

Now Available

POWER DISTRIBUTION IN INDIA 2020

Sector Growth, Discom Performance, Emerging Trends and Future Outlook

- ❖ Report (PDF)
- ❖ Data-set (Excel)

The report will help you:

- ❖ Identify key market trends and growth in the sector for the period 2014-15 to 2018-19
- ❖ Analyse the impact of recent policy and regulatory developments
- ❖ Assess the progress, challenges and opportunities under various government programmes
- ❖ Identify the new and emerging opportunities in the sector
- ❖ Gain insights into sector outlook
- ❖ Understand the issues and challenges impacting the power distribution segment
- ❖ Track the operation and financial performance of all state and private discoms in recent years

India Infrastructure Research

www.indiainfrastructure.com

India Infrastructure Research has recently released the Power Distribution in India report (2020).

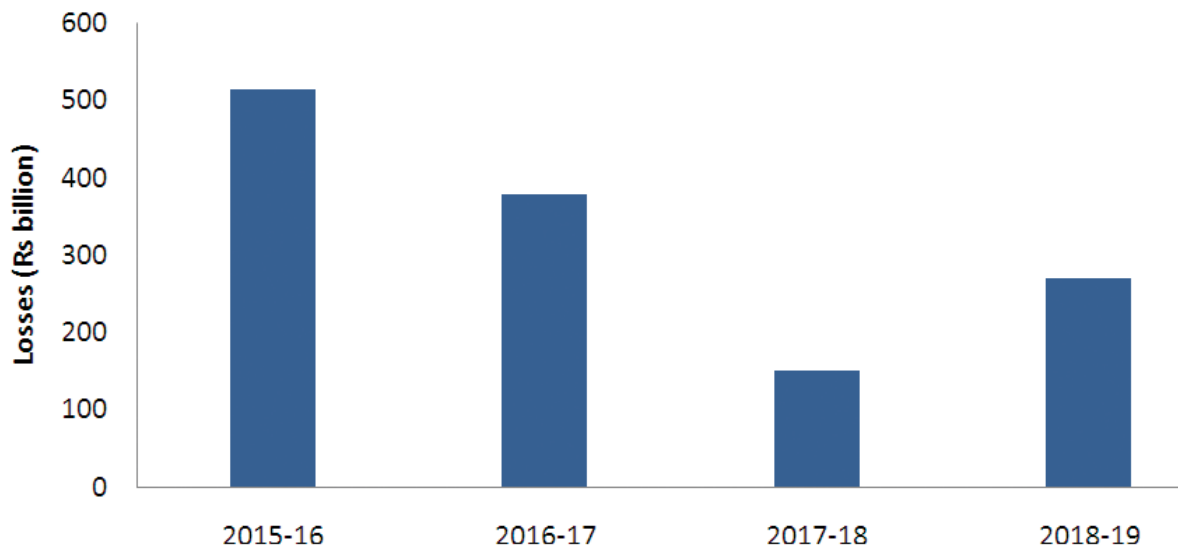
The report covers:

- Insightful analysis of the power distribution market, its historical size and growth
- A five-year forecast of growth, investments, costs, tariffs and discom finances
- Impact of recent and upcoming policies and government programmes (UDAY, IPDS, DDUGJY and NSGM)
- Detailed analysis and profiles of public and private discoms
- Analysis of key emerging segments such as distribution franchisee and smart metering, etc.

