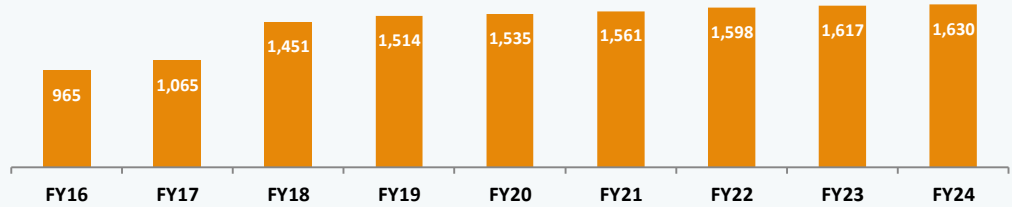


PORTS



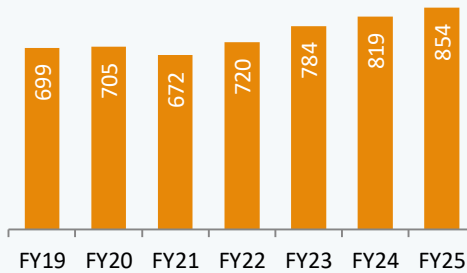
MARKET SIZE

Cargo Capacity at Major Ports (million tonnes)

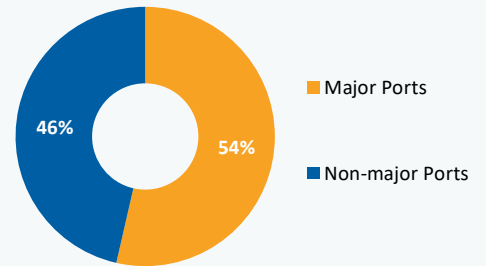


SECTOR COMPOSITION

Cargo traffic at major ports (million tonnes)

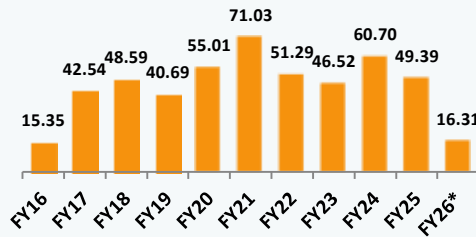


Market Share of Ports in FY25

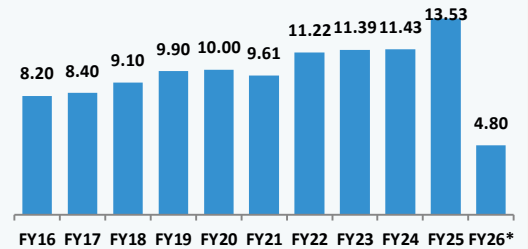


KEY TRENDS

Iron Ore traffic (million tonnes)

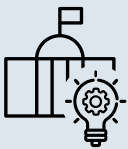


Container Traffic in India ('000 TEU)



Notes: *- Until July 2025

Notes: *- Until July 2025



GOVERNMENT INITIATIVES



Project UNNATI



Major Port Authorities Bill, 2020



100% FDI through Automatic Route



ADVANTAGE INDIA

- Robust demand:** India's Major Ports have achieved significant milestones in FY25, demonstrating notable progress in cargo handling, operational efficiency, and infrastructure development. Major Ports recorded a 4.3% growth in cargo handling, reaching approximately 855 million tonnes, up from 819 million tonnes in FY24.
- Competitive advantage:** India's ports sector is set for major expansion between FY23 and FY28, with an estimated annual capacity addition of 500-550 Million Tonnes Per Annum (MTPA). This growth is primarily driven by increased handling of Petroleum, Oil, and Lubricants (POL), coal, and containerized cargo.
- Policy support:** To encourage a modal shift to Inland Water Transport (IWT), the Government introduced the "Jalvahak" Cargo Promotion Scheme on December 15, 2024, offering 35% reimbursement on operational costs and launching scheduled cargo services on key NW routes. The Union Budget 2025-26 also extended the tonnage tax regime to inland vessels under the Indian Vessels Act 2021.
- Attractive opportunities:** The Government of India is advancing Sagarmala 2.0 with Rs. 40,000 crore (US\$ 4.65 billion) in support to drive Rs. 12,00,000 crore (US\$ 139.49 billion) in investments from 2025 to 2035. In FY25, 962 acres of land were allocated for port-led industrialisation, expected to generate Rs. 7,565 crore (US\$ 887.80 million) and attract future investments of Rs. 68,780 crore (US\$ 8.07 billion).