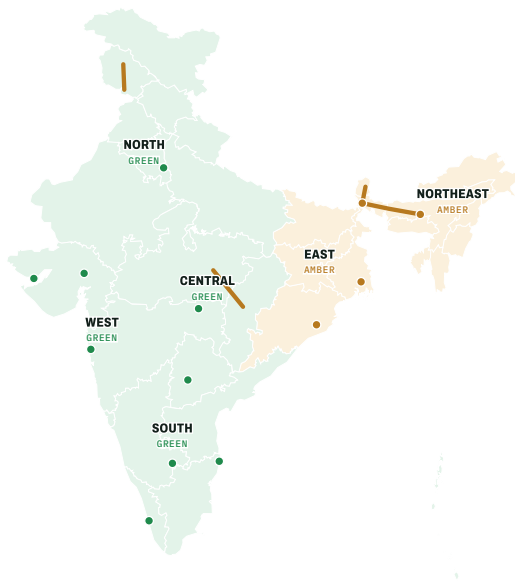


The sale doubles, and heads for small towns

● NETWORK: AMBER

Amazon says orders doubled on last year as the sales opened, and Flipkart says six in ten came from outside the metros¹. That wave reaches the hubs this weekend and the doorsteps from Monday, just as Kolkata's Puja curbs begin. Meanwhile the roads keep stopping: trucks held at the Assam–Bengal border, farmers on NH-30 and protest curbs in central Delhi today.

HOW'S EACH REGION HOLDING UP?



DATES TO WATCH

● Sat 10 Oct	Kolkata Mahalaya truck ban ²
● Sat 10 Oct	Central Delhi protest curbs
● 10–15 Oct	NH-10 night closures
● Tue 13 Oct	Karnataka cane farmers' blockade threat ³
● 13–27 Oct	Kolkata Puja curbs and immersions
● Thu 15 Oct	Navi Mumbai demurrage waiver ends ⁴
● 26 Oct–5 Nov	NH-10 night closures, again
● Sat 31 Oct	Delhi's BS-IV exemption ends
● GREEN	the sale season as usual, which can still be busy
● AMBER	something beyond the season is slowing freight
● RED	something is stopping freight across a state or a route

North

● GREEN

Panipat and Hisar are two of the four seller towns Flipkart says grew fastest on early-access day, so expect heavy pickups out of Haryana this weekend. Central Delhi is under protest curbs today: diversions at 30 points from 6 am, some trains cancelled and mobile internet blocked within 4 km of the Janpath–Kartavya Path crossing⁵.

West

● GREEN

Bhiwandi heads Flipkart's list of fast-growing seller towns, so its pickups peak now, and a first-mile surge reaches the receiving hubs in a day or two. The port side is quiet: JNPA turned trucks round in under an hour and a half yesterday⁶.

South

● GREEN

Chennai airport's cargo terminal handles about 1,200 tonnes a day, nearly 30% more than last year, and hundreds of trucks park on GST Road daily for want of space; AAI has just bought 19 acres to park them⁷. Karnataka's cane farmers threaten highway blockades from Tuesday if Monday's talks in Delhi fail³.

East

● AMBER

Three of the four buyer towns Flipkart says grew fastest at the sale's start are in Bengal and Bihar, so the East's last mile takes the wave next week, into Kolkata's Puja curbs from Tuesday. Today Kolkata bans goods vehicles from 3 am to 10 pm for Mahalaya².

Northeast

● AMBER

The gateway out of Assam is jammed the other way, with outbound trucks held at the Bengal border for days. Trucks that can't get out can't come back with the next load in either, which matters on the day Kolkata's hubs slow down.

Central

● GREEN

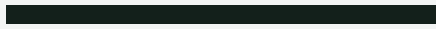
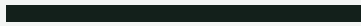
Farmers blocked NH-30 in Kabirdham yesterday over cane and paddy prices. One district for one day, so it's Green, but it is actually the region's first real news all week.

