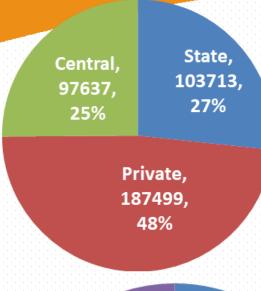
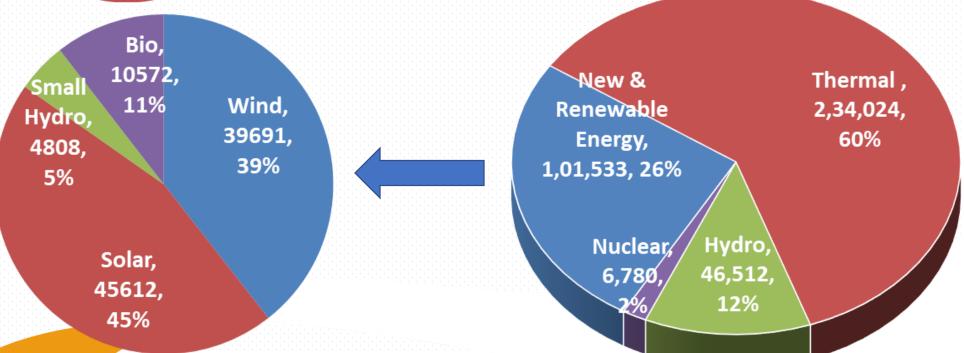


# **Status of Power Generation till September 2021**



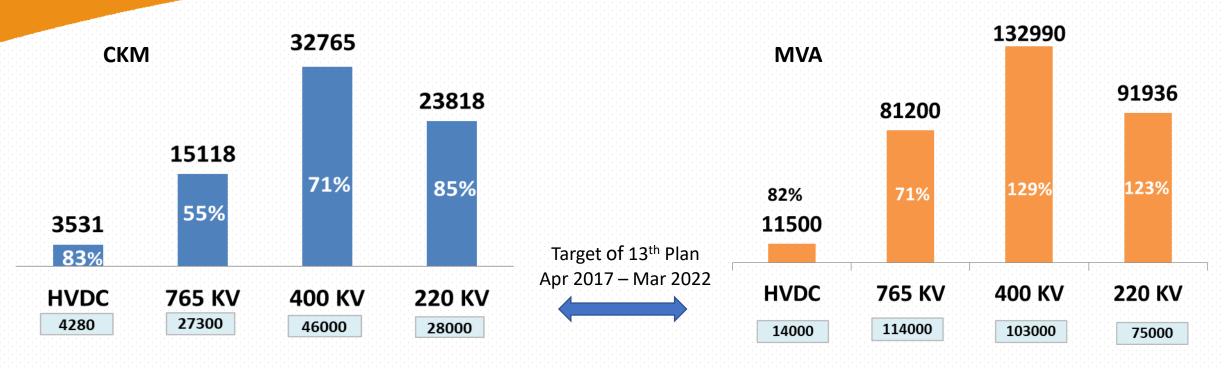
Installed Generation Capacity as on 30<sup>th</sup> Sep 21 is 3,88,849 MW 7,000 MW Capacity Addition in Apr – Sep 21 from RE

- ➤ Govt. in December 2021 announced achieving 40% share of Renewables incl. Hydro in overall Generation Capacity
- ➤ RE Generation is expected to take faster pace (to install over 15 GW per year) due to various policy measures to achieve over 200 GW by Dec. 2022





# Status of Transmission & Substation Achievement during April 2017 to September 2021



#### **Transmission Lines:**

6,586 CKM achieved up to Sep'21 against annual target of 19,255 CKM of FY22 (34%)

