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FUTURE CITIES

Empowering India's Industrial and Logistics Growth: The Strategic Role of Eastern India

REPORT

INDIA
REAL ESTATE

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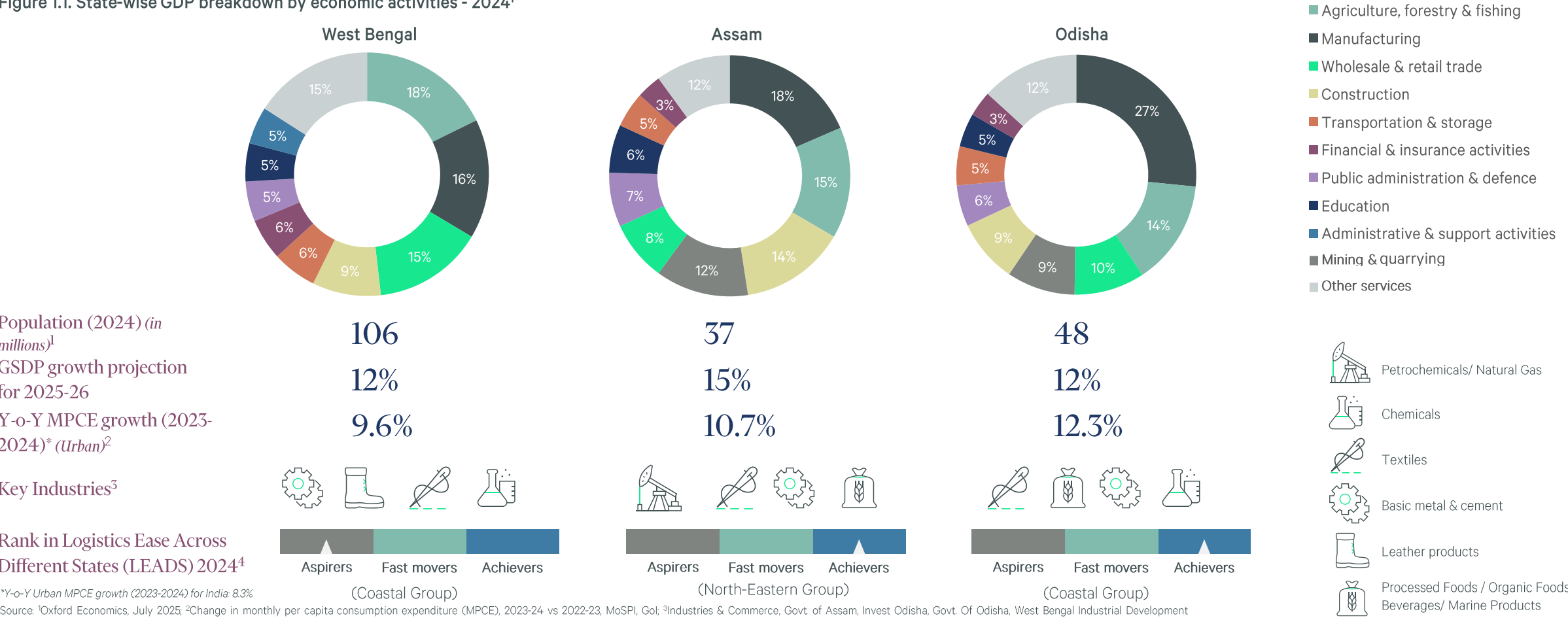
01

Spotlight on
Eastern India:
Catalysing the
Nation's I&L Future

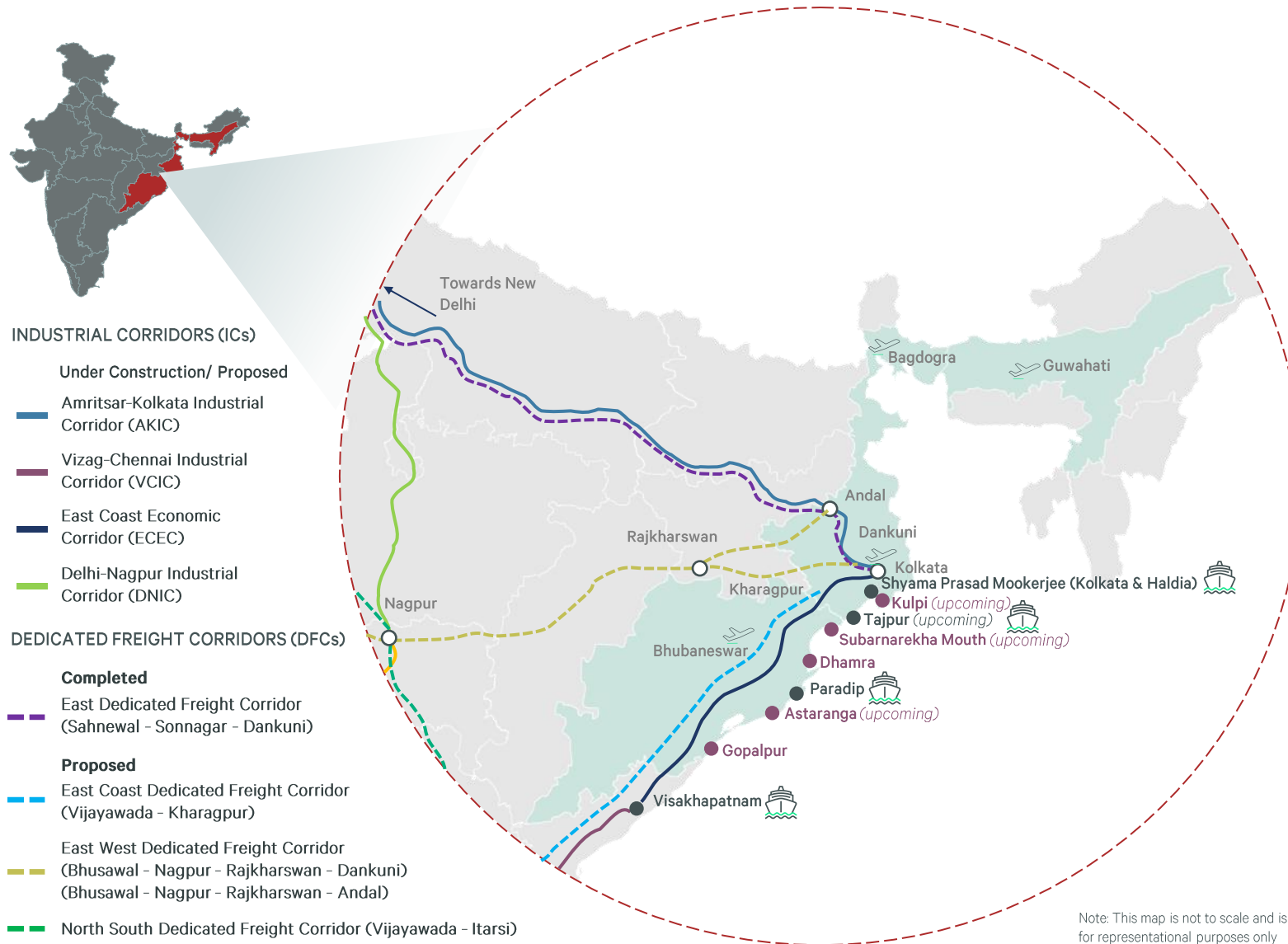
Emerging Hub: Eastern India’s Evolving I&L Landscape

India’s Eastern zone, comprising key states such as West Bengal, Assam, and Odisha, is fast-emerging as a critical node in India’s industrial and logistics (I&L) ecosystem. Strategic infrastructure upgrades, coupled with targeted policy support, are propelling the region into a core growth geography for the country’s supply chain network. In recent years, initiatives such as Bharatmala and Sagarmala, along with the development of industrial corridors, dedicated freight corridors, ports, and docks, have collectively underpinned the region’s connectivity and efficiency. This has spurred higher investments across petrochemicals, food processing, metals, and textile manufacturing sectors. Key cities such as Kolkata and Bhubaneswar benefit from robust land and sea connectivity, while Guwahati’s strategic location serves as a crucial gateway to enable a strong I&L economy in Northeast India.

