

REVISITING LOGISTICS POLICY ACROSS THE STATES IN INDIA

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requirements for the award of the degree of*

MASTER OF PLANNING (TRANSPORT PLANNING AND LOGISTICS MANAGEMENT)

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Declaration

I **Akash Udebhan Sapate**, Scholar No. **2022MTPLM014** hereby declare that the thesis titled “**Revisiting Logistic Policy across the States in India**” submitted by me in partial fulfilment for the award of **Master of Planning**, at School of Planning and Architecture, Bhopal, India, is a record of bonafide work carried out by me. The matter/result embodied in this thesis has not been submitted to any other University or Institute for the award of any degree or diploma.

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This is to certify that the declaration of **Akash Udebhan Sapate** is true to the best of my knowledge and that the student has worked under my guidance in preparing this thesis.

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I Feel very glad to present to you my final year thesis
“Revisiting Logistics Policy Across the States in india”

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List of Abbreviations

B20 Conference: Business 20 Conference

CLAP: Comprehensive Logistics Action Plan

DFC: Dedicated Freight Corridor

DGFT: Directorate General of Foreign Trade

DMIC: Delhi Mumbai Industrial Corridor

ELOG: Ease of Logistics

EXIM: Export-Import

EPP: Enterprise Promotion Policy FSI: Floor Space Index

GST: Goods and Services Tax

HSIIDC: Haryana State Industrial and Infrastructure Development Corporation

ICDs: Inland Container Depots

IDS: Integrated Digital Systems

INR: Indian Rupees

LEADS: Logistics Ease Across Different States

LPI: Logistics Performance Index

MIDC: Maharashtra Industrial Development Corporation

MMLPs: Multimodal Logistics Parks

MMLAI: Measures to Make Logistics an Industry

MoRTH: Ministry of Road Transport and Highways

RFID: Radio-Frequency Identification

SIG: System Improvement Group

TEUs: Twenty-Foot Equivalent Units

TRIFAC: Trade and Investment Facilitation Corporation

ULIP: Unified Logistics Interface Platform

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Abstract

The thesis titled “**Revisiting the Logistics Policy in Different States of India**” provides an in-depth analysis of the logistics park policies implemented across various states in India. It explores the evolution of these policies, their current status, and their impact on the logistics sector. It focuses on case study of states like **Punjab** and **Gujarat**, which have introduced significant policies such as the **Integrated Logistics & Logistics Park Policy 2023** and the **Integrated Logistics and Logistics Park Policy 2021** respectively. These policies aim to **enhance warehousing services, material handling, packaging facilities, and transport facilities**. It further delves into the effectiveness of these policies in reducing freight costs and time, cutting warehousing costs, reducing vehicular pollution and congestion, and improving the tracking and traceability of consignments. It also discusses the challenges faced in implementing these policies and provides recommendations for future policy-making. It explores that while these policies have made significant strides in improving logistics infrastructure, there is a need for continuous review and revision to ensure they remain relevant and effective in the ever-evolving logistics sector. The research underscores the importance of these policies in enhancing India’s logistics infrastructure and making it more efficient and cost-effective. It also highlights the government’s commitment to improving the logistics sector, which is considered the **backbone of economic growth**. It is evident that continuous efforts are required to ensure that these policies are effectively implemented and deliver the desired results. The thesis will provide valuable insights for policymakers, industry stakeholders, and researchers interested in India’s logistics sector.

Key words - *Logistics Policy India, Integrated Logistics and Logistics Park Policy, Material handling, Packaging facilities, Transport facilities, Freight costs, Warehousing costs, Vehicular pollution and congestion, Supply chain management, Policy-making, Logistics infrastructure, Economic growth.*

सार

"भारत के विभिन्न राज्यों में लॉजिस्टिक्स नीति का पुनरीक्षण" शीर्षक वाली थीसिस भारत के विभिन्न राज्यों में लागू लॉजिस्टिक्स पार्क नीतियों का गहन विश्लेषण प्रदान करती है। यह इन नीतियों के विकास, उनकी वर्तमान स्थिति और लॉजिस्टिक्स क्षेत्र पर उनके प्रभाव का पता लगाता है। यह पंजाब और गुजरात जैसे राज्यों के मामले के अध्ययन पर केंद्रित है, जिन्होंने क्रमशः इंटीग्रेटेड लॉजिस्टिक्स एंड लॉजिस्टिक्स पार्क पॉलिसी 2023 और इंटीग्रेटेड लॉजिस्टिक्स एंड लॉजिस्टिक्स पार्क पॉलिसी 2021 जैसी महत्वपूर्ण नीतियां पेश की हैं। इन नीतियों का उद्देश्य भंडारण सेवाओं, सामग्री प्रबंधन, पैकेजिंग सुविधाओं और परिवहन सुविधाओं को बढ़ाना है। यह माल ढुलाई लागत और समय को कम करने, भंडारण लागत में कटौती करने, वाहन प्रदूषण और भीड़भाड़ को कम करने और खेप की ट्रेकिंग और पता लगाने की क्षमता में सुधार करने में इन नीतियों की प्रभावशीलता पर गहराई से चर्चा करता है। यह इन नीतियों को लागू करने में आने वाली चुनौतियों पर भी चर्चा करता है और भविष्य के नीति-निर्माण के लिए सिफारिशें प्रदान करता है। यह पता लगाता है कि हालांकि इन नीतियों ने लॉजिस्टिक्स बुनियादी ढांचे में सुधार करने में महत्वपूर्ण प्रगति की है, लेकिन यह सुनिश्चित करने के लिए निरंतर समीक्षा और संशोधन की आवश्यकता है कि वे लगातार विकसित हो रहे लॉजिस्टिक्स क्षेत्र में प्रासंगिक और प्रभावी बने रहें। शोध भारत के लॉजिस्टिक्स बुनियादी ढांचे को बढ़ाने और इसे अधिक कुशल और लागत प्रभावी बनाने में इन नीतियों के महत्व को रेखांकित करता है। यह लॉजिस्टिक्स क्षेत्र में सुधार के लिए सरकार की प्रतिबद्धता को भी उजागर करता है, जिसे आर्थिक विकास की रीढ़ माना जाता है। यह स्पष्ट है कि यह सुनिश्चित करने के लिए निरंतर प्रयासों की आवश्यकता है कि इन नीतियों को प्रभावी ढंग से लागू किया जाए और वांछित परिणाम दिए जाएं। थीसिस नीति निर्माताओं, उद्योग हितधारकों और भारत के लॉजिस्टिक्स क्षेत्र में रुचि रखने वाले शोधकर्ताओं के लिए मूल्यवान अंतर्दृष्टि प्रदान करेगी।

मुख्य शब्द -- लॉजिस्टिक्स पॉलिसी इंडिया, इंटीग्रेटेड लॉजिस्टिक्स एंड लॉजिस्टिक्स पार्क पॉलिसी, सामग्री प्रबंधन, पैकेजिंग सुविधाएं, परिवहन सुविधाएं, माल ढुलाई लागत, भंडारण लागत, वाहन प्रदूषण और भीड़, आपूर्ति श्रृंखला प्रबंधन, नीति-निर्माण, लॉजिस्टिक्स बुनियादी ढांचा, आर्थिक विकास।

CHAPTER 1: INTRODUCTION AND CONTEXTUAL BACKGROUND

BACKGROUND

1.1 Definition

'Logistics' means Transportation & handling of goods between points of production and consumption, storage, value addition and allied services. The logistics infrastructure comprises of nodes and connections, more recognizable as ports, stations, Multimodal Logistics Parks (MMLPs), warehouses, and other business premises, connected by roads, railways, shipping, inland waterways, air routes, pipelines, etc., that are used by a wide range of carriers. This system is operated under a framework through a workforce with a wide range of knowledge of skills and technologies.



Figure 1- Logistics Cycle

1.2 Background

The Indian logistics market is estimated to be worth around \$215 billion in the next two years compared to \$160 billion. It was estimated that this market would grow to 563 billion dollars in 2030, at a compound annual growth rate of 9.4 percent. National Logistics Policy (NLP) Launched by Prime Minister Narendra Modi on 17th September 2022, the NLP aims to lower the cost of logistics from the existing 13-14% and lead it to par with other developed countries. The goal of this policy is to make the logistics industry more efficient and lower its costs. The Prime Minister's initiative, PM Gati-Shakti, also known as the National Master Plan for multi-modal connectivity, was introduced in the previous year, was an essential first step. Various states in India have also implemented their own logistics policies to address state-specific challenges and opportunities.

1.3 Logistics Policy Index (LPI)

The LPI stands as an interactive benchmarking tool meticulously designed to aid countries in pinpointing both their strengths and weaknesses in trade logistics. Crafted to facilitate improvements, it consists of two integral components:

Firstly, it draws upon a comprehensive worldwide survey conducted among key players in international logistics, including global freight forwarders and express carriers. Their first hand experiences provide invaluable insights into the logistical landscape of 139 countries, enabling detailed comparisons.

Complementing this survey data is the second component, which harnesses granular, real-time information sourced from various data partners. This includes detailed data on maritime shipping, container tracking, postal services, and air freight activities. Such high-frequency data offers a dynamic perspective, enriching the understanding of logistics performance and aiding in targeted interventions for enhancement.

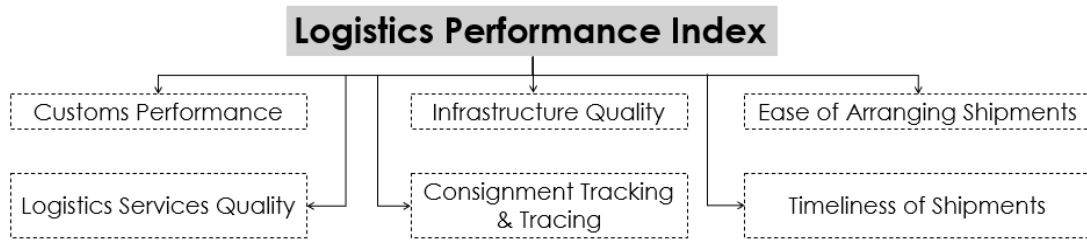


Figure 2- Logistics Performance Index Parameters

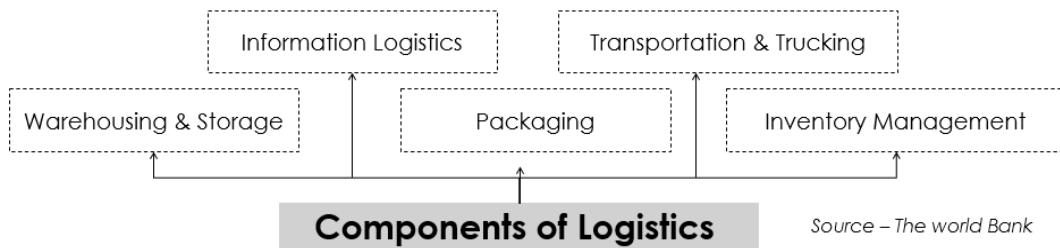


Figure 3- Components of Logistics

1.4 Logistics Supply Chain

There are three major components of Logistics

Warehousing: Warehousing refers to the storage and management of goods within a facility. Warehouses play a crucial role in the logistics and supply chain by providing storage space for inventory, facilitating the movement of goods, and serving as distribution centres. Key functions of warehousing include receiving, storing, picking, packing, and shipping goods. Modern warehouses often utilize advanced technologies such as automation, robotics, and inventory management systems to improve efficiency and accuracy in handling inventory.

Transportation: Transportation involves the movement of goods from one location to another within the supply chain. It encompasses various modes of transportation, including road, rail, air, sea, and multimodal transportation. Transportation plays a vital role in connecting suppliers, manufacturers, distributors, and customers, enabling the flow of goods and ensuring timely delivery. Efficient transportation management is essential for minimizing transit

times, reducing costs, optimizing routes, and enhancing overall supply chain performance.

Urban Freight: Urban freight refers to the transportation and delivery of goods within urban areas or cities. With the rapid growth of urbanization and e-commerce, urban freight management has become increasingly important for addressing congestion, pollution, and last-mile delivery challenges in densely populated areas. Urban freight solutions focus on optimizing delivery routes, using alternative transportation modes like bicycles or electric vehicles, implementing micro-distribution centres, and leveraging technology for real-time tracking and scheduling to improve efficiency and sustainability in urban logistics operations.



Figure 4- Logistics Supply chain

1.5 Four Pillars of Logistics Policy.

The four pillars of logistics encompass key strategies and initiatives aimed at enhancing the efficiency and effectiveness of logistics operations. Let's delve into each one:

Integration of Digital System (IDS): This pillar focuses on leveraging digital technologies to streamline and integrate various aspects of logistics operations.

By implementing digital systems such as inventory management software, supply chain visibility platforms, and electronic documentation systems, organizations can improve real-time tracking, reduce paperwork, enhance communication, and optimize resource allocation.

Unified Logistics Interface Platform (ULIP): ULIP aims to create a centralized platform that facilitates seamless interaction and collaboration among stakeholders within the logistics ecosystem. It serves as a one-stop interface for accessing information, processing transactions, and coordinating activities related to freight movement, warehousing, transportation, and other logistics services. ULIP promotes transparency, interoperability, and efficiency across the supply chain.

Ease of Logistics (ELOG): ELOG emphasizes the simplification and streamlining of regulatory procedures, documentation requirements, and administrative processes related to logistics activities. By reducing bureaucratic hurdles and eliminating unnecessary barriers, ELOG aims to enhance the ease and speed of conducting logistics operations. This pillar includes initiatives such as digitizing paperwork, implementing single-window clearance systems, and harmonizing standards and regulations across jurisdictions.

System Improvement Group (SIG): SIG focuses on continuous improvement and optimization of logistics systems and processes. It involves the establishment of dedicated teams or committees tasked with monitoring performance metrics, identifying bottlenecks, and implementing targeted interventions to enhance efficiency, reliability, and resilience within the logistics ecosystem. SIG fosters a culture of innovation, collaboration, and continuous learning, driving ongoing improvements in logistics performance.

1.6 Literature Study

Several research papers have shed light on the challenges and opportunities within India's logistics sector, offering valuable insights for policymakers and stakeholders. Some of them are explained below

In "Freight Traffic Impacts and Logistics Inefficiencies in India: Policy Interventions and Solution Concepts for Sustainable City Logistics" (2022) by Prasanta K. Sahu, it was found that a significant portion of global transport energy consumption is attributed to freight movements. Notably, trucking constitutes a substantial share, highlighting the dominance of road freight in India. The identified gap underscores the need to address the unbalanced modal mix and the rapid growth in road freight to achieve sustainable city logistics.

