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"Our vision is to make the Eastern Region a benchmark cluster for disciplined, quality-driven and technology-oriented foundries"

Goutam Dutta
Chairman, Eastern Region
The Institute of
Indian Foundrymen

"India is now the preferred casting partner for many global buyers - quality, reliability, and ease of business are key differentiators."

Chandan Panda
Director - Sales & Marketing
Gargi Hüttenes-Albertus Pvt. Ltd.

- **Foundries Strengthen Sand Reclamation Capabilities as Circularity Gains Importance**
- **Q2 FY2025–26 Base Metals Performance Review**
- **Demand for High-Performance Binders Rises as Foundries Pursue Lower Emissions and Better Casting Quality**
- **India's automobile sales up by 40% on festive demand, tax cuts**

Skimmer,Ladle & Sampling Spoon

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Devoted to Foundry & Non-Ferrous Metals Industry

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D.A. Chandekar
Editor

Metal recycling has become a crucial practice in recent years, driven by the rapid depletion of natural resources and increasing environmental concerns. Ancient civilizations laid the foundation for modern metallurgy, but our planet's resources are depleting rapidly. Iron ore, bauxite, and coal reserves have limited life spans, making metal recycling mandatory.

Recycling isn't limited to metals; even water used in metal plants is being recycled. This not only conserves resources but also reduces environmental pollution. Various technologies and processes are being developed to maximize metal recycling, including hydrometallurgy and sensor-based sorting. These innovations enable efficient metal extraction, reduce waste, and promote sustainability.

The future of humanity depends on how wisely we use Mother Earth's resources and achieve recycling goals. Metal recycling is crucial for a sustainable future, reducing our reliance on primary metal production, conserving resources, and mitigating environmental impacts. By adopting recycling practices, we can create a circular economy where metals are recycled, reused, and repurposed efficiently.

Recycling metal requires collective effort from industries, governments, and individuals. Governments can implement policies supporting recycling, industries can invest in recycling technologies, and individuals can participate in recycling programs. Together, we can make a significant impact and ensure a sustainable future for generations to come.

Content

FACE TO FACE

NEWS MAKERS

Feedback:
Your feedback / suggestions regarding the content will be appreciated
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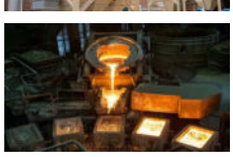
NEWS UPDATES - GLOBAL

FOUNDRY UPDATE



INDUSTRY UPDATE

STATISTICS

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PRODUCT RANGE

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- Granular Fluxes
- Tablet Grain Refiner
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"Our vision is to make the Eastern Region a benchmark cluster for disciplined, quality-driven and technology-oriented foundries"

Goutam Dutta
Chairman, Eastern Region
The Institute of Indian Foundrymen

Goutam Dutta is Post Graduate in Economics and Foundry entrepreneur with over 25 years experience in Foundry. He is CEO of Met Alloy Corporation, specialized in C.I. Castings for use of Power Plant, Furnace Division, Pump & Pump spares and other specialized castings.

He worked in depeartmental project "Performance Appraisal of Management Graduates. He also worked in the Indo - Dutch project "Rural Development and Devolution of Power in West Bengal. Engaged in policy oriented study in the Small Scale Sector in West Bengal of IIM Ahmedabad. Worked in "National Renewal Fund Project on Rehabilitation of Rationalised workers sponsored by Department of Industrial Development, Ministry of Industries.

Currently, he is serving as Chairman, Eastern Region of The Institute of Indian Foundrymen.

Present condition of the Eastern Indian foundry industry

The Eastern Indian foundry industry today is in a phase of stable but cautious growth. Capacity utilisation for most organised foundries is reasonably healthy, though it varies by segment. Foundries supplying to railways, automotive, infrastructure, and capital goods are seeing better order visibility, while purely commodity-driven and jobbing foundries still face margin pressures.

Three key factors are shaping the industry this year:

1. Cost pressures on inputs : Rising costs of ferro-alloys, coke, power, refractories, and logistics continue to squeeze margins.

2. Customer expectations on quality & delivery : Large OEMs now demand global-class quality, traceability and on-time delivery, which pushes foundries to invest in better processes and systems.

3. Gradual shift from unorganised to organised : Customers are preferring compliant, reliable, and technology-oriented foundries. This is creating opportunities for serious players who are willing to invest and scale.

Overall, the sentiment is positive, but the industry is very clear that the next wave of growth will come only through productivity, technology, and professionalism, not just by adding more capacity.

Managing rising input costs & improving efficiency

Input costs in our region have been structurally high – especially power tariffs, logistics, and metallurgical inputs. Foundries which are surviving and growing are doing three things consistently:

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We Also Manufacture Foundry Machinery, Metal Testing Equipment.

1. Strong cost accounting & data discipline

- Moving from "rough estimates" to activity-based costing and heat-wise costing.

- Tracking material yield, energy per ton, rejection, rework, and downtime on a daily / weekly dashboard.

2. Process optimisation rather than only rate negotiation

- Improving yield through better gating & risering design.

- Reducing rejections by focusing on mould quality, core quality, and fettling practices.

- Investing in preventive maintenance to reduce breakdowns.

3. Collaborating more closely with suppliers & customers

- Long-term rate contracts with key suppliers wherever possible.

- Early involvement with customers in design stage to optimise casting design and avoid costly changes later.

In short, Eastern Region foundries are realising that the only sustainable way to fight cost escalation is to become more efficient internally, not just keep asking for price increases from customers.

Progress of digital tools, automation & Industry 4.0

We are still at a very early but encouraging stage of Industry 4.0 in the Eastern Region. Only a few larger foundries have gone for full-fledged digitalisation, but many MSME units have started with small, practical steps, such as:

· Basic production planning and tracking on software / cloud-based tools instead of manual registers.

· Using SCADA / PLC-based controls on melting, sand plants, and moulding lines.

· Introducing pattern & tooling traceability, barcode-based material tracking, and digital inspection reports.

· Remote support from OEMs of moulding lines, furnaces, and sand plants through online diagnostics.

At IIF, our approach has been to demystify Industry 4.0 for foundry owners. We encourage them to start with:

1. Data discipline – capturing accurate, real-time shop-floor data.

2. Simple automation – where payback is clear, such as ladle handling, shot-blasting, and finishing operations.

3. Gradual integration – connecting melting, moulding, and quality labs onto a common digital backbone over time.

The direction is very clear – data-driven decision making will separate competitive foundries from the rest in the coming 3–5 years.

> ***Eastern Region foundries are realising that the only sustainable way to fight cost escalation is to become more efficient internally, not just keep asking for price increases from customers.***

Practical steps for sustainability & cleaner production

Sustainability for Indian foundries must be practical, phased, and cost-sensitive. Some very actionable steps are:

1. Energy efficiency

- Upgrading to energy-efficient induction furnaces, improving power factor, and reducing idle holding.

- Heat recovery in certain processes, and disciplined shutdown practices.

2. Sand management

- Investing in better sand reclamation and sand testing to reduce wastage.

- Proper disposal and re-use of waste sand in construction / roadwork where possible, following local norms.

3. Emission & housekeeping

- Effective fume extraction, bag filters, and dust collection systems.

- Strong housekeeping, organised scrap yards, and clean surroundings – small changes that create a big impact.

4. Water & resource conservation

- Closed-loop water circuits for cooling.

- Regular maintenance to avoid leakages and wastage.

5. Mindset shift

- Sustainability is not just for "big plants" – even MSMEs can begin with no-cost, low-cost practices and then move to bigger investments when the business allows.

If we position sustainability as a productivity and reputation enhancer, not just a compliance burden, more foundries will willingly adopt it.

Support needed by MSME foundries

MSME foundries are the backbone of the Indian casting ecosystem, but they are stretched on all fronts – finance, manpower, and time. They need support on three main pillars:

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1. Financial support

- Easier access to term loans and working capital at realistic interest rates.

- Special schemes for technology upgradation, pollution control, and energy-efficiency projects, with part subsidy or interest subvention.

2. Technical & managerial support

- Cluster-based programmes for methoding, metallurgy, sand control, quality systems, and maintenance.

- Shared facilities like common testing labs, design & simulation centres, and training centres.

3. Policy & ecosystem support

- Stable and predictable policies on power, environment, and logistics.

- Faster approvals, single-window clearances, and encouragement for export-oriented units.

Most importantly, MSME foundries need hand-holding rather than one-time seminars – ongoing mentoring, peer learning and practical, shop-floor-oriented interventions.

New opportunities in castings with growing demand

The opportunity landscape for Indian castings is expanding with changes in automotive, engineering, railways, renewables, defence, and infrastructure. Some promising areas are:

1. Railways & Metro: Castings for freight wagons, metro projects, and high-speed rail infrastructure.

2. Renewable energy: Components for wind turbines, solar mounting structures, and energy storage equipment.

3. EV & new mobility: Lightweight, high-precision castings for EV powertrain, braking, and suspension systems.

4. Capital goods & construction equipment: As India invests in infrastructure, demand for heavy castings will rise.

5. Exports: With global customers adopting a China+1 strategy, Indian foundries that can offer quality, reliability, and cost-competitiveness have a strong window of opportunity.

If we focus on design capability, consistent quality, and delivery discipline, Eastern Indian foundries can significantly increase their participation in these high-value segments.

Focus areas as Chairman / Leader in IIF Eastern Region

As a key office bearer of IIF in the Eastern Region, my focus is on strengthening the ecosystem rather than only individual units. Some core priorities for this year are:

1. Training & Skill Development

- Regular technical sessions, workshops, and plant clinics on metallurgy, sand, methoding, energy, and maintenance.

- Special programmes for shop-floor supervisors, young engineers, and next-generation entrepreneurs.

2. Technology Adoption & Best-Practice Sharing

- Encouraging units to visit benchmark foundries and learn from their layouts, systems, and culture.

- Showcasing practical case studies of Industry 4.0, energy saving, and rejection reduction from within our region.

3. Networking & Collaboration

- Creating stronger connections between foundries, OEMs, equipment suppliers, and consultants.

- Using platforms like IFC, IFEX, and regional conferences to bring global thought leadership to our members.

4. Voice of the Industry

- Actively representing the issues of Eastern Region foundries in matters of power tariff, logistics, environment and finance with relevant authorities.

- Promoting the message that Indian foundries are strategic partners in the country's manufacturing ambition, not just vendors.

Our vision is to make the Eastern Region a benchmark cluster for disciplined, quality-driven and technology-oriented foundries, capable of serving both domestic and global customers with confidence. ■

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"India is now the preferred casting partner for many global buyers - quality, reliability, and ease of business are key differentiators."

Chandan Panda
Director - Sales & Marketing
Gargi Hüttenes-Albertus Pvt. Ltd.

Currently, Mr. Chandan Panda is Director-Sales & Marketing, HA Global - PM Leads and National Council Member of IIF. He leads strategic initiatives in sales, marketing, and product management, driving growth and innovation for the company and its partners.

Mr. Panda holds a Degree in Chemistry (Honors), B.Tech in Chemical Engineering with specialization in Polymer Science& Technology, M. Tech in Production Engineering, and MBA in Marketing.

With over 25 years of experience in the foundry industry, Mr. Panda has specialized in foundry binders, special refractory coatings, and auxiliary chemicals contributing significantly to technological advancements in this domain. His expertise has earned him recognition across global markets.

Throughout his career, Mr. Panda has interacted extensively with foundries in South Africa, Southeast Asia, Saudi Arabia, UAE, Bahrain and Taiwan, providing technical solutions and driving innovation. He is a regular participant at leading international exhibitions such as GIFA, ANKIROS, and IFEX, and serving as a National Council Member of the Institute of Indian Foundrymen (IIF) in tenure of 2023-24 and 2025-26.

He has presented numerous technical papers at prestigious forums including Metal Casting Conference (South Africa), IFC, Foundry Conclave, Sourecon, NFD, GDC Tech, CFER, and other industry events, reinforcing his thought leadership in the field.

I thank Metalworld for the opportunity to share my views on the Indian foundry business. India is entering a major phase of growth on its path to becoming a $5 trillion economy by 2026. Rising demand from automotive, infrastructure, defence, and manufacturing has strengthened the metal casting market, while new export opportunities in aerospace and defence are opening up. Initiatives like "Make in India" and "Atmanirbhar Bharat" have further supported this expansion. At Gargi HA, we see ourselves as a technology partner to Indian foundries—focused on enabling precision, efficiency, and environmental compliance.

The Indian foundry industry is projected to grow significantly by 2028. What are the strongest demand drivers behind this growth, and which end-use sectors will shape the next phase of expansion?

Together into a Sustainable Future

Modern castings need cores of all complexity. **Gargi Hüttenes-Albertus** products combine excellent performance, consistency and environmental compatibility to add value to your casting.

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"India is now the preferred casting partner for many global buyers quality, reliability, and ease of doing business are key differentiators."

The Indian foundry industry's growth is being driven by rising domestic industrial demand, strong government support, and increasing export momentum. Policies such as Make in India, PLI schemes, and higher infrastructure spending are boosting manufacturing, while global OEMs are shifting sourcing to India due to quality, reliability, and geopolitical diversification.

Indian foundries are also investing heavily in automation, digital tools, and sustainability practices to meet international standards. Export demand particularly from the US and Europe is a major contributor, as global buyers increasingly view India as a stable supply base.

Key sectors driving expansion:

- Automotive: The largest consumer of castings. EV adoption is increasing demand for lightweight aluminium and magnesium castings.

