly more expensive and delayed.

Still, Birol remains optimistic: "A supply crunch is not inevitable. But we must act quickly."

### India Eyes Lithium & Copper from Chile to Boost Clean Energy and Industry



India is actively seeking to deepen trade relations with Chile to secure essential minerals such as lithium and copper—vital for the country's clean energy transition and industrial growth. According to experts, this collaboration could mark a strategic step in reducing India's dependency on traditional mineral suppliers like China.

Lithium is a key component in electric vehicle (EV) batteries and energy storage systems, while copper plays a crucial role in power infrastructure, including solar and wind energy projects. As India aims to expand its EV production and renewable energy capacity, a steady supply of these minerals becomes critical.

Chile, which holds some of the world's largest reserves of lithium and copper, emerges as a natural partner in this mission. Strengthening trade ties with the Latin American nation could help India access reliable and cost-effective sources of these strategic resources.

The Indian government is expected to pursue a more structured trade agreement or partnership to facilitate long-term cooperation. This aligns with India's vision of becoming a global manufacturing hub for clean energy technologies under its "Make in India" and "Atmanirbhar Bharat" (self-reliant India) initiatives.

Experts believe that this move will not only secure India's energy future but also boost domestic industries such as electric vehicles, electronics, and infrastructure, which depend heavily on mineral imports. It also opens doors for India to become a more competitive player in the global green economy.





## News Update

### Hindalco Bets on Aluminium Cans Amid Recession Concerns in the US



Hindalco Industries believes that a potential economic slowdown in the US could actually boost demand for aluminium beverage cans. As more consumers choose to stay home during uncertain times, at-home consumption of drinks like soft drinks and beer tends to rise—supporting demand for packaged beverages.

Speaking to Moneycontrol, Hindalco Managing Director Satish Pai explained that downturns often change consumer behavior, leading to increased consumption of beverages in aluminium cans. This trend directly benefits Hindalco's US-based subsidiary, Novelis, which supplies major beverage brands like PepsiCo and Coca-Cola.

Novelis earns about 60% of its revenue from beverage packaging, with the rest coming from the automotive, aerospace, and electronics sectors. Not only is Novelis one of the top suppliers in the aluminium can industry, it is also a global leader in recycling, producing new aluminium sheets from billions of used cans each year.

As the world's largest producer of aluminium sheet for beverage cans, Novelis plays a crucial role in the circular economy. Its scale and strong relationships with global beverage companies place it in a favorable position to benefit when consumption shifts toward packaged drinks.

Pai noted that during the COVID-19 pandemic, the company saw record-high demand for cans. He added that a similar trend could emerge if the US enters a slowdown again—though weaker demand from the auto sector, which offers higher profit margins, might offset some gains.

Despite recent caution from beverage companies over softening demand, Hindalco continues to receive strong orders for cans in North America. Pai mentioned that the region is currently facing a can supply shortage of about 500,000 tonnes, with some of the gap being filled by imports from Korea and other countries.

Looking beyond short-term gains, Hindalco is also reshaping its long-term strategy. It aims to become more downstream-focused by offering specialized aluminium solutions. Out of its Rs 45,000 crore capital expenditure plan over the next few years, around Rs 2,000–3,000 crore is being invested in value-added segments.

The company is also stepping into emerging sectors such as electric vehicles, battery systems, and smartphones. Pai revealed that Hindalco has started developing components for EVs and is preparing to manufacture smartphone bodies at one of its extrusion plants, focusing on parts used in electrification.

### US Aluminium Smelters vs. Big Tech



It's been 45 years since the US built a new primary aluminium smelter. From a peak of 33 smelters in 1980, the number has dropped to just six today, with only a few running at full capacity. New projects by Emirates Global Aluminium in Oklahoma and Century Aluminum in the Midwest aim to reverse this decline, but both face a major hurdle — the soaring cost of electricity.

Aluminium smelting is highly energy-intensive, requiring more power than entire cities. While smelters need long-term power deals at no more than \$40 per MWh to be viable, tech giants building AI data centers are willing to pay nearly triple that for 24/7 electricity.

This competition, along with a looming national energy shortfall, makes affordable, fixed-price power deals increasingly difficult to secure. Meanwhile, the US is expanding aluminium recycling, which uses just 5% of the energy needed for new production.

But with a low can recycling rate and over 2 million tonnes of scrap exported annually, supply is tight. Boosting domestic recycling may be a faster, cheaper way to strengthen aluminium supply than betting on new smelters locked in an uphill power battle with Big Tech.



### Revolution in Aluminium Recycling



The aluminium industry is accelerating efforts to create a closed-loop supply chain, with aluminium dross emerging as a key focus.

Once considered waste, dross is now being transformed into a valuable resource thanks to rapid advancements in recycling technologies. Smelters worldwide are embracing innovative processing methods to reduce environmental impact and meet ambitious sustainability goals. In 2024, an estimated 60–70% of aluminium dross was recovered globally.

China led with a 70–75% recovery rate from over 2 million tonnes, while Europe achieved 80–85% recovery from more than 400,000 tonnes. North America followed closely, processing 75–80% of 450,000–500,000 tonnes. These recovery efforts not only support environmental objectives but have also resulted in billion-dollar business opportunities, proving the value of modern dross recycling.

A standout example is Alcoa's "Dross-to-Pot" initiative, which is redefining industry norms. In 2023, Alcoa successfully stabilized alloyed dross recycling at Baie-Comeau, fully implemented pure dross recovery at Alumar, and significantly reduced landfill waste at Deschambault, Portland, and Fjardaal. Trial operations have also begun at Bécancour, signaling further progress toward a zero-waste aluminium future.

### India Eyes Chile's Lithium & Copper



India is expected to explore a steady supply of critical minerals like lithium and copper through an expanded trade partnership with Chile, according to experts. As the country accelerates industrial development and shifts toward clean energy, the need for these key resources is projected to rise sharply. Lithium and copper play a vital role in electric vehicles, renewable energy systems, and modern infrastructure, making them essential to India's green growth ambitions. Chile, a global leader in the production of both lithium and copper, presents a strategic opportunity for India to secure these vital materials. Strengthening trade ties with Chile could support India's efforts to scale up its manufacturing capabilities, reduce dependency on other mineral sources, and meet its long-term sustainability and energy transition goals.

### Copper Faces Supply Gap



Global demand for copper, essential to powering a low-carbon future, is expected to significantly outpace supply within the next decade, warns the International Energy Agency (IEA). The agency projects a 30% shortfall in copper supply by 2035 if corrective action isn't taken. As a critical material used in virtually all electrical energy systems, copper is vital to the clean energy transition.

IEA Executive Director Fatih Birol emphasized the urgency, calling it a "major challenge" and urging immediate attention. Birol also highlighted the need for developed nations to expand their role in refining key minerals like copper, and to form equitable partnerships with developing countries. Currently, while many critical minerals are mined globally — from Africa to Latin America — China dominates the refining process, handling over 70% of the world's top 20 energy-related minerals. These include cobalt, lithium, gallium, and manganese, all crucial for making batteries and components for solar, wind, and other renewable energy systems.





## Statistics

### PV Sales Rise 4% YoY in April: SIAM

#### Domestic Sales:

- Passenger Vehicles sales were 3,48,847 units in April 2025.
- Three-wheeler sales were 49,441 units in April 2025
- Two-wheeler sales were 1,458,784 units in April 2025.

As per the latest report, Passenger Vehicles (PV) segment posted its highest ever sales of April in 2025 of 3.49 lakh units, with a growth of 3.9 per cent as compared to April 2024, the data from the Society of Indian Automobile Manufacturers (SIAM) showed.

According to SIAM data revealed that the total production of passenger vehicles, three wheelers, two wheelers and quadricycle in April 2025 was 23,18,882 units.

However, in PV segment, the data of BMW, Mercedes, JLR, Tata Motors and Volvo are not available. On the domestic sales front, passenger Vehicles sales were 3,48,847 units in April 2025.

While the data of the above stated companies were not available for this category as well, SIAM added that without Tata Motors, total PV would be 3,03,648 units for April 2025.

"Auto industry smoothly transitioned to the new regulatory regime of second stage of On-Board Diagnostics (OBD) two regulation for two and three wheelers from April 2025 onwards, in addition to rolling out E-20 compliant gasoline vehicles across the country from this month," stated Rajesh Menon, Director General, SIAM. Three-Wheelers de-grew marginally by 0.7 per cent compared to April of previous year and the domestic sales were 49,441 units for this category.

The industry body added that The Two-wheeler segment de-grew by 16.7 per cent in April 2025, as compared to April 2024, with sales of 14,58,784 units, due to high base effect of April last year, while it is likely to pick up in coming months.



#### Domestic Sales: Monthly

| Category                              | Domestic Sales (In Nos.) |           |          |
|---------------------------------------|--------------------------|-----------|----------|
| Segment/Subsegment                    | April                    |           |          |
|                                       | 2024                     | 2025      | % Change |
| Total Passenger Vehicles <sup>2</sup> | 3,35,629                 | 3,48,847  | 3.9%     |
| Three Wheelers                        |                          |           |          |
| Passenger Carrier                     | 39,383                   | 40,167    | 2.0%     |
| Goods Carrier                         | 8,818                    | 8,135     | -7.7%    |
| E-Rickshaw                            | 1,308                    | 830       | -36.5%   |
| E-Cart                                | 265                      | 309       | 16.6%    |
| Total Three Wheelers                  | 49,774                   | 49,441    | -0.7%    |
| Two Wheelers                          |                          |           |          |
| Scooters                              | 5,81,277                 | 5,48,370  | -5.7%    |
| Motorcycles                           | 11,28,192                | 8,71,666  | -22.7%   |
| Mopeds                                | 41,924                   | 38,748    | -7.6%    |
| Total Two Wheelers                    | 17,51,393                | 14,58,784 | -16.7%   |
| Quadricycle                           | 19                       | 3         | -84.2%   |

(BMW, Mercedes, JLR & Volvo Auto data are not available. Tata Motors Domestic Sales data included only in 'Total PV'. Revised breakdown is not available. Minimum, without Tata Motors, Total PV would be 3,03,648 for April 2025 and 3,03,948 for April 2024.)

