

भारत के पत्तन क्षेत्र का अद्यतन

UPDATE ON INDIAN PORT SECTOR

(31.03.2015)



परिवहन अनुसंधान प्रभाग
TRANSPORT RESEARCH WING
सडक परिवहन तथा राजमार्ग मंत्रालय
MINISTRY OF ROAD TRANSPORT & HIGHWAYS
भारत सरकार
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NEW DELHI

राजीव कुमार
RAJIVE KUMAR

Tel. : 23714938
Fax : 23716656



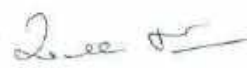
सचिव
पोत परिवहन मंत्रालय
भारत सरकार
परिवहन भवन, 1, संसद मार्ग
नई दिल्ली-110001
SECRETARY
MINISTRY OF SHIPPING
GOVERNMENT OF INDIA
Transport Bhawan, 1, Parliament Street,
New Delhi-110001

PREFACE

As per the decision of the Maritime State Development Council, the Transport Research Wing in the Ministry of Shipping, Road Transport and Highways has been bringing out the biannual publication "*Update on Indian Port Sector*". Present issue (upto March, 2015) is twenty-fifth in the series of the publication "*Update on Indian Port Sector*". The last issue contained data up to September, 2014.

The current issue of the "*Update on Indian Port Sector*" includes the information on the performance of Major and Non-Major Ports for the period up to end of March, 2015. The list of private sector/captive/joint sector port projects under implementation/consideration at Major Ports and Non-Major Ports have also been included. The cooperation extended by the concerned source authorities is gratefully acknowledged.

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(Rajive Kumar)

Officers associated with this publication

Mr. Ashish Kumar
Senior Adviser (TR)

Mr. M.M. Hasija
Adviser (Statistics)

Mrs Anupam Bhatnagar
Director

Mr. Basant Kumar
Deputy Director

Mr. Jagdish Chand
Senior Statistical Officer

Ms. Savita Mittal
Economic Officer

Mr. Gopal Yadav
Junior Statistical Officer

UPDATE ON INDIAN PORT SECTOR

(UP TO 31.03.2015)

C O N T E N T S

Section No.	Subject	Page No.
1	Recent Trends in Cargo Traffic and Policy Initiatives	1-25
2	Policy and Performance of Maritime States	26-36
3	Efficiency Indicators of Major Ports	37-41
4	Private Sector/Captive/Joint Sector Port Projects	42-60
ANNEXURES		
I	Plan Outlay and Expenditure – Port Sector (Central Sector)	61
II	Commodity-wise Traffic Handled at Major Ports	62
III	Commodity Composition of Traffic Handled at Non-Major Ports	63
IV	Commodity-wise Capacity of Major Ports	64

1. RECENT TRENDS IN CARGO TRAFFIC AND POLICY INITIATIVES

1. International and Domestic Factors Related to Seaborne Trade.

1.1.1 Global growth in 2014 was a modest 3.4 percent, reflecting a pickup in growth in advanced economies relative to the previous year and a slowdown in emerging market and developing economies. Despite the slowdown, emerging market and developing economies still accounted for three-fourths of global growth in 2014. Complex forces that affected global activity in 2014 are still shaping the outlook. These include medium- and long-term trends, such as population aging and declining potential growth; global shocks, such as lower oil prices; and many country- or region-specific factors, such as crisis legacies and exchange rate swings triggered by actual and expected changes in monetary policies. Overall, global growth is projected to reach 3.5 percent and 3.8 percent in 2015 and 2016, respectively

1.1.2 Growth is projected to be stronger in 2015 relative to 2014 in advanced economies, but weaker in emerging markets, reflecting more subdued prospects for some large emerging market economies and oil exporters.

1.1.3 Growth in emerging markets is expected to pick up in 2016, driving an increase in global growth to 3.8 percent, mostly reflecting some waning of downward pressures on activity in countries and regions with weak growth in 2015, such as Russia, Brazil, and the rest of Latin America.

1.1.4 In many emerging market and developing economies, macroeconomic policy space to support growth remains limited. In oil importers, however, lower oil prices will reduce inflation pressure and external vulnerabilities, and in economies with oil subsidies, the lower prices may provide some fiscal space or, where needed, scope to strengthen fiscal positions.

1.1.5 Growth in Advanced economies are generally benefiting from lower oil prices. Growth in the United States is projected to exceed 3 percent in 2015-16, with domestic demand supported by lower oil prices, more moderate fiscal adjustment, and continued support from an accommodative monetary policy stance, despite the projected gradual rise in interest rates and some drag on net exports from recent dollar appreciation.

1.1.6 Table 1 gives the growth of cargo at Indian ports and related parameters of Indian and world trade.

Table 1: Growth in Cargo handled at Indian Ports and related parameters (in %)						
Parameters	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15
Trends in India's Select : Macro Parameters						
I. Total Cargo	14.2	4.2	3.2	2.2	4.1	8.2
(a) Major Ports	5.7	1.6	-1.7	-2.6	1.8	4.7
(b) Non Major Ports	35.5	9.1	12.2	9.7	8.3	13.0
II. GVA overall	n.a.	n.a.	n.a.	n.a.	6.6	7.2
(a) Agriculture	n.a.	n.a.	n.a.	n.a.	3.7	0.2
(b) Industry	n.a.	n.a.	n.a.	n.a.	4.5	6.1
(c) Services	n.a.	n.a.	n.a.	n.a.	9.1	10.2
III. Foreign Trade						
(a) Export in \$ value	-3.5	40.5	21.8	-1.8	4.7	-1.23
(b) Import in \$ value	-5	28.2	32.3	0.3	-8.3	-0.59
Trends in Select : Global Indicators						
IV. World Output	0	5.4	4.2	3.4	3.4	3.4
(a) Advanced Economies	-3.4	3.1	1.7	1.2	1.4	1.8
(b) Developing Economies	3.1	7.4	6.2	5.2	5.0	4.6
V. World Economic Growth	-2.2	4.1	2.8	2.3	2.3	2.7F
(a) Advanced Economies	-3.8	2.6	1.4	1.1	1.3	1.8F
(b) Developing Economies	2.4	7.9	6.0	4.7	4.6	4.7F
(c) Transition Economies	-6.6	4.5	4.7	3.3	2.0	1.3F
VI. World Trade Volume (Goods)	-12.0	14.3	6.9	2.5	3.1	3.0
VII. Export Volume growth (Goods)						
(a) Advanced Economies	-13.7	14.8	6.2	1.4	2.6	2.9
(b) Developing Economies	-8.2	14.4	7.5	4.9	4.5	3.5
VIII. Import Volume (Goods)						
(a) Advanced Economies	-13.7	13.5	5.4	0.1	1.7	2.5
(b) Developing Economies	-9.3	14.9	10.4	6.0	4.9	3.6
IX. World Seaborne Trade*	-5.0	7.4	4.3	4.6	3.6	3.0
(a) Goods Loaded	-4.5	7	4.5	4.7	3.8	NA
(b) Goods Unloaded	-5.5	7.8	4.2	4.4	3.4	NA
<p>I. Based on data from Major Ports and Non Major Ports</p> <p>II. Figures -2013-14 & 2014-15 based on Press Release of Gross Value Added (GVA) at Factor Cost (2011-12 Prices), Central Statistical Organization; dated 30th May, 2015. Comparable figures for the back series are not available.</p> <p>III. Based on Department of Commerce, DGCI&S and RBI Bulletin</p> <p>IV, VI, VII & VIII Based on World Economic Outlook, April, 2015 IMF</p> <p>V & IX. Based on Review of Maritime Transport, 2014(November), UNCTAD</p> <p>Note : MT: Million Tonnes; For item Nos IV, VI, VII & VIII year 2009-10 refers to calendar year 2009 and so on; F refers to forecast for 2014.</p> <p>* growth in total goods loaded plus unloaded; NA ; Not Available (P) Provisional</p>						

Selected Emerging Trends Affecting Seaborne Trade

1.1.7 The performance of world seaborne trade in 2013 was shaped by various trends, including a more balanced growth in demand (trade), a continued persistent oversupply in the world fleet across the various market segments relatively high bunker price levels, as well as a wider use of slow steaming, especially in the container-ship sector. Volumes expanded at the slower rate of 3.8 per cent, taking the total to nearly 9.6 billion tonnes. Of these shipments, dry cargo (major and minor dry commodities carried in bulk, general cargo, breakbulk and containerized trade) accounted for the largest share (70.2 per cent), followed by tanker trade (crude oil, petroleum product and gas) which held a 29.8 per cent share. Much of the expansion in 2013 continued to be driven by growth in dry-cargo flows which grew by 5.5 per cent to reach 6.7 billion tonnes.

1.1.8 While in 2013 economic growth decelerated in developing countries, they nevertheless continued to contribute larger shares to international seaborne trade. Their contribution in terms of global goods loaded increased to 61 per cent up from 60 per cent in 2012, while their import demand as measured by the volume of goods unloaded reached 60 per cent up from 58 per cent in 2012. The shares of goods loaded and unloaded in developing countries have become almost on a par in recent years.

1.1.9 Asia remained the main loading and unloading area in 2013 with its share of imports (unloading) being particularly dominant. Other major loading areas were, in descending order, the Americas, Europe, Oceania and Africa. On the unloading side, the other regions with the largest shares, besides Asia, in ascending order were Europe, the Americas, Africa and Oceania. These shares are likely to further evolve with changing trade patterns and partners, the emergence of Africa and developing America as areas with a significant growth potential, and fast growing trade on secondary container trade routes supporting South South and intraregional trade.

Table 2 : Developments in International Seaborne Trade (Million Tonnes)				
Year	Oil	Main Bulk#	Other Dry Cargo	Total
2000	2163	1295	2526	5984
2006	2698	1814	3188	7700
2007	2747	1953	3334	8034
2008	2742	2065	3422	8229
2009	2642	2085	3131	7858
2010	2772	2335	3302	8409
2011	2794	2486	3505	8784
2012	2841	2742	3614	9197
2013	2844	2920	3784	9548
# iron ore, grain, coal, bauxite/alumina and phosphate. Source: Review of Maritime Transport, 2014, UNCTAD				

Crude Oil and Petroleum products

1.1.10 Global crude oil shipments fell by 1.7 per cent in 2013 with total volumes averaging 1.8 billion tonnes. Factors at play included the supply and demand dynamics resulting from geopolitical disruptions, growing domestic production in the traditionally largest consumer market, as well as the overall weak global economic conditions and constrained demand. Weaker demand for imported crude oil in the United States and refinery closures in Europe contributed significantly to the decline. Main unloading ports or importing areas were located in Japan, North America, Europe and developing Asia. Crude oil imports into the United States fell by 13 per cent from 7.7 million to 6.7 million barrels per day (bpd) (British Petroleum, 2014), the lowest level recorded for more than two decades. Imports also fell in Canada and Japan. Elsewhere, China's seaborne crude imports increased by 6.8 per cent reaching 7.7 million bpd and therefore surpassing the United States as the world's largest net oil importer. Other importers, including Africa, developing America, Australia, Europe, India and Singapore have all increased their crude oil imports, although at different rates. Imports into Asia reflect growing consumption needs but also efforts by countries in the region, including China and India, to build local refineries.

1.1.11 Major crude oil loading areas continued to be located in Western Asia, Africa, developing America and the transition economies. Almost all major crude oil exporters reduced their exports or matched the 2012 levels. While Canada increased its crude oil shipments in 2013 (8.6 per cent), others, including developing America, Western Asia, the transition economies and Africa have seen their exports constrained.

1.1.12 In 2013, oil product shipments increased by 4.7 per cent, compensating to some extent for the drop in crude oil shipments. Estimates by UNCTAD suggest that world oil product shipments, including gas trade, have increased by 3.1 per cent from 1.06 billion tonnes in 2012 to 1.09 billion tonnes in 2013, driven in particular by growing export volumes from the United States (+18.5 per cent in 2013). As the surplus crude oil volumes produced in the United States could not be exported, refineries in the country are processing the crude with a view to oil product exports. In 2013, China, the economies in transition, Europe,

Singapore and Western Asia increased their shipments, while in some regions exports either contracted (Africa, developing America and India) or came to a standstill (Canada).

Dry-cargo Bulks:

1.1.13 Dry-bulk commodities are the backbone of international seaborne trade, reflecting, in particular, the fast growing demand from emerging developing regions. In 2013, world dry-cargo shipments reached 6.7 billion tonnes, a 5.5 per cent growth over 2012. The dry-bulks trade increased by 5.6 per cent and accounted for 64.6 per cent of global dry-cargo volumes. Of this total, the five major dry bulks totalled about 2.9 billion tonnes while minor dry bulks reached 1.4 billion tonnes. The five major dry bulk commodities continued to drive growth in this market segment rising by 6.5 per cent in 2013 as compared with 3.5 per cent in 2012.

Coal

1.1.14 In 2013, the total volume of coal shipments (thermal and coking) increased by 5.0 per cent to reach 1.18 billion tonnes. Accounting for nearly 78.0 per cent of the coal trade, thermal shipments increased by 2.9 per cent, a rate much slower than the 14.6 per cent recorded in 2012. Asian imports are the main contributor to global coal trade with volumes expanding rapidly over recent years. Asia's thermal coal import volumes recorded the fastest growth (5.3 per cent) while import volumes into the European Union contracted by 5.9 per cent. Major importers included China, Germany, India, Japan, Malaysia, the Republic of Korea, Taiwan Province of China and the United Kingdom.

Iron ore shipments and steel production and consumption

1.1.15 Reflecting continued growth in the steel industry, global iron-ore trade increased by 7.1 per cent with volumes doubling between 2004 and 2013. Iron-ore shipments totalled nearly 1.2 billion tonnes in 2013 up from 1.1 billion tonnes in 2012 and 593 million tonnes in 2004. Major iron-ore exporters were Australia and Brazil, which together accounted for 75.6 per cent of world iron-ore shipments in 2013. However, other smaller suppliers are increasingly emerging as important markets that can offer promising prospects for shipping, especially in Africa. In 2013, while the majority of dry-bulk exports were shipped from South Africa, other African countries have also been contributing larger shares. These include iron-ore exporters from Liberia and Sierra Leone and coal exports from Mozambique. Expansion of coal and iron ore mining capacity, including in Guinea, are likely to significantly increase dry-bulk cargo volumes shipped out from Africa. India's iron-ore exports declined while its import demand for dry-bulk commodities generally continues

to grow. Being the fourth largest steel producer worldwide, India is also increasingly importing coking coal, a trend set to continue in the coming years due to the planned increase in steelmaking capacity.

Dry cargo: Minor bulks

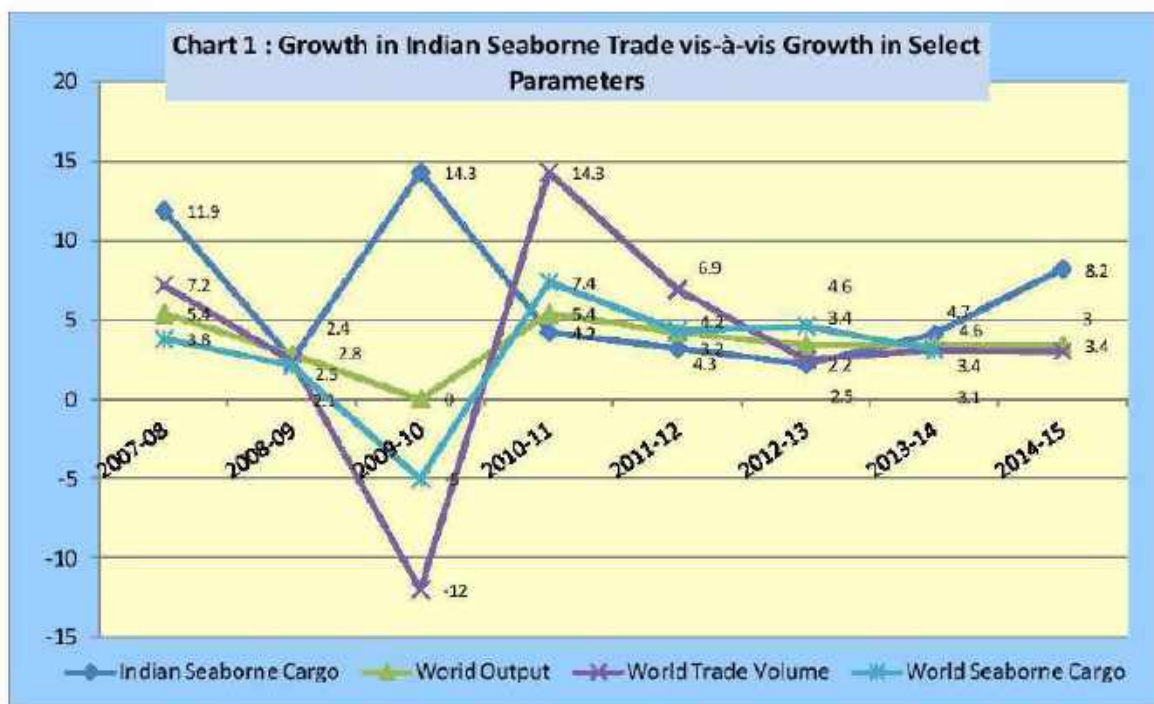
1.1.16 In 2013, growth in minor-bulks trade decelerated to 3.9 per cent (Clarkson Research Services, 2014), with total volumes averaging 1.4 billion tonnes. Of this total, 44 per cent was accounted for by metals and minerals (for example, cement, nickel ore, anthracite), 34 per cent by manufactures (that is, forest and steel products) and 21.9 per cent by agribulks (for example, sugar). Metals and minerals recorded the fastest growth (6 per cent) followed by manufactures (3.7 per cent) and agribulks, which remained flat owing to reduced oilseed/meal trade and limited sugar-trade growth.

Other dry cargo: Containerized trade

1.1.17 Global containerized trade grew by 4.6 per cent in 2013 taking total volumes to 160 million TEUs, up from 153 million TEUs in 2012. Overall, containerized trade flows in 2013 unfolded in the context of (a) further cascading of larger tonnage down from the main lanes to smaller and secondary routes, (b) greater uptake of slow steaming which started in 2007 in response to a rapid increase in bunker prices with a view to address capacity oversupply, and (c) continued efforts to build alliances. Building shipping alliances, in particular, is becoming an important strategy for ship owners to control costs and maximize capacity utilization on larger ships, as illustrated by the alliance building activity and service-cooperation agreements between carriers in 2013.

1.2 India: Seaborne Cargo Traffic

1.2.1 The growth in India's Port traffic and growth in World output, export volume and seaborne trade (loadings and unloading) since 2007-08 is given in **Chart I**.



1.3 Cargo Traffic at Indian Ports

1.3.1 During 2014-15, Major and Non-major Ports in India have accomplished a total cargo throughput of 1052.52 tonnes reflecting a modest increase of 8.2% over 2013-14 compared to a growth of 4.1 % in the previous year. The growth in cargo handled at Major and Non-major ports in 2014-15 were 4.7% and 13.0% respectively compared to 1.8% and 7.5% achieved in 2013-14.

1.3.2 Growth in advanced economies which are a major market for Indian merchandise trade has gradually increased from 1.4% in 2013 to 1.8% for 2014. India's Gross Value Addition (GVA) at constant prices (Base year 2011-12) exhibited a growth of 7.2% in 2014-15 as against 6.6% in 2013-14. Series of judicial interventions leading to ban/restrictions on iron ore exports resulted in decline in its export. In spite of the challenges, port sector has doubled the growth over the previous year.

1.3.3 The growth in India's Port traffic and growth in world output, world trade volume and world seaborne trade (loadings and unloading) since 2007-08 is given in **Chart 1** above. Trend in traffic handled at Major and Non-major Ports is given below in **Table 3**.

