

Irrigation Sector in India 2019

Emerging Trends, New Techniques, Upcoming Projects and Opportunities

- ❖ Report (PDF)
- ❖ Data-set (Excel)
- ❖ Quarterly Updates

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Over the past few years, the irrigation sector has gained traction with a greater focus on major and medium irrigation/multipurpose irrigation projects. Over Rs 5 trillion is planned to be invested in various irrigation projects announced under centrally sponsored schemes and programmes. The government has created two dedicated funds – a long-term irrigation fund and a micro irrigation fund – with an initial corpus of about Rs 400 billion and Rs 50 billion, respectively, for financing these projects. Steps are also being taken to encourage private participation in integrated micro-irrigation systems.

Moreover, technology in the irrigation sector has evolved significantly over the past 10 years with regard to construction equipment, water transfer techniques and types of irrigation systems. Innovative technology-led irrigation systems such as solar-powered lift micro-irrigation are gaining prominence over conventional flooding methods of irrigation. Greater thrust is also being given to drip and sprinkler irrigation systems, and efficient water-use mechanisms.

With all these developments, the sector certainly offers significant opportunities for EPC contractors, and technology and equipment suppliers.

Executive Summary

SECTION I: OVERVIEW, GOVERNMENT INITIATIVES, OUTLOOK AND OPPORTUNITIES

1. Agriculture Sector Overview

- ❖ Size and Growth
- ❖ Key Trends
- ❖ Government Initiatives
- ❖ Export and Import of Agricultural Products
- ❖ Institutional and Policy Framework
- ❖ Growth Drivers
- ❖ Investment Projections (2019-20 to 2023-24)
- ❖ Sector Outlook

2. Irrigation Overview

- ❖ Size and Growth
- ❖ Irrigation Potential
- ❖ Notable Trends
- ❖ Type of Projects (major, medium and minor)
- ❖ Recent Policies, Regulations and Programmes
- ❖ Targets and Achievements
- ❖ Issues and Challenges
- ❖ Future Outlook and Projections
- ❖ Upcoming Opportunities

3. Water Demand and Supply Sources

- ❖ State-wise Demand
- ❖ Water Availability
- ❖ Freshwater Sources
 - Surface Water
 - Groundwater
- ❖ Alternative Sources (recycle and reuse, etc.)
- ❖ Current Supply-Demand Gap
- ❖ Demand Outlook

4. Project Pipeline and Analysis

- ❖ Overall Project Pipeline
- ❖ Project Pipeline Analysis
 - By Region
 - By State
 - By Stage of Development (ongoing, announced, approved and planned)
 - By Type of Project (major, medium and minor)
 - By Completion Period
- ❖ Expected Capacity Addition
- ❖ Top 50 Upcoming Projects

5. Sector Outlook and Market Opportunities

- ❖ Key Growth Drivers
- ❖ Investment Requirements
- ❖ Market Opportunities
 - EPC Contractors
 - Pumps manufactures

- Pipe manufacturers
- Meter manufacturers
- Storage system providers
- Technology providers
- Other Stakeholders
- ❖ Outlook and Projections (2019-20 to 2023-24)

6. Key Government Programmes

- ❖ Pradhan Mantri Krishi Sinchayee Yojana
- ❖ Interlinking of Rivers (ILR) Programme
- ❖ Accelerated Irrigation Benefits Programme
- ❖ Command Area Development and Water Management
- ❖ Participatory Irrigation Management
- ❖ National Groundwater Management Improvement Programme
- ❖ Bharat Nirman Programme
- ❖ Other Schemes/Programme

For each of the programmes we will cover project scope, investment requirements, financing sources, current status, key completed projects, upcoming tenders, targets and timelines, etc.

7. Cost Structures and Water Tariffs

- ❖ Existing Tariff Structure
- ❖ Water Charges across States
- ❖ Recent Tariff Revisions
- ❖ Key Cost Components of Irrigation Systems
- ❖ Type-wise Costs (micro versus drip irrigation)
- ❖ Subsidy Components
- ❖ Issues and Challenges

8. Financing Scenario and Outlook

- ❖ Key Funding Sources
- ❖ Union Budget 2019-20: Announcements and Expected Impact
- ❖ Expenditure Trends
- ❖ The PPP Experience and Potential
- ❖ Issues and Challenges
- ❖ Future Outlook

SECTION II: STATE FOCUS

9. State Agriculture Profiles

This chapter will feature detailed information and analysis of the agriculture sector in 18 states. These are Andhra Pradesh, Bihar, Chhattisgarh, Gujarat, Haryana, Jammu & Kashmir, Jharkhand, Karnataka, Maharashtra, Odisha, Punjab, Rajasthan, Sikkim, Tamil Nadu, Telangana, Uttar Pradesh, Uttarakhand and West Bengal.

