

# CAPTIVE POWER IN INDIA 2019

Trends, Economics, Options & Outlook

+

A comprehensive database of 2,800 Captive Power Plants

- ❖ Report (PDF)
- ❖ Data-set (Excel)

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As investments in new power projects are drying up and discoms are unable to ensure reliable power supply, commercial and industrial consumers are increasingly turning to captive power plants (CPPs). CPPs present a viable option for industrial and commercial consumers to meet their energy demand, hedge against the risks of high grid power tariffs and manage energy costs. Further, trading or third-party sale of surplus power can provide additional revenue to CPP owners. Going forward, with the Union Budget proposing the rationalisation of open access charges and undesirable duties on captive generation is expected to give an impetus to the captive power segment. The new report launched by *India Infrastructure Research* will provide a comprehensive analysis of the existing and upcoming captive power plants in India, including a database of more than 2,800 CPPs across various fuels (coal, gas, liquid fuels and renewables). It will also highlight the impact of recent policy developments that will help propel the sector in the next few years. In addition, the report will provide insights into the relevant aspects of the market in the current context such as tariff trends, open access policy and charges, emission standards, grid reliability, and group captives.

1. **Executive Summary**
2. **Size and Growth**
  - ❖ Current Captive Capacity
  - ❖ Growth in the Past Five Years
  - ❖ Recent and Emerging Trends
  - ❖ Issues and Challenges
  - ❖ Growth Drivers for the Captive Power Market
  - ❖ Future Outlook
3. **Impact of Policy and Regulatory Developments**
  - ❖ Draft Amendment to Electricity Rules, 2005
  - ❖ Coal-related Policy Developments
  - ❖ Draft Amendments to Tariff Policy, 2016
  - ❖ Draft Electricity (Amendment) Act, 2018
  - ❖ MoP's Order on RPO of CPPs
  - ❖ Policy updates for biomass-based cogeneration projects
  - ❖ State-wise Orders for CPPs
  - ❖ Developments related to Discom Health
4. **Analysis of Existing Captive Power Capacity (ranging from 1 MW to over 100 MW)**
  - ❖ Estimated Captive Capacity
  - ❖ Analysis of Existing Captive Capacity
    - By Size
    - By Fuel (Coal, Lignite, Petcoke, Natural Gas, Bagasse, Solar, Wind, Waste-heat Recovery, Liquid Fuels, Biomass, Mixed Fuels, etc.)
    - By Industry (Metals and Minerals, Sugar, Cement, Petrochemicals, Chemicals, Textiles, Engineering, Pulp and Paper, Fertilisers, Institutional Users, Group Captives, etc.)
    - By State
5. **Tariff Trends**
  - ❖ Overview
  - ❖ HT Industrial Tariff Trends
  - ❖ LT Industrial Tariff Trends
  - ❖ Commercial Tariff Trends
  - ❖ State-wise Tariff Revisions
  - ❖ Cross-subsidisation Trends
  - ❖ Outlook for Grid Power Tariffs
6. **Open Access Policy and Changes**
  - ❖ Current Status
  - ❖ OA Policy and Regulatory Scenario in Key States
  - ❖ Trends in OA Charges
  - ❖ Issues and Challenges for OA
  - ❖ Policy Outlook
7. **Captive Power Capacity Projections**
  - ❖ Macro-economic Growth Outlook
  - ❖ Upcoming Captive Capacity
  - ❖ Distribution of Upcoming Capacity (by Fuel, Industry, State, Status of Implementation)
  - ❖ Issues and Concerns
8. **Focus on Renewable Power Based CPPs**
  - ❖ Growth in Renewables-based CPP Capacity
  - ❖ RPO Regulations for CPPs
  - ❖ Key Players and Leading States
  - ❖ Policy and Regulatory Incentives
  - ❖ Proposed Renewables-based Captive Projects
  - ❖ Issues and concerns

**9. Grid Power Reliability**

- ❖ Power Quality Problems for Industrial Consumers
- ❖ State-wise Power Quality Parameters (Outages, Frequency of Power Cuts, etc.)
- ❖ Discom-wise Power Reliability
- ❖ Policy and Regulatory Initiatives
- ❖ Outlook

**10. Power Plant Cost Analysis**

- ❖ Gas-based CPPs (Capex and Opex)
- ❖ Coal-based CPPs (Capex and Opex)
- ❖ Liquid Fuels-based CPPs (Capex and Opex)
- ❖ Renewable energy-based CPPs (Capex and Tariffs)

**11. Fuel Outlook**

- ❖ Coal
  - Demand and Offtake Trends
  - Production and Import Trends
  - Domestic Price Trends
  - International Price Trends
  - Supply Outlook
  - E-Auctions
- ❖ Gas
  - Consumption
  - Supply and Offtake Trends
  - Domestic Gas Prices
  - LNG Imports and Prices
  - Supply Outlook
- ❖ Liquid Fuels
  - Consumption Trends
  - Current Production Trends
  - Prices
  - Outlook

**12. Focus on Group Captives**

- ❖ Overview and Current Regulatory Framework
- ❖ Impact of Draft Rules on Group Captives
- ❖ Major Players
- ❖ Analysis of Existing Group Captive Capacity

- ❖ Issues and Concerns

- ❖ Future Outlook

**13. Emission Standards for CPPs**

- ❖ Current Air and Water Pollution Norms
- ❖ Timelines for Implementation
- ❖ Impacted Capacity
- ❖ Technology Options for Meeting Norms
- ❖ Issues and Concerns

**14. Power Trading Options and Opportunities**

- ❖ Power Sale Options
- ❖ Overview of Short-term Power Market
- ❖ Key Segments
- ❖ Volume and Price Trends at the Power Exchanges
- ❖ Volume and Price Trends in Bilateral Trade
- ❖ Trading Mechanism
- ❖ Industrial Consumer Participation Trends
- ❖ REC Market Trends
- ❖ Key Challenges

**15. Database of Existing Plants**

The most comprehensive database covering over 2,800 captive power plants with information on owner, capacity, location and fuel type. We will also be providing the contact details of captive power plants on a best-efforts basis.

\*CPPs from the following Industries would be covered:

- ❖ Metals and Minerals
- ❖ Cement
- ❖ Petrochemicals and Refineries
- ❖ Chemicals
- ❖ Textiles
- ❖ Engineering
- ❖ Pulp and Paper
- ❖ Fertilisers
- ❖ Sugar
- ❖ Institutional Users
- ❖ Group Captive
- ❖ Etc.

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