

J. M. BAXI GROUP

TIDINGS

ISSUE VI

JULY - SEPTEMBER 2014



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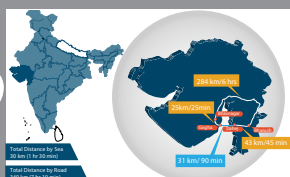
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From the Quarter Deck

The elections for the 16th Lok Sabha of the Republic of India are over.

The results are:

Political Party	Nos. of Members of Parliament
BJP	282
Allies of BJP	54
Congress	44
Allies of Congress	16
Regional Parties & Others	147
Total Seats	543
Required Majority 272 seats	

After almost three decades, the people of India have given a decisive mandate to a single political party in terms of a majority in the Lok Sabha or Parliament. The people of India have clearly and decisively declared that they would like to see the BJP and their allies, led by Mr Narendra Modi, form the new government of India.

It was indeed noteworthy that Mr Modi declared after the election victory: "India has won, good days will be ahead." One more statement of Mr Modi worth noting is: "Maximum governance, minimum government."

The challenges facing the new government are enormous, as are the challenges faced by India Inc, especially on the economic front. They include a large fiscal deficit, high inflation and interest rates, a large portfolio of non-performing assets, a strained banking system, and lastly a paralysis in policymaking and implementation. The government will thus need to:

- RESTORE
- REASSURE
- REFORM
- RESURGE

These actions though challenging are also exciting. The next two years will demand that we continue on our path of ceaseless endeavour. We need to continue to improve and develop across all our various services. We will need to continue to cope with infrastructure shortages, which are becoming glaringly apparent. With the economy headed in the right direction, our various owned and operated cargo handling facilities will prove to make a strong contribution

to the infrastructure in the maritime and ports sector of India.

The global container shipping world continues to baffle the imagination. Now there seems to be a serious discussion about building 22,000 TEU ships. The P3 alliance has just been given a rejection by the Chinese regulators and this after having received an approval from the US and EU regulators. Whilst this development puts the P3 plans on hold, the G6 alliance and the CKYHE alliance have already begun their own readjustment exercises and with the Hapag-Lloyd and CSAV merger being completed one is certainly tempted to ask 'What next now?' The fact is that soon, very soon, Indian ports will have to be able to be ready to receive these ships. We are working towards that goal at our Vizag Container Terminal.

Whilst the bulk carrier and tanker market remains subdued and depressed, the lifting of the ban on iron ore mining in Goa would undoubtedly be a bit of good news for shipowner.

The new government has lost no time in beginning to address the issue of power across all components such as generation, coal supply, transmission etc. These urgent steps are also likely to result in an enhanced supply of coal both domestic and imported which should result in greater number of ship calls and enhanced volumes of cargoes at our various Indian ports.

In these changing times, our principals, customers and partners are looking for credible solutions that are both progressive and predictive. We as an organisation will have to provide a solution-based service, which will call for a 360° vision, i.e. based on value instead of cost. Our solutions and offerings will need to be efficient, with low costs and high productivity. Important commodities including steel, fertiliser, agricultural products, mineral products such as granite, aluminium and iron ore, and products such as pharmaceuticals and engineering goods all present growth opportunities for our organisation. With our various



infrastructure facilities, we are in a unique position to offer increasingly sophisticated services to clients. In our various interactions with clients, principals and partners we are achieving breakthroughs and more importantly putting into place comprehensive partner relations, which augurs well for our company.

One of the first few pronouncements of the new Hon. Minister of surface transport and ports and shipping, Mr Nitin Gadkari, has been to encourage coastal transport resulting both saving of fuel and thus decreasing the carbon foot print. In our next issue we shall have a detailed analysis on how much each of our inland container depots assist the reduction of carbon foot print by reduction in usage of diesel powered vehicles.

In continuation of our earlier comments on the bifurcation of the state of Andhra Pradesh, Telangana State was formed on 2nd June, 2014 as the 29th State of India. Seemandhra will thus be a separate state and in the next few years we can anticipate many developments with the creation of a new capital. Both states will clamour for assistance and push for development funds and status. The Kakinada-Vizag corridor is expected to gain greater importance in the developmental efforts of the state and in a short while it will also have a petroleum and gas corridor very much like the corridor that exists today between Mumbai and Vapi, which is considered one of the most industrially productive corridors in India.

Let me sign off from this issue of Tidings from the Quarter deck by sharing with you all, my colleagues, clients, principals and partners, a renewed sense of optimism for a resurgent India ■

Krishna B. Kotak

Chairman - J M BAXI GROUP

Agency & Services

Liquid Cargo In India: Chemicals And Acids

In India, the domestic chemical industry contributes about 16% to the current GDP and the Government of India (GOI) has charted a growth plan to take its share to 22% of GDP by 2022.

Chemical industry segments

The major sub-segments of the chemical industry can be summarised as follows.

Basic Chemicals also known as commodity chemicals, include organic and inorganic chemicals, bulk petrochemicals, other chemical intermediates, plastic resins, synthetic rubber, man-made fibres, dyes and pigments and printing inks.

Specialty Chemicals also known as performance chemicals, are low-volume but high-value compounds. These chemicals are derived from basic chemicals and are sold on the basis of their function. For example, paint, adhesives, electronic chemicals, water management chemicals, oilfield chemicals, flavours and fragrances, rubber processing additives, paper additives, industrial cleaners and fine chemicals. Sealants, coatings and catalysts also come under this category.

Agricultural Chemicals include mainly crop protection chemicals such as pesticides.

Other Chemicals include chemicals used in the biotechnology sector.

Chemical plants and production facilities in India

There are various plants for manufacturing different chemicals throughout India. Nevertheless, the concentration of these facilities is relatively higher on the West Coast

mainly Gujarat with a 53% share, due to the good inland connectivity and favourable investment climate. Maharashtra has also emerged as a favoured zone due to the proximity of raw materials and supportive policies.

List of petrochemical plants, owners and locations

The petrochemical sector has been one of the fastest growing sub-sectors in the basic and specialty segments. The industry currently boasts plants meeting global standards that send products worldwide. Some of the largest players in the sector are Reliance Industries Ltd. (RIL), Reliance – IPCL,

Port	Chemicals and Lubes	Phosphoric Acid
Chennai	46,788	0
Mundra	468,663	0
Mangalore	23,193	111,349
Buj buj	89,091	0
Vizag	489,583	90,626
Dahej	388,705	0
Sikka	42,320	329,028
Tuticorin	0	22,388
Cochin	91,401	162,923
Paradip	0	200,856
Goa	10,000	129,301
Ranpar	80,475	0
Ennore	107,868	0
Karwar	4,816	0
Grand Total	7,207,383	3,305,862

has remained below 60%, which is very low compared to international standards.

Chemical exports

India also exports a large variety of chemicals, acids and oils. The commodities exported the most are: benzene (from Jamnagar and Haldia), paraxylene and orthoxylene (from Jamnagar), mixed xylene (from Mangalore), castor oil (from Kandla), molasses (from Karwar, Chennai and JNPT), sulphuric acid (from Tuticorin), phosphoric acid (from Tuticorin and Dahej), ethyl acetate (from Mundra and Mumbai), methanol (from Kandla and Mumbai), methyl tert-butyl ether (from Kandla and Mundra) and pygas (from Haldia). The table below shows exports for each port during 2013.

