

SAMLF SESSION - I

Come Together to Capitalise

SAMLF SESSION - II

Port Infra: Gearing up for Big Vessels

CI SESSION - I

Digitalisation Improves Customer Experience

CI SESSION - II

Future of Container Supply Chain

SOUTH ASIA WOMENS FORUM

Breaking the Glass Ceiling

South Asia's premier maritime business magazine

maritime gateway

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Shatrughan Sinha receives Lifetime Achievement Award



SAMLF 2017

SOUTH ASIA FORUM TAKES OFF!

For the first time the maritime community and stakeholders from nine South Asian nations came together to Mumbai to collectively explore the business opportunities and resolve the challenges



At the industry's most sought after and unparalleled **The Gateway Awards** presentation night achievers were honoured for their inspiring accomplishments. The most exciting moment came when legendary bollywood actor, Former Shipping Minister and Member of Parliament, **Shatrughan Sinha** walked onto the stage to receive Lifetime Achievement Award amidst standing ovation.



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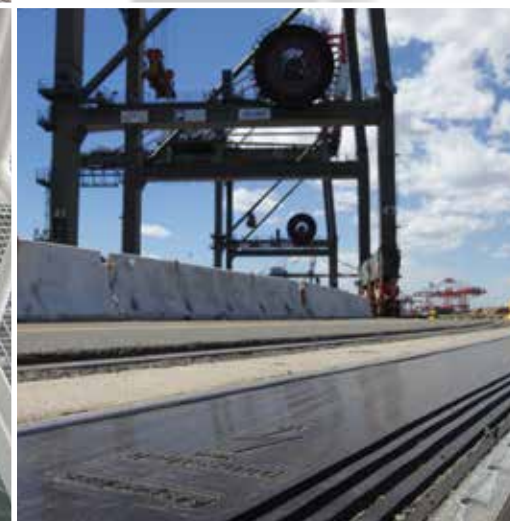


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Timely completion is critical

There is a joke doing the rounds in the industry circles and it goes like this: the last time the Japanese Premier Shinzo Abe was here in India, Indian Prime Minister Modi took him to Varanasi where travel and rituals took up four hours of the visiting guest. At the end of the function, Abe seemed to have quipped to his counterpart, people have so much time to spare, why do they need bullet train? In the wake of the announcement of the bullet train becoming a certainty, we ask the same question that do we need a bullet train connecting Mumbai and Ahmedabad at a cost of \$17 billion?

The reason, ostensibly, for this high speed rail is to ensure travel is easy for people moving between these cities for business. By this virtue, the dedicated freight corridor is no different from the passenger train. One facilitates business and the other carries goods facilitated by business. The two DFCs envisaged in the east and west - being funded by JICA - were hailed as key infrastructure projects to drive economic growth. The benefits of the freight corridors are too many to list here, but trains on the exclusive rail and road corridors will move at a speed of 100kmph once ready from a painful 25kmph now. This means the freight trains too will make it to Delhi in a day from Bombay.

For almost five years now these corridors have been postponed, revisited with routes being altered many a time.

Planned to be functional by 2018 originally, some say these projects might not see the light of day until 2022. Reason: Undue demands made by local civic and railway regional heads to acquire land and execute the project in stretches. The 4th terminal in JNPT would perhaps be unable to deliver on its potential fully because of the problems caused by the railways in clearing just 450 metres of a line. How then does government envisage that the high-speed rail project to be completed in the next five years?

These delays lead to cost escalation. DFCs are key to doing business easily in India. Their timely execution will ensure it becomes Modi government's legacy just like national highways became Vajpayee's government's. It will also play a lead role in transforming the railways from a loss making operation to an efficient and profitable venture. When Modi announced he would hasten the DFC projects, there was hope that freight operations were being treated at par with passenger train services. But with the latest announcement, the trade community will be left to lick its wounds again.

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“
DFCs timely execution
will ensure they
become Modi
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national highways
became Vajpayee's
government's.
”

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For the first time the maritime community and stakeholders from nine South Asian nations came together to Mumbai to collectively explore the business opportunities and resolve the challenges.

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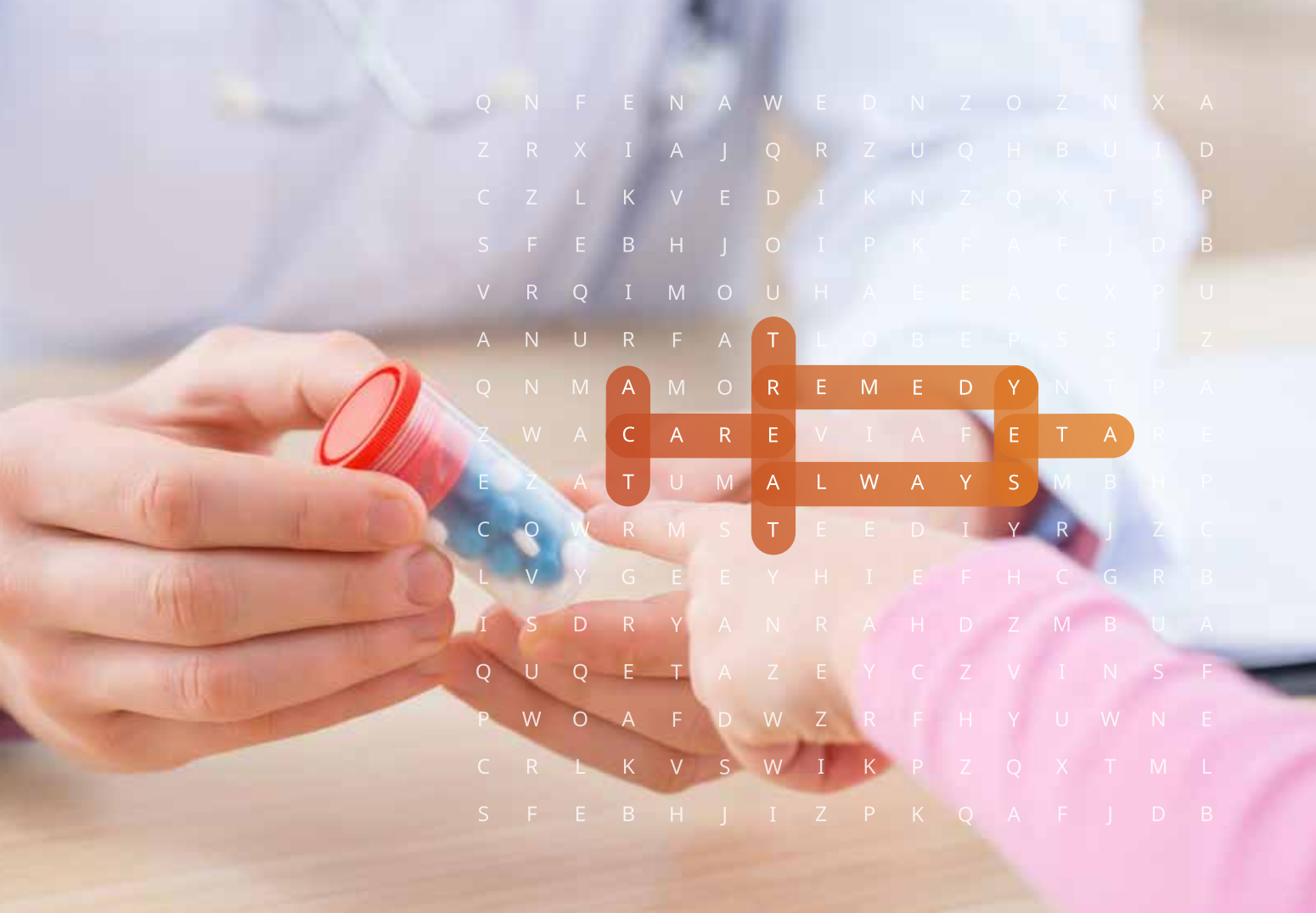
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SOUTH ASIA WOMENS FORUM
Breaking the Glass Ceiling
The session stressed upon increasing contribution of women in the growth of port and shipping sector

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South Africa's first shipping container mall



Property developer, Citiq, has come up with a South African first, a shopping centre made entirely of shipping

containers. The new 2 400m² shopping centre, known as "27 Boxes," will be developed in Melville, in the Faan Smit

Park between 3rd and 4th Avenue. The development will provide 78 shops and 200 underground parking bays. The retail shops will be small, with an average 14m² in space. The design of the shopping centre is planned to reflect the vibrant, trendy and bohemian character that has made Melville famous, transforming the suburb into a bespoke shopping centre, Citiq, CEO, Paul Lapham said. The cost of the development is about R12 million.

Thar Dry Port to expand operations

The Thar Dry Port plans to expand its operations as part of its strategy to develop a network of Inland Container Depots/ Container Freight Stations at key locations. It is initially coming up with new ICDs in Jaipur and Vadodara for which land acquisition is complete. Subsequently, three more facilities will come up in central, north and north-west India. Work on the Jaipur ICD will start in the next two quarters and will be completed in 18 months. Thereafter, the Vadodara ICD will be developed. Both will provide out-of-the-box solutions to create value for customers. There are plans to introduce cold storage facility, vault for precious metals, dedicated area for staging of cars, etc. to meet the growing demand for variety of cargo.

Maersk Line steps up digitalisation

Maersk Line is upping its digital play by making business transactions completely "paperless." The company is looking to cut costs in an industry hit by over-capacity and falling freight rates, forcing consolidation through alliances, mergers and acquisitions. "We have an aggressive plan on making the business more digital, globally. It will be rolled out over the next one-two years," Steve Felder, MD of the Danish giant's India, Sri Lanka, Bangladesh, Nepal, Bhutan and Maldives region revealed. Currently, 99 per cent of Maersk Line's bookings are done online, while 97 per cent of the shipping instructions are issued online.



New terminal to come up at Chittagong Port



The engineering corps of Bangladesh Army has been given the task to execute the project. Once completed, the terminal, having three 200-metre-long container jetties, would be able to handle around 4.50 lakh teu containers annually. The terminal will also have a specialised dolphin oil jetty for unloading oil, backward yards having capacity to store 4,500 teu containers, road and rail links and other facilities.

The foundation laying ceremony for Patenga Container Terminal in Chittagong's Patenga area was recently organised. The Tk 1,868 crore project would boost port activities significantly and will be built by the Chittagong Port Authority.

Visa Global Group and Navigators Logistics form joint venture

The new JV Company with Navigators Logistics and Visa Global Group marking its network will be called Navigators Visa Global Logistics Ltd (NVGL). It aims at tripling its growth and sales turnover in next 3 years using the Visa worldwide network and expertise while expanding into other neighbouring countries in Indian Subcontinent like Sri Lanka, Bangladesh and Nepal. Both the JV partners aim at complementing each other and help mutually increase their presence on the Europe-India and Australia-Indian trade lanes.

Kandla Port berth receives largest shipment

A baby Cape vessel, *MV MSC Carina* of 1,04,183 DWT, berthed at Kandla Port cargo jetty no. 8 to discharge 92,656 tonnes of coal. This was the largest single parcel of any cargo ever handled at Kandla Port. The vessel owners relied on Ben Line Agencies as their Protecting Agents for this port call, while OTA Kandla was the Charterer's nominated agent.

Maersk Line India appoints Steve Felder as Managing Director

Maersk Line has appointed Steve Felder as Managing Director (India, Sri Lanka, Bangladesh, Nepal, Bhutan and Maldives). Steve Felder will take over this role to add further momentum to the Maersk Line Asia growth trajectory. Prior to this appointment, Felder was the Managing Director – Eastern Africa for Maersk Line based in Nairobi, Kenya.



He has also served as Managing Director – Israel, based in Tel-Aviv, preceded by Africa Sales Director, based in Cape Town, South Africa. He also has extensive experience on the retail and banking sector.

Cochin Port Handles 20 per cent more traffic

Cochin Port handled 11.93 million tonnes of cargo for the period April to August 2017 compared to the corresponding period of last fiscal. International Container Transshipment Terminal, Vallarpadam handled highest ever monthly container volume of 50,842 teus in the month of August 2017. It has recorded a growth of 13.04 per cent for the period April to August 2017 compared to the corresponding period of 2016. On 18th August'17, the port received their first ever consignment of 27,500 tonnes of Sunflower Meal Extract in pellets.

Apeejay Shipping acquires Panamax

Apeejay Shipping Limited acquired a 74,107 MT DWT Gearless Panamax, Japanese build. The ship is renamed '*APJ UMA KISMAT*'. The acquisition takes its total fleet capacity to 4, 41,416 MT DWT with an average fleet age of 12.5 years. Apeejay Shipping has adopted an integrated management system comprising of ISO 9001, ISO 14001, OHSAS 18001 standards for Quality, Environment, Occupational Health & Safety and ISO 50001 standard for Energy management making it one of the select few Indian ship companies to do so.



India to buy more LNG

India has agreed to buy an extra one million tonne of LNG from Exxon Mobil's Gorgon project in Australia in a trade-off for cheaper rates for the originally-contracted volume. As per the deal, Petronet will take about another million tonne of LNG at 12.5 per cent of the Brent oil price. The original supplies will come for 13.9 per cent of Brent, down from 14.5 per cent earlier, and the transportation cost would shift on to Exxon from Petronet earlier.

Engineering exports target at the US

The USA is ranking as India's number one destination for engineering products with shipments aggregating \$2.9 billion between April and July period of the current fiscal. With shipments of \$1.78 billion, the UAE occupies the second slot among the top 25 destinations for the engineering exports during the first four months of the current financial year. Mexico is at the third position with India shipping as much as \$921 million to the Latin American market. India's engineering goods exports to the US have shown a cumulative growth of 37 per cent between April-July 2017.

Qatar announces 13 new shipping lines

Qatar Ports Management Company will announce 13 new shipping lines, including five lines in the coming days and eight on 15th October, the country's minister of transport announced. The Gulf state had setup alternative shipping lines as soon as the blockade began against it in early June. This includes routes through Oman with direct links to India, Pakistan, Turkey and Iran. Hamad Port currently caters for 27 per cent of regional trade and aims to increase to 35 per cent by 2019.

Ashish Pednekar takes over as Chairman, FFFAI



Ashish Pednekar has taken over as Chairman, FFFAI for 2017-19. He has been Chairman-elect of the Federation for 2015-17. Pednekar's installation ceremony was held at a grand evening function on September 22 in Mumbai preceded by the AGM of FFFAI.

Earlier, at the AGM AV Vijaykumar has been elected as new Chairman-elect and PS Atree, Rajesh Verma, S Ramakrishna, Shashidhar V. Hebbar, Sudip Dey and Kartik Pancholi have been elected as Vice Chairmen for the 2017-19 tenure. In addition, Amit Kamat and Vinod Sharma have been re-elected for the Honorary Secretary and Honorary Treasurer posts respectively.

Balmer Lawrie to commission Vizag logistic hub

Balmer Lawrie expects to commission its multi-modal logistic hub at Vizag in partnership with Visakhapatnam Port Trust in the January-March quarter of the current fiscal. Facilities will be created for handling Exim and domestic cargo. The company's temperature controlled warehouse at Patalganga near Taloja in Navi Mumbai was expected to be ready for commercial operation by end of this fiscal. The company is looking to invest ₹150-200 crore primarily in the logistics and industrial packaging businesses over the next two years.

“If you invest in infrastructure in a country with wide infrastructure gap (Nepal), you will get a good return on investment. Also, economic growth triggered by infrastructural development will provide additional benefits to investors.”

– **Suresh Prabhu**
Union Minister for Commerce & Industry



“Many pharma companies are opting containers for moving their freight instead of open trucks as the former can be used in all weathers. Also, with GST, many businesses houses are redrawing their supply chain models with timely delivery as the focus.”

– **Rubal Jain**
Managing Director, Safexpress



“Global corporations must be given the allowance of repatriating the revenue to their fiscal bases through double tax treaties. The port charges have to be brought down to make the prices competitive.”

– **David Dingle**
CEO, Carnival



“Since temperature controlled logistics industry stands on a low base of investment, there is ample scope for growth here starting from warehousing to value-added services. Private equity funds are now coming into the industry with a longer, 7-10 year horizon.”

– **Gopal R**
Global Vice-President, Supply Chain and Logistics Transformation Practice, Frost & Sullivan.



“We are very much in favour of free market. We want our customers and ourselves to be able to negotiate prices based on our own buying power and merits. Lesser regulation on pricing, the better.”

