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“Innovation, Sustainability,
and Global Competitiveness
Will Define the Future of
ELECTROTHERM”

Suraj Bhandari
Managing Director,
Electrotherm (India) Ltd.

- Aluminium China 2025: Driving Innovation, Sustainability, and Global Collaboration in the Aluminium Industry
- Performance of Base Metals on LME, SMM and MCX – September 2025
- Indian auto industry posts Strong September Growth: SIAM

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D.A. Chandekar Editor

Here's an expanded version of the text: The Journey to Sustainability in the Metal Industry is a complex yet necessary pursuit. As the world grapples with the challenges of climate change, environmental degradation, and social responsibility, the metal industry finds itself at a critical juncture. The pursuit of sustainability is no longer a choice, but a necessity for metal companies to thrive in the long run. In this piece, we will explore the complexities of sustainability in the metal industry and highlight the opportunities and challenges that lie ahead.

The metal industry is one of the largest consumers of energy and natural resources, and a significant contributor to greenhouse gas emissions. However, with the advent of new technologies and innovative practices, metal companies can reduce their environmental footprint while driving growth and profitability. Renewable energy sources, such as solar and wind power, offer a cleaner alternative to fossil fuels, while digitalization can help optimize operations, reduce waste, and minimize carbon emissions.

Improving process efficiency and implementing carbon capture technologies are crucial steps towards reducing emissions. Financial instruments like carbon credit trading can also incentivize companies to prioritize sustainability. Moreover,

sustainable practices can help companies comply with regulations and reduce the risk of non-compliance. By adopting sustainable practices, metal companies can not only reduce their environmental impact but also improve their reputation and brand value.

The path to sustainability requires a holistic approach that incorporates technological innovation, financial incentives, and operational efficiency. By embracing these elements, metal companies can reduce their environmental impact while driving growth and profitability. Companies that prioritize sustainability are more likely to attract investors, customers, and top talent, ultimately driving their long-term success.

As the metal industry continues to evolve, it is essential for companies to prioritize sustainability and make it a core part of their business strategy. This can involve investing in research and development, adopting new technologies, and collaborating with stakeholders to drive sustainability across the value chain. By doing so, metal companies can ensure their long-term viability and contribute to a more sustainable future for all. Furthermore, sustainability can be a key driver of innovation and competitiveness in the metal industry. Companies that prioritize sustainability are more likely to identify new business opportunities, improve their supply chain resilience, and build stronger relationships with customers and stakeholders. As the demand for sustainable products continues to grow, metal companies that prioritize sustainability will be better positioned to meet the needs of their customers and stakeholders.

The journey to sustainability in the metal industry is complex, but with the right approach, metal companies can thrive in a rapidly changing world. By prioritizing sustainability, metal companies can reduce their environmental impact, drive growth and profitability, and ensure their long-term viability. As the industry continues to evolve, it is essential for companies to make sustainability a core part of their business strategy and work towards creating a more sustainable future for all.

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“Innovation, Sustainability, and Global Competitiveness Will Define the Future of ELECTROTHERM”



Suraj Bhandari
Managing Director,
Electrotherm (India) Ltd.

THE INDIAN steel & metal industry is at a crucial juncture balancing rapid growth with global competitiveness, technology adoption, and the urgent need for sustainability. At the heart of this transformation are companies like Electrotherm (India) Ltd., which have pioneered indigenous technologies and helped strengthen India's steelmaking ecosystem.

In this context, Metalworld interacted with Mr. Suraj Bhandari, Managing Director of Electrotherm (India) Ltd., who represents the new generation of leadership at the company. At just 29, he leads the Engineering and Technology Division, driving innovation, sustainability, and digital transformation across Electrotherm's product and process portfolio.

A Bachelor of Technology in Electrical and Electronics Engineering, Mr. Bhandari joined Electrotherm in 2017 as a Management Executive and has since played a key role in steering the company toward its next phase of growth. In this exclusive conversation, he shares insights on Electrotherm's ongoing initiatives, India's steel outlook, and his vision for the future.

Electrotherm has been a technology leader in steelmaking. Could you tell us about the company's journey and its core contributions to the Indian steel & metal industry?

Electrotherm India Ltd. has always believed in innovation-led growth. Since its inception, the company has played a pioneering role in providing end-to-end solutions for steelmaking - from induction melting furnaces to downstream technologies for rolling, refining, and pollution control.

Our contribution goes beyond

equipment supply; we actively partner with the steel industry to enhance productivity, energy efficiency, and sustainability, thereby strengthening India's steel ecosystem.

You represent the second generation of Electrotherm's leadership. How has your journey been so far, and what values guide you forward?

My journey in Electrotherm has been both enriching and challenging. The first generation instilled in us a culture of integrity, customer-

centricity & technological innovation.

As the second generation, our focus is on carrying these values forward while adapting to a fast-changing global environment through digitalization, sustainability, and collaboration.

The guiding principle remains unchanged: deliver value to customers while contributing to national growth.

Sustainability has become a central focus globally. What initiatives has Electrotherm undertaken in this direction?

Sustainability is no longer optional; it's central to our business strategy. Electrotherm has invested in energy-efficient furnaces, waste heat recovery systems, advanced dust collection, and process optimization to reduce emissions.

We are also actively working on green steelmaking pathways and low-carbon operations, aligning ourselves with India's sustainability and climate goals.

How is Electrotherm integrating digitalization and Industry 4.0 into its operations and solutions?

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Face to Face

maintenance, smart process control, and AI-enabled analytics are areas we are deploying to help our customers reduce downtime, improve yields, and enhance product quality.

Our vision is to make steel plants future-ready, with digital technologies seamlessly embedded into their operations.

The steel & metals industry is facing challenges like high energy costs and global volatility. How is Electrotherm responding to these changes?

The steel and metals industry is inherently global and exposed to volatility in raw materials, energy, and trade dynamics.

Our strategy is to focus on technology differentiation, cost-efficient solutions, and superior customer service to help our clients remain competitive.

Electrotherm's diversified presence- across equipment manufacturing, steel products, and international markets- also allows us to balance risks effectively.

What is your vision for Electrotherm over the next decade?

Over the next decade, we aim to consolidate Electrotherm's leadership in steelmaking solutions while expanding into green technologies, digital solutions, & special steel products.

We see huge opportunities in advanced materials, electric mobility, and global technology partnerships. Innovation, sustainability, and global competitiveness will remain the three pillars of our growth story.

Our contribution goes beyond equipment supply; we partner with the steel and metals industry to enhance productivity, energy efficiency, and sustainability.

How are you managing raw material availability and supply chain challenges in today's environment?

We are continuously optimizing procurement strategies and strengthening supplier relationships. Technology plays a key role here - digital monitoring of supply chains, inventory management, and predictive planning are now standard practices.

At the same time, we focus on cost optimization and recycling initiatives to mitigate the impact of raw material price fluctuations.

India has committed to Net Zero by 2070. How is Electrotherm aligning with this goal?

We are aligning closely with India's net-zero roadmap through multiple initiatives - upgrading furnace efficiency, developing technologies that reduce coal dependency, integrating renewable power, and exploring carbon capture possibilities.

While net-zero is a long-term goal, our immediate focus is on reducing carbon intensity in steelmaking and supporting customers in their decarbonisation journey.

With the rise of EVs and renewable energy, demand for special steels is increasing. How is Electrotherm addressing this opportunity?

This is an exciting phase for the

industry. With electric vehicles and renewable energy driving demand for special steels, we are investing in R&D for alloy steels, high-strength rebars, and ductile iron products tailored for these applications.

Our innovation pipeline is closely aligned with India's industrial transformation and future mobility trends.

Electrotherm already exports to over 70 countries. What are your plans for strengthening your global presence?

We have established our presence in more than 72 countries through equipment exports and collaborations.

Our focus now is to strengthen partnerships in emerging steel markets - particularly in Asia, Africa, and the Middle East.

Building a stronger global footprint allows us to showcase Indian technology on the world stage while learning from global best practices.

Finally, how do you view recent government initiatives like Make-in-India and the infrastructure push?

Government policies such as Make-in-India, infrastructure development, and PLI schemes are creating a strong growth environment for the metals industry.

For Electrotherm, these initiatives translate into higher domestic demand, a stronger ecosystem for secondary steel producers, and greater opportunities for technology innovation.

We believe the secondary steel sector will play a pivotal role in achieving India's vision of becoming a global steel powerhouse. ■

Mr. Suraj Bhandari's leadership reflects the evolving face of India's steel technology sector - young, forward-looking, and deeply committed to innovation and sustainability.

Under his guidance, Electrotherm continues to strengthen its position as a trusted partner to the steel industry, helping it transition towards a cleaner, smarter, and more competitive future.



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Aluminium China 2025: Driving Innovation, Sustainability, and Global Collaboration in the Aluminium Industry

By the Metalworld Editorial Team



THE GLOBAL aluminium industry once again converged in Shanghai for Aluminium China 2025, an event that underscored the sector's renewed focus on innovation, sustainability, and cross-border collaboration.

Held in July, the show brought together thousands of professionals from across the aluminium value chain—from raw material suppliers and processors to end-use manufacturers in automotive, aerospace, and energy - making it one of the most dynamic industry gatherings in Asia.

This year's edition reflected both the industry's resilience in the face of global economic shifts and its readiness to embrace the next phase

of low-carbon transformation. With record participation and a clear focus on technology, Aluminium China 2025 proved to be a timely platform for manufacturers and buyers navigating an increasingly sustainability-driven marketplace.

Global Participation and Expanding Industry Outlook

Aluminium China 2025 drew over 30,000 professional visitors and featured more than 600 exhibitors representing the complete aluminium ecosystem — from primary metal producers and semi-fabricators to equipment manufacturers and solution providers. International participation was notably strong, with major delegations from

Germany, Italy, Japan, South Korea, and the Middle East, reaffirming Shanghai's role as a hub for global trade and technology exchange.

A key takeaway from this year's show was the optimism surrounding demand recovery and supply chain diversification. As global economies stabilize, aluminium consumption continues to rise - especially in transportation, construction, and packaging. Chinese manufacturers, in particular, are leveraging advanced rolling, extrusion, and surface treatment technologies to strengthen their position in export markets, while global players look to China for innovation partnerships and supply stability.



The aluminium industry gathered in Shanghai this July for one of the world's most influential trade events, reaffirming its commitment to innovation and sustainable growth. Metalworld brings you a comprehensive post-show report from Aluminium China 2025.



Industry experts at the conference sessions highlighted that despite short-term volatility in energy prices and trade flows, long-term demand fundamentals remain robust, with aluminium's role as a “metal of sustainability” becoming increasingly central to industrial policy and green growth strategies.

