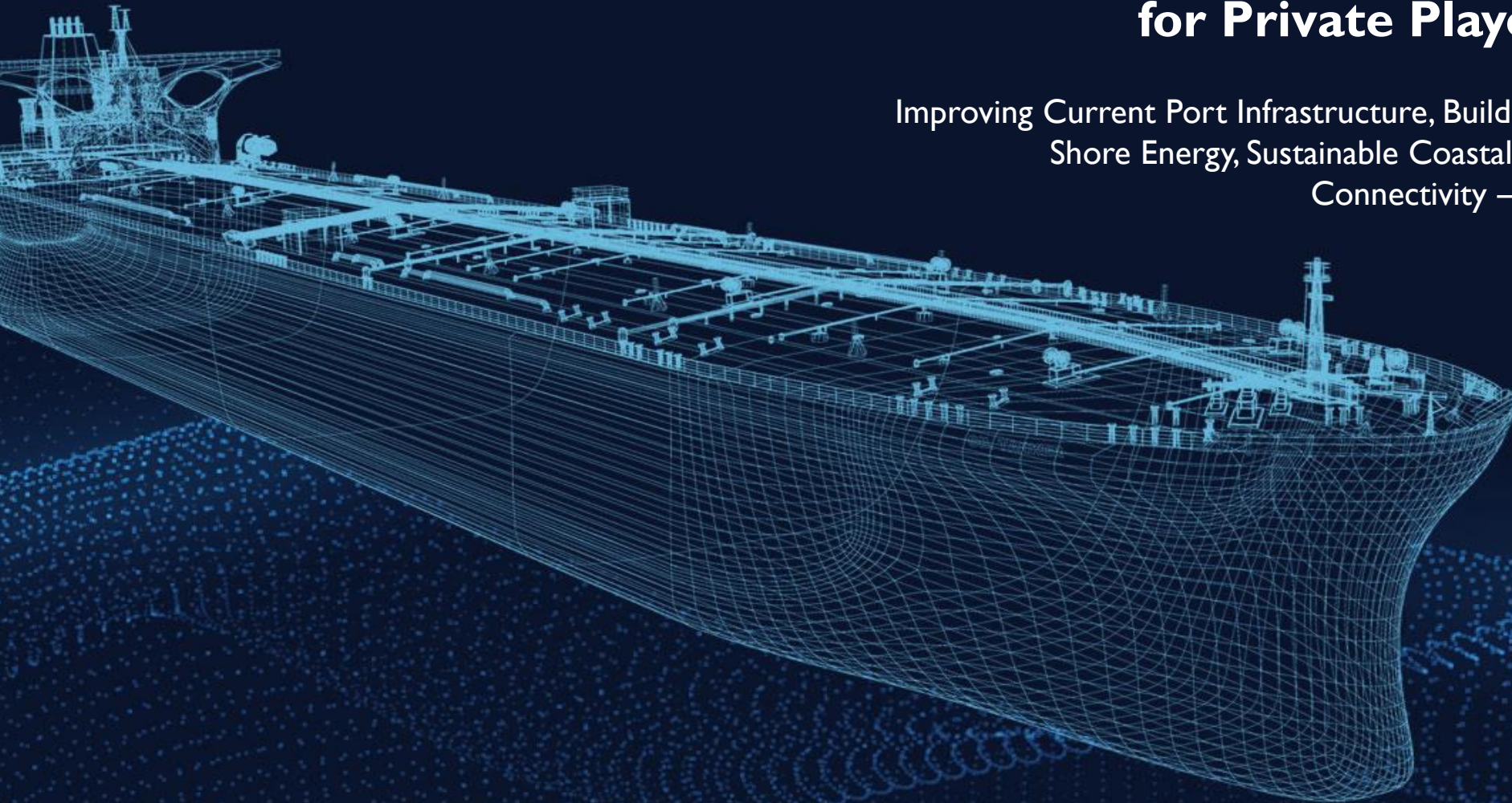


# Blue Economy Market Opportunities for Private Players in India

Improving Current Port Infrastructure, Building New Ports, Off  
Shore Energy, Sustainable Coastal Development and  
Connectivity – Outlook Till 2030



**Government of India is targeting to develop 25 new ports worth INR 7.7 Billion by 2025 under National Infrastructure Pipeline (NIP). Additionally, 58 projects involving a cost USD 6.6 Billion have been identified as part of the NIP for infrastructure augmentation and development at major ports up to 2025**

Maritime India Vision, envisions an overall investment of INR 3 - 3.5 Lacs Crores across ports , shipping and inland waterways categories by 2030.