– **Steve Felder**
MD for Sri Lanka, Bangladesh, Nepal, Bhutan and Maldives region, Maersk





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Transnet National Ports Authority



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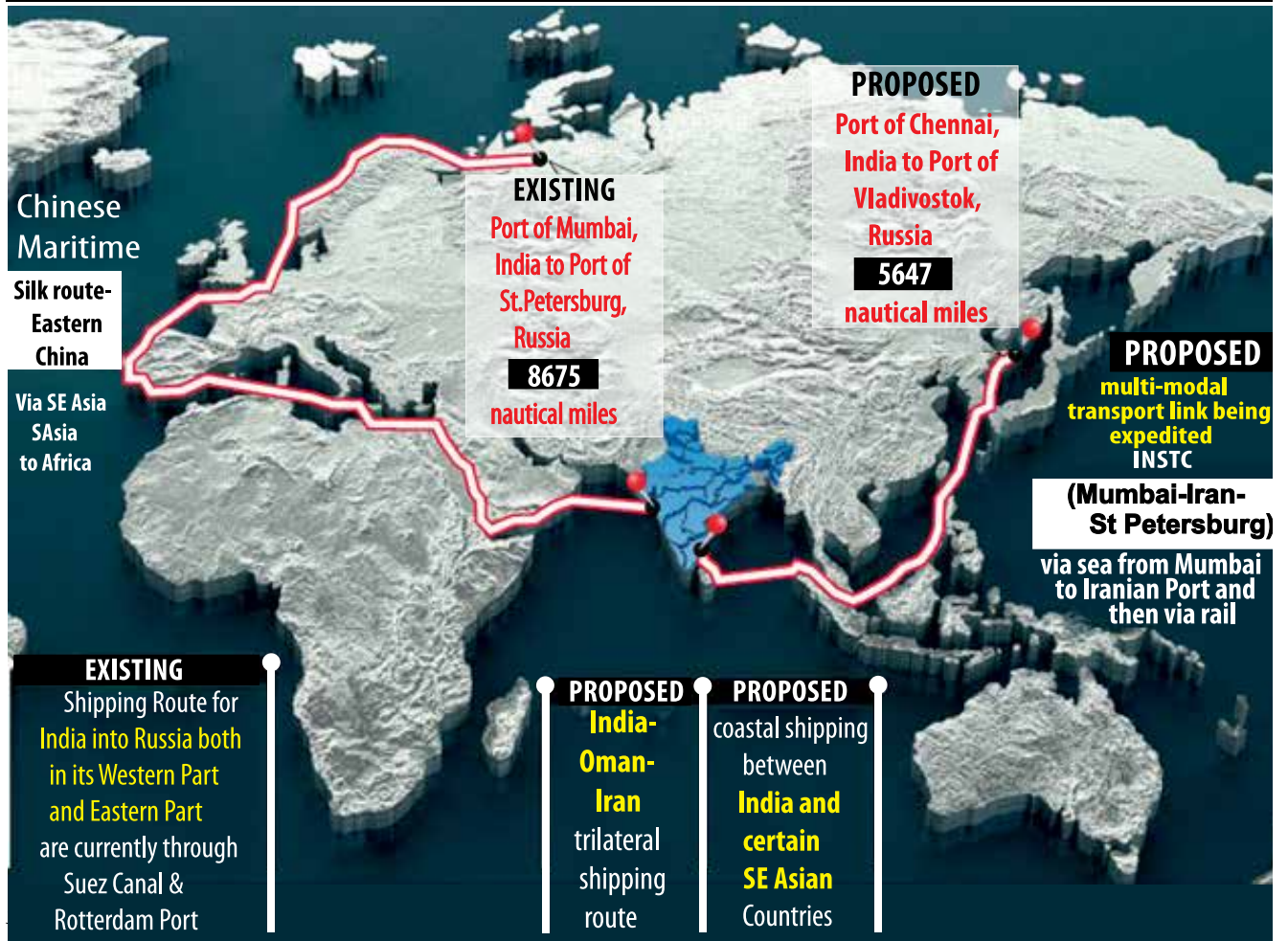
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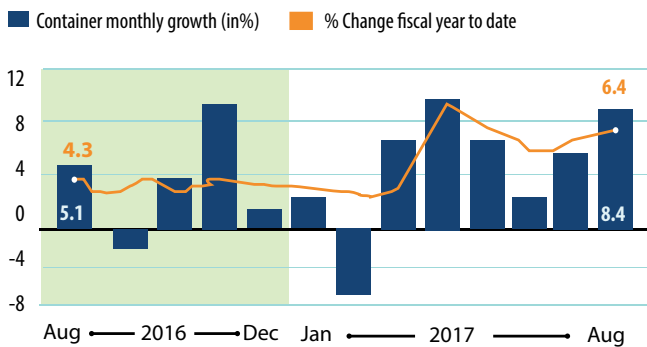
GLOBAL OFFICES: USA, MIDDLE EAST & AFRICA

CHENNAI TO VLADIVOSTOK, RUSSIA SEA ROUTE



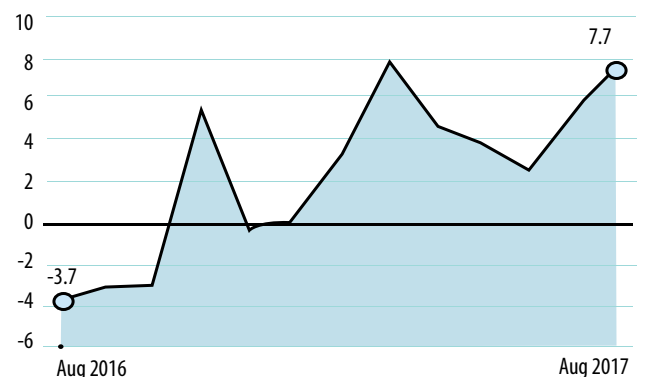
CONTAINER VOLUMES REBOUND

Total container volume at major ports increased 8.5% in August, significantly better than the earlier two months



Source Phillip capital (India) Pvt. Ltd; Container traffic growth of twenty-foot equivalent units

FREIGHT TRAFFIC AT INDIAN RAILWAYS EXPANDED 7.7% IN AUGUST, THE FASTEST GROWTH SO FAR THIS FISCAL



Source Indian Railways; Traffic in Tonnes Originating

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PORTS

Sanghi Cements to set up floating terminal at Cochin Port



Gujarat-based Sanghi Cements is setting up a floating cement terminal at Cochin Port as part of expanding its coastal movements to South Indian markets. The floating terminal is a ship with a bagging plant on board. It will have facilities to mix the raw material in the vessel itself and to take powdered cement in bags after the process. Floating terminal will save the costs of setting up shore-based facilities. It will ensure an additional three lakh tonnes volumes in the total cement throughput of Kochi Port. The port is in a position to provide berthing facility for the project, as its cargo handling capacity now stands at 25.01 MTPA against the rated berth capacity of 74.6 MTPA, AV Ramana, Deputy Chairman of the port said.

IMC Ltd to develop liquid cargo jetty at Haldia Dock Complex

IMC Ltd has been given the Letter of Award for developing a liquid cargo handling jetty, along with associated facilities, at Shalukkhali, Haldia Dock-II, Haldia Dock Complex

of Kolkata Port Trust. The project is on Design, Build, Finance, Operate and Transfer basis for a concession period of 30 years.

The proposed greenfield project, of about 2.5 million tonnes annual capacity, will be constructed on the west bank of the Hooghly river at Shalukkhali which is about 15 km north-east of the existing Haldia Dock Complex. IMC Ltd will invest about ₹172.52 crore for setting up this jetty, for handling liquid commodities like POL products, edible oils, paraxylene, LPG, etc. The project is scheduled for completion by 2020.

MSC connects Hamad Port with Indian gateways



Mediterranean Shipping Company (MSC) has announced new weekly calls at Hamad Port in Qatar, on its IMED service. This service will also enable exports from Hamad to Sohar in Oman, Mundra Port and Nhava Sheva in India, and the eastern Mediterranean ports. The extended IMED service will operate the following rotation, beginning with the departure of *MSC Sariska* from the Turkish port of Mersin on September 11, 2017: Mersin - Istanbul - Tekirdag - Canakkale - Piraeus - Iskenderun - King Abdullah Port - Salalah - Jebel Ali - Hamad. Calling directly at Hamad Port will

ensure faster transit times for cargo shipped from Turkish and Greek ports.

IGTPL sets monthly throughput record in August



The DP World-operated India Gateway Terminal Pvt Ltd (IGTPL) has set a new monthly container handling record, crossing the 50,000 teu mark for the first time in August 2017. Compared to August 2016, IGTPPL achieved a 16 per cent growth. Efficiency parameters at IGTPPL continued to be outstanding, with a Gross Crane Rate of 30+ moves per hour and truck turnaround time of 26 minutes, gate-to-gate which is in line with the best of international industry standards. In August, the terminal also successfully hosted more than thousand mainline vessels since its inception in 2011, connecting Cochin with crucial international ports across the globe.

Petronet LNG to develop LNG terminal in Sri Lanka

Sri Lanka has decided to go ahead with the setting up of an LNG terminal near Colombo with Indian and Japanese companies. Petronet LNG will soon

form a joint venture with Japanese and Sri Lankan companies to develop the LNG terminal which will provide regasified natural gas to various power plants, and domestic and transport sectors in Sri Lanka. The capacity of the terminal will be based on the demand for gas in Sri Lanka. The facility is expected to be developed in 2 years after completion of initial formalities. The terminal will be built on the western coast of Sri Lanka, in close vicinity of Colombo where most of the power projects (operating mainly on costly liquid fuel) are located.

Mormugao Port berth modernisation

The Goa Coastal Zone Management Authority (GCZMA) has directed the South West Port Ltd (SWPL) to revise Environmental Impact Assessment report for proposed enhancement of the capacity and modernisation of berth 5A-6A of Mormugao Port. As the demand for coal and other products is increasing at JSW steel plant in Vijayanagar, SWPL has proposed to deploy highly-mechanised and efficient environment-friendly material handling system at both the berths to increase the cargo-handling capacity to meet the demand. The implementation of the said project will lead to increase in port efficiency, better utilisation of existing resources and overall net reduction in pollution level due to retrofitting of material handling systems with latest dust entrapment systems and barriers.

KPCT deepens draft to 16 meters



Krishnapatnam Port Container Terminal (KPCT), in its quest to become the best port globally, has increased its draft for container terminal to 16 meters. KPCT now shares the honour of being one of the deepest draft container port on the east coast of India. Krishnapatnam Port already enjoys the status of having 18.5 meter draft, deepest in India for its bulk terminal. The port has started offering transshipment services with coastal operator Shreyas Shipping running feeder services between Krishnapatnam Port and Kolkata/Haldia port. There is a special coastal berthing facility at Krishnapatnam that has been made available for transshipment cargo and coastal transshipment vessels.

Cotton importers eye Kochi Port

The South India Mills Association and Indian Cotton Federation are looking to facilitate the import and re-export of containerised cotton through Kochi port. Kochi's proximity to spinning mills in Coimbatore, which is less than 200 km away, prompted them to seek a storage facility in the port for the transshipment of containers to facilitate local sales and cotton imports. Moreover, the reduced trans-

shipment time to Kochi, especially from West and East African ports and the US, would make the port an attractive destination.

A lot of imports are being made to South India every year, and a majority of the consignments are handled at Tuticorin Port. However, Kochi has a cost advantage to millers in Coimbatore, and the closing down of Walayar check post after GST has resulted in the faster movement of cotton to production units.

MOL to participate in LNG terminal in Gujarat



Mitsui O.S.K. Lines (MOL) signed an agreement with Swan LNG Pvt Ltd for the long-term operation/maintenance of a FSRU that will serve as the core receiving facilities in an LNG terminal to be developed by Swan Energy in Jafrabad, Gujarat. The FSRU will be owned by Swan Energy through its subsidiary, and MOL has the option to participate in its joint ownership. The option is exercisable any time before the delivery of the FSRU at shipyard. MOL will invest in Swan LNG and participate in many facets of the project as technical partner. The terminal, having LNG receiving capacity of 5 million tonnes a year, is slated to start operation in early 2020.

Direct shipping link between Chennai and Vladivostok

Aiming to put in place a key maritime route connecting India with Northeast Asia and Western Pacific region India is contemplating to put in place a major connectivity initiative — direct shipping link between Chennai and Vladivostok. With India making concrete moves to expand its presence in Far East Russia to harness natural resources, plans are in making for a maritime link connecting Chennai with the key Russian port on the Pacific. This shipping link would enable to transfer cargo between Chennai and Vladivostok in 24 days in comparison to over 40 days currently taken to transport goods from India to Far East Russia via Europe.

CMA CGM reports strong Q2, 2017



During Q2 2017, volumes carried grew by 33.3 per cent in comparison to Q2 2016, thanks to the integration of APL, the launch of OCEAN ALLIANCE and the industry dynamism. The increase in freight rates on most of the group's lines led to a significant 12.5 per cent increase in average revenues per container in the second quarter of 2017. The group's consolidated revenues hence strongly increased by +56.8 per cent in

comparison with Q2 2016, to reach \$5.55 billion. For the quarter the group has registered a consolidated net income group share of \$219 million.

Integrated Cargo Terminal at Imphal Airport

Airports Authority of India (AAI) will construct an integrated cargo terminal at Imphal Airport after obtaining grant-in-aid under Trade Infrastructure for Export Scheme (TIES) of Ministry of Commerce & Industry, Govt. of India. The Government of Manipur had planned to establish an Export Import Cargo Terminal (EICT) at Tulihal, Imphal Airport under ASIDE Scheme of the Ministry of Commerce & Industry.

The proposed cargo terminal will give a boost to the export of handicrafts and perishable cargo. The estimated cost of construction is ₹16.20 crores. Out of this, the Ministry of Commerce & Industry has sanctioned a grant of ₹12.96 crores under TIES. The balance amount to construct will be met out of internal sources of AAI.

Iran cuts rail freight tariffs

Iran Railways has reduced tariffs for cargo by 50 per cent in order to increase cargo to INSTC-Express Corridor from India to Russia. A 5-way MoU has been recently inked between Iran, Azerbaijan, Russia, Ukraine and Poland for transportation on the route. Dry runs conducted from Mumbai to Baku via Bandar Abbas and from Mumbai to Astrakhan via Bandar Abbas, Tehran and Bandar Anzali revealed that transport costs were reduced by \$2,500 per 15 tonnes of cargo.

SAMLf 2017

SOUTH ASIA FORUM TAKES OFF!



For the first time the maritime community and stakeholders from nine South Asian nations came together to Mumbai to collectively explore the business opportunities and resolve the challenges.

One Forum. One Voice. The South Asia Maritime and Logistics Forum and the Containers India conferences were what the industry just needed. Be it ease of doing business, better policies for maritime trade or a logistics regime that would streamline all the land side operations, the industry spoke in one voice advocating the change it needed for the region to grow. Amidst new reformative policies and unprecedented structural changes, container trade in India and the world has seen a year of survival as the drastic changes are making every firm rethink and re-draw its strategies. The SAMLf and Containers India presented to all the executives and industry persons new trends that were shaping the industry.

For the first time, about nine countries in South Asia came together to see how they can all work together as a region that is shaping up to be a driver of economic growth, trade and market expansion creating a massive opportunity. Maritime professionals from India, Sri Lanka, Bangladesh, Singapore and Nepal spoke of the expanding logistics sector and the related services that have caused disruption in the trade. The forum spoke of the many business prospects for the global transportation industry. It is expected that the Intra-Asia trade and South Asia's greater trade expansion with Africa will have sound growth over the next decade. In this backdrop of knowledge of increasing shipping and logistics capacities to connect people and businesses along with governments of South Asia, this was an organised platform.

The forum was ratified and endorsed by none other than the Shipping Minister, Nitin Gadkari who outlined the proj-

ects undertaken by various ports and improvements made on the land side infrastructure by deepening and strengthening road connectivity, establishing a separate firm to lay new rail lines and ensure faster movement of goods to and from the ports through the Sagarmala programme.

The forum that was the brainchild of Maritime Gateway and Colombo International Maritime Conference events was hugely successful in generating great interest among all the stakeholders to develop new maritime opportunities in India. The goal of the conference was to explore opportunities, find solutions for existing challenges and share best practices with each other. In doing this, the forum was hugely successful as the delegates returned with all this and much more.

The fifth edition of the Containers India conference provided the market intelligence to the Indian Container Industry on the changes to be dovetailed into operations to ensure the industry strides well in to the coming years.

The Containers India conference debated the most profound and critical issues facing the industry. The policy initiatives introduced by the Government were closely examined and many a leader came forward to how these decisions had a lasting impact on the industry. Container supply chain stakeholders also looked at the digitisation of the entire supply chain and the changes that are impacting the container trade. For the Indian Container trade, this was a forum that helped in collectively identifying issues to see how they can all work together in making India a place to do business with ease.

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Union Minister for Road Transport, Highways, Shipping **Sri Nitin Gadkari** addressing the South Asia Maritime and Logistics Forum

"WE ARE COMMITTED TO SOUTH ASIA REGION DEVELOPMENT"

Union Minister for Road Transport, Highways and Shipping, **Nitin Gadkari**, assured India's support to all the neighbouring countries in building infrastructure and bringing down logistics cost

In his inaugural address through video message at the launch of first edition of South Asia Maritime & Logistics Forum (SAMLf) in India, Minister of Road Transport & Highways and Shipping, Govt. of India, Nitin Gadkari appreciated the initiative to create a forum for maritime nations in South Asia, and said, "Prime Minister Narendra Modi has decided to give highest priority towards development of Ports and inland waterways. It is a great pleasure and pride for me for the last 3 years that all major ports in India are making profit. While the ambitious Sagarmala initiative is giving emphasis on port-based industrialisation, connectivity and modernisation; the inland waterways projects are extended to neighbouring countries Nepal and Bangladesh which will be beneficial for the region's economy. The Indian government is keen to develop ports in Sri Lanka. Similarly, development of Chabahar Port will provide better connectivity to India and South Asia with Afghanistan, Uzbekistan, Russia and Europe. Nepal is a key partner for India and development of inland waterways will ease goods movement between the two countries. The biggest challenge for the region is to bring down logistics cost at par with other developed regions like Europe and China. I welcome all stakeholders from South Asia who are keen to invest in India, and together we can frame policy to facilitate investment."

The Indian shipping minister emphasised that India will stand by neighbouring countries in building infrastructure and bringing down logistics cost.



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Come together to capitalise

Inaugural session underlined the significance of South Asia in the global maritime trade and also emphasized upon the infrastructure challenges that could be overcome in the mutual interest of all partners through collaboration



(L to R) **Matías Herrera Dappe**, Senior Economist, World Bank Group; **H.E M Riaz Hamidullah**, High Commissioner, Bangladesh High Commission-Sri Lanka; **Shailesh Garg**, General Manager – Managing Director, Drewry Maritime Services Pvt Ltd; **Rohan Masakorala**, Senior Consultant, Ports & Aviation, SEMA President Office, Sri Lanka; **Romesh David**, Chief Executive Officer, South Asia Gateway Terminals (Pvt) Ltd.

With much fan fare **South Asia Maritime & Logistics Forum (SAMLf)** made its debut in Mumbai on September 7. The forum was initiated jointly by *Maritime Gateway* and *Colombo International Maritime Conference (CIMC)*, with support from **Ministry of Shipping, Govt of India** and **Ministry of Port & Shipping, Govt of Sri Lanka**. The forum is an effort to bring together stakeholders in South Asian maritime sector. The forum was well attended by 300 national and international delegates.



Welcoming the attendees, **Ramprasad, Publishers & Editor-in-Chief, Maritime Gateway** said it is time logistics service providers and countries

capitalise on each other's strengths as trade expands. Ramprasad stressed on the need to come together to exchange best practices and engage closely in the areas of maritime skill development, investment and infrastructure development, and the Forum will play a pivotal role to help the cause.

Highlighting the positive trends in the region, Guest of Honour **V. Kalyana Rama, CMD, Container Corporation of India** said that India and South Asia are strategically located with regard to global trade and the FTAs signed among the countries in the region is helping trade growth but to attain true potential it is essential that linkages by rail, road and the maritime route are further strengthened. He said India due to its geography has a greater role to play as the bridge linking South and South East Asia. Multi-modal logistics has also helped the trade by offering a mix of marine and surface logistics benefitting landlocked countries like Nepal and also intra-regional trade.

