भारत के पत्तन क्षेत्र का अदयतन

UPDATE ON INDIAN PORT SECTOR

(30.09.2015)

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 has been bringing out the biannual publication "*Update on Indian Port Sector.*" Present issue (upto September, 2015) is twenty-sixth in the series of the publication "*Update on Indian Port Sector*". The last issue contained data up to March, 2015.

2. 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, 2015. The list of private sector/captive/joint sector port projects under implementation/consideration at Major Ports and Non-Major Ports have also been included. The cooperation extended by the concerned source authorities is gratefully acknowledged.

(Rajive Kumar)

January , 2016

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UPDATE ON INDIAN PORT SECTOR

(UP TO 30.09.2015)

C O N T E N T S

1. INDIA'S POSITION IN WORLD ECONOMY

1.1 India is set to emerge as the world's fastest-growing major economy by 2015 ahead of China, as per the recent report by the World Bank. India's Gross Domestic Project (GDP) is expected to grow at 7.5 per cent in FY 2015-16, as per the report. The improvement in India's economic fundamentals has accelerated in the year 2015 with the combined impact of strong government reforms, RBI's inflation focus supported by benign global commodity prices. According to IMF World Economic Outlook April, 2015, India ranks seventh globally in terms of GDP at current prices and is expected to grow at 7.5 per cent in 2016. India's economy has witnessed a significant economic growth in the recent past, growing by 7.3% per cent in FY 2015 as against 6.9% per cent in FY 2014. The size of the Indian economy is estimated to be Rs. 129.57 trillion (US$ 2.01 trillion) for the year 2014 compared to Rs. 118.23 trillion (US $ 1.84 trillion) in 2013. The steps taken by the government in recent time have shown positive results as India's gross domestic product (GDP) at factor cost at constant (2011-12) prices in 2014-15 is Rs. 106.4 trillion (US$ 1.596 trillion), as against 99.21 trillion (US$ 1.488 trillion) in 2013-14, registering a growth of 7.3 per cent. The economic activities which witnessed significant growth were 'financing, insurance, real estate and business services' at 11.5 per cent and 'trade, hotels, transport, communication services' at 10.7 per cent.

RECENT TRENDS IN CARGO TRAFFIC AND POLICY INITIATIVES

1.1.2 **Table 1** gives the trends in cargo at Indian ports and related parameters of Indian and world trade.

Table 1: Trends in Cargo handled at Indian Ports and related parameters (in %)

Parameters	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	April-September	
							2014-15	2015-16
A : Trends in India's Select : Macro Parameters								
I. Total Cargo	14.2	4.2	3.2	2.2	4.1	8.2	7.2	1.9
(a) Major Ports	5.7	1.6	-1.7	-2.6	1.8	4.7	3.8	4.1
(b) Non Major Ports	35.5	9.1	12.2	9.7	7.5	13.0	11.8	-1.0
II.GVA overall	n.a	n.a	n.a	n.a	6.6	7.2	7.9	7.2
(a) Agriculture	n.a	n.a	n.a	n.a	3.7	0.2	2.4	2.0
(b) Industry	n.a	n.a	n.a	n.a	4.5	6.1	7.6	6.7
(c) Services	n.a	n.a	n.a	n.a	9.1	10.2	9.6	8.8
III. Foreign Trade								
(a) Export in $ value	-3.5	40.5	21.8	-1.8	4.7	-1.2	4.97	-17.65
(b) Import in $ value	-5.0	28.2	32.3	0.3	-8.3	-0.6	1.57	-14.16

Table 1: Trend in Cargo handled at Indian Ports and related parameters (in %)

(Contd.)

B : Trends in Select : Global Indicators								
	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	April-September	
IV. World Output							2014-15	2015-16
(a) Advanced Economies	-3.4	3.1	1.7	1.2	1.1	1.8	2.0F	2.2f
(b) Developing Economies	3.1	7.5	6.3	5.2	5.0	4.6	4.0F	4.5f
V. World Economic Growth	-2.2	4.1	2.8	2.2	2.4	2.5	2.5F	-
(a) Advanced Economies	-3.8	2.6	1.4	1.1	1.3	1.6	1.9F	-
(b) Developing Economies	2.4	7.9	6.0	4.7	4.8	4.5	4.1F	-
(c) Transition Economies	-6.6	4.5	4.7	3.3	2.0	0.9	-2.6F	-
VI. World Trade Volume (Goods)	-11.8	14.3	6.7	2.5	3.0	3.1	3.0F	3.9f
VII. Export Volume growth (Goods)								
(a) Advanced Economies	-13.2	14.6	5.7	1.6	2.5	3.2	2.8F	3.1f
(b) Developing Economies	-8.4	14.4	7.5	4.9	4.2	2.9	3.5F	4.6f
VIII. Import Volume (Goods)								
(a) Advanced Economies	-13.4	13.4	5.2	0.2	1.7	3.3	3.7F	4.0f
(b) Developing Economies	-9.5	15.4	10.5	5.5	4.7	2.7	1.5F	4.3f
IX. World Seaborne Trade*	-5.0	7.4	4.3	4.6	3.4	3.3	NA	NA
(a) Goods Loaded	-4.5	7.0	4.5	4.7	3.4	3.4	NA	NA
(b) Goods Unloaded	-5.5	7.8	4.2	4.4	3.4	3.2	NA	NA

I. Based on data from Major Ports and Non Major Ports

II. Figures - 2013-14 onwards based on Press Release of Gross Value Added (GVA) at Factor Cost (2011-12 Prices), Central Statistical Office, dated 30.11.2015. Comparable figures for the back series are not available.

III. Based on Department of Commerce, DGCI&S and RBI Bulletin

IV,VI, VII & VIII Based on World Economic Outlook, October ,2015, IMF;

V & IX. Based on Review of Maritime Transport, 2015(November), UNCTAD

Note : MT: Million Tonnes; For item Nos IV, VI, VII &VIII year 2009-10 refers to calendar year 2009 and so on; **F** refers to forecast for 2015 and **f** refers to forecast for the year 2016;

* growth in total goods loaded plus unloaded; NA ; Not Available (P) Provisional

Selected Emerging Trends Affecting Seaborne Trade

1.1.3 Although the responsiveness of trade to GDP growth may have moderated over recent years, demand for maritime transport services and seaborne trade volumes continue to be shaped by global economic growth and the need to carry merchandise trade.

1.1.4 The volume of world seaborne shipments (loaded) expanded by 3.4 per cent in 2014, that is, at the same rate as in 2013. Additions to volumes exceeded 300 million tonnes, taking the total to 9.84 billion, or around four fifths of total world merchandise trade. Dry cargo

was estimated to have accounted for over two thirds of the total, while the share of tanker trade, including crude oil, petroleum products and gas was estimated to have slightly declined from nearly 30.0 per cent in 2013 to 28.7 per cent in 2014.

1.1.5 Developing countries continued to contribute larger shares to international seaborne trade. Their contribution in terms of global goods loaded was estimated at 60 per cent, while their import demand as measured by the volume of goods unloaded reached 61 per cent.

1.1.6 Over the years developing countries have become major importers and exporters and a driving force underpinning seaborne trade flows and demand for maritime transport services. They are no longer only sources of supply of raw materials, but also key players in globalized manufacturing processes and a growing source of demand. In terms of regional influence, Asia continued to dominate as the main loading and unloading area in 2014, followed by the Americas, Europe, Oceania and Africa.

1.1.7 The impact of the drop in oil price levels since June 2014 extends beyond the energy markets and the world economy to also affect shipping and seaborne trade, in particular tanker trade. Indirect impacts are felt through changes in the areas of activity and sectors that generate the demand for maritime transport services. These include changes in production costs, economic growth, income and purchasing power of oil producers/exporters and consumers/importers, terms of trade, and investments in oil and gas, as well as investments in alternative fuels and fuel efficient technologies. Meanwhile, direct impacts on shipping and seaborne trade are reflected in lower fuel and transport costs. Ship bunker fuel costs have fallen significantly over the past few months. Lower fuel costs reduce ship operatorsôexpenditure and rates paid by shippers. This, in turn, can stimulate the demand for maritime transport services and increase seaborne cargo flows.

Table 2 : Developments in International Seaborne Trade (Million Tonnes Loaded)

Year	Oil	Main Bulk#	Other Dry Cargo	Total
2000	2163	1295	2526	5984
2006	2698	1814	3188	7700
2007	2747	1953	3334	8034
2008	2742	2065	3422	8229
2009	2642	2085	3131	7858
2010	2772	2335	3302	8409
2011	2794	2486	3505	8784
2012	2841	2742	3614	9197
2013	2829	2923	3762	9514
2014	2826	3112	3903	9842

iron ore, grain, coal, bauxite/alumina and phosphate rock Source: Review of Maritime Transport,2015,UNCTAD

Crude Oil and Petroleum products

Crude oil

1.1.8 While oil prices are an important market signal, other factors are also increasingly shaping the tanker trade landscape. These include the response of shale oil producers to the lower oil price levels, policy decisions by members of the Organization of the Petroleum Exporting Countries, geopolitical developments, and political tensions. Reflecting subdued growth in global oil consumption in 2014 (+0.8 per cent) (International Energy Agency, 2015), crude oil shipments were estimated at 1.7 billion tons in 2014, a drop of 1.7 per cent over the previous year. The firm import demand of Asian countries, in particular China and India, the effect of lower oil prices on stock building, and increased oil. Supply (+2.5 per cent) have combined to offset the limited growth elsewhere and the decline in import volumes of the United States and Europe. In 2014, crude oil imports into the United States declined by nearly 12 per cent to reach 4.5 million barrels per day, while imports into China increased by 9.8 per cent (5.6 million barrels per day) in tandem with its growing refinery capacity, strategic petroleum reserves requirements as well as the supporting effect of lower oil prices. This trend is likely to continue given the expected further growth in Chinaôs refinery capacity and petroleum reserve requirements. Underpinned by a rising national refinery capacity, India has over recent years emerged as an important crude oil importer. On the export side, members of the Organization of the Petroleum Exporting Countries maintained the production levels to retain market share. African crude exports contracted by 4.6 per cent due to technical problems in Angola, infrastructure-related disruptions in Nigeria as well as conflicts in Libya.

Refined petroleum products

1.1.9 Developments in refinery capacities can significantly shape crude and product trade patterns. In 2014, the global refinery capacity increased by 1.4 per cent, driven mainly by growth in Brazil, China, Singapore and Western Asia. According to UNCTADôs estimates, which include gas trade, the volume of petroleum products and gas loaded in 2014 increased by 2.3 per cent and reached 1.11 billion tonnes. Mean while, data from Clarksons Research indicate that petroleum products are estimated to have increased by 1.7 per cent in 2014 and reached 977 million tons, while gas trade increased by 3.9 per cent and totaled 319 million

tonnes. On the supply side, increasing exports from Western Asia (+6.3 per cent), the United States (+4.0 per cent) and the economies in transition (+3.6 per cent) helped support growth. Imports into Latin America (+11.8 per cent) and developing Asia (other than China) (+6.3 per cent) have been the main driver of growth. Meanwhile, imports into Africa, Australia, India, Japan and the Republic of Korea are estimated to have remained steady, while imports into China, the United States and Europe declined by 25 per cent, 12.5 per cent and 1.5 per cent, respectively. During recent years, China has moved away from being a net importer of oil products. Together, Chinaøs domestic oversupply of petroleum products, growing refinery capacity and reduced national demand have contributed to reducing import needs and increasing exports. Refinery capacity in Western Asia has also been on the rise, reflecting growing domestic requirements as well as export needs. Although the capacity growth was limited in the United States, throughput increased by 3.5 per cent, taking the countryøs global share to over 20 per cent in 2014.

Natural gas and liquefied gases

1.1.10 Liquefied natural gas (LNG) increased its share of global gas trade carried by sea in 2014. Volumes increased by 2.5 per cent, taking the total to 333.3 billion cubic metres. Growth was driven by higher import demand in China, India, the United Kingdom, Brazil and Mexico. Japan, the largest world importer, increased imports by 1.4 per cent, while the Republic of Korea, the second largest importer, recorded a decline of 5.7 per cent as inventory restocking was completed. Rising import demand in developing Asia and America was supported by growing power generation, petrochemical and heating demand, as well as expanded regasification capacity in China and India.

1.1.11 Major exporters, including Qatar, reduced exports, while others such as Algeria, Australia, Malaysia and Papua New Guinea recorded increases in export volumes. Meanwhile, LNG imports into the United States have been curtailed by the shale revolution. However, the country has the potential to eventually emerge as an important gas exporter. Overall, firm global demand for LNG, led by the Asian economies, is expected to support growth in LNG carrier demand, while environmental regulations and air emission controls may lead to a growing role for gas. Some observers predict that LNG volumes will double by 2020, with Australia emerging as a world leading exporter together with other producers such as the Russian Federation, the United States, Canada and East Africa. These developments will

affect demand for gas carriers and further shape LNG trade flows and patterns. Global LPG trade is estimated to have increased by 12.7 per cent in 2014 to reach 71 million tons. Growth was largely supported by the expansion of shale production in the United States and LPG exports. Imports of LPG into China and India remained firm and contributed to raising long-haul trades and helping absorb more gas carrier capacity.

(b) Dry cargo trade: Major and minor dry bulks and other dry cargo

1.1.12 The import demand of emerging developing economies, in particular China and India, remained the main driver of growth in dry bulk cargo shipments in 2014. During the year, the increase in world seaborne dry bulk shipments was estimated at 5.0 per cent, a slower rate than the previous four years. Growth was underpinned by the strong expansion in iron ore trade (+12.4 per cent) which accounted for about 30.0 per cent of all dry bulk cargo and reached 1.34 billion tons. In contrast, coal trade shipments were estimated to have increased by a modest 2.8 per cent, a much slower rate than the double-digit growth recorded in 2012 (+12.3 per cent) Shipments of the five major bulk commodities increased by 6.5 per cent, while the volume of minor bulk commodities is estimated to have increased by 2.0 per cent, reaching 3.1 billion tons and 1.43 billion tons, respectively. Exports of dry bulk commodities such as bauxite, nickel ore, iron ore and coal were constrained by, among other factors, bans on mining activities, restrictions on exports, weather patterns, regulatory measures and policies seeking to promote national producers and industries.

Coal shipments

1.1.13 Growth in world coal shipments (thermal and coking) decelerated to 2.8 per cent with total volumes estimated at 1.2 billion tons. Thermal coal exports, which accounted for over two thirds of coal trade in 2014, are estimated to have increased by 3.8 per cent and reached 950 million tons. Coking coal shipments fell marginally (ð 0.8 per cent) to 262 million tons, owing mainly to reduced import demand from China (Dry Bulk Trade Outlook, 2015a). China was the main engine fuelling the rapid expansion of world seaborne coal trade over the past decade, with its share of global coal shipments reaching 20.0 per cent in 2014, up from 2.0 per cent in 2005. An estimated 10.0 per cent drop in Chinaôs coal imports in 2014 may have a significant impact on dry bulk shipping demand. Factors contributing to the drop in Chinaôs imports include, among others, the falling import demand, which reflects Chinaôs regulations on saleable coal use, a slowdown in steel production, coal import taxes and

quality limits, efforts to protect the domestic coal mining industry, hydroelectric power production and government initiatives to reduce air pollution. Elsewhere, imports into the European Union have also dropped and are expected to further depress as member States comply with the Large Combustion Plant Directive. The Directive contributed to reducing coal emissions by 5.0 per cent between 2008 and 2013, as some stations have already been closed. Reflecting its growing steel production, Indiaôs coking coal imports are estimated to have grown by 24.3 per cent, while thermal coal imports grew by 7.1 per cent. On the export side, total thermal coal exports from Indonesia dropped by 1.7 per cent, while exports from the United States fell by 33.7 per cent, owing in particular to rising mining production costs, lower international coal prices and, generally, weaker global demand. Coking coals exports from the main exporters, including Canada, the Russian Federation and the United States, also declined in 2014, with the exception of exports from Australia (+3.6 per cent).

Iron ore shipments

1.1.14 Supported by increased production and exports from Australia, seaborne iron ore trade is estimated to have grown by 12.4 per cent, taking the total to 1.34 billion tons in 2014. While growth in Chinaôs steel production decelerated in 2014, its iron ore imports remained robust due to lower international iron ore prices and the ample supply from Australia. The cheaper and higher quality imported iron ore displaced domestic supply. There are significant concerns, however, about the long-term developments in Chinaôs steel industry and related implications for dry bulk shipping. On the positive side for shipping, the increased Indian import demand may indicate the potential of India to further rely on iron ore imports to support its growing steel production sector. Indiaôs iron ore imports are currently expected to grow by 23 per cent in 2015. Shipments from Australia are estimated to have increased by 24.2 per cent and accounted for over half of global iron ore exports in 2014. Exports from Brazil, which accounted for 25.3 per cent of world iron ore shipments, increased by 5.4 per cent. Exports from Sierra Leone grew by approximately 51.0 per cent to reach 18.1 million tons despite the negative impact of the Ebola outbreak on mining activities. Looking forward, while, in the short term, iron ore shipments are expected to continue to grow, concerns relating to a slowdown of Chinaôs steel industry and import demand are causing uncertainty in the outlook for bulk carrier demand. Additionally, while lower iron ore prices stimulated iron ore trade in 2014, the sharp fall in prices raises concerns about the ability of some miners to continue production at a loss.

Dry cargo: Minor bulks

1.1.15 Growth in global shipments of minor bulk commodities are estimated to have decelerated to 1.8 per cent in with total volumes reaching 1.43 billion tons. Manufactures (steel and forest products) accounted for 41.9 per cent of the total followed by metals and minerals (35.4 per cent) and agribulks (22.8 per cent). While manufactures and agribulks each increased by 6.0 per cent in 2014, metals and minerals declined by 3.0 per cent. Growth in manufactures reflected the firm increase in Chinese steel production and export growth supported by a tax rebate on some products as well as weaker domestic steel demand. Exports of metals and minerals were constrained by reduced Indonesian exports of nickel ore following the implementation of the export ban in January 2014. Chinaôs nickel ore imports are increasingly sourced from the Philippines, which have come to dominate the international nickel ore market in the past year. The drop in metals and minerals is also reflective of the fall in anthracite shipments resulting from a drop in Viet Namôs exports.

