CONTAINERS INDIA 2026





SOUTH ASIA CONTAINER MARKET REPORT 2026

By

maritime gateway

Drewry

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- KPMG India Winner – Global Tech Innovator 2023
- Top 10 Blockchain Startups – CIO Magazine
- Nasscom Emerge 50 Award
- Forbes DGEMS Select 200 - Fastest-growing 200 companies with global potential.

FOREWORD

The year 2026 finds the container shipping and logistics industry navigating a world that is no longer defined by a single dominant narrative, but by overlapping forces of geopolitics, restructuring supply chains, decarbonisation imperatives, and accelerating digitalisation. The aftershocks of what unfolded through the early 2020s continue to shape today's market realities. The capacity surge by shipping lines in the post-pandemic period, the subsequent softening of freight rates, persistent geopolitical tensions, and the gradual re-ordering of global manufacturing footprints have together redefined how cargo moves, where it moves, and through which gateways.

South Asia has emerged as one of the most consequential theatres in this evolving landscape. As companies diversify sourcing beyond traditional centres, the region is increasingly being viewed not merely as a consumption market, but as a critical production and transhipment ecosystem. Trade flows within Asia are deepening, even as linkages with Europe, Africa, and the Americas are being recalibrated. Free Trade Agreements, regional economic partnerships, and bilateral corridors are quietly but decisively influencing routing decisions and cargo choices. At the same time, governments across South Asia are pushing structural reforms to make supply chains faster, cheaper, and more predictable. Customs modernisation, business process reengineering, single-window platforms, and paperless trade are moving from policy intent to operational reality. Investments in port capacity, deeper drafts, automation, rail connectivity, inland waterways, logistics parks, and air cargo infrastructure are collectively altering the competitive equation for gateway and transhipment hubs.

India, and particularly South India, sits at the heart of this transformation. With its expanding manufacturing base, strong domestic consumption, improving hinterland connectivity, and an ambitious port modernisation agenda, the region is steadily strengthening its position in global container networks. The coming decade will be defined not only by how much capacity is added, but by how intelligently that capacity is deployed and integrated into multimodal logistics ecosystems.

Against this backdrop, the 2026 edition of the South India Container Market Report has been expanded in both depth and scope. In addition to a comprehensive analysis of container volumes, port performance, trade lanes, and carrier deployment patterns, this edition introduces detailed terminal profiles covering major container terminals across South Asia. These profiles aim to provide stakeholders with practical, comparable insights into infrastructure capabilities, operational features, connectivity, and future expansion plans.

Our objective remains consistent: to offer industry decision-makers a clear, data-driven, and contextual understanding of market dynamics, while also capturing the strategic undercurrents shaping the future. We believe this report will serve as a valuable reference for policymakers, port authorities, terminal operators, shipping lines, logistics service providers, investors, and cargo owners as they navigate the next phase of growth in South Asia's container economy.

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Price: INR 7500/- USD 85 (Exclusive of Postage/courier)

South Asia Container Trade

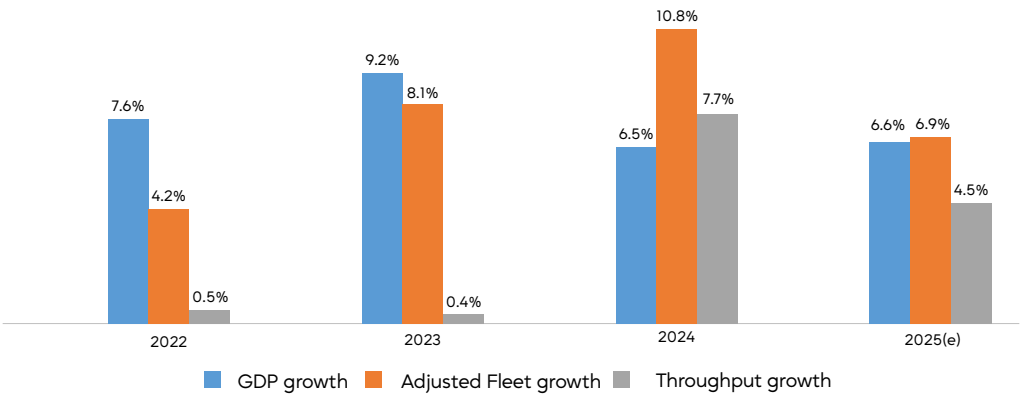
Global Supply-Demand Situation

Tariffs continue to dominate market conversations, with discussions focused heavily on the resulting "uncertainty" and "volatility" in global trade. The operational and strategic pressures created by punitive tariff measures and escalating geopolitical tensions are significant, disrupting traditional patterns of container demand and making accurate forecasting increasingly challenging.

A strong rebound in container demand marked 2024, despite considerable market disruptions. Global port throughput exceeded expectations in every quarter, with full-year container handling rising 7.7%, according to Drewry—surpassing even the pandemic-driven surge of 7% recorded in 2021. However, recent months have highlighted continued volatility in demand projections. Earlier, Drewry lowered its 2025 global throughput forecast to +1.9% in the June update. Yet, better-than-anticipated results in the first half of the year and an improved outlook for the remainder of 2025 have prompted a significant upward revision, with the latest forecast (in the September update) now standing at +4.5%. Expectations for 2026 have also been adjusted upward, from 0.5% to 1.3%. The global cellular containership fleet supply increased by 10.8% in 2024.

The orderbook had expanded to 9.9 mteu, equivalent to 30.6% of the active fleet, with subsequent orders pushing it beyond the 10 mteu mark. Drewry now expects the fleet to grow by 6.9% in 2025—an upward revision of 1.2 percentage points from the June forecast—driven by higher-than-anticipated newbuild deliveries and lower-than-expected vessel demolitions.

Global economy and container shipping supply-demand growth



Source: World Economic Outlook, IMF and Drewry Maritime Research.

Liner connectivity

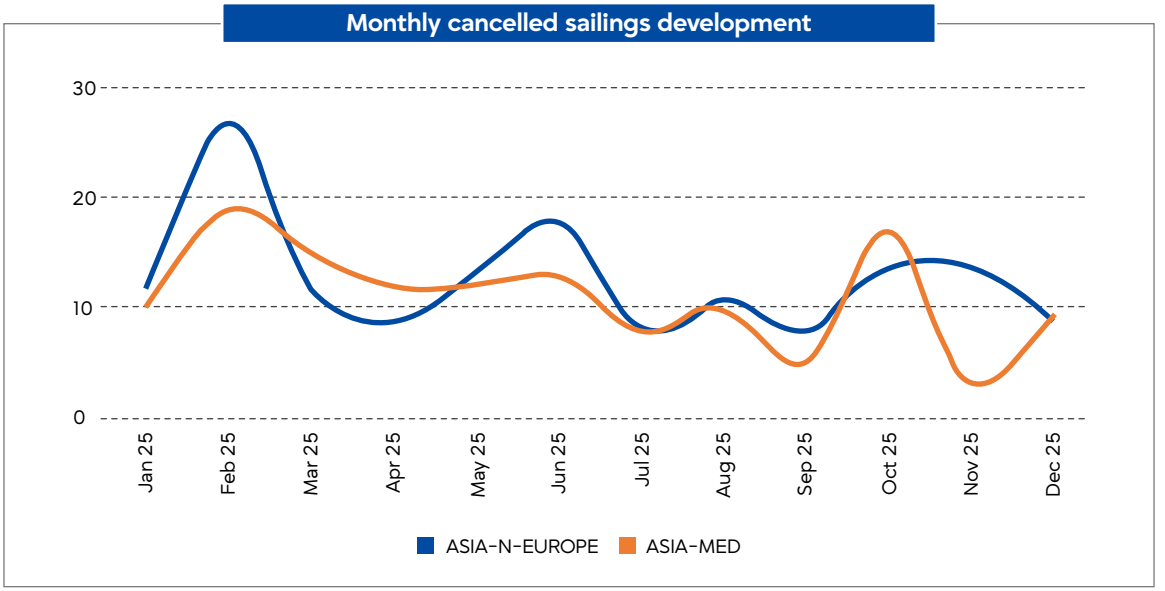
There's finally some encouraging news for the container shipping sector. The United States and China have eased tensions by scaling back their trade war, reducing custom tariffs, lifting export restrictions, and suspending port fees on vessels tied to each other's markets. As part of this agreement, both countries will pause their reciprocal port fees, effective 10 November, for 12 months—an action expected to save carriers, especially Chinese operators, billions of dollars.

Another positive development is the increasing likelihood of full-scale Suez Canal transits resuming, a phenomenon not seen since the Houthis' attacks began in the Red Sea/Bab al-Mandab region in late 2023. With the Gaza ceasefire holding, the Houthis have signalled they will halt attacks, but with a warning: if hostilities against Gaza resume, they will restart military operations.

These developments, on both the trade war and Red Sea fronts, will have an immediate impact on the global supply-demand balance by releasing trapped capacity back into the market.

Global Trends

Blank sailings continue to underpin supply discipline. November schedules include 86 cancelled sailings—down from 96 in October across the main East–West trades, lifting effective capacity about 3% MoM. As of the time of writing this report, only 47 cancellations and a projected 9% increase in capacity are expected in December. Despite reports of reduced Houthi activity, carriers and insurers still require sustained security assurances before fully restoring Suez routings, making a large-scale return unlikely in the immediate term. Some carriers have begun cautiously testing limited Red Sea transits, but a broader shift would require complex network realignments.



South Asia

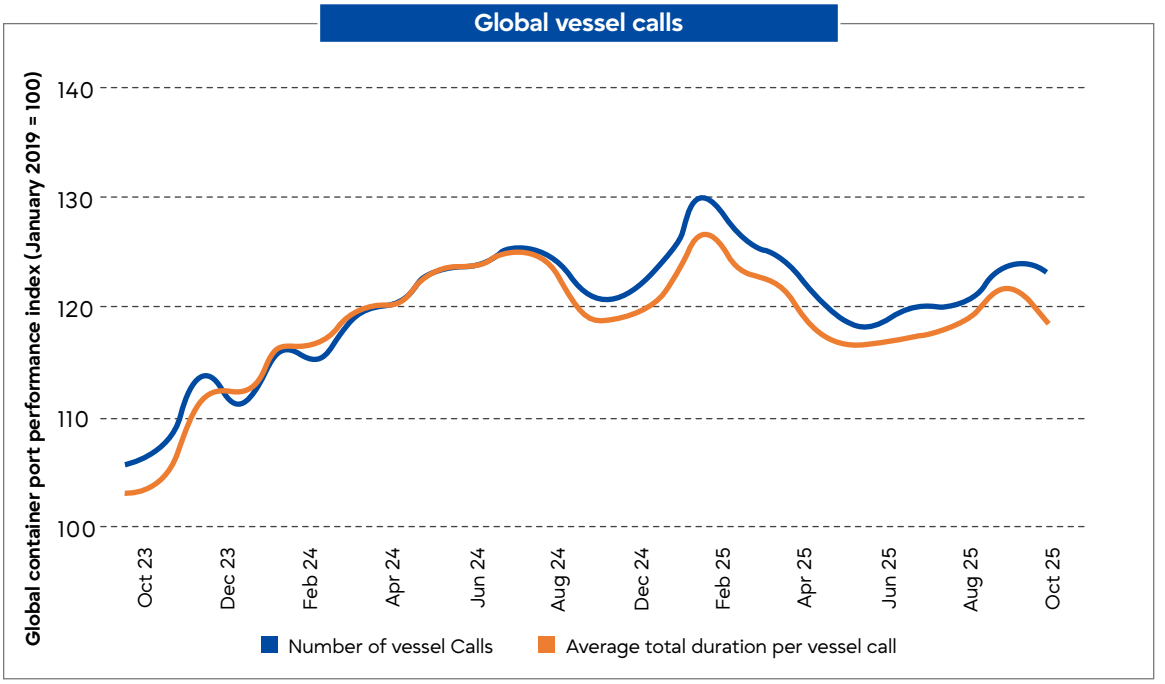
Among all South Asian routes, trade with Europe has significantly increased in the last year; thus, net capacity increased by 25% westbound and 54% eastbound between October 2024 and October 2025. Net capacity increase was also reported on the Asia to South Asia trade by 16% and 12% on eastbound and westbound directions, respectively.

Three new weekly loops added from Asia to South Asia. The average vessel size also increased by 6% in the same trade route. The Gemini Cooperation (a partnership between Maersk and Hapag-Lloyd) has added four new weekly services to the South Asia-Europe route, specifically focusing on increased connectivity between India, the Middle East, and both Northern and Mediterranean Europe.

Ship calls and congestion

The congestion pressure on the global supply chain remained an issue throughout the year at container ports in all regions. Average turnaround time improved slightly in the last quarter of 2024, but it has worsened again at the start of 2025. The Drewry Global Container Port Performance Index improved slightly in October, falling 0.5% MoM to 123.1 points, up 1.8% YoY.

Overall, the global average pre-berth waiting time in October decreased 5.2% MoM to 0.3 day, up 2.5% YoY. Waiting times surged 25% MoM in Europe, led by congestion due to industrial action and an electrical outage in Rotterdam and Antwerp. Overall congestion eased in Greater China, with waiting times falling 18% MoM primarily due to a massive improvement in Shanghai, even as the impact of Super Typhoon Ragasa continues to be felt in the Pearl River Delta ports.



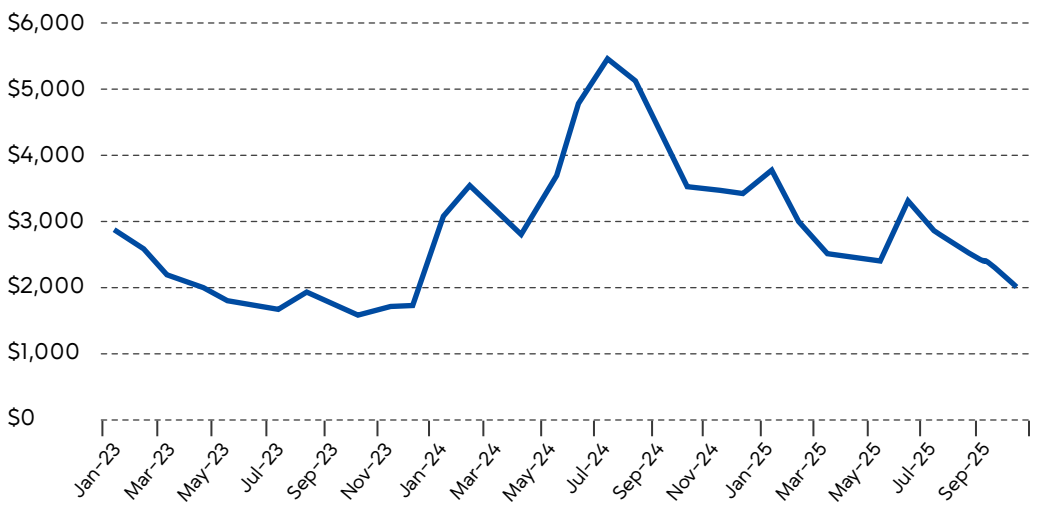
Source: Drewry Maritime Research

Freight rate fluctuations

After reaching record highs in late 2021 to mid-2022, container freight rates continued their downward correction through 2023. The Drewry's Global Freight Rate Index began to recover in January 2024 and reached a yearly peak of $5,474 in early July 2024. However, rates resumed their decline thereafter, with only short periods of temporary improvement.

By October 2025, the index had fallen to $2,071—its lowest point for the year 2024 and 2025. On the major East–West trade lanes, the index reached a high of $6,334 in July 2024, but by October 2025, it had dropped to $1,962, representing a steep decline of nearly 225%.

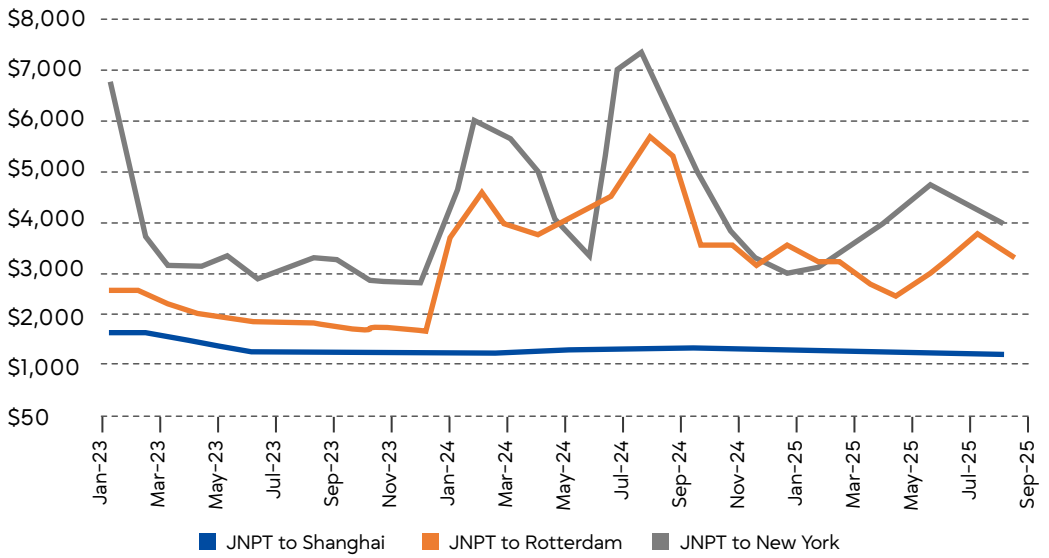
Drewry's Global Freight Rate Index



Source: Container Freight Rate Insight, Drewry Maritime Research

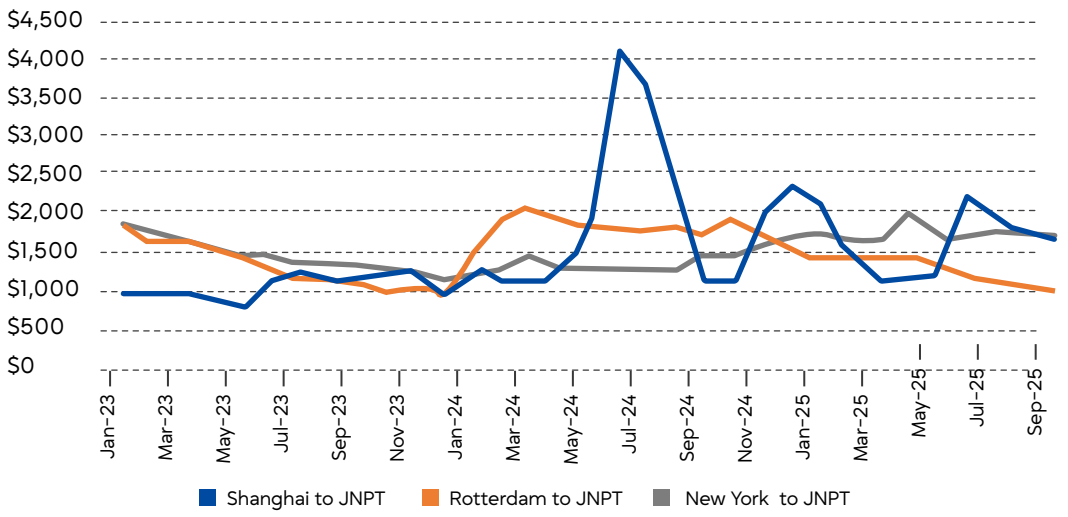
Mirroring the movement in the Global Freight Rate Index, rates for India-origin and India-destined cargo also trended downward through 2024 & 2025. A significant disparity emerged between export and import pricing on key trade lanes in India. Export rates to China remained relatively stable throughout 2025, although they followed a gradual declining trend. In contrast, import rates from China into JNPT surged sharply, jumping by 116.8% within a single month between April and June 2024. Exports to the United States experienced a notable spike in August 2024, when rates from JNPT to New York climbed to $7,142. However, this increase proved short-lived, as prices have softened again during the recent months of 2025.

Indian export rates ($per 40ft box)



Source: Container Freight Rate Insight, Drewry Maritime Research

Indian import rates $per 40ft box

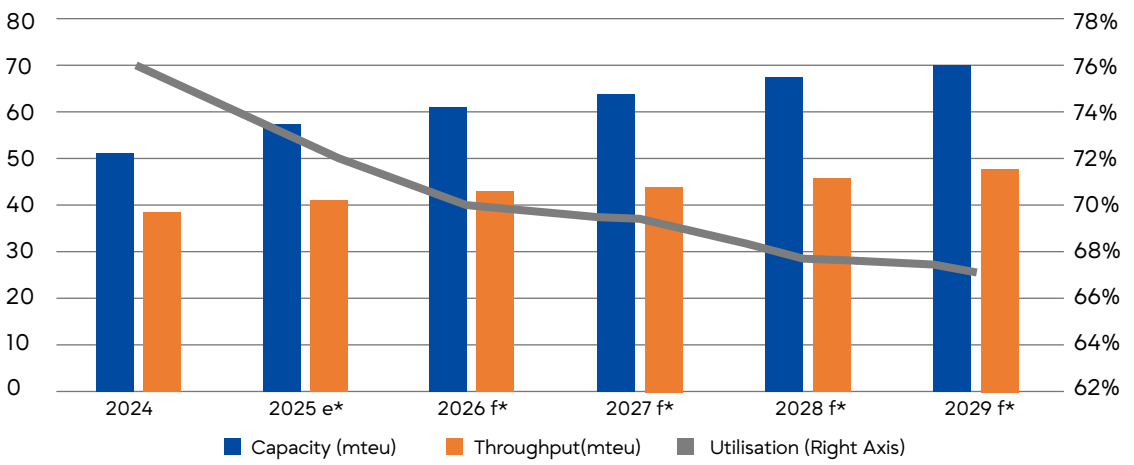


Source: Container Freight Rate Insight, Drewry Maritime Research

Container port capacity in South Asia

In South Asia, container port capacity utilisation stands at around 76% in 2024 and is expected to remain within the 73% range through 2025. However, with substantial new capacity, utilisation levels are projected to decline gradually to around 68% by 2028. Installed capacity across the region is forecast to grow at a CAGR of 6.6% between 2024 and 2029, while throughput is expected to increase at a more moderate CAGR of 4.1% over the same period.

