

J. M. BAXI GROUP

TIDINGS

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From the Quarter Deck

While you are reading this message from the quarter deck, India is in the midst of its 5 yearly election process. The logistics required to conduct the election never fails to fascinate me. Upwards of 800 million people will be eligible to vote. In the last 5 years 100 million voters have joined the list, that is 20 million additional consumers every year. Elections also convey our deep-rooted democratic ethos and fundamentally reaffirms the rule of law.

While India readies itself for the 16th Lok Sabha, the last 5 years have left us with a future where we will have to cope with an ongoing global recession of unprecedented proportions, which started in 2008. America seems to be on the road to recovery and Europe seems to be inching out as well. Africa seems to be making steady progress. South America (led by Brazil) seems to be a bit stressed. China has become the second largest economy in the world and seems to be taking practical proactive decisions as it faces its regular challenges. Against this backdrop India will need to address the problems of inadequate infrastructure i.e. roads, rail, power and ports. India will need to address suboptimal policy and regulations and non performing assets that plague the banking system. India will need a regulatory regime that is:

- Transparent
- Efficient
- Expeditious

The next 5 years will be an opportune time for all of us stakeholders of India to put our heads down and seriously work to ensure continued progress.

The shipping markets remain stressed and therefore our principals remain stressed. It is becoming increasingly imperative that we find ways and means to deliver savings and efficiencies for our principals through an efficient mix of reporting, cost controls and quicker turnaround

times resulting in enhanced levels of ship calls and voyages. We shall continue taking this forward and still a lot can be done and will be done. We have in the last year implemented specific programmes, which have begun to yield results for our principals and customers and which have proven successful. At different ports and across select commodities and services we have achieved savings for our principals and customers.

The three components of shipping and logistics that are expected to show change and growth in India are going to be:

- Containers
- Gas transport
- Break-bulk projects

The changing equations of shipping companies and various consortiums, the fast changing sizes of ships and the changing trade route patterns are likely to present a different picture in India. India's need for gas is increasing and it is expected that compared to the present level of six to eight LNG ships being dedicated to India, approximately 20 to 25 LNG ships will be deployed in the Indian market in the next two to three years.

With evidence of a slow recovery underway, stalled industrial projects are likely to start opening up leading to imports and exports of capital goods and produce. Dovetailed with this gradual recovery, India's agriculture sector seems to be continuing its robust growth, which is expected to continue for some time.

In this issue you will read about dredging and as we all know that depths and draught available at ports is of critical importance for India's participation in global trade. Our Indian ports will have to post-haste invest in creating deeper ports to accommodate ever larger ships. Our Indian trade can ill afford losing out on competitiveness that is possible with the economies of scale afforded by larger ships.



On the ports side we have seen the award of the giant container terminal project at JNPT (JNPT 4) to PSA, which is expected to add upwards of 4 million teus capacity. We have also witnessed the award of the Ennore Container Terminal to the Adani group, which will add approx 1.5 million teus capacity.

The coming 5 years present an opportunity, of course with its corresponding sets of challenges and we should be ready. Thus I would conclude with the words of Shakespeare

*"There is a tide in the affairs of men
Which taken at the flood, leads on to
fortune;*

*Omitted, all the voyage of their life
Is bound in shallows and in miseries.
We must take the current when it serves,
Or lose our ventures" ■*

Agency & Services

Import Of Edible Oil Into India: A Brief Report

India, the world's biggest buyer of edible oil, imports more than half of its edible-oil needs from abroad. The main items imported are listed below.

1. Crude Palm Oil and Palmolein (CPO)
2. Refined Palm Oil/Palmolein (RBDPL)
3. Soya Bean Oil (SBO)
4. Sunflower Oil (SFO)

CPO and RBDPL account for about 70% of total import while the balance 30% is composed of SBO and SFO.

Till April, 94, the import of Edible Oils was canalized through STC largely as a matter of GOI policy for catering to the consumption needs under the Public Distribution System and for supplies to domestic industry. In April, 94 import of RBD Palmolein was placed under OGL followed by the placement (under OGL) of the other varieties in March, 95. The volume of import started increasing rather rapidly thereafter.

Quantity of Edible oil imported by India in the current marketing year – Nov, 12 to Oct, 13 hit a record high compared to previous years. Total quantity of import increased to 10.38 Million MT in 2012-13 compared to 9.98 Million MT in the previous year representing a rise by 4%. The increase was mainly on the back of a 8 % jump in total crude and refined palm oil imports at 8.3 million tons. In the next marketing year from Nov, 13 to Oct, 14, import quantity of edible oil into India is expected to rise by more than 4% to 11.13 Million MT, driven by a relatively higher jump in import of sunflower oil.

Table I below provides the comparative figures for the Indian Crop on the basis of marketing year

to marketing year (November to October, 13).

Table I (Indian Crop – Last three years in '000 MT)

Parameters	2011-12	2012-13	2013-14
Production	6800	7100	7750
Imports	10200	10600	11000
Consumption	16575	17250	18100

GATEWAY PORTS IN INDIA:

J M Baxi & Co has been associated with all major ship owners and charterers active in import of edible oils for ship husbanding and shipping support as required and handled over 1.5 Million Tonnes of edible oils in 2013. We provide the details of quantities of edible oil imported in 2013 through different ports of India in Table II below from our data base. It is relevant to note that all edible oil import of Nepal (150000 MT per annum approximately) moves in through Kolkata/Haldia.

Table II (Edible Oil Imports through Indian Ports in 2013)

Port Locations	Cargo Description	Quantity (Mt)
Kolkata	CPO	552616
	RBDPL	85151
Haldia	CPO	756985
	SBO	208455
	SFO	8995
	RBDPL	20448
Paradip	CPO	30016
	RBDPL	18606
Kakinada	CPO	423859
	SFO	92837
	RBDPL	186853

Port Locations	Cargo Description	Quantity (Mt)
Krishnapatnam	CPO	99019
	SFO	23666
	RBDPL	12991
Chennai	CPO	113852
	SFO	656005
Tuticorin	CPO	47031
	RBDPL	84196
New Mangalore	CPO	423480
	SFO	79452
	RBDPL	98635
Karwar	CPO	4900
	RBDPL	223313
Mumbai	CPO	192947
	RBDPL	58604
JNPT	CPO	258363
	SBO	92903
	SFO	124005
	RBDPL	275621
Kandla	CPO	1572027
	SBO	288249
	RBDPL	273428
Mundra	CPO	290692
	SBO	515351
	SFO	69910
	RBDPL	38099

TOTAL -
CPO : Crude Palm Oil (4808953 MT)
SBO : Soya Bean Oil (1104958 MT)
SFO : Sun Flower Oil (1056369 MT)
RBDPL : Refined Palmolein/Palm Oil (1214102 MT)

SOURCING:

India (and Nepal) sources CPO and Refined Palm Oil largely from Indonesia and Malaysia while SFO and SBO are imported from Latin America and Russia as evident from Table III that follows.