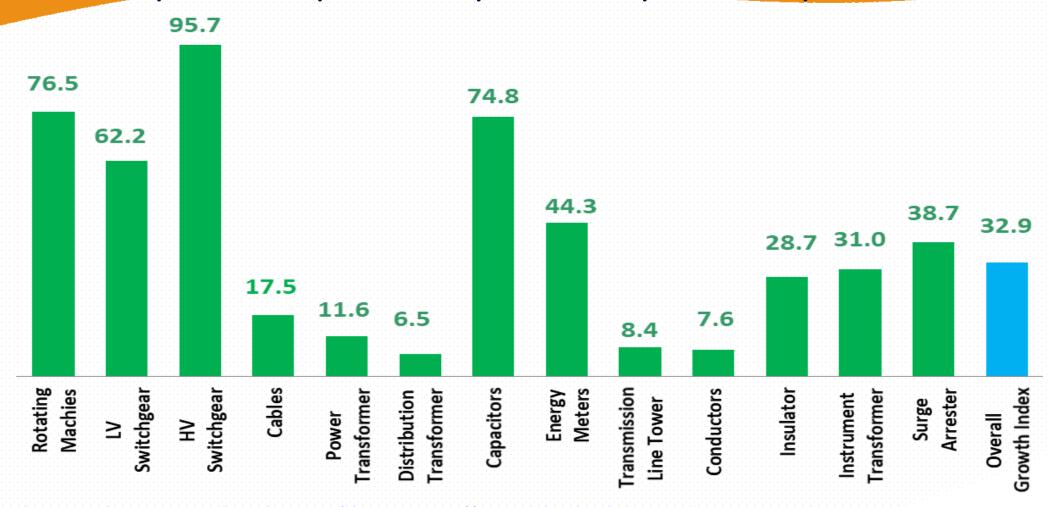
#### **Transformation Capacity (Sub-Stations):**

33,923 MVA achieved up to Sep'21 against annual target of 81,545 MVA of FY22 (42%)

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 – Sep 2021 compared with Apr 2020 – Sep 2020**

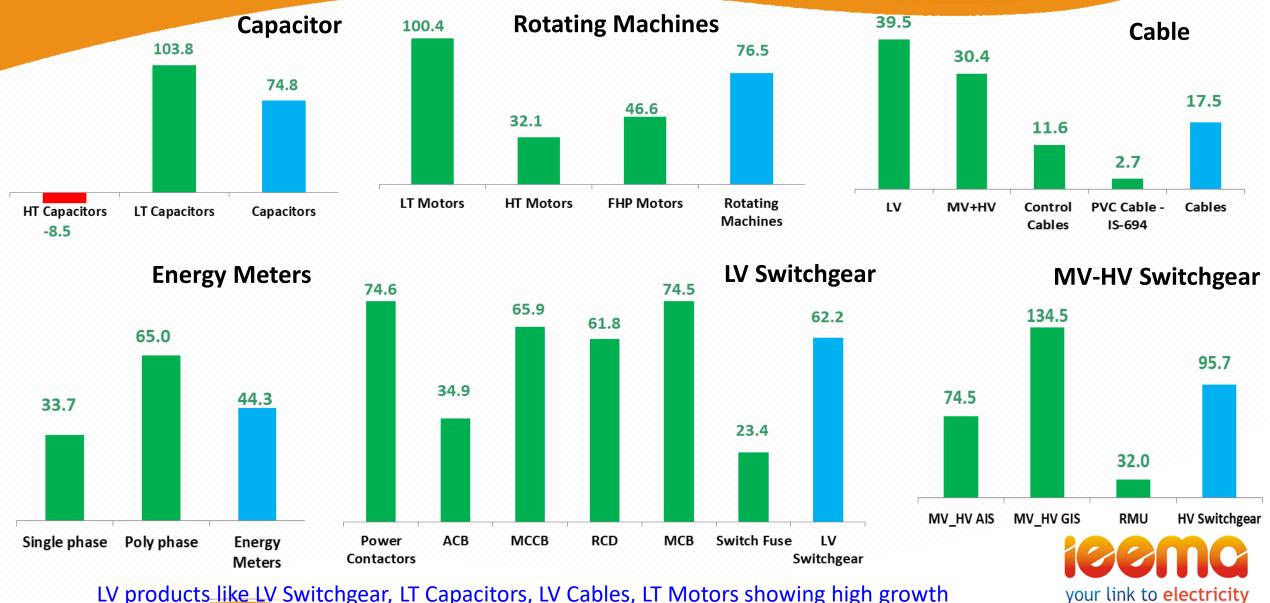


 A high growth is over a low base of last year affected by lockdown due to pandemic However, Leading Economic indicators like GDP, IIP are also confirming pick up in power and industrial sector