Container port demand-supply projections till 2029

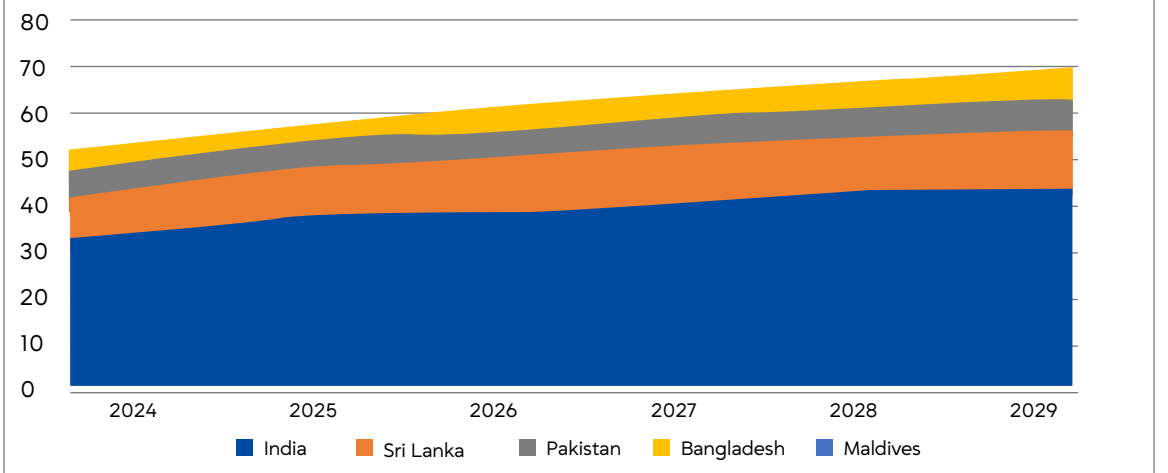


Note: e - estimated, f* - forecast*

Source: Global Container Terminal Operators Annual Review and Forecast, Drewry, 2025

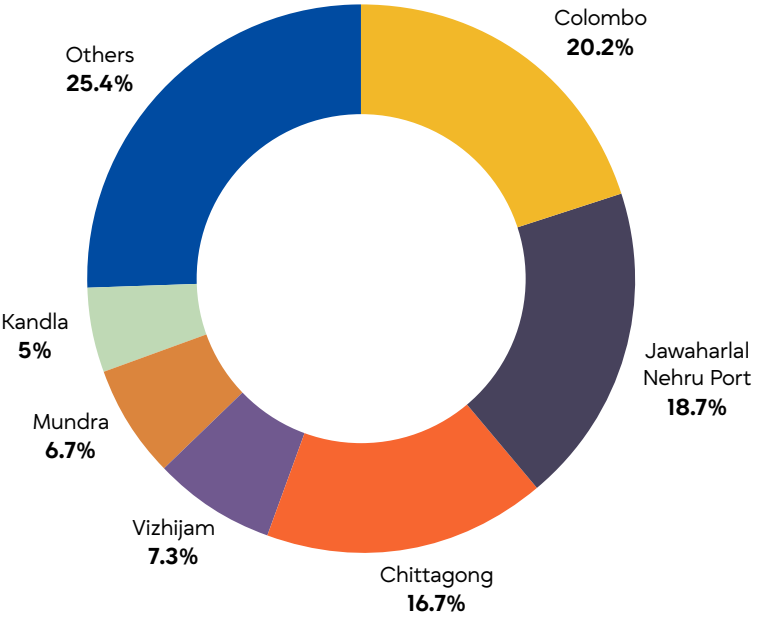
Overall capacity in South Asia is projected to expand by 37.7%, reaching approximately 70.4 mteu by 2028—an increase of 19.27 mteu. Nearly two-thirds of this growth is expected to come from developments at Indian ports, including significant upgrades at Jawaharlal Nehru Port, Mundra, and Vizhinjam, as well as planned deepwater capacity expansion at Kandla. Significant expansion is also underway at Sri Lanka's Port of Colombo, led by the enhancement of the SLPA-operated East Container Terminal and the upcoming Adani-operated West Container Terminal. In November 2025, the Sri Lanka Ports Authority commissioned the second berth of the East Container Terminal, extending the completed quay length to 900 meters, with the remaining 300 meters progressing toward completion. Full operational capacity is expected by the fourth quarter of 2026.

Country-level capacity expansion in South Asia (mteu)



Source: Global Container Terminal Operators Annual Review and Forecast, Drewry, 2025

Port-wise share of South Asia's total capacity expansion 2024-29

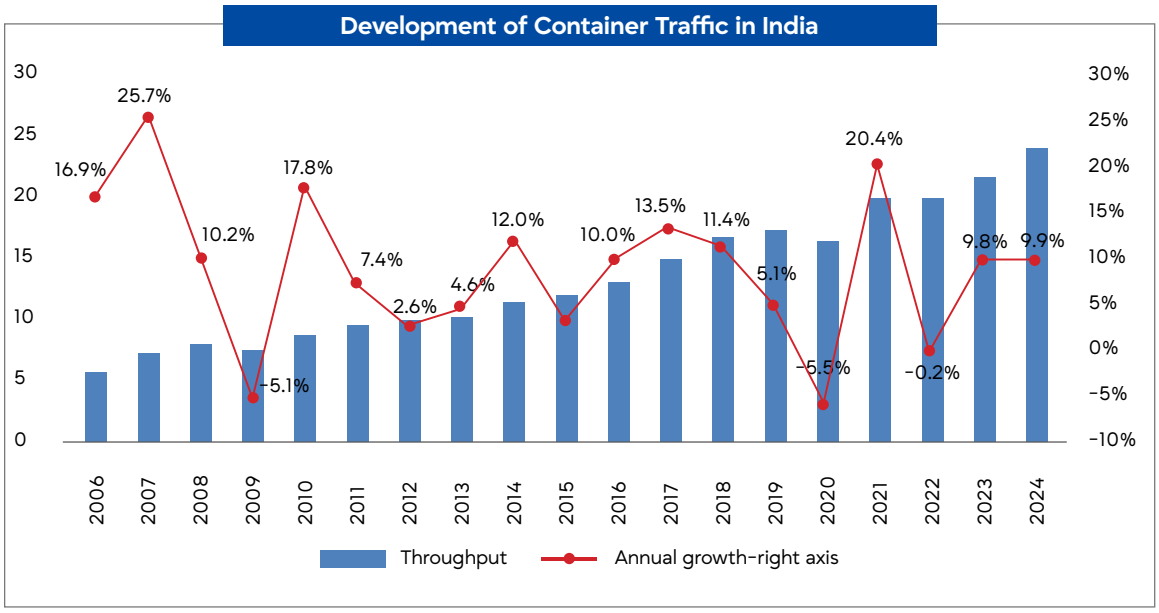


Source: Global Container Terminal Operators Annual Review and Forecast 2024

Indian Container Market Overview

Global container port throughput experienced around a 10% growth in 2024, extending the rebound that began in 2023 after a flat performance in 2022. Indian ports handled around 24 mteu during the year, an increase of nearly 2.2 mteu compared to 2023, marking one of the most substantial annual increases after COVID.

Growth was broadly distributed across major gateways, with most terminals maintaining positive momentum and no notable negative outliers affecting the national picture. The most recent part-year figures (Jan 2025–Oct 2025) suggest that this upward trend is set to continue into 2025, although the pace is expected to moderate to around 6% YoY.



Source: Drewry Maritime Research

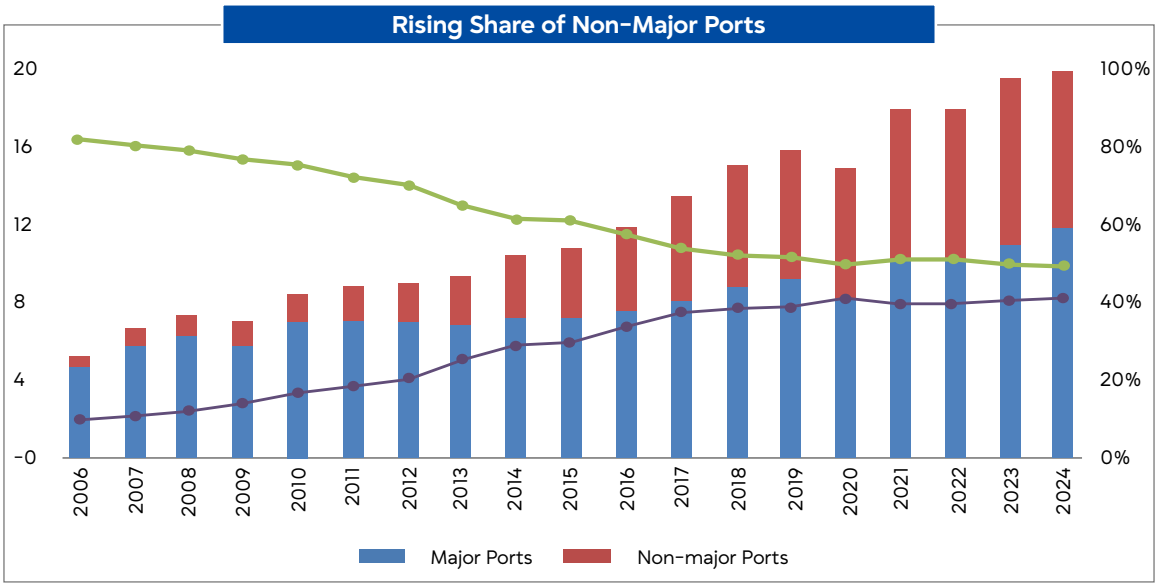
Market Segmentation-2024

Major Vs Non-major ports

In recent years, non-major ports have continued to expand their presence, gradually increasing their share of India's container market. However, major ports still account for approximately 55% of the country's total container throughput, with Jawaharlal Nehru Port (JNPT) maintaining its position as the leading major port, handling around 7 mteu in 2024.

Among non-major ports, Mundra remains the dominant player with a throughput of 8.2 mteu, representing nearly 35% of India's total container traffic. Over the past two decades, non-major ports have consistently grown at a faster pace than major ports, except in 2021. That year, major ports reported a remarkable 23% YoY increase—outpacing the 17% growth at non-major ports—primarily driven by JNPT's exceptional performance of 26% YoY.

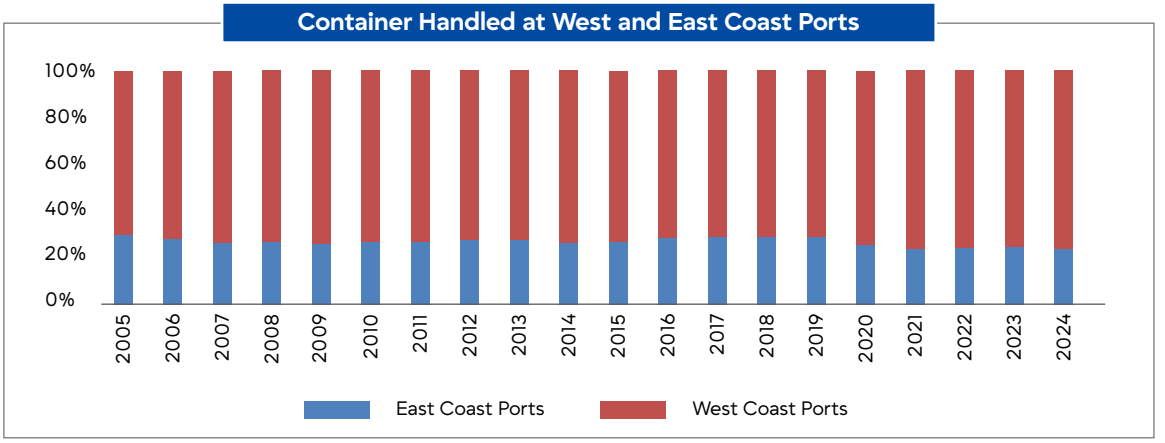
Although major ports continue to lead in absolute volume terms, handling around 13 mteu in 2024 compared with just over 11 mteu at non-major ports, the gap has narrowed significantly. This shifting balance highlights growing competition, operational efficiency improvements, and rising private investment in non-major ports. If current trends persist, a more evenly distributed market structure between major and non-major ports is likely to emerge in the medium term.



Source: Drewry Maritime Research

East coast ports Vs west coast ports

In 2024, West Coast ports continued to dominate India's container traffic, handling around 77–78% of the total throughput, in line with the long-term trend. The East Coast's share remained stable at roughly 22–23%, reflecting gradual growth but no significant shift in the national distribution pattern.

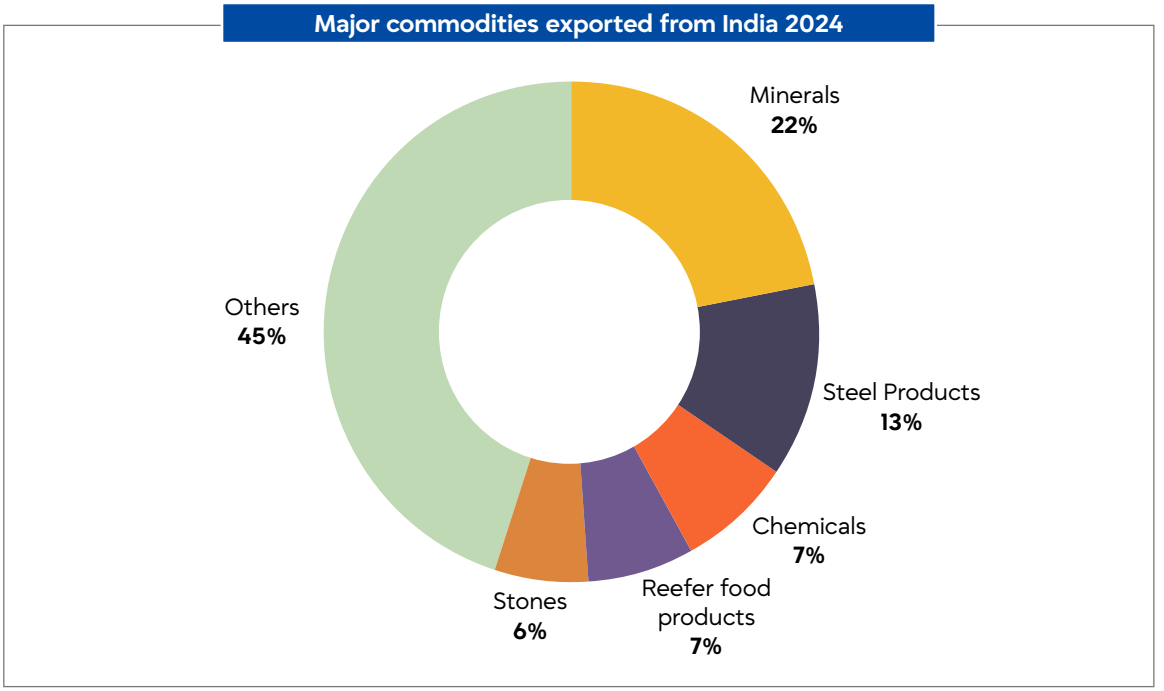


Source: Drewry Maritime Research

Major containerised/containerisable exim cargo

For analysis, we have divided all traded commodities into 33 major categories, including Pharmaceuticals, Fabric/Yarn, Steel Products, Reefer Food Products, and Readymade Garments (RMG)/Textiles. As we do not have precise definitions of containerised and non-containerised cargo from any authoritative source, the data has some subjectivity built in. We have used the cargo volume (in tonnes) as the basis for analysis. In 2024, Minerals further consolidated their position, capturing 22% of India's containerised exports, rising from 18% in 2023, supported by strong global demand. Steel products remained stable at around 13%.

The share of reefer food products dipped slightly to 7%, causing the category to lose its third-place ranking, influenced by factors such as export restrictions, geopolitical challenges, and domestic food security priorities. Chemicals moved up to third position, accounting for 7.4% of total exports. Meanwhile, Stones held its fifth position, although its share fell to 5.9% from 7% in 2023.

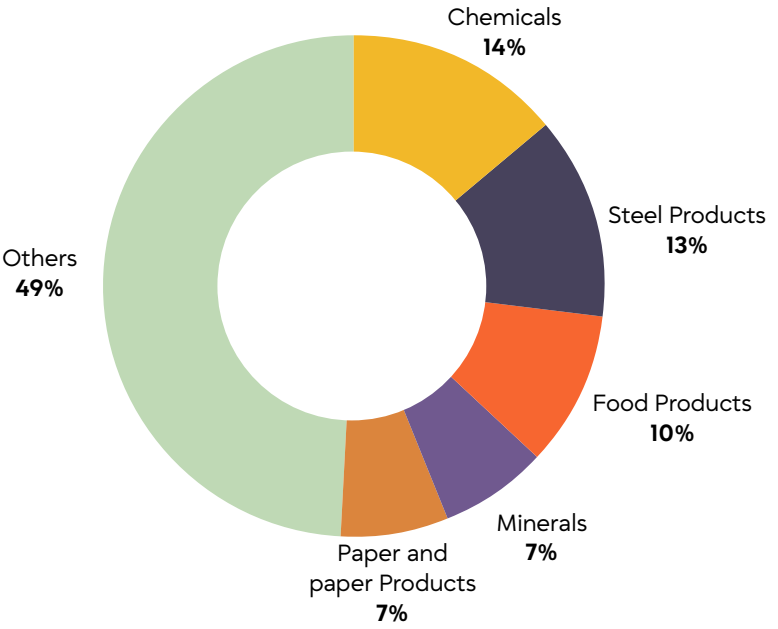


Source: Compiled by Drewry Maritime Research from UN-COMTRADE Database

Among India's major import commodity groups in 2024, Chemicals emerged as the largest segment with a 14% share, supported by India's capability to supply cost-efficient generics and speciality chemicals. Key importing markets included the USA, UK, and Brazil. The sector's growth was further reinforced by the government initiatives such as Production-Linked Incentive (PLI) schemes and the development of Petroleum, Chemicals, and Petrochemical Investment Regions (PCPIRs). Steel products moved to second place, although they retained a stable 13% share.

Food products, including edible oils, pulses, grains, and perishables, held the third position at 10%, primarily driven by the government's strategic increase in pulse imports—particularly duty-free yellow peas—to increase domestic supply and curb rising retail prices. Minerals entered the top five import categories in 2024, with a 7.2% share, driven by strong demand for downstream products, such as lithium-ion battery packs.

Major commodities imported by India 2024



Source: Compiled by Drewry Maritime Research from UN-COMTRADE Database

Major Trade Partners

India's Top 20 export destinations in 2024

Country	2014 Rank	2024 Rank	Trend	Share in India's total exports
China	1	1	→	15.5%
Bangladesh	3	2	↑	11.0%
United States	2	3	↓	8.3%
United Arab Emirates	4	4	→	4.7%
Korea, Rep.	6	5	↑	4.0%
Nepal	7	6	↑	4.0%
Saudi Arabia	8	7	↑	3.1%
Vietnam	5	8	↓	2.9%
Italy	13	9	↑	2.6%
United Kingdom	12	10	↑	2.2%
Indonesia	9	11	↓	2.2%
Malaysia	11	12	↓	2.0%
Japan	16	13	↑	1.6%
Thailand	14	14	→	1.6%
Sri Lanka	17	15	↑	1.4%
Other Asia, nes	22	16	↑	1.4%
Belgium	19	17	↑	1.3%
Spain	26	18	↑	1.3%
Netherlands	20	19	↑	1.2%
Germany	21	20	↑	1.2%

Source: Compiled by Drewry Maritime Research from UN-COMTRADE Database

In 2024, China became the leading export destination for India, capturing a 15.5% share, up from second position in 2023 and surpassing Bangladesh, which slipped to second place with an 11.0% share. This shift was supported by strong demand for Indian raw materials, intermediates, and industrial goods, alongside improving trade ties and supply chain realignments. The United States remained India's third-largest export market, with its share increasing to 8.3% from 7.8% in 2023, primarily driven by higher shipments of pharmaceuticals, engineering goods, and IT-enabled products. The UAE retained fourth place at 4.7%, whereas Vietnam rose sharply from eighth to fifth position over the last decade. Conversely, Korea, Nepal, and Saudi Arabia each dropped one rank due to softer demand and shifting sourcing patterns.

Over the last decade, Vietnam (+3 ranks) and Indonesia (+2 ranks) have been the most notable climbers, supported by stronger regional trade frameworks and rising industrial activity. On the other hand, Spain (-8) and Italy (-4) saw the largest declines, reflecting weaker European demand and slower economic growth.

India's Top 20 import sources in 2024

Country	2014 Rank	2024 Rank	Trend	Share in India's total exports
China	1	1	→	16.5%
Russian Federation	11	2	↑	5.5%
United States	3	3	→	5.3%
Indonesia	2	4	↓	5.1%
United Arab Emirates	6	5	↑	4.5%
Saudi Arabia	7	6	↑	4.2%
Korea, Rep.	5	7	↓	4.0%
Malaysia	4	8	↓	3.5%
Oman	12	9	↑	3.1%
Brazil	15	10	↑	3.0%
Canada	8	11	↓	3.0%
Thailand	9	12	↓	2.9%
Japan	13	13	→	2.8%
Australia	26	14	↑	1.9%
Vietnam	24	15	↑	1.9%
Argentina	17	16	↑	1.8%
Bhutan	64	17	↑	1.7%
United Kingdom	20	18	↑	1.6%
Qatar	23	19	↑	1.6%
Other Asia, nes	21	20	↑	1.3%

Source: Compiled by Drewry Maritime Research from UN-COMTRADE Database

In 2024, China remained India's largest import partner, accounting for 16.5% of total imports. Russia climbed to second place, rising from fourth in 2023 and marking a significant gain of nine ranks since 2014, primarily driven by an increase in food product imports.

