

PORTS IN INDIA 2022

Trends, Developments, Opportunities and Projections

- ❖ Access to India Port Tracker
- ❖ Research Report
- ❖ Data-set (Excel)
- ❖ 52 Weekly Newsletters
- ❖ 11 Monthly Updates

The Ports in India 2022 report will cover the following:

- ❖ Sector Trends, Progress and Developments
- ❖ Pipeline of Upcoming Brownfield and Greenfield Projects
- ❖ Traffic and Capacity Projections
- ❖ Inter-port Operational and Financial Performance
- ❖ Key Players and their Plans
- ❖ Market Opportunities for Developers/Investors, Technology and Equipment Providers

The port sector has been able to retain the momentum in activity despite the disruptions on account of the pandemic. Overall, the traffic handled at ports increased at a CAGR of about 3 per cent during 2016-17 to 2020-21. While the pandemic induced disruptions led to a decline in traffic, the first half of 2021-22 showed a sharp recovery. Major ports handled 347.02 mt of traffic during April to September 2021-22, registering an increase of over 16 per cent over the corresponding period of last year. Indian ports have shown significant improvements in terms of increased draught levels, better utilisation of IT infrastructure, enhanced mechanisation and digitalisation, and reduction in congestion and waiting period at ports. In addition, substantial emphasis has been laid on the movement of containers resulting in dwell time reduction. Capacity augmentation will be a key focus area going forward as well. The Maritime Vision 2030 estimates that major ports alone need to add about 423 mt of capacity at an investment of over Rs 334 billion. Further under the Sagarmala programme 373 projects entailing an investment of about Rs 4 trillion are being implemented for port capacity development. The recently launched National Monetisation Pipeline has also highlighted a pipeline of assets worth Rs 144 billion. Clearly, the sector provides significant opportunity to all stakeholders including developers/contractors, investors, consultants and equipment/technology providers.

SECTION I: SECTOR ANALYSIS, OPPORTUNITIES AND OUTLOOK

1. Sector Progress and Key Trends

- ❖ Traffic Growth (Past Five years)
- ❖ Existing Capacity and Utilisation Analysis
- ❖ Project Award and Completion Trends (2020-21 to 2021-22)
 - Major Ports
 - Non-Major Ports
 - National Waterways
- ❖ Efficiency Trends
- ❖ Key Recent Developments
- ❖ Policy & Regulatory Initiatives
- ❖ Maritime Vision 2030
- ❖ Impact of Covid-19 on:
 - Traffic (Major, Non-Major, National Waterways)
 - Ongoing Projects and New Bids
 - Investments and Deals
 - Developers (Traffic, revenues, capex, etc.)
- ❖ Investment Requirements and Targets under NIP
- ❖ Risks and Challenges
- ❖ Sector Outlook

2. Outlook and Key Projections (Till 2026-27)

- ❖ Traffic Projections
- ❖ Capacity Addition Projections
- ❖ Investment Projections
- ❖ Project Award and Completion Targets
- ❖ Policy Outlook

3. Project Pipeline Analysis

- ❖ Assessment of Project Pipeline:
 - Short Term (By 2022-23)
 - Medium Term (By 2025-26)
 - Long Term (2026 and Beyond)
- ❖ Port-wise Analysis: Major and Non-Major Ports
- ❖ Analysis by Stage of Development

- Under Construction
- Awarded
- Announced
- Proposed/Planned

❖ Analysis by:

- Ownership
- Brownfield versus greenfield
- Coast
- State
- Completion Period

❖ Top Upcoming Projects in Terms of Investment

The detailed project pipeline will be provided in the dataset with parameters like scope of work, capacity, cost, developer, contractor, current status, expected COD, mode of implementation, etc.

4. Investment and Market Opportunities (Till 2026-27)

- ❖ Investment Opportunities Under:
 - National Infrastructure Pipeline
 - National Monetisation Pipeline
 - Mega Programmes
 - Sagarmala Programme
 - Jal Marg Vikas
 - Development of 106 National Waterways
- ❖ Market Opportunities for:
 - Project Developers
 - EPC Contractors
 - Financiers/Investors
 - Technology Providers
 - Equipment Suppliers
 - Others

5. Major Ports Authorities Act, 2021

- ❖ Salient Features
- ❖ Expected Impact
- ❖ Stakeholder/Industry Viewpoint
- ❖ Unaddressed Issues

6. Financing Trends and PPP Experience

- ❖ Key Funding Sources
- ❖ Recent Deals and Transactions
- ❖ Private Sector Experience
 - Experience So Far
 - Key Completed Projects
 - Ongoing and Upcoming PPP Projects
 - Opportunities for Global Investors
- ❖ Issues and Concerns
- ❖ Future Potential

SECTION II: PROGRESS AND OPPORTUNITIES UNDER MEGA PROJECTS**7. Sagarmala Programme**