The high growth is due to support of growth in Exports in almost all segments

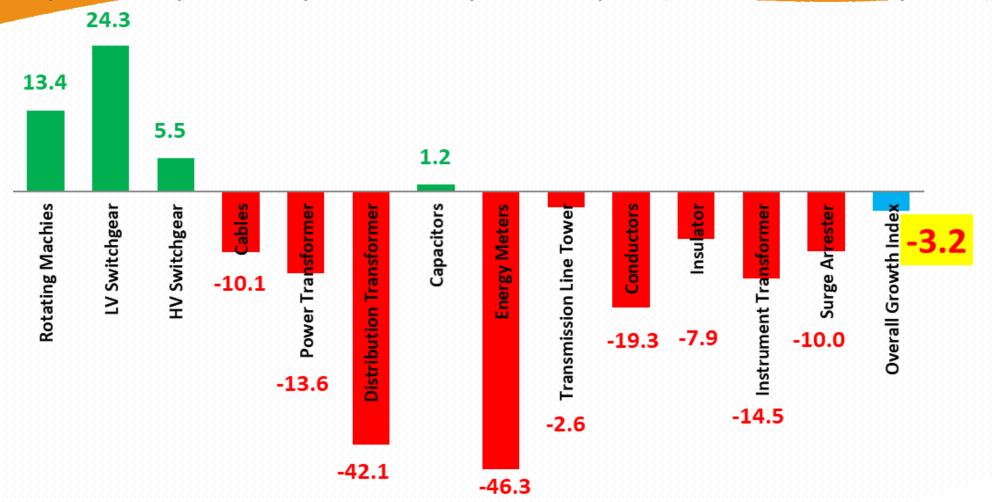
### Sector wise break-up of % Growth Index Apr 21 – Sep 21 over Apr 20 – Sep 20



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**

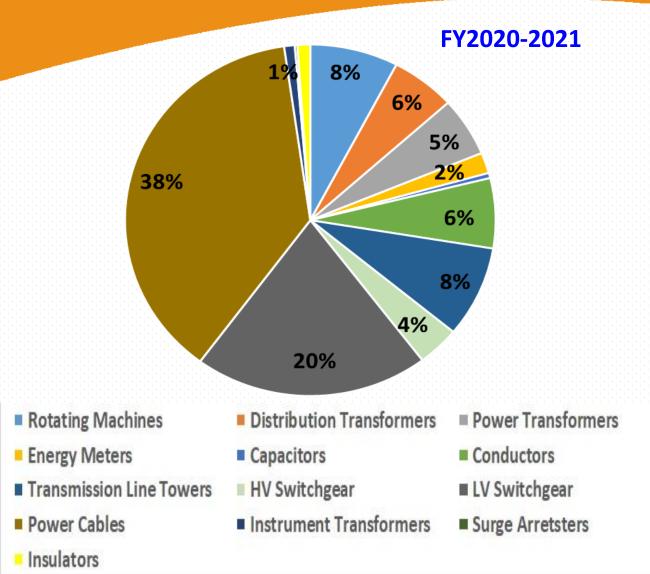
Apr 21 – Sep 21 compared with Apr 19 – Sep 19 (Pre-covid normal period)



- Electrical Industry growth however is still not achieved pre-pandemic normal period level in almost all sectors except Rotating Machines and LV Switchgear; whose demand is driven due to growth in industrial and commercial sector
- Note that in pre-pandemic normal period of HY FY20, industry was already declined by 28% over
   HY FY19



#### Sector wise break up for major electrical equipment of products



Product	Industry size in Rs. Cr. For FY 20	Industry size in Rs. Cr. For FY 21		
Rotating Machines	5933	8719		
<b>Distribution Transformers</b>	7967	6395		
Power Transformers	6159	6143		
Energy Meters	3573	2151		
Capacitors	552	539		
Conductors	9300	7300		
Transmission Line Towers	9200	9504		
HV Switchgear	4169	4187		
LV Switchgear	24853	23196		
Power Cables	47679	42588		
Instrument Transformers	1262	1043		
Surge Arretsters	230	251		
Insulators	1424	1273		



All sectors except Rotating Machines and Transmission Line Towers have seen increase in industry size. Increase in raw material prices to some extent have helped top line increase

#### **Detailed Growth Index for Electrical Equipment Industry**

Product Category	Apr 21 - Sep 21 compared to Apr 20 - Sep 20	Apr 21 - Sep 21 compared to Apr 19 - Sep 19				
L.T. Motors	100.4	16.5				
FHP Motors	46.6	37.5				
H.T. Motors	32.1	-11.4				
D.C. Machine	26.5	-28.0				
<b>Rotating Machines</b>	76.5	13.4				
Power Cables: LV	39.5	-19.7				
Power Cables: MV+HV	30.4	-13.7				
Control Cables & other Special Purpose Cables	11.6	-26.4				
PVC Cable - IS-694	2.7	3.8				
Cable	17.5	-10.1				
<b>Distribution Transformer</b>	6.5	-42.1				
Power Transformer	11.6	-13.6				
Transformer	9.0	-28.1				
Single phase	33.7	-50.4				
Poly phase	65.0	-38.3				
Meter	44.3	-46.3				
Conductors	7.6	-19.3				
<b>Transmission Line Towers</b>	8.4	-2.6				
Tramsmission Lines	8.0	-9.9				
HT Capacitor	-8.5	-36.1				
LT Capacitor	103.8	14.2				
Capacitor	74.8	1.2				

