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Vol. 24 No. 07 | July 2025

Registered-RNI No. MAHENG/2002/7908

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"Strengthening Domestic Industry is Crucial in the Current Climate of Rising Global Uncertainty"

Jitendra Chopra,
President, Aluminium Extrusion Manufacturers Association of India (ALEMAI)

- **Non Ferrous Precision Tubes - Manufacturing Technology & Applications**
- **IBAAS–IMMT–IIM 2025: Driving Sustainability, Innovation, and Global Collaboration in Aluminium**
- **Performance of Base Metals - July 2025**

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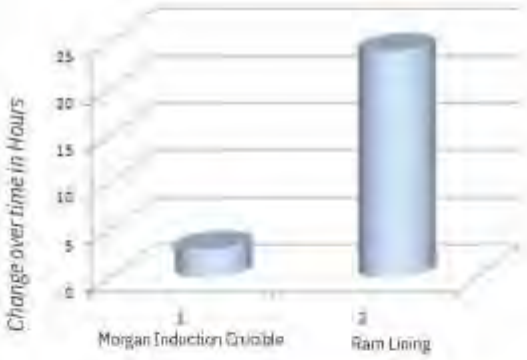

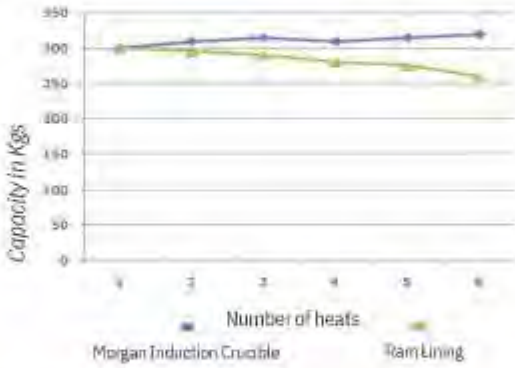

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D. A. Chandekar
Editor

Dear Readers,

India's recent Free Trade Agreement (FTA) with the UK is a strategic move to diversify its trade relationships and reduce reliance on any single market. However, the metal industry, a significant contributor to India's economy, warrants careful consideration. As the agreement aims to eliminate tariffs on a wide range of goods, Indian metal manufacturers may face stiff competition from UK imports. The potential influx of cheap metal and metal products could threaten the survival of domestic industries, particularly small and medium-sized enterprises.

The Indian metal industry has made significant strides in recent years, with the country emerging as a major producer of steel, aluminum, and other metals. However, the industry still faces challenges such as high raw material costs, energy expenses, and global market fluctuations. The FTA with the UK could exacerbate these challenges, especially if domestic manufacturers are not adequately protected. To mitigate this, the Indian government must ensure that the agreement includes safeguards for the metal industry, such as tariff rate quotas or rules of origin, to prevent circumvention of duties.

The FTA also presents opportunities for Indian metal exports to the UK, particularly in niche segments such as specialized steel products or value-added metal goods. To leverage this opportunity, Indian metal manufacturers must focus on improving product quality, reducing costs, and enhancing competitiveness. The government can support this effort by providing incentives for research and development, upgrading infrastructure, and promoting trade facilitation measures. By striking a balance between promoting international trade and protecting domestic interests, India can ensure that the FTA with the UK benefits both nations and contributes to the growth of the metal industry. The success of the agreement will depend on careful implementation, continuous collaboration, and a shared vision for sustainable and inclusive development. As the metal industry is a critical component of India's economy, the government must prioritize its interests and work towards creating a level playing field for domestic manufacturers. By doing so, India can navigate the complexitiesof global trade while safeguarding its metal industry's interests and promoting its growth. The metal industry's resilience and competitiveness will be crucial in determining the success of the FTA and India's position in the global metal market. With careful planning and implementation, the FTA with the UK can be a win-win for both countries, promoting trade and economic cooperation while protecting the interests of domestic industries.

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"Strengthening Domestic Industry is Crucial in the Current Climate of Rising Global Uncertainty"

Jitendra Chopra,

President, Aluminium Extrusion Manufacturers Association of India (ALEMAI)

With over two decades of leadership in the metal and recycling industry, Jitendra Chopra has emerged as a prominent voice in India's aluminium extrusion sector. He is the Owner and Managing Director of Anshima Inc., a leading importer of non-ferrous metal scrap, and Hindustan Metals, a manufacturer of aluminium secondary ingots, ADC 12 alloy ingots, billets, and extruded profiles.

Beyond his entrepreneurial ventures, Chopra also serves as President of ALEMAI (Aluminium Extrusion Manufacturers Association of India), where he spearheads initiatives aimed at industry development, standardization, and global competitiveness. A passionate advocate of sustainability, he is closely associated with the Material Recycling Association of India, promoting circular economy practices and resource efficiency.

Chopra had an exclusive conversation with Metalworld, on the backdrop of their upcoming flagship event '*ALUMEX*' and here are some excerpts from the discussion

Q. What is the vision, mission, and long-term goal of AEMAI as a newly formed industry body?

The aluminium extrusion sector in India has long been fragmented. Major players such as Jindal, Hindalco, and Vedanta have dominated, while many smaller manufacturers operate in regions like Rajkot, Ahmedabad, and Anand. Repeated challenges with government norms — whether related to pollution, GST, or quality standards — made it essential to create a unified platform.

During the COVID-19 crisis, manufacturers came together to support labourers and maintain some stability despite shutdowns. This sense of unity eventually led to the formal establishment of ALEMAI in 2023, which has seen encouraging progress in just two years.

Our vision is to organise the sector, improve growth and quality standards, represent the industry before policymakers, and become export-friendly under the slogan 'Future Ready.' India has an installed extrusion capacity of 30 lakh tonnes, but we are producing only 12–15 lakh tonnes. The rest is being imported, largely because raw material costs are high and Free Trade Agreements have made imports easier. ALEMAI's mission is to reduce this dependence, strengthen local capacity, and improve India's global standing.

Q. How significant is aluminium extrusion for the Indian manufacturing and infrastructure sectors?

Aluminium extrusion is central to multiple industries, from construction and infrastructure to automotive, appliances, and downstream

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manufacturing. Despite this, India still relies heavily on imports. For example, the automobile industry procures nearly 90% of its extrusion components from abroad.

Indian companies are fully capable of supplying this demand at a competitive quality. By supporting them, we can bridge the gap between domestic capacity and actual production, reduce imports, and contribute directly to national GDP growth.

Q. What is the key objective behind organising the ALUMEX show, and how will it benefit the industry?

The ALUMEX exhibition is ALEMAI's flagship initiative to showcase the strength of India's extrusion sector. The upcoming show will span 10,000 sq. metres with about 200 stalls, featuring 75 Indian extrusion manufacturers, alongside American, European, and Chinese machinery makers, chemical suppliers, and raw material providers.

What makes ALUMEX unique is that it is being organised by the industry, for the industry. All proceeds will be reinvested into technical sessions, conferences, and other initiatives to support members. The participation of the Ministry of Mines, MSME, DPIIT, and Jawaharlal Nehru Aluminium Research Institute further validates its importance. Our aim is to make ALUMEX an annual event and a central platform for growth.

Q. How do you see the future of the aluminium extrusion industry in India, both in terms of growth and innovation?

The growth potential is enormous. However, structural issues persist. Currently, Indian producers often export at lower rates while charging higher domestically, whereas China incentivises its downstream industries to expand globally. India must adopt a similar strategy.

By strengthening our downstream industries — furniture, automotive, appliances, and more — we can both meet domestic needs and improve competitiveness abroad. ALEMAI's role is to push for policy reforms, financial restructuring, and global-standard quality improvements so that the Indian extrusion industry can take its rightful place internationally.

Q. What kind of support and policy interventions does AEMAI expect from the government and policymakers to strengthen the industry?

We are urging the government to:

- Restrict unnecessary imports and promote domestic production.
- Make raw material pricing internationally competitive..
- Exclude metals from Free Trade Agreements (FTAs).
- Strengthen the Make in India initiative by focusing not just on large projects, but also on the components and downstream sector.

Every country protects its industries, and India must do the same. Indian manufacturers produce high-quality goods that deserve trust and opportunity. By consuming more local products and reducing import dependence, India can both protect its industries and strengthen its economy.

Through Metalworld, I would like to appeal to policymakers and industry leaders: give Indian manufacturers a fair chance, reduce import reliance, and make the aluminium extrusion sector a global leader.

Non Ferrous Precision Tubes - Manufacturing Technology & Applications

Precision tubes made of aluminum and copper are used in various applications due to their unique properties. Aluminum tubes are favored for their lightweight nature and corrosion resistance, while copper tubes are chosen for their high conductivity and durability. Both materials offer precision in manufacturing, making them suitable for applications requiring tight tolerances and specific dimensions.

Characteristics of Aluminum Precision Tubes:

(a) Lightweight: Aluminum's low density makes it ideal for applications where weight is a concern, such as in the automotive and aerospace industries. (b) Corrosion Resistance: Aluminum naturally forms a protective oxide layer making it resistant to many corrosive environments.

Applications: Aluminum precision tubes are used in heat exchangers, automotive parts, and various industrial applications.

Manufacturing: Precision aluminum tubes can be manufactured using techniques like cold drawing and extrusion, offering tight tolerances and specific shapes.

