

*All Indian Seminar - Development of Small & Medium Ports Across the coast,
for Harnessing the Logistics, Transport & Economy*

March 28th & 29th, 2019

Hyderabad, Telangana

Capacity Assessment and Opportunity Identification in Indian Ports Sector

Presented By -

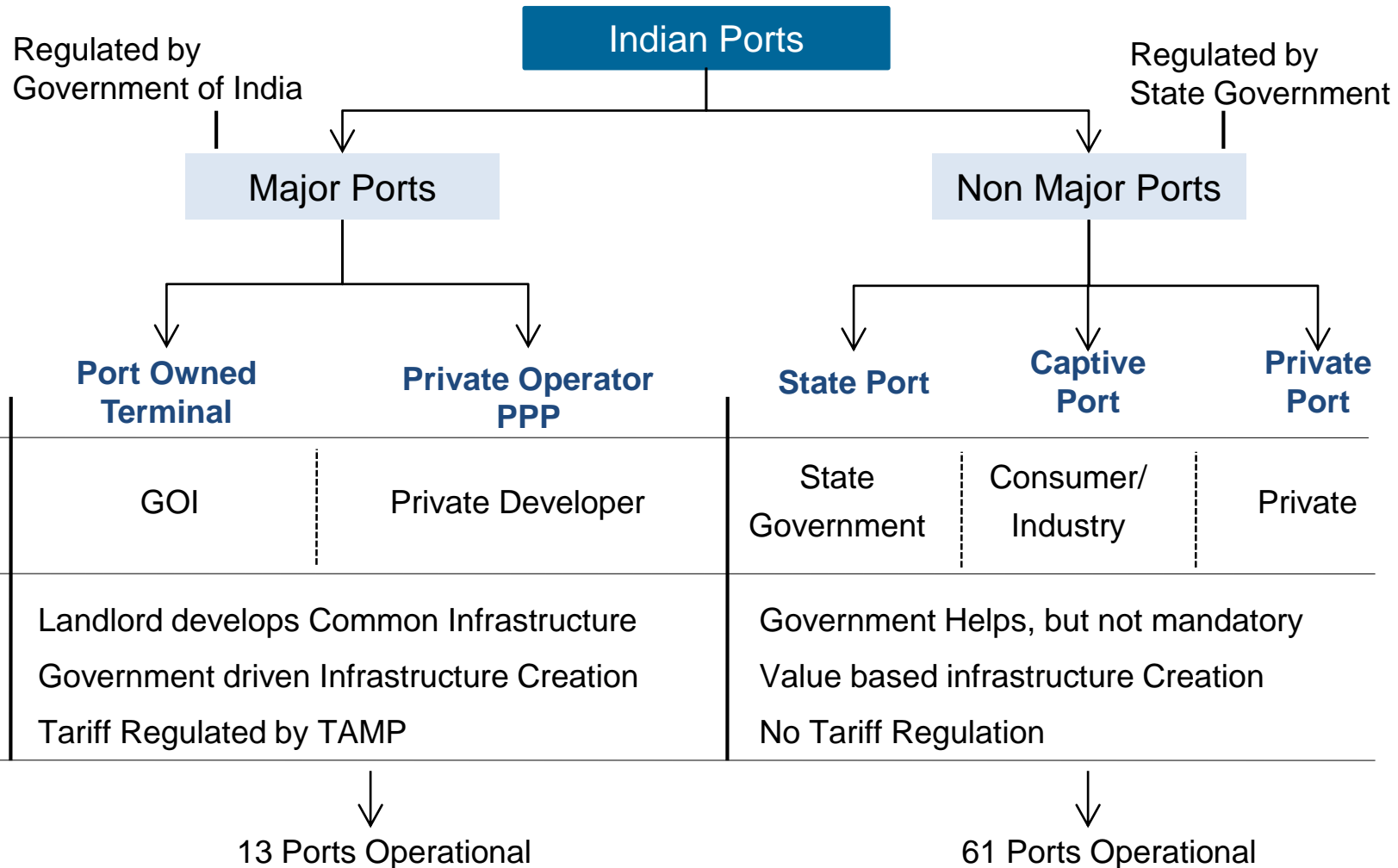
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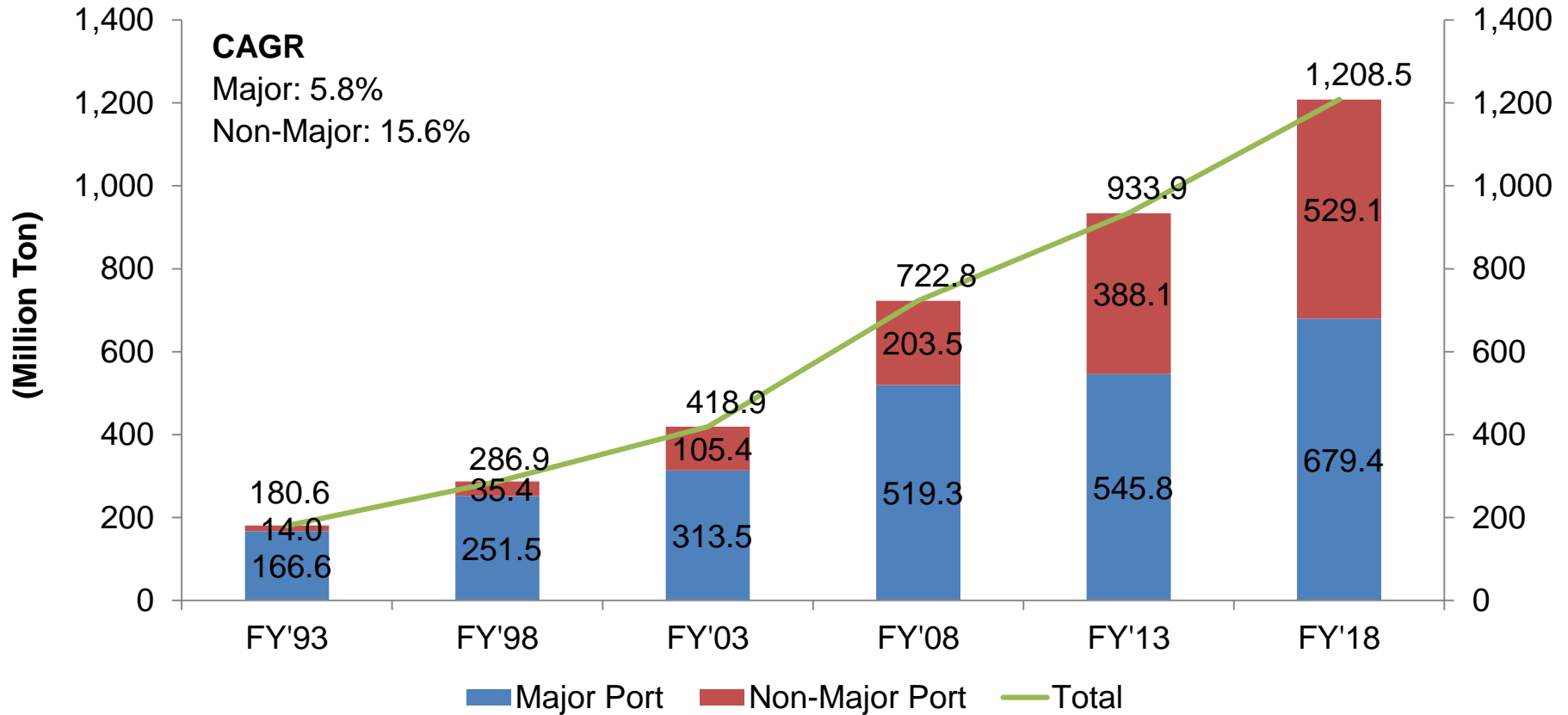


