Confederation of Indian Industry

the UDAITI foundation

CII CENTRE FOR WOMEN LEADERSHIP

SheMoves Logistics

Driving Diversity and Inclusion in Logistics

April, 2025

ABOUT

The Udaiti Foundation

The Udaiti Foundation is committed to driving India's vision of a Viksit Bharat and a $30 trillion economy through two key objectives of increasing India's Female Labour Force Participation Rate to 50% and doubling the number of women-owned enterprises in the country. As a force multiplier in the Women's Economic Empowerment ecosystem, we actively provide data-backed evidence to the private sector organisations, state governments, and the start-up ecosystem and collaborate with them to drive change on the ground.

Close the Gender Gap Initiative

The private sector holds significant potential to enhance women's participation in the workforce. Close the Gender Gap (CGG) is an ambitious initiative to increase women's workforce participation in large enterprises in India from the current 18%.

Since the adoption of the Business Responsibility and Sustainability (BRSR) framework, there have been promising efforts to fill the gap in gender-disaggregated company-wise data. For instance, the reporting of gender data by NSE-listed companies has increased from 52% in FY 2022-23 to 57% in FY 2023-24. To this end, the Udaiti Foundation has launched the CGG Data Hub under the ambit of the CGG Initiative, a data-to-solutions platform for data, insights, tools, and resources on gender representation and policies in the formal sector. As a browsable web resource, the platform allows users to interact with the data and generate sector-wise, year-wise, and comparative reports through the Women's Formal Employment Tracker. CGG aims to catalyse commitments and action for gender parity at work.

To access the CGG Data Hub and learn more about it, please click here.

Confederation of Indian Industry and the Udaiti Foundation Partnership

The Udaiti Foundation and CII's Centre for Women Leadership have partnered to work with the logistics industry to address inclusion challenges. Through joint research, roundtables, and knowledge exchange, the partnership aims to foster greater gender diversity and promote inclusive practices within the sector.

ACKNOWLEDGEMENTS

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EXECUTIVE SUMMARY

The logistics sector is key to India's economy. It is valued at USD 215 billion, contributes 13–14% to the national GDP, and is projected to grow annually by 10.5%. The sector includes functions such as warehousing, transport, packaging, and supply chain management and employs over 3.2 lakh workers across roles and functions. Technological advancements, along with policy shifts such as the National Logistics Policy and GST implementation, have transformed the logistics industry. Yet, this growth has not translated into gender equity within the workforce.

Women represent only 7% of the workforce across 18 NSE-listed logistics companies (some of the largest in the sector) that report gender-disaggregated data. While jobs are expanding in the sector, women's inclusion is not keeping pace, with only a 1 percentage point increase over 3 years. A closer look reveals a promising trend where 78% of women are employed as workers and 22% are employees, with a majority in both categories holding permanent employment. Within the logistics sector, listed companies such as Bluedart, Delhivery, and Mahindra Logistics have emerged as exemplars, demonstrating how gender-inclusive practices can be effectively integrated into operational models. While the quantitative data presented draws primarily from these 18 listed companies, the qualitative findings in this report reflect insights from a broader set of logistics players.

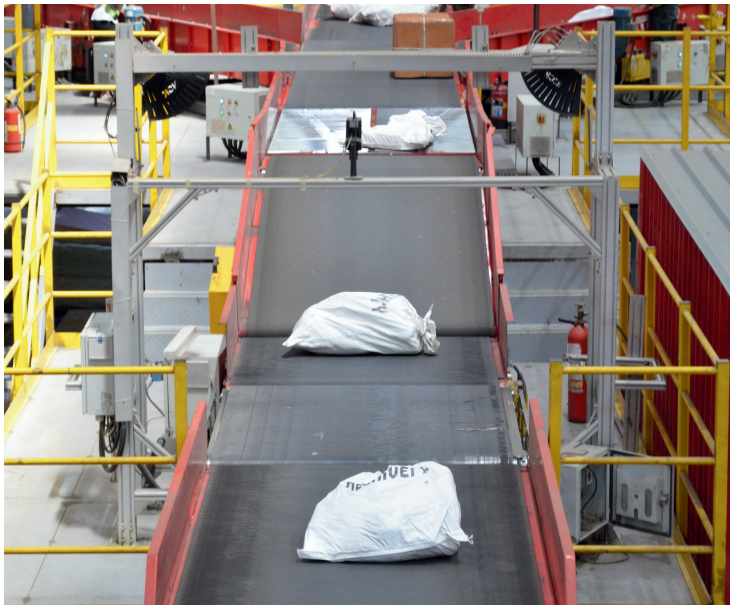
The findings of this report, which used a mixed methods approach for investigation, underscore that increased gender diversity can lead to higher productivity, cost efficiencies, innovation, and improved financial performance. Women have contributed significantly to measurable outcomes such as improved attendance, enhanced order processing quality, and operational savings of up to 12%.

However, multiple barriers continue to restrict women's entry and progression. These include entrenched gender biases, exclusion from informal networks, a lack of safe and gender-responsive workplace infrastructure, and restrictive labour regulations that limit women's working hours. Social norms and the burden of unpaid care work further constrain women's availability, particularly for roles that require mobility or night shifts. Regional disparities and peer acceptance within male-dominated teams also influence women's participation and retention.

To address these challenges, the report outlines targeted recommendations for government, industry, and civil society. Policy makers are urged to ensure state-level implementation of gender-responsive labour codes, invest in safe infrastructure, and offer incentives to companies adopting inclusive practices. Logistics companies must leverage digitisation and automation to remove physical barriers, implement robust safety protocols, and create pathways for recruitment, retention, and leadership development for women. Civil society organisations have a critical role in shifting mindsets, promoting mentorship, and enabling skill development and visibility for women in logistics.

SECTOR OVERVIEW

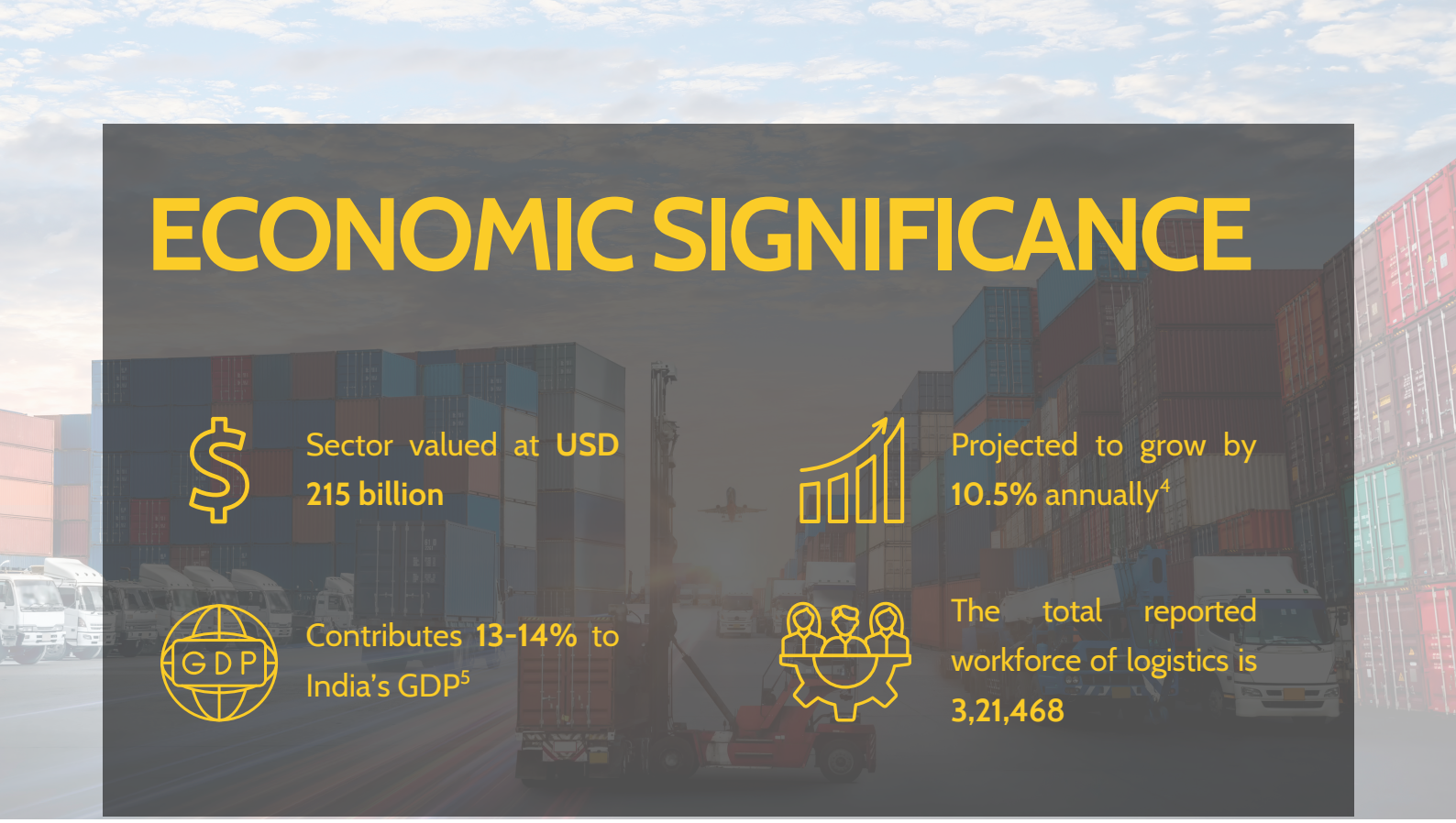
The logistics sector involves the transporting and storing of goods between points of production and consumption,[1] encompassing services such as packaging, warehousing, transportation, and supply chain management. These functions act as the backbone of physical commercial transactions*.[2] The logistics workforce operates across entry-level, middle-level, and top managerial roles, catering to diverse sub-segments such as transport, warehousing, and supply chain logistics.[4] Key sub-categorisations and job roles include:



