



ENROUTE[®]

Moving **India's**
Mobility
Ambition



September 2026



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Moving India's Mobility Ambition

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Editorial

The Supply Chain Behind Every Vehicle

Dear Readers,

India's mobility ambition is entering a decisive phase. Vehicle production and exports are expanding, electric mobility is reshaping industrial ecosystems, and manufacturers are investing in deeper localisation. Behind every milestone, however, lies an equally critical capability: moving materials, components, batteries and finished vehicles with precision.

This edition of Enroute examines automobile logistics as a strategic enabler of India's mobility ambitions. The focus extends beyond transportation to the connected systems linking supplier clusters, warehouses, assembly lines, rail networks, ports and dealerships.

The scale is significant. In FY2025-26, India recorded its highest-ever domestic sales across all four major vehicle segments: 46.43 lakh passenger vehicles, 10.80 lakh commercial vehicles, 8.36 lakh three-wheelers and 2.17 crore two-wheelers. These volumes demand logistics networks that are responsive, visible and resilient. (data source : siam)

The industry is also undergoing a structural shift. Just-in-Time and Just-in-Sequence models are making timing and coordination more critical, while multimodal transport is creating opportunities to improve both cost and emissions. Digital control towers, IoT, artificial intelligence and integrated logistics platforms are enabling a move from reactive execution to predictive decision-making.

Electric mobility adds another layer of complexity. Batteries, power electronics and critical materials require specialised handling, traceability, safety protocols and reverse logistics. The automotive supply chain is consequently expanding beyond production and delivery to encompass the entire vehicle lifecycle.

Through the cover story, expert perspectives and case studies, this edition explores how logistics is helping automotive companies strengthen continuity, optimise assets, expand exports and prepare for the next generation of mobility.

India's future competitiveness will be determined not only by what it manufactures, but also by how intelligently, efficiently and sustainably it moves.

Happy reading.



Editorial

Automotive Momentum India's Automotive Story in Numbers

Indicator	Latest reported figure
Passenger-vehicle sales, FY2025-26	46.43 lakh
Commercial-vehicle sales, FY2025-26	10.80 lakh
Three-wheeler sales, FY2025-26	8.36 lakh
Two-wheeler sales, FY2025-26	2.17 crore
EVs sold under PM E-DRIVE as of 27 January 2026	22.12 lakh
Auto-component turnover, FY2024-25	₹6.73 lakh crore
Auto-component exports, FY2024-25	USD 22.9 billion
India's estimated logistics cost	7.97% of GDP

The figures underline the scale of the logistics challenge. India's automotive ecosystem must synchronise high-volume domestic flows with growing exports, complex component networks and an expanding EV value chain.

The auto-component industry recorded turnover of ₹6.73 lakh crore and exports of USD 22.9 billion in FY2024-25, while 22.12 lakh EVs had been sold under the PM E-DRIVE scheme by 27 January 2026. Every additional vehicle produced creates corresponding demand for capacity, coordination, visibility and resilience across the logistics network.



This publication is a part of KNIT, a knowledge dissemination initiative of TCI Group. We believe in sharing insights and knowledge with the industry, to encourage best practice replication.



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Cover Story

Beyond the Assembly Line

Why India's Automotive Future Will Be Decided by Supply-Chain Intelligence

When a vehicle leaves the assembly line, its logistics journey is only beginning.

Its production may have relied on steel, electronics and components sourced from multiple regions; deliveries coordinated through Just-in-Time or Just-in-Sequence systems; and digital platforms tracking every critical movement. From the factory, the vehicle may travel through stockyards, rail terminals, highways, ports and Ro-Ro vessels before reaching an international customer.

An automobile, therefore, is not the output of a factory alone. It is the result of a coordinated logistics ecosystem.

India's automotive industry is expanding simultaneously across domestic consumption, global exports, component manufacturing and electric mobility. In FY2025-26, passenger-vehicle exports reached a record 9.05 lakh units, while two-wheeler exports rose to 51.8 lakh units.

These figures represent more than market demand. They translate into millions of component movements, thousands of supplier interactions, extensive warehouse operations, specialised vehicle carriers, rail and road journeys, port processes and international shipping schedules.



Cover Story

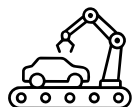
As the industry grows, fragmented logistics will become an increasing constraint. The next phase of India's automotive ambition will depend on supply chains that are integrated, intelligent, resilient and capable of moving at the speed of manufacturing.

From manufacturing ambition to logistics execution

India's automotive sector has traditionally been viewed through the lens of manufacturing capacity, product quality and consumer demand. Those factors remain fundamental, but they are no longer sufficient to define competitiveness.

A manufacturing plant can have modern equipment, skilled talent and strong process discipline. Yet if critical components do not arrive on time, finished vehicles cannot reach export gateways or inventory remains invisible across the network, the entire value chain loses efficiency.

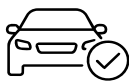
Logistics now affects:



Production
continuity



Inventory and
working capital



Vehicle
availability



Export
competitiveness



Customer
experience



Carbon
performance



Business
resilience

This is why logistics is moving from the background to the centre of automotive strategy.

The assembly line may be visible, but the logistics network is what keeps it moving.

The automotive ecosystem is becoming more connected

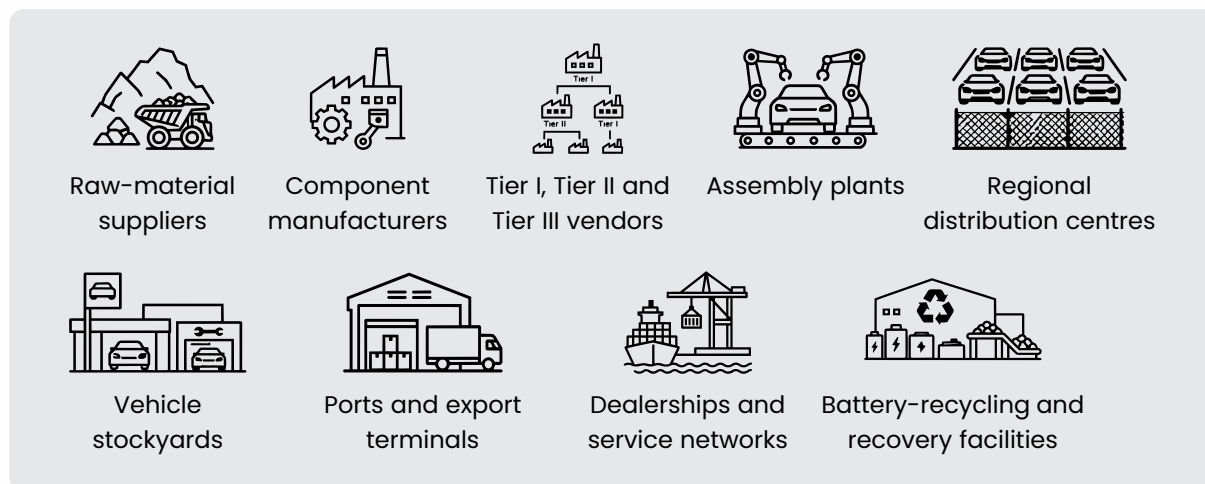
The Indian automotive supply chain is growing in both scale and sophistication. Auto-component manufacturers are increasing value addition, investing in technology and expanding their participation in global supply chains.