Commenting on April-2025 performance, Mr Rajesh Menon, Director General, SIAM said, "Passenger Vehicles segment posted its highest ever sales of April in 2025 of 3.49 Lakh units, with a growth of 3.9% as compared to April 2024. Three-Wheelers de-grew marginally by (-) 0.7% compared to April of previous year, with sales of 0.49 Lakh units.

The Two-Wheeler segment de-grew by (-) 16.7% in April 2025, as compared to April 2024, with sales of 14.59 Lakh units, due to high base effect of April last year, while it is likely to pick up in coming months.

Auto industry smoothly transitioned to the new regulatory regime of 2nd stage of On-Board Diagnostics (OBD) 2 regulation for Two and Three Wheelers from April 2025 onwards, in addition to rolling out E-20 compliant gasoline vehicles across the country from this month."





| SIAM   |                 |                 |                 |                 |               |                      |
|--|-----------------|-----------------|-----------------|-----------------|---------------|----------------------|
| Category & Company wise Summary Report for the month of April 2025 |                 |                 |                 |                 |               |                      |
|  |                 |                 |                 |                 |               | Report II            |
|  |                 |                 |                 |                 |               | (Number of Vehicles) |
| Category   | Production      |                 | Domestic Sales  |                 | Exports       |                      |
| Segment/Subsegment   | April           |                 | April           |                 | April         |                      |
| Manufacturer   | 2024            | 2025            | 2024            | 2025            | 2024          | 2025                 |
| <b>Passenger Vehicles</b>  |                 |                 |                 |                 |               |                      |
| FCA India Automobiles Pvt Ltd                                      | 439             | 451             | 377             | 242             | -             | 312                  |
| Force Motors Ltd   | 49              | 167             | 93              | 180             | -             | 6                    |
| Honda Cars India Ltd   | 9,150           | 4,620           | 4,351           | 3,360           | 6,516         | 1,511                |
| Hyundai Motor India Ltd  | 62,989          | 67,900          | 50,201          | 44,374          | 13,500        | 16,400               |
| Isuzu Motors India Pvt Ltd   | 131             | 1               | 21              | 13              | -             | -                    |
| JSW MG Motor India Pvt Ltd   | 2,588           | 992             | 2,956           | 1,114           | -             | -                    |
| Kia India Pvt Ltd  | 21,800          | 30,711          | 19,968          | 23,623          | 2,204         | 2,304                |
| Mahindra & Mahindra Ltd  | 41,944          | 55,466          | 41,008          | 52,330          | 544           | 2,530                |
| Maruti Suzuki India Ltd  | 1,66,325        | 1,76,784        | 1,37,952        | 1,38,704        | 21,964        | 27,729               |
| Nissan Motor India Pvt Ltd   | 6,843           | 7,962           | 2,404           | 1,825           | 639           | 2,170                |
| PCA Motors Pvt. Ltd  | 700             | 490             | 404             | 339             | 343           | 771                  |
| Renault India Pvt Ltd  | 2,865           | 1,787           | 3,707           | 2,602           | 6             | 378                  |
| SkodaAuto India Pvt Ltd  | 2,762           | 8,679           | 2,579           | 7,302           | 50            | 76                   |
| Toyota Kirloskar Motor Pvt Ltd                                     | 24,268          | 25,297          | 18,676          | 24,789          | 1,794         | 2,496                |
| Volkswagen India Pvt Ltd   | 8,437           | 7,895           | 3,049           | 2,851           | 2,003         | 2,712                |
| <b>Total Passenger Vehicles</b>                                    | <b>3,51,290</b> | <b>3,89,202</b> | <b>2,87,746</b> | <b>3,03,648</b> | <b>49,563</b> | <b>59,395</b>        |

| SIAM   |                  |                  |                  |                  |                 |                      |
|--|------------------|------------------|------------------|------------------|-----------------|----------------------|
| Category & Company wise Summary Report for the month of April 2025 |                  |                  |                  |                  |                 |                      |
|  |                  |                  |                  |                  |                 | Report II            |
|  |                  |                  |                  |                  |                 | (Number of Vehicles) |
| Category   | Production       |                  | Domestic Sales   |                  | Exports         |                      |
| Segment/Subsegment   | April            |                  | April            |                  | April           |                      |
| Manufacturer   | 2024             | 2025             | 2024             | 2025             | 2024            | 2025                 |
| <b>Three Wheelers</b>  |                  |                  |                  |                  |                 |                      |
| Atul Auto Ltd  | 2,089            | 1,640            | 1,646            | 1,427            | 46              | 298                  |
| Bajaj Auto Ltd   | 45,907           | 46,996           | 32,114           | 31,997           | 13,670          | 15,663               |
| Baxy Ltd   | 330              | 258              | 418              | 292              | -               | -                    |
| Force Motors Ltd   | 168              | -                | -                | -                | 280             | -                    |
| Mahindra & Mahindra Ltd  | 6,565            | 5,236            | 5,504            | 5,470            | 84              | 72                   |
| Piaggio Vehicles Pvt Ltd   | 8,751            | 7,964            | 7,776            | 6,320            | 1,036           | 1,294                |
| TI Clean Mobility Pvt Ltd  | 570              | 534              | 658              | 566              | -               | -                    |
| TVS Motor Company Ltd  | 9,199            | 13,975           | 1,658            | 3,369            | 7,365           | 10,197               |
| <b>Total Three Wheelers</b>  | <b>73,579</b>    | <b>76,603</b>    | <b>49,774</b>    | <b>49,441</b>    | <b>22,481</b>   | <b>27,524</b>        |
| <b>Two Wheelers</b>  |                  |                  |                  |                  |                 |                      |
| Ather Energy Pvt. Ltd  | 10,124           | 14,145           | 8,850            | 13,663           | 40              | -                    |
| Bajaj Auto Ltd   | 3,00,579         | 3,25,971         | 2,16,950         | 1,88,615         | 1,24,839        | 1,29,322             |
| Hero MotoCorp Ltd  | 5,08,612         | 3,03,030         | 5,13,296         | 2,88,524         | 20,289          | 16,885               |
| Honda Motorcycle & Scooter India Pvt Ltd                           | 4,93,420         | 5,40,742         | 4,81,046         | 4,22,931         | 60,900          | 57,965               |
| India Kawasaki Motors Pvt Ltd                                      | 72               | 60               | 351              | 442              | -               | -                    |
| India Yamaha Motor Pvt Ltd   | 82,298           | 72,102           | 63,098           | 46,826           | 20,504          | 26,374               |
| Okinawa Autotech Pvt. Ltd  | -                | 32               | 1                | 33               | -               | -                    |
| Piaggio Vehicles Pvt Ltd   | 5,511            | 5,440            | 3,117            | 2,848            | 3,020           | 2,681                |
| Royal-Enfield (Unit of Eicher Motors)                              | 76,216           | 84,163           | 75,038           | 76,002           | 7,005           | 10,557               |
| Suzuki Motorcycle India Pvt Ltd                                    | 1,05,594         | 1,12,257         | 88,067           | 95,214           | 11,310          | 17,734               |
| Triumph Motorcycles India Pvt Ltd                                  | 43               | 5                | 130              | 39               | -               | -                    |
| TVS Motor Company Ltd  | 3,50,517         | 3,94,919         | 3,01,449         | 3,23,647         | 73,143          | 1,06,683             |
| <b>Total Two Wheelers</b>  | <b>19,32,986</b> | <b>18,52,866</b> | <b>17,51,393</b> | <b>14,58,784</b> | <b>3,21,050</b> | <b>3,68,201</b>      |
| <b>Quadracycle</b>   |                  |                  |                  |                  |                 |                      |
| Bajaj Auto Ltd   | 756              | 211              | 19               | 3                | 664             | 210                  |
| <b>Total Quadracycle</b>   | <b>756</b>       | <b>211</b>       | <b>19</b>        | <b>3</b>         | <b>664</b>      | <b>210</b>           |
| <b>Grand Total</b>   | <b>23,58,611</b> | <b>23,18,882</b> | <b>20,88,932</b> | <b>18,11,876</b> | <b>3,93,758</b> | <b>4,55,330</b>      |
| Society of Indian Automobile Manufacturers ( 15/05/2025)           |                  |                  |                  |                  |                 |                      |





