

Farmers sleep on NH-48, and the trucks wait

● NETWORK: AMBER

Belagavi's cane farmers spent the night on NH-48 at three toll plazas and say they aren't leaving, so the Pune–Bengaluru highway stays shut to trucks for a second day¹. At Paradip, iron-ore trucks queue 15–20 km for a slot with no room and no ships². And the rate cards have started moving: Blue Dart goes up 9–12% in January³, and smaller carriers aren't waiting that long.

HOW'S EACH REGION HOLDING UP?



DATES TO WATCH

● Wed 14 Oct	Belagavi farmers on NH-48
● 14–24 Oct	Kolkata Puja curbs and immersions
● 14–15 Oct	NH-10 night closures
● Thu 15 Oct	Navi Mumbai demurrage waiver ends ⁴
● 17–24 Oct	Petrapole–Benapole shut to cargo ⁵
● 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 ⁶
● Sun 1 Nov	CMA CGM's new North Europe–India rates
● 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 ran about 20 points over its usual traffic from 7 am to 9 pm yesterday ⁷ , the day after Monday's rain, so the backlog is still working through. Delhi and Gurugram deliveries keep running late until the roads settle.
West ● AMBER	Raju Shetti's farmers sat down at the Kognoli toll plaza on the Maharashtra–Karnataka border yesterday, said they won't leave the highway till the cane price is settled, and Belagavi's administration asked heavy vehicles to stay off it ⁸ . So Kolhapur and Pune loads for the south wait at the border or take the police detours.
South ● RED	The NH-48 blockade in Belagavi held through the night, and farmers blocked NH-50 in Vijayapura too. Around Hubballi, police sent heavy vehicles by Gokul Road and the Tarihal underbridge, and The Hindu says they had a hard time of it ⁹ . So Pune–Bengaluru freight is stopped in Belagavi and slow through Dharwad. In Kerala, 18 Karipur flights to Riyadh and Jeddah were cancelled on Sunday and Monday, stopping more than 30 tonnes a day of fruit and vegetable exports ¹⁰ , so Gulf-bound produce from Kerala and Tamil Nadu waits or sells locally.
East ● AMBER	Paradip handled about 435,000 tonnes yesterday against 474,000 on the same day last year ¹¹ , and India's iron-ore exports fell to 0.7 million tonnes in September, the lowest in almost four years ¹² , so ore trucks for the port wait on the road for days. Kolkata's Puja curbs are the usual strain, so deliveries into the city run in their set hours, no slower than the season ¹³ .
Northeast ● AMBER	Assam's coke trucks are still held at the Bengal border, and The Lallantop reports calcining plants cutting output, leaving aluminium makers such as NALCO, Hindalco and Vedanta, and graphite electrode makers, short of raw material ¹⁴ . So the plants downstream keep running on less until Bengal lets the trucks go.
Central ● GREEN	No delay beyond the season.

NETWORK INSIGHTS

1 Who pays for the festive surcharge?

HIGH CONFIDENCE

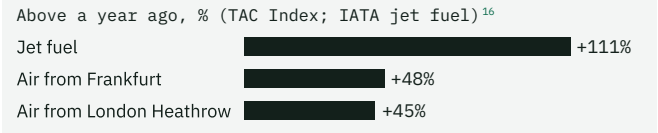
Carriers have started passing their costs on. Blue Dart raises domestic prices 9–12% from 1st January, though a customer who signs up before 31st December is exempt³. Emiza, a Mumbai warehousing firm, has raised prices 10–15% in recent months, citing labour; Zippee is weighing festive surcharges where demand warrants, with its volumes up 4.5 times this season; and Shiprocket says a failed delivery costs ₹40–60 to bring back and ₹15–25 to repack, so a delivered order can cost ₹85–110 in all¹⁵.

The January rise is a line in next year's contract. The returns are paid this month, on every order that doesn't land, and low-ticket D2C brands selling on cash on delivery carry most of it.

2 Europe to India gets dearer by sea and by air

Imports from Europe, sea and air

● AMBER · HIGH COST OF DELAY · MEDIUM CONFIDENCE

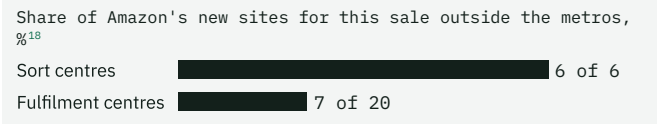


CMA CGM raises its rates from North Europe to India for cargo loaded from 1st November: US\$975 for a 20-foot box to Mundra and US\$900 for a 40-foot, before terminal, peak-season and security charges. Is that a lot? Against its own rate from April, US\$810 and US\$720 to the subcontinent's main ports, it's about a fifth to a quarter more, though April's notice named the region rather than Mundra, so it isn't an exact like-for-like¹⁷. Can a buyer in a hurry switch to air? Well, air is rising too. TAC Index has Frankfurt's outbound air rates 47.7% above last year and London Heathrow's 44.7%, both up again this week on routes that include India, with jet fuel 111.2% dearer than a year ago and India's own outbound space still tight¹⁶. So when both modes go up together, there's no cheaper lane to move the urgent load to.

Factories that run on European parts, machines and chemicals are at risk of impact: a November box costs more by sea, and pulling it forward by air costs more still. A landed-cost budget set before this month is the one that eats it.

3 Amazon's new sort centres skip the metros

MEDIUM CONFIDENCE



Amazon says it has added 20 fulfilment centres, six sort centres and about 150 delivery stations for this sale, with storage up 50% to 64 million cubic feet; seven of the new fulfilment centres and all six sort centres are outside the metros, and Amazon Now went from 60 cities to more than 120 in two weeks¹⁸. Why does it matter where a sort centre sits? Because a parcel sorted in a big metro hub picks up that hub's queues, and this week a Pune load for Bengaluru is sitting on NH-48. Where there is no fulfilment centre nearby, Amazon says it moves stock closer by rail and air¹⁸. Whether the new sites are actually fully staffed in sale weeks is yet to be seen.

