

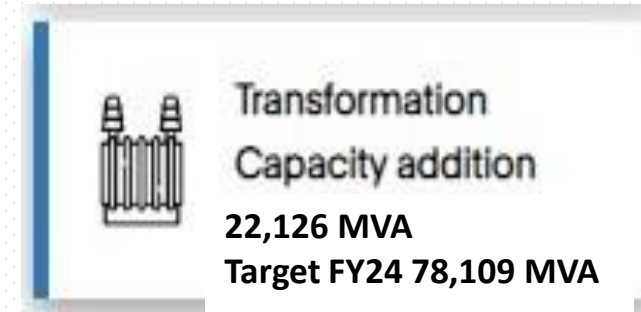
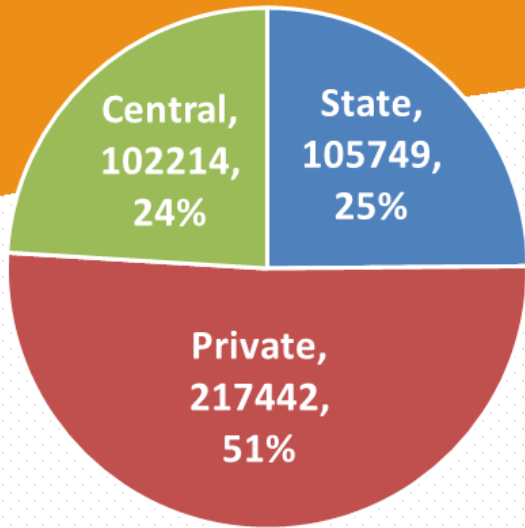


Status - Indian Electrical Industry April to Sept 2023 (1st HY FY24)

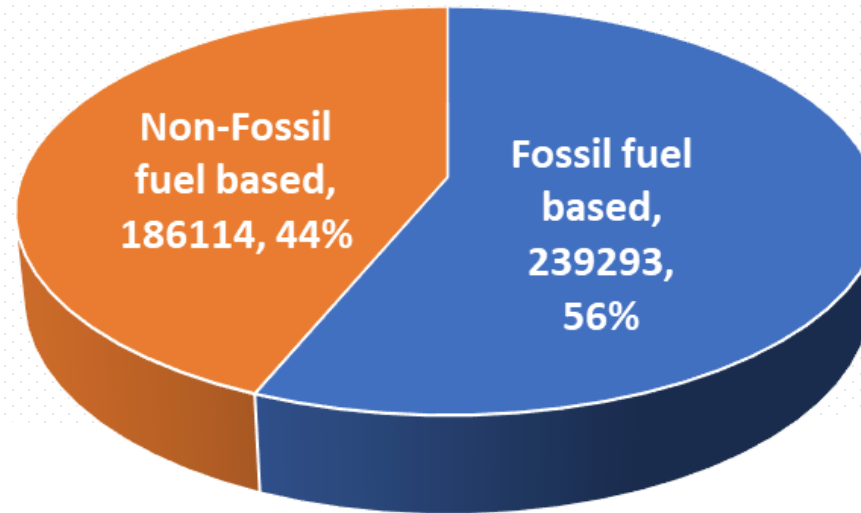
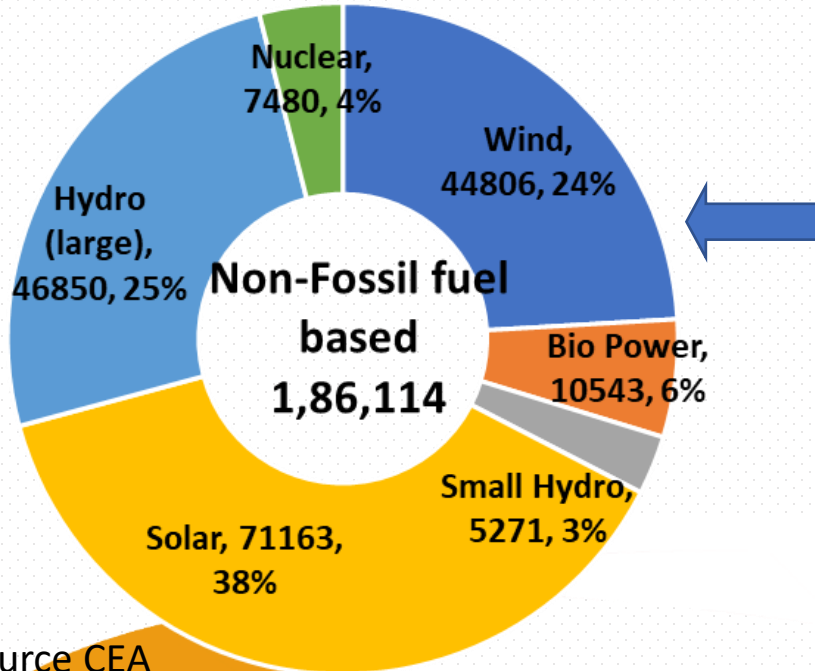
Indian Power sector till Sep 23

