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# Container Market in India 2021

Analysis, Insights, Business Opportunities and Outlook

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

India Infrastructure Research has recently released the latest edition of the Container Market in India report 2021. The report covers:

- ❖ Analysis of the market trends, key developments and outlook for the container segment
- ❖ A realistic assessment of the impact of Covid-19 on container traffic, projects and upcoming investments
- ❖ Analysis of the key market segments (road, rail, port and inland waterways)
- ❖ Update on the big-ticket programmes/projects in the container segment
- ❖ Insight into future outlook and projections
- ❖ Upcoming opportunities for operators, contractors, technology and equipment providers and material suppliers
- ❖ Detailed profiles of container operators/terminals

**INDIA INFRASTRUCTURE RESEARCH**

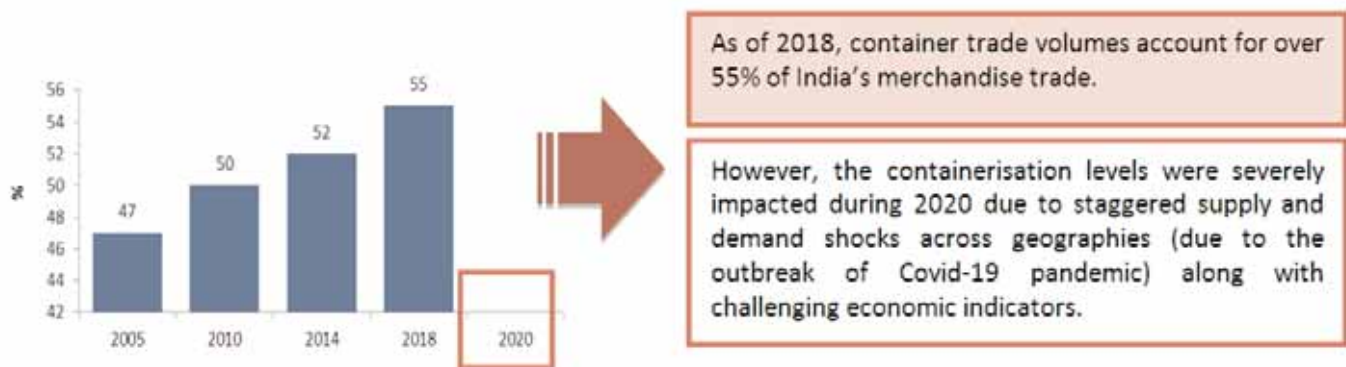
## Report Summary and Key Insights

- Container traffic at Indian ports has grown at a CAGR of about 8% between 2015-16 and 2020-21. Major ports have lost a significant share of their container traffic to non-major ports.
- In light of the increased focus given by the government, coastal traffic at Indian ports has also been registering an upward trend. It increased from 179 mt (2015-16) to 252 mt (2019-20).
- Treading on the same lines, cargo volumes transported through waterways increased at a CAGR of 15.02%, from 2015-16 to 2020-21. With regard to rail mode, container traffic increased at a CAGR of 7%, increasing from 46.2 mt in 2015-16 to 61.08 mt in 2020-21.
- The current modal mix for cargo transportation (including containers) is skewed towards roads, which accounts for about 60% of the total freight transported.
- While the share of rail transport is around 30-35%, that of water transport and air transport stands at a meagre 6% and 1-2%, respectively.
- This is still an evolving situation in the country with different modes of transport at different stages of evolution. Roads are by far the most common, with railways catching up quickly. Air freight is expensive while inland waterways have just started.
- The government aims to reduce the logistics cost from 13% of the country's GDP at present to 8% in a period of five years.
- The Draft National Logistics Policy aims at promoting seamless movement of goods across the country and create a single point of reference for all logistics and trade facilitation matters.
- In addition to improving India's rank in LPI, it also aims enhance the efficiency of logistics value chain through increased digitisation and technology adoption, and strengthen warehousing industry and improve cold storage efficiency.
- The government has not been leaving any stone unturned to augment container traffic.
- Key initiatives: Relaxation of Cabotage Law, introduction of the Direct Port Delivery scheme, release of guidelines for chartering of ships by providing right of first refusal (RoFR) 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.
- Indian Railways has announced a number of initiatives to attract more container traffic. These include the introduction of double stack long haul container train; online interface to freight customers; introduction of international freight services; rake permit validation; etc.
- Besides, the commissioning of the DFCs will further boost container traffic movement on railways.
- In the last two decades, the role of ports has transformed from being just a transit point to a delivery and custom clearance point. However, hinterland connectivity continues to be an issue as it has largely been neglected. As a result, there is multiplicity of ICDs leading to issues of fragmentation of cargo.
- Besides, complex regulatory frameworks, limited technology deployment, inadequate cargo evacuation facilities, and lack of integrated planning are among the key challenges faced by Indian ports.
- With regard to railways, lack of a level-playing field for private companies vis-a-vis CONCOR; restricted commodity basket for container train operators (CTOs); shortage of rail-linked ICDs; steady increase in haulage charges; lack of a service guarantee in terms of transit time or fixed schedule container train services; etc.; are some of the challenges faced by CTOs.
- Share of coastal shipping of containers in the overall cargo traffic handled also remains limited due to a plethora of issues. The key ones are lack of suitable infrastructure; improper last-mile connectivity; lack of availability of low cost and long maturity loans; etc.
- Covid-19 pandemic was unprecedented and unwarranted as far as the global trade is concerned. It resulted in a cascade of events which resulted in an acute shortage of shipping containers. The after-effects of this crisis were so intense that they were felt across all the global supply chains.
- Despite being allowed to operate, the port sector faced severe setbacks. Most of the container terminals in the country witnessed a negative year-on-year growth during April-August 2020 as compared to the corresponding period of the previous year.
- Container traffic at Indian ports bore the brunt of outbreak of Covid-19. While it fluctuated till September 2020, container traffic reached at pre-Covid levels and surpassed during the remaining months of 2020-21. During April-May 2021, the Indian major ports handled 41.36 mt container traffic, ~57 per cent up from April-June 2020 traffic.
- Going forward, the needs and requirements of the sector includes reducing logistics cost, and facilitating export-oriented manufacturing;

improving performance and capacity at par with international standards; improving last mile connectivity; increasing cargo movement through coastal shipping and inland waterways; increased digitalisation of port operations; development of deep draft ports; striking a balance between capacity creation and utilisation; providing first- and last-mile connectivity; and ensuring integration between different modes of transport; increasing the level of mechanisation; and providing sufficient support infrastructure; among others.

- The development of multi-modal logistics parks at strategic locations will enable efficient inter-modal freight movement. Development works are already in progress for setting up logistics parks in Sanand in Gujarat and Jogighopa in Assam.
- DFCs are also poised to be game changers with feeder route facilities to connect ports directly with rail routes. However, to fully reap the benefits of the dedicated corridors, terminals along the corridors also needs to be developed.
- Technologies such as cloud computing, IoT and Block Chain can be adopted to smoothen the pace of operations.

## Level of Containerisation (%)



Source: India Infrastructure Research

## Key Drivers of Containerisation



Source: India Infrastructure Research

## Summary and Insights

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#### 1. Market Trends and Current Scenario

- ❖ Macroeconomic Indicators
- ❖ Trade

## Summary and Insights

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- ❖ Gati KWE
- ❖ Patel Roadways
- ❖ TVS Southern Roadways Limited
- ❖ DRL Logistics Private Limited
- ❖ VRL Logistics Limited
- ❖ Others

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