Agency & Services

Table III (Countries of Origin for Edible Oil Imports into India)

Commodity	Country Of Origin	Import Share
CPO	Malaysia	33%
	Indonesia	67%
RBDPL	Malaysia	35%
	Indonesia	65%
SBO	Argentina	72%
	Brazil	28%
SFO	Ukraine	96%
	Argentina	4%

REFINING AND DOMESTIC INDUSTRY:

There are many domestic players who have set up vegetable oil refineries in the country at various places, obviously keeping in view the port access and proximity, and consumption patterns. Many of these have come up in the last decade actually. The top refinery operators and location of their refineries are listed in Table IV below.

Table IV – (Major Edible Oil Refineries in India)

9100	Mundra/Haldia/Krishnapatnam/ Kakinada/Mangalore Adani Wilmar Ltd
9700	JNPT/Kandla/Mangalore/ Chennai/Kakinada/Haldia Ruchi Soya Ind Ltd
3500	Pune/Kandla/Paradip Cargill India Pvt.Ltd
2700	Krishnapatnam/Haldia Emami Biotech Ltd.
2500	Kandla/Krishnapatnam LouisDreyfus Commodities
1800	Maharashtra (Shahpur) Liberty Oil Mills Ltd
1000	Krishnapatnam/Kakinada Gemini Edibles & Fats
2700	Kandla/Haldia Gokul Refoils & Solvents
9000	Various Small Operators
42000	Total

Location of Refinery

Operator

CURRENT SCENARIO, CONSTRAINTS & ISSUES :

The Indian refiners' first disadvantage in achieving a competitive conversion cost comparable to that of manufacturers situated in Malaysia and Indonesia lies in lower scale of capacities in India in addition to lower capacity utilization.

The second constraint is also probably the most critical issue today for the Indian domestic industry of edible oils which is related to pricing disadvantage of Indian refined product in relation to the imported refined product because of duty differential effect.

During the peak season last year, Export Duty was applicable in Indonesia on CPO and RBDPL @ 10.50% and 4% respectively; Likewise, Export Duty on these two commodities was applicable @ 4.50% and 0% respectively on CPO and RBDPL in Malaysia. Thus, Indonesia and Malaysia were clearly providing a duty linked incentive of 6.5% and 4% for their exporters of the refined product with a clear objective of pushing its export. Incidentally, Malaysia imposed 0% duty on RBDPL possibly to gain export share over Indonesia, the larger player in this sector.

The Indian Refiners complain that they have developed refining capacity in excess of 15 million tonnes in the edible oil sector at a total investment of INR 200000 million. Yet, only 48% of average refining capacity is being utilised, as Indian traders are being encouraged to import the refined product more. Consequently, capacity utilization rarely exceeds 60% even in the peak season while it drops to 30% or so in the lean season.

Import duty on RBDPL was raised from 7.5% to 10% very recently in Dec, 2013 creating a difference of 7.5% between the duties on CPO and RBDPL. Indian refiners however claim the increase in duty on RBDPL (it was 7.5% till Dec, 13) by 2.5% to be too meagre. They clarify that

the difference in CIF price between imported CPO and RBDPL is about USD 20 PMT presently while the cost of the Indian Refining ranges between USD 40 – 50 PMT making direct import of RBDPL still attractive. The domestic industry is therefore expected to continue pushing GOI for creating an import duty difference of minimum 14% between the crude and refined products going forward.

The last challenge of the industry is related to specifications prescribed by GOI for qualification of CPO as Edible Oil. According to the Food Safety & Standards Act of 2006 (FSSA), CPO with an Acid Value (AV) of more than 10 does not qualify as edible oil. In contrary, most supplier countries like Malaysia work on the basis of their industry standard (PORAM) by specifying acidity of oils/fats in terms of Free Fatty Acid (FFA) calculations. According to PORAM specifications, CPO largely has 5% FFA which after conversion shows an AV more than 10 due to an anomaly. This makes frequent CPO consignments imported as ineligible for being considered as edible oil leading to higher duty and obviously, disputes. The industry has requested GOI to modify the FSSA specifications and make it compatible with the FFA calculations to remove the anomaly ■

Agency & Services

Master Distributor Deal With Alvarion



Breezeultra HR

High speed connectivity and communication networks are an inseparable part of offshore logistics. Data availability and high-capacity connectivity are thus, increasingly becoming ever more critical for the oil and gas exploration sector, a key segments serviced by J M BAXI GROUP. With the larger offshore oil and gas reservoirs becoming depleted and being slowly replaced by numerous smaller wells in remote regions, wireless broadband networks delivering effective communications are becoming critical in helping oil and gas companies. Wireless technology enables seamless network connectivity, integrating the entire offshore operation chain – from the drilling area to the operations area and the back office. Thus, it is a strategic asset, one that is vital to the success of business operations.

BreezeACCESS VL,
Family HR1

As part of its effort to broaden and upscale its technology offerings, Arya Communications & Electronic Services (P) Ltd (Aryacom), the offshore communication support services arm of the J M BAXI GROUP, has signed a Master Distribution Agreement for broadband wireless products and solutions from M/s Alvarion Ltd, Israel. These will operate in licensed and licence-exempt frequency bands, replacing its former Wavion Wi-Fi products, which were used in South Asia. Since both companies complement each other in terms of technology, product offerings, geographical presence, customer knowhow and distribution channels, the tie-up will allow Aryacom and



J M BAXI GROUP

Alvarion to become a major force in the broadband wireless access market, with their growing range of applications.

The Alvarion tie-up comes against the backdrop of years of effort at establishing technology leadership, with Aryacom having already established exclusive tie-ups with some of the world's leading manufacturers of quality communication products. Besides wireless broadband products, Aryacom currently distributes two-way radio communication products and trunking systems from Motorola, USA, high-end security locks and locking systems from M/s Stanley Security Solutions and Sargent & Greenleaf, USA, GPS/text/

Combined Sector -
Omni Left Shadow

dispatcher software for Mototrbo radios from M/s Neocom, Russia, SCADA telemetry radios from 4RF, New Zealand, AOT purifiers from Wallenius Water, Sweden among others.

Aryacom also provides consultancy in end-to-end solutions for E-governance, last mile connectivity, SCADA telemetry, wireless-based video surveillance and HTMS projects. Aryacom has experience and a good reputation in providing professional engineering and O&M services as well as 24x7 helpdesk support services for a select product range ■



Breezemax Extreme CPE HR

Agency & Services

Offshore Logistics: A Vital Link

Gujarat State Petroleum Corporation (GSPC), a drilling operator, has awarded Larsen & Toubro (L&T) an EPC contract covering a complete plethora of activities including the design, fabrication, transportation, installation and commissioning of all the facilities for the Deen Dayal Field Development (DDWI) and Process cum Living Quarter Platform (PLQP) at the Deen Dayal Offshore field in KG Basin on the east coast of India.

The project was not only technically challenging for L&T but equally challenging was the co-ordinated logistics support to be provided to a fleet of vessels consisting of 2 accommodation barges, 2 anchor handling tugs, 2 crew boats, 6 combos of tug and transportation barges and 1 semi-submersible crane vessel with its attendant vessels. These were needed to transport and install the Living Quarter Module and Helideck fabricated in L&T's yards in Hazira (on the west coast of India) and Kattupalli situated north of Chennai (on the east coast of India) to the offshore site in KG Basin. The semi-submersible crane vessel Hermod of Heerema Offshore deployed for the project is one of the world's largest crane vessels with a tandem lifting capacity of 8100 tonnes. The heaviest lift needed for this project was for the south deck, which weighs approximately 3660 tonnes.

