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As vaccine supply firms up, so do companies in the chain

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Voltas is the other company that has been taking proactive measures in providing cold storage units.

Synopsis

Voltas and Blue Star have rallied 66 per cent each in the last six months while logistics companies have gained between 30 per cent and 90 per cent during this period.

Mumbai: The needle is helping move the needle in industries as diverse as cold chains, warehousing, and air freight companies. That is if you don't count the vaccine makers — and those in the race to make one.

As the world's biggest immunisation programme gets underway this Saturday, a raft of companies filling the complex value chain are set to benefit from the huge orders — and unalloyed investor attention through the course of the programme.

Among them are Blue Star, Voltas, Snowman, Blue Dart, Allcargo and Linde India.

“Voltas and Blue Star are likely to benefit from the opportunities in the cold storage of vaccines. As they are manufactures of commercial refrigeration, they will cater to this demand aggressively,” said Arafat Saiyed, analyst, Reliance Securities. “Companies have already kept the raw material ready for such cold rooms. Seeing the opportunity, they can double production.”

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A Shot in the Arm

Stock	LTP (₹)	Return (%)	
		3-M	6-M
Aegis Logistics	283.3	30.4	55.6
Allcargo Logistics	133.6	13.5	43.5
Blue Dart Express	3,970.0	30.4	100.0
Blue Star	786.9	24.0	68.0
Gati	93.9	81.9	101.3
Mahindra Logistics	441.3	36.4	41.3
Snowman Logistics	59.8	70.3	97.5
SpiceJet	91.3	93.3	89.2
Voltas	911.5	28.0	66.3
VRL Logistics	194.9	26.5	30.1

BY

ET Bureau

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Snowman Logistics, Blue Dart Express, Allcargo Logistics, and Mahindra Logistics among others have either tied up or initiated talks with the government, pharmaceutical companies, industry associations and supply chain partners to ensure seamless delivery and distribution of the vaccine under the Universal Immunisation Programme (UIP).

However, AK Prabhakar, head of research, IDBI Capital, said some of the pharmaceutical

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companies like Aurobindo, Cadila and Dr Reddy's Laboratories would be bigger long-term revenue beneficiaries once they launch the Covid vaccine, while distribution and logistics companies are unlikely to make huge money.

Blue Star last month said that the company has received a Rs 200-crore order for vaccine storage and more such orders are expected in the next few months.

Voltas is the other company that has been taking proactive measures in providing cold storage units.

Low-cost carrier SpiceJet announced that it will be giving logistical support for delivery of Covid-19 vaccine through its cargo arm, SpiceXpress. Snowman Logistics said that it already manages vaccine distribution of influenza/swine flu and that experience will come in handy while managing Covid-19 vaccine storage and distribution.

Snowman Logistics has reserved space for 70 million doses of the vaccine, across all its locations. Blue Dart constructed additional conditioning rooms for storing the vaccines at eight locations. Gati has a fleet of 120 trucks,

both primary and secondary, to cater to the cold chain logistics requirement for transport and delivery of the vaccine.

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