

India Power Market Forecast 2014-2023

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Abstracts

The first edition of the 'India Power Market Forecast 2014-2023' evaluates the major commercial, policy and supply chain related constraints and challenges facing India's power sector over the next decade and the opportunities that this presents. With insufficient generation capacity, a history of project delays and missed government capacity additions targets, as well as severe problems with the transmission and distribution networks, India's power market faces many challenges. Specific issues with insufficient domestic coal and gas supplies, land acquisition, skilled labour constraints, public opposition, government tariff policy and the financial health of SEBs are all presenting significant hurdles to timely project execution and undermining the bankability of PPA agreements. In light of this, the report analyses the key market trends and dynamics, identifies opportunities throughout the major power sector value chains, evaluates and compares project economics and presents forecasts for capacity additions and associated capital expenditure for each power technology type over the period 2014-2023, with data for 2004-2013 shown for comparative purposes.

Contents

1 INTRODUCTION

- 1.1 About this Report
- 1.2 Report Structure
- 1.3 Who Should Buy This Report?
- 1.4 Precergy India Power Market Expertise

2 EXECUTIVE SUMMARY & CONCLUSIONS

- 2.1 India Power Market Introduction & Overview
- 2.2 Major Market Constraints & Issues
- 2.3 Key Trends, Challenges & Opportunities in Main Sectors
- 2.4 India Power Market Forecasts

3 MACRO MARKET TRENDS & DRIVERS

- 3.1 Primary Energy Supply-Demand Drivers
- 3.2 Energy Supply-Demand by Fuel Type
- 3.3 Electricity Supply-Demand Drivers
- 3.4 Fuel Prices & Exchange Rates
- 3.5 Climate Change Drivers & Key Environmental Policy
- 3.6 Energy Supply Security and Related Policy in India & Globally

4 INDIA POWER MARKET OVERVIEW

- 4.1 India Power Industry History and Development in Brief
- 4.2 Government Power Market Regulatory Bodies
- 4.3 Current Market Structure
- 4.4 India Electricity Capacity Development History
- 4.5 Missed Capacity Installation Targets – Explanation & Consequences
- 4.6 India Installed Capacity by Ownership
- 4.7 India End-User Electricity Consumption
- 4.8 India Peak Electricity Demand Deficit
- 4.9 India Transmission & Distribution Infrastructure – Current Situation, Plans and Issues
- 4.10 The Role & Importance of Coal Mine Linkages
- 4.11 Current Shortages & the Future Role of Imported Coal

- 4.12 The Role of Captive Power in the Indian Power Market – Proliferation, Key Legislation, and Issue
- 4.13 Carbon Capture & Storage (CCS) Potential in India
- 4.14 Renovation versus Decommissioning of Aging Plants
- 4.15 12th 5-Year Plan and Longer-Term Government Targets

5 PROJECT ECONOMICS & FOREIGN INVESTMENT

- 5.1 Overview of Electricity Tariffs & Policy in India
- 5.2 Coal Project Capital Costs, Tariffs & Economics
- 5.3 Gas Project Capital Costs, Tariffs & Economics
- 5.4 Nuclear Project Capital Costs, Tariffs & Economics
- 5.5 Hydro Project Capital Costs, Tariffs & Economics
- 5.6 Wind Project Capital Costs, Tariffs & Economics
- 5.7 Solar PV Project Capital Costs, Tariffs & Economics
- 5.8 Biomass Project Capital Costs, Tariffs & Economics
- 5.9 Levelised Cost of Energy & Project Economics Analysis
- 5.10 Key Legislation and Policy Governing Foreign Direct Investment and Participation in the Power Sector in India
- 5.11 Trends in Foreign Direct Investment

6 VALUE CHAIN ANALYSIS

- 6.1 Coal Supply Chain Overview, Constraints & Key Issues
- 6.2 Gas Supply Chain Overview, Constraints & Key Issues
- 6.3 Nuclear Supply Chain Overview, Constraints & Key Issues
- 6.4 Hydro Supply Chain Overview, Constraints & Key Issues
- 6.5 Wind Supply Chain Overview, Constraints & Key Issues
- 6.6 Brief Overview of Solar PV Market Value Chain
- 6.7 Brief Overview of Solar Thermal Market Value Chain
- 6.8 Brief Overview of Biomass Market Value Chain
- 6.9 Brief Overview of Wave & Tidal Market Value Chain
- 6.10 Supply Chain – Industry Survey

