

Switchgear & Control Gear Industry in India - 2013-2017

<https://marketpublishers.com/r/SB3410E5C47EN.html>

Date: December 2013

Pages: 56

Price: US\$ 250.00 (Single User License)

ID: SB3410E5C47EN

Abstracts

ValueNotes latest research report on the switchgear and control gear industry in India covers intelligence on the market size, growth, industry trends, industry attractiveness, and Porter's analysis. The report covers fiscal years 2013 through 2017. India is the fifth largest producer and consumer of electricity in the world, but according to the 11th five year plan, the country was only able to achieve 69% of the planned capacity of 78,700 MW. In order to overcome this demand and supply deficit, the Indian government has gradually increased the planned capacity addition in the years to come. The rising demand in the power capacity addition is marginally boosting the demand for distribution machinery such as switchgears and control gears.

Key Findings:

The switchgear and control gear industry in India is currently valued at INR 135bn (~USD 2billion) in FY 2013 and has been growing at ~15% for the last three years. ValueNotes estimates that the industry will be worth approximately INR 215bn (~USD 3.5billion) by FY 2017, growing at a diminished CAGR of ~10%.

Low voltage switchgears, which account for more than 55% of the total market, has a higher share of unorganized players and it is anticipated to increase in the coming years. The forward integration of these unorganized players to medium and high voltage segments can lead to an increase in the unorganized market share in these segments too, which is currently dominated by five or six players.

Increased planned capacity addition in the power sector and improvement in technology along with government directives to replace old redundant machinery

is creating a replacement demand in the switchgear segment

The report includes profiles of the top five players - ABB Ltd, Alstom T&D India, Bharat Heavy Electricals Ltd (BHEL), Crompton Greaves, Schneider Electric India - with a brief overview about their service offerings, key financial ratios, expansion strategies, etc.

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About

India is the fifth largest producer and consumer of electricity in the world. According to the 11th five year plan, the country was only able to achieve 69% of its planned capacity of 78,700 MW. To overcome the demand and supply deficit, the Indian government has gradually increased the planned capacity addition in the years to come. Despite this, there has only been a marginal boost to the demand for distribution machinery such as switchgears and control gears.

The switchgear and control gear industry in India, currently accounting for ~10% of the overall electrical equipment sector, was valued at INR 135 billion (~USD 2 billion) in FY2013. ValueNotes estimates that the industry will be worth approximately INR 215 billion (~USD 3.5 billion) by FY 2017 - a slower CAGR of ~10%, compared to 15% between FY2010-FY2012. This diminished growth is due to an increase in cheap imports, an uncertainty and delay in the implementation of power reforms, and the lack of adoption of international standards in manufacturing by local players.

“The rise in imports especially in low voltage switchgears is the biggest challenge that Indian players are facing, along with the entry of sub-contractors with limited technical know-how,” says Tejaswee Shrestha, research analyst at ValueNotes. “The lack of standard specification also has resulted in the overall reduction of exports by ~10% in the past year,” she adds.

Low voltage switchgears, which accounts for more than 55% of the total market, has a higher share of unorganized players and it is anticipated to increase in the coming years. The forward integration of these unorganized players to medium and high voltage segments can lead to an increase in the unorganized market share in these segments too, which is currently dominated by five or six players.

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