



## Indian Port Sector



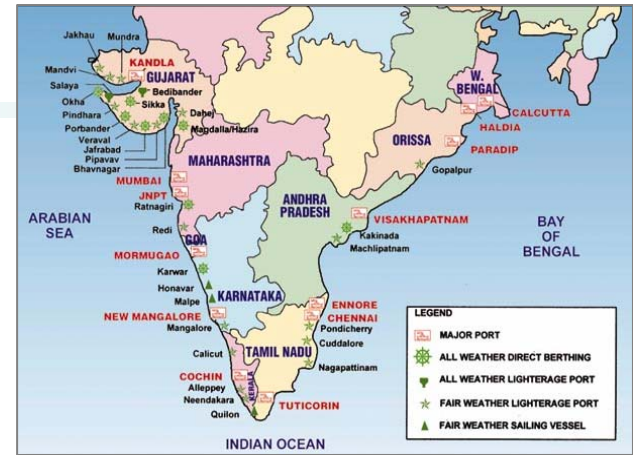
# Safe Harbour

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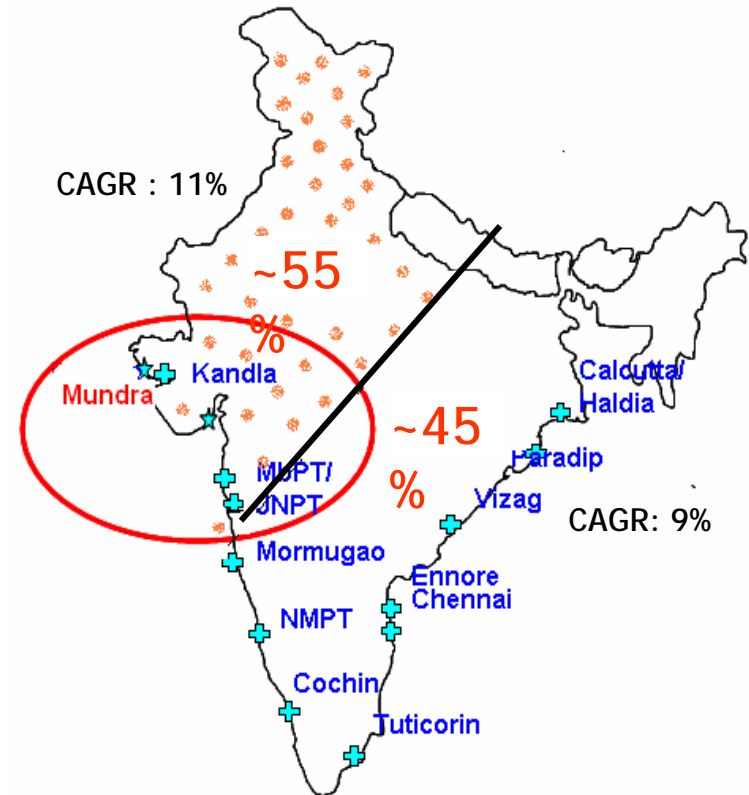
Except for the historical information contained herein, statements in this presentation and the subsequent discussions, which include words or phrases such as “will”, “aim”, “will likely result”, “would”, “believe”, “may”, “expect”, “will continue”, “anticipate”, “estimate”, “intend”, “plan”, “contemplate”, “seek to”, “future”, “objective”, “goal”, “likely”, “project”, “should”, “potential”, “will pursue” and similar expressions or variations of such expressions may constitute "forward-looking statements". These forward-looking statements involve a number of risks, uncertainties and other factors that could cause actual results to differ materially from those suggested by the forward-looking statements. These risks and uncertainties include, but are not limited to our ability to successfully implement our strategy, our growth and expansion plans, obtain regulatory approvals, our provisioning policies, technological changes, investment and business income, cash flow projections, our exposure to market risks as well as other risks. The Company does not undertake any obligation to update forward-looking statements to reflect events or circumstances after the date thereof.

