



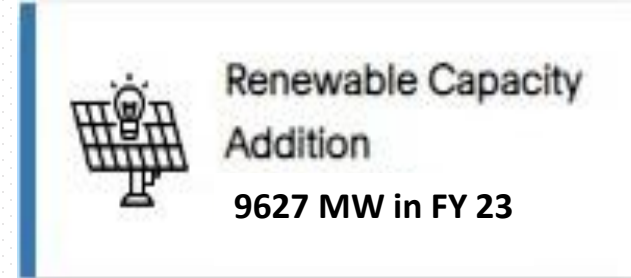
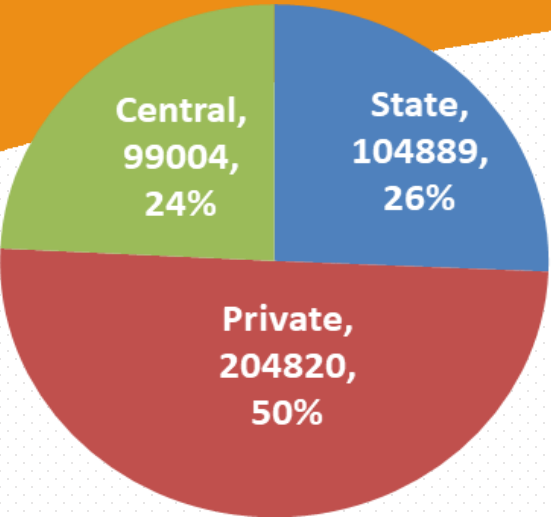
Status - Indian Electrical Industry

April to Sept

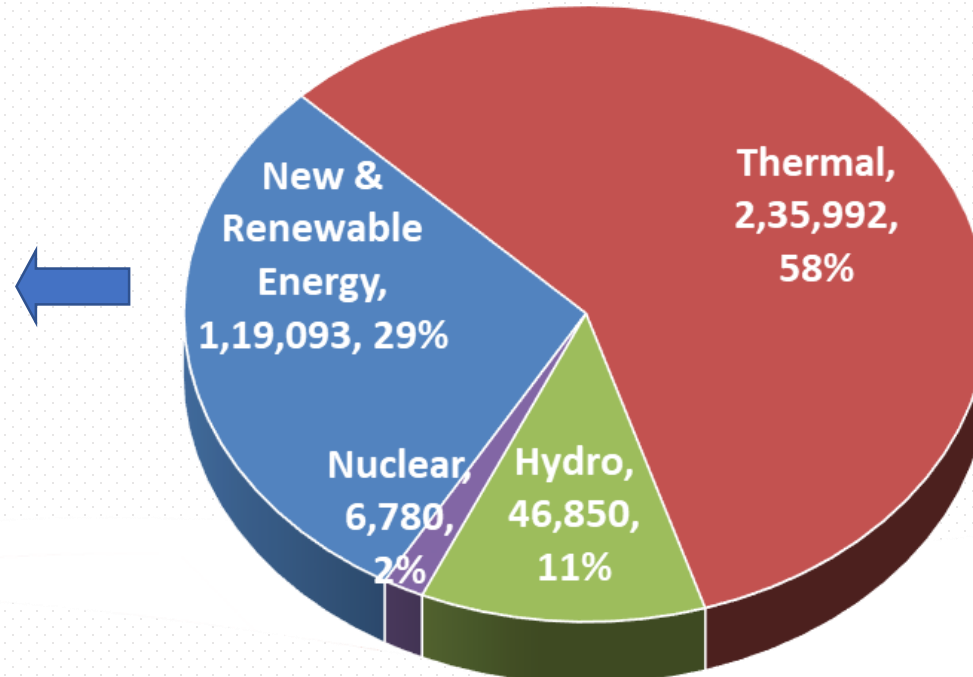
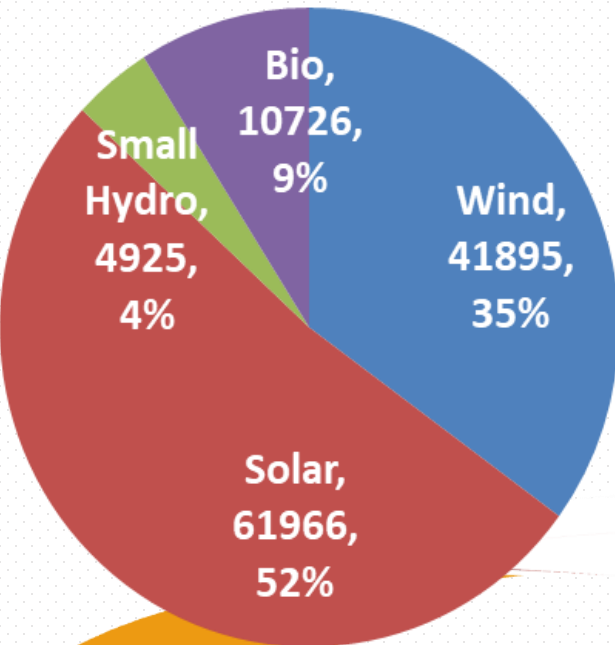
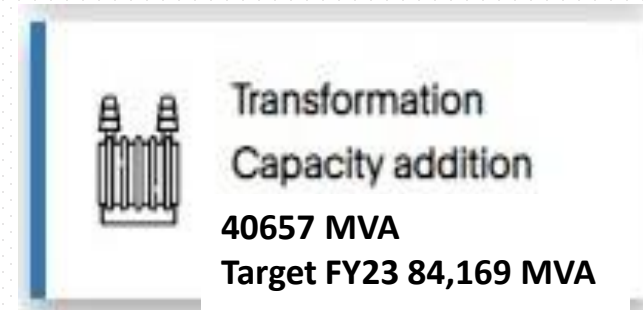
2022-2023

