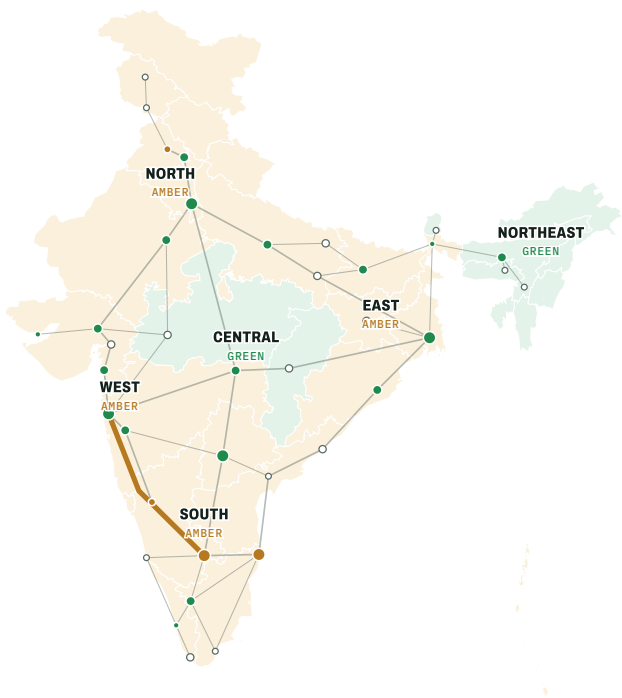


Fewer cash orders, and a wet weekend in Chennai

● NETWORK: AMBER

For the first time, more than half of the sale's D2C parcels were paid for upfront, by ClickPost's count of 200 brands¹. In the south, six Tamil Nadu districts are under an orange alert today, and Friday's rain already held up traffic on GST Road. And at Kandla the line of ships has grown to 72², because dearer Gulf container rates have pushed rice onto ships that need its dry-cargo berths³.

HOW'S EACH REGION HOLDING UP?



Map: DataMeet, CC BY 4.0

DATES TO WATCH

● Sat 17 Oct	Orange alert in six Tamil Nadu districts
● 17–20 Oct	Cane march into Hubballi; rally on the 20th
● 17–24 Oct	Kolkata Puja curbs and immersions ⁴
● 17–24 Oct	Petrapole–Benapole shut to cargo
● 17–20 Oct	Air India's Saudi flights cancelled ⁵
● 17–24 Oct	IndiGo's Saudi flights cancelled ⁶
● 26–27 Oct	Kolkata Puja curbs and immersions ⁴ , 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 Punjab bandh is over, but a hub takes about two days to work off a day of held loads. I'd expect Ludhiana's hubs to finish clearing them tonight, and Punjab deliveries to be back on time by Monday.
West ● AMBER	Kandla's queue of ships is the West's one trouble beyond the season. I'd expect bulk export trucks bound for the port to keep waiting in Gandhidham's yards all next week. Mumbai and Pune carry the sale's usual strain, with no delay beyond the season.
South ● AMBER	Six Tamil Nadu districts, Tiruvallur and Kancheepuram among them, are under an orange alert today, and a rain cave-in near Kancheepuram stopped trains on Friday ¹⁰ . I'd expect Chennai deliveries to slip half a day today and tomorrow, on top of the cane march's drag on NH-48.
East ● AMBER	Petrapole's eight-day cargo halt starts today. I'd expect Kolkata's exporters to hold Bangladesh loads in their own godowns until the border reopens on the 25th.
Northeast ● GREEN	No delay beyond the season.
Central ● GREEN	Nothing beyond the sale's usual load at Nagpur or Raipur this morning, so no delay beyond the season.