Figure 1.1. State-wise GDP breakdown by economic activities - 2024¹



Key Infrastructure Initiatives in Eastern India



Infrastructure Projects Fuelling Economic Growth

Eastern India's robust physical infrastructure continues to drive its economic development. The region's well-established network of roads, airports, railways, and ports supports efficient connectivity, enabling I&L growth and facilitating global and domestic trade. Upcoming infrastructure projects are expected to cement Eastern India's position as a key node in national and cross-border logistics networks.

Airports

West Bengal – 2 International, 1 Domestic
Assam – 1 International, 5 Domestic
Odisha – 1 International, 1 Domestic

Railways

West Bengal – 4,000+ Route Kms
Assam – 2,000+ Route Kms
Odisha – 2,000+ Route Kms

National Highways

West Bengal – 3,000+ Kms
Assam – 4,000+ Kms
Odisha – 5,000+ Kms

Ports

West Bengal –	Odisha –
Existing – 2 Major Ports	Existing – 1 Major Port,
Upcoming – 1 Major Port,	2 Non-major Port
1 Non-major Port	Upcoming – 2 Non-major Ports

*Major ports considered as given by the Ministry of Ports, Shipping & Waterways;
Source: National Industrial Corridor Corporation, GoI; Dedicated Freight Corridor Corporation, GoI; Ministry of Ports, Shipping & Waterways, GoI; Ministry of Railways, GoI; Ministry of Road Transport and Highways, GoI; Respective state government ministries; CBRE Research, Q3 2025

Note: This map is not to scale and is for representational purposes only

Key Policies Fostering Growth

Over the years, West Bengal, Odisha, and Assam have introduced multiple progressive policies aimed at promoting investments, strengthening infrastructure, and accelerating industrial and logistics development. These comprehensive policies offer a wide array of incentives to enhance regional competitiveness, drive future growth, and shape the states' economic and real estate dynamics.

Table 1.1. Recent policy initiatives impacting Eastern India’s Industrial & Logistics landscape

Policy	Land-related incentives	Capital subsidy	Stamp duty exemptions	Tax benefits	Infrastructure development concessions & subsidies	Ease of doing Business	Skill development / employment	R&D grants / initiatives	Incentives/ development of Industrial/ logistics parks	Promote green initiatives
West Bengal Logistics Policy, 2023	⊖	⊖	⊖	⊖	✓	✓	✓	✓	✓	✓
West Bengal Industrial and Economic Corridor Policy, 2023	⊖	⊖	✓	⊖	✓	✓	⊖	⊖	✓	✓
West Bengal Export Promotion Policy, 2023	⊖	⊖	⊖	⊖	✓	✓	✓	✓	⊖	⊖
Odisha Logistics Policy, 2022	✓	✓	✓	⊖	✓	✓	✓	✓	✓	✓
Odisha Port Policy, 2022	⊖	⊖	⊖	✓	✓	✓	✓	✓	⊖	✓
Odisha Industrial Policy Resolution, 2022	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Odisha Export Policy, 2022	⊖	✓	⊖	⊖	✓	✓	✓	✓	✓	⊖
Industrial and Investment Policy of Assam, 2019 and 2023 (Amendment)	✓	✓	✓	✓	✓	✓	⊖	⊖	⊖	✓
Assam Logistics and Warehousing Policy, 2022	⊖	✓	✓	⊖	✓	✓	✓	✓	✓	✓

Source: Respective state government ministries; CBRE Research, Q3 2025

Note: In a few cases though the policy do not directly mention about a particular incentive, an indication of indirect initiatives have been considered as a 'tick' mark

An aerial night photograph of a large industrial park. Several large, rectangular warehouse-like buildings with flat roofs are illuminated from within, casting a warm glow. A multi-lane highway runs along the right side of the image, with cars visible as streaks of light. The surrounding landscape is dark, with some trees and distant city lights visible under a cloudy night sky.


02

A Snapshot of the Key I&L Markets in Eastern India

West Bengal
Kolkata

Assam
Guwahati

Odisha
Bhubaneswar



Strategic geographical positioning, robust logistics ecosystems, and key manufacturing hubs have positioned Kolkata, Guwahati, and Bhubaneswar as crucial anchors of Eastern India's I&L growth story. Supportive policies and multi-sector private investments have also enabled these cities to strengthen trade with neighbouring states and countries and drive developments of logistics parks and industrial estates.

The following sections offer a city-level deep dive into how each contributes to Eastern India's I&L growth.

01

Kolkata

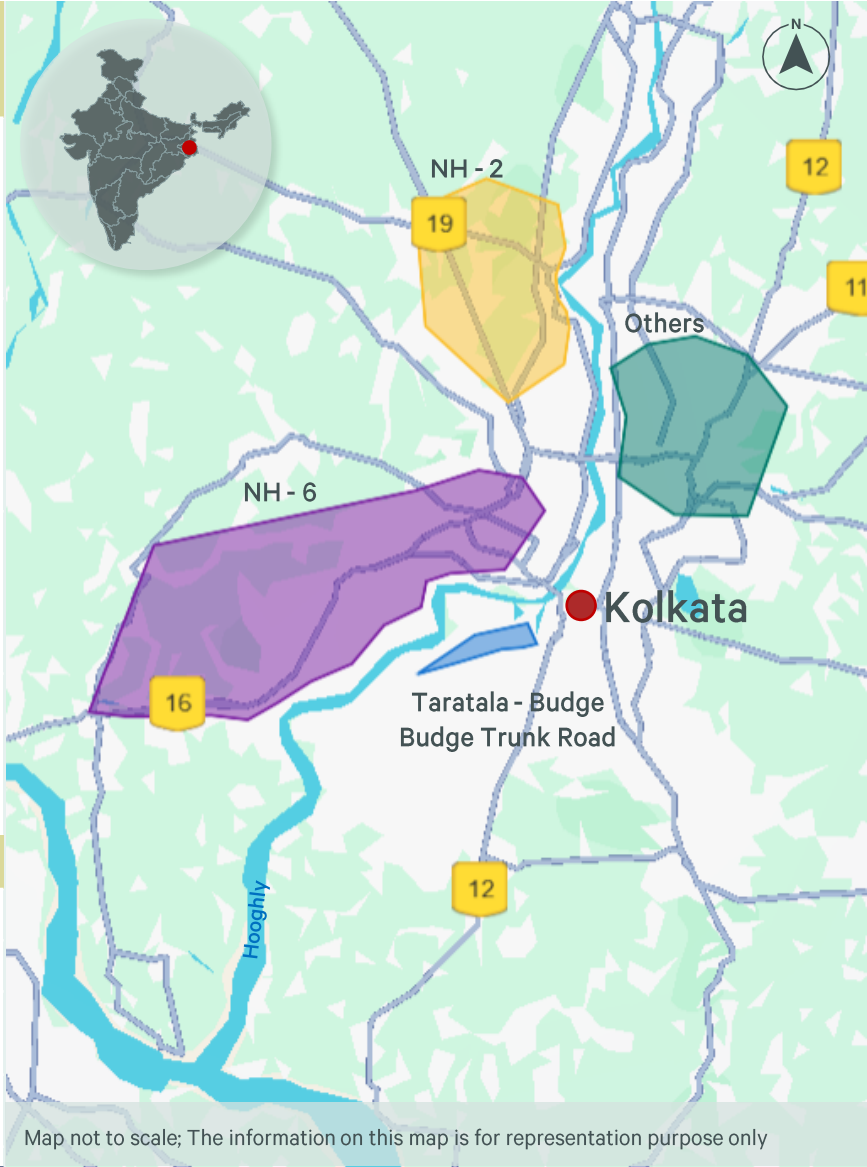
A major industrial and logistics (I&L) hub in Eastern India, Kolkata benefits from access to both land and sea trade routes. Its strategic location, well-developed infrastructure, and strong connectivity with neighbouring countries such as Nepal, Bhutan and Bangladesh position Kolkata as the region's crucial logistics node.



