

CARGO TALK

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Being more productive at the same cost

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Distribution Redefined

Warehousing parks draw USD

As per a recent ICRA report, foreign investors are eyeing the growth opportunities in industrial warehousing hubs in the country. Over the last two years, the report states, the total amount of equity commitment through investment platforms has been US\$2.5 billion, in both in-house developments as well as acquired properties.



CT Bureau

The industrial warehousing segment has witnessed rapid growth in recent years due to healthy demand from occupants in sectors such as automotive manufacturing, third party logistics services, and e-commerce. In addition, regulatory interventions such as implementation of the GST and infrastructure status being accorded to the sector are also driving demand for large, integrated warehousing parks. As per an ICRA note, this has attracted foreign investors who are entering the sector with the mandate of investing in industrial warehousing parks across major cities of India. Often, this is done by partnering with a local developer or in some cases a global warehousing operator. The total amount of equity commitments to such platforms has been at least US\$2.5 billion over the last two years. Such investment commitments can support assets under management of more than 130 million sqft as per ICRA estimates. This is almost double the size of the current estimated stock of grade-A industrial warehousing in the country and around 10 times the operational portfolio of such platforms as on date.

Shubham Jain, Vice President and Group Head – Corporate Ratings, ICRA, says, “There is increasing demand for grade-A

warehousing space because of the operational conveniences and cost benefits. The demand is concentrated in metro cities, supported by the presence of manufacturing hubs in the vicinity, access to transport networks and Exim facilities, as well as the rising urban population in the metropolitan areas for consumption-driven demand for warehousing. The current incremental capacity addition is mainly through larger-sized

Pincus (in Embassy Industrial Parks), Ascendas-Singbridge (in partnership with Firstspace Realty), and Ivanhoe Cambridge and QuadReal Property (in LOGOS India). The existing and potential assets are primarily located in the cities of Mumbai, Delhi-NCR, Chennai, Kolkata, Pune, Bengaluru, Hyderabad, and Ahmedabad.

Such investment platforms, which have good financial backing, have

Foreign investments through local partnerships		
Foreign operator / fund	Partner / Manager	Fund / platform equity commitment (US\$ mn)
CPPIB	IndoSpace Core	500
Multiple	IndoSpace Fund III	580
Invanhoe Cambridge / QuadReal	LOGOS India Fund	410
Ascendas-Singbridge	Firstspace Realty	300
Warburg Pincus	Embassy Group	250
ESR / Allianz	ESR	450

warehousing parks, backed by capital from foreign institutional investors and collaboration on best practices with global warehousing operators.”

Some of the major investors in this space include the Canadian Pension Plan Investment Board (in IndoSpace Core), GLP (in IndoSpace Core), Allianz (in ESR India), Warburg

shown their intention of growing through a mix of in-house development as well as acquisition of completed/under-construction properties. Owners of completed projects will be able to monetise their assets at good yields, whereas the investment funds may see potential for further improvement in valuations through their operational strengths and asset improvements.

Trivia

■ The major investors in this space include the Canadian Pension Plan Investment Board, GLP, Allianz, Warburg Pincus, Ascendas-Singbridge (in partnership with Firstspace Realty), and Ivanhoe Cambridge and QuadReal Property.

2.5bn in foreign investments

From a credit perspective, industrial warehousing operations benefit from a stable revenue profile arising from long-term lease agreements, longer maturity loans available during construction as well as operational phase, and relatively low vacancy levels currently seen in key warehousing clusters and hubs.

Moreover, the moderate leveraging policy adopted by many of the investment platforms is credit positive. "However, some of the key aspects on which the credit assessment varies from the office leasing

New projects and their construction status

Seller	Purchaser	Location	Area (msf)	Construction status
Casa Grande Distriparks	LOGOS India	Chennai	2.2	Completed
Global Group	ESR	Pune	0.4 (70% stake)	Completed
Orris Infra	IndoSpace	NCR	1.7	NA
DRA Projects	Embassy Industrial Parks	Bengaluru	1.3	Under construction
KSH Infra	Morgan Stanley	Pune	1.1 (majority stake)	Completed
NA	Ascendas Firstspace	Chennai	5.6	Under construction
Crystal Indus and Logistics Park	IndoSpace	Ahmedabad	2.2	Under construction

segment is the relatively limited track record of operations and occupancy for many of the assets, vulnerability of vacancy and rent rates to rapid expansion in supply in relation to

existing stock, and relatively higher counterparty credit risk with manufacturing companies dominating the tenant list for many warehousing parks," comments Jain. ↴

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JNPT launches new Container Terminal Data Centre

■ JNPT has inaugurated its new Container Terminal Data Centre equipped with state-of-the-art technical infrastructure. The Centre houses a new server room equipped with smart-racks with in-row cooling system for critical ICT equipment. The Data Centre also provides real-time monitoring of critical parameters remotely, through Data Centre Infrastructure Management (DCIM) software.

Sanjay Sethi, Chairman, JNPT, says, "It is imperative for ports to integrate new technology trends and automation into their processes

to stay relevant and connected in this digitalised global business environment. The backbone, however, of these automated services is a robust and efficient data system network providing real-time data support and enhancing operational efficiency.

Our new Container Terminal Data Centre will also play the same role in port modernisation and digitalisation of services, which will not only benefit the Exim community but also drive our next phase of transformation."

Adani Ports to set up container terminal in Myanmar

■ Adani Ports and Special Economic Zone (APSEZ) will set up its first container terminal outside India in Myanmar, at an estimated cost of \$290 million (over ₹2000 crore). The company has signed an agreement to develop and operate a container terminal at Yangon Port in Myanmar. It will have a capacity to handle 0.80 million TEUs (20-foot equivalent units) of containers.

The estimated cost for implementing phase-I of 0.5 million TEUs is between \$220-230 million, and the phase-II expansion to 0.8 million TEUs is expected to cost between \$55-60 million. The investment is in line with APSEZ's strategy to have a footprint in Southeast Asia and expand the container terminal network. Construction for phase-I of the project will be completed by June 2021. The terminal will be integrated with APSEZ ports/terminals along the eastern and southern coasts of India, unlocking synergies by offering multiple entry and exit points for shipping lines.

adani



FreightBro's new App aims to optimise processes

■ FreightBro has launched a new application designed to optimise the freight forwarding process, save time, and increase efficiency. The App will help users discover global rates and schedules instantly, create instant quotes, monitor activity, accept bookings online, manage shipment lifecycle, and track cargo at a single touch of the screen. The App delivers an unmatched experience to customers and forwarders, and can be downloaded via the App Store or Google Play.

With this launch, FreightBro aims to simplify the complexities of the logistics industry by using technology to empower freight forwarders with a digital platform that can potentially increase their sales by 30 per cent while reducing their quotation turnaround time by 70 per cent and cost by 50 per cent. The company has successfully partnered with major shipping lines and logistics providers in India and China, and has been growing expeditiously since inception. FreightBro enables freight forwarders to concentrate on their core competency and increase their customer base and sales, while they take care of all the back-end functions for them.



LogYcode to make airfreight purchases simpler

■ Newly-launched e-commerce start-up LogYcode is set to make the cost-effective match between exporters and importers on the one hand and air freight carriers on the other. The idea behind the initiative is to create an e-marketplace where customers can shop and ship easily and grow their business efficiently. The platform plans to change the traditional way the customer reaches out for his logistics needs. One of the key objectives is to create a platform that provides the airfreight purchasing industry with real-time instant rates

for its buyers. LogYcode enables price comparison between preferred carriers based on a customer's choice of input, and can further place a booking with the selected carrier. It also allows customers to submit airway bills online through the help of EDI, and track shipments end-to-end. In the aviation and airfreight arena, LogYcode has the benefit of the huge untapped market of international logistics.

Its team comprises personnel with experience and background of logistics,



freight forwarding, airlines, shipping lines, terminal handling, and IT. The start-up is driven by digitalisation in the airfreight industry being the need of the hour. Globally, airfreight is the fastest channel, however, the industry lags in terms of technological advancement and digitisation. The processes to transport an air cargo still involves paper-based transactions.

Agility India earns CEIV Pharma certification

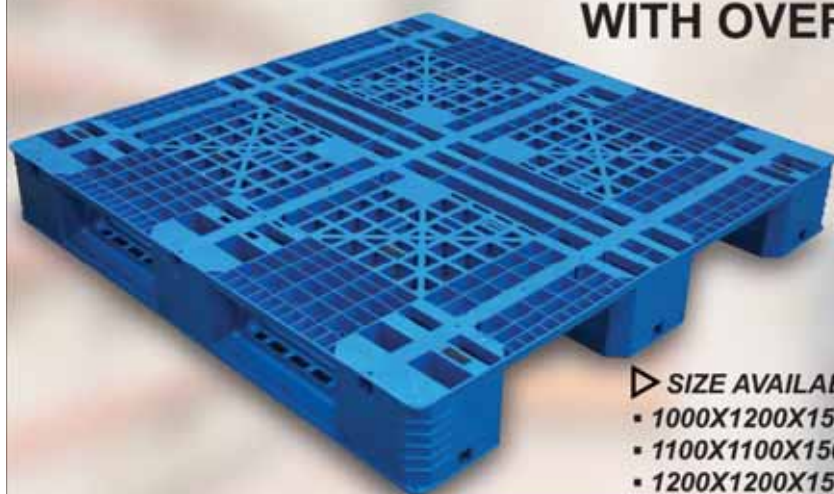
■ Agility has been awarded IATA's Centre of Excellence for Independent Validators (CEIV) certification for pharmaceutical logistics for its Mumbai operations. In India, Agility provides supply chain services, including management of temperature-controlled shipments, to some of the leading pharmaceutical brands.

Krishnakumar V, Chief Operating Officer, Agility India, says, "The CEIV Pharma certification demonstrates our ability to meet the most exacting standards in the industry. We continue investing in technology, infrastructure, personnel, and processes to ensure an unbroken cold chain for pharma shipments for our customers and their patients."



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Durable floors make better warehouses

Ritesh Jain, Chief Executive Officer, Lamba Techno Flooring Solutions, shares his view on the importance of warehouse flooring in handling loads and what needs to be done to ensure they remain durable.

Today's modern 3PL warehouses are not just storage godowns; they have transformed to smart storage spaces enclosing bigger areas to a tune of 10,000 to 50,000 sqm (also going vertically up), with 24x7 operations that include storage, packaging, and delivery to end-clients. This calls for proper designing of imposed loads and accounting for impact of sophisticated Material Handling Equipment (MHE) that operates on the floor. Resultantly, high-end flooring solutions become the need of the hour as against normal saw-cut floors such as the jointless ones.

Jointless floors are those constructed in large panels which

typically measure 25x25 sqm without intermediate or control shrinkage joints and fine tolerance surface finish - Free Movement (FM 2) - as per international standards TR-34 from the UK Concrete Society. These are constructed by us using cutting-edge technology of laying concrete floors with laser screeds. The word 'jointless' can be misleading, as there is a practical upper limit to the area of concrete that can be placed in a single continuous operation. No joints are sawn, but steel fibres in the concrete mix control the width and distribution of cracks caused by shrinkage.

A benefit of jointless floors to the building user is the opportunity

“High-end flooring solutions become the need of the hour as against normal saw-cut floors such as the jointless ones

” of having relatively large areas of floor with no joints. Normally, it is an SFRC with a higher dosage of steel fibres, say 30-45 kg/m³ depending upon the design, with higher thickness of slab which may be up to 225 mm.

Subsequently, to meet operational requirements, surface treatment is carried out on concrete floors by making use of liquid densifiers and polishing is also done. This increases the abrasion resistance of the wearing surface and prevents dust generation.

(The views expressed are solely of the author. The publication may or may not subscribe to the same.)



Ritesh Jain
Chief Executive Officer, Lamba Techno Flooring Solutions and Winner, India Cargo Awards (West & South), 2017

Lamba Techno Flooring Solutions was Gold Partner at India Cargo Awards (West & South), 2017



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CMA CGM starts a MOV'EMENT



The shipping and logistics major conducted the inaugural edition of MOV'INDIA, a unique initiative dedicated to help evolve the industry in India, by bringing together key shipping and logistics stakeholders to discuss the future of the industry.



