

NOW AVAILABLE

GAS IN INDIA 2013

Sector Analysis and Market Outlook

The 'Gas in India 2013' report focuses on LNG as an option to meet the country's gas needs. There is an extended coverage of LNG, with chapters on LNG infrastructure in India, LNG sourcing options and global LNG scenario. It also focuses on the recent policy-related developments including pricing, production sharing contracts, etc. The report includes a comparative analysis of the Indian gas sector and the rest of world. It also provides estimates of the demand for gas from the key sectors over the next five years.

Table of Contents

- 1. Executive Summary**
- 2. Gas Overview**
 - Introduction
 - Macroeconomic Scenario
 - Overall Energy Scenario
 - Gas Demand and Consumption
 - Gas Reserves
 - Gas Supply
 - Gas Pricing
 - Gas Transmission Infrastructure
 - Issues and Challenges
 - Future Outlook
- 3. Recent Developments**
 - Introduction
 - Policy
 - Upstream
 - Gas Import
 - Pipelines and Storage Facilities
 - City Gas Distribution
 - Conclusion
- 4. Demand**
 - Introduction
 - Consumption Trend
 - Overall Demand Analysis
 - Demand Analysis of Key Consumer Segments
 - Issues and Concerns
 - Demand Outlook
- 5. Domestic Reserves and Production**
 - Introduction
 - Gas Reserves
 - Exploration Status
 - Production Trend
 - Key Gas Producing Regions
 - Gas Production by Operator
 - Issues and Concerns
 - Production Outlook
- 6. LNG Infrastructure in India**
 - Introduction
 - Existing LNG Infrastructure
 - Upcoming LNG Infrastructure
 - Key Players
 - Issues and Concerns
 - Conclusion
- 7. LNG Sourcing**
 - Introduction
 - Import Trends (2004-2013)
 - Key Sources of LNG Imports
 - Import Prices (Long-term and Spot)
 - Potential Import Sources
 - Outlook
- 8. Global LNG Scenario**
 - Introduction
 - Key Global Trends
 - Future LNG Demand Supply Scenario
 - Trends in LNG Contracts and Pricing
 - Risks and Challenges
 - Conclusion
- 9. E&P Policy**
 - Overview
 - Current Government Policies
 - Production Sharing Contracts
 - Issues and Concerns
- 10. Gas Pricing Policy**
 - Introduction
 - Current Framework
 - Policy Recommendations and Revisions
 - Outlook
- 11. Pricing Trends**
 - Introduction
 - APM Price Trends
 - Gas From Private/Joint Venture Companies
 - Pricing Trends
 - Upcoming Pricing Scenario
 - LNG Pricing
 - Transmission Tariffs
 - CNG and PNG Price Trend
 - Conclusion
- 12. Regulatory Framework**
 - Introduction
 - Legal Framework
 - Institutional Structure
 - Key Regulations
 - Issues and Challenges
- 13. City Gas Distribution**
 - Introduction
 - Evolution of CGD Business
 - Regulatory Framework
 - Current CGD Network
 - Current Status of Key CGD Operators
 - Key Growth Drivers
 - Potential Markets for CGD
 - Issues and Challenges
 - Conclusion
- 14. Pipeline Infrastructure**
 - Introduction
 - Existing Pipeline Infrastructure
 - Key Operational Pipelines
 - National Gas Grid
 - Expansion Plans and New Projects

- Transnational Pipelines
- Issues and Concerns
- Conclusion

15. Unconventional Gas

- Introduction
- Coal Bed Methane
- Shale Gas
- Issues and Concerns
- Conclusion

16. Comparative Analysis: India vs. Rest of the World

- Introduction
- Reserves and Production
- Consumption and Imports
- Pipeline and LNG Infrastructure
- Projected Trends
- Conclusion

17. Future Outlook

- Introduction
- Market Drivers
- Demand Projections
- Supply Projections
- Infrastructure Outlook
- Gas Pricing
- Policy outlook
- Summing Up

18. Company Profiles

- Oil and Natural Gas Corporation
- Reliance Industries Limited
- GAIL (India) Limited
- Oil India Limited
- Gujarat State Petroleum Corporation
- Petronet LNG Limited
- Indian Oil Corporation
- Hazira LNG and Port
- British Gas India Private Limited
- Cairn India Limited
- Hindustan Oil Exploration Company
- Gujarat Gas Company Limited
- Indraprastha Gas Limited
- Mahanagar Gas Limited
- Adani Gas Limited
- Assam Gas Company Limited

19. Appendix



The report is available in PDF format along with PowerPoint presentation.