Matías Herrera Dappe, Senior Economist, World Bank Group elaborated that a 0.1 unit increase in efficiency can bring down logistics cost by 2.3 per cent and boost exports by 1.8 per cent. Hence, Ports in the region need to stay focussed on performance and efficiency.



Guest of Honour at the Forum, **H.E. Riaz Hamidullah, High Commissioner of Bangladesh to Sri Lanka**, emphasized upon policy, regional economic co-operation and strategic collaboration among nations to boost trade. He said apart from cargo, there is also potential for cruise service between countries in the Bay of Bengal. Hamidullah called the members of the shipping community to look beyond the port and shipping sector for innovation and form partnerships with others like cargo owners to create the required synergy.

Shailesh Garg, Director – General Manager, Drewry Maritime Services, sharing his observation said consolidation in the shipping industry has contributed in terms of reducing bargaining power of terminal operators, higher market risks, and pressure on port pricing. He also shared his thoughts on the trade in the region, container transshipment, challenges and opportunities.

The inaugural session also witnessed release of annual **Containers India Report** and also **South Asia Map**. At the closure of the inaugural session, all the speakers were felicitated with mementos presented by **Romesh David, CEO, South Asia Gateway Terminals**. Following the closure of the intuitive session, **Rohan Masakorala, Senior Consultant, Ports & Airports, SEMA President Office, Sri Lanka** extended vote of thanks. "I am happy to see the debut event take off well and now there is a forum for South Asia to bring people together, because earlier we were detached in spite of being in the same region. The video message from Shipping Minister Nitin Gadkari adds a lot of value and recognition to what we are doing. India being the largest and fastest growing economy of the region was the best place to host this event," remarked Rohan thanking one and all for their participation. 

Carriers Perspective

Consolidation will create new impetus

Evolution or rather revolution is taking place faster than expected in the port and shipping sector. The session picked up some ongoing and imminent issues that might completely change the landscape of the sector in the region.



(L to R) **Capt Vivek S Anand**, Director, NYK Line (India) Ltd; **Capt Dheeraj Bhatia**, Managing Director, Hapag-Lloyd India Pvt Ltd; **Michael Pinto**, IAS (Retd), Former Secretary, Ministry of Shipping- Moderator; **Michael Julian Bevis**, Senior Director Group Relations, South Asia, AP Moller-Maersk; **Capt Swaminathan Rajagopalan**, Commercial Director, CMA CGM Agencies India Pvt Ltd; **Tissa Wickramasinghe**, Chief Business Development Officer, Colombo International Container Terminal.

The first business session focused on the views of major shipping lines about developments taking place in shipping arena of South Asia seaborne cargo movement. Heavy weights from world's top shipping lines were part of the discussion panel and the mettle to oversee the proceedings was in the hands of Michael Pinto, IAS (Retd), Former Secretary, Ministry of Shipping, as moderator.


Over a period of time vessels' carrying capacity have grown tremendously, and it has effect on freight rate, shippers, and vessel operators as well as owners. Elaborating on the matter, **Capt. Dheeraj Bhatia**, MD, Hapag-Lloyd India said that there are certain cost advantages for operators to have larger vessels, however it might not have a linear effect on the entire supply chain. The cost involved in handling a larger vessel can be high if there were not required cargo volume. Size of vessels calling at the ports on the West Coast

of India has increased from 5,000-6,000 teus to 8,000-10,000 teus, and the vessels calling Colombo Port are little bigger.

Capt Vivek S Anand, Director, **NYK Line India**, explaining the developments said that tighter environment laws had forced shipping lines to adopt bigger vessels. The industry would be moving back to the situation where 20 per cent of operators used to control 80 per cent of the trade. Hence, countries which couldn't have infrastructure in place to handle larger vessels would be in difficult situation.

Capt. Swaminathan Rajagopalan, Commercial Director, **CMA CGM Agencies India** said that in the past shipping lines have been affected by competition, addition of capacity and entry of multiple players. A similar kind of situation is being experienced in the port and terminal sector as well. Cost and efficiency would impact ports and their preparedness to handle larger vessels could also be a deciding factor.

The moderator raised concerns about return on investment on part of terminal and port operators, which needed to invest to accommodate larger vessels, upon which **Michael Julian Bevis**, Senior Director (Group Relations), South Asia AP Moller-Maersk, explained that South Asia or Indian ports should not be looked at in isolation as the dilemma has been there globally. Ports needed to have infrastructure in place to compete globally. As the discussion and debate was getting intense, **BK Mandal**, Former CMD, Shipping Corporation of India opined that though giant ships benefit from economies of scale but there should be rationality about cargo availability.

Consolidation in the shipping industry has initiated, and elaborating the impact, Capt. Anand said that consolidation at global level would take place and it would give impetus to hub and spoke model. Capt. Bhatia said consolidation is need of the hour for lines who have invested heavily and also for those who are financially in a difficult position. Capt. Rajagopalan underlined the fact that consolidation has started even in regional and feeder operator segment as the volume of cargo handled by feeder operators has also grown. Merger and acquisition might not be the key but consolidation in terms of operation of tonnage have already been initiated. They said the infrastructure outside the port also needed to be improved for seamless cargo evacuation. On the matter of rising container freight rates, Bevis stressed that the regulator and policy makers should allow market forces to operate freely to ensure a level playing field as a free and competitive market principle would benefit the consumer. 

Port infrastructure: Gearing up for big vessels

By 2025, trade in ASEAN will grow to \$200 billion and the ports need to gear up accordingly to ensure efficient movement of cargo among countries in the Bay of Bengal

Port and terminals operators from India, Bangladesh and Sri Lanka came together to deliberate on improving capacity utilisation of ports, locating the cargo and fostering holistic development in the industry.

On the outset, **Vinita Venkatesh, Director, Krishnapatnam Port Container Terminal** voiced the need to improve capacity utilisation on the east coast. The east coast has a capacity of 600 million teu while the current capacity utilisation is only 300 million teu. The need of the hour is to bring the port sector as a whole into perspective rather than talking individually about public and private ports, she said. Shippers need to identify the cargo centres and move the cargo through ports that are both cost and time efficient.

Taking the discussion forward on holistic development of ports, **Upul Jayatissa, Chief Manager, Marketing and Business Development, Sri Lanka Port Authority**, brought to the fore the developments at Colombo Port. The port has boosted its infrastructure to service 22,000 teu ships. Growing at the rate of six per cent it has recorded business of \$6 million this year. The port is further expanding capacity with the development of the East Container Terminal. "We need to look at the ports as industry irrespective of ownership and bring out the areas where public and private ports can collaborate," averred **Atul C Kulkarni, Advisor, Indian Ports Association**. The government needs to chalk out the areas where it can help private ports, such as by improving last mile connectivity. All decisions should be port centric and not public or private port related. Indian port developers should also identify



(L to R) **Upul Jayatissa**, Chief Manager - Marketing & Business Development, Sri Lanka Port Authority; **Mike Formoso**, Managing Director, PSA International Pte Ltd India; **Tissa Wickramasinghe**, Chief Business Development Officer, Colombo International Container Terminals Ltd; **Vinita Venkatesh**, Director, Krishnapatnam Port Container Terminal; **Romesh David**, Chief Executive Officer, South Asia Gateway Terminals (Pvt) Ltd; **Atul C Kulkarni**, Advisor, Indian Ports Association; **Ahamedul Karim Chowdhury**, Terminal Manager, Chittagong Port Authority; **S N Srikanth**, Founder & Sr Partner, Hauer Associates Maritime & Port Consultants


opportunities abroad such as the Kaladan project.

Mike Formoso, Managing Director, PSA International Pvt Ltd India, referred to growing size of vessels that is putting pressure on port infrastructure. Coping up with this trend, Bharat Mumbai Container Terminal (BMCT) will increase its capacity from 1 million to 4.8 million teu by 2022. It has 1km continuous berth and all cranes are 22 rows wide. He gave a clarion call for deregulation of tariffs, creation of level playing field and abolition of TAMP.

The session moderator, **SN Srikanth, Founder & Sr Partner, Hauer Associates Maritime & Port Consultants**, invited the views of **Romesh David, CEO, South Asia Gateway Terminal**, on whether Colombo can rely on India for transshipment if TAMP is abolished? To which Romesh replied, "Colombo will develop on the back of India's

growth and not lack of India's growth." The cargo will always choose the easiest and optimal route. By 2025, trade in ASEAN will grow to \$200 billion and the ports need to gear up accordingly.

Ahamedul Karim Chowdhury, Terminal Manager, Chittagong Port Authority, suggested for promoting direct container trade with east coast of India. Indian NVOCCs carrying empties from Pangaon to Kolkata is increasing the cost for shippers. Freight rate rationalisation by mainlines is required.

Tissa Wickramasinghe, Chief Business Development Officer, Colombo International Container Terminal, announced that his port is getting ready to service ultra large carriers. The port development was completed in 28 months and in the first year it recorded business of more than 1 million teu, most of which came from India. 

Best practices

Fuel quality issues are here to stay



Capt. Rahul Choudhuri, MD – AMEA, Veritas Petroleum Services


As the trade grows in South Asia there is also an increased focus on providing bunkering services and this also brings into focus the quality of fuel as the industry at the global level is conscious about reducing emissions of ships that move about 90 per cent of the global exim cargo. Bringing to the fore global bunkering trends and their impact on the best practices to be implemented in the shipping industry, **Capt. Rahul Choudhuri, MD – AMEA, Veritas Petroleum Services** discussed about the fuel quality issues and fuel checking systems.

Going by the volumes, bunker volumes in India are five times less than China, seven times less than Korea and UAE and 25 times less than Singapore. Focusing on the hotspots of concentrated fuel quality defaults on global basis, Capt. Rahul underlined certain trends with distillate fuels such as the consistency with low flash point distillates, low viscosity distillates and high pour point distillates. Even heavy fuel oils are characterised by presence of high sediments, density and chemical contamination. So the conclusion is, “Fuel quality issues are here to stay, they are global in nature and we need to find a solution to it.” Surprisingly it is noted that fuel quality issues are less present in India and Sri Lanka compared to other parts of the globe.

To maintain quality of fuel Capt. Rahul highlighted the ISO8217-2017 quality standards that are recently launched and the industry should start following these standards, upgrading from the ISO8217-2015 standards that are currently in use. Moving to fuel system check, he said that 15 per cent of the global fuel oil exceed the quality specifications in terms of Aluminium and Silicon levels. Even the efficiency of fuel purifiers used is not up to the mark. Fuel purifiers currently in use are 57 per cent efficient while they need to be 85 per cent efficient.

Singapore has adapted mass flow metering to stop illegal fuel practices and improve fuel efficiency.

Verification of the quantity of fuel is also essential as 0.5 per cent deviation in fuel quantity causes an average loss of \$20,000 for a ship on an annual basis. Towards the conclusion Capt. Rahul highlighted five issues to be watched for:


- Fuel quality knows no location
- Watch out for distillate quality
- Fuel system check programme needs to be improved
- Mass fuel flow meter needs to be checked
- Watch for chemical contamination. 

A reliable logistics partner



Raj Khalid, India Representative, Port of Antwerp

“Everything flows from the way we look at ourselves,” said **Raj Khalid, India Representative, Port of Antwerp**, as he shared the vision of his port – to be a reliable link that is both cost effective and smooth in the shipping chain. The Port of Antwerp has recently taken over the role of an active landlord port where cargo handling is done by the private sector, while the port authority manages the infrastructure. The port contributes about 5.6 per cent to the GDP of Belgium while generating employment to about 70,000 people.

The concession policy of the port focuses on the investment being made, employment generated and the impact on cargo while awarding concession to private parties. Antwerp is Europe's most central seaport. Sea-going vessels can transport goods 80 kilometres inland, into the heart of Europe. This means transport via the Port of Antwerp to European customers and factories is not only quick and cheap, it is also very ecological. It means less road transport, which is an important consideration for many manufacturers. Towards the conclusion Raj highlighted the merits of his port – zero waiting time, zero accidents and zero debt. 

Speed and efficiency is the key

Digitisation has to replace tedious documentation and bureaucratic procedures and the industry should collaborate to bring logistics cost down

The session on logistics discussed the major factors affecting movement of goods in the South Asian region. Tracing the origin of the word logistics, **Sean Van Dort**, Director, Global Shippers Forum, the moderator spoke of how the French were responsible for the introduction of the concepts of VAT and GST. The panel discussion that included several representatives from multi-national logistics organisations veered towards what it would take for firms to provide world class logistics services. With the world of value added services expanding the boundaries of products a logistics firm can offer, **Vincent Lee**, Business Development Director, STENN International Singapore, said, "Service providers should not restrict themselves on the spectrum of services they can offer. Newer models are disrupting the market with their services leading to cheaper rates and better services."

While the panel agreed on the aforementioned argument in toto, the role of governments and regulations in smoothing trade for the region was a bone of contention. **Rajan Sharma** from Nepal Freight Forwarders Association reckoned lengthy foreign currency regulations were an impediment to trade. "Freight forwarder do the de-consolidation. Is there a way to de-regularise these laws," he asked. In a globalised world that is rapidly progressing with the help of technology, the panel members saw a need for companies across the region to digitise their operations to avoid tedious documentation processes. The need to rid the trade of unnecessary bureaucratic procedures was loudly echoed by the panel. **Amal Rodrigo**, Director, Hayleys Free Zone Limited said, "We have benchmarked ourselves to offering services equivalent to those offered by Europe and the USA but we are shy of handling bureaucracy and unfriendly policies well." To address the rising need for the logistics firms across the region to work together, **Jagath**




(L to R) **Jagath Pathirane**, Chairman, Sri Lanka Logistics & Freight Forwarders Association; **Rajan Sharma**, Former President, Nepal Freight Forwarders Association; **Amal Rodrigo**, Director, Hayleys Free Zone Limited; **Sean Van Dort**, Director, Global Shippers Forum; **Vincent Lee**, Business Development Director, STENN International Singapore; **Mahbubul Anam**, President, Bangladesh Freight Forwarders Association; **Rochana Jayawardana**, Director- Business Development & HR, CL Synergy

Pathiratne from the Sri Lankan Freight Forwarders Association suggested collaboration as an effective mode to move forward. "Whether it is liberalisation or cost effectiveness, we have to work to make things happen. Economies can no longer be protective afford to be protective," he said.

The major factors driving the development of logistics market are globalization, time-proportional economy, presence of virtual organizations, improved customer awareness, strategic concerns to achieve more flexibility and better IT infrastructure. Third-party logistics is a process or operation of sub-contracting industrial functions like cross-docking, inventory keeping, warehousing and transportation to a third party or supply chain management provider. Globalized product availability, demand for product individualization in terms of logistics, on-time delivery, just-in-time inventory, agility in time response transport, big data analytics and atomization of shipment are some of the global market trends guided by technological innovations like remote tracking and monitoring using RFID and EDI-based location of the shipment.

The market in Asia-Pacific region shows a steady and consistent growth

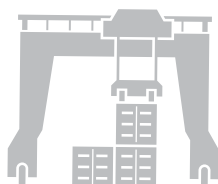
through service innovations by companies, so as to attract economic customers. The companies need to shift their focus from integrated services to offering broad range of products & services portfolio. With more focus on growing B2C sector, the scope for logistics outsourcing will extend towards value-added and specialized services., the experts said. There were several upsides that featured in the hour-long discussion. The fact that a logistician is making his way to many board rooms is an indication of the importance being given to logistics in companies is a point to take note of. The panel also mooted the point of creating a free zone like Dubai has for the trade's benefit. South Asia is expected to have grown by an impressive 6.7 per cent (y-o-y) as a whole over the last year, staying higher than the growth rate of East Asia, which stood at 6.3 per cent. Other regions around the world have either been growing slowly or contracting. In this light, the benefits of a free zone could be many.

The panel discussion concluded on an important point stating that way forward has two elements that would play a key role in forging collaborations. Speed is way. Efficiency is key. 

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Are government policies a facilitator or a drag?

The parliamentary debate was a first of its kind session introduced this year that saw three panelists each speak for and against a set motion. A vote by the audience on the motion was called for – before and after the speakers made their presentation



(L to R) **Vivek Kele**, President, AMTOI; **Rajeeva Sinha**, Former Whole-time Director Adani Ports & SEZ Ltd; **Deepak Shetty**, Former Director General of Shipping; **Michael Pinto**, Former Secretary, Ministry of Shipping; **Anil Devli**, Chief Executive Officer, INSA; **Anil Yendluri**, Director and Chief Executive Officer, Krishnapatnam Port Company Limited; **Prakash Tulsiani**, COO & Executive Director (Operations), Allcargo Logistics.

The Containers India event had a unique and unprecedented opening session this September. A Parliamentary Debate comprising of six speakers who argued for and against a motion. The motion that was set as a ruling was whether the Indian business laws and policies were hindering the growth of the shipping industry.

The six speakers were **Deepak Shetty**, Former Director General, Shipping; **Anil Devli**, Chief Executive Officer, INSA; **Rajeeva Sinha**, Former Whole-time Director Adani Ports & SEZ Ltd; **Vivek Kele**, President, AMTOI; **Anil Yendluri**, Director and Chief Executive Officer, Krishnapatnam Port Company Limited and **Prakash Tulsiani**, COO and Executive Director (Operations), Allcargo Logistics. The debate was chaired by **Michael Pinto**, Former Secretary, Ministry of Shipping.

Each speaker made a representation of his side of the story. The audience that was present in large numbers was




Session in Progress

made to vote twice during the session – once before and once after the debate. The difference between voting in the beginning and voting in the end was a function of how the gentlemen argued their case. Later, the matter was thrown open to the floor to participate by making points and asking questions. It was an intervening debate. The house believed that flawed maritime policies are responsible for slackened maritime growth.

Anil Devli, Anil Yendluri and Prakash Tulsiani spoke for the motion and spoke of how the lackadaisical approach of the government was responsible for the industry to lag

behind many other nations. Anil devli said, “Unfavourable policies, high taxation, lack of a funding mechanism for purchasing quality vessels was what set the Indian shipping industry back by many a decade.” His argument was support by Anil Yendluri who agreed stated that the issues facing the ministry have remained the same since two decades. Archaic Customs laws and restrictive trade practices were responsible for the damage, he said. Prakash Tulsiani, who was the other speaker that supported the motion said, “The current bottlenecks are issues that have been neglected for many years. The ship will take time to turn. Time taken for policies to be implemented is too long in Maritime sector.

