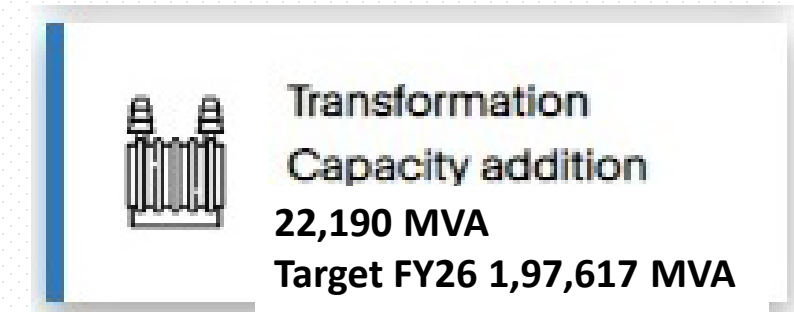
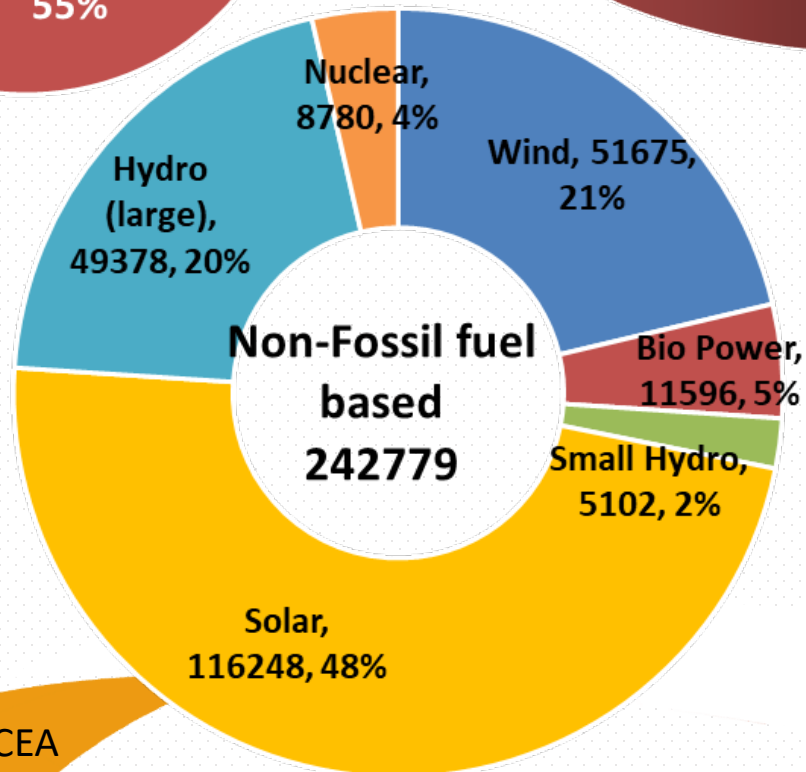
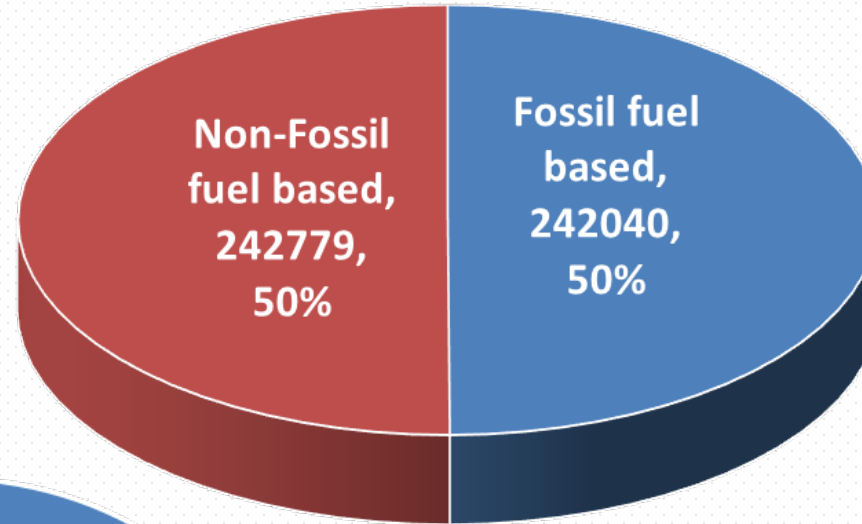
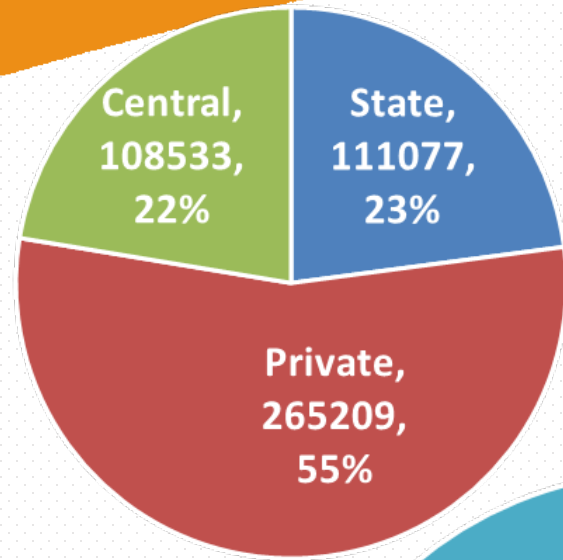