# Indian Ports

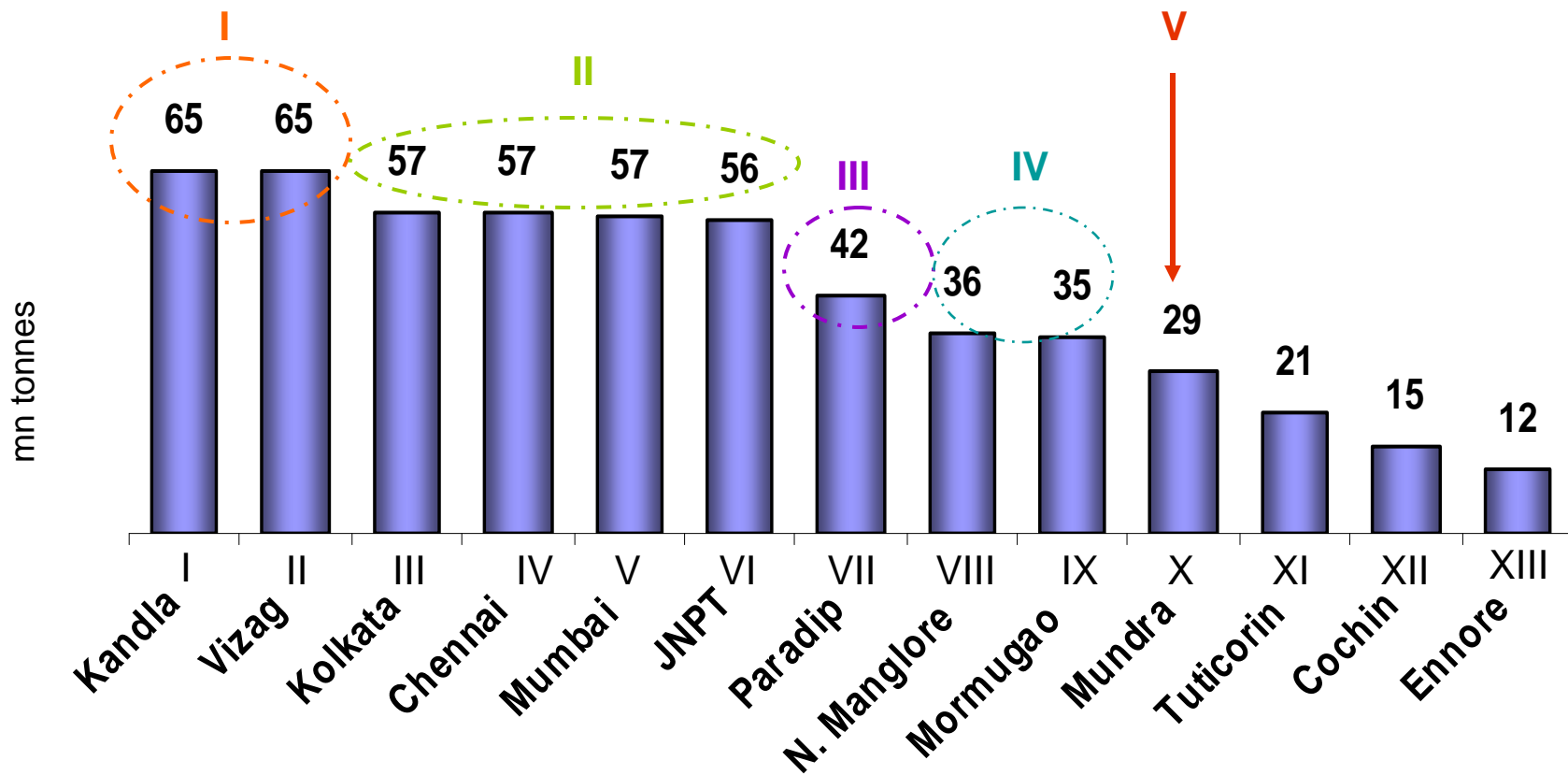
- Indian Ports growing at a CAGR of 11% for last 5 Years
- 07-08 Total Cargo Handled ~ 704 mmt (Major: 519 mmt & Non Major: 185 mmt) YoY – 11.9%



- Only 2 privately owned fully operational land lord ports:  
Mundra & Pipavav – Cargo Handled 32.9 mmt (18%)
- Current Capacity 765 mmt – Operating at 92%
- Existing Capacity Shortfall of 150 mmt
- Planned Capacity addition 1575 mmt by FY 2012