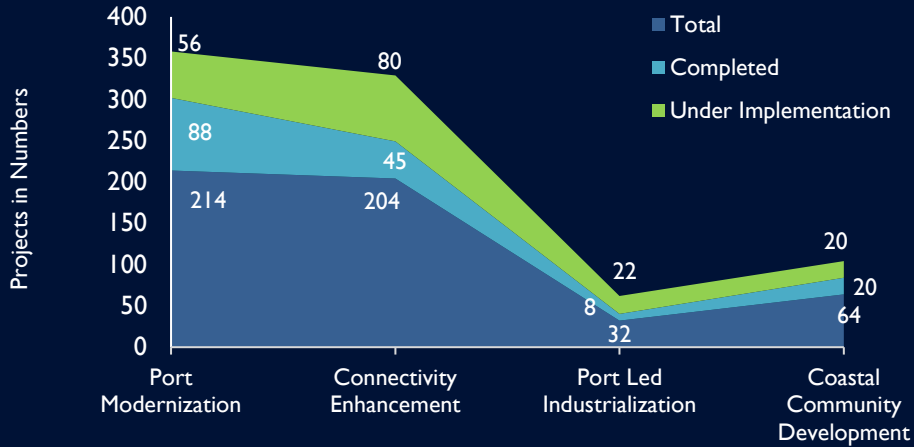
India's growing infrastructure need has made it quintessential to develop the transport system to full capacity. Logistics infrastructure covering the road, rail, waterways & air network of a country is the backbone on which the nation marches northbound . Although, the urgency to develop India's logistics infrastructure has been realized well by the Indian government, as many development targets have been rolled out over the past decade. But the task at hand is daunting and needs participation from the deep pocketed players to lift the plans to reality. Since, a large part of India's future logistics network capacity is still to be built, the country has great potential to build infrastructure optimally to meet the growing demand. Doing so requires an integrated and coordinated approach in which the development of each mode – railways, waterways and roads is matched to the needs and existing assets are better utilised.

Maritime sector plays a vital role in strengthening logistics infra and to shape the maritime prowess , varied initiatives have been taken by the Indian government to encourage the port led development. Sagarmala, Bharatmala, National Infrastructure Pipeline, developing coastal economic zones (CEZ), coastal economic units (CEUs) and many more likewise are some of the major steps taken by the government in this regards. It is significant to note that as a part of Sagarmala Programme, more than 500 projects at an estimated cost of around INR 3.59 Lakh crore have been identified for implementation till 2035 .Sagarmala projects includes projects from various categories such as modernisation of existing ports and terminals, new ports, terminals' Ro Ro & tourism jetties, enhancement of port connectivity, inland waterways, lighthouse tourism, industrialization around port, skill development, technology centres, etc. These projects are broadly classified into four pillars of Sagarmala. Implementation of the projects under Sagarmala is to be done by the central line ministries, state maritime Boards, Major Ports and SPV preferably through the private sector and through public private Partnership (PPP) wherever feasible.