"India - On the Cusp of a Logistics Revolution" (2018) highlighted India's improvement in the World Bank LPI Index, reflecting progress in logistics performance. However, despite this advancement, a critical gap persists: the absence of a robust logistics sector in India. This underscores the necessity for strategic interventions to strengthen and modernize the logistics infrastructure to capitalize on emerging opportunities.

Pankaj Chandra and Nimit Jain's research paper, "The Logistics Sector in India: Overview and Challenges" (2007), delved into the fragmented nature of the transportation industry in India, characterized by numerous small fleet operators. The identified gap emphasizes the lack of a common platform for fleet operators to collaborate and make collective decisions. Addressing this gap could foster greater efficiency and coordination within the logistics ecosystem.

1.7 Timeline for logistics policies

2012	Madhya Pradesh Warehousing and logistics policy	Government of Madhya Pradesh
2012	Uttar Pradesh Warehousing & logistic policy	Government of Uttar Pradesh
2022	Uttar Pradesh Warehousing & logistic policy	Government of Uttar Pradesh
2018-2023	Chhattisgarh State Logistic Park policy	Department of commerce and industries, govt. of Chhattisgarh
2018	Maharashtra Logistic Park Policy	Govt. Of Maharashtra department of industries
2019	Haryana Logistics, Warehousing & Retail Policy	Industries & Commerce Department, Haryana
2021	Kerala state logistics action plan	Kerala industrial infrastructure development corporation
2021	Gujarat Integrated Logistics & Logistics park policy	Gujarat Infrastructure Development Board
2022	NATIONAL LOGISTICS POLICY	MINISTRY OF COMMERCE AND INDUSTRY (Department for Promotion of Industry and Internal Trade)
2022	Rajasthan Logistics, warehousing and Logistic park policy (Draft)	Government of Rajasthan
2022	Assam logistic and warehousing policy	Industries, Commerce & Public Enterprise Department, Assam
2022	Himachal Pradesh Logistics Policy	Government of Himachal Pradesh
2022	The Mizoram State Logistics Policy	Department of commerce and industries, Mizoram

2022	Manipur Integrated logistics policy	Department of Textile commerce and industries, Manipur
2022	Odisha logistics policy	Commerce and transport department, Odisha
2022	Andhra Pradesh Logistics Policy	Industries of commerce department, Andra Pradesh
2023	Integrated Logistics & Logistics Park Policy	Department OF Industries and Commerce
2023	Smart urban freight and city logistics	Directorate of Urban Land Transport Urban Development Department, Govt. of Karnataka
2023	CITY LOGISTIC PLAN Prayagraj Draft Final Report	Prayagraj Development Authority

1.8 Aim

To provide recommendations for future policy-making to ensure improvement of India's logistics infrastructure.

1.9 Objective

- To Evaluate the Current State of Logistics policy.
- Comparison between logistics policy of different states.
- To Identify parameters of logistics policies of different states.
- To identify the logistics as an industry.

1.10 Scope

- Comparison of logistics policies and infrastructure.
- Understanding how logistics policies directly affect business operations.
- Explore current state of technology integration in logistics.
- Environmental impact of current logistics practices in various states.

CHAPTER 2: RESEARCH METHODOLOGY

The literature review delves into the various research themes in a sequential manner.

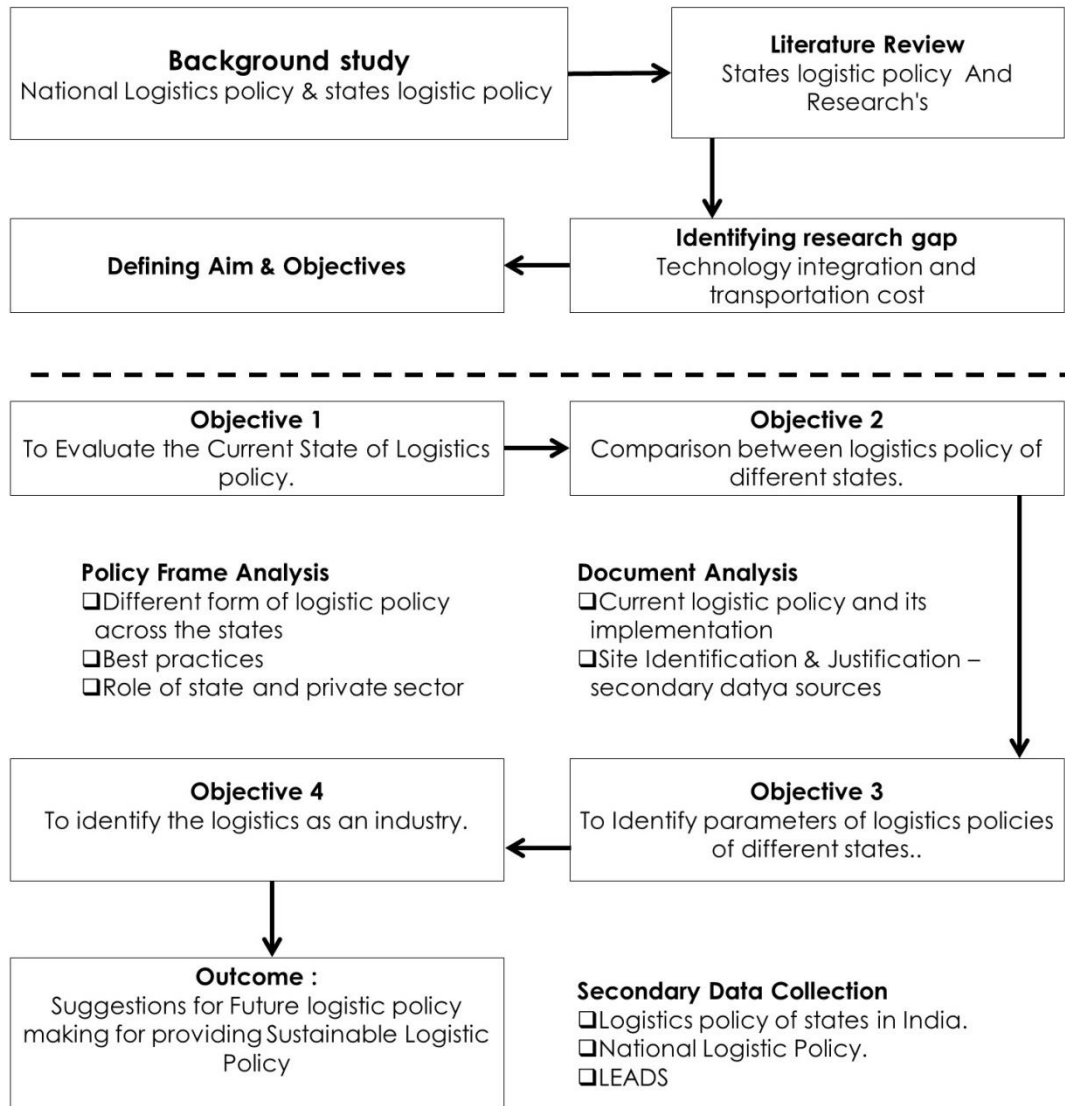


Figure 5- Research methodology

This chapter delves into the detailed research methodology employed to assess the Logistics Policy of the States in India. This study examines the enforcement of Logistics Policies of states in India and analyses their impact on India's Economy and Development.

Stage 1: Literature Review

In order to accomplish the first objective, this is to examine Logistics policy of States in India, thorough review of academic journals, books, research papers, and reports, National Logistics Policy and Logistics Policies of every States in India. This review will help to understand the theoretical foundations of Logistics Policies and their role in Transport Planning. National Logistics Policy 2022 and , PM Gati-Shakti, as well as the existing research on Logistics Policies in various contexts, acts and rules in relevant areas, etc. The finalisation of the research's indicators, aim, and objectives is an outcome of this stage.

Stage 2: Background study and baseline assessment

Background studies and baseline assessments have been completed in order to achieve the second research objective, which is to examine the compliance of Logistics Policies of States in India. Some of the stages involved include existing situation analysis, documenting the present conditions of various Logistics Parks, Warehouses, and Transportation System of goods. Other steps include secondary data collection

Stage 3: Data Analysis

An analysis of the collected data has been done in order to accomplish the third objective, which is to identify the Parameters of every Logistics Policy to evaluate the nature of the policy.

Stage 3: Proposals and Recommendations

An analysis of the collected data has been done in order to accomplish the fourth objective, which is to identify Logistics as an Industry, Measures to make Logistics Industry, benefits of making Logistics as Industry, and future Recommendations

CHAPTER 3: LITERATURE REVIEW

This chapter outlines the current State of Logistics Policy and its workability while comparing it with the other Countries. It is achieved by Literature review on the Policies of each States along with the city logistic plan and national logistics policy

3.1 Current state of logistics policy

In the realm of logistics in India, multiple ministries play distinct roles, including the Ministry of Commerce and Industry, the Ministry of Road Transport and Highways (MoRTH), the Ministry of Civil Aviation, the Ministry of Railways, the Directorate General of Foreign Trade (DGFT), and various State Governments. However, there lacks a unified ministry or platform specifically dedicated to overseeing logistics operations comprehensively. Despite this fragmented governance structure, India has made notable strides in its global logistics ranking, currently standing at 38 out of 139 countries according to the Logistics Performance Index (LPI). This ranking reflects a significant improvement, climbing six places from 2018 and sixteen places from 2014. The LPI score is a composite measure encompassing six key attributes: Customs procedures, Infrastructure quality, International shipments, Logistics competence, Tracking and tracing capabilities, and Timeliness of deliveries. This upward trajectory in

India's logistics performance underscores the nation's commitment to enhancing its logistical capabilities and infrastructure, albeit in the absence of a centralized governing body for the logistics sector.

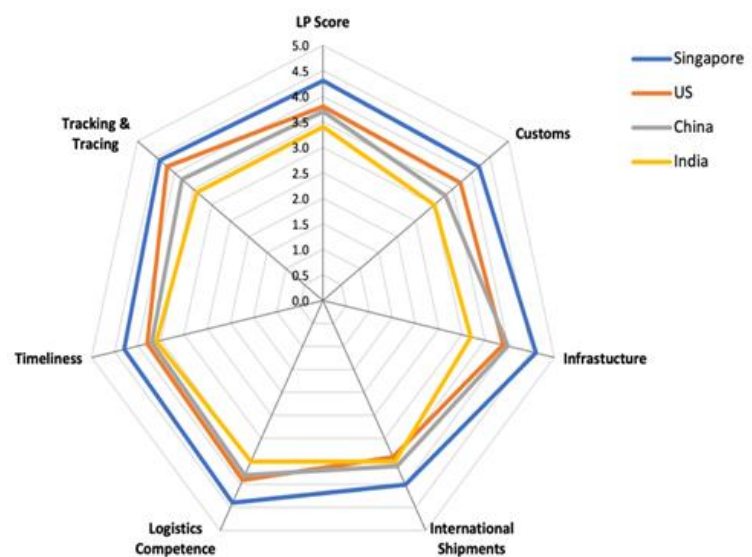
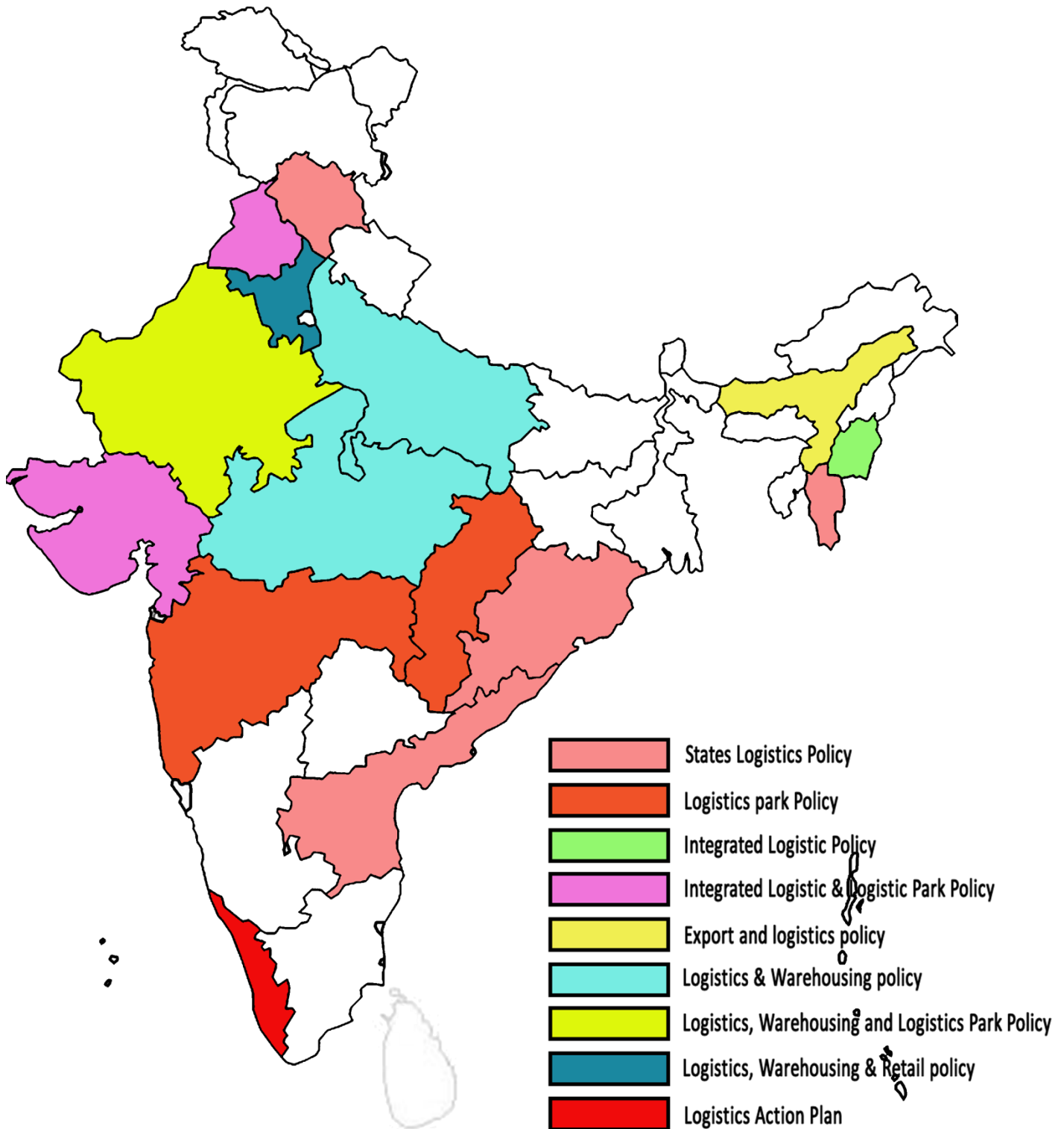


Figure 6- Logistics Performance Index of major economies



Only **14** States have their Logistics Policy

Figure 7- India map with states having logistic policy

3.2 States Logistics Policy Comparison

In the logistics policies of various Indian states, a total of 51 parameters have been identified for implementation. Among these, Maharashtra has outlined 21 parameters, making it one of the most comprehensive in its logistic strategy. Following closely behind, Gujarat covers 22 parameters, demonstrating a robust approach to logistical planning. Other states with substantial coverage include Manipur, which addresses 23 parameters, and Haryana and Mizoram, each encompassing 20 and 21 parameters, respectively. Additionally, Himachal Pradesh and Uttar Pradesh both cover 19 parameters, while Kerala and Andhra Pradesh cover 20 and 21 parameters, respectively. Rajasthan, with 17 parameters, and Odisha with 16, also contribute significantly to the logistical landscape. Meanwhile, Chhattisgarh focuses on 12 parameters, Madhya Pradesh on 4, and Assam on 9, reflecting varying degrees of emphasis on logistical aspects within their policies. These diverse approaches highlight the intricate nature of logistical planning and its importance across different states in India.

