



India Consolidates Global Lead in Green Ship Recycling

THE FAST TRACK TO THE SEA

Western Dedicated Freight Corridor:
The 1,506-km line that is redrawing India's port and logistics map

INTERVIEWS

- Indranath Bose**
Advisor, GE Shipping
- Alok Mishra**
Chief Executive Officer – Ports & Terminals,
DP World, Mundra
- Prediman Koul**
Chief Executive Officer, Jeena & Company
- Shivkumar Rao**
Founder Director, R&Y Logistics
- Chris Goldsworthy**
Chief Executive, IMarEST
- Fabiano Piccinno**
Global Head of Sustainability Air Logistics,
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EDITOR'S NOTE

Container Shipping's Capacity Trap: Why More Ships Are Not the Answer

Global container shipping enters the second half of 2026 caught between two conflicting realities. Demand is growing, but not fast enough. Capacity is expanding, but not evenly. And the industry's usual escape valve, rerouting around geopolitical flashpoints, has become a permanent cost rather than a temporary inconvenience.

BIMCO's own numbers tell the story. Global trade volumes are expected to grow between 2.5 and 3.5 percent this year, a respectable figure in isolation. But it is nowhere near enough to absorb the wave of new tonnage entering the water. US ocean imports, meanwhile, are projected to contract by roughly 2 percent as tariff costs filter through to importer decisions and consumer demand softens. The result is a market where growth and overcapacity are advancing on parallel tracks, with rates caught in the middle, leaving carriers little room to plan with confidence.

The orderbook problem carriers cannot unsee

Clarksons Securities places the containership orderbook-to-fleet ratio at 31.6 percent, up from 27.5 percent in 2023. That is not a temporary bulge. Deliveries are expected to ease slightly to 1.7 million TEU in 2026, offering carriers a brief reprieve, before surging to 2.8 million TEU in 2027 and 3.5 million TEU in 2028. Owners who ordered aggressively during the post-pandemic boom are now committed to a supply cycle that outpaces demand for years, regardless of what happens on any single trade lane. Even a sharp rebound would struggle to absorb tonnage at this pace.

Rerouting has become the new baseline, not the exception

Layered on top of this is the operational reality of the Cape of Good Hope diversion, still the default routing for most Asia-Europe services. That detour adds



10 to 14 days of transit time and a 25 to 30 percent premium on FAK rates compared with pre-disruption levels. Schedule reliability on major east-west lanes remains below 60 percent. Carriers, forwarders and shippers alike have stopped planning for a return to 2019-style routing and have started building the Cape diversion into standard cost models instead, treating the longer, costlier route as permanent rather than a temporary workaround.

For India's exporters and logistics planners, the message is clear. Rate volatility, extended transit windows and unpredictable schedules are not a passing phase to wait out. They are the operating environment for the foreseeable future, and procurement, contracting and inventory strategies need to be built accordingly, with longer lead times and more flexible contracts becoming essential rather than optional.

R Ramprasad

Editor & Publisher
ramprasad@maritimegateway.com



Editor & Publisher

R Ramprasad, ramprasad@maritimegateway.com

Assistant Editor

Kalpna, kalpana@maritimegateway.com

Design Team

Bheemaiiah, bheemaiiah@maritimegateway.com

Kushith, kushith@maritimegateway.com

Marketing & Sales

Satish Shetti, satish@maritimegateway.com, +91 99207 05534

Nikhil Doshi, nikhil@maritimegateway.com, +91 98369 96293

Client Relations & Subscription

Rahul, rahul@maritimegateway.com, +91 85200 858201

Digital Strategy

Harsha, harsha@maritimegateway.com

Digital Marketing

Sanskriti, sanskriti@maritimegateway.com

Mukul, mukul@maritimegateway.com

HR & Events

Mayuri, mayuri@maritimegateway.com

IT & Administration

Kishore, kishore@maritimegateway.com

PR & Communications

Madhukar, madhukar@maritimegateway.com, +91 93937 68383

Finance

Rakesh, rakesh@maritimegateway.com

EDITORIAL ADVISORY BOARD

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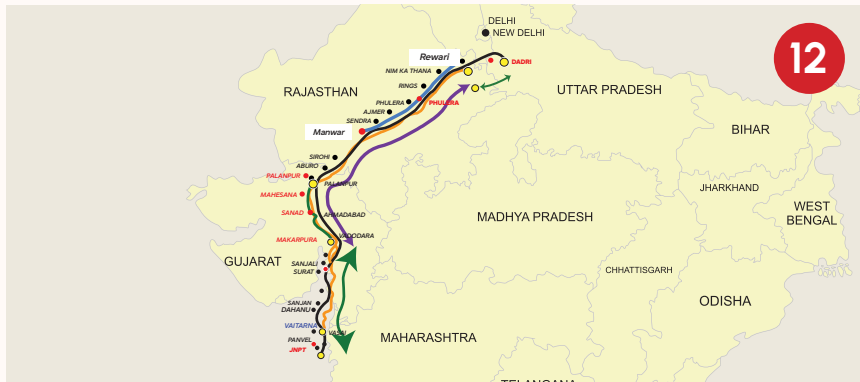
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ATMANIRBHAR BHARAT IN ACTION:-

- * Export cargo movement in CONCOR's own containers with in-house BL
- * South East Asia & Middle East connected — global expansion underway
- * Perishable cargo exports in CONCOR's reefer containers



Accelerated Movement on Dedicated Freight Corridor



67 terminals Including 16 MMLPs setup across the country



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Bulk Cement Movement enters new era with CONCOR



Cold chain Logistics: Ensuring Freshness



ESG Sustainable Green Logistics: LNG Trucks, LNG Fuel stations & More



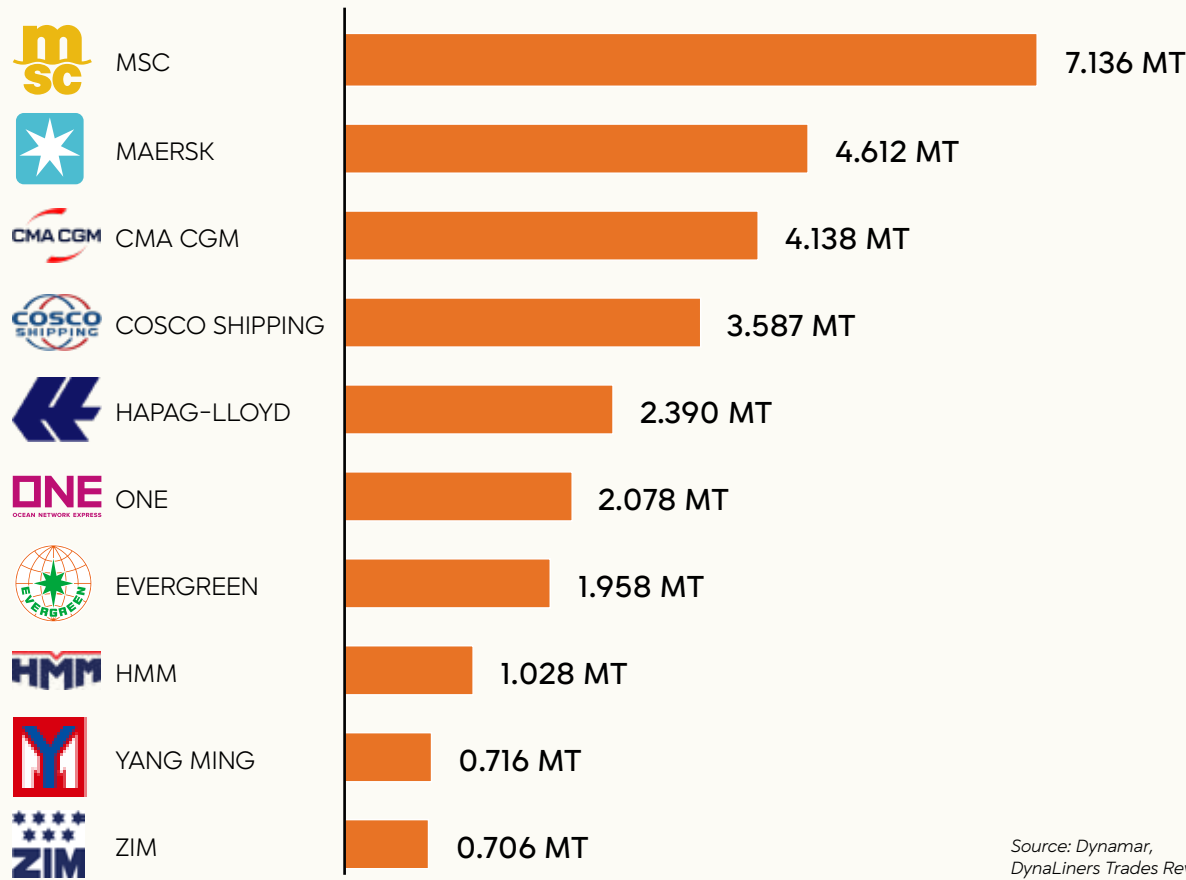
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MAJOR CONTAINER SHIPPING ALLIANCES (2026)
Comparison of the world's three major container shipping alliances

	GEMINI COOPERATION		OCEAN ALLIANCE		PREMIER ALLIANCE	
PARTNERS	Maersk		CMA CGM		HMM	
	Hapag-Lloyd		COSCO Shipping / OOCL		ONE	
			Evergreen		Yang Ming	
NETWORK	275 SHIPS	3.5m TEU	350 SHIPS	5.0m TEU	220 SHIPS	2.75m TEU
STRATEGY	Integrated hub-and-spoke network		Largest alliance by deployed capacity		Successor to THE Alliance	
	Dedicated regional shuttles		Traditional alliance structure		Coordinated vessel sharing	
	Relay & feeder operations		Broad global service network		Core East-West services	

TOP 10 CONTAINER CARRIERS BY FLEET CAPACITY (2025)



Source: Dynamar,
DynaLiners Trades Review 2026



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LARGEST
CONTAINER
PORT



JAWAHARLAL NEHRU PORT AUTHORITY

A FUTURE READY PORT

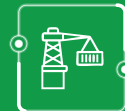
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Handles more than
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among India's Major Ports



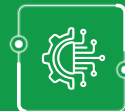
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Landlord Port



Five Container Terminals
with a deep draft
of 15+ metres



Focused on 'Ease of Doing
Business' through tech
and infrastructure



Home to a dedicated
SEZ driving
export-ready growth



JNPA achieved more than
60% of green renewable energy
share in 2025



Contributes 21% of
India's total customs
revenue

DEALS *Roundup*

A month of bold moves across ports, energy and infrastructure.

From Kamarajar Port's ₹440-crore dredging breakthrough to Adani Ports' \$1.4-billion Vizhinjam stake sale, this edition tracks the deals reshaping India's maritime and energy landscape, alongside key developments from ADNOC, BPCL, Indian Oil and beyond.

Kamarajar Port becomes India's second major port with 18-metre draft

Kamarajar Port Limited has become India's second major port, after Visakhapatnam, to achieve an 18-metre operational draft following the completion of its ₹440 crore Capital Dredging Phase VI project. The upgrade involved deepening the outer approach channel from 20 metres to 23 metres, the inner entrance channel from 19 metres to 22 metres, and berth pockets to support larger vessels. The enhanced draft enables the port to handle fully laden Capesize bulk carriers of up to 170,000 deadweight tonnage (DWT), improving cargo-handling efficiency and reducing logistics costs. The development is expected to strengthen India's maritime competitiveness, support growing export-import (EXIM) trade, and align with the government's Maritime India Vision 2030 and Maritime Amrit Kaal Vision 2047 to build world-class port infrastructure.



ADNOC expands energy partnership with South Korea

ADNOC has signed a Strategic Collaboration Agreement (SCA) with South Korea's Ministry of Trade, Industry and Resources (MOTIE) to strengthen long-term energy cooperation, including crude oil supply, emergency response coordination and strategic storage. The agreement provides for the supply of up to 24 million barrels of UAE crude oil to South Korea while expanding collaboration on strategic stockpiling and ensuring ADNOC's continued access to crude storage facilities, including the Yeosu terminal. The partnership aims to enhance South Korea's energy security by improving supply resilience, strengthening emergency preparedness and supporting alternative export routes to mitigate geopolitical risks. Building on more than four decades of energy ties, the agreement reinforces ADNOC's position as a key long-term crude supplier to South Korea and opens opportunities for deeper cooperation in the oil, gas, petrochemical and broader energy sectors.

BPCL to buy Videocon Energy's stake in BPRL Ventures JV

Bharat Petroleum Corporation Limited has signed definitive agreements to acquire the entire stake held by Videocon Energy Brazil Limited in IBV Brasil Petroleo Limitada, a joint venture operated through its upstream arm, BPRL Ventures. Following the acquisition, BPCL's subsidiary will increase its ownership from 65.4% to 100%, making IBV a wholly owned subsidiary. The transaction, completed through BPCL's right of first refusal under the shareholders' agreement, is aimed at consolidating the company's overseas upstream portfolio and strengthening India's long-term energy security. The acquisition is expected to enhance BPCL's control over strategic oil and gas assets in Brazil, improve operational flexibility, and support its strategy of expanding international exploration and production activities.



Adani Ports to sell 49% stake in Indian port to MSC for \$1.4 billion

Adani Ports and Special Economic Zone Limited has agreed to sell a 49% stake in Adani Vizhinjam Port Private Limited to Terminal Investment Limited for \$1.4 billion, valuing the Kerala port at \$2.85 billion. The transaction marks one of the largest foreign private investments in India's port sector and strengthens the long-standing partnership between Adani Ports and the Mediterranean Shipping Company (MSC) Group. The investment will support the expansion of Vizhinjam International Seaport, India's first deep-water container transshipment port, with planned capacity increasing from 1.6 million TEUs to 5.7 million TEUs by 2028. The deal is expected to enhance India's transshipment capabilities, improve global trade connectivity, and boost cargo handling efficiency, subject to regulatory approvals.



Gujarat Announces ₹50 Crore Shipbuilding Subsidy Incentive

The Gujarat government has unveiled a new Shipbuilding and Repair Policy that offers a top-up subsidy of up to ₹50 crore in addition to the Centre's Shipbuilding Financial Assistance Scheme, aiming to strengthen the state's competitiveness in global shipbuilding. Shipyards in Gujarat will receive up to 8% financial support (or ₹50 crore) for small and large vessels, and up to 10% (or ₹50 crore) for specialised vessels such as LNG carriers, offshore platforms and green-fuel ships. The policy, initially valid for five years and extendable by another five, seeks to reduce cost disadvantages against major shipbuilding nations like China, South Korea and Japan.

Indian Oil Corporation Ltd Announces Acquisition of 40% Stake

Indian Oil Corporation Limited has announced the acquisition of a 40% stake in Tiki Tar Industries and Shell India Markets Pvt. Ltd. for ₹85 crore, strengthening its presence in the bitumen and road construction materials segment. The acquisition is aimed at expanding Indian Oil's value-added product portfolio and enhancing its capabilities in manufacturing and marketing bitumen-based products used in road infrastructure. By partnering with established players, the company expects to improve product innovation, strengthen supply chains and cater to the growing demand driven by India's expanding highway and infrastructure projects.

China to develop Mongla port economic zone in site delisted for India

Bangladesh has approved the development of an economic zone near Mongla Port by a Chinese company on land that was originally allocated for an Indian-backed economic zone. The site was delisted under the Muhammad Yunus-led interim administration amid worsening India-Bangladesh relations. The move marks a significant shift in Bangladesh's investment strategy, with China strengthening its presence in the country's infrastructure and industrial sectors. Located near one of Bangladesh's key seaports, the economic zone is expected to boost manufacturing, trade and logistics while attracting foreign investment. The decision also highlights evolving geopolitical dynamics in South Asia, as China expands its economic footprint in Bangladesh while India's planned project has been set aside.

