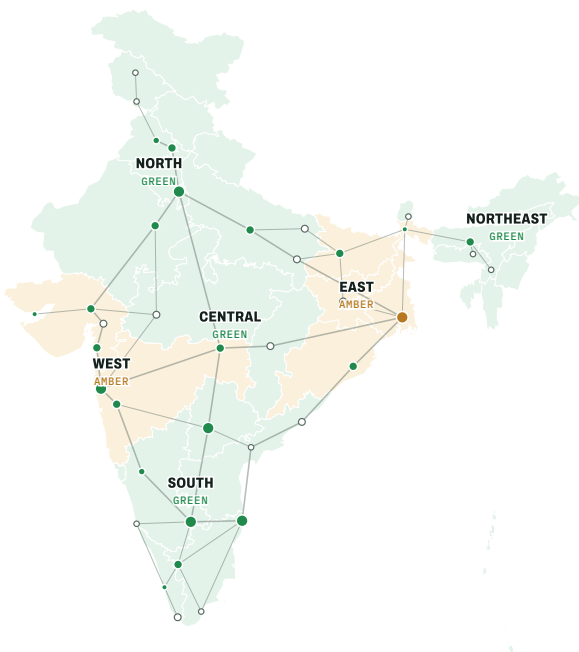


Diwali stock moves into dark stores, and Kolkata's immersions begin

● NETWORK: AMBER

Brands are moving their Diwali stock out of central warehouses and into dark stores and local hubs, which puts this year's peak on the riders more than on the sorters. Kolkata's immersion bans start today, and JNPA's pile of import boxes waiting for trains grew by a fifth in a day. Shipping a box to India now costs more than twice what it did in February.

HOW'S EACH REGION HOLDING UP?



Map: DataMeet, CC BY 4.0

DATES TO WATCH

● 20–24 Oct	Kolkata immersion bans on goods vehicles
● 20–21 Oct	Very heavy rain possible in Tamil Nadu
● 20–22 Oct	NH-202 Imphal–Ukhrul shut
● 20–24 Oct	Petrapole–Benapole shut to cargo
● 20–24 Oct	Air India and IndiGo Saudi flights cancelled
● 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
● Sun 1 Nov	Ethanol year starts without sugar-based ethanol

- 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

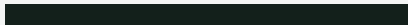
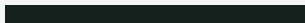
North ● GREEN	The north's hubs and roads carry the festive load the way the season does, so loads there see no delay beyond the season. Delhi's last day for BS-IV trucks, 31st October, sits in the dates to watch.
West ● AMBER	JNPA's import boxes waiting for inland trains rose to 4,379 TEU in the report of the 19th, from 3,601 a day earlier, even as the yard eased to 59% full ^{1,2} . Trucks still leave the gate in about an hour and a half ¹ , so the hold-up, it seems, is on the rail side. My guess is that a box landing this week waits two or three extra days for its train to Delhi or Nagpur.
South ● GREEN	The cane farmers called off their march near Dharwad on Monday evening and gave the Centre till 26th November, so trucks round Hubballi run on time again ³ . Tamil Nadu's heaviest rain moved inland, 18 cm at Periyanaickenpalayam near Coimbatore, with very heavy rain still possible till Wednesday ⁴ . That's the northeast monsoon's usual strain, of course, with no delay beyond the season.
East ● AMBER	The Puja's curbs give way to the immersion bans today, and those keep trucks out of Kolkata through Saturday and on two days next week ⁵ . I'd expect a week of Kolkata's parcels to reach doorsteps together from Sunday, so deliveries in the city run two or three days late into next week, with another pause on the 26th.
Northeast ● GREEN	Only Ukhrul's road, NH-202, is shut, and the gateways at Siliguri and Guwahati run as the season does, so the rest of the region's loads see no delay beyond the season.
Central ● GREEN	Guna in west Madhya Pradesh had 12 cm of rain in a day, but IMD sees no significant weather in central India this week ⁴ , so Nagpur's hubs see no delay beyond the season.