On the agenda for French container shipping company CMA CGM is environmental protection, digital transformation, and Over Dimensional Cargo (ODC), identified as catalysts that will help bring about a change in the industry. The group

launched the first edition of its MOV'INDIA event on May 29, 2019, demonstrating its vision for the future of shipping.

MOV'INDIA 2019 is a first-of-its-kind initiative by the CMA CGM Group in India, aiming to bring together the key stakeholders and influencers of the shipping and logistics industry on a single platform for discussions into the future of the industry. Speaking about it was **Ugo Vincent**, Managing Director, CMA CGM India, who said, "India is growing and we are all witnessing this growth. Through this conference, we

are joining forces with major stakeholders in the industry to have a constructive discussion and reflect on three key themes. The first one is digital disruption. The industry is changing and there are a lot of projects going on whether it is on the shipping side, road transport, or block chain. The second one, which is also very close to my heart, is protecting our environment and developing clean technology for clean shipping. We will have dedicated experts from the trade

to discuss how things are moving, not just on the CMA CGM side but also with a wider view at IMO 2020."

The third topic that was put under the microscope was looking beyond the box. Vincent added, "We know that CMA CGM is able to transport containers, but we are also listening to our customers. You can see big groups building factories, importing and exporting industrial projects, and those we can carry on a container ship. So, we are not only carrying containers, but also transformers and big machines."

CMA CGM, which is controlled by the Saadé family, recently bought a 25 per cent stake in Ceva Logistics.

Through this conference, we are joining forces with stakeholders to discuss the industry's future



Ugo Vincent
Managing Director
CMA CGM India

In the future

- CMA CGM will add container trackers to its fleet that will give shippers information on the location, external temperature, and shock intensity their cargo undergoes while on its voyage. The data collected by these sensors will be accessible either through a web portal or an API, allowing shippers to pull this information into their own systems. The technology is made by Traxens, which CMA CGM invested in beginning 2012. Shippers will have to specifically request these containers.



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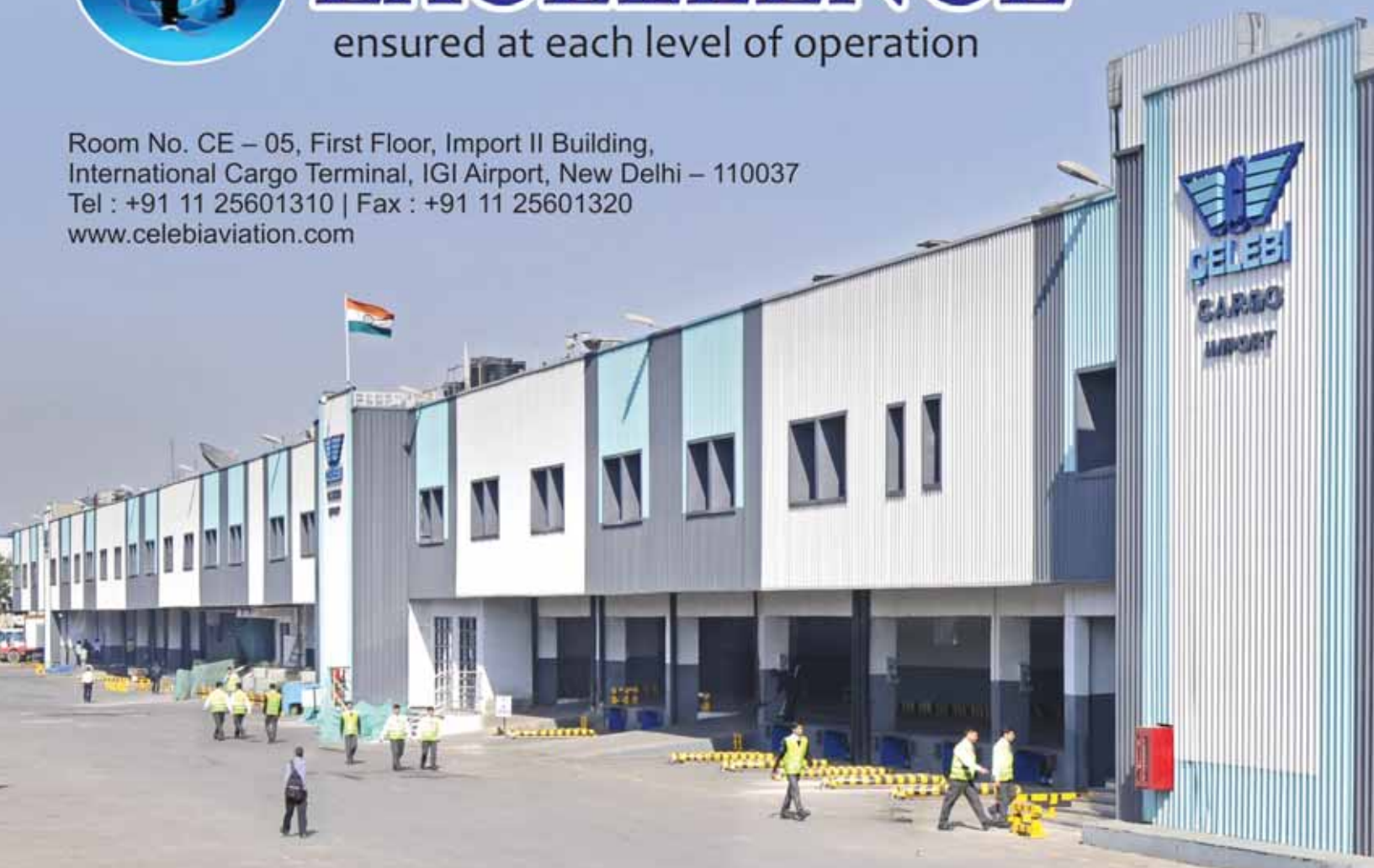


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Tripartite agreement aims to build container terminal at Colombo Port

■ The governments of Japan, India, and Sri Lanka have agreed to develop a container terminal at Colombo Port, which has attracted major investment from China under its Belt and Road initiative. The three nations will sign a Memorandum of Understanding in the coming months for the east container terminal, located at the newly expanded southern part of the Port of Colombo, to deepen it and develop a facility to allow large container ships to enter. The nine-year-old Hambantota port in southern Sri Lanka, with almost no container traffic and trampled fences that elephants traverse with ease, has become a prime example of what can go wrong for countries involved in Belt and Road.

Sri Lanka has been one of the countries drawn to China's Belt and Road initiative, an ambitious plan announced in 2013 by President Xi Jinping to build an estimated \$1 trillion of infrastructure to support increased trade and economic ties, and further China's interests around the globe.

One project in the country includes Port City Colombo, being built by China Communications Construction. The plan envisions a financial district — pitched as a new hub between Singapore and Dubai — with a marina, a hospital, shopping malls, and 21,000 apartments and homes.

TIACA launches Cargo Service Quality, an online rating tool

■ The International Air Cargo Association (TIACA) has launched Cargo Service Quality (CSQ), a fully-automated, technology-driven tool designed for an independent assessment of the service quality delivery at each step of the air cargo supply chain. The online rating tool covers every aspect of air cargo processing. It assesses cargo services across 51 parameters ranging from environment to handling and storage.

The launch comes after the successful completion of the CSQ pilot scheme that took place last year, involving 179 freight forwarders and 18 cargo terminal operators around the world, including India's Indira Gandhi International Airport (Delhi) and AAICLAS Chennai Cargo Terminal, Brussels Airport in Belgium, Indonesia's PT Jasa Angkasa Semesta, Hong Kong's Asia Airfreight Terminal, and Singapore Airport Terminal Services (SATS) amongst others.



DHL Express and EHang ease delivery with drone service

■ DHL Express and EHang have entered into a strategic partnership to jointly launch a fully automated and intelligent smart drone delivery solution to tackle last-mile delivery challenges in the urban areas of China. "This is an exciting time for the logistics sector, with continued growth of the Chinese economy and cross-border trade, particularly in South China and the Greater Bay Area, which is home to an increasing number of SMEs and start-ups. This means there is a tremendous volume of logistics needs, which in turn creates new opportunities for implementing innovative solutions that can continuously drive growth with greater efficiency and sustainability, and less cost," said **Wu**

Dongming, CEO, DHL Express China. The new customised route, which has been exclusively created for a DHL customer, covers a distance of approximately eight kilometres between the customer's premises and the DHL service centre in Liaobu, Guangdong Province, using the advanced Unmanned Aerial Vehicle (UAV) in EHang's newly-launched Falcon series.



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Imperial Logistics unveils VW Group packaging centre

■ Imperial Logistics has formally opened the new Volkswagen Group packaging centre, which it is managing and operating at JadeWeserPort, Wilhelmshaven, Germany. The 40,000 sqm facility took nine months to complete and comprises four halls. The facility is set to receive close to 7,000 Audi, Volkswagen, and Volkswagen Commercial Vehicles parts from plants throughout Europe. These will then be stored, packed, and containerised for shipment. **Astrid Lühning**, Member – Management Board, Volkswagen Group Logistics, says, "With the integration of the packaging centre in Wilhelmshaven, we have optimised our supply network and reduced logistics costs for supply to our overseas plants. During the tender process, Imperial Logistics provided a convincing materials flow concept among other things."



Thomas Zernechel, Head – Volkswagen Group Logistics, adds "With the location of the packaging site, we have a direct link to a port through which our parts can be transported using the largest vessels in the world."



Maersk launches digital ocean customs clearance platform

■ Maersk's Customs Clearance online shipping management platform will initially launch in seven European countries, including Germany, France, Denmark, The Netherlands, Poland, United Kingdom and Spain, with the goal of expanding globally by the end of 2019. The platform is meant to be a one-stop shop for handling all export and import declarations to ensure that goods are entering and exiting ports legally, thereby reducing delays, potential customs issues, and the number of intermediaries involved. The new platform covers all types of cargo across all Maersk brands.

"This new one-stop shop allows us to timely and efficiently handle export and import declarations for our customers. The solution provides downstream benefits of full governance and compliance, and eliminates the need to provide a quote as pricing is displayed online, saving three to five minutes per quote," says **Vincent Clerc**, Chief Commercial Officer, AP Moller – Maersk.

PSA & SATS sign MoU to enhance sea-air connectivity in Singapore



■ To encourage closer cooperation between air and ocean modes, port operator PSA International and ground handler SATS have signed a Memorandum of Understanding (MoU) to provide cargo shippers and logistics service providers with better connectivity in the bustling hub of Singapore. The MoU was facilitated by the government agency Enterprise Singapore, to combine sea and air connectivity services in the Southeast Asian city-state. It lays special emphasis on improving supply chain efficiency, thus reducing transport costs of small and medium-sized enterprises.

PSA and SATS said they will collaborate on cross-industry initiatives, focusing on the multimodal transport of perishables, electronics, and

e-commerce goods via yard-to-port data linkages, network extensions, and enhanced track-and-trace capabilities. The partnership will also facilitate data transparency and ease of shipments within different free-trade zones.

Trivia

■ PSA's flagship operations are in Singapore and Antwerp, and its portfolio includes a network of more than 50 coastal, rail, and inland terminals in 17 countries.

■ SATS provides gateway services, including airfreight ground handling, in more than 60 locations and 13 countries in Asia and the Middle East.

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WAREHOUSE

The new organised market

Warehousing is set to enter a new phase of growth with the entire e-commerce concept picking up pace. **CARGOTALK** delves into emerging trends, opportunities, and government policies that have helped the industry grow and challenges that need to be overcome to make full use of its tremendous potential.



Kalpana Lohumi

The warehousing industry, without a doubt, has transformed tremendously from a mere amenity-less storage space to the pillar of a thriving manufacturing and booming e-commerce industry in India. A warehouse is the fulcrum for procurement, manufacturing and distribution services, which collectively build robust economies. Introduction of Goods and Service Tax (GST), grant of infrastructure status to logistics (including warehousing), and the 'Make in India' campaign are changing the face of Indian warehousing. An ICRA report also states that the industrial warehousing segment has witnessed rapid growth in recent years due to healthy demand from occupants in sectors such as automotive manufacturing, third party logistics services, and e-commerce.

