



Global Coal-based power generation 2017 Industry Overview, Market Opportunities and Outlook to 2022

Coal-based power generation -Market Demand, Growth, Opportunities and Analysis Of Top Key Player Forecast To 2022

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Description

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Size and Performance

- Coal-based power generation sector has seen capacity addition of more than 75 GW over the past five years to reach an installed capacity of 189 GW as of December 2016. Coal continues to dominate the overall capacity and generation mix with 61% and 80% shares respectively.
- However, the plant load factor has shown a downward trend, having declined by more than 10 percentage points over between 2011-12 and 2015-16, currently at less than 60%. While the decline was due to shortage of coal in the initial years, low demand for power due to financially stressed conditions of discoms, slow growth in economy and increase in renewable-based generation have been responsible for the decline in PLFs in the last 1-2 years.
- Coal production has seen an unprecedented growth with over 8% increase in CIL's production in 2015-16. Also, imports of coal fell for the first time in 2015-16 over the past five years.
- With the rise in domestic coal production and various other policy initiatives of the government, fuel supply to power plants has improved significantly. The number of power plants with critical coal stocks declined from about fifty in November 2014, to less than 5 as of November 2016.

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Key Developments in the Sector

- On the policy front, the government notified various policies including policy on flexibility in utilisation of domestic coal, automatic transfer of coal linkages, auction of coal linkages to non-regulated sector, and bridge linkages for coal for central and state public sector undertakings aimed at increasing the supply of coal, improving the efficiency of power plants and reducing the cost of generation.
- In a move to reduce the impact of coal-based power generation on the environment, the government revised the existing water consumption norms and emission standards, and introduced new emission standards which were not in place before (sulphur dioxide, oxides of nitrogen and mercury) for coal-based plants.
- The issue of compensatory tariffs which had remained unresolved since 2012 saw two major developments in the form of orders by APTEL and CERC. Following the APTEL's order of April

2016 which stated that the petitioners could be compensated under force majeure, CERC, in December 2016, allowed relief to the petitioners for the difference in the coal prices - price based on the coal sales agreements and price of coal ex-Indonesia. However, the same remains to be approved by the Supreme Court.

- Policy on auction of linkages of coal to power sector remains to be finalised.

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Costs and Tariffs

- The average tariffs for coal-based plants have increased marginally over the past five years. While the tariffs for NTPC plants ranged between Rs 3 to 4 per unit, the tariffs discovered in the competitive bidding were relatively higher – between Rs 4 to 4.3 per unit. However, there has been a slowdown in tariff-based competitive bidding. While no Case-II bids took place over the past 4 to 5 years, only 3–4 states called for bids under case-I in the last 2–3 years.
- With regard to short-term transactions, the Ministry of Power launched Discovery of Efficient Electricity Price (DEEP) e-bidding portal for short and medium term transactions. The average tariffs discovered here have been much lower and more varied at the same time – between Rs 2 to 5.4 per unit.

Outlook

- As per Central Electricity Authority (CEA), no coal-based capacity addition is required over the next five years considering the capacity already under construction. India Infrastructure Research estimates that the coal-based capacity addition during the next five years will be around 56 GW, taking the coal-based installed capacity to about 245 GW.
- PLFs are expected to remain subdued, especially with the expected increase in the share of renewable-based generation.
- Looking ahead with respect to tariffs, they are expected to remain in the range of Rs 2 to 4 per unit. While the coal price revision by CIL, rationalisation of coal freight, increase in capital costs of power plants delays in project execution and additional capex requirements owing to revised environmental norms are likely to put pressure on cost of generation for coal-based power plants, at the same time, flexibility in utilisation of coal and rationalisation of coal linkages are expected to ease the tariffs to some extent.

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