Overview of Indian Port Sector





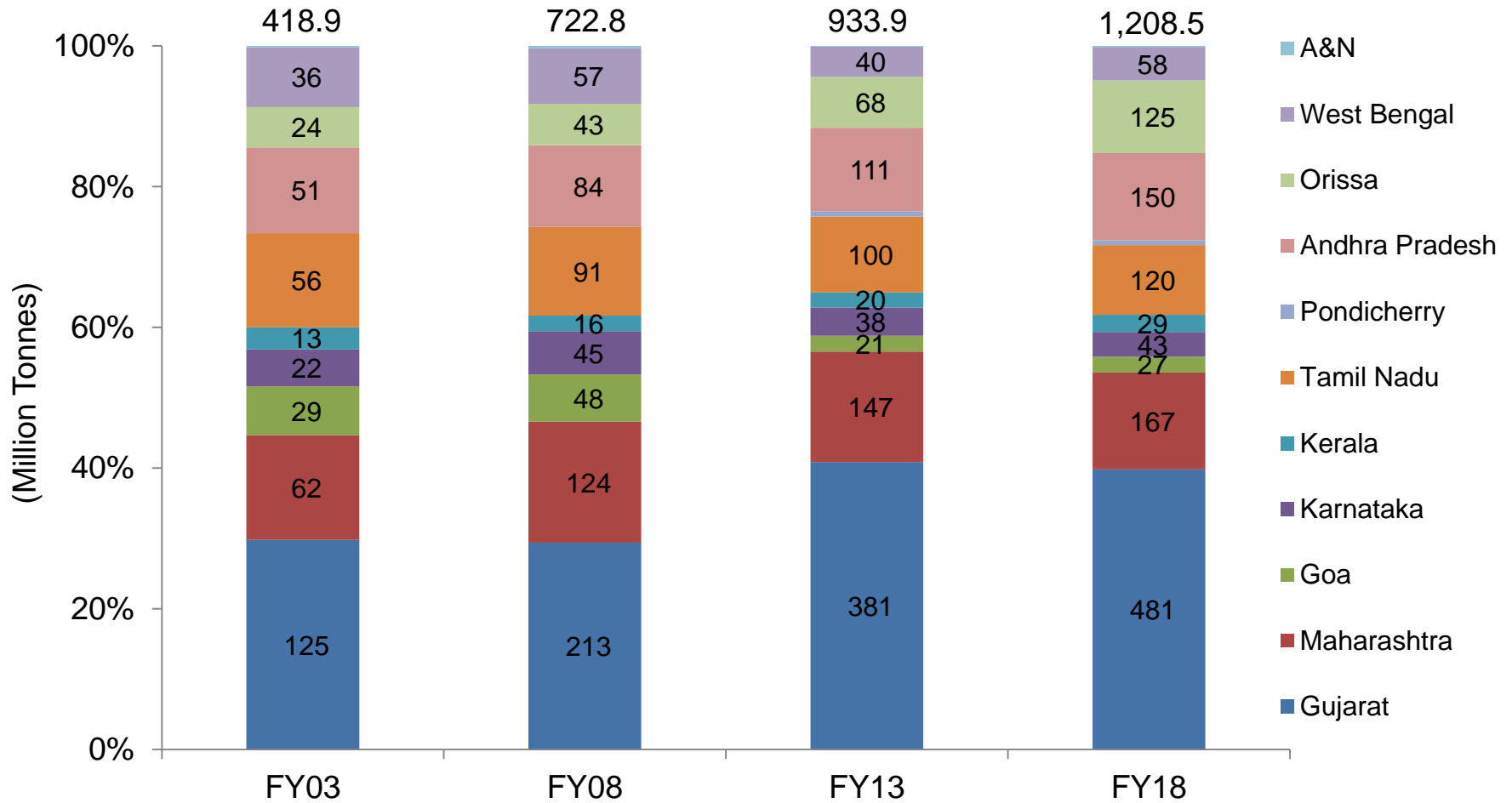
25 Years Ports' Performance



- India's Port Traffic grew over 6 times in the last 25 years
- Promoting private investments in Port Sector rewarded India with higher growth
- Contribution of Non-Major Ports increased from 8% to 44% in 25 years