- Construction & Infrastructure: Massive public investment in roads, railways, metros, and urban development is driving demand for pumps, valves, machinery and cast components.

- Industrial Machinery: Pumps, diesel engines, compressors, and general engineering remain steady users

of castings.

- Renewable Energy: Wind and solar components present large opportunities.

- Aerospace & Defence: High-growth segments requiring precision castings boosted by India's increased defence exports after recent geopolitical developments.

Lightweighting and the EV transition are reshaping materials globally. How will the shift toward aluminium, magnesium, and advanced alloys influence the Indian casting industry over the next three years?

"Lightweighting is no longer a trend it is a necessity for EV and next-gen mobility."

The shift to lighter materials will significantly accelerate demand for non-ferrous castings. Aluminium usage will grow rapidly, supported by India's expanding EV market and rising production of battery casings, motor housings, and structural components. Magnesium, though smaller in scale, is gaining traction due to its superior strength-to-weight ratio and its role in next-generation automotive parts.

The transition away from ferrous ICE components like engine blocks and cylinder heads means foundries dependent on these products must diversify quickly. This shift encourages higher adoption of advanced processes such as HPDC, vacuum die casting, and semi-solid casting.

Sustainability will also be a major driver. OEMs are pushing for greater use of recycled aluminium, which reduces energy consumption and carbon footprint. Overall, the move toward non-ferrous alloys presents a major growth opportunity for foundries willing to invest in new technologies and capabilities.

Industry 4.0 tools are being adopted rapidly. Where do Indian foundries stand in terms of digital maturity, and which technologies will be essential to

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stay competitive?

"Digital twins and simulation tools are redefining what's possible in casting design."

Digital adoption in Indian foundries is mixed. Large foundries are progressing well with automation, monitoring systems, and simulation tools, while many MSMEs remain in early stages due to cost and skill limitations. Government initiatives like SAMARTH Udyog Bharat 4.0 are helping bridge this gap.

Key technologies required for competitiveness:

- AI & Machine Learning: For predictive maintenance, automated defect detection, process optimization, and energy management.

- Automation & Robotics: Essential for repetitive and hazardous tasks, improving productivity and safety.

- Digital Twins & Simulation: Crucial for optimizing mould design, material flow, and trial-run reduction saving time and reducing defects.

- Additive Manufacturing: Enables faster prototyping, complex geometries, and reduced tooling requirements, especially for aerospace and EV components.

By adopting these technologies, Indian foundries can significantly enhance quality, efficiency, and global competitiveness.

Cost volatility, environmental compliance, and skilled manpower shortages remain major challenges. What steps should foundries take to address these constraints while maintaining efficiency and profitability?

"Indian foundries must shift from cost-led competition to value-led differentiation."

To manage cost volatility, foundries must build more resilient supply chains through supplier diversification, better inventory planning, and long-term contracts. Improving material utilization, energy management, and process efficiency can further reduce costs.

Environmental compliance has become critical. Foundries should invest in pollution control systems, efficient induction furnaces, and improved waste management. Practices such as regenerated sand usage, wastewater treatment, and recycling of materials reduce environmental burden and operational costs.

Manpower shortages require a combination of automation and skill development. Automation can take over repetitive tasks, while upskilling programs ensure workers can operate modern equipment. Partnerships with technical institutes can help create steady talent pipelines. Improving workplace conditions and career development opportunities will also help attract younger workers.

Digitizing workflows using cloud-based systems, ERP tools, and real-time monitoring can streamline operations and make foundry workplaces future-ready.

With global supply chain uncertainties, how should Indian foundries position themselves to secure export opportunities, especially as buyers increasingly prefer India over China?

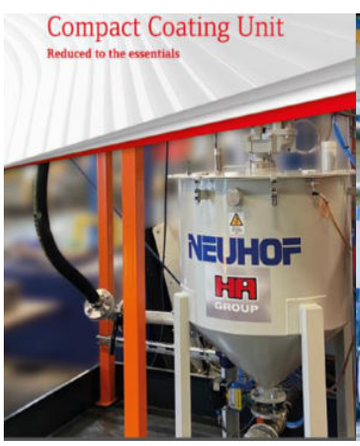
Indian foundries can strengthen export prospects by investing in technology, meeting global quality expectations, and targeting high-growth sectors. India's advantages English-speaking workforce, reliability, ease of business, and improving logistics already make it an attractive sourcing destination.

Key strategies include:

1. Technology & Quality

- Implement Industry 4.0 tools for quality consistency.

- Adopt lean manufacturing to



April 2026: wire & Tube in Düsseldorf

Welcome to the world's leading trade fairs for wire, cable and tube technologies

From 13 to 17 April 2026, the world's leading trade fairs wire & Tube will once again be joining forces in Düsseldorf: around 2,700 international exhibitors from the wire, cable and tube industries will be presenting their products and solutions on approximately 120,000 square metres of exhibition space.

For these essential global industries, face-to-face interaction is more important than ever in these economically and geopolitically turbulent times. 'Düsseldorf is the ultimate trade fair location when it comes to presenting innovations to a broad international audience from around 135 countries. This is where relationships get strengthened and new customers and partners are found,' promises Daniel Ryfisch, Director wire/Tube & Flow Technologies at Messe Düsseldorf.

Exciting core topics and special areas

In addition to classic topics such as machines and production facilities and their end products, wire & Tube 2026 will focus on the **key topics of 'AI & Robotics' and 'Energy Transition & Renewable Energies'**. Innovation leaders will demonstrate how intelligent automation and IoT networking, machine learning, 'smart manufacturing' and modern robotic systems are making numerous processes more efficient and safer.

Regarding the energy transition, international thought leaders at Tube will showcase and discuss forward-looking solutions in hydrogen infrastructure, CO_2 transport, photovoltaics, wind power, decarbonisation and more. After all, pipes and tubes play a key role in the implementation of sustainable energy systems. Following its debut in 2024, visitors will once again find concentrated plastic pipe and tube expertise along the value chain in the **'Plastic Tubes & Pipes Area'** in Hall 1 this year.

The wire trade fair will demonstrate that wires and cables are among the cornerstones of the energy transition thanks to high-performance conductor technologies and sustainable materials. This is also highlighted by the new special area in Hall 13: 'At the **World of Cables**, we are now bringing the real stars of the industry to the big stage – the end products! Because without wires and cables, nothing works, neither high-tech nor sustainability,' explains Daniel Ryfisch.

Comprehensive supporting and forum programmes

At both leading trade fairs, the programme will be complemented by the High Potential Day on Thursday and **daily forums, expert presentations and live demonstrations**. Perfect for promoting dialogue between manufacturers, users and researchers. In addition, digital **'ecoMetals Trails'** will guide attendees to the pioneers of sustainability. The focus here is on the topics of **'Green Production Solutions 2.0', 'Energy & Carbon Management Solutions'** and **'Circular Solutions'** in terms of resource efficiency through recycling, recovery and reparability.

More information and tickets:
wire-tradefair.com
tube-tradefair.com

reduce waste & improve efficiency.

- Achieve global certifications (ISO, environmental standards) to meet regulated markets.

2. Sector Focus

- Target the EV market with lightweight non-ferrous castings.

- Expand into electronics, aerospace, defence, and medical equipment areas seeking alternatives to China.

3. Partnerships

- Form JVs with Korean, Japanese, Taiwanese, and European firms to access technology and new markets.

- Diversify export destinations across the US, Europe, and Middle East.

4. Government Initiatives

- Leverage schemes like PLI and Bonded Manufacturing for cost advantages.

- Use India's improving logistics under PM Gati Shakti for timely deliveries.

5. Sustainability

- Adopt greener processes to appeal to environmentally conscious global buyers.

- Strengthen supply chain traceability to meet evolving ESG requirements.

These steps will help Indian foundries build long-term customer confidence and capture a greater share of global casting demand.

New opportunities are emerging in coatings, 3D printing, ceramic sand, sleeves, and advanced binders. Which innovations will offer the most impactful improvements for Indian foundries?

"Innovation in binders, coatings, and sleeves will be the biggest quality multiplier for Indian foundries."

Advanced coatings, binders, and sleeves will deliver the most immediate improvements in casting quality. High-performance water-based coatings and zircon-based coatings are increasingly used for better finishes and reduced defects. Equipment like Compact Coating Units (CCU) ensures consistency and faster processing.

3D printing offers rapid prototyping with shorter lead times, lower tooling costs, and the ability to produce complex geometries. For foundries competing globally, this speed is a game-changer.

Ceramic sand is another impactful innovation due to its low thermal expansion and high reclamation rate, which significantly reduces defects like veining and scabbing. It also requires less binder and improves sustainability.

Sleeve technologies including HD sleeves, Tele sleeves, spherical sleeves, and neck-down slurry sleeves are helping foundries achieve better directional solidification, improved yields, and reduced fettling time.

Advanced binders (such as alkaline no-bake systems) are essential for minimizing gas-related defects, improving collapsibility, and meeting the quality standards demanded by global OEMs.

Looking at the segment-wise CAGR projections—automotive, machine tools, agriculture, pumps & valves, wind energy, and non-ferrous—where do you see the strongest growth potential for your organization, and how are you preparing to capture these opportunities?

"Wind energy, non-ferrous castings, and agriculture machinery will be the next high-growth frontiers."

Several sectors are set for strong growth between 2025 and 2028. Automotive will expand at around 7.9% CAGR supported by EV adoption, while agriculture machinery is expected to grow above 10% due to mechanisation and government support. Non-ferrous metals will see nearly 9%

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annual demand growth, driven by infrastructure and automotive. Machine tools will grow steadily with the rise of precision engineering. Wind energy has a highly positive outlook under India's renewable targets, and pumps & valves will benefit from growth in agriculture, construction, and water projects.

How Gargi HA is preparing:

1. Advanced Coatings

We are scaling products such as:

- Granular Coatings (Arkopal GR 7850/60) for dust-free, consistent coating preparation.

- Water-based coatings (Arkopal B5 IND) for high thermal stability.

- Zircon-based solvent coatings (Zirkofluid 3139 IND) for superior surface quality and reduced penetration.

2. Compact Coating Unit (CCU)

Our CCU enables automated, consistent coating preparation with reduced manpower and defects. It is now manufactured in India, supported by a customer experience centre for demonstrations. Granular coatings used with the CCU are seeing strong demand.

3. Sleeves & Feeding Systems

Solutions like Exoplast pads, Contour Breaker cores, spherical HD feeders, and neck-down slurry sleeves help improve yield, reduce fettling, and serve both ferrous and non-ferrous foundries.

4. 3D Printing

We supply advanced binders for 3D printing, enabling rapid prototyping, reduced tooling time, and complex geometries for sectors like EVs and aerospace.

5. Ceramic Sand

Garsand ceramic sand supports high-quality complex castings with low thermal expansion, high reclamation rates, and reduced defects often replacing zircon.

6. Advanced Binder Systems

Innovations like Biocure (plant-based cold-box), Silcure (low-emission inorganic binder), and Advanced Alphaset for olivine blends help reduce emissions and improve casting quality.

Gargi HA's strategy is to combine innovative products with strong technical support, supported by global sustainability commitments. Our project team works closely with customers to ensure first-time-right solutions, allowing us to target high-growth sectors with confidence.

HERE IS THE PROJECTED GROWTH TRENDS FOR EACH SECTOR:

Sector	Projected Growth Rate (CAGR) / Outlook (2025-2028/2030)	Key Growth Drivers
Automotive	7.9% CAGR (2024-2029)	Rising middle-class incomes, growing youth population, government PLI schemes, and a rapid shift towards Electric Vehicles (Evs).
Agriculture	10.08% CAGR (2025-2033) (varies by source)	Strong government support (e.g., increased credit access, PM-KUSUM scheme), increased mechanization and Agri-tech adoption, and growing demand for high-value horticulture products.
Non-ferrous Metals	~9% demand growth per annum	Government thrust on infrastructure development, robust demand from energy, construction, and automotive sectors, and improved producer profitability.
Machine Tools	~5.4% CAGR (CNC segment, 2024-2029)	Rapid industrialization, expansion of the manufacturing sector, adoption of automation and Industry 4.0 technologies, and demand for precision engineering.
Wind Energy	Strong growth in installed capacity; outlook positive	Significant government push for renewable energy targets, supportive policies, and the expansion of domestic manufacturing capabilities.
Pumps & Valves	Outlook is positive (implied)	Growth is strongly linked to the expansion of core user sectors like agriculture, infrastructure, construction, and manufacturing.

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Metal Recycling Market Poised for Strong Growth Amid Rising Urbanisation and Environmental Priorities

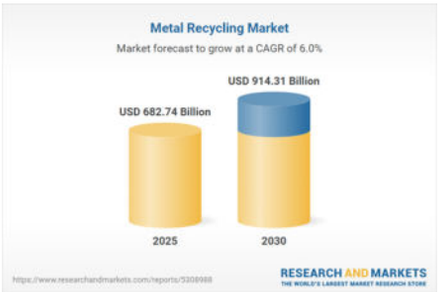
THE METAL recycling market is expanding due to urbanization, industrialization, environmental needs, and rising demand in sectors like construction and automotive, particularly in the Asia-Pacific region. Benefits include CO2 reduction and efficient resource use, though challenges exist with high costs and skills shortages.

According to Research And Markets reports the Metal Recycling Market will climb from USD 682.740 billion in 2025 to USD 914.307 billion by 2030, with a 6.02% compound annual growth rate (CAGR).

The metal recycling market is experiencing rapid growth, driven by increasing industrialization, urbanization, and environmental concerns. With 55% of the global population currently living in urban areas, projected to rise to 68% by 2050 according to the United Nations, the demand for recycled metals is surging, particularly in developing countries.

