



Guiding Spirit to Shipping Industry

Sagor Sandesh

Maritime Tabloid English Weekly E-Paper

In association with R L Institute of Nautical Sciences, Madurai, Tamil Nadu. | RNI No. TNENG/2012/41759 | Wednesday, March 14, 2018 | Voyage 7 Wave 6



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Indian banks' financing ships for expanding the fleet is going to be bleak especially after PNB fiasco: Mr T Kumaran.



Mr T Kumaran, former President of the Shipping Division of Gati Coast to Coast

Sagar Sandesh: What is the state of Shipping Industry which had to forgo banking finance for over ten years?

Mr.T.Kumaran: Bank sentiment is still affected for the last one decade by Loan losses High provision Sales of portfolios

Was the Lehman bros a trigger?

Global bank finances now stands at 2007 levels as on 2017 Dec...I.e. about 390 billion US Dollars by major shipping financing banks. Even though the tonnage grew by 25 per cent for that period Ships are being now being financed more by combination of equity Leasing Institutional funds.

International and European restrictions are also not helping the revival. Though beginning of 2018 some German banks and Japanese banks have started financing. However these shipping banks are quite cautious and seeking safety through known and large clients, higher margins and low finance percentages, as well as stringent terms. The worst affected are the small and medium ship owners. Some rise in earnings and vessel values has given some comfort but not on firm footing. This being the overall scenario, Indian banks' financing ships for expanding the fleet is going to be bleak especially after PNB fiasco.

SS: What will be the impact of merger of global shipping companies on freight?

Mr.T.K: Consolidation, whether through alliances or mergers and acquisitions (M&A), will continue apace

in the container shipping industry into 2018, as companies try to boost market share, improve efficiency, and handle intensifying competition and persistent oversupply

Most of the Shipping companies posted losses in 2016 and we even saw 1 bankruptcy. The lack of sustainable profit levels lead to accelerated industry consolidation. Industry consolidation is an important trend Mergers & Acquisitions as well as Alliances. The container shipping industry is fragmented and consolidation will enable carriers to create economies of scale and to optimize networks. This will in the long-run benefit customers.

Conventional wisdom states choices fosters competition

Competition benefits customers. And the market will play in the most efficient way possible. Major trade routes are where these alliances covering 80 per cent of the world container cargo: Trans pacific, Asia Europe and Transatlantic

Ocean-Alliance : CMACGM, COSCO OOCL and EVERGREEN (323 ships and 3.5 mn TEU)

The Alliance : NYK, MOL, "K" Line, Hapag Lloyd and Yang Ming (241 ships and 3.3 mn TEU)

2M Alliance: Maersk and MSC (223 ships and 2.4 mn TEUs)

Two more mergers are expected by May 2018. Some are even predicting only handful of companies will be left out by the end of this decade.



The Kra canal
Thailand's Kra canal would link Indian, Pacific Oceans, benefitting China, it is said.

SS: Logistics is emerging as a major industry since manufacturers prefer to hand to mouth existence. Major economic powers like China Japan are

constructing a canal dividing Thailand to cut logistics cost. What needs to be done in India considering the fact that Logistics costs is around 14 per cent of GDP. What are the concrete steps India should initiate to cut Logistics cost so that our products become competitive in the global market?

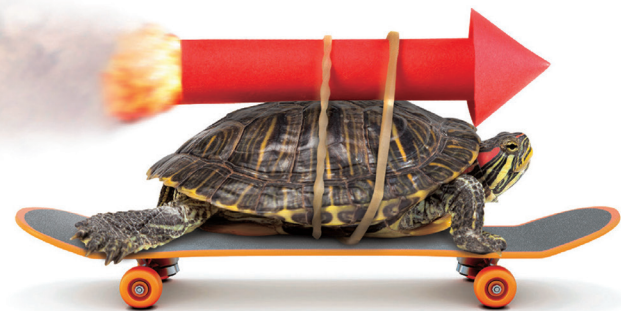
Mr.T.K: This KRA canal across Thailand to reduce 1200 Nautical Miles of sailing distance will benefit both Thailand and China. Currently ships from the far-east Chinese port reach Indian Ocean through Singapore. The KRA canal is being

dug across Thailand to reduce the sailing distance resulting in saving in freight costs. The maiden attempt to construct the canal was by the Japanese. Now the Chinese have taken over the work.

There are groups for and against this project. Will it come through or not, is anybody's guess. What matters is the kind of thinking to provide logistics by the governments in the competitive global scene.

