

പതിമൂന്നാം കേരള നിയമസഭ
അഞ്ചാം സമ്മേളനം

നക്ഷത്ര ചിഹ്നമിട്ട ചോദ്യം നമ്പർ: 178 18.06.2012- ൽ മറുപടിക്ക്

തീരദേശ ചരക്കുഗതാഗതം

ചോദ്യം

മറുപടി

ശ്രീ. എൻ. എ. നെല്ലിക്കുന്ന്
ശ്രീ. കെ.എം. ഷാജി
ശ്രീ. പി. ബി. അബ്ദുൾ റസാക്
ശ്രീ. അബ്ദു റഹീമാൻ രണ്ടത്താണി

ശ്രീ. കെ.ബാബു
(മത്സ്യബന്ധനവും തുറമുഖവും
എക്സൈസും വകുപ്പു മന്ത്രി)

(എ) സംസ്ഥാനത്തെ ചെറുകിട തുറമുഖങ്ങളെ ബന്ധിപ്പിച്ചുകൊണ്ട് തീരദേശ ചരക്കു ഗതാഗതം വർദ്ധിപ്പിക്കുന്നതിനുള്ള എന്തെങ്കിലും പദ്ധതി പരിഗണനയിലുണ്ടോ; എങ്കിൽ വിശദമാക്കുമോ;

(എ) കേരളത്തിലെ വിവിധ തുറമുഖങ്ങളേയും, ഉൾനാടൻ ജലപാതകളേയും തമ്മിൽ ബന്ധിപ്പിച്ചുകൊണ്ടും, ഏകോപിപ്പിച്ചുകൊണ്ടും ജലമാർഗ്ഗമുള്ള ചരക്ക് ഗതാഗതവും യാത്രാസൗകര്യവും മെച്ചപ്പെടുത്തുന്നതിനായി കോസ്റ്റൽ ഷിപ്പിംഗ് പദ്ധതി ആവിഷ്കരിച്ചിട്ടുണ്ട്.

(ബി) ഇതിന് പ്രാരംഭമായി ചരക്കുഗതാഗതം സംബന്ധിച്ച വിവര ശേഖരണം നടത്തിയിട്ടുണ്ടോ; എങ്കിൽ വിശദ വിവരം നൽകുമോ;

(ബി) ഉണ്ട്. കോസ്റ്റൽ ഷിപ്പിംഗിന്റെ ആക്ഷൻ പ്ലാൻ തയ്യാറാക്കാൻ നിയമിച്ച ഡിലോയിറ്റ് ടച്ച് തോഹ് മാത്സ്യ എന്ന കൺസൾട്ടന്റ് സമർപ്പിച്ചിട്ടുള്ള Strategic Road Map cum Action Plan -ൽ ഈ വിവരങ്ങൾ ലഭ്യമാണ്. പ്രസ്തുത റിപ്പോർട്ടിന്റെ പ്രസക്ത ഭാഗം അനുബന്ധമായി ചേർക്കുന്നു.

(സി) കൊല്ലം - കോട്ടപ്പുറം ജലപാത പൂർണ്ണമാകുമ്പോൾ അതു വഴി സാധ്യമാകുന്ന ചരക്ക്

(സി) ഇല്ല.

ഗതാഗതത്തിന്റെ തോത്
വിവരശേഖരണത്തിൽ
ഉൾപ്പെടുത്തിയിട്ടുണ്ടോ;

(ഡി) ഈ പദ്ധതി പ്രകാരം
ഉപയോഗപ്പെടുത്താവുന്ന
തുറമുഖങ്ങൾ
കണ്ടെത്തിയിട്ടുണ്ടോ; എങ്കിൽ
അവ ഏതൊക്കെയാണെന്ന്
വെളിപ്പെടുത്തുമോ?

(ഡി) വിഴിഞ്ഞം, കൊല്ലം,
കായംകുളം, പൊന്നാനി,
കൊടുങ്ങല്ലൂർ, ബേപ്പൂർ,
അഴീക്കൽ, കോട്ടയം എന്നീ
തുറമുഖങ്ങളാണ് ഈ പദ്ധതി
പ്രകാരം
ഉപയോഗപ്പെടുത്താവുന്ന
തുറമുഖങ്ങൾ.



