

Pune–Bengaluru blockade, Puja curbs and a border logjam

● NETWORK: AMBER

Monday's cane talks in Delhi ended with the promise of a committee and no price¹, so farmers in Karnataka and Maharashtra start blocking highways today, Pune–Bengaluru among them. Kolkata's Puja curbs start today too, which is the usual Puja strain. And at the Bengal border, trucks of petroleum coke from Assam have now waited nearly four weeks.

HOW'S EACH REGION HOLDING UP?



DATES TO WATCH

● Tue 13 Oct	Cane farmers' highway blockades
● 13–24 Oct	Kolkata Puja curbs and immersions
● 13–15 Oct	NH-10 night closures
● Thu 15 Oct	Navi Mumbai demurrage waiver ends
● 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 entry window ends ²
● 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	Monday was Delhi's wettest October day since 2022, with waterlogging at Sainik Farm and Mahipalpur and Ansari Road shut both ways ³ , Gurugram's NH-48 chowks jammed by waterlogging ⁴ , and the Supreme Court march stopping central Delhi ⁵ . More showers are due for three days ³ , so Delhi and Gurugram deliveries run late while Monday's misses catch up.
West ● AMBER	Farmers say they'll block highways at Karad, Satara, Indapur, Parbhani and Nanded, and are already stopping cane trucks in Sangli and Satara ⁶ . Pune–Kolhapur and Pune–Solapur trucks could be held for hours wherever they sit.
South ● AMBER	Karnataka's cane farmers block national highways in every district from 11 am today ⁷ . Kognoli and Hattargi on Pune–Bengaluru are on the list, so trucks crossing north Karnataka could be held for hours.
East ● GREEN	Kolkata's Puja curbs start today: goods vehicles in set hours, port trucks noon to 4 pm, till the 19th ⁸ . That's the usual Puja strain, so deliveries into Kolkata run in those windows, no slower than the season.
Northeast ● AMBER	About 300 trucks of Assam petroleum coke for Visakhapatnam, Haldia, Durgapur, Barauni and Paradip have been held at the Bengal border since 17th September ⁹ ; Sanmarg counts 100-plus, ₹30 crore of goods ¹⁰ . Those plants are four weeks short of coke.
Central ● GREEN	Nothing exceptional to report, beyond seasonal impact.

NETWORK INSIGHTS

1 Navi Mumbai gets Lufthansa, and Friday's bill

Air cargo into and out of Mumbai

● AMBER · HIGH COST OF DELAY · MEDIUM CONFIDENCE

Lufthansa Cargo moved its Mumbai freighters to Navi Mumbai yesterday, joining Cathay Cargo, Silk Way West and Hong Kong Air Cargo there¹¹. The airport says it has handled 11,853 tonnes since January, 55% of it international, and 24 international freighters since August¹². So has the cargo shed caught up? The last report I found is from the 7th: imports sitting on dollies, Challenge Group's freighters suspended, and extra demurrage waived until 15th October¹³. Nobody has reported since whether the dollies cleared, so I am not entirely sure of the impact on import.

From Friday, an import still waiting at Navi Mumbai pays demurrage again. The exposure sits with pharma, electronics and parts importers whose Mumbai air shipments land this fortnight with no slack for a wait of days.

2 Central Railway's busiest month in a decade

Rail freight, Central Railway and the freight corridors

HIGH CONFIDENCE

Central Railway loaded 6.59 million tonnes in September, its biggest month in ten years and 25% more than last September¹⁴. On the dedicated freight corridors, 13,833 trains ran in September, and on 6th October a record 946 trains crossed between the corridors and the main network in one day, beating 929 four days earlier¹⁵. Why does a freight corridor matter in Diwali month? Because its trains don't give way to passenger trains, so they keep to a schedule the main lines can't promise¹⁵. So is the freight corridor like the one empty lane on a jammed highway? Except a record means the lane is filling up, not staying empty.

For full loads between Punjab, Delhi and Bihar, or Delhi and JNPA, a train on the corridor holds its transit time when the highways don't. The catch: the records say others are booking it too, so the slot is the thing to secure, not the rate.

3**Shipping the crude now costs a quarter of the crude**

Crude imports, and the diesel bill

MEDIUM CONFIDENCE

A very large crude carrier from the Gulf to Asia now charges about \$1.3 million a day, 43 times January's rate, and freight has gone from about 3% of the crude's value to about 27%, going by Poten & Partners' figures¹⁶. Tanker shares hit records on Monday, with Brent near \$107¹⁷. India's refiners are already switching: Iraqi crude to India more than doubled in September to 4.41 million tonnes, while Russian crude fell 32%¹⁸. So what does a tanker rate in the Gulf have to do with a truck in Nagpur? Diesel, of course. A refiner paying for the voyage carries it on the crude bill¹⁶. The state pumps haven't moved diesel; Nayara and Jio-bp have added ₹3 a litre¹⁹.

I don't know how long the state retailers keep diesel where it is. Every month they do, the gap with the crude bill grows, and when it closes, every truck rate gets dearer at once; the contract with no diesel clause is the one that eats it.