Commenting on emerging warehousing trends in the Indian market, **Praveen Dadala**, Managing Director, AWOT Global Logistics (India), says, "The warehousing business is

emerging out of the shadows. The new e-commerce-driven economy along with increasing FMCG and other manufacturing bases are creating a big quantitative and qualitative shift in the Indian industry. The main thrust is in its ever-growing thirst for more space, and search for branded players who are well-versed in conducting world-class 3PL logistics. The industry is maturing at a rapid pace and it wants continuous efficiency in handling supply chains. In India, this is evidently clear with the induction of more capital, bettering of infrastructure, and availability of a range of quality offerings from both international and domestic players."

Warehousing in India has travelled far, from glorified godowns to the modern, technically fitted floors with computerised specifications, shares **Vikas Yadav**, Director, Future Warehouse Solutions. He further adds, "The formerly concrete or low-grade steel godowns are now increasingly being replaced

by pre-engineered, factory-produced steel structures which are often assembled at location. These modern warehouses are insulated, ventilated, and climate-proof with round-the-clock surveillance and standard quality and safety procedures. In keeping with the demand, warehousing-related sectors such as real estate and construction have resultantly seen an upward trend in cost, hence warehouses are now looking at optimum utilisation of space per square foot along with options of more economical, yet sturdier structures."

Abhishek Bhardwaj, Chief Marketing Officer, Shristi Infra-



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structure Development Corporation, feels that warehouses have become a fundamental part of business infrastructure and one of the key enablers in the global supply chain. He says, "Over the years, the industry has come a long way and become an integral part of the manufacturing and e-commerce industry. Driven by the nature of the business and technology, warehousing is a fast-evolving sector today undergoing substantial changes from being just brick-and-mortar shelters for the purpose of storing goods to highly sophisticated and technologically

advanced stockrooms with sorting, packing, blending,

and processing facilities. Private players have sensed this opportunity and have ventured into the sector with a view to bridging the gap between cost and efficiency of operations."

According to **Aditya Virwani**, COO, Embassy Group, the Indian warehousing sector is in a positive place this year. "This industry has been seeing steady growth since 2017, when the sector acquired infrastructure status. Easing of government regulations and structured reforms like implementation of GST, setting up of a logistics department in the ministry of commerce, and other policy changes have motivated further confidence in this segment. Growing manufacturing activity, rising domestic consumption, increasing international trade, emergence of organised retail in the country, increasing private and foreign investments in infrastructure along with e-commerce boom will keep this robust development active for the next few years to come," he says.

Virwani also adds that apart from simply being conventional storing services, warehousing now provides many value-added services. "Warehousing and logistics players are increasingly partnering in adopting modern solutions to handle inventory management, usage of fleet management software, and RFID systems. A strategically placed and well-planned warehouse not only improves consumer services but also facilitates a competitive advantage through efficient supply chain economics. At this rate, the current warehousing space is said to double in three years, by 2022," he explains.

Sharing his perspective on both structural and operational reforms, **Ankur Minda**, General Manager (Land & Leasing), Allcargo Logistics, says that the warehousing sector in India is going through a transformation. "From a fragmented sector to an organised one, consolidation of warehouses from smaller ones to a few larger ones, introduction



Praveen Dadala
Managing Director, AWOT Global Logistics
(India) and Winner, India Cargo Awards, 2018

“The government's thrust on improving road infrastructure and aiding or setting up of multimodal logistics parks is a key growth driver”



Vikas Yadav
Director
Future Warehouse Solutions



With increase in investment by international players, the gap in funding will be addressed



Abhishek Bhardwaj
Chief Marketing Officer
Shristi Infrastructure Development Corporation



Driven by the nature of the business and technology, warehousing is a fast-evolving sector



of automation, transformation of warehouses from storage providers to value-added service providers, and increase in the number of institutional funds investing in this space are some of the emerging warehousing trends. Owing to all those developments, warehouse inventory turnover has increased, so has profitability. Automation has enhanced the quality of service and efficiency of warehouses in a big way," says Minda.

To this, Yadav adds that riding on structured reforms, technological advancements and higher efficiencies, the logistics and warehousing sector is estimated to grow at a 9.5 per cent CAGR and attract nearly \$10 billion investments over the next five years.



Compared to other real estate assets, warehousing assets can be built in a much shorter span of time, bringing down the risk involved in Greenfield investments.

ZEROING IN ON LOCATION

Commenting on the present demand for setting up a warehouse, Bhardwaj says, "With occupiers now moving out of their smaller warehouses and consolidating their activities in larger facilities, the demand for large warehousing spaces has increased big time.

More than half the modern warehousing capacity in India is concentrated in the top six cities - Ahmedabad, Bengaluru, Chennai, Mumbai, Delhi-NCR and Pune - with Hyderabad and Kolkata being the other major markets. However, Tier-II cities like Asansol and Siliguri in West Bengal have come up with advanced and organised facilities of warehousing."

On these lines, Dadala notes that there indeed has been a considerable percentage of growth in Tier-I locations like Mumbai, Delhi and Chennai, but what is even more heartening to see is that even Tier-II cities like Hyderabad, Pune, Kolkata, etc., are logging good growth figures due to the fact that GST is a unifying factor across states. These cities are located in strategic geo positions and enable quick storage and distribution to their end-customers.

According to Yadav, implementation of GST and the rapid growth of e-commerce have created a significant growth prospect in warehousing, necessitating the building of large-scale warehouses across various locations.

Adding to that, Minda says, "Apart from these eight key cities, a key trend emerging now is the growing demand for warehousing and logistics space from Tier-II cities like Coimbatore, Guwahati, Lucknow, Jaipur, and Ambala."

Providing another angle to the emergence of Tier-II and III cities as a major focus area for warehousing, **Vaibhav Rathi**, Executive Director, Satvik Logistics, says that though he agrees with the trend, these cities



are primarily driven by e-commerce demand alone. Other buyers have demand close to the metro cities.

"The current government's focus on boosting the infrastructure of the country has acted as a catalyst for investment in warehousing," says Yadav, adding that Tier-II and III cities would continue to provide a huge potential for the warehousing industry. Development of airports, shift of the manufacturing base to these cities, growth in demand for consumption and industrial use, and development of the road network are factors that provide huge potential for growth of warehousing."

He also shares that as compared to these eight Tier-I cities in India, there are as many as 3133 Tier-II and III cities with one-third of India's population residing there. This implies that e-tailers and the manufacturing sector cannot ignore the potential, resultantly leading to a higher demand of warehousing services.

FRIENDLY POLICIES

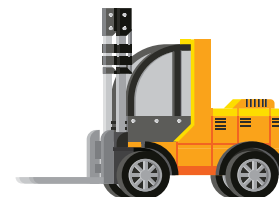
The warehousing sector is getting the desired attention from the government. Commenting on the role the government has played in boosting the sector, Virwani says, "The Indian

"A 100 per cent Foreign Direct Investment (FDI) in the storage

Praising the government initiative of granting infrastructure status to the logistics industry (including warehousing), Rath says, "This initiative has eased loans and borrowings from the banks."

Despite offering huge growth potential and undergoing drastic change, there are challenges that still remain in the warehousing industry. Listing the top two challenges and how the industry is trying to overcome them, but in vain, Virwani says, "Land laws in India are very complicated. Buying a big tract of land in this country is always a big challenge. The multiplicity of laws and government agencies make this process tedious and expensive. Another big challenge we foresee is solar roofing. State laws show disparity and do not encourage it, hence, despite our willingness to incorporate solar roofing and provide green energy to our clients, we are unable to do so."

Rathi also foresees an oversupply of warehousing facilities in the next five



■ The year 2018 witnessed a 22% y-o-y growth in total stock in grade-A and B warehousing space in top eight cities, while absorption saw a 60% y-o-y growth in these markets.

■ Delhi-NCR, Mumbai, Pune, Bengaluru, and Chennai emerged as the top five markets in terms of demand and absorption.



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Aditya Virwani
COO
Embassy Group

“

State laws do not encourage solar roofing, despite our willingness to incorporate it

”



Ankur Minda
General Manager (Land & Leasing)
Allcargo Logistics

“

Development of industrial corridors like Delhi-Mumbai and Delhi-Kolkata has created demand

”



Vaibhav Rathi
Executive Director
Satvik Logistics

“

The infrastructure status has eased loans and borrowings from banks

”

OPPORTUNITIES REMAIN

Yadav strongly believes that the industry is on the cusp of a turnaround and the current environment is likely to accelerate progress, considering the interest from government as well as private enterprises. He says, “The changing business and regulatory scenario has created a need for eliminating the excess flab in the logistics chain, thereby bringing in efficiencies at all levels. A boost to the warehousing industry has been provided by various factors which include steady growth in India’s economy, globalisation, economic reforms such as gradual rationalisation of tax systems, better connectivity, and improved communication infrastructure.”

Minda is of the opinion that organised retail, information technology, telecommunications, and healthcare generate a strong warehousing demand, and that free trade warehousing zones (FTWZs) and logistics parks attract investments.

Dadala also feels that as India moves forward as a strong economy, the warehousing industry is bound to see strong growth.

Yadav stresses, “The freight-only corridors and waterways will play a vital role in this industry as this will reduce the time in transportation and movement of goods can be faster, which will make it cheaper and more reliable to move goods between industrial heartlands in the North and ports on the eastern and western coasts. A lot of infrastructure investment is required to develop these dedicated corridors and waterways for boosting the warehousing industry.”

“Growth in consumption, organised retail, logistics outsourcing, regulatory interventions, private investments in logistics, and other infrastructure developments such as dedicated freight corridors will improve prospects of the organised professional warehousing segment.” concludes Virwani. ➔

years. According to him, the industry is heading towards a bubble.

Bhardwaj adds that the lack of integration in transport networks, information technology, and warehousing and distribution facilities are hurdles to growth. He feels that rules and regulations are different at different stages. “There is a dearth of trained manpower that is necessary for the third party logistics sector. Poorly managed facilities are the reason for heavy losses. We often see damage to and deterioration of stock, mainly in the perishables sector. Proper refrigerated cold storage, containers, and maintenance are a must,” he shares.

“India’s logistics industry has been adversely affected by the lower standardisation of cargo and containerisation of logistics traffic, hampering

the overall speed and thus increasing cost of storage and movement,” feels Yadav, adding that the need for large capital investment and issues related to land acquisition have also hampered the growth of the sector. “However, with expected increase in investment by international players, the gap in funding requirements is expected to be addressed in the future,” he adds optimistically.

Minda says, “Real-time analysis of data is a challenge, however, Big Data analytics can help by identifying patterns. Also, underdeveloped material handling infrastructure is a key issue, but this can be sorted by technology infusion. Since land acquisition in strategic locations and proper approvals are key challenges, single-window clearance will accelerate the process.”

Trivia

■ In line with the demand and requirements, built-to-suit developments constituted 26% of the total absorption last year.

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Strengthening the links in **COLD CHAIN**

Despite being an emerging and fast-growing business sector in India, the cold chain logistics industry still faces a huge amount of wastage of perishables. **CARGOTALK** digs deeper to understand how this pains the industry and what can be done to improve the present situation.





Kalpna Lohumi

The cold chain industry depends on thermal and refrigerated packaging methods to protect the integrity of products being shipped. It is a combination of surface storage and refrigerated transport, but despite being an emerging and fast-growing business sector in India, the inadequate cold chain infrastructure is hampering its growth. To further develop the cold chain industry, it is important to focus on these hurdles and invest in technology, manpower, and infrastructure solutions that are seamlessly integrated with initiatives by stakeholders.

THE SCENARIO TODAY

Commenting on the present status of cold chain logistics and its potential in India, **Ramesh Mamidala**, CEO, Çelebi Delhi Cargo Terminal Management India, says, "The Indian cold chain market is expected to grow at about 30 per cent y-o-y, while its current size is about \$15 billion. The cold chain industry is quite fragmented, with about 3500 companies in the value chain and organised players accounting for only about 10 per cent of the market. The industry is still evolving and there lies huge potential for organised players to modernise the infrastructure,

improve IT systems and processes, and reduce operation costs with the help of technology."