Table 3- Traffic Handled at Indian Ports								
	(Million Tonnes)							
Major/Non-Major	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15
Major Ports	519.31	530.80 2.2	561.09 5.7	570.09 1.6	580.19 -1.7	545.83 -2.6	555.49 1.8	581.33 4.7
Non-Major Ports	206.38	213.22 3.3	288.94 35.5	315.36 9.1	353.74 12.2	387.92 9.7	416.97 7.5	471.19 13.0
All Ports	725.69	744.02 2.5	850.03 14.2	885.45 4.2	913.93 3.2	933.75 2.2	972.46 4.1	1052.52 8.2

1.4 Cargo Traffic at Major Ports

1.4.1 The volume of seaborne cargo traffic handled by ports is mainly shaped by the levels and changes in both the global and domestic activity. Cargo traffic at India's 12 major ports during 2014-15 at 581.33 million tonnes increased by 4.7% compared with 555.49 million tonnes handled in 2013-14.

1.4.2 The year 2014-15 witnessed an increase in total cargo traffic of 4.7% over the preceding year and a shortfall with respect to the target set for 2014-15 by 3.8% (Table-4). Some of the events which impacted major ports in achieving the targeted growth were slower growth in European Union of 0.9% only in 2014 and negative growth of Japan. Judicial interventions resulting in continuous ban of Iron Ore mining impacted its exports. In 2014-15, major ports handled 16.6 million tonnes of Iron ore cargo which was 8.0 million tonnes lower than that achieved in 2013-14.

Table :4: Annual Cargo Traffic Targets and Actual Cargo traffic handled during 2014-15 (MillionTonnes)				
S.No.	Name of Ports	Cargo Traffic		Shortfall in Target Achievement (%)
		Target 2014-15	Actual 2014-15	
1	Kolkata Dock System	13.0	15.3	17.7
2	Haldia Dock Complex	34.5	31.0	-10.1
3	Paradip Port	68.0	71.0	4.4
4	Visakhapatnam Port	67.0	58.0	-13.4
5	Ennore Ports Limited(Kamarajar)	28.0	30.3	8.2
6	Chennai Port	55.0	52.5	-4.5
7	Tuticorin (Chidambaranar)	32.0	32.4	1.3
8	Cochin Port	23.6	21.6	-8.5
9	New Mangalore Port	42.0	36.6	-12.9
10	Mormugao Port	13.4	14.7	9.7
11	Mumbai Port	63.0	61.7	-2.1
12	Jawaharlal Nehru Port	65.0	63.8	-1.8
13	Kandla Port	100.0	92.5	-7.5
	Total	604.45	581.3	-3.8

1.4.3 During 2014-15, Mormugao recorded highest growth in traffic of 25.3% followed by Kolkata Dock System (18.7%), Chidambaranar (13.2%), Kamarajar (10.7%), Haldia Dock Complex (8.8%), Kandla (6.3%). Growth in traffic handled by Paradip, Mumbai, Cochin, Chennai and JNPT during 2014-15 over the previous year was less than 5% in each case. Major ports which recorded **negative growth** in traffic during 2014-15 were: NMPT (7.1%) and Visakhapatnam (0.9%).

1.4.4 Amongst the Major Ports, Kandla Port handled the maximum Cargo of 92.5 million tonnes with a share of 15.9% in total cargo handled at major ports followed by Paradip (12.2%), JNPT (11.0%), Mumbai (10.6%), Vishakhapatnam (10.0%), Chennai (9.0%), NMPT (6.3%), Chidambaranar (5.6%), Haldia Dock Complex (5.3%) and Kamarajar (5.2%). Cochin, Kolkata Dock System (KDS) and Mormugao each had a share of less than 5% in the total cargo handled by Major ports during 2014-15.

1.4.5 In terms of port performance, analysis of increase in cargo traffic during 2014-15 at 12 major ports reflects the fact that only four major ports were able to clock more than 10% growth namely Mormugao (25.3%), KDS (18.7%) Chidambaranar (13.2%) and Kamarajar (10.7%) (Table 5).

Table 5 : Traffic Handled at Major Ports							
(Thousand Tonnes)							
Ports	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15 (P)	% change 2014-15/ 2013-14
1	2	3	4	5	6	7	8
Kolkata	46423	47545	43248	39928	41386	46292	11.9
Kolkata DS	13045	12540	12233	11844	12875	15282	18.7
Haldia DC	33378	35005	31015	28084	28511	31010	8.8
Paradip	57011	56038	54254	56552	68003	71011	4.4
Vizag	65501	68041	67420	59038	58504	58004	-0.9
Ennore	10703	11009	14956	17885	27337	30251	10.7
Chennai	61057	61460	55707	53404	51105	52541	2.8
Tuticorin	23787	25727	28105	28260	28642	32414	13.2
Cochin	17429	17873	20090	19845	20886	21595	3.4
New Mangalore	35528	31550	32941	37036	39365	36566	-7.1
Mormugao	48847	50060	39049	17738	11739	14711	25.3
Mumbai	54541	54586	56186	58038	59184	61660	4.2
JNPT	60763	64317	65730	64488	62333	63801	2.4
Kandla	79500	81880	82501	93619	87005	92483	6.3
All Ports	561090	570086	560187	545831	555489	581329	4.7
(P): Provisional							

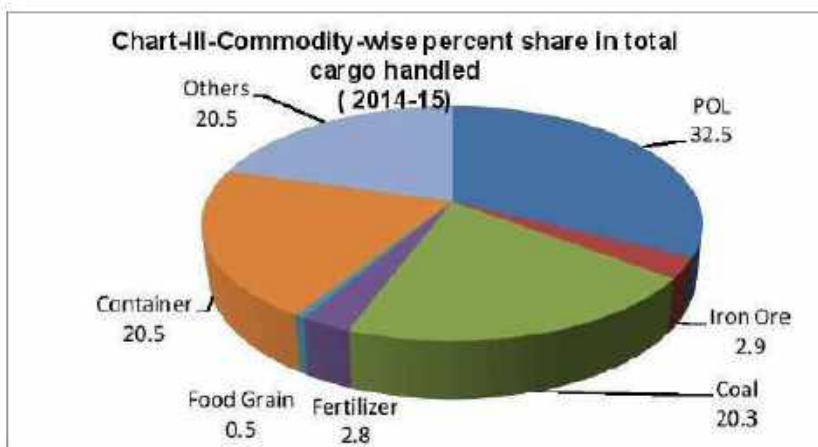
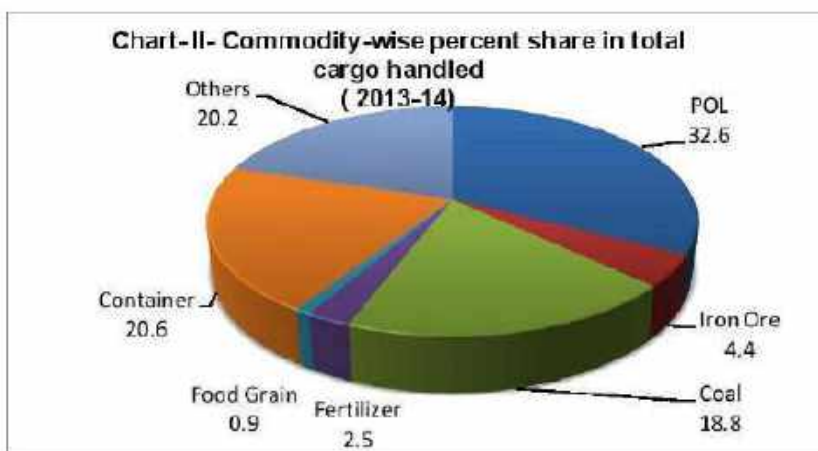
Commodity-wise growth of cargo traffic at Major Ports

1.4.6 At a broad commodity level (**Table-6**), during 2014-15, Fertilizers and FRM posted growth of 17.7%, followed by Coal (13.4%), Other Commodities (6.0%), POL (4.2%) and Container (4.2%) respectively. Cargo traffic in Iron ore was affected during April- March 2014-15 and dropped by 32.5%. The decline in Iron ore traffic is mainly attributed to restrictions in mining of iron ore.

1.4.7 In terms of composition of cargo traffic handled at major ports, the largest commodity group (with share in percent in total cargo handled) was POL (32.5%) followed by Other cargo (20.5%), Container traffic (20.5%), Coal (20.3%), Iron ore (2.9%), Fertilizer & FRM (2.8%) and Food Grain (0.5%).

Table 6 : Commodity wise Traffic Handled at Major Ports							
Commodities	(Thousand Tonnes)						
	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15(P)	% change 2014-15/ 2013-14
1	2	3	4	5	6	7	8
POL	174861	179882	173851	180725	181055	188743	4.2
Iron Ore	100892	87686	60719	27289	24616	16605	-32.5
Fertiliser	17731	20798	20404	14797	13784	16224	17.7
1. Finished	10941	12367	12218	7469	6149	7851	27.7
2. Raw (DRY)	6790	8431	8186	7328	7635	8373	9.7
Coal	71786	75146	78776	86804	104271	118194	13.4
1. Thermal Coal	43440	46145	51128	58772	71651	85287	19.0
2. Coking Coal	28346	29001	27648	28032	32620	32907	0.9
Food Grain	1196	1915	3279	6597	4796	3132	-34.7
Container (Tonnes)	101244	114158	120276	119866	114672	119441	4.2
Others	93380	90501	102882	109753	112295	118990	6.0
Total	561090	570086	560187	545831	555489	581329	4.7

1.4.8 The shares of different commodities in total cargo traffic during 2013-14 and 2014-15 are depicted in the **Charts II and III** respectively (on next page). Energy imports consisting of POL and Coal constituted about 53% of the total cargo traffic at India's major ports.



1.4.9 The Port-wise & commodity-wise traffic handled at major ports during 2010-11 to 2014-15 are given in **Annex -II**.

Table 7: Container Traffic at Major Ports (in thousand tonnes/TEUs)										
PORT	2011-12		2012-13		2013-14		2014-15(P)		% change 2014-15/ 2013-14	
	Tn	TEU	Tn	TEU	Tn	TEU	Tn	TEU	Tn	TEU
1	2	3	4	5	6	7	8	9	10	11
Kolkata DS	6818	317	6960	463	7063	449	8109	528	14.8	17.6
Haldia DC	2619	115	2869	137	2230	113	1957	102	-12.2	-9.7
Paradip	109	8	171	13	99	9	67	4	-32.3	-55.6
Vizag	4213	234	4554	247	4816	262	4373	248	-11.0	-5.3
Chennai	30076	1555	29708	1539	28330	1468	29945	1552	5.7	5.7
Ennore	0	0	0	0	0	0	0	0	0	0
Tuticorin	9227	477	9372	476	10129	508	11034	560	8.9	10.2
Cochin	4715	337	4807	335	4785	343	5246	388	9.6	6.7
New Mangalore	645	45	692	48	747	50	921	63	23.3	26.0
Mormugao	279	22	258	20	236	19	312	25	32.2	31.6
JNPT	58233	4317	57911	4259	55235	4162	58933	4487	3.1	7.3
Mumbai	551	56	829	58	449	41	544	45	21.2	9.8
Kandla	2791	168	1935	118	453	29	0	0	0	0
All Ports	120276	7651	119866	7714	114672	7453	119441	7960	4.2	6.8
Note: CP - Corresponding period of previous year; (P) - Provisional; Tn- tonnes; TEU - twenty foot equivalent unit										
Source: IPA										

1.4.10 Growth in container traffic (in million tonnes) which reflects largely trade in manufactures and components increased in 2014-15 by 4.2%. In terms of Twenty Foot Equivalent Units (TEUs), containers handled by Major Ports in 2014-15 recorded 6.8% increase compared to decline of 3.5% in 2013-14. Amongst the major ports, the ports at Paradip, Haldia DC, and Vishakhapatnam witnessed fall in container traffic. JNPT continues to be the leading container handling port in the country with a share of 47.7% in terms of tonnage and 56.1% in terms of TEUs in the total container traffic at major ports during 2014-15. (Table 7). Chennai port which handled about 25.1% of container cargo is the second largest container handling port.

1.5 Cargo Traffic at Non-Major Ports

1.5.1 Non major ports handled about 45% of total maritime freight traffic of the country during 2014-15.

1.5.2 Table 8 presents maritime state-wise share and growth of traffic handled at Non-major ports during 2009-10 to 2014-15.

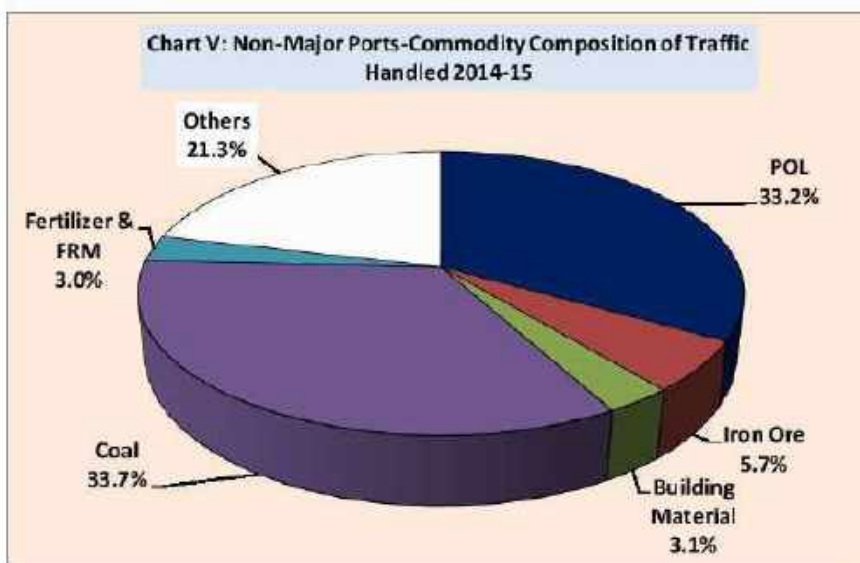
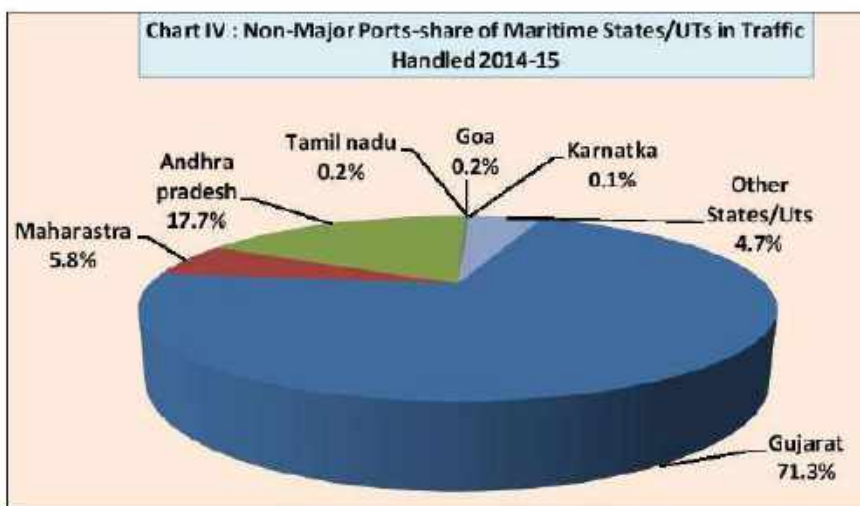
Table 8 : Traffic Handled by Non-Major Ports							(000 Tonnes)
Maritime State/UT	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15 (P)	% change 2014-15/ 2013-14
Gujarat	205583 (71.2)	230907 (73.2)	259050 (73.2)	287817 (74.2)	309945 (74.3)	336093 (71.3)	8.4
Maharashtra	12046 (4.2)	14875 (4.7)	19947 (5.6)	24198 (6.2)	24664 (5.9)	27295 (5.8)	10.7
Andhra Pradesh	43690 (15.1)	43267 (13.7)	45633 (12.9)	51811 (13.4)	58692 (14.1)	83444 (17.7)	42.2
Goa	13897 (4.8)	14581 (4.6)	14470 (4.1)	3389 (0.9)	284 (0.1)	760 (0.2)	167.6
Tamil Nadu	1174 (0.4)	1611 (0.5)	1210 (0.3)	933 (0.2)	866 (0.2)	825 (0.2)	-4.7
Karnataka	8547 (3.0)	3095 (1.0)	592 (0.2)	610 (0.2)	509 (0.1)	651 (0.1)	27.9
Other States/UTs	4000 (1.4)	7022 (2.2)	12843 (3.6)	19165 (4.9)	22010 (5.3)	22127 (4.7)	0.5
All Maritime States/UTs	288937 (100.0)	315358 (100.0)	353745 (100.0)	387923 (100.0)	416970 (100.0)	471195 (100.0)	13.0
Note: Figure in parenthesis is the percentage share of traffic handled by the maritime state to the total traffic handled by all the maritime states; P- Provisional							

1.5.3 The growth in cargo handled by the non-major ports in 2014-15 was 13.0% compared to 7.5% recorded in 2013-14. The growth in quantity of cargo handled at non-major ports has been primarily driven by growth in non-major ports in Gujarat and Andhra Pradesh. (Table 8). The growing importance of non-major ports in handling cargo traffic has helped alleviate the congestion at major ports. Table 8 provides traffic handled by non-major ports in terms of maritime states (geographic location) and Table 9 gives a glimpse of commodity profile of the cargo handled. The above table reflects that Gujarat accounted for (71.3%) of the traffic handled by the non-major ports followed by Andhra Pradesh (17.7%) and Maharashtra (5.8%). Three maritime States, viz, Gujarat, Andhra Pradesh and Maharashtra together accounted for about 95% of the total cargo traffic handled by the non-major ports in 2014-15.

1.5.4 Two commodities, viz. POL and Coal accounted for two-third of the total cargo handled at the non-major ports during 2014-15.(Table 9).

Table 9: Commodity-wise Traffic Handled by Non-Major Ports							
	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15(P)	% change 2014-15/ 2013-14
	(000 Tonnes)						
POL	137720 (47.7)	145378 (46.1)	156322 (44.2)	168565 (43.5)	169777 (40.7)	156507 (33.2)	-7.8
Iron Ore	48813 (16.9)	38266 (12.1)	30616 (8.7)	21855 (5.6)	18338 (4.4)	27070 (5.7)	47.6
Building Material	13142 (4.5)	12327 (3.9)	12866 (3.6)	11953 (3.1)	14178 (3.4)	14435 (3.1)	1.8
Coal	41276 (14.3)	58462 (18.5)	79040 (22.3)	109264 (28.2)	126321 (30.3)	158755 (33.7)	25.7
Fertilizer & FRM	9501 (3.3)	12725 (4.0)	15742 (4.5)	12548 (3.2)	12010 (2.9)	13940 (3.0)	16.1
Others	38485 (13.3)	48200 (15.3)	59159 (16.7)	63738 (16.4)	76346 (18.3)	100488 (21.3)	31.6
All	288937 (100.0)	315358 (100.0)	353745 (100.0)	387923 (100.0)	416970 (100.0)	471195 (100.0)	13.0
Note: Figure in parenthesis is the percentage share of major commodity groups in the total traffic handled by the Non major ports							

1.5.5 The share of Maritime States/UTs in the total traffic and Commodity-wise composition of traffic in 2014-15 is depicted in the pie Charts IV and V.



POL : Petroleum, Oil & Lubricants FRM : Fertilizer Raw Material

1.5.6 Maritime State-wise & commodity-wise traffic handled at non-major ports during the last few years is given in **Annex 3**.