ACMA reported that the automotive component industry recorded turnover of ₹6.73 lakh crore, or USD 80.2 billion, in FY2024-25, representing 9.6% year-on-year growth. Component exports rose 8% to USD 22.9 billion, while imports rose 7.3% to USD 22.4 billion, resulting in a trade surplus of USD 453 million.



Cover Story

These developments are strengthening the case for logistics networks that connect:



The resulting network is not linear. It is a dynamic ecosystem in which a disruption at one point can affect production, inventory, transport capacity and customer delivery across multiple locations.

1. WHEN LOGISTICS BECOMES THE ADVANTAGE

For decades, logistics in the automotive sector was assessed primarily through freight rates, transit times and delivery performance. Those measures remain important, but the role of logistics has expanded.

Today, logistics influences the design of the supply chain itself.



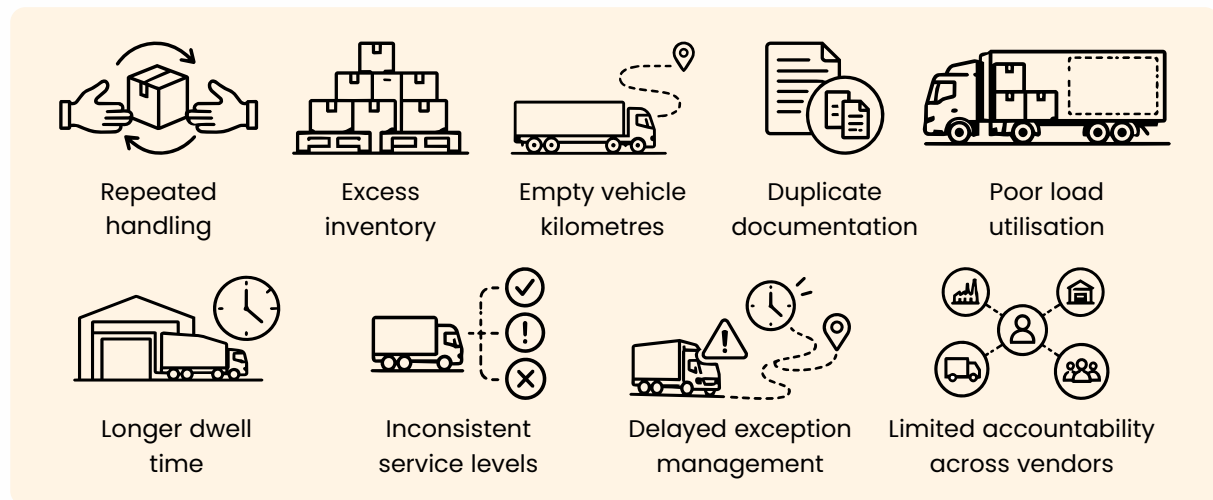
Cover Story

Manufacturers are increasingly evaluating logistics partners based on their ability to provide:

This shift is particularly important as production networks become more distributed. New manufacturing plants, supplier parks, export gateways and regional warehouses create additional flows that must be coordinated.

The cost of disconnection

A fragmented operating model creates several forms of hidden cost:



The financial impact may not appear in one logistics invoice. It may emerge as production downtime, urgent freight, excess working capital, missed vessel schedules, vehicle damage or lower customer satisfaction.

Integrated logistics addresses this problem by creating a single operating view across transport, warehousing, inventory and delivery.

A logistics partner creates strategic value when it reduces uncertainty – not merely when it reduces freight cost.



Cover Story

The shift from cost efficiency to resilience

The disruptions of recent years have altered how automotive companies assess supply-chain performance. Semiconductor shortages, pandemic-related bottlenecks, geopolitical tensions, shipping disruptions and fuel-price volatility exposed the limitations of supply chains designed only for normal conditions.

The objective is no longer simply to build the lowest-cost network. It is to build a network capable of absorbing shocks while maintaining production continuity.

This requires four capabilities:

Capability	What it means in practice
Visibility	Real-time understanding of inventory, transport and exceptions
Agility	Ability to change routes, suppliers or transport modes quickly
Resilience	Capacity, alternatives and buffers to manage disruption
Sustainability	Lower-emission transport, better utilisation and measurable carbon performance
Passenger-vehicle exports, FY2025–26	9.05 lakh
Two-wheeler exports, FY2025–26	51.8 lakh
Three-wheeler exports, FY2025–26	4.61 lakh

For manufacturers, resilience is therefore becoming a design principle rather than an emergency response.



Cover Story

2. 20,000 PARTS, ONE MOVING SYSTEM

A modern vehicle brings together thousands of components sourced through a multi-tier supplier network. These may include metals, plastics, tyres, electronics, semiconductors, wiring harnesses, braking systems, transmissions, batteries and software-enabled systems.

The challenge is not only to move these components. It is to deliver the right component:



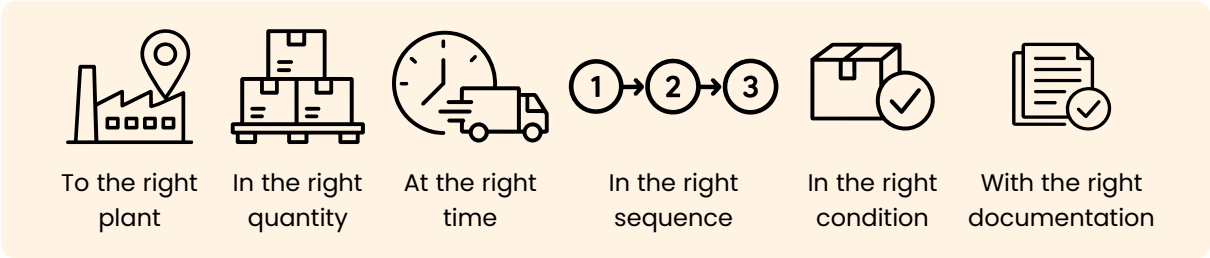
The race against the assembly line

Automotive production leaves limited room for delay. A missing component can interrupt a highly synchronised line, creating consequences that extend beyond the immediate shipment.

JIT and JIS systems reduce inventory and improve capital efficiency, but they increase dependence on logistics reliability. The lower the inventory buffer, the more important transportation visibility, supplier coordination and exception management become.