₹8,300-crore Rameshwar-Paradeep Coastal Highway to boost Odisha's economy

The Ministry of Road Transport and Highways (MoRTH) will develop the 160.18-km Rameshwar-Paradeep Coastal Highway in Odisha at an estimated cost of ₹8,300.79 crore to improve connectivity, tourism and economic growth. Passing through Khurda, Puri, Kendrapada and Jagatsinghpur districts, the project includes a four-lane access-controlled stretch from Rameshwar to Konark and a two-lane highway with paved shoulders from Konark to Paradeep, reducing travel time by around 2.5 hours. The corridor will strengthen access to major pilgrimage sites such as the Jagannath Temple, Konark Sun Temple and Ramchandi Temple, while promoting coastal, beach and eco-tourism. Developed under the PM GatiShakti initiative, it will connect key economic and logistics nodes, improve access to Paradip Port, Puri Railway Station and the upcoming Puri Airport, and create new opportunities for tourism-related businesses and local livelihoods.





SETTING NEW BENCHMARKS IN FERTILISER CARGO HANDLING

Ashapura Shipping Group, headquartered at Deendayal Port Authority, has spent over two decades building a reputation as one of Western India's leading integrated maritime logistics enterprises. The company recently added a new chapter to that record by setting a fresh benchmark in fertilizer cargo handling, barely months after entering the segment.

Operating through six specialised business units, Ashapura Shipping Group offers end-to-end logistics services covering stevedoring, customs clearance, transportation, warehousing, chartering, and vessel operations. The company has handled over 7 million metric tonnes of dry bulk cargo at Deendayal Port Authority to date, supported by a fleet of more than 200 owned cargo handling equipment and

transport assets. Its client base spans exporters, importers, vessel owners, charterers, and global trading houses dealing in coal, salt, aggregates, bentonite, mill scale, gypsum, iron ore, and fertilisers.

The company's latest achievement came with its expansion into Granulated Single Super Phosphate (GSSP) cargo. During the loading of M.V. HSL Yokohama, Ashapura Shipping Group loaded 36,390 metric tonnes of GSSP in 23 hours and 5 minutes, marking the highest quantity of GSSP handled within 24 hours at Deendayal Port Authority. The performance surpassed the previous record of 26,336 metric tonnes and was officially certified by the port authority, which also congratulated the team involved. The operation was executed jointly by **Shree Ashapura Stevedores** and

Shri Balaji Infraport Pvt. Ltd., both units of the Ashapura Shipping Group, working alongside exporter Transworld Furtichem Ltd. Company officials described the record as the result of careful planning and coordination among all parties involved, rather than a one-off achievement.

Ashapura Shipping Group has built similar productivity benchmarks over the years in handling coal, salt, aggregates, mill scale, and bentonite at Deendayal Port Authority, earning recognition from the port authority and coverage across maritime trade publications. Company leadership attributes this consistency to a customer-first approach, with dedicated planning for every shipment and vessel. Established in 2005, the Group today comprises Shree Ashapura Stevedores, Shri Balaji Infraport

Pvt. Ltd., Imperial Chartering & Ancillary Services Pvt. Ltd., Imperial Chartering IFSC Pvt. Ltd. in GIFT City, Imperial Chartering Singapore Pte. Ltd., and Shree Ashapura Fuel Station. Together, these entities offer services including rake loading, barge operations, mid-sea discharge, and comprehensive port logistics support.

With India's maritime and logistics sector expanding rapidly, Ashapura Shipping Group says it plans to continue investing in infrastructure and diversifying into new cargo segments. The company's recent entry into fertiliser logistics, capped by an immediate port record, reflects what officials describe as a long-standing philosophy at the Group: to not just handle cargo, but to set new benchmarks in every segment it enters.

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THE FASTTRACK TO THE SEA

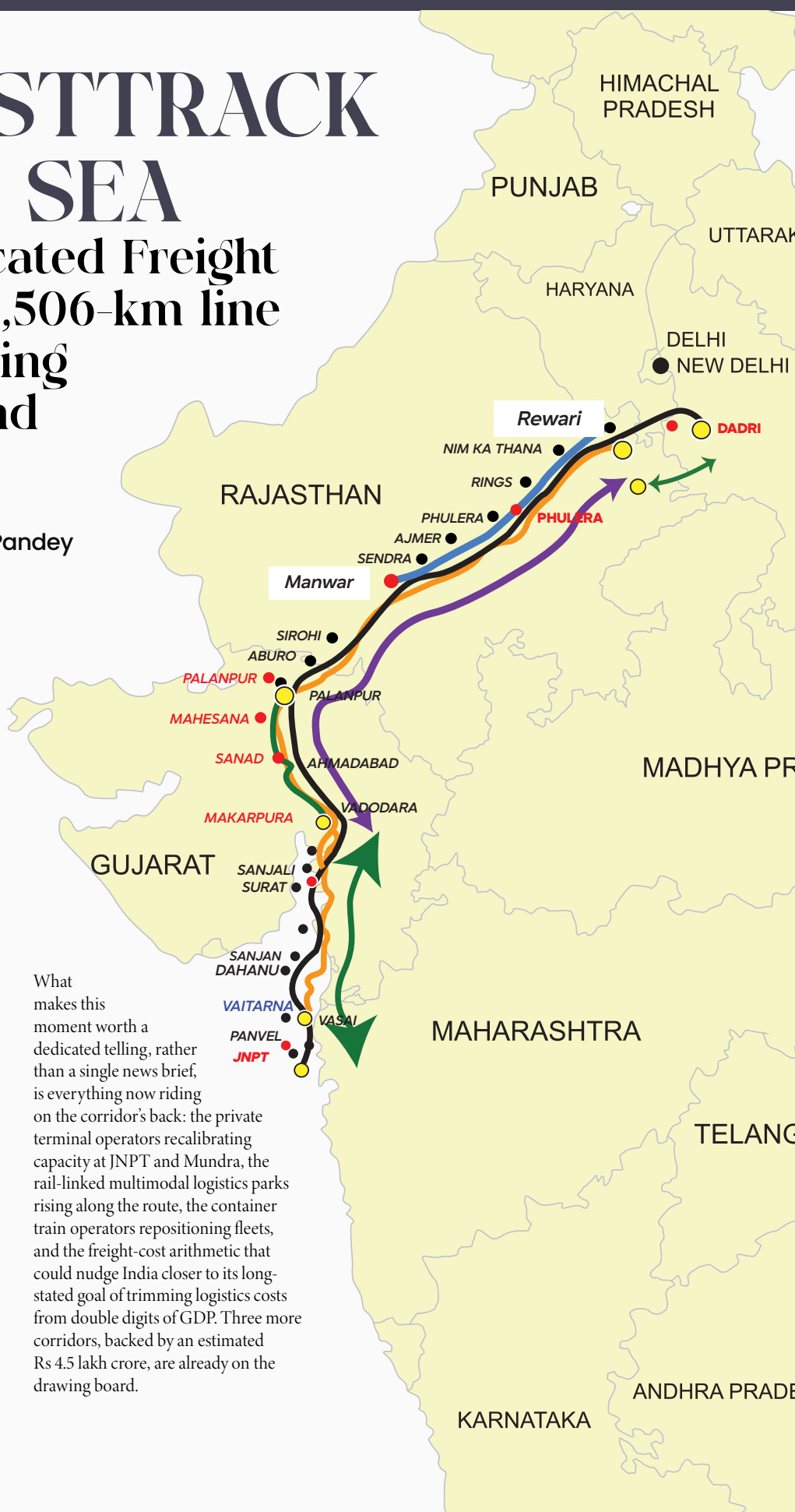
Western Dedicated Freight Corridor: the 1,506-km line that is redrawing India's port and logistics map

Ramprasad Ravi & Kalpana Pandey

On March 31, 2026, a container train rolled out of Jawaharlal Nehru Port on the outskirts of Mumbai, crossed the newly commissioned stretch to New Saphale, and closed a loop that India's planners had been chasing for two decades. With that trial run, the Western Dedicated Freight Corridor (WDFC) — 1,506 km of double-stacked, double-electrified track running from JNPT to Dadri in Uttar Pradesh via Gujarat, Rajasthan and Haryana — stood fully operational. For an industry that measures its fortunes in turnaround time and rupees per tonne-km, this is not incremental change. It is a reset.

The numbers explain why. Freight trains on the WDFC can run at over 100 km/h, stretch to 1,500 metres, and carry up to 400 containers in a single haul — volumes and speeds ordinary Indian Railways track was never built to sustain. Built by DFCCIL under the Ministry of Railways, with long-term financing from Japan's JICA and the World Bank, the corridor links India's busiest gateway ports — JNPT, Mundra and Pipavav — directly to the industrial belts of the National Capital Region, Haryana and Rajasthan. Paired with its counterpart, the 1,337-km Eastern Dedicated Freight Corridor, India now has a 2,843-km freight backbone running through the heart of the Delhi–Mumbai Industrial Corridor.

What makes this moment worth a dedicated telling, rather than a single news brief, is everything now riding on the corridor's back: the private terminal operators recalibrating capacity at JNPT and Mundra, the rail-linked multimodal logistics parks rising along the route, the container train operators repositioning fleets, and the freight-cost arithmetic that could nudge India closer to its long-stated goal of trimming logistics costs from double digits of GDP. Three more corridors, backed by an estimated Rs 4.5 lakh crore, are already on the drawing board.



THE PORT THAT RAIL IS REBUILDING

How the Western Dedicated Freight Corridor is repositioning Hazira from a regional Gujarat facility into a serious inland-to-coast gateway, as India's rail network becomes the primary organiser of cargo flows rather than a backdrop to it.

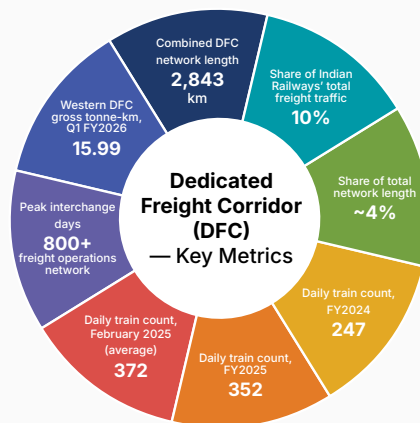
India's freight rail story is entering a new chapter. For most of its history, rail was a bulk commodity carrier: coal, cement, fertiliser, grain. Private cargo operators occupied a narrow niche, and ports were served by congested mixed-use lines that shared tracks with passenger trains at average speeds of barely 25 kilometres per hour. That paradigm is ending. The Dedicated Freight Corridors (DFCs) are changing the competitive geometry of Indian logistics, and for no port is that shift more consequential than Hazira.

Handling 26 million metric tonnes of cargo in FY2024 and equipped with a container capacity of one million TEUs, Adani Hazira Port has historically been a competent but regionally bounded facility: strong in liquids, chemicals, petroleum, and south Gujarat's industrial trade, but limited in its reach to the vast consuming and producing hinterlands of northern and central India. The Western Dedicated Freight Corridor (WDFC) is changing that boundary with speed and structural force.

A System-Level Shift

The scale of what has happened on India's freight corridors in the past two years is

Metric	Figure
Cargo handled, FY2024	26 million tonnes
Container capacity	1 million TEUs
Liquid terminal	219 tanks; 620,000 kilolitres capacity
Primary cargo streams	Containers, bulk liquids, petroleum, chemicals, edible oils, automobiles, general cargo
Operator	Adani Hazira Port Pvt Ltd (APSEZ)



striking. Ravindra Kumar Jain, Managing Director of DFCCIL, has described the DFC as a gamechanger that is envisaged to reduce the unit cost of logistics through faster, heavier and longer freight movement. Writing to the Railway Board on new corridor proposals, Jain noted that DFCCIL is expanding its scope well beyond traditional cargo to include e-commerce, LNG containers and Over Dimensional Cargo, and has specifically flagged automobile transport along the Western DFC from Surat to Kanpur as an emerging opportunity. That geography places Hazira directly in the strategic frame.

That automobile flag is not speculative. Gujarat is already one of India's densest car-manufacturing clusters: Suzuki Motor Gujarat's Hansalpur plant alone runs at a capacity of 1 million vehicles a year, alongside Tata Motors' Sanand facility and manufacturing lines for MG Motor and Hero MotoCorp in the same industrial belt. Finished vehicles and components moving north from these clusters toward NCR and central India are precisely the kind of high-value, time-sensitive cargo a 100-kilometre-an-hour electrified corridor is built to carry —

and precisely the traffic legacy mixed-use lines could never win from road transport.

The Connectivity Arithmetic for Hazira

The WDFC runs 1,506 kilometres from Dadri in Uttar Pradesh to JNPT in Mumbai, with a feeder spur connecting directly into Hazira alongside Mundra and Kandla. Engineered for 25 kV AC electrification and 100 kilometres per hour operation, it has already cut transit times from western ports to NCR by half compared to legacy mixed-use lines. For Hazira, which once competed at a disadvantage on hinterland reach against Mundra's better-established rail connections, this is a structural rebalancing. That completion date matters: the corridor described above is no longer a work in progress. Combined with the Eastern DFC (Ludhiana–Dankuni, 1,337 km), commissioned in October 2023, India now has a continuous 2,843-kilometre dedicated freight spine connecting its major ports to its

Parameter	Specification
Route	Dadri (Uttar Pradesh) to JNPT (Navi Mumbai), with a Hazira feeder spur
Length	1,506 km
Electrification	25 kV AC, double-line
Design speed	100+ km/h
Axle load	25 tonnes (track), 32.5 tonnes (bridges)
Max train length	1,500 metres (up to ~400 containers, double-stacked)
Status	Fully commissioned end-to-end, 31 March 2026



Node	Scale / Detail
Kathuwas MMLP, Rajasthan	283 acres; India's largest Multi-Modal Logistics Park; handles double-stack rakes from Hazira, JNPT, Mundra and Pipavav
Dadri-Greater Noida-Jewar hub	Planned capacity of 1.44 million TEUs and ~7.9 million tonnes of bulk cargo a year, at the WDFC-EDFC junction
Dadri Multi-Modal Logistics Hub	27.8% rise in key rail zones (Indian Railways loading data)

industrial heartland for the first time. The early evidence of Hazira's rail ambitions predates the WDFC. CONCOR began running regular container rakes from ICD Pithampur-Ratlam in central India to Hazira several years ago, and Shahzad Athar, then AGM Sales at Adani Hazira Port, noted at the time that Hazira was already around 270 kilometres shorter in distance from Pithampur than Nhava Sheva, with lower rail freight rates. Major shipping lines including Maersk, MSC and CMA CGM were already using that rail link for export boxes. The WDFC amplifies all of that: faster paths, higher train density, double-stack efficiency, and access to hinterlands that were previously beyond competitive reach.

The CONCOR Multimodal Logistics Park at Kathuwas in Rajasthan, 283 acres and the largest MMLP in India, is now connected to Hazira via double-stack container trains on the WDFC network, serving traffic from Hazira, JNPT, Mundra and Pipavav under one consolidated inland hub. A cargo owner in NCR or Rajasthan can now access Hazira with comparable transit certainty and competitive rail freight cost to any other major western port. For a shipper based in Jaipur or

Factor	Detail
Pithampur to Hazira vs Nhava Sheva	~270 km shorter via Hazira, at lower rail freight rates
Double-stack rail cost saving	Up to 40% lower than conventional freight movement (APM Terminals)
Container traffic growth	27.8% rise in key rail zones (Indian Railways loading data)
Axle load advantage	25t track / 32.5t bridges vs 22.9–25t on legacy lines

Dimension	Before WDFC	After WDFC
Hinterland reach	Regionally bound to south Gujarat	Direct rail access to NCR, Rajasthan and central India via Kathuwas MMLP
Typical line speed	~25 km/h on shared mixed-use track	100+ km/h on dedicated electrified track
Rail freight cost (double-stack)	Baseline	Up to 40% lower
Position vs Nhava Sheva (Pithampur origin)	Distance disadvantage	~270 km shorter, lower freight rates

Alwar, that combination collapses what used to be a genuine mode-choice decision into something close to a formality. Containers can now move by dedicated double-stack rail from Kathuwas straight to Hazira's berths, at a transit reliability that road transport — dependent on national highway congestion around Ahmedabad and Vadodara, and on driver availability during festival and monsoon disruptions — cannot consistently match. That reliability, as much as the headline cost saving, is what large exporters increasingly write into their logistics contracts.