Chemical Exports in 2013		
Port	Cargo	Quantity (MT)
Sikka	PX, OX and BZ	1,164,605
Kandla	Castor oil and others	213,282
Mundra	SBO, Ethanol and others	213,282
Tuticorin	Sulphuric and Phosphoric acid	161,944
Mangalore	Mixed xylene	133,339
Karwar	Molasses	114,510
Haldia	Benzene, Pygas and Methanol	107,726
Chennai	Molasses, Palmolein	82,786
Mumbai	Ethyl acetate and Others	80,048
JNPT	Molasses	61,600
Hazira	Soybean oil	21,000
Kakinada	Molasses and Methyl ester	20,550
Dahej	Sulphuric acid	18,000
Cochin	Benzene	9,000
Vizag	Bio - Diesel	7,300
Total		2,371,553

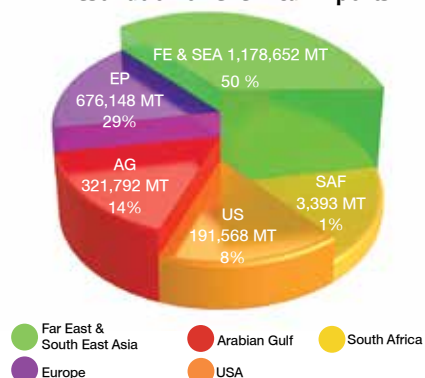
Chemical Clusters in India	
States	Share of Production
Gujarat	53%
Maharashtra	9%
Madhya Pradesh	5%
Uttar Pradesh	6%
Tamil Nadu	6%
Punjab	4%
Others	17%

Indian Oil, Gas Authority of India Ltd. (GAIL) and Haldia Petrochemicals Ltd. Acids are usually imported for the production of fertilisers, soaps and detergents and for metal treatment plants. Phosphoric acid is the most commonly imported acid because of its use as an intermediate for making diammonium phosphate and this reduces the use of rock phosphate as raw material. Another reason for importing phosphoric acid is more or less the stationary level of production indigenously. The capacity utilization of the Indian phosphoric acid industry

Imports of Chemicals and Lubes, and Phosphoric Acid for each Indian Port (Jan to Dec 2013)		
Port	Chemicals and Lubes	Phosphoric Acid
Kandla	1,747,430	1,132,515
Haldia	920,130	331,561
Mumbai	2,120,327	0
Kakinada	68,355	680,429
JNPT	508,238	114,886

Agency & Services

Destination of Chemical Exports



Major coastal movement trends: chemicals and acids

The current coastal movement of various commodities (chemicals and acids) in India is as given below.

Commodity	Loading Port	Port of Discharge
Caustic soda	Dahej, Tuticorin, Vadinar	Vizag, Kakinada
Sulphuric acid	Dahej, Tuticorin,	Kochi, Kakinada, Paradip, Vizag
Phosphoric acid	Tuticorin, Paradip	Kakinada / Kandla / Vizag / Budge Budge
Orthoxylene	Sikka	Chennai
Paraxylene	Sikka, Haldia	Hazira, Dahej, JNPT, Jamnagar/Vizag

CHALLENGES FOR THE INDUSTRY

The main constraints and challenges of the chemical industry are listed below.

High prices of basic feedstock: The Indian chemical industry either uses natural gas or crude oil as feedstock for manufacturing and this constitutes 30-60% of production costs. The fluctuations in oil prices therefore affect the growth projections of the firms.

SSI reservation and the fragmented nature of the chemical industry: The industry has many small units spread throughout various parts of the Country. Hence, it is not able to achieve economies of scale, putting it at a disadvantage when seeking large-volume export orders.

Low use of IT: The penetration of IT in the local chemical industry is relatively low. IT is required in equipment design chemical engineering and process simulation, which help in reducing product and process development time. Its application also aids in

research and development (R & D).

Low level of brand development: Indian chemical producers, barring a few large ones, prefer to sell their products as generic products without brand recognition.

Low level of common infrastructure: Like all other industries, the chemical and petrochemical industry also requires certain basic infrastructure both in the process chain and in the supply chain. At present, most units have their own specialised facilities causing duplication of effort and investment. Vertical integration of the common infrastructure for chemical units clustered in close proximity can lead to significant cost reduction.

Environmental regulations: Compliance with occupational safety and health, safety management and environmental safety regulations can be achieved more easily by a plant manufacturing a large volume of a single chemical, while it may not always be feasible for plants producing multiple chemicals in low volumes.

Dumping and import competition: The chemical industry has attracted the second highest number of anti-dumping actions throughout the world. The picture is same here and about 35-40% of the anti-dumping cases initiated by India are related to chemicals and petrochemicals.

STRATEGIES FOR THE FUTURE

The increasing trend for the specialisation of chemical products globally and the focus on innovation as a core competence are generally encouraging for companies aspiring to become leading players for specialty products. Possible strategies for the industry in this climate are summarised below.

Strengthening technological competence: Investing in Research & Development would enable cost reductions and specialised product development.

Improving basic management capabilities:

The industry should implement good manufacturing practices, good laboratory practices, TQM, total production management and risk management.

The environment: Adhering to environmental norms should start from the design of production processes to end use and final disposal (hazardous waste). The industry should address developmental issues such as sustainable chemistry, adherence to safety and health regulations, and risk management.

Increase use of IT: This can improve the entire process cycle from technology, engineering and procurement to manufacturing by integrating these with business processes, resulting in higher efficiencies.

Consolidation: This would help to reduce the costs of procurement and production by achieving economies of scale.

Marketing and promotion: The Indian chemical industry needs to concentrate more on brand building, market development and export promotion.

Creation of a modernisation fund: A modernisation fund on the lines of the technology upgrade fund established for the textile sector would strengthen the technological competence of the Indian chemical industry.

The performance of the chemical industry in the days to come is likely to depend upon and determine the trends in the overall Indian economy, as it also engineers links with the rest of the world in terms of international trade, investment flows and technology transfers.

J. M. Baxi & Co. has been associated with the shipowners, charterers and other stakeholders in the supply chain of the Indian chemical industry for many decades. In 2013-14 we were proud to handle vessels exporting and importing over 3.37 million tonnes of chemicals and acids ■

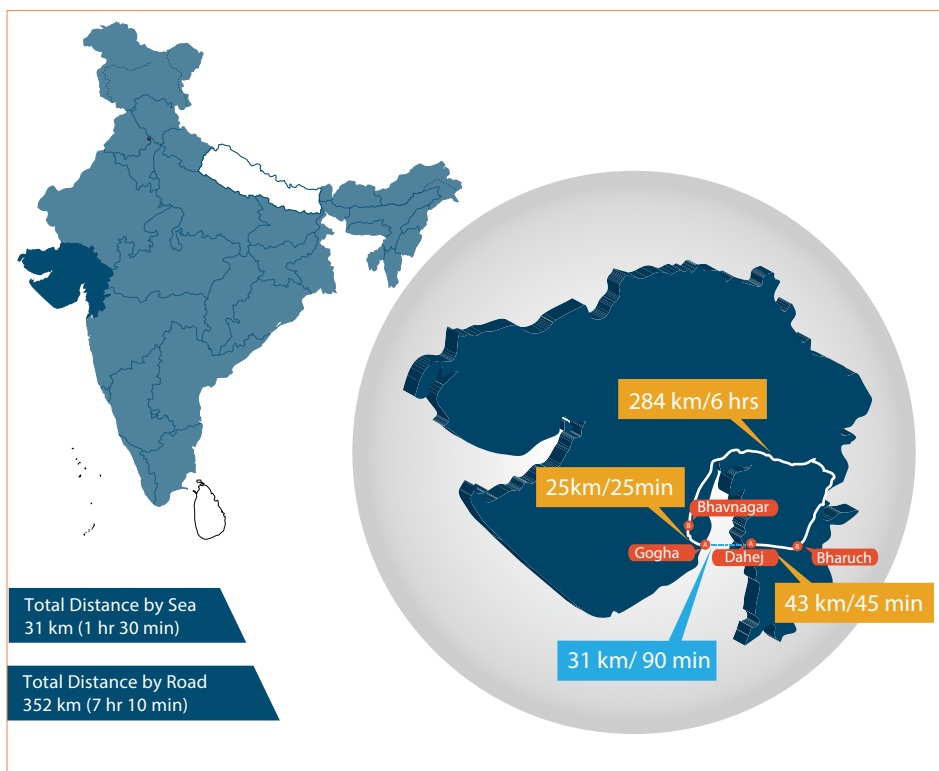
Agency & Services

RO - PAX Ferry Between GOGHA And DAHEJ

The Gujarat Maritime Board (GMB) has embarked on an ambitious and much awaited project for a proposed ferry service linking Gogha, which lies to the south of Bhavnagar, to Dahej across the Gulf of Khambhat (Cambay) in the state of Gujarat on the west coast of India. This proposal was mooted several years ago by GMB and has been shelved a number of times due to various issues. The importance of this project has been realized once again due to the rapid development and industrialization of Gujarat state and accordingly a global tender has been issued by GMB to elicit worldwide response for this project.

The state of Gujarat with a population of around 50 million is considered to be among the top three industrialized states in India. The coastline of Gujarat is the longest of the nine maritime Indian states and has two gulfs, the Gulf of Khambhat and the Gulf of Kutch. Due to the state's unique location and maritime heritage, Gujarat has three major oil refineries with a capacity of almost 100 million tonnes. Besides being the largest textile centre in India, Gujarat also boasts large engineering companies such as Larsen & Toubro, Hitachi, Toshiba, which have set up substantial engineering goods production facilities. The largest ship-breaking yard is at Alang close to Bhavnagar and international automobile manufacturers like General Motors and Suzuki have set up plants in the state, along with Tata Motors.

