



INVEST INDIA
NATIONAL INVESTMENT PROMOTION
& FACILITATION AGENCY



Great Places for Manufacturing in India

World-class Destinations for Multinationals

Volume 1

May 2020

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Foreword

As businesses worldwide gear up for the “new normal” post COVID-19, India has been steadfastly and proactively cementing its position as a resilient economy with swift action-oriented decision-making. It has emerged as a forerunner for business continuity plans, with its inventory of low risk and asset light models like ready-built industrial infrastructure and build-to-suit offering higher capex savings, new tax incentives offering increased profitability, and a domestic market comprising 18% of world population.

A Stable and Predictable Business Environment

India's unprecedented rise in the World Bank's Ease of Doing Business Rankings 2020 to #63 (2019 - #77, 2014 - #142) is testament to its persistence, drive, and effort to become the world's business destination of choice. Unparalleled legislative and procedural reforms have been implemented in the last 5 years. This will only gather further pace in the coming months as both central and state governments gear up to stimulate the economy and improve their attractiveness for investments across sectors.

Most states have created single window mechanisms to grant permissions within stipulated time and have set service level agreements to grant permissions within 30 days, with provisions for deemed approval in cases of deviation. Information about industrial parks with plot-level details is being provided through GIS platforms. Dedicated relationship managers are being appointed to hand-hold investors through the entire project lifecycle.

India has one of the most attractive corporate income tax rates for manufacturing and services investments. A special window for manufacturing investments is open till 31 March 2023 with an attractive corporate income tax rate of 17.16%, lowest among BRICS. Government of India has signed 300 Advance Pricing Agreements with MNCs to give them assurance on tax structure.

India — The Engine for Global Manufacturing

Last five years accounted for over half of the FDI received by India since the liberalization era of early 90s, propelling India to top 3 greenfield FDI destinations. Interestingly, these investments came in diverse sectors ranging from highly sophisticated areas such as R&D centres and development centers for engineering, consumer internet, biotechnology, and pharmaceuticals to resource intensive industries such as food processing, chemicals & petrochemicals. India also attracted large scale investments in labor intensive manufacturing processes of electronics, textiles, and footwear industries.

Poised to become the world's third-largest consumer market within the next decade, India can safely be categorized as a growth engine for the foreseeable future.

About the Report and Invest India

As a part of its “Doing Business in India Guide” series, Invest India regularly collates information kits in response to various investor queries. These are across various elements of investor interest such as taxation, incorporation of business and business guidelines, government policies, visa guidelines, sector and state specific information packs etc.

Great Places for Manufacturing in India is the latest information kit, wherein facts, figures, and investor activity have been captured for various industrial ecosystems that exist in India. This is the first in the planned series, which shall be subsequently expanded to include other established and emerging industrial clusters of India. Thematic collations of clusters such as industrial hubs in coastal economic areas, hubs in north-eastern states and hubs for high-priority sectors are going to be included in future editions.

This series is an effort to provide deeper clarity and insights to investors on doing business in India, and address common investor queries on understanding various capabilities, players, and strengths of the Indian manufacturing landscape.

The report is organized into 3 sections. The first section gives a business, macro-economic and demographic overview of India. It also introduces the manufacturing ecosystem of India, highlighting investor facilitation mechanisms and pan-India location analyses for select high-priority sectors.

The second section is the compendium of the profiles of 10 established manufacturing powerhouses of India, with glimpses into their existing industrial ecosystem, prominent industrial parks and unique strengths. The third and final section acquaints the investor with the dual-tiered incentive structure and introduces key stakeholders in India's investment landscape.

As India propels ahead on its pro-reform and pro-investment journey, we welcome you to board the ship and be a part of its unparalleled and exciting growth story. Every tomorrow of India is better than today, and India is rolling out the red carpet to welcome investors to its shores.

Invest India will be your trusted partner at every step throughout your investment journey in India and shall ensure that every query is responded to by sectoral, functional and location experts.



Deepak Bagla

MD and CEO, Invest India

Preface

India is an emerging economy with a young population. The nation has witnessed a 257% growth in GDP between 2004-05 and 2018-19. As the 6th largest consumer market globally and with 49% workforce participation, India ranked amongst the top 10 recipients of overseas investments in 2019, attracting \$49 billion in inflows. This was a 16% increase from the previous year. Over the next decade, we see India becoming the global hub for manufacturing through its strong fundamentals lending well to continued growth.

Rooted in its traditional and spiritual ethos, India presents a unique ecosystem of massive size, diversity of resources and improved business-friendly policies. The dynamic market economy has risen 78 positions in the 'Ease of Doing Business' rankings since 2013. The nation also strives to balance rapid growth with its sustainable development ambition.

Destination of choice

India continues to make a mark on the world map as a manufacturing destination and is home to several major global manufacturers from diverse sectors. Certain geographic clusters have emerged as epicentres for industrial activity, which are highlighted by the underlying drivers.

In this report, we have covered suitable locations for industrial activity, based on sectoral requirements and preferences. This is done basis a comparative presentation of the incentives offered by an extensive repository of industrial locations and exploring the major industrial and industry enabling projects, both at the central and federal level. Detailed USPs of each of these industrial hotspots have been presented to help investors understand the benefits of each location, and leverage them while exploring options and opportunities to set up business in India.

COVID-19 and opportunities post-pandemic

The year 2020 presents challenges as uncertainty grips the world with the outbreak of COVID-19. While the world continues recovering gradually, industries world over are revisiting their global supply chain and reworking alternative business continuity plan. While there has been a growing emergence of Southeast Asian countries (especially MITIV) as the preferred choice, India has three distinct advantages in this regard:

- The recent reduction of corporate taxes for setting up of new industries (lowest among the MITIV countries)
- Host to Global In-house Centres (GICs) and Global Centre of Excellence (GCoEs) for several manufacturing companies that provide for more robust ecosystem and R&D
- The added attraction of a large domestic market along with prospects of a manufacturing export hub.

India at the pedestal of a new industrial growth

India stands at the pedestal of a new growth curve of rapid industrialisation, driven by technological prowess and inventive disruptions. It today hosts the world's third largest start-up ecosystem and a digital revolution that is powered and driven by government initiatives percolating to every level of the nation's growth story.

Through this report, we explore why **Make in India** is a great proposition. **What** is the India Advantage and **where** should you be in India to ride its growth story.

Happy reading!



Ramesh Nair

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We would like to acknowledge the expert opinion and feedback given by executives of various multi-national companies through their occupier testimonials that enrich the

report with insights on experience of operating out of the various industrial locations in India. Our special thanks to Hyosung Corporation, Hengli Corporation, Vivo Mobiles, Haier India, Foxconn International, BMW India, Mondelez International, Bharat Biotech, Novartis, Marico India, Colgate India, UNO Minda, Johnson Matthey, Rolls Royce India, GSK Pharmaceuticals and Ajanta Pharma for their testimonials.

We acknowledge the assistance of all the industry experts who shared their valuable insights on various aspects of the sector and manufacturing ecosystem, including private industrial developers and consulting agencies.



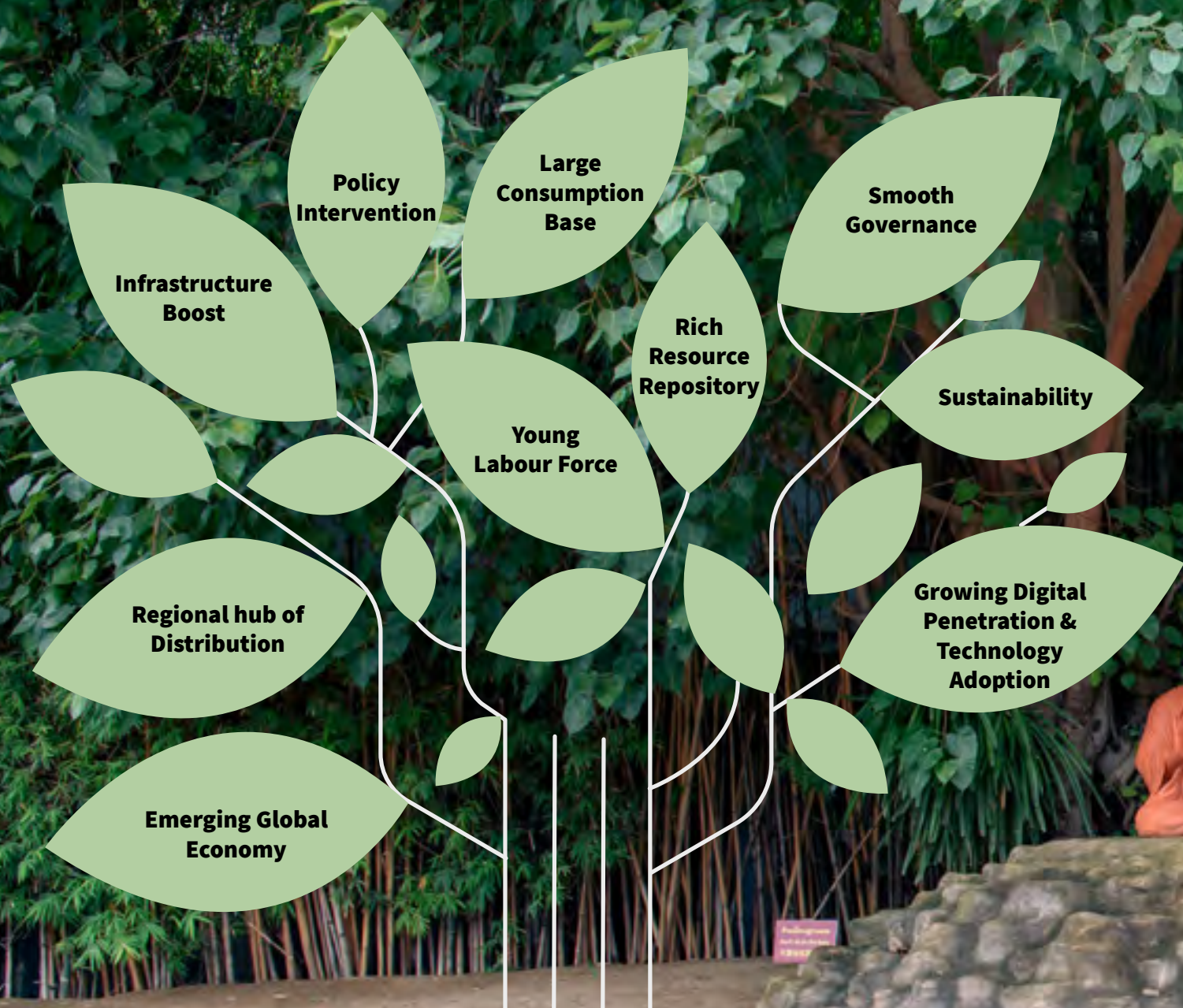
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Advantage India

Exploring the economic
opportunities in the land of the
Great Banyan Tree

Bandra-Worli Sea Link, Mumbai



The **Bodhi Tree** or **Bodhi Fig Tree**

(“tree of awakening”) is a large and ancient sacred fig tree (*Ficus religiosa*), located in Bodh Gaya, Bihar, India, under which Siddhartha Gautama, the spiritual teacher who became known as the **Buddha**, is said to have attained enlightenment or Bodhi.