Anand Sen, Business Head - Temperature Controlled Logistics, Future Supply Chain Solutions, explains, "The demand for cold chain logistics services in India is primarily driven by bulk agricultural commodities (predominantly potato storage); consumer segments such as frozen food, dairy, confectionery, high-value fruits and vegetables; and pharmaceuticals. Estimated at ` 25,000 crore in 2017, the cold chain industry is expected to grow at a rate of 13-15 per cent in the next five



Trivia

- The Indian cold chain market is expected to grow at about 30 per cent y-o-y, while its current size is about \$15 billion.
- There has been an addition of 4.5-5 million tonnes of cold chain capacity in India.



Ramesh Mamidala
CEO, Çelebi Delhi Cargo Terminal Management
India and DDP Game Changer (ICA, 2016)



The industry has about 3500 companies in the value chain and organised players account for only 10%



Anand Sen
Business Head - Temperature Controlled
Logistics, Future Supply Chain Solutions



Export of meat, seafood, and bio-pharma products is expected to buoy up growth in the cold chain industry



Amitabh Singh
MD & CEO
Innovative Logistics



About `90,000 cr worth of agricultural produce and `50,000 cr worth of other perishable products are lost because of wastage



Sunil Kohli
Managing Director
Rahat Cargo



Retail chains and online grocers have received federal approval to set up cold chains that will bring in good investment



years, thus taking it to `50,000 crore by 2022." He says that three key segments - export of meat, seafood and bio-pharma products - is expected to buoy up growth in the cold chain industry. "There has always been a shortage of cold chain capacity, but with a sustained interest and increase in demand from new sectors such as fruits and vegetables, meat, seafood and bio-pharmaceuticals (which are mainly export-oriented), there has been an addition of 4.5-5 million tonnes of cold chain capacity in India. Stringent US FDA norms, for example, have necessitated critical monitoring of temperature and hence a preference for organised players rather than the unorganised ones," he adds.

According to Sen, there has been an increased focus by the government on developing farm-to-fork cold chain infrastructure as seen in the recently-announced SAMPADA scheme. "Setting up pack-houses is thus being seen as an emerging business opportunity with multi-product cold stores as collection centres, within 50-100 kms from farm gates and increased investment in refrigerated vehicles for pan India distribution," he states.

Sharing his point of view on the potential of the sector, **Amitabh Singh**, MD & CEO of Innovative Logistics (A Stellar Group Company), explains, "India is a country that produces more than 400 million MT of perishable products

every year, which includes horticulture, dairy, meat, poultry, and seafood. It is a country with the highest refrigerated storage space in the world - a capacity to store 30 million MT - behind only China and the USA. About 90 per cent of the storage is used for potatoes alone. Hence, it is estimated that the country needs an additional capacity of 31 million MT storage space."

He adds that in cold chain transportation, about 104 million MT of perishable goods is transported every year out of which only five million MT is through temperature-controlled vehicles. "The wastage in perishable products is staggering. It is estimated that about

Out of approximately 105 million tonnes of perishable shipments that move between cities, only about five million tonnes move within reefer trucks.



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₹ 90,000 crore worth of agricultural produce and ₹ 50,000 crore worth of other perishable products are lost because of wastage," Singh informs.

Describing the nature of the market, **Sunil Kohli**, Managing Director, Rahat Cargo, says, "The Indian cold chain market is by and large unorganised and dominated by traditional cold storage facilities in various cities, though cold storages with state-of-the-art provisions have been in place at major airports in the country. The industry has a compelling future, albeit with challenges. The market can be facilitated by favourable government initiatives and enhancement in technology to improve the quality of storage and transportation facilities. The transition from traditional cold storage facilities to fully-integrated cold chain projects would bring about efficiency and

increased productivity of cold chain companies. Furthermore, with growth in export of seafood, dairy products and other perishable items such as fruits and vegetables, major players will upgrade their facilities in order to store a broader variety of products under a wider temperature range."

Exemplifying his train of thought with numbers, **Sunil Nair**, CEO, Snowman Logistics, says, "According to the Economic Survey 2017-18, the Indian logistics sector provides a livelihood to over 22 million people which, in the next couple of years, is expected to grow significantly. Equipping the sector with the latest digital technologies and automation in operations would lead to a 10 per cent decrease in indirect logistics costs, placing India in good stead with countries like the US, China, and Japan when it comes to both

domestic as well as international trade. In the last few years, there has been a major demand in the processed food segment. However, even today, the cost for setting up a cold storage is very high. Consequently, only a few organisations are investing and are being patient in the hope of earning long-term returns." He also says that power, diesel, and labour are the major cost elements of cold chain and have been increasing more than the inflation rate year-on-year. This puts a lot of pressure on cold chain operators.

Cold storage is a major revenue generator of the Indian cold chain industry, feels **Harpreet Singh Malhotra**, Chairman & Managing Director, Tiger Logistics. He says, "The total value of the cold chain industry in India is expected to reach \$20 billion by 2020 through increased investments, moderni-

The biopharmaceuticals segment, which is heavily dependent on cold chain, is expected to grow by 18-20 per cent in terms of value, between 2017 and 2022.



sation of existing facilities, and establishment of new ventures via private and government partnerships. Currently, India has more than 6,300 cold storage facilities that are unevenly spread, with an installed capacity of 30.11 million MT used mostly for storing potatoes. The market, however, is gradually getting organised and multi-purpose cold storage facilities are on the rise. More than 50 per cent of the cold storage facilities in India are currently concentrated in Uttar Pradesh and West Bengal, while other states still face a challenge with investments from the government and private operators."

Limited infrastructure at the farm gate, a fragmented agriculture base, and lack of awareness of the benefits of cold chain access to expanded segments are some of the challenges plaguing cold chain development, according to

Pankaj Mehta, MD, Carrier Transcold, India & South Asia.

WHAT'S TRENDING?

Describing the evolution of the cold chain logistics sector over the years, Mehta says, "Over the next few years, increase in the organised retail sector, online grocery stores, quick service restaurant chains, as well as government initiatives will drive cold chain growth."

Echoing a similar view, Mamidala adds, "Some key strategic changes that have either taken place or are currently taking place include 100 per cent FDI, infrastructure status being provided, government funding and/or subsidy on development cost of up to 33.3 per cent, establishment of National Centre for Cold Chain Development (NCCD), and development of food parks."

"Major dairy companies, retail chains, and online grocers have received federal approval to set up 101 cold chains that will bring in an investment of ₹ 3100 crore in the sector," believes Kohli.

Sen lists the following key trends:

- Increased focus on maintaining the temperature integrity of products across the value chain.
- Premiumisation in end-user industries that has improved the willingness of companies to pay.
- Temperature-controlled supply chains becoming global on account of increasing food exports and entry of MNCs.
- Cold chain operators looking for new ways to improve efficiency of energy requirements of perishable products.

Nair says that IT tools have changed the spectrum of the cold chain industry by providing real-time synchronisation to deliver



Sunil Nair
CEO
Snowman Logistics

“
Equipping the sector with the latest technologies and automation would lead to a 10% decrease in indirect logistics costs
”

stable and hygienic supplies to the end-user in the least possible duration. "With the shift in focus from increasing productivity to providing better storage and transport facilities, the Indian cold chain industry has gained importance. The cold chain sector is receiving the best policy support from multiple agencies such as the MoFPI, NHB, APEDA, State governments, etc. Looking ahead, we can see a major shift from an unorganised to an organised market," he says.

Malhotra shares a similar sentiment. He says, "The private sector is being encouraged to develop the cold chain industry further by implementing the latest and most effective refrigeration technol-



Harpreet Singh Malhotra
Chairman & Managing Director
Tiger Logistics

“
More than 50% of cold storage facilities are currently concentrated in UP and Bengal; other states face a challenge with investments
”

Trivia

■ Currently, India has more than 6,300 cold storage facilities that are unevenly spread, with an installed capacity of 30.11 million MT used mostly for storing potatoes.



Pankaj Mehta
Managing Director
Carrier Transicold, India & South Asia

“A post-harvest management and agri-logistics system helps reduce food loss and aids in reaching distant markets”

According to a recent report by National Restaurant Association of India, the market for chain restaurants, including cafés and Quick Service Restaurants (QSR), is expected to grow at 20 per cent a year to reach ₹51,000 crore (or \$8 bn) by 2021.

ogy solutions available today. For private players, the high level of initial capital required to construct a cold chain unit continues to be the biggest challenge. However, if the government pitches in with a clear plan and promotes more PPP initiatives in this field, we could see a growth in momentum of the cold chain industry in India.”

Mehta adds, “Indian agriculture is one of the main drivers of the country’s economic growth. An efficient post-harvest management and agri-logistics system including aggregation, pre-conditioning, pre-cooling, and refrigerated transportation not only helps reduce food loss, but also aids in expanding the reach to distant markets.”

He believes that there is huge opportunity to reduce food loss and improve food distribution by implementing existing cold chain technology. “With a focus on the agri-logistics sector, we are working closely with several stakeholders to help plug the gaps by offering carrier cold chain solutions such as availability of reefer trucks in remote areas where cultivation/harvesting takes place. These infrastructure interventions have helped our customers achieve better returns on their investments and have benefitted farmers, traders, and transporters alike,” Mehta shares.

IS THE STRATEGY APPROPRIATE?

Despite having the potential, the question remains, where is the country lagging? Is the strategy it follows to utilise this potential appropriate? Mamidala believes that India has the right strategy in place. “The current government has successfully implemented several good initiatives, however, some more stringent enforcement of regulations in packing, transporta-

tion, handling, and storage of perishables and pharma products will be needed. This will lead to more demand for quality infrastructure, operations, and services,” he explains.

Kohli states, “Timely attention by the government and related trade bodies was not paid towards achieving a marked improvement in the development of cold storage across the country, which could have played a vital role in strategising a smooth passage for cold chain logistics. However, it is heartening to note that several steps are in the offing by all stakeholders to move forward positively in this regard.”

According to Singh, “The consumption of CPG goods in India is just going to grow by leaps and bounds. The requirement to increase shelf life of the product and reduce loss necessitates that the cold chain industry move from traditional to modern methods of creating and operating the infrastructure. Unfortunately, in India, there are hardly any cold storage facilities that cater to multiple products. This requires huge investments in terms of infrastructure and technology. The cost of operations is also very high, driven essentially by the high cost of power and fuel required to operate the warehouse. The government, as a strategy to support the industry, has incentivised development of cold storage infrastructure. This is a positive step towards making the setting up of a storage facility viable.”

REDUCE WASTAGE, INCREASE REVENUE

Mamidala emphasises on strict implementation of regulations to ensure that perishables are handled, processed, and managed within standard temperature-controlled transporta-

tion methods and facilities to help reduce wastage.

According to Singh, “Cold chain infrastructure in India is not fully modernised yet. Capacity is spread unevenly across India and given the size of our country, this is a huge challenge. Integrated facilities must be set up at the farm gate. It is important to invest in the development of skilled labour and vehicle drivers. The industry must look at using alternate sources of power to reduce the operating cost of storage facilities and create awareness in the country that wastage must be avoided at all cost.”

Kohli feels that improved quality in production will lower the need for frequent quality control checks. “Lean business processes allow operators to focus on quality on the front end. This cuts the cost of the product in the long run. Furthermore, lead times, one of the greatest areas of waste within a company, can and should be controlled through process improvement,” he explains.

Nair shares that one of the major reasons for food wastage is the lack of an efficient cold chain infrastructure from farm to fork, which includes refrigerated transport, pack houses, collection centres, and cold storages. “A range of commodities such as fruits, vegetables, dry fruits, spices, pulses, and milk can be stored at multi-purpose cold storage facilities throughout the year. With separate chambers operating at various temperatures that are simultaneously maintained, these facilities save cost and space and deliver efficiency. Even though multi-purpose cold storages command a minuscule percentage as compared to single commodity storages, this number is slowly improving due to growth of organised retail and the food processing business,” he concludes. 📌

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The change is revolutionary Vintage to Hi-Tech

The advent of innovative technological solutions in the warehousing sector has revolutionised the entire supply chain. Automated processes are replacing manual ones, thus resulting in improved productivity and greater efficiency.





Picture courtesy: GreyOrange



Kalpana Lohumi

The warehouses of the 90s were often tumbledown structures that merely served as a roof over the goods stored in them. Today, with rapid growth in technology, these structures have evolved to being state-of-the-art facilities and one of the most crucial aspects of the logistics industry. From mere four-walled godowns to AI-powered, robot-operated facilities, the warehouses of today are four times more efficient than the non-automated ones. **CARGOTALK** gets industry players to share their view on the significance of technology in the warehousing sector, what lies ahead, and whether India has a long way to go in launching robot-operated warehouses that seem to be the next definite step in achieving greater efficiency.

