



Role of Uttar Pradesh in Shaping India's Logistics Performance

Joining Dots • Connecting People • Shared Prosperity

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Logistics is a key service for the conduct of trade. Logistics is also a major contributor to the inclusive growth of society and businesses. Two major initiatives taken by the Government of India to improve the logistics ecosystem in India are the National Logistic Policy launched in September 2022, and PM Gati Shakti Master Plan launched in October 2021. These two initiatives are expected to reshape the logistics landscape in India and lower the cost of logistics from its current 14 percent of GDP to less than 10 percent in the coming years. States in India have a crucial role to play in this.

This Briefing Paper examines the connectivity and logistics scenario in Uttar Pradesh in terms of trade (both domestic and international). The paper also identifies bottlenecks to logistics efficiency and explores the scope and opportunities that could emerge from the improved logistics performance of the state.

Background

Logistics, defined as the network of services that support the physical movement of goods, trade across borders, and commerce within borders, is a vital, enabling service for domestic and international trade. Efficiencies in logistics enhance the economy's overall competitiveness and contribute towards inclusive growth of society and businesses, including the micro, small and medium enterprises (MSMEs), farmers, etc.

India has improved its Logistic Performance Index (LPI) rank over time. It has the scope to further enhance its logistics services by optimising border procedures (i.e. speed, simplicity and predictability

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of formalities), reducing clearance time, and improving infrastructure quality (e.g. improving roads, rail and ports, developing intermodal hubs, digitisation and technological advancements).

The PM Gati Shakti Master Plan for Multi-modal Transport Connectivity and the National Logistics Policy (NLP) launched by the Government of India in 2021 and 2022 are two important steps in that direction. While the PM Gati Shakti Master Plan seeks to build holistic infrastructure through increased coordination among centre and state agencies; the NLP outlines national priorities for the logistics sector; provides a unified policy environment, and will serve as a key policy instrument to deliver the vision of 'Atmanirbhar Bharat'. The two can potentially result in a paradigm shift in the functioning of the logistics sector in India.

The states in India play a crucial role in integrating domestic and international transportation corridors. Therefore, to achieve the goals laid down in the NLP and the Gati Shakti Master Plan, it is vital that states, especially those situated in strategic locations, align their logistic plan as per the national and international logistic demand. By doing so, states can improve their logistic ecosystem and create investments and employment opportunities, besides enhancing their trade potential.

Given this background and to understand the potential of the evolving logistics ecosystem of India, it is important to understand the existing logistics ecosystem of states and the scope for improvement in trade (both domestic and international). Also, bottlenecks towards improving its logistic landscapes, initiatives to strengthen the logistic ecosystem and identifying the scope and opportunities that could emerge from the improved logistics performance of states.

This Briefing Paper is an attempt to understand logistics ecosystem and potential of Uttar Pradesh, the fourth largest and one of the most populous states in India with a population of nearly 200 million people, to facilitate transport connectivity among a number of states within India and beyond.

Overview of Connectivity and Logistic Initiatives in Uttar Pradesh

Snapshot of Transport Infrastructure and Connectivity

Uttar Pradesh is a landlocked state and surrounded by Bihar in the East; Madhya Pradesh in the South; Rajasthan, Delhi and Haryana in the West; and Uttarakhand and Himachal Pradesh in the Northwest; Chhattisgarh and Jharkhand on the southeast and shares an international border with Nepal in the North (IBEF, 2021B).

Uttar Pradesh is among the top five manufacturing states in India and one of the major exporting states in India. The state is interconnected with other states through rail, road, air and inland waterways. It is located on the golden quadrilateral; Eastern and the Western Freight Corridors and several other industrial corridors passing through the state (Exim Bank of India, 2021). Given this, the logistic ecosystem in this state not only affects the internal movement of people and goods, it also plays a crucial role in facilitating the movement of people and goods across states, and India's trade with neighboring countries, including Nepal.

Uttar Pradesh is connected to nine other Indian states through roads, rail, inland waterways and air. 48 national highways pass through the state connecting it to other states. Additionally, in November 2020, the Ministry of Road transport and Highways laid the foundation stone of 16 highway projects worth Rs. 7,477 crores (US\$1.06bn) in Uttar Pradesh (IBEF, 2021 A).