1. EMERGING GLOBAL ECONOMY



Major **Growing Economy**



GDP of India has expanded by
2.57 times from 2004-05 to 2018-19



Ranks **43rd in Global Competitiveness**

Source: IMD World Competitiveness Rankings



Growing Large Economy:

India sustained its position as one of the fastest growing large economies in the world. India is expected to break into the world's largest 3 economies by the next decade.



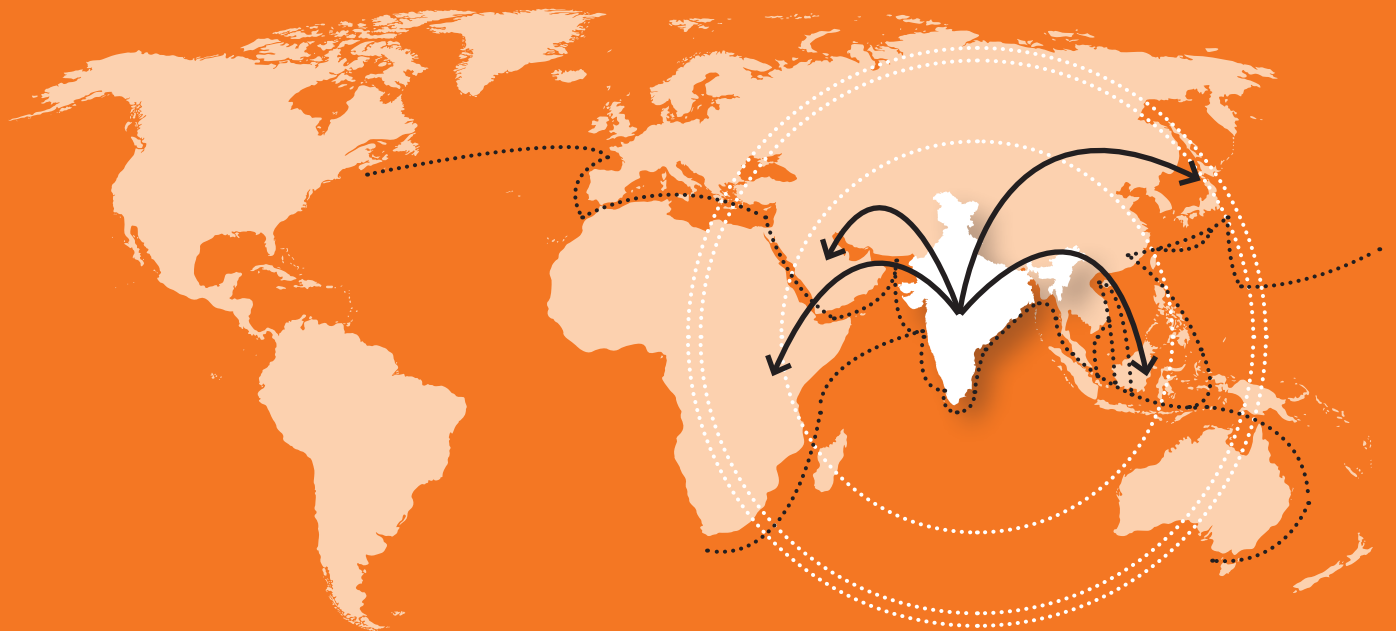
Robust Investment Performance:

PE – VC (Private Equity – Venture Capital) investments into India have touched an all-time high within the first 8 months of 2019 with USD 36.7 bn, thereby breaking the previous record of USD 35.8 bn received in the entire year of 2018.

2. REGIONAL HUB OF DISTRIBUTION



India is strategically located where it meets the emerging
**African Nations, the Middle East,
ASEAN countries and East Asian
economies** of China, Japan and South Korea



..... Indian Ocean Maritime Trade Route



Air Connectivity Advantage

Within 4 – 8 hrs flying radius of EMEA and Asia

Logistics & Maritime Advantage



Strategically Located at the Center of one of the most **Active Maritime Trade Routes**



Large coastline
of **7500+ kms**



200+ Major and
Minor **Ports**



Multiple Bilateral or Regional Trade Agreements in force with major economies of the world

 12 Hours Port Distribution

4 Cities
have **EXIM** potential

Ahmedabad

Mumbai

Chennai

Kolkata

3. LARGE CONSUMPTION BASE



World's **6th Largest Consumer Market**



31% Urban population



18% Share of Global Population
(India's population: 1.3 bn)

Source: World Bank



3rd Largest Consumer Market by 2030, behind US and China.
Consumption expected to quadruple to USD 6 tn by 2030.

Reaching the length and breadth of the country



Source: JLL Industrial Research on Network Analysis Tools

* 12 Hrs. of Transportation time considering existing road network of India with reasonable travel speed depending upon the type of road (higher achievable avg. speed (40 km/h) on NH and Expressways while lower avg. speed (30 km/h) on SH and other district roads).

4. INFRASTRUCTURE BOOST



USD 1.4 tn **Investment in Infrastructure** over the next 5 years



Infrastructure Investment
Equivalent to total GDP of Indonesia and Thailand combined (2018)



Reduce Logistic Cost
to 10% of GDP from 14% presently



Mumbai International Airport



World's 2nd Largest Network of Roads.

Aggressive pace of road construction at 30 kms a day of highways in FY 19.



Bharatmala Pariyojana – Pan-India umbrella programme for optimizing passenger and freight movement and bridging critical infrastructure gaps in roads;

34,800 kms under Phase I to be implemented till FY22.



Logistics Efficiency Enhancement Program (LEEP) – 35 Multi-Modal Logistics Parks being developed.



Industrial Corridors – Corridors for industrial activity with planned greenfield industrial investment nodes. First industrial corridor is under implementation (Delhi - Mumbai Industrial Corridor).



4th Largest Rail Network in the world by size and the largest by passenger traffic.



Dedicated Freight Corridor Project –

High speed and high capacity rail corridors dedicated for freight movement.

2 corridors are under construction, 3 have been announced and 1 is in planning stage.



Sagarmala Programme - Accelerate Port-Led Logistics and Infrastructure

through greenfield ports, modernizing existing ports, developing 14 Coastal Economic Zones and enhanced coastal connectivity via all modes of transport.

MEGA INFRASTRUCTURE PROJECTS



- Eastern Dedicated Freight Corridor
- Western Dedicated Freight Corridor
- North-South Dedicated Freight Corridor
- East-West Dedicated Freight Corridor
- East Coast Dedicated Freight Corridor
- Delhi Mumbai Industrial Corridor
- Chennai Bengaluru Industrial corridor
- Mumbai Bengaluru Economic Corridor
- Amritsar Delhi Kolkata Industrial Corridor
- East Coast Economic Corridor

- Major ports
- Major Nodes
- Metro Cities
- Other Major Cities

PORTS: Number of Port - 12 major + 205 minor
Cargo Handled - 699 million MT (Major port),
1,229 million MT (All port)

ROADWAYS: Length - 5,594 thousand km
National Highway 142 thousand km

RAILWAYS: Track Km - 123 thousand km
Cargo handled - 1,221 million MT

BHARATMALA: USD \$100 billion Programme
initiated in 2017







- 3,200 km Dedicated Freight Corridor (Western and Eastern) which was initiated around 2010 is partially in operation in 2019
- 6,776 km DFC is proposed in 2016 to connect East-West, North-South, East Coast and South-West part of the country

5. POLICY INTERVENTION



Competitive Corporate Tax Rate: 17.16%
(for new manufacturing units operational by 2023)

Dividend Distribution Tax abolished in 2020.

Parameter	 Malaysia	 India	 Thailand	 Indonesia	 Vietnam	 India's Rank in MITI-V
Corporate Tax for New Manufacturing Industries	24%	17.16%	20%	25%	20%	1
Ease of Protecting Minority Investors, Index	81.7	80	75	63.3	55	2
Budget Transparency, Open Budget Data Score	50	80.8	57.7	53.8	65.4	1
Ease of Getting Credit Index	75	80	70	70	75	1
Companies Embracing Disruptive Ideas*	69.9	59.5	50	55.1	44.7	2

Source: Global Innovation Index 2019, Insead and WIPO; Global Competitiveness Report 2018, WEF.

One Country One Tax through GST



Simplified and Consolidated Taxes: Goods & Services Tax (GST), is a single tax on the supply of goods and services, starting from the manufacturer to the consumer that reduced the administrative complications, and simplified the indirect tax system by removal of cascading taxes. **It has made India as a unified common market.**

6. SMOOTH GOVERNANCE

Improved EoDB:

India has improved its EoDB Ranking from **142** (in 2015) to **63** (in 2019). Ranks in which India improves significantly are:

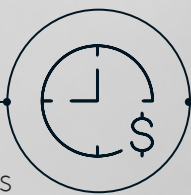
Starting Business: from **158** to **137**

Dealing with Construction Permit: from **184** to **27**

Getting Electricity: from **137** to **22**

Getting Credit: from **36** to **25**

Trading Across Border: from **126** to **80**



Reduced Time to Start Business:

For various procedural reforms, investor may save their implementation time in various stages, which inter alia includes:

Starting a business: **28.4** days to **18** days

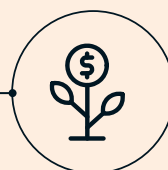
Procedure time to Start business: **158** days to **137** days

Time for obtaining construction permits: **185.9** days to **106** days

Time for Electricity connection: **105.7** days to **53** days

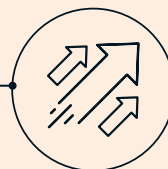
IEMs Implemented

USD \$105 Bn (Apr, 2015 – Oct, 2019) more than **doubled** from USD \$39 Bn (2010 – 2014)



Top 10 Improvers in EoDB Rankings:

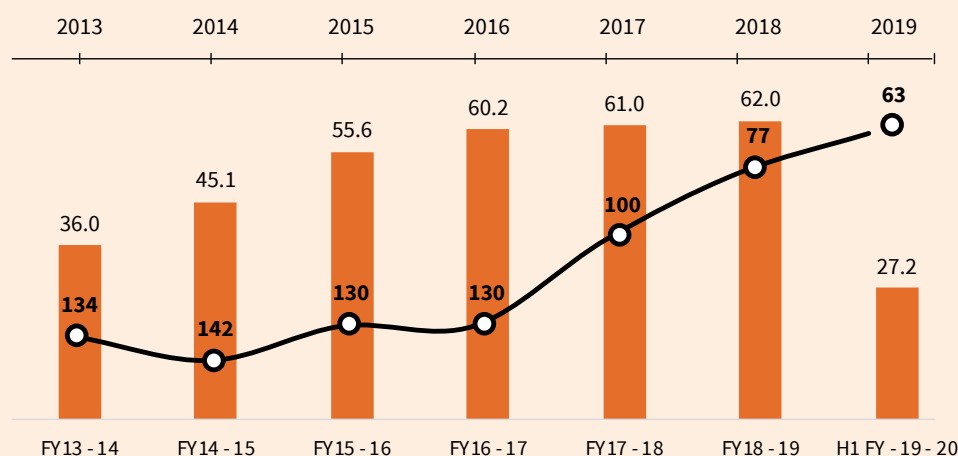
India is the only country in the world to rank among the top 10 improvers for the **third consecutive year**, as per the latest Ease of Doing Business rankings released in 2019



Improved Ease of Business & Growing Investment Inflows

Foreign Direct Investments India, 2013-19 (US\$ Bn)

More than half of all FDI has come in last 5 years



World Bank's
Doing Business
Rankings 2013-19

**79
Positions
Jump**

Improvements
Since 2014

https://dipp.gov.in/sites/default/files/FDI_Factsheet_4September2019.pdf

7. RICH RESOURCE REPOSITORY



Barring Petroleum (Crude and other products), India's raw material imports are significantly less, indicating a **Strong Indigenous Availability of Primary Raw Material** for manufacturing and **Lower Cost** incurred

Natural Resources:

Large reserve for iron ore, manganese, mica, bauxite, rare earth elements, titanium ore, chromite, natural gas, diamonds, petroleum, limestone, arable land.