Metal recycling is critical for conserving natural resources and reducing greenhouse gas emissions, as producing one ton of steel emits approximately two tons of CO2. Recycling mitigates environmental damage from mining, which pollutes air, water, and soil, while also supporting economic growth by redirecting savings from mining to other projects. The market benefits from the energy efficiency of recycled metals, saving 92% for aluminum, 90% for copper, and 56% for steel compared to primary production.

Market Drivers Environmental protection and resource conservation are primary drivers, as recycling reduces CO2 emissions by approximately 500 million tons annually, according to the Institute of Scrap Recycling Industries. The metal recycling industry also generates significant employment, creating jobs at a rate 36



times higher than other sectors, per the National Institute of Health.

Rising demand in the construction, electronics, automotive, and household appliance sectors, particularly in Asia-Pacific and the Middle East, fuels market growth. Government regulations promoting sustainability & increasing prices of ferrous metals further bolster the industry. These factors collectively enhance the appeal of recycled metals as a cost-effective and environmentally friendly alternative to virgin materials.

Market Restraints

The metal recycling process faces challenges due to inefficiencies in recycling techniques & high operational costs. Advanced machinery and logistics required for recycling increase expenses, while the need for skilled labor to operate sophisticated equipment adds to costs and is hindered by a shortage of qualified workers. These factors pose significant barriers to scaling operations and maintaining competitiveness in the market.

Geographical Outlook

The Asia-Pacific region dominates the global metal recycling market, driven by robust demand in the construction industry, a key consumer of recycled metals. Rapid industrialization and development in countries like China, India, and others ensure the region's continued leadership. North America follows as a significant market, with advanced technology & growing environmental awareness driving demand. Government policies and public-private initiatives in the region further promote the use of recycled metals, supported by increasing recognition of their environmental and economic benefits

Key Players

Major players in the metal recycling market include Aurubis AG, Commercial Metals Company, Norton Aluminium Ltd., DOWA HOLDINGS Co., REAL ALLOY, Kuusakoski Recycling, ArcelorMittal S.A., Sims Metal Management, Tom Martin & Co. Ltd., Nucor Corporation, European Metal Recycling, and Novelis Inc. These companies employ strategies such as joint ventures and acquisitions to expand their market presence and capitalize on growing demand, leveraging government incentives to enhance competitiveness.

Key Benefits of this Report:

- Insightful Analysis: Gain detailed market insights covering major as well as emerging geographical regions, focusing on customer segments, government policies and socio-economic factors, consumer preferences, industry verticals, and other sub-segments.

- Competitive Landscape: Understand the strategic maneuvers employed by key players globally to understand possible market penetration with the correct strategy.

- Market Drivers & Future Trends: Explore the dynamic factors and pivotal market trends and how they will shape future market developments.

- Actionable Recommendations: Utilize the insights to exercise strategic decisions to uncover new business streams and revenues in a dynamic environment.

· Caters to a Wide Audience: Beneficial and cost-effective for startups, research institutions, consultants, SMEs, and large enterprises.

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IMRC 2026: Shaping the Future of Recycling and Circular Economy

THE MATERIAL Recycling Association of India (MRAI) is pleased to announce the International Material Recycling Conference & Exposition (IMRC 2026), scheduled for January 20–22, 2026, at the Novotel Jaipur & Convention Centre, Jaipur, India. This flagship event will focus on advancing a sustainable and circular economy for the recycling industry.

This event is supported by several key government ministries and institutions, including the Ministry of Steel, Ministry of Mines, Ministry of Environment, Forest & Climate Change (MoEFCC), Ministry of Electronics and Information Technology (MeitY), Ministry of Road Transport & Highways, Ministry of Commerce & Industry, Ministry of Micro, Small and Medium Enterprises (MSME), NITI Aayog, Central Pollution Control Board (CPCB), Directorate General of Foreign Trade (DGFT), Dept of Chemicals & Petrochemicals (DCPC) and the Bureau of Indian Standards (BIS).

Objective

IMRC 2026 conference aims to convene a truly global recycling event, bringing together 3,000 delegates from 40 of which 900 plus delegates already registered from over 40 countries for meaningful dialogue, networking, and collaboration. IMRC 2026 exposition will feature 230 stalls showcasing advanced technologies, recycling solutions, innovative products, and supply-chain support services.

The event will serve as a platform to exchange knowledge, explore technological and policy advancements, and collectively shape the future of the recycling ecosystem with a strong focus on sustainability, minimising carbon emissions, waste-to-wealth strategies, decarbonisation, and circularity.

"IMRC 2026 reflects the rising strength and scalability of India's recycling ecosystem. As the nation moves toward its Net Zero commitments, the recycling industry has a crucial role in driving decarbonisation by reducing material footprints and enabling resource efficiency. Our focus remains firm - advancing responsible recycling through policy dialogue, recycling-linked incentives, viability gap support, and technological innovation that strengthens environmental compliance. IMRC 2026 brings together global leaders, regulators, and innovators to accelerate a future that is economically progressive, environmentally accountable, and aligned with India's long-term climate goals." Sanjay Mehta, President, MRAI

Event Highlights

IMRC 2026 will serve as a premier platform for networking and showcasing innovative products and technologies. The event will feature multiple brainstorming sessions across key recycling sectors, including Metals, Plastics, E-waste, Batteries, Tyres & Rubber, End-of-Life Vehicles (ELVs), Textiles, Construction & Demolition (C&D) Waste, Used Oil, Pyrolysis, and Solar Waste.

Sustainability & Climate Action

With India experiencing rapid urbanisation, industrialisation, and rising material consumption, IMRC 2026 will highlight the recycling industry's vital role in driving climate action by enabling measurable carbon reductions, conserving natural resources, maximising resource efficiency, combating climate change, and supporting India's transition towards low-carbon growth.

The conference will address the sector's critical challenges and the need for stronger policy support, targeted regulatory amendments, improved material quality standards/ grades, incentives, and innovations to accelerate sustainable growth.

Key areas of focus include:

Circularity Through Design Decarbonisation & Green Materials Sustainability & Resource Efficiency Minimum Recycled Content Recycling-Linked Incentives (RLI) Policy Frameworks Innovation & Technology Global Collaborations Waste-to-Wealth & Resource Recovery.

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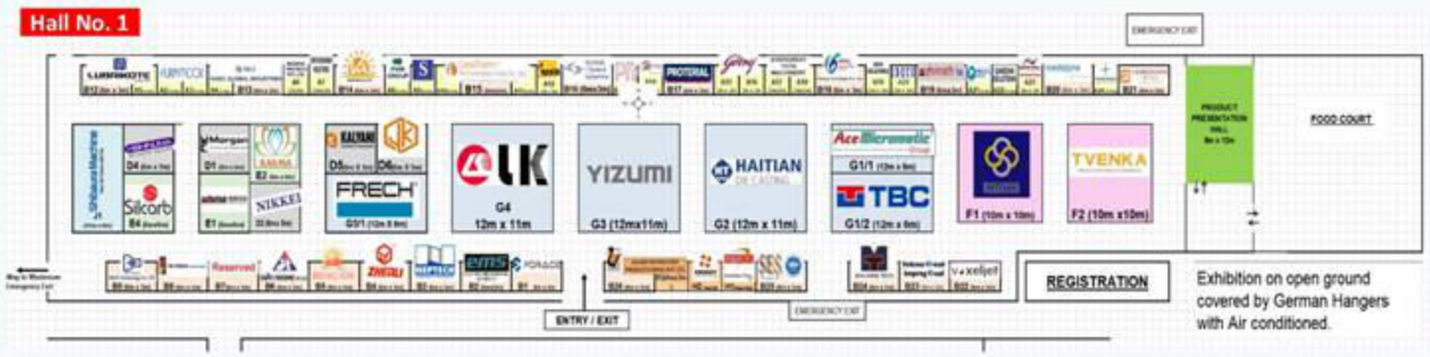

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Vedanta Aluminium Broadens Low-Carbon Portfolio with Restora Production at BALCO

VEDANTA ALUMINIUM, India's largest producer of aluminium, has expanded its low-carbon product portfolio with the launch of Restora at its Bharat Aluminium Company Limited (BALCO) plant in Korba, Chhattisgarh. BALCO is a subsidiary of Vedanta Limited and a business unit within Vedanta Aluminium. This marks a significant milestone in the company's journey towards achieving Net Zero Carbon by 2050 and reinforces Vedanta's commitment to sustainable manufacturing.

Restora is manufactured using renewable energy and has a verified greenhouse gas (GHG) emission intensity well below 4 tonnes of CO_2 equivalent per tonne of aluminium, meeting the global threshold for low-carbon aluminium. This positions Vedanta Aluminium as a key enabler of decarbonised global supply chains and highlights BALCO's alignment with the group's broader sustainability goals.

Vedanta Aluminium's Jharsuguda smelter has been producing Restora since early 2022. The unit also manufactures Restora Ultra (ultra-low carbon product, made from recovered aluminium).

Currently, BALCO offers Restora ingots, with plans to expand the product portfolio in line with evolving industry requirements. This development strengthens Vedanta Aluminium's low-carbon footprint across its operations, catering to the rapidly growing demand for sustainable materials in India and globally.

Emphasizing on the role of greener operations, Rajiv Kumar, CEO, Vedanta Aluminium, said, "Restora has already set a benchmark in low-carbon aluminium production. With its introduction at BALCO, we are expanding our portfolio to sustainable aluminium across our operations. This is a strategic step in strengthening India's position as a global hub for climate-conscious industrial growth."

Speaking about the product line, Rajesh Kumar, CEO and Director, BALCO, said, "Designed for industries like automotive, construction, electricals, packaging, and renewable energy, Restora enables our customers to build greener value chains and accelerate their transition to responsible manufacturing. While we have introduced Restora ingots, we have the capability to offer value-added products under the Restora brand to meet the evolving demands of our customers."

The expansion of Restora production to BALCO is part of Vedanta Aluminium's strategy to reduce carbon emissions across every stage of its value chain. Through sustained efforts in operational efficiency and clean energy adoption, the company has achieved 8.96% reduction in GHG intensity since FY21. Aluminium, often called the metal of the future, is pivotal to enabling clean energy technologies and climate-resilient infrastructure.

Recognising this, Vedanta Aluminium brings together technical, operational, and marketing expertise in a Centre of Excellence to develop innovative products and applications for sunrise sectors such as electric mobility, renewable energy, infrastructure, aerospace, and more. With Restora, the company continues to deliver aluminium that not only meets the demands of a climate-conscious world but also drives India's leadership in sustainable industrial transformation.

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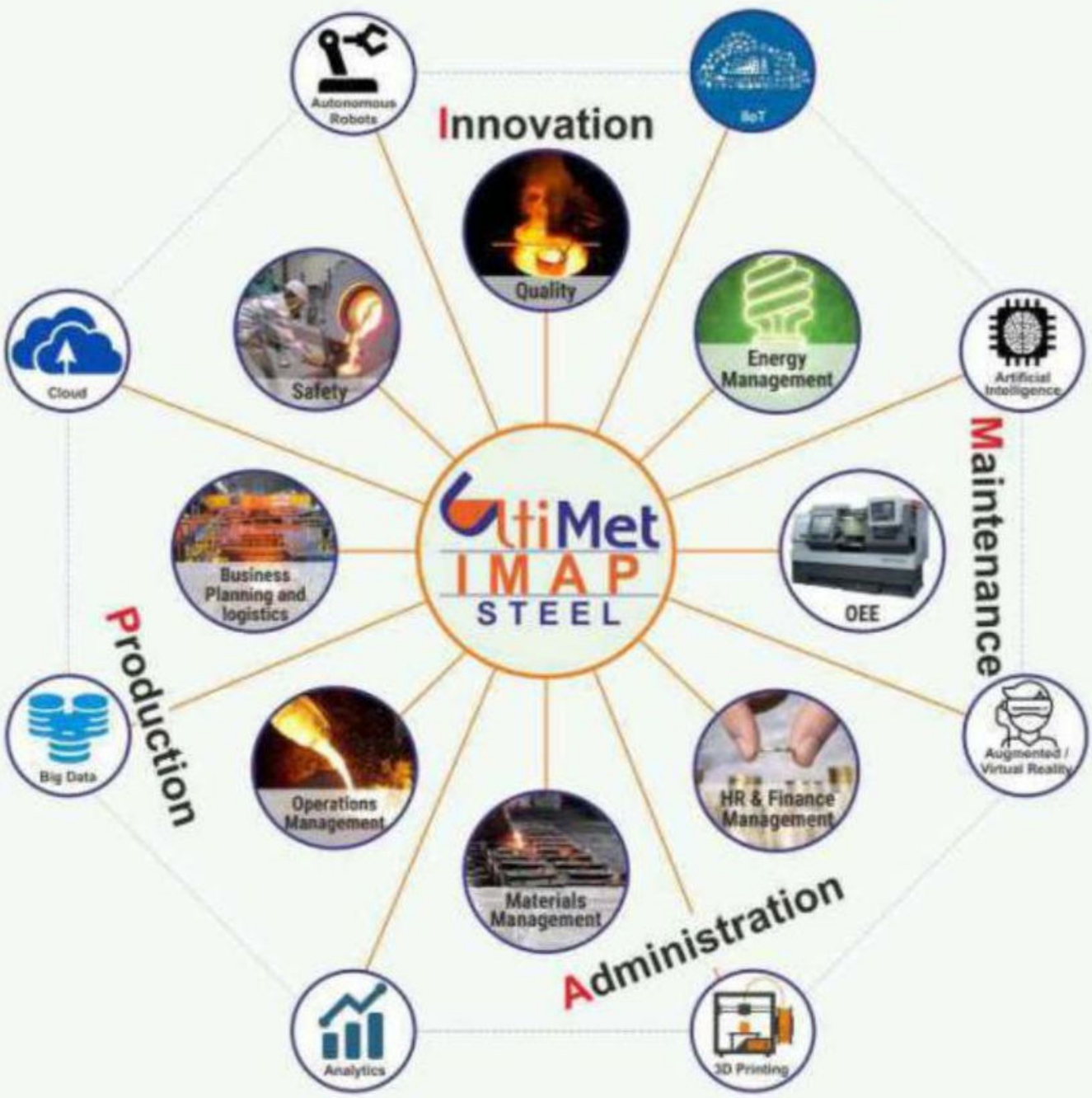

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Hindustan Zinc Tops S&P Global Sustainability Rankings for 3rd Year

HINDUSTAN ZINC Limited India's only and the world's largest integrated zinc producer, and among the top five global silver producers, has has delivered a sustainability hat-trick by retaining its No. 1 position worldwide as on 5 November 2025 in the Metals & Mining sector in the S&P Global Corporate Sustainability Assessment (CSA) 2025 for the third consecutive year, with an industry-leading score of 90 amongst 235 companies worldwide. This makes Hindustan Zinc to have achieved a 90/100 CSA score, highest in the past five years.

