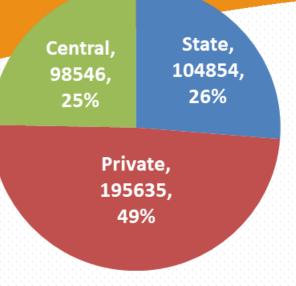
Status - Indian Electrical Industry April to March 2021-2022

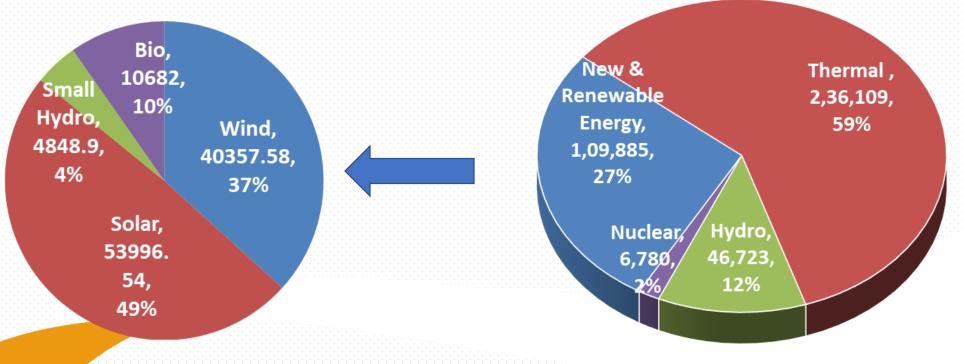
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Status of Power Generation till March 2022

Installed Generation Capacity as on 31st March 2022 is 3,99,497 MW 15,450 MW Capacity Addition in FY 22 from RE

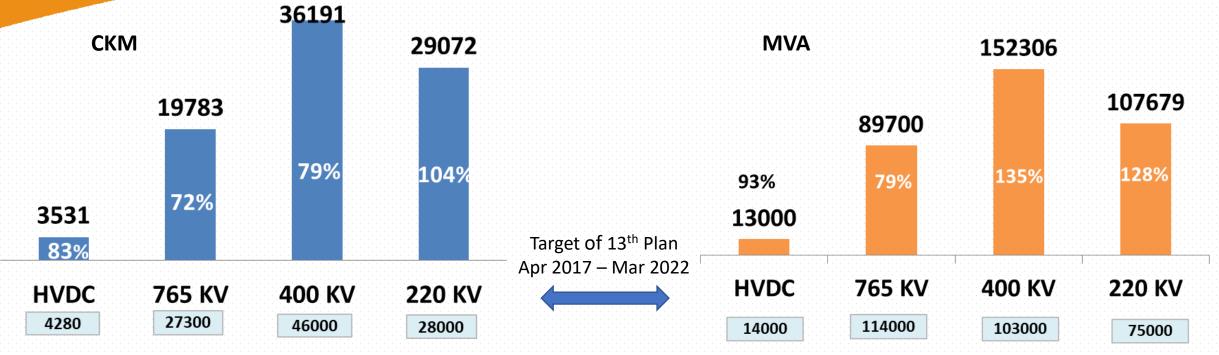
India's renewable energy installed capacity to reach 500 GW by 2030.





Status of Transmission & Substation

Achievement during April 2017 to March 2022



Transmission Lines:

14,895 CKM achieved up to Mar 22 against annual target of 19,255 CKM of FY22 (77%)

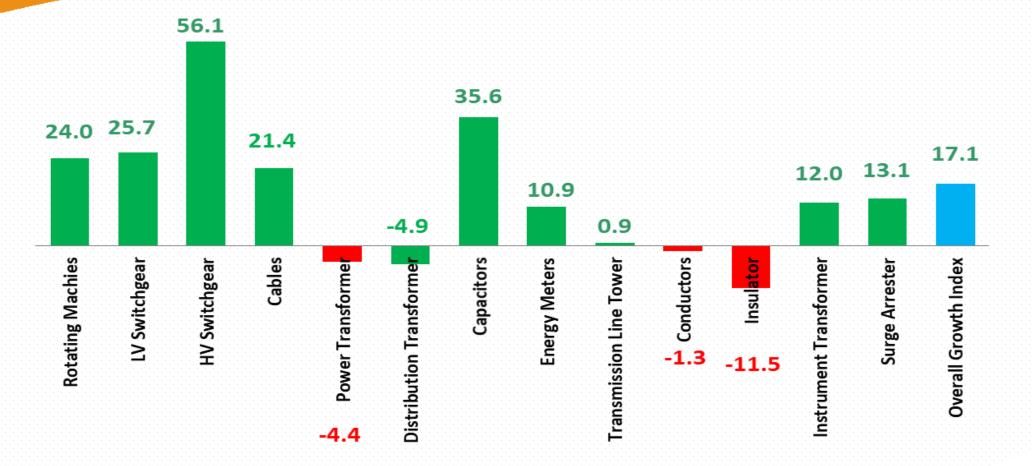
Transformation Capacity (Sub-Stations):

