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UPDATE ON INDIAN PORT SECTOR
(UPTO 31.3.2008)

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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 biennial publication "*Update on Indian Port Sector*". Till now eleven issues of the publication have been released. The last issue contained data up to September, 2007.

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 covering 2006-07 and 2007-08. 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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I. RECENT TRENDS IN CARGO TRAFFIC AND POLICY INITIATIVES

1.1 International and Domestic Factors Related to Seaborne Trade

1.1.1 The global expansion is losing steam. As per the World Economic Outlook (IMF, April,2008) global growth is projected to slow to 3.7 per cent in 2008 from 4.9 per cent in 2007. The slow down is quite pronounced in the advanced economies from 2.7 per cent in 2007 to 1.3 percent in 2008. In contrast, developing economies are expected to grow at a slower but still robust 6.7 percent in 2008. The major drags on the global growth performance are the slowdown in the United States driven by the end of the housing bubble and the unfolding of credit crunch. Nonetheless, India and China are expected to grow at a brisk pace in 2008. India's resilience lies mainly in its healthy macro economic fundamentals and her increasing integration into the world economy. The exceptional growth performance of developing countries has led to amongst other things, continued strong demand for and higher prices for energy and primary commodities. On the trade side, the impact of spillovers from slowing activity in the advanced economies has been limited. The export (trade in goods) volume growth of advanced economies is expected to moderate from 5.3 % in 2007 to 4.8 % in 2008 and that of emerging and developing economies from 9.7 % to 7.0 % over the same period. Overall trading activity has been sustained, aided by strong growth in domestic demand in emerging economies. Growth in world sea-borne trade has not matched global trade volumes.

1.1.2 During the Tenth Plan (2002-07) India's Gross Domestic Product (GDP) grew at an annual average rate of 7.8% with GDP originating in industry growing at a higher rate of 9.2%. The robust growth performance of the Indian economy has helped to sustain a high growth in total seaborne cargo traffic which grew at an annual average rate of 11%. A noteworthy feature of India's growth in cargo traffic has been the fact that its growth has been much higher compared to their corresponding world averages and has outstripped both growth in world trade and output. To a large extent the strong growth of India's seaborne cargo traffic reflects strong growth in overall GDP and export volume in recent years. The momentum of growth in cargo traffic at Indian ports has been sustained with a growth of 11 per cent in the total volume of cargo handled in 2007-08 as well.

Table 1: Growth in Cargo handled at Indian Ports and related parameters (In per cent)							
Parameters	2002-03	2003-04	2004-05	2005-06	2006-07	Average 10th plan	2007-08
Trends in India's Select Macro Parameters							
I Total Cargo (MT) All Ports	10.1	9.6	12.5	10.9	11.4	11.0	11.0
(a) Major Ports	9.0	10.0	11.3	10.4	9.5	10.0	11.9
(b) Non Major Ports	17.4	8.5	18.2	12.6	15.5	12.8	8.4
II GDP overall	3.8	8.5	7.5	9.4	9.6	7.6	9.0
(a) Agriculture	-7.2	10.0	0.0	5.9	3.8	2.5	4.5
(b) Industry	7.1	7.4	10.3	10.2	11.0	9.2	8.5
(c) Services	7.5	8.5	9.1	10.2	11.1	8.9	10.8
III. Foreign Trade							
(a) Export in $ value	20.3	21.1	30.8	23.4	22.6	23.6	23.0
(b) Import in $ value	19.4	27.2	42.7	31.8	24.4	29.5	27.0
Trends in Select Global Indicators							
IV. World Output	2.9	3.8	4.9	4.4	5.0	4.1	4.9
(a) Advanced economies	1.6	1.9	3.2	2.6	3.0	2.5	2.7
(b) Developing economies	4.7	6.2	7.5	7.1	7.8	6.7	7.9
V Export Volume (Goods)							
(a) Advanced economies	2.3	3.5	5.7	5.5	8.6	5.6	5.3
(b) Developing economies	6.9	11.4	14.0	10.4	10.5	10.6	8.7
VI Import Volume (Goods)							
(a) Advanced economies	3.0	5.5	8.5	6.2	7.0	6.3	3.8
(b) Developing economies	8.2	11.4	16.6	12.4	12.5	11.9	12.3
VII. World Seaborne Trade*	1.2	5.7	4.8	3.8	4.5	4.0	
(a) Goods Loaded	1.6	6.2	5.3	3.7	4.2	4.2	
(b) Goods Unloaded	1.5	5.7	4.9	3.6	4.3	4.0	

II Based on gross domestic product (GDP) at Factor Cost (1999-2000 Prices), Central Statistical Organization
III. Based on Department of Commerce, DGCI&S data
IV, V&VI Based on World Economic Outlook, April, 2008- IMF
VII Based on Review of Maritime Transport 2007, UNCTAD
Note: MT: Million Tonnes. For item nos. IV, V, VI &VII year 2002-03 refers to calendar year 2002 and so on.
*: growth in total goods loaded plus unloaded

World Seaborne Trade

1.1.2 In 2006 seaborne trade accounted for 89.6 per cent of global trade in terms of volume (tons) and 70.1 per cent in terms of value (in United States Dollars). During the same year, airborne cargo had a share of just 0.27 per cent of trade volume and 14.1 per cent of trade value, whilst overland and other modes (including pipelines) accounted for the remaining 10.2 per cent of trade volume and 15.8 per cent of trade value. Total world seaborne trade including Intra-European Union trade, amounted to about 7.4 billion tons in 2006 (UNCTAD Review of Maritime Transport, 2007).

Model split of international trade in goods, $ Billion (excluding intra-European Union trade)							
Mode	2000	2001	2002	2003	2004	2005	2006
Airborne	809 (17.23)	728 (16.35)	698 (15.42)	770 (14.91)	913 (14.09)	1040 (13.94)	1198 (14.09)
Seaborne	3029 (64.48)	2877 (64.62)	2955 (65.26)	3478 (67.34)	4440 (68.85)	5207 (69.77)	5958 (70.07)
Overland & other	859 (18.29)	847 (18.03)	875 (19.32)	917 (17.75)	1102 (17.06)	1216 (16.29)	1347 (15.84)

Model split of international trade in goods, million metric tons (excluding intra-European Union Trade)							
Mode	2000	2001	2002	2003	2004	2005	2006
Airborne	14 (0.28)	14 (0.28)	14 (0.26)	14 (0.28)	16 (0.25)	17 (0.25)	19 (0.27)
Seaborne	4948 (89.08)	4784 (89.82)	4787 (89.18)	4881 (89.04)	5769 (89.90)	6045 (88.08)	6319 (89.57)
Overland & other	590 (10.55)	528 (9.91)	567 (10.56)	599 (10.71)	631 (9.85)	665 (8.69)	717 (10.16)
Note: Figures in parenthesis indicate percent share of respective modes in total international cargo							

1.1.4 Comparing data since 2000, the shares of the different modes have remained quite stable in terms of volume, whilst fluctuating much more when analyzing the trade value. During the last seven years, the share of seaborne trade volume has fluctuated only between 89.04 and 89.82 per cent (a range of 0.78 per cent whilst its share in trade value fluctuated seven times more – between 64.48 and 70.07 per cent (a range of 5.59 per cent). During the same period, the airborne share fluctuated by only 0.02 per cent in terms of volume and by 3.29 per cent in terms of value.

1.1.5 The main reason for those differences lies in the fact that the share in trade value is strongly influenced by the prices of the traded commodities. In particular, the rising price of oil, but also that of other commodities, has contributed to the rise in the share of seaborne trade – albeit only its value and not its volume. Another trend that leads to an increase in the share of maritime trade value is the changing composition of global maritime trade, which includes increasingly manufactured and intermediate goods.

1.1.6 Between 2000 and 2006 the volume of airborne trade has grown by 22.7 per cent, seaborne trade by 30.4 per cent, and the trade moved by other modes by 23.7 per cent.

Average value per ton of cargo across Modes in International trade							
Average value per ton of cargo ($)	2000	2001	2002	2003	2004	2005	2006
Airborne	56,824	51,741	50,446	54,416	66,602	59,710	63,184
Seaborne	626	604	617	696	772	881	943
Overland and other	1437	1505	1542	1631	1748	1827	1878
All modes	[illegible]	836	843	923	1008	1109	1205

1.1.7 In 2006, the average value per ton of cargo of seaborne trade was $943 versus $63 184 per ton of airborne trade and $1,878 per ton of trade transported overland or by other modes such as pipelines. In other words, in 2006 airborne cargo was on average 67 times more valuable (per ton) than seaborne cargo. This proportion has been declining over recent years; in 2000, airborne trade was 91 times more valuable per ton of cargo than seaborne trade.

(Section on World seaborne Trade (paragraph Nos 1.1.3 to 1.1.6) is based on UNCTAD Transport Newsletter No. 38, 4th Quarter, 2007/1st Quarter, 2008)

1.2 Cargo Traffic at Indian Ports

1.2.1 During 2007-08 major and non-major ports in India accomplished a total cargo throughput of about 716 million tonnes reflecting an increase of 11 % over the previous year. This sustained increase during 2007-08 comes on top of 11.4 % growth in cargo traffic at Indian ports in 2006-07 (Table: 2). However, the year 2007-08 saw a moderation in the growth of cargo handled at non-major ports to 8.4 % from 16.5 % in 2006-07. Over the same period growth in cargo handled at major ports accelerated to 11.9 % from 9.5 %.

Table 2: Traffic Handled at Indian Ports (Thousand Tonnes)								
Major/Non-Major Ports	Traffic Handled				Growth over previous year/period			
	2004-05	2005-06	2006-07	2007-08(P)	2004-05	2005-06	2006-07	2007-08(P)
Major Ports	383756 (73.55)	423580 (73.18)	463839 (71.94)	519240 (72.56)	11.3	10.4	9.5	11.9
Non Major Ports	138233 (26.45)	155420 (25.54)	181112 (28.06)	196375 (27.44)	16.2	12.6	16.6	8.4
All Ports	521256 (100.00)	578982 (100.00)	644867 (100.00)	715615 (100.00)	12.8	10.9	11.4	11.0
(P): Provisional; Figures within parenthesis indicate percent share in total cargo traffic for Major and Non-Major ports respectively.								

1.3 Cargo Traffic at Major Ports

1.3.1 In terms of port performance, the analysis of cargo handled at 12 major ports reveals that 11.9% growth in cargo traffic in 2007-08 was sustained by double digit growth at JNPT port which posted an increase of 24.6%, followed by Kandla (22.6%), Tuticorin (19.3%), Visakhapatnam (14.6%), New Mangalore (12.4%), Paradip (10.2%) and Mumbai (8.9%) (Table 3). About more than half (60%) of the total increase in cargo traffic at major ports during 2007-08 is attributed to a cluster of 3 ports on the West Coast namely Mumbai, JNPT and Kandla. In contrast, the 6 major ports on the East Coast (Kolkata Vizag, Paradip, Tuticorin, Chennai and Ennore) accounted for little above 40% increase in total cargo at major ports in 2007-08. The cargo traffic attained by the 12 major ports at 519.24 million tonnes in 2007-08 surpassed the target of 515.31 million tonnes by 0.8%. However, only 6 major ports could exceed their respective targets of cargo traffic during 2007-08. These include JNPT (13.1%), Kandla (8.2%), Tuticorin (5.4%), New Mangalore (4.8%), Chennai (2.3%) and Visakhapatnam (0.6%). Port-wise traffic handled during 2007-08 as compared with their respective targets in 2007-08 is given in Table 3.

