

# ZINC & LEAD SCENARIO IN INDIA - AN UPDATE



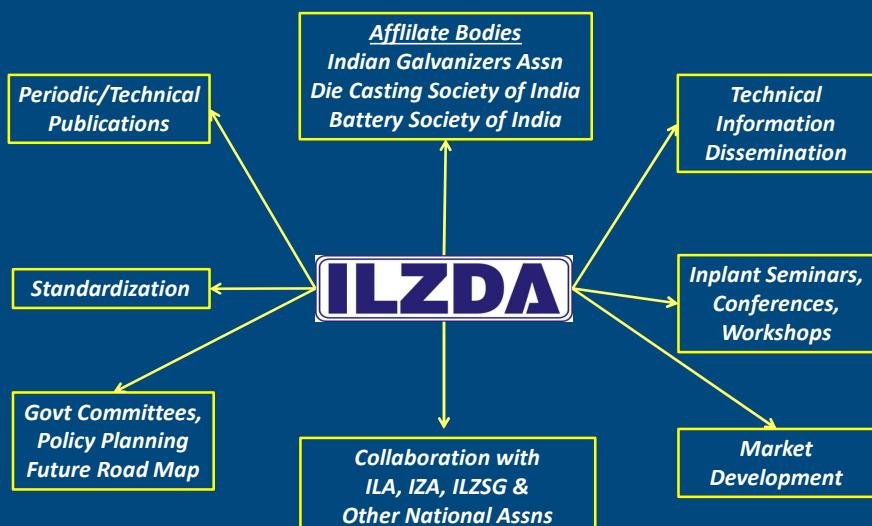
*ILZSG Meeting  
Lisbon  
9 Oct 2025*



*L Pugazhenthy, Executive Director  
India Lead Zinc Development Association &  
Past President, The Indian Institute of Metals*

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## INDIA LEAD ZINC DEVELOPMENT ASSOCIATION (64 years old)



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**GALVANIZING**

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July-Sept 2025

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THE BATTERY SOCIETY OF INDIA  
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**LEAD ZINC UPDATE**  
ilzda e-newsletter

August - September 2025  
Global Lead & Zinc Summits

World Refined Lead Supply & Usage 2020-2025

Year	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
Min. Produc.	4467	4584	4543	4601	4646	4662	4712	4773	4834	4895	4956
Max. Produc.	5200	5317	5276	5334	5373	5390	5441	5502	5563	5624	5685
Min. Usage	4298	4399	4358	4419	4479	4537	4597	4657	4717	4777	4837
Max. Usage	5120	5221	5180	5241	5291	5349	5409	5469	5529	5589	5649

OECD sees India growing at 4.7% in FY25

India: higher tariff rates will weigh on the export sector, but overall activity is anticipated to be the strongest in the region, with growth projected to be 4.7% in 2025 and 5.2% in 2026. The Party-based C2022 will be its Economic刺激计划.

SAF-related India's ISDP growth estimate at 4.5% on lead demand.

SAF-related India's ISDP growth forecast at 4.5% in the current fiscal, citing strong domestic demand amid a largely foreign investment.

India's ISDP growth forecast for FY26 to 4.8%.