Logistics is a vital link in the oil and gas industry and both L&T and Heerema Offshore selected Arya Offshore, a J M BAXI GROUP company, to provide the critical logistics support. Arya Offshore was tasked to provide comprehensive agency services at Hazira, Kattapalli, Visakhapatnam, Kakinada and KG Basin Offshore.



Arya Offshore Provides Logistics Support to L & T / Heerema Offshore at Deen Dayal Offshore Field Off Kakinada

To meet the requirement for simultaneous action at various locations and ports, Arya Offshore established a virtual 'War Room' in Mumbai to coordinate all the activities. These included customs and other formalities both at departure ports and on arrival at site, defence clearance for the crews and vessels, physical naval inspection of the vessels and crews, operating licences for the fleet to operate in KG basin and ferrying crews and materials to and from the offshore site. The online in-house developed business process system enabled the clients, L&T and Heerema Offshore, and Arya Offshore to be on the same page through the real-time exchange of information. Though Arya Offshore has extensive experience of handling heavy lift vessels in the past, since it was providing logistics support to Heerema Offshore for the first time, it required both macro and micro level coordination at various stages. Arya Offshore sent personnel to Batam, Indonesia the last port of call of the vessel prior to departing for India, to ensure that all documentation was in order and in accordance with Indian customs and immigration regulations. The planning and adherence to timelines set by our team ensured that there were no undue delays in deployment of the barges and vessels for the project.

The project ran from October 2012 to June 2013 and during this period Arya



Offshore transported 4200 personnel to and from the offshore site and attended to 215 port calls. The Operations teams of Heerema and L&T were appreciative of the efforts put in by the Arya team in providing onshore support and particularly for the assistance provided in flying in, in the shortest possible time, the technicians needed to repair the heavy lift crane - the lifeline of the vessel. This is what the Operations Manager had to say in his message of 30th January 2013 ■

Good day,

The Hermod is fully operational again and working safely after serious electrical problems had occurred. The unusual nature of these problems required the intervention of two specialists that have worked tirelessly over the last few days and, as a result have been able to locate and repair them.

Your assistance in getting the specialists, their equipment and spare parts on board have been instrumental in the success of this operation.

On behalf of Heerema, the Hermod and her crew, I would like to thank you for your efforts, and commend you for a job well done.

Thank you,

With kind regards,
Leen Moerman

Operations Manager / TOSO HERMOD
Heerema Marine Contractors

In Conversation

Women In Family Managed Businesses- A Double Job An Achievers Perspective

Women in Family Business is a catchy phrase, sounds good. What about women in family businesses who don't work in the family business? Perhaps they have chosen to be caregivers and homemakers, or they could be working outside the family business. However, they are an integral part of the family. They affect the family business and in turn are affected by the family business. The role of a woman as a wife and a mother is important for succession and continuity in business. The men are not going to be producing babies any time soon, so our role will be important in the family dynamics. We are all CEOs in our own right- Chief emotional officers. Personally, I think it's important that we raise our children, our boys and girls, our sons and daughters to be secure, self-motivated adults without a false sense of entitlement. We must assimilate them and inculcate our family values in them.

Regarding the role of women in FMBs, if a woman's objectives and, as importantly, her skill set can be aligned with those of the family-managed business, there is a great opportunity to found a mutually advantageous long-term symbiotic relationship. The family can tap into this huge HR potential-let's face it guys-where else would you get such loyal, financially conservative, natural multi-taskers? Whereas for the women, where else would you be afforded such flexibility with your time as long as you don't abuse it and demonstrate seriousness of purpose? A women's role, the boundaries, accountability, area of influence need to be defined clearly for this to work.



Sonal Gandhi, a cost accountant, overlooks overseas taxation, finance and investments at the Express Group for the past 23 years.

Express Global Logistics has been providing professional and efficient logistics solutions, specializing in project handling, for imports and exports since 1946.

I would also like to share a little of my personal journey and what worked for me.

Firstly, before venturing out, ensure that a true partnership with your spouse and his family has been established. By that I mean a level of trust and exchange of info that reduces insecurities. I was given a free hand, was always encouraged and allowed to find my feet slowly. For that I have to thank my in-laws and Nailesh.

Secondly, in the Indian social context, running the house and child-rearing are primarily the responsibility of the woman. The sooner I accepted that, the faster I was able to get on with things. As Maya Angelou said, 'Nothing will work unless you do.'

Thirdly, the elusive work/life balance is just that-elusive. You are never going to have everything in a perfect state of equilibrium. You are always going to be pushed and pulled in different directions but if you are able to stick through the tough 5 – 10 years when the kids are really small, life does settle down with a rhythm. So it's Ok if the cook takes a holiday and the driver doesn't show up and you have to fill in-just stick with it.

Lastly make mistakes – but at least try! When you step outside your comfort zone – that's when life really begins. I personally believe that your choices make you who you are-far more than your ability. So it is very definitely a double job but is doubly rewarding because you get the best of both worlds. The only thing that I don't get is double pay ■

Logistics

Imbalance In Container Trade In The Northern Hinterland

India's bagged rice exports of both basmati and non-basmati rice varieties - form an important component of India's containerised commodity trade. India's northern agricultural hinterland, comprising the states Haryana, Punjab, Himachal Pradesh, Uttar Pradesh, Delhi, Uttarakhand and Jammu and Kashmir, which together produce over 58% of India's home-grown rice, happens also to have the major point of origin of this vital cargo, which is mainly exported from the ports at Kandla and Mundra.

The logistics of exporting rice from the growing areas to these gateway ports however, face some unique challenges, mainly owing to the imbalance in container trade in the northern hinterland. There are not enough containers for shipping the rice in bags. There are also problems with repositioning empty containers at several rice export centres, which is forcing the export trade (shippers) to use road transport for moving the cargo. The rice is then stuffed into containers in the CFS at the gateway ports.

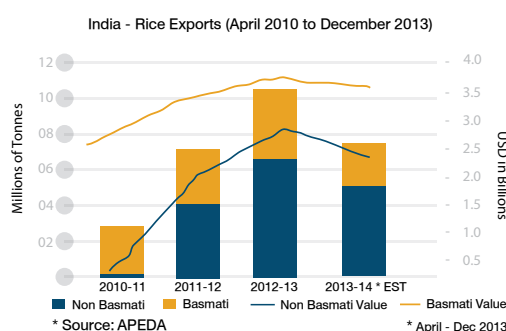
While rail-based movement of stuffed containers could result in considerable savings compared to the costly road transportation used currently, making empty containers available would also entail higher costs for shippers, in view of cabotage restrictions. Steel scrap was a high-volume cargo that used to be moved from west coast ports to northern steel re-rolling centres. The reduction of this trade has added to the imbalance in container movement.