Installed Generation Capacity as on 30 Sep 2023 is 4,25,406 MW

9,347 MW generation capacity added in H1FY24, 71% is Non-Fossil fuel based

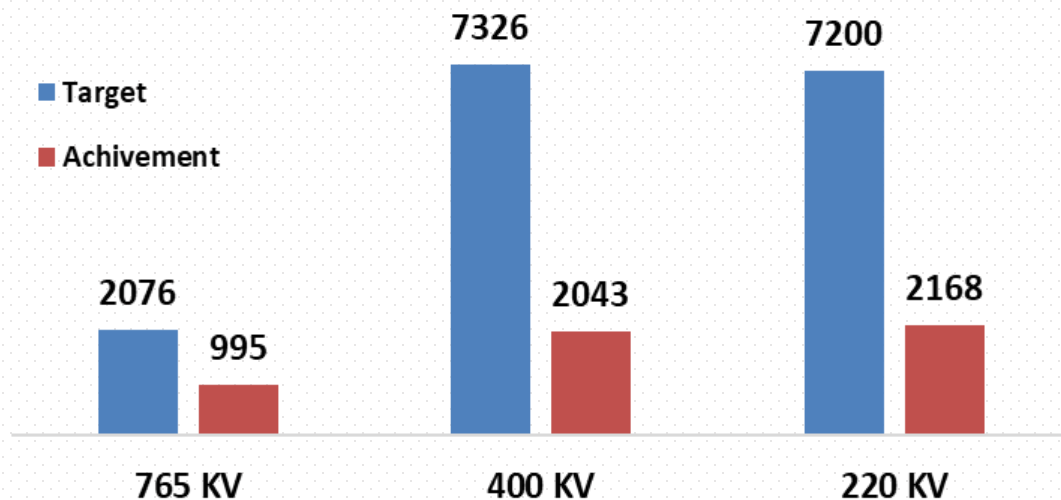


All India Installed Capacity (MW) as on Sep 23



Indian Power sector till Sep 23

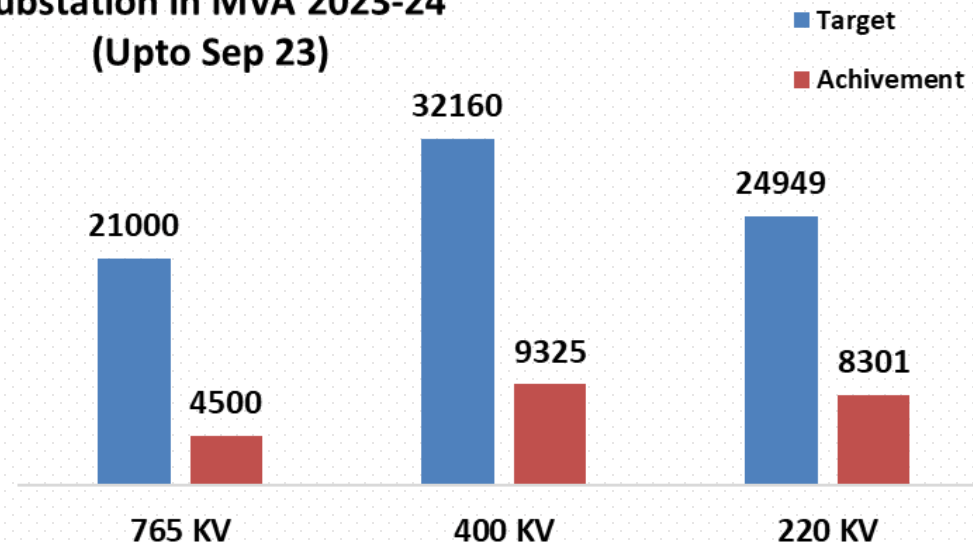
**Transmission Lines in CKM 2023-24
(Upto Sep 23)**



