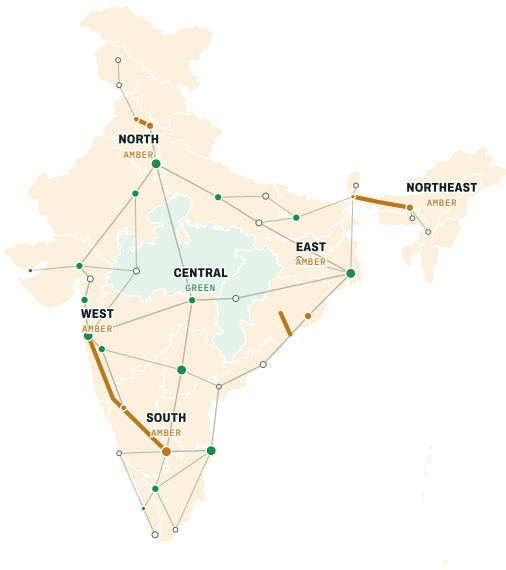


More late parcels, and a queue at Kandla

● NETWORK: AMBER

A week into the sales, about one Amazon app review in ten mentions a delivery problem¹. On the trade side, about 70 ships are waiting for a berth at Kandla, twice the line the port usually carries². And IndiGo has stopped flying to all four big Saudi airports until 24th October, and Akasa and Air India have cut theirs too³.

HOW'S EACH REGION HOLDING UP?



Map: DataMeet, CC BY 4.0

DATES TO WATCH

● 16–17 Oct	Cane farmers march, Belagavi to Hubballi ⁴
● 16–24 Oct	Kolkata Puja curbs and immersions ⁵
● 16–24 Oct	IndiGo's Saudi flights cancelled
● 17–24 Oct	Petrapole–Benapole shut to cargo ⁶
● 26–27 Oct	Kolkata Puja curbs and immersions ⁵ , again
● 26 Oct–5 Nov	NH-10 night closures ⁷
● Sat 31 Oct	Delhi's BS-IV entry window ends ⁸
● Sun 1 Nov	CMA CGM's new North Europe–India rates ⁹
● 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
○	a hub not rated today

North ● AMBER	Thursday's bandh shut NH-44 at Ludhiana for the whole working day, and the road is open again this morning. I'd expect Ludhiana's hubs to take a day's held loads on top of today's, and Punjab deliveries to run a day late into the weekend.
West ● AMBER	ET Infra reports about 70 ships waiting at Kandla, some for 25 days, against a usual line of 30 to 35 ² . The port will load rice at an oil jetty to shorten it, and charterers pay \$15,000 to \$20,000 a day meanwhile. Near Sangli, Raju Shetti asked four cooperative mills to stop crushing from Thursday midnight, though cut cane can still go in ¹⁰ . I'd expect rice and other bulk exports bound for Kandla to sit in trucks and yards for weeks, not days.
South ● AMBER	Hubballi is where the cane march is heading, so I'd expect Pune–Bengaluru loads to keep running a few hours behind into Sunday. The northeast monsoon set in on Thursday, with yellow alerts across south Andhra to the 19th ¹¹ : the usual strain for October, with no delay beyond the season.
East ● AMBER	Kolkata ran about 20 points over its usual traffic before dawn ¹² , the Puja's usual strain under the police's curbs ⁵ . Petrapole takes no cargo for Bangladesh from Saturday to the 24th ⁶ , so I'd expect export trucks that reach Bongaon after Friday night to wait the week out. Kalinga ghat stays shut.
Northeast ● AMBER	Nobody has reported the coke trucks at the Bengal border moving since Tuesday, so I'm treating them as still held. I'd expect Assam's refinery coke to keep missing the calciners that use it for at least another week.
Central ● GREEN	Nagpur and Raipur run as the sale season normally does, with no delay beyond the season.

