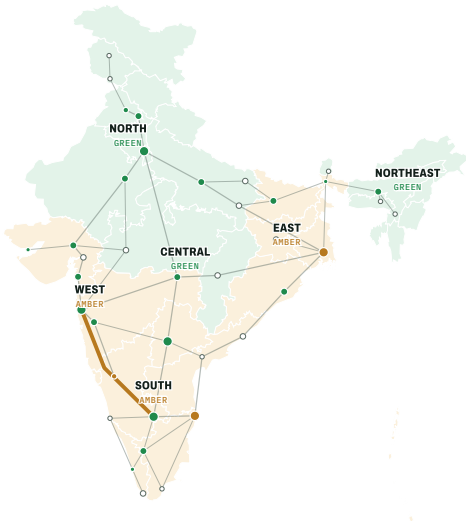


Why is the sale shipping fewer parcels this year?

● NETWORK: AMBER

The sale's first ten days shipped 10 to 12% fewer parcels than last year's, executives told The Economic Times¹, which may be the first good news for a stretched network. Chennai is wading through the northeast monsoon's first big downpour, with more forecast till Wednesday. And Tamil Nadu has stopped random tax checks on trucks, a rule other states may well copy.

HOW'S EACH REGION HOLDING UP?



Map: DataMeet, CC BY 4.0

DATES TO WATCH

● Mon 19 Oct	Kolkata Puja curbs on goods vehicles
● 19–21 Oct	Very heavy rain likely in Tamil Nadu
● 19–24 Oct	Petrapole–Benapole shut to cargo
● 19–24 Oct	Air India and IndiGo Saudi flights cancelled
● 20–24 Oct	Kolkata immersion bans on goods vehicles
● 23–29 Oct	Low likely over the southeast Bay (IMD outlook)
● 26–27 Oct	Kolkata immersion bans, second round
● 26 Oct–5 Nov	NH-10 night closures
● Sat 31 Oct	Delhi's BS-IV entry window ends
● 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 ● GREEN	The north's trucks are running to the season's pattern, paddy loads and festive stock, with no delay beyond the season. Delhi's own deadline for older trucks is the week's decision, not a delay yet.
West ● AMBER	JNPA's pile of import boxes waiting for trains barely moved over the weekend, 3,601 TEU on the 18th against 3,637 the day before, while trucks cleared the gate in about 1.6 hours ^{2,3} . So the port itself is fine. I'd expect inland depots in the north to keep getting their import boxes late all this week, since a pile that size takes days of extra trains to clear.
South ● AMBER	Parrys in north Chennai logged 36 cm of rain in the 24 hours to Sunday morning, and IMD expects very heavy rain in Tamil Nadu till Wednesday and heavy rain till Saturday ⁴ . The northeast monsoon is the season, of course, but not usually this hard in its first week. The cane march still walks the road into Dharwad. I'd expect Chennai's deliveries to lose a day in the flooded north of the city through Wednesday, and Hubballi's hub to run late until the march stops.
East ● AMBER	I'd expect the hubs on the city's edge to hold Kolkata's parcels from Tuesday to Saturday, and doorsteps to get them in one rush from the 25th, the same day Petrapole's queue tries to cross.
Northeast ● GREEN	The Northeast's roads and gateways run as the season does, so loads through Siliguri and Guwahati see no delay beyond the season.
Central ● GREEN	Nagpur and the central hubs carry their usual festive load, on time.

DECISIONS FOR THE WEEK AHEAD, 19–25 OCT

1	Kolkata bars goods vehicles from the city's roads for the immersions from 20th to 24th October, and again on the 26th and 27th ⁵ . A load still outside the city tomorrow morning waits most of a week for its buyer, so today is the last ordinary day to send it in. Which Kolkata-bound loads go into the city before the bans start on 20th October (Tuesday)?
2	Gurugram's traffic police said on the 16th that BS-IV and older goods vehicles, small ones included, lose entry to Delhi from 1st November ⁶ . No extension has come, and the fortnight before Diwali is the worst time to go looking for BS-VI, CNG or electric trucks, so I'd treat the date as final. Which of your Delhi runs still use BS-IV trucks, and are their replacements contracted this week?
3	The sale's first ten days shipped fewer parcels than last year's, by the platforms' and carriers' own account, while ClickPost's D2C brands shipped more. Sort shifts and trucks hired for a bigger peak cost the same whether the parcels come or not, and the Diwali run-up is the one chance left to fill them. How much of the extra sort and linehaul hired for the peak do you keep for the Diwali weeks, and do you settle it with clients this week?
4	Petrapole–Benapole stays shut to cargo from the 17th to the 24th ⁷ , so a week of India–Bangladesh trade arrives at the gate together when it opens. The first days after a long shutdown go to whoever already has a truck parked at Bongaon. Which Bangladesh-bound loads must cross first, and are their trucks at Bongaon before the border reopens on 25th October (Sunday)?

