

# Natural Gas Pipeline Infra Augmentation: Opportunity Tracker for upcoming projects involving EPC Players, End Users and Strategic Reserves

Business case assessment for key value chain players – EPC players, End Users (Gas based thermal power plants, Fertilizer Units, Iron and Steel Units, CGD players), E&P players, Storage facilities and OEMs across natural gas sector in India along with holistic deck of upcoming project database across gas industry in India

Publishing in April 2021



# Market Research Report

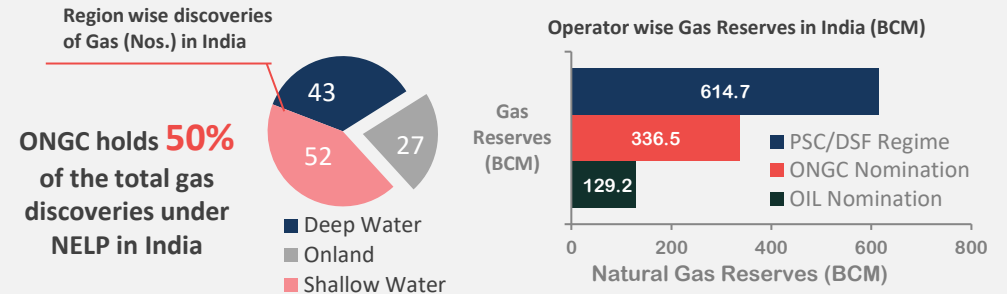
Why eninrac's market research on Natural Gas Pipeline Infra Augmentation: Opportunity Tracker for upcoming projects involving EPC Players, End Users and Strategic Reserves

**USD 60 Billion of investment is anticipated by 2024 in creating gas infrastructure in India including gas pipelines, LNG terminals and city gas distribution (CGD) networks**

**"One Nation One Gas Grid" is the main agenda as the Government plans to double the natural gas pipeline to 34,500 kms by 2025**

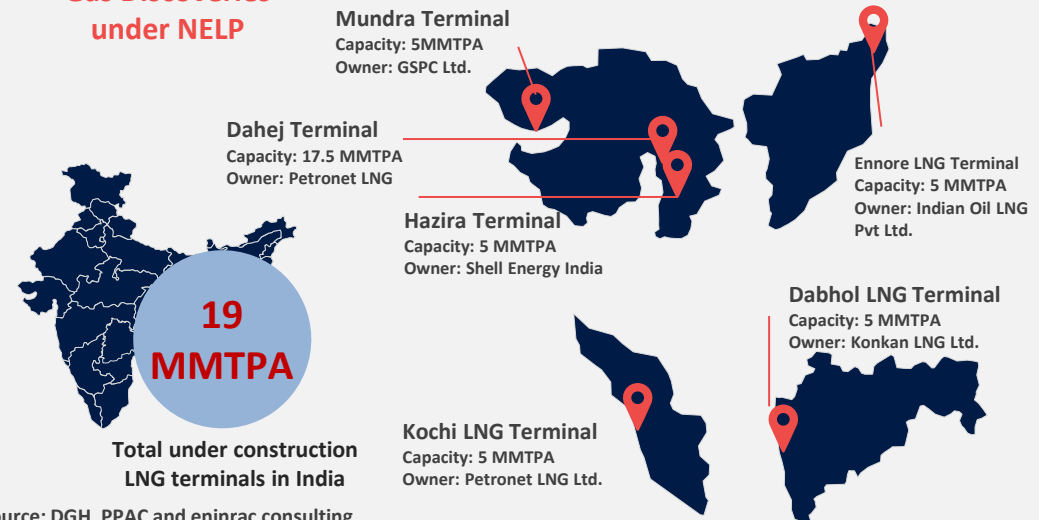
For India to achieve the USD 5 trillion economy, the key lies in the development and governance of a robust infrastructure with an aim to achieve energy security. The announcement to become One Nation One Gas Grid is at the core of the statement that embarks the country towards energy security. Thus, the Government has planned USD 60 Billion of investment in creating the gas infrastructure and has anticipated doubling the share of gas consumption from 8% to 15%. The government plans to increase the natural gas pipeline to 34,500 kms in the next five years with 6225 kms of the natural gas pipeline is under the execution stage. Presently, India had a Natural Gas Pipeline Network of 16,981 kms with a total carrying capacity of 387 MMSCMD wherein the Gas Authority of India Limited (GAIL) has laid the highest share of India's natural gas pipeline with a 70.32% share in the total network. Moreover, 100 more districts announced in the Budget 2021 under the CGD network augmentation shall further boost the demand for natural gas in the country and shall help to improve the efficiency of the earlier under-utilized gas pipelines (utilization at 47%) in the country.