The United States slipped to third place with a 5.3% share, down from 6.1% in 2023, reflecting softer demand and shifting sourcing dynamics. Meanwhile, Indonesia's share continued to decline, dropping substantially from its position as the second-largest import source a decade ago.

Top Commodity Partner Matrix

As discussed above, Minerals are the product group which has the highest share in India's exports. Close to 70% of the total minerals' exports are concentrated in the top five countries. They are: China, Korea, Japan, Indonesia and Bangladesh.

India's top exported products and their respective top destinations, 2024 (million tonnes)

Country	Rank 1	Rank 2	Rank 3	Rank 4	Rank 5	World Exports	Top 5 share
Minerals	China	Korea, Rep.	Japan	Indonesia	Bangladesh		
	3.2	0.8	0.3	0.3	0.2	6.8	69.3%
Steel Products	Italy	Nepal	United States	United Arab Emirates	United Kingdom		
	0.5	0.4	0.4	0.3	0.2	3.8	45.3%
Chemicals	Saudi Arabia	United States	United Arab Emirates	Bangladesh	China		
	0.2	0.2	0.1	0.1	0.1	2.3	36.3%
Reefer food products	Bangladesh	United Arab Emirates	United States	Nepal	Iraq		
	0.3	0.2	0.2	0.1	0.1	2.1	41.4%
Stones	China	Bangladesh	Maldives	United States	United Kingdom		
	0.7	0.6	0.2	0.1	0.0	1.8	91.3%
Ores And Concen-trates	Bangladesh	Nepal	Saudi Arabia	Bhutan	Sri Lanka		
	1.1	0.1	0.1	0.0	0.0	1.4	94.5%
Fabric/Yarn	Bangladesh	China	United States	Turkey	Vietnam		
	0.2	0.2	0.1	0.1	0.0	1.1	53.7%
Sugar	Sudan	Libya	Somalia	Bangladesh	Tanzania		
	0.1	0.1	0.1	0.1	0.1	1.0	47.7%
Ceramic products	United States	United Arab Emirates	Russian Federation	Iraq	United Kingdom		
	0.1	0.1	0.1	0.0	0.0	1.0	28.2%
Polymer and Polymer products	United States	United Arab Emirates	Nepal	China	Bangladesh		
	0.2	0.1	0.1	0.1	0.0	1.0	37.6%

Source: Compiled by Drewry Maritime Research from UN-COMTRADE Database

Steel products are the second largest exported product in 2024. The US, Nepal and Italy are the major demand drivers for Indian steel products, followed by the UAE and the UK. These countries import around 45.3% of the steel products that India exports. In 2024, Chemicals was the third largest exported commodity from India with Saudi Arabia, US and UAE as main trading partners. The fourth-ranked export commodity was Reefer food products, where Bangladesh was the leading trading partner in 2024. Stones remained at the 6th rank, with a share of more than 72% from only two countries, China and Bangladesh.

India's top imported products and their respective top destinations, 2024 (million tonnes)

In 2024, India's containerised imports were dominated by Chemicals and Steel Products, sourced mainly from China and the United States. Food Products exhibited a high level of concentration, with 82% of imports coming from just five countries—Indonesia, Argentina, Malaysia, Russia, and Ukraine. Mineral imports were primarily supplied by regional and Gulf partners, including the UAE, Bhutan, and Oman. Overall, the top five importing countries accounted for 85% of India's total containerised imports. Paper & Paper Products and Polymers showed a more balanced sourcing pattern, reflecting moderate diversification. In contrast, categories such as Ceramics and Sugar remained highly dependent on only one or two key origins. The bulk of ceramic imports came from China, while sugar imports were almost entirely sourced from Brazil.

India's top imported products and their respective top destinations, 2024 (million tonnes)

Country	Rank 1	Rank 2	Rank 3	Rank 4	Rank 5	World Exports	Top 5 share
Chemicals	China	Saudi Arabia	United States	Iran, Islamic Rep.	Kuwait		
	4.9	2.2	2.2	1.7	1.4	24.0	51.5%
Steel Products	China	Korea, Rep.	Japan	United States	United Kingdom		
	4.0	3.2	2.2	1.4	1.1	23.1	51.6%
Food Products	Indonesia	Argentina	Malaysia	Russian Federation	Ukraine		
	4.8	3.1	3.0	2.3	1.2	17.6	81.9%
Minerals	United Arab Emirates	Bhutan	Oman	China	Qatar		
	4.8	2.7	1.9	0.7	0.6	12.5	85.1%
Paper and Paper Products	United States	Canada	United Kingdom	South Africa	China		
	2.4	1.2	0.9	0.8	0.8	11.9	51.1%
Polymer and Polymer products	China	Korea, Rep.	Saudi Arabia	United States	United Arab Emirates		
	2.1	1.3	1.3	1.1	1.0	11.8	56.8%
Reefer food products	Canada	Russian Federation	Myanmar	Australia	Tanzania		
	2.0	1.2	1.1	0.9	0.6	10.2	56.3%
Ceramic products	China	Germany	Malaysia	Italy	Spain		
	7.5	0.4	0.0	0.0	0.0	8.1	98.2%
Wood & wood products	Australia	Uruguay	Nepal	New Zealand	Vietnam		
	1.1	1.0	0.7	0.5	0.4	5.6	67.0%
Sugar	Brazil	Germany	France	Nepal	United States		
		0.0	0.0	0.0	0.0	3.5	97.9%

Source: Compiled by Drewry Maritime Research from UN-COMTRADE Database

Indian Container Terminals Performance – Throughput (TEUs) Vs Y-O-Y Growth (%) In FY (2025)

Growth Y-O-Y (%) (FY 2025)	Low	Medium	High
High	PICT, HICT, NSDT	AKICT, CCT, ICTT	APMT-M, MICT, BMCT, AMCT 2 Ext
Medium		NSFT, DBGT, CIT	NSICT
Low	KICT, NMCT, TCT, INKRI, KCT, KPD	AHCT, APMT-P, AECT, VCT, AKCT	AICT, ACMT, NSIGT, AMCT

Throughput (TEUs), FY 2025

High Growth Terminals

High Throughput, High Growth Terminals:
APMT-M, MICT, BMCT, AMCT 2 Ext

Medium Throughput, High Growth Terminals:
AKICT, CCT, ICTT

Low Throughput, High Growth Terminals:
PICT, HICT, NSDT

	Throughput (TEUs)	Growth (Y-O-Y)(%)
High	>500,000	>10%
Moderate	100,000 - 500,000	1%-10%
Low	<100,000	<1%

APMT-M -APM Terminals Mumbai
AICT -Adani International Container Terminal
AMCT -Adani Mundra Container Terminal
AMCT2 Ext -Adani Mundra Container Terminal 2 Extension
ACMT -Adani CMA Mundra Terminal
MCT -Mundra International Container Terminal
NSICT -Nhava Sheva International Container Terminal
NSIGT -Nhava Sheva India Gateway Terminal
APMT-P -APM Terminals - Pipavav
BMCT -Bharat Mumbai Container Terminals
NSFT -Nhavasheva Free Port Terminal
NSDT -Nhavasheva Distribution Terminal
AKICT -Adani Kattupalli International Container Terminal
ICTT -Vallarpadam International Container Transhipment Terminal
AHCT -Adani Hazira Container Terminal
INKRI -Adani Krishnapatnam Container Terminal
VCT -Visakha Container Terminal
CIT -Chennai International Terminal
CCT -Chennai Container Terminal
AECT -Adani Ennore Container Terminal
KICT -Kandla International Container Terminal
TCT -PSA SICAL Tuticorin Container Terminal
DBGT -Dakshin Bharat Gateway Terminal
AKCT -Adani Kolkata Container Terminal
KPD -Kolkata Port Dock
HICT -Haldia International Container Terminal
KCT -Kakinada Container Terminal
PICT -Paradip International Container Terminal
NMCT -New Mangalore Container Termina

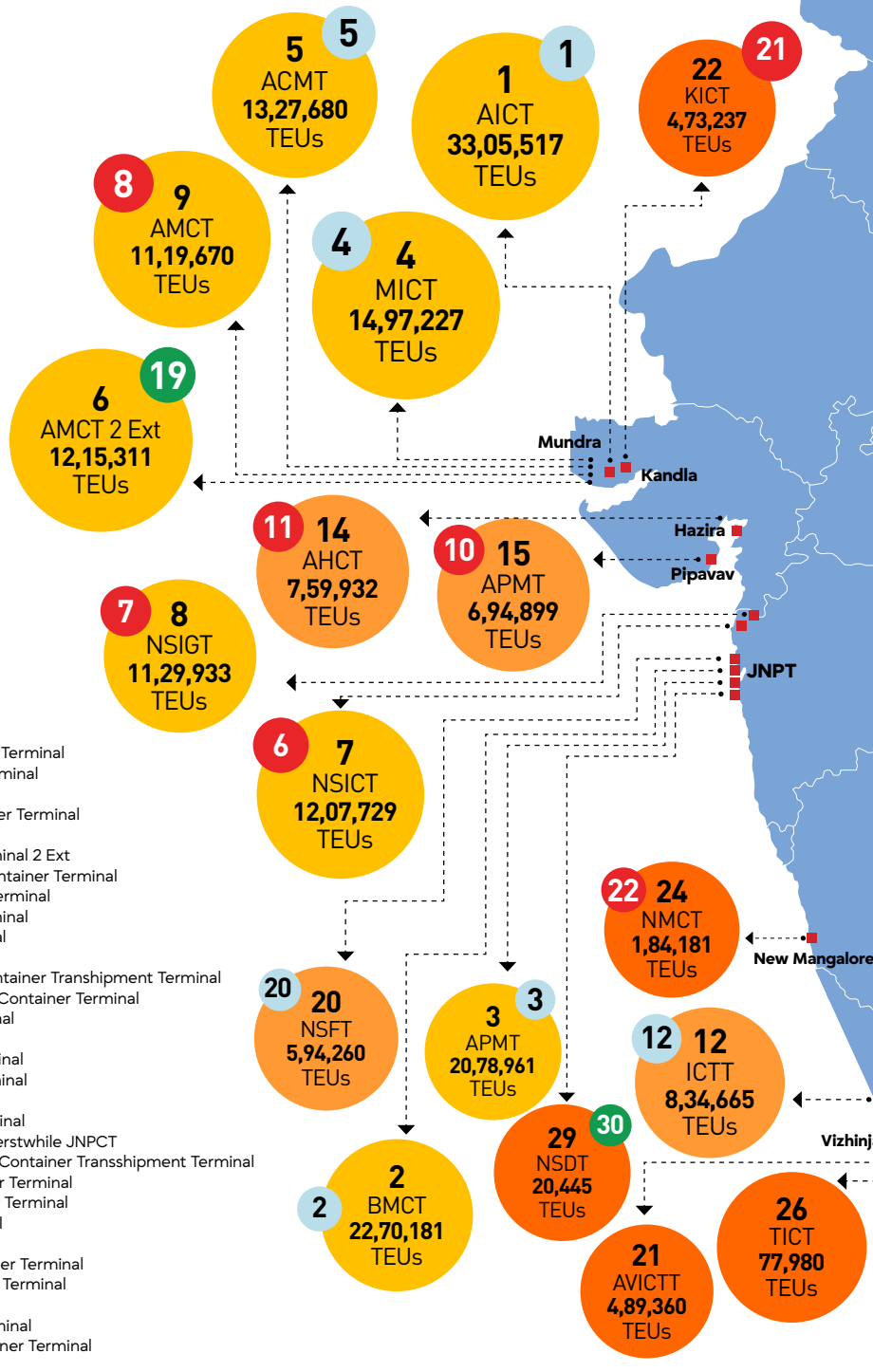
INDIAN CONTAINER TERMINAL DATA SHEET FOR THE FY-2025

S.NO	Container Terminal Name	Operated by	Port Name	Year of Commis-sion	Draft (m)	Berths	Quay Length (m)	Yard Area (Hect-ares)	Total Ground Slots (TGS)
1	APM Terminals Mumbai	APM Terminals and CONCOR	Jawaharlal Nehru Port	2006	14.0	2	840	63.00	9,723
2	APM Terminals Pipavav	APM Terminals Pipavav	Gujarat Pipavav Port Ltd	2002	14.8	2	735	36.00	7,000
3	Adani CMA Mundra Terminal - CT4	APSEZ Ltd and CMA CGM SA	APSEZ Pvt Ltd Mundra	2017	16.5	2	650	28.00	6,500
4	Adani Mundra Container Terminal 2	APSEZ Pvt Ltd	APSEZ Pvt Ltd Mundra	2007	17.5	2	631	16.70	4,014
5	Adani Mundra Container Terminal 2 Ext	APSEZ Pvt Ltd	APSEZ Pvt Ltd Mundra	2018	NA	2	650	NA	NA
6	Adani Hazira Container Terminal	APSEZ Pvt Ltd	Hazira Port	2012	14.5	2	637	20.00	6,500
7	Adani Krishnapatnam Port Container Terminal	APSEZ Pvt Ltd	Adani Krishnapat-nam Port	2012	18.5	2	725	15.00	4,600
8	Adani Kattupalli International Container Terminal	APSEZ Pvt Ltd	Adani Kattupalli Port	2013	14.5	2	710	20.00	7,000
9	Adani Vizhinjam International Container Transshipment Terminal	APSEZ Pvt Ltd	Vizhinijam Port	2024	20	2	800	80	6000
10	Adani Gangavaram Container Terminal	APSEZ Pvt Ltd	Gangavaram Port	2024	15	1	350	25	3000
11	Adani Ennore Container Terminal	APSEZ Pvt Ltd & Mundi MSC	Kamarajar Port	2017	18.0	1	400	15.00	4000
12	Adani International Container Terminal -CT3 and Ext	APSEZ Pvt Ltd and MSC S A	APSEZ Pvt Ltd Mundra	2012	17.5	4	1460	146.00	3,903
13	Kakinada Container Terminal	Bothra Shipping, Kakinada Infrastruc-ture Holdings, PSA Chennai	Kakinada Deep Water Port	2015	14.5	1	300	5.00	400
14	Dakshin Bharat Gateway Terminal	Dakshin Bharat Gateway Terminal Pvt Ltd	V.O. Chidambara-nar Port	2014	14.2	1	345	6.50	8260
15	Mundra International Container Terminal -CT1	DP World	APSEZ Pvt Ltd Mundra	2003	15	2	632	25.00	5,400
16	Nhava Sheva International Contain-er Terminal	DP World	Jawaharlal Nehru Port	1999	14.0	2	600	25.84	6,222
17	Nhava Sheva India Gateway Terminal	DP World	Jawaharlal Nehru Port	2015	16.2	1	330	27.00	NA
18	Vallarpadam International Container Transhipment Terminal	DP World	Cochin Port	2011	16	2	950	65.00	10000
19	Chennai Container Terminal	DP World	Chennai Port	2001	13.5- 15	4	885	21.00	8000
20	Kandla International Container Terminal	J M Baxi & Co.	Deendayal Port	2016	13.0	2	545	18.74	2,916
21	Paradip Port - Containers	J M Baxi & Co.	Paradip Port	2018	14.5	2	450	4.80	NA
22	Visakha Container Terminal 1 &2	J M Baxi & Co.	Visakapatnam Port	2003 & 2022	16.5	3	845	24.00	2500
23	Haldia International Container Terminal	J M Baxi & Co.	Haldia Port	1977	8.5	2	432	9.00	1,350
24	Tuticorin Internation Container Terminal	J M Baxi & Co.	V.O. Chidambara-nar Port	2025	14.2	1	370	5.39	1800
25	Nhava Sheva Distribution Terminal (NSDT)	J M Baxi & Co.	Jawaharlal Nehru Port	2023	10.7	2	320	9	NA
26	Nhavasheva Free Port Terminal - Erstwhile JNPCT	J M Baxi-CMA Terminals	Jawaharlal Nehru Port	1989	15	2	680	61.49	10,482
27	Mangalore Container Terminal	JSW	New mangalore Port	2022	14.0	1	350	15.50	NA
28	Chennai International Terminal	PSA Chennai	Chennai Port	2009	15.5	3	832	35.00	7500
29	Bharat Mumbai Container Terminal	PSA International	Jawaharlal Nehru Port	2018	16.5	3	2000	100.00	12,500
30	Bharat Kolkata Container Terminal	PSA International	Syama Prasad Mookerjee Port	1979	8.5	5	812	13.30	3,000
31	PSA SICAL Tuticorin Container Terminal	Sical and PSA International	V.O. Chidambara-nar Port	1999 - Exit in Mar 2025	11.9	1	370	4	1,000

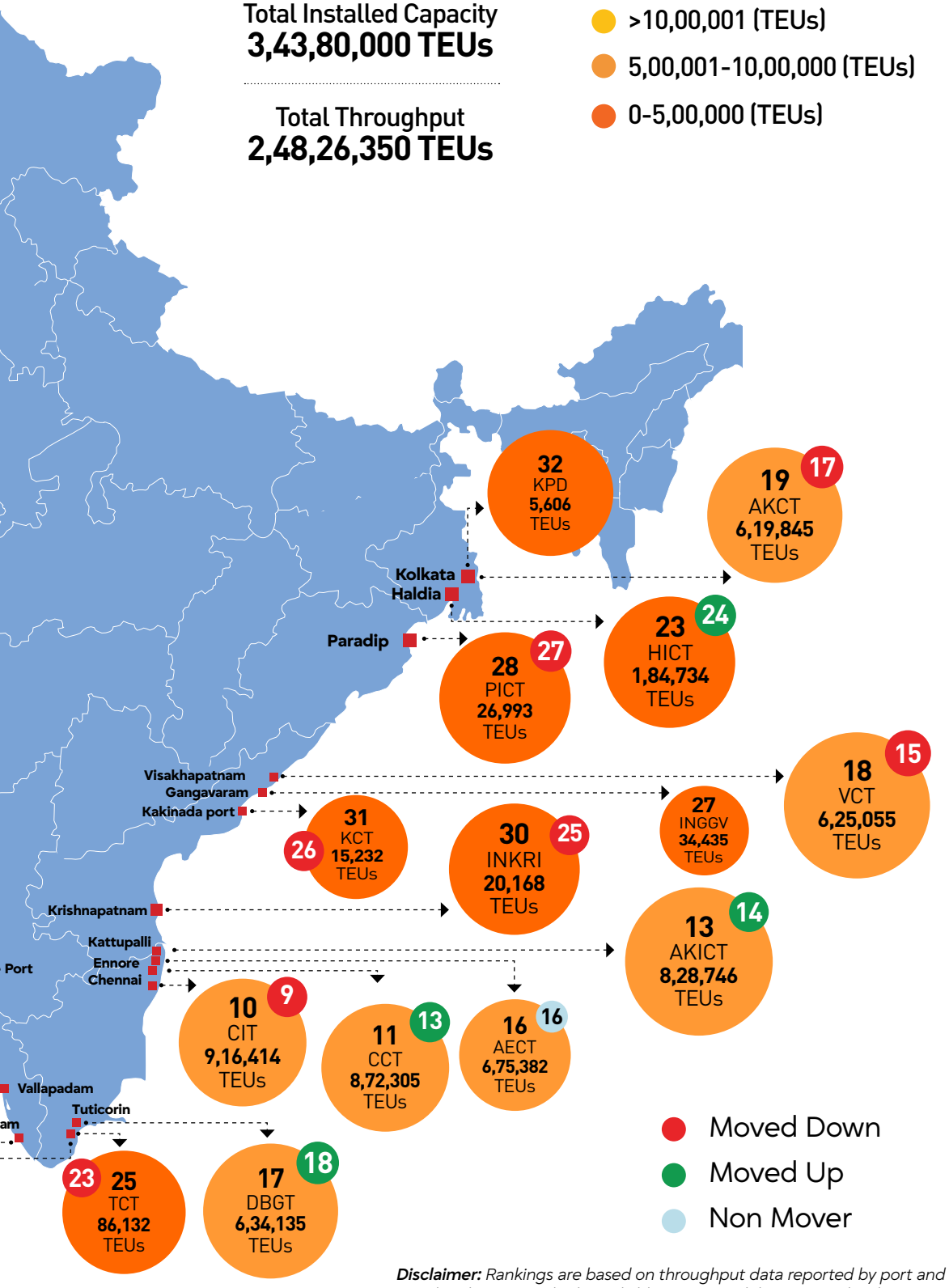
Reefer Plugs (Number)	Quay Cranes	Rubber Tyred Gantry Cranes (RTGC)	Rail Mounted Gantry Cranes (RMGC)	Reach Stackers	Fork Lifts	Installed Capacity (TEUs)2024-25	Throughput TEUs(2024-25)	Capacity Utilization(%)	Growth Rate (%)	Crane Productivity (Moves per hour)
980	11 Post Panamx	45	3	2	6	22,00,000	20,78,961	94.5%	31%	39.9
525	8 Post Panamax	20	4	3	2	13,50,000	6,94,899	51.5%	-14%	52.6
400	6 Super Post Panamax	12	NA	NA	NA	13,00,000	13,27,680	102.1%	1%	30-35
366	6 Super Post Panamax	20	NA	3	NA	13,00,000	11,19,670	86.1%	3%	35.0
NA	3 Super Post Panamax	NA	NA	NA	NA	5,00,000	12,15,311	243.1%	115%	35.0
300	8 Super Post Panamax	24	NA	2	NA	10,00,000	7,59,932	76.0%	-5%	30-35
400	5 Super Post Panamax	14	NA	10	12	20,00,000	20,168	1.0%	-82%	35-45
360	8 Super Post Panamax	24	NA	3	4	12,00,000	8,28,746	69.1%	16%	35-45
400	8 Super Post Panamax	24	NA	4	NA	10,00,000	4,89,360	48.9%	New	30.1
150	3 Panamax	9	NA	NA	NA	5,00,000	34,435	6.9%	New	25-35
NA	4 Super Post Panamax	12	NA	1	NA	8,00,000	6,75,382	84.4%	1%	34.3
1320	17 Super Post Panamax	51	3	3	NA	34,00,000	33,05,517	97.2%	5%	30-35
90	2 Mobile Harbour Cranes	0	0	2	NA	2,00,000	15,232	7.6%	-48%	18-25
112	3 Cranes	9	0	2	1	7,50,000	6,34,135	84.6%	5%	32.0
366	5 Super post panamax and 2 post panamax	31	2	2	4	14,00,000	14,97,227	106.9%	14%	49.5
778	8 Super Post Panamax	26	3	3	2	12,00,000	12,07,729	100.6%	7%	28.9
336	4 Super Post Panamax	17	Nil	1	NA	8,00,000	11,29,933	141.2%	2%	38.4
486	7 Super Post Panamax	21	3	3	NA	14,00,000	8,34,665	59.6%	11%	31.0
400	4 Super Post Panamax and 5 Post Panamax	23	3	2	1	16,00,000	8,72,305	54.5%	18%	30-35
104	5 Super Post Panamax	8	NA	6	3	7,50,000	4,73,237	63.1%	1%	NA
96	3 Mobile Harbour Crane	2	NA	7	26	2,00,000	26,993	13.5%	102%	30.0
654	9 Super Post Panamax	19	NA	7	3	13,50,000	6,25,055	46.3%	-7%	27.5
24	2 Panamax +1 Quay cranes	4	NA	3	NA	3,00,000	1,84,734	61.6%	67%	18-25
210	3 Post Panamax	9	0	1	NA	7,20,000	77,980	10.8%	New	30.0
NA	Mobile Harbour Cranes	NA	NA	NA	NA	20,000	20,445	102.2%	157%	NA
576	5 Super Post panamax and 4 post panamax	28	3	2	3	18,00,000	5,94,260	33.0%	6%	24.5
150	3 Mobile Harbour cranes	NA	NA	8	NA	2,40,000	1,84,181	76.7%	-6%	25.0
350	4 Super Post Panamx and 3 Post Panamax	20	NA	6	NA	15,00,000	9,16,414	61.1%	8%	30-35
1620	24 Super Post Panamax	72	8	NA	NA	24,00,000	22,70,181	94.6%	12%	175.0
NA	4 Mobile Harbour Cranes	NA	NA	9	NA	8,50,000	6,19,845	72.9%	-3%	20-30
84	3 Post Panamax	8	0	2	1	4,50,000	86,132	19.1%	-41%	NA