Transmission Lines:

5,206 achieved up to Sep 23 against annual target of 16,602 CKM of FY24 (31%)

**Substation in MVA 2023-24
(Upto Sep 23)**



Transformation Capacity (Sub-Stations):

22,126 MVA achieved up to Sep 23 against annual target of 78,109 MVA of FY24 (28%)

The tentative additional ckm and MVA capacity under ISTS, required for integration of additional RE capacity by 2030 is given

	±800	±350	765	400	220	Total
Transmission Lines (ckm)	6200	1920	25960	15758	1052	50890
Sub-station capacity (MVA)	20000	5000	274500	134075	0	433575

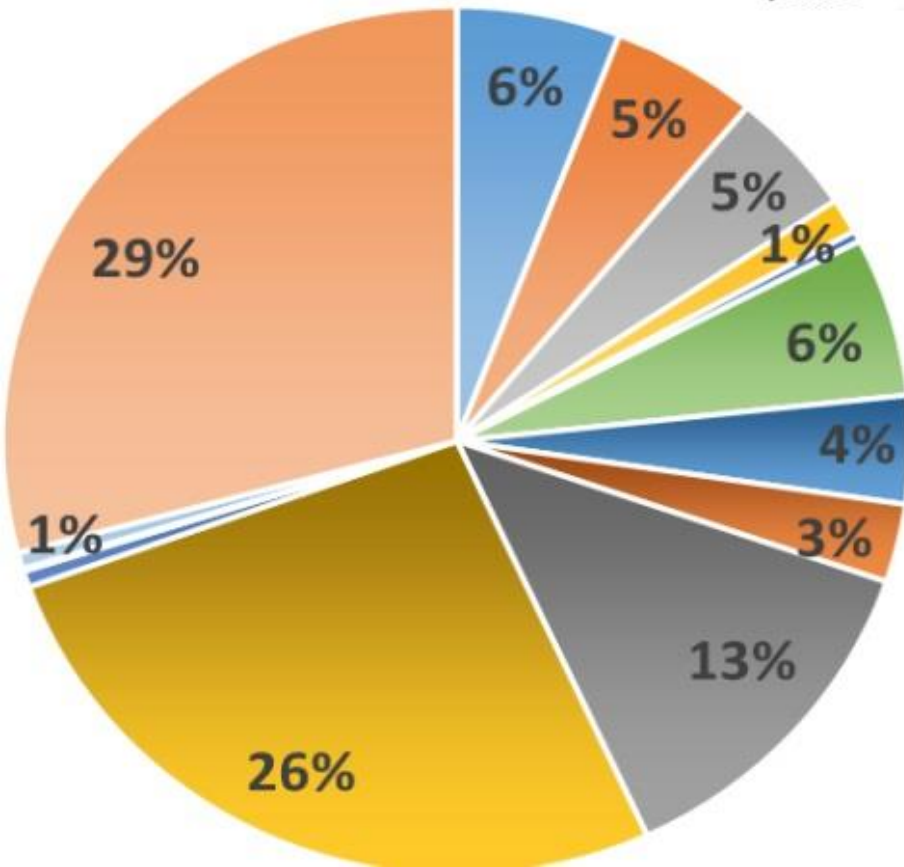


Sector wise break up of major electrical equipment

FY2022-2023

Overall domestic Power Equipment production/ output excl. EPC, Services and other allied business is estimated at Rs. 2.6 Lac crs / USD 33 bn (Growth of 18% over last year FY21-22)

