

New Research Report

T&D EQUIPMENT MARKET PROJECTIONS IN INDIA 2019

Market Analysis, Growth Drivers, Outlook and Projections

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India Infrastructure Research

The transmission and distribution (T&D) equipment market is expected to witness a significant growth momentum over the next few years. The government's focus on renewables, last-mile connectivity under schemes such as 24x7 Power for All and Pradhan Mantri Sahaj Bijli Har Ghar Yojana (Saubhagya), augmentation of transmission lines to create green energy corridors, and system strengthening is expected to create new opportunities for T&D equipment and technology providers. These initiatives are expected to result in a significant uptick in demand for towers, cables, conductors and reactive power equipment. Further, smart metering has received a push from the government in recent years through programmes like the Integrated Power Development Scheme, the Ujwal Discom Assurance Yojana, the Smart Meter National Programme and smart grid pilot projects. Also, utilities are increasingly focusing on addressing challenges related to space and time constraints, safety concerns and asset failures through new substation, switchgear and transformer technologies by deploying smart digital solutions.

The T&D Equipment Market in India 2019 report will analyse the key market trends in the power transmission and distribution segments. It will also focus on the key government initiatives that are expected to drive growth in the T&D equipment industry in the next few years. The report will also analyse the T&D equipment market for all key segments – switchgear, transformers, cables and conductors, reactive power equipment, smart meters and insulators used in the transmission and distribution segments. The report will also provide projections for the size of each segment over the next five years till 2023-24.

1. Executive Summary

PART A—MARKET TRENDS AND OUTLOOK

2. Power Sector Overview

- Demand and Supply
- Historical Analysis
- Future Projections
- Key Growth Drivers and Trends
- Outlook

3. Transmission Segment Analysis

- Segment Size and Growth
- Network Performance
- Recent Developments
- Recent M&As
- TBCB Projects Update
- Transmission Project Pipeline
- Transco Capex Plans
- Issues and Concerns

4. Distribution Segment Analysis

- Sector Size and Growth
- Performance under UDAY
- Recent Policy and Regulatory Reforms
- Utility Capex Plans
- Growth Drivers
- Issues and Concerns

5. Government Initiatives supporting T&D Equipment Market

- 24x7 Power for All
- IPDS
- 175 GW Renewable Energy by 2022
- Central and State Initiatives for Smart Metering
- Green Energy Corridor Projects

- Mission 41K for Rail Electrification
- Smart Grid Initiatives and Smart Cities Mission
- Interstate and Intra-state TBCB Opportunities
- Grid Balancing for Renewables
- National Mission on E-Mobility

6. Recent Contracts and Awards

- Recent Transmission Awards
- Recent Distribution Segment Tenders
- Announced and Upcoming Bids

7. Equipment Market Outlook and Projections (TILL 2023-24)

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- Network Additions Projections
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 - Distribution
- Projected Capex of Transmission and Distribution Companies
- T&D Equipment Market Projections
- Projected Investments
- Future Outlook

PART B— TRANSMISSION EQUIPMENT ANALYSIS AND PROJECTIONS (TILL 2023-24)

8. Switchgear

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9. Transmission Towers

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- Recent Trends and Advances in Construction
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- Transmission Line Length Projections
- Projected Demand for Towers

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- New Technologies and Designs
- Underground Cabling: Experience and Outlook
 - Emerging Requirements
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- Projected Demand for Overhead Conductors
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- Potential For Reconductoring And Replacement

11. Power Transformers

- Overview
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- Key Players
- Projections for Transformation Capacity
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12. Insulators

- Overview
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- Overview
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- Key Players
- Utility Initiatives
- Projected Demand for Cables and Conductors
- Potential For Reconductoring And Replacement

15. Distribution Transformers

- Overview
- New Technologies and Advances
- Key Players
- Projections for Distribution Transformation Capacity
- Projected Demand for Distribution Transformers

16. Switchgear

- Overview
- Recent Trends and Advances
- Key Players
- Transformer Capacity Projections
- Projected Demand for Switchgear
 - AIS
 - GIS
 - Hybrid

17. Smart Meters

- Overview
- Growth Drivers
- Smart Meters
- Prepaid Meters
- Net Meters
- Utility Initiatives
- Projected Demand for Smart Meters

18. Key Equipment Manufacturer and Supplier Profiles

This chapter will feature the profiles of leading equipment manufacturers and suppliers covering the following aspects:

- Current Operations
- Key Business Segments
- Products and Services Offerings
- Manufacturing Capacity and Facilities
- Order book
- Recent Orders
- Other Developments (Expansions, M&As, etc.)
- Recent Financial Performance
- Key Contacts

PART C – DISTRIBUTION EQUIPMENT ANALYSIS AND PROJECTIONS (TILL 2023-24)**14. Distribution Conductors and Cables**

- Overview
- New Technologies and Advances
- Key Players
- Projected Distribution Line Length Additions

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