The Cost and Cargo Case

The economics are becoming compelling across multiple dimensions. DFC-enabled double-stack operations can reduce rail freight costs by up to 40 percent compared to conventional freight movement, according to APM Terminals. Higher axle loads of 25 tonnes on track and 32.5 tonnes on bridges, combined with dedicated high-speed paths, push per-unit costs down further. For shippers evaluating port choice on a landed-cost basis, Hazira's proximity to Gujarat's industrial clusters combined with WDFC-enabled rail rates to the north creates a genuinely competitive cost structure.

The cargo mix at Hazira reinforces the scale of the opportunity. The port handles containers, bulk liquids, petroleum products, chemicals, edible oils, automobiles and general cargo. Its liquid terminal alone has 219 tanks with a total calibrated capacity of 620,000 kilolitres.

As the WDFC matures, containerised exports from textile clusters in Rajasthan, automotive components from NCR, FMCG goods from northern India and even e-commerce returns logistics are all cargo streams Hazira can now pursue. Indian Railways reported a 27.8 percent rise in container traffic in key zones in recent freight loading data, confirming that containerised modal shift is already accelerating.

Hazira's repositioning cannot be understood in isolation. It is part of a broader structural logic that logistics experts have been articulating with growing clarity.

MMLPs and the Node Effect

Hazira's repositioning cannot be understood in isolation. It is part of a broader structural logic that logistics experts have been articulating with growing clarity. Poroma Munshi Rebello, with extensive experience in port and inland logistics, argues that rail does not win with single isolated moves, but by creating density and network effects: aligning industrial clusters with reliable rail corridors and distribution anchors.

The Dadri-Greater Noida-Jewar hub at the intersection of the Eastern and Western DFCs, planned to handle 1.44 million TEUs and nearly 7.9 million tonnes of bulk cargo annually, exemplifies this principle at the northern end of the WDFC. Hazira, connected to that same spine via branch spur, becomes a beneficiary of the entire network's density, not just its own infrastructure.

Manish Puri, President of the Association of Container Train Operators, has argued that India's freight rail must evolve from a supply-side mentality into one that is demand-driven and user-centric: rail operations must start with what customers need, not what the network can offer. For Hazira, that means the port's marketing proposition increasingly leads with rail schedules, transit time guarantees and freight rate structures rather than maritime specifications alone.

Metric	Scale Indicator
Hazira (Adani)	26 million tonnes cargo (FY2024); 1 million TEU container capacity
Mundra (Adani)	~180 million tonnes annual cargo capacity
JNPT (Nhava Sheva)	27.8% rise in key rail zones (Indian Railways loading data)
Axle load advantage	8.17 million TEU container throughput

Tariffs, Sustainability and the Road Ahead

Challenges remain. Tariff rationalisation is an unresolved issue across the Indian rail freight system: private operators and shippers have consistently highlighted the gap between rail's structural efficiency and the pricing reality for lighter cargo categories such as FMCG and retail. Until pricing models better reflect market demands on those segments, rail will struggle to displace road entirely on key origin-destination pairs, even with WDFC capacity behind it.

The sustainability argument, however, is strengthening. The WDFC's fully electrified infrastructure offers a material carbon advantage over long-haul diesel trucking, a factor that is rapidly moving from corporate aspiration to procurement criterion. Companies now track scope 3 supply chain emissions with the same rigour as cost, and the rail advantage in carbon intensity

is becoming increasingly central to tender decisions. For Hazira, that positions DFC-connected rail movements as a premium sustainability product for exporters and importers under emissions scrutiny.

The Berth-Side Answer

Rail connectivity alone does not make a port competitive — it has to be matched by capacity to load and discharge the cargo that connectivity brings in. Adani Hazira Port has its own expansion plan in motion. The company has secured environmental and coastal regulation zone clearance from the Ministry of Environment, Forest and Climate Change's expert appraisal panel to add 150 million tonnes of handling capacity, taking Hazira from its currently approved 84 million tonnes to 234 million tonnes, at an investment of over ₹14,000 crore. The plan centres on 19 new multi-purpose berths in an outer harbour built on reclaimed land, dredged to a depth of 21 metres to admit larger vessels, and designed to handle dry cargo, project cargo, containers, liquid cargo and cryogenic gas including LNG down to -160°C.

The expansion is explicitly built around rail evacuation: the port plans a dedicated railway line in partnership with GRIDE, the Gujarat government-Indian Railways joint venture, designed to move the added volumes without pushing more trucks onto already congested approach roads. Once complete, Hazira will operate 31 multi-purpose berths, up from six developed today — giving it, for the first time, both the inland reach the WDFC provides

and the quayside capacity to convert that reach into throughput. Hazira is not about to displace Mundra's 180 million metric tonne scale or JNPT's 8.17 million TEU throughput. But that is not the competitive question. As industry observers and DFCCIL's own leadership have made clear, port advantage in India's next decade will be determined not by berth count or draft alone, but by how well a port integrates with high-capacity inland corridors. By that measure, Hazira's trajectory is pointed firmly upward. The Western DFC has given it the reach. The question now is how aggressively its commercial teams, shipping line partners and logistics operators convert that reach into volume. 



As the WDFC matures, containerised exports from textile clusters in Rajasthan, automotive components from NCR, FMCG goods from northern India and even e-commerce returns logistics are all cargo streams Hazira can now pursue.





THE PRICE PROBLEM

Why India's Freight Rail Boom Still Can't Undercut the Truck

Track has been laid at record pace, and freight trains now run under wire from Dadri to the coast. But by the government's own admission, the tariff structure underneath that hardware still favours the road it was built to beat — and the commodities ports are chasing hardest are exactly the ones rail prices out.

India's freight rail story has a second chapter that rarely makes the infrastructure headlines. The Dedicated Freight Corridors are 96.4 percent commissioned, daily train counts on the combined network have risen from 247 in FY2024 to over 400 by mid-2026, and average freight loading has climbed from 4.2 million tonnes a day in 2024 to roughly 4.4 million tonnes in 2025. Yet Indian Railways' share of the national freight task remains lodged at around 27 percent, well short of the National Rail Plan's target of 45 percent by 2030. The Economic Survey 2025-26, tabled in January, put a name to the gap: persistently high rail freight tariffs are a structural weakness in India's logistics ecosystem, one that continues to tilt competition toward road transport even as the physical network improves.

The Survey's language was unusually direct for a government document. It warned that cross-subsidisation within Indian Railways continues to skew competition in favour of road, and that elevated freight rates feed through into higher commodity prices and consumer inflation. The prescription it offered was equally direct: rationalise freight pricing, and rail could recover both revenue and market share at the same time.

The Arithmetic That Doesn't Quite Work

On paper, rail's cost advantage looks decisive. The first government-commissioned, ground-up study of India's logistics costs — the NCAER-prepared Assessment of Logistics Cost in India, released by the Department for Promotion of Industry and Internal Trade in September 2025 — put rail at Rs 1.96 per tonne-kilometre, the cheapest mode after

waterways at Rs 2.3. Road transport averaged Rs 3.78 per tonne-kilometre, and air freight Rs 72. On that basis, the Economic Survey's claim that rail is nearly 50 percent cheaper than road holds up.

The qualifier is what the headline number leaves out. The rail figure excludes first- and last-mile movement, terminal handling and trans-shipment costs, all of which are unavoidable for cargo that does not originate and terminate on a railway siding. Once those are added back, the DPIIT study found that pure road haulage remains cheaper for short distances, and that multimodal rail-plus-road only breaks even beyond roughly 600 kilometres if the feeder legs are 50 kilometres each side — stretching to around 1,000 kilometres if those feeder legs run to 100 kilometres. For heavy-duty trailers above 55 tonnes, road's per-tonne-kilometre cost of Rs 1.51 undercuts rail outright. That threshold matters enormously for exactly the cargo India's rail network is now trying to win: containerised, palletised, time-sensitive freight that rarely moves in the 600-kilometre-plus, full-train-load pattern rail's pricing was built around.

A Revenue Base Built on the Wrong Cargo

Indian Railways' freight book is heavily skewed toward bulk commodities: coal, iron ore, cement, foodgrains, fertiliser, petroleum and limestone account for roughly 84 percent of freight traffic and contribute an average of 68 percent of the railway's total internal revenue between FY18 and FY27. Container services — the closest available proxy for non-bulk freight — have grown from around 4 percent of revenue in FY18 to an estimated 6 percent in FY27. That imbalance is

becoming a structural problem rather than a historical curiosity. A PwC report from July 2025 projected that commodities with low or negligible rail modal share — consumer durables, paper products, pharmaceuticals, textiles and FMCG — will grow at roughly 10 percent a year through 2030, nearly double the 5 percent pace expected for traditional rail cargo.

Indian Railways knows this. In January 2026 it convened an industry-wide focus group specifically on "Increasing the Modal Share of Railways in FMCG Freight Traffic in India," bringing consumer-goods companies and railway officials together to identify pricing, infrastructure and operational barriers. The automobile sector offers the template for what is possible: modal share for auto transport

The relevance for ports riding the Western DFC's expansion, Hazira included, is direct. As container volumes on WDFC-linked routes scale up, the same port-side congestion, ground-rent pass-throughs and underframe costs that CTOs have raised at Mundra are structural risks wherever rake turnaround cannot keep pace with train frequency.

rose from 1.2 percent in FY14 to roughly 20 percent in FY24, driven by a modernised AFTO wagon scheme and new loading terminals, with haulage charges left broadly unchanged for a decade. FMCG has no equivalent playbook yet, and freight rates for lighter, high-value cargo are still built around minimum chargeable weight per wagon rather than actual load — a structure the Railways' own draft National Rail Plan has acknowledged makes rail intrinsically less competitive for exactly this cargo.

The Cement Experiment

The clearest test case for reform to date is bulk cement. In November 2025, Indian Railways scrapped the decades-old system of distance and weight-based tariff slabs for cement moved in tank containers, replacing it with a flat rate of Rs 0.90 per tonne-kilometre, later trimmed to Rs 0.85 after industry pushback. Railway Minister Ashwini Vaishnaw has since asked the Railway Board to identify other commodities where a similar unified rate could apply, effectively piloting the tariff rationalisation the Economic Survey called for, one commodity at a time.

The early verdict from logistics economists is mixed. By flattening the rate structure, the reform removes the telescopic discount that long-haul cement shippers previously earned as distance rose, a discount that reflected rail's genuine unit-cost advantage over distance and that, critics argue, is now being given away just as the corridor network makes long-haul movement cheaper to run. There is also a

technical wrinkle: because the new rate is charged on a gross tonne-kilometre basis rather than net tonne-kilometre, the dead weight of the empty wagon itself is now billed alongside the cargo it carries, a cost the previous system did not impose. Whether the reform ultimately shifts volume from road to rail, as intended, will not be clear until FY2026-27 numbers are in. But the direction of travel, unified, simplified, more transparent pricing, is the model likely to be extended to other commodity groups, FMCG among them.

Where the Friction Actually Sits: Ports and Container Train Operators

Headline tariffs are only part of the cost a shipper actually pays. Private container train operators, the CTOs who run the rakes connecting ports such as Hazira, Mundra and JNPT to inland terminals, absorb a layer of charges that sits on top of the base haulage rate and rarely features in the national tariff debate: stabling charges for idled rakes, haulage of empty wagons, and underframe running when double-stack loading isn't available. The Association of Container Train Operators has flagged exactly this friction at Mundra, Gujarat's largest container gateway, where port-side loading shortfalls of 10 to 15 percent against planned rake utilisation have forced operators into costly underframe movements.

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ground-rent pass-throughs and underframe costs that CTOs have raised at Mundra are structural risks wherever rake turnaround cannot keep pace with train frequency. A port's rail connectivity is only as commercially attractive as the total delivered cost a shipper pays, and that number is set as much by operational friction at the yard as by the DFCCIL tariff on the main line.

The Reform That Has to Come Next

None of this diminishes what the DFC network has achieved on the infrastructure side. But the Economic Survey's own framing is the right one to end on: capacity and pricing are two separate problems, and India has only solved the first. Indian Railways has set itself a target of 3,000 million tonnes of freight and 45 percent modal share by 2030, up from roughly 27 percent today and 1,656 million tonnes moved in calendar year 2025. Hitting that target on bulk commodities alone is arithmetically difficult, since coal, cement and steel are themselves forecast to grow at a modest 5 percent a year. The only path to 45 percent runs through FMCG, pharma, textiles, e-commerce and containerised general cargo, precisely the freight categories current tariff design prices out below a few hundred kilometres.

The corridors are built. The trains are running. What should ideally come next is a genuinely rationalised, commodity-agnostic freight tariff, and a cleaner allocation of the frictional costs that sit between the DFCCIL rate card and the price a shipper actually pays. 





GROWTH IS CONFINED TO THE HINTERLANDS, NOT THE PORTS

Gyan Abhishek, Head of Intermodal, South Asia, A.P. Moller Maersk, talks to Kalpana Pandey, on why WDFC-linked inland reliability is reshaping port rotation, shipper tenders, and the case for rail as a strategic mode

As the WDFC stabilises high-frequency double-stack connectivity into North India, how are you rethinking west coast port rotation strategies, and which inland performance metrics (transit reliability, rake availability, ICD throughput) are actually shaping those decisions?

The stabilisation of the WDFC is fundamentally reshaping how we think about West Coast port rotations. Historically, port selection was often driven by maritime considerations and proximity to hinterland markets. Today, growth is confined to the hinterlands, not the ports; the inland rail network has become a strategic differentiator, enabling us to view ports and inland destinations as an integrated logistics ecosystem rather than stand-alone entities. With high-frequency double-stack services delivering predictable transit times into North India, we are increasingly evaluating ports for their ability to provide end-to-end supply chain reliability rather than for vessel productivity alone. The focus has shifted from merely choosing the nearest port to identifying the port-rail combination that consistently delivers the best customer outcome.

From an inland decision-making perspective, three metrics are particularly critical:

1. Transit reliability has become the most important factor, even more than absolute transit time, because it helps end users plan their supply chains more effectively.
2. Rake availability and asset productivity influence routing decisions. We have observed that even if a port is congested, but has assured rail capacity, it becomes a more attractive option for customers.
3. The performance of ICDs, which is determined by a combination of their

throughput, gate turnaround, stack utilisation, and evacuation capability, is becoming a key indicator as well.

Looking ahead, we believe West Coast port competition will increasingly be determined by network performance rather than port performance alone. The winning proposition will be the ability to offer a reliable, high-frequency, double-stack corridor with predictable end-to-end transit, efficient ICD handling, and sufficient capacity to support future growth.

In shipper negotiations comparing gateways like JNPA, Mundra, and Pipavav, how much of your competitive differentiation now rests on WDFC-linked inland evacuation efficiency versus traditional maritime factors like transit time and ocean freight?

The WDFC has significantly shifted the conversation during negotiations. While traditional maritime factors such as vessel connectivity, transit time, and sailing frequency remain important, the differentiation is increasingly shifting toward inland network performance and the predictability of the end-to-end supply chain.

For many customers, the deciding factor is consistency and reliability outweighing cost, making WDFC-linked inland evacuation a major competitive lever.

In fact, the traditional maritime elements have become relatively comparable across gateways, particularly where shipping lines offer similar network coverage. The real differentiation often emerges after the container is discharged from the vessel, and customers start looking at:

- Reliability of port-to-ICD transit.
- Availability of train capacity during peak periods.
- Frequency of services.



Gyan Abhishek

Head of Intermodal, South Asia, A.P. Moller Maersk



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- Dwell time at ports and ICDs.
- Exception management and recovery capability during contingencies.

Take APM Terminals Pipavav as an example, which can create a compelling proposition when combined with reliable WDFC-linked rail services and efficient inland execution, of-

fering customers an alternative gateway with competitive end-to-end performance. APM Terminals Pipavav is congestion-free, the first port on the electric route and the first on the double-stack route.

The WDFC enables scale through double-stack rail. Does your India cargo mix, especially laden export-import balance and commodity profile, fully align with that model, or are there structural mismatches limiting your utilisation?