Indian Power sector till Oct 22

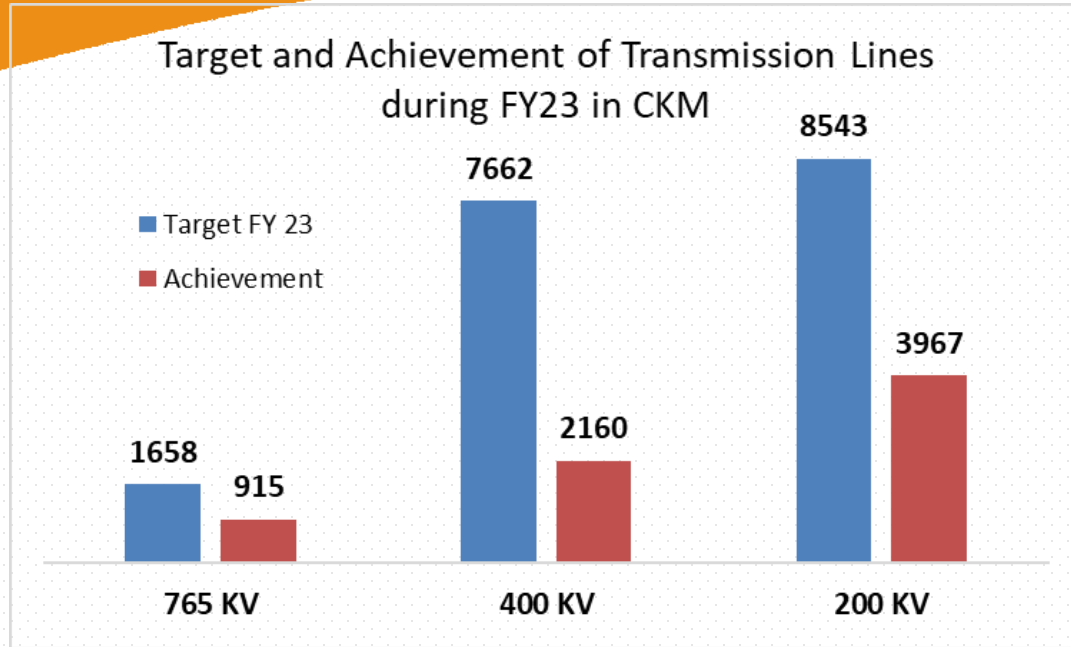
Installed Generation Capacity as on 31st Oct 2022 is 4,08,715 MW



