

# Demand Assessment Report 2018-27

## Electrical Equipment

IEEMA is undertaking a detailed Demand Assessment study for different industry segments for the period 2018- 27. E&Y has been appointed as the knowledge partner.

### OBJECTIVES

- Assessment of Power Sector development plans in Generation, Transmission and Distribution - 5/10 years
- Assessment of development plan of other major user segments such as Railways
- Assessment of requirement of Renovations & Modernizations
- Translate these plans into opportunities for Electrical Equipment industry
- Demand Assessment for various electrical equipment segments for 2018-22
- Identify possible major technological transitions and present technology gaps/ disruptions

### PRODUCT GROUPS

PRODUCT GROUP	PRODUCTS COVERED
1. MV-HV Switchgear	Medium and High Voltage circuit breakers, Isolators, GIS, RMUs
2. LV Switchgear	Low Voltage equipment like ACB, MCCB, Contactor
3. Distribution Transformer	Distribution Transformers (REC range and Up to 5 MVA)
4. Power Transformer	(a) Power Transformers (5 MVA and above), (b) Reactors
5. Cables	Power Cables (Up to 132 KV and Above 132 KV), AB Cables, Control Cables
6. Transmission Lines	(a) TL Tower/ Monopoles and (b) Hardware Accessories
7. Conductors	Conductors – AAC / AAAC, HTLS etc
8. Insulators	Insulators Disc Insulators (including sub-station insulators), Solid Core & Long Rod Insulators (Porcelain/ Polymer)
9. Capacitor	(a) LT & HT Power Capacitors, (b) APFC Panels
10. Energy Meters	Single phase, Poly phase Smart Meters – various types, including Pre-paid
11. Instrument Transformers	Current and Potential Transformers, CVT
12. Surge Arresters	Surge Arresters
13. Rotating Machines	(a) LT & HT Induction Motors, (b) Traction Motors
14. Smart Grid Eqpt. and Solutions	Control Centre, Substation Automation (RTUs, IEDs Alternators, Generators, Drives etc.), AMI, DMS, Outage Management, other software
15. EPC Projects	Transmission Lines, Substation and other distribution projects

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## DRIVERS & DISRUPTERS (broad categories)

- Growth in Power sector infrastructure
- Grid connected RE
- Offgrid Solutions
- Railway Infrastructure
- Other infrastructure
- Industrial growth
- Policy interventions
- Technology trends
- Total electric mobility by 2030

**Drivers and Disrupters shortlisted in consultation with all product sector experts from within the industry**

## PERIOD COVERED

- Detailed assessment for 2018-2022 (5 years) along with Year wise demand estimation
- Long-term power sector outlook – 10 year outlook and its implications on the electrical equipment sector
- Mid-term review in 2021.

## PROCESS

- Primary and Secondary Research
- Interaction with Industry Experts of respective sectors, within and outside IEEMA
- Statistical Modelling

## PRIMARY RESEARCH ( covering 150 entities )

- All Central and select State Utilities (Discoms, Transcoms Gencos) including CPSUs,
- Govt. entities like CEA, REC, PFC, other concerned departments, Niti Ayog etc.
- Ministries – MNRE, Power, DHI, DIP, DOC
- Private Transmission companies Adani, Reliance, Tata, Sterlite
- Renewable Energy Developers and EPC players
- Railways, DMRC, State level Metros, DFCC, IPPs
- MES OEMs/ Manufacturers/Major Industries like Metals, Petro, Chemical, Sugar, Cold storage etc.

## SECONDARY RESEARCH

- Data analysis and Demand estimation
- Assessment of Technology developments and Gaps (International Benchmarking)
- Current state of industry – Production levels, Capacity Utilization, Tech quotient etc.

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- Industrial sector
- Railways
- E-mobility

### Section 2: Power Sector growth outlook

- Achievements in 12th plan
- National energy demand scenario in 13th plan
- 13th plan infrastructure growth outlook
- Long term demand outlook
- Key power sector programs under implementation

### Section 4: Forecasting framework

- Forecasting framework
- Key considerations
- Historical market sizing
- Results of primary interaction

### Section 5: Demand forecast

- Primary research based demand forecast
- Statistical modelling based demand forecast
- 14th plan outlook

## PRODUCT GROUP WISE COST

S. No.	1	2	3	4	5	6	7	8	9	10
Number of Products	Single group	Two groups	Three groups	Four groups	Five groups	Six groups	Seven groups	Eight groups	Nine groups	All groups
Price (in INR) + GST	1,30,000	2,30,000	3,00,000	3,70,000	4,40,000	5,00,000	5,50,000	6,00,000	6,40,000	7,00,000

**Concession of 50% to members having a turnover up-to Rs. 50 Cr. in FY 2017-18.**

To avail the discount, member must submit certified copy of latest Audited Financial Report