| SIAM  |                  |                  |               |                  |                  |               |                 |                 |               |
|---|------------------|------------------|---------------|------------------|------------------|---------------|-----------------|-----------------|---------------|
| Summary Report: Production, Domestic Sales & Exports data for the month of April 2025 |                  |                  |               |                  |                  |               |                 |                 |               |
| Report I  |                  |                  |               |                  |                  |               |                 |                 |               |
| (Number of Vehicles)  |                  |                  |               |                  |                  |               |                 |                 |               |
| Category  | Production       |                  |               | Domestic Sales   |                  |               | Exports         |                 |               |
| Segment/Subsegment  | April            |                  |               | April            |                  |               | April           |                 |               |
|   | 2024             | 2025             | % Change      | 2024             | 2025             | % Change      | 2024            | 2025            | % Change      |
| <b>Passenger Vehicles*</b>  |                  |                  |               |                  |                  |               |                 |                 |               |
| Passenger Cars  | 1,31,846         | 1,35,819         | 3.0%          | 96,357           | 91,148           | -5.4%         | 30,268          | 27,947          | -7.7%         |
| Utility Vehicles  | 2,06,585         | 2,41,529         | 16.9%         | 1,79,329         | 2,01,062         | 12.1%         | 19,022          | 31,115          | 63.6%         |
| Vans  | 12,859           | 11,854           | -7.8%         | 12,060           | 11,438           | -5.2%         | 273             | 333             | 22.0%         |
| <b>Total Passenger Vehicles</b>   | <b>3,51,290</b>  | <b>3,89,202</b>  | <b>10.8%</b>  | <b>2,87,746</b>  | <b>3,03,648</b>  | <b>5.5%</b>   | <b>49,563</b>   | <b>59,395</b>   | <b>19.8%</b>  |
| <b>Three Wheelers</b>   |                  |                  |               |                  |                  |               |                 |                 |               |
| Passenger Carrier   | 62,182           | 67,252           | 8.2%          | 39,383           | 40,167           | 2.0%          | 22,359          | 27,278          | 22.0%         |
| Goods Carrier   | 9,758            | 8,513            | -12.8%        | 8,818            | 8,135            | -7.7%         | 122             | 246             | 101.6%        |
| E-Rickshaw  | 1,350            | 571              | -57.7%        | 1,308            | 830              | -36.5%        | -               | -               | -             |
| E-Cart  | 289              | 267              | -7.6%         | 265              | 309              | 16.6%         | -               | -               | -             |
| <b>Total Three Wheelers</b>   | <b>73,579</b>    | <b>76,603</b>    | <b>4.1%</b>   | <b>49,774</b>    | <b>49,441</b>    | <b>-0.7%</b>  | <b>22,481</b>   | <b>27,524</b>   | <b>22.4%</b>  |
| <b>Two Wheelers</b>   |                  |                  |               |                  |                  |               |                 |                 |               |
| Scooters  | 5,94,694         | 6,48,633         | 9.1%          | 5,81,277         | 5,48,370         | -5.7%         | 65,874          | 53,879          | -18.2%        |
| Motorcycles   | 12,98,063        | 11,66,462        | -10.1%        | 11,28,192        | 8,71,666         | -22.7%        | 2,54,744        | 3,13,008        | 22.9%         |
| Mopeds  | 40,229           | 37,771           | -6.1%         | 41,924           | 38,748           | -7.6%         | 432             | 1,314           | 204.2%        |
| <b>Total Two Wheelers</b>   | <b>19,32,986</b> | <b>18,52,866</b> | <b>-4.1%</b>  | <b>17,51,393</b> | <b>14,58,784</b> | <b>-16.7%</b> | <b>3,21,050</b> | <b>3,68,201</b> | <b>14.7%</b>  |
| <b>Quadracycle</b>  | <b>756</b>       | <b>211</b>       | <b>-72.1%</b> | <b>19</b>        | <b>3</b>         | <b>-84.2%</b> | <b>664</b>      | <b>210</b>      | <b>-68.4%</b> |
| <b>Grand Total</b>  | <b>23,58,611</b> | <b>23,18,882</b> | <b>-1.7%</b>  | <b>20,88,932</b> | <b>18,11,876</b> | <b>-13.3%</b> | <b>3,93,758</b> | <b>4,55,330</b> | <b>15.6%</b>  |
| * BMW, Mercedes,JLR, Tata Motors and Volvo Auto data is not available                 |                  |                  |               |                  |                  |               |                 |                 |               |
| Society of Indian Automobile Manufacturers ( 15/05/2025)                              |                  |                  |               |                  |                  |               |                 |                 |               |

| SIAM   |                 |                 |                 |                 |               |               |  |
|--|-----------------|-----------------|-----------------|-----------------|---------------|---------------|--|
| Segment & Company wise Production, Domestic Sales & Exports Report for the month of April 2025 |                 |                 |                 |                 |               |               |  |
| Report III   |                 |                 |                 |                 |               |               |  |
| (Number of Vehicles)   |                 |                 |                 |                 |               |               |  |
| Category   | Production      |                 | Domestic Sales  |                 | Exports       |               |  |
| Segment/Subsegment   | April           |                 | April           |                 | April         |               |  |
| Manufacturer   | 2024            | 2025            | 2024            | 2025            | 2024          | 2025          |  |
| <b>Passenger Vehicles</b>  |                 |                 |                 |                 |               |               |  |
| <b>A: Passenger Cars</b>   |                 |                 |                 |                 |               |               |  |
| Honda Cars India Ltd   | 3,450           | 2,911           | 2,620           | 2,425           | 4,016         | 531           |  |
| Hyundai Motor India Ltd  | 26,579          | 31,100          | 16,413          | 12,891          | 11,096        | 13,785        |  |
| Maruti Suzuki India Ltd  | 92,532          | 92,290          | 69,339          | 68,244          | 13,282        | 11,272        |  |
| Nissan Motor India Pvt Ltd   | 2,631           | 1,551           | -               | -               | 561           | -             |  |
| Renault India Pvt Ltd  | 593             | 890             | 977             | 595             | -             | 238           |  |
| SkodaAuto India Pvt Ltd  | 1,121           | 1,305           | 1,266           | 1,048           | -             | -             |  |
| Toyota Kirloskar Motor Pvt Ltd   | 174             | 218             | 4,559           | 4,340           | -             | -             |  |
| Volkswagen India Pvt Ltd   | 4,766           | 5,554           | 1,183           | 1,605           | 1,313         | 2,121         |  |
| <b>Total A: Passenger Cars</b>   | <b>1,31,846</b> | <b>1,35,819</b> | <b>96,357</b>   | <b>91,148</b>   | <b>30,268</b> | <b>27,947</b> |  |
| <b>B: Utility Vehicles</b>   |                 |                 |                 |                 |               |               |  |
| FCA India Automobiles Pvt Ltd  | 439             | 451             | 377             | 242             | -             | 312           |  |
| Force Motors Ltd   | 49              | 167             | 93              | 180             | -             | 6             |  |
| Honda Cars India Ltd   | 5,700           | 1,709           | 1,731           | 935             | 2,500         | 980           |  |
| Hyundai Motor India Ltd  | 36,410          | 36,800          | 33,788          | 31,483          | 2,404         | 2,615         |  |
| Isuzu Motors India Pvt Ltd   | 131             | 1               | 21              | 13              | -             | -             |  |
| JSW MG Motor India Pvt Ltd   | 2,588           | 992             | 2,956           | 1,114           | -             | -             |  |
| Kia India Pvt Ltd  | 21,800          | 30,711          | 19,968          | 23,623          | 2,204         | 2,304         |  |
| Mahindra & Mahindra Ltd  | 41,929          | 55,466          | 41,008          | 52,330          | 534           | 2,530         |  |
| Maruti Suzuki India Ltd  | 60,949          | 72,640          | 56,553          | 59,022          | 8,419         | 16,124        |  |
| Nissan Motor India Pvt Ltd   | 4,212           | 6,411           | 2,404           | 1,825           | 78            | 2,170         |  |
| PCA Motors Pvt. Ltd  | 700             | 490             | 404             | 339             | 343           | 771           |  |
| Renault India Pvt Ltd  | 2,272           | 897             | 2,730           | 2,007           | 6             | 140           |  |
| SkodaAuto India Pvt Ltd  | 1,641           | 7,374           | 1,313           | 6,254           | 50            | 76            |  |
| Toyota Kirloskar Motor Pvt Ltd   | 24,094          | 25,079          | 14,117          | 20,449          | 1,794         | 2,496         |  |
| Volkswagen India Pvt Ltd   | 3,671           | 2,341           | 1,866           | 1,246           | 690           | 591           |  |
| <b>Total B: Utility Vehicles</b>   | <b>2,06,585</b> | <b>2,41,529</b> | <b>1,79,329</b> | <b>2,01,062</b> | <b>19,022</b> | <b>31,115</b> |  |
| <b>C: Vans</b>   |                 |                 |                 |                 |               |               |  |
| Mahindra & Mahindra Ltd  | 15              | -               | -               | -               | 10            | -             |  |
| Maruti Suzuki India Ltd  | 12,844          | 11,854          | 12,060          | 11,438          | 263           | 333           |  |
| <b>Total C: Vans</b>   | <b>12,859</b>   | <b>11,854</b>   | <b>12,060</b>   | <b>11,438</b>   | <b>273</b>    | <b>333</b>    |  |
| <b>Total Passenger Vehicles</b>  | <b>3,51,290</b> | <b>3,89,202</b> | <b>2,87,746</b> | <b>3,03,648</b> | <b>49,563</b> | <b>59,395</b> |  |