Status of Power Generation till Oct 2022

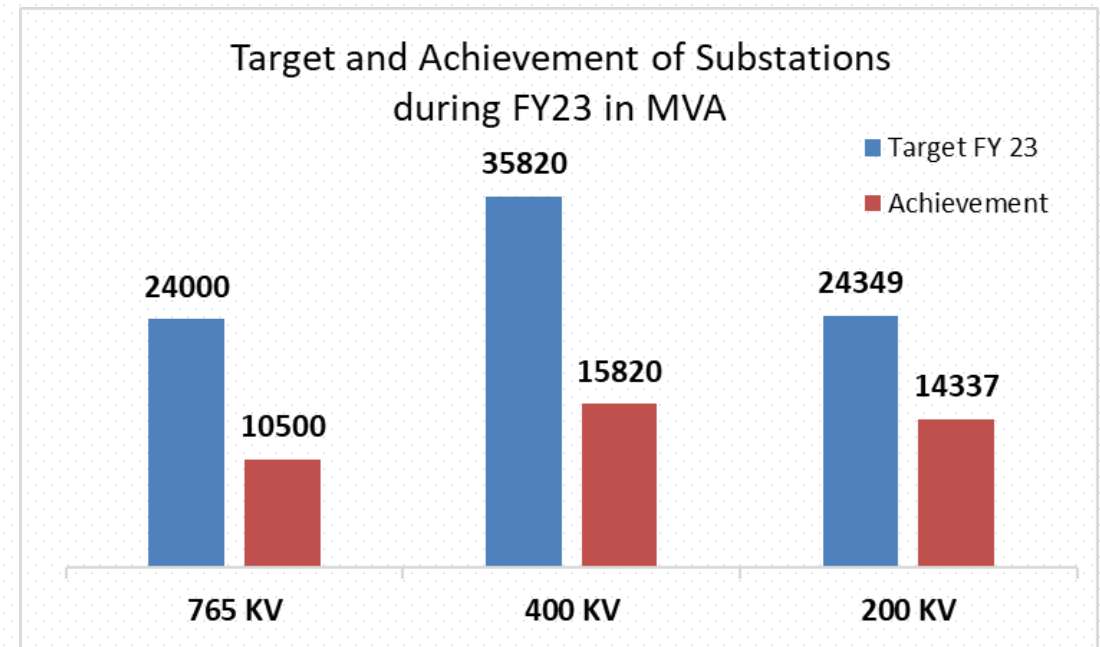


Indian Power sector till Oct 22



Transmission Lines:

