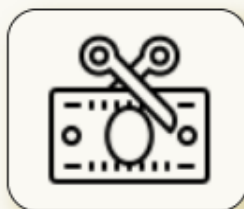


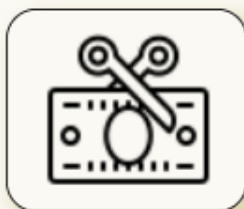


Telangana Growth Analysis & Insight



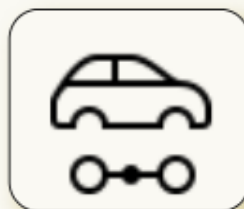
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- **Document registration** across districts
- **Top 5 districts** with highest doc. reg. revenue growth **between FY 2019-2022**
- Top 5 Districts where **e-stamps Revenue** Contributes Significantly more than Doc.



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- **e-Stamp & Doc. Count Pattern** Since Implementation of e-Stamp.
- **Categorized Districts** into three segments based on their stamp registration revenue



Transport Page-1

- Vehicle Sales and **Months**
- Vehicle Sales and **Seasons**



Transport Page-2

- Districts with a **Predominant vehicle class**
- YOY Growth **Top/Bottom Districts for Fuel Type**
- **Distribution of Vehicles** Vary by Vehicle Class Across Districts



TS-iPass

- Districts with a **Predominant vehicle class**
- YOY Growth **Top/Bottom Districts for Fuel Type**
- **Distribution of Vehicles** Vary by Vehicle Class Across Districts



District ▼
All ▼

Average Document Revenue per
Document Registration

2019

2020

2021

2022

Q1

Q2

Q3

Q4

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TS iPass

₹106.70bn

Doc. Revenue

₹107.15bn

e-Stamps Revenue

88.39K

Avg Rev./Doc Reg.

Document Registration Vary
Across Districts

Document Registration Across Districts



Top 5 Districts with Highest Doc. Reg. Revenue Growth Between FY 2019-2022

district	2019	2022	Revenue Growth	Revenue Growth %
Mulugu	80.35M	217.7M	137.35M	170.94
Adilabad	178.08M	396.84M	218.76M	122.84
Karimnagar	804.4M	1,550.45M	746.05M	92.75
Mancherial	338.41M	648.89M	310.49M	91.75
Medchal_Malkajgiri	12,543.29M	24,043.52M	11,500.24M	91.68

Top 5 Districts where e-stamps Revenue Contributes Significantly more than Doc.

district	Doc. Revenue	e-Stamps Revenue	Doc. Revenue %	e-Stamp Revenue %	eStamp/Doc Ratio %
Jangoan	₹473.73M	₹485.77M	49.37%	50.63%	102.54%
Nirmal	₹338.58M	₹345.68M	49.48%	50.52%	102.10%
Mancherial	₹648.89M	₹661.73M	49.51%	50.49%	101.98%
Rangareddy	₹37,697.75M	₹38,349.36M	49.57%	50.43%	101.73%
Kamareddy	₹471.63M	₹479.19M	49.60%	50.40%	101.60%