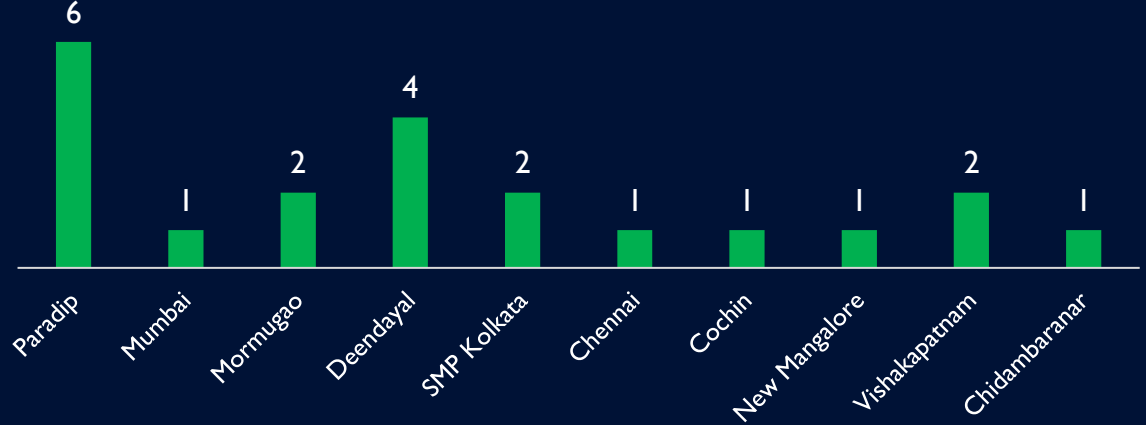
The Government of India has also taken concerted efforts in the direction of expansion and modernization of major ports of the country. India anticipates a growth of over 3 to 3.5-fold in the port freight traffic by 2030 which indicates a plethora of opportunities for value chain across port modernization/mechanization, capacity expansion, new ports, warehousing , logistics & industrial development. Infrastructure development and capacity augmentation of major ports is an ongoing process. It involves construction of new berths and terminals, mechanization of existing berths and terminals, capital dredging for deepening of drafts for attracting large vessels in port channels, development of road and rail connectivity etc. As a result, the cargo handling capacity of the major ports has gone upto 1534.91 Million Tonnes Per Annum(MTPA) as on 31st March 2020.

# Exhibit 01: Current Development Status of Key Ports in India

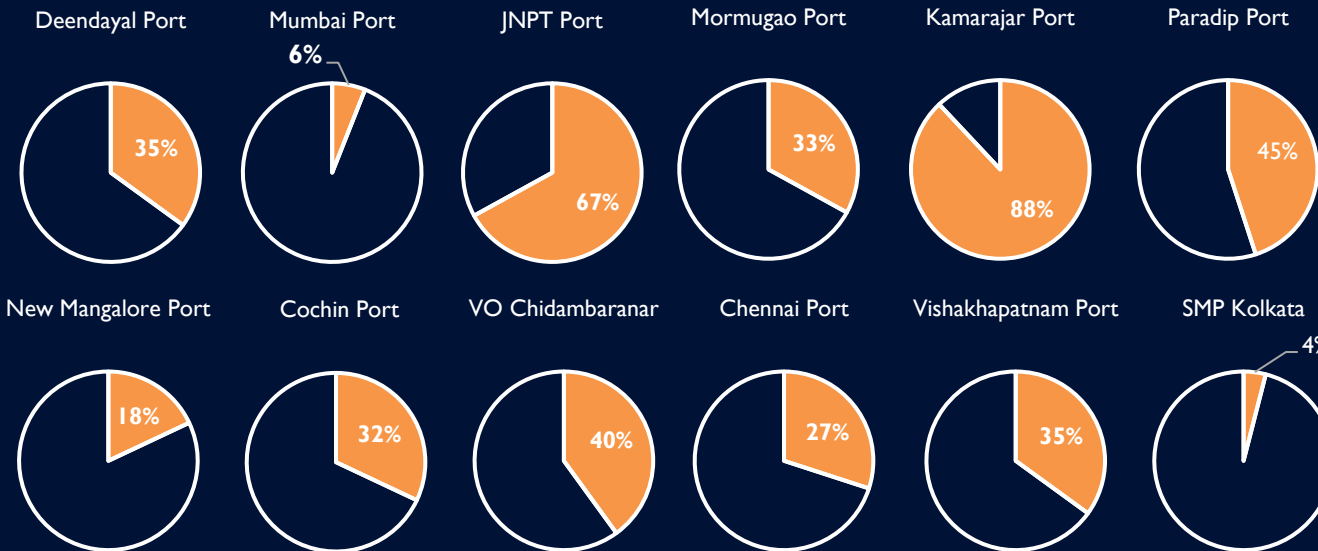
## Development Summary of Projects Under Sagarmala



