

Container Market in India 2021

Analysis, Insights, Business Opportunities and Outlook

- ❖ Research Report
- ❖ Data-set (Excel)

The 2021 edition of the report will help you:

- ❖ Analyse the emerging trends and developments in the container segment
- ❖ Gauge the impact of COVID-19 on container traffic, projects and upcoming investments
- ❖ Understand the key market segments (road, rail, port and inland waterways)
- ❖ Track the progress of big-ticket programmes/projects
- ❖ Gain insight into future outlook and projections
- ❖ Identify the new opportunities for operators, contractors, technology and equipment providers and material suppliers.
- ❖ Get access to detailed profiles of container operators/terminals

Container movement through railways and ports in India continues to present a huge untapped opportunity. The share of containers in the total rail traffic is around 5 per cent while that in port traffic is about 21 per cent. Railways have witnessed a gradual increase in the share of containers in total traffic. Container traffic carried by Indian Railways (IR) has grown at a CAGR of 7 per cent from 2015-16 to 2019-20. Over the years, IR has announced a number of initiatives including expansion of the freight basket, introduction of a double-stack dwarf container service for domestic cargo through a new delivery model, and cancellation of port congestion surcharge. Meanwhile, container traffic at major ports has grown at a CAGR of about 5 per cent from 2015-16 to 2019-20. A number of initiatives such as the relaxation of the cabotage law, introduction of the direct port delivery (DPD) scheme, duty exemption for Indian-flagged container vessels, and reduction of GST on bunker fuels from 18 per cent to 5 per cent have contributed substantially towards an increase in the volumes. The focus has also been on attracting more traffic through coastal shipping and IWT routes. Overall, upcoming infrastructure under programmes such as Sagarmala, DFC, DMIC, and Jal Marg Vikas will provide ample opportunities for the growth of container traffic and capacity.

Summary and Insights

SECTION I: TRENDS, ANALYSIS, NEW OPPORTUNITIES AND FUTURE PROJECTIONS

1. Market Trends and Current Scenario

- ❖ Macroeconomic Indicators
- ❖ Trade Performance
- ❖ Trends in Level of Containerisation
- ❖ New Growth Areas and Emerging Trends
- ❖ Role of Technology, Digitisation and Automation
- ❖ Policy Changes and Expected Impact
 - GST Regime and E-way Bill
 - National Logistics Policy
 - Cabotage Law Relaxation and DPD Scheme
 - Revised Tariff Guidelines for Private Terminal Operators
 - Freight Any Kind (FAK) Tariff Regime for Rail Containers
- ❖ Experience with the Logistics Data Bank System
- ❖ Issues and Challenges
- ❖ Outlook for Container Volumes

2. Impact of COVID-19 on Volumes, Capacity Addition Plan and Investments

- ❖ Impact on Container Volumes
- ❖ Impact on Projects and Capacity Addition Plans
 - Ongoing and Recently Awarded Projects
 - Upcoming Projects
 - Under Bidding Projects
- ❖ Invocation of Force Majeure and Contract Renegotiation
- ❖ Impact on Input Costs and Supply Chain
- ❖ Impact on Operator Revenues
- ❖ Impact on Investments
- ❖ Relief Measures & Recovery Strategies
- ❖ Post Covid-19 Outlook

3. Inter-Modal Analysis: Roads, Ports, Railways, Coastal Shipping and Inland Waterways

- ❖ Current Share
- ❖ Comparative Cost Estimates
- ❖ Overall Traffic Trends
- ❖ Government's Targets to Achieve an 'Optimal Modal Mix'
- ❖ Traffic and Capacity Analysis:
 - By Mode
 - By Region
 - By Origin and Destination
 - By Type of Containerised Commodity

4. Expected Impact of Dedicated Freight Corridors on Container Movement

- ❖ Project Scope & Features
- ❖ Progress So Far & Key Milestones
- ❖ Financing Experience & Funding Options
- ❖ Disruptions/Delays due to COVID-19
- ❖ Targets & Expected Timelines
- ❖ Future Benefits
- ❖ Pricing Strategies
- ❖ Issues & Challenges
- ❖ New Freight Corridors Identified
- ❖ Upcoming Contracts & Tenders
- ❖ Traffic Projections

5. Opportunities, Outlook and Projections (Till 2025-26)

- ❖ Growth Drivers
- ❖ Policy and Regulatory Outlook
- ❖ Investment Projections
- ❖ Expected Capacity/Network Additions
- ❖ Emerging Growth Areas
- ❖ Traffic Projections by Mode
 - Road
 - Rail
 - Ports
 - Others
- ❖ Key Upcoming Projects
- ❖ Big-ticket Opportunities to Look Out For: 2021 and Beyond

6. Investment Trends and Returns: Container and Allied Infrastructure

- ❖ Trends in Investment
- ❖ Key Recent Deals and Transactions
 - Private Equity
 - Mergers and Acquisitions
 - IPOs
- ❖ Key Successful Exits
- ❖ Historical and Expected Rates of Returns
- ❖ Upcoming Opportunities for Investors
- ❖ Risks in Light of Covid-19

7. Container Infrastructure Development under Other Key Programmes

- ❖ Sagarmala Programme
- ❖ Bharatmala Pariyojana
- ❖ Delhi-Mumbai Industrial Corridor
- ❖ Jal Marg Vikas Project
- ❖ 106 New NWs
- ❖ Kaladan Multi-Modal Transit Transport Project

This chapter will cover a detailed status update on these programmes, expected timelines, container infrastructure development opportunities and overall impact on container movement across the country.