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Editor speaks...

In a comprehensive interview, candid and outspoken, Mr. T.Kumaran, former President of Shipping Division of Gati Coast to Coast strikes a comparison between India and China in terms of commitment to enhance the logistics of the country. Of course the present government is taking all possible steps to augment the logistics-related infrastructure; despite efforts, it seems China seems to reach a faster pace of growth. What has happened to Sethusamudram project even though a huge fortune of Rs 1000 crore has been spent in a period of about 12 years? But on the other hand, he says, Recently China launched their China – London rail freight service. Or their Silk route project or their Hambantota port indicates their aggressive approach to facilitate their nation in logistic support of their export goods. Private players have their own limitations in big play in this kind of projects. India's lack of focus and aggressiveness will affect our export potential and cost effectiveness.

Another matter of grave importance he points out is banks' financing shipping company. He seems to rightly surmise that banks might be hesitant to come forward with too much shocking PNB scam. The common man wonders what is happening in the banks. With all in-built checks and

balances, transparency appears to be the first casualty.

Of course, all experts have repeatedly pointed out the poor last mile connectivity for ports and now Government appears to be seized of the urgency of improving the last mile connectivity, very crucial for port performance.

Let us see what more Mr. T. Kumaran has got to say in the next issue.

Wartsila's Eniram Mobile is a boon for the industry. The major service of this facility is succinctly pointed out: this facility helps distribute the right data to the right people to take the right decisions at the right time. Extremely right strategy that promotes business. Information is power. Decision depends on information and business is a continuous series of right decisions.

It is really delightful to know that Mumbai Airport has been named the world's best for quality service.

It is really very sad to note that Maersk Honam fire claims the life of a crew member. Despite technological developments and measures taken towards safety and security of the assets including the crew members, accidents keep happening, proving that the saying 'Accidents happen' still remains a fact. Can we hope for a future where no accidents happen?

with warm Regards

Indian banks' financing ...

From Page - 1

The Indian Railway is still a government monopoly. Looking at our own Sethusamudram project stuck even after 12 years after spending more than 1000 crores of tax payer's money. Recently China launched their China – London rail freight service. Or their Silk route project or their Hambantota port indicates their aggressive approach to facilitate their nation in logistic support of their export goods. Private players have their own limitations in big play in this kind of projects. India's lack of focus and aggressiveness will affect our export potential and cost effectiveness.



SS: An Owner of a container terminal was quoted as saying recently that India needs more cargo and not more Port facilities. World over container traffic is picking up. The trend is not visible in India except in select West Coast Ports? What could be the reasons for the low container traffic in Indian ports and how this issue could be addressed?

Mr.T.K: Colombo's single port total container handled is as much as India's all ports put together. All the first dozen ports of China are bigger than our largest port JNPT. Our port infra need to be improved keeping with the country's growth. More export cargo is definitely required. Our Import vs. Export ratio is badly out of proportion. Hence the box rates to India are not favorable as they have to return back with empty boxes. One of the reasons for export is less because of high cost of our product. Our supply chain is not efficient

As of Dec.2017 our ports installed container capacity is:

Total installed capacity – 21 million TEU while Throughput-13.8 million TEU

Only these following Terminals are working at 100 per cent capacity utilization:

JNPT
APM (GTIPL)
Mundra International (MICT)
PSA SICAL Tuticorin

Interestingly all are on the West Coast of India (though PSA SICAL geographically on the East coast, but can be approached only from the West).

Vallarpadam ICTT Cochin could achieve only 50 per cent utilization.

India's export to Western countries like United States and European Union is 72 per cent of the total export of the country. Hence it is obvious more containers are being shipped out from the

West Coast. However India's imports are more from East as compared to West. India is one of the fastest growing economies in the world. We need to address our growing requirement of containers keeping this in mind. Our export growth needs to be addressed to address this mismatch.



SS: Logistics is emerging as a major industry since manufacturers prefer to hand to mouth existence. What are the concrete steps India should initiate to cut Logistics cost so that our products become competitive in the global market?

Mr.T.K: India's international logistics performance Index (LPI) is 35 in 2016 as compiled by World Bank. No doubt we are moving forward in our Quality of trade and infrastructure, Competence and quality of logistics service, Efficiency of customs And Ease of arranging competitive price on the port end.

