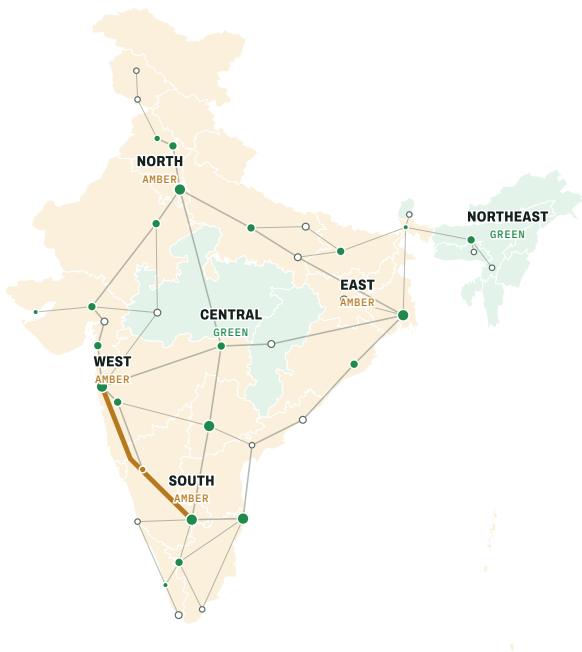


The east orders fastest, and import boxes wait at JNPA

● NETWORK: AMBER

The sale's parcels to East India grew about four times as fast as the national average in its first four days, by ClickPost's figures¹. At JNPA, import boxes waiting to go inland by rail rose by 60% in five days. And in Haryana, paddy the agencies have bought is piling up in the mandis for want of lifting.

HOW'S EACH REGION HOLDING UP?



Map: DataMeet, CC BY 4.0

DATES TO WATCH

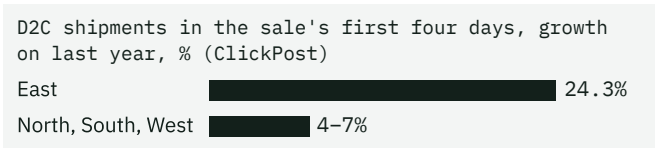
● 18–19 Oct	Empty Indian trucks may cross back from Benapole
● 18–20 Oct	Cane march into Hubballi; rally on the 20th ²
● 18–19 Oct	Kolkata Puja curbs on goods vehicles
● 18–24 Oct	Petrapole–Benapole shut to cargo
● 18–24 Oct	Air India and IndiGo Saudi flights cancelled ^{3,4}
● 20–24 Oct	Kolkata immersion bans on goods vehicles
● 26–27 Oct	Kolkata immersion bans, second round
● 26 Oct–5 Nov	NH-10 night closures ⁵
● Sat 31 Oct	Delhi's BS-IV entry window ends ⁶
● Sun 1 Nov	CMA CGM's new North Europe–India rates ⁷
● 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	Bought paddy is piling up in Haryana's mandis: only 37% of it lifted in Panchkula and 42% in Yamunanagar, by district figures ^{8,9} . Farmers blocked a highway at Ambala over it on Saturday. The pile itself is the harvest's usual strain. So why would a mandi worry anyone else? Well, lifting is trucks, and I'd expect local trucks round Ambala and Karnal to get scarcer and dearer once the agencies push to clear, late this month.
West ● AMBER	Punjab's basmati exporters are moving Gulf cargo off containers and onto bulk ships, at \$75 to \$100 a tonne, to dodge dear box rates and port delays, TOI reports ¹⁰ . That's more bagged rice for the conventional berths at Kandla, where the anchorage is already full ¹¹ . My guess is Punjab's new-crop rice reaches the port faster than those berths can load it from next week, and bulk exporters' ships wait longer into November.
South ● AMBER	Cane farmers turned down the Chief Minister's offer of talks within a week, so the march walks on towards Hubballi ¹² . I'd expect Hubballi's and Bengaluru's hubs to take Pune loads half a day late until Tuesday's rally is over.
East ● AMBER	Petrapole stays shut to cargo till the 25th, and Kolkata's immersion bans on goods vehicles begin on Tuesday. I'd expect Kolkata loads to wait longer for a truck until about the 25th, as the ones coming back empty from the border sit out the bans.
Northeast ● GREEN	Police stopped a planned 72-hour blockade of NH-8 into Tripura before it began on Saturday, so trucks into the state ran on time and the railway stayed clear ¹³ .
Central ● GREEN	Central India's hubs run on time, carrying only what the season always brings.