Largest Copper reserves in the world



7th largest reserve of Manganese Ore



Largest reserves of Thorium



3rd largest reserves in the world of Iron Ore



4th largest reserves of Coal



4th largest reserves in the world of Zinc



5th largest reserves of Bauxite



Agricultural Resources:

India is a major producer of agricultural products and has huge opportunity in Food Processing sector.



Largest
producer of **Milk**



Largest
producer of **Fruits & Vegetables**



2nd largest producer
Pulses



25% of world's
Cotton production



8. YOUNG LABOUR FORCE



Skilled and available Labour

49.8 % Labour Force Participation Rate in 2018

Large young population & workforce

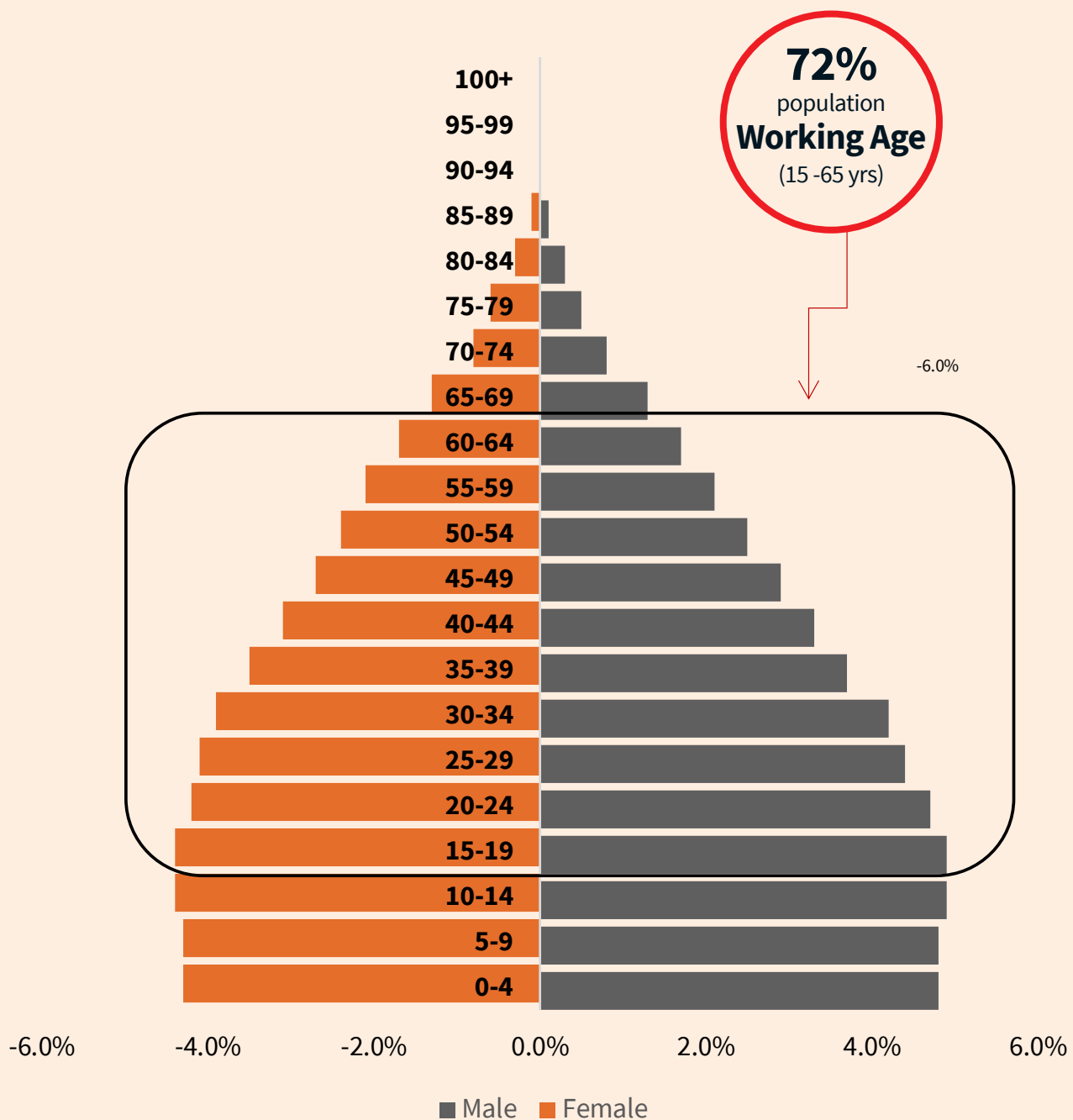
(85% of Population Below 55 years)



Highest Science and Engineering Graduates:

India boasts of one of the largest education systems in the world, comprising of approx. 8mn students enrolled in Science, Technology & Engineering

Massive Demographic Dividend



Young and Growing Workforce:

With a median age of 29 in 2020, India entered the **37-year Period of Demographic Dividend in 2018**. India's working-age population is anticipated to expand to almost **1/5th of the Global Labour Force** within the next 10 years.

9. GROWING DIGITAL PENETRATION & TECHNOLOGY ADOPTION

Over **600 million Internet Users** in India. 44x increase in data consumption during 2015-19.

India is home to **the world's 3rd Largest Startup Ecosystem**, having added over 1,300 tech startups in 2019.

Number of Indian **Unicorns** could increase to **95-105 by 2025***.

*Source: NASSCOM

Ready for Industry 4.0: The government has been propagating radical digitisation to impel economic inclusiveness and social transformation, through many initiatives like **Digital India, Make in India and Skill India**. India is now readying for an era of increased digitisation, heralding the advent of Industry 4.0, powered by new age technologies such the Internet of Things, Artificial Intelligence, and Robotics.



3rd Largest Tech Startup Hub; after US and China



Future R&D Powerhouse of the World:

Host to over 40% the world's Global In-house Centers (GICs) are located in India and is the 7th largest patent filing office in the world as per WIPO.

10. SUSTAINABILITY

India has pledged to climate change at the
Paris Agreement

33% to 35% below 2005 emissions
intensity of GDP by 2030

Renewable energy share, **40%**
of cumulative power generation by 2030

Shifting from conventional technology in auto
sector to **Electric Vehicles through**
FAME II Policy

Special impetus to
Renewable Energy



COVID-19 & OPPORTUNITIES POST-PANDEMIC

India - an alternative Business Continuity Plan destination

India stands at the pedestal of a new growth curve of rapid industrialisation. In the COVID-19 pandemic scenario, India has projected a more resilient and diversified economy to fight the crisis and projected as a major attractive destination.



As multinationals rethink their sourcing plans and re-organize supply chains, India is one of the most viable locations for Business Continuity Plans (BCP).

India, on account of its large domestic market and low cost production base, is well-positioned to host new investments in a range of sectors such as Textiles & Apparels, Electronics & Consumer Appliances, Pharmaceuticals, Medical Devices, Automobiles & Components, Capital Goods, Electrical Machinery, Footwear & Leather products, Chemicals & Petrochemicals, Food Processing, Plastic Products, Telecom Equipment, etc.

India's distinct advantages:

- The recent reduction of corporate taxes for setting up of new industries (lowest among the MITI-V countries)
- Host to Global In-house Centres (GICs) and Global Centre of Excellence (GCoEs) for several manufacturing companies that provide for more robust ecosystem and R&D[#]
- **GICs in India** now number **about 1,100**, employing more than **800,000 individuals** and generating approximately \$23 billion in revenue.^{##}
- Very large domestic market - as big as 18% of world population along with prospects of a manufacturing export hub to the rest on 82%.

NASSCOM Report
GIC REPORT 2018, Peepal

PLUG-N-PLAY RE-LOCATION FACILITIES

Indian industrial real estate market has undergone a remarkable transformation since 2017:

- Attracting USD \$10 billion of foreign capital and several professionally managed companies.
- New innovative models for accelerated market entry for foreign players with asset light and low risk options.

New Innovations — Low Risk and Asset Light Models

Ready Built Factories:

India currently has an **inventory of approx.**

22 mn Sq Ft* of ready built industrial space ready to be occupied in **6 to 8 weeks** (including rent-free fit-out period) in all major manufacturing clusters.

Institutional industrial built space by developers spread across country is well poised to cater to manufacturing needs apart from host of other regional players.

Key Institutional Industrial Developers

*AllCargo, Apeejay, Ascendas
Firstspace, Embassy Industrial Parks,
ESR, Hiranandani, Indospace, Jalan,
KSH, Logos, Mahindra World City,
Welspun One*

*Grade A & Grade B spaces in top 8 cities.: NCR Delhi, Ahmedabad, Kolkata, Mumbai, Pune, Hyderabad, Bengaluru & Chennai

High-end Specifications

- Pre-constructed / Ready infrastructure: Standard specifications include – Min. 13 metres height, Min. 6 tons per sq metres floor strength, Plinth height of 1.2 metres above ground, provision for mounting cranes, etc.
- Built-to-Suit: Plinth Ready and ground-up construction and delivery as per tenant requirements within 6 – 9 months

Higher CAPEX Savings

Rented factories for lease tenure of 9 years and above (Monthly rent payable) can reduce the spend on land and building significantly, thus reducing capital investment in the short term. This reduces pressure on parent entity to infuse large initial equity tranches in Indian subsidiaries. Conversion of CAPEX (land & building) to OPEX (rent) allows usage of several debt channels for financing India operations.



IndoSpace Industrial & Logistics Park, Oragadam

LOWER COST TO SERVE FOR GLOBAL CLIENTELE

Ultra-fast Approvals:

- Most state governments are offering all approvals to start factory establishments within 30 days. Ready built factories are already pre-approved for new investments.
- Non-polluting industries categorized as White Industries relaxed from several permissions.
- All states offer permissions through online platforms with proper tracking mechanisms.