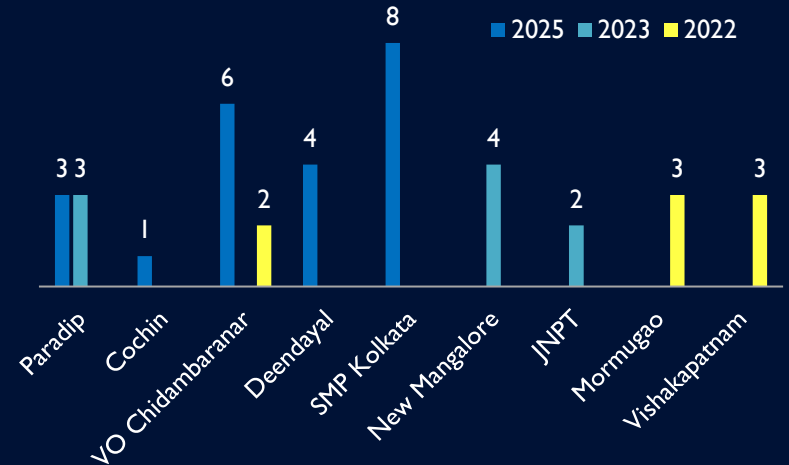
## Mechanization of Berths Across Major Ports in Phase I



## Percentage of PPP/Captive Berths at Key Indian Ports



## Upcoming Berths (In Numbers) Across Key Indian Ports under Landlord Model Till 2025





## Key Signpost – Port-led industrialization would help realise a revenue of over INR 10,000 crore for major ports, while generating a cost savings of INR 20,000 crore

Accordingly, Vishakhapatnam Port Trust has also developed plans with investments from private sector in addition to the investments from internal resources in the major thrust areas of “deepening of channels and berths. The current capacity of Vishakhapatnam Port Trust(VPT) is 126.89 million tonnes. To encourage the participation of private players in developing ports infra of the country, Maritima India Vision 2030 envisions an overall investment of INR 3-3.5 Lac Crores across ports, shipping and inland waterways categories. The vision roadmap is estimated to aid unlock over INR 20,000 crore worth of potential annual revenue for Indian ports. Further, an investment of INR 1-1.25 Lac Crores has been planned in augmenting the infrastructure of major ports in India with developing mega city ports in high potential areas of Gujarat, Maharashtra and Odisha – West Bengal Cluster at an investment of over INR 80,000 crores. The government plans to increase the trans shipment volumes of Indian cargo at Indian ports from 25 per cent in 2020 to more than 75 per cent by 2030 by operationalisation of Vizhinjam port and development of trans shipment zone in Kanyakumari and Champbell Bay. Initiatives to enhance Ease of Doing Business are planned under it which include implementing Enterprise Business System (EBS) to simplify and digitize processes across Major Ports by 2021, developing National Marine Logistics Portal to implement 100 % paperless processes including online payment and implementing unified ship e-registration portal.



What’s our difference margin for market research?



### 1 Our Market Research Coverage Range

- Evaluating opportunities for private players in developing ports infrastructure till 2030
- Evaluating opportunities for private players in developing CEZs and CEUs till 2030
- Examining the opportunity for private players in developing multimodal logistics and transport parks near ports till 2030
- Examining opportunity for private players in ship building and ship repair till 2030
- Examining opportunity for private players in LNG transportation till 2030



### 2 Our Market Research DNA & Team of Domain Specialists

- We boast a highly qualified and experienced team of market research professionals having experience of working in top companies across different domains
- Our focus on nurturing industry connect is paramount which helps us generate high quality robust market feed which is filtered and sourced through from different levels
- Any market research report follows strict turn-around-time procedures with cross-vetting from our Knowledge Grid Experts which adds immense value to our research credentials for the deemed subject



