Ports in India 2019
Research report with weekly newsletters and monthly updates

- Research Report
- Data-set (Excel)
- 52 Weekly Newsletters
- 11 Monthly Updates
According to India Infrastructure Research, there is a strong pipeline of 551 projects worth over Rs 9.8 trillion at Indian ports. Of these, 366 projects worth Rs 6.6 trillion are yet to be awarded, pointing out to significant opportunities to the stakeholders across the maritime chain. State-wise, in terms of investment, Maharashtra takes a lead with 25 per cent share, followed by Tamil Nadu at 23 per cent and Andhra Pradesh at 18 per cent. Inland waterways also offer a strong pipeline with development work started only on 10 national waterways out of 106 newly declared.

Key Constraining Factors

- Obtaining environmental clearances and acquiring land still remain difficult, especially for greenfield projects.
- Over-capacity utilisation is another key issue facing the container shipping segment and ports and could put pressure on the margins of terminal operators.
- Another major concern is the shrinking public-private partnership appetite for the sector on account of high cost of capital, lack of clarity in contracts, and absence of last-mile connectivity.
- Sagarmala is definitely going to provide the much needed fillip to the port sector. However, given the large variety of projects, requirement of massive project investment to be sourced from different sources/ agencies, and the effective coordination between the centre and the state governments, the actual materialisation of the projects could take more time than targeted.
- Factors which have limited the adoption of technologies in port operations are shortage of trained and skilled manpower for operating advanced technological systems, a general reluctance among port trusts to adopt new technologies, strict labour laws, presence of old and obsolete equipment and server issues.

Future Outlook

- With a strong pipeline of projects, involving an investment of Rs 9.8 trillion, opportunities exist for all stakeholders across the maritime chain.
- Ports are exploring new business areas to diversify their portfolio and reduce business risks, with roll-on, roll-off and liquefied natural gas terminals, smart port cities, cruise tourism, and port-based special economic zones emerging as new areas of growth.
- Given India's strategic location on the international trade route, the country can also offer ship repair and maintenance services to ships plying from the west to the east along the route.
- The key to increasing cargo handling lies in efficient handling (loading) and efficient dispatching (unloading) of cargo. This efficiency can be achieved through modernisation and mechanisation as well as through setting up of adequate support infrastructure.
- There is a need to provide low-cost financing options (for increasing private participation), encourage refinancing of existing assets and transfer of assets, reduce rigidity of project parameters and undertake proper project structuring.
- Customs procedures at ports have to become more efficient by facilitating online submission of documents and forms, providing single-window clearances, and obtaining more container scanning equipment.
In the past couple of years, the port sector has witnessed a surge in activity in terms of policies and regulations, incentives and schemes, and project uptake. A major boost to the sector came in January 2018, when the central government approved the long-awaited demand for amendments to the model concession agreement (MCA) for PPP projects at major ports. Traffic at Indian ports also witnessed a much higher year-on-year growth of 6.7 per cent in 2017-18, compared to 5.7 per cent in the previous fiscal. The launch of the Sagarmala programme generated the much-needed optimism in the sector. Promoting ease-of-doing business has become a key focus area for the government. Areas such as shipbuilding, cruise shipping, ro-ro ferry services and port connectivity have also witnessed increased interest in the past one year. Going forward, the port sector offers a strong pipeline of projects with many ports announcing ambitious infrastructure projects and capacity expansion plans. Going forward, the challenge will be to address issues such as lack of dedicated berths, supportive infrastructure and adequate connectivity to handle the increasing traffic volumes.
15. Coastal Shipping
- Traffic Trends
- Overall Traffic
- Major Ports
- Non-major Ports
- Commodity Composition
- Major Ports
- Non-major Ports
- Fleet Size of Indian Shipping Industry
- No. and tonnage of Vessels
- Composition of tonnage
- Government Schemes/Initiatives
- Key Trends
- Growth Drivers
- Key Issues and Challenges
- Future Outlook and Opportunities

16. Port Connectivity
- Analysis of Mode of Evacuation of Cargo (By Rail, Road, Pipeline, Conveyor and Inland Waterways)
- Modal Split of Inbound and Outbound Cargo
- Experience so Far - Rail Port Connectivity Projects
- Key Completed Projects
- Port-Rail Connectivity
- Port-Road Connectivity
- Key Ongoing Projects
- Port-Rail Connectivity
- Port-Road Connectivity
- Key Upcoming Projects
- Key Issues and Challenges
- Investment Requirements

17. Modernisation and Mechanisation
- Mechanised v/s Conventional Handling at Major Ports
- Current Practices
- Key Technologies and Solutions Deployed
- New Technology Trends and Advancements
- Government Initiatives
- Noteworthy Projects
- Upcoming Opportunities
- Impact of Sagarmala
- Key Issues and Challenges
- The Way Forward

