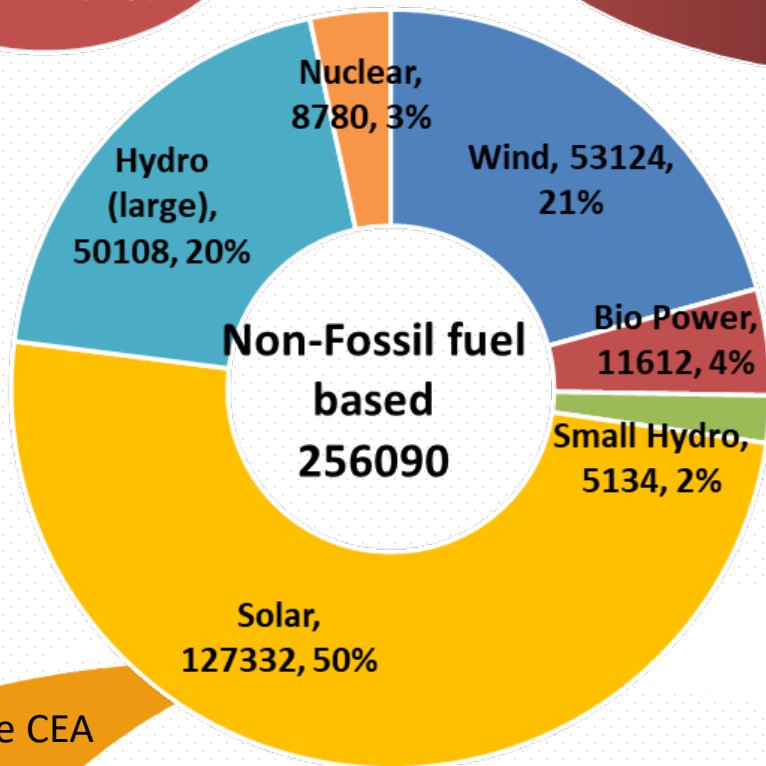
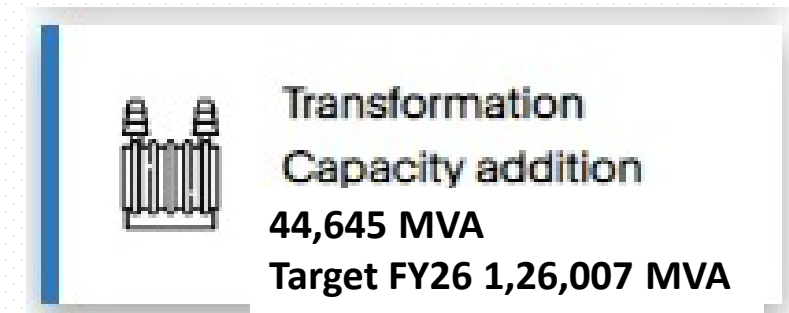
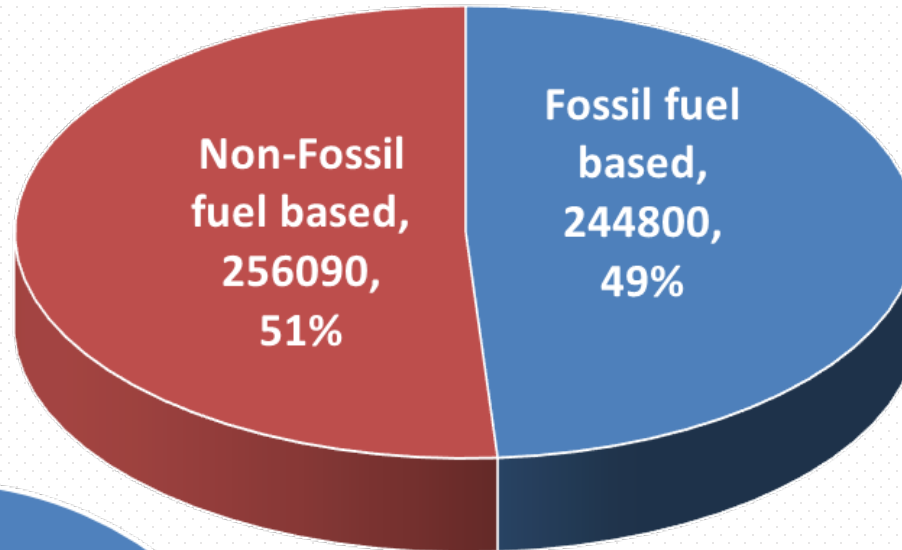
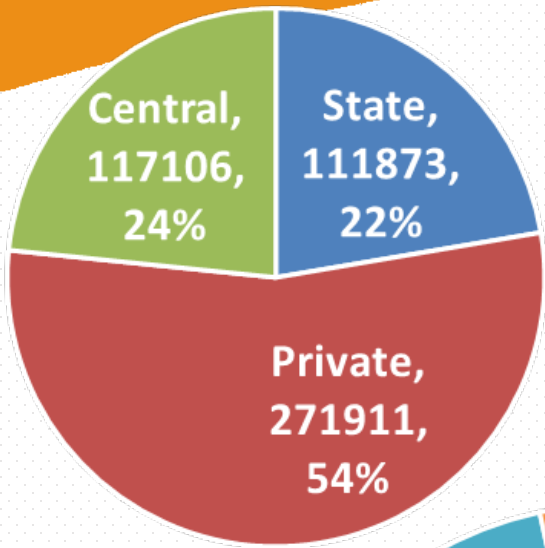




