

भारत के पत्तन क्षेत्र का अद्यतन

UPDATE ON INDIAN PORT SECTOR

(30.09.2013)



सत्यमेव जयते

परिवहन अनुसंधान प्रभाग

TRANSPORT RESEARCH WING

सडक परिवहन तथा राजमार्ग मंत्रालय

MINISTRY OF ROAD TRANSPORT & HIGHWAYS

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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 biannual publication "*Update on Indian Port Sector*". Present issue (upto September, 2013) is twenty-second in the series of the publication "*Update on Indian Port Sector*". The last issue contained data up to March, 2013.

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 September, 2013. 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.

(Dr.Vishwapati Trivedi)

December, 2013

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UPDATE ON INDIAN PORT SECTOR

(UP TO 30.09.2013)

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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 world economy slowed down in 2012 with GDP increasing by 2.2 per cent, down from 2.8 per cent in 2011. Growth in GDP decelerated in all three country groupings, namely to 1.2 per cent in developed countries, to 4.6 per cent in developing economies and to 3.0 per cent in economies in transition. For comparison, equivalent growth rates in 2011 were 1.5 per cent, 5.9 per cent and 4.5 per cent, respectively. While still growing at a reasonable rate, developing economies and the economies in transition are increasingly being affected by the problems in Europe and the fragile recovery in the United States. Spillover effects have filtered down through various channels, including through trade by depressing the demand for the exports of developing countries and the economies in transition. Countries such as the Russian Federation, Brazil and China are, in addition to falling export volumes, facing internal problems and some structural challenges.

1.1.2 Economic growth in China slowed from 9.3 per cent in 2011 to 7.8 per cent in 2012, the lowest rate in more than a decade. The deceleration is indicative of China's efforts to slow down the pace of its economic growth, mainly to reduce inflationary pressures. Growth in India and growth in newly industrialized economies such as the Republic of Korea also decelerated, owing to a large extent to a reduced European demand for these countries' exports. Economies in transition continued to grow in 2012, albeit at a moderate pace of 3 per cent. Strong energy prices supported growth in the energy-exporting economies of Kazakhstan and the Russian Federations. While the adverse effects of the crisis in Europe hampered economic expansion in countries and regions such as the Republic of Moldova, Ukraine and Eastern Europe. UNCTAD expects GDP growth to remain flat in 2013 with the global economy still struggling to return to a strong and sustained growth path. A number of factors are undermining a sustained global economic recovery, including the continued impacts of the financial and economic crises that started in 2008, as well as of the unsustainable financial processes and domestic and international imbalances that have led to the crises. In

several countries weaker growth may also be partly due to macroeconomic policy choices.

1.1.3 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	April- September	
					2012-13	2013-14
Trends in India's Select : Macro Parameters						
I. Total Cargo	14.3	4.2	3.2	2.2	1.7	6.6
(a) Major Ports	5.8	1.6	-1.7	-2.6	-3.3	2.4
(b) Non Major Ports	35.7	9.1	12.2	9.7	10.3	12.8
II.GDP overall	8.4	9.3	6.2	5.0	5.3	4.6
(a) Agriculture	1.0	7.9	3.6	1.9	2.3	3.6
(b) Industry	8.4	9.2	3.5	2.1	1.5	1.3
(c) Services	10.5	9.8	8.2	7.1	7.7	6.3
III. Foreign Trade						
(a) Export in \$ value	-3.5	40.5	21.8	-1.8	-6.2	5.14
(b) Import in \$ value	-5.0	28.2	32.3	0.32	-2.9	-1.8
Trends in Select : Global Indicators						
IV. World Output	-0.6	5.1	3.9	3.2	2.9F	3.6f
(a) Advanced Economies	-3.5	3	1.7	1.5	1.2F	2.0f
(b) Developing Economies	2.7	7.4	6.2	4.9	4.5F	5.1f
V. World Economic Growth	-2.2	4.1	2.8	2.2	2.1F	NA
(a) Advanced Economies	-3.8	2.6	1.5	1.2	1.0F	NA
(b) Developing Economies	2.4	7.9	5.9	4.6	4.7F	NA
(c) Transition Economies	-6.6	4.5	4.5	3.0	2.7F	NA
VI. World Trade Volume (Goods)	-11.7	14.1	6.5	2.5	2.7F	5.0f
VII. Export Volume growth (Goods)						
(a) Advanced Economies	-11.6	12.4	5.7	2.0	2.7F	4.7f
(b) Developing Economies	-8.0	14.0	6.8	4.2	3.5F	5.8f
VIII. Import Volume (Goods)						
(a) Advanced Economies	-12.1	11.7	4.7	1.0	1.5F	4.0f
(b) Developing Economies	-8.3	14.7	8.8	5.5	5.0F	5.9f
IX. World Seaborne Trade*	-5.0	7.4	4.3	4.4	NA	NA
(a) Goods Loaded	-4.5	7.0	4.5	4.3	NA	NA
(b) Goods Unloaded	-5.5	7.8	4.2	4.4	NA	NA
I. Based on data from Major Ports and Non Major Ports						
II. Based on gross domestic product (GDP) at Factor Cost (2004-05 Prices), Central Statistical Organization;						
III. Based on Department of Commerce, DGCi&S and RBI Bulletin						
IV, VI, VII & VIII Based on World Economic Outlook, October ,2013, IMF;						
V & IX. Based on Review of Maritime Transport, 2013, UNCTAD						
Note : MT: Million Tonnes; For item Nos IV, VI, VII & VIII year 2008-09 refers to calendar year 2008 and so on; F refers to forecast for 2013 and f refers to forecast for the year 2014;						
* growth in total goods loaded plus unloaded; NA : Not Available						

Selected Emerging Trends Affecting Seaborne Trade

1.1.4 Despite the positive growth in 2012, international seaborne trade remains vulnerable to many downside risks and exposed to some potentially game-changing trends that could redefine the maritime transport operating landscape. International shipping is facing a new and complex environment that involves both challenges and opportunities, including the demand and supply mismatch, continued global economic uncertainty and geopolitical tensions. Of all the prevailing challenges however, the interconnected issues of energy security and costs, climate change and environmental sustainability are perhaps the most unsettling. Climate change in particular continues to rank high on the international policy agenda, including of shipping and port business. With climate change effects already being felt globally and in the absence of adequate climate change mitigation and adaption action, shipping and ports and therefore international seaborne trade are likely to be severely affected by the potentially devastating impacts of this change (for example, extreme weather events and rising sea levels).

General Trends in Seaborne Trade

Table 2 : Developments in International Seaborne Trade (Million Tonnes)				
Year	Oil and gas	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	2836	2665	3664	9165
# iron ore, grain, coal, bauxite/alumina and phosphate . The data for 2006 onwards are based on various issues of the Dry Bulk Trade Outlook, produced by Clarkson Research Services. Source: Review of Maritime Transport,2013,UNCTAD				

1.1.5 Driven in particular by a rise in China's domestic demand as well as increased intra-Asian and South– South trade, international seaborne trade performed better than the world economy, with volumes increasing at an estimated 4.3 per cent in 2012, nearly the same rate as 2011. About 9.2 billion tonnes of goods were loaded in ports worldwide, with tanker trade (crude oil, petroleum products and gas) accounting for

less than one third of the total and dry cargo being responsible for the remaining lion's share. Strong growth (5.7 per cent) in dry-cargo shipments remained the mainstay of the expansion in 2012, driven in particular by continued rapid growth in dry bulk volumes. Fuelled by growing Asian demand for iron ore and coal and in line with the long-term trend, major dry-bulk shipments expanded at the rate of 7.2 per cent. China, which has contributed significantly to the growth of seaborne trade in recent years, continues to generate impressive import volumes. Although iron-ore import growth has moderated compared with high previous levels, coal has stepped in to fill the gap.

1.1.6 Reflecting to a large extent their increased participation in the world trading system, developing countries continued to contribute larger shares to international seaborne trade. In 2012, they accounted for 60 per cent of global goods loaded and 58 per cent of goods unloaded in 2012. However, while the group's share has been on the rise, contributions by individual countries have been uneven, reflecting their respective varying levels of integration into global trading networks and supply chains.

1.1.7 While, in line with previous trends, cargo volumes loaded in the ports of developing countries exceeded the volumes of goods unloaded, their shares have nevertheless evolved over the past four decades to reach near parity in 2012. Driven by the fast-growing import demand in developing regions – fuelled by their industrialization process and rapidly rising consumer demand – for the first time ever the share of goods unloaded in developing countries is likely soon to surpass their share of goods loaded.

Crude Oil and Petroleum products

1.1.8 Volumes of crude oil and refined petroleum products grew marginally at 1.5 per cent in 2012. Though the economic slowdown, high oil price levels and new technologies have dampened demand for crude oil, petroleum-product trade fared better in comparison.

1.1.9 Reflecting oil supply and demand dynamics, global crude-oil shipments grew by 1.3 per cent in 2012 with total volumes reaching 55.3 million bpd. Crude oil carried on board tankers accounted for two thirds of this total and increased by an estimated 1.5

per cent taking the total volume to 1.78 billion tonnes. Growth was particularly boosted by increased global production and inventory-building ahead of the embargo involving oil trade with the Islamic Republic of Iran.

1.1.10 In 2012, crude oil import volumes increased by 7.4 per cent in China and over 4.0 per cent in India (British Petroleum, 2013). As these countries continue to build local refineries, their crude oil imports will also increase, including from sources in West Africa and Latin America. This trend is likely to alter the direction of cargo flows, raise demand for tankers and increase tonne–miles. However, a potentially offsetting pattern is that a growing proportion of imports into China are likely to be delivered through pipelines from Kazakhstan, the Russian Federation and Myanmar. New trading lanes both for refined petroleum products and crude oil are emerging in tandem with changes in production, volume and structure of demand as well as the location of global refineries.

Dry-cargo Bulks:

1.1.11 Despite the weakness of the global economy, dry cargo trade volumes continued to grow at a healthy rate of 5.7 per cent in 2012, taking total volumes above the 6 billion tonnes mark. The volume of dry-bulk cargo including the five major bulk commodities (iron ore, coal, grain, bauxite/alumina and phosphate rock) and minor bulks(agri bulks, fertilizers, metals, minerals, steel and forest products) increased by 6.7 per cent in 2012 (Clarkson Research Services, 2013). A breakdown of this total indicates that much of the growth was generated by the expansion in the five major bulk commodities (7.2 per cent) and to a lesser extent by growth in the minor bulks (4.6 per cent), which in volume terms have added nearly 500 million tonnes to world seaborne trade between 2002 and 2012 (Clarkson Research Services, 2013). During the year the five major bulk commodities totalled about 2.7 billion Tonnes while the volume of minor dry bulks reached 1.4 billion tonnes. Together, major and minor dry bulks accounted for nearly two thirds of global dry-cargo volumes. The main caution, however, to growth in dry-bulk trade is the continued high dependence on the Asian demand and on only two key commodities, namely iron ore and coal.

Coal

1.1.12 Coal is the fastest-growing fossil fuel, accounting for 30 per cent of global primary energy consumption in 2012. Driven by non-OECD countries, global consumption expanded by 2.5 per cent in 2012 while production increased by 2 per cent (British Petroleum, 2013). During the year, the total volume of coal shipments (thermal and coking) increased at an annual rate of 12.3 per cent and surpassed the 1.06 billion tonnes mark for the first time. Thermal-coal trade, which accounted for 78 per cent of the total, increased at a strong rate of 14.2 per cent in 2012.

1.1.13 Coking-coal trade grew 5.4 per cent in 2012 driven by increases in import volumes of 43.7 per cent and 8 per cent in China and India, respectively. Elsewhere, imports into Europe and the Republic of Korea were constrained by limited growth in steel production.

1.1.14 Coal trade is set to grow in tandem with growing import demand from China and as Indian installations of coal-fired power stations expand. However, growing environmental regulation, including in Europe, together with the upside potential of China given its large domestic coal resources, may have an offsetting effect and result in a much moderated growth.

1.1.15 In a separate development, it should be noted that new coal power plants are expected to come on stream between 2012 and 2020 in Europe. These plants should reach a capacity nearly double the existing capacity during the preceding eight-year period and result in approximately 80 power plant units being newly built or replaced (Research and Markets, 2012). These developments are likely to affect demand for coal and further shape the flows and patterns of coal trade.

Iron ore shipments and steel production and consumption

1.1.16 As iron ore is a key ingredient used in steel production, its trade is largely determined by developments in the steel sector. According to data from the World Steel Association, global apparent steel use and steel production each increased by 1.2 per cent during 2012 (World Steel Association, 2013). China continued to increase

its production with its market share rising from 45.4 per cent in 2011 to 46.3 per cent in 2012. Against this background, iron-ore trade expanded by 5.4 per cent in 2012, taking the total volumes to 1.11 billion tonnes. Major iron-ore exporters were Australia, Brazil, Canada, India, South Africa and Sweden. Together, Australia and Brazil account for 73.5 per cent of global exports. Australia, the largest world exporter (44.5 per cent share), increased its shipments by 12.8 per cent. Similarly, other exporters such as Canada, South Africa and Sweden have also increased their shipments, while in India, mining bans and taxes on iron-ore exports have significantly constrained the country's export volumes (-52.8 per cent). As a result, India's market share declined and a structural shift unfolded, whereby India has moved from being a major exporter to a net importer and its import demand is likely to increase over the next few years.

Dry cargo: Minor bulks

1.1.17 In 2012, minor-bulks trade increased at a slower annual rate than in the previous year, growing by 4.6 per cent and taking the total volumes to 1.4 billion tonnes. Metals and minerals accounted for 45.6 per cent of this total followed by manufactures (33.0 per cent) and agribulks (21.3 per cent). The largest growth was recorded in the metals and minerals segment (for example, cement, nickel ore, anthracite) with volumes growing by 6.0 per cent year-on-year. The next largest contributor to growth was the manufactures sector (for example, steel and forest products) with 3.6 per cent annual growth. Recently, trade patterns have been shifting in the manufactures sector owing to the surge in Chinese exports with flows destined mainly for other Asian countries, Africa and developing America. Ample supply of the more affordable Chinese steel, supported by a strong global demand, has boosted trade in steel products. Finally, agribulks (soymeal, oilseed/meal and rice) also expanded at 3.5 per cent, despite a drop in sugar and potash volume.

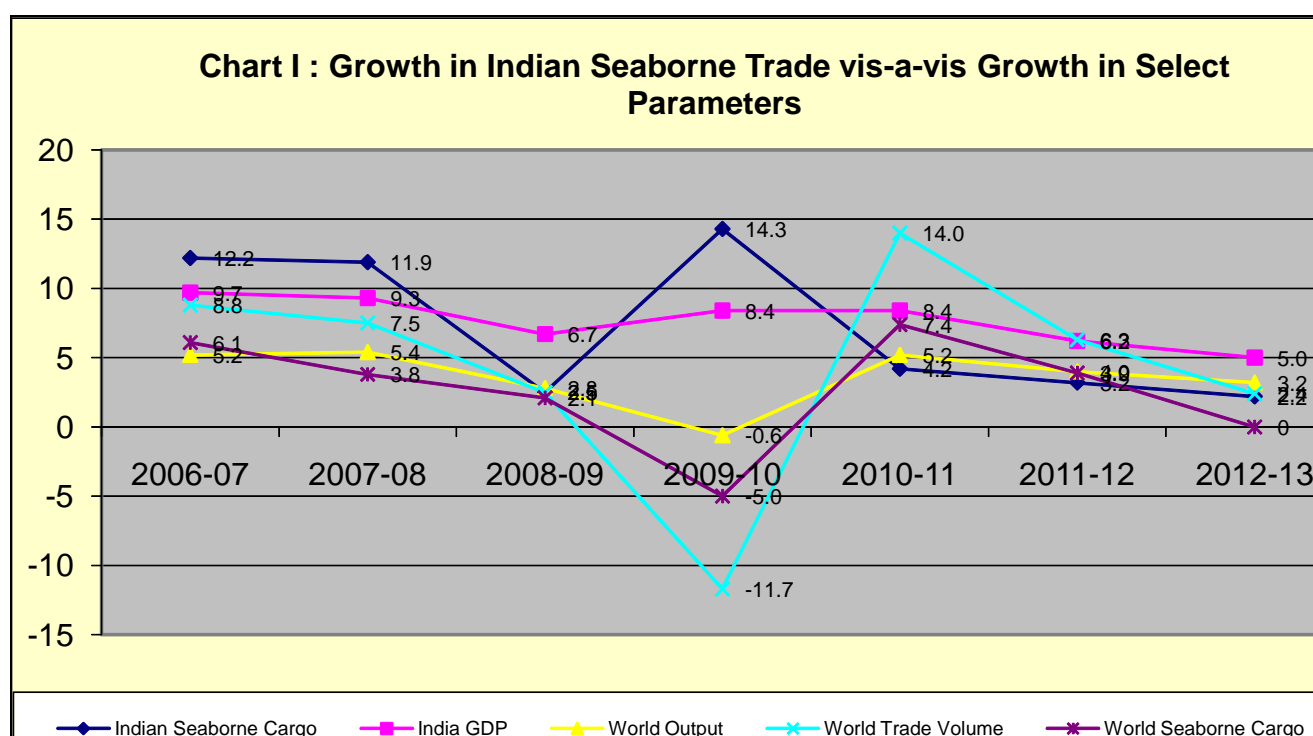
Other dry cargo: Containerized trade

1.1.18 For many decades, containerized trade has been the fastest-growing market segment accounting for over 16 per cent of global seaborne trade by volume in 2012 and more than half by value (in 2007). Containerized trade, which accounted for 65 per cent of "other dry cargo" in 2012 (that is, nearly two thirds of the 2.28 billion

tonnes of dry cargo that remain after removing dry-bulk commodities), increased by 3.2 per cent in 2012, down from 13.1 per cent in 2010 and 7.1 per cent in 2011. The sharp deceleration resulted from the depressed volumes on the main lane East–West trade, in particular, the Asia–Europe trade route.