Uttar Pradesh also has the biggest railway network, with 16,001 km of track (Invest UP, n.p.). The importance of railways can be understood from the quantum of goods transported through railways in this state. In 2020-2021, 28.4 million tonnes of goods were transported from Uttar Pradesh to other states; 87.4 million tonnes of goods were transported from other states to Uttar Pradesh. In addition, nearly 30 million tonnes of goods were transported internally within the state through railways (DGCIS, 2021).

Moreover, a significant part of two freight corridors Eastern Dedicated Freight Corridor (EDFC) and Western Dedicated Freight Corridor (WDFC) is in Uttar Pradesh and the total length of the corridors are 1,856 km and 1,504 km, respectively. EDFC consists of two distinct segments: one between Dankuni in West Bengal and Khurja in Uttar Pradesh and the second between Ludhiana in Punjab to Khurja-Dadri in Uttar Pradesh.

In EDFC project 1,049 km (57 per cent) of the rail track passes through 18 districts of Uttar Pradesh. The upcoming WDFC stretches from Dadri in Ghaziabad to Jawaharlal Nehru Port in Mumbai via Vadodara-Ahmedabad-Palanpur-Phulera-Rewari and has the potential to reduce the travel time of goods from Uttar Pradesh by almost 14 hours.

Besides, Amritsar-Kolkata Industrial Corridors (ADKIC) and Delhi Mumbai Industrial Corridor (DMIC) pass through the state. Both projects are intended to bring about major infrastructure and industry expansion in the states. For instance, the ADKIC aims at developing an Industrial Zone along the Eastern Dedicated Freight corridor – 150-200 km on either side of the Eastern Dedicated Freight Corridor – spanning across seven states (Punjab, Haryana, Uttar Pradesh, Uttarakhand, Bihar, Jharkhand and West Bengal) in India and 20 cities in these states.

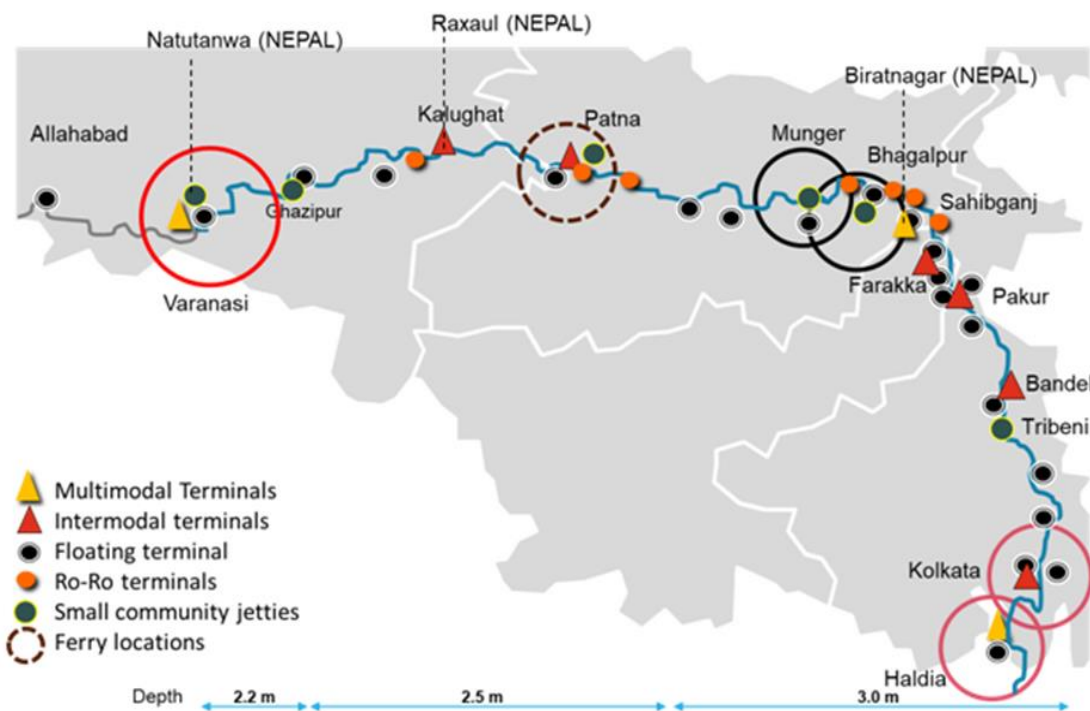
In Uttar Pradesh, under ADKIC, industrial corridors will come up between Khurja and Deendayal Upadhyay (formerly Mugalsarai) railway stations. The corridor will leverage the Inland Waterway System developed along National Waterway-1, which extends from Allahabad to Haldia. Further, there is also a proposal to integrate the corridor with the existing highway network.