NETWORK INSIGHTS

1 Brands move Diwali stock into dark stores

MEDIUM CONFIDENCE

India's smartphone shipments, July to September, million (Omdia)

2025  about 48.4
 2026  35.8 (–26%)

Brands are holding more Diwali stock in dark stores and local hubs this year, and less in central warehouses, ET Retail reports. Wonderchef has doubled its quick-commerce stock and expects two and a half to three times last year's festive volumes there, and Shadowfax says brands and marketplaces have set up more temporary warehouses than last year⁶. Shadowfax expects peak days to run 50 to 60% over normal, and its riders to grow by a fifth to a third for the season. Here's the catch: sale orders and quick-commerce orders now draw on the same riders⁶. Phones, the big festive boxes, are thinner, with Omdia counting India's July to September smartphone shipments down 26% to 35.8 million, the lowest third quarter since 2016⁷. So where does the strain go? From the sorters to the last mile. I'd expect it to bite in the metros' rider pool in the ten days before Diwali on 8th November.

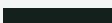
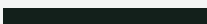
Quick commerce and brands selling online gain speed, but their stock now sits in many more places, and a city that buys less than planned leaves it stuck in the wrong dark store. Carriers and 3PLs that share riders between sale and quick-commerce orders face their tightest fortnight of the year before Diwali.

2 Container freight costs twice February's rate

Import and export boxes through India's ports

● AMBER · HIGH COST OF DELAY · MEDIUM CONFIDENCE

Global container freight rate, \$ a box (Jefferies, via KNN India)

February 2026  \$2,000–2,500
 October 2026  \$4,000–4,500 (+130%)

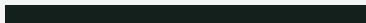
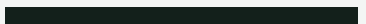
A container now costs about \$4,000 to \$4,500 to ship, against \$2,000 to \$2,500 in February, a rise of 130% that Jefferies puts down to the Middle East, KNN India reports⁸. The Economic Times carries the same Jefferies figures⁹. The boxes haven't stopped coming, mind you: India's container trade by value rose 23% on last year in September, and cargo at the major ports 13%⁸. So the bill rises on every box, and the volume holds. What would bring rates down? Jefferies is watching whether the lines go back to the Suez Canal⁹. I'd expect the bill to show first on boxes through JNPA and Mundra, the gateways for the Gulf and Europe routes.

Manufacturers and exporters on contracts priced before February lose money on every sailing until they reprice. Brands selling online that import their stock pay it in landed cost, just before Diwali, when there is no time left to change supplier.

3 Ethanol tankers move from sugar mills to grain plants

MEDIUM CONFIDENCE

Oil companies' price for maize ethanol, ₹ a litre (The Hindu)

2025-26  ₹71.86
 2026-27 tender  ₹68.86

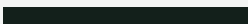
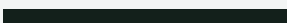
The oil companies' ethanol tender for the year from November seeks about 11 billion litres and leaves out ethanol made from cane juice, sugar syrup and B-heavy molasses, Mint reports¹⁰. It takes maize, broken rice, FCI's surplus rice and C-heavy molasses instead, and cuts the price for maize ethanol to ₹68.86 a litre from ₹71.86, The Hindu adds¹¹. The aim is to keep the cane as sugar, with acreage down and poor rain in Maharashtra and Karnataka¹¹. Will the tankers follow the feedstock? I'd expect so: fewer tankers out of the sugar belt's distilleries from November, more out of grain plants, and more trucks of maize and FCI rice running to them. The mills keep more sugar to sell, which means more sugar bags on the road and rail.

Carriers and 3PLs running tankers out of the sugar belt lose loads to fleets near the grain distilleries, and their tankers wait longer for a return load. Manufacturers who buy sugar in bulk, food and drinks makers above all, may find supply steadier, since the mills have more of it to sell.

4 Factories hire 100,000 temporary hands, loaders among them

MEDIUM CONFIDENCE

Temporary factory jobs in the festive season (CIEL HR Services, for The Economic Times)

2025  about 85,000
 2026  about 100,000 (+18%)

About 100,000 temporary factory jobs are likely this festive season, about 18% more than last year's 85,000, by CIEL HR Services' study for The Economic Times¹². Quess says its open factory postings run about 71% above last September's. The roles factories want include picker-packers, loaders and unloaders, dispatch staff and forklift drivers, Adecco India told the paper¹². Those are the same hands a carrier's hub hires for the peak. Eight industrial states, Gujarat, Maharashtra, Uttar Pradesh, Telangana, Tamil Nadu, Jharkhand, Karnataka and Andhra Pradesh, took about 94% of Quess' offers in September. So I'd expect loaders in those states' warehouse belts to cost more, and turn up less reliably, through the Diwali weeks.

