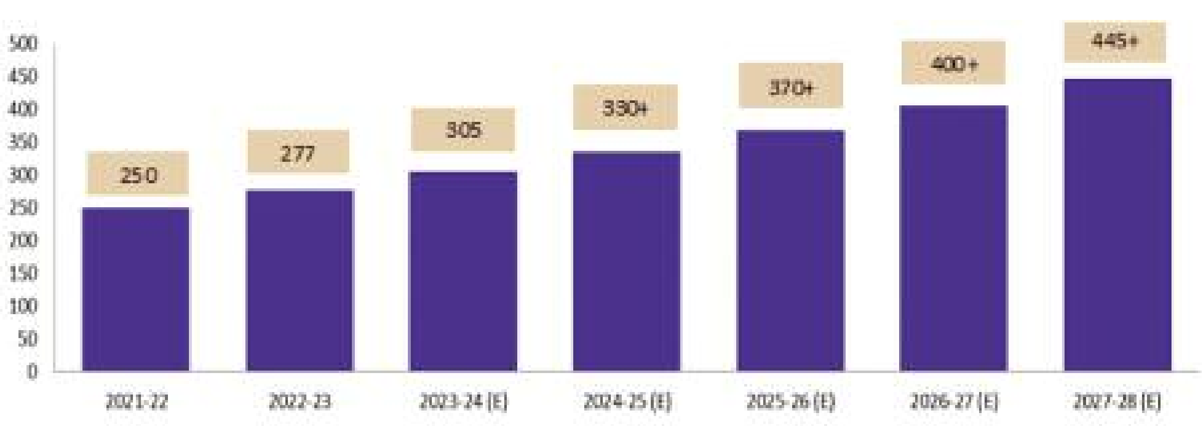
Report Summary and Key Insights

- The Indian logistics industry has been witnessing accelerated growth over the past few years led by policy reforms, digital transformation and creation of support infrastructure. The sector is going through a paradigm shift and seeing several positive developments. The government has launched key initiatives including Gati Shakti Master Plan and 100 critical transport infrastructure projects for first and last-mile connectivity, to reduce the country's logistics cost and ramping up infrastructure.
- The logistics market, pegged at ~$250 billion, is expected to grow at a CAGR of 10-12%. The shift to organised from the unorganised sector (~90% currently) would be an additional propeller. The demand for value added services such as 3PL and express is on the rise. Nearly one-third of India's logistics costs is transport and storage related inefficiencies. The government targets to bring down the logistics cost from around 13% of the GDP to 8% in the times to come.
- The warehousing industry has evolved over the past few years with a rising focus on large and sophisticated warehouses. Significant institutional investments are being seen in this space owing to the buoyant demand from 3PL, e-commerce and FMCG and strong policy support including infrastructure status to the logistics sector as well as the launch of the National Logistics Policy.
- The growth of the country's container market is being fuelled by the rising demand for containerised commodities, development of container terminals and digitisation in container shipping. That said, high dependence on imported containers continues to remain a cause of concern for Indian exporters. Domestic manufacturing of shipping grade containers requires significant push from the government to break China's monopoly in this space.
- Technology is playing a crucial role in optimising warehousing functions. Robotics, warehouse management system, automated conveyer belt, automated storage and retrieval system, etc. are some of the solutions helping in improving speed and efficiency. Green warehousing is also picking up as a concept. Sustainable construction materials are being used for interiors, cool roofing and solar panels for exteriors, and wastewater treatment and rainwater harvesting for water conservation.
- India's cold chain industry has witnessed strong momentum owing to growth in sectors such as agriculture and pharmaceuticals. Growth in cloud kitchens and online pharmacies is further creating demand for cold chain storage. Technologies such as AI, IoT, RFID, GPS tracking, temperature monitoring are increasingly being deployed in cold chain storage and related transportation. The industry, however, continues to face challenges such as fragmented market, high operating cost, lack of technical standards and equipment failure.
- Going forward, China+1 strategy and production-linked incentives will pave way for greater manufacturing activity in the country, stimulating demand for warehouses. Multi-storey warehousing and multi-purpose cold storage facilities will emerge as the future of warehousing.
- 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 will contribute significantly to country's logistics sector growth. The industry is expected to cross $450 billion by 2030, presenting a host of opportunities for logistics service providers, warehouse developers, technology providers, material and equipment suppliers, etc.

Projected Size of the Logistics market ($ billion)



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❖ Cement

❖ Steel

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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