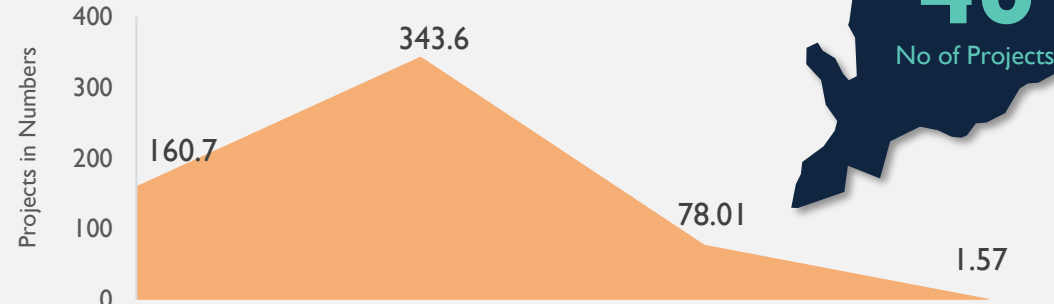
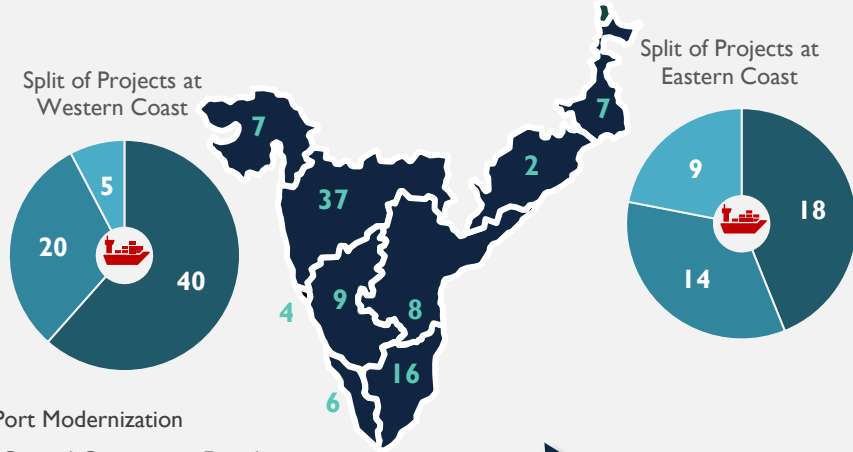
### 3 Our Satisfied Patrons and Retention rate of over 97.6% on yoy basis

We have been bestowed with a phenomenal client retention rate and many satisfied clientele. Our client’s have been from wide variety of industry domains and from different geographic locations across the globe. Eninrac consulting is a trusted market research partner and an objective resource augmenting value for more than 257+ Group companies & 1000+ organization across 40+ countries.

# Exhibit 02: Investment Opportunity in Few Coastal States for Ports Development

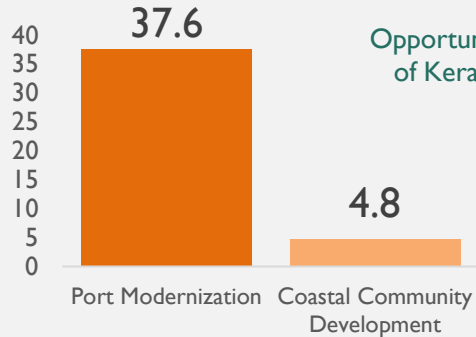
Upcoming Projects for Development of Small Ports

