India Reactive Power Compensation Market Outlook to 2020 - Rising Industrial Output and Renewable Energy Integration to Foster Growth

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Abstracts

The report titled “India Reactive Power Compensation Outlook to 2020 - Rising Industrial Output and Renewable Energy Integration to Foster Growth” provides a comprehensive analysis of the various aspects such as market size of the India reactive power compensation, organized and unorganized market, reactive power compensation market for the renewable energy, market for different type of reactive power compensation equipments and others. The report also covers the market shares and revenues of major manufacturers in India and international players in the reactive power compensation equipments market.

The reactive power compensation industry in India which is driven by increased industrialization and need for voltage control in the transmission and distribution network, registered revenues of INR ~ crore in FY’2015. The market witnessed a year on year hike in the demand of reactive power compensation. The government rules and regulations for the management of the reactive power form the grid play an important role in the reactive power compensation. The industry witnesses a CAGR of more than ~ % during FY’2010-FY’2015. The market valued at INR ~ crore in the FY’2015 and witnessed a growth of over ~% as compared to the previous year. The increased awareness for the compensation of the reactive power to maintain the grid discipline and to keep the levels of voltage under control to avoid disturbances in the operations of the grid led to increased growth of the reactive power compensation market.

The organized market largely consisted of consumers such as the railways, State Electricity Boards (SEBs), NTPC and other related power sector units and plants, as well as LS manufacturers such as TATA and other core sector industries. The unorganized sector consisted mainly of medium scale and small scale private

consumers. In FY’2015, organized segment accounted for ~% of the overall demand. The new demand of the equipments accounted to ~% of the total demand of the reactive power compensation equipments such as the shunt capacitors, reactors, Static VARs, FACTS and others. The upgradation demand in the network was approximately ~ MVAR as compared to the new demand which was 3,356.8 MVAR in the FY’2015. The replacement demand accounted for about ~% of the total demand and valued to almost ~ MVAR in the FY’2015. Conventional reactive power compensation systems sector comprised of ~% of the market revenues and valued to INR ~ crores in the FY’2015.

The reactive power compensation industry in India is comprised of various international manufacturers as well as local private manufacturers of the components. Companies such as ABB, Alstom, Schneider Electric and others, who have established themselves in the country since a long time and have acquired a majority of the customer base, have dominated the market. Almost ~% of the market was occupied by the small local players of India. ABB acquired the maximum share in the market followed by Alstom and Emerson Electric.

This market can be divided in three types, first for very slowly varying loads (high rise buildings, servers, escalators, distribution, elevators transformers and others), second is for fast changing loads (traction, elevators, and many of industrial loads), and third is very fast changing loads (spot welding, arc furnaces, cold rolling mills and others). The first two types of loads can employ APFC or TSC type compensation. However, the last category requires STATCON which is the dynamic reactive power compensator based on IGBT technology. The cost of this technology could be INR 4,000 to 5,000 / kVAr. The market was broadly divided as reactive power compensation using conventional technology and reactive power compensation using IGBT or active converter based technology.

The market of the reactive power compensation shall provide a number of opportunities for the manufacturers, local as well as international. The market is expected to rise in the coming five years (FY’2016-FY’2020) as the need for the reactive power compensation shall increase. This demand is expected to be driven by the integration of the renewable energy sources to the national grid. The increased demand of electricity in the future shall increase the need of better infrastructure and technology which shall be a major factor to drive the growth of the reactive power compensation equipments. The reactive power compensation market is expected to witness a year on year increase in the next five years to reach INR ~ crore by the end of the FY’2020 by growing at a CAGR of more than 22.5%.

Key Topics Covered in the Report:

- Market size on the reactive power compensation market on the basis of revenues in India, FY’2010-FY’2015
- Market size on the reactive power compensation market on the basis of demand in India, FY’2010-FY’2015. FY’2010-FY’2015
- Segmentation on basis of Type of Technology, by Type of Energy Source, by Production, by Demand categories, by type of equipments, FY’2015
- Market share of the major reactive power compensation players, FY’2015
- Value chain of the reactive power compensation market of India – including system integrators, distributors, turnkey solutions providers
- Business Models for the reactive power compensation market of India
- India Reactive Power Compensation Market Future Outlook And Projections, FY’2016-FY’2020
- Company profiles of ABB, Schneider Electric, Alstom, General Electric and Emerson Electric.
- SWOT analysis, Growth drivers and restraints, Issues and Challenges of the reactive power compensation market of India
- Decision process, Reactive power management in India and Government regulations.
- Comparative analysis of the reactive power compensation in India with other countries.
- Macro Economic factors affecting India reactive power compensation market
- Future outlook and projections of India reactive power compensation market

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