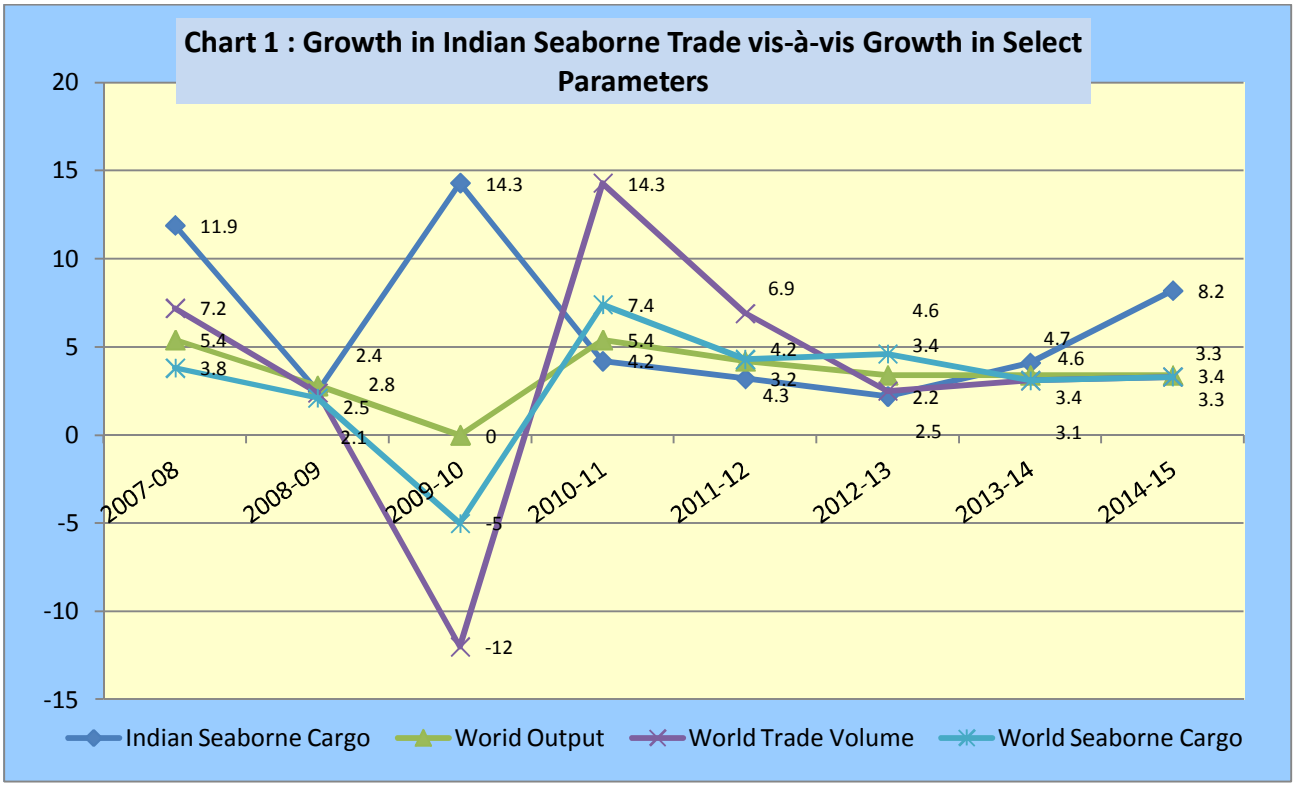
Other dry cargo: Containerized trade

1.1.16 In 2014, global containerized trade was estimated to have increased by 5.3 per cent and reached 171 million TEUs. Global growth was boosted by the recovery on the headhaul journeys (peak legs) of the major Eastï West trans- Pacific and Asiaï Europe trade lanes. Partly reflecting the recovery in the United States and the improved prospects for Europe, containerized trade volumes carried on the Asiaï Europe and trans-Pacific peak legs are estimated to have increased by 7.5 per cent and 6.3 per cent respectively. In comparison, and reflecting a weaker import demand in Asia, trade volumes on backhaul journeys remained weak. Weaker demand for imports from Europe and North America does not necessarily reflect a drop in the overall import demand, as imports into Asia often include waste and other residual products. Volumes on the westbound leg of the trans-Pacific route contracted while shipments on the eastbound leg of the Asiaï Europe trade route increased only marginally. The recovery on the main lane Eastï West routes does not, however, reveal the changing patterns of global demand. The total mainlane container trade is estimated to have grown by 9.0 per cent between 2007 and 2014 while trade volumes on the non main lane trades are said to have expanded by 45 per cent during the same period. Consequently, the share of world trade held by the main lane trades fell from 36.0 per cent in 2007 to 30.0 per cent in 2014. At the same time, intraregional (led by intra-Asian trade) and Southï South trade accounted for 40 per cent of global containerized volumes in 2014, followed by flows on the

main lane Eastï West (30 per cent), Northï South (17 per cent) and secondary Eastï West trade routes (13 per cent).

1.2 India: Seaborne Cargo Traffic

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



1.3 Cargo Traffic at Indian Ports

1.3.1 During the first half (April-September) of 2015-16, Major and Non-major Ports in India have accomplished a total cargo throughput of 525.50 million tonnes reflecting an increase of 1.9% over the same period of 2014-15.(Table 3). Non major portsõ cargo growth was negative (-1.0%). The growth in cargo handled at Major ports in the first half of 2015-16 was 4.1%.

1.3.2 Growth in advanced economies which are a major market for Indian merchandise trade has increased from 1.4% in 2013 to 1.6% for 2014. Indiaûs Gross Value Addition (GVA) at constant prices (Base year 2011-12) exhibited a growth of 7.2% in first half of 2015-16 as against 7.9% in the same period of the previous year. Series of judicial interventions leading to ban/restrictions on iron ore exports resulted in decline in its export.

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

Table : 3 Trends in Cargo Handled at Major & Non-Major Ports
(Million Tonnes)

Major/Non-Major	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15(P)	April-September	
									2014-15(P)	2015-16(P)
Major Ports	519.32	530.81 (2.2)	561.1 (5.7)	570.08 (1.6)	560.19 -(1.7)	545.84 -(2.6)	555.49 (1.8)	581.33 (4.7)	287.74 (3.8)	299.58 (4.1)
Non-Major Ports	206.39	213.24 (3.3)	288.90 (35.5)	315.29 (9.1)	353.74 (12.2)	387.93 (9.7)	416.96 (7.5)	471.19 (13.0)	228.14 (11.8)	225.92 -(1.0)
All Ports	725.71	744.05 (2.5)	850.00 (14.2)	885.37 (4.2)	913.93 (3.2)	933.77 (2.2)	972.45 (4.1)	1052.52 (8.2)	515.88 (7.2)	525.50 (1.9)

1.4 Cargo Traffic at Major Ports

1.4.1 The volume of seaborne cargo traffic handled by ports is mainly shaped by the levels and changes in both the global and domestic activity. Cargo traffic at Indiaûs 12 major ports during first six month (April-September) of 2015-16 was 299.58 million tonnes compared to 287.74 million tonnes during April-September of 2014-15 achieving a growth of 4.1%.

1.4.2 During first six month (April-September) of 2015-16, Mormugao recorded highest growth in traffic of 28.0% followed by Haldia Dock Complex (22.3%), Chidambaranar (18.8%), Kolkata Dock System (14.3%), Kamarajar (9.1%), Kandla (8.3%). Growth in traffic handled by Paradip and Mumbai during first half of 2015-16 over the corresponding period of 2014-15 was 5% or less in each case. Major ports which recorded **negative growth** in traffic during first six month (April-September) of 2015-16 were Visakhapatnam (9.7%), NMPT (7.1%), Chennai (3.4%), Cochin (0.2%) and JNPT (0.1%).

1.4.3 Amongst the Major Ports, Kandla Port handled the maximum Cargo of 50.4 million tonnes with a share of 16.8% in total cargo handled at major ports during first six

month (April-September) of 2015-16, followed by Paradip (12.0%), JNPT (10.8%), Mumbai (10.4%), Vishakhapatnam (9.2%), Chennai (8.6%), Chidambaranar (6.2%), NMPT (5.7%), Haldia Dock Complex (5.7%) and Kamarajar (5.3%). Cochin, Kolkata Dock System (KDS) and Mormugao each had a share of less than 5% in the total cargo handled by Major ports during (April-September) of 2015-16. **(Table 4)**.

Table 4 : Traffic Handled at Major Ports (Thousand Tonnes)

Ports	2012-13	2013-14	2014-15(P)	April-September (P)		
				2014-15	2015-16	% Change over CP
Kolkata	39928	41386	46292	21116	25260	19.6
Kolkata DS	11844	12875	15282	7054	8061	14.3
Haldia DC	28084	28511	31010	14062	17199	22.3
Paradip	56552	68003	71011	34348	36068	5.0
Vizag	59038	58504	58004	30589	27637	-9.7
Kamarajar (Ennore)	17885	27337	30251	14649	15979	9.1
Chennai	53404	51105	52541	26719	25811	-3.4
Chidambaranar(Tuticorin)	28260	28642	32414	15716	18668	18.8
Cochin	19845	20886	21595	11355	11331	-0.2
New Mangalore	37036	39365	36566	18230	16927	-7.1
Mormugao	17738	11739	14711	6340	8117	28.0
Mumbai	58038	59184	61660	29831	31117	4.3
JNPT	64488	62333	63801	32305	32279	-0.1
Kandla	93619	87005	92483	46539	50383	8.3
All Ports	**545831**	**555489**	**581329**	**287737**	**299577**	**4.1**

Source : IPA, (P): Provisional

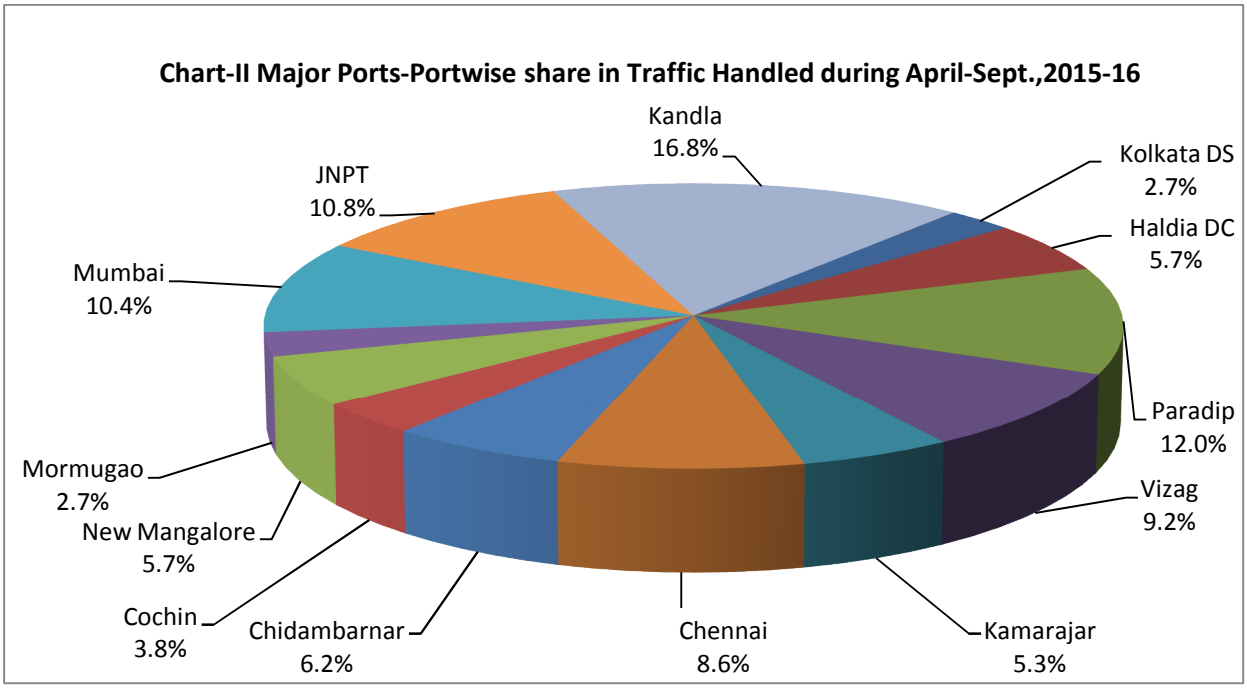
Commodity-wise growth of cargo traffic at Major Ports

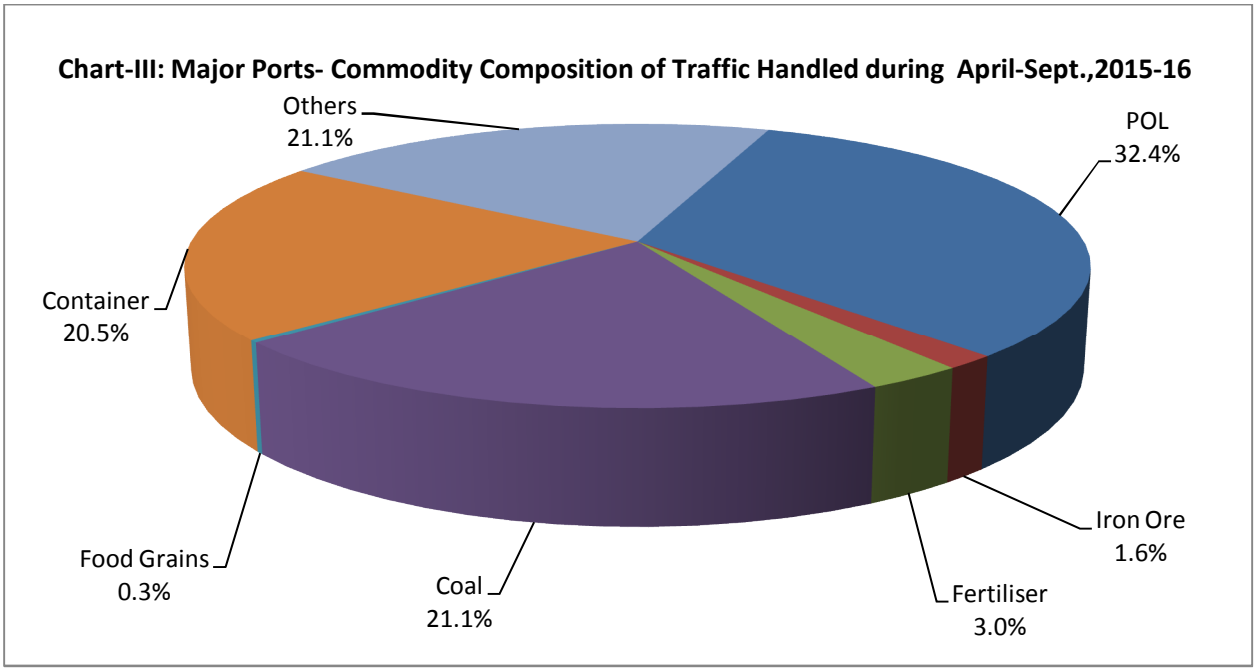
1.4.4 At a broad commodity level **(Table-6),** during first six months of April-September of 2015-16, Fertilizers and FRM posted growth of 12.3%, followed by Coal (12.0%), Other Commodities (10.9%), POL (3.4%) and Container (1.3%). Cargo traffic in Iron ore was affected during the period and dropped by 48%. The decline in Iron ore traffic is mainly attributed to restrictions in mining of iron ore.

1.4.5 In terms of composition of cargo traffic handled at major ports, the largest commodity group (with share in percent in total cargo handled) during April-September, 2015-16 was POL (32.4%), followed by Other cargo (21.1%), Coal (21.1%), Container traffic (20.5%), Fertilizer & FRM (3.0%), Iron ore (1.6%) and Food Grain (0.3%).

Table 5 : Commodity-wise Traffic Handled at Major Ports (Thousand Tonnes)						
Commodity	**2012-13**	**2013-14**	**2014-15(P)**	**April-September(P)**		
				2014-15	**2015-16**	**% Change over CP**
POL	180725	181055	188743	94006	97174	3.4
Iron Ore	27289	24616	16605	9177	4771	-48.0
Fertiliser	**14797**	**13784**	**16224**	**7956**	**8938**	**12.3**
a. Finished	7469	6149	7851	3675	5167	40.6
B. Raw	7328	7635	8373	4281	3771	-11.9
Coal	**86804**	**104271**	**118194**	**56515**	**63275**	**12.0**
a. Thermal Coal	58772	71651	85287	40499	47256	16.7
b. Coking Coal	28032	32620	32907	16016	16019	0.0
Food Grains	6597	4796	3132	2456	832	-66.1
Container	119866	114672	119441	60666	61432	1.3
Others	109753	112295	118990	56961	63155	10.9
Total	**545831**	**555489**	**581329**	**287737**	**299577**	**4.1**
(P) : Provisional; CP : Corresponding period-April-September 2015-16						

1.4.6 The Port-wise and Commodity-wise shares in total cargo traffic during April-September, 2015-16 are depicted in the **Charts II and III** respectively.





1.4.7 The Port-wise & commodity-wise traffic handled at major ports from 2010-11 onwards are given in **Annex -II.**

Container Traffic

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

PORT	2013-14		2014-15(P)		April-September				% Change over CP			
					2014-15		2015-16		April- Sep. 2014-15		April- Sep. 2015-16	
	Tn	TEU	Tn	TEU	Tn	TEU	Tn	TEU	Tn	TEU	Tn	TEU
Kolkata	7063	449	8109	528	3987	258	4485	282	7.0	8.4	12.5	9.3
Haldia	2230	113	1957	102	940	57	652	43	-16.7	-5.0	-30.6	-24.6
Paradip	99	9	67	4	26	2	66	3	-7.1	-33.3	153.8	50.0
Visakhapatnam	4916	262	4373	248	2380	134	2299	134	-6.0	2.3	-3.4	0.0
Chennai	28330	1468	29945	1552	15285	792	15517	804	4.7	4.6	1.5	1.5
Ennore	0	0	0	0	0	0	1	0	0	0	0.0	0.0
Tuticorin	10129	508	11034	560	5444	278	6122	310	7.9	10.3	12.5	11.5
Cochin	4785	343	5246	366	2713	187	2778	201	10.5	5.1	2.4	7.5
New Mangalore	747	50	921	63	493	34	565	39	34.3	36.0	14.6	14.7
Mormugao	236	19	312	25	136	11	144	12	21.4	10.0	5.9	9.1
J. L. Nehru	55235	4162	56933	4467	28971	2233	28546	2234	6.6	8.3	-1.5	0.0
Mumbai	449	41	544	45	291	24	243	21	34.7	26.3	-16.5	-12.5
Kandla	453	29	0	0	0	0	14	1	-	-	-	-
All Ports	**114672**	**7453**	**119441**	**7960**	**60666**	**4010**	**61432**	**4084**	**4.9**	**6.6**	**1.3**	**1.8**

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

1.4.7 Growth in container traffic (in million tonnes) which reflects largely trade in manufactures and components, at 1.3% during April-September, 2015-16 is lower as

compared to 4.9% in the corresponding period of 2014-15. In terms of Twenty Foot Equivalent Units (TEUs), containers handled by Major Ports in April-September, 2015-16 recorded 1.8% growth as compared to 6.6% in the corresponding period of 2014-15. Amongst the major ports, the ports at Haldia DC, Vishakhapatnam, JNPT and Mumbai witnessed fall in container traffic. JNPT is continues to be the leading container handling port in the country with a share of 46.5% in terms of tonnage and 54.7% in terms of TEUs in the total container traffic at major ports during April ï September, 2015-16.(**Table 7**). Chennai port which handled 25.3% of container cargo is the second largest container handling port.

1.5 Cargo Traffic at Non-Major Ports

1.5.1 Nonï major ports handled about 43% of total maritime freight traffic of the country during April-September, 2015-16.

1.5.2 **Table 7** presents maritime state-wise share and growth of traffic handled at Non-major ports from 2013-14 onwards.

Table 7 : Traffic Handled by Non-Major Ports by Maritime States/UTs

Maritime State/UT	Traffic Handled ('000 Tonnes)				% Change over Previous Year			
	2013-14	2014-15	April-September		2013-14	2014-15	April-September	
			2014-15	2015-16			2014-15	2015-16
Gujarat	309945 (74.33)	336093 (71.33)	164940 (72.30)	166408 (73.66)	7.7	8.4	8.1	0.9
Maharashtra	24664 (5.92)	27295 (5.79)	12632 (5.54)	12158 (5.38)	1.9	10.7	11.9	-3.8
Andhra Pradesh	58692 (14.08)	83444 (17.71)	38146 (16.72)	35847 (15.87)	13.3	42.2	31.6	-6.0
Goa	284 (0.07)	760 (0.16)	186 (0.08)	0 (0.00)	-91.6	-	-	-
Tamil Nadu	866 (0.21)	825 (0.18)	478 (0.21)	414 (0.18)	-7.2	-4.7	25.1	-13.4
Karnataka	509 (0.12)	651 (0.14)	278 (0.12)	339 (0.15)	-16.6	27.9	35.0	21.9
OtherStates/UTs	22010 (5.28)	22127 (4.70)	11481 (5.03)	10751 (4.76)	14.8	0.5	8.6	-6.4
All M.States/UTs	416970 (100)	471195 (100)	228141 (100)	225917 (100)	7.5	13.0	11.8	-1.0

Note: Figure in parenthesis is the percentage share of traffic handled by the maritime state to the total traffic handled by all the maritime states; P Rovisional

1.5.3 The growth in cargo handled by the non-major ports during April-September, 2015-16 was -1.0% compared to 11.8% recorded in the corresponding period of 2014-15. The growing importance of non-major ports in handling cargo traffic during last decade has helped alleviate the congestion at major ports. **Table 7** provides traffic handled by non-major ports in terms of maritime states (geographic location) and **Table 8** gives a glimpse of

commodity profile of the cargo handled. The above table reflects that Gujarat accounted for (73.7%) of the traffic handled by the non-major ports followed by Andhra Pradesh (15.9%) and Maharashtra (5.4%). Three maritime States, viz, Gujarat, Andhra Pradesh and Maharashtra together accounted for 95% of the total cargo traffic handled by the non-major ports in April-September,2015-16.