Table 2.1: Key I&L micro-markets

Micro-market	Locations	Stock (million sq. ft.)	Average I&L rents (INR / sq. ft. / month)	Prominent sectors	Key tenants
NH - 2	Dankuni-Srirampur, Old Delhi Road, Kona, Panchla and Singur	~ 8.9	21-23	E-commerce, Telecom, FMCG, Automobile	Reliance, Flipkart, Amazon, Nestle, Whirlpool, Bosch, Toyota, Samsung
NH - 6	Amta Road, Dhulagarh-Bagnan, Sankrail, Uluberia, Santragachi and Saraswati Bridge	~ 13	19-22	FMCG, Engineering, E-commerce, FMCD, Automobile	ITC, Amazon, Flipkart, Reckitt Benckiser, Honda Motors, Colgate, Castrol, Dabur, Bajaj Electric, Snowman
Taratala - Budge Budge Trunk Road	Taratala and Budge Budge Trunk Road	~ 1.0	23-27	FMCG, Pharma, E-commerce	VRL Logistics, Reliance, KD Logistics, Laxmi Tea, TVS Logistics, HUL, Udaan
Others	Agarpara, Barasat, Khardaha, BT Road, Birati, Badu Road, Nimta	~ 0.4	-	3PL, Retail, Engineering & Manufacturing, E-commerce	Sigma Power Logistics, Great Eastern Retail, IP Integrated Services, Berger Paints

Micro-market	Accessibility	Physical infrastructure	Ease of doing business	Social infrastructure
NH - 2	●	●	●	●
NH - 6	●	●	●	●
Taratala - Budge Budge Trunk Road	●	●	●	●
Others	●	●	●	●



Map not to scale; The information on this map is for representation purpose only

Source: CBRE Research, Q3 2025

● Excellent ● Good ● Average

The Road Ahead

Kolkata’s strategic geographical location and robust infrastructure cement its position as a key commercial and communications hub in Eastern India. Its proximity to the Bay of Bengal, along with strong connectivity via the Golden Quadrilateral and national highways, supports logistics, warehousing, and seamless access to major markets.

Upcoming key infrastructure projects to power the sector’s expansion

- ▶ **Dedicated Freight Corridors:** With the Eastern Dedicated Freight Corridor (EDFC) having launched in 2023, Eastern India's logistics operations are poised for a major leap in efficiency and cost savings. This is particularly true for logistics parks such as SFA Logistics Park in Dankuni, which is strategically situated to capitalise on the enhanced rail freight movement provided by the EDFC.
- ▶ **Port Expansions and New Developments:** Eastern India is experiencing a surge in port infrastructure development driven by substantial investments. This includes an INR 7.4 billion project by JSW Infrastructure to modernise and mechanise berths at Netaji Subhas Dock, nearly doubling its container capacity¹. The Haldia Dock Complex (HDC) is also expanding through a PPP model, targeting a handling capacity of 75 MMT by 2040². Furthermore, the development of the Tajpur Port and the Kaladan Multi-modal Transit Transport Project promise to significantly bolster regional trade³.
- ▶ **Kaladan Multi-Modal Transit Transport Project (KMMTTP):** This is a pivotal infrastructure initiative to connect India’s Northeast via Myanmar, bypassing the Siliguri Corridor. This project will create a multi-modal corridor using sea, river, and road routes from Kolkata to Mizoram through Sittwe Port, reducing logistics costs by 30-40% and transit times to 3-4 days. It aims to enhance trade ties with Southeast Asia under the 'Act East' policy, and is expected to boost regional integration and drive demand for logistics infrastructure⁴.
- ▶ **Airport expansion:** Kolkata Airport is significantly boosting its cargo handling capabilities. A 12-acre residential plot near Gate 1 is being converted into a new cargo complex, allowing for westward expansion across VIP Road. To connect this new facility seamlessly with the airport's existing operational area, a tunnel is currently under construction⁴.

Policy support

- ▶ **West Bengal Logistics Policy 2023:** Aims to streamline and strengthen the state's logistics sector, targeting a 40% reduction in logistics costs over five years. Key initiatives include granting 'Industry Status' to logistics, offering access to land banks, state benefits, favourable power tariffs, and easier capital. The core goal of this policy is to create a more efficient and sustainable logistics system⁵.
- ▶ **World Bank Support:** To enhance logistics and trade in West Bengal, the World Bank is providing US\$150 million (loan approved April 2024, effective May 2025). The program aims to improve efficiency by reducing land mutation timelines, forming a Logistics Development Council, easing border crossings, and increasing energy-efficient cold storage capacity⁶.

Source: ¹JSW Infrastructure, July 2025; ²Ministry of Ports, Shipping, and Waterways, April 2025; ³Media Article, June 2025; ⁴Media Article, July 2025; ⁵Government of West Bengal, November 2023; ⁶World Bank, May 2025;

Figure 2.1. Existing and emerging I&L markets in Kolkata



Existing I&L markets	Emerging I&L markets
NH – 6	1 Bagnan
NH – 2	2 Singur
Others	3 Telipukur
Taratala - Budge Budge Trunk Road	4 Kalyani Expressway
	5 Madhyamgram

02 Guwahati

Known as the Gateway to Northeast India, Guwahati serves as a critical hub in the region's I&L landscape, supported by seamless connectivity with other Northeastern states, proximity to international borders, and its role in the BBIN* Motor Vehicle Agreement.

