

CONTAINER MARKET IN INDIA 2019

Segment Analysis, Emerging Trends, New Opportunities and Outlook

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The evolving trade dynamics and commodity mix have fuelled growth in the container segment. The current modal mix for cargo transportation (including containers) is skewed towards roads, which accounts for about 60-65% of the total freight transported. Growth in international trade, particularly containerised commodities such as textile, automobile, auto components, engineering and capital goods is driving the demand for containerisation. Initiatives such as the introduction of the GST regime, relaxation of the 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 across the country. The increased container demand, in turn, is driving demand for one-stop solutions with specialised infrastructure such as ICDS, CFSSs, warehouses, multi-modal logistics parks (MMLPs) and free trade warehousing zones (FTWZs). In light of the increasing container demand and the high costs associated with road transport, there is growing emphasis on promoting the more cost effective modes of transport such as railways, coastal shipping and inland waterways. In future, programmes such as the dedicated freight corridors and the Jal Marg Vikas Project will support this transition and evolution of the inter-modal mix.

Executive Summary

SECTION I: MARKET TRENDS, DEVELOPMENTS AND OUTLOOK

1. **Indian Container Market Overview**
 - ❖ Macroeconomic Scenario
 - ❖ Trade Scenario
 - ❖ Level of Containerisation
 - ❖ Recent Developments
 - ❖ Emerging Trends
 - ❖ Key Issues and Challenges
 - ❖ Outlook and Projections (2019-20 to 2023-24)
2. **Inter-Modal Analysis: Roads, Railways, Coastal Shipping and Inland Waterways**
 - ❖ Current Share
 - ❖ Comparative Cost Estimates
 - ❖ Overall Traffic Trends
 - ❖ Government's Targets to Achieve an 'Optimal Modal Mix'
3. **Container Traffic and Capacity Analysis**
 - ❖ By Mode of Container Movement
 - ❖ By Region
 - ❖ By Origin and Destination
 - ❖ By Type of Containerised Commodity
4. **Expected Impact of Dedicated Freight Corridor**
 - ❖ Scope and Key Features
 - ❖ Current Status
 - ❖ Expected Timelines
 - ❖ Introduction of Double Stack Containers: Impact and Benefits
 - ❖ Overall Impact on Container Movements
 - ❖ Other Upcoming DFCs
5. **Market Opportunities, Outlook and Projections (2019-20 to 2023-24)**
 - ❖ Demand Drivers
 - ❖ Policy and Regulatory Outlook
 - ❖ Investment Projections
 - ❖ Traffic Projections by Mode of Transportation (road, rail, coastal shipping and inland waterways)
 - ❖ Capacity/Network Addition Projections
 - ❖ Projected Freight Rates
 - ❖ Key Upcoming Projects
 - ❖ Big-ticket Opportunities: 2019-20 and Beyond
6. **Costs and Tariff Trends**
 - ❖ Analysis of Operating Costs
 - ❖ Pricing Trends
 - Road Freight Rates
 - Handling Charges at Ports
 - Haulage Charges
 - Storage Charges
 - ❖ Key Projections

7. Investment Scenario

- ❖ The Experience So Far
- ❖ Recent Deals and Transactions (Private Equity, M&As and IPOs)
- ❖ Key Successful Exits
- ❖ Historical Rates of Return
- ❖ Upcoming Opportunities for Investors
- ❖ Expected Returns
- ❖ Investment Outlook

8. Key Government Initiatives and Policy Changes: Impact Analysis

- ❖ GST Regime
- ❖ E-way Bill
- ❖ National Logistics Policy & MMLP Policy
- ❖ Cabotage Law Relaxation
- ❖ Revised Tariff Guidelines for Private Terminal Operator
- ❖ Freight Any Kind (FAK) Tariff Regime for Rail Containers
- ❖ Relaxation of Coastal Movement of Exim Transshipment and Empty Containers
- ❖ Direct Port Delivery Scheme
- ❖ DMICDC Logistics Data Services
- ❖ Others

This chapter will analyse the impact of these initiatives and policy changes on container terminal operators, container train operators, road transporters, trucking industry, shipping companies, CFSSs, ICDS, etc.

9. Infrastructure Development under Other Key Programmes

- ❖ Sagarmala Programme
- ❖ Bharatmala Programme
- ❖ Jal Marg Vikas Project
- ❖ Delhi Mumbai Industrial Corridor
- ❖ Others

This chapter will cover the overview, key features, container infrastructure capacity, current status, and upcoming opportunities under each of these programmes/projects.