| SIAM   |                  |                  |                  |                  |                 |                      |
|--|------------------|------------------|------------------|------------------|-----------------|----------------------|
| Segment & Company wise Production, Domestic Sales & Exports Report for the month of April 2025 |                  |                  |                  |                  |                 |                      |
|  |                  |                  |                  |                  |                 | Report III           |
|  |                  |                  |                  |                  |                 | (Number of Vehicles) |
| Category   | Production       |                  | Domestic Sales   |                  | Exports         |                      |
| Segment/Subsegment   | April            |                  | April            |                  | April           |                      |
| Manufacturer   | 2024             | 2025             | 2024             | 2025             | 2024            | 2025                 |
| <b>Three Wheelers</b>  |                  |                  |                  |                  |                 |                      |
| <b>A: Passenger Carrier</b>  |                  |                  |                  |                  |                 |                      |
| Atul Auto Ltd  | 689              | 537              | 457              | 408              | 42              | 257                  |
| Bajaj Auto Ltd   | 41,896           | 42,602           | 28,119           | 27,570           | 13,654          | 15,599               |
| Baxy Ltd   | 70               | 60               | 80               | 27               | -               | -                    |
| Force Motors Ltd   | 168              | -                | -                | -                | 280             | -                    |
| Mahindra & Mahindra Ltd  | 3,714            | 4,177            | 3,272            | 4,391            | 84              | 48                   |
| Piaggio Vehicles Pvt Ltd   | 6,030            | 5,444            | 5,222            | 3,845            | 974             | 1,234                |
| TI Clean Mobility Pvt Ltd  | 570              | 516              | 658              | 566              | -               | -                    |
| TVS Motor Company Ltd  | 9,045            | 13,916           | 1,575            | 3,360            | 7,325           | 10,140               |
| <b>Total A: Passenger Carrier</b>  | <b>62,182</b>    | <b>67,252</b>    | <b>39,383</b>    | <b>40,167</b>    | <b>22,359</b>   | <b>27,278</b>        |
| <b>E-Rickshaw</b>  |                  |                  |                  |                  |                 |                      |
| Atul Auto Ltd  | 372              | 237              | 324              | 273              | -               | -                    |
| Baxy Ltd   | 163              | 109              | 204              | 200              | -               | -                    |
| Mahindra & Mahindra Ltd  | 815              | 225              | 780              | 357              | -               | -                    |
| <b>Total E-Rickshaw</b>  | <b>1,350</b>     | <b>571</b>       | <b>1,308</b>     | <b>830</b>       | <b>-</b>        | <b>-</b>             |
| <b>B: Goods Carrier</b>  |                  |                  |                  |                  |                 |                      |
| Atul Auto Ltd  | 884              | 688              | 746              | 531              | 4               | 41                   |
| Bajaj Auto Ltd   | 4,011            | 4,394            | 3,995            | 4,427            | 16              | 64                   |
| Baxy Ltd   | 49               | -                | 103              | 2                | -               | -                    |
| Mahindra & Mahindra Ltd  | 1,939            | 834              | 1,337            | 691              | -               | 24                   |
| Piaggio Vehicles Pvt Ltd   | 2,721            | 2,520            | 2,554            | 2,475            | 62              | 60                   |
| TI Clean Mobility Pvt Ltd  | -                | 18               | -                | -                | -               | -                    |
| TVS Motor Company Ltd  | 154              | 59               | 83               | 9                | 40              | 57                   |
| <b>Total B: Goods Carrier</b>  | <b>9,758</b>     | <b>8,513</b>     | <b>8,818</b>     | <b>8,135</b>     | <b>122</b>      | <b>246</b>           |
| <b>E-Cart</b>  |                  |                  |                  |                  |                 |                      |
| Atul Auto Ltd  | 144              | 178              | 119              | 215              | -               | -                    |
| Baxy Ltd   | 48               | 89               | 31               | 63               | -               | -                    |
| Mahindra & Mahindra Ltd  | 97               | -                | 115              | 31               | -               | -                    |
| <b>Total E-Cart</b>  | <b>289</b>       | <b>267</b>       | <b>265</b>       | <b>309</b>       | <b>-</b>        | <b>-</b>             |
| <b>Total Three Wheelers</b>  | <b>73,579</b>    | <b>76,603</b>    | <b>49,774</b>    | <b>49,441</b>    | <b>22,481</b>   | <b>27,524</b>        |
| SIAM   |                  |                  |                  |                  |                 |                      |
| Segment & Company wise Production, Domestic Sales & Exports Report for the month of April 2025 |                  |                  |                  |                  |                 |                      |
|  |                  |                  |                  |                  |                 | Report III           |
|  |                  |                  |                  |                  |                 | (Number of Vehicles) |
| Category   | Production       |                  | Domestic Sales   |                  | Exports         |                      |
| Segment/Subsegment   | April            |                  | April            |                  | April           |                      |
| Manufacturer   | 2024             | 2025             | 2024             | 2025             | 2024            | 2025                 |
| <b>Two Wheelers</b>  |                  |                  |                  |                  |                 |                      |
| <b>A: Scooters</b>   |                  |                  |                  |                  |                 |                      |
| Ather Energy Pvt. Ltd  | 10,124           | 14,145           | 8,850            | 13,663           | 40              | -                    |
| Bajaj Auto Ltd   | 12,694           | 21,015           | 11,121           | 19,266           | -               | -                    |
| Hero MotoCorp Ltd  | 30,478           | 18,966           | 31,712           | 17,978           | 5,329           | 1,339                |
| Honda Motorcycle & Scooter India Pvt Ltd   | 2,79,399         | 3,05,426         | 2,83,482         | 2,16,182         | 36,374          | 37,177               |
| India Yamaha Motor Pvt Ltd   | 29,730           | 24,730           | 24,781           | 21,345           | 7,766           | 4,494                |
| Okinawa Autotech Pvt. Ltd  | -                | 32               | 1                | 33               | -               | -                    |
| Piaggio Vehicles Pvt Ltd   | 4,146            | 3,509            | 2,885            | 2,569            | 1,884           | 1,109                |
| Suzuki Motorcycle India Pvt Ltd  | 92,125           | 94,592           | 86,106           | 93,855           | 2,694           | 3,498                |
| TVS Motor Company Ltd  | 1,35,998         | 1,66,218         | 1,32,339         | 1,63,479         | 11,787          | 6,262                |
| <b>Total A: Scooters</b>   | <b>5,94,694</b>  | <b>6,48,633</b>  | <b>5,81,277</b>  | <b>5,48,370</b>  | <b>65,874</b>   | <b>53,879</b>        |
| <b>B: Motorcycles</b>  |                  |                  |                  |                  |                 |                      |
| Bajaj Auto Ltd   | 2,87,885         | 3,04,956         | 2,05,829         | 1,69,349         | 1,24,839        | 1,29,322             |
| Hero MotoCorp Ltd  | 4,78,134         | 2,84,064         | 4,81,584         | 2,70,546         | 14,960          | 15,546               |
| Honda Motorcycle & Scooter India Pvt Ltd   | 2,14,021         | 2,35,316         | 1,97,564         | 2,06,749         | 24,526          | 20,788               |
| India Kawasaki Motors Pvt Ltd  | 72               | 60               | 351              | 442              | -               | -                    |
| India Yamaha Motor Pvt Ltd   | 52,568           | 47,372           | 38,317           | 25,481           | 12,738          | 21,880               |
| Piaggio Vehicles Pvt Ltd   | 1,365            | 1,931            | 232              | 279              | 1,136           | 1,572                |
| Royal-Enfield (Unit of Eicher Motors)  | 76,216           | 84,163           | 75,038           | 76,002           | 7,005           | 10,557               |
| Suzuki Motorcycle India Pvt Ltd  | 13,469           | 17,665           | 1,961            | 1,359            | 8,616           | 14,236               |
| Triumph Motorcycles India Pvt Ltd  | 43               | 5                | 130              | 39               | -               | -                    |
| TVS Motor Company Ltd  | 1,74,290         | 1,90,930         | 1,27,186         | 1,21,420         | 60,924          | 99,107               |
| <b>Total B: Motorcycles</b>  | <b>12,98,063</b> | <b>11,66,462</b> | <b>11,28,192</b> | <b>8,71,666</b>  | <b>2,54,744</b> | <b>3,13,008</b>      |
| <b>C: Mopeds</b>   |                  |                  |                  |                  |                 |                      |
| TVS Motor Company Ltd  | 40,229           | 37,771           | 41,924           | 38,748           | 432             | 1,314                |
| <b>Total C: Mopeds</b>   | <b>40,229</b>    | <b>37,771</b>    | <b>41,924</b>    | <b>38,748</b>    | <b>432</b>      | <b>1,314</b>         |
| <b>Total Two Wheelers</b>  | <b>19,32,986</b> | <b>18,52,866</b> | <b>17,51,393</b> | <b>14,58,784</b> | <b>3,21,050</b> | <b>3,68,201</b>      |
| <b>Quadricycle</b>   |                  |                  |                  |                  |                 |                      |
| Bajaj Auto Ltd   | 756              | 211              | 19               | 3                | 664             | 210                  |
| <b>Total Quadricycle</b>   | <b>756</b>       | <b>211</b>       | <b>19</b>        | <b>3</b>         | <b>664</b>      | <b>210</b>           |
| <b>Grand Total</b>   | <b>23,58,611</b> | <b>23,18,882</b> | <b>20,88,932</b> | <b>18,11,876</b> | <b>3,93,758</b> | <b>4,55,330</b>      |
| Society of Indian Automobile Manufacturers ( 15/05/2025)                                       |                  |                  |                  |                  |                 |                      |