സെക്ഷൻ ഓഫീസർ

2 Cargo traffic

This chapter provides details on the present scenario for cargo movements by shipping in India and Kerala. A detailed secondary research was conducted for collection of data from authentic and reliable sources. The data on cargo movements and its growth in India and Kerala were analysed to understand the trends in shipping sector. The findings are organized as per below mentioned sections:

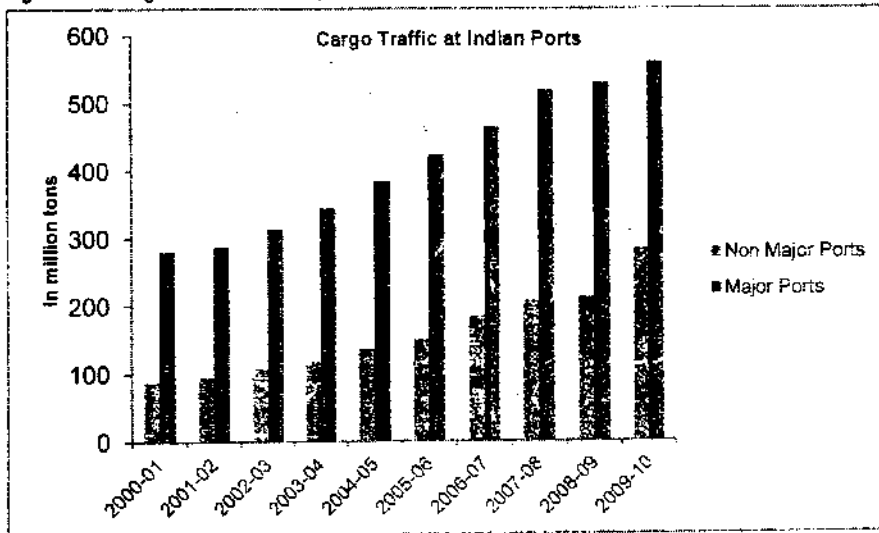
- i. Cargo traffic in India
- ii. Coastal cargo distribution
- iii. Cargo traffic in Kerala
- iv. Cargo distribution in Kerala

2.1 Cargo traffic in India

2.1.1 Cargo traffic at major and non-major ports

Cargo traffic at ports in India reached 844.90 million tons in year 2009-10. Figure 2-1 shows the traffic pattern at major and non-major ports in India for the past decade.

Figure 2-1: Cargo traffic at Indian ports



Source: Ministry of Shipping / Indian Ports Association

The total cargo traffic handled at the Indian ports over the ten years period from 2000-01 to 2009-10 has more than doubled. The cargo traffic CAGR during the period from 2000-01 to 2009-10 has been furnished in Table 2-1.

Table 2-1: Cargo traffic CAGR

| Category | CAGR (2001-10) |
|-----------------|----------------|
| Major Ports | 7.98% |
| Non Major Ports | 13.99% |
| Total | 9.66% |

Source: Deloitte analysis

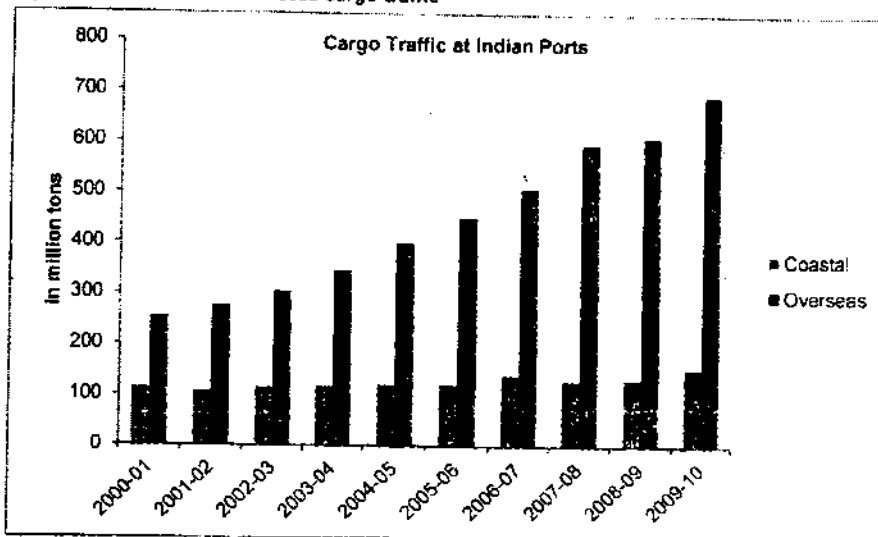
Major ports in India have enjoyed a dominant position in terms of handling cargo traffic for many years, handling more than 90% of total cargo until year 1994. However, due to capacity constraints

and congestion issues being faced at many of the major ports, the cargo traffic has witnessed significantly higher growth at non major ports. Another contributing factor to this growth is the efforts of maritime state government agencies to promote non-major ports in their states by adopting PPP model for development of non-major ports. Most of the ports with private sector participation viz. Mundra, Pipavav, Gangavaram, Krishnapatnam, Karaikkal, etc. are equipped with superior infrastructure and modern handling facilities, and hence have been growing fast. As a result, the share of non-major ports in cargo traffic has grown to more than 33% in year 2009-10 from 23% in the year 2000-01. The state of Gujarat in particular has been most dynamic and pro-active in attracting private sector participation for ports development. This is reflected with the state having more than 70% share of traffic at the non-major ports of the country.