*BBIN: Bangladesh, Bhutan, India and Nepal



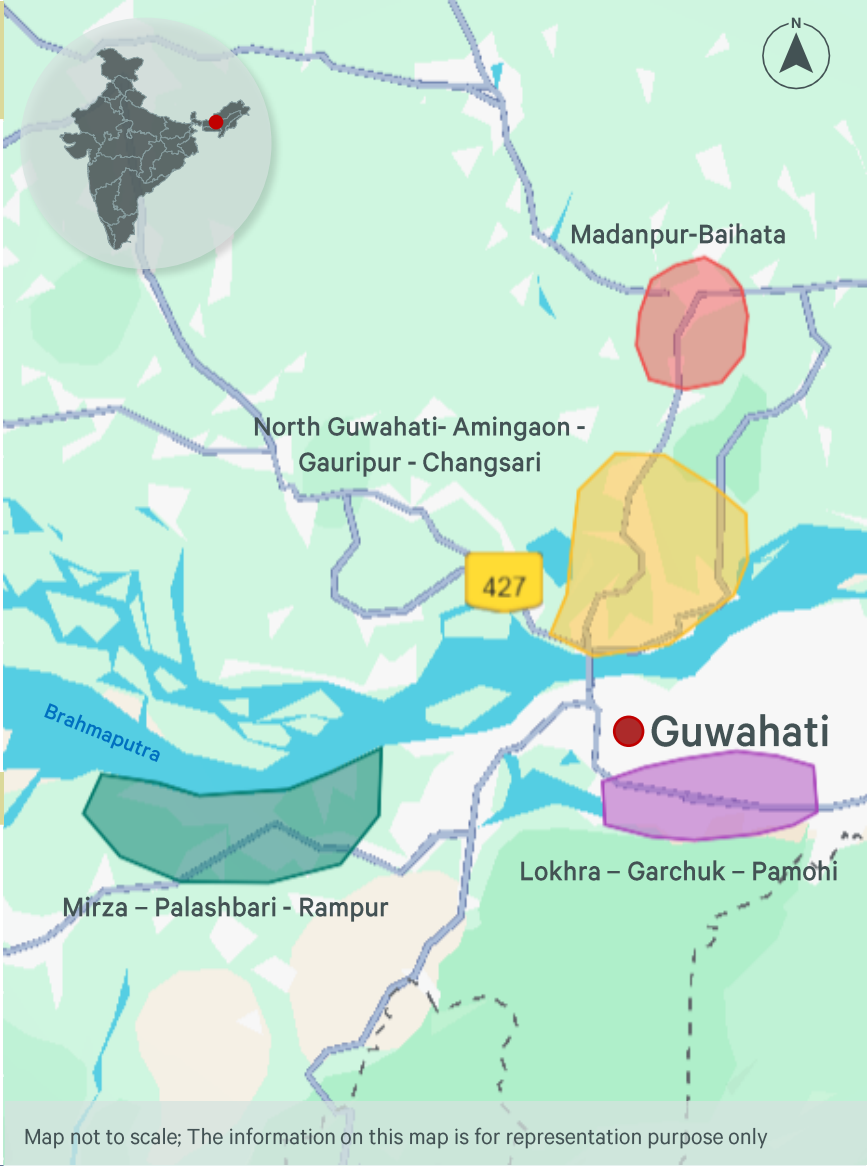
Table 2.2: Key I&L micro-markets

Micro-market	Locations	Stock (million sq. ft.)	Average I&L rents (INR / sq. ft. / month)	Prominent sectors	Key tenants
North Guwahati- Amingaon - Gauripur - Changsari	Gauripur, Changsari	~ 5.5	20-24	FMCG, FMCD, Manufacturing, 3PL	HUL, Nestle, Godrej Consumer, Reliance, Marico, Haldiram's, P&G, ITC, Coca-Cola
Madanpur	Madanpur, Chariali	~ 2.1	16-19	FMCG, FMCD, 3PL, E-commerce	Mahindra Accelo, Dabur, Tata Consumer, Asian Paints, Reliance Retail
Lokhra – Garchuk – Pamohi	Lokhra, Garchuk, Pamohi	~ 2.4	22-24	E-commerce, FMCG, 3PL	Adani Wilmar, Pedilite, BigBasket, Vodafone Idea, Unicharm, Sony India, KD Logistics, Blue Dart, Cadbury(Mondelez)
Mirza – Palashbari - Rampur	Mirza, Palashbari, Rampur	~ 4.4	20-24	E-commerce, 3PL	Flipkart, Airtel, Nykaa, Mahindra Logistics, Swiggy, Myntra,. ITC Limited
Micro-market	Accessibility	Physical infrastructure	Ease of doing business	Social infrastructure	
North Guwahati- Amingaon - Gauripur - Changsari	●	●	●	●	
Madanpur-Baihata	●	●	●	●	
Lokhra – Garchuk – Pamohi	●	●	●	●	
Mirza – Palashbari - Rampur	●	●	●	●	

● Excellent

● Good

● Average



Source: CBRE Research, Q3 2025

The Road Ahead

Guwahati is strengthening its position as a central hub for logistics and transportation in Northeast India, driven by its strategic location and growing economy. The city serves as a critical link, connecting the region's seven states to the rest of India and neighbouring countries, including Bangladesh and Bhutan. A robust industrial base and its position as the main hub for wholesale trade are driving a significant increase in logistics demand.