Technology at the Core: Smart Manufacturing and Process Optimization

A major highlight of Aluminium China 2025 was the emphasis on digital transformation and smart manufacturing. Exhibitors showcased Industry 4.0-driven technologies such as automated rolling mills, AI-based process control, digital twins,

and energy-efficient furnaces - solutions designed to increase operational precision while minimizing waste and emissions.

Visitors were particularly drawn to live demonstrations of predictive maintenance systems and data-driven quality management tools, signaling a decisive move toward “intelligent” aluminium plants. These innovations are no longer viewed as add-ons but as essential enablers of competitiveness in a market increasingly defined by cost efficiency and environmental performance.

This trend also resonated strongly with end-use industries such as automotive and aerospace, where

lightweighting, performance consistency, and traceability are critical. As one industry leader noted during a panel discussion, “Digitalization is now at the heart of every sustainable aluminium operation. The smarter the process, the cleaner and more profitable it becomes.”

The Green Transition: Low-Carbon Aluminium Takes Center Stage

If there was one recurring theme across the show floor and the conference sessions, it was the commitment to decarbonization. The exhibition featured an entire zone dedicated to low-carbon aluminium solutions, from renewable-powered



Industry Update

smelting technologies to recycling systems and carbon footprint assessment platforms.

Producers showcased innovative methods for reducing carbon intensity, including inert anode technologies, energy recovery from process heat, and the integration of renewable energy sources into smelting and casting operations. The spotlight was also on recycling, as circular economy models gain traction globally. Companies introduced advanced sorting and melting systems that allow for higher-quality recycled aluminium, cutting both costs and emissions.

Delegates agreed that achieving carbon neutrality by mid-century - a goal many aluminium majors have adopted — requires a dual approach: upgrading legacy assets for energy efficiency and investing in new, greener production routes. The discussions reinforced the view that green aluminium is not just an environmental imperative but a commercial opportunity, particularly as end-users increasingly demand certified low-carbon materials.

Collaboration and Knowledge Exchange: The Human Element

Beyond the technology displays,

Aluminium China 2025 served as a vital platform for dialogue. The concurrent forums and workshops brought together policymakers, industry executives, and researchers to discuss key themes such as global trade dynamics, policy support for green development, and workforce upskilling for the digital era.

Several sessions emphasized the importance of international collaboration in addressing shared challenges like energy efficiency, resource management, and market transparency. With rising geopolitical complexities, such gatherings provide an invaluable opportunity for fostering trust and knowledge-sharing across borders.

A particularly insightful discussion revolved around the role of public-private partnerships in accelerating sustainability investments — from renewable power adoption to the deployment of smart factory solutions. Participants called for coordinated action among governments, investors, and technology providers to align industrial policy with long-term environmental goals.

A Showcase of Innovation and Resilience

Exhibitors and visitors alike

praised Aluminium China 2025 for its organization, scale, and diversity of participation. From alloy producers unveiling new high-strength, corrosion-resistant materials to automation firms presenting next-generation robotics for extrusion and finishing lines, the exhibition floor reflected the vibrancy of a sector in transformation.

Start-ups and research institutes also played a larger role this year, presenting pilot projects on battery-grade aluminium, hydrogen applications, and AI-enabled recycling, which hint at the direction of future innovation. The industry's adaptability and collaborative spirit were evident throughout, with many participants noting that the event's momentum mirrors the aluminium sector's broader recovery and modernization efforts.

Looking Ahead: The Aluminium Industry's Sustainable Future

As the curtains closed on Aluminium China 2025, one message stood clear: sustainability and innovation are inseparable in the industry's future trajectory. The convergence of low-carbon manufacturing, digital intelligence, and renewable energy integration marks a new chapter for aluminium — one that promises not just efficiency and competitiveness but also long-term environmental responsibility.

With plans already underway for next year's edition, the event continues to stand as a barometer for the aluminium industry's progress, ambitions, and global outlook. For participants, it was more than an exhibition — it was a reaffirmation of the industry's shared purpose to build a smarter, cleaner, and more sustainable future for metals.





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Performance of Base Metals on LME, SMM and MCX – September 2025

OVERVIEW

SEPTEMBER 2025 marked a turning point for the base metals market, with cautious optimism returning to both global and domestic trading floors. The U.S. dollar softened slightly, China entered its seasonal “Golden September” demand phase, and Indian manufacturing output rose modestly- all of which helped lend stability to metal prices.

Across the London Metal Exchange (LME), Shanghai Metals Market (SMM), and Multi Commodity Exchange (MCX), the month witnessed a mix of steady gains, moderate corrections, and structural adjustments in production. Aluminium and copper continued to show strength, zinc and lead moved sideways, while nickel remained under the pressure of global oversupply.

This report analyses the performance of base metals across these three key exchanges and their broader implications for producers, traders, and consumers.

LME (London Metal Exchange) : Global Price Movements

- Global base metal prices in September reflected



improving investor sentiment after months of volatility. Softer U.S. inflation, supply constraints in China, and signs of steady industrial demand pushed LME prices moderately higher.

- Aluminium surged to its highest level in six months, averaging around US\$ 2,480–2,520 per tonne, supported by power shortages in Yunnan and constrained alumina supply. Copper held firm near US\$ 9,250 per tonne, showing resilience despite mixed manufacturing data from Europe.

- Zinc remained range-bound amid weak galvanizing demand, while lead prices eased slightly as battery manufacturers adjusted inventories. Nickel, after a prolonged slump, posted marginal gains on expectations of renewed stainless steel demand and early signs of battery sector recovery.

Overall, sentiment on the LME improved as investors weighed renewed Chinese stimulus measures against ongoing macroeconomic uncertainty.

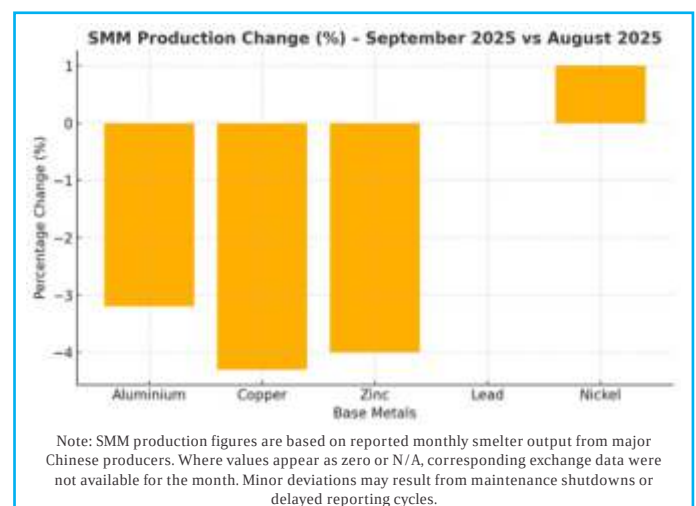
• **SMM (Shanghai Metal Markets) :** Production and Supply Trends (China)

- China's production data in September presented a mixed picture — strong year-on-year growth, but month-on-month declines in key metals due to maintenance and energy controls.

- Aluminium output fell 3.2% MoM, even as YoY production remained up 1.1%. Capacity curtailments in Yunnan and Inner Mongolia were partly offset by restarts in Guangxi and Sichuan.

- Copper cathode output dropped 4.3% MoM, though cumulative Jan–Sept production rose 12.2% YoY, showing strong smelting recovery.

- Zinc production dipped 4% MoM, but rose nearly 20% YoY as new smelters ramped up capacity.





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Industry Update

• Nickel production saw steady growth, up 1% MoM and 13% YoY, led by integrated operations and Indonesian feed imports.

• Lead data remained limited, though secondary smelters faced operational interruptions from tightening environmental norms.

• The key takeaway: while annual production levels remain healthy, near-term output moderation signals that supply-side controls are still shaping the Chinese non-ferrous landscape.

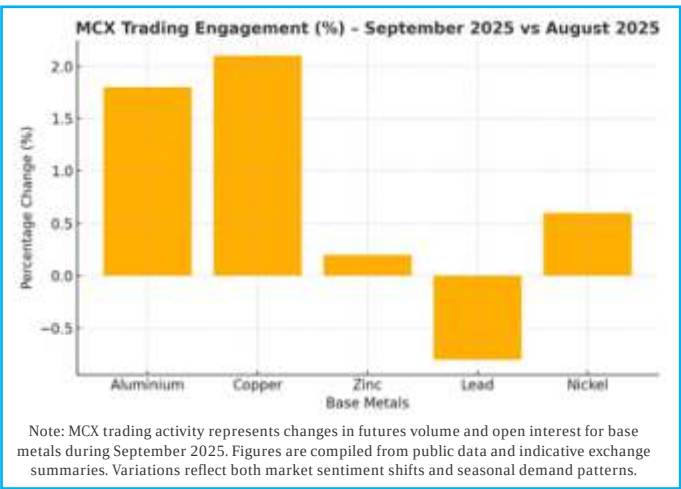
For Indian stakeholders, this trend means potential tightening in imported concentrates, mild upward pressure on spot premiums, and opportunities for domestic recyclers to capture demand.

• MCX (Multi Commodity Exchange : Indian Market and Futures Activity

• The Multi Commodity Exchange (MCX) in India continued to mirror global cues, though local demand dynamics also played an influential role. The standout event of the quarter remained the launch of nickel futures in August, which continued to see gradual liquidity growth through September.

• Aluminium futures traded in the ₹250–₹255/kg range for most of the month, peaking mid-September before mild profit booking. Strong automotive and construction demand helped sustain buying interest.

• Copper contracts showed steady momentum in line with LME trends, supported by infrastructure expansion and renewable energy sector consumption. Zinc and lead contracts remained subdued, mirroring a cautious tone among galvanizers and battery makers.



• The rollout of digital trading tools and algorithmic participation on MCX also contributed to improved market depth, particularly in aluminium and copper contracts.

Comparative Snapshot – September 2025

Metal	LME Price Movement (MoM)	SMM Production Change (MoM)	MCX Trading Activity (MoM)
Aluminium	▲ 2.3%	▼ 3.2%	▲ 1.8%
Copper	▲ 1.6%	▼ 4.3%	▲ 2.1%
Zinc	■ 0.0%	▼ 4.0%	■ 0.2%
Lead	▼ 0.5%	N/A	▼ 0.8%
Nickel	▲ 1.2%	▲ 1.0%	▲ 0.6%

Note: Arrows indicate month-on-month trend direction.

For domestic producers and fabricators, the steady MCX performance indicates resilience in India's downstream metal demand, even as global markets remain volatile.

Market Interpretation and Outlook

• Global Outlook: The fourth quarter outlook remains cautiously optimistic as stimulus in China and lower energy costs in Europe could support manufacturing recovery.

• India's Perspective: Domestic consumption remains steady, driven by auto, electrical, and infrastructure sectors. The introduction of new futures products (like nickel) strengthens India's risk management tools for the non-ferrous sector.

• Price Dynamics: With aluminium and copper showing sustained firmness, Indian semi-fabricators may face rising input costs but also better export opportunities as global demand improves.