Carriers and 3PLs bid for the same loaders as the factories, so a peak shift costs more, and a hub short of hands holds trucks at the dock. Manufacturers scaling up dispatch for the festive run meet the same cost at their own loading bays.

THE LANES I'M WATCHING

NH-202 Imphal-Ukhrul

● AMBER

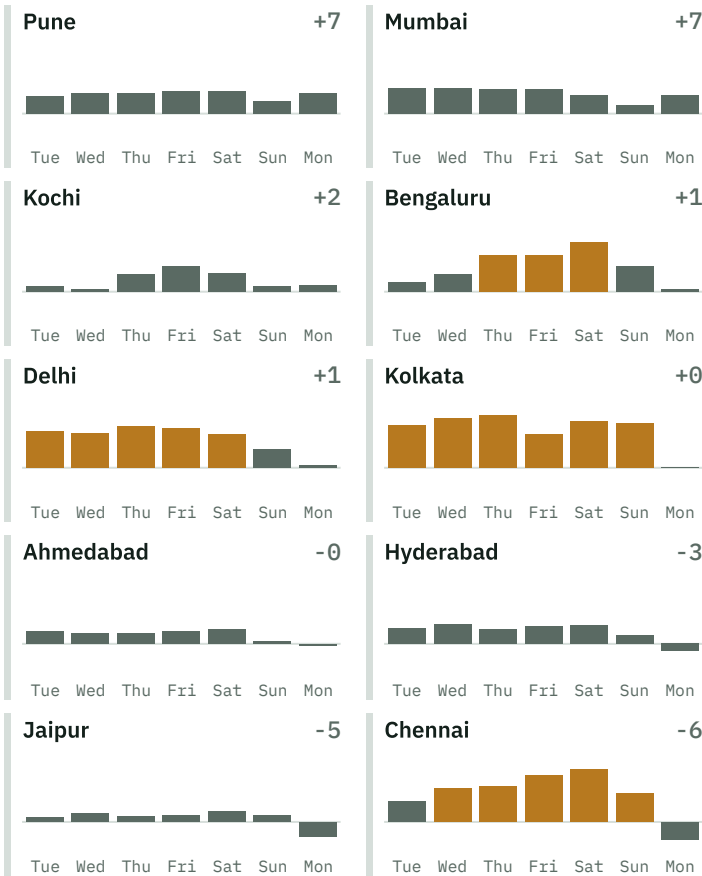
A SHUTDOWN CALLED AFTER A KILLING IN KAMJONG

A Kuki group has called a total shutdown of NH-202, which links Imphal with Ukhrul, from Sunday midnight to Thursday midnight, The New Indian Express reports¹³. The same group shut the road for two weeks in July and August¹³. I'd expect loads for Ukhrul to wait in Imphal till Friday, and its shops and doorsteps to get them from the weekend.

CITY TRAFFIC UPDATES

City roads against usual, daily, 13–19 Oct¹⁴ **amber = 10+ over**

Saturday the 17th was the week's worst day for three cities: Chennai after a night of extremely heavy rain¹⁵, Bengaluru as Dasara travellers jammed the highways out¹⁶, and Kolkata at the height of the Puja, with roads round the pandals shut⁵. Delhi ran over usual that day too, after its traffic police warned of evening delays near the Ramlila and Puja grounds¹⁷.



HOW MY CALLS HAVE DONE

Of the 5 calls scored so far, 4 came true, 1 partly and none was wrong. 4 are 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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SOURCES

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5. Millennium Post: Kolkata Puja traffic plan, 5 Oct
6. ET Retail: festive supply chains go hyperlocal as brands move stock closer to buyers, 19 Oct
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12. Economic Times (CIEL HR): festive demand to fire up temporary factory hiring, 19 Oct
13. New Indian Express: Naga SP moved out a day after Kuki civilian's killing; NH-202 shutdown to 22 Oct, 19 Oct
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17. Business Today: Delhi Traffic Police warn of evening delays near Ramlila and Puja venues till 20 Oct, 17 Oct