# Cargo at Indian Ports – 2008



# Indian Port Performance 2007- 08

(In MT)

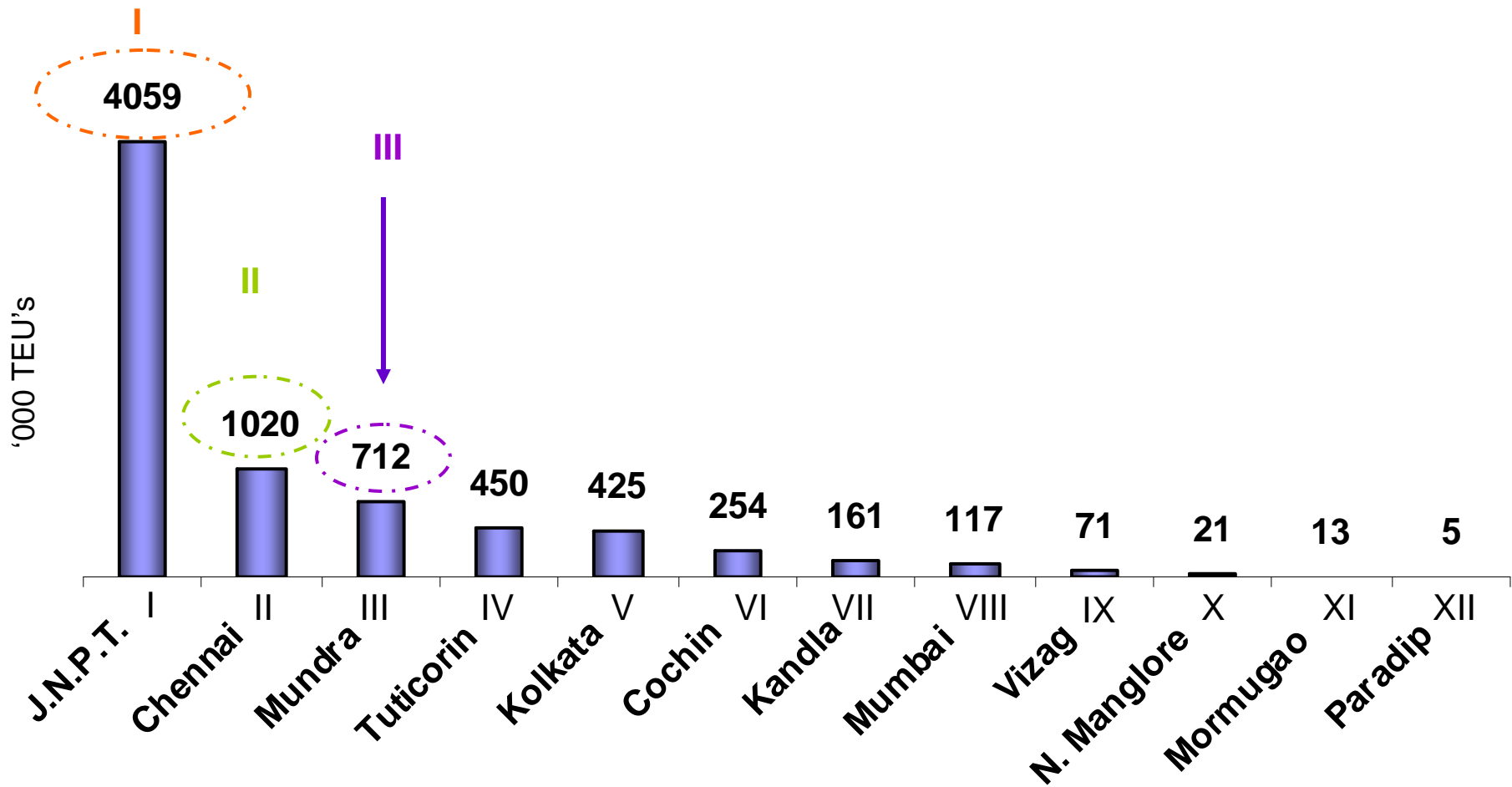
Ports	2005-06	2006-07	2007-08	YoY (07-08/ 06-07)	Remarks ( Major Cargo for Yr. 2007 - 08)
Kandla	55.80	52.98	64.9	22.5%	Crude : 38.17 ( IOC, Essar: 28.54 )
Vizag	53.14	56.39	64.6	14.6%	Crude : 19.80 mt , Iron Ore: 18.36
Kolkata	47.25	55.05	57.3	4.1%	Crude : 22.36 , Iron Ore: 10.30
Chennai	45.91	53.41	57.2	7.0%	Container : 18.05 mt, Crude : 12.79, Iron ore: 10.82
Mumbai	44.19	52.36	57.0	8.9%	Crude : 37.07
JNPT	37.84	44.82	55.8	24.4%	Container : 4.06 Mn TEUs
Paradip	33.11	38.52	42.4	10.2%	Thermal Coal: 13.34, Iron Ore: 12.95
N. Manglore	31.69	32.04	36.0	12.4%	Crude : 21.78 , Iron Ore: 9.26
Mormugao	34.45	34.24	35.2	2.9%	Iron Ore: 27.32
Tuticorin	13.89	18.00	21.5	19.3%	Thermal Coal: 6.12 , Container : 5.63
Cochin	9.17	15.31	15.8	3.2%	Crude : 11.29 Container : 3.23
Ennore		10.71	11.6	7.9%	Thermal Coal: 9.05 , Iron Ore: 2.19
<b>ALL MAJOR PORTS</b>	<b>423.57</b>	<b>463.84</b>	<b>519.23</b>	<b>11.9%</b>	
Mundra	17.14	19.80	28.8	45.6%	Container : 8.48 Crude : 6.97
Other Non Major Ports	135.86	165.74	172.3	4.0%	
<b>TOTAL</b>	<b>576.57</b>	<b>649.38</b>	<b>720.38</b>	<b>10.9%</b>	