## Statistics

| SIAM  |                 |                 |                |               |               |                      |
|---|-----------------|-----------------|----------------|---------------|---------------|----------------------|
| Sub-segment & Company wise Production, Domestic Sales & Exports Report for the month of April 2025  |                 |                 |                |               |               |                      |
|   |                 |                 |                |               |               | Report IV            |
|   |                 |                 |                |               |               | (Number of Vehicles) |
| Category  | Production      |                 | Domestic Sales |               | Exports       |                      |
| Segment/Subsegment  | April           |                 | April          |               | April         |                      |
| Manufacturer  | 2024            | 2025            | 2024           | 2025          | 2024          | 2025                 |
| <b>Passenger Vehicles</b>   |                 |                 |                |               |               |                      |
| <b>A : Passenger Cars - Upto 5 Seats</b>  |                 |                 |                |               |               |                      |
| <b>Mini :Seats upto-5, Length Normally &lt;3600 mm, Body Style-Hatchback, Engine Displacement Normally upto 1.0 Litre</b>                                   |                 |                 |                |               |               |                      |
| Maruti Suzuki India Ltd (Alto,Spresso)  | 13,702          | 9,714           | 11,519         | 6,332         | 1,625         | 1,374                |
| Renault India Pvt Ltd (Kwid)  | 593             | 890             | 977            | 595           | -             | 238                  |
| <b>Total Mini</b>   | <b>14,295</b>   | <b>10,604</b>   | <b>12,496</b>  | <b>6,927</b>  | <b>1,625</b>  | <b>1,612</b>         |
| <b>Compact :Seats upto-5, Length Normally between 3600 - 4000 mm, Body Style-Sedan/Estate/Hatch/Notchback, Engine Displacement Normally upto 1.4 Litre</b>  |                 |                 |                |               |               |                      |
| Honda Cars India Ltd (Amaze)  | 600             | 2,070           | 1,796          | 2,019         | 180           | 22                   |
| Hyundai Motor India Ltd (Aura,Grand i10,i20)  | 19,970          | 24,377          | 14,842         | 11,886        | 6,597         | 8,044                |
| Maruti Suzuki India Ltd (OEM Model#,Baleno,Celerio,Dzire,Ign)   | 76,845          | 82,576          | 56,953         | 61,591        | 11,087        | 9,554                |
| Toyota Kirloskar Motor Pvt Ltd (Glanza)   | -               | -               | 4,380          | 4,132         | -             | -                    |
| <b>Total Compact</b>  | <b>97,415</b>   | <b>1,09,023</b> | <b>77,971</b>  | <b>79,628</b> | <b>17,864</b> | <b>17,620</b>        |
| <b>Mid-Size: Seats upto-5, Length Normally between 4250 - 4500 mm, Body Style-Sedan/Estate/Hatch/Notchback, Engine Displacement Normally upto 1.6 Litre</b> |                 |                 |                |               |               |                      |
| Honda Cars India Ltd (City)   | 2,850           | 841             | 824            | 406           | 3,836         | 509                  |
| Hyundai Motor India Ltd (Verna)   | 6,609           | 6,723           | 1,571          | 1,005         | 4,499         | 5,741                |
| Maruti Suzuki India Ltd (Ciaz)  | 1,985           | -               | 867            | 321           | 570           | 344                  |
| Nissan Motor India Pvt Ltd (Sunny)  | 2,631           | 1,551           | -              | -             | 561           | -                    |
| Volkswagen India Pvt Ltd (Virtus)   | 4,766           | 5,554           | 1,183          | 1,605         | 1,313         | 2,121                |
| <b>Total Mid-Size</b>   | <b>18,841</b>   | <b>14,669</b>   | <b>4,445</b>   | <b>3,337</b>  | <b>10,779</b> | <b>8,715</b>         |
| <b>Executive :Seats upto-5, Length Normally between 4500 - 4700 mm, Body Style-Sedan/Estate/Notchback, Engine Displacement Normally upto 2 Litre</b>        |                 |                 |                |               |               |                      |
| SkodaAuto India Pvt Ltd (Slavia)  | 1,121           | 1,305           | 1,253          | 1,048         | -             | -                    |
| <b>Total Executive</b>  | <b>1,121</b>    | <b>1,305</b>    | <b>1,253</b>   | <b>1,048</b>  | <b>-</b>      | <b>-</b>             |
| <b>Premium :Seats upto-5, Length Normally between 4700 - 5000 mm, Body Style-Sedan/Estates, Engine Displacement Normally upto 3 Litre</b>                   |                 |                 |                |               |               |                      |
| SkodaAuto India Pvt Ltd (Superb)  | -               | -               | 13             | -             | -             | -                    |
| Toyota Kirloskar Motor Pvt Ltd (Camry)  | 174             | 218             | 179            | 208           | -             | -                    |
| <b>Total Premium</b>  | <b>174</b>      | <b>218</b>      | <b>192</b>     | <b>208</b>    | <b>-</b>      | <b>-</b>             |
| <b>Total Passenger Cars</b>   | <b>1,31,846</b> | <b>1,35,819</b> | <b>96,357</b>  | <b>91,148</b> | <b>30,268</b> | <b>27,947</b>        |

#Only production volume of OEM Model is reported by Maruti Suzuki India Limited.

| SIAM   |               |                 |                |               |              |                      |
|--|---------------|-----------------|----------------|---------------|--------------|----------------------|
| Sub-segment & Company wise Production, Domestic Sales & Exports Report for the month of April 2025   |               |                 |                |               |              |                      |
|  |               |                 |                |               |              | Report IV            |
|  |               |                 |                |               |              | (Number of Vehicles) |
| Category   | Production    |                 | Domestic Sales |               | Exports      |                      |
| Segment/Subsegment   | April         |                 | April          |               | April        |                      |
| Manufacturer   | 2024          | 2025            | 2024           | 2025          | 2024         | 2025                 |
| <b>B : Utility Vehicles/ Sports Utility Vehicles; 4x2 or 4x4 offroad capability ; Generally ladder on frame ; 2 box ; 5 Seats or more but upto 10 Seats.</b> |               |                 |                |               |              |                      |
| <b>UVC : Length &lt; 4000 mm &amp; Price &lt;20 Lakhs</b>  |               |                 |                |               |              |                      |
| Hyundai Motor India Ltd (Exter,Venue)  | 18,359        | 16,378          | 16,876         | 13,369        | 1,462        | 895                  |
| Kia India Pvt Ltd (Sonet,Syros)  | 8,600         | 14,251          | 7,901          | 12,068        | 920          | 954                  |
| Mahindra & Mahindra Ltd (Bolero,Kuv100,Thar,XUV 3XO,Xuv3)  | 20,556        | 22,629          | 19,765         | 19,150        | 7            | 825                  |
| Maruti Suzuki India Ltd (OEM Model#,Brezza,Fronx,Jimny)  | 41,327        | 48,450          | 31,656         | 31,747        | 5,771        | 12,848               |
| Nissan Motor India Pvt Ltd (Magneite)  | 4,212         | 6,411           | 2,404          | 1,749         | 78           | 2,170                |
| PCA Motors Pvt. Ltd (C3,EC3)   | 693           | 296             | 310            | 219           | 26           | 544                  |
| Renault India Pvt Ltd (Kiger,Triber)   | 2,272         | 897             | 2,730          | 2,007         | 6            | 140                  |
| SkodaAuto India Pvt Ltd (Kylaq)  | -             | 6,301           | -              | 5,364         | -            | -                    |
| Toyota Kirloskar Motor Pvt Ltd (Urban Cruiser Taisor)  | -             | -               | -              | 2,421         | -            | -                    |
| <b>Total UVC</b>   | <b>96,019</b> | <b>1,15,613</b> | <b>81,642</b>  | <b>88,094</b> | <b>8,270</b> | <b>18,376</b>        |
| <b>UV1 : Length 4000 to 4400 mm &amp; Price &lt;20 Lakhs</b>   |               |                 |                |               |              |                      |
| Force Motors Ltd (Gurkha,Trax)   | 11            | 18              | -              | 41            | -            | 5                    |
| Honda Cars India Ltd (Elevate)   | 5,700         | 1,709           | 1,731          | 935           | 2,500        | 980                  |
| Hyundai Motor India Ltd (Creta)  | 15,561        | 18,500          | 15,447         | 17,016        | 1            | 594                  |
| JSW MG Motor India Pvt Ltd (Astor)   | 1,213         | 203             | 1,019          | 133           | -            | -                    |
| Kia India Pvt Ltd (Seltos)   | 7,610         | 8,023           | 6,734          | 6,135         | 564          | 463                  |
| Mahindra & Mahindra Ltd (Electric Origin SUV)  | -             | 3,472           | -              | 2,991         | -            | -                    |
| Maruti Suzuki India Ltd (OEM Model#,Ertiga,Grand Vitara)   | 16,238        | 19,936          | 21,195         | 22,934        | 2,647        | 3,245                |
| PCA Motors Pvt. Ltd (Basalt,C3 Aircross)   | 7             | 194             | 93             | 120           | 317          | 227                  |
| SkodaAuto India Pvt Ltd (Kushaq)   | 1,641         | 743             | 1,158          | 783           | 50           | 76                   |
| Toyota Kirloskar Motor Pvt Ltd (Model Manufactured for the sa  | 14,490        | 15,286          | 4,444          | 7,104         | 1,794        | 2,491                |
| Volkswagen India Pvt Ltd (Taigun)  | 3,476         | 2,341           | 1,758          | 1,155         | 690          | 591                  |
| <b>Total UV1</b>   | <b>65,947</b> | <b>70,425</b>   | <b>53,579</b>  | <b>59,347</b> | <b>8,563</b> | <b>8,672</b>         |
| <b>UV2 : Length between 4400 - 4700 mm &amp; Price &lt;20 Lakhs</b>  |               |                 |                |               |              |                      |
| Hyundai Motor India Ltd (Alcazar)  | 2,298         | 1,850           | 1,219          | 1,017         | 941          | 1,126                |
| JSW MG Motor India Pvt Ltd (Hector)  | 1,188         | 789             | 1,813          | 977           | -            | -                    |
| Kia India Pvt Ltd (Carens)   | 5,590         | 8,237           | 5,328          | 5,259         | 720          | 887                  |
| Mahindra & Mahindra Ltd (Bolero Neo Plus,Marazzo,Scorpio,T   | 21,373        | 29,365          | 21,243         | 30,189        | 527          | 1,705                |
| Maruti Suzuki India Ltd (XL6)  | 3,384         | 4,254           | 3,509          | 4,140         | 1            | 31                   |
| <b>Total UV2</b>   | <b>33,833</b> | <b>44,495</b>   | <b>33,112</b>  | <b>41,582</b> | <b>2,189</b> | <b>3,749</b>         |