District

All

Average Document Revenue and Count Before & After e-Stamp implementation

2019

2020

2021

2022

Q1

Q2

Q3

Q4

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TS iPass

120.44M

Avg. Doc. Rev. BE

252.48M

Avg. Doc. Rev AE

3.26K

Avg. Doc. Count BE

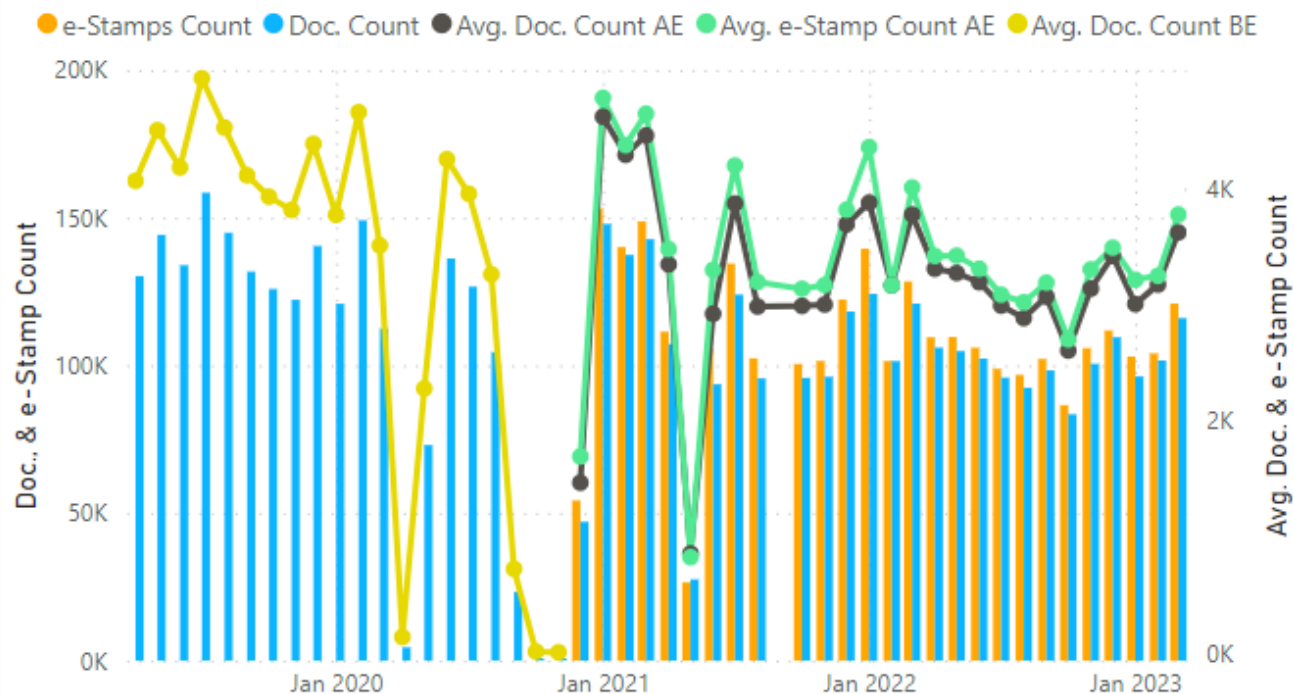
3.23K

Avg. Doc. Count AE

e-Stamp & Doc. Count Pattern Since Implementation of e-Stamp

After e-Stamp

Before e-Stamp



Categorized Districts into 3 Segments Based on Their e-Stamp Registration Revenue

district	eStamps Revenue	eStamp Revenue %	District Category (Revenue)
Rangareddy	₹81,336.99M	36.86	High
Medchal_Malkajgiri	₹48,819.37M	22.12	High
Hyderabad	₹28,652.40M	12.98	High
Sangareddy	₹16,708.22M	7.57	Medium
Hanumakonda	₹5,751.12M	2.61	Medium
Yadadri Bhuvanagiri	₹4,254.39M	1.93	Medium
Khammam	₹4,208.23M	1.91	Medium
Nizamabad	₹3,047.09M	1.38	Medium
Nalgonda	₹3,009.30M	1.36	Medium
Karimnagar	₹2,989.07M	1.35	Medium
Mahabubnagar	₹2,236.92M	1.01	Medium
Suryapet	₹2,092.90M	0.95	Low
Siddipet	₹1,947.54M	0.88	Low
Peddapalli	₹1,271.07M	0.58	Low

BE: Before e-Stamp, AE: After e-Stamp

District ▼All ▼

2019

2020

2021

2022

Q1

Q2

Q3

Q4

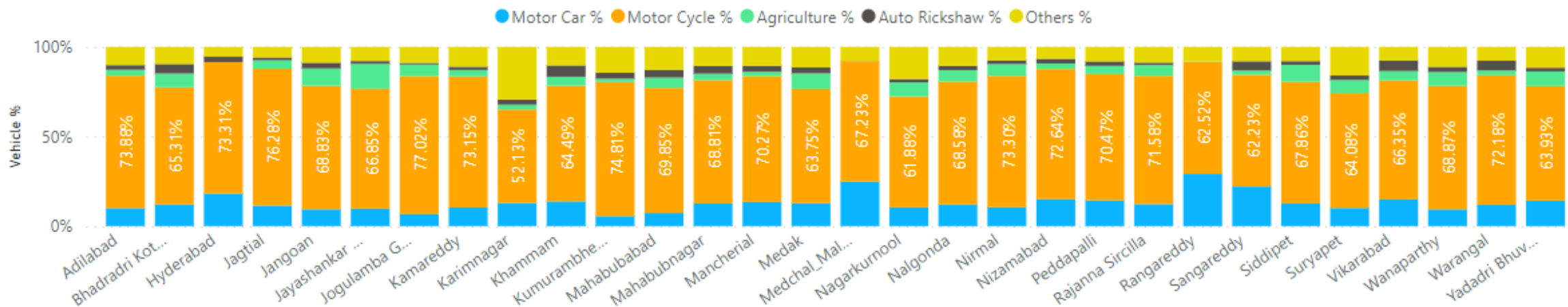
Distribution of Vehicles Vary by Vehicle Class Across Districts