Cover Story

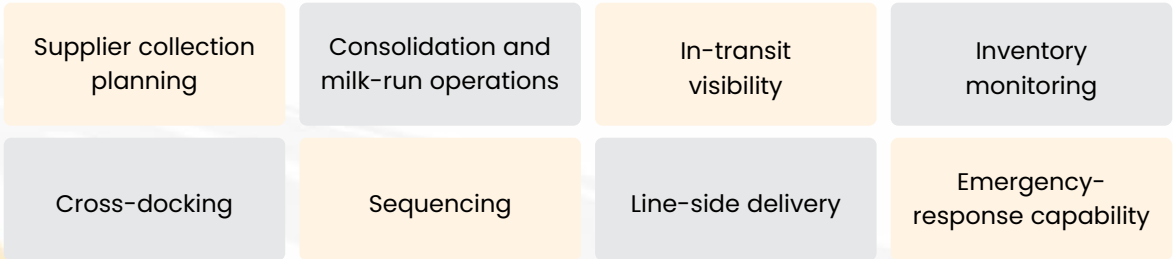
An effective inbound model must therefore combine:



In a JIT environment, a delayed shipment is not merely a transport exception; it can become a production event.

The changing role of inbound logistics

Inbound logistics is evolving from a transport activity into a planning and coordination function. A logistics provider may be required to coordinate several suppliers, consolidate parts, manage returnable packaging, monitor inventory, sequence components and deliver to multiple production lines.



The outcome is a supply chain that is not only faster, but more predictable.



Cover Story

3. ONE NETWORK, MULTIPLE MODES

No single mode can support the entire scale and complexity of India's automotive industry.

Road transport provides flexibility and last-mile access. Rail provides capacity and lower-emission long-haul movement. Coastal shipping can support large-volume flows between manufacturing regions and ports. Ports connect India's automotive ecosystem with global markets.

The opportunity lies in integrating these modes rather than treating them as isolated alternatives

Road: the flexible backbone.



Cover Story

In a JIT environment, a delayed shipment is not merely a transport exception; it can become a production event.

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Rail: from alternative to advantage

Rail is becoming increasingly important for finished vehicles and components moving over long distances. Its strengths include:



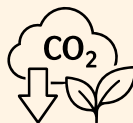
Higher
carrying
capacity



Lower cost
over long
distances



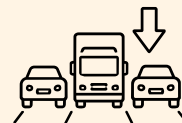
Reduced
dependence
on highway
capacity



Lower
emissions



Improved
asset
utilisation



Reduced
congestion

The expansion of Dedicated Freight Corridors, specialised automobile rakes, automobile terminals and multimodal facilities is creating a stronger foundation for rail-based automotive logistics.

A reported initiative of the Ahmedabad Division moved more than three lakh cars by rail between April 2025 and January 2026, with estimated carbon-emission avoidance of approximately 1.7 lakh tonnes.





Ports: strategic automotive gateways

As exports expand, ports are becoming strategic assets rather than simple transfer points.

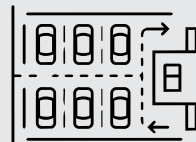
Automotive export operations require:



Vehicle
stockyards



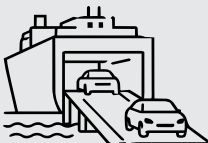
Pre-dispatch
inspection



Yard
planning



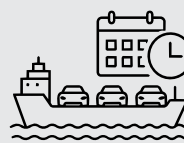
Customs
documentation



Ro-Ro
berths



Damage
prevention



Vessel
scheduling



Port-to-plant
coordination



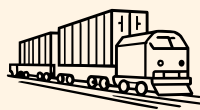


India's automotive export gateways including Chennai, Kamarajar, Mundra, Pipavav and Mumbai, connect domestic manufacturing clusters with markets across Africa, the Middle East, Latin America, South Asia and other regions.

A vehicle's competitiveness in an international market can be affected by dwell time at the port, missed vessel schedules, documentation errors and inland transport delays.

Coastal shipping: an additional layer of resilience

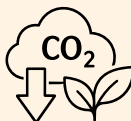
Coastal shipping can complement road and rail for suitable finished-vehicle movements. Its advantages include:



Large-volume
movement



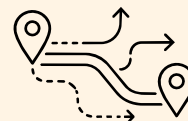
Lower fuel
consumption
per unit moved



Reduced
highway
dependence



Lower
emissions



Additional
route flexibility

Its wider adoption will depend on port connectivity, schedule reliability, vehicle-handling infrastructure and seamless first- and last-mile integration.

Cover Story

The multimodal operating model

A typical future movement may look like this:

A component travels by truck from a supplier to a consolidation centre, moves by rail to a manufacturing cluster, reaches the assembly plant through a scheduled road leg, and is tracked through a shared digital platform. A finished vehicle may then move by rail to a port, be loaded onto a Ro-Ro vessel and reach an overseas market through an integrated export chain.

Multimodal logistics is not simply a combination of modes. It is a coordinated operating model in which information, documentation, assets and accountability move together.



Cover Story

4. FROM VISIBILITY TO FORESIGHT

The automotive supply chain is entering an era in which information moves as critically as physical goods.

A logistics manager must increasingly know:

Where a shipment is

Whether it will arrive on time

Whether a supplier is at risk of delay

Whether inventory is sufficient

Whether transport capacity is available

Whether documentation is complete

Emergency-response capability



Cover Story

This is pushing the industry from tracking to prediction.

Digital control towers

A control tower consolidates operational information from suppliers, carriers, warehouses, plants, ports and distribution networks. Its purpose is not merely to display data, but to create a common operating view and support faster decisions.

A well-designed control tower can help teams:



Identify delayed shipments



Prioritise critical components



Reroute vehicles



Reallocate capacity



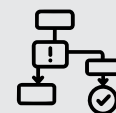
Coordinate production and logistics



Monitor inventory



Track service-level performance



Manage exceptions through defined workflows

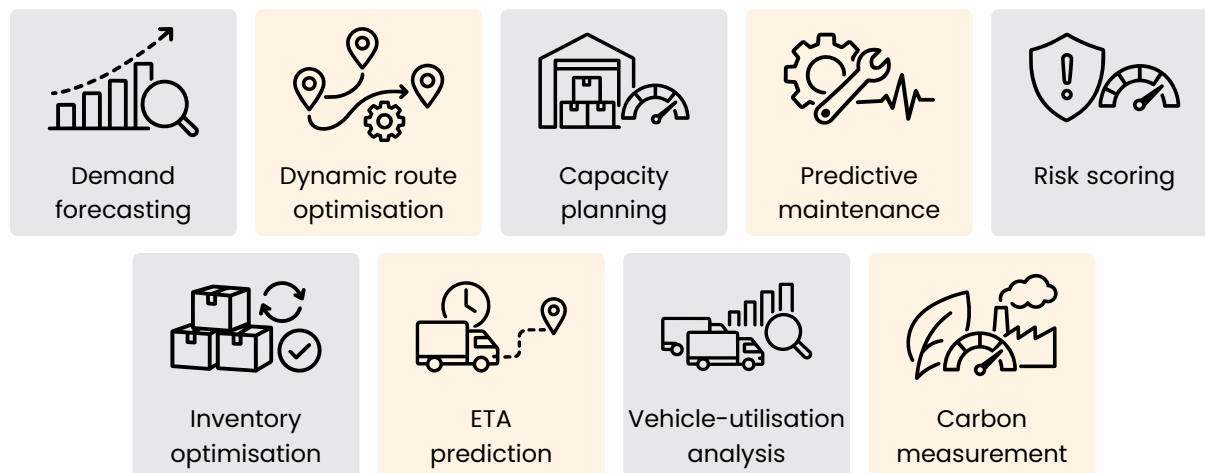
A control tower creates value when visibility leads to intervention – not when it merely produces another dashboard.