The export trade is thus facing a number of challenges, in achieving the

necessary consistency, consolidation and stability in trade performance, both in terms of volumes and price realisation and further value addition. Looking ahead some of these challenges include:

Logistics and Inventory Constraint

There are surplus foodgrain stocks but exported rice is sold at a low price because of the relatively higher costs for domestic logistics. These constraints in the supply chain stem from the lack of empty containers due to problems in timely repositioning. The problem is compounded by the uneven distribution of export inventory to be moved at several centres, since the initiative for consolidating the volumes is in the hands of the shipping lines.



Scope for Value-added Exports

The lack of adequate bulk storage capacity and other required facilities is also eroding the scope for value adding activities especially proper grading, branding and retail packaging of rice (25, 10 and 5 kg packets) for consolidated direct distribution to retail markets overseas. Solving this problem could considerably enhance value realisation possibilities, compared to exporting bagged rice. Overcoming

the above constraints would help India emerge as a big player in the global rice market. Already production of both basmati and non-basmati varieties is set to surpass earlier records. Globally, Vietnam and Thailand will fall behind in volume terms each exporting around 7 to 8 million tonnes. India's key competitor in selling aromatic basmati rice is Pakistan, whose tonnage is unlikely to exceed 3 million tonnes; while China, the world's largest producer, is becoming a net importer of rice. India's share of the global rice trade of 38 million tonnes will be about 28 percent in FY 2013-14. The major buyers of basmati rice from India and west Asia. The West Asian demand is mainly catered out of Kandla and Mundra ports.

J M BAXI GROUP's multi-cargo hub DICT, strategically positioned in Sonapat (Haryana), is poised to play a key role in catalysing rice trade in the region by overcoming the logistics challenges ■

Logistics

BOXCO Starts 2014 Innings With A Century

Boxco Logistics has yet again broken its record for the longest cargo handled, by transporting a 102 m long ethylene fractionator designed and manufactured by ISGEC Hitachi Zosen India Ltd in January.

The column was transported from ISGEC's Dahej factory to Adani port, Dahej, for loading onto a heavy lift vessel using a hook. The entire logistics, including engineering and transporting the equipment, was handled by the technical team at Boxco Logistics. The cargo was to be exported to a refinery in Alexandria, Egypt.

In addition to the 102 m column, there were 4 other columns to be transported along with their accessories. These were to be shipped on two different vessels as shown in the table.

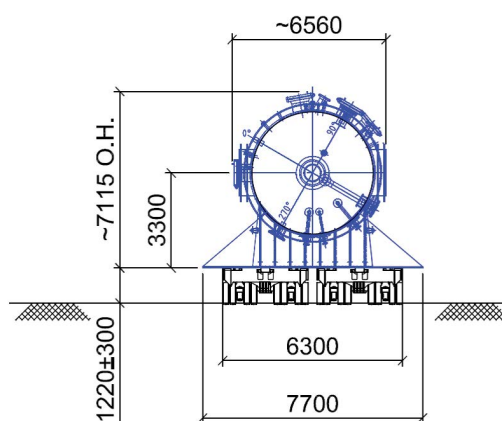
Sr. No.	Description	L (m)	W (m)	H (m)	GW (tonnes)	Loaded onto Vessel
01	Ethylene Fractionator	101.58	7.2	7.115	383	MV BBC Citrine
02	Demethaniser	58.9	3.93	4.2	88	
03	Deethaniser	43.7	3.6	4.2	89	
04	Caustic Water Wash Tower	57.55	4.3	4.65	159	
05	Quench Tower	47.3	7.7	7.85	230	MV BBC Louisiana

The project had three phases:

Phase 1

Engineering

The transportation of the columns from ISGEC plant to Adani port required intensive feasibility studies. The transportation corridor for the long column was studied in detail then demarcated to give a clear passage. Obstacles were identified, recorded and measured and then simulated in a CAD system. Actual plant drawings and port



plan drawings had to be obtained from ISGEC and Adani port for the simulation.

Required stability calculations were carried as part of the engineering process and the most suitable transportation configuration was fixed. The column loaded on the SPMT configuration was simulated

on CAD to check swept paths against obstacles. Obstacles thus identified were to be dismantled prior transportation.

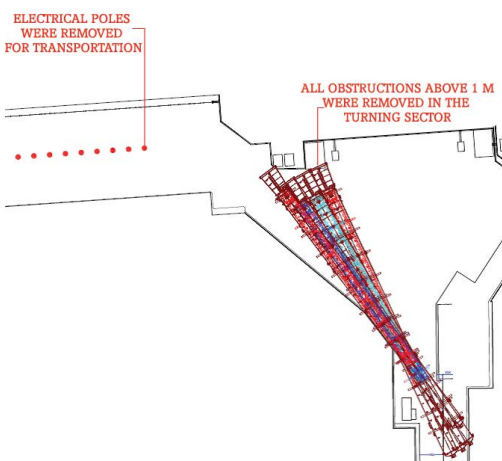
The simulation was needed for the passage through the narrow entrance to the main jetty, which is built on stilts. This was the most critical corridor of the entire project. Key challenges included obstacles like a 2.5 m high conveyor belt, a junction house a concrete winch house electric structures for quay cranes and steel railings.

The conveyor assembly was not a removable unit from the port operations point of view. To negotiate it, the column had to be significantly raised, while keeping the tilting limits within a safe range.

Self-propelled modular trailers (SPMTs) were the only option for negotiating the tight turns.

Every movement had to be meticulously planned in advance. Prior to the transportation, the civil works included removing gates and demolishing walls at both the factory exit and port entry points, widening roads and removing obstacles such as dividers and lighting poles. A shutdown of the electric HT line also had to be arranged with the local electricity boards.

The transportation had to be carried out using two different configurations. An open combination of 2 x 14+14 SPMTs was used for the long distance from the factory to the storage yard inside the port, which was mainly on solid compacted earth and stone. To keep the axle loading low, a single-line configuration of 42 SPMTs was used for the main jetty, which stands on stilts on the seabed.



Logistics

Phase 2

Civil Works

Prior to commencement of the transportation, the obstacles identified had to be removed to create the transport corridor. Permissions were obtained from the local GIDC office for carrying out this work.

From demolishing the factory's gate and wall, divers en route and electricity poles to filling and compaction of soft ground in the convoy's swept path, the civil works were engineered and executed in a flawless manner.

Phase 3

Transportation

In coordination with the local police, the movement was carried out using state-of-the-art remote-controlled Scheuerle K25 SPMTs, proven to be the most advanced hydraulic haulage equipment in the country today.

The team faced a large number of challenges including turning restrictions like divers, road ends, street lighting poles and conveyor

Special permissions required:

- 01 Police permissions for transit on road and security
- 02 Electricity board permissions for shutting down the electricity and dismantling electricity poles and lines en route
- 03 Customs and port statutory permissions
- 04 Port permissions for carrying out civil works and other logistics activities at the RO-RO jetty, such as building of ramps, provision of additional lighting
- 05 Permission from GIDC for haulage of heavy columns

belt structures despite the 8 electronic steering modes available on board the SPMTs. There were 6 critical turns to be negotiated. After carrying out the civil works, by shifting the turning centre within and beyond the trailer chassis guided by engineered swept path drawings and skilful operators, the turns and obstacles were successfully negotiated by the laden convoy. With all the time and effort put into the engineering and civil works stages, the main gate-to-gate road transportation of the 102 m column was carried out in an astounding time of 6 hours. The removable steel section of the entrance wall to Adani port was dismantled to give the convoy access to the site. Intra port transportation up to the storage plot was smooth despite the sharp S- and 90 degree turns.