district	Agri.	Auto Rickshaw	Motor Car	Motor Cycle	Others	Predominant Vehicle Class
Rangareddy	449	69	71832	154186	20064	MCY(3), MCAR(1), OTH(1)
Medchal_Malkajgiri	261	83	61071	164626	18841	MCY(2), MCAR(2), OTH(2)
Hyderabad	20	8397	51447	206819	15439	MCY(1), MCAR(3), AUTO(1), OTH(3)
Khammam	2121	2690	5880	27385	4387	AUTO(3)
Sangareddy	1570	3381	14565	40784	5238	AUTO(2)
Suryapet	2188	739	3038	19165	4776	AGRI(3)

YOY Growth Top / Bottom District for Fuel Type Electric

	All	Diesel	Electric	Petrol
district	Selected Year	Last Year	YOY Growth %	
Khammam	759	149	409.40%	
Bhadradri Koth...	290	76	281.58%	
Suryapet	670	193	247.15%	
Mahabubabad	101	36	180.56%	
Jangoan	170	72	145.21%	
Total	62532	31004	101.69%	

Distribution of Vehicles Vary by Vehicle Class Across Districts



MCY: Motor Cycle, MCAR: Motor Car, AGRI: Agriculture, AUTO: Auto Rickshaw



District ▼

All ▼

2019

2020

2021

2022

Q1

Q2

Q3

Q4

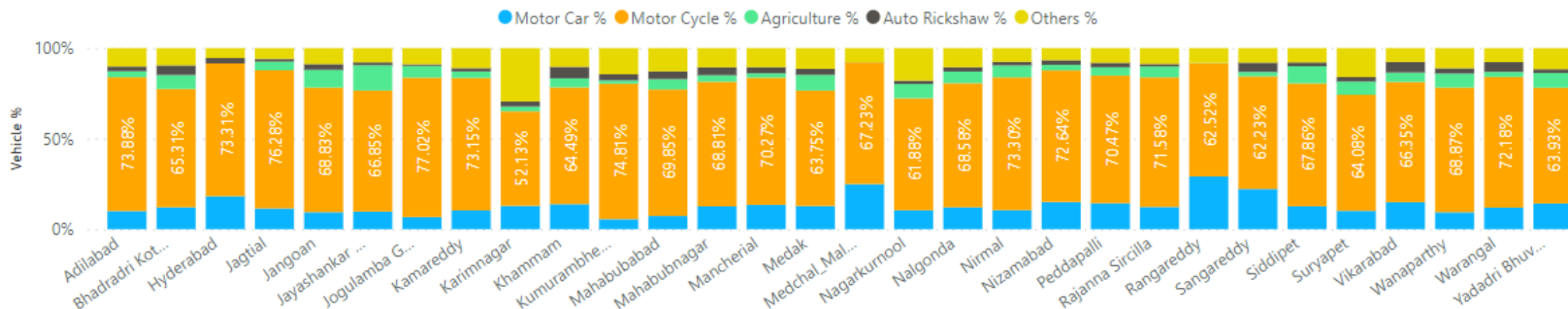
Distribution of Vehicles Vary by Vehicle Class Across Districts

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Khammam	2121	2690	5880	27385	4387	AUTO(3)
Sangareddy	1570	3381	14565	40784	5238	AUTO(2)
Suryapet	2188	739	3038	19165	4776	AGRI(3)

YOY Growth Top / Bottom District for Fuel Type Petrol

district	Selected Year	Last Year	YOY Growth %
Rangareddy	200289	184204	8.73%
Hyderabad	231166	228817	1.03%
Medchal_Malka...	200121	201947	-0.90%
Sangareddy	49507	53583	-7.61%
Karimnagar	24574	29074	-15.48%
Total	1118857	1300723	-13.98%

