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GROWTH OF CONTAINERIZATION IN INDIA AND DEVELOPMENT OF MAJOR CONTAINER TERMINAL AT SAGAR ISLAND

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ABSTRACT

A sound transport system helps both domestic and international business to grow in a country. The current paper intends to review the growth of container transportation and the specific case of development of a major container terminal on the eastern seaboard of India at Sagar Island. Movement of goods using containers makes transshipment of cargo easier, protects cargo from nature and ensures safety of movement of cargo. Integration among different modes of transportation can ensure further efficiency of transportation. Containerization in the world is proceeding at a rapid pace. However, even though India has 7517 kilometers of coastline and container transportation using water transport mode is very suitable for India, container penetration in both domestic and international traffic has been less than satisfactory here. Containerization is primarily concentrated in northern and north-western India and, therefore, ports on the western coast have reaped the primary benefits of containerization. There is thus the urgent need for capacity expansion of Indian ports on the eastern seacoast. There is a proposal to build a major port at Sagar Island, in the state of West Bengal, on the eastern seaboard of India located at the confluence of the river Hooghly, since long. Currently the draught at Sagar Island is 10 meters and it is expected to increase to 12.5 meters by capital dredging. It is important to establish rail and road connections while building the major port at Sagar Island so as to get efficient and cost-competitive services from such development.

KEYWORDS

container transportation, major port, minor port, rail & road connectivity, Sagar Island.

INTRODUCTION

It is well-known that a sound transport infrastructure is the basic need for both national and international trade and commerce of a country and hence high rate of GDP growth also. It is therefore essential to invest in fixed as well as mobile components of transport infrastructure in a country. Again, integration among different modes of transportation or inter-modalism can ensure further efficiency of transportation. Ports may be considered as the fixed component of transport infrastructure which integrates water transportation and inland transportation through roadways and railways. This integration becomes easier due to the increasing use of containers in intermodal transportation. Containerization results in inter-modalism in its true sense. Investment in ports also helps to reduce cost of transportation. There was an estimated increase of world container throughput by 3.8 percent during the year 2012. In absolute terms the figure for container throughput was 601.8 million TEUs in 2012 (UNCTAD, 2013).

LITERATURE REVIEW

Dhar (2008) gave an idea of cargo management in its totality and related themes in his book. There is a description regarding marine cargo classification and history of Container transportation and effects of containerization. Then there is discussion regarding supply chain and logistics management in general. Gangwar and Raghuram (2010) discussed about problems and prospects of container transport operations in India mainly by railway mode. In January, 2006 the private operators were allowed to run container trains using railway network of the country to allow competition in container movement and attract greater share of container traffic for railways. The initial impact was good and 15 private companies got the license. CONCOR, after enjoying monopoly for 17 years, faced stiff competition from private container train operators. Then it started providing additional value added services and reduced tariff to cope up with the competition in the market. But many problems were faced by the private parties afterwards in terms of haulage increase, commodity restrictions etc.

OBJECTIVE OF THE STUDY

The objective of the present study is to review the following:

- i) The growth of the container transportation in India and
- ii) Analyze the prospects of developing the major container terminal at Sagar Island.

RESEARCH METHODOLOGY

The study has been done mainly on the basis of secondary data and information available from books and published works and reports.

PRESENTATION OF DATA AND INFORMATION ON GROWTH OF CONTAINER TRANSPORTATION

Use of containers improves efficiency by ensuring speed, safety and security of cargo movement as the units of cargo can be shipped and interchanged from ships to trucks and trains easily using the standardized containers.

The following economic factors are there behind the rapid expansion of containerization.

- Improved container logistics leading to drop in marine shipping costs
- Higher monthly shipping capacity of modern container ships by 3 to 6 times of a cargo ship.
- Faster travel time of container ships over cargo ships
- Reduction in port turnaround time of container ships due to improved container handling technologies
- Reduced inventory carrying costs resulting from reduced container shipping costs due to increased productivity.

Container capacity is measured in terms of TEU (Twenty Equivalent Unit). Today 10,000 to 12,000 TEU capacity ships are quite common. Largest container ship in early 2012 had a capacity of 15,500 TEUs. At the beginning of 2011, the company Maersk Line has ordered 20 container ships, reportedly with capacity of more than 18000 TEUs each. Use of larger container ship may result in economy of scale. It is quite understandable that larger ship sizes would require ports capable of offering full loading capacity and minimum dwell time and not many ports would be capable of offering the same.

Even though India has 7517 kilometers of coastline and there are 12 major ports, under management of the Central Government, and almost two hundred notified minor and intermediate ports, our country has not been able to stamp a serious imprint on world container trade. It is true that in India, Container traffic has increased at a rate of 13.95% during the period 2000-2001 to 2010-2011 taking all ports together. The Compound Annual Growth Rate (CAGR) of the major ports, taken separately, was 11.81% during the same period. During the same period containerized cargo increased from 2.47 million TEUs to 9.11 million TEUs (CONCOR).