R Shankar, CEO, TVS Supply Chain Solutions, says, "Technology is enabling the warehousing industry to improve overall supply chain efficiency, eliminate waste, and meet

increasing customer demands. The warehousing sector is evolving and growing rapidly, with both technology and the business environment driving it. Technology is simplifying all key activities inside a warehouse, including goods receipt, storage, and picking and dispatch. Unlike the past, all transactions now take place through warehouse management systems and are digitised."

With the development in automatic data capture through technologies like real-time locating systems and RFIDs, adds Shankar, warehouses have become more efficient in resource optimisation, tracking of consignment, and space utilisation.

Kartik Gandhi, Director, Gandhi Automations, is of the opinion that the world of logistics is moving to an uberised model where owning traditional assets is no longer a requirement to be a viable logistics company. "A competitor to a traditional logistics service provider

The next decade

- Maximising the efficiency of the entire economy is crucial for success. Most Indian manufacturers today are not at a stage where they can automate most of their processes, yet those that can automate processes should certainly do so.
- Over the next decade, by using the best of automation and human capital, the Indian industry may fulfill its true potential, something that has eluded it thus far.



R Shankar
CEO
TVS Supply Chain Solutions

“
India has abundant
workforce, hence
warehouse robotics
will focus on improving
efficiency rather than
replacement of labour
”



Kartik Gandhi
Director, Gandhi Automations and Winner,
India Cargo Award (North & East), 2017

“
Industrial and
robotic automation
is in the process
of being commonly
implemented
in India
”

need not just be another LSP, but can be any platform provider, or industrial automation or technology company that can aggregate supply and demand while providing logistics solutions at one place and meeting a customer's requirement. This may look theoretical to a few, but is not impossible. To compete, companies need to be equipped with the best possible technologies, including an integrated automation system, to manage all the logistical and business complexities found in the supply chain,” he explains.

Reiterating his view that a country as large as India can use automation in tandem with its huge demographic divide to create a manufacturing base, Gandhi says,



“This manufacturing base may produce goods made on production lines using human hands, while also manufacturing increasingly sophisticated products using automation. Many companies in India, even in the face of global competition, can manufacture goods more efficiently than those in other countries.”

Commenting on why supply chain automation is becoming imperative, **Vivekanand**, Country Manager – India & SAARC, GreyOrange, believes that with the e-commerce boom and rise of omnichannel retail, supply chain faces an increased pressure of dealing with massive volumes of orders to be shipped every day, levying additional pressure on warehouses. “Traditional methods and operations have failed to deliver on the growing require-

ments for higher speed, accuracy, and efficiency. Their inability to adapt and scale up as per business needs results in higher operating costs. Warehouses are a critical part of the supply chain and with growing complexities, evolving market trends and consumer demands, their automation has become the need of the hour. We are witnessing a shift towards smart, agile distribution facilities laden with applications of robotics, AI, and Machine Learning,” he explains. Vivekanand also says that e-commerce continues to cause an upsurge in retail business, leading warehouses to rely more and more on technology. As players realise the importance of automation in supply chains, the digital trends and the bot economy will lead to futuristic warehouses for a business to stay ahead of the curve.



Picture courtesy: GreyOrange

IS CLOUD TECHNOLOGY THE FUTURE?

Cloud and SaaS choices for supply chain software are becoming common, especially for companies that see supply chain as a strategic move. While there is no denying this fact, the question is how well-equipped India is in adopting cloud technology. **Amar More**, Director, Kale Logistics Solutions, says, "Cloud technology enables SMEs to access a set of services using data storage on a third-party server. This allows SMEs to benefit from technologies that would traditionally have been within reach of large enterprises with huge IT budgets. There are quite a few cloud-computing services that are available for a small monthly payment, without the staggering cost of upfront fee or lock-in periods. An SME can be up and running in no

time and at a fraction of the cost of buying or developing software in-house."

He further shares that the latest data localisation initiatives in the realm of cloud computing have led to questions around infrastructure investment and its challenges. "In India, infrastructure and connectivity challenges are hurdles that need to be overcome before we can reasonably expect this technology to take off on a huge scale," explains More.

Shankar says that cloud technology certainly enables cost reduction, scalability, better productivity and high flexibility, and most cloud technologies are based on pay-per-use models, thus reducing the high initial investment cost on hardware, licences, etc. He

adds, "Cloud-based services also reduce setup time and permit remote access, thus proving to be an effective tool for SMEs. The cloud technology market in India is growing tremendously, with bigger companies already adopting it. It is only logical that SMEs also move towards the same. Most Indian cities are fully-equipped with the infrastructure to complement cloud technology. While data security continues to be a key concern, it is being addressed."

ROBOTIC WAREHOUSES DREAM OR REALITY?

The warehouse robotics market stands tall as one of the most proactive industries globally. This brings up the point of India's position in this evolving sector, and the distance we need to traverse to begin competing with other countries on his front. Sharing his point of view, Vivekanand says, "Warehouse robotics forms a major component of the automation sector globally. In the last five years, e-commerce and logistics companies across the globe and those in India have pioneered adoption of advanced robotic technologies to create high productivity warehouses and optimise supply chains to match the dramatic evolution in terms of volumes and value. Automation has made successful inroads into these applications, given complexities in supply chains for e-commerce."

According to studies, the industrial automation market in India is worth \$2 billion. Vivekanand believes that the scope for automation has increased in the country with the GST coming in. He further explains, "With massive volumes and a higher competitive market scenario, we see players embracing technology in a big way to drive a seamless user experience to blend in with the increasingly digital world and provide convenience



Amar More
Director, Kale Logistics Solutions and
Winner, India Cargo Award (West & South), 2017

“
Manufacturing,
logistics, retail, and
e-commerce sectors
are the key areas for
significant warehouse
automation
”

Quick Fact

■ The global warehouse robotics market was valued at \$2442 million in 2016 and is expected to reach \$5,186 million by 2023, to grow at a CAGR of 11.6 per cent, per industry estimates.



Vivekanand
Country Manager – India & SAARC
GreyOrange

“
As demand for warehousing space increases, industrial automation and demand for such solutions is set to grow
”

QuickFacts

■ Globally, North America ranks first in the adoption of warehouse robotics, with Asia Pacific being a close second.

■ The APAC region is expected to register a CAGR of 12.6 per cent from 2016 to 2023, per industry estimates.



Picture courtesy: GreyOrange

and benefits to the consumer. The vital challenge is faster adoption of new-age technologies and trends such as 3D printing, automation, robotics, and Big Data in the supply chain function.”

Shankar also feels that post GST, warehouses are increasingly getting consolidated. He says, “In India, warehouse automation is projected to grow at a CAGR of 10-12 per cent; growth in e-commerce has also led to the paradigm shift in warehouse automation. Low-cost automations are in high demand, but for high precision and high throughput warehouses, high-cost robotics are implemented. However, unlike developed markets, India has abundant workforce, hence warehouse robotics will be focused on improving the overall efficiency of the warehouse rather than replacement of labour.”

More says that such technology adoption improves accuracy and enables automation in addition to empowering space optimisation and operational efficiencies. “Within the APAC region, bolstered by a spurt in online shopping, India is affirming the need for warehouse automation. Many warehouses in India already benefit from the presence of new-generation robots, with manufacturing, logistics, retail, and e-commerce sectors being the key areas for significant warehouse automation,” he adds. More also feels that the key drivers of growth for warehouse robotics in India have been rapid technological advancements, increase in digitisation

of warehouses, a burgeoning e-commerce industry, and the marked need for refined quality and reliability in warehouses.

On these lines, Gandhi shares, “With regard to the increasing emphasis on the government’s ‘Make in India’ campaign and the need for meeting global manufacturing standards, huge opportunities for foreign players arise, as industrial and robotic automation is in the process to be commonly implemented in India.”

This brings us to the aspect of Automatic Guide Vehicles (AGV) being the next step in turning warehouses into efficient management hubs. Shankar notes, “Developed markets are already using AGVs for transportation of parts within the warehouse and from warehouse to assembly lines, where the task is repetitive. Routing and scheduling the AGV can increase warehouse productivity, accuracy, and output. Presently, in India, employee-operated MHEs are utilised to the

maximum because of the nature of our operations and the need for flexibility. For high volumes, where the process is standardised and repetitive, AGVs can be deployed. A few Indian and multinational companies have already begun adopting AGVs.”

Adding to that, Vivekanand points out that there is massive potential for emerging technologies in the supply chain today. The rise in AGVs is one of the key trends accelerating the deployment of robotics and AI in supply chain. These robots help reduce multiple touchpoints in a warehouse, thereby helping in inventory management and storage, as well as replenishment and order picking in fulfilment and distribution centres. “As demand for warehousing space increases, driven by e-commerce and retail activity, industrial automation and demand for such solutions is set to grow, to ensure growth in operations and more flexibility for wider distribution networks,” he concludes. 📌



Picture courtesy: GreyOrange

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Wanted: Skilled resour

The warehousing sector has been undergoing a fundamental change since the introduction of GST and other reforms. However, the lack of training institutes adds to the woes of the sector in India. Key experts from the cargo trade elaborate on how this is affecting the industry and suggest possible solutions.



CT Bureau

CAPT TS RAMANUJAM

CEO, Logistics Sector Skill Council (LSC)



With the advent of technology, there is a greater need for skilling in the warehouse sector. LSC created roles for the warehousing sector in which they have gone beyond the usual activity into a multitasking training role. Job roles are being categorised in four parts, namely, warehouse associates who will look after physical supply chain which includes packaging, billing, labelling, etc; warehouse executives who'll look after IT, documentation and information slot;

warehouse supervisors who will care for allocation of resources and daily management; and warehouse managers who are going to be in charge of profit generation. Over 30 companies across India have signed and agreed upon these roles. We are getting substantial purchase from the industry in setting up of training centres.

We are also educating the industry to introduce apprenticeship programmes in which we have included diploma training for technical manpower required for maintenance. We are also introducing degree apprenticeship for which we have signed with 22 institutions across the country to provide a formal training in the industry. The turnout of girls in huge numbers is a great sign for sustaining the standards council.



DIVYA JAIN

Founder, Safeducate



The sector is already witnessing consolidation where smaller warehouses are paving way for massive ones with modern technologies. India's warehouses are still dependent on manpower rather than robotics in an effort to save capital expenditure. Currently, there is a huge gap in knowledge and skill set required in the warehousing sector; in fact, there are very few professionals in these sectors and most of the work is carried out by generalists or unskilled manpower. Evolving warehouse

management processes and operations with more demanding customers, lack of attraction for new recruits arising from poor working conditions, relatively less attractive incentives and benefits, and the emergence of attractive alternate career options are reasons that contribute to skill shortage in the Indian warehousing sector.

As per an NSDC report, the warehouse sector currently employs over 16.74 million people and is slated to recruit more than 28.4 million employees by 2022. This implies an additional creation of 11.7 million jobs. This sector will be requiring more of skilled manpower due to technological changes as well as evolving customer expectations. Almost 75 per cent of workforce in warehousing is involved in picking and packing jobs. Lower levels of organisations face high attrition. Currently, we don't have sufficient training institutes to skill the manpower in warehousing sector. Lack of skilled manpower will result in unutilised space, lack of proper inventory management, etc.





RAHAT SACHDEVA

Vice President, Rahat Continental and Winner, India Cargo Award, 2018



Even in a highly automated and system-controlled design, warehouse operations are heavily dependent upon people to run and manage operations. Operations staff are always the key who manage shipments, holding the main forte like material picking tasks and other operations including labelling, packing, kitting, inventory counting, documentation and systems operations.

In third party-managed warehouses, the workforce strength is often an issue that affects operational efficiency. Few local managements try to cut corners by understaffing at various levels and extending the working hours or job responsibilities to save costs. Any warehouse operation needs to have an optimum workforce based on clear-cut tasks and volume of transactions. As all operations are time-bound activities with inter-related tasks and dependencies, estimation of work and work division clarity is essential to avoid overstaffing or understaffing. Overstaffing can result in slackness in individual performance levels besides increasing costs.