Characteristics of Copper Precision Tubes:

(a) High Conductivity: Copper's excellent electrical and thermal conductivity makes it suitable for applications like refrigeration, air conditioning, and electrical wiring.(b) Durability: Copper is a strong and durable material, offering long-term reliability.

Applications: Copper precision tubes are commonly used in plumbing, refrigeration systems, air conditioners and heat exchangers.

Manufacturing: Copper tubes can be manufactured using processes like drawing and extrusion, with advanced techniques like planetary rolling for high precision.

Fig.2: Precision Tubes Application

Dhiraj K. Chauhan
Director: METCON-Metallurgical Consultants

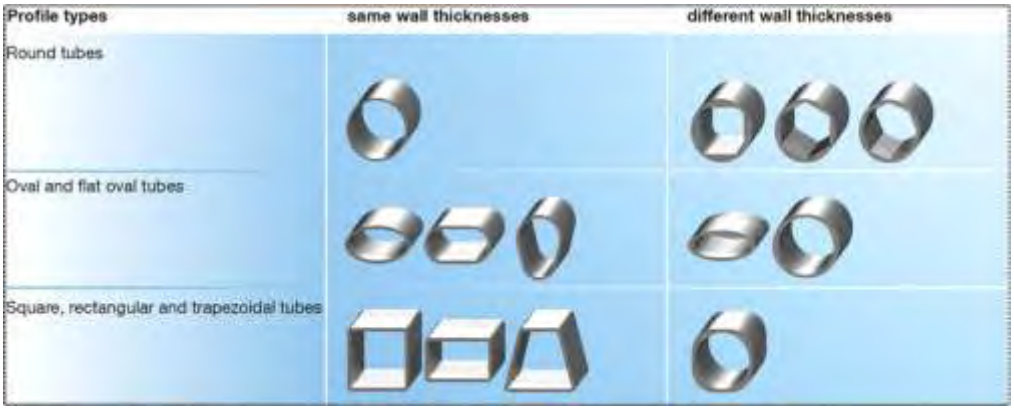

Fig.1: Precision Tubes Profiles

Precision Tube Manufacturing techniques:

Precision tube making relies on advanced technologies that ensure tight dimensional tolerances and high-quality finishes. Key technologies include cold drawing or cold rolling for seamless tubes, high-speed tube mills for welded tubes, and precision tube laser cutting for intricate shapes. Specialized processes like hydroforming and induction hardening further enhance the capabilities of precision tube manufacturing.

1. Cold Drawing/Rolling:

Process: Seamless tubes are produced by drawing or rolling a pre-formed tube through dies to reduce its diameter and wall thickness while maintaining precise dimensions.

Advantages: Produces tubes with very tight tolerances, excellent surface

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2. High-Speed Tube Mills:

Process:

Flat strips are continuously formed into tubes by passing them through a series of rollers and welding the seam using high-frequency induction or other methods.

Advantages:

High-speed production, efficient for large-scale manufacturing.

Applications:

Automotive, construction, furniture, and other industries requiring standard tube shapes and sizes.

Welding Techniques:

High-frequency induction welding is commonly used for its speed and strength, with online testing methods like Eddy Current and UT tests to ensure weld quality.

Fig.3: Precision Tube Rolling Mill

3. Precision Tube Laser Cutting:

Process: A laser beam precisely cuts tubes into

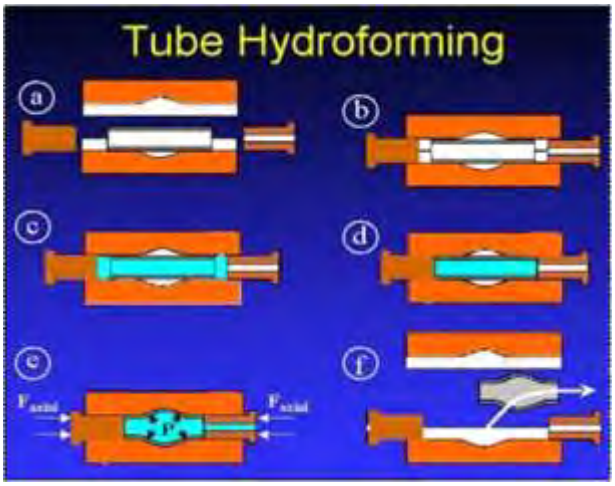

Fig.4: Hydroforming of Tube

complex shapes and patterns.

Advantages: High accuracy, clean cuts, and ability to handle intricate designs.

Applications: Medical devices, aerospace components, and other applications requiring complex geometries.

4. Other Advanced Technologies:

Hydroforming: Uses fluid pressure to shape tubes into complex forms, often used

for producing parts with varying cross-sections.

Seamless aluminum tubes are manufactured using a process called piercing extrusion. In this process, a solid aluminum billetis heated to a high temperature and then forced through a die, which creates a hollow tube. The piercing extrusion process is a complex and precise operation, and there are a number of factors that need to be considered in order to produce a high-quality seamless aluminum tube. These factors include the material properties of the aluminum, the design of the die, and the operating

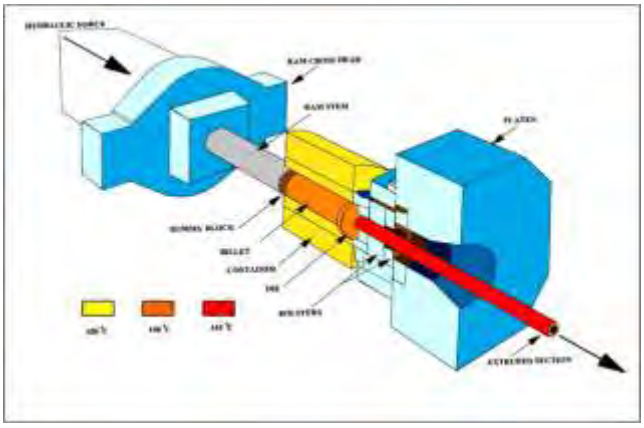

Fig.5: Extrusion of Aluminium Alloy Tube

parameters of the extrusion press. In this article, we will delve into the extrusion process of seamless aluminum tubes, outlining the key steps involved and the additional factors that need to be considered for successful production.

The Main Extrusion Process of Seamless Aluminum Tube:

The main steps involved in the extrusion process of seamless aluminum tubes are as follows:

1) Material preparation:

The first step is to prepare the aluminum billet. The billet is typically made from a high-

quality aluminum alloy that has been heat-treated to improve its strength and ductility. The

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billet is then machined to a precise size and shape to ensure that it will fit properly in the die.
The material properties of the aluminum alloy will affect the ease of extrusion and the final properties of the tube. For example, harder alloys will require higher extrusion pressures and may be more prone to defects.

The size and shape of the billet will also affect the extrusion process. For example, larger billets will require more time and energy to extrude.

2) Heat treatment: The next step is to heat the billet to a high temperature. The temperature of the billet will vary depending on the alloy that is being used. The goal of the heat treatment is to make the aluminum soft and ductile so that it can be easily deformed during the extrusion process. The heat treatment temperature will need to be carefully controlled to ensure that the aluminum is not overheated.

Overheating can cause the aluminum to become brittle and difficult to extrude.

3) Extrusion into modeling:

The billet is then placed in the die and the extrusion press is activated. The press applies a high pressure to the billet, which forces it through the die. The die is shaped to create the desired cross-section of the tube.

The extrusion pressure will need to be carefully controlled to ensure that the aluminum is not deformed too much.
Overextrusion can cause the tube to become thin and weak.

The die design is critical to the success of the extrusion process. The die must be properly shaped to create the desired cross-section of the tube. The die must also be made from a high-quality material that can withstand the high temperatures and pressures of the extrusion process.

4) Cooling: The extruded tube is then cooled to room temperature. The cooling process helps to solidify the aluminum and prevent it from becoming brittle.

The cooling rate will need to be carefully controlled to ensure that the aluminum does not become too brittle. Too rapid cooling can cause the aluminum to become brittle and crack.

5) Finishing: The cooled tube is then finished to remove any burrs or imperfections. The finishing process may involve machining, grinding, or polishing.

The finishing process will help to improve the appearance of the tube and make it more resistant to corrosion.

6) Marking: The finished tube is then marked with the manufacturer's information and other relevant data. The marking process may involve stamping, laser engraving, or hot stamping.
The marking process will help to identify the tube and its manufacturer.

7) Other steps: There are a number of other steps that may be involved in the extrusion process of seamless aluminum tubes. These steps may include annealing, straightening, or heat treatment.

Annealing is a heat treatment process that is used to soften the aluminum and improve its ductility.
Straightening is a process that is used to correct any bends or distortions in the tube. Heat treatment is a process that is used to improve the strength and hardness of the aluminum.

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IBAAS–IMMT–IIM 2025: Driving Sustainability, Innovation, and Global Collaboration in Aluminium

The global aluminium industry is undergoing rapid transformation. With growing demand from infrastructure, automotive, packaging, renewable energy, and aerospace sectors, the focus is shifting towards sustainability, decarbonisation, and technological innovations. Against this backdrop, the IBAAS–IMMT–IIM 2025 International Conference & Exhibition will take place in Bhubaneswar, Odisha, India, from September 24–27, 2025, under the central theme "Sustainability, Decarbonisation and Technological Innovations in Aluminium Industry."

