

POWER EQUIPMENT MARKET IN INDIA

Demand Outlook and Projections (2016-21)

- ❖ Research Report
- ❖ Project Database (Excel)

Table of Contents

SECTION A: POWER SECTOR TRENDS AND DEVELOPMENTS

1. Sector Trends and Outlook

- ❖ Sector Size and Growth
- ❖ Key Trends in Generation
- ❖ Key Trends in Transmission
- ❖ Key Trends in Distribution
- ❖ Capacity Addition Estimates
- ❖ Fuel Trends
- ❖ Issue and Challenges

2. Key Recent Developments

- ❖ Capacity Addition
- ❖ Government Initiatives and Programmes
- ❖ Policy and Regulatory Developments
- ❖ Fuel-related Developments
- ❖ New Manufacturing Facilities
- ❖ Conclusion

SECTION B: GENERATION EQUIPMENT DEMAND AND OUTLOOK

3. BTG Equipment

- ❖ Demand Drivers
- ❖ Trends in Thermal Power Capacity
- ❖ Projections for Thermal Power Capacity (2016-21)
- ❖ Demand for Boilers by Unit Size (2016-21)
- ❖ Demand for TG Sets by Unit Size (2016-21)
- ❖ Manufacturing Capacity
- ❖ Future Outlook

4. Hydro Power Equipment

- ❖ Growth Drivers
- ❖ Installed Capacity
- ❖ Hydro Power Potential
- ❖ Projected Capacity Addition
- ❖ Projections in Demand for Hydro Power Turbines
- ❖ Projections in Demand for Hydro Power Generators
- ❖ Outstanding Orders
- ❖ Key Players

5. Thermal BoP Equipment

- ❖ Introduction
- ❖ Demand Drivers
- ❖ Projections for Thermal Power Capacity (2016-21)
- ❖ Demand for BoP Equipment
 - Coal Handling Plants
 - Ash Handling Plants
 - DM Water Plants
 - Cooling Towers
- ❖ Summing Up

SECTION C: T&D EQUIPMENT DEMAND AND OUTLOOK

6. Conductors

- ❖ Demand Drivers
- ❖ Technology Trends
- ❖ Key Indian Players
- ❖ Trends in Transmission Line Length
- ❖ Projections for Transmission Line Length (2016-21)
- ❖ Demand for Conductors (2016-21)

7. Transmission Towers

- ❖ Product and Technology Trends
- ❖ Key Indian Players
- ❖ Projections for Transmission Line Length
- ❖ Demand for Transmission Towers (2016-21)

8. Transformers

- ❖ Product and Technology Trends
- ❖ Trends in Transformer Capacity
- ❖ Projections for Transformer Capacity (2016-21)
- ❖ Demand for Transformers by Voltage (2016-21)

9. Insulators

- ❖ Product and Technology Trends
- ❖ Market Trends
- ❖ Projections for Transmission Line Length (2016-21)
- ❖ Demand for Insulators by Voltage (2016-21)

10. Switchgear

- ❖ Product and Technology Trends
- ❖ Projections for Substation Additions
- ❖ Demand for Switchgear by Voltage (2016-21)

11. Energy Meters

- ❖ Product and Technology Trends
- ❖ Metering Scenario in India
- ❖ Demand for Meters (2016-21)
 - DT Meters
 - Consumer Meters

SECTION D: RENEWABLE ENERGY EQUIPMENT DEMAND AND OUTLOOK

12. Solar Power Equipment Overview

- ❖ Size and Growth
- ❖ Demand Drivers
- ❖ MNRE's Targets for Solar Power Capacity
- ❖ Projections for Solar Power Capacity Additions
- ❖ CERC-determined Capital Costs of Solar PV Projects
- ❖ Demand Projections for Solar Power Equipment
 - Modules
 - Inverters
 - Mounting Structures
- ❖ Technology Trends

13. Wind Power Equipment Overview

- ❖ Size and Growth
- ❖ Demand Drivers
- ❖ Projections for Wind Power Capacity Additions
- ❖ CERC-determined Capital Costs of Wind Energy Projects
- ❖ Cost Breakdown
- ❖ Projected Demand for Wind Power Equipment
 - Towers and Blades
 - Drives and Motors
- ❖ Technology Trends

List of Tables and Figures

List of tables

Region-wise Energy and Peak Deficit in 2015-16 (%)
Capacity Addition Estimates (MW)
Trend in Gas Demand and Supply
Capacity Addition: Generation
Capacity Addition: Transmission
Source-wise Achievement versus Target (in GW)
Progress under IPDS
Sanctions under DDUGJY (as of February 2016)
Revised Emission Standards for Coal-based Power Plants (mg per Nm³)
Coal Block Auctions
Coal-based Capacity Addition Estimates (MW)
Projected BTG Demand for Coal-based Capacity
Projected BTG Demand by Unit Size - 2016-17 to 2020-21
Present Manufacturing Capacity of Key BTG Suppliers
Installed Hydro Power Generation Capacity - By Region (MW)
Region-wise Hydro Power Potential (As of January 2016)
River-basin-wise Hydro Power Potential (As of January 2016)
Hydro Power Potential for Select States (MW)
Trend in Hydro Power Capacity and Generation Performance
Company-wise Outstanding Order-book for HEPs (As of September 2015)
Company-wise Outstanding Order-book for HEPs (As of September 2015)
Company-wise Outstanding Order-book for HEPs (As of September 2015)
Coal-based Capacity Addition Estimates (MW)
Estimates for BoP Package Orders for Key Categories
Expected Growth in Transmission System till Thirteenth Plan
Proposed Transmission System under GEC-I
Number of Proposed Corridors under Desert Power Plan
Proposed infrastructure under IPDS
Outlay of select proposed work under IPDS
Proposed infrastructure under IPDS
Outlay of select proposed work under IPDS
Key Indian Players: Conductors
Projected Addition in Transmission Line Length (ct. km)
Norms for conductor weights (tonnes per ct. km)
Power Intensity at various Voltage Levels
Key Indian Players: Transmission Towers
Norms for Average Span and Number of Towers per km
Norms for Average Transmission Tower Weight (tonnes)
Voltage-wise Growth in Transformer Capacity
Transformer ratings used to estimate demand for transformers
Voltage-wise expected demand for transformers (number): Transmission segment
Voltage-wise expected demand for transformers (number): Distribution segment
Merits of Various Insulator Materials
Voltage-wise projected number of new substations and bays
Norms for estimating requirement for switchgear equipment
Metering Coverage of Discoms in 2014-15
Projected Demand for Power (BUs)
CERC Solar PV Plant Capital Cost Breakdown (Rs million per MW)
Share of Various Components in Total Project Costs
Share of Turbine Components in Total Project Costs