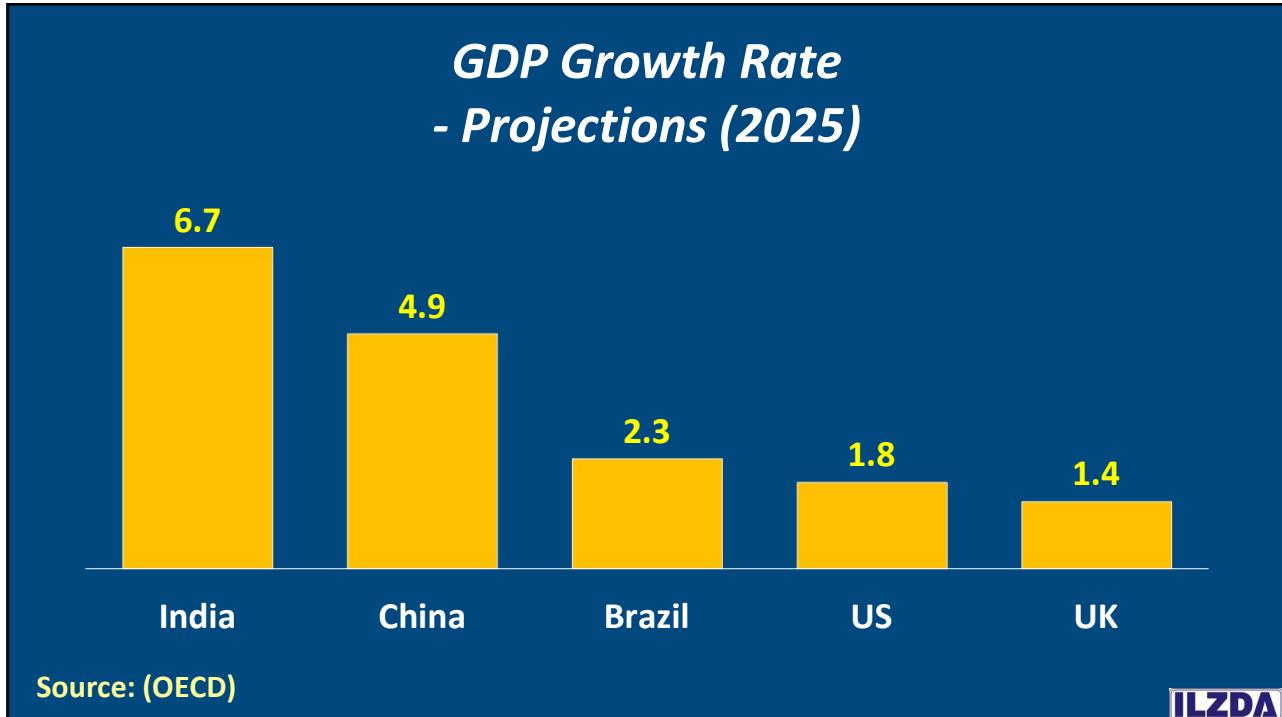
India Ratings revised India's GDP growth forecast for the fiscal year ending March 2026 to 4.8% from the earlier 4.7%, citing robust domestic demand, but cautioned that uncertainty around relations with the US and the impact of the Russia-Ukraine conflict on the economy.

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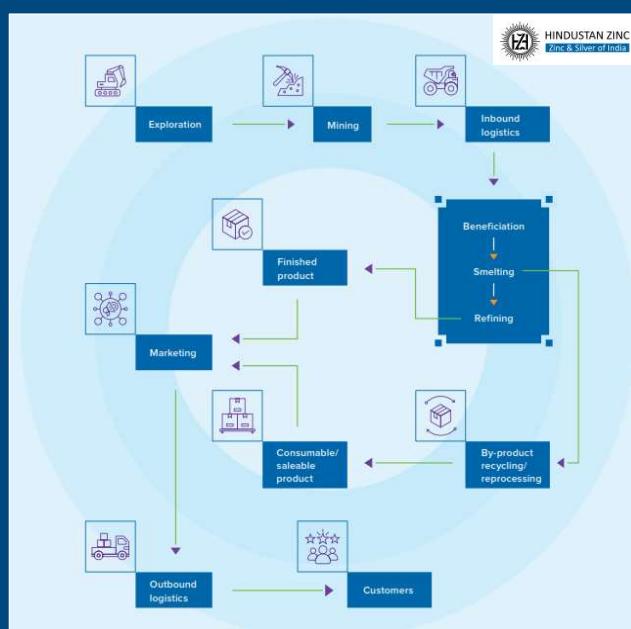
## ZINC STORY



Hindustan Zinc Ltd (HZL)