This prestigious event is jointly organised by the International Bauxite, Alumina & Aluminium Society (IBAAS), the Institute of Minerals & Materials Technology (IMMT, Bhubaneswar), and the Indian Institute of Metals (IIM, Bhubaneswar Chapter).

Over the years, IBAAS has emerged as a global platform for knowledge-sharing and collaboration, and the 2025 edition continues that tradition, bringing together researchers, industry leaders, technology providers, and policymakers for four days of presentations, discussions, and exhibitions.

A Platform for Collaboration

The strength of IBAAS lies in its ability to bring together all stakeholders of the aluminium value chain under one roof. Sponsors such as Hindalco, NALCO, Vedanta, and Hindustan Copper Limited underscore the event's industrial significance, while an extensive international exhibition will showcase advanced technologies, machinery, and services for every stage of the aluminium sector. Metalworld and other international media partners ensure visibility across Asia, Europe, the Middle East, and North America.

Dr. Ashok Nandi

President, International Bauxite, Alumina & Aluminium Society (IBAAS)

This broad collaboration reflects the global nature of the aluminium industry, where advances in mining, refining, smelting, downstream processing, and recycling are increasingly interconnected.

Technical Focus: Covering the Full Value Chain

IBAAS-IMMT-IIM 2025 will feature four major technical sessions, each addressing a critical part of the aluminium value chain.

Bauxite and Alumina

As the backbone of the aluminium industry, bauxite and alumina will receive considerable attention.

Presentations will address:

- Exploration and beneficiation of bauxite resources.
- Advanced refining technologies to improve alumina quality.
- Strategies to make lower-grade ores economically viable.
- Environmental and logistical challenges in mining.

With participation from experts across India, Australia, Guinea, and China, the session promises to highlight both global supply dynamics and local resource security issues. For India, which possesses rich bauxite reserves, innovations in beneficiation and refining will be crucial for long-term sustainability and cost

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Aluminium Smelting

Smelting remains the most energy-intensive stage of aluminium production, and the conference will focus on both efficiency and sustainability. Key themes include:

- Energy-efficient cell designs to reduce power consumption.
- Advances in inert anode and low-carbon smelting technologies.
- Innovations in green anode production.
- Integration of renewable energy in smelting operations.

Given India's ambitious aluminium production targets, the adoption of advanced smelting practices is essential. Presentations and case studies will demonstrate how producers can achieve lower costs while meeting increasingly stringent environmental standards.

Aluminium Downstream

The downstream sector — covering extrusion, rolling, recycling, and secondary production — is critical for delivering value-added aluminium products. This session will cover:

- Cutting-edge extrusion and rolling technologies.
- Recycling and remelting practices aligned with circular economy goals.
- Expanding applications in construction, automotive, aerospace, and consumer goods.

Downstream industries represent India's best opportunity to move up the value chain. By strengthening extrusion, rolling, and recycling capacities, India can reduce import dependence while building export competitiveness in high-value aluminium products.

Sustainability, Decarbonisation & Industry 4.0

Sustainability is the unifying theme of IBAAS–IMMT–IIM 2025, and the dedicated session on decarbonisation and Industry 4.0 is expected to be a highlight. Key discussions will include:

- Pathways to low-carbon aluminium and strategies for achieving net-zero targets.
- Case studies of renewable energy integration in aluminium operations.
- The role of digitalisation, AI, and automation in improving process efficiency.
- Circular economy approaches, including aluminium recycling and life-cycle assessments.

This session reinforces aluminium's role as a strategic material for the global energy transition. From lightweight electric vehicles to renewable energy infrastructure, aluminium is central to sustainability, making decarbonisation of its production processes vital for climate commitments.

Special Sessions and Recognition

IBAAS–IMMT–IIM 2025 will also feature panel discussions, policy dialogues, and special sessions designed to encourage interaction between industry leaders, academics, and government representatives. Another highlight will be the ESG Awards, which recognise

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companies and projects that have demonstrated leadership in environmental, social, and governance practices. These awards aim to inspire organisations to view sustainability not just as a regulatory requirement, but as a driver of competitiveness and innovation.

International Participation and Knowledge Exchange

With expected participation from over 20 countries, including strong delegations from India, China, Europe, the Middle East, and North America, IBAAS–IMMT–IIM 2025 is set to be a truly global event. Such international collaboration ensures that participants gain insights not only from local contexts but also from global best practices.

In addition to conference sessions, post-conference technical visits will offer delegates an opportunity to see India's aluminium operations firsthand. These visits will provide practical exposure to new technologies and sustainable practices being implemented in the country.

Preparing the Aluminium Industry for the Future

IBAAS–IMMT–IIM 2025 is more than a conference — it is a roadmap for the industry's future. By covering every stage of the aluminium value chain, the event ensures that upstream challenges, downstream opportunities, and sustainability imperatives are addressed in a holistic manner.

For India, the event is especially significant. With abundant bauxite reserves, growing production capacity, and rising demand in key sectors, India is well-positioned to become a global leader in aluminium. However, achieving this potential requires policy support, technological upgradation, and a stronger focus on downstream value addition.

Globally, the aluminium sector is expected to play a decisive role in enabling clean energy, electric mobility, and circular economy initiatives.

The discussions at IBAAS–IMMT–IIM 2025 will help define how the industry can balance growth with sustainability in an era of rapid change.

Conclusion

By bringing together stakeholders from across the world, IBAAS–IMMT–IIM 2025 will provide a platform to share knowledge, showcase innovations, and shape strategies for the aluminium industry's future. The event's focus on sustainability and decarbonisation reflects the broader transformation taking place in heavy industries worldwide.

With its blend of technical depth, global collaboration, and policy dialogue, the conference will not only highlight the current state of the industry but also set the direction for its next phase of growth. ■

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Performance of Base Metals - July 2025

● ***Overview***

The month of July 2025 offered a relatively stable yet nuanced performance across base metals. While price movements on the London Metal Exchange (LME) remained modest, Shanghai Metals Market (SMM) reported notable shifts in Chinese production patterns, and the Multi Commodity Exchange of India (MCX) reflected a cautious but consistent hedging environment.

Together, these three perspectives highlight the global–regional–local chain: LME sets the international benchmark, SMM reflects the manufacturing engine of China, and MCX reveals the pulse of the Indian market. Analysing all three in tandem gives a well-rounded view of where the aluminium, copper, zinc, lead, and nickel sectors stand midway through 2025.

● LME (London Metal Exchange): Modest Mid-Year Moves

The LME, as the global benchmark for base metal pricing, recorded small but telling movements in July 2025.

● ***Copper:*** Closed at US$ 9,898/tonne, up by US$ 31. The steady rise in copper reflects its continued demand in the energy transition — from EV wiring to renewable power grids. Even modest increases are significant, as copper is viewed as the "barometer" of global economic activity.

● ***Aluminium:*** Finished at US$ 2,652/tonne, up US$ 11. Aluminium prices are closely linked to construction and transport demand. The gain, though mild, suggests resilience despite higher production in China (discussed below).

● ***Zinc:*** At US$ 2,853.5/tonne, up US$ 9, zinc benefitted from infrastructure spending and steel galvanization demand.

● ***Lead:*** Edged down slightly to US$ 2,014.5/tonne, reflecting soft demand in the battery sector, where substitution and recycling trends continue to put pressure.

Overall, LME's July picture indicates steady but unspectacular growth, a reflection of balanced supply-demand forces and cautious investor sentiment amidst uncertain global economic signals.

Metalworld
Research Team

Graph : LME Base Metal Price Change (%) – July 2025

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● ***SMM (Shanghai Metals Market):*** Production-Focused Insights

China remains the world's largest consumer and producer of base metals, making SMM's production data a vital leading indicator. July 2025 saw divergent movements across metals:

● ***Copper cathode:*** Production grew +3.47% MoM and +14.21% YoY, with operating rates at 88.19%. This is a clear indicator of strong domestic demand, supported by China's investment in power and electronics sectors.

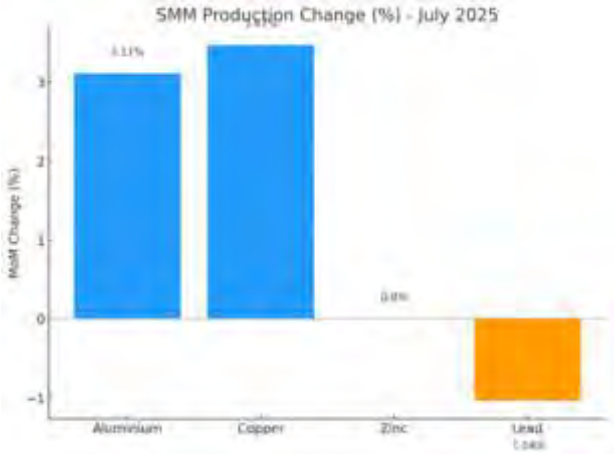
● ***Aluminium:*** Output rose +3.11% MoM, while casting ingot production surged by +11.89% MoM, showing a healthy expansion in supply for downstream applications.

● Lead: Fell –1.04% MoM, though still up +5.43% YoY. The dip highlights challenges in the lead market, particularly linked to weaker demand in traditional automotive batteries.

● Electrolytic manganese metal (EMM): Continued to decline, suggesting subdued demand in specialty alloys.