- ❖ Targets and Key Components
- ❖ Progress under Four Components
- ❖ Project Awards and Completion
- ❖ Investment Requirements & Funding
- ❖ Future Targets & Timelines
- ❖ Big Ticket Opportunities
- ❖ Issues and Challenges
- ❖ Upcoming Tenders & Contracts

8. Jal Marg Vikas & 106 New National Waterways

- ❖ Project Overview & Progress So Far
- ❖ Project Awards and Completion
- ❖ Investment Requirements & Funding
- ❖ Future Targets & Timelines
- ❖ Big Ticket Opportunities
- ❖ Issues and Challenges
- ❖ Upcoming Tenders & Contracts

9. Key Upcoming Greenfield Ports

- ❖ Capacity & Infrastructure
- ❖ Current Status & Key Milestones
- ❖ Investment Requirements & Funding
- ❖ Capacity Addition Plans & Targets
- ❖ Future Opportunities for Key Stakeholders
- ❖ Issues and Challenges

SECTION III: TRENDS IN CAPACITY ADDITION AND COMMODITY-WISE TRAFFIC**10. Traffic Trends & Analysis**

- ❖ Growth Trends (2016-17 to 2020-21)
 - Major Ports
 - Non-Major Ports
- ❖ Export and Import Traffic Analysis
- ❖ Coast-wise Traffic Analysis
- ❖ Region-wise Traffic Analysis
- ❖ Port-wise Traffic Analysis

11. Capacity Trends & Additions

- ❖ Capacity Addition Trends (2016-17 to 2020-21)
 - Major Ports
 - Non-Major Ports
- ❖ Coast-wise Capacity Addition
- ❖ Region-wise Capacity Addition
- ❖ Capacity Addition Plans in 2021-22
- ❖ Upcoming Contracts & Tenders

12. Coal

- ❖ Trends in Coal Traffic (2016-17 to 2020-21)
 - Overall
 - Coast-wise
 - Port-wise
 - Export-Import
 - Coastal
- ❖ Trends in Capacity Additions & Utilisation Levels (2016-17 to 2020-21)
- ❖ Performance of Commodities in 2021-22
- ❖ Upcoming Projects & Investments
- ❖ Issues & Challenges
- ❖ Future Projections

13. Iron Ore

- ❖ Trends in Iron ore Traffic (2016-17 to 2020-21)
 - Overall
 - Coast-wise
 - Port-wise
 - Export-Import
 - Coastal
- ❖ Trends in Capacity Additions & Utilisation Levels (2016-17 to 2020-21)
- ❖ Performance of Commodities in 2021-22
- ❖ Upcoming Projects & Investments
- ❖ Issues & Challenges
- ❖ Future Projections

14. POL

- ❖ Trends in POL Traffic (2016-17 to 2020-21)
 - Overall
 - Coast-wise
 - Port-wise
 - Export-Import
 - Coastal
- ❖ Trends in Capacity Additions & Utilisation Levels (2016-17 to 2020-21)
- ❖ Performance of Commodities in 2021-22
- ❖ Upcoming Projects & Investments
- ❖ Issues & Challenges
- ❖ Future Projections

15. Containers

- ❖ Trends in Container Traffic (2016-17 to 2020-21)
 - Overall
 - Coast-wise
 - Port-wise
 - Export-Import
 - Coastal
- ❖ Trends in Capacity Additions & Utilisation Levels (2016-17 to 2020-21)
- ❖ Performance of Commodities in 2021-22
- ❖ Upcoming Projects & Investments
- ❖ Issues & Challenges
- ❖ Future Projections

16. Fertilisers

- ❖ Trends in Fertiliser Traffic (2016-17 to 2020-21)
 - Overall
 - Coast-wise
 - Port-wise
 - Export-Import
- ❖ Trends in Capacity Additions & Utilisation Levels (2016-17 to 2020-21)
- ❖ Performance of Commodities in 2021-22
- ❖ Upcoming Projects & Investments
- ❖ Issues & Challenges
- ❖ Future Projections

17. Efficiency Indicators and Financial Performance

- ❖ Average Turnaround Time
- ❖ Average Pre-berthing Time
- ❖ Average Output per Ship per Day
- ❖ Per Tonne Handling Cost
- ❖ Total Operating Income and Expenditure
- ❖ Net Surplus and Operating Surplus
- ❖ Operating Ratio

18. Trends in Port Charges and Tariffs

- ❖ Port Logistics Costs
- ❖ Shipping Operating Costs
- ❖ Existing Port Tariffs/Charges
- ❖ Recent Tariff Revisions
- ❖ Tariff Guidelines for Major Ports
- ❖ Issues and Concerns
- ❖ Recommendations to Lower Port Tariffs/Charges

SECTION IV: FOCUS ON KEY SEGMENTS

19. Port Connectivity

- ❖ Current Trends in Mode of Evacuation of Cargo
- ❖ Experience so Far
 - Rail-Port Connectivity Projects
 - Road-Port Connectivity Projects