Supply Chain Note: Zinc and lead producers continue to grapple with uneven downstream demand. The industry focus will remain on recycling, process efficiency, and cost optimisation.

In summary, September 2025 provided a relatively stable base metals environment — not spectacularly bullish but underpinned by steady industrial activity and clearer price direction heading into Q4.

All figures and percentage changes are based on publicly available data as of September 2025 from LME, SMM, and MCX sources. Where data are marked as N/A, respective exchanges or agencies did not release full information for that category. This article is part of Metalworld's ongoing monthly series analysing base metal trends across major global and regional exchanges.



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India's Copper Cathode Quality Rules Raise Supply Alarm

Quality controls must protect users, not starve them



INDIA'S TIGHTENED quality control norms on copper cathode imports are prompting concerns of supply bottlenecks in the downstream non-ferrous sector. The mandate, enforced in December 2024, requires all cathode imports and domestic production to secure certification from Bureau of Indian

Standards (BIS). The Bombay Metal Exchange (BME) has flagged the move as potentially reducing access for foreign supplies, especially from Japanese firms, due to high compliance costs. India, which imports a significant share of its refined copper, may face increased risk of disruption at a time when demand in the wiring, electrical and EV-components sector is ramping up. The government maintains that the rules bolster quality and safeguard domestic industry, but the BME warns that delays and narrowed supplier choice could raise prices for Indian fabricators and casters.

ASM organises S.B. Firke Memorial Lecture

THE ANNUAL General Body Meeting of ASM International India Chapter was held on 8th October 2025 at Hotel Kohinoor Continental, Andheri – Kurla Road, J. B. Nagar, Andheri (E), Mumbai. The meeting started at 5:15 pm with the opening remarks of the Chapter Chair Mr. Rajesh Shah. This was followed by the reading and confirmation of the minutes of the meeting of the previous AGM which was held on 27th September 2024 by the Chapter Secretary Dr. Rajkumar. The report on the accounts was read by Mr. Dev Bhise, Chapter Treasurer. The Chapter Chair briefed on his experience with ASM and expressed the fact that the chapter needs to attract young members to join the executive committee and bring fresh ideas to the table to attract more members. The meeting was attended by more than 60 members.

Dr. Kamachi Mudali, VC, Homi Bhabha National Institute delivered the second S B Firke Memorial. Mr. S B Firke was a metallurgist from IT BHU who worked extensively on defence projects of Copper rolling, Aluminium rolling, etc. This award lecture has been instituted by Mr. Sudhakar



Bonde, Past Chair, ASM International India Chapter. The memorial lecture is focused on progress in Metallurgical Engineering in metallic materials. Dr. Kamachi's talk was titled 'E-waste Technology and Management for Wealth from Waste'. He focussed on the extensive use of gadgets post corona and its leading to huge e-waste generation. He enlightened the audience with his in-depth command on the subject. He explained the challenges in recovery of critical materials from these waste streams and showed that there is good potential, with right business model, to reap benefits. He also stressed the fact that the government has various funding and support schemes for enthusiasts who enter this business.

India Proposes National Minerals Exchange to Formalise Non-Ferrous Trading



IN A MOVE to streamline metals and minerals trading, the Government of India is laying the groundwork for a dedicated National Minerals Exchange. Aimed at bringing formal contract mechanisms, price discovery and transparency to non-ferrous markets, the initiative would regulate aluminium, copper, zinc, nickel and other key metals.

Why it matters: For non-ferrous industry participants-metal producers, recyclers, and traders - the proposed exchange presents a potential shift in procurement, hedging and risk management models. Structured contract trading may reduce volatility, improve logistics and incentivise investment in metal-based value chains.

National Minerals Exchange Proposal Aims to Transform Non-Ferrous Trading

THE INDIAN government is advancing plans to establish a dedicated National Minerals Exchange (India) for minerals and metals, including high-priority non-ferrous metals like aluminium, copper, zinc and nickel. The envisioned entity would formalise trading, improve transparency, and enable hedged contracts, reducing reliance on informal spot markets. For the non-ferrous industry - from primary producers to scrap recyclers - this could mean improved price discovery, lower supply-chain risk and more disciplined trading. However, industry participants note that implementation and regulatory clarity will be crucial for the exchange to achieve meaningful impact.

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Foseco Acquires Majority Stake in Morganite Crucible (India)



GLOBAL CONSUMABLES specialist Foseco International has announced the acquisition of a 75% stake in Morganite Crucible (India) Ltd for ₹653 crore via a stock-based transaction. The deal will see Morganite's Indian promoters receive Foseco shares in return. Morganite's strong presence in non-ferrous

foundry supplies (particularly aluminium and copper alloys) now comes under Foseco's global umbrella, positioning the firm to deepen its penetration in India's high-growth non-ferrous segment.

Why it matters: This move signals global technology providers consolidating around Indian non-ferrous capability a shift from volume-driven primary metals toward value-added foundry and downstream performance alloys. For Indian manufacturers, this means access to upgraded technology, better global integration, and heightened competition.

Adani Copper Smelter Seeks LME Listing, Enhancing India's Non-Ferrous Bearings

ADANI ENTERPRISES Ltd has applied to list its forthcoming 500,000 tpa copper smelter in Kutch as a brand on the London Metal Exchange (LME). The US \$1.2 billion facility aims to reduce India's dependence on refined copper imports and integrate domestic production into global commodity flows. If approved, Indian-refined copper would gain access to GDRs, hedging tools and global warehousing via LME links.

Why it matters: The listing would raise India's non-ferrous export profile, strengthen upstream



integration (ore → smelter → finished metal) and improve financing access. For non-ferrous ecosystem players scrap suppliers, toll-casters, alloy makers this opens new channel possibilities.

India Launches E-Waste Recycling Plant Targeting Non-Ferrous Metals in Visakhapatnam

E-waste is now a hidden mine of non-ferrous value.



KOLKATA-BASED Eyantram Waste Management Pvt Ltd has inaugurated a ₹20 crore integrated recycling facility at the Andhra Pradesh MedTech Zone (AMTZ) in Visakhapatnam focused on recovering high-value non-ferrous and precious metals from medical e-waste and electronics. Built on technology licensed from CSIR-National Metallurgical Laboratory (CSIR-NML), the plant will serve Andhra Pradesh, Telangana, Odisha and Chhattisgarh. By extracting aluminium, copper, zinc and rare-earth elements from waste streams, the facility puts formal infrastructure behind India's circular non-ferrous ambitions. For domestic metal processors and foundries, the development offers new low-cost feed sources while advancing sustainability credentials.

Global Major, Rio Tinto, Eyes Low-Carbon Aluminium Expansion in India

RIO TINTO has signed a memorandum of understanding (MOU) with India's AMG Metals & Materials (AMG M&M) to explore a large-scale low-carbon aluminium smelter in India. The project envisions up to 1 million tpa of primary aluminium and 2 million tpa of alumina production powered by renewable energy such as solar and pumped-hydro storage. The initial phase will assess construction of a 0.5 million tpa smelter, aligning with India's push for sustainable non-ferrous production and export-ready manufacturing. If realised, the project would mark a significant vote of confidence in India's non-ferrous sector and its ability to attract global decarbonisation-linked investment.

Shanghai Futures Exchange Sees Weekly Rise in Non-Ferrous Metal Futures

THE SHANGHAI Futures Exchange (SHFE) reported that weekly futures for major non-ferrous metals—including copper, aluminium and nickel—rose during the 17–24 October trading period, supported by improved global macro-sentiment and renewed demand expectations. The gains reflect stronger commodity fundamentals and tentative signals of supply tightness in key regions.

For Indian non-ferrous stakeholders, improved global futures liquidity and pricing signals highlight both export potential and the need to remain cost-competitive in a tighter global market.

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IBAAS–IMMT–IIM 2025: Driving a Green and Smart Aluminium Future

By the Metalworld Editorial Team

THE 13TH INTERNATIONAL Bauxite, Alumina & Aluminium Conference and Exhibition (IBAAS–IMMT–IIM 2025) concluded successfully at CSIR–IMMT, Bhubaneswar, from 8–10 October 2025, reaffirming its position as one of the most significant global platforms for the aluminium sector. The event was organized under the theme “A Green and Smart Aluminium Industry for Tomorrow”, highlighting sustainability, digitalization, and innovation as the pillars of growth for the industry's next phase.

More than 300 delegates representing over 100 organizations from India, Australia, Guinea, France, Germany, Japan, Hungary, Switzerland, UAE, and the USA participated. Attendees included major aluminium producers, research institutes, technology suppliers, equipment manufacturers, and service providers. The three-day event featured technical sessions, keynote addresses, an international exhibition, and industry visits, creating a vibrant environment for knowledge exchange and collaboration.

Focusing on a Sustainable and Digitally Driven Industry

India's rapid rise as a global aluminium hub was a central theme throughout the conference. Discussions emphasized value addition, import substitution, self-reliance, energy efficiency, and decarbonization—core components of India's transition toward a sustainable and resilient aluminium industry.

A special plenary on “Decarbonization and Digitalization” attracted significant attention, showcasing how automation, AI, and data-driven tools are transforming process control, reducing emissions, and enabling a move toward a net-zero aluminium ecosystem. Experts underscored that the path to sustainability is intertwined with digital readiness, operational transparency, and strong industry–academia collaboration.

Inaugural Session and Keynote Insights

The conference was inaugurated by Mr. Brijendra Pratap Singh, CMD, NALCO, who served as Chief Guest. He was joined by dignitaries from the Aluminium Stewardship Initiative (ASI), Hindalco, CSIR–IMMT, and IIM Bhubaneswar.

In his address, Mr. Singh

highlighted the importance of technological self-reliance and low-carbon operations, stating that “India's aluminium sector is poised to be the green engine of the nation's industrial growth.”

The inaugural session was followed by seven keynote lectures by leading global experts, who presented on topics including:

- Competitiveness of Indian aluminium in global markets
- Utilization of low-grade bauxite
- High-purity aluminium production
- Pathways to low-carbon smelting and circularity

These sessions collectively set the tone for an event that emphasized innovation-driven sustainability and collaborative progress.

Technical Sessions: Innovation Across the Value Chain

Over the three days, the conference hosted parallel technical sessions covering all segments of the aluminium value chain — bauxite, alumina, smelting, downstream, and sustainability.

Some of the standout themes and presentations included:

Decarbonization and Aluminium 4.0: Exploring AI, IoT, and advanced data models in smelting and refining.

Innovative bauxite beneficiation: Use of low-grade ores and non-metallurgical applications.

Smelter efficiency: Advances in anode–cathode performance and energy recovery systems.

Recycling and circular economy: Case studies on secondary aluminium and alloy recovery.

The IBAAS Awards 2025 recognized exceptional young scientists and engineers from Hindalco, Vedanta, BALCO, and academic institutions for innovations in refining, smelting, and sustainable development.