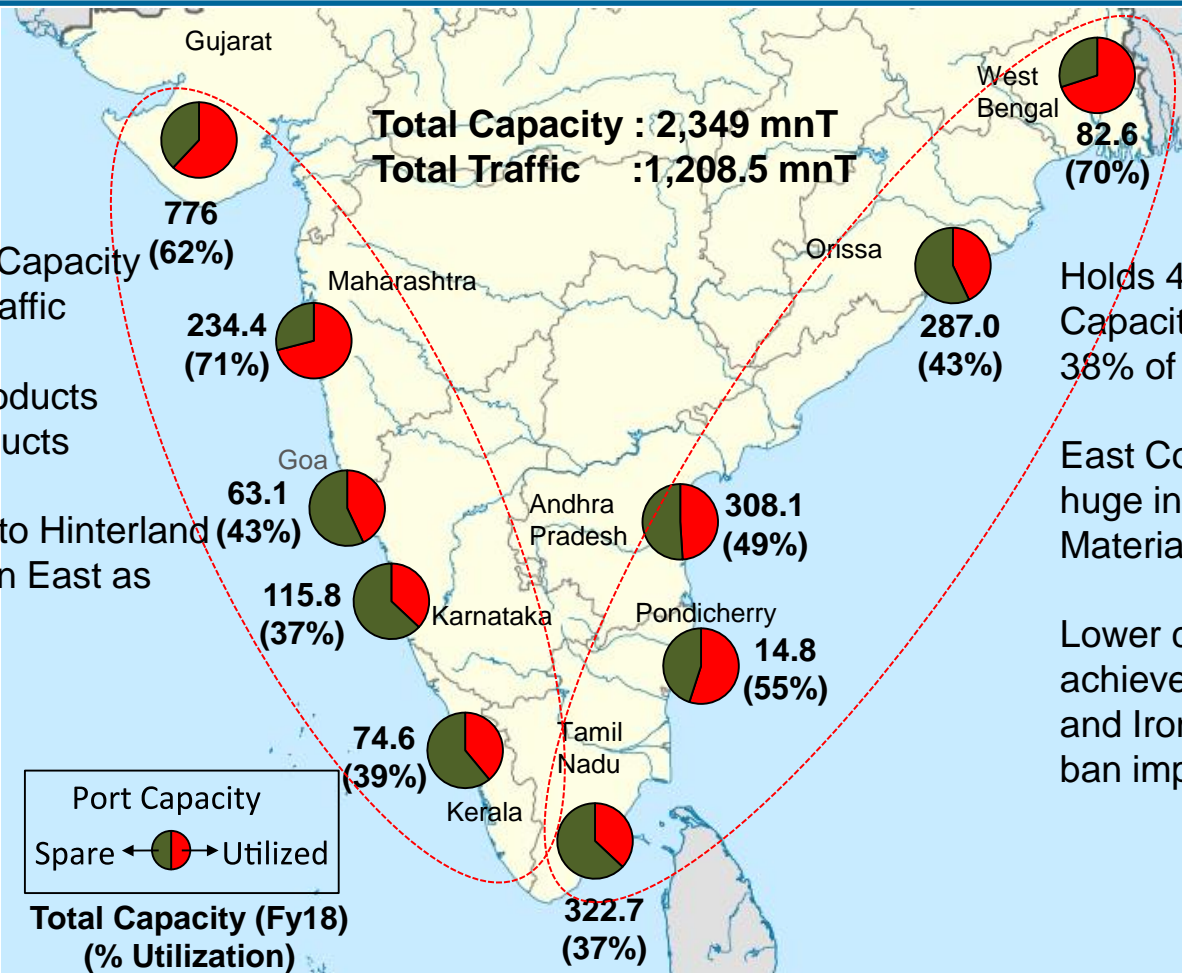


15 Years Region wise Traffic Assessment



Gujarat achieved highest share in ports traffic (40%), followed by Maharashtra (14%). Restriction on Iron Ore has negatively effected Traffic growth of Goa and Karnataka

Region wise Capacity Utilization



West Coast Ports

- Holds 55% of Total Capacity (62%)
- 62% of total ports traffic
- Focus on
 - Petroleum Products
 - Finished Products