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## Statistics

| SIAM   |                 |                 |                 |                 |               |                      |
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|  |                 |                 |                 |                 |               | (Number of Vehicles) |
| Category   | Production      |                 | Domestic Sales  |                 | Exports       |                      |
| Segment/Subsegment   | April           |                 | April           |                 | April         |                      |
| Manufacturer   | 2024            | 2025            | 2024            | 2025            | 2024          | 2025                 |
| <b>UV3 : Length &gt;4700 mm &amp; Price &lt;20 Lakhs</b>   |                 |                 |                 |                 |               |                      |
| Force Motors Ltd (Trax)  | 38              | 149             | 40              | 139             | -             | 1                    |
| Toyota Kirloskar Motor Pvt Ltd (Innova Crysta, Innova HyCross)                                     | 6,684           | 7,163           | 7,103           | 7,699           | -             | 2                    |
| <b>Total UV3</b>   | <b>6,722</b>    | <b>7,312</b>    | <b>7,143</b>    | <b>7,838</b>    | <b>-</b>      | <b>3</b>             |
| <b>UV4 : Price between Rs. 20 to 30 Lakh</b>   |                 |                 |                 |                 |               |                      |
| FCA India Automobiles Pvt Ltd (Jeep Compass)   | 311             | 86              | 282             | 137             | -             | 15                   |
| Force Motors Ltd (Gurkha)  | -               | -               | 53              | -               | -             | -                    |
| Hyundai Motor India Ltd (Tucson)   | 163             | 70              | 201             | 65              | -             | -                    |
| Isuzu Motors India Pvt Ltd (Hi-Lander, V-Cross)  | 131             | 1               | 20              | 10              | -             | -                    |
| Maruti Suzuki India Ltd (Invicto)  | -               | -               | 193             | 201             | -             | -                    |
| PCA Motors Pvt. Ltd (C5 Aircross)  | -               | -               | 1               | -               | -             | -                    |
| Toyota Kirloskar Motor Pvt Ltd (Model Manufactured for the sa                                      | 524             | 311             | -               | -               | -             | -                    |
| <b>Total UV4</b>   | <b>1,129</b>    | <b>468</b>      | <b>750</b>      | <b>413</b>      | <b>-</b>      | <b>15</b>            |
| <b>UV5 : Price &gt;Rs. 30 Lakh</b>   |                 |                 |                 |                 |               |                      |
| FCA India Automobiles Pvt Ltd (Jeep Meridian)  | 128             | 365             | 95              | 105             | -             | 297                  |
| Hyundai Motor India Ltd (Ioniq5)   | 29              | 2               | 45              | 16              | -             | -                    |
| Isuzu Motors India Pvt Ltd (MU-X)  | -               | -               | 1               | 3               | -             | -                    |
| JSW MG Motor India Pvt Ltd (Gloster)   | 187             | -               | 124             | 4               | -             | -                    |
| Kia India Pvt Ltd (Carnival, EV6)  | -               | 200             | 5               | 161             | -             | -                    |
| Nissan Motor India Pvt Ltd (X-Trail)   | -               | -               | -               | 76              | -             | -                    |
| SkodaAuto India Pvt Ltd (Kodiahq)  | -               | 330             | 155             | 107             | -             | -                    |
| Toyota Kirloskar Motor Pvt Ltd (Fortuner, Hilux, Land Cruiser, Ve                                  | 2,396           | 2,319           | 2,570           | 3,225           | -             | 3                    |
| Volkswagen India Pvt Ltd (Tiguan)  | 195             | -               | 108             | 91              | -             | -                    |
| <b>Total UV5</b>   | <b>2,935</b>    | <b>3,216</b>    | <b>3,103</b>    | <b>3,788</b>    | <b>-</b>      | <b>300</b>           |
| <b>Total Utility Vehicles</b>  | <b>2,06,585</b> | <b>2,41,529</b> | <b>1,79,329</b> | <b>2,01,062</b> | <b>19,022</b> | <b>31,115</b>        |
| <b>C : Vans ; Generally 1 or 1.5 box; seats upto 5 to 10</b>                                       |                 |                 |                 |                 |               |                      |
| <b>V1 : Hard tops mainly used for personal transport, Price upto Rs. 10 Lakh</b>                   |                 |                 |                 |                 |               |                      |
| Mahindra & Mahindra Ltd (Maxximo)  | 15              | -               | -               | -               | 10            | -                    |
| Maruti Suzuki India Ltd (Eeco)   | 12,844          | 11,854          | 12,060          | 11,438          | 263           | 333                  |
| <b>Total Vans</b>  | <b>12,859</b>   | <b>11,854</b>   | <b>12,060</b>   | <b>11,438</b>   | <b>273</b>    | <b>333</b>           |
| <b>Total Passenger Vehicles</b>  | <b>3,51,290</b> | <b>3,89,202</b> | <b>2,87,746</b> | <b>3,03,648</b> | <b>49,563</b> | <b>59,395</b>        |

| SIAM  |               |               |                |               |               |                      |
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| Sub-segment & Company wise Production, Domestic Sales & Exports Report for the month of April 2025                |               |               |                |               |               |                      |
|   |               |               |                |               |               | Report IV            |
|   |               |               |                |               |               | (Number of Vehicles) |
| Category  | Production    |               | Domestic Sales |               | Exports       |                      |
| Segment/Subsegment  | April         |               | April          |               | April         |                      |
| Manufacturer  | 2024          | 2025          | 2024           | 2025          | 2024          | 2025                 |
| <b>Three Wheelers</b>   |               |               |                |               |               |                      |
| <b>A: Passenger Carrier</b>   |               |               |                |               |               |                      |
| <b>A1: No. of seats Including driver not exceeding 4 &amp; Max. Mass not exceeding 1 tonne</b>                    |               |               |                |               |               |                      |
| Atul Auto Ltd (Atul Mobili, Atul Rik, Atul Rik + 3P, Rik)   | 368           | 181           | 160            | 82            | 42            | 237                  |
| Bajaj Auto Ltd (Maxima, Maxima - EV, RE)  | 41,896        | 42,602        | 28,119         | 27,570        | 13,654        | 15,599               |
| Baxy Ltd (Baxy EVE PRO, Baxy Express Passenger)   | 70            | 60            | 80             | 27            | -             | -                    |
| Mahindra & Mahindra Ltd (Alfa, Treo)  | 3,714         | 4,177         | 3,272          | 4,391         | 84            | 48                   |
| Piaggio Vehicles Pvt Ltd (Ape Auto, Ape City)   | 6,030         | 5,444         | 5,222          | 3,845         | 974           | 1,234                |
| TI Clean Mobility Pvt Ltd (L5M)   | 570           | 516           | 658            | 566           | -             | -                    |
| TVS Motor Company Ltd (TVS King 4S, TVS King Electric)  | 9,045         | 13,916        | 1,575          | 3,360         | 7,325         | 10,140               |
| <b>Total A1</b>   | <b>61,693</b> | <b>66,896</b> | <b>39,086</b>  | <b>39,841</b> | <b>22,079</b> | <b>27,258</b>        |
| <b>A2: No. of seats Including driver exceeding 4 but not exceeding 7 &amp; Max. Mass not exceeding 1.5 tonnes</b> |               |               |                |               |               |                      |
| Atul Auto Ltd (Atul Gem, Gemi Paxe)   | 321           | 356           | 297            | 326           | -             | 20                   |
| Force Motors Ltd (Minidor)  | 168           | -             | -              | -             | 280           | -                    |
| <b>Total A2</b>   | <b>489</b>    | <b>356</b>    | <b>297</b>     | <b>326</b>    | <b>280</b>    | <b>20</b>            |
| <b>Total Passenger Carriers</b>   | <b>62,182</b> | <b>67,252</b> | <b>39,383</b>  | <b>40,167</b> | <b>22,359</b> | <b>27,278</b>        |
| <b>E-Rickshaw</b>   |               |               |                |               |               |                      |
| Atul Auto Ltd (Atul Elite)  | 372           | 237           | 324            | 273           | -             | -                    |
| Baxy Ltd (Baxy E Rath)  | 163           | 109           | 204            | 200           | -             | -                    |
| Mahindra & Mahindra Ltd (e-Alfa Mini, Treo Yaari)   | 815           | 225           | 780            | 357           | -             | -                    |
| <b>Total E-Rickshaw</b>   | <b>1,350</b>  | <b>571</b>    | <b>1,308</b>   | <b>830</b>    | <b>-</b>      | <b>-</b>             |
| <b>B: Goods Carrier</b>   |               |               |                |               |               |                      |
| <b>B1: Max mass not exceeding 1 tonnes</b>  |               |               |                |               |               |                      |
| Atul Auto Ltd (Atul Energie, Atul Gem, Atul Gemini, Atul Samart)  | 884           | 688           | 746            | 531           | 4             | 41                   |
| Bajaj Auto Ltd (Maxima)   | 4,011         | 4,394         | 3,995          | 4,427         | 16            | 64                   |
| Baxy Ltd (Baxy Cargo, Baxy Cargo Super King EV)   | 49            | -             | 103            | 2             | -             | -                    |
| Mahindra & Mahindra Ltd (Alfa, Treo, Zor Grand)   | 1,939         | 834           | 1,337          | 691           | -             | 24                   |
| Piaggio Vehicles Pvt Ltd (Ape Xtra)   | 2,721         | 2,520         | 2,554          | 2,475         | 62            | 60                   |
| TI Clean Mobility Pvt Ltd (L5N)   | -             | 18            | -              | -             | -             | -                    |
| TVS Motor Company Ltd (TVS King Kargo)  | 154           | 59            | 83             | 9             | 40            | 57                   |
| <b>Total Goods Carrier</b>  | <b>9,758</b>  | <b>8,513</b>  | <b>8,818</b>   | <b>8,135</b>  | <b>122</b>    | <b>246</b>           |
| <b>E-Cart</b>   |               |               |                |               |               |                      |
| Atul Auto Ltd (Atul Elite Cargo)  | 144           | 178           | 119            | 215           | -             | -                    |
| Baxy Ltd (Baxy E Cart)  | 48            | 89            | 31             | 63            | -             | -                    |
| Mahindra & Mahindra Ltd (e-Alfa Cargo)  | 97            | -             | 115            | 31            | -             | -                    |
| <b>Total E-Cart</b>   | <b>289</b>    | <b>267</b>    | <b>265</b>     | <b>309</b>    | <b>-</b>      | <b>-</b>             |
| <b>Total Three Wheelers</b>   | <b>73,579</b> | <b>76,603</b> | <b>49,774</b>  | <b>49,441</b> | <b>22,481</b> | <b>27,524</b>        |