Table 3 : Traffic Handled at Major Ports (Thousand Tons)

Ports	Annual Average growth in 10th Plan (in per cent)	2006-07	2007-08		% Change		
			Actual (Prov)	Target	In 2006-07 over 2005-06	2007-08 Over 2006-07	2007-08 Over Target
Kolkata	12.7	55050	57202	59002	3.8	4.1	-2.7
Kolkata DS	15.9	12586	13741	13141	18.6	9.1	4.6
Haldia DC	11.3	42464	43541	45741	6.3	2.6	-4.8
Paradip	12.8	38517	42435	45886	18.3	10.2	-7.5
Visakhapatnam	5.0	56385	64597	64242	[illegible]	14.6	0.6
Ennore	34.8	10714	11563	11700	16.9	7.9	-1.2
Chennai	8.5	53414	57154	55890	13.1	7.0	2.3
Tuticorin	6.8	18001	21480	20385	6.0	19.3	5.4
Cochin	5.0	15314	15813	16936	10.3	3.2	-5.6
New Mangalore	13.7	32042	36019	34342	7.0	12.4	4.8
Mormugao	2.5	34241	35125	35196	8.1	2.6	-0.2
Mumbai	14.8	52364	57039	58788	10.5	8.9	-2.6
JNPT	14.9	44815	55836	49375	18.4	24.6	13.1
Kandla	7.2	52982	64883	60036	15.4	22.6	8.2
All Ports	10.0	463839	519240	515346	9.5	11.9	0.8

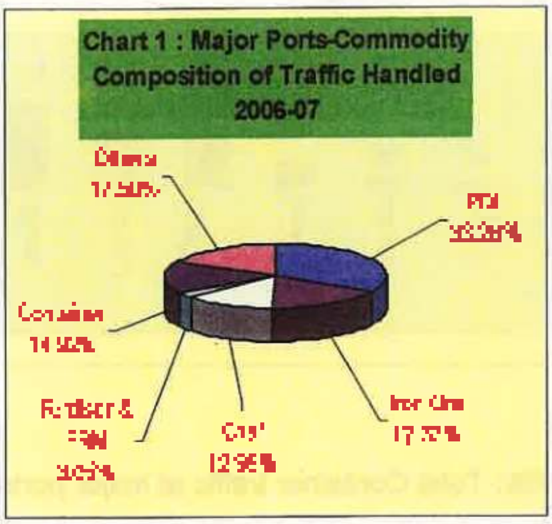
1.4 Commodity wise Cargo Traffic at Major Ports

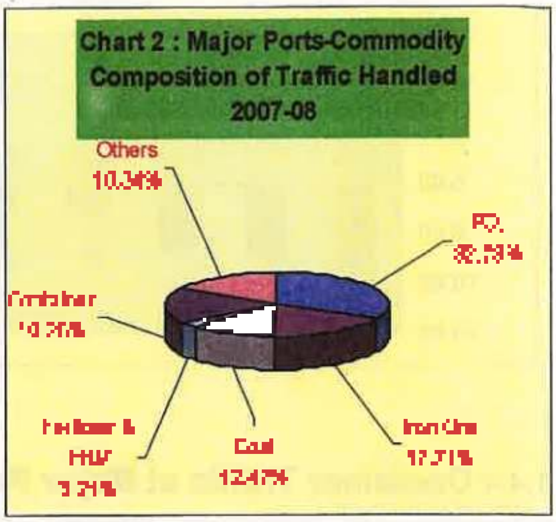
1.4.1 In terms of Commodity-wise traffic at 12 major ports, the overall growth of 11.9% in 2007-08 was contributed by an increase of 25.4% in container traffic followed by fertilizer (18.0%), Iron Ore (14.2) and POL (9.5%) [Table 4]. However, POL and container traffic were the 2 main broad categories which accounted for close to 60% of the increase in total cargo traffic at major ports. As regards, growth with respect to target all commodity groups except coal and fertilizer (dry) & others fell short of the targets set for 2007-08.

Table 4 : Commodity-wise Traffic Handled at Major Ports (000 Tons)							
Commodity	Average annual Growth (%) in Tenth Plan	2006-07	2007-08		In 2006-07 over 2005-06	% Change 2007-08	
			Actual(P)	Target		Over 2006-07	Over Target
POL	8.4	154283	168827	173806	8.8	9.5	2.8
Iron Ore	12.4	80582	91874	85800	[illegible]	14.2	7.4
Fertilizer	0.5	14124	16384	15746	16.2	18.0	5.0
Finished	21.6	7828	10472	8806	19.7	33.8	26.5
Raw (Dry)	1.6	8154	6062	6940	11.0	2.4	-12.0
Coal	3.7	80217	84725	74543	12.6	7.5	-13.2
Thermal	3.4	37310	38860	48722	-0.8	5.1	-18.8
Other Coal*	4.9	22907	25145	25611	28.8	9.8	-2.6
Container	14.6	73485	92134	78670	16.5	25.4	18.8
Others	16.8	81149	84846	89589	37.0	4.6	-2.0
Total	10.6	**463839**	518240	515106	9.5	11.9	0.6

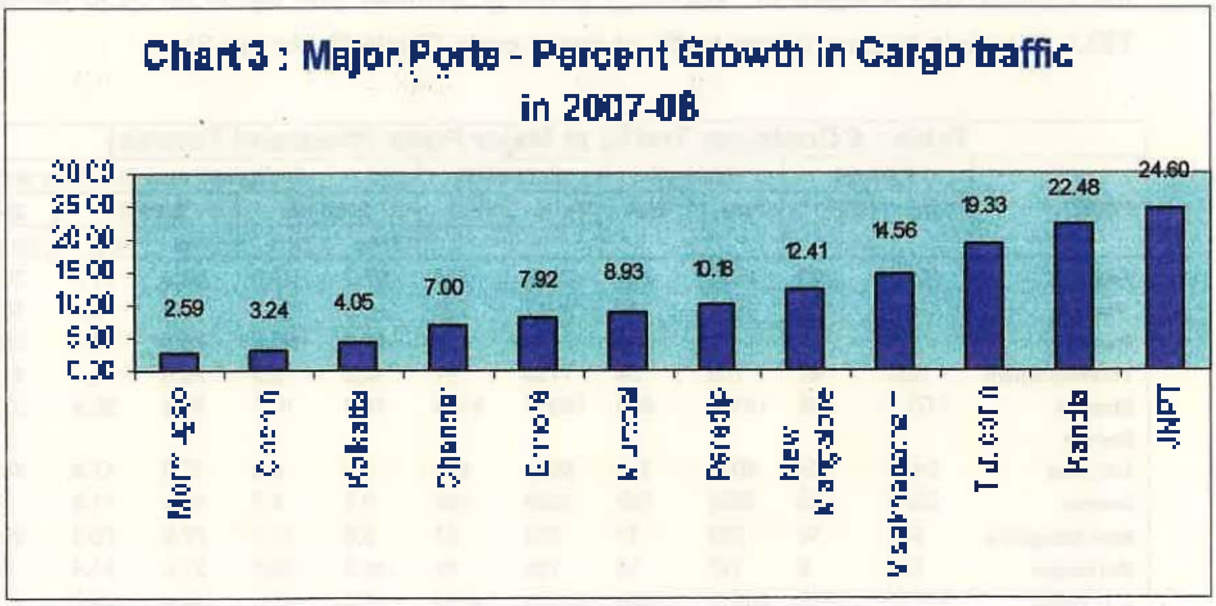
* Only Coking Coal. Steam/Industrial Coal, Coke etc. included in 'Others'. (P) : Provisional;

1.4.2 The shares of different commodities in total cargo traffic are depicted in the Charts 1 and 2 for the years 2006-07 and 2007-08 respectively. Energy imports constituting POL and coal constitute about 49 per cent of the total cargo traffic at India's major ports.





1.4.3 The Port-wise & commodity-wise traffic handled at major ports during the last few years are given in Annex 3. The percent growth in cargo traffic in 2007-08 with respect to 2006-07 and targets in 2007-08 is shown in Charts 3 and 4 respectively.



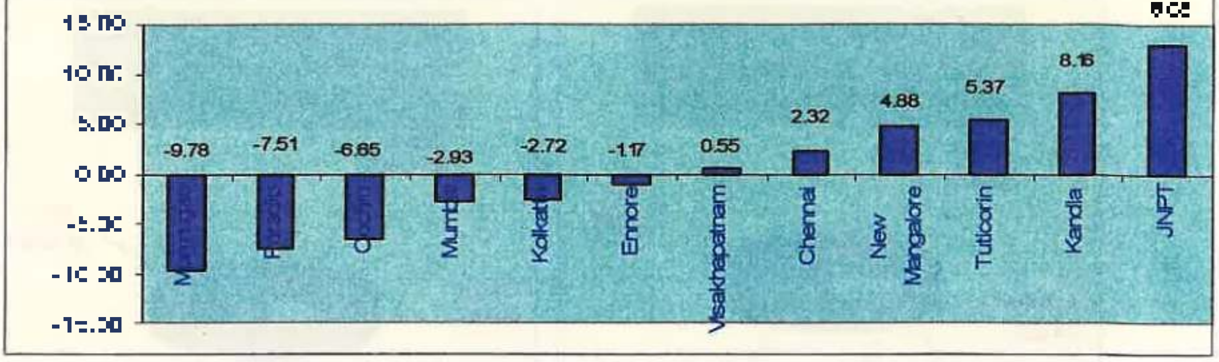


Chart 4 : Major Ports - Percent Growth in Cargo traffic in 2007-08 wrt to Target

1.4.4 **Container Traffic at Major Ports:** Total Container traffic at major ports has increased both in terms of tonnes (25.4%) and twenty foot equivalent units [TEUs] (21.1%) during 2007-08. Growth in the container traffic (in terms of tonnes) at 25.4 has been more than double the overall cargo growth (11.9%) at major ports during 2007-08. However, amongst the major ports, the port at Mumbai witnessed fall in container traffic. Jawahar Lal Nehru Port continues to be the leading container handling port in the country with a share of 56.4% in terms of tonnage and about 60 % in terms of TEUs in India's total container traffic at major ports (Table:5) (Annex 3).

Table : 5 Container Traffic at Major Ports (thousand Tonnes)

PORT	2005-06		2006-07		2007-08(P)		% Change over previous year					
	Tons	TEU	Tons	TEU	Tons	TEU	2005-06		2006-07		2007-08(P)	
							Tons	TEU	Tons	TEU	Tons	TEU
Kolkata	3254	203	4059	239	5178	297	37.2	27.7	23.0	17.7	20.4	24.3
Haldia	1910	104	1918	110	2242	128	5.9	14.7	0.4	0.0	18.0	18.4
Paradip	45	3	32	2	54	4	45.2	50.0	-28.9	-33.3	68.8	100.0
Visakhapatnam	621	47	780	55	1130	71	-3.0	2.2	25.6	16.[illegible]	41.8	23.5
Chennai	11757	735	14155	885	18040	1128	13.2	19.1	20.5	20.5	27.4	27.5
Ennore												
Tuticorin	3475	321	4111	377	5300	450	7.2	4.0	17.0	17.4	40.[illegible]	19.4
Cochin	2632	203	3035	227	3290	254	3.3	9.7	15.4	11.2	7.8	11.9
New Mangalore	142	10	255	17	318	21	3.2	11.1	77.3	70.0	20.4	23.5
Mormugao	105	9	127	13	135	14	-24.5	-10.0	21.0	44.4	6.3	7.7
J.L. Nehru	33777	2567	40811	3297	51920	4060	17.5	12.0	20.8	28.7	27.2	23.1
Mumbai	2145	160	1559	183	1582	118	-19.6	-28.8	-29.3	-11.5	3.3	-14.5
Kandla	2311	149	2776	175	7584	137	[illegible]	[illegible]	20.2	16.5	5.0	[illegible]
All Ports	62021	4319	73435	5042	92134	6712	13.3	8.9	15.5	20.1	25.4	21.1

(P) : Provisional

Table : 6 . Worlds Top Container Ports 2007						
Ranking				TEU(in million)		
2006	2007	Port	Country	2006	2007	% Change
1	1	Singapore	Singapore	24.8	27.9	12.6
3	2	Shanghai	China	21.7	26.15	20.5
2	3	Hong Kong	China	23.28	23.5	1.6
4	4	Shenzhen	China	18.6	21.1	14.1
5	5	Busan	South Korea	12.03	13.27	10.3
7	6	Rotterdam	Netherlands	9.7	10.5	11.3
8	7	Dubai	UAE	8.92	10.7	20.0
6	8	Kaohsiung	Taiwan	9.77	10.26	5.0
9	9	Hamburg	German	8.9	9.9	11.2
11	10	Qingdao	China	7.7	9.46	22.9
13	11	Ningbo	China	7.07	9.36	32.4
15	12	Guangzhou	China	6.63	9.3	40.3
10	13	Los Angeles	US	8.47	8.36	1.3
14	14	Antwerp	Belgium	7.0	8.2	14.3
12	15	Long Beach	US	7.29	7.31	0.3
16	16	Port Klang	Malaysia	6.32	7.12	12.7
17	17	Tianjin	China	5.95	7.1	19.3
15	18	Tanjung Pelepas	Malaysia	4.77	5.5	15.3
18	19	New York	US	5.1	5.3	3.9
20	20	Bremerhaven	Germany	4.4	4.9	11.4

Source : The Indian Maritime Transport Economist – Volume 5 – April 2008

1.5 Non- Major Ports

1.5.1 During the Tenth Five Year Plan the annual average growth rate of traffic at non-major ports was 12.8%. However, cargo traffic at non-major ports showed a moderation in growth to 8.4% in 2007-08 from 16.5% in 2006-07. Non-Major Ports handled around 27 % of the total maritime freight traffic of the country during 2007-08.

1.5.2 Table 7 provides traffic handled by non-major ports in terms of maritime states (geographic location) during the last few years. Non-major Ports accounted for more than a quarter (27 %) of the total cargo handled at the Indian Ports. It is noteworthy, Gujarat accounted for three fourth of the total traffic handled by the non-major ports in the country followed by Andhra Pradesh around 13%, Goa 7% and Maharashtra about 6%. These four maritime states together accounted for close to 97% of the total cargo traffic handled by the non-major ports in India during 2007-08. The growing importance of non-major ports in handling cargo traffic has helped alleviate the congestion at major ports. Table 8 gives a glimpse of commodity profile of the cargo handled at non major ports in the country.