Those who argued against the motion were primarily two former government servants and the President of the Association of Multimodal Operators. Deepak Shetty said, “We repealed 14 merchant shipping rules and did away with four archaic admiralty acts. He also said there were 16 merchant shipping rules being proposed to be coterminous with the new act.” Rajeeva Sinha, an industry veteran who also worked long in the government said government policies have contributed to the progress and that private parties have failed to implement projects on time in the country. He praised the PPP format that has worked wonderfully in developing and enhancing the port infrastructure in the country. Vivek Kele, the final speaker said that several income tax exemptions have been given for infrastructure development. Apart from these changes, the sagarmala project has been given great emphasis to the maritime industry where the coastal shipping and inland water transport have contributed greatly to the industry. 

Digitalisation will improve customer experience

Digitalisation will bring down the transaction cost, remove duplication of data and help optimise the infrastructure use, improving the customer experience



(L to R) **Sailesh Bhatia**, Managing Director, Bhatia Shipping Agencies; **John Vitkus**, Vice President - Sales, Asia Pacific, INTRA Pte Ltd; **Samir J Shah**, Chairman, Federation of Freight Forwarders Association in India; **S K Rahman**, IRS, Commissioner, Directorate of Systems & Data Management, CBEC, Ministry of Finance, GoI; **Vijay Minocha**, President, Asia Pacific, INTRA; **Purnendu Sekhar**, Founder, CogoPort-International Logistics; **A Janardhana Rao**, Managing Director, Indian Ports Association, Ministry of Shipping, GoI; **Sudeep Mehrotra**, Director-Corporate Solutions, Group, Alvarez & Marsal Transaction Advisory Group; **Surendra Lingareddy**, Director, Asia Pacific, Volteo; **Ramprasad**, Editor in Chief & Publisher, Maritime Gateway

Sabyasachi Hajara, Chairman, Editorial Advisory Board, *Maritime Gateway*, in his opening remarks talked about the improving situation in the maritime sector, growing consolidation and improving demand. “We should not only notice opportunities but also create them for the good of the industry and nation at large,” asserted **Prakash Tulsiani**, COO and Executive Director, Allcargo Logistics. His discussion touched upon development of infrastructure, Sagarmala and digitalisation in the industry. **Ramprasad**, Editor-in-Chief, *Maritime Gateway*, and moderator of the session triggered the discussion with his comments on disruptions happening in the industry impacting the way business is done, importance of technology with more and more shipping lines going digital and Maersk investing in digitalisation while encouraging startups to develop and promote innovative ideas.

Digitalisation is impacting all industries and shipping is no different, said **Sudeep Mehrotra**, Director – Corporate Solutions Group, Alvarez & Marsal. It effects customer experience and helps in cost optimisation by reducing the number of layers in value delivery.

“Customers in the next five years will have better processes to get shipping services.” Dis-intermediation will be a major change and more customer information will let in evolution of new business models.

One of the largest promoter of digitalisation has been Intra, automating documentation. Currently only 50 per cent of the industry is submitting documents electronically, informed **John Vitkus**, Vice President - Sales, Asia Pacific, Intra Pvt Ltd. Intra helps the industry to organise, collaborate operations, better share data.


Customers are demanding digitalisation as it increases transparency and decreases cost, revealed **Purnendu Sekhar**, Founder, CogoPort International Logistics. In other industries it is easy to calculate price, but in shipping it is not so simple. The entire industry should collaborate to make pricing more transparent and here technology steps in.

The Customs Department has been proactive in implementing digitalisation, remarked **SK Rahman**, IRS, Addl. Director General, Director General of Systems & Data Management, CBEC. The department has transformed from law enforcer to law facilitator. Measures such as

self-assessment, AEO and ICEGATE have been implemented. Single Window Interface for Facilitating Trade is helping in coordinated border management. Another government initiative under digitalisation is the launch of Port Community System that integrates flow of information, said **A Janardhana Rao**, MD, Indian Ports Association. Under the system all processes that increase cost have been examined and digitalised. It has various modules: Vessels, Containers, Transport and Customs. Stakeholders include major and private ports, Customs, railways, shipping lines, agents and 14 banks.

Taking a macro view, **Samir Shah**, Chairman, FFFAI said, we need a cargo community system and not just port community system. The PCS has different module for air cargo, sea cargo and land cargo. These should be consolidated. Voicing the pain points he said, digitalisation has not reduced the cost for freight forwarders and spending per move has to come down.

Digitalisation started in the 80's with the Customs department being one of the first implementers, revealed **Sailesh Bhatia**, MD, Bhatia Shipping Agencies. While shipping lines have moved from manual to digital filing of bills, but data is being used for internal use of the Customs department and shipping lines. “Digitalisation should move beyond data capturing to changing the way transaction is done.” PCS 2.0 should focus on incremental data and not repetition of data.

Surendra Lingareddy, Director, Asia-Pacific, Volteo, explained how IoT can help the industry perform better. Real-time tracking location and condition of trucks and containers will be possible. Sensor can help increase functioning of infrastructure at ports, reduce waiting time and detect anomalies. 

Future of Container Supply Chains

The supply chain is undergoing an unprecedented change on many fronts like policy, technology, verticalisation of services, and many more, where identifying the opportunity remains important



(L to R) **Shankar Shinde**, Chairman-CFS Committee, Brihanmumbai Custom Brokers Association; **Dr Rakesh P Singh**, Chairman, Institute of Supply Chain Management; **Prahlad Tanwar**, Director - Transport and Logistics, KPMG Advisory Services Private Limited; **Nityam Khosla**, Director, Teamglobal Logistics Pvt. Ltd; **Vinita Venkatesh**, Director, Krishnapatnam Port Container Terminal Pvt Ltd; **Umesh Grover**, Secretary General, CFS Association of India; **Nailesh Gandhi**, Director, Express Global Logistics Pvt Ltd

With intervention of technology and changing dynamics of domestic and global trade, it has become necessary to identify the evolution taking place in container supply network, thus finding clue to the future of the sector. The Session-II of the Containers India 2017 was focused on the essential aspect, 'Future of Container Supply Chains.' Moderator of the session **Umesh Grover, Secretary General, CFSAI**, said some of the major factors that will affect the container supply chain are advancement in technology like drones being used to deliver cargo; Data and information remain crucial to the supply chain; smaller operators would face difficult time with price negotiation as M&A among bigger companies lead to marketing consolidation; and warehousing sector empowered by GST.

Some of initiatives taken up at JN Port such as DPD have triggered a domino effect in the EXIM supply chain and divulging more details on reforms, **Shankar Shinde, Member of Managing Committee,**

Brihanmumbai Custom Brokers Association said even with DPD in place the role of CFS would remain crucial. The infrastructure of CFS could be used to provide support to the DPD volume. With the new Finance Bill, the importer must file Bill of Entry and Duty on time as a result cargo would be shifted fast. **Nityam Khosla, Director, TEAMGLOBAL Logistics**, who has recently set up a CFS with a new industry model to suit the changing environment, explained that one should take business cue from the law of nature which constantly advocates change. With a deep study of CFS, one could find that the concept of CFS in the initial days was based on a model of a yard to store cargo which were stuck due to many of the infrastructure bottlenecks. But in current scenario, CFS needs to evolve and they might be part of 3PL activities, cold chain, and e-commerce. **S. Padmanabhan of Sattva Group** also reiterated a positive growth for CFS business. Enlightening the delegates about

the development that could take place in the container supply chain scene, **Prahlad Tanwar, Director, Transport and Logistics, KPMG Advisory Services** said that there are five major factor that would influence the industry, which are verticalization of market, where one could develop business model built to serve a particular sector; polarization and consolidation of the sector; standardization; multi-modal operation picking up; and lastly evolution of distribution with consolidation of cargo taking place in certain places where container service could be offered. Deliberating the impact of GST on supply chain, **Nailesh Gandhi, Director, Express Global Logistics**, said that though there would short-term challenges due to GST but in the long-run it would give new dimension to the supply chain industry, including contract logistics. However, he cautioned about the litigation that logistics industry dealt with in the form of litigations between 2011 and 2017 related to service tax where ₹500-600 crore were spent on legal fees. Moreover there were issues related parity with regard to earning in terms of Indian currency vis-à-vis foreign currency. Gandhi said that there are seven specific problems related to GST which if not addressed would lead to increase in transaction cost. He stressed that the biggest concern in the GST law is lack of clarity on mixed service and composite service. **Dr Rakesh P Singh, Chairman, Institute of Supply Chain Management** said that if one would look at the framework on which companies plan and executive their strategies in India, we should have clarity on it. Companies should look at the whole domain of supply chain as a strategy to excel in changing business environment. [mg](#)



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Breaking the Glass Ceiling

The session stressed upon increasing contribution of women in the growth of port and shipping sector



(L to R) **Neera Saggi**, Former President of Bombay Chamber of Commerce & Industry; **Sanjam Sahi Gupta**, Founder & President, WISTA India; **Preetika Mehrotra**, Director, Regional Specialization Leader, Stanton Chase; **AS Venkatesh**, MD, Popular Foundations; **Sara Falaknaz**, Chief Global Innovation Officer, DP World, UAE; **Olga Lazovskaya**, Advisor to the President, Russian Chamber of Shipping; and Founder & President of WISTA Russia; **Danae Bezantakou**, MD, Navigator Shipping Consultants

Contribution and leadership of women in economy and trade has increased and like every sector, maritime industry is no different. Keeping this in view, **South Asia Maritime and Logistics Forum** had a dedicated forum for women, named as **South Asia Women Forum**, which was hosted by **Women's International Shipping & Trading Association (WISTA)** in association with *Maritime Gateway* and *Colombo International Maritime Conference (CIMC)*. The proceedings of the day started with welcome address by **Sanjam Sahi Gupta**, Founder & President, **WISTA India**, and Board Member of **WISTA International**. **Capt Vivek S Anand**, Director, **NYK Lines (India) Ltd**, in his opening remark said that half of the world's population is women, hence they should contribute equally to the world's resources in the form of social, education, economic and all other forms. He reminisced many initiatives taken up by **WISTA India**. On this occasion, **Dr. Malini V. Shankar**, **IAS**, **Director General of Shipping** recalled her experiences as women in public service. She women quitting jobs is a loss for the sector, and there were some challenges for women which were common in all sectors. A session was convened with the theme "Women transforming Shipping: Breaking the Glass Ceiling". While moderating the session, **Neera Saggi**, **Former President of Bombay Chamber of Commerce & Industry** raised concern over falling number of women workforce in the country. **Danae Bezantakou**, **MD**, **Navigator Shipping Consultants** (Greece); a member of **WISTA** for about two decades recalling her experience in the shipping sector and managing a company founded by her parents, said that there were not many women business leaders in Greece and there were efforts being made to create more women business leaders. **Olga Lazovskaya**, **Advisor to the President, Russian Chamber of Shipping**; and **Founder & President of WISTA Russia**, sharing her professional journey said that she had encouraged women participation in the marine insurance industry as the sector is mostly (95 per cent) dominated by male in Russia at a time when 55 per cent of country's work force is women, of which only 10 per cent are at management positions.



Sara Falaknaz, **Chief Global Innovation Officer, DP World, UAE**, stressed on the positive change in attitude taking place towards women workforce and also emphasized her company's effort in this direction. **AS Venkatesh**, **MD, Popular Foundations** said even though he doesn't belong to the sector but appreciated the accomplishments of the 'better half of his life' **Vinita Venkatesh**, Director, **Krishnapatnam Port Container Terminal**. He added about engagement in many community activities in the field of women empowerment to ensure a deserving life for them. Elaborating the stand of a working lady married to a traditional Indian family, he said it was essential to convey the message to all family members about the importance and contribution of a woman professional to an industry and society which made easy to garner support in the family. Conventionally defined roles of a man and wife needed to change and mutual respect to partner's role could help women to scale up in life. **Preetika Mehrotra**, **Director, Regional Specialization Leader, Stanton Chase**; and **Executive Committee Member of WISTA Hong Kong** recalling her association with maritime sector said as part of an MNC executive search firm she encouraged more participation of women in the industry at managerial positions. Notably, some of the senior leaders and dignitaries from the sector **Capt. Vivek Singh Anand**, **Dr. Deepak Shetty**, **Capt. Anil Singh**, and **Sabyasachi Hajara**, among others were present to support their women colleagues at the forum. [img](#)

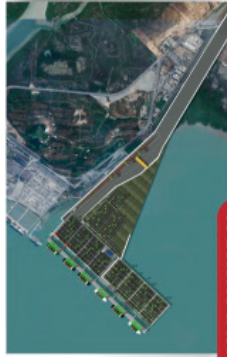
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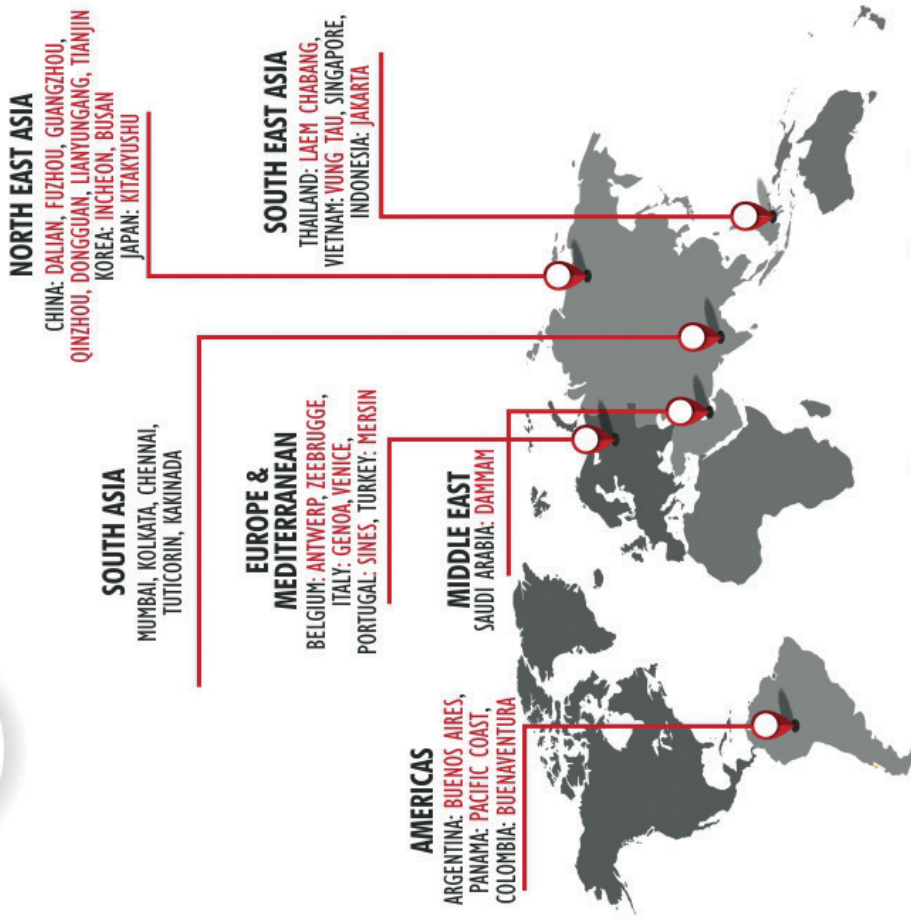
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An Evening

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This is the evening the industry comes together to cheer for the champions who pushed the boundaries in whatever services they offer



The evening of 7th September was like none other. At one of Lalit's finest Ballroom's shipping greats came together for the glitzy **Gateway Awards** ceremony. The sea men and shore from all of the country came dressed in their finest best of greys and blues and the growing tribe of ladies in the shipping business painted the hall with their bright hues. This was the evening the industry chose to celebrate with their colleagues and peers for carrying the industry through successfully for another year.

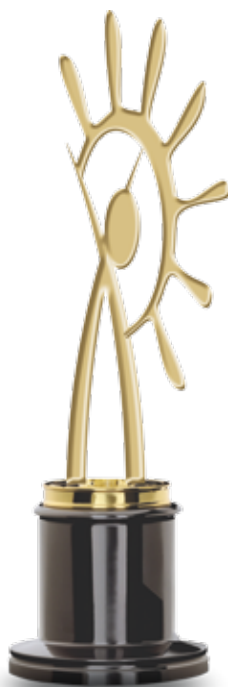
The gathering cheered for the champions who through their perseverance pushed the boundaries in everything from customer service, new products to using technology to disrupt the way business is done. It was a night where the industry stood up together to celebrate excellence, innovation and best practice across the sector.

About 16 award categories were enlisted and all Indian maritime companies were invited to nominate their business entities for evaluation by the Gateway Awards Jury. The parameters for business growth that were con-

sidered for shortlisting were volume growth, asset growth, productivity, and the main efficiency indicators were capacity utilisation, turn around time and dwell time of vessels. The other main indicators to net awards were innovation and investment to improve customer service, improvement in connectivity to ports and CFSs. Through a detailed jury process, data received from the nominees was reviewed and the winners were selected on the jury member voting individually. International tax and audit firm EY examined all data received.

The recipients accepted the awards to a thunderous applause and many a standing ovation. Once the awards were given and just when everyone thought it was over, one person made a grand entry and elevated the level of the awards ceremony a notch higher. Former Shipping Minister Shatrughan Sinha walked on the red carpet and the majesty of his persona added the glitz to the ceremony. As he took to the stage, the gathering cheered loudly for their star who was instrumental in ensuring the shipping industry was rid of many deficiencies during his time as Shipping Minister. In his address, he inspired others to achieve the same lofty heights of achievement.

The awards evening may now be over but our Gateway Awardees will be justly entitled to bask in the glow of their success for the next 12 months until their peers up the benchmark higher to qualify and bag next years awards. A terrific night of celebration marked out a superb set of winners. [mg](#)



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Industry honours their beloved shotgun shatrughan

Former Union Minister for Shipping and Bollywood superstar Shatrughan Sinha walks in amidst an enthralled audience to receive the lifetime achievement award



(L to R) **Ramprasad**, Editor in Chief & Publisher, Maritime Gateway; **Michael P Pinto**, Former Secretary, Ministry of Shipping; **Shri Shatrughan Prasad Sinha**, Former Union Cabinet Minister For Shipping, Govt of India; **Anil Singh**, Sr VP & MD, ISC, DP World

The hearts of who's who gathered at the Gateway Awards night missed a beat when the Bollywood superstar of the 70's and the former Union Minister of Shipping, Shatrughan Sinha stepped on the stage. The entire audience was awestruck, or say the proverbial "KHAMOSH" holding up their smart phones to take a quick snap of the celebrity.

