

LNG IN INDIA 2014

CITY GAS DISTRIBUTION IN INDIA 2014

OIL AND GAS PIPELINES IN INDIA 2014

E&P IN OIL AND GAS 2014

Each report package will have three elements:

- ❖ Research Report (PDF)
- ❖ Presentation (PDF)
- ❖ Data Set (Excel Files)

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2. Overview

- ❖ Gas Demand-Supply Scenario in India
- ❖ Role of LNG
- ❖ LNG Market Size and Growth
- ❖ Existing and Upcoming LNG Infrastructure in India
- ❖ Domestic Gas and LNG Price Trends
- ❖ Impact of New Domestic Gas Pricing and Allocation
- ❖ Policy and Regulatory Framework
- ❖ Key Recent Developments
- ❖ Future Outlook

3. Demand

- ❖ Gas Demand from Key User Industries
 - Demand met by Domestic Gas
- ❖ Unmet Demand
- ❖ Key Consumer Segments for LNG
- ❖ Propensity of Sectors to Absorb LNG Prices
- ❖ Current Demand for LNG
- ❖ Demand Projections

4. Global LNG Scenario

- ❖ Demand
- ❖ Supply
- ❖ Price Trends
- ❖ Factors Impacting Global LNG Dynamics
- ❖ Outlook

5. India's Current Sources of LNG Supply

- ❖ LNG Contracts
- ❖ LNG Import Trends (By Supplier Country)
- ❖ Pricing
- ❖ Economics of LNG Sourcing

6 Potential Sources of LNG Supply

- ❖ Key Potential Sources (Gas reserves, production, present LNG exports, prices, LNG terminal projects underway, capacity forecasts, etc.)
 - Qatar
 - Australia
 - Russia
 - US
 - Canada
 - Mozambique
 - Others
- ❖ Attractiveness of Various Sources for India

7. Prices

- ❖ Global LNG Price Trends
- ❖ Prices of LNG for Indian Consumers
- ❖ Price Comparison with other Fuel Options
- ❖ Price Forecasts

8. Existing LNG Infrastructure in India

- ❖ Size and Growth
- ❖ Existing Terminals
 - Capacity
 - Infrastructure and Facilities
 - Pipeline Connectivity
 - LNG Sourcing Tie-ups
 - Expansion Plans

9. Upcoming LNG Infrastructure in India

- ❖ Proposed Terminals
- ❖ Upcoming Terminals
 - Capacity
 - Infrastructure and Facilities
 - Existing/Planned Pipeline Connectivity
 - Expected Commissioning
- ❖ Projected LNG Regasification Capacity
- ❖ Issues and Challenges

10. Future Outlook

- ❖ Global Market Trends
- ❖ India Production Trends
- ❖ India Demand Trends
- ❖ LNG Demand Projections
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SECTION II

11. Company Profiles

- ❖ Petronet LNG Limited
- ❖ Hazira LNG and Port Limited
- ❖ Ratnagiri Gas and Power Private Limited
- ❖ GSPC
- ❖ GAIL
- ❖ BPCL
- ❖ Indian Oil Corporation
- ❖ Swan Energy Limited
- ❖ ONGC
- ❖ HPCL
- ❖ Shell
- ❖ Shapoorji Pallonji
- ❖ Hiranandani Group
- ❖ Others

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- ❖ Key Consumer Segments
- ❖ Gas Supply for CGD
- ❖ Major Players
- ❖ Recent Developments
- ❖ Impact of New Domestic Gas Pricing
- ❖ Impact of New Allocation
- ❖ Key Growth Drivers
- ❖ Expected Market Size for CGD
- ❖ Key Issues and Concerns

3. Policy And Regulatory Framework

- ❖ Institutional Framework
- ❖ Key Acts/Rules
- ❖ Licensing Regime
- ❖ New Gas Pricing
- ❖ Domestic Gas Allocation Principles
- ❖ Proposed Policy Changes
- ❖ Proposed PNGRB Regulations
- ❖ Key Issues and Challenges

4. Market Size and Growth

- ❖ Current Network Size
- ❖ Overall Growth in the Last Five Years (2008-09 to 2013-14)
- ❖ Growth in Network – By State
- ❖ Growth in Network – By operator
- ❖ Growth in PNG and CNG segments

5. Update on Licensing Rounds

- ❖ Historical Review pre PNGRB
- ❖ Review of the First two Rounds
- ❖ Progress on the Third Round
- ❖ New Bidding Criteria
- ❖ Expected Roll-out in the Fourth Round
- ❖ Issues and Concerns

6. Gas Supply Scenario

- ❖ Current Status of Gas Supply
- ❖ Gas Sourcing Options for CGD players (domestic gas versus R-LNG)
- ❖ Projections of Gas Supply (up to 2020)
- ❖ Gas Supply Outlook for CGD

7. Economics and Financing

- ❖ Cost of CGD Business
- ❖ Current Business Models
- ❖ Gas Pricing in CGD (domestic versus R-LNG)

- ❖ Returns/Margins
- ❖ Financing of CGD projects
- ❖ Innovations in Financing
- ❖ Key Concerns

8. Challenges in CGD Business

- ❖ Operational
- ❖ Financing
- ❖ Marketing
- ❖ Regulatory
- ❖ Pipeline Connectivity
- ❖ Others

9. Outlook and Opportunities

- ❖ Projected Demand for CGD (upto 2020)
- ❖ Potential Markets (Identified GAs)
- ❖ Expected CGD Roll-out (short term and long term)
- ❖ Investment Projections
- ❖ Opportunities for CGD Companies
- ❖ Opportunities for Services Providers (CNG stations, piping, compression equipment, transportation, etc.)

10. Update on Pipeline Infrastructure

- ❖ Current Status of Pipeline Connectivity
- ❖ Major Projects Under Implementation
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SECTION II

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- ❖ List of identified GAs with key data and statistics

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 - Key Trends
 - Future Outlook
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 - ❖ Cairn India Limited
 - ❖ Essar Oil Limited
 - ❖ Hindustan Oil Exploration Company
 - ❖ Gujarat Gas Company Limited
 - ❖ Others

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