

TUNNELLING IN INDIA 2022

Market Trends, New Projects, Technology Developments, and Opportunities

- ❖ Research Report
- ❖ Data-set (Excel)

The Tunnelling in India 2022 report will cover the following:

- ❖ Market Size and Recent Trends
- ❖ Pipeline of Upcoming Projects (Announced, Awarded, Under Bidding and Under Construction)
- ❖ Technology Trends and Developments
- ❖ Investment Projections (Till 2026-27)
- ❖ Market Opportunities for Developers/Contractors, Equipment & Materials Suppliers, Technology Providers, etc.

The tunnelling sector has been gaining traction in the past few years. A large number of infrastructure projects are being implemented across sectors such as railways, roads and highways, water supply and sewerage, and urban mass transit. This has led to a surge in tunnelling activity in the country. The size of tunnelling projects has also witnessed a substantial increase. Construction, design and engineering techniques have improved and greater emphasis is being laid on tunnel safety and use of high-tech equipment. More advanced technologies such as TBMs and NATM technologies have witnessed greater deployment. Micro-tunnelling technology is also being tested in congested urban areas. Over the next 4-5 years, the tunnelling sector is expected to attract investments worth more than Rs 5 trillion. Given the large pipeline of projects, tunnelling will be an area of opportunity for construction contractors, developers, technology providers, equipment and material suppliers over the next five years or more.

Summary and Key Insights

- Metro
- Water & Wastewater
- Irrigation
- Caverns

SECTION I: ANALYSIS, OUTLOOK AND OPPORTUNITIES

1. Sector Size, Trends and Developments

- ❖ Size and Growth
- ❖ Emerging Trends
- ❖ Contracting Practices and Standards
- ❖ Project Awards and Completion
- ❖ Recent Developments (in the past 15 months)
- ❖ Impact of Covid-19 on Project Implementation & Completion
- ❖ Technology Trends and Advancements
- ❖ Innovations in Equipment & Materials
- ❖ Risks and Challenges
- ❖ Segment Outlook

2. Project Pipeline Analysis (Till 2026-27)

- ❖ Upcoming Projects
 - By 2022-23
 - By 2024-25
 - By 2026-27
- ❖ Analysis by Stage of Development
 - Announced
 - Approved
 - Awarded
 - Under Bidding
 - Under Construction
- ❖ Analysis by Segment
 - Hydropower
 - Roads & Highways
 - Railways

- ❖ Analysis by Region & State
- ❖ Analysis by Completion Period
- ❖ Top Upcoming Projects in terms of Investment
- ❖ Key Upcoming Tenders

3. Future Outlook and Market Opportunities (Till 2026-27)

- ❖ Growth Drivers
- ❖ Projected Investments
- ❖ Completion Targets (Medium Term and Long Term)
- ❖ Market Opportunities for:
 - Project Developers
 - EPC Contractors
 - TBM Suppliers
 - Technology Providers
 - Equipment Providers
 - Construction Material Suppliers
 - Consultants/PMCs
- ❖ Technology Outlook

SECTION II: SEGMENT ANALYSIS: CURRENT SIZE, UPCOMING PROJECTS AND OPPORTUNITIES

4. Metro Rail Tunnels

- ❖ Size and Growth
- ❖ Key Completed Projects
- ❖ Key Ongoing Projects
- ❖ Technology Trends & Advancements

- ❖ Major Players
- ❖ New Tenders/Contracts
- ❖ Upcoming/Planned Projects

5. Roads & Highway Tunnels

- ❖ Size and Growth
- ❖ Key Completed Projects
- ❖ Key Ongoing Projects
- ❖ Technology Trends & Advancements
- ❖ Major Players
- ❖ New Tenders/Contracts
- ❖ Upcoming/Planned Projects

6. Railway Tunnels

- ❖ Size and Growth
- ❖ Key Completed Projects
- ❖ Key Ongoing Projects
- ❖ Technology Trends & Advancements
- ❖ Major Players
- ❖ New Tenders/Contracts
- ❖ Upcoming/Planned Projects