Release Date: 13 August 2013 No. of pages: 395

About us

This report is published by India Infrastructure Research, a division of India Infrastructure Publishing Private Limited, a company dedicated to providing information on the infrastructure sectors through magazines, conferences, newsletters and research reports. We publish tele.net, Renewable Watch, Gujarat Infrastructure, Smart Utilities, Power Line and Indian Infrastructure magazines as well as more than two dozen sector/industry research reports every year.

Our reports are acknowledged as high-quality, user-friendly, up-to-date, accurate and comprehensive sources of information. Our clients include multinationals, top Indian corporates, commercial and investment banks, consulting companies, public sector companies, government agencies, multilateral agencies and legal firms.

For further information, please visit our website: www.indiainfrastructure.com

GAS IN INDIA 2013 – Sector Analysis and Market Outlook

List of Tables and Figures

LIST OF TABLES

GDP Growth in India during 2005-06 to 2012-13	Regulations for Natural Gas Pipelines
Recent Production and Consumption (bcm)	Financial Criteria
Existing and Upcoming LNG Projects	Bid Bond (Rs million)
Gas Price Based on Rangarajan Committee Recommendations	Weightage Given to Different Factors in Pipeline Bids (%)
Transportation Infrastructure	Applicable Percentage Utilisation (%)
NELP-IX Blocks with Production Sharing Contracts Signed	Guidelines for Gas Consumption
Trend in Industry Offtake of Domestic Natural Gas (bcm)	Key Milestones in CGD Evolution in India
Estimated Demand for Natural Gas in Major Consumer Segments	CGD Regulations by PNGRB
Gas Demand vs. Supply for Power Sector	State-wise CGD Network (end-2012)
Gas Requirement for Power Projects under Advanced Stages of Construction	Operational GAs in Gujarat
PNGRB's Projections on Potential CGD Demand	CGD Network in Gujarat (2012-13)
Production of Sponge Iron (million tonnes)	Operator-wise CGD Customer base in Gujarat (as of November 2012)
Gas Requirement of Sponge Iron Units	GAs in NCR
Gas Demand by Refineries	Operational CGD Network in NCR
LPG Production and Consumption Trend ('000 tonnes)	CGD Customer Base in NCR (2012-13)
Projected Demand for Gas till 2015-16	Operational GAs in Maharashtra (September 2012)
Estimated Gas Reserves as of April 2012 (bcm)	CGD Network in Maharashtra
Established Gas Reserves in Eastern Offshore	CGD Customer base in Maharashtra (2011-12)
Established Coal Bed Methane Reserves	Operating and Under Development GAs in Other States
Estimated Shale Gas Reserves	CGD Network for Other States (2012-13)
Number of Blocks under National Exploration Licensing Policy	Comparison of Fuels from Environmental Impact Perspective
NELP Blocks affected due to Restrictions by Ministry of Defence (as of March 2013)	Growth in Gas Pipeline Network from 2009-10 to 2012-13
Gas Discoveries under the Production Sharing Contract Regime (no.s)	GAIL's Key Pipeline Network
Exploration of Coal Bed Methane Gas	The HVJ-DVPL Corridor
Gas Production in June 2013	Details of Dahej-Panvel-Dabhol Pipeline
Natural Gas Production by Geography (bcm)	East-West Pipeline Details
Production by National Oil Companies (mmscm)	GSPL's Pipeline Network in Gujarat
Production by Private/Joint Venture Companies (mmscm)	Pipelines forming the National Gas Grid
Incremental Production Expected from Projects under Development	Key Upcoming Pipelines of GAIL
Dahej Terminal Facilities	Upcoming Cross-Country Pipelines of GSPL
Existing, Upcoming and Proposed LNG Projects in India	Pipelines Proposed to PNGRB
Financing Details of Kochi Terminal	Pipeline Authorisations won by RGTIL in 2007-08
Gas Supply in India (bcm)	CBM Reserves Established as of November 2012
India's Country-wise LNG Imports in 2012*	State-wise CBM Production from 2009-10 to 2012-13 (mmscmd)
Key LNG Term Contracts	Summary of CBM Blocks Awarded to Leading Participants under CBM Bids/Nomination
Trends in Natural Gas Prices (in \$ per mmmBtu)	Production of Key CBM Players
LNG Imports in 2012 by Country (bcm)	CBM Blocks of Essar Oil Limited
Global Shale Gas Total Recoverable Resources	World Shale Gas Potential 2013
Brief Overview of Blocks Offered and PSCs signed under NELP	Shale Gas Assessment by USGS
PSCs Signed under NELP IX	Details of Key Shale Gas Basins in India
Brief Overview of Blocks Offered and Contracts Signed Under CBM Policy	Operations of Reliance Shale Gas JVs
PSC Matrix as Recommended by the Rangarajan Committee	Comparative Analysis for Reserves and Production (2012 data, in bcm)
Prevailing Gas Prices in India	Comparative Analysis for Consumption and Imports (2012 data, in bcm)
Field-wise Price of Gas for ONGC	Comparative Analysis of Pipeline and LNG Infrastructure (2012 data)
Customer-wise Price of Gas for ONGC	Projected Trends for Production (2020 data, in bcm)
Landfall Price of Gas for Various Consumers (Rs/mcm or \$/mmBtu)	Projected trends for Consumption and Imports (2020 data, in bcm)
Wellhead Gas Prices Prevalent in India (\$/mmBtu)	Projected trends for Pipeline and LNG Infrastructure (2020 data)
Field-wise Gas Pricing Specifications	Projected Demand for Gas for Industrial Use (mmscmd)
Trend in Domestic Gas Prices (\$/mmBtu)	Aggregate Demand Projections across Major Consumer Segments (mmscmd)
Company-wise and Zone-wise Pipeline Tariffs	Incremental Gas Production Expected during Twelfth Plan (mmscmd)
CNG Operators and Prices in Various GAs (Rs/kg)	Projected Addition in Pipeline Network by 2014-15
Key Hydrocarbon Acts in India	Projected LNG Terminal Capacity from Existing and Under Construction Projects (mtpa)
OIDB's Loan Facilities	Proposed LNG Terminal Capacity for Commissioning by 2019-20
	Expected Addition in Global LNG Capacity by 2015 (bcm per annum)

