

Will small-town India get its parcels on time?

● NETWORK: AMBER

Redseer reckons shoppers placed 80 to 90 million orders in the sale's first two days, two-thirds of them from smaller towns and villages¹, and this is the week those parcels reach the doorstep, so the strain moves from the hubs to the last mile. Kolkata's Puja curbs start tomorrow, and Karnataka's cane farmers say they'll block highways from tomorrow too, if today's talks in Delhi fail². And diesel just got ₹3 dearer at Jio-bp's pumps, the second private retailer to raise prices in ten days³.

Since Edition 001: the East is back to Green with the bandh and Mahalaya behind it; the Northeast is Amber for the trucks held at the Bengal border, and the North for today's rain and protest diversions. Edition 001's three calls fall due this week, so I'll score them next Monday.

HOW'S EACH REGION HOLDING UP?



DATES TO WATCH

● Mon 12 Oct	Central Delhi protest diversions
● 12–15 Oct	NH-10 night closures
● Tue 13 Oct	Karnataka cane farmers' blockade threat
● 13–24 Oct	Kolkata Puja curbs and immersions
● 26–27 Oct	Kolkata Puja curbs and immersions, again
● 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 ● AMBER	Delhi woke up to a red alert for heavy rain in all 11 districts ⁴ , on a third day of protest diversions around central Delhi ⁵ , and its roads ran 15 to 23 points over usual from 8 am, with up to 139 km of jams ⁶ . That's beyond the season, so deliveries and pick-ups across Delhi run late today. Lucknow is flooded for a 15th day ⁷ , and deliveries there wait for the water.
West ● GREEN	JNPA's yard was 62% full this morning, with 2,268 boxes waiting for trains inland, up from 1,715 on Saturday ⁸ , so importers may wait longer for a train out. A week of logs is too short to call that a trend.
South ● GREEN	If today's cane talks in Delhi fail, farmers block national highways at Karnataka's district headquarters from tomorrow, and trucks on Bengaluru–Pune and Bengaluru–Hyderabad could be held for hours. Elsewhere, no delay beyond the season.
East ● GREEN	Kolkata's Puja curbs start tomorrow, the usual Puja strain: deliveries into the city in set hours, port boxes four hours a day till the 19th. With the sale's small-town orders arriving the same week, how late does an East parcel run? I'd expect a day or two. Odisha's Kalinga ghat road has been shut for 19 days, so Ganjam–Kandhamal freight takes the long way round.
Northeast ● AMBER	No report from the Bengal border since Friday, so I count the trucks there as still held. Every truck stuck leaving Assam can't come back with the next load, so truck space into the Northeast stays tight.
Central ● GREEN	NH-30 comes off my list, with nothing new since Friday's Kabirdham blockade, and I found no delay beyond the usual sale strain.

DECISIONS FOR THE WEEK AHEAD, 12–18 OCT

- 1 From tomorrow till the 19th, Kolkata's goods vehicles get set hours, port trucks only noon to 4 pm, and none at all through the immersion days from the 20th⁹, in the same week the sale's orders reach the East's small towns. The orders are already placed, so the one lever left is what's sitting inside the city before the gates narrow. **Which Kolkata-bound loads, and which port boxes, go in before the curbs start on 13th October (Tuesday)?**
- 2 Delhi lets in BS-IV goods vehicles registered outside the city only till 31st October; after that, even essential supplies need BS-VI, CNG, LNG or electric trucks¹⁰. Transporters had hoped for an extension, and until one is actually announced I'd plan as if there isn't one, because finding compliant trucks in the last fortnight before Diwali is a lot harder than finding them this week. **How much of your Delhi-bound fleet, your own and your transporters', is BS-IV, and do you line up the replacements this week?**

NETWORK INSIGHTS

1 Fourteen days of orders, placed in two

Festive sale, first-mile to last-mile

MEDIUM CONFIDENCE

Redseer estimates ₹24,000 crore of goods and 80 to 90 million orders across all platforms in the sale's first two days, about 14 times the orders of a normal day; two-thirds of the 60 to 65 million shoppers were from Tier 2 towns and rural areas, and first-time shoppers doubled on last year¹. Meesho says its day-one orders were up about 75% on last year, and its sellers in Tier 4 and smaller towns doubled their transactions¹¹. So where are those parcels now? Picked up over the weekend, sorted at the receiving hubs, and, if a first-mile surge reaches the doorstep three or four days later as it usually does, out for delivery this week. The bit that actually worries me is the doubling of first-time shoppers. A first-time buyer is an address and a phone number nobody has delivered to before.