NETWORK INSIGHTS

1 Fewer phone and appliance boxes, more small parcels

MEDIUM CONFIDENCE

Dispatches in the sales' first ten days ran 10 to 12% below last year, brands, platforms and carriers told The Economic Times, blaming phones and appliances up 30 to 40% in price¹. ClickPost's figures point the other way, with D2C brands shipping more than last year in every region⁸. Can both be true? Yes, if fewer big electronics boxes ship and more small D2C parcels do. If so, the parcels the hubs are missing are the heavy, high-value ones, the boxes that take two people at the door. Nobody has published a full count, and the platforms haven't said, so I'd treat both figures as early reads. Buyers chasing their parcels eased too, with searches for Ekart's customer care down to 29 on Sunday from Saturday's week high of 35, on Google Trends' scale of 100⁹. So I'd expect a quieter week at the hubs, and the real test in the Diwali run-up from next week.

Carriers and 3PLs that hired and leased for a bigger peak carry the cost of the gap, since a sorter paid for and idle costs as much as a busy one. Brands selling online that bought phones and appliances at the new prices risk holding them past Diwali. Quick commerce, selling small and fast, looks the least exposed of the four.

2 Food checks push festive sweets into cold trucks

MEDIUM CONFIDENCE

FSSAI has told food businesses to make, store, sell and move perishables such as khoya, paneer, meat and fish under temperature control, with seizure and destruction for those who don't, The New Indian Express reports¹⁰. The advisory, dated the 15th, rests on licence conditions from 2011 and asks the states' food safety officers and Indian Railways to check consignments in transit¹⁰. So the rule isn't new, but the checking is. Delhi has already begun: its food safety department found temperature norms broken at several e-commerce and quick-commerce warehouses and dark stores, and 19 of 59 market ghee samples unsafe, All India Radio reported on Sunday¹¹. A lot of festive khoya and paneer travels in ordinary covered trucks and train parcel vans, and the sweets season peaks before Diwali, exactly when a seized load hurts most. My guess is refrigerated vans get harder to book, and cost more, over the next fortnight, as sweet makers and dairies move what they can into them. Is there that much spare cold capacity? Nobody publishes a count, so I can't say.

Quick commerce and food brands selling dairy and sweets carry the exposure, because a seized load is a lost Diwali sale, not a late one. Carriers and 3PLs with refrigerated fleets hold the scarce trucks, and can price them that way.

3 Fewer roadside tax stops, starting with Tamil Nadu

HIGH CONFIDENCE

Tamil Nadu's new flying squads stop goods vehicles only on intelligence and a senior officer's written order, The Economic Times reported this morning, with the Centre's detailed directions still awaited¹². The state's circular of the 14th ended random checks by roving squads, and needs a Joint Commissioner's sign-off before any stop¹³. It follows the GST Council's proposal on the 8th that states trucks only pass through stop routine checks of those carrying e-way bills¹⁴. A truck held at a check misses its slot at the next hub, and the Bengal-Assam border standoff showed how long a hold can run. Will the big transit states follow? I'd expect so, within weeks of those directions coming out.

Carriers and 3PLs on long interstate lanes gain hours a trip wherever states adopt it, because a truck crossing three states faces fewer random stops on the way. Manufacturers moving high-value goods through transit states carry less risk of a load held for paperwork.

4 Exports to Africa and Southeast Asia keep port roads busy

Export boxes from Indian ports to Africa and Southeast Asia

● GREEN · HIGH COST OF DELAY · HIGH CONFIDENCE

India's exports to Africa rose 47% to \$26.19 billion in April to August, and to ASEAN 56% to \$23.08 billion, by the commerce ministry's figures, Business Standard reports¹⁵. Shipments to West Asia are climbing back, from \$4.2 billion in April to \$5.01 billion in August, but still short of January's \$6.48 billion before the war, Mint adds¹⁶. So the extra export loads should keep port-bound trucks busy through the festive weeks, when the same roads carry the sale.

