



ADANI

**Mundra Port and Special Economic Zone Ltd.**

**Indian Port Sector**

## Disclaimer

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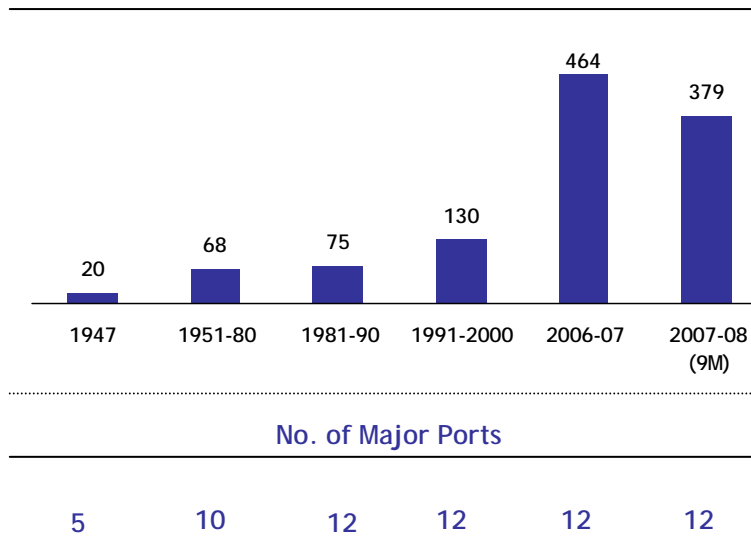
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# Indian Ports



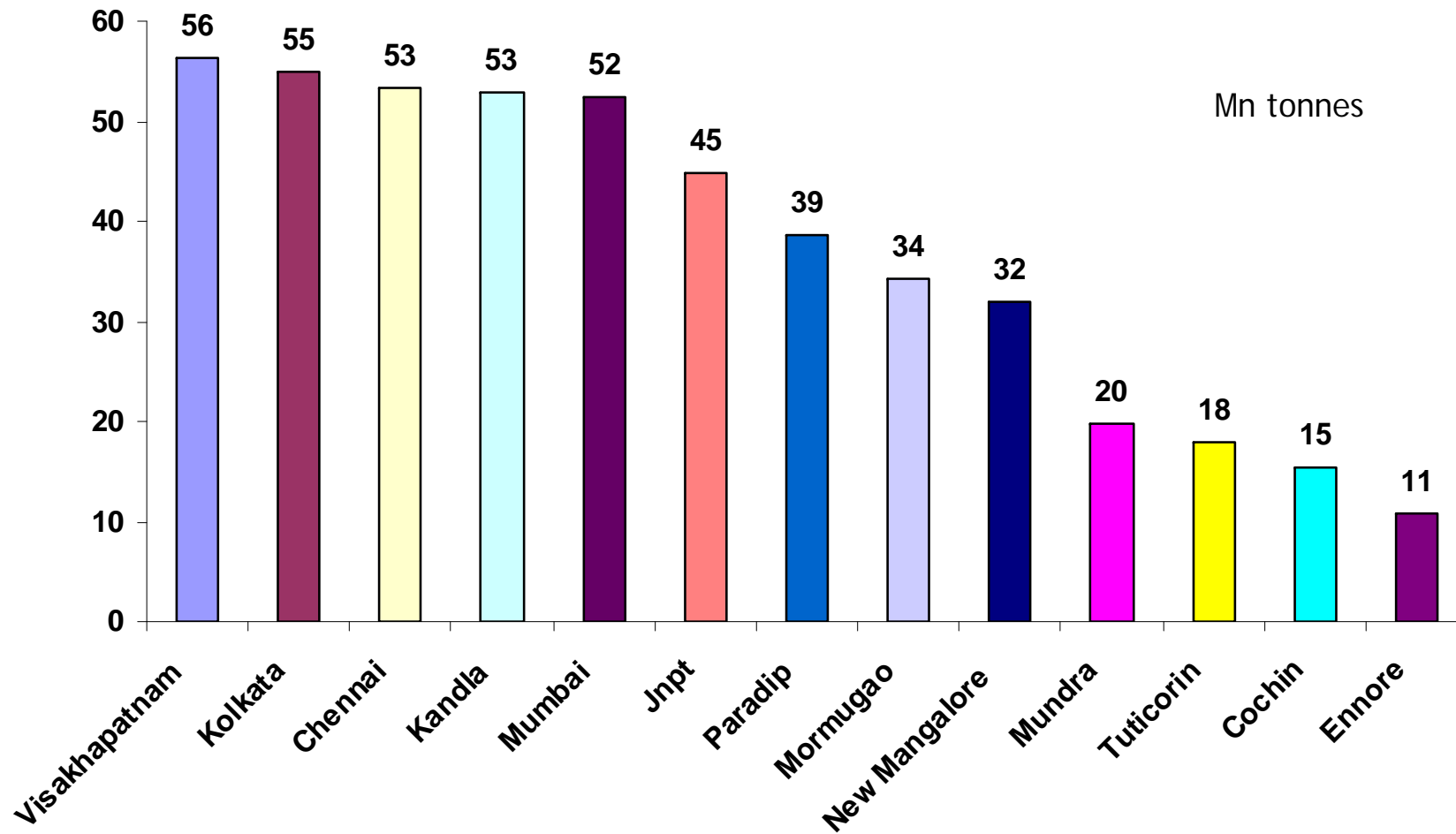
- 12 major ports & 187 non-major ports across 7,517 km long coastline
- Indian ports handle 95% of the country's total trade by volume and 70% by value
- India's share in global trade - less than 1.0%
- In 2006-07; total Capacity at Major Ports 508 MMT; and at Non Major Ports 228 MMT.
- In 2006-07: Total cargo handled 649 MMT, of which 464 MMT at Major Ports; 185 MMT at Non-major Ports
- Share of non-major ports rose from 8% in 1990-91 to 28.6% in 2006-07
- In 9 months FY 07-08; Total Cargo handled at Major Ports 378 MMT (YoY 12.5%)
- However inefficiencies at the existing ports increases the logistics cost & enlarges working capital cycle for exporters & importers, giving rise to need for more ports
- Planned capacity addition 1575MMT by FY 2012 from 736 MMT in FY 07
- Due to delays, the investment in major ports expansion is expected to fall short by about 40% against planned capacity expansions.

