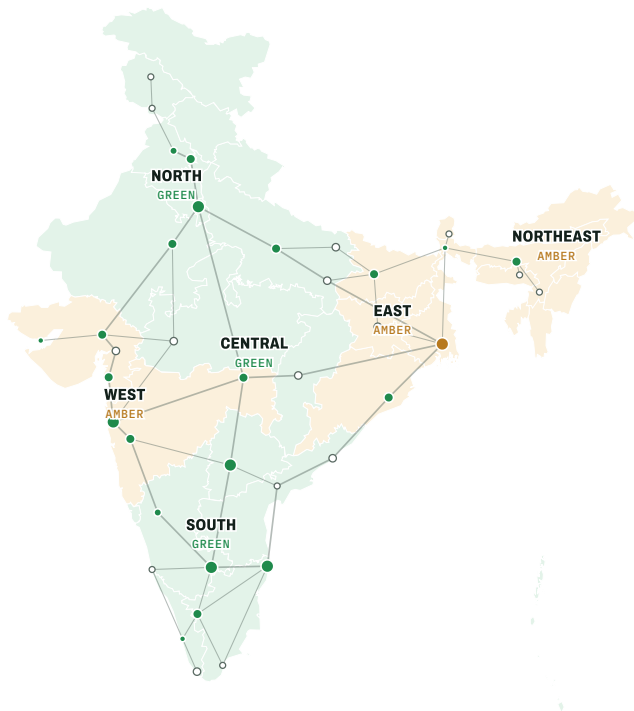


Quick commerce misses the festive lift, and mills await coal

● NETWORK: AMBER

The festive sale has barely touched quick commerce yet, even as Flipkart's daily users hit a record, so the Diwali stock in dark stores sits and waits. Coal trains are going to power plants first, and newsprint makers say theirs arrive late and in bunches. JNPA's queue for inland trains is nearly twice what it was a week ago.

HOW'S EACH REGION HOLDING UP?



Map: DataMeet, CC BY 4.0

DATES TO WATCH

● 21–24 Oct	Kolkata immersion bans on goods vehicles
● 21–22 Oct	NH-202 Imphal–Ukhrul shut
● 21–23 Oct	NH-85 Adimali–Munnar shut
● 21–24 Oct	Petrapole–Benapole shut to cargo
● 21–24 Oct	Air India and IndiGo Saudi flights cancelled
● 21–26 Oct	Heavy rain in Tamil Nadu
● Fri 23 Oct	Farmers plan to block the Bengaluru–Mysuru highway
● Fri 23 Oct	Second low likely over the southeast Bay
● 26–27 Oct	Kolkata immersion bans, second round
● 26 Oct–5 Nov	NH-10 night closures
● Sun 1 Nov	Delhi keeps out non-BS-VI vehicles from outside
● 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

Delhi's winter plan, announced on Tuesday, keeps vehicles registered outside the city out unless they meet BS-VI, from 1st November to the end of February¹. Pumps will also refuse fuel to any vehicle without a pollution certificate. I'd expect older trucks to be moved off Delhi runs before then; for now the north sees no delay beyond the season.

West

● AMBER

At JNPA the queue for trains hasn't moved: 4,349 TEU in the report of the 20th, nearly twice the 2,236 of the 14th, while the yard filled back to 66%^{2,3}. Its rail report puts a train's time at the port this month at about 11 hours, against an 8-hour target⁴. I'd expect a box landing this week to reach its inland depot three or four days late, so factories that live on rail-borne imports get them into next week.

South

● GREEN

IMD expects a low to form off the Tamil Nadu coast within a day, with very heavy rain possible in the state to the 22nd and heavy rain to the 26th⁵. That's the northeast monsoon's October, and Chennai's roads ran close to usual this morning, so there's no delay beyond the season yet.

East

● AMBER

From 10 pm to 1 am on Tuesday night Kolkata's roads ran 27 to 38 points over usual, TomTom's hourly figures show⁶, with the goods-vehicle bans for the immersions still in force⁷. I'd expect loads for the city to stand at the hubs on its edge till Sunday morning, and the backlog to clear by the middle of next week.