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## HZL - An Overview



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Most Modern Smelter

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## *Hindustan Zinc Ltd*

- *Originally “Metal Corp of India”*
- *Became a govt company in 1966*
- *Disinvested in 2003, govt holding 28%*
- *An unit of Vedanta Resources located in Udaipur, State of Rajasthan*
- *Both Hydro & Pyro Metallurgy*
- *Refined Metal Capacity: 1.20 Million tpa*
- *Captive Power Plant: 625 MW*
- *Solar Power: 40 MW*
- *Wind Power: 48 MW*

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## **Hindustan Zinc Ltd**

- *One of the largest integrated smelters*
- *Continuous expansion of capacities, in power, mining & smelting*
- *Planning to expand to 2.0 M tonnes/year*
- *A low cost producer*
- *By product recovery, Silver particularly*
- *More emphasis on Renewable energy*
- *Mostly meet's India's domestic demand*
- *Aiming at Critical Minerals now*

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## **HZL**

**Zinc Capacity: 913000 tpa**  
**Primary Zinc Production**

<u>Year*</u>	<u>Production</u>
2022-2023	821000
2023-2024	817000
2024-2025	827000

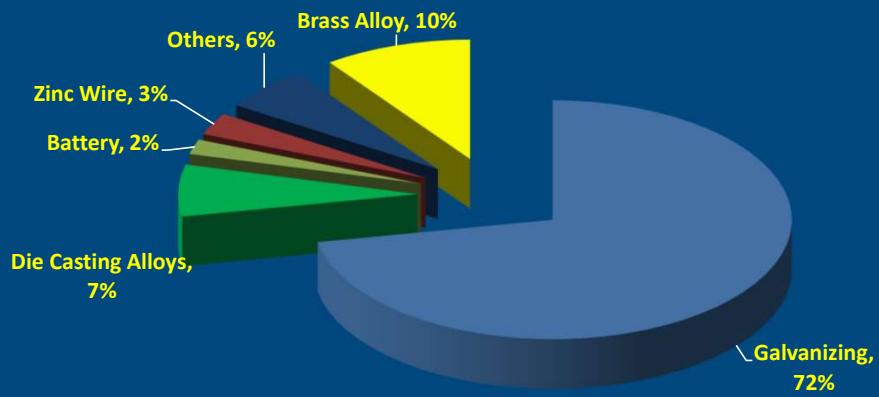


**(Source: HZL)**

**(\*FY: 1<sup>st</sup> April to 31<sup>st</sup> March)**

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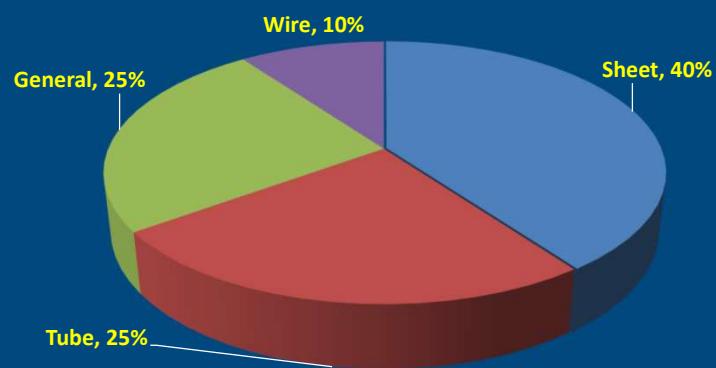
## Zinc Usage in India



(Source: HZL)

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## Galvanizing Sectoral Usage



Huge Opportunity for General Galvanizing

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## *Traditional Applications - General Galvanizing*

*Power  
Transmission  
Line Towers*



*Telecom  
Towers*



*Railway  
Electrification  
Towers*



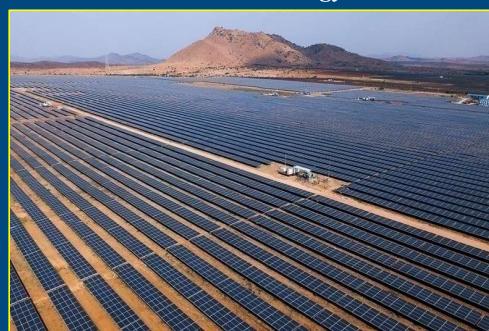
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## *General Galvanizing - Recent Applications*

