India Port Industry Investment Research Report, 2016-2019

Description: India ports have no outstanding fame in the history. For years they have generally been impressed of inefficiency and poor infrastructure. On the contrary, China has vast, state-of-the-art range of facilities available along China's coastline. But it is the time of India ports to bloom. Indeed, many state-owned port facilities in India still in a rudimentary stage, the country's private ports are now substantial to match their rivals in China.

Although the two countries have a similar populations base, India's port throughput capacity is only around 8% of that China's. However growth in China is slowing as the economy is recalibrated towards services and consumption. Container throughput growth at China's major ports fell from 3.3% in 1H15 to 2.3% in 1H2016. At the same time, India achieved fast growth with a 6.9% increase in throughput in 1H16 versus a 4.3% increase in 1H15. Moreover, the growth was much higher at some private ports.

State owned ports in India are classified as 'Major ports'. For example, Jawaharlal Nehru Port Trust in Maharashtra, which is India's largest container port. The private ports, such as GPPV and ADSEZ, are categorized as 'Minor ports'. This is exactly where the growth is. India's private ports' overall market share has grown from 24% in 2005 to 45% in 2016, and they will continue to grow while their rivals are obstructed by tariff regulations and capacity constraints. ADSEZ's throughput has risen at a CAGR of 29% in the last decade and at a CAGR of 14% at GPPV, far ahead of the 4% at state-owned 'Major ports'.

Port throughput in India is set to grow at an even faster pace over the next few years. In the short term, India is enjoying the best monsoon rains in many years, which would most probably increasing agriculture exports. Higher disposable incomes, buttressed by a pay rise for millions of civilian servants, will likely increase domestic consumer demand. In a longer term, “Make in India” strategy aims to boost the share of manufacturing to 25% of GDP by 2022 from 18% now, which includes improving infrastructure and creating freight and trade corridors.

This report is mainly concerned with the following:

- Detailed comparison of India's port sector with other regions in terms of tariff regulation and vertical integrated business model.
- This report compares listed Indian port companies with global listed peers on operating metrics, financial metrics.
- Summarized the development of foreign port operators in India.
- This report identifies the drivers of India ports.

Contents:

1 Executive summary
2 Operating Environments of Chinese Food Safety Testing
   2.1 Overview
   2.2 The five drivers of port in India
   2.3 Comparison between Indian ports and global peers
   2.4 Competitive Landscape
3 Analysis of Segments
   3.1 Container terminal industry
      3.1.1 Overview
      3.1.2 Location
      3.1.3 Regulatory
      3.1.4 Competition
      3.1.5 Infrastructure
      3.1.6 Port cost base and ownership structure
   3.2 Bulk (dry and liquid) terminal industry
      3.2.1 Overview
      3.2.2 Location
3.2.3 Competition
3.2.4 Cargo mix
3.2.5 Infrastructure
3.2.6 Surplus capacity
3.3 Regional Comparison
3.4 Major ports vs Minor ports

4 Major Port Operators in India
4.1 Adani Ports and Special Economic Zone (ADSEZ)
4.1.1 Profile
4.1.2 Operation
4.1.3 Customer base
4.1.4 Cost Analysis
4.1.5 Outlook
4.2 Gujarat Pipavav (GPPV)
4.2.1 Profile
4.2.2 Operation
4.2.3 Cost Analysis
4.2.4 Outlook
4.3 Other Operators in India
4.3.1 PSA International
4.3.2 DP World India
4.2.3 APM Terminals

5 Industry Outlook
5.1 One of the fastest growing market
5.2 Foreign Trade of India
5.3 Short-term trade outlook
5.4 Long-term trade outlook
5.5 Policy initiatives
5.6 The Sagarmala project
5.7 Trans-shipment business
5.8 Major Indicators Outlook
5.8.1 Port
5.8.2 Container
5.8.3 POL
5.8.4 Coal