There are eight air cargo terminals in Uttar Pradesh. The major national and international airports are operational at Lucknow, Allahabad, Gorakhpur and Varanasi, and two more international airports are under construction at Jewar and Kushinagar. The government has come out with Uttar Pradesh Civil Aviation Promotion Policy 2017 to promote investment, trade, and tourism in Uttar Pradesh (IBEF, 2021 A). In 2020-2021, these eight air terminals facilitated transportation of 6,998 tonnes of goods from Uttar Pradesh to other states; while 9,878 tonnes of goods were transported from other states to Uttar Pradesh (DGCIS, 2021).

With regard to waterways resources and connectivity also, the state of Uttar Pradesh is better placed compared to several other states. National Waterway-1 originates from this state and connects Allahabad in Uttar Pradesh to Haldia in West Bengal. Presently there are three floating inland waterways terminals in the state: Ghazipur, Ramnagar (Varanasi) and Allahabad. The Union Government is also building a Multi-Modal Terminal (MMT) and a freight village in Varanasi to facilitate cargo movement through national waterways. However, so far, only a few commodities and a low volume of cargo have been transported from/to the terminals in Uttar Pradesh through inland waterways.

For instance, in 2020-2021, only 65 tonnes of cargo were transported from Varanasi MMT to West Bengal and 34,340 tonnes of cargo were transported from West Bengal to Uttar Pradesh. The commodities transported comprise non-perishable bulk items (DGCIS, 2021). With the completion of the construction work in Varanasi MMT, a consignment from Nepal (especially third-country cargoes) could also be brought to Varanasi multi-modal terminal in Uttar Pradesh through Nautanwa LCS (Uttar Pradesh, India) via roadways. From there, cargoes could be taken to Kolkata/Haldia port using inland waterways (as depicted in Figure 1). The distance between Nautanwa and Varanasi is 280 km.

Figure 1: Master Plan of “Arth Ganga”



Source: Press Information Bureau (2020)

The long-term strategy of the Government of Uttar Pradesh is to create a connectivity web of air, water, road and rail network. It will help the state’s industries and manufacturing units switch seamlessly between different modes of transport as they send their goods to markets in India and abroad.

Snapshot of Logistic Ecosystem

Logistics Ease Across Different States (LEADS) Report 2022 is probably the best source to understand state of logistics in Indian states. The LEADS report applies three pillars, namely infrastructure, services, and operating and regulatory environment, and 15 indicators¹ to grade Indian states regarding logistics efficiency. These indicators are: Pillar 1 (infrastructure): road infrastructure; rail infrastructure; terminal

infrastructure; warehousing infrastructure; Pillar 2 (services): multi-modal logistics services; quality of services at terminals; reasonableness of prices of logistics services; timeliness – transportation services; timeliness – terminal services; track and trace cargo movement; safety/security of cargo; Pillar 3 (operating & regulatory environment): promoting, incentivising, facilitating; ease of obtaining all approvals; ease of entry, and issues related to grievance redressal.

Based on the performance in terms of 15 indicators, Indian States – grouped into four categories of Landlocked, coastal, Northeastern Region and Union Territories – have been categorized into three categories: Achievers, Fast Movers and Aspirers. While the *Achievers* are states that have shown exemplary logistics ecosystems with exceptional infrastructure and transparent regulatory processes; the Fast Movers are states that are moving towards becoming Achievers by notifying progressive policy and legislative initiatives along with new infrastructure projects. The *Aspirers* are States which have initiated their journey towards logistics ease and excellence by adopting national best practices to further improve their contribution towards India's emerging position as a global manufacturing and logistics hub.