Categorization	Scope	Key Job Roles
Warehouse operations	Refers to storage, inventory management, and preparation of goods for further distribution.	1. Packer 2. Sorter 3. Picker 4. Inventory Data entry operators 5. Manager
Dark store operations	Refers to storage and rapid fulfillment of online orders.	1. Picker 2. Putter 3. Manager
Last-mile & hyper local delivery operations	Refers to the final leg of e-commerce delivery, where parcel is delivered to end consumer.	1. Last-mile Delivery Agent 2. Route Planner 3. Delivery Fleet Coordinator 4. Driver
Transport Services	Refers to the movement of goods through road, rail, air, or sea.	1. Drivers 2. Conductors 3. Loaders 4. Fleet Manager 5. Coordinator 6. Planner
Supply Chain Logistics	Involves planning, executing, and monitoring the flow of goods.	1. Supply Chain Analyst 2. Procurement Manager 3. Manager

** While the National Logistics Policy (NLP) broadly defines the sector to include nodes and connections such as ports and stations, this report narrows its focus to companies providing these core logistics services. These areas hold the most potential for increased participation of women and are crucial for gender-intentionality efforts.*

ECONOMIC SIGNIFICANCE



The role of the logistics sector will become even more pronounced in the face of India's broader economic ambitions, including achieving a GDP of USD 5.5 trillion by 2027.[6] However, for this, it is critical to address the sector's transformation. Over the last few years, the logistics industry has evolved rapidly through technological advancements. Innovations such as Radio Frequency Identification (RFID), Global Positioning System (GPS), and digitisation have enhanced connectivity and operational efficiency and reduced costs. These technological advancements are complemented by Government of India (GOI) initiatives such as GST implementation and the National Logistics Policy (NLP) and the rising investments and mega infrastructure projects. The growth of e-commerce and international trade has further increased the demand for streamlined logistics solutions.[7]

GOI INITIATIVES FOR PROMOTION OF LOGISTICS SECTOR

2017 — Department of Commerce established to oversee integrated development of the sector[8]

2020 — The Occupational Safety, Health, and Working Conditions Code, 2020 supports women in logistics

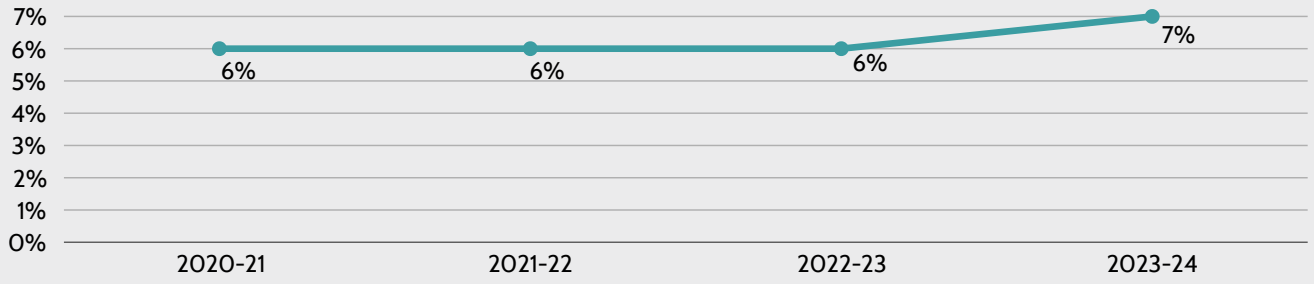
2021 — PM Gati Shakti focuses on multi-modal connectivity, infrastructure development, and economic zones

2022 — National Logistics Policy aims to reduce logistics costs, improve infrastructure, and integrate digital solutions.

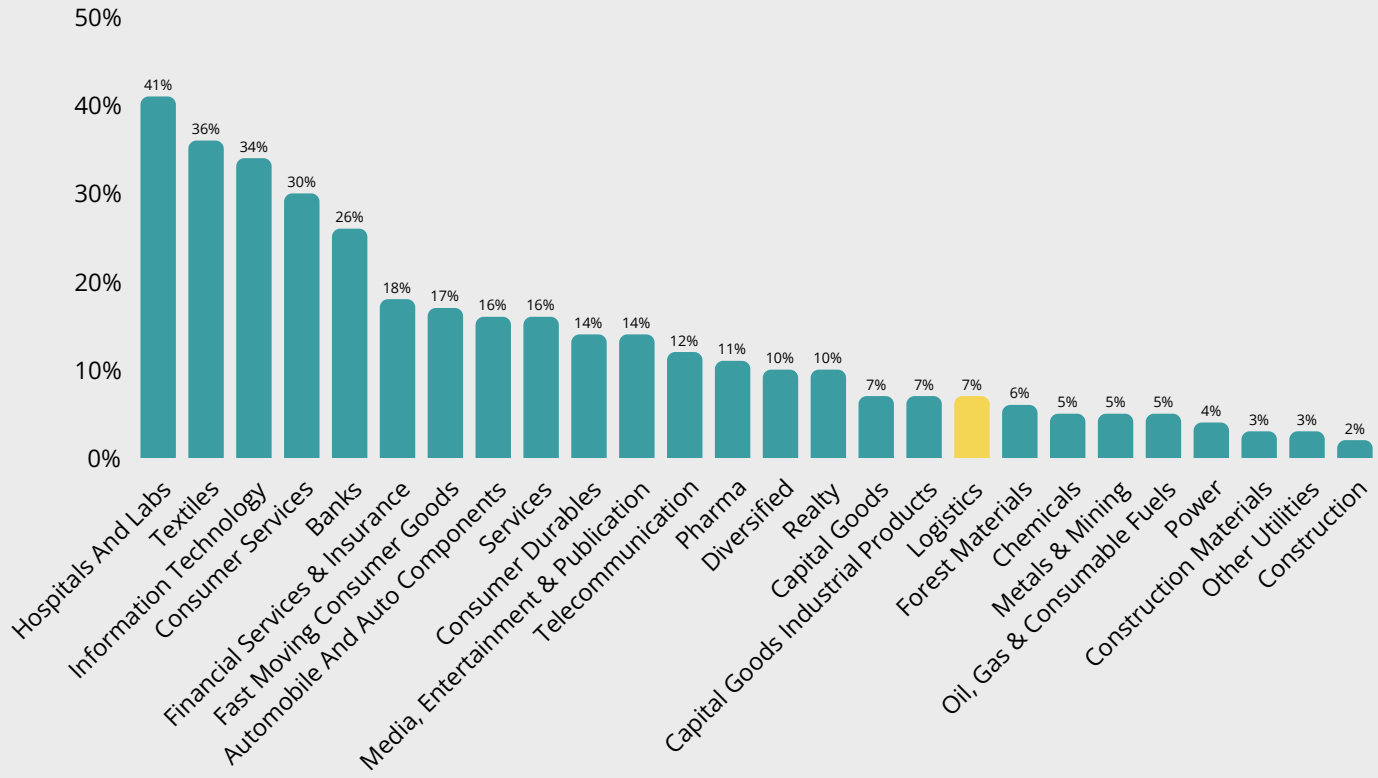
WOMEN IN LOGISTICS

Women comprise 7% of the total workforce in the 18 large logistics firms that are NSE-listed and have reported gender data. While the total logistics workforce has risen from FY 2020-21 to FY 2023-24, the share of women in logistics has seen an increase of only 1% point over the same period. This indicates that although more jobs are being added, women remain significantly underrepresented.*

Women's Workforce Representation in the Logistics Sector over Four Years (%)



Women's Workforce Representation (All Sectors) in FY 2023-24 (%)

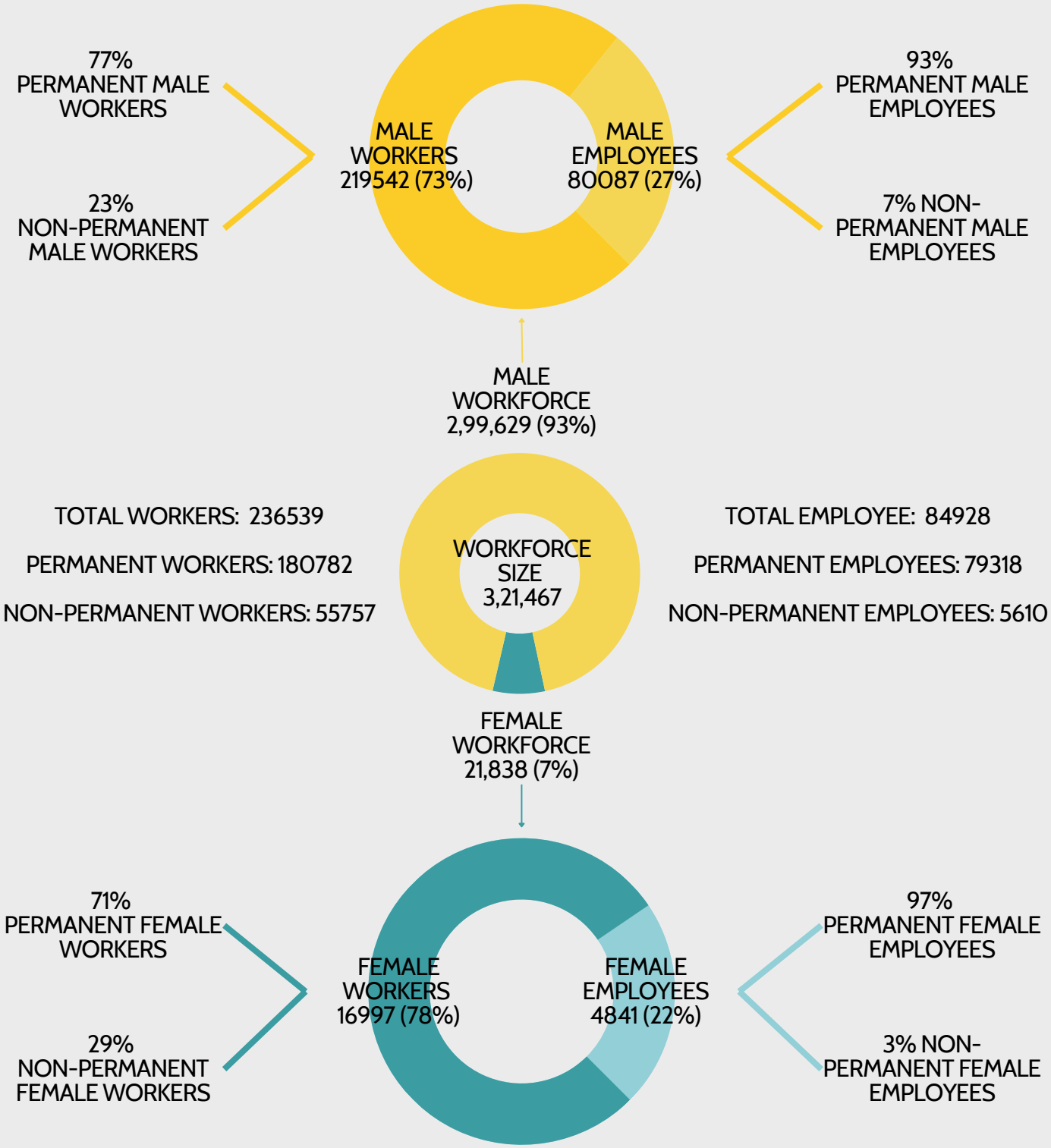


This 1% increase in women's representation in the sector is low in comparison to other sectors such as Pharma and Automobile, Auto Components, which have both seen an increase of 3 points over the same three-year period. This low growth, in a sector with historically poor numbers for women, has continued the trend of under-representation, keeping it well below the NSE average of 18%.