Increased Profitability through Tax Incentives:

- Three-year special window to book lowest Corporate Tax of 17.16% for new manufacturing units operationalizing before 31 March 2023 among MITI-V countries.
- Attractive incentives to boost capital expenditure, increase production, employment creation and encourage exports.

- Exemption/Deferment of Customs Duties under several schemes such as Special Economic Zones and Bonded Manufacturing.

Fast Improving Business Environment:

- Indian is 7th largest country by area and 2nd largest by population. Only 4 countries in ASEAN are bigger than India's largest state in size.
- India has repealed over 1,000 regulations in the last 5 years to reduce compliance burden on investors.
- Large scale infrastructural investments directed towards intra-country connectivity and as industry enablers.
- Multitude of FTAs with several countries or group of countries.
- Only a handful country in the world offer a bigger canvas than India.



IndoSpace Logistics Park, Luhari

STRONG BASE OF MULTI-NATIONALS ACROSS INDIAN STATES

India: Destination of choice for several multi-national companies already

India is home to several large multi-national manufacturing companies and even hosts dedicated Investment Zones from companies from select countries creating a familiar ecosystem.

NOTE:

¹ Includes industrial area of Manesar – Neemrana – Bhiwadi & NIODA – Greater NOIDA

² Includes Vadodara

³ Includes Aurangabad

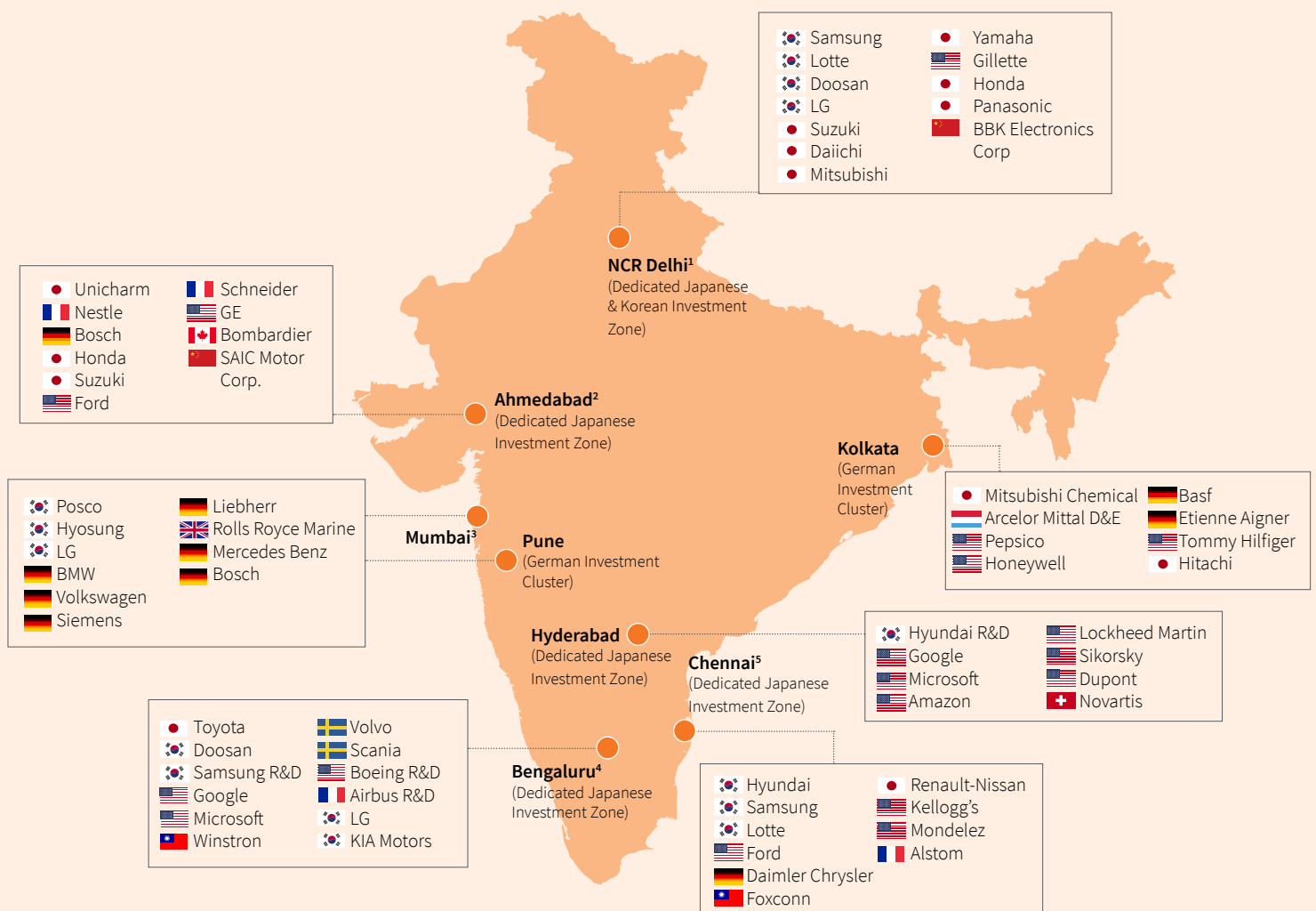
⁴ Includes Anantapur

⁵ Includes SriCity

⁶ Includes Kharagpur - Haldia

CANADA	LUXEMBOURG	UNITED KINGDOM
CHINA	SOUTH KOREA	UNITED STATES OF AMERICA
FRANCE	SWEDEN	
GERMANY	SWITZERLAND	
JAPAN	TAIWAN	

Manufacturing Companies by Country of Origin



Note: This is not an exhaustive list, but select key existing manufacturing units in the country.

Pan-India Location Analysis

Top established and emerging
destinations for manufacturing sectors



Qutub Minar, New Delhi



Certain sectors in India have emerged as **hotbeds for FDI** in the last few years. The manufacturing activity in these sectors is located not only across established traditional manufacturing hubs but is also spreading to some new and upcoming industrial areas, which are joining the list of manufacturing hotspots for the sector.

INDIA: THE EMERGING MANUFACTURING POWERHOUSE



Manufacturing Seedbed: India is among the top 10 countries with the highest industrial output



Continuous Pro-Investor Reforms: India has jumped 79 ranks in The World Bank's "Ease of Doing Business" rankings during the period 2015-2020

(2015: Rank 142, 2020: Rank 63)

TOP SECTORS BY FDI INFLOW

FY 2015-19

Sector	FDI USD \$ bn (% of total)	FDI Limits
Computer Hardware & Software	24.4 (12.06%)	100% under Automatic Route
Telecommunications	18.7 (9.22%)	49% under Automatic Route; Government route beyond 49%
Construction (Infrastructure)	12.2 (6.04%)	100% under Automatic Route for construction development and industrial parks
Automobile	11.6 (5.72%)	100% under Automatic Route
Chemicals (other than Fertilizers)	6.9 (3.42%)	100% under Automatic Route (except certain hazardous chemicals)
Power	5.4 (2.68%)	100% FDI under Automatic Route for generation from all sources (except atomic energy), transmission and distribution of electric energy and Power Trading 49% under Automatic Route in Power Exchanges
Hotel & Tourism	5.2 (2.59%)	100% under Automatic Route for tourism construction projects, including the development of hotels, resorts, and recreational facilities
Non-conventional Energy	4.8 (2.38%)	100% under Automatic Route for renewable energy generation and distribution projects
Electrical Equipment	4.7 (2.33%)	100% under Automatic Route for electrical machinery
Drugs & Pharmaceuticals	4.4 (2.17%)	100% under Automatic Route – Greenfield 74% under Automatic Route – Brownfield; Government Route beyond 74%

Excludes Services, Trading and Information and Broadcasting

Automatic Route: Under the Automatic Route, the foreign investor or the Indian company does not require any prior approval from the Reserve Bank or Government of India

Government Route: In this route, there is no investment without the prior approval of the Government of India.

OTHER NOTEWORTHY SECTORS



Electronics sector, a major driver of the Digital India Mission, is a thrust area of the Government, as India looks to substitute imports by domestic production and strengthen its share of global ESDM manufacturing. This is reflected in the growing FDI flows in the sector.

100% FDI under Automatic Route except Defence electronics (49% under Automatic Route; Government route beyond 49%)



Engineering and Capital Goods

Engineering exports comprise 36% of India's manufacturing-led exports and 25% of India's merchandise exports. The capital goods sector constitutes 12% of overall manufacturing in India.

100% FDI under Automatic Route for Capital Goods



PAN INDIA MANUFACTURING ZONES SNAPSHOT

India Map with all 44 industrial zones identified in the survey



CHEMICALS & PETROCHEMICALS



Market Size (FY18): USD \$ 165 bn

Expected to be \$304 bn by 2025 (CAGR: 9%)

Total Production (FY18): 47.882 MMT

(Alkali chemicals: 69%)

Policy Support:

PCPIRs: 4 all over India

Plastic Parks: 10 all over India

Central Institute of Plastics Engineering & Technology (CIPET):
36 all over India; 5 more upcoming

Region, State	PCPIR?**	Major Occupiers	Port / Dry Port Connectivity	Remarks
Dahej, Gujarat	Yes. Most successful PCPIR project	ONGC Petro additions Limited (OPaL)	Gujarat Maritime Board Old Port* Marine Shipbuilding Park* Captive Jetties Reliance Liquid Fuel Jetty* Birla Copper Bulk Cargo Jetty* Private Ports Adani Port* GCPTCL Liquid Chemical Terminal*LNG Petronet's LNG port*	Strategic Position: Within DMIC influence zone, as its situated within 50 kms of the DFC Well established hub: RIL, OPaL, ONGC, GACL, Petronet LNG, BASF, ABG, Adani, Welspun, Godrej & Boyce, GAIL, GSPC, Pidilite, Grasim, NOCIL, China Steel among others Deep Sea Discharge Facilities available
Patalgang, -Rasayani (Maharashtra)	No	Patalganga Manufacturing Division (PMD) of Reliance Industries Ltd. (RIL)	Mumbai Port (major port)* NPT (major port)*	Established Hub for sectors including chemicals, petrochemicals, pharmaceuticals and textiles, among others. Presence of players such as Cipla, Petronas, Castrol, Bombay Dyeing, Alkyl Amines, Balaji Formalin etc.
Cuddalore, Tamil Nadu	Yes (PCPIR identified), but established chemicals cluster outside PCPIR	Chennai Petroleum Corporation Ltd. (CPCL) refineries at Chennai and Nagapattinam	Chennai Port (major port) Ennore Port (major port) Kattupalli Port Cuddalore Port*	Presence of players such as Tanfac Industries, Asian Paints, Bayer MaterialScience, Chemplast in Cuddalore, and players such as Saint Gobain, Asahi in Sriperumbudur near Chennai.
Vizag-Kakinada, Andhra Pradesh	Yes	Hindustan Petroleum Corporation Ltd. (HPCL) led consortium with Total, Oil India, Saudi Aramco and Gas Authority of India Ltd. (GAIL); existing Visakha Refinery (undergoing expansion)	Vishakhapatnam Port (major port)* Gangavaram Port* Kakinada Port* Krishnapatnam Port; GMR is developing a greenfield captive port at Kakinada	AP PCPIR covers 6 existing SEZs Deep Sea Discharge Facilities available Situated off Krishna-Godavri basin , a rich reservoir oil and gas reserves.
Paradip, Odisha	Yes	Indian Oil Corporation Ltd. (IOCL)	Paradip Port (major port)* Dhamra Port	Exclusive Plastics Park at Paradip Gopalpur industrial area & SEZ in vicinity.