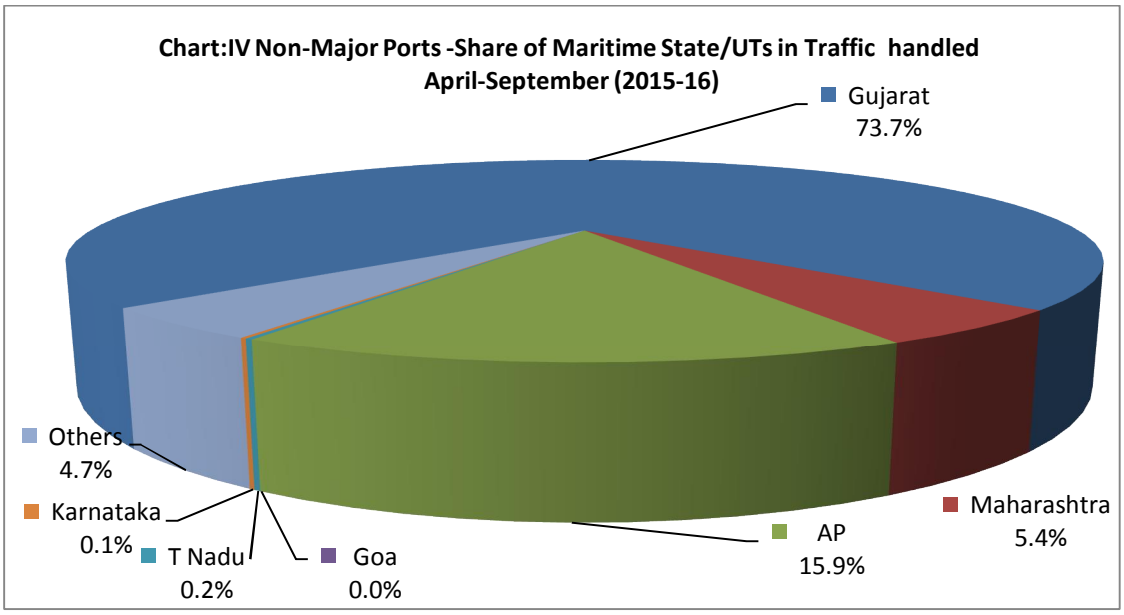
1.5.4 Two commodities, viz. POL and Coal accounted for more than two-third of the total cargo handled at the non-major ports during April-September, 2015-16.(**Table 8**).

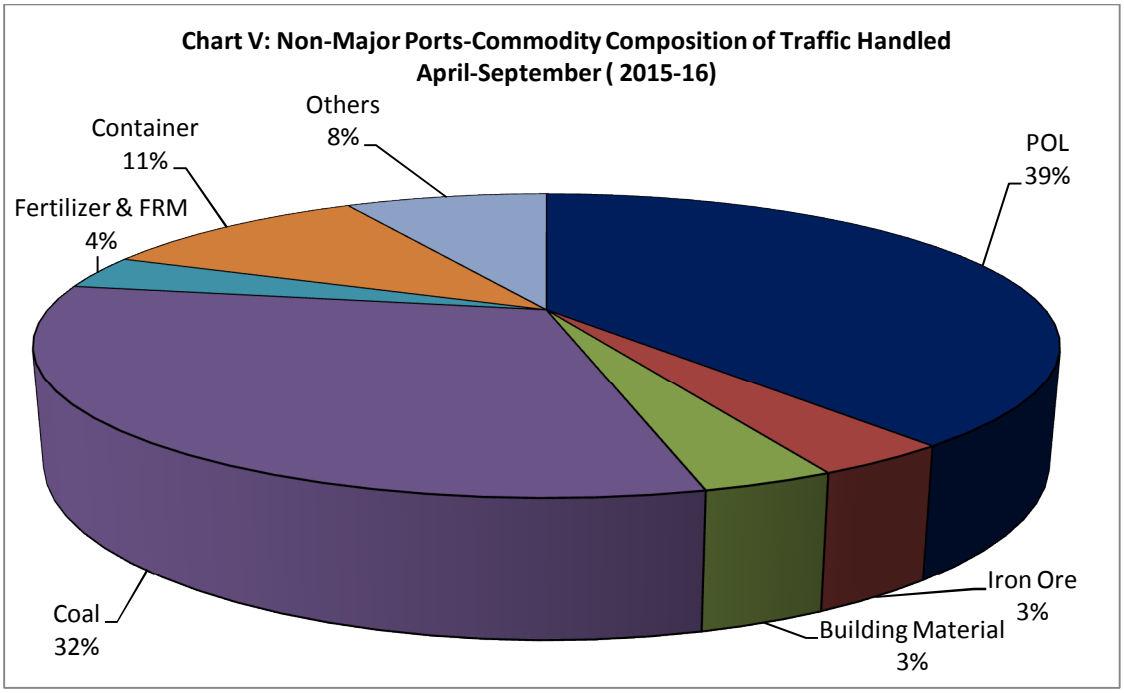
Table 8 : Commodity-wise Traffic Handled by Non-Major Ports

Commodity Group	Traffic Handled ('000 Tonnes)				% Change over Previous Period			
GROUP	2013-14	2014-15	April-September(P)		2013-14	2014-15	April-September	
			2014-15	2015-16			2014-15	2015-16
POL	169777 (40.72)	156507 (33.21)	83235 (36.48)	88420 (39.14)	0.7	-7.8	-1.6	6.2
Iron Ore	18338 (4.40)	27070 (5.74)	11100 (4.87)	7979 (3.53)	-16.1	47.6	32.2	-28.1
Building Materials	14178 (3.40)	14435 (3.06)	8613 (3.78)	7636 (3.38)	18.6	1.8	56.7	-11.3
Coal	126321 (30.29)	158755 (33.69)	77314 (33.89)	71533 (31.66)	15.6	25.7	18.7	-7.5
Fertilizer & FRM	12010 (2.88)	13940 (2.96)	5315 (2.33)	8029 (3.55)	-4.3	16.1	-19.9	51.1
Container	37352 (8.96)	44028 (9.34)	22304 (9.78)	24283 (10.75)	50.0	17.9	30.1	36.9
Others	38994 (9.35)	56460 (11.98)	20260 (8.88)	18037 (7.98)	0.4	44.8	15.5	-11.0
All	416970 (100)	471195 (100)	228141 (100)	225917 (100)	7.5	13.0	11.8	-1.0

Note: Figure in parenthesis is the percentage share of major commodity groups in the total traffic handled by the Non major ports

1.5.5 The share of Maritime States/UTs in the total traffic and Commodity-wise composition of traffic during April-September, 2015-16 is depicted in the pie **Charts IV and V.**





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

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

1.6 Impact of Global Macro Developments on Maritime Trade

1.6.1 Impact of growth on India's seaborne cargo

1.6.1.1 Indiaôs Maritime Transport growth is driven by developments in the world economy viz. growth in world output & trade as well as in Indian economy. Thus volume of seaborne cargo traffic is essentially in the nature of derived demand and is mainly shaped by the levels and changes in both the global and domestic activity. During 2015-16, (April-September) the GVA growth declined to 7.2% from 7.9% in 2014-15. Cargo traffic handled by Indiaôs 12 major ports (which accounts for 57% of Indiaôs total seaborne cargo) during 2015-16 (April-September) was 299.58 million tonnes compared to 287.74 million tonnes during 2014-15(April-September) showing a growth of 4.1%. The trajectory of growth in cargo handled at Indiaôs major ports comes into sharp focus when these growth rates are viewed in terms of quarterly growth trajectories. The Industry sector which is a major factor influencing seaborne container cargo traffic posted a GVA growth of 6.7% in H1 (April ï September) of 2015-16 as compared to 7.6% in 2014-15 (April-September). GVA of Industry sector recorded quarterly growth of 7.7% in Q1 and 7.6% in Q2 during (April- September) 2014-15 and 6.5% in Q1 and to 6.8% in Q2 during (April ï September) 2015-16. While trends in POL, coal and fertilizers are largely driven by the dynamics of domestic demand supply, those of container traffic and ñother cargoò in particular are largely shaped by the state of global demand and economic activity. Iron ore traffic has been impacted by the judicial intervention. The growth in Iron Ore traffic, in the Q1 of 2014-15 at 4.4% posted negative growth of 42.2% in the Q2 of 2014-15 and continued to record negative growths of 62.3% & 29.2% in Q1 and Q2 of 2015-16 respectively. Negative growth in Iron Ore cargo traffic further slipped to 48.0% in first half of 2015-16 from 22.5% in first half of 2014-15. The overall growth of Cargo handled, which was 3.8% in H1 (April-September) of 2014-15 has improved to 4.1% in H1 (April-September) of 2015-16.

1.6.1.2 **Table 10** gives Quarter wise trend in growth of cargo traffic handled at Major ports, GVA overall and GVA of Industry sector during Q1 and Q2 and Half yearly growth of 2014-15 and 2015-16.

Table 10 : Quarter wise Trend in Growth of Cargo Traffic at Major Ports & GDP						
Commodities/ Year	**2014-15**			**2015-16**		
	Q1	**Q2**	**Half-yearly Growth**	**Q1**	**Q2**	**Half-yearly Growth**
POL	0.0	-1.1	-0.6	4.5	0.3	3.4
Iron Ore	4.4	-42.2	-22.5	-62.3	-29.2	-48.0
Coal	0.2	15.3	7.5	15.8	10.6	12.0
Fertilizer	21.5	9.7	14.2	0.8	21.8	12.3
Container (in tonnes)	4.3	5.5	4.9	1.2	1.4	1.3
TEUs	4.1	9.0	6.6	2.4	1.8	1.8
Other cargo	14.7	8.1	11.1	8.6	7.7	7.7
All Cargo	4.4	3.3	3.8	4.3	3.9	4.1
GVA overall	7.4	8.4	7.9	7.1	7.4	7.2
GVA -Industry	7.7	7.6	7.6	6.5	6.8	6.7
GVA: Gross Value Added at factor cost at 2011-12 prices.						

1.6.2 Recent Developments in Global Ocean Freight Rates

In 2014, the freight rates market remained very volatile in its various segments. The continuous delivery of newly built large vessels and hesitant demand in the global shipping market put pressure on rates.

1. Container freight rates

Container freight rates remained volatile throughout 2014 although with different trends in individual trade lanes. Market fundamentals did not change significantly despite the expansion in global demand for container shipping. This was mainly due to the constant supply pressures that the market rates continued to face with the introduction of very large units in mainlane trades and the cascading effect on non-main lane trades. The growth in global demand for container shipping reached 6 per cent in 2014 (compared to 5 per cent in 2013), outpacing that of supply, which remained at 5 per cent. Global container demand was boosted mainly by strong trade growth on the peak leg main lanes of the Far Eastï Europe and the trans-Pacific, where North Europe imports and United States imports from Asia performed particularly well in 2014. Mainlane freight rates recorded a general improvement in 2014 compared to 2013 levels.

For 2015, the Baltic Dry Index , which was at 591 in April, 2015 reached 900 in September, 2015 . The order book schedule also indicates that further ultra-large container ships will be delivered to the main lanes in 2015ï 2016 and the extent to which cascading

impact it will have will largely determine freight rates on both the mainlane and non-mainlane trades. Moreover, some new challenges could emerge in the future, as global trade is expected to be increasingly concentrated around regional manufacturing hubs, thereby potentially decreasing future travel distances. The charter market environment may improve with significant scrapping levels of small and medium-sized vessels and the relatively small order book of container ship capacity in the smaller size ranges.

2. Tanker freight rates

The tanker market, which encompasses the transportation of crude oil, refined petroleum products and chemicals, witnessed an equally volatile freight rate environment in 2014 and early 2015. As a whole, the Baltic index for crude oil (Baltic Dirty Tanker Index) progressed by 21 per cent in 2014, reaching 777 points, whereas the Baltic Clean Tanker Index remained almost at the same level as in 2013, with 607 points, compared to 605 in 2013. In 2014, freight rates for both crude and product carriers increased in general for all vessel segments. Demand outperformed supply for the first time since 2010, leading to higher freight rates. The crude tanker market turned out to be better than expected in 2014, particularly towards the second half of the year, when a drop in crude oil prices increased demand for such tankers. In addition, the slow expansion in oil fleet supply (which only increased by 4.5 per cent), slow steaming and the change in trading pattern (fewer imports to the United Sates and increasing demand from the Far East economies), which resulted in longer distances (Barry Rogliano Salles, 2015), triggered a surge in 2014 spot rates in most segments.

The collapse in oil prices by almost 60 per cent over the second half of 2014 resulted in positive impacts on the tanker market. Demand for crude oil tankers was also boosted as a consequence of the increase in oil stockpiling, especially by Asian countries (namely China), increases in refinery runs and increases in floating storage as the contango situation developed. As such, the tight availability of tonnage and increase in activity pushed up very large crude carrier spot freight rates on key freight routes, namely Asian routes, towards the end of 2014.

The tanker market is likely to remain positive with Average Dirty Tanker Index reaching a level of 853 and Clean Tanker Index at 678 during first half of 2015. Moreover, a change in

the pattern of trade and demand, namely involving the decline in refining capacity in Europe and an increase in Asia and the Middle East, may result in increasing freight rate volatility.

Table 11 - Baltic Exchange Rate Index									
	2008	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**	**%age change (2014/ 2013)**	**2015 (First Half)**
Dirty Tanker Index	1 510	581	896	782	719	642	777	21	853
Clean Tanker Index	1155	485	732	720	641	605	607	0.033	678

Source : Review of Maritime Transport -2015

3. Dry bulk freight rates

Despite a strong start and high expectations for a positive impetus carried over from 2013, the dry bulk market freight rates faced another challenging year influenced by the surplus capacity that still exists and the uncertainties in demand projections in 2014. Bulk carrier earnings fell 5 per cent from 2013 to reach an average of $9,881/day. The low level of earnings exerted financial pressure on owners and led to several companies filing for bankruptcy. As an overall indicator of the continued depression in dry bulk earnings, the Baltic Exchange Dry Index slid to a low level of 796 points in July 2014, to end at 910 points in December 2014

The freight rates for all dry-bulk segments have been low throughout 2015, the July/August spike for Capesize ships being the short-lived exception. Averages for the first eight months of 2015 range from USD 5,605 per day for a Handysize to USD 8,163 per day for a Capesize. The poorest freight market on record is due to a combination of demand weakness and capacity abundance. Unfortunately, there are no easy ways to escape this. As China is going through a period of transition that does not favour the dry-bulk shipping industry, the prime driver is out of the picture. Capacity has been abundant for years, so it is the change to the demand side, the variable that the industry cannot impact, which is at the epicentre in 2015. The dry bulk market rates will continue to be dominated by growing supply and uncertainties concerning the demand for dry bulk commodities from China. Factors that could influence demand in the future include innovation in technologies that seek to improve

fuel efficiency and substitute for coal, and the increased number of countries that are setting policies and regulations aimed at reducing carbon emissions.

1.6.3 Trends in Global Top 20 Cargo/Container Ports

1.6.3.1 Growth in cargo and container traffic at world's top major ports/container terminals is a barometer of trends in seaborne trade. The growth in cargo traffic (million tonnes) at world's top 20 ports was at 5.7 % in 2014 as compared to 6.7% in 2013. The growth in container traffic (million TEUs) was 4.6 % in 2014 as compared to 4.1% in 2013.

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	2012	2013	2014
1	Ningbo & Zhoushan (PRC)	744.0	809.8	873.0
2	Shanghai (PRC)	736.0	776.0	755.3
3	Singapore	538.0	560.8	580.8
4	Tianjin (PRC)	476.0	500.6	540.0
5	Tangshan (PRC)	364.6	446.2	500.8
6	Guangzhou (PRC)	434.0	454.7	500.4
7	Qindao(PRC)	402.0	450.0	480.0
8	Rotterdam(Netherlands)	441.5	440.5	444.7
9	Dalian(PRC)	373.0	408.4	420.0
10	Port Hedland (Australia)	246.7	288.4	372.4
11	Rizhao (PRC)	281.0	309.2	353.0
12	Yingkou	301.1	330.0	330.7
13	Hong Kong 1)	269.3	276.1	297.7
14	Qinhuangdao(PRC)	271.5	272.6	274.0
15	Busan 2)	260.0	269.5	266.7
16	South Louisiana(USA)	253.5	241.6	264.7
17	Shenzen (PRC)	228.1	234.0	223.2
18	Xiamen(China)	172.0	191.0	205.0
19	Antwerp (Belgium)	184.1	190.8	199.0
20	Port Klang (Malaysia) 2)	158.3	160.2	162.0
	Total of Top 20 Ports	**7134.7**	**7610.4**	**8043.4**

Source: Port Statistics, Port of Rotterdam Authority;
PRC: Peoples Republic of China;
: 1) Including river trade, 2) Converted from freight ton to metric ton

Table 13 - Top 20 World Container Ports (in Million TEUs)				
S.No.	**Port**	**2012**	**2013**	**2014**
1	Shanghai (PRC)	32.5	36.6	35.3
2	Singapore	31.7	32.6	33.9
3	Shenzhen (PRC)	22.9	23.3	24.0
4	Hong Kong (PRC)1)	23.1	22.4	22.2
5	Ningbo & Zhoushan (PRC)	16.8	17.4	19.5
6	Busan (Republic Korea)	17.0	17.7	18.7
7	Guangzhou(PRC)	14.7	15.3	16.6
8	Qingdao(PRC)	14.5	15.5	16.6
9	Dubai Ports (UAE)	13.3	13.6	15.2
10	Tianjin(PRC)	12.3	13.0	14.1
11	Rotterdam (Netherlands)	11.9	11.6	12.3
12	Port Klang (Malaysia)	10.0	10.4	10.9
13	Kaohsiung (Taiwan Province of PRC)	9.8	9.9	10.6
14	Dalian(PRC)	8.1	10.0	10.1
15	Hamburg (Germany)	8.9	9.3	9.7
16	Antwerpen (Belgium)	8.6	8.6	9.0
17	Xiamen(PRC)	7.2	8.0	8.6
18	Tanjung Pelepas (Malaysia)	7.7	7.6	8.5
19	Los Angles (USA)	8.1	8.1	8.3
20	Jakarta(Indonesia)	6.1	6.2	6.5
	Total of Top 20 Ports	**285.2**	**297.0**	**310.6**

Source: Port Statistics, Port of Rotterdam Authority;
PRC: Peoples Republic of China;
All China Ports including domestic trade and river trade; 1) Including river trade

1.7 Policy Initiatives - Central Government

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

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

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

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

Maritime Agenda 2010-20

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

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

1.7.6 The agenda for the Ports are:-

- Develop Two New Major Ports one each on east and west coasts.
- Full mechanization of cargo handling and movement
- Major Ports to have draft of not less than 14 metres and hub ports 17 metres.
- Identification and implementation of projects for rail, road and inland waterway connectivity to ports.
- Development of two hub ports on each of the West and the East coasts

- **Port Policy Measure**
    - New Land Policy for Major Ports
    - New Policy on captive berths
    - New Policy on dredging
    - Shifting of transshipment of Indian containers from foreign ports to Indian ports.
    - Policy on co-operation and competition amongst Indian Ports
    - Establishing ôIndian Ports Globalôfor overseas investments by Indian Ports.
    - Development of two non-major ports, one at Dugarajapatnam in Andhra Pradesh and other in Sagar, West Bengal.