# Indian Port Performance 2007- 08

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- Indian Port Cargo grew to 720 mt. (FY 08) against 649 mt. (FY 07) (YoY: 10.9%)
- Major Ports handled 519 mt. (FY 08) of Cargo, against 463 mt. (FY 07) (YoY 11.9%)
- Minor Ports Cargo was recorded at 201 mt. (FY 08) against 185 mt. (FY 07). (YoY: 8.5%)
- Minor Ports' contribute to around 28% of Indian Port Cargo.
- Upper West Coast Ports (Mumbai, JNPT, Kandla, Mundra) have grown by 21.5% in FY 08 over FY 07.
- Mundra Port's Cargo grew to 29 mt. (FY 08) against 20 mt. (FY 07) (YoY: 45.6%)

# Container Cargo at Indian Ports – 2008



# Indian Container Performance 2007- 08

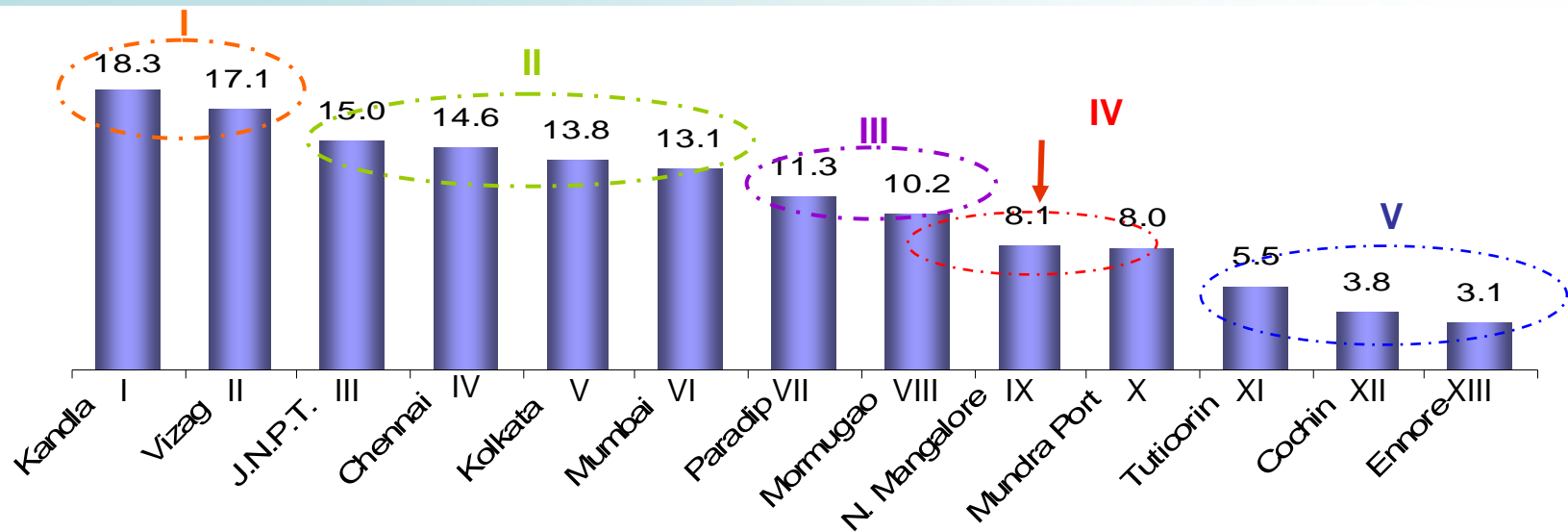
(in '000 TEU's)

PORT	2005-06	2006-07	2007-08	YoY (2007 - 08/ 2006 07)
J.N.P.T.	2667	3298	4059	23.1%
J.N.P.T.	1341	1305	1290	-1.1%
NSICT	1322	1359	1500	10.4%
GTIL	4	634	1269	100.2%
Chennai	735	798	1020	27.8%
Tuticorin	321	377	450	19.4%
Kolkata	313	350	425	21.4%
Cochin	203	227	254	11.9%
Kandla	148	177	161	-9.0%
Mumbai	156	128	117	-8.6%
Visakhapatnam	47	50	71	42.0%
New Mangalore	10	17	21	23.5%
Mormugao	9	12	13	8.3%
Paradip	4	2	5	150.0%
<b>MAJOR PORTS</b>	<b>4613</b>	<b>5437</b>	<b>6596</b>	<b>21.4%</b>
Mundra	299	520	712	36.8%
Pipavav	88	164	200	22.0%
<b>TOTAL</b>	<b>5000</b>	<b>6121</b>	<b>7512</b>	<b>22.7%</b>