Status - Indian Electrical Industry April to June 2025

Indian Power sector till June 2025

Installed Generation Capacity as on 31 Jun 2025 is 4,84,819 MW



13,908 MW generation capacity added in Apr – Jun 25, 89% is Non-Fossil fuel based

Indian Power sector – Target for FY 26

As on 31.03.2025	Target for FY 2025-26
Installed Power Generation Capacity: Fossil fuel based: 2,46,935MW Non-Fossil fuel based: 2,28,271MW	Installed Power Generation Capacity: Conventional: 12,860MW
AC Transmission Lines: 4,94,374ckm HVDC : 19,375 ckm 765 KV : 56,955ckm 400 KV : 2,06,792ckm 220 KV : 2,11,252ckm	AC Transmission Lines: 24,400ckm HVDC : NIL 765 KV : 12,865ckm 400 KV : 5,933ckm 220 KV : 5,602ckm
AC Substation Transformation Capacity: 12,47,488 MVA HVDC: 32,500 MW 765 KV : 2,99,819 MVA 400 KV : 4,72,376 MVA 220 KV : 4,75,293MVA	AC Substation Transformation Capacity: 1,97,617MVA HVDC : NIL 765 KV : 1,03,000MVA 400 KV : 62,150MVA 220 KV : 32,467MVA

For FY 26, more focus on the 765 and 400 KV

Summary of Under Construction Transmission Projects as on Sep 25 (Awarded through Tariff Based Competitive Bidding Route)

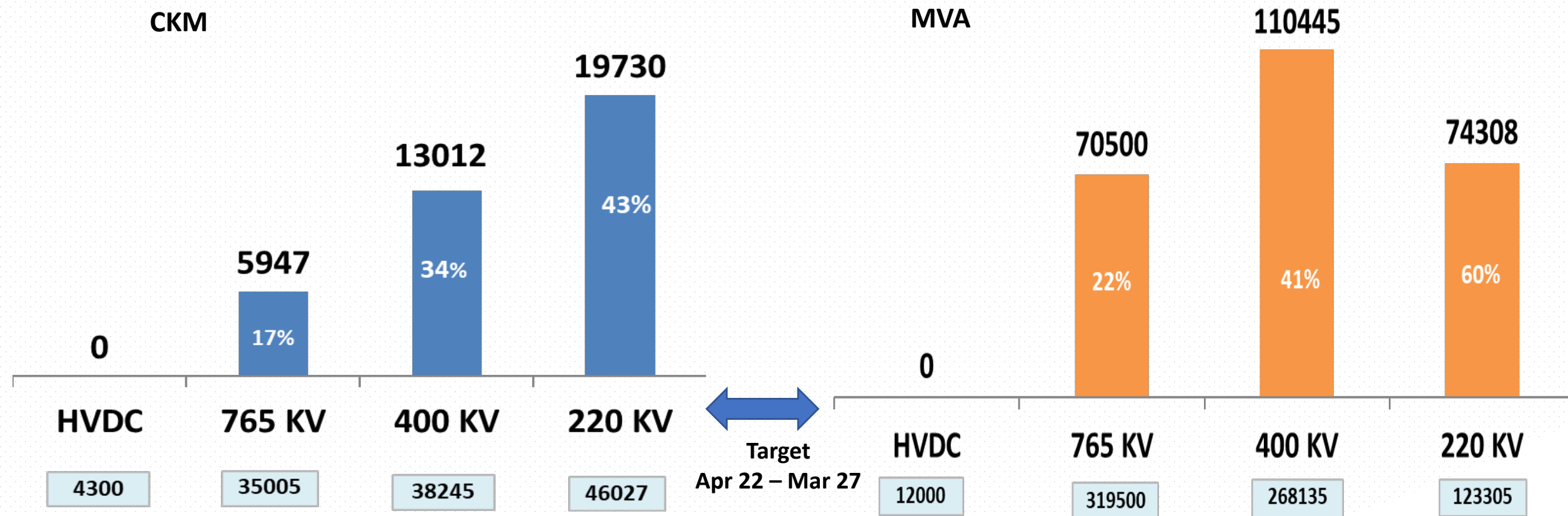
Transmission Utility	Transmission Line (ckm)	Transformation Capacity (MVA)	Cost (Rs. Cr.)
PGCIL	20209	189600	1,23,977
Private TSPs	14865	128800	99,314
Total	35074	318400	2,23,291