Private Sector Participation

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

1.7.8 To encourage private sector participation uniformity, clarity and transparency in the bidding process is of the prime importance. The Ministry of Shipping has already put in place guidelines for private sector participation. To ensure uniformity in short listing and bidding Model RFQ and RFP documents have been finalized. A Model Concession Agreement has also been finalized which attempts to bring in uniformity to the agreements to be signed by the Major Ports as Concessioning Authority with the various private operators as concessionaire. During the year 2014-15, 10 Public Private Partnership (PPP) projects were awarded at an estimated investment of Rs. 9376.42 crore for capacity addition of 95.11 MT in the major ports comprising construction of berths and terminals, mechanization of existing berths etc.

1.7.9 The preferred route for private sector participation is through open competitive bidding in which the bidder offering the highest percentage of revenue share out of the operation of the facility which is licensed out is selected. The tariff fixation is carried out by TAMP which is an independent Regulatory Body. At present the tariffs are fixed upfront which

act as a ceiling before a project is bidded out on revenue share basis as explained above. The private operators are free to charge below the ceiling.

Areas of private investment

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

(a) Leasing out existing assets of the Port.

(b) Construction/creation of additional assets, such as:

- construction and operation of container terminals.
- construction and operation of bulk, break bulk, multipurpose and specialized cargo berths.
- warehousing, container freight stations, storage facilities and tank farms.
- cranage/handling equipment.
- setting up of captive power plants.
- dry docking and ship repair facilities.

(c) Leasing of equipment for port handling and leasing of floating crafts from the private sector.

(d) Pilotage.

(e) Captive facilities for port based industries.

National Transport Development Policy Committee (NTDPC)

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

a) Strategic view on port investment

(i) Mega ports

A key government priority should be to invest in 4 to 6 Mega ports over the next 20 years, with 2 to 3 on each coast to substantially cater to our foreign trade and the estimated

requirement of raw material imports and exports by 2030. These mega ports can be established either by transforming some of the existing major (or non-major) ports into mega ports, if feasible, by combining some major and minor ports, or by setting up totally new mega ports. The location of the proposed mega ports should be harmonised with plans for the NHDP as well as with the upcoming and future DFCs.

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

(ii) Drafts

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

b) Strategic Institutional shift – Landlord model of port governance

- The ports in India, essentially the major-ports, widely follow a hybrid format of the long obsolete service port model and the preferred landlord model. The hybrid approach has resulted in a conflict of interest between the port trusts and the private sector.
- There is immediate need to make appropriate legislative and policy changes to expedite the move to the landlord model and to transform the port trusts to statutory landlord port authorities through specific legislation. All the terminal operations of port trusts would need to be corporatized as public sector corporations. Then, both private- and corporatized public-sector terminal operators would compete under the aegis of the landlord port authority. The corporatized public sector terminal operators could potentially be disinvested, listed, and possibly privatised at a later stage. The landlord port authority would carry out all public sector services and operations such as the award of bids for containers and other terminals, dredging etc.
- Any progressive regulatory shift should attempt to bring in the cooperation and participation of maritime states.
- New Land Policy Guidelines have since been issued in January, 2014. These guidelines provide an open and transparent framework for managing Port Lands. The Policy will ensure that land resources of the Ports are put to optimum use and all leasing of port lands is done through a transparent tender-cum-auction methodology. This has brought in accountability and minimized the element of discretion and arbitrariness at port level.

c) Role of TAMP

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

d) Coastal Shipping

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

A New Central Sector Scheme has been formulated to provide financial support by way of grant to:

(1) Major Ports/ Non-Major Ports for
  (i) Construction/ up-gradation of
    (a) exclusive coastal berths for coastal cargo
    (b) berths/Jetties for passenger ferries

(c) construction of platforms/ jetties for hovercrafts/ seaplanes in port waters and

(2) State Governments concerned for construction of berths/jetties in National Waterways.

Assistance under the proposed revised scheme would be given up to 50% of the total cost of the project subject to a maximum of Rs. 25 crores for projects related to construction/ upgradation of coastal berths for coastal cargo and passengers and a maximum of Rs. 10 crore for construction of platforms for hovercrafts and jetties for seaplanes. The balance cost will have to be borne by respective ports/ concerned State Govt. from their internal/own resources.

e) Sagarmala Project

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

(f) A New Central Sector Scheme has been formulated for providing financial assistance to Major Ports for Green Port Initiatives.

The objective of the New Central Sector Scheme is to support Major Ports by way of financial assistance to formulate an Environmental Management and Monitoring Plan (EMMP) or Green Plan as also to acquire equipments for monitoring the environmental pollution and take mitigating measures to keep the pollution within accepted regulatory standards/norms. It is also proposed to give financial assistance for taking up projects for energy generation from renewable energy resources as also for other projects for addressing Green Port Initiatives like water re-cycling, ecologically friendly garbage disposal, Green curtains, water curtains etc. Financial assistance under the Scheme would be given in the form of grant-in-aid. It would be given to the extent of Rs.50% of the cost of the project with the balance to be contributed by the concerned Major Port.

(g) New Central Sector Scheme for providing assistance to Major Ports and oil handling Non-Major Ports under State Maritime Boards/ State Govts for combating oil pollution and for mitigating measures

Government has formulated a new Central Sector Scheme for providing assistance to Major Ports and 26 oil handling Non-Major Ports under State Maritime Boards/ State Govts for combating oil pollution/spills and for mitigating measures. Financial assistance under the Scheme would be given in the form of grant-in-aid to help these ports procure pollution response (PR) equipments/ materials necessary for combating Tier-I oil spills in their port waters. Based on the risk of oil spill, these Ports have been divided in 3 categories viz category A, B, & C and for procurements of requisite Pollution Response equipments /materials. The estimate cost is Rs. 15 Cr. , Rs. 2.50 cr and Rs. 1.00 cr. respectively. Assistance under the Scheme would be given upto 50% of the total cost of the procurement of pollution response (PR) equipments/ materials in 2 equal instalments and the balance 50% to be contributed by the respective port from itsôown resources.

(h) Stevedoring Policy

The Ministry of Shipping has formulated a new Stevedoring and Shore handling policy for Major Ports. The policy has been prepared in consultation with Major Ports and other Stake-holders. The policy shall come into effect in all the Major Ports except Haldia Dock Complex (HDC) not later than 01.04.2016. The policy envisages an open and transparent auction system based on the TAMP notified tariff to give licenses for stevedoring and shore handling on revenue sharing basis for a period of three years. It is expected that the policy will bring in competition amongst the service providers and enable qualitative and cost effective services to the Trade.

(i) Benchmarking Study

A study to benchmark the performance of Indian Major Ports to Comparable International Ports was awarded to Boston Consultancy Group in April, 2015. The Consultants have completed the study of all the Major Ports and submitted their Report to the Govt. The recommendations made in the Report are under implementation. Implementation of these recommendations is likely to further improve the operational efficiency of the ports in terms of time and cost.

2. POLICY AND PERFORMANCE OF MARITIME STATES

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

Chart - VI

Source:http://www.mapsofindia.com

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

2.3 Maritime States Development Council (MSDC)

2.3.1 With a view to have an integrated approach for the development of both Major and Non-Major Ports, the **Maritime States Development Council (MSDC)** was constituted in May, 1997 under the Chairmanship of the Hon'ble Minister of Shipping. The Ministers in-charge of Ports in all Maritime States, Union Territories of Puducherry, Andaman & 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 sixteen meetings of MSDC have been held.

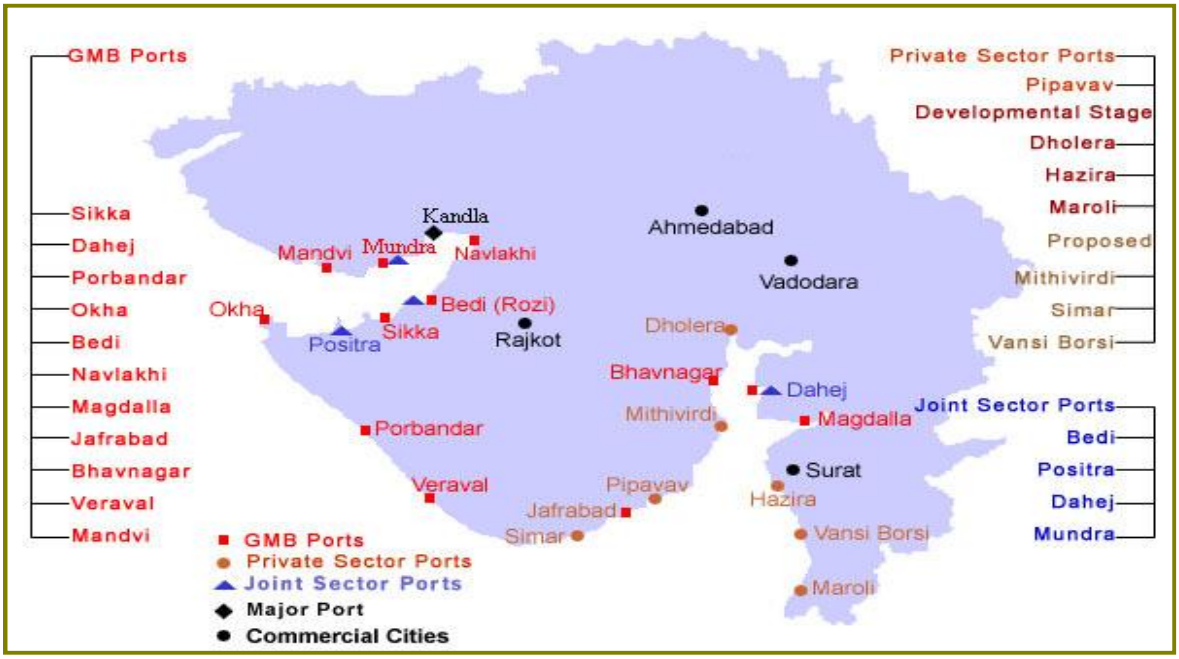
2.4 Maritime States – Non-Major Ports

Non-major ports in India collectively handled 225.92 million tonnes of traffic during H1 of 2015-16 as compared to 228.14 million tonnes of cargo handled in the corresponding period of 2014-15.

2.4.1 GUJARAT

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

Chart – VII: Gujarat: Major and Minor Ports



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

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

Table 14 - Gujarat: Trends in Cargo Handled at Major & Non-Major Ports (MillionTonnes)

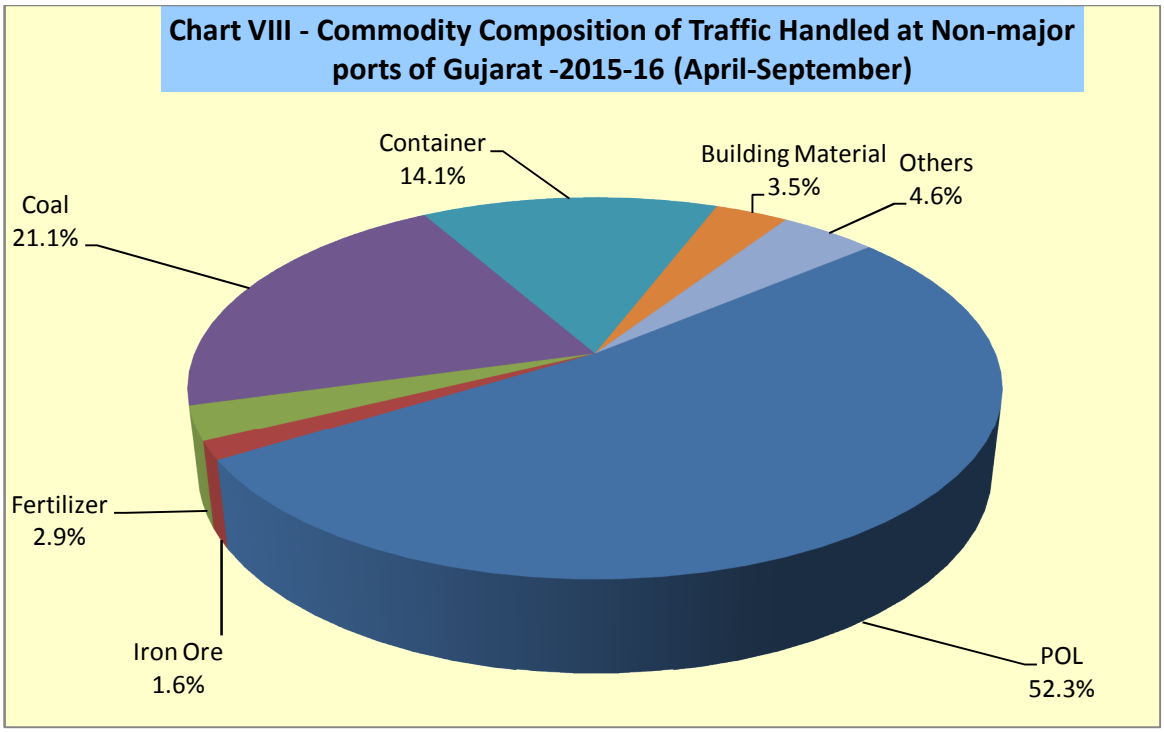
Major/Non-Major	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15(P)	April-September	
									2014-15(P)	2015-16(P)
Major Ports	64.92	72.22 (11.2)	79.50 (10.1)	81.88 (3.0)	82.50 0.8)	93.62 (13.5)	87.01 -(07.1)	92.48 (6.3)	46.54	50.38 (8.3)
Non-Major Ports	150.52	152.8 (1.5)	205.58 (34.5)	230.91 (12.3)	259.05 (12.2)	287.82 (11.1)	309.94 (7.7)	336.09 (8.4)	164.94	166.41 (0.9)
All Ports	215.44	225.03 (4.5)	285.08 (26.7)	312.79 (9.7)	341.55 (9.2)	381.437 (11.7)	396.95 (4.1)	428.57 (8.0)	211.48	216.79 (2.5)

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

2.4.1.3 It is noteworthy that all ports (major and non-major) located along the coast of Gujarat handled more than 41% of the total cargo handled by Indian ports in the first six months of 2015-16. The total cargo traffic handled at the major and non-major ports of Gujarat during first six months of 2015-16 was of the order of 216.79 million tonnes as against 211.48 million tonnes in 2014-15, reflecting an increase of 2.5%. In particular, non-major ports of

Gujarat alone handled close to three-fourth of total cargo traffic at India's non-major ports during the period under reference.

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



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

Table 15 - Gujarat: Non Major Ports - Current Capacity & Utilization (Million Tonnes)

Item	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15(P)
Capacity*	197	235 (19.3)	244 (3.7)	267 (9.8)	323 (20.8)	366 (13.3)	387 (5.7)	422 (9.0)
Cargo Handled	150.52	152.81	205.58	230.91	259.04	287.82	309.94	336.09
% Utilization	**74.92**	**64.89**	**84.36**	**86.35**	**80.2**	**78.6**	**80.1**	**79.6**

* Including Lighter age Port Capacity;

Figures within parenthesis indicate capacity addition in % age during the year

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

2.4.2 MAHARASHTRA

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

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

Table 16 - Maharashtra: Cargo Handled at Major & Non-Major Ports (Million Tonnes)

Major/Non-Major	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15(P)	April-September	
									2014-15(P)	2015-16(P)
Major Ports	112.88	109.18 -(3.3)	115.30 (5.6)	118.90 (3.1)	121.92 (2.5)	122.53 (0.5)	121.52 -(0.8)	125.46 (3.2)	62.14	63.40 (2.0)
Non-Major Ports	11.36	10.42 -(8.3)	12.05 (15.6)	14.88 (23.5)	19.95 (34.1)	24.20 (21.3)	24.66 (1.9)	27.30 (10.7)	12.63	12.16 -(3.7)
All Ports	124.24	119.6 -(3.7)	127.35 (6.5)	133.78 (5.0)	141.87 (6.0)	146.73 (3.4)	146.18 -(0.4)	152.76 (4.5)	74.766	75.56 (1.1)

Figures in bracket represent percentage change over the previous year/period. P- Provisional

2.4.3 GOA

2.4.3.1 Goa with a coastline of about 118 kms. is criss-crossed by 7 rivers. Apart from the major port at Mormugao, there are five non-major ports all of which are riverine ports with an average depth of about 2 meters except Panaji (which is the lone cargo handling non-major port) with a depth of 4 meters.

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

Table 17: Goa : Trends in Cargo Handled at Major & Non-Major Ports (MillionTonnes)										
Major/Non-Major	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15(P)	April-September	
									2014-15(P)	2015-16(P)
Major Ports	35.13	41.68 (18.6)	48.85 (17.2)	50.06 (2.5)	39.05 -(22.0)	17.74 -54.6)	11.74 -33.8)	14.71 (25.3)	6.34	8.12 (28.0)
Non-Major Ports	12.83	11.90 -07.2)	13.90 (16.8)	14.58 (4.9)	14.47 -(00.8)	3.39 -76.6)	0.28 -91.6)	0.76 (167.6)	0.19	0.00
All Ports	47.96	53.58 (11.7)	62.75 (17.1)	64.64 (3.0)	53.52 -(17.2)	21.13 -60.5)	12.02 -43.1)	15.47 (28.7)	6.53	8.12 (24.3)
Figures in bracket represents percentage change over the previous year/period. (P) Provisional										

2.4.4 KARNATAKA

2.4.4.1 Karnataka has a coastline of about 280 kms. At present, there is one major sea port, the New Mangalore Port and 11 non-major ports in Karnataka. The ports of Karwar, Mangalore, Tadri, Haldipur and Belakari are main cargo handling non-major ports in the state. During first six months of 2015-16, non- major ports in the State handled 0.34 million tonnes of cargo traffic as compared to 0.28 million tonnes in first six months of 2014-15 reflecting an increase of 21.4% over the corresponding period of previous year.

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

Table 18 - Karnataka: Trends in Cargo Handled at Major & Non-Major Ports (Million Tonnes)										
Major/Non-Major	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15(P)	April-September	
									2014-15(P)	2015-16(P)
Major Ports	36.02	36.69 (0.9)	35.53 -(0.2)	31.55 -(11.2)	32.94 (0.4)	37.04 (12.4)	39.36 (0.3)	36.57 -(0.1)	18.23	16.93 -(0.1)
Non-Major Ports	8.90	4.97 -(44.2)	8.55 (72.0)	3.10 -(63.7)	0.59 -(81.0)	0.61 (0.4)	0.51 -(16.6)	0.65 (27.9)	0.28	0.34 (21.4)
All Ports	44.92	41.66 -(0.3)	44.08 (0.8)	34.65 -(21.4)	33.53 -(0.2)	37.65 (12.3)	39.87 (0.9)	37.22 -(0.7)	18.51	17.27 -(0.7)
Figures in bracket represents percentage change over the previous year/period. (P) Provisional.										

2.4.5 KERALA

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

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

Table 19- Kerala : Trends in Cargo Handled at Major & Non-Major Ports (Million Tonnes)

Major/Non-Major	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15(P)	April-September	
									2014-15(P)	2015-16(P)
Major Ports	15.81	15.5	17.43	17.87	20.09	19.84	20.89	21.60	11.36	11.33
		-(0.0)	(12.5)	(0.5)	(12.4)	-(0.2)	(0.3)	(0.4)		-(0.2)
Non-Major Ports	0.10	0.13	0.12	0.12	0.10	0.10	0.09	0.09	0.06	0.05
		(30.0)	-(0.7)	(0.0)	-(16.7)	-(0.0)	-(0.3)	(0.0)		-(15.6)
All Ports	15.91	15.63	17.55	17.99	20.19	19.94	20.98	21.69	11.42	11.39
		-(0.8)	(12.3)	(0.5)	(12.2)	-(0.3)	(0.2)	(0.4)		-(0.3)

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

2.4.6 TAMIL NADU

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

2.4.6.2 During first six months of 2015-16 the non-major ports in Tamil Nadu collectively handled 0.41 million tonnes of cargo traffic as compared to 0.48 million tonnes in the corresponding period of 2014-15. The trends in the cargo handled at both major and non-major ports of the State during the last few years and current year are given in **Table 20.**

Table 20 - Tamil Nadu: Trends in Cargo Handled at Major & Non-Major Ports (Million Tonnes)										
Major/Non-Major	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15(P)	April-September	
									2014-15(P)	2015-16(P)
Major Ports	90.19	91 (0.9)	95.55 (5.0)	98.2 (2.8)	98.77 (0.6)	99.55 (0.8)	107.08 (7.6)	115.21 (7.6)	57.08	60.46 (5.9)
Non-Major Ports	0.89	0.90 (1.1)	1.17 (30.0)	1.61 (37.6)	1.21 -(24.8)	0.93 -(23.1)	0.87 -(6.9)	0.83 -(4.7)	0.48	0.41 -(14.6)
All Ports	91.08	91.9 (0.9)	96.72 (5.2)	99.81 (3.2)	99.98 (0.2)	100.48 (0.5)	107.95 (7.4)	116.03 (7.5)	57.564	60.87 (5.7)
Figures in bracket represents percentage change over the previous year/period. (P) Provisional.										

