

Thorium (Nuclear Fuel) Market in India (2018-2023)

Share based on Power Resources (Thermal, Renewable, Hydro, Nuclear) Trade Analysis (Export-Import Data) Drivers, Challenges and Competitive Landscape

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Abstracts

The nuclear fuel market comprises of companies, industry associations, and governmental bodies which are involved in mining, refining, and storage of nuclear fuels and construction of nuclear reactors. The major application of nuclear fuels is in the nuclear reactor for sustaining a nuclear chain reaction required for generating electric energy. The nuclear fuels like uranium-235 and thorium-232 are radioactive metals which are fissile in nature.

Market insights:

India has one of the largest thorium deposits in the world with a capacity of ~360,000 tonnes. Thorium occurs in the form of a single isotope, Th-232, which degenerates at a very slow rate. The types of nuclear reactors, currently operating in the nuclear energy industry of India are pressurized heavy-water reactors (PHWR), and light-water reactors (LWR). There are 7 under-construction nuclear power reactors in the country which will generate a capacity of 5,400 Mwe. As of FY 2017, nuclear power contributed only ~2% of the total power generated in India. The main monazite reserves in India are present in West Bengal, Jharkhand, Odisha, Tamil Nadu, Kerala, Andhra Pradesh, Maharashtra, and Gujarat.

Export-Import:

Both export and import of thorium compounds have increased in India, in terms of value

and volume during FY 2015-FY 2018. The largest export destination of Indian thorium compounds is the United States (U.S.). The highest amount of thorium, based on value and volume, is imported in India from Kazakhstan.

Investments:

Apart from the domestic firms, there are a number of foreign companies which have shown interest to participate in India's nuclear power projects in the form of technology partners, suppliers, contractors, and service providers. Westinghouse Electric Company (WEC) and GE Hitachi in the U.S., and Electricite de France (EDF) in France and Russia are the two major contributors.

Key growth drivers of the market:

With an increase in GDP, the country is showing growth in terms of construction, manufacturing, and public services. With such attractive opportunities, India is set to become a global manufacturing hub. This, in turn, is supposed to increase the demand for nuclear power in the future.

India has promised to reduce the intensity of greenhouse emissions by 33-35% by the year 2030 from 2005. This initiative is expected to achieve ~40% electric power installed capacity from non-fossil fuel and nuclear-based energy resources by 2030.

Key deterrents to the growth of the market:

With the expanding civilian nuclear energy programs, weak export controls of nuclear fuels, and zones of domestic instability, the Indian nuclear power industry requires to implement stronger nuclear security policies. But the country is lagging in this area due to weak regulation of the nuclear sector.

India has the world's largest thorium reserve, but the thorium three stage reactor is still under development, which makes it impossible for India to use its thorium reserve shortly.

Companies covered:

Larsen & Toubro Limited

Walchandnagar Industries Limited

Bharatiya Nabhikiya Vidyut Nigam

Electronics Corporation of India Limited

India Rare Earth Limited

Nuclear Fuel Complex

Nuclear Power Corporation of India Limited

Uranium Corporation of India Limited

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