3.3 Parameters of Logistics Policy

The parameters identified in the logistics policies of the various Indian states are broadly divided into 13 parts, each encompassing crucial aspects of logistical planning and implementation.

Part 1 focuses on the vision, aim/objective, and target/mission of the logistics policy, laying down the overarching goals and aspirations.

Part 2 delves into the financial aspects, including provisions for subsidy, incentives, loans, and schemes aimed at fostering growth and development within the logistics sector.

Part 3 addresses law and order concerns, policy formulation, and the periodic review process to ensure alignment with evolving needs and objectives.

Part 4 concentrates on supply chain management, covering aspects such as cold supply chain logistics and the integration of e-commerce platforms to enhance efficiency and reach.

Part 5 deals with infrastructure considerations, including floor space index regulations, warehouse specifications, and incentives for establishing logistics facilities in designated zones.

Part 6 emphasizes critical infrastructure requirements, encompassing existing facilities, transport networks, and storage and handling capabilities essential for seamless logistical operations.

Part 7 focuses on human resource aspects, including provisions for security guards, compliance with labor laws, and initiatives for employment generation and skill development within the logistics sector.

Part 8 outlines the institutional framework for logistics planning and governance, including the establishment of planning authorities and facilitation cells to streamline processes.

Part 9 addresses environmental concerns, emphasizing power consumption, and the need for environmental impact assessments to ensure sustainable logistical practices.

Part 10 delineates eligibility criteria for logistics policy implementation, emphasizing standardization and the contents of the logistics policy document.

Part 11 highlights initiatives for streamlining processes, such as single-window clearance mechanisms and the integration of technology to promote green logistics practices.

Part 12 focuses on strategic planning initiatives, including the formulation of master plans at both national and state levels to guide long-term logistical development.

Part 13 underscores the importance of last-mile connectivity and provisions for vehicle purchase to enhance the efficiency and effectiveness of logistical operations across the supply chain.

	MAHARASHTRA	CHHATTISGARH	MADHYA PRADESH	ASSAM	RAJASTHAN(DRAFT)	GUJARAT	HIMACHAL	UTTARPRADESH	HARYANA	MIZORAM	MANIPUR	ODISHA	ANDHRA PRADESH	KERLA
VISION	1				1	1	1		1	1	1	1	1	1
AIM / OBJECTIVES	1	1	1	1	1	1	1	1	1	1	1	1	1	1
STRATEGY	1	1	1		1									1
TARGETS / MISSION	1													1
ELIGIBILITY	1	1												1
ELIGIBILITY CRITERIA FOR LP	1	1												1
FINANCE	1				1									1
CONTENTS OF LP	1	1												1
PROCEDURE FOR DEVELOPING LP	1				1			1	1	1	1	1	1	1
SUBSIDY	1				1	1	1	1	1	1	1	1	1	1
INCENTIVE	1				1									1
LOAN	1													1
PLANNING AUTHORITY	1							1	1	1	1	1	1	1
FSI	1													1
WAREHOUSE GROUND COVERAGE	1							1	1	1	1	1	1	1
ZONE RESTRICTION	1													1
SUPPLY CHAIN	1						1		1	1	1	1	1	1
COLD CHAIN SUPPLY	1													1
WAREHOUSE HEIGHT RESTRICTION	1							1	1	1	1	1	1	1
POWER CONSUMPTION	1							1	1	1	1	1	1	1
CRITICAL INFRA	1													1
SECURITY GUARDS	1													1
SINGLE WINDOW CLEARANCE	1				1		1	1	1	1	1	1	1	1
LABOUR LAW	1													1
TECHNOLOGY INTEGRATION	1			1	1	1	1	1	1	1	1	1	1	1
STANDARDIZATION	1													1
EMPLOYMENT GENERATION	1			1	1	1	1	1	1	1	1	1	1	1
SKILL DEVELOPMENT	1			1	1	1	1	1	1	1	1	1	1	1
SEZ	1			1	1	1	1	1	1	1	1	1	1	1
ENVIRONMENT	1													1
LOCATIONAL ADVANTAGE	1			1	1	1	1	1	1	1	1	1	1	1
EXISTING INFRA	1													1
LAST MILE CONNECTIVITY	1													1
ROAD SIDE AMENITIES	1													1
TRANSPORT INFRA	1			1	1	1	1	1	1	1	1	1	1	1
GREEN LOGISTICS	1													1
LOGISTIC INFRA... / REQUIREMENT	1	1	1	1	1	1	1	1	1	1	1	1	1	1
INSTITUTIONAL FRAMEWORK	1													1
INTEGRATED COMMITTEE	1			1	1	1	1	1	1	1	1	1	1	1
SCHEMES	1				1									1
CENTRAL GOVT SCHEMES	1													1
LAW & ORDER	1													1
IMPACT ASSIGNMENT	1													1
POLICY	1													1
POLICY PERIOD & REVIEW	1			1	1	1	1	1	1	1	1	1	1	1
PM MASTER PLAN	1													1
LOGISTICS MASTERPLAN	1				1	1	1	1	1	1	1	1	1	1
DPC	1													1
AIR FREIGHT	1													1
TRADE FACILITATION CELL	1													1
LOGISTICS POLICY CELL	1													1
E-COMMERCE	1													1
STORAGE AND HANDLING FACILITIES	1													1
LEADS	1													1
INDUSTRY STATUS	1													1
QUALITY STORAGE FACILITIES	1													1
STANDARDIZATION	1													1
VEHICLE PURCHASE	1													1
INLAND WATERWAYS	1													1
	21	12	4	9	17	22	19	19	20	21	23	16	21	20

Figure 8- comparison of Logistics Policy

3.4 Study Area Selection Criteria

Based on the comparison conducted, several states have emerged as frontrunners in comprehensive logistical planning, including Manipur, Gujarat, Mizoram, Andhra Pradesh, Maharashtra, Haryana, Himachal Pradesh, Uttar Pradesh, Rajasthan, Odisha, and Chhattisgarh. These states have demonstrated a robust approach by covering a broad spectrum of parameters within their logistics policies. For further study, attention is directed towards Gujarat, renowned for its coverage of 22 parameters, indicating a thorough approach to logistical planning. Maharashtra stands out due to its emphasis on coastal trade, offering unique opportunities and challenges in maritime logistics. Rajasthan's policy, although covering 17 parameters, is in the draft stage, presenting an opportunity for analysis of its potential impact post-finalization. Haryana's logistics policy, recognized as the best policy by the LEADS Report, offers insights into effective policy formulation and implementation. Additionally, Madhya Pradesh, despite being landlocked, warrants further examination due to its strategic positioning and potential implications for inland logistics and connectivity. These selected states offer diverse perspectives and approaches to logistical planning, making them valuable subjects for in-depth analysis and comparison in the realm of logistical policy development and implementation.

3.4.1 Gujarat Integrated Logistics and Logistics Park Policy 2021

Advantage of the State

The Gujarat Integrated Logistics and Logistics Park Policy 2021 reflects the state's strategic vision to capitalize on its unique geographical advantages and bolster its position as a logistics hub. With a coastline spanning 1600 kilometers and hosting one major and 48 minor ports, Gujarat plays a crucial role in handling 40% of the country's cargo, amounting to 514 million tonnes annually. The state is strategically positioned along key transportation corridors, including the Delhi Mumbai Industrial Corridor (DMIC) and the Western Dedicated Freight Corridor (DFC), with approximately 560 kilometers of the DFC passing through Gujarat.

To capitalize on these advantages, logistics parks have been planned to enhance rail-based traffic, while initiatives such as the proposed Ahmedabad Dholera Expressway aim to further improve connectivity within the state. The policy also entails the development of 11 jetties, with plans for more, and proposes seven rail connectivity projects to provide access to industrial areas. Key objectives include the mapping of facilities for unified development, efficient utilization of current infrastructure, and the development and augmentation of logistics facilities across the state. Additionally, measures are outlined to strengthen first and last-mile connectivity, enhance the ease of doing business, promote private sector participation, and improve the quality of logistics facilities and services. The policy also emphasizes the promotion of technology and innovation, skill development, sustainability, and resilience for crisis management. An institutional framework has been established for the effective implementation of the policy, along with a range of incentives and interventions identified to incentivize and support the growth of the logistics sector in Gujarat.

3.4.2 Maharashtra's Logistics Parks Policy 2018

Eligibility for establishment of Logistic Park

Private landowners or developers, as well as companies with legal entities, have the opportunity to play a significant role in the establishment of logistics parks. Additionally, leaseholders of Maharashtra Industrial Development Corporation (MIDC) land with a minimum remaining lease period of 30 years are eligible to set up logistics parks. This provision allows for the utilization of existing industrial land resources under MIDC ownership, ensuring efficient use of available infrastructure and promoting the development of logistics facilities to meet growing demand. By leveraging private sector participation and existing lease arrangements, Maharashtra aims to accelerate the establishment of logistics parks, thereby enhancing the state's logistical capabilities and supporting economic growth.

Logistic parks are comprehensive hubs designed to facilitate efficient logistics operations and support various related activities. These parks typically encompass logistics services such as warehousing, transportation, and distribution, alongside essential infrastructure like roads, utilities, and storage facilities. Additionally, they incorporate business and commercial facilities to cater to the needs of tenants and visitors, including office spaces, retail outlets, and dining establishments. Common facilities such as security services, maintenance, and waste management are also integral components of logistic parks, ensuring smooth and sustainable operations.

In Maharashtra, the development and establishment of logistic parks are governed by the Maharashtra Regional & Town Planning Act, 1966, specifically under Section 154, which provides directions for their setup. Furthermore, the state has introduced an Integrated Logistics Park policy, reflecting its commitment to promoting the growth and development of logistics infrastructure. Under this policy, the Maharashtra Industrial Development Corporation (MIDC) is designated as the Special Planning Authority for the development of Integrated Logistic Parks across the state. Additionally, incentives such as up to 200% additional Floor Space Index (FSI) are provided for Integrated Logistics Parks and Logistic Parks. Integrated logistic parks are permitted higher ground coverage of up to 75%, with buildings allowed to reach a maximum height of 24 meters. These measures are aimed at incentivizing and facilitating the development of modern, integrated logistic parks to meet the evolving needs of the logistics industry while driving economic growth and competitiveness in Maharashtra.

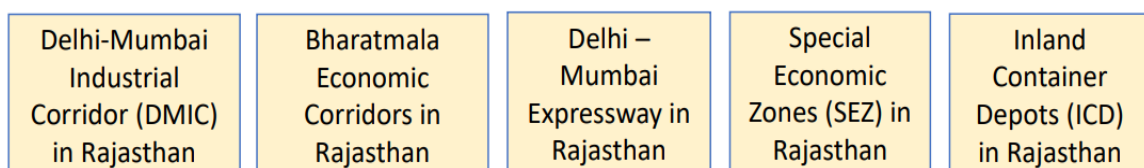
Integrated and Co-ordinated approach

The establishment and development of logistic parks in Maharashtra involve the collaboration and coordination of various key government departments and agencies. The Additional Chief Secretary or Principal Secretary of the Industry Department plays a pivotal role in overseeing and guiding the strategic direction

of logistic park initiatives. The Principal Secretary of the Public Works Department contributes to the planning and development of necessary infrastructure, ensuring the efficient functioning of logistic parks. Maharashtra Industrial Development Corporation (MIDC) assumes a central role in facilitating the establishment and management of logistic parks, leveraging its expertise and resources in industrial development. Additionally, the Principal Secretary or Secretary of the Transport Department, Urban Development-1, Energy, and Skill Development Departments are integral stakeholders, contributing their respective expertise and resources to support logistic park initiatives. Furthermore, the Development Commissioner (Industries) serves as the Member Secretary, responsible for coordinating and facilitating collaboration among the various departments and agencies involved in the development of logistic parks, ensuring effective implementation and alignment with broader industrial and economic objectives in Maharashtra.

3.4.3 Rajasthan Logistics, Warehousing and Logistics Park Policy – 2022

Rajasthan, situated in the northwestern region of India, boasts a unique geographical position, sharing an international border with Pakistan and state borders with five neighboring states within India: Punjab, Haryana, Uttar Pradesh, Madhya Pradesh, and Gujarat. This strategic location positions Rajasthan as a vital nexus facilitating connectivity between Northern and Western India. The state serves as a crucial corridor for major road and rail projects traversing its territory, playing a pivotal role in linking key economic regions across the country. Through its extensive transportation infrastructure network, Rajasthan facilitates the movement of goods and people, contributing significantly to regional and national economic integration and development.