For sellers on the marketplace, a small-town order now has a shorter path that skips more of the shared metro hubs. A brand shipping on its own carrier still goes through those hubs, and its parcels are the ones held when a highway shuts.

THE LANES I'M WATCHING

NH-48 Pune–Bengaluru

● RED

HATTARAGI, HIREBAGEWADI, KOGNOLI

Farmers cooked and slept on the road at all three toll points overnight, with kilometres of goods vehicles standing¹; on Tuesday every heavy vehicle was stopped¹⁹. They say they stay till the price is met, so trucks between Pune and Bengaluru wait in the queue or don't set out.

NH-50 Solapur–Chitradurga

● AMBER

YALAGAR CROSS, VIJAYAPURA

Farmers blocked it at Yalagar Cross on Tuesday, with the Vijayapura–Kalaburagi road at Sindagi and the Vijayapura–Athani road at Tikota, and say the blockades go on until the governments respond²⁰. Trucks between Solapur and Hubballi can be held wherever a blockade sits.

NH-53 Paradip–Chandikhole

● AMBER

ODISHA'S ORE ROAD TO THE PORT

The New Indian Express reports thousands of iron-ore trucks stranded since 1st October, queued 15–20 km towards Bhutmundai and Marshaghai, because JSW's plot at the port is full and its ships haven't come². Other freight on the road to Paradip runs slow past the queue.

NH-27 at Srirampur

● AMBER

THE NORTHEAST'S ROAD OUT

More than 300 trucks of Assam coke, held since 17th September with their GST papers complete; transporters pay ₹4 lakh to ₹5 lakh a day in detention, over ₹1 crore so far¹⁴.

NH-157 Kalinga ghat

● AMBER

GANJAM TO KANDHAMAL, ODISHA

Shut nearly 20 days, several buses have stopped running, and light vehicles get through only 10–15 days after repairs finish²¹. Berhampur–Phulbani trucks take the long way round.

NH-10 Siliguri–Gangtok

● AMBER

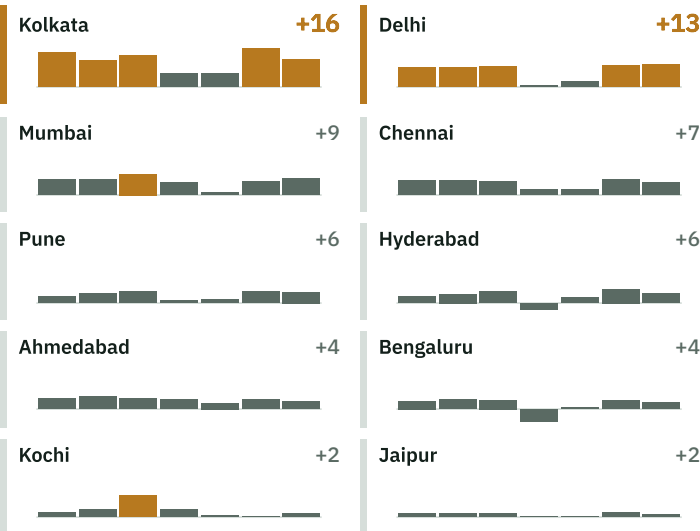
SIKKIM'S ONE TRUNK ROAD

Sevoke–Rangpo night closures end tomorrow and return from 26th October to 5th November²²; till then, late loads wait at Siliguri for morning.

MEASURED THIS MORNING

City roads against usual, daily, 7–13 Oct⁷ **amber** = 10+ over

Over the whole of yesterday Kolkata ran 16 points over usual and Delhi 13; counting only 7 am to 9 pm, it's about 23 and 20, the two busiest of the ten cities. Bengaluru ran just 5 over, so the NH-48 blockade isn't on the city's own roads; it's the trucks bound for the city that wait. From 8 am to 1 pm today Kolkata is running 16 over, Mumbai 15 and Delhi 13.



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. TV9 Kannada: overnight sit-in on NH-48, 14 Oct
2. New Indian Express: truckers' stir at Paradip, 13 Oct
3. News Karnataka: Blue Dart's January price rise, 1 Oct
4. STAT Times: Navi Mumbai's demurrage waiver, 6 Oct
5. Maritime Gateway: Petrapole–Benapole cargo halt, 13 Oct
6. The Tribune: Delhi's BS-IV entry window to 31 Oct 2026
7. TomTom Traffic Index, ten cities
8. ETV Bharat (Marathi): Shetti at Kognoli, 13 Oct
9. The Hindu: Dharwad, Haveri and Gadag blockades, 13 Oct
10. Mathrubhumi: Karipur exports to Saudi halted, 13 Oct
11. Paradip Port daily traffic, 13 Oct
12. GMK Center (BigMint): iron-ore exports in September, 13 Oct
13. Millennium Post: Kolkata Puja traffic plan, 5 Oct
14. The Lallantop: 300 trucks at the Bengal border, 13 Oct
15. Mint: rising costs for logistics firms, 14 Oct
16. STAT Times: TAC Index air rates, 13 Oct
17. Maritime Gateway: CMA CGM North Europe–India rates, 13 Oct
18. Storyboard18: Amazon's festive network, 13 Oct
19. The Hindu: Pune–Bengaluru highway blocked, 13 Oct
20. Deccan Chronicle: blockades across Karnataka, 13 Oct
21. OdishaBytes: Kalinga ghat shut 20 days, 13 Oct
22. ThePrint (PTI): NH-10 night curbs, 5 Oct