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LOGISTICS IN INDIA 2020

Future Needs, Emerging Trends and New Opportunities

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

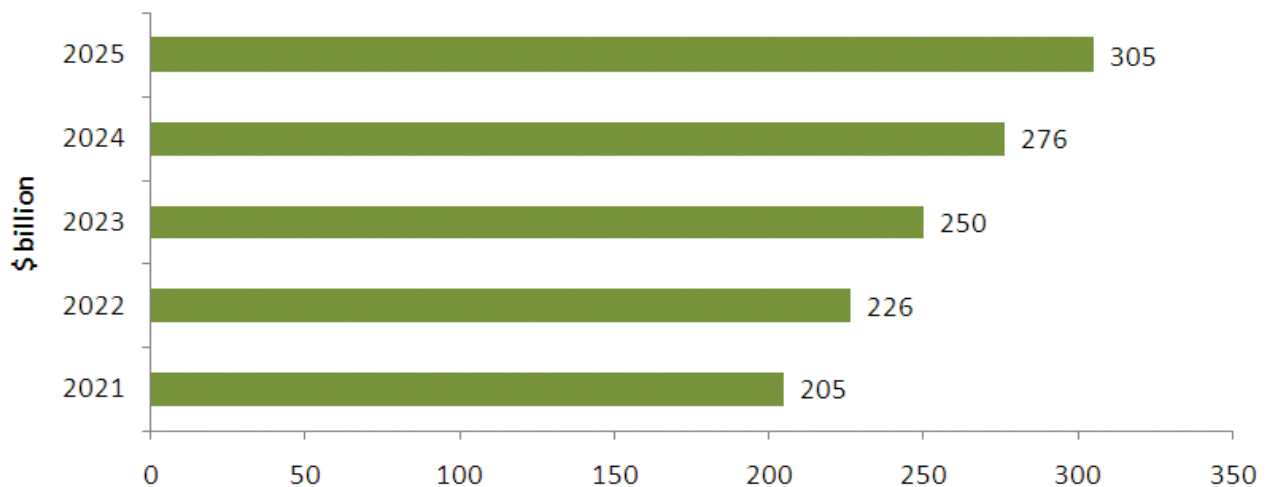
India Infrastructure Research has recently released the latest edition of the Logistics in India 2020 report. The report covers:

- ❖ Emerging trends, key developments, recent government initiatives and investment needs across segments
- ❖ Impact of Covid-19 on logistics demand, businesses, investments, and warehousing
- ❖ Technology initiatives and automation requirements post Covid-19
- ❖ Outlook and upcoming opportunities for various stakeholders and other emerging requirements

Report Summary and Key Insights

- ◆ The Indian logistics sector is on the cusp of revolution. There is a lot of emphasis on reducing the logistics cost from the current 14% to 9-10% of the GDP. The soon-to-be-unveiled National Logistics Policy also aims at enabling seamless transport of goods across the country.
- ◆ The highly skewed modal transportation mix (road transport occupies 60% share in freight movement) is expected to change with the development of freight corridors and inland waterways being tapped.
- ◆ The \$190-billion logistics market had been witnessing high growth in the past 3-4 years but the momentum somewhat slowed down due to the COVID-19 outbreak.
- ◆ However, the logistics industry has shown resilience vis-à-vis other sectors such as aviation, tourism, etc. Recovery of road and rail freight traffic to close to pre-Covid levels between July and August 2020 is a positive.

Logistics Market Size Projections (\$ billion)



Source: India Infrastructure Research

- ◆ The fact that the logistics industry has risen to the occasion to service customer needs, despite COVID-19 uncertainties, indicates that the industry is resilient enough to make a relatively faster recovery and emerge stronger.
- ◆ The logistics industry is poised to strengthen on the back of gradually improving domestic demand and a revival in the manufacturing sector post the COVID-19 crisis.
- ◆ The government is currently working on the National Logistics Policy in order to promote seamless movement of goods across the country, the implementation of which is expected to augment investment in the sector significantly.
- ◆ The industry today is at the cusp of technology-led solutions, which, in the forthcoming period, will usher in greater efficiency in operations, thereby ensuring better quality of services and customer management.
- ◆ The government too has highlighted priority areas for the sector and aims to develop an Integrated Logistics Action Plan as part of the upcoming National Logistics Policy. The DFCs and the DMIC are being touted as the biggest drivers of change. Additionally, initiatives such as Make in India and Atmanirbhar Bharat will continue to push the creation of a robust logistics framework in the country.
- ◆ Further, growth in the cold chain and container segments is also expected to boost the logistics industry. Meanwhile, with more players joining the e-commerce bandwagon, the sector is set to witness a new phase of growth.