§ The July data highlights China's dual-track approach — expanding strategic metals like copper and aluminium while easing output in areas with oversupply. For the global market, this means increased export availability in some metals but tighter balances in others.

Graph : SMM Base Metal Production Change (%) – July 2025



Note on Data Availability: *Publicly released SMM data for July 2025 covers Copper, Aluminium, Lead, and Manganese. Figures for Zinc and Nickel were not disclosed, hence shown as N/A.*

● ***MCX (Multi Commodity Exchange of India):*** Hedging in Play

MCX provides a critical window into India's metals market, where futures trading allows manufacturers, traders, and investors to manage price risks. July 2025 was marked by measured activity as contracts approached expiry.

● Aluminium futures traded around ₹253/kg, registering a +0.06% change, suggesting stability amid rising imports and domestic cost pressures.

● Copper futures averaged ₹892/kg, with a modest ~+1.0% gain, in line with global cues from LME. This reflects steady demand in India's infrastructure and electrical sectors.

● Zinc, Lead, Nickel: Detailed percentage change data was not publicly available, though contracts remained active until expiry on 31 July 2025.

The role of MCX here is critical — even small percentage changes highlight how Indian manufacturers are using futures to hedge against volatile global conditions, particularly with fluctuating raw material costs.

Graph : MCX Futures Price Change (%) – July 2025

Note on Data Availability: *Public sources provide indicative MCX price levels for Aluminium and Copper. Detailed July 2025 percentage change data for Zinc, Lead, and Nickel was not available in the public domain, hence marked as N/A.*

Metal	LME (Price Move)	SMM (Production MoM)	MCX (Trading Activity)
Aluminium	+US$11	+3.11%	+0.06% (₹253/kg)
Copper	+US$31	+3.47%	+1.0% (~₹892/kg)
Lead	–US$0.5	–1.04%	N/A
Zinc	+US$9	N/A	N/A
Nickel	Stable	N/A	N/A

Side-by-Side Snapshot: July 2025

Note on Data Availability: *N/A values in the table reflect unreported figures for July 2025, not editorial oversight. These gaps arise because certain exchanges / platforms (SMM, MCX) did not release public data for specific metals.*

● Key Takeaways

● ***Copper's Strength as a Global Driver:***

Copper's resilience across LME, SMM, and MCX underscores its central role in electrification and renewable energy. Growth in Chinese cathode production and firm demand in India align with broader decarbonisation trends.

● ***Aluminium's Mixed Story:***

While prices edged higher on LME and output expanded in China, India's flat MCX futures show that domestic challenges — high energy costs and reliance on imports — remain constraints. This disconnect is critical for policymakers to address.

● ***Lead's Weakness:***

Lead's dip on LME and reduced output in China reflect a structural issue: the global shift away from lead-acid batteries. This suggests the industry may face long-term demand erosion unless new applications emerge.

● ***Zinc's Modest Recovery:***

The small but positive gain on LME shows that zinc continues to benefit from construction and galvanisation. However, the lack of production reporting from China makes it harder to gauge global balances.

● ***Nickel's Data Gap:***

Nickel remains strategically important for EV batteries and stainless steel, but with limited July reporting, the global outlook remains speculative. This highlights the need for better transparency in regional markets.

● ***Final Word***

The July 2025 performance across LME, SMM, and MCX paints a picture of stability with underlying challenges. Copper and aluminium remain the bright spots, while lead continues to struggle. India, through MCX, is actively engaging with global price trends, but domestic policy reforms are essential to reduce import dependence and build local resilience.

Editor's Note: *All figures and percentage changes are based on publicly available data as of July 2025 from LME, SMM, and MCX sources. Where figures are marked N/A, the respective exchange/platform did not release data for that category in the public domain.*

Casting a Stronger Future: Foseco India Acquires 75% Morganite Crucible India stake

Foseco India Limited (FIL), part of the global Vesuvius Group, has signed an agreement to acquire a 75% stake in Morganite Crucible (India) Limited (MCIL) from its promoters, Morganite Crucible Limited and Morgan Terrassen BV of the UK-based Morgan Group. The acquisition will be done through a share swap, where FIL will issue 1.15 million new shares at a ratio of 274 FIL shares for every 1,000 MCIL shares. After this, FIL will also make a mandatory open offer to buy up to 25% of MCIL shares from public shareholders, as per SEBI regulations. The deal is expected to close by October 2025, subject to approvals.

MCIL runs the Molten Metal Systems (MMS) business in India, known for advanced crucibles used to melt non-ferrous metals like aluminium, copper, and zinc. By adding MMS to its portfolio, Foseco India will strengthen its offerings in the fast-growing non-ferrous foundry sector.

Foseco India, operating since 1958, has plants in Pune and Puducherry and an R&D centre. The company is known for products that help foundries reduce defects, improve safety, and adopt sustainable practices. This move is part of a global deal, under which the Vesuvius Group is acquiring MMS worldwide from the Morgan Group. Industry experts say the acquisition will give Foseco India global R&D support, a broader product range, and stronger leadership in one of the world's most dynamic foundry markets.

India's Copper Market Faces Pressure Under New Quality Rules

Trade body warns of shortages as compliance costs weigh on foreign suppliers

India's new quality control order (QCO) on copper cathodes has triggered concerns over supply shortages in the domestic market, according to the Bombay Metal Exchange (BME). The industry body argues that the regulation places "costly and unnecessary compliance burdens" on foreign suppliers, reducing the availability of copper in India. The order, introduced in December 2023, mandates that both domestic and overseas suppliers obtain certification from the Bureau of Indian Standards (BIS) to ensure quality checks on imported copper cathodes. Since its introduction, imports have slowed, claims the BME—a view contested by the government. "With domestic licensees unable or unwilling to supply the market and unreliable foreign alternatives, the downstream sector faces real and immediate shortages," the BME said in a statement

India is the world's second-largest importer of refined copper, with Japan accounting for nearly two-thirds of shipments, followed by Tanzania and Mozambique. But the BME warns that compliance costs may prompt Japanese suppliers to exit the Indian market. As of June, 10 foreign suppliers had secured certification under the new rules—seven from Japan, two from Malaysia, and one from Austria. However, the BME says that four of these do

not supply copper cathodes at all, offering only ingots or semi-finished products. Adding to the challenge, all five domestic licensees are using their copper cathodes entirely for captive consumption, leaving little available for wider industry use.

India's federal Ministry of Mines has defended the QCO in court against petitions filed by the BME and the Bombay Non-Ferrous Metals Association, saying the regulation prevents substandard imports and strengthens domestic quality standards. Japanese trading house Marubeni, which supported six Japanese smelters during licensing, also stated that "no particular issues have arisen concerning supply to India."

Copper is one of 30 minerals India designated as 'critical' in 2023, with demand projected to double by 2030 driven by automotive, renewable energy, construction, and power transmission sectors. Major domestic producers include Hindalco Industries and state-owned Hindustan Copper, but India remains import-dependent. If foreign suppliers scale back participation, industry players warn of price instability and raw material shortages, potentially straining downstream manufacturers and slowing progress in India's energy transition plans.

HINDUSTAN ZINC Bets Big on Waste-to-Metal with $438m Investment

New facility to recover metals from waste dumps, part of capacity expansion strategy

Hindustan Zinc Ltd (HZL), India's largest zinc producer, will invest ₹38.23 billion ($437.5 million) to set up a metals

reprocessing plant as part of its long-term capacity expansion strategy. The facility, with a capacity of 10 million tonnes per annum, will be designed to extract residual metal from tailing dumps—waste material generated after ores are processed. By recovering metals from these dumps, HZL aims to significantly improve overall mineral recovery rates and move closer to its goal of doubling annual production capacity to 2 million tonnes. The project comes on the heels of the company's $1.39 billion investment plan announced in June 2025 to build a new integrated metals complex in Rajasthan, where HZL already operates a major smelter. Together, the investments underline the company's aggressive expansion drive to meet rising domestic and global demand for zinc and other non-ferrous metals.

India accounts for nearly 6% of global zinc production, and HZL—controlled by Vedanta Resources—is a dominant player in the domestic market. With infrastructure growth, automotive manufacturing, and renewable energy driving demand, zinc is increasingly critical for galvanising steel, protecting it from corrosion. Globally, miners are under pressure to adopt sustainable practices and improve recovery from waste streams. HZL's move into large-scale reprocessing aligns with this trend, reducing environmental impact while unlocking untapped value from mining by-products.

For India's metals sector, the project signals two key shifts:

- Resource optimisation: Recycling tailings can reduce the need for fresh ore mining, extending the life of existing reserves.
- Capacity leadership: With planned expansions, HZL is positioning itself not only as India's zinc leader but also as a global top-tier producer.

Industry analysts say that if successfully executed, HZL's reprocessing initiative could become a benchmark in sustainable mining for the region.

Copper Market Steady as Demand-Supply Balances Shift

Market supported by infrastructure spending, inventory drawdowns, and macro tailwinds

Copper prices on the London Metal Exchange (LME) closed slightly higher last week, buoyed by stronger demand signals from China, tightening supply from South America, and improving macroeconomic conditions in the U.S. and Europe. The benchmark 3-month copper contract settled at $9,810/t on August 23, up from $9,750/t a week earlier. Market participants noted that while gains were modest, prices remain comfortably above the $9,800/t mark, reflecting a resilient demand–supply balance.