Note: The list of the 18 NSE-listed logistics companies is provided in Annexure C.

An analysis of women's representation across various employment types in the logistics sector reveals that 7% of the logistics workforce is female — 5.7% at the worker level and 7% at the employee level.* Of the total female representation, 22% are represented at the worker level, and 78% are employees. 97% of the 4841 female employees and 71% of the 16997 female workers are in permanent roles, which is a promising trend.

Women's Representation at Different Segments in the Logistics Sector



The data is only for the 18 logistics companies which have shared gender data

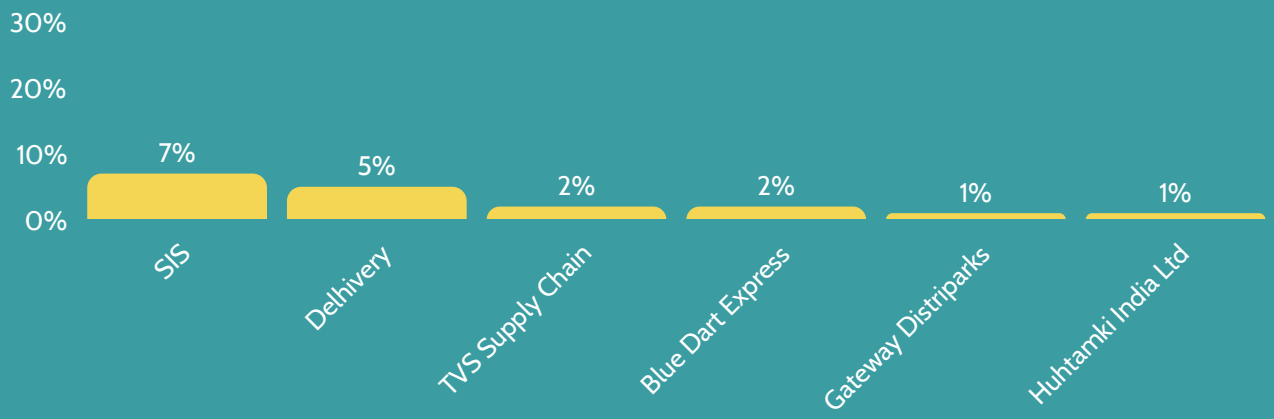
*Note: The distinction between 'workers' and 'employees' is detailed in Annexure D.

EXEMPLARS

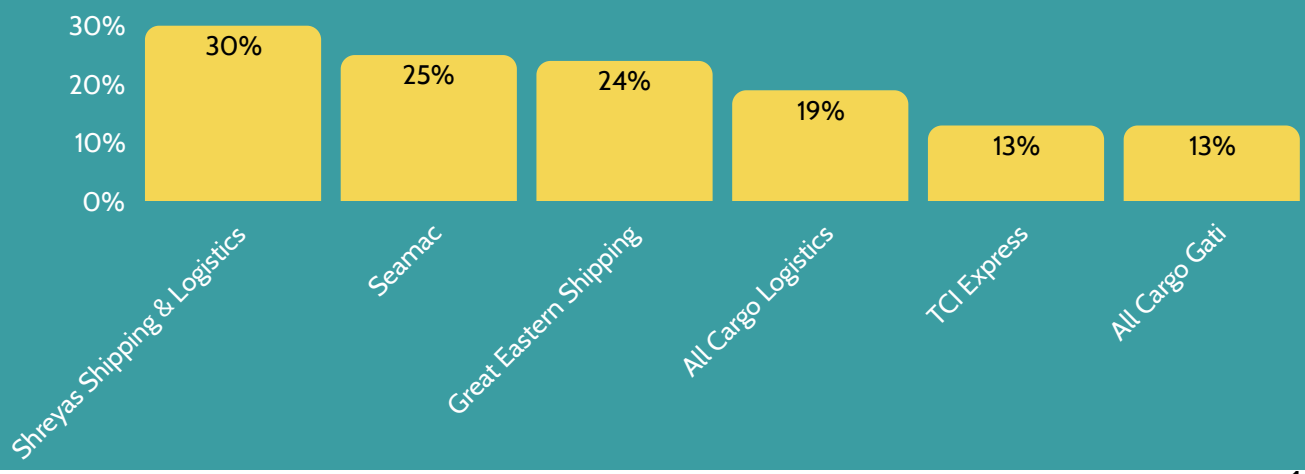
Companies with Highest Representation of Women (Overall, Permanent Employee, Permanent Worker)

Logistics Companies with Highest Overall Representation of Women (%)

Logistics Companies with Highest Women Permanent Worker Representation



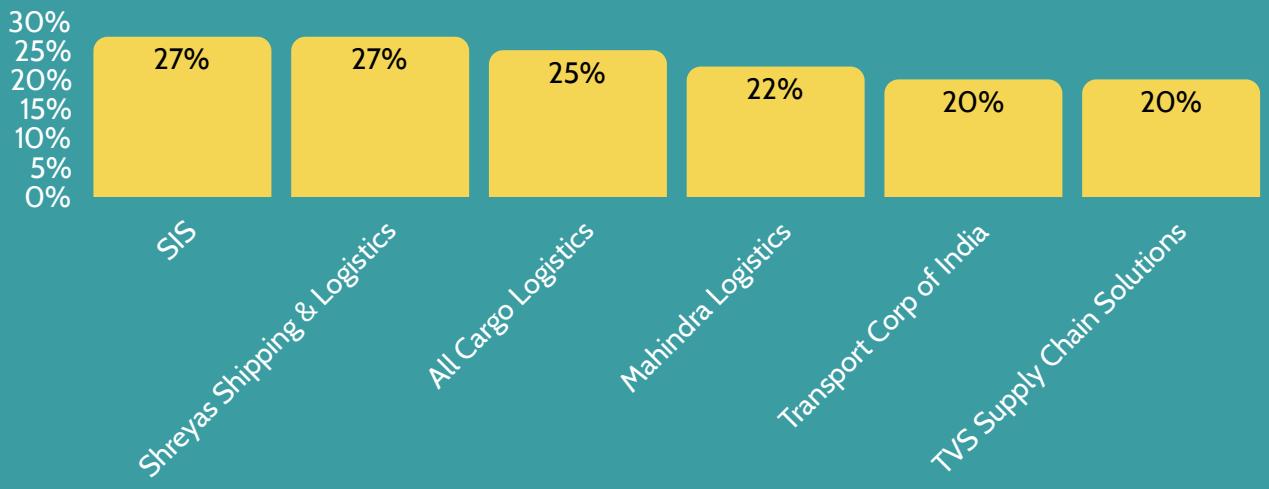
Logistics Companies with Highest Women Permanent Employee Representation



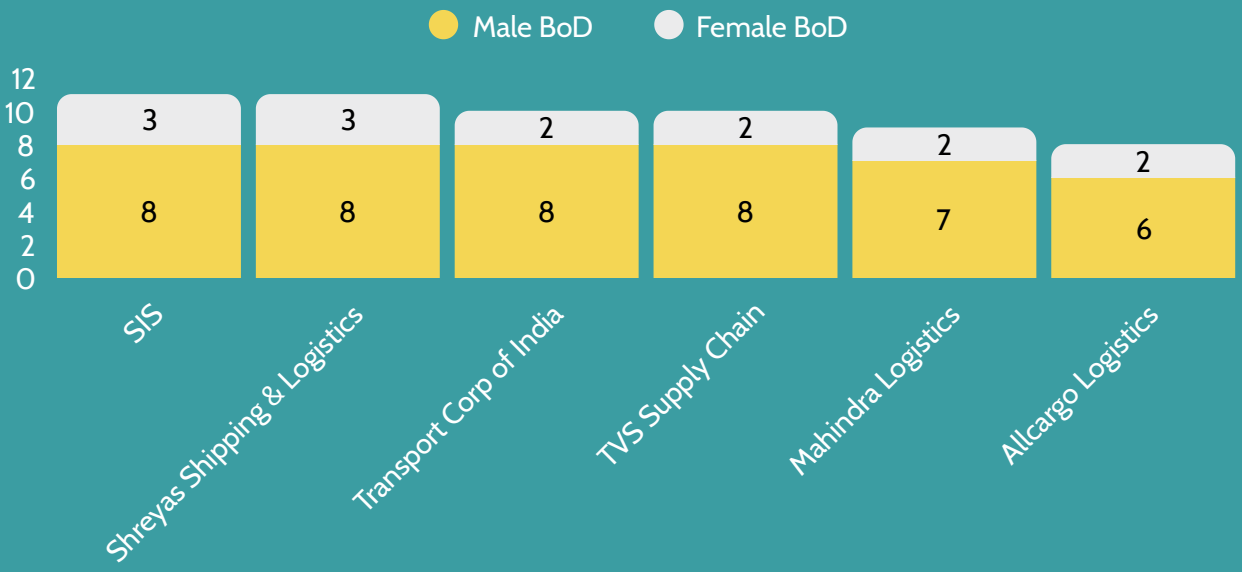
EXEMPLARS

Companies with Highest Representation of Women (Board of Directors and Key Management Positions)