NETWORK INSIGHTS

1 The sale runs east, into the immersions

MEDIUM CONFIDENCE



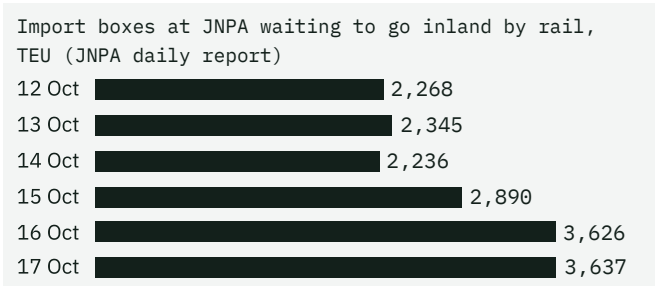
Parcels to East India grew fastest in the sale's opening days: 24.3% over last year across ClickPost's 200 D2C brands, against 4 to 7% in the north, south and west¹. ET Now, which carried the data, notes that one sale window can't prove a trend. Fair enough, but the parcels are on the road now, and they're heading into a shutdown. Kolkata Police bar goods vehicles from the city for the immersions, 20th to 24th October¹⁴. And buyers are chasing them already: searches for Ekart's customer care hit their highest of the week on Saturday, by Google Trends¹⁵. My guess is eastern parcels pile up in the hubs on Kolkata's edge from Tuesday, and the Bengal towns get them in the last week of October.

Brands selling online with a big eastern following carry the risk: a parcel that misses the bans lands after the buyer's Puja, when a refusal is likelier. Carriers and 3PLs with hubs round Kolkata hold five days of eastern parcels they can't send on.

2 Import boxes are piling up behind JNPA

Imports from JNPA to inland depots

● AMBER · HIGH COST OF DELAY · HIGH CONFIDENCE

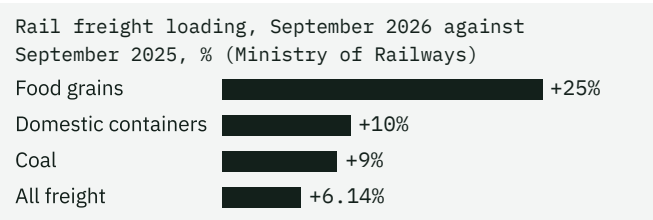


Import boxes waiting at JNPA to go inland by rail rose to 3,637 TEU in the port's 17th October report, from 2,268 on 12th October^{16,17}. The same reports show the pile for the container freight stations round the port growing too, from 10,650 to 15,875 TEU. Is the port itself stuck? Not really: on the 17th the yard was 64% full and trucks were in and out in under two hours. So the jam is behind the quay, in getting boxes away to the inland depots, and the long Dasara weekend comes next. My estimate is that an import box for a northern depot that lands this week reaches it two to three days later than one did a fortnight ago.

Manufacturers waiting on imported parts and raw materials at inland depots carry the delay, and a stopped line costs more than any demurrage. Carriers and 3PLs moving boxes off the port face longer queues at the freight stations before they get shorter.

3 The trains took the grain and the boxes

HIGH CONFIDENCE



Indian Railways loaded 135.35 million tonnes in September, 6.14% more than a year earlier and faster than the half-year's 4.1%, by the ministry's figures¹⁸. The growth sits in two flows road freight competes for: food grains up 25% and domestic containers up 10%^{18,19}. Coal to power stations rose to 443 rakes a day from 397, Maritime Gateway adds¹⁹. Why does a rail figure matter to a road network? Well, every rake of grain or boxes is a long-haul load no truck had to carry before the sale. It may also be why JNPA's rail-bound boxes are queueing: the trains are busy. My guess is that rail keeps the long trunk lanes' truck rates soft through October, while the short hauls round the ports stay tight.

Manufacturers who moved festive stock by rail in September have it in place before the sale's second wave, at a lower cost per tonne. Carriers and 3PLs selling long-haul trucks face rail competing harder for the same container loads.