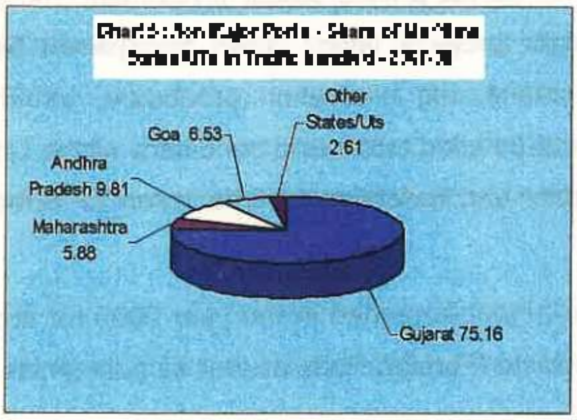
Table 7 : Traffic Handled by Non-Major Ports by Maritime States/Uts								
Maritime State/UT	Traffic Handled (000 Tonnes)				% Change over Previous Year			
	2004-05	2005-06	2006-07	2007-08	2004-05	2005-06	2006-07	2007-08
Gujarat	97128 (70.28)	108379 (69.54)	133442 (73.13)	147590 (75.18)	11.7	11.3	22.6	11.4
Maharashtra	12143 (8.78)	11158 (7.18)	11308 (6.02)	11588 (5.88)	17.5	-8.1	1.4	-7.1
Andhra Pradesh	15007 (10.86)	18427 (11.86)	19590 (10.77)	19258 (9.81)	50.4	22.8	6.9	3.6
Goa	8467 (6.12)	11702 (7.53)	14258 (7.80)	12226 (6.08)	-2.5	38.1	21.8	-13.4
Tamil Nadu	854 (0.52)	711 (0.46)	643 (0.35)	898 (0.46)	23.2	-16.7	-9.6	38.8
Karnataka	3578 (2.59)	4117 (2.65)	2230 (1.22)	2312 (1.18)	302.7	17.4	-46.1	13.2
Other States/Uts	1048 (0.76)	1172 (0.75)	1094 (0.60)	1732 (0.88)	16.8	11.8	-6.7	67.4
All the States/Uts	138203 (100)	155420 (100)	181112 (100)	196373 (100)	15.2	12.5	16.5	8.4
Note: Figure in parenthesis indicate the percentage share of maritime state/UT to total cargo traffic handled at Non-Major ports .								

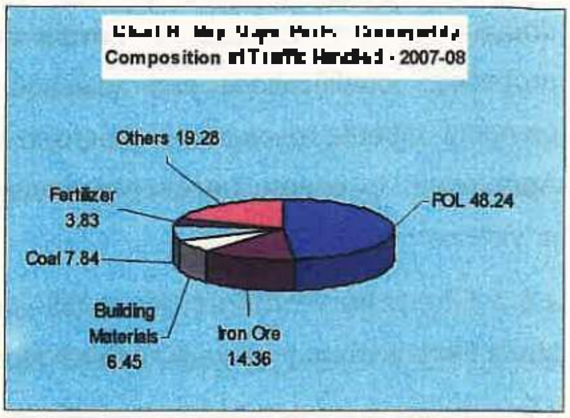
1.5.3 Four commodities, viz. POL, iron ore, building materials and coal accounted for more than three-fourth (77%) of the total cargo handled at the non major ports in 2007-08 (Table :8)

Table 8 : Commodity-wise Traffic Handled by Non-Major Ports								
Commodity Group	Traffic Handled (000 Tonnes)				% Change over Previous Period			
	2004-05	2005-06	2006-07	2007-08	2004-05	2005-06	2006-07	2007-08
POL	67758 (49.03)	69774 (44.89)	81670 (45.09)	94729 (48.24)	12.2	2.9	17.4	15.7
Iron Ore	21298 (15.48)	28840 (18.56)	29217 (16.13)	28952 (14.75)	29.4	34.8	1.3	-1.2
Building Materials	14122 (10.22)	13844 (8.92)	13590 (7.50)	12664 (6.45)	6.6	0.2	1.5	-6.2
Coal	13516 (9.78)	13558 (8.73)	14048 (7.76)	15387 (7.84)	87.2	0.4	3.6	9.6
Fertilizer	3059 (2.22)	5814 (3.51)	7048 (3.89)	7570 (3.85)	10.8	42.6	25.5	6.7
Others	17482 (12.65)	24252 (15.32)	35344 (19.51)	37588 (19.22)	9.1	38.8	45.6	7.1
All	138203 (100.00)	155420 (100.00)	181112 (100.00)	196375 (100.00)	15.2	12.5	16.5	8.4
Note: Figure in parenthesis indicate the percentage share of commodity to total cargo handled of all commodities								

1.5.4 The share of Maritime States/UTs in the total traffic and Commodity-wise composition of traffic handled at non major ports during 2007-08 is revealed in the pie

Charts 5 and 6 respectively. Commodity-wise traffic handled at non-major ports for maritime states for the last few years is given in Annex 4.





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

1.5.5 Table : 9 provides an estimate of cargo handling capacity at the end of Tenth Plan (end March 2007) and likely capacity at the end of Eleventh Plan (end March, 2012). The share of Gujarat in the cargo handling capacity at non major ports is expected to decline from close to four-fifth as of now to about two-fifth at the end of Eleventh Plan due to proposed capacity expansion in non major ports in other major maritime states.

Table:9-Non-major Ports in Maritime States: Capacity Addition during 11th Plan		
Commodity	Capacity as on (million tones per annum)	
	March 31,2007	March 31,2012 (likely)
1.Andhra Pradesh	18.50 (8.10)	102.20 (17.82)
2.Gujarat	192.00 (79.72)	238.22(41.54)
3.Maharashtra	11.37 (4.86)	96.29 (16.79)
4.Tamil Nadu	0.85 (0.37)	29.65 (5.17)
5. Karnataka	4.00 (1.75)	30.00 (5.23)
6. Orissa	0.00 (0.0)	13.20 (2.30)
7.Goa	11.76 (5.15)	15.78 (2.75)
8.Kerala	0.14 (0.06)	27.95 (4.87)
9.West Bengal	0.00 (0.0)	7.80 (1.36)
10.Puducherry	0.00 (0.0)	12.14 (2.12)
11.Total	228.31	573.50
Note: Figures in parenthesis reflect share of maritime States in total non major port capacity		

1.6 Policy Initiatives-Central Government

1.6.1 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.

1.6.2 Government also issued guidelines on joint venture formation in Major Ports which came into effect from 1.6.2000. 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.

1.6.3 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.

1.6.4 Given the vital role of maritime infrastructure in economic development and trade, it has been felt that policy for maritime sector concerning Ports, Shipping and Inland Water Transport needs to be in position. Accordingly the Department of Shipping had brought out a *Draft Policy for Maritime Sector* (which could be accessed at the Department's website http://shipping.nic.in). Suggestions/views were invited from all those connected with the maritime sector. Based on this feed back from the various stake-holders, the policy is in the process of finalisation. Box 1 gives a snapshot of major achievements related to the Port Sector during 2007-09.

1.7 Eleventh Plan (2007-12)

1.7.1 The Approach Paper to the Eleventh Five Year Plan (2007-2012): 'Towards Faster and More Inclusive Growth (November, 2006)' by the Planning Commission has proposed an annual average growth target of 9% in terms of GDP for the Eleventh Plan and laid emphasis on following aspects for the Port Sector:

(a) To develop ports and related infrastructure to bring them to international standards in turn around time and clearing of import & export cargoes;

(b) Substantial capacity augmentation at major and minor ports;

(c) A deep sea port to be developed and drafts of existing ports be deepened, where feasible, through capital dredging;

(d) Bulk of capacity augmentation would be undertaken through public private partnership and captive users, and

(e) Rail road connectivity of ports with the hinterlands to be improved on priority basis.

Box 1 –Port Sector Major Achievements: 2007-08

Major Berth Development Projects completed

- Berth No. 2, Haldia Dock Complex 2 million tonne per annum (MTPA) capacity at an estimated cost of Rs. 47 Crore;
- Berth No.13 at Haldia Dock Complex 1 MTPA capacity at an estimated cost of Rs. 40 crore;
- Crude oil Single Point Mooring (SPM) -KRL, Cochin Port Trust (6 MTPA capacity at an estimated cost of Rs. 720 crore.

Major Berth Development Projects Approved/Awarded/Work in Progress

- Marine Liquid Terminal I, Ennore Port Ltd (EPL) at an estimated cost of Rs. 200 Crore
- Iron Ore Terminal at EPL at an estimated cost of Rs. 500 crore
- Coal Terminal at EPL at an estimated cost of Rs. 360 cr
- Second Container Terminal, at Chennai Port Trust at an estimated cost of Rs. 495 Crore
- International Trans-shipment Container Terminal at Vallarpadam, Cochin Port Trust at an estimated cost of Rs 2118 Crore
- Off-shore Container Terminal at Mumbai Port Trust at an estimated cost of Rs. 1229 Crore
- Development of Harbour Wall Berths at Mumbai Port Trust at an estimated cost Rs. 353 Crore
- Second Chemical Jetty at Mumbai Port Trust at an estimated cost of Rs. 119 Crore;
- Outer Harbour Expansion Project & Upgradation of Iron Ore Handling Facilities at Visakhapatnam Port at an estimated cost of Rs. 185.15 cr

Capital Dredging Projects

- FIB Approval obtained for Deepening of Channel and Inner Harbour at Tuticorin Port Trust at an estimated cost of Rs. 539 crore.
- Commencement of Capital Dredging, Phase I, EPL at an estimated cost of 91 crore;

II. Policy and Performance of Maritime States

2.1 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). The country's coastline of 7517 kms spread over 13 States/UTs is studded with 12 Major Ports and 187 Non-Major Ports. Of the Non-Major Ports, around 60 are handling traffic. Chart-7 gives the geographical location of the Major and prime Non-Major Ports.

Chart - 7

[illegible]

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)

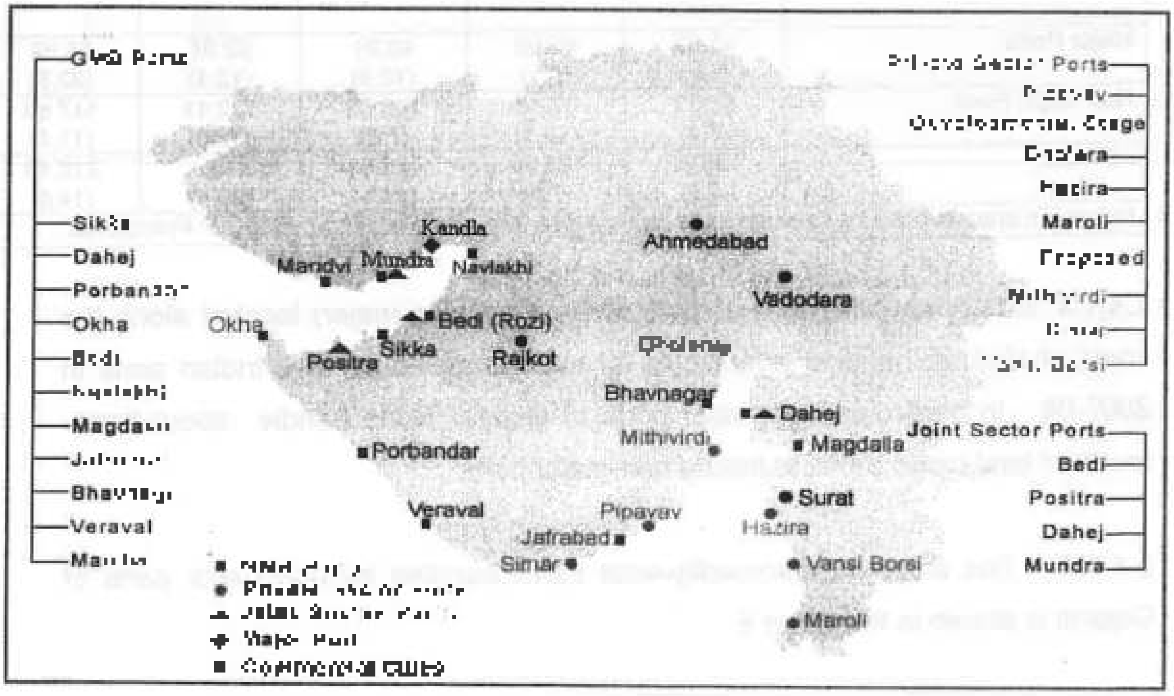
2.3.1 With a view to have an integrated approach for the development of both Major and Non-Major Ports, the **Maritime States Development Council** (MSDC) was constituted in May, 1997 under the Chairmanship of the Honourable Minister of Shipping. The Ministers in-charge of Ports in all Maritime States, UTs of Pondicherry, A&N Administration, Daman & Diu and Lakshadweep are its members. So far nine meetings of MSDC have been held.

2.3.2 The deliberations and decisions of the MSDC provide the institutional framework for coordinated development of Major and Non-Major ports.

2.4 Port Policy in Maritime States

2.4.1 GUJARAT The state of Gujarat is endowed with 1214 km length of coastline which constitutes about 1/6th of the total Indian coastline. Out of 41 ports located along its coast 40 are non-major ports while one port viz. Kandla is a major port. During 2006-07 only 15 non major ports in the state handled cargo. A snap view of the location of important ports in Gujarat is given in Chart –5.