So this week, late deliveries are most likely in small towns and to first-time buyers, and the cost shows up as reattempts, cancelled cash-on-delivery orders and returns, for whoever promised a date before seeing where the orders came from.

2 Two prices for the same diesel

Truck fuel, at private and state pumps

● AMBER · HIGH COST OF DELAY · HIGH CONFIDENCE

Jio-bp raised diesel by ₹3 a litre from 6 am yesterday, to about ₹97.75 in Haryana, ten days after Nayara did the same, while Indian Oil, BPCL and HPCL held their prices³. The state retailers run 90% of the country's pumps and already cap diesel at 200 litres a sale, and a Punjab dealer told Mint that Jio-bp's own 50-litre cap may become irrelevant, as customers move to other retailers¹². So where does a truck fill up now? At the cheaper state pump, of course, which moves the demand onto the pumps that are already rationing, in the busiest month of the year.

₹3 on a ₹95 litre is about 3% on the fuel bill. A contract with a diesel clause passes that on, a fixed peak-season rate eats it, and if the state retailers move too, every truck rate in the country moves at once.

3 A new tax line on doorstep delivery

GST on e-commerce deliveries

MEDIUM CONFIDENCE

The GST Council on Thursday recommended 5% GST, with no input credit, on delivery services booked through e-commerce platforms (courier and postal aside), paid by the platform where the delivery partner isn't registered, and 5% on delivering goods ordered online¹³. Local delivery mostly carries 18% today, so it reads like a cut¹³. Except the Council also wants to pull the exemption for goods transport agencies carrying online orders to unregistered buyers, and with no input credit, Trade Brains reckons the saving could be eaten up, or even end up as higher delivery charges¹⁴. When does it start? Not until it's notified, and no date has been set.

If it's notified as recommended, a platform paying 18% on deliveries by unregistered riders pays 5% instead but loses the input credit, and a transporter carrying online orders to unregistered buyers pays a tax it didn't before. Until the notification, nobody's delivery cost changes.

4 Dearer boxes, billed later

Corrugated packaging

MEDIUM CONFIDENCE

BusinessLine reports that kraft paper, three-quarters of a corrugated box's cost, has gone up 25% in a few weeks, as imported waste paper got dearer with freight, the war and the rupee¹⁵. Box makers say they can't pass it on as fast: large customers take weeks or months to agree a new price¹⁵. So the box maker carries it through Diwali. Then it lands in the next contract.

Expect box suppliers to ask for more at the next renewal, after Diwali: kraft paper is three-quarters of a box's cost, so a 25% rise is roughly 19% on the box if they pass all of it on.

THE LANES I'M WATCHING

NH-27 at Srirampur

● AMBER

THE NORTHEAST'S ROAD OUT, AT THE BENGAL BORDER

Hundreds of outbound coal and petroleum-coke trucks held at Srirampur and Buxirhat for several days as of Friday's report; Bengal Police cite papers, and the Barauni calciners, who say the e-way bills and invoices are in order, have asked the PMO to step in¹⁶. Until they move, petroleum coke for Bihar's calciners isn't arriving, and those trucks aren't free for loads back into Assam.

NH-157 Kalinga ghat

● AMBER

GANJAM TO KANDHAMAL, ODISHA

Shut since heavy rain washed away part of the road on 24th September; Kandhamal's collector says light vehicles can pass 10 to 15 days after repairs finish, and last year the road was disrupted for about 42 days¹⁷. Till then, anything between Berhampur and Phulbani takes a long detour.