As the map shows, the proposed ferry service will connect one part of Gujarat to another, thereby facilitating a considerable saving of time and fuel compared to the present road journey. The distance



between Gogha and Dahej is 17 nautical miles (31 km) by sea. If the same distance were traversed by land, the distance would be 352km! The time taken by the ferry would be 90 minutes whereas the same distance by road would take over 7 hours. The benefits of the ferry service are tremendous and its introduction will be favourably received by the local population and tourists as well as by the commercial traffic operating in this area.

GMB is arranging the infrastructure that will be needed to operate the ferry at both Gogha and Dahej including the jetty, terminal buildings, open shed, parking area, internal roads, bunkering facilities and power supply. The proposed ferry will have a passenger capacity of 500 and space for 150 vehicles. It will operate round the clock throughout the year with daily potential for 4,000 passengers

and 1,200 vehicles on the basis of four round trips per day. Of the 1,200 vehicles expected daily, it is estimated that 60% will be trucks, 10% buses and 30% cars.

As per the GMB bid proposal, the ferry must be suitable for carrying passengers and commercial vehicles with a stern ramp and having a maximum draft of 4.5 mtrs. GMB will also undertake capital dredging for the project at both ports and maintenance dredging 3 to 4 times a year to maintain a depth of 5 mtrs at all states of the tide.

The local population has expressed its keen interest in this project and is awaiting its introduction. With the project finally taking shape, GMB is proposing to introduce another ferry service across the Gulf of Kutch for which tenders are expected to be floated later this year ■

In Conversation

Rivera Europe To Carve A Market Niche In India



(L - R) Mr Rajnish Khandelwal - Head, B Liquid; Mr Vir Kotak - Director, J M BAXI GROUP; Mr Yves Constantinidis - Export Manager, Rivera Europe; Mr Rajesh Israni - General Manager, B Liquid; Mr Diwik Singh



Mr Yves Constantinidis handing over 1906 Red Vintage to Mr Vir Kotak

B Liquid is the beverage division of the J M BAXI GROUP. It was set-up in 2010 with an endeavor to bring the world's finest beers to India. It has been associated with Rivera Trading Group and has been actively involved in sales and marketing two of their most admired brands Estrella Galicia and 1906 Reserva Especial since 2012. B Liquid has placed Estrella Galicia and 1906 Reserva Especial in over 150 outlets in 5 cities.

Rivera Europe is part of the Hijos de Rivera S.A. group, a company with more than 100 years' experience in the beverage sector, which has grown extensively in recent years and operates in a wide range of beers to ciders to mineral water.

During its short trajectory, Rivera Europe has become directly involved in the United States, China, the Philippines and Japan, developing a business model that focuses on the specific needs of each of these markets. Also, its extensive portfolio of products and formats is distributed in more than 35 countries throughout the world. Recognized brands such as Estrella Galicia or 1906 Reserva Especial beers, Cabreiroá mineral water or Maeloc cider are just some of the products that Rivera Europe offers the global market.

Mr Yves Constantinidis who is the export manager of Rivera Europe on his visit to India in April 2014 had a fruitful conversation on way forward with the Director Mr Vir Kotak, J M BAXI GROUP and also discussed other opportunities for portfolio expansion.

During his visit to India, he started with Mumbai on the 11th April, where the team took him through an overall detailed presentation about the company and the beer market scenario in India. Later he was guided for a market visit covering different categories of outlet selling premium and imported beer portfolio and interaction with the owners and opinion leaders.

There was also a media conversation arranged for, with eminent beverage journalist Bhisham Mansukhani and Karina Aggarwal.

Mr Yves also conducted a beer appreciation session for the bar and wait staff of Irish House, Kalaghodha and The Beer Cafe Biggie, Connaught Place which had about 25 participants attending per session ■

BLIQUID



Logistics

Fertiliser Handling At GAVHAN Yard

Fertiliser is an organic (manure, compost, guano, etc.) or inorganic (urea, MOP, DAP, NPK, etc.) material of natural or synthetic origin that is added to soil to supply and replenish essential nutrients needed for the growth of plants. Conservative estimates report that up to 50% of crop yields today can be attributed in some way to natural or synthetic commercial fertiliser.



In India, the introduction of high yielding crop varieties, intensive cropping buoyed by the green revolution in the 1960s and 1970s, which aimed to increase crop production, coupled with growing foreign and domestic consumer expectations for quality fruits and vegetables, led to heavy soil nutrient depletion. At the same time, the heavy take - up of essential plant nutrients through bumper harvests caused soil nutrient fatigue. The deficiencies in micronutrients became a serious obstacle to achieving optimum yields which required better nutrition management, thereby creating an increasing demand for specialty fertilisers.

Specialty or micronutrient fertilisers are specially manufactured to plug this gap and are required by high quality cash crops, high yielding crop varieties, drip irrigation and intensive crop production. These micronutrient fertilisers come in various forms viz.



water soluble fertilisers, secondary nutrients, bio-fertilisers and similar products that require special care while handling.

Boxco Logistics in its continuous endeavour to seek new challenges forms a vital link in the supply chain for a range of micronutrient fertiliser products available across India. We have created a one of a kind micronutrient handling facility at our Gavhan Fertiliser Yard in Panvel Taluka, District Raigadh.

We currently have a total covered storage space of approximately 35,000 sq.ft at the yard. The operations being carried out include handling, storing, re-conversion, re-packing, stitching and printing of pouches and bags of micronutrient fertilisers for distribution to various markets all over India.

The cargo arrives in containers in packing sizes of 8.5kg, 9kg, 25kg, 50 kg, 1,000 kg, 1,250kg or in bulk form. The containers are de-stuffed and the empty containers are returned. The cargo is subsequently stored, bulked (if required), weighed, re-packed, stitched and sealed in various packing sizes that range from pouches as small as 100gms all the way to 50kg bags.

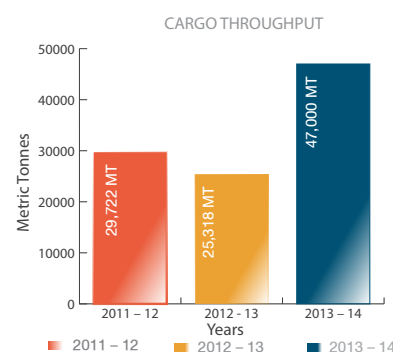
Pouches from 100g to 1kg are packed by a special machine capable of

handling and packing 12 metric tonnes of cargo in a single shift. The machine also offers customised batch printing on the bags as per the requirements of different clients. The packing of bags from 5kg to 50kg is done manually and output varies as per the requirements of the clients and their dispatch instructions.

We oversee and execute operations that are exceedingly complex. Every day, cargo operations require 14 to 15 different and distinctive varieties and types of micronutrient fertilisers that need to be packed into 9 to 10 different pouch and bag sizes and subsequently dispatched to wholesale and retail markets as far away as Srinagar in the north, Malda, W.B., in the east and Hyderabad in the south.

To give a focused thrust to marketing and operations at our Gavhan Yard, a dedicated team oversees the operations at the yard and keeps clients updated with comprehensive daily MIS reports.

Our efforts have borne fruits in that we have retained old clients and consistently added new clients to our fold, who, impressed with our services, have been increasing cargo throughput every year.



We are breaking new ground and expanding in a bid to cater to ever increasing demand from the market ■

Logistics

BOXCO Logistics Charters Heavy-Lift Aircraft For WELSPUN

In a first of its kind service offering, the International Freight Forwarding (IFF) team at Boxco Logistics has chartered three long-haul trip charters on behalf of Welspun Trading – two of them to Amsterdam and one to Milan from India for transporting steel pipes to European buyer sites on an airport-to-door basis. J M BAXI's GROUP company M/s N. Jamnadas & Co was indeed, among one of India's first-ever IATA-approved air freight forwarders but the baton has since passed to Boxco Logistics, which has taken on multi-modal project cargo and other odd-dimension cargo (ODC) movements as its specialist vertical business domain within the group.

KEY PROJECT HIGHLIGHTS

THE CLIENT

Welspun Group is a US\$ 3.5 billion conglomerate, among one of India's fastest growing groups, which has registered a CAGR of 30% over the last decade. A fully integrated player within the pipes, plates and coils and home textiles sectors, the Group has presence in verticals such as steel, infrastructure and energy.