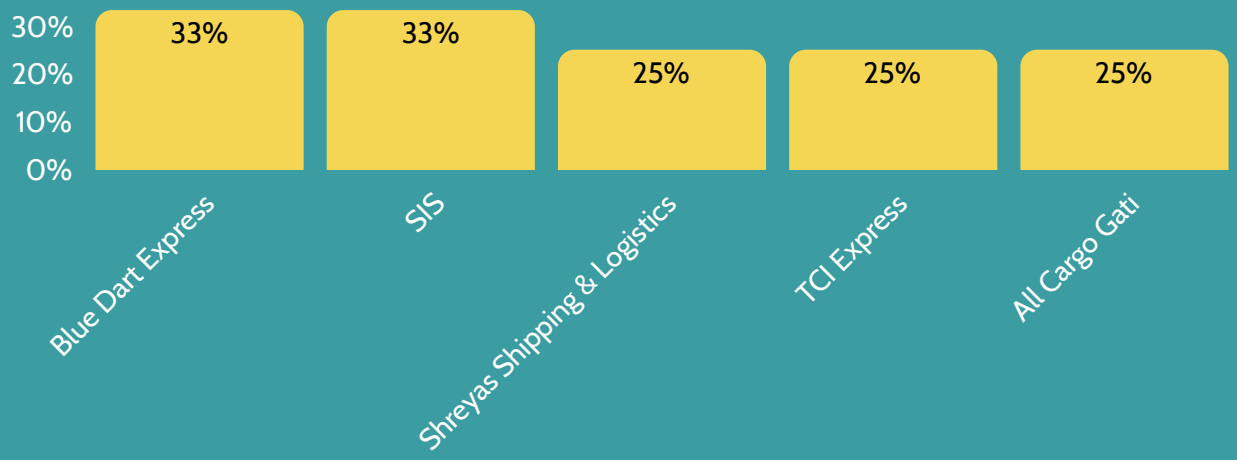
Logistics Companies with Highest Representation of Women in BoD (%)



Gender Breakdown of BoD: Absolute Numbers by Company



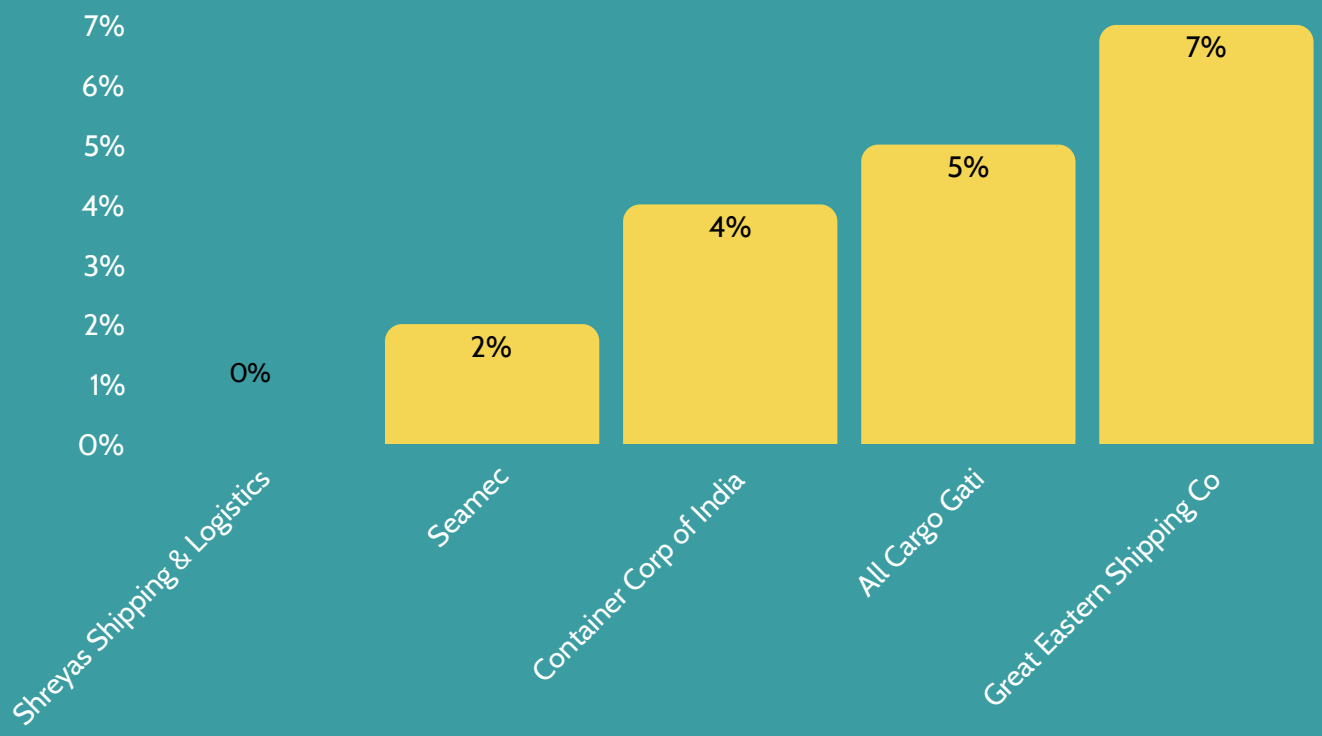
Logistics Companies with Highest Women Representation in KMP (%)



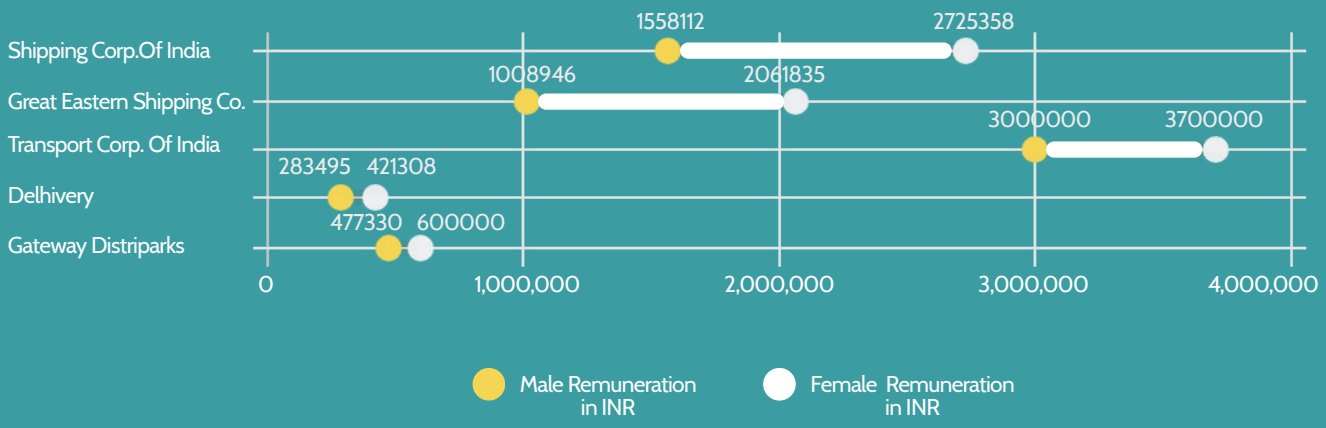
EXEMPLARS

Companies with Lowest Female Attrition Rates and Pay Gap

Logistics Companies with Lowest Attrition of Permanent Women Employees (%)



Logistics Companies where Women Employees (other than BoD & KMP) Earn More Than Men



EXEMPLARS

While the companies mentioned above are NSE-listed and have reported gender-disaggregated data—making them exemplars in India's logistics sector—for this report, we are focusing on three key companies: Blue Dart, Delhivery, and Mahindra Logistics. This selection is based on the availability of comprehensive insights from reports, ESG disclosures, and industry news. Due to limited publicly accessible information on the other companies, a deeper analysis of their gender diversity initiatives could not be conducted.

Established in 1983, Blue Dart Express Ltd. is an Indian logistics company. It is a subsidiary of DHL, specialising in express air and integrated transportation services across India and internationally. The company provides services such as package and cargo delivery, freight forwarding, warehousing, and supply chain solutions.

Female Representation	Female Employees Permanent	Female Employees Non Permanent	Female Workers Permanent	Female Workers Non Permanent
4%	674	0	201	0

Established in 2011, Delhivery Ltd. is an Indian logistics and supply chain company. The company provides supply chain solutions encompassing express parcel delivery, freight, and cross-border services. The company caters to diverse sectors including e-commerce, consumer durable, and automotive.

Female Representation	Female Employees Permanent	Female Employees Non Permanent	Female Workers Permanent	Female Workers Non Permanent
9%	1455	28	285	3854

Mahindra Logistics offers comprehensive supply chain management and enterprise mobility solutions. Operating over 500 locations nationwide and managing a fleet exceeding 15,000 trucks, the company specialises in warehousing, order fulfilment, and transportation services.

Female Representation	Female Employees Permanent	Female Employees Non Permanent	Female Workers Permanent	Female Workers Non Permanent
11%	420	7	0	0

INITIATIVES BY EXEMPLARS

Blue Dart is committed to diversity hiring, aiming for 25% women in management by 2025.
They have launched the 'Why Do We Love to Work for Blue Dart' portal on their career page to showcase experiences of women employees, providing insights into their success in various roles within the organization.

Delhivery is actively trying to gender diversify its workforce by conducting interviews for operational roles at the relevant facilities to create a comfortable environment for female candidates and provide them with a glimpse of their potential workplace. Delhivery also actively strives to include women on the hiring panels that interview female applicants.

Mahindra Logistics Limited has partnered with women e-bike riders for last-mile deliveries to promote gender equality in logistics. In the initial phase, 11 women riders are appointed in Mumbai, Bengaluru, and Nagpur. They receive comprehensive training for safe riding and delivery, and vehicles are equipped with GPS tracking for safety.

RATIONALE FOR WOMEN IN LOGISTICS

Before addressing the common challenges that contribute to women's under representation in the logistics industry, it is essential to examine the benefits of increasing women's participation in the logistics workforce.

ENHANCED OPERATIONAL EFFICIENCY

Research on the topic has found that women's inclusion in logistics roles, particularly in warehouses and dark stores, results in measurable improvements in productivity.[9] The presence of women in these roles helps improve work culture, reduces errors, and contributes to higher levels of engagement, directly impacting company bottom-line. A study by FSG[10] found that while managers in a warehousing and last-mile delivery company observed similar productivity levels between male and female employees during night shifts, female employees were observed to contribute to cost savings of up to 12% due to higher efficiency, better attendance, and improved order processing quality. The study further estimated that increasing women's representation in the warehouse workforce to 30% could reduce the average cost per worker by 3.6%, driven by their strong work ethic, quality of output, and higher retention rates. Research by Faes et al. (2010) also found that women in the logistics and supply chain sector consistently achieved better results by setting and meeting realistic yet ambitious goals.

