Transformer, Switchgear & Energy Meters Market in India - Assessing Market Size and Future Growth trajectory

Description:

The sagging demand environment for T&D electrical equipment market in India seems to have short circuited the growth outlook for the sector. The Growth rate of the Indian electrical equipment industry is decelerating at a faster pace, 2011-12 saw 6.6% growth in the backdrop of 11.3% in 2010-11 and 13.7% in 2009-10. At the beginning of FY 12-13, the industry recorded a de-growth of 2.4 per during the first quarter of FY13; most dismal performance over the past decade.

With most of the companies yet to announce their FY12-13 numbers, the nine months performance indicates a flat to negative growth for most of the blue chip companies in the segment. The sluggish domestic demand has pushed some of the Indian companies to look towards other growth opportunity markets. Influx of imports from China has worsened the situation and creating a price competitiveness driven gap between Indian players and Chinese imports.

Indian imports of electrical equipment have grown in the past five years at a CAGR of 28% and China's share in Indian imports of electrical equipment has increased at a much faster rate. Sluggish demand environment, cheap imports, excess capacities have impacted both the topline and bottomline of every small or big company operating in the segment.

However, the authors are of the opinion that this is a temporary stage and a minor pause for this growth of a sector. An efficient and effective grid is the pivotal pre-requisite to improve viability of the overall power sector. The support extended under APDRP, R-APDRP put together would be required to further accelerate the improvement opportunities in the electrical transmission and distribution sector.

The demand for incremental evacuation infrastructure though tied with the rate at which new generation capacities come online, the existing evacuation infrastructure is highly over-utilized / loaded, resulting to black out incidence as faced in the month of July last year. If AT&C losses are to be brought down to international levels, there is no way that investments in this segment can be ignored, and that can be done only through renovation & modernization and new capacity additions in the T&D segment. India aspired to go the smart grid way but reality cannot be ignored that pre-requisite for the same is reliable, robust and sustainable grid infrastructure and not a fragile one.

The authors through this reports aim to assess the current market size of key T&D equipment - Transformers, Switchgear & Energy Meters – that's likely to witness most of the growth in the sector. The report will go beyond CAGR based projection and do a bottom-up exercise to collate the demand for these equipment.

The demand trajectory will be presented in both value and volume, which will be further quantified in terms of demand segmentation by new & refurbishment demand, demand by several discoms, demand by different industries. The report will be outcome of intense primary research conducted across the country with different stakeholders on both demand and supply side of the industry including policy makers.

The report will address following key questions:

- What is the existing market size, market share, market growth for Transformer, Switchgear & Energy Meters across UHV / EHV, HV & MV?
- What are the New Opportunity Vs Replacement / Refurbishment & Modernization Opportunity?
- What are the Emerging Business Opportunity across different new age technologies in making the grid smart and efficient
- Are there any M&A Opportunity?
- What are the export opportunity and export markets?
- Number / New Capacity / Expansion of substation projects that will be required in different discom areas?
- What is the likely yearly demand for these equipment from different discoms / private utilities
- What are Industry Benchmarks across operating & financial performances of companies in the India market?
- What is likely to be the Chinese companies, exporting / operating in India market, future strategy?
- What are the key growth drivers, immediate triggers that could turn around the prevailing scenario in the industry?
- What are the emerging services / Solution related opportunity?
- What are regulations & policies planned to boost the demand environment and competitiveness scenario for companies operating in India

Contents:

Executive Summary

Approach and Methodology

Overview on T&D Equipment Market in India

Transformers Market in India
- Market & Technology Landscape
- Competitive Landscape
- Transformer applications & usage norms across industry, commercial and utilities
- Market Size by end use type (Power and Distribution)
- Market Size by end user industry
- Market Size by transformer ratings
- Market Size by transformer type (dry, liquid)
- Market Size by region (N, S, E, W)
- Market Size by Imports Vs Domestic
- Market Size by companies and all the above classification within company level.
- Replacement Market opportunity in India.
- Services Market Opportunity in India
- Overview on current exports & future opportunity
- Industry SWOT
- Market Share Gainer & Looser
- Technology Innovations
- M&A Opportunity

Switchgear Market in India
- Market & Technology Landscape
- Competitive Landscape
- Switchgear applications & usage norms across industry, commercial and utilities
- Market Size by ratings (EHV, HV and MV)
- Market Size by Switchgear Panels and Breakers
- Market Size by breaking & insulating medium (Vacuum, Air, SF6)
- Market Size for Ring Main Unit
- Market Size by Imports Vs Domestic
- Market Size by different end user segments
- Replacement Market opportunity in India.
- Market Size by Imports Vs Domestic
- Market Size by region (N, S, E, W)
- Market Size by companies and all the above classification within company level.
- Overview on current exports & future opportunity
- Industry SWOT
- Market Share Gainer & Looser
- Technology Innovations
- M&A Opportunity

Energy Meters Market in India
- Market & Technology Landscape
- Competitive Landscape
- Market Size by end user industry – Electricity, Gas and Water
- Market Size by meter end use type for electricity (Grid Meters, Residential Meters, Industry & Commercial Meters)
- Market Size by meter technology type (Single Phase, Poly Phase, Pre-Payment)
- Market Size by different companies
- Market Size by Imports Vs Domestic
- Market Size by different end user segments
- Replacement Market opportunity in India.
- Market Size by Imports Vs Domestic
- Market Size by region (N, S, E, W)
- Market Size by companies and all the above classification within company level.
- Smart Meters Market in India
- Overview on current exports & future opportunity
- Industry SWOT
- Market Share Gainer & Looser
- Technology Innovations
- M&A Opportunity

Market for Equipment Servicing

Installed base of power transformer, distribution transformer and switchgear in India

- By Utility / Age / Make / Type

Understanding the current Maintenance & Repair Practices

- Inhouse Vs Outsourced
- Spend levels
- Preventive maintenance practice

Usage of on-line system for diagnostics and anomaly detection & willingness to use in future

- System deployment at a substation level for collecting and interpreting site data on-line.

Growth Projections (till 2017)

- Key Growth Drivers for Transformers, Switchgears & Energy Meters
- Overview on Trends & Estimating likely growth trajectory for Transformers, Switchgears & Energy Meters
- Segmentation of future growth in demand for Transformers, Switchgears & Energy Meters – Utilities (discom level projection, Industry & Commercial

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