2.1.2 Coastal and overseas cargo

The coastal and overseas cargo traffic is estimated to be 152.5 million tons and 692.4 million tons respectively in year 2009-10. Figure 2-2 shows the growth of coastal and overseas cargo at Indian ports.

Figure 2-2: Coastal and overseas cargo traffic



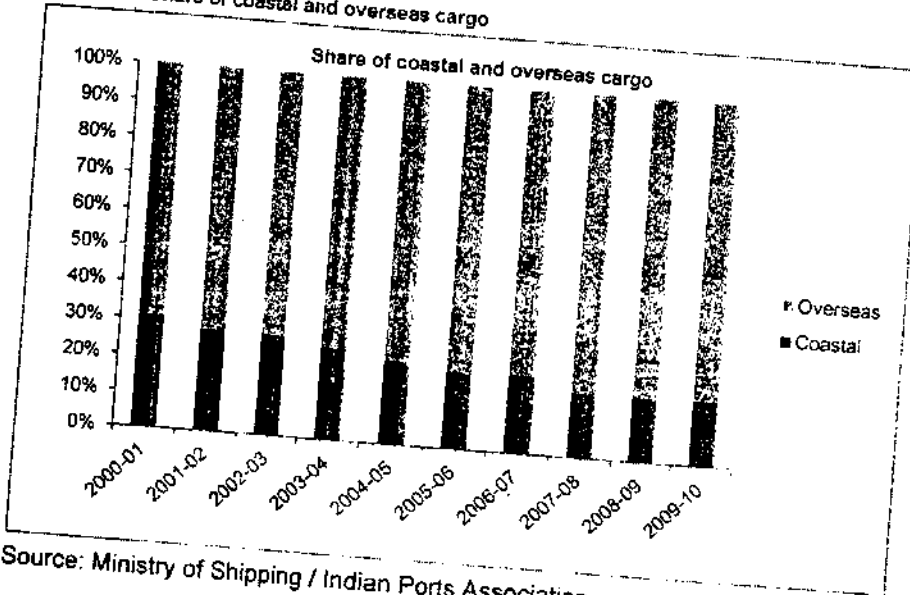
Source: Ministry of Shipping / Indian Ports Association

It should be noted that the coastal cargo figure quoted above includes cargo which is loaded as well as unloaded. Therefore, the originating (loaded) coastal cargo traffic should be half of the total, i.e. 76.25 million tons.

While the overseas cargo has registered a CAGR of nearly 12%, the coastal cargo has grown at CAGR of merely 3.3% during the period 2000-01 to 2009-10. Over the years, the share of overseas cargo has increased to 82% in 2009-10 from 69% in 2000-01 whereas the share of coastal cargo has decreased in total cargo traffic.

Figure 2-3 shows the composition of coastal and overseas cargo traffic in India.

Figure 2-3: Share of coastal and overseas cargo



Source: Ministry of Shipping / Indian Ports Association

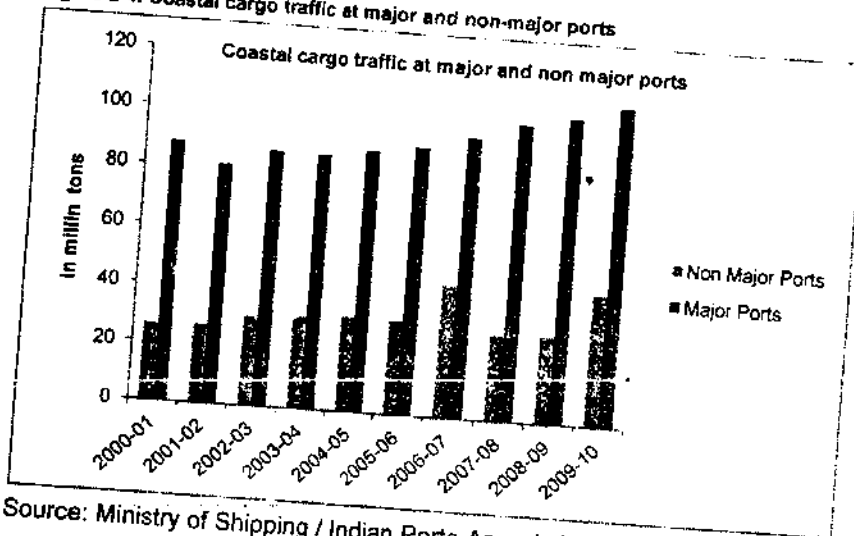
2.2 Coastal cargo distribution

2.2.1 Port-type wise

Figure 2-4 shows the coastal cargo growth at major and non-major ports in India. The cargo at major ports shows a CAGR of 2.33% whereas at non-major ports it has a CAGR of 6.15%. This trend of higher growth of coastal cargo at non-major ports is likely to continue for the following reasons:

- i. Major ports are already facing capacity constraints and hence catering to coastal cargo becomes bit more difficult
- ii. Non-major ports offer more incentives and competitive tariffs to attract cargo traffic, especially coastal cargo

Figure 2-4: Coastal cargo traffic at major and non-major ports

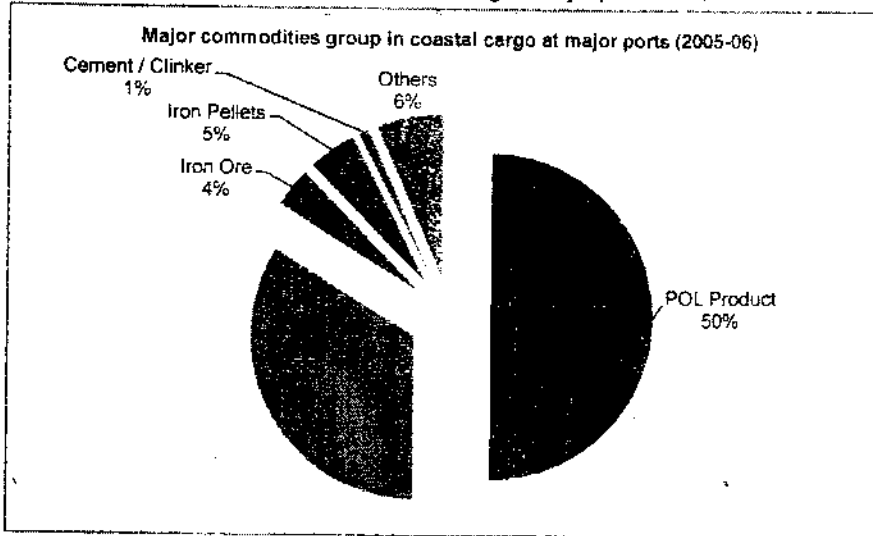


Source: Ministry of Shipping / Indian Ports Association

2.2.2 Commodity wise distribution

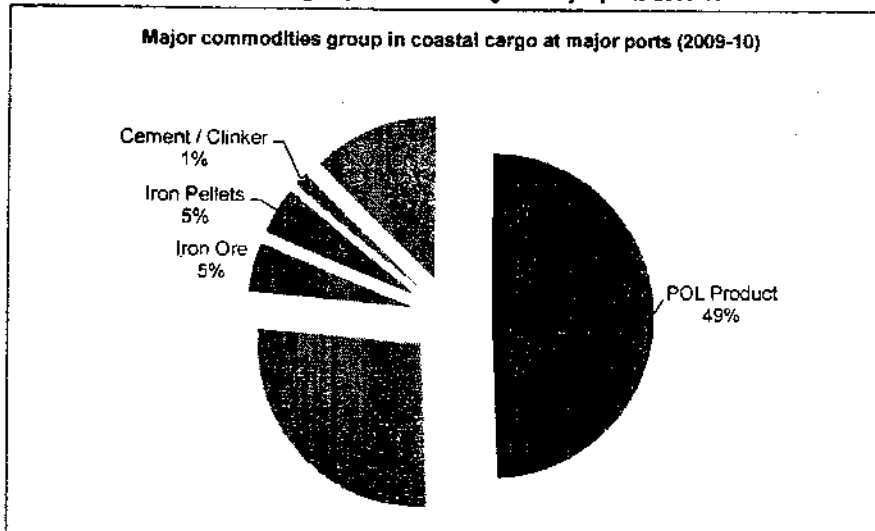
Commodity wise distribution of coastal cargo at major ports in India in year 2005-06 and 2009-10 is represented separately in Figure 2-5 and Figure 2-6. The POL group (liquid bulk) has the highest share followed by thermal coal (dry bulk) in coastal cargo. Other major commodities include cement / clinker, iron ore, iron pellets in dry bulk and containerised general cargo.