78,982 MVA achieved up to Mar 22 against annual target of 81,545 MVA of FY22 (97%)

India has achieved more that its target installation of transmission lines and Sub-stations; mostly up to 400 KV Focus is on 765 KV and HVDC completion of Transmission Line and Transformation Capacity thru Sub-Stations



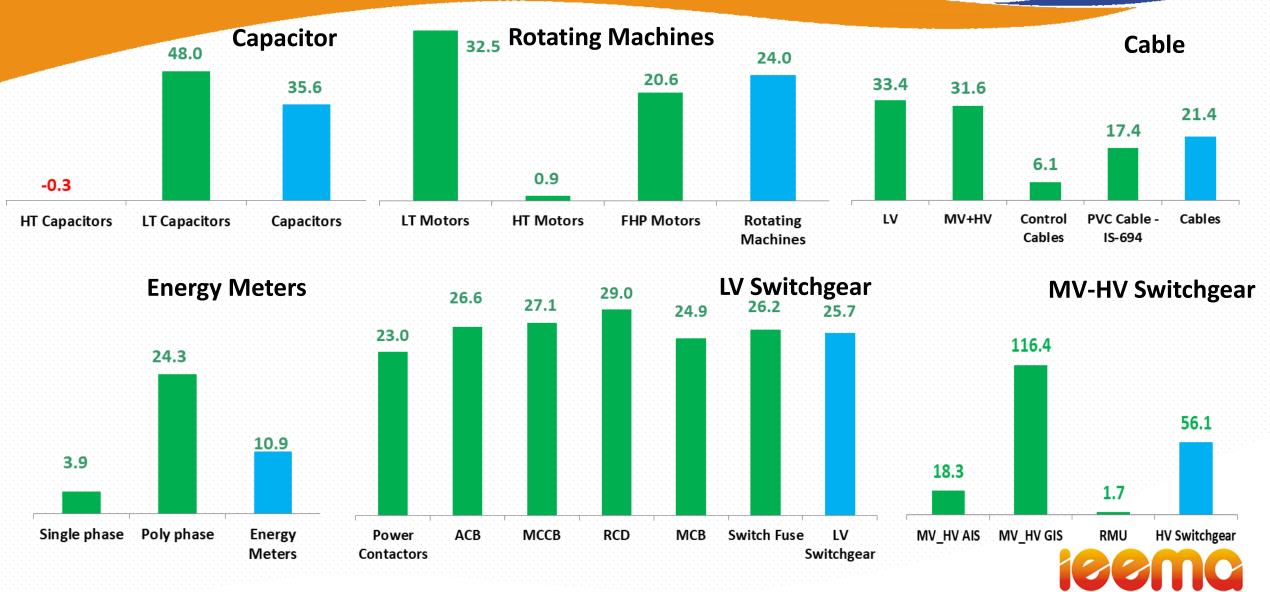
Growth Index for Electrical Equipment industry Apr 2021 – Mar 2022 compared with Apr 2020 – Mar 2021



- Power equipment industry in FY2021-22 witnessed a V-shape recovery and registered a growth of 17% over FY2020-21; a pandemic affected year.
- The growth is due to support of growth in Exports in almost all segments



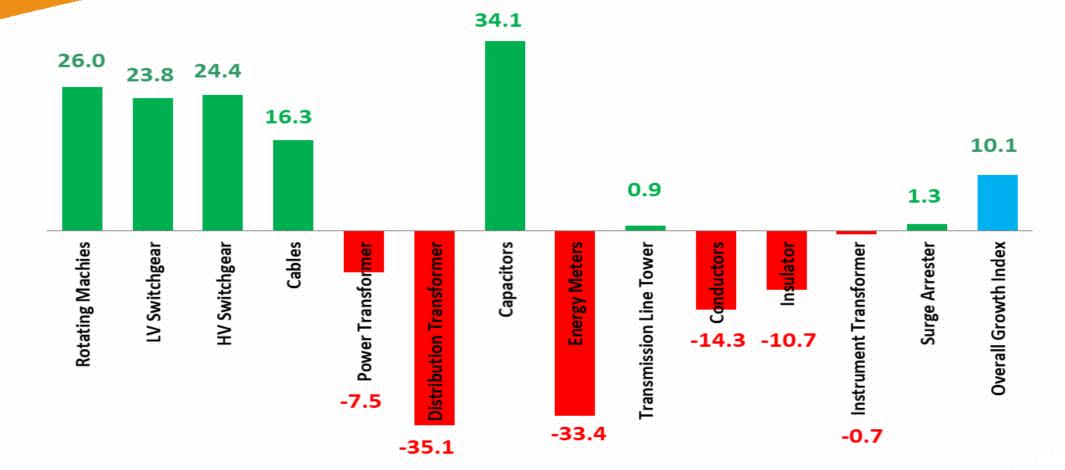
Sector wise break-up of % Growth Index Apr 21 – Feb 22 over Apr 20 – Feb 21