It has been partially resolved. The WDFC was designed to maximise efficiency through high-volume, double-stack movements, and several segments of India's EXIM trade align well with it, particularly dry containers, retail and consumer goods, chemicals, engineering products, and increasingly some agricultural exports. However, structural mismatches still prevent full network optimisation.

First, the export-import imbalance remains a challenge. North-West India is structurally import-heavy across many corridors, creating repositioning requirements and reducing round-trip asset productivity. Double-stack economics are strongest when both directions are consistently laden, which is not always the case.

Second, cargo mix matters. A significant share of India's cargo base comprises commodities that are either weight-constrained, time-sensitive, temperature-controlled, or require specialised equipment. These flows do not always realise the full benefits of double-stack operations to the same extent as high-volume dry container cargo flows do.

Third, network and infrastructure constraints continue to create friction. While the WDFC has dramatically improved line-haul efficiency, first-mile and last-mile connectivity, terminal throughput, ICD readiness, and customer supply chain design need to evolve at the same pace to fully capture the corridor's potential, which remains to be realised.

This being said, the overall trajectory remains encouraging. As customers redesign supply chains around reliability rather than just transit time, and as inland rail-connected logistics parks mature, we are seeing a gradual shift of cargo categories that traditionally preferred road transport.



With WDFC promising schedule reliability, how are you addressing lingering shipper scepticism around rail, particularly for time-definite or high-value cargo moving to NCR and beyond?

Shipper scepticism towards rail is often shaped by historical experience rather than by current network capabilities. While the WDFC has transformed the infrastructure landscape and significantly improved schedule reliability, customer confidence is earned through consistent execution over time. Our approach has been to shift the conversation from promised transit times to demonstrated performance in reliability and predictability. Therefore, we focus on four key areas.

1. Consistency Over Speed
2. End-to-End Visibility
3. Building Confidence Through Pilot Movements
4. Resilience and Risk Management

Ultimately, the most effective way to address scepticism is through consistent performance over multiple shipping cycles. As customers repeatedly experience reliable, predictable deliveries into NCR and beyond, rail is increasingly seen not as an alternative mode, but as a strategic mode for time-sensitive and high-value cargo. The conversation is gradually shifting from "Can rail do it?" to "How much more volume can we move by rail?" This is perhaps the clearest indicator of growing market confidence.

Are your key accounts (FMCG, retail, automotive, chemicals) beginning to explicitly factor WDFC-linked rail connectivity into their routing tenders and carrier selection when evaluating you?

A few years ago, most tenders were driv-

The conversation is gradually shifting from 'Can rail do it?' to 'How much more volume can we move by rail?' This is perhaps the clearest indicator of growing market confidence.

en primarily by ocean freight rates, vessel transit times, and basic inland transport costs. Today, especially for large retailers, FMCG, automotive, and chemical customers, the discussion has broadened to include the performance of the entire supply chain corridor. WDFC-linked connectivity is increasingly becoming a key evaluation criterion because customers recognise that inland predictability often has a greater impact on their business than marginal differences in ocean transit or freight cost. For example, for FMCG and retail customers, inventory availability and replenishment reliability are critical, and this is where the supply chain's reliability and predictability come into play.

Similarly, for automotive customers, production schedules are tightly integrated with supply chains. For chemical customers, rail offers advantages in scalability, safety, and the predictable movement of bulk and containerised cargo.

In many cases, customers are now comparing end-to-end corridor performance rather than port-to-port transportation costs. The decarbonisation agenda is also accelerating this trend. 



WHY GTI IS BETTING ITS EDGE ON RAIL, NOT JUST THE WATERFRONT

As the Western DFC reaches JNPA, Gateway Terminals India argues that inland connectivity, hub-and-spoke logistics, and cargo evacuation speed — not berth depth alone — will decide the next phase of competition among India's west coast gateways

The Western Dedicated Freight Corridor's arrival at Jawaharlal Nehru Port (JNPA) has reopened a long-running debate on India's west coast: will faster, cheaper rail access finally erode the freight-cost advantage that Gujarat's ports have held over JNPA, or will other factors continue to decide where discretionary cargo goes? Gateway Terminals India (GTI), one of JNPA's principal container terminal operators, believes the answer is more nuanced than a simple rebalancing of rail economics — and that the real contest is shifting to inland connectivity, hub-and-spoke logistics, and how efficiently cargo can be evacuated once it lands on the quay.

On the cost question, GTI is candid. While the commercial framework for DFC freight to JNPA is still being finalised, current rail tariff structures mean Gujarat ports continue to enjoy a freight-cost advantage across multiple slabs, and the DFC extension may not by itself eliminate that differential for carriers and cargo owners. But GTI is equally clear that cost is only one variable in a much larger equation. Competitiveness, the company argues, is shaped just as much by efficient terminal operations, competitive terminal handling charges (THC), extensive shipping-line connectivity, and access to a wide range of direct services and

destinations through JNPA. GTI's own terminal handling charges are comparatively lower than some competing gateways, which helps offset broader logistics costs, while congestion pressures building up at faster-growing gateways are creating openings for cargo owners who prioritise reliability and flexibility over marginal savings.

Put together, GTI expects cargo allocation to be driven by a blend of cost, service reliability, network connectivity, and operational efficiency rather than rail economics alone. The DFC extension, in this reading, will narrow the logistics gap between India's major west coast gateways and make JNPA more competitive for north hinterland cargo — but it is unlikely to trigger a wholesale redistribution of container volumes. Instead, it raises JNPA's overall attractiveness and gives efficient terminals like GTI more room to compete on service quality, connectivity, and performance.



We view ICDs, MMLPs, and other inland logistics nodes as an extension of the gateway rather than as competing locations. Their role is to deepen our reach into the hinterland, improve cargo aggregation, and create a more efficient end-to-end service network for customers.



Inland nodes as extensions of the gateway, not rivals to it

A recurring theme in GTI's outlook is that ICDs, multi-modal logistics parks (MMLPs), and other inland nodes should be seen as extensions of the port rather than competing locations that siphon cargo away from it.

The DFC will sharply cut transit times to and from the northern hinterland, but GTI also sees it opening the door to hub-and-spoke models for inland locations that sit off the corridor itself. Cargo could move efficiently on double-stack trains along the long-haul section of the DFC, using strategically located hubs, before being distributed to surrounding inland nodes by feeder rail or road. Such a model would not only improve network efficiency but also ease terminal congestion at JNPA by consolidating volumes into larger train loads, cutting dwell time and improving asset utilisation — while making it economical to serve smaller inland markets without compromising service levels. GTI points to Varnama ICD as a good candidate for this kind of hub-and-spoke development, extending the benefit of DFC efficiency to a wider hinterland rather than diverting volumes away from the gateway.

Terminal systems built for the double-stack era

Asked how ready its infrastructure is for higher-speed, more synchronised port-rail operations, GTI points to a run of targeted investments made over the past few years in equipment, systems, and workforce training aimed squarely at handling double-stack DFC trains.

In 2023, the terminal upgraded its rail-handling capability with new rail-mounted gantry cranes (RMGCs) featuring greater lifting height and cantilever overhang, which allow containers to be pre-stacked outside the crane's operating area without disrupting crane movements — a change that has measurably reduced train turnaround times. Operating teams have since been trained specifically for double-stack operations, and GTI continues to coordinate closely with Indian Railways to optimise locomotive availability and cut idle time during rail exchanges.

A structural advantage, GTI notes, is that all container terminals at JNPA are DFC-ready,

giving the port considerable flexibility: dedicated rakes can move straight to individual terminal sidings, while mixed rakes are routed through the Port DFC siding. That flexibility is already showing up in the numbers — in the first few weeks of DFC operations at GTI, more than 90% of the double-stack rakes handled at the terminal were dedicated rakes carrying GTI cargo, a sign of both operational readiness and efficient capacity utilisation. As volumes grow, GTI expects this combination of modern equipment, trained operations, and flexible rail infrastructure to support the next phase of multimodal logistics growth at the port.

A more level playing field on the west coast

Looking beyond its own terminal, GTI expects the completed Western DFC to meaningfully reshape gateway competition on India's west coast by removing a structural advantage Gujarat ports have held for years. Cargo allocation from the northern hinterland should become more balanced, GTI says, as shippers gain more flexibility to choose gateways on cost, service, and transit time rather than rail geography alone.

Rail, however, is not the whole story. GTI highlights that shipping network design still matters a great deal: JNPA is called by many mainline services that skip Gujarat ports entirely, and on some Far East rotations, vessels call JNPA first, letting import cargo reach northern customers two to three days sooner. Export services that complete their Indian rotation at JNPA similarly give exporters extra time to connect cargo before vessel cut-offs. As DFC-enabled rail matures, GTI expects these advantages to make JNPA increasingly attractive for discretionary and time-sensitive cargo, producing some rebalancing at the margin — though it stops short of calling this a wholesale redistribution of volumes. The more accurate framing, in GTI's view, is that the DFC broadens routing choices and sharpens competition among west coast gateways, which ultimately benefits shippers through greater choice and reliability.

Redefining what makes a port competitive

GTI believes the WDFC is also changing the yardstick by which ports themselves are judged. Draft, berth capacity, and crane pro-

In the last five years, JNPA's container handling capacity has increased from approximately 6 million TEUs in 2021 to about 11 million TEUs today, and will keep rising. "The most competitive gateways will be those that combine efficient waterfront infrastructure with strong rail connectivity, inland logistics hubs, and seamless cargo evacuation capabilities," GTI notes.

ductivity remain fundamental, but landside connectivity, in the company's assessment, is now an equally important determinant of competitiveness.

Sustained growth at that scale, GTI argues, will demand a much greater shift towards rail, in much the same way bulk ports rely on rail for high-volume evacuation. The Western DFC strengthens rail capacity and northern hinterland connectivity, but its direct impact is moderated by geography: nearly 85% of JNPA's EXIM cargo originates within a 300 km radius and currently moves by road. That, GTI suggests, is where the next opportunity lies — in short-haul rail solutions for markets such as Pune and Nashik, extending the same evacuation logic that underpins the DFC to cargo that never touches the corridor at all.

Ports, in this view, are increasingly assessed as nodes within an integrated logistics network rather than as standalone marine assets, and the gateways that will lead the next cycle are those that pair strong waterfront infrastructure with rail connectivity and seamless cargo evacuation. For GTI, the Western DFC is an important step in that direction — but, as the company is careful to point out, not the final objective. 



REGULATIONS SHOULD PROVIDE FLEXIBILITY

Indranath Bose, Advisor, GE Shipping, speaks to Ramprasad Ravi, on the stalled Net Zero Framework, why the opposition isn't really about technicalities, and biofuels as shipping's most practical decarbonisation pathway

With the net zero framework's adoption remaining uncertain, what is this year's delay actually costing the industry?

It is difficult to answer this question. I believe it is better to give time to Member States at MEPC to adopt a regulation which enjoys consensus and is simple and practical for implementation.

The US and OPEC bloc remain firmly opposed to a carbon levy, while island nations and African countries back it for the revenue it would unlock. Do you see a compromise structure emerging, or is this a genuine stalemate?

Almost all IMO regulations are agreed and adopted with a spirit of co-operation, especially the ones related to GHG emission reduction, due to their much wider implications with respect to not just technical but also economic and social aspects. MEPC will surely find a compromise solution soon.

Some of the more influential Member States seem to be backing technical measures alone for now, rather than aligning with either extreme. Could this middle bloc end up shaping the eventual outcome more than the two poles of the debate?

That is more likely. The opposition to the Net Zero Framework is not on the technicalities

of it, it is on the fundamentals of it: the role of regulating international shipping through a carbon tax on GHG emissions. Today it is impossible to predict which fuel will be commercially viable and available at scale five years from now. The regulatory framework should ensure reliability for existing fleets and avoid disruption to global trade.

Emissions reduction targets should be based on verified data reflecting the availability, accessibility and scalability of alternative fuels, rather than theoretical end-state goals that create cost and compliance difficulties for the world fleet. I think these issues will shape the outcome.



Indranath Bose

Advisor, GE Shipping



Today it is impossible to predict which fuel will be commercially viable and available at scale 5 years from now. The regulatory framework should ensure reliability for existing fleets and avoid disruption to global trade.

Energy-saving devices have existed since 2013, yet uptake has only accelerated in recent years. What changed?

There is greater recognition among shipowners and managers about the environmental benefits, as well as economic benefits, that can be realised from energy-saving devices. Also, technical regulations like the Carbon Intensity Indicator, and cargo owners' and charterers' monitoring of vessels' emission performance, are influencing factors.

On ML-driven speed and route optimisation, what fuel savings are owners actually realising in practice, as opposed to what's being claimed in the market?

I cannot give a figure, though we have seen savings on long voyages in the past using manual monitoring and advice to the master by the service provider. Unfortunately, due to recent geopolitical upheaval, ships in general are made to undertake longer voyages and face inordinate waiting times, resulting in higher fuel consumption and emissions. The maritime logistics chain has never been this inefficient before.

The industry has cut carbon intensity by roughly 35% since 2008, largely through scale and slow steaming. How much further can efficiency gains alone carry the industry before alternate fuels become non-negotiable?

It depends on ship type and operational profile. For an average bulk carrier or tanker on mid- to long voyages, energy efficiency can be improved through technologies like propulsion improvement devices, superior low-friction antifouling coatings, and LED lighting systems. Once these are exhausted, use of alternative fuels, such as drop-in biofuel blends, becomes the most cost-effective option for such vessels. Wind propulsion may also be beneficial for some ships, depending on trading routes.

With DG Shipping finalising the green shipping policy, what would separate a commercially real outcome from another set of aspirational targets?

The draft National Green Shipping Policy of the Ministry of Ports, Shipping and Waterways has been coordinated and drafted by the National Centre of Excellence for Green Ports and Shipping, taking into account the Maritime India Vision (MIV) 2030, Maritime Amrit Kaal Vision (MAKV) 2047, and the IMO 2023 GHG Reduction Strategy. It encompasses seven pillars for decarbonisation of the maritime sector: Green Shipping (shipbuilding and ship repair), Green Ports, Green Ship Recycling, Green Finance, Green Skill Development and Green HR, Green Fuel, and Green Technology.

It has been developed following several rounds of consultations with stakeholders to ensure it takes commercial reality into account and provides adequate flexibility.

While targets for international shipping will be greatly influenced by what is agreed at the IMO, for coastal shipping the net zero target will remain 2070.

Biofuel blends are clearly in the lead right now, helped along by EU maritime regulation. Is this a genuine transition fuel, or one that simply outlasts its welcome because nothing else scales fast enough?

Operational experience demonstrates that sustainable biofuels are technically compatible with existing marine fuel systems and can be integrated within the current fleet without fundamental engine redesign or major

Due to recent geopolitical upheaval, in general, ships are made to undertake longer voyages, face inordinate waiting times resulting in higher fuel consumption and emission. The maritime logistic chain has never been this inefficient before.

retrofits. Practical implementation, taking into account engine makers' recommendations, confirms that blends up to B40 function as drop-in fuels under standard operating conditions, and that B100 use is technically feasible within existing machinery capability, subject to established fuel management practices.

Evidence indicates that sustainable biofuels constitute an immediately deployable compliance pathway capable of contributing to the 2023 IMO GHG Strategy while maintaining operational continuity within the existing fleet. When assessed on a life-cycle basis under robust sustainability criteria, the potential contribution of sustainable biofuels may extend beyond short- and medium-term transition periods. Of course, we have to see how cost and availability are affected by competing demand from the aviation and road transport sectors. Continued clarity and consistency in sustainability certification, documentation alignment and fuel classification practices would support the effective and transparent uptake of these fuels across the sector.

Removing and replacing 200 million tonnes of fuel oil used by international shipping annually takes time; a transitional period is necessary, during which regulations should provide flexibility until green e-fuels are available. Meanwhile, all practical and sustainable pathways to decarbonisation, from energy-saving devices and wind propulsion to alternative fuels such as LNG and bio-LNG and sustainable biofuels, and technologies like shore power and carbon capture, will be needed to achieve the goal. 