Cover Story

AI and predictive decision-making

AI and machine learning can support automotive logistics through:



The value of AI depends on the quality of data, system integration and operational adoption. A sophisticated model cannot compensate for incomplete information, inconsistent master data or unclear accountability.

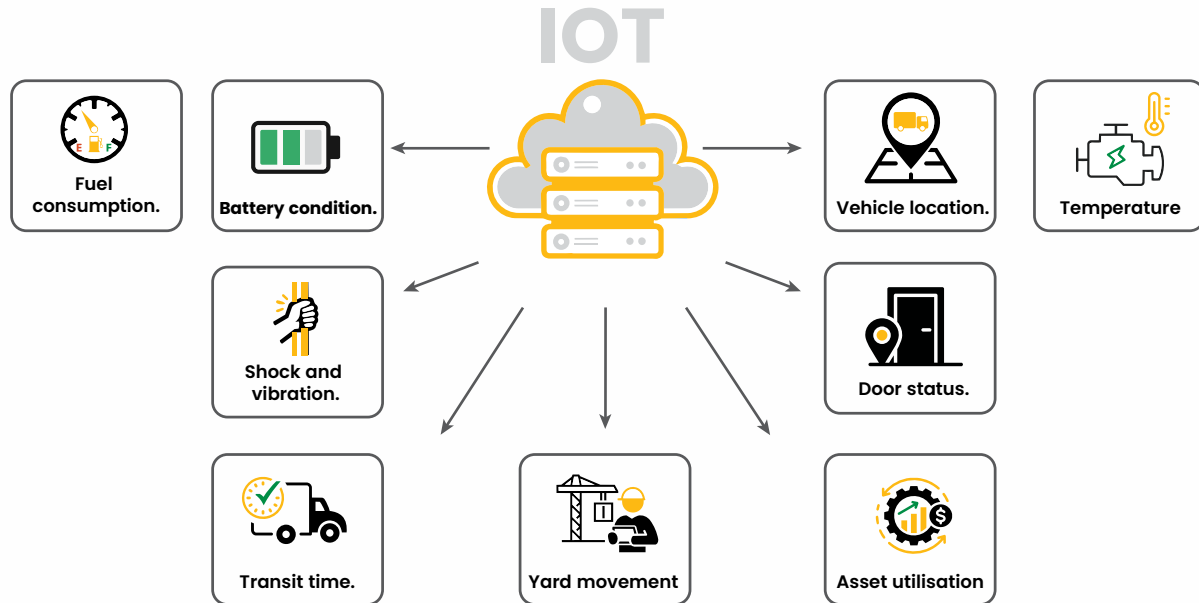
The most effective approach is therefore not “technology first.” It is process-led digitalisation supported by reliable data.

IoT and connected assets

IoT-enabled devices can provide real-time information on:

This information is particularly valuable for high-value components, batteries, export vehicles and time-sensitive inbound movements.

Cover Story



National digital infrastructure

India's logistics reforms are creating a wider digital environment for freight movement. The Unified Logistics Interface Platform is designed to facilitate data exchange across logistics-related government systems and improve information flow among stakeholders. PM Gati Shakti focuses on integrated infrastructure planning across roads, railways, ports, waterways and other logistics assets.

Together, physical and digital integration can reduce process fragmentation and improve the reliability of automotive supply chains.

The strategic opportunity is to connect enterprise systems with national platforms, transport assets and operational workflows.



Cover Story

From reaction to prediction

The transformation can be represented simply:

Traditional operating model	Intelligent operating model
Shipment tracking	Predictive ETA
Manual escalation	Automated exception alerts
Static routes	Dynamic route optimisation
Periodic reports	Real-time dashboards
Inventory counting	Continuous inventory visibility
Reactive maintenance	Predictive maintenance
Mode-by-mode planning	Integrated multimodal planning

The future logistics network will not be defined by the amount of data it generates. It will be defined by the quality and speed of the decisions it enables.

5. THE WAREHOUSE AS A PRODUCTION PARTNER

The automotive warehouse is no longer simply a place where components wait.

It is increasingly a production-support hub, sequencing centre, aftermarket fulfilment node, export facility and data point within the wider supply chain.



Cover Story

This transformation is particularly visible around India's major automotive clusters, including:

NCR and
Gurugram–
Manesar

Pune–
Chakan

Chennai–
Oragadam

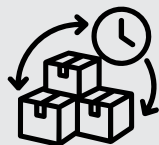
Sanand

Hosur

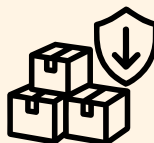
Bengaluru

Proximity creates responsiveness

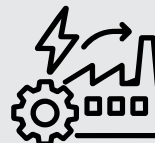
A warehouse located close to an assembly plant can support:



Multiple
replenishments
each day



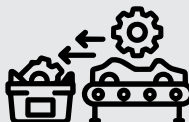
Lower safety
stock



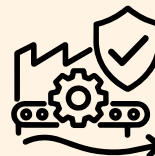
Faster response to
production changes



Reduced transport
distance



Better line-side
coordination



Lower risk of
production
interruption

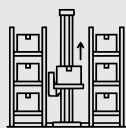
However, proximity alone does not create efficiency. The facility must be connected to supplier schedules, production plans, transport capacity and inventory systems.



Cover Story

Automation and accuracy

Modern automotive warehouses are adopting technologies such as:



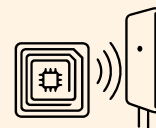
Automated
Storage and
Retrieval Systems



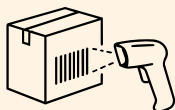
Automated
Guided Vehicles



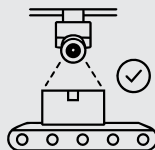
Autonomous
Mobile Robots



RFID
tracking



Barcode
traceability



Vision-based
inspection



AI-enabled WMS



Digital energy
monitoring

The objective is not automation for its own sake. It is to improve throughput, accuracy, safety and visibility while reducing avoidable manual intervention.