LME inventories eased to 155,800 tonnes on August 23, down from 156,350 tonnes two days earlier. Although still above early-summer levels, the drawdown underscores steady physical demand. In China—the world's top copper consumer—optimism strengthened following the government's approval of a RMB 200 billion ($27 billion) infrastructure package, focusing on power grids and transport projects. Refined copper imports rose 8% year-on-year in July to 503,000 tonnes, confirming a rebound in demand from the downstream manufacturing and construction sectors.

Spot treatment and refining charges (TC/RCs) in Asia slipped below $50/t ($0.05/lb), compared to around $60/t in July. Lower TC/RCs typically signal tighter concentrate availability, putting pressure on smelters. Chile, the world's largest producer, reported July output down 4% year-on-year, citing weather disruptions and operational bottlenecks. Peru, the second-largest exporter, also faced production challenges, compounding the supply squeeze.

Outside Asia, sentiment improved on the back of encouraging macroeconomic indicators. In the U.S., softer inflation data raised expectations that the Federal Reserve may adopt a less restrictive stance later in 2025, supporting risk appetite across commodities. In Europe, Germany's manufacturing PMI ticked higher, suggesting early signs of stabilization in industrial activity after a prolonged contraction. Analysts expect copper prices to remain in the $9,700–$9,900/t range in the near term, with potential upside if inventories continue to decline. With Chinese demand accelerating and Latin American supply under strain, market watchers see the medium-term outlook as bullish but volatile, particularly as global monetary policy and energy costs remain key variables.

Indian automobile sector records stable sales in July: SIAM

Indian Automobile industry sales posted a "stable performance" in July this year, across all segments including passenger vehicles (cars and utility vehicles), two-wheelers, three-wheelers and quadricycle, to cross a total of 26.98 lakh units during the month, according to a Society of Indian Automobile Manufacturers (SIAM) statement released recently.

The two-wheeler segment dispatches grew by 8.7 per cent in July 2025, as compared to July 2024, with sales surpassing 15.67 lakh units. Scooter sales grew by 16.2 per cent to 6,43,169 in July as compared with 5,53,642 units in the corresponding month last year. Similarly, motorcycle sales grew by 4.7 per cent to 8,90,107 units during the month as compared with 8,50,489 units in July 2024. The tractor vehicle sales data for July also showed subdued demand for the month from the agri segment.

The three-wheeler segment posted its highest-ever July sales at 0.69 lakh units, which represents a growth of 17.5 per cent as compared to the same month of the previous year.

However, the overall sentiment in the passenger vehicle segment, comprising cars and utility vehicles, has remained subdued so far, with a marginal de-growth of (-) 0.2 per cent at 3,40,772 units in July 2025, hit by muted demand. Passenger vehicle wholesales stood at 3,41,510 units in July 2024.

Domestic Sales:

- Passenger Vehicles2 sales were 3,40,772 units in July 2025.
- Three-wheeler sales were 69,403 units in July 2025
- Two-wheeler sales were 15,67,267 units in July 2025.

Commenting on July-2025 performance, Rajesh Menon, Director General, SIAM said, "All vehicle segments posted stable performance in July 2025, though overall sentiments in the Passenger Vehicles segment has remained subdued so far which de-grew marginally by (-) 0.2%, as compared to July of 2024, posting sales of 3.41 Lakh units in July 2025. Three Wheelers posted their highest ever sales of July in 2025 of 0.69 Lakh units, with a growth of 17.5% as compared to July 2024. Two-Wheeler segment grew by 8.7% in July 2025, as compared to July 2024, with sales of 15.67 Lakh units. With the advent of the festive season beginning with Onam festivities in the latter part of August, the Indian Auto Industry remains cautiously optimistic for the demand momentum to pick up in the coming months."

Society of Indian Automobile Manufacturers

Domestic Sales: Monthly

Category	Domestic Sales (In Nos.)		
Segment/Subsegment	July		
	2024	2025	% Change
Total Passenger Vehicles[2]	**3,41,510**	**3,40,772**	**-0.2%**
Three Wheelers			
Passenger Carrier	48,331	58,693	21.4%
Goods Carrier	8,312	9,194	10.6%
E-Rickshaw	2,253	1,053	-53.3%
E-Cart	177	463	161.6%
Total Three Wheelers	**59,073**	**69,403**	**17.5%**
Two Wheelers			
Scooters	5,53,642	6,43,169	16.2%
Motorcycles	8,50,489	8,90,107	4.7%
Mopeds	37,563	33,991	-9.5%
Total Two Wheelers	**14,41,694**	**15,67,267**	**8.7%**
Quadricycle	19	-	-

[2]BMW, Mercedes, JLR & Volvo Auto data are not available. Tata Motors Domestic Sales data included only in "Total PV", detailed break-up is not available. However, without Tata Motors, Total PV would be [illegible] for July 2024 and [illegible] for July 2025

SIAM

Segment wise Comparative Production, Domestic Sales & Exports data for the month of July 2025

(Number of Vehicles)

Category / Segment/Subsegment	Production July		Domestic Sales July			Exports July					
	2024		2025	% Change	2024	2025	% Change	2024	2025	% Change
Passenger Vehicles*										
Passenger Cars	1,49,410		1,43,844	-3.7%	96,652	96,147	-0.5%	33,184	36,184	9.0%
Utility Vehicles	2,34,747		2,40,617	2.5%	1,88,217	1,92,763	2.4%	28,094	30,356	8.1%
Vans		13,697	13,610	-0.6%	11,916	12,341	3.6%	651	752	15.5%
Total Passenger Vehicles	**3,97,854**		**3,98,071**	**0.1%**	**2,96,785**	**3,01,251**	**1.5%**	**61,929**	**67,292**	**8.7%**
Three Wheelers										
Passenger Carrier		79,415	1,00,522	26.6%	48,331	58,693	21.4%	26,835	39,140	45.9%
Goods Carrier		8,721	10,069	15.5%	8,312	9,194	10.6%	239	647	170.7%
E-Rickshaw		2,153	1,025	-52.4%	2,253	1,053	-53.3%	-	-	-
E-Cart		216	625	189.4%	177	463	161.6%	-	-	-
Total Three Wheelers		**90,505**	**1,12,241**	**24.0%**	**59,073**	**69,403**	**17.5%**	**27,074**	**39,787**	**47.0%**
Two Wheelers										
Scooters	6,54,748		7,11,216	8.6%	5,53,642	6,43,169	16.2%	50,026	59,086	18.1%
Motorcycles	12,49,903		14,30,344	14.4%	8,50,489	8,90,107	4.7%	2,73,838	3,69,747	35.0%
Mopeds		43,572	46,307	6.3%	37,563	33,991	-9.5%	1,044	5,040	382.8%
Total Two Wheelers	**19,48,223**		**21,87,867**	**12.3%**	**14,41,694**	**15,67,267**	**8.7%**	**3,24,908**	**4,33,873**	**33.5%**
Total Quadricycle		**556**	**340**	**-38.8%**	**19**	**-**	**-100.0%**	**720**	**330**	**-54.2%**
Grand Total	**24,37,138**		**26,98,519**	**10.7%**	**17,97,571**	**19,37,921**	**7.8%**	**4,14,631**	**5,41,282**	**30.5%**

* BMW, Mercedes, JLR, Tata Motors and Volvo Auto data are not available

Society of Indian Automobile Manufacturers (14/08/2025)

SIAM

Summary Report: Cumulative Production, Domestic Sales & Exports data for the period of April-July 2025

Report I

(Number of Vehicles)

Category / Segment/Subsegment	Production April-July		Domestic Sales April-July			Exports April-July					
	2024-25		2025-26	% Change	2024-25	2025-26	% Change	2024-25	2025-26	% Change
Passenger Vehicles*										
Passenger Cars	5,85,138		5,53,900	-5.3%	4,37,945	3,99,138	-8.9%	1,34,079	1,39,952	4.4%
Utility Vehicles	9,62,031		10,33,568	7.4%	8,34,011	8,63,019	3.5%	1,05,769	1,28,355	21.4%
Vans	54,209		54,977	1.4%	50,835	50,976	0.3%	2,564	3,315	29.3%
Total Passenger Vehicles	**16,01,378**		**16,42,445**	**2.6%**	**13,22,791**	**13,13,133**	**-0.7%**	**2,42,412**	**2,71,622**	**12.0%**
Three Wheelers										
Passenger Carrier	2,79,646		3,26,396	16.7%	1,81,939	1,94,564	6.9%	97,315	1,33,997	37.7%
Goods Carrier	38,007		37,974	-0.1%	35,159	35,190	0.1%	1,040	1,586	52.5%
E-Rickshaw	5,554		3,491	-37.1%	5,972	3,646	-38.9%	-	-	-
E-Cart	1,029		1,114	8.3%	1,084	1,214	12.0%	-	-	-
Total Three Wheelers	**3,24,236**		**3,68,975**	**13.8%**	**2,24,154**	**2,34,614**	**4.7%**	**98,355**	**1,35,583**	**37.9%**
Two Wheelers										
Scooters	24,47,009		26,06,966	6.5%	22,18,636	23,04,921	3.9%	2,06,006	2,03,733	-1.1%
Motorcycles	51,94,451		53,23,304	2.5%	40,48,411	37,93,556	-6.3%	10,40,226	13,58,796	30.6%
Mopeds	1,65,949		1,58,583	-4.4%	1,60,278	1,43,352	-10.6%	1,824	8,286	354.3%
Total Two Wheelers	**78,07,409**		**80,88,853**	**3.6%**	**64,27,325**	**62,41,829**	**-2.9%**	**12,48,056**	**15,70,815**	**25.9%**
Total Quadricycle	**2,699**		**1,279**	**-52.6%**	**98**	**4**	**-95.9%**	**2,634**	**1,296**	**-50.8%**
Grand Total	**97,35,722**		**1,01,01,552**	**3.8%**	**79,74,368**	**77,89,580**	**-2.3%**	**15,91,457**	**19,79,316**	**24.4%**