Cumulative Opportunity in the State of Odisha under Sagarmala

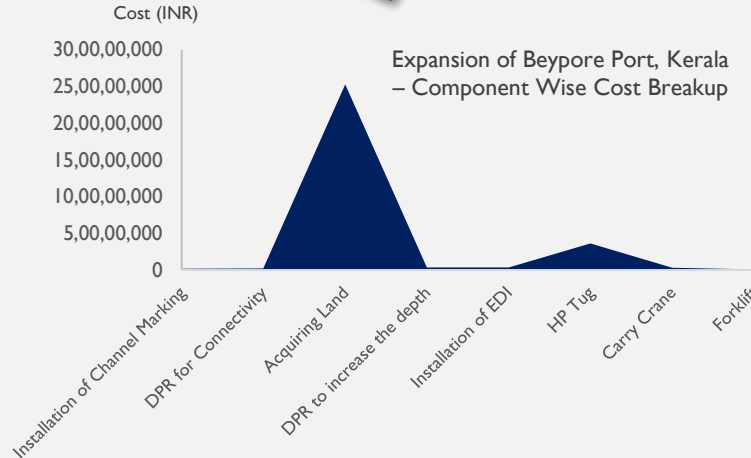
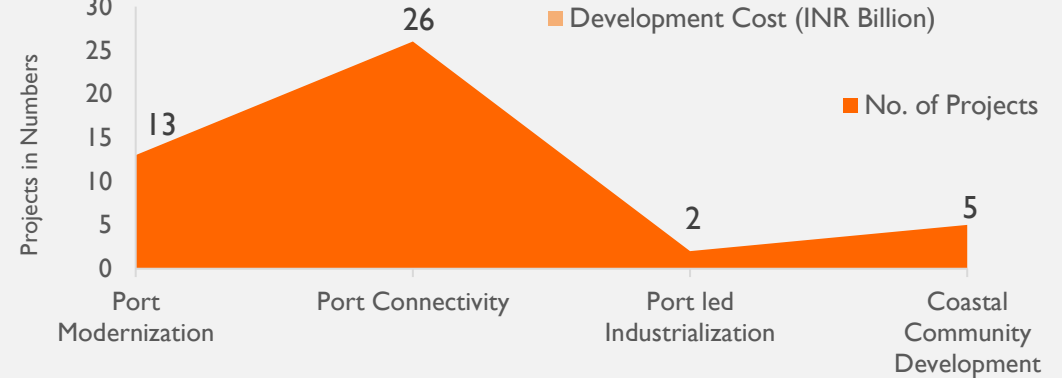
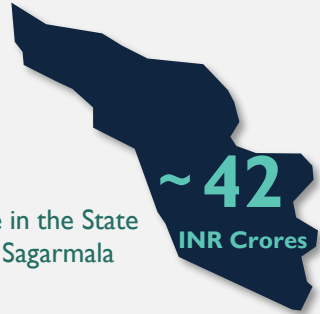


- Port Modernization
- Coastal Community Development
- Port Connectivity

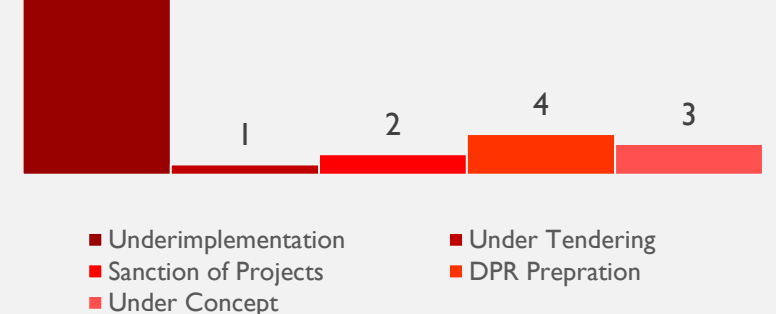
Opportunity Breakup (INR Crores) in the State of Kerala