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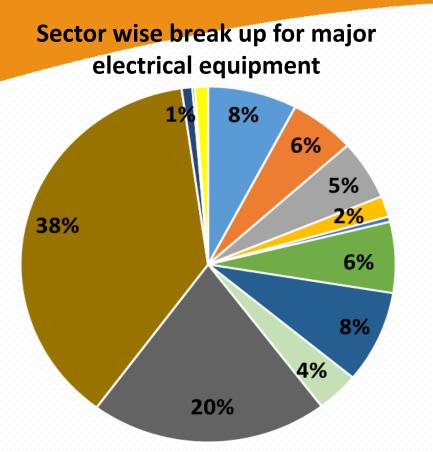
LV products like LV Switchgear, LT Capacitors, LV Cables, LT Motors showing high growth MV-HV GIS are in high demand for new sub-stations

Growth Index for Electrical Equipment industry Apr 21 – Mar 22 compared with Apr 19 – Mar 20 (Pre-covid normal period)



- Overall electrical industry shown growth of 10.1% compared to pre-pandemic normal period level mainly due to Rotating Machines and LV and HV Switchgear, Cable whose demand is driven due to growth in industrial and commercial sector
- But the other product still on decline trend due to lack of order finalizations





Rotating Machines

- Energy Meters
- Transmission Line Towers
- Power Cables
- Insulators

FY2021-2022

Overall domestic Power Equipment production excl. Services and other allied business is estimated at Rs. 2.25 Lac crs / USD 30 bn (Growth of 34% over last year FY20-21)

Rs. Growth is double than volume/quantity growth due to surge in raw material/component prices

- Share in Capital Goods Approx. 45%
- Share in Manufacturing sector at current prices 6.8%
- $\circ~$ Share in GVA at current prices 1.05%
- Share in GDP at current prices 0.95%
- Distribution Transformers
 - Capacitors
 - HV Switchgear
 - Instrument Transformers

- Power Transformers
- Conductors
- LV Switchgear
- Surge Arretsters



Detailed Growth Index for Electrical Equipment Industry

	Apr 21 - Mar 22	Apr 21 - Mar 22		
Product Category	compared to	compared to		
	Apr 20 - Mar 21	Apr 19 - Mar 20		
L.T. Motors	32.5	31.0		
FHP Motors	20.6	46.5		
H.T. Motors	0.9	-4.6		
D.C. Machine	17.3	3.0		
Rotating Machines	24.0	26.0		
Power Cables: LV	33.4	18.6		
Power Cables: MV+HV	31.6	7.3		
Control Cables & other				
Special Purpose Cables	6.1	-3.0		
PVC Cable - IS-694	17.4	25.6		
Cable	21.4	16.3		
Distribution Transformer	-4.9	-35.1		
Power Transformer	-4.4	-7.5		
Transformer	-4.7	-21.5		
Single phase	3.9	-39.0		
Poly phase	24.3	-22.5		
Meter	10.9	-33.4		
Conductors	-1.3	-14.3		
Transmission Line Towers	0.9	0.9		
Tramsmission Lines	-0.1	-5.7		
HT Capacitor	-0.3	-22.3		
LT Capacitor	48.0	53.7		
Capacitor	35.6	34.1		