Distribution of Vehicles Vary by Vehicle Class Across Districts



MCY: Motor Cycle, MCAR: Motor Car, AGRI: Agriculture, AUTO: Auto Rickshaw



District ▼

All ▼

2019 2020 2021 **2022** Q1 Q2 Q3 Q4

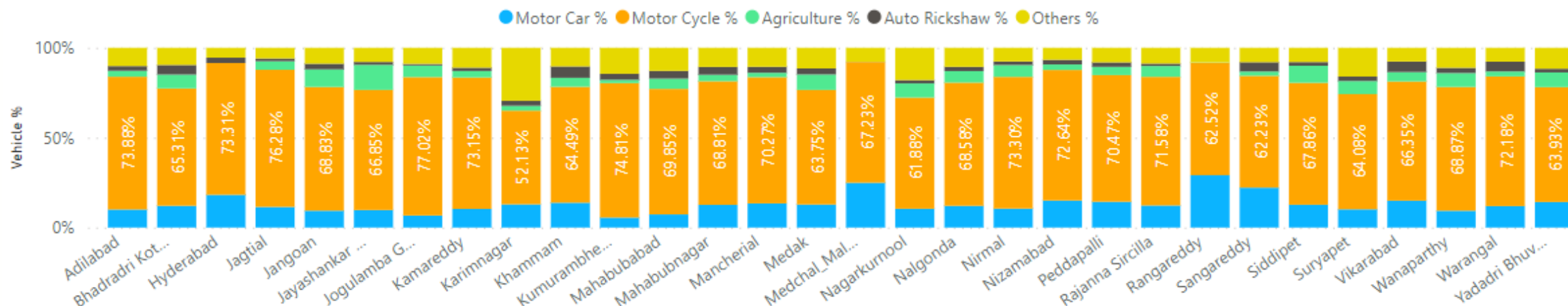
Distribution of Vehicles Vary by Vehicle Class Across Districts

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Hyderabad	20	8397	51447	206819	15439	MCY(1), MCAR(3), AUTO(1), OTH(3)
Khammam	2121	2690	5880	27385	4387	AUTO(3)
Sangareddy	1570	3381	14565	40784	5238	AUTO(2)
Suryapet	2188	739	3038	19165	4776	AGRI(3)

YOY Growth Top / Bottom District for Fuel Type Diesel

district	Selected Year	Last Year	YOY Growth %
Karimnagar	10644	5034	111.44%
Sangareddy	9275	8193	13.21%
Rangareddy	27843	24711	12.67%
Adilabad	2523	2267	11.29%
Kamareddy	3225	3001	7.46%
Total	196103	199346	-1.63%

Distribution of Vehicles Vary by Vehicle Class Across Districts



MCY: Motor Cycle, MCAR: Motor Car, AGRI: Agriculture, AUTO: Auto Rickshaw



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Top 5 Sectors by Investments

Sector	Investment
Plastic and Rubber	5,855.61
Pharmaceuticals and Chemicals	2,181.63
Real Estate,Industrial Parks and IT Buildings	2,127.30
Solar and Other Renewable Energy	2,052.99
Engineering	1,877.45

Sectors shown substantial investment in multiple districts

sector	Investment	District Sector Rank	No. of District
Plastic and Rubber	5,582.16	1	2
Solar and Other Renewable Energy	1,652.03	1	5
Paper and Printing	962.30	1	1
Cement, Cement & Concrete Products, Fly Ash Bricks	946.83	1	1
R&D	938.29	1	1
Engineering	841.12	1	3

Investment

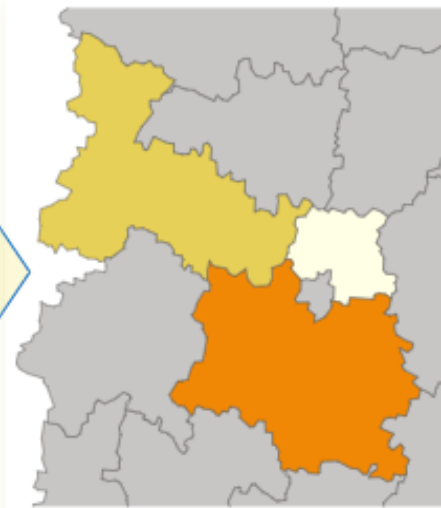
26K✓
LY: 18K (+44.02%)

