

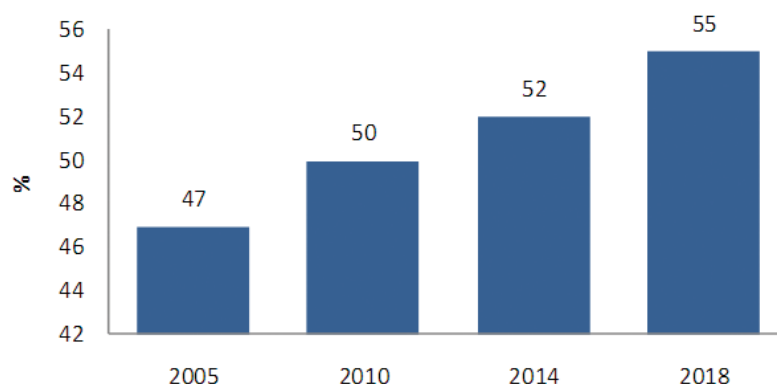
CONTAINER MARKET IN INDIA 2019

Segment Analysis, Emerging Trends, New Opportunities and Outlook

Key Takeaways

- The current modal mix for cargo transportation (including containers) is skewed towards roads, which accounts for about 60% of the total freight transported. National highways in India account for 2% of the network and carry 40% of the traffic on Indian roads.
- Achieving an optimal modal mix has been difficult due to barriers like insufficient infrastructure capacity, incomplete infrastructure connectivity, and insufficient cost advantage for efficient modes.
- The evolving trade dynamics and commodity mix have fuelled growth in the container segment. Container traffic at ports has grown at a CAGR of about 10% in the last four to five years. Major ports have lost a significant share of their container traffic to non-major ports.
- Initiatives such as the relaxation of the Cabotage Law, introduction of the Direct Port Delivery Scheme, release of guidelines for chartering of ships by providing right of first refusal to ships built in India, movement of container vessels through national waterways, and priority berthing for coastal vessels at ports will lead to efficiency gains and increase the container traffic handled at ports.
- At present, container trade volumes account for over 55% of India's merchandise trade. Growth in container trade volumes is expected to continue in the medium to long term as a result of increasing container penetration and growth in trade.
- However, ports continue to grapple with issues related to hinterland connectivity, high tariffs and transshipment costs, dependence on rail and road for cargo evacuation, inadequate draught, congestion, etc.
- Going forward, there is a huge growth potential for the cost-effective modes of transport, such as coastal shipping and inland water transport.
- Trends in Level of Containerisation
- With regard to railways, the share of containers in total traffic is 4-5%. Indian Railways has announced a number of initiatives to attract more container traffic. These include the expansion of the freight basket, introduction of a double-stack dwarf container service for domestic cargo through a new delivery model, and cancellation of the port congestion surcharge.
- DFCs are also poised to be game changers with feeder route facilities to connect ports directly with rail routes. Initiatives such as Make in India, Skill India and Digital India will continue to push the creation of a robust logistics framework in the country.
- Meanwhile, low level of mechanisation and digitisation, lack of skilled labour and sufficient support infrastructure, low performance standards and regulatory obstacles continue to impact efficiency. Technologies such as cloud computing, IoT and Block Chain can be adopted to smoothen the pace of operations.
- Improving efficiency of the logistics sector is of high importance for the country's economy as it boosts economic growth, grows exports through global supply chains and generates employment.

Trends in Level of Containerisation



EXECUTIVE SUMMARY

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