Details of Strategic Gas reserves (BCM) and LNG terminal infra status in India as on Dec 2020



ONGC holds **50%** of the total gas discoveries under NELP in India

### Gas Discoveries under NELP



Source: DGH, PPAC and eninrac consulting

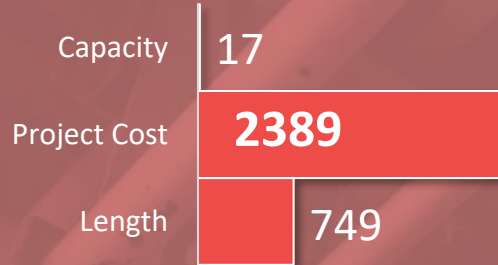


As the LNG terminal infra is expanding in India, a big opportunity potential holds for adoption of CNG based public transportation in the tier 2 cities in vicinity of LNG terminals



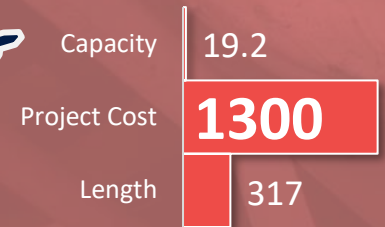
Tracking the upcoming gas pipelines in India – The upcoming gas pipeline are coming majorly in Western and Eastern Region - Business Case for expansion of CGD network in India

Jaigarh - Mangalore Gas Pipeline Project



North East National Gas Pipeline Grid Project

Kanaichhata - Srirampur Gas Pipeline Project



Please Note:  
Capacity in MMSCMD  
Project Cost in INR Crores  
Length in Kms

**26284**  
INR Crores

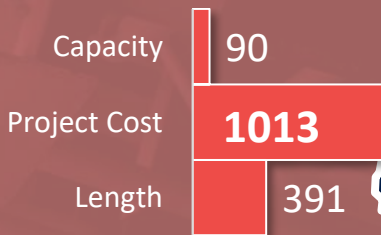
**6225**  
KMs

Total investment under pipeline

Total Pipeline length under pipeline



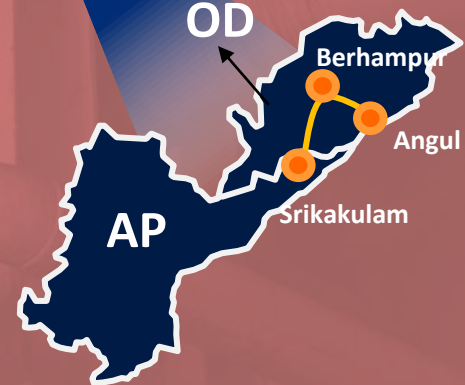
Kakinada- Vizag – Srikakulam Gas Pipeline Project



Kakinada- Vijaywada- Nellore Gas Pipeline Project



Srikakulam-Angul Gas Pipeline Project





**Key Signpost - The government is planning to set up an independent operator to manage common carrier capacity for natural gas pipelines, which would give all gas marketers a level playing field going forward.**

While the industry in India is set for V-shaped recovery, it will have to move towards creating a cleaner fuels market. Positive signs of recovery and growth were visible in the fourth quarter of 2020, as fiscal and monetary stimuli provided by the government got translated into enhanced government and private expenditure. Apart from this, the government is planning to set up an independent operator to manage common carrier capacity for natural gas pipelines. An independent gas transport system operator will be set up for facilitation and coordination of booking of common carrier capacity in all natural gas pipelines on a non-discriminatory, open-access basis. With the establishment of an independent operator, all gas marketers will have equal and transparent access to the common carrier part of the gas pipelines and will be able to book capacity depending on its availability.