INDIAN CONTAINER TERMINAL RANKING BY Volume

FY 2024-2025



AICT – Adani International Container Terminal
BMCT – Bharat Mumbai Container Terminal
APMT – APM Terminals Mumbai
MICT – Mundra International Container Terminal
ACMT T4 – Adani CMA Mundra Terminal
AMCT T2 – Adani Mundra Container Terminal 2 Ext
NSICT – Nhava Sheva International Container Terminal
NSIGT – Nhava Sheva India Gateway Terminal
AMCT – Adani Mundra Container Terminal
CIT – Chennai International Terminal
CCT – Chennai Container Terminal
ICTT – Vallarpadam International Container Transhipment Terminal
AKICT – Adani Kattupalli International Container Terminal
AHCT – Adani Hazira Container terminal
APMTP – APM Terminals Pipavav
AECT – Adani Ennore Container Terminal
DBGT – Dakshin Bharat Gateway Terminal
VCT – Visakha Container Terminal
AKCT – Adani Kolkata Container Terminal
NSFT – Nhava Sheva Freeport-NSFT erstwhile JNPCT
AVICTT – Adani Vizhinjam International Container Transshipment Terminal
KICTL – Kandla International Container Terminal
HICT – Haldia International Container Terminal
NMCT – Mangalore Container Terminal
TCT – Tuticorin Container Terminal
TICT –Tuticorin International Container Terminal
INGGV – Adani Gangavaram Container Terminal
PICT – Paradip Port - Containers
NSDT – Nhava Sheva Distribution Terminal
INKRI – Adani Krishanapatnam Container Terminal
KCT – Kakinada Container Terminal
KPD – Kolkata Port Dock



Disclaimer: *Rankings are based on throughput data reported by port and terminal authorities and other reliable sources. While accuracy has been prioritized, Maritime Gateway accepts no responsibility for any errors or misrepresentation in the data presented.*

SOUTH ASIA CONTAINER TERMINAL DATA SHEET FOR THE FY - 2025

COUNTRIES	Container Terminal Name	Operated by	Port	Year of Commis-sion	Draft (m)	Berths	Quay Length (m)	Installed Capacity (TEUs)
BANGLADESH	Chittagong Port Terminals (GCB+CCT+NCT+NCY+S-CY+NOY)	Chittagong Port Authority	Chittagong port	1954-2007	8.5-9.2	21	3,550	6,92,780
	Pangaon Inland Container Terminal	Bangladesh Inland Water Transport Authority (BIWTA) & MEDLOG SA	Chittagong port	2013	4.5	2	180	1,16,000
	Mongla Port Containers	Mongla Port Authority	Mongla Port	2010	9.5	1	225	2,00,000
	Kamalapur ICD, Dhaka	Bangladesh Inland Water Transport Authority (BIWTA)	Chittagong Port	1987	NA	NA	NA	90,000
MALDIVES	Male Commercial Harbour	Maldives Port Limted	Port of Male	1986	WLB - 3.5m ELB - 3.5m Berth(NP) - 9m	3	WLB - 270m NP - 101	NA
	Hulhumale Terminal	Maldives Port Limted	Port of Male	2013	5.5	1	473	NA
	Kulhudhufushi Regional Port	Kulhudhufushi Port Limited	Port of kulhudhufushi city	2005	6.6	1	200	NA
	Hithadhoo Regional Port	Hithadhoo Port Limited	Port of Addu city	2005	7.5	1	130	NA
MYANMAR	MIP Container terminal	Myanmar Industrial Port	Yangon Port	2003	13	4	exist-ing-310m P1-600m P2-1200m	5,00,000
	Mayanmar International terminal thilawa	Hutchison group	Yangon Port	1997	9	5	1000	8,15,556
	Asia world port terminal	Asia World Port Management Co., Ltd (AWPM)	Yangon Port	1996	9	4	852	3,00,000
	TMT Ports	KT Services & Logistics Co.,Ltd	Yangon Port	2016	9	3	457	3,500
	Htee Tan Port Terminal	AWPM (entrusted by Shwe Nar Wah Co., Ltd)	Yangon Port	2012	9	2	616	3,00,000
	Ahlone Inernational Port Terminal	MYANMAR ECONOMIC COROPRATION	Yangon Port	2015	9	3	600	50,000
NEPAL	Birgunj ICD	Himalayan Terminal Pvt Ltd for ICD;Nepal Intermodal Transport Development Board for ICP	NA	2001	NA	NA	NA	~150,000-180,000
SRI LANKA	East Container Terminal	Sri Lanka Ports Authority (SLPA)	Colombo Port	2015	18	3	1096	29,00,000
	Jaya Container Terminal	Sri Lanka Ports Authority	Colombo Port	1985	15	6	1,642	
	Unity Container Terminal	Sri Lanka Ports Authority	Colombo Port	2004	10.5	3	590	
	South Asia Gateway Terminal	John Keells Holdings, Maersk/APM Terminals, SLPA and Evergreen Marine Corporation	Colombo Port	1999	14.5	3	940	18,00,000
	Colombo International Con-tainer Terminal	China Merchants Port Holdings Company(85%) and SLPA	Colombo Port	2014	18	4	1200	33,00,000
	Colombo West International Terminal (CWIT)	Adani-John Keells Holdings consortium	Colombo Port	2025	20	4	1400	16,00,000
PAKISTAN	Qasim International Container Terminal	DP World	Qasim Port	1997	12	3	610	9,00,000
	Qasim International Container Terminal- T2	DP World	Qasim Port	2011	13	2	715	11,75,000
	Pakistan International containter Terminal	International Container Terminal Services, Inc.	Karachi Port	2002	13.5	2	600	7,50,000
	Karachi Internantional Container Terminal	Hutchison Port holding(HPH)	Karachi Port	1996	13.5	3	963	7,00,000
	South Asia Pakistan Terminal	Hutchison Port holding (HPH)	Karachi Port	2017	16.5	4	1500	31,00,000
	Gwadar Container Terminal	China Overseas Ports Holding Company	Gwadar Port	2007	12.5	3	602	2,00,000

Note:

- *Throughput FY (2024-25)* -> FY 2025 period varies country to country, Bangladesh: July 2024-June 2025, Maldives: May 2024-May 2025, May*
- *MHC** -> Mobile Harbout Cranes*

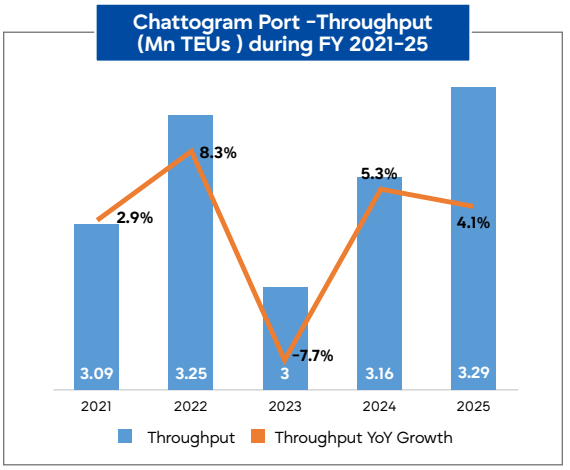
Throughput (July 2024- June 2025)	Yard Area (Hectares)	Terminal Area (Hect-ares)	Total Ground Slots (TGS)	Reefer Plugs (Number)	Total Quay Cranes (Number)	Rubber Tyred Gantry Cranes (RTGC) (Number)	Rail Mounted Gantry Cranes (RMGC) (Number)	Reach Stackers (Number)	Fork Lifts (Number)	Crane Productivi-ty(Moves Per hour)
32,96,067	40+15+29+ 5.7+6.1+11.9	NA	NA	900	23	52	1	28	4	NA
3,022	5.5	NA	3500	48	2 MHC	NA	NA	NA	10	18-25
21,456	3.6	NA	NA	160	15 MHC	NA	NA	6	55	15
72,998	13.7	NA	NA	NA	NA	NA	NA	3	10	15-20
1,49,292	1.95	5.6	500	125	11 MHC**	2	NA	8	20	NA
NA	1.2	3.5	459	20	NA	NA	NA	2	11	NA
NA	0.5	1.5	80	3	NA	NA	NA	1	4	NA
NA	0.9	2	100	9	NA	NA	NA	1	4	NA
7,42,896	85	87	5500	360	5 + 9 MCH**	24	NA	25	35	30-35
	15	75	4239	108	4	12	NA	9	28	25-30
	12.3	12.14	3910	108	2	8	NA	NA	NA	30-35
	4.29	9.7	3372	19	3	3	2	2	3	25-30
	NA	NA	NA	NA	2	5	NA	NA	NA	25-30
	NA	20.23	13200	NA	3	4	NA	4	6	25-30
~120,000-150,000	1.7	38	656	NA	10 MHC**	NA	NA	7	4	NA
25,00,000	18	26	2,400	NA	4	12	1	NA	NA	25-28
	45.5	45.5	9,800	1,548	20	59	4	12	24	22-25
	NA	1.53	1,020	NA	3	8	NA	2	NA	20-22
20,00,000	12	20	5430	540	14	36	NA	2	2	28-30
34,00,000	10	58	NA	1150	14	46	NA	4	12	30-32
7,17,226	NA	NA	NA	NA	8	NA	18	NA	NA	22-23
7,30,000	NA	24	NA	1000	9	27	NA	16	2	25-28
	16	35	NA	NA	NA	24	NA	NA	NA	24-26
26,50,000	NA	21	3910	450	"6 "	20	NA	11	16	22-24
	NA	26.03	NA	480	11	29	NA	10	8	23-25
	NA	85	NA	1000	16	52	NA	8	NA	28-30
NA	4.8	NA	2160	400	5	2	NA	NA	12	20-22

nmar: Apr 2024-Mar 2025, Nepal - July 16 2024 - July 15 2025, Sri Lanka: Jan 2025 - Dec 2025, Pakistan - Apr 2024 - Mar 2025 23.

South Asia Country Profiles

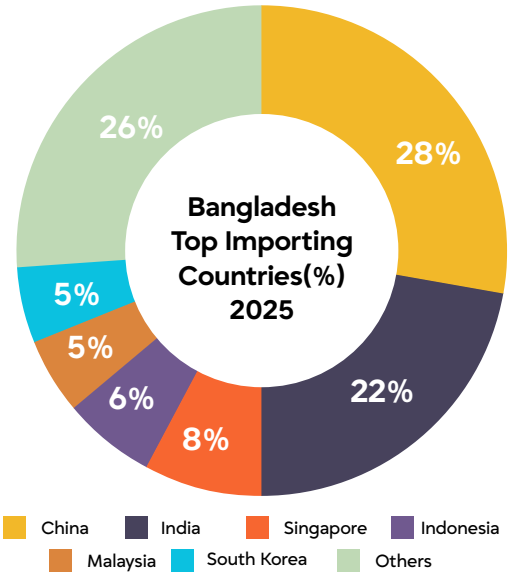
Resilience Amid Turbulence:
How Bangladesh Weathered Global and Domestic Storms

Bangladesh's container trade remains the backbone of its external commerce, channelling nearly all imports and exports through Chittagong Port. Despite global disruptions and domestic challenges, the country consistently sustains recording over and above the mark of 3 million TEUs throughput, underscoring its resilience in regional shipping networks. Chattogram Port, the country's main seaport, has set a new record in container handling, registering a 4% growth in the FY 2024–25. Nearly 99% of the country's container trade is handled by Chattogram Port, while Mongla Port handling the rest. The port handled 3.29M TEUs during the year, an increase of 0.1M TEUs from the previous year's 3.16M TEUs. From 2021 to 2025, the port faced a series of external challenges that strained its operations and trade performance. The lingering effects of COVID-19 disrupted global supply chains, causing congestion and container backlogs. The Russia–Ukraine war further destabilized shipping routes and raised freight costs. A severe dollar crisis led Bangladesh to restrict imports, while banks struggled to issue Letters of Credit, resulting in declining import volumes from mid-2022 onward. Simultaneously, global economic slowdown reduced demand for garments, impacting exports. Political unrest, transport strikes, and work stoppages by customs officials intermittently disrupted port activities. Despite these hurdles, the port maintained over 3M TEUs annually, Throughput Volatility dropped from 3.25M TEUs (FY22) to 3 M TEUs (FY23) then raised to 3.16M TEUs (FY24) and then rebounded to 3.29M TEUs (FY25).

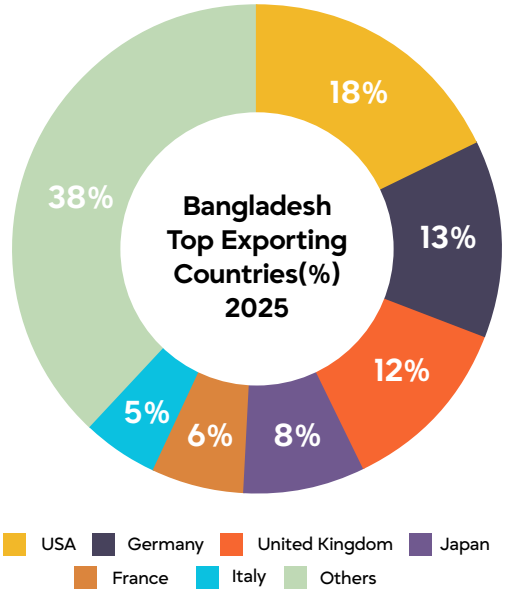


Chattogram Port: Strategic Role & Performance Overview

- Handles 92% of Bangladesh's import-export trade.
- Manages 98% of containerized cargo among all seaports.
- 25% of port cargo is containerized, remaining is bulk or liquid cargo.



*Majority of others is contributed by Japan,Thailand, United States,UAE and the rest is by all other small countries

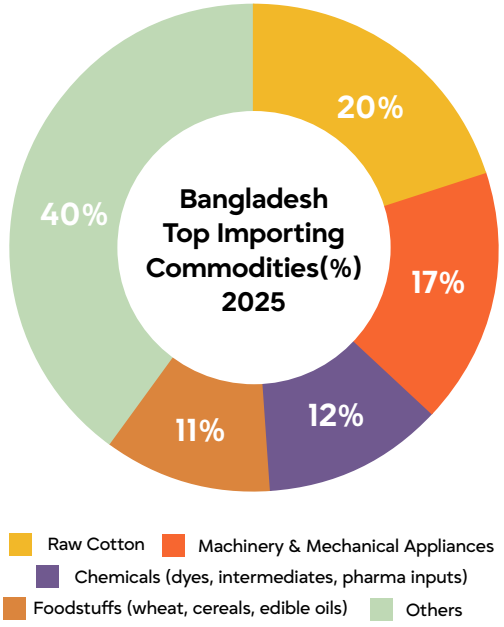


*Majority of others is contributed by Canada,Netherlands, Spain,India and the rest is by all other small countries

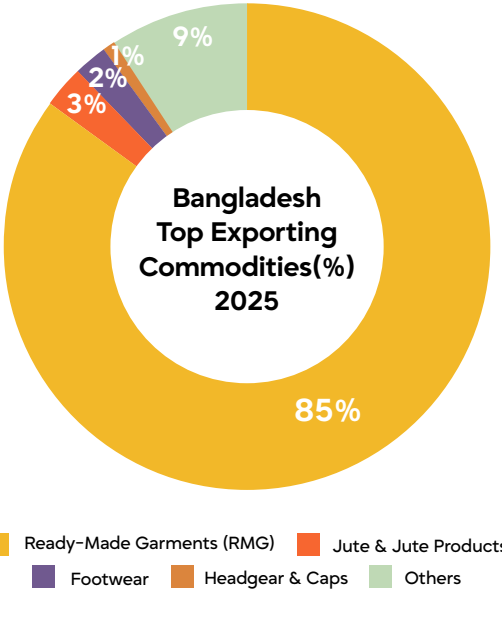
- Ready-made garments (RMG) accounted for over 80% of containerised exports, with 2.77 million TEUs shipped in 2025.
- The U.S. and EU countries together absorbed 65% of Bangladesh's containerised exports, showing continued reliance on transatlantic and European buyers. Japan and India highlight growing Asian demand, though still smaller compared to Western markets.
- Nearly one-third of Bangladesh's containerised imports came from China, reflecting dependence on machinery, fabrics, and chemicals for garment production. India provided raw cotton, yarn, agro products, and vehicles, making it Bangladesh's second-largest import partner.
- South Korea, Japan, and Thailand supplied machinery, electronics, and chemicals, diversifying sources beyond China and India. Though smaller, the U.S. remained important for cotton and specialised machinery imports.

Bangladesh's Top Exporting and Importing Commodities 2025

- RMG exports remain the backbone of Bangladesh's economy, contributing over four-fifths of total exports.
- Jute and leather continue to be symbolic exports, though their share is small compared to garments.
- Pharmaceuticals and seafood are emerging sectors, but their contribution is still marginal (<1%).
- Bangladesh's total exports in FY 2024–25 reached 48.28 B USD, an 8.6% increase YoY, with garments driving the bulk of growth.



*Others:Iron & Steel Products, Plastics &Polymers, Vehicles & Transport Equipment, Electronics & Electrical Machinery



*Others:Leather & Leather Goods,Paper, Yarn & Woven Fabrics,-Pharmaceuticals,Seafood (shrimp, fish),Frozen Foods (vegetables, poultry), Miscellaneous Textiles

- Raw cotton, chemicals, and machinery together account for nearly half of imports, underscoring Bangladesh's reliance on inputs for its RMG sector.
- Wheat and edible oils remain essential imports, reflecting Bangladesh's need to supplement domestic production.
- Imports of vehicles, electronics, and steel highlight growing consumer demand and infrastructure development.

India–Bangladesh Connectivity Boost in 2025
India and Bangladesh have cemented a new era of regional trade integration. Permanent access to Chattogram and Mongla ports, India's operational rights at Mongla, and the launch of container services between the two ports are reshaping logistics.
Bangladesh's tax authority issued a Permanent Standing Order enabling Indian transit cargo through Chattogram, cutting inland distances for the Northeast by nearly half. India is simultaneously developing economic zones at Mirsarai and Mongla, with 350+ Indian firms already active, reducing reliance on the congested Petrapole–Benapole route.