*Highway Guard Rails*



*Solar Energy*



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## Potential Markets - General Galvanizing



*Railings*



*Automobiles*



*Traffic Signals*



*Platform Structures*



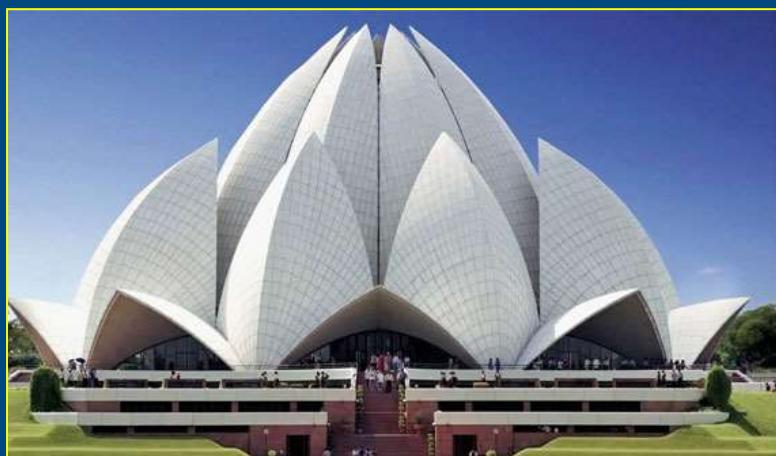
*Galvanized Rebars*

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## Galvanized Rebars in RCC

### FIRST APPLICATION

Lotus Temple, Delhi 1985-ILZDA Initiative



About 400 tons, Galvanized Rebars

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## LEAD STORY

### India's Lead Metal Output

Remarkable growth in India over the last 2 decades



(Source: International Lead & Zinc Study Group)

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### INDIAN LEAD INDUSTRY-AN OVERVIEW

(Million tonnes)

1. Secondary Lead Production : 0.80
2. Primary Lead Production : 0.25
3. Imports : 0.15
4. Total Lead Consumption : 1.20
5. Authorized Recycling Units : 675

Estimated Lead Consumption by 2028 : 1.50

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## HZL

### **Primary Lead Production (tonnes)**

<u>Year</u>	<u>Production</u>
2022-2023	211000
2023-2024	216000
2024-2025	225000

### **Silver Capacity : 800 tpa Silver Production (tonnes)**

<u>Year</u>	<u>Production</u>
2022-2023	714
2023-2024	746
2024-2025	750

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## **LEAD BATTERIES**

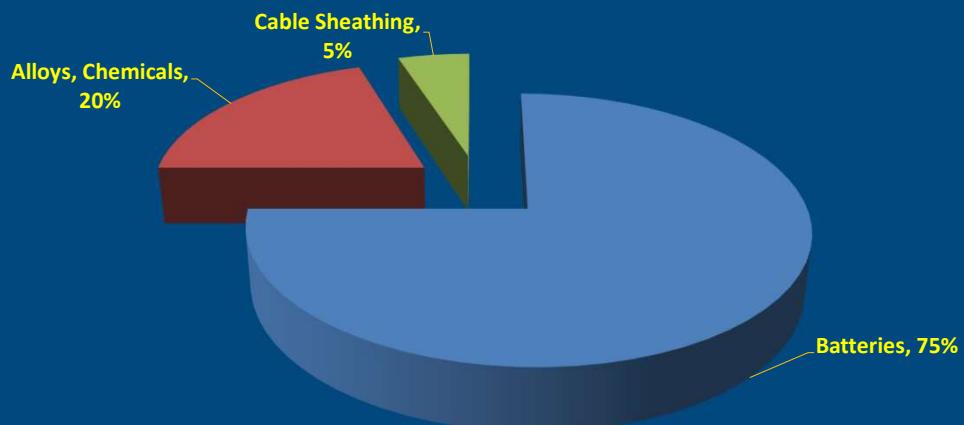


- *Safety*
- *Affordable*
- *Reliable Energy Source*
- *Most Recycled Material (99%)*
- *Cheaper Input for Reuse*
- *Continuous Technology Upgradation*
- *Well Established, Steady Growth*
- *CAGR, 2024-2030 : 6%*