Manufacturers and exporters selling to Africa and Southeast Asia carry the cost of a missed sailing, which on thinner routes can mean a week's wait for the next ship.

THE LANES I'M WATCHING

NH-48 Belagavi-Hubballi

● AMBER

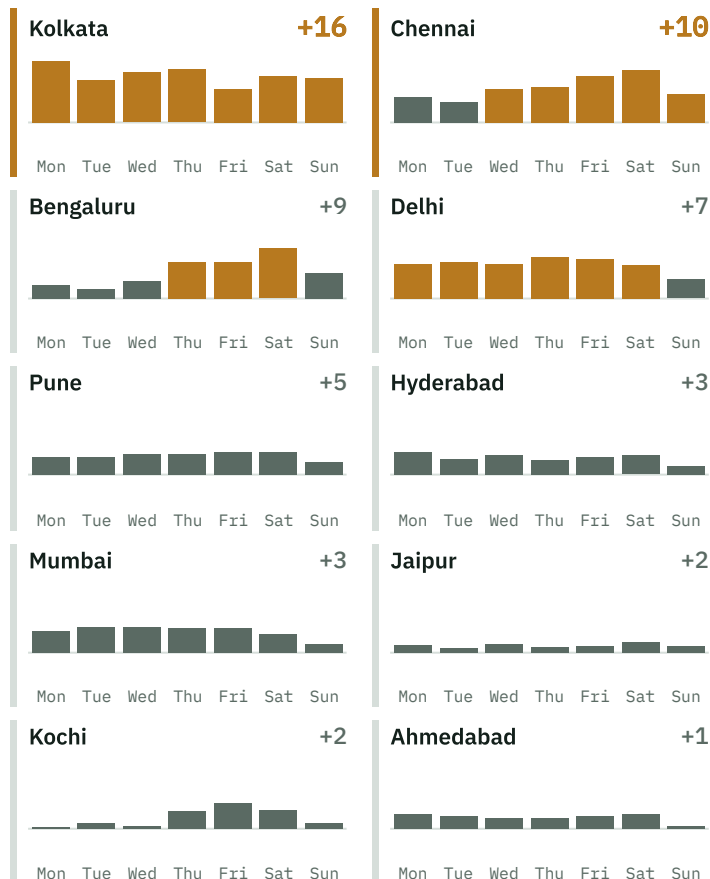
THE CANE MARCH, NOW NEAR DHARWAD

The march left Kittur and reached Guledakoppa, near Dharwad, on Sunday, its fifth day¹⁷. The High Court has barred a protest outside Union minister Pralhad Joshi's house, and the leaders were weighing a pause till the 22nd for Dasara, undecided by Sunday evening¹⁷. With about 2,700 heavy trucks a day through the Hattargi plaza in August¹⁸, and October a quieter month on this road, a few slow hours clear within the day. I'd expect Pune-Bengaluru trucks to run an hour or two slower round Dharwad today and tomorrow, and on time if the pause is called.

CITY TRAFFIC UPDATES

City roads against usual, daily, 12–18 Oct¹⁹ **amber = 10+ over**

Kolkata ran hot all week, with roads round the big pandals closed⁵. Chennai peaked on Saturday under 36 cm of rain at Parrys⁴, and Bengaluru the same day, after the Dasara exodus jammed its highways²⁰. Delhi's evenings crawled round the Ramlila and Puja grounds²¹.



CALLS I'LL CHECK NEXT WEEK

1. Kolkata's roads run 10 or more points over usual on at least three of the five immersion days, 20th–24th October¹⁹.
2. IMD reports a low over the southeast Bay of Bengal by 26th October (Monday)²².
3. JNPA's import boxes waiting for trains are still above 3,000 TEU in its report of 25th October².

HOW MY CALLS HAVE DONE

Of the 5 calls scored so far, 4 came true, 1 partly and none was wrong. 1 is still open. From 12 Oct:

1. The state retailers hold diesel prices through 19th October, while Jio-bp's and Nayara's stay ₹3 a litre higher. **Right**. No change reported at the state pumps; Nayara and Jio-bp charge ₹3 more. [Source](#)
2. Delhi's BS-IV exemption has not been extended by 19th October. **Right**. Gurugram police confirmed the 1 November cut-off on the 16th. [Source](#)

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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