Whereas our Domestic LPI needs lot of improvement. All our container transport happens through roads as our railway freight rates are very high and unreliable scheduling. Our infra does not permit all our freight trains to deploy double stack containers. The last mile connectivity is very poor and pushes the cost of export and import high. Unless our supply chain efficiency is improved, our cost advantage not going to improve. About over 30 per cent of respondents in World Bank domestic LPI answered that solicitation of informal payments (bribes) needs to be addressed.

In Chennai, the ambitious Chennai port-Maduravoyal infra project got stalled for six years for trivial reasons. The movement of Containers inside the port is too congested. It takes more than a day to move a container into the port covering a distance of about 8.7 km. We are not going to be competitive this way.

To give an example pulses move from Yangon to Singapore and then to Chennai or Mumbai covering a distance of 2600 Nm to Chennai and 3500 Nm to Mumbai. We, at Gati provided direct Yangon to Chennai direct service covering a distance of 990 Nm only thereby saving fuel and time. However when we wanted to send the containers from Chennai Port to Nagpur where major tur(Arhar) millers are situated, it was a difficult task though we could finally tie up with Concor and move the containers. Even now these pulses move from Yangon to Singapore and then to Chennai/Mumbai. India imports over 1 million tones of pulses from Myanmar. Naturally the end product cost to the consumer for all these delays will be high. (This year Govt. has put a cap on the quantity).

(To be continued)

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Small coastal ship owners are at the mercy of regulators at every level: Mr T Kumaran



Mr T Kumaran, former President of the Shipping Division of Gati Coast to Coast

(Interview of Mr. T. Kumaran continued from the previous issue.)

Sagar Sandesh: Coastal shipping has not taken off in India despite several concessions offered by the Shipping Ministry. Can you identify the obstacles and how they can be overcome?

T Kumaran: We have heard every year how India is having 7500 Nautical miles of coast line.

Now Sagarmala project. Also how sea borne traffic is cost effective and with less carbon foot print

If that is the case why is that the two Ro-Ro services transporting cars from Chennai port to the Ports in the Gujarat coast failed recently?

European Union has 70,000 Nautical miles of Coast line and 1200 commercial ports. They have developed a comprehensive successful port policy including all stake holders.

No doubt ports need to be improved and modernized along with providing connectivity. What about the ships that are going to use these ports. We still have 1958 Merchant Shipping Act with some amendments to govern these ships. This act has even now has some regulations of British Era. Coastal ship officers and crew still have to go through immigration while signing off in some of the ports. We do not see Airline pilots go through this procedure when they fly from Chennai to Mumbai and getting down. At every port coastal ships have to go through port health approval for no reason. There are endless vows of the small coastal ship owners, who are at the mercy of regulators at every level.

Our coastal shipping is not cost effective. Coastal ship owners are small ship owners. Finances for these ships are hard to come by from the banks. We are trying to man the vessels with the main fleet officers and crew which is not cost effective. We failed to create

a separate coastal shipping entity. There is no one to help them. They do not have power lobby like road transport sector. Unless these basics are addressed we are long way from realizing some improvement.

All port related tariff are based on foreign going vessels with some discount. This is not going to work. All policies should aim at reducing cost and time for the user. Can our coastal ships full fill JIT (just in time) supply chain concept 24x7.

One of the best coastal projects that have happened in India is Tamil Nadu coal movement from Odisha and Haldia for their Thermal plants for the past five decades. Only that the cost angle is skewed since the user is State government.

The author last worked as President of Gati coast to coast, a Shipping Division of Gati.

For the benefit of the readers, we give the summary of the Interview since it has continued in two issues.

Mr.T Kumaran, formerly President of the Shipping Division of Gati Coast to Coast company for over a decade, is now specializing in purchase and sale of ships. A Mechanical Engineer from the prestigious College of Engineering Guindy and a Post Graduate in Business Administration, he started his illustrious marine career as Chief Engineer with Indian and foreign ships for nearly two decades. He became the branch Head of the Chowgule Steamship Company in 1993. He also holds first class MOT in Marine engineering.

In an exclusive interview with Sagar Sandesh Mr Kumaran dwells on various issues concerning the industry how the banks world- wide are reluctant to finance purchase of ships an industry reeling under the impact of recession for over ten years,

He said Global bank finances to fund the purchase of ships stood at 2007 level as on December 2017 at 390 Billion US Dollars even though the tonnage grew by 25 per cent during this period. During the beginning of this year (2018) some German and Japanese banks have started lending funds for purchase of ship. But still they are cautious on lending to this sector.