1.2 Cargo Traffic at Indian Ports

1.2.1 During the first half (April–September) of 2013-14 major and non major ports in India accomplished a total cargo throughput of 485.9 million tonnes reflecting an increase of only 6.6% over the same period last year (**Table: 3**). Non-major port's growth increased to 12.8% in the first half of 2013-14 compared to 10.3% in the corresponding period of 2012-13. The growth in India's GDP, Port traffic and growth in world output, world export volume and world seaborne trade (loadings and unloading) since 2006-07 is given in **Chart-I**



Source: Growth rates for India's GDP and Cargo Traffic are based on statistics released by Central Statistical Organization and data available with Transport Research Wing of M/o Shipping, Road Transport & Highways and pertain to fiscal year. Growth rates in the World Output and World Trade Volume refer to calendar years (2006-07 refers to 2006 and so on) based on (World Economic Outlook, October 2013, IMF)

Table 3: Traffic Handled at Indian Ports								
Major/Non-	Traffic Handled (Thousand Tonnes)				Growth over previous year/period (percentage)			
Major Ports	2011-12	2012-13	April-September		2011-12	2012-13	April-September	
			2012-13(P)	2013-14(P)			2012-13	2013-14
Major Ports	560187 (61.3)	545790 (58.4)	270449 (59.4)	276861 (57.0)	1.7	2.6	3.4	2.4
Non-Major Ports	353745 (38.7)	388225 (41.6)	185206 (40.6)	208996 (43.0)	12.2	9.7	10.3	12.8
All Ports	913932 (100.0)	934015 (100.0)	455655 (100.0)	485857 (100.0)	3.2	2.2	1.7	6.6
Figures in bracket represent percentage share in the total traffic handled by All-ports. (P) Provisional								

1.3 Cargo Traffic at Major Ports

1.3.1 Cargo traffic at India's 12 major ports during April-September, 2013, at 276.86 million tonnes increased by 2.4% compared to 270.45 million tonnes handled during April-September, 2012. During first Six months of 2013-14, Ennore port recorded highest growth in traffic (58.5%) followed by Paradip (33.1%), NMPT (15.8%), Cochin Port (7.0%), HDC (5.9%), and KDS (3.%) over April-September 2012-13. The growth in traffic for the other ports during the same period was, however, marginal viz. Kandla (3.3%) and Tuticorin (0.4%) over April-September 2012-13. Major ports which recorded a negative growth in traffic during April-September 2013 were: Mormugao (59.3%) followed by JNPT (5.3%), Vishakhapatnam (4.5%), Mumbai (4.2%) and Chennai Port (3.2%).

Amongst the Major Ports, Kandla Port handled the maximum Cargo of 45.95 million tonnes during April – Sept., 2013 with a share of 16.6% in the total cargo handled during the period, followed by Paradip (12.3%), JNPT (11.2%), Vishakhapatnam (10.5%), Mumbai (10.0%), Chennai (9.5%), NMPT (7.0%), HDC (5.4%), Tuticorin (5.1%), EPL (4.6%), Cochin (3.9%), KDS (2.2%) and Mormugao (1.9%).

Port wise traffic handled during 2011-12, 2012-13 and first half of 2012-13 and 2013-14 is given in **Table: 4**.

Table 4 : Traffic Handled at Major Ports (Thousand Tonnes)					
Ports	2011-12	2012-13(P)	April-September		
			2012-13(P)	2013-14(P)	% Change over CP
Kolkata	43248	39928	19808	20944	5.7
Kolkata DS	12233	11844	5830	6059	3.9
Haldia DC	31015	28084	14053	14885	5.9
Paradip	54254	56552	25629	34119	33.1
Vizag	67420	59040	30309	28936	-4.5
Ennore	14956	17885	7997	12676	58.5
Chennai	55707	53404	27127	26249	-3.2
Tuticorin	28105	28260	14037	14093	0.4
Cochin	20090	19845	10134	10847	7.0
New Mangalore	32941	37036	16736	19376	15.8
Mormugao	39049	17693	12663	5159	-59.3
Mumbai	56186	58038	28788	27581	-4.2
JNPT	65730	64490	32652	30930	-5.3
Kandla	82501	93619	44494	45951	3.3
All Ports	560187	545790	270449	276861	2.4

Source : IPA

(P): Provisional

Commodity wise Cargo Traffic at Major Ports

1.3.2 At a broad commodity level during first six months of 2013-14, Coal, POL, and Other Cargo posted growth of 29.0%, 4.0% and 2.1% respectively (**Table-5**). The traffic in Iron ore, Fertilizers & FRM and Container was affected during April-September, 2013 recording a negative growth of 34.1%, 12.1% and 5.0% respectively.

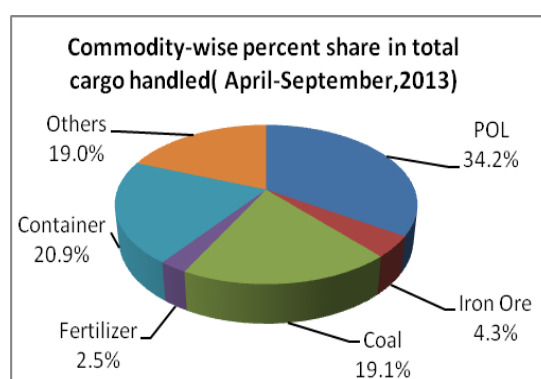
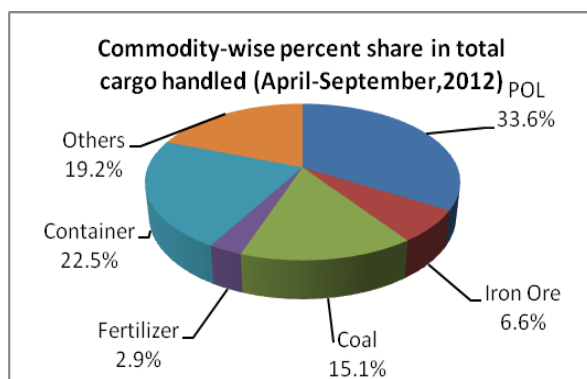
In the liquid bulk category, crude and petroleum cargo improved by 4.0 % during April-September, 2013 compared to 0.4% increase in the same period of last year. Growth in Coal traffic has shown sharp growth of 29.8% during April-September 2013 as against 3.8% during April-September 2012.

In terms of composition of cargo traffic handled at major ports during April – Sept., 2013, the largest commodity group (with share in percent in total cargo handled) was POL (34.1%) followed by Container traffic (20.9%), Coal (19.0%), Other cargo (19.2%), Iron Ore (4.3%) and Fertilizer & FRM (2.5%).

Table 5 : Commodity-wise Traffic Handled at Major Ports (Thousand Tonnes)

Commodity	2011-12	2012-13(P)	April-September		
			2012-13	2013-14	% Change over CP
POL	173851	185270	90875	94502	4.0
Iron Ore	60719	27370	17969	11844	-34.1
Fertiliser	20404	14739	7924	6967	-12.1
a. Finished	12222	7441	4216	3475	-17.6
b. Raw	8182	7298	3708	3492	-5.8
Coal	78776	86978	40786	52595	29.0
a. Thermal Coal	51128	58653	26662	36481	36.8
b. Coking Coal	27648	28325	14124	16114	14.1
Others	106161	111612	52016	53120	2.1
Total	560187	545790	270449	276861	2.4
(P) : Provisional; CP : Corresponding period-April-September 2012-13					

The shares of different commodity groups in total cargo traffic during first half of 2012-13 and 2013-14 at India's major ports is depicted in **Charts II and III**.



POL: Petroleum, Oil & Lubricants

1.3.4 The Port-wise & Commodity-wise traffic handled at major ports during the years 2011-12 and 2012-13 and the first six months of 2012-13 and 2013-14 are given in **Annexure - II**.

Container Traffic

Table 6: Container Traffic at Major Ports (in Thousand tonnes/TEUs)

PORT	2011-12		2012-13		April-September				% Change over CP			
	Tn	TEU	Tn	TEU	2012-13		2013-14		April- Sep. 2012-13		April- Sep. 2013-14	
					Tn	TEU	Tn	TEU	Tn	TEU	Tn	TEU
Kolkata	6818	317	6960	463	3482	230	3726	238	5.2	14.4	7.0	3.5
Haldia	2619	115	2869	137	1363	75	1129	60	13.5	8.7	-17.2	-20.0
Paradip	109	8	171	13	91	7	28	3	133.3	133.3	-69.2	-57.1
Visakhapatnam	4213	234	4554	247	2363	130	2533	131	24.3	22.6	7.2	0.8
Chennai	30076	1555	29708	1539	15515	804	14602	757	1.2	1.3	-5.9	-5.8
Ennore	0	0	0	0	0	0	0	0	-	-	0.0	0.0
Tuticorin	9227	477	9373	476	4546	240	5044	252	3.1	0.0	11.0	5.0
Cochin	4715	337	4607	335	2435	177	2456	178	-6.1	-3.8	0.9	0.6
New Mangalore	645	45	692	48	347	25	367	25	4.2	4.2	5.8	0.0
Mormugao	279	22	213	20	90	9	112	10	-13.5	0.0	24.4	11.1
J. L. Nehru	58233	4317	57912	4259	29329	2155	27169	2061	3.0	0.2	-7.4	-4.4
Mumbai	551	56	828	58	404	30	215	19	23.2	-3.2	-46.8	-36.7
Kandla	2791	168	1934	118	914	58	452	29	-30.9	-28.4	-50.5	-50.0
All Ports	120276	7651	119821	7713	60879	3940	57833	3763	2.6	1.2	-5.0	-4.5

Note: CP - Corresponding period of previous year. (P) Provisional; Tn: tonnes; TEU –twenty foot equivalent units

1.3.5 Total Container traffic at major ports has declined both in terms of tonnes and twenty foot equivalent units [TEUs] by 5.0 % and 4.5 % respectively during the first six months (April-September, 2013-14) of the current financial year. Jawahar Lal Nehru Port continues to be the leading container handling port in the country with a share of more than 47% in terms of tonnage and more than 55% in terms of TEUs in the total container traffic at major ports during the period under reference above.(**Table:6**). Efficiency in container handling operations at some of the select container terminals in India is given in **Table: 7**.

Table 7: Performance Indicators of Select Container Terminals

Terminal	Year	Moves /	Moves /	TEU /Mtr.	TEU /	Dwell	TRT
		Crane Hr.	Berth Hr.	Quay	Employee	Time(Day)	Day
1	2	3	4	5	6	7	8
Tuticorin	2010-11	23	42	1204	3042	2.4	1.16
	2011-12	22	43	606	1544	2.7	1.2
	2012-13	22	45	644	1730	1.4	1.1
Chennai - CCTPL	2010-11	26	51	1303	2744	2.7	1.3
	2011-12	21	38	620	1382	3.4	1.7
	2012-13	23	46	556	1240	2.5	1.4
Chennai - CITPL	2010-11	32	28	441	3426	3.5	4.5
	2011-12	30	42	294	1254	3.5	0.04
	2012-13	30	33	373	1592	3.5	0.04
JNPT - JNPCT	2010-11						
	2011-12	14.8	36.2	12.6	0	4.8	1.94
	2012-13	15.8	46.6	17.6	0	4.3	2.3
JNPT - NSICT	2010-11	NA	NA	NA	NA	NA	NA
	2011-12	21.9	74.0	1223	NA	3	NA
	2012-13	22.6	73.7	911	NA	3.4	NA
JNPT - GTICT	2010-11	NA	NA	NA	NA	NA	NA
	2011-12	31.83	96.8	1329	1775	2.9	NA
	2012-13	30.3	102.8	1385	1933	3.2	NA
Cochin	2010-11						
	2011-12	26.5	54.1	304	118	11.0	13.8
	2012-13	25.6	48.44	292	102	7.0	12.5
Kolkata DS	2010-11	29.5	17.1@	NA	NA	6.0\$	4.45
	2011-12	NA	NA	NA	NA	NA	NA
	2012-13	NA	NA	NA	NA	NA	NA
Visakhapatnam	2010-11	22	30.1	324	866	4.8	0.76
	2011-12	NA	NA	NA	NA	NA	NA
	2012-13	NA	NA	NA	NA	NA	NA

#: Per effective crane hour; \$: Import *: Average for CFS containers;

@: Starting times and finishing times have been considered as vessels sometimes have to wait at berth after completion of work due to non-availability of suitable tide in the river.

Moves /Crane Hour(Hr): Total container vessel moves/sum of gross craned Hours

Moves/Berth Hr: Total container vessel moves/sum of gross vessel working hours

TEU/Mtr. Quay: Total TEUs handled per annum / total quay length in meter

Dwell time: Total No. of container storage days/total no. containers

JNPCT: Jawaharlal Nehru Port Container Terminal NSICT: Nhava Sheva International Container Terminal

GTICT: Gateway Terminals India Container Terminal; TRT:Turn Around Time

CCTPL: Chennai Container Terminal Pvt. Ltd. CITPL: Chennai International Terminal Private Limited.

1.4 Cargo Traffic at Non - major Ports

1.4.1 Non-Major Ports handled more than 40% of total maritime freight traffic of the country during the first half of the current fiscal year.

1.4.2 **Table 8** presents maritime state-wise share and growth of traffic handled at Non-major ports during last two years and the first six months of the current and previous year.

Table 8 : Traffic Handled by Non-Major Ports by Maritime States/UTs								
Maritime State/UT	Traffic Handled ('000 Tonnes)				% Change over Previous Year			
	2011-12	2012-13	April-September		2011-12	2012-13	April-September	
			2012-13	2013-14			2012-13	2013-14
Gujarat	259050 (73.22)	287817 (74.14)	135969 (73.42)	152606 (73.02)	12.2	11.1	7.2	12.2
Maharashtra	19947 (5.64)	24198 (6.23)	11136 (6.01)	11284 (5.40)	34.1	21.3	37.9	1.3
Andhra Pradesh	45633 (12.90)	51828 (13.35)	24905 (13.45)	30513 (14.60)	5.5	13.6	15.9	22.5
Goa	14470 (4.09)	3389 (0.87)	3217 (1.74)	3331 (1.59)	-0.8	-76.6	-38.5	3.5
Tamil Nadu	1210 (0.34)	933 (0.24)	474 (0.26)	406 (0.19)	-24.9	-22.9	-28.0	-14.3
Karnataka	592 (0.17)	606 (0.16)	279 (0.15)	206 (0.10)	-80.9	2.4	13.9	-26.2
Other States/UTs	12843 (3.63)	19454 (5.01)	9226 (4.98)	10650 (5.10)	82.9	51.5	70.6	15.4
All M.States/UTs	353745 (100)	388225 (100)	185206 (100)	208996 (100)	12.2	9.7	10.3	12.80
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								

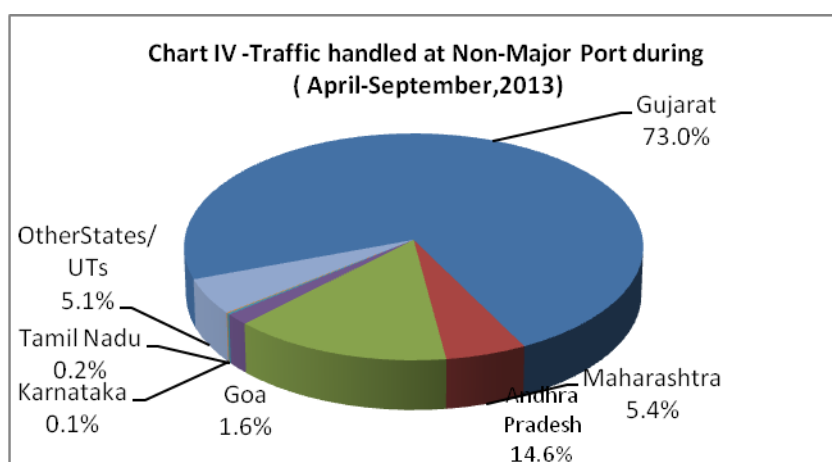
1.4.3 The growth in cargo handled by non-major ports during the first half of 2013-14 was 12.8% compared to 10.3 % in the first half of 2012-13 (**Table:8**). The growth in cargo handled at non-major ports has been facilitated by sustained growth in non-major ports located in Andhra Pradesh and Gujarat aided by substantial increase in the cargo traffic of Coal and Building Material in particular (**Tables 8 & 9**). 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 of India's maritime states and Table 9 gives a glimpse of commodity profile of the cargo handled by these ports. **Table: 8** reflects that Gujarat accounted for about three-fourth

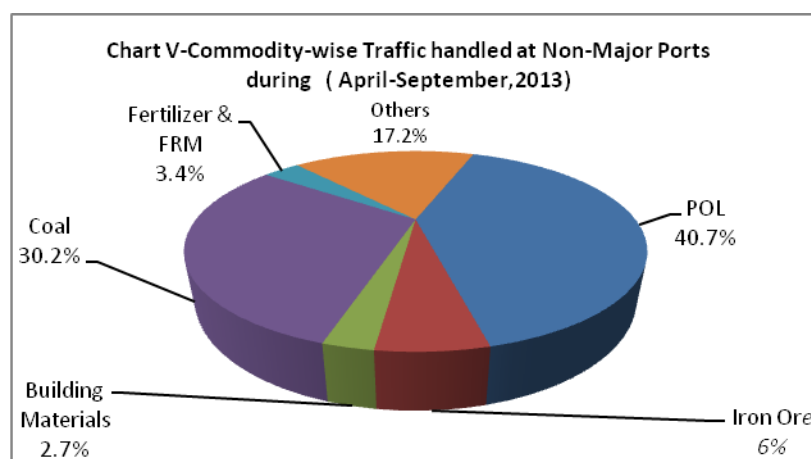
of the total traffic handled by the non-major ports followed by Andhra Pradesh (15%), Maharashtra (5%) and Goa (2%) during April –September 2013. Four maritime States, viz, Gujarat, Maharashtra, Goa, and Andhra Pradesh together accounted for close to 95% of the total cargo traffic handled by the non-major ports in the first half of the current year.