## Total Cargo - Major Ports (Mn Tonnes)



Source: National Maritime Development Programme, Indian Ports Association, India infrastructure report

# Ranking of Indian Ports -2007



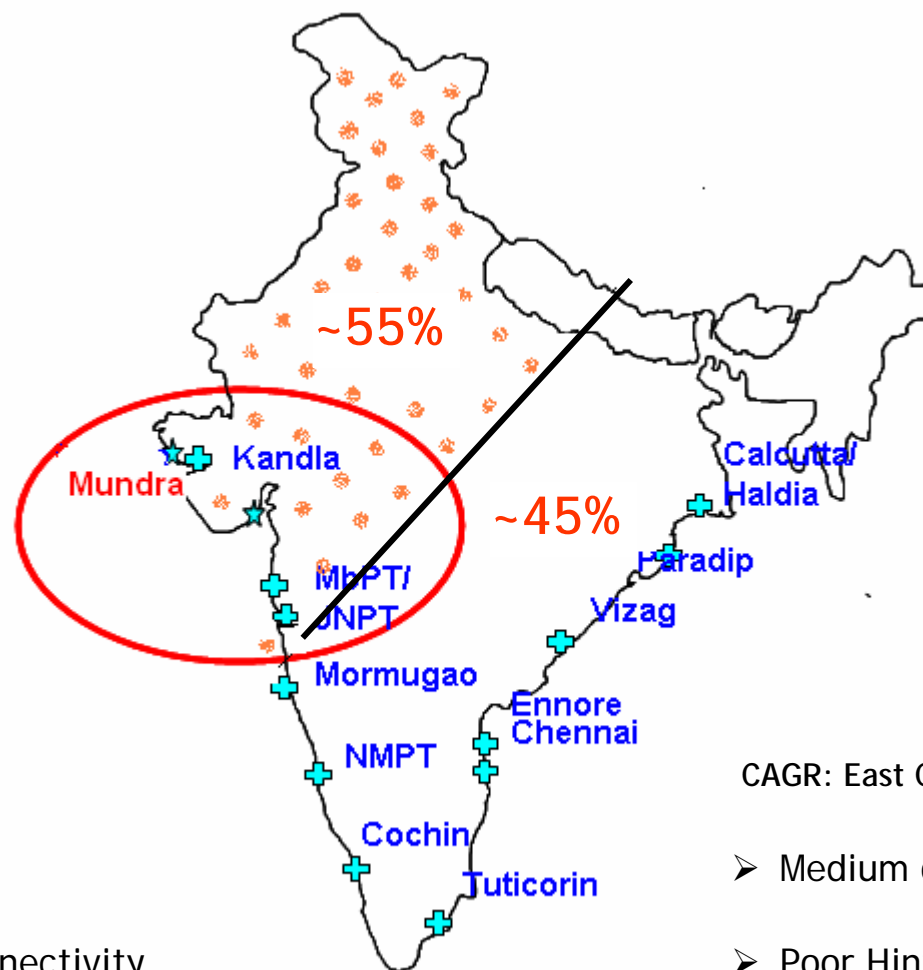
- Mundra Port Ranks 10th in comparison to other Indian Major Ports in terms of total cargo handled.

# Chinese Ports – A Comparison

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- Installed port capacity in China is 5.6 btpa vis-à-vis India's capacity of ~0.75 btpa
- Container terminal capacity in China is ~100 m teu vis-à-vis India's capacity of 8.6 m teu.
- The largest container vessel calling at Chinese Port is more than 13,000 teu where as at Indian container terminal (JNP) is 6,000 teu.
- At Chinese ports the average turnaround time is 0.8-0.9 days whereas at JNP (Container Cargo) – 1.67 Days; Visakhapatnam (BulkCargo) - 3.65 Days; While At Mundra it is (Container Cargo) – 0.9 Days and (Bulk Cargo) 3.08 days.
- The draft at Singapore is 19+ m where as at JNP it is 11.5m and at Mundra it is 17.5 m.
- The berth length at Singapore is 13,800 and that at Dubai is 4,426 m whereas total container berth length at JNP is 2000 m and at 1280 m at Mundra.

# How west and east coast stack-up



CAGR: West Coast = 11%

- Deep draft
- Good Hinterland Connectivity
- Industrialized and Growing Hinterland

CAGR: East Coast = 9%

- Medium draft (needs break-water)
- Poor Hinterland Connectivity
- Low Industrialized Hinterland



**Thank You**



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