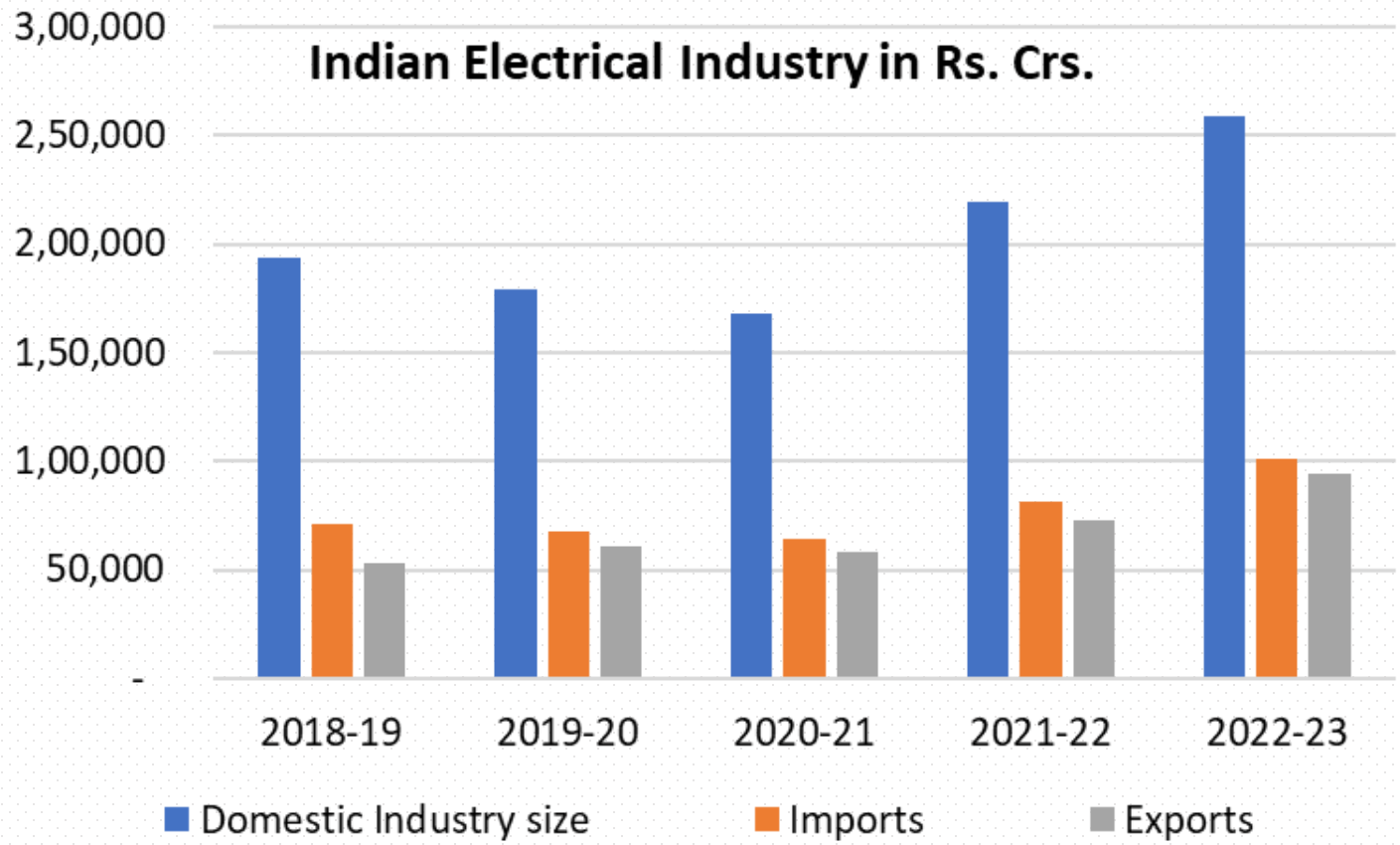
Industry represents 45% in Capital Goods sector, 6.8% in Total Manufacturing and 1% in GDP in India