1.4.4 Two commodities, viz. POL, and Coal accounted for about three-fourth of the total cargo handled at the Non- major ports during April – September,2012.(Table :9).

Table 9 : Commodity-wise Traffic Handled by Non-Major Ports								
Commodity Group GROUP	Traffic Handled ('000 Tonnes)				% Change over Previous Period			
	2011-12	2012-13	April-September(P)		2011-12	2012-13	April-September	
			2012-13	2013-14			2012-13	2013-14
POL	156322 (44.19)	167967 (43.27)	83986 (45.35)	84988 (40.66)	7.5	7.4	8.2	1.2
Iron Ore	30616 (8.65)	21937 (5.65)	11731 (6.33)	12227 (5.85)	-20.0	-28.4	-15.1	4.2
Building Materials	12866 (3.64)	17491 (4.51)	2938 (1.59)	5662 (2.71)	4.4	35.9	-70.5	92.7
Coal	79040 (22.34)	110638 (28.50)	48578 (26.23)	63153 (30.22)	35.2	40.0	30.1	30.0
Fertilizer & FRM	15742 (4.45)	11210 (2.89)	6221 (3.36)	7019 (3.36)	23.7	-28.8	-26.4	12.8
Others	59159 (16.72)	58982 (15.19)	31752 (17.14)	35947 (17.20)	22.7	-0.3	53.1	13.2
All	353745 (100)	388225 (100)	185206 (100)	208996 (100)	12.2	9.7	10.3	12.8

Note: Figure in parenthesis is the percentage share of major commodity groups in the total traffic handled by the Non major ports. For Andhra Pradesh, Commodity-wise traffic handled during April-September 2013-14 has been estimates on the basis of commodity-wise traffic handled during corresponding period 2012-13. P- Provisional





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

1.4.5 The share of Maritime States/UTs in the total traffic handled by Non-major ports and Commodity-wise composition of traffic for the same is revealed in the pie **Charts IV and V** respectively.

1.4.6 Maritime State-wise & commodity-wise traffic handled at non-major ports during the last two years and the first six months of the current financial year is given in **Annexure - III**.

1.5 Impact of Global Macro Developments on Maritime Trade

1.5.1 Impact of growth on India's seaborne cargo

1.5.1.1 Maritime Transport activity is driven by developments in the world economy viz. growth in world output & trade as well as in Indian economy (coastal trade). 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 2012-13, the GDP growth slowed down to 5.0% from 6.2% in 2011-12. In the first six months of 2013-14, the GDP has seen downward trend in growth to 4.6%. However, Cargo traffic at India's 12 major ports (which accounts for about 60.0% of India's total seaborne cargo) at 546 million tonnes showed a decline of 2.6% over the previous year. In first six months of 2013-14, the cargo traffic at major ports has shown an increase of 2.4% from 270.5 million tonnes in 2012-13 to 276.9 million tonnes. 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 GDP growth

trajectories. This reveals that growth in total cargo throughput at Major Ports remained subdued in Q3 and Q4 of 2012-13 and Q1 of 2013-14. The growth in cargo traffic however increased to 5.8% in Q2 of 2013-14. The manufacturing sector which is a major factor influencing seaborne cargo traffic continued to record low GDP growth (-0.1%) in first half of 2013-14 which was (-0.5%) in first half of 2012-13. The GDP of Industry sector comprising of Mining & Quarrying; manufacturing; electricity, gas and water supply and construction activities recorded quarterly growth of 0.2% in Q1, 2.4% in Q2 in 2013-14 as against 1.8% in Q1 and 1.3% in Q2 of 2012-13. While trends in POL, coal and fertilizers are largely driven by the dynamics of domestic demand supply; those of iron ore, container traffic, "others" in particular are largely shaped by the state of global demand and economic activity and government policies. Coal recorded an increase of 33.1% in Q1 and 26.3% in Q2 of 2013-14. Iron ore cargo traffic posted sharp decline 61.5% in Q1 of 2013-14 mainly due to ban of iron ore mining in Goa and restriction on mining in the state of Karnataka. Iron Ore Cargo traffic however increased by 36.5% in Q2 of 2013-14. Other commodity groups recorded meager to modest growth.

1.5.1.2 **Table 10** gives Quarter wise trend in growth of cargo traffic handled at Major ports, GDP and GDP of Manufacturing sector during 2012-13 and first half of 2013-14.

Table 10 : Quarter wise Trend in Growth of Cargo Traffic at Major Ports & GDP							
Commodities/ Year	2012-13				2013-14		
	Q1	Q2	Q3	Q4	Q1	Q2	Half-yearly Growth
POL	-5.1	6.6	12.3	13.9	5.1	3.0	4.0
Iron Ore	-33.4	-59.0	-76.4	-56.7	-61.5	36.5	-34.2
Coal	1.0	7.0	16.0	17.8	33.1	26.3	29.8
Fertilizer	-26.8	11.5	-40.0	-49.2	15.4	-25.7	-11.9
Container (in tonnes)	2.3	3.1	-7.4	0.7	-6.6	-3.5	-5.0
TEUs	-0.2	2.7	-5.9	7.1	-4.4	-4.7	-4.5
Other cargo	3.3	1.7	24.6	-4.8	-3.4	6.2	1.3
All Cargo	-5.5	-0.9	-2.7	-1.0	-1.0	5.8	2.3
GDP overall	5.4	5.2	4.7	4.8	4.4	4.8	4.6
GDP -Manufacturing	-1.0	0.1	2.5	2.6	-1.2	1.0	-0.1
GDP: Gross Domestic Product at factor cost at 2004-05 prices.							

1.5.2 Global Ocean Freight Rates

Freight Rates

1.5.2.1 There are countless factors affecting supply and demand of maritime transport services and thus freight rates. Factors such as a slowdown in international trade, sanctions, natural disasters and weather events, regulatory measures and changes in fuel prices have an impact on the world economy and global demand for seaborne transport. In 2012, the maritime sector continued to experience low and volatile freight rates in its various segments because of surplus capacity in the global fleet generated by the severe downturn in trade in the wake of the 2008 economic and financial crisis. The steady delivery of new build vessels into an already oversupplied market, coupled with a weak economy, has kept rates under heavy pressure.

Container freight rates

1.5.2.2 In 2012, shrinking cargo volumes, mainly on the main East–West containerized trade routes, combined with an oversupply of tonnage, in particular of large container ships, inevitably led to volatile container freight rates and a weaker market in general, while charter rates remained on the decline.

1.5.2.3 The overall low freight rates observed in 2012 reduced carriers' earnings close to, and even below operating costs, especially when bunker oil prices remained both high and volatile. In 2013, global container trade is projected to grow by 5 per cent, and global container supply, by 6 per cent. (Clarkson Research Services, 2013). During the first half of 2013, several attempts by carriers to increase rates were again applied to several trade lines as a result of General Rate Increases (GRIs). While GRIs are only temporary solutions to support comparative returns, achieving long-term market stability would enable shipping lines to deal with core market fundamentals and adjust capacity to demand. Another important action launched by the carriers in 2013 in the face of difficult circumstances is the operational alliance called the P3 Network, agreed by the world's three largest container shipping lines: Maersk Line, Mediterranean Shipping Company (MSC), and CMA CGM. The agreement, which will go into effect in the second quarter of 2014, would allow liners to control overcapacity

and reduce rates volatility. It would call for the three liners to pool vessels equivalent to 15 per cent of global capacity on three main lane trade routes (Asia–Europe, trans-Pacific and transatlantic), with an initial capacity of 255 vessels (or 2.6 million TEUs). The P3 East–West service network initiative is considered by some analysts as a positive development for the liner industry as a whole in the drive to reduce costs and stabilize the market.

1.5.2.4 In the near future, with world economies still under pressure, the sector is expected to continue facing the same weak demand volumes, especially in Europe, which would continue to have an impact on container freight rates, at least in 2013. In the medium term, however, supply growth is likely to slow down, owing to the fewer vessel orders placed and the difficulty associated with financing new vessel builds. These variations may reduce the gap of new surplus and low demand, which would lead to improved container freight rates (Clarkson Research Services, 2013).

Tanker freight rates

1.5.2.5 The tanker market, which encompasses the transportation of crude oil, refined petroleum products (clean and dirty products) and chemicals, witnessed an equally difficult market environment in 2012, perhaps slightly less volatile. The year saw ups and downs for the tanker industry; this volatility was felt across the board in many ship sizes and as a whole but perhaps slightly less so than in 2011. The average Baltic Exchange Dirty Tanker Index for the full year 2012 dropped to 719 (8 per cent less than the annual average of 2011), whereas the average Baltic Exchange Clean Tanker Index was below 700 (11 per cent less than the annual average of 2011). These trends are reflected in **Table 11**.

Table 11. Baltic Exchange Rate Index							
	2008	2009	2010	2011	2012	%age Change (2012/2011)	2013 (Estimate)
Dirty Tanker Index	1 510	581	896	782	719	-8	638
Clean Tanker Index	1155	485	732	721	641	-11	649

The sector was affected by a combination of factors leading to overall low freight rates: weak demand, slow imports growth, a change in the structure of tanker demand, new discoveries (e.g. the shale revolution in the United States), high oil prices, and high idle and tonnage capacity.

1.5.2.6 The overall decline in tanker freight rates has encouraged ship owners to reduce their operating costs considerably and in particular, bunker consumption. The trend of maximizing fleet efficiency, slow steaming, scrapping and idling some ships observed in 2011 also increased in 2012. In 2014 and 2015, tanker freight rates are expected to see some improvement as cargo demand and fleet supply become more balanced. However, in the long run, several factors, mainly relating to oil demand, production and industry developments, may influence the tanker market.

Dry bulk freight rates

1.5.2.7 Like other shipping markets, the dry bulk market, generally categorized either as major bulk (iron ore, coal, grain, bauxite/alumina and phosphate rock) or minor bulk (agricultural products, mineral cargoes, cement, forest products and steel products), has also suffered from the severe overcapacity and slow economy growth that have sustained low freight and charter rates (Clarkson Research Services, 2013; Barry Rogliano Salles, 2013; Danish Ship Finance, 2013). As a result, earnings in all fleet segments continued to fall.

1.5.3 Trends in Global Top 20 Cargo/Container Ports

1.5.3.1 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 increased by more than 5.4 % in 2012 as compared to 9.1% in 2011. Similarly, the growth in container traffic (million TEUs) which reflects growth in manufactured goods increased by 3.7 % in 2012 as compared to 8.0% in 2011.

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	2010	2011	2012
1	Ningbo & Zhoushan (PRC) ¹⁾	627.0	691.0	744.0
2	Shanghai (PRC) ²⁾	653.0	727.6	736.0
3	Singapore	503.3	531.2	538.0
4	Tianjin (PRC)	408.0	451.0	476.0
5	Rotterdam (Netherlands)	430.2	434.6	441.5
6	Guangzhou (PRC)	400.0	429.0	434.0
7	Qingdao (PRC)	350.1	375.0	402.0
8	Dalian (PRC)	300.8	338.0	373.0
9	Tangshan (PRC)	250.6	308.0	364.6
10	Yingkou (PRC)	225.0	261.0	301.1
11	Busan (South Korea) ³⁾	241.1	269.9	298.7
12	Rizhao (PRC)	221.0	252.6	281.0
13	Qinhuangdao (PRC)	257.0	287.0	271.5
14	Hong Kong ⁴⁾	267.8	277.4	269.3
15	Port Hedland (Australia)	177.5	197.7	260.1
16	Shenzhen (PRC)	221.0	223.0	228.1
17	Port Klang (Malaysia)	171.0	194.2	197.9
18	Los Angeles (USA)	204.8	203.9	193.1
19	Antwerp (Belgium)	178.2	187.2	184.1
20	Xiamen (China)	139.3	156.5	172.0
	Total of Top 20 Ports	6226.7	6795.8	7166.0
Source: Port Statistics, Port of Rotterdam Authority; PRC: Peoples Republic of China; : 1) Port combined in 2006, 2) Including domestic trade and river trade: 3) Converted from freight ton to metric ton; 4) Including river trade; China ports figures for 2012 are provisional				

Table 13 : Top 20 World Container Ports (in Million TEUs)				
S.No.	Port	2010	2011	2012
1	Shanghai (PRC) ¹⁾	29.07	31.74	32.53
2	Singapore	28.43	29.94	31.65
3	Hong Kong (PRC) ²⁾	23.70	24.22	23.12
4	Shenzhen (PRC)	22.51	22.57	22.94
5	Busan (Republic Korea)	14.19	16.19	17.04
6	Zhoushan/Ningbo ³⁾ (PRC)	13.14	14.69	16.83
7	Guangzhou(PRC)	12.55	14.40	14.74
8	Qingdao(PRC)	12.01	13.02	14.50
9	Dubai Ports (UAE)	11.60	13.00	13.28
11	Tianjin(PRC)	10.08	11.50	12.30
10	Rotterdam (Netherlands)	11.15	11.89	11.87
13	Port Klang (Malaysia)	8.87	9.60	10.00
12	Kaohsiung (Taiwan Province of PRC)	9.18	9.64	9.78
14	Hamburg (Germany)	7.90	9.01	8.86
15	Antwerpen (Belgium)	8.47	8.66	8.64
16	Los Angeles (USA)	7.83	7.94	8.08
17	Dalian(PRC)	5.24	6.40	8.06
18	Tanjung Pelepas (Malaysia)	6.53	7.50	7.70
19	Bremerhaven(Germany)	4.89	5.92	6.12
20	Long Beach (USA)	6.26	6.06	6.05
	Total of Top 20 Ports	253.60	273.89	284.09
Source: Port Statistics, Port of Rotterdam Authority;				
PRC: Peoples Republic of China;				
1) Including domestic trade: 2) including river trade: 3) Ports Combined in 2006				

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 1.9.2000. In order to attract private sector investment, model bid documents were finalized 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 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 beginning of the Eleventh Five Year Plan the capacity of the Major Ports was 504.75 million tonnes. At the end of March 2013, the cargo handling capacity of Major Ports was 744.91 million tonnes. Commodity-wise capacity of Major Ports at the end of March 2013 is given in **Annex IV(a&b)**.

Maritime Agenda 2010-20

1.6.5 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.

1.6.6 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.

1.6.7 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 – Mumbai (JNPT), Kochi, Chennai and Visakhapatnam.
- Port Policy Measures
 - Corporatization of Major Ports
 - New Land Policy for Major Ports
 - New Policy on captive berths
 - Establishing a Port Regulator for all ports for setting, monitoring and regulating service levels and technical & performance standards.
 - 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.

Private Sector Participation

1.6.8 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. It has been estimated in the Maritime Agenda 2010-20 that investments required in new projects of Major ports will be Rs.109449.41 crore, of which Rs.72878.16 crore have been estimated to come from Private sector participation and the balance Rs.36571.25 would be funded through Internal Resources/EBR and Government Budgetary support etc. The states have also identified projects for development of non-major ports at an estimated cost of Rs 167930.84 crore for creation of additional capacity of 1293.56 million tonnes. Private sector is envisaged to fund most of the projects through PPP or BOT or BOOT basis. It is envisaged that private sector will meet 96.1% of the cost of development amounting to Rs 161332.91 crore. Remaining requirement of Rs. 3678.34 crore is planned to be contributed by State Governments through Internal Resources / Gross budgetary Support/ Internal Extra budgetary Resources.

1.6.9 To encourage private sector participation uniformity, clarity and transparency in the bidding process is of the prime importance. The Department 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. In the financial year 2012-13, Twenty nine projects - Public Private Partnership (PPP) projects were awarded at an estimated cost of Rs. 13548.00 crore for capacity addition of 208 MT in the port sector comprising construction of berths and terminals, mechanization of existing berths etc. In the first six months of 2013-14, 4(Four) PPP projects were awarded for adding capacity of 40.79 MT at Major Ports. Investment of Rs 2094.65 crores is expected in these 4(four) projects.

1.6.10 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.

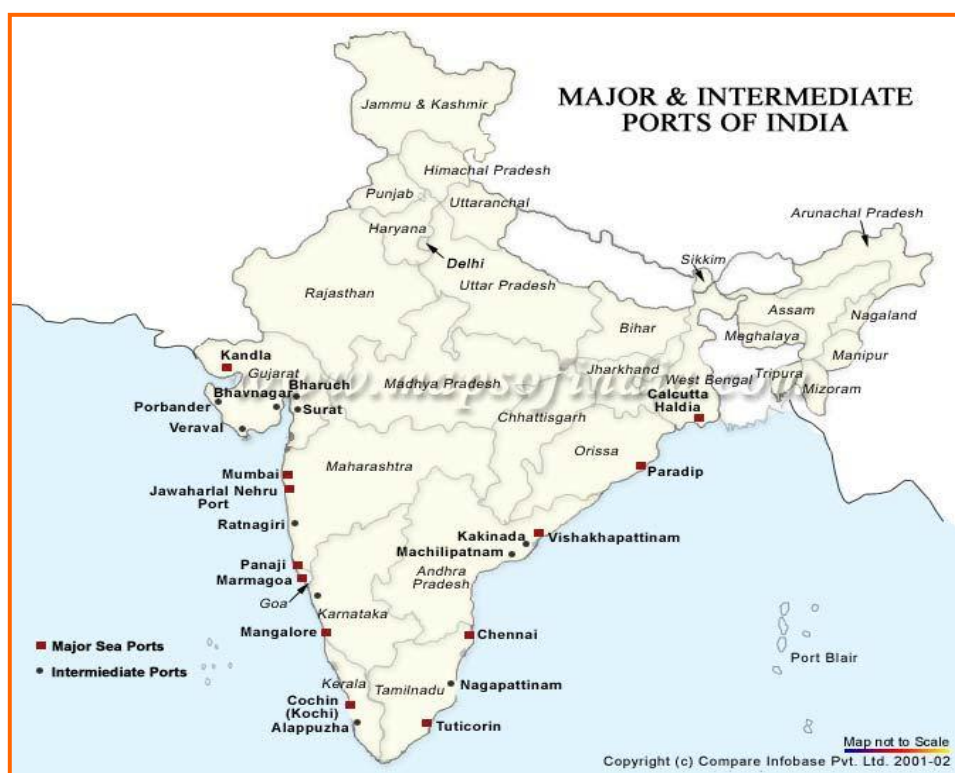
Areas of private investment

1.6.11 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.