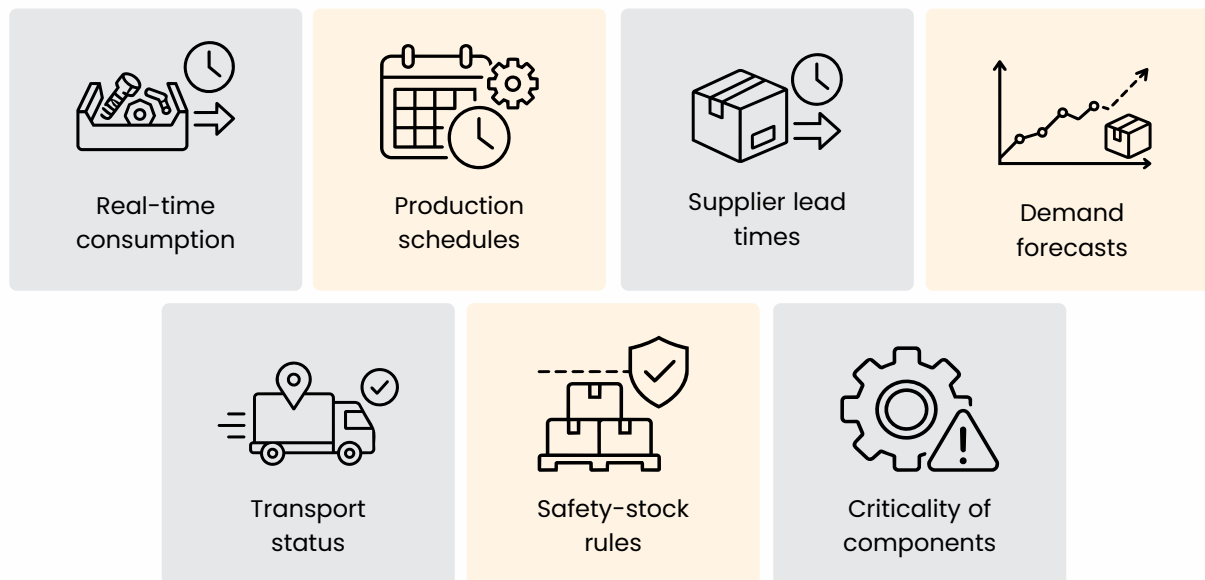
Inventory intelligence

Excess inventory ties up capital and increases storage costs. Insufficient inventory can interrupt production. The task is to maintain the right level of inventory at the right location with the right replenishment logic.



Cover Story

Digital inventory systems can combine:



This allows inventory decisions to move from static thresholds to dynamic intelligence.

The aftermarket dimension

Warehousing also supports the vehicle after it leaves the factory.

India's auto-component aftermarket reached ₹99,948 crore in FY2024-25, according to ACMA. The growth was supported by an expanding vehicle base, formalisation of the repair ecosystem, rural demand and e-commerce penetration.

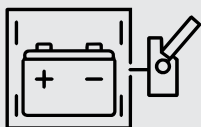
Regional distribution centres and digitally connected dealer networks can help reduce service delays and vehicle downtime.



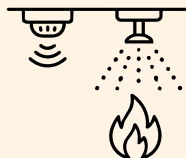
Cover Story

Preparing for batteries

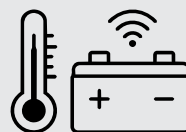
EV warehouses require specialised controls for:



Battery isolation



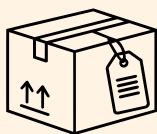
Fire detection and suppression



Temperature monitoring



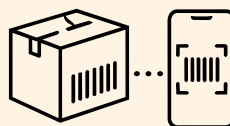
Hazardous-material handling



Packaging and labelling



Emergency response



Digital traceability



Reverse logistics

The warehouse of the future will therefore combine storage, fulfilment, compliance and lifecycle management.

In an industry where every minute of production counts, the smartest warehouse is often the one that remains invisible – delivering the right component at precisely the right time.



6. FROM FACTORY GATE TO GLOBAL MARKET

India's automotive industry is increasingly connected to global markets. In FY2025–26, exports reached 9.05 lakh passenger vehicles, 51.8 lakh two-wheelers, 4.61 lakh three-wheelers and 0.95 lakh commercial vehicles. Rising exports highlight the importance of efficient, reliable logistics.

The Export Chain

Vehicle exports typically involve:



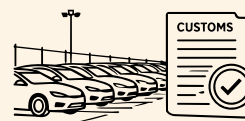
Factory dispatch
and consolidation



Inspection and
documentation



Inland transport
to port



Customs clearance and
yard management



Ro-Ro vessel loading
and ocean transport



Destination handling
and delivery

Each handoff can create delays, damage, documentation errors or visibility gaps.



Cover Story

Ro-Ro Logistics

Roll-on/Roll-off transport enables vehicles to be driven directly onto vessels, offering faster handling, lower damage risk, higher capacity and better schedule predictability. Effective port planning requires coordination of yards, inspections, vessel schedules, inland transport and customs.

Components Are Globalising Too

India is also expanding auto-component exports. In FY2024–25, North America accounted for 32%, Europe 29.5% and Asia 26% of exports. This creates demand for consolidation, multimodal transport, accurate documentation, customs support, damage prevention, visibility and gateway-based inventory.

Logistics as an Export Differentiator

Global customers increasingly assess on-time delivery, predictable transit, low port dwell time, damage-free movement, documentation accuracy, visibility, carbon performance and responsiveness. As Indian manufacturing becomes global, its logistics must evolve accordingly.

7. THE BATTERY CHANGES EVERYTHING

Electric mobility is transforming automotive supply chains by shifting value toward batteries, motors, power electronics, semiconductors, charging systems, software and critical materials. This creates new requirements for safety, traceability, compliance and lifecycle management.

The EV Logistics Chain

EV logistics now extends from raw materials and imported cells to battery assembly, vehicle production, replacement batteries, warranty returns, refurbishment, second-life use and recycling.

The PM E-DRIVE Scheme has already supported significant EV adoption, demonstrating that EV logistics is becoming a mainstream capability.

Safety and Traceability

Lithium-ion batteries require specialised packaging, labelling, storage, temperature monitoring, fire prevention, damage assessment, emergency response and regulatory compliance.





Digital traceability should cover battery identity, origin, health, safety status, warranty, transport conditions, repairs and end-of-life outcomes.

Commercial EVs and Circularity

Electric buses and trucks will increase requirements for charging infrastructure, fleet scheduling, battery monitoring, maintenance and recovery. The emerging circular model is:

Collection → Inspection → Grading → Refurbishment → Second Life → Recycling → Material Recovery

The automobile is increasingly becoming a digitally traceable lifecycle rather than simply a finished product.

Cover Story

8. THE CARBON COST OF EVERY MOVEMENT

Automotive logistics is moving beyond cost and speed toward emissions, energy efficiency and resource utilisation. Green logistics is becoming a business requirement.