DELIVERY STATUS	HAULAGE	SCHEDULE	AIRCRAFT	PAYLOAD (No of packages)	WEIGHT (KGS)
Received cargo on 04.03.2014	MUMBAI- MILAN	Dept. 2220 hrs / 05.03.2014	Charter B747 400F	16	72,173
Received cargo on 14.03.2014	MUMBAI- AMSTERDAM	Dept. 0100 hrs / 15.03.2014	Charter B747 400F	16	68,544
Received cargo on 15.03.2014	MUMBAI- AMSTERDAM	Dept. 1210 hrs / 16.03.2014	Charter B747 400F	16	68,778

THE ASSIGNMENT

Welspun wanted to deliver to the door at two different locations in Europe, a combined volume of 227 metric tonnes of steel pipes by scheduling three heavy airlift movement of 75 metric tonnes payload. The challenging assignment required monitoring at the highest level. The assignment was a delivered duty paid (DDP) contract.

TIMELY EXECUTION

BOXCO's responsibility was to deliver the consignment to the consignee's door to a strictly agreed timeline, and hence co-ordination of operations as per the fixed scheduled timing was of extreme importance. The pipes on the Milan flight were to be delivered to Milan city; whereas the pipes on the Amsterdam flight were to be delivered to Paris. The Boxco Logistics team successfully ensured that both ends were covered. As

Welspun had no prior experience of air charters before, it was also a case of close client interaction and co-ordination. The Welspun team was also present along with ours to ensure that this was achieved without any hassle. The pipes were shipped on Boeing 747 nose-opening aircraft, which were chartered from Etihad Airways.

All deliveries were executed as per the client's expectations. Members of the Welspun Shipping and Chartering team appreciated the efforts put in by Boxco Logistics for this shipment. The handling of the shipment and the experience have opened up many opportunities for Boxco Logistics in the air freight market space. Airlines and air charter operators are now looking at Boxco Logistics as a serious player in this segment. In addition, this experience has instilled a lot of confidence in the air freight operations team ■



Logistics

BOXCO Successfully Delivered India's Heaviest Stator To Date For TOSHIBA



It was extremely critical and challenging job for Toshiba to transport a heavy concentrated load such as this stator having dimensions L 10.5 m x W 6.4 m x H 4.6 m and a weight 420 MT to Kudgi, Bijapur, for NTPC's 3 x 800 MW Power Project. This was because Kudgi, located in Bijapur district of Karnataka state, has ghats on its west and south and the Krishna and Godavari rivers surround it on all sides, together creating barriers, which were extremely difficult to traverse. To add to this, this was the heaviest stator ever to be transported in India.

Upon receiving this requirement from Toshiba, the heavy-lift experts of Boxco Logistics swung into action to find an optimum solution. As part of this exercise, the civil engineering and heavy-lift teams collaborated to work out the

complete transportation scheme, which consisted of a barge stowage plan, a trailer loading plan and the best route option.

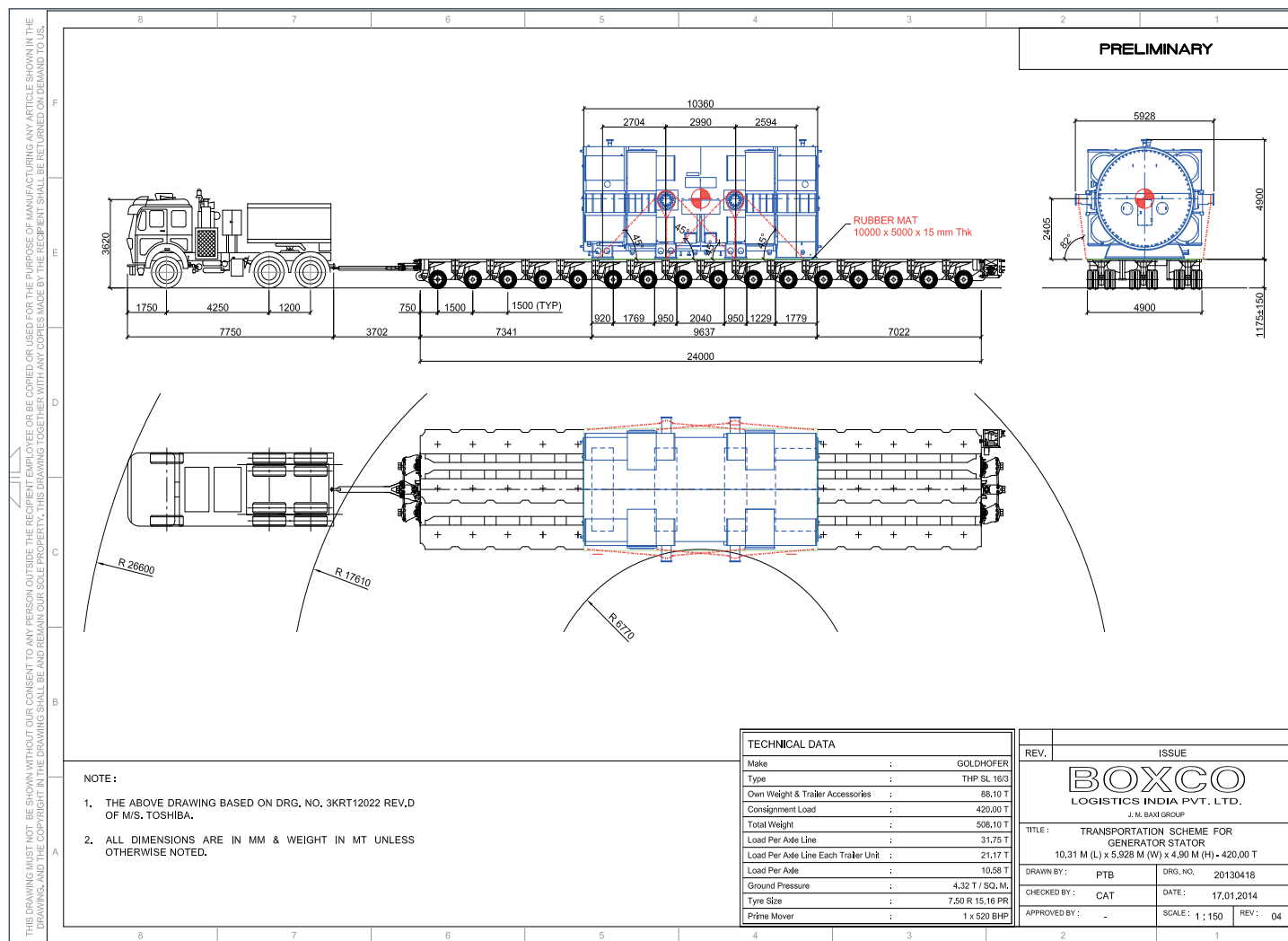
The first step in finalizing the transportation scheme was the route, the most critical component of the entire scheme of things. Hence, Boxco Logistics deputed its most experienced supervisor and civil engineer to finalize the best route. They travelled on all routes from all the possible gateway ports such as Mumbai, Nhava Sheva, Jaigarh, Chennai and Karwar. After completing the inspection of all the routes, a bridge analysis was carried out using STAADPRO software to ascertain the bridge strengthening capacity. The routes from all the above ports were carefully examined for their techno-commercial feasibility and a matrix was formulated comparing each

route option on various parameters. This comparison threw up surprising results as the established ports of Mumbai/Chennai lost out to a fisherman's jetty in Karwar, Karnataka. Karwar is pre-dominantly an anchorage port used for the shipping of bulk cargo and handling/transporting project cargo at Karwar was a very rare occurrence.

Once the route and the gateway port were finalized, our technical team finalized the following:

- Transportation schemes on barge.
- Transportation scheme on the trailer.
- Trans-shipment methodology without using a crane.
- Number, location and type of civil works required at various points on the route.

Logistics



The plan was frozen 30 days prior to the arrival of the ship with the stator at Mumbai port and was sent to Toshiba for approval from their very experienced logistics team. The Toshiba logistics team added some further measures, which were incorporated by us in the method statement that became the basis for our actual resource deployment for manpower and equipment.

Post finalization of the method statement, resources such as a barge and tugs were arranged. The formalities for construction of by-passes were initiated as more than 10 by-passes needed to be constructed. A separate team was formed to facilitate and co-ordinate this right from Belekeri jetty to the Kudgi Project site.

On 5th January, 2014 the stator safely arrived at Mumbai port, and was subsequently shifted onto our barge with detailed consultation with the shipping company. After which it was transported to Belekeri jetty with utmost care taken for lashing and securing to make the shipment absolutely safe.