Report Summary and Key Insights

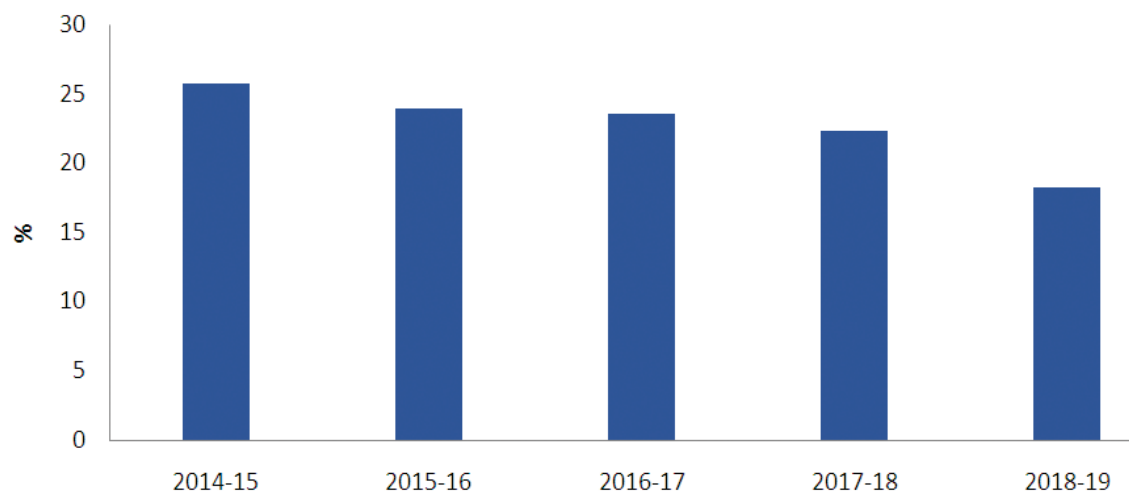
- There has been significant growth in the power distribution network over the past five years. As per India Infrastructure Research, the distribution line length and transformer capacity have increased at an estimated CAGR of 4% and 7%, respectively. Discom-wise, TANGEDCO and MSEDCL have the highest line length and transformer capacity.
- The discoms' consumer base has also been increasing steadily. As per the data collected by India Infrastructure Research, the total electricity consumers are expected to be around 278 million as of March 2019, recording a CAGR of 5% in the Past five years.
- On the AT&C loss front, there has been a steady decline at the all-India level during the past five years, from 25.72% in 2014-15 to 18.19% in 2018-19. However, it continues to be higher than the target of 15% set under the Ujwal Discom Assurance Yojana (UDAY). The progress in AT&C loss reduction has been skewed across states. While some states have managed to achieve the 15% target, various others have reported AT&C losses of around 30%.

Trend in Discom Book Losses



Source: Ministry of Power

Trend in AT&C Losses



Source: Ministry of Power

- High book losses of discoms is another cause for concern for the segment. Under the UDAY, the cumulative book losses of discoms declined from Rs 515 billion in 2015-16 to Rs 150 billion in 2017-18, a whopping 70% decline. However, the losses increased by a hefty 80% to Rs 270 billion in 2018-19 over 2017-18.
- Various government schemes such as the Integrated Power Development Scheme and the Deendayal Upadhyaya Gram Jyoti Yojana have over the years aimed to improve the operational performance of power utilities, and promote network expansion and strengthening. The National Smart Grid Mission and the Smart Metering National Programme have been focused on developing smart grids in the country and promoting smart meter deployment respectively.
- Going forward, the utilities are expected to continue with network expansion and strengthening in the coming years for providing quality and reliable power supply to all. Further, with 100% household electrification under Saubhagya, the discoms are likely to witness an increase in their consumer base.
- Besides this, the union government has proposed to replaced all the existing meters with smart prepaid meters in the next three years, which is expected to generate demand for around 300 million meters. Overall, there is expected to be significant demand for cables, conductors, transformers, and switchgear in the coming years, owing to network strengthening and expansion by utilities.
- Apart from this, the key trends/reforms to watch out for in the coming years will be the separation of carriage and content, redesigning of the tariff structure, private participation and direct benefit transfer subsidy.

About India Infrastructure Research

India Infrastructure Research is a division of India Infrastructure Publishing, a company dedicated to providing information on the infrastructure sectors through magazines, conferences, newsletters and research reports. We have 22 years of experience in tracking and analysing infrastructure sectors and publish about 35 plus multi-client reports in the areas of power, renewable energy, oil & gas, ports & shipping, roads & bridges, urban infrastructure, telecommunications, aviation, railways, water, health, housing, banking and infrastructure finance. We also publish six magazines - *Power Line*, *Indian Infrastructure*, *Renewable Watch*, *tele.net*, *Gujarat infrastructure* and *Smart Utilities* and have two online databases - www.indiainframonitor.com (covering all infrastructure projects with investments of over Rs 1 billion) and www.indiapowerregulation.com, which provides information on the regulatory developments in the Indian electricity sector. India Infrastructure offers custom research services as well, drawing on our staff of almost four dozen infrastructure research analysts.

SECTION I: TRENDS, DEVELOPMENTS, OUTLOOK AND PROJECTIONS

1. Sector Size and Growth

- ❖ Growth Drivers
- ❖ Trends in Power Demand and Supply
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- ❖ Consumer Growth
- ❖ AT&C Loss Targets and Achievements
- ❖ Metering Scenario
- ❖ System Reliability Indices
- ❖ Key Issues and Concerns
- ❖ The Way Forward

2. Recent Policy and Regulatory Developments

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- ❖ SCED Pilot Implementation
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24. APPENDIX

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