II. 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 around 7517 Kms with 12 major ports and 200 notified non-major (minor/intermediate) ports along the coast-line and sea-islands. Of the Non-Major Ports, around 61 ports are handling 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 Honourable 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, fifteen meetings of MSDC have been held.

2.4 PORT POLICY IN MARITIME STATES

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. A snap view of the location of ports in Gujarat is given in **Chart –VII.**

Chart – VII: Gujarat: Major and Minor Ports



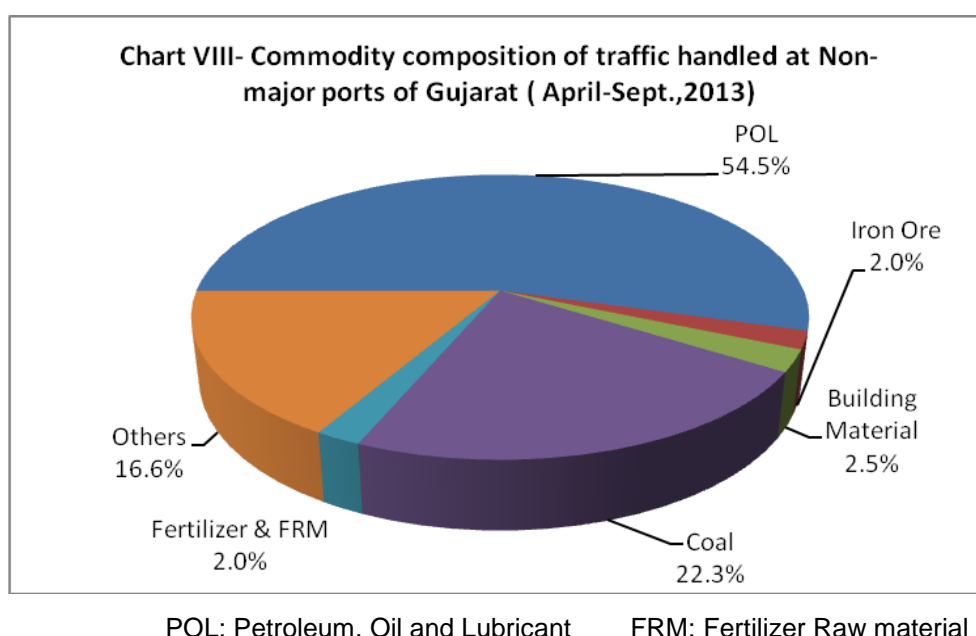
Source : http://www.gmbports.org/port_pog.htm

2.4.1.2 The trends in the cargo handled at both major and non-major ports of Gujarat State during the last few years and the first six months of the current year are given in **Table: 14**. The overall growth in port cargo traffic in case of Gujarat was 10.0% in the first half of 2013-14 as compared to 6.6% overall cargo growth in India.

Table 14 - Gujarat: 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	April-September	
							2012-13(P)	2013-14(P)
Major Ports	64.92	72.22 (11.2)	79.50 (10.1)	81.88 (3.0)	82.5 (0.8)	93.62 (13.5)	44.49 (7.0)	45.95 (3.3)
Non-Major Ports	150.52	152.8 (1.5)	205.58 (34.5)	230.91 (12.3)	259.03 (12.2)	287.82 (11.1)	135.97 (7.2)	152.61 (12.2)
All Ports	215.44	225.03 (4.5)	285.08 (26.7)	312.79 (09.7)	341.53 (09.2)	381.437 (11.7)	180.46 (07.14)	198.56 (10.03)
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 41% of the total cargo handled by Indian ports in the first half of 2013-14. In particular, non-major ports of Gujarat alone handled 73% 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 VIII**.



2.4.1.5 Amongst the Maritime States of India, Gujarat is one of the States, which has played a proactive role in the development of minor ports on its coastline. It announced

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)

an integrated Port Policy in December 1995. The salient features of the Policy are given in the **Box: 2**

2.4.1.6 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, capacity addition and improvement in capacity utilization. In 2012-13, 43 million tonnes of capacity is estimated to have been added at non-major ports in Gujarat.

Table : 15 - Gujarat: Non Major Ports - Current Capacity & Utilization (Million Tonnes)						
Item	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13(P)
Capacity*	198	235 (37.0)	244 (08.6)	284 (40.0)	323 (39.4)	366 (43.0)
Cargo Handled	150.52	152.81	205.58	230.91	259.05	287.82
% Utilization	76.02	65.03	84.38	81.41	80.20	78.64
* Including Lighterage Port Capacity; Figures within parenthesis indicate capacity addition in Million Tonnes during the year. (P) Provisional						

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 list of projects undertaken for capacity augmentation is given in the **Table16**.

Table 16: Major projects undertaken at Non Major Gujarat Ports				
No.	Year	Major Projects undertaken	Capacity addition	Cumulative capacity
Up to 2003		138	138	
1	2003-04	<ul style="list-style-type: none"> Container terminal at Mundra GMB jetty at Navlakhi Private jetty at Jakhau 	6 1 1	146
2	2004-05	<ul style="list-style-type: none"> Dahej LNG terminal 	5	151
3	2005-06	<ul style="list-style-type: none"> Container and Bulk terminal at Mundra LNG Terminal at Hazira 	8.5 2.5	164
4	2006-07	<ul style="list-style-type: none"> Hazira: Extension of captive jetty by Essar Mundra: T-2 bulk terminal at Mundra Mundra: Additional 2 berths for container 	8 6 2	182
	2007-08	<ul style="list-style-type: none"> Establishment of additional one SPMs at Sikka by M/s Reliance. Expansion of Pipavav port by Gujarat Pipvav port Ltd. Private jetty at Navlakhi 	10 5 1	198
5	2008-09	<ul style="list-style-type: none"> Establishment of additional 2 SPM SPM at Sikka by BORL 	25 12	235
6.	2009-10	<ul style="list-style-type: none"> Establishment of SPMs at Bhogat by Cairn Energy Deepwater jetty by Essar at Magdalla port 	10 15	243.64
7.	2010-11	NA	40	283.64
8.	2011-12	NA	39.36	323.00
9.	2012-13	NA	43	366.00
Source : Gujarat Maritime Board NA : Not Available				

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 13 handle cargo. Maharashtra Maritime Board (MMB) 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 which are given in the **Box: 3**.

Box:3-Maharashtra: Policy Initiatives for Port Development:

- Development on BOOST basis
- Developer's 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 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: 18**.

Table 18 - 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(P)	April-September	
							2012-13 (P)	2013-14(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)	61.44 (04.1)	58.51 -(04.8)
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)	11.14 (38.0)	11.28 (1.3)
All Ports	124.24	119.6 -(03.7)	127.35 (06.5)	133.78 (05.0)	141.87 (06.0)	146.73 (03.4)	72.58 (08.2)	69.79 -(03.8)
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.

2.4.3.2 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: 19**.

Table 19: 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(P)	April-September	
							2012-13(P)	2013-14(P)
Major Ports	35.13	41.68 (18.6)	48.85 (17.2)	50.06 (02.5)	39.05 (-22.0)	17.69 (-54.7)	12.66 (-22.9)	5.16 (-59.2)
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)	3.22 (-38.4)	3.33 (03.4)
All Ports	47.96	53.58 (11.7)	62.75 (17.1)	64.64 (03.0)	53.52 (-17.2)	21.08 (-60.6)	15.88 (-26.6)	8.49 (-46.5)
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 11 non-major ports in Karnataka. The ports of Karwar, Belekary and Mangalore are three main 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 few years and first six months of the current and previous year are given in **Table: 20**.

Table 20 - 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(P)	April-September	
							2012-13(P)	2013-14(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)	16.74 (04.4)	19.38 (15.8)
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)	0.28 (13.9)	0.21 (-26.2)
All Ports	44.92	41.66 (-07.3)	44.08 (05.8)	34.65 (-21.4)	33.53 (-03.2)	37.65 (12.3)	17.02 (04.5)	19.59 (15.1)
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 has been commissioned on a BOT basis under 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 first six months are given in **Table: 21**. In Kerala, the 3 non-major ports viz, Azhikkal, Beypore and Vizhinjam are handling most of the cargo traffic for the last few years.

Table 21 - 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(P)	April-September	
							2012-13(P)	2013-14(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)	10.13 (03.9)	10.85 (07.1)
Non-Major Ports	0.10	0.13 (30.0)	0.12 (-07.7)	0.12 (00.0)	0.10 (-16.7)	0.09 (-10.0)	0.03 (-26.7)	0.04 (6.1)
All Ports	15.91	15.63 (-01.8)	17.55 (12.3)	17.99 (02.5)	20.19 (12.2)	19.93 (-01.3)	10.16 (03.8)	10.89 (07.1)
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 five 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. 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: 22**.

Table 22 - 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(P)	April-September	
							2012-13(P)	2013-14(P)
Major Ports	90.19	91 (00.9)	95.55 (05.0)	98.2 (02.8)	98.77 (00.6)	99.55 (00.8)	49.16 -(01.0)	53.02 (07.9)
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)	0.47 -(28.0)	0.41 -(14.3)
All Ports	91.08	91.9 (00.9)	96.72 (05.2)	99.81 (03.2)	99.98 (00.2)	100.48 (00.5)	49.63 -(01.3)	53.43 (07.6)
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 20.7 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. The status of privatized ports and private investment in Andhra Pradesh Ports is as follows:

Status of Privatized 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 Jan 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. The port has started handling cargo.

Proposed Private Investment

The proposed investments in approved port projects are (i) Gangavaram Port (Rs.2750crore); (ii) Krishnapatnam Port (Rs.2000 crore); and (iii)Kakinada Deep Water Port Expansion (Rs.900 crore).

2.4.7.3 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 - 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(P)	April-September	
							2012-13(P)	2013-14(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)	30.31 (-16.0)	28.94 (-04.5)
Non-Major Ports	19.29	29.72 (54.1)	43.69 (47.0)	43.27 (-01.0)	45.63 (05.5)	51.83 (13.6)	24.91 (15.9)	30.51 (22.5)
All Ports	83.89	93.63 (11.6)	109.19 (16.6)	111.31 (01.9)	113.05 (01.6)	110.87 (-01.9)	55.22 (-04.1)	59.45 (07.7)
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 K.Ms. 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. Fourteen Potential Port locations identified in the State are as follows:-

Name of the Port Locations	District
(1)	(2)
Gopalpur	Ganjam
BahudaMuhan (Sonepure)	Ganjam
Palur	Ganjam
Baliharichandi	Puri
Astaranga	Puri
Jatadhar Muhan	Jagatsingpur
Barunei Muhan	Kendrapara
Dhamra	Bhadrak
Chudamani	Bhadrak
Inchuri	Balasore
Chandipur	Balasore
Bahabalpur	Balasore
Subarnarekha Mouth (Kirtania)	Balasore
Bichitrapur (Talashari)	Balasore

Dhamra Port

2.4.8.3 Government of Orissa had signed a Memorandum of Understanding with International Sea Ports Limited on 31.03.1997 for development of Dhamara Port. Concession Agreement was signed between Government of Orissa and International Sea-Ports Limited on 02.04.1998. The Special Purpose Company i.e. Dhamara Port Company Limited (Tisco and L&T 50%:50% basis) is developing the port. The Dhamra Port has started operations from May 2011. The Company shall share with the Government ITS gross income in accordance with formula given below:

Period commencing from Share as in-operation date	Percentage of Income to company payable to Government by the Company
1 st to 5 th year	5%
6 th to 10 th year	8%
11 th to 15 th year	10%
16 th year to end of lease period	12%

Gopalpur Port

2.4.8.4 Gopalpur Port was operating as a seasonal lighterage port from 1986-87 by Government. This port was closed during 2003-04. The Concession Agreement between Government of Orissa and Gopalpur Ports Limited was signed on 14th September, 2006 on BOOST basis. The Company will share with the Government, “Gross Revenue of Company” on the basis of sharing percentages mentioned below:-

Period commencing from take over date i.e. 30.10.2006	Percentage of “gross revenue of company” to be paid to the Government as share by the Company
1 st year	NIL
2 nd to 4 th year	1.5%
5 th to 9 th year	5%
10 th year to end of Concession period	7.5%

2.4.8.5 The Port was handed over to Gopalpur Ports Limited on 30th October, 2006 for construction. The environment clearance from MOEF, Government of India has been obtained for the Phase-II of the Port on 30th March, 2011.

2.4.8.6 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: 24**.

Table 24 - 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(P)	April-September	
							2012-13(P)	2013-14(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)	25.63 (-08.5)	34.12 (33.1)
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)	4.55 (171.7)	6.65 (46.4)
All Ports	42.74	46.71 (09.3)	57.43 (23.0)	56.43 (-01.7)	59.33 (05.1)	67.62 (14.0)	30.18 (01.7)	40.77 (35.1)
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 non-major port namely Kulpi is being developed for which consultants have been shortlisted. 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 few years and first six months of the current and previous year are given in **Table: 25**.

Table 25 - 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(P)	April-September	
							2012-13(P)	2013-14(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)	19.88 (-14.9)	20.94 (05.3)
Non-Major Ports	-	-	-	-	-	-	-	-
All Ports	57.33	54.22 (-05.4)	46.43 (-14.4)	47.55 (02.4)	43.25 (-09.0)	39.93 (-07.7)	19.88 (-14.9)	20.94 (05.3)
Figures in bracket represents percentage change over the previous year/period. P- Provisional								

2.4.10 ANDAMAN & NICOBAR ISLANDS

2.4.10.1. The trends in cargo handled at ports of the Union Territory during the last few years and first six months of the current and previous year are given in **Table: 26**.

Table 26 - 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(P)	April-September	
							2012-13(P)	2013-14(P)
Andaman & Nicobar Islands	2.16	2.01 (-06.9)	2.07 (03.0)	1.68 (-18.8)	1.21 (-28.0)	1.36 (12.4)	0.67 (15.4)	0.71 (05.5)
Figures in bracket represents percentage change over the previous year/period. P- Provisional								

2.4.11 OTHER NON-MAJOR PORTS

2.4.11.1. The other non-major ports are spread across the Union Territories (UTs) of Daman & Diu, Puducherry, and Lakshadweep. These ports in the UTs are administered through their respective Departments. 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 these ports of the State during the last few years and first six months of the current and previous year are given in **Table: 27**.

2.4.11.2 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.

Table 27 - 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(P)	April-September	
							2012-13(P)	2013-14(P)
Lakshadweep	0.03	0.03	0.03	0.03	0.03	0.03	0.01	0.01
Puducherry	0.01	0.05	1.32	4.71	6.42	6.91	3.97	3.25

III. EFFICIENCY INDICATORS OF MAJOR PORTS

3.1 Major ports have improved their efficiency of operations as reflected in select physical performance indicators over the last several years. Some key indicators of physical performance for select years and for current half year in comparison with corresponding period of previous year are elaborated in this section.

3.2 Average Turn Round Time (TRT)

3.2 1. This parameter has improved significantly during the past two 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, Average TRT for all major port has shown an increase to 4.63 days in 2009-10 and 5.29 in 2010-11. Average TRT in 2011-12 had decreased to 4.56 days. During April-September 2013, the TRT at 4.13 was lower compared to 4.15 days in the corresponding period of the last year with a range between 1.73 days at Cochin Port to 5.69 days at Kandla Port. 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 2012-13 and April-September 2013-14 is presented in the Chart- IX.