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

10. Ports

- ❖ Traffic Trends
 - Major and Non-major Ports
 - Port-wise Analysis
 - Terminal-wise Analysis
 - East Coast versus West Coast
 - Loaded versus Unloaded
 - Transshipment Traffic
 - Domestic vs Exim Traffic
- ❖ Container Handling Capacity
- ❖ Trends in Global Container Shipping
- ❖ Transshipment Scenario
- ❖ Vessel Traffic

- ❖ Average Vessel Size at Ports
- ❖ Efficiency Trends
- ❖ Upcoming Projects & Planned Capacity Addition
- ❖ Key Initiatives to Improve Hinterland Connectivity
- ❖ Key Issues and Challenges
- ❖ Outlook and Projections

11. Roads

- ❖ Size and Growth
- ❖ Existing Infrastructure
- ❖ Cost of Container Movement
- ❖ Connectivity to Container Handling Ports
- ❖ Trucking Industry Overview
- ❖ Market Structure and Key Players
- ❖ Issues and Challenges
- ❖ Outlook and Projections

12. Railways

- ❖ Share of Container in IR's Freight Traffic and Earnings
- ❖ Traffic Trends
 - Overall – IR's Container Traffic
 - Zone-wise
 - EXIM and Domestic
- ❖ Trends in Earnings
 - Overall – IR's Container Freight Earnings
 - Zone-wise
 - EXIM and Domestic
- ❖ Recent Developments/Initiatives
- ❖ Container Train Operators
 - Industry Structure
 - Current Infrastructure
- ❖ Upcoming Projects & Planned Capacity Addition
- ❖ Issues and Challenges
- ❖ Outlook and Projections

13. Coastal Shipping and Inland Waterways

- ❖ Size and Growth
- ❖ Existing Infrastructure: Container Handling
- ❖ Traffic Trends
 - Coastal Container Traffic
 - Container Movement on Inland Waterways
- ❖ Composition of Traffic
- ❖ Government Schemes and Initiatives
- ❖ Upcoming Projects
- ❖ Outlook and Projections

SECTION III: OTHER LOGISTICS INFRASTRUCTURE FOR CONTAINER MOVEMENT

Each of the following chapters will include:

- Segment Size and Growth
- Existing Capacity
- Policy Framework
- Government Schemes and Initiatives
- Major Players
- Upcoming Projects and Opportunities
- Future Outlook

14. Cold Storages & Reefer Containers

15. Container Freight Stations/Inland Container Depots

16. Logistics Parks & MMLPs

17. Free Trade Warehousing Zones

SECTION IV: KEY PROFILES

18. Key Port Container Terminals

- ❖ Adani CMA Mundra Terminal
- ❖ Adani Hazira Container Terminal
- ❖ Adani International Container Terminal
- ❖ Adani Mundra Container Terminal
- ❖ APM Terminals Mumbai
- ❖ APM Terminals Pipavav
- ❖ Bharat Mumbai Container Terminal
- ❖ Bharat Kolkata Container Terminal
- ❖ Chennai Container Terminal Limited
- ❖ Chennai International Terminals Private Limited
- ❖ Dakshin Bharat Gateway Terminal
- ❖ Haldia 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
- ❖ Netaji Subhas Dock Container Terminal
- ❖ New Mangalore Port Container Terminal
- ❖ Nhava Sheva International Container Terminal
- ❖ Nhava Sheva International Gateway Terminal
- ❖ PSA Sical Container Terminal
- ❖ Visakha Container Terminal
- ❖ Others

Each profile will cover information on throughput, current capacity and capacity utilisation, key facilities, draught levels, dwell time, equipment availability and planned expansion.

19. 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
- ❖ Inlogistics
- ❖ International Cargo Terminals and Rail Infrastructure Private Limited
- ❖ Kribhco Infrastructure Limited
- ❖ Pristine Logistics
- ❖ Sical Multimodal and Rail Transport Limited
- ❖ TransRail Logistics Limited
- ❖ Other Key CTOs

Each profile will cover information on company operations, existing infrastructure, network covered, financial performance, future plans, etc.

20. Key Road Transport Operators

- ❖ Transport Corporation of India Limited
- ❖ Allcargo Logistics
- ❖ Associated Road Carriers Limited
- ❖ Coastal Roadways
- ❖ Darcl Logistics
- ❖ DRC Logistics
- ❖ East West Freight Carriers Private Limited
- ❖ Gati KWE
- ❖ Patel Roadways
- ❖ Prakash Roadlines Private Limited
- ❖ TVS Southern Roadways Limited
- ❖ VRL Logistics Limited
- ❖ Others

Each profile will cover information on company operations, existing fleet, geographical coverage, financial performance, future plans, etc.

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Prithish Verma

Manager – Information Products
India Infrastructure Publishing Pvt. Ltd.
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Tel: +91 11 46012963, 41034600, 41034601
Mobile: +91 9910833878
Fax: +91 11 2653 1196
Email: prithish.verma@indiainfrastructure.com