New Research Report

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 though 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, CFSs, 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, programmess such as the dedicated freight corridors and the Jal Marg Vikas Project will support this transition and evolution of the inter-modal mix.

- 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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