The column was stored at the plot on suitable steel pedestals as per the predetermined storage plan. The remaining columns of the first shipment were then transported to the storage plot. When the vessel arrived, the small columns were delivered first, followed by the 102 m long column.

Switching to the axle configuration needed for each column to suit the vessel-lifting schedule was another challenge overcome by the experienced 15-member heavy lift team. The transportation of the ethylene fractionator from the storage plot to the vessel hook point was the most challenging part as envisaged during the engineering stage.

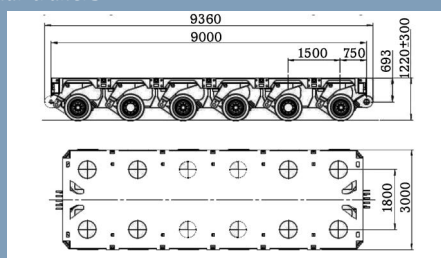
With careful manoeuvring and electronic precision control of the SPMTs, the final Y-junction leading to the South jetty was negotiated without breaking any of the concrete structures. The fractionator column was delivered to the vessel hook without damaging any of the port's buildings. Upon successful delivery of the first 4 columns to MV BBC Citrine, the quench tower was transported onto the main jetty for delivery to MV BBC Louisiana. This leg also posed a challenge in terms of the width clearance on the stilted jetty approach area; however, the delivery was smoothly executed.

With the completion of this project, Boxco Logistics has broken its previous record of the longest cargo ever handled for a second time in a year ■

In 2011, the J M BAXI GROUP added to its vast fleet of heavy lift equipment by procuring the invaluable Scheuerle K25 SPE self-propelled modular trailers.

Some of the advantages of this equipment are:

1. **Modular Design** – The trailers are assembled from modules with 4, 6 or 8 axles, which can be coupled to each other longitudinally as well as laterally. The K25 SPEs can couple mechanically and hydraulically to JMB's existing fleet of Goldhofer THP SL axles, which gives the team a wider range of combinations for transportation of different types of loads.
2. **Hydraulic Drive** – Imparts powerful and precise drive control with a motion accuracy of millimetres.
3. **Power pack units coupled to the chassis** eliminate the need for separate prime mover trucks. These power packs are electronically controlled by a single operator.
4. **Wide bed platform** – The K25 SPEs have



a 3 m wide platform, which is more stable than the conventional 2.4 m wide trailer beds. No other SPMTs in the Indian sub-continent have such a stable structure.

5. **Geared powertronic steering assemblies** facilitate the shortest possible steering radius. The equipment can turn 360 degrees on the spot.
6. **Electronic steering with programmable steering coordinates** – There are 16 steering modes available on board, which is unique to this equipment.

Infrastructure

Waking Up To The Roar



Infrastructure

Maersk And VCTPL: Charting Growth Plans Together



Jevris Bay calling at
Vishaka Container Terminal



Mr Shanmuganathan Balaguru
(Trade Manager, Far East & Oceania - Maersk Line)
Mr Siddhartha Mohan
(Regional Sales Manager, East India - Maersk Line)
Mr Sashi Bhushan Giri
(Sr. Executive, Odisha Hinterland - Maersk Line)
and other VCTPL representatives



Mr Anil Narayanan, VP, Operations, VCTPL
giving a presentation during the workshop

As the first of its kind, Maersk Line and Vishaka Container Terminal Pvt Ltd (VCTPL) held a one-day workshop on the 24 January 2014. Maersk's is a well written success story at Visakhapatnam already; and the terminal too has benefitted in good measure due to the services of this global leader. There has been growth despite the global recession affecting overseas trade. This is because the quest for improvement and enhancement of business has not stopped. The innovative idea of holding a workshop was mooted by Mr Sanjay Tiwari, Director Sales, India and Sri Lanka, Maersk India, during an earlier visit he made to the terminal. The aim was to further the growth in traffic and improve services to the trade during these difficult times faced by the maritime industry.

Working on a pre-planned agenda,

the meeting started with a review of the performance till now. VCTPL's presentation on the subject gave a brief overview of the infrastructure and improvements made recently at the terminal. The brief by Maersk gave their assessment of the situation and their ideas on further development. The intention of having a very open and purposeful discussion was evident from the start. The points under discussion included - 'What went wrong?' The aim was to improve all aspects of service delivery by both sides and thereby offer better services to the trade.

Increasing ICD connectivity and transshipment were two important points taken up. Individual locations and various aspects of serving each sector were discussed in detail. The need for better connectivity to Western markets to cater to the burgeoning potential was felt on

both sides. The strong need for a rebranding exercise to promote the improved connectivity to Kolkata and Haldia is to be pursued jointly, as also the need for joint efforts in developing imports especially from the East. While discussing imports the possibility of bulk conversion and project carriage was taken up and the terminal shared leads in this regard with the carrier.

In the end it was evident that the meeting was a success, especially since all agreed that such an exercise should be undertaken more often. The active interactions helped develop a rapport while helping in taking forward initiatives that would benefit all concerned. The benefit to the trade is that the efforts of both the terminal and Maersk Line would be in congruence and the product thus delivered would be superior ■

Infrastructure

Safety Week At ULA CFS



Fire Drills



Fire Drills



Mr Sanchit Patil, son of Mr Anil Patil
(Asst. HR and Admin Department)

Crane operator showing necessity of effective
communication to ensure safety

United Liner Agencies of India (P) Ltd's container freight station specialises in storage, handling and maintenance of laden and empty containers. It is equipped with specialised equipment for efficient handling of containers. The computerised operations help qualified professionals attain high levels of efficiency. Advanced surveillance systems ensure a high degree of safety that is critical at any CFS.

Safety in the workplace is of paramount importance at ULA CFS. As a service-based organisation it treats employees as its most valuable assets and nothing

is considered more important than their health and safety. The ULA CFS has thus put in place a well-planned set of rules for handling empty containers safely. It also has a fire emergency plan and fire response plan in case of any incident. Further to reinforce this safety credo among the employees, it recently organised a week-long Safety Awareness Building programme.

Workshops like Medical Camp, Fire Drill and Drawing Competitions demonstrated the importance of safety. Slogan-writing competitions were also held during the week-long event.