Ease of doing Business

In a concerted effort to bolster the logistics and warehousing sector in Rajasthan, the state government has launched 'RAJNIVESH,' a pioneering one-stop-shop equipped with advanced IT capabilities to streamline processes and enhance operational efficiency. Furthermore, recognizing the significance of the logistics industry, a dedicated division has been established within the Department of Industries and Commerce to oversee its development and regulation. An extensive assessment of departmental regulations pertaining to logistics, warehousing, and logistics park sectors has been undertaken to ensure alignment with industry requirements and standards. The government is committed to providing robust support for the development of the logistics and warehousing sector, including initiatives aimed at strengthening infrastructure and offering fiscal incentives to incentivize investment and growth. To facilitate effective policy implementation and monitoring, the Rajasthan Logistics, Warehousing, and Logistics Park Policy Monitoring Committee have been established, comprising relevant stakeholders. Acting as the nodal coordinating, monitoring, and implementing department, the Department of Industries and Commerce assumes a pivotal role in driving forward the state's logistics agenda, fostering a conducive environment for industry advancement and economic prosperity.

Gross State Domestic Product



3.4.4 Haryana Logistics, Warehousing and Retail Policy – 2019

The proposed logistics policy includes provisions to encourage private sector participation in the establishment of at least 5 Logistics Parks (LP), aimed at enhancing logistical capabilities and fostering economic growth. These LPs are anticipated to generate substantial employment opportunities, potentially reaching up to 25,000 jobs, while also facilitating the development of logistics hubs in major urban centers. The logistics park area will be strategically bifurcated to accommodate various facilities, including dedicated spaces for cold chain facilities to preserve perishable goods effectively. Furthermore, provisions are made for the development of retail enterprises or retail hubs within the logistics park premises, catering to the evolving needs of consumers and contributing to the overall efficiency and competitiveness of the logistics sector. These initiatives reflect a concerted effort to leverage private sector investment and innovation to enhance logistical infrastructure and drive economic development.

Logistics & Warehousing

The proposed logistics policy capitalizes on significant locational advantages, with 60% of the area falling within the influence zones of the Delhi-Mumbai Industrial Corridor (DMIC) and the Amritsar-Kolkata Industrial Corridor (AKIC). This strategic positioning provides access to expansive economic corridors, facilitating seamless connectivity and trade linkages. Notably, the Faridabad-Palwal industrial area is situated in close proximity to the Dedicated Freight Corridor (DFC), enhancing transportation efficiency and connectivity to key markets. The region boasts a robust railway infrastructure, encompassing 1710 railway routes, with a rail route density of 39 per 1000 square kilometers, complemented by a network of 29 State highways and 15 National Highways. This comprehensive transportation network ensures efficient movement of goods and materials, further accentuating the area's appeal as a logistics hub and fostering economic growth and development.

Existing Ecosystem

The logistics landscape in the region is bolstered by the presence of 9 Inland Container Depots (ICDs), 3 Container Freight Stations, and a private Freight Terminal, underscoring the area's importance as a key logistics hub. Additionally, there are 33 operational logistics and warehousing units, collectively facilitating the handling of 10 lakh Twenty-Foot Equivalent Units (TEUs) annually. Government policies such as the Haryana Enterprise Promotion Policy (EPP 2015) and the Maha Nivesh Yojana provide support to small logistics units, offering a range of financial incentives to promote growth and investment in the sector. These incentives include capital subsidies, 100% reimbursement of stamp duty, exemptions on electricity duty, and special packages of incentives, aimed at fostering a conducive business environment and driving economic development. Such initiatives reflect a concerted effort to stimulate the growth of the logistics industry, attracting investment and promoting employment opportunities in the region.

The logistics policy framework includes the implementation of a single window clearance mechanism, streamlining administrative processes and facilitating ease of doing business for logistics ventures. Additionally, there is a focus on promoting diverse employment opportunities, with special consideration given to employment types and timings, particularly for women. Furthermore, initiatives are underway to integrate warehousing facilities with retail activities in agriculture zones, utilizing 10 acres of land for this purpose. This integrated approach aims to optimize land utilization while fostering agricultural value chains and supporting rural economies. Moreover, operational hours for stores are being regulated to ensure consistency and efficiency in service delivery, catering to the dynamic needs of consumers while enhancing overall operational effectiveness. These measures collectively contribute to the development of a robust and inclusive logistics ecosystem, promoting economic growth and social empowerment.

Efforts towards infrastructure augmentation in the logistics sector are underway, with a focus on public-private partnerships (PPPs) to establish the largest logistics hub in North India. Joint ventures (JVs) between Haryana State Industrial and Infrastructure Development Corporation (HSIIDC) and Delhi-Mumbai Industrial Corridor (DMIC) are being forged to further this objective, aiming to leverage synergies and resources for comprehensive development. Initiatives such as truckers' way-side amenities and the establishment of logistics zones along the Kundli-Manesar-Palwal (KMP) expressway are being pursued to enhance operational efficiency and convenience for logistics stakeholders. Additionally, attention is directed towards addressing last-mile connectivity challenges and providing essential amenities for workers, ensuring a conducive environment for sustained growth and productivity in the logistics sector. These strategic interventions reflect a commitment to fostering collaboration, innovation, and infrastructure development to catalyze the growth of the logistics industry in the region.

3.4.5 Madhya Pradesh Logistics and Warehousing Policy 2012

Advantage of the State



State to have a dedicated policy targeting logistics and warehousing in INDIA.



State to have a PPP based Multi Modal Logistics Park under the umbrella of the MPLWP 2012.

Composite Logistics Hub Project, Pawarkheda, Hoshangabad, MP Area- 115 Acre Phase I- 88.3 Acres

The existing infrastructure comprises warehouses with a total capacity of 21,500 metric tons (MT), which is slated for expansion to accommodate growing

demands. Additionally, cold storage facilities, currently capable of holding 2,600 MT, are also scheduled for enlargement to meet increasing requirements. The cargo handling capacity stands at 2,500 MT, reflecting the infrastructure's capability to manage substantial volumes of goods efficiently. Furthermore, the presence of two railway sidings enhances connectivity and facilitates the seamless movement of goods. Proposed expansions include the establishment of a new cold storage facility with a capacity of 1,400 MT, intended for processing units dealing with flour, maida, pulses, potato chips, among other commodities. The estimated cost for these infrastructure enhancements amounts to 138.5 crore rupees, demonstrating a substantial investment in bolstering logistics capabilities to meet burgeoning demands effectively.

Incentives (Long Term)

The proposed logistics policy entails several key provisions aimed at enhancing warehousing infrastructure and facilitating efficient logistics operations. One such provision includes reserving 10% of land in proposed greenfield industrial estates/clusters for warehousing purposes, ensuring adequate space allocation for storage facilities within industrial zones. Additionally, the approval process for establishing warehouses in existing clusters will be streamlined, with decisions based on factors such as demand, land availability, and connectivity to optimize logistical efficiency. Furthermore, efforts will be made to identify a minimum of 50 acres of land in 10 districts designated as 'warehousing zones,' dedicated specifically to warehousing activities to meet growing demands. To incentivize investment in new warehouse locations, long-term lease agreements will be offered at small-scale industrial unit rates, promoting affordability and accessibility for potential investors. Introducing various business guarantee modes such as Silo Bags will further enhance warehousing capacity and operational flexibility. Moreover, a single-window clearance mechanism through the Trade and Investment Facilitation Corporation (TRIFAC) will be established to expedite approval processes for all proposals and projects under this policy, fostering a conducive environment for logistics sector growth and development.

Early Bird Incentives (Short Term)

Under the proposed logistics policy, financial incentives are offered to incentivize investment in warehousing infrastructure. For projects with investments exceeding INR 1 crore, a capital subsidy of 15% is provided, subject to a maximum cap of INR 2.25 crore, specifically aimed at infrastructure development targeting a cumulative warehousing capacity of 50,000 metric tons. Additionally, new warehousing projects exceeding the INR 1 crore investment threshold qualify for a 5% per annum interest subsidy on term loans for a duration of 7 years, further reducing the financial burden on investors. Expansion projects with investments of INR 1 crore or more are treated as new projects, making them eligible for the aforementioned incentives, even if the units were licensed before the publication of the policy. These measures are designed to encourage significant investment in the expansion and establishment of warehousing facilities, thereby bolstering logistics infrastructure and fostering economic growth.

Logistics as an Industry

Across India, a total of 21 states and 2 Union Territories (UTs) have officially notified their individual Logistics Policies, demonstrating a widespread recognition of the importance of the logistics sector in fostering economic growth and development. Additionally, 15 states along with 1 UT have bestowed Industry status upon the logistics sector, acknowledging its significant contributions to the national economy. Notably, the states of Assam, Gujarat, Kerala, Odisha, and Tamil Nadu have gone a step further by designating Logistics as a Priority sector, signalling a heightened focus on facilitating the growth and efficiency of logistics operations within their jurisdictions. These proactive measures taken by various states and UTs underscore a concerted effort to bolster the logistical infrastructure and support services, thereby fostering a conducive environment for both domestic and international trade.

3.4.6 Uttar Pradesh Warehousing and Logistics Policy 2018

The Uttar Pradesh Warehousing and Logistics Policy outline the strategic initiatives and incentives introduced by the Government of Uttar Pradesh to boost the logistics and warehousing sector in the state. The policy aims to leverage Uttar Pradesh's advantageous geographical location, extensive transportation network, and upcoming infrastructure projects to attract investments and facilitate the seamless movement of goods within the state and beyond.

One of the key highlights of the policy is the focus on enabling infrastructure. Uttar Pradesh, strategically located on the golden quadrilateral and boasting the largest rail network in India, is well-positioned to support the growing logistics industry. The state is connected to major national and international airports, including Lucknow, Allahabad, Gorakhpur, and Varanasi, enhancing its accessibility to markets. Additionally, the development of multi-city metro rail projects in Lucknow, Kanpur, Meerut, and Varanasi, along with upcoming international airports in Jewar and Kushinagar, further strengthens the state's connectivity advantage. The National Waterway-1 project, connecting Allahabad to Haldia, is expected to benefit the exporting hubs in eastern Uttar Pradesh, contributing to the state's long-term connectivity strategy .

In line with promoting sustainable practices, the policy emphasizes the use of electric and hybrid vehicles at Multimodal Transport & Logistics Parks, aligning with the global trend towards eco-friendly transportation solutions. Furthermore, the document highlights the importance of developing infrastructure amenities such as roads, drainage systems, power lines, and solar panels within logistics parks to support the efficient functioning of warehousing and logistics operations.

To incentivize investment in infrastructure development, the policy offers an Infrastructure Interest Subsidy in the form of reimbursement up to 5% per annum for five years on loans taken for infrastructural amenities, with a maximum cap of INR 1 crore per annum and an overall ceiling of INR 5 crore . This subsidy aims

to encourage the development of essential infrastructure within logistics parks, enhancing their attractiveness to potential investors and tenants.

Moreover, the policy emphasizes the importance of conducting regular studies and surveys to identify opportunities for enhancing logistics facilities along key transportation corridors such as the Western Dedicated Freight Corridor (WDFC), Eastern Dedicated Freight Corridor (EDFC), expressways (e.g., Agra-Lucknow Expressway, Purvanchal Expressway), and strategic locations like Bundelkhand area . By proactively assessing the needs and requirements of the logistics industry, the government aims to tailor its policies and initiatives to support the sector's growth and competitiveness.

In terms of incentivizing logistics and warehousing units, the policy ensures that units availing incentives from other government policies are also entitled to benefits under this policy, provided they are not duplicating benefits from multiple sources. This approach streamlines the incentive framework and prevents overlapping benefits, ensuring a fair and transparent system for all eligible entities.

The Uttar Pradesh Warehousing and Logistics Policy 2018 set a clear roadmap for enhancing the state's logistics infrastructure, promoting sustainable practices, and attracting investments to drive economic growth. By leveraging its strategic advantages, investing in critical infrastructure, and offering targeted incentives, Uttar Pradesh aims to position itself as a preferred destination for logistics and warehousing activities, contributing to the state's overall development and prosperity.

3.4.7 The Kerala State Logistics Action Plan 2021

The Kerala State Logistics Action Plan for September 2021 outlines the current state of the logistics sector in Kerala and provides strategic recommendations for enhancing efficiency and competitiveness. The plan focuses on key areas such as infrastructure, services, operating environment, funding sources, skilling, and

strategic initiatives. It also addresses the challenges faced by stakeholders and proposes solutions to drive growth and development in the logistics industry.

The policy highlights the importance of logistics in facilitating trade and economic growth. It emphasizes the need for a comprehensive action plan to address the existing gaps and capitalize on the state's potential as a logistics hub. The plan aims to streamline processes, reduce costs, and improve overall efficiency in the logistics ecosystem.

One of the key objectives of the Kerala State Logistics Action Plan is to provide industry status for logistics and increase allocations to support the sector. Stakeholders have emphasized the importance of easing regulations and compliance requirements to make it easier for businesses to operate across the country. The plan recognizes the need for policies that support the pan-India presence of logistics companies and enable them to manage multiple offices effectively.

The Policy also highlights the significance of the EXIM scenario in Kerala and its impact on the logistics sector. It identifies opportunities for growth in export-oriented industries and emphasizes the need for efficient transportation and warehousing facilities to support international trade. The plan recommends measures to enhance connectivity and reduce transit times to boost the state's export competitiveness.

In terms of transport modes, the plan focuses on improving middle-mile logistics to enhance connectivity between production and consumption centres. It suggests leveraging technology and data analytics to optimize routes and reduce transportation costs. The plan also emphasizes the importance of last-mile delivery solutions to ensure timely and efficient distribution of goods to end consumers.

Infrastructure development is a key aspect of the logistics action plan, with a focus on enhancing road networks, rail connectivity, and port facilities. The plan identifies specific projects for multi-laning roads and increasing tonnage capacity

to improve transportation efficiency. It also emphasizes the importance of geo-clustering to optimize logistics operations and reduce costs.

The Policy provides a detailed analysis of the LEADS ranking framework, which assesses infrastructure, services, and the operating environment in the logistics sector. It also highlights funding sources available for logistics projects and initiatives, as well as the importance of skilling programs to develop a skilled workforce in the industry.