Status - Indian Electrical Industry April to September 2025

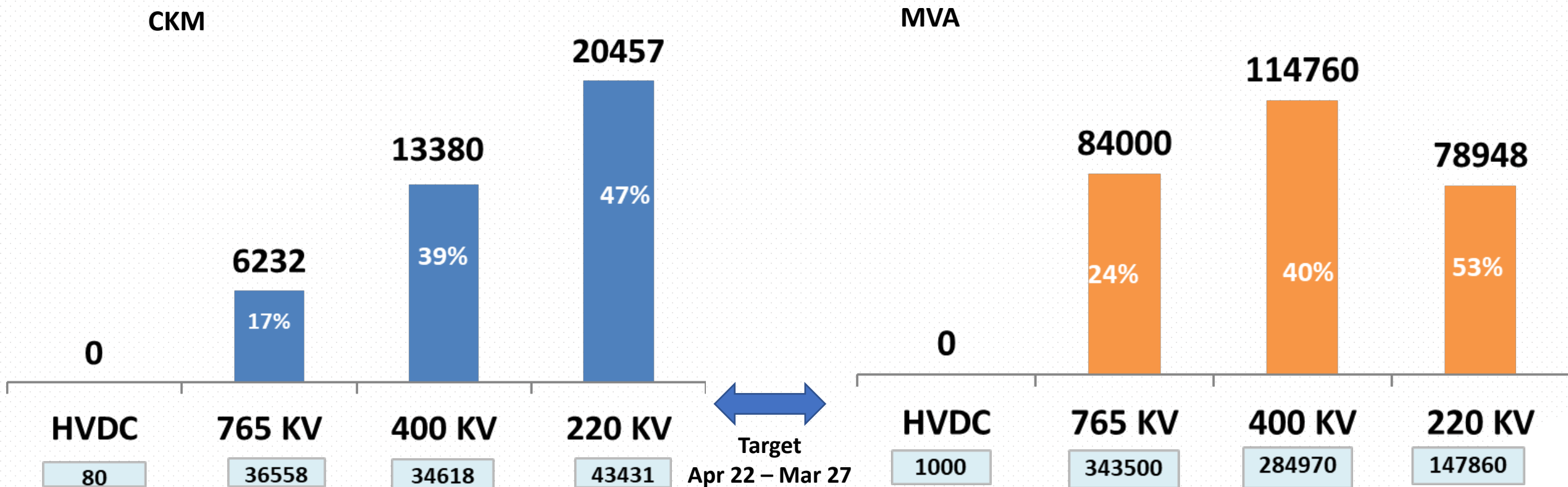
Indian Power sector till September 2025

Installed Generation Capacity as on 31 Sep 2025 is 5,00,889 MW