Northeast

● AMBER

Manipur's valley districts went into a 48-hour shutdown on Tuesday over the killing of three villagers, with public transport off and markets shut, NE Now reports⁸. Kangpokpi, on the Dimapur road into Imphal, is under a total shutdown till midnight tonight⁹. A convoy of 136 supply trucks still left Jiribam for Imphal⁸. I'd expect other loads for Imphal to wait at Dimapur and Jiribam and arrive a day or two late, from Thursday.

Central

● GREEN

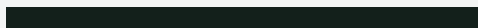
Nothing beyond the season touches the centre this week, so Nagpur and Bhopal see no delay beyond the season.

NETWORK INSIGHTS

1 Quick commerce sees little festive lift in the sale's first week

MEDIUM CONFIDENCE

Daily users in the sale's first six days, change on September (BoFA, from Sensor Tower)

Myntra  +40%
Blinkit  +3%

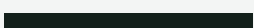
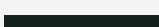
Quick commerce got little festive lift in the sale's first six days, The Economic Times reports from BoFA's reading of Sensor Tower data: Blinkit's daily users rose 3% over September and Zepto's fell 2%¹⁰. The sale apps did far better, with Flipkart's daily users at a record on its opening day and Myntra's up 40%¹⁰. So what happens to the stock brands pushed into dark stores this month? It waits, it seems. I'd expect quick commerce to peak close to the festival itself, not in a sale window, with its rush in the last few days before Diwali on 8th November. Flipkart's deliveries hold up: 3 of its 206 Play Store reviews on the 20th complained¹¹.

Brands selling online that moved Diwali stock into dark stores pay to hold it two weeks longer than the sale calendar suggests. Quick commerce, and the carriers and 3PLs whose riders work for it, face the whole festive rush in the last few days before Diwali, with no time to move stock between cities.

2 Maharashtra's cane crush starts in Solapur and Marathwada, and stalls in the west

MEDIUM CONFIDENCE

Maharashtra's sugar mills, 2026-27 season, to 19 October (Sarkarnama)

Applied for a licence  212
Licensed  131
Crushing  more than 50

More than 50 of Maharashtra's sugar mills have started crushing, in Ahilyanagar, Solapur and Marathwada, while the Swabhimani farmers' agitation holds up mills in western Maharashtra, Sakal's Sarkarnama reports¹². The state had licensed 131 of the 212 mills that applied by Monday¹². And the cutters? About 500,000 of them have stopped work over wages, ChiniMandi reports from Lokmat¹³. I'd expect the hired tractors and trucks to run in Marathwada and Solapur from this week, while the west starts late, its peak haul in the Diwali weeks.

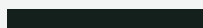
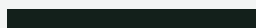
Carriers and 3PLs that hire out trucks to the mills earn later in the west, and those trucks then compete for drivers with the Diwali peak. Food and drinks makers counting on new-season sugar from western Maharashtra may get it later than planned.

3 Power plants get the coal trains, and paper mills wait for theirs

Coal by rail to factories outside the power sector

● AMBER · HIGH COST OF DELAY · MEDIUM CONFIDENCE

Share of coal going to power plants, % (Indian Newsprint Manufacturers' Association, via The Hindu)

Cabinet committee's split  75%
Now, by the association  over 95%

Newsprint makers have asked the Prime Minister to step in because their coal trains from Coal India's fields aren't arriving on schedule, and then turn up several at once, The Hindu reports¹⁴. The mills hold long-term contracts with Coal India, mind you. Yet their association says more than 95% of the coal is going to power plants, against the 75:25 split between power and other industry that a Cabinet committee recommended¹⁴. Why? The power plants are short: 81 of the 176 that run on domestic coal are at critical stock, Outlook India reports¹⁵. So the trains go to the plants first, and the mills buy coal on the open market at steep prices and run on grid power¹⁵. I'd expect other factories that burn Coal India's coal, cement and sponge iron among them, to feel the same squeeze until the plants' stocks recover this winter. Will more of their coal come by truck from the fields of Jharkhand, Chhattisgarh and Singrauli? I think so, at road rates.