TABLE-1: CARGO HANDLING AT MAJOR PORTS DURING 2011-2012 AND 2012-2013 (in '000)

PORT	UNIT	2011-2012	2012-2013		
		TOTAL	UNLOAD	LOAD	TOTAL
KOLKATA	TONNAGE	7062	3454	3506	6960
	TEUs	449	232	231	463
HALDIA	TONNAGE	2202	1657	1212	2869
	TEUs	114	68	69	137
PARADIP	TONNAGE	99	15	156	171
	TEUs	9	6	7	13
VISAKHAPATNAM	TONNAGE	4916	2274	2280	4554
	TEUs	263	124	123	247
CHENNAI	TONNAGE	28330	15105	14603	29708
	TEUs	1468	783	757	1540
V.O.CPT	TONNAGE	10129	3484	5888	9372
	TEUs	508	234	242	476
COCHIN	TONNAGE	4785	2920	1687	4607
	TEUs	351	169	166	335
NEW	TONNAGE	747	330	362	692
	TEUs	50	24	24	48
MANGALORE	TONNAGE	235	124	89	213
	TEUs	22	10	10	20
MUMBAI	TONNAGE	450	653	176	829
	TEUs	41	42	6	48
JNPT	TONNAGE	55234	30261	27650	57911
	TEUs	4,161	2,174	2,085	4,259
KANDLA	TONNAGE	452	454	1481	1935
	TEUs	29	62	56	118
TOTAL	TONNAGE	114641	60731	59090	119821
	TEUs	7,465	(3,928)	(3,776)	(7,704)

Source: Indian Ports Association

OBSERVATIONS ON THE DATA

The above table gives the figures of container handling by major ports in India in 2011-12 and 2012-13. But these figures are woefully inadequate compared to world standards. The top three large ports in the world are located in Asia. It may not be out of place to mention here that whereas in 2013 (calendar year), the top three container handling ports- Shanghai, Singapore and Shenzhen- handled 36.61, 32.60 and 23.27 million TEUs respectively (UNCTAD, 2014), India's biggest container handling port, JNPT handled only a little more than 4 million TEUs in the Financial Year 2013-14.

Many trade facilitation measures were undertaken at the world's large ports in the respective countries as providing financial incentive to the shipping and maritime industry, investing in new port infrastructure, formulating strategic planning for port development etc. to name a few to increase the trade competitiveness of the world's large ports (Research Brief, 2013).

It will be seen from the above table that the two ports handling the largest number of TEUs are Jawaharlal Nehru Port Trust (JNPT) and Chennai Port. The reason for this is not far to seek. The western and north-western hinterland together account for about 68% of the total container traffic handled in the country. The southern region has a share of 25%. The eastern region accounts for just about 7% of all such traffic. The northern hinterland itself commands 35% share of the country's total export-container streams. It is also the fastest growing region in this respect. It may be worth mentioning here that other than JNPT, the ports that are emerging as important players in the container business are also located on the north western coast of India, namely, Mundra and Pipavav.

ANALYSIS OF PROBLEMS AND PROSPECTS

It is necessary to mention here that Container Corporation of India Ltd.(CONCOR), a subsidiary of Indian Railways, is the biggest player in containers in India. It had the monopoly regarding container movement by rail till 2005. In January, 2006 this operation was opened for the private sector also to allow more competition. Immediately after that, CONCOR's market share dropped from 95% in 2007-8 to 76% in 2008-9 (Gangwar et. al., 2010). But the private container terminal operators have been facing problems of irrational structure of haulage payment to Indian Railways for using locomotives, payment for tracks and signaling system of Railways and the problem of getting land for setting up inland container depots (ICD). As a result, the benefits expected to accrue from an adequately developed competitive environment have not really fructified. It is obvious that due attention needs to be given to the various issues raised by the private operators so that Public Private Partnership in infrastructure development for movement of containers by railways proves to be a success.

Although, the Jawaharlal Nehru Port complex is presently the most important rail cargo transfer centre in India, mention must be made about the occasional incidents of congestion and delays in evacuation.

Lack of a proper, adequately equipped container terminal on the eastern seaboard of India is affecting the economic development of the vast hinterland of eastern and north-eastern states of India. The port nearest to this vast hinterland is, of course, Kolkata Port Trust (KoPT), having two dock systems at Kolkata and Haldia, but is severely stymied by inadequate draught, necessary for handling large size container ships. At present the draught at Haldia Port is 6.5 meters only. Therefore, KoPT had been proposing to build a major port, along with an adequately equipped container terminal at Sagar Island in 24 Parganas (South) since long. Sagar Island is located around 47 Km away from Haldia and 100 Km downstream of Kolkata at the confluence of the river Hooghly. This will no doubt correct the current inadequacy of lack of a proper, well equipped container terminal in the vast stretch of eastern seaboard from Chennai to Kolkata.