"[Women are] Naturally more serious, more process-oriented, more driven, more passionate about whatever they do. So that's where we see... better productivity."

- Sayani Sarkar, Head, People Practices at Loadshare

DELHIVERY

Delhivery has observed that women workers are more productive at work, something managers attribute to traits such as higher integrity, discipline and empathy compared to male workers. Women also take fewer unplanned leaves. The number of women workers with 100% attendance is 8% higher than that of men.

FOSTERING INNOVATION & PROBLEM SOLVING

Innovation is a critical differentiator in the logistics industry, particularly in the face of challenges related to last-mile delivery, sustainability, and technology adoption. Research suggests that diverse teams are more likely to generate innovative solutions to complex problems. Studies by the London School of Business and the Center for Talent Innovation have found that gender-balanced teams foster the highest levels of innovation and market growth. By increasing female representation in logistics, companies can unlock fresh perspectives and creative solutions, leading to improvements in efficiency and customer experience. This is particularly important in a fast-evolving sector where technological advancements and new business models require constant adaptation.[11]

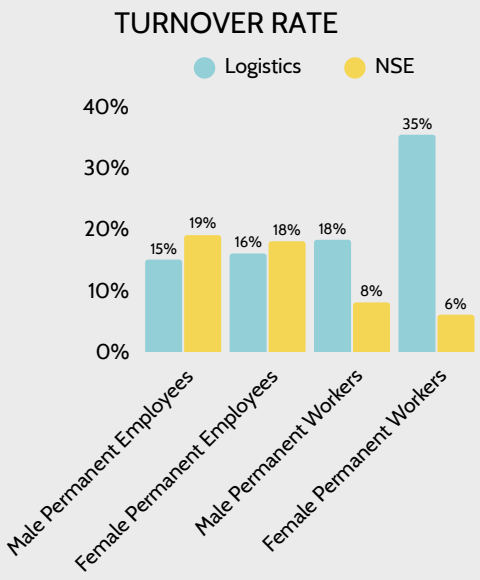
LOWER ATTRITION RATES

Studies and qualitative insights indicate that women in logistics have lower attrition rates than their male counterparts. This translates into substantial savings for companies, particularly in terms of reduced recruitment, training, and on boarding costs. For example, a study by logistics company, Ecom Express, found savings of INR 125 million over five years due to lower turnover rates among female employees. The stability offered by female workers reduces the financial strain that companies typically face when dealing with high turnover in logistics and supply chain roles.

> "[Hiring at] ...scale does come at a cost, but the ROI we are seeing is much higher. Attrition of women is 6 percent lower than that of men. Therefore, we don't need to invest in repeated hiring or training. If we are getting higher output with a woman staying longer, the initial cost of hiring is recovered. The absenteeism among women, especially in terms of unplanned leaves, is much lower than men."
> - Pankaj Kalass, Head of People Operations at Delhivery

According to CGG data, workers in the logistics sector have higher than average turnover rates. Female permanent workers have a high turnover rate of 35%. However, a study by Ecom Express found that women had a lower turnover rate which resulted in savings. Furthermore, observations shared by Delhivery also suggests that women in the logistics sector have lower attrition rates in comparison to men.

The disparity between CGG Data and the evidence (anecdotal and otherwise) from logistics companies may be due the fact that the evidence cited is specific to certain locations where the facilities provided to female workers are better than at other locations, thus reducing the turnover rates there.



BETTER FINANCIAL PERFORMANCE & HIGHER RETURNS

Research consistently links greater gender diversity in leadership to improved financial outcomes. A study by Catalyst found that companies with higher female representation in leadership achieve a 35% higher return on equity and a 34% higher return to shareholders compared to those with fewer women in leadership roles. In the logistics sector, where efficiency and adaptability are critical, diverse leadership teams enhance decision-making, drive innovation, and better align with customer needs, ultimately leading to stronger financial performance.[12] Companies that prioritise diverse leadership are twice as likely to meet or exceed financial targets, eight times more likely to improve overall business outcomes, and 35% more likely to outperform industry peers. These findings underscore the strategic advantage of fostering gender diversity in leadership within the logistics industry.

CHALLENGES

Data shows a minor increase in women's representation in the sector from 6% to 7% over the past year, but this remains significantly below the NSE average of 18% across industries, highlighting the need for substantial improvement. Despite the well-documented benefits of gender diversity, women in logistics continue to encounter barriers that limit their participation and career progression.

PERCEPTION AND BIASES

Unconscious biases, rooted in traditional gender roles, influence hiring and promotion decisions. Women are often perceived as less capable of performing physically demanding tasks, despite technological advancements that have reduced the physical demand of logistics work.[13] Stereotypes about women's ability to meet performance targets and handle operational challenges persist in the logistics industry.

These biases manifest in daily operational decisions, from task assignments to promotion considerations, creating artificial barriers that limit women's career progression and perpetuate their under representation in key roles, particularly in technical or operational positions.[14] The impact is particularly visible in specialised technical roles, where despite having requisite qualifications, women often face scepticism about their ability to handle equipment or manage operational complexities. This scepticism can lead to reduced opportunities for hands-on experience and skill development, creating a self-fulfilling cycle that reinforces existing biases.

The challenge extends beyond direct discrimination to include subtle forms of exclusion. For instance, in warehouse operations, supervisors might automatically assign physically demanding tasks to male workers without considering individual capabilities or available technology.[15] This practice not only reinforces stereotypes but also denies women valuable operational experience necessary for career advancement.

Mahindra LOGISTICS

Mahindra Logistics actively hires women in traditionally male-dominated roles, such as forklift operators. In their Chakan warehouse, five women successfully operate forklifts, encouraging further female hiring across its warehouses. The company has also hired female drivers for people transportation services in Kerala and Delhi, diversifying opportunities for women in logistics.

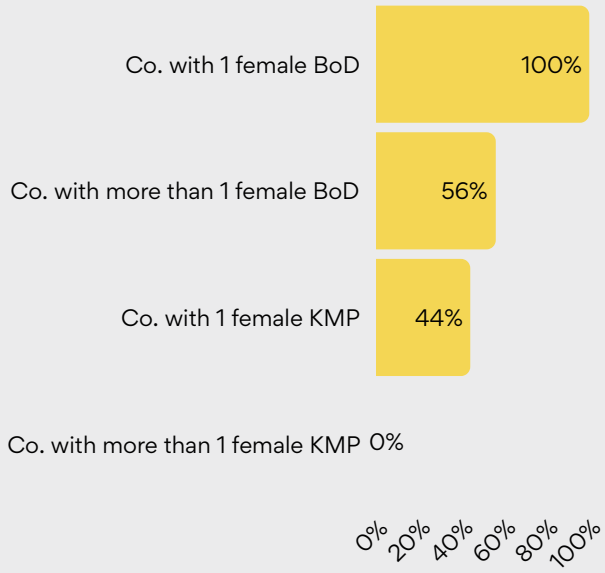
DELHIVERY

A major barrier to women joining logistics jobs is the perception that the work requires great physical strength and stamina. Delhivery tackled this by adopting technology to make the work less physically taxing for all workers.

At warehouses, many tasks are now automated using scanners, conveyors, and sorting systems while handling shipments. Investments have been made in forklifts and picking & sorting machines. Women are also being trained to operate Battery Operated Pallet Trucks.

EXCLUSION FROM NETWORKING & FEW ROLE MODELS

Informal networks are often male-dominated and exclude women which limits their access to industry insights, mentorship, and key career advancement opportunities. These networks are crucial for navigating organisational norms and obtaining support for promotions.[16] The absence of female role models in the logistics industry hinders women's career advancement, creating a cycle where fewer women in the sector have access to mentorship and professional networks.



This challenge is reflected in CGG data, which shows that while all 18 logistics companies have at least one female board member, only 56% have more than one. **This minimal representation is largely driven by the Companies Act of 2013, which mandates at least one woman on the board of publicly listed companies.** However, beyond this legal requirement, women's presence in board positions declines significantly. Additionally, only 44% of logistics companies have a woman in a key management role, and none have more than one, highlighting the industry's limited progress in promoting women beyond mandated quotas.

BLUE DART

Blue Dart has implemented comprehensive programs designed to create networking and mentorship opportunities. The company's Maritime SheEO Conference provides a platform for women professionals to connect and collaborate. Additionally, their Velocity and Aarambh management trainee programs offer structured opportunities for leadership interactions, mentorship, and cross-functional exposure.

Mahindra LOGISTICS

Mahindra Logistics invests in developing their senior critical talent and promoting women empowerment through 'Aadhya' - a training programme for female employees and associates' families, fostering mutual growth and tapping into the talent pool. Their best practices on people management are designed to support the personal and professional growth of our employees, which helps ensure that women are trained and skilled according to workplace norms thereby reducing any preconceived notions or biases about women's abilities.

DELHIVERY

Delhivery has mentorship programs that pair experienced employees with newer ones, providing guidance and support. Leadership training equips women with the skills necessary for advancement, while role rotations break down "glass walls" by allowing women to gain experience in diverse functions.

LACK OF WORKPLACE INFRASTRUCTURE AND SAFETY

Many warehouses and logistics operations lack secure and gender-responsive infrastructure, such as safe parking, hygienic restrooms, and secure waiting areas. These issues contribute to an unsafe and unwelcoming environment for women, particularly in operational roles. Oftentimes, basic necessities like separate restrooms for women are overlooked. A study by the International Labour Organization revealed that only 21% of factories in India have separate toilets for men and women.17 Even fewer offer amenities to manage menstrual hygiene. Safety concerns also cast long shadows, especially during late working hours, in addition to ingrained cultural norms that discourage women from working at night or in close proximity with unfamiliar men.

POSH & Sexual Harassment Complaints

37% increase in POSH related cases between FY 2022-23 and FY 2023-24

These trends underscore the urgent need for stronger preventive measures and stricter enforcement of POSH regulations, especially given the nature of logistics work, which often involves extended travel and late hours.

Limited Access to Daycare Facilities

22% of 18 logistics companies provide daycare facilities to their employees

Only 4 out of 18 logistics listed companies that report gender disaggregated data provide access to daycare facilities.

DELHIVERY

Delhivery has made significant infrastructural changes to address this, including separate washrooms for women, subsidised accommodation, and the presence of female HR executives in every shift. They also have in-house medical facilities staffed by female nurses.