7. Hydro Tunnels

- ❖ Size and Growth
- ❖ Key Completed Projects
- ❖ Key Ongoing Projects
- ❖ Technology Trends & Advancements
- ❖ Major Players
- ❖ New Tenders/Contracts
- ❖ Upcoming/Planned Projects

8. Irrigation, Water Supply and Sewerage Tunnels

- ❖ Size and Growth
- ❖ Key Completed Projects
- ❖ Key Ongoing Projects
- ❖ Technology Trends & Advancements
- ❖ Major Players
- ❖ New Tenders/Contracts
- ❖ Upcoming/Planned Projects

9. Underground Caverns

- ❖ Size and Growth
- ❖ Key Completed Projects
- ❖ Key Ongoing Projects
- ❖ Technology Trends & Advancements
- ❖ Major Players
- ❖ New Tenders/Contracts
- ❖ Upcoming/Planned Projects

SECTION III: FOCUS ON TECHNOLOGY, EQUIPMENT AND MATERIALS

10. TBM Technology

- ❖ Current Market Size
- ❖ TBM Types
- ❖ Trends & New Advancements
- ❖ Current Deployment Trends (Key Projects)
 - Completed
 - Ongoing
- ❖ Issues and Constraints
- ❖ Segment Outlook

11. NATM Technology

- ❖ Current Market Size
- ❖ Trends & New Advancements
- ❖ Current Deployment Trends (Key Projects)
 - Completed
 - Ongoing
- ❖ Issues and Constraints
- ❖ Segment Outlook

12. Drill and Blast Method

- ❖ Current Market Size
- ❖ Trends & New Advancements
- ❖ Current Deployment Trends (Key Projects)
 - Completed
 - Ongoing
- ❖ Issues and Constraints
- ❖ Segment Outlook

13. Micro-Tunnelling Technology

- ❖ Current Market Size
- ❖ Trends & New Advancements
- ❖ Current Deployment Trends (Key Projects)
 - Completed
 - Ongoing
- ❖ Issues and Constraints
- ❖ Segment Outlook

14. Equipment Market Trends & Projections

- ❖ Current Market Size
- ❖ Types of Equipment
- ❖ Rental and Leasing Market
- ❖ Impact of Covid-19 on Supply & Availability
- ❖ Innovations and Advancements
- ❖ Major Players/Suppliers
- ❖ Issues and Challenges
- ❖ Demand Projections (till 2026-27)

15. Tunnel Safety & MEP Systems

- ❖ Trends & Advancements in
 - Smart Safety & Security Initiatives
 - Electrical & Mechanical Systems
 - HVAC Systems
- ❖ Select Case Studies/Best Practices
- ❖ Key Learnings
- ❖ Issues & Challenges
- ❖ Segment Outlook

16. Material Market Trends and Projections

- ❖ Types of Materials Used (steel, cement, anchors, explosives, admixtures, etc.)
- ❖ Recent Innovations (Fibre & rock reinforcement, geosynthetics, etc.)
- ❖ Noteworthy Initiatives & Best Practices
- ❖ Issues & Challenges
- ❖ Demand Projections for Key Materials (Till 2026-27)

SECTION IV: KEY PLAYERS: OPERATIONAL AND FINANCIAL PERFORMANCE

17. Profiles of Key Players

- ❖ Abir Infrastructure Private Limited
- ❖ Afcons Infrastructure Limited
- ❖ Gammon Infrastructure Projects Limited
- ❖ Hindustan Construction Company Limited
- ❖ IRCON International Limited
- ❖ ITD Cementation
- ❖ J Kumar Infraprojects Limited
- ❖ L&T Construction
- ❖ Navayuga Engineering Company Limited
- ❖ NCC Limited
- ❖ Patel Engineering Limited
- ❖ SEW Infrastructure Limited

This chapter will cover operations, financial performance (wherever available), recent developments, project portfolio and future plans of each company

SECTION V: DATABASE OF KEY PROJECTS

The database is a compilation of upcoming projects in the segment with details on project name, sector/segment, length, location, cost, implementing agency, current status, mode of implementation, etc

- Under Construction
- Awarded
- Under Bidding
- Approved
- Announced
- Planned

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