In warehousing operations, process and system compliance demands keen focus and discipline at all levels. The skillsets and attitude requirements are different for different jobs. At the operating level, people are required to understand what is expected of them, be able to follow the process, and comply with the process and instructions. Operations require manual dexterity and ability to be on feet for long durations besides being able to bend down and reach up constantly to pick up items. These points must be kept in mind and evaluated while hiring people.



AJAY KANWAR

Associate Director – Retail Solutions, Holisol Logistics



A dearth of formal training institutes has affected the quality of resources and cost of operations in the logistics sector. The industry is growing at a steady rate especially after being granted the status of infrastructure. However, we are still struggling with the absence of minimum skills in warehousing operations. Currently, these resources are being trained in an unorganised manner, which affects the quality and efficiency in warehousing operations. The resources are needed

to be not only trained in physical operations but also on usage of the system including software training. This leads to additional time and cost which in turn impacts the overall cost of operations. There is a need for organised training for minimum skills required at different levels in warehousing operations. The industry needs support in the introduction of the skill development programme which is accessible and affordable to people. This will enable them to become employable and develop their career in the warehousing sector.

Highlights:

- The warehouse sector currently employs over 16.74 million people and is slated to recruit more than 28.4 million employees by 2022.
- LSC is educating the industry to introduce apprenticeship programmes in which they have included diploma training for technical manpower required for maintenance.

Being more productive

With a focus on unblocking bottlenecks and capitalising on opportunities, PHD Chamber of Commerce organised the National Maritime Conclave - 2019 in New Delhi. The conference was graced by the presence of dignitaries from the ministries of commerce & industry and agriculture & farmer welfare, along with other industry professionals.

N SIVASAILAM

*Special Secretary (Logistics), Department of Commerce
Ministry of Commerce and Industry*



All countries with which we compare our logistics cost have it between 7-10 per cent, and that is where the catch lies at present. When you come to think of logistics cost, the interpretation of 13 per cent would be that every rupee spent on logistics should drive more. If 13 per cent of logistics cost is supporting 87 per cent of the rest of the industry, we would like to increase logistics because that's what would provide business. Logistics is an inherent part of value addition in a product. The Department of Commerce, in consultation with Ministry of

Shipping and the Indian Port Association (IPA), is addressing the issues relating to port charges and shipping funds so that both domestic exports and imports become cost-effective.

The Exim Bank has already come out with 'shipping funds' to provide funding assistance to the shipping industry for a period ranging between seven to 10 years. However, the industry is demanding that the life of such funds stay within the period of 20-40 years and therefore, efforts are on to find a suitable arrangement so that funds accessed by industry through this channel also become cost-competitive for both stakeholders.

DILIP KUMAR GUPTA

*Managing Director
Sagarmala Development Company*



The present government began this programme in 2015 to make full use of the potential of a 7500-kilometre coastline. Project implementation under Sagarmala has been advancing progressively, and one-third of projects have already been completed; the remaining will have been commissioned by 2020. Additionally, 1900 kms of roadways and 1900 kms of rail linkages are also expected to be commissioned as per schedule.



PAWANEXH KOHLI

*Chief Advisor & CEO, NCCD
Ministry of Agriculture & Farmer Welfare*



As an industry, we must all try to make logistics more productive. Increasing port capacity to cater to the growing traffic will automatically bring down the cost of operations and per unit cost of goods handled.

The mindset, however, needs to be changed in terms of being productive for the same cost. For instance, we can increase our capacity utilisation which should be done with greater operational efficiency.

The industry must speak to the government about turnarounds to help them become more productive. The idea of multimodal logistics is to make sure that every part of the country is connected to any possible exit point. Logistics is a bridge and it's good to ensure that the length of the bridge becomes shorter, but how do we make sure logistics, as a wider spread, has greater affectivity?

at the same cost



V KALYANA RAMA

Chairman and Managing Director
Container Corporation of India



The need of the hour is to reduce transaction costs both for agricultural commodities as well as industrial products. Logistics solutions are not clearly developed in our country. Using a coastline and coming out with seamless multimodal transport will reduce the logistics cost. CONCOR is setting up 120 centres across the country for effective distribution of multiple products so that the transaction cost for products and commodities is rationalised.

PN SHUKLA

Director, Gati



Port modernisation should not be taken only for international business. With a 7500 km coastline, everybody is only thinking of international exports, which doesn't make sense for modernisation. We must think of leakages of our ports for domestic cargo and that only can bring a change in mindset, like investing big in international ports, existing ISO containers, etc. Once you are doing domestic business, you have to bring down your ease of doing business and then there have to be ports which will serve you internally along the coastline. Hence, it becomes

crucial that modernisation take care of domestic cargo. The focus, however, is missing. I believe that ports which are getting modernised must develop the network for domestic business; here we need government support.

CAPT SURESH N AMIRAPU

Chief Executive Officer
PSA Bharat Mumbai Container Terminals



The first major problem we are facing with the ports is that we don't have a master plan. Investment in ports in India is a little haphazard because of this. What is also important is that if there is a master plan for the 12 major ports, it should be transparent. The issue really is lack of coordination. The second point I want to highlight is evacuation. Here again, it's a question of coordination because as a port operator or terminal operator, I can bring international standards and bring the highest productivity level internally, but once I step out,

it all comes back to square one. There is no holistic integration among various departments, divisions, and policymakers. We must look at issues with a larger perspective if we want to be future-ready.

Highlights:

- The Exim Bank has already come out with 'shipping funds' to provide funding assistance to the shipping industry for a period ranging between seven to ten years.
- CONCOR is setting up 120 centres across the country for effective distribution of multiple products so that the transaction cost for products and commodities is rationalised.
- If there is a master plan for the 12 major ports, it should be transparent. The issue really is lack of coordination.



PHD's National Maritime Conclave

PHD Chamber of Commerce recently organised the National Maritime Conclave in the capital, which was graced by the presence of **N Sivasailam**, Special Secy. (Logistics), Dept. of Commerce, Ministry of Commerce & Industry, Govt. of India and **Dilip Kumar Gupta**, MD, Sagarmala Development Company, among others.





IndoSpace plans rigorous expansion

With a strong pipeline of projects, IndoSpace plans to invest in the West, North and South, while also exploring opportunities in the East of India. **Rajesh Jaggi**, Managing Partner – Real Estate, Everstone Group, talks about the vision of the company to support the growth and modernisation of India's supply chain.



CT Bureau

IndoSpace made headlines after acquiring Orris' logistics park near Gurugram. Please tell us about this investment.

This park - IndoSpace Luhari III - is close to the Delhi-Jaipur highway and spread across 67 acres. The site is within proximity of several large industrial clusters such as IMT Manesar, Dharuhera, and Bhi-

wadi. Good regional connectivity makes the site an ideal location for auto majors and auto component manufacturers, third party logistics services (3PLs), consumer goods companies, and retailers to establish their distribution centres to service various parts of northern India.

We currently have two operational parks in Luhari (Luhari I and Luhari II), spread across a combined area of 66 acres and catering to the key markets in North India. With the new addition, IndoSpace will double its acreage in Luhari.

What is the company's strategy behind investments in logistics parks?

Our strategy consists of both approaches - build and buy - under which we explore investment opportunities across Greenfield and brownfield assets. We have around 31 million sqft (2.9 million sq. mt.) of fully-developed and stable leased assets, and brownfield construction. We have an active development pipeline and target of achieving 10 million sqft of logistics space in each of the three regions - North, South and West - while actively exploring expansion

opportunities in the East. Our overall aim is to build a pipeline of 120 million sqft of modern logistics infrastructure.

IndoSpace is also focused on the development of sustainable industrial and logistics parks in India by adopting sustainable technology and environmentally friendly materials. Adopting various Green initiatives, such as the Environmental & Social Governance (ESG) norms, IndoSpace parks also have the esteemed EDGE rating from GBCI (Green Business Certification). This rating means the buildings possess several Green achievements for a reduced carbon footprint.

How has the journey of transforming industrial real estate been so far?

With the start of the millennium, large multinationals were keen on setting up shop for manufacturing or distribution in India, but were facing challenges finding warehousing and manufacturing spaces of world-class quality and the quantity they were used to. Spotting this trend early, IndoSpace started developing assets to meet this need. To leverage its first-mover advantage, the main task was to acquire strategically-

Highlights:

- As per JLL data, 2018 observed a 22 per cent y-o-y growth in total stock in grade-A and B warehousing in the top eight cities at 169 mn sqft, compared to 138 mn sqft a year ago.
- Growing consumption across the economy has led to an increase in demand for organised grade-A warehousing. These demands are coming from metros as well as Tier-I cities.

Rajesh Jaggi
Managing Partner – Real Estate
Everstone Group

“We have an active development pipeline and target of achieving 10 mn sqft of logistics space in the North, South, and West

located land parcels in an efficient and transparent manner, and in coordination with the local people. From our first land purchase in Chakan (Pune) to our latest park in Rajpura (Chandigarh), we have come a long way. IndoSpace now has strategic land locations, which means that its industrial parks are well-connected to urban hubs, railways, airports, and ports.

IndoSpace is a partner to various national as well as multinational names such as IKEA, Amazon, DHL, Caterpillar, Bosch, Steelcase, and Delhivery.

Our reach allows clients to work with a single development partner for all supply chain facility needs. Last September, we formed a strategic long-term partnership with GLP. Through this partnership, GLP has become an investor

in IndoSpace Core, a joint venture established in 2017 by IndoSpace and the Canada Pension Plan Investment Board (CPPIB) that is focused on acquiring and developing modern logistics facilities in India. IndoSpace also closed its third fund last year.

In addition, Everstone Group and GLP have partnered to invest around \$500 million in strategies and technologies to enhance logistics efficiency in India. The partnership enables IndoSpace to leverage GLP's fund management, development and operational expertise and resources, as well as GLP's extensive global customer network to further strengthen the former's leadership position in India. 🇮🇳

Highlights:

- According to CBRE findings, 3PL service providers in engineering, manufacturing, and e-commerce sectors contributed to the growth of leasing activity in the second half of 2018 followed by retail, FMCG, and electronics.

All-size pallets for ease

Ajay Jhalani, Managing Director, Winner Technoplast, talks about the company's product line and its aim to acquire a quarter of the market share by 2022.



Please tell us about your product portfolio.

We manufacture injection moulded plastic pallets and are one of Asia's largest manufacturers. We produce and distribute our products in conformity with the highest standards in order to meet our customers' application requirements. We manufacture over 500 models of plastic pallets (ranging between 5-50 kg), from export to warehouse pallets for stacking and racking purposes.

How beneficial are these products to the industry?

The warehousing industry has

evolved in the last five years, and from godowns to logistics parks, it has been a long journey. New racking systems are getting installed and resulting in a huge demand for plastic pallets. A palletised product can easily be transported from factory to warehouse to customer, with basic warehouse equipment.

What does the future hold for you in terms of expansion?

As far as expansion plans go, we are planning to set up our plant in India to manufacture 300,000 pallets per year. This will be operational from January 2020.

“We are planning to set up our plant in India to manufacture 300,000 pallets per year; this will be operational from January 2020

The current market is around ₹600 crore per annum, and is growing at an annual rate of 20 per cent. We aim to capture 25 per cent of the market share by 2022. 🇮🇳



Ajay Jhalani
Managing Director
Winner Technoplast

Schenker puts forward a big foot

Schenker India plans to strengthen its footprint and become one of the largest warehousing players in the country over the next three years. **Vishal Sharma**, Chief Executive Officer, Schenker India and Indian Subcontinent, gives a peek into the roadmap that will help the company achieve this target.



CT Bureau

In your opinion, how is automation shaping the logistics industry?

Automation has been the buzzword for years in India. However, with the increase in cost of manpower across multiple geographies in India and the availability of technology at a lower and more reasonable cost, the buzzword has become our reality. It is an added advantage to logistics partners not only to scale the business exponentially, but also to reduce direct and variable costs in the business environment.

What are the technological trends that DB Schenker is keeping an eye on?