- ❖ Investment Requirements
- ❖ Upcoming Projects & Tenders
- ❖ Impact of DFC on Rail-Port Connectivity
- ❖ Key Issues and Challenges

20. Inland Waterways

- ❖ Existing Infrastructure
- ❖ Traffic Trends
- ❖ Recent Developments
- ❖ Indo-Bangladesh Protocol
- ❖ International Agreements for Use of Waterways
- ❖ Key Ongoing and Upcoming Projects
- ❖ Key Issues and Concerns
- ❖ Traffic Projections (till 2026-27)
- ❖ Investment Requirements
- ❖ New Opportunities
- ❖ Segment Outlook

21. Coastal Shipping

- ❖ Traffic Trends
 - Overall Traffic
 - Major and Non-major Split
 - Port-wise
 - Commodity-wise
 - Coast-wise
- ❖ Key Government Schemes and Initiatives
- ❖ Industry Structure and Key Players
- ❖ Fleet Size of Indian Shipping Industry
 - No. and Tonnage of Vessels
 - Type- and Age-wise
- ❖ Recent Developments
- ❖ Growth Drivers
- ❖ Key Issues and Concerns
- ❖ Traffic Projections (till 2026-27)
- ❖ Segment Outlook

22. Port Modernisation & Digitalisation

- ❖ Ease of Doing Business Initiatives
 - Port Community System
 - Logistics Data Bank
 - Direct Port Delivery & Direct Port Entry
 - RFID
 - Container Scanners
 - Procurement of Advanced Equipment
- ❖ Technology & Equipment Providers
- ❖ Digital Solutions & Initiatives
- ❖ Nex-Gen Technologies (AI, ML, Robotics, etc.)

23. New Opportunity Areas

- ❖ Roll-on, roll-off (Ro-ro)
- ❖ Cruise Shipping
- ❖ Port-led Industrial Cities
- ❖ LNG Terminals
- ❖ Renewable Energy
- ❖ Multi-modal Logistics Parks
- ❖ Free Trade Warehousing Zones
- ❖ Shipbuilding and Ship-repair

SECTION V: KEY PROFILES**24. Major Port Profiles**

- ❖ Chennai Port
- ❖ Cochin Port
- ❖ Deendayal Port (erstwhile Kandla Port)
- ❖ Jawaharlal Nehru Port Trust
- ❖ Kamarajar Port
- ❖ Syama Prasad Mookerjee Port (erstwhile Kolkata Port)
- ❖ Mumbai Port
- ❖ Mormugao Port
- ❖ New Mangalore Port
- ❖ Paradip Port
- ❖ V.O. Chidambaranar Port
- ❖ Visakhapatnam Port

Each port profile will cover current infrastructure, traffic trends, modal split, vessel traffic, financial performance, efficiency indicators, key projects and upcoming opportunities.

25. Non-Major Port Profiles

- ❖ Angre Port
- ❖ Dahej Port
- ❖ Dhamra Port
- ❖ Dighi Port
- ❖ Gangavaram Port
- ❖ Gopalpur Port
- ❖ Hazira port
- ❖ JSW Jaigarh Port
- ❖ Kakinada Seaports
- ❖ Karaikal Port
- ❖ Kattupalli Port
- ❖ Krishnapatnam Port
- ❖ Mundra Port
- ❖ Port of Pipavav

Each port profile will cover current infrastructure, traffic trends, financial performance (wherever available), key projects and upcoming opportunities.

26. Key Players

- ❖ Adani Ports and Special Economic Zone Limited
- ❖ APM Terminals
- ❖ Essar Ports Limited
- ❖ DP World
- ❖ GMR Group
- ❖ JM Baxi
- ❖ JSW Infrastructure and Logistics Limited
- ❖ Larsen & Toubro Limited
- ❖ Navayuga Engineering Company Limited (NECL)
- ❖ PSA International
- ❖ Shapoorji Pallonji Group

This chapter will cover profiles of 10 top project developers/EPC contractors in the ports sector

SECTION VI: DATABASE OF KEY PROJECTS

The database includes upcoming projects (ongoing and planned) in the sector with details on project name, segment/component, cost, capacity, location, implementing agency, current status, mode of implementation, etc.

Monthly Updates

The 11 monthly updates will comprise 16-24 pages on:

- Analysis of Traffic at Major Ports
- Commodity-wise Traffic at Major Ports
- Fleet Size of the Indian Shipping Industry (No. of vessels and tonnage)
- Project Update (Major & Non-Major Ports)
- Upcoming Tenders (Major & Non-Major Ports)
- New Project Announcements (Container terminals, berths, road & rail connectivity, inland waterways, dredging, etc.) for Major & Non-Major Ports
- Key Data and Statistics

Weekly Newsletters

The 52 weekly newsletters will comprise 4-6 pages.

They will cover new developments in the port sector relating to:

- Policy Announcements
- Government Initiatives
- Project Completions/Awards/Announcements
- Update on Key Programmes
- Key Financings
- Technology Initiatives
- Etc.

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