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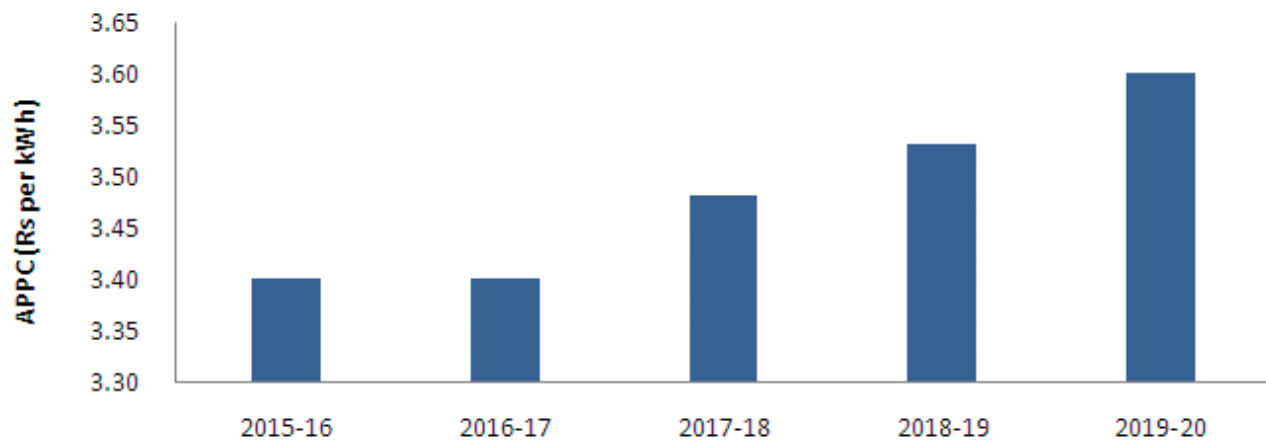
ELECTRICITY TARIFF TRENDS IN INDIA

Analysis by Consumers: HT/LT Industrial, Commercial, Residential and Agriculture
Analysis by State and Time Period

Electricity Tariff Trends in India

With discoms struggling to manage their finances, upward tariff revisions across the five power consumer categories in 2019-20 point towards a trend of dearer electricity and higher power bills. Draft amendments to the tariff policy, 2016, specify that the consumers are not liable to pay the price of discom inefficiencies. To this end, amendments such as provision of uninterrupted power supply to consumers and penalties for load shedding; simplification of tariff categories and maximum limit for the imposition of cross subsidy surcharge, have been proposed to create an environment of accountability and better management for discoms.

Trends in National Average Power Purchase Costs



Source: CERC; India Infrastructure Research

The national average power purchase cost, which accounts for 70-80 percent of cost of service for distribution utilities, has been increasing over the years. The actual power purchase cost for the discoms has generally remained higher than the approved power purchase cost, leading to delays in passing on the cost variation to the customers in a timely manner and adversely affecting the financials of the discoms.

The Sale of power to the industrial and commercial consumer categories is estimated to remain slightly muted in the short term owing to the market reaction to recent economic measures taken by the government but will eventually correct itself in the long term. Meanwhile, the residential segment accounts for the largest sales volumes and residential consumers may see a slightly higher growth over the next five years. Agricultural segment is likely to continue its growth at a pace similar to that seen over the past couple of years.

The tariff revisions over the past five years have been fluctuating. The impact of this is felt on discom revenues across the country. The tariffs in almost every category saw a negative revision in 2018-19, after a series of decline in the two preceding revisions. In 2019-20, however, most discoms have increased the tariffs, in a bid to generate greater revenues and improve their financial condition.

Electricity Tariff Trends in India

Executive Summary

1. Power Sector Market Overview

- ❖ Power Demand and Supply Trends
- ❖ Fuel-wise Power Generation
- ❖ Retail Power Market Structure
 - HT Industrial Segment
 - LT Industrial Segment
 - Commercial Segment
 - Residential Segment
 - Agricultural Segment
- ❖ Key Recent Developments
- ❖ Overall Power Tariff Trends
- ❖ Trends in National Average Power Purchase Cost
- ❖ Issues and Challenges

SECTION I: HT INDUSTRIAL CONSUMERS MARKET

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 - Sale of Power to HT Consumers
 - Share of HT Consumers in Total Power Sales
- ❖ Outlook and Projections

3. Tariff Trends

- ❖ All-India Average HT Industrial Tariff Revisions
- ❖ State- and Utility-wise Trends in the Average Rate of Sale of Power
- ❖ HT Tariffs as a Percentage of the Average Cost of Supply
- ❖ Year-on-year Changes in Tariffs
- ❖ Trends in Cross Subsidy Surcharges for HT Industrial Consumers
- ❖ Trends in Short-term Retail Power Trading

SECTION II: LT INDUSTRIAL CONSUMERS MARKET

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11. Tariff Trends

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- ❖ State- and Utility-wise Trends in Average Rate of Sale of Power
- ❖ Year-on-year Changes in Tariffs

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