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Exhibition: Where Technology Meets Collaboration

Running parallel to the conference was a grand exhibition, housed in a specially designed German hanger, showcasing the latest technologies and services in aluminium manufacturing.

Nineteen domestic and international exhibitors participated, including leading companies such as SNF India, Riedhammer GmbH, Westech, ALTEK Europe, Heraeus Technologies, Drache, Tokai Cobex, Fives Aluminium, and Romco Aluminate Pvt. Ltd.

The exhibition became a networking hub where professionals, researchers, and entrepreneurs exchanged ideas and explored collaborations in equipment supply, specialty chemicals, and process solutions. It also served as an interactive platform for students and young professionals to engage with industry veterans.

Recognizing Excellence: ASI Session and ESG Awards

A special session conducted by the Aluminium Stewardship Initiative (ASI) focused on responsible sourcing, traceability, and sustainability standards within the global aluminium supply chain.

The highlight of the session was the IBAAS–CETIZION ESG Awards 2025, honouring organizations demonstrating excellence in environmental, social, and governance (ESG) performance.

Awardees included:

- Gold: Aditya Aluminium, Cevher Jant Sanayii A.S., Midal Cables, Hindalco Mouda
- Silver: BALCO, Hindalco Hirakud Smelter, Mahan Aluminium, TAHA International



• Bhoruka Extrusions

The awards underscored the growing emphasis on sustainability as a strategic imperative, celebrating organizations that are leading by example in integrating ESG principles into daily operations.

Sponsors and Industry Support

IBAAS acknowledged the strong support of its sponsors and partners, whose collaboration was instrumental in the event's success. Key sponsors included:

- Gold Sponsors: SNF India, Romco Aluminate Pvt. Ltd.
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Their contributions helped the event achieve record participation and deliver a meaningful exchange of technical insights, best practices, and policy perspectives.

Post-Conference Technical Visit

To complement the technical deliberations, a post-conference industrial visit was organized to NALCO's Angul Smelter Plant on 11 October 2025. Delegates gained firsthand insights into India's large-scale aluminium operations, including

process integration, energy management, and sustainability measures. The visit reinforced IBAAS's commitment to bridging research and practical industry application.

A Platform for Global Collaboration

IBAAS–IMMT–IIM 2025 reaffirmed the importance of industry–research

partnerships in addressing critical challenges such as raw-material security, energy transition, and digital transformation.

The event fostered dialogue on the future of aluminium in a carbon-constrained world, encouraging participants to focus on circularity, renewable integration, and innovation in processing and recycling.

With India positioning itself as a global hub for green aluminium, IBAAS's collaborative approach resonated deeply with policymakers and industry leaders alike.

Conclusion: A Vision for the Future IBAAS–IMMT–IIM 2025

successfully carried forward its legacy of promoting collaboration, innovation, and sustainability in the aluminium industry. The conference's focus on digital transformation, decarbonization, and circular growth reflects a decisive step toward realizing India's vision of a green and self-reliant aluminium ecosystem.

As the global aluminium market evolves, IBAAS continues to serve as a bridge between science, technology, and business — guiding the industry toward a smarter and more sustainable future.

Photographs, presentations, and the souvenir volume are available at www.ibaas.info

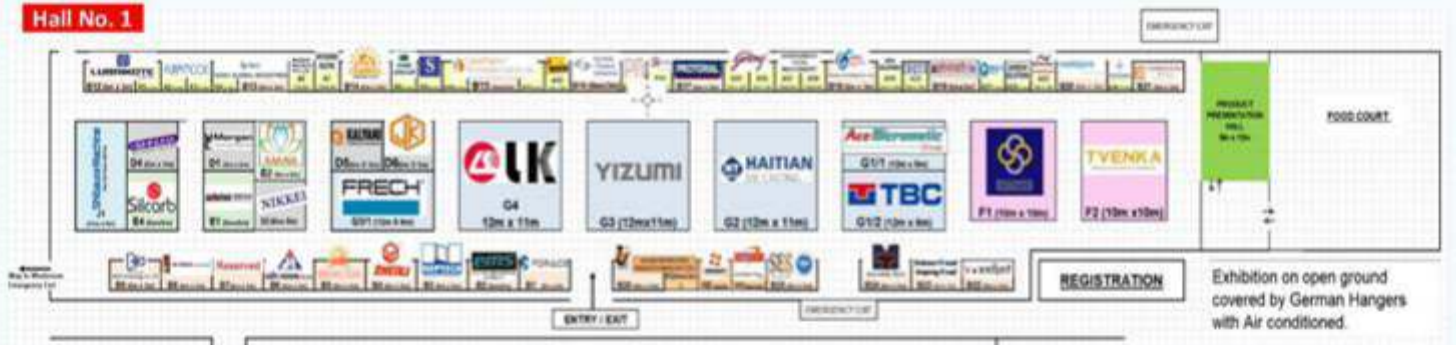
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Decarbonising Aluminium Through Circularity: The Next Frontier

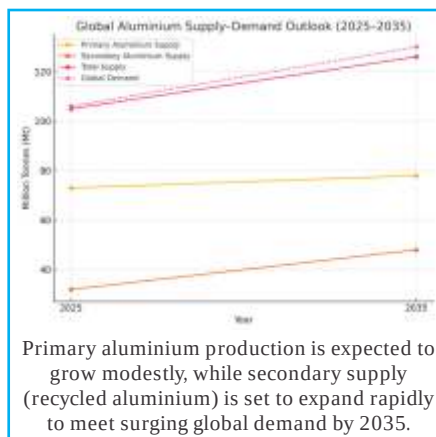
- By the Metalworld Editorial Team

ALUMINIUM IS fast becoming the metal of the energy-transition age. Whether in electric vehicles, solar panels, wind turbines or lightweight-construction, aluminium's low weight and high durability are major advantages. However, the “primary” route - mining bauxite, refining alumina and smelting aluminium - remains energy-intensive, with substantial CO₂ emissions embedded in both power use and carbon-anode consumption. ([McKinsey & Company][1])

That's why the recent McKinsey article “Cleaning up mixed scrap: Decarbonising aluminium through circularity” is so timely. It argues that instead of relying solely on new smelters, the aluminium industry must ramp up secondary production (recycling) and drastically improve how it sorts and reuses scrap - especially mixed, post-consumer scrap. The model could unlock large emissions cuts while feeding demand growth in a lower-carbon way.

Demand Meets Supply Pressure

The global aluminium market is expected to grow from about 106 million tonnes (Mt) in 2025 to around



Primary aluminium production is expected to grow modestly, while secondary supply (recycled aluminium) is set to expand rapidly to meet surging global demand by 2035.

The forecast underscores the rising importance of recycling. Without accelerated secondary-aluminium capacity, the global market could face a supply gap of nearly 4 million tonnes by 2035.

130 Mt by 2035, a 2.1 % per annum increase. ([McKinsey & Company][1]) That growth is driven not only by traditional sectors such as construction and packaging, but increasingly by EVs and renewable-energy systems, which often require more aluminium per unit of product.

On the supply side, McKinsey estimates primary aluminium output will increase only modestly - from around 73 Mt to 78 Mt by 2035 - while secondary aluminium could grow

from ~32 Mt to nearly 48 Mt in the same period.

In effect: the future of aluminium supply is being built on recycling just as much (or more) than new production.

The Mixed-Scrap Challenge

Yet the recycling story is not straightforward. One of the biggest hurdles is mixed scrap — aluminium blends (often 6xxx, 7xxx series alloys) that are difficult to sort and process, and frequently end up “down-cycled” into lower-value applications.

McKinsey notes that around 51 % of global aluminium scrap is mixed scrap — compared to about one-third which is more easily sorted, higher-value pre-consumer scrap. The consequence: even though aluminium is highly recyclable in theory, real-world recovery rates vary drastically by region, alloy type and collection system.

Advanced sortation technologies (X-ray fluorescence, X-ray transmission, laser-induced breakdown spectroscopy) are now capable of separating high-value alloy streams — but only if industrialised and scaled. McKinsey estimates that processing

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Technical Focus

costs of \$200-\$300 per tonne for scale of 30-40 kt/year could be reached, with margins of \$50-\$150/tonne for well-sorted feed-stocks.

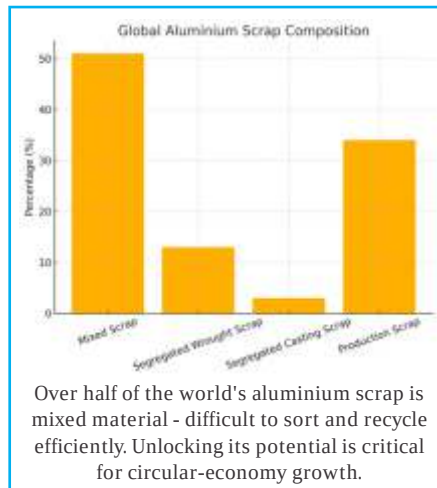
Why Does This Matter for India ?

For India's non-ferrous industry, especially aluminium and downstream fabricators, the implications are many-fold:

Feed-stock advantage: As global scrap pools shift from primary to secondary, India could position itself as both a user and recycler of high-value scrap- reducing dependence on imported alumina/bauxite.

Emissions and value-add: With India committed to Net Zero by 2070, recycling and circular aluminium make sense economically and environmentally. Lower energy use (secondary uses ~5 % of energy of primary) can be a major cost-lever.

Technology investment: Indian foundries and fabricators must make the shift from commodity casting to alloy-specific value chains. Investing in sortation, alloy-tracking and closed-loop recycling will differentiate competitiveness.



Mixed scrap represents both a challenge and an opportunity: better sortation, tracking, and alloy-specific recycling technologies can dramatically improve recovery yields and reduce the industry's carbon footprint.

Policy alignment: Incentives and regulation matter.

McKinsey highlights how Europe's Critical Raw Materials Act and U.S. Inflation Reduction Act are boosting secondary-aluminium capacity. India could adopt similar mechanisms to accelerate circular pathways.

Collaboration Is Key

The McKinsey article emphasises that the industry cannot succeed in

isolation. Building circular value chains requires collaboration: scrap collectors, sortation tech providers, remelters and end-users must align. McKinsey cites recent industry alliances (e.g., Constellium-OSR, Hydro-Padnos) as proof that partnerships help scale sorting, reduce cost and raise recovery rates.

For India, this offers a blueprint: collect, sort, alloy-track and reuse - all under a coordinated ecosystem where fabricators commit to high-recycled-content offtake, and collection systems are formalised.

