

# Indian Market Report on FGD Technology

Prepared by Krishnan & Associates, Inc.  
Snapshot Summary

2020

Confidential

# Impact of SO<sub>2</sub> Emission Regulations

- MoEF & CC\* issues notification in 2015 with new SO<sub>2</sub> emission standards impacting virtually all existing coal fired capacity in India
- Implementation deadline initially set for 2017 extended to 2022 after industry pushback
- New emission standards has made installation of FGD essential in all thermal power plants
- Implementation dates set for plants based on unit size, location, impact on grid and fleet size
- Each plant has been given a target date based on their compliance plan

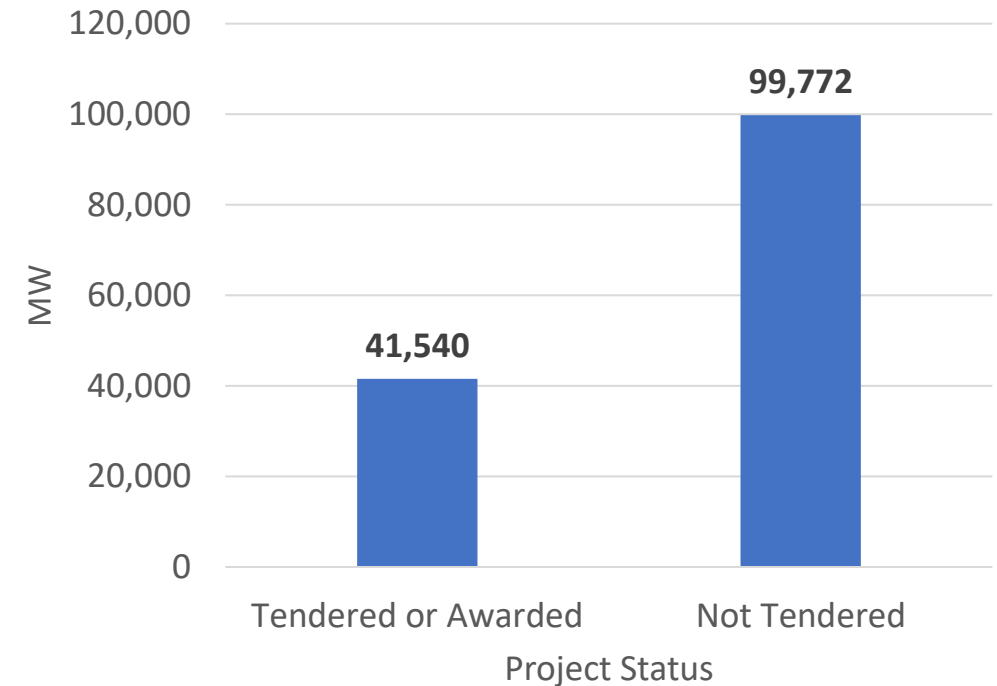
Indian SO <sub>2</sub> Emission Standards				
Parameter (mg/ Nm <sup>3</sup> )	Unit size (MW)	Installed before 2004	Installed between 2004 & 2016	Installed after 2017
SO <sub>2</sub>	< 500	600	600	100
	>= 500	200	200	100

**\*Ministry of Environment, Forest and Climate Change (MOEF & CC)**

# 141 GW of Units Require FGD as per New SO<sub>2</sub> Standards

- ~141 GW or 73% of India's coal fleet have to install FGD technology by 2022\*
  - 41.5 GW tendered or awarded so far
  - ~100 GW not awarded or tendered
- 90%-95% SO<sub>2</sub> reduction from baseline emissions of 1200 mg/Nm<sup>3</sup> to 1400 mg/Nm<sup>3</sup> to be achieved
- 80% of the plants burn high ash Indian fuels
- Impacted plants have ESPs (few baghouse)
- Average FGD construction period varies from 20-24 months

Indian FGD Market -  
Awarded/Tendered Vs. Open  
Opportunities



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