Year	Transmission Line (ckm)	Transformation Capacity (MVA)	Cost (Rs. Cr.)
FY 25-26	9475	76400	37,632
FY 26-27	19591	182000	1,16,282
FY 27-28	2218	31500	21,056
FY 28-29	2788	12000	825
FY 29-30	1002	16500	47,496
Total	35074	18400	2,23,291

Some major investments and developments in the Indian power sector are as follows :

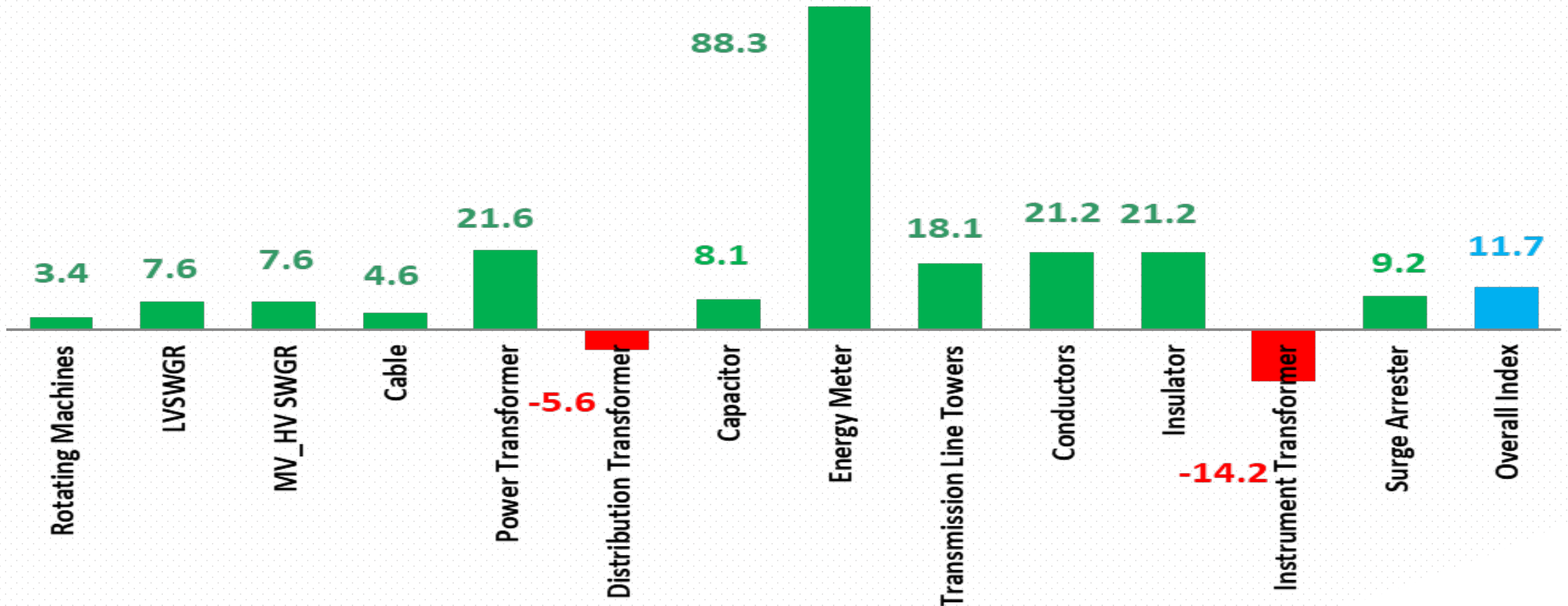
Investment in power sector	USD 500 bn investment planned till 2032 incl. T&D Investment of USD 100 bn by 2027 Currently, around USD 200 bn investment in pipeline on various G, T&D Projects
Thermal power sector	set to attract Rs. 2,30,000 crore (US\$ 26.71 billion) in investments by 2027-28, with private players contributing around one-third, supporting the addition of 80 GW capacity by 2031-32 and ensuring stable base load energy alongside renewable growth
Energy storage sector	to attract an investment of Rs. 4,79,000 crore (US\$ 56.07 billion) by 2032, as per the India Energy Storage Alliance (IESA)
Green hydrogen startups, New and Renewable Energy	announced a INR 100 crore scheme to support with financial assistance up to INR 5 crore per project for innovations in production, storage, transportation, and utilisation