The Road Ahead

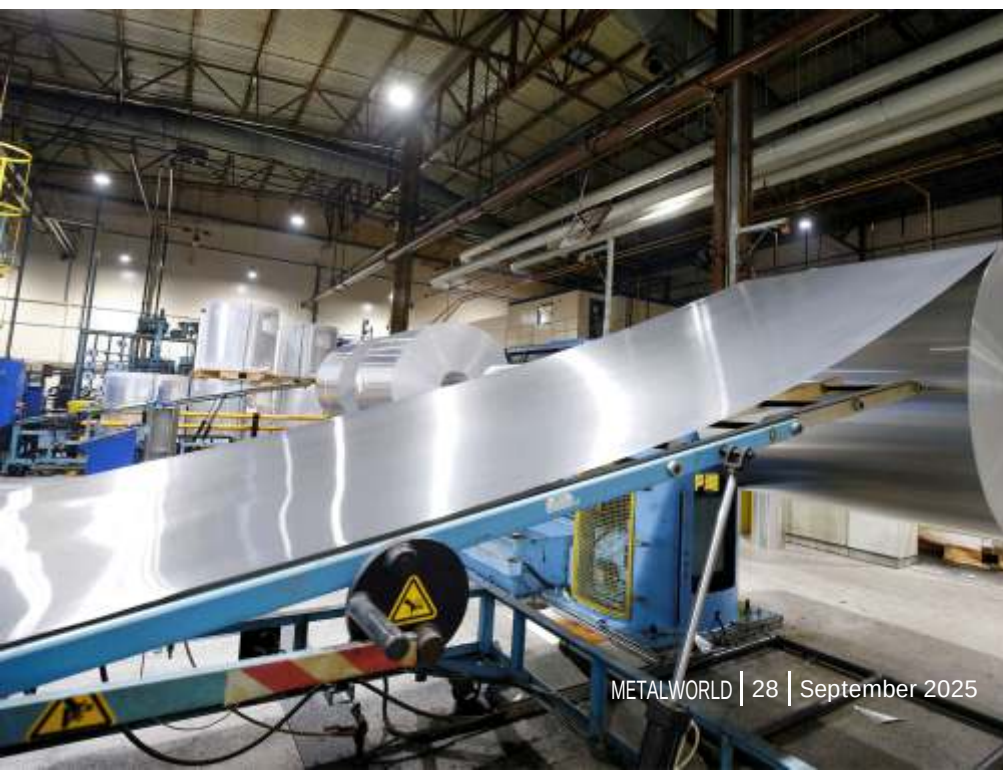
What does the future hold?

McKinsey's numbers suggest that by 2035, secondary aluminium could supply nearly 40 % of total aluminium output. The gap between supply and demand - though small (about 4 Mt) - highlights how tight the market could become if recycling pathways aren't effectively scaled.

The Indian non-ferrous industry has an inflection point: emphasise alloy-quality recycling now, invest in smart sortation, position for circular feed-stocks, and align with global decarbonisation flows. The entire value-chain stands to benefit — from lower feed cost, improved margins, to stronger sustainability credentials.

Metalworld Takeaway:

The aluminium industry is moving beyond mere production metrics - future success will be defined by circularity, alloy-specific recycling and high-integrity value chains. India is well-placed to lead in this transformation - if it builds the ecosystem now.





India's Foundry Market – Rapid Expansion of Non-Ferrous Casting Segment



THE INDIAN foundry and casting market is gaining significant traction, with the latest research estimating a size of approximately US \$19.8 billion in 2024 and projecting a leap to US \$51.19 billion by 2033, at a compound annual growth rate (CAGR) of 11.13% during 2025-33.

A closer look reveals that while ferrous materials still dominate (over

84% share in 2024), the non-ferrous segment is forecast to grow at nearly 11.8% through 2030.

Key growth drivers include the automotive sector's shift to lightweight materials, the rise in electric vehicles (EVs), and increasing demand for precision castings in aerospace and power generation. As sand casting remains dominant (59.4% share in 2024) other casting methods such as investment casting and die-casting are gaining ground as higher-value segments.

For foundry operators and non-ferrous component makers, the message is clear: capability upgrades and shift toward aluminium, copper and zinc alloy castings must accelerate if India's foundry sector is to capture the global "China +1" opportunity and meet evolving demand dynamics. ■

International Technology Entry Signals Upgrade Wave in Indian Foundries

Global foundry-technology players are increasingly eyeing India's upward trajectory in light metals and non-ferrous casting. Notable in this context is the entry of Messe Düsseldorf into India via cooperation with Inter Foundry (scheduled 10-12 September 2026 in Coimbatore).

Messe Düsseldorf, a leading organiser of global trade shows for metallurgy and foundry equipment (GIFA, METEC, THERMPROCESS) is bringing its marketing and technology platform to the Indian ecosystem — recognising India as the world's third-

largest casting producer and a key growth frontier. The collaboration emphasises light-metals (aluminium, non-ferrous) demand in automotive and energy sectors, signalling that India's foundries will need to invest not only in capacity but in automation, digitalisation, process monitoring and sustainability technologies.

For foundry managers, this means that not only will buyer specs become more demanding, but global equipment and service providers will increasingly set the benchmark — making early strategic investment critical. ■

Recycling-Led Foundry Models Gain Momentum in Non-Ferrous Segment



WITH RISING global emphasis on circular economy and sustainability, non-ferrous foundries in India are restructuring operations to integrate internal recycling loops. According to market data, foundries that collect, melt and recast scrap aluminium and copper via in-house processes can reduce metal-costs by up to 20% and reduce carbon footprints by approximately 15%.

This trend is further boosted by regulatory developments: as non-ferrous scrap rules are formalised, demand for recycled feed-stock is expected to expand in the next 3-5 years. Coupled with growth in EV, renewable energy and downstream alloy castings, the logic for foundries is clear—build recycling capability, optimise alloy yields and trade off-grade waste into value.

For foundry operators this means revisiting supply-chain models (collecting scrap locally), investing in melting and filtration systems suitable for non-ferrous alloys, and aligning with buyer ESG and traceability requirements. The foundry of tomorrow is not just a casting house it is a metal-value-chain hub. ■

M&A Activity Spikes in Non-Ferrous Foundry Arena – Vesuvius Acquisition Example

Global molten-metal engineering firm Vesuvius plc (LON: VSVS) recently acquired the non-ferrous foundry division of Morgan Advanced Materials (Molten Metal Systems business) for £92.7 million. This transaction significantly enhances Vesuvius's presence in the non-ferrous segment and in India, where around 20% of the acquired

business's revenue is generated. Post-acquisition, Vesuvius projects that its Foundry division revenues from non-ferrous metals will increase from 21% in 2024 to approximately 27% on a pro-forma basis. The deal highlights both the size of the opportunity in non-ferrous foundries and the willingness of global peers to invest in India as an anchor market.

For Indian foundry firms focused on non-ferrous alloys, this signals impending competition from globally integrated players who bring advanced consumables, high-performance alloys, and scale advantages underlining the need for local players to upgrade technology, deepen capabilities and align with global supply-chain requirements. ■



India's New Copper Cathode Rule Risks Supply Shortages in Non-Ferrous Sector

Quality controls must protect users, not starve them.



INDIA'S TIGHTENED quality control norms on copper cathode imports are creating concern among downstream non-ferrous fabricators. The rules introduced in December mandate that all cathode imports and domestic production obtain certification from the Bureau of Indian Standards (BIS). The Bombay Metal Exchange (BME) warns this may reduce access to foreign suppliers seven of which are Japanese firms because of high compliance costs.

India, which ranks as the world's second-largest importer of refined copper, could face narrowing supply at a time when demand for wiring, electrical equipment and EV-components is accelerating.

The government defends the rules as necessary to safeguard quality and ensure domestic consumption requirements are met, but the BME argues that delayed approvals and restricted supplier choice may drive up costs for fabricators.

Eyantram Waste Management Launches ₹20 Crore Non-Ferrous & Rare-Earth Recycling Plant in Visakhapatnam

Kolkata-based Eyantram Waste Management Pvt Ltd has inaugurated a new integrated recycling facility in the Andhra Pradesh MedTech Zone (AMTZ), Visakhapatnam, investing around ₹20 crore. The plant, developed in collaboration with CSIR-National Metallurgical Laboratory (CSIR-NML), caters to e-waste and medical-waste streams from states including Andhra Pradesh, Telangana, Odisha and Chhattisgarh. The facility will recover high-value non-ferrous metals such as aluminium, copper and zinc, along with rare-earth elements, thereby



supporting India's circular-economy goals in the non-ferrous sector.

For foundries and non-ferrous processors, this represents a new low-cost feedstock route and a boost for sustainability credentials- especially as regulatory pressure builds on scrap and secondary metal streams.

Extended Producer Responsibility (EPR) Framework for Non-Ferrous Scrap Launched



The Ministry of Environment, Forest & Climate Change (MoEF&CC) has notified amendments to the Hazardous and Other Wastes (Management and Transboundary Movement) Rules that will bring non-ferrous metal scrap-including aluminium, copper, zinc and lead-under Extended Producer Responsibility (EPR). The new rules, effective 1 April 2026, require producers, importers and recyclers to implement end-of-life metal collection, processing networks and recycling targets.

This regulatory shift could transform India's non-ferrous supply chain- accelerating formal scrap-processing capacity, improving traceability and aligning with national sustainability goals. Foundries & alloy makers that engage early may secure a competitive edge in feed-stock availability & regulatory compliance.

India's Aluminium Demand Hits Record High on Infrastructure Push

INDIA'S ALUMINIUM demand surged to a record 4.6 million tonnes in FY 2024-25, driven by government infrastructure spending, rapid urbanisation, and strong offtake from the transport and electrical sectors. According to the Aluminium Association of India (AAI), per-capita aluminium consumption in India has now crossed 3 kg, with expectations to touch 5 kg by 2030.

Domestic producers such as Hindalco, Vedanta and NALCO are operating near full capacity, while imports of value-added products continue to rise due to the limited availability of downstream rolling and extrusion units. Analysts believe this marks a turning point for India's aluminium ecosystem moving from primary metal dependency toward a robust downstream manufacturing base.



India's Non-Alloyed & Scrap Aluminium Exports Fall in H1 2025



INDIA'S DOWNSTREAM aluminium industry is navigating a turbulent trade phase. In H1 2025, exports of non-alloyed aluminium dropped to 495.7 million tonnes (valued at US\$ 1.36

billion), down ~39 % from H1 2024. Alloyed-aluminium exports similarly declined (~33 %) to 212.5 million tonnes (US\$ 581.9 million). Aluminium waste and scrap exports also fell—from 8.1 million tonnes (US\$ 16.5 million) to 6 million tonnes (US\$ 13.49 million), a 26 % drop.

The downward trend comes despite rising domestic consumption, reflecting slower offshore demand for India's non-ferrous products and the early impact of regulatory shifts, such as the EU's CBAM (Carbon Border Adjustment Mechanism). Notably, while exports shrank, India's aluminium scrap imports have risen sharply — indicating a domestic need for remelt feed ahead of increased downstream activity. For Metalworld readers, this dual movement speaks to an export-contraction phase alongside a possible import-led feedstock build-up. The key takeaway: exporters must find new premium markets or adapt grades, while scrap processors may see rising feedstock flows.

