

# DREDGING IN INDIA 2018

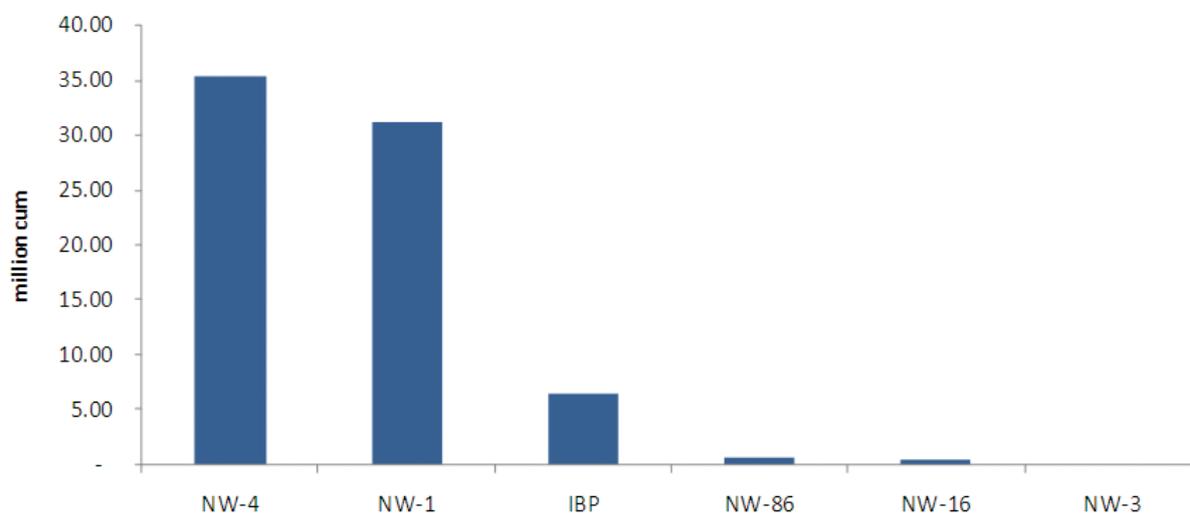
Market analysis, New Opportunities and Outlook

- ❖ Report (PDF)
- ❖ Data-set (Excel)

## Key Takeaways

- Worldwide, ship sizes are increasing to achieve economies of scale. As a result, there have been major investments in deepening the channel for ships, and expansion and development of new ports, which, in turn has led to an increased demand for dredging.
- With various maritime programmes such as Sagarmala and the Jal Marg Vikas, the union government is focusing on creating as well as maintaining deeper depths at ports and inland waterways.
- During 2013-14 to 2017-18, maintenance dredging to the tune of 354.78 million cum was carried out across all ports and NWs at an estimated investment of at least Rs 47.58 billion. Capital dredging to the tune of 302.46 million cum was carried out across all Indian ports and NWs at an estimated investment of at least Rs 65.64 billion.
- Based on projects tracked by India Infrastructure Research, a total of 39 projects are planned to be taken up in the future. About 203.21 million cum material will be dredged. Inland waterways also offer substantial dredging opportunities. A total of 16 dredging projects worth Rs 10.45 billion are planned to be taken up in future. About 74.77 million cum of quantity will be dredged under these projects.
- Apart from the core sectors, ports and inland waterways, contractors are exploring opportunities in dredging at shipyards and fishing harbours, dredging for the oil and gas sector, shallow water dredging, waterfront development, offshore mining, beach nourishment, land reclamation activities, etc. According to India Infrastructure Research, approximately 42 dredging projects involving dredging of 1.30 million cum are planned to be taken up in these areas.
- Given the robust project pipeline, substantial opportunities are expected to open up in the next few years, driven by a focus on the development of ports and inland waterways, and growing demand from other areas.
- That said, inherent complexities in the sector such as high costs for dredging, shortage of qualified and certified dredging personnel, limited knowledge of dredging contracts, lack of proper soil investigations, and environmental impact of dredging, etc. need to be addressed in a timely manner to realise the true potential of the sector.

### Future Dredging Requirements in NWs till 2023



## Executive Summary

### 1. Dredging Market Overview

- ❖ Size and Growth
- ❖ Key Trends
- ❖ Recent Developments
- ❖ Major Players
- ❖ Key Growth Drivers
- ❖ Issues and Challenges
- ❖ Future Dredging Requirements
- ❖ Future Outlook

### 2. Policy Framework and Contracting Practices

- ❖ Policy Framework
- ❖ New Dredging Guidelines
- ❖ Impact of GST
- ❖ Regulatory Developments
- ❖ Disinvestment in DCI
- ❖ Type of Contract
- ❖ Current Contracting Practices
- ❖ Global Best Practices

### 3. Segment Focus - Maintenance Dredging

- ❖ Size and Growth
  - Major Ports
  - Non-major Ports
  - National Waterways
- ❖ Key Completed Projects
- ❖ Key Ongoing Projects
- ❖ Future Requirements
- ❖ Key Upcoming Projects