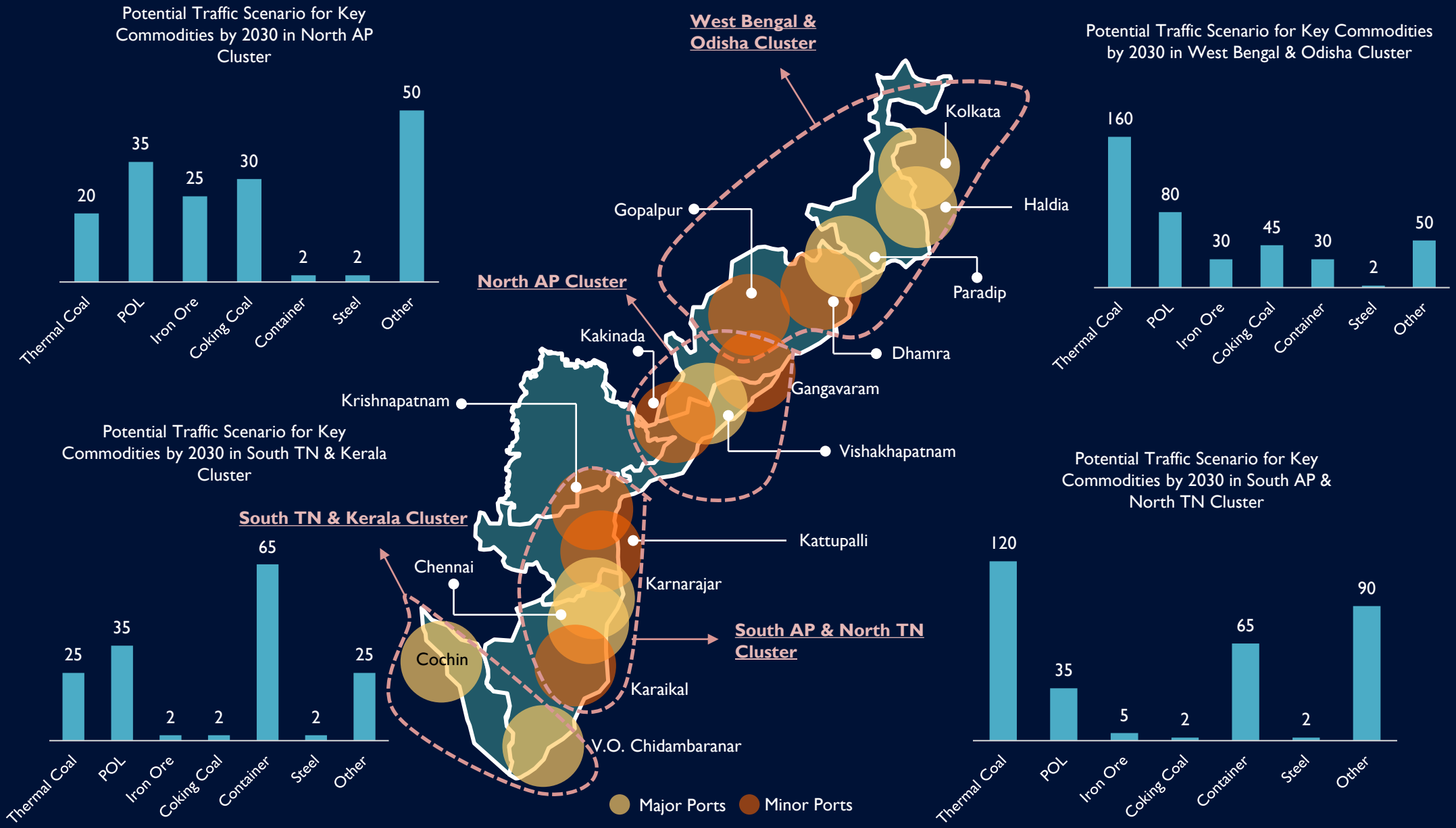
Opportunity Tune in the State of Kerala under Sagarmala



Upcoming Port Development Projects (In Numbers) in Odisha under Varied Categories



# Exhibit 03: Key Port Clusters Along Eastern Coastline in India and the Potential Traffic Scenario for Key Commodities



Source: Ministry of Ports Shipping & Waterways, Maritime Vision 2030 India, Eninrac Research



## Contents & Coverage – Blue Economy Market Research

### 01 Ports and Shipping Industry in India – Current Scenario & Impact of COVID 19

This section shall cover the current scenario of ports and shipping industry in India. Development status of projects under Sagarmala, status track of India's ship building and repair industry, impact of covid 19 and likely recovery

### 04 Inland Waterways & Development Track

State wise development track of national waterways in India, status track of cargo handled at these national waterways by commodities and major shippers/vessel operators and cost comparison of inland waterways with different transportation modes

### 07 Opportunity Track for Private Players in Port Connectivity & Logistics Till 2030

This section tracks opportunity assessment for players in developing port connectivity via road, rail and airport. Examining PPP opportunities for developing multi modal logistics and transport hubs. Examining partnership opportunities for players in providing material handling, warehousing/cold storage and transportation

### 10 Overview of Ship Building & Repair Industry in India – Status Track Till 2030

This segment covers overview of shipbuilding market in India by type, size and company. Active players in ship building and their vessel wise order book. Ship repair facilities in India – company wise for dry & wet docks, company wise other facilities & ship repair facilities at major ports

### 02 Overview of Ports Infrastructure in India – Status Track in 2030

This section covers region wise overview of existing port infra, capacity & utilization status of ports and traffic handled at the major and minor ports in the country

### 05 Opportunity Track for Private Players in Port Infra Modernization & Development Till 2030

Examining PPP opportunities in developing new coastal ports, region wise assessment of strategic locations/ports capturing international opportunity. Assessing opportunity in port efficiency improvement and capacity expansion