The S&P Global Corporate Sustainability Assessment (CSA) is one of the world's foremost benchmarks for assessing Environmental, Social, and Governance (ESG) performance. It evaluates companies based on ESG criteria, offering a comprehensive view of their sustainability practices. These rankings serve as a critical tool for companies to assess their ESG performance, identify areas for strengthening, and align with global sustainability standards. Last year, Hindustan Zinc held the first rank globally among metals & mining industry as per the 2024 assessment with a score of 86. This year, Hindustan Zinc achieved the highest scores in key parameters such as Climate Strategy, community relations, waste & pollutants.

The recognition reinforces the company's position as the world's most sustainable metals and mining organization, trusted by global investors, partners, and stakeholders alike. The company's continued leadership reflects its integrated sustainability approach across environmental stewardship, renewable energy transition, water conservation, waste management, safety, and social performance.

Through initiatives like EcoZen - Asia's first low-carbon zinc and ongoing decarbonization measures, Hindustan Zinc continues to set benchmarks in industrial innovation and climate responsibility. The company is also 3.32 times Water-Positive organization and recently became the first Indian company to join the International Council on Mining & Metals (ICMM). These achievements underline their unwavering focus on operational excellence, sustainable growth, and long-term value creation across the value chain.

Reflecting on this achievement, Hindustan Zinc's Chairperson - Priya Agarwal Hebbar said, "Being recognized as the world's most sustainable company in the Metals & Mining sector for the third consecutive year is a proud and humbling moment for all of us at Hindustan Zinc. This recognition reflects our deep-rooted commitment to ESG excellence and our relentless pursuit of responsible and inclusive growth. It is the compass that directs our growth - shaping every innovation, every partnership and every step toward a more sustainable tomorrow."

Hindustan Zinc's consistent global leadership in sustainability reflects how Indian enterprises are shaping the future of responsible industry. The company continues to champion global best practices, promote transparency in ESG reporting, and work toward its Net Zero by 2050 goal. With sustainability deeply embedded in its business philosophy, Hindustan Zinc stands as a symbol of India's capability to deliver world-class performance with global accountability.

The company has integrated circular economy principles across its operations, achieving more than 30% of total water usage through recycled, low-quality treated-sewage water at key operational sites, striving to achieve zero waste to landfill status, and ensuring sustainable development for all. With a 530 MW Power Delivery Agreement, Hindustan Zinc plans to source 70% of its electricity from renewable sources by FY 2028, significantly reducing its carbon footprint. The company is also driving decarbonisation through the adoption of electric vehicles, low-emission fuel vehicles, and digital efficiency systems under its smart mining initiative.

Beyond environmental goals, Hindustan Zinc's sustainability vision encompasses social stewardship, empowering rural communities through education, healthcare, livelihood, and women's empowerment programs benefitting over 2.3 million lives in FY2025. The company's biodiversity conservation projects, including its efforts to preserve native flora and fauna around its operations, reinforce its commitment to harmony with nature. By aligning with the UN Sustainable Development Goals and embedding responsible practices across the value chain, Hindustan Zinc continues to set benchmarks for a corrosion-free, resource-resilient, and inclusive future.

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FIMI Seeks 15% Customs Duty Hike to Curb Low-Quality Aluminium Scrap Imports

THE FEDERATION of Indian Mineral Industries (FIMI), the apex body for India's mining sector, has submitted key recommendations to the Ministry of Finance ahead of the Union Budget 2026–27, calling for urgent policy intervention to safeguard the domestic aluminium industry. FIMI has recommended increasing the basic customs duty on primary aluminium and downstream products to 15%, to counter the sharp rise in aluminium imports & protect domestic manufacturing. India's aluminium manufacturing base is currently under threat by a surge in imports from aluminium surplus nations driven by global tariff and non-tariff protectionist measures on aluminium.

The federation highlighted ongoing and planned investments of more than ₹1.5 lakh crore in domestic aluminium capacity, with an additional ₹1.6 lakh crore in the pipeline to raise primary aluminium production to 7.2 MTPA by FY30 and around 9 MTPA by FY33, in line with the Aluminium Vision Document, released by the Ministry of Mines, earlier this year. These investments are expected to generate over 8 lakh direct and indirect jobs and contribute significantly to India's broader industrial growth trajectory. This will significantly enhance the Government's 'Viksit Bharat' vision by building resilient supply chains.

Aluminium imports have surged in recent years, especially from China, Russia, ASEAN nations and the Middle East. Despite sufficient domestic capacity, nearly 55% of India's aluminium demand in FY26 is projected to be met through imports. FIMI also expressed concern over the rising inflow of aluminium scrap. India has become the world's largest importer of aluminium scrap due to the absence of quality and BIS standards for recycling and scrap imports, resulting in diversion of low-quality scrap chains from regions such as the USA, EU, UAE and UK into the Indian market. FIMI calls for quality standards on aluminium scrap in line with India's Aluminium Vision Document which highlights existing global standards on scrap, and replication of the same in India.

To address cost pressures, FIMI has called for reducing customs duties on critical raw materials for aluminium production. Indian producers face high production costs due to expensive raw materials, an inverted duty structure, various taxes and cesses, electricity duty and high logistics costs. Although India has the natural advantage of being among the world's largest holders of bauxite and coal reserves, domestic aluminium production costs remain among the highest globally. Taxes and duties alone account for nearly 17% of production costs, hampering the sector's growth.

FIMI has urged the government to adopt these recommendations to unlock India's full potential in the minerals and metals sector. Implementing these measures will help revive mining activity, promote exports, create employment and attract fresh investments, supporting the national goals of Make in India and Atmanirbhar Bharat.

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Tata Steel Advances Circularity With India's Largest Steel Scrap Consolidation Network

TATA STEEL has taken a major step toward strengthening India's circular steel ecosystem by expanding its ferrous scrap collection and processing network to 25 locations across the country. This marks the largest private-sector scrap consolidation footprint in India, aligning with the growing push toward decarbonisation and resource efficiency in the domestic steel industry.

The company's scrap centres, operated under the brand Tata FerroHaat, now source material from urban aggregators, dismantlers, and industrial clusters, ensuring a steady supply of high-quality processed scrap for EAF operations. Industry analysts believe that an organised scrap ecosystem is critical for India, which is projected to require over 70 million tonnes of scrap annually by 2035, driven by the rise of EAF and hybrid steelmaking.

Tata Steel has emphasized that recycled scrap will play an increasingly central role in lowering India's steelmaking emissions. While the long-term shift toward hydrogen-based ironmaking is still evolving globally, scrap-based production remains the most proven near-term pathway for low-carbon steel.

The company is also integrating digital technologies—GPS-enabled tracking, QR-coded scrap bales, and automated weighing to increase transparency and traceability. This builds trust within the scrap supply chain, particularly when dealing with small recyclers and automotive dismantlers.

With India's vehicle scrappage ecosystem gaining momentum after the expansion of Registered Vehicle Scrapping Facilities (RVSFs), industry experts expect the availability of shredded scrap to increase significantly. Tata Steel's expanding footprint positions it to capture this rising flow of domestically generated scrap, reducing dependency on imports.

By strengthening circularity, Tata Steel aims to lower carbon intensity, stabilise raw material costs, and support India's transition toward more sustainable steelmaking.

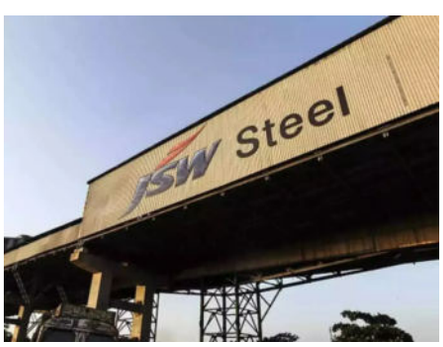
JSW Steel Commissions Scrap-to-Steel Pilot Line for Low-Carbon Long Products

JSW STEEL has commissioned a new scrap-to-steel pilot line at its Vijayanagar plant, supporting its ambition to significantly scale recycled steel production by 2030. The pilot facility, developed in collaboration with an international metallurgical technology provider, focuses on producing low-carbon long products for the construction and engineering sectors.

The initiative is a response to both global market trends and domestic policy shifts encouraging greener materials in infrastructure. JSW's new line uses processed scrap sourced from authorised dismantlers, construction waste recyclers, and imported shredded scrap. The facility is also equipped with energy-efficient induction furnaces to reduce emissions while ensuring consistent product quality.

The company aims to use this pilot to refine operating parameters, assess energy savings, and evaluate commercial viability before scaling up its recycled long products portfolio. According to JSW, the scrap-to-steel route can reduce carbon emissions by up to 70% compared to conventional blast furnace methods, provided high-grade scrap is available.

JSW is also evaluating opportunities to integrate renewable electricity into the pilot line, particularly during peak solar hours under Karnataka's revised Green Energy Policy. This could further improve the carbon profile of long products manufactured through this route. The move is seen as strategically important, as India's demand for long



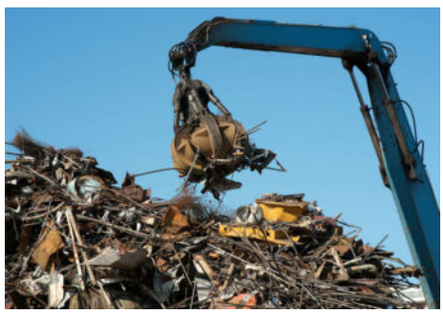
products is rising sharply, driven by metro rail, bridges, and industrial construction. With the government tightening procurement norms for green materials, JSW anticipates growing market preference for low-carbon long steel, especially among infrastructure developers, EPC contractors, and global consumers exploring India as a sourcing base.

The pilot is expected to run for six months before JSW finalises plans for commercial-scale replication across select units.

ArcelorMittal Nippon Steel Expands Recycling Capacity With New Scrap Processing Yard in Gujarat

ARCELORMITTAL NIPPON Steel India (AM/NS India) has commissioned a new automated scrap processing yard in Hazira, Gujarat, aimed at supporting its long-term decarbonisation roadmap and rising EAF-based capacity. The facility integrates shredding, shearing, baling, and sorting capabilities, enabling efficient processing of mixed industrial and post-consumer scrap.

The new yard will supply high-density scrap to AM/NS India's melt shop, improving furnace productivity and stabilising metallics procurement. India's steelmakers have long relied on imported scrap due to inconsistent domestic supply. AM/NS India's investment signals growing confidence in the emerging domestic



scrap ecosystem, particularly with policy reforms like extended producer responsibility (EPR) and the vehicle scrappage programme gaining traction.

The company has also partnered with logistics players to streamline the movement of scrap from collection centres to the Hazira yard. Digital tracking systems and material quality dashboards support real-time monitoring, ensuring consistency in scrap quality.

From a sustainability standpoint, this initiative supports AM/NS India's goal to reduce emissions intensity by 20% by 2030. Scrap charge optimisation is a critical part of this plan, enabling the company to transition toward hybrid steelmaking routes. Industry watchers believe that the Hazira yard is a precursor to a broader AM/NS strategy to build a network of regional scrap consolidation hubs across India. Rising demand for low-carbon steel from automakers, engineering firms, and global supply chains will likely accelerate investment into such facilities.

The yard is expected to process approximately 0.6 million tonnes of scrap annually once fully operational.

Vedanta Aluminium Launches India's First 'Closed-Loop Recycling Programme' With Auto OEMs

VEDANTA ALUMINIUM, India's largest aluminium producer, has launched a new closed-loop recycling programme in partnership with leading automotive OEMs. The initiative aims to recycle aluminium scrap generated during vehicle component manufacturing and reintroduce it into Vedanta's value chain to produce low-carbon primary and secondary aluminium.

Closed-loop recycling models are well established in Europe and Japan, but remain nascent in India. By implementing this system, Vedanta is helping auto OEMs reduce waste, improve material efficiency, and meet sustainability targets under global supplier codes.

The programme involves collecting segregated aluminium scrap from OEM stamping and machining facilities, transporting it to Vedanta's recycling centre, processing it into high-purity recycled aluminium, and supplying it back to the OEMs. This reduces both carbon emissions and dependency on imported aluminium scrap.