2.4.7 ANDHRA PRADESH

2.4.7.1 Andhra Pradesh has one major port at Visakhapatnam besides 14 non-major port locations: Bhavanapadu, Meghavaram, Kalingapatnam, Bheemunipatnam, Gangavaram, Nakkapalli, Kakinada SEZ, Kakinada Deep Water, Surasena Yanam/Rawa, Narsapur, Machilipatnam, Nizamapatnam, Vodarevu and Krishnapatnam. In addition, the department of ports is taking up limited operations at the Kakinada anchorage port.

2.4.7.6 Ports in Andhra Pradesh collectively handled 63.49 million tonnes of cargo during first six months of 2015-16 compared with 68.74 million tonnes in first six months of 2014-15 thus registering decline of 7.6% in traffic handled by major and non-major ports of Andhra Pradesh. Non-major ports in Andhra Pradesh posted negative growth of 6.0% in the first six months of 2015-16. The trends in the cargo handled at both major and non-major ports of the state during the last few years and current year are given in **Table- 21.**

Table 21 - Andhra Pradesh: Trends in Cargo Handled at Major & Non-Major Ports (Million Tonnes)										
Major/Non-Major	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15(P)	April-September	
									2014-15(P)	2015-16(P)
Major Ports	64.6	63.91 -(1.1)	65.5 (2.5)	68.04 (3.9)	67.42 -(0.9)	59.04 -(12.4)	58.50 -(0.9)	58.00 -(0.9)	30.59	27.64 -(9.7)
Non-Major Ports	19.29	29.72 (54.1)	43.69 (47.0)	43.27 -(1.0)	45.63 (5.5)	51.81 (13.5)	58.69 (13.3)	83.44 (42.2)	38.15	35.85 -(6.0)
All Ports	83.89	93.63 (11.6)	109.19 (16.6)	111.31 (1.9)	113.05 (1.6)	110.85 -(1.9)	117.2 (5.7)	141.4 (20.7)	68.74	63.49 -(7.6)
Figures in bracket represents percentage change over the previous year/period. (P) Provisional.										

2.4.8 ORISSA

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

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

2.4.8.3 Non-major ports in Orissa collectively handled 7.01 million tonnes of cargo during first six months of 2015-16 compared with 7.84 million tonnes in first six months of 2014-15 thus registering a decline of 10.6% in traffic. The trends in the cargo handled at both major and non-major ports of the State during the last few years and current year are given in **Table 22**.

Table 22 - Orissa : Trends in Cargo Handled at Major & Non-Major Ports (Million Tonnes)

Major/Non-Major	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15(P)	April-September	
									2014-15(P)	2015-16(P)
Major Ports	42.44	46.41 (09.4)	57.01 (22.8)	56.03 -(01.7)	54.25 -(03.2)	56.55 (04.2)	68.00 (20.2)	71.01 (04.4)	34.35	36.07 (05.0)
Non-Major Ports	0.3	0.3 (00.0)	0.42 (40.0)	0.4 -(04.8)	5.08 (1170.0)	11.07 (117.9)	14.37 (29.8)	15.45 (07.5)	7.84	7.01 -(10.6)
All Ports	42.74	46.71 (09.3)	57.43 (23.0)	56.43 -(01.7)	59.33 (05.1)	67.62 (14.0)	82.371 (21.8)	86.46 (05.0)	42.188	43.08 (02.1)

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

Table 23 - West Bengal :Trends in Cargo Handled at Major & Non-Major Ports (Million Tonnes)

Major/Non-Major	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15(P)	April-September	
									2014-15(P)	2015-16(P)
Major Ports	57.33	54.22 -(0.4)	46.43 -(14.4)	47.55 (0.4)	43.25 -(0.0)	39.93 -(0.7)	41.39 (0.7)	46.29 (11.8)	21.12	25.26 (19.6)
Non-Major Ports	0	0	0	0	0	0	0	0	0	0
All Ports	57.33	54.22 -(0.4)	46.43 -(14.4)	47.55 (0.4)	43.25 -(0.0)	39.93 -(0.7)	41.39 (0.7)	46.29 (11.8)	21.12	25.26 (19.6)

Figures in bracket represents percentage change over the previous year/period. P- Provisional

2.4.10 OTHER NON-MAJOR PORTS

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

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

Table 24 - Union Territory: Trends in Cargo Handled at A & N Islands Port

(Million Tonnes)

Major/Non-Major	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15(P)	April-September	
									2014-15(P)	2015-16(P)
Andaman & Nicobar Islands	2.16	2.01 -06.9)	2.07 (03.0)	1.68 -(18.8)	1.21 -(28.0)	1.07 -11.6)	1.15 (07.5)	1.51 (31.1)	0.75	0.75 (00.0)

Figures in bracket represents percentage change over the previous year/period. P- Provisional

The cargo handling capacity at Puducherry is estimated 200,000 tonnes of cargo per annum. In January 2006, the Government of Puducherry entered into a concession agreement with private developers for the development of deep water ports on BOT basis at Puducherry and Kariakal. The development work at Kariakal port has begun and commercial operations started in April 2009.

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

Table 25 - Union Territories: Trends in Cargo Handled at Non-Major Ports (Million Tonnes)

Major/Non-Major	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15(P)	April-September	
									2014-15(P)	2015-16(P)
Lakshadweep	0.03	0.03	0.03	0.03	0.03	0.03	0.12	0.12	0.06	0.06
Puducherry	0.01	0.05	1.32	4.71	6.42	6.91	6.28	4.96	2.76	2.88

3: PERFORMANCE INDICATORS

3.1 Capacity Utilization

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

Table 27 - Major Port-wise Capacity Utilization During 2014-15 (Million Tonnes)

Name of the Port	Capacity	Traffic	Capacity Utilisation(%)
Kolkata Dock System	21.1	15.28	72.42
Haldia Dock Complex	49.75	31.01	62.33
Paradip	119.8	71.01	59.27
Visakhapatnam	96.76	58.00	59.94
Ennore	37	30.25	81.76
Chennai	86.04	52.54	61.06
Tuticorin	44.55	32.41	72.75
Cochin	49.66	21.60	43.50
New Mangalore	77.77	36.57	47.02
Mormugao	43.76	14.71	33.62
J. L. Nehru	79.37	63.80	80.38
Mumbai	44.53	61.66	138.47
Kandla	121.43	92.50	76.18
ALL PORTS	**871.52**	**581.34**	**66.70**

3.2 Cargo Traffic Targets and Achievement upto September, 2015 for Major ports.

Achievement upto September,2015 against the projected targets of 2015-16 is given in **Table-27-A.**

Table: 27-A: Annual Cargo Traffic Targets during 2015-16 and achievement upto September,2015 (In Million Tonnes)

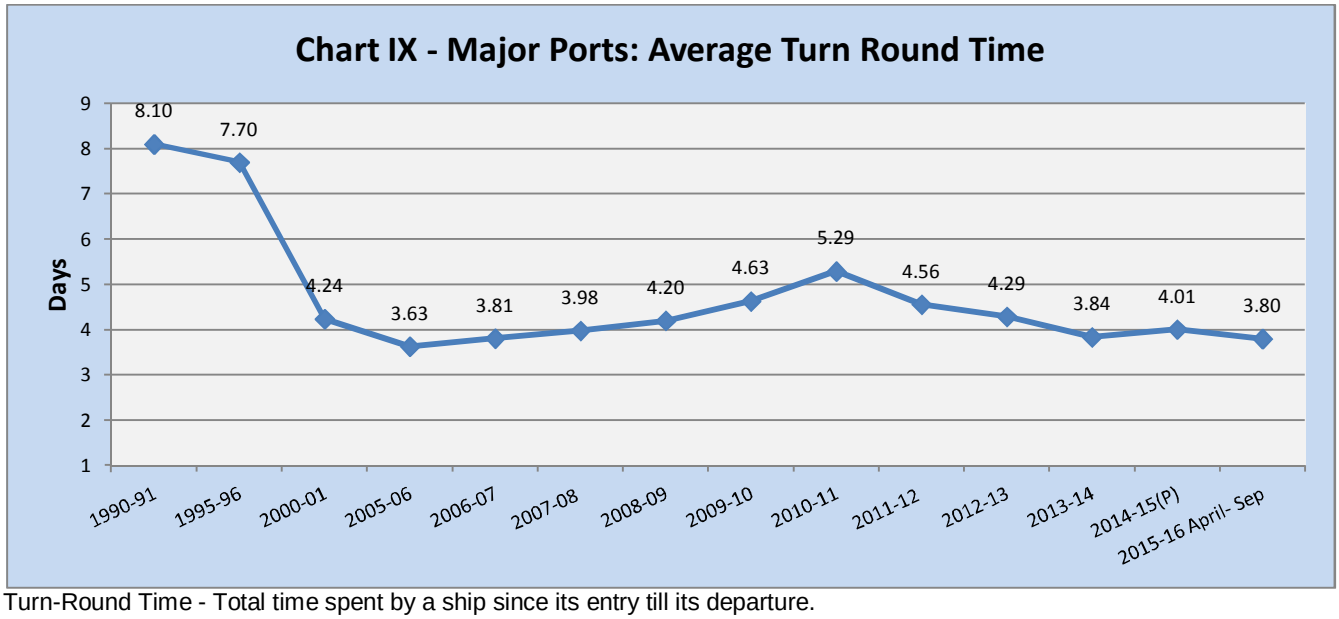
S.No.	Name of Ports	Targets	Traffic upto April-Sept,2015)	% age Achievement
1	Kolkata Ports of Trust	15.0	8.0	53.5
2	Haldia Dock Complex	39.7	17.2	43.3
3	Paradip Port Trust	78.2	36.1	46.1
4	Visakhapatnam Port Trust	77.1	27.6	35.8
5	Ennore Ports Limited	32.2	16.0	49.7
6	Chennai Port Trust	63.3	25.8	40.8
7	VOC Port Trust	36.8	18.7	50.8
8	Cochin Port Trust	27.1	11.3	41.6
9	New Mangalore Port Trust	48.3	17.0	35.2
10	Mormugao Port Trust	15.4	8.1	52.8
11	Mumbai Port Trust	72.5	31.1	42.9
12	Jawaharlal Nehru Port Trust	74.8	32.3	43.2
13	Kandla Port Trust	115.0	50.4	43.8
	Total	**695.12**	**299.6**	43.1

3.2 Port Efficiency

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

Average Turn-Round Time (TRT)

3.2.2 This parameter has improved significantly during the past one and half decades for all the major ports. Average TRT for all major ports improved from 8.10 days in 1990-91 to 3.63 days in 2005-06. Thereafter the TRT has increased steadily to 5.29 days in 2010-11. In 2011-12, the average TRT declined to 4.56 days and further to 3.84 days in 2013-14. However, TRT increased to 4.01 during 2014-15. The TRT declined to 3.80 during the first half 2015-16. The TRT varied in the range between 1.77 days at Cochin Port to 7.01 at Paradip during 2014-15. However, the TRT varied in the range between 1.71 days at Cochin Port to 6.43 at Kamarajar during the first half of 2015-16. Amongst the 12 major ports, improvement in TRT during first half of 2015-16 in comparison to the same period in 2014-15 is reflected clearly for most of the Major Ports except Haldia DC, Kamarajar, Chennai, Chidambaranar, New Managalore and JNPT. 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 2015-16(April-Sept.) is presented in the **Chart IX** below.



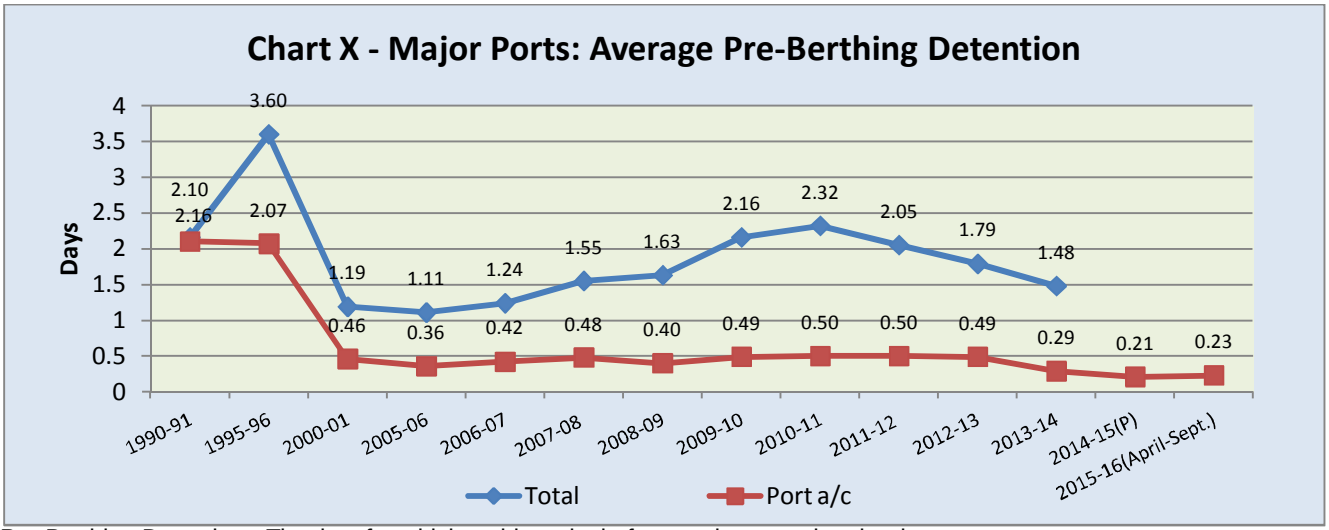
Turn-Round Time - Total time spent by a ship since its entry till its departure.

Table 28: Average Turn Round Time (days)											
Port	1990-91	2000-01	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15(P)	April-September	
										2014-15(P)	2015-16(P)
1	2	3	4	5	6	7	8	9	10	11	12
Kolkata D.S	11.90	5.50	5.10	6.80	6.21	5.45	4.72	4.51	4.18	4.02	3.89
Haldia D.C	6.47	3.97	4.21	5.01	4.45	3.62	3.95	3.77	3.37	2.87	3.09
Paradip	8.40	4.16	4.78	9.04	7.73	6.33	4.39	4.62	7.01	5.71	5.32
Vishakhapatnam	7.07	3.71	3.93	4.78	5.84	5.68	5.39	4.73	5.67	5.36	4.38
Ennore(Kamarajar)	-	-	2.35	2.11	2.78	2.17	2.95	4.24	4.32	4.59	6.43
Chennai	7.20	5.83	4.15	4.04	4.36	3.91	3.24	2.46	2.54	2.54	2.57
Tuticorin(Chidambarnar)	4.70	4.10	3.64	3.90	4.00	4.94	4.31	3.92	3.55	3.72	4.04
Cochin	4.00	3.11	2.14	2.08	2.20	1.82	1.58	1.76	1.77	2.04	1.71
New Mangalore	4.96	2.89	3.00	3.06	2.70	2.95	3.29	3.18	2.46	2.54	2.80
Mormugao *	6.40	4.25	5.95	8.91	10.43	7.68	5.06	4.50	4.15	4.57	3.70
J.L.Nehru	-	2.21	1.90	2.01	2.64	1.94	2.48	2.26	2.24	2.32	2.82
Mumbai	10.80	5.20	4.95	4.61	4.96	5.22	5.58	4.25	5.28	5.12	4.19
Kandla	10.00	4.72	7.26	5.03	5.90	6.42	6.33	5.66	5.38	5.57	5.06
All Ports	8.10	4.24	4.20	4.63	5.29	4.56	4.29	3.84	4.01	3.91	3.80

(P) Provisional
* Refers to dry bulk cargo for MOHP(Mech.) and Berth No. 10 &11 (Conv) Source: Major Ports/ Indian Ports Association (IPA)

Average Pre Berthing Detention Time (PBDT)

3.2.3 The average overall pre berthing detention time for all major ports declined from 2.2 days in 1990-91 to 1.63 days in 2008-09. However, in 2009-10 and 2010-11, the average PBDT edged up to 2.16 days and 2.32 days respectively. In contrast, average PBDT on port account has seen a sharper decline from 2.10 days in 1990-91 to 0.50 day in 2010-11. Average PBDT on port account which remained same at 0.50 days in 2011-12 and 2012-13 declined to 0.29 days in 2013-14 and further declined to 0.21 days in 2014-15. Average PBDT on port account during first half of 2015-16(April-Sept.) moved to 0.23 days. Port-wise PBD for select years is indicated in **Table 29.** The trajectory of weighted average of pre berthing detention time at Major ports- total and on port account -during 1990-91, 1995-96, 2000-01, 2005-06 onwards is shown in **Chart X** below.



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

Table 29 : Average Pre-Berthing Detention(Days)

Port	1990-91	2000-01	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15(P)*	April-September	
										2014-15*	2015-16*
1	2	3	4	5	6	7	8	9	10	11	12
Kolkata D.S	0.9	0.61	0.66	1.31	1.23	0.77	0.61	0.56	0.01	0.00	0.01
Haldia D.C	1.66	0.91	3.38	4.39	3.73	2.54	2.29	2.21	0.49	0.20	0.19
Paradip	1.59	1.41	2.32	6.30	5.04	3.69	1.65	1.94	0.04	0.04	0.05
Vishakhapatnam	1.83	0.75	1.28	1.90	2.81	2.84	2.50	1.84	0.08	0.08	0.06
Ennore			0.27	0.37	0.65	0.76	1.33	2.38	0.00	0.00	0.00
Chennai	2.1	2.45	1.39	1.35	1.61	1.16	0.80	0.41	0.03	0.00	0.00
Tuticorin	0.9	1.4	1.09	1.36	1.29	1.91	1.31	1.19	0.16	0.16	0.38
Cochin	0.83	0.74	0.7	0.85	1.03	1.05	1.09	0.97	0.08	0.09	0.68
New Mangalore	0.79	0.77	0.65	0.81	0.59	0.79	1.04	0.81	0.01	0.01	0.05
Mormugao**	2.51	1.32	1.77	3.46	4.07	2.94	1.62	1.47	0.25	0.38	0.22
J.L.Nehru		0.67	0.95	0.98	1.51	1.13	1.31	1.08	0.41	0.46	0.50
Mumbai	3.4	1.26	1.41	1.06	1.23	1.37	1.62	1.18	0.30	0.25	0.42
Kandla	4.4	1.51	2.62	2.60	3.32	3.74	3.58	2.72	0.40	0.44	0.23
All Ports	2.16	1.19	1.63	2.16	2.32	2.05	1.79	1.48	0.21	0.19	0.23

(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.)