7 COMPANY PROFILES

- 7.1 Major Utility: NTPC
- 7.2 Major Utility: NHPC
- 7.3 Major Utility: Damodar Valley Corporation

- 7.4 Major Utility: NPCIL
- 7.5 Major Utility: APGENCO
- 7.6 Major Utility: Mahagenco
- 7.7 Major Utility: Adani Power
- 7.8 Major Utility: Essar Energy
- 7.9 Major Utility: Reliance Power
- 7.10 Major Utility: Tata Power
- 7.11 Major Fuel Supplier: Coal India Limited (CIL)
- 7.12 Major Equipment Manufacturer: BHEL
- 7.13 Major Equipment Manufacturer: Suzlon Energy

8 PROSPECTIVE PROJECTS DATA

- 8.1 Selected Prospective Coal Power Projects
- 8.2 Selected Prospective Gas Power Projects
- 8.3 Selected Prospective Nuclear Power
- 8.4 Selected Prospective Hydro Power Projects

9 MARKET FORECASTS

- 9.1 Introduction to the Forecasting Process
- 9.2 Forecast Model & Assumptions
- 9.3 Power Consumption & Capacity Demand Forecasts 2014-2028
- 9.4 Overall India Power Market Forecasts 2014-2023
- 9.5 Coal Power Market Forecasts 2014-2023
- 9.6 Gas Power Market Forecasts 2014-2023
- 9.7 Nuclear Power Market Forecasts 2014-2023
- 9.8 Hydro Power Market Forecasts 2014-2023
- 9.9 Onshore Wind Power Market Forecasts 2014-2023
- 9.10 Offshore Wind Power Market Forecasts 2014-2023
- 9.11 Solar PV Power Market Forecasts 2014-2023
- 9.12 Solar Thermal Power Market Forecasts 2014-2023
- 9.13 Biomass Power Market Forecasts 2014-2023
- 9.14 Wave & Tidal Power Market Forecasts 2014-2023
- 9.15 Oil & Other Technologies Power Market Forecasts 2014-2023

10 APPENDICES

- 10.1 Model Assumptions & Forecast Project Data Quality

10.2 Disclaimer

List Of Figures

LIST OF FIGURES

Figure 1: Total Capacity Additions by Fuel Type 2004-2023

Figure 2: Total Expenditure by Fuel Type 2004-2023

Figure 3: Current & Future Global Primary Energy Demand

Figure 4: Current & Future Population & Energy Demand

Figure 5: Energy Demand & GDP Relationships

Figure 6: Global and India Coal Production & Consumption

Figure 7: Global and India Gas Production & Consumption

Figure 8: Global and India Oil Production & Consumption

Figure 9: Nuclear Power Consumption History & Outlook

Figure 10: Global Electricity Generation & India Share Thereof

Figure 11: Global & India Electricity Generation per Capita

Figure 12: Global Electricity Gen Forecast by Fuel Type to 2040

Figure 13: Oil, Coal, Gas and Uranium Prices

Figure 14: Rupee to USD Monthly Average 2000 to Present

Figure 15: CO2 Emissions from Energy Consumption

Figure 16: India Primary Energy Production & Consumption

Figure 17: Current Structure of India Electricity Market

Figure 18: India Power Generation Capacity by Fuel Type Year-End 1980-2012

Figure 19: Percentage Breakdown of India's Capacity by Fuel Type Year-End 2003 and 2012

Figure 20: Capacity Installation Targets and Achievements FY2007 to FY2012

Figure 21: Overall Power Capacity by Owner Type – Sep 2005 and Sep 2013

Figure 22: Coal Power Capacity by Owner Type – Sep 2005 and Sep 2013

Figure 23: Gas Power Capacity by Owner Type – Sep 2005 and Sep 2013

Figure 24: Hydro Power Capacity by Owner Type – Sep 2005 and Sep 2013

Figure 25: Nuclear Power Capacity by Owner Type – Sep 2005 and Sep 2013

Figure 26: Wind Power Capacity by State Location End-February 2013

Figure 27: India Electricity Consumption by End-User FY1981-2012

Figure 28: Percentage Breakdown of India's End-User Consumption FY2002 and FY2012

Figure 29: India Electricity Peak Demand Deficit FY2002-2013

Figure 30: Peak Electricity Demand Deficit in India by Region FY2013

Figure 31: India Transmission Network – Existing, Approved and Planned to 2017

Figure 32: Electricity Transmission & Distribution Losses in India FY1980-2012

Figure 33: Transmission Lines Installed (ckm)