### 4. Segment Focus - Capital Dredging

- ❖ Size and Growth
  - Major Ports
  - Non-major Ports
  - National Waterways
- ❖ Key Completed Projects
- ❖ Key Ongoing Projects
- ❖ Future Requirements
- ❖ Key Upcoming Projects

### 5. Dredging Cost Economics

- ❖ Experience So Far
- ❖ Factors Impacting Project Viability
- ❖ Key Cost Components
- ❖ Funding Sources
- ❖ New Funding Options
- ❖ Investment Projections

### 6. Key Government Programmes

- ❖ Snapshot of Key Government Initiatives
- ❖ Sagarmala Initiative
- ❖ Jal Marg Vikas Project (JMVP)
- ❖ National Mission for Clean Ganga

### 7. Market Opportunities (till 2024-25)

- ❖ Project Pipeline Analysis
  - Under Key Schemes/Programmes
  - For Major Ports
  - For Non-major Ports
  - By IWAI
- ❖ Market Opportunities for Key Stakeholders
- ❖ Project Pipeline Analysis - Key Dredging Projects
- ❖ Sector Outlook

## 8. Risks and Challenges

- ❖ Policy, Fiscal and Regulatory Issues
- ❖ Contractual Issues
- ❖ Environmental Concerns
- ❖ Financing Issues
- ❖ Absence of Dredger Building and Repair Facilities
- ❖ Manpower Issues
- ❖ Inadequate Survey and Investigation
- ❖ Other Issues
- ❖ Specific Issues faced by IWAI

## 9. Dredger Market

- ❖ Overview
  - Type of Dredgers
  - Application and Functionalities of Dredgers
- ❖ Current Size
  - Domestic Players
  - Global Players Active in Indian Dredging Segment
- ❖ Key Suppliers
- ❖ Import of Dredgers
- ❖ Regulatory Framework
- ❖ Market Trends
- ❖ Advancements and New Innovations
- ❖ Indigenous Manufacturing
  - Experience So far
  - Future Potential
- ❖ Segment Outlook

## 10. Other Equipment Requirements

- ❖ Type of Equipment
  - Key Dredging Equipment
  - Equipment Used for CSDs and TSHDs

- ❖ Key Suppliers
- ❖ Import of Dredging Equipment
- ❖ Advancements and Developments in Technology
- ❖ Segment Outlook

## 11. Emerging Areas of Growth

- ❖ Overview
- ❖ Experience So Far
- ❖ Key Completed Projects
- ❖ Key Ongoing Projects
- ❖ Key Upcoming Projects

## 12. Profiles of Major Players

- ❖ Public Sector
  - Dredging Corporation of India Limited
- ❖ Private Sector (Domestic Players)
  - Adani Ports and Special Economic Zone Limited
  - Amrut Dredging and Shipping Limited
  - Dharti Dredging and Infrastructure Limited
  - IMS Ship Management Private Limited
  - International Seaport Dredging Private Limited
  - KSR Marine Services Private Limited
  - Meka Dredging Company Private Limited
  - Mercator Limited
  - Rock and Reef Dredging Private Limited
- ❖ Private Sector (Foreign Players)
  - National Marine Dredging Company
  - Van Oord
  - Jan De Nul Group
- ❖ Other Players

I would like to purchase the “**Dredging in India 2018**” report:

Format (PDF)	Price
Site Licence (Single Location)	Rs 60,000
GST @ 18%	Rs 10,800
<b>Total</b>	<input type="checkbox"/> <b>Rs 70,800</b>
Enterprise Licence (Multiple Locations)	Rs 90,000
GST @ 18%	Rs 16,200
<b>Total</b>	<input type="checkbox"/> <b>Rs 106,200</b>

I am enclosing a cheque/demand draft for Rs \_\_\_\_\_, vide cheque/demand draft no. \_\_\_\_\_ drawn on \_\_\_\_\_ dated \_\_\_\_\_ in favour of “**India Infrastructure Publishing Pvt. Ltd.**”

Signature

Name (Block Letters) \_\_\_\_\_

Designation \_\_\_\_\_

Company \_\_\_\_\_

Company GST No. \_\_\_\_\_

Mailing Address \_\_\_\_\_

Telephone \_\_\_\_\_ Mobile \_\_\_\_\_

E-mail \_\_\_\_\_

**Wire transfer details:**

**Beneficiary** : India Infrastructure Publishing Pvt. Ltd.  
**Bank Name** : The Hongkong and Shanghai Banking Corporation Ltd  
**Bank Address** : R-47, Greater Kailash-1, New Delhi - 110048  
**Account No.** : 094179587002  
**Swift Code** : HSBCINBB  
**IFSC Code** : HSBC0110006  
**GSTIN** : 07AAACI5880R1ZV

**Contact details:**

**Priya Sen**  
 Information Products  
 India Infrastructure Publishing Pvt. Ltd.  
 B-17, Qutab Institutional Area, New Delhi 110016, India  
 Tel: +91-11-4579 8613, 41034600, 41034601  
 Fax: +91-11-26531196  
 Mobile: +91-99 00 644 996  
 Email: priya.sen@indiainfrastructure.com