- Rotating Machine
- Energy Meter
- Transmission Line Tower
- Cables
- Insulator

- Distribution Transformer
- Capacitor
- HV_MV Switchgear
- Instrument Transformer
- Other Electrical Equipment

- Power Transformer
- Conductor
- LV Switchgear
- Surge Arretster



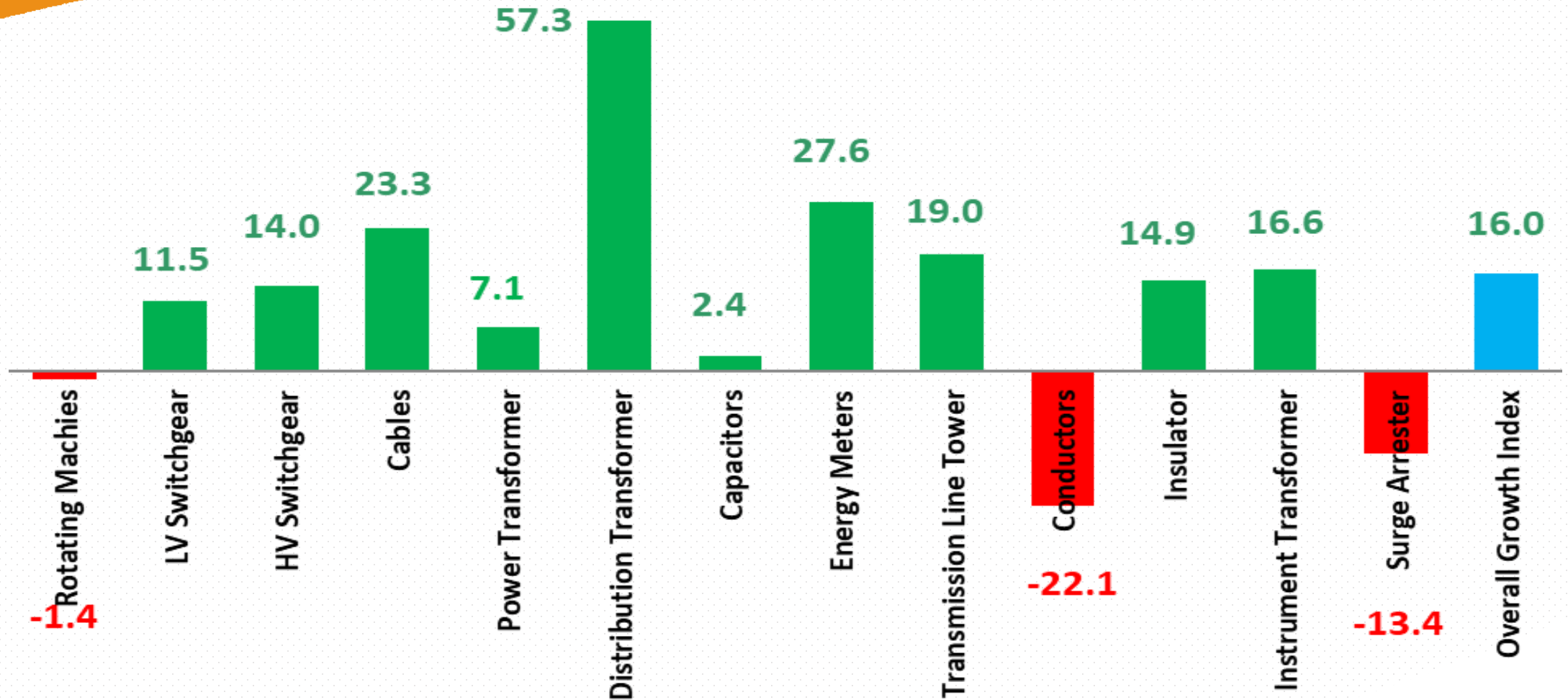
India's Exports and Imports scenario

- Overall Exports have increased by 30% last year.
- Major products exported – Rotating Machines, Power Electronics, Switchgear & Panels, Transformers, Cable & TLT
- Exporting Countries – USA, UAE, Germany, UK, Bangladesh
- Imports increased by 24% in last year especially for Power Electronics, Transformers & parts, LV and HV Cables, LV & HV Custom built products, Rotating Machines etc
- China still accounts for about 37% share in Imports followed by Germany and Japan