Figure 34: Terminal & Substation Capacity Installed (MVA or MW)

Figure 35: Monthly Coal Stocks at Coal Power Plants March 2008 to September 2013

Figure 36: CIL Coal Production Growth versus Growth in Coal Power Capacity
FY2001-2013

Figure 37: Percentage Breakdown of CPP Capacity by Fuel Type March 2013

Figure 38: Comparison of Electricity Production Costs for Selected CCS Options (2002)

Figure 39: Operational Coal Power Units Built Prior to 1990 by Unit Capacity

Figure 40: 12th 5-Year Plan Capacity Additions Targets by Fuel Types

Figure 41: India Long-Term Capacity and Consumption Targets 2011 to 2052

Figure 42: Coal Capital Costs, Tariffs & Economics Charts

Figure 43: Gas Capital Costs, Tariffs & Economics Charts

Figure 44: Nuclear Capital Costs, Tariffs & Economics Charts

Figure 45: Hydro Capital Costs, Tariffs & Economics Charts

Figure 46: Wind Capital Costs, Tariffs & Economics Charts

Figure 47: Solar PV Capital Costs, Tariffs & Economics Charts

Figure 48: Biomass Capital Costs, Tariffs & Economics Charts

Figure 49: Levelised Cost of Energy for Different Power Technologies in India 2013

Figure 50: Total and Power Sector Foreign Direct Investment FY2003-FY2013

Figure 51: Origin Country % Share of Non-Financial FDI in India in FY2013

Figure 52: Coal Power Project Equipment & EPC Supply Chain Map

Figure 53: Gas Power Project Equipment & EPC Supply Chain Map

Figure 54: Nuclear Power Project Equipment & EPC Supply Chain Map

Figure 55: Hydro Power Project Equipment & EPC Supply Chain Map

Figure 56: Wind Turbine Manufacturers Active in India

Figure 57: NTPC Financial Performance

Figure 58: NTPC Market Performance

Figure 59: NHPC Financial Performance

Figure 60: NHPC Market Performance

Figure 61: DVC Financial Performance

Figure 62: DVC Market Performance

Figure 63: NPCIL Financial Performance

Figure 64: NPCIL Market Performance

Figure 65: APGENCO Financial Performance

Figure 66: APGENCO Market Performance

Figure 67: Mahagenco Financial Performance

Figure 68: Mahagenco Market Performance

Figure 69: Adani Power Financial Performance

Figure 70: Adani Power Market Performance

Figure 71: Essar Energy Financial Performance

- Figure 72: Essar Energy Market Performance
- Figure 73: Reliance Power Financial Performance
- Figure 74: Reliance Power Market Performance
- Figure 75: Tata Power Financial Performance
- Figure 76: Tata Power Market Performance
- Figure 77: CIL Financial Performance
- Figure 78: CIL Market Performance
- Figure 79: BHEL Financial Performance
- Figure 80: BHEL Market Performance
- Figure 81: Suzlon Financial Performance
- Figure 82: Suzlon Market Performance
- Figure 83: Modelling Process Diagram
- Figure 84: India Electricity Consumption Forecast by End-User FY2004-FY2029
- Figure 85: India Electricity Total Capacity Demand Forecast 2004-2028
- Figure 86: Total Cumulative Installed Capacity by Fuel Type 2004-2023
- Figure 87: Total Capacity Additions by Fuel Type 2004-2023
- Figure 88: Total Expenditure by Fuel Type 2004-2023
- Figure 89: Coal Capacity Additions by Unit Size 2004-2023
- Figure 90: Percentage Breakdown of Coal Capacity Additions by Unit Size 2004-2013 and 2014-2023
- Figure 91: Coal Expenditure by Unit Size 2004-2023
- Figure 92: Percentage Breakdown of Coal Capex by Unit Size 2004-2013 and 2014-2023
- Figure 93: Coal Expenditure Breakdown by Component 2004-2023
- Figure 94: Gas Capacity Additions by Unit Size 2004-2023
- Figure 95: Percentage Breakdown of Gas Capacity Additions by Unit Size 2004-2013 and 2014-2023
- Figure 96: Gas Expenditure by Unit Size 2004-2023
- Figure 97: Percentage Breakdown of Gas Capex by Unit Size 2004-2013 and 2014-2023
- Figure 98: Gas Expenditure Breakdown by Component 2004-2023
- Figure 99: Nuclear Capacity Additions by Type 2004-2023
- Figure 100: Nuclear Expenditure by Type 2004-2023
- Figure 101: Total Nuclear Expenditure Breakdown by Component 2004-2023
- Figure 102: Hydro Capacity Additions by Type 2004-2023
- Figure 103: Percentage Breakdown of Hydro Capacity Additions by Type 2004-2013 and 2014-2023
- Figure 104: Hydro Expenditure by Type 2004-2023
- Figure 105: Percentage Breakdown of Hydro Capex by Type 2004-2013 and 2014-2023

