

Renewable Energy Market in India 2021

<https://marketpublishers.com/r/RFFF1654F4A3EN.html>

Date: January 2022

Pages: 76

Price: US\$ 950.00 (Single User License)

ID: RFFF1654F4A3EN

Abstracts

Rapid urbanization has fuelled power requirements for the smooth functioning of modern lifestyle. There is a spurt in the demand for renewable energy with the gradual exhaustion of conventional electricity generation methods such as thermal power. In India, solar and wind are the most popular renewable energy sources. The Ministry of New and Renewable Energy (MNRE) regulates the market. Some of the major producers are Adani Power Limited, The Tata Power Company Limited, ReNew Energy Global Plc, and JSW Energy Limited.

Market insights:

In 2021, investment in the renewable energy market picked up during the April – September period, reaching ~INR 1.00 Trn. The cumulative installed renewable energy capacity (excluding large hydro) stood at 92.54 GW by January 2021. It is expected to increase in the coming years, with a 13.15% growth rate between 2021 and 2026. The government has undertaken various schemes and programs to increase capacity and promote growth of renewable energy.

Segment insights:

The market is segmented into solar, wind, small hydro, and biopower. In FY 2020, India ranked fourth in the wind and renewable power and fifth in solar power installed capacity. Solar power capacity has increased by more than 15 times in the last seven years. The government widely promotes wind power projects around the country with the help of several private sector investments. The ministry is promoting efficient designs of water mills for mechanical utility and electricity generation and setting up micro hydel projects up to 100 KW for remote village electrification. About 32% of the primary energy is derived from biomass and a large number of the population is dependent on it.

COVID-19 impact analysis:

During the pandemic, the renewable energy sector was hit by multiple demand and supply shocks. However, the impact on the renewable power sector was relatively mild as the government announced a series of relief measures during the 2020 – 2021 period. The demand from commercial and industrial (C&I) consumers had declined by about 18% during the 2020 – 2021 period, while that of residential consumers increased by 5% – 7%. The overall drop in power demand led to a slowdown in the market's growth. Hence the government introduced various policy measures including tenders, power project construction, and expansion plans to mitigate the impact of COVID-19.

Contents

CHAPTER 1: EXECUTIVE SUMMARY

CHAPTER 2: SOCIO-ECONOMIC INDICATORS

CHAPTER 3: INTRODUCTION

- 3.1. Market definition and structure
- 3.2. Government organizations that control the renewable energy market

CHAPTER 4: MARKET OVERVIEW

- 4.1 Renewable energy market in India – An overview
 - 4.1.1. Renewable energy installed capacity and growth forecast (2019 – 2026e)
 - 4.1.2. Share of renewable energy in total installed power capacity (2020 and 2026)

CHAPTER 5: MARKET SEGMENTATION

- 5.1. Share of different segments in RE installed capacity (as of May 2021)
- 5.2. Target of capacity share of different segments by end of 2022
- 5.3. Solar power capacity (2020)
- 5.4. Wind power capacity (2020)
- 5.5. Bio power capacity (2020)
- 5.6. Small hydro power capacity (2020)

CHAPTER 6: GOVERNMENT INITIATIVES

- 6.1. Government initiatives

CHAPTER 7: IMPACT OF COVID-19

- 7.1. Impact of COVID-19

CHAPTER 8: MARKET INFLUENCERS

- 8.1. Key growth drivers
- 8.2. Key challenges

CHAPTER 9: COMPETITIVE LANDSCAPE

9.1. Adani Power Limited

Company information

Business description

Products/Services

Key people

Financial snapshot

Key ratios

Key financial performance indicators

Key business segments

Key geographic segments

*Note: Similar information covered for all other public companies. Private companies' data given on a best-effort basis

9.2. Azure Power Global Limited

9.3. JSW Energy Limited

9.4. NTPC Limited

9.5. ReNew Energy Global Plc

9.6. Suzlon Energy Limited

9.7. The Tata Power Company Limited

9.8. Torrent Power Limited

9.9. Sembcorp Energy India Limited

9.10. GreenKo Group

CHAPTER 10: RECENT DEVELOPMENTS

10.1. Recent developments

CHAPTER 11: APPENDIX

11.1. Research methodology

11.2. About Netscribes

11.3. Disclaimer

COMPANIES PROFILED

Adani Power Limited

Azure Power Global Limited

JSW Energy Limited

NTPC Limited
ReNew Energy Global Plc
Suzlon Energy Limited
The Tata Power Company Limited
Torrent Power Limited
Sembcorp Energy India Limited
GreenKo Group

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