SUMMARY AND KEY INSIGHTS

SECTION I: CURRENT SCENARIO, NEW GROWTH AREAS AND KEY PROJECTIONS

1. Trends, Developments and Outlook

- ❖ Macroeconomic Scenario and Growth Projections
- ❖ Covid-19 and Its Implication for Logistics
- ❖ Trends and Developments
- ❖ Logistics Sector Size and Growth
- ❖ Impact of Infrastructure Status and GST
- ❖ Modal Transportation Mix: Current and Expected
- ❖ Growth Drivers
- ❖ Emerging Needs and Requirements
- ❖ Issues and Challenges
- ❖ Outlook and Projections (2020-21 to 2024-25)

2. Impact of COVID-19 on Logistics: Short, Medium and Long-term

- ❖ Impact on:
 - Supply Chain
 - Input Costs
 - Labour Supply
 - Demand
 - Warehousing Supply and Leasing Activity
 - Business, Earnings, Pricing and Profitability
 - Consumer Preferences
 - Project Developers
 - Investments and Debt Availability
- ❖ Emerging Opportunity Areas
- ❖ Strategies and Mitigation Measures

3. Draft National Logistics Policy: Expected Impact and Industry Expectations

- ❖ Key Objectives
- ❖ Focus Areas
 - National Logistics Action Plan
 - National Logistics e-Marketplace
 - Data and Analytics Centre
 - Optimisation of Modal Mix

- Reduction in Logistics Costs
- Model Logistics Corridors
- Commodity Specific Interventions
- Infrastructure Creation (MMLPs/LPs/Warehouses)

- ❖ Industry Response and Expectations
- ❖ Expected Timelines

4. Freight Traffic Analysis and Projections In Light of Covid-19

- ❖ By Mode
- ❖ By Region
- ❖ By Origin and Destination
- ❖ By Type of Containerised Commodity
- ❖ Capacity/Network Addition
- ❖ Freight Rates

5. Re-assessment of the Market Outlook: New Requirements & Opportunities

- ❖ Policy and Regulatory Outlook Post COVID-19
- ❖ Investment Projections and Outlook
- ❖ Emerging Growth Areas and Requirements
 - Automation and IT
 - Sourcing Strategies
 - State-of-the-art Warehouses
- ❖ Key Upcoming Projects: A Realistic Assessment
- ❖ Impact and Timelines of Upcoming Infrastructure (DFC, DMIC, NWS, Jal Marg Vikas Project, etc.)
- ❖ Big-ticket Opportunities to Look Out For: 2020 and Beyond
- ❖ Industry Responses and Views

6. Private Players' Plans, Performance and Strategies

- ❖ Snapshot of Operations
- ❖ Financial Performance
- ❖ Returns & Profitability
- ❖ Initiatives Undertaken During Covid-19
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- ❖ Key Recent Deals and Transactions
- ❖ Private Equity
- ❖ Mergers and Acquisitions
- ❖ Key Successful Exits
- ❖ Historical and Expected Rates of Returns
- ❖ Upcoming Opportunities for Investors
- ❖ Risks in Light of Covid-19
- ❖ Investment Outlook and Projections

- ❖ Impact of Covid-19 on Operations
- ❖ Pricing Trends
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- ❖ Outlook and Market Opportunities
- ❖ Investment Requirement
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- ❖ Government Schemes and Initiatives
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- ❖ Outlook and Market Opportunities
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- ❖ Engineering Goods
- ❖ Brick and Mortar Retail
- ❖ Cement
- ❖ Steel

Each of the above industries includes Size and Growth, Trends and Developments, Logistics and Warehousing Needs and Requirements, Industry Outlook and Issues and Challenges.

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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