* BMW, Mercedes, JLR, Volvo Auto data is not available and Tata Motors data is available for Apr-June only

Society of Indian Automobile Manufacturers (14/08/2025)

SIAM

Category & Company wise Summary Report for the month of July 2025 and Cumulative for April-July 2025

Report II

(Number of Vehicles)

Category / Segment/Subsegment / Manufacturer	Production July	Domestic Sales April-July		Exports							
				July	April-July	July	April-July				
	2024	2025		2024-25	2025-26	2024	2025	2024-25	2025-26	2024	2025	2024-25	2025-26
Passenger Vehicles													
FCA India Automobiles Pvt Ltd	772	456		2,081	1,848	273	225	1,272	942	428	309	704	975
Force Motors Ltd	305	98		746	522	162	155	594	566	10	-	10	6
Honda Cars India Ltd	8,070	8,336		33,210	23,636	4,624	4,050	18,601	15,978	2,710	3,474	20,719	7,526
Hyundai Motor India Ltd	72,204	65,500		2,55,580	2,50,500	49,013	43,973	1,98,468	1,76,232	15,550	16,100	58,150	64,240
Isuzu Motors India Pvt Ltd	43	45		313	91	22	27	131	91	-	-	-	-
JSW MG Motor India Pvt Ltd	1,992	771		9,336	3,736	2,900	643	11,671	3,796	-	-	-	-
Kia India Pvt Ltd	25,503	21,910		88,208	96,648	20,507	22,135	81,275	88,698	2,505	2,590	10,218	8,602
Mahindra & Mahindra Ltd	43,188	49,838		1,68,968	2,13,561	41,623	49,871	1,65,871	2,01,938	389	964	2,685	6,914
Maruti Suzuki India Ltd	1,82,841	1,83,285		6,70,060	6,78,927	1,37,463	1,37,776	5,56,577	5,31,348	23,896	31,382	93,858	1,27,563
Nissan Motor India Pvt Ltd	9,393	10,030		31,204	35,625	1,995	1,420	8,717	5,912	4,373	4,181	17,182	20,581
PCA Motors Pvt. Ltd	253	131		1,559	1,103	335	494	1,593	1,776	513	978	1,901	2,299
Renault India Pvt Ltd	6,380	5,003		16,177	10,978	2,832	2,575	13,801	10,304	78	1,383	2,337	4,099
SkodaAuto India Pvt Ltd	1,786	6,022		9,396	25,193	2,103	5,554	10,132	24,610	114	77	510	322
Tata Motors Ltd*	NA	NA		1,48,081	1,37,076	NA	NA	1,43,232	1,29,369	NA	NA	632	1,035
Toyota Kirloskar Motor Pvt Ltd	35,304	37,152		1,27,793	1,29,044	29,526	29,141	97,867	1,09,573	2,123	3,448	6,953	9,944
Volkswagen India Pvt Ltd	9,820	9,494		38,666	33,957	3,407	3,212	12,989	12,000	9,240	2,406	26,553	17,516
Total Passenger Vehicles	**3,97,854**	**3,98,071**		**16,01,378**	**16,42,445**	**2,96,785**	**3,01,251**	**13,22,791**	**13,13,133**	**61,929**	**67,292**	**2,42,412**	**2,71,622**

* Only cumulative data is available for Apr-June

NA= Not Available

SIAM

Category & Company wise Summary Report for the month of July 2025 and Cumulative for April-July 2025

Report II

(Number of Vehicles)

Category / Segment/Subsegment / Manufacturer	Production July	Domestic Sales April-July		Exports							
				July	April-July	July	April-July				
	2024	2025		2024-25	2025-26	2024	2025	2024-25	2025-26	2024	2025	2024-25	2025-26
Three Wheelers													
Atul Auto Ltd	2,533	3,027		10,009	10,279	2,253	2,500	8,501	8,795	319	217	722	854
Bajaj Auto Ltd	61,583	71,128		2,07,172	2,27,499	42,131	43,864	1,50,176	1,49,324	13,758	25,559	54,859	81,575
Baxy Ltd	347	307		1,498	943	501	325	1,665	1,022	-	20	-	60
Force Motors Ltd	-	-		672	-	-	-	-	-	-	-	518	-
Mahindra & Mahindra Ltd	3,189	8,782		21,129	30,410	3,593	9,475	21,244	30,034	-	85	252	257
Piaggio Vehicles Pvt Ltd	8,142	9,773		37,383	34,341	7,653	7,513	32,559	27,277	834	1,347	4,320	6,062
Pinnacle Mobility Solutions Pvt Ltd	-	42		-	64	-	6	-	12	-	-	-	-
TI Clean Mobility Pvt Ltd	498	796		2,364	2,165	641	719	2,404	2,385	-	-	-	2
TVS Motor Company Ltd	14,213	18,386		44,009	63,274	2,301	5,001	7,605	15,765	12,163	12,559	37,684	46,773
Total Three Wheelers	**90,505**	**1,12,241**		**3,24,236**	**3,68,975**	**59,073**	**69,403**	**2,24,154**	**2,34,614**	**27,074**	**39,787**	**98,355**	**1,35,583**
Two Wheelers													
Ather Energy Pvt. Ltd	11,097	16,148		36,563	62,647	11,088	15,096	34,904	62,003	40	240	80	382
Bajaj Auto Ltd	3,07,861	3,15,459		12,36,529	12,74,816	1,68,847	1,39,279	7,51,344	6,68,623	1,28,694	1,56,968	4,97,114	5,76,415
Hero MotoCorp Ltd	4,23,096	5,32,997		19,31,927	18,93,239	3,47,535	4,12,397	18,31,897	17,15,054	22,739	37,358	73,731	1,01,774
Honda Motorcycle & Scooter India Pvt Ltd	5,40,885	5,11,134		20,52,628	20,08,130	4,39,118	4,66,331	18,53,350	16,95,324	43,982	49,047	1,82,542	1,95,206
India Kawasaki Motors Pvt Ltd	329	248		932	737	254	192	1,321	1,604	-	-	-	-
India Yamaha Motor Pvt Ltd	86,342	80,789		3,33,757	2,96,330	55,838	50,365	2,41,629	1,87,694	19,666	29,972	79,082	1,14,159
Okinawa Autotech Pvt. Ltd	134	-		243	32	40	-	132	33	-	-	-	-
Piaggio Vehicles Pvt Ltd	4,492	3,882		21,559	19,053	2,848	2,522	12,283	10,572	2,192	856	9,673	8,290
Royal-Enfield (Unit of Eicher Motors)	92,200	1,13,593		3,36,319	3,85,261	61,208	76,254	2,65,894	3,05,033	6,057	11,791	28,278	48,540
Suzuki Motorcycle India Pvt Ltd	1,19,703	1,28,541		4,22,433	4,56,788	1,00,602	96,029	3,51,787	3,72,957	16,112	17,571	64,103	77,731
Triumph Motorcycles India Pvt Ltd	31	8		133	51	66	82	411	266	-	-	-	-
TVS Motor Company Ltd	3,62,053	4,85,068		14,34,386	16,91,769	2,54,250	3,08,720	10,82,573	12,22,666	85,426	1,30,070	3,13,453	4,48,318
Total Two Wheelers	**19,48,223**	**21,87,867**		**78,07,409**	**80,88,853**	**14,41,694**	**15,67,267**	**64,27,325**	**62,41,829**	**3,24,908**	**4,33,873**	**12,48,056**	**15,70,815**
Quadricycle													
Bajaj Auto Ltd	556	340		2,699	1,279	19	-	98	4	720	330	2,634	1,296
Total Quadricycle	**556**	**340**		**2,699**	**1,279**	**19**	**-**	**98**	**4**	**720**	**330**	**2,634**	**1,296**
Grand Total	**24,37,138**	**26,98,519**		**97,35,722**	**1,01,01,552**	**17,97,571**	**19,37,921**	**79,74,368**	**77,89,580**	**4,14,631**	**5,41,282**	**15,91,457**	**19,79,316**

Society of Indian Automobile Manufacturers (14/08/2025)

Statistics

SIAM

Segment & Company wise Production, Domestic Sales & Exports Report for the month of July 2025 and Cumulative for April-July 2025

Report III

(Number of Vehicles)