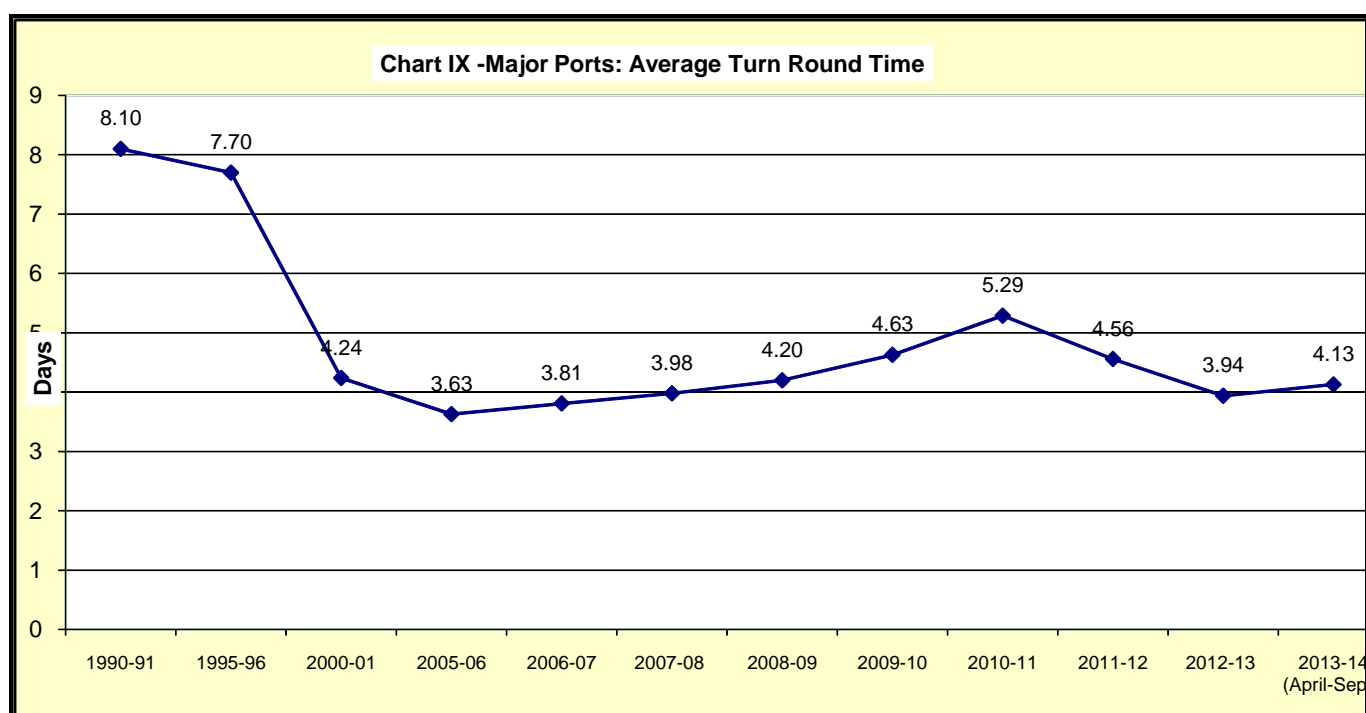


Table 28: Average Turn Round Time (days)									
Port	1990-91	2000-01	2008-09	2009-10	2010-11	2011-12	2012-13	April-September	
								2012-13(P)	2013-14(P)
1	2	3	4	5	6	7	8	9	10
Kolkata D.S	11.90	5.50	5.10	6.80	6.21	5.45	4.50	4.61	4.51
Haldia D.C	6.47	3.97	4.21	5.01	4.45	3.62	3.99	3.73	4.99
Paradip	8.40	4.16	4.78	9.04	7.73	6.33	4.39	3.99	5.08
Vishakhapatnam	7.07	3.71	3.93	4.78	5.84	5.68	5.39	5.38	4.79
Ennore	-	-	2.35	2.11	2.78	2.17	2.95	2.47	4.39
Chennai	7.20	5.83	4.15	4.04	4.36	3.91	3.24	3.40	2.55
Tuticorin	4.70	4.10	3.64	3.90	4.00	4.94	4.31	4.43	3.76
Cochin	4.00	3.11	2.14	2.08	2.20	1.82	1.64	1.54	1.73
New Mangalore	4.96	2.89	3.00	3.06	2.70	2.95	3.29	3.12	3.23
Mormugoa *	6.40	4.25	5.95	8.91	10.43	7.68	3.93	4.28	4.47
J.L.Nehru	-	2.21	1.90	2.01	2.64	1.94	2.54	2.76	2.68
Mumbai	10.80	5.20	4.95	4.61	4.96	5.22	5.02	4.76	4.95
Kandla	10.00	4.72	7.26	5.03	5.90	6.42	6.40	6.27	5.69
All Ports	8.10	4.24	4.20	4.63	5.29	4.56	3.94	4.15	4.13
(P) Provisional * Relate to dry bulk cargo for MOHP(Mech.) and Berth No. 10 &11 (Conv) 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 (PBDT) for all major ports declined from 2.2 days in 1990-91 to 0.96 days in 2004-05. Thereafter, average PBDT for all major ports has shown an increase to 1.63 in 2008-09 and 2.32 in 2010-11. However, average PBDT on port account has seen a sharper decline from 2.10 days in 1990-91 to 0.2 day in 2004-05. In 2012-13, average PBDT on Port account increased to 0.49 days. During the first six months of 2013-14, average PBDT on port account decreased to 0.45 days compared to 0.49 days during April-September 2012-13. Average PBDT was maximum (1.60 days) at Haldia during the first half of current year. Improvement in average PBDT on port a/c during April-September 2013 as compared to corresponding period of 2012 is evident in case of all Major Ports except Haldia, Paradip, JNPT and Mumbai. Port-wise PBDT 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, 2004-05 and onwards is shown in **Chart X**.

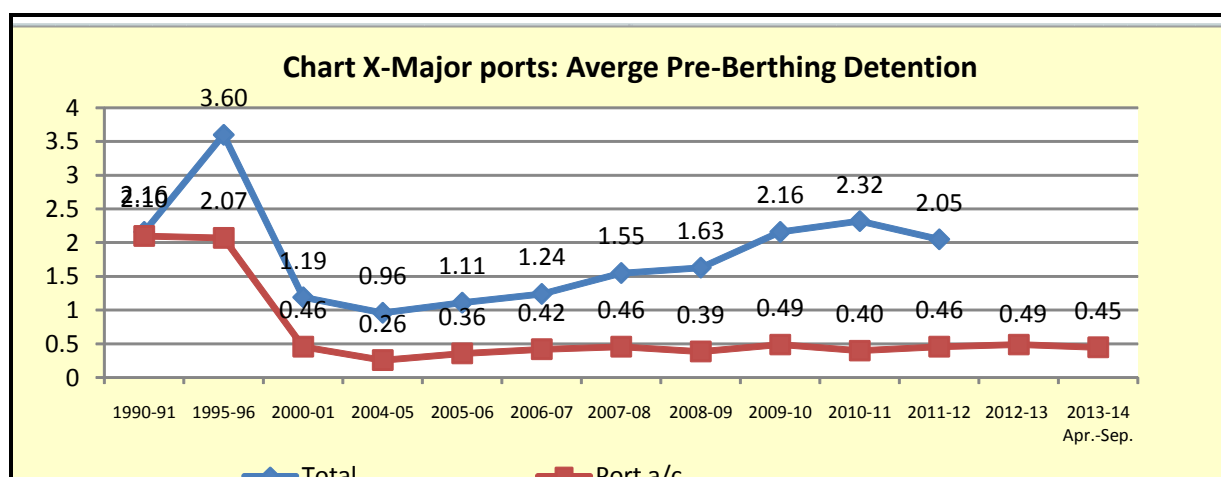


Table 29 : Average Pre-Berthing Detention(Days)

Port	1990-91	2000-01	2008-09	2009-10	2010-11	2011-12	2012-13*	April-September	
								2012-13*	2013-14*
1	2	3	4	5	6	7	8	9	10
Kolkata D.S	0.9	0.61	0.66	1.31	1.23	0.77	Neg.	0.00	0.00
Haldia D.C	1.66	0.91	3.38	4.39	3.73	2.54	0.85	0.78	1.60
Paradip	1.59	1.41	2.32	6.30	5.04	3.69	0.05	0.03	0.05
Vishakhapatnam	1.83	0.75	1.28	1.90	2.81	2.84	0.06	0.07	0.04
Ennore			0.27	0.37	0.65	0.76	Neg.	0.00	0.00
Chennai	2.1	2.45	1.39	1.35	1.61	1.16	0.04	0.04	0.04
Tuticorin	0.9	1.4	1.09	1.36	1.29	1.91	0.35	0.41	0.27
Cochin	0.83	0.74	0.7	0.85	1.03	1.05	0.06	0.06	0.04
New Mangalore	0.79	0.77	0.65	0.81	0.59	0.79	0.05	0.05	0.02
Mormugoa**	2.51	1.32	1.77	3.46	4.07	2.94	0.81	0.27	0.10
J.L.Nehru		0.67	0.95	0.98	1.51	1.13	0.38	0.46	0.56
Mumbai	3.4	1.26	1.41	1.06	1.23	1.37	3.35	0.27	0.54
Kandla	4.4	1.51	2.62	2.60	3.32	3.74	2.05	1.99	1.03
All Ports	2.16	1.19	1.63	2.16	2.32	2.05	0.49	0.49	0.45

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

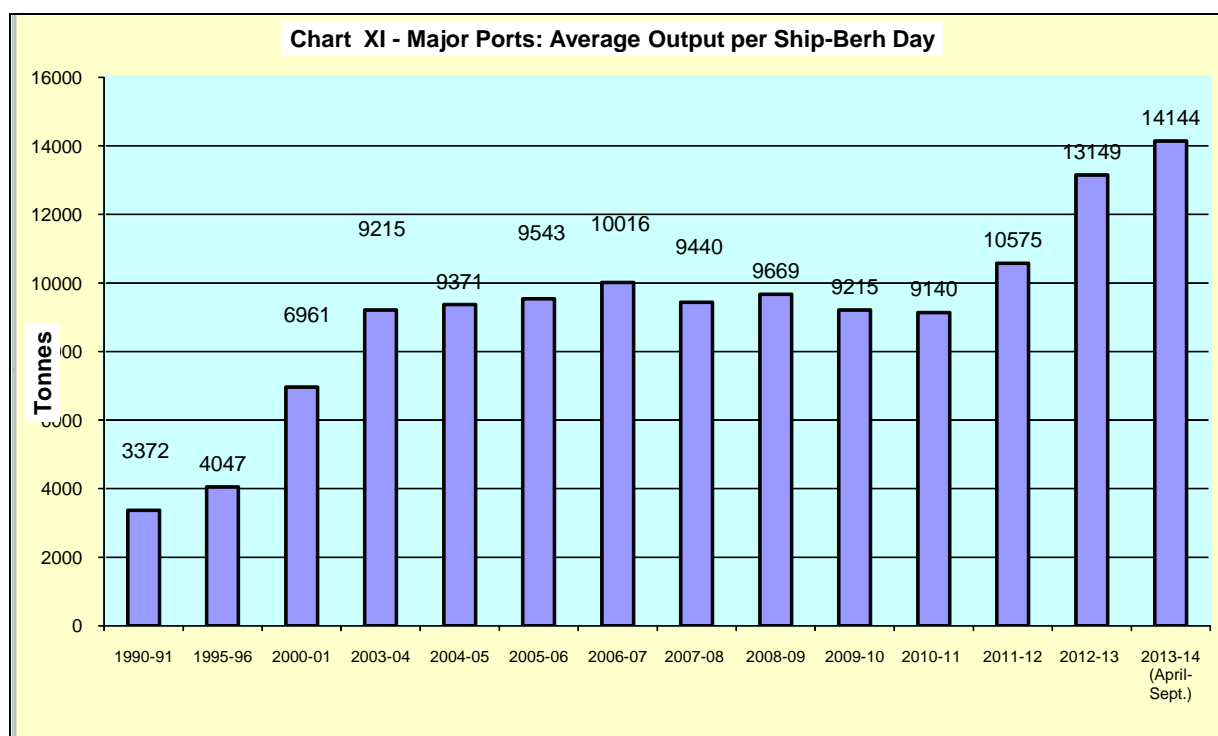
** Relate to dry bulk cargo for MOHP(Mech.) and Berth No. 10 &11 (Conv.)

3.4 Average Output Per Ship Berth-day

3.4.1 During the last 20 years this indicator has seen a tremendous improvement. Average Output per Ship-berth day has shown close to four fold increase from 3,372 tonnes in 1990-91 to 13149 tonnes in 2012-13 for major ports. However, average output per ship berth day is marked by substantial variation across major ports ranging from a high 26199 tonnes in case of JNPT to a low of 3129 tonnes at Kolkata Dock System during April-September, 2013. This variation reflects the type of cargo being handled, level of mechanization and labour practices. Amongst the major ports improvement in average output per Ship-berth day during April-September 2013-14 as compared to April-September 2012-13 is discernible in all major ports except Haldia DC, Ennore, Cochin and Mormugao. Port-wise average output per Ship-berth day for selected years and latest period are given in **Table: 30.**

Table 30 : Average Output per Ship-Berth-Day (Tonnes)									
Port	1990-91	2000-01	2008-09	2009-10	2010-11	2011-12	2012-13	April-September	
								2012-13(P)	2013-14(P)
1	2	3	4	5	6	7	8	10	10
Kolkata D.S	560	2305	3027	1917	2253	2503	2984	3060	3129
Haldia D.C	5659	6384	7732	6243	6563	6728	6072	6417	5640
Paradip	4082	8503	12635	13853	14243	15995	16625	16283	17148
Visakhapatnam	5325	9799	11171	10484	10334	10704	10645	10818	10940
Ennore	-	-	28424	21665	17699	27505	24498	24322	22719
Chennai	3912	6977	10778	11428	10984	10352	12462	11740	15110
Tuticorin	2130	3983	5817	6934	7035	6733	7621	6912	9752
Cochin	3714	6138	10599	11089	11752	15784	15878	17261	16298
New Mangalore	4412	12192	13645	13896	14211	13957	15917	15215	16192
Mormugao*	10429	12438	6290	5002	4409	10530	13233	13235	10133
J.L.Nehru	-	6383	20344	21563	20393	19227	26308	25643	26199
Mumbai	2310	4213	5717	6122	6042	6476	8842	8838	9809
Kandla	4417	8230	13107	13549	14137	14272	15091	14299	15266
All Ports	3372	6961	9669	9215	9140	10575	13149	13326	14144
(P): Provisional. *Relate to dry bulk cargo for MOHP(Mech.) and Berth No. 10 &11 (Conv.)									
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 XI.



IV. PRIVATE SECTOR/CAPTIVE/JOINT SECTOR PORT PROJECTS

4.1 Brief details of the approved Private Sector/Captive/Joint Sector Port Projects and a list of these projects under consideration as on 30.09.2013 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. Million)	Project Status
1	2	3	4	5	6
1	Installation of 2 Nos. shore based unloaders in Coal Berth-2 (Captive user berth of Tamil Nadu Electricity Board)	Ennore	4	70	2 Nos. of unloader erection work is in progress. The tentative completion of first unloader installation by May 2014 and Second unloader by November, 2014.
2.	Construction of two New Off-shore Container berths & Development of Container Terminal berth on BOT basis in Mumbai Harbour.	Mumbai Port	1.00 Mn TEUs	14610	Jetty Construction work is ready. Berth structure completed. Ministry denied security clearance for procuring equipment from Chinese suppliers. M/s ICTPL have forwarded names of four firms from whom they intend to procure the equipment. Board decided to terminate the dredging contract. Fresh tenders invited and are due on 18.10.2013. The validity of Environmental clearance extension request forwarded to MoEF on 11.1.1012 for further period of 5 years. Anticipated date of completion is May, 2015.
3.	Construction of 13 th to 16 th Cargo berth on BOT basis.	Kandla Port	8.0 MMTPA	7555	13th Berth - Work in Progress. 14th Berth - RFP received from 5 bidders on 29.6.12 Environmental clearance received on sept.12 15th Berth - LoA issued on 7.12.10 to M/s IMC Ltd. and executed agreement with KPT on 18.2.11. Date of award has been declared on 27.9.11. Work in progress. 16th Berth - LoA issued on 7.12.10 to M.s PSL Ltd and executed agreement with KPT on 18.2.11. Conditions precedents are being fulfilled by PSL.
4.	Development of dry-bulk terminal Off Tekra near Tuna outside Kandla Creek at Kandla Port on BOT basis	Kandla Port	14.1	10600	The bids will be opened after receipt of the security clearance of consortium member for one of bidders. Concession agreement will be signed with successful bidder by Feb 2012. Environment/CRZ clearance received. However, formal orders in this regard, yet to be received.
5	Setting up of SPM and allied facilities off Veera in Gulf of Kutch.	Kandla Port	12.0	6285	RFQ opened on 29.6.12. Nine bidders submitted. RFQ are under evaluation. CCI note is under sublimation. Security clearance proposal sent on 27.7.12
6	Construction of barge jetty at IFFCO	Kandla Port	2	277	Award of concession given to M/s IKBLL on 11/8/11.
7	Barge handling facilities at Bunder Basin on BOT basis	Kandla Port	3	1096	2 RFQ qualified clearance from all agencies except MHA received.

8	Development of oil jetty to handle liquid cargo & ship bunkering terminal at old Kandla on PPP mode	Kandla Port	3	2765	EOI evaluation completed. Feasibility report, RFQ and TAMP proposal under approval. RFQ to be invited shortly.
9	Development & Operation of International Container Transshipment Terminal (ICTT) at Vallar-padam (BOT basis by M/s India Gate-way Terminal Pvt. Ltd. a subsidiary of M/s. Dubai Ports International)	Cochin	12.5 MT to 40 MT in phases	21180	Phase I of the ICTT Project with an investment of Rs. 1,262 crores partly commission on 11 th February, 2011.
10	Setting up of LNG Regasification Terminal at Puthuvypeen by M/s Petronet LNG Ltd. on captive basis.	Cochin	5 MT	41500	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. Agreement between Cochin Port Trust and M/s PLL has been executed on 12.3.2009. First LNG ship 'Wil energy' berthed on 20.8.2013 and the gas has been transferred successfully to the tank farms and after cool down of the terminal, ship left on 26.8.2013. PLL had reported that Kochi LNG Terminal project has been commissioned by 10 th September 2013. High pressure gas send out has been commenced from terminal to BPCL and FACT. The terminal is capable to operate at its 5 Million capacity per annum but due to limited evacuation capacity and incompleteness of gas pipelines to Mangalore, Bangalore and Kayamkulam its regasification capacity is hardly being utilized. The work on the pipeline was reviewed by the Vice Chairman, State Planning Board with the 7 concerned District Collectors in January, February and April, 2013. The State Administration expects to have the pipeline to Bangalore and Mangalore in place by December, 2013. Review meeting was taken by Advisor to Prime Minister on 8.5.13 to review the progress of interrelated projects, viz. LNG Terminal at Puthuvypeen, Pipeline Projects of GAIL in Kerala, Expansion of capacity of NTPC at Kayamkulam.
11	Setting up of Mechanised Iron Ore handling facilities at berth No. 14 by M/s. SICAL Logistics Limited on BOT basis.	New Mangalore	3.62 MTPA (Capacity of Jetty)	2960	Letter of Award was issued on 23 rd September, 2009 to M/s SICAL logistics Ltd., Concession agreement has been signed on 19.10.2009. Work has not commenced due to ban on export & movement of Iron Ore fines imposed by Govt. of Karnataka. Concessionaire requested Performance Excuse under Force Majeure clause The meeting held for negotiations as per Article No. 14.10 for amicable settlement due to continuation of Force Majeure. The party did not agree. Ban on mining iron ore lifted by Hon'ble Supreme Court. Opportunity given to commence the work with revised programme within one month. Concessionaire requested to settle the issue with mutual agreed action. Board further gave six months and give milestones failing which necessary action will be taken to terminate the contract as per the provisions of agreement.