Employees

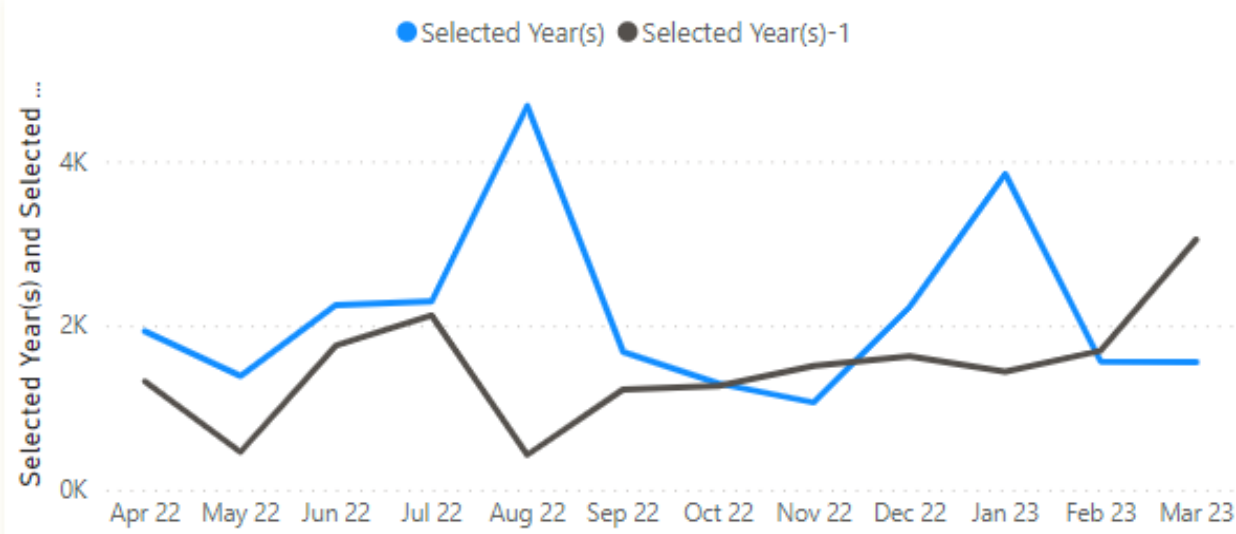
102K✓
LY: 96K (+6.13%)

11.Top 3 Districts by Investments

district	Investment	Employees
Rangareddy	8,663.79	21978
Sangareddy	4,602.71	23067
Medchal_Malkajgiri	2,768.52	14981



Seasonal Investment Trends for Sector(s): All





District ▼ sector ▼

All ▼ All ▼

2019 2020 2021 2022

Q1 Q2 Q3 Q4

Top 5 Sectors by Investments

Sector	Investment
Real Estate,Industrial Parks and IT Buildings	29,778.17
Pharmaceuticals and Chemicals	15,858.06
Plastic and Rubber	9,649.78
Solar and Other Renewable Energy	5,639.70
Fertilizers Organic and Inorganic,Pesticides,Insecticides, and Other Related	5,418.40

Investment

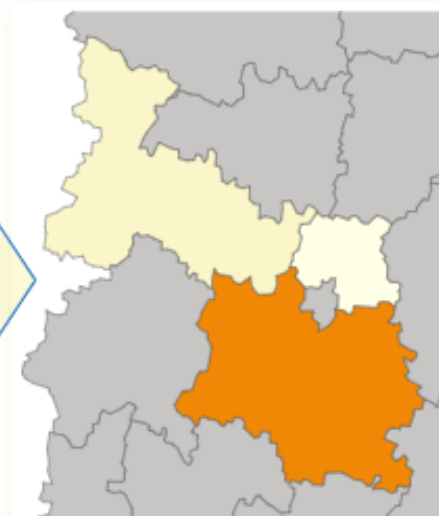
26K✓
LY: 18K (+44.02%)

Employees

102K✓
LY: 96K (+6.13%)