- Figure 106: Conventional Hydro Expenditure Breakdown by Component 2004-2023
- Figure 107: Pumped Storage Expenditure Breakdown by Component 2004-2023
- Figure 108: Onshore Wind Capacity Additions 2004-2023
- Figure 109: Onshore Wind Expenditure Breakdown by Component 2004-2023
- Figure 110: Offshore Wind Capacity Additions 2004-2023
- Figure 111: Offshore Wind Expenditure Breakdown by Component 2004-2023
- Figure 112: Solar PV Capacity Additions 2004-2023
- Figure 113: Solar PV Expenditure Breakdown by Component 2004-2023
- Figure 114: Solar Thermal Capacity Additions 2004-2023
- Figure 115: Solar Thermal Expenditure Breakdown by Component 2004-2023
- Figure 116: Biomass Capacity Additions 2004-2023
- Figure 117: Biomass Expenditure Breakdown by Component 2004-2023
- Figure 118: Wave & Tidal Capacity Additions 2004-2023
- Figure 119: Wave & Tidal Expenditure Breakdown by Component 2004-2023
- Figure 120: Oil & Other Technologies Capacity Additions 2004-2023
- Figure 121: Oil & Other Technologies Expenditure Breakdown 2004-2023
- Figure 122: Base Case Capacity Additions Forecast Project Data Quality 2004-2023
- Figure 123: Industry Consumption Regression Model v Actual Data
- Figure 124: Traction & Railways Consumption Regression Model v Actual Data
- Figure 125: Agriculture Consumption Regression Model v Actual Data
- Figure 126: Commercial Consumption Regression Model v Actual Data
- Figure 127: Residential Consumption Regression Model v Actual Data
- Figure 128: 'Other' Consumption Regression Model v Actual Data
- Figure 129: Non-Utilities Consumption Regression Model v Actual Data

About

With insufficient generation capacity, a history of project delays and missed government capacity additions targets, as well as severe problems with the transmission and distribution networks, India's power market faces many challenges. In light of this, the 'India Power Market Forecast 2014-2023', released in February 2014 by energy business experts Precergy, analyses the key market trends and dynamics, identifies opportunities throughout the major power sector value chains, evaluates and compares project economics and presents forecasts for capacity additions and associated capital expenditure for each power technology type over the period 2014-2023.

The report forecasts a total of \$357 billion to be spent installing 269GW of capacity additions over the next ten years (2014-2023). However, growth and investment continues to be impacted by key issues such as insufficient domestic coal and gas supplies, land acquisition, skilled labour constraints, public opposition, government tariff policy and the financial health of SEBs – all of which are presenting significant hurdles to timely project execution and undermining the bankability of PPA agreements.

Commenting on the market report, Precergy Managing Director Adrian John said "The Indian power market has consistently failed to meet government capacity targets, which along with fuel supply shortages and T&D network weaknesses has led to significant electricity supply shortages and blackouts in recent years. These shortages have undoubtedly affected broader economic growth and development and addressing these issues has become a government priority and driver of policy. Nonetheless reforms have been slow and investment levels insufficient to have any meaningful impact on the current situation. Consequently, the Indian power sector remains a difficult investment environment, but selective opportunities certainly still exist throughout the major power sector value chains."

Discussing the reports forecasts and methodologies Mr. John went on to say, "The report's forecasts are based on a the scrutiny of over 180,000 items of data from our comprehensive in-house India projects database that includes over 3,100 projects that are currently at various stages of development (i.e. under construction, planned, proposed etc.) and total over 1,000GW of capacity. We believe the report's level of depth and detail provides our readers with both an essential and rich source of information, and the confidence to utilise the report's forecasts and findings to support key business investment and growth strategies."

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