

# STORAGE INFRASTRUCTURE IN INDIA 2020

Market Insights, Trends, Opportunities and Outlook

- ❖ Report (PDF)
- ❖ Data-set (Excel)

## The Storage Infrastructure in India 2020 report will help you:

- ❖ Analyse the market trends, key developments and noteworthy initiatives
- ❖ Gain insights into the evolving storage needs and requirements of various industries
- ❖ Track the progress of upcoming projects
- ❖ Identify upcoming opportunities and growth avenues
- ❖ Understand the best practices and technology solutions being deployed across segments
- ❖ Support business planning and strategies

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India's logistics and storage segments are undergoing transform. Organised warehousing is gaining traction owing to the increase in regulatory requirements and the demand for economic efficiencies by new businesses. GST has made way for the hub and spoke model of warehousing, which is both cost-effective and operationally efficient. The segment has also seen a surge in private equity activity over the years with the participation of a wide range of foreign investors. Agriculture warehousing has also received a lot of attention in recent times. The government has proposed the provision of viability gap funding for setting up warehouses at the block level. The development of warehouses on a PPP basis has also been proposed. The 3PL and e-commerce players are the biggest market of organised warehousing. Storage demand in Tier II cities is rising, as user industries, third-party logistics (3PL) companies and e-commerce players are rapidly expanding into these areas owing to increasing consumer demand, low rentals and improving transport connectivity.

## EXECUTIVE SUMMARY

### SECTION I: CAPACITY GROWTH, EMERGING TRENDS AND KEY PROJECTIONS

#### 1. Segment Overview

- ❖ Market Size and Growth
- ❖ Industry Structure
- ❖ Policy and Regulatory Framework
- ❖ Recent Trends and Developments
- ❖ Major Warehousing Hubs
- ❖ Upcoming Projects and Investments
- ❖ Issues and Challenges
- ❖ Outlook and Projections (2024-25)

#### 2. New Initiatives and Capacity Addition Plans

- ❖ Key Budget 2020 Announcements
- ❖ Viability Gap Funding for Warehouse Development
- ❖ Warehouse Infrastructure Fund
- ❖ National Cold Storage Grid by the Railways
- ❖ National Warehousing Grid
- ❖ Kisan Rail through PPPs - Refrigerated Coaches in Express and Freight Trains
- ❖ Mapping & Geo-Tagging of Storage Facilities by NABARD (Warehouses & Cold Storages)
- ❖ Advanced Storage Solutions
- ❖ Village Storage Scheme

#### 3. Market Outlook and Projections (Till 2025-26)

- ❖ Policy and Regulatory Outlook
- ❖ Investment Projections
- ❖ Warehousing and Storage Projections
- ❖ Key Upcoming Projects
- ❖ Big-ticket Opportunities to Look Out For: 2020 and Beyond

This section will also feature industry opinion and perspective on the impact of Covid-19 on storage infrastructure

#### 4. Investment Scenario

- ❖ Trends in Investment
- ❖ Key Recent Deals and Transactions
  - Private Equity
  - Mergers and Acquisitions
  - IPOs
- ❖ Key Successful Exits
- ❖ Upcoming Opportunities for Investors
- ❖ Risks and Returns
- ❖ Investment Outlook

### SECTION II: STORAGE INFRASTRUCTURE: SEGMENT ANALYSIS, OPPORTUNITIES AND PROJECTIONS

#### 5. Agricultural Warehousing

- ❖ Size and Growth
- ❖ Government Schemes/Initiatives
- ❖ Key Trends and Developments
- ❖ Private Entrepreneurs Guarantee (PEG) Scheme
- ❖ Market Structure and Key Players
- ❖ Growth Drivers
- ❖ Key Issues and Challenges
- ❖ Outlook and Projections

#### 6. Industrial Warehousing

- ❖ Size and Growth
- ❖ Key Trends and Developments
- ❖ Market Structure and Key Players
- ❖ Smart Warehouses
- ❖ Growth Drivers
- ❖ Key Issues and Challenges
- ❖ Outlook and Projections

**7. Cold Storages, Cold Chain and Reefer Containers**

- ❖ Size and Growth
  - Pack Houses/Integrated Pack Houses
  - Reefer Vans
  - Bulk Coolers
  - Individually Quick Frozen Units
  - Chilling/Freezing Infrastructure
- ❖ Government Schemes/Initiatives
- ❖ Key Trends and Developments
- ❖ Market Structure and Key Players
- ❖ Key Issues and Challenges
- ❖ Outlook and Projections

**8. Silo Storage**

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

**9. Liquid Storage: Crude Oil and Petroleum**

- ❖ Size and Growth
- ❖ Key Trends and Developments
- ❖ Key Growth Drivers
- ❖ Key Issues and Challenges
- ❖ Outlook and Projections

**10. Gas Storage: Domestic Gas and LNG**

- ❖ Size and Growth
- ❖ Key Trends and Developments
- ❖ Key Growth Drivers
- ❖ Key Issues and Challenges
- ❖ Outlook and Projections

**SECTION III: WAREHOUSING/STORAGE MODELS****11. 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

**12. Logistics Parks/Multi-modal Logistics Parks**

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

**13. Free Trade Warehousing Zones**

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

**SECTION IV: KEY CUSTOMERS: EVOLVING STORAGE NEEDS AND REQUIREMENTS****14. Major Consumer Segments**

- ❖ Grain Storage
- ❖ Food Processing
- ❖ Pharmaceutical
- ❖ Automobiles
- ❖ Electronics
- ❖ Chemicals
- ❖ Textiles
- ❖ Engineering goods
- ❖ Brick and mortar retail
- ❖ FMCGs

**15. Focus on E-commerce & Third Party Logistics**

- ❖ Size and Growth
- ❖ Key Players
- ❖ Key Trends and Developments
- ❖ Growth Drivers
- ❖ Warehousing Needs and Requirements
- ❖ Key Issues and Challenges
- ❖ Outlook and Projections

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