Upcoming key infrastructure poised to bolster sector's expansion

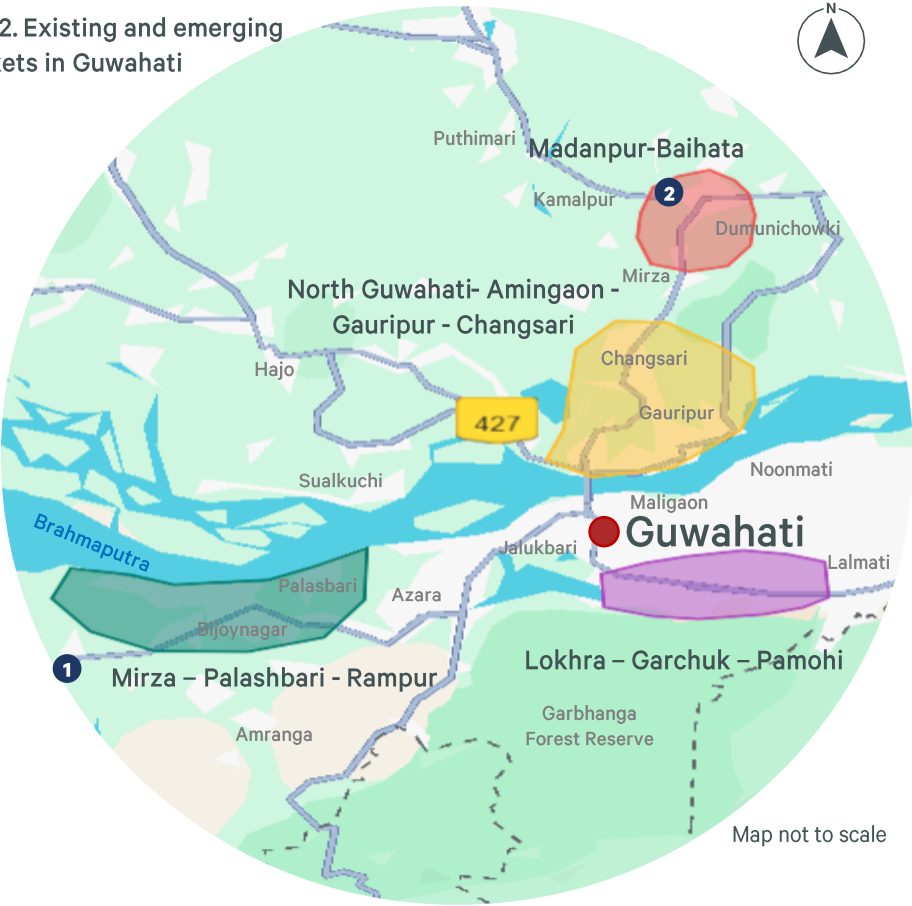
- ▶ **Multi-Modal Logistics Parks (MMLPs):** India's first international Multi-Modal Logistics Park (MMLP) is set to become operational in Jogighopa, Assam, by 2026. This government-funded project under the Bharatmala scheme is designed to be a central distribution point for the entire Northeast region and will also facilitate cross-border trade with Bangladesh, Bhutan, and Nepal. The park will feature comprehensive logistics facilities, including **warehouses, cold storage, and customs clearance services**. A second MMLP is also being developed in Dibrugarh to further enhance regional trade and logistics across all major transportation modes¹.
- ▶ **Road and rail network expansion:** The Northeast Indian region's logistics network is being significantly enhanced through extensive road and rail infrastructure projects. Major road expansions are underway through government initiatives such as the Special Accelerated Road Development Programme and Bharatmala scheme. Furthermore, the Railways Ministry has approved plans for new rail lines from Guwahati to Tezpur and Silghat, which will provide rail access to previously unconnected cities².

Policy support

- ▶ **Assam Logistics and Warehousing Policy 2022:** The policy supports economic growth by making it easier for MSMEs and startups to get funding through agreements with Credit Guarantee Fund Trust for Micro and Small Enterprises (CGTMSE) and SIDBI Venture Capital³.

Source: ¹Press Information Bureau, May 2023, July 2025; ²Ministry of Railways, April 2025; ³Assam Logistics and Warehousing Policy, 2022.

Figure 2.2. Existing and emerging I&L markets in Guwahati



Existing I&L markets	Emerging I&L markets
Mirza – Palashbari - Rampur	
Lokhra – Garchuk – Pamohi	1 Chhaygaon
North Guwahati- Amingaon - Gauripur - Changsari	
Madanpur-Baihata	2 Baihata

03 Bhubaneswar

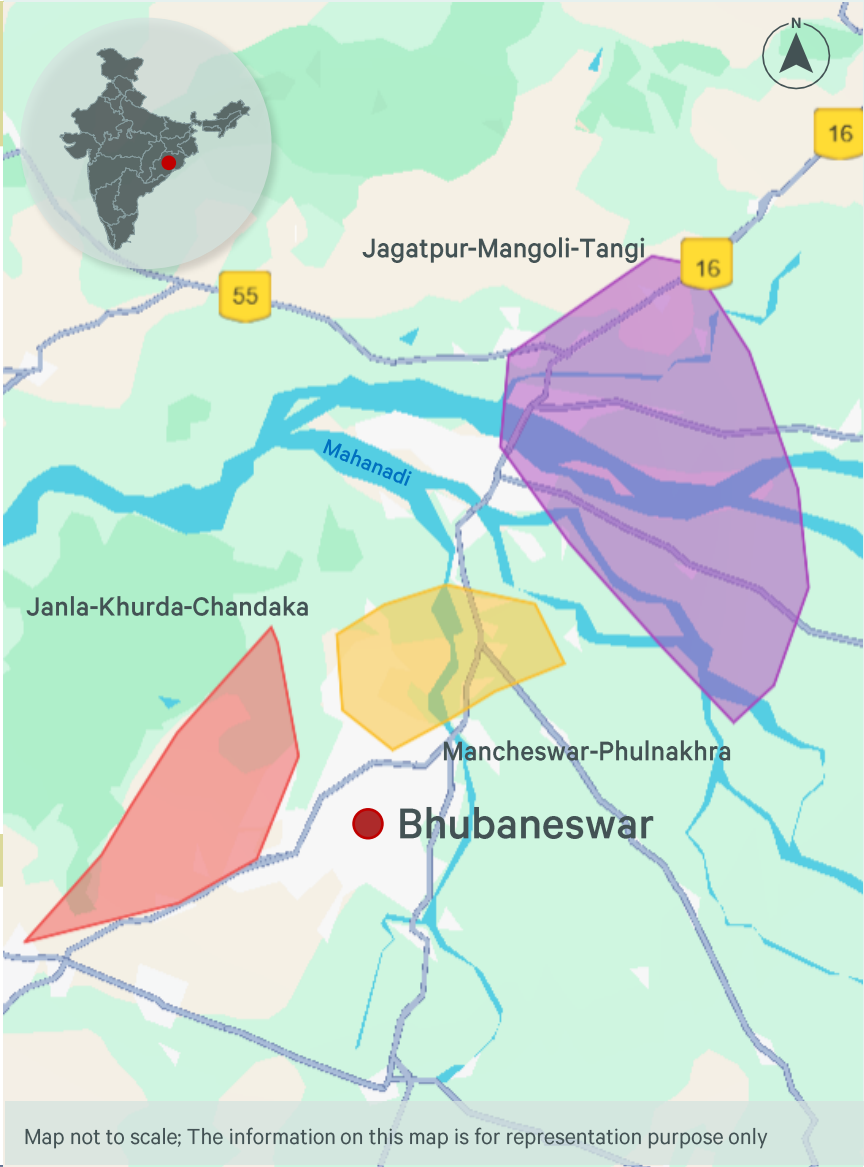
The city's proximity to ports and robust connectivity with surrounding regions, among other factors, make it an emerging I&L centre in Eastern India.



Table 2.3: Key I&L micro-markets

Micro-market	Locations	Stock (million sq. ft.)	Average I&L rents (INR / sq. ft. / month)	Prominent sectors	Key tenants
Mancheswar-Phulnakhara	Mancheswar, Phulnakhara, Pahala	~ 1.5	26-30	FMCG, FMCD, 3PL	Delhivery, Blue Dart, Udaan, BigBasket, VRL Logistics, Asian Paints, XpressBees
Janla-Khurda-Chandaka	Janla, Khurda, Chandaka	~ 2.6	19-23	FMCG, FMCD, 3PL, E-commerce	Asian Paints, Dabur, TVS Logistics, Safexpress, Swiggy, Reliance, Godrej, Coca Cola
Jagatpur-Manguli	Jagatpur, Manguli	~ 2.5	18-22	FMCG, FMCD, 3PL, E-commerce	Reliance, Flipkart, Mondelez, Parle Agro, Marico

Micro-market	Accessibility	Physical infrastructure	Ease of doing business	Social infrastructure
Mancheswar-Phulnakhra	●	●	●	●
Janla-Khurda-Chandaka	●	●	●	●
Jagatpur-Mangoli-Tangi	●	●	●	●



Source: CBRE Research, Q3 2025

● Excellent ● Good ● Average

The Road Ahead

Bhubaneswar is rapidly emerging as a major logistics hub in Eastern India due to its robust transport network and pivotal location. The city's significance as a commercial centre for steel and aluminium industries, proximity to key ports, and Odisha's abundant mineral resources, are collectively driving the need for more warehousing and streamlined logistics solutions.