Uttar Pradesh's logistics performance achievement is impressive, as reflected in LEADS² Report 2022. It is one of the six states across all four categories and 15 indicators which have achieved the status of *Achievers*. Other states in the list of *Achievers* include Haryana, Punjab, Telangana, Karnataka and Puducherry. In the preceding year, 2021, the state also achieved an impressive position. As per LEADS Report 2021, Uttar Pradesh jumped from 13th in 2019 to 6th in 2021.³

This superlative logistics performance of the state is primarily owing to the state's recent focus on developing the logistics sector. Some of the initiatives by state government are setting up of institutions like Nodal Officer, State Logistics Coordination Committee and State logistics cell; granting 'Industry Status' to Warehousing and Logistics Sector⁴; granting incentive on purchase of transport vehicles; providing required approvals to logistics units under one roof through a single-window system of the State named Nivesh Mitra.⁵

Uttar Pradesh is placed favourably in several indicators compared to other states. This is particularly in terms of storage capacity with highest number of railway good sheds (689) and cold storage (2406) having a share of 39.8 percent in India. It also has the highest number of training centres with the maximum number of individuals trained in logistics. The state stipulated an Integrated State Logistics Plan for uniform and comprehensive development of the logistic sector in the State (LEADS Report 2021).

Its proximity to Nepal is a big influencer in improving the logistics ecosystem in Uttar Pradesh. Given that the state shares a 560 km⁶ long border with Nepal, several border crossings were established between Uttar Pradesh and Nepal to facilitate bilateral trade between India and Nepal and transit trade for Nepal. Two major border crossings⁷ along Uttar Pradesh and Nepal are Rupaidiha, Uttar Pradesh-Nepalgunj, Nepal and Nautanwa, Uttar Pradesh-Bhairahawa, Nepal.

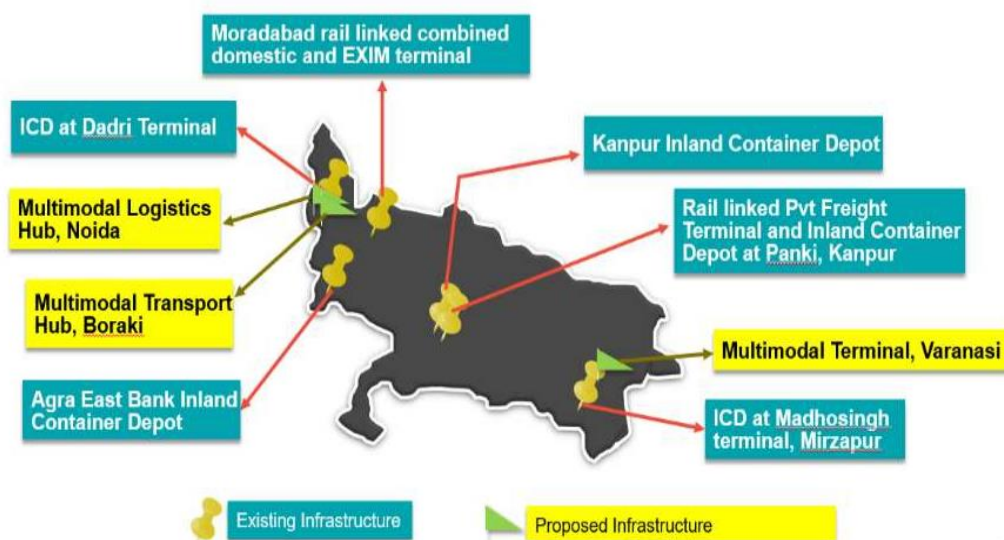
Other border crossings are Jarwa, Uttar Pradesh-Koilabas, Nepal; Gauriphanta, Uttar Pradesh-Dhangadhi, Nepal; Banbasa, Uttar Pradesh-Mahendranagar, Nepal; Barhni, Uttar Pradesh-Krishnanagar, Nepal; Khunwa, Uttar Pradesh-Taulihawe, Nepal; Sonabarsa, Uttar Pradesh-Malangawa, Nepal; Katerniyaghat, Uttar Pradesh- Rajapur, Nepal.