Strategic initiatives outlined in the action plan include promoting intermodal transportation, implementing technology solutions for tracking and monitoring shipments, and enhancing collaboration between government agencies and private sector stakeholders. The plan also emphasizes the need for continuous monitoring and evaluation to ensure the successful implementation of proposed measures.

The Kerala State Logistics Action Plan for September 2021 offers a comprehensive roadmap for enhancing the efficiency and competitiveness of the state's logistics sector. By addressing key challenges, leveraging opportunities, and implementing strategic initiatives, Kerala can position itself as a leading logistics hub in the region. The plan underscores the importance of collaboration between government, industry, and other stakeholders to drive sustainable growth and development in the logistics ecosystem.

3.4.8 Chhattisgarh Logistics Park Policy 2018

The Chhattisgarh Logistics Park Policy 2018 aims to boost business development and ease of doing business in the state by providing essential factors like infrastructure, power, and a skilled labor pool. This policy encourages the establishment of logistics parks by offering various subsidies and incentives to eligible enterprises. The key objectives include promoting logistics services, creating employment opportunities, attracting investments, and reducing commerce costs. The policy period spans five years, from April 2018 to March 2023, with eligibility criteria specifying the types of enterprises that can establish logistics parks and the conditions they must meet.

Eligible enterprises, including proprietary firms, partnership firms, cooperative societies, limited liability companies, and company organizations, must have a minimum of 15 acres of land and a fixed capital investment of at least Rs. 15 crores. They are required to establish the logistics park within 30 months of acceptance and adhere to employment conditions favoring the domicile of Chhattisgarh. The logistics park components encompass various infrastructure elements like land, warehousing, power supply, water supply, and logistics services to ensure efficient operations.

The policy offers subsidies such as Fixed Capital Investment Subsidy and Interest Subsidy based on the size and location of the logistics park. It also provides exemptions in electrical duty, grants for technology purchase, and other financial assistance facilities. The logistics park must meet specific criteria to qualify for these benefits, including developing warehouse and related infrastructure as per defined standards and norms. The policy emphasizes the importance of utilizing skilled labor from Chhattisgarh and complying with the conditions outlined to receive the incentives.

In summary, the Chhattisgarh Logistics Park Policy 2018 is designed to enhance the logistics infrastructure in the state, attract investments, create employment opportunities, and facilitate the efficient movement of goods. By offering subsidies, incentives, and support for logistics park development, the policy aims to drive economic growth, improve trade efficiency, and establish Chhattisgarh as a prominent business destination.

3.4.9 Manipur Integrated Logistics Policy 2022

The Manipur Integrated Logistics Policy 2022 is a strategic initiative aimed at fostering integrated and holistic development within the logistics sector of Manipur. This policy, notified in conjunction with the B20 Conference hosted in Manipur, focuses on leveraging the state's unique geographical position as the Land Gateway of India to South East Asia. By capitalizing on this advantage, Manipur aims to enhance its connectivity with South East Asia, particularly through the completion of the Asian Highway within Myanmar, which will

significantly reduce travel time to destinations like Bangkok to just 16-18 hours. Additionally, plans are underway to introduce international flights from Imphal to Mandalay in Myanmar and Bangkok in Thailand, further enhancing regional connectivity.

The policy underscores the importance of promoting investment and ease of doing business in Manipur. To facilitate this, the state has adopted new Industrial and Investment Promotion Policies, including the Manipur Industrial Single Window Clearance Act, 2021, to streamline processes and attract investments. Recognizing the untapped potential in sectors like medicinal plants, horticultural products, aromatic plants, and spices, Manipur aims to capitalize on these resources to drive economic growth and development.

Moreover, the Manipur Integrated Logistics Policy aligns with the broader goal of enhancing the state's infrastructure and employment opportunities. By focusing on strengthening the logistics sector, Manipur aims to not only improve the ease of doing business but also generate substantial employment, enhance wages, and improve working conditions. The policy's emphasis on creating an efficient logistics ecosystem is expected to have a transformative impact on the state's economy, fostering growth and development across various sectors.

Furthermore, the policy's integration with national initiatives like the Gati Shakti Programme, Sagarmala, and Bharatmala schemes underscores Manipur's commitment to aligning its development strategies with broader national objectives. By leveraging these initiatives, Manipur seeks to enhance infrastructure connectivity, boost trade efficiency, and contribute to the overall economic progress of the region.

In conclusion, the Manipur Integrated Logistics Policy 2022 represents a comprehensive approach towards enhancing the state's logistics infrastructure, promoting investment, and fostering economic growth. By capitalizing on its strategic location, adopting investor-friendly policies, and aligning with national development initiatives, Manipur aims to position itself as a key player in the regional and international trade landscape, driving sustainable development and prosperity for its residents.

3.4.10 National Logistics Policy 2022

The National Logistics Policy 2022 aims to transform India's logistics sector by enhancing efficiency, reducing costs, and improving competitiveness. The policy focuses on key areas such as infrastructure development, technology adoption, skill development, and regulatory reforms to create a seamless and integrated logistics ecosystem. It emphasizes the importance of collaboration between various stakeholders including government agencies, industry associations, and state governments to achieve the desired outcomes.

Infrastructure development is a crucial aspect of the policy, with a focus on improving multimodal connectivity, developing logistics parks, and enhancing last-mile connectivity. The policy also emphasizes the need for technology adoption in logistics operations, including the use of digital platforms for tracking and monitoring shipments, implementing RFID technology for better inventory management, and leveraging data analytics for decision-making.

Skill development is another key focus area of the policy, with initiatives aimed at enhancing the capabilities of the workforce in the logistics sector. Training programs, certification courses, and skill development initiatives are proposed to ensure a skilled workforce that can meet the evolving demands of the industry.

Regulatory reforms play a significant role in the National Logistics Policy, with measures aimed at simplifying procedures, reducing documentation requirements, and streamlining regulatory processes. The policy proposes the establishment of a single-window clearance system for logistics operations to facilitate ease of doing business and reduce bureaucratic hurdles.

The policy also highlights the importance of sustainability in the logistics sector, with initiatives aimed at promoting green logistics practices, reducing carbon emissions, and enhancing energy efficiency. The adoption of eco-friendly technologies, the promotion of electric vehicles, and the development of green logistics infrastructure are some of the key measures proposed in the policy to promote sustainability.

The National Logistics Policy 2022 is a comprehensive framework that aims to transform India's logistics sector into a world-class ecosystem that is efficient, cost-effective, and sustainable. By focusing on infrastructure development, technology adoption, skill development, and regulatory reforms, the policy seeks to address the challenges faced by the logistics industry and unlock its full potential for driving economic growth and competitiveness.

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CHAPTER 4: DATA ANALYSIS

Having established the diverse State Logistics Policies of India through quantitative analysis, this chapter delves into the core objective of the research. An analysis of the data collected from all State Logistics Policies, representing a range of Different Parameters, has been done. The analysis will focus on a comparative examination of Logistics Policies of States in India, juxtaposed against the States Logistics Policies and National logistics Policy. By identifying discrepancies between Parameters, the aim is to understand the Parameters of the policies. This comparative approach will shed light on potential Parameters and their importance in the policy and policy making.

4.1 Methods of Quantitative Analysis.

There are four main methods of quantitative analysis: descriptive, correlational, quasi-experimental, and experimental analysis.

4.1.1 Descriptive Analysis:

This method primarily involves observation. The analyst observes the subject area, gathers data, and develops insights. The technical aspects here are minimal, focusing mainly on compiling and differentiating data. It measures variables and can sometimes establish relationships between them. Descriptive analysis is commonly used in case studies or to understand the current situation in the analyst's field of study. For instance, it can address questions like how teenagers respond to strict screen time reductions at home or what the unemployment patterns are in a country.

4.1.2 Correlational Analysis

This method establishes the relationship between multiple variables, quantifying how a change in one variable can affect others. As a type of descriptive analysis, its scope is limited to studying these relationships. For example, it might be used to understand how improvements in living standards correlate with increases in per capita income or how sales of a product increase when a new version of its

complementary product is introduced. Correlational analysis can be conducted using simple tools like Excel for small data sets.

4.1.3 Quasi-Experimental Analysis

Also known as causal-comparative analysis, this method evaluates data to establish cause-effect relationships between variables. It is more complex than descriptive and correlational analyses and often requires different study groups. This type of analysis explores why certain relationships exist between variables. Examples include studying how diverse decision-making groups perform better due to gender and cultural diversity or how the Russia-Ukraine conflict affects global consumption patterns.

4.1.4 Experimental Analysis

In this method, the analyst or experimenter starts by developing a hypothesis. Study groups with diverse participants are then formed. This method is highly complex and time-consuming, employing scientific approaches to test the hypothesis with large amounts of data and various inputs. Examples include proving a hypothesis that encouraging creativity in the workplace can enhance employee productivity.

4.2 Analysis.

We can leverage descriptive analysis to compare logistics policy parameters across Indian states. By compiling a list of all parameters mentioned in each policy and analyzing their frequency, we can gain insights into which parameters are most emphasized. Table of Parameters Identified and their frequency is given below.

	MAHARASHTRA	CHHATTISGARH	MADHYA PRADESH	ASSAM	RAJASTHAN(DRAFT)	GUJARAT	HIMACHAL	UTTARPRADESH	HARYANA	MIZORAM	MANIPUR	ODISHA	ANDHRA PRADESH	KERLA
VISION	1				1	1	1	1	1	1	1	1	1	1
AIM / OBJECTIVES	1	1	1	1	1	1	1	1	1	1	1	1	1	1
STRATEGY	1	1	1		1	1	1	1	1	1	1	1	1	1
TARGETS / MISSION	1	1	1		1	1	1	1	1	1	1	1	1	1
ELIGIBILITY	1	1	1		1	1	1	1	1	1	1	1	1	1
ELIGIBILITY CRITERIA FOR LP	1	1	1		1	1	1	1	1	1	1	1	1	1
FINANCE	1	1	1		1	1	1	1	1	1	1	1	1	1
CONTENTS OF LP	1	1	1		1	1	1	1	1	1	1	1	1	1
PROCEDURE FOR DEVELOPING LP	1	1	1		1	1	1	1	1	1	1	1	1	1
SUBSIDY	1	1	1		1	1	1	1	1	1	1	1	1	1
INCENTIVE	1	1	1		1	1	1	1	1	1	1	1	1	1
LOAN	1	1	1		1	1	1	1	1	1	1	1	1	1
PLANNING AUTHORITY	1	1	1		1	1	1	1	1	1	1	1	1	1
FSI	1	1	1		1	1	1	1	1	1	1	1	1	1
WAREHOUSE GROUND COVERAGE	1	1	1		1	1	1	1	1	1	1	1	1	1
ZONE RESTRICTION	1	1	1		1	1	1	1	1	1	1	1	1	1
SUPPLY CHAIN	1	1	1		1	1	1	1	1	1	1	1	1	1
COLD CHAIN SUPPLY	1	1	1		1	1	1	1	1	1	1	1	1	1
WAREHOUSE HEIGHT RESTRICTION	1	1	1		1	1	1	1	1	1	1	1	1	1
POWER CONSUMPTION	1	1	1		1	1	1	1	1	1	1	1	1	1
CRITICAL INFRA.	1	1	1		1	1	1	1	1	1	1	1	1	1
SECURITY GUARDS	1	1	1		1	1	1	1	1	1	1	1	1	1
SINGLE WINDOW CLEARANCE	1	1	1		1	1	1	1	1	1	1	1	1	1
LABOUR LAW	1	1	1		1	1	1	1	1	1	1	1	1	1
TECHNOLOGY INTEGRATION	1	1	1		1	1	1	1	1	1	1	1	1	1
STANDARDIZATION	1	1	1		1	1	1	1	1	1	1	1	1	1
EMPLOYMENT GENERATION	1	1	1		1	1	1	1	1	1	1	1	1	1
SKILL DEVELOPMENT	1	1	1		1	1	1	1	1	1	1	1	1	1
SEZ	1	1	1		1	1	1	1	1	1	1	1	1	1
ENVIRONMENT	1	1	1		1	1	1	1	1	1	1	1	1	1
LOCATIONAL ADVANTAGE	1	1	1		1	1	1	1	1	1	1	1	1	1
EXISTING INFRA.	1	1	1		1	1	1	1	1	1	1	1	1	1
LAST MILE CONNECTIVITY	1	1	1		1	1	1	1	1	1	1	1	1	1
ROAD SIDE AMENITIES	1	1	1		1	1	1	1	1	1	1	1	1	1
TRANSPORT INFRA.	1	1	1		1	1	1	1	1	1	1	1	1	1
GREEN LOGISTICS	1	1	1		1	1	1	1	1	1	1	1	1	1
LOGISTIC INFRA... / REQUIREMENT	1	1	1		1	1	1	1	1	1	1	1	1	1
INSTITUTIONAL FRAMEWORK	1	1	1		1	1	1	1	1	1	1	1	1	1
INTEGRATED COMMITTEE	1	1	1		1	1	1	1	1	1	1	1	1	1
SCHEMES	1	1	1		1	1	1	1	1	1	1	1	1	1
CENTRAL GOVT SCHEMES	1	1	1		1	1	1	1	1	1	1	1	1	1
LAW & ORDER	1	1	1		1	1	1	1	1	1	1	1	1	1
IMPACT ASSIGNMENT	1	1	1		1	1	1	1	1	1	1	1	1	1
POLICY	1	1	1		1	1	1	1	1	1	1	1	1	1
POLICY PERIOD & REVIEW	1	1	1		1	1	1	1	1	1	1	1	1	1
PM MASTER PLAN	1	1	1		1	1	1	1	1	1	1	1	1	1
LOGISTICS MASTERPLAN	1	1	1		1	1	1	1	1	1	1	1	1	1
DPC	1	1	1		1	1	1	1	1	1	1	1	1	1
AIR FREIGHT	1	1	1		1	1	1	1	1	1	1	1	1	1
TRADE FACILITATION CELL	1	1	1		1	1	1	1	1	1	1	1	1	1
LOGISTICS POLICY CELL	1	1	1		1	1	1	1	1	1	1	1	1	1
E-COMMERCE	1	1	1		1	1	1	1	1	1	1	1	1	1
STORAGE AND HANDLING FACILITIES	1	1	1		1	1	1	1	1	1	1	1	1	1
LEADS	1	1	1		1	1	1	1	1	1	1	1	1	1
INDUSTRY STATUS	1	1	1		1	1	1	1	1	1	1	1	1	1
QUALITY STORAGE FACILITIES	1	1	1		1	1	1	1	1	1	1	1	1	1
STANDARDIZATION	1	1	1		1	1	1	1	1	1	1	1	1	1
VEHICLE PURCHASE	1	1	1		1	1	1	1	1	1	1	1	1	1
INLAND WATERWAYS	1	1	1		1	1	1	1	1	1	1	1	1	1
	21	12	4	9	17	22	19	19	20	21	23	16	21	20

Figure 9- comparison of Logistics Policy

The most commonly used parameters in policy evaluation are single window clearance, skill development, and policy review and period. However, there are other important parameters that should also be considered to obtain comprehensive recommendations. These include a live institutional framework and locational advantages.

