

Industrial Compressors Industry in India 2014-19

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Abstracts

ValueNotes presents a research report on the industrial compressors industry in India. This industry report covers intelligence on the market size, growth, industry trends, industry attractiveness, and Porter's analysis. The report covers fiscal years 2014 through 2019.

Industrial compressors industry is used to create a high pressure for functioning heavy machines in industries such as cement, steel, oil & gas, petroleum, textile, etc. Industrial compressors can be classified into reciprocation, centrifugal and screw compressors. Screw compressors are highest selling compressors in India followed by centrifugal compressors. Centrifugal compressors are slowly replacing screw compressors because of their higher energy efficiency, high level of compression and noise free operations.

Many expansion projects, which are in the pipeline in the oil & gas, cement and steel industries, will be executed in the next 4-5 years and this will generate overall demand for industrial compressors in India.

Key Findings:

The industrial compressors industry in India, currently valued at INR 33bn (~USD 550mn) in FY 2014, has been growing at a CAGR of ~7% for the last three years. ValueNotes estimates that the industry will be worth approximately INR 50bn (~USD 833 million) by FY 2019, growing at CAGR of ~9%

Though screw compressors have captured 50% of the overall industrial compressors market (by value) in India, centrifugal compressors are currently in a state of growth with 30% of the market (by value). In the future, centrifugal compressors will have a ~38% share of the overall industrial compressors

market (by value).

Growth in the steel, power, oil & gas and cement industries are generating demand for industrial compressors

Emerging industries like geo thermal and waste heat will boost the demand for industrial compressors

The report includes profiles of the top-5 players with a brief overview about their service offerings, key financial ratios, expansion strategies, etc.

Contents

1 . EXECUTIVE SUMMARY

2. INDUSTRY STRUCTURE

Industry Structure
Industry Evolution
Industry Definition
Industry Classification
Industry Supply Chain

3. MARKET OVERVIEW

Size & Growth
Market Segmentation
Industry Segmentation | Types of Compressors
Centrifugal Compressors Consumption by End Industry
Screw Compressors Consumption by End Industry
Reciprocating Compressors Consumption by End Industry
Geographical Analysis

4. DRIVERS & INHIBITORS

Driver 1 - End User Industries are Growing
Driver 2 - Awareness of Energy Efficiency Measures
Driver 3 - Emergence of New Industries
Inhibitor 1- Delay in Setup/Approvals
Inhibitor 2 - Rising Raw Material Cost
Inhibitor 3 -Threat from Low Cost Imports

5. INDUSTRY TRENDS

Recent Trends Witnessed

6. MERGERS & ACQUISITIONS AND RECENT DEVELOPMENTS

7. INDUSTRY ANALYSIS

Porter's Analysis
Industry Attractiveness

8. COMPETITIVE ENVIRONMENT

Industry Segmentation | Organized vs Unorganized
Industry Segmentation | Imports
Brand Positioning
Manufacturing Landscape
Competitor Benchmarking

9. PROFILES OF KEY PLAYERS

Atlas Copco (India) Limited
Elgi Equipments Limited
Ingersoll Rand (India) Limited
Kirloskar Pneumatic Company Limited
Kaeser Compressors (India) Private Limited

10. ANNEXURE

Status of Stalled and New Projects in India
Projects Stalled in India: By Ownership
Projects Stalled in India by Sector and Top Five States in India by Project Loss
(2013-14)
Fresh Project Investment in India: By Ownership
Fresh Projects Investment in India by Sector and Top Five States in India by Investment
in Fresh Projects
10.2. Research Methodology
10.3. Abbreviation & Bibliography
10.4. Glossary

About

- With a growth in steel, power, oil & gas and cement industries in India, and the emergence of industries like waste heat and geothermal, the application of industrial compressors will increase
- The total market for industrial compressors is valued at INR 33 billion in FY 2014, of which the top players, such as Atlas Copco and Ingersoll Rand, accounted for 85% of the market share
- The market is expected to grow at a CAGR of 9%, to reach INR 50 billion in FY 2019

June 2014: Multinational companies used to distribute industrial compressors through vendors in India in the early 1900s. The first reciprocating compressors manufacturing plant was established in the country in 1965 by Ingersoll Rand. Since then, India's industrial compressors industry has come a long way. The total market was valued at INR 33 billion in FY 2014 and is expected to grow at a CAGR of 9%, to reach INR 50 billion in FY 2019.

Almost 85% of the overall industrial compressors market is organized. The market is dominated by companies like Atlas Copco, Ingersoll Rand, Elgi Equipments and Kirloskar Pneumatic.

According to Nitin Patkar, a research analyst at ValueNotes, "The industrial compressors industry in India is dependent on the growth in the cement, steel, oil & gas and power industries. Many projects in these industries are in the pipeline expecting to receive clearances in the next five years." He added, "There will be an emergence of waste heat and geo thermal energy in India. As a result, the industrial compressors industry will see a noticeable growth in the near future."

Screw compressors have a major market share of industrial compressors, and they will continue to dominate in the future as well. Centrifugal compressors, the next generation compressors, are expected to witness the highest growth as they are more energy efficient and have a noise-free operation. They are expected to contribute to ~38% of the market.

45% of the total value of industrial compressors sold in India is imported. Germany, USA and China are the top exporters to India.

The ValueNotes report, titled Industrial compressors Industry in India: 2014-2019, takes a look at the industry including the current market size and growth, the drivers and challenges for growth, the competitive landscape, an analysis of the industry for investor attractiveness, and Porter's 5 Forces. Key market trends discussed indicate the opportunities and challenges for industry players.

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