Apart from Khunwa-Taulihawe; Sonabarsa-Malangawa and Katerniyaghat-Rajapur border crossings all other border crossings are used for both bilateral trade between India and Nepal, and for Nepal's trade with third country through Kolkata port. The Land Port Authority of India is also building an Integrated Check Post (ICP) at Rupaidiha, spread over a total area of 115 acres. ICP Rupaidiha has direct access to National Highway-28 C and Nepalgunj Road Railway station (LPAI).

Presently, in Uttar Pradesh, 10 functioning Inland Container Depot (ICDs) and nine functioning Container Freight Stations (CFSs),⁸ while another two ICDs are under construction. ICDs in the State are in Agra, Moradabad and Kanpur. Other infrastructure includes Moradabad rail linked combined domestic and EXIM terminal and Rail linked Private Freight Terminal. Moreover, projects such as the Multi-Modal Logistics hub at Dadri, Multi-Modal Transport Hub at Boraki and Multimodal Terminal at Varanasi are already underway.

Two industrial corridors – Delhi Mumbai Industrial Corridor (DMIC) and Amritsar Delhi Kolkata Industrial Corridor (ADKIC) falls in Uttar Pradesh. The Uttar Pradesh government has planned infrastructural projects like Integrated Industrial Townships, Integrated Manufacturing Clusters, green field railway stations and logistics hubs along these corridors (Figure 2).

Figure 2: Existing and Upcoming Logistic Hub, Transport Hub and Inland Container Depot Uttar Pradesh



Source: Invest UP

Uttar Pradesh's Trade Potential

Overview of Priority Sectors and Industries in Uttar Pradesh

In India, Uttar Pradesh is the largest producer of food grains and vegetables. Major food grains produced in the state include rice, wheat, maize, millet (bajra), gram, pea and lentils. Other major agricultural products cultivated in the state are of oil seeds, potato and sugarcane. Moreover, under the One District One Product (ODOP) initiative, one product has been identified from each district of Uttar Pradesh, such as leather products and all handmade products manufactured through stone and marble from Agra district; musical instruments and readymade garments from Amroha district, etc. The state is also a major milk-producing state in India and 2018-19, it accounts for 16.50 percent of the total milk production of the country (IBEF, 2021 B; 2021 A; MOFPI, 2021)

Uttar Pradesh is the largest industrial state in India. Some of the major industrial zones of Uttar Pradesh are Kanpur region, Gautam Buddha Nagar, Ghaziabad, Jaunpur, Lucknow, Aligarh, Noida region, and Agra, etc. The major industries in Uttar Pradesh are agriculture and forest-based industries (sugar industry, wooden items and furniture industry, paper industry); textile industries (woolen textile industry, carpet industry); mineral-based industries (Aluminium Industry, Glass industry, Bass and other metal industry, cement industry, chemical industry, fertiliser industry); leather industry; and Information Technology (IT) industry.

The southern region of Uttar Pradesh is known as India's 'Energy Capital'. As on April 2021, the state had an installed power generation capacity of 28,001.95 MW (IBEF, 2021B).⁹

For the development of these industries, the Uttar Pradesh government offers a wide range of subsidies, policy and fiscal incentives, and assistance for businesses under the Industrial and Service Sector Investment Policy, 2004 and Infrastructure and Industrial Investment Policy, 2012. Other policies in place to promote business are the Uttar Pradesh Civil Aviation Promotion Policy, 2017; New Electronics Manufacturing Policy, 2020; Uttar Pradesh Startup Policy, 2020; Uttar Pradesh Warehousing and logistic policy, 2018; etc. (IBEF, 2021B)

UP's Export Potential

Uttar Pradesh is a major origin of exports from India. This is reflected by the fact that merchandise exports from Uttar Pradesh reached US\$ 16.99 billion in 2019-20. This accounted for more than 5 percent of total exports from India during 2019-20 valued at US\$314.31bn. The state is one of the largest exporting states across several categories of products from the country, such as, saddlery and harnesses, silk carpets, processed meat, buffalo meat, sheep/goat meat, sports goods, telecom instruments, etc. (EXIM Bank of India, 2021).