SECTOR SNAPSHOT



9.9% Share of exports
(excl. pharma) 2018-19



7.99% Share of
manufacturing GVA 2017-18



3rd Largest consumer of
polymers in world



3rd Largest producer of
chemicals in Asia by volume;
6th in world

**PCPIR or Petroleum, Chemicals and Petrochemicals Investment Regions is a specifically delineated investment region with an area of minimum 250 sq. km. planned for the establishment of manufacturing facilities for domestic

and export led production, along with associated services and infrastructure. Each PCPIR would have a refinery/petrochemical feedstock company as an anchor tenant.



Established



Emerging

*within 100 kms

AUTOMOBILE & AUTOMOBILE COMPONENTS

Market Size (FY19):



26.27 mn vehicles sold; 30.92 mn produced
Automobile Mission Plan 2016-26: USD \$ 300 bn
industry by 2026 (world's 3rd largest by volume)

Policy Support: To make India an EV Hub

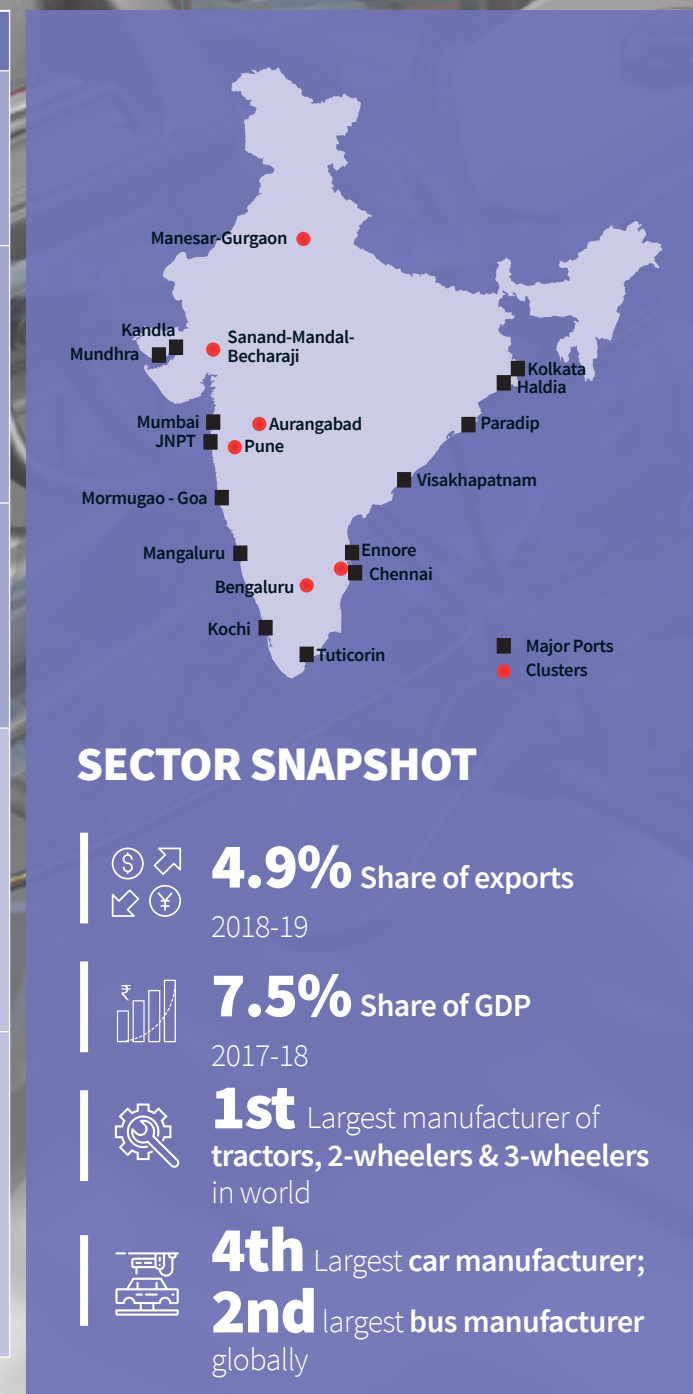
FAME (Faster Adoption and Manufacture of
(Hybrid and) Electric Vehicles) Scheme
National Electric Mobility Mission Plan 2020

Region, State	Major Occupiers	Port / Dry Port Connectivity	Highway Connectivity	Remarks
Pune-Aurangabad, Maharashtra	Fiat, GM, Volkswagen, Mercedes-Benz, Tata Motors, Bajaj Auto, JLR, Mahindra & Mahindra, Skoda Auto, Goodyear Tyres, Balkrishna Tyres, Duro Valves, Force Motors, JCB, Sany, John Deere, Continental, Minda, Carraro	Mumbai Port (major port); JNPT (major port) ICD Dighi*	NH48 (Delhi-Chennai) NH65 (Pune-Machlipatnam) Proposed Samruddhi Corridor	Maharashtra accounts for ~35% of India's output of automobiles by value.
Chennai-Sriperumbudur-Oragadam, Tamil Nadu and SriCity, Andhra Pradesh	Hyundai Motor, Schwing Stetter, Daimler Commercial Vehicles, Renault-Nissan, Yamaha Motors, Bharat Benz, Eicher, Ashok Leyland, BMW, Royal Enfield, Isuzu, Komatsu, Ford, TAFE, CEAT Tyres	Chennai Port (major port)* Ennore Port (major port)* Kattupalli Port* Krishnapatnam Port	NH48 (Delhi-Chennai) NH32 (Chennai-Nagapattinam) NH16 (Kolkata-Chennai)	Part of Chennai and surrounding areas, which are popularly nicknamed "Detroit of India" , due to the large presence of auto industry.
Manesar-Faridabad-Gurugram, Haryana	Maruti Suzuki, Honda Motorcycle and Scooter, Suzuki Powertrain, Suzuki Motorcycle, Hero Motors, Mitsubishi Electric Automotive, Harley Davidson, Yamaha Motors, JCB, Escorts Tractors, Minda	ICD Gurugram (Garhi-Harsaru)* ICD Faridabad (ACTL)* ICD Rewari* ICD Patli* ICD Ballabgarh*	NH48 (Delhi-Chennai) KMP Expressway	Home to the first and largest plant of India's largest automobile manufacturer – Maruti Suzuki.
Sanand-Mandal-Becharaji, Gujarat	Tata Motors, Ford Motors, Suzuki Motors, Honda Motorcycle and Scooter	Kandla Port (major port) Mundra Port Hazira Port ICD Sanand (Thar Dry Port)* ICD Khodiyar*	Connected through SH to NH8-A (Mandvi-Ahmedabad in Gujarat)	~102 sq. kms. of MBSIR (Mandal Becharaji Special Investment Region) being developed as an industrial hub, including a Japanese zone.
Bengaluru-Bidadi, Karnataka and Hosur, Tamil Nadu	Toyota Kirloskar, Mahindra Reva Electric, TVS Motors, Ashok Leyland, Continental	Chennai Port (major port) Ennore Port (major port) New Mangalore port (major port) ICD Whitefield* ICD Hosur*	NH48 (Delhi-Chennai) NH44 (Srinagar-Kanyakumari) NH948 (Coimbatore-Bengaluru) NH648 (Dobbaspeth, Karnataka to Hosur, Tamil Nadu)	Karnataka is the first state in India to roll out an Electric Vehicle and Energy Storage policy. It is also the R&D hub of India with 400+ R&D institutes.

Pithampur, near Indore, Madhya Pradesh is an auto cluster with the presence of players such as VE (Volvo-Eicher) Commercial Vehicles, Man Trucks, Mahindra 2-wheelers, Force Motors, Bridgestone Tyres, Caparo India, Liugong, Pinnacle Auto, JBM etc.

KIA Motors established its first factory in India at **Anantapur – Gudipalli, Andhra Pradesh** in 2019. KIA Motor's supplier base is also establishing its base in the vicinity.

Haridwar – Pantnagar, Uttarakhand is home to world's largest integrated 2-wheeler plant by Hero Motocorp. Tata Motors, Ashok Leyland, Bajaj and Mahindra are other notable players.



Established Emerging *within 100 kms

DRUGS & PHARMACEUTICALS



Market Size (FY18): USD \$ 36.7 bn

Expected to be \$55 bn by 2020
20% share of global supply volume of generic medicines

Policy Support:

Cluster Development Programme:
6 pharma parks in the pipeline

Region, State	Major Occupiers	Port / Dry Port Connectivity	Highway Connectivity	Airport Connectivity	Remarks
Hyderabad-Medak, Telangana	Novartis, GSK, Alembic, Biological E, Du Pont, Aurobindo Pharma, Ashland, Insud Pharma (Chemo), Mylan, TCI, Laurus Labs, Adama, Dr. Reddy's Laboratories, USP, Bharat Biotech, Piramal	Vishakhapatnam Port (major port); Gangavaram Port; Kakinada Port; Krishnapatnam Port ICD Sanathnagar* CFS Kukatpally*	NH44 (Srinagar-Kanyakumari) NH765 (Hyderabad to Thokapalle, Andhra Pradesh) NH65 (Pune-Machlipatnam) NH163 (Hyderabad to Bhopalpatnam, Chattisgarh) NH161AA (Bhongir-Sangareddy in Telangana)	Hyderabad International Airport	Hyderabad contributes 40% of the total Indian bulk drug production and 50% of the bulk drug exports. Genome Valley in Hyderabad is the first and systematically planned and developed cluster dedicated to life sciences in India. Pharma City being planned.
Bengaluru, Karnataka	AstraZeneca, GSK, Biocon, Cipla, Mylan, Himalaya Drug Company, Kemwell, Novozymes, Merck	Chennai Port (major port) Ennore Port (major port) New Mangalore Port (major port) ICD Whitefield*	NH48 (Delhi-Bengaluru-Chennai) NH44 (Srinagar-Kanyakumari) NH948 (Coimbatore-Bengaluru) NH648 (Dobbaspeth, Karnataka to Hosur, Tamil Nadu)	Bengaluru International Airport	R&D Hub of India with 400+ R&D institutes, and 35 Clinical Research Organisations and 12 Adverse Drug Reaction Reporting Centres. Karnataka contributes ~12% of India's pharmaceutical exports and ~10% of India's pharmaceutical revenues.
Ahmedabad-Halol-Vadodara, Gujarat	Zydus Cadila, Sun Pharma, Torrent Pharma, Glenmark, Alembic, Dishman Group, Claris Lifesciences, Intas Biopharmaceuticals	Kandla Port (major port) Mundra Port Hazira Port ICD Sanand (Thar Dry Port)* ICD Khodiyar*	NH48 (Delhi-Ahmedabad-Chennai) NH228 (Ahmedabad-Dandi in Gujarat) NH947(Sarkhej-Okha in Gujarat) Ahmedabad-Vadodara Expressway	Vadodara and Surat domestic Airports, Ahmedabad International Airport	40% of machinery for India's pharma sector is manufactured in Gujarat. Gujarat has 550+ WHO compliant manufacturing units of ~1,200 units in India. Gujarat is the world's largest producer of contraceptive pills .
Baddi, Solan district, Himachal Pradesh	Ranbaxy, Dr. Reddys Labs, Abbott, Pfizer, Glenmark, Morepen Labs, Unichem Labs, Torrent Pharma, Alliance World India, Cipla, Zydus Cadila, Alembic, Wokhardt	ICD Baddi*	NH105 (Pinjore, Haryana to Swarghat, Himachal Pradesh)	Shimla Airport, Chandigarh International Airport	Himachal Pradesh meets more than 1/3rd demand of demand for pharmaceuticals in Asia. Proposed bulk drug pharma park in Kripalpur in Solan.
Goa (Union Territory)	Pfizer, Abbott, Glenmark, Unichem Labs, Zydus Cadila	Marmagao Port (major port)* New Mangalore Port (major port) at ~350 kms	NH66 (Panvel, Maharashtra to Cape Comorin, Tamil Nadu)	Goa International Airport	Goa contributes ~10% of India's pharmaceutical output. The Goa pharmaceuticals industry is growing at a rate of 15% annually.
Haridwar, Pantnagar, Dehradun, Uttarakhand	Jubilant Life sciences, India Glycols Ltd, Coral Laboratories, Sharon Biomedicine Ltd	ICD Pantnagar ICD Kashipur MMLP Pantnagar	NH 58, NH 109, NH 72	Pantnagar Airport Jolly Grant Dehradun Airport	More than 300 Pharmaceutical units. Pharma exports from the State were worth USD 100+ Mn during 2017- 18 majorly to USA, Russia and Australia. Proposed Medical device park in Haridwar