List of Tables and Figures

Benchmarks in Projected Natural Gas Pricing Scenario
Projected Gap between Gas Demand and its Domestic Supply (mmscmd)
ONGC's State-wise Production
ONGC's Discoveries in 2012-13
ONGC Financials (Rs billion)
RIL's Shareholding Pattern
RIL's Field-wise Production of Oil and Gas
RIL's Polymer Production (kilo tonnes)
Progress in RIL's Shale Gas JVs (Q4 2012-13)
RIL's Financials (Rs billion)
RIL's Oil and Gas (E&P) Financials (Rs billion)
List of GAIL's Existing Pipelines
Upcoming Pipelines of GAIL
GAIL's Key Financials (Rs billion)
OIL's Shareholding Pattern
OIL's Proved and Probable Reserves
OIL's Production Pattern
Details of Overseas Blocks of OIL
OIL's Financials (Rs million)
GSPC's Principle Domestic Exploration and Development Areas
GSPC's Gas Production
GSPC's Financials (Rs billion)
GSPL's Financials (Rs million)
PLL's Shareholding Pattern
Details of Dahej Terminal
Details of Kochi Terminal
LNG Sources and Contracted Volumes
PLL's Financials (Rs billion)
IOC's Shareholding Pattern
Details of IOC's E&P Blocks
Refinery Throughput
Trend in IOC's Petrochemical Product Sales
IOC's Pipeline Network
IOC's Fuel Marketing Sales
IOC's Gas Sales and Turnover
Details of IOC's JVs
IOC's Financials (Rs billion)
Shell's Financials (\$ billion)
BGIPL's Oil and Gas Production
BG Group's Financials (\$ million)
Shareholding Pattern of Cairn as of March 31, 2013
Exploration Blocks
Work Progress in Domestic Exploration Portfolio
Cairn India's Financials (Rs million)
HOEC's Oil and Gas Blocks
Status of HOEC's Oil and Gas Blocks
HOEC's Financials (Rs million)
Shareholding Pattern of GGCL
CGD Operations of GGCL in 2012
GGCL's CNG and PNG Customers
GGCL's Financials (Rs million)
Shareholding Pattern of IGL
CGD Operations of IGL