Upcoming key infrastructure poised to bolster sector's expansion

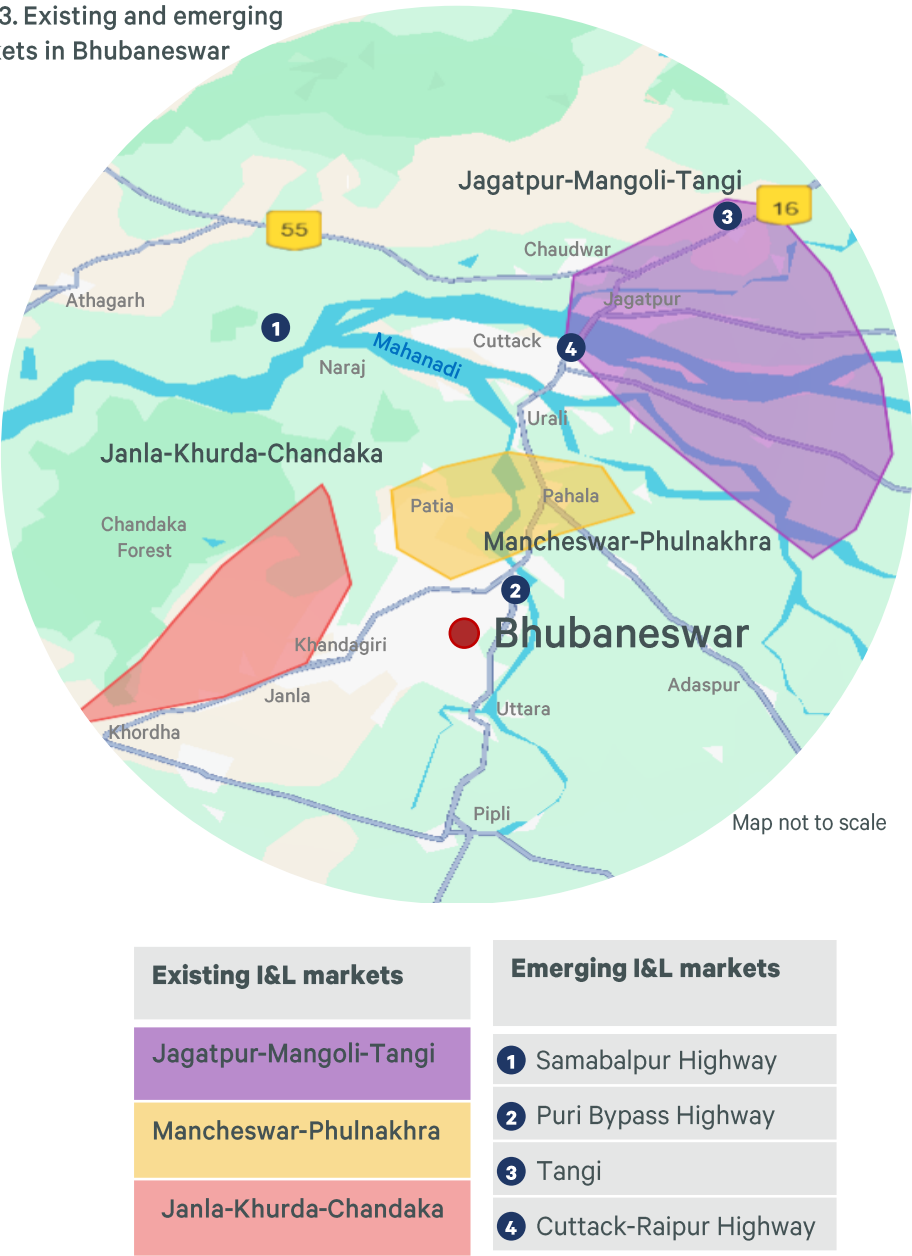
- ▶ **Port expansion:** Paradip Port is undergoing a major expansion with the development of its Western Dock. This project is on track to increase the port's capacity by 25 MMT and will enable it to handle large capsized vessels by 2026¹.
- ▶ Adani Ports is undertaking a major expansion of Dhamra Port, aiming to increase its cargo handling capacity to 300 million tonnes annually by the year 2030, supported by the construction of 35 berths².

Policy support

- ▶ **Odisha Logistics Policy 2022:** Odisha's logistics policy prioritises better connectivity, infrastructure mapping, and port-led growth. Private developers receive incentives such as land discounts and tax breaks for building logistics facilities. The policy also supports skill development through training and encourages technological innovation with financial aid and an Innovation Fund, while mandating land allocation for essential infrastructure³.
- ▶ **Ease of doing business:** Odisha's business-friendly policies are boosting industrial growth, and consequently, the logistics sector. The state has adopted a single-window clearance system which streamlines processes and expedites approvals. Furthermore, this system reduces delays and minimises human interaction, ensuring timely project clearances for investments of all sizes.

Source: ¹Paradip Port Authority, August 2025; ²Media Article, November 2016; ³Odisha Logistics Policy 2022

Figure 2.3. Existing and emerging I&L markets in Bhubaneswar



03

Kolkata A Deep Dive





Kolkata's I&L Market: Supply and Absorption Dynamics

Largely driven by the NH-2 and NH-6 micro-markets, demand for warehousing space in Kolkata soared after the COVID-19 pandemic, registering a **CAGR of 34% since 2020**. **Approximately 80%** of the space leased since 2020 was absorbed between 2022 and 2024, aided by large supply additions in 2022 and 2023. Notably, leasing activity in 2024 **more than doubled from the previous year, reaching 6.6 million sq. ft.**

During the first half of 2025, **~3.3 mn sq. ft. of space was leased — implying a 12% year-over-year increase** — exhibiting sustained momentum and indicating a strong finish for the year.