Chart - 8 : Gujarat: Major and Minor Ports



2.4.1.1 The Government of Gujarat announced its integrated Port Policy in December, 1995. The main objectives of this policy are, inter-alia, increasing Gujarat's share in the export and import sector in national and international trade and commerce in pursuance of liberalization and globalisation policy; catering to the needs of increasing traffic emanating from the western and northern states and offering port facilities to promote export oriented industries and port based industries. In addition the policy aims at encouraging ship-building, ship-repairing and also manufacturing facilities for cranes, dredgers and other floating crafts. Besides providing facilities for coastal shipping of passenger and cargo traffic the policy aims to attract private sector investment in the existing minor and intermediate ports and at new port locations.

2.4.1.2 The trends in the cargo handled at both major and non-major ports of Gujarat State during the last few years are given in Table 10. The overall growth in cargo traffic in case of Gujarat at 14.6% in 2007-08 was less than the growth (20.4%) achieved in 2006-07.

Table : 10- Gujarat: Trends in Cargo Handled at Major & Non-Major Ports (Million Tonnes)

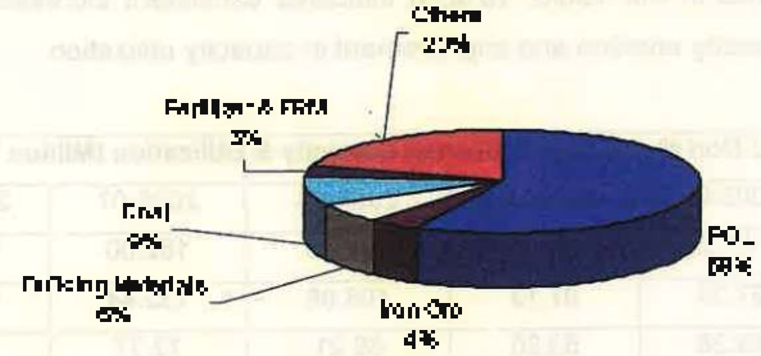
Major/Non-Major	2003-04	2004-05	2005-06	2006-07	2007-08(P)
Major Ports	41.52 (2.2)	41.56 (6.1)	45.81 (10.5)	52.98 (15.4)	64.89 (22.5)
Non-Major Ports	87.29 (7.1)	97.13 ([illegible])	108.32 (7.3)	132.44 (19.2)	147.60 (11.4)
All Ports	124.85 (5.6)	135.68 ([illegible])	153.94 (11.0)	185.42 (20.4)	212.49 (14.6)

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 about 30% of total cargo handled at Indian ports in 2007-08. In particular, non-major ports of Gujarat alone handle about three-fourth of total cargo traffic at India's non-major ports.

2.4.1.4 The share of commodity-wise traffic handled by non major ports of Gujarat is shown in the Chart 9.

Chart 8 : Commodity Composition of Traffic Handled at Non-Major Ports of Gujarat - 2007-08



2.4.1.5 Amongst the Maritime States of India, Gujarat is one of the States, which has played a very proactive role in the development of minor ports on its coastline. It announced an integrated Port Policy in December 1995 (Box 2).

Box: 2-Gujarat: Objectives of Integrated Port Policy

- To increase Gujarat's share in the export and import sectors in national and international trade and commerce in pursuance of the policy of liberalisation and globalization.
- To reduce the burden on existing major ports on the western coast of India.
- To provide port facilities to promote export oriented and port based industries which are estimated to contribute 50% of the total industrial investment in Gujarat.
- To take full advantage of the strategic location of Gujarat coast by (a) encouraging shipbuilding, ship repairing and related manufacturing activities and; (b) providing facilities for coastal shipping and ferrying passengers between Saurashtra and South Gujarat and other destinations.
- To meet Gujarat's potential power requirements by (a) establishing barge mounted power plants and (b) providing exclusive port facilities for importing different kinds of power fuel.
- To attract private investment for the development of minor ports BOOT framework has been envisaged to provide – (i) timeliness of infrastructure creation, (ii) efficiency of operation and operational autonomy to the private sector, (iii) synchronization with hinterland development, (iv) Government's role to be maintained only in appropriate areas, and (v) Government financial liabilities to be kept to a minimum.

2.4.1.6 Recent trends in cargo handled and capacity creation in non-major ports of Gujarat are captured in the Table: 10 a. It indicates consistent increase in cargo throughput, capacity addition and improvement in capacity utilization.

Table : 10 a- Gujarat: Non Major Ports - Current Capacity & Utilization (Million Tonnes)					
Item	2003-04	2004-05	2005-06	2006-07	2007-08
Capacity*	147.33	152.23	163.23	182.00	197.00
Cargo Handled	87.33	97.19	108.08	132.44	147.60
% Utilization	59.28	63.86	66.21	72.77	74.92
* Including Lighterage Port Capacity					

2.4.1.7 As per the port policy Gujarat Maritime Board (GMB) has selected 10 Green Field sites for development of new ports as "All weather Deep Water Direct Berthing Ports". Amongst 10 ports, 6 ports are to be developed through private investment and remaining 4 ports in the joint sector. The GMB has identified some major projects for capacity augmentation for the Eleventh Plan period (2007-12). The list of projects indicated by the GMB for capacity augmentation is given in the Table 11.

Table : 11 Proposed Capacity Augmentation during Eleventh Plan (Million Tonnes)		
Year	Cumulative Capacity	Major Projects
2006-07	163	10 Essar Bulk Terminal, 8 Mundra Bulk & Container Terminal
2007-08	182	5 Petronet LNG Terminal, 3 Pipavav Container Terminal
2008-09	197	5 Dahej Bulk Terminal, 2 GMB Private Jetties
2009-10	220	20 Reliance Sikka SBM, 3 Gujarat Ambuja Bulk Terminal
2010-11	230	3 Gujarat Sidhi Bulk Terminal, 5 Hazira Shell Bulk Terminal
2011-12	239	10 Green Field Port –Maroil
Source : Gujarat maritime Board		

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 Port and 53 non-major ports. Out of 53 non-major ports only 11 handle cargo. Maharashtra Maritime Board (MMB) was established in 1996 and is the nodal agency for regulation and development of the State's maritime activities. MMB has taken many policy initiatives for development of port sector in the State. Main initiatives are listed in Box 3

Box: 3-Maharashtra: Policy Initiatives for Port Development

- Development on BOOST basis
- Developers selection on MOU basis or by tender if many investors interested.
- Concession period of 50 years
- Concessional Wharfage
- Government land on lease, if available, at market valuation
- Equity participation by Government/MMB up to a maximum of 11 %
- Road linkage to nearest State Highway to be part funded by the State
- Rail connectivity by Developer
- Freedom to fix tariff

Policy Guidelines for Captive Terminals

- Land and site for jetty will be leased out for a period of 30 years
- Development on Build Operate & transfer (BOT) basis
- No berthing dues from vessels calling at captive jetty
- Wharfage charges as per the prescribed rates notified by the State Government.
- At the end of 30 years, the jetty, superstructure & facilities on jetty will revert back to MMB

2.4.2.2 Rewas-Aware and Dighi are both located in Raigad District, are in the process of development since March 2002. The developer of Dighi Port has issued work order for construction of first berth in November 2007. The Rewas-Aware Port Project has secured Environmental Clearance from M/o Environment & Forests in May 2007 and pre-construction activities as well as validation of some earlier data are in progress. Further, 3 more ports viz. Redi, Vijaydurg and Jaigad are likely to come up shortly. Letters of Intent have been issued to the concerned developers. The Concession Agreement to be signed for these port development projects is being examined. It is expected these ports to be ready for cargo handling in next 3-4 years. The proposed capacity of these ports is given in Table: 12.

Table 12 : Proposed Capacity Creation (In million tones per annum)		
Port	Initial Phase	Ultimate Phase
Rewas-Awara	47.00	127.00
Dighi	5.45	18.15
Jaigad (Dhamankhol Bay)	5.00	18.00
Jaigad	1.12	2.90
Vijaydurg	7.50	76.00
Redi	5.10	32.0

2.4.2.3 The trends in the cargo handled at both major and non-major ports of the State during the last five years are given in Table: 13.

Table : 13	Maharashtra: Trends in Cargo Handled at Major & Non-Major Ports (Million Tonnes)				
Major/Non-Major	2003-04	2004-05	2005-06	2006-07 (P)	2007-08 (P)
Major Ports	61.78 (14.1)	68.00 (11.1)	82.03 (20.7)	97.12 (16.5)	112.88 (16.16)
Non-Major Ports	10.33 (19.8)	12.14 (17.5)	11.16 (-8.1)	11.21 (5.8)	11.56 (-2.1)
All Ports	71.52 (14.9)	80.14 (12.0)	93.19 (16.3)	109.68 (19.95)	124.44 (14.18)
Figures in bracket represents 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 in 2005-06) with a depth of 4 meters.

2.4.3.2 The trends in the cargo handled at both major and non-major ports of the State during the last five years are given in Table: 14.

Table :14 Goa: Trends in Cargo Handled at Major & Non-Major Ports (Million Tonnes)					
Major/Non-Major	2003-04	2004-05	2005-06	2006-07 (P)	2007-08 (P)
Major Ports	27.87 (17.8)	30.66 (10.0)	31.69 (3.4)	34.24 (8.0)	35.13 (2.6)
Non-Major Ports	8.44 (51.5)	8.46 (0.2)	11.78 (39.0)	14.2[illegible] (21.[illegible])	12.83 (-10.3)
All Ports	36.31 (24.3)	39.12 (7.7)	43.47 (11.1)	48.55 (11.7)	47.96 (-1.5)
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 at Mangalore and 10 non-major ports in Karnataka. The ports of Karwar and Mangalore are two cargo handling non-major ports in the state.

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

Table :15 Karnataka: Trends in Cargo Handled at Major & Non-Major Ports (Million Tonnes)					
Major/Non-Major	2003-04	2004-05	2005-06	2006-07 (P)	2007-08 (P)
Major Ports	26.37 (24.4)	33.59 (27.4)	34.45 ([illegible])	32.04 (-7.0)	36.02 (12.4)
Non-Major Ports	1.17 (74.6)	3.81 (205.0)	4.12 (17.4)	2.22 (-46.1)	2.51 (13.1)
All Ports	27.54 (25.0)	37.40 (31.8)	38.57 (3.1)	34.26 (-11.2)	38.53 (12.5)
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 13 other non-major ports. The Vallarpadam Container Terminal Project in Cochin is being promoted on a BOT basis with 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 five years are given in Table: 16.

Table : 16 Kerala : Trends in Cargo Handled at Major & Non-Major Ports (Million Tonnes)					
Major/Non-Major	2003-04	2004-05	2005-06	2006-07(P)	2007-08(P
Major Ports	13.57 (4.2)	14.10 (3.9)	13.89 (-1.5)	15.26 (9.9)	15.81 (3.6)
Non-Major Ports	0.06 (-33.3)	0.08 (33.3)	0.14 (75.0)	0.17 (21.4)	0.17 (0.0)
All Ports	13.63 (4.2)	14.18 (4.0)	14.03 (-1.1)	15.43 (10.0)	15.98 (3.6)
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 six 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 The trends in the cargo handled at both major and non-major ports of the State during the last five years are given in Table17.

Table:17 Tamil Nadu: Trends in Cargo Handled at Major & Non-Major Ports (Million Tonnes)					
Major/Non-Major	2003-04	2004-05	2005-06	2006-07 (P)	2007-08(P)
Major Ports	59.57 (7.8)	68.19 (15.0)	73.56 (8.5)	82.13 (11.7)	90.20 (9.8)
Non-Major Ports	0.89 (15.3)	0.86 (23.2)	0.71 (-16.6)	0.64 (-9.9)	0.90 (40.6)
All Ports	60.46 (7.8)	69.05 (14.8)	74.27 (8.2)	82.77 (11.4)	91.10 (10.1)
Figures in bracket represents percentage change over the previous year /period				(P) Provisional	

2.4.6.3 Sethu Samudram Canal Project

2.4.6.3.1 The project envisages creation of a two-way navigational channel connecting the Gulf of Mannar to the Bay of Bengal through a dredged channel on either side of Palk Bay. Originating from Tuticorin Port crossing Adam's Bridge and passing through Palk Bay & Palk Strait, the project would end in Bay of Bengal.

2.4.6.3.2 The project is expected to reduce average distance by 335 Nautical Miles and reduce sailing time for the vessels operating to/from east and west coast of the country by 22.50 Hrs. The total cost of the project is estimated at Rs. 2427 crore. Tuticorin Port has been appointed as a nodal agency for implementing the project. The project work was inaugurated by Hon'ble Prime Minister on 2nd of July 2005.

2.4.6.3.3 The dredging work on Adams Bridge area was launched in December 2006. The quantity dredged up to September 17, 2007 is 11.89 million cubic metres. The work has been temporarily suspended since September 17, 2007 on the basis of order passed by Hon'ble Supreme Court of India. Dredging Corporation of India has been entrusted with the dredging work of a stretch in Palk Strait involving a length of 13.57 kms with an estimated quantity to be dredged at 13.66 million cubic metres. The quantity dredged up to 31.3.2008 at Palk Strait is 22.76 million cubic meters (Hopper Quantity).

