

Freight Market in India 2017 Share, Trend, Segmentation And Forecast To 2022

Indian Freight -Market Demand, Growth, Opportunities and Analysis Of Top Key Player Forecast To 2022

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Description

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Current Scenario

- The current modal mix for cargo transportation is sub-optimal and skewed towards roads, which accounts for about 60-65% of the total freight transported.
- India has the second largest road network covering about 5.47 million km, of which national highways account for 2% of the network and carry around 40% of the traffic on Indian roads.
- The Indian Railways’ network comprises a total track length of about 119,578 km, with around 40% rail sections operating at 100% line capacity utilisation. Growth in freight traffic has almost plateaued at 0-1%, with the rail modal share declining to 30%.
- Indian ports have a freight handling capacity of over 1,700 million tonnes. Of the total freight handled at ports, major ports account for a 57.19% share, while non-major ports account for a 42.8% share.
- Air freight contributes a mere ~1% in the total cargo movement in India, moving around 35% of the total shipment value.
- Coastal and inland waterways lack dedicated infrastructure and thus remain largely untapped for movement of freight.
- The industry structure overall is highly fragmented, with unorganised players accounting for the largest share of business

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Emerging Trends – Growing capacity and rising scale of business

- A shift from pure transportation business to end-to-end service providers has emerged, thereby facilitating growth of third-party logistics and supply chain management industries in India.
- The rising scale of freight transportation has further encouraged a trend towards outsourcing non-core activities like logistics, warehousing, and associated activities to integrated players which has increased the share of the organised segment.
- The freight segment across all sectors has witnessed significant capacity augmentation and adoption of advanced technologies.
- Demand for logistics has been rising in Tier II and III cities, which has led to several third-party logistics and e-commerce players to expanding logistic operations in these areas.
- Freight transport through roads and air have been witnessing an upward trend in pricing, while that of ports and rail have been witnessing a downward or constant trend

Opportunities Galore – New programmes to drive growth

- Six major projects in roads, ports, inland waterways and railways – Bharat Mala, Setu Bharatam, district connectivity, Sagarmala, port-rail connectivity, 106 national waterways development – have been announced by the government, which will directly benefit the freight industry in future.
- Hyderabad-based Air Excellence Aviation Private Limited plans to establish 100 business development areas with small airports, and 100 air logistics centres with airstrips for cargo handling in the country.
- The shipping ministry has identified ~200 focus projects to be implemented by 2025 under the Sagarmala programme.
- Based on master plans finalised for 12 major ports, 142 port capacity expansion projects worth Rs 914.34 billion have been identified for implementation over the next 20 years.
- Further, 14 coastal economic zones covering all the maritime states and union territories have been proposed.
- The Ministry of Railways has also identified additional dedicated freight corridors – North-South Corridor (Delhi-Chennai); East-West Corridor (Kolkata-Mumbai); and East Coast Corridor (Kharagpur-Vijayawada) – for implementation in the coming decade.

Outlook and The Way Forward

- The overall outlook of the freight industry in India is very bright. The industry is expected to grow at a CAGR of 15-20% between 2015-16 and 2019-20.
- However, to handle the growing traffic, significant investments need to be made for expanding, modernising and upgrading infrastructure, deploying advanced equipment and technology, and setting up of new storage and transit facilities.
- Regarding GST, grey areas around increased compliance costs and credit blockages of the small players still exist.
- Air freight in India needs to be revived through a comprehensive air cargo programme/plan.
- Dedicated efforts will be required by government authorities/agencies to reduce turnaround time at ports and terminals.
- Further, a coordinated approach towards capacity addition will be needed with regards to ports, as some regions have significant overcapacity, while others have low capacity.

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