1.6 Impact of Global Macro Developments on Maritime Trade

1.6.1 Impact of growth on India's seaborne cargo

1.6.1.1 India's Maritime Transport growth is driven by developments in the world economy viz. growth in world output & trade as well as in Indian economy. Thus volume of seaborne cargo traffic is essentially in the nature of derived demand and is mainly shaped by the levels and changes in both the global and domestic activity. During 2014-15, the GVA growth increased to 7.2% from 6.6% in 2013-14. Cargo traffic handled by India's 12 major ports (which accounts for 55% of India's total seaborne cargo) during 2014-15 was

581.33 million tonnes compared to 555.49 million tonnes during 2013-14 showing a growth of 4.7%. The trajectory of growth in cargo handled at India's major ports comes into sharp focus when these growth rates are viewed in terms of quarterly growth trajectories. The Industry sector which is a major factor influencing seaborne container cargo traffic posted a higher GVA growth of 6.1% in 2014-15 as compared to 4.5% in 2013-14. GVA of Industry sector recorded quarterly growth ranging from 4.0% to 5.0% during 2013-14 and from 3.6% to 7.7% during 2014-15. While trends in POL, coal and fertilizers are largely driven by the dynamics of domestic demand supply, those of container traffic and other cargo in particular are largely shaped by the state of global demand and economic activity. Iron ore traffic has been impacted by the judicial intervention. Coal which is imported to meet the demand of power and steel sector was the only commodity posting Quarterly non-negative growth in all the Quarters of 2013-14 & 2014-15. The impact of global demand was pronounced in case of container traffic, which reflects negative growth in trade in manufactures in 2013-14. During 2014-15, container traffic has shown positive growth of 4.1%. Iron ore cargo traffic which picked-up in the second quarter of 2013-14 has again declined from Q2 onwards of 2014-15. The growth in Iron Ore traffic, in the first quarter of 2014-15 at 4.4% posted negative growth of 42.2% in the second quarter of 2014-15 and continue to record negative growths of 41.3% & 54.1% in Q3 and Q4 of 2014-15 respectively. The overall growth of Cargo handled, which was negative in Q1 of 2013-14, has been positive thereafter till the Q4 of 2014-15.

1.6.1.2 Table 10 gives Quarter wise trend in growth of cargo traffic handled at Major ports, GVA and GVA of Industry sector during 2013-14 and 2014-15.

Table -10 - Quarter-wise trend in growth of Cargo Traffic at Major Ports and GVA										
Commodities/ Year	2013-14				Annual	2014-15				Annual
	Q1	Q2	Q3	Q4	2013-14	Q1	Q2	Q3	Q4	2014-15
POL	5.0	2.8	-2.3	9.1	3.6	-0.4	-0.8	4.1	0.8	0.9
Iron Ore	-61.5	37.2	56.9	52.4	-3.9	4.4	-42.2	-41.3	-54.1	-36.9
Coal	33.1	24.7	19.7	4.8	19.9	0.0	11.0	19.4	26.9	14.0
Fertilizer	15.1	-25.3	-15.2	21.8	-7.4	20.8	10.0	15.6	36.2	19.5
Container										
In tonnes	-6.6	-3.4	-2.9	-4.2	-4.3	3.6	6.1	6.6	0.3	4.1
In TEUs	-4.3	-4.7	-3.3	-1.0	-3.3	4.0	9.1	12.1	2.1	6.7
Other cargo	-3.0	8.4	-8.7	-15.3	-5.9	15.3	14.8	4.8	9.1	10.9
Cargo	-0.9	5.9	1.0	1.3	1.8	4.1	4.1	6.0	4.4	4.7
GVA overall	7.2	7.5	6.6	5.3	6.6	7.4	8.4	6.8	6.1	7.2
GVA -Industry	4.8	4.0	5.0	4.3	4.5	7.7	7.6	3.6	5.6	6.1

GVA: Gross Value Addition at factor cost (at 2011-12 prices).

1.6.2 Global Ocean Freight Rates

Freight Rates

1.6.2.1 After five years of economic downturn, 2013 was marked by another gloomy and volatile maritime freight rate market. Indeed, all shipping segments suffered substantially, with freight rates in dry bulk and tanker markets reaching a 10-year low in 2013 and similarly low levels in the container-liner market. The general causes of freight rates low performance remain, as in previous years, the result of a poor world economic development, weak or hesitant demand and persistent overcapacity from the supply side in the global shipping market

Container freight rates

1.6.2.2 The container-ship market was tense throughout 2013, with freight rates remaining volatile and struggling to rise. Overall the sector fundamentals were slightly unbalanced, leading to low freight rates and low returns with which carriers had to struggle throughout the year. Overall global demand for containers transported by sea witnessed a growth estimated at 4.7 per cent in 2013 compared to 3.2 per cent in 2012. This global growth in demand was matched by a slight deceleration in growth of global container supply that was 4.7 per cent in 2013 compared to 4.9 per cent in 2012. The growth in container demand, which was observed in most trade routes did not have an impact on freight rates as they remained historically weak and volatile. This is an indication that structural oversupply pertained, with the majority of trade lanes being oversupplied with tonnage. The delivery of new container ships in 2013, mainly dominated by large Post-panamax vessels of 8,000+ TEU capacities, did not help reverse the tendency. Average freight rates on most trade lanes remained low and significantly below those of 2012. Despite better economic prospects and an increase in freight rates at the beginning of 2014, the market is expected to remain under pressure because of the persistent mismatch between supply capacity and demand. Freight rates on individual routes will therefore continue to be determined by the way supply capacity management will be handled.

Tanker freight rates

1.6.2.3 Freight rates in the tanker segment remained weak in 2013, reaching historically low levels in both crude and products sectors reflected in Table 11, the Baltic

Exchange Tanker Indices maintained their downtrend since 2009. The average Dirty Tanker Index declined to 645 points in 2013 compared to 720 in 2012, representing a drop of 10.42 per cent. The average Baltic Clean Tanker Index reached 607 points in 2013 compared to 643 in 2012, a 5.6 per cent drop compared to the 2012 annual average. This decline was mainly due to the lack of equilibrium in the tanker market conditions, which continued to suffer from a relatively soft demand and a massive oversupply of vessels. These trends are reflected in **Table 11**.

Table 11 - Baltic Exchange Rate Index								
	2008	2009	2010	2011	2012	2013	%age Change (2013/2012)	2014 (Estimated)
Dirty Tanker Index	1 510	581	896	782	720	645	-10	638
Clean Tanker Index	1155	485	732	721	643	607	-6	649

1.6.2.4 In the near foreseeable future, as for container shipping, it is likely that the tanker market rates will remain threatened by the imbalance between supply and demand. Changing trade dynamics, longer travel distances and scrapping could potentially absorb the increasing inflow of vessels. However, fleet growth is still expected to outpace tonnage demand. Consequently, the market will remain under pressure in 2014 as a result of overcapacity, whereas 2015 may see some market balance improvement.

Dry Bulk Freight Rates

1.6.2.5 Similar to other shipping segments, a weak demand, the depressed world economic situation, and oversupply of tonnage continue to control the drybulk freight rates. Nevertheless, the year 2013 can be divided into two phases. The Baltic Dry Index, which started the year at 771 points, remained very low during the first six months with a six-month average of 843 points and reaching its lowest level at 745 points in February. However, over the second half of the year, as for oil tankers, the bulk market witnessed noticeable increases in freight rates with the December index reaching 2178 points, leading to an average index of 1214 points for the year compared to an average of 918 points for 2012. Average earnings in all bulk carrier sectors remained relatively weak in 2013 although slightly higher than in 2012, due mainly to the improvements in Capesize spot

earnings in the second half of the year. With earnings averaging \$7,731 per day in 2013, bulk carriers in general had to struggle to cover typical operating expenses. The overall low earnings continued to push owners to keep operating their fleets at slower speeds.

1.6.3 Trends in Global Top 20 Cargo/Container Ports

1.6.3.1 Growth in cargo and container traffic at world's top major ports/container terminals is a barometer of trends in seaborne trade. The growth in cargo traffic (million tonnes) at world's top 20 ports was higher at 7.0 % in 2013 as compared to 4.9% in 2012. Similarly, the growth in container traffic (million TEUs) was 3.8 % in 2013 as compared to 3.7% in 2012.

Recent trends in Top 20 World Major Ports (in Million Tonnes) and Container Ports (in million TEUs) are given in **Table 12** and **Table 13** respectively.

Table 12 - Top 20 World Major Ports (in Million Tonnes)				
S.No.	Port	2011	2012	2013
1	Ningbo & Zhoushan (PRC)	691	744	809.8
2	Shanghai (PRC)	727.6	736	776
3	Singapore	531.2	538	560.9
4	Tianjin (PRC)	451	476	500.6
5	Guangzhou (PRC)	429	434	454.7
6	Qindao(PRC)	375	402	450
7	Tangshan (PRC)	308	364.6	446.2
8	Rotterdam(Netherlands)	434.6	441.5	440.5
9	Dalian(PRC)	338	373	408.4
10	Yingkou(PRC)	261	301.1	330
11	Rizhao (PRC)	252.6	281	309.2
12	Port Hedland (Australia)	199	246.7	288.4
13	Hong Kong 1)	277.4	269.3	276.1
14	Qinhuangdao(PRC)	287	271.5	272.6
15	Busan 2)	269.9	270.9	260
16	Shenzen (PRC)	223	228.1	234
17	Xiamen(China)	156.5	172	191
18	Antwerp (Belgium)	187.2	184.1	190.8
19	South Louisiana(USA)	170.4	161.9	187.8
20	Port Klang (Malaysia) 2)	148.9	151.7	152
	Total of Top 20 Ports	6718.3	7047.4	7539
Source: Port Statistics, Port of Rotterdam Authority; PRC: Peoples Republic of China; : 1) Including river trade, 2) Converted from freight ton to metric ton				

Table 13 - Top 20 World Container Ports (in Million TEUs)				
S.No.	Port	2011	2012	2013
1	Shanghai (PRC)	31.74	32.53	36.62
2	Singapore	29.94	31.65	32.6
3	Shenzhen (PRC)	22.57	22.94	23.28
4	Hong Kong (PRC)1)	24.22	23.12	22.35
5	Busan (Republic Korea)	16.19	17.04	17.69
6	Zhoushan/Ningbo 3)(PRC)	14.69	15.7	17.35
7	Qingdao(PRC)	13.02	14.6	15.52
8	Guangzhou(PRC)	14.4	14.7	15.31
9	Dubai Ports (UAE)	13	13.28	13.64
10	Tianjin(PRC)	11.5	12.3	13.0
11	Rotterdam (Netherlands)	11.89	11.87	11.62
12	Port Klang (Malaysia)	9.6	10.0	10.35
13	Dalian(PRC)	6.4	8.06	10.01
14	Kaohsiung (Taiwan)	9.64	9.78	9.94
15	Hamburg (Germany)	9.01	8.86	9.26
16	Antwerpen (Belgium)	8.66	8.64	8.58
17	Xiamen(PRC)	6.47	7.2	8.01
18	Tanjung Pelepas (Malaysia)	7.5	7.7	7.62
19	Jakarta(Indonesia)	5.65	6.2	6.17
20	Los Angeles (USA)	7.94	8.08	6.15
	Total of Top 20 Ports	274.03	284.25	295.07
Source: Port Statistics, Port of Rotterdam Authority; PRC: Peoples Republic of China; All China Ports including domestic trade and river trade; 1) Including river trade				

1.7 Policy Initiatives - Central Government

1.7.1 In October 1996, the then Ministry of Surface Transport issued guidelines for Private Sector participation in Major Ports. The guidelines were intended to precisely define the options for the involvement of private sector in the Major Ports.

1.7.2 Government also issued guidelines on joint venture formation in Major Ports which came into effect from 1.9.2000. In order to attract private sector investment, model bid documents were finalised for private sector projects laying down transparent bidding procedure, qualifications and selection criteria, bid evaluation procedure, termination payment, dispute resolution process etc. and detailed terms and conditions of the License Agreement, to ensure bankability, uniformity and reduction in time taken to select the private parties.

1.7.3 The Major Port Trust Act, 1963 was further amended in the year 2000 for allowing Major Ports to form joint ventures with Non-Major/Foreign Ports as well as companies.

1.7.4 Measures for increasing the capacity of Major Ports which are under the control of Central Government are taken as part of an ongoing process, keeping in view the demands of maritime trade through implementation of development plans for the ports, improvement in productivity, etc. At the end of March 2015 the cargo handling capacity of Major Ports was 871.52 Million Tonnes. Commodity-wise capacity of Major Ports at the end of March 2009 to 2015 is given in Annex IV.

Maritime Agenda 2010-20

1.7.5 In the Maritime Agenda a target of 3130 MT Port capacity has been set for the year 2020. More than 50% of this capacity is to be created in the Non-Major Ports. The Non-Major Ports are expected to play a major role and by the year 2020, the traffic handled by Non-Major Ports is expected to increase to 1280 Million Tonnes (MT). The objective is not only creating more capacity but to bring out ports at par with the best international Ports in terms of performance. This will reduce the transaction cost considerably for our trade, thus making them globally competitive. The total proposed investment in Major and Non-Major Ports by 2020 is expected to be around Rs.2,96,000 crore. Most of this investment has to come from the private sector. Public Funds will be mainly deployed for common user infrastructure facilities like deepening of port channels, rail and road connectivity from ports to hinterland etc. Foreign Direct Investment up to 100% under automatic route is permitted for construction and maintenance of Ports.

The Ministry of Shipping is continuously engaged in designing and implementing various projects for development of port sector. To increase the pace of growth and to improve the efficiency of the delivery system, the Ministry of Shipping has come out with a Maritime Agenda 2010-20 for the next ten years. The Agenda is an effort to identify the areas for attention during 2010-11 to 2019-20.

1.7.6 The agenda for the Ports are:-

- Develop Two New Major Ports one each on east and west coasts.
- Full mechanization of cargo handling and movement

- Major Ports to have draft of not less than 14 metres and hub ports 17 metres.
- Identification and implementation of projects for rail, road and inland waterway connectivity to ports.
- Development of two hub ports on each of the West and the East coasts
- **Port Policy Measure**
 - New Land Policy for Major Ports
 - New Policy on captive berths
 - New Policy on dredging
 - Shifting of transshipment of Indian containers from foreign ports to Indian ports.
 - Policy on co-operation and competition amongst Indian Ports
 - Establishing Indian Ports Global for overseas investments by Indian Ports.
 - Development of two non-major ports, one at Dugarajapatnam in Andhra Pradesh and other in Sagar, West Bengal.

Private Sector Participation

1.7.7 With opening up of the Indian economy, the Government of India has allowed private sector participation in Major Ports to infuse funds, induct latest technology, improved management practices and above all addition of capacity. Foreign direct investment upto 100% under automatic route is permitted for construction and maintenance of Ports and Harbours. Maritime States have also identified projects for development of non-major ports for creation of additional capacity. Private sector is envisaged to fund most of the projects through PPP or BOT or BOOT basis. It is envisaged that private sector will mainly contribute towards the cost of development of ports in India.

1.7.8 To encourage private sector participation uniformity, clarity and transparency in the bidding process is of the prime importance. The Ministry of Shipping has already put in place guidelines for private sector participation. To ensure uniformity in short listing and bidding Model RFQ and RFP documents have been finalized. A Model Concession Agreement has also been finalized which attempts to bring in uniformity to the agreements to be signed by the Major Ports as Concessioneering Authority with the various private operators as concessionaire. During the year 2014-15, 10 Public Private Partnership (PPP) projects were awarded at an estimated investment of Rs. 9376.42 crore for capacity

addition of 95.11 MT in the major ports comprising construction of berths and terminals, mechanization of existing berths etc.

1.7.9 The preferred route for private sector participation is through open competitive bidding in which the bidder offering the highest percentage of revenue share out of the operation of the facility which is licensed out is selected. The tariff fixation is carried out by TAMP which is an independent Regulatory Body. At present the tariffs are fixed upfront which act as a ceiling before a project is bidded out on revenue share basis as explained above. The private operators are free to charge below the ceiling.

Areas of private investment

1.7.10 The following areas which are indicative in nature have been identified for participation/investment by private sector:-

- (a) Leasing out existing assets of the Port.
- (b) Construction/creation of additional assets, such as:
 - ❖ construction and operation of container terminals.
 - ❖ construction and operation of bulk, break bulk, multipurpose and specialized cargo berths.
 - ❖ warehousing, container freight stations, storage facilities and tank farms.
 - ❖ cranes/handling equipment.
 - ❖ setting up of captive power plants.
 - ❖ dry docking and ship repair facilities.
- (c) Leasing of equipment for port handling and leasing of floating crafts from the private sector.
- (d) Pilotage.
- (e) Captive facilities for port based industries.

National Transport Development Policy Committee (NTDPC)

1.7.11 The Government of India had constituted National Transport Development Policy Committee (NTDPC) in 2010 under the Chairmanship of Dr. Rakesh Mohan to formulate a long term Transport Policy. The Committee has inter-alia made several recommendations for Port Sector with the intent to provide a long term direction to the future development and governance of Indian ports and to incentivise and integrate water

based transport for it to play an increasing role in the national transport network. Key recommendations of the Committee are:

a) Strategic view on port investment

(i) Mega ports

A key government priority should be to invest in 4 to 6 Mega ports over the next 20 years, with 2 to 3 on each coast to substantially cater to our foreign trade and the estimated requirement of raw material imports and exports by 2030. These mega ports can be established either by transforming some of the existing major (or non-major) ports into mega ports, if feasible, by combining some major and minor ports, or by setting up totally new mega ports. The location of the proposed mega ports should be harmonised with plans for the NHDP as well as with the upcoming and future DFCs.

An expert group needs to be expeditiously set up to study and identify potential locations for development of these mega ports.

(ii) Drafts

In order for major ports to accommodate larger mother vessels going forward, the draft at major ports needs to be increased to at least 17 meters, by the first half of XIII Plan. The associated incremental capital dredging at most of the ports would require continued Govt. support.

b) Strategic Institutional shift – Landlord model of port governance

- The ports in India, essentially the major-ports, widely follow a hybrid format of the long obsolete service port model and the preferred landlord model. The hybrid approach has resulted in a conflict of interest between the port trusts and the private sector.
- There is immediate need to make appropriate legislative and policy changes to expedite the move to the landlord model and to transform the port trusts to statutory landlord port authorities through specific legislation. All the terminal operations of port trusts would need to be corporatized as public sector corporations. Then, both private- and corporatized public-sector terminal operators would compete under the aegis of the landlord port authority. The corporatized public sector terminal operators could potentially be disinvested, listed, and possibly privatised at a later stage. The landlord port authority would carry out all public sector services and operations such as the award of bids for containers and other terminals, dredging etc.

- Any progressive regulatory shift should attempt to bring in the cooperation and participation of maritime states.
- New Land Policy Guidelines have since been issued in January, 2014. These guidelines provide an open and transparent framework for managing Port Lands. The Policy will ensure that land resources of the Ports are put to optimum use and all leasing of port lands is done through a transparent tender-cum-auction methodology. This has brought in accountability and minimized the element of discretion and arbitrariness at port level.

c) Role of TAMP

Tariff Authority for Major Ports (TAMP) regulates all tariffs in respect of Major Port Trusts and the private operators located therein. Necessary modifications in the Tariff Guidelines are made from time to time to promote the development of the Major Ports, Keeping in view the interest of the various stakeholders. In order to allow the competitive market forces to play a greater role in determination of tariff at Major Ports Trusts, the Government issued two new sets of Tariff Guidelines namely Guidelines for Determination of Tariffs for projects at Major Ports, 2013 and Guidelines for Port Charges, 2015. These Guidelines impart flexibility to the PPP operators as well as Major Ports owned terminals in determining their tariffs.

d) Coastal Shipping

With a view to promote coastal shipping, the Ministry of Shipping has taken a set of policy initiatives. One such initiative is to have a Green Channel clearance for cargo in major Ports as coastal cargo does not require customs clearance and only information needs to be filed with the customs. All the Major Ports are required to identify suitable infrastructure so that Green Channel clearance for coastal cargo can be made operational within the next 12 months. Green Channel clearance has already become operational in 8 Major Ports. Presently because of lack of exclusive berth, storage area and gates for coastal cargo in the ports, there is considerable delay in clearance of these cargoes. The Ministry has given a policy directive to all the major ports to have exclusive berths with associated storage space and separate gates for coastal cargo. A new scheme for setting up of coastal berths at Major Ports has been approved. The

Cabinet has also given approval to create a special purchase vehicle (SPV) to focus on providing different evacuation system in Major Ports and their connectivity.