Customer Profile of IGL as of March 2013
IGL Financials (Rs million)
Shareholding Pattern of MGL
MGL's Growth in Network
MGL's CNG and PNG Customers
MGL's Financials (Rs million)
Oil and Gas Interests of Adani Gas
Financial Performance of Adani Enterprises Limited
Key Customers of AGCL
AGCL's Financials (Rs million)

LIST OF FIGURES

Growth in Primary Energy Consumption
Fuel-wise Primary Energy Consumption in 2012 (India and World)
Geographical Locations of Gas Reserves in India
Offshore and Onshore Gas Production (bcm)
Trends in Natural Gas Production and Consumption in India (2007-2013)
Trend in Gas Consumption
Trend in Gas-based Power Generation Capacity
Feedstock Share in Urea Production Capacity
Gas Requirement for Fertiliser Sector by 2016-17
Trend in Index of Industrial Production (base year 2004-05)
Distribution of Gas-based Captive Power across Industries
Proven Gas Reserves (bcm)
Exploration Status of Sedimentary Basins (as of 2011-12)
Trend in Exploration of Sedimentary Basins
Trend in Gross Domestic Gas Production
Trend in Percentage Share of Onshore and Offshore Gas Production
Monthly Trend in Gas Production during 2012-13
Trend in India's LNG Regasification Capacity Additions
Operators' Share of LNG Import Capacity (2012-13)
LNG Spot Price (JCC) Trend in 2012-13
LNG Demand and Supply Projections (mmtpa)
Trends in Natural Gas Spot Prices at Major Global Markets (Monthly Averages)
Comparison of Gas Price Trends across Different Indices
LNG Spot-Price Trend in Asian Markets
Authorisation Process for CGD Pipeline
Growth in the National CGD Network (km)
Network Share of Key CGD Operators (km)
Operators' Share of Pipeline Length
Player-wise Share in Gas Throughput during 2012-13
HVJ- GREP- DVPL Pipelines
RGTIL's East-West Pipeline
Pipeline Routes forming the National Gas Grid
GSPL's Upcoming Inter-state Pipelines
State-wise Number of Blocks Awarded
CBM Reserves in India
India's Sedimentary Basins with Significant Shale Gas Potential
Projected Gas Requirement for Utility Power Sector (mmscmd)
Projected Gas Requirement for Fertiliser Industry (mmscmd)
Projected Gas Requirement for CGD (mmscmd)
Projected Domestic Gas Availability (mmscmd)
GSPC's Assets Abroad

I would like to purchase the “Gas in India 2013 – Sector Analysis and Market Outlook” report:

Format (PDF)	Price	Service Tax (12.36%)	Total
Site Licence (Single Location)	Rs 48,000	Rs 5,933	<input type="checkbox"/> Rs 53,933
Enterprise Licence (Multiple Locations)	Rs 72,000	Rs 8,899	<input type="checkbox"/> Rs 80,899

Hard copy of the report will be available on request at an additional cost of Rs 3,000 plus 12.36% service tax.

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 Royal Bank of Scotland N.V.
Bank Address : M-6, Hauz Khas, New Delhi 110016, India
Account No. : 1050338
Swift Code : ABNAINBBDEL
IFSC Code : ABNA0100327

Contact details:

Deepali Mahajan
 Manager, Information Products
 India Infrastructure Publishing Pvt. Ltd.
 B-17, Qutab Institutional Area, New Delhi - 110016. India
 Tel: +91-11-46038153, 41034600/01; Fax: +91-11-26531196
 Mobile: +91-9971407082
 deepali.mahajan@indiainfrastructure.com