NETWORK INSIGHTS

1 A week in, the complaints start

MEDIUM CONFIDENCE

App reviews mentioning a delivery problem, %, 12-14 Oct (1-7 Oct in brackets)

Amazon ██████████ 10.1% (6.5%)

Flipkart ████████ 2.1% (1.3%)

On 12th to 14th October about one Amazon app review in ten mentioned a delivery problem, against one in fifteen in the first week of the month; Flipkart's share went from about 1% to 2%¹. Google searches for Ekart's customer care, Flipkart's own carrier, rose about 40% from Saturday to Thursday, while Blue Dart, Delhivery and DTDC held level¹³. Where is the load going? ClickPost counted 200 D2C brands' first four sale days: shipments up 31%, and the smallest towns taking 45% of them, up 34% on last year¹⁴. So I'd expect the strain to land on small-town last mile next week, with the first returns from these orders on the same trucks.

Brands selling online carry the late small-town parcels, and the cash-on-delivery orders among them are the ones most likely to come back. Carriers and 3PLs carry the extra runs into towns where a second attempt costs as much as the first.

2 Exports up a quarter, and JNPA's yard fills

Containers through Nhava Sheva

● AMBER · HIGH COST OF DELAY · HIGH CONFIDENCE

JNPA import boxes waiting, TEU, 15 Oct (10 Oct in brackets)

At freight stations (CFS) ██████████ 13,960 (10,236)

At inland depots (ICD) ██████ 2,890 (1,715)

September's goods exports rose 23% on a year ago to \$44.4 billion, led by electronics, petroleum products and engineering goods, while imports reached \$74.6 billion¹⁵. Goods and services together made July to September the best second quarter for exports on record¹⁵. At JNPA the yard went from 56% to 65% full in five days, and import boxes waiting for a freight station rose from about 10,200 to 14,000¹⁶. Is the gate the problem? Actually, no: trucks still turn round in about an hour and a half¹⁶, and the bit that's growing is the boxes waiting to leave. I'd expect import boxes to sit a day or two longer at the freight stations next week if the line keeps growing.

Manufacturers and importers bringing festive stock through Nhava Sheva are the exposed ones: a box that waits two extra days at a freight station reaches the warehouse after the Diwali window it was bought for.

3 Now Jeddah and Dammam are off too

Air cargo from Indian airports to Saudi Arabia

● AMBER · HIGH COST OF DELAY · HIGH CONFIDENCE

Earlier this week, with Riyadh shut, some IndiGo, Akasa and Air India flights from Kochi and Kozhikode kept flying to Jeddah and Dammam¹⁷. That was the way round. IndiGo has now cancelled every flight to Riyadh, Jeddah, Dammam and Madinah until 24th October, and Akasa has stopped Riyadh to the 24th and Jeddah to the 21st³.

Exporters of Kerala fruit and vegetables and makers sending urgent parts to Saudi Arabia lose the belly space on Indian airlines for nine more days. What still goes has to find a freighter or another Gulf hub, with one more handling on the way.

4 Will diesel go up in November?

MEDIUM CONFIDENCE

Pump-price rise, % (Oxford Economics)

May, all the rises together ██████████ 7.5%

Oxford's guess for November ██████ about 3.75%

Oxford Economics thinks November is the last realistic window for a pump-price rise before campaigning starts for next year's state elections¹⁸. Its guess is about half of May's 7.5% rise¹⁸, so close to 4%. Mint's report of the same note says that would take retail inflation to 6.2% this quarter, above the RBI's ceiling¹⁹. It's one economist's call, mind you, and the government hasn't said a word.

Carriers and fleet owners would pay a rise at the pump the day it lands. Brands and manufacturers with a monthly fuel clause in their freight contracts get it a month later, in the December reset, just after the Diwali peak.

THE LANES I'M WATCHING

NH-44 Ludhiana-Rajpura

● AMBER

SAHNEWAL AND DORAHA

Bandh protesters held the GT Road and its service lanes from 9 am to the evening, with queues of 5 to 6 km both ways²⁰. I'd expect the backlog through Ludhiana to clear by Saturday evening.

NH-48 Belagavi-Hubballi

● AMBER

THE CANE FARMERS' MARCH

The farmers walked 25 km from Hattargi to Belagavi's Suvarna Vidhana Soudha on Thursday and set off for Hubballi this morning⁴. I'd expect a slow lane behind them for hours at a time, today and tomorrow.