7042 CKM achieved up to Oct 22 against annual target of 17,863 CKM of FY23 (39%)



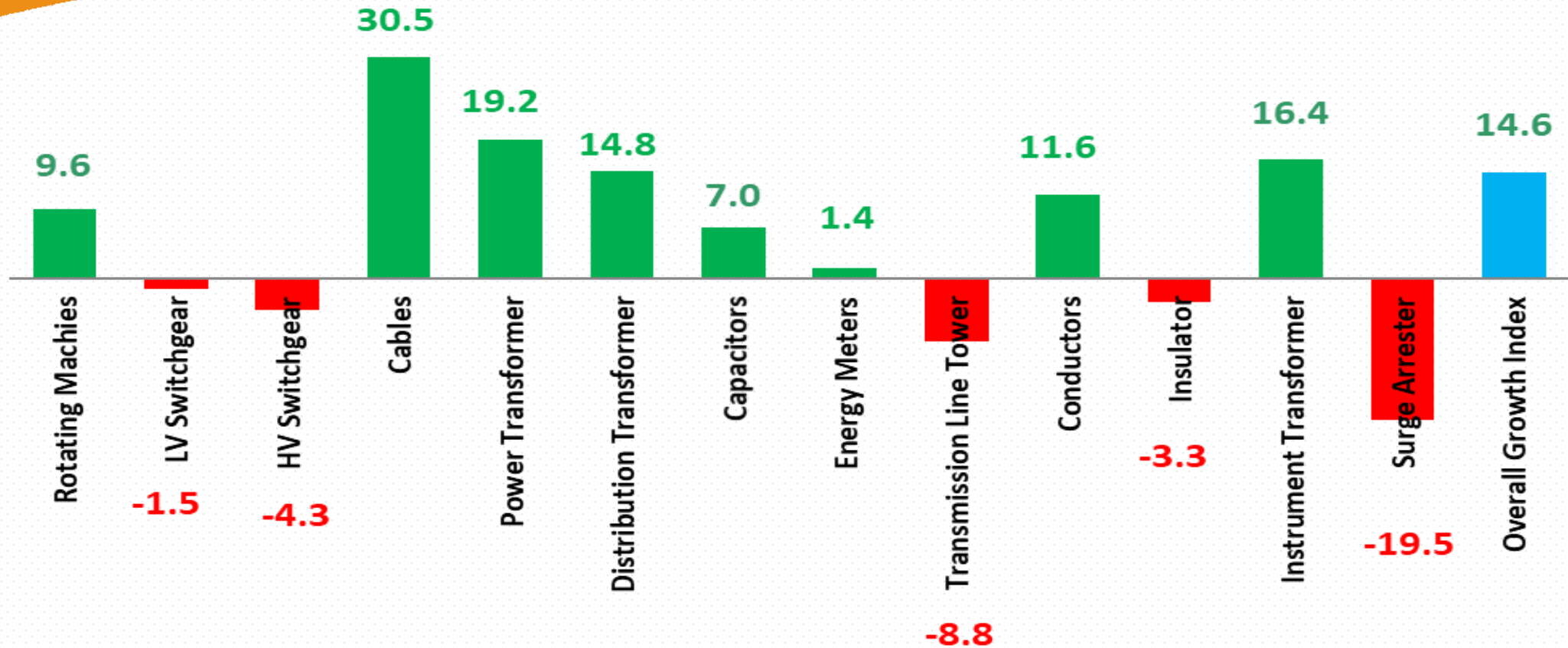
Transformation Capacity (Sub-Stations):

40,657 MVA achieved up to Oct 22 against annual target of 84,169 MVA of FY23 (48%)

Focus is on 765 KV and 400 KV completion of Transmission Line and Transformation Capacity thru Sub-Stations

Growth Index for Electrical Equipment industry

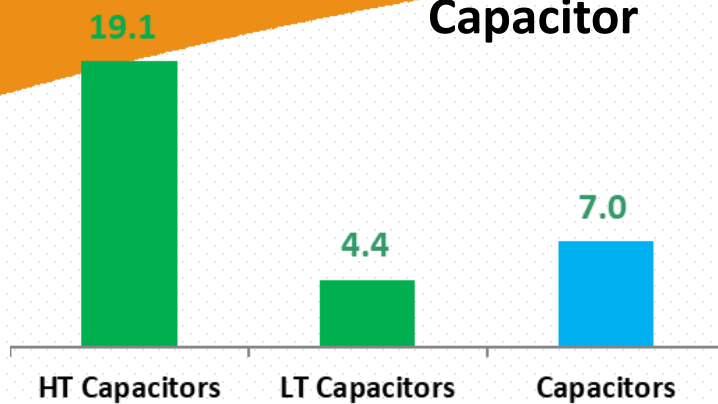
Apr 2022 – Sep 2022 compared with Apr 2021 – Sep 2021



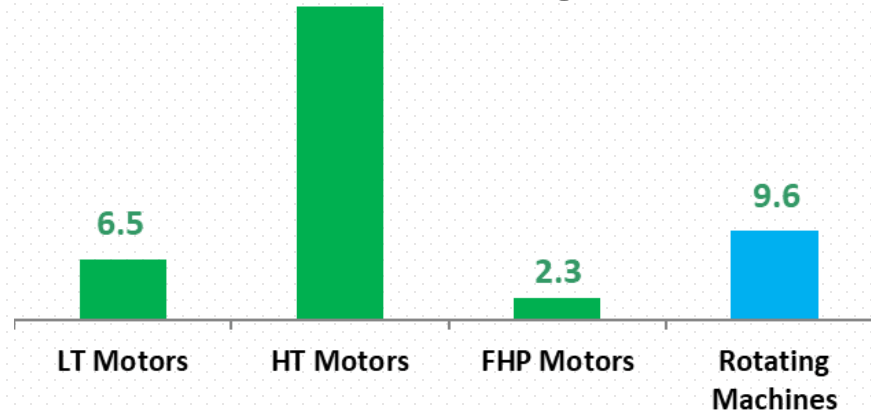
High growth sectors - Cables (supported by EXPORT)
Moderate growth – Conductor, Capacitors, DT, PT, Motors
Declining Sectors – TLT, LV SWGR, HV SWGR (GIS)