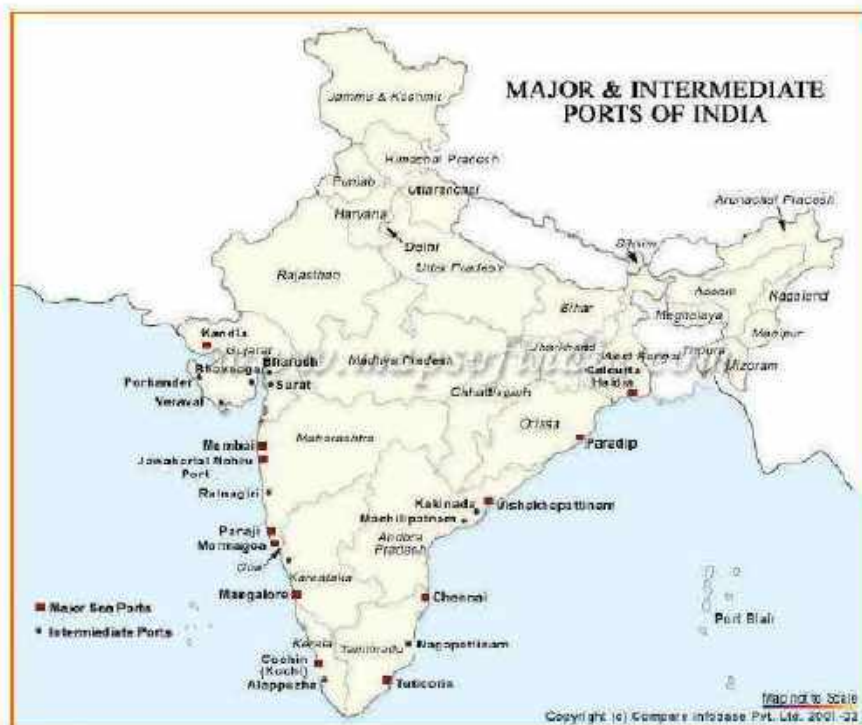
e) Sagarmala Project

The project has been launched with an objective of modernising the ports along India's Coastline and achieving rapid expansion of port capacity and development in land and coastal navigation. The initiative aims at supporting port led development through appropriate policy and institutional interventions, port infrastructure enhancement including modernisation and setting up of new ports and efficient evacuation to and from hinterland. The work under the project will be done in close coordination with Maritime States/ UT governments.

2. POLICY AND PERFORMANCE OF MARITIME STATES

2.1 Ports are economic and service provision units of a remarkable importance since they act as a place for the interchange of two transport modes, maritime and land, whether by rail or road. Therefore, the essential aspect of ports lies in their intermodal nature. India has a coast-line of over 7517 Kms with 12 major ports and 200 notified non-major (minor/intermediate) ports along the coast-line and sea-islands. These 200 Non-major ports are located in Gujarat (41), Maharashtra (48), Goa (5), Daman & Diu (2), Karnataka (11), Kerala (17), Lakshdweep (10), Tamilnadu (15), Puducherry (2), Andhra Pradesh (12), Orissa (13), West Bengal (1) and Andaman & Nicobar Island (23). Out of these 200 Non-major ports, only some ports are well developed and provide all-weather berthing facilities for cargo handling. In 2014-15, only 69 Non-major Ports were reported to have handled cargo traffic. **Chart-VI** gives the geographical location of the Major and prime Non-Major Ports. The Maritime Ports operate within the statutory framework of the Indian Ports Act 1908 which applies to all the ports. However, the Major Ports Act 1963 applies only to Major Ports. Each Major Port is administered by a Port Trust except for the port of Ennore which is a corporatised entity.

Chart - VI



Source: <http://www.mapsofindia.com>

2.2 The Major Ports are under the purview of the Centre while the Non-Major Ports are under the purview of the States. Port development in the Central Sector has emphasized additions to capacity as well as provision of commodity specific handling facilities (at Major Ports) as per the Plan Schemes. With the liberalization of the economy, private sector participation in development of Major Ports has been encouraged. The Maritime States are also actively pursuing the development of Non-Major Ports to meet the growing needs of the sea borne trade.

2.3 Maritime States Development Council (MSDC)

2.3.1 With a view to have an integrated approach for the development of both Major and Non-Major Ports, the **Maritime States Development Council (MSDC)** was constituted in May, 1997 under the Chairmanship of the Hon ble Minister of Shipping. The Ministers in-charge of Ports in all Maritime States, Union Territories of Puducherry, Andaman s & Nicobar Administration, Daman & Diu and Lakshadweep are its members. The deliberations and decisions of the MSDC provide the institutional framework for coordinated development of Major and Non- Major ports. So far fourteen meetings of MSDC have been held.

2.4 Maritime States – Non-Major Ports

Non-major ports in India collectively handled 472.04 million tonnes of traffic during 2014-15 as compared to 416.96 million tonnes of cargo handled in the corresponding period of 2013-14.

2.4.1 GUJARAT

2.4.1.1 The state of Gujarat is endowed with 1215 km length of coastline which constitutes about one-sixth of the total Indian coastline. Out of 42 ports located along its coastline, 41 are non major ports while one port, viz. Kandla is a major port. Out of 41 non-major ports, 17 non-major ports in the State are handling cargo. The remaining 24 non-major ports are used for fishing activities and have traffic only of small volume. A snap view of the location of ports in Gujarat is given in **Chart –VII**

Chart – VII: Gujarat: Major and Minor Ports



Source : http://www.gmbports.org/port_pog.htm

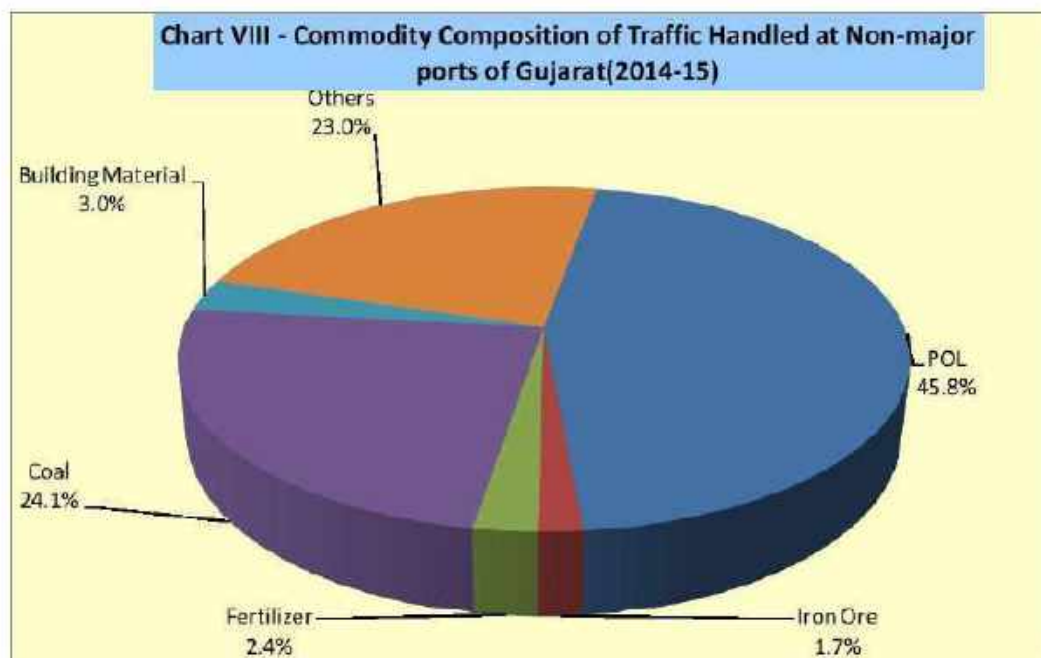
2.4.1.2 The trends in the cargo handled at both major and non-major ports of the State during the last few years and first six months of the current and previous year are given in Table 14.

Table 14 - Gujarat: Trends in Cargo Handled at Major & Non-Major Ports (Million Tonnes)								
Major/Non-Major	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15(P)
Major Ports	64.92	72.22 (11.2)	79.50 (10.1)	81.88 (03.0)	82.50 (00.8)	93.62 (13.5)	87.01 (-07.1)	92.48 (06.3)
Non-Major Ports	150.52	152.8 (01.5)	205.58 (34.5)	230.91 (12.3)	259.05 (12.2)	287.82 (11.1)	309.94 (07.7)	336.09 (08.4)
All Ports	215.44	225.03 (04.5)	285.08 (26.7)	312.79 (09.7)	341.55 (09.2)	381.437 (11.7)	396.95 (04.1)	428.57 (08.0)
Figures in bracket represents percentage change over the previous year/period. (P) Provisional								

2.4.1.3 It is noteworthy that all ports (major and non-major) located along the coast of Gujarat handled more than 40% of the total cargo handled by Indian ports in 2014-15. The total cargo traffic handled at the major and non-major ports of Gujarat during 2014-15 was

of the order of 429 million tonnes as against 397 million tonnes in 2013-14, reflecting an increase of 8.0%. In particular, non-major ports of Gujarat alone handled close to three-fourth of total cargo traffic at India's non-major ports during the period under reference.

2.4.1.4 Amongst the Maritime States of India, Gujarat is one of the States, which has played a proactive role in the development of non major ports on its coastline. The share of commodity-wise traffic handled by non-major ports of Gujarat is shown in **Chart VIII**.



2.4.1.5 Recent trends in cargo handled and capacity creation in non -major ports of Gujarat are captured in the **Table 15**. It indicates sustained increase in cargo throughput and capacity addition. During the year 2014-15, 35 million tonnes of capacity was added taking the total cargo handling capacity in the non- major port sector in the Gujarat to 422 million tonnes. Gujarat Maritime Board (GMB) is the nodal agency for regulation and development of the State's maritime activities.

Table 15 - Gujarat: Non Major Ports - Current Capacity & Utilization (Million Tonnes)								
Item	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15(P)
Capacity*	197	235 (19.3)	244 (3.7)	267 (9.8)	323 (20.8)	366 (13.3)	387 (5.7)	422 (9.0)
Cargo Handled	150.52	152.81	205.58	230.91	259.04	287.82	309.94	336.09
% Utilization	74.92	64.89	84.36	86.35	80.2	78.6	80.1	79.6
* Including Lighter age Port Capacity;								
Figures within parenthesis indicate capacity addition in % age during the year								

2.4.1.6 As per the port policy, Gujarat Maritime Board (GMB) has selected 11 Green Field sites for development of new ports as All weather Deep Water Direct Berthing Ports . Amongst 11 ports, 6 ports are to be developed through private investment and remaining 4 ports in the joint sector.

2.4.2 MAHARASHTRA

2.4.2.1 The State has a coastline of around 653 km, with 2 major ports viz. Mumbai and Jawahar Lal Nehru and 48 non-major ports. Out of 48 non-major ports only 12 handle cargo. Maharashtra Maritime Board (MMB) is the nodal agency for regulation and development of the State's maritime activities.

The trends in the cargo handled at both major and non-major ports of the State during the last few years and current year are given in Table 16.

Table 16 - Maharashtra: Cargo Handled at Major & Non-Major Ports (Million Tonnes)								
Major/Non-Major	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15(P)
Major Ports	112.88	109.18 -(03.3)	115.30 (05.6)	118.90 (03.1)	121.92 (02.5)	122.53 (00.5)	121.52 -(00.8)	125.46 (03.4)
Non-Major Ports	11.36	10.42 -(08.3)	12.05 (15.6)	14.88 (23.5)	19.95 (34.1)	24.20 (21.3)	24.66 (01.9)	27.30 (10.7)
All Ports	124.24	119.6 -(03.7)	127.35 (06.5)	133.78 (05.0)	141.87 (06.0)	146.73 (03.4)	146.18 -(00.4)	152.76 (04.5)
Figures in bracket represent percentage change over the previous year/period. P- Provisional								

2.4.3 GOA

2.4.3.1 Goa with a coastline of about 118 kms. is criss-crossed by 7 rivers. Apart from the major port at Mormugao, there are five non-major ports all of which are riverine ports

with an average depth of about 2 meters except Panaji (which is the lone cargo handling non-major port) with a depth of 4 meters.

The trends in the cargo handled at both major and non-major ports of the State during the last few years and current year are given in Table 17.

Table 17: Goa : Trends in Cargo Handled at Major & Non-Major Ports (MillionTonnes)								
Major/Non-Major	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15 (P)
Major Ports	35.13	41.68 (18.6)	48.85 (17.2)	50.06 (02.5)	39.05 (-22.0)	17.74 (-54.6)	11.74 (-33.8)	14.71 (25.3)
Non-Major Ports	12.83	11.90 (-07.2)	13.90 (16.8)	14.58 (04.9)	14.47 (-00.8)	3.39 (-76.6)	0.28 (-91.6)	0.76 (167.6)
All Ports	47.96	53.58 (11.7)	62.75 (17.1)	64.64 (03.0)	53.52 (-17.2)	21.13 (-60.5)	12.02 (-43.1)	15.47 (28.7)
Figures in bracket represents percentage change over the previous year/period. (P) Provisional.								

2.4.4 KARNATAKA

2.4.4.1 Karnataka has a coastline of about 280 kms. At present, there is one major sea port, the New Mangalore Port and 11 non-major ports in Karnataka. The ports of Karwar, Mangalore, Tadri, Haldipur and Belakari are main cargo handling non-major ports in the state. During 2014-15, non- major ports in the State handled 0.65 million tonnes of cargo traffic as compared to 0.51 million tonnes in 2013-14 reflecting an increase of 27.9% over the corresponding period of previous year.

2.4.4.2 The trends in the cargo handled at both major and non-major ports of the State during the last few years and current year are given in Table 18.

Table 18 - Karnataka: Trends in Cargo Handled at Major & Non-Major Ports (Million Tonnes)								
Major/Non-Major	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15(P)
Major Ports	36.02	36.69 (01.9)	35.53 (-03.2)	31.55 (-11.2)	32.94 (04.4)	37.04 (12.4)	39.36 (06.3)	36.57 (-07.1)
Non-Major Ports	8.90	4.97 (-44.2)	8.55 (72.0)	3.10 (-63.7)	0.59 (-81.0)	0.61 (03.4)	0.51 (-16.6)	0.65 (27.9)
All Ports	44.92	41.66 (-07.3)	44.08 (05.8)	34.65 (-21.4)	33.53 (-03.2)	37.65 (12.3)	39.87 (05.9)	37.22 (-06.7)
Figures in bracket represents percentage change over the previous year/period. (P) Provisional.								

2.4.5 KERALA

2.4.5.1 Kerala has a coastline of 570 kms, with one major port at Cochin and 17 other non-major ports. The Vallarpadam Container Terminal Project in Cochin has been promoted on BOT basis through public private participation.

2.4.5.2 The trends in the cargo handled at both major and non-major ports of the State during the last few years and current year are given in **Table 19**. In Kerala 4 ports, viz, Azhikkal, Beypore, Vizhinjam and Kollam are handling cargo for the last few years.

Table 19 - Kerala : Trends in Cargo Handled at Major & Non-Major Ports (Million Tonnes)								
Major/Non-Major	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15(P)
Major Ports	15.81	15.5 (-02.0)	17.43 (12.5)	17.87 (02.5)	20.09 (12.4)	19.84 (-01.2)	20.89 (05.3)	21.60 (03.4)
Non-Major Ports	0.10	0.13 (30.0)	0.12 (-07.7)	0.12 (00.0)	0.10 (-16.7)	0.10 (-04.0)	0.09 (-06.3)	0.09 (00.0)
All Ports	15.91	15.63 (-01.8)	17.55 (12.3)	17.99 (02.5)	20.19 (12.2)	19.94 (-01.3)	20.98 (05.2)	21.69 (03.4)
Figures in bracket represents percentage change over the previous year/period. (P) Provisional.								

2.4.6 TAMIL NADU

2.4.6.1 Tamil Nadu has a coastline of about 906 km, with 3 major ports at Chennai, Ennore and Tuticorin and 15 non-major ports. Out of 15 non-major ports only 6 handled cargo. A Port Policy for promoting private investment for the development of minor ports in Tamil Nadu has been formulated. Its main objectives are to provide exclusive port facilities for import of Coal/Naphtha/Oil/Natural Gas for shore based thermal power plants, promote export oriented and port based industries along the coastal districts of Tamil Nadu, encourage ship-repairing, ship-breaking and manufacture of cranes and floating cranes. In addition, leisure tourism and water sports along the coastline are also aimed.

2.4.6.2 During, 2014-15 the non-major ports in Tamil Nadu collectively handled 0.83 million tonnes of cargo traffic as compared to 0.87 million tonnes in the previous year. The trends in the cargo handled at both major and non-major ports of the State during the last few years and current year are given in **Table 20**.

Table 20 - Tamil Nadu: Trends in Cargo Handled at Major & Non-Major Ports (Million Tonnes)								
Major/Non-Major	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15(P)
Major Ports	90.19	91 (00.9)	95.55 (05.0)	98.2 (02.8)	98.77 (00.6)	99.55 (00.8)	107.08 (07.6)	115.21 (07.6)
Non-Major Ports	0.89	0.90 (01.1)	1.17 (30.0)	1.61 (37.6)	1.21 (-24.8)	0.93 (-23.1)	0.87 (-06.9)	0.83 (-04.7)
All Ports	91.08	91.9 (00.9)	96.72 (05.2)	99.81 (03.2)	99.98 (00.2)	100.48 (00.5)	107.95 (07.4)	116.03 (07.5)
Figures in bracket represents percentage change over the previous year/period. (P) Provisional.								

2.4.7 ANDHRA PRADESH

2.4.7.1 The State is bestowed with a coastline of about 974 kms. There is one major port viz Visakhapatnam and 12 non-major ports in Andhra Pradesh.

2.4.7.2 The State had prepared a perspective developmental plan, in its *VISION 2020 Document* for development of its ports with a view to enhance cargo handling capacity at its Non-Major Ports to around 173 million tonnes by 2020. As large investments are required for capacity creation, the State Government policy intends to encourage the participation of private sector in port development.

2.4.7.3 Ports in Andhra Pradesh collectively handled 141.4 million tonnes of cargo during 2014-15 compared with 117.2 million tonnes in 2013-14 thus registering an increase of 20.7% in traffic handled by major and non-major ports of Andhra Pradesh. Non-major ports in Andhra Pradesh posted sharp growth of 42.2% in 2014-15. The trends in the cargo handled at both major and non-major ports of the state during the last few years and current year are given in Table- 21.

Table 21 - Andhra Pradesh: Trends in Cargo Handled at Major & Non-Major Ports (Million Tonnes)								
Major/Non-Major	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15 (P)
Major Ports	64.6	63.91 (-01.1)	65.5 (02.5)	68.04 (03.9)	67.42 (-00.9)	59.04 (-12.4)	58.50 (-00.9)	58.00 (-00.9)
Non-Major Ports	19.29	29.72 (54.1)	43.69 (47.0)	43.27 (-01.0)	45.63 (05.5)	51.81 (13.5)	58.69 (13.3)	83.44 (42.2)
All Ports	83.89	93.63 (11.6)	109.19 (16.6)	111.31 (01.9)	113.05 (01.6)	110.85 (-01.9)	117.2 (05.7)	141.4 (20.7)
Figures in bracket represents percentage change over the previous year/period. (P) Provisional.								

2.4.8 ORISSA

2.4.8.1 Orissa has a Coast line of 480 Kms. from Andhra Pradesh border in Ganjam District to West Bengal border in Balasore District. It is endowed with conducive, unique, natural and strategic port locations. The Government of Orissa has identified 14 potential sites for development of Minor Ports. To facilitate developers for development of Minor Ports, Government of Orissa has framed the Port Policy during the year 2004.