India to Introduce EPR Rules for Non-Ferrous Metal Scrap From April 2026



INDIA'S ENVIRONMENT

AL regulator has notified an amendment (G.S.R. 438(E) dated 1 July 2025) to the Hazardous and Other Wastes (Management

and Transboundary Movement) Rules, 2016, introducing Extended Producer Responsibility (EPR) obligations for non-ferrous metal scrap. Effective 1 April 2026, manufacturers and importers of aluminium, copper, zinc scrap-bearing products will be required to collect, recycle and report scrap flows, and meet collection targets.

For the non-ferrous sector, this means: supply-chain traceability becomes critical; downstream players will need to register with responsible agencies; and scrap value chains must evolve to meet compliance. Given India's growing reliance on imported scrap and rising remelting activity, the EPR regime will spotlight domestic collection, processing and regulatory oversight. Stakeholders in non-woven, cables, and alloy supply will need to anticipate compliance costs and integrate scrap logistics now. For Metalworld audiences engaged in recycling, remelt, alloys or scrap trade, the message is clear: build your EPR readiness today or risk margin erosion tomorrow.

India's Aluminium Scrap Imports Surge in H1 2025



INDIA'S ALUMINIUM scrap import market recorded a strong revival in H1 2025, with imports reaching US\$1.901 billion (876.0 K tons), up ~19.4 % in value and ~10.5 % in volume compared with the same period in 2024. The average import price rose to US\$2,170/ton, up ~8 % YoY. While exports of finished and semi-finished aluminium weakened the growing

scrap import signals domestic downstream demand re-building. The top exporters to India included the USA (23.7 % share), Saudi Arabia (10.4 %), UK (8.6 %) and UAE (8.1 %).

For non-ferrous players in India this points to: increased remelt feedstock availability, but also rising cost pressure as import prices climb. The interplay of higher feedstock costs, still-weak exports and domestic downstream demand recovery will define margin dynamics for remelters, foundries and processors. The scrap surge also suggests that India is striving to offset raw-material scarcity for aluminium via remelt rather than primary metal imports.

Non-Ferrous Producers Lagging While Ferrous Sector Gathers Strength in India



Despite bullish signals for metals, Indian non-ferrous producers particularly aluminium and zinc makers have reported weaker-than-expected margins in early 2025. Analysts attribute the under-performance to feed-stock cost volatility, elevated imports, and softer downstream demand. In contrast, the ferrous sector (steel and related products) has benefited from improved pricing and cost dynamics.



Copper Trading Volume on LME Rises as Price Arbitrage Narrows

More copper is trading—but pricing strength is still on borrowed time.



THE LONDON Metal Exchange (LME) reported a 2.2 % rise in copper trading volumes during the first seven months of 2025 compared with the same period in 2024, totalling more than 635,000 metric

tonnes. The improved liquidity comes even as arbitrage gaps between Comex and LME contracts are narrowing and Chinese supply constraints persist. Global demand for copper remains high—but volatility has held back sustained price rallies.

For non-ferrous producers and exporters, this signals improved market access, yet also highlights the need for competitive cost structures and hedging capabilities in an increasingly global environment.

Aluminium Surges While Copper Loses Spark Amid Metals Market Shift

In the race for future materials, aluminium is catching the copper coach.

INVESTORS AND industrial consumers are increasingly pivoting from copper to aluminium in 2025, driven by supply constraints in copper (notably in China) and growing demand for lightweight, low-carbon materials. According to Al Circle, aluminium performance improved while copper futures faced renewed pressure from trade scrutiny and ore-shortage worries.

This dynamic suggests that strategic non-ferrous supply-chains



may shift materially in the coming years—creating opportunities for producers, processors and recyclers of aluminium-based value-chains to gain ground globally.

Global Non-Ferrous Recycling Market Set for US \$230 Billion by 2030

Recycling is no longer fringe—it's the core of the future non-ferrous metals play



According to recent market intelligence, the global non-ferrous metal recycling market is projected to reach US \$225–230 billion by 2025 with a moderate CAGR through 2030. The growth is being driven by rising demand for recycled aluminium, copper and zinc in lightweight, electric-mobility and renewable-energy applications. For Indian metal processors, foundries and recyclers, this trend underscores the strategic importance of developing scrap-based supply-chains, upgrading processing technology and aligning with international sustainability / ESG credentials.

Global Nickel Market Stabilises as Indonesian Supply Expands



After two years of volatility, the global nickel market is showing signs of stability in 2025, supported by expanding Indonesian supply and moderating EV-battery demand growth. Indonesia, the world's largest nickel producer, has ramped up output by 18% year-on-year, easing shortages and reducing global price spikes.

However, analysts note growing environmental scrutiny over mining practices and call for tighter ESG compliance from producers. India's stainless steel and battery industries stand to benefit from this supply stabilisation, potentially lowering input costs.

Europe's Aluminium Smelters Struggle Amid High Power Prices

EUROPEAN ALUMINIUM smelters continue to battle elevated energy prices, with several facilities operating below 70% capacity utilisation through mid-2025. Smelters in Germany, France, and Italy have faced steep input-cost increases due to electricity market volatility, forcing producers to pass on costs to downstream manufacturers.

Industry groups warn that sustained energy inflation could drive permanent capacity closures, shifting production to Asia and the Middle East - where renewable and gas-based power remain cheaper.



China Rolls Out 2025-26 Work Plan for Non-Ferrous Metals Industry



CHINA'S GOVERNMENT, via the Ministry of Industry and Information Technology (MIIT) and seven other departments, has issued a national work plan for the non-ferrous metals sector covering 2025-26. Key targets include annual growth of ~5 % in value-added output, ~1.5 % growth in production of 10 major non-ferrous metals, and recycled-metals output

exceeding 20 million tonnes. The roadmap emphasises resource exploration (copper, aluminium, lithium, nickel, cobalt, tin), green-smelting, higher-end metal products, and digitalisation of the value-chain.

For global non-ferrous stakeholders, this marks a pivot in China from rapid expansion to controlled, efficiency-led growth — and a signal that circular-economy and high-purity metals will be increasingly prioritised. Metalworld readers should note the likely downstream ripple-effects: rising Chinese demand for scrap, higher purity-requirements, and intensifying competition in high-end alloys and recycling technologies.

ASEAN Emerges as Aluminium Scrap Hub Amid Regulatory Tightening



SOUTHEAST ASIA is fast growing as an aluminium-scrap processing region, driven by supply-chain shifts and policy changes. Countries such as Vietnam are building significant remelting capacities, converting both domestic and imported scrap (e.g., UBC & ADC12 alloys). In 2024, Vietnam suspended temporary import, re-export and transit of aluminium-scrap (HS 7602) from 2025–30, tightening impurity and traceability norms. For non-ferrous stakeholders in India and beyond, this development has two key implications: emerging regional competition for imported scrap and evolving quality standards (which may raise feedstock cost globally). For Metalworld's audience this means scrap sourcing strategy must take regional loopholes and tightening norms into account.

smelting capacity roadmap by March, citing eroding margins due to collapsed treatment & refining charges (TC/RCs) and concentrate shortage. ([Reuters][6]) JX is pivoting toward rare-metal and semiconductor-grade production, reflecting structural cost pressures in copper refining. For the global non-ferrous chain, this suggests constrained upstream supply may tighten concentrate flows, pushing scrap-based processing and intensifying price volatility critical observations for Metalworld readers tracking recycling and feedstock flows.

London Metal Exchange (LME) Proposes “Green Premium” for Certified Metals



The London Metal Exchange has taken a step toward sustainable trading by proposing a “green-premium” on metals (aluminium, copper, nickel, zinc) that meet certified sustainability

standards. ([Financial Times][5]) Through its platform partnership with Metalshub, the LME will allow traders to buy certified green metals for immediate delivery; a potential future step is dedicated green-futures contracts. Producers must meet validations from bodies such as the Aluminium Stewardship Initiative (ASI) or the Copper Mark. For Metalworld's audience, the launch underscores how sustainability credentials are becoming tradable assets and how remelters, alloy-makers and downstream players may soon earn premiums by aligning production with third-party standards.

Japanese Smelter JX Advanced to Cut Copper Output Amid Margin Pressure



JAPAN'S TOP copper smelter, JX Advanced Metals, plans to reduce electrolytic copper production by tens of thousands of tonnes in fiscal 2025 and to downscale its 450,000-tonne



Indian auto industry posts STRONG SEPTEMBER GROWTH: SIAM

INDIAN AUTOMOBILE industry witnessed strong growth in September 2025, as higher production and surging exports offset steady domestic demand across key segments, according to the latest SIAM data.

The Indian automobile industry registered broad-based growth in September 2025, with strong manufacturing activity and robust exports offsetting moderation in domestic demand for certain passenger vehicle subsegments.

According to the latest data from the Society of Indian Automobile Manufacturers (SIAM), total vehicle production stood at 30,73,654 units, marking a 10.8% increase from 27,73,039 units in September 2024.

Domestic sales across all categories rose to 25,57,757 units, up 5.6% from 24,21,368 units a year ago. Exports surged 19.8%, reaching 5,58,768 units against 4,66,409 units in September 2024.

The passenger vehicle (PV) segment delivered mixed results in September 2025, with stable domestic sales but a sharp uptick in exports. Total domestic PV sales were 3,12,791 units, compared to 3,15,689 units in September 2024 (down 0.9%).

However, exports rose 30.2%, to 87,762 units from 67,379 units a year earlier.

Domestic van sales were 10,035 units, compared with 11,908 units a year earlier. Exports grew significantly to 795 units from 322 units in September 2024.

The three-wheeler segment maintained strong momentum in September, with total domestic sales at 84,077 units, up 5.5% from 79,683 units last year.

Electric three-wheelers continued to expand their presence, accounting for nearly 11% of total domestic volumes. Exports jumped 57.7% year-on-year, reaching 40,928 units compared to 25,971 units a year earlier.

Bajaj Auto, Piaggio Vehicles, and Mahindra Last Mile Mobility led shipments, driven by strong demand from African and South American markets.

Two-wheelers: Sustained domestic momentum, solid export performance

The two-wheeler market continued its steady growth, supported by festive buying and strong rural recovery signals. Domestic sales stood at 21,60,889

units, compared to 20,25,993 units in September 2024 (+6.7%).

Exports: Strongest monthly performance of FY26

Overall, vehicle exports in September 2025 stood at 5,58,768 units, up from 4,66,409 units in September 2024 - a gain of 92,359 units (+19.8% YoY).

Exports between April–September 2025 reached 30,99,784 units, compared to 24,92,517 units during the same period last fiscal (+24.4% YoY).