Figure 3: Top Exported Products from UP (2020-21)

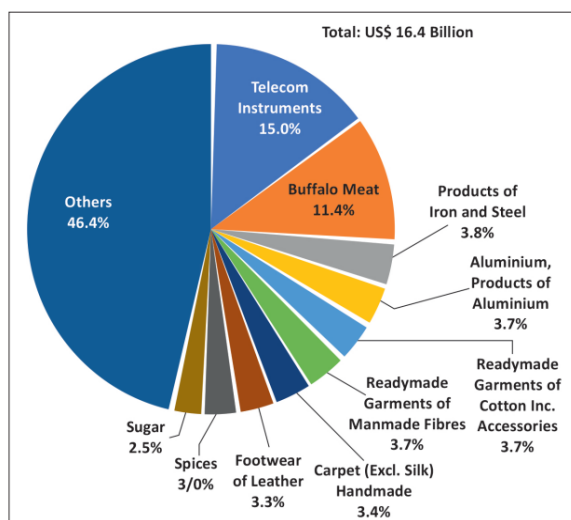
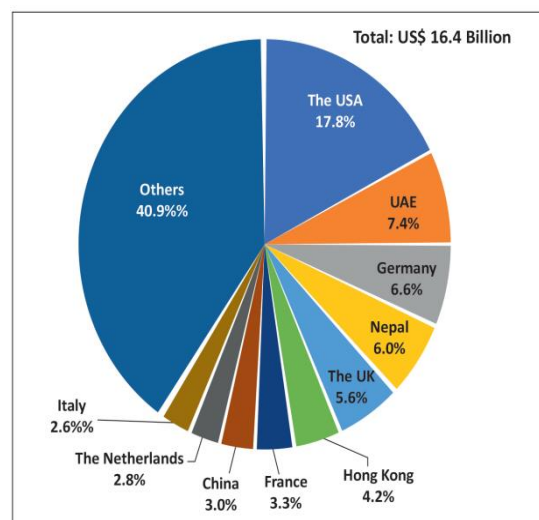


Figure 4: Top Destinations for Merchandise Exports from UP (2020-2021)



Source: EXIM Bank of India, 2021

In addition, the state is also major exporter of products like telecom instruments, products of iron and steel, aluminium and products of aluminium, readymade garments of cotton including Accessories, and readymade garment of manmade fibres , etc (EXIM Bank of India, 2021) (Figure 3). The major destinations for merchandise export from UP are USA, UAE, Germany, Nepal, UK, etc. (Figure 4).

The state government had sanctioned Special Economic Zones (SEZs) to accommodate various sectors such as IT/IteS, textiles, handicrafts, and non-conventional energy. IT/IteS accounted for the maximum share of approved SEZs in the state, followed by electronic products. As of October 2020, Uttar Pradesh had 21 notified, 13 operational SEZs and 24 formally approved SEZs (EXIM Bank of India, 2018; IBEF, 2021B).

Logistics in the state critically influence the functioning and performance of its industrial zones in terms of producing goods for local consumption and domestic and international trade. Improved logistics have the potential to help the state achieve its optimal position in manufacturing and exports. As per an Exim Bank report (2018),the state will potentially reach exports of US\$30bn by 2023, thereby imparting a renewed energy and momentum to the export growth story of Uttar Pradesh. This, however, hinges on creating an enabling environment across sectors and for capacity building in sectors, such as meat processing, dairy industry, handloom and handicraft industries, among others.

Bringing in logistical efficiency will be a cross-cutting issue across sectors. As per the EXIM Bank report[†], achieving an export target of US\$30bn would require robust infrastructure for providing forward and backward linkages to exporting units. Identifying, creating and promoting logistics infrastructure with potential to promote exports are also important. This includes airports, dry ports, container freight stations, Inland Container Depots (ICDs), warehouses, agro-warehouse, post-harvest processing facilities, packaging facilities, export product exhibition centres, food parks, textile parks, raw material banks for high-quality raw materials, multi-modal logistics hubs, and specialized industrial zones viz. SEZs and State Investment and Manufacturing Zones.

Conclusion and the Way Forward

The need for improved logistics for export and economic progress of the state has been reinforced by the COVID-19 pandemic, which has underscored the need for a resilient logistic sector that can adjust with and leverage from the transforming demand and supply landscape, environment, technology, workforce aspirations and skill set. Though Uttar Pradesh has taken number of initiatives to improve the logistic ecosystem of the state and promote investment, the state still needs improvement in terms of transport connectivity and logistic infrastructure to enhance the logistic scenario in Uttar Pradesh. The state may consider the following measures to improve further its logistics ecosystem.