MUNDRA'S RAIL-LED GROWTH IS JUST GETTING STARTED

Alok Mishra, CEO – Ports & Terminals, DP World Mundra, talks to Ramprasad Ravi to talk about MICT's 13.6% throughput growth, its expanding rail network, and the terminal's next phase of capacity investment



Alok Mishra

CEO – Ports & Terminals,
DP World, Mundra

The Oxford Economics report puts MICT's GDP contribution at \$128.9 million in 2024, with a projection of \$9.2 billion by 2035. How do you see that trajectory playing out, and what gives you confidence in those numbers?

DP World's Mundra International Container Terminal (MICT)

delivered strong performance in CY25, with throughput rising 13.6% to nearly 1.5 million TEUs. Momentum extended into early 2026, with January volumes reaching 1,46,063 TEUs and February hitting 1,32,590 TEUs, both surpassing prior year levels and solidifying DP World Mundra's role as a major gateway connecting Indian businesses with global markets. As the Oxford Economics report highlights, DP World Mundra's

impact is already measurable, contributing \$128.9 million to India's GDP in 2024, including \$118.8 million in Gujarat. Improved global market access through MICT supports business expansion, higher exports and productivity gains. As India's manufacturing, exports and trade volumes grow, this underscores the need for sustained investment in port, inland logistics and supply chain infrastructure.

MICT handled 1.4 million TEU in 2024. What is your target for the next two to three years, and what are the primary drivers of volume growth right now? Where is the growth coming from — is it export-led, import-driven, or are you seeing a shift in the cargo mix?

Building on its growth momentum, MICT handled nearly 1.5 million TEUs in CY25, marking a 13.6% year-on-year increase in



DP World Mundra's impact is already measurable, contributing \$128.9 million to India's GDP in 2024, including \$118.8 million in Gujarat.

throughput. Our focus remains firmly on expanding capacity and enhancing connectivity. A key milestone in this journey has been the significant strengthening of our rail infrastructure, with increased handling capacity of nearly 50-55%. These advancements have not only improved operational efficiency but have also bolstered MICT's position as a reliable and future-ready logistics hub.

We are seeing robust demand from emerging industries in the Kutch region, particularly solar manufacturing and electronics, alongside rising trade with Gulf and African markets. Enhanced rail connectivity and integrated logistics services are enabling seamless movement of both import and export cargo.

MICT currently connects to 73 global ports. Which trade lanes are seeing the strongest momentum, and are there any new services or port calls in the pipeline?

MICT's growth is driven by its strong global connectivity, with access to 73 international ports and 14 weekly vessel calls. We are connected to all major trade lanes, including Southeast Asia, the Middle East, Africa, Europe and the Americas, with particularly strong momentum currently coming from the Far East and Middle East corridors.

Our multimodal network, supported by robust rail connectivity to key manufacturing and consumption hubs across western and northern India, further enhances the terminal's value proposition by enabling faster, more efficient cargo movement. This combination of global maritime connectivity and inland logistics allows our

customers to benefit from greater schedule reliability, shorter transit times and seamless access to international markets.

Rail connectivity across Gujarat, Rajasthan, Haryana, Punjab and Delhi is clearly central to your value proposition. How has multimodal uptake evolved, and where do you see the biggest untapped hinterland potential?

Businesses that have historically relied on road transport are now shifting towards multimodal logistics, driven by cost, reliability and sustainability advantages. This is creating significant headroom for additional rail-led cargo growth across North, Central and Western India, particularly among MSMEs and export-oriented manufacturers.

Across India, DP World has invested more than INR 1,800 crore in rail infrastructure and operates eight inland terminals, including Pali-Rewari, Modinagar, Panipat, Hazira, Hindaun, Ahmedabad, Hyderabad, and Pawarkheda. These are supported by over 100 owned container rakes, enabling deeper access into India's manufacturing and consumption centres.

Additionally, the launch of dedicated multimodal rail services such as SARAL, SARAL-2 and SARAL-3 demonstrates growing demand for integrated logistics solutions. These services have expanded connectivity between Gujarat, Chennai and the NCR, providing assured transit times, door-to-door delivery, cargo visibility and lower-carbon alternatives to road transport. As part of DP World's integrated logistics network, MICT combines port infrastructure,

rail services, inland terminals, coastal shipping and first- and last-mile trucking to deliver seamless end-to-end solutions. This allows cargo to move seamlessly from factories in inland markets to global shipping routes through Mundra. As of 2026, MICT handles over 320 trains per month, including EXIM cargo, with 70% operating as double-stack. This network links India's inland manufacturing centres to global trade routes through Mundra.

The Aten Papers case study illustrates how local businesses are using Mundra to access global recycled material markets. What other cargo segments or industries are emerging as significant users of the terminal? How would you describe the current cargo profile at MICT — which commodities dominate, and is that profile changing?

The Aten Papers case study reflects a broader trend at Mundra, with recycling-led manufacturing increasingly leveraging global supply chains. Beyond recycled paper, the terminal is seeing strong demand from industries such as chemicals, automotive and auto components, consumer goods, agriculture, manufacturing, and project cargo. MICT efficiently manages a wide spectrum of cargo, including containerised, reefer, hazardous, out-of-gauge, and

transshipment cargo. Project cargo has shown strong growth, with Mundra emerging as a key gateway for Morbi tiles, fresh agro produce, automotive products, auto parts, and industrial goods.

MICT was commissioned in 2003 as a container terminal at a non-major port. What infrastructure investments are currently underway or planned to sustain the next phase of growth? Are there any capacity expansion plans — berths, yard equipment, rail sidings — that you can share at this stage?

Ever since its commissioning in 2003, MICT has played a pivotal role in establishing Mundra as a critical gateway for containerised trade. Today, the terminal boasts a 632-metre berth with a 15.5-metre draft, three operational rail sidings, 18,500 sq. m of warehousing, and 50 acres of open container storage.

To support future growth, we have added a new quay crane and electric RTGs, while continuing to enhance berth productivity, yard efficiency, and vessel turnaround times. Combined with our on-dock rail connectivity and at-gate freight station, these investments enable us to deliver highly customised, customer-centric solutions — making MICT the preferred choice for trade, even during periods of market disruption. 



From Infrastructure to Integration

Vinay Patil, CEO, KSH Integrated Logistics, talks to **Kalpana Pandey,** about the rebrand signaling end-to-end ownership of India's supply chain

How is the “integrated logistics” model in India evolving compared to the traditional practice of piecemeal warehousing and transport contracting?

The Indian logistics industry is going through a structural shift. Traditionally, companies managed warehousing, transportation, manpower, inventory, and distribution through multiple independent vendors. That model worked when the market was fragmented, but it came with limited visibility, inconsistent service levels, and higher overall supply chain costs.

Today, customers look at their supply chain as one interconnected ecosystem. They want a single partner who can design, operate, optimize, and continuously improve the entire logistics network.

Integrated logistics brings together warehousing, transportation, inventory management, value-added services, technology, analytics, and last-mile distribution under one operating framework, creating end-to-end visibility, faster decision-making, better asset utilization, and a stronger customer experience. In India, GST, the growth of e-commerce, manufacturing expansion, infrastructure development, and digital adoption have all accelerated this shift. Logistics is now viewed as a strategic business enabler. At KSH, we're building toward

that future today, backing physical infrastructure with the technology and operating discipline it takes to make a supply chain move as one system.

➔ **KSH rebranded from KSH Logistics to KSH Integrated Logistics. From an industry perspective, what shift in service design and customer expectations does this signal?**

By becoming KSH Integrated Logistics, we're signalling our commitment to delivering complete supply chain solutions that combine:

- Multi-client and dedicated warehousing
- Transportation management
- Distribution and last-mile delivery
- Inventory visibility
- Value-added services
- Digital platforms and analytics
- Network design and optimization

“Integrated” reflects ownership across the entire supply chain journey. It also reflects our belief that logistics shouldn't operate in silos. Every warehouse decision influences transportation efficiency, inventory costs, customer service levels, and working capital. Our role is to optimize these interconnected elements to create measurable business value.

➔ **The Indian 3PL space is increasingly demanding integrated rental, management, and last-mile services. How**



Vinay Patil

CEO, KSH Integrated Logistics Pvt. Ltd.



India has made solid progress in logistics infrastructure. The next challenge, though, is operational integration rather than infrastructure creation.

has KSH adapted its stack to meet this consolidation trend?

Over the last few years, we've deliberately built toward this consolidation. Today, our offering combines:

- Grade-A warehousing infrastructure across strategic locations
- Warehouse operations management
- Control tower visibility
- Warehouse Management Systems (WMS) and Transportation Management Systems (TMS)
- Real-time performance dashboards
- Value-added services including packaging, kitting, labeling, and order fulfilment

More importantly, we've strengthened our consulting capability to help customers design optimized supply chain networks. This lets customers scale faster, reduce complexity, and work with one accountable partner instead of managing multiple contracts across their supply chain.

➔ **In your view, what are the key gaps in India's current logistics infrastructure that integrated providers like KSH are best positioned to fill?**

India has made solid progress in logistics infrastructure through investments in highways, dedicated freight corridors, multimodal logistics parks, and digital initiatives. The next challenge, though, is operational integration rather than infrastructure creation.

Some of the biggest gaps remain limited end-to-end visibility across supply chains, inconsistent service quality across regions, underutilized warehouse and transport assets, technology adoption that stays siloed instead of integrated, and the difficulty of scaling operations rapidly across India. Providers who combine infrastructure, technology, processes, and execution within a single operating model are well placed to close these gaps.

As India moves toward becoming a global manufacturing and consumption hub, logistics will be judged on how well movement is planned, tracked, and adapted in real time. 

KUEHNE+NAGEL SCALES SAF ACCESS THROUGH BOOK & CLAIM MODEL

Global Head of Sustainability Air Logistics **Fabiano Piccinno** on how certificate-based sourcing, airline MoUs, and digital quoting tools are widening SAF adoption across air cargo — including for Indian shippers

Kalpana Pandey

Expanding the role of SAF in air cargo decarbonisation
Kuehne+Nagel has been steadily expanding its use of sustainable aviation fuel (SAF) as part of a broader effort to support decarbonisation across the air freight value chain. The company offers SAF solutions to air cargo customers globally, enabling them to reduce the lifecycle greenhouse gas emissions associated with their shipments compared with conventional jet fuel. The level of emissions reduction depends on the SAF feedstock and production pathway and can be significant when assessed on a lifecycle basis.

Still, the quantities of SAF available globally remain small, making it all the more important for companies to invest in SAF in order to increase demand and create a secure environment for producers to scale production, said Fabiano Piccinno, Global Head of Sustainability Air Logistics at Kuehne+Nagel.

Certificate-based Book & Claim framework to improve accessibility

A central element of Kuehne+Nagel's approach is its certificate-based "Book & Claim" framework, which allows customers to support the use of SAF without being limited by specific routes, airlines, or physical fuel uplift locations. Under this model, SAF volumes are sourced by the company and the associated emissions-reduction attributes are allocated to customer shipments for sustainability reporting and disclosure. This mechanism is intended to improve scalability and accessibility while ensuring traceability and transparency.

Collaboration with airline partners and fuel stakeholders

To support wider industry adoption, Kuehne+Nagel works closely with airline partners, customers, and fuel suppliers. The company has entered into individual memoranda of understanding with a broad group of international carriers, including American Airlines, Air Cana-



The quantities of SAF available globally are still small, making it all the more important for companies to invest in SAF in order to increase demand and create a secure environment for producers to scale production.

—Fabiano Piccinno

Global Head of Sustainability Air Logistics, Kuehne+Nagel

da, Air France Cargo-KLM Cargo, Atlas Air, Azul, Cargolux, Cathay Cargo, Delta Air Lines, LATAM Cargo, Lufthansa Cargo, SWISS, Turkish Airlines, and United Airlines. These collaborations focus on accelerating the uptake of SAF, improving emissions data quality, and advancing shared sustainability objectives across the air cargo ecosystem.

Integrating SAF options into digital quoting tools

Kuehne+Nagel was also among the early air logistics providers to integrate a SAF selection

option into its digital quoting tools. This enables customers to opt for SAF-related solutions as part of their shipment planning, aligning operational decisions with longer-term climate targets.

Scaling SAF volumes and emissions avoidance

According to the company's sustainability disclosures, Kuehne+Nagel sourced approximately 29 million litres of sustainable aviation fuel in 2024. Based on lifecycle assessments, this contributed to the avoidance of more than 75,000 tonnes of carbon dioxide emissions compared with the use of conventional aviation fuels. These volumes were achieved through partnerships with fuel producers and airline stakeholders and form part of the company's ongoing efforts to scale lower-emission solutions.

SAF within a broader decarbonisation strategy

SAF is one pillar of a wider decarbonisation strategy that spans all modes of transport. Kuehne+Nagel has set ambitious goals to reduce environmental impact, including a science-based target to reduce absolute scope 1, 2 and 3 emissions by 33% by 2030 (baseline 2019), achieving 100% renewable energy consumption at all sites by 2030, and reaching net zero by 2050. Complementary measures include low-emission transport solutions, sustainable logistics, fleet electrification, renewable energy, circular waste management, and warehouse and office efficiency, among others.

Global availability, including for Indian customers

These sustainability solutions are available globally, including for customers operating to and from India. Indian shippers can participate in SAF programmes through the same certificate-based approach and receive documentation to support emissions reporting, alongside access to digital dashboards that provide visibility into supply chain carbon performance. 



SEAFARER SAFETY MUST NOT BECOME A CASUALTY OF GEOPOLITICS

Chris Goldsworthy, Chief Executive, IMarEST, talk to Kalpana Pandey, on why crew welfare, mental health, and fatigue management must keep pace with a shipping industry navigating conflict zones and decarbonisation at once

With Houthi attacks in the Red Sea flaring up again in July 2026 despite the October ceasefire, how is IMarEST advising members and shipping companies to reassess risk for vessels transiting the Bab el-Mandeb and Strait of Hormuz?

The resurgence of attacks highlights the reality that the safety and mental health of crew must remain the overriding priority for shipping companies. From an operational perspective, the situation also reinforces the importance of professional competence and preparedness. We are encouraging our members to follow the latest guidance from naval and maritime security authorities, conduct fresh voyage-specific risk assessments for both cyber and physical security, and revisit contingency planning for both the Bab el-Mandeb and Strait of Hormuz.

The IMarEST's role is to support everyone in the sector with expert knowledge, technical guidance, and the sharing of best practice. Our core message is clear: do not assume earlier risk assessments are valid. The current environment demands continuous monitoring, regular review, and a proactive approach to maritime security risk management.

Beyond rerouting around conflict zones, what concrete measures should flag states, shipowners, and unions be taking right now to protect the physical and mental safety of seafarers caught in geopolitical flashpoints?

Our seafarers must not become an overlooked consequence of geopolitical tensions. The global economy depends on their professionalism and resilience, and we have a collective responsibility to provide the protections, resources

Our seafarers must not become an overlooked consequence of geopolitical tensions.

and support they need to operate safely in a complex security environment. Protecting seafarers cannot begin and end with rerouting. Flag states should also ensure that security guidance is current, practical, and consistently communicated. It's essential that there is a process for rigorous risk assessments, access to security support, and fatigue management, all underpinned by proper training.

I am particularly passionate about the subject of mental health, and I often call for the wellbeing of seafarers to be treated as an operational



Chris Goldsworthy
Chief Executive, IMarEST



Protecting human performance, wellbeing and resilience is every bit as important as protecting ships, cargoes, and trade routes.

necessity, not an add-on. This is particularly true for those affected by traumatic incidents. Stranded crews are far from home, sometimes with limited connectivity, so ensuring seafarers can communicate with families is equally important. The IMarEST has produced a Mental Health Guide for Ship Managers, which we hope will help the industry implement measures that make a difference in this area.

Crew fatigue from longer, rerouted voyages is a growing concern. Does IMarEST believe current international rest-hour and manning regulations are adequate for this new normal, or do they need revisiting?

Crew fatigue has become one of the most significant but often less visible consequences of today's maritime environment. Longer voyages, rerouting around conflict zones, increased security watchkeeping, and operational uncertainty all place more demands on seafarers. The existing international framework, including the STCW and Maritime Labour Convention requirements on hours of rest and fatigue management, provides an important foundation. However, the question is whether compliance alone is sufficient. There is a strong case for reviewing whether

current assumptions underpinning crew level models remain appropriate for longer and more complex voyages. We are seeing situations where crews may spend more time at sea, face heightened security requirements, and operate under increased psychological stress. In my opinion, the conversation should move beyond ship owners simply counting hours of rest to include reviewing crew levels, work patterns, and onboard responsibilities. Technology can certainly help with this, but it is not yet a substitute for adequately rested crews.