Figures and Tables:
India's port growth by commodity, 2005-2015
India's port mix by commodity, 2015
India's port mix by ports, 2015
India container throughput in the global context
Drivers of port industry in India
Indian private ports' comparison with global peers
Port growth comparison, China, India and Global (Container), 2005-2015
Port growth, India vs China, 2005-1H2016
Country port throughput to population ratio, 2014
India vs China port at a glance
Comparison of concession structures of global port operators
Global ports consolidated throughput growth
Terminal handling charge comparison of India container ports
Revenue per TEU of global container ports
EBITDA margin of global container ports
Net debt to EBITDA of Major Ports in India
Interest coverage of Major Ports in India
Global port operators comparison, 2015
Container cargo market share in India
POL cargo market share in India
Dry bulk cargo market share in India
Global trade growth by commodity, 1995-2015
Types of terminals by cargo mix
Manufacturing cluster in India
Distance between ports and key northern Indian cities
HHI index: JNPT, Pipavav and Mundra, 2010-2016
Container terminals utilization level, 2007-2016
India container ports utilization rate, 2016
India major ports' entrance channel depth
Major ports actual evacuation mode
Major ports optimal evacuation mode
Average turnaround time of Major Ports
Average pre berthing time of Major Ports
Overview of major container ports in India
Overview of major bulk ports in India
India's economy/industry by geography
India's port throughput by geography
Indian railway's network utilization level
Classification of Indian ports
Comparison of India's Major ports and Minor ports
Major ports and Minor ports in India
Market share of Major ports vs Minor ports in India, 1998-2015
Capacity addition progress for Major ports (MMTPA)
Adani Group business structure
Ownership structure of ADSEZ
Expansion history of ADSEZ
Summary of Mundra Port terminals
Logistics services revenue of ADSEZ, FY2010-2016
Key assets for ADSEZ's logistics segment
Infrastructure development of ADSEZ
Consolidated net assets breakdown of ADSEZ by entity, FY2016
Consolidated profit breakdown of ADSEZ by entity, FY2016
Loans and advances breakdown of ADSEZ, FY2011-2016
Loans and advances as % of debts, FY2011-2016
Throughput by commodity of ADSEZ, FY2016
Operating revenue composition of ADSEZ, FY2016
ADSEZ customer base
Costs breakdown of ADSEZ, FY2016
Operating expenses breakdown of ADSEZ, FY2016
Royalties payable/revenue share of ADSEZ
Throughput forecasts by segments of ADSEZ, FY2014-2019e
Revenue forecasts ADSEZ, FY2014-2019e
Revenue drivers of ADSEZ, FY2016-FY2019e
Ownership structure of GPPV
Maersk Line's contribution to GPPV's revenue, FY2006-2016
USDINR vs EBITDA margin of GPPV, FY2006-2016
Container terminal capacity comparison
Operating costs breakdown of GPPV, FY2016
Direct costs breakdown of GPPV, FY2016
GPPV share of total volume, FY2016
Throughput composition of GPPV, FY2010-2016
Revenue drivers of GPPV, FY2016-2019e
Inland container movement of JNPT, FY2008-2015
Container terminals in India of PSA International
Container terminals in India of DP World India
Container terminals in India of APM International
EXIM per capita vs GDP of major Asian countries
EXIM composition (by value) of major Asian countries
Global container trade and GDP growth, 1990-2016e
India port throughput vs GDP growth, FY2005-2015
India container throughput vs GDP growth
India's export composition by commodity, FY2016
India's export composition by regions, FY2016
India's import composition by commodity, FY2016
India's import composition by regions, FY2016
India's overseas cargo throughput vs EXIM value, FY2005-2016e
India's monthly export growth by USD, June2014-June2016
India's monthly import growth by USD, June 2014-June 2016
India Manufacturing PMI, June 2014-June 2016
India Major ports' throughput growth, May 2015-July 2016
Drivers of India's long-term future trade growth
India's containerisation rate, FY 2004-2015
Containerisation rate across Asia
Expected commissioning dates of various sections of the Eastern and Western Dedicated Freight Corridors
Dedicated Freight Corridor and the Delhi-Mumbai Industrial Corridor area
India and China's share of global goods exports
Coastal shipping of India by commodity
India's freight modal mix, FY 2015
India's port EXIM vs coastal throughput, FY 2016
CAGR of India's port throughput, FY 2006-2019e
India's port throughput growth forecast by commodity, FY 2012-2019e
India's port throughput growth forecast
India's container throughput forecast, FY 2005-2019e
India crude oil supply, FY 2005-2016
India POL traffic vs EXIM growth, FY 2006-2016
India refinery capacity additions (MTPA) by companies, 2017-2018e
India's coal production and imports
India's port coal throughput forecast, FY 2008-2019e
Modal mix of domestic coal freight in India
Operating cost of transport modes in India

Ordering:
Order Online - [http://www.researchandmarkets.com/reports/3843319/](http://www.researchandmarkets.com/reports/3843319/)
Order by Fax - using the form below
Order by Post - print the order form below and send to
Research and Markets,
Guinness Centre,
Taylors Lane,
Dublin 8,
Ireland.
Fax Order Form
To place an order via fax simply print this form, fill in the information below and fax the completed form to 646-607-1907 (from USA) or +353-1-481-1716 (from Rest of World). If you have any questions please visit http://www.researchandmarkets.com/contact/

Order Information
Please verify that the product information is correct and select the format(s) you require.

Product Name: India Port Industry Investment Research Report, 2016-2019
Web Address: http://www.researchandmarkets.com/reports/3843319/
Office Code: SC2G4TAU

Product Formats
Please select the product formats and quantity you require:

- Electronic (PDF) - Single User: USD 2000
- Hard Copy: USD 2100 + USD 56 Shipping/Handling
- Electronic (PDF) - Enterprisewide: USD 3300

* Shipping/Handling is only charged once per order.
* The price quoted above is only valid for 30 days. Please submit your order within that time frame to avail of this price as all prices are subject to change.

Contact Information
Please enter all the information below in BLOCK CAPITALS

Title: [ ] Mr [ ] Mrs [ ] Dr [ ] Miss [ ] Ms [ ] Prof
First Name: ___________________________________________ Last Name: ___________________________
Email Address: * ___________________________________________
Job Title: ___________________________________________
Organisation: ___________________________________________
Address: ___________________________________________
City: ___________________________________________
Postal / Zip Code: ___________________________________________
Country: ___________________________________________
Phone Number: ___________________________________________
Fax Number: ___________________________________________

* Please refrain from using free email accounts when ordering (e.g. Yahoo, Hotmail, AOL)
Payment Information

Please indicate the payment method you would like to use by selecting the appropriate box.

☐ Pay by credit card: You will receive an email with a link to a secure webpage to enter your credit card details.

☐ Pay by check: Please post the check, accompanied by this form, to:
Research and Markets, Guinness Center, Taylors Lane, Dublin 8, Ireland.

☐ Pay by wire transfer: Please transfer funds to:
Account number 833 130 83
Sort code 98-53-30
Swift code ULSBIE2D
IBAN number IE78ULSB98533083313083
Bank Address Ulster Bank, 27-35 Main Street, Blackrock, Co. Dublin, Ireland.

If you have a Marketing Code please enter it below:

Marketing Code: ____________________________

Please note that by ordering from Research and Markets you are agreeing to our Terms and Conditions at http://www.researchandmarkets.com/info/terms.asp

Please fax this form to:
(646) 607-1907 or (646) 964-6609 - From USA
+353-1-481-1716 or +353-1-653-1571 - From Rest of World