aex for Electri	cal Equipme	nt industry	
	Apr 21 - Mar 22	Apr 21 - Mar 22	
Product CATEGORY	compared to Apr 20 - Mar 21	compared to Apr 19 - Mar 20	Overall Electrical
HT Circuit Breakers - AIS	18.3	10.0	Equipment Industry
MV_HV GIS	116.4	47.6	Growth Index
RMU	1.7	2.1	
HV SWGR	56.1	24.4	
Power Contactors	23.0	15.4	
АСВ	26.6	34.7	Apr 21 - Mar 22
МССВ	27.1	18.7	compared to Apr 20 - Mar 21
RCD MCB SDF	29.0 24.9 26.2	29.8 24.2 3.6	17.1 Apr 21 - Mar 22
LVSWGR	25.7	23.8	compared to
Switchgear	30.4	23.9	Apr 19 - Mar 20
Current Transformer	11.0	2.0	(Pre-Covid normal perio
Voltage Transformer	14.6	-7.7	40.4
Instrument Transformer	12.0	-0.7	10.1
Polymer	12.6	18.3	
Porcelain	14.5	-50.9	
Surge Arrester	13.1	1.3	122M
Porcelain	-5.6	-17.9	your link to electric
Composite	-27.1	8.6	your thit to creet it
Insulator	-11.5	-10.7	

Mar 22 red to Mar 21 - Mar 22 pared to - Mar 20 normal period) 0.1

Industry

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Quarterly % Growth Index for Electrical Equipment Industry

Comparison with same Quarter of previous year				Comparison with previous Quarter (Q-O-Q)				
Product	Apr 21 - Jun 21 compared to Apr 20 - Jun 20	Jul 21 - Sep 21 compared to Jul 20 - Sep 20	Oct 21 - Dec 21 compared to Oct 20 - Dec 20	Jan 22 - Mar 22 compared to Jan 21 - Mar 21	Jul 21 - Sep 21 compared to Apr 21 - Jun 21	Oct 21 - Dec 21 compared to Jul 21 - Sep 21	Jan 22 - Mar 22 compared to Oct 21 - Dec 21	Growth continues started from last Qtr of previous year FY21
Rotating Machines	177.5	37.7	12.1	-13.3	0.2	0.0	0.0	
LV Switchgear	134.1	27.8	0.4	7.7	7.2	-8.4	24 <mark>.</mark> 8	In 4 th Qtr., growth in LV
HV Switchgear	100.4	119.5	57.0	47.6	57.5	32.9	-8.0	
Cables	8.9	24.0	30.6	25.7	17.1	9.8	25.1	compared with last
Power Transformers	63.7	-5.3	-15.8	-7.1	0.1	0.2	0.4	year same quarter
Dist Transformers	23.3	-2.4	-5.5	-14.3	0.5	0.0	0.0	Motors, TRF,
Transformers	43.1	-3.8	-10.6	-10.8	0.3	0.1	0.2	Transmission Line
Capacitors	60.1	65.1	-2.5	43.8	52.8	-21.3	63.2	Towers decline in last
Energy Meters	99.3	17.8	-13.9	-2.1	22.4	-0.3	2.2	quarter
Transmission Lines	31.2	-3.0	-3.6	-7.1	26.7	10.2	-3.7	
Conductors	23.5	-3.3	0.8	-15.6	9.6	-4.6	11.8	
Insulators	19.9	28.6	-14.2	-13.1	41.3	26.6	31.9	10000
Electrical Equipment Industry Growth Index	60.5	22.4	12.5	9.8	14.5	3.9	15.6	your link to electricity

Import and Export data

Source: DGCIS

ITC codes	Product Groups	April - Mar FY 2021-22		April - Mar FY 2020-21		April - Mar FY 2019-20		Domestic Growth %	Domestic Growth %
		Import	Export	Import	Export	Import	Export	Mar 22 over	Mar 22 over
		Value in Rs. Crores		% Variation		% Variation		Mar 21	Mar 20
8501 excl.	Motors & AC								
850110 & 20	Generators	5549	3567	44	26	32	21	24.0	26.0
850423	Power TRF	260	1234	52	65	-6	33	-4.4	-7.5
850421-22, 850433-34	Distribution TRF	574	1590	47	22	-1	30	-4.9	-35.1
853210	Capacitors	259	364	34	25	70	60	35.6	34.1
8535, 853720	HV SWGR incl. Panels	1499	2332	13	4	-5	9	56.1	24.4
8536, 853710	LT Switchgears incl Panels #	12768	8303	33	0	34	5	25.7	23.8
854442/49/60	Cables - LV & HV	1429	4468	38	43	34	7	21.4	16.3
902830	Energy Meters	26	342	13	22	-30	-7	10.9	-33.4
73082011/19	Tr. Line Towers	18	2375	-5	-9	-33	-4	0.9	0.9
7604 & 7614	Conductors	732	3293	54	35	44	33	-1.3	-14.3

• Though overall Exports have increased by 25%, Imports have also surged by 28%

• China still accounts for 37% share in Imports; followed by Germany and Japan

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