11.Top 3 Districts by Investments

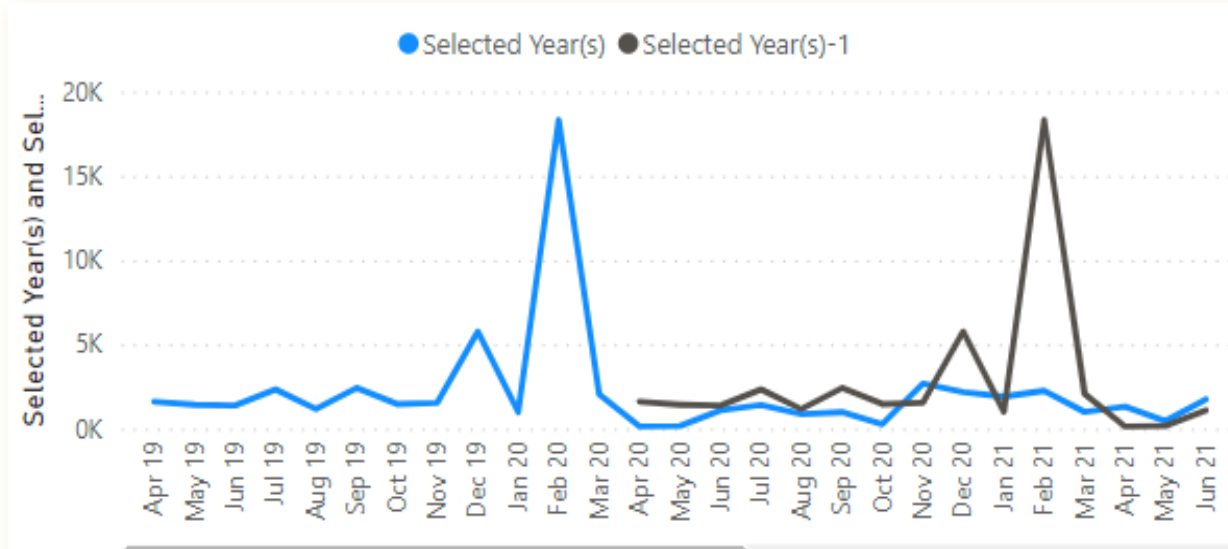
district	Investment	Employees
Rangareddy	42,706.33	387758
Sangareddy	12,366.76	74292
Medchal_Malkajgiri	10,394.56	62662



Sectors shown substantial investment in multiple districts

sector	Investment	District Sector Rank	No. of District
Real Estate,Industrial Parks and IT Buildings	28,970.27	1	1
Pharmaceuticals and Chemicals	10,471.86	1	4
Fertilizers Organic and Inorganic,Pesticides,Insecticides, and Other Related	5,254.28	1	1
Solar and Other Renewable Energy	3,209.39	1	5
Paper and Printing	2,007.39	1	2

Seasonal Investment Trends for Sector(s): All



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District
▼

sector
▼

All
▼

All
▼

2019

2020

2021

2022

Q1

Q2

Q3

Q4

Top 5 Sectors by Investments

Sector	Investment
Pharmaceuticals and Chemicals	9,042.57
Plastic and Rubber	7,915.23
Real Estate,Industrial Parks and IT Buildings	4,142.56
Engineering	2,844.97
Food Processing	2,455.31

Investment

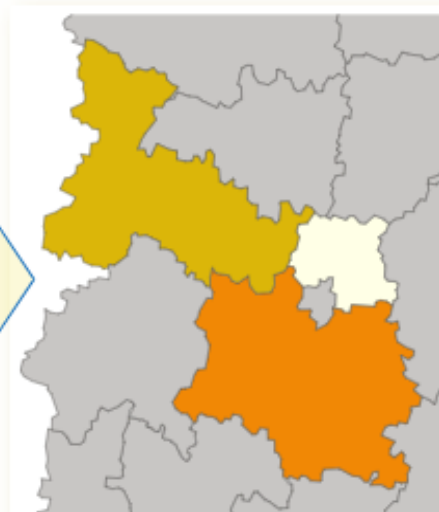
26K✓
LY: 18K (+44.02%)

Employees

102K✓
LY: 96K (+6.13%)