**What's our difference margin for market research?**



**1 Our Market Research Coverage Range**

- Evaluating opportunity for EPC players in Natural Pipeline segment in India by 2025
- Evaluating the opportunity tracker for end consumer segment in India by 2025
- Opportunity for Revival of Natural Gas Based Thermal Power Plants in India
- Opportunity for expansion of city gas distribution network in India
- Player wise opportunity in strategic reserves for natural gas in India



**2 Our Market Research DNA & Team of Domain Specialists**

- We boast a highly qualified and experienced team of market research professionals having experience of working in top companies across different domains
- Our focus on nurturing industry connect is paramount which helps us generate high quality robust market feed which is filtered and sourced through from different levels
- Any market research report follows strict turn-around-time procedures with cross-vetting from our Knowledge Grid Experts which adds immense value to our research credentials for the deemed subject



**3 Our Satisfied Patrons and Retention rate of over 97.6% on yoy basis**

We have been bestowed with a phenomenal client retention rate and many satisfied clientele. Our client's have been from wide variety of industry domains and from different geographic locations across the globe. Eninrac consulting is a trusted market research partner and an objective resource augmenting value for more than 257+ Group companies & 1000+ organization across 40+ countries.

## Business Case Evaluation – How the Natural Gas pipeline augmentation transpire the business case for EPC players, End users and Strategic reserves in India?



Will the strategic reserves be the solution to frequent price fluctuations and supply disruptions from Middle East and Africa?



As the Government is planning to become a gas based economy, the sector looks to thrive as multiple reforms and gas pipeline infrastructure project are under pipeline. Government target to increase the share of gas consumption from 8% to 15% by 2030 is the declaration to gradually cut carbon emission in the economy. So, in order to cater to the increase in demand, the government plans to build the gas-based infrastructure in India with an aim to achieve to energy security. So, USD 60 Billion of investment is anticipated by 2024 in creating gas infrastructure in India including gas pipelines, LNG terminals and city gas distribution (CGD) networks. Currently, 6225 kms of gas pipeline are under various stage of construction that will boost the opportunity for various key value chain players in gas based industry.

Moreover, the vast potential that gas offers in India has prompted energy companies to push plans to expand the LNG terminals capacity in India, a move that will expand the clean fuel's reach to relatively smaller pockets of demand where there are limited pipeline access. Indian companies are investing billions of dollars to build infrastructure, including pipelines and a new LNG import terminal. Companies like **India Petronet, H-Energy, Swan Energy, Tata Group, Adani, IOCL** etc are coming up with LNG terminal and regasification units in India. Currently, 960 billion cubic feet per year worth projects is under construction. This shall provide a boost to the public transportation system in the tier 2 cities in vicinity of these terminals for the adoption of CNG based transport. Moreover, India is planning to build strategic reserve of natural gas to further strengthen the country's energy security and shield itself from supply disruptions and frequent price fluctuations coming from perennial political risks in the prime energy supplying countries in the Middle East and Africa. The reserve will also help the country cope with demand spike and price rise in the event of political unrest. Thus, this report helps in providing the complete dossier for business case assessment for the EPC players, End users and building strategic reserves in India by 2025.



## Contents & Coverage – Natural Gas Pipeline Infra Augmentation: Opportunity Tracker for upcoming projects

### 01 Understanding the demand supply dynamics of natural gas in India

Getting a knowhow of major demand centres as per the categories in India and the present supply scenario based on the availability of resources and infrastructure status and development in India

### 04 Understanding the pricing mechanism of natural gas in India

Detailed knowledge of past trends of the detailed pricing details of natural gas along with different price regimes that prevailed in the past. It also highlights the gas pricing reforms in India

### 07 Market Overview for End User consumer segment in India

Detailed coverage of gas consumption by gas based thermal power plants, fertilizer units, petrochemical units, steel units in India. Overview of current city gas distribution infrastructure network in India is also mentioned in this section

### 02 Understanding the Natural Gas pipeline infrastructure in India

Detailed Coverage of potential benefits for the expansion of natural gas pipeline on the end users and industries using the natural gas pipeline in India. It also highlights the boost towards Atma Nirbhar Bharat Campaign.

### 05 Market Overview for EPC players in Natural Gas Pipeline segment in India

Detailed Coverage of investment done in strengthening the gas pipeline infra in India. It highlights the player wise contribution in building the natural gas pipeline infra in different region of India.

