

Power and Distribution Transformer Market in India 2014 and 2020

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Abstracts

Aggregate Technical & Commercial (AT&C) losses has been a drag on the overall power in India and despite several reforms, little success has been achieved in reducing the loss levels across the country. Unbundling of state electricity boards into separate generation, transmission and distribution companies was done to promoting greater efficiency by streamlining operations of distribution, transmission, generation and trading, while also promoting transparency and accountability. However, 10 years since unbundling exercises was initiated, no state can claim that it has achieved the overall objective that was to be achieved through restructuring of SEBs. Accelerate Power Development & Reforms Programme (APDRP) that was launched in 2001 to reduce the loss levels to 15% by 2007, failed miserably due to several reasons and there is not even one state that can claim to have reduced the loss levels to 15%. The Restructured- Accelerated Power Development and Reforms Programme (RAPDRP), the most recent power distribution sector reforms seems to be step in right direction but one is not sure whether it will be able to achieve the objective of getting AT&C loss levels across India to 15%.

So, what exactly is required to stem these high AT&C losses, the answer is simple strengthening the power distribution / supply infrastructure & 100% metering across the 4 echelons of power distribution i.e. substation, feeders, distribution transformer and consumer. InfraInsights in its earlier edition of the report on Transformer Market in India had estimated that over 400 GVA of transformer capacity out of the total installed capacity of 1040 GVA would require repair / retrofit / replacement (as of 2012) and the number is slated to increase to 1548 GVA by 2020 out of estimated installed base of 1548 GVA. Overall a major revamp in the power evacuation infrastructure is the need of the hour and this will drive the transformer industry in India over and above the new opportunity that will be required to support the increasing power generation capacity

addition.

The electrical T&D equipment market in India has been through prolonged spell of slow down and green shoots has started emerging. Industry believes that with change in guard at the central government, next wave of investment in power sector will kick in which will drive the demand. Infralnsights is very confident that the future looks very promising for the Transformer Industry as the country's installed generation capacity is set to double from the levels of 228 GW to over 700 GW by 2030 and if a simple thumb rule of 1.5 MVA transformation capacity is required to support 1 MW capacity addition is considered, new demand for transformer industry is likely to be over 700 GVA alone. With an objective to achieve most optimal loss levels of sub 15% in the entire power sector, Transmission sector has to play a greater role, which is why under PGCIL, Transmission sector is moving quite rapidly towards UHV from EHV, this in turn is likely to increase demand for 765kV and 1200 kV Power Transformer. No surprises hence that despite excess capacity, some of the world's largest transformer manufacturers from countries like China (TBEA & TWBB) and South Korea has set up shop in India. While on other hand some of the traditional players that have existed in India's electrical equipment market are now looking to exit as they seem to have outsmarted by influx of overseas player that are able to provide top notch technology at a competitive price. Overall, Transformer market in India is set for positive future in the times to come and Infralnsights in its endeavour to keep a close watch on the development is releasing its second edition of Market Research Report focused on Transformer Industry in India. The report will not only do a status check of the market in terms of market size, market share, market leaders, market laggards, M&A, issues & challenges and forthcoming opportunities, but also track down the upcoming substation & R&M projects in different states of India. The key highlight point of the report will be assessment of demand for transformer from each and every discom in the country over a period of next 10 years. Infralnsights will conduct in-depth primary research to achieve the objective stated in the table of content of the report. The overall intent of the report is to apprise the market about what was the overall market performance in 2013-14 and what future beholds for the overall transformer industry upto 2020.

Contents

1. EXECUTIVE SUMMARY

2. APPROACH & METHODOLOGY

3. STUDY BACKGROUND

4. OVERVIEW ON TRANSMISSION AND DISTRIBUTION SECTOR IN INDIA

5. TRANSFORMER MARKET IN INDIA

Usage practice & usage norms

Market Composition

Key Participants/Stakeholders in Transformers business

Application areas of transformers

6. POWER TRANSFORMER MARKET SIZE IN INDIA: 2013-14

Company wise power transformer manufacturing capacity in India

Market Size by transformer ratings (above 5 MVA)

Market Size by transformer type (Dry Vs. Oil)

Market Size segmentation by MNC, Domestic & Imports

Market Size by voltage level of operations (upt1200kV)

Market Size by region (N, S, E, W)

Market Size by end use industry segment (Utility, Industry, Commercial)

Market Size by companies

Exports of Power Transformer

7. DISTRIBUTION TRANSFORMER MARKET IN INDIA: 2013-14

Company wise manufacturing capacity

Market Size by transformer ratings (upt5 MVA)

Market Size by transformer type (Dry Vs. Oil)

Market Size segmentation by MNC, Domestic & Imports

Market Size by voltage level of operations (upt33kV)

Market Size by region (N, S, E, W)

Market Size by end use industry segment (Utility, Industry, Commercial)

Market Size by companies

Exports of Distribution Transformer

8. MARKET FOR EPC PROJECTS IN TRANSFORMER INDUSTRY

Substation Project

Electrical Balance of Plant

9. CHALLENGES FACED BY THE TRANSFORMER INDUSTRY IN INDIA

Excessive manufacturing capacity

South Korean & Chinese companies gaining market share

Supply Chain - imports of CRGO

Diminishing technology differentiation

Focus on low cost as against quality & reliability

10. ANALYSIS ON FACTORS THAT WILL SHAPE TRANSFORMER MARKET IN INDIA

Consolidation – M&A

Solution focused approach instead of product focus

11. TRANSFORMER PRICING & MARGINS OF DIFFERENT COMPANIES

12. KEY BUSINESS DRIVERS FOR TRANSFORMER INDUSTRY IN INDIA

T&D network upgradation & strengthening

Investments in T&D sector by Central Transmission Utility and State Transmission Utilities

1. UPCOMING & PLANNED SUBSTATION PROJECTS IN DIFFERENT STATES OF INDIA

13. DEMAND OUTLOOK FOR POWER & DISTRIBUTION TRANSFORMER TILL 2020

Capex planned across the industry and utilities segment

Segmentation of projected demand by transformer rating, transformer operating voltage levels, transformer type

Segmentation of demand by different states of India

14. EMERGING NEW OPPORTUNITY IN TRANSFORMER INDUSTRY

Transformer Condition Monitoring System
Hermetically Sealed Transformer
Retrofit & Refurbishment

15. PURCHASE PROCESS

SEB's / Public Utilities
Private utilities
Industry

16. ANNEXURE:

State Electricity board and Utilities in India
State wise Power set up in India
Installed base of Transformers in India
Procurement of Transformers across electricity boards
Distribution Transformer rating and type in use
Purchase process – SEB's / Public Utilities
Purchase process – Private utilities
Industry wise transformer usage, purchase practice and future demand projection

1. CEMENT INDUSTRY

2. PHARMACEUTICAL

3. TEXTILE INDUSTRY

4. OIL & GAS

5. STEEL INDUSTRY

6. PAPER INDUSTRY

7. INDIAN SUGAR INDUSTRY

8. MALLS IN INDIA

9. IT/ITES INDUSTRY

10. AIRPORTS

Dry Transformer Industry

Overview & Current Market

Product offerings of major suppliers in India

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