On reaching Belekeri jetty, the barge was aligned to the jetty and a floating RORO operation was carried out with ballasting-deballasting, all governed by detailed calculations carried out by our marine team. The RORO operation was carried out using SPMTs. Further, the initial ghat section near Belekeri called the Yellapur Ghat Section was crossed using SPMTs, which helped in negotiating sharp turnings and upward gradients.

After the crossing the stator was shifted to stools and beams using jacking and was subsequently shifted onto a conventional axle line. We made a special effort for the civil works, so that the stator was smoothly transported without having to wait at any place.

With a combination of careful technical planning, meticulous execution and hard-core onfield expertise, Boxco Logistics delivered the stator on 25th March, 2014 which was 7 days before the target date set by Toshiba ■

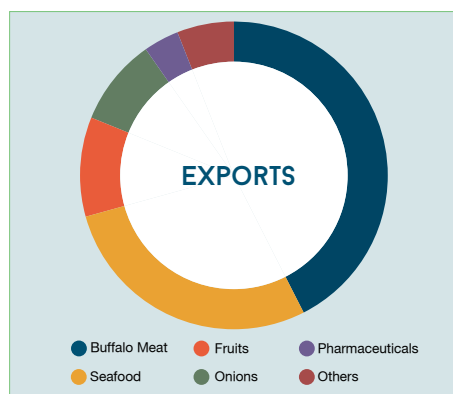
Infrastructure

ULA CFS: The Preferred Destination For Reefer Containers At NHAVA SHEVA

The Indian reefer market has witnessed a growth of 7-8% CAGR over the last few years. While Indian demand for international ready-to-eat foods, chocolates and exotic fruits has increased, our seafood, meat, poultry, pharmaceuticals and finished goods have also found better acceptance in the international markets, spurring growth and consistency in volumes.

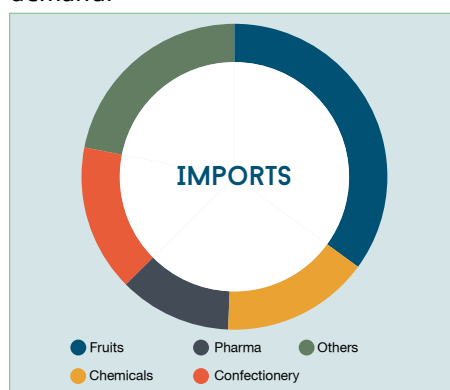
India trails only Brazil in exports of beef, with a 20% market share, worth \$3.2 billion in 2012-13. The robust demand for cheap, lean Indian halal meat has led to this increase from \$1.9 billion in 2010-11.

Marine exports continue to show robust growth with 9,83,756 MT exported during 2013-14. Port Pipavav handled the highest volume with 25% of market share, and in terms of value, Vizag port claimed the numero uno position overtaking Kochi port with revenue earnings of \$1.13 billion. South-East Asia, US, EU and Japan continued to be the top destinations.



Fresh fruits and vegetables dominate imports. The market size was close to 0.7 million MT in 2012-13 with a value of \$580 million. Moreover, 70% of the

market share was dates and apples. Dairy products, confectionery, chemicals and pharmaceuticals have also witnessed a steady rise in demand.



The market share of refrigerated exports and imports is as shown.

JNPT's Share of the Overall Market

West coast ports handle nearly 80% of the total reefer traffic, of which JNPT has a dominant share. Traditionally, Gateway Mumbai has served the markets of north and central India along with the local hinterland. The following ecosystem here has evolved with time, making it the largest marketplace for the Indian reefer business.

- Infrastructure** Container terminals, container freight stations, empty depots, cold storages, reefer distribution vehicles, etc.
- Services** Reefer container repairs, cleaning, container surveys, packing and labelling, sorting, waste disposal services, IMDG handling, customs, FSSAI, banking services, etc.

- Trade** Buyers, sellers, traders, retail distributors, shipping lines, etc. have well developed business catering to the needs of the industry.

Product Mix

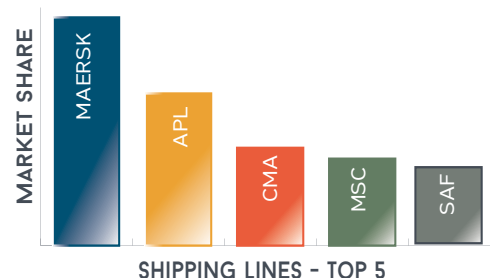
- Imports** - Major reefer cargoes imported at Nhava Sheva are fruits and vegetables, confectionery, seafood and meat, chemicals and pharmaceuticals.
- Exports** - The main commodities exported are buffalo meat, seafoods, fruits, onions, pharmaceuticals, poultry, leather products, etc.

Top Trading Countries

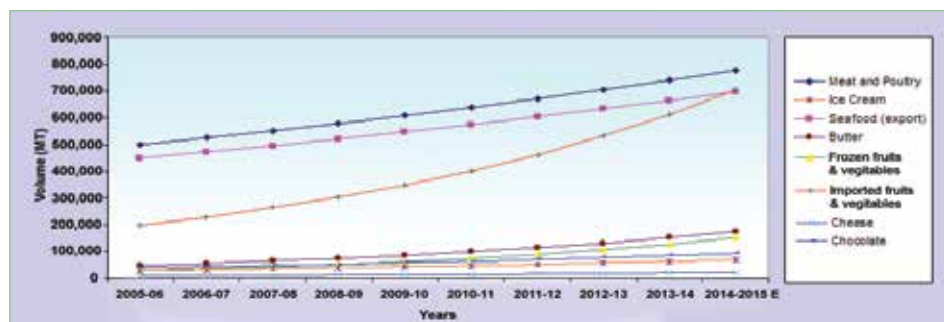
- Importing Countries** - USA, China, Singapore, Belgium, South Korea, Netherlands and UAE.
- Exporting Countries** - Netherlands, UAE, Vietnam, Singapore, Malaysia and Saudi Arabia.

Top Carriers

In recent years, more and more refrigerated products have been transported in containers. Although the list is extensive, the top five carriers are:



Infrastructure



Reefer Traffic Growth At ULA CFS



ULA – Container Freight Station

ULA CFS, a division of United Liner Agencies of India Pvt Ltd, was commissioned on 20th March, 2003 with a total area of 20,000 sq mtrs. An additional area of 30,000 sq mtrs (Phase II) was commissioned on 16th February, 2006.

ULA CFS is situated at Dronagiri Node and is 60kms away from Mumbai City and 12kms from Jawaharlal Nehru Port Trust, Nhava Sheva by road.

Mission Reefers

It is evident from the graph above that over the years there has been a sound growth in the imports of major food products.

Nhava Sheva handles approximately 2,500 reefer TEUs per month. ULA CFS caters only to a niche percentage of the business at Nhava Sheva, leaving a huge untapped potential of the total reefer market transiting the Gateway Port.

The marketing team at ULA CFS has initiated a new campaign called Mission Reefers. A simple three-facet programme has resulted in an excellent trade response. It consists of: (a) infrastructure, enhancement (b) tailored reefer-centric services and (c) reaching out to CHAs and freight forwarders with a comprehensive package.

There has been a steady rise in the number of reefer containers at ULA CFS (as shown in the graph above), which is a true reflection of this concerted effort.

The Services Bundle

- Fast track evacuation from the port container yard
- Priority movement to CFS
- Instant plug-in and quality monitoring services
- Assistance with customs and FSSAI officials
- Customer information sharing programme
- Web-based tracking system
- Transfer of de-stuffed box to empty depot
- Washing, repairs, run test and PTI all under the same roof
- Quick turnaround of empty boxes with export readiness.

- SERVICE HIGHLIGHTS**
- 01 • Total CFS area : 50,000 sq mtrs
• Yard capacity : 3,000 TEUs
 - 02 • 24 x 7 reefer monitoring
• Dedicated reefer yard
 - 03 • Ample reefer points
 - 04 • Container tracking system
• E-Proforma facilities with online payment for import containers
 - 05 • Touchscreen system connected to customs EDI for container and cargo queries
 - 06 • Haz-Mat co-ordinator to monitor dangerous goods
 - 07 • 24 x 7 customer service and free Wi-Fi facility
• Independent empty container handling facility
 - 08 • Chassis stuffing and de-stuffing
• CCTV surveillance
 - 09 • Franking and stamp duty payment facility
• Import bond facility
 - 10 • PTI and run test
• Customs EDI centre with MPLS connectivity
 - 11 • Cleaning and washing of reefer containers
 - 12 • Reefer container body repairs
• Reefer container machinery repairs

Future Focus

- With the expected growth in reefer traffic, additional reefer plug points are being installed. To ensure continuous power, plans are in progress to purchase a new set, augmenting the capacity of the existing two DG sets.
- Regular co-ordination meetings with the Food Safety and Standards Authority of India (FSSAI), which tests edible items arriving in reefer containers.
- Trained and dedicated team to monitor reefers and help consignees with faster evacuation of reefer containers.
- Additional stacking capacity of 2,000 TEUs is being planned, which will improve service levels and turnaround time.
- Owned trailers for moving reefer containers resulting in faster evacuation from container terminals to reduce turnaround time.
- Installation of a new weighbridge to ease customs' clearance.