Figure 2-5: Major commodities group in coastal cargo at major ports 2005-06



Source: Indian Ports Association

Figure 2-6: Major commodities group in coastal cargo at major ports 2009-10



Source: Indian Ports Association

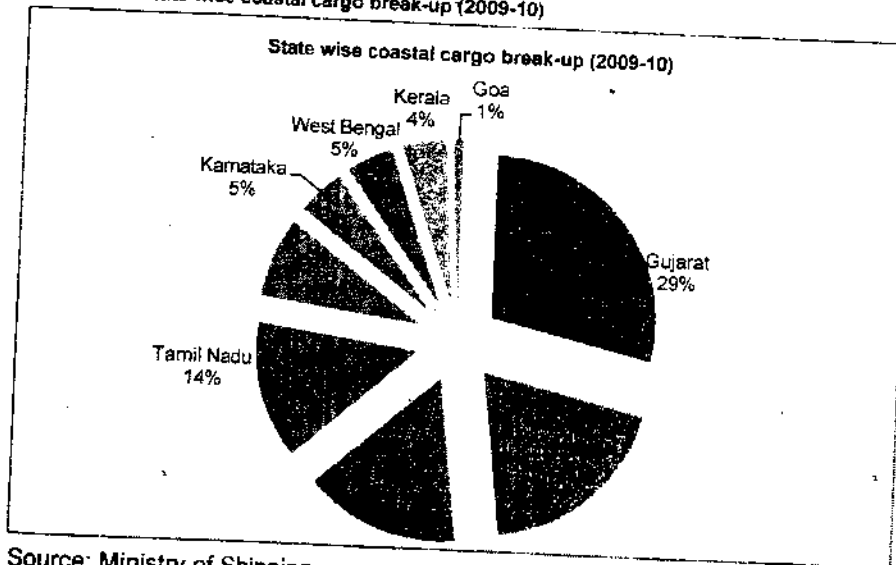
It can be seen from the above two charts, that the coastal cargo pattern being handled at the Indian ports is undergoing a change. The share of bulk cargo (liquid, dry and break) commodities such as POL, Coal, Iron and Cement has come down from 94% in 2005-06 to 87% in 2009-10. On the other hand the share of 'Others'%, which includes container traffic, has seen dramatic increase from 6% to 13. This is on account of increasing containerization of goods, due to buyers / manufacturers

preferring smaller but optimum quantities to reduce the inventory carrying cost of their raw materials, a trend which is expected to continue in future.

2.2.3 State wise distribution

State wise distribution of coastal cargo is represented in Figure 2-7.

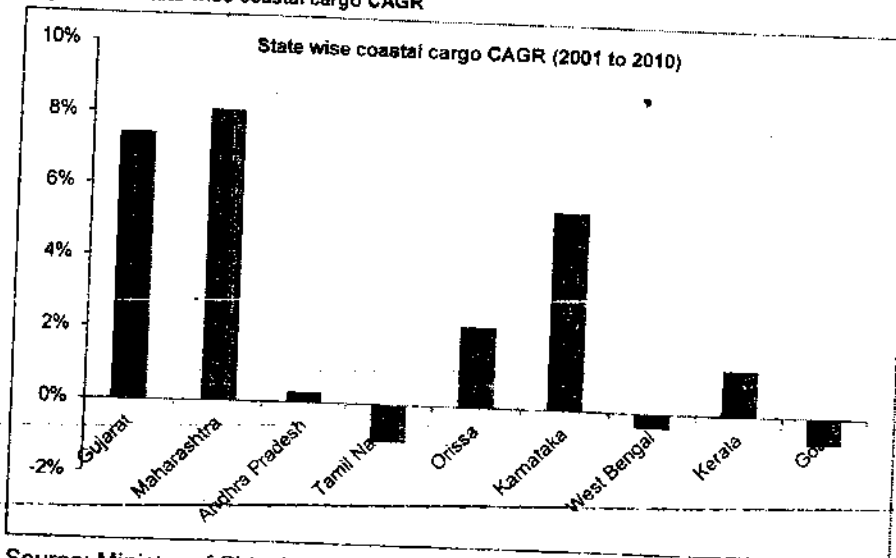
Figure 2-7: State wise coastal cargo break-up (2009-10)



Source: Ministry of Shipping

The states of Gujarat and Maharashtra on the west coast together account for almost half of the coastal cargo traffic in the country. Further, the four states namely, Gujarat, Maharashtra, Andhra Pradesh and Tamil Nadu, clubbed together have more than 75% share of coastal cargo. Significant chunk of the coastal cargo handled in the states of Tamil Nadu, Andhra Pradesh and West Bengal comprise of bulk cargo. The state of Kerala ranks second last with a 4% share in coastal cargo traffic. The CAGR for coastal cargo has been depicted in Figure 2-8.

Figure 2-8: State wise coastal cargo CAGR



Source: Ministry of Shipping

The states of Gujarat and Maharashtra leads in growth of coastal cargo traffic at ports. However, there has been a decline in cargo traffic in the states of Tamil Nadu, West Bengal and Goa.