29+

million sq. ft. of warehousing stock, as of H1 2025



~ USD 122 million¹

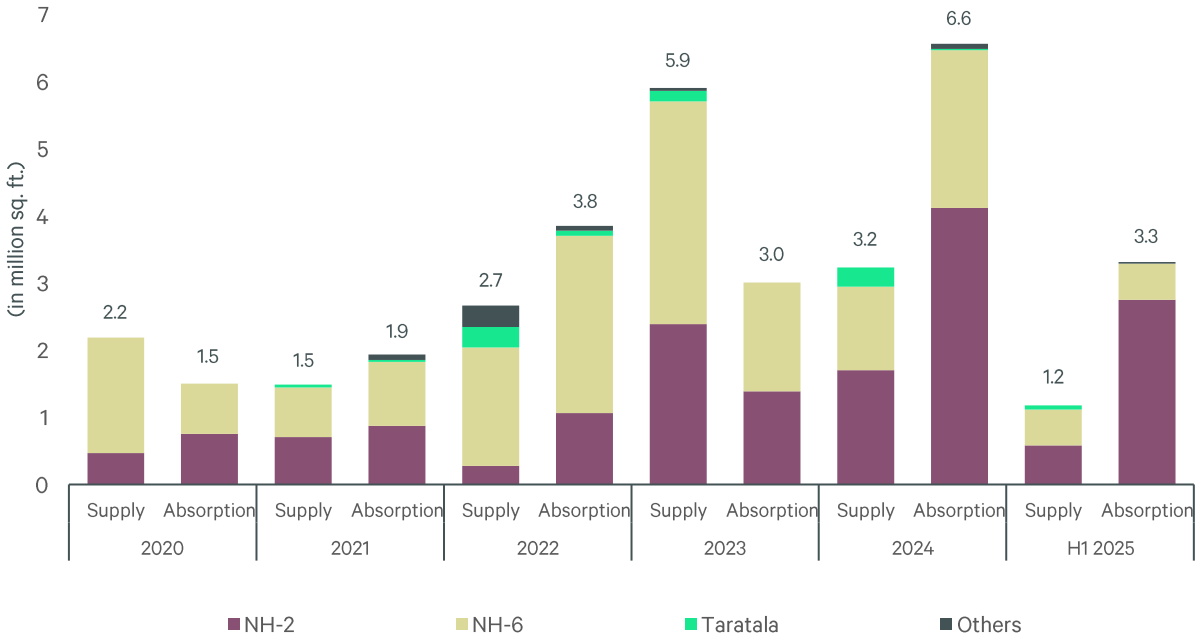
I&L Investments during 2020-H1 2025

Drivers of Warehousing Demand: Sectoral View

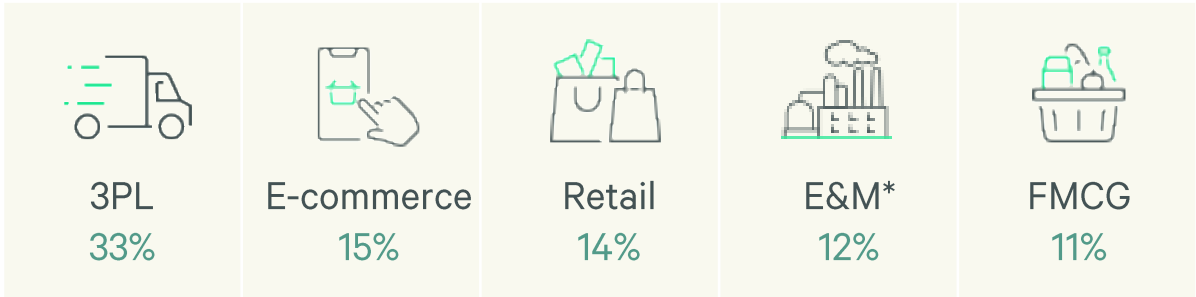
Since 2020, third-party logistics (3PL) providers have consistently led space take-up in Kolkata, mirroring broader trends observed across India. Post-pandemic, occupiers blended strategies of ‘just-in-time’ and ‘just-in-case’ inventory management to optimise storage and delivery, helping ease challenges around longer lead times. However, in H1 2025, the e-commerce sector recorded a sharp surge in leasing activity, largely driven by major e-commerce and quick-commerce companies, which accounted for over 80% of the sector's take-up.

Source: ¹Real Capital Analytics, CBRE Research, Q3 2025

Figure 3.1. Kolkata's I&L supply and absorption (2020-H1 2025)



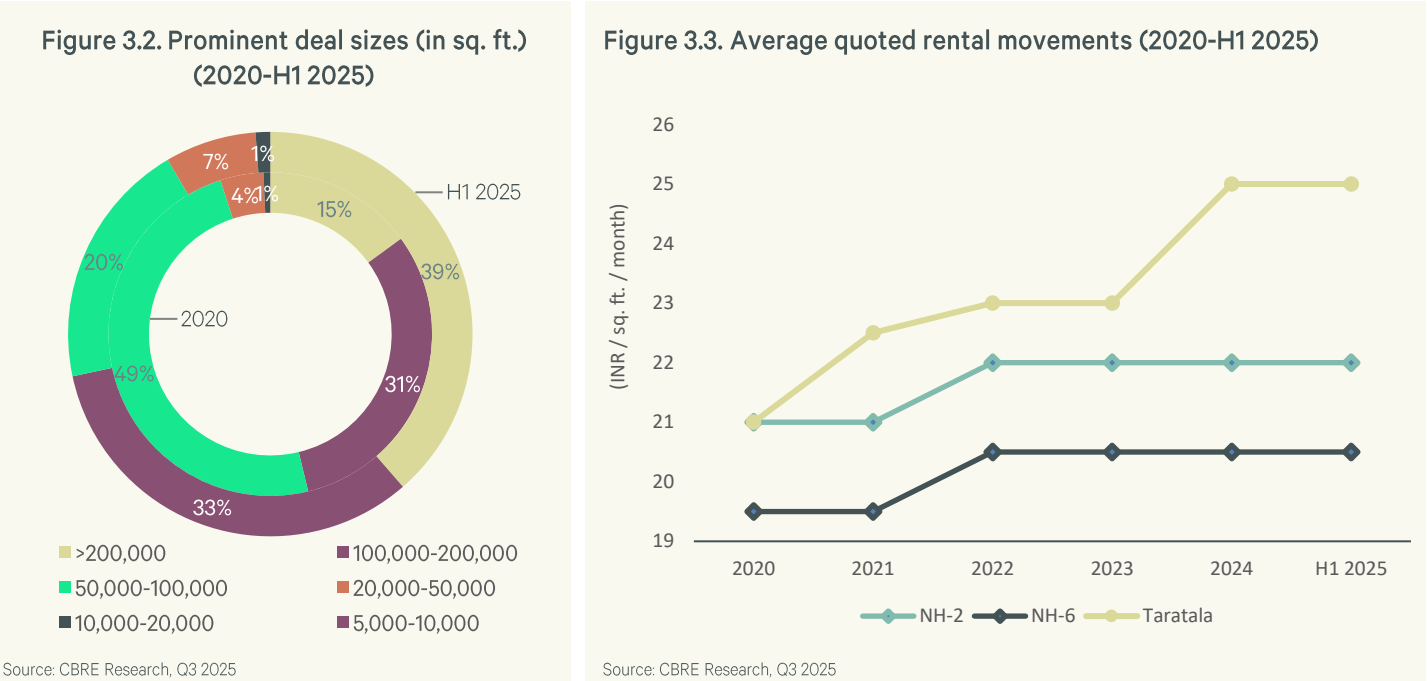
Top 5 sectors driving ~80% absorption from 2020-H1 2025



* E&M: Engineering and Manufacturing | Source: CBRE Research, Q3 2025

Dominance of Large-Scale Warehouse Transactions

Large-sized transactions (>100,000 sq. ft.) have been on an upward trajectory since 2020, accounting for a dominant share of leasing activity in 2024 (~57%) and H1 2025 (~72%). Occupiers from the 3PL, e-commerce, and E&M sectors led large-sized warehouse deal closures during the period.