NETWORK INSIGHTS

1 More paid upfront, fewer coming back?

MEDIUM CONFIDENCE

Prepaid share of D2C festive shipments, first four sale days, % (ClickPost)

2026	52%
2025	46%

Prepaid passed half of D2C festive shipments for the first time, ClickPost reports: 52% across 200 brands in the sale's first four days, against 46% last year¹. Prepaid grew 47% and cash on delivery 27%. The late parcels haven't eased: 21 of 222 Amazon app reviews on 15th October named a delivery problem, still about one in ten, and Flipkart's share has nearly tripled since early October¹¹. Why does that matter on a truck? Well, a cash order can be refused at the door, and then it rides all the way back. Madurai showed the extreme this week, when a creator's followers sent him cash orders he never placed, TVs and fridges included, and Amazon and Flipkart agents kept turning up¹². My guess is the first refusals from the sale's opening week reach return hubs from Monday, fewer for every thousand parcels than last Diwali.

Brands selling online gain most: every cash order that becomes a prepaid one is a return trip they don't pay for. Carriers and 3PLs still carry the refusals that remain, and in a small town a failed attempt costs as much as a delivery.

2 Dearer boxes to the Gulf, and 72 ships at Kandla

Bulk and bagged exports through Kandla

● AMBER · HIGH COST OF DELAY · HIGH CONFIDENCE

Ships waiting at Kandla's anchorage (IPA)

30 Sep	56
7 Oct	69
16 Oct	72

Kandla had 72 ships waiting at anchorage on Friday, 50 of them ready to berth, from 56 on 30th September². Why the jump? The chairman told Maritime Gateway that dearer container rates to the Middle East moved rice exporters onto conventional ships, which need Kandla's dry-cargo berths, and some now wait 20 to 25 days³. So the Gulf's container problem has turned into a berth problem in Gujarat. And those rates have no reason to ease: BBC Verify counted 12 ships attacked around Hormuz in the week to 11th October, a weekly record¹³. I'd expect the line to stay above 60 ships into November.

Manufacturers and exporters shipping bulk or bagged cargo through Kandla carry the wait: a contract priced on last month's freight loses money with every day at anchor. Carriers serving the port lose trucks to yard queues just as the sale needs them inland.

3 Will the cane mills start on time?

MEDIUM CONFIDENCE

Maharashtra sugar mills before the talks failed (RuralVoice)

Crushing	14
Ready to start	40

Maharashtra's mills brought crushing forward to 8th October because the cane was drying out, but after the Delhi talks failed, the ones that hadn't started put it off, RuralVoice reports¹⁴. Raju Shetti's farmers, from Kolhapur and Sangli to Belagavi and Bagalkot, now want every mill stopped until their demands are met, with a big rally in Hubballi on Tuesday¹⁴. Will it end quickly? The gap is wide: the Centre's fair price for cane this season is ₹3,650 a tonne, and Karnataka's growers want ₹5,500¹⁵. Even in a normal year, a Mandya grower told the same paper, the mills don't always take the cane on time, and a crop meant for 12 months stands for 14 or 15¹⁵. Why does a mill's start date matter to freight? It's two flows, actually: cane into the mills by truck and tractor, and sugar out of them in the weeks before Diwali. My guess is a late start squeezes the season's cane haulage into fewer weeks from November, crowding the roads around Kolhapur and Belagavi.

Manufacturers who buy sugar for sweets, drinks and biscuits face thinner mill dispatches before Diwali if the stop holds past Tuesday. Carriers and 3PLs that haul for the mills lose a fortnight's work now and get it back all at once later.

THE LANES I'M WATCHING

NH-48 Belagavi-Hubballi

● AMBER

THE CANE MARCH, TOWARDS KITTUR

Farmers walked on from Belagavi towards Kittur on Friday; their leader says they'll reach Hubballi within two days and expects half a million people¹⁶. They say they'll go home if the Centre promises to meet their demands¹⁷. Hattargi's toll plaza counted about 2,300 heavy trucks a day last October¹⁸, so a march at walking pace holds up a lot of freight. I'd expect Pune-Bengaluru trucks to crawl behind the march today and tomorrow, and Hubballi's hub to run half a day late into Monday.