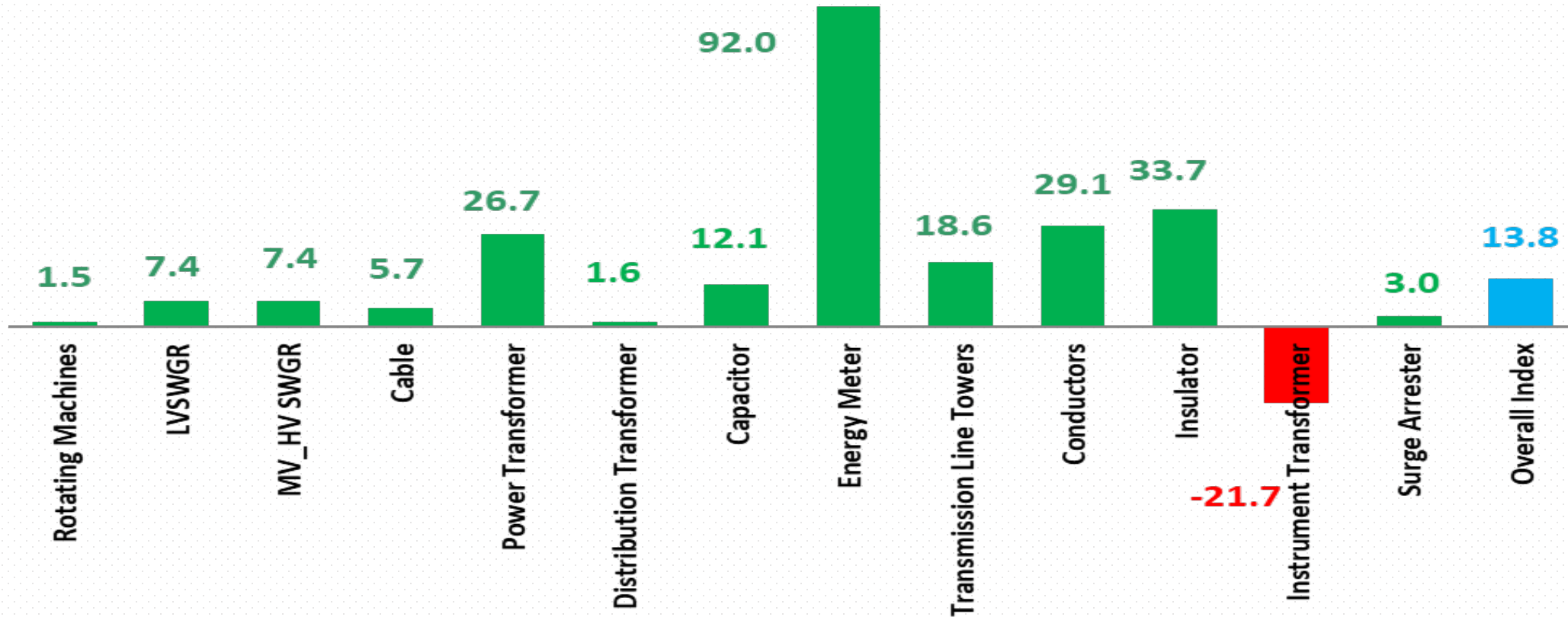
25,684 MW generation capacity added in Apr – Sep 25, 89% is Non-Fossil fuel based

Status of Transmission & Substation: Target of 5 years FY22 – FY27 vs Achievement till Sep 25 (FY22-23 to Sep 25)