A great orator, Shatrughan Sinha nurtured a unique style of his own during his run in the movies with power-packed performances and even on the political side his contribution during the stint as the Union Minister of Shipping from January 2003 to May 2004 was no less. Sinha had presented the blueprint of the ₹1,00,000 crore Sagar Mala project to the then Prime Minister, Atal Bihari Vajpayee and the proposal for forming Sagar Mala Development Authority was also floated during his term.

"Now that I am felicitated and honoured for my contributions to the maritime sector, I can now firmly believe that the 'ACHHE DIN' are not far away," remarked a humbled Sinha in his strong and dominating voice.

Earlier, Sinha had served in the Ministry of Health as well, "I have also served as the Health Minister and health has been a very favourite subject of mine till date. I have been going around the country and abroad as well for cancer awareness programmes and anti-tobacco campaigns, but shipping till date remains my most favourite department," revealed the former Minister of Shipping.

Sharing pearls of wisdom from his long and glamorous career, Sinha said, "I do not know whether I have been able to prove myself better than the best or not, but surely you all know that I have been different

1969 – Started acting career with first film Sajan

1971 – Got first lead role in film Mere Apne

1996 – 2002 Member, Rajya Sabha

2002 (July) – 2003 (Jan) Union Cabinet Minister, Health and Family Welfare

2002 – 2008 Re-elected to Rajya Sabha (2nd term)

2003 (Jan) – 2004 (May) Union Cabinet Minister, Shipping

2008 – Made debut on television as the judge in The Great Indian Laughter Challenge, season 4

2009 – Elected to 15th Lok Sabha

2009 (Aug) – Member, Standing Committee on Transport, Tourism and Culture

2014 (May) – Re-elected to 16th Lok Sabha (2nd term)

2014 (Sep) – onwards Member, Standing Committee on Transport, Tourism and Culture Member, Consultative Committee, Ministry of External Affairs and Overseas Indian Affairs

from the rest and that is the reason 'KHAMOSH,' which is otherwise a very rude and crude word has become a signature tune today. The reason this rude word is today used even in an amusing manner is because of the way I have presented it and this is the most important thing – the way you present things."



INDIAN MARITIME BUSINESSMAN OF THE YEAR

Anil Singh, Sr Vice President & Managing Director ISC, DP World Pvt Ltd



For diligently working towards enhancing the operational parameters of the terminals, facilitating expansion and ensuring DP World stays ahead of competition, Anil Singh, Vice President and Managing Director, Sub-continent was awarded the Indian Maritime Businessman of the Year Award. It was presented to him by Michael Pinto, IAS (Retd) Former Secretary, Ministry of Shipping and M Riaz Hamidullah, High Commissioner, Bangladesh High Commission, Sri Lanka; Anil Singh, Sr Vice President and Managing Director, ISC, DP World; Michael Pinto, IAS (Retd) Former Secretary, Ministry of Shipping.

We have been diligently working towards the social and economic welfare of our port communities around the globe and our continuous focus on skill development of women and youth, quality healthcare, environmental sustainability and safety are some of our core values, and an integral part of who we are and what we do.

Captain Anil Singh has been in the maritime industry for 35 years having spent his earlier years at sea. He joined DP World from Thailand, where he spent seven years as Group CEO of container terminals B1 and A0, a joint venture between APM Terminals, PSA and Marubeni. He was involved with acquisitions, expansion while developing industry best practices leading to a throughput of 1 million teu in 2007.

Singh had also worked at senior management level for P&O Australia for about 13 years, of which he was in Papua New Guinea for 8 years as Managing Director of Century Group, a company operating in the field of Ports, Ship-owning, Ship-agency, Mining and Petroleum logistics for metal and mining major BHP Rio Tinto and American multinational energy conglomerate Chevron.

His other assignments included CEO of Nhava Sheva Container Terminal, Mumbai, and as Project Manager for Asia/South America region based in Sydney. Before moving to the Subcontinent, Capt. Singh headed DP World's Africa area. Whether it was introducing technology at the port gates to hasten truck movement or aiding the productivity scheme at JNPT, he has been leading

(L to R) **H E M Riaz Hamidullah**, High Commissioner, Bangladesh High Commission, Sri Lanka; **Anil Singh**, Sr Vice President and Managing Director, ISC, DP World; **Michael Pinto**, IAS (Retd) Former Secretary, Ministry of Shipping

the effort from the front. Under his leadership, there was a 4.5 percent increase in tariff rates at the Vallarpadam terminal ensuring greater returns and also measures to step up the efficiency at the terminal were implemented. To improve movement of cargo from and to the port, DP World-operated Container Rail Road Services also added two new rail services to their portfolio for improving connectivity between Jawaharlal Nehru Port with Kanpur, and Mundra with ICD Bawal in Rewari district of Haryana. These services were envisaged by the firm to operate on eco-friendly and energy-efficient modes of transport to ease congestion at ports and national highways.

Through these measures, Anil Singh's actions demonstrated that the Subcontinent region plays a strategic role in DP World's long-term growth plans. It was also in the same year that DP World created an Indian holding company to invest in container terminals, among other projects, across India. DP World currently operates six container terminals in India, including Chennai, Mumbai, Kochi and Mundra. The firm is understood to be evaluating acquisition opportunities in the bulk and liquid businesses. The idea of restructuring is to provide the firm with better control over their companies. Currently, they have different companies for each port and this rejig will help all the group companies converge under one firm.

DP World is involved in marine and inland terminals, maritime services, logistics and ancillary services to technology-driven trade solutions. The company has presence in 31 countries across six continents with a significant presence in high-growth and mature markets. Container handling is company's core business and generates more than three quarters of its revenue. With a number of projects in the pipeline, its capacity is expected to touch more than 100 million teu globally by the year 2020. In Asia Pacific and Indian Subcontinent alone, the group has presence in 11 countries with 26 operating terminals with combined capacity of 35 million teus.

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CONTAINER PORT OF THE YEAR

Adani Ports and Special Economic Zone Limited

When we think of India's largest port-based company and the country's largest port-based manufacturing hub, the first name that comes to our mind is Adani Ports and Special Economic Zone Limited. Posting an astounding growth of 16 per cent Y-o-Y in FY2016-17 and a record throughput around 3.5 million teus APSEZ stood out in the competition and has emerged as the proud winner of the Container Port of the Year Award.

APSEZ has an installed capacity of 5.1 million teus which includes capacity addition of 800,000 teus in FY 2016-17. It has a yard area of 100 hectares and comprises of all terminals in the port. The port has established amazing efficiency indicators with a capacity utilisation of 80 per cent. Highly streamlined operations have maintained the average turnaround time at 0.85 days, while the average pre-berthing detention time is 8.17 hours. High-end infrastructure used at the port has

(L to R) **Sanjay Khunt,** Sales Manager, Liebherr Maritime Cranes; **Capt Vivek Anand,** Director, NYK Line (India) Ltd; **Shahzad Athar,** General Manager-Marketing and representatives from Adani Ports and Special Economic Zone; **Capt. Rahul Choudhuri,** MD – AMEA, Veritas Petroleum Services.

marked the average output per ship berth day at 2,261 teus, while the growth in average output per ship berth day on a Y-o-Y basis in FY2016-17 over FY 2015-16 is 2 per cent (in million tonnes). With 28.79 moves per hour, the average crane productivity is among the best in the country and has ensured quick clearance of cargo.

The port has further upgraded its infrastructure to keep up its performance with the addition of 3 Quay Cranes at AICTPL, 4 Quay Cranes at ACMTPL, 9 RTGs at AICTPL, 12 RTGs at ACMTPL and 3 RMGCs at the rail head. Two berths at ACMTPL have been added to accommodate the growing traffic.



BULK PORT OF THE YEAR

Krishnapatnam Port Company Limited

The port has an installed capacity to handle 60 million metric tonnes of dry bulk cargo and an operational yard measuring 93.98 hectares in area. It has a storage capacity of 4.70 million metric tonnes and offers a turnaround time of 45 days. The port operates a spacious warehouse measuring 1.86 lakh m² with a storage capacity of 0.50 million metric tonnes.

To further support the huge growth in movement of bulk cargo the Western Berth with a 5 million metric tonnes of capacity has been added. Three railway sidings- C-5A, LH-3 & NEC-6 have been commissioned. Three rakes per day per siding are operated which is equivalent to 0.35 million tonnes. Dry cargo operations at the port have recorded 53.25 per cent capacity utilisation. Average turnaround time for gearless vessels is 3.36 days and that for rakes is about 6 hours. The port has an average pre-berthing detention time of 2 hours for gearless vessels. The average output per ship berth day, considering only gearless vessels is about 33,547 million tonnes.

The largest and most-efficient port on India's east coast, Krishnapatnam Port Company Ltd has bagged the Bulk Port of the Year Award, posting a record dry bulk cargo handling of 36.11 million metric tonnes. During the evaluation period, 3,098 rake operations moved 10.61 million metric tonnes of dry bulk cargo.

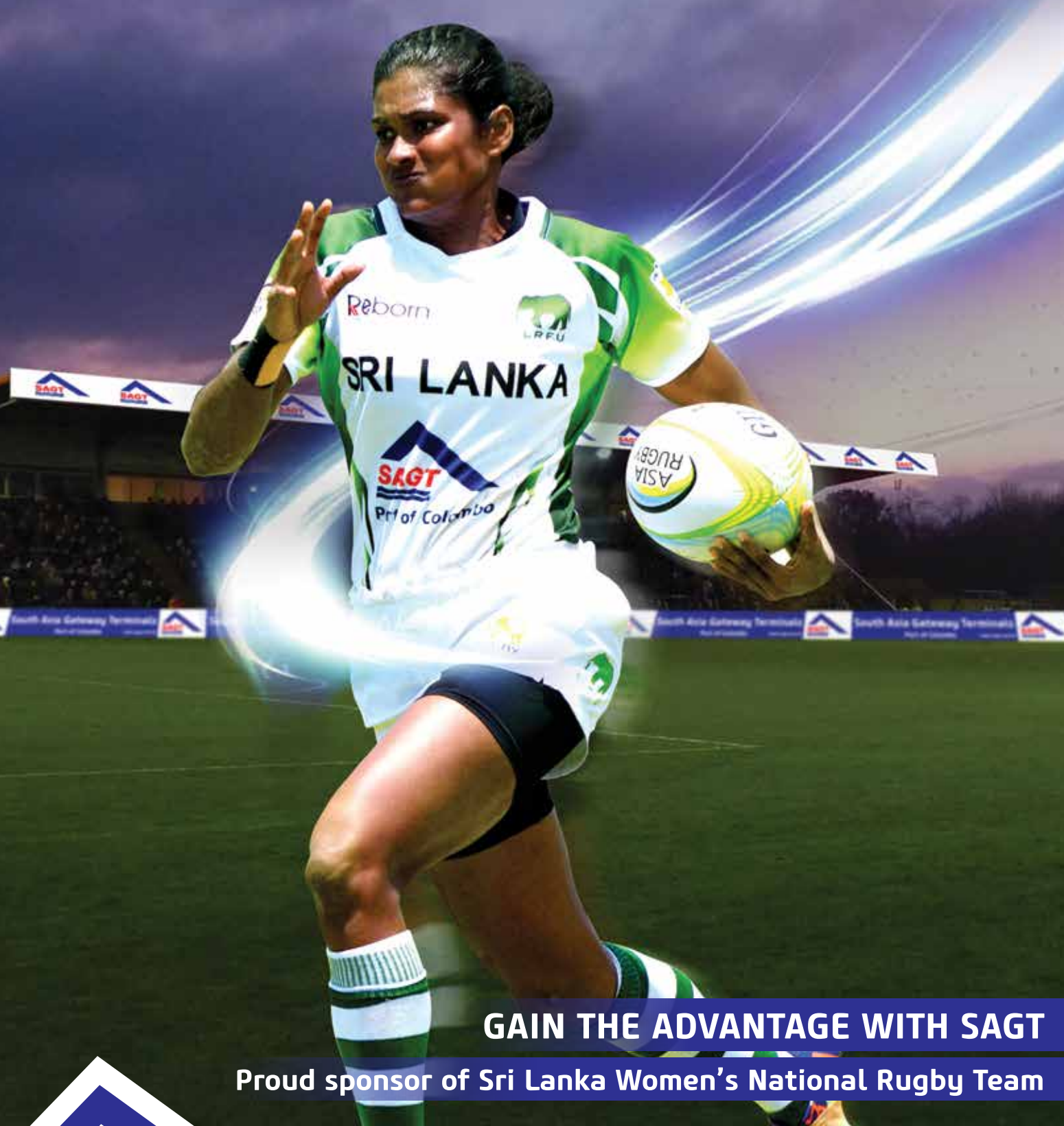
Dry bulk cargo operations at the port have recorded a growth rate of 16 per cent (considering only gearless vessel movement) in FY2016-17. About 3,608 rakes moved 13.21 million metric tonnes of dry bulk cargo in the FY2015-16, as compared to 3,098 rakes moving 10.61 million metric tonnes of the cargo in FY2016-17.

(L to R) **Capt Vivek S Anand,** President, MANSA; **Jitendra Nimmagadda,** COO- Containers, Krishnapatnam Port Company Limited; **Capt Rahul Choudhuri,** MD, AMEA, Veritas Petroleum Services



A Colleague told me I run like a girl;

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CONTAINER TERMINAL OF THE YEAR (ABOVE 600,000 TEUs)

Jawaharlal Nehru Port Container Terminal

Jawaharlal Nehru Port Container Terminal (JNPCT) gains from its strategic location at JN Port, Nhava Sheva. JNPCT over the years has taken series of measures for improving productivity parameters leading to record achievements. Notably, JNPCT was the only terminal at JN Port to register positive growth in FY2016-17, even though it is struggling with capacity crunch. Its proactive strategies to ease congestion, smooth delivery of containers and revamping infrastructure to support trade amidst adverse conditions along with performance and operational growth influenced the jury to recognize JNPCT as "Container Terminal of the Year" for the above 0.6 million teus category and bestowed with The Gateway Awards 2017.

JNPCT is the lone terminal which is owned and operated by the JN Port Trust. The terminal has also taken a series of initiatives such as the commencement of inter-terminal movements, which facilitated lateral movements of container trucks to decongest the terminal. Inter-terminal movement of trailers avoided a transit of 7.5 km

(L to R) **Capt Vivek S Anand**, President, MANSRA; **Neeraj Bansal**, Deputy Chairman, JNPCT; **Capt Dinesh Gautama**, President, Navkar Corporation Limited; **Capt Rahul Choudhuri**, MD,AMEA,Veritas Petroleum Services



on the Port roads. It is estimated that there is an 8 per cent reduction in movement on Port roads and a gain of ₹125 crore to the trade due to savings in fuel in one year alone. The terminal's average berth productivity has increased by 4.74 per cent from 64.98 moves per hour in FY2015-16 to 68.06 moves per hour in FY2016-17. The terminal has handled 1,533,975 teu in FY2016-17 surpassing previous year's volume of 1,401,290 teu and registered 7.33 per cent Y-o-Y growth in terms of teus and 1.78 per cent in terms of tonnage. JNPCT handled 401,305 teus in the 1st quarter of FY2017-18, as compared to 399,306 teus during the corresponding quarter of previous year registering a growth of 0.5 per cent.

CONTAINER TERMINAL OF THE YEAR (BELOW 600,000 TEUs)

Krishnapatnam Port Container Terminal Pvt Ltd

One of the highlights of the terminal's achievement has been significant growth in transshipment cargo volume. Transshipment on east coast has been an untapped market as most of the cargo is still being handled at the nearest foreign hub ports. First time, KPCT has started handling transshipment cargo under PIX service which was earlier used to serve the Singapore transshipment hub. With the launch of this new service KPCT has become one of the emerging transshipment handling container terminals in south and east India. The surge in EXIM transactions at the terminal could also be attributed to the commencement of CONCOR's new rail movement between ICD Bangalore and ICD Sanath Nagar to KPCT. Several mainline carriers have started their services from KPCT as the support of exporters and importers to KPCT grew exponentially. Positive growth across all performance parameters of the terminal is likely to further ramp up growth of the terminal in the coming years.



One of the prominent container handling facilities on the east coast of India is Krishnapatnam Port Container Terminal which since its inception has constantly evolved itself to continue with robust growth in cargo volume. The terminal's strategy to enter into new markets and serving the trade with advanced and more efficient infrastructure helped it to register a whopping Y-o-Y growth of 115 per cent in FY2016-17. Recognising its efforts and achievements in the segment the jury selected Krishnapatnam Port Container Terminal as the winner of "Container Terminal of the Year" for the below 0.6 million teus category.

(L to R) **Capt Vivek S Anand**, President, MANSRA; **Vinita Venkatesh**, Director, Krishnapatnam Port Container Terminal Pvt Ltd; **Capt Rahul Choudhuri**, MD,AMEA,Veritas Petroleum Services



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CONTAINER LINE OF THE YEAR

CMA CGM Agencies India Pvt Ltd

Commitment to Indian operations, expanding services and port calls and aggressive hinterland penetration has bought CMA CGM Agencies India Pvt Ltd into the spotlight as it walked away with the Container Line of the Year Award. Having presence at 6 gateway ports and 7 feeder ports within the country, the shipping line also provides intermodal solutions covering accessibility to and from 43 inland locations.

CMA CGM operates through a global fleet of 445 vessels, of which a significant 165 vessels operate on the Indian coast. A large fleet is bound to move a huge number of containers and CMA CGM has moved more than 0.75 million teus of containers through the 15 services it operates to and from India. Out of these 13 are direct services and 2 are feeder services. The shipping line has launched 'Aquaviva' Containers, which have become the signature of OCEAN Alliance. It has also signed a MoU with ENGIE to develop technology to launch LNG powered container ships. CMA CGM strives to

(L to R) **Capt Swaminathan Rajagopalan**, Commercial Director, CMA CGM Agencies India Pvt Ltd; **Audrey Dolhen**, MD, CMA CGM Agencies India Pvt Ltd, Representative from CMA CGM; **Raj Khalid**, India Representative, Port of Antwerp; **Umesh Grover**, Secretary General, CFSAL



make its operations eco-friendly which reflects in the 4 per cent improvement of energy efficiency as compared to operations in 2015. A recent strategic partnership with Infosys aims to further simplify and transform CMA CGM's IT applications and improve customer service excellence. Infosys will also open a center for development and innovation in Marseilles to further upgrade technology of CMA CGM in that region. Another IT development center will be opened in Dubai strengthening the shipping line's presence in the Middle East. CMA CGM aims at continual development of E-Business platform offering end-to-end business avenues to its customers.