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## LEAD USAGE IN INDIA



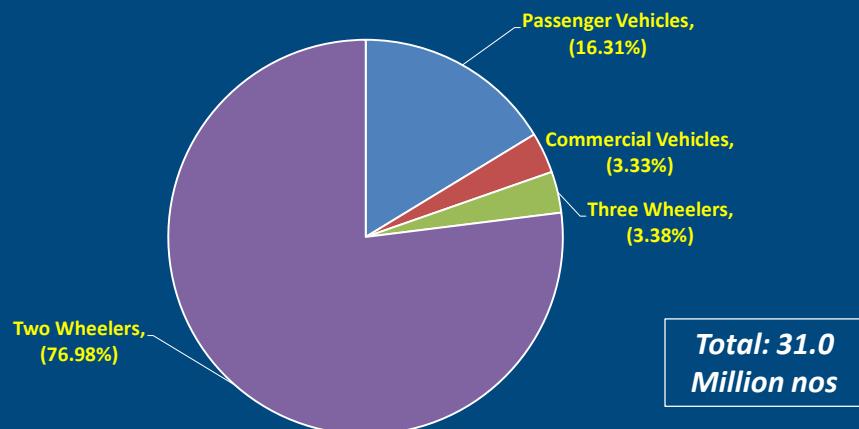
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## Lead Battery – In Our Daily Life



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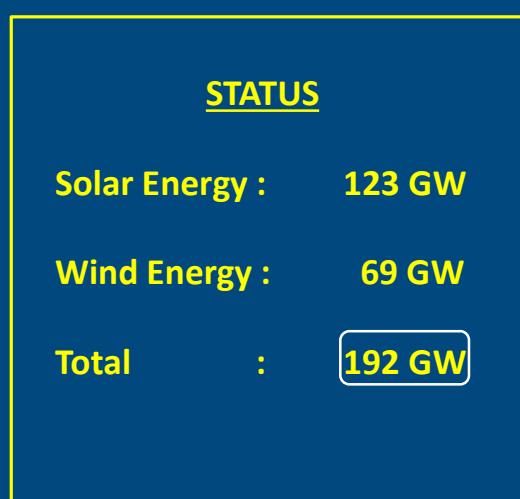
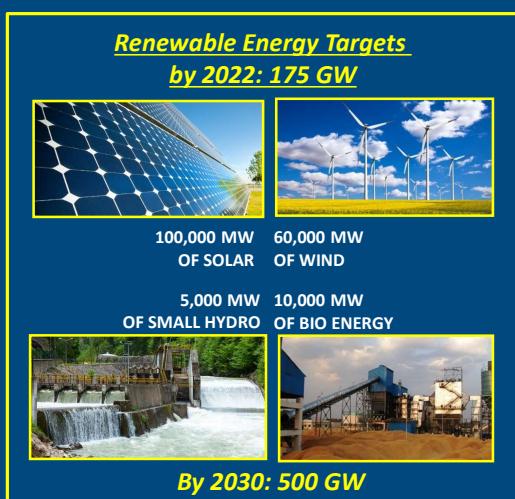
## Indian Automobile Production Trends (2024-25)



(Source: SIAM)