We would welcome further evidence-based discussion among regulators, industry, unions, and seafarer representatives on whether aspects of current provisions require updating. The IMarEST will use our observer status at the International Maritime Organization (IMO) to advocate for progress in this area.

War-risk zones raise questions about combat pay, insurance, and the right to refuse a voyage. Where does IMarEST stand on strengthening seafarers' contractual protections in active conflict areas?

As an ex-seafarer, and the current CEO of the largest industry body of its kind, I believe that crew welfare and safety must remain the primary consideration in any decision to trade through active conflict zones. On contractual protections, we support regular review of existing arrangements to ensure they remain fit for purpose as security threats evolve.

War-risk compensation and insurance provisions should be transparent, consistent, and clearly communicated and understood by all parties before voyages commence. Constructive dialogue between shipowners, unions, flag states, underwriters, and international organisations is critical. The IMarEST's role is not to negotiate employment terms, but we strongly support evidence-based policies through our work at the IMO that enhance the safety, wellbeing, and professional standing of seafarers.

Piracy and armed robbery persist in the Gulf of Guinea and parts of Southeast Asia even as attention is fixed on the Red Sea. Is global seafarer security policy at risk of becoming too reactive to whichever crisis is loudest? International piracy, armed robbery, kidnapping, cargo theft, and other forms of maritime crime continue to have grave consequences for crews, their families and the wider shipping industry. However, there is a real risk that maritime security policy becomes overly focused on the most visible crisis of the moment. The IMarEST's view is that maritime security

must be approached as a global, long-term challenge rather than a series of isolated emergencies, and the sector should avoid a cycle of reacting to crises only after incidents increase. A resilient global security strategy requires sustained investment in all regions where seafarers face elevated risks.

How is IMarEST working with the IMO, ILO, and national governments to create a more coordinated, global framework for evacuating or protecting crews when a region suddenly becomes a warzone?

The speed at which a maritime operating environment can deteriorate has become a defining challenge for the industry, one that no single organisation can address alone.

As the sector's trusted technical voice, the IMarEST brings together marine professionals to work at key international forums. Our focus is on marine engineering, science and technology, and we continue to contribute this expertise wherever it is relevant to discussions in this area. The goal should be a system in which no crew is left exposed.

Decarbonisation is putting new fuels (ammonia, hydrogen, methanol) onto ships. How is IMarEST weighing the safety-training burden this creates against crews already stretched by geopolitical instability? Safety must guide the energy transition, since seafarer confidence will ultimately decide whether low and zero-carbon fuels succeed. Our technical team is working with the IMO on the Net Zero Framework, and we're launching an industry consultation to keep members' and seafarers' needs central. The sector faces two transitions at once, energy and geopolitical security, both adding pressure without room to compromise safety. Crews are already stretched, so the answer isn't more training but smarter, competency-based training covering new fuel systems while cutting administrative duplication.

IMarEST is helping shape harmonised international training standards and has just launched IMarEST Learning, our online platform for members. What's the single most under-addressed threat to seafarer safety today, and what would an effective international response look like? Fatigue and human performance. We need to dispel the myth that fatigue is just about lack of sleep. Human factors should sit at the centre of maritime policy and operations, driving human-centred design. At IMarEST, we believe people are the industry's greatest asset: protecting their performance and wellbeing matters as much as protecting ships and cargo. 

LOGISTICS ARCHITECTS, NOT JUST FREIGHT MOVERS

Prediman Koul, CEO, Jeena & Company, in conversation with **Kalpana Pandey**, on leading India's oldest freight forwarder through digitisation, sector diversification, and global expansion

Jeena & Company is over 125 years old and India's largest freight forwarder. How has the firm adapted its end-to-end logistics model to the digitisation and consolidation trends reshaping India's freight forwarding sector today?

Jeena draws strength from our rich 125-year legacy while embracing a forward-looking spirit. We see ourselves as a dynamic company that continues to evolve with emerging technologies and industry trends. From OCR-powered customs documentation and intelligent classification systems to real-time customer dashboards and ESG tools that monitor carbon footprints, technology forms a core part of our identity. As a legacy brand, we integrate these advancements thoughtfully to deliver greater value, ensuring every upgrade and automation serves a clear purpose in enhancing efficiency and sustainability for our clients.

Jeena serves diverse industries — chemicals, pharmaceuticals, automobiles, engineering, retail, FMCG, and renewable energy. How are the logistics requirements and risk profiles across these sectors diverging, and what strategic adjustments are you making to serve them?

We clearly understand the requirements of the sectors, having served them for over 12 decades, and know how different they are from each other. Pharma demands strict cold chains and quick regulatory checks with

high product integrity risks. Chemicals need special handling for hazardous materials and safety compliance. Automobiles and engineering focus on just-in-time delivery and heavy part movements. Retail and FMCG want fast, flexible distribution, while renewable energy involves large, oversized shipments with project timelines. Risk profiles vary from temperature failures in pharma to transit damage in autos or regulatory fines in chemicals. To serve them well, we invest in sector-specific fleets, advanced tracking systems, and tailored training for teams. We have dedicated professionals for each sector who understand the needs of the diverse industries that Jeena has been serving with expert-driven, tailored solutions for decades. We also build stronger partnerships with industry players, which helps us deliver reliable service across all verticals and grow steadily. With your appointment as CEO and the expansion of the Board, how does this leadership transition reflect the broader industry shift from legacy family-run logistics to a more structured, growth-oriented organisation? Jeena, though being a family-run business, has always focused on being a structured organisation, eyeing growth and adaptation of core values and processes in line with MNC standards. My appointment as CEO, along with the Members of the Management Committee, marks a natural step forward. We bring fresh expertise in technology and global operations while keeping the core values intact. This shift mirrors the industry move from traditional family setups



Prediman Koul
CEO, Jeena & Company

to professional teams that drive efficiency and expansion. It helps us adopt better systems, serve diverse sectors with precision and expertise, and build stronger partnerships.

Customers gain from faster decisions and reliable service. We stay agile yet rooted in trust. This balanced approach positions Jeena for bigger opportunities in the years ahead.

Jeena has been planning to revamp its tech stack to adapt to the evolving business environment and expand into New Zealand and the USA. What are the key technology priorities for a 125-year-old logistics firm to stay competitive against tech-native freight forwarders?

Our focus is on seamlessly integrating advanced technologies into our business framework to enhance efficiency, visibility, and scalability. We leverage AI-powered solutions, advanced Warehouse Management Systems (WMS), and API-driven global connectivity to streamline



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operations and enable real-time collaboration. Our Transport Management System (TMS) offers end-to-end shipment visibility, from planning and



execution to billing, while supporting complex multi-pickup and multi-drop movements.

We also adopt a data-driven approach by analysing insights from ports, trade platforms, and public sources to identify emerging opportunities and align with customer needs. Technology-driven analytics, such as the use of OCR technology for manifestation and document reading, help us anticipate market trends, understand customer behaviour, and design customised, technology-led logistics solutions.

With 27 locations in India and a global partner network across 6 continents and 60 countries, Jeena emphasises “logistics architects” designing curated end-to-end solutions. How does this approach differ from traditional freight forwarding, and what value does it deliver to Indian shippers?

We call our team “Logistics Architects,” as we deliver complete end-to-end solutions tailored to each client’s needs instead of just moving cargo from one

point to another. Traditional freight forwarding often focuses on basic transport and standard rates. Our approach goes deeper. We study the full supply chain process, suggest custom routes, handle compliance, and monitor every step with care. This cuts costs and transit times, and protects cargo. For Indian shippers, it means smoother exports, better visibility with real-time sensors, and trust in our services. This sets us apart and helps us compete strongly in international markets, and across diverse sectors.

Jeena is one of the largest customs house agents and freight forwarders in India. How are evolving customs regulations, trade facilitation initiatives, and digital India infrastructure impacting your role as a customs house agent and freight forwarder?

Evolving customs regulations bring stricter compliance needs but also faster clearance processes under new trade pacts. We now spend more time training teams and using smart tools to meet updated rules without delays. Trade facilitation initiatives

like single window systems help cut paperwork and speed up movements. This allows us to offer quicker services to clients. Jeena’s IT infrastructure has been a big boost, with e-filing, online tracking, and integrated platforms that reduce human errors.

Overall, these developments make our role more strategic. We act as trusted advisors to many customers for their operational requirements, helping them navigate complexities smoothly and digitally. We keep investing in technology and people to stay ahead and updated to deliver reliable results.

The company offers time- and temperature-sensitive logistics, 3PL, project logistics, and customs brokerage. How are Indian shippers increasingly demanding integrated, multi-service contracts rather than point services, and how is Jeena meeting this demand?

We have noticed that Indian shippers prefer integrated contracts that cover everything from pickup to final delivery under one roof. They want fewer vendors, better coordination,

and full accountability for all their work. The need for simpler operations and lower risks in global trade drives this demand. Instead of handling point services separately, clients seek end-to-end solutions that save time and cut operational costs, without dealing with multiple stakeholders.

At Jeena, we meet this demand through our logistics architects, who tailor innovative solutions every time we have a complex cargo or a challenging shipment at hand. Our experienced teams combine air and sea freight, temperature-controlled logistics, 3PL services, project handling, and expert customs brokerage seamlessly. Clients look for one reliable partner for their complete supply chain needs with full transparency at every stage, and at Jeena, we ensure we meet their cargo demands effortlessly with our expertise.

How do you see port modernisation and inland waterway development reshaping India’s logistics costs, multi-modal connectivity, and export-import competitiveness?

These initiatives are game changers, lowering transport costs by easing road congestion and enabling cheaper bulk cargo via water routes. Connectivity improves as ports and waterways link seamlessly with rail and road, speeding cargo movement and boosting competitiveness through fewer delays. Jeena is adapting operations to leverage these upgraded routes for clients.

What trends will shape freight forwarding next, and how is Jeena preparing?

Three trends stand out: digital transformation for better visibility and decisions; investment in resilient multi-modal infrastructure, including logistics parks and corridors; and building future-ready talent alongside sustainability practices. Jeena is investing across all three. 

VIDARBHA'S CARGO GROWTH OUTPACES ITS RAIL CAPACITY

Shivkumar Rao, Founder Director, R&Y Logistics, talks to **Ramprasad Ravi**, on Nagpur's three ICDs, the investment wave reshaping Vidarbha, and why rail connectivity must catch up with industrial growth

Nagpur already has facilities such as CONCOR's ICD and DLI's Borkhedi logistics park. How do container volumes from these facilities compare?

Nagpur is one of the very few tier-2 cities in India with three

working ICDs. CONCOR was the first to set up here in the 1990s, later moving from its 35-acre yard at Ajni to a 110-acre site at MIHAN, closer to industries at MIHAN-SEZ, Butibori and Hingna. DLI followed with its Integrated Logistics Park at Borkhedi, about 34 km from the city. Adani's ICD, also at



Shivkumar Rao
Founder Director,
R&Y Logistics

Nagpur is one of the very few tier-2 cities in India with three working ICDs, and that itself tells you how much trade this region generates.

Borkhedi, began operations in November 2023 on a 75-acre plot. Together, these three give exporters and importers in Vidarbha a real choice.

Can you share the growth trajectory for containerized cargo in the Nagpur-Vidarbha region?

It hasn't been a straight line up. CONCOR's old ICD at Ajni was built for around 4,500 containers a month, but demand soon crossed 8,000. Volumes dipped around 2008-09 as handling charges rose and the global slowdown hit exports, pushing price-sensitive cargo like rice and yarn onto trucks. Since the move to MIHAN, and with competition from DLI and Adani, volumes have climbed steadily again. Rice remains the backbone, still roughly half the cargo profile at CONCOR's ICD, alongside textiles, steel, paper and engineering goods. New industrial investment should keep this growth healthy in the coming years.

There have been discussions about a faster link to Bangladesh via rail, marine, and riverine routes through Sindi. What is the current status?

There's a workable plan by INBD Express Private Limited to move Vidarbha cargo (cotton, auto parts, tractors, yarn) by rail from the Sindi logistics park in Wardha district to Haldia in West Bengal, then by river into Bangladesh, replacing the current route via Mumbai and Colombo. On paper, this cuts transit time from 20-25 days to just over a week, with plans to scale up to around 10 container trains a month. It would genuinely be cheaper and faster than today's route.

WHERE VIDARBHA SITS



- A — JNPT / Nhava Sheva (Mumbai)
- B — Vadhavan Port (upcoming)
- C — Mormugao Port (Goa)
- D — Chh. Sambhajinagar (Aurangabad)
- E — Haldia (WB) Bangladesh
- F — Visakhapatnam

Company	Project	Investment	Sector
	25 MTPA integrated steel plant, Gadchiroli	~₹1,00,000 cr	Steel
	Coal gasification & downstream derivatives complex, Linga (Kalmeshwar)	₹70,000 cr	Energy / chemicals
	Green energy manufacturing unit	₹16,000 cr	Clean energy
	Greenfield multi-category vehicle plant, Butibori	₹15,000 cr	Auto / EV
	Solar cell & module plant (5 GW / 3 GW)	₹13,650 cr	Clean energy
	Defence & aerospace project (drones, UAVs, munitions)	₹12,700 cr	Defence / aerospace
	Integrated steel plant, Gadchiroli	₹10,100 cr	Steel
	Integrated solar + battery storage (BESS) plant	₹10,080 cr	Clean energy
	Food & beverage manufacturing facility, Katol	₹1,513 cr	FMCG / food

Shaktipeeth Expressway, connecting Nagpur to Goa; it has cabinet approval, is planned at around 857 km, and carries an estimated cost of nearly ₹1 lakh crore. Once ready, it opens a direct road route to Mormugao Port, helping ore and bulk cargo movement.

Which seaports are most commonly used for cargo from Nagpur and Vidarbha?

Almost all containerized cargo moves through Jawaharlal Nehru Port (JNPT), or Nhava Sheva, near Mumbai. It's the biggest gateway due to frequent sailings and direct rail connectivity; JNPT handled around 7.3 million TEUs in 2024-25 alone. There's also growing discussion about connecting Gadchiroli to Visakhapatnam on the east coast.

What are the operational or cost challenges in moving cargo from Nagpur to these ports?

Distance is the first challenge. Nagpur is over 800 km from JNPT, so the region depends fully on rail or road. The bigger day-to-day issue is rake availability; last month, over 950 export containers were stuck at CONCOR's ICD in MIHAN for nearly two weeks due to a rake shortage, with exporters paying detention and demurrage and sometimes missing vessels. This is why road movement has picked up. With the Samruddhi Mahamarg open, many exporters now prefer road by trailer.

It isn't cheaper, but it's more reliable, since there's no rake wait and no risk of missing a vessel. So exporters have a real choice: rail for lower-cost bulk cargo, or road for speed and certainty. On the positive side, the Eastern and Western Dedicated Freight Corridors are nearly complete, which will slowly free up space for container trains on the main network, though neither corridor currently passes through Nagpur. This is exactly the gap the Maharashtra government should address, by pushing the Centre to connect Gondia and Nagpur to Aurangabad, and from there to Nhava Sheva and the upcoming Vadhavan Port. Such a link would change the game for Vidarbha's exporters: lower freight costs, less road congestion, and rail becoming the natural first choice again. The investment is there, the cargo is there, and now the infrastructure needs to catch up.

How do you see industrial growth in the region contributing to future cargo volumes?

The names investing here recently are among the biggest

in the country. Across the World Economic Forum at Davos (January 2025) and the Advantage Vidarbha conclave in Nagpur (February 2026), the region has seen major commitments: JSW Group (~₹1 lakh crore) for a steel plant at Gadchiroli, expected to be the largest in the world; Adani Enterprises (₹70,000 crore) for a coal-gasification and chemicals plant near Kalmeshwar; and Mahindra & Mahindra (₹15,000 crore) for a vehicle plant at Butibori.