- More than 50% of the set target by FY 27 is to be achieved in coming 2 years

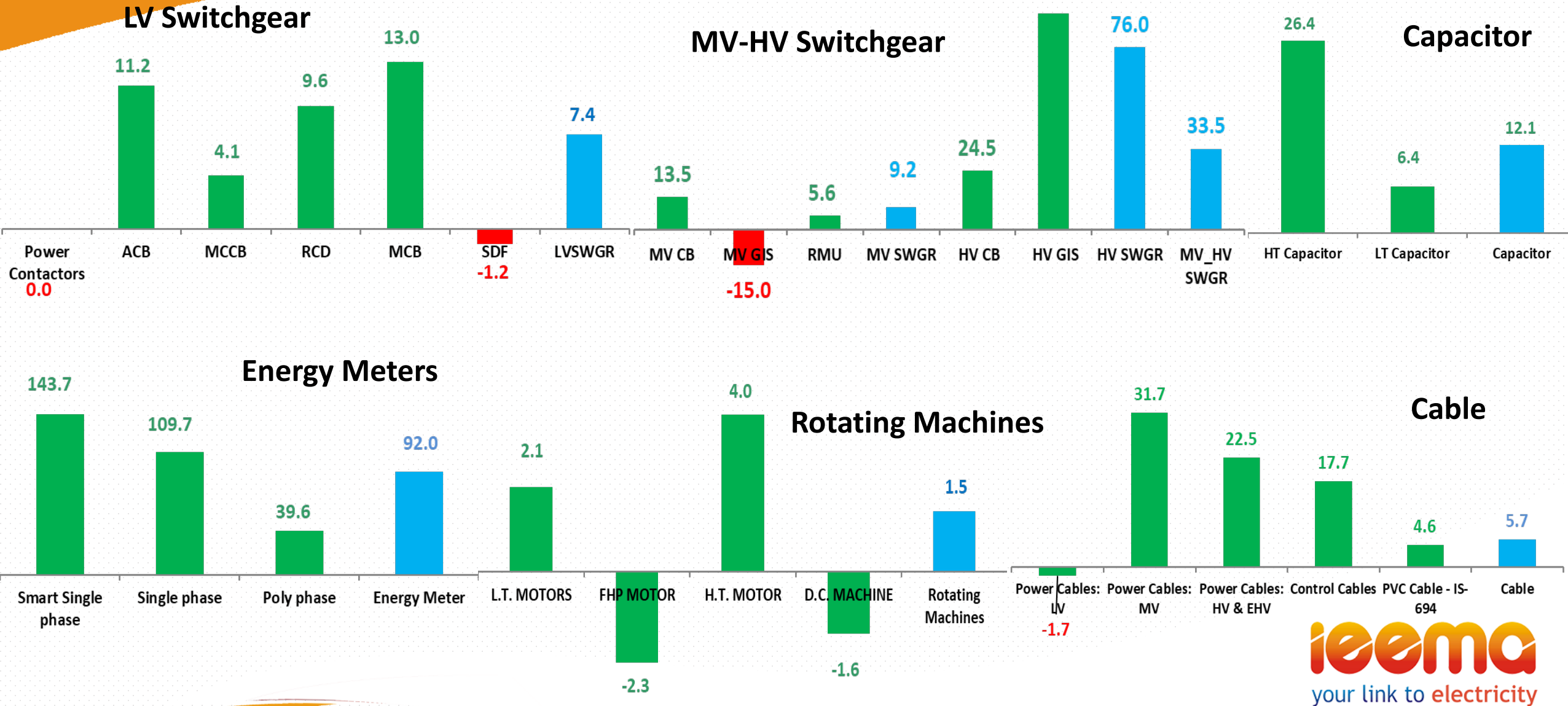
Growth Index for Electrical Equipment industry Apr 2025 – Sep 2025 compared with Apr 2024 – Sep 2024



- MV, HV segments shown growth for most of the products
- Increase for Smart Meters, New tech conductors showing growth & increase in share in total production
- Instrument TRFs showing decline compared to last year huge growth mainly in LV CTs, for H1FY26 MV and HV seen growth