Vedanta plans to expand the closed-loop model to other industries such as electrical equipment, consumer appliances, and packaging. With India aiming to triple its aluminium demand by 2035, circularity will be essential for managing both sustainability and cost pressures.

The company's Jharsuguda facility has already integrated renewable energy sourcing and advanced sorting technology to support this programme. Early estimates suggest that the closed-loop system can reduce aluminium-related emissions by up to 95%, depending on scrap input quality.

Industry analysts view this move as a significant step in aligning India's aluminium value chain with global circularity benchmarks.

Hindalco Strengthens India's Copper Recycling Push With New Refining Line at Dahej

HINDALCO INDUSTRIES has operationalised a new refining line at its Dahej facility dedicated to processing copper scrap and secondary raw materials. The move comes as part of the company's strategy to expand its circular copper capabilities in response to rising demand for recycled copper in EVs, renewable energy infrastructure, and electrical equipment.

India's copper demand is projected to nearly double by 2030, driven by transformers, motors, solar inverters, and EV charging infrastructure. With global copper prices remaining volatile, recycled copper offers an economically attractive alternative while supporting sustainability goals.

The new line at Dahej is equipped with advanced refining and alloying technology that enables Hindalco to produce high-conductivity recycled copper suitable for motors, windings, and power transmission. The plant will also support the company's growing portfolio of low-carbon copper products under its sustainability brand.

Hindalco is also strengthening backward linkages through partnerships with e-waste recyclers and industrial scrap suppliers. The company aims to develop end-to-end traceability systems so customers can track the recycled content and carbon footprint of their copper products.

Experts believe the expansion positions Hindalco to play a larger role in India's transition toward a circular copper economy, especially as global buyers seek suppliers with strong recycling credentials.

Jindal Stainless Scales Up Stainless Steel Scrap Recovery to Support Low-Carbon Melt Shops

JINDAL STAINLESS has increased its stainless steel scrap recovery and sorting capacity with the commissioning of upgraded facilities at its Jajpur complex. The move supports the company's growing focus on sustainable stainless steel production and aligns with global customer requirements for traceable recycled inputs.

The new infrastructure—equipped with sensor-based sorting, magnetic separators, and material grading systems—will significantly improve the quality of scrap feedstock entering Jindal's melt shops. High-quality stainless scrap is critical for achieving consistent chemical composition and mechanical properties in specialty stainless grades.

According to the company, recycled inputs now account for nearly 60% of its total melt mix, and this percentage is expected to increase as India's scrap collection ecosystem expands. Jindal Stainless is actively partnering with organised recyclers and industrial units to formalise supply chains.

The company has also launched awareness programmes for downstream fabricators to encourage proper sorting and segregation of scrap at the source—an essential step for building a robust stainless scrap value chain. As stainless demand rises in architecture, kitchenware, mobility, and process industries, using high-recycled-content feedstock helps reduce both cost and carbon intensity.

Industry analysts note that the expansion strengthens Jindal Stainless's position as a leading supplier of greener stainless solutions to global customers in Europe and the Middle East.

India's Steel Scrap Generation Crosses 35 Million Tonnes as Recycling Ecosystem Expands

INDIA'S ANNUAL steel scrap generation has crossed an estimated 35 million tonnes, marking a significant milestone in the country's move toward circular steelmaking. The growth is driven by higher automotive scrappage volumes, expansion of industrial clusters, & rising dismantling activity under the Registered Vehicle Scrapping Facility (RVSF) scheme.

Industry experts note that India's scrap availability has risen steadily since the implementation of the vehicle scrappage policy, which became more effective in 2024–25 as state governments accelerated RVSF approvals. This has helped boost supply for induction furnace and EAF units, which have faced historical challenges due to inconsistent scrap flows.

Scrap demand is projected to rise sharply over the next decade as India adds EAF and hybrid steelmaking capacities to meet decarbonisation targets. The Ministry of Steel has already highlighted the need for 70–80 million tonnes of high-quality scrap annually by 2035, supported by an organised recycling chain.

State governments including Gujarat, Maharashtra, Tamil Nadu, and Haryana have rolled out incentives for scrap yards, dismantlers, and e-waste and auto recycling zones. Several private players are entering the sector with mechanised shredding & baling units.

However, industry bodies caution that India must improve segregation, standardisation, and certification practices to ensure consistent scrap quality. Strengthening reverse logistics and digital tracking frameworks will also be key. As India positions itself as a global hub for low-carbon steel, the availability of reliable, high-grade scrap will become a strategic competitive advantage.

Ministry of Steel Finalises Framework for 'Circular Steel Parks' to Support Scrap-Based Growth

THE MINISTRY of Steel has finalised the blueprint for establishing Circular Steel Parks (CSPs) across major steel-producing states, aimed at building India's first integrated ecosystem for large-scale ferrous scrap recovery, processing, and reuse. The initiative is aligned with India's low-carbon roadmap and the National Green Steel Mission.

Circular Steel Parks will house scrap collection yards, shredders, shearing units, dismantling facilities, and testing labs, all integrated with logistics hubs. States under consideration include Odisha, Chhattisgarh, Maharashtra, and Tamil Nadu, chosen for their proximity to major steel clusters and ports.

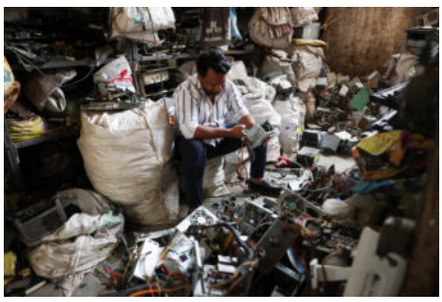
The CSP model is designed to address long-standing issues in India's scrap ecosystem—fragmented suppliers, inconsistent quality, and limited organised processing capacity. By co-locating recycling infrastructure with steel production hubs, the government aims to streamline metallics availability for EAFs and hybrid steel plants.

The parks will operate on a PPP framework, with central and state governments offering land, financial incentives, and approvals, while private companies manage operations and investments. The initiative is expected to attract equipment manufacturers, logistics firms, recyclers, and technology solution providers focused on sensor-based sorting, digital traceability, and AI-powered scrap grading.

Pilot parks are expected to begin construction in 2026, with the first commercial parks becoming operational by 2028. The parks will also support recycling of automotive, construction, and industrial scrap, thereby reducing dependence on imported shredded scrap.

The Ministry believes that CSPs will play a pivotal role in helping India achieve its circularity and emissions reduction goals, especially as global buyers push for higher-recycled-content steel by 2030.

India's Non-Ferrous Scrap Imports Rise 12% as Domestic E-Waste Processing Struggles to Keep Pace



INDIA'S NON-FERROUS scrap imports rose 12% year-on-year in the first half of FY 2025–26, reflecting ongoing challenges in domestic e-waste collection and processing. Despite growth in the recycling sector, industry capacity remains inadequate to meet rising demand from the electrical, automotive, & clean energy industries.

Aluminium scrap continues to be the largest import category, driven by auto components, packaging, and conductor manufacturers. Copper scrap imports have also increased significantly due to rising demand from EVs, solar infrastructure, motors, and renewable energy equipment.

Industry leaders highlight that the domestic e-waste ecosystem is improving, but formalisation remains slow. Only 25–30% of electronics waste is routed through authorised recyclers, limiting the flow of high-quality copper & aluminium scrap into the value chain.

India's new Extended Producer Responsibility (EPR) regulations are helping, with improved tracking, authorised dismantlers, and compliance mechanisms. However, small recyclers still lack access to modern shredding and sorting technology, resulting in lower material recovery rates.

To reduce import dependence, industry associations have called for:

- Higher incentives for formal recyclers,

- A unified digital traceability platform,

- Integration of informal collectors into the formal system, and

- A stronger nationwide network of e-waste collection centres.

With non-ferrous demand expected to grow at 8–10% annually, strengthening recycling capacity remains a priority. Without significant improvements, India risks continued reliance on imported scrap, affecting both cost competitiveness and sustainability outcomes.

Maharashtra Leads India in Ferrous Scrap Aggregation With New Urban Recycling Clusters

MAHARASHTRA HAS emerged as India's leading state for ferrous scrap aggregation with the launch of new urban recycling clusters in Mumbai, Pune, Nagpur, and Nashik. The clusters bring together dismantlers, aggregators, shredding units, and logistics hubs under a semi-formal structure aimed at improving scrap traceability and quality.

The clusters are part of a broader state initiative to align with national circular economy goals and reduce unorganised scrap flows. By enabling segregation, pre-processing, and certification of scrap before it reaches steel mills, the clusters aim to support EAF operators and hybrid steel plants in meeting low-carbon production requirements. Recycling industry experts note that Maharashtra's strong automotive, engineering, and industrial base creates a continuous flow of end-of-life metals, making it an ideal state for circularity-focused pilots.

Stainless Steel Fabrication Industry Drives Demand for Recycled Stainless Inputs

THE STAINLESS steel fabrication industry in India covering kitchenware, architecture, automotive, white goods, and process equipment is witnessing increased demand for recycled stainless steel as producers intensify sustainability commitments. Market data indicates that recycled content in stainless steel has risen steadily over the past two years, supported by improved scrap segregation and stainless recovery infrastructure.

Fabricators are increasingly preferring suppliers with certified recycled-content products, especially those exporting to Europe and the Middle East where ESG compliance has become mandatory. With stainless steel demand in India projected to grow at 7–8% annually, the availability of high-quality stainless scrap is becoming strategically important.

Industry players have also reported better availability of recovered stainless scrap due to improved industrial waste segregation, increased stainless offcut collection, and organised recyclers entering the supply chain.

However, challenges remain—especially in separating scrap by grade, ensuring consistent chemical composition, and avoiding contamination from mild steel or non-metallic impurities. To address this, manufacturers are investing in sensor-based sorting systems, handheld analysers, and AI-enabled scrap classification.

Global Steelmakers Accelerate Scrap-Based Expansion as EAF Capacity Surges Worldwide

GLOBAL STEELMAKERS are fast-tracking their transition to electric arc furnace (EAF) production as scrap availability improves and carbon regulations tighten. According to recent industry reports, the world is expected to add over 70 million tonnes of new EAF capacity by 2030, replacing older blast furnaces in Europe, the US, Japan, and parts of Asia.

The shift is driven by emissions regulations such as the EU's Carbon Border Adjustment Mechanism (CBAM), which penalises high-carbon steel imports, as well as strong customer demand for low-carbon materials. Major producers including ArcelorMittal, Nippon Steel, POSCO, and US Steel are investing heavily in scrap processing, hybrid furnaces, and secondary metallurgy.

The US remains the global leader in scrap-based production, with EAFs contributing nearly 75% of its total steel output, supported by a strong domestic scrap recycling system. Europe is rapidly following suit as governments implement decarbonisation incentives and energy subsidies for clean steelmaking.

Japan and Korea are focusing on upgrading EAFs for high-grade automotive steel, historically dominated by integrated mills. Meanwhile, Turkey and the Middle East continue to expand as competitive scrap-based steel hubs, benefiting from strong access to shredded scrap and renewable energy.

Analysts expect global scrap demand to increase sharply, with concerns emerging about availability and quality. The World Steel Association estimates that global metallics demand (scrap, DRI, HBI) could rise to 1.2 billion tonnes by 2035.

For developing nations, the shift represents both an opportunity and a challenge: access to affordable high-grade scrap will define future competitiveness in the global steel supply chain. As the circular steel economy accelerates, countries with strong recycling infrastructure will benefit the most.

EU Tightens Circular Economy Rules, Mandates Recycled Content Targets for Metals by 2030

THE EUROPEAN Union has introduced new circular economy regulations that mandate minimum recycled content requirements for key metals including steel, aluminium, and copper by 2030. The policy is part of the EU's broader Green Industrial Plan and aims to reduce reliance on imported virgin materials while improving resource efficiency across the bloc.

Under the new framework, steel products used in construction, automotive, and consumer goods must contain a minimum percentage of recycled steel, with exact thresholds varying by sector. Aluminium packaging and automotive components must meet similar mandatory recycled-input ratios. Copper used in electrical infrastructure and consumer

electronics will also fall under new recycling and traceability rules.

The regulation is expected to significantly accelerate investment in scrap collection, sorting, and sensor-based processing technologies across the EU. Large producers including ArcelorMittal Europe, Thyssenkrupp, Voestalpine, and Aperam have already announced upgrades to their scrap-handling infrastructure.

However, recycling associations have raised concerns about the availability of high-quality scrap, especially as post-consumer scrap volumes remain constrained. Industry analysts note that achieving the EU's targets will require better end-of-life product design, improved dismantling systems, and greater consumer participation. The policy will also impact exporters to the EU. Non-EU producers, including those in India, Japan, Korea, Turkey, and Southeast Asia, will have to certify recycled content to maintain market access. This is likely to reshape supply chains and increase the importance of circularity credentials. The new rules come as Europe intensifies efforts to meet its climate-neutrality goals by 2050 and reduce dependence on external suppliers for critical materials amid geopolitical uncertainties.

Copper Recycling Gains Momentum Globally as Green Energy Transition Accelerates

COPPER RECYCLING is experiencing strong global momentum as nations accelerate investments in renewable energy, EVs, and electrification infrastructure. With copper being critical to motors, transformers, wiring, chargers, and renewable power systems, recycling is now seen as essential to meeting long-term demand sustainably.