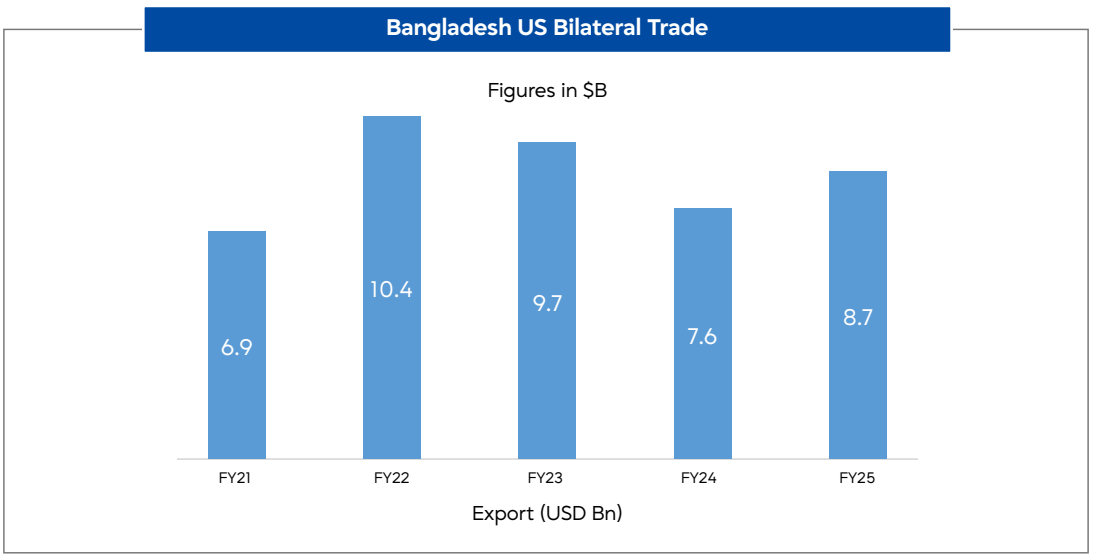
Key milestones include:
- **2023:** Bangladesh granted India permanent port access.
- **2024:** India secured Mongla terminal rights.
- **2025:** Container services began between Mongla and Chattogram.

Together, these steps lower costs, speed up cargo movement, and strengthen Indo-Bangladesh trade ties, positioning both nations as pivotal players in South Asian connectivity.

Bangladesh – USA Bilateral Trade

Strategic Importance:
- The US remains Bangladesh's top export partner, ahead of the EU, due to strong demand for ready-made garments (RMG).
- Apparel exports to the US are critical for Bangladesh's economy, supporting millions of jobs in the garment sector.
- The growth in FY2025 reflects recovery in global demand after earlier slowdowns linked to inflation and supply chain disruptions.

Bangladesh's exports to the United States reached about $8.7 billion in FY2025,
making the US its single largest export destination and accounting for 18% of total export earnings



Export Value:
- FY2025 exports to the US stood at $8.7 billion, up 14.4% from $7.6 billion in FY2024.
- Monthly data shows fluctuations: for example, in Nov 2024 exports were $576 million, down from $684 million in Oct 2024, reflecting seasonal and demand variations.

Bangladesh - India Trade
In FY2024–25, Bangladesh–India trade remained robust: India exported over $11.3 billion worth of goods to Bangladesh, while Bangladesh's exports to India reached about $1.76–1.89 billion, showing a persistent trade imbalance. In 2025, India's exports to Bangladesh continued to rise, while Bangladesh's imports from India grew faster than its exports, widening the gap.

Strategic Context
India consistently exports 6–7times more to Bangladesh than it imports. Operationalisation of Chattogram and Mongla ports for Indian transit cargo is expected to rebalance logistics costs and encourage more Bangladeshi exports.

Sectoral Dependence:
Bangladesh relies heavily on garments and jute for exports. India supplies raw materials, fuels, machinery, and vehicles, critical for Bangladesh's industrial base.

Political Context: Despite tensions after Sheikh Hasina's fall in 2024, bilateral trade surged, underscoring economic interdependence.

Bangladesh Exports to Asian Countries
Bangladesh's exports to Asian markets in 2025 showed strong growth, led by trade with China, India, Japan, and ASEAN countries, reflecting diversification beyond its traditional Western partners.

InFY2024–25, Bangladesh's merchandise exports reached $48.3 billion, with a government target of $63.5 billion for FY2025–26 (goods $55 billion, services $8.5 billion)

Export growth in Asia is supported by:
- Regional connectivity projects (ports, rail, multimodal corridors).
- Duty-free access in Japan and preferential trade arrangements with India and ASEAN.
- Rising demand for non-traditional exports like footwear, headgear, and jute goods.

Bangladesh's Infrastructure and Connectivity Shifts:
Bay Terminal Project Chattogram's Bay Terminal, formally approved in April 2025 with a Tk13,525 crore (≈USD 1.1B) investment, is slated to open by 2030. Breakwaters, navigation channels, and marine infrastructure will enable berthing of vessels up to 6,000 TEUs at 10–12m drafts, easing congestion and boosting Bangladesh's trade capacity.

Shipping Fleet Expansion Bangladesh's oceangoing fleet grew to 95+ vessels with 3.2M tonnes capacity. Tax exemptions and VAT waivers until 2030 sustain investor confidence, reducing reliance on foreign carriers and retaining more of the USD 7–8B annual freight spend.

India's Customs Policy Shift In April 2025, India withdrew third-country transshipment rights, limiting Bangladesh's access to Bhutan, Nepal, and Myanmar via Indian corridors. This raises costs and transit times, pushing Bangladesh to accelerate Bay Terminal and Payra Port projects and strengthen direct maritime links.

Rail Connectivity Projects
- **Akhaura–Agartala Link (12.24 km):** Operational since 2023, easing trade and passenger flows between Tripura and Bangladesh.
- **Khulna–Mongla Line (65 km):** Built with Indian credit, but underutilised due to poor integration; potential remains to connect Mongla Port with India, Nepal, and Bhutan.

Domestic Maritime Route A container service between Mongla and Chattogram was launched in April 2025, reducing congestion and supporting exports. Yet Chattogram still faces a yard density of 88% and berthing delays of up to six days, prompting stricter port management measures.

Pangaon Inland Container Terminal (PICT)

PICT serves as a vital riverine gateway for Bangladesh's international trade, bridging the primary seaports and the industrial heartland. On November 17, 2025, the Chittagong Port Authority (CPA) signed a 22-year concession agreement with MEDLOG Bangladesh Private Limited, the logistics arm of the Mediterranean Shipping Company (MSC). Under this public-private partnership (PPP), MEDLOG is responsible for the operation, maintenance, and modernisation of the terminal, officially resuming full-scale operations on January 17, 2026. With the takeover, PICT's profile has shifted from a limited, state-run facility to a modernised terminal. MEDLOG has committed US$4.9 billion for new equipment and automation.

The terminal is strategically located on the banks of the Buriganga River in West Keraniganj, Dhaka, three kilometres from the Dhaka–Mawa–Bhanga Expressway. It was constructed to decentralise cargo traffic from congested highways.

PICT is owned by the Chittagong Port Authority (CPA) in partnership with the Bangladesh Inland Water Transport Authority (BIWTA). MSC utilises PICT as an inland hub for its feeder vessels. The latest service patterns include a regular shuttle linking PICT and Chattogram Port. Cutoff times are coordinated synchronise with the inland barge vessels with the mother vessel's arrivals and departures at the Chattogram and Patenga terminals.

Facilities

- Two berths capable of handling two vessels simultaneously
- On-site one-stop customs clearance and bank booths
- MSC has introduced specialised inland barges equipped with their own onboard reefer points.
- Offers Through Bill of Lading facility from PICT
- Full digitisation of import/export handling to reduce "dwell time"

USP

- Waterway transport from Chattogram to Pangaon is 50% cheaper than road transport
- Direct riverine access avoids the 10–15-hour truck delays on the Dhaka-Chattogram highway
- Lower carbon footprint per TEU compared to road-based logistics
- The CFS in PICT is the only major river-linked CFS in Dhaka zone
- Integration into a global carrier's network ensures reliable "first-mile/last-mile" delivery and predictable schedules

CFS

The PICT at Pangaon is a 10,000-square-meter shed for stripping and stuffing. It is a modernised, expanded on-site CFS facility developed and operated by MEDLOG Bangladesh Private Ltd. The facility is integrated with their global Terminal Operating System (TOS), providing real-time digital updates on cargo status.
The main Container Yard (CY) covers 55,000 sq. m. This is the terminal's primary bonded area for container storage.

Bangladesh

Key Data	
Port Code	BDPGN
Operator	MEDLOG Bangladesh Private Limited
Year of Establishment	2026
Installed Capacity	3,500 TEUs at any given time.
Throughput	116,000 TEUs per year. With recent upgrades, MEDLOG aims to expand to 160,000 TEUs.
Utilisation	Utilisation was consistently below 10–20% capacity. With MSC's integrated service, utilisation is projected to rise 60% by the end of 2026 as cargo shifts from road to water.
Management	Anisul Millat (Managing Director)
Website	cpa.gov.bd
Operator's Website	medlog.com.

Equipments

- 2 units Mobile Harbour Cranes
- 2 units Rubber-Tyred Gantry (RTG) Cranes
- 2 units Straddle Carriers
- 3 to 5 barges, each with a capacity of 128–140 TEUs
- 48 reefer points

Rail/Road Connectivity

PICT does not have a direct on-dock rail siding, but serves as the waterway alternative to rail. PICT itself functions as an Inland Container Depot (ICD). It serves a network of off-docks and industrial zones in the Greater Dhaka area and essentially serves as the "Dhaka terminal" for the 19 private ICDs in Chattogram.

Bhutan's Trade and Logistics Transformation in 2025

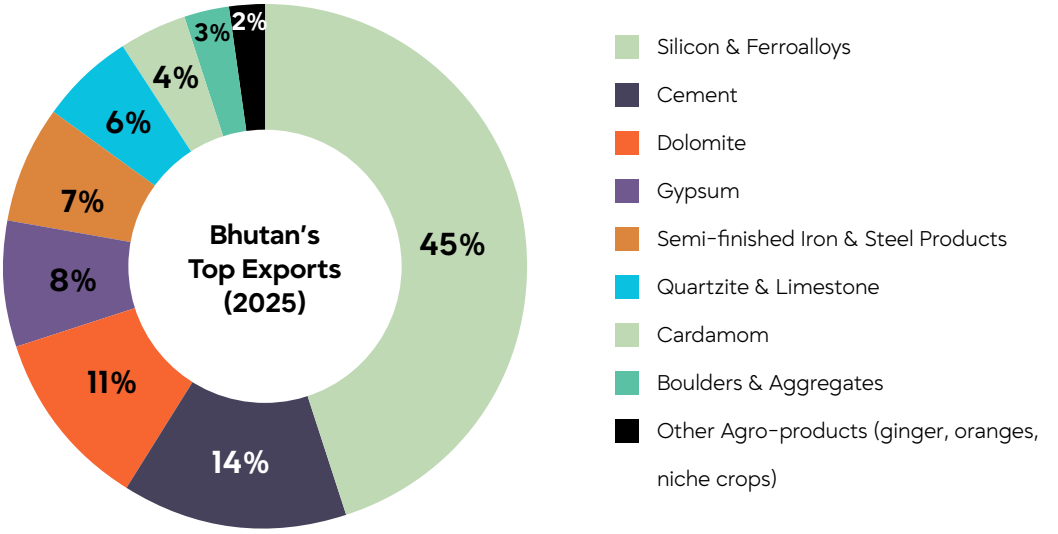
India and Bhutan's economy in 2025 continued its steady recovery, with GDP growth projected at 8.3%, supported by tourism revival and industry (mining, construction, manufacturing), though agriculture remains weak. Despite being a small, landlocked nation, Bhutan's trade sector remained highly open, with imports rising sharply while exports grew modestly, narrowing but not eliminating the trade deficit. Over the years, imports increased drastically while exports remained generally stable. Imports rose sharply in 2022, moderated in 2023–24, and remain high in 2025.

Trade Performance

The Country's merchandise exports were led by electricity, ferrosilicon, dolomite, and niche agricultural products. Imports remained high, dominated by fuel, vehicles, machinery, steel, cement, and food staples. India continued to account for nearly 80% of Bhutan's overall trade, underscoring its role as Bhutan's largest partner.

Containerized Exports

- Hydropower & Ferroalloys: Electricity exports expanded with new hydropower capacity, while ferrosilicon remained the backbone of containerised trade.
- Minerals: Dolomite, gypsum, and cement contributed steadily, shipped in bulk containers.
- Agriculture: Cardamom, citrus fruits, and ginger provided diversification, though volumes remained small.
- Regional Dependence: India and Bangladesh absorbed nearly all exports, reflecting limited market diversification.

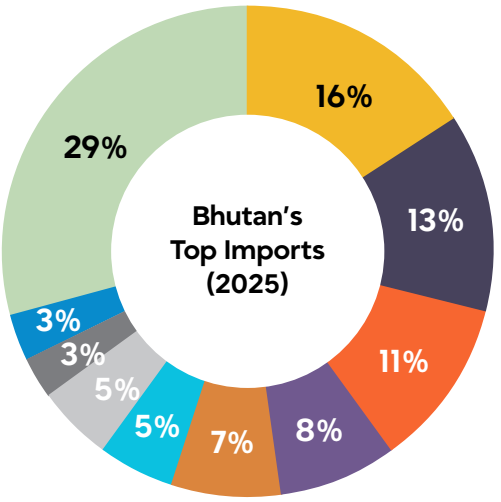


Top Export Destinations (2025)

- India – ~80%
- Bangladesh – ~15%
- Other countries – ~5%

Containerized Imports

- Industrial Inputs: Machinery, steel, and cement dominated imports, reflecting demand for infrastructure.
- Food Security: Rice, pulses, and edible oils remained essential imports.
- India's Dominance: Over four-fifths of imports came from India, with smaller shares from China, Thailand, and Malaysia.



Top Import Sources (2025)

- India – ~80%
- China – ~8%
- Thailand – ~6%
- Malaysia – ~6%

Logistics Reforms & Agreements

2025 was a landmark year for Bhutan's trade logistics:

- **India–Bhutan Cooperation:** New MoUs expanded hydropower exports, digital connectivity, and infrastructure support, strengthening Bhutan's modernisation drive.
- **Bangladesh Access:** Bhutan secured access to Mongla, Payra, and Chattogram ports, reducing reliance on Indian gateways. This agreement is expected to lower transport costs, improve connectivity for essential imports, and facilitate smoother exports of minerals and agricultural goods.
- **Customs Modernisation:** Bhutan advanced paperless trade systems, streamlined border procedures, and aligned its framework with international standards.

Dry Ports and Corridors

Bhutan's inland container facilities at Phuentsholing and Samdrup Jongkhar handled nearly 80% of containerised trade.

- **Phuentsholing:** The busiest hub, processing the majority of imports, especially fuel and machinery.
- **Samdrup Jongkhar:** Stronger export profile, particularly for agricultural goods, linked to India's Darranga ICP in Assam.

Bhutan's trade in 2025 reflects both vulnerability and opportunity. Imports remain high, but hydropower expansion, diversification into minerals and niche agriculture, and new transit agreements with Bangladesh are reshaping its trade ecosystem. With India as its anchor partner and Bangladesh offering an alternative port access, Bhutan is positioning itself for greater resilience and deeper integration into South Asia's logistics networks.

Samdrup Jongkhar Mini Dry Port (MDP)

Bhutan

MDP is a vital trade gateway for eastern Bhutan. It was developed to modernise cross-border logistics and serve as a strategic link between the Kingdom of Bhutan and the Indian state of Assam. The terminal is located in Samdrup Jongkhar Thromde, a border town in southeastern Bhutan. It sits just a few hundred meters from the Integrated Check Post (ICP) at Pelzomthang. The town has been a trading hub since the 1960s, and the formalised dry port infrastructure has further boosted trade. The terminal is primarily designed as a high-volume break-bulk and transhipment hub.

The terminal is owned by the Royal Government of Bhutan, under The Ministry of Industry, Commerce and Employment (MoICE). As a "Mini" dry port, it has a lower TEU throughput than Phuentsholing but remains critical for regional trade. It serves as the primary exit point for Exit point for Bhutan's eastern exports of minerals and agriculture.. Historically, the region has seen high utilisation for loose cargo transport (trucks), transitioning toward containerization as infrastructure matures.

The terminal operates as the central ICD for eastern Bhutan, servicing several Land Customs Stations (LCS) in the region, including those at Nganglam and Gelephu.

Primary export ports are the Syama Prasad Mookerjee Port and the Haldia Dock Complex. Under the 2023 Transit Agreement, the terminals have also been using Chattogram Port and Mongla in Bangladesh for export.

Key Data	
Port Code	BTSJR
Operator	Department of Revenue and Customs
Year of Establishment	2025
Installed Capacity	Its primary metric for "installed capacity" is based on storage tonnage. It features two large warehouses (Import and Export) with a combined capacity to handle 13,000 Metric Tonnes (MT) of cargo at any given time.
Throughput	3,500 to 5,000 TEUs per annum
Utilisation	TEU count is lower than the Phuentsholing ICD
Executive Leadership	Karma Namgyel
Website	https://sjthromde.gov.bt/

Equipments

- Weighbridges for heavy vehicle monitoring.
- Forklifts for cargo handling and transhipment.
- CCTV Surveillance for 24/7 security

Facilities

- The dry port spans approximately 7 acres of land
- Its warehouses have a carrying capacity of 6,500 metric tonnes each for exports and imports
- Export and Import Warehouses: Total capacity of 13,000 MT
- Dedicated 200 MT facility for perishable goods such as citrus fruits
- On-site administrative support for eCMS (electronic Customs Management System)

USP

- It is the only major entry point for six eastern districts (Tashigang, Lhuentse, etc.)
- Its location allows traders to tap into Guwahati's international airport and rail facilities
- One of the few Bhutanese hubs with viable future links to Indian inland waterways (NW2)
- Provides an essential alternative to the heavily congested Phuentsholing border

Rail/Road Connectivity

Goods move predominantly by road through the Darranga border post (India). Containers are transported via the Indian highway network to and from major hubs in Assam and onward to the ports of Kolkata or Haldia.The terminal connects to the Samdrup Jongkhar–Trashigang National Highway.

On the Indian side, it connects to NH 127D via Darranga, linking to Guwahati. There is no rail link within Bhutan, but the Rangiya–Samdrup Jongkhar rail link has been proposed as a strategic regional project. The terminal is strategically positioned to utilise National Waterway 2 (Brahmaputra). Cargo can be moved by road to Pandu Port in Guwahati or to the Jogighopa Multimodal Terminal (approx. 150 km away), for riverine transit to Bangladesh and Indian seaports.

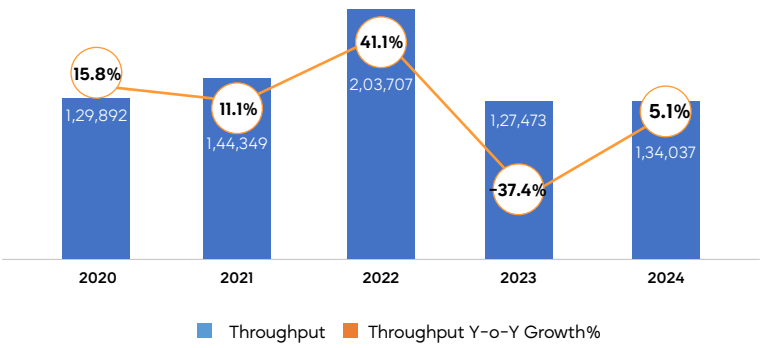
Import-Driven Growth Positions Maldives in South Asia's Regional Logistics Network

The Maldives' containerised trade in FY 2025 underscored the nation's dependence on maritime logistics, with imports far outweighing exports. Maldives Ports Limited (MPL), operating the main gateway at Male, processed nearly 6,000 TEUs in June 2025 alone, reflecting steady growth in inbound cargo volumes. Imports comprised food staples, fuel, and construction materials, while exports remained limited to fisheries—primarily tuna bound for Europe and Asia.

MPL saw increasing container traffic in 2025, with Q1(Jan -March 2025) handling 34,969 TEUs, which is 2.6% Quarter-On-Quarter growth and specific months showing strong figures like 6,320 TEUs in July and 6,663 TEUs in August, driven by essential goods and improved operations. MPL's Initiatives continued focus on expanding capacity and efficiency, faster clearance, and streamlining operations, including new facilities, such as logistics hubs supports growth in Hulhumale, improved handling for high-demand periods. Key developments also include MPL increasing storage to 5,100 TEUs in 2024-25. The Maldives relies heavily on imports, and increasing infrastructure development is driving container traffic, supported by direct links with major ports. High demand for perishable items like eggs, onions, and potatoes significantly contributes to container volume.
In 2024-2025, MPL focused on digital transformation and transitioned to the "Tradian" system in April 2025 for seamless digital trade services, integrating trade processes by June 2025.

Coming to Infrastructural enhancement, North Harbour, initiated phased development in Male to reduce congestion and boost efficiency for commercial and public use.
India's Dominance: Over four-fifths of imports came from India, with smaller shares from China, Thailand, and Malaysia.

Male Commercial Harbour Throughput TEUs during 2020-2024



Maldives'Top Exporting Countries 2025

Maldives' total Exports in 2024 were valued at 92.42 Mn USD. Maldives' main export partners were Thailand, the United Kingdom and Germany.

The top three export commodities were Fish, crustaceans, molluscs, aquatic invertebrates; Meat, fish and seafood preparations and Residues, wastes of the food industry, animal fodder. Total Imports were valued at 3.63 Bn USD. In 2024, the Maldives had a trade deficit of 3.54 Bn USD.