A) PASSENGER VEHICLES (PV)

* Sales: 1.04 million units in Q2 FY2025–26, a de-growth of (-1.5%) vs. Q2 FY2024–25.

* September 2025: Showed a 4.4% recovery due to GST cuts, festive demand, and better consumer sentiment.

* Utility Vehicles (UVs): Continue to dominate (~two-thirds of PV market), but declined (-2.1%) YoY; passenger cars remained stable.

* Exports: Reached 2.42 lakh units, the highest ever, up 23% YoY.

B) TWO-WHEELERS (2W)

* Sales: 5.56 million units, +7.4% YoY.

* Growth drivers: Stronger economic activity, resilient rural demand, affordability improvements, and GST rate cuts.



- * Scooters: Up 12.4% YoY, leading growth.
- * Motorcycles: Grew 5% YoY.
- * Exports: Record 1.3 million units, up 25% YoY.
- C) THREE-WHEELERS (3W)
 - * Sales: Record 2.29 lakh units, +9.8% YoY, led by Passenger Carrier sub-segment.
 - * Growth factors: Expanding urban/semi-urban transport needs, easier financing, and replacement demand.
 - * Exports: 1.23 lakh units, highest in 6 years, up 51% YoY.
- D) COMMERCIAL VEHICLES (CV)
 - * Sales: 2.40 lakh units, +8.3% YoY.
 - * Drivers:
 - MHCVs: Strong freight demand.
 - LCVs: Boost from intra-city logistics.
 - * Sectoral demand: Strength in steel, cement, mining, and construction.
 - * Policy impact: GST cuts and RBI rate measures supported fleet replacement.
 - * Exports: 0.24 lakh units, +22% YoY.

While commenting on the Q2 2025-26 performance, Mr Shailesh Chandra, President, SIAM said, "The GST 2.0 reform is a landmark decision of the Government of India, which apart from catapulting the Indian auto industry to the next level, would bring in vibrancy in the entire economy, as this industry is closely intertwined with strong forward and backward linkages. Inspite of the new GST rates coming into effect from 22nd of September, i.e. only for 9 days of the month, Passenger Vehicles, Two-Wheelers and Three-Wheelers have already posted their highest ever sales of September. In addition, very strong exports growth, in all segments in Q2, indicates the growing brand acceptance on Indian made vehicles.

Looking ahead, the outlook for the sector remains encouraging on the back of key tailwinds," Commenting on the performance of Q2 of 2025-26, Mr Rajesh Menon, Director General, SIAM said, "Sales of Passenger Vehicles in Q2 of 2025-26 degrew by (-) 1.5%, posting sales of 1.04 million units as compared to Q2 of previous year. Sales of Three-Wheelers in Q2 of 2025-26 grew by 9.8% compared to last year, with 2.29 Lakh units, which is the highest ever in Q2. Two-Wheelers registered a growth of 7.4% in this Quarter, compared to last year, with sales of 5.56 million units while Commercial Vehicles grew by 8.3% in Q2, compared to Q2 of last financial year, with sales of 2.40 Lakh units." ■



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

Report by SIMA
Report III
Numbers of Vehicles

CATEGORY SEGMENT / SUBSEGMENT MANUFACTURER	PRODUCTION				DOMESTIC SALES				EXPORTS			
	SEPTEMBER		APRIL-SEPTEMBER		SEPTEMBER		APRIL-SEPTEMBER		SEPTEMBER		APRIL-SEPTEMBER	
	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.	4,105	5,766	24,025	25,686	3,715	3,105	19,144	15,847	398	1,453	9,218	5,600
Hyundai Motor India Ltd.	27,563	27,700	1,67,780	1,61,678	15,191	14,234	95,714	82,029	11,320	16,464	69,607	83,971
Maruti Suzuki India Ltd.	82,255	1,05,619	5,37,539	5,45,502	71,505	74,090	4,32,349	4,11,801	13,355	18,694	70,510	1,00,456
Nissan Motor India Pvt. Ltd.	5,196	2,819	27,195	14,316	-	-	-	-	5,863	4,494	26,764	13,379
Renault India Pvt. Ltd.	963	549	7,314	5,967	691	512	4,213	2,596	1,262	90	3,293	3,075
Skoda Auto India Pvt. Ltd.	1,678	1,675	7,688	5,571	1,392	1,339	7,349	6,400	-	5	13	8
Tata Motors Ltd.*	NA	NA	88,094	71,131	NA	NA	64,969	66,719	NA	NA	953	2,512
Toyota Kirloskar Motor Pvt. Ltd.	144	292	851	1,544	3,373	3,436	26,572	26,285	-	-	-	-
Volkswagen India Pvt. Ltd.	3,505	3,966	32,922	31,408	1,697	1,648	9,788	10,209	3,223	2,515	24,733	20,280
Total A: Passenger Cars	1,25,409	1,48,386	8,73,288	8,62,803	97,564	98,364	6,60,098	6,21,886	35,421	43,715	2,05,091	2,29,281
B : Utility Vehicles												
FCA India Automobiles Pvt. Ltd.	594	592	3,274	2,797	365	250	1,977	1,364	231	362	1,204	1,640
Force Motors Ltd.	136	213	1,077	928	89	223	903	943	-	11	10	17
Honda Cars India Ltd.	6,665	4,044	30,945	15,588	1,960	2,198	10,458	9,284	4,841	1,340	22,557	7,643
Hyundai Motor India Ltd.	36,030	34,309	2,21,793	2,11,444	35,910	37,313	2,03,380	1,89,751	1,780	2,336	15,293	15,569
Isuzu Motors India Pvt. Ltd.	29	-	349	106	32	34	182	141	58	-	58	-
JSW MG Motor India Pvt. Ltd.	2,341	24	13,332	4,168	2,340	534	16,998	4,904	-	-	-	-
Kia India Pvt. Ltd.	25,700	25,800	1,30,811	1,48,891	23,523	22,700	1,27,321	1,31,006	2,006	2,606	14,828	13,666
Mahindra & Mahindra Ltd.	46,110	57,150	2,60,416	3,20,010	51,062	56,233	2,60,210	2,97,570	1,528	2,481	5,531	10,832
Maruti Suzuki India Ltd.	62,752	79,496	3,82,406	4,13,514	61,549	48,695	3,43,665	3,17,379	13,859	22,502	72,908	1,00,218
Nissan Motor India Pvt. Ltd.	4,247	5,248	21,283	35,569	2,113	1,652	13,087	8,948	1,653	4,373	6,295	24,226
Renault India Pvt. Ltd.	2,670	6,254	18,594	17,814	2,526	3,753	15,823	14,988	1,489	1,510	3,071	3,724
Skoda Auto India Pvt. Ltd.	2,187	3,777	7,685	28,588	1,913	5,297	8,860	29,817	51	144	661	790
Stelliantis India Pvt. Ltd.	1,279	1,069	3,739	2,696	711	734	3,579	2,913	61	540	2,259	3,771
Tata Motors Ltd.*	NA	NA	2,07,934	2,00,892	NA	NA	2,03,065	1,97,309	NA	NA	448	2,666
Toyota Kirloskar Motor Pvt. Ltd.	32,492	38,858	1,93,162	2,03,786	20,427	23,644	1,23,683	1,39,663	3,045	4,002	12,288	18,880
Volkswagen India Pvt. Ltd.	2,710	2,984	19,248	17,058	1,697	1,132	10,172	7,290	1,034	1,045	10,346	7,731
Total B : Utility Vehicles	2,25,942	2,59,818	15,23,145	16,23,849	2,06,217	2,04,392	13,43,363	13,53,270	31,636	43,252	1,67,757	2,11,373
C : Van												
Mahindra & Mahindra Ltd.	25	-	90	21	-	-	-	-	-	15	75	30
Maruti Suzuki India Ltd.	11,702	13,201	72,608	73,465	11,908	10,035	68,600	66,266	322	780	3,645	5,089
Tata Motors Ltd.*	NA	NA	7,103	9,933	NA	NA	9,082	9,660	NA	NA	111	111
Total C : Vans	11,727	13,201	79,799	83,419	11,908	10,035	77,682	75,926	322	795	3,831	5,230
Total Passenger Vehicles	3,63,078	4,21,405	24,76,232	25,70,071	3,15,689	3,12,791	20,81,143	20,51,082	67,379	87,762	3,76,679	4,45,884



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	SEPTEMBER		APRIL-SEPTEMBER		SEPTEMBER		APRIL-SEPTEMBER		SEPTEMBER		APRIL-SEPTEMBER	
	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	1,502	1,639	6,361	7,836	1,161	1,199	4,805	5,640	285	532	1,089	1,731
Bajaj Auto Ltd	63,750	72,986	3,10,940	3,50,765	46,948	46,914	2,21,244	2,20,233	15,870	26,846	86,987	1,33,795
Baxy Ltd	109	27	488	656	118	247	503	513	-	20	-	120
Force Motors Ltd	-	-	672	-	-	-	-	-	-	-	630	-
Mahindra & Mahindra Ltd	6,502	11,268	27,801	44,257	7,319	10,937	27,294	44,007	72	36	204	468
Piaggio Vehicles Pvt Ltd	8,996	6,515	44,051	38,595	7,211	5,919	36,514	29,378	1,146	1,726	6,314	8,936
Pinnacle Mobility Solutions P.L.	-	53	-	217	-	23	-	54	-	-	-	-
TI Clean Mobility Pvt Ltd	882	929	3,859	3,388	752	746	3,796	3,555	-	-	-	2
TVS Motor Company Ltd	11,715	19,495	68,680	1,00,624	2,317	5,672	12,307	26,695	8334	11,464	56,070	71,459
Total A: Passenger Carrier	93,456	1,13,155	4,62,852	5,46,338	65,826	71,657	3,06,463	3,30,075	25,707	40,624	1,51,294	2,16,511
E-Rickshaw												
Atul Auto Ltd	741	346	3,309	1,966	585	330	3,165	2,011	-	-	-	-
Bajaj Auto Ltd	-	104	-	574	-	160	-	514	-	-	-	-
Baxy Ltd	353	255	1,327	866	356	242	1,447	1,075	-	-	-	22
Mahindra & Mahindra Ltd	2,597	1,154	7,631	2,854	1,378	940	6,334	3,062	17	-	17	-
TI Clean Mobility Pvt Ltd	-	-	-	1	-	-	-	-	-	-	-	1
Total E-Rickshaw	3,691	1,859	12,267	6,261	2,319	1,672	10,946	6,662	17	-	17	23
B: Goods Carrier												
Atul Auto Ltd	900	1,183	5,711	6,363	1,046	1,233	5,319	5,757	14	-	33	80
Bajaj Auto Ltd	5,115	5,322	29,337	30,714	5,603	4,990	26,683	28,930	40	225	920	1,889
Baxy Ltd	156	100	680	350	146	130	695	318	-	-	-	-
Mahindra & Mahindra Ltd	1,519	995	7,335	6,605	1,287	1,090	6,513	5,394	140	8	404	119
Piaggio Vehicles Pvt Ltd	2,750	2,431	15,694	14,970	2,795	2,930	15,106	14,737	34	71	356	435
TI Clean Mobility Pvt Ltd	-	75	-	211	-	64	-	193	-	-	-	-
TVS Motor Company Ltd	47	6	340	269	33	5	187	54	19	-	175	219
Total B: Goods Carrier	10,487	10,112	59,097	59,482	10,910	10,442	54,503	55,383	247	304	1,888	2,742
E-Cart												
Atul Auto Ltd	223	215	1,046	819	270	209	1,007	959	-	-	-	-
Baxy Ltd	304	41	425	254	298	47	407	256	-	-	-	-
Mahindra & Mahindra Ltd	84	95	320	1,153	60	50	473	1,115	-	-	-	-
Total E-Cart	611	351	1,791	2,226	628	306	1,887	2,330	-	-	-	-
Total Three Wheelers	1,08,245	1,25,477	5,36,007	6,14,307	79,683	84,077	3,73,799	3,94,450	25,971	40,928	1,53,199	2,19,276



