

LOGISTICS IN INDIA 2023

Market Growth, Trends, and Opportunities

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

The Logistics in India 2023 report will cover the following:

- ❖ Market size and growth and key trends and developments
- ❖ Infrastructure development and opportunities under government programmes/schemes/initiatives
- ❖ Freight traffic projections, storage and warehousing demand-supply, and expected investments
- ❖ Technology and digitalisation needs and requirements

India's logistics sector is going through a paradigm shift and is witnessing several positive developments. Policy measures such as Gati Shakti Master Plan, National Logistics Policy, revision of Railways' land use policy, and more recently launch of 100 critical transport infrastructure projects for first and lastmile connectivity will help in reducing the country's logistics costs, improve multimodal connectivity and ramp up infrastructure. The country's container market is being driven by the rising demand for containerised commodities, the development of container terminals and digitalisation in container shipping. Meanwhile, the warehousing industry is seeing a growing focus on large and sophisticated warehouses. Technology solutions including AI, robotics, IoT, etc. are playing a crucial role in optimising warehousing functions, supply chain automation, cost optimisation and more efficient operations. Going forward, big-ticket projects such as dedicated freight corridors, cargo terminals, industrial corridors, port connectivity and port modernisation projects under Sagarmala programme, and greenfield expressways under Bharatmala Pariyojana, etc. will contribute significantly to country's logistics sector growth. The industry is expected to reach \$400 billion in the next three to four years from the current market size of \$230 billion, presenting a host of opportunities for logistics service providers, warehouse developers, technology providers, material and equipment suppliers, etc.

Report Summary and Insights

SECTION I: MARKET GROWTH, KEY TRENDS AND OPPORTUNITIES

1. Sector Overview: Trends and Developments

- ❖ Macroeconomic Scenario
- ❖ Size and Growth of Key Segments
- ❖ Player Landscape
- ❖ Emerging Trends
- ❖ Key Recent Developments
- ❖ Policy Environment
- ❖ Logistics Ease Across Different States (LEADS) Survey Outcomes
- ❖ Modal Transportation Mix: Current and Expected
- ❖ Role of Technology and Automation
- ❖ Issues and Challenges

2. Investment Trends and Opportunities

- ❖ Key Investment Trends
- ❖ Recent Deals and Transactions
 - Private Equity and VC Funding
 - Platform Investments
 - Mergers and Acquisitions
- ❖ PE Exits and Returns
- ❖ Upcoming Opportunities for Investors
- ❖ Investment Opportunities under NMP
- ❖ Key Risks

3. Key Projections (2023-24 to 2027-28)

- ❖ Freight Traffic Projections:
 - Rail
 - Road
 - Ports
 - Air
- ❖ Warehousing Demand and Supply Projections
- ❖ Projected Demand for Temperature Controlled Warehousing
- ❖ Capacity and Investment Projections

4. Future Outlook and Market Opportunities

- ❖ Growth Drivers
- ❖ Policy Outlook
- ❖ Investment Outlook
- ❖ Emerging Needs and Requirements
 - Automation and IT
 - Sourcing Strategies
 - State-of-the-art Warehouses
 - Palletised Cold Storages
 - Others
- ❖ Key Upcoming Projects (DFC, Bharatmala Pariyojana, NWs, Jal Marg Vikas Project, MMLPs, FTWZs, Industrial Corridors, etc.)
- ❖ Market Opportunities for:
 - Logistics Service Providers
 - Warehouse Developers
 - Investors
 - Equipment Manufacturers
 - Technology Solution Providers
 - E-commerce Players
 - Others
- ❖ Sector Outlook and Projections (2023-24 to 2027-28)

5. Technology and Automation:Trends and Requirements

- ❖ Emerging Trends in Automation
- ❖ Key Technology Initiatives:
 - Supply Chain Automation
 - Digital Platforms and Contactless Operations
 - Smart Warehousing Tools
 - Logistics Robots and Chatbots
 - Drones
- ❖ Key Players
- ❖ Future Outlook and Opportunities

SECTION II: FREIGHT MOVEMENT: KEYTRENDS, INITIATIVES AND TRAFFIC PROJECTIONS**6. Railways**

- ❖ Size and Growth
- ❖ IR's Freight Traffic and Earnings
- ❖ Commodity-wise Freight Trends
- ❖ Government Freight-related Initiatives
- ❖ Upcoming Projects
- ❖ Investment Requirement
- ❖ Freight Traffic Projections (2023-24 to 2027-28)
- ❖ Outlook and Market Opportunities

7. Roads

- ❖ Size and Growth
- ❖ Key Projects/Programmes/Initiatives
- ❖ Trends in the Trucking Industry
- ❖ Pricing Trends
- ❖ Technology Disruptions
- ❖ Planned Capacity Addition
- ❖ Investment Requirement
- ❖ Upcoming Projects
- ❖ Freight Traffic Projections (2023-24 to 2027-28)
- ❖ Outlook and Market Opportunities

8. Ports, Coastal Shipping and IWT

- ❖ Traffic Trends Analysis
 - By Major and Non-major Ports

- By Export-Import
- By Coast
- By Transshipment Traffic
- By Terminal
- Coastal Shipping Traffic
- Inland Waterways and Riverways
- ❖ Government Schemes and Initiatives
- ❖ Upcoming Projects
- ❖ Maritime India Vision 2030
- ❖ Investment Requirement
- ❖ Freight Traffic Projections (2023-24 to 2027-28)
- ❖ Outlook and Market Opportunities (Sagarmala and beyond)