NETWORK INSIGHTS

1 Twice the orders, and most go to small towns

Festive parcels, first mile to last mile

MEDIUM CONFIDENCE

Share from outside the big metros at the sale's start (Amazon: visits beyond the top nine; Flipkart: demand)^{8,9}Amazon  72%Flipkart  about 60%

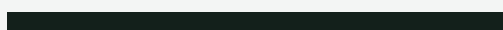
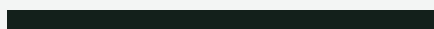
Amazon claims its sellers took more than twice last year's units in the first 24 hours, with 72% of visits from beyond the top nine metros⁸. Flipkart says about 60% of its opening-hour demand came from outside the metros, with Panskura, Kishanganj, Sheikhpura and Sardulgarh among its fastest-growing towns, and its sellers in Bhiwandi, Panipat, Tirupur and Hisar leading the surge⁹. Orders from Thursday and Friday reach the receiving hubs this weekend and the doorsteps from about Monday, and three of those four fast-growing buyer towns are in Bengal and Bihar. Large appliances, which need two people at the door, sold at 50 times a normal day on Amazon¹.

So the hard week for the last mile is next week, not this one, and it's hardest in the small towns of the east. The exposure sits with brands selling appliances and premium phones into tier-3 India on promised dates.

2 Record boxes at JNPA, and fewer trains

Containers from JNPA inland

HIGH CONFIDENCE

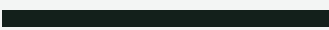
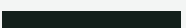
Rail's share of JNPA's boxes, April-September¹⁰2025  14.8%2026  12.7%

JNPA handled a record 834,697 TEUs in September, 29% more than a year earlier and its second record month running¹⁰. The trains didn't keep up: 577 rakes left the port against 611 a year ago, and rail's share of its boxes slipped to about 12.7% in the first half from 14.8%, with the Western freight corridor now running all the way in¹⁰. So where did the extra boxes go? By road presumably? The port itself is coping, which is the good news; the strain shows up on the highways out of Mumbai instead, in the busiest weeks of the road year.

The freight corridor was meant to take the peak off the road. On these numbers it isn't, yet, and the exposure sits with inland importers paying truck rates for boxes that could have gone by train.

3 Fewer tax stops, but the gates still hold trucks

MEDIUM CONFIDENCE

E-way bills in September, million (change on last year)¹¹Within a state  91.64 (+6.6%)Between states  49.85 (+8.2%)

September's 141.53 million e-way bills were a record, and the ones crossing state lines grew fastest, 8.2% to 49.85 million¹¹. On Thursday the GST Council moved to stop fewer of those trucks: a vehicle is pulled over only on specific intelligence with a Joint Commissioner's sign-off, and goods crossing several states are checked mainly where they start and end¹². Transporters have asked for this for years, because a paperwork slip can cost a penalty of 200% of the tax¹². Except the tax officer isn't the only one at the gate, as the trucks stuck at the Assam-Bengal border with their e-way bills in hand show. No start date has been given yet either.

So the rule makes the paperwork stop rarer, not every stop. It matters most for interstate B2B loads in the peak, where a day held at a check post is a day off a festive shelf.

4 Blue Dart borrows the post office's last mile

MEDIUM CONFIDENCE

Blue Dart signed up yesterday to deliver parcels through India Post's 164,000 post offices, prepaid and cash on delivery, with OTP checks and tracking, in towns, villages and remote areas¹³. Why would an express carrier pay to use the post office? Because the last mile in small-town India is actually the expensive bit, and the postman is already there every day. The release gives no start date and no volumes, so whether any of it carries this Diwali's parcels is yet to be seen.

One more national carrier can now reach the small towns, at the post office's pace rather than an express one. The exposure sits with brands whose festive growth is in tier-3 India and who sell on promised dates.