## Statistics

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| Sub-segment & Company wise Production, Domestic Sales & Exports Report for the month of April 2025 |                 |                 |                 |                 |               |                      |
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|  |                 |                 |                 |                 |               | (Number of Vehicles) |
| Category   | Production      |                 | Domestic Sales  |                 | Exports       |                      |
| Segment/Subsegment   | April           |                 | April           |                 | April         |                      |
| Manufacturer   | 2024            | 2025            | 2024            | 2025            | 2024          | 2025                 |
| <b>Two Wheelers</b>  |                 |                 |                 |                 |               |                      |
| <b>A : Scooters: Wheel size is less than or equal to 12"</b>                                       |                 |                 |                 |                 |               |                      |
| <b>A1: Engine capacity less than or equal to 75 CC</b>   |                 |                 |                 |                 |               |                      |
| Piaggio Vehicles Pvt Ltd (SXR 50,Typhoon R 50)   | 909             | 767             | -               | -               | 909           | 768                  |
| <b>Total A1</b>  | <b>909</b>      | <b>767</b>      | <b>-</b>        | <b>-</b>        | <b>909</b>    | <b>768</b>           |
| <b>A3: Engine capacity &gt;90 CC but less than or equal to 125 CC</b>                              |                 |                 |                 |                 |               |                      |
| Hero MotoCorp Ltd (Hero Destni 125,Maestro,Pleasure,Xoom)  | 27,182          | 12,039          | 28,832          | 10,862          | 5,329         | 1,339                |
| Honda Motorcycle & Scooter India Pvt Ltd (Activa,Dio,Nav)  | 2,79,399        | 3,03,626        | 2,83,482        | 2,15,342        | 36,374        | 37,177               |
| India Yamaha Motor Pvt Ltd (Fascino,Ray)   | 28,100          | 24,230          | 22,879          | 19,861          | 7,736         | 4,494                |
| Piaggio Vehicles Pvt Ltd (Aprilia,Vespa)   | 2,489           | 2,414           | 2,514           | 2,221           | 682           | 18                   |
| Suzuki Motorcycle India Pvt Ltd (Access,Avenis,Burgman)  | 92,125          | 94,592          | 86,106          | 93,855          | 2,694         | 3,498                |
| TVS Motor Company Ltd (Jupiter,Ntorq,Zest)   | 1,18,271        | 1,39,074        | 1,15,626        | 1,35,875        | 11,097        | 6,182                |
| <b>Total A3</b>  | <b>5,47,566</b> | <b>5,75,975</b> | <b>5,39,439</b> | <b>4,78,016</b> | <b>63,912</b> | <b>52,708</b>        |
| <b>A4 : Engine capacity &gt;125 CC but less than or equal to 150 CC</b>                            |                 |                 |                 |                 |               |                      |
| Piaggio Vehicles Pvt Ltd (Aprilia,Vespa)   | 440             | 315             | 93              | 125             | 292           | 322                  |
| <b>Total A4</b>  | <b>440</b>      | <b>315</b>      | <b>93</b>       | <b>125</b>      | <b>292</b>    | <b>322</b>           |
| <b>A5 : Engine capacity &gt;150 CC but less than or equal to 200 CC</b>                            |                 |                 |                 |                 |               |                      |
| India Yamaha Motor Pvt Ltd (Aerox)   | 1,630           | 500             | 1,902           | 1,484           | 30            | -                    |
| Piaggio Vehicles Pvt Ltd (Aprilia)   | 308             | 13              | 278             | 223             | 1             | 1                    |
| <b>Total A5</b>  | <b>1,938</b>    | <b>513</b>      | <b>2,180</b>    | <b>1,707</b>    | <b>31</b>     | <b>1</b>             |
| <b>AE1:Upto 250 W Electric</b>   |                 |                 |                 |                 |               |                      |
| Bajaj Auto Ltd (Yulu Ver 3.0x)   | -               | -               | -               | 50              | -             | -                    |
| Okinawa Autotech Pvt. Ltd (Lite)   | -               | 32              | 1               | 33              | -             | -                    |
| <b>Total AE1</b>   | <b>-</b>        | <b>32</b>       | <b>1</b>        | <b>83</b>       | <b>-</b>      | <b>-</b>             |
| <b>AE2: More than 250 W Electric</b>   |                 |                 |                 |                 |               |                      |
| Ather Energy Pvt. Ltd (450 Apex,450S,450X,Rizta)   | 10,124          | 14,145          | 8,850           | 13,663          | 40            | -                    |
| Bajaj Auto Ltd (Chetak)  | 12,694          | 21,015          | 11,121          | 19,216          | -             | -                    |
| Hero MotoCorp Ltd (Vida)   | 3,296           | 6,927           | 2,880           | 7,116           | -             | -                    |
| Honda Motorcycle & Scooter India Pvt Ltd (Activa E,QC1)  | -               | 1,800           | -               | 840             | -             | -                    |
| TVS Motor Company Ltd (BMW EV,TVS iQube Electric)  | 17,727          | 27,144          | 16,713          | 27,604          | 690           | 80                   |
| <b>Total AE2</b>   | <b>43,841</b>   | <b>71,031</b>   | <b>39,564</b>   | <b>68,439</b>   | <b>730</b>    | <b>80</b>            |
| <b>Total Scooters</b>  | <b>5,94,694</b> | <b>6,48,633</b> | <b>5,81,277</b> | <b>5,48,370</b> | <b>65,874</b> | <b>53,879</b>        |

| SIAM   |                 |                 |                 |                 |               |                      |
|--|-----------------|-----------------|-----------------|-----------------|---------------|----------------------|
| Sub-segment & Company wise Production, Domestic Sales & Exports Report for the month of April 2025 |                 |                 |                 |                 |               |                      |
|  |                 |                 |                 |                 |               | Report IV            |
|  |                 |                 |                 |                 |               | (Number of Vehicles) |
| Category   | Production      |                 | Domestic Sales  |                 | Exports       |                      |
| Segment/Subsegment   | April           |                 | April           |                 | April         |                      |
| Manufacturer   | 2024            | 2025            | 2024            | 2025            | 2024          | 2025                 |
| <b>B : Motorcycles: Big wheel size – more than 12"</b>   |                 |                 |                 |                 |               |                      |
| <b>B1: Engine capacity &lt;75 CC</b>   |                 |                 |                 |                 |               |                      |
| India Kawasaki Motors Pvt Ltd (KX65)   | -               | -               | -               | 2               | -             | -                    |
| <b>Total B1</b>  | <b>-</b>        | <b>-</b>        | <b>-</b>        | <b>2</b>        | <b>-</b>      | <b>-</b>             |
| <b>B2: Engine Capacity &gt;75 CC but less than equal to 110 CC</b>                                 |                 |                 |                 |                 |               |                      |
| Bajaj Auto Ltd (Boxer,CT,Discover,Platina)   | 64,185          | 81,570          | 50,925          | 33,637          | 36,375        | 40,528               |
| Hero MotoCorp Ltd (HF Dawn,HF Deluxe,Passion,Splendor)   | 4,10,899        | 2,45,927        | 4,21,163        | 2,37,467        | 5,227         | 5,936                |
| Honda Motorcycle & Scooter India Pvt Ltd (CB Twister,Dream,  | 40,935          | 29,019          | 35,403          | 23,833          | 6,903         | 5,071                |
| India Kawasaki Motors Pvt Ltd (KX85)   | -               | -               | -               | 2               | -             | -                    |
| India Yamaha Motor Pvt Ltd (Saluto RX)   | 5,622           | 3,300           | -               | -               | 3,492         | 2,902                |
| TVS Motor Company Ltd (Radeon,Sport,Star City)   | 38,783          | 39,393          | 28,016          | 27,140          | 18,714        | 27,291               |
| <b>Total B2</b>  | <b>5,60,424</b> | <b>3,99,209</b> | <b>5,35,507</b> | <b>3,22,079</b> | <b>70,711</b> | <b>81,728</b>        |
| <b>B3: Engine Capacity &gt;110 CC but less than equal to 125 CC</b>                                |                 |                 |                 |                 |               |                      |
| Bajaj Auto Ltd (Boxer,CT,Discover,Freedom,Husqvarna,KTM,F  | 1,15,424        | 1,17,537        | 88,075          | 80,194          | 31,442        | 44,371               |
| Hero MotoCorp Ltd (Glamour,Splendor,Xtreme 125R)   | 54,306          | 27,923          | 53,874          | 29,122          | 2,068         | 1,263                |
| Honda Motorcycle & Scooter India Pvt Ltd (Shine)   | 1,23,401        | 1,61,084        | 1,21,338        | 1,49,475        | 4,462         | 4,427                |
| India Yamaha Motor Pvt Ltd (Saluto)  | 2,690           | 2,620           | -               | -               | 194           | 1,690                |
| Suzuki Motorcycle India Pvt Ltd (Hayate)   | 120             | 241             | -               | -               | 240           | 264                  |
| TVS Motor Company Ltd (Raider,Star City 125)   | 83,758          | 92,766          | 51,098          | 43,028          | 32,378        | 60,279               |
| <b>Total B3</b>  | <b>3,79,699</b> | <b>4,02,171</b> | <b>3,14,385</b> | <b>3,01,819</b> | <b>70,784</b> | <b>1,12,294</b>      |
| <b>B4: Engine Capacity &gt;125 CC but less than equal to 150 CC</b>                                |                 |                 |                 |                 |               |                      |
| Bajaj Auto Ltd (Boxer,CT 150,Pulsar)   | 40,350          | 36,484          | 30,608          | 15,028          | 16,634        | 17,158               |
| Hero MotoCorp Ltd (Hunk)   | 3,813           | 6,008           | -               | -               | 4,766         | 6,584                |
| Honda Motorcycle & Scooter India Pvt Ltd (CB Unicorn 150)  | -               | 30,777          | -               | 26,017          | -             | -                    |
| India Yamaha Motor Pvt Ltd (FZ,SZ)   | 18,666          | 28,860          | 13,778          | 13,482          | 7,618         | 11,830               |
| <b>Total B4</b>  | <b>62,829</b>   | <b>1,02,129</b> | <b>44,386</b>   | <b>54,527</b>   | <b>29,018</b> | <b>35,572</b>        |
| <b>B5: Engine Capacity &gt;150 CC but less than equal to 200 CC</b>                                |                 |                 |                 |                 |               |                      |
| Bajaj Auto Ltd (Avenger,KTM,Pulsar)  | 41,681          | 44,509          | 24,598          | 27,852          | 21,944        | 16,973               |
| Hero MotoCorp Ltd (Xpulse 200,Xtreme.)   | 5,137           | 4,110           | 3,379           | 3,278           | 2,178         | 1,763                |
| Honda Motorcycle & Scooter India Pvt Ltd (CB 200X,CB Horne   | 45,097          | 10,200          | 37,155          | 4,614           | 8,484         | 7,914                |
| India Kawasaki Motors Pvt Ltd (W175)   | 19              | -               | 158             | 188             | -             | -                    |
| India Yamaha Motor Pvt Ltd (MT 15,R15)   | 24,972          | 10,668          | 24,505          | 11,933          | 840           | 3,602                |
| Suzuki Motorcycle India Pvt Ltd (Gixxer)   | 10,890          | 13,253          | 1,405           | 991             | 7,432         | 11,052               |
| TVS Motor Company Ltd (Apache)   | 46,823          | 51,144          | 45,520          | 45,633          | 8,107         | 9,879                |
| <b>Total B5</b>  | <b>1,74,619</b> | <b>1,33,884</b> | <b>1,36,720</b> | <b>94,489</b>   | <b>48,985</b> | <b>51,183</b>        |