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 The status of privatized ports and private investment in Andhra Pradesh Ports is as follows:

STATUS OF PRIVATISED PORTS

(i) Kakinada Deep Water Port was privatized in March 1999 to M/S ISPL on OMST terms for 20 years.

(ii) Krishnapatnam Port was privatized in January 1997 on BOOT terms to M/S Krishnapatnam Port Company Ltd.(NATCO) for 30 years. Revised agreement was signed on 17-9-2004. Navayuga Engineering company has taken 74% equity stake in KPCL and NATCO 26%.

(iii) Gangavaram Port was privatized in August,2003 for development of Deep Water Port on BOOT terms initially for 30 years.

PRIVATE INVESTMENT IN PORTS

(i) The proposed investments in approved port projects are (i) Gangavaram Port (Rs.2000crore); (ii) Krishnapatnam Port (Rs.950 crore) and (iii)Kakinada Deep Water Port Expansion (Rs 250 crore).

(ii) The projects under pipeline are (i) Machilipatnam Port (Rs.1000 crore); and (ii) Nizampatnam Port (Rs.1000 crore).

2.4.7.4 The trends in the cargo handled at both major and non major ports of the State during the last five years are given in Table 18.

Table:18 Andhra Pradesh: Trends in Cargo Handled at Major & Non-Major Ports(Million Tonnes)

Major/Non-Major	2003-04	2004-05	2005-06	2006-07 (P)	2007-08(P)
Major Ports	47.74 (3.8)	50.15 (5.0)	55.80 (11.3)	56.39 (1.1)	64.60 (14.6)
Non-Major Ports	10.02 (-2.1)	15.07 (50.4)	18.43 (22.3)	18.60 (0.9)	19.26 (3.5)
All Ports	57.76 (2.7)	65.22 (12.9)	74.23 (13.8)	74.99 (1.0)	83.86 (11.8)

Figures in bracket represents percentage change over the previous year period (P) Provisional

2.4.8 ORISSA

2.4.8.1 Orissa has about 476 kms coastline with one major port at Paradip and two non-major ports at Gopalpur and Dhamara which are being developed by private companies. There has been no cargo traffic during the last four years at non-major ports of Orissa.

2.4.8.2 The trends in the cargo handled at both major and non-major ports of the State during the last five years are given in Table19.

Table : 19 Orissa : Trends in Cargo Handled at Major & Non-Major Ports (Million Tonnes)					
Major/Non-Major	2003-04	2004-05	2005-06	2006-07(P)	2007-08(P)
Major Ports	25.31 (6.8)	30.10 (18.9)	33.11 (10.0)	38.52 (16.3)	42.43 (10.2)
Non-Major Ports	-	-	-	-	-
All Ports	25.31 (6.8)	30.10 (18.8)	33.11 (10.0)	38.52 (16.3)	42.43 (10.2)
Figures in brackets denote the percentage change over the previous year period				(P) Provisional	

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. Consultants have been short listed for for a modern deepsea port in West Bengal. Presently there is no cargo traffic at non-major ports.

2.4.9.2 The trends in the cargo handled at both major and non-major ports of the State during the last five years are given in Table 20

Table : 20 Trends in Cargo Handled at Major & Non-Major Ports – West Bengal (Million Tonnes)					
Major/Non Major	2003-04	2004-05	2005-06	2006-07 (P)	2007-08 (P)
Major Ports	41.26 (15.2)	46.21 (12.0)	53.14 (15.0)	55.05 (3.6)	57.28 (4.1)
Non-Major Ports	-	-	-	-	-
All Ports	41.26 (15.2)	46.21 (12.0)	53.14 (15.0)	55.05 (3.6)	57.28 (4.1)
Figures in brackets denote the percentage change over the previous year period				(P) Provisional	

2.4.10 OTHER NON-MAJOR PORTS

2.4.10.1 The other non-major ports are spread across the Union Territories (UTs) of Daman & Diu, Pondicherry, 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.

2.4.10.2 The trends in the cargo handled at both major and non-major ports of the State during the last five years are given in Table: 21.

Table : 21 Union Territories: Trends in Cargo Handled at Non-Major Ports(Million Tonnes)

	2003-04	2004-05	2005-06(P)	2006-07 (P)	2007-08 (P)
Andaman & Nicobar Islands	0.69 (-6.8)	0.88 (27.5)	0.92 (4.5)	1.66 (59.6)	1.56 (0.0)
Lakshadweep	0.03 (-83.3)	0.03 (0.00)	0.03 (0.00)	0.03 (0.0)	0.03 (0.0)
Pondicherry	0.11 (450.0)	0.06 (-45.5)	0.10 (66.7)	0.07 ([illegible])	0.01 (-85.7)

Figures in bracket represents percentage change over the previous year (P) Provisional

III. EFFICIENCY INDICATORS OF MAJOR PORTS

3.1 Over the last several years both physical performance of major ports has improved. Some key indicators of physical performance for select years and the last three consecutive financial years are given below.

3.2 Average Turn Round Time (TRT)

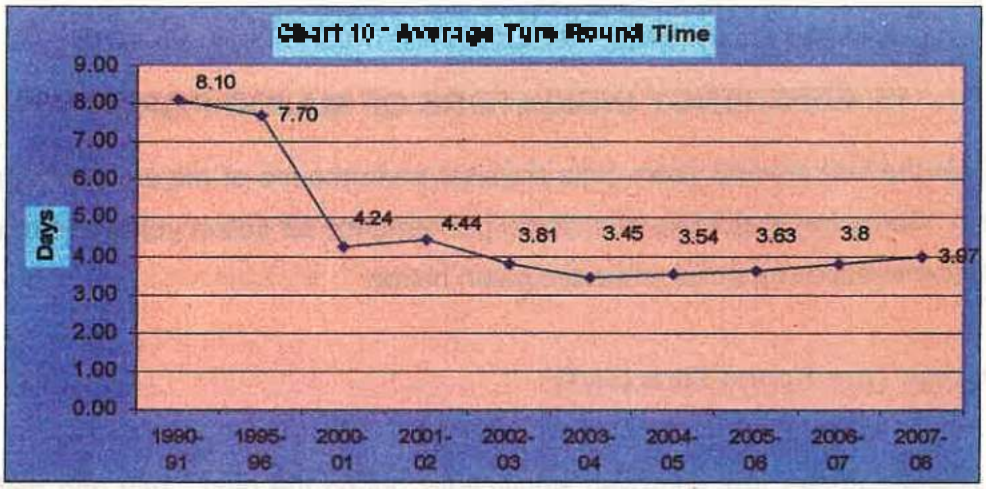
3.2.1 This parameter has improved significantly during the past one and half decades for all the major ports. Average TRT for all major ports improved from 8.10 days in 1990-91 to 3.63 days in 2005-06. During 2006-07 & 2007-08, the TRT however marginally increased to 3.80 and 3.97 respectively. During 2007-08 it varied between 1.85 days at JL Nehru Port to 5.54 at Paradip. Amongst the 12 major ports improvement in TRT during 2007-08 as compared to 2006-07 is discernible in case of Cochin, Mormugoa, Mumbai, Kandla and JL Nehru Port. Port-wise TRT for selected years are given in Table 22. The path of average turn round time at all ports level for selected years since 1990-91 to 2007-08 is presented in the Chart 10.

Table 22: Average Turn Round Time (days)

Port	1990-91	1995-96	2000-01	2005-06	2006-07	2007-08(P)
1	2	3	4	5	6	7
Kolkata D.S	11.90	8.63	5.50	4.12	3.89	4.67
Haldia D.C	6.47	6.86	3.77	4.89	4.87	4.45#
Paradip	6.40	6.29	4.16	3.56	3.54	5.54
Vishakhapatnam	7.07	7.57	3.71	3.79	3.65	3.9[illegible]
Ennore				2.23	1.89	2.08
Chennai	7.30	7.60	5.83	3.32	3.36	4.55
Tuticorin	4.70	5.84	4.10	2.83	3.67	3.80
Cochin	4.00	4.00	3.11	2.70	2.75	1.99
New Mangalore	4.58	5.13	2.89	3.06	3.14	3.26#
Mormugoa *	6.40	6.61	4.25	4.32	4.46	4.03
J.L.Nehru		5.70	2.21	1.97	1.94	1.85
Mumbai	10.80	7.40	6.20	4.06	4.63	4.44
Kandla	10.00	14.77	4.72	4.39	5.46	5.13
All Ports	8.10	7.70	4.24	3.63	3.80	3.97

(P) Provisional * Relate to Vessels handled at Berth;# Exclude PBD on non-Port account

Source: Major Ports/ Indian Ports Association (IPA)



3.3 **Average Pre Berthing Detention Time (PBDT)**

3.3.1 The average overall pre berthing detention time for all major ports declined from 2.2 days in 1990-91 to 1.2 days in 2006-07. In contrast, average PBDT on port account has seen a sharper decline from 2.10 days in 1990-91 to 0.35 day in 2005-06, but has edged upwards to 0.46 days in 2007-08 for all major ports. However, average PBDT (on Port a/c) has varied from a low of 0.01 day at Kolkata DS to 1.4 days at Haldia DS. Improvement in average PBDT is noticeable in all major ports in 2007-08 as compared to 2006-07 in case of all major ports. Port-wise PBD for select years is indicated in Table 23. The trajectory of weighted average pre berthing detention time at Major ports total and port account during 1990-91, 1995-96 and 2000-01 and onwards is given in Chart 11.

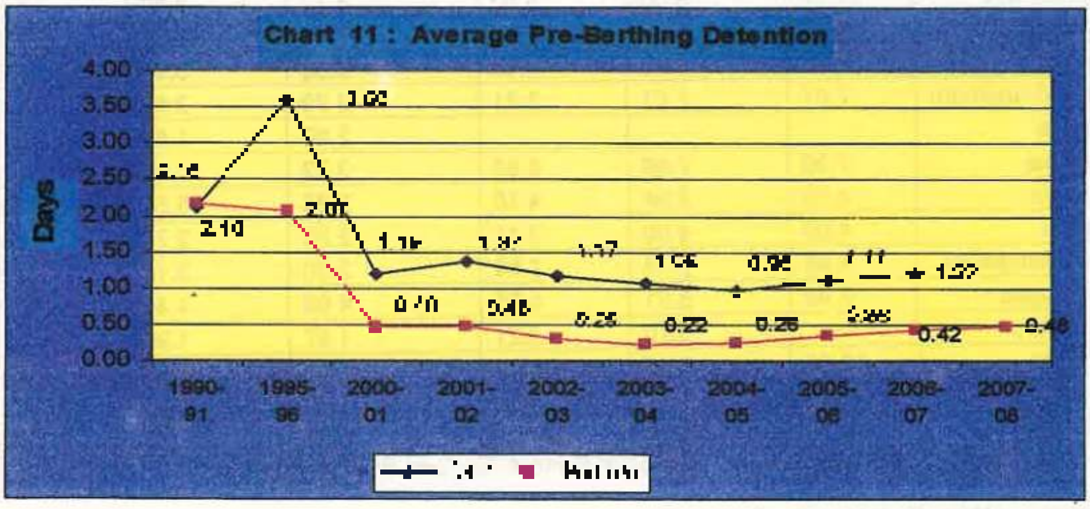


Table 23 : Average Pre-Berthing Detention(Days)						
Port	1990-91	1995-96	2000-01	2005-06	2006-07	2007-08(P)*
Kolkata (KDS)	3.80	1.38	0.61	0.40	0.29	0.01
Haldia DC	1.89	2.81	0.91	2.15	1.90	1.38
Paradip	1.88	2.49	1.41	1.04	1.09	0.08
Visakhapatnam	1.85	2.90	2.75	1.03	0.83	0.21
Ennore				0.19	0.13	0.03
Chennai	2.10	3.41	2.45	0.55	0.68	0.64
Tuticorin	0.80	2.25	1.40	0.75	1.24	0.18
Cochin	0.62	1.26	0.71	0.67	0.69	0.66
New Mangalore	0.75	1.75	0.77	0.74	2.64	0.08
Mormugao	2.51	2.58	1.32	2.11	2.55	0.76
J.L.Nehru		2.60	0.57	0.86	0.91	0.43
Mumbai	8.40	4.50	1.20	1.09	1.17	0.21
Kandla	4.40	8.90	1.51	1.58	2.38	1.35
All Ports	2.18	3.60	1.18	1.11	1.22	0.45

(P): Provisional. * Relates to Port Account only. Source: Major Ports/ Indian Ports Association (IPA)