Manufacturers that burn coal, paper, cement and metals above all, pay open-market prices and may run below capacity into the winter. A mill that gets four trains in one week also has to find the space and trucks to unload them. Carriers and 3PLs with trucks in the coal belt can expect more loads of open-market coal, at road rates.

4 Crude's freight to India's west coast is six times its pre-war rate

Crude by sea into India's west-coast refineries, diesel out to the trucks

● AMBER · HIGH COST OF DELAY · MEDIUM CONFIDENCE

Shipping crude from inside the Gulf to India's west coast now costs about \$16 a barrel before war-risk insurance, against \$2.50 just before the war, analyst Natalia Katona estimates, ABP Live reports¹⁶. Refiners are selling more diesel abroad meanwhile, 596,000 barrels a day in September against a 2026 average of 482,000, by Kpler's data in Business Standard¹⁷. I'd expect the oil companies' case for raising diesel, the fuel every truck burns, to grow each week the freight holds, and any rise at the pump to reach truck rates within days.

Carriers and 3PLs on fixed festive rates carry any diesel rise until they reprice, while those with fuel clauses pass it on. Manufacturers moving bulk by road would pay it within a billing cycle, and brands selling online as a fuel surcharge on every parcel.

THE LANES I'M WATCHING

NH-85 Adimali–Munnar

● AMBER

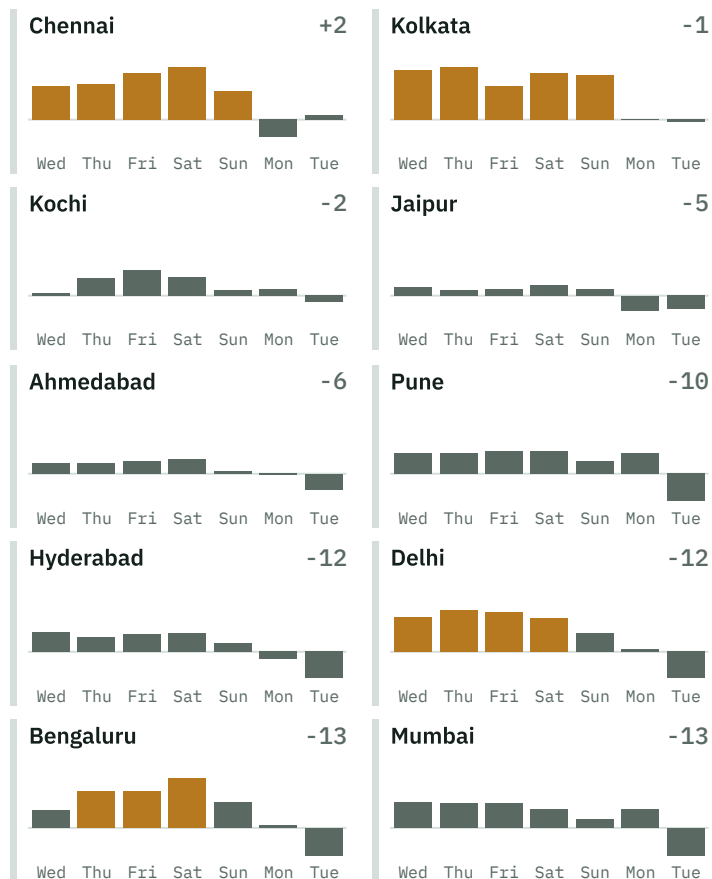
SHUT FOR THREE DAYS AFTER A BOULDER FALL

A boulder fell on the road at Randaam Mile on Monday night during highway work, and Idukki's collector has stopped all traffic till the slope is made safe, Mathrubhumi reports¹⁸. Traffic goes round via Anachal and Iruttukanam, and I'd expect loads into Munnar to take that longer hill road at least till Friday.

CITY TRAFFIC UPDATES

City roads against usual, daily, 14–20 Oct⁶ amber = 10+ over

Kolkata ran well over usual through the Puja, with roads round the pandals closed under the police plan⁷, and Chennai through the heavy rain of the 16th to 18th¹⁹. Bengaluru did as the Dasara crowd drove out of town²⁰, and Delhi in the evenings round the Ramlila and Puja grounds, as its traffic police had warned²¹.



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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