SNo	Name of the Country	Share of Exports (%)
1	Thailand	35
2	United Kingdom	22
3	Germany	10
4	India	5
5	France	4
6	Vietnam	4
7	Bangladesh	3
8	Switzerland	2
9	Japan	2
10	Sri Lanka	2
11	Others	11

Maldives's Top Importing Countries 2025
Maldives' total Imports in 2024 were valued at 3.63 Bn USD. Maldives main import partners were China, the United Arab Emirates and India.

The top three import commodities were Mineral fuels, oils, distillation products, machinery, nuclear reactors, boilers and Electrical, electronic equipment. Total Exports were valued at 92.42 Mn USD. In 2024, the Maldives had a trade deficit of 3.54 Bn USD.

SNo	Name of the Country	Share of Exports (%)
1	China	19
2	United Arab Emirates	15
3	India	14
4	Oman	8
5	Malaysia	6
6	United States	4
7	Sri Lanka	4
8	Singapore	4
9	Thailand	3
10	France	2
11	Others	21

Maldives Ports Limited (MPL) has officially commenced operations at the Empty Container Depot in Thilafushi, marking another major step in expanding port infrastructure and capacity. The new facility has a total storage capacity of 2,400 TEUs, designed to streamline container management and logistics efficiency. This strategic development will alleviate space constraints at both Male Commercial Harbour and Hulhumale International Terminal, ensuring smoother cargo handling and improved turnaround times across MPL's operations.

The depot features a 60-meter quay wall, with land levelling works completed by Maldives Transport. Following this, dedicated MPL teams worked extensively to prepare and operationalise the site, bringing the facility up to full operational standards. This achievement reinforces MPL's commitment to enhancing the national port infrastructure and optimising services to support the growing demands of the Maldives' maritime and trade sectors.

Male Commercial Harbour (MCH)

MCH remains the primary gateway for the Maldives, serving as the central hub for nearly all the nation's international maritime trade. Despite the ongoing transition toward the new mega-port at Gulhifalhu/Thilafushi, MCH has recently undergone significant operational reforms to maintain its status as a vital economic artery.
It is located in the north-west corner of Male Island, the capital of the Maldives.

The terminal is wholly owned and operated by Maldives Ports Limited (MPL), a 100% state-owned enterprise. While MPL is the sole authority, it maintains a close logistics partnership with Maldives State Shipping (MSS). This national shipping line acts as a primary carrier for the port's feeder services.

MCH is primarily a destination for regional feeder vessels. Since January 26, 2026, the port has allowed 24-hour vessel entry, ending a 30-year restriction on nighttime arrivals. This has synchronised MCH with global shipping schedules.

Due to the extreme space constraints of Male Island, the port utilises "off-dock" storage at the Hulhumale International Terminal to manage overflow. The key shipping lines operating are: MSC (Mediterranean Shipping Company), Maersk, CMA CGM, and MSS (Maldives State Shipping).

Facilities

- 101.3m Main Quay (9m draft); Eastern and Western Lighterage Berths (3.5m draft)
- 21,700 m^2 open storage and 2,900 m^2 covered warehouse
- 80 plug points for temperature-controlled containers

USP

- As of January 2026, it is the first time in Maldivian history that the port limit operates 24/7, drastically reducing "anchorage waiting costs" for shipping lines
- Located in the heart of the capital, it provides direct, immediate access to the nation's largest consumer market
- Despite being a small harbour, it maintains a dedicated "priority lane" for perishable food and medical supplies, which account for over 60% of Maldivian imports
- The "My Bandharu" portal allows for 100% digital clearing and gate-pass generation, a major leap for a historically manual port

Maldives

Key Data	
Port Code	MVMLE
Operator	Maldives Ports Limited (MPL)
Year of Establishment	1986
Installed Capacity	150,000 to 200,000 TEUs per annum
Throughput FY25	120,000 TEUs
Utilisation	90%
CEO	DCP (Retd.) Mohamed Rishwan
Website	www.port.mv

Equipments

- Mobile Harbour Cranes (MHC) and Ship's Gear are used for loading/unloading due to the lack of rail-mounted gantries
- Reach Stackers (45t capacity), Empty Handlers and Forklifts (ranging from 3t to 25t) for yard fleet
- 3 Tugs (including Veeru and Ox), 6 Hatch/Flat-top Barges, and a 400hp Pilot Boat

ICDs & CFSs

Since the Maldives is an archipelagic nation composed of over 1,000 coral islands, the geography makes a traditional railway system physically and economically unfeasible. Instead, the "logistics backbone" of the Maldives is entirely maritime and road-based. MCH relies on a Barge-and-Bridge model to move containers. Inter-Island Barging is the Maldivian equivalent of a "freight train." Large flat-top and hatch barges (200t to 600t capacity) ferry ICDs & CFSs containers from the MCH to industrial islands like Thilafushi or the Hulhumale International Terminal. In early 2026, the Maldivian government and Maldives Ports Limited (MPL) doubled down on road efficiency by providing 24/7 access for truckers to move their cargo at night to avoid city congestion.MCH services two primary off-dock facilities: the Hulhumale International Terminal (its main CFS/ICD) and the Thilafushi Industrial Hub.60% of the cargo movement is by Barges/Feeders and 40% by road.

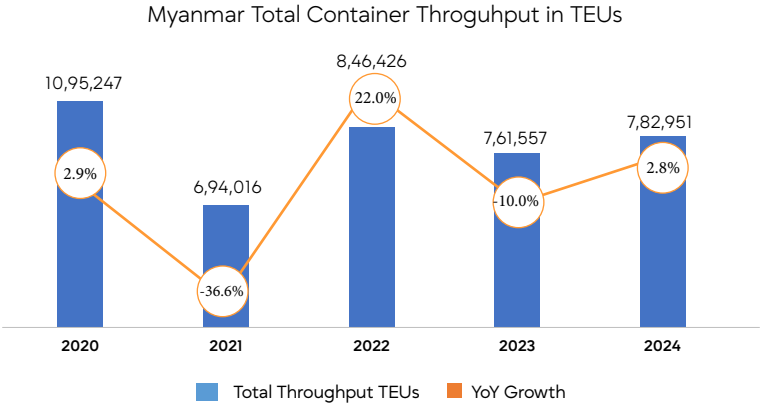
Myanmar's Trade Momentum Falters in 2025 After Modest Recovery in 2024

In 2024, Myanmar's trade rebounded modestly, with exports and imports rising compared to 2023, supported by stronger border trade and container cargo recovery at Yangon Port. However, in 2025 (first half), growth has slowed again, reflecting persistent structural challenges despite regional connectivity initiatives.
The container throughput in FY 2023 is 761,557 TEUs, then rose to 782,951 TEUs in 2024. In 2025, early data indicate stabilisation rather than strong growth. Myanmar's trade remains structurally fragile, but connectivity projects (Kaladan, Sittwe) and ASEAN integration could provide medium-term resilience.

Yangon Port:

- Handled 633 container vessels across the year and 782,951 TEUs throughput in 2024
- Monthly arrivals ranged from 49 to 60 vessels, showing steady traffic.
- Larger vessels (up to ~2,700 TEU capacity) began calling after draft extension works on the Yangon River.

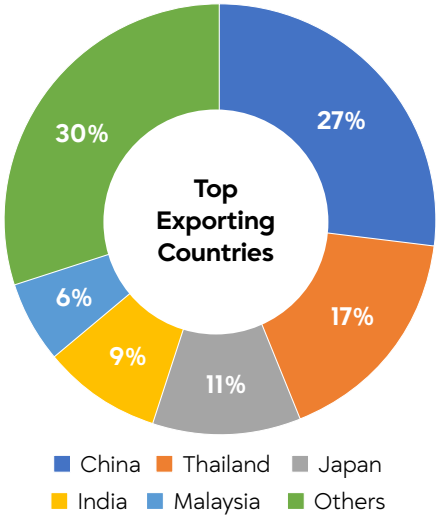
Trade Statistics for the last 5 years--Container Cargo (TEUs)

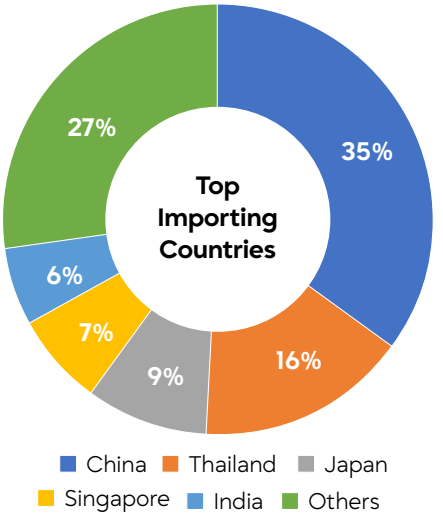


Export and Import Data 2024 and 2025

Myanmar's total Exports in 2024 were valued at US$14.92 billion. Myanmar's main export and import partners were: China, Thailand and India. Total Imports were valued at US$12.45 billion. In 2024, Myanmar had a trade surplus of US$2.47 billion. The container throughput for the first half of 2025 is 4,79,691 TEUs, including imports of 245,514 TEUs and exports of 234,177 TEUs.

Top Exporting and Importing Countries of Myanmar in 2025 are as follows:





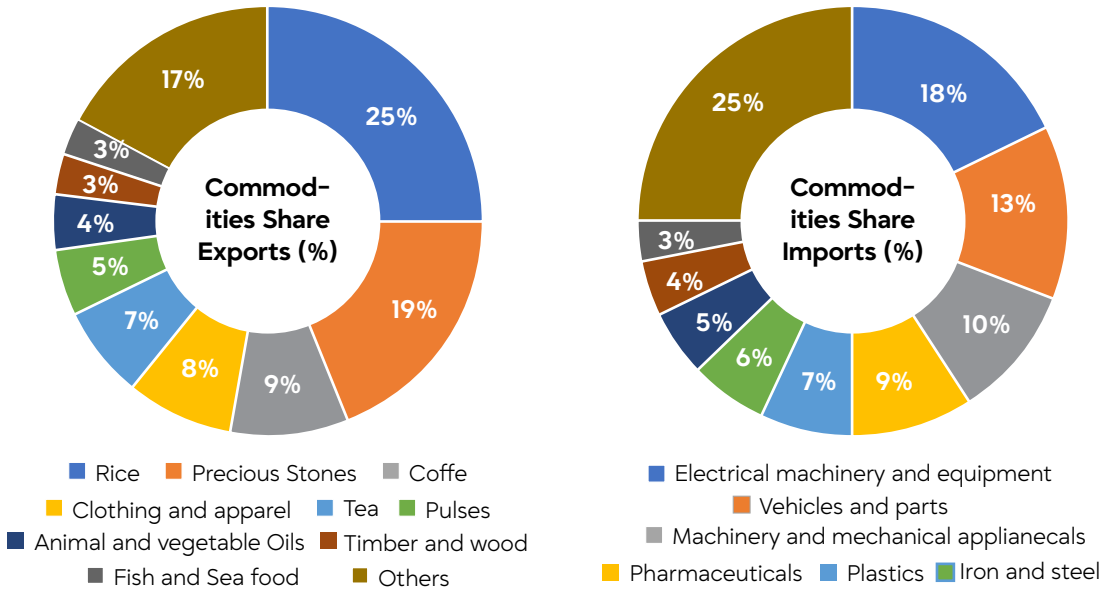
Key exports to these countries include

- Agricultural products (rice, beans), mineral resources (precious stones, jade), garments, and marine products. Myanmar benefits from regional trade agreements such as the ASEAN Free Trade Area (AFTA) and bilateral agreements, particularly with China and Thailand, which help ease trade flows.

Key imports from these countries include

- Machinery, electrical equipment, petroleum products, vehicles, and chemicals. Trade agreements such as the ASEAN Free Trade Area (AFTA) and Myanmar's participation in the Asia-Pacific Trade Agreement (APTA) facilitate smoother trade flows.

The nation's top Export and Import products for 2025 were prominently characterised as follows:



Advancing Regional Trade: India–Myanmar Port Connectivity Agreements and the Kaladan Corridor
In a strategic move to bolster its maritime presence and enhance regional connectivity, India has gained operational control over the Sittwe Port in Myanmar. The agreement allows India Ports Global (IPGL) to manage the entire port on the Kaladan River, marking India's second overseas port acquisition after Chabahar in Iran.

Sittwe Port Development and Significance for India:
Kaladan Multimodal Transit Transport Project: The port development is integral to the Kaladan project, aimed at enhancing connectivity between Sittwe in Myanmar and Mizoram in India, facilitated by waterways and road networks. A strategic initiative to enhance connectivity between India's Northeast and Myanmar is set to be fully operational by 2027. The project integrates sea, river, and road transport to connect Kolkata/Visakhapatnam → Sittwe Port → Kaladan River → Paletwa → Mizoram (India). The corridor will reduce the Aizawl–Kolkata distance by approximately 700 km, lowering logistics costs and transit times.

The India–Myanmar port connectivity agreements, particularly the operationalisation of Sittwe Port and the phased completion of the Kaladan Multimodal Project, represent a transformative step in regional trade facilitation. These initiatives will not only reduce transit costs and distances but also strengthen India's strategic presence in the Bay of Bengal while deepening economic integration with Myanmar and ASEAN.

Myanmar Industrial Port (MIP)

MIP, located in the heart of Yangon, remains a pivotal engine of Myanmar's maritime trade. Known as a "National Port," it is one of the busiest terminals in the Yangon inner harbour, handling approximately 30–40% of the country's containerised cargo. MIP is a 100% privately owned national project.

It is strategically located on the Yangon River in Ahlone Township, Yangon, with direct access to the city's commercial centre. It is the primary clearing point for the Hlaing Tharyar industrial zone, linked via Strand Road and directly connected to the national railway service for project cargo. Unlike many ports that involve foreign joint ventures, Annawa Swan-er-shin Group (MAS) built and funded the port 100%. However, it has historically worked with the International Finance Corporation (IFC) for modernisation loans.

MIP acts as a hub for river-to-sea connectivity. Small coastal vessels and barges frequently call at MIP to move cargo to other domestic ports such as Sittwe or Kawthaung, utilising the Ayeyarwady River network for "inland waterway" distribution.

MIP is a preferred call for regional feeders and intra-Asia liners due to its draft (up to 10 metres along the wharves).
Dominant service links include Singapore–Yangon and Port Klang–Yangon loops.

Active calls from SITC, CMA CGM, Samudera, Maersk (Sealand), Cosco, and Evergreen. SITC and Samudera are particularly prominent, utilising the terminal's capacity for high-frequency weekly rotations.

Facilities

- Phase 1 offers 760m (4 berths); Phase 2 adds 1000m (up to 5 berths)
- 1,000 reefer plug points, the highest in the Yangon cluster, support seafood and agricultural exports
- On-site computerised customs X-ray stations
- Owns a dedicated fleet (Dragger & Hopper Barges) to maintain a 13m depth along the wharves, enabling it to handle larger vessels (up to 2,700 TEUs) that were previously restricted to the Thilawa outer port

USP

- MIP operates its own ICD and CFS within its immediate perimeter, creating a seamless road-to-gate connection.
- Closest major terminal to Yangon's city centre, significantly reducing trucking time and costs.
- Proprietary dredging equipment enables the terminal to handle larger vessels than most other Yangon Inner Harbour ports
- With 1,000 plug points, it is the specialised gateway for Myanmar's temperature-controlled export market

Myanmar

Key Data	
Port Code	MMRGN
Operator	Myanmar Annawa Swan-er-shin Group (MAS) Co., Ltd
Year of Establishment	2003
Installed Capacity	800,000 to 1,000,000 TEUs per annum
Throughput FY 25	450,000–500,000 TEUs
Utilisation	50%–60%
CEO	Captain U Ko Ko Htoo
Website	www.mip.com.mm

Equipments

- 22 Rubber-Tyred Gantry Cranes (48-ton capacity)
- 25 Reach Stackers (45-ton, 5-tier stacking)
- 32 Empty Handlers (5–8-tier stacking)
- 30 backup generator sets to ensure 24/7 refrigeration
- Includes high-capacity Grab Dredgers (12 cubic metres), two Hopper Barges (1,500 cubic metres capacity), and two powerful Tug Boats (2,600 HP) to guide ships through strong river currents

Rail/Road Connectivity

It is linked to the national rail grid via the Ywathargyi Dry Port. Ywathargyi serves as the primary rail hub. From there, cargo is loaded onto Myanma Railways block trains for transport to the Mandalay Dry Port. The terminal includes its own ICD for container storage and maintenance, with a capacity of 10,000 TEUs.The CFS offers both bonded and non-bonded warehousing, allowing importers to store goods under customs supervision.

Nepal Trade 2024–25: Rising Exports Amid Persistent Deficit

Nepal's imports remained dominant, exports surged in 2024–25, containerised throughput grew modestly. Nepal's exports reached an all-time high of 1.92 billion USD in the fiscal year 2024/25. The record surge was largely attributed to a sharp increase in refined edible oil exports, particularly soybean and sunflower oil, to India. Imports also rose in FY 2024-25, with Nepal bringing in goods worth 12.52 billion USD. With both exports and imports increasing, Nepal's total foreign trade reached Rs 2.081 trillion.

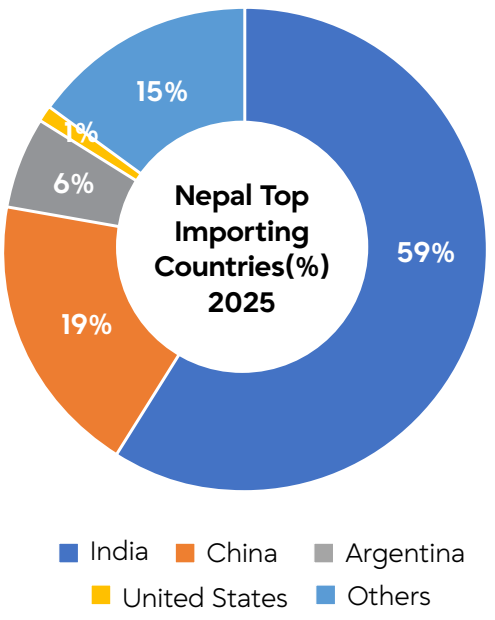
India remains Nepal's dominant trading partner, accounting for nine of Nepal's top 10 export items. Imports and exports increased 13.3 per cent and 81.8 percent respectively. Exports and Imports were increased with India, China, and other countries. Total trade deficit increased 6.0 per cent to USD 10.6 billion in FY 2024-25.

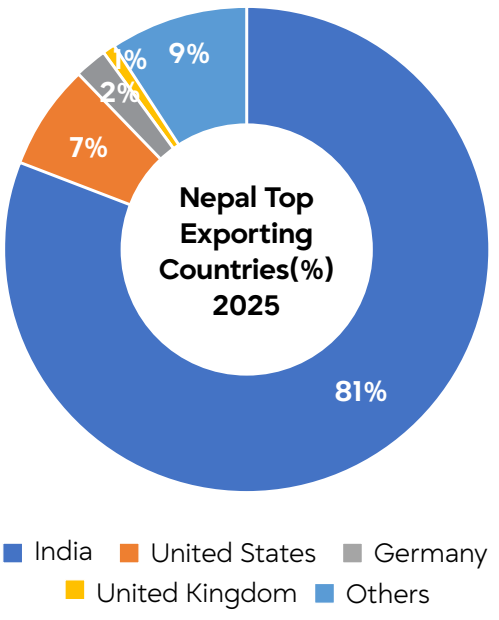
Exports from Bhairahawa, Biratnagar, Birgunj, Dry Port, Kailali, Mechi, Nepalgunj, Rasuwa and Tribhuwan Airport Custom offices increased, whereas exports from all other major customs points decreased in the review year. On the import side, imports from Jaleshwor and Tribhuwan Airport Custom offices decreased whereas imports from all other major customs points increased in the review year.

Annual Trade of Nepal in FY 2025

Foreign Trade Indicators	2024-2025 In Bn USD	%share with total
Import of Goods	12.5	87%
Export of Goods	1.9	13%

Nepal's Top Importing Countries and Top Exporting Countries-2025





Top Importing Commodities of Nepal in FY2024-25

Commodity Name	% Share in Total Imports
Mineral oils, mineral waxes	18%
Animal or vegetable waxes	9%
Iron and steel	8%
Machinery and mechanical appliances	7%
Machinery and equipment	7%
Vehicles	6%
Others	45%

Top Exporting Commodities of Nepal in FY2024-25

Commodity Name	% Share in Total Imports
Animal or vegetable waxes	44.2%
Man-made staple fibres	5.1%
Iron and steel	5.1%
Coffee, tea, mate and spices	4.8%
Carpets and other textile floor coverings	4.4%
Wood and articles of wood	3.4%
Others	33%

Trade Value at major Land ports in Nepal 2024-25(Bn USD)

Name of the Port	Imports Bn USD	Exports Bn Usd
Birgunj	4.3	0.71
Bhairahawa	1.8	0.15
Dryport	1.5	0.04
Biratnagar	1.4	0.52
Nepalgunj	0.5	0.02

India–Nepal Trade Dynamics Strengthened by Transit Treaty and Infrastructure Upgrades

India and Nepal have taken significant steps in FY 2025 to deepen their economic partnership and enhance regional connectivity. A fresh amendment to the Treaty of Transit has expanded rail-based freight movement between the two countries, particularly along the Jogbani–Biratnagar corridor. This update now covers both containerised and bulk cargo, reducing reliance on road transport and cutting costs for traders. Liberalised transit facilities across key routes—Kolkata–Jogbani, Kolkata–Nautanwa (Sunauli), and Visakhapatnam–Nautanwa—further integrate Nepal's trade flows with Indian ports, offering landlocked Nepal improved access to global markets. For small and medium enterprises, faster cargo movement and fewer border bottlenecks promise better planning, lower costs, and wider market reach.