Indore, Madhya Pradesh with players such as Cipla, Lupin, Piramal Group, Glenmark, Mylan etc. is also a notable cluster.

Maharashtra has multiple scattered clusters such as Pune, Nashik, Tarapur, Aurangabad etc. with players such as Wockhardt, Lupin, Cipla, Merck, J&J,

GSK, Glenmark, Ranbaxy etc. and contributes ~20% to India's pharma output.

Vizag, Andhra Pradesh is an emerging cluster with an established pharma city (Mylan, Laurus Labs, Biocon, Aurobindo Pharma etc.), and a proposed second pharma city.

SECTOR SNAPSHOT

4.4% Share of exports
2018-19

1st Largest vaccine producer, largest provider of generic medicines globally

3rd Largest pharma industry by volume in world

3,000+ Pharma companies with 10,500+ manufacturing facilities

ELECTRONICS & CONSUMER APPLIANCES

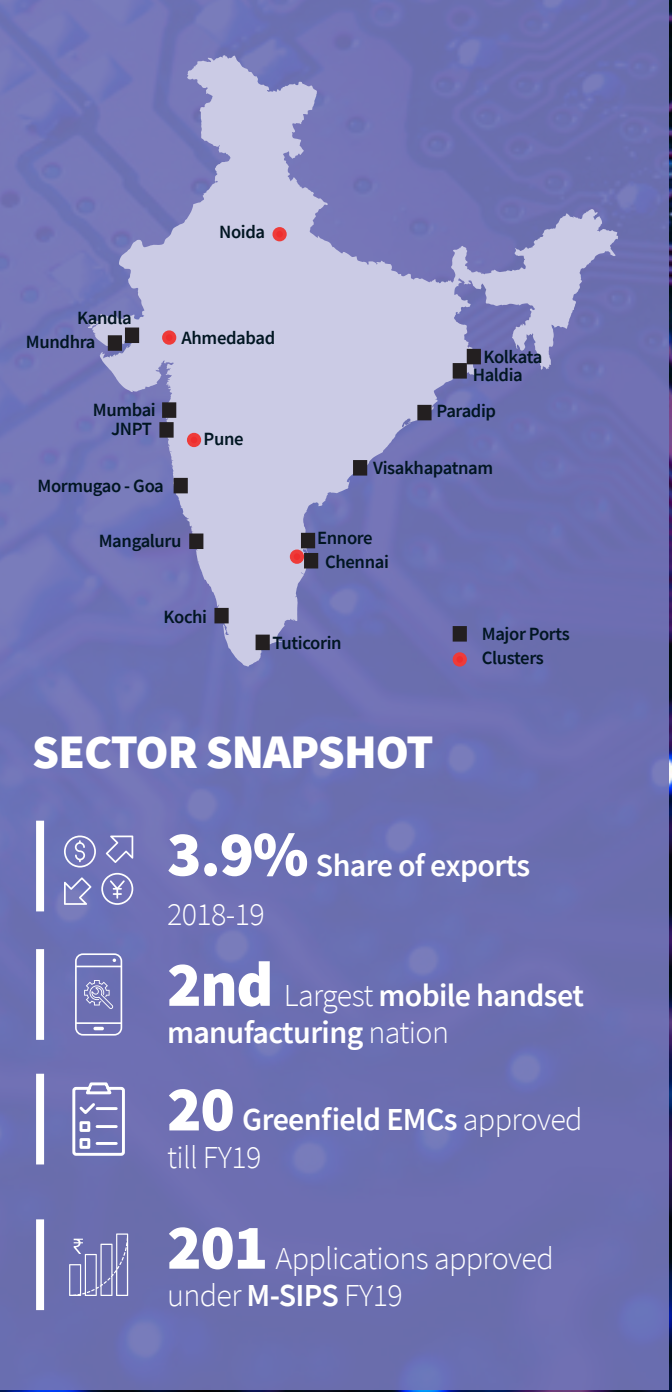
Market Size (FY18): \$65 bn (production)

Expected to be \$400 bn by 2025 (CAGR: 32%)
Consumer Electronics & Appliance Industry in India: 5th largest by 2020

Policy Support:

Electronic Manufacturing Clusters Scheme
National Policy of Electronics 2019, to support the achievement of \$400bn turnover by 2025
Phased Manufacturing Program

Region, State	Major Occupiers	Port / Dry Port Connectivity	Highway Connectivity	Airport Connectivity	Remarks
NOIDA-Greater NOIDA-Yamuna Expressway, Uttar Pradesh	Vivo, Haier, Oppo, Samsung, LG, Xiaomi, Lava International, Karbonn Mobiles, GTN, Labanyo Electronics, Million Club Manufacturing, Intex Technologies, Dixon Technologies (Padget), Bingo Mobiles Tech, Holitech Technology	ICD Dadri* ICD Loni* ICD Khurja* ICD Modinagar*	NOIDA-Greater NOIDA Expressway FNG Expressway NH44 (Srinagar-Kanyakumari) Multiple NH in vicinity to Delhi	Delhi International Airport, Upcoming Jewar International Airport	<p>Biggest mobile phone and accessory manufacturing hub of India – 2/3rds of India’s mobile phones manufacturing in NOIDA-Greater NOIDA.</p> <p>Samsung factory in NOIDA: is world’s largest mobile manufacturing facility.</p> <p>Significant investments by Chinese, Korean and Japanese investors.</p>
Chennai-Sriperumbudur, Tamil Nadu and Sri City-Tirupati, Andhra Pradesh	Foxconn (including Sony), Flextronics, Nokia, Xiaomi, Samsung, Bluestar, Lenovo, Motorola, Dell, Lava, Karbonn Mobiles, Dixon technologies, Celkon, TCL electronics	Chennai Port (major port)* Ennore Port (major port)* Kattupalli Port* Krishnapatnam Port	NH48 (Delhi-Chennai) NH32 (Chennai-Nagapattinam) NH16 (Kolkata-Chennai) NH71 (Madanapalle-Naidupeta in Andhra Pradesh) in vicinity of Sri City	Tirupati Airport (granted international upgrade), Chennai International Airport	<p>Sri Venkateswara Mobile and Electronics Manufacturing Hub and EMC-II are dedicated industrial areas for electronics in Tirupati.</p> <p>Significant hub for manufacturing of consumer appliances.</p>
Pune (Chakan, Ranjangaon)-Aurangabad, Maharashtra	LG, Jabil, Philips, Whirlpool, Bosch, Videocon, Bharat Electronics, Corning, Haier, Honeywell	Mumbai Port (major port); JNPT (major port) ICD Dighi*	NH48 (Delhi-Chennai) NH65 (Pune-Machlipatnam) Proposed Samruddhi Corridor	Mumbai International Airport Pune International Airport	Noteworthy hub for manufacturing of consumer electronics with several international brands of Refrigerators, Air conditioners, Washing machines being manufactured.
Ahmedabad-Sanand, Gujarat	Bluestar, Hitachi, Voltbek (JV of Voltas and Arcelik), Bosch	Kandla Port (major port) Mundra Port Hazira Port ICD Sanand (Thar Dry Port)* ICD Khodiyar*	NH48 (Delhi-Chennai) NH228 (Ahmedabad-Dandi in Gujarat) NH947 (Sarkhej-Okha in Gujarat)	Ahmedabad International Airport	<p>Ahmedabad and Gandhinagar have been notified as EMCs.</p> <p>Prantij (60 kms from Ahmedabad) to have 2 semiconductor wafer fabrication manufacturing facilities by Hindustan.</p> <p>Semiconductor Manufacturing Corporation, along with ST Microelectronics and Silterra.</p>



2 Electronic Manufacturing Clusters have been approved at E-City and Maheshwaram at Hyderabad, Telangana

Established Emerging *within 100 kms

Mumbai - Aurangabad

Maharashtra's New Industrial Belt

Mumbai is the financial, commercial and entertainment capital of India.

Aurangabad is surrounded by the industrial areas of Chikhalthana, Shendra & Waluj MIDC and has been a growing industrial node of Marathwada region.