The small and medium ship owners are the ones who are worst affected by the credit crunch. Ships are financed by combination of equity leasing institutional funds. The Indian banks financing ships to firms expanding their fleet is going to be bleak after the Punjab National Bank Scam.

Lack of substantive profits by shipping companies since 2008 has led to accelerated

industry consolidation. However, the container shipping industry is still fragmented and consolidation in this sector will enable carriers to create economics of scale.

Two more Mergers of Shipping Companies are expected by May this year over and above the ones that has taken place during the last one year. Some are even predicting that only a handful of companies will be left by the end of this decade.

On the role of logistics, Mr Kumaran said while the Sethusamudram Ship Canal Project which will usher in prosperity to south Tamil Nadu has made no progress in the last eight years after sinking nearly one thousand crores of tax payers money, Chinese are constructing a massive KRA canal cutting across Thailand to reduce the sailing distance from the Far East to Indian Ocean by 1200 nautical miles. The ships in this route can now bypass Singapore and Port Klang, if the canal work is completed. The Sethusamudram canal will give boost to coastal shipping by establishing a direct connectivity from Chennai port to Tuticorin port situated near the land' end of the country. Currently the ships have to circumnavigate Sri Lankan to link these two ports.

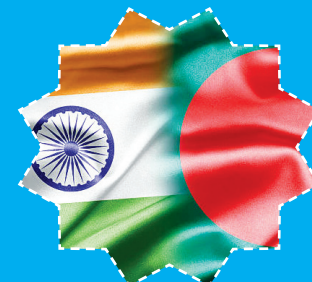
ON the issue the west coast ports especially in Gujarat and Maharashtra doing well and east coast ports working to fifty per cent of the capacity he said the total installed capacity of Container terminals in the Indian ports is 21 million TEUs a year but the throughput is hardly 13.8 million Teus.

JNPT in Maharashtra, APM and Mundhra both private ports in Gujarat and PSA-Sical terminal in Tuticorin all in the West Coast are working at 100 per cent capacity. Though Tuticorin port though situated in the East Coast, its approach is through the West.

India occupies 35 th place in International Logistics Indwx in 2016. Major portion of Container transport is still carried by the road transport as the cost of Railway freight is very high and schedules unreliable. Our infrastructure especially in the East Coast does not permit all our freight trains to have double stack containers. The last mile connectivity is very poor thereby hiking of cost of both exports and imports.

About thirty per cent of the respondents, mostly stakeholders in the port operations, interviewed in the World Bank Domestic Logistics Performance Index announced that solicitation of informal payments (bribes) needs to be addressed.

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LOGISTICS - 7



IATA, MoCA and RGNAU join hands ...

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AEPC express concern over the ...

PORT - 10



Container Handling Operations in ...

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Editor speaks...

This week Mr. T.Kumaran's interview continues and the most significant point appears to be that towards logistics upgradation, Indian approach is not that aggressive as that of China. China's construction of KRA canal is on a faster pace compared with the Setusamudram project which has consumed about thousand crores of rupees and despite many years no discernible progress has been made.

In fact, for the sake of the readers, the summary of Mr. T. Kumaran's interview is added this week.

It is really encouraging news that the stage has been set up for setting up a defence corridor of the country in Tamil Nadu and there is every possibility that there is rich scope for the local industrialists to be involved in the manufacture of defence-related products.

Again, the government has to decide upon a quick action with regard to Ram Setu project. The benefits that accrue due to completion of the project must not be denied to the nation, to the industry.

The Railways seems to be doing the right thing: thinking out innovative ways of maximizing revenue generation through rationalizing the use of locomotives in such a way the locomotives released from passenger operations will

be put to use to obtain more revenue to freight transport.

US prepares itself for trade war with India; in fact, Trump administration seems to focus on promoting US in all sectors and the President has taken exception to India's decision to levy customs duty on import of US motor cycles which will affect its business.

Container Truck Association notice for strike is a grave matter of concern for the performance of the three ports and we believe appropriate action will be taken soon so as to avoid any strike that will be negatively impacting the industry.

It appears that illegal trafficking will never come to an end no matter however stringent regulations are framed by all the stakeholders. Libyan naval forces have arrested a tanker on suspicion of oil smuggling. Even the pirates too focus on taking away oil since it is highly profit-making commodity. According to Reuters, Western Libya is also the departure point for human traffickers smuggling mainly sub-Saharan Africans by boat to Italy. Human trafficking, a miserable inhuman act, continues reflecting the persistent apathy of the wicked.