- Better Connectivity to Hinterland (43%)
- Services Regions on East as Well

Holds 45% of total Capacity accommodating 38% of total ports traffic

East Coast contributes huge in Trade of Raw Material

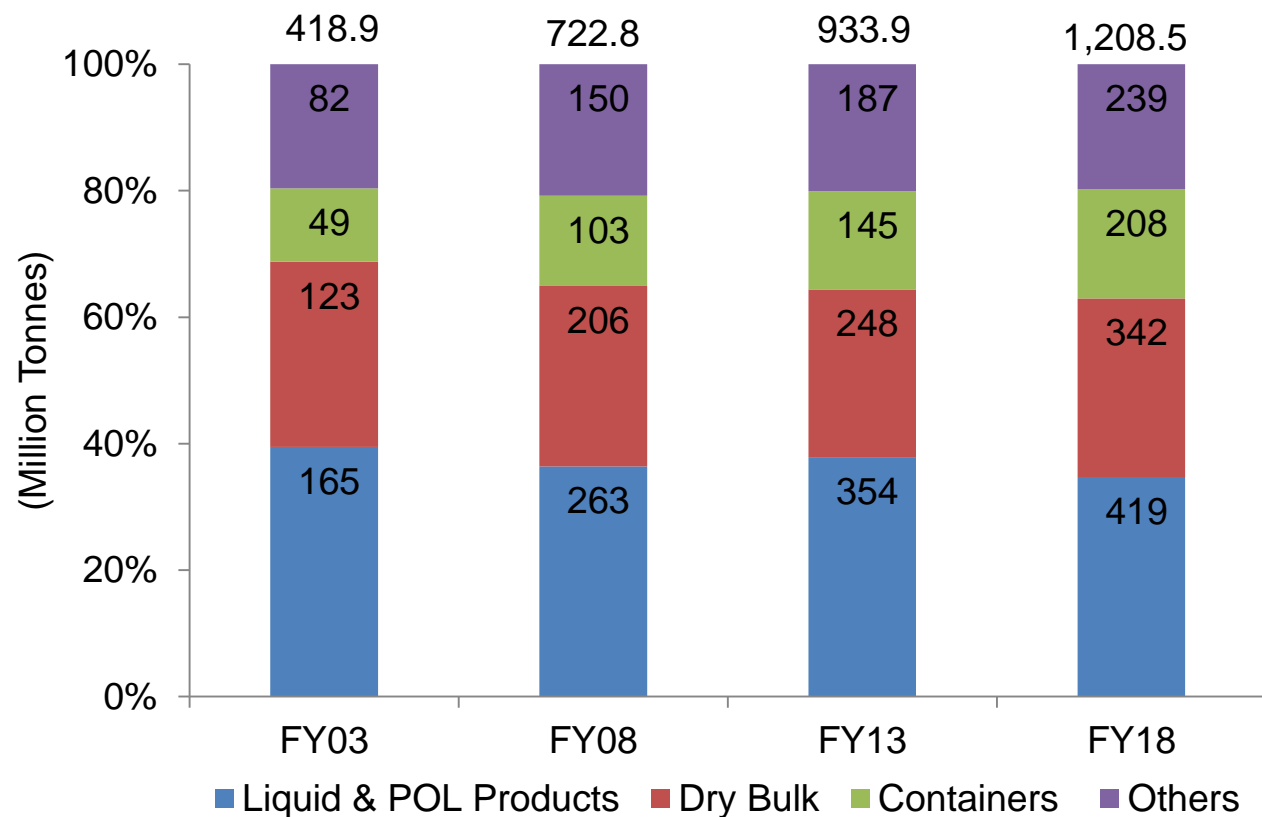
Lower capacity achievement - fall in Coal and Iron Traffic due to ban imposition

Better Infrastructure development on Ports on East Coast would improve logistics scenario and reduce dependency on west coast

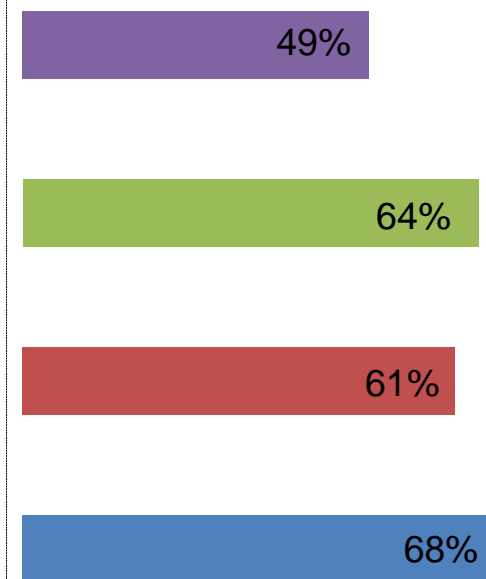
15 Years Commodity Assessment – Traffic & Capacity



Traffic Handled



Capacity Utilization (Fy17)



Growth in POL & Dry Bulk led to increase in demand for infrastructure, Same trend likely to continue in future. Other commodities require specific & customized facilities, this offers huge opportunity in future.



New Growth Area Possibilities

Commodity and Region wise need assessment of additional infrastructure till 2025

Description	Container	Bulk	Liquid	Minor Bulk	LPG	LNG
Gujarat	X	X	Has to be in consultation with Refineries	●	✓	X
Maharashtra	X	X		●	✓	X
Goa	X	X		X	X	X
Karnataka	X	X		X	X	X
Kerala	X	X		X	X	X
Tamil Nadu	X	X		X	X	✓
Pondicherry	X	X		X	X	X
Andhra Pradesh	X	X		X	X	✓
Orissa	●	●		X	✓	✓
West Bengal	●	●		●	✓	✓
Andaman Nicobar	●			●	X	X

Opportunity exists in logistics planning and construction of specific cargo handling facilities at under-utilized ports especially Non-Major Port. This is the immediate need in Indian Port sector.

Thank You for your Attention

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