SECTION II: CONTAINER MOVEMENT: SEGMENT ANALYSIS, TRENDS & OPPORTUNITIES

8. Ports

- ❖ Traffic Trends
 - By Major Ports
 - By Non-major Ports
 - By Export-Import
 - By Coast
 - By Transshipment Traffic
 - By Terminal
- ❖ Trends in Capacity Addition & Utilisation Levels
- ❖ Global Container Shipping Scenario
- ❖ Impact of Direct Port Delivery Scheme
- ❖ Initiatives to Improve Port Container Traffic in Light of COVID-19
- ❖ Upcoming Projects & Investments
- ❖ Issues & Challenges
- ❖ Outlook and Projections (Till 2025-26) - mention till what year for all sectors

9. Roads

- ❖ Size and Growth
- ❖ Existing Infrastructure
- ❖ Upcoming Projects and Planned Capacity Addition
- ❖ Cost of Container Movement
- ❖ Port-road Connectivity to Container Handling Ports
- ❖ Trucking Industry Overview
- ❖ Market Structure and Key Players
- ❖ Issues and Challenges
- ❖ Outlook and Projections (Till 2025-26)

10. Railways

- ❖ Traffic Trends
- ❖ Share of Container in IR's Freight Traffic and Earnings
- ❖ Trends in Earnings
- ❖ Port-rail Connectivity to Container Handling Ports
- ❖ Recent Developments/Initiatives
- ❖ Initiatives to Improve Rail Container Traffic in Light of COVID-19
- ❖ Container Train Operators
 - Industry Structure
 - Current Infrastructure
- ❖ Upcoming Projects and Planned Capacity Addition
- ❖ Issues and Challenges
- ❖ Outlook and Projections (Till 2025-26)

11. Coastal Shipping and Inland Waterways

- ❖ Size and Growth
- ❖ Growth of coastal and inland container traffic
- ❖ Government Schemes and Initiatives
- ❖ Impact of Covid-19
- ❖ Issues and Challenges
- ❖ Outlook and Projections (Till 2025-26)

SECTION III: OTHER LOGISTICS INFRASTRUCTURE FOR CONTAINER MOVEMENT

12. Cold Storages and Reefer Containers

- ❖ Segment Size and Growth
- ❖ Policy Framework
- ❖ Key Government Schemes and Initiatives
- ❖ Reefer Container Train Services
- ❖ Reefer Container Port Services
- ❖ Reefer Facilities at Airports
- ❖ Impact of Covid-19 and Induced Demand
- ❖ Key Players
- ❖ Growth Drivers
- ❖ Issues and Challenges
- ❖ Future Outlook and Projections

13. 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

14. 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

15. 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 PROFILES**16. Key Port Container Terminals**

- ❖ Adani CMA Mundra Terminal
- ❖ Adani Ennore Container Terminal
- ❖ Adani Hazira Container Terminal
- ❖ Adani International Container Terminal
- ❖ Adani Mundra Container Terminal
- ❖ APM Terminals Mumbai
- ❖ APM Terminals Pipavav
- ❖ Bharat Mumbai Container Terminal (Phase I)
- ❖ Bharat Kolkata Container Terminal
- ❖ Chennai Container Terminal Limited
- ❖ Chennai International Terminals Private Limited
- ❖ Dakshin Bharat Gateway Limited
- ❖ Haldia International Container Terminal
- ❖ International Container Transshipment Terminal (ICTT) Vallarpadam
- ❖ Jawaharlal Nehru Port Container Terminal
- ❖ Kandla International Container Terminal
- ❖ Kattupalli International Container Terminal
- ❖ Navayuga Container Terminal
- ❖ Mundra International Container Terminal
- ❖ New Mangalore Port Container Terminal
- ❖ Nhava Sheva International Container Terminal
- ❖ Nhava Sheva India Gateway Terminal
- ❖ PSA Sical Tuticorin Container Terminal
- ❖ Visakha Container Terminal
- ❖ Other Container Terminals

Each profile will cover details on terminal infrastructure, capacity available, traffic handled, recent technological developments, and steps taken in light of Covid-19.

17. Key Container Train Operators

- ❖ Adani Logistics Limited
- ❖ Arshiya Rail Infrastructure Limited
- ❖ Container Corporation of India Limited
- ❖ Central Warehousing Corporation
- ❖ Distribution Logistics Infrastructure Private Limited
- ❖ Gateway Rail Freight Limited
- ❖ Hind Terminals Private Limited
- ❖ IndiaLinx
- ❖ International Cargo Terminals and Rail Infrastructure Private Limited
- ❖ Kribhco Infrastructure Limited
- ❖ Pristine Logistics
- ❖ Sical Multimodal and Rail Transport Limited
- ❖ Trans Rail Logistics Limited
- ❖ Other Key Container Train Operators

Each profile will cover details on current infrastructure, services offered, operational and financial performance, steps taken in light of Covid-19, and future plans.

18. Key Road Transport Operators

- ❖ Transport Corporation of India Limited
- ❖ Allcargo Logistics Limited
- ❖ Mahindra Logistics Limited
- ❖ Future Supply Chain Solutions Limited
- ❖ Associated Road Carriers Limited
- ❖ Coastal Roadways
- ❖ Darcl Logistics
- ❖ East West Freight Carriers Private Limited
- ❖ SICAL Logistics
- ❖ Gati KWE
- ❖ Patel Roadways
- ❖ TVS Southern Roadways Limited
- ❖ DRL Logistics Private Limited
- ❖ VRL Logistics Limited
- ❖ Others

Each profile will cover details on current infrastructure, services offered, operational and financial performance, steps taken in light of Covid-19, and future plans of each company

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