Global copper demand is projected to grow 40–50% by 2040, with supply shortfalls expected if the recycling sector does not scale rapidly. In response, major producers such as Aurubis, Boliden, Freeport-McMoRan, and JX Nippon have expanded their scrap-based refining and alloying capabilities.

Aurubis has commissioned new multi-metal recycling lines in Germany and Belgium, focused on e-waste, cable scrap, and industrial residues. In the US, Freeport-McMoRan is exploring hydrometallurgical technologies to increase recycled copper recovery from low-grade scrap.

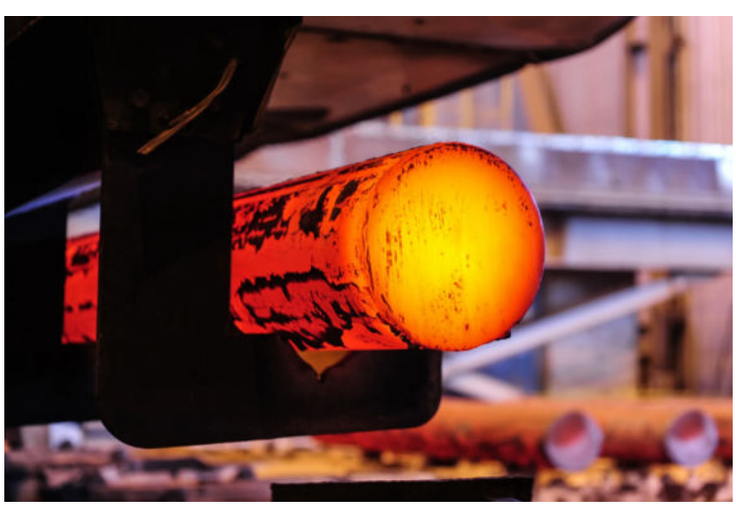
Recycling is becoming increasingly important not only for sustainability but also for supply security. Geopolitical disruptions, ore-grade decline, and mining project delays have made scrap a more reliable and flexible supply source.

EV manufacturers are also driving demand for recycled copper, as they seek to reduce the embedded carbon of motors and wiring harnesses. Solar and wind OEMs are introducing recycled-content requirements in procurement.

Industry analysts note that improving global collection systems particularly for e-waste will be crucial. Only 20–25% of global e-waste is processed through formal channels, representing a major untapped opportunity.

As global electrification accelerates, copper recycling is poised to play a central role in enabling supply resilience and reducing carbon footprints.

Middle East Emerges as a Competitive Hub for Scrap-Based Steelmaking With New EAF Projects



THE MIDDLE East is rapidly emerging as a competitive hub for scrap-based and low-carbon steelmaking, driven by access to renewable energy, strategic location, and strong investment appetite. Countries such as the UAE, Saudi Arabia, and Oman have announced several new EAF and hybrid steel projects scheduled for commissioning between 2026 and 2030.

The UAE continues to lead the region, with major producers scaling up EAF capacities and integrating solar-powered electrode systems. Riyadh-based steelmakers are exploring partnerships with global scrap processors to establish regional scrap hubs and secure supply for long-term operations.

Saudi Arabia's National Industrial Development and Logistics Program (NIDLP) includes incentives for recycling, circular economy projects, and low-emission steel. Oman is investing in modern scrap yards and downstream steel units to support its construction and infrastructure push.

The region's proximity to Europe and Africa makes it an attractive export base, especially as EU importers increasingly demand low-carbon steel. Several Middle Eastern producers are working toward ResponsibleSteel certification to align with global buyers' sustainability requirements.

With abundant renewable energy resources, the Middle East is also evaluating hydrogen-based steelmaking.

Oman and the UAE have initiated feasibility studies for hydrogen DRI projects that will eventually integrate recycled scrap for hybrid steelmaking.

As global supply chains shift toward greener steel, the Middle East's circularity-focused capacity is expected to play a growing role in international markets.

Foundries Strengthen Sand Reclamation Capabilities as Circularity Gains Importance

FOUNDRIES ACROSS India and the Middle East are significantly strengthening their sand reclamation capabilities as circular manufacturing becomes a priority across the metals value chain. Thermal and mechanical reclamation systems are now being deployed even by mid-sized foundries, reflecting both cost optimisation and environmental compliance needs.

Sand accounts for a major share of raw material consumption in ferrous and non-ferrous foundries. Effective reclamation helps reduce fresh sand purchases, landfill disposal, and waste handling costs. With new environmental rules tightening waste discharge norms in several Indian states, foundries are upgrading to more efficient, high-throughput reclamation units.

Advanced multi-stage reclamation systems combining attrition, magnetic separation, de-dusting, and thermal treatment are helping foundries achieve reclaimed sand quality comparable to new sand. This supports consistent mould and core performance while reducing binder consumption.

Some foundries have gone a step further, integrating AI-based systems to monitor sand quality in real time, enabling dynamic adjustment of moisture levels, binder content, and grain fineness.

Industry analysts note that high reclamation rates can directly improve profitability, especially for units using resin-coated or specialty sands. With rising adoption of ceramic sand in complex casting applications, reclamation capabilities are becoming even more crucial.

As sustainability- linked procurement becomes common among global buyers, foundries with strong circularity practices such as sand reclamation are gaining competitive advantage.

Breaking ground on new Indian manufacturing facility

THE LEADING provider of grinding and abrasive solutions, The Tyrolit Group has started construction of its first manufacturing facility in Pune, India, marking a significant expansion into the dynamic Indian and Asian markets. This milestone highlights the global company's commitment to local production, technological innovation, and sustainable growth, while supporting the 'Make in India' vision. Coordinated from Tyrolit's Austrian headquarters in Schwaz, this milestone marks a strategic expansion into one of the world's fastest growing manufacturing hubs while creating significant value across Austria and India.

Tyrolit's Pune facility embodies the group's global strategy by combining advanced European manufacturing with fast, local customer service. Tyrolit will now also be able to retip and finish the high tech grinding wheels locally in India – removing the need for costly, inefficient returns to Austria and enabling faster, more effective support for Indian customers and partners. This integrated approach optimises the supply chain by balancing state-of-the-art European production with responsive, localised support – generating a win-win scenario for both countries' economies.

Indian Foundries Adopt Automated Shot-Blasting to Improve Quality & Cut Rework

INDIAN FERROUS and non-ferrous foundries are increasingly investing in automated shot-blasting systems as part of broader quality improvement and workforce-modernisation initiatives. With global buyers demanding higher surface finish standards and shorter delivery cycles, foundries are replacing manual blasting with fully automated, PLC-controlled machines.

New-generation shot-blasting systems feature precision media-flow control, wheel-blast technology, wear-resistant components, and dust-collection units that maintain safe working conditions. These systems ensure consistent surface finish for castings, reducing rework, improving coating adhesion, and enabling better dimensional accuracy.

Automation also helps address workforce shortages, as shot blasting is a labour-intensive and physically demanding process. Several foundries report productivity gains of 20–30% after implementing automated systems.

Recycling plays a role as well: modern machines are designed to reuse blasting media efficiently, reducing consumption and waste. Segregation systems ensure that spent media and dust are collected separately for environmentally compliant disposal.

Sectors such as automotive, pumps, valves, and general engineering are leading this shift, especially those exporting to Europe and the Middle East. Industry suppliers note that enquiries for automated systems have doubled over the last 18 months.

Demand for High-Performance Binders Rises as Foundries Pursue Lower Emissions and Better Casting Quality

THE DEMAND for high-performance, lower-emission binder systems is rising across Indian and Southeast Asian foundries as manufacturers work to balance quality, sustainability, and cost pressures. With global customers emphasising ESG compliance and cleaner supply chains, foundries are transitioning from conventional binders toward more advanced alternatives.

Cold box binders with reduced BTEX emissions, inorganic binder systems, and plant-based formulations are gaining traction. These systems not only help meet environmental norms but also improve casting quality by reducing gas-related defects, improving collapsibility, and enhancing shakeout performance.

Indian foundries, particularly in automotive and general engineering segments, are adopting binders that offer better thermal stability and reduced fume generation. The shift is also influenced by tighter regulatory scrutiny in states such as Maharashtra, Karnataka, and Tamil Nadu, where environmental monitoring has become more stringent.

Advanced binder systems require careful control of sand quality, curing parameters, and mixing ratios. As a result, foundries are upgrading to more precise sand mixers, automated dosing systems, and online quality monitoring tools.

Industry experts believe that the adoption of high-performance binders will increase significantly over the next 2–3 years as global customers demand verifiable improvements in sustainability. The trend aligns with India's broader push toward cleaner production across its manufacturing sectors.

3D Printing Gains Strong Momentum in Foundry Tooling As Lead Times and Prototyping Cycles Shrink

3D PRINTING is gaining strong momentum in foundry tooling applications as manufacturers seek faster, more flexible, and cost-efficient solutions for prototyping and low-volume production. The technology is particularly valuable for complex moulds, cores, and patterns that are difficult to produce using conventional machining.

Indian and Middle Eastern foundries are increasingly adopting binder-jet 3D printing technologies to reduce tooling lead times from several weeks to just a few days. This allows customers to accelerate product development cycles, especially in sectors such as automotive, pumps, aerospace, and defence.

3D-printed sand cores offer superior precision, reduced assembly complexity, and the ability to integrate internal channels and intricate geometries. These benefits translate into improved casting consistency and reduced defect rates. Foundries are also reporting better design freedom and closer collaboration with OEMs during the development process. The cost of 3D printing systems remains a challenge, but service bureaus and technology partnerships are helping smaller foundries access the technology without large capital investments. Several Indian technology centres now offer 3D printing services for foundry applications, further accelerating adoption.

Indian Foundries Increase Use of Secondary Aluminium Alloys as Auto Sector Demands Greener Components

INDIAN FOUNDRIES are significantly increasing their use of secondary aluminium alloys as automotive OEMs push for higher recycled content in cast components. With India's aluminium die-casting market expanding rapidly, driven by EVs, two-wheelers, and lightweighting initiatives, foundries are shifting toward recycled inputs to meet both sustainability and cost targets.

Secondary aluminium usage has risen steadily in 2024–25, supported by improved scrap availability from dismantlers, stamping units, and industrial clusters. Several Tier-1 suppliers to automotive OEMs now mandate traceability for recycled content, prompting foundries to adopt better sorting, segregation, and melt control practices.

Cost competitiveness is another reason for this shift. Secondary alloys help stabilise input costs amid global volatility in primary aluminium prices. Advances in filtration, degassing, and melt treatment have also improved the quality of recycled alloys, making them suitable for critical components such as motor housings, brackets, and transmission covers. Foundries are investing in rotary furnaces, automated charging systems, and AI-based melt quality monitoring to optimise the use of recycled metal. Some are collaborating with scrap consolidators to secure steady supplies of clean, segregated scrap.

Q2 FY2025–26 Base Metals Performance Review

- A Metalworld Statistical Report

Q2 FY2025–26 (July, August, September 2025) was a period of mixed performance across global and regional base-metal markets. While LME prices reflected improving sentiment and tightening supply in certain metals, SMM (China) production numbers showed varying degrees of output discipline, particularly in zinc and nickel. Meanwhile, MCX futures in India tracked global cues but displayed a more conservative trend as Indian buyers balanced restocking needs with sluggish downstream demand in certain sectors.

Across the three months, base metals saw the interplay of several factors: firming renewable-energy demand, EV-sector resilience, better-than-expected Chinese industrial activity, and intermittent supply disruptions. This review compares the performance of base metals across LME, SMM and MCX over the July–September period to provide readers a holistic understanding of global and Indian market behaviour in Q2 Fy26.

1. LME Price Performance (July–August–September 2025)

LME prices during the quarter reflected a cautious upward trend in copper and aluminium, moderate volatility in zinc, stronger recovery in nickel, and relative flatness in lead. Global macro indicators improved marginally, with manufacturing PMI in key economies stabilizing and investor sentiment turning mildly positive.