2.4.8.2 The advantages for development of sea ports in Orissa includes availability of a vast hinterland generating cargo, comprising of other developing Eastern and Central Indian States, mineral rich hinterland which offers long term potential for cargo which need seaport facility in Orissa. Paradip port is the only major port in the State under the control of Government of India which is packed to accommodate increasing traffic.

2.4.8.3 Non-major ports in Orissa collectively handled 15.45 million tonnes of cargo during, 2014-15 compared with 14.37 million tonnes in 2013-14 thus registering an increase of 7.5% in traffic. The trends in the cargo handled at both major and non-major ports of the State during the last few years and current year are given in **Table 22**.

Table 22 - Orissa : Trends in Cargo Handled at Major & Non-Major Ports (Million Tonnes)								
Major/Non-Major	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15(P)
Major Ports	42.44	46.41 (09.4)	57.01 (22.8)	56.03 (-01.7)	54.25 (-03.2)	56.55 (04.2)	68.00 (20.2)	71.01 (04.4)
Non-Major Ports	0.3	0.3 (00.0)	0.42 (40.0)	0.4 (-04.8)	5.08 (1170.0)	11.07 (117.9)	14.37 (29.8)	15.45 (07.5)
All Ports	42.74	46.71 (09.3)	57.43 (23.0)	56.43 (-01.7)	59.33 (05.1)	67.62 (14.0)	82.371 (21.8)	86.46 (05.0)
Figures in bracket represents percentage change over the previous year/period.								
(P) Provisional. *: Dhamra Port has started operations in May 2011.								

2.4.9 WEST BENGAL

2.4.9.1 The State of West Bengal has a coastline of about 158 kms which has two Docks at Kolkata and Haldia under a single major port and one non- major port.

The trends in the cargo handled at both major and non-major ports of the State during the last few years and first six months of the current and previous year are given in Table 23.

Table 23- West Bengal :Trends in Cargo Handled at Major & Non-Major Ports (Million Tonnes)								
Major/Non-Major	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15(P)
Major Ports	57.33	54.22 -(05.4)	46.43 -(14.4)	47.55 (02.4)	43.25 -(09.0)	39.93 -(07.7)	41.39 (03.7)	46.29 (11.8)
Non-Major Ports	0	0	0	0	0	0	0	0
All Ports	57.33	54.22 -(05.42)	46.43 -(14.37)	47.55 (02.41)	43.25 -(09.04)	39.93 -(07.68)	41.39 (03.66)	46.29 (11.84)
Figures in bracket represents percentage change over the previous year/period. P- Provisional								

2.4.10 OTHER NON-MAJOR PORTS

The other non-major ports are spread across the Union Territories (UTs) of Daman & Diu, Puducherry, Lakshadweep, and Andaman & Nicobar Islands. These ports in the UTs are administered through their respective Departments. Andaman & Nicobar Islands administration has constituted a Port Management Board for the development of ports in the Islands. The two non-major ports of Daman & Diu are not handling any cargo traffic for the last few years.

The trends in the cargo handled at both major and non-major ports of the State during the last few years and current year are given in Table 24.

Table 24 - Union Territory: Trends in Cargo Handled at A & N Islands Port (Million Tonnes)								
Major/Non-Major	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15 (P)
Andaman & Nicobar Islands	2.16	2.01 -(06.9)	2.07 (03.0)	1.68 -(18.8)	1.21 -(28.0)	1.07 -(11.6)	1.15 (07.5)	1.51 (31.1)
Figures in bracket represents percentage change over the previous year/period. P- Provisional								

The cargo handling capacity at Puducherry is estimated 200,000 tonnes of cargo per annum. In January 2006, the Government of Puducherry entered into a concession agreement with private developers for the development of deep water ports on BOT basis

at Puducherry and Kariakal. The development work at Kariakal port has begun and commercial operations started in April 2009.

The trends in the cargo handled at both major and non-major ports of the State during the last few years and current year are given in **Table 25**.

Table 25 - Union Territories: Trends in Cargo Handled at Non-Major Ports (Million Tonnes)								
Major/Non-Major	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15 (P)
Lakshadweep	0.03	0.03	0.03	0.03	0.03	0.03	0.12	0.12
Puducherry	0.01	0.05	1.32	4.71	6.42	6.91	6.28	4.96

3: PERFORMANCE INDICATORS

3.1 Capacity Utilization

Over the years, cargo handling capacity of major ports has steadily increased to cater to the growing volume of internal and external trade. The capacity of the ports which was 172.59 million tonnes at the end of 1993-94 increased to a level of 871.52 tonnes at the end of 2014-15. The port-wise capacity and traffic for 2014-15 is brought out in Table 27.

Table 27 - Major Port-wise Capacity Utilization During 2014-15 (Million Tonnes)			
Name of the Port	Capacity	Traffic	Capacity Utilisation(%)
Kolkata Dock System	21.1	15.28	72.42
Haldia Dock Complex	49.75	31.01	62.33
Paradip	119.8	71.01	59.27
Visakhapatnam	96.76	58.00	59.94
Ennore	37	30.25	81.76
Chennai	86.04	52.54	61.06
Tuticorin	44.55	32.41	72.75
Cochin	49.66	21.60	43.50
New Mangalore	77.77	36.57	47.02
Mormugao	43.76	14.71	33.62
J. L. Nehru	79.37	63.80	80.38
Mumbai	44.53	61.66	138.47
Kandla	121.43	92.50	76.18
ALL PORTS	871.52	555.5	63.74

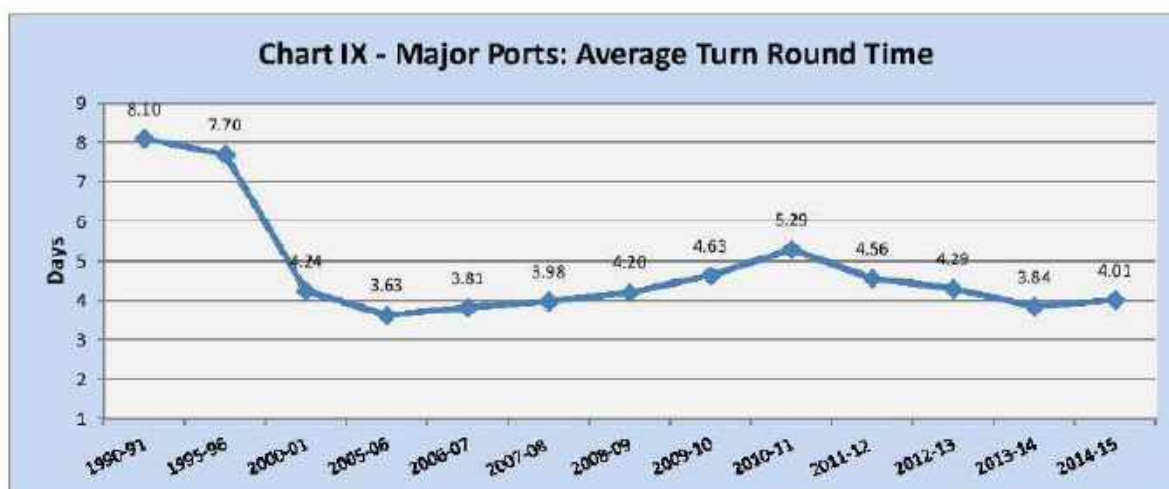
3.2 Port Efficiency

3.2.1 Efficiency at ports has an impact on transaction cost of shipping lines. Major Ports have improved their efficiency of operations as reflected in select physical performance indicators over the last several years. Some key operational indicators of physical performance pertaining to major ports for the select years are elaborated below.

Average Turn-Round Time (TRT)

3.2.2 This parameter has improved significantly during the past one and half decades for all the major ports. Average TRT for all major ports improved from 8.10 days in 1990-91 to 3.63 days in 2005-06. Thereafter the TRT has increased steadily to 5.29 days in 2010-11. In 2011-12, the average TRT declined to 4.56 days and further to 3.84 days in

2013-14. However, TRT increased to 4.01 during 2014-15. The TRT varied in a range between 1.77 days at Cochin Port to 7.01 at Paradip during 2014-15. Amongst the 12 major ports improvement in TRT during 2014-15 in comparison to 2013-14 is reflected clearly for most of the Major Ports except Paradip, Vishakhapatnam, Kamarajar, Chennai and Mumbai. Port-wise TRT for select years are given in **Table 28**. The path of turn round time at major ports for select years since 1990-91 to 2014-15 is presented in the **Chart IX** below.



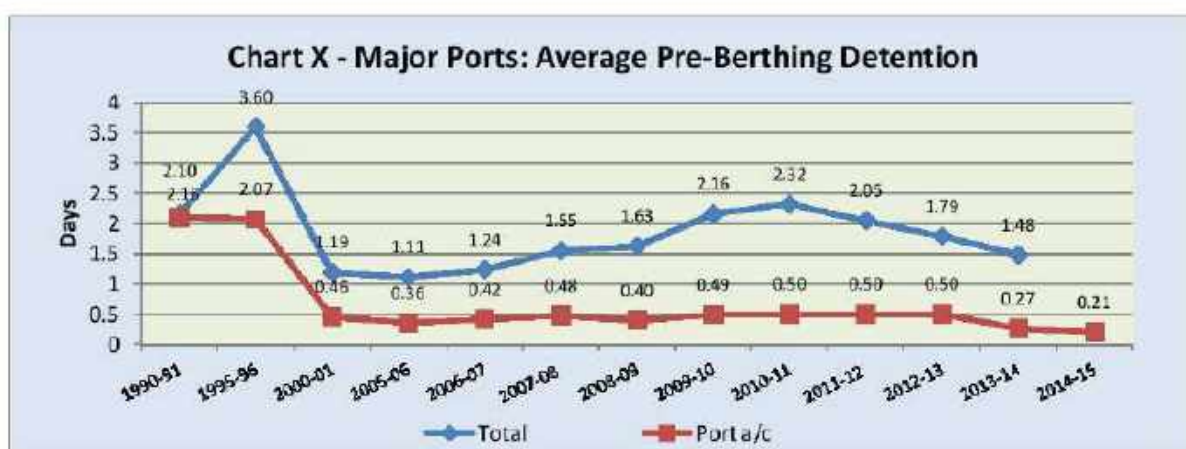
Turn-Round Time - Total time spent by a ship since its entry till its departure.

Port	1990-91	2000-01	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15(P)
1	2	3	4	5	6	7	8	9	10
Kolkata D.S	11.90	5.50	5.10	6.80	6.21	5.45	4.72	4.51	4.18
Haldia D.C	6.47	3.97	4.21	5.01	4.45	3.62	3.95	3.77	3.37
Paradip	8.40	4.16	4.78	9.04	7.73	6.33	4.39	4.62	7.01
Vishakhapatnam	7.07	3.71	3.93	4.78	5.84	5.68	5.39	4.73	5.67
Ennore			2.35	2.11	2.78	2.17	2.95	4.24	4.32
Chennai	7.20	5.83	4.15	4.04	4.36	3.91	3.24	2.46	2.54
Tuticorin	4.70	4.10	3.64	3.90	4.00	4.94	4.31	3.92	3.55
Cochin	4.00	3.11	2.14	2.08	2.20	1.82	1.58	1.76	1.77
New Mangalore	4.96	2.89	3.00	3.06	2.70	2.95	3.29	3.18	2.46
Mormugao	6.40	4.25	5.95	8.91	10.43	7.68	5.06	4.50	4.15
J.L.Nehru		2.21	1.90	2.01	2.64	1.94	2.48	2.26	2.24
Mumbai	10.80	5.20	4.95	4.61	4.96	5.22	5.58	4.25	5.28
Kandla	10.00	4.72	7.26	5.03	5.90	6.42	6.33	5.66	5.38
All Ports	8.10	4.24	4.20	4.63	5.29	4.56	4.29	3.84	4.01

Source: Major Ports / Indian Ports Association (IPA)

Average Pre Berthing Detention Time (PBDT)

3.2.3 The average overall pre berthing detention time for all major ports declined from 2.2 days in 1990-91 to 1.63 days in 2008-09. However, in 2009-10 and 2010-11, the average PBDT edged up to 2.16 days and 2.32 days respectively. In contrast, average PBDT on port account has seen a sharper decline from 2.10 days in 1990-91 to 0.50 day in 2010-11. Average PBDT on port account which remained same at 0.50 days in 2011-12 and 2012-13 declined to 0.27 days in 2013-14 and further declined to 0.21 days in 2014-15. Port-wise PBD for select years is indicated in **Table 29**. The trajectory of weighted average of pre berthing detention time at Major ports- total and on port account -during 1990-91, 1995-96, 2000-01, 2005-06 onwards is shown in **Chart X** below.



Pre-Berthing Detention - The time for which a ship waits before getting entry into berth.

Port	1990-91	2000-01	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15(P)*
1	2	3	5	6	7	8	9	10
Kolkata D.S	0.90	0.61	1.31	1.23	0.77	0.61	0.61	0.01
Haldia D.C	1.66	0.91	4.39	3.73	2.54	2.29	2.29	0.49
Paradip	1.59	1.41	6.30	5.04	3.69	1.65	1.65	0.04
Vishakhapatnam	1.83	0.75	1.90	2.81	2.84	2.50	2.50	0.08
Ernore			0.37	0.65	0.76	1.33	1.33	0.00
Chennai	2.10	2.45	1.35	1.61	1.16	0.80	0.80	0.03
Tuticorin	0.90	1.40	1.36	1.29	1.91	1.31	1.31	0.16
Cochin	0.83	0.74	0.85	1.03	1.05	1.09	1.09	0.08
New Mangalore	0.79	0.77	0.81	0.59	0.79	1.04	1.04	0.01
Mormugao	2.51	1.32	3.46	4.07	2.94	1.62	1.62	0.25
J.L.Nehru		0.67	0.98	1.51	1.13	1.31	1.31	0.41
Mumbai	3.40	1.26	1.06	1.23	1.37	1.62	1.62	0.30
Kandla	4.40	1.51	2.60	3.32	3.74	3.58	3.58	0.40
All Ports	2.16	1.19	2.16	2.32	2.05	1.79	1.79	0.21

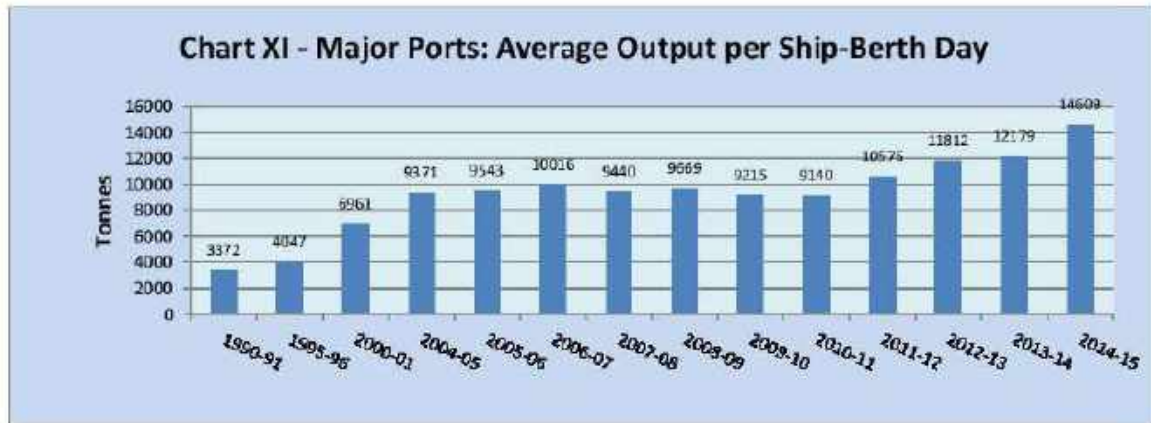
Source: Major Ports/ Indian Ports Association(IPA) - *: On Port Account only

Average Output Per Ship Berth-day

3.2.4 During the last 25 years this indicator has seen a tremendous improvement. Average Output per Ship-berth day has increased more than four times from 3,372 tonnes in 1990-91 to 14609 tonnes in 2014-15 for major ports. However, average output per ship berth day is marked by substantial variation across major ports ranging from a high 30004 tonnes in case of Kamarajar port to a low of 3844 tonnes at Kolkata Dock System during 2014-15. This variation reflects the type of cargo being handled, level of mechanization and labour practices. Amongst the 12 major ports, improvement in average Output per Ship Berth-day during 2014-15 as compared to 2013-14 is visible in all the ports except Paradip and Vishakhapatnam. Port-wise average output per Ship-berth day for select years and latest period are given in Table 30.

Table 30 : Average Output per Ship Berth-day (Tonnes)						
Port	1990-91	2000-01	2011-12	2012-13	2013-14	2014-15(P)
1	2	3	7	8	9	10
Kolkata D.S	560	2305	2503	2762	2963	3844
Haldia D.C	5659	6384	6728	6078	6130	6802
Paradip	4082	8503	15995	16625	18179	17736
Visakhapatnam	5325	9799	10704	10641	10925	10638
Ennore			27505	27741	22357	30004
Chennai	3912	6977	10352	12046	14268	15419
Tuticorin	2130	3983	6733	7452	9633	10147
Cochin	3714	6138	15784	15878	15881	16770
New Mangalore	4412	12192	13957	15921	16314	19414
Mormugao	10429	12438	10530	11484	10018	11332
J.L.Nehru		6383	19227	23319	23014	24411
Mumbai	2310	4213	6476	8709	7057	7619
Kandla	4417	8230	14272	15728	15729	16457
All Ports	3372	6961	10575	11812	12179	14609
Source: Major Ports /Indian Ports Association (IPA).						

3.2.5 The average out-put per ship-berth-day for selected years since 1990-91 to 2014-15 is presented in the **Chart XI** below.



Output per Ship- Berth day Total tonnage handled distributed over total number of berth days

4. PRIVATE SECTOR/CAPTIVE/JOINT SECTOR PORT PROJECTS

Brief details of the ongoing Private Sector/Captive/Joint Sector Port Projects and a list of these projects under consideration as on 30.3.2015 are brought out in Appendix-I & Appendix-II in respect of Major Ports and in Appendix-III & Appendix-IV for Non Major Ports.