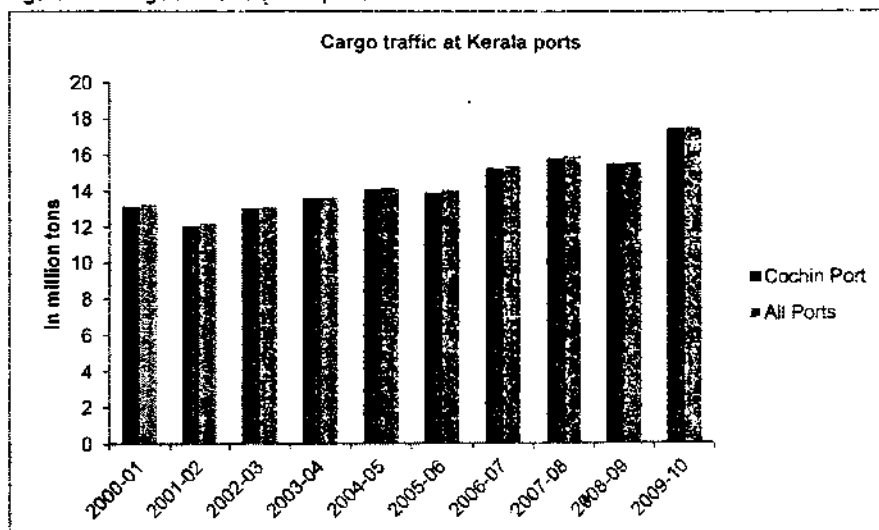
The states of Gujarat and Maharashtra have been forerunners in creation of infrastructure and creating conducive environment for business and attracting investments. It can be deduced that the maritime states with developed infrastructure and environment conducive to business, are likely to have larger share in cargo traffic with high pace of growth. These states are also bestowed with a thriving industrial hinterland and with the implementation of the Delhi-Mumbai Industrial corridor by the next decade; the maritime environment in the two states will remain bullish.

2.3 Cargo traffic in Kerala

2.3.1 Cargo volume in Kerala

In addition to the state controlled ports, Cochin port, which is a major port, is also located in Kerala. Cargo traffic at Cochin and all the ports in Kerala is shown in Figure 2-9. It can be noted that the Cochin port continues to account for more than 99% of cargo traffic at ports in Kerala and non-major ports handle negligible cargo traffic in the state. The overall cargo traffic in the state has registered a CAGR of 3.18% during the period 2000-01 to 2009-10.

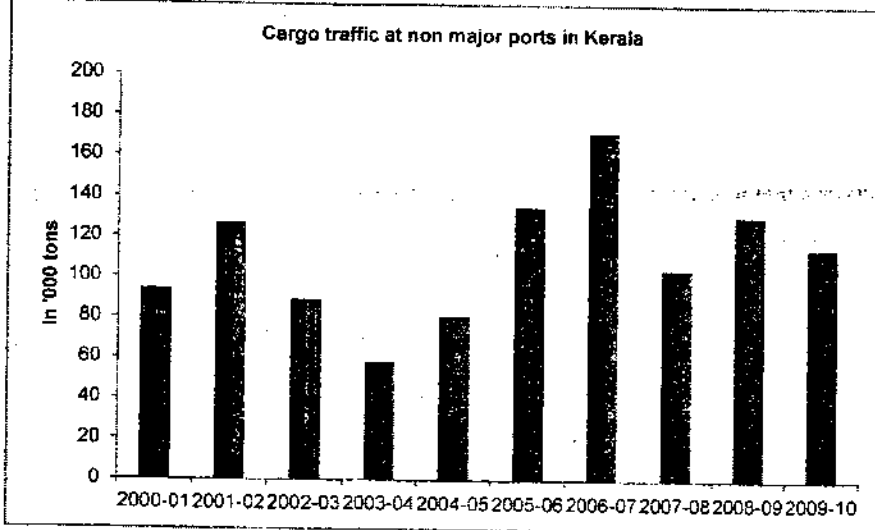
Figure 2-9: Cargo traffic at Kerala ports



Source: Ministry of Shipping / Indian Ports Association

Traffic at the non-major ports in Kerala stood at 115,000 tons in year 2009-10. The growth of traffic over the years is shown in Figure 2-10. The state has witnessed ups and down in the cargo traffic over the years. The cargo traffic at non-major ports in Kerala has registered a CAGR of merely 2.27% during the period 2000-01 to 2009-10. As compared to the country, Kerala has lagged behind in development of state controlled ports, which have registered a CAGR of 13.99% during the same period.