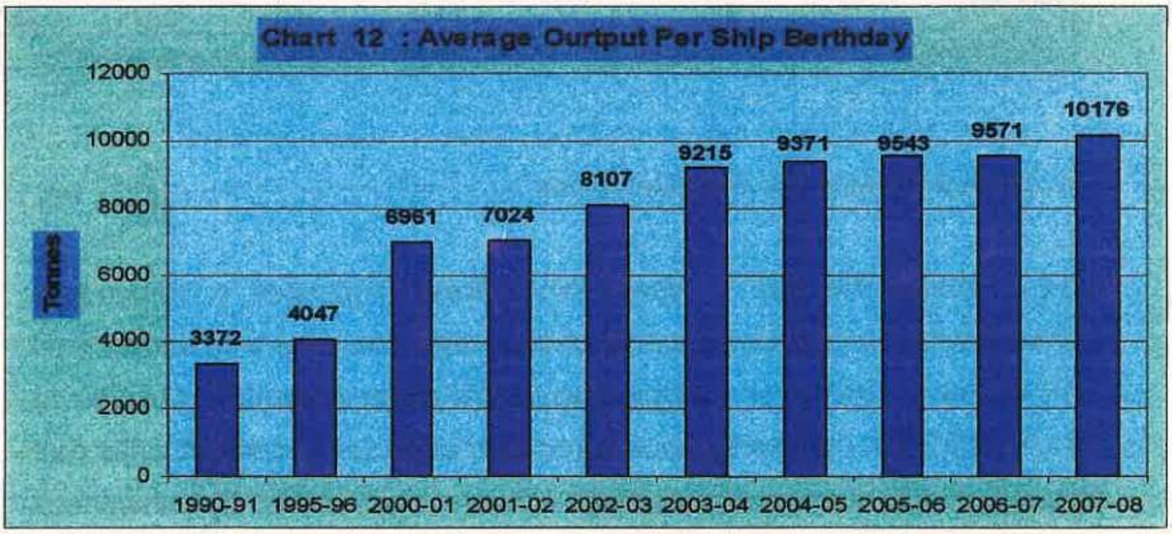
3.4 Average Output Per Ship Berth-day

3.4.1 During the last 15 years this indicator has seen a tremendous improvement. Average Output per Ship-berth day has more than trebled from 3372 tonnes in 1990-91 to 10175 tonnes in 2007-08 at all major ports level. In the year 2007-08, the average output per Ship-berth day at 10175 tonnes was higher by 6.3 % compared to 2006-07. However, it is marked by tremendous variation across major ports ranging from a high 35,251 tonnes in case of Ennore to a low of 3702 tonne at Kolkata DS. This huge variation reflects the type of cargo being handled, level of mechanization and labour practices. The increase in average output per ship berth day was of the order 32% in Cochin followed by Mumbai (21.1%), JNPT (17.5%), Kandla (12.6%), Tuticorin (5.8%), Chennai (5.4%) and Ennore (0.4%). Port-wise average output per Ship-berth day for selected years and last three consecutive years are given in Table:24.

Table 24 : Average Output per Ship-Berth-Day (Tonnes)						
	1990-91	1995-96	2000-01	2005-06	2006-07	2007-08(P)
1	2	3	4	5	6	7
Kolkata D.S	930	1180	2075	3891	4480	3702
Haldia D.C	5958	5695	6364	8755	8793	8219
Paradip	4082	6329	8502	11216	11785	11181
Visakhapatnam	5325	5790	9495	10552	10858	10803
Ennore				38814	25112	33251
Chennai	3912	4750	6377	10878	9814	10247
Tuticorin	2130	2907	3850	5380	5052	5319
Cochin	3714	5804	6132	7778	5282	10694
New Mangalore	4412	6567	12193	16057	13073	12654
Mormugao	10429	8878	12698	16834	17299	17105
J.L. Nehru		3565	8563	16150	17196	20171
Mumbai #	2310	2575	4212	6314	5542	7138
Kandla	4117	5230	6238	8700	8971	11049
All Ports	3372	4047	6961	9543	9571	10176

(P) Provisional. # Includes Stream Vessels except for 2007-08. (Source: Major Ports, Indian Ports Association (IPA).

3.4.2. The average out-put per ship-berth-day for selected years since 1990-91 is presented in the Chart 12.



IV. PRIVATE SECTOR/CAPTIVE/JOINT SECTOR PORT PROJECTS

Brief details of the approved Private Sector/Captive/Joint Sector Port Projects and a list of these projects under consideration as on 31.03.2008 are brought out in Appendix-I, Appendix-II in respect of Major Ports and in Appendix-III, Appendix-IV for Non –Major Ports.

Mormugao
Mumbai
Ennore
New Mang
JNPT
Cochin

Appendix – 1

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

Sl. No	Project Name	Port Name	Capacity (Million Tonnes)	Project Cost (Rs. Million)	Project Status
1	2	3	4	5	6
1.	Marine Liquid Terminal (BOT Basis-Licensee Ennore Tank Terminal Pvt. Ltd.	Ennore	3 MTPA	1903	Environmental clearance has to be obtained. All other permits relevant during construction & operation phase has to be obtained by Licensee. Certain representations and warranties set in the License Agreement. Likely date of completion is October, 2000.
2	Construction of Coal terminal on BOT Basis.	Ennore	8 MTPA	2031	Jetty construction work is in progress. Likely date of commission is August, 2010.
3	Construction of Iron Ore Terminal on BOT Basis	Ennore	12 MTPA	4930	Soil investigation work is in progress. Likely date of commission is August, 2010
4.	Extension of container berth by 330 m. towards north	Jawaharlal Nehru		5000	M/s. UTI Bank has been appointed as Adviser for the project. The Adviser has submitted Feasibility Report. The Board has approved to take-up the work in BOT basis. In Principle approval from MoSRT&H has been received on 25.9.2007 to go ahead with global competitive bidding. Accordingly Port is in process for Invitation of RFQ. Draft RFQ document modified as per the model RFQ document circulated by Ministry of Finance. The same will be sent to Ministry along with PPPAC filled up form shortly. Likely date of commissioning January, 2010.
6.	Construction of two New Off-shore Container berths & Development of Container Terminal berth on BOT basis in Mumbai Harbour.	Mumbai Port	0.20 MTEUs	12280	i) LOI issued to BOT operator M/s. Gammon India Ltd. on 5.6.2007. Performance Guarantee from BOT Operator received on 25.6.2007. Agreement signed on 3.12.2007. (ii) Draft PIB for sanction of estimate of MbPT component of project sent to Ministry on 21.8.06. Govt.'s approval received on 19.11.07. (iii) Govt. has approved on 16.7.07 for appointment of M/s. CES as

					PMC. Appointment of PMC made on 23.7.2007. Inception report received on 12.9.07. (v) Tender for MbPT component of work invited on 21.2.08 & is due for submission on 7.5.08. Anticipated date of completion is Dec., 2010
6.	Development & Operation of Container Terminal (BOT Basis – M/s ABG Industries)	Kandla Port	7.20MTPA	4485 (Investment of Port is 1160 and that of M/s ABG is 3300)	Ministry approved proposal for Container Terminal on 31-3-06. LOI issued on 31.3.06 and same has been accepted on 17.4.06. License Agreement signed on 23.6.06. 11th Cargo berth & 22 hectares of back-up area handed over to M/s ABGKCTL on 23.10.06. 2 Nos. Harbour Mobile Cranes received. The 1st phase of terminal commenced from 10th March, 2007. 2nd Phase is expected to be commissioned by March, 2009.
7.	Development of existing 8th Berth as Container Terminal	Tuticorin	3.6	1500	The RFQ stage has been completed. PPPAC Clearance is sought.
8.	Development & Operation of International Container Transhipment Terminal (ICTT) at Vallarpadam (BOT basis by M/s India Gateway Terminal Pvt Ltd. A subsidiary of M/s. Dubai Ports International)	Cochin	Capacity addition of 12.5 to 40 MMT in phases	18650	Environmental clearance for the Phase I – Development of terminal facilities for the ICTT was issued by MoE&F. Port had issued consent on 27.3.2007 to the Preliminary Design of ICTT furnished by M/s. India Gateway Terminal Pvt. Ltd. Construction drawings furnished by M/s. IGTPL. Rail connectivity project is implemented through Indian Railways by funding from Deptt. of Shipping and RVNL is the execution agency. RVNL have issued the work order to M/S. Afcon Infrastructure Ltd. on 21.2.2007 & the construction activities commenced on 23.3.2007. Earthwork for approaches, piling work and substructure for A2 abutment of major bridges VR4 completed. Substructure for A1 abutment in progress. Piling work commenced on 15.5.2007 and is in progress. Casting of I-Girders and trough girder are in progress.

No information from Haldia, Tuticorin & Chennai Ports has not been received. Latest available information is given in respect of these ports.
Source: Major Ports.

Appendix – III

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

Sl. No	Project	Port Name	Capacity (Million Tonnes)	Project Cost (Rs. Million)	Project Status
1	2	3	4	5	6
1.	Construction of Deep Draught Iron Ore berth on BOT-PPP basis.	Paradip	10 MTPA	5048	The proposal for fixation of upfront tariff cap has already been submitted to TAMP for necessary approval. After receiving the approval, the same will be incorporated in the RFP documents.
2.	Construction of Deep Draught Coal Berth on BOT-PPP basis	Paradip	10 MTPA	3878	The proposal for fixation of upfront tariff cap has already been submitted to TAMP for necessary approval. After receiving the approval, the same will be incorporated in the RFP documents.
3	Development of Southern Dock Complex (4 Berths) on BOT-PPP basis	Paradip	16 MTPA	3006	Feasibility study is under progress.
4	Construction of Container Terminal (BOT-Basis)	Ennore Port	15 MTPA	13000	RFQ for selection of the operator published on 7.3.2008. The last date for submission of application has been extended to 20.6.08. Likely date of commission is Jan., 2011.
5.	Construction of LNG Terminal (Joint Venture)	Ennore Port	5 MTPA	27000	'In Principle' approval for the proposal for development of LNG berth through joint venture with IOC/TCPCL granted by the Ministry on 10.7.2006. IOCL informed on 22.10.2007 that IOC is entering into an MOU with Petronet LNG Ltd. for jointly developing the proposed LNG terminal through a JV.
6.	Construction of general cargo berth	Ennore Port		1300	Response to additional inputs/comments of EPL sought by DoS for taking up multipurpose general cargo berth project by EPL on its own instead of taking up in BOT form was submitted 11.4.2008.

7.	4th Container Terminal & Marine Chemical Terminal (BOT Basis)	Jawaharlal Nehru Port	1.5 MTEUs & 6 MTPA	41000 Phase-I	Feasibility Report is submitted by Consultant M/s. Consulting Engineering Services. EOI for the development of the project is invited. 41 parties have submitted the EOI and same are under scrutiny.
8.	New Cruise Terminal near Gateway of India (BOT Basis)	Mumbai Port	-	1473	Proposal to appoint M/s Zaban Yarlie Consultant (I) & Services for carrying out feasibility study sent to Ministry on 22.6.07 for sanction which has been approved on 10.10.07 & consultant appointed on 18.10.07. Site selection report submitted on 16.1.08. Draft DPR from consultant is expected in June, 2008. Expected date of commencement agreement is April 2009.
9.	Construction of 13th to 16th cargo berths	Kandla Port	8 MTPA	4400	11 bidders have been pre-qualified for the project. PPPAC in its meeting held on 27.12.2006 has granted final clearance to the proposal. CCEA approval is to be obtained. Meantime proposal for getting security clearance in respect of 11 bidders from Ministry of Home has been sent to MOSRT&H on 10.8.2007
10.	Creation of berthing and allied facilities off Tekra near Tuna (Outside Kandla Creek)	Kandla Port	12 MTPA	4820	Work order for conducting CEIA studies has been placed in favour of NIOT, Madras. The REIA Report submitted by M/s. NIOT, which is under finalisation. The work of Geotechnical Investigation has been completed. IIT, Madras has submitted techno-economical feasibility report. A proposal seeking in principle approval from PPPAC has been sent to MoS on 20.9.2006 and approval awaited. Till date 19 entrepreneurs have shown their keen interest. The modified proposal with two options of implementing the project was sent to MoS on 4.7.2007 for getting in-principle clearance from PPPAC.

11.	Installation of transporting, stacking, handling & loading plant of Iron Ore (BOT Basis-Private Sector)	New Mangalore	3 MTPA (Capacity of Jetty)	1080	Govt. approval has been conveyed on 24.8.2006. Ministry has directed to revise the RFP and MCA. The bids invited stands cancelled and revised RFP and MCA will be circulated to the already short listed bidders. The security clearance for the subject proposal is awaited.
12.	Construction and development of Container Terminal on BOT basis	New Mangalore	NA	3000	The proposal to create a Container Transhipment Terminal at New Mangalore Port was included in Tenth Five Year Plan under BOT scheme. The port has got certain advantages like deep draft and also proximity to international sea route for setting up of Container Transhipment Terminal. However this requires further study and also building up confidence by the private operators. The project will be taken up at appropriate time. Business Plan of Port also suggest that the Port can initiate action once the TEUs expected to reach 1,00,000 TEUs
13.	Allotment of land for the construction of Cruise Lounge.	New Mangalore	-	-	Since no response has been received for the expression of interest, the Port has decided to construct the cruise lounge by modifying one of its existing shed at Berth No. 4 from its internal resources. Tenders received for Licensing out the operation and maintenance of Cruise Lounge under BOT basis is under evaluation.
14.	Dedicated Berth for Suzlon	New Mangalore	NA	1420	In-principle approval of the Ministry has been received to provide Port facilities to M/s. Suzlon. M/s. SBI Capital Markets Ltd. has been appointed for preparation of License Agreement and Determination of Tariff Structure for captive facilities. The feasibility study regarding fixing of tariff will be finalized shortly.