Scan QR code to access key websites



Maharashtra Industries
Department
Govt. of Maharashtra



Maharashtra Industrial
Development Corporation
(MIDC)



Maharashtra Industry
Trade & Investment
Facilitation Cell (Maitri)

Chattarpati Shivaji Terminus

STATE SNAPSHOT



GSDP Growth
(FY 18): **7.5%**



HDI Rank (2018):
5th Rank



Logistics Performance
Index of State: **3rd Rank**



2nd Rank; INR 2,495 Bn
IEMs Implemented (Jan'14 – Dec'19)



No. of **Factories** in State
(FY 18): **26,393; 3rd Rank**



State's contribution to India's
Exports (FY 19): **22.3%**

Note: Excludes Union Territories

Maharashtra contributes:



35% of India's outout of
automobile by value



20% of india's
software exports



17% of India's
chemicals production



20% of India's
pharmaceutical output



Highest FDI inflow
(30% of all FDI during 2000-19)



Mumbai - Pune Expressway:
Facilitates ease of access to **JNPT**
from various cities in Maharashtra,
including Pune



Hosts **2 major ports**
& 53 minor ports

Capacity expansion to
10 million TEUs
by 2022

JNPT (Jawaharlal Nehru Port):
Largest container port in India,
facilitates **40% of Indian container**
volumes

WHY MUMBAI-AURANGABAD

Mumbai contributes



12th Wealthiest
global city



5% of India's GDP



70% Capital transactions in India



20% of India's warehousing activity located near Mumbai



5 SEZs in Aurangabad

Industrial Cluster for Automotive, Pharma, Aluminium, Renewable Energy developed

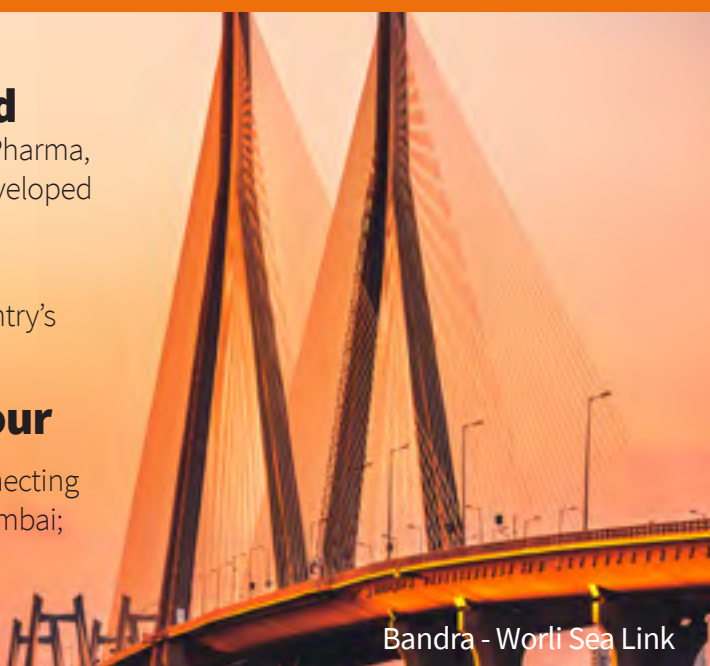


Mumbai is India's **first wi-fi enabled city** with the country's largest public wi-fi service



Mumbai Trans Harbour Link

(under construction): connecting Mumbai with satellite city Navi Mumbai; Longest sea bridge in India once completed



Bandra - Worli Sea Link

Financial Capital of India: Mumbai



Headquarters to **India's 2 biggest stock exchanges**: National Stock Exchange and Bombay Stock Exchange



Headquarters to most Indian state-owned and commercial banks



Headquarters to **financial & monetary regulatory authorities** of India (Securities Exchange Board of India and Reserve Bank of India)



Mumbai Nagpur Super Communication Expressway

Connecting JNPT in Mumbai & MIHAN in Nagpur
Popularly known as **Maharashtra Samruddhi Mahamarg**; presently under construction
710 kms stretch spread over 10 districts and 352 villages



Shendra Bidkin Industrial Area (SBIA)

Area: 84.17 sq.km.
Large scale industrial cluster proposed under Delhi Mumbai Industrial Corridor (DMIC)

SECTOR SNAPSHOT

Emerging Sectors

 <p>Auto & Ancillaries</p> <p>Aurangabad emerging as second Auto Hub of the state after Pune</p>  <p>Skoda, Bajaj Auto, Goodyear Tyres, Hero Chassis Systems, Perkins</p>	 <p>Pharma & Lifesciences</p> <p>State with highest number of US FDA approved plants</p> <p>State with highest number of pharma units</p>  <p>Ajanta Pharma, Johnson & Johnson, Wockhardt, Lupin Pharmaceuticals</p>	 <p>Consumer Durables</p> <p>Brownfield EMCs at Navi Mumbai and Aurangabad</p>  <p>Videocon, Siemens, Liebherr Appliances</p>	 <p>Textiles</p> <p>3 exclusive textile parks in Thane by MIDC</p> <p>Silk and cotton products are prominent in Aurangabad as well</p> 	 <p>IT/ ITeS</p> <p>Mumbai headquarters notable companies like TCS, Infotech, Mastek & Oracle Finserv</p> <p>IIT Mumbai is India's premier engineering college</p> 
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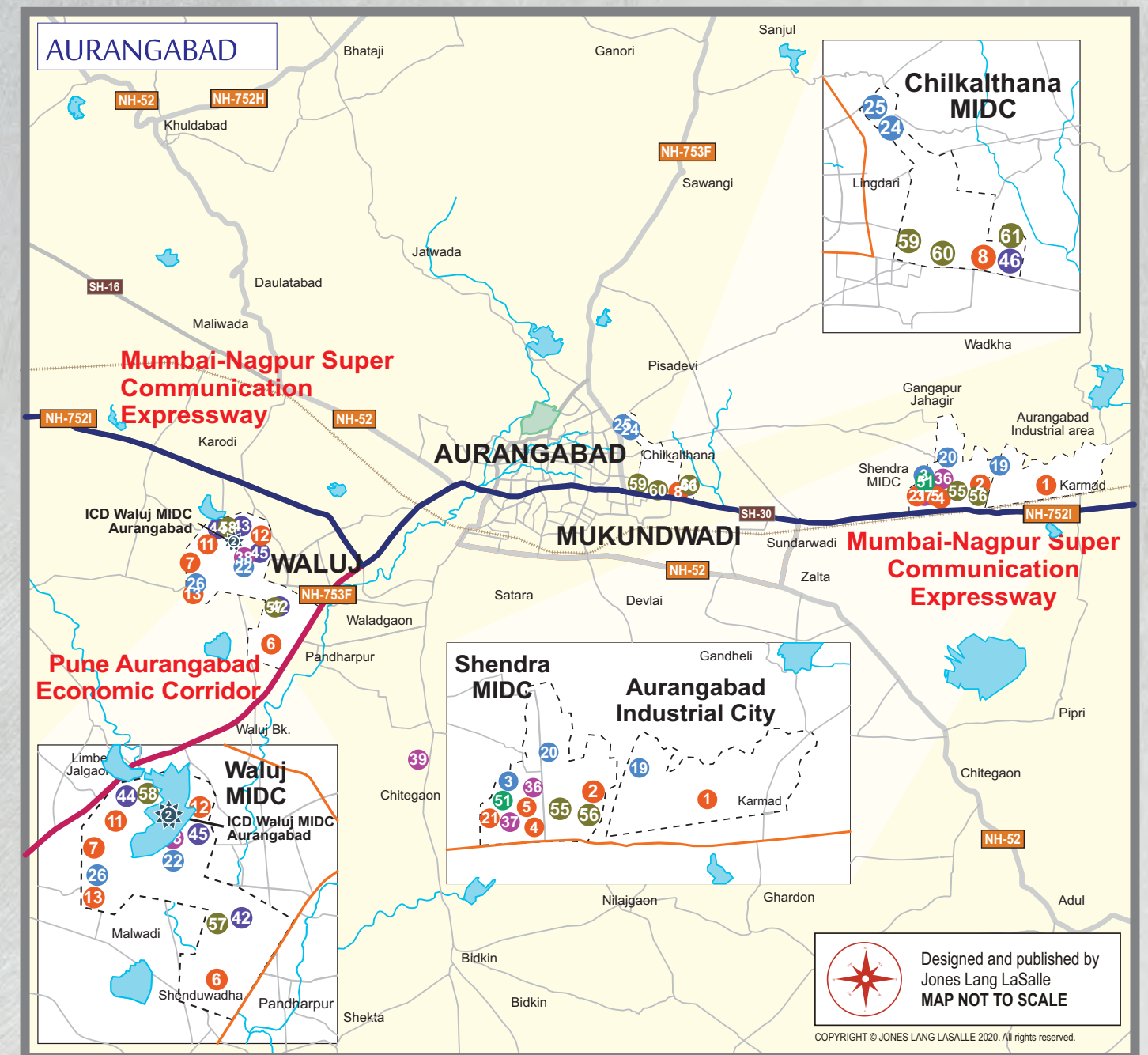
Engineering

Aurangabad emerging as second Auto & Engineering Hub of the state after Pune
Greaves Cotton, Varroc Engineering, Hindalco Almex, Duro Valves

Prominent industrial areas for greenfield and secondary transactions

Industrial Park	Total Area (Acres)	Major Occupiers	Remarks
JNPT SEZ	684	Upcoming. It is in advanced stages of land auction & allotment. Part of India's effort to spur port-led industrialization	Multi-product SEZ with focus on Pharma, Logistics, Electrical and Electronics, Automobile and Auto Components, Food processing, among others.
Panvel – Rasayni Cluster: (Mahad: 2,522, Nagothane: 1,989, Roha: 605, Usar: 536, Vile – Bhagad: 1,846)	7,450	Castrol, Cipla, Reliance, Tata Steel, Hindustan Organic Chemicals, JSW Steel, Bombay Dyeing	Multi-product industrial cluster mostly in Chemical, Steel and Petrochemicals.
Waluj MIDC	3,207	Bajaj Auto, Wockhardt, Colgate-Palmolive, Siemens, Baxter International, MAN Diesel	Focus Sectors: Auto & Ancillary, Engineering, Pharmaceutical.
Chikhalthana MIDC	1,565	Wockhardt Research Center, Lupin, Ajanta Pharma	Prime industrial area in Aurangabad. Focus Sectors: Pharmaceutical & Engineering.
Shendra MIDC	118	Audi, Skoda, Volkswagen, Wockhardt, EtchON, Perkins Engines, Siemens, Hero Chassis Systems, Hindalco Almex	Focus Sectors: Engineering, Electronics.
Wockhardt Infrastructure Development Ltd. SEZ, Shendra	107	Upcoming	Proposed Pharmaceutical & Bio-pharmaceutical manufacturing and research facility.
Aurangabad Industrial City (AURIC)	10,000	Hyosung, Perkins	Greenfield Industrial Smart City as part of DMIC. Massive potential to attract large units.

The major industrial clusters can be identified in Mumbai as Bhiwandi and JNPT vicinity, and in Aurangabad as Waluj, Chikhalthana and Shendra. The land rates in these corridors range between INR 2,400 to INR 13,600 per sqm. The rates mentioned are indicative and may vary on other parameters as well.