					Accordingly, Board issued letter on 8.10.13.
12	Construction of North Cargo Berth . I (Captive use)	Tuticorin	6.30 MTPA	375	Berth construction completed on 25.7.2012. Berth handed over to NTPL for installation of their conveyers and shore unloader . Agreement yet to be signed/ executive due to incorporation /deletion of clauses clarification sought from the Ministry. All the work except fixing of tender completed.
13	Development of Mega Container Terminal	Chennai	4 MTEU (48 MTPA)	36860	Ministry accorded approval on 22.10.2010 for the project. Fresh Bids invited in accordance with clause 3.3.1 of RFP on 10.1.2012. Seven Bidders have received the RFP documents. The Bid Due Date was extended from 27.2.2012 to 22.3.2012. Two bids were received and will be opened on receipt of Security clearance from the Ministry.
14	Development of Ro Ro cum Multi Purpose Berth and Multi Level Car park in Bharathi Dock	Chennai	1 MTPA	1000	DPR is finalized appointment of TA under process. RFQ was invited and opened on 26.3.2012. 16 applications have been received. Applicants are being referred to the Ministry for national security clearance. Revised SFC memo with documents forwarded to Ministry on 17.9.12.
15	Development of Barge handling facility	Chennai	1 MTPA	260	RFQ was invited and opened on 28.3.2012. 7 Application have been received. Revised SFC memo with draft RCP document sent to ministry on 17.9.12
16	Development of Rajiv Gandhi Dry Port and Multi Modal Logistic hub at Mappedu, Sriperumbudur	Chennai		4150	Bids opened on 31.8.12. 11 firms submitted RFQ applications witch is under scrutiny by Transaction Adviser.
17	Development of WQ 6 berth in Inner Harbour for handling Multi cargo on - DBFOT basis.	Visakhapatnam	2.08	1145	Concession was awarded on 7.10.2011 and the work is in progress. Expected date of completion is October, 2013. @
18	Development of EQ-10 berth in Inner Harbour for handling Liquid Cargoes & Chemicals on DBFOT Basis.	Visakhapatnam	1.85	553.8	Concession was awarded on 10.10.2011 and work is in progress. Expected date of completion is April, 2013. @
19	Development of Deep Draft Iron Ore Berth on BOT basis	Paradip Port	10.00	5913	The project has been put to re-tender. 08 nos. of RFQ documents have been received on the bid due date and the same are under evaluation. All statutory clearances are in place. However, there is a Apex Court stay order on the project site. PPT is making all efforts to get the Apex Court Stay lifted on the project site so that there are no hindrances in handing over of the project site to the selected BOT operator.
20	Development of Deep Draft Coal Berth on BOT basis	Paradip Port	10.00	4790	Concession agreement has been signed with M/s Essar Paradip Terminal Ltd. on 10.11.2009. Environmental clearance and CRZ clearance were obtained on 4.1.2011. After receipt of Forest clearance on 2.7.12, Essar was asked to complete financial closure & other formalities and begin mobilization activities to the site. Essar have responded that once the project site is handed over to them, they would submit all documentation and begin construction activities. Once the Supreme Court stay on the project site is lifted, the site would be handed over to Essar for

					commencing construction activities.
21	Development of mechanized coal import terminal at berth No.11	Mormugao	2.00	2040	Concession agreement signed with M/s. Mormugao Terminal Ltd. on 18.1.13. Period of satisfying conditions precedent extended by 120 days upto 14.11.13 on expiry of initial 180 days. Appointment of Independent Engineer; Bid offers received and scrutiny in progress.
22	Enhancement of Cargo Handling capacity by installing rapid in motion wagon loading facility by SWPL	Mormugao	2.50	450	Concessionaire M/s SWPL of Berth No. 5 & 6 has been granted permission by Board for construction of Silo and Conveyor System on way leave basis. Work commenced from 1.4.13 and likely to be completed in June, 14. Physical & Financial progress of work is 40% and 43% respectively.
23	Conversion of berth No. 8 as container terminal on BOT basis.	Tuticorin	7.2 MTPA	3122	LOA issued to M/s Dhakshin Bharath Gate way Terminals Pvt. Ltd. 7.8.12 with a gross revenue share of 55.19%. Concession Agreement signed on 4.9.12. Work is in progress. Two number of reach stackers received. M/s STUP Consultant, Chennai is appointed as Independent Engineer for the project.
24	Construction of One Number of Shallow Draught Berth on DBFOT Basis.	Tuticorin	2.67 MTPA	841	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. Tender is under evaluation stage for fixing Independent Engineer.
25	Development of North Cargo Berth . II on DBFOT basis.	Tuticorin	7.2 MTPA	3322	The Concession agreement signed with M/s ABG-LDA Bulk Handling Pvt. Ltd. on 11.9.10. The site was physically handed over to the concessionaire on 15.4.11. About 86.08% of work completed physically. Tendering is in process for carry out dredging work in front of the Berth by the Port.
26.	Development of North Cargo berth . III	Tuticorin	9.15	4200	The Port Trust board in its meeting held on 30.1.13 has accepted the Gross Revenue Share percentage (30%) of H1 Bidder M/s Transstroy OJSC Consortium. As per the Honble Supreme Court order dated 7.5.13. No final order is to be passed in the matter, awarding the contract without the leave of this court. Port filed IA on 1.2.13 for getting permission of the Honble Supreme Court for issue of LOA. Honble Supreme Court issued interim order on 4.10.13 to issue LOA to the successful bidder subject to Special leave petition (SLP) scheduled on 10.12.13. Accordingly, LOA issued to M/s Transstroy . OJSC Consortium, Hyderabad on 8.10.13 with a gross revenue share of 30%.
27	Development of North Cargo berth . IV	Tuticorin	9.15	3550	LOA was issued to M/s Transstroy OJSC 2013 at the final negotiated revenue share of 30% on 30.1.13. Concession Agreement signed on 17.4.13. NIT issued for appointing Independent Engineer for the project and fixing the last date for sale of tender as 30.10.13.
28	Upgradation of Mechanical Handling Equipments in berth No, 1 to 6 and	Tuticorin	8.72 MTPA	492	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.

	berth No. 9 on BOO basis.				Work is in progress. This work is likely to be completed during 2013-14.
29	Development of Coal handling terminal at Berth No.7 on Design, Build, Finance, Operate and Transfer (DBFOT) basis	Mormugao	4.61	4060	The terminal is being developed by M/s Adani Mormugao Port Terminal Pvt. Ltd. Ahmedabad. As on 30.9.13 the physical progress is 78.04% and financial progress is 97.08%. Expected to be completed and ready for commercial operation by June, 14.
30	Development of Coal handling terminal at Berth No.7 on Design, Build, Finance, Operate and Transfer (DBFOT) basis	Mormugao	4.61	4060	The terminal is being developed by M/s Adani Mormugao Port Terminal Pvt. Ltd. Ahmedabad. As on 30.9.13 the physical progress is 78.04% and financial progress is 97.08%. Expected to be completed and ready for commercial operation by June, 14.
BOT: Build Operate and Transfer; BOO: Build Own Operate; DBFOT:Design, Build, Finance, Operate and Transfer. @ Project status as on 31.3.2013					

**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.	Development of Multi-Purpose berths to handle clean cargo including container on BOT basis.	Paradip	5.0 MTPA	3873	The project has been put to re-tender. 05 nos. of RFQ documents have been received on the bid due date and the same are under evaluation. Environmental clearance and CRZ clearance are in place. Stage-I Forest clearance has been obtained. Stage-II Forest Clearance is under process and likely to be obtained prior to signing of the concession agreement with the selected BOT operator.
2.	Mechanization of EQ 1 to EQ 3 berths at Paradip Port on captive user basis.	Paradip	30	15379	Since February, 2013 this was proposed to be awarded to Mahanadi Coalfield Ltd. (PS) on nomination basis for captive use. MCL were requested to obtain approval from Coal India Ltd. & Ministry of Coal and also submit the project proposal with feasibility report and commercial offer including minimum guaranteed through put (MGT) to be offered by them for evaluation of the proposal at the earliest. Since there has been no progress by MCL, it has been put up to the Board for proceeding with the project on BOT basis through PPP route.
3	Development of LNG Terminal	Ennore	5.00	4512	Approval for setting up of LNG Terminal by IOCL on its own or through a Joint Venture Company subject to Govt. approval. Allotment of land to the JV let by M/s IOCL for development of LNG Terminal. Signing of MoU with IOCL under process. Various meetings held for finalization of commercial terms of the Concession Agreement.
4	Coal Berth-III	Ennore	9	269.1	Detailed design & drawing for inviting tender for construction of Coal Berth-III is under process.
5	Development of Container Terminal on DBFOT basis	Ennore	18	1270	Board of Directors have granted approval for rebidding. Request for qualification issued and 11 applicants have responded. PPP AC memo along with required document forward to Ministry for approval. Evaluation process for short listing in progress.
6	Development of Multi Cargo Berth on DBFOT basis	Ennore	2	151	Board of Directors have granted approval for the project. Request for qualification issued, 9 applicants submitted RFQ and evaluation under progress.
7	Fourth Container Terminal (DBFOT Basis).	Jawaharlal Nehru	60	79150	The RFQs from 8 agencies are received on 19.8.13. Evaluation is in progress. Proposal is forwarded for security clearance from GOI. The Port submitted PPP AC memo to MoS.
8	Development of standalone container	Jawaharlal Nehru	10.0	6000	Letter of award is issued on 31.10.12 to M/s DP World Pvt. Ltd. The

	handling facility with a quay length of 330 m. to the north of JNPT.		MTPA		concession agreement signed on 19.6.13. The concession will be awarded after compliance of condition precedent.
9	New Cruise Terminal near Gateway of India.	Mumbai	0	18600	The DPR is taken on record. Balance payment is being made to the contractor. Contract is being closed.
10	Dredging & Infrastructure development for handling bigger ships at 18 to 22 ID Harbour Wall Berths.	Mumbai		6130	The project is earmarked for implementation through PPP mode. RFQ document is under preparation. Tender issued to 11 shortlisted forms for appointment of Transaction Adviser. M/s RITES Ltd. Appointed as Transaction Adviser and letter of award issued on 7.5.2013. Board review DPR and revised cost estimate of Rs. 613 crores. Tariff fixation proposal sent to TAMP on 16.8.13. Extension of validity of Environmental clearance was considered by MoEF and recommended for 5 years. Communication is awaited.
11	Development of off-shore multipurpose cargo berth	Mumbai	4 MT	6090	RFQ document opened on 2.8.13. Three firms submitted applications. Board approved all three firms. Security clearance received. RFP issued on 1.10.13. Traffic fixation proposal sent to TAMP on 16.8.13. Application for TOR for EIA/RA study required prior Environmental clearance. Matter is being pursued, SEAC-I Committee is yet to be constituted, and therefore no proposals are considered.
12	Development of Container Freight Station	Mumbai		800	Invitation of offers for appointment of consultant for preparation DFR including augmentation of existing container freight stations through PPP. Work order placed on M/s KPMG on 3.9.13 subject to ex-post-facto sanction for accepting L1.
13	Development of facilities for handling & storage of bulk cement	Mumbai	1.25 MT	950	Tender for leasing of land for setting up facilities for handling bulk cement and bagging plant floated on 8.5.13. Due to change of policy tender is withdrawn. Fresh tender invited, approval obtained for short listing. The price bid accepted by the Board.
14	Development of Coal handling facilities at Mumbai Port Trust	Mumbai	3 MT	500	Invitation of offers for appointment of consultant for preparation of DFR through PPP. Six firms submitted bids. Work order placed on M/s Tata Consulting Engineers Ltd. Inception report submitted. Work is in progress.
15	Development of Bunkering Facilities Terminals at Mumbai Port Trust	Mumbai			Tender for consulting services for preparation of DPR through PPP. Scrutiny of Technical cover is in progress. TC meeting held for pre-qualification of bidders.
16	Barge handling facilities at Khori Creek	Kandla	4	1000	Under planning stage
17	Construction of T shape Jetty at at Tekra (Phase-II)	Kandla	14	15000	The scheme will spill over in 13 th five year plan. Under planning stage.
18	Setting up of barge jetty at Tuna on captive use basis	Kandla	1.5	220	EOI invited. Only M/s Shree Renuka Sugars has submitted application till due date. Committee recommended the proposal submitted by M/s Shree Ranuka Sugars and also recommended to put up to the Board for

					approval.
19	Construction of barge jetty at Tuna on BOT basis	Kandla	5.49	2553	Feasibility Report, RFQ and TAMP proposal under approval.
20	Strengthening of oil jetty 1 & 2 to handle 13/14 m. draught vessels	Kandla	1.57	154	Detailed estimate under preparation.
21	Development of Port based multi product SEZ	Kandla	-	10950	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.
22	Development of Container Term-inal on BOT basis.	New Mangalore	4.50 (3.74 lakh TEUs)	2697.3	RFQ documents issued from 20 th July, 2009 to 5 th September,2009. Pre-application Conference held on 18 th August, 2009. 5 bidders have submitted their RFQ application on 30.09.2009. The PPPAC Memo submitted on 14.9.2009. Proposal for security clearance in revised format sent on 2.12.2009. TAMP consultative hearing held on 6.1.2010 and approved the project. RFP document issued on 2.2.2010. Two pre bid meetings held on 24.2.2010 and 14.5.2010. Bids were due for receipt on 30.6.2010. No bids were received. The project is under review. Port has requested for relaxation of conditions of upfront tariff fixation order to attract bidders for the project.
23.	Installation of Mechanized fertilizer handling facilities at EQ-7 In inner Harbour on DBFOT basis	Visakhapatnam	5.21	2175.8	Concession agreement signed on 18.5.2012. LOA issued to independent Engineer on 4.1.2013.@
24.	Development of West Quay- North berth in inner harbour for handling dry bulk cargo on DBFOT basis	Visakhapatnam	6.39	3929.90	RFP issued on 11.02.2013 for submission of bids on 23/4/2013. No response received. Approval of the Govt received. Proposal for Security clearance was sent to Ministry on 14/12/12. Awaiting security clearance.@
25.	Extension of existing Container terminal in outer harbour on DBFOT basis	Visakhapatnam	0.54 MTEUs	6331.10	Applications for security clearance for all 7 applicants submitted to Ministry on 29.10.2012. RFP issued on 12.2.2013 and bids opened on 28/3/2013. Awaiting Security clearance and approval from Government.@
26.	Up- gradation of the existing facility and creating new facility for handling iron ore on DBFOT basis	Visakhapatnam	23.00	8454.10	Proposal for security clearance sent to Ministry on 26.12.2012. RFP issued on 12.02.2013 and bids opened on 28.03.2013. Awaiting Security clearance and approval of the Government.@
27.	Multi User Liquid Terminal (MULT) at Puthuvypeen SEZ(International Bunkering terminal at Cochin)	Cochin	4.10	2063	In principle approval for assigning the MULT projects to IOCL on nomination basis was conveyed by the Ministry as per letter dated 11.3.13 subject to certain conditions. After discussions between CoPT and IOCL draft agreement was finalized and forwarded to IOCL on 26.8.13 for intimating their acceptance. The Port held discussions with BPCL and

					HPCL on bunkering aspects of the Terminal. M/s IOCL have entrusted with CoPT, execution of construction of jetty and its associated facilities through EPC contractor. The Consultant M/s L&T Ramboll Consulting Engineers Ltd., submitted the Design Basis report and discussions were held with Port /IOCL officials on 12.9.13.
28	Development of General Cargo Terminal at Q8-Q9 berths	Cochin	4.23	1980	TAMP had passed an order on 15.2.13 fixing the upfront tariffs for the project and in the SFC meeting held on 27.2.13, the Ministry decided to recommend the project proposal for approval of the competent authority subject to certain minor amendments. Final RFP documents issued on 5.3.13 with due date of submission on 22.3.13. No bid was received. CoPT requested all the shortlisted bidders to furnish their feedback/suggestions about the project. An EoI for the project as invited so as to explore the various possibilities to make the project more investor friendly. Based on the inputs/feed back, it was decided to i) redesign the project as a coal only terminal (dropping fertilizers) and name the project as Modernization of Coal Handling in Cochin Port (ii) limit the backup area to 17 hectares by excluding the 2.3 ha. For fertilizer (iii) give an option to the Concessionaire to undertake deepening of the 800 m long channel from the ICTT basin to the terminal to cater to fully loaded Panamax vessel at 14.5 m draft; and (iv) initiate action for suitable modification of the Feasibility Report, M/s iDeCK had been retained as the Transaction Advisor for the project. Revised proposal based on revised TAMP guidelines has been sent. The consultant M/s i-maritime, Navi Mumbai entrusted for Preparation of Feasibility Report for Modernization of Coal Handling at Cochin Port have submitted the final feasibility report on 2.8.13 and accepted on 23.8.13. RFQ for the project were invited on 25.7.2013. Only one bid was received. On request, date extended upto 22.10.13. MoS conveyed Govt. approval on DBFOT basis subject to some conditions of TAMP rectification in the TAMP order. MoS directed the Port to comply with certain conditions such as restricting height of structures, equipments on berth to 29 m, obtaining NTRO clearance etc. CoPT taken up the matter with Ministry for withdrawing those conditions. SFC proposal has sent to the Ministry of 4.9.2013.
29	Development of Q1-Q3 berths in Mattancherry Wharf as Multi Purpose Terminal	Cochin	1.87	2600	M/s Samsung C& T Corporation the assignment of Preparation of Feasibility Report for Reconstruction of Mattancherry Wharf . Phase II (Q1 to Q3 Berths) was entrusted with M/s KITCO Ltd. Cochin. KITCO had submitted the final feasibility report on 3.8.13 and accepted on 21.8.13. M/s Infrastructure Development Corporation (Karnataka) Ltd. Bangalore has been appointed for Transaction Advisory Services on 6.7.13. The final TAMP proposal has been sent to TAMP on 17.9.13. M/s Ambuja Cement Ltd., also included in the users list for consultation purpose for the Upfront