THE LANES I'M WATCHING

NH-27 at Srirampur

● AMBER

THE NORTHEAST'S ROAD OUT, AT THE BENGAL BORDER

Hundreds of outbound trucks with coal and petroleum coke held for days at Srirampur and Buxirhat; Bengal Police cite insufficient papers, drivers say they carry e-way bills, and their association has asked the PMO to step in¹⁴.

NH-30 Raipur-Jabalpur

● AMBER

CHHATTISGARH TO MADHYA PRADESH

A farmers' tractor rally in Kabirdham backed traffic up along 20 km yesterday¹⁵. Amber till Monday unless the stir goes indefinite.

NH-10 Siliguri-Gangtok

● AMBER

SIKKIM'S ONE AND ONLY TRUNK ROAD

Shut to all vehicles 9 pm to 6 am on the Sevoke-Rangpo stretch till 15th October, and again 26th October–5th November¹⁶.

NH-44 Jammu-Srinagar

● AMBER

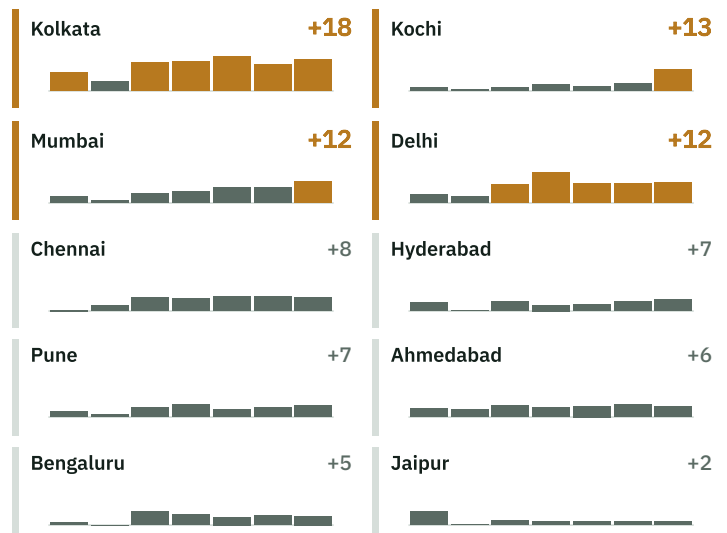
KASHMIR'S ALL-WEATHER LINK

Very slow between Marog and Kishtwari Pather, 30–40 minute delays at Dawal, and Kashmir-bound tankers held 7 am to 3 pm¹⁷.

MEASURED THIS MORNING

City roads against usual, daily, 3–9 Oct¹⁸ **amber** = 10+ over

Kochi jumped to 13 points over usual yesterday from 4, and Delhi and Mumbai both reached 12. Kolkata stayed the highest at 18, the day before its Mahalaya ban, and every other city stayed under 10.



SOURCES

Built from public sources only. I rate against the season, because a sale week is never going to look like a quiet week in April, right? A Red road drags down the hubs at both ends, and a hub stays Amber about two days after its cause clears, longer after a Red. Air shows up only with measured numbers (AAI, WorldACD). Confidence is High when the facts are dated and primary or measured, Medium when they rest on a proxy or a forecast. If I am wrong, we'll find out in the subsequent weeks. The ratings are my judgement on the likelihood of on-time delivery or cost-impact, not measured service levels or actual cost estimates. Map boundaries: DataMeet, CC BY 4.0.

1. CNBC TV18: Amazon and Flipkart sale openings, 10 Oct
2. Millennium Post: Kolkata Police Puja traffic plan, 5 Oct
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5. The Statesman: Delhi traffic advisory for the CJP protest, 9 Oct
6. JNPA: daily status report, 9 Oct
7. Times of India: AAI buys land for truck parking at Chennai cargo terminal, 9 Oct
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10. Maritime Gateway: JNPA record September throughput, 9 Oct
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18. TomTom Traffic Index: congestion against usual, ten cities