Sector wise break-up of % Growth Index

Apr 2025 – Sep 2025 compared with Apr 2024 – Sep 2024



Detailed Growth Index for Electrical Equipment Industry

Product Category	Apr - Sep 25 comapred to Apr - Sep 24	Product Category	Apr - Sep 25 comapred to Apr - Sep 24
L.T. Motors	2.1	MV CB	13.5
FHP Motors	-2.3	MV GIS	-15.0
H.T. Motors	4.0	RMU	5.6
D.C. Machine	-1.6	MV SWGR	9.2
Rotating Machines	1.5	HV CB	24.5
Power Cables: LV	-1.7	HV GIS	100.2
Power Cables: MV	31.7	HV SWGR	76.0
Power Cables: HV & EHV	22.5	HV_MV Swgr	33.5
Control Cables & other Special Purpose Cables	17.7	Power Contactors	0.0
PVC Cable - IS-694	4.6	ACB	11.2
Cable	5.7	MCCB	4.1
Distribution Transformer	1.6	RCD	9.6
Power Transformer	26.7	MCB	13.0
Transformer	14.6	SDF	-1.2
Smart Single phase	143.7	LVSWGR	7.4
Single phase	109.7	Current Transformer	-30.7
Poly phase	39.6	Voltage Transformer	14.1
Meter	92.0	Instrument Transformer	-21.7
Conductors	29.1	Polymer	12.8
Transmission Line Towers	18.6	Porcelain	-24.4
Tramsmission Lines	24.1	Surge Arrester	3.0
HT Capacitor	26.4	Porcelain	25.3
LT Capacitor	6.4	Composite	49.6
Capacitor	12.1	Insulator	33.7

**Overall Electrical
Equipment Industry
Growth Index**



Apr - Sep 25
comapred to
Apr - Sep 24

13.8

Quarterly Growth Index for Electrical Equipment Industry

Product	Q1 FY 25 compared to Q1 FY 24	Q2 FY 25 compared to Q2 FY 24	Q3 FY 25 compared to Q3 FY 24	Q4 FY 25 compared to Q4 FY 24	Q1 FY 26 compared to Q1 FY 25	Q2 FY 26 compared to Q2 FY 25
Rotating Machines	10.1	17.9	10.0	5.6	3.4	0.1
LV Switchgear	15.9	5.4	23.2	15.6	7.6	7.3
HV Switchgear	36.8	27.8	26.8	-0.3	30.6	38.2
Cables	14.2	6.9	11.6	-1.2	4.6	7.3
Power Transformers	53.8	23.6	38.0	32.9	21.6	27.8
Dist Transformers	33.3	14.7	10.5	17.6	-5.6	8.9
Capacitors	-7.5	11.3	-9.5	3.0	8.1	15.6
Energy Meters	13.1	1.6	22.1	44.6	88.3	96.7
Transmission Lines	34.3	31.5	6.6	3.7	18.1	19.4
Conductors	5.1	-11.0	9.2	11.4	21.2	41.6
Insulators	27.6	12.0	2.9	10.9	21.2	58.6
Electrical Equipment Industry Growth Index	21.6	12.7	16.7	10.2	11.7	16.4

Most of the product seen growth QOQ

Import and Export data

ITC codes	Product Groups	Apr - Sep FY 2025-26		Apr - Sep FY 2024-25		April - Sep FY 26 Vs FY 25		Domestic % Growth April - Sep FY 26 Vs FY 25
		Import	Export	Import	Export	Import	Export	
		Value in Rs. Crores		Value in Rs. Crores		% Variation		
8501 excl. 850110 & 20	Motors & AC Generators	5478	3164	4193	2860	31	11	1.5
850423	Power TRF	89	363	361	638	-75	-43	26.7
850421-22, 850433-34	Distribution TRF	1294	2038	538	2042	141	0	1.6
853210	Capacitors	77	230	176	239	-56	-4	14.6
8535, 853720	HV SWGR incl. Panels	1908	2506	1570	1784	22	40	33.5
8536, 853710	LT Switchgears incl Panels	13183	9507	10521	8379	25	13	7.4
854442/49/60	Cables - LV & HV	1489	5688	1176	4131	27	38	5.7
902830	Energy Meters	29	230	35	271	-17	-15	92.0
73082011/19	Tr. Line Towers	11	1514	15	1478	-25	2	18.6
7604 & 7614	Conductors	464	1870	567	2094	-18	-11	29.1
854610, 20, 90	Insulators	29	230	35	271	-17	-15	33.7
847190/850410,40/903289	Power Electronics	13679	9330	11939	7775	15	20	NA
8502	Generating Sets	1052	2935	579	3018	82	-3	NA

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