- ❖ Key Features of the State Agriculture Sector
- ❖ Trends in Net Irrigated Area
 - By Source
 - By Crops
- ❖ Trends in Gross Irrigated Area
 - By Source
 - By Crops
- ❖ Key Water Sources for Irrigation
- ❖ Irrigation Systems and Techniques

- ❖ Cost Structure and Tariff Trends
- ❖ Recent Policy Developments
- ❖ State-level Programmes and Schemes
- ❖ Key Completed and Ongoing Projects
- ❖ Key Upcoming Projects
- ❖ Major Projects at the Tendering Stage
- ❖ Issues and Challenges
- ❖ Investment Requirements

SECTION III: STORAGE AND TRANSPORTATION INFRASTRUCTURE

10. Irrigation Storage Systems

- ❖ Types of Irrigation Storage Systems
- ❖ Current Storage Practices
- ❖ Innovations and Advancements
- ❖ Major Players
- ❖ Upcoming Projects and Tenders
- ❖ Issues and Challenges
- ❖ Future Outlook

11. Pipeline Transportation Systems

- ❖ Types of Irrigation Pipelines
- ❖ Current Infrastructure in Select States
- ❖ Innovations and Advancements
- ❖ Major Players
- ❖ Upcoming Projects and Tenders
- ❖ Issues and Challenges
- ❖ Future Outlook

SECTION IV: Technology and Equipment Market

12. Irrigation Techniques and Technology

- ❖ Current Technology Deployment
- ❖ Key Irrigation Techniques (drip, surface, sprinkler, center pivot, localised, etc.)
- ❖ Notable Innovations and Advancements
- ❖ Initiatives for Improving Water Use Efficiency
- ❖ Best Practices
- ❖ Future Outlook

13. Focus on Micro Irrigation

- ❖ Salient Features
- ❖ The Experience so far
- ❖ Focus on Integrated Micro-Irrigation
- ❖ Potential for PPP
- ❖ Government Initiatives
- ❖ New Trends and Advancements
- ❖ Future Outlook

14. Pumps and Pumping Systems

- ❖ Pumps Market Size
- ❖ Types of Pumps
 - Electric
 - Solar
- ❖ Other Pumping Systems
- ❖ Key Manufacturers
- ❖ Recent Developments
- ❖ Innovations and Advancements
- ❖ Market Projections
- ❖ Issues and Concerns

15. Meters and Other Equipment Requirements

- ❖ Equipment Market Size and Growth
- ❖ Types of Meters Installed (manual, AMR, ultrasonic bulk flow meters, etc.)
- ❖ Other Ancillary Equipment Requirements
- ❖ Major Players

- ❖ Sourcing Options
- ❖ Innovations and Advancements
- ❖ Future Demand Projections

SECTION V: PROFILES OF KEY PROJECTS AND MARKET PLAYERS

Each of the following chapters (16 & 17) will cover profiles of 15-20 key projects.

- ❖ Project Scope
- ❖ Location
- ❖ Cost
- ❖ Capacity
- ❖ Implementing Agency
- ❖ Developer/PC Contractor
- ❖ Sources of Water Supply
- ❖ Key Funding Sources
- ❖ Types of Irrigation Systems
- ❖ Date of Award
- ❖ Expected Date of Completion
- ❖ Opportunities for Stakeholders (wherever appropriate)

16. Key Completed Projects

17. Key Ongoing Projects

18. Key Players/Contractors

- ❖ Gammon India Limited
- ❖ Gayatri Projects Limited
- ❖ The Indian Hume Pipe Company Limited
- ❖ Jain Irrigation Systems
- ❖ KEC International Limited
- ❖ Larsen & Toubro Limited
- ❖ IL&FS Engineering and Construction Company Limited
- ❖ Amrutha Constructions Private Limited
- ❖ GVPR Engineers Limited
- ❖ Hindustan Construction Company Limited
- ❖ KNR Constructions Limited
- ❖ Megha Engineering & Infrastructures Private Limited
- ❖ Nagarjuna Construction Company Limited
- ❖ Patel Engineering Limited
- ❖ SPML Infra Limited
- ❖ Vijeta Projects and Infrastructure Limited

Each player profile will give information on the company overview, project portfolio (completed and ongoing projects), financial performance, future plans, etc.

Database of Key Projects

The database will be a compilation of upcoming projects (ongoing and planned) in the sector with details on scope, location, cost, capacity, funding sources, implementing agency, contractor (wherever available), current status, expected date of completion, etc.

Quarterly Updates

The three quarterly updates will cover:

- Key Policy Developments
- Recent Announcements
- Update on Key Government Programmes
- Project Completion/Awards
- New Tenders
- Etc.

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