Average Output Per Ship Berth-day

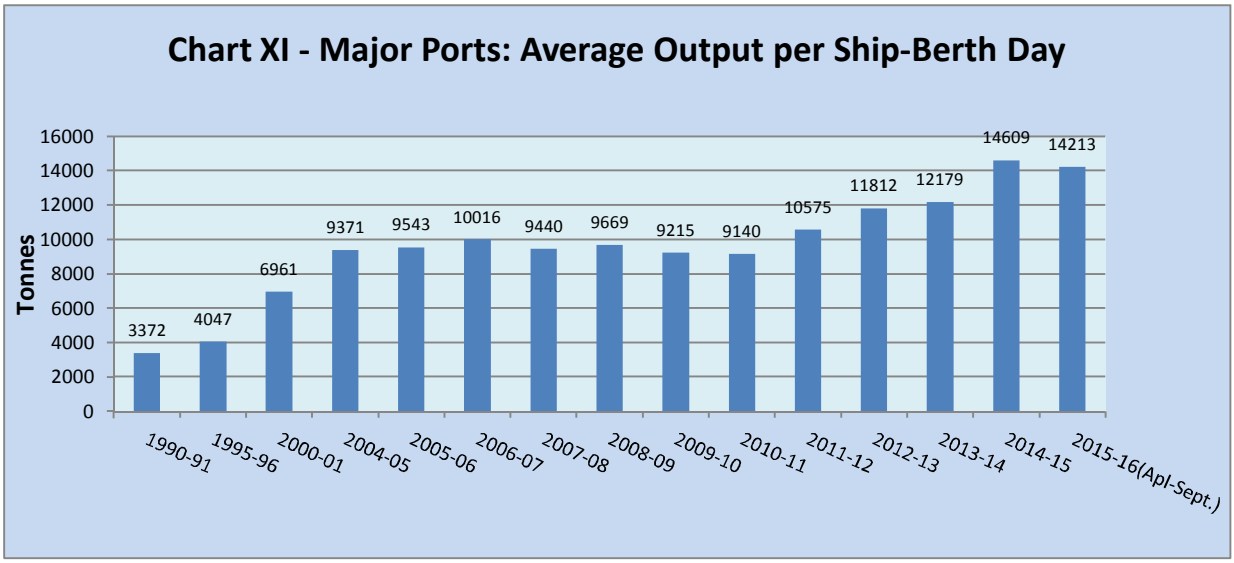
3.2.4 During the last 25 years this indicator has seen a tremendous improvement. Average Output per Ship-berth day has increased more than four times from 3,372 tonnes in 1990-91 to 14609 tonnes in 2014-15 for major ports. However, average output per ship berth day is marked by substantial variation across major ports ranging from a high 30004 tonnes in case of Kamarajar port to a low of 3844 tonnes at Kolkata Dock System during 2014-15. This variation reflects the type of cargo being handled, level of mechanization and labour practices. Amongst the 12 major ports, improvement in average Output per Ship Berth-day during first half of 2015-16 over the corresponding period of the previous year is visible in all the ports except Haldia D.C, Cochin, New Mangalore, and JNPT. Average Output per Ship-berth day during the first half of 2015 (April-Sept.) is 14213 tonnes compared to 14254 tonnes over the corresponding period of the previous year. Port-wise average output per Ship-berth day for select years and latest period are given in **Table 30.**

Table 30 : Average Output per Ship-Berth-Day (Tonnes)

Port	1990-91	2000-01	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	April-September	
										2014-15(P)	2015-16(P)
1	2	3	4	5	6	7	8	9	10	11	12
Kolkata D.S	560	2305	3027	1917	2253	2503	2762	2963	3844	4108	4122
Haldia D.C	5659	6384	7732	6243	6563	6728	6078	6130	6802	7037	6919
Paradip	4082	8503	12635	13853	14243	15995	16625	18179	17736	16967	18740
Visakhapatnam	5325	9799	11171	10484	10334	10704	10641	10925	10638	10430	11733
Ennore	-	-	28424	21665	17699	27505	27741	22357	30004	29703	32354
Chennai	3912	6977	10778	11428	10984	10352	12046	14268	15419	14535	16636
Tuticorin	2130	3983	5817	6934	7035	6733	7452	9633	10147	9862	10035
Cochin	3714	6138	10599	11089	11752	15784	15878	15881	16770	15982	14811
New Mangalore	4412	12192	13645	13896	14211	13957	15921	16314	19414	18621	16256
Mormugao*	10429	12438	6290	5002	4409	10530	11484	10018	11332	10276	12807
J.L.Nehru	-	6383	20344	21563	20393	19227	23319	23014	24411	24323	20592
Mumbai	2310	4213	5717	6122	6042	6476	8709	7057	7619	7266	8408
Kandla	4417	8230	13107	13549	14137	14272	15728	15729	16457	15762	16087
All Ports	3372	6961	9669	9215	9140	10575	11812	12179	14609	14254	14213

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

3.2.5 The average out-put per ship-berth-day for selected years since 1990-91 to 2015-16(April-Sept.) is presented in the **Chart XI** below.



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

4. PRIVATE SECTOR/CAPTIVE/JOINT SECTOR PORT PROJECTS

Brief details of the ongoing Private Sector/Captive/Joint Sector Port Projects and a list of these projects under consideration as on 30.9.2015 are brought out in Appendix-I & Appendix-II in respect of Major Ports and in Appendix-III & Appendix-IV for Non ï Major Ports.

APPENDICES

I. On going Private Sector/Capative/ Joint Venture Port Projects at Major Ports

II. Under Formulation Private Sector/Capative/ Joint Venture Port Projects at Major Ports

III. On going Private Sector/Capative/ Joint Venture Port Projects at Non-Major Ports

IV. Under Formulation Private Sector/Capative/ Joint Venture Port Projects at Non- Major Ports

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

Sl. No	Project Name	Port Name	Capacity (Million Tonnes)	Project Cost (Rs. Crores)	Project Status
1	**2**	**3**	**4**	**5**	**6**
1.	Development of Container Terminal on DBFOT basis	Kamarajar Port Ltd	16.8MT	1270	-Concession Agreement signed with the Concessionaire Adani Ennore Container Terminal Pvt. Ltd. on 15.3.14 -Award of Concession for Phase-I Development (400 m quay length) was granted to the Concessionaire on 20.10.14. -The Concessionaire has commenced the Phase-I Terminal Construction work.
2	Development of Multi Cargo Terminal on DBFOT basis	Kamarajar Port Ltd	2.00	151	Concession Agreement signed with the Concessionaire M/s Chettinad International Bulk Terminal Pvt. Ltd. on 28.3.14 -Award of Concession was granted to the Concessionaire on 24.04.15. -The work has commenced.
3	Construction of Coal Berth No.3	Kamarajar Port Ltd	9.00	198.95	LOA was issued to M/s ITD Cementations Ltd and Date of commencement reckoned from 21.2.15 Pre Project activities are in progress.
4	Construction of two New Off-shore Container berths & Development of Container Terminal berth on BOT basis in Mumbai Harbour.	Mumbai Port	9.60MTPA (1.00 Mn TEUs)	1461	**BOT Component**- Entire Approach jetty is ready. Berth structure completed. Total investment till date is Rs. 627.25 crores. M/s. ICPTL has proposed to procure container handling equipment from 2 Chinese vendors. Details of vendors have been forwarded to ministry on 31.7.14 for security clearance. Development of contaianer yeard in Pricess Dock is in progress. **MbPT component**- Fresh tenders for balance work of dredging and filing dock enclosure have been invited. i) The Board in its meeting held on 25.4.14 has accepted the bid of M/s International Seaport Dredging Ltd., for award of work subject to Govt. sanction to RCE, which is yet to be received. ii) Work order for balance filling work and dock closure placed on 4.4.14. Work of Princes Dock filling completed. Victoria Dock filling work is in progress. RCD work is in progress. iii) Trial operation of berth facilities has been successfully done on 26.11.14. The Board on 16.1.15 has approved alternate use of OCT project for handling automobiles with revenue sharing on trial basis for a period of 3 months.

5	Multi-User Liquid Terminal (MULT) at Puthuvypeen SEZ (International Bunkering Terminal at Cochin)	Cochin Port	4.42 MMTPA	240	GoI's in principle approval for assigning the MULT projects to IOCL on nomination basis given on 11.3.13. The project was assigned to IOCL subject to certain conditions. The concession Agreement signed with IOCL on 04/04/2014. Application to KSPCB for conducting public consultation and application to KCAMA for CRZ clearance for MULT project wer submitted on 11.6.14. A fresh on line application to MoEF for obtaining Environmental Clearance uploaded on 16.4.15 after changing the project sector from Industrial to Infrastructure and Misc. Projects + CRZ. DC, SEZ conveyed the approval of the Ministry of Commerce & Industry on 12.8.14 to M/s IOCL for undertaking additional activities in consultation with development of MULT in Puthuvypeen SEZ. M/s IOCL have entrusted CoPT with execution of construction of jetty and its associated facilities through EPC contractor. M/s L&T Ramboll Consultin Engineers Ltd. Chennai was entrusted with preparation of FEED Document and Bid document for the Development of MULT. On tendering two bids on due date. Price bid of the one prequalified bidder opened and IOCL's concurrence for awarding the contract is awaited. For Capital Dredging for Mult Basin, letter of intent has been issued to M/s DCI on 17.08.2015.
6	Setting up of Mechanized Iron Ore handling facilities at berth No. 14 by M/s. SICAL Logistics Limited on BOT basis.	New Mangalore Port Trust	6.62 MTPA (Capacity of Jetty)	296.03	The concession was awarded to M/s SICAL on 03.06.2010. The Concessionaire has not commenced the work due to ban on export & movement of iron ore imposed b Karnataka Govt. The Concessionaire has requested to excuse for performance under Force Majeure clause. M/s. SICAL was given one more opportunity to commence the work before 8.4.2014 and give milestone accordingly, failing which necessary action may be taken to terminate the contract as per the provisions of Concession Agreement. As resolved by the Port Trust Board a letter to M/s. SICAL is issued on 08.10.2013. & reminder letter sent on 09.01.2013 reply is awaited. Programme is not yet submitted by M/s. SICAL. M/s. SICAL has filed writ petition against the board of Trustees NMP under article 226 & 227 of constitution of India. Hon'ble High Court has given interim order date 20 February 2014 in the said W.P. disposal of writ petition:- 1. Stay any further action that may be taken in relation to termination of the concession agreement between the Board of Trustees of the NMPT & M/s. SICAL. 2. Stay of the enforcement of any of the terms of the invoking / encashing the Bank Guarantee issued on behalf of M/s. SICAL in terms of the Concession Agreement and from receiving any money under bank guarantee. Port is in process of vacating the stay. Hearing of the case has been completed and judgment may be pronounced on the next date.
7	Development of Barge handling facility at Bharathi Dock	Chennai	1.35 MTPA	27.29	Concession agreement signed with Chennai Bunkering Terminal Pvt. Ltd., on 30.3.2013. Due to non-receipt of environment clearance, the concessionaire has requested to grant extension of time till 19.10.2015.

8.	Development of EQ-1A berth on south side of EQ-1 berth in Inner Harbour for handling Thermal coal and Steam coal at IH.	Visakhapatnam	7.36	313.39	Physical progress is 71 % Expected completion by January, 2016. Concession Agreement signed on 03.02.2014 with M/s. SEQ Vizag Coal Terminal Pvt. Ltd.,
9.	Installation of mechanized Fertilizer handling facilities at EQ-7 at IH.	Visakhapatnam	5.21	217.58	Concession agreement signed on 18.05.2012. Letter of award given on 18.04.2013. Concessionaire has to submit 5 yrs. License fee as refundable security deposit. Termination notice issued on 05.04.2014.The concessionaire has filled Writ petition in High Court, Hyderabad.
10.	Up-gradation of the existing facility (OHC) and creating new facility (WQ-1) for iron ore handling.	Visakhapatnam	23	845.41	LOA issued on 31.05.2013 to M/s Vadinar Oil Terminal Ltd. Concessionaire was awarded on 14.05.2015. Phase I construction started from 14.05.2015.
11.	Extension of existing Container terminal in outer harbor.	Visakhapatnam	0.54 MTEUs	633.11	LOA issued to M/s VCTPL on 31.12.2013. Concession agreement is to be signed. Selection of independent Engineer is in progress.
12.	Development of Deep Draft Coal Berth on BOT basis	Paradip Port	10.00	479.01	Project site has been cleared and PPT has communicated the same to ESSAR on 10.3.15 informing to deposit the license fees and take over physical possession of the site including submitting documents for fulfillment of their conditions precedent.
13.	Conversion of berth No. 8 as container terminal on.	Tuticorin	7.2 MTPA	312.23	LOA issued to M/s Dhakshin Bharath Gate way Terminals Pvt. Ltd. 7.8.12 with a gross revenue share of 55.19%. Concession Agreement signed on 4.9.12. Work is in progress. Two number of reach stackers arrived and firm has taken action to purchase shore crane. M/s STUP Consultant, Chennai is appointed as Independent Engineer for the project. Partial operation has started on 11.5.2014.
14.	Construction of One Number of Shallow Draught Berth on DBFOT Basis.	Tuticorin	2.67 MTPA	84.08	LOA issued to M/s Transstroy – OJSC consortium on 31.12.12 with a Gross revenue share of 22%. Concession Agreement signed on 17.4.13. Revalidation of Environmental Clearance received from MOEF vide letter dated 31.03.2014. Consent to establish obtained by the concessionaire from TNPCB vide letter dated 21.02.2014. Further action in being taken to handover the project to the PPP operator.
15	Development of North Cargo Berth – II on DBFOT basis.	Tuticorin	7.0 MTPA	332.16	The Concession agreement signed with concessionaire M/s Tuticorin Coal Terminal Pvt. Ltd. Mumbai on 11.9.2010. About 90% of work completed at site physically. Tender process completed to carry out dredging work in front of the Berth by the Port and environment clearance from MOEF received. Security clearance issued at Port level on 30.06.14 for import of equipment from China.
16	Development of North Cargo berth –III	Tuticorin	9.15	420	V.O.CPT accorded approval to issue LOA in favour of the H1 Bidder M/s. Transstroy OJSC Consortium at a Gross Revenue Share of 30%. The concession Agreement signed on 07.02.2014. Capacity Addition of 9.15 MTPA. Concessionaire requested the Port to grant 3 months time to fulfill the condition precedents and time has been granted by Port upto 10.11.2015.
17.	Development of North Cargo berth –IV	Tuticorin	9.15	355.0	LOA was issued to M/s Transstroy OJSC Consortium on 30.01.2013 at Gross Revenue share of 30% concession Agreement signed on

					17.04.2013. On the request of Concessionaire the port has granted the time upto 10.11.2015 to fulfill the condition precedent and to take over the project site.
18.	Development of Fourth Container Terminal at JNP on DBFOT basis	JNPT	60 MTPA	7915	The Concession is awarded to Bharat Mumbai Container Terminals Pvt. Ltd. On 22.12.14. Concessionaire has awarded the work of dredging and reclamation. The reclamation work commenced in March, 15.
19.	Development of standalone handling facility with a quay length of 330 m to the North at JNPT	JNPT	10 MTPA	600	The Concessionaires are completed the wharf construction work. RMQCs are installed, JNP Board has allowed for partial commissioning of the Operation.
BOT: Build Operate and Transfer; BOO: Build Own Operate; DBFOT: Design, Build, Finance, Operate and Transfer.					

Appendix – II

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

Sl. No	Project	Port Name	Capacity (Million Tonnes)	Project Cost (Rs. In crores)	Project Status
1	2	3	4	5	6
1.	Development of Multi-Purpose berths to handle clean cargo including container on BOT basis at Paradip Port.	Paradip Port	5.0 MTPA	430.78	Concession Agreement has been signed with the SPV "Paradip International Cargo Terminal (Pvt.) Ltd (PICTPL) on 7.3.15 with revenue share of 11.044%. PICTPL has sought time till 12.12.2015 for fulfillment of condition precedents.
2.	Mechanization of EQ 1 to EQ 3 berths at Paradip Port on BOT basis.	Paradip Port	30	1437.76	Fresh RFQ has been floated on 14.08.2015 with due date of RFQ as 28.09.2015.
3.	Development of Deep Draught Iron Ore Berth on BOT basis at Paradip Pot.	Paradip Port	10	740.19	Letter of Award has been issued in favour of H1 bidder i.e. consortium of JSW Infrastructure Ltd. & South West Port Ltd. on 5.2.15 at 21 % revenue share to the Port. The Project is in the stage of fulfillment of condition precedent including financial closure.
4.	Development of LNG Terminal	Kamarajar Port Ltd	5.00	5151	Concession agreement signed with SPV company M/s Indian Oil LNG Pvt. Ltd. on 31.07.2015.
5.	Construction of Coal Berth-4	Kamarajar Port Ltd	9.00	325	KPL has issued LOA to M/s Afcons Insfrastructure Ltd, Mumbai for construction of berth.
6.	Development of Marine Liquid Terminal -2 on DBFOT Basis	Kamarajar Port Ltd	5.00	-	DFR has been prepared by Project advisor.
7.	Development of Second Automobile Export Terminal on DBFOT Basis	Kamarajar Port Ltd	3.00	-	DFR is under preparation.
8	Dredging & Infrastructure development for handling bigger ships at 18 to 22 ID Harbour Wall Berths.	Mumbai	8.00 MT	613	Due to poor response to the project as suggested by M/s RITES, it is proposed to scrap the project.
9	Development of off-shore multipurpose cargo berth	Mumbai	4 MT	696	The project is earmarked for implementation through PPP mode. - M/s RITES has been entrusted with the work of updating the project report vide letter dated 28.8.14. Report not yet submitted by M/s. RITES. - Application for TOR for EIA/RA study, required for prior Environmental Clearance of the project forwarded to Secretary, Environmental Department, GOM on 16.4.13, - Approval to TOR received.