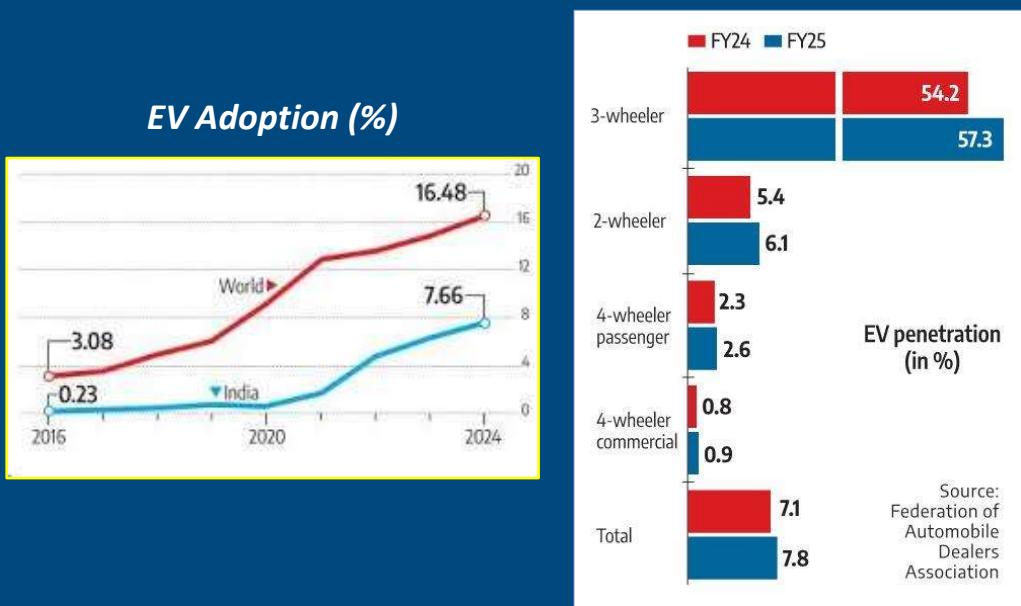
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## Renewable Energy Mission



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## ELECTRIC MOBILITY MISSION



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## BATTERY WASTE MANAGEMENT RULES - 2022

- ❖ **Notified in 2022, superceding BMHR 2001**
- ❖ **Waste Battery:**
  - Used EOL batteries
  - Pre-consumer, off spec batteries
  - Expired Batteries
  - Discarded batteries
- ❖ **Applies to:**

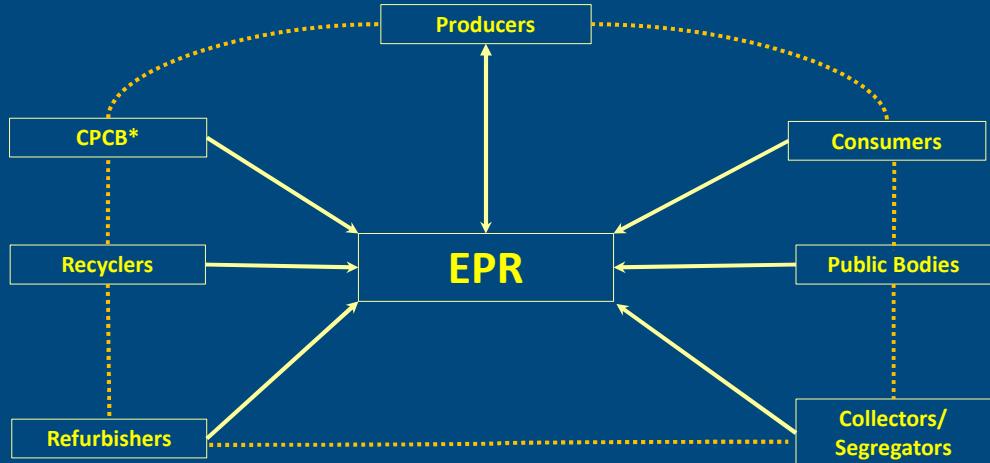
**Every producer, dealer, consumer & entities involved in collection, segregation, transport & recycling**
- ❖ **Exempts:**

**Batteries used in defence & space equipments**

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## BWMR-2022

### *EPR & Multi Stakeholder Responsibilities*

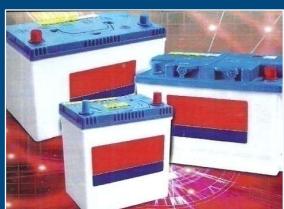


\*CPCB – Central Pollution Control Board

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LEADCONCLAVE 2025

**ILZDA International Conference on**  
**LEAD & LEAD BATTERIES**  
**– UNLOCKING THEIR TRUE POTENTIAL**  
**1 & 2 December 2025, IIC, New Delhi**



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**THANK YOU**



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