INLAND CONTAINER DEPOT OF THE YEAR

Adani Logistics Limited – ICD Patli

Innovation in operations, value proposition to customers and creating record volume handling has made Adani Logistics Ltd – ICD PATLI the proud recipient of the Inland Container Depot of the Year award. In spite of the tough competition the ICD has improved its business in the region, registering more than 33 per cent growth in FY2016-17. The ICD has seamless connectivity both on the east and the west coast to ports including Mundra, Pipavav, Hazira, JNPT, Kattupalli and Chennai. While most of the Indian ports are blamed for high dwell time of cargo, the ICD has maintained swift movement of cargo with an average dwell time of around 100 hours for exports and average dwell time of 72 hours for imports.

(L to R) **Shantanu Bhadkamkar**, Chairman, IFCEA; Representative from Adani Logistics Ltd; **Anil Radhakrishnan**, MD, Adani Logistics Ltd; **Rajeshwar Bhatt**, Director, Suraj Informatics

Turnaround time of trailers is a major factor that reflects upon the operational efficiency of an ICD and ICD Patli has ensured to keep the trailers carrying exim cargo moving fast with an average turnaround time of two and half hours. The ICD has massive storage space with 5000 ground slots available anytime for storing containers. A key indicator of the growing business at the ICD is the high movement of containers in and out. About 250 teus come into the ICD on a daily basis and around 200 teus are moved out.

The ICD has developed state-of-the-art infrastructure and equipment which has boosted its annual handling capacity to 200,000 teus per annum. It also maintains container yards with separate entry / exit points for dedicated storage of cargo. A Custom Bonded warehouse with 50,000 Sq. ft area, EDI On ICE GATE 1.5 and notified for all customs schemes is also made available for the convenience of the exim community.



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CONTAINER FREIGHT STATION OF THE YEAR **Allcargo Logistics Ltd – CFS Koproli**

Innovation in operations, value proposition to customers and creating record volume handling has made Allcargo Logistics Ltd – CFS Koproli stand ahead of the competition and be the proud winner of the Container Freight Station of the Year Award. In spite of the growing competition and the Direct Port Delivery initiative of the government the CFS has managed to post an impressive growth rate of 9 per cent in FY2016-17.

While high dwell time has always been a remark on Indian ports, the CFS has managed to set an example for its peers in the industry by recording average export dwell time of 24 hours and average import dwell time of 192 hours. Another key performance indicator of the CFS is the efficiency in turnaround time of trailers. The CFS has a swift average trailer turnaround time of less than an hour.

With a vast storage and warehousing space of

(L to R) **Shantanu Bhadkamkar**, Chairman, IFCBA; **Prakash Tulsiani**, COO & Executive Director (Operations), Allcargo Logistics Limited; Representative from Allcargo Logistics Ltd; **Michael Julian Bevis**, Senior Director Group Relations, South Asia, AP Moller-Maersk



3,99,772 sq.ft., the CFS has 2,190 ground slots. It has earmarked dedicated areas of 2 acres to handle DPD containers and 1.5 acres to handle open bond containers. The customer centric approach of the CFS is highlighted by the fact that it has modified the orientation of the container yard which increased the yard space by 14 per cent and operational cost declined by 9 per cent. The approach helped customers in saving time and effort by quickly processing their cargo for examination and destuffing. The CFS has earmarked a dedicated areas of 2 acres to handle DPD containers and 1.5 acres to handle open bond containers.



COASTAL SHIPPING OPERATOR OF THE YEAR **The Shipping Corporation of India Limited**

a whopping growth of 27.49 per cent on a year-on-year basis in handling containerised cargo. All the coastal operations are handled by the SMILE and PIX2 Service that touch on the either coasts of India connecting Mundra, Pipavav, Cochin, Tuticorin, Kattupalli, Krishnapatnam, Chennai, Vizag and Haldia ports.

The Shipping Corporation of India Ltd (SCI) has taken the baton to promote coastal shipping as a service to the customers and the nation by going beyond commercial considerations. And this very commitment has fetched the largest fleet owner of the nation with the Coastal Shipping Operator of the Year Award.

SCI operates a fleet of 69 vessels of about 5,850 million DWT. In container division, SCI is operating two ships on Indian coast with a capacity of 1,800 teus and a larger one with 4,300 teus capacity. In the FY2016-17, SCI handled 26,513 teu of containerised cargo on the coastal route. In spite of the slump in global trade SCI managed to post

(L to R) **Shantanu Bhadkamkar**, Chairman, IFCBA; **Capt Anoop Kumar Sharma**, CMD, The Shipping Corporation of India Ltd; **Michael Julian Bevis**, Senior Director Group Relations, South Asia, AP Moller-Maersk

To further boost its coastal operations SCI has made new additions to its fleet. A Cellular Vessel of 4,300 teus capacity and a DWT of 57,500 metric tonnes has been pressed into service recently. This is the largest ever vessel to operate on the Indian coastal route. CIX Express service is a new service added which is basically a re-orientation of port rotation and addition of new ports as per the movement of the coastal cargo. The Shipping Corporation of India has also emerged as the most diversified Indian company with accumulated overall capacity of 5.850 million DWT, catering to various segments of shipping. SCI further focuses on establishing a major global presence in energy and niche container shipping, considering the fact that demand for energy in South Asia is on the rise.

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FREIGHT FORWARDER OF THE YEAR

Chinubhai Kalidass & Bros

Chinubhai Kalidass & Bros. bagged the Freight Forwarder of the Year Award for offering freight forwarding services for multiple cargo and competing with international players. As a freight forwarder serving the exim community they have regularly evolved and upgraded their services in line with the changing customer trade requirements. The freight forwarder handled 0.56 million tonnes of non-containerised cargo volumes in FY2016-17, while the containerised cargo handled stood at 1,09,250 teus. Chinubhai Kalidass managed to post a smart growth in handling both containerised and non-containerised cargo. A growth rate of 31.90 per cent was recorded in non-containerised cargo handling on a year-on-year basis in FY2016-17, while the growth in containerised cargo handling stood at 50.25 per cent. The freight forwarder operates through a network of 15 own offices in India. It has a global footprint in 785 cities across 189 countries through partners and agents.

(L to R) Representative from Chinubhai Kalidass & Bros; **Dharshan Sheth**, Partner, Chinubhai Kalidass & Bros; **Raj Khalid**, India Representative, Port of Antwerp; **Umesh Grover**, Secretary General, CFSAI



Chinubhai Kalidass & Bros. handled 96,958 Customs files in FY2016-17, which is an indicator of the huge customer base the freight forwarder services. They operate through a warehousing space of 1,30,000 Sq.ft. and have improvised operations to customer satisfaction. For instance, boarding pass is issued for containers similar to airline boarding pass which means once issued, loading on a specific vessel is certain. They have installed fully integrated Enterprise Resource Planning system with auto updates to customers and the entire process of documentation, customer service, sales, quotations and finance is automated. The IT implementation helps the freight forwarder to cope up with the growing digitalisation in the industry.



EXCELLENCE IN MARITIME EDUCATION

Narottam Morarjee Institute Of Shipping

This award recognises a maritime educational institute that offers superior training to the seafarers to become more competent and efficient with the best maritime knowledge. Judging criterion included the institute's physical infrastructure, real-time exposure, student-centric teaching methodology, quality of education, quality of training and presence of well-experienced faculty. The institute scored on many grounds including starting live virtual classrooms in weekends for distance education students and also offering scholarships for the underprivileged students. Its courses in various aspects of shipping ensure students interested in commercial shipping make a career

(L to R) **Michael Julian Bevis**, Senior Director Group Relations, South Asia, AP Moller-Maersk; **Capt M M Saggi**, Director, Narottam Morarjee Institute of Shipping; Representative from Narottam Morarjee Institute of Shipping; **Umesh Grover**, Secretary General, CFSAI; **Shantanu Bhadkamkar**, Chairman, IFCBA

for themselves and their placement programme is often the most visited by industry professionals for hiring bright seafarers. The institute's post graduate programmes in ship management is among the most sought after programmes and each year the intake for this course has only been growing higher. Almost 600 students enroll each year for various programmes with tests conducted thrice a year in eight centres in the country. Their programmes have been recognised by various authorities such as the Director General of Shipping and the Department of Education. The presence of highly reputed industry professionals as faculty prepares the students to be absorbed in to the industry immediately almost nullifying the gap between academics and the industry requirements. Specialized courses offered at the institute are of great help and benefit to those who wants to make a real career in commercial shipping. Almost all students find placements, either during course or shortly after completion. NMIS also posts employment opportunities on its website to help students identify lucrative career opportunities.

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AP Economic Development Board



Mrs Koka Sudha, IRS
Commissioner, CPC
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Customs Preventive Commissionerate



Mr Anil Yendluri
Director & Chief Executive Officer
Krishnapatnam Port Company Ltd



Mr R Dhananjayulu, IRTS
Divisional Railway Manager,
Vijayawada Division
South Central Railway



Mr Addanki Sridhar Babu, IAS
Secretary
Tobacco board



Dr Koya Praveen, IPS
Director of Ports,
Department of Ports, Andhra Pradesh



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- 13.30hrs Onwards : Registrations
- 14.30hrs – 15.30hrs : Inaugural Session -
**Emerging Infrastructure
and Logistics Opportunities**
- 15.30hrs – 16.30hrs : Business Session 1
**Smart Logistics Plan
for Efficient EXIM Operations**
- 16.30hrs – 17.00hrs : Coffee Break
- 17.00hrs – 18.30hrs : Business Session 2
**Smart Transport – Rail, Road, Sea
and Coastal Cargo Movement**
- 18.30hrs – 19.00hrs : Networking Over Cocktails
- 19.00hrs – 20.30hrs : **Smart Logistics Awards**
- 20.30hrs Onwards : Networking Cocktails Dinner

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CSR EXCELLENCE OF THE YEAR DP World

DP world India bagged an award under the CSR excellence of the Year Category for being one of the most socially responsible and impactful organisations for undertaking a lot of activities to benefit communities at large. The jury was impressed especially with the DP world's wide range of socially responsible activities being offered to the needy and also for its efforts to build the sustainable societies and communities. One of the major programmes undertaken is rebuilding deprived societies. DP World has been consistently working towards building confidence in them, providing livelihood opportunities and ensuring they have access to quality education and healthcare facilities. About 1600 women residing in slums were given training in skill development. Of them, about 400 trainees were successfully placed in different jobs and about 800 of them are able to eke their livelihood. In addition, about 500 women were trained by the Industrial Training Institute in Bhuj and are now able to sustain themselves. On the health front, about 22,000 villagers in Mundra were provided with basic health facilities and were treated for common diseases by the medical van that travels to villages to cater to their health needs.

(L to R) Representative from DP World; **Monal Srivastava**, Regional Head-Human Capital, DP World; **Raj Khalid**, India Representative, Port of Antwerp; **Umesh Grover**, Secretary General, CFSAI



About 6,000 villagers in Raigad district were also treated. In association with the Mundra Institute of Medical Sciences, DP World has transformed the healthcare landscape of this town. DP World believes that community development is key to a sustainable future. In keeping with the social development goals, their programmes are designed to address the needs of people keeping in mind the future of the society and the country. The Mundra Institute of Medical Science managed by DP World has transformed the landscape of healthcare in Mundra taluka, treating 7280 out patients during the evaluation period. The in-patient department has facilitated 871 patients with quality healthcare services.



CSR EXCELLENCE OF THE YEAR Balmer Lawrie & Co Ltd

Balmer Lawrie is one such company that has excelled in improving the basic necessities of deprived societies while improving sanitation conditions. Construction of sanitation facilities was one of the major activities undertaken by the company along with other, which draw attention by the Jury for honouring Balmer Lawrie as CSR of the Year. Apparently, Shipping industry also stands ahead of others when it comes to improve the standard of the societies and communities in rebuilding the nation.

(L to R) Representative from Balmer Lawrie & Co Ltd; **Manas Kumar Ganguly**, COO, Balmer Lawrie & Co Ltd; **Umesh Grover**, Secretary General, CFSAI; **Raj Khalid**, India Representative, Port of Antwerp, Representative from Balmer Lawrie & Co Ltd,

Sustenance (BLISS) and Samaj Mein Balmer Lawrie (SAMBAL) for providing long term economic sustenance for the under privileged and improving the standards and quality of their life is what the two programmes cater to. Under these programmes, schools were adopted, homes, water tanks and toilets were constructed in the communities where people did not have these basic facilities. Under the Swachh Bharat Abhiyan, about 300 toilets were constructed across India at primary schools that helped address the problem of open defecation. Balmer Lawrie also extended support to projects focussed on the upliftment of tribal students run by friends of Tribal Society known as EKAL Vidyalayas. In its effort to promote girl child education, the firm also funded the construction of a school in Mogapair near Chennai to ensure girl children from marginalised communities gain access to the gift of education.

Balmer Lawrie supports two family homes at SOS children's village one each in Kolkata and Visakhapatnam. Two class rooms have been sponsored under the Corporate Leverage and Support Scheme of Indian Institute of Cerebral Palsy for supporting the differently abled, particularly children suffering from Cerebral Palsy.

The award was given away to state-run Balmer Lawrie and Company Limited for their two flagship programmes. Balmer Lawrie Initiative for Self

YOUNG MARITIME PROFESSIONAL OF THE YEAR

Ms Audrey Dolhen **Managing Director, CMA** **CGM Agencies India Pvt Ltd**



This award is given to a professional under the age of 45 working in any segment of the of maritime or transport industry in India who is deemed to have made a special contribution to his or her industry in the last twelve months. Audrey Dolhen, Managing Director of container shipping line CMA CGM India was unanimously chosen for this award by the jury for having gone the extra mile in her dedication to ensure the line is a force to reckon with in India. In the last one year through her individual efforts and that of her able team's she has ensured the French Carrier is one of the best places to work with in the country. Apart from aspiring to be the

(L to R) **H.E Mr M Riaz Hamidullah**, High Commissioner, Bangladesh High Commission; **Audrey Dolhen**, MD, CMA CGM Agencies India Pvt Ltd; **Michael P Pinto**, Former Secretary, Ministry of Shipping

best employer, her efforts were also commended for driving the line's operations forward in many aspects. On the sea side, new services were introduced to various destinations and on the shore side several steps were taken to enhance customer experience. In her words, customer services are being placed at the heart of our activity and constantly looking at ways and means to offer value added services to the clients. For the group being one of the best maritime and logistics provider in India, the credit largely goes to her for aligning the headquarter's objectives with goals to be achieved in India. Thanks to her effort in building the existing network of offices, the line's local recognition has tremendously improved even as CMA CGM Group pursues its development to be a fully integrated operator on the Intermodal, Container Freight Stations, Logistics and Terminal fronts, by using all group synergy inside and outside India.

SPECIAL JURY AWARD

Mr N Ramachandran, **Former Chairman, Cochin** **Port Trust**

N Ramachandran, Former Chairman, Cochin Port Trust was felicitated with the Special Jury award in recognition of his services to the maritime industry as the erstwhile Chairman of Cochin Port Trust for the development of Transshipment Container Terminal and also for creating required infrastructure ahead of the demand.

Ramachandran took over the reins of Cochin Port Trust in 2005 from Jacob Thomas whose term ended on July 31 that year. He served as the Chairman and CEO of the port for the period 2005-11. During his tenure, apart from implementing a slew of modernisation initiatives, developmental and infrastructural projects, he served as Chairman of High Level Committee on the security preparedness of India's major ports and commercial maritime operations.

During his career in the police service, Ramachandran has done extensive work on the



(L to R) **H.E Mr M Riaz Hamidullah**, High Commissioner, Bangladesh High Commission; **Michael P Pinto**, Former Secretary, Ministry of Shipping; **N Ramachandran**, Former Chairman, Cochin Port Trust

national security implications of insurgency, terrorism, illegal immigration, transnational weapons and drug smuggling. A highly decorated and accomplished member of the Indian police service, he served the states of Assam and Meghalaya and has extensive experience in field policing, district and state level police administration, intelligence, counter terrorism and conflict resolution. At the central government level he served the elite Special Protection Group (SPG), responsible for the security of the Prime Minister. During his stint at SPG he contributed towards nurturing SPG to be a world class security organisation famous for its "Zero Error" culture.















Future looks bright for terminals

Future bodes bright for the Indian container ports with container traffic on either coasts growing at a CAGR of 6 per cent during 2011-2016 period.

Positive demand in Europe and North America, reversal of fortunes in South American economies, improved economic environment in South Africa from the second half of 2016, as well as rising imports from China tethered the container traffic growth at Indian ports in 2016. India's container port throughput that grew by a paltry 2 per cent annually in 2015, registered an 11 per cent growth in 2016. Barring ports of Greater Mumbai where traffic was stagnant last year, the remaining regions recorded a double digit increase in throughput. While the container throughput at Indian ports grew at a CAGR of 13 per cent during the six years period from 2005 till 2010, it slowed to 6 per cent during 2011-2016. The decline was attributed to the global slowdown, following the economic recession of 2008.

Major vs non-major ports

The share of major ports in container handling has shrunk dramatically in the last ten years, while non-major ports, particularly in the upper west coast of India have grown by leaps and bounds. The market share of major ports declined from 92 per cent in 2005 to 63 per cent in 2016. The rapid expansion of private ports attracted a significant chunk of the traffic. The market share of non-major ports collectively surged to a whopping 37 per cent in 2016 from 3 per cent in 2005. On the east coast, Krishnapatnam and Kattupalli have amassed significant volume in three years (operational from 2013), adding to the growth story of non-major ports. In 2016, barring Pipavav that is on a weary footing with rumours of ownership change from APMT, the other four private ports registered humongous growth. Mundra handled 20 per cent additional boxes in 2016 over 2015 even as traffic at Hazira zoomed by 54 per cent during this period and a further 73 per cent boxes passed through the quay of Krishnapatnam in 2016. The rival Kattupalli port after its operational take over by Adani is mending its slow start. It handled about 3 lakh teu in 2016 from 31,000 in 2014.