Growth Index for Electrical Equipment industry

Apr 2023 – Sep 2023 compared with Apr 2022 – Sep 2022



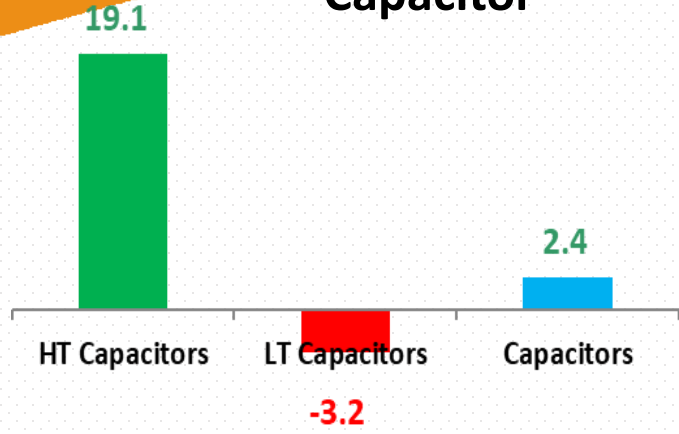
Overall growth seen in H1FY24 except for Rotating Machines, Conductors

LV, MV segment shown growth for most of the products

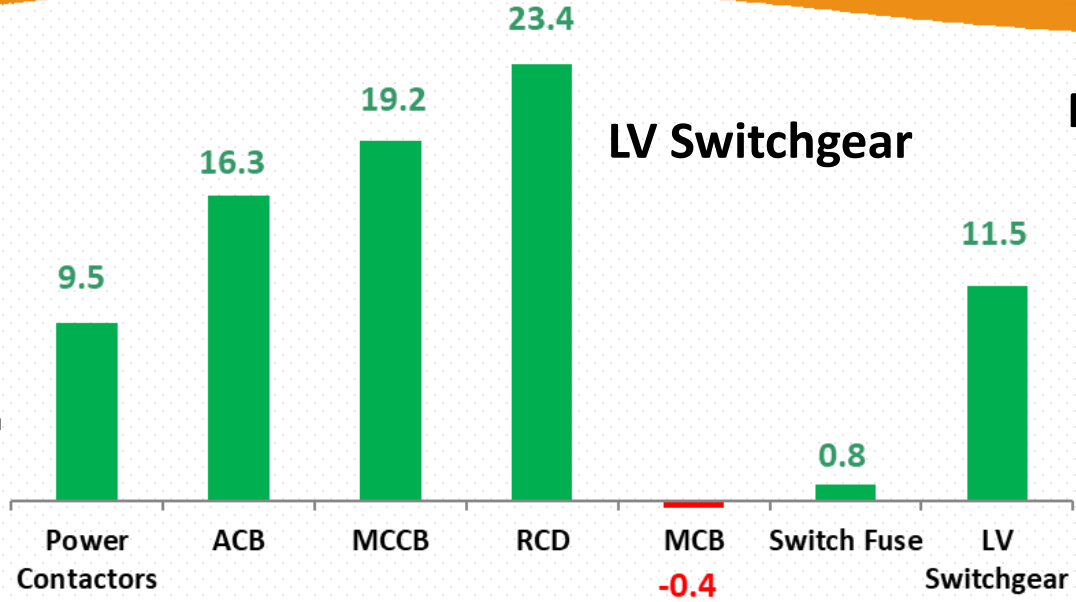
Production is supported by domestic as well as exports orders, increase for Smart Meters