To help women workers feel safe in the workplace, Delhivery has appointed female HR executives at all their Mega facilities. HR personnel are present during every shift to address any issues that may arise at the workplace and to ensure that Delhivery's code of conduct protocols are adhered to.

The Maternity Benefit (Amendment) Act, 2017

The amendment introduced key reforms to support and encourage women's continued participation in the workforce. It extended paid maternity leave from 12 to 26 weeks for women having their first or second child, allowing greater time for postnatal care.

The Act also mandates **crèche facilities in establishments** with 50 or more employees and allows mothers to visit the crèche four times a day. By making it compulsory for employers to inform women of these benefits at the time of hiring, the Act creates a more supportive and enabling work environment for women, particularly in sectors where long hours and physical presence have traditionally been a barrier.

UNFAVOURABLE POLICY AND REGULATIONS

The Occupational Safety, Health and Working Conditions Code, 2020

The Act was enacted to consolidate 13 existing central labour laws, streamlining the regulatory framework for occupational safety and working conditions across sectors. A significant shift under this Code which is relevant to improving women's workforce participation is the **inclusion of provisions that now permit women to work night shifts,** a move that amends previous restrictions under the erstwhile Factories Act, 1948. This central government's initiative has been followed by several state governments, who have begun implementing the necessary guidelines. However, it is now **imperative that more states align with the Code's progressive intent** and ensure safe and enabling environments that support women's participation across all shifts.

Several Indian states prohibit operational facilities from placing women on shifts that go beyond 8 pm. This creates a difficult policy environment for the logistics companies to navigate who have shifts which run throughout the day. The process of obtaining an exemption for allowing night shifts for women involves several complex and iterative steps designed to ensure compliance with local labour laws. Labour department officials review applications, which may involve assessing workplace conditions, engaging in discussions with the employer, and examining provided documentation. If approved, the employer receives an exemption certificate. However, in some cases, officials may raise objections, requiring rectification of identified anomalies before the process can be completed. This iterative process can be time-consuming and may involve multiple revisions and thereby discourage logistics companies from hiring more women.[18]

RESTRICTIVE SOCIO-CULTURAL NORMS

In many parts of India, societal and family expectations limit women's mobility and availability for roles that involve remote locations, late-night travel, or irregular or night working hours.[19] Since many roles in the logistics sector require mobility, flexibility and extended travel, women are often excluded from the logistics workforce.

DELHIVERY

Delhivery has developed strategies that specifically target women from economically disadvantaged backgrounds, creating opportunities that account for social constraints. The company offers accommodation at subsidised costs and provides skill development programs that include food and accommodation, removing barriers to entry. Delhivery also offers a fully funded residential Skill Development Program to overcome some of these limitations.

REGIONAL BARRIERS

Women's participation in the logistics sector may vary across regions due to cultural norms, local job ecosystems, and safety perceptions. Additionally, acceptability from male colleagues and peers continues to be a significant barrier that affects a woman's ability to participate in the logistics sector.

The regional disparity is reflected in Loadshare's workforce composition across various locations. Women's representation among workers varies significantly:

Visakhapatnam (Andhra Pradesh)	39%
Guwahati (Assam)	36%
Dibrugarh (Assam)	26%
Patna (Bihar)	14%

"One of the main challenges is the broader acceptance of women employees within teams—acceptability continues to be a significant barrier. We are sensitive about this when expanding to new locations. In the Northeast, where women form a large part of the workforce, it's much easier to find women candidates—whether for roles like warehouse in-charge for a large facility (7,000–10,000 sq. ft.) or a hub in-charge for a smaller last-mile center. It's a region where hiring women has been more feasible and executable for us."

- Sayani Sarkar, Head, People Practices at Loadshare

INADEQUATE PUBLIC WASH INFRASTRUCTURE

Extended time on the road, especially for delivery roles, makes access to clean, safe and publicly available restrooms a significant challenge. Women often find it difficult to maintain hygiene standards during long shifts, which can discourage them from pursuing these careers. This is particularly the case for women in field-based roles, who experience challenges due to the lack of policies, infrastructure, or workplace flexibility to accommodate menstrual needs. This lack of support discourages women from pursuing or continuing in these roles.[20]

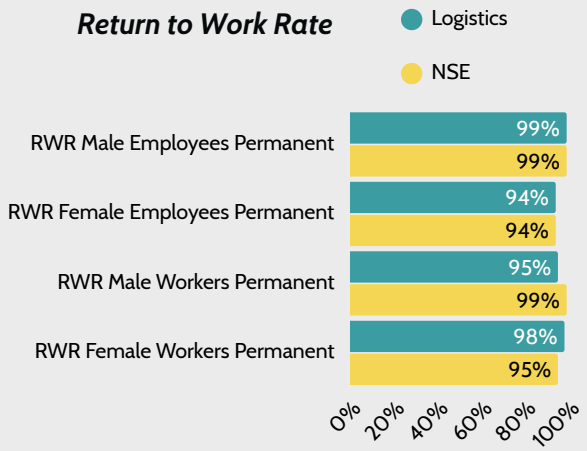
DELHIVERY

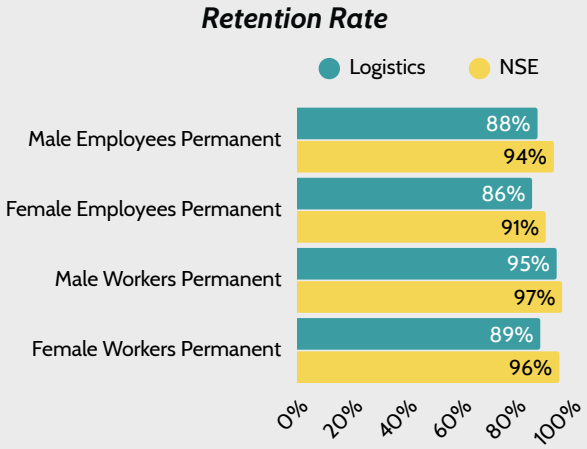
The company provides separate washrooms with privacy and hygiene amenities, ensuring basic dignity and comfort for women workers. They have also implemented medical support systems, including having a female nurse present across shifts and offering in-house medical facilities. Safe transportation further complements these infrastructure improvements, creating an environment that considers and addresses the specific needs of women workers.

Delhivery also helps their Under the Roof workforce (primarily migrants) find convenient and affordable residential facilities by offering its women workers accommodation at a subsidised cost with a minimal contribution from their side.

BURDEN OF UNPAID CARE WORK

Indian women disproportionately shoulder the burden of unpaid care work, including childcare, elder care, and household tasks. According to the Time Use Survey, 2024, women spend 140 minutes a day on care giving and 305 minutes on unpaid domestic work. This leaves them with limited time and flexibility to engage in paid work, particularly in industries like logistics, which often require long hours and a significant time commitment.[21]





While CGG data indicates that both female employees and workers in the logistics sector return to work after maternity leave at rates higher than the NSE average, their long-term retention remains a concern. In the logistics sector, only 86% of female employees are retained, compared to the NSE average of 91%. The retention rate for female workers is 89% which is 7% points below the NSE average.

BLUE DART

Blue Dart offers offer flexible timing options for women returning from maternity leave, extended maternity insurance coverage, and mandatory Privilege Leave to promote work-life balance. Bluedart also provides special leaves for children's board exams and medical situations acknowledge the complex caregiving responsibilities women often manage.

Mahindra LOGISTICS

Mahindra Logistics has a comprehensive New Parental Policy which reflects this commitment by empowering caregivers, regardless of gender, to select the care giving role that best suits their family dynamics. They offer a 6-month leave period, with the added flexibility of remote work options for up to 1 year to support a seamless return to work. Financial reimbursements for creche or nanny services are available to both primary and secondary caregivers of newborns.

The Udaan programme is tailored to empower women professionals who have taken a career break, encouraging their return to full-time employment. It is a thoughtfully crafted internship initiative that considers diverse aspects of workplace management. Women who've joined Mahindra Logistics through the Udaan programme have seamlessly integrated into various roles within the organisation and are actively being prepared for elevated responsibilities.

WOMEN IN THE GIG ECONOMY

Although this report focuses on the formal logistics workforce, it is important to recognise that a significant share of logistics workers, particularly those involved in last-mile delivery, are part of the gig economy (10 million gig workers). The flexibility offered by gig platforms has made them attractive to women, enabling them to manage paid work alongside care giving responsibilities by allowing control over work hours and reducing dependency on a fixed workspace. However, despite initial expectations that the gig economy would enhance women's workforce participation in India, data suggests only marginal improvements in overall participation rates. While more quantitative research is needed, early surveys indicate that although more women are entering gig work each year, they are also leaving at higher rates. Two unique challenges stand out:

ALGORITHMIC BIAS AND INEQUITIES

A challenge unique to women in the gig economy is algorithmic bias in platform-based work. Algorithmic management imposes rigid performance targets and restricts workers' ability to negotiate working conditions, disproportionately affecting women who have limited working hours due to care giving responsibilities. As a result, women gig workers—particularly in delivery roles—face significant wage disparities, earning 8–10% less than their male counterparts, according to a TeamLease survey. While gig work provides flexibility, biased algorithms can reinforce gendered labour patterns, reduce women's participation, and exacerbate the dual burden of paid and unpaid work. These challenges underscore the need for gender-sensitive algorithm design and stronger protections for women in the gig economy.