Single Window Clearance: This parameter focuses on streamlining the approval process by providing a single point of contact for all necessary permissions and clearances. It aims to reduce bureaucratic delays and make it easier for businesses to start and operate.

Skill Development: This parameter emphasizes the importance of training and educating the workforce to meet industry needs. It ensures that there is a pool of skilled labor available, which is crucial for the growth and competitiveness of various sectors.

Policy Review and Period: This involves the regular assessment and updating of policies to ensure they remain relevant and effective. It includes setting specific time frames for reviewing policies to adapt to changing circumstances and new information.

Live Institutional Framework: A robust institutional framework that is adaptive and responsive is essential for effective policy implementation. This framework includes the structures, mechanisms, and processes that govern policy execution and ensure accountability and transparency.

Locational Advantages: This parameter considers the geographical benefits that can influence the success of a policy. Factors such as proximity to markets, availability of resources, and infrastructural facilities are important in determining the locational advantages.

Additionally, it is essential to incorporate several other parameters into every policy to enhance its effectiveness:

Financial Statements: Detailed financial statements are necessary to evaluate the economic feasibility and impact of a policy. They provide insights into the costs, benefits, and financial sustainability of policy initiatives.

Critical Infrastructure and Logistics Master Plan: This parameter focuses on the development and maintenance of essential infrastructure and a comprehensive logistics plan. It ensures that there are efficient transportation networks, communication systems, and other critical infrastructure in place to support policy goals.

New Schemes: Introducing innovative schemes and programs can address specific issues and provide targeted support where needed. These schemes should be well-designed and aligned with the overall policy objectives.

Logistics Policy Cell: Establishing a dedicated logistics policy cell can help in the systematic planning, coordination, and implementation of logistics-related initiatives. This cell can also monitor progress and make necessary adjustments to improve logistics efficiency.

Standardization: Setting and adhering to standards ensures consistency, quality, and interoperability across different sectors and regions. Standardization can enhance the effectiveness of policies by providing clear guidelines and benchmarks.

Last Mile Connectivity: Ensuring last mile connectivity is crucial for the accessibility and inclusiveness of services and infrastructure. It addresses the challenges of reaching the final recipients or users, particularly in remote or underserved areas.

By integrating these parameters into policy-making, governments and organizations can develop more comprehensive, effective, and adaptable policies that better address the needs and challenges of various sectors.

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CHAPTER 5: BENEFITS OF MAKING LOGISTICS AS AN INDUSTRY

Granting Industry status to the logistics sector confers significant advantages, as it enables access to funding from financial institutions under favorable terms and qualifies for a range of fiscal and non-fiscal benefits akin to traditional industrial sectors. This designation aims to bolster the commercial viability of logistics projects and enhance the industry's cost competitiveness. By extending such privileges, states and Union Territories demonstrate a robust commitment to fostering the development and growth of the logistics sector in India. This proactive stance underscores the recognition of logistics as a vital pillar of economic activity, with the potential to drive substantial value addition and contribute significantly to overall national prosperity.

5.1 Formalizing logistics as an industry

Formalizing logistics as an industry encompasses several crucial measures aimed at optimizing operations and enhancing overall efficiency. Key Performance Indicators (KPIs) play a pivotal role in this process, serving as vital metrics for evaluating and continuously improving performance across various stages of the supply chain. Effective logistics management is essential, encompassing the procurement, movement, and storage of goods from their origin to the end consumer, ensuring seamless flow and timely delivery. Inventory management emerges as another critical aspect, necessitating the delicate balance of raw materials, work-in-progress, and finished goods to prevent stockouts or overstocking. Transportation and warehousing activities are integral components, facilitating the smooth movement of raw materials to manufacturing facilities and the efficient distribution of finished products to distributors, retailers, or end customers. Additionally, prioritizing customer satisfaction is paramount, ensuring that logistics operations align with consumer expectations and demands. Moreover, integrating sustainability measures into logistics practices is imperative, fostering environmentally conscious processes to minimize ecological

footprint and promote long-term viability. Collectively, these measures underscore the multifaceted approach required to establish logistics as a robust and sustainable industry, capable of meeting evolving market demands while driving economic growth.

5.2 Why is logistics not defined as an industry in India ?

There are some reasons that why Logistics is not Define as Industry in India

Fragmented Nature: The Indian logistics sector is fragmented, with numerous small and unorganized players.

Service-Oriented: Logistics is often seen as a service that supports other industries, rather than a standalone industry itself.

Focus on Modes: Transport planning traditionally focuses on specific transport modes like railways, roadways, or waterways.

However, the importance of logistics is increasingly recognized. Here's the shift happening:

Policy Initiatives: The government acknowledges the need for a robust logistics sector.

Industry Growth: The logistics sector in India is experiencing rapid growth. This growth is likely to lead to a stronger push for its independent recognition in planning.

5.3 Countries accepted Logistics as an industry

It's not as common for countries to explicitly define logistics as a separate industry within their national planning documents. This is likely due to the reasons mentioned previously - logistics being service-oriented and often integrated across various transport modes.

However, several countries recognize the strategic importance of a well-functioning logistics sector and integrate it into their planning frameworks. Here are some examples:

Member Countries of the Organization for Economic Cooperation and Development (OECD): The OECD frequently emphasizes the role of efficient logistics in boosting economic growth and competitiveness. Their reports and recommendations often address logistics planning alongside transport infrastructure development.

Singapore: Singapore, a global trade leader, prioritizes logistics efficiency. Their national plans likely integrate logistics considerations into broader infrastructure and economic development strategies.

Germany: Germany's focus on "Industry 4.0" (Fourth Industrial Revolution) highlights the importance of logistics for a technology-driven future. Their planning likely incorporates logistics aspects alongside technological advancements.

While a specific "logistics industry" designation might not be present, these examples show how countries acknowledge the critical role of logistics in their planning efforts.

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CHAPTER 6: RECOMMENDATIONS

6.1 Measure to make Logistics as an industry

Some steps India can take to elevate logistics from a supporting function to a recognized industry within its planning aspects:

6.1.1 Standardization and Data Collection:

Develop Logistics KPIs (Key Performance Indicators): Establish clear metrics to measure the efficiency and performance of the logistics sector. This data can then be used for informed planning decisions.

Standardize Data Collection: Ensure consistent data collection across all logistics stakeholders, including warehousing, transportation, and technology providers. This will create a comprehensive picture of the sector's health.

6.1.2 Skill Development and Recognition:

Create Logistics-Specific Job Roles: Formalize logistics professions with defined skill sets and career paths. This will attract talent and elevate the industry's image.

Develop Training Programs: Offer specialized education and training programs to equip the workforce with the latest logistics knowledge and technologies.

6.1.3 Integration into Planning Frameworks:

Logistics Master Plan: Develop a national logistics master plan that integrates logistics considerations into broader infrastructure and economic development strategies.

State-Level Logistics Plans: Encourage states to create their own logistics plans that address regional needs and complement the national plan.

6.1.4 Industry Advocacy:

Strengthen Logistics Associations: Empower logistics industry associations to play a more significant role in policy discussions and planning processes.

Promote Awareness: Raise awareness among policymakers and the public about the critical role of logistics in economic growth and job creation.

6.1.5 Public-Private Partnerships:

Government-Industry Collaboration: Foster collaboration between the government and private sector to invest in logistics infrastructure, technology, and skill development.

By implementing these steps, India can move towards a more holistic approach to logistics planning. This will not only elevate the industry's status but also create a more efficient and competitive logistics ecosystem that benefits businesses and consumers nationwide.

6.2 Key Recommendations From reviewed States Logistics Policies

The '7 Cs of Supply Chain Management' are crucial for a successful supply chain. They include Connect (establishing a strong network of suppliers and customers), Create (developing efficient and effective processes), Customize (tailoring solutions to meet specific needs), Coordinate (ensuring smooth operations across the supply chain), Consolidate (combining resources to improve efficiency), Collaborate (working together with partners to achieve common goals), and Contribute (adding value to the overall supply chain).

A successful logistics policy incorporates the concepts of Product, Price, Place, Promotion, and People. This allows logistics executives to market their services effectively. The right product should be delivered at the right price, to the right place, promoted well, and handled by skilled people.

The '7 Rs in Logistics' are fundamental to the industry. It involves getting the Right product, in the Right quantity, in the Right condition, at the Right place, at

the Right time, to the Right customer, at the Right price. Adhering to these principles ensures customer satisfaction and operational efficiency.

The policy period, laws, and order, along with the interval of policy review, form the framework for stakeholder engagement. Regular reviews ensure that the policy remains relevant and effective.

Every policy must include financial statements covering subsidies, loans, and incentives. This transparency helps stakeholders understand the financial implications and benefits of the policy.

Zone specification is important as it outlines the geographical areas where the policy applies. Each zone may have its advantages and disadvantages, which need to be considered when formulating the policy.

The policy must include details of existing and proposed infrastructure. This helps in planning for future growth and understanding the current capacity.

A dedicated authority for planning, managing, implementing, and reviewing the policy is essential. This ensures accountability and effective execution of the policy.

Labour laws and skill development play a crucial role in a country's GDP and economy. A policy should therefore consider these aspects to ensure a skilled workforce and adherence to legal requirements.

Eligibility criteria and standardization are important in warehousing, logistics parks, and integrated logistics parks. These ensure quality control and set a benchmark for operations.

Vertical procurement and last-mile connectivity are important factors in transportation and urban freight. These aspects ensure efficient delivery of goods to the final destination.

These recommendations can significantly improve the effectiveness of a logistics policy. They ensure that the policy is comprehensive, considers all relevant factors, and is geared towards improving efficiency and customer satisfaction.

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APPENDICES

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Appendix 1- Sheet 1

Revisiting Logistics Policy Across the States in India

Contextual Background

The Indian logistics market is estimated to be worth around **\$215 billion** in the next two years compared to **\$160 billion**.

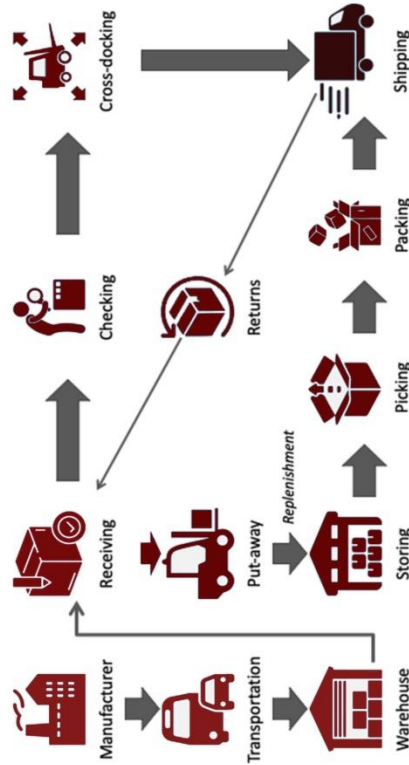
It was estimated that this market would grow to **563 billion** dollars in 2030, at a compound annual growth rate of **9.4 percent**.

National Logistics Policy (NLP) aims to lower the cost of logistics from the existing **13-14%** and lead it to par with other developed countries and to make the logistics industry more efficient and lower its costs.

The Prime Minister's initiative, **PM Gati-Shakti**, also known as the National Master Plan for multi-modal connectivity, was introduced in year 2022, was an essential first step.

Various states in India have also implemented their own logistics policies to address state-specific challenges and opportunities

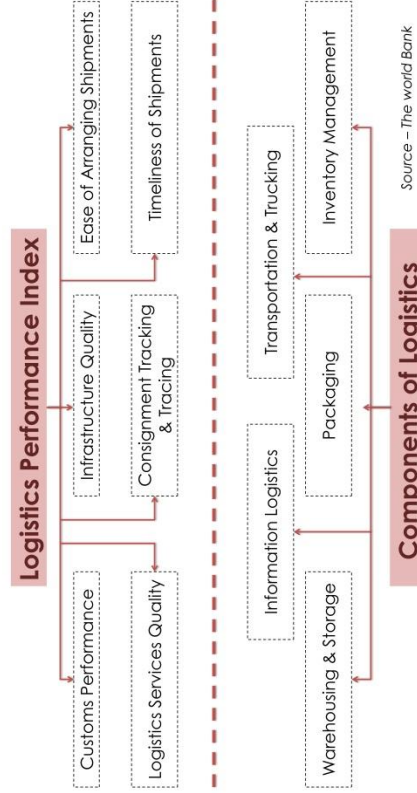
Logistics Process Flow



Logistics Performance Index

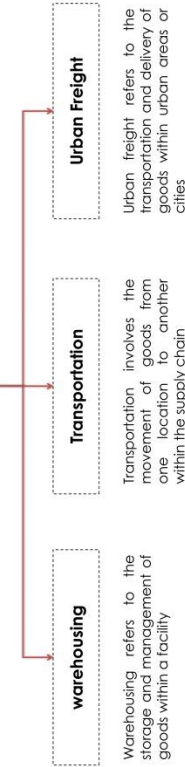
Interactive benchmarking tool developed by the World Bank Group.

It helps countries identify the challenges and opportunities they face in their performance of trade logistics and what they can do to improve their performance.



Source – The world Bank

Logistics Supply Chain



Appendix 3- Sheet 2

Revisiting Logistics Policy Across the States in India

Aim

To provide **recommendations for future policy-making** to ensure improvement of India's logistics infrastructure.