Sector wise break-up of % Growth Index Apr 23 – Sep 23 over Apr 22 – Sep 22

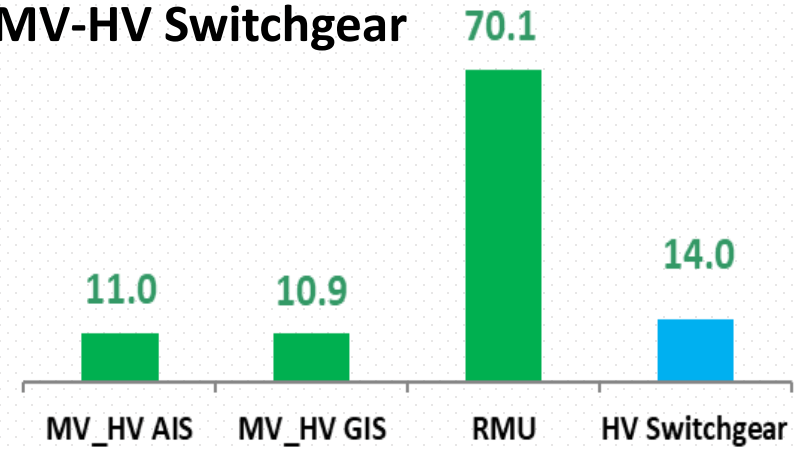
Capacitor



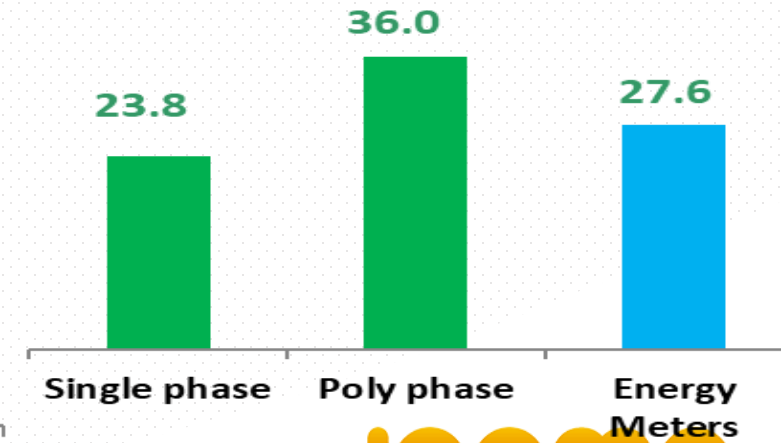
LV Switchgear



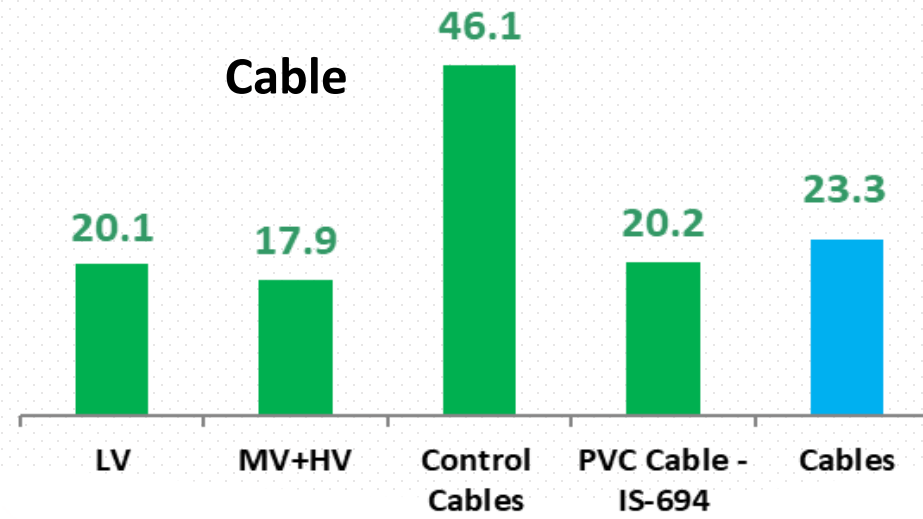
MV-HV Switchgear



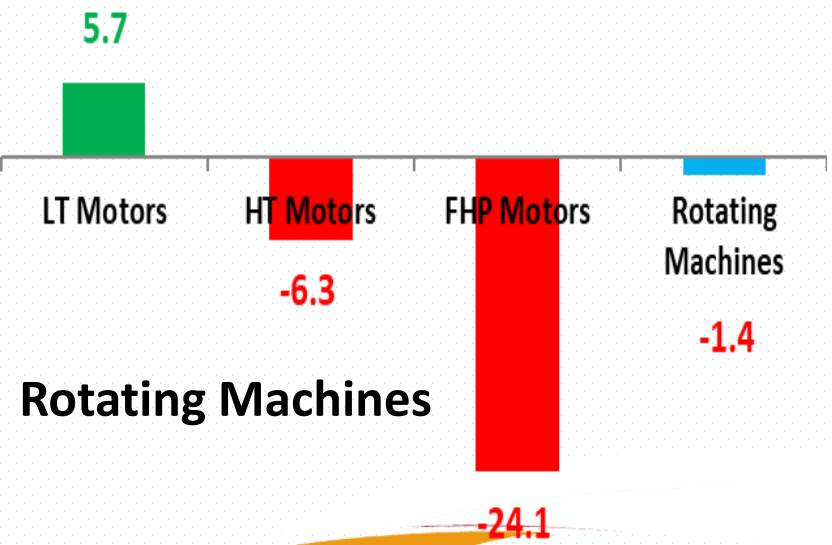
Energy Meters



Cable



Rotating Machines



Detailed Growth Index for Electrical Equipment Industry

Product Category	Apr - Sep 23 compared to Apr - Sep 22	Product Category	Apr - Sep 23 compared to Apr - Sep 22
L.T. Motors	5.7	HT Circuit Breakers - AIS	11.0
FHP Motors	-24.1	MV_HV GIS	10.9
H.T. Motors	-6.3	RMU	70.1
D.C. Machine	-35.0	HV SWGR	14.0
Rotating Machines	-1.4	Power Contactors	9.5
Power Cables: LV	20.1	ACB	16.3
Power Cables: MV+HV	17.9	MCCB	19.2
Control Cables & other Special Purpose Cables	46.1	RCD	23.4
PVC Cable - IS-694	20.2	MCB	-0.4
Cable	23.3	SDF	0.8
Distribution Transformer	57.3	LVSWGR	11.5
Power Transformer	7.1	Switchgear	12.0
Transformer	33.6	Current Transformer	11.6
Single phase	23.8	Voltage Transformer	27.5
Poly phase	36.0	Instrument Transformer	16.6
Meter	27.6	Polymer	-19.2
Conductors	-22.1	Porcelain	0.6