Figure 2-10: Cargo traffic at non-major ports in Kerala



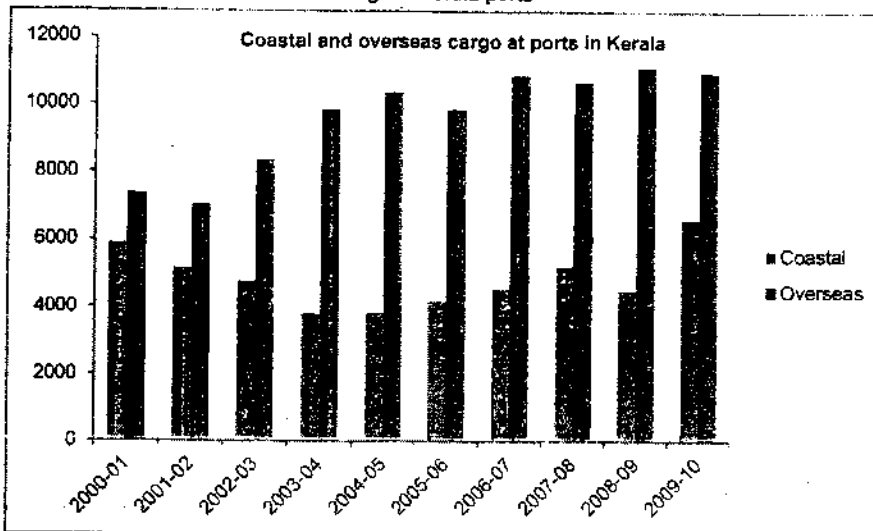
Source: Ministry of Shipping / Indian Ports Association

2.4 Cargo distribution in Kerala

2.4.1 Coastal and overseas cargo traffic in Kerala

Figure 2-11 shows the growth of coastal and overseas cargo traffic at the ports in Kerala. The share of coastal cargo at ports in Kerala has come down to around 37% in 2009-10 from almost 45% in 2000-01.

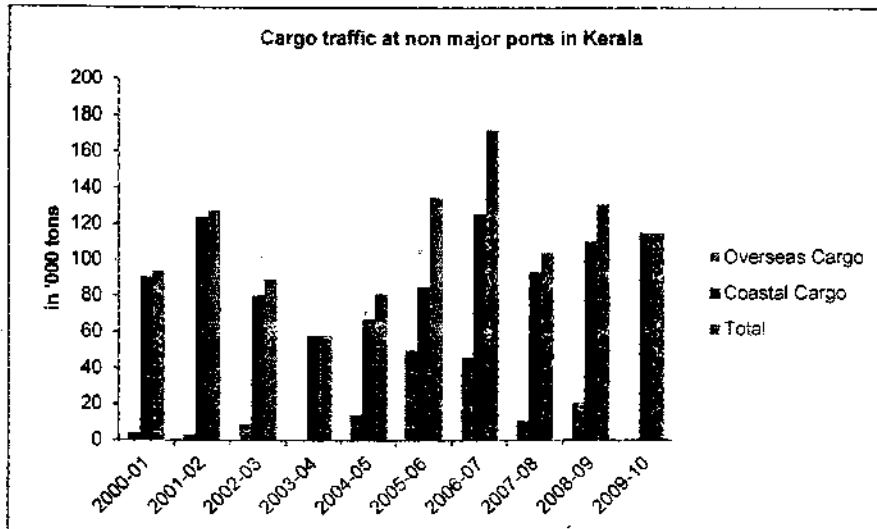
Figure 2-11: Coastal and overseas cargo at Kerala ports



Source: Ministry of Shipping / Indian Ports Association

Coastal cargo accounts for around 37% of cargo traffic at Cochin port and more than 80% at non major ports in Kerala, which mainly handle the coastal cargo traffic. Coastal cargo traffic in Kerala has registered a CAGR of 1.25% during the period 2000-01 to 2009-10, whereas the same for overseas cargo is 4.5%. Figure 2-12 shows the cargo traffic at non major ports in Kerala.

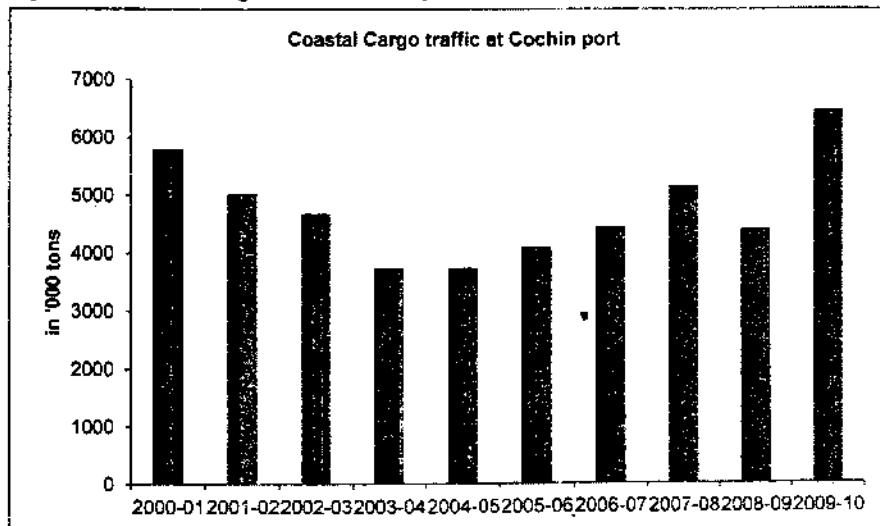
Figure 2-12: Cargo traffic at non major ports in Kerala



Source: Ministry of Shipping / Indian Ports Association

Non-major ports in Kerala continue to handle mainly the coastal cargo. The coastal cargo at non major ports in Kerala has registered a CAGR of 2.76% during the period 2000-01 to 2009-10. Similarly the coastal cargo growth handled at Cochin Port is also not very encouraging. Figure 2-13 shows the coastal cargo traffic at Cochin port which has grown at CAGR of 1.22% during the period 2000-01 to 2009-10.