Indicative LME Trend (Jul–Aug–Sep 2025):

(Values illustrative; based on prevailing expectations and current year-to-date trajectories)

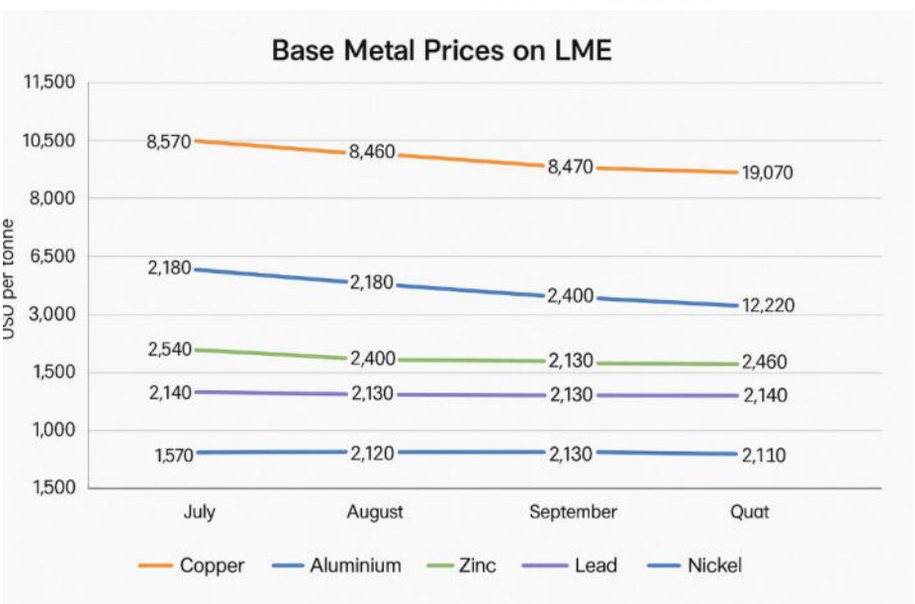
Narrative:

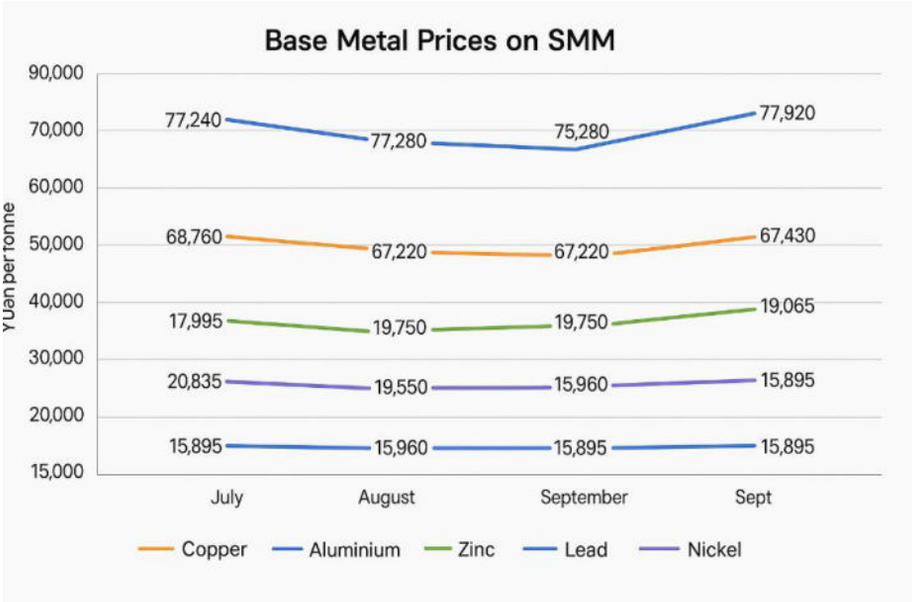
- Copper trended upward in July on account of stronger investment in grid expansion, particularly in the US and India. August saw some easing due to improved mine output, but September stabilised as demand from renewables and electric infrastructure remained firm.

- Aluminium prices held within a narrow band. Higher hydropower availability in China and easing energy costs supported smelter operations. Demand from packaging, automotive, and construction kept September marginally stronger.

- Zinc saw the weakest profile, with global smelters in maintenance and soft galvanizing demand in early Q2. Prices regained stability only toward September, supported by marginal output cuts.

- Nickel recorded the strongest momentum of all metals. Demand for EV battery precursors remained high, while supply concerns from Indonesia's ore restrictions boosted sentiment.





- Lead stayed flat throughout the period, reflecting stable but unspectacular battery-replacement demand.

2. SMM (China) Output Performance (July– August–September 2025)

China's July–September base-metal output revealed how smelters iterated production in response to market dynamics. Aluminium production remained relatively steady, supported by increased hydropower capacity in Yunnan. Zinc output remained under pressure due to ongoing maintenance, while nickel output rose gradually in line with China's stainless-steel and battery-materials demand.

Indicative SMM Output Trend (Jul–Aug–Sep 2025):

Narrative:

- Aluminium smelters in Yunnan returned to higher utilisation levels owing to stronger hydropower generation. This contributed to slight output gains in August, followed by stabilisation in September.

- Copper cathode production saw incremental improvement supported by improved treatment charges (Tcs), higher concentrate availability, and downstream demand from cable and grid-equipment manufacturers.

- Zinc output contracted in July and August due to maintenance activity at major smelters in Hunan and Guangxi. September showed a slight rebound as units resumed.

- Lead output grew marginally owing to stronger recycled feedstock flows. Secondary smelters saw improved profitability due to favourable scrap spreads.

- Nickel output rose consistently across the quarter, particularly in NPI and matte products. Downstream battery materials demand continued to incentivise production growth.

3. MCX Futures Performance (July–August–September 2025)

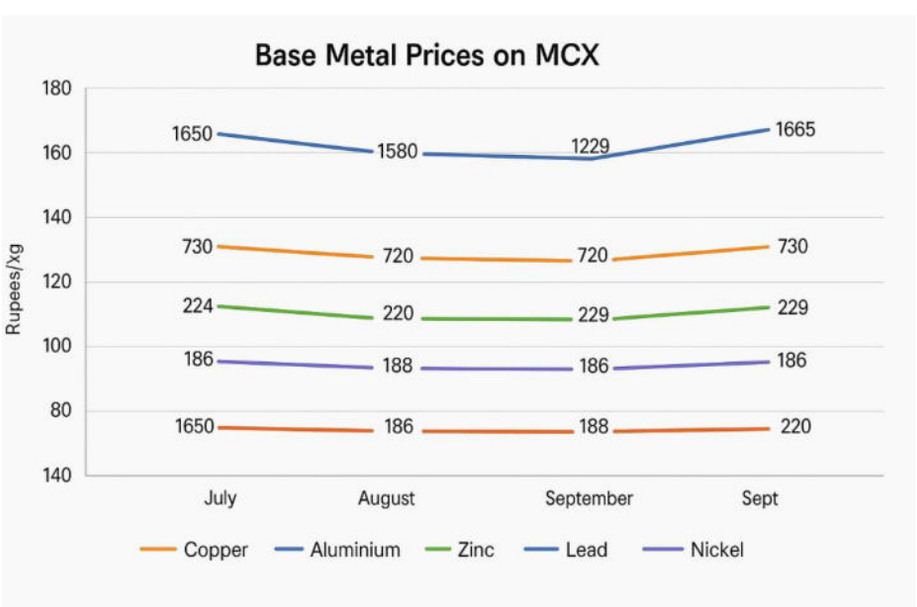
MCX base-metal futures followed global cues but reflected India's unique seasonal dynamics. Q2 typically sees steady industrial consumption but cautious procurement due to monsoon-related slowdowns.

Indicative MCX Monthly Movement (Jul–Aug–Sep 2025):

(Values indicative, pending exchange-published monthly summaries.)

Narrative:

- Copper futures strengthened in July as pre-festive consumption improved. August stabilised before September posted a modest uptrend.



Comparative Snapshot Table for Q2 FY2025-26 (LME vs SMM vs MCX)

Metal	LME Trend	SMM Output Trend	MCX Trend
Copper	↑ → ↑ *Firm; stable demand from grid & EVs*	→ → ↑ *Refinery utilisation improving*	↑ → ↑ *Festive demand & cable sector support*
Aluminium	↑ → ↑ *Stable with mild late-Q2 strength*	→ ↑ → *Hydropower-driven output stability*	→ ↑ → *Packaging & power-sector demand*
Zinc	↓ ↓ ↑ *Weakness from smelter issues; recovering*	↓ ↓ ↑ *Maintenance-driven contraction; rebound*	↓ ↓ ↑ *Tracks global softness, late stabilisation*
Nickel	↑ ↑ → *Strongest performer; EV demand led*	↑ ↑ ↑ *Consistent rise in NPI & matte output*	↑ ↑ → *Strong early Q2; stabilising at peak*
Lead	→ ↓ → *Flat; muted seasonal demand*	→ ↑ → *Recycled lead growth then stabilisation*	→ → ↓ *Soft battery market activity*

- Aluminium futures remained steady with small upward movement supported by power-sector cable demand and broader industrial stability.

- Zinc futures mirrored LME weakness; declines in July and August were followed by a September recovery as galvanizing sector inquiries improved.

- Lead futures remained stable with little movement, reflecting muted battery replacement trends in monsoon months.

- Nickel futures rose strongly across July and August, before stabilising in September following a peak in battery-precursor procurement.

5. Interpretation: What Q2 FY2025-26 Tells Us

The quarter reveals several insights:

1. Nickel is the outperformer:

Across LME, SMM, and MCX, nickel's trend was uniformly strong, driven by EV demand and supply tightness outside Indonesia.

2. Aluminium stayed remarkably stable:

Production in China normalised, and global prices held firm despite no major demand spikes. India's domestic futures followed the same calm trajectory.

3. Copper enters Q3 with balanced fundamentals:

Modest price fluctuations masked underlying structural demand from grid upgrade programmes worldwide.

4. Zinc struggled but is bottoming out:

Smelter maintenance and weak galvanizing earlier in the quarter kept zinc suppressed, but signs of recovery emerged in September.

5. India's futures markets tracked global cues reasonably well:

MCX remained aligned with LME movements, albeit in milder form, reflecting India's cautious but steady industrial appetite.

Conclusion

Q2 FY2025–26 reinforced the impression of a global base-metal market moving into a more stable, less volatile phase, even as structural demand sectors such as EVs, renewable energy, and infrastructure continued to lend underlying strength. While the quarter did not witness any dramatic price swings, the alignment of trends across LME, SMM, and MCX points toward a market that is increasingly being shaped by production discipline, cost rationalisation, and demand resilience in specific high-growth industries. The steady performance of aluminium and copper, the recovery signals in zinc, and the continued strength of nickel provide industries with a clearer sense of direction heading into the latter half of Fy26.

As always, external macroeconomic indicators interest rate movements, Chinese industrial recovery, and energy-cost dynamics will remain key variables to watch in the months ahead.

Data Transparency Note : All market trends, directional movements, and comparative insights presented in this report are based on the latest publicly accessible price assessments, industry indicators, and production trends available at the time of writing. These illustrations are designed to highlight relative month-on-month shifts across LME, SMM and MCX, and serve purely as analytical tools for understanding broader market tendencies during the July–September 2025 period.

Final exchange-reported monthly datasets may differ marginally depending on subsequent official publications and periodic revisions by the respective market platforms.

India's automobile sales up by 40% on festive demand, tax cuts

INDIA'S AUTO industry posted its strongest month on record in October, underscoring a sharp rebound in domestic consumption that could offset the impact of the slowdown in exports to the U.S.

Total retail sales across all vehicle segments from cars to tractors were up 40.5% from a year earlier, data from the Federation of Automobile Dealers Associations showed.

"Both passenger vehicles and two-wheelers achieved lifetime highs, signaling renewed consumer confidence and strong economic undercurrents," said C.S. Vigneshwar, President of the trade body, in the release.

India's automotive industry contributes 7.1% to the nation's gross domestic product and nearly half of manufacturing GDP, according to Government Data. The country is the fourth-largest automobile producer globally. Exports to the U.S. account for 2% of India's GDP.

Japanese carmaker Maruti Suzuki India and South Korea's Hyundai Motor India dominate the domestic car sales market, followed by local auto majors like Tata Motors and Mahindra & Mahindra.

Passenger vehicle sales grew 11% year on year to 557,000 units in October, while sales of scooters and motorcycles surged 52% to 3.15 million, driven by rural demand, goods and services tax reductions, and the festive rush.

Dealers reported "stronger footfalls and better sentiment leading to extremely high conversion," FADA noted.

Rural buyers steer recovery

Private and household spending now accounts for more than 60% of India's GDP in fiscal year 2025 a level comparable to developed economies such as the United States and the United Kingdom reducing the country's reliance on exports.

The rebound in domestic demand could help offset the negative impact of the steep U.S. tariffs on Indian goods imposed since August, analysts say.

In September, the Indian government announced widespread GST cuts to spur demand, including lowering taxes on small cars and two-wheelers to 18% from 28%.

According to FADA data, rural demand stood out: sales of passenger vehicles in smaller towns grew over three times faster than in urban centers, while two-wheeler sales nearly doubled urban growth.

Dealers of two-wheelers and cars, especially in rural India, expect strong demand to continue over the next three months, said the trade body of automobile dealers.

Any city with more than 40% of its male population working in agriculture is considered a rural area by FADA.

Commenting on October-2025 performance, Mr Rajesh Menon, Director General, SIAM said, "Passenger Vehicle, Two and Three-Wheeler segments posted their highest ever dispatches to dealers in October, primarily buoyed by the festive demand and the recent GST rate reduction, despite being constrained due to certain logistic limitations. In October 2025, Passenger Vehicles recorded sales of 4.61 Lakh units, posting a growth of 17.2% while 22.11 Lakh units of Two-Wheelers were sold, with a growth of 2.1% as compared to October of previous year. In the Three Wheelers segment, 81.29 thousand units were sold with a growth of 5.9%, compared to October 2024. With the reduced GST rates becoming effective from 22nd September 2025, October witnessed a strong uptick in Vehicle Registrations, resulting in a notable rise compared to Wholesales."