The fire drills helped employees understand the correct usage of the equipment and emphasised the need for appropriate emergency responses. The safety programme also guided them regarding hazards like accumulated trash, burned-out exit lights, blocked staircases, and fire emergency and fire response plan. A number of working tips on how to lift cargo safely, myths about workplace safety and ways to reduce workplace injuries were communicated to employees ■

We Connect

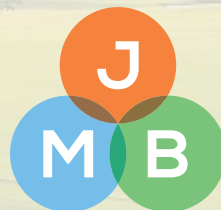


Top Row (L - R) : Mr. Anandbir Singh, Mr. Govind Ramanathan, Mr. Yuba Yasuyuki, Capt. Nandkishore Sah, Mr. Yamamoto Masashi, Mr. Hida Yoshinori, Mr. Sakamoto Kenji, Mr. Sunil Misra, Mr. Si Hoo Lee, Mr. Wen Yen Fu, Mr. Gautam Roy, Mr. Tom Lin

Second Row (L - R) : Mr. Walter Wattenberg, Mr. Carsten Wendt, Mr. Arun Balakrishnan, Mr. Jeon Tae Song, Mr. Chong Heong Tong, Mr. S K Kim, Mr. RAdm R M Purandare, Mr. Ashish Seth, Mr. Sachin Johri, Mr. Nandan Yalgi

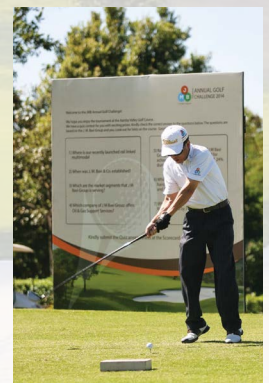
Third Row (L - R) : Cdr. Sunil Dhulekar, Mr. Hari Sankaran, Mr. Dhruv Kotak, Mr. Muniyappa Ramesh, Mr. Chun Kung Chang, Mr. Neil Hsu, Mr. Wu Long Peng, Capt. Sriram Ravi Chander, Mr. R V S Raju, Mr. Jangoo Mistry, Mr. Janesh Gulati,

Fourth Row (L - R) : Mr. Alex Schnitger, Mr. Bill Smart, Mr. Kuok Khooon Kuan, Mr. Ashok Raghavan, Mr. Ramanujan, Mr. Krishna Kotak, Mr. Arunabha Sen, Mr. Hajara, Mr. A K Gupta, Mr. Florent Kirchhoff, Mr. Atul Laul, Mr. Mark D'sa



J M BAXI GROUP

ANNUAL GOLF CHALLENGE 2014



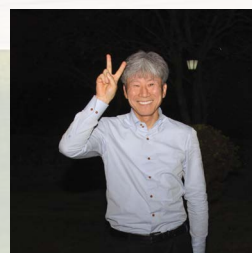
Winner
Mr. Saurabh Sood
GATX



Runner Up
Mr. Sunil Misra
Reliance Industries



Second Runner Up
Mr. Yasuyuki Yuba
JFE Shoji Steel India Pvt. Ltd.



Closest to the Pin
Mr. Jeon Tae Song
Doosan Power Systems India Pvt. Ltd.



Closest to the Bull's Eye
Mr. Wen Yen Fu
China Steel Corporation India Pvt. Ltd.

In Focus

Dredging: Overall India Scenario

Dredging in simple terms as we know is the scooping up, gathering and disposal of excavated materials, like sand, rocks and mud, which is carried out mainly underwater. It is widely used in areas like beaches, rivers, ports, bays, channels, canals, marinas, lagoons, lakes, dams, industrial reservoirs and so on, mainly to achieve the twin objectives of a level water bed and a consistent depth of water, for the safe navigation of ships and vessels.

Modern economies must have efficient entry points for imports and exit points for exports that meet the benchmark standards of international trade where global integration of the supply chain is a compulsory requirement. It is this simple necessity that drives the requirement for gateway ports geared to handle ships of optimum size with correspondingly efficient cargo handling resources and inland connectivity. The best solution for achieving this is naturally to expand and deepen existing ports and to build new larger ones.

Types of dredging

Dredging is usually classified as capital dredging or maintenance dredging. The former is used to develop new ports and involves intensive dredging over a predetermined temporary period to attain the target depth while the latter is carried out periodically at existing facilities to remove the incremental deposition and maintain the required depth.

Capital dredging is the more intensive and expensive exercise since it normally involves not only dredging of sand, silt and mud, but also rock and other hard materials. On occasions, a new port's basin may be partly over land with rocky cliffs and

mechanical excavation accompanied by drilling and blasting become necessary. The challenge increases further when there is limited time to meet the commissioning and commercial targets.

Seasonal siltation in the seas, and the deposition and underwater movement of sediments in rivers, access channels, canals and harbour basins are natural phenomena posing different challenges to existing ports. They can rapidly reduce the depth of water if nothing is done. It necessary for ports to dredge regularly to ensure that the depth of water in their waterways and at berths is maintained at all times so that they remain accessible to shipping traffic. This preventive dredging is more popularly known as maintenance dredging.

Types of dredgers

Dredgers can be broadly separated into two categories – mechanical and hydraulic.

There are a wide variety and types of dredgers, but we have listed below the dredgers used most commonly in Table I.

Class	Type of Dredger
Mechanical	Bucket Ladder Dredger
	Grab Dredger
	Backhoe Dipper
Hydraulic	Suction Dredger
	Cutter Suction Dredger
	Trailing Suction Dredger
Others	Air / Water Lift Dredger
	Augur Suction Dredger
	Pneumatic Dredger
	Amphibious Dredger
	Water Injection Dredger
	Plough or Bed Leveller Dredger

Major dredging contractors

DCI from the public sector was India's largest dredging operator for a long time, but other contractors like Mercator, Adani Group and Krishnaptnam Port are also operational now. However, the largest dredging companies seen in India are from abroad. The important ones are listed:

- Royal Boskalis Westminster (The Netherlands)
- China Harbour Engineering (China)
- Van Oord Dredging & Marine Contractors (The Netherlands)
- DEME (Belgium)
- Jan De Nul (Belgium)
- Rhode Neilsen (Denmark)

Dredging in India to date

Rapid improvements in cargo-handling techniques and the eternal thrust of the growing economy have led to continuous increases in the size of vessels used in international shipping, including India as already mentioned.

All major, minor and private ports in India have relatively shallower depths than their counterparts abroad. Until the early 1990s, all the predominant ports in India were in the public sector and all dredging was carried out by public sector dredging operators as a matter of policy. Since then, following the liberalisation initiative and the emergence of private port operators, GOI appears to have recognised the need to coordinate improvements in dredging as an important component of the sectoral development of ports and shipping.

In addition, the need to dredge national waterways, certain smaller rivers,

In Focus

dams and canals for inland waterway transport is also gaining ground.

The permissible draught level at Indian ports varies from 7 to 17 metres on average compared to the average standard worldwide of 12 to 23 metres. For waterways, research suggests a minimum depth of 2.5 to 3 metres is essential for deriving optimum benefits. Nevertheless, the actual achievement in dredging has not kept pace with demand in India. In the 11th five-year plan, the targets for capital and maintenance dredging were 675.3 million cbm and 430 million cbm respectively; in reality, only 40.29% and 67.82% of these respective targets were achieved.

High capital and maintenance costs, cumbersome clearance procedures, sluggish implementation of port projects, financial and environmental constraints and poor responses from bidders are reported to be some of the major reasons for the poor showing in this sector.