					Tariff Setting Proposal. TAMP sought certain clarification and the same was provided. RFQ have been invited for the projection 22.7.13. Only one bid was received date extended. Two applications received from M/s Adani & M/s. IMC. M/s iDeCK perused the original RFQs received and they have submitted the Interim Evaluation Report on 27.9.13 which is under perusal.
30	Construction of 1 No. shallow water berth for handling construction materials	Tuticorin	2.00 MTPA	654	Court case filed by M/s Indian Port Terminal, Tuticorin. Hearing completed and awaiting for judgment. Decision will be taken accordingly.
31	Construction of a riverine jetty north of 3 rd Oil Jetty through DBFOT Basis.	Haldia Complex KoPT	3.75 MTPA	995	RFQ has been issued in February 2010 for execution of the scheme.
32	Construction of a riverine jetty south of 2 nd Oil Jetty through DBFOT Basis.	Haldia Complex KoPT	1.5 MTPA	471	Feasibility Study being undertaken, following which RFQ document would be issued.
33	Construction of a riverine jetty south of 2 nd Oil Jetty through DBFOT Basis.	Haldia Complex KoPT	1.5 MTPA	471	Feasibility Study being undertaken, following which RFQ document would be issued.
34	Construction of a riverine jetty south of 2 nd Oil Jetty through DBFOT Basis.	Haldia Complex KoPT	1.5 MTPA	471	Feasibility Study being undertaken, following which RFQ document would be issued.
35	Construction of a riverine jetty south of 2 nd Oil Jetty through DBFOT Basis.	Haldia Complex KoPT	1.5 MTPA	471	Feasibility Study being undertaken, following which RFQ document would be issued.
36	Construction of a riverine jetty south of 2 nd Oil Jetty through DBFOT Basis.	Haldia Complex KoPT	1.5 MTPA	471	Feasibility Study being undertaken, following which RFQ document would be issued.
<p>BOT: Build Operate and Transfer; BOO: Build Own Operate; DBFOT:Design, Build, Finance, Operate and Transfer. @ Project status as on 31.3.2013</p>					

**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. Million)	Project Status
1	2	3	4	5	6
1.	Development of Coal terminal for UMPP at Mundra port.	Mundra, (Gujarat)	15	20000	Three berths of 1120 mt is completed. The company has planned to complete the terminal in the year 2011-12.
2.	Navy jetty at porbandar	Porbandar, (Gujarat)	1	500	Construction is in progress.
3.	Establishment of SBM at Bhogat by cairn energy.	Bhogat, (Gujarat)	7	10000	Construction work is in final stage of completion.
4.	Second SBM at Mundra and Crude oil terminal	Mundra, (Gujarat)	9	9000	The SBM is installed.
5	Coal jetty at Salaya by Essar	Salaya, (Gujarat)	5	10000	Construction is in progress.
6	Dahej port development on BOOT basis linked port	Dahej, (Gujarat)	14	12000	Construction is in progress.
7	Bulk General cargo terminal at Hazira.	Hazira, (Gujarat)	15	10000	Construction of 2 berths completed and remaining construction is in progress.
8	Expansion of LNG handling facilities at Dahej.	Dahej, (Gujarat)	3	4500	Construction is in progress
9	Cement jetty by ABG Cement at Akrimoti, Kutch	Akrimoti, (Gujarat)	4	610	Construction is in progress.
10	Cement jetty by JP Associates at Kharo Creek	Kharo Creek, (Gujarat)	3	1400	Construction is in progress
11.	Ro Ro jetty at Dahej	Dahej (Gujarat)	1	1000	Construction is in progress

12	Development of South basin initial two container berths at Mundra	Mundra (Gujarat)	15	50000	Environmental clearance obtained. This work shall be taken up as a part of South port development for which GMB approved DPR on January 2009. Work is in progress.
13	Development of an all weather and Multipurpose Port at Dighi, Dist. Raigad	Rajpuri, (Dighi) Maharashtra	30	35000	One berth of 255 M out of a total length of 650 Mtrs is ready for commissioning shortly. Construction of remaining berth is in progress.
14	Development of an all weather and Multipurpose port at Rewas-Aware, Dist. Raigad	Thal, Rewas-Aware Maharashtra	50	52000	Environmental clearance received. Technical studies/ investigations completed. Pre- construction activities in progress.
15.	Development of an all weather and Multipurpose port at Dhamankhol- Jaigad Port Dist. Ratnagiri	Jaigad, (Dhamankhol Bay) Maharashtra	50	29000	Two berths having a total length of 550 mtrs. Already commissioned in first phase. Detailed Project Report for (Phase-II) for additional 5 berths approved. Proposal for environmental clearance under consideration of MoEF. The proposal is pending due to moratorium issued by MoEF.
16	Development of an all weather and Multipurpose port at Lavgan- Jaigad Port Dist Ratnagiri (Cargo facility + Ship Repair system)	Jaigad, (Lavgan- Bay) Maharashtra	1.2 + Ship repair	7000	The cargo berth having a quay length of 700 M commissioned in April 2012. Ship repair facility under construction.
17	Development of an all weather and Multipurpose port at Redi Port, Dist Sindhudurg	Redi, Maharashtra	5.16	44000	Master plan of the project approved. Public hearing conducted. Proposal for Environmental clearance under consideration. Land acquisition in progress.
18.	Development of an all weather and Multipurpose port at Vijaydurg Port Dist. Sindhudurg	Vijaydurg, Maharashtra	7.5	10000	Detailed Project Report under scrutiny. Terms of Reference (ToR) being obtained from MoEF. MoEF has issued moratorium till 31.12.2011 banning infrastructure projects in Sindhudurg & Ratnagiri districts. Matter taken up with MoEF for lifting of moratorium.
19	The demolition of old existing jetty and reconstruction of new jetty of length 169.5 mts. at panaji.	Panaji, Goa	The jetty will cater to low craft passenger vessel and other small crafts. No cargo will be discharged/ loaded at this jetty.	80.2	The demolition of old existing jetty and re-construction of new jetty, work is in progress

20.	Establishing a captive port at Thiruchopuram in Cuddalore district by M/s. Nagarjuna oil corporation Ltd.	Thiruchopuram Tamil Nadu	9.3	3840	Construction work has commenced.
21	5 th berth Railway line at Kakinada Deep Water Port	Kakinada Deep Water Port Andhra Pradesh	-	120	Likely to complete by June 13.
22	Coal Mechanisation System in 5 th berth back up area at Kakinada Deep Water Port	Kakinada Deep Water Port Andhra Pradesh	6.MMT	3000	Likely to complete by June 13.
23	Expansion development and Operation of Gopalpur port.	Gopalpur, Orissa	10 MT- PA	11500	MOEF clearance received on 30.03.2011. Construction activities are in progress. All Weather Direct Berthing port is scheduled for operation from Nov 2013.
24	Development of Port at Astaranga Puri.	Astaranga Puri Orissa	60 MT- PA	85000 Including Connectivity	Concession Agreement concluded, Land allotment, DPR preparation is in progress.
25	Development of Karaikal Port through private investment on BOT basis	Karaikal, Puducherry	Phase . 1 4.0 Phase - II 2.6	4170 21,000	Phase 1 of commercial operations commenced in June 2009 and is currently functional Phase II related works estimated at Rs 2100 Crores are in progress. Upon completion of phase 2, the total handling capacity would be 20.5 million tons per annum.
26	Development of Pondicherry Port through private investment on BOT basis	Pondicherry	Phase . 1 16.2 Phase - II 10.8	27850 N.A	Developer has issued %Notice+ of intent to terminate the Concession Agreement entered for the project.
27	Captive port owned by M/s Chemplast Sanmar, Chennai.	Captive Maritime Terminal facility, Karaikal, Puducherry	0.055	300	Commercial operations commenced in September 2007 and is functioning
28	Development of Ponnani Port under PPP	Ponnani Kerala	-	7630	Work awarded to M/s Malabar Pvt Ltd. And the concession agreement signed on 29/09/2011. EIA studt is in progress

Note For Andhra Pradesh project status as on 31.3.2013

Source: Maritime States/Maritime Boards

**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. Million)	Project Status
1	2	3	4	5	6
1.	Expansion of UTCL jetty at Kovaya	Pipavav (Gujarat)	5	2500	Environment clearance received. Construction approval is to be granted.
2.	Private terminals at Bhogat by USEL.	Bhogat (Gujarat)	10	20000	Environment clearance to be obtained. Land acquisition initiated.
3.	Private jetty at Rozi port- Ruchi Infrastructure, Arcadia shipping etc.	Bedi (Gujarat)	2	150	Environment clearance received and Construction is to be start soon (Pvt -2)
4.	Port terminal facilities at Bagasara	Bagasara (Gujarat)	1	500	EIA initiated. Tenders for PQ are under progress.
5.	Expansion of Cement terminals at Jakhau by sanghi	Jakhau (Gujarat)	8	4500	Environment clearance in process. Land Acquisition is in progress.
6.	Greenfield port development at Chhara	Chhara (Gujarat)	8	12000	DPR Approved. Environment clearance in advance stage.
7.	LNG terminal at Pipavav by SWAN.	Pipavav (Gujarat)	5	15000	DPR Submitted. Commercial terms with GPPL are under discussion.
8.	LNG terminal at Mundra port.	Mundra (Gujarat)	5	30000	Environment clearance received. Technical Studies have been initiated.
9.	Development of Kachhigadh by L&T	Kachhigadh (Gujarat)	5	20000	Land identified. DPR under way.
10.	Multipurpose Terminal Navlakhi- DMCC.	Navlakhi (Gujarat)	4	3000	DPR approved. Applied for extension of validity of Environment Clearance.
11.	SPM at Magdalla by ONGC.	Magdalla (Gujarat)	5	4000	Basic Engineering is in progress. Environment clearance is in process.
12.	New Cement jetty in Kutch	Kharo and kori Creek(Gujarat)	4	3500	Common port facilities for various cement industries is planned and DPR to be prepared
13.	SPM at Magdalla by ONGC.	Magdalla (Gujarat)	4	3500	Environment clearance is in process Basic engineering completed. Detailed Engineering is in progress.
14.	Cement jetty by ABG Cement at Mora village, Surat.	Magdalla (Gujarat)	3	1000	Under Government approval.
15	Multipurpose jetty at Sikka by Reliance	Sikka (Gujarat)	15	20000	Environment clearance obtained. Detailed engineering

Sl. No	Project	State/ Ports Maritime Board	Capacity (Million Tonnes)	Project Cost (Rs. Million)	Project Status
1	2	3	4	5	6
	Industries Ltd.				underway.
16	Expansion of Coal jetty & phase 2 dredging at pipavav	Pipavav (Gujarat)	5	6500	Development envisaged in the DPR submitted for expansion of the port, However detailed implementation plan and DPR for Phase 2 is to be submitted to GMB based on requirements of thermal power plants companies.
17	Greenfield port at Mahuva	Mahuva (Gujarat)	3	4250	DPR under progress
18	Greenfield port at Nargol	Nargol (Gujarat)	10	17500	Selection of developer under approval of GOG
19	Greenfield port at Vansiborsi	Vansiborsi (Gujarat)	8	17730	Pre- Feasibility Report under way.
20	Greenfield port in lieu of Khambhat port	Khambhat (Gujarat)	3	1200	Location shifting is in process at GOG level.
21	Greenfield port in lieu of Dholera	Dholera (Gujarat)	10	10000	Location shifting is in process at GOG level.
22	Captive port facility by M/s. Udangudi Power Corporation Ltd.	Udangudi Thoothukudi Tamil Nadu	6	90830	Port has been notified. Detailed Project Report under preparation.
23	Captive port facility by M/s. NSL Power Ltd.	Vanagiri Nagapattinam Tamil Nadu	5.5	70040	Port has been notified. Detailed Project Report submitted.
24	Captive port facility by M/s. Indian Gas Ltd.	Manappad Thoothukudi Tamil Nadu	6.5	18000	Port has been notified. Quarrying or rock stones required for breakwater construction is in progress.
25	Captive port facility by M/s. NTPC Ltd.	Marakkanam Villupuram Tamil Nadu	13	100000	In principal approval accorded. Reports are awaited.
26	Captive port facility by M/s.Goodearth shipbuilding Ltd.	Silambimangalam in Taluk Cuddalore Tamil Nadu	Shipbuilding	140000	Port has been notified Fencing works are under progress. Financial closure yet to be achieved.
27	Captive port facility by M/s. Sindya power Generting Co Private Ltd	Sirkazhi Taluk Nagapattinam Tamil Nadu	3	50000	In principle approved accorded. Financial closure yet to be achieved.
28	Captive ship repair facility by M/s. Marg Swarnabhoomi Port Private Ltd.	Mugaiyur Kancheepura Tamil Nadu	Ship repair facility	6000	Port has been notified. Coastal land has been allotted.
29	Captive port facility by M/s. PEL Power Ltd.	Kaveri Nagapattinam Tamil Nadu	4	50000	Port has been notified. Studied are being conducted.
30	Captive port facility by M/s. Coastal Tamil Nadu Power Ltd.	Cheyur Kancheepura Tamil Nadu	13	160000	Detailed Project Report submitted and the port limits are yet to be assessed.
31	Captive port facility by M/s. Cuddalore Powergen Corporation Ltd.	Cuddalore Tamil Nadu	4	50000	Acquiring pf private lands under progress.
32	Captive port facility by M/s.IL & FS Ltd.	Parangipettai Tamil Nadu	13	12600	Port has been notified. Consent from TNPCB received.

Sl. No	Project	State/ Ports Maritime Board	Capacity (Million Tonnes)	Project Cost (Rs. Million)	Project Status
1	2	3	4	5	6
33	Captive port facility by M/s. Empee Power and Infrastructure Private Ltd.	Neithavasal Nagapattinam Tamil Nadu	4	50000	In principle approved accorded. Financial closure yet to be achieved
34	Captive port facility by M/s. Tridem port and Power and Infrastructure Private Ltd.	Thirukkuvalai Nagapattinam Tamil Nadu	6.5	6000	Port has been notified. Clearance from Ministry of Environment and Forests awaited.
35	Captive port facility by M/s. Chettinad Power Corporation Ltd.	Tharangambadi Taluk Nagapattinam Tamil Nadu	3.5	75000	In principle approved. Declaration of Port limits under consideration of Government.
36	2nd stage Development of Modern Sea Port	Karwar Karnataka	5	1500	Issue of bid documents is under progress.
37	Development of Modern Sea Port at Tadri in Karnataka coast line.	Tadri Karnataka	34	3000	IDD Nominated KSIIDC as nodal agency Preparation of DPR is under progress.
38	New Haldipur Port	Haldipur Karnataka	18	1900	DPR under progress by MEL Bangalore.
39	Development of Honnavar anchorage port	Honnavar Karnataka	2	200	M/s. Honnavar Port Ltd., is preparing DPR and in the process of obtaining environmental clearamce.
40	Development of Manki port near Honnavar	Manki Karnataka	1	46	M/s. Renuka Sugar is in the process of preparing DPR for construction of captive jetty.
41	7th Berth at Kakinada	Kakinada Deep Water Port Andhra Pradesh	2.5	600	Yet to commence.
42	Fertiliser Mechanisation Plant in 6 th Berth	Kakinada Deep Water Port Andhra Pradesh	5.0	3500	Initial stage
43	Gangavaram port Ltd.	Gangavaram port Ltd Visakhapatnam	16.54 MTPA	168	Commercial Operation started during 2009
44	Development of Machilipatnam port Ltd.	Machilipatnam Andhra Pardesh	31MTPA Phase . 1 200 MTPA Master Plan	50740	Construction work is scheduled to commence upon handling over of land for Port Development by GoAP.
45	VANPIC	Vadarevu Port Andhra Pradesh	24	18420	1. DPR approved by Govt. of AP 2. All clearances including Environmental clearance from MoEF. GOI, obtained 3. Port Construction is awaiting : a) Transfer of lands on lease by Govt.of AP (GoAP) to VANPIC Ports

Sl. No	Project	State/ Ports Maritime Board	Capacity (Million Tonnes)	Project Cost (Rs. Million)	Project Status
1	2	3	4	5	6
					b) Approval of R&R scheme c) Provision by GoAP of External Infrastructure by GoAP
44	Development of Kollam port.	Kollam, Kerala		400	Tender for selecting developer will be opened 26/6/12
45	Development of alappuzha Marina & cargo	Alappuzha Kerala		3851	The consultant has submitted the DFR and the preparation of RFP is in progress.
46	Development of Beypore Port,	Beypore, Kerala		1635	Tender for selecting developer will be opened 03/07/2012.
47	Development of Azhikal port.	Azhikal, Kerala		4630	Tender opened on 15/05/2012. Azhikkal port proposal for developing a cement terminal received. Project report is awaited.