With the advantage of the right location, state-of-the-art infrastructure as well as focused services, ULA CFS has positioned itself as the new destination for reefers ■

Infrastructure

TSC Service Starts At VIZAG

MV Izumo in VCT on her first call
on 21 May



The Thailand Straits Chennai (TSC) service was recently introduced with the maiden call of the vessel MV Sinar Tanjung at Visakha Container Terminal (VCT) on 7 May 2014. The service is operated by a consortium of X-Press Feeders with two vessels and NYK Line with one vessel. With a fixed window at VCT one of these vessels will call here every Tuesday and sail to Penang-Port Kelang-Singapore-Laem Chabang-Chennai before returning to Vizag. The new service will cater to the burgeoning import and export trade directly between the Vizag hinterland and South East Asia, while providing global connectivity via Singapore. The three vessels have completed one call each during the month; the MV L Amanda V.82W called on 13 May and M.V. IZUMO V.122E sailed on 21 May. The three vessels, which have a capacity of about 1,500 TEUs, had a

port stay of less than 10 hours. For the first vessel, MV Sinar Tanjung, the arrival of a train loaded with containers bound for South America was synchronised with the ship's arrival. The train arrived at 1400hrs and containers were picked up from the train, directly transported to shipside and loaded onto the vessel within 4 hours. To commemorate the maiden call, a small function was arranged on board where Sushil Mulchandani, COO, VCT and Mr Bobby Lawrence, Branch Head of Merchant Shipping P Ltd., agents for the carrier X-Press Feeder, presented a silver salver to the Master of the ship Capt. Pankaj Verma.

The vessel MV Izumo is operated by NYK Line. NYK Line has had a presence in Visakhapatnam for over a decade, and was already among the top ten carriers at the terminal. The deployment of its own tonnage

heralds an enhancement of its presence at its location. Capt. Parmeet Bawa, AGM All India Operations, NYK Line (I) Ltd. Mumbai, was at Vizag to greet the vessel MV Izumo on her arrival at Vizag for the first time. On berthing of the vessel at 2230hrs, Capt. Bawa, along with Anil Narayanan - VP Operations, and Kalyan Chakravarthy - GM Business Development of VCT boarded the vessel and greeted the Master, Capt. Shailendra Rawat. The terminal presented him with a silver salver to commemorate the occasion.

X-Press Feeders, in its earlier avatar as Xpress Container Line, was the first feeder operator to serve Vizag in 1990. Neither the operator nor Capt. J S Gill, MD, X-Press Feeders India Agency, is unfamiliar with the terminal. Capt. Gill has expressed confidence that TSC will achieve exemplary growth ■



Capt. Verma (right) of the MV Sinar Tanjung receiving the salver from Mr Mulchandani. Mr Bobby Lawrence is next to Mr Mulchandani



The Captain of MV Sinar Tanjung (third from left) flanked by Mr Bobby Lawrence of Samsara Shipping and Mr Sushil Mulchandani of VCTPL and others from both organisations.



Capt. Shailendra Rawat (on the right) of MV Izumo accepting the salver presented by Mr Anil Narayan, VP Operations, VCT, with Capt. Parmeet Bawa in the background. Mr Kalyan Chakravarthy, GM BDC is on the left

We Connect

'WOW' At VCT

Dustbins



Spill Kit



Barriers

Portable
Extension
GangwayTruck
Positioning
System

Recycling today is clearly one of the most important and viable ways to combat the challenges of resource depletion. Source segregation of recyclables reduces the load on natural resources, provides cost-effective raw material for industry, improves health and hygiene and creates clean and green surroundings.

As a responsible corporate entity, committed to positive environmental action, Visakha Container Terminal (VCT) has initiated - 'WOW' or 'Wealth Out of Waste' - a project that aims to inculcate the habit of recycling unused materials and scrap items for productive purposes.

During the financial year 2013-14, the operations department of VCT undertook various initiatives to create wealth out of waste. In an endeavour for continual process improvement, good use was made of scrapped material and innovative resources were designed and developed. The various ideas and thought processes of individuals and the team in developing this wealth out of waste were collated.

Metal garbage bins were made from old and unused oil drums. Colour coding and stencilling were used to segregate the garbage. The process was thereafter emulated in the entire terminal and many similarly colour-

coded, stencilled bins were strategically located across the terminal for collecting garbage.

Mild Steel pipes and iron mesh, meant for scrap disposal, were used to fabricate a portable extension gangway. As a vessel's gangway cannot be rested on the wharf due to the frequent movement of quay cranes, this portable extension gangway is utilized to provide safe access to the vessel's gangway.

Barriers were made out of old unused ITV tyres, which were to be scrapped. These tyres were cut in half and painted in yellow and black stripes. They were then used as barriers at the end of container yards to demarcate trailer movement. The painting work was done by the terminal staff during a no-vessel day. They demonstrated great team spirit and enthusiasm.

Scrapped aluminium poles and square pipes were used to design an in-house truck-positioning system (TPS) to align ITVs below quay cranes. This enables ITV drivers to position the trailers correctly under the spreader below a quay crane. This has led to the total elimination of tally clerks and lashers working under quay cranes. This is a very cheap, simple and workable solution to avoid the man-machine interface compared to hi-tech and

expensive solutions available to resolve similar issue.

Old and obsolete documents from the department were shredded and then recycled through an authorized vendor.

The conventional berthing flag made of cloth has been replaced with metal. The new berthing flag, which is placed on the wharf to indicate a ship's position, has been made out of scrap metal thus enhancing its longevity. Arrangements are also being made for a berthing lamp along with reflective stickers for better visibility during night operations.

Safe zone boards have been made out of scrap metal plates and are fixed onto new quay cranes to indicate the safety zone for personnel while the crane is in operation.

Unused wooden planks lying in the terminal premises were used to fabricate a mobile oil spill kit. The spill kit has wheels attached to it and is equipped with items like sand, gloves, cotton waste, equipment for handling spills etc. and can be easily mobilized during an emergency.

The team showed innovation and effective planning skills in converting waste to wealth, and also helped to reduce the problem of waste disposal ■

In Focus

Dredging: The Indian Scenario

continued from Issue V

India presently has about 14500km of inland waterways that are navigable; of this length, about 4382km comes under the five national waterways (NWs). The waterways are administered and maintained by the Inland Waterway Authority of India (IWAI) and so far they have undertaken only maintenance dredging projects. IWAI has a fleet of 20 dredgers for this purpose, but the challenges involved are enormous. The requirement for dredging in the NWs according to the Detailed Project Report (DPRs) commissioned by IWAI is shown in the table I.

Table – I (Requirement of Dredging in NWs)

No.	National Waterway No	Dredging Requirement (million m ³)	
		Maintenance	Capital
NW1	(Ganges, WB/Bihar/UP)	1.00	-
NW2	(Brahmaputra, Assam)	0.50	-
NW3	(WC Canal, Kerala)	-	4.00
NW4	(KKD+ 2 canals, AP/TN)	-	20.00
NW5	(EC Canal, WB/ORS)	-	55.00

VARIOUS ASPECTS OF DREDGING AND THE CHALLENGES

Dredging in India faces a number of challenges related to planning, execution, regulatory framework, technology, infrastructure and manpower. The work, which is already in arrears, keeps getting delayed, reportedly due to the complex environmental and clearance procedure that requires each project to be approved by a number of state and central level authorities separately instead of a single central agency.

It is obvious that in order to plan, estimate and execute a dredging project, it is necessary to investigate comprehensively the location and its physical characteristics and the quantities and physical properties of the materials to be dredged. A careful **marine geotechnical investigation** is thus essential. Analysis of historical data for the depth of water, speed of water flow, hydrological and weather conditions (particularly for the monsoon periods) backed up by field studies is needed. Laboratory tests, like the compressive strength test, density and porosity test, hardness and abrasiveness test and tests for particle size, moisture content, shear strength and cohesion, are also important. The results are then applied to select the type of dredging equipment required, to identify a plan for the disposal of dredge spoil, and to estimate dredging production rates, project time lines, risks and costs.