List of Figures

Year-Wise Growth in Installed Power Capacity
Trend in Fuel Mix
Year-wise growth in Transmission Line Length (Ct km)
Year-wise Growth in Transmission Substation Capacity (MVA)
Year-Wise Growth in Distribution Line Length
Year-wise Growth in Transformer Capacity of Distribution Sector
Year-Wise Growth in Energy Sales
Energy Demand vs. Availability Trend
Peak Demand vs. Peak Met Trend
Trends in Coal Demand and Supply
Year-wise Thermal Capacity Addition
Coal-based Installed Capacity Growth
Projected BTG Demand by Unit Size - 2016-17 to 2020-21
Trend in Installed Hydro Power Generation Capacity (GW)
Trend in Hydro Power Generation Capacity Addition (MW)
Long-term Trend in Share of Hydro Power in Total Capacity
Trend in Thermal/Hydro Mix
Expected Capacity Addition based on Project Pipeline versus 5-Year Moving Average
Projected Demand for Hydro Power Turbines
Projected Demand for Hydro Power Generators
Growth in Transmission Line Length (ct. km)
Voltage-wise transmission line length in 2015-16 (ct. km)
Ownership-wise share in the projected line length addition between 2016-17 and 2020-21
Voltage-wise Annual Demand for Conductor Length (km)
Voltage-wise Annual Demand for Conductors in terms of Weight (tonnes)
Power Intensity at various Voltage Levels
Ownership-wise Share in the Projected Line Length Addition between 2016-17 and 2020-21
Voltage-wise Annual Demand for Transmission Towers (No.)
Voltage-wise Annual Demand for Transmission Towers (tonnes)
Voltage-wise Growth in Transformer Capacity
Voltage-wise Projected Transformer Capacity Addition
Voltage-wise Projected Transformer Capacity Addition
Ownership-wise Share in the Projected Line Length Addition between 2016-17 and 2020-21
Voltage-wise Annual Demand for Insulators (number)
Expected Demand for Number of Circuit Breakers
Expected Demand for Number of Isolators
Expected Demand for Number of Lightening Arrestors
Expected Demand for Number of Wave Traps
Growth in Number of DT Meters ('000)
Growth in Number of Energy Meters ('000)
Projected Addition in Number of Energy Meters
Projected Addition in Number of DT Meters
Solar Power Capacity Growth
MNRE's Year-wise targets
Projections for Cumulative Solar Power Capacity
Projected Annual Demand for Solar Modules
Projected Demand for Inverters
Projected Annual Demand for Mounting Structures
Wind Power Capacity Growth
Wind Power Capacity Projections
CERC Capital Cost for Wind Energy Projects (Rs million per MW)
Share of Various Components in Total Project Costs
Projected Annual Demand - Towers
Projected Annual Demand - Blades
Projected Annual Demand - Drives and Motors
Changing Trend in Wind Turbine Models in India

I would like to purchase “**Power Equipment Market in India: Demand Outlook and Projections (2016-21)**” report:

Format (PDF)	Price	GST (18%)	Total
Site Licence (Single Location)	Rs 75,000	Rs 13,500	<input type="checkbox"/> Rs 88,500
Enterprise Licence (Multiple Locations)	Rs 112,500	Rs 20,250	<input type="checkbox"/> Rs 132,750

I am enclosing a cheque/demand draft for Rs _____, vide cheque/demand draft no. _____ drawn on _____ dated _____ in favour of “**India Infrastructure Publishing Pvt. Ltd.**”

Signature

.....

Name (BLOCK LETTERS) _____

Designation _____

Company _____

Mailing Address _____

Telephone _____ Mobile _____

Fax _____

E-mail _____

Wire transfer details:

Beneficiary : India Infrastructure Publishing Pvt. Ltd.
Bank Name : The Hongkong and Shanghai Banking Corporation Ltd.
Bank Address : R-47, Greater Kailash-1, New Delhi - 110048
Account No. : 094179587002
Swift Code : HSBCINBB
IFSC Code : HSBC0110006

Contact details:

Dhruba Jyoti Malkhandi
 Manager-Information Products
 India Infrastructure Publishing Pvt. Ltd.
 B-17, Qutab Institutional Area. New Delhi - 110 016. India
 Tel: +91 11 46012963, 41034600, 41034601
 Mobile: +91 8285580343 Fax: +91 11 2653 1196
 Email: dhruv.malkhandi@indiainfrastructure.com