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



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

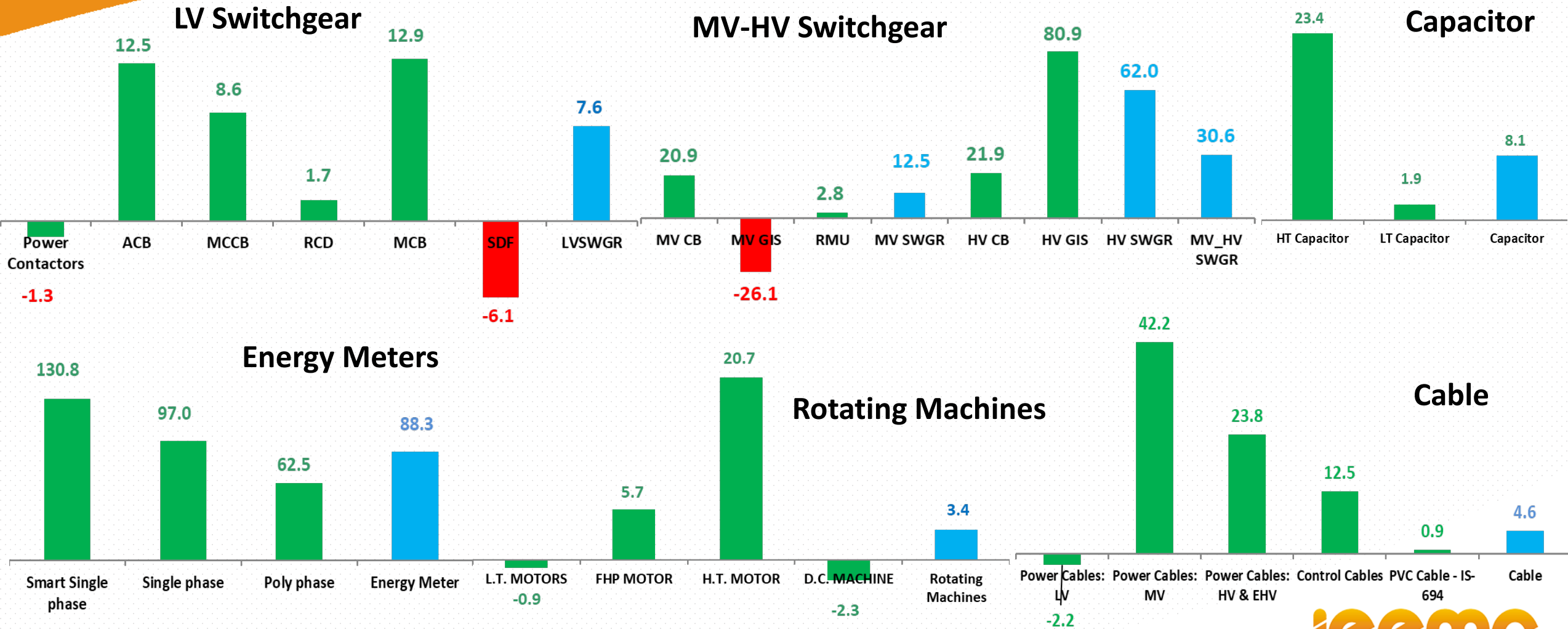
Growth Index for Electrical Equipment industry Apr 2025 – Jun 2025 compared with Apr 2024 – Jun 2024