THE LANES I'M WATCHING

NH-48 Pune-Bengaluru

● AMBER

KOGNOLI, HATTARGI, KARAD, SATARA

Farmers plan to block it at Kognoli toll plaza indefinitely from today, and at Hattargi, Karad and Satara⁶. Kognoli saw about 2,300 heavy trucks a day in August²⁰. Belagavi police detour trucks by Nipani, Chikodi and Gokak²¹, costing hours.

NH-27 at Srirampur

● AMBER

THE NORTHEAST'S ROAD OUT

Bengal's GST officers still hold them, though the Finance Minister said on the 8th a transit state can't; demurrage has reached ₹1 crore⁹. A release promised on the 9th hasn't come¹⁰.

NH-157 Kalinga ghat

● AMBER

GANJAM TO KANDHAMAL, ODISHA

Shut nearly 19 days by a landslide, light vehicles only 10–15 days after repairs; about 42 days last year²². Berhampur–Phulbani trucks detour.

NH-10 Siliguri-Gangtok

● AMBER

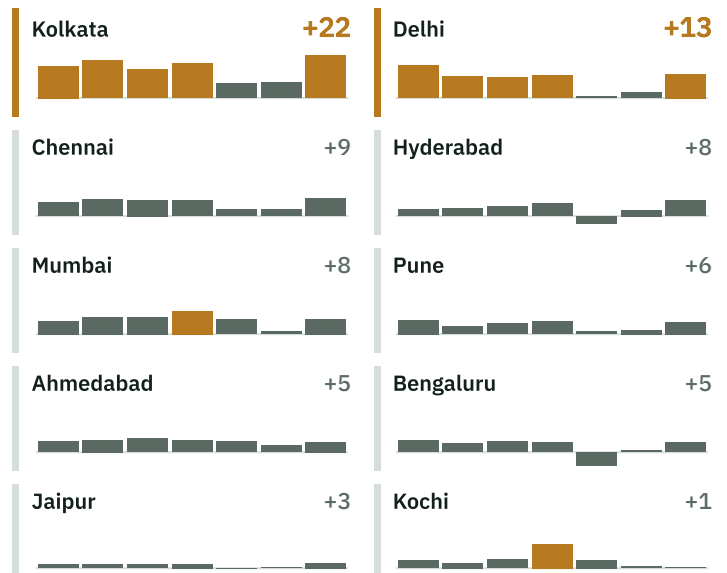
SIKKIM'S ONE TRUNK ROAD

Shut 9 pm–6 am at Sevoke–Rangpo till Thursday and 26th October–5th November²³; late loads wait at Siliguri for morning.

MEASURED THIS MORNING

City roads against usual, daily, 6–12 Oct²⁴ **amber = 10+ over**

Monday was busier than Sunday everywhere but Kochi: Kolkata ran 22 points over usual across the day, the most of the ten cities, and Delhi 13 over, the day of the rain and the march. Kolkata's first curb morning runs a little busier than a weekday: 11 over at 8 am, where weekdays this month ran 5 to 8 and Mahalaya, the last curb day, ran 15, with 15 km of jams, the most at that hour this month. Delhi is 9 over at 8 am, lighter than Monday's 15. Last year's first curb day was 25th September, but TomTom publishes no daily figures for 2025, so there's no like-for-like comparison.



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.

1. Social News XYZ (IANS): cane committee, 12 Oct
2. The Tribune: Delhi's BS-IV entry window to 31 Oct 2026
3. India Today: Delhi's wettest October day since 2022, 13 Oct
4. Millennium Post: Gurugram waterlogged, 13 Oct
5. The Tribune: march stops central Delhi, 13 Oct
6. Times of India: Shetti on the Pune-Bengaluru blockade, 13 Oct
7. Deccan Herald: highway blockade from 11 am, 12 Oct
8. Millennium Post: Kolkata Puja traffic plan, 5 Oct
9. Times of India: Bengal-Assam border logjam, 12 Oct
10. Sanmarg: trucks stuck 24 days at the border, 11 Oct
11. Air Cargo News: Lufthansa winter schedule, 12 Oct
12. Rediff (PTI): Navi Mumbai cargo Jan-Sep, 12 Oct
13. StatTimes: the truth about NMIA's cargo delays, 7 Oct
14. Free Press Journal: Central Railway's September, 12 Oct
15. ITLN: DFC interchange record, 12 Oct
16. Business Upturn: tanker rates (Poten), 12 Oct
17. Mint: tanker stocks at records, 12 Oct
18. BusinessLine: Iraq crude to India, 12 Oct
19. Daily Jagran: Jio-bp raises diesel ₹3, 12 Oct
20. IHMCL: toll plaza data, August 2026
21. Tarun Bharat: Belagavi diversions for the blockade, 13 Oct
22. New Indian Express: Kalinga ghat, 12 Oct
23. ThePrint (PTI): NH-10 night curbs, 5 Oct
24. TomTom Traffic Index, ten cities