Rental Trends

Average quoted rentals across two key micro-markets, NH-2 and NH-6, have remained largely stable since 2022, owing to pent-up supply additions in 2022 and 2023. However, rental values are expected to witness marginal upward movement by end-2025 and in the years ahead, supported by increased absorption, rising construction, fit-out, and land costs. Additionally, the introduction of high-quality warehouses by institutional players is likely to command rental premiums, further lifting average quoted rents.

The Taratala micro-market has consistently recorded higher rental values, compared with other locations, primarily due to limited supply and its location within the city, catering well to urban demand. In contrast, NH-6 continues to offer the most competitive rental options because of its peripheral location in the city.

Source: CBRE Research, Q3 2025



Key I&L Players in Kolkata

Amta Industrial Park, Prospace Industrial Park, CCI Logistics, and ESR Group are among the key developers with existing projects in the city. A majority of the city's warehousing stock is concentrated along two major corridors: NH-6 and NH-2. The NH-6 corridor holds the largest share at 56%, followed by NH-2 with a 37% share.

Approximately 80% of the future supply is anticipated to be developed by a few major players, such as Aarna Projects, Ganesh Complex, Ascendas Firstspace, Srijan Industrial and Logistic Park, and Maple Logistics.

NH - 6

Existing developments

- 1 Daga Complex
- 2 Sankrail Industrial Park
- 3 Poly Park
- 4 Ganesh Complex
- 5 NDR Warehousing
- 6 ESR Group
- 7 Uluberia Industrial Park
- 8 Amta Industrial Park

Upcoming developments

- 1 Ascendas Firstspace
- 2 Ganesh Complex

NH - 2

Existing developments

- 9 Prospace Industrial Park
- 10 CCI Logistics
- 11 Shyam Business Park
- 12 Diamond Logistics Park

Upcoming developments

- 3 Prospace Industrial Park
- 4 Aarna Projects
- 5 Maple Logistics

Others

Upcoming developments

- 6 Srijan Industrial and Logistic Park

Figure 3.4. Key developers with present and upcoming developments across micro markets



Source: CBRE Research, Q3 2025

Map not to scale; The information on this map is for representation purpose only



An aerial photograph of a multi-lane highway curving through a green, hilly landscape. A large white truck is driving on the highway, casting a shadow. The background shows rolling hills and some trees under a clear sky.

04

Eastern India's Ascending Logistics Dominance: The Way Forward

Eastern I&L: Navigating the Challenges

While Eastern India's I&L ecosystem holds strong growth potential, a proactive approach to address key challenges is crucial for maximum impact. Some priority areas include managing land costs, streamlining regulations, expanding the skilled labour pool and strengthening connectivity with other Northeastern states. Below are some key areas that need attention to provide a boost to the I&L landscape in Eastern India:



Land Acquisition and Ownership Issues

- **Fragmented Ownership:** Land parcels in many areas tend to be small and dispersed, making large-scale development planning more complex and time-consuming.
- **Legal Complexities:** Navigating land ownership and regulatory approvals often involves multiple steps and stakeholders. These processes, while necessary for compliance, can occasionally extend project timelines.



Operational Challenges

- **Logistics Cost Pressures:** Businesses have to navigate a cost-intensive logistics environment, influenced by systemic inefficiencies and evolving infrastructure standards.
- **Transport Modal Imbalance:** Freight movement typically relies more on road transport while keeping rail and coastal modes underutilised, impacting cost efficiency and sustainability.
- **Warehousing Gaps:** While modern warehousing is gaining traction, the availability of high-grade and specialised facilities such as cold storage remains limited in several pockets.
- **Connectivity Limitations:** Last-mile deliveries in semi-urban and rural areas are sometimes constrained by road quality and network reach, which may result in delays and increased operational overheads.



Regulatory and Policy Complexities

- **Diverse Regulatory Frameworks:** Developers have to navigate a variety of rules and compliance requirements across jurisdictions. This diversity, while reflective of regional governance, lead to delayed approvals and elevated costs.
- **Approval and Documentation Processes:** Securing necessary permissions and completing documentation can involve multiple steps. While these are essential for regulatory compliance, multiplicity of authorities results in delays and confusion around the final approving authority.
- **State-Level Variations:** Differences in administrative practices and business facilitation across states can create varying experiences for developers operating in multiple locations. Continued alignment and coordination efforts can help to address these gaps.



Cultivating Skilled Talent

- **Evolving Skill Requirements:** The sector is increasingly adopting advanced technologies and equipment, which calls for a workforce trained in modern logistics practices. However, there remains a gap between current skill levels and emerging operational needs.
- **Attractiveness of Logistics Careers:** Logistics roles, especially in freight transport and warehouse operations, are often perceived as less appealing due to challenging working conditions and limited visibility into long-term career growth. This poses challenges in attracting and retaining talent.
- **Workforce Development Needs:** There is a growing need for structured training and upskilling programs, especially in Tier 2 and Tier 3 cities. Strengthening these initiatives will be critical to build a future-ready workforce capable of supporting the sector's growth.

Source: CBRE Research, Q3 2025

Connecting the Dots: The Path Forward

A number of infrastructure and policy initiatives are underway in Kolkata, Guwahati, and Bhubaneswar, which are expected to lay the foundation for the growth of the I&L sector in the region. Some of these key measures are enlisted below:



Enhancing Regional Connectivity

- The eastern logistics corridor — connecting Kolkata, Guwahati, and Bhubaneswar and supported by PM Gati Shakti, Bharatmala, and Sagarmala — is a key driver of improved supply chain efficiency across India. With its strategic importance in facilitating Southeast Asian trade and serving the consumer markets of the East and Northeast, the corridor is critical in positioning the region for sustained growth.



Policy Support Across States

- West Bengal's 2023 Logistics Policy aims to strengthen the sector by granting industry status, providing access to dedicated land banks, and offering financial incentives. The policy's core objective is to streamline business processes, and reduce the state's logistics costs by 40% by 2028. The state is also committed to improving the ease of doing business through Silpasathi, a single-window clearance system designed to streamline regulatory compliance.¹
- West Bengal's EV Policy (2021) and CNG Conversion Project (2023)², along with Odisha's 2022 Logistics Policy (offering technology adoption incentives), showcase a shared commitment to enhancing long-term operational efficiency through green and tech-driven advancements. Furthermore, plans are underway for a new West Bengal State Industrial Policy aimed at boosting the MSME ecosystem.



Focus on Sustainable Manufacturing

- The West Bengal New and Renewable Energy Manufacturing Promotion Policy 2023 (NREMPP) aims to foster a renewable energy manufacturing ecosystem in West Bengal. It incentivizes both large and small-scale manufacturers, including MSMEs and vendors, with benefits such as land fee waivers, stamp duty exemptions, and tax concessions. The policy also supports job creation, skill development, and technology adoption, with a focus on MSMEs and EV manufacturers. Furthermore, it's designed to boost the state's logistics sector, complementing the West Bengal Logistics Policy 2023³.

“With its strategic importance in facilitating Southeast Asian trade and serving the consumer markets of the East and Northeast, the region is poised for sustained growth”

Source: ¹West Bengal's Logistics Policy 2023; ²Government of West Bengal, November 2023; ³West Bengal New and Renewable Energy Manufacturing Promotion Policy 2023 (NREMPP)

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