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# Ports in India 2020

Sector Analysis, Project Pipeline, Emerging Opportunities and Outlook

- ❖ Research Report
- ❖ Data-set (Excel)
- ❖ 52 Weekly Newsletters
- ❖ 11 Monthly Updates

**India Infrastructure Research recently released the 12th edition of the Ports in India report (2020).**

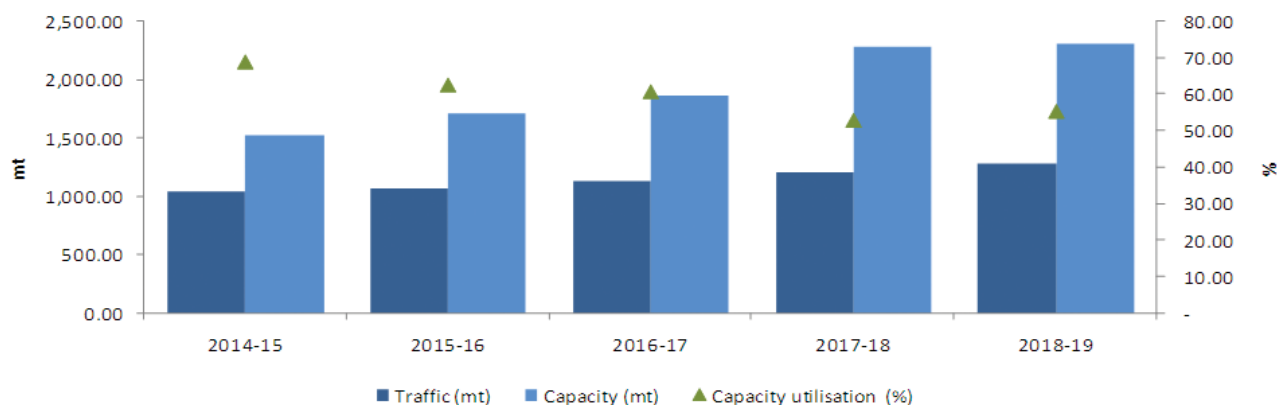
**The report covers:**

- ❖ Historical data and analysis of the sector's size and growth (2014-15 to 2019-20)
- ❖ A comprehensive account of the progress, challenges and opportunities under Sagarmala programme
- ❖ A detailed project pipeline at both major and non-major ports
- ❖ Detailed research on traffic, capacity, trends and outlook of key commodities
- ❖ Progress, challenges and opportunities under nationals waterways and coastal shipping
- ❖ Projections for traffic, capacity and investment till 2024-25

## Report Summary and Key Insights

- ❖ Indian maritime transport growth is driven by developments in the global as well as domestic economy. The world maritime trade lost its momentum in 2018, with volumes expanding at 2.7 per cent, below the historical averages of 3 per cent and 4.1 per cent recorded in 2016 and 2017. Treading on the same lines, Indian major ports registered a flat growth of 2.9 per cent in 2018-19 over the previous fiscal year.
- ❖ Overall, the traffic handled at Indian ports increased at a compound annual growth rate of 5.1 per cent from 2014-15 to 2018-19. The growth was driven mainly by non-major ports (5.5% from 2014-15 to 2018-19 compared to 4.7% at major ports during the period under consideration).
- ❖ In the last 4-5 years, inland waterways and coastal shipping have received increased government attention and the results measured in terms of traffic are quite visible.
- ❖ Port-wise, Deendayal port has continued to handle the maximum traffic amongst the major ports (~5.7% growth from 2014-15 to 2018-19). With respect to non-major ports, Mundra is the biggest private commercial port in the country.
- ❖ There have been significant changes in the commodity composition of traffic over the past few years.
- ❖ Some of the key policy initiatives include - Tariff Guidelines 2019 for BOT Operators in Major Ports, relaxations under the Merchant Shipping Act, 1958, for coastal movement of export-import transshipment containers and empty containers, fresh guidelines for establishing FSRU at major ports, Recycling of Ships Act, 2019, and revised port policy for the existing and future captive jetties players and other players in Gujarat.
- ❖ The sector's flagship programme, Sagarmala, can be a game changer for the maritime sector, due to its focus on port-led development. The progress has been more visible across the port modernisation and port connectivity components of the programme. However, about 40% of the projects are still in the DPR stage.