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

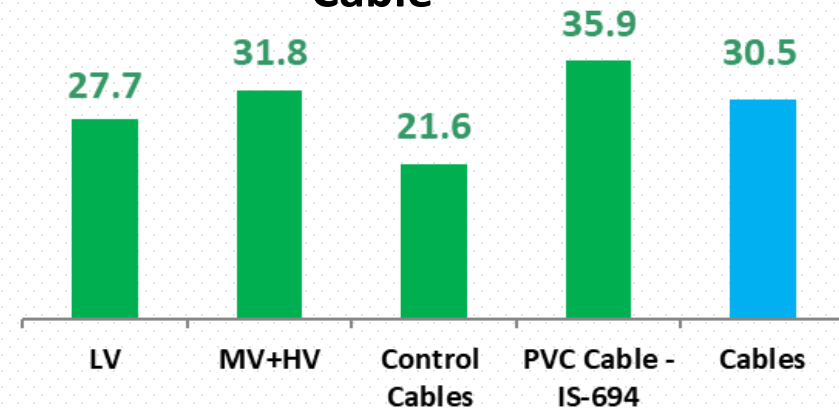
Capacitor



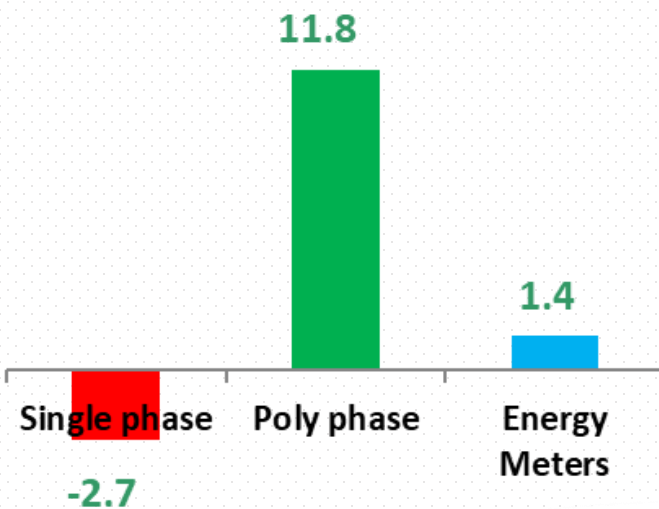
Rotating Machines



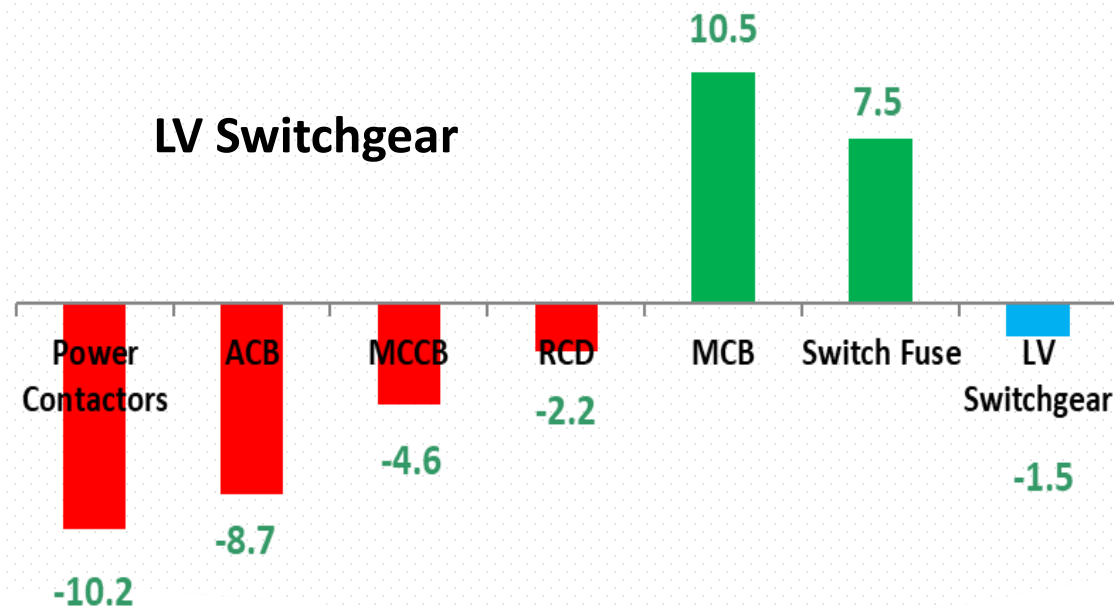
Cable



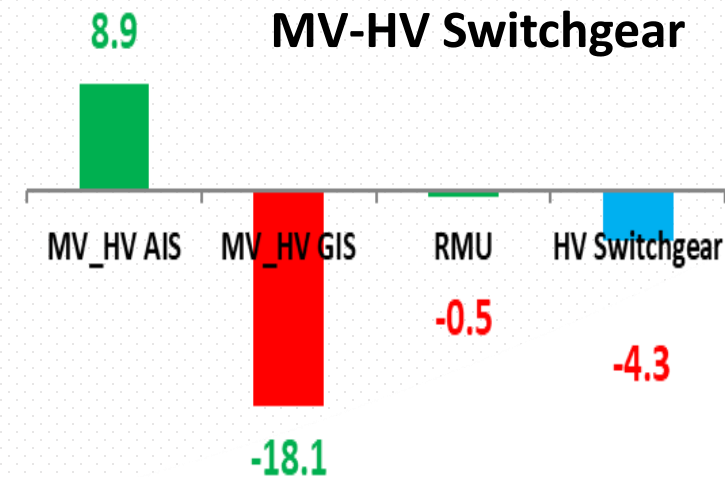
Energy Meters



LV Switchgear



MV-HV Switchgear



Energy Meters - increase for Smart Meters

Detailed Growth Index for Electrical Equipment Industry

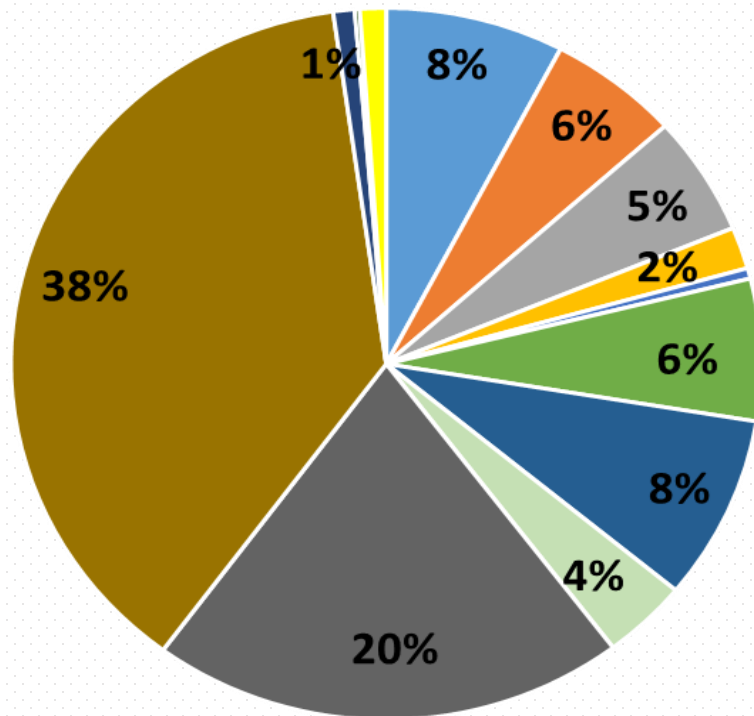
Product Category	Apr - Sep 22 compared to Apr - Sep 21	Product Category	Apr - Sep 22 compared to Apr - Sep 21
L.T. Motors	6.5	HT Circuit Breakers - AIS	8.9
FHP Motors	2.3	MV_HV GIS	-18.1
H.T. Motors	33.6	RMU	-0.5
D.C. Machine	32.8	HV SWGR	-4.3
Rotating Machines	9.6	Power Contactors	-10.2
Power Cables: LV	27.7	ACB	-8.7
Power Cables: MV+HV	31.8	MCCB	-4.6
Control Cables & other Special Purpose Cables	21.6	RCD	-2.2
PVC Cable - IS-694	35.9	MCB	10.5
Cable	30.5	SDF	7.5
Distribution Transformer	14.8	LVSWGR	-1.5
Power Transformer	19.2	Switchgear	-1.9
Transformer	17.0	Current Transformer	13.1
Single phase	-2.7	Voltage Transformer	24.7
Poly phase	11.8	Instrument Transformer	16.4
Meter	1.4	Polymer	-14.1
Conductors	11.6	Porcelain	-32.8
Transmission Line Towers	-8.8	Surge Arrester	-19.5
Transmission Lines	0.7	Porcelain	9.6
HT Capacitor	19.1	Composite	-36.1
LT Capacitor	4.4	Insulator	-3.3
Capacitor	7.0		