- The majority of the merchandise export of the state is either routed through ports in Western UP or other states. Therefore, there is a need for trade-enabling infrastructure and greater capacity building in the eastern part of the state.
- The Uttar Pradesh has come out with the Warehousing and Logistics Policy 2018, which aims to strengthen the state's foothold in the logistics sector. As the Central government has now come out with the NLP 2022, there is need to review this Policy to ensure that Warehousing and Logistics

[†] Exim Bank (2021). Exports from Uttar Pradesh: Trends, Opportunities and Policy Perspective

Policy 2018 of the state is tuned to the NLP, and also in line with the PM Gati Shakti Master Plan for Multi-modal Connectivity.

- At the ground level, truckers often face cases of cargo theft on many road stretches and unscheduled stoppages by enforcement officers, which increases logistic costs and transit time. The state must take steps to improve the safety and security of the cargo during transportation. Digital initiatives such as trackers, CCTV, digital documents, etc. could be taken to ensure the security of cargo, the unscheduled stoppage of trucks by officials, and to ease obtaining approval from authorities.
- Sanitary and Phytosanitary (SPS) measures and Technical Barriers to Trade infrastructure plays a crucial role in promoting exports as to compete in highly regulated advanced economies, exports need to adhere to various quality requirements. In this regard, the existence of adequate research institutes and NABL accredited laboratories play a vital role in enhancing the quality of products in line with international standards. Uttar Pradesh has only 83 labs at an internationally acceptable level of competence (EXIM Bank of India, 2021). Therefore, there is a need to set up more SPS/TBT infrastructure such as FSSAI, Drug Controller and Animal Quarantine related testing facilities in the State.
- There is a lack of coordination among various stakeholders. In line with the NLP and PM Gati Shakti, the state policy needs to be tuned with the NLP.
- According to the NITI Aayog report, the state is underperforming in several areas, particularly internet facilities, industrial corridors, industrial land, clusters, and ITs and food parks. Resolving Issues like internet facilities, and facilitating integration of ITs into logistics and related infrastructure are critical for creating an enabling ecosystem for economic activities and trade in the state.
- In Uttar Pradesh, all the terminals, apart from the upcoming Varanasi MMT, have only a pontoon barge and pontoon gangway with no crane facility for loading and unloading. They even lack other facilities like electricity, storage, and security infrastructure. The state government may address this to create an enabling ecosystem for efficient logistics.
- Road infrastructures in various stretches are not adequate, and in many cases completion of the project is delayed often causing time and cost overruns. Uttar Pradesh should put in place the necessary mechanism to address issues related to time and cost overruns of projects.
- The state needs to further invest in augmenting its road connectivity infrastructure, especially to the ports, including investment in widening and strengthening existing roads and construction of new roads, particularly in border areas with Madhya Pradesh and Nepal.

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Endnotes

- 1 Logistics Ease Across Different States
- 2 The ranking system applied in the LEADS 2021 report has been replaced with a new logistics efficiency assessment approach in LEADS 2022 report. The new approach is qualitative in nature and ranks states and UTs into three groups, namely *Achievers*, *Fast Movers*, and *Aspirers*.
- 3 It provides capital and interest subsidy to Infrastructure developers along with 50% concession on land use conversion charges and incentive on skill development for warehousing and logistics professionals.
- 4 It also acts as a grievance redressal mechanism for the logistics and warehousing sector that would create large scale employment.
- 5 [Length of Indo-Nepal border could change after re-demarcation: Officials | Latest News India - Hindustan Times](#)
- 6 www.salestaxindia.com/DEMO/TreeMenu.aspx?menu=171687
- 7 A CFS acts as an extension of a port/airport/ICD customs station, set up with the main objective of decongesting the ports, where only a part of the customs process, mainly the examination of goods is normally carried out by Customs. At a CFS, goods are stuffed into containers or de-stuffed there from and aggregation/segregation also takes place at such places.
- 8 6,242.20 MW (state utilities), 13,562.74 MW (private utilities) and 8,197.01 MW (central utilities).
- 9 NITI Aayog, Export Preparedness Index 2021



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