- 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

Sector wise break-up of % Growth Index

Apr 2025 – Jun 2025 compared with Apr 2024 – Jun 2024



Detailed Growth Index for Electrical Equipment Industry

Product Category	Apr - Jun 25 comapred to Apr - Jun 24	Product Category	Apr - Jun 25 comapred to Apr - Jun 24
L.T. Motors	-0.9	MV CB	20.9
FHP Motors	5.7	MV GIS	-26.1
H.T. Motors	20.7	RMU	2.8
D.C. Machine	-2.3	MV SWGR	12.5
Rotating Machines	3.4	HV CB	21.9
Power Cables: LV	-2.2	HV GIS	80.9
Power Cables: MV	42.2	HV SWGR	62.0
Power Cables: HV & EHV	23.8	HV_MV Swgr	30.6
Control Cables & other Special Purpose Cables	12.5	Power Contactors	-1.3
PVC Cable - IS-694	0.9	ACB	12.5
Cable	4.6	MCCB	8.6
Distribution Transformer	-5.6	RCD	1.7
Power Transformer	21.6	MCB	12.9
Transformer	8.5	SDF	-6.1
Smart Single phase	130.8	LVSWGR	7.6
Single phase	97.0	Current Transformer	-27.2
Poly phase	62.5	Voltage Transformer	36.9
Meter	88.3	Instrument Transformer	-14.2
Conductors	21.2	Polymer	23.1
Transmission Line Towers	18.1	Porcelain	-30.1
Tramsmission Lines	19.7	Surge Arrester	9.2
HT Capacitor	23.4	Porcelain	19.8
LT Capacitor	1.9	Composite	23.8
Capacitor	8.1	Insulator	21.2

**Overall Electrical
Equipment Industry
Growth Index**



**Apr - Jun 25
comapred to
Apr - Jun 24**

11.7

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
Rotating Machines	10.1	17.9	10.0	5.6	3.4
LV Switchgear	15.9	5.4	23.2	15.6	7.6
HV Switchgear	36.8	27.8	26.8	-0.3	30.6
Cables	14.2	6.9	11.6	-1.2	4.6
Power Transformers	53.8	23.6	38.0	32.9	21.6
Dist Transformers	33.3	14.7	10.5	17.6	-5.6
Capacitors	-7.5	11.3	-9.5	3.0	8.1
Energy Meters	13.1	1.6	22.1	44.6	88.3
Transmission Lines	34.3	31.5	6.6	3.7	18.1
Conductors	5.1	-11.0	9.2	11.4	21.2
Insulators	27.6	12.0	2.9	10.9	21.2
Electrical Equipment Industry Growth Index	21.6	12.7	16.7	10.2	11.7

Most of the product seen growth QOQ, Slowdown for Distribution Transformer

Import and Export data

ITC codes	Product Groups	Apr - Jun FY 2025-26		Apr - Jun FY 2024-25		April - Jun FY 26 Vs FY 25		Domestic % Growth April - Jun 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	2751	1485	1825	1266	51	17	3.4
850423	Power TRF	76	214	85	389	-11	-45	21.6
850421-22, 850433-34	Distribution TRF	245	972	215	999	14	-3	(-) 5.6
853210	Capacitors	41	110	98	103	-58	7	8.1
8535, 853720	HV SWGR incl. Panels	967	1213	872	900	11	35	30.6
8536, 853710	LT Switchgears incl Panels	5882	4442	5000	4097	18	8	7.6
854442/49/60	Cables - LV & HV	786	2651	531	1914	48	39	4.6
902830	Energy Meters	15	101	14	125	7	-19	88.3
73082011/19	Tr. Line Towers	2	126	11	168	-82	-25	18.1
7604 & 7614	Conductors	229	915	247	1239	-7	-26	21.2

- Import – top countries - China, Germany, Russia, Hongkong, USA
- Export – top countries - USA, Germany, UAE, UK, France

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