East coast ports vs west coast ports

The west coast ports continue to dominate the container

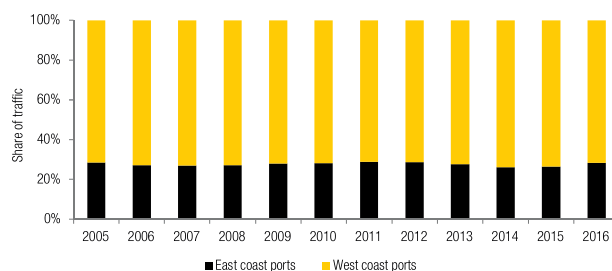


market in India and its share in the country's total container handling is hovering in the range of 70-75 per cent since 2001, while that of east coast ports is in the range of 25-30 per cent. The traffic at both coasts grew at a CAGR of 6 per cent during 2011-2016. However, the capacity growth on the east coast at a CAGR of 15 per cent from 2011 to 2016 is much higher than the 7 per cent growth on the west coast of India. Despite higher capacity expansion at east coast ports, their share in the total container movement was pegged at 28%. This also indicates that the inter-port competition is rife between ports on the same coast and in the same range and not between ports on different coasts.

On the west coast, competition is palpable between upper west coast ports in Gujarat and ports on the Greater Mumbai coast. The JNPT that had a share of 66 per cent in the west coast traffic back in 2010 slipped to 48 per cent by 2016. On the other hand, Mundra expanded its share from 18 per cent to 35 per cent during the same period. On the east coast, the tussle is between Chennai and ports few miles north of Chennai. Krishnapatnam and Kattupalli that started operations from 2013, currently hold a market share of 5 per cent and 8 per cent respectively in the east coast traffic, while Chennai's share plummeted from 52 per cent to 41 per cent.



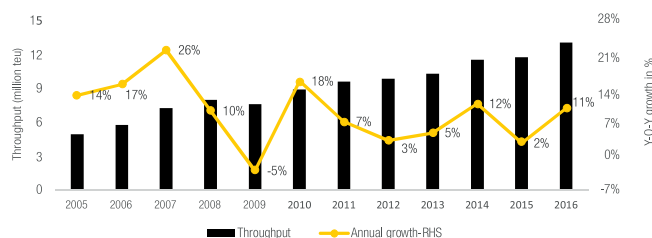
COASTAL SPLIT OF CONTAINER THROUGHPUT IN INDIA



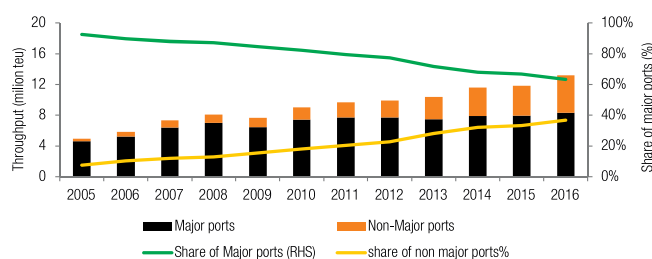
INDIA'S TRADE WITH EASTERN AND WESTERN COUNTRIES



CONTAINER HANDLING AT INDIAN PORTS



CONTAINER HANDLING AT MAJOR AND NON-MAJOR PORTS IN INDIA



India's trade with west and east

Trade with western countries continues to dominate India's export market with a share of 72 per cent of the country's total exports. The share remained unchanged during 2011-2016. However, imports from western countries are gradually declining and decreased from 59 per cent in 2011 to 51 per cent in 2016. On the other hand, inbound from eastern countries reached 49 per cent in 2016 from 41 per cent in 2011. India's exports to developing and emerging economies have been rising, while the pie is shrinking to advanced economies. Exports to the EU countries slide by 6 per cent during 2011-2016. Moreover, imports from 28 EU countries shrunk by 28 per cent during the same period. India's trade with South East Asia is on the rise. Exports to this region have increased by 12 per cent during 2011-2016.

If we analyse India's export basket, the country continues to rely on exports of primary goods and low-value, low-tech manufacturing goods. Agricultural products such as cotton, rice, tea, meat and spices continue to dominate the exports. A shift to exports of medium and high-tech manufacturing products such as engineering goods is visible; however, their share in the total export goods lags behind China and other emerging economies. [mg](#)

ERA of transformation

Indian container market is attracting huge investments for capacity building. Box business dynamics are rapidly transforming into new era that embrace advanced infrastructure, digitisation, innovative business practices, process automation and transparency.

As per Indian container market trend over the last few years, installed capacities and handled volume have been growing proportionately showing a positive sign for the industry apart from achieving best capacity utilisation levels of almost 65 per cent. Total Indian container terminals installed capacity and throughput have grown 11 per cent each respectively. Global and Indian operators are trying to attract transshipment cargo which could trigger inclusive growth in box trade. Few major and private players are also trying hard to establish themselves as transshipment hubs apart from serving as Gateway Port. This transformational change in box business is aiding Indian container market to reach the next level in Indian shipping business.

For the first time in Indian shipping industry, Gateway Media Pvt Ltd and Drewry have tried to analyse and present Indian container terminal market by operator. Global and Indian Operators are one of the key stakeholders of the industry, aiming high with their big ticket investments in India for the betterment of the industry in spite of industry headwinds. In this report, total Indian throughput is segregated by each operator as per their equity share in the terminal. Thus, could derive the exact picture of each operator share in Indian total throughput.

DP World India, APSEZ Ltd, APM Terminals India, JNPT, PSA International and MSC India Pvt Ltd contributed around 90 per cent of the throughput as per their equity share in Indian container terminals. The rest is shared among other players like JM Baxi, KPCL, CMA CGM Terminals, ABG Infra Logistics and Bolllore Africa Logistics.

DP World

DP world portfolio comprises of 78 marine and inland terminals along with around 50 related businesses in 40

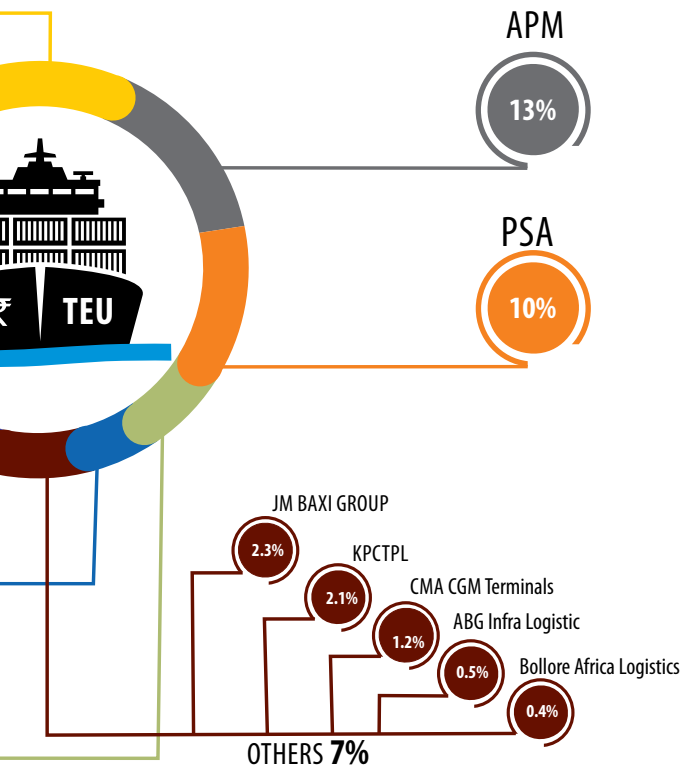
countries across six continents with a significant presence in both high-growth and mature markets. Container handling is the company's core business and generates more than three quarters of its revenue. In 2016, DP World handled around 64 million teu across its global portfolio. With its committed pipeline of developments and expansions, the current global gross capacity of 84.6 million teu is expected to rise to more than 100 million teu by 2020, in line with market demand.

Dubai government owned DP World is currently the biggest foreign port operator in India, reported 3.5 million teu as per their equity shareholding in Indian portfolio of terminals in FY 2016-17 while capturing 30 per cent share in Indian total throughput. DP world is running six container terminals in Indian ports in almost all biggest major container ports across Indian coast such as Mundra, Jawaharlal Nehru Port (two facilities), Cochin, Chennai and Visakhapatnam. One of the major contributor, Mundra International Container Terminal has registered a growth of 18 per cent year over year in FY 2016-17.

These six terminals have a combined market share of about 30 per cent of the 13.5 million teu handled by Indian ports during 2016-17. DP World is seeking opportunities in the country worth over \$1 billion in the next few years. This will be aimed at development of port infrastructure of the Sagarmala project, creation of the Delhi – Mumbai



INDIAN OPERATORS THROUGHPUT SHARE AS PER THEIR EQUITY IN FY 2016-17



Industrial Corridor, river transportation and cold chain storage, investing in port-led special economic zones, free trade zones, ICDs and cruise terminals.

APSEZ Ltd

APSEZ Ltd is the only major Indian operator among other operators in India with highest portfolio of owning and operating ports and terminals across Indian Coast. APSEZ has their presence in almost all coastal states of India. Almost around 30 per cent of Adani's portfolio is box business in its portfolio of diversified cargo types handled. In India, Adani is owning and operating 5 container terminals and 4 new terminals are in the anvil at Dhamra, Ennore, Mormugao along with one transshipment terminal at Vizhinjam. Adani total container terminals throughput by equity share is accounting around 20 per cent of the Indian total throughput, ranked 1st biggest Indian operator.

Joint venture of Terminal Investment Ltd (MSC) and APSEZ Ltd, Adani International Container Terminal handled 1,160,000 teu in FY 2016-17 with a year over year growth of 8 per cent, another joint venture facility of CMA CGM terminals and APSEZ Ltd is Adani CMA CGM Mundra Terminal registered one of the highest first year throughput of 276,630 teu and in contrary, Adani 100 per cent owned terminal has registered a negative growth of 9 per cent in the same period. Adani Kattupalli container Terminal has registered around 200 per cent growth and

Adani Hazira container terminal witnessed 37 per cent year over year growth in FY 2016-17.

APM Terminals

APM Terminal's is one of the largest container terminal operators in the world, offers the global shipping community an integrated Global Terminal Network of 56 ports and 154 inland facilities in 63 countries. With a presence in every major market, APM Terminals serves all major trade lanes providing wide clientele with the most advanced terminal technology, equipment and operations in the industry.

APM terminal's Indian portfolio consists of two terminals in India, currently - India's largest and most successful container terminal, APM Terminals Mumbai (earlier known as Gateway Terminals India), in JNPT at Nhava Sheva, Mumbai; and Port Pipavav in Gujarat. APM terminal's total installed capacity is 3.15 million teu where in total throughput share by equity holding is 1.61million teu in FY 2016-17.


APM terminals Mumbai and Pipavav clocked highest throughput in its history in the FY 2014-15 especially APM terminals Mumbai volume touched the highest ever handled by a single container terminal of 2.01 million teu in the Indian shipping industry, since after the two terminals fall a prey to the negative growth trend till this year. In addition, Global cyber-attack, ransomware hit the APM terminals operations across the globe that could further pull down the growth of the terminals in the current year. Notwithstanding to its downfall, still APM terminals Mumbai has registered a highest throughput handled by a single terminal in India of 1.7 million teus in FY 2016-17.

JNPT

Jawaharlal Nehru Port Trust owned and operated Jawaharlal Nehru Port Container Terminal has witnessed a positive year over year growth of 10 per cent in FY 2016-17. JNPT as an operator has contributed 13 per cent of throughput by equity share holding to the total volume handled in India. JNPT's transformational changes and adaptability to the new technology and enhancement of port infrastructure intensified the operations across its container terminal to record one of the highest throughput in India. Still many progressive plans are in progress for the betterment of the port and terminal to ease the congestion issues for the speedy evacuation of cargo apart from streamlining the operational processes.

PSA International

PSA International is eyeing to increase its dominance in Indian container market with slew of measures undertaken while adding new services and also with its high investments by adding further capacities across Indian coast. PSA's position in India will be beefed up further when Phase 1 of the Bharat Mumbai Container Terminal in Jawaharlal Nehru Port becomes operational in FY 2017-18.

In India, PSA achieved equity throughput of more than 1.15 million teu and garnered 5th position among other operators in India. In the last fiscal 2016-17, PSA's Chennai International Terminal clocked around 21 per cent of impressive growth rate year over year, while registering throughput of around 0.85 million teu in FY 2016-17. In addition, its Bharat Kolkata Container Terminal achieved an uptick of 10 per cent growth rate, and its Tuticorin Container Terminal witnessed 5per cent growth year over year with 0.53 million teu in FY 2016-17. 

Growth Drivers & Challenges

The future of container growth in India is bullish in the wake of various policy initiatives such as Make in India, GST, Digital India, new Foreign Trade Policy and port linked infrastructure projects. On the flip side, encouraging growth picture comes with several riders like fragmented port capacity, increased pressure on terminal assets from vessel upscaling and delay in the implementation of infrastructure projects



The global container traffic, according to Drewry's estimate is expected to grow by more than 5 per cent in 2017 and 3.5 per cent in 2018. The tide is turning in Latin America, particularly in Brazil that was in doldrums until the third quarter of 2016. The container traffic in North America and Europe is expected to grow by 3 per cent and 3.9 per cent respectively in 2017. The positive demand outlook globally will reflect on the box traffic in India.

New Foreign Trade Policy (FTP)

Under the new Foreign Trade Policy (2015 – 2020), India aims to increase its share in the global trade to 3.5 per cent by 2020. Incentives to agricultural exports and extension of the same under Merchandise Exports from India Scheme to units in SEZ are part of the new FTP. This is aimed to integrate with Make in India and Digital India initiatives.

Infrastructure projects linked to port

Some of the key projects that will be a game changer when fully operational are:

Multi-modal terminal under Jal Marg Vikas project:

The ₹170 crore multi-modal terminal at Varanasi that will open before December 2018, will connect North India to North East India. The government will also develop 35 MMLP.

Port based multi-product SEZ at JNPT

A port-based SEZ at JNPT will be developed with Free Trade Warehousing Zone, Engineering Goods sector, Electronics & Hardware sector and Pharma sector.

Dedicated Freight Corridor (DFC)

Two of the three DFCs are scheduled to be operational in the next three years. DFC will reduce the inland transit time significantly.

Sagarmala programme

Four hundred and fifteen projects have been identified for port modernisation, new port development, port connectivity enhancement and port linked industrialisation. Six new port locations have also been identified.

Proposed transshipment hubs in the south

The government has approved ₹27,000 crore port project at Enayam. The port is expected to become a gateway port for India by shifting boxes that are currently transhipped at Colombo, Singapore or Port Kelang. The location has a natural draft of 16 meters, and its proximity to East-West shipping route will enable it to be a transshipment hub for cargo from Bangladesh and Myanmar, which are currently being transhipped at Colombo.

The Vizhinam Port being developed by Adani enjoys a natural draft of more than 20 metres will also compete as a transshipment hub.

Challenges for container terminals

1. **Spatial distribution of ports:**
Fragmented container terminal capacity and development of new facilities in close vicinity will lead to traffic diversion. This will be a significant headwind to optimum utilisation of terminal facilities.
2. **Vessel upscaling:**
Increasing pressure on terminal assets from vessels upscaling will inflate the sunk cost for terminal operators as container handling equipment becomes obsolete and yard space becomes scarce. For instance, in March the government approved a project worth ₹2,029 crore for the widening and deepening the Mumbai harbour channel to enable large vessels to call at JNPT.
3. **Delay in policy implementation and project approvals:**

The best example to cite here is the Vizhinam port. The plan to develop this port was mooted way back in 1991 and it materialised after 24 years. Another example is the delay in the construction of the fourth container terminal at JNPT that has proved costly for the port, in terms of traffic diversion to the neighbouring ports. **WIB**

Liner connectivity in India

Upsizing of containerships has been a trend in the shipping industry to achieve economies of scale. However, the pace at which the vessel sizes are increasing in last decade is unforeseen.

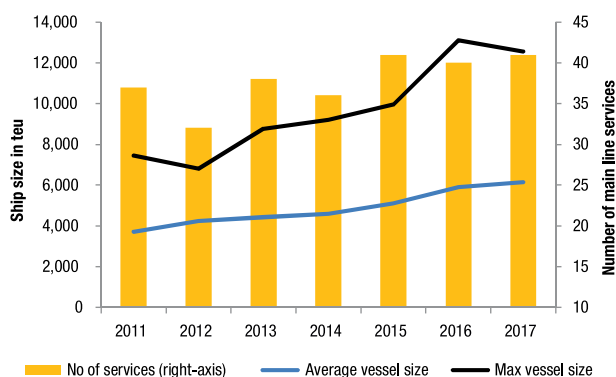


Upsizing of containerships has been a trend in the shipping industry to achieve economies of scale. However, the pace at which the vessel sizes are increasing in last decade is unforeseen. In global container fleet today, we can see more than 50 ships with capacity exceeding 18,000 teu. Although ordering of new ships has taken a pause, rumours of CMA CGM and MSC ordering 22,000 teu vessels might be a reality soon. However, economies of scale from carriers' perspective does not always hold true from the terminal operators' perspective. To accommodate large ships, the ports need to continually upgrade their handling infrastructure apart from increasing the efficiency and productivity to remain competitive.

Being situated on a major trade lane (Asia-Europe), Indian ports cannot remain aloof from the emerging trends in global container shipping. The largest vessels delivered out of shipyards mostly find their home on this route due to the geoeconomic dynamics. Therefore, the average ship size in 2011 on Asia-Europe route was 9,400 teu which increased to 14,700 in 2017, about 60 per cent increase in cargo carrying capacity per vessel on an average. Similar is the case for Indian ports. The average size of container ships handled by Indian ports increased from 3,700 teu to 6,100 teu in 2017. Similarly, the largest ship size also rose to 12,500 teu from 7,400 teu.