11.Top 3 Districts by Investments

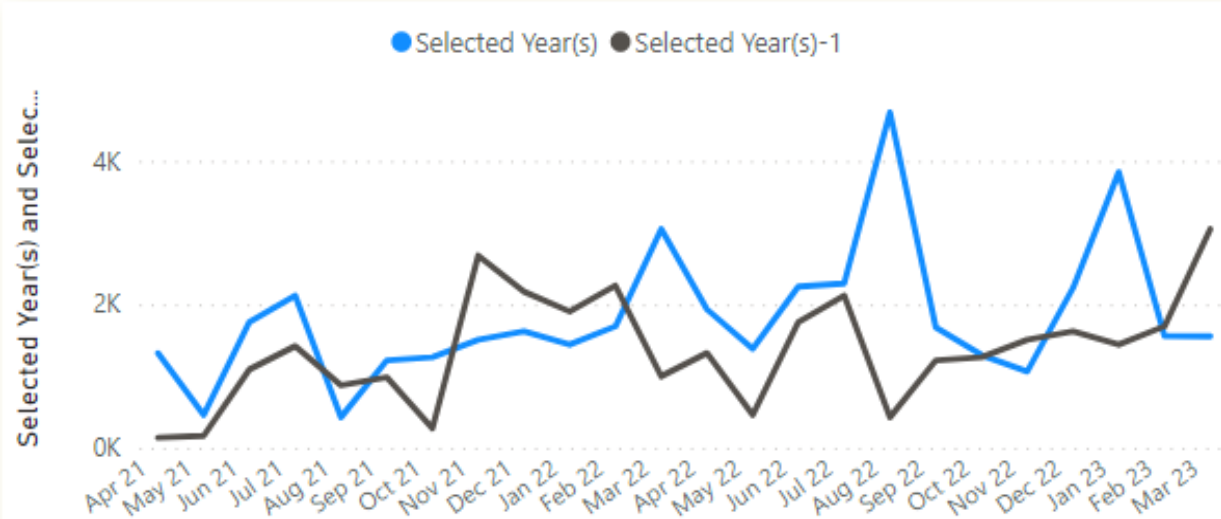
district	Investment	Employees
Rangareddy	12,480.63	31810
Sangareddy	8,776.51	45879
Medchal_Malkajgiri	5,364.15	29677



Sectors shown substantial investment in multiple districts

sector	Investment	District Sector Rank	No. of District
Food Processing	558.52	1	11
Pharmaceuticals and Chemicals	4,514.54	1	4
Solar and Other Renewable Energy	1,364.04	1	4
Engineering	848.81	1	3
Agro based incl Cold Storages	816.78	1	2
Beverages	1,797.00	1	2
Granite and Stone Crushing	111.21	1	2

Seasonal Investment Trends for Sector(s): All





Stamp Registration: Insight Summary

- The top 5 districts with the highest **document** registration revenue **growth between FY 2019 and 2022**: Mulugu 2. Adilabad 3. Karimnagar 4. Mancherial 5. Medchal Malkajgiri.
- **FY 2022: Jangoan, Nirmal, Mancherial, Rangareddy, and Kamareddy** districts have substantial revenue from both Document and e-Stamps.
 - **Rangareddy** district leads in total revenue for both categories.
 - Districts maintain a **balanced revenue distribution, with e-Stamps slightly higher** than Document Revenue.
- **Districts Categorized by e-Stamp Registration Revenue:**
 - **Revenue Segmentation:** The districts are categorized into three segments based on their e-Stamp registration revenue: **High (e-Stamp Rev>10), Medium(e-Stamp Rev>1 and <=10), and Low (e-Stamp Rev<=1)**.
 - It's evident that the **top three** districts (**Rangareddy, Medchal_Malkajgiri, and Hyderabad**) generate a significant share of the e-Stamp registration revenue ("High"). In contrast, majority of districts fall into the "Low" category and contribute relatively smaller portions of revenue.
 - **Effect on Growth:** High-revenue districts are likely to have more resources and funding for infrastructure development, public services, and economic growth. Conversely, low-revenue districts may face challenges in funding essential projects and services.
 - **Regional Disparities: These regional disparities can impact the growth and development of districts**, as high-revenue districts have more resources and funding available for various developmental projects and services, potentially leading to better infrastructure, education, healthcare, and overall economic growth. Addressing these disparities may involve policies and initiatives aimed at redistributing resources and fostering growth in low-revenue districts to ensure more balanced regional development
 - .
- **e-Stamp & Doc. Count Pattern Since Implementation of e-Stamp**
 - The data shows a significant increase in both e-Stamp and document counts after the implementation of e-Stamp challan.
 - After implementation, there's a clear upward trend in e-Stamp and document counts from December 2020 to March 2023.
 - **Clear increase in e-Stamp and document counts after the implementation of e-Stamp**, which suggests **improved adoption of the system**.
 - Continued monitoring and improvement of the system, along with training and support, can further enhance its success.