10.	Development of facilities for handling & storage of bulk cement	Mumbai	1.25 MT	95	The tender for leasing of 2.5 Ha of land for 30 years lease has been awarded on 23.3.15 for development of Cement Terminal.
11	Award of Project for Base Oil Terminal	Mumbai	-	-	The project is temporarily kept in abeyance as the site is under consideration of MPLDC.
12	Development of Marina- Off P & V Dock Wall	Mumbai	-	-	The earlier Tender on Land lease model has been cancelled. It has been decided to re-invite the Tender on Revenue share Model.
13	Barge handling facilities at Khori Creek	Kandla	4	100	Under planning stage.
14.	Construction of T shape Jetty at Tekra (Phase-II)	Kandla	14	1500	The scheme will spill over in 13th five year plan. Under planning stage.
15.	Setting up of barge jetty at Tuna on captive use basis	Kandla	1.5	22	EOI invited. Only M/s Shree Renuka Sugars has submitted application till due date. Committee recommended the proposal submitted by M/s Shree Ranuka Sugars and also recommended to put up to the Board for approval.
16	Construction of barge jetty at Tuna on BOT basis	Kandla	5.49	255.3	Feasibility Report, RFQ and TAMP proposal under approval.
17	Strengthening of oil jetty 1 at KPT	Kandla	0.78	14.29	LOA issued to M/s Indiana build infrastructure pvt. Ltd., Mumbai on 18.03.14. work order issued on 20.5.2014. Work has been completed.
18	Development of Port based multi product SEZ	Kandla	-	1095	In-principle approval from MoS for formation of SPV is awaited. Concurrence of GoG is still awaited. KPT has appointed NIO, Mumbai for carrying out EIA studies.
19	Development of General Cargo Terminal at Q8-Q9 berths (Modernization of Coal Handling at Cochin Port)	Cochin Port	4.23 MTPA of Coal	198.2	The project was to develop a 300 metre berth length of Q8-Q9 berths as a dedicated Coal only terminal, with 14.42 ha of backup area and involving investment of around Rs. 198 crores. Tenders were invited thrice for the project, no response was received. During the review meeting on 24.2.15, it was decided to rejig the project by providing 14.5 m draft and decking the 300 m stretch of the berth and also revising the cost estimates of the existing components and apply for VGF to Govt. of India to improve the IRR. The assignment for providing consultancy services for preparation of a Feasibility Report for Development of a Coal Terminal at Cochin Port is awarded to M/s Alia Consulting Solutions Pvt. Ltd., Mumbai on 31.3.15. The final feasibility study report as submitted by consultant on 21.05.2015. Study shows that scope of terminal is not bright. Hence it is decided to shelve the project.
20.	Construction of 1 No. shallow water berth for handling construction materials	Tuticorin	2.00 MTPA	65.37	Court case filed by M/s Indian Port Terminal, Tuticorin. The matter is at Hon'ble Madras High Court, Chennai. Next date of hearing is yet to be announced.
21.	Development of Outer Harbour (17 Nos. of berth including constructions of Breakwater and Dredging)	Tuticorin	19.20 MTPA (16,00,000 TEUs	23431.92	During the review meeting dated on 03.08.2012, a decision was taken to go for preparation of fresh DPR since the existing one was prepared in 2007 and there was much variation in the traffic profile. Accordingly Global NIT was published. After evaluation, work order for the preparation of Detailed Project Report was issued to M/s. i-Maritime, Mumbai on 26.02.2013 with a contract period of 9 months from the date of award of work order. The firm has presented the draft DPR in the final DPR on 19.10.2013. As per the final DPR channel is (-) 18m. The total cost of the project is Rs.23431.92

					Crores in four phases. The first phse is Rs. 11,636 Crores which consists of Dredging, breakwater and road of Rs. 7241.89 Crores including interest during construction and the balance to be borne by the PPP operators. Total traffic for phase – I is 85.8 Million Tonnes per annum. On completion of four phases port will have a capacity addition of 290 MTPA. Investment by Port for Phase 2, 3, & 4 developments is nominal and main investment will be made by the PPP operators A fresh application seeking approval for Terms of Refrences submitted toMOEF on 5.03.2014. EAC prescribed to conduct public hearing. Accordingly offers called from accredited agencies for conducting EIA studies on 27.8.2014. Five offers received and tender opened on 15.09.2014. Work order issued. Mathematical Physical model study being carried out by CWPRS, Pune. Action is being taken to conduct bore hole investigation and hydrographic survey and seismic survey for finalization of Break water layout and dredging quantities. Port has engaged M/s I.P.A for revalidating the D.P.R submitted by M/S i-maritime.
22.	Development of Mega Container Terminal. (Development of a new Outer Harbour on BOT basis	Chennai Port Trust	(48 MTPA)	5100	The mega container terminal project is being restructured and port has appointed M/s. Ernst & Young as consultant for preparing feasibility study and TA.
23.	Development of Rajiv Gandhi Dry Port and Multi Modal Loistic Hub at Mappedu near Sriperrumbudur; under PPP mode	Chennai Port Trust	18.45 MTPA	415	Lease Deed executed for 120.85 acres and 0.89 and 0.89 acres on 29.6.2012 and 20.3.2013 respectively for the total land area 121.74 acres accquired for SIPCOT handed over the land area and taken over by Chennai Port on 31.05.2013. On the bid due date, no bids were received. Project restructuring options placed in the Board Meeting held on 03.08.2013. Proposal invited on tender-cum-auction basis for a period of 30 years based on the latest “Land Policy Guidelines 2014” Two offers received for 14.96 acres only. Letter of Intent issued to the Sucessful bidder Ennore Cargo container Terminal on 04.07.14. subject to issue of LOA will be issued on receipt of written consent form SIPCOT for sub-lease SIPCOT has demanded License Fee for sub-lease. In reponsem ChPt requested SIPCOT not to insist for payment of license fee, for which a reply is awaited from SIPCOT Tender re-invited for balance portions from 25.09.2014.
24.	Development of Dry Dock /Ship Repair facility at Timber pond/Boat basin in Chennai Port on Private Sector Participation (Land Lease Model) for a lease period of 30years	Chennai Port Trust		315	it has been decided to re-invited the tender with same scope of work as CSL is not interested to take up the project Tenders were re-invited with the Terms & conditions as in original invitation. Sale of tender document is from 26.6.14. Second Pre-Bid meeting held on 10.10.2014. Bid submission extended up to 12.11.14. Apart from private bidders, Coast guard has also expressed interest in participating in the project.
25.	Development of Marine Highway along East Coast connecting Chennai and Kamarajar Ports	Chennai Port Trust		6	Tenders for marine Highway Project were invited from 5.3.2014. and extended successively upto 7.1.2015 and not bids were received. Hence, as directed by the Chairman, the stake holders meeting was conducted to frame a new proposal including demonstrating with the pilot scheme. In continuation of the above, a new proposal was submitted by the prospective bidder which was placed before the

					Board on 2.4.2015. After the approval of the Board, notice inviting proposal (1.5.2015) has been published so as to start the container shuttle service by September, 2015. Further course of action is being taken by Traffic Department.
26	Development of JD (EasT) berths as Multi-cargo Terminal	Chennai Port Trust	5	369	The Supreme court adjourned the case for final hearing to November, 2015 on the receipt on the report on the dust free handling of Coal. If Supreme Court allows coal handling JD (E) will develop as Coal Terminal.
27.	Construction of a riverine jetty south of 2nd Oil Jetty through DBFOT Basis.	Haldia Dock Complex under KoPT	1.5 MTPA	471	Feasibility Study being undertaken, following which RFQ document would be issued.
28.	Construction of a riverine jetty south of 2nd Oil Jetty through DBFOT Basis.	Haldia Dock Complex under KoPT	1.5 MTPA	471	Feasibility Study being undertaken, following which RFQ document would be issued.
29.	Construction of a riverine jetty south of 2nd Oil Jetty through DBFOT Basis.	Haldia Dock Complex under KoPT	1.5 MTPA	471	Feasibility Study being undertaken, following which RFQ document would be issued.
30.	Construction of a riverine jetty south of 2nd Oil Jetty through DBFOT Basis.	Haldia Dock Complex under KoPT	1.5 MTPA	471	Feasibility Study being undertaken, following which RFQ document would be issued.
31.	Construction of a riverine jetty south of 2nd Oil Jetty through DBFOT Basis.	Haldia Dock Complex under KoPT	1.5 MTPA	471	Feasibility Study being undertaken, following which RFQ document would be issued.
32	Deepening of Approach channel for Cape size vessels at Mormugao Port	Murmugao	2.00 MMTPA	301	1.M/s WAPCOs has been appointed for carrying out Environment impact Assessment (EIA) study 2. Work order issued to M/s CWPRS for carry out Mathematical Model studies for Hydrodynamics and sedimentation. 3. The Board has apaproved on 8.4.2014 to carry out the project on Annunity model. NIT has been floated on 17.4.2015. RFQ opened on 30.5.2015. 4.RFP issued on 1.9.2015. Opening date of RFP is fixed on 23.10.2015.

33	Development of Port Handling Facilities for the 1st Phase of the Master Plan. i)Conversion of the existing Mechanical Ore Handling Plant(MOHP), Berth No.8, Berth No.9 and Barge Berths to Multipurpose Cargo berths ii) Shifting of the existing POL Handling Facilities from Berth No.8 to an offshore location between Mooring Dolphins 1 & 2 iii) Development of Dry Port at Belgaum	Murmugao	9.00 MMTPA 2.00 MMTP 30000TEUs	525 200 15	1. Consultancy work for preparation of feasibility report of the project has been awarded to TATA Consulting Engineers Ltd., Mumbai on 8.6.2015. The schedule date for submission of the Report is 7.11.2015. 2. Concept report was submitted by the consultant on 30.9.2015.
BOT: Build Operate and Transfer; BOO: Build Own Operate; DBFOT: Design, Build, Finance, Operate and Transfer.					

Appendix – III

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

Sl. No	Project Name	State/ Ports Maritime Board	Capacity (Million Tonnes)	Project Cost (Rs. In Crore)	Project Status
1	2	3	4	5	6
1.	Development of Mundra Port	Mundra (Gujarat)	160	12305	Construction of 4 berths alongwith backup facilities has been completed. **Phase-I of the Project completed & Operational** 1.810 m Multipurpose jetty 2.1843 m container terminal & T-2 3. 1 SBM and other back up facilities **Phase-2:** 1. 1510 m Coal Terminal, Wandh-Operational 2. 810 m Container Terminal Operational 3. Second SBM Operational 4. Multipurpose 3 Operational 5. Out of two proposed LNG Berths under Phase-II, Proposal for granting in principle approval to be developed in JV with GSPC LNG Ltd., has been submitted to GOG. The same is yet to be received. Meanwhile construction permission to GLL has been issued. 6. In-Principle approval has been granted to M/s ACMTPL for development of Container Terminal 4. Construction is in progress.
2.	Hazira Port Pvt. Ltd (HPPL)	Hazira (Gujarat)	2.50 (MMTPA)	1180	Phase 1 A (LNG Terminal) completed and operational.
3.	Development of BGCT under phase IB at Hazira.	Hazira (Gujarat)	24.6	267.6	Completion of construction of the following: 1) 2 container berths and 3 general cargo berths 2) breakwater 3) backup facility for handling the cargo.

4.	Development of Solid Cargo Port Terminal	Dahej (Gujarat)	15	84	Two solid cargo berths with cranes completed 1) Backup area constructed 2) Conveyor system for berths no. 1 completed as per DPR.
5.	Captive jetty by Cairn Energy India Pvt. Ltd. Bhogat Dist. Jamnagar	Bhogat (Gujarat)	7	1285	Construction completed, landing place declared. Agreement to be signed after GOG approval.
6	Captive Jetty by JP Associates Limited Jakhau Port	Jakhau Port	3	140	Made operational, But JAL jetty is taken over by Ultra Tech Cement and jetty became non-operational since June 2013. Recently, GMB has granted the change of company.
7.	Captive Jetty by Essar Salaya Bulk Terminal Limited.	Salaya (Gujarat)	7	600	The Construction of Jetty is completed. Approach bund is under construction.
8	Captive Jetty by ABG Cement Ltd	Hazira Mora (Gujarat)	2	100	Construction permission granted. Extension in construction period is granted by the Board in its meeting held on 28.09.2015.
9	Captive Jetty by M/s. Essar Bulk Terminal Ltd. -1100m (3rd Expansion)	Hazira (Gujarat)	25	2621	Construction permission granted by the Board in its meeting held on 03.09.2015.
10.	Captive Jetty by M/s Ultra Tech Cement Ltd-Expansion of Captive jetty at Kovaya	Kovaya Pipavav (Gujarat)	5	200	Construction of the jetty is completed and will be operational after getting customs clearance.
11	Captive Jetty by M/s Godrej – Ro Ro jetty for handling of ODC cargo at Dahej SEZ	Dahej	1	5.9	Construction permission granted by the Board in its meeting held on September 2015.
12	Captive Jetty by M/s ISGEC – Ro Ro jetty for handling of ODC cargo at Dahej SEZ	Dahej	1	55	Construction permission granted by the Board in its meeting held on September 2015.
13	Demolition and reconstruction of Capt of Ports Jetty at panaji.	Panaji-Port Goa	*.	15.01	Almost in completion stage. * The jetty will cater to low craft passenger vessel and other small crafts. No cargo will be discharged/ loaded at this jetty.

14.	Demolition of old existing jetty and reconstruction of new Capt. Of Ports jetty at Old Goa.	Panaji-Port Goa	*.	20.36	75% work of construction is completed. * The jetty will cater to low craft passenger vessel and other small crafts. No cargo will be discharged/ loaded at this jetty.
15.	Establishing a captive port at Parangipettai by M/s IL &FS Limited	Parangipettai Tamil Nadu	13 MMTPA	1349	Construction yet to be commenced.
16.	Meghwaram Port	Meghwaram Andhra Pradesh	Captive Port 4.70 MMT	600	Investigation studies in progress
17.	KSEZ	KSEZ Andhra Pradesh	Captive Port 15.00 MMT	2500	Land acquisition completed. Works are yet to be taken up.
18	Phase-2-Development of Krishnapatnam Port	Krishnapatnam Andhra Pradesh	44.30(Bulk & Gen Cargo) 3.30 MTEU (Containe)	6600	Under construction
19	7th Berth	Kakinada Deep Water Port, Aandhra Pradesh	2.5	90	Under Progress
20	Dhamra Chandbali Port Project	Dhamra Port,Orissa	25 MMT	3639	2 Berths Completed
22.	Development of Karaikal Port through private investment on BOT basis	Karaikal, Puducherry	Phase – 2A 21.5 Phase 2AE 6.5	1600 500	Phase -2A and 2AE Works are in progress.
23.	Development of Pondicherry Port through private investment on BOT basis	Pondicherry	Phase – 1 16.2 Phase - II 10.8	2785 N.A	Developer has gone for Arbitration and the same is in progress.

24.	Construction of Captive Jetty at Manki in Honnavar Taluk of U.K District by M/s. Shree Renuka Energy Ltd.,Belgaum	Manki Karnataka	2.0(3.5 in Future)	46	DPR Under Preparation GoK has leased 75000 Sq.M land on 30 years lease Period Statutory Clearances are yet to be obtained Manki Port limits declared.
25.	Anchorage operations at Honnavar Port by M/s Honnavar Port Pvt Ltd., Hyderabad	Honnavar, Karnataka	4.99	511.3	Gok has leased 137560 Sq.m of Port land on lease for 10/30 years Period. Some Statutory Clearances are yet to be obtained Port limits declared.

Source: Maritime States/Maritime Boards .

Appendix – IV

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

Sl. No	Project	State/ Ports Maritime Board	Capacity (Million Tonnes)	Project Cost (Rs. In Crore)	Project Status
1	2	3	4	5	6
1.	GCPTL Proposed 2nd liquid jetty & allied infrastructure.	Dahej (Gujarat)	2.5-3.5 (estimated)	2500 (estimated)	Techno- Commercial Feasibility study is under progress.
2.	Sterling Port Limited	Dahej (Gujarat)	41 (Phase -I)	2501.8	Under Construction.
3.	Petronet LNG Ltd. 2nd jetty	Dahej (Gujarat)	2.5	612	Construction completed & operational.
4.	Development of Chhara Port	Chhara (Gujarat)	8	1200	CA signed on 29.1.2015 Environment Clearance received. Financial closure is under process.
5.	Development of Modhawa port.	Modhawa (Gujarat)	Developer Under selection at GoG Level		
6.	Development of Greenfield port by M/s. IL & FS	Khambhat (Gujarat)	Kept on hold due to Kalpsar Project.		
7.	Development of Greenfield port by Ms. JK Cement Group	Dholera (Gujarat)	Kept on hold due to Kalpsar Project.		
8.	Development of Nargol Port	Valsad (Gujarat)	20	4300 (Estimated)	DPR has been submitted which is under scrutiny. Environment Clearance is to be obtained by the Company.
9	LNG Terminal by Swan Energy Ltd.	Jafrabad, Pipavav, Gujarat	5	4000	DPR approved. Environment Clearance received. Financial Closure & Concession Agreement is under discussion.
10	Captive jetty expansion by M/s. Sanghi CEMENT Ltd.	Jakhau, Gujarat	2	150	Environmental clearance awaited
11	Captive jetty by M/s Archan	Jakhau, Gujarat	2	135	In principle approval has been granted by

Sl. No	Project	State/ Ports Maritime Board	Capacity (Million Tonnes)	Project Cost (Rs. In Crore)	Project Status
1	2	3	4	5	6
	Chemical Budh Bunder				GoG. Studies & investigations for DPR are under progress.
12.	Multi-purpose jetty at Sikka by Reliance Industries Ltd.	Sikka, (Gujarat)	15	1000	Studies are under progress.
13.	Captive jetty by M/s Universal Success Enterprise Ltd	(Bhogat) Gujarat)	5	12.6	Environmental clearance awaited.
14.	M/s Sealand Port Pvt. Ltd (a group company of IL&FS) Coal Jetty & Multypourpose Jetty	Nana Layja, Kutch, Gujarat	17	1000	In principle approval is granted by GoG (December 2014)l
15.	M/s Sealand Port Pvt. Ltd (a group company of IL&FS) Multypourpose Jetty under Gujarat SEZ Act.	Nana Layja, Kutch, Gujarat	3	256	In principle approval is granted by GoG (September 2015)
16	Captive jetty by M/s Reliance Ports Terminal Ltd. – 6 th oil tanker berth at Sikka –A2	Sikka, Gujarat	7	180	In principle approval is granted by Board of GMB (June 2015)
17.	SPM no. 2 at Hazira by Reliance Industry Ltd.	Hazira,Gujarat	4	100	Studies are under progress.
18	Redi Port Ltd	Redi Port Maharashtra	33.38 MTPA & 1.74 m/EU	3634	Awaiting Environmental Clearance from MOEF
19	Vijaydurg Ports Pvt Ltd	Vijaydurg Port, Maharashtra	78	4000	TORs received from MOEF
20	Rewas Port Ltd	Redi Port Maharashtra	Phase1 - 66m.ton	Phase1 7000	
			Phase1! - 185 m.ton		Permission for Right of Way yet not received from MbPT
			Phase111 – over 400 m.ton		

Sl. No	Project	State/ Ports Maritime Board	Capacity (Million Tonnes)	Project Cost (Rs. In Crore)	Project Status
1	2	3	4	5	6
22.	Construction of Terminal building	Panji Port	*	Estimation under process	Project is in initial stage. *This is integral part of Capt. Of ports jettey at Panji
22	Captive port facility by M/s. Udangudi Power Corporation Ltd.	Udangudi Thoothukudi Tamil Nadu	6	9083	Port has been notified. Statutory clearances. Financial closure pending
23.	Captive port facility by M/s. Coastal Tamil Nadu Power Ltd.	Cheyyur Kancheepuram Tamil Nadu	13	16000	Notification of Port limits under process
24.	Captive port by M/s. Chettinad Power Corporation Ltd.	Tharangambadi Taluk Nagapattinam Tamil Nadu	3.5	7500	Port has been notified. Development under process.
25.	Captive port permitted to handled other commercial cargo by M/s. Nagarjuna Oil Corporation Ltd.	Thiruchopuram in Cuddalore Tamil Nadu	9.3	384 (Captive facility only)	Port has been notified. Development has temporarily been stopped dues to financial issues.
26.	Gangavaram Port Ltd	M/s Gangavaram Port Ltd Visakhapatnam	40.95 MMTPA	196.00* (2015-16)	Commercial Operations started during 2009 *project investment for the period December, 15 to March, 16 is Rs.192.73 crores. - No investment proposal for the year 2016-17
27.	Bhavanapadu Port	Bhavanapadu, Andhra Pradesh	6045MMT	3500.00	Bidding is in progress to develop the Port in PPP Mode.
28.	Container Operations in 6th Berth	Kakinada Deep Water Port, Andhra Pradesh		60	Work in Progress
29.	Nakkapalli Port	Nakkapalli Andhra Pradesh	Captive Port 4.00 MMT	479	Yet to be taken up

Sl. No	Project	State/ Ports Maritime Board	Capacity (Million Tonnes)	Project Cost (Rs. In Crore)	Project Status
1	2	3	4	5	6
30.	2nd stage Development of Karwar Port	Karwar Karnataka	5	150	Issue of bid documents is under progress.
31.	Development of Modern Sea Port at Tadri.	Tadri Karnataka	34.40	300	IDD Nominated KSIIDC as nodal agency. Preparation of DPR is under progress.
32.	Development of Deep Draft Green field Port at Haldipur Port	Haldipur Karnataka (Proposed)	18	190	DPR under progress by Mineral Enterprises Limited, Bangalore.
33.	Development of Honnavar Port	Honnavar Karnataka	2	20	M/s. Honnavar Port Ltd., has submitted DPR for the approval of the Government.
34.	Captive Port at Manki Port	Manki Karnataka	1	4.6	M/s. Renuka Sugar is in the process of preparing DPR for construction of captive jetty.
35.	Development of Port and setting up trade warehousing Zone at Belekeri.	Belekeri Karnataka	24	150	i-deck already prepared RFP, pre-feasibility report and Draft Concessional agreement.
36.	Development of captive jetty at Pavinkurva, Kunta	Pavinkurve Port(Newly declared port)	20	60	The proposal is under consideration.