NH-27 at Srirampur

THE NORTHEAST'S ROAD OUT

● AMBER

The latest count, from Tuesday, was more than 300 trucks of Assam petroleum coke refused entry by Bengal, their GST papers in order²¹. I'd expect them to stay held through next week, with the detention bill growing every day.

NH-157 Kalinga ghat

GANJAM TO KANDHAMAL, ODISHA

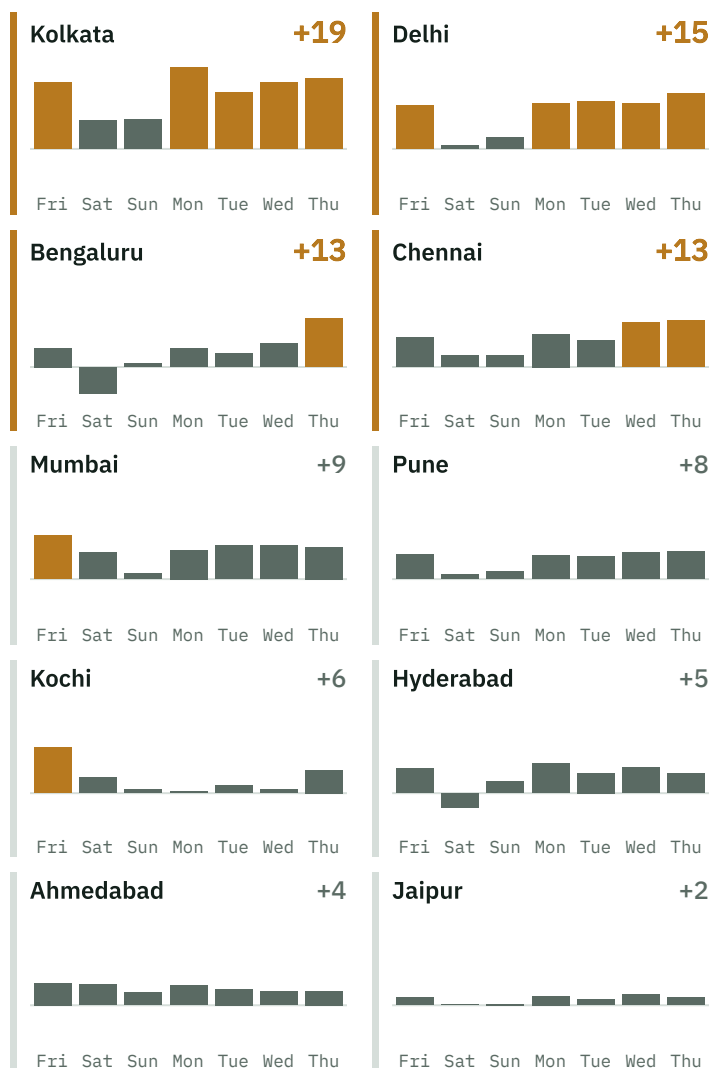
● AMBER

Repairs keep the ghat shut for 20 days from Tuesday's report²². I'd expect Berhampur–Phulbani trucks to keep taking the long way, hours longer each way, into the first days of November.

CITY TRAFFIC UPDATES

City roads against usual, daily, 9–15 Oct¹² **amber = 10+ over**

Kolkata, Delhi, Bengaluru and Chennai stand out: 10+ points over usual on 15 Oct, Kolkata on 5 of the last 7 days, Delhi on 5, Bengaluru on 1 and Chennai on 2.

**HOW THIS IS MADE**

At 7 every morning, Claude drafts this page on its own using data available from public sources only. It reads the morning's public signals: city traffic in ten cities, the JNPA and Paradip port reports, ship queues at the container ports, toll-plaza truck counts, the seasonal calendar and about twenty news searches.

Then it writes, and a set of checks decides whether the draft is even fit for me to read. Every claim has to be opened and cited, and no source can be over a week old without a reason. No story from the last seven days comes back unless it actually moved, and nothing gets said twice.

I read it, argue with it, fix what's wrong and approve it. 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. Does that make the page right? Not always, which is why the calls get scored.

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