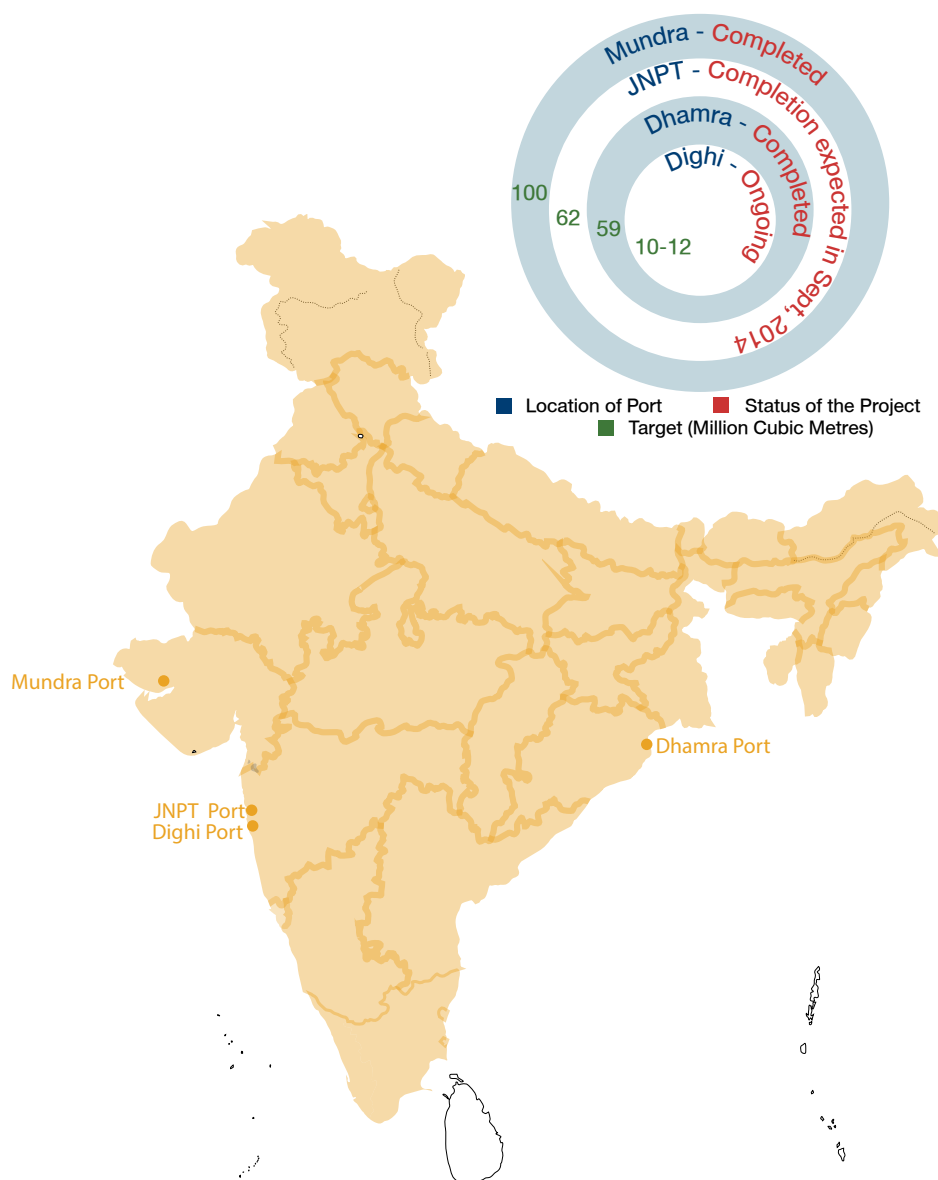
We show in the graphic some of larger dredging projects recently completed, approved or currently underway in Indian ports.

Dhamra Port

This port, located between Haldia and Paradip, commenced operation in 2011 after capital dredging of about 59 million cbm. In 2013-14 so far there has been dredging of 3.7 million cbm (55% approx. of the planned dredging). Further dredging is underway.

JNPT Port

JNPT has undertaken one of the biggest dredging projects in terms of cost and quantity for deepening the common navigation channel of JNPT and Mumbai. This project aims to increase the depth of the channel from 11 metres to 14 metres and has been awarded to Royal Boskalis.



Mundra Port

A capital dredging project for the west basin of the port was undertaken by the port's in-house dredging arm. The objective of the project was to create a deepwater terminal for coal and dry bulk commodities with a navigation draught of 16 metres for 17 berths.

Dighi Port

Of the five berths planned in Phase-1, the last three are due to be commissioned in 2014 and the dredging work is to create a draught of 16 metres ■

to be continued in Issue VI.....

Weights & Measures

Wheat: Will India Up Its Ante In The Global Supply Chain?

Wheat is one of the most important traded commodities in the cereals value chain. It has the largest share of the total cereal production of about 698 million tonnes (2013-14), with 142 million tonnes traded globally. The Middle East and North Africa account for the major share of imported wheat. Of the largest producers of wheat, China (125 million tonnes) and India (95 million tonnes) are also among the largest of consumers, while Argentina, Canada, Australia, Kazakhstan, the US, and Russia, are surplus producers that lead the global wheat trade.

India has entered the global wheat market with output now exceeding consumption. The current wheat surplus, after meeting reserve requirements, was 4 to 5 million tonnes in 2014. India's grain output has grown rapidly, with significant support from public procurement policy, Minimum Support Price (MSP) and strategic food grain reserves. The Ministry of Agriculture estimates India's production of food grains at 257.44 million tonnes in 2012-13, surpassing the 250.14 million tonnes produced in 2011-12. India's food grain output for 2013-14 will be 263 million tonnes which is again set to break the record.

The growth is mainly due to the increased acreage used for wheat cultivation (about 21 million hectares) and higher farm productivity due to hybrid seeds, and more irrigation and mechanisation, which take yields closer to global averages. India has an average yield of 2.9 tonnes per hectare against the global benchmark of 3.0 tonnes per hectare. There have also been significant improvements in primary processing activities like grading, sorting, packaging and

certification. Much needs to be done though to improve the post-harvest value chain, with proper warehousing and efficient rail and road movement of wheat from procurement points in north India to consumption and trade exit points. Presently, wastage from poor storage, pilferage etc. has a significant negative effect. Higher production and productivity, switch-over to better grades of wheat (like hard durum wheat), greater competitiveness through trade in value-added wheat products, improved global market trade access through removal of non-tariff barriers etc. will help enhance India's leverage in the global wheat economy.

India's position in the global grain trade has lately drawn some attention, including at the recent WTO meeting at Bali because of state subsidies, price support through public procurement and policy on grain reserves. India has, however,

won a temporary exemption for four years from any discriminatory action based on its current food security policy. It has argued that given its high consumption of food grains, its food policy is geared at maintaining stability and balance in its food supply and distribution systems. According to data compiled by the US Department of Agriculture (USDA), Indian per capita grain consumption is 178 kg against 1046 kg in the US. Even at this relatively low per capita consumption of food grains, there has been a huge increase in demand of about 220 million tonnes with projected domestic output of 263 million tonnes (2013-14). Meeting this high consumption was itself, therefore, a key milestone towards achieving a stable agricultural market in India. While there is obviously, growing pressure for India to open up its grain markets, India's gambit for raising its ante in the global grain supply chain can hardly be simplified to merely dismantling regulatory systems that have actually helped India gain food self-sufficiency ■

WHEAT HANDLING BY PORT

(Qty in Metric Tonnes)

	2011	2012	2013
KANDLA	251,000	100,807	100,356
MUNDRA	91,000	975,000	776,000
VIZAG	-	-	32,000
PIPAVAV	-	122,000	43,000
MORMUGAO	-	-	32,000
MANGALORE	-	-	3,000
K'PATINAM	-	-	38,000
KOLKATA	-	1000	25,000
KARAIKAL	-	-	3,000
KAKINADA	-	96,000	409,000
GANGAVARAM	-	-	28,000
CHENNAI	-	123,000	312,000
TOTAL	342,000	1,417,807	1,801,356

The data are for a calendar year.