Modal Shift

Rail and coastal shipping can reduce emissions, fuel consumption and road congestion while improving carrying capacity and asset utilisation.

Smarter Road Transport

Route optimisation, better load planning, fewer empty kilometres, preventive maintenance, alternative fuels, EVs and consolidated movements can improve road-transport efficiency.

Green Warehouses

Sustainability measures include solar power, LED lighting, efficient HVAC, rainwater harvesting, electric material-handling equipment, energy monitoring and sustainable packaging.

Carbon Accounting

Companies will increasingly track emissions by shipment and mode, energy use, distance, load utilisation, empty kilometres and renewable-energy use. Sustainability is becoming a measurable operating capability.



Cover Story

9. DESIGNING FOR THE NEXT DISRUPTION

Automotive supply chains face risks from geopolitical conflict, shipping disruptions, extreme weather, cyberattacks, material shortages, semiconductor constraints, fuel-price volatility, regulatory changes and demand shifts.

Building Resilience

Key measures include:



Resilience is not about duplicating everything; it is about identifying critical dependencies and having practical alternatives.



Cover Story

Critical Materials and Visibility

EV growth increases exposure to batteries, semiconductors and rare-earth materials. Logistics providers can support secure movement, specialised packaging, compliance, inventory positioning, supplier coordination and reverse logistics.

Visibility is the foundation of resilience. Companies need visibility across suppliers, orders, inventory, production, transport, ports, documentation and customer delivery.

A resilient supply chain is one that can detect, absorb and recover from disruption quickly.





10. THE NEXT DECADE WILL BE ORCHESTRATED

India's automotive logistics sector is entering a new phase driven by multimodal transport, connected warehouses, predictive analytics, digital control towers, supplier collaboration, EV capabilities, carbon measurement, reverse logistics and integrated exports.

From Integration to Intelligence

The next stage will combine:



Digital twins of
logistics networks



Predictive
ETAs



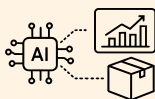
Autonomous
warehouses



Connected
fleets



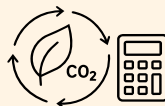
Dynamic
inventory
positioning



AI-supported
demand planning



Real-time
multimodal
coordination



Lifecycle carbon
accounting



Automated
exception
management

The greatest value will come from integrating these capabilities—connecting warehouse, transport, supplier, production and customer data to enable faster, smarter logistics decisions.



Cover Story

India's opportunity

India is investing simultaneously in:



Manufacturing
capacity



Transport
infrastructure



Digital public
platforms



Logistics
reform



Electric
mobility



Export
capability

The Government's logistics-cost assessment estimated logistics costs at 7.97% of GDP, using a methodology developed for DPIIT by NCAER. The assessment also emphasises the role of multimodality and infrastructure initiatives such as PM Gati Shakti, Dedicated Freight Corridors, Sagarmala and ULIP. This creates a strong foundation for the automotive industry. However, infrastructure must be converted into operational outcomes:



Faster
movement



Lower
dwell time



Better asset
utilisation



Reduced
inventory



Fewer
exceptions



Greater export
reliability



Lower
emissions

Cover Story

The logistics partner of the future

The logistics partner of the future will not be defined only by the number of vehicles, warehouses or terminals it operates.

It will be defined by its ability to orchestrate complexity.

That means bringing together:



The next breakthrough in automobile logistics will come not from moving more vehicles, but from making better decisions before they move.

01

CASE STUDY

Fragmented warehouses, manual processes and limited visibility were causing delays and From Fragmented Storage to Sequenced Supply

Regional Warehousing for JIT/JIS Automotive Operations



Context

A global automotive manufacturer with plants across North and West India needed a more efficient warehousing network to support JIT/JIS production. Fragmented warehouses, manual processes and limited visibility were causing delays and higher handling costs.

01 CASE STUDY



Key Challenges

- Fragmented inventory and warehouses.
- Manual processes and inaccuracies.
- High loading and transit dwell time.
- Limited real-time visibility.
- Supplier coordination issues.
- Rising operating costs and inbound-delay risks



TCI Intervention: TCI developed an integrated regional warehousing model focused on proximity, visibility and sequencing, including:

- Two regional distribution centres near key plants.
- RFID-enabled inventory tracking and integrated WMS.
- Dedicated JIS sequencing zones.
- GPS-enabled dedicated fleets.
- Vendor collaboration portals and shared dashboards.
- Route optimisation and consolidated transportation.



Impact: The warehouse evolved from a storage facility into a production-support platform, delivering

- Better line-side availability.
- Higher inventory accuracy.
- Faster material throughput.
- Improved supplier coordination.
- Better exception management.
- Lower logistics and operating costs.



Key takeaway: The solution synchronised inventory, sequencing, transport and supplier coordination into one integrated supply system.



02

CASE STUDY

One Control Tower, Complete Supply-Chain Visibility

A Single-Window Model for Domestic, Inbound, Outbound and EXIM Operations



Context

An automotive customer managing multiple logistics partners lacked a unified view of shipments, inventory, documentation, port operations and delivery performance.

02 CASE STUDY



Key Challenges

- Multiple logistics providers.
- Fragmented inbound and outbound operations.
- Complex order and inventory management
- EXIM and port-handling complexities.
- Limited end-to-end visibility.
Rising operating costs.



TCI Intervention: TCI implemented a control-tower-led single-window logistics model comprising:

- Centralised domestic logistics through a freight desk.
- Customised control-tower portal.
- Dedicated relationship management
- Integrated distribution-centre operations.
- EXIM clearance and port handling.
- Containerisation and multimodal logistics.
- Centralised operational monitoring.



Impact: The warehouse evolved from a storage facility into a production-support platform, delivering

- Single-window visibility.
- Improved on-time delivery at optimised cost.
- Simplified vendor management.
- Better inventory control.
- Greater accountability.
- Easier material handling.
- Stronger HSE compliance.
- Lower emissions through containerisation and multimodal transport.



Key takeaway: The control tower became a decision-support platform, turning visibility into accountability, faster intervention and better execution.