NH-10 Siliguri–Gangtok

● AMBER

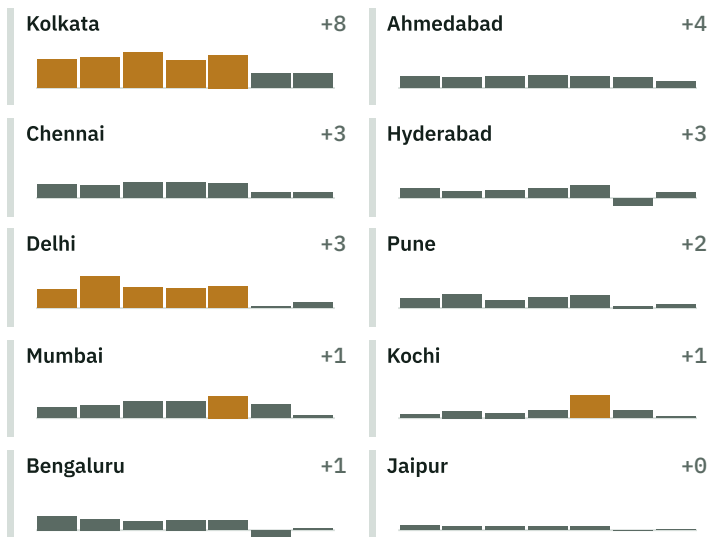
SIKKIM'S ONE AND ONLY TRUNK ROAD

Shut to all vehicles 9 pm to 6 am on the 52 km Sevoke–Rangpo stretch till Thursday, and again 26th October–5th November¹⁸. Sikkim gets its trucks by day only, so a load that misses the evening cut-off at Siliguri waits till morning.

MEASURED THIS MORNING

City roads against usual, daily, 5–11 Oct⁶ amber = 10+ over

Sunday was quiet almost everywhere: Kolkata ran 8 points over usual, the most of the ten cities, and no other city was more than 4 over. This afternoon is busier. Kolkata ran 33 to 38 over, about where its weekday afternoons have sat all month in the sale, and Delhi 16 to 17 over after the morning's rain.



CALLS I'LL CHECK NEXT WEEK

1. The state retailers hold diesel prices through 19th October, while Jio-bp's and Nayara's stay ₹3 a litre higher¹².
2. NH-157 over Kalinga ghat is still shut to trucks on 19th October¹⁷.
3. Delhi's BS-IV exemption has not been extended by 19th October¹⁰.

SOURCES

Built from public sources only. The ratings are my judgement on the likelihood of on-time delivery or cost-impact, not measured service levels or actual cost estimates. 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. Map boundaries: DataMeet, CC BY 4.0.

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| 1. Business Standard (PTI): Redseer on the sale's first two days, 11 Oct | 7. Bhaskar English: Lucknow floods, snow in Himachal and Uttarakhand, 12 Oct | 13. Taxscan: GST Council recommends 5% on e-commerce delivery services, 9 Oct |
| 2. ChiniMandi: Karnataka cane farmers' blockade threat, 10 Oct | 8. JNPA daily status report, 12 Oct | 14. Trade Brains: what the 5% delivery GST means for platforms, 12 Oct |
| 3. Financial Express: Jio-bp raises petrol ₹5, diesel ₹3, 11 Oct | 9. Millennium Post: Kolkata Police Puja traffic plan, 5 Oct | 15. BusinessLine: box makers face dearer kraft paper, 12 Oct |
| 4. News18 (PTI): red alert and waterlogging in Delhi-NCR, 12 Oct | 10. The Tribune: Delhi bars non-BS-VI goods vehicles, BS-IV till 31 Oct 2026, 27 Oct 2025 | 16. Sentinel Assam: trucks stranded at Assam-Bengal border, 9 Oct |
| 5. Organiser: Delhi Traffic Police advisory for 12 Oct, 30 points | 11. Business Upturn: Meesho day-one orders up about 75%, 12 Oct | 17. New Indian Express: Kalinga ghat closed for 19 days, 12 Oct |
| 6. TomTom Traffic Index: congestion against usual, ten cities | 12. Mint: Jio-bp is the second private retailer to raise prices in ten days, 11 Oct | 18. ThePrint: NH-10 night curbs (NHIDCL order), 5 Oct |