Product CATEGORY	Apr 21 - Sep 21 compared to Apr 20 - Sep 20	Apr 21 - Sep 21 compared to Apr 19 - Sep 19 -10.8		
HT Circuit Breakers - AIS	74.5			
MV_HV GIS	134.5	28.2		
RMU	32.0	1.5		
HV SWGR	95.7	5.5		
Power Contactors	74.6	24.3 23.5 33.0 42.9 15.6		
ACB	34.9			
MCCB	65.9			
RCD	61.8			
MCB	74.5			
SDF	23.4	-13.8		
LVSWGR	62.2	24.3		
Switchgear	67.3	21.4		
<b>Current Transformer</b>	27.9	-8.4		
Voltage Transformer	39.0	-30.4		
<b>Instrument Transformer</b>	31.0	-14.5		
Polymer	31.8	3.9		
Porcelain	59.7	-52.4		
Surge Arrester	38.7	-10.0		
Porcelain	43.8	-30.2		
Composite	-11.6	51.5		
Insulator	28.7	-7.9		

Overall Electrical Equipment Industry Growth Index



Apr 21 - Sep 21 compared to Apr 20 - Sep 20

32.9

Apr 21 - Sep 21 compared to Apr 19 - Sep 19 (Pre-Covid normal period

(-) 3.2



### **Quarterly % Growth Index for Electrical Equipment Industry**

Comparison with same Quarter of previous year

Comparison with previous Quarter (Q-O-Q)

	Apr 21 - Jun 21	Jul 21 - Sep 21	Jul 21 - Sep 21
Product	compared to	compared to	compared to
	Apr 20 - Jun 20	Jul 20 - Sep 20	Apr 21 - Jun 21
Rotating Machines	177.5	37.7	0.2
LV Switchgear	134.1	27.8	7.2
HV Switchgear	100.4	119.5	57.5
Cables	8.9	24.0	17.1
Power Transformers	63.7	-5.3	0.1
Dist Transformers	23.3	-2.4	0.5
Transformers	43.1	-3.8	0.3
Capacitors	51.0	94.8	61.6
<b>Energy Meters</b>	99.3	17.8	22.4
Transmission Lines	31.2	-3.0	26.7
Conductors	23.5	-3.3	9.6
Insulators	19.9	28.6	41.3
Electrical Equipment Industry Growth Index	60.5	22.4	14.5

- Growth continues started from last Qtr of previous year FY21
- In 2<sup>nd</sup> Qtr., growth in almost all segments except Transformers, Transmission Line Towers and Conductors over Q2 of previous yr
- Also, all segments showing growth in Q-O-Q comparison



#### **Import and Export Data for the period Apr 21 – Sep 21**

ITC codes	Product Groups	April FY 202	•	April FY 20	- Sep 20-21	•	- Sep 19-20	Domestic Growth %	Domestic Growth %
ire codes		Import	Export	Import	Export	Import	Export	Sep 21 over	Sep 21 over
		Value in F	Rs. Crores	% Var	iation	% Variation		Sep 20	Sep 19
8501 excl.	Motors & AC								
850110 & 20	Generators	2297	1783	60	43	3	15	76.5	13.4
850423	Transformer	133	589	375	78	27	23	11.6	(-) 13.6
850421-22,	Distribution								
850433-34	Transformer	182	694	82	23	3	16	6.5	(-) 42.1
853210	Capacitors	80	171	-11	43	-6	54	74.8	1.2
	HV Switchgear incl.								
8535, 853720	Panels	692	1090	31	1	-17	-3	95.7	5.5
	LT Switchgear incl								
8536, 853710	Panels	6050	5006	68	38	25	27	62.2	24.3
854442/49/60	Cables - LV & HV	633	1917	45	30	14	13	17.5	(-) 10.1
902830	Energy Meters	14	202	40	143	40	3	44.3	(-) 46.3
73082011/19	Tr. Line Towers	6	894	-40	-21	-40	-17	8.4	(-) 2.6
7604 & 7614	Conductors	348	1505	96	30	29	26	7.6	(-) 19.3

Though overall Exports have increased by 30%, Imports have also surged by 46%

• China still accounts for 36% share in Imports; grown by 50% followed by Germany (9% share & 46% increase) and Japan (7% share & 88% increase)



Source: DGCIS

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