Category	Production	Domestic Sales			Exports							
Segment/Subsegment	July	April-July	July	April-July	July	April-July						
Manufacturer	2024	2025	2024-25	2025-26	2024	2025	2024-25	2025-26	2024	2025	2024-25	2025-26
Passenger Vehicles												
A: Passenger Cars												
Honda Cars India Ltd	4,318	5,423	14,969	15,326	3,284	2,655	11,826	10,552	268	1,212	7,618	2,586
Hyundai Motor India Ltd	31,925	26,803	1,09,312	1,07,928	16,037	12,418	64,747	54,146	12,297	13,126	47,178	54,026
Maruti Suzuki India Ltd	97,267	99,434	3,69,854	3,54,475	69,245	72,662	2,91,438	2,71,261	9,551	17,035	45,752	60,060
Nissan Motor India Pvt Ltd	6,039	2,793	15,412	9,453	-	-	-	-	4,334	2,086	13,500	7,793
Renault India Pvt Ltd	2,007	1,981	4,517	3,941	565	265	2,888	1,849	40	916	905	2,050
SkodaAuto India Pvt Ltd	1,060	892	4,650	3,473	793	1,170	4,832	4,053	-	-	10	3
Tata Motors Ltd*	NA	NA	40,938	35,496	NA	NA	37,578	32,801	NA	NA	575	548
Toyota Kirloskar Motor Pvt Ltd	140	284	566	960	4,962	5,180	18,421	17,589	-	-	-	-
Volkswagen India Pvt Ltd	6,654	6,234	24,920	22,848	1,766	1,797	6,215	6,887	6,694	1,809	18,541	12,886
Total A: Passenger Cars	**1,49,410**	**1,43,844**	**5,85,138**	**5,53,900**	**96,652**	**96,147**	**4,37,945**	**3,99,138**	**33,184**	**36,184**	**1,34,079**	**1,39,952**
B: Utility Vehicles												
FCA India Automobiles Pvt Ltd	772	456	2,081	1,848	273	225	1,272	942	428	309	704	975
Force Motors Ltd	305	98	746	522	162	155	594	566	10	-	10	6
Honda Cars India Ltd	3,752	2,913	18,241	8,310	1,340	1,395	6,775	5,426	2,442	2,262	13,101	4,940
Hyundai Motor India Ltd	40,279	38,697	1,46,268	1,42,572	32,976	31,555	1,33,721	1,22,086	3,253	2,974	10,972	10,214
Isuzu Motors India Pvt Ltd	43	45	313	91	22	27	131	91	-	-	-	-
JSW MG Motor India Pvt Ltd	1,992	771	9,336	3,736	2,900	643	11,671	3,796	-	-	-	-
Kia India Pvt Ltd	25,503	21,910	88,208	96,648	20,507	22,135	81,275	88,698	2,505	2,590	10,218	8,602
Mahindra & Mahindra Ltd	43,188	49,838	1,68,903	2,13,561	41,623	49,871	1,65,871	2,01,938	389	964	2,610	6,904
Maruti Suzuki India Ltd	71,877	70,241	2,51,094	2,75,431	56,302	52,773	2,19,432	2,14,641	13,694	13,595	45,671	64,263
Nissan Motor India Pvt Ltd	3,354	7,237	15,792	26,172	1,995	1,420	8,717	5,912	39	2,095	3,682	12,788
PCA Motors Pvt. Ltd	253	131	1,559	1,103	335	494	1,593	1,776	513	978	1,901	2,299
Renault India Pvt Ltd	4,373	3,022	11,660	7,037	2,267	2,310	10,913	8,455	38	467	1,432	2,049
SkodaAuto India Pvt Ltd	726	5,130	4,746	21,720	1,310	4,384	5,300	20,557	114	77	500	319
Tata Motors Ltd*	NA	NA	1,02,111	95,624	NA	NA	1,00,526	91,038	NA	NA	3	422
Toyota Kirloskar Motor Pvt Ltd	35,164	36,868	1,27,227	1,28,084	24,564	23,961	79,446	91,984	2,123	3,448	6,953	9,944
Volkswagen India Pvt Ltd	3,166	3,260	13,746	11,109	1,641	1,415	6,774	5,113	2,546	597	8,012	4,630
Total B: Utility Vehicles	**2,34,747**	**2,40,617**	**9,62,031**	**10,33,568**	**1,88,217**	**1,92,763**	**8,34,011**	**8,63,019**	**28,094**	**30,356**	**1,05,769**	**1,28,355**
C: Vans												
Mahindra & Mahindra Ltd	-	-	65	-	-	-	-	-	-	-	75	10
Maruti Suzuki India Ltd	13,697	13,610	49,112	49,021	11,916	12,341	45,707	45,446	651	752	2,435	3,240
Tata Motors Ltd*	NA	NA	5,032	5,956	NA	NA	5,128	5,530	NA	NA	54	65
Total C: Vans	**13,697**	**13,610**	**54,209**	**54,977**	**11,916**	**12,341**	**50,835**	**50,976**	**651**	**752**	**2,564**	**3,315**
Total Passenger Vehicles	**3,97,854**	**3,98,071**	**16,01,378**	**16,42,445**	**2,96,785**	**3,01,251**	**13,22,791**	**13,13,133**	**61,929**	**67,292**	**2,42,412**	**2,71,622**

* Only cumulative data is available for Apr-June

NA= Not Available

SIAM

Segment & Company wise Production, Domestic Sales & Exports Report for the month of July 2025 and Cumulative for April-July 2025

Report III

(Number of Vehicles)

Category	Production	Domestic Sales			Exports							
Segment/Subsegment	July	April-July	July	April-July	July	April-July						
Manufacturer	2024	2025	2024-25	2025-26	2024	2025	2024-25	2025-26	2024	2025	2024-25	2025-26
Three Wheelers												
A: Passenger Carrier												
Atul Auto Ltd	1,227	1,514	3,723	4,532	813	1,042	2,584	3,382	316	203	703	788
Bajaj Auto Ltd	56,085	65,555	1,88,630	2,08,184	37,852	38,759	1,33,319	1,30,565	13,542	25,051	54,275	80,563
Baxy Ltd	74	73	288	231	98	54	305	135	-	20	-	60
Force Motors Ltd	-	-	672	-	-	-	-	-	-	-	518	-
Mahindra & Mahindra Ltd	1,384	6,926	13,326	23,808	1,319	7,845	13,394	24,329	-	78	132	186
Piaggio Vehicles Pvt Ltd	5,942	7,288	26,910	24,493	5,324	5,317	22,472	18,131	814	1,285	4,062	5,844
Pinnacle Mobility Solutions Pvt Ltd	-	42	-	64	-	6	-	12	-	-	-	-
TI Clean Mobility Pvt Ltd	498	771	2,364	2,056	641	677	2,404	2,285	-	-	-	2
TVS Motor Company Ltd	14,205	18,353	43,733	63,028	2,284	4,993	7,461	15,725	12,163	12,503	37,625	46,554
Total A: Passenger Carrier	**79,415**	**1,00,522**	**2,79,646**	**3,26,396**	**48,331**	**58,693**	**1,81,939**	**1,94,564**	**26,835**	**39,140**	**97,315**	**1,33,997**
E-Rickshaw												
Atul Auto Ltd	381	423	1,824	1,208	412	400	1,873	1,268	-	-	-	-
Bajaj Auto Ltd	-	253	-	253	-	29	-	29	-	-	-	-
Baxy Ltd	166	134	717	441	266	155	840	628	-	-	-	-
Mahindra & Mahindra Ltd	1,606	215	3,013	1,589	1,575	469	3,259	1,721	-	-	-	-
Total E-Rickshaw	**2,153**	**1,025**	**5,554**	**3,491**	**2,253**	**1,053**	**5,972**	**3,646**	**-**	**-**	**-**	**-**
B: Goods Carrier												
Atul Auto Ltd	757	988	3,753	4,123	925	961	3,435	3,557	3	14	19	66
Bajaj Auto Ltd	5,498	5,320	18,542	19,062	4,279	5,076	16,857	18,730	216	508	584	1,012
Baxy Ltd	99	82	409	104	110	77	437	99	-	-	-	-
Mahindra & Mahindra Ltd	159	1,136	4,554	4,482	652	834	4,199	3,518	-	7	120	71
Piaggio Vehicles Pvt Ltd	2,200	2,485	10,473	9,848	2,329	2,196	10,087	9,146	20	62	258	218
TI Clean Mobility Pvt Ltd	-	25	-	109	-	42	-	100	-	-	-	-
TVS Motor Company Ltd	8	33	276	246	17	8	144	40	-	56	59	219
Total B: Goods Carrier	**8,721**	**10,069**	**38,007**	**37,974**	**8,312**	**9,194**	**35,159**	**35,190**	**239**	**647**	**1,040**	**1,586**
E-Cart												
Atul Auto Ltd	168	102	709	416	103	97	609	588	-	-	-	-
Baxy Ltd	8	18	84	167	27	39	83	160	-	-	-	-
Mahindra & Mahindra Ltd	40	505	236	531	47	327	392	466	-	-	-	-
Total E-Cart	**216**	**625**	**1,029**	**1,114**	**177**	**463**	**1,084**	**1,214**	**-**	**-**	**-**	**-**
Total Three Wheelers	**90,505**	**1,12,241**	**3,24,236**	**3,68,975**	**59,073**	**69,403**	**2,24,154**	**2,34,614**	**27,074**	**39,787**	**98,355**	**1,35,583**

SIAM

Segment & Company wise Production, Domestic Sales & Exports Report for the month of July 2025 and Cumulative for April-July 2025