Transmission Line Towers	19.0	Surge Arrester	-13.4
Transmission Lines	-5.4	Porcelain	0.6
HT Capacitor	19.1	Composite	61.5
LT Capacitor	-3.2	Insulator	14.9
Capacitor	2.4		

**Overall Electrical
Equipment Industry
Growth Index**



Apr - Sep 23
compared to
Apr - Sep 22

16.0

Import and Export data

ITC codes	Product Groups	April - Sep FY 2023-24		April - Sep FY 2023-24		Domestic % Growth H1FY24 over H1FY23
		Import	Export	Import	Export	
		Value in Rs. Crores		% Variation		
8501 excl. 850110 & 20	Motors & AC Generators	3933	2504	11	20	(-) 1.4
850423	Power TRF	57	512	-61	7	7.1
850421-22, 850433-34	Distribution TRF	554	1944	76	71	57.3
853210	Capacitors	331	217	-14	33	2.4
8535, 853720	HV SWGR incl. Panels	802	1495	28	13	14.0
8536, 853710	LT Switchgears incl Panels #	9097	6729	16	14	11.5
854442/49/60	Cables - LV & HV	982	4260	31	32	23.3
902830	Energy Meters	30	169	173	34	27.6
73082011/19	Tr. Line Towers	11	1722	-56	-17	19.0
7604 & 7614	Conductors	435	3053	4	34	(-) 22.1

- Import – top countries - China, Germany, Singapore
- Export – top countries - USA, UK, UAE

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