Figure 2-13: Coastal Cargo traffic at Cochin port



Source: Ministry of Shipping / Indian Ports Association

2.4.2 Commodity distribution

The type wise distribution of coastal cargo at Cochin port and non-major ports in Kerala is shown in Figure 2-14 and Figure 2-15. While POL and other liquid bulk constitutes major chunk of cargo at Cochin port, building materials account for larger chunk at non-major ports.

Figure 2-14: Coastal cargo at Cochin port

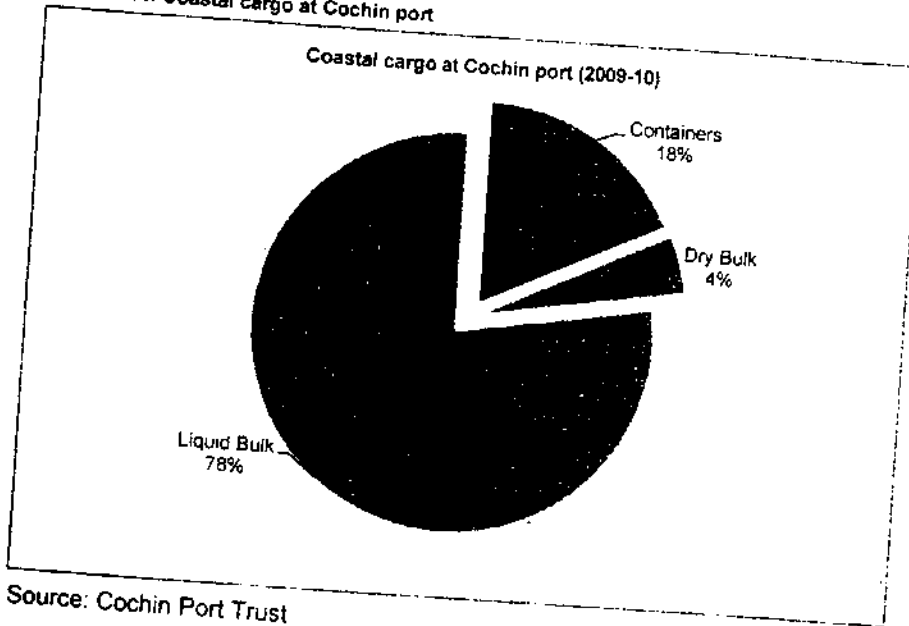
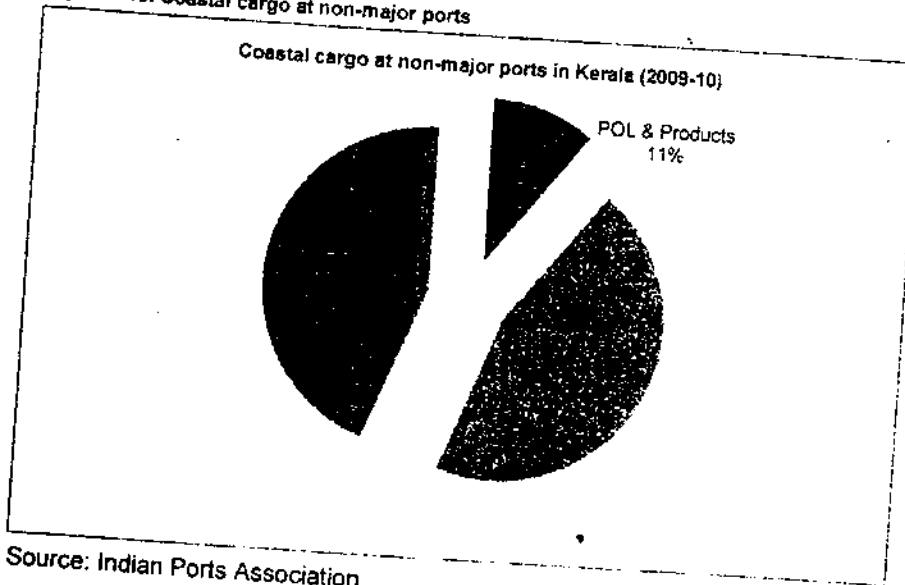


Figure 2-15: Coastal cargo at non-major ports



Others mainly include tiles, marbles, granites, soda ash, wheat, rubber & its products, plywood amongst others. Commodities included in coastal cargo are covered in the following chapter titled 'Commodity Profile'.

Cross
Section Officer