### 08 Oil and Gas Transportation in India and Outlook Till 2030

Current status of LNG availability in India till 2021. Status track of POL/crude oil transportation infra in India till 2021. Opportunity examination in capacity expansion plans of existing terminals and developing new ones till 2030

### 11 Outlook of Ship Repair & Building Industry in India Till 2030

Outlook of ship building capacity in India till 2030, ship repair capacity in India till 2030 and examination potential locations to set up ship repair centers of excellence

## Blue Economy Market Opportunities for Private Players Outlook Till 2030

### 03 Regulatory & Policy Track Associated to Ports and Shipping Segment in India

This chapter tracks key policies- ports bill 2020, major ports bill , recycling of ships act, national logistics policy, Sagarmala & inland waterways development

### 06 Opportunity Track for Private Players in Port Led Industrialization Till 2030

Examining opportunity for players planning to invest under energy industry clusters, opportunity for players under bulk material clusters, assessment of business case for players under discrete manufacturing etc

### 09 Expansion of Existing Ports (Major & Private Ports) Infra and Outlook Till 2030

Port wise likely expansion in the terminals by 2030, Port wise likely expansion in the capacity handled & utilization by 2030. Port wise likely expansion in the traffic handled by 2030

### 12 Tracking upcoming projects across ports and shipping industry in India

Region wise track of underconstruction , proposed and planned projects – new ports, capacity expansion projects, modernization of ports, port led industrialization, port led connectivity, port led logistics, ship building & repair, port smart cities and coastal community development



### Key Highlights for Market Research on Blue Economy Opportunity Assessment for Private Players

1. Region wise opportunity assessment for players in expanding and modernizing ports infra till 2030
2. Region wise examination of strategic locations/ports capturing international opportunity till 2030
3. Region wise examination of strategic locations/ports in the proximity of industrial clusters till 2030
4. Region wise opportunity assessment for players under energy industry clusters till 2030
5. Region wise opportunity assessment for players in developing logistics parks & transport corridors till 2030
6. Region wise opportunity assessment for players for improving port connectivity till 2030
7. Region wise opportunity assessment for players developing multi modal logistics & transport hubs till 2030
8. Opportunity assessment for players in developing new LNG transportation terminals till 2030
9. Market assessment of ship repair and building in India and outlook for private players till 2030



### Differentiating Insights for Market Research on Blue Economy Opportunity Assessment for Private Players

1. Examining opportunities for private players in developing new coastal ports
2. Examining opportunities for private players in developing port modernization
3. Examining opportunities for private players in encouraging port led industrialization
4. Opportunity assessment for private players in developing national inland waterways and their ports infra
5. Opportunity assessment for private players in developing logistics parks and transport corridors
6. Opportunity assessment for private players in developing warehouses near port proximity
7. Opportunity assessment for private players in developing maritime clusters near port proximity
8. Opportunity examination for private players in LNG transportation
9. Examining potential locations in India to set up ship repair & building centers of excellence
10. Examining region wise track of under construction, proposed and planned projects across ports & shipping industry in India





## Must Buy For

- EPC Players
- Private Port Developers
- Port Development Authorities
- End to End Service Providers for Port O&M
- Ship Building Players
- Ship Repair Players
- Oil Marketing Companies (OMCs)
- Logistics Players
- Warehousing & Cold Storage Players
- Industries in Coastal Economic Zones
- Smart Cities Developers
- Investment Banks
- Funding Bodies



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## Companies Mentioned

- Adani Ports and SEZ
- Gammon India
- GVK Power & Infrastructure
- Larsen & Toubro
- IL&FS
- Afcons Infrastructure Limited
- DS Constructions
- Tata Projects
- HCC
- Submarine Kakinada Ltd
- NN Shipyards and Engineers Ltd
- Mech Marine Shipyard
- Mandovi Drydocks Limited
- Zoom Developers
- L&T Shipbuilding
- ABG Shipyard
- Pipavav Defense and Offshore Engineering Company Ltd



Truth is ever to be found in the simplicity, and not in the multiplicity and confusion of things

- Sir Isaac Newton



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