**Ongoing Private Sector/Captive/Joint venture Port Projects
(Major Ports)**

Sl. No	Project Name	Port Name	Capacity (Million Tonnes)	Project Cost (Rs. Crores)	Project Status
1	2	3	4	5	6
1.	Development of Container Terminal on DBFOT basis.	Kamarajar Port Ltd.	15.8MT	1270	-Concession Agreement signed with the Concessionaire Adani Ennore Container Terminal Pvt. Ltd. on 15.3.14 -Award of Concession for Phase-I Development (400 m quay length) was granted to the Concessionaire on 20.10.14. -The Concessionaire is carrying out the Berth construction and backup yard development activities in the Project Site.
2	Development of Multi Cargo Terminal on DBFOT basis.	Kamarajar Port Ltd.	2.00	151	Concession Agreement signed with the Concessionaire M/s Chettinad International Bulk Terminal Pvt. Ltd. on 28.3.14 -Award of Concession was granted to the Concessionaire on 24.02.14 -DPR finalization is under progress
3	Construction of Coal Berth No.3	Kamarajar Port Ltd.	9.00	198.95	LOA was issued to M/s ITD Cementations Ltd and Date of commencement reckoned from 21.2.15 Pre Project activities are in progress.
4	Construction of two New Off-shore Container berths & Development of Container Terminal berth on BOT basis in Mumbai Harbour.	Mumbai Port	9.60MTPA (1.00 Mn TEUs)	1481	BOT Component- Entire Approach jetty is ready. Berth structure completed. Total investment till date is Rs. 627.25 crores. M/s. ICPTL has proposed to procure container handling equipment from 2 Chinese vendors. Details of vendors have been forwarded to ministry on 31.7.14 for security clearance. Development of container yard in Princess Dock is in progress. MbPT component- Fresh tenders for balance work of dredging and filling dock enclosure have been invited. i) The Board in its meeting held on 25.4.14 has accepted the bid of M/s International Seaport Dredging Ltd., for award of work subject to Govt. sanction to RCE, which is yet to be received. ii) Work order for balance filling work and dock closure placed on 4.4.14. Work of Princess Dock filling completed. Victoria Dock

					<p>filing work is in progress. RGD work is in progress.</p> <p>iii) Trial operation of berth facilities has been successfully done on 26.11.14. The Board on 18.1.15 has approved alternate use of OCT project for handling automobiles with revenue sharing on trial basis for a period of 3 months.</p>
5	Development & Operation of International Container Transshipment Terminal (ICTT) at Vallar-padam	Cochin Port	40 MMTPA	2118	Phase I of the ICTT Project with an investment of Rs. 1,262 crores partly commissioned on 11 th February, 2011. The trade circular notifying cabotage waiver for the terminal was issued on 21.12.2012
6	Setting up of LNG Port & Re-Gasification Terminal at Puthuvypeen by Cochin. / Cochin Port Trust	Cochin Port	5 MMPTA	4150	<p>The project is implemented by M/s Petronet LNG Ltd. (PLL). 33.40 Hectares of land at Puthuvypeen handed over to M/s PLL on lease for setting up Re-gasification facilities.</p> <p>The concession Agreement between Cochin Port Trust and M/s PLL has been executed on 12.3.2009. The LNG Terminal area has been declared as Customs Area for the purpose of loading and unloading of goods as per Customs Notification dated .1.4.13. The first LNG ship berthed on 20.8.13. The capacity utilization of the Terminal is only 5%. LNG bunkering was done for the first time in Asia at Cochin Port on 25.2.15 for a Chinese built vessel en route to Norway. PLL has received a consignment for storage and re-export from a trader on 18.10.14.</p> <p>The Gas pipeline network is being implemented by GAIL.</p> <p>LNG Terminal dedicated to the Nation on 04/01/2014. The port has taken up the issue of expediting the provision of RoU for laying the pipeline with the State Government. Meeting held to review the progress of pipe laying work on 27.2.15.</p>
7	Multi-User Liquid Terminal (MULT) at Puthuvypeen SEZ. (International Bunkering Terminal at Cochin)	Cochin Port	4.42 MMTPA	240	<p>Gols in principle approval for assigning the MULT projects to IOCL on nomination basis as per letter dated 11.3.13. The project was assigned to IOCL subject to certain conditions.</p> <p>The concession Agreement signed with IOCL on 04/04/2014. Application to KSPCB for conducting public consultation and application to KCAMA for CRZ clearance for MULT project were submitted on 11.6.14. A fresh on line application to MoEF for obtaining Environmental Clearance uploaded on 18.4.15 after changing the project sector from Industrial to Infrastructure and Misc. Projects + CRZ. DC, SEZ conveyed the approval of the Ministry of Commerce & Industry on 12.8.14 to M/s IOCL for undertaking additional activities in consultation with development of MULT in Puthuvypeen SEZ.</p> <p>M/s IOCL have entrusted with CoPT, execution of construction of jetty and its associated facilities through EPC contractor.</p>

					M/s L&T Ramboll Consulting Engineers Ltd. Chennai was entrusted with preparation of FEED Document and Bid document for the Development of MULT. On tendering two bids on due date, Price bid of the one prequalified bidder opened and IOCL's concurrence for awarding the contract is awaited. Tender for Capital Dredging for MULT basin is also invited with due date of submission on 20.4.15.
8	Setting up of Mechanized Iron Ore handling facilities at berth No. 14 by M/s. SICAL Logistics Limited on BOT basis.	New Mangalore Port Trust	0.62 MTPA (Capacity of Jetty)	296.03	The concession was awarded to M/s. SICAL on 03.06.2010. The Concessionaire has not commenced the work due to ban on export & movement of iron ore imposed by Karnataka Govt. The Concessionaire has requested to excuse for performance under Force Majeure clause. M/s. SICAL was given one more opportunity to commence the work before 8.4.2014 and give milestone accordingly, failing which necessary action may be taken to terminate the contract as per the provisions of Concession Agreement. As resolved by the Port Trust Board a letter to M/s. SICAL is issued on 08.10.2013, & reminder letter sent on 09.01.2013 reply is awaited. Programme is not yet submitted by M/s. SICAL. M/s. SICAL has filed writ petition against the board of Trustees NMP under article 226 & 227 of constitution of India. Hon'ble High Court has given interim order date 20 February 2014 in the said W.P. disposal of writ petition. 1. Stay any further action that may be taken in relation to termination of the concession agreement between the Board of Trustees of the NMPT & M/s. SICAL. 2. Stay of the enforcement of any of the terms of the invoking / encashing the Bank Guarantee issued on behalf of M/s. SICAL in terms of the Concession Agreement and from receiving any money under bank guarantee. Port is in process of vacating the stay. Hearing of the case has been completed and judgement may be pronounced on the next date.
9	Development of Barge handling facility at Bharathi Dock	Chennai*	1.35 MTPA	27.29	Concession agreement signed with Chennai Bunkering Terminal Pvt. Ltd., on 30.3.2013. Due to non-receipt of environment clearance and has requested by the concessionaire the date for fulfilling conditions precedent extended upto 31.07.2014. L&T Ramboll consulting Engineers Ltd., is appointed as an Independent Engineer. WAPCOS Ltd., is appointed as consultant for preparation of EIA and assisting Chennai Port for obtaining Environmental clearance. MoEF accorded CRZ & Environment clearance on 27.08.2014. The Port has consider the request of concessionaire and extended the time for fulfilling the conditions precedent upto 30.11.2014.
10	Development of WQ 6 berth in Inner Harbour for handling	Visakhapatnam*	2.08	114.5	Physical progress 81.15% Likely date of completion December, 2014. Concession

	Multipurpose cargo at IH.				Agreement signed on 31.07.2010 with M/s West Quay Multi Port Pvt. Ltd.
11	Development of EQ-10 berth in Inner Harbour for handling Liquid Cargoes at IH.	Visakhapatnam*	1.84	55.38	Physical progress 97%. Likely date of completion December, 2014. Concession Agreement signed on 18.08.2010 with M/s AVR Infrastructure Pvt. Ltd.
12	Development of EQ-1A berth on south side of EQ-1 berth in Inner Harbour for handling Thermal coal and Steam coal at IH.	Visakhapatnam*	7.36	313.39	Physical progress is 55.60 % Expected completion by March, 2015. Concession Agreement signed on 03.02.2014 with M/s. SEQ Vizag Coal Terminal Pvt. Ltd.
13	Installation of mechanized Fertilizer handling facilities at EQ-7 at IH.	Visakhapatnam*	5.21	217.58	Concession agreement signed on 18.05.2012. Letter of award given on 18.04.2013. Concessionaire has to submit 5 yrs. License fee as refundable security deposit. Termination notice issued on 05.04.2014.
14	Up-gradation of the existing facility (OHC) and creating new facility (WQ-1) for iron ore handling.	Visakhapatnam*	23	845.41	LOA issued on 31.05.2013 to M/s Vadinar Oil Terminal Ltd. Concessionaire agreement signed on 13.12.2013 and compliance of conditions precedent on either side is under progress.
15	Extension of existing Container terminal in outer harbor.	Visakhapatnam*	0.54 MTEUs	633.11	LOA issued to M/s VCTPL on 31.12.2013. Concession agreement is to be signed. Selection of independent Engineer is in progress.
16	Development of Deep Draft Coal Berth on BOT basis	Paradip Port	10.00	479.01	Project site has been cleared and PPT has communicated the same to ESSAR on 10.3.15 informing to deposit the license fees and take over physical possession of the site including submitting documents for fulfillment of their conditions precedent.
17	Conversion of berth No. 8 as container terminal on.	Tuticorin*	7.2 MTPA	312.23	LOA issued to M/s Dhakshin Bharath Gate way Terminals Pvt. Ltd. 7.8.12 with a gross revenue share of 55.18%. Concession Agreement signed on 4.9.12. Work is in progress. Two number of reach stackers arrived and firm has taken action to purchase shore crane. M/s STUP Consultant, Chennai is appointed as Independent Engineer for the project. Partial operation has started on 11.5.2014.
18	Construction of North Cargo Berth I (Captive use)	Tuticorin*	6.30 MTPA	494 for berth construction and 60000 for power plant.	Berth construction completed on 24.07.2012. Conveyor work and installation of shore unloader facilities completed.
19	Construction of One Number of Shallow Draught Berth on DBFOT Basis.	Tuticorin*	2.67 MTPA	84.08	LOA issued to M/s Transstroy OJSC consortium on 31.12.12 with a Gross revenue share of 22%. Concession Agreement signed on 17.4.13. Revalidation of Environmental Clearance received from MOEF vide letter dated 31.03.2014. Consent to establish obtained by the concessionaire from TNPCB vide letter dated 21.02.2014. Further action in being taken to handover the project to the PPP operator.

20	Development of North Cargo Berth II on DBFOT basis.	Tuticorin*	7.0 MTPA	332.16	The Concession agreement signed with concessionaire M/s Tuticorin Coal Terminal Pvt. Ltd. Mumbai on 11.9.2010. About 84% of work completed at site physically. Tender process completed to carry out dredging work in front of the Berth by the Port and awaiting environment clearance from MOEF. Security clearance issued at Port level on 30.06.14 for import of equipment from China.
21	Development of North Cargo berth III	Tuticorin*	9.15	420	V.O.CPT accorded approval to issue LOA in favour of the H1 Bidder M/s. Transstroy OJSC Consortium at a Gross Revenue Share of 30%. The concession Agreement signed on 07.02.2014. Capacity Addition of 9.15 MTPA. For the appointment of Independent Engineer tender was opened on 03.07.2014 and tender evaluation is in progress.
22	Development of North Cargo berth IV	Tuticorin*	9.15	355.0	LOA was issued to M/s Transstroy OJSC Consortium on 30.01.2013 at Gross Revenue share of 30% concession Agreement signed on 17.04.2013. For the appointment of Independent Engineer for the project. Order awarded to M/s. Consulting Engineering Services India Pvt. Ltd on 25.08.2014.
23	Upgradation of Mechanical Handling infrastructure at V.O. Chidambaranar Port Trust (Berth I to VI & IX)	Tuticorin*	8.72 MTPA	48.2	LOA issued to M/s IMC PSTS Consortium on 25.3.13 with a gross revenue share of 26.55%. Concession Agreement signed on 24.5.13. Condition precedent was fulfilled on 31.08.2013. Cranes received from Germany on 27.02.2014 and commercial operation commenced from 24.03.2014.
24	Development of Coal handling terminal at Berth No.7 of Mormugao Port on Design, Build, Finance, Operate and Transfer (DBFOT) basis	Mormugao Port Trust	4.61	406.0	Mormugao Port Trust commenced Commercial Operation w.e.f. 6 th June, 14. The Independent Engineer issued work completion certificate on 10.11.14.
25	Development of Fourth Container Terminal at JNP on DBFOT basis	JNPT	60 MTPA	7915	The Concession is awarded to Bharat Mumbai Container Terminals Pvt. Ltd. On 22.12.14. Concessionaire has awarded the work of dredging and reclamation. The reclamation work commenced in March, 15.
26	Development of standalone handling facility with a quay length of 330 m to the North at JNPT	JNPT	10 MTPA	600	The Concession has completed the wharf construction work. RMQCs are installed, JNP Board has allowed for partial commissioning of the project, which is likely to commence in May, 2015.
BOT: Build Operate and Transfer; BOO: Build Own Operate; DBFOT: Design, Build, Finance, Operate and Transfer.					

*: Information relates to September, 2014

**Private Sector/Captive/Joint Venture Port Projects Under Formulation
(Major Ports)**

Sl. No	Project	Port Name	Capacity (Million Tonnes)	Project Cost (Rs. In crores)	Project Status
1	2	3	4	5	6
1.	Development of Multi-Purpose berths to handle clean cargo including container on BOT basis at Paradip Port.	Paradip Port	5.0 MTPA	430.78	Concession Agreement has been signed with the SPV Paradip International Cargo Terminal (Pvt.) Ltd. on 7.3.15 with revenue share of 11.044%.
2.	Mechanization of EQ 1 to EQ 3 berths at Paradip Port on BOT basis.	Paradip Port	30	1437.76	Based on the observations of Department of Economic Affairs(DEA) & NITI Aayog and the deliberations during the meeting taken by DA(Ports) and Dy. Secretary(PD) at Paradip Port on 13.4.15. The revised PPPAC documents have been submitted to Ministry on 17.4.15.
3.	Development of Deep Draught Iron Ore Berth on BOT basis at Paradip Port.	Paradip Port	10	740.19	Letter of Award has been issued in favour of H1 bidder i.e. consortium of JSW Infrastructure Ltd. & South West Port Ltd. on 5.2.15 at 21 % revenue share to the Port. They are in the process of formation of SPV for this project with whom the concession agreement will be signed.
4.	Development of LNG Terminal	Kamarajar Port Ltd	5.00	5151	MoU was signed with IOCL on 1.3.14.
5.	Construction of Coal Berth-4	Kamarajar Port Ltd	9.00	325	NIT was issued on 24.2.15 Scheduled to award the work by June/July.15.
6.	Development of Marine Liquid Terminal -2 on DBFOT Basis	Kamarajar Port Ltd	5.00	-	DFR has been prepared by Project advisor
7.	Development of Second Automobile Export Terminal on DBFOT Basis	Kamarajar Port Ltd	3.00	-	DFR is under preparation
8.	Dredging & Infrastructure development for handling bigger ships at 18 to 22 ID Harbour Wall Berths.	Mumbai	8.00 MT	813	The project is earmarked for implementation through PPP mode. RFQ document advertised on 3.7.13. No offer were received within due date. The project parameters are being reviewed by Transaction Adviser M/s RITES to make the project attractive and viable. RITES has been reminded to give their suggestions/opinion at the earliest. -Tariff fixation proposal sent to TAMP on 16.8.13. TAMP passed the orders on 19.12.13, and notified in the Gazette on 20.1.14. -EAC has recommended for extension of validity of Environmental Clearance for 5 years. Extension of validity of Environment Clearance is received on 4.2.14.
9.	Development of off-shore multipurpose cargo berth	Mumbai	4 MT	696	The project is earmarked for implementation through PPP mode. - M/s RITES has been entrusted with the work of updating the project report.

					<p>vide letter dated 28.8.14, Report not yet submitted by M/s. RITES.</p> <ul style="list-style-type: none"> - Application for TOR for EIA/RA study, required for prior Environmental Clearance of the project forwarded to Secretary, Environmental Department, GOM on 16.4.13. - Approval to TOR received.
10.	Development of facilities for handling & storage of bulk cement	Mumbai	1.25 MT	95	The tender has been awarded on 23.3.15 for development of Cement Terminal. The time frame for completion is 24 months.
11.	Award of Project for Base Oil Terminal	Mumbai	-	-	The project is temporarily kept in abeyance as the site is under consideration of MPLDC
12.	Development of Marina- Off P & V Dock Wall	Mumbai	-	-	The earlier Tender on Land lease model has been cancelled. It has been decided to re-invite the Tender on Revenue share Model.
13.	Barge handling facilities at Khori Creek	Kandla*	4	100	Under planning stage
14.	Construction of T shape Jetty at at Tekra (Phase-II)	Kandla*	14	1500	The scheme will spill over in 13 th five year plan. Under planning stage.
15.	Setting up of barge jetty at Tuna on captive use basis	Kandla*	1.5	22	EOI invited. Only M/s Shree Renuka Sugars has submitted application till due date. Committee recommended the proposal submitted by M/s Shree Renuka Sugars and also recommended to put up to the Board for approval.
16.	Construction of barge jetty at Tuna on BOT basis	Kandla*	5.49	255.3	Feasibility Report, RFQ and TAMP proposal under approval.
17.	Strengthening of oil jetty 1 & 2 to handle 13/14 m draught vessels	Kandla	1.57	14.29	LOA issued to M/s Indiana build infrastructure pvt. Ltd., Mumbai on 16.03.14, work order issued on 20.5.2014.
18.	Development of Port based multi product SEZ	Kandla*	-	1095	In-principle approval from MoS for formation of SPV is awaited. Concurrence of GoG is still awaited. KPT has appointed NIO, Mumbai for carrying out EIA studies
19.	Development of General Cargo Terminal at Q8-Q9 berths (Modernization of Coal Handling at Cochin Port)	Cochin Port	4.23 MTPA of Coal	198.2	The project was to develop a 300 metre berth length of Q8-Q9 berths as a dedicated Coal only terminal, with 14.42 ha of backup area and involving investment of around Rs. 196 crores. Tenders were invited thrice for the project, no response was received. During the review meeting on 24.2.15, it was decided to rejig the project by providing 14.5 m draft and decking the 300 m stretch of the berth and also revising the cost estimates of the existing components and apply for VGF to Govt. of India to improve the IRR. The assignment for providing consultancy services for preparation of a Feasibility Report for Development of a Coal Terminal at Cochin Port is awarded to M/s Alla Consulting Solutions Pvt. Ltd., Mumbai on 31.3.15.
20.	Construction of 1 No. shallow water berth for handling construction materials	Tuticorin	2.00 MTPA	65.37	Court case filed by M/s Indian Port Terminal, Tuticorin. The matter is at Hon ble Madras High Court, Chennai. Hearing completed and awaiting for judgment. Port filed implead petition.
21.	Development of Outer Harbour (17 Nos. of berth including	Tuticorin	19.20 MTPA (16,00,000	23431.92	During the review meeting dated on 03.08.2012, a decision was taken to go for preparation of fresh DPR since the existing one was prepared in 2007 and there

	constructions of Breakwater and Dredging)		TEUs		<p>was much variation in the traffic profile.</p> <p>Accordingly Global NIT was published. After evaluation, work order for the preparation of Detailed Project Report was issued to M/s. I-Maritime, Mumbai on 26.02.2013 with a contract period of 9 months from the date of award of work order. The firm has presented the draft DPR in the final DPR on 19.10.2013. As per the final DPR channel is (-) 18m. The total cost of the project is Rs.23431.92 Crores in four phases.</p> <p>The first phase is Rs. 11,636 Crores which consists of Dredging, breakwater and road of Rs. 7241.89 Crores including interest during construction and the balance to be borne by the PPP operators. Total traffic for phase I is 85.8 Million Tonnes per annum.</p> <p>On completion of four phases port will have a capacity addition of 280 MTPA. Investment by Port for Phase 2, 3, & 4 developments is nominal and main investment will be made by the PPP operators. A fresh application on seeking approval for Terms of References submitted to MOEF on 5.03.2014. EAC prescribed to conduct public hearing. Accordingly offers called from accredited agencies for conducting EIA studies on 27.8.2014. Five offers received and tender opened on 15.09.2014. Work order issued. Mathematical Physical model study being carried out by CWPRS, Pune. Action is being taken to conduct bore hole investigation and hydrographic survey and seismic survey for finalization of Break water layout and dredging quantities.</p> <p>Port has engaged M/s I.P.A for revalidating the D.P.R submitted by M/S i-maritime.</p>
22.	Development of Mega Container Terminal.(Development of a new Outer Harbour on BOT basis)	Chennai**	(48 MTPA)	5100	<p>The mega container terminal project is being restructured and port has appointed M/s. Ernst & Young as consultant for preparing feasibility study and TA.</p>
23.	Development of Rajiv Gandhi Dry Port and Multi Modal Logistic Hub at Mappedu near Sipertumbudur, under PPP mode	Chennai** Port Trust	18.45 MTPA	415	<p>Lease Deed executed for 120.85 acres and 0.89 and 0.89 acres on 29.6.2012 and 20.3.2013 respectively for the total land area 121.74 acres acquired for SIPCOT handed over the land area and taken over by Chennai Port on 31.05.2013.</p> <p>On the bid due date, no bids were received. Project restructuring options placed in the Board Meeting held on 03.08.2013.</p> <p>Proposal invited on tender-auction basis for a period of 30 years based on the latest Land Policy Guidelines 2014.</p> <p>Two offers received for 14.96 acres only. Letter of Intent issued to the Successful bidder Ennore Cargo container Terminal on 04.07.14. subject to issue of LOA will be issued on receipt of written consent from SIPCOT for sub-lease.</p> <p>SIPCOT has demanded License Fee for sub-lease. In response ChPt requested SIPCOT not to insist for payment of license fee, for which a reply is awaited from SIPCOT.</p> <p>Tender re-invited for balance portions from 25.09.2014.</p>
24.	Development of Dry Dock /Ship Repair facility at Timber pond/Boat basin in Chennai Port on Private Sector Participation (Land Lease	Chennai** Port Trust		315	<p>it has been decided to re-invited the tender with same scope of work as CSL is not interested to take up the project.</p> <p>Tenders were re-invited with the Terms & conditions as in original invitation. Sale of tender document is from 28.6.14. Second Pre-Bid meeting held on 10.10.2014.</p>