THE LANES I'M WATCHING

NH-48 Belagavi–Hubballi

● AMBER

THE CANE MARCH, NOW AT KITTUR

The march walked into Channamma Kittur on Saturday, keeping to one side of NH-48, and the Chief Minister came to address it there²⁰. The farmers mean to go on to Hubballi and surround Union minister Pralhad Joshi's house²⁰. Hattargi's toll plaza, behind them, counted about 2,700 heavy trucks a day in August²¹, and October isn't this road's busiest month, so it has room to catch up once the walkers pass. I'd expect Pune–Bengaluru trucks to crawl behind the walkers between Kittur and Dharwad today and tomorrow, and Hubballi's hub to run late on Tuesday, rally day.

Ambala–Hisar highway

● AMBER

PADDY FARMERS OUTSIDE AMBALA'S GRAIN MARKET

Farmers sat on the highway outside Ambala's New Grain Market on Saturday, wanting the cap of 26.26 quintals an acre lifted and bought paddy moved promptly, and police sent traffic round²². They refused to clear the road when officials asked, and no report yet says when it ended²². I'd expect trucks between Ambala and Kaithal to take the long way round while it lasts, and paddy loads for the mills to lose a day.

NH-112 Bongaon–Petrapole

● AMBER

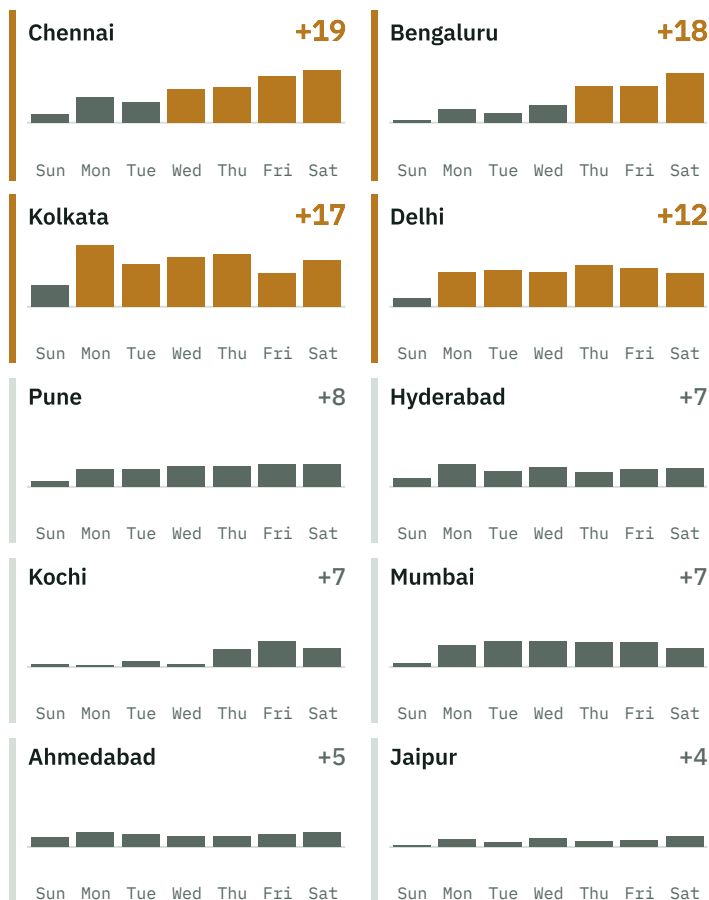
THE LAND BORDER TO BANGLADESH

Benapole keeps loading, unloading and clearing goods already at the port today and tomorrow, though trade across the border stays halted from the 17th to the 24th, a Jashore paper reported on Saturday²³. About 500 trucks cross on a normal day, so the eight days hold back some 4,000 loads²⁴. I'd expect the returning trucks to wait at Bongaon or Kolkata's edge through the immersion bans, and the backlog to try to cross in the week from the 25th.

CITY TRAFFIC UPDATES

City roads against usual, daily, 11–17 Oct²⁵ **amber = 10+ over**

Chennai and Bengaluru ran hottest on Saturday, 19 and 18 over usual. Chennai had its first heavy rain in 25 days on the 16th and 17th, and water stood on roads across the city²⁶. Bengaluru's roads flooded in Thursday evening's downpour²⁷, then the Dasara exodus held travellers up to six hours on the Mysuru, Tumakuru and Hosur roads on Friday night²⁸. Kolkata ran 12 to 22 over in Puja week, with roads round the big pandals closed¹⁴. After a crush at a north Kolkata pandal killed 18 on Saturday evening, police asked the biggest pujas to stop letting visitors in²⁹. Delhi held 12 to 15 over; the police blame Ramlila and Puja crowds for crawling evenings in East Delhi till the 20th³⁰.

**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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