DB Schenker has been constantly improving its service offerings to customers in different facets. With some of the initiatives rolled out in 2018 and a few more coming up in 2019, the company has launched its eSchenker platform which allows customers to book shipments on a single platform. We have also successfully launched Connect 4.0 (in a few countries in the APAC region) to enable SME customers to trade online. The company has also been investing extensively in the TMS solution that provides final-

“By 2022, Schenker India aims to double its capacity, supported by ‘Enterprise Lab for Logistics and Digitisation’”

mile delivery updates in real time. We continue to watch the e-commerce space to provide compelling solutions to customers, in turn allowing them to focus on the customer's core needs.

DB Schenker has collaborated with IAM Robotics to create ‘Warehouse of the Future’, and this will lead to automation within the logistics business of the company with minimisation of human involvement in the processes.

What is the roadmap for Schenker India's growth?

As the Indian arm of one of the world's leading integrated logistics players, Schenker India managed to deliver a double-

digit growth in the top line. Moving forward, the company plans to grow its cross-border road transport services and contract logistics to make deeper inroads into verticals like automotive, electronics, consumer and retail, as well as aerospace industries.

The company plans to strengthen its local footprint and become one of the largest warehousing players in the country over the next three years. It is currently directing its forces to double its warehousing capacity spread across 53 warehouse locations, as well as to enhance efficiencies through technological deployment for faster processing and real-time updates across the value chain. By 2022, Schenker India is aiming to double its capacity in terms of footprint. The plans of expansion will be supported by DB Schenker's state-of-the-art ‘Enterprise Lab for Logistics and Digitisation’ located in Germany. 🇮🇳



Vishal Sharma
Chief Executive Officer
Schenker India and Indian Subcontinent

Department of Commerce

Export Import Data Bank; Export: Commodity-wise

* ITC HS Code of the Commodity is either dropped or re-allocated from April 2018

Dated: 29/5/2019; Values in Rs. Lacs; Sorted on HSCode

HS Code	Commodity	2017-2018	%Share	2018-2019 (Apr-Feb)	% Share
01.	Live animals	41,147.97	0.0210	23,657.91	0.0114
02.	Meat and edible meat offal	2,692,150.09	1.3760	2,379,498.75	1.1460
03.	Fish and crustaceans, molluscs and other aquatic invertebrates	4,417,576.30	2.2579	4,047,210.84	1.9493
04.	Dairy produce; birds' eggs; natural honey; edible prod. Of animal origin, not elsewhere spec. or included	236,376.14	0.1208	319,109.90	0.1537
05.	Products of animal origin, not elsewhere specified or included	78,403.06	0.0401	84,308.53	0.0406
06.	Live trees and other plants; bulbs; roots and the like; cut flowers and ornamental foliage	50,731.58	0.0259	52,003.18	0.0250
07.	Edible vegetables and certain roots and tubers	841,770.44	0.4302	785,843.39	0.3785
08.	Edible fruit and nuts; peel or citrus fruit or melons	1,197,292.67	0.6120	936,455.01	0.4510
09.	Coffee, tea, mate and spices	2,134,378.10	1.0909	1,949,391.15	0.9389
10.	Cereals	5,253,712.36	2.6852	4,966,319.34	2.3920
11.	Products of the milling industry; malt; starches; inulin; wheat gluten	159,470.88	0.0815	205,103.35	0.0988
12.	Oil seeds and olea. Fruits; misc. Grains, seeds and fruit; industrial or medicinal plants; straw and fodder	1,062,138.46	0.5429	1,024,576.87	0.4935
13.	Lac; gums, resins and other vegetable saps and extracts	656,874.14	0.3357	665,880.04	0.3207
14.	Vegetable plaiting materials; vegetable products not elsewhere specified or included	34,353.40	0.0176	33,982.81	0.0164
15.	Animal or vegetable fats and oils and their cleavage products; pre. Edible fats; animal or vegetable wax	814,690.66	0.4164	695,178.70	0.3348
16.	Preparations of meat, of fish or of crustaceans, molluscs or other aquatic invertebrates	272,280.84	0.1392	273,499.61	0.1317

HS Code	Commodity	2017-2018	%Share	2018-2019 (Apr-Feb)	% Share
17.	Sugars and sugar confectionery	656,524.46	0.3356	953,755.97	0.4594
18.	Cocoa and cocoa preparations	114,434.55	0.0585	125,412.94	0.0604
19.	Preparations of cereals, flour, starch or milk; pastry cooks products	346,994.31	0.1774	338,585.87	0.1631
20.	Preparations of vegetables, fruit, nuts or other parts of plants	376,937.75	0.1927	369,455.16	0.1779
21.	Miscellaneous edible preparations	467,970.20	0.2392	482,406.92	0.2323
22.	Beverages, spirits and vinegar	223,411.80	0.1142	204,150.71	0.0983
23.	Residues and waste from the food industries; prepared animal fodder	940,570.47	0.4807	1,168,313.91	0.5627
24.	Tobacco and manufactured tobacco substitutes	602,171.01	0.3078	619,878.48	0.2986
25.	Salt; sulphur; earths and stone; plastering materials, lime and cement	1,431,324.45	0.7316	1,411,960.49	0.6800
26.	Ores, slag and ash	1,158,657.68	0.5922	1,131,439.89	0.5449
27.	Mineral fuels, mineral oils and products of their distillation; bituminous substances; mineral waxes	24,790,423.37	12.6707	30,792,189.76	14.8306
28.	Inorganic chemicals; organic or inorganic compounds of precious metals, of rare-earth metals, or radi. Elem. or of isotopes	1,117,469.19	0.5712	1,259,948.08	0.6068
29.	Organic chemicals	9,538,061.91	4.8750	11,402,743.93	5.4920
30.	Pharmaceutical products	8,544,729.55	4.3673	9,281,237.95	4.4702
31.	Fertilisers	68,515.82	0.0350	94,749.31	0.0456
32.	Tanning or dyeing extracts; tannins and their deri. Dyes, pigments and other colouring matter; paints and var; putty and other mastics; inks	1,895,079.46	0.9686	2,082,524.17	1.0030

Contd. on page 48 ►

HS Code	Commodity	2017-2018	%Share	2018- 2019 (Apr-Feb)	% Share
33.	Essential oils and resinoids; perfumery, cosmetic or toilet preparations	1,206,587.50	0.6167	1,274,738.40	0.6140
34.	Soap, organic surface-active agents, washing preparations, lubricating preparations, artificial waxes, prepared waxes, polishing or scouring prep	377,969.53	0.1932	387,951.29	0.1869
35.	Albuminoidal substances; modified starches; glues; enzymes	152,542.06	0.0780	161,427.96	0.0777
36.	Explosives; pyrotechnic products; matches; pyrophoric alloys; certain combustible preparations	71,467.97	0.0365	75,289.62	0.0363
37.	Photographic or cinematographic goods	7,198.28	0.0037	7,490.83	0.0036
38.	Miscellaneous chemical products	2,507,984.08	1.2819	2,894,795.40	1.3942
39.	Plastic and articles thereof	4,092,781.63	2.0919	5,115,850.82	2.4640
40.	Rubber and articles thereof	1,909,123.25	0.9758	2,019,679.33	0.9727
41.	Raw hides and skins (other than furskins) and leather	563,668.56	0.2881	468,559.33	0.2257
42.	Articles of leather, saddlery and harness; travel goods, handbags and similar cont. Articles of animal gut (other than silk-worm) gut	1,563,155.20	0.7989	1,641,120.52	0.7904
43.	Furskins and artificial fur, manufactures thereof	7,690.23	0.0039	7,853.55	0.0038
44.	Wood and articles of wood; wood charcoal	258,950.05	0.1324	293,501.61	0.1414
45.	Cork and articles of cork	1,823.60	0.0009	2,407.55	0.0012
46.	Manufactures of straw, of esparto or of other plaiting materials; basketware and wickerwork	15,812.02	0.0081	24,651.64	0.0119
47.	Pulp of wood or of other fibrous cellulosic material; waste and scrap of paper or paperboard	753.80	0.0004	2,304.24	0.0011
48.	Paper and paperboard; articles of paper pulp, of paper or of paperboard	922,022.52	0.4713	1,249,954.47	0.6020

HS Code	Commodity	2017-2018	%Share	2018- 2019 (Apr-Feb)	% Share
49.	Printed books, newspapers, pictures and other products of the printing industry; manuscripts, typescripts and plans	174,627.95	0.0893	254,595.39	0.1226
50.	Silk	49,649.12	0.0254	53,838.19	0.0259
51.	Wool, fine or coarse animal hair, horsehair yarn and woven fabric	105,976.35	0.0542	122,385.13	0.0589
52.	Cotton	4,541,150.87	2.3210	4,977,118.24	2.3972
53.	Other vegetable textile fibres; paper yarn and woven fabrics of paper yarn	291,327.73	0.1489	273,797.79	0.1319
54.	Man-made filaments	1,398,442.70	0.7148	1,450,589.55	0.6987
55.	Man-made staple fibres	1,321,200.03	0.6753	1,201,765.80	0.5788
56.	Wadding, felt and nonwovens; special yarns; twine, cordage, ropes and cables and articles thereof	251,919.80	0.1288	271,901.34	0.1310
57.	Carpets and other textile floor coverings	1,102,805.25	0.5637	1,131,791.77	0.5451
58.	Special woven fabrics; tufted textile fabrics; lace; tapestries; trimmings; embroidery	242,500.44	0.1239	235,242.88	0.1133
59.	Impregnated, coated, covered or laminated textile fabrics; textile articles of a kind suitable for industrial use	150,658.19	0.0770	162,934.82	0.0785
60.	Knitted or crocheted fabrics	221,085.05	0.1130	276,152.72	0.1330
61.	Articles of apparel and clothing accessories, knitted or crocheted	5,152,599.51	2.6336	4,949,443.45	2.3838
62.	Articles of apparel and clothing accessories, not knitted or crocheted	5,621,348.40	2.8731	5,139,189.22	2.4752
63.	Other made up textile articles; sets; worn clothing and worn textile articles; rags	3,230,702.05	1.6513	3,355,255.63	1.6160
64.	Footwear, gaiters and the like; parts of such articles	1,821,507.69	0.9310	1,862,111.21	0.8969
65.	Headgear and parts thereof	26,527.22	0.0136	28,930.54	0.0139
66.	Umbrellas, sun umbrellas, walking-sticks, seat-sticks, whips, riding-crops and parts thereof	1,259.12	0.0006	2,091.87	0.0010

HS Code	Commodity	2017-2018	%Share	2018-2019 (Apr-Feb)	% Share
67.	Prepared feathers and down and articles made of feathers or of down; artificial flowers; articles of human hair	150,248.51	0.0768	135,383.73	0.0652
68.	Articles of stone, plaster, cement, asbestos, mica or similar materials	885,830.61	0.4528	988,648.44	0.4762
69.	Ceramic products	845,050.19	0.4319	1,008,043.10	0.4855
70.	Glass and glassware	463,651.06	0.2370	607,648.49	0.2927
71.	Natural or cultured pearls, precious or semiprecious stones, pre.Metals, clad with pre.Metal and artcls thereof; imit.Jewelry; coin	26,911,550.92	13.7548	25,772,587.39	12.4130
72.	Iron and steel	7,249,507.37	3.7053	6,176,306.74	2.9747
73.	Articles of iron or steel	4,379,574.04	2.2385	4,593,252.90	2.2123
74.	Copper and articles thereof	2,203,405.11	1.1262	616,396.26	0.2969
75.	Nickel and articles thereof	27,319.30	0.0140	42,909.47	0.0207
76.	Aluminium and articles thereof	3,078,767.21	1.5736	3,648,478.70	1.7572
78.	Lead and articles thereof	255,721.83	0.1307	255,690.34	0.1231
79.	Zinc and articles thereof	616,799.65	0.3153	393,349.10	0.1895
80.	Tin and articles thereof	7,626.18	0.0039	6,286.28	0.0030
81.	Other base metals; cements; articles thereof	36,235.51	0.0185	38,213.61	0.0184
82.	Tools implements, cutlery, spoons and forks, of base metal; parts thereof of base metal	534,429.06	0.2732	565,801.62	0.2725
83.	Miscellaneous articles of base metal	376,350.91	0.1924	400,519.52	0.1929
84.	Nuclear reactors, boilers, machinery and mechanical appliances; parts thereof	11,518,730.79	5.8874	13,200,141.61	6.3576
85.	Electrical machinery and equipment and parts thereof; sound recorders and reproducers, television image and sound recorders and reproducers, and parts	6,011,330.65	3.0725	8,013,851.85	3.8597