India's biggest major port Jawaharlal Nehru Port is also going through major expansions and enhancements to accommodate the bigger size vessels. Maintenance, dredging of the Port channel and basin has been carried out in the recent past in order to serve the trade with better infrastructure ready in place. During 23rd and 24th April 2016, JN Port handled the biggest vessel of 13,371 TEUs capacity, MSC Fabiola of 366 meters' length at its private terminal Nhava Sheva (India) Gateway Terminal (NSIGT) operated by DP World. Vessel MSC Sola with deepest draft ever of 15.2 meters also being handled at port. JNPT SEZ has acquired all regulatory compliances to cater to bigger

INCREASING VESSEL SIZE AT INDIAN PORTS




HIGHLIGHTS

The average ship size in 2011 on Asia-Europe route was 9,400 teu which increased to 14,700 teu in 2017, about 60 per cent average increase in cargo carrying capacity per vessel.

Among Indian ports, the average size of container ships handled by Indian ports increased from 3,700 teu to 6,100 teu in 2017.

The largest ship size in India also rose to 12,500 teu from 7,400 teu.

Investments are spiked up by most of the major and private operators to deepen the draft of their respective container terminals in order to serve the trade while handling largest container ships on Indian coast.

vessels, In March 2017, the Port has also awarded tender for increasing draft. The dredging project being completed at a cost of Rs 209 crore will place JNPT in the league of deeper ports and ensure scale economies to its EXIM trade. The project includes the existing channel to be widened to 450 metres from the current 370 metres, and the straight reach channel to be extended to 35.5 kms, from the existing 33.5 kms. The draft of the channel will be increased to 15 metre, from the current 14 metre. The estimated quantity to be dredged is to the tune of 35.03 million cubic metre, including 1.73 million cubic metre rock dredging. JN Port is repeatedly achieving several milestones in terms of vessel size to facilitate faster turnaround and reinforce JN Port's position as one of the leading container Ports in the Country. 

TERMINALS RANKING

(FY 2016-17)

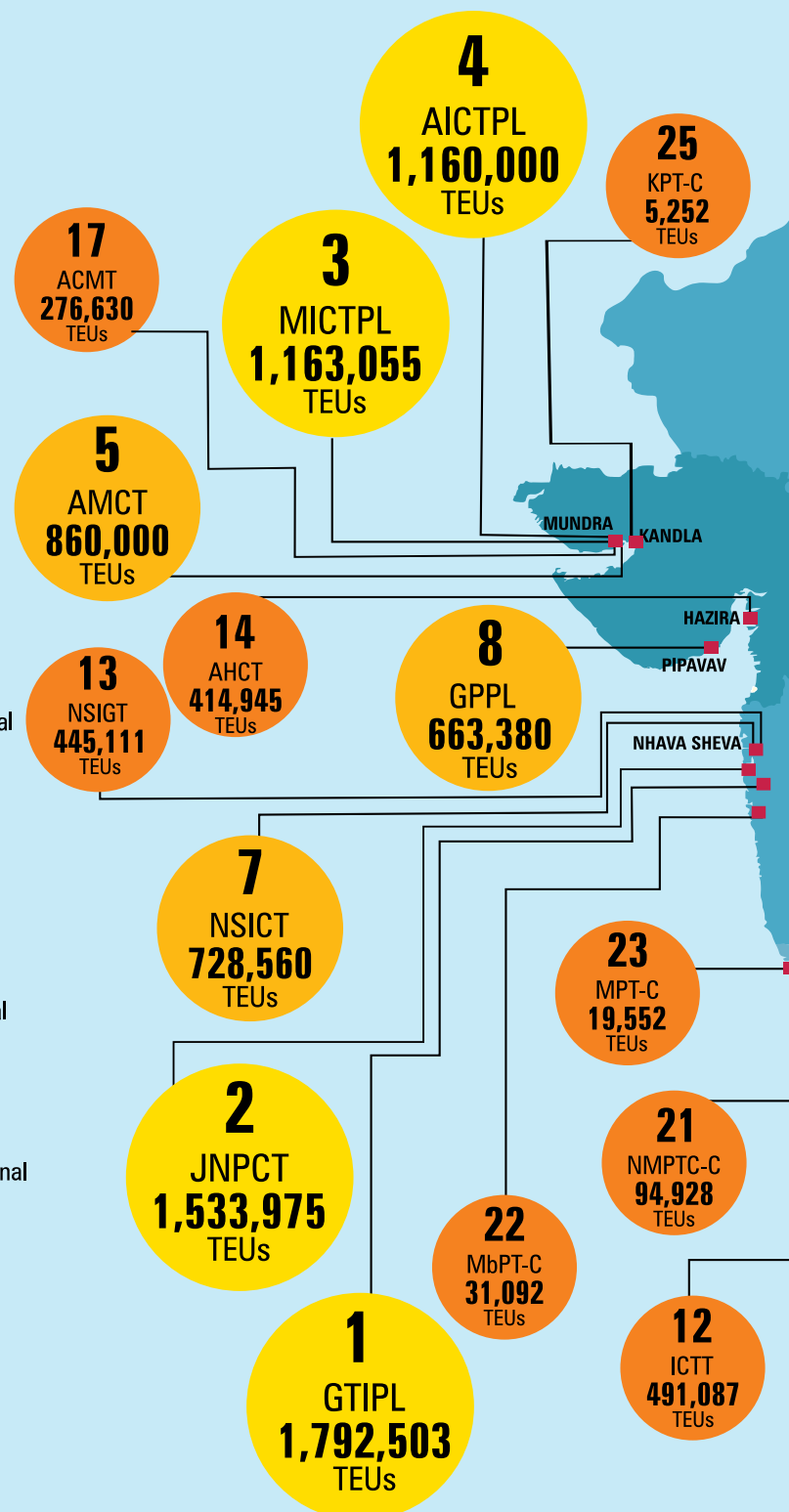
Total Installed Capacity
(FY 2016-17)

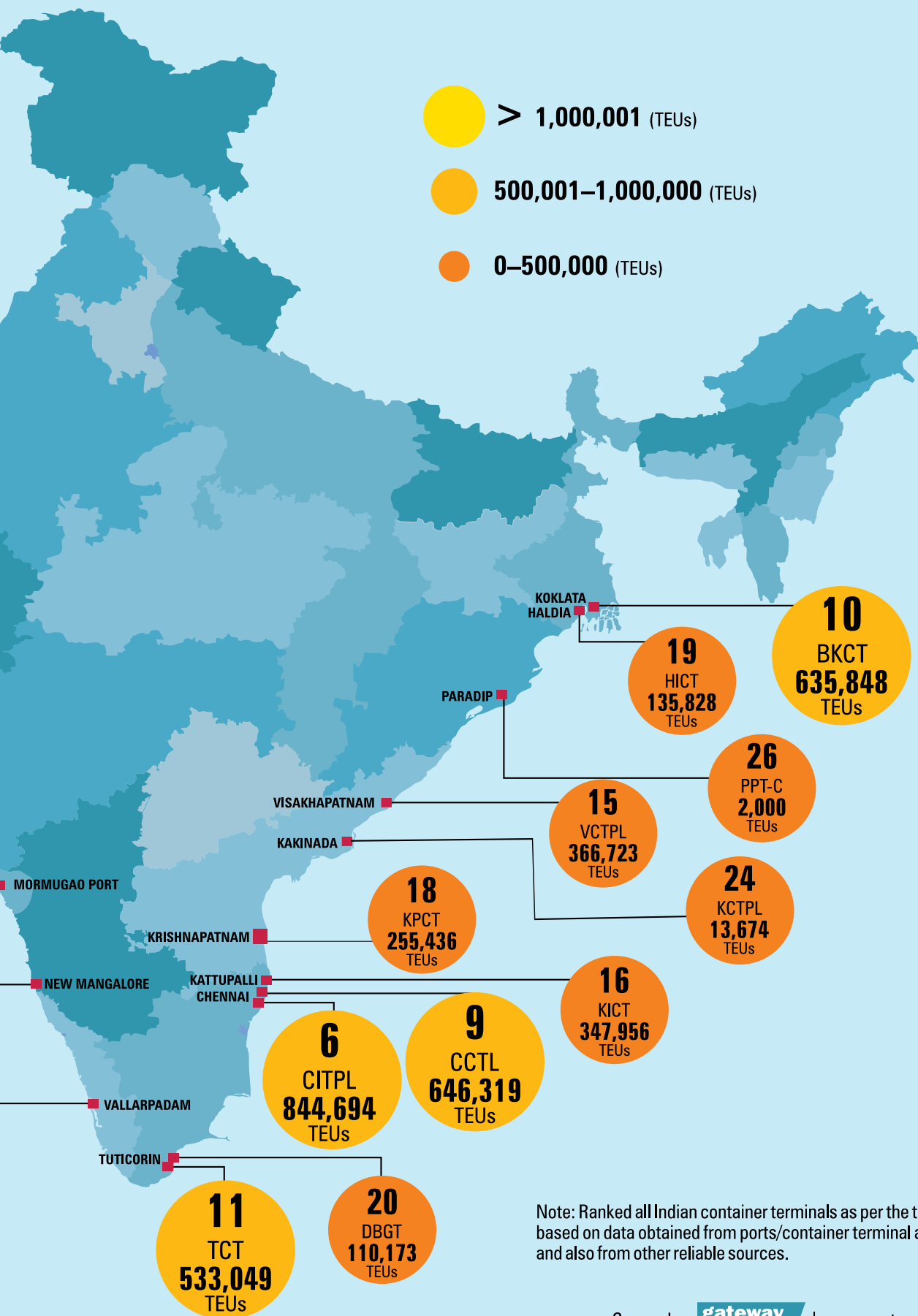
21,000,000 TEUs

Total Throughput
(FY 2016-17)

13,710,622 TEUs

GTIPL	: APM Terminals Mumbai
JNPCT	: Jawaharlal Nehru Port Container Terminal(Including Shallow berth)
MICTPL	: Mundra International Container Terminal
AICTPL	: Adani International Container Terminal
AMCT	: Adani Mundra Container Terminal
CITPL	: Chennai International Terminal
NSICT	: Nhava Sheva International Container Terminal
GPPL	: APM Terminals Pipavav
CCTL	: Chennai Container Terminal
BKCT	: Bharat Kolkata Container Terminal
TCT	: PSA SICAL Tuticorin Container Terminal
ICTT	: Vallarpadam ICTT
NSIGT	: Nhava Sheva India Gateway Terminal
AHCT	: Adani Hazira Container terminal
VCTPL	: Visakha Container Terminal
KICTPL	: Kattupalli International Container Terminal
ACMT	: Adani CMA Mundra Terminal
KPCT	: Krishnapatnam Port Container Terminal
HICT	: Haldia International Container Terminal
DBGT	: Dakshin Bharat Gateway Terminal
NMPT-C	: New Mangalore Port - (Containers)
MbPT-C	: Mumbai Port - Containers
MPT-C	: Mormugao Port -Containers
KCTPL	: Kakinada Container Terminal
KPT-C	: Kandla Port - Containers
PPT-C	: Paradip Port - Containers





Note: Ranked all Indian container terminals as per the throughput based on data obtained from ports/container terminal authorities and also from other reliable sources.

I N D I A N C O N T A I N E R

Container Terminal Name	Known as (Short Name)	Operator	Year of Commission	Draft (m)	Berths	Quay Length (m)	Installed Capacity (TEUs)
APM Terminals Pipavav - Gujarat Pipavav Port Ltd	GPPL	APM Terminals Pipavav - Operating since 2005	2002	15.5	2	735	1,350,000
Mundra International Container Terminal	MICTPL	DP World	2003	14.5	2	632	1,100,000
Adani Mundra Container Terminal	AMCT	Adani Ports & SEZ Ltd	2007	14.5	2	631	1,250,000
Adani International Container Terminal	AICTPL	Adani Ports & SEZ Ltd and MSC Mediterranean Shipping Company	2012	16.0	2	810	1,500,000
Adani Hazira Container terminal	AHCT	Adani Hazira Port Pvt Ltd	2012	13.0	2	637	1,000,000
Chennai Container Terminal	CCTL	DP World	2001	15.0	4	885	850,000
PSA - Chennai International Terminal	CITPL	PSA Chennai	2009	15.5	3	832	1,500,000
Visakha Container Terminal	VCTPL	United Liner Agencies of India Pvt Ltd and DP World.	2003	16.5	2	450	700,000
Krishnapatnam Port Container Terminal	KPCT	Krishnapatnam Port Container Pvt Ltd	2012	16.0	2	650	1,200,000
Kattupalli International Container Terminal	KICT	Adani Ports & SEZ Ltd	2013	13.5	2	710	1,200,000
Jawaharlal Nehru Port Container Terminal & Shallow Drought Terminal	JNPCT	Jawaharlal Nehru Port Trust	1989	14.0	3	680 & 445	1,400,000
Nhava Sheva International Container Terminal	NSICT	DP World	1999	13.5	2	600	1,500,000
Nhava Sheva India Gateway Terminal	NSIGT	DP World	2015	13.5	1	330	800,000
APM Terminals Mumbai - Gateway Terminals India	GTIPL	APM Terminals and Container Corporation of India	2006	14.0	2	712	1,800,000
Bharat Kolkata Container Terminal	BKCT	PSA provides container handling services (O&M) since 2014-KoPT	1979	8.5	5	812	850,000
Haldia International Container Terminal	HICT	United Liner Agencies of India Pvt Ltd operating since 2015	1977	8.5	2	432	300,000
Vallarpadam International Container Transhipment Terminal	ICTT	DP World	2011	14.5	2	605	1,000,000
PSA - SICAL Tuticorin Container Terminal	TCT	Sical and PSA International	1999	10.9	1	370	450,000
Dakshin Bharat Gateway Terminal	DBGT	Dakshin Bharat Gateway Terminal Pvt Ltd	2014	12.8	1	345	500,000
New Mangalore Port - (Containers)	-	New Mangalore Port Trust	NA	NA	NA	NA	NA
Adani CMA Mundra Terminal	ACMTPL	Adani Ports and Special Economic Zone Ltd (APSEZ) and CMA CGM SA	2017	16.5	2	650	1,300,000
Mormugao Port -Containers	-	Mormugao Port Trust	NA	13.1	1	250	NA
PSA Kakinada Container Terminal	KCTPL	Bothra Shipping, Kakinada Infrastructure Holdings and PSA Chennai	2016	13.0	1	300	100,000

NER TERMINALS

Yard Area (Hectares)	Throughput	Total Ground Slots (TGS)	Reefer Plugs	Quay Cranes	Rubber Tyred Gantry Cranes (RTGC)	Rail Mounted Gantry Cranes (RMGC)	Reach Stackers	Fork Lifts	Capacity Utilization (%)
16.0	6,63,380	3,409	526	3 Panamax and 5 Post Panamax	18	4	9		49.14
22.5	11,63,055	5,400	332	2 Post Panamax and 4 Super Post Panamax	18	2	2	4	105.73
16.7	8,60,000	4,014	366	6 Super Post Panamax	20	NA	3	NA	86.00
32.8	11,60,000	10,000	405	6 Super Post Panamax	18	NA	3	NA	66.29
15.5	414,945	3,381	120	4 Post Panamax and 2 Super Post Panamax	16	NA	2	NA	41.49
17.6	646,319	3,960	300	7 Super Post Panamax	23	3	1	1	53.86
35.0	844,694	5,424	306	3 Post Panamx and 4 Super Post Panamax	18	NIL	6	NA	67.58
16.4	366,723	2,500	204	2 Panamax and 2 Post Panamax	6	0	7	3	52.39
36.0	255,436	4,600	400	5 Super Post Panamax	4	NIL	10	2	21.29
24.5	347,956	5,120	360	6 Super Post Panamax	15	NIL	3	4	29.00
61.5 & 9.9	1,533,975	10,482	390	9 Super Post Panamax & 3 Post Panamax	18	5	10	3	102.27
25.8	728,560	6,222	778	6 Post Panamax and 2 Super Post Panamax	29	3	3	2	60.71
20.0	445,111	NA	NA	4	12	NA	NA	NA	55.64
52.0	1,792,503	9,723	880	10 Post Panamax	40	3	2	6	99.58
13.3	635,848	3,000	NA	Mobile Harbour	NA	NA	9	NA	74.81
9.0	135,828	3,000	8	2 Panamax	4	NIL	2	NIL	54.33
12.0	491,087	2,500	450	4 Super Post Panamax	15	NA	3	NA	49.11
4.0	533,049	1,000	84	3 Post Panamax	8	NA	2	1	118.46
6.5	110,073	400	NA	2 Mobile Harbour	NA	NA	2	NA	18.36
NA	94,928	NA	150	Mobile Harbour	NA	NA	3	NA	NA
28.0	276,630	6,500	400	4 Super Post Panamax	12	NA	NA	NA	34.58
1.50	19,552	8	84	2 Mobile Harbour	NA	NA	2	NA	NA
5.0	13,674	400	90	2 Mobile Harbour	NA	NA	2	NA	13.67



PERFORMANCE OF INDIAN CONTAINER TERMINALS (FY 2016-17)

Names	Volume Handled	Annual Growth
APM Terminals Pipavav	Medium	Low
Mundra International Container Terminal	High	High
Adani Mundra Container Terminal	Medium	Low
Adani International Container Terminal	High	Medium
Adani Hazira Container Terminal	Low	High
Paradip Container Terminal	Low	Low
Chennai Container Terminal	Medium	Low
PSA Chennai International Terminal	Medium	High
Visakha Container Terminal	Low	High
Krishnapatnam Port Container Terminal	Low	High
Kattupalli International Container Terminal India	Low	High
Jawaharlal Nehru Port Container Terminal	High	Medium
Nhava Sheva International Container Terminal	Medium	Low
Nhava Sheva (India) Gateway Terminal	Low	High
APM Terminals Mumbai	High	Low
Bharat Kolkata Container Terminal	Medium	Medium
Haldia International Container Terminal	Low	High
Vallarpadam ICTT	Low	High
Mumbai Port - Containers	Low	Low
PSA SICAL Tuticorin Container Terminal	Medium	Low
Dakshin Bharat Gateway Terminal	Low	Medium
New Mangalore Port - Containers	Low	High
Mormugao Port - Containers	Low	High
Kakinada Container Terminal	Low	High

Reference	Low	Medium	High
Volume(Mi TEUs)*	0-0.5	0.5-1	>1
Annual Growth	<5%	5-10%	10%+

* Mi TEUs - Million Twenty Foot
Equivalent Units

Minimise Your Cost

Optimise Your Efficiency



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- Closed-loop conveying, protect your cargo
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The CMA CGM logo, featuring the company name in a bold, sans-serif font, flanked by two curved lines that suggest a stylized 'C' or a ship's hull.

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