## Statistics

| SIAM   |               |               |                |               |               |                      |
|--|---------------|---------------|----------------|---------------|---------------|----------------------|
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|  |               |               |                |               |               | Report IV            |
|  |               |               |                |               |               | (Number of Vehicles) |
| Category   | Production    |               | Domestic Sales |               | Exports       |                      |
| Segment/Subsegment   | April         |               | April          |               | April         |                      |
| Manufacturer   | 2024          | 2025          | 2024           | 2025          | 2024          | 2025                 |
| <b>B6: Engine Capacity &gt;200 CC but less than equal to 250 CC</b>                                |               |               |                |               |               |                      |
| Bajaj Auto Ltd (Avenger, Dominar, Husqvarna, KTM, Pulsar)  | 14,806        | 10,754        | 8,162          | 6,729         | 7,342         | 3,866                |
| Hero MotoCorp Ltd (Karizma)  | 1,948         | 96            | 947            | -             | 720           | -                    |
| India Kawasaki Motors Pvt Ltd (KLX230, KLX230R S)  | -             | -             | -              | 21            | -             | -                    |
| India Yamaha Motor Pvt Ltd (FZ25)  | 618           | 1,924         | -              | -             | 594           | 1,856                |
| Suzuki Motorcycle India Pvt Ltd (Gixxer 250, V-Strom SX)   | 2,401         | 4,102         | 503            | 304           | 944           | 2,920                |
| TVS Motor Company Ltd (Ronin)  | 2,016         | 5,496         | 2,130          | 5,474         | 172           | 170                  |
| <b>Total B6</b>  | <b>21,789</b> | <b>22,372</b> | <b>11,742</b>  | <b>12,528</b> | <b>9,772</b>  | <b>8,812</b>         |
| <b>B7: Engine Capacity &gt;250 CC but less than equal to 350 CC</b>                                |               |               |                |               |               |                      |
| Honda Motorcycle & Scooter India Pvt Ltd (CB 350, CB300F, C)                                       | 4,538         | 4,236         | 3,618          | 2,810         | 4,677         | 3,376                |
| India Kawasaki Motors Pvt Ltd (KLX300R, Ninja300)  | 1             | -             | 39             | 10            | -             | -                    |
| India Yamaha Motor Pvt Ltd (R3)  | -             | -             | 34             | 66            | -             | -                    |
| Royal-Enfield (Unit of Eicher Motors) (Bullet 350, Classic 350, H                                  | 67,345        | 73,100        | 68,959         | 69,043        | 3,907         | 5,239                |
| TVS Motor Company Ltd (BMW, RR 310)  | 2,910         | 2,131         | 422            | 145           | 1,553         | 1,488                |
| <b>Total B7</b>  | <b>74,794</b> | <b>79,467</b> | <b>73,072</b>  | <b>72,074</b> | <b>10,137</b> | <b>10,103</b>        |
| <b>B8: Engine Capacity &gt;350 CC but less than equal to 500 CC</b>                                |               |               |                |               |               |                      |
| Bajaj Auto Ltd (Dominar, Husqvarna, KTM, Pulsar, Triumph)  | 11,439        | 14,102        | 3,461          | 5,909         | 11,102        | 6,426                |
| Hero MotoCorp Ltd (HD X440, Mavrick 440)   | 2,031         | -             | 2,202          | 661           | 1             | -                    |
| Honda Motorcycle & Scooter India Pvt Ltd (CB 500)  | 35            | -             | 35             | -             | -             | -                    |
| India Kawasaki Motors Pvt Ltd (Eliminator, KX450, Ninja 500, Ni                                    | -             | -             | 30             | 34            | -             | -                    |
| Piaggio Vehicles Pvt Ltd (RS, Tuono)   | 1,365         | 1,931         | 231            | 279           | 1,136         | 1,572                |
| Royal-Enfield (Unit of Eicher Motors) (Guerrilla 450, Himalayan                                    | 4,702         | 5,118         | 2,917          | 2,635         | 1,593         | 3,278                |
| <b>Total B8</b>  | <b>19,572</b> | <b>21,151</b> | <b>8,876</b>   | <b>9,518</b>  | <b>13,832</b> | <b>11,276</b>        |
| <b>B9: Engine Capacity &gt;500 CC but less than equal to 800 CC</b>                                |               |               |                |               |               |                      |
| Honda Motorcycle & Scooter India Pvt Ltd (XL750)   | 15            | -             | 15             | -             | -             | -                    |
| India Kawasaki Motors Pvt Ltd (Ninja650, Versys 650, Vulcan S                                      | -             | -             | 37             | 32            | -             | -                    |
| Royal-Enfield (Unit of Eicher Motors) (650 Twin, Shotgun, Super                                    | 4,169         | 5,945         | 3,162          | 4,324         | 1,505         | 2,040                |
| Suzuki Motorcycle India Pvt Ltd (DL800DE, GSX-8R)  | -             | 60            | 21             | -             | -             | -                    |
| Triumph Motorcycles India Pvt Ltd (Daytona 660, Street Triple, T                                   | 43            | 5             | 43             | 5             | -             | -                    |
| <b>Total B9</b>  | <b>4,227</b>  | <b>6,010</b>  | <b>3,278</b>   | <b>4,361</b>  | <b>1,505</b>  | <b>2,040</b>         |

| SIAM   |                  |                  |                  |                  |                 |                      |
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|  |                  |                  |                  |                  |                 | Report IV            |
|  |                  |                  |                  |                  |                 | (Number of Vehicles) |
| Category   | Production       |                  | Domestic Sales   |                  | Exports         |                      |
| Segment/Subsegment   | April            |                  | April            |                  | April           |                      |
| Manufacturer   | 2024             | 2025             | 2024             | 2025             | 2024            | 2025                 |
| <b>B10: Engine Capacity &gt;800 CC but less than equal to 1000 CC</b>  |                  |                  |                  |                  |                 |                      |
| India Kawasaki Motors Pvt Ltd (Ninja ZX-10R, Z900)   | 52               | -                | 87               | 114              | -               | -                    |
| Triumph Motorcycles India Pvt Ltd (Boneville T100, Speed Twin  | -                | -                | 66               | 12               | -               | -                    |
| <b>Total B10</b>   | <b>52</b>        | <b>-</b>         | <b>153</b>       | <b>126</b>       | <b>-</b>        | <b>-</b>             |
| <b>B11: Engine Capacity &gt;1000 CC but less than equal to 1600 CC</b>                                       |                  |                  |                  |                  |                 |                      |
| Hero MotoCorp Ltd (Nightster, Pan America, Sportster S)  | -                | -                | 8                | 12               | -               | -                    |
| India Kawasaki Motors Pvt Ltd (Ninja 1100SX, Versys 1100)  | -                | 60               | -                | 39               | -               | -                    |
| Piaggio Vehicles Pvt Ltd (RSV4 Factory)  | -                | -                | 1                | -                | -               | -                    |
| Suzuki Motorcycle India Pvt Ltd (Hayabusa)   | 58               | 9                | 32               | 64               | -               | -                    |
| Triumph Motorcycles India Pvt Ltd (Boneville Bobber, Boneville   | -                | -                | 4                | 15               | -               | -                    |
| <b>Total B11</b>   | <b>58</b>        | <b>69</b>        | <b>45</b>        | <b>130</b>       | <b>-</b>        | <b>-</b>             |
| <b>B12: Engine Capacity &gt;1600 CC</b>  |                  |                  |                  |                  |                 |                      |
| Hero MotoCorp Ltd (Fat Bob, Fat Boy 114, Heritage Classic, Stre  | -                | -                | 11               | 6                | -               | -                    |
| Triumph Motorcycles India Pvt Ltd (Rocket III)   | -                | -                | 17               | 7                | -               | -                    |
| <b>Total B12</b>   | <b>-</b>         | <b>-</b>         | <b>28</b>        | <b>13</b>        | <b>-</b>        | <b>-</b>             |
| <b>Total Motorcycles</b>   | <b>12,98,063</b> | <b>11,66,462</b> | <b>11,28,192</b> | <b>8,71,666</b>  | <b>2,54,744</b> | <b>3,13,008</b>      |
| <b>C: Moped: More than 75 CC to 100 CC and with fixed transmission Ratio, Big wheel size – more than 12"</b> |                  |                  |                  |                  |                 |                      |
| <b>C1: Engine capacity less than or equal 100 CC</b>   |                  |                  |                  |                  |                 |                      |
| TVS Motor Company Ltd (TVS XL)   | 40,229           | 37,771           | 41,924           | 38,748           | 432             | 1,314                |
| <b>Total Mopeds</b>  | <b>40,229</b>    | <b>37,771</b>    | <b>41,924</b>    | <b>38,748</b>    | <b>432</b>      | <b>1,314</b>         |
| <b>Total Two Wheelers</b>  | <b>19,32,986</b> | <b>18,52,866</b> | <b>17,51,393</b> | <b>14,58,784</b> | <b>3,21,050</b> | <b>3,68,201</b>      |
| <b>Quadracycle</b>   |                  |                  |                  |                  |                 |                      |
| Bajaj Auto Ltd (Qute)  | 756              | 211              | 19               | 3                | 664             | 210                  |
| <b>Total Quadracycle</b>   | <b>756</b>       | <b>211</b>       | <b>19</b>        | <b>3</b>         | <b>664</b>      | <b>210</b>           |
| <b>Grand Total</b>   | <b>23,58,611</b> | <b>23,18,882</b> | <b>20,88,932</b> | <b>18,11,876</b> | <b>3,93,758</b> | <b>4,55,330</b>      |
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