NH-112 Bongaon-Petrapole

● AMBER

THE LAND BORDER TO BANGLADESH

Petrapole takes no cargo from today to the 21st, and Benapole on the Bangladesh side stays shut from the 20th to the 24th, so trade restarts on the 25th¹⁹. Benapole reckons 300 to 350 truckloads a day come in from India, so the halt holds back something like 2,400 to 2,800 loads, industrial raw materials among them¹⁹. I'd expect trucks that reach Bongaon anyway to wait out the eight days there, with detention on every one, and the whole backlog to try to cross in the week from the 25th.

GST Road into Chennai

● AMBER

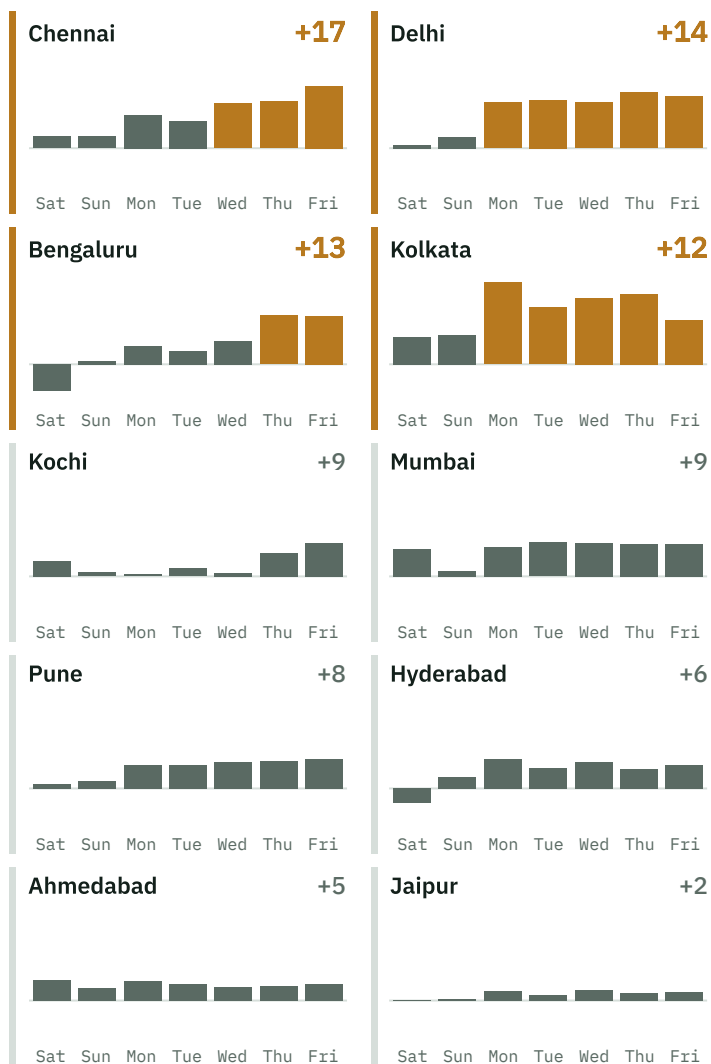
RAIN ON THE CITY'S SOUTHERN WAY IN

Waterlogging held up traffic on GST Road, at Maduravoyal and Poonamallee and at the Porur toll plaza on Friday, and heavy rain is likely in Chennai again today¹⁰. Paratur's toll plaza, on GST Road near Chengalpattu, counted about 4,000 heavy trucks a day last October¹⁸. I'd expect trucks for Chennai's hubs to lose a few hours a trip on these stretches today and tomorrow.

CITY TRAFFIC UPDATES

City roads against usual, daily, 10–16 Oct²⁰ **amber** = 10+ over

Chennai climbed all week, from 12 points over usual on Wednesday to 17 on Friday, the day the monsoon's first heavy rain waterlogged some of its main roads. Delhi held at 13 to 15 over. Kolkata eased to 12 over on Friday, then ran up to 38 over before dawn this morning, the Puja's Saptami. Bengaluru jumped from 7 over on Wednesday to 13 on Thursday and Friday. Mumbai, Pune, Hyderabad, Ahmedabad, Kochi and Jaipur stayed under 10 over all week, the sale's ordinary load.



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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