COAL-BASED POWER GENERATION IN INDIA 2019
Trends, Developments, Future Role and Market Outlook

- Report (PDF)
- Data-set (Excel)

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India Infrastructure Research
India’s reliance on coal as the dominant source of power generation continues, with it accounting for about 75 per cent of the total generation in 2017-18. Despite India’s climate change commitments and the rapid development of renewables that have put coal in a less favourable position, coal remains critical in meeting the base load. At the same time, coal has an additional role of balancing power in view of intermittent renewable energy. Meanwhile, the tightened emission norms have had implications for the entire coal-based fleet and will continue to be one of the key themes driving the segment over the next few years. However, the segment faces multiple challenges including slow capacity addition, shortages in coal supply, lack of power purchase agreements, and the rising number of stressed assets. Recent regulatory interventions have attempted to address some of these issues and provide the necessary boost to the segment. These include introduction of a pilot scheme for the procurement of aggregate medium term power, setting up of a high-level committee to address the issues of stressed assets, opening up of commercial coal mining, considering a revision of some PPAs and allowing pass through a costs of implementation of emission control technologies as off-takers. With the government’s strong determination to resolve the issue of stressed assets and improve coal supply to power plants, coal is likely to occupy a significant share in future power generation in the country.
10. Trends in Coal Procurement
- Source Comparison
- Linkage Volume and Trends
- E-auction Volume and Trends
- Captive Volume and Trends
- Imported Volume and Trends

11. Coal Prices
- Domestic Coal Prices
- E-Auction Prices
- Global Price Trend
- Pricing Outlook

12. Coal Quality
- Need for Coal Washing
- Benefits of using Washed coal
- Existing Coal Washing Capacity
- Upcoming Coal Washing Capacity
- Issues and Challenges

13. Coal Transportation
- Share of various Modes of Coal Transportation
- Trends in Rail Freight Costs (including impact on cost of power generation)
- Trends in Indian Railways' Coal Loading
- Rail projects for Coal Evacuation
- Ports Capacity for Handling Coal
- Upcoming Railways and Ports Capacity
- Key Issues and Challenges

SECTION IV: COSTS AND TARIFFS

14. Tariff and Prices
- Factors affecting Tariffs
- Tariff Trends
- Tariff Trends in PPAs
- Tariff Discovered under Case 1 and 2 Bids
- Short-term Power Prices
- E-bidding under DEEP

15. Generation Costs
- Factors Affecting Cost of Generation
- Trends in Generation Costs (Variable as well as fixed)
- State-wise Marginal Costs
- Cost Comparison with other Fuels Options
- Cost Comparison: New versus Old Plants
- Trends in Other Costs (O&M, Depreciation)
- Future Outlook

SECTION V: MARKET OUTLOOK AND OPPORTUNITIES

16. New Project Pipeline
- Analysis of Capacity under Construction
  - By Ownership
  - By Expected CoD
  - By Size
  - By Location
- Current Status of Capacity under Construction
- Delayed Projects
- Time and Cost Overruns in Upcoming Projects
- Stalled/Canceled Projects
- Issues and Concerns

17. Future Outlook and Projections (till 2024-25)
- Outlook for Power Demand
- Capacity Addition Projections
- Fuel Supply
- Capacity Utilisation and PLFs
- Generation Tariffs
- Stressed Assets
- Emission Norms Compliance
- Power Procurement Outlook

18. Market Opportunities for Technology/Equipment Providers
- BTG and BoP Equipment
- FGD Systems
- ESP Upgradation
- Water Management Systems
- Control and Instrumentation (C&I) Systems

SECTION VI: PROFILES OF COAL BASED POWER PRODUCERS

19. Central Sector Players
- NTPC Limited
- Damodar Valley Corporation
- NLC India Limited

20. State Sector
- Maharashtra State Power Generation Company Limited
- Uttar Pradesh Rajya Vidyut Utpadan Nigam Limited
- Rajasthan Vidyut Utpadan Nigam Limited
- Tamil Nadu Generation and Distribution Corporation Limited
- West Bengal Power Development Corporation Limited
- Karnataka Power Corporation Limited
- Madhya Pradesh Power Generating Company Limited
- Chhattisgarh State Power Generation Company Limited
- Telangana State Power Generation Corporation Limited
- Andhra Pradesh Power Generation Corporation Limited
- Haryana Power Generation Corporation Limited
- Singareni Collieries Company Limited

21. Private Sector
- Adani Power Limited
- Tata Power Company Limited
- Reliance Power Limited
- JSW Energy Limited
- Essar Power Limited
- GM Power Limited
- RattanIndia Power Limited
- Lanco Infratech Limited
- CLP India Private Limited
- GVK Energy Limited
- Nabha Power Limited
- Vedanta Limited
- Bajaj Energy Limited
- ACB (India) Limited
- Jai Prakash Power Ventures Limited
- DB Power Limited
- KSK Energy Venture Limited
- Hindustan Powerprojects Limited
- CESC Limited
- Sembcorp Energy India Limited
- Others

Each of the profiles will cover information on current capacity, upcoming projects, operating performance and financial performance.
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