Note For Andhra Pradesh project status as on 31.3.2013

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)	
	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. (Upto Sept.)
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
Kolkata (a)	37.37	63.05	44.97	53.64	58.00	48.85	50.88	49.76	63.73	21.29	28.45	17.34	38.03	5.86
Mumbai	50.36	26.10	150.00	23.50	192.00	146.09	179.58	116.76	176.57	142.05	279.79	149.30	427.60	24.87
JNPT	188.18	70.28	175.17	48.77	324.00	177.94	89.61	38.24	153.69	140.52	341.18	240.21	1559.10	137.58
Chennai	47.81	44.41	72.95	48.98	34.00	58.37	243.00	184.46	136.00	4.44	145.00	81.75	107.00	9.20
Cochin	158.52	139.07	255.65	246.33	191.97	190.93	259.35	160.86	115.08	92.21	93.45	78.47	123.05	3.40
Visakhapatnam	83.00	36.61	39.97	31.44	65.01	75.74	151.00	121.19	190.00	113.45	102.71	57.92	182.34	26.07
Kandla	89.49	38.25	140.87	58.07	115.00	62.64	45.66	52.70	92.27	52.82	166.89	138.44	145.45	28.30
Mormugao	10.10	11.18	22.07	17.52	71.00	31.01	66.29	71.52	108.93	69.17	71.36	46.95	110.00	24.75
Paradip	100.00	42.05	288.00	101.47	276.51	128.19	166.21	81.26	70.00	74.80	127.31	73.73	96.91	55.65
New Mangalore	36.00	25.81	30.00	30.11	34.00	32.48	31.00	24.56	36.00	38.45	36.00	45.50	75.00	8.04
Tuticorin	79.46	63.16	96.87	65.12	220.50	39.03	90.94	172.08	291.97	369.65	201.42	42.63	547.82	3.19
Ennore Port Ltd.	61.00	34.53	70.00	102.43	95.01	50.52	95.00	70.12	60.00	61.92	73.50	80.03	600.00	28.38
Sethusamudram Ship Canal Project	664.22	119.47	1581.07	152.24	161.10	20.98	10.00	6.02	10.01	8.51	4.00	2.12*	6.00	1.42*
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	##
Others (b)	477.26	170.67	598.38	88.50	564.90	161.68	362.86	223.31	673.09	518.08	901.87	579.43	635.00	318.98
Survey Vessels	19.00	0.00	79.00	5.00	10.00	0.00	15.00	15.00	15.00	15.00	0.00	0.00##	0.00	0.00##
Total	2109.27	884.68	3650.97	1143.10	2416.00	1227.8	1861.26	1392.30	2194.72	1724.37	2574.93	1633.70	4654.30	675.69

(a) Includes Haldia and RR Schemes.

(b) Includes DCI, ALHW, R&D 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 Govt. of India and other stakeholders.

App.Outlay: Approved Outlay

##- Not Available

Source : Annual Plan - Port Sector (Deptt. of Shipping)/IPA

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		Others	Total
								Tonnes	TEUs		
1	2	3	4	5	6	7	8	9	10	11	12
Kolkata	2011-12	682	450	0	8	69	0	6818	317	4206	12233
	2012-13	668	158	0	45	42	309	6960	463	3662	11844
	2012-13(P)	374	71	0	6	0	158	3482	230	1739	5830
	2013-14(P)	295	84	0	150	4	209	3726	238	1591	6059
Haldia	2011-12	6582	3943	2346	4939	519	3	2619	115	10064	31015
	2012-13	6196	1715	1976	4502	387	0	2869	137	10439	28084
	2012-13(P)	3452	835	952	2579	203	0	1363	75	4669	14053
	2013-14(P)	2974	1129	842	2732	317	0	1129	60	5762	14885
Paradip	2011-12	15091	6556	16404	5159	4783	0	109	8	6152	54254
	2012-13	16466	1834	21394	4912	4146	0	171	13	7629	56552
	2012-13(P)	8105	1112	8721	2718	1872	0	91	7	3010	25629
	2013-14(P)	9420	2719	12804	3210	1731	0	28	3	4207	34119
Visakhapatnam	2011-12	17428	16243	3189	6874	4551	517	4213	234	14405	67420
	2012-13	15035	12568	2951	6845	2588	1122	4554	247	13377	59040
	2012-13(P)	7831	6645	1513	3455	1566	478	2363	130	6458	30309
	2013-14(P)	6957	6273	1364	3533	1450	549	2533	131	6277	28936
Chennai	2011-12	13290	97	610	351	643	190	30076	1555	10450	55707
	2012-13	13424	52	0	0	422	331	29708	1539	9467	53404
	2012-13(P)	6541	0	0	0	281	40	15515	804	4750	27127
	2013-14(P)	6978	27	0	0	169	172	14602	757	4301	26249
Ennore	2011-12	502	0	12646	465	0	0	0	0	1343	14956
	2012-13	1124	0	14240	685	0	0	0	0	1836	17885
	2012-13(P)	425	0	6298	441	0	0	0	0	833	7997
	2013-14(P)	949	0	10403	196	0	0	0	0	1128	12676
Tuticorin	2011-12	630	33	6050	0	2025	307	9227	477	9833	28105
	2012-13	792	0	6661	0	1051	128	9373	476	10255	28260
	2012-13(P)	407	0	3233	0	645	87	4546	240	5119	14037
	2013-14(P)	232	0	3538	0	591	47	5044	252	4641	14093
Cochin	2011-12	14084	0	34	0	430	0	4715	337	827	20090
	2012-13	13896	0	28	0	353	0	4607	335	961	19845
	2012-13(P)	7118	0	0	0	184	0	2435	177	397	10134
	2013-14(P)	7679	0	0	0	83	0	2456	178	629	10847
New Mangalore	2011-12	22245	3036	0	4022	825	58	645	45	2110	32941
	2012-13	24301	2616	2553	4357	536	204	692	48	1777	37036
	2012-13(P)	11090	1474	1108	1674	259	0	347	25	784	16736
	2013-14(P)	12189	1177	1715	2657	314	33	367	25	924	19376
Mormugao	2011-12	923	29370	1163	5669	93	0	279	22	1552	39049
	2012-13	823	7421	768	6605	78	60	213	20	1725	17693
	2012-13(P)	457	7421	640	3058	78	0	90	9	919	12663
	2013-14(P)	252	0	0	3487	36	0	112	10	1272	5159
J. L. Nehru	2011-12	4845	0	0	0	4	19	58233	4317	2629	65730
	2012-13	4125	0	0	0	0	0	57912	4259	2453	64490
	2012-13(P)	2101	0	0	0	0	0	29329	2155	1222	32652
	2013-14(P)	2455	0	0	0	0	12	27169	2061	1294	30930
Mumbai	2011-12	30611	0	4622	0	404	894	551	56	19104	56186
	2012-13	34065	0	4018	0	512	31	828	58	18584	58038
	2012-13(P)	17162	0	2260	0	283	21	404	30	8658	28788
	2013-14(P)	17163	0	1837	0	104	0	215	19	8262	27581
Kandla	2011-12	46938	991	4064	161	6058	1291	2791	168	20207	82501
	2012-13	54355	1006	4064	374	4624	3783	1934	118	23479	93619
	2012-13(P)	25812	411	1937	193	2553	1610	914	58	11064	44494
	2013-14(P)	26959	435	3978	149	2168	1784	452	29	10026	45951
All Ports	2011-12	173851	60719	51128	27648	20404	3279	120276	7651	102882	560187
	2012-13	185270	27370	58653	28325	14739	5968	119821	7713	105644	545790
	2012-13(P)	90875	17969	26662	14124	7924	2394	60879	3940	49622	270449
	2013-14(P)	94502	11844	36481	16114	6967	2806	57833	3763	50314	276861

Source: Major Ports and Indian Ports Association.

P : Provisional

Annex - III

Commodity Composition of Traffic Handled at Non- Major Ports.

(000 Tonnes)

Maritime Status / UTs	Period	POL	Iron Ore	Building Material	Coal	Fertiliser & FRM	Others	Total
Gujarat	2011-12	151487	6919	9022	38372	7185	46065	259050
	2012-13	164670	7635	13857	55875	5617	40163	287817
	April - Sept 2012-13	82234	3336	1036	22928	2946	23489	135969
	2013-14	83128	3089	3785	34100	3104	25400	152606
Maharashtra	2011-12	0	6362	2490	7589	230	3276	19947
	2012-13	0	7882	2044	10363	0	3909	24198
	April - Sept 2012-13	0	3888	837	4880	0	1531	11136
	2013-14	0	3226	854	5019	0	2185	11284
Andhra pradesh	2011-12	3508	2974	859	23512	7035	7745	45633
	2012-13	1757	977	1002	30740	4895	12457	51828
	April - Sept 2012-13	1009	678	595	13907	2949	5767	24905
	2013-14	1236	830	729	17038	3613	7067	30513
Goa	2011-12	0	14305	0	165	0	0	14470
	2012-13	0	3276	0	113	0	0	3389
	April - Sept 2012-13	0	3217	0	0	0	0	3217
	2013-14	0	3276	0	55	0	0	3331
Tamil Nadu	2011-12	1114	0	7	0	46	43	1210
	2012-13	855	0	6	0	29	43	933
	April - Sept 2012-13	424	0	0	0	20	30	474
	2013-14	365	0	18	0	0	23	406
Karnataka	2011-12	0	0	19	0	29	544	592
	2012-13	65	0	54	0	58	429	606
	April - Sept 2012-13	25	0	46	0	32	176	279
	2013-14	49	0	4	0	31	122	206
Others states / Uts #	2011-12	213	56	469	9402	1217	1486	12843
	2012-13	620	2167	528	13547	611	1981	19454
	April - Sept 2012-13	294	612	424	6863	274	759	9226
	2013-14	210	1806	272	6941	271	1150	10650
All Major Ports	2011-12	156322	30616	12866	79040	15742	59159	353745
	2012-13	167967	21937	17491	110638	11210	58982	388225
	April - Sept 2012-13	83986	11731	2938	48578	6221	31752	185206
	2013-14	84988	12227	5662	63153	7019	35947	208996
<p>Note : All figures of 2012-13 are provisional. For Andhra Pradesh, Commodity-wise traffic handled during April-September 2013-14 has been estimates on the basis of commodity-wise traffic handled during corresponding period 2012-13.</p> <p># : Consists of Pondicherry, Orissa, Kerala, Andaman & Nicobar Islands and Lakshadweep Islands. No traffic was handled at ports of Daman & Diu.</p>								

Commodity-Wise Capacity Available at Major Ports

(In Million Tonnes)

Commodities	KDS	HDC	PPT	VPT	EPL	ChPT	V.O.C.	CoPT	NMPT	MoPT	MbPT	KPT	JNPT	Total
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
POL														
As on 31.3.08	3.96	17.00	6.00	17.65	-	11.80	2.30	18.70	22.00	1.50	32.00	46.00	5.50	184.41
As on 31.3.09	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	62.83	5.50	219.24
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	62.83	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	66.60	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	66.60	5.50	278.90
Iron Ore														
As on 31.3.08	-	6.00	4.50	12.50	-	8.00	-	-	7.50	24.30	-	-	-	62.80
As on 31.3.09	-	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	28.30	-	-	-	66.80
As on 31.3.11	-	8.00	4.50	12.50	6.00^	8.00	-	-	7.50	33.00	-	-	-	79.50
As on 31.3.12	-	8.00	4.50	12.50	6.00	8.00	-	-	7.50	33.00	-	-	-	79.50
As on 31.3.13	-	6.00	4.50	12.50	6.00	8.00	-	-	7.50	27.50	-	-	-	72.00
Coal														
As on 31.3.08	-	7.00	20.00	-	13.00	-	6.25	-	-	-	-	-	-	46.25
As on 31.3.09	-	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	-	-	-	-	65.95
As on 31.3.13	-	7.00	20.00	-	21.00	-	12.55	-	5.40	-	-	-	-	65.95
Fertiliser														
As on 31.3.08	-	-	7.50	1.00	-	-	-	0.60	-	-	-	-	-	9.10
As on 31.3.09	-	-	7.50	1.00	-	-	-	0.60	-	-	-	-	-	9.10
As on 31.3.10	-	-	7.50	1.00	-	-	-	0.60	-	-	-	-	-	9.10
As on 31.3.11	-	-	7.50	1.00	-	-	-	0.80	-	-	-	-	-	9.30
As on 31.3.12	-	-	7.50	1.00	-	-	-	0.80	-	-	-	-	-	9.30
As on 31.3.13	-	-	7.50	1.00	-	-	-	0.80	-	-	-	-	-	9.30
Break-Bulk Cargo														
As on 31.3.08	5.70	12.70	18.00	28.30	-	16.10	7.20	4.76	14.00	7.25	9.20	13.00	0.80	137.01
As on 31.3.09	6.30	12.70	18.00	29.38	-	16.80	9.26	4.76	14.70	7.25	9.80	14.80	0.80	144.55
As on 31.3.10	6.44	12.70	23.50	29.38	-	17.92	10.17	6.76	14.70	7.25	9.80	14.97	0.90	154.49
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	6.74	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	19.42	0.90	179.00
Container														
As on 31.3.08	4.90	4.00	-	1.70	-	17.45	5.00	4.31	-	-	3.50	3.60	48.04	92.50
As on 31.3.09	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	57.60@	120.85
As on 31.3.11	5.73	4.00	-	2.50	-	42.00#	5.00	12.50**	-	-	1.00*	7.20	57.60@	137.53
As on 31.3.12	5.90	4.00	-	2.68	-	42.00	5.00	12.50	-	-	1.00	7.20	57.60@	137.88
As on 31.3.13	5.90	4.00	-	2.68	-	42.00	5.00	12.50	-	-	1.00	7.20	59.48 @	139.76
TOTAL														
As on 31.3.08	14.56	46.70	56.00	61.15	13.00	53.35	20.75	28.37	43.50	33.05	44.70	62.60	54.34	532.07
As on 31.3.09	15.76	46.70	71.00	62.23	16.00	55.75	22.81	28.37	44.20	33.05	43.70	77.24	57.96	574.77
As on 31.3.10	15.90	46.70	76.50	62.27	16.00	71.32	23.72	30.37	44.20	37.05	43.70	85.00	64.00	616.73
As on 31.3.11	16.35	50.70	76.50	64.93	31.00	79.72	27.04	40.98	45.57	41.90	44.53	86.91	64.00	670.13
As on 31.3.12	17.14	50.75	80.30	66.33	31.00	83.19	33.34	41.86	50.97	41.90	44.53	91.22	64.00	696.53
As on 31.3.13	17.14	46.75	102.30	67.33	31.00	85.59	33.34	44.66	76.77	36.40	44.53	93.22	65.88	744.91

Figure in the parenthesis indicate the number of berths. BJ Barge jetties, T-Transhippers, A-Anchorage, SBM-Single Buoy Mooring

@ : Capacity of JNP Container Terminal (3berths), NSICT (2berths), GTIPL (3berths) & 1 shallow water berth has been taken as 16.88 MT, 15.0 MT, 26.40 MT and 1.20 MT respectively

Capacity of one shallow water berth at JNPT is .90 MT for dry bulk cargo.

Capacity of Iron Ore berth has been taken as 6.0MT at Ennore Port. After full fledged commissioning, balance capacity of 6.0MT 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 1.0MT. Berth

ID are used as holding berth for MbPT crafts & no capacity has been accounted.

Source : Development Wing - Department of Shipping.

Annex-iv(b)

PROVISIONAL COMMODITY WISE CAPACITY OF MAJOR PORTS AS ON 31.3.2013

(IN MILLION TONNES)

Sl no	Commodity	Kolkata	Haldia	Paradip	Vizag	Chennai	Ennore	Tuticorin	Cochin	New Mangalore	Mormugao	Mumbai	Kandla	J.N.P.T	Total
1.	P.O.L	4.50+4.0 (7)+A	17.00 (3+2BJ)	43.00(1+3)+SBM	17.65 (4)+SBM	17.67 (2)	3.00 (1)	2.30 (1)	19.01.70 (3)+SBM	49.17 (5+ISPM)	1.50 (1)	32.00 (5)	66.60 +0.8 (8+3SBM) A	5.50 (2)	278.90+4.80 (43+8SBM+2BJ)
2.	IRON ORE		6.00 (2)	4.50 (1)	12.50 (1)	8.00 (1)	6.00(1)			7.50 (1)	27.50 (1)+3Trans				72.00 (8+3Trans)
3.	Coal (Thermal)		7.00 (2)	20.00 (2)			21.00 (3)	12.55 (3)		5.40 (1)					65.95 (11)
4.	Fertilizer			7.50 (2)	1.00 (1)				0.80 (1)						9.30 (4)
5.	Gen. Break Bulk Cargo	6.74+0.51 (22)+A	12.75 (8)	27.30 (9)	33.5 (15)	17.92 (14)	1.00 (1)	13.49 (10)	12.35 (12)	14.70 (8)	7.40 (4)	11.53+6.0 (25)A	19.42 (12)	0.90 (1)	179.11+6.50 (141)+A
6.	Containers	5.90 (4)	4.00 (2)		2.68 (1)	42.00 (7)		5.00 (1)	12.50 (3)			1.00 (1)	7.20 (2)	59.48 @ (9)	139.76 (29)
Total		17.14+4.51 (33)+A	46.75 (17+2BJ)	102.30 (15+3SBM)	67.33 (22)	85.59 (24)	31.00 (6)	33.34 (15)	44.66 (18+1SBM)	76.77 (15+1SPM)	36.40 (6+3Trans)	44.53+6.0 (31)+A	93.22+0.8 (22+3SBM) +A	65.88 (12)	744.91+11.3 (236)+8SBM+Trans+2BJ)+A

Figure in the parenthesis indicate the number of berths. BJ Barge jetties, T-Transhippers, A- Anchorages, SBM- Single Buoy Mooring

@ Capacity of JNP container terminal (3 berths), NSICT (2 berths) GTIL (3 berths) and shallow water berth (1 no) has been taken as 16.88 MT, 15.00 MT, 26.40 MT and 1.20 MT respectively. Capacity of one shallow water berth at JNPT is 0.90 MT for dry bulk cargo.

Capacity of Chennai Container Terminal I (4 berths) and II (3 berths) has been taken as 24MT and 18MT respectively.

Capacity of Iron Ore berth has been taken as 6.0MT at Ennore Port. After full fledged commissioning, balance capacity of 6.0MT 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 1.0MT. Berth No. 6, 7/8 ID are used as holding berths for MbPT crafts and no capacity has been accounted.