Cargo traffic, capacity and capacity utilisation at Indian ports, 2014-15 to 2018-19

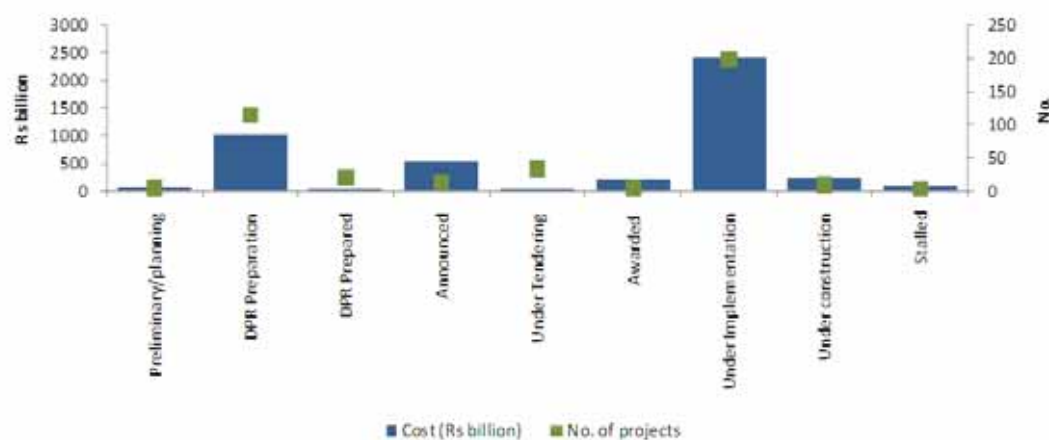


- ❖ However, despite the policy push and other initiatives, the sector is still marred with several issues and challenges. Lack of integrated planning has led to imbalance in capacity creation across the country. Though overall capacity is not a constraint, for certain locations and some particular types of cargo, there is need for capacity creation.
- ❖ Land acquisition and obtaining clearances remains major roadblock, especially with respect to the development of new ports.
- ❖ The report also mentions that the miniscule share of coastal shipping and inland waterways is an area which needs attention.
- ❖ High port charges at Indian ports is another deterrent. The neighbouring ports are cheaper by 60-90% with respect to marine charges.

## The Road Ahead

- ❖ According to the report, the short term outlook for the sector remains bleak due to global developments and low domestic demand. However, the long term outlook is positive backed by government reforms and global trade recovery being on cards.
- ❖ By 2024-25, traffic at Indian ports is expected to be in the range of 1,700 mt (base case scenario) to 2,271 mt (highly optimistic scenario).
- ❖ Further, there is a strong pipeline of 406 projects worth around Rs 4.85 trillion at Indian ports offering significant opportunities to various stakeholders.
- ❖ Private participation also has a wide scope in the Indian port sector. Continued focus of the government to develop port infrastructure, robust project pipeline, Sagarmala programme, proposed National Integrated Logistics Policy, etc, are expected to keep investors interested in the sector.

### Project Pipeline at Indian Ports



## About India Infrastructure Research

India Infrastructure Research is a division of India Infrastructure Publishing, a company dedicated to providing information on the infrastructure sectors through magazines, conferences, newsletters and research reports. We have 22 years of experience in tracking and analysing infrastructure sectors and publish about 35 plus multi-client reports in the areas of power, renewable energy, oil & gas, ports & shipping, roads & bridges, urban infrastructure, telecommunications, aviation, railways, water, health, housing, banking and infrastructure finance. We also publish six magazines - Power Line, Indian Infrastructure, Renewable Watch, tele.net, Gujarat infrastructure and Smart Utilities and have two online databases - [www.indiainframonitor.com](http://www.indiainframonitor.com) (covering all infrastructure projects with investments of over Rs 1 billion) and [www.indiapowerregulation.com](http://www.indiapowerregulation.com) which provides information on the regulatory developments in the Indian electricity sector. India Infrastructure offers custom research services as well, drawing on our staff of almost four dozen infrastructure research analysts.

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## 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)
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  - New Project Announcements (Container terminals, berths, road & rail connectivity, inland waterways, dredging, etc.)
- For Major & Non-Major Ports
- Key Data and Statistics

## Weekly Newsletters

The 52 weekly newsletters will comprise 4-6 pages. They 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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