

New Research Report

LOGISTICS IN INDIA 2019

Emerging Trends, Segment Analysis, Growth Drivers and Market Opportunities

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India Infrastructure Research

Emerging Trends, Segment Analysis, Growth Drivers and Market Opportunities

With the grant of infrastructure status and the implementation of the goods and services tax (GST), the government estimates that investments in the logistics sector will reach \$500 billion by 2025. The proposed introduction of the National Logistics Policy will support the flow of this investment. The grant of infrastructure status will enable the sector to mobilise this investment at easier terms with enhanced limits. The rising consumer demand, boom in e-commerce and boost in manufacturing are other key drivers of investments. Increased investor interest is now being witnessed across the sector, especially in the warehousing space. Private equity investors have actively invested in the sector. A shift from the pure transportation business to end-to-end services has taken place, thereby facilitating the growth of the third-party logistics (3PLs) and supply chain management industries in India. The government too has highlighted priority areas for the sector and aims to develop an Integrated Logistics Action Plan. Meanwhile, the development of dedicated freight corridors and the DelhiMumbai Industrial Corridor are being touted as the key drivers of change.

SECTION I: MARKET TRENDS, DEVELOPMENTS AND OUTLOOK

Executive Summary

1. Sector Overview

- ❖ Macroeconomic Scenario
- ❖ Size and Growth
- ❖ Trends in Logistics Performance Index
- ❖ Impact of Infrastructure Status
- ❖ Modal Transportation Mix
- ❖ Growth Drivers
- ❖ Trends and Developments
- ❖ Key Issues and Challenges
- ❖ Outlook and Projections (2019-20 to 2023-24)

2. Draft National Logistics Policy

- ❖ Salient Features
- ❖ Focus Areas
 - National Logistics Action Plan
 - National Logistics e-Marketplace
 - Data & Analytics Centre
 - Optimisation of Modal Mix
 - Reduction in Logistics Costs
 - Model Logistics Corridors
 - Commodity Specific Interventions
 - Infrastructure Creation (MMLPs/LPs/Warehouses)
- ❖ Industry Response and Expectations
- ❖ Expected Timelines

3. GST: Impact, Benefits and Challenges

- ❖ The Experience So Far
- ❖ Impact On:
 - Supply Chain Management
 - Transit Time
 - Storage and Warehousing
 - Deployment of Efficient Practices
 - Cost of Operations
 - Technology Uptake
- ❖ Unresolved Issues

4. Market Outlook and Projections (2019-20 to 2023-24)

- ❖ Policy and Regulatory Outlook
- ❖ Investment Projections

- ❖ Projections by Mode of Transportation (road, rail, ports and air)
 - Freight Traffic
 - Capacity/Network Addition
 - Freight Rates
- ❖ Warehousing and Storage Projections
 - Requirements across Segments (manufacturing, consumption, EXIM)
 - Requirements of Top Hubs/Cities
 - Industry-wise Warehousing/Storage Demand Projections
- ❖ Demand from End-user Industries
- ❖ Key Upcoming Projects
- ❖ Big-ticket Opportunities to Look Out For: 2019-20 and Beyond

5. Investment Experience

- ❖ Trends in Investment
- ❖ Key Recent Deals and Transactions
 - Private equity
 - Project equity
 - Mergers and Acquisitions
 - IPOs
- ❖ Key Successful Exits
- ❖ Historical Rates of Returns
- ❖ Upcoming Opportunities for Investors
- ❖ Expected Returns
- ❖ Investment Outlook

SECTION II: FREIGHT SEGMENT: MARKET ANALYSIS & OPPORTUNITIES

Each of the following chapters will include:

- Segment Size and Growth
- Policy and Regulatory Framework
- Key Projects/Programmes/Initiatives
- Planned Capacity Addition
- Upcoming Projects and Market Opportunities
- Sector Outlook and Projections

6. Railways

7. Roads

8. Ports, Coastal Shipping and IWT

9. Air Cargo

10. Express Logistics

SECTION III: LOGISTICS INFRASTRUCTURE: MARKET ANALYSIS & OPPORTUNITIES*Each of the following chapters will include:*

- Segment Size and Growth
- Policy Framework
- Government Schemes and Initiatives
- Major Players
- Key Projections
- Upcoming Projects and Opportunity Areas

11. Warehousing: Agricultural and Industrial**12. Logistics Parks & MMLPs****13. Free Trade Warehousing Zones****14. Cold and Liquid Storages****15. Container Freight Stations/Inland Container Depots****SECTION IV: SUPPLY CHAIN MANAGEMENT: MARKET ANALYSIS & OPPORTUNITIES***Each of the following chapters will cover:*

- Market Size and Growth
- Recent Trends
- Demand Drivers
- Major Players
- Future Outlook
- Demand Projections

16. Value Added Services**17. 3PL, 4PL and Reverse Logistics****18. Freight Forwarding****19. Inventory Management****20. Packaging and Labeling****SECTION V: EQUIPMENT AND TECHNOLOGY: MARKET ANALYSIS & OPPORTUNITIES****21. Focus on Equipment**

- ❖ Size and Growth
- ❖ Recent Trends
- ❖ Demand Drivers
- ❖ Major Players
- ❖ Future Outlook
- ❖ Opportunities for Equipment Providers

*The chapter will cover logistics hardware, storage equipment, and warehouse equipment.***22. Emerging Technologies & Solutions**

- ❖ The Experience So Far
- ❖ Trends in Automation and Technology
- ❖ Demand Drivers
- ❖ Recent Advances
- ❖ Future Outlook
- ❖ Opportunities for Technology Providers

SECTION VI: DEMAND FROM USER INDUSTRIES**23. Key End-user Industries**

- ❖ Food Processing
- ❖ Pharmaceuticals
- ❖ Automobiles
- ❖ Electronics
- ❖ Chemicals
- ❖ Textiles
- ❖ Engineering Goods
- ❖ Brick and Mortar Retail
- ❖ E-commerce
- ❖ Cement
- ❖ Steel
- ❖ Others

*For each of the above industries will include Size and Growth, Trends and Developments, Logistics Needs and Requirements, Industry Outlook and Issues and Challenges.***Monthly Updates**

The 11 monthly updates will cover:

- Key Policy Developments
- Recent Announcements
- Key Government Initiatives/Programmes
- Company Announcements
- Project Completions/Awards
- New Projects
- Financial Developments (PE Deals/Mergers & Acquisitions/IPOs)

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