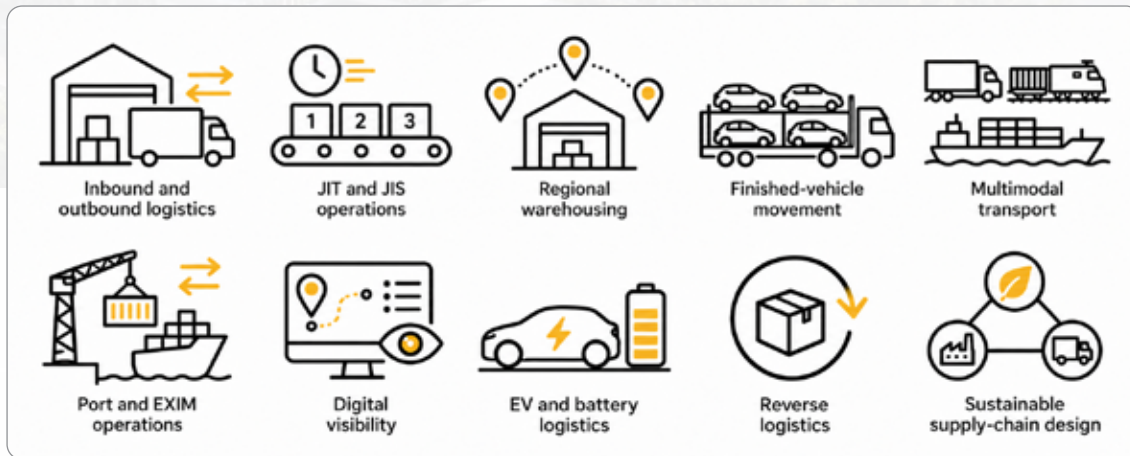
TCI Perspective

Orchestrating automotive complexity

Automotive logistics increasingly requires the coordination of transport, warehousing, sequencing, documentation, technology and risk management.

The logistics provider's role is therefore expanding from execution to orchestration. The objective is to create a connected operating model that gives manufacturers greater control across the vehicle lifecycle.

For automotive customers, this means a partner that can support:



The strongest solutions will combine operational depth with digital intelligence.

Automotive logistics is no longer about moving a vehicle from one point to another. It is about synchronising the ecosystem that makes the movement possible.

Industry outlook

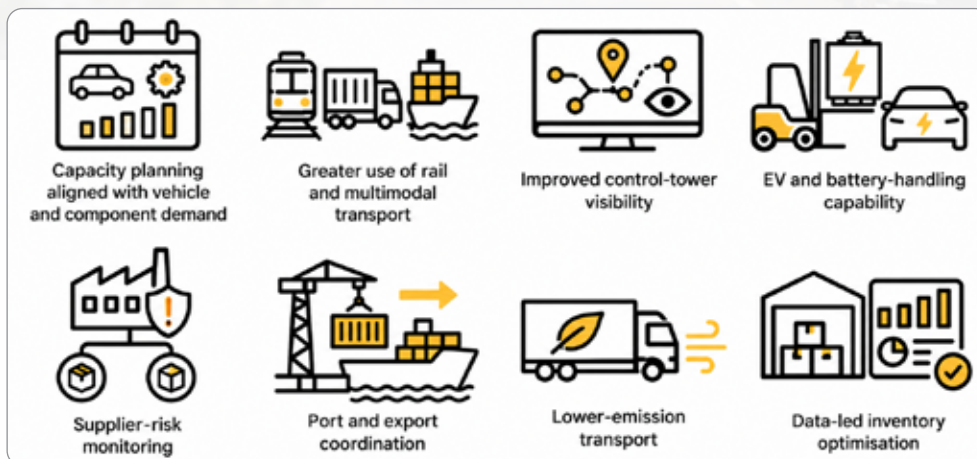
FY2026–27: growth with conditions

India's automotive industry entered FY2026–27 with strong momentum following record FY2025–26 sales. SIAM expects growth to continue across vehicle categories, supported by domestic demand and favourable macroeconomic conditions. At the same time, the industry remains exposed to geopolitical uncertainty, commodity and crude-oil prices, exchange rates and shipping-route disruptions.

For logistics leaders, this creates a dual requirement:

- Support growth without compromising service reliability.
- Build contingency capability without adding unnecessary cost.

The operational priorities for the year ahead are likely to include:



The industry's next phase will reward companies that can balance efficiency with adaptability.



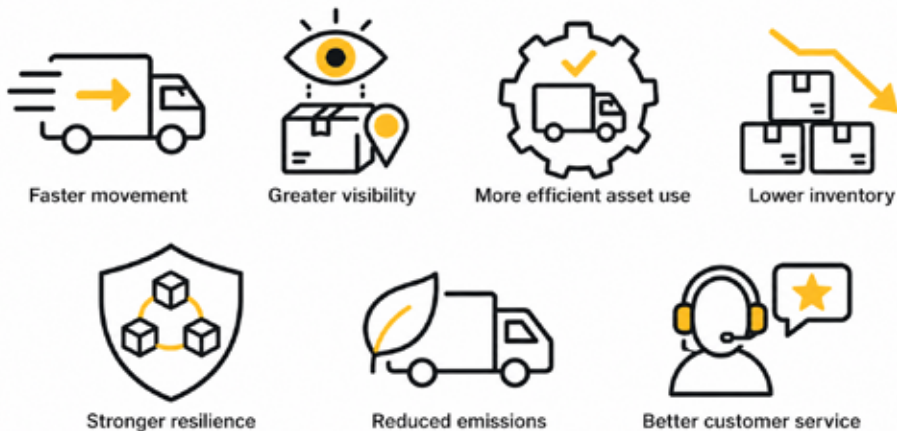
Logistics will deliver the future

India's automotive sector stands at a defining moment. Rising domestic demand, record vehicle exports, expanding component manufacturing, electric mobility and infrastructure investment have positioned the country among the world's most dynamic automotive markets.

Yet as the industry scales, its future competitiveness will depend as much on logistics excellence as on manufacturing capability.

The transformation is already underway. Road, rail, ports, warehouses, digital platforms and supplier networks are being connected into a more integrated operating ecosystem. The focus is shifting from isolated transactions to end-to-end orchestration.

For automotive companies, the strategic opportunity is to translate this foundation into better execution:



The automobile of the future will be defined not only by how it is engineered, but also by how efficiently it is sourced, manufactured, transported, delivered and supported throughout its lifecycle. India's automotive journey is therefore no longer about moving vehicles from factory to customer. It is about orchestrating the supply chains that connect manufacturing competitiveness with customer experience, export performance and sustainable growth.

India's automotive future will be built in factories—but its competitiveness will be delivered through logistics.

Corporate Updates



Achievements & Recognition

Best 3PL Company at the 17th Edition of the Express Logistics & Supply Chain Leadership Awards 2026.



TCI Supply Chain Solutions was honoured with the Best 3PL Company award at the 17th Edition of the Express Logistics & Supply Chain Leadership Awards 2026, recognizing its commitment to delivering innovative, customer-centric, and integrated logistics solutions. The award reflects the company's continued focus on operational excellence, supply chain innovation, and delivering exceptional value to its customers.

Silver Shipping Line Excellence Award for the FY 2025-26

TCI Seaways has been honoured with the Silver Shipping Line Excellence Award for FY 2025-26 by the New Mangalore Port Authority. The recognition reflects TCI Seaways' continued commitment to operational excellence, reliable service, and efficient maritime logistics, reinforcing its efforts towards delivering seamless and dependable shipping solutions for customers.



