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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.

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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 the 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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