	Model) for a lease period of 30 years				Bid submission extended up to 12.11.14. Apart from private bidders, Coast guard has also expressed interest in participating in the project.
25.	Development of Marine Highway along East Coast connecting Chennai and Kmarajar Ports	Chennai* *Port Trust		6	Tender for marine Highway Project were invited from 5.3.2014. To promote the project, Chennai Port conducted Road Shows at Goa & Mumbai on 5.4.2014 & 16.4.2014 with Goa Barage Owner Association and ICC Shipping Association respectively to elicit the views of the Barge Owners and concerned stakeholder. An interactive session was held on 7.5.2014 with stakeholder, ChPT Terminal Operators, CCPTL & CIPTL, Customs CFS Operator including CWC, Linear operators, CSAA, CHA and KPL to discuss on the various aspects of the project and whether to operate Ro-Ro or Lo-Lo. KPL agreed to waive Pilotage charges subject to their providing a restricted Pilot License to the Master of the Barge having the certificate of Competency as Master (FG) after giving a brief training for a period of one month followed by the examination. There are some issues viz; Statutory requirements from customs & Mercantile Marine Departments needs relaxation. These issue are being resolved in consultant with respective Authority. A meeting was initially held with the Dy. Commissioner, Customs on 21.7.14 to discuss the Customs related issues. Bid submission date was extended to 14.11.14
26	Development of JD (East) berths as Multi-cargo Terminal	Chennai* *Port Trust	5	369	The proposed Terminal will handle Multi-cargoes viz sugar, food grains granite, limestone slag & finished steel products. Board approved the proposal at its meeting on 25.6.2014 and recommended further action including invitation of RFQ, RFP etc. Pre-Bid Conference held on 22.7.2014 with prospective Developers. RFQ document is on sale from 15.9.2014 with the bid due date extended to 14.11.2014. Reference Tariff proposal was forwarded to TAMP, SFC memo has been forwarded to MoS for project approval.
27.	Construction of a riverine jetty south of 2 nd Oil Jetty through DBFOT Basis.	Haldia Dock Complex under KoPT *	1.5 MTPA	471	Feasibility Study being undertaken, following which RFQ document would be issued.
28.	Construction of a riverine jetty south of 2 nd Oil Jetty through DBFOT Basis.	Haldia Dock Complex under KoPT *	1.5 MTPA	471	Feasibility Study being undertaken, following which RFQ document would be issued.
29.	Construction of a riverine jetty south of 2 nd Oil Jetty through DBFOT Basis.	Haldia Dock Complex under KoPT *	1.5 MTPA	471	Feasibility Study being undertaken, following which RFQ document would be issued.
30.	Construction of a riverine jetty south of 2 nd Oil Jetty through DBFOT Basis.	Haldia Dock Complex under KoPT *	1.5 MTPA	471	Feasibility Study being undertaken, following which RFQ document would be issued.

31.	Construction of a riverine jetty south of 2 nd Oil Jetty through DBFOT Basis.	Haldia Dock Complex under KoPT *	1.5 MTPA	471	Feasibility Study being undertaken, following which RFQ document would be issued.
32.	Deepening of Approach channel for Cape size vessels at Mormugao Port	Murmugao	2.00 MMTPA	301.1	1.M/s WAPCOs has been appointed for carrying out Environment Impact Assessment (EIA) study 2. Work order issued to M/s CQPRS for carry out Mathematical Model studies for Hydrodynamics and sedimentation. 3. Three parties were qualified for issue of RFP. RFP issued to the parties on 24.2.15. Pre-bid meeting held on 11.3.15. 4.SFC memo submitted to Ministry of 13.1.15. SFC meeting held on 4.3.15. During the SFC meeting, the Ministry directed the Port to shift from the present Revenue share model to Annuity model. Project is being reviewed and fresh RFQ will be invited based on the new model. Accordingly the Annuity Model was explored by our consultant M/s SBI Caps Ltd. The same was examined by Ministry. As such NIT for issue of RFQ based on Annuity Model is issued on 17.4.15
33.	Development of Port Handling Facilities for the 1 st Phase of the Master Plan. i) Conversion of the existing Mechanical Ore Handling Plant(MOHP), Berth No.8, Berth No.9 and Barge Berths to Multipurpose Cargo berths ii) Shifting of the existing POL Handling Facilities from Berth No.8 to an offshore location between Mooring Dolphins 1 & 2 iii) Development of Dry Port at Belgaum	Murmugao	9.00 MMTPA 2.00 MMTP 30000TEUs	525 200 15	NIT for appointment of consultant for preparation of feasibility report was issued on 25.3.15 and the date of opening of the bid is on 30.4.15. Draught feasibility will be submitted by Consultant after 3 months from date of appointment.
BOT: Build Operate and Transfer; BOO: Build Own Operate; DBFOT: Design, Build, Finance, Operate and Transfer.					

*: Information relates to March, 2014

** Information relates to September, 2014

**Ongoing Private Sector/Captive/Joint venture Port Projects
(Non-Major Ports)**

Sl. No	Project Name	State/ Ports Maritime Board	Capacity (Million Tonnes)	Project Cost (Rs. In Crore)	Project Status
1	2	3	4	5	6
1.	Development of Mundra Port	Mundara (Gujarat)	132	12305	Construction of 4 berths alongwith backup facilities has been completed. Phase-I of the Project completed & Operational 1.810 m Multipurpose jetty 2.1843 m container terminal & T-2 3. 1 SBM and other back up facilities Phase-2: 1. 1510 m Coal Terminal, Wandh-Operational 2. 810 m Container Terminal Operational 3. Second SBM Operational 4. Multipurpose 3 Operational 5. Out of two proposed LNG Berths under Phase-II, Proposal for granting in principle approval to be developed in JV with GSPC LNG Ltd., has been submitted to GOG. The same is yet to be received. Meanwhile construction permission to GLL has been issued.
2.	Hazira Port Pvt. Ltd (HPPL)	Hazira (Gujarat)	2.50 (MMTPA)	1180.4	Phase 1 A (LNG Terminal) completed and operational.
3.	Development of BGCT under phase IB at Hazira,	Hazira (Gujarat)	24.6	267.6	Completion of construction of the following: 1) 2 container berths and 3 general cargo berths 2) breakwater 3) backup facility for handling the cargo.
4.	Development of Solid Cargo Port Terminal	Dahej (Gujarat)	15	84	Two solid cargo berths with cranes completed 1) Backup area constructed 2) Conveyor system for berths no. 1 completed as per DPR.

5.	M/s Essar Bulk Terminal Limited	Selaya (Gujarat)	5	208.8	Construction of Jetty and approach trestle completed, Construction of approach bund under construction
6.	M/s ABG Cement Ltd	Mora Surat (Gujarat)	3.30	10.4	On receiving of the possession of the approach and land for jetty from GoG, the company will started the construction work.
7.	M/s Ultra Tech Cement Ltd (Expansion)	Kovaya Pipavav (Gujarat)	5	17.1	Construction work of 210 mt jetty has been completed. Mechanism works under progress.
8.	M/s Cairn Energy India Pvt. Ltd. SPM and Pipeline Bhogat Dist. Jamnagar	Bhogat (Gujarat)	7	1285	Construction completed, land place declaration awaited
9.	M/s Sanghi Industries Ltd. Captive Jetty (Expansion) Jakhau Port	Jakhau Port	6.40	455	Environment clearance awaited.
10.	Development of an all weather and Multipurpose port at Rewas-Aware, Dist. Raigad	Thal*, Rewas-Aware Maharashtra	43	5200	All clearances including Environmental clearance in place. Pre- construction activities in progress. Right of way through Mumbai Port Trust waters for navigation channel of Rewas-Aware port is still awaited. Matter taken up with Ministry of Shipping, Govt of India.
11.	Development of an all weather and Multipurpose port at Dighi, Dist. Raigad	Rajpuri* (Dighi) Maharashtra	35	3500	One berth has become operational.
12.	Development of an all weather and Multipurpose port at Dhamankhol- Jaigad Port Dist. Ratnagiri	Jaigad*, (Dhamankhol Bay) Maharashtra	36	2900	Two berths in first phase have been commissioned. Detailed Project Report for second phase of the project has been approved and the Proposal for environmental clearance is under consideration of the Ministry of Environment & Forests, Govt. of India
13.	Development of an all weather and Multipurpose port at Lavgan- Jaigad Port Dist. Ratnagiri (Cargo facility + Ship Repair system)	Jaigad*, (Lavgan- Bay) Maharashtra	18	700	Cargo berth facility has been commissioned and commercial operations are likely to start shortly. The Ship repair facility is likely to commission by end December 2013.
14.	Development of an all weather and Multipurpose port at Vijaydurg Port Dist. Sindhudurg	Vijaydurg*, Maharashtra	12	2275	Detailed Project Report is received. The Ministry of Environment & Forests, Govt. of India has yet to issue Terms of Reference (ToR) for environmental clearance due to moratorium imposed upon projects in Ratnagiri and Sindhudurg.

					districts.
15.	Development of an all weather and Multipurpose port at Redi Port, Dist Sindhudurg	Redi*, Maharashtra	19	716	Detailed Project Report has been approved. All formalities for obtaining environmental clearance have been completed and the project is awaiting environmental clearance from ministry of Environment & Forest, which is pending due to moratorium imposed upon projects in Ratnagiri and Sindhudurg districts.
16.	Demolition and reconstruction of Capt of Ports Jetty at panaji.	Panaji-Port Goa	*	150.06	Almost in completion stage. * The jetty will cater to low craft passenger vessel and other small crafts. No cargo will be discharged/ loaded at this jetty.
17.	Demolition of old existing jetty and reconstruction of new Capt. Of Ports jetty at Old Goa.	Panaji-Port Goa	*	203.60	70% work of construction is completed. * The jetty will cater to low craft passenger vessel and other small crafts. No cargo will be discharged/ loaded at this jetty.
18.	Establishing a captive port at Parangipettai by M/s IL &FS Limited	Parangipettai Tamil Nadu	13 MMTPA	1349	Construction yet to be commenced.
19.	East Coast Energy Pvt. Ltd.	Meghwaram** Andhra Pradesh	Captive Port	2370	To commence by last quarter of 2017.
20.	Anrak Aluminum Ltd.	Nakkapali** Andhra Pradesh	5	4790	No development so far
21.	-	Bhavanapadu** Andhra Pradesh	6.45	2362	DPR under process.
22.	-	Calingapatnam* Andhra Pradesh	6.45	2362	Not be to be developed as indicated by GoAP

23	KSEZ	KSEZ* Andhra Pradesh	37.93	-	To be finalized.
24	Phase-2-Development of Krishnapatnam Port	Krishnapatnam* * Andhra Pradesh	44.30(Bulk & Gen Cargo) 3.30 MTEU (Container)	6600	Under construction
25	Expansion, Development of Dhamra Port (PPP Mode)	Dhamra Port, Orissa	25 MTPA to 109 MTPA	10016	(i) Phase-I is in operation from 6.5.2011 (ii) Phase-II Development is in progress.
26	Expansion, Development and Operation of Gopalpur Port(PPP mode)	Gopalpur Ports Ltd.Orissa	0.55 MTPA to 54 MTPA	1411	i) MoEF Clearance received on 30.03.2011 ii) Developmental activities are in Progress iii) All Weather Direct Berthing Port declared open for commercial Traffic with effect from 29 th March 2013 iv) The Port operation has been suspended due to last Cyclone PHAILIN
27	Development of Karaikal Port through private investment on BOT basis	Karaikal, Puducherry	Phase 2A 21.5 Phase 2AE 6.5	1600 500	Phase -2A and 2AE Works are in progress.
28	Development of Pondicherry Port through private investment on BOT basis	Pondicherry	Phase - I 16.2 Phase - II 10.8	2785 N.A	Developer has gone for Arbitration and the same is in progress.

29.	Captive port owned by M/s Chemplast Sanmar, Chennai.	Captive Maritime Terminal facility, Karaikal, Puducherry	Nil	Nil	Commercial operations commenced in September 2007 and are functioning.
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Source: Maritime States/Maritime Boards

*-Information relates to March, 2014

** - Information relates to September, 2014

**Private Sector/Captive/Joint Venture Port Projects Under Formulation
(Non-Major Ports)**

Sl. No	Project	State/ Ports Maritime Board	Capacity (Million Tonnes)	Project Cost (Rs. In Crore)	Project Status
1	2	3	4	5	6
1.	GCPTL Proposed 2nd liquid jetty & allied infrastructure.	Dahej (Gujarat)	2.5-3.5 (estimated)	2500 (estimated)	Techno- Commercial Feasibility study is under progress.
2.	Sterling Port Limited	Dahej (Gujarat)	41 (Phase -I)	2501.8	Under Construction.
3.	Petronet LNG Ltd. 2nd jetty	Dahej (Gujarat)	2.5	612	Construction completed & operational
4.	Development of Chhara Port	Chhara (Gujarat)	8	1200	CA signed on 29.1.2015 Environment Clearance received. Financial closure is under process.
5.	Development of Greenfield port.	Modhawa (Gujarat)	Developer Under selection at GoG Level		
6.	Development of Greenfield port by M/s. IL & FS	Khambhat (Gujarat)	Keep on hold due to Kalpsar Project		
7.	Development of Greenfield port by Ms. JK Cement Group	Dholera (Gujarat)	Keep on hold due to Kalpsar Project		
8.	Development of Nargol Port	Valsad (Gujarat)	20	4300 (Estimated)	
9.	M/s Essar Bulk Terminal limited (3 rd Expansion)	Hazira (Gujarat)	20	154.8	Construction permission is under consideration for 1100 mt jetty
10.	M/s Reliance Industries Limited Second SPM	Hazira (Gujarat)	4	.35	GMB granted final permission of Construction
11.	M/s Universal Success Enterprise Ltd.	Gojiness (Bhogai) Gujarat)	5	126	Environmental clearance awaited

Sl. No	Project	State/ Ports Maritime Board	Capacity (Million Tonnes)	Project Cost (Rs. In Crore)	Project Status
1	2	3	4	5	6
12.	M/s Sealand Port Pvt. Ltd (a group company of IL&FS) Coal Jetty & Multipurpose Jetty	Nana Layja, Kutch	17	2605	In principle approval has been granted for development of coal jetty at Nana Layja. In principle approval for Multipurpose jetty is under consideration at GoG level
13.	M/s Ahir Salt & Allied Products Pvt Ltd.	Mithi Rohar, Kutch	5	160	NOC has been granted to M/s Ahir Salt & Allied Products Pvt. Ltd. for carrying out studies and investigation for revival of marine facilities and defined new port limit for the project.
14.	M/s Archean Chemical Industries PM. Ltd.	Budh Bandar, Koteswar	2	135	In principle approval has been granted for development of Captive Slot jetty at Budh Bandar near Kaiyari Village in Kutch
15.	M/s Gogrej & Boyce Mfg. Co. Ltd	Dahej (Baruch)	5	5	Environment clearance has been issued by MoEF, Delhi. Final construction permission for Ro Ro Jetty is under consideration
16.	M/s ISGEC Heavy Engineering Ltd	Dahej (Bahruch)	3	54.92	Environment clearance has been issued by MoEF, Delhi. Final construction permission for Ro Ro Jetty is under consideration
17.	Captive port facility by M/s. Udangudi Power Corporation Ltd.	Udangudi Thoothukudi Tamil Nadu	6	9083	Port has been notified. Development under process.
18.	Captive port facility by M/s. Coastal Tamil Nadu Power Ltd.	Cheyyur, Kancheepuram Tamil Nadu	13	16000	The Port limits are yet to be notified.
19.	Captive port by M/s. Chettinad Power Corporation Ltd.	Tharangambadi Taluk Nagapattinam Tamil Nadu	3.5	7500	Port has been notified. Development under process.
20.	Captive port permitted to handled other commercial cargo by M/s. Nagarjuna Oil	Thiruchopuram in Ouddalore Tamil Nadu	9.3	384 (Captive facility only)	Port has been notified. Development under process.

Sl. No	Project	State/ Ports Maritime Board	Capacity (Million Tonnes)	Project Cost (Rs. In Crore)	Project Status
1	2	3	4	5	6
	Corporation Ltd.				
21.	2nd stage Development of Karwar Port	Karwar* Karnataka	5	150	Issue of bid documents is under progress.
22.	Development of Modern Sea Port at Tadri.	Tadri * Karnataka	34.40	300	IDD Nominated KSIIDC as nodal agency. Preparation of DPR is under progress.
23.	Development of Deep Draft Green field Port at Haldipur	Haldipur *Karnataka (Proposed)	18	190	DPR under progress by Mineral Enterprises Limited, Bangalore.
24.	Development of Honnavar Port	Honnavar* Karnataka	2	20	M/s. Honnavar Port Ltd., has submitted DPR for the approval of the Government.
25.	Captive Port at Manki Port	Manki* Karnataka	1	4.6	M/s. Renuka Sugar is in the process of preparing DPR for construction of captive jetty.
26.	Development of Port at Subarnarekha Mouth (Kirtannia) (PPP Mode)	Subarnarekha Mouth (Kirtannia) Orissa	25 MTPA to 55 MTPA	2345	Land acquisition/alienation process is in progress.
27.	Development of Port at Astaranga (PPP Mode)	Astaranga Orissa	17.70 MTPA to 71.30 MTPA	7342	Land acquisition/alienation process is in progress.
28.	Captive port (PPP) Mode	Chudamani Orissa	3 MTPA to 10 MTPA	N.A.	MoU signed on 22.10.2009 between Government of Odisha and Aditya Birla Group (Essel Mining & Industries Limited)
29.	Development of Bulk Liquid Berth for handling LNG	Karaikal Port, Puducherry	5	1948	Applied for Environment clearance

Source: Maritime States/Maritime Boards

* Information relates to September, 2014

Outlay And Expenditure - Port Sector (Central)

(Rs. in crore)

Port	Annual Plan (2007-2008)		Annual Plan (2008-2009)		Annual Plan (2009-2010)		Annual Plan (2010-11)		Annual Plan (2011-12)		Annual Plan (2012-13)		Annual Plan (2013-14)		Annual Plan (2014-15)	
	App. Outlay	Actual Exp.	App. Outlay	Actual Exp.	App. Outlay	Actual Exp.	App. Outlay	Actual Exp.	App. Outlay	Actual Exp.	App. Outlay	Actual Exp.	App. Outlay	Actual Exp.	App. Outlay	Actual
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
Kolkata (a)	37.37	33.28	44.97	33.64	58.00	45.85	50.88	49.76	65.73	21.29	28.45	17.34	38.03	5.88	43.75	23.64
Mumbai	50.36	29.10	150.00	23.80	182.00	146.09	179.58	116.76	176.97	142.09	279.79	149.30	427.80	24.87	50.00	76.53
JNPT	188.10	70.28	175.17	48.77	304.00	177.94	89.81	38.24	153.69	140.52	341.18	240.21	1559.10	137.58	647.54	294.82
Chennai	47.81	44.41	72.08	48.08	34.00	68.37	243.00	184.46	136.00	4.44	146.00	81.78	107.00	9.20	41.99	4.11
Cochin	158.52	129.07	255.85	246.03	161.97	160.93	299.35	180.08	115.88	92.24	93.45	78.47	129.05	3.40	42.84	17.20
Vishakhapatnam	83.00	35.51	38.97	31.44	65.01	75.74	151.00	121.19	190.00	113.48	102.71	57.82	182.34	29.07	306.88	274.69
Kandla	89.49	38.25	140.87	58.07	115.00	62.64	45.98	52.79	92.27	52.82	188.89	138.44	145.45	29.38	100.00	324.47
Marmagao	10.10	11.18	22.67	17.52	71.00	31.01	66.28	71.52	106.93	66.17	71.36	46.95	110.00	24.75	82.87	61.17
Paradip	100.00	42.26	266.00	101.47	276.51	128.19	196.21	81.26	70.60	74.80	127.31	73.73	96.94	55.85	132.80	85.10
New Mangalore	36.00	25.81	30.60	30.11	34.00	32.48	31.00	24.56	36.00	38.45	36.00	46.60	75.00	8.04	50.00	67.94
Tuticorin	79.46	63.16	96.67	88.12	220.50	39.03	90.34	172.08	291.87	358.65	201.42	42.63	547.62	3.19	600.85	34.69
Ennore Port Ltd.	61.00	34.53	70.00	102.43	65.01	50.52	95.00	70.12	60.00	61.92	73.50	80.83	600.00	28.38	220.00	62.50
Sethusamudram Ship Canal Project	664.22	119.47	1581.67	152.24	161.10	20.98	10.00	6.02	10.81	8.51	4.00	2.12*	5.00	1.42*	0.50	2.94*
WEB Based EDI Port Community System	7.50	0.04	6.00	1.00	3.00	3.33	4.88	4.46	2.38	2.01	2.00	2.00	1.00	##	0.60	0.60
Others (b)	477.20	170.57	596.38	86.50	504.80	161.68	362.88	223.31	675.00	516.68	901.87	575.43	636.00	319.98	464.80	36.61
Survey Vessels	19.00	0.00	75.00	5.00	10.00	9.00	15.00	15.00	15.00	15.00	0.00	0.00##	3.00	0.00##	0.00	9.00
Total	2109.27	884.88	3650.97	1143.70	2416.00	1227.78	1881.28	1392.30	2194.72	1724.37	2574.93	1633.70	4654.30	674.27	2785.72	1398.62

(a) Includes Holdia and RR Schemes.