### 08 Opportunity tracker for End User Consumer segment in India

Detailed opportunity for key value chain players in natural gas consumption in Natural Gas based thermal power plants, fertilizer units, iron and steel units etc in different regions of India

## Natural Gas Pipeline Infra Augmentation: Opportunity Tracker for upcoming projects involving EPC Players, End Users and Strategic Reserves

### 03 Opportunity for opening up of the natural gas sector for private players in India

Analyzing the opportunity for the private players in natural gas industry through the setting up of the transmission system operator (TSO), policy changes in discovery and exploration of the natural gas and through monetization of public sector units

### 06 Opportunity Tracker for EPC players in Natural Gas pipeline segment in India

Detailed coverage of anticipated growth in gas pipeline infra in terms of capacity addition and investment tune planned by 2025. It also highlights the player wise contribution in strengthening of natural gas pipeline infrastructure in India

### 09 Market overview of Strategic reserves development in India

Overview of of gross production of natural gas in India along with the past trends of award of gas fields in India. A detailed overview of CBM gas development in different gas fields along with player profiling in CBM exploration segment



## Contents & Coverage – Natural Gas Pipeline Infra Augmentation: Opportunity Tracker for upcoming projects

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### 10 Track of upcoming Projects in Natural gas segment in India

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Detailed Coverage of upcoming natural gas pipeline network, CGD network, LNG terminal and regasification units, discovery of strategic gas fields in India

### 11 Key Findings / Recommendations and Conclusion

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The final section of dossier comprises of investment opportunity in building natural gas infrastructure for EPC players, end user consumer and building strategic reserves in India.

**Natural Gas Pipeline Infra Augmentation: Opportunity Tracker for upcoming projects involving EPC Players, End Users and Strategic Reserves**

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### **Key Highlights for Market Research on Natural Gas Pipeline Infra Augmentation**

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1. Understanding the demand supply dynamics of natural gas in India
2. Understanding the Natural Gas pipeline infrastructure in India
3. Evaluating Opportunity for opening of the natural gas sector for private players in India
4. Opportunity Tracker for EPC players in Natural Gas pipeline segment in India
5. Understanding the pricing mechanism of natural gas in India
6. Market overview of Strategic reserves development in India
7. Track of upcoming Projects in Natural gas segment in India
8. Opportunity Tracker for EPC players in Natural Gas pipeline segment in India



### **Differentiating Insights for Market Research on Natural Gas Pipeline Infra Augmentation**

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1. Examining the opportunity for EPC players in Natural Gas pipeline infra segment in India by 2025
2. Player wise contribution in strengthening of natural gas pipeline infrastructure in India
3. Opportunity tracker for end user consumer segment in India by 2025
4. Opportunity for key players in revival of natural gas based thermal power plants
5. Opportunity in expansion of city gas distribution network in India
6. Opportunity assessment for key players in building strategic reserves in India
7. Track of upcoming Projects in Natural gas segment in India
8. Opportunity for private players to enter in the Natural gas segment in India





## Must Buy For

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- National Oil and Gas Companies
- LNG Players
- LNG Traders
- Players into LNG Terminal Infra
- Energy Trading Players
- Natural Gas Downstream Players
- Fuel Retailers
- Automobile Players
- Project Consultants
- Research Firms
- Technical Consulting Groups



## For Queries

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**Please call at +91 9717707602 for any other queries**

## Natural Gas Pipeline Infra Augmentation: Opportunity Tracker for upcoming projects involving EPC Players, End Users and Strategic Reserves

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## Companies Mentioned

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- Oil and Natural Gas Limited
- Gas Authority of India Limited
- Assam Gas Company Limited
- Oil India Limited
- GAIL Gas Limited
- Indian Oil Corporation Limited
- IndianOil-Adani Gas Private Limited
- Think Gas Investments PTE Limited
- Adani Gas Limited
- Torrent Gas Private Limited
- Gujarat Gas Limited
- Hindustan Petroleum Corporation Limited
- Bharat Gas Resources Limited
- Maharashtra Natural Gas Limited
- Megha Engineering & Infrastructures Limited
- Indraprastha Gas Limited
- Green Gas Limited



Truth is ever to be found in the simplicity, and not in the multiplicity and confusion of things

- Sir Isaac Newton

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