➤ Distribution of Vehicles by District and Vehicle Class FY 2022:

- **Hyderabad, Medchal_Malkajgiri, and Rangareddy** have a high number of **motor cars and motorcycles**, indicating urbanization and motorization. Encourage motor vehicle-related businesses, emission control, and mass transit.
- **Nalgonda, Siddipet, and Suryapet** rely on **agricultural vehicles**.
- Hyderabad has a diverse mix of vehicle classes.
- **Hyderabad, Sangareddy, and Khammam** have potential for **eco-friendly auto rickshaws**.

➤ Distribution of Vehicles Vary by Vehicle Class Across Districts FY 2022

- **Motor cycle Dominance:** **Motorcycles are the most popular vehicle class in almost all districts**, with percentages ranging from 52.13% to 77.02%. This suggests that **motorcycles** are the **preferred mode of transportation** in the region.
- **Motor Car Distribution:** The distribution of motor cars varies widely across districts, with Hyderabad and Rangareddy having the highest percentages at 18.24% and 29.13%, respectively. This indicates higher urbanization and economic activity in these areas.
- **Agricultural Vehicles:** The percentage of agriculture vehicles is relatively low in most districts, with the highest in **Jayashankar Bhupalpally** at 13.97%. This implies that non-urban areas have a more significant presence of agricultural vehicles.
- **Auto Rickshaws:** Auto rickshaws are more prevalent in urban areas like Hyderabad and Medchal_Malkajgiri, where their percentages are relatively higher. This suggests their use as a mode of urban transport.



- **Top 3 Districts with Highest YOY Growth for Electric Vehicles:**
 - **Khammam (409.40%), Bhadradri Kothagudem (281.58%), Suryapet (247.15%)** district has shown the highest YOY growth in electric vehicle sales, indicating a significant increase in the adoption of EVs.
 - The government should focus on understanding the **factors that have contributed to this growth and consider replicating successful strategies in other districts.**
 - The government should invest in **charging infrastructure and awareness programs** to sustain this growth.
- **Bottom 3 Districts with Highest YOY Growth for Electric Vehicles:**
 - **Wanaparthy (5.48%), Mahabubnagar (19.44%), Adilabad (20.22%)** district exhibits low YOY growth, indicating room for improvement.
 - Overall, the government should continue to invest in charging infrastructure, provide incentives, and run awareness campaigns across all districts, with a special focus on replicating the success of districts with high growth rates to accelerate the adoption of electric vehicles throughout the region.
- **Districts with Highest YOY Growth for Petrol Vehicles:**
 - While some districts experienced positive YOY growth in petrol vehicle sales, the majority of districts saw a decline in sales compared to the previous year.
 - Rangareddy had the highest YOY growth at 8.73%., however looking FY 2020, it shows decline.
- **Bottom 3 Districts with Highest YOY Growth for Petrol Vehicles:**
 - Districts, such as Warangal, Nirmal, Jagtial, and Rajanna Sircilla, experienced significant negative growth, suggesting potential issues in the local automotive market or may be due to increase in electric vehicles growth.



- **Top 5 sectors that have witnessed the most significant investments in FY 2022.**
 - Plastic and Rubber (5855.61 crore)
 - Pharmaceuticals and Chemicals (2181.63 crore)
 - "Real estate, Industrial Parks and IT Buildings (2127.30 crore)
 - Solar and Other Renewable Energy (2052.99 crore)
 - Engineering (1877.45 crore)
- **The Top 3 Districts that have Attracted the Most Significant Sector Investments During FY 2019 to 2022**
 - Rangareddy (42706.33)
 - Sangareddy (12366.76)
 - Medchal_Malkajgiri (10394.56)
- **Sectors that have Shown Substantial Investment in Multiple Districts Between FY 2021 and 2022**

<u>Sector</u>	<u>Investment</u>	<u>#of District in Rank</u>
• Food Processing	558.52	11
• Pharmaceuticals and Chemicals	4514.54	4
• Solar and Other Renewable Energy	1364.04	4
• Engineering	848.81	2
• Agro. based incl Cold Storages	816.78	2