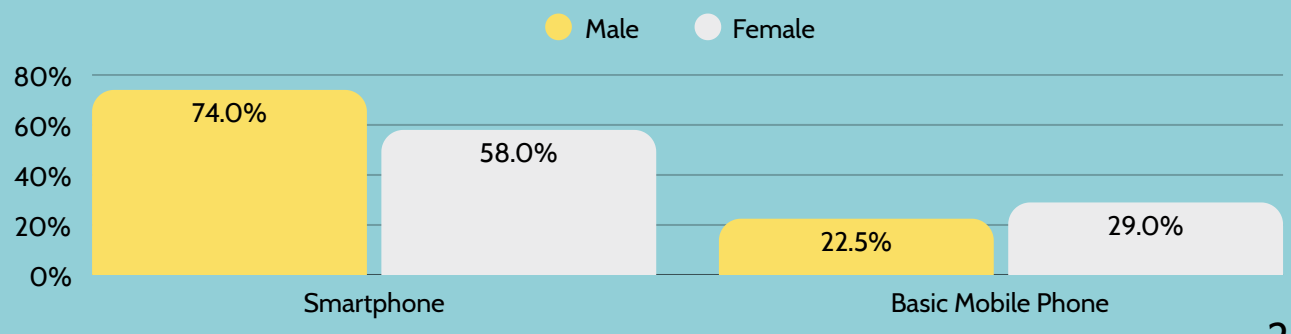
RESOURCE BARRIERS FOR WOMEN

Resource constraints significantly limit women's participation in the logistics sector, particularly in roles requiring mobility. Women gig workers often struggle to access personal vehicles and driving licenses, making it difficult to take up roles like delivery agents or long-haul drivers.[22]

Another resource barrier is the unequal access to digital technology. Only 53% of Indian women who can operate digital devices use mobile internet, as reported by CAMS 2022-2023. Predominant cultural norms and restrictions often prevent women from owning mobile devices.

These challenges are compounded by domestic responsibilities and limited access to credit and other productive assets, further narrowing women's opportunities in the sector.

Mobile Adoption (CAMS 2022-23)



RECOMMENDATIONS

Recommended Interventions for the Government

GENDER RESPONSIVE REGULATIONS

Governments should evaluate and amend regulations that hinder women's participation in the logistics sector. For instance, night shift policies continue to limit opportunities for women despite legal relaxations. The Occupational Safety, Health and Working Conditions Code 2021 allows women to work night shifts in all sectors with adequate protection. However, many state-level laws continue to restrict or discourage women's participation. This causes legal and reputation risks for employers. Female employees may encounter safety concerns, especially in states with varied local conditions. Additionally, businesses may prefer to hire male employees for both night and late-ending shifts to avoid the extra costs of compliance.

To address these challenges, Governments ensure uptake of the harmonisation of regulations while considering local safety conditions to ensure consistent and context specific protections. Additionally, adopting gender-neutral safety provisions can help prevent hiring biases that discourage women recruitment. Finally, reducing employer liability costs by leveraging public schemes for transportation, hygiene, and workplace security.

INFRASTRUCTURE DEVELOPMENT

The Government could consider establishing a dedicated gender-responsive infrastructure fund specifically for the logistics sector. This fund would support the development of essential facilities in warehouses, transportation hubs, and along major logistics corridors. The Government could also set up adequate WASH facilities across cities to enable more women to take on roles that require mobility.

INCENTIVES TO COMPANIES

Support to Companies: Governments should consider incentives such as tax benefits, grants or other forms of support for companies implementing gender-inclusive policies. This could encourage businesses to actively create safer and more equitable workplaces for women across the logistics sector.

Support for Women Entrepreneurs: Women entrepreneurs in the logistics sector could benefit from preferential access to government contracts, similar to federal contractor programs in other countries that reserve contracts for women or minority-owned businesses. A similar approach in India could help scale women-led enterprises.

COMPREHENSIVE SKILL DEVELOPMENT

Building upon the existing National Skill Development Policy, the Government should consider launching a program that provides fully funded national level skill development courses to women in logistics, similar to Delhivery's Skill Development Program. This initiative could include subsidised commercial driving license programs with an overall target to increase women's representation. Mobile training units should be deployed to reach rural areas, offering flexible

timing to accommodate women's domestic responsibilities. This program could establish partnerships with existing logistics companies to provide apprenticeship opportunities for women pursuing logistics roles.

STRONG GUIDELINES FOR SAFETY

The Government should consider strengthening the implementation of the Occupational Safety, Health, and Working Conditions Code, 2020 through specific guidelines for the logistics sector. These guidelines should address the 37% increase in POSH complaints observed in the sector by mandating regular safety audits of logistics facilities and quarterly reporting of gender-related metrics. The framework should ensure the establishment of grievance redressal mechanisms at all logistics hubs.

Recommended Interventions for Logistics Companies

SUPPORT FOR WORK - LIFE BALANCE

Logistics companies should implement structured work-life balance policies to enhance women's retention and career growth. Supervisors should be trained to recognise and address work-life challenges, mentor female employees, and enable flexible scheduling where feasible. Furthermore, to support care giving responsibilities, companies should extend parental leave beyond statutory requirements for both parents, provide childcare support through on-site facilities or local partnerships, and offer leave allowances for family emergencies and children's education needs.

ACCESS TO RESOURCES

Access to essential resources like two-wheelers and smartphones is crucial for mobility-focused roles in logistics, yet many women face barriers due to lower ownership of these assets. To bridge this gap, logistics companies can partner with financial institutions to offer affordable financing options, such as low-interest loans or lease-to-own models, for vehicles. Additionally, collaborations with technology firms can facilitate access to smartphones and data plans through employer-subsidised programs or bulk-purchase discounts.

SUPPORT DURING MENSTRUATION

Employers can introduce flexible leave policies, allowing women to take time off during their menstrual cycle without affecting their earnings. This approach supports women's health and well-being, ensuring they can continue to work without discomfort or stigma.[23]

IMPROVE SAFETY AT THE WORKPLACE

Logistics companies must create a safe and inclusive work environment for women by improving workplace infrastructure. This includes ensuring hygienic WASH facilities, well-lit and secure spaces, and access to daycare facilities. Companies should enforce compliance with the POSH Act through regular training and grievance mechanisms to prevent workplace harassment. Given that logistics work extends beyond warehouses to last-mile delivery, companies should collaborate with partners, such as restaurants and petrol stations, to provide women workers with safe and clean restrooms.[24] Additionally, they can work with the government to geo tag and rate public facilities, enabling mobile workers to locate the nearest safe and accessible options.

INCLUSIVE POLICIES

Organisations should develop policies that actively recruit and retain women, documenting successful initiatives to ensure sustainability. These policies should also aim to address gender-specific barriers and promote workplace inclusion. This should include mandatory gender sensitivity training for all employees and regular workshops on unconscious bias. Organisations should establish employee resource groups for women, celebrate women's achievements, and maintain regular feedback mechanisms to assess the culture changes.

Mahindra LOGISTICS

The company has an Employee Resource Group initiative, comprising 100 self-nominated members, constituting 19% of the total female headcount Mahindra.

CLEAR GENDER EQUALITY TARGETS

Organisations should set clear gender equality targets, ensuring the whole organisation is aligned with these goals. These targets should include percentage increase in women's representation, retention rates, promotion rates, pay equity and safety incident rates. These targets should be communicated transparently to foster an inclusive culture and should involve regular policy reviews and updates.

TECHNOLOGY ADOPTION

Logistics companies should embrace technology, automation, and robotics, which can remove barriers to entry for women and provide new job opportunities. Technological transformation can help narrow the gender wage gap and create more employment for women by overcoming the physical barriers which had earlier hindered women from participating in logistics roles, especially those located within warehouses.

PROFESSIONAL GROWTH

Companies should create structured pathways for women to advance to leadership roles. This includes providing necessary training, mentoring, and support for women to grow within the organisation and take on higher responsibilities. Such career growth and advancement pathways should include clear career ladders with defined skill requirements and timelines. Furthermore, companies can offer leadership development programs targeting women in middle management and regular skill enhancement workshops which would allow them to move to key management positions within the company.

SOCIAL TRANSFORMATION

CSOs are instrumental in catalysing change at the grassroots level. They develop and implement community awareness programs that challenge existing gender stereotypes, while providing comprehensive education about evolving gender norms in the workplace. Through targeted advocacy efforts, these organisations push for policy changes that support women's participation in logistics, while simultaneously building robust support networks that help women navigate industry challenges.

VISIBILITY AND MENTORSHIP

CSOs can adopt a multi-pronged strategy to enhance women's participation in logistics by promoting visibility, mentorship, and professional development. This includes documenting and disseminating success stories, running targeted media campaigns, and fostering a national network for women in logistics which can inspire women to work in logistics by reducing the common bias that logistics is not a place for women to work. Additionally, CSOs can establish mentorship programs, provide leadership training tailored to women's needs, and collaborate with educational institutions to encourage young women to pursue careers in logistics.

SKILL DEVELOPMENT

CSOs can offer targeted skill development support that addresses specific gaps in women's technical and professional capabilities, complemented by advisory services that provide guidance on career advancement, workplace challenges, and professional development opportunities. Through these interconnected efforts, CSOs can create a comprehensive support ecosystem that enables women to thrive in the logistics sector.

Azad Foundation

Women with Wheels programme aims to empower women by offering them non-traditional livelihood opportunities. Women undergo training to work as professional drivers, enabling them to achieve economic independence and challenge traditional gender norms. The programme includes driving lessons, Skill++ modules such as on gender, self-defence to combat gender-based violence, communication skills, English-speaking skills, and professional behaviours and etiquette. It supports women securing driving licenses and finding meaningful employment in the transportation sector. The programme has been successful in breaking stereotypes and promoting women's empowerment in a male-dominated industry.

CALL TO ACTION

Commitment to the cause is paramount in driving a positive change in women's representation within the logistics sector. Join the "Close the Gender Gap" Consortium to work with us, the Udaiti Foundation, to boost women's representation in the private sector.

Vision of the Consortium: Catalyze Corporate India into achieving much higher representation for women, both overall and at the leadership level.

Aim of the Consortium:

- **Spotlight Thought Leaders:** Showcase Consortium members as pioneers of gender equity, through leading media platforms and industry partnerships.
- **Amplify Best Practices:** Highlight outstanding strategies in gender-inclusive hiring, retention, leadership advancement, and return-to-work programs.
- **Facilitate High-Impact Engagements:** Host exclusive annual events, quarterly leadership forums, and strategic convenings for sector-wide collaboration.
- **Support Transformation Journeys:** Provide advisory and ecosystem-level support to help organisations drive gender transformation at scale.

Consortium Members Participate By:

- **Championing Women's Workforce Participation:** Leverage influence to drive industry-wide change, ensuring gender diversity remains a top priority in boardrooms, conferences, and sector-wide discussions.
- **Leading by Example:** Set, advance and achieve gender diversity goals within the organisation.
- **Sharing Data & Insights:** Commit to sharing gender-disaggregated data, best practices, and impact-driven initiatives.

What We Will Achieve Together:

- Increase gender data transparency & disclosure in the private sector.
- Drive greater accountability for gender-responsive policies & actions.
- Better representation of women in leadership and across all levels within private sector organisations.