15.	Construction of Coal Jetty by M/s. Nagarjuna Power Corporation Ltd (NPCL) (Captive User)	New Mangalore	3.00 MTPA	2300	The revised draft MOU and the proposal for allotment of land and water front at the changed location was placed before the Board meeting held on 20-10-2004. The Port Trust Board has approved the proposal. Accordingly the matter was been referred to the Ministry on 10-11-2004 for approval. The Ministry vide their letter dated 5-4-2005 have made certain observations on the proposal. As directed by the Ministry 'Expression of interest' for handling coal for Thermal Power Plant located nearby Mangalore has already been invited. Except NPCL none of the firms have responded. M/s TECBOM has calculated the upfront fee and royalty rate afresh. M/s IDFC has prepared the Draft License Agreement to be entered between NMPT and M/s NPCL. The proposal consisting of License Agreement and report on the minimum royalty to be fixed for bulk coal handling facility have been submitted to the Ministry on 24-8-2005. Approval to the draft License Agreement and approval to Captive Jetty under Section 42 (3) and 3 (A) have been received from the Ministry. Approval of the Ministry is awaited.
16.	Allotment of waterfront & back-up land for providing bunkering facilities at NM Port (BOT Basis)	New Mangalore	NA	Yet to be decided	M/s. NSDRC have furnished the final feasibility report and the same has been approved by the Port Trust Board in-principle approval from the Ministry is sough for to Invite bids on BOT Basis. Ministry has asked some clarifications on the feasibility report which has been clarified on 8.1.08. Expression of Interest has been called for from the parties who are interested for "Creation of Bunkering Facilities on BOT Basis to the ships at Anchorage/

					Offshore location stipulating the last date for submission of willingness as on 30.6.06. 4 firms have submitted their willingness which are under scrutiny. It is proposed to invite bids on open competitive model Land Management Guidelines instead of BOT scheme. Approval of the Ministry has been requested on 15.2.2007.
17.	Development of berth WQ-6 for multi cargo in the Inner Harbour for multi cargoes on BOT basis.	Visakhapatnam	1.10	930	Revised RFQ will be issued duly including equipment cost.
18.	Construction of EQ-10 Berth in Inner Harbour for handling Liquid Cargo & Chemicals on BOT Basis.	Visakhapatnam	1.00	422	Tariff fixation as per guidelines is being sent to TAMP for approval.
19.	Installing Mechanized Coal Handling Facilities at General-cum-bulk at Outer Harbour (BOT basis).	Visakhapatnam	3.6	3350	RFQ duly incorporating the cost of strengthening and deepening by Port for 200000 DWT vessels.
20.	Installation of mechanised unloading facilities for fertilizers at Inner Harbour On BOT basis.	Visakhapatnam	3.6	2200	Draft final Techno economic Feasibility Report submitted by IPA on 31.3.2008 is under examination.
21.	Designing, Construction, Financing, Developing, Operating and maintaining suitable facility for handling any type of Bulk and or Break Bulk cargo excluding Containers at berth No. 7 on BOT basis	Mormugao	To handle rail sound iron Ore from Bellary Hospet Region and other cargoes.	1400	The sanction from Govt. was received with certain pre-conditions. As per the deliberation and the time frame fixed, it was decided in the meeting on 12-13 March, 2008 to develop Berth No. 7 as coal handling terminal. It has been decided to close the tenders for appoint of PMC. The Port will carry out in-house feasibility study. A transaction advisor will be appointed to certify various transaction of the project.
22.	Construction of Two additional Berths at Vasco Bay	Mormugao	5.0	2500	The Ministry has been informed that the Port proposes to close the tender for appointment of consultant for preparation

					of DPR and invite bidders for appointing consultant for preparation of feasibility report.
23.	Setting up of an International Bunkering Terminal	Cochin	5MTPA	500	'In principle' approval has been received from the Ministry for establishing an International Bunkering Terminal at Cochin Port under license system. The Port had invited & received RFQ bids for the Bunkering Terminal Project. During the interactions with the prospective operators they informed that their expertise is in the procurement, storage and supply of bunkers and they are not having expertise in the construction and operation of the terminal facilities and the operation of terminal facilities for the receipt of bunker vessels. Their general consensus was that Port should provide storage and supply facilities. It has been proposed that the terminal facilities to be constructed with the internal resources of the Port and land be made available on lease to the operators for establishment and operation of the bunkering facilities. As such the original proposal of construction of bunkering terminal under PPP model has been shelved.
24.	Setting up of an International Cruise Terminal at Cochin (Joint Venture through BOT)	Cochin	-	-	Work order issued to M/s. MIR Projects & Consultants, Kochi and M/s. Transystems, USA on 11.5.07 for preparation of a feasibility report & business plan to develop an international cruise terminal-cum-public plaza at Willingdon Island for a total lumpsum charge of Rs. 78,00,000/- excluding service tax. Consultants furnished the final feasibility report and business plan on 31.3.2008.
25.	Setting up of LNG Regasification Terminal at	Cochin	Initial 2.5 MMTPA Final 5	32005	An area of 32.28 hectare of land at Puthuvypeen has been allotted to M/s PLL to

	Puthuvypeen by M/s. PLL on captive basis		MMTPA		set up the Terminal. Site Leveling Work arranged through by PLL has been completed. PLL have awarded the work of 'Construction of Boundary Wall for LNG Terminal is in progress. The scheduled date of commissioning the Terminal 2011.
25.	Development of Second Container Terminal on BOT Basis	Chennai	8 Lakh TEUs	401.78	RPF bids were received from three qualified applicants and Technical bids opened on 7-11 2005. Clarifications were obtained from the bidders. Price bid opening deferred till 15-06-06 as advised by Ministry pending security clearance for bidders. The award of work and signing of License Agreement was expected during Sept., 2006.

Note: Latest information from Haldia, Tuticorin & Chennai Ports has not been received. Available earlier information is given in respect of these ports.
Source: Major Ports.

Appendix – III

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

Sl. No	Project Name	State/ Maritime Board	Capacity (Million Tonnes)	Project Cost (Rs. Million)	Project Status
1	2	3	4	5	6
1.	Development of Azhikkal Port-Phase-I (By State Govt.)	Azhikkal (Kerala)		52.5	The Scheme may be extended in June 2007.
2.	Kakinada Anchorage Port	Kakinada, A.P.	0.20 MT	400	In progress. Likely date of completion is March, 2006
3	Kakinada Deep Water Port Project (PPP)	Kakinada Deep Water Port, A.P.	0.60 MT	800	Scheme completed.
4.	Rawa Port Project (Captive Jetty)	Rawa port A.P.	0.10 MT		In progress. Likely date of completion is March, 2009
5.	Gangavaram Port(PPP-BOOT)	Gangavaram A.P.		9200	In progress. Likely date of completion is August, 2008
6	Krishnapatnam Port (PPP-BOOT)	Krishnapatnam, A.P.		1000	In progress. Likely date of completion is August, 2008
7.	Nizampatnam Port(PPP-BOOT)	Nizampatnam A.P.			In progress. Likely date of completion is March, 2012
8	Machilipatnam Port (PPP-BOOT)	Machilipatnam, A.P.			In progress. Likely date of completion is March, 2011
9.	Development of all weather and Multi user Port on BOOST basis by M/s Amma Lines Ltd.	Maharashtra	To become hub port in South Asia with draft 20 Mtrs 44.7 MTPA (1.7 MTEUs) container	43000	Share holding pattern approved. Environmental clearance awaited. Anticipated date of completion is 2010
10	Development of all weather and Multi user Port on BOOST basis by M/s. Balaji Infra Projects Ltd.	Maharashtra	5 MTPA in phases 18.5 MTPA (0.22 MTEUs) Container	6000	Detailed engineering designs under scrutiny. Anticipated date of completion is 2008
11.	Thiruchopuram Port/Nagarjuna Oil Corporation Ltd.	Tamil Nadu	9.8	8000	Construction to be commenced.
12	Coal Handling Jetty/Cuddalore Power Co. Ltd	Tamil Nadu	2.6	3230	Detailed project report under preparation.
13.	Silambimangalam Shipyard/Good earth Ship-building Pvt. Ltd.	Tamil Nadu	-	15000	Detailed project report under preparation
14.	Thirukkuvalai Port/ Tridem Port & Power Co. Pvt. Ltd.	Tamil Nadu	20	7500	Detailed project report under preparation.
15	Kattupalli Port/ Shipbuilding Ltd	Tamil Nadu	-	12000	Detailed project report under preparation.
16.	Manappad Port/ Indian Gas Ltd	Tamil Nadu	-	10000	Detailed project report under preparation

17.	Construction of Modern Dry Dock for Ship repair (BY BOOT Basis by 'Three Circle Contractors', Mumbai)	Diu (Daman & Diu)		200	The private party has withdrawn from the project. Hence U.T. Admn. of Daman and Diu has closed the process of Modern Dry Dock for Ship Repair Yard at Malala in Diu district and decided to re-invite fresh proposals. The concerned party has asked for Arbitrator and hence the project is delayed

Note : Latest information in respect of maritime States/UTs other than Andhra Pradesh, Tamil Nadu & Diu is not available. Earlier available information is given in respect of responded States/UTs.
Source : Maritime States/Maritime Boards

Appendix – IV

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

Sl. No	Project	State/ Maritime Board	Capacity (Million Tonnes)	Project Cost (Rs. Million)	Project Status
1	2	3	4	5	6
1.	Landing facilities for cargo & passenger vessel	Diu		20	Proposal is submitted for approval of Ministry.
2.	Cargo & Passenger Landing Facility at Mosla on BOT basis.	Diu		600	Proposal is submitted for approval of Ministry
3.	Kakinada Anchorage Port	Andhra Pradesh	1.00 MT	100	The work is in progress.
4.	Kakinada Deep Water Port (PPP-BOOT) by M/s KPCL	Andhra Pradesh	3.80 MT	2300	Scheme completed.
5.	Rawa Port Project (Captive Jetty-BOOT) by M/s Cairn Energy Ltd.	Andhra Pradesh	0.50 MT		Likely date of completion is March 2008
6.	Gangavaram Port (PPP-BOOT) by GPL	Andhra Pradesh	35 MT	20000	Work is in progress. Likely date of completion is 03/2008
7.	Krishnapatnam Port (PPP BOOT) by M/s KPCL	Andhra Pradesh	17 MT	8500	Work is in progress. Likely date of completion is August 2008
8.	Machilipatnam Port(PPP-BOOT) by Maytas India	Andhra Pradesh	10 MT	10000	Likely date of completion is March 2012.
9.	Machilipatnam Port (PPP-BOOT) by M/s MTHAS	Andhra Pradesh	12 MT	10900	Likely date of completion is March 2011.
10.	Development of Jaigarh Port by M/s Chowgule Steamships Ltd. (BOOST basis)	Maharashtra	4.02 MTPA	3854.2	LOI issued in September 2006. Likely date of commission is 2010
11.	Development of Vijaydurg Port (BOOST basis)	Maharashtra	7.6 MTPA	10000	Proposal under scrutiny
12	Development of Redi Port	Maharashtra	7.4 MTPA	8500	Proposal under scrutiny
13.	Development of Captive port facilities at Dhamankhol Bay (Jaigarh)-BOOT basis by M/s JSW Infrastructure and Logistics	Maharashtra		4000	LOI issued in September 2006. Likely date of completion is 2008
14.	Development of captive port facilities at Girye Bay near Vijaydurg Private	Maharashtra	Captive port facilities for import of coal for proposed 4000 MW ultra Mega Power plant.		Power financing corporation is handling the project. Pre bid conference held in Sept. 2006

Sl. No	Project	State/ Maritime Board	Capacity (Million Tonnes)	Project Cost (Rs. Million)	Project Status
1	2	3	4	5	6
15	Establishing a captive port at Marakkanam in Villupuram District	Tamil Nadu	8 MT	13800	Preparation of Detailed Project Report under progress.
16	Establishing a captive port in Cuddalore District	Tamil Nadu	14 MT	4800	Preparation of Detailed Project Report under progress.
17.	Establishing a captive port at Thirukkadaiyur in Nagapattinam District	Tamil Nadu	4.5 MT	3850	Preparation of Detailed Project Report under progress.
18.	Establishing a captive port at Cheyyur in Villupuram District	Tamil Nadu	11 MT	5000	Preparation of Detailed Project Report under progress.