Objective

- To Evaluate the Current State of Logistics policy.
- Comparison between logistics policy of different states.
- To Identify parameters of logistics policies of different states.
- To identify the logistics as an industry.

Scope

- Comparison of logistics policies and infrastructure.
- Understanding how logistics policies directly affect business operations.
- Explore current state of technology integration in logistics.
- Environmental impact of current logistics practices in various states.

Limitation

- Logistics policies and their impacts can vary significantly across different states due to geographical, economic, and infrastructural differences.
- If research involves interviews or surveys, the responses can be subjective and might not accurately represent the overall scenario.
- Since many state logistics policies are still in draft stages, data availability may be limited. Once finalized, data collection can provide insights into policy effectiveness

Four Pillars of Logistics Policy

Integration of Digital System (IDS)

Unified Logistics Interface Platform (ULIP)

Ease of Logistics (ELOG)

System Improvement Group (SIG)

Literature Review

Title of the Paper, Year of Publication & Authors	Journal Name	Takeaways
Freight Traffic Impacts and Inefficiencies in India: Policy Interventions and Solution Concepts for Sustainable City Logistics (2022) Prasanta K. Sahu	springer	Findings - Currently, more than a third of global transport energy consumption (39%) is generated by freight movements; trucking is responsible for 23%, followed by marine vessels, which are responsible for 12%, and rail and pipelines, which are responsible for 4%. Gap Identified - Unbalanced Modal Mix and Growth in Road Freight
India - On the Cusp of a Logistics Revolution (2018)	Deloitte (firm)	Findings - India was ranked 35th in The World Bank LPI Index that ranks countries based on their logistics performance — moving up from 54th in 2014. Gap Identified – There is no robust Logistic sector in India.
The Logistics Sector in India: Overview and Challenges (2007) Pankaj Chandra, Nimit Jain	Research-Gate	Findings - The transportation industry is highly fragmented, consisting of numerous independent players with small fleets. Gap Identified – There is no common platform for all fleet operators to interact and have common decision.

Research question

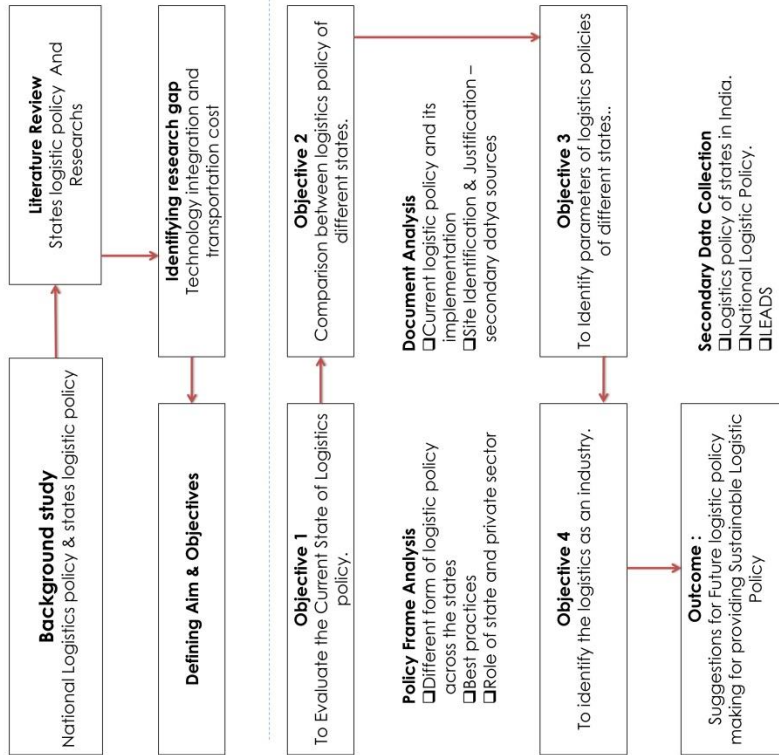
Why is India lagging in logistic sector; why we are not compatible with ITS ? and why logistics is taking to long to form as an industry in India ?



Appendix 4- Sheet 3

Revisiting Logistics Policy Across the States in India

Methodology



Timeline for Logistics policy

2012	Madhya Pradesh Warehousing and logistics policy Government of Madhya Pradesh
2012	Uttar Pradesh Warehousing & logistic policy 2022 Uttar Pradesh Warehousing and Logistics Policy 2022 Government of Uttar Pradesh
2018- 2023	Chhattisgarh State Logistic Park policy Department of commerce and industries, govt. of Chhattisgarh
2018	Maharashtra logistic park policy Govt. Of Maharashtra department of industries
2019	Haryana Logistics, Warehousing & Retail Policy Industries & Commerce Department, Haryana
2021	KERALA STATE LOGISTICS ACTION PLAN KERALA INDUSTRIAL INFRASTRUCTURE DEVELOPMENT CORPORATION
2021	Gujarat Integrated Logistics & Logistics park policy Gujarat Infrastructure Development Board
2022	NATIONAL LOGISTICS POLICY MINISTRY OF COMMERCE AND INDUSTRY (Department for Promotion of Industry and Internal Trade)
2022	Rajasthan Logistics, warehousing and Logistic park policy (Draft) Govt. of Rajasthan
2022	Assam logistic and warehousing policy Industries, Commerce & Public Enterprise Department, Assam
2022	Himachal Pradesh Logistics Policy Govt. of Himachal Pradesh
2022	The Mizoram State Logistics Policy Department of commerce and industries, Mizoram
2022	Manipur Integrated logistics policy Department of Textile commerce and industries, Manipur commerce and transport department, Odisha
2022	Odisha logistics policy commerce and transport department, Odisha
2022	Andhra Pradesh Logistics Policy Industries of commerce department, Andra Pradesh
2023	INTEGRATED LOGISTICS & LOGISTICS PARK POLICY Department Of Industries and Commerce
2023	SMART URBAN FREIGHT AND CITY LOGISTICS Directorate of Urban Land Transport Urban Development Department, Govt. of Karnataka
2023	CITY LOGISTIC PLAN Prayagraj Draft Final Report Prayagraj Development Authority

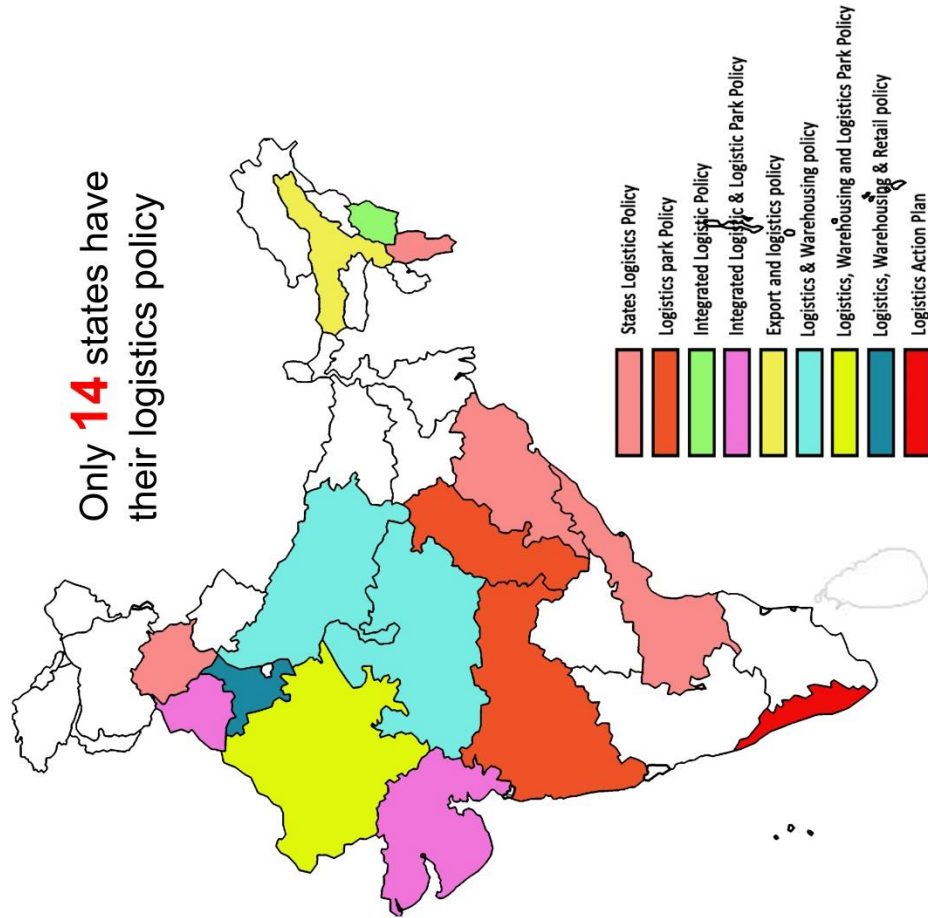
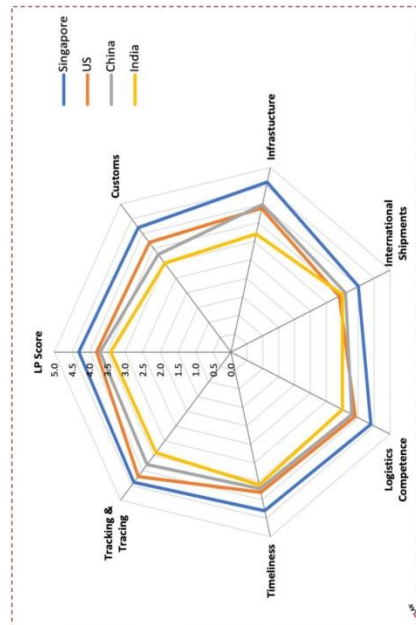


Appendix 5- Sheet 4

Revisiting Logistics Policy Across the States in India

Current State of Logistics Policy

- There are different ministries involved in the logistics are Ministry of Commerce and Industry, Ministry of Road Transport and Highways (MoRTH), Ministry of Civil Aviation, Ministry of Railways, Directorate General of Foreign Trade (DGFT), Various State Governments. There is no such unified ministry or platform for logistics.
- India ranks 38 out of 139 countries. India's rank has improved by six places from 44 in 2018 and sixteen places from 54 in 2014. (Logistics Performance Index).
- The LP score aggregates six attributes: Customs, Infrastructure, International shipments, Logistics competence, Tracking and Tracing, and Timeliness.
- Out of 28 States and 8 Union territories 14 states have their own Logistics Policy and 7 states have their draft policy rest of the states are drafting their policy.



Map—India map with states having logistic policy



Appendix 6- Sheet 5

Revisiting Logistics Policy Across the States in India

States logistic Policy Comparison

	MAHARASHTRA	CHHATTISGARH	MADHYA PRADESH	ASSAM	RAJASTHAN (DRAFT)	GUJARAT	HIMACHAL	UTTARPRADESH	HARYANA	MIZORAM	MANIPUR	ODISHA	ANDHRA PRADESH	KERLA	
VISION	1	1	1	1	1	1	1	1	1	1	1	1	1	1	9
AIM / OBJECTIVES	1	1	1	1	1	1	1	1	1	1	1	1	1	1	14
STRATEGY	1	1	1	1	1	1	1	1	1	1	1	1	1	1	3
TARGETS / MISSION	1	1	1	1	1	1	1	1	1	1	1	1	1	1	7
ELIGIBILITY CRITERIA FOR LP	1	1	1	1	1	1	1	1	1	1	1	1	1	1	5
FINANCE	1	1	1	1	1	1	1	1	1	1	1	1	1	1	2
PROCEDURE FOR DEVELOPING LP	1	1	1	1	1	1	1	1	1	1	1	1	1	1	5
SUBSIDY	1	1	1	1	1	1	1	1	1	1	1	1	1	1	2
INCENTIVE	1	1	1	1	1	1	1	1	1	1	1	1	1	1	4
PLANNING AUTHORITY	1	1	1	1	1	1	1	1	1	1	1	1	1	1	3
ESI	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
WAREHOUSE GROUND COVERAGE	1	1	1	1	1	1	1	1	1	1	1	1	1	1	4
ZONE RESTRICTION	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
SUPPLY CHAIN	1	1	1	1	1	1	1	1	1	1	1	1	1	1	3
COLD CHAIN SUPPLY	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
WAREHOUSE HEIGHT RESTRICTION	1	1	1	1	1	1	1	1	1	1	1	1	1	1	4
POWER CONSUMPTION	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
CRITICAL INFRA.	1	1	1	1	1	1	1	1	1	1	1	1	1	1	6
SECURITY GUARDS	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
SINGLE WINDOW CLEARANCE	1	1	1	1	1	1	1	1	1	1	1	1	1	1	10
LABOUR LAW	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
TECHNOLOGY INTEGRATION	1	1	1	1	1	1	1	1	1	1	1	1	1	1	6
STANDARDIZATION	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
EMPLOYMENT GENERATION	1	1	1	1	1	1	1	1	1	1	1	1	1	1	4
SKILL DEVELOPMENT	1	1	1	1	1	1	1	1	1	1	1	1	1	1	10
SEA	1	1	1	1	1	1	1	1	1	1	1	1	1	1	3
ENVIRONMENT	1	1	1	1	1	1	1	1	1	1	1	1	1	1	4
LOCATIONAL ADVANTAGE	1	1	1	1	1	1	1	1	1	1	1	1	1	1	8
EXISTING INFRA.	1	1	1	1	1	1	1	1	1	1	1	1	1	1	5
LAST MILE CONNECTIVITY	1	1	1	1	1	1	1	1	1	1	1	1	1	1	6
ROAD SIDE AMENITIES	1	1	1	1	1	1	1	1	1	1	1	1	1	1	5
TRANSPORT INFRA.	1	1	1	1	1	1	1	1	1	1	1	1	1	1	6
GREEN LOGISTICS	1	1	1	1	1	1	1	1	1	1	1	1	1	1	4
LOGISTIC INFRA... / REQUIREMENT	1	1	1	1	1	1	1	1	1	1	1	1	1	1	6
INSTITUTIONAL FRAMEWORK	1	1	1	1	1	1	1	1	1	1	1	1	1	1	8
INTEGRATED COMMITTEE	1	1	1	1	1	1	1	1	1	1	1	1	1	1	2
SCHEMES	1	1	1	1	1	1	1	1	1	1	1	1	1	1	2
CENTRAL GOVT SCHEMES	1	1	1	1	1	1	1	1	1	1	1	1	1	1	2
LAW & ORDER	1	1	1	1	1	1	1	1	1	1	1	1	1	1	2
IMPACT ASSESSMENT	1	1	1	1	1	1	1	1	1	1	1	1	1	1	2
POLICY PERIOD & REVIEW	1	1	1	1	1	1	1	1	1	1	1	1	1	1	11
PII MASTER PLAN	1	1	1	1	1	1	1	1	1	1	1	1	1	1	2
LOGISTICS MASTERPLAN	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
DFC	1	1	1	1	1	1	1	1	1	1	1	1	1	1	8
AIR FREIGHT	1	1	1	1	1	1	1	1	1	1	1	1	1	1	3
TRADE FACILITATION CELL	1	1	1	1	1	1	1	1	1	1	1	1	1	1	5
LOGISTICS POLICY CELL	1	1	1	1	1	1	1	1	1	1	1	1	1	1	2
E-COMMERCE	1	1	1	1	1	1	1	1	1	1	1	1	1	1	3
STORAGE AND HANDLING FACILITIES	1	1	1	1	1	1	1	1	1	1	1	1	1	1	6
LEADS	1	1	1	1	1	1	1	1	1	1	1	1	1	1	6
INDUSTRY STATUS	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
QUALITY STORAGE FACILITIES	1	1	1	1	1	1	1	1	1	1	1	1	1	1	6
STANDARDIZATION	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
VEHICLE PURCHASE	1	1	1	1	1	1	1	1	1	1	1	1	1	1	2
INLAND WATERWAYS	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
	21	12	4	9	17	22	19	19	20	21	23	16	21	20	2