Report III

(Number of Vehicles)

Category	Production	Domestic Sales			Exports							
Segment/Subsegment	July	April-July	July	April-July	July	April-July						
Manufacturer	2024	2025	2024-25	2025-26	2024	2025	2024-25	2025-26	2024	2025	2024-25	2025-26
Two Wheelers												
A: Scooters												
Ather Energy Pvt. Ltd	11,097	16,148	36,563	62,647	11,088	15,096	34,904	62,003	40	240	80	382
Bajaj Auto Ltd	24,498	11,324	71,171	76,009	26,314	12,134	70,168	75,754	-	120	2	120
Hero MotoCorp Ltd	29,672	49,695	1,18,648	1,41,094	27,163	45,989	1,12,552	1,35,275	2,721	3,151	11,532	7,024
Honda Motorcycle & Scooter India Pvt Ltd	3,00,191	2,91,911	11,43,177	11,29,765	2,29,076	2,65,587	10,23,911	9,07,693	28,077	28,486	1,08,939	1,15,793
India Yamaha Motor Pvt Ltd	34,492	29,420	1,23,802	1,05,140	26,290	24,110	1,01,897	87,631	5,446	7,340	22,040	20,687
Okinawa Autotech Pvt. Ltd	134	-	243	32	40	-	132	33	-	-	-	-
Piaggio Vehicles Pvt Ltd	3,008	3,281	16,362	14,295	2,396	2,350	10,900	9,751	1,072	408	5,890	4,415
Suzuki Motorcycle India Pvt Ltd	1,03,616	1,09,011	3,64,949	3,88,070	98,376	94,296	3,44,640	3,66,978	5,574	4,683	18,643	18,069
TVS Motor Company Ltd	1,48,040	2,00,426	5,72,094	6,89,914	1,32,899	1,83,607	5,19,532	6,59,803	7,096	14,658	38,880	37,243
Total A: Scooters	**6,54,748**	**7,11,216**	**24,47,009**	**26,06,966**	**5,53,642**	**6,43,169**	**22,18,636**	**23,04,921**	**50,026**	**59,086**	**2,06,006**	**2,03,733**
B: Motorcycles												
Bajaj Auto Ltd	2,83,363	3,04,135	11,65,358	11,98,807	1,42,533	1,27,145	6,81,176	5,92,869	1,28,694	1,56,848	4,97,112	5,76,295
Hero MotoCorp Ltd	3,93,424	4,83,302	18,13,279	17,52,145	3,20,372	3,66,408	17,19,145	15,79,779	20,018	34,207	62,199	94,750
Honda Motorcycle & Scooter India Pvt Ltd	2,40,694	2,19,223	9,09,451	8,78,365	2,10,042	2,00,744	8,29,439	7,87,631	15,905	20,561	73,603	79,413
India Kawasaki Motors Pvt Ltd	329	248	932	737	254	192	1,321	1,604	-	-	-	-
India Yamaha Motor Pvt Ltd	51,850	51,369	2,09,955	1,91,190	29,548	26,255	1,39,732	1,00,063	14,220	22,632	57,042	93,472
Piaggio Vehicles Pvt Ltd	1,484	601	5,197	4,758	452	172	1,383	821	1,120	448	3,783	3,875
Royal-Enfield (Unit of Eicher Motors)	92,200	1,13,593	3,36,319	3,85,261	61,208	76,254	2,65,894	3,05,033	6,057	11,791	28,278	48,540
Suzuki Motorcycle India Pvt Ltd	16,087	19,530	57,484	68,718	2,226	1,733	7,147	5,979	10,538	12,888	45,460	59,662
Triumph Motorcycles India Pvt Ltd	31	8	133	51	66	82	411	266	-	-	-	-
TVS Motor Company Ltd	1,70,441	2,38,335	6,96,343	8,43,272	83,788	91,122	4,02,763	4,19,511	77,286	1,10,372	2,72,749	4,02,789
Total B: Motorcycles	**12,49,903**	**14,30,344**	**51,94,451**	**53,23,304**	**8,50,489**	**8,90,107**	**40,48,411**	**37,93,556**	**2,73,838**	**3,69,747**	**10,40,226**	**13,58,796**
C: Mopeds												
TVS Motor Company Ltd	43,572	46,307	1,65,949	1,58,583	37,563	33,991	1,60,278	1,43,352	1,044	5,040	1,824	8,286
Total C: Mopeds	**43,572**	**46,307**	**1,65,949**	**1,58,583**	**37,563**	**33,991**	**1,60,278**	**1,43,352**	**1,044**	**5,040**	**1,824**	**8,286**
Total Two Wheelers	**19,48,223**	**21,87,867**	**78,07,409**	**80,88,853**	**14,41,694**	**15,67,267**	**64,27,325**	**62,41,829**	**3,24,908**	**4,33,873**	**12,48,056**	**15,70,815**
Quadricycle												
Bajaj Auto Ltd	556	340	2,699	1,279	19	-	98	4	720	330	2,634	1,296
Total Quadricycle	**556**	**340**	**2,699**	**1,279**	**19**	**-**	**98**	**4**	**720**	**330**	**2,634**	**1,296**
Grand Total	**24,37,138**	**26,98,519**	**97,35,722**	**1,01,01,552**	**17,97,571**	**19,37,921**	**79,74,368**	**77,89,580**	**4,14,631**	**5,41,282**	**15,91,457**	**19,79,316**

Society of Indian Automobile Manufacturers (14/08/2025)

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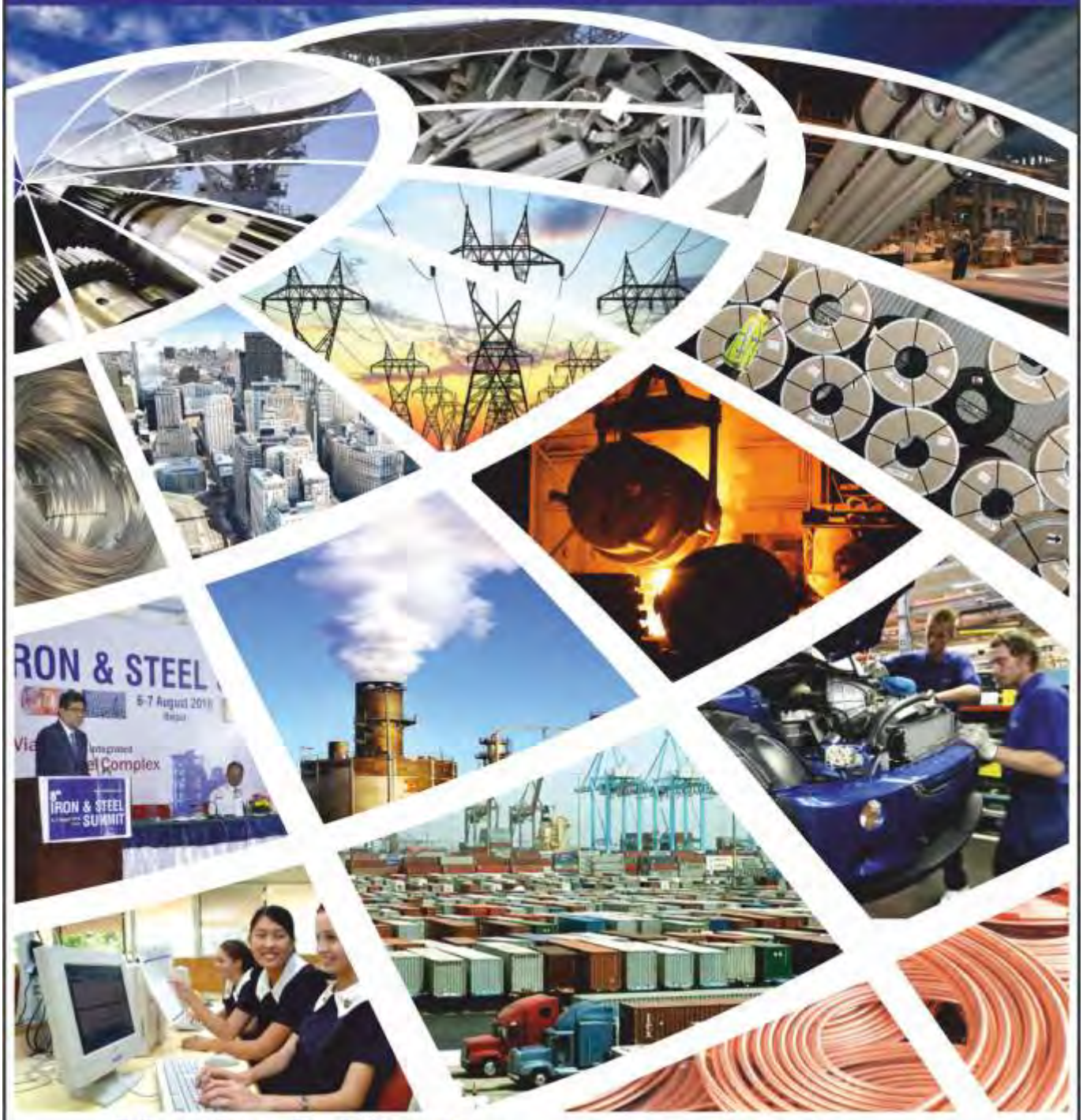

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