Overall Electrical Equipment Industry Growth Index



Apr - Sep 22 compared to Apr - Sep 21
14.6

Sector wise break up for major electrical equipment



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%
- Share in GVA at current prices – 1.05%
- Share in GDP at current prices – 0.95%



Quarterly % Growth Index for Electrical Equipment Industry

Comparison with same Quarter of previous year

Product	Q1 FY 22 compared to Q1 FY 21	Q2 FY 22 compared to Q2 FY 21	Q3 FY 22 compared to Q3 FY 21	Q4 FY 22 compared to Q4 FY 21	Q1 FY 23 compared to Q1 FY 22	Q2 FY 23 compared to Q2 FY 22
Rotating Machines	177.5	37.7	12.1	-13.3	29.6	-6.0
LV Switchgear	134.1	27.8	0.4	7.7	2.3	-5.0
HV Switchgear	100.4	119.5	57.0	47.6	10.0	-8.5
Cables	8.9	24.0	30.6	25.7	54.5	14.9
Power Transformers	63.7	-5.3	-15.8	-7.1	22.9	37.7
Dist Transformers	23.3	-2.4	-5.5	-14.3	29.4	7.6
Capacitors	60.1	65.1	-2.5	43.8	26.2	-6.1
Energy Meters	99.3	17.8	-13.9	-2.1	-12.5	12.7
Transmission Lines	31.2	-3.0	-3.6	-7.1	-10.0	-7.7
Conductors	23.5	-3.3	0.8	-15.6	-10.0	30.1
Insulators	19.9	28.6	-14.2	-13.1	9.1	-0.7
Electrical Equipment Industry Growth Index	60.5	22.4	12.5	9.8	26.5	8.5

in Q2, good growth for Conductors, Power Transformers and Energy Meters
Rotating Machines shown decline

Import and Export data

Source: DGCIS

ITC codes	Product Groups	April - Sep FY 2022-23		April - Sep FY 2021-22		Domestic % Growth Sep 22 over Sep 21
		Import	Export	Import	Export	
		Value in Rs. Crores		% Variation		
8501 excl. 850110 & 20	Motors & AC Generators	3548	2082	54	17	9.6
850423	Power TRF	147	479	11	-19	19.2
850421-22, 850433-34	Distribution TRF	315	1139	73	64	14.8
853210	Capacitors	387	163	384	-5	7.0
8535, 853720	HV SWGR incl. Panels	627	1321	-9	21	(-) 4.3
8536, 853710	LT Switchgears incl Panels #	7876	5892	30	18	(-) 1.5
854442/49/60	Cables - LV & HV	752	3233	19	69	30.5
902830	Energy Meters	11	126	-21	-38	1.4
73082011/19	Tr. Line Towers	25	2075	317	132	(-) 8.8
7604 & 7614	Conductors	417	2283	20	52	44.3

- Import – top countries - China (37%), Germany, Japan
- Export – top countries - USA, Bangladesh, Germany

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