Corporate Updates

TCI announced Q1 FY 27 Financial Results



TCI began FY27 on a resilient note, supported by operational discipline, strong multimodal capabilities, and the continued trust of our customers. During Q1 FY27, consolidated revenue grew by 9.1%, while EBITDA increased by 5.2%. On a standalone basis, revenue grew by 7.5% and EBITDA by 1.6%. PAT stood at (0.6%) on a consolidated basis and (3.5%) on a standalone basis. As we move forward, we remain focused on

strengthening our AI-led logistics capabilities, expanding our network, and building global capabilities.

The All-New TCI EXPRESS Mobile App is Now Live!

TCI EXPRESS has launched its new Mobile App for Android and iOS users, offering a range of enhanced features for a seamless customer experience. Key features include personalised dashboards, real-time shipment tracking, freight estimation, pickup scheduling, pin code and branch locator services, access to digital documents, business appointment booking, and a dedicated grievance redressal module.

The app is designed to provide customers with faster access to services and greater visibility into their shipments.



Corporate Updates



New and Media Coverages

Lead the Next | Mr. Vineet Agrawal in Conversation with Mr. Pranjal Sharma



Mr. Vineet Agarwal, MD-TCI, joined Pranjal Sharma on the first episode of the LeadTheNext podcast series by SHRM India, where he shared his perspectives on leadership, business transformation, talent development and building future-ready organizations.

The conversation explores how leaders can navigate rapid technological shifts while keeping people at the center of change.

Interaction with ET Now on the evolving logistics landscape

Mr. Vineet Agarwal, MD- TCI, joined ET Now for an insightful discussion on the evolving logistics landscape. He shared his perspectives on the impact of rising fuel costs, changing trade dynamics, and evolving customer expectations on the industry. Mr. Agarwal also highlighted TCI's continued focus on strengthening its multimodal capabilities to build resilient, efficient, and customer-centric supply chain solutions for the future.



Corporate Updates



Events Participation



**Leading Without a Map: A Conversation
on Logistics in Infinite Uncertainty**



**17th Express Logistics & Supply Chain
Conclave**



**CII conference on construction
equipments**



**Financial Express India & Workday
Leadership Roundtable**



Corporate Updates



13th Edition of Global Supply Chain Summit



ASSOCHAM Pharma Summit



CII conference on construction equipments



TCI EXPRESS Participates in ET Edge SCM Fest 2026



7th CII Conference on
Railways Excellence – 2026

Corporate Updates



TCI EXPRESS at ET Infra Rail Show 2026



TCI EXPRESS at India Warehousing Show 2026



TCI EXPRESS at ET Aerospace & Defence Manufacturing Summit 2026, Bengaluru



TCI EXPRESS at 7th Rail & Metro Technology Expo 2026 and Bharat Tex 2026



Manufacturing and Supply Chain Summit 2026



Gas India Expo 2026

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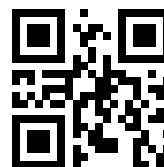


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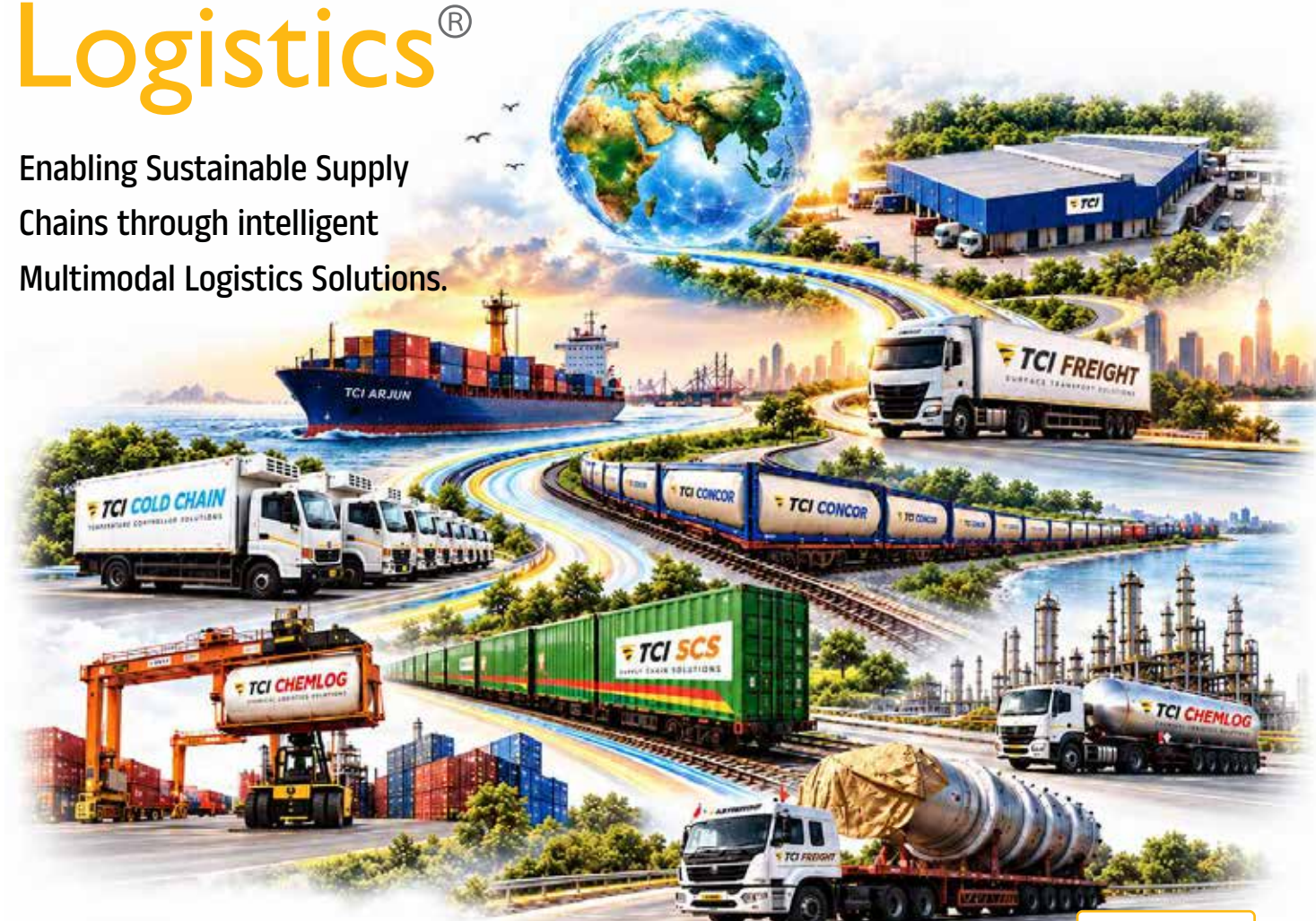
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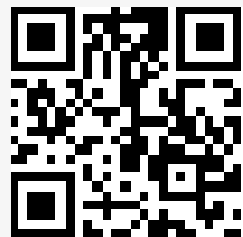


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