9. Air Cargo

- ❖ Size and Growth
 - Overall Trends in Air Freight Traffic
 - Airport Category-wise Air Cargo Traffic
 - Region-wise Air Cargo Movement
 - Belly Cargo vs. Dedicated Cargo
 - Inter-state and Inland Movement
- ❖ Cargo Infrastructure at AAI Airports
- ❖ Existing Capacityand Recent Additions
- ❖ Key Initiatives
- ❖ Planned Capacity Addition
- ❖ Upcoming Projects and Investment Requirement
- ❖ Freight Traffic Projections (2023-24 to 2027-28)
- ❖ Outlook and Market Opportunities

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- ❖ Size and Growth
- ❖ Government Schemes and Initiatives
- ❖ Emerging Trends and Developments
- ❖ Market Structure and Key Players
- ❖ Growth Drivers
- ❖ Key Issues and Challenges
- ❖ Upcoming Projects
- ❖ Outlook and Projections

11. Industrial Warehousing

- ❖ Market Size and Growth
- ❖ Emerging Trends and Developments
- ❖ Key Players and their Plans
- ❖ Growth Drivers
- ❖ Key Issues and Challenges
- ❖ Outlook and Projections

12. Silo Storage

- ❖ Market Size and Growth
- ❖ Government Schemes and Initiatives
- ❖ Construction of Steel Silos
- ❖ Key Issues and Challenges
- ❖ Outlook and Projections

13. Liquid and Gas Storage

- ❖ Size and Growth (Crude Oil, LNG, Ports)
- ❖ Key Trends and Developments
- ❖ Growth Drivers
- ❖ Focus on Gas Logistics
- ❖ Key Issues and Challenges
- ❖ Outlook and Projections

14. Cold Chain, Cold Storage and Reefer Containers

- ❖ Size and Growth
- ❖ Reefer Container Services/Facilities (Trains, Ports, Airports)
- ❖ Key Government Schemes and Initiatives
- ❖ Key Trends and Developments
- ❖ Demand for Palettised Cold Storages
- ❖ Market Structure and Key Players
- ❖ Completed and Ongoing Cold Chain Projects
- ❖ Focus on Agri and Pharma Logistics
- ❖ Growth Drivers
- ❖ Key Issues and Challenges
- ❖ Outlook and Projections

SECTION IV: LOGISTICS INFRASTRUCTURE: GROWTH, PLANS AND OUTLOOK

15. Container Freight Stations (CFSs)/ Inland Container Depots (ICDs)

- ❖ Size and Growth
- ❖ Key Trends and Developments
- ❖ Impact of Direct Port Delivery on CFSs/ICDs
- ❖ Market Structure and Key Players
- ❖ Growth Drivers
- ❖ Upcoming Projects
- ❖ Key Issues and Challenges
- ❖ Outlook and Projections

16. Logistics Parks/Multi-modal Logistics Parks

- ❖ Size and Growth
- ❖ Revenue Model and Revenue Potential for Developers
- ❖ Key Trends and Developments
- ❖ Market Structure and Key Players
- ❖ Growth Drivers
- ❖ Upcoming Projects
- ❖ Key Issues and Challenges

17. Free Trade Warehousing Zones

- ❖ Size and Growth
- ❖ Key Trends and Developments
- ❖ Market Structure and Key Players
- ❖ Growth Drivers
- ❖ Upcoming Projects
- ❖ Key Issues and Challenges
- ❖ Segment Outlook

18. Container Market

- ❖ Size and Growth
- ❖ Container Traffic Comparison (Waterways vs. Railways)
- ❖ Trade Performance
- ❖ Role of Technology, Digitisation and Automation
- ❖ Container Manufacturing Scenario
- ❖ Role of Container Train Operators
- ❖ Policy Enablers and Demand Drivers
- ❖ Key Issues and Challenges
- ❖ Market Outlook

SECTION V: SUPPLY CHAIN MANAGEMENT: MARKET SIZE, INITIATIVES AND PROJECTIONS

19. 3PL, 4PL and Reverse Logistics

- ❖ Market Size and Growth
- ❖ Key Trends and Developments
- ❖ Demand Drivers
- ❖ Major Players
- ❖ Issues and Challenges
- ❖ Segment Outlook and Projections

20. Express Logistics

- ❖ Market Size and Growth
- ❖ Key Trends and Developments
- ❖ Business Models
- ❖ Industry Landscape
- ❖ Key Players and their Future Plans
- ❖ Role and Potential of EVs
- ❖ Issues and Challenges
- ❖ Growth Drivers
- ❖ Segment Outlook and Projections

21. Freight Forwarding

- ❖ Market Size and Growth
- ❖ Key Trends and Developments
- ❖ Demand Drivers
- ❖ Major Players
- ❖ Issues and Concerns
- ❖ Segment Outlook and Projections

SECTION VI: DEMAND FROM USER INDUSTRIES

22. Key End User Industries

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

Each of the above industries will include size and growth, trends and developments, logistics and warehousing needs and requirements, and industry outlook

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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Contact details:

Raktima Majumdar
Senior Manager-Information Products
India Infrastructure Publishing Pvt. Ltd.,
B-17, Qutab Institutional Area, New Delhi - 110 016, India
Mobile: **+91 8826127521**
Email: majumdar.raktima@indiainfrastructure.com