Nagpur is also becoming a solar and battery hub, with Galaxy Solar, Avaada Group and HyZero investing a combined ₹40,000 crore-plus. Reliance Consumer Products and Super Smelters round out the list with food and steel investments respectively.

Are there particular sectors driving growth, such as auto, pharma, agro-products, or steel?

Steel will be the biggest, given Vidarbha's high-grade iron ore reserves. Lloyd Metals is currently the leading player, and with JSW and Super Smelters both building in Gadchiroli, the

region is positioning itself as a steel hub. Clean energy comes next, led by Galaxy Solar, Avaada and HyZero, followed by auto and EV manufacturing after Mahindra's Butibori investment.

Agro-products remain a traditional strength (oranges, non-basmati rice, cotton and cotton yarn all move well through the region's ICDs, mostly as exports via Nhava Sheva).

Pharma is smaller but growing too. Overall, this diversification means the region isn't dependent on any single commodity.

Are there new connectivity projects planned that will strengthen Sindi's position as a logistics hub?

Yes there are several. The Samruddhi Mahamarg is now fully operational end to end. Next is the Shaktipeeth Expressway, connecting Nagpur to Goa; it has cabinet approval, is planned at around 857 km, and carries an estimated cost of nearly ₹1 lakh crore. Once ready, it opens a direct road route to Mormugao Port, helping ore and bulk cargo movement. 

FREIGHT VOLATILITY IS THE BIGGEST CHALLENGE

Apar Industries, an energy conglomerate with a product portfolio spanning conductors, cables, specialty oils, polymers and lubricants, ships close to 2,000 TEUs a month out of India to 143 countries. In an interview with **Ramprasad Ravi, Venkateswara Rao**, speaks about the company's export footprint, the volatility of ocean freight rates, congestion at Nhava Sheva, and why he believes India needs a state-backed shipping line to counter the pricing power of global carriers.

Apar operates across a wide product range — conductors, cables, specialty oils, polymers, lubricants. Could you give us a sense of your current export-import volumes and the trade lanes and geographies that matter most to you?

Apar is an energy conglomerate with a turnover of roughly \$3 billion and a presence in 143 countries. Our overall mix is about 40% exports and 60% domestic sales, and we are present across all major geographies worldwide. The US is our single largest export market, accounting for around 40% of our export volumes. In terms of volumes, we ship roughly 1,500 containers a month, approximately 50% twenty-foot and 50% forty-foot equivalents, which works out to around 2,000 TEUs a month in exports. Of that, around 800 containers go to the US.

Which ports do you predominantly use?

We route about 80% of our shipments through JNPT and the remaining 20% through Nhava Sheva.

What are the most difficult challenges you face in your supply chain and logistics, both inbound and outbound?

The single biggest challenge on the outbound side is ocean freight rates. Freight costs need to be predictable for us to do business, but ocean freight is not in anyone's hands, not even a Walmart or a Reliance. We are all at the mercy of the European shipping lines, mainly Maersk, MSC, Hapag-Lloyd and CMA CGM.

Rates move drastically. We have seen them go from \$100 to \$7,000. Take the Middle East, we used to pay \$200 to Jebel Ali; today it is \$5,000. That is a 25-fold increase, and no business has the margins to absorb that.

People take advantage of crises, the Strait of Hormuz situation, the Russia-Ukraine war, the conflict in the Middle East. Whenever there is uncertainty, shipping lines make money and the shipper, and ultimately the consumer, pays for it. Costs rise and we lose the ability to plan.

I cannot tell you today what my ocean freight budget will be from April to March. Every company builds an annual budget, but we cannot give firm freight commitments to our customers. European freight rates have gone up three-fold, Latin American rates five-fold. How do you run a business when five times your margin is going into logistics? What India needs is one strong

Indian shipping line, a Bharat Container Line, properly funded. Give it ₹20,000 crore, have it acquire 50-60 ships and 15,000-20,000 containers, and it would bring a level playing field. Once a credible domestic alternative exists, every shipping line would be forced to compete on price. Right now, we operate entirely at the whims of the European lines. Israel has ZIM, China has COSCO. The Israeli government and defence ministry refused to allow ZIM to be privatised or sold to Hapag-Lloyd, because they understand the strategic value of a national shipping line. India has no equivalent. There is talk of a Bharat Container Line, but the government has not been serious about it.

Beyond freight rates, do you face challenges such as container non-availability or port congestion?

Yes, delays at every level. For the past three to four months, since March, we have faced serious challenges at Nhava Sheva. The port was declared a transshipment port for political reasons, without any thought given to what that would mean for Indian shippers. Trucks now wait for hours, sometimes days, to enter JNPT. That means detention costs for trucks and containers, damage charges, and an inability to meet the timelines we have promised customers.



Venkateswara Rao

Head – Logistics, Apar Industries Limited



We have seen rates go from \$100 to \$7,000. Take the Middle East — we used to pay \$200 to Jebel Ali; today it is \$5,000. That is a 25-fold increase, and no business has the margins to absorb that.

There are also blank sailings to contend with. MSC cancelled 12 vessels on its US service and redeployed them to China, just like that. There was no demand spike out of India, but because



China sneezed, we caught the cold. If Indian trade is going to be dictated by decisions made in China, how is India supposed to develop?

What has been your experience with the Dedicated Freight Corridor?

The DFC is a welcome development. Transit that used to take five to six days now arrives within 24 to 30 hours for time-bound shipments, and double-decker freight trains have also started running, another positive step. That said, the DFC leg towards JNPT still needs development. There are teething issues, some lines are occupied, and there isn't yet seamless movement from JNPT into North India. Once that is resolved, volumes will grow further.

How much do you rely on road logistics?

For our domestic business, we predominantly use road, though we are gradually moving towards a multimodal model: first mile by road, middle mile by rail, last

mile by road. Road still dominates, and credit for that goes to the work done by Minister Nitin Gadkari and the NHAI.

Road remains faster than rail. By road, we average 400 km a day; by rail, it's 150-200 km a day. Mumbai to Kolkata takes 15 days by rail against five days by road, and no customer will wait 15 days for cargo. Rail is only competitive with road on the Dedicated Freight Corridor.

Ideally, what logistics infrastructure would you like to see to improve efficiency and ease of movement?

All modes, road, rail and coastal shipping, need to be accessible and efficient. Coastal shipping is where India lags furthest behind. In Europe, 30-35% of cargo movement happens via coastal shipping; in India, it's barely 1-2%. Coastal shipping is less carbon-intensive and more cost- and time-efficient. We have eight plants near Silvassa, with Hazira as the nearest port, and we would like to move cargo



We have eight plants near Silvassa, with Hazira as the nearest port, and we would like to move cargo from Hazira to the rest of the country by coastal shipping. But apart from DP World, which runs one vessel every 10 days to South India, there are no real options.

from Hazira to the rest of the country by coastal shipping. But apart from DP World, which runs one vessel every 10 days to South India, there are no real options. India has the Shipping Corporation of India, but it doesn't run the services we

need. The government should incentivise industry to use coastal shipping and encourage shipping companies to establish services along India's coastal routes. Our coastline is a massive untapped opportunity, it could be linked with inland waterways, developed through dedicated zones, and built into a seamless network connecting the west coast to the east.

What are Apar's expansion plans and expected cargo growth in the coming years?

Apar is a fast-growing company. We have been growing at 20-25% a year and plan to maintain that trajectory, bringing new manufacturing capacity online every year and expanding existing plant capacities.

We are market leaders across our segments, the number one conductor company in the world, the third-largest specialty oils company globally, and India's largest exporter of cables. We expect to keep growing on that footing year after year. 

Rewiring Telangana's Supply Chains

Inside MPL's Bet on the Hyderabad–Vijayawada Corridor

MPL CEO Mohit Agarwal, talks to **Kalpana Pandey** on why the Hyderabad–Vijayawada corridor is the missing spine of South India's logistics map, why most multimodal logistics parks in the country underperform, and how the Chityal project aims to put Telangana's farmers, exporters and industry on a rail-first, cold-chain-ready footing.

The Hyderabad–Vijayawada corridor is emerging as one of South India's most closely watched logistics stretches — the link between Hyderabad's manufacturing and consumption base and the ports of both coasts.

MPL has staked much of its growth on it: a multimodal logistics park coming up at Chityal, on the South Central Railway line, built first for MPL's own captive cargo and now being opened to the wider market.

The Hyderabad–Vijayawada corridor is fast emerging as a key logistics spine in South India. How do you see freight flows evolving here over the next five to ten years, and what's the biggest gap between policy and infrastructure today?

Hyderabad is actually a very big fit for a corridor in South India — it's the eastern spine for the southern Deccan. Think of it as a peninsula play: a big node connecting a landlocked region to the ports, linking Hyderabad's consumption and manufacturing base to the east coast. Today the flow is predominantly road-based and very fragmented — one or two units here, one or two there, nothing co-located.

Over the next five to ten years I expect that to change. First, containerisation will rise sharply once ICD facilities and the logistics infrastructure that's currently missing come up — that includes containerisation of domestic cargo like foodgrains, wheat, granite, stone and steel, all of which are dominant in eastern Telangana. Second, rail's modal share will increase, so railway earnings should start doubling, and with the line itself being doubled, traffic handling will be smoother and faster. Third, the aggregation base — which today sits on the western side because of the

natural trade flow to JNPT — will shift east as well. We'll see multiple aggregation hubs in key production and consumption areas, and that's essentially what we're trying to build at Chityal.

On policy: the Telangana government is pushing hard for logistics infrastructure, but by the LEADS (Logistics Ease Across Different States) report, it's still behind states like Haryana and Delhi-NCR, which are far more robust. Telangana is learning from them, and I think that gap will close.

MMLPs elsewhere in the country have often underperformed or stayed underused. What structural shifts are needed to move from a warehousing-led model to a truly integrated multimodal logistics ecosystem?

There's a basic misunderstanding between investors and developers here. Warehousing is typically a real estate game. Multimodal logistics is not — it needs someone who understands the business of moving goods from one place to another and providing value-added services around it. That's a completely different skill set, and it's one of the reasons many MMLPs across India aren't fully operational: they're being developed by real estate players, and the operating mindset that multimodal logistics demands just isn't there. A few structural shifts need to happen.

One is aligning rail-adjacent industrial land parcels — the Telangana government is actually working on this; two weeks after our first industry conference, I was called in to help think through a similar facility for another logistics-industrial project the state was building. Second, securing the right regulatory licences: the government has been proactively



Mohit Agarwal

CEO, MPL Logistics Hub Private Limited



WAREHOUSING IS A REAL ESTATE GAME. MULTIMODAL LOGISTICS IS A DIFFERENT GAME ALTOGETHER — IT'S ABOUT THROUGHPUT, VOLUME AND HOW EFFICIENTLY YOU MOVE CARGO FROM ONE PLACE TO ANOTHER.

helping us pursue our ICD licence, and we've signed an MoU with the state for a multimodal logistics park worth roughly ₹700 crore over the next five years. It took time for that file to move through Delhi, but it happened, and it adds real weight to our proposal. Telangana is a naturally viable location — it



connects to both the eastern and western ports, and land here is cheaper than in the west, which matters because land cost is what makes or breaks the viability of an industrial or warehousing project. The government is also now aligning new industrial land allocations alongside railway infrastructure, which will bring logistics costs down further.

Eastern Telangana is dominated by agriculture and MSMEs. How critical is integrated infrastructure — cold chain, ICDs — to unlocking supply chain efficiencies there?

Telangana is dominated by agricultural exports, much like Punjab — a lot of rice and wheat moves out of here, and today growers truck it hundreds of kilometres to Kakinada, Visakhapatnam or Chennai because there's no facility within even 100 kilometres, even within the state. That's why we set up at Chityal — we're in the rice bowl of Telangana, Nalgonda district, where the bulk of the state's rice is grown. Today, a small farmer has to go through a big aggregator, who trucks it to Kakinada and waits on vessel schedules — sailings there are infrequent, so cargo has to be aggregated in bulk before export. Cutting that distance and that dependency gives farmers real price realisation and removes a lot of middlemen from the chain. They're the backbone of India and deserve that. It's the same story on cold chains. Chillies and pharma cargo both need temperature control, and this region exports a few lakh tonnes of chillies a year without world-class cold storage — what exists is fragmented, over-utilised and below export standards.

With ports and existing ICDs facing rising congestion, how can inland logistics hubs help reshape cargo movement out of Hyderabad and Telangana?

Dry ports and ICDs were designed precisely to decongest ports — you move the processing inland, and containers go straight to the ship's side. Telangana is actually export-oriented rather than import-oriented, so there's a structural imbalance: more containers going out than coming in, which makes container availability a real challenge.

Dry ports let shipping lines rebalance empty container inventory across multiple ports, which matters a great deal for a landlocked state. A lot of Hyderabad's export cargo travels 500–600 kilometres to Chennai, Mumbai or even Mundra. That's also where the sustainability case for rail comes in: Indian Railways has the largest rail network in the world, with close to 100% electrification — an advantage even China doesn't have.

Digitalisation and sustainability keep coming up as the defining themes right now. From your seat as CEO, what capabilities are becoming decisive for a customer choosing a logistics partner?

Digitalisation isn't the future anymore, it's the present — companies that don't invest in it aren't going to get anywhere.

In logistics specifically, visibility is the whole game. Customers want to know where their cargo started, where it's stopped, when it's expected to reach the destination, and when it'll be delivered — the same reassurance you'd

want tracking a parcel. Rail actually gives you more of that: you can track a wagon movement much like you'd track a PNR. These are now baseline expectations — any large multinational you want to work with requires this level of digitalisation, alongside ESG commitments. As we build out Chityal, we're layering in solar power for the warehouses, and we're seeing a real uptick in EV trucks over the last six months as fuel costs have risen. We're also targeting IGBC Gold certification for the logistics park as part of that push.

What's the story behind Chityal, and what should customers expect?

Chityal began as a captive-cargo project on land we own along the South Central Railway line, serving Telangana and parts of Andhra Pradesh — we've since built 2km of rail siding and hold a large land bank for phased expansion (warehousing, industrial units, an ICD, open yards, cold storage, and customs bonding).

The location was cost-efficient, but Railways' 2022 cargo terminal policy, which landed mid-application, convinced us to open it up beyond our own cargo. Telangana lacks a facility of this scale, so we're building Chityal into that backbone — we've already moved 100+ rakes, with more capacity coming as the ICD and warehousing go live. Each phase is tied to real, convertible demand, so we're ready just ahead of need. It's built for customers who want a genuine ICD, customs bonding, and cold storage together — not just warehouse space. 



INDIA CONSOLIDATES GLOBAL LEAD IN GREEN SHIP RECYCLING

India's share of the global ship recycling market rose to 35.4% in 2025, years ahead of its Maritime India Vision 2030 target, as the government moves to expand Alang and link recycling credits to domestic shipbuilding

Ramprasad Ravi

India has officially claimed the top spot as the world's leading nation for ship recycling. According to the latest data released by the United Nations Conference on Trade and Development (UNCTAD), India expanded its global market share to a commanding 35.4% in 2025, up from 30.1% the previous year.

With this milestone achieved years ahead of schedule, the Indian government is now setting its sights on a much bigger goal: transforming the country into the absolute global hub for "green" and sustainable ship recycling, while directly

linking this success to a domestic shipbuilding boom.

A Massive Jump in Numbers

The report reveals that the volume of ships recycled in India witnessed a massive surge, reaching 2.99 million gross tonnes (GT). This represents a nearly 60% increase from the 1.86 million GT recorded previously. By reaching this top position, India has successfully fulfilled a core target of its Maritime India Vision (MIV) 2030 well before the decade's end.