18. Other Focus Areas
- Roll-on, Roll-off & Ro-pax
- Cruise Tourism
- Shipbuilding/Ship-Repair/Dry Docks at Ports
- Smart Industrial Port Cities
- Post-based SEZs/Coastal Economic Zones
- Industrial Clusters
- Renewable Energy
- LNG Terminals
- Emerging Warehousing and Logistics Requirements

SECTION V: KEY COMMODITIES: TRAFFIC ANALYSIS, EXISTING INFRASTRUCTURE AND CAPACITY ADDITION PLANS

19. Coal
- Traffic Trends
  - Major and Non-major Ports
  - East Coast versus West Coast
  - Loaded and Unloaded
  - Coal Coastal Cargo
- Monthly Traffic Trends in 2018-19
- Coal Handling Capacity and Utilisation
- Existing Infrastructure
  - Berthing Facilities
  - Key Coal Handling Ports
  - Planned Capacity Addition
- Key Issues and Challenges
- Outlook and Projections

20. Iron Ore
- Traffic Trends
  - Major and Non-major Ports
  - East Coast versus West Coast
  - Loaded versus Unloaded
  - Iron Ore Coastal Cargo
- Monthly Traffic Trends in 2018-19
- Iron Ore Handling Capacity and Utilisation
- Existing Infrastructure
  - Berthing Facilities
  - Key Iron Ore Handling Ports
  - Planned Capacity Addition
- Key Issues and Challenges
- Outlook and Projections

21. Fertilisers
- Traffic Trends
  - Major and Non-major Ports
  - East Coast versus West Coast
  - Loaded versus Unloaded
  - Urea Import Traffic
- Monthly Traffic Trends in 2018-19
- Fertiliser and FRM Handling Capacity and Utilisation
- Existing Infrastructure
  - Berthing Facilities
  - Key Fertiliser and FRM Handling Ports
  - Planned Capacity Addition
  - Key Issues and Challenges
  - Outlook and Projections

22. POL
- Traffic Trends
  - Major and Non-major Ports
  - Port-wise Traffic
  - East Coast versus West Coast
  - Loaded versus Unloaded
  - POL Coastal Cargo
  - Refineries in India
- Monthly Traffic Trends in 2018-19
- POL Handling Capacity and Utilisation
- Existing Infrastructure
  - Berthing Facilities
  - Key POL Handling Ports
  - Planned Capacity Addition
- Key Issues and Challenges
- Outlook and Projections

23. Containers
- Traffic Trends
  - Major and Non-major Ports
  - Port-wise Analysis
  - Terminal-wise Analysis
  - East Coast versus West Coast
  - Loaded versus Unloaded
  - Transshipment Traffic
- Monthly Traffic Trends in 2018-19
- Container Handling Capacity
  - Port-wise
  - Terminal-wise
- Vessel Traffic
- Efficiency Trends
- Performance of Key Container Terminals
- Existing Infrastructure - Berthing Facilities
- Planned Capacity Addition
- Key Issues and Challenges
- Outlook and Projections

24. Major Ports
- Deendayal Port
- Paradip Port
- Jawaharlal Nehru Port Trust
- Visakhapatnam Port
- Mumbai Port
- Kolkata Port
- Chennai Port
- New Mangalore Port
- V.O. Chidambaramar Port
- Kamarajar Port
- Cochin Port
- Mormugao Port

25. Key Non-Major Ports
- Overview
- APSEZL-operated Ports
- Dighi Port, Maharashtra
- Gangavaram Port, Andhra Pradesh
- Gopalpur Port, Odisha
- J.S.W Jaigarh Port, Maharashtra
- Kakindu Seaports, Andhra Pradesh
- Karikal Ports, Puducherry
- Krishnapatnam Port, Andhra Pradesh
- Port of Pipavav, Gujarat

Monthly Updates
The 11 monthly updates will comprise 16-24 pages on:
- Analysis of Traffic at Major Ports
- Commodity-wise Traffic at Major Ports
- Fleet Size of the Indian Shipping Industry (No. of vessels and tonnage)
- Project Update (Major & Non-Major Ports)
- Upcoming Tenders (Major & Non-Major Ports)
- New Project Announcements (Container terminals, berths, road & rail connectivity, inland waterways, dredging, etc.) (Major & Non-Major Ports)
- Key Data and Statistics

Weekly Newsletters
The 52 weekly newsletters will comprise 4-6 pages. It will cover new developments in the port sector relating to:
- Policy Announcements
- Government Initiatives
- Project Completions/Awards/Announcements
- Update on Key Programmes
- Key Financings
- Technology Initiatives
- Etc.
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