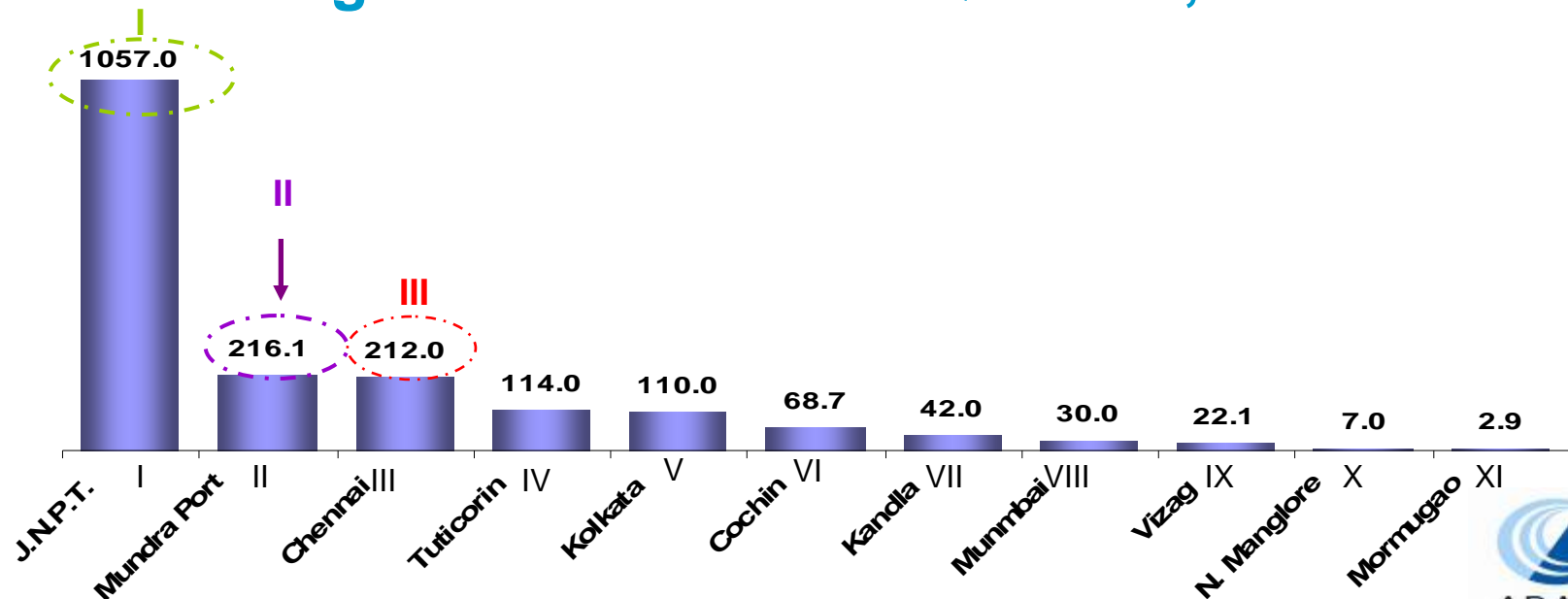
# Indian Container Performance 2007- 08

- Indian Container Cargo grew to 7.5 Mn. TEUs (FY 08) against 6.1 Mn. TEUs. (FY 07) (YoY: 22.7%)
- Major Port Container Cargo 6.6 Mn. TEUs. (FY 08) against 5.4 Mn. TEUs.(FY 07) (YoY 21.4%)
- Upper West Coast Ports (Mumbai, JNPT, Kandla, Mundra, Pipavav) handled 5.2 Mn. TEUs (FY 08);  
70.0% of the total container Cargo in India.
- Important West Coast Ports (JNPT, Mundra, Pipavav) handled 5.0 Mn. TEUs in FY 08 against 4.0 Mn.  
TEUs (YoY: 25.0%)
- Mundra Port handled 0.7 Mn. TEUs (FY 08) against 0.5 Mn. TEUs (FY 07) (YoY 36.8%)

# Cargo at Indian Ports – Quarter I, 2008-09



# Container Cargo at Indian Ports – Quarter I, 2008-09



# Indian Port Performance: April to June 2008-09

No.	MAJOR PORTS	Total Cargo (in Mn. T)			Container Cargo (in '000 TEUs)		
		Q1 07-08	Q1 08-09	% change	Q1 07-08	Q1 08-09	% change
1	KOLKATA	13.4	13.8	2.9%	96.0	110.0	14.6%
2	PARADIP	9.6	11.3	17.3%	1.0	0.0	
3	VISAKHAPATNAM	15.2	17.1	12.2%	14.0	22.1	57.6%
4	ENNORE	2.8	3.1	8.1%	0.0	0.0	
5	CHENNAI	13.7	14.6	6.7%	262.0	212.0	-19.1%
6	TUTICORIN	4.6	5.5	18.4%	109.0	114.0	4.6%
7	COCHIN	3.9	3.8	-1.3%	58.0	68.7	18.5%
8	NEW MANGALORE	8.9	8.1	-8.9%	4.0	7.0	75.0%
9	MORMUGAO	8.8	10.2	16.2%	3.0	2.9	-3.7%
10	MUMBAI	13.9	13.1	-5.6%	28.0	30.0	7.1%
11	J.N.P.T.	12.6	15.0	18.8%	942.0	1057.0	12.2%
12	KANDLA	15.5	18.3	17.7%	48.0	42.0	-12.5%
	<b>ALL MAJOR PORTS</b>	<b>123.0</b>	<b>133.8</b>	<b>8.8%</b>	<b>1565.0</b>	<b>1665.7</b>	<b>6.4%</b>
	Mundra Port	5.7	8.0	39.9%	151.0	216.1	43.1%

Source: Indian Ports Association

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**Thank You**