The **dredging of inland waterways** involves a separate set of issues. These are specific to the particular waterway. For alluvial rivers like the Ganges and Brahmaputra (NW1 and NW 2), there are issues like seasonal fluctuations in available depth, major sedimentation leading to longer idle time for dredgers, which increases project costs, river currents, ever changing siltation patterns, bends and bores and the river banks over-congested with inhabitation, which restrict disposal. The West Coast Canal system (NW3) does not have seasonal fluctuations, but there are other challenges like narrow and shallow channels, lack of space for disposal of dredged material,

dredging of hard strata, and ongoing fishing activities in the channel.

Contractual practice (including risks) is the next major dimension and challenge in dredging. It is obvious that because of the unique nature of the influence of natural conditions, risks and multiple activities involved, dredging contracts must always be designed to clearly and transparently demarcate and record the roles and responsibilities of the two parties, the employer and the contractor.

Currently, there are two types of contracts prevalent in India known as **cost-plus** and **fixed-price** contracts. In a cost-plus contract all costs that are reasonable, allowable and allocable are reimbursed by the employer. In the fixed – price model, a fixed amount has to be paid by the employer for the specified services. A comparison of the two models is shown in the table II.

Table – II Comparison of Fixed-Price and Cost-Plus Contracts

PARAMETERS	FIXED – PRICE	COST - PLUS
Risk Borne by	Contractor	Employer
Payment	After evaluation	Cost paid on monthly basis or as incurred
Administration Burden	Low burden on employer; minimal supervision	High burden on employer; more supervision

The **service delivery** commitment is a serious issue in a dredging contract. Contracts stipulating a guaranteed depth may not always be feasible because most of the contracts lack clearly defined responsibilities and risks for the parties involved. Geotechnical investigations are neglected or pruned down and geotechnical details and restrictions

In Focus

are not included in contracts, which mean that requirements are incorrectly estimated. Disposal planning is another area that is given insufficient attention. Some dredging contracts have been reportedly awarded even without obtaining prior environmental and statutory approvals and clearances, which complicates the situation further. Another issue is the estimation and measurement of the quantities dredged and disposed (required and actually done), in the absence of any totally reliable and scientifically accurate process for measurement. Hence, the [measurement of actual dredging performance](#) in various projects continues to lack credibility.

Dredgers need [infrastructural facilities](#) like all other types of ships for repairs, maintenance and waiting. Currently in India there is a lack of repair and dry dock facilities and the non-availability of marinas to store dredgers, which forces the operators to pay huge amounts as port charges, leading to increases in the overall costs of projects.

[The scarcity of trained workers](#) in India for dredging also affects performance. There is a need to regularly upgrade skills for geotechnical investigations designing contracts, running upgraded complex dredgers and performing other functional requirements. However, there is so far no thrust on formal learning of functional dredging skills as a speciality in India.

Finally, the imposition of [import duty](#) on equipment brought in temporarily for a dredging project, the application of a [service tax](#) on dredging, the exclusion of profits made from the sale of dredgers from the Tonnage Tax scheme and the Transfer Pricing mechanism are some of the things that increase the cost of dredging and make the sector less attractive for

domestic investors.

THE WAY FORWARD

Since the stated objective of GOI is to achieve navigable drafts of 14 meters and 17 meters for India's major and hub ports respectively by 2020, the opportunities in dredging are substantial. The following recommendations may be relevant for some of the challenges discussed so far.

- a. Compulsory stipulation / insertion of critical terms and conditions in dredging contracts according to prescribed Bureau of Indian Standards (BIS) and international standards (Federation Internationale Des Ingenieurs – Conseils) can ensure inclusion of details on technical aspects, risks, costs and the process of measurement, which will make contracts clearer.
- b. Use of experts in dredging as project management consultants may be a practical option for bridging with certainty gaps in knowledge.
- c. GOI may consider developing a balanced capital dredging policy that allows risks to be shared reasonably and appropriately between the employer and the contractor. Also, GOI may set up a single body for monitoring the compliance and handling one-window project clearances and approvals.
- d. A GOI initiative for encouraging development of infrastructural facilities catering to dredgers is necessary.
- e. Setting up of at least one academic institution for training under public or private sponsorship appears to be a

feasible initiative for training needs.

- f. Review of the process and documentation for duties and taxes and standardization of the same by GOI is a demand that has been pending for a long time. GOI may also review duties and taxes to encourage the building of more dredgers in the country and to encourage and support ports to ensure that the required dredging is carried out on time and desired depths are sustained.

J M Baxi & Co has been serving the needs of dredgers of both Indian and Foreign Dredging Contractors for a long time at various ports and offshore, in India. We provide in Table III below the deployment of dredgers in various ports across India as on 31st Dec, 2013 ■

Table III Current Deployment of Dredgers at Indian Ports

PORT	NO. OF DREDGERS	TYPE OF DREDGING
Calcutta & Haldia	5	Maintenance
Dhamra	1	Maintenance
Paradip	2	Maintenance
Vizag	1	Maintenance
Kakinada	-	-
Krishnapatnam	3	Capital
Chennai	1	Maintenance
Ennore	3	Capital
Tuticorin	1	Maintenance
Cochin	3	Maintenance
Mangalore	1	Maintenance
Mormugao, Mumbai	-	-
JNPT	2	Capital
Hazira	4	Maintenance
Dahej	1	Maintenance
Sikka, Bedi, Porbandar	-	-
Pipavav	5	Maintenance (shipyard)
Kandla	4	Maintenance
Mundra	2	Maintenance

Weights & Measures

Exploring Opportunities In The Sugar Value Chain

India's external trade in sugar – mainly comprising finished sugar and raw sugar – despite year-on-year variances – continues to be an important value-added component of its agricultural trade.

India's share of global sugar production has impressively risen from 5% to 15% in the last five decades. During this period, India's share of global sugar consumption too has gone up from 5% to 13% with an estimated Compounded Annual Growth Rate (CAGR) of 3.5%. India's per-capita consumption of sugar is currently estimated at 18 kg for 2011-12 and another 5 kg of per capita sweetener consumption. Significantly, India is also self-sufficient in meeting its sugar demand and also generates an exportable surplus during bumper harvest years, while in a year of shortfall, imports of raw sugar supplement the gap.

There are, however, a number of market distortions and industry constraints holding back the progress of the sugar industry and fuller exploitation of the opportunities inherent in the sugar value chain. Sugarcane farming supports over 50 million farmers across Uttar Pradesh, Maharashtra, Gujarat, Karnataka, Andhra Pradesh and Tamil Nadu. Farmers are recipients of various subsidies and are further entitled to guaranteed state procurement at the Minimum Support Price (MSP). The sugar mills too are under regulatory controls for meeting levy sugar obligations, besides re-export obligations against imports of raw sugar.

The movement of the sugar cane from farm to factory and its early crushing are ensured because sugar factories are located close to cane-growing areas.

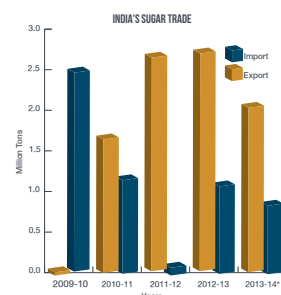
Geographical zoning means that cane farmers do not lose out by having to move the cane over long distances. The sugar refining process commences from the postharvest stage till the final bagging of finished sugar, which accounts for the bulk of the value-addition in the commodity value chain. However, due to the seasonality of cane cultivation, the sugar industry does not work throughout the year, so there is the additional cost of maintaining idle capacity in the lean season. The installed refining capacity of sugar mills is thus underused and this has cumulatively led to problems in the industry, with recurrent shortages of raw materials.

A key strategic objective behind industry de-regulation and the consequent entry of private sector players is to build fresh sugar refining capacity for raw sugar – either imported or domestic raw sugar. The switch to using raw sugar feedstock is aimed at overcoming the structural constraints faced by the sugar industry in terms of streamlining its linkages with the global sugar economy and trade. Standalone coastal sugar refineries that use raw sugar are now being set up; two are already functioning on the Gujarat and West Bengal coasts. Cooperative sugar

mills that crush sugar cane are also being encouraged to cut down on production of finished sugar and instead produce raw sugar that could be used by private sector refineries or exported to overseas sugar refineries.