Hope other stories will as usual be informative.

with warm Regards

Small coastal ship owners •• From Page -1

About one million tons of pulses are imported into the country from Myanmar. They move in a circuitous route from Yangon to Singapore port and then on to Chennai port (2600 nautical miles) or more often to Mumbai (3500 nautical miles),

In an effort to cut freight costs, Gati Coast to Coast company came forward with the Direct Shipping Service from Yangon to Chennai (990 nautical mile saving fuel and time. But they faced difficulty in Chennai Port in sending the containers to Nagpur where the mills to polish the pulses are situated. Hence the pulses imports had go via JNPT which has better rail connectivity to Nagpur,

On Coastal shipping, Mr Kumaran said despite several concessions announced by the government the Two Ro-Ro service carrying automobiles from Chennai port to ports in Gujarat failed recently.

Coastal Ship Officers and Crew still have to go through immigration when they sign off at some Indian ports. We do not see airlines pilot undergo this screening while flying in domestic destinations. At every port, the coastal ships have to go through Port Health approval for no rhyme or reason.

We have failed to create a separate coastal entity

and with the result coastal vessels man vessels from main fleet officers and crew which is not cost effective.

All Port related tariffs are based on foreign going vessels with minor discounts. This is not going to work.

The only effective Coastal services that has worked effectively is the Tamil Nadu governments Poompuhar Shipping Corporation which has ferried coal from Haldia Paradip ports to thermal plants in Tamil Nadu through Ennore and Tuticorin ports. This operation has been going on for the past forty years. But the ships Anna Periyar have become old and are to be scrapped this year. But the state government is dragging its feet in purchase of seven second ship ferrying coal.

(The corporation has no independent identity and depends of the mercies of the Tamil Nadu power generation and distribution corporation. (TANJEDCO) The Tanjedco authorities are keen to wind up the fifty year old corporation and entrust the ferrying of coal to private ships even though it will be a expensive proposition. This is the fate of the successful coastal shipping company of the country)

The stage set for setting up the first defence corridor of the country in Tamil Nadu

CHENNAI
Sagar Sandesh News Bureau

By kicking off the first inter active session with the local industry, defence Minister Nirmala Sitaraman set the stage for setting up the first defence corridor of the country in Tamil Nadu which was announced in the last year's Union budget. The second corridor will be set up in Uttar Pradesh. Subsequent to the announcement, the process has begun to set up these corridors.

The proposed corridors are part of the multiple measures the defence ministry is taking to promote indigenisation of the defence industry. The Tamil Nadu defence covers Chennai, Hosur, Salem, Coimbatore and Trichirappalli as Industrial nodes.

As one of the first steps to initiate development of the Tamil Nadu Defence Corridor, an interactive meeting with local industry was held at Tiruchirappalli on March 16th. The meeting, which was attended by over 200 representatives from the industry, was addressed by Defence Minister Nirmala Sitharaman. Several Ministers and senior Officials of Tamil Nadu Government, Defence Ministry, Defence Public Sector Undertakings, Bharat Heavy Electricals Limited (BHEL) and Ordnance Factory Board were also present for the meeting.



Defence Minister Nirmala Sitaraman

In her inaugural address, Ms Sitaraman gave a brief overview of the importance of the defence sector in the overall growth and development of the country and highlighted the importance of the proposed Defence Corridor in this respect. She sought the active support of all the stakeholders to make the project successful.

Several presentations ranging from measures taken to promote indigenization and self-reliance in defence production, the industry friendly measures taken by the Tamil Nadu government, the envisaged role of the Public Sector Enterprises in the proposed Defence Corridor and the capabilities and expectations of the local industry were made. The presentations were followed by a vibrant question answer session.

The Tamil Nadu Defence Corridor, also called the Tamil

Nadu Defence Production Quad as the nodal cities form a quadrilateral, will include Chennai, Hosur, Salem and Coimbatore, Tiruchirappalli as nodes. These nodal cities have existing defence ecosystem in the form of OFBs, vendors working with Defence PSUs, and other allied industries. The Tamil Nadu Defence Corridor aims to bolster interaction between all industry players in order to create long term synergy and eventual development of the area into a Defence Production powerhouse.

Speaking on the occasion, the Minister also invited the local manufacturers to showcase their products related to defence supplies so as to attract the attention of more than 300 manufacturers expected to be present in the Def Expo 2018 scheduled between April 11th to 14th at Chennai.

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