Considering the immediate necessity of a port that would compensate the inadequacies of Kolkata and Haldia, and in order to adequately serve the eastern and north-eastern states, Government of India have sanctioned a major port at Sagar Island in the budget of 2014-15.

One important information is that, only one portion of containers destined for India are sent directly to the Indian Ports, on the western seaboard of India, whereas international transshipment ports at Colombo, Singapore and Dubai serve as hub ports running feeder services to other Indian ports for the remaining portion of the container traffic. So there is need for capacity expansion of Indian ports. If transshipments at international hub ports are avoided, economy in terms of time and cost will be achieved in Indian international trading.

Development of a major container terminal at Sagar Island will have a few positive prospects. Currently the draught at Sagar Island is 10 meters and it is expected to increase the same to 12.5 meters by capital dredging. Secondly, the distance of the place from Singapore, a major transshipment point for world trade, is much less than that of JNPT. The distance of Kolkata from Singapore is 1555 nautical miles whereas that between JNPT and Singapore is 2493 nautical miles. Moreover, a major portion of container traffic to JNPT, which is meant for northern India, comes from the south-eastern direction ports like Singapore, Hongkong or Sydney (Misra, 2007). Container traffic has been sent from JNPT to the ICDs of CONCOR in North India at Tughlakabad, Ludhiana/Dhandharikalan, Dadri, Moradabad and Kanpur. All this traffic belongs to the natural hinterland of Kolkata Port. Distances of these ICDs from KoPT are either the same or less than that from JNPT, as would be evident from the following table.

TABLE-2: DISTANCE FROM JNPT AND KOPT TO DIFFERENT NORTH INDIAN ICDS (KMs)

ICDs	JNPT	KOPT
Tughlakabad	1443	1446
Dadri	1493	1398
Ludhiana/Dhandhari Kalan	1766	1705
Moradabad	1572	1326
Kanpur	1362	1020

Source: RITES Journal, Volume 9, 2007

Therefore it will be convenient to handle this traffic in a container terminal on the eastern seaboard of India. An Expression of Interest was invited by KoPT in 2009 to develop the facility on Public Private Partnership basis. The South-West bank of Sagar was identified for the development of the port facility.

It is also important to develop rail and road facilities while building the major port at Sagar. A very major initiative in transportation history of India was the launching of a massive road building project by National Highway Authority of India (NHAI) for interconnecting different major Indian cities and ports. After launching of the Golden Quadrilateral project, the largest express highway project in India connecting metro cities of Delhi, Mumbai, Kolkata and Chennai have already fructified and more is on the anvil, the Ministry of Railways has also announced their initiative to construct Dedicated Freight Corridor (DFC) for ensuring decongestion of railway traffic, reducing delays and fatal accidents. The Eastern Dedicated Freight Corridor (1839 Km) will be constructed from Ludhiana in Punjab to Dankuni in West Bengal and the Western Dedicated Freight Corridor (1499 Km) will connect Jawaharlal Nehru Port in Mumbai to Tughlakabad and Dadri near Delhi. Like in USA, Australia and many European countries, the Eastern and Western Dedicated Freight Corridors of India are expected to minimize transit period by connecting different ports with industries and final destinations of national and international cargo in a cost effective manner. As for example, the transit time of freight trains is expected to be almost half of what it is now for covering the distance between Delhi and Mumbai (Western DFC). Therefore the Government of West Bengal also demanded the establishment of a railway link between the proposed mega container terminal at Sagar Island and the Eastern DFC which has been planned to be constructed between Delhi and Kolkata. Accordingly, the plan is there to develop a rail-cum-road bridge across river Muri Ganga to provide connection between the island and the Ludhiana (Punjab)-Dankuni (West Bengal) Dedicated Freight Corridor of Indian Railway (Times of India, 2013). In fact, it is understood that it has already been decided to construct the following new rail links to establish connectivity between Sagar Island and Dankuni (Ministry of Railways, December, 2014):

- 1) Rail link between Kakdwip and Budakhali,
- 2) Kulpi and Diamond Harbour,
- 3) Diamond Harbour/Gurudas Nagar and Bakrahat,
- 4) Pujali and Uluberia/Birshivpur and
- 5) Doubling of Dankuni-Bhattanagar section has been sanctioned.

CONCLUSION

Therefore to achieve more globalization it is essential to ensure safe and easy movement of cargo using containers. Integration of ports with the other modes of transportation is highly needed for that purpose as containerization and inter-modalism are cost effective and safe solutions for global cargo movement. It is also urgent to improve the port facility at the eastern seaboard of India.

In fine, it must be understood that Sagar will be patronized only, and only if, it meets the expectations of shipping companies. For this to happen, it will be necessary to develop the requisite infrastructure at the port, ensure highly efficient and cost-competitive services by establishing efficient road and rail connectivity. If such facilities are available then the port at Sagar will be successful to get enough business in future.

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