The switch to domestic raw sugar production faces, however, altogether new challenges from emerging global trade regimes. For instance, India's recent decision to encourage raw sugar exports through subsidies to exporters of raw sugar is facing international flak from World Trade Organization (WTO) members. Australia, Colombia and Brazil, which compete in the global sugar market, have said that the subsidies would affect their interests and distort the market. A subsidy of Rs. 3,300 per tonne of exported raw sugar had been approved by the government in February 2014. India has so far stoutly defended the move, saying that WTO rules only prohibit export subsidies on finished products and raw sugar is a semi-processed item.

The challenges on the sugar front are manifold: Firstly, ensuring remunerative cane prices and the settlement of arrears to cane farmers is a policy priority and an essential part of the inclusive and equitable growth strategy. Secondly overcoming the negative consequences of cyclicity and wide year-on-year variations in sugar cane output and finished sugar production is yet another key challenge that requires stabilisation of sugar production by freeing the constraints on the flow of raw material feedstock ■



	Acreage In Million Ha	Cane Output MT	Sugar Output MT	Sugarcane Yield MT Per Ha
2002-03	4.520	28.738	20.132	63.38
2003-04	3.930	23.386	13.500	59.38
2004-05	3.660	23.709	13.660	64.75
2005-06	4.200	28.117	19.320	66.92
2006-07	5.150	35.552	28.200	69.02
2007-08	5.060	34.819	26.300	68.88
2008-09	4.420	28.503	14.680	64.55
2009-10	4.170	29.230	18.800	70.02
2010-11	4.800	34.238	24.350	70.09
2011-12	5.400	36.104	26.340	71.67
2012-13	4.999	34.120	25.140	68.25
2013-14	5.032	34.592	25.000	68.74

Source: NCAER, ISMA and the Ministry of Agriculture

Port Statistics

SHIPPING & CARGO PERFORMANCE

QUARTERLY UPDATES ON INDIAN MAJOR & NON-MAJOR PORTS (QTY IN MILLION TONNES)

JANUARY - MARCH 2014 (IVth QUARTER) / APRIL 2013 - MARCH 2014

AGRICULTURAL PRODUCTS

	SUGAR		SOYAMEAL		WHEAT		RICE		MAIZE	
	IV th Qtr	Apr'13-Mar'14	IV th Qtr	Apr'13-Mar'14	IV th Qtr	Apr'13-Mar'14	IV th Qtr	Apr'13-Mar'14	IV th Qtr	Apr'13-Mar'14
No. of Ships called	13	32	14	67	20	81	7	84	24	90
Total Cargo Handled	0.351	0.719	0.362	1.245	0.797	2.489	1.172	1.928	0.407	1.427
Inbound	0.136	0.199	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000
Outbound	0.215	0.520	0.362	1.245	0.797	2.489	1.172	1.928	0.407	1.427

FINISHED FERTILIZERS & FERTILIZER RAW MATERIALS

	UREA		SULPHUR		ROCK PHOSPHATE		DAP		MOP	
	IV th Qtr	Apr'13-Mar'14	IV th Qtr	Apr'13-Mar'14	IV th Qtr	Apr'13-Mar'14	IV th Qtr	Apr'13-Mar'14	IV th Qtr	Apr'13-Mar'14
No. of Ships called	15	128	20	61	38	155	1	66	14	83
Total Cargo Handled	0.551	5.593	0.434	1.359	1.451	5.851	0.048	2.704	0.325	2.199
Inbound	0.551	5.593	0.283	1.158	1.451	5.851	0.048	2.704	0.325	2.199
Outbound	0.000	0.000	0.150	0.201	0.000	0.000	0.000	0.000	0.000	0.000

COAL

	THERMAL COAL		COKING COAL		MET COKE		PET COKE		ALL COAL	
	IV th Qtr	Apr'13-Mar'14	IV th Qtr	Apr'13-Mar'14	IV th Qtr	Apr'13-Mar'14	IV th Qtr	Apr'13-Mar'14	IV th Qtr	Apr'13-Mar'14
No. of Ships called	164	600	148	567	22	84	17	67	0.000	2,066
Total Cargo Handled	8.105	29.928	8.427	29.510	0.576	2.355	0.631	2.399	0.000	192.384
Inbound	2.341	9.615	8.427	29.488	0.544	2.301	0.594	1.675	0.000	159.691
Outbound	5.764	20.313	0.000	0.022	0.032	0.054	0.054	0.037	0.000	21.636

STEEL & RELATED ORES

	STEEL PRODUCTS		SCRAP METAL		CHROME		MAGNESIUM ORE		IRON ORE	
	IV th Qtr	Apr'13-Mar'14	IV th Qtr	Apr'13-Mar'14	IV th Qtr	Apr'13-Mar'14	IV th Qtr	Apr'13-Mar'14	IV th Qtr	Apr'13-Mar'14
No. of Ships called	156	656	1	5	2	11	21	57	164	534
Total Cargo Handled	1.703	5.723	0.027	0.124	0.008	0.135	0.453	1.193	7.769	26.587
Inbound	0.632	2.484	0.027	0.124	0.000	0.000	0.044	0.044	1.972	7.765
Outbound	1.071	3.240	0.000	0.000	0.008	0.135	0.409	1.149	5.797	18.822

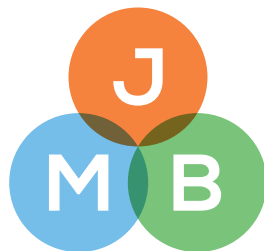
INDIAN PORT PERFORMANCE - Q4 & FY 2013-14 THROUGHPUT(QTY IN METRIC TONNES)

JANUARY - MARCH 2014 (IVth QUARTER) / APRIL 2013 - MARCH 2014 QTY IN MILLION TONNES)

Ports	Types of Ports	NO. OF SHIPS		LIQUID CARGO		BULK CARGO		CONTAINERS (TEUs)		TOTAL CARGO *	
		IV th Qtr	Apr'13-Mar'14	IV th Qtr	Apr'13-Mar'14	IV th Qtr	Apr'13-Mar'14	IV th Qtr	Apr'13-Mar'14	IV th Qtr	Apr'13-Mar'14
Kandla	■	68	793	0.476	4.622	0.566	10.485	0	29,419	1.110	16.381
Mumbai	■	305	1528	1.050	10.575	1.593	8.056	11,052	40,757	2.157	19.661
Nhava Sheva	■	110	474	1.057	5.363	0.163	0.751	1,127,019	4,159,262	2.220	7.117
Mormugao	■	109	352	0.191	0.665	1.892	7.686	-	-	2.149	8.983
Mangalore	■	250	1068	6.107	24.741	2.264	9.597	13,021	50,089	6.289	34.706
Cochin	■	170	610	3.186	14.505	0.190	1.106	91,901	356,204	3.530	15.798
Tuticorin	■	105	718	0.357	1.564	3.720	16.029	138,740	507,294	3.856	18.542
Chennai	■	296	1159	3.077	14.184	2.194	7.249	353,451	1,465,589	5.294	22.831
Ennore	■	201	713	0.727	2.560	5.917	22.861	-	-	6.697	25.620
Vishakhapatnam	■	386	850	3.541	7.319	5.692	14.008	62,677	262,091	5.594	21.726
Paradip	■	321	1425	3.777	19.506	8.645	39.140	-	-	4.901	58.715
Haldia	■	427	1110	1.838	6.031	2.298	9.525	-	-	4.132	15.604
Kolkata	■	48	179	0.005	0.067	0.004	0.078	-	562,512	0.191	0.709
Gangavaram	■	55	181	-	-	2.410	12.117	-	-	2.428	12.140
Pipavav	■	113	358	0.001	0.028	1.446	5.537	194,043	694,373	1.373	5.575
Mundra	■	232	1062	5.574	23.015	12.000	44.160	703,571	2,391,668	13.758	67.804
Dahej	■	152	529	4.411	17.883	1.077	8.376	-	-	5.489	26.378
Hazira	■	65	149	0.935	3.727	0.343	2.289	24,003	87,015	1.306	6.049
Navlakhi	■	24	90	-	-	1.312	4.423	-	-	1.051	4.423
Kakinada	■	114	668	0.261	1.785	1.103	8.282	-	-	0.930	12.228
Total Vessel Calls at all ports		3551	14016	36.571	158.14	54.829	231.755	2,719,478	10,606,273	74.455	400.99

■ Major Port ■ Non-Major Port

* Total Cargo Includes Liquid Cargo , Bulk Cargo and Other Cargoes and Excludes Containers



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