Union Minister for Ports, Shipping, and Waterways, Sarbananda Sonowal, praised

India's Ship Recycling Milestones at a Glance

Metric	Figure
Global market share, 2025	35.40%
Global market share, 2024	30.10%
Volume recycled, 2025	2.99 million GT
Volume recycled, prior year	1.86 million GT (~60% increase)
Compliant recycling facilities	115
Government support for yard upgrades	₹53+ crore
Planned Alang capacity expansion	~9 million LDT (nearly double current capacity)
Global ships needing recycling (next 10 yrs, BIMCO est.)	16,000+ vessels
India's targeted annual share of that demand	500-600 ships/year
Ship-breaking credit note value	40% of scrap value
Credit usable toward new-build cost	Up to 5% of new vessel cost

The Ship-breaking Credit Note Scheme creates a sustainable circular economy loop, where old steel is directly reused to fuel the domestic manufacturing of modern, green vessels.

the milestone, stating that India's emergence as the top ship recycling nation reflects the success of sustained policy reforms, joint industry efforts, and strict compliance with global environmental and safety rules. He emphasised that the achievement firmly establishes India as a responsible global hub for sustainable maritime practices.

The Shift to "Green" Recycling

For decades, ship-breaking was criticised globally due to environmental pollution and hazardous working conditions.

However, India has completely changed its approach by shifting toward eco-friendly or "green" ship recycling. The turning point came with the enforcement of the Recycling of Ships Act and India's subsequent ratification of the Hong Kong International Convention, a global agreement aimed at ensuring that ships, when being recycled after reaching the end of their operational lives, do not pose unnecessary risks to human health or the environment.

To bring this vision to life, the Indian government provided over ₹53 crore in financial assistance to upgrade domestic ship-breaking yards. Because of these investments, 115 recycling facilities in India are now fully compliant with international safety and environmental standards. The country is also actively working to get its yards included in the European Union's (EU) approved list of ship recycling facilities, which would open the door to recycling high-value European vessels.

The Alang Expansion Plan

At the heart of India's ship recy-

cling sector is Alang in Gujarat, already recognised as the world's largest ship-breaking yard. To capitalise on its newfound global leadership, the government has prepared a master plan to expand Alang's infrastructure. The expansion aims to nearly double India's current capacity, taking it to approximately 9 million Light Displacement Tons (LDT). The timing is strategic: the Baltic and International Maritime Council (BIMCO) estimates that more than 16,000 vessels will need to be recycled worldwide over the next ten years. With its current market dominance, India is positioned to dismantle and recycle 500 to 600 of these vessels every year.

Linking Recycling to New Shipbuilding

India is not just focusing on tearing old ships apart; it is using the scrap metal to build new vessels. The government has introduced an innovative Ship-breaking Credit Note Scheme to support its long-term goals under the Maritime Amrit Kaal Vision 2047, which aims to place India among the top five shipbuilding nations globally by 2047.

Under this scheme, ship owners who recycle their old vessels in India receive a credit note worth 40% of the ship's scrap value. Owners can then use this credit, up to 5% of a new vessel's total cost, to finance the construction of a brand-new ship at an Indian shipyard. This creates a sustainable circular economy loop, where old steel is directly reused to fuel the domestic manufacturing of modern, green vessels.

Driving Next-Generation Maritime Growth

While challenges remain, such as high interest rates for capital and a reliance on imported specialised marine components, the government is pushing forward by embracing next-generation green technology. Initiatives



India's emergence as the top ship recycling nation reflects the success of sustained policy reforms, joint industry efforts, and strict compliance with global environmental and safety rules.



Sarbananda Sonowal,

Union Minister for Ports, Shipping and Waterways

like the Green Tug Transition Programme are pushing domestic shipyards to build vessels powered by alternative fuels like hydrogen fuel cells, methanol, and electric batteries.

By prioritising worker safety, environmental protection, and financial incentives that bridge recycling with new construction, India is setting a new global benchmark for the maritime industry. The nation is no longer just a destination for old ships; it is shaping up to be the green engine of the global maritime future. 



India's Oil Shock Quarter

The Numbers Behind the Resilience

Maritime Gateway Research Bureau

India's April-June 2026 crude oil and petroleum products trade tells two stories at once. The headline data shows falling volumes and a shrinking trade base. The underlying data shows an energy system that absorbed history's costliest oil shock without breaking. Reading the two together reveals more about India's energy security than either does alone.

The Volume-Value Divergence Is the Real Story

Crude oil imports fell in volume terms to 58.12 MMT for the quarter, yet the cost of securing those barrels reached levels never before recorded, with landed crude averaging 113 dollars a barrel during the Strait of Hormuz disruption. This divergence between falling volumes and record costs is the single most important number in this report. It means Indian refiners were not simply paying more for the same oil. They were actively rationing intake while prices spiked, a defensive posture rather than business as usual.

That rationing shows up again in refining. Total crude processed in June rose only marginally against the previous year, even though installed capacity across India's refineries stands at 267.1 MMT against a quarterly

throughput of just 65.7 MMT. Refiners had substantial spare capacity available and chose not to use it aggressively. That is a system managing risk, not one straining at its limits.

Russia's Discount Became India's Shock Absorber

The clearest structural shift in the quarter is the scale of Russian crude in India's import basket. Russia supplied 21.95 MMT, more than the next four supplying countries combined, and Russian crude purchases climbed 34 percent month-on-month in June to a record 5.14 billion dollars, making India the world's second-largest buyer of Russian fossil fuels that month.

This is not incidental. When Hormuz-linked volatility hit Gulf spot prices hardest, the discounted Russian barrel became the mechanism that kept India's refining system supplied without forcing an even sharper cut in throughput. The UAE, Saudi Arabia and Oman together supplied barely half of what Russia alone delivered. For an economy that remains 88.5 percent dependent on imported crude, that concentration in a single discounted source is both the reason the shock was manageable and a new vulnerability worth watching once Russian barrel discounts eventually narrow.

Exports Fell Faster Than Imports, and That Matters

Petroleum product exports dropped 24.7 percent for the quarter, a steeper decline than the fall in crude imports. Read alongside a 41.1 percent quarterly contraction in product imports, the pattern points to refiners prioritising the domestic market over export margins during the price spike. Reliance Industries, India's largest single product exporter at 9.34 MMT, and the broader export complex at Sikkha effectively pulled back from the international arbitrage trade to keep more refined output at home.

This matters because it shows Indian refining capacity functioning as intended during a supply shock: as a buffer for domestic consumption first, and an export platform second. Diesel and petrol consumption both grew even as overall product demand slipped 5 percent, indicating that core transport fuel demand was insulated from the volatility while discretionary and industrial products such as LPG, naphtha and bitumen absorbed the pullback.

The product mix itself shifted in June, with refined output of 22.5 MMT down 4 percent year-on-year and high-speed diesel account-

Petroleum product exports dropped 24.7 percent for the quarter, a steeper decline than the fall in crude imports. Read alongside a 41.1 percent quarterly contraction in product imports, the pattern points to refiners prioritising the domestic market over export margins during the price spike.

ing for 43 percent of production, followed by motor spirit/petrol at 18.7 percent, naphtha at 6.2 percent, LPG at 6.6 percent, aviation turbine fuel at 5.1 percent, and pet coke at 4.5 percent. On the consumption side, the quarter's 5 percent overall decline broke down unevenly: diesel consumption rose 2.8 percent, petrol 5.8 percent, and ATF 0.3 percent, while LPG, naphtha, bitumen and other products dragged the total down. June alone saw consumption fall 3.1 percent year-on-year, with LPG down 14.3 percent, bitumen down 18.4 percent, and naphtha down a steep 42.8 percent, the clearest sign yet of which products absorbed the demand pullback. Sikka's dominance extended to exports as well, handling 8.76 MMT for the quarter, more than eight times the volume of the next-largest port, while declines in product shipments were concentrated in motor spirit, high-speed diesel and naphtha. On the import side, Abu Dhabi National Oil Company (4.98 MMT) and Venezuela's PDVSA (2.73 MMT) were among the leading counterparties, while Indian Oil Corporation (19.64 MMT) and Reliance Industries (17.51 MMT) led product imports.

The Fiscal Arithmetic Behind Price Stability

The government's intervention was direct and costly. A 10 rupee per litre excise cut combined with a 76-day retail price freeze kept CPI inflation below 4 percent, but at a price: 2,400 crore rupees a day in losses for state oil marketing companies and roughly 12 billion dollars in foregone exchequer revenue. The rupee still slid nearly 5 percent to 93 against the dollar, requiring the RBI to

deploy 46 billion dollars in reserves. What stands out is what did not move. GDP growth held at 7.7 percent and manufacturing growth at 10.7 percent through the quarter. A shock of this magnitude, landing on an economy this import-dependent, would historically have shown up in growth numbers within a quarter. That it did not suggests the fiscal buffers, industrial gas rationing and the 25 percent mandated increase in domestic LPG output worked as intended, transferring the cost to the exchequer and reserves rather than to households or output.

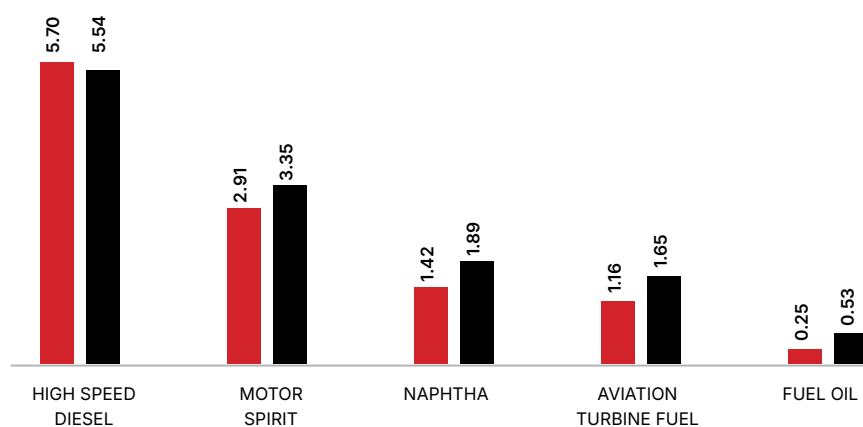
The rationing measures behind that LPG push were more specific than the headline figure suggests: authorities capped fertiliser plant gas allocations at 70 percent of normal supply and directed the extra domestic LPG output toward protecting the country's 332 million residential LPG connections, effectively shielding households from the industrial-side rationing entirely.

The Structural Hedge Is Already Paying Off

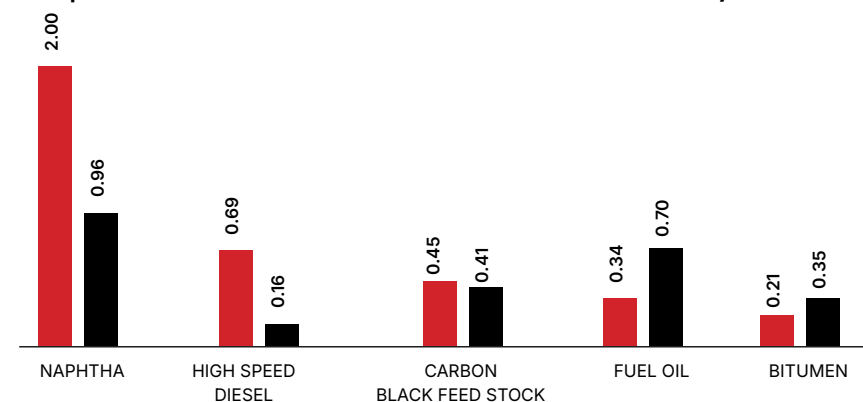
That non-fossil base breaks down as 162.15 GW of solar, 57.44 GW of wind, 57.24 GW of hydro, and 8.78 GW of nuclear, solar alone now accounting for more than half of India's non-fossil generating capacity. The ethanol programme's benefits have also extended beyond forex savings: the same displacement of 310 lakh tonnes of crude is estimated to have cut around 930 lakh tonnes of carbon emissions since 2014-15, giving the structural hedge an emissions dimension alongside its balance-of-payments one.

The Hormuz quarter was a stress test. The data shows a system that passed it, but one that leaned heavily on two levers, discounted Russian crude and exchequer-funded price freezes, that both carry limits. The next disruption may not find both levers available at the same scale. 

Export traffic of POL Products from Indian Ports (Qty in MMT)

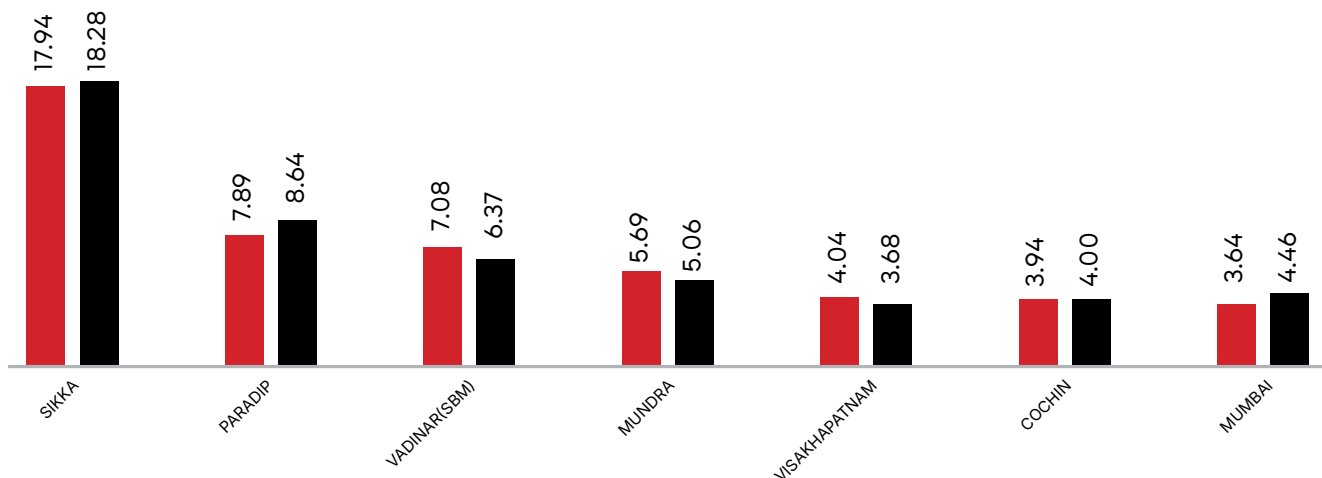


Import traffic of POL Products from Indian Ports (Qty in MMT)



Crude Oil

Imports of Crude Oil from top 7 Indian Ports (Qty in MMT)



Refinery-Wise Installed Capacity and Crude Throughput in India (MMTA)

Sr. no.	Refinery	Installed capacity	June'26	Apr'26-June'26
1	Barauni (1964)	6.0	0.5	1.6
2	Koyali (1965)	13.7	1.4	4.3
3	Haldia (1975)	8.0	0.7	2.2
4	Mathura (1982)	8.0	0.5	2.2
5	Panipat (1998)	15.0	1.3	3.9
6	Guwahati (1962)	1.2	0.1	0.3
7	Digboi (1901)	0.65	0.1	0.2
8	Bongaigaon(1979)	2.70	0.3	0.8
9	Paradip (2016)	15.0	1.2	3.7
OCL-TOTAL		70.3	6.1	19.2
10	Manali (1969)	10.5	0.9	2.8
11	CBR (1993)	0.0	0.0	0.0
CPCL-TOTAL		10.5	0.9	2.8
12	Mumbai (1955)	12.0	1.2	3.8
13	Kochi (1966)	15.5	1.5	4.3
14	Bina (2011)	7.8	0.7	2.1
BPCL-TOTAL		35.3	3.4	10.2
15	Numaligarh (1999)	3.0	0.3	0.8
16	Tatipaka (2001)	0.07	0.006	0.01
17	MRPL-Mangalore (1996)	15.0	1.4	4.3
ONGC-TOTAL		15.1	1.4	4.3
18	Mumbai (1954)	9.5	0.9	2.5
19	Visakh (1957)	15.0	1.3	4.0
HPCL - TOTAL		24.5	2.2	6.5
20	HMEL-Bathinda (2012)	11.3	1.1	3.3
21	HRRL-Pachpadra (2026)	9.0	0.1	0.1
22	RIL Jamnagar (OTA) (1999)	33.0	2.2	6.8
23	RI -Jamnagar (SEZ) (2008)	35.2	3.1	8.9
24	NEL-Vadinar (2006)	20.0	1.4	2.7
All India (MMT)		267.1	22.3	65.7
All India (Million Bbl/ Day)		5.35	5.44	5.29



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