Port Statistics

SHIPPING & CARGO PERFORMANCE

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

OCTOBER - DECEMBER 2013 (IIIrd QUARTER) / APRIL 2013 - DECEMBER 2013

AGRICULTURAL PRODUCTS

	SUGAR		SOYAMEAL		WHEAT		RICE		MAIZE	
	III rd Qtr	Apr'13-Dec'13	III rd Qtr	Apr'13-Dec'13	III rd Qtr	Apr'13-Dec'13	III rd Qtr	Apr'13-Dec'13	III rd Qtr	Apr'13-Dec'13
No. of Ships called	9	19	24	45	6	61	22	94	6	74
Total Cargo Handled	0.157	0.368	0.358	0.705	0.170	1.824	0.316	2.035	0.045	1.167
Inbound	0.044	0.124	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000
Outbound	0.114	0.244	0.358	0.705	0.170	1.824	0.316	2.035	0.045	1.167

FINISHED FERTILIZERS & FERTILIZER RAW MATERIALS

	UREA		SULPHUR		ROCK PHOSPHATE		DAP		MOP	
	III rd Qtr	Apr'13-Dec'13	III rd Qtr	Apr'13-Dec'13	III rd Qtr	Apr'13-Dec'13	III rd Qtr	Apr'13-Dec'13	III rd Qtr	Apr'13-Dec'13
No. of Ships called	41	116	15	40	41	121	16	72	23	72
Total Cargo Handled	1.960	5.312	0.374	0.925	1.852	4.656	0.575	2.93	0.618	2.014
Inbound	1.960	5.312	0.374	0.875	1.852	4.656	0.575	2.93	0.618	2.014
Outbound	0.000	0.000	0.000	0.051	0.000	0.000	0.000	0.000	0.000	0.000

COAL

	THERMAL COAL		COKING COAL		MET COKE		PET COKE		ANTHRACITE COAL	
	III rd Qtr	Apr'13-Dec'13	III rd Qtr	Apr'13-Dec'13	III rd Qtr	Apr'13-Dec'13	III rd Qtr	Apr'13-Dec'13	III rd Qtr	Apr'13-Dec'13
No. of Ships called	159	455	160	391	26	63	20	52	7	25
Total Cargo Handled	7.976	22.495	8.340	20.66	0.771	1.794	0.675	1.818	0.158	0.787
Inbound	2.744	7.736	8.325	20.638	0.771	1.794	0.376	1.132	0.158	0.518
Outbound	5.232	14.758	0.015	0.022	0.000	0.000	0.299	0.759	0.000	0.269

STEEL & RELATED ORES

	STEEL PRODUCTS		SCRAP METAL		CHROME		MAGNESIUM ORE		IRON ORE	
	III rd Qtr	Apr'13-Dec'13	III rd Qtr	Apr'13-Dec'13	III rd Qtr	Apr'13-Dec'13	III rd Qtr	Apr'13-Dec'13	III rd Qtr	Apr'13-Dec'13
No. of Ships called	207	630	0	6	7	10	15	36	182	370
Total Cargo Handled	2.223	6.02	0.000	0.147	0.068	0.153	0.294	0.74	8.369	18.818
Inbound	0.892	3.005	0.000	0.147	0.001	0.001	0.294	0.74	2.075	5.793
Outbound	1.331	3.015	0.000	0.000	0.067	0.152	0.000	0.000	6.294	13.015

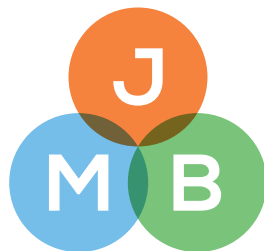
VESSEL & FREIGHT TRAFFIC BY PORTS

OCTOBER 2013 - DECEMBER 2013 (IIIrd QUARTER) / APRIL 2013 - DECEMBER 2013 (QTY IN MILLION TONNES)

Ports	Types of Ports	NO. OF SHIPS		LIQUID CARGO		BULK CARGO		CONTAINERS (TEUs)		TOTAL CARGO *	
		III rd Qtr	Apr'13-Dec'13	III rd Qtr	Apr'13-Dec'13	III rd Qtr	Apr'13-Dec'13	III rd Qtr	Apr'13-Dec'13	III rd Qtr	Apr'13-Dec'13
Kandla	■	146	763	0.825	4.703	2.236	11.562	-	29,419	3.062	16.267
Mumbai	■	473	1293	3.629	9.525	3.674	7.249	10,357	29,705	7.562	17.504
Nhava Sheva	■	122	384	1.268	4.306	0.231	0.588	971,238	3,032,243	1.499	4.897
Mormugao	■	107	258	0.256	0.474	2.636	6.076	-	-	3.045	6.834
Mangalore	■	284	842	5.813	18.634	3.281	9.748	11,707	37,068	9.099	28.417
Cochin	■	166	451	3.279	11.319	0.414	0.916	85,926	264,303	3.694	12.268
Tuticorin	■	191	548	0.509	1.207	4.681	13.088	116,615	368,554	5.268	14.686
Chennai	■	283	822	3.071	11.107	1.923	5.972	356,660	1,112,138	5.129	17.537
Ennore	■	193	526	0.730	1.833	6.014	16.944	-	-	6.802	18.923
Vishakhapatnam	■	171	496	1.303	3.778	4.330	12.128	68,248	199,414	5.806	16.132
Paradip	■	372	1157	4.994	15.729	12.780	38.011	-	-	17.789	53.814
Haldia	■	333	547	1.725	4.193	2.877	7.227	27,430	86,931	4.617	11.472
Kolkata	■	30	125	0.012	0.062	0.099	0.364	105,602	343,834	0.148	0.518
Gangavaram	■	28	132	0	0	2.501	9.707	-	-	2.502	9.712
Pipavav	■	97	249	0.011	0.028	1.356	4.167	193,729	500,330	1.371	4.202
Mundra	■	288	854	5.977	17.441	12.000	36.551	646,184	1,688,097	18.005	54.046
Dahej	■	126	383	4.295	13.472	1.990	7.299	-	-	6.285	20.889
Hazira	■	27	88	0.917	2.792	0.635	1.946	29,970	63,012	1.552	4.743
Navlakhi	■	126	171	0	0	1.257	3.372	-	-	1.257	3.372
Kakinada	■	155	589	0.559	1.524	2.217	9.628	-	-	2.821	11.298
Total Vessel Calls at all ports		3,718	10,678	39.173	122.127	67.132	202.543	2,623,666	7,755,048	107.313	327.531

■ Major Port ■ Non-Major Port

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



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