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

Report by *SIMA*
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CATEGORY SEGMENT / SUBSEGMENT MANUFACTURER	PRODUCTION				DOMESTIC SALES				EXPORTS			
	OCTOBER		APRIL-OCTOBER		OCTOBER		APRIL-OCTOBER		OCTOBER		APRIL-OCTOBER	
	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.	4,350	3,951	28,375	29,637	3.397	4,208	22,541	20,055	379	1,515	9,597	7,115
Hyundai Motor India Ltd.	23,800	29,515	1,91,580	1,91,193	17,666	16,088	1,13,380	98,117	12,033	13,831	81,640	97,802
Maruti Suzuki India Ltd.	89,174	97,321	6,26,713	6,42,823	77,294	85,210	5,09,643	4,97,011	16,681	16,210	87,191	1,16,666
Nissan Motor India Pvt. Ltd.	5,157	3.049	32,352	17.365	-	-	-	-	2,441	1,952	29,205	15,331
Renault India Pvt. Ltd.	1,185	1,162	8,499	7,129	706	554	4,919	3,150	-	787	3.293	3,862
Skoda Auto India Pvt. Ltd.	1,458	1,246	9,026	6,817	1,657	1,650	9,006	8,050	-	-	13	8
Tata Motors Ltd.*	NA	NA	68,094	71,131	NA	NA	64,969	66,719	NA	NA	953	2,512
Toyota Kirloskar Motor Pvt. Ltd.	153	245	1,004	1,789	4,449	6,438	31,021	32,723	-	-	-	-
Volkswagen India Pvt. Ltd.	2,820	2,784	35,742	34,192	2,351	2,453	12,139	12.662	-	-	24,733	20,280
Total A: Passenger Cars	**1,28,097**	**1,39,273**	**10,01,385**	**10,02,076**	**1,07,520**	**1,16,601**	**7,67,618**	**7,38,487**	**31,534**	**34,295**	**2,36,625**	**2,63,576**
B : Utility Vehicles												
FCA India Automobiles Pvt. Ltd.	707	477	3,981	3,274	424	290	2,401	1,654	208	230	1,412	1,870
Force Motors Ltd.	84	186	1,161	1,114	170	210	1,073	1,153	-	-	10	17
Honda Cars India Ltd.	2,701	2,349	33,246	17,937	2,149	2,186	12,607	11,470	4,155	2,609	26,712	10,252
Hyundai Motor India Ltd.	34,883	32,285	2,56,676	2,43,729	37,902	37,704	2,41,282	2,27,455	2,477	2,271	17,770	17,840
Isuzu Motors India Pvt. Ltd.	15	-	359	106	24	38	206	181	1	-	59	-
JSW MG Motor India Pvt. Ltd.	1,784	49	15,316	4,217	2,167	336	19,165	5,240	-	-	-	-
Kia India Pvt. Ltd.	23,602	30,900	1,61,716	1,79,791	22,753	29,556	1,50,074	1,60,562	2,042	2,808	16,870	16,474
Mahindra & Mahindra Ltd.	51,145	56,367	3,11,560	3,76,377	54,504	71,624	3,14,714	3,69,194	1,067	2.266	6,598	13,098
Maruti Suzuki India Ltd.	72,339	78,450	4,54,745	4,91,964	70,644	77,571	4,14,309	3,94,950	15,268	14,361	88,176	1,14,579
Nissan Motor India Pvt. Ltd.	5,169	7,712	26,452	43,281	3,119	2,402	16,206	11,350	8	5,320	6,303	29,546
Renault India Pvt. Ltd.	2.241	3,794	20,835	21,608	3,164	4,118	18,987	19,106	25	1,013	3,096	4,737
Skoda Auto India Pvt. Ltd.	1,823	4,487	9,508	33,075	2,422	6,602	11,282	36,419	116	50	777	849
Stelliantis India Pvt. Ltd.	717	1,411	4,456	4,107	717	1,426	4,296	4,339	806	304	3,065	4,075
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.	27,778	31,068	2,20,940	2.34,854	23,668	33,809	1.47.351	1,73,472	2,707	2,635	14,995	21,515
Volkswagen India Pvt. Ltd.	1,936	1,609	21,184	18,667	2,107	1,595	12,279	8,885	-	-	10,346	7,731
Total B : Utility Vehicles	**2,26,924**	**2,51,144**	**17,50,069**	**18,74,993**	**2,25,934**	**2,69,467**	**15,69,297**	**16,22,739**	**28,880**	**33,876**	**1,96,637**	**2,45,249**
C : Van												
Mahindra & Mahindra Ltd.	15	-	105	21	-	-	-	-	39	-	114	30
Maruti Suzuki India Ltd.	12,149	12,853	84,755	86,318	11,653	13,537	80,253	79,803	1,078	567	4,723	5,656
Tata Motors Ltd.*	NA	NA	7,103	9,933	NA	NA	9,082	9,660	NA	NA	111	111
Total C : Vans	**12,164**	**12,853**	**91,963**	**96,272**	**11,653**	**13,537**	**89,335**	**89,463**	**1,117**	**567**	**4,948**	**5,797**
Total Passenger Vehicles	**3,67,185**	**4,03,270**	**28,43,417**	**29,73,341**	**3,45,107**	**3,99,605**	**24,26,250**	**24,50,689**	**61,531**	**68,738**	**4,38,210**	**5,14,622**

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CATEGORY SEGMENT / SUBSEGMENT MANUFACTURER	PRODUCTION				DOMESTIC SALES				EXPORTS			
	OCTOBER		APRIL-OCTOBER		OCTOBER		APRIL-OCTOBER		OCTOBER		APRIL-OCTOBER	
	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	1,540	1,497	7,901	9,333	1,153	1,246	5,958	6,886	490	456	1,579	2,187
Bajaj Auto Ltd	60,933	68,621	3,71,873	4,19,386	42,047	42,113	2,63,291	2,62,346	16,421	27,368	1,03,408	1,61,163
Baxy Ltd	182	326	670	982	197	291	700	804	-	-	-	120
Force Motors Ltd	-	-	672	-	-	-	-	-	-	28	630	28
Mahindra & Mahindra Ltd	7,370	10,409	35,171	54,666	7,417	10,502	34,711	54,509	72	24	276	492
Piaggio Vehicles Pvt Ltd	8,845	7,657	52,896	46,252	8,125	6,436	44,639	35,814	1,087	1,384	7,401	10,320
Pinnacle Mobility Solutions P.L.	-	30	-	247	-	46	-	100	-	-	-	-
TI Clean Mobility Pvt Ltd	671	494	4,530	3,882	804	569	4,600	4,124	-	-	-	2
TVS Motor Company Ltd	10,495	18,258	79,175	1,18,882	2,788	6,111	15,095	32,806	8,038	12,244	64,108	83,703
Total A: Passenger Carrier	**90,036**	**1,07,292**	**5,52,888**	**6,53,630**	**62,531**	**67,314**	**3,68,994**	**3,97,389**	**26,108**	**41,504**	**1,77,402**	**2,58,015**
E-Rickshaw												
Atul Auto Ltd	562	327	3,871	2,293	573	332	3,738	2,343	-	-	-	-
Bajaj Auto Ltd	-	143	-	717	-	48	-	562	-	-	-	-
Baxy Ltd	416	230	1,743	1,096	403	185	1,850	1,260	-	-	-	22
Mahindra & Mahindra Ltd	1,202	856	8,833	3,710	1,109	952	7,443	4,014	17	-	34	-
TI Clean Mobility Pvt Ltd	-	-	-	1	-	-	-	-	-	-	-	1
Total E-Rickshaw	**2,180**	**1,556**	**14,447**	**7,817**	**2,085**	**1,517**	**13,031**	**8,179**	17	-	**34**	**23**
B: Goods Carrier												
Atul Auto Ltd	1,105	1,076	6,816	7,439	1,309	1,505	6,628	7,262	35	13	68	93
Bajaj Auto Ltd	5,408	5,152	34,745	35,866	5,871	5,517	32,554	34,447	608	256	1,528	2,145
Baxy Ltd	196	178	876	528	190	170	885	488	-	12	-	12
Mahindra & Mahindra Ltd	1,166	356	8,501	6,961	1,162	1,238	7,675	6,632	-	32	404	151
Piaggio Vehicles Pvt Ltd	2,682	3,604	18,376	18,574	2,977	3,340	18,083	18,077	30	6	386	441
TI Clean Mobility Pvt Ltd	-	117	-	328	-	84	-	277	-	-	-	-
TVS Motor Company Ltd	38	72	378	341	30	9	217	63	-	43	175	262
Total B: Goods Carrier	**10,595**	**10,555**	**69,692**	**70,037**	**11,539**	**11,863**	**66,042**	**67,246**	**673**	**362**	**2,561**	**3,104**
E-Cart												
Atul Auto Ltd	280	418	1,326	1,237	258	460	1,265	1,419	-	-	-	-
Baxy Ltd	208	64	633	318	219	64	626	320	-	-	-	-
Mahindra & Mahindra Ltd	118	-	438	1,153	138	70	611	1,185	-	-	-	-
Total E-Cart	**606**	**482**	**2,397**	**2,708**	**615**	**594**	**2,502**	**2,924**	-	-	-	-
Total Three Wheelers	**1,03,417**	**1,19,885**	**6,39,424**	**7.34,192**	**76,770**	**81,288**	**4,50,569**	**4,75,738**	**26,798**	**41,866**	**1,79,997**	**2,61,142**

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	OCTOBER		APRIL-OCTOBER		OCTOBER		APRIL-OCTOBER		OCTOBER		APRIL-OCTOBER	
	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	19,475	24,457	86,829	1,37,320	20,133	25,829	84,851	1,35,726	176	408	496	2,184
Bajaj Auto Ltd	29,294	35,113	1,59,276	1,57,392	30,644	34,900	1,58,585	1,55,776	-	120	2	330
Hero MotoCorp Ltd	48,550	61,372	2,46,077	3,15,756	41,801	61,722	2,24,556	3,02,963	1,483	3,332	16,477	18,050
Honda Motorcycle & Scooter I Pvt Ltd	2,96,374	2,86,945	20,38,378	20,09,334	2,99,985	3,62,891	18,83,745	18,02,060	27,903	27,725	2,00,193	2,06,702
India Yamaha Motor Pvt Ltd	38,000	35,297	2,34,101	2,08,950	32,606	30.988	1,94,068	1,82,699	5,688	4,544	39,412	36,921
Okinawa Autotech Pvt. Ltd	2,083	NA	3,529	112	2,080	NA	3,400	73	-	-	-	-
Piaggio Vehicles Pvt Ltd	3,352	4,397	27,968	25,984	3,113	3,568	19,213	18,251	864	1,497	9,370	8,241
Suzuki Motorcycle India Pvt Ltd	95,593	1,05,644	6,34,400	6,95,634	1,02,484	1,01,347	6,07,765	6,64,734	2,166	6,439	32,034	36,643
TVS Motor Company Ltd	1,86,086	1,85,591	10,70,727	13,12,600	1,88,354	2,02,758	10,42,317	12,83,430	5,085	3,161	59,914	60,759
Total A: Scooters	**7,18,807**	**7,38,816**	**45,01,285**	**48,63,082**	**7,21,200**	**8,24,003**	**42,18,500**	**45,45,712**	**43,365**	**47,226**	**3,57,898**	**3,69,830**
B: Motorcycles												
Bajaj Auto Ltd	3,94,626	3,77,561	22,19,446	23,03,301	2,25,265	2,31,570	13,16,622	12.36,614	1,58,463	1,75,726	9,23,288	10,67,374
Hero-MotoCorp. Ltd..	6,25,370	5,10,881	34,79,078	33,03,324	6,14,683	5,43,098	33,72,594	31,83,641	21,104	27,643	1,20,278	1,88,925
Honda Motorcycle & Scooter I Pvt Ltd	2,49,905	2,32,672	16,68.522	16,17,030	2,53,135	2,36,055	15,50,794	14,78,924	16,688	23,919	1,21,356	1,56,459
India Kawasaki Motors Pvt Ltd	481	292	2,056	1,312	356	608	2,368	2,810	-	-	-	-
India Yamaha Motor Pvt Ltd	63,213	53,724	3,78,268	3,66,397	42,743	37,396	2,49,846	2,07,099	21,290	27,404	1,24,279	1,66,174
Piaggio Vehicles Pvt Ltd	448	471	7,307	6,274	347	138	2,418	1,629	210	294	4,707	4,631
Royal-Enfield (Unit of Eicher Motors)	82,525	97,168	5,63,095	7,05,097	1,01,886	1,16,844	5,12,729	6,38,326	8,688	8,107	52,624	78,548
Suzuki Motorcycle India Pvt Ltd	14,703	16,824	1,01,364	1,16,436	2,456	2,107	13,705	9,192	12,949	19,358	86,426	1,06,856
Triumph Motorcycles I Pvt Ltd	30	13	260	90	70	35	724	411	-	-	-	-
TVS Motor Company Ltd	2,09,957	2,10,184	12,98,142	15,33,423	1,49,755	1,67,617	7,76,783	8,50,766	81,067	99,098	5,29,305	7,09,740
Total B: Motorcycles	**16,41,258**	**14,99,790**	**97,17,538**	**99,52,684**	**13,90,696**	**13,35,468**	**77,98,583**	**76,09,412**	**3,20,459**	**3,81,549**	**19,62,263**	**24,78,707**
C: Mopeds												
TVS Motor Company Ltd	51,974	38,966	3,12,539	2,88,347	52,380	51,256	3,12,173	2,92,242	1,518	1,260	4,326	13,908
Total C: Mopeds	51,974	38,966	3,12,539	2,88,347	52,380	51,256	3,12,173	2,92,242	1,518	1,260	4,326	13,908
Total Two Wheelers	**24,12,039**	**22,77,572**	**1,45,31,362**	**1,51,04,113**	**21,64,276**	**22,10,727**	**1,23,29,256**	**1,24,47,366**	**3,65,342**	**4,30,035**	**23,24,487**	**28,62,445**
Quadricycle												
Bajaj Auto Ltd	355	685	3,867	2,901	4	-	111	4	384	552	3,878	2,766
Total Quadricycle	355	685	3,867	2,901	4	-	111	4	384	552	3,878	2,766
Grand Total	**28,82,996**	**28,01,412**	**1,80,18,070**	**1,88,14,547**	**25,86,157**	**26,91,620**	**1,52,06,186**	**1,53,73,797**	**4,54,055**	**5,41,191**	**29,46,572**	**36,40,975**

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