HS Code	Commodity	2017-2018	%Share	2018-2019 (Apr-Feb)	% Share
86.	Railway or tramway locomotives, rolling-stock and parts thereof; railway or tramway track fixtures and fittings and parts thereof; mechanical	223,831.99	0.1144	314,859.01	0.1516
87.	Vehicles other than railway or tramway rolling stock, and parts and accessories thereof	11,122,918.45	5.6851	11,458,638.45	5.5189
88.	Aircraft, spacecraft, and parts thereof	1,460,928.39	0.7467	1,076,916.33	0.5187
89.	Ships, boats and floating structures	1,982,935.11	1.0135	2,644,502.07	1.2737
90.	Optical, photographic cinematographic measuring, checking precision, medical or surgical inst. And apparatus parts and accessories thereof	1,931,280.84	0.9871	2,048,496.87	0.9866
91.	Clocks and watches and parts thereof	51,792.07	0.0265	63,968.43	0.0308
92.	Musical instruments; parts and accessories of such articles	11,565.07	0.0059	12,775.44	0.0062
93.	Arms and ammunition; parts and accessories thereof	63,758.77	0.0326	76,928.02	0.0371
94.	Furniture; bedding, mattresses, mattress supports, cushions and similar stuffed furnishing; lamps and lighting fittings not elsewhere specified or inc	964,379.43	0.4929	1,083,347.74	0.5218
95.	Toys, games and sports requisites; parts and accessories thereof.	197,093.05	0.1007	269,812.12	0.1300
96.	Miscellaneous manufactured articles	356,419.23	0.1822	389,024.30	0.1874
97.	Works of art collectors' pieces and antiques	88,050.63	0.0450	62,604.45	0.0302
98.	Project goods; some special uses	28,836.71	0.0147	27,689.15	0.0133
99.	Miscellaneous goods	34,092.93	0.0174	95,690.71	0.0461
India's total export		195,651,452.80		207,626,247.77	

Source: Ministry of Commerce, Government of India



Talent Meet 2019

MyLogistics Gurukul hosted a Talent Meet at the Radisson Hotel, Delhi, to celebrate the successful completion of its first batch of industry-trained students who went through a 35-day training course – MLG 001 Freight Forwarding Basics. **Alpana Chaturvedi**, CEO, MyLogistics Gurukul, delightfully shared her experience of working with the students, over a short presentation that gave a peek into the training process. The event was well-attended by the top brass of the freight forwarding and logistics industry.







JUNE 2019

► Domestic

India Warehousing Show	New Delhi	20-22
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► International

Air Cargo Europe	Munich, Germany	4-7
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Multimodal 2019	Birmingham, UK	18-20
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Expo Carga	Mexico	18-20
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SIL Barcelona	Barcelona, Spain	26-28
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JULY 2019

► Domestic

Logmat	Chennai	11-13
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► International

Black Sea Ports & Shipping	Constanta, Romania	9-11
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AUGUST 2019

► International

Logistics Development Forum	Colorado, USA	5-7
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Transport Logistics Philippines	Pasay	15-17
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TILOG LOGISTIX Bangkok	Thailand	28-30
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SEPTEMBER 2019

► International

Materials Handling Middle East	Dubai, UAE	3-5
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Shipping Technics Logistics	Kalkar, Germany	24-25
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CeMAT Russia	Moscow	24-26
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OCTOBER 2019

► International

China (Shenzhen) International Logistics and Transportation Fair (CILF)	Shenzhen, China	10-12
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CeMAT Asia	Shanghai, China	23-26
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EVENT

JNPT conducts seminar on marketing strategies for ports



■ Jawaharlal Nehru Port Trust (JNPT) recently organised a week-long seminar on 'Marketing Strategies & Public Relations for Ports'.

As many as 14 delegates from major ports in India participated in the seminar, where they also got an overview on identifying customer expectations, analysing market trends,

and building a unique brand positioning for the port which differentiates it. Addressing delegates at the seminar, **Sanjay Sethi**, Chairman, JNPT, said, "Marketing and PR are very important aspects in the overall port growth strategy because in today's digitally-connected ecosystem, often our reputation precedes us when we explore new markets."

India Warehousing Show from June 20-22

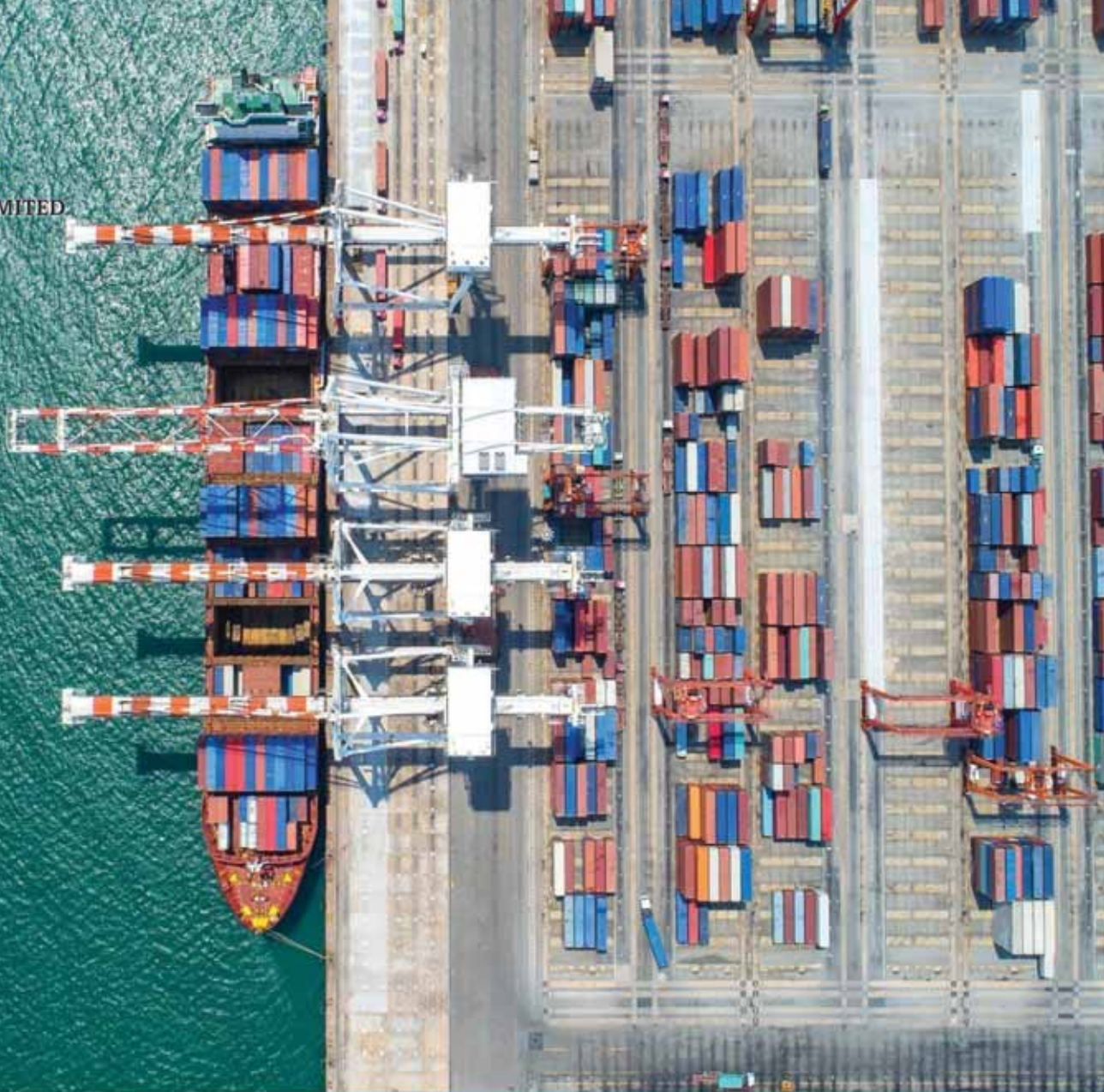


■ The ninth edition of India Warehousing Show will be held from June 20-22 at Pragati Maidan, New Delhi. This year, it is expected to bring more than 15,000 business professionals from across India and overseas to explore unmapped opportunities for their business. "The Indian warehouse market is projected to reach ₹ 968 billion by

2024, growing annually at 10 per cent. We are expecting India's share in the global trade to double in the next five years, creating a positive impact on the warehousing market globally," says **Anuj Mathur**, Chief Operating Officer – Reed Exhibitions India and Board of Director – Reed Manch Exhibitions.



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★ **IPPTA**
Mumbai

Ravi Kumar has taken over as the new Secretary General of Indian Private Ports & Terminals Association (IPPTA). Kumar has spent over 40 years in the maritime and port industry having worked with various public and private entities such as the Ministry of Shipping, JNPT, VCTPL, and JM Baxi corporate office. He brings with him vast experience and knowledge, specifically on Private Public Partnership projects and port policy. IPPTA is an association of private ports and terminal operators of container terminals and bulk terminals of India. It was formed to address the need to form a strong representative body of Indian private ports and terminal operators as an industry, which is one of the successful privatisation industries in India today. Members of IPPTA, cumulatively represent an investment of more than ₹ 6,500 crore in the port sector.



★ **CMA CGM Group**
France

The Marseilles-based shipping firm's board of directors has appointed **Rodolphe Saadé**, the current Chief Executive Officer, to succeed his father and company founder Jaques Saadé as Chairman of the Board of the CMA CGM Group. Saadé initially joined CMA CGM in 1994 in the United States, after founding a company selling water coolers in the Middle East. He then worked in Hong Kong before coming back to Marseilles to head a shipping service linking North China to Japan. From 1997 to 2000, he was in charge of a succession of different services. The CMA CGM Group is present in over 160 countries through 755 agencies, 750 warehouses, 110,000 employees, and a diverse fleet of 509 vessels. CMA CGM serves 420 of the world's 521 commercial ports and operates on more than 200 shipping lines.



★ **Shadowfax**
New Delhi

Shadowfax has appointed **Shamik Sharma** as an independent Board Director. He brings many years of solid experience building technology-driven business in the Silicon Valley as well as in India. He was a successful tech entrepreneur in the Bay area, and held senior roles at HP and Yahoo among other companies. Recently, as part of the leadership team at Myntra, he built and managed the product, engineering, UX, and data-science teams. His deep business insights come from building strong teams and leading companies through different phases, including rapid growth, difficult economic times, periods of aggressive competition, and successful exits. Sharma will be advising Shadowfax as an independent Board Director for its extensive logistics business.



★ **Blowhorn**
Bengaluru

Gautam Seshadri has been appointed as the Head of Strategy at Blowhorn. He has over 18 years' experience in investment banking, VC investing, strategy, and technology entrepreneurship. He most recently co-founded ZPX, a leading VC-funded blockchain technology start-up. Previously, he was part of the founding team at Aarin Capital, where he helped make investments in several well-known start-ups in the US and India, including Byjus and Counsyl. Seshadri began his career at UBS Warburg in London within the Fixed Income Sales & Trading division. He has a BSc (Honours) from LSE and an MBA from INSEAD.



★ **RJC**
Mumbai

Rajesh Neelakanta, Executive Director and CEO, BVC Logistics, has recently been appointed as a board member of The Responsible Jewellery Council (RJC). He will represent the service industry forum in the jewellery supply chain, from mine to retail. Neelakanta will join the current Board members and work closely with RJC's Executive Committee and management team as the organisation continues to position its recently-launched 2019 Code of Practices and drive continuous improvement in responsible business practices across the jewellery supply chain.



Blowhorn has also announced that technologist **Santosh Desai** will be taking over the role of Chief Technology Officer. Desai is an accomplished technologist, his entrepreneurial spirit and passion for solving the hard technology problems of intra-city logistics is what attracted him to Blowhorn. He has more than 13 years of experience in designing and implementing robust, internet-scale platforms and mentoring successful and durable technology teams. Blowhorn is driven by the idea of building earth's best intra-city logistics company by solving the toughest problems for customers. It believes that technology could be used to create an asset-light and efficient logistics marketplace.

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