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	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	17,317	26,789	67,354	1,12,863	16,582	25,137	64,718	1,09,897	80	1,034	320	1,776
Bajaj Auto Ltd	30,240	31,433	1,29,982	1,22,279	32,017	30,958	1,27,941	1,20,876	-	-	2	21
Hero MotoCorp Ltd	46,376	61,373	1,97,527	2,54,384	38,496	57,662	1,82,755	2,41,241	1,024	3,794	14,994	14,718
Honda Motorcycle & Scooter I Pvt Ltd	3,18,709	2,84,228	17,42,004	17,22,389	2,97,686	2,61,553	15,83,760	14,39,169	30,834	34,421	1,72,290	1,78,977
India Yamaha Motor Pvt Ltd	37,341	38,560	1,96,101	1,73,653	30,175	36,136	1,61,462	1,51,711	5,784	3,842	33,724	32,377
Okinawa Autotech Pvt. Ltd	1,060	NA	1,446	112	1,004	NA	1,320	73	-	-	-	-
Piaggio Vehicles Pvt Ltd	4,406	3,330	24,616	21,587	2,737	2,330	16,100	14,683	1,228	1,585	8,506	6,744
Suzuki Motorcycle India Pvt Ltd	83,413	1,11,357	5,38,807	5,89,990	75,263	1,05,344	5,05,281	5,63,387	6,962	4,728	29,868	30,204
TVS Motor Company Ltd	1,73,330	2,29,031	8,84,641	11,27,009	1,78,454	2,14,271	8,53,963	10,80,672	8,297	4,657	54,829	57,598
Total A: Scooters	7,12,192	7,86,101	37,82,478	41,24,266	6,72,414	7,33,391	34,97,300	37,21,709	54,209	54,061	3,14,533	3,22,604
B: Motorcycles												
Bajaj Auto Ltd	3,56,808	4,01,210	18,24,820	19,25,740	2,27,316	2,42,230	10,91,357	10,05,044	1,41,156	1,57,665	7,64,825	8,91,648
Hero-MotoCorp. Ltd..	5,80,306	5,70,343	28,53,708	27,92,443	5,78,210	5,89,929	27,57,911	26,40,543	19,316	35,844	99,174	1,61,282
Honda Motorcycle & Scooter I Pvt Ltd	2,55,318	2,65,817	14,18,617	13,84,358	2,38,705	2,44,140	12,97,659	12,42,869	16,408	28,050	1,04,668	1,32,540
India Kawasaki Motors Pvt Ltd	304	168	1,575	1,020	411	368	2,012	2,202	-	-	-	-
India Yamaha Motor Pvt Ltd	56,350	65,007	3,15,055	3,12,673	36,530	37,171	2,07,103	1,69,703	24,353	24,006	1,02,989	1,38,770
Piaggio Vehicles Pvt Ltd	564	531	6,859	5,803	274	472	2,071	1,491	70	238	4,497	4,337
Royal-Enfield (Unit of Eicher Motors)	68,872	1,13,467	4,80,570	6,07,929	79,326	1,13,573	4,10,843	5,21,482	7,652	10,775	43,936	70,441
Suzuki Motorcycle India Pvt Ltd	16,537	16,406	86,661	99,612	2,000	542	11,249	7,085	14,960	12,936	73,477	87,498
Triumph Motorcycles I Pvt Ltd	40	19	230	77	123	65	654	376	-	-	-	-
TVS Motor Company Ltd	2,07,517	2,57,271	10,88,185	13,23,239	1,35,715	1,45,260	6,27,028	6,83,149	93,553	1,04,361	4,48,238	6,10,642
Total B: Motorcycles	15,42,616	16,90,239	80,76,280	84,52,894	12,98,610	13,73,750	64,07,887	62,73,944	3,17,468	3,73,875	16,41,804	20,97,158
C: Mopeds												
TVS Motor Company Ltd	46,550	49,924	2,60,565	2,49,381	54,969	53,748	2,59,793	2,40,986	804	1,626	2,808	12,648
Total C: Mopeds	46,550	49,924	2,60,565	2,49,381	54,969	53,748	2,59,793	2,40,986	804	1,626	2,808	12,648
Total Two Wheelers	23,01,358	25,26,264	1,21,19,323	1,28,26,541	20,25,993	21,60,889	1,01,64,980	1,02,36,639	3,72,481	4,29,562	19,59,145	24,32,410
Quadricycle												
Bajaj Auto Ltd	358	508	3,512	2,216	3	-	107	4	578	516	3,494	2,214
Total Quadricycle	35	508	3,512	2,216	3	-	107	4	578	516	3,494	2,214
Grand Total	27,73,039	30,73,654	1,51,35,074	1,60,13,135	24,21,368	25,57,757	1,26,20,029	1,26,82,175	4,66,409	5,58,768	24,92,517	30,99,784



Sub-segment & Company wise Production, Domestic Sales & Exports Report for the month of September 2025 and Cumulative for April-September 2025

Report by SIMA
Report IV
Numbers of Vehicles

CATEGORY SEGMENT / SUBSEGMENT MANUFACTURER	PRODUCTION				DOMESTIC SALES				EXPORTS			
	SEPTEMBER		APRIL-SEPTEMBER		SEPTEMBER		APRIL-SEPTEMBER		SEPTEMBER		APRIL-SEPTEMBER	
	2024	2025	2024-25	2025-26	2024	2025	2024-25	2025-26	2024	2025	2024-25	2025-26
Passenger Vehicles												
A: Passenger Cars - Upto 5 Seats												
Mini: Seats upto-5, Length Normally <3600 mm, Body Style-Hatchback, Engine Displacement Normally upto 1.0 Litre												
Maruti Suzuki I Ltd (Alto, Spresso)	12,155	12,318	76,294	60,284	10,363	7,208	61,787	40,405	2,962	3,244	14,527	18,336
Renault India Pvt Ltd (Kwid)	963	549	7,314	5,967	691	512	4,213	2,596	1,262	90	3,293	3,075
Total Mini	13,118	12,867	83,608	66,251	11,054	7,720	66,000	43,001	4,224	3,334	17,820	21,411
Compact: Seats upto-5, Length Normally between 3600-4000 mm, Body Style-Sedan/Estate/Hatch/Notchback, Engine Displacement Normally upto 1.4 Litre												
Honda Cars India Ltd (Amaze)	2,607	3,669	13,527	16,357	2,820	2,609	13,537	12,662	60	120	540	541
Hyundai Motor I Ltd (Aura, Grand i10, i20)	21,037	21,049	1,31,450	1,24,478	13,993	13,509	87,525	76,959	6,457	10,382	42,546	51,300
Maruti Suzuki I Ltd (OEM Model#, Baleno)	68,413	93,301	4,51,768	4,85,218	60,480	66,882	3,66,421	3,69,416	9,542	15,450	51,287	81,737
Tata Motors Ltd* (Altroz, Tiago, Tigor)	NA	NA	68,094	71,131	NA	NA	64,969	66,719	NA	NA	953	2,512
Toyota Kirloskar Motor Pvt Ltd (Glanza)	-	-	-	-	3,246	3,299	25,721	25,243	-	-	-	-
Total Compact	92,057	1,18,019	6,64,839	6,97,184	80,539	86,299	5,58,173	5,50,999	16,059	25,952	95,326	1,36,090
Mid-Size: Seats upto-5, Length Normally between 4250-4500 mm, Body Style-Sedan/Estate/Hatch/Notchback, Engine Displacement Normally upto 1.6 Litre												
Honda Cars India Ltd (City)	1,498	2,097	10,498	9,329	895	496	5,607	3,185	338	1,333	8,678	5,059
Hyundai Motor India Ltd (Verna)	6,526	6,651	36,330	37,200	1,198	725	8,188	5,070	4,863	6,082	27,061	32,671
Maruti Suzuki India Ltd (Ciaz)	1,687	-	9,477	-	662	-	4,141	1,980	851	-	4,696	383
Nissan Motor India Pvt Ltd (Sunny)	5,196	2,819	27,195	14,316	-	-	-	-	5,863	4,494	26,764	13,379
Volkswagen India Pvt Ltd (Virtus)	3,505	3,966	32,922	31,408	1,697	1,648	9,788	10,209	3,223	2,515	24,733	20,280
Total Mid-Size	18,412	15,533	1,16,422	92,253	4,452	2,869	27,724	20,444	15,138	14,424	91,932	71,772
Executive : Seats upto-5, Length Normally between 4500-4700 mm, Body Style-Sedan/Estate/Notchback, Engine Displacement Normally upto 2 Litre												
SkodaAuto India Pvt Ltd (Slavia)	1,678	1,675	7,568	5,571	1,392	1,339	7,328	6,396	-	5	13	8
Total Executive	1,678	1,675	7,568	5,571	1,392	1,339	7,328	6,396	-	5	13	8
Premium: Seats upto-5, Length Normally between 4700-5000 mm, Body Style-Sedan/Estates, Engine Displacement Normally upto 3 Litre												
SkodaAuto India Pvt Ltd (Superb)	-	-	-	-	-	-	21	4	-	-	-	-
Toyota Kirloskar Motor Pvt Ltd (Camry)	144	292	851	1,544	127	137	851	1,042	-	-	-	-
Total Premium	144	292	851	1,544	127	137	872	1,046	-	-	-	-
Luxury : Seats upto-5, Length Normally Over 5000 mm												
Hyundai Motor India Ltd (Other)	-	-	-	-	-	-	1	-	-	-	-	-
Total Luxury	-	-	-	-	-	-	1	-	-	-	-	-
Total Passenger Cars	1,25,409	1,48,386	8,73,288	8,62,803	97,564	98,364	6,60,098	6,21,886	35,421	43,715	2,05,091	2,29,281

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