Appendix 7- Sheet 7

Revisiting Logistics Policy Across the States in India

Broad View of States Logistics Policy

- Gujarat Integrated Logistics and Logistics Park Policy 2021**
- 8% To National GDP
 - #1 LEADS Index
 - 13% GDP CARG
 - #1 IEM's
 - 1600 km long coastline
 - 1 major and 48 minor ports
 - State handles 40% of country's cargo amounting to 514 million tones.
 - Delhi Mumbai Industrial Corridor (DMIC) and Western Dedicated Freight Corridor- Nearly 560 km of DFC passes through the state, logistics parks have been planned to enhance rail-based traffic.
 - Ahmedabad Dholera Expressway- Proposed to connect Dholera SIR and Dholera International Airport to Ahmedabad.
 - Development of 11 jetties, many more are planned.
 - 7 Rail connectivity projects have been proposed providing connectivity to industrial areas.
 - 23% India's Exports during April 2020
 - Development and augmentation of logistics facilities across the state
 - Strengthening first & last mile connectivity
 - Promote technology and innovation in logistics
 - Promoting Skill Development
 - Work towards sustainability and decarbonizing the sector
 - Institutional framework for implementation of the policy.
 - Incentive & interventions identified for the policy

- Maharashtra's Logistics Parks Policy 2018**
- Eligibility for establishment of Logistic Park
- Private landowner or developer appointed by them or any Company with legal entity.
 - Lease Owners of MIDC Land with minimum 30 years of balance lease period of MIDC will be eligible for establishment of Logistic Parks
 - Activities constituting a Logistic Parks
 - Logistics services
 - Infrastructure
 - Business and commercial facilities
 - Common Facilities
 - Procedure for Development of Logistic Parks Directions for setting up of logistic park will be given under section 154 of Maharashtra Regional & Town Planning Act, 1966. Integrated Logistics Park
 - MIDC shall be declared as the Special Planning Authority for the development of Integrated Logistic Parks across the State.
 - Up to 200% Additional FSI for Integrated Logistics Park & Logistics Park.
 - Integrated logistic parks shall be allowed higher ground coverage up to 75%.
 - Maximum height of the building will be admissible up to 24 meters
- Integrated and Co-ordinated approach**
- Additional Chief Secretary/ Principal Secretary (Industry)
 - Principal Secretary (Public Works Department)
 - Maharashtra Industrial Development Corporation (MIDC).
 - Principal Secretary /Secretary (Transport)
 - Principal Secretary (UD-1)
 - Principal Secretary (Energy)
 - Principal Secretary (Skill Development)
 - Development Commissioner (Industries) as Member Secretary

- Rajasthan Logistics, Warehousing and Logistics Park Policy - 2022**
- Rajasthan shares an international border with Pakistan and the State border with five other States of India (Punjab, Haryana, Uttar Pradesh, Madhya Pradesh, and Gujarat).
 - Rajasthan provides connectivity between Northern & Western India with support of Major Road & Rail projects which pass through the State.
- Delhi-Mumbai Industrial Corridor (DMIC) in Rajasthan

Bharatmala Economic Corridors in Rajasthan

Delhi - Mumbai Expressway in Rajasthan

Special Economic Zones (SEZ) in Rajasthan

Inland Container Depots (ICD) in Rajasthan
- Ease of doing Business**
- Launching 'RAJNIVESH': a one-stop-shop with IT for seamless processes
 - Creation of a dedicated logistics division within the Department of Industries and Commerce
 - Assessment of departmental regulations for Logistics, Warehouse, and Logistics Park sectors
 - Support for Development of Logistics & Warehousing Sector.
 - Strengthening of Logistics and Warehousing Infrastructure
 - Fiscal Incentives
 - Rajasthan Logistics, Warehousing and Logistics Park Policy Monitoring Committee
 - Policy Implementation The Department of Industries and Commerce shall act as the nodal coordinating, monitoring and implementing department.
- Gross State Domestic Product**
- GSDP (in INR Lakh Crore)

Year	GSDP (INR Lakh Crore)
2016-17	5.57
2017-18	6.25
2018-19	6.51
2019-20	6.88
2020-21	6.44

GSDP Growth rate in %

Year	GSDP Growth rate in %
2016-17	-11.61
2017-18	8.95
2018-19	-11.24
2019-20	8.38
2020-21	-9.53
2021-22	4.71
2022-23	-4.94
2023-24	-5.03



Appendix 8- Sheet 8

Revisiting Logistics Policy Across the States in India		
<p>Broad View of States Logistics Policy</p>	<p>Haryana Logistics, Warehousing and Retail Policy - 2019</p> <ul style="list-style-type: none"> <input type="checkbox"/> Creation of at least 5 LP by private sector. <input type="checkbox"/> Employment generation up to 25000 and generation of hubs in major town. <input type="checkbox"/> Logistic park area bifurcation. <input type="checkbox"/> Cold chain facility <input type="checkbox"/> Retail enterprise / Retail hub <p>Logistics & Warehousing</p> <ul style="list-style-type: none"> <input type="checkbox"/> Locational advantage 60 % of area is covered with DMIC, AKIC <input type="checkbox"/> Faridabad – Palwal industrial area in close proximity of DFC. <input type="checkbox"/> 1710 railway route, 39/1000 sqkm rail route density (with road) <input type="checkbox"/> 29 State highway and 15 National Highway <p>Existing Ecosystem</p> <ul style="list-style-type: none"> <input type="checkbox"/> 9 ICD, 3 Container Freight Station, private Freight Terminal, <input type="checkbox"/> 33 functional logistics & warehousing units (10 lakh TEU) 	<ul style="list-style-type: none"> <input type="checkbox"/> Haryana Enterprise Promotion Policy (EPP 2015) <input type="checkbox"/> Maha Nivesh Yojana supports small logistics unit. <input type="checkbox"/> Fiscal incentive <ul style="list-style-type: none"> Capital Subsidy Stamp duty 100% reimbursement Electricity Duty Special Package of incentive <input type="checkbox"/> Single window clearance <input type="checkbox"/> Employment type/time (specially women) <input type="checkbox"/> Warehousing cum retail in agriculture zone (10 acer land) <input type="checkbox"/> Operational hours (store) <ul style="list-style-type: none"> <input type="checkbox"/> PPP Modal largest logistics hub in north India. <input type="checkbox"/> JV in MMLH (HSIDC & DMIC) <input type="checkbox"/> Truckers way side amenities <input type="checkbox"/> Logistics zone KMP express way <input type="checkbox"/> Last mile connectivity <input type="checkbox"/> Workers amenity
	<p>Madhya Pradesh Logistics and Warehousing Policy 2012</p> <p>#1</p> <p>State to have a dedicated policy targeting logistics and warehousing in INDIA</p> <p>State to have a PPP based Multi Modal Logistics Park under the umbrella of the MPLWP 2012</p> <p>Composite Logistics Hub Project, Pawarkheda, Hoshangabad, MP Area- 115 Acre Phase I- 88.3 Acres</p> <ul style="list-style-type: none"> <input type="checkbox"/> Warehouses- 21500 MT (to be increased) <input type="checkbox"/> Cold Storage- 2600 MT (to be increased) <input type="checkbox"/> Cargo- 2500 MT handling cap. <input type="checkbox"/> 12 railway sidings <input type="checkbox"/> Cold storage proposed- 1400 MT Processing units of flour, maida, pulses, potato chips, etc. <input type="checkbox"/> Estimated Cost- 138.5 Cr. <p>Incentives (Long Term)</p> <ul style="list-style-type: none"> <input type="checkbox"/> 10% land reservation for warehousing in proposed greenfield industrial estates/clusters <input type="checkbox"/> Approval of warehouse setup in existing clusters based on demand, land availability, and connectivity <input type="checkbox"/> Identification of minimum 50 acres of land in 10 districts as 'warehousing zones' <input type="checkbox"/> Long-term lease at small scale industrial unit rates for new warehouse locations <input type="checkbox"/> Single window clearance through TRIFAC for all proposals/projects under this policy <p>Early Bird Incentives (Short Term)</p> <ul style="list-style-type: none"> <input type="checkbox"/> Capital subsidy of 15% for projects over INR 1 Cr investment, capped at INR 2.25 Cr for infrastructure, targeting 50,000 MT warehousing capacity. <input type="checkbox"/> New warehousing projects above INR 1 Cr investment eligible for 5% p.a. interest subsidy on term loan for 71 years. <input type="checkbox"/> Expansion projects with INR 1 Cr investment treated as new, applicable to units licensed before policy publication. 	
		<p>National Logistics Policy (NLP) 17th September 2022</p> <p>Implementation of NLP through CLAP</p> <p>Comprehensive Logistics Action Plan (CLAP)</p> <ul style="list-style-type: none"> <input type="checkbox"/> Integrated Digital logistics system <input type="checkbox"/> Standardization of physical asset & benchmarking service quality standards <input type="checkbox"/> Logistics human resource development & capacity building <input type="checkbox"/> State engagement & EXIM logistics <input type="checkbox"/> Service improvement framework <input type="checkbox"/> Sectorial plan for efficient logistics and facilitation of development of logistics park <p>Unified Logistics Interface Platform (ULIP)</p> <p>Three key components defining the ULIP platform</p> <ul style="list-style-type: none"> <input type="checkbox"/> Integration with existing data sources of ministries <input type="checkbox"/> Data exchange with private players <input type="checkbox"/> Unified document reference in the supply chain



Appendix 9- Sheet 9

Revisiting Logistics Policy Across the States in India

Logistics as an Industry

- 21 states and 2 Union Territories (UTs) have notified their respective Logistics Policies
- 15 states and 1 UT have granted Industry status to the logistics sector
- Assam, Gujarat, Kerala, Odisha, and Tamil Nadu have designated Logistics as a Priority sector

Benefits of Making Logistics as an Industry

- Granting Industry status enables the logistics sector to access funding from financial institutions under favorable terms and makes it eligible for various fiscal and non-fiscal benefits similar to traditional industrial sectors.
- Enhance the commercial viability of logistics projects and improve the industry's cost competitiveness. It reflects the strong commitment of states and UTs towards the development and growth of the logistics sector in India.

Forming logistics as an industry involves several key measures:

- Key Performance Indicators: These are essential for measuring and improving performance in various stages of the supply chain.
- Logistics Management: This involves the procurement, movement, and storage of goods, starting at the product's origin and ending with the consumer.
- Inventory Management: Balancing the stock of raw materials, work-in-progress, and finished goods is crucial
- Transportation and Warehousing involve moving raw materials to the manufacturing facility and delivering finished products to distributors, retailers or customers
- Customer Satisfaction
- Sustainability Measures

Why is logistics not defined as an industry in India ?

- Fragmented Nature:** The Indian logistics sector is fragmented, with numerous small and unorganized players.
- Service-Oriented:** Logistics is often seen as a service that supports other industries, rather than a standalone industry itself.
- Focus on Modes:** Transport planning traditionally focuses on specific transport modes like railways, roadways, or waterways. However, the importance of logistics is increasingly recognized. Here's the shift happening:
- Policy Initiatives:** The government acknowledges the need for a robust logistics sector.
- Industry Growth:** The logistics sector in India is experiencing rapid growth. This growth is likely to lead to a stronger push for its independent recognition in planning.

Countries accepted Logistics as an industry?

- Countries often don't explicitly define logistics as a separate industry in national planning documents.
- Reasons include the service-oriented and integrated nature of logistics across various transport modes.
- Several countries, such as OECD (Organization for Economic Co-operation and Development) member countries, prioritize logistics in their planning frameworks for economic growth and competitiveness.
- Singapore, known for its focus on logistics efficiency, and Germany, which emphasizes logistics in its Fourth Industrial Revolution initiatives.



Appendix 10- Sheet 10

Revisiting Logistics Policy Across the States in India

Measure to make Logistics as an industry?

Standardization and Data Collection

Develop Logistics KPIs (Key Performance Indicators)

Standardize Data Collection

Skill Development and Recognition

Create Logistics-Specific Job Roles

Develop Training Programs

Integration into Planning Frameworks

Logistics Master Plan

State-Level Logistics Plans

Industry Advocacy

Strengthen Logistics Associations

Promote Awareness

Public-Private Partnerships

Government-Industry Collaboration

Recommendations for future policy-making

The '7 CS of supply chain management' Create, Customize, Collaborate and Contribute

7 R's IN Logistics
Getting the Right product, in the Right quantity, in the Right condition, at the Right place, at the Right time, to the Right customer, at the Right price

Every policy must include the financial statements, REVENUE, GOVERNMENT subsidy, loan, incentive

It must include the existing and proposed infrastructure

Labour laws and skill development plays an important role in countries GDP and economy

Vertical procurement last mile connectivity are the important factors in transportation and urban freight

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	Student Paper	<1 %
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