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ANNEXURE A

METHODOLOGY

This report employs a mixed-methods approach, combining quantitative data analysis based on Close the Gender Gap data of 18 logistics companies with qualitative insights from key informant interviews with logistics industry leaders to provide a comprehensive understanding of women's participation in the logistics sector.

QUALITATIVE INTERVIEWS

- As part of Udaiti's private sector engagement work and for the purposes of this report, we have conducted in-depth key informant interviews with stakeholders in the logistics industry. Our interviews focused on workplace experiences in terms of hiring, retaining, and advancing women's workforce to gain a deeper understanding of the sector. These interviews were semi-structured and the questions were pertaining to challenges around hiring, retaining, and advancing women in the logistics sector.

  Individual names, company names, and any other identifying information were kept strictly confidential, and individuals are anonymised in this report. The interview inferences used in this report are broad emerging patterns of the sector which were reiterated repeatedly, and not standalone experiences to ensure credibility and generalisation.

CLOSE THE GENDER GAP

- The Close the Gender Gap (CGG) Data is sourced from Business Responsibility and Sustainability Reporting (BRSR) and Annual Reports (in case BRSR is not published) of 2209 NSE listed companies, for the 4 consecutive years - FY 2020-21, FY 2021-22, FY 2022-23 and FY 2023-24.

  Indicators such as Industry type, Market Index (Nifty 50 to Nifty 500), Employee Size, and Annual Turnover of the companies were additionally captured to conduct deep-dive analysis of the data to generate actionable insights. For the purpose of this report, the data is filtered for 18 logistics sector companies that have reported their gender data.

SECONDARY RESEARCH

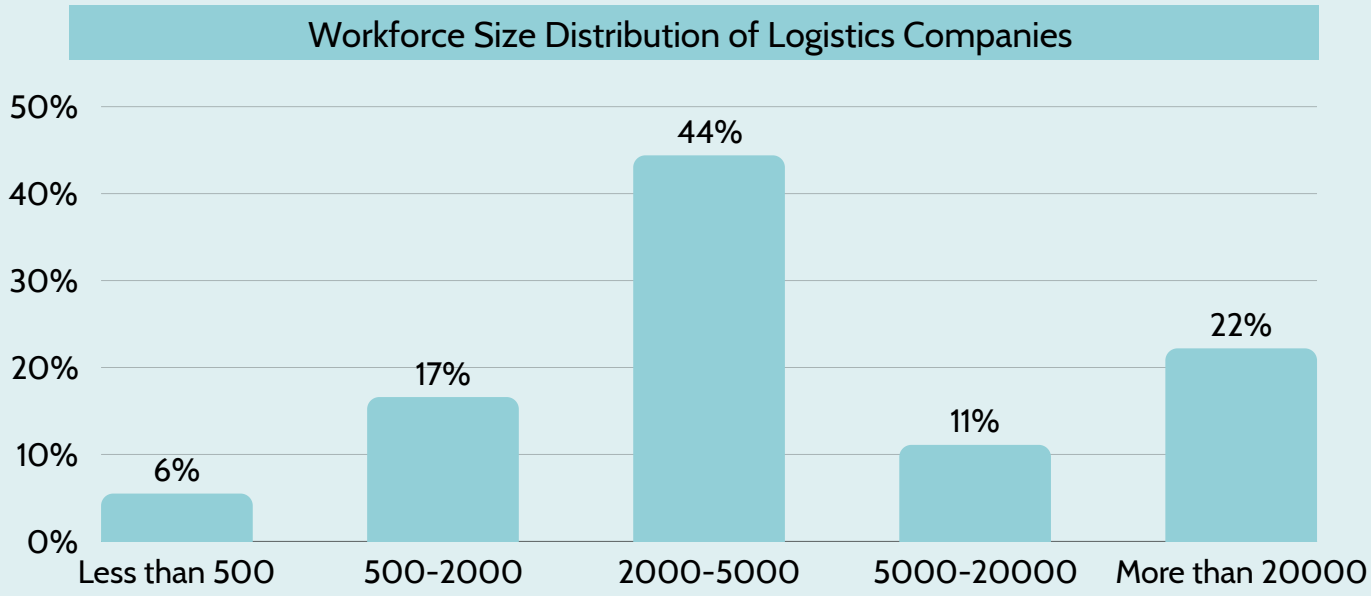
- A wide range of academic papers, sector reports, and news articles were referenced to gather valuable insights into the current state of women's representation in the logistics sector. These sources provided data and context on key challenges such as workplace safety, mobility, long working hours, and leadership representation. Publicly available material such as their annual reports, ESG Reports, and other articles and reports on logistics companies' diversity journey were reviewed.

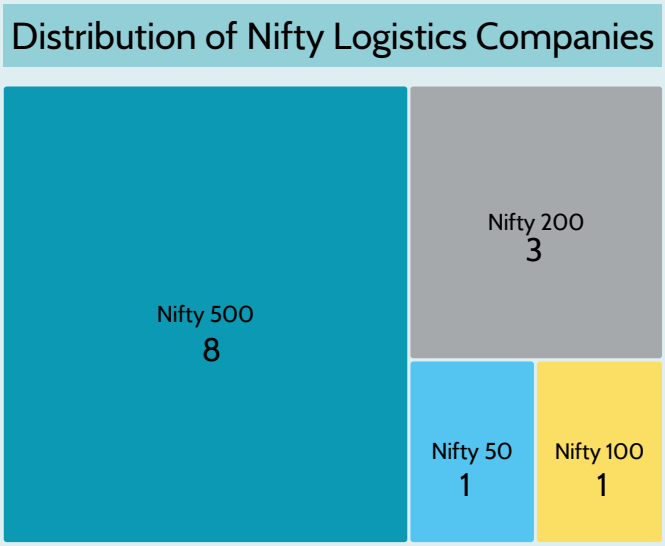
ANNEXURE B

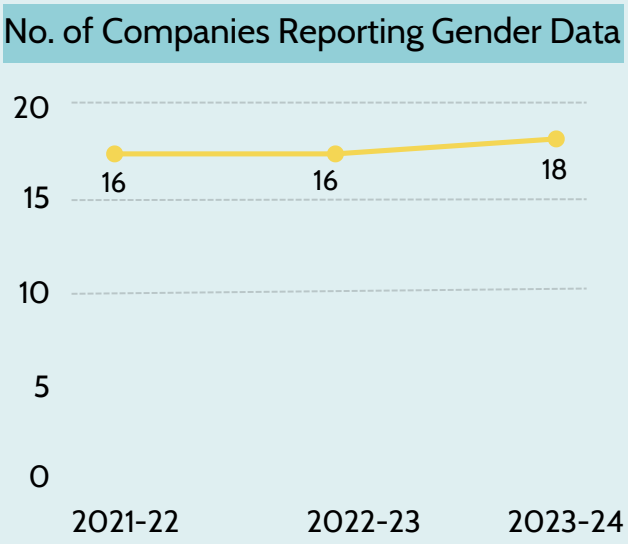
SAMPLE DESCRIPTION

18 companies reported gender data out of 43

3233 median company size







ANNEXURE C

LIST OF LOGISTICS COMPANIES IN THE SAMPLE

ADANI PORTS & SPECIAL ECONOMIC ZONE LTD.

ALLCARGO GATI LTD.

ALLCARGO LOGISTICS LTD.

BLUE DART EXPRESS LTD.

CONTAINER CORP.OF INDIA LTD.

DELHIVERY LTD.

GATEWAY DISTRIPARKS LTD.

GREAT EASTERN SHIPPING CO.LTD.,

HUHTAMAKI INDIA LTD.

LOADSHARE NETWORKS*

MAHINDRA LOGISTICS LTD.

SEAMEC LTD.

SHIPPING CORP.OF INDIA LTD.

SHREYAS SHIPPING & LOGISTICS LTD.

SIS LTD.

TCI EXPRESS LTD.

TRANSPORT CORP.OF INDIA LTD.

TVS SUPPLY CHAIN SOLUTIONS LTD.

VRL LOGISTICS LTD.

** While Loadshare Networks is not listed on the NSE, it has been included in this annexure as we conducted a primary interview with the company as part of our research for this report.*

ANNEXURE D

GLOSSARY OF TERMS

Employee: The term "Employee" means, any person (other than an apprentice engaged under the Apprentices Act, 1961), employed on wages by an establishment to do any skilled, semi- skilled or unskilled, manual, operational, supervisory, managerial, administrative, technical or clerical work for hire or reward, whether the terms of employment be express or implied, and also includes a person declared to be an employee by the appropriate Government, but does not include any member of the Armed Forces of the Union.

Worker: The term "Worker" means any person (except an apprentice as defined under clause (aa) of section 2 of the Apprentices Act, 1961) employed in any industry to do any manual, unskilled, skilled, technical, operational, clerical or supervisory work for hire or reward, whether the terms of employment be express or implied, and includes working journalists. Workers does not include anyone who is employed in a supervisory capacity drawing wages exceeding eighteen thousand rupees per month or an amount as may be notified by the Central Government from time to time.

Permanent Employee/Worker: The term "permanent employee or "permanent worker" refers to an employee or worker, employed for full-time or part time work, for an indeterminate period.

Other than Permanent Employee/ Worker: The term "other than permanent employee" or "other than permanent worker" refers to employees or workers who are employed for a fixed term that ends when a specific time period expires, or on completion of a specific task or an event such as the end of a project or return of a replaced employee. "Other than permanent" employees or workers could be employed directly by the entity or through third-party contractors.

Retention Rate: The Retention rate determines who returned to work after parental leave ended and were still employed 12 months later. It shall be calculated using the following formula: (Total number of employees retained 12 months after returning to work following a period of parental leave * 100)/ (Total number of employees returning from parental leave in the prior reporting period).

Turnover Rate: (The number of persons who have left the employment of the entity in the FY *100) / Average no. of persons employed in the category.

Attrition Rate: Attrition rate measures the percentage of employees who leave a company within a specific period, whether voluntarily or involuntarily, and are not replaced.

Return to Work Rate: The return-to-work rate measures the percentage of employees who return to work after taking a leave of absence (such as maternity or medical leave).

Key Management Positions: Key Management Positions include (i) the Chief Executive Officer or the managing director or the manager; (ii) the company secretary; (iii) the whole-time director; (iv) the Chief Financial Officer; and (v) such other officer as may be prescribed.

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