Annex -1

Plan Outlay and Expenditure : Port Sector (Central Sector)

(Rs. Crore)

Name of the Port	Xth Plan Outlay	Annual Plan 2002-03		Annual Plan 2003-04		Annual Plan 2004-05		Annual Plan 2005-06		Annual Plan 2006-07		Annual Plan 2007-08	
		Oly.	Exp	Oly.	Exp.	Oly.	Exp.	Oly.	Exp.	Oly.	Exp.	Oly.	Exp..
1	2	3	4	5	6	7	8	9	10	11	12	13	14
Kolkata (a)	789.42	199.92	6.85	210.30	10.48	46.22	47.55	54.04	59.66	50.04	71.99	[illegible].37	63.05
Mumbai	880.20	109.05	100.76	54.21	[illegible]	[illegible].15	44.49	74.53	19.23	59.86	14.55	50.36	[illegible]
JNPT	262.75	146.36	40.26	143.02	12.73	[illegible].14	58.85	96.84	65.77	[illegible].14	40.71	[illegible].18	70.28
Chennai	326.70	95.99	85.50	36.69	[illegible]	16.75	22.68	46.71	[illegible]	35.00	26.07	[illegible]	[illegible]
Cochin	[illegible]		10.02	18.88	10.86	[illegible]	9.52	[illegible].12	24.76	73.84	72.89	158.52	[illegible].07
Visakhapatnam	240.84	47.06	51.30	51.00	55.65	54.44	[illegible].68	[illegible].00	17.68	27.33	43.80	83.00	[illegible]
Kandla	[illegible]	94.78	[illegible].89	[illegible]	41.50	92.98	52.89	93.30	[illegible].29	94.66	[illegible].19	[illegible].49	38.25
Mormugao	348.06	30.86	26.53	[illegible].14	43.06	53.85	11.05	33.50	7.92	28.06	[illegible].77	[illegible]	11.18
Paradip	222.70	[illegible].00	[illegible].42	53.40	14.56	[illegible].16	28.99	116.00	44.02	83.40	[illegible]	100.00	42.05
New Mangalore	147.40	[illegible].00	[illegible]	25.00	5.14	20.00	29.60	[illegible].00	18.09	18.00	18.02	36.00	25.81
Tuticorin	230.00	[illegible].10	36.02	17.54	21.84	25.81	5.48	[illegible].47	13.56	[illegible]	29.11	[illegible].46	[illegible]
Ennore Port Ltd.	300.00	1.00	0.00	150.00	0.99	95.00	2.32	76.00	13.40	70.00	9.57	[illegible].00	34.53
Sethusamudram Ship Canal	0.00	0.00	0.00	0.00	0.00	10.00	0.00	[illegible].00	150.00	304.00	334.66	664.22	[illegible]9.47
WEB Based Port Community System	0.00	0.00	0.00	0.00	0.00	0.00	0.00	6.00	0.34	7.83	1.66	7.50	0.04
Others (b)	[illegible].00	[illegible]4.88	[illegible].98	[illegible].00	44.06	[illegible].04	[illegible].87	[illegible]	[illegible]	[illegible].78	213.64	[illegible].26	[illegible].67
Survey Vessels	300.00	45.00	5.95	50.00	0.00	100.00	0.00	50.00	0.00	20.00	0.00	[illegible].00	0.00
Total	[illegible]18.29	[illegible].00	[illegible].89	1200.89	[illegible].89	1066.95	[illegible]	1163.45	[illegible].97	1364.25	[illegible]	[illegible]	[illegible]

(a) Includes Haldia & [illegible]

(b) [illegible] R&D Studies, [illegible] Minor Port Studies, etc

Source: Department of Shipping [illegible]

Plan Outlay and Expenditure : Ports & Light Houses (State Sector)

(Rs.Lakhs)

STATES/UTs	Xth Plan Outlay	Annual Plan 2002-03		Annual Plan 2003-04		Annual Plan 2004-05		Annual Plan 2005-06		Annual Plan 2006-07	
		Re. Oty	Exp	Re. Oty	Exp.	Re.Oty.	Exp.	Apr.Oty.	Exp.	Apr.Oty	Re.Oty.
1	2	3	4	5	6	7	8	9	10	11	12
States	20691	5461	3964	5013	2030	6067	5583	7485	3482	13043	14710
1. Andhra Pradesh	838	1000	2233	200		5150	3739	5150	3395	5150	4850
2. Goa	75	5	2	17	1	20	24	71	8	70	70
3. Gujarat	0	0	0	0	0	0	0	0	0	0	0
4. Karnataka			496			524	535	575	571	690	700
5. Kerala	6000	720	367	1226	474	653	790	1075	695	4490	4990
6. Maharashtra	20000	3644	1759	3390	1558		290	346	672	1500	1500
7. Orissa	1325	67	509	200	367	50	215	150	178	130	100
8. Tamilnadu	3000	0	0	0	0	0	5	5	18	898	2500
UTs	17032	2349	2044	2890	2075	3798	2409	4046	5462	8726	5739
9. A&N Islands	7146	1180	1477	1500	1500	1896	1514	2377	3309	4953	4869
10. Daman & Diu	1800	23	23	34		34	32	82	29	63	62
11. Lakshadweep	7706	1745	175	751		258	291	365	425	275	270
12. Pondicherry	2000	400	368	575	575	1000	331	1500	1490	3400	459
Total(State+UT)	47720	9805	7410	7903	4425	9865	8087	11531	10344	21769	20449

Exp. Expenditure Re.Oty.Revised Outlay. Apr.Oty. Approved Outly.

Source: Planning Commission

Annex-3

Commodity-wise Traffic Handled at Major Ports

(000 Tonnes/TEUs)

Port	Period	POL & its Products	Iron Ore	Therm Coal	Other Coal	Ferti.& FRM$	Food Grain	Container Tonnes	Container TEUs	Others	Total
Kolkata	2004-05	5534	28		8		35	2357	159	1983	9945
	2005-06	4934	146		46	[illegible]	10	3234	203	2433	10806
	2006-07	5181	196		38	[illegible]	37	4003	239	3126	12596
	2007-08	4523	488			11	560	5139	297	3020	13741
Haldia	2004-05	16474	5366	3157	5743	941	49	2029	129	2503	36262
	2005-06	17689	7941	3408	7099	1425	34	1910	110	2831	42337
	2006-07	18054	8312	2443	7383	1393	7	1918	110	2944	42454
	2007-08	17841	9821	1797	5462	713	7	2242	128	5658	43541
Paradip	2004-05	839	9051	10942	3267	3418		31	2	2556	30104
	2005-06	910	10273	12529	3758	2496		49	3	3094	33109
	2006-07	1376	11880	12475	[illegible]	4254		31	2	2847	38517
	2007-08	1764	12960	13348	4733	3556		54	4	6023	[illegible]
Visakha-patnam	2004-05	14628	16587	2524	7573	2441	825	635	46	4935	50148
	[illegible]	16941	16170	2740	9427	3624	543	631	47	5725	55801
	[illegible]	18178	14718	[illegible]	9860	3916	980	799	56	5528	56385
	2007-08	19803	[illegible]	2895	[illegible]	[illegible]	486	1133	71	10122	64597
Chennai	2004-05	11422	9615	1976	[illegible]	[illegible]	30	9864	617	4333	43806
	2005-06	13113	[illegible]	1914	5164	[illegible]	1	11757	735	4657	47248
	2006-07	12987	10532	[illegible]	[illegible]	[illegible]	661	14166	886	4942	53414
	2007-08	12794	10815	[illegible]	[illegible]	[illegible]	82	18049	1128	10988	57154
Ennore	2004-05	104	520	[illegible]						0	9480
	2005-06	244	537	8387						0	9168
	2006-07	188	1724	8802						0	10714
	2007-08	319	2190	9051						3	[illegible]
Tuticorin	[illegible]	743	42	5374	1227	1241	130	3205	307	3849	15811
	[illegible]	774		6146	1094	1651	61	[illegible]	321	3985	17139
	[illegible]	738		5608	1306	1503	200	4011	377	4635	[illegible]
	2007-08	460		6112		1730	298	5630	450	[illegible]	21480
Cochin	[illegible]	10277		210		566		2323	185	727	14103
	2005-06	9641		199		727		[illegible]	203	833	13888
	2006-07	10476		219	0	640	176	[illegible]	227	797	15257
	2007-08	11299		246		354		[illegible]	254	672	15810
New Mangalore	2004-05	21434	10275		315	569	10	[illegible]	9	1152	33891
	2005-06	22392	9307		513	[illegible]	7	[illegible]	10	1194	[illegible]
	2006-07	21868	[illegible]	0	1047	[illegible]	88	[illegible]	17	1268	32042
	2007-08	21781	9266		[illegible]	[illegible]	56	[illegible]	21	2066	36019
Mormugao	2004-05	1010	[illegible]	[illegible]	[illegible]	579		[illegible]	10	503	30659
	2005-06	833	[illegible]	[illegible]	3747	605		130	9	681	31688
	2006-07	786	[illegible]	[illegible]	4734	620		[illegible]	[illegible]	885	34241
	2007-08	874	27329	357	3887	192		[illegible]	14	2354	35128
J. L. Nehru	2004-05	2460				37		28747	[illegible]	1564	32808
	2005-06	2545				[illegible]		33777	[illegible]	1481	37836
	2006-07	2625				[illegible]		40810	[illegible]	1350	[illegible]
	2007-08	2188						51923	4060	1727	55838
Mumbai	2004-05	19396				574	224	2571	219	12422	35187
	2005-06	27781		1844		595	98	2145	156	11727	[illegible]
	2006-07	32171		2533		473	308	1580	138	15299	52364
	2007-08	37074		2951		310	41	1632	118	15030	57038
Kandla	2004-05	22120	0	0	229	3119	2535	2754	181	10794	[illegible]
	2005-06	24297	2	0	434	4137	1379	2311	149	13347	45907
	2006-07	29711	234	293	411	3993	2024	2778	178	13538	52982
	2007-08	38177	419	935	244	4076	1373	2639	167	17030	64893
All Ports	2004-05	126441	[illegible]	33323	27324	14515	3838	54791	4235	[illegible]	383755
	2005-06	142094	79217	[illegible]	31282	17300	2133	62009	4613	51988	423568
	2006-07	[illegible]	80585	37307	37345	[illegible]	4481	73437	5541	57159	463782
	2007-08	168897	91974	39580	25145	16664	2903	92134	6712	81943	519240

Note: Figures for 2007-08 are provisional. $ Includes Liquid Fertilizer Raw Material(FRM) except for 2007-08
Other Coal includes all coals & Coke other than Thermal Coal except for 2007-08. Data for 2007-08 is only for 'Coking Coal' Source: Major Ports/ IPA

Annex 4

Commodity Composition of Traffic Handled at Non- Major Ports

(000 Tons)

Maritime States / UTs	Period	POL	Iron Ore	Building Material	Coal	Fertiliser & FRM*	Others	Total
Gujarat	2003-04	47936	4232	11225	6330	1389	10867	87332
	2004-05	36479	4062	11612	9908	2242	12817	87128
	2005-06	65149	5191	11090	10541	3630	17568	102075
	2006-07	71880	5704	11205	11248	4185	24215	133442
	2007-08	84175	6075	5628	12578	4629	25915	147289
Maharashtra	2003-04	185	4573	1334	2511	117	1212	10332
	2004-05	370	6471	1286	3552	184	1250	12113
	2005-06	230	4047	1405	2550	38	5866	11104
	2006-07	584	4502	1862	2763	704	1509	11508
	2007-08	386	4268	2304	2278	444	2117	11556
Andhra pradesh	2003-04	8488	38	469	22	1121	1267	10221
	2004-05	9956	867	910	-	1833	1541	15057
	2005-06	8507	3878	410	138	1827	3658	18427
	2006-07	8518	3903	54	138	1855	4030	18500
	2007-08	9174	3582	72	49	1937	4279	19253
Goa	2003-04	-	8007	-	416	-	11	8438
	2004-05	-	8180	-		-	264	8457
	2005-06	-	11428	-	325	-	1	11752
	2006-07	-	13528	-	279	-	631	14838
	2007-08		12623	-	88	-	118	12825
Tamil Nadu	2003-04	608	-	2	-	34	16	660
	2004-05	755	-	16	-	63	28	854
	2005-06	622	-	-	-	56	63	711
	2006-07	612	-	6	-	94	31	742
	2007-08	737	-	-	5	86	21	850
Karnataka	2003-04	164	492	6	-	25	488	1165
	2004-05	165	2734	-	-	15	863	3505
	2005-06	86	3358	9	4	80	576	4113
	2006-07	123	1675	-	2	79	441	2220
	2007-08	75	1650	-	-	62	732	2518
Others states / Uts #	2003-04	180	-	396	-	2	387	965
	2004-05	150	1	396	-	2	492	1045
	2005-06	146	-	485	-	17	527	1177
	2006-07	145	-	463	-	73	413	1064
	2007-08	172	-	1005	-	16	625	1728
All Major Ports	2003-04	57101	17840	13335	9857	3286	14062	118685
	2004-05	57785	21796	14122	13618	3808	17442	126803
	2005-06	65794	26840	13394	13568	5914	24232	155420
	2006-07	81970	29272	13580	14048	7548	35244	181112
	2007-08	94728	26703	12684	15287	7580	37896	195275

Note : All figures for 2006-07 & 2007-08 are provisional.
\# : Consists of Pondicherry, Kerala, Andaman & Nicobar Islands and Lakshadweep Islands.
No traffic was handled at ports of Orissa and Daman & Diu.
* : Includes liquid fertiliser raw material also.