Dodhara Chandani dry port:
Complementing this policy shift, Nepal has launched construction of the Dodhara Chandani dry port in Kanchanpur district. Covering 42 hectares, the facility will include warehouses, customs inspection units, quarantine facilities, container yards, and modern trade infrastructure. Linked by a six-lane access road and a four-lane bridge over the Mahakali River, the port will connect directly to India's Rudrapur industrial hub, just two hours away. This project is expected to reduce transport costs, unlock export potential in herbal products and other sectors, and create new jobs. Once operational, the dry port will serve as a gateway for both imports and exports, including trade with third countries, marking a milestone in the economic development of Nepal's Far West.

Rupaidiha Land Port:
On the Indian side, the Rupaidiha Land Port in Bahraich, Uttar Pradesh, has emerged as a key Indo–Nepal trade gateway. Spread over 115 acres, it currently handles trade worth nearly ₹8,500 crore annually and is being expanded with warehouses, cold storage, and mechanised cargo handling facilities. Direct access to NH 28C and proximity to Nepalgunj Road Railway Station enhance multimodal connectivity. Daily truck movements are expected to rise from 200 to at least 300, significantly boosting bilateral trade, particularly for western Nepal's hinterland.

Infrastructure enhancements within Nepal also play a critical role. The 80.33 km Abukhaireni–Pokhara section of the Prithvi Highway has achieved 67% progress, with major advances on the Abukhaireni–Jamune stretch. The expansion of the Muglin–Pokhara road into a four-lane highway is transformative, reducing travel time and improving access to critical regions. As part of the South Asia Subregional Economic Cooperation (SASEC) corridors, this road links Kathmandu to Dhaka and Kolkata, strengthening Nepal's integration into regional trade networks. Traffic forecasts suggest volumes will nearly double by 2040, underscoring the importance of enhanced design standards, safety features, and intelligent traffic systems.

Together, these initiatives—policy reforms, dry port development, land port expansion, and highway upgrades—signal a comprehensive effort to modernise trade logistics between India and Nepal. They not only reduce costs and improve efficiency but also position Nepal to leverage its strategic location for greater regional and global economic integration.

Key Indo–Nepal Trade Corridors
- Jogbani–Biratnagar Rail Corridor: Newly amended Treaty of Transit allows smoother movement of both containerised and bulk cargo, reducing reliance on road transport.
- Rupaidiha Land Port (Bahraich, UP): India's first land port in Uttar Pradesh, handling trade worth ₹8,500 crore annually. Expansion with warehouses and cold storage will boost connectivity to western Nepal.
- Muglin–Pokhara Highway (Prithvi Corridor): Undergoing four lane expansion, linking Kathmandu to Dhaka and Kolkata via SASEC routes. Expected to double traffic volumes by 2040, enhancing regional integration.

Together, these corridors strengthen India–Nepal trade flows, cut costs, and improve access to global markets through Indian ports like Kolkata and Visakhapatnam.

Birgunj Inland Clearance Depot (BICD)

Nepal

BICD, also known as the Sirsiya Dry Port, stands as Nepal's most critical "land-link" to global trade. It is the country's only rail-linked terminal, handling over 50% of Nepal's containerised traffic. As the country's first and most developed rail-linked terminal, it serves as the primary conduit for cargo moving between Nepal and the Indian seaports of Kolkata, Haldia, and Visakhapatnam.

The ICD is located at Sirsiya, Birgunj, Parsa District, Nepal, bordering Raxaul, Bihar, India.

Global giants, including Maersk, MSC, Hapag-Lloyd, and CMA CGM, offer through-bill-of-lading services, allowing containers to be cleared directly in Birgunj. Pristine Valley Dryport Pvt. Ltd. is the sole commercial operator and manager of the Birgunj Inland Clearance Depot (ICD). While the facility is owned by the Government of Nepal, through the Nepal Intermodal Transport Development Board (NITDB), Pristine Valley operates it. It is a Joint Venture (JV) created to bridge Indian logistics expertise with a local presence in Nepal. Pristine Logistics & Infraprojects (India) holds a majority stake (approximately 89%). The remaining 11% is held by the local Nepalese partner, the Valley Group. The Valley Group (Nepal) provides local regulatory and business integration in Nepal.

Key Data	
Port Code	NPBIR
Operator	Pristine Valley Dryport Pvt. Ltd.
Year of Establishment	2004
Installed Capacity	60,000 TEUs annually
Throughput FY 25	45,000 TEUs
Utilisation	75% to 80%
CEO	Rajesh Jha, CEO of Pristine Valley Dryport Pvt. Ltd.
Website	nitdb.gov.np and pristinelogistics.com/nepal

Facilities

- Over 420,000 sq. ft. of covered storage, including three large warehouses for LCL cargo
- Fully integrated with ASYCUDA World and the Electronic Cargo Tracking System (ECTS)
- An on-site Customs Lab testing facility to expedite the clearance of chemical and pharmaceutical imports

USP

- It remains Nepal's only functional rail-linked container terminal, offering a significant cost advantage over road transport
- Its ability to handle long-haul rakes from Visakhapatnam allows Nepal to avoid congestion at older Indian river ports
- Strategic agreements with shipping lines provide 14 days' free time for empty container returns to Indian ports. These free days are the highest in the region

Equipments

- High-capacity Reach Stackers (45-ton) for stacking containers up to 5-high
- Six Rail-Mounted Sidings for simultaneous rake operations
- Specialised forklifts (3t to 25t) and prime movers for internal drayage
- Dual electronic weighbridges for accurate cargo measurement

Rail/Road Connectivity

Pristine Valley is responsible for the entire "life-cycle" of a container once it enters the terminal. This includes managing the arrival and departure of cargo trains (rakes) from Indian ports such as Visakhapatnam and Kolkata; directly managing labour for loading and unloading; managing the yard and warehouse, which cover 94 acres of land, including 420,000 sq. ft. of warehouse space; implementing digital tracking systems (such as ECTS) and maintaining terminal equipment.

The Birgunj Integrated Check Post (ICP), located 3 km away, handles the majority of road-based truck traffic, while the ICD handles rail cargo. Birgunj acts as the "Transit Hub" for the Chobhar dry port in Kathmandu, where containers are often sent after initial rail arrival. Bhairahawa and Biratnagar are regional dry ports that coordinate with Birgunj for national logistics planning.

Bhairahawa Dry Port and Biratnagar Dry Port are the second- and third-most important trade gateways in Nepal. Both terminals have undergone significant shifts in 2025–2026, transitioning from road-only hubs to rail-integrated terminals as part of Nepal's effort to diversify its trade routes beyond the Birgunj corridor.

Pakistan's Container Trade Reaches New Heights in 2025, Driving Regional Connectivity"

Record throughput, rising exports, and modernised terminals position Pakistan's ports as a pivotal hub in South Asia's evolving trade and logistics landscape.

Pakistan's maritime sector marked a breakthrough in 2025, posting a record USD 360 million profit after sweeping reforms aimed at modernising ports, shipping, and fisheries. The year was described as transformative, with more than two dozen initiatives spanning legislation, digitisation, infrastructure upgrades, and workforce restructuring. Central to this progress was the National Maritime Policy, which unified shipping, ports, fisheries, and maritime security under a single framework, alongside a new National Shipping Policy aimed at expanding the Pakistan-flagged fleet and reducing reliance on foreign carriers.

Port and Terminal Performance
Karachi Port led the charge, achieving record throughput of 2.65 million TEUs at its terminals, including Karachi International Container Terminal (KICT). Vessel dwell times were reduced by 24–36 hours, cutting average turnaround to five days through closer coordination among port authorities, customs, and logistics agencies. Terminals such as Qasim International Container Terminal (QICT), Pakistan International Container Terminal (PICT), South Asia Pakistan Terminal (SAPT), and Gwadar Container Terminal also benefited from reforms, with enhanced crane productivity and streamlined operations. Cost-cutting measures, including the abolition of redundant posts and reduced overtime, saved billions of rupees, while investments in automation and AI monitoring strengthened efficiency.

Innovation and Governance
The Pakistan Maritime Century Framework (2047–2147) was introduced to guide long-term development. Key innovations included the establishment of an AI Maritime Secretariat, 100% e office rollout for paperless governance, integration of the Pakistan Single Window with the Port Community System, and electronic public asset disposal systems to improve transparency. These steps aligned Pakistan's regulatory framework with international conventions, reinforcing credibility in global shipping.

Export Dynamics
Exports showed a recovery in FY 2025 (July–April), rising 6.4% to USD 26.9 billion, up from USD 25.3 billion in 2024. The textile sector remained dominant, contributing 55% of total exports, with knitwear, bedwear, and garments driving growth. Textile exports rose 8.4% to USD 14.8 billion, while food exports, accounting for 23% of the total, reached USD 6.2 billion but dipped slightly by 1%. Non-traditional exports such as IT services, pharmaceuticals, and engineering goods gained momentum, reflecting diversification efforts supported by duty drawback schemes, energy subsidies, and improved market access.

Import Trends
Imports rose 7.6% to USD 48.3 billion, reflecting a revival in domestic demand and industrial expansion. Machinery imports surged 14.4% to USD 7.7 billion, reinforcing industrial modernisation, while textile imports jumped 63.5% to USD 3.5 billion due to cotton shortages and export demand. Food imports grew marginally to USD 6.9 billion. Petroleum and capital goods remained the largest import categories, leaving Pakistan vulnerable to global oil price fluctuations, though policy measures are being implemented to stabilise costs and mitigate external shocks.

Trade Partners
The United States remained Pakistan's largest export market, accounting for 18% of total exports, while China's share declined to 8%. Exports to Germany, the UK, and the UAE showed steady performance. On the import side, China, Saudi Arabia, the UAE, and Indonesia collectively accounted for nearly half of Pakistan's imports, with China's share rising to 33%. This widened Pakistan's trade deficit with China, underscoring the need for diversification and stronger industrial growth.

Pakistan's container trade in 2025 reflects a sector in transition—record port throughput, rising exports, and expanding imports driven by industrial recovery. With reforms in governance, digitisation, and infrastructure, Pakistan is positioning itself as a regional logistics hub. Sustained implementation of these measures will be critical to leveraging its strategic location and long coastline for durable growth in the blue economy.

Pakistan Container Trade Overview – FY 2025

Category	Key Highlights
Ports & Terminals	Karachi Port handled **2.65 million TEUs;** QICT, PICT, KICT, SAPT, and Gwadar supported growth. Vessel dwell time reduced by 24–36 hours; average turn-around ~5 days.
Sector Profit	The Maritime sector posted a record **USD 360 million profit,** driven by re-forms, cost-cutting, and efficiency gains.
Exports	Total exports: **USD 26.9 billion** (+6.4% YoY). Textiles contributed 55% (USD 14.8 billion, +8.4%). Food exports: USD 6.2 billion (–1%). Non-traditional exports (IT, pharma, engineering) showed strong growth.
Imports	Total imports: **USD 48.3 billion** (+7.6% YoY). Machinery imports: USD 7.7 billion (+14.4%). Textile imports: USD 3.5 billion (+63.5%). Food imports: USD 6.9 billion (+0.6%). Petroleum and capital goods remained dominant.
Top Export Partners	US (18%), China (8%), Germany, the UK, and the UAE.
Top Import Partners	China (33%), Saudi Arabia, UAE, Indonesia (collectively ~50%).
Reforms & Innovations	National Maritime Policy finalised; National Shipping Policy launched. AI Maritime Secretariat established. 100% e office rollout, Pakistan Single Win-dow integrated with the Port Community System, electronic asset disposal system introduced.
Strategic Outlook	Focus on digitalisation, capacity expansion, workforce optimisation, and alignment with IMO conventions. Positioned to leverage the long coastline and strategic location for **blue economy growth.**

Qasim International Container Terminal (QICT)

QICT, often referred to as DP World Karachi, remains the premier gateway for containerised trade in Pakistan. As the country's first private-sector container terminal, it continues to lead in technological adoption and hinterland connectivity.

It is located at Berths 5, 6, and 7 (Terminal 1) within Port Muhammad Bin Qasim, approximately 50 km southeast of Karachi's city centre. It is designed to handle two medium-sized container vessels or one large vessel and one smaller feeder simultaneously.
T1 is operated by DP World (which holds a 75% stake) in partnership with International Terminal Holding Limited (25%). It operates under a Build, Operate, and Transfer (BOT) concession agreement with the Port Qasim Authority (PQA).

Major global carriers, including Maersk, MSC, COSCO, CMA CGM, and Hapag-Lloyd, call at QICT, offering regular weekly rotations connecting Pakistan to the Far East, Europe, and the Middle East.
The average Vessel Turnaround Time for feeder vessels is 12 – 16 Hours. The average turnaround for larger vessels is 28 – 36 Hours. Gross Crane Moves/Hour is 22 – 25 Moves Crane Intensity 2 – 3 Cranes per vessel. The combined length of 1,327 meters allows DP World Karachi to berth up to four to five vessels simultaneously. This flexibility allows QICT to maintain a lower congestion rate than other terminals at Karachi Port.

Facilities

- Quay length 600 metres.
- 12 to 12.5 metres draught.
- 250 reefer points for temperature-controlled cargo
- The container yard area is 24 hectares
- The backbone of the terminal is Navis (N4/SPARCS), the global gold standard for port operations.
- The terminal is fully integrated with Pakistan's national customs software, Web-Based One Custom (WeBOC), enabling paperless clearing and round-the-clock import/export processing.

USP

- Strategic location outside the main Karachi city limits reduces transit delays
- The only terminal in Pakistan with integrated rail-to-quay capabilities
- Advanced "Zodiac" terminal operating system with real-time SMS and online tracking
- Backed by DP World's global network, ensuring international operational standards and security

Pakistan

Key Data	
Port Code	PKBQM
Operator	DP World
Year of Establishment	1997
Installed Capacity	850,000
Throughput	450,000 per annum
Utilisation	53%
CEO	Junaid Zamir
Website	www.dpworld.com / lfs.qict.com.pk

Equipments

- 6 Units (Post-Panamax)
- 21 units RTG
- 8 units Reach Stackers
- 46 Internal transfer vehicles

Rail/Road Connectivity

A dedicated 14 km railway line connects the terminal directly to the National Railway Network. This terminal houses the primary rail siding and the 6-track formation area (5 operational tracks + 1 escape track). It is the historical heart of the port's rail operations. It features 6 railway tracks, enabling the efficient movement of "block trains" to inland destinations. For "block trains," the terminal utilises a "vessel-to-rail" strategy. T1 containers need to move shorter distances to the siding than T2 containers. T1 feeds containers to all major dry ports nationwide. The ICDs served in Punjab by road and rail are: Lahore Dry Port (Mughalpura), Faisalabad Dry Port, Multan Dry Port, and Sialkot International Container Terminal (SICTL). Peshawar Dry Port in Khyber Pakhtunkhwa, Islamabad Dry Port and Rawalpindi Dry Port in the Federal Capital. The terminal is 15 km from the National Highway (N-5) and offers a direct road link to the upcountry industrial hubs of Punjab and Khyber Pakhtunkhwa.

Sri Lanka's Colombo Port Breaks Throughput Record, Strengthens Standing in Global Logistics

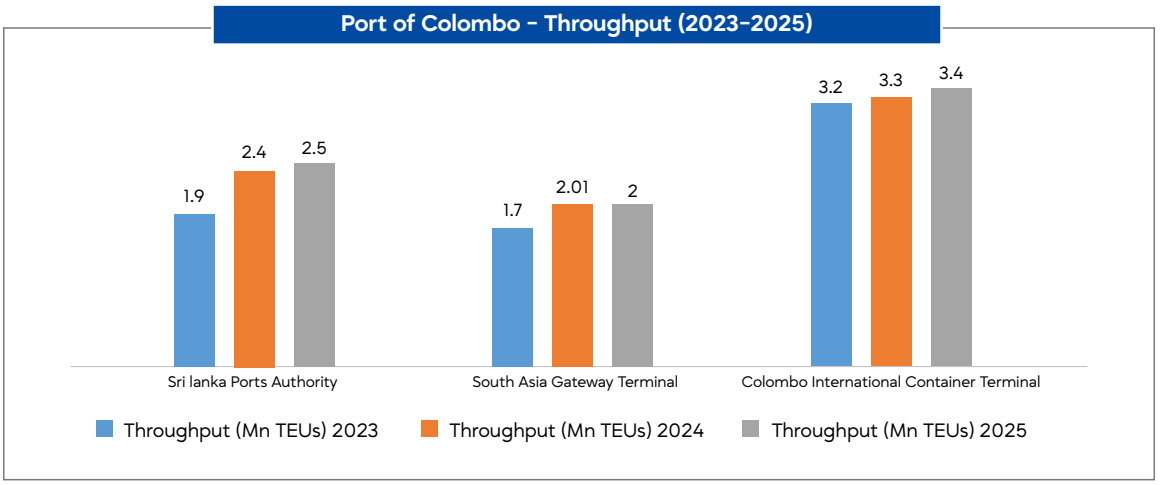
Colombo Port stands as South Asia's leading transhipment hub, strategically positioned in the Indian Ocean to connect regional ports with global shipping routes. Handling ultra-large vessels through its deep-water terminals, Colombo links the Indian subcontinent to Europe, East Asia, and North America while serving feeder networks across the Middle East, East Africa, and Southeast Asia. With modern facilities, high crane productivity, and rising throughput, Sri Lanka has reinforced its role as a pivotal gateway for regional and international container trade.

Terminal Contributions

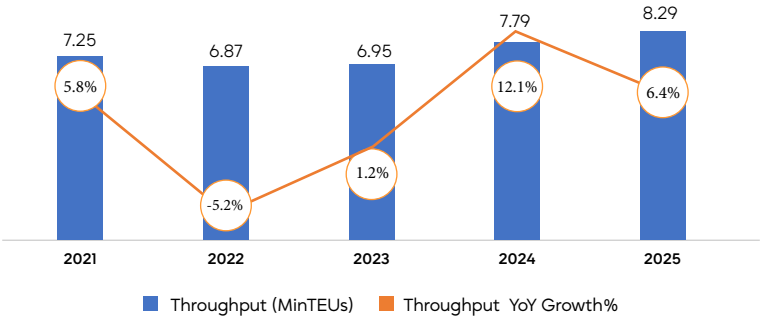
- **SLPA Terminals:** Delivered stability and scale, handling a significant share of volumes. The East Container Terminal (ECT) managed ultra large vessels exceeding 400 meters and 23,000 TEUs, emerging as the fastest growing contributor.
- **CICT:** Maintained its role as a deep water gateway, offering high berth productivity and consistent yard performance for ultra large vessels.
- **SAGT:** Provided dependable service for regional and transhipment cargo, reinforcing Colombo's role as a preferred hub.
- **CWIT:** Progress at the Colombo West International Terminal signals future capacity expansion and long-term strategic relevance.

Colombo's record performance comes amid global shipping realignments, fleet expansion, and cost pressures. The port's ability to attract vessel calls, retain transhipment volumes, and improve turnaround times highlights its operational maturity and commercial credibility. With advanced infrastructure, expanding capacity, and effective coordination among operators, regulators, and logistics partners, Colombo is positioned for an even greater role in global shipping and South Asian trade integration.

Surpassing 8.29 million TEUs positions the Port of Colombo on a firmer footing to expand its role within global shipping networks while supporting Sri Lanka's wider economic objectives. Continued focus on capacity enhancement, digitalisation, workforce capability and service reliability will be central to maintaining momentum. The 2025 milestone is not an endpoint, but a clear signal that the Port of Colombo possesses the structure, partnerships and operational discipline required to perform at scale, with consistency and confidence, in an increasingly demanding global market.



Colombo Port Total Throughput (Mn TEUs)during FY 2020-2025



Stronger local trade drives Colombo Port throughput growth in 2025

Transshipment Traffic

Transshipment volumes rose 5.1% year on year to 5.52 million TEUs, up from 5.25 million TEUs in 2024. This segment accounted for nearly 80% of total containers, underscoring Colombo's role as a leading South Asian hub.

Overall Throughput

The port handled 6.92 million TEUs during the first ten months of 2025, a 7.1% increase over the same period in 2024. While transhipment remained the backbone of operations, domestic cargo expanded more rapidly, rising 13.9% to 1.1 million TEUs compared with 0.96 million TEUs a year earlier. Growth momentum accelerated in October, with total throughput reaching 744,792 TEUs (+10.8% YoY). Transhipment volumes climbed 7.9% to 578,930 TEUs, while domestic cargo surged 16.5% to 123,962 TEUs, highlighting stronger local trade flows.

Ancillary Operations restowing activity strengthened, with volumes up 22.8% YoY to 0.31 million TEUs between January and October. October alone recorded a 44% increase, reflecting improved operational efficiency.