Annex-I

Outlay And Expenditure - Port Sector (Central)

(Rs. In crore)

Port	Annual Plan (2007-2008)		Annual Plan (2008-2009)		Annual Plan (2009-2010)		Annual Plan (2010-11)		Annual Plan (2011-12)		Annual Plan (2012-13)		Annual Plan (2013-14)		Annual Plan (2014-15)		Annual Plan (2015-16)	
	App. Outlay	Actual Exp.	App. Outlay	Actual Exp.	App. Outlay	Actual Exp.	App. Outlay	Actual Exp.	App. Outlay	Actual Exp.	App. Outlay	Actual Exp.	App. Outlay	Actual Exp.	App. Outlay	Actual	App. Outlay	Actual Exp. Upto Sept.,15)
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	15	16	17	18
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	43.75	23.04	46.00	7.73
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	50.00	76.53	230.79	31.51
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	647.54	294.82	235.85	83.9&&
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	41.99	4.11	39.00	33.30
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	42.84	17.20	3.00	6.81
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	306.88	274.69	414.01	23.53
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	100.00	324.47	308.92	5.26
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	82.87	61.17	13.76	3.68
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	132.60	85.10	22.50	68.14
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	50.00	67.94	64.35	17.83
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	600.85	34.09	422.33	90.17
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	220.00	62.50	200.00	99.81
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*	0.50	2.94*	477.5	0.69*
WEB Based EDI Port Community System	7.50	0.04	6.00	1.00	3.00	3.33	4.88	4.46	2.38	2.01	2.00	2.00	1.00	##	0.50	0.00	3.85	0.00
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	464.80	38.01	704.38	48.57
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##	0.00	0.00	0.00	0.00
Total	2109.27	884.68	3650.97	1143.10	2416.00	1227.78	1861.26	1392.30	2194.72	1724.37	2574.93	1633.70	4654.30	674.27	2785.12	1366.62	3186.24	520.93

(a) Includes Haldia and RR Schemes.

(b) Includes DCI, ALHW, R&D Studies, Green port initiatives, Sagar Mala,Dev.of Non-Major Ports,IT for D/Shipping Coastal shipping Berths, Pollution cess, River Regulatory measures etc.

* The amount is received as equity from Govt. of India and other stakeholders. && -Rs.66.63 advance paid earlier now Transferred to revenue

App.Outlay: Approved Outlay

##- Not Available

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

Annex-II

Commodity-wise Traffic Handled at Major Ports

(000 Tonnes)

Port	Period	POL & its Products	Iron Ore	Thermal Coal	Coking Coal	Ferti.& FRM (Dry)	Food grain	Container	TEUs	Others	Total
1	2	3	4	5	6	7	8	9	10	11	12
Kolkata	2010-11	878	827	0	97	62	11	6220	377	4445	12540
	2011-12	682	450	0	8	69	0	6818	317	4206	12233
	2012-13	708	158	0	9	94	107	6960	463	3808	11844
	2013-14	717	179	211	262	39	27	7063	449	4377	12875
	2014-15	626	133	0	270	54	532	8109	528	5558	15282
April-	2014-15(P)	325	50	0	56	21	224	3987	258	2391	7054
September	2015-16(P)	277	6	0	211	28	154	4485	282	2900	8061
Haldia	2010-11	10606	5952	2173	6010	0	0	2835	149	7429	35005
	2011-12	6582	3943	2346	4939	519	3	2619	115	10064	31015
	2012-13	4796	1715	1976	4503	386	0	2869	137	11839	28084
	2013-14	4572	2170	1598	5350	559	0	2230	113	12032	28511
	2014-15	5500	2342	1185	5997	811	0	1957	102	13218	31010
April-	2014-15(P)	2942	722	575	2586	399	0	940	57	5898	14062
September	2015-16(P)	3651	858	803	3372	328	0	652	43	7535	17199
Paradip	2010-11	12845	13795	13280	6060	4362	0	69	4	5627	56038
	2011-12	15091	6556	16404	5159	4783	0	109	8	6152	54254
	2012-13	16467	1833	21403	4702	4146	0	171	13	7830	56552
	2013-14	17602	5593	24743	6872	4054	0	99	9	9040	68003
	2014-15	17976	2181	29932	7876	4429	0	67	4	8550	71011
April-	2014-15(P)	8944	1015	13644	4302	2239	0	26	2	4178	34348
September	2015-16(P)	9516	502	14489	4282	2032	0	66	3	5181	36068
Visakhapat	2010-11	19242	19347	3538	7926	4079	203	2572	146	11134	68041
	2011-12	17428	16243	3189	6874	4551	517	4213	234	14405	67420
	2012-13	13501	12569	2951	6795	2588	1121	4554	247	14959	59038
	2013-14	12960	13032	2744	6928	2614	817	4916	262	14493	58504
	2014-15	14640	8365	2779	6074	2558	280	4373	248	18935	58004
April-	2014-15(P)	7603	5468	1252	2640	1352	221	2380	134	9673	30589
September	2015-16(P)	8495	2349	1539	2695	1537	49	2299	134	8674	27637
Chennai	2010-11	13991	2114	1417	606	771	86	29421	1485	13054	61460
	2011-12	13290	97	610	351	643	190	30076	1555	10450	55707
	2012-13	13376	52	0	0	421	314	29708	1539	9533	53404
	2013-14	12877	0	0	0	415	306	28330	1468	9177	51105
	2014-15(P)	12737	146	0	0	541	37	29945	1552	9135	52541
April-	2014-15(P)	6328	94	0	0	224	28	15285	792	4760	26719
September	2015-16(P)	6272	0	0	0	176	0	15517	804	3846	25811
Ennore	2010-11	509	401	9265	103	0	0	0	0	731	11009
Kamarajar	2011-12	502	0	12646	465	0	0	0	0	1343	14956
	2012-13	521	0	14240	685	0	0	0	0	2439	17885
	2013-14	1275	0	22482	0	0	0	0	0	3580	27337
	2014-15	3188	0	24023	330	0	0	0	0	2710	30251
April-	2014-15(P)	1497	0	11738	141	0	0	0	0	1273	14649
September	2015-16(P)	1983	0	12619	0	0	0	1	0	1376	15979
Tuticorin	2010-11	741	64	5349	0	1901	80	8169	468	9423	25727
Chidambar	2011-12	630	33	6050	0	2025	307	9227	477	9833	28105
	2012-13	547	0	6689	0	1059	128	9372	476	10465	28260
	2013-14	299	0	6644	0	1178	49	10129	508	10343	28642
	2014-15	607	46	8613	0	1491	60	11034	560	10563	32414
April-	2014-15(P)	337	0	4878	0	749	51	5444	278	4257	15716
September	2015-16(P)	356	86	5723	0	790	0	6122	310	5591	18668
Cochin	2010-11	12121	0	40	0	429	0	4419	310	864	17873
	2011-12	14084	0	34	0	430	0	4715	337	827	20090
	2012-13	14027	0	28	0	353	0	4607	335	830	19845
	2013-14	14289	0	0	0	307	0	4785	343	1505	20886
	2014-15	14017	0	0	98	446	0	5246	366	1788	21595
April-	2014-15(P)	7476	0	98	0	247	0	2713	187	821	11355
September	2015-16(P)	7168	0	0	0	184	68	2778	201	1133	11331
New	2010-11	21551	3744	0	2856	788	116	568	40	1927	31550
Mangalore	2011-12	22245	3036	0	4022	825	58	645	45	2110	32941
	2012-13	22538	2616	2553	4358	536	204	692	48	3539	37036
	2013-14	22944	3012	2928	5420	504	118	747	50	3692	39365
	2014-15	22973	1474	2726	5452	731	0	921	63	2289	36566
April-	2014-15(P)	10904	1144	1125	3190	340	7	493	34	1027	18230
September	2015-16(P)	11560	174	1508	1392	454	27	565	39	1247	16927

Contd/-

Commodity-wise Traffic Handled at Major Ports

(000 Tonnes)

Port	Period	POL & its Products	Iron Ore	Thermal Coal	Coking Coal	Ferti.& FRM (Dry)	Food grain	Container	TEUs	Others	Total
1	2	3	4	5	6	7	8	9	10	11	12
Mormugao	2010-11	939	40625	1633	4933	232	0	220	18	1478	50060
	2011-12	923	29370	1163	5669	93	0	279	22	1552	39049
	2012-13	823	7421	768	6606	78	60	258	20	1724	17738
	2013-14	527	44	0	7518	179	44	236	19	3191	11739
	2014-15	571	758	2000	6568	227	0	312	25	4275	14711
April-	2014-15(P)	283	228	607	2969	84	0	136	11	2033	6340
September	2015-16(P)	241	260	865	4024	130	0	144	12	2453	8117
J. L. Nehru	2010-11	5043	0	0	0	0	0	56426	4332	2848	64317
	2011-12	4845	0	0	0	4	19	58233	4317	2629	65730
	2012-13	4126	0	0	0	0	0	57911	4259	2451	64488
	2013-14	4107	0	0	0	0	0	55235	4162	2991	62333
	2014-15	4034	0	0	0	0	0	56933	4467	2834	63801
April-	2014-15(P)	1816	0	0	0	0	0	28971	2233	1518	32305
September	2015-16(P)	2214	0	0	0	0	0	28546	2234	1519	32279
Mumbai	2010-11	32990	0	6368	0	455	745	653	72	13375	54586
	2011-12	30611	0	4622	0	404	894	551	56	19104	56186
	2012-13	34751	0	4100	0	512	880	829	58	16966	58038
	2013-14	35980	0	4221	0	302	703	449	41	17529	59184
	2014-15	36285	0	4304	0	448	0	544	45	20079	61660
April-	2014-15(P)	17813	0	2037	0	261	0	291	24	9429	29831
September	2015-16(P)	18157	0	2171	0	167	108	243	21	10271	31117
Kandla	2010-11	48426	817	3082	410	6390	674	2586	160	19495	81880
	2011-12	46938	991	4064	161	6058	1291	2791	168	20207	82501
	2012-13	54544	925	4064	374	4624	3783	1935	118	23370	93619
	2013-14	52906	586	6080	270	3633	2732	453	29	20345	87005
	2014-15	55589	1160	9725	242	4488	2223	0	0	19056	92483
April-	2014-15(P)	27738	456	4545	132	2040	1925	0	0	9703	46539
September	2015-16(P)	27284	536	7539	43	3112	426	14	1	11429	50383
All Ports	2010-11	179882	87686	46145	29001	19469	1915	114158	7561	91830	570086
	2011-12	173851	60719	51128	27648	20404	3279	120276	7651	102882	560187
	2012-13	180725	27289	58772	28032	14797	6597	119866	7714	109753	545831
	2013-14	181055	24616	71651	32620	13784	4796	114672	7453	112295	555489
	2014-15	188743	16605	85287	32907	16224	3132	119441	7960	118990	581329
April-	**2014-15(P)**	**94006**	**9177**	**40499**	**16016**	**7956**	**2456**	**60666**	**4010**	**56961**	**287737**
September	**2015-16(P)**	**97174**	**4771**	**47256**	**16019**	**8938**	**832**	**61432**	**4084**	**63155**	**299577**

P : Provisional Source: Major Ports and Indian Port Association.

Annex-III

Commodity Composition of Traffic Handled at Non- Major Ports.

(000 Tons)

Maritime Status / UTs	Period	POL	Iron Ore	Building Material	Coal	Fertiliser & FRM	Container	Others	Total
1	2	3	4	5	6	7	8	9	10
	2010-11	140874	7156	8798	29731	6085	19866	18397	230907
	2011-12	151487	6919	9022	38372	7185	25069	20996	259050
Gujarat	2012-13	165137	7636	8408	54337	6418	24618	21263	287817
	2013-14	165578	5169	10002	65759	5950	37043	20444	309945
	2014-15	153839	5630	10109	81118	7940	43677	33780	336093
April - Sept	2014-15	81778	2979	6679	40651	3231	21489	8133	164940
	2015-16	87051	2605	5759	35066	4846	23408	7673	166408
	2010-11	0	5120	2277	4997	228	0	2253	14875
	2011-12	0	6362	2490	7589	230	0	3276	19947
Maharashtra	2012-13	397	7818	2042	10396	84	0	3461	24198
	2013-14	1123	7615	1998	9715	140	0	4073	24664
	2014-15	0	9614	2120	10955	0	0	4606	27295
April - Sept	2014-15	0	4045	999	5255	0	0	2333	12632
	2015-16	0	4247	929	5020	0	0	1962	12158
	2010-11	2786	8957	484	19618	5799	0	5623	43267
	2011-12	3508	2974	859	23512	7035	0	7745	45633
Andhra pradesh	2012-13	1762	977	1111	30854	5135	0	11972	51811
	2013-14	1707	1475	1550	35957	5455	0	12548	58692
	2014-15	1411	10014	1285	49518	5341	0	15875	83444
April - Sept	2014-15	674	2483	598	23300	1882	619	8590	38146
	2015-16	772	955	619	22949	2906	707	6939	35847
	2010-11	0	14581	0	0	0	0	0	14581
	2011-12	0	14305	0	165	0	0	0	14470
Goa	2012-13	0	3276	0	113	0	0	0	3389
	2013-14	0	0	0	284	0	0	0	284
	2014-15	0	347	1	412	0	0	0	760
April - Sept	2014-15	0	186	0	0	0	0	0	186
	2015-16	0	0	0	0	0	0	0	0
	2010-11	1503	0	7	0	58	0	43	1611
	2011-12	1114	0	7	0	46	0	43	1210
Tamil Nadu	2012-13	631	0	6	0	252	0	44	933
	2013-14	788	0	27	0	41	0	10	866
	2014-15	652	0	112	0	58	0	3	825
April - Sept	2014-15	383	0	10	0	26	0	59	478
	2015-16	285	0	4	0	23	0	102	414
	2010-11	31	2322	77	0	17	0	648	3095
	2011-12	0	0	19	0	29	0	544	592
Karnataka	2012-13	38	0	0	5	52		515	610
	2013-14	38	0	0	6	75		390	509
	2014-15	40	0	86	0	47		478	651
April - Sept	2014-15	68	0	21	0	17	0	172	278
	2015-16	85	0	22	0	20	0	212	339
	2010-11	184	130	684	4116	538	325	1045	7022
	2011-12	213	56	469	9402	1217	284	1202	12843
Others states /	2012-13	600	2148	386	13559	607	291	1574	19165
Uts #	2013-14	543	4079	601	14600	349	309	1529	22010
	2014-15	565	1465	722	16752	554	351	1718	22127
April - Sept	2014-15	332	1407	306	8108	159	196	973	11481
	2015-16	227	172	303	8498	234	168	1148	10751
	2010-11	145378	38266	12327	58462	12725	20191	28009	315358
	2011-12	156322	30616	12866	79040	15742	25353	33806	353745
All Non Major	2012-13	168565	21855	11953	109264	12548	24909	38829	387923
PORTS	2013-14	169777	18338	14178	126321	12010	37352	38994	416970
	2014-15	156507	27070	14435	158755	13940	44028	56460	471195
April - Sept	2014-15	83235	11100	8613	77314	5315	22304	20260	228141
	2015-16	88420	7979	7636	71533	8029	24283	18036	225917

: Includes Pondicherry, Orissa, Kerala, Andaman & Nicobar Islands and Lakshadweep Islands.
No traffic was handled at ports, Daman & Diu.

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 31.3.09	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
As on 31.3.14	4.50	17.00	43.00	25.65	3.00	17.67	2.30	24.01	49.17	1.50	32.00	66.60	5.50	291.90
As on 31.3.15	4.50	17.00	53.00	27.49	4.00	17.67	2.30	24.01	49.17	1.50	32.00	66.60	6.50	305.74
Iron Ore														
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
As on 31.3.14	-	6.00	4.50	12.50	6.00	8.00	-	-	7.50	27.50	-	-	-	72.00
As on 31.3.15	-	6.00	4.50	12.50	6.00	8.00	-	-	7.50	27.50	-	-	-	72.00
Coal														
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
As on 31.3.14	-	7.00	20.00	-	21.00	-	12.55	-	5.40	-	-	-	-	65.95
As on 31.3.15	-	7.00	21.00	-	24.00	-	12.55	-	5.40	4.61	-	-	-	74.56
Fertiliser														
As on 31.3.09	-	-	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
As on 31.3.14	-	-	7.50	1.00	-	-	-	0.80	-	-	-	2.00	-	11.30
As on 31.3.15	-	-	7.50	1.00	-	-	-	0.80	-	-	-	2.00	-	11.30
Break-Bulk Cargo														
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
As on 31.3.14	6.74	15.75	33.80	47.09	1.00	17.92	22.21	12.35	15.70	7.65	11.53	26.52 *	0.90	219.16
As on 31.3.15	6.74	15.75	33.80	53.09	3.00	17.92	24.70	12.35	15.70	10.15	11.53	45.63	0.90	251.26
Container														
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
As on 31.3.14	5.90	4.00	-	2.68	-	42.45	5.00	12.50	-	-	1.00	7.20	59.48 @	140.21
As on 31.3.15	9.86	4.00	-	2.68	-	42.45	5.00	12.50	-	-	1.00	7.20	71.97@	156.66
TOTAL		`												
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	44.70	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	40.96	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
As on 31.3.14	17.14	49.75	108.80	88.92	31.00	86.04	42.06	49.66	77.77	36.65	44.53	102.32	65.88	800.52
As on 31.3.15	21.10	49.75	119.80	96.76	37.00	86.04	44.55	49.66	77.77	43.76	44.53	121.43	79.37	871.52

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

@ : Capacity of JNP Container Termnal (3berths), NSICT (2berths), GTIPL (3berths) and shallow water berth (1 no) has been taken as 21.57 MT, 17.40 MT, 31.80 MT and 1.20 MT respectively. Capacity of one shallow water berth at JNPT is 0.90 MT for dry bulk cargo.

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

Only BPS berth of Mumbai Port is considered as dedicated container berth. Assessed capacity of BPS (Dedicated) container berth of Mumbai Port is 1.0MT. Berth No.6, 7/8 ID are used as holding berths of MbPT crafts and no capacity has been accounted

* After accounting the capacity due to productivity, addition of berth No. 13 & 15,MHC, Floating cranes

Source : Development Wing - Department of Shipping.

Annex-V

Capacity Utilisation at Indian Ports during 2014-15

S.No.	States	Major Ports				Maritime States*			Total (Major + Non Major)		
		Name	Capacity (Million Tonnes) As on 31.3.2015	Traffic handled (2014-15) Million Tonnes	Capacity utilisation(%)	Capacity (Million Tonnes) As on 31.3.2015	Traffic handled (2014-15) Million Tonnes	Capacity utilisation (%)	Capacity (Million Tonnes) As on 31.3.2015	Traffic handled (2014-15) Million Tonnes	Capacity utilisation(%)
1	Gujarat	Kandla	121.43	92.48	76.16	422.00	336.09	79.64	543.43	428.57	78.86
2	Maharashtra&	Mumbai	44.53	61.66	138.47	25.50	27.30	107.04	149.40	152.76	102.25
		JNPT	79.37	63.80	80.38						
3	Goa	Mormugao	43.76	14.71	33.62	14.30	0.76	5.31	58.06	15.47	26.65
4	Tamil Nadu	Kamaraajar(Ennore)	37.00	30.25	81.76	9.83	0.83	8.39	177.42	116.03	65.40
		Chennai	86.04	52.54	61.07						
		V.O. Chidambaranar	44.55	32.41	72.76						
5	Karnataka	New Mangalore	77.77	36.57	47.02	15.80	0.65	4.12	93.57	37.22	39.77
6	Kerala	Cochin	49.66	21.60	43.49	1.10	0.09	8.18	50.76	21.69	42.72
7	Puducherry	-				14.76	4.96	33.60	14.76	4.96	33.60
8	Andhra Pradesh	Visakhapatnam	96.76	58.00	59.95	121.30	83.44	68.79	218.06	141.45	64.87
9	Orissa	Paradip	119.80	71.01	59.27	30.00	15.45	51.50	149.80	86.46	57.72
10	West Bengal	Kolkata Dock System	21.10	15.28	72.43	-	0.00		70.85	46.29	65.34
		Haldia Dock Complex	49.75	31.01	62.33						
11	A&N Islands		-			4.12	1.51	36.65	4.12	1.51	36.65
12	Lakshadweep						0.12			0.12	
	Total		**871.52**	**581.33**	**66.70**	**658.71**	**471.20**	**71.53**	**1530.23**	**1052.52**	**68.78**

Source: IPA, (*) Provisional, &-Capacity of Non-Major (Maharashtra) is as on 31.3.2014