(b) Includes DQI, A/UW, RSD Studies, Post Tsunami Works, Minor Ports Studies, IT for D/Shipping, Web based PCS Dev of Non-Major Ports etc.

* The amount is received as equity from Gov. of India and other stakeholders.

App. Outlay: Approved Outlay

Not Available

Source: Annual Plan - Port Sector (Dept. of Shipping)/MPA

Commodity-wise Traffic Handled at Major Ports

(000 Tonnes)

Port	Period	POL & its Products	Iron Ore	Thermal Coal	Coking Coal	Ferti. & FRM (Dry)	Food grain	Container	TEUs	Others	Total
1	2	3	4	5	6	7	8	9	10	11	12
Kolkata	2010-11	878	827	0	97	62	11	6220	377	4445	12540
	2011-12	682	450	0	8	69	0	6818	317	4206	12233
	2012-13	708	158	0	9	94	107	6960	463	3808	11844
	2013-14	717	179	211	262	39	27	7063	449	4377	12876
	2014-15(P)	626	133	0	270	54	532	8109	528	5558	15282
Haldia	2010-11	10606	5952	2173	6010	459	0	2835	149	6970	35005
	2011-12	6582	3943	2346	4939	519	3	2619	115	10064	31015
	2012-13	4796	1715	1976	4503	386	0	2869	137	11839	28084
	2013-14	4572	2170	1598	5350	559	0	2230	113	12032	28511
	2014-15(P)	5500	2342	1185	5997	811	0	1957	102	13218	31010
Paradip	2010-11	12845	13795	13280	6060	4362	0	69	4	5627	56038
	2011-12	15091	6556	16404	5159	4783	0	109	8	6152	54254
	2012-13	16467	1833	21403	4702	4146	0	171	13	7830	56552
	2013-14	17602	5593	24743	6872	4054	0	99	9	9040	68003
	2014-15(P)	17976	2181	29932	7876	4429	0	67	4	8550	71011
Visakhapatna	2010-11	19242	19347	3536	7926	4079	203	2572	140	11134	68041
	2011-12	17428	16243	3189	6874	4551	517	4213	234	14405	67420
	2012-13	13501	12569	2951	6795	2588	1121	4554	247	14859	59038
	2013-14	12960	13032	2744	6928	2614	817	4816	202	14493	58504
	2014-15(P)	14040	8365	2779	6074	2568	280	4373	246	18935	58004
Chennai	2010-11	13991	2114	1417	608	771	88	29421	1485	13054	61460
	2011-12	13290	97	610	351	643	190	30076	1555	10460	55707
	2012-13	13376	52	0	0	421	314	29706	1539	9533	53404
	2013-14	12877	0	0	0	415	308	26330	1468	9177	51105
	2014-15(P)	12737	146	0	0	541	37	29945	1552	9135	52541
Ennore	2010-11	509	401	0365	103	0	0	0	0	731	11006
	2011-12	502	0	12846	485	0	0	0	0	1343	14956
	2012-13	521	0	14240	665	0	0	0	0	2439	17885
	2013-14	1275	0	22482	0	0	0	0	0	3580	27337
	2014-15(P)	3188	0	24023	330	0	0	0	0	2710	30251
Tuticorin	2010-11	741	64	5340	0	1901	80	8160	468	6423	26727
	2011-12	630	33	6060	0	2025	307	9227	477	9833	28105
	2012-13	547	0	6689	0	1059	128	9372	476	10465	28260
	2013-14	299	0	6844	0	1178	49	10129	508	10343	28642
	2014-15(P)	607	46	8813	0	1491	60	11034	560	10563	32414
Cochin	2010-11	12121	0	40	0	429	0	4419	310	864	17873
	2011-12	14084	0	34	0	430	0	4715	337	827	20090
	2012-13	14027	0	28	0	353	0	4607	335	830	19845
	2013-14	14289	0	0	0	307	0	4785	343	1505	20886
	2014-15(P)	14017	0	0	98	446	0	5246	366	1788	21595
New Mangalore	2010-11	21551	3744	0	2856	788	116	568	40	1927	31550
	2011-12	22245	3036	0	4022	825	58	645	45	2110	32941
	2012-13	22538	2616	2553	4358	536	204	692	48	3539	37036
	2013-14	22944	3012	2928	5420	504	118	747	50	3692	39365
	2014-15(P)	22973	1474	2726	5452	731	0	921	63	2289	36566
Mormugao	2010-11	939	40625	1633	4933	232	0	220	18	1478	50060
	2011-12	923	29370	1163	5669	93	0	279	22	1552	39049
	2012-13	823	7421	768	6606	78	60	258	20	1724	17738
	2013-14	527	44	0	7518	179	44	236	19	3191	11739
	2014-15(P)	571	758	2000	6568	227	0	312	25	4275	14711
J. L. Nehru	2010-11	5043	0	0	0	870	0	56426	4332	1978	64317
	2011-12	4845	0	0	0	4	19	58233	4317	2629	65730
	2012-13	4126	0	0	0	0	0	57911	4258	2451	64488
	2013-14	4107	0	0	0	0	0	55235	4182	2991	62333
	2014-15(P)	4034	0	0	0	0	0	56933	4467	2834	63801
Mumbai	2010-11	32990	0	6368	0	455	745	653	72	13375	54586
	2011-12	30611	0	4622	0	404	894	551	56	19104	56186
	2012-13	34751	0	4100	0	512	880	829	58	16900	58038
	2013-14	35980	0	4221	0	302	703	449	41	17529	59184
	2014-15(P)	38285	0	4304	0	448	0	544	45	20079	61680
Kandla	2010-11	48426	817	3082	410	6390	674	2586	160	16495	81880
	2011-12	49936	991	4064	101	9058	1291	2791	168	20207	82501
	2012-13	54544	925	4064	374	4624	3783	1935	116	23370	93619
	2013-14	52906	586	6080	270	3633	2732	453	29	20345	87005
	2014-15(P)	55589	1160	9725	242	4488	2223	0	0	18056	92483
All Ports	2010-11	179882	97686	46145	29001	20798	1915	114158	7561	96501	570886
	2011-12	173851	50719	51128	27648	20404	3279	120276	7651	102882	560187
	2012-13	180725	27289	58772	28032	14797	6597	119866	7714	106753	545831
	2013-14	181055	24616	71651	32620	13784	4796	114672	7453	112295	556480
	2014-15(P)	188743	16605	85287	32907	16224	3132	119441	7960	118990	581329

P : Provisional

Source: BPS and Major Ports and Indian Ports Association.

Commodity Composition of Traffic Handled at Non- Major Ports.

(000 Tons)

Maritime Status / UTs	Period	POL	Iron Ore	Building Material	Coal	Fertiliser & FRM	Others	Total
1	2	3	4	5	6	7	8	9
Gujarat	2010-11	140874	7156	8798	29731	6085	38263	230907
	2011-12	151487	6919	9022	38372	7135	46065	259050
	2012-13	165137	7636	8408	54337	6418	45881	287817
	2013-14	165578	5169	10002	65759	5950	57487	309945
	2014-15	153839	5630	10109	81118	7940	77457	336093
Maharashtra	2010-11	0	5120	2277	4997	228	2253	14875
	2011-12	0	6362	2490	7589	230	3276	19947
	2012-13	397	7818	2042	10396	84	3461	24198
	2013-14	1123	7615	1998	9715	140	4073	24664
	2014-15	0	9614	2120	10955	0	4606	27295
Andhra Pradesh	2010-11	2706	8957	484	19618	5799	5623	43267
	2011-12	3508	2974	859	23512	7035	7745	45633
	2012-13	1762	977	1111	30854	5135	11972	51811
	2013-14	1707	1475	1550	35957	5455	12548	58692
	2014-15	1411	10014	1285	49518	5341	15875	83444
Goa	2010-11	0	14581	0	0	0	0	14581
	2011-12	0	14305	0	165	0	0	14470
	2012-13	0	3276	0	113	0	0	3389
	2013-14	0	0	0	284	0	0	284
	2014-15	0	347	1	412	0	0	760
Tamil Nadu	2010-11	1503	0	7	0	58	43	1611
	2011-12	1114	0	7	0	46	43	1210
	2012-13	631	0	6	0	252	44	933
	2013-14	788	0	27	0	41	10	866
	2014-15	652	0	112	0	58	3	825
Karnataka	2010-11	31	2322	77	0	17	648	3095
	2011-12	0	0	19	0	29	544	592
	2012-13	38	0	0	5	52	515	610
	2013-14	38	0	0	6	75	390	509
	2014-15	40	0	86	0	47	478	651
Others states / Uts #	2010-11	184	130	684	4116	538	1370	7022
	2011-12	213	56	469	9402	1217	1486	12843
	2012-13	600	2148	386	13559	607	1865	19165
	2013-14	543	4079	601	14600	349	1838	22010
	2014-15	565	1465	722	16752	554	2069	22127
All Non Major PORTS	2010-11	145378	38266	12327	58462	12725	48200	315358
	2011-12	156322	30616	12866	79040	15742	59159	353745
	2012-13	168565	21855	11953	109264	12548	63738	387923
	2013-14	169777	18338	14178	126321	12010	75346	416970
	2014-15	156507	27070	14435	158755	13940	100488	471195
# : Includes Pondicherry, Orissa, Kerala, Andaman & Nicobar Islands and Lakshadweep Islands. No traffic was handled at ports, Daman & Diu.								

Annexure-IV

Commodity-Wise Capacity Available at Major Ports

(In Million Tonnes)

Commodities	KDS	HDC	PPT	VPT	EPL	CHPT	V O C	CoPT	MBPT	MoPT	NePT	KPT	JNPT	Total
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
POL														
As on 31.3.00	3.96	17.00	21.00	17.65	3.00	11.80	2.30	18.70	22.00	1.50	32.00	55.24	5.50	211.65
As on 31.3.10	3.96	17.00	21.00	17.65	3.00	11.80	2.30	18.70	22.00	1.50	32.00	55.24	5.50	210.24
As on 31.3.11	4.11	17.00	21.00	17.65	3.00	11.80	2.30	18.70	23.37	1.50	32.00	55.24	5.50	220.76
As on 31.3.12	4.50	17.00	21.00	17.65	3.00	15.27	2.30	19.01	23.37	1.50	32.00	55.24	5.50	228.70
As on 31.3.13	4.50	17.00	43.00	17.65	3.00	17.67	2.30	19.01	49.17	1.50	32.00	55.24	5.50	276.90
As on 31.3.14	4.50	17.00	43.00	25.65	3.00	17.67	2.30	24.01	49.17	1.50	32.00	55.24	5.50	291.90
As on 31.3.15	4.50	17.00	53.00	27.45	4.00	17.67	2.30	24.01	49.17	1.50	32.00	55.24	5.50	305.74
Iron Ore														
As on 31.3.00	-	6.00	4.50	12.50	-	8.00	-	-	7.50	24.30	-	-	-	62.80
As on 31.3.10	-	6.00	4.50	12.50	-	8.00	-	-	7.50	24.30	-	-	-	66.80
As on 31.3.11	-	6.00	4.50	12.50	8.00 ^a	8.00	-	-	7.50	33.00	-	-	-	79.50
As on 31.3.12	-	6.00	4.50	12.50	8.00	8.00	-	-	7.50	33.00	-	-	-	79.50
As on 31.3.13	-	6.00	4.50	12.50	8.00	8.00	-	-	7.50	27.50	-	-	-	72.00
As on 31.3.14	-	6.00	4.50	12.50	8.00	8.00	-	-	7.50	27.50	-	-	-	72.00
As on 31.3.15	-	6.00	4.50	12.50	8.00	8.00	-	-	7.50	27.50	-	-	-	72.00
Coal														
As on 31.3.00	-	7.00	20.00	-	13.00	-	6.25	-	-	-	-	-	-	46.25
As on 31.3.10	-	7.00	20.00	-	13.00	-	6.25	-	-	-	-	-	-	46.25
As on 31.3.11	-	7.00	20.00	-	21.00	-	6.25	-	-	-	-	-	-	54.25
As on 31.3.12	-	7.00	20.00	-	21.00	-	12.55	-	5.40	-	-	-	-	55.95
As on 31.3.13	-	7.00	20.00	-	21.00	-	12.55	-	5.40	-	-	-	-	55.95
As on 31.3.14	-	7.00	20.00	-	21.00	-	12.55	-	5.40	-	-	-	-	55.95
As on 31.3.15	-	7.00	21.00	-	24.00	-	12.55	-	5.40	4.61	-	-	-	74.56
Fertiliser														
As on 31.3.00	-	-	7.50	1.00	-	-	-	0.50	-	-	-	-	-	9.10
As on 31.3.10	-	-	7.50	1.00	-	-	-	0.50	-	-	-	-	-	9.10
As on 31.3.11	-	-	7.50	1.00	-	-	-	0.50	-	-	-	-	-	9.30
As on 31.3.12	-	-	7.50	1.00	-	-	-	0.50	-	-	-	-	-	9.30
As on 31.3.13	-	-	7.50	1.00	-	-	-	0.50	-	-	-	-	-	9.30
As on 31.3.14	-	-	7.50	1.00	-	-	-	0.50	-	-	-	2.00	-	11.30
As on 31.3.15	-	-	7.50	1.00	-	-	-	0.50	-	-	-	2.00	-	11.30
Break-Bulk Cargo														
As on 31.3.00	5.30	12.70	18.00	20.38	-	16.30	9.28	4.75	14.70	7.25	0.80	14.80	0.80	144.55
As on 31.3.10	6.44	12.70	23.50	20.38	-	17.92	10.17	6.75	14.70	7.25	0.80	14.97	0.90	164.49
As on 31.3.11	6.51	14.70	23.50	31.28	1.00	17.92	13.49	8.98	14.70	7.40	11.53	16.88	0.90	168.79
As on 31.3.12	6.79	14.75	27.30	32.50	1.00	17.92	13.49	9.55	14.70	7.40	11.53	17.42	0.90	175.20
As on 31.3.13	6.74	12.75	27.30	33.50	1.00	17.92	13.49	12.35	14.70	7.40	11.53	16.42	0.90	170.00
As on 31.3.14	6.74	15.75	33.30	47.05	1.00	17.92	22.21	12.35	15.70	7.55	11.53	28.52 ^a	0.90	219.16
As on 31.3.15	6.74	15.75	33.30	53.00	3.00	17.92	24.70	12.35	15.70	10.15	11.53	45.63	0.90	251.28
Container														
As on 31.3.00	5.50	4.00	-	1.70	-	19.15	5.00	4.31	-	-	1.90	7.20	51.66	100.42
As on 31.3.10	5.50	4.00	-	1.74	-	33.60	5.00	4.31	-	-	1.90	7.20	57.00 ^a	120.65
As on 31.3.11	5.73	4.00	-	2.50	-	42.00 ^a	5.00	12.50 ^a	-	-	1.00 ^a	7.20	57.00 ^a	137.53
As on 31.3.12	5.90	4.00	-	2.88	-	42.00	5.00	12.50	-	-	1.00	7.20	57.00 ^a	137.88
As on 31.3.13	5.90	4.00	-	2.88	-	42.00	5.00	12.50	-	-	1.00	7.20	56.45 ^a	136.75
As on 31.3.14	5.90	4.00	-	2.88	-	42.45	5.00	12.50	-	-	1.00	7.20	56.45 ^a	140.21
As on 31.3.15	5.88	4.00	-	2.88	-	42.45	5.00	12.50	-	-	1.00	7.20	71.97 ^a	166.68
TOTAL														
As on 31.3.00	15.76	48.70	71.00	62.23	16.00	55.75	22.81	28.37	44.20	33.05	44.70	77.24	57.96	574.77
As on 31.3.10	15.90	49.70	79.50	62.27	16.00	71.32	23.72	30.37	44.20	37.05	43.70	85.90	64.00	616.73
As on 31.3.11	16.35	50.70	79.50	64.93	31.00	79.72	27.04	40.95	45.57	41.90	44.53	80.91	64.00	670.13
As on 31.3.12	17.14	50.75	80.30	66.33	31.00	83.19	33.34	41.95	50.97	41.90	44.53	91.22	64.00	696.53
As on 31.3.13	17.14	49.75	102.30	67.33	31.00	85.59	33.34	44.95	75.77	35.40	44.53	93.22	65.55	744.91
As on 31.3.14	17.14	49.75	105.80	88.92	31.00	88.04	42.06	49.95	77.77	38.65	44.53	102.32	65.55	800.52
As on 31.3.15	21.10	49.75	119.80	90.75	32.00	88.04	44.55	49.95	77.77	43.70	44.53	121.43	75.57	871.52

Figure in the parenthesis indicate the number of berths. SJ-Barge jetties, T-Train jetties, A-Anchorage, SBM-Single Buooy Mooring

a) Capacity of JNP Container Terminal (3berths), NSCT (2berths), GT IPL (3berths) and shallow water berth (1 no) has been taken as 21.57 MT, 17.40 MT, 31.80 MT and 1.20 MT respectively. Capacity of one shallow water berth at JNPT is 0.90 MT for dry bulk cargo.

Capacity of Iron Ore berth has been taken as 8.0 MT at Ennore Port. After full fledged commissioning, balance capacity of 6.0 MT will be added.

Only BPS berth of Mumbai Port is considered as dedicated container berth. Assessed capacity of BPS (Dedicated) container berth of Mumbai Port is 1.0 MT. Berth No.5, 7& 8 are used as holding berths of MBPT cratts and no capacity has been accounted

^a After accounting the capacity due to productivity, addition of berth No. 13, 8, 15, MHC, Floating cranes

Source : Development Wing - Department of Shipping.