India Stationary Energy Storage Market Overview Report

IESA's 5th edition of India Stationary Energy Storage market report estimates the market for Energy Storage in India to be US \$2.8 billion in 2018 and forecasted to grow at a CAGR of 6.1% by 2026. The total annual MWh addition in 2018 hit 24.4 GWh and expected to grow to 64.5 GWh by 2026. The report dwells in-depth into various application of advance storage technologies such as in Renewable Energy integration, Transmission & Distribution (T&D) deferral, ancillary services, railways, microgrids, telecom, and behind the meter applications such as inverters, UPS, solar rooftop and so on. Base year of the study is 2018, forecast period is 2019-2026.

Market Segments:

Grid-scale storage applications in Solar integration, wind integration, T&D deferral, Ancillary services,

Behind the meter storage applications such as telecom, rural electrification, solar rooftops, diesel replacements, inverter back-up, UPS back-up, Thermal Energy Storage

Railways: Rolling stock, signaling and control room back-up.

Key Questions the Report Answers:

- Which are the key growing segments under stationary storage in India? How is the market expected to grow till 2026?
- What are the major drivers & limitations to this market growth?
- What is the status of various grid-scale storage projects in the country?

• What is current policy landscape for stationary storage market, and what is its impact on market growth?

How is the competitive environment changing in this market?



Advanced Energy Storage Technologies Market Summary



Top 5 Applications Cumulative Energy Storage Potential (GWh), 2018-26



Several policies for Energy Storage for RE integration, ancillary services are in the draft or proposal stage are likely to get approved and envisaged to major driver for grid scale storage market.

Demand for energy storage in BTM applications will account for 68-77% of the cumulative market during 2018-2026. Inverters and telecom take the major share of the BTM market.

During 2018-19, SECI, NTPC and state utilities such as APDISCOM and APTransco announced tenders for grid scale energy storage. Large ESS tenders such 3.6GWh SECI tenders indicates the growth of the market during the forecast period.

The 10 MW Tata Power- Rohini Substation project commissioned in 2019 is the first of its kind for an ESS installed at distribution grid for peak management, power quality improvement. Similar projects are expected from other discoms in metro cities for distribution deferral and similar applications. E.g.: APDISCOM, BSES Yamuna Pvt Ltd have announced such projects during 2018-19.



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Technologies covered

- Advance energy storage technologies such as batteries, fuel cell, Thermal Energy Storage

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Research Methodology



Data Collection: IESA reports are formulated based on data collection majorly from primary sources (80%) and 20% of data is based on extensive desk research to identify most relevant secondary information.

Primary research includes interviews with key industry personnel, government institutions such as NitiAayog, CERC, CEA, MNRE, REC, IREDA and state-wise Renewable Energy Development Agencies – CREDA, BREDA, OREDA to name a few, prominent stationary storage companies, other OEMs, Discoms, railways, microgrid companies, industry experts.





Analysis and forecast model generation: Based on data collected, our in-house subject matter experts convert them into critical insights. Bottom-up and top-down approaches are conducted, and by data triangulation the market size is estimated.

For each of the segments in the study, individual market forecast models are developed considering various factors, trends and data, to project the market forecast till 2026.





Two cases have been considered to estimate market growth, namely Business as usual (BAU) which refers to normal conduct of business and National EV scenario (NEV) which refers to Government push, stringent emission norms, state level policy developments and projects.



Sample Graphs for data covered in the report, for representative purpose only and not indicative of real



data.











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