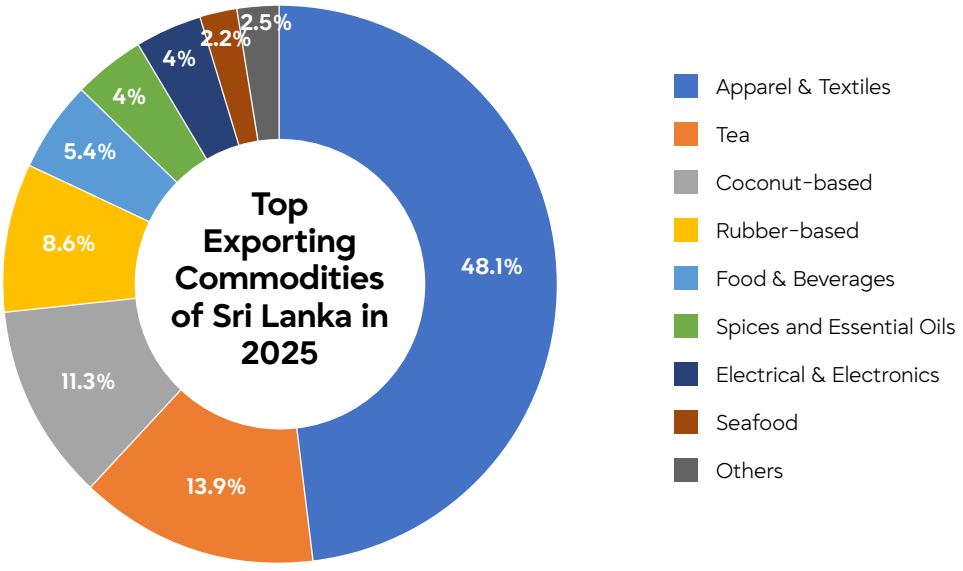
Cargo Handling

Colombo processed 105 million metric tonnes of cargo in the first ten months of 2025, a 4.4% rise from 2024. Discharged cargo grew 4.7% to 58 million tonnes, while loaded cargo rose 3.9% to 47 million tonnes.

National Maritime Activity Beyond Colombo, vessel arrivals across Sri Lanka's major ports—Colombo, Galle, Trincomalee, and Hambantota—rose 12.5% YoY to 4,251 ships. October alone saw 459 ship calls, up nearly 13%, signalling a broader recovery in maritime traffic nationwide.

Exports Record US$ 15.8 Billion as Sri Lanka Maintains Upward Trade Momentum

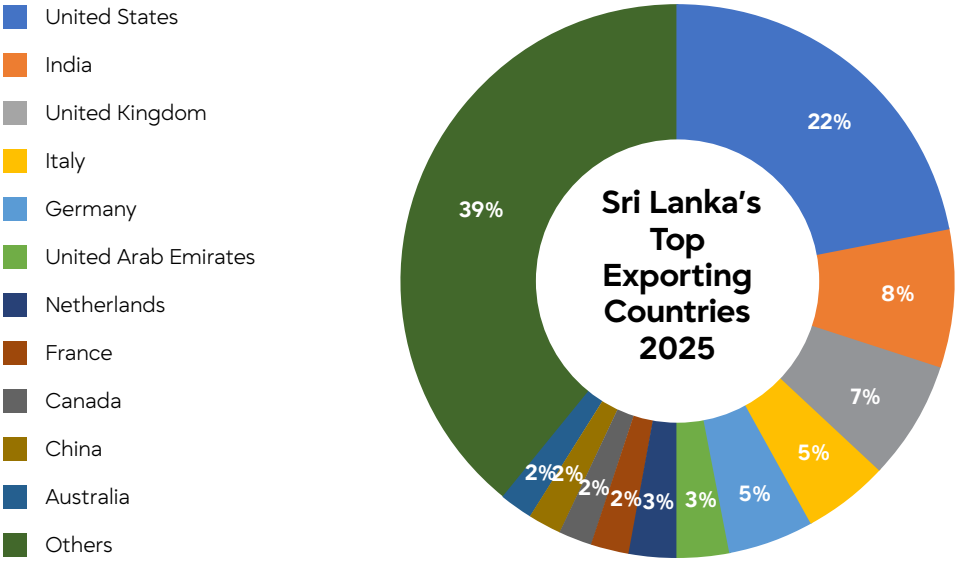
Sri Lanka's merchandise export sector has continued its strong upward trajectory, recording a significant 6.1 % y-o-y growth in 2025. Coconut-based products saw significant growth, with a 44% increase in the same period. Apparel remained the largest contributor, sustaining Sri Lanka's global competitiveness, while rubber products and fisheries posted the fastest growth, reflecting diversification into higher-value sectors. Tea exports continued to anchor traditional markets, while gems and jewellery added resilience through niche demand. Agricultural produce, including spices and coconut products, supported broader regional trade. Together, these commodities highlight Sri Lanka's ability to balance established strengths with emerging opportunities, reinforcing its role in South Asia's export landscape.



Sri Lanka's Export Performance in Major Markets

Among the top 10 export destinations, The United States, India, Italy, Germany, the United Arab Emirates, the Netherlands, France and China recorded year-on-year growth in 2025.

- The United States, Sri Lanka's largest single export market, accounting for 22% of the country's merchandise exports, recorded an increase by 2.8 % in 2025.
- India has continued as Sri Lanka's second-largest export destination, surpassing the United Kingdom. Exports to India increased by 19.9 %.
- Exports to the United Kingdom recorded a growth of 2.5 % in the same period.



Colombo International Container Terminal (CICT)

CICT remains the "Deep-Water Gateway" of South Asia. It is the only terminal in the region currently capable of handling the latest generation of Ultra-Large Container Vessels (ULCVs) with capacities exceeding 24,000 TEUs, making it a critical node on the East-West Maritime Silk Road

It is located at the Colombo South Harbour, Port of Colombo, Sri Lanka. The terminal won the Best Container Terminal in Asia" for several consecutive years. CICT is a joint venture that represents a strategic alliance between China and Sri Lanka. The Partnership is under a 35-year BOT agreement. The terminal is owned by China Merchants Port Holdings (CMPort) with an 85% stake and Sri Lanka Ports Authority (SLPA) with a 15% stake. The project represented a direct foreign investment of approximately US$500 million, the largest of its kind in the Sri Lankan port sector at the time of construction.

In 2026, the port handled nearly 40% of the entire Port of Colombo's record 8.29 million TEU volume. CICT is the preferred hub for the world's three major shipping alliances: 2M, Ocean Alliance, and THE Alliance. It is the primary call for mega-ships on the Asia-Europe and Asia-US East Coast routes. Major carriers include MSC, Maersk, CMA CGM, COSCO, and Evergreen. Over 80% of volume is transhipment, with a significant portion being "re-shipped" to the Indian Subcontinent via feeder networks.

Facilities

- 1,200 meters of continuous quay length with an alongside depth of 18 to 20 meters
- Over 600 reefer plug points
- The only terminal in South Asia capable of berthing 400m-long vessels with drafts up to 18m without tidal restrictions.

USP

- Consistent Gross Crane Rates (GCR) of 30–35 moves per hour, making it one of the most productive terminals in the China Merchants global portfolio.
- A pioneer in green energy, featuring a 100% electric RTG fleet and advanced carbon-tracking for all transhipment cargo.
- Located at the mouth of the new South Harbour, offering the easiest approach for large vessels compared with the older, narrower harbour basins.

CFS

CICT is linked to the South Asia Commercial and Logistics Hub (SACL), a massive US US$392 million complex expected to be completed by the end of 2026. It provides 5 million square feet of space and a storage capacity of 530,000 CBM. It promises to offer a "full gamut" of logistics services. It is directly linked to Bandaranaike International Airport via the Port Access Elevated Highway, facilitating seamless multi-modal transport.

Srilanka

Key Data	
Port Code	LKCMB
Operator	CICT
Year of Establishment	2013
Installed Capacity	3.2 Million TEUs per annum
Throughput	3.2 million TEUs
Utilisation	100%
CEO	Jack Huang
Website	www.cict.lk

Equipments

- 14 Super Post-Panamax Ship-to-Shore quay cranes with a reach of 24 rows across
- 46 Rubber Tyred Gantry yard cranes—the majority are fully electric (e-RTGs) for zero-emission yard operations
- Over 100 Terminal Tractors

Rail/Road Connectivity

CICT utilises a common-user rail siding in the South Harbour hinterland. This siding is managed by SLR in coordination with the SLPA. The rail connection supports 1–2 dedicated freight trains per day, transporting heavy industrial raw materials or bulk liquid ISO tankers to inland locations such as Veyangoda. The Mabole/Wattala Cluster is home to major private ICDs operated by Aitken Spence and John Keells Logistics, which are digitally linked to CICT's Navis N4 system.

Charting a new course: Update on IMO's Net-Zero Framework (NZF), other regulations, and the future of "Maritime shipping"

The global maritime shipping landscape is undergoing continuous transformation due to initiatives from international regulators and decarbonisation efforts led by regional bodies such as the European Union. A range of regulations and short- to mid-term measures are driving progress towards the industry's net-zero emissions target by 2050. These measures include the Carbon Intensity Indicator (CII), IMO's 2023 Strategy on Reduction of Greenhouse Gas (GHG) Emissions, EU Emissions Trading System (EU ETS) and FuelEU Maritime.

This section explores key decarbonisation initiatives shaping maritime shipping and outlines strategic business decisions for shipowners, charterers and other stakeholders aiming for net-zero emissions by 2050.

IMO NZF: Overview and strategic implications

The International Maritime Organisation's (IMO's) Marine Environment Protection Committee (MEPC) 83rd session, which was held in April 2025, approved the draft legal text on the new regulation—NZF under MARPOL Annex VI, which introduces mid-term measures to reduce GHG emissions from vessels.

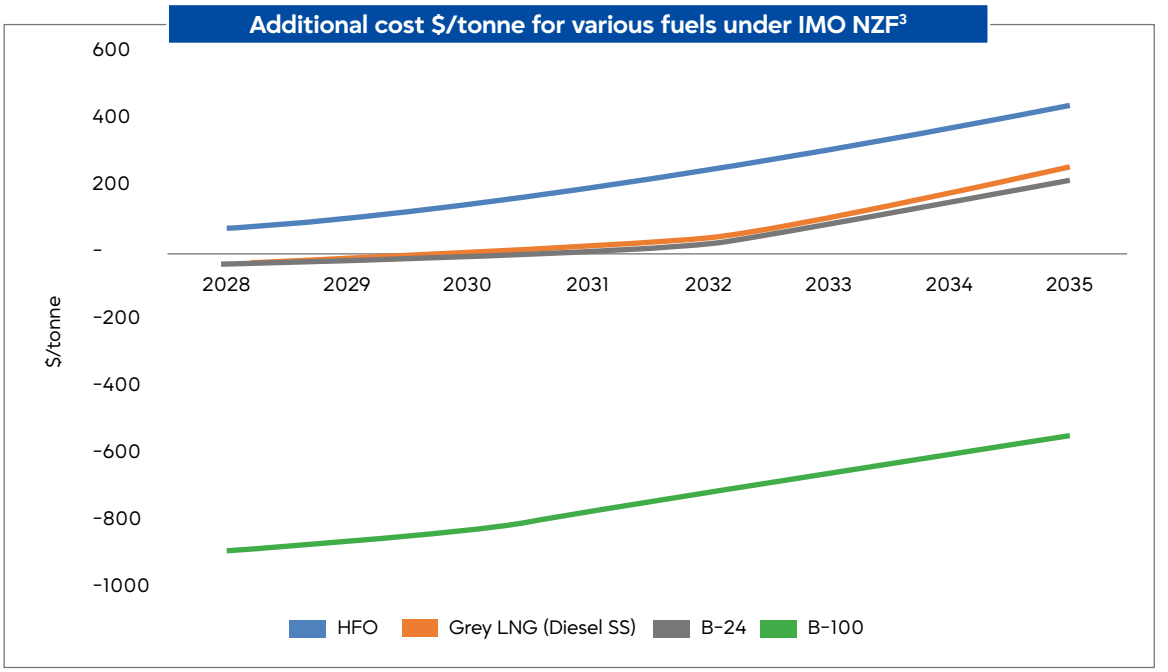
Application and exceptions

The Regulation will apply to all ships of **5,000 gross tonnage** and above, except ships solely engaged in voyages within national waters; ships not propelled by mechanical means; platforms, including FPSOs and FSUs[1] and drilling rigs (regardless of their propulsion), and semi-submersible vessels.

Comparison of fuels under IMO NZF: HFO, Grey LNG (Diesel SS)[2] and biofuels
The Greenhouse Gas Fuel Intensity (GFI) values for different fuels vary, which can create either a deficit or a surplus of compliance units under the IMO NZF.

Denotes: *[1] FPSOs (floating production, storage, and offloading units) and FSUs (floating storage units) are specialised offshore vessels used in the oil and gas industry to process and store LNG.*

Comparison of fuels under IMO NZF: HFO, Grey LNG (Diesel SS)[2] and biofuels
The Greenhouse Gas Fuel Intensity (GFI) values for different fuels vary, which can create either a deficit or a surplus of compliance units under the IMO NZF.



Source: Drewry

Burning HFO will be subject to penalties from "Day 1" of the IMO NZF implementation, but it could remain compliant if blended with higher grades of biofuels. Grey LNG will also be penalised in the coming years (around 2029, depending on the GFI value considered) and, therefore, it must be blended with bio-LNG to remain compliant. B-100 biofuel will be compliant beyond 2035 under IMO NZF.

Delay in NZF adoption, but green signals continue; proposed recommendations for various stakeholders

The above draft text was up for adoption through a round of voting during the extraordinary MEPC session of October 2025. However, the IMO's efforts to develop mid-term measures through the NFZ did not proceed as anticipated. A majority voted in favour of a "one-year delay" in deciding whether to adopt the framework.

Despite the postponement, the IMO's overall GHG strategy (2023) remains in place, and decisions will continue to drive the GHG emission-reduction targets outlined in the strategy. The decarbonisation drive is supported by regional regulations, companies' internal targets and their commitment towards customers, and push from various stakeholders such as financial institutions, charterers and insurers.

Denotes: *[2] It is to be noted that LNG has different tank-to-wake GHG emissions for different engine technologies available in the market, using various mechanisms for burning LNG in the engine. (Diesel SS corresponds to Diesel slow-speed engines)*
[3] The GFI intensity is considered similar to FuelEU Maritime values

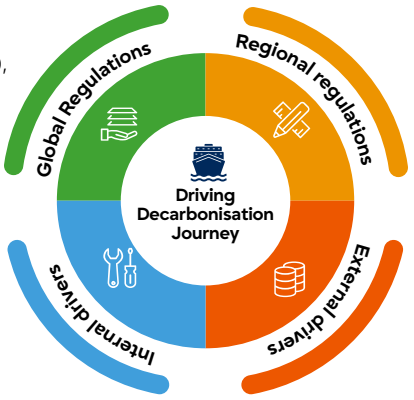
Driving Decarbonisation journey

IMO's strategy and short-term measures

- GHG reduction targets already adopted by IMO (for the year 2030, 2040 and 2050)
- Short-term measures (CII) already enforced
- Data collection platforms established

Company's internal targets

- Internal targets of various companies
- Companies' green commitment to the customers
- Companies' ongoing projects and invested capital into green technologies



EU regulations

- Already enforced market-based regulations (EU ETS and FuelEU Maritime)
- Established data collection platforms
- Well-defined and documented penalties
- Strict implementation
- More upcoming regional regulations

Other drivers

- Push from financing stakeholders
- Push from end customers
- Push from charterers
- Push from marine insurers

Source: Drewry

Green signals continue unabated, despite the delay in NZF adoption

Despite the drivers mentioned above, the shipping industry recognises the need for a single global framework and for bridging the price gap between conventional fuel and zero- and near-zero-emissions (ZNZ) fuels.

Post the delay in the adoption of NZF, there are a few developments that give a clear indication of the continuing decarbonisation journey.

- Of the 13 suppliers that had applied for the license to supply methanol bunkers in Singapore, three were selected in November 2025. The large number of applications indicates that bunker suppliers anticipate high future demand.
- The Global Centre for Maritime Decarbonisation (GCMD) announced the world's first vessel retrofit fund using a "pay-as-you-save" model and named it the Fund for Energy Efficiency Technologies (FEET). Shipowners would be offered up to 100% upfront financing from this fund for retrofitting energy-efficient technologies and devices to improve a vessel's efficiency, with repayments linked to the savings generated by the installed technology. This is expected to encourage many shipowners to take the significant next step of investing in such equipment, while minimising repayment risks.
- Shipping giant NYK revised its "Green Bond Framework" to "Green/Transition Finance Framework" to become eligible for receiving not only bonds from investors but also loans from financial institutions. The shipping company plans to invest approximately JPY 450 billion (USD 2.9 billion) by 2030 to decarbonise various aspects of its operations and use these bonds/loans to fund future investments.
- The delivery of the world's first mono-fuel alternative fuel vessel (operating on methanol/ethanol) in China indicates the customers' growing confidence in the alcohol-based fuel and its availability.

Note: The withdrawal of the United States from the Paris Agreement and its view on the IMO's NZF regulation have created significant headwinds in global efforts to curb emissions.

A glimpse of global measures and regional regulations

Carbon intensity indicator (CII)

During the MEPC 83 in April 2025, the carbon intensity reduction factors were reviewed. From 2027 onwards, the annual growth in the reduction factor[4] has increased from 2% (at present) to 2.625%, which will result in a reduction factor of 21.5% by 2030 (up from 11% in 2026), reflecting the IMO's commitment to progressively address the GHG emissions from shipping.

EU ETS[5]
The EU ETS applies to ships of 5,000 GT and above, and requires vessels to purchase European Union Allowances (EUAs) equivalent to the absolute GHG emissions during the year. The available EUAs in the market will be reduced every year to drive down emissions. The EU ETS was implemented in three phases, whereby 40% of carbon emitted (CO_2 emissions) was under its scope in 2024, increasing to 70% of carbon emitted (CO_2 emissions) in 2025.

From 1 January 2026, other greenhouse gases (CH_4 + N_2O) have also been included, in addition to CO_2. Shipping companies will be required to submit allowances for 100% of their GHG emissions (CO_2 + CH_4 + N_2O) for all voyages for their visit to the EU/EEA[6] ports (including port emissions during operations).
Overall, EU ETS-related costs are expected to increase substantially in 2026, depending on the market price of EUAs, which is approaching an all-time high.

UK ETS
The UK has developed policy details to include its domestic maritime GHG emissions under the UK ETS from 1 July 2026. This regulation applies to vessels of 5,000 GT and above that undertake domestic voyages among UK ports.

FuelEU Maritime[7]
The FuelEU Maritime Regulation applies to all commercial vessels of above 5,000 GT, requiring the life-cycle GHG intensity of fuel (GFI) is expected to decrease from 2% in 2025 to 80% in 2050. This means that all vessels running on conventional fuel are required to pay a penalty.

This regulation applies to vessels calling ports in the EU/EEA. It is worth noting that in the long run, FuelEU Maritime will have a far greater financial impact than the EU ETS.

Future of decarbonisation in maritime shipping

The IMO NZF (if adopted) could be the first global regulation to include a GHG pricing mechanism. However, the decarbonisation targets will be driven by the IMO's 2023 GHG strategy, and meeting its 2030 sub-target seems challenging. Other countries are considering establishing their own ETSs after the successful revenue generation through the EU ETS. The deferred implementation of the IMO NZF can delay dual-fuel newbuildings, as vessels with ready status will be preferred.

The demand for green fuels will weaken in the near future, and charters will likely postpone agreeing on a premium for long-term dual-fuel vessel charters due to uncertainty surrounding the adoption of global regulations. The chicken-and-egg dynamic persists between the demand and supply of alternative fuels. While these fuels will be adopted in the long term to run dual-fuel ships, early movers such as shipowners will benefit from the upcoming regulatory frameworks. A strategy needs to be formulated for constructing newbuilding yards for building dual-fuel vessels and repair yards for carrying out dual-fuel retrofits.

Ports may delay their plans for developing bunkering infrastructure for low-emission fuels due to the delay in NZF adoption, while engine designers will require significant developments to comply with future requirements. Any lack of regulatory clarity could hinder the development of new products. The retrofitting of energy-saving devices (ESDs) and propulsion-improving devices (PIDs) is still expected to continue at the same pace, but their demand will not increase at the pace initially expected. However, if the IMO NZF framework is implemented in due course, it will incentivise low-emission ships. Similarly, national and regional governments are providing grants for clean fuels and green technologies to sustain momentum toward decarbonization.

Denotes: *[4] Reduction factor relative to 2019*
[5] Offshore vessels (5,000 GT and above) will be included in the EU ETS scope from 2027. However, the inclusion of offshore vessels in the 400–5,000 GT range have not yet been decided and will be determined during the EU ETS review in 2026.
[6] EEA stands for European Economic Area. The EEA, comprising 30 countries (27 EU Member States, Iceland, Liechtenstein, and Norway), aims to strengthen trade and economic relations among its members.
[7] There are no major updates for the FuelEU Maritime regulation in 2026, but it is mentioned here just to keep the readers informed.
[8] 'Ready status' ships are those vessels that are equipped with provisions to enable future engine retrofits for alternative fuels like methanol, ammonia, or LNG.

BEHIND THE REPORT

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Dr. Subrata Kumar Behera with an industry experience of 18+ years is well versed in international trade and transport. He works in the container and ports team at Drewry. He has worked on the India and other emerging market Container Business Analysis. He is a Doctorate from the School of International Studies, Jawaharlal Nehru University, New Delhi. Besides his doctoral thesis, he has number of research publications to his credit.

Drewry is proud to be associated with Maritime Gateway as Knowledge Partner for South Asia Containers Market Report 2026. It is our pleasure to present this white paper.

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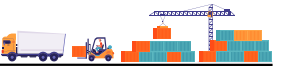

Lynkit.

Orchestrating Efficiency

50% Less time spent by trailer

15% Reduced fuel

5 Seconds for gate in and out

Gate In

- RFID-based universal e-seal reading and count detection
- Automatic ISO code recognition for containers
- OCR-based hazard code detection (Class 1–9)
- 360° container damage capture and grading
- Auto-generated reports with email sharing

In Yard

- Optimized task sequencing to reduce moves and shuffles
- End-to-end time analytics for road and rail
- Smart equipment allocation across yard assets
- Schedule examination requests and internal jobs

Gate Out

- Automated boom barrier with container verification
- Digital task creation with real-time alerts
- Damage report comparsion between in and out
- Faster container and trailer evacuation

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