Sr. Project Name

AUTO & ANCILLARY

- Hyosung
- Varroc Engineering
- BONATrans India
- Skoda Auto (Audi & VW)
- ZF Hero Chassis Systems
- Bajaj Auto
- Varroc Engineering
- Motherson Advanced Tooling
- Castrol India
- Mobis India
- Goodyear Tyres
- Durovalves India
- Varroc Engineering

CHEMICAL & PETROCHEMICALS

- Reliance Industries
- Hindustan Organic Chemicals
- Pidilite Industries
- Aditya Birla Nuvo
- Asian Paints

ENGINEERING

- Perkins India
- Hindalco Almex Aerospace
- EtchON Marks Control
- MAN Energy Solutions

- Tata Steel BSL
- Greaves Cotton
- Kohler Engines
- Endress + Hauser Wetzler
- Balmer Lawrie Van Leer
- Balmer Lawrie
- Exide Industries
- Alfa Laval
- Linde India
- Parker Hannifin
- JSW Steel
- JSW Steel
- JSW Steel

ESDM

- Siemens
- Liebherr Appliances
- Siemens
- Videocon Industries
- Blue Star
- Siemens

FMCG

- Johnson & Johnson
- United Breweries
- Carlsberg
- Colgate Palmolive

- United Spirits
- Godrej & Boyce Mfg.
- Hindustan Unilever
- Ruchi Soya Industries
- Parle

OTHERS

- Sterlite Technologies
- Petronas Lubricants
- Rolls Royce Marine
- Asahi India Glass

PHARMACEUTICALS

- Wockhardt
- Glenmark Pharmaceuticals
- Baxter Pharmaceutical
- Wockhardt
- Lupin
- Ajanta Pharma
- Cipla
- Lupin
- Zydus Takeda Healthcare

TEXTILE & APPAREL

- Astron Clothing
- Fritzberg
- Bombay Dyeing

ICD & CFS

- ICD Container Corporation of India
- ICD Waluj MIDC

— Mumbai – Nagpur Super Communication Expressway

— Bengaluru – Mumbai Economic Corridor

— Delhi – Mumbai Industrial Corridor

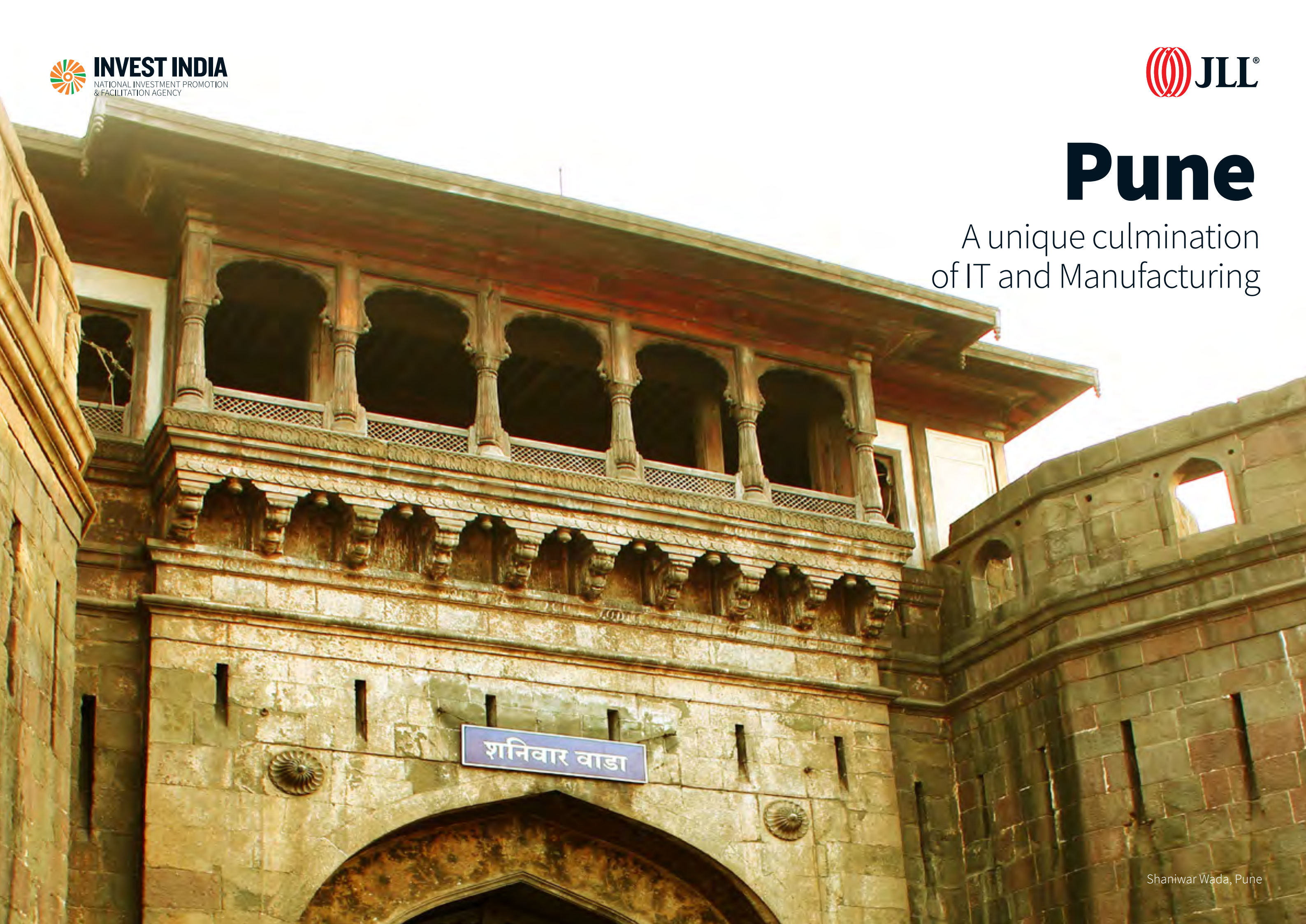
— Pune – Aurangabad Economic Corridor

Well-planned infrastructure, design & sustainability concept were the 3 key main factors which attracted us initially for making the investment at Auric. ICD Jalna Port will act as a boon for the industries who are importing raw material. Upcoming "Mumbai Nagpur Super Communication Expressway" will boost the Logistics & Time efficiency.

-Hyosung Corporation

Pune

A unique culmination
of IT and Manufacturing



Pune attracts about 20% of the entire industrial investment in the country. It is an established automobile hub, durable goods manufacturing hub and an IT hub with several Indian and foreign industry majors. It is often referred to as ‘Oxford of the East’ for its education and research sector with 4 universities, more than 200 colleges and ubiquitous research facilities.

Scan QR code to access key websites



Maharashtra Industries
Department
Govt. of Maharashtra



Maharashtra Industrial
Development Corporation
(MIDC)



Maharashtra Industry
Trade & Investment
Facilitation Cell (Maitri)

Wipro Campus, Pune

STATE SNAPSHOT



GSDP Growth
(FY 18): **7.5%**



2nd Rank; INR 2494 Bn
IEMs Implemented (Jan'14 – Dec'19)



Logistic Performance
Index (2019): **3rd Rank**



No. of **Factories** in State
(FY 18): **26,393; 3rd Rank**



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5th Rank

Note: Excludes Union Territories



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& 53 minor ports

Capacity expansion to
10 million TEUs
by 2022

JNPT (Jawaharlal Nehru Port):
Largest container port in India,
facilitates **40% of Indian container**
volumes

WHY PUNE?

Pune contributes



2nd Largest city of Maharashtra, contributing **1/5th** of State's GDP



3rd largest contributor to India's **IT exports**



Engineering R&D hub : Volkswagen, Mercedes Benz, JCB, John Deere, Force Motors, Tata Motors, Bajaj Auto, Mahindra etc.



Emerging Startup Hub: ~3,200 active startups with 2% of India's tech startups based out of Pune



High concentration of **German, American, Korean** and **Chinese** manufacturers



Ranked #1: Indian cities in Mercer's Quality of Living Index, 2018



Home to major automobile OEMs that include Tata Motors, Mahindra, Bajaj Auto, Force Motors, Jeep, Jaguar, Daimler Chrysler, Mercedes-Benz, Fiat, Volkswagen



The most developed auto ecosystem of India: continuously developing since 1960s

Pune – IT/ITeS hub











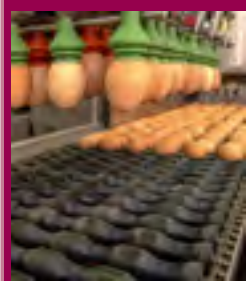

Hinjewadi IT Park: USD 9 Billion project by MIDC spread across 2,800 acres of land. It is home to over 800 IT companies



Various companies such as HSBC Global Technology, IBM, Siemens, EDS, I-Flex, Infosys, Cognizant, Wipro, KPIT, TCS, IBM, Symantec & Zensar, etc. and BPOs such as Concentrix, Aegis have established IT offices in Pune

SECTOR SNAPSHOT

Emerging Sectors

				
Auto & Ancillaries	Pharma & Biotech	Capital and Durable Goods	Food Processing Sector	Industrial Parks and Logistics
Automotive Research Association of India by NATRIP carries out 90% of India's homologation activities	Pune, Nashik, Aurangabad & Mumbai/ Thane form the state's pharma quadrilateral	Brownfield EMC Cluster to be set up Ranjangaon & Khed are well-established consumer durable hubs	Ample availability of dairy, horticulture and fruits	Amongst the hottest markets in India for development of light industrial parks and warehouses
				
Tata Motors, Bharat Forge, Mahindra & Mahindra, Bajaj Auto, Visteon, Volkswagen, Mercedes Benz, JLR	Cipla, Lupin, Genova, Hindustan Antibiotics	JCB, Sany, LG, Haier, Thyssenkrupp, Schindler, Bosch, Hyundai Elevators, Qualcomm, Phillips, Emerson, Bluestar, Whirlpool, Zoomlion	Notable presence: Amul Dairy, Gits Food, Weikfield Products, Mars, Ferrero Rocher, Pravin Masale, Parampara Brands, etc.	Several local and international players — such as Indospace, Embassy, ESR, KSH, Global, Hiranandani — have footprints of 50-100 acres in industrial areas of Pune

Prominent Industrial Areas for Greenfield and Secondary Transactions

Industrial Park	Total Area (Acres)	Major Occupiers	Remarks
Chakan Industrial Area (Indospace industrial Park, Chakan: All Phases – 185 acres)	8,500	Bajaj Auto, Mercedes Benz, Volkswagen, Mahindra & Mahindra, Mubea, Scindler, Huntsman, Tetra Pak, Phillips, GE, Bridgestone, Hyundai Constructions, Thyssenkrupp, Faurecia, Racold, Bhushan Power, Kores, Saint Gobain, Bosch, Huf India, Mahindra Defence Naval Systems, Force Motors, Sany	One of the most sought after industrial area of India. It has both MIDC leasehold and resale freehold properties and has emerged as a major automobile hub. Developed in 5 phases. Phase 5 is under acquisition.
Pimpri Chinchwad Industrial Area	3,025	Thermax, Bajaj Auto, Mahindra & Mahindra, Tata Motors, Jaguar Land Rover, Premiere, Finolex, Lumax Auto, Greaves Cotton, Telco, Force Motors	Oldest automobile industrial area in India located within extended city limits of Pune. Concentration of consumer durables and electronics manufacturing, apart from automobiles.
Talegaon Industrial Area	1,430	Schaeffler, Husco Hydraulics, Genral Motors, Cosma, POSCO, ITC, Emerson, JCB, ushi Fibreglass	Fast developing industrial area adjacent to Chakan. First 2 phases were launched in 2