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COAL-BASED POWER GENERATION IN INDIA 2019

Trends, Developments, Future Role and Market Outlook

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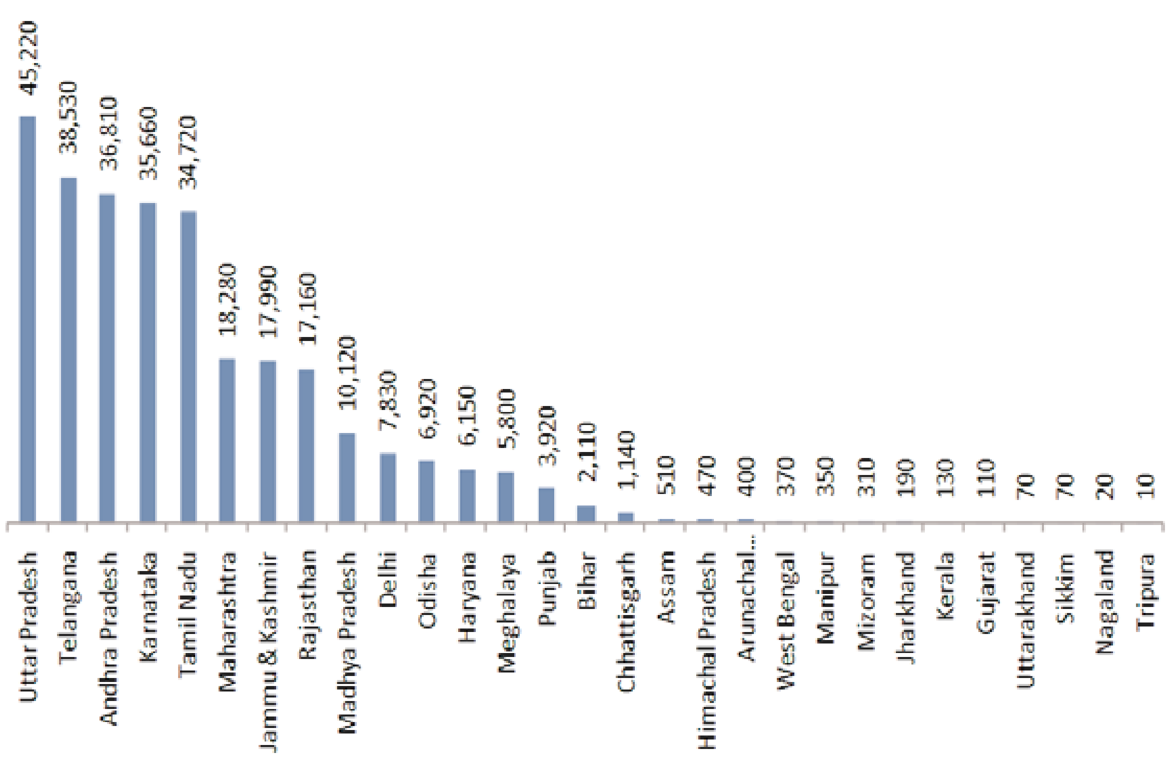
The coal-based power generation segment continued to remain under pressure during the past year. Capacity additions slowed down with only 8 GW being added in 2017-18 and about 4 GW in 2018-19 vis-à-vis record additions until recent years. At the same time, the rapid increase in renewables led to the share of coal-based power in the fuel mix reducing to 54 per cent from 58 per cent a year ago. Coal-based PLFs remained low, although they showed signs of firming up with rising power demand. The national PLFs improved to 60.5 per cent in 2017-18 and 60.9 per cent in 2018-19. However, the PLFs for IPPs continue to remain depressed at around 55 per cent.

The high level of stress in the power sector has been an issue of concern for some time now. The power sector has been one of the major contributors to the stressed assets in India with over 40 GW of capacity across 34 projects identified as stressed assets. Of the total stressed capacity, around 24.4 GW constitute the already commissioned projects while the remaining 15.7 GW is still under implementation. The aggregate outstanding debt of these projects is estimated to be Rs 1,744 billion with a total investment of over 2,000 billion.

Delay in realisation of receivables from discoms impairs the ability of project developers to service their debt in a timely manner and leads to exhaustion of working capital. This, coupled with non-payment of penalties/late payment surcharges is causing financial stress for such projects. The outstanding dues of power producers on discoms stood at Rs 386.96 billion as of March 2019. Of this, Rs 221 billion was the overdue amount, which was not cleared even after 60 days of grace period offered by generators, reflecting stress in the sector.

Projections for Incremental Charging Stations Required per Year till 2030



Growth in coal-based capacity is likely to remain muted in the coming years given the government's enhanced focus on renewable energy, the segment already grappling with overcapacity and stressed assets and over 60 GW of under implementation capacity. Meanwhile, the main and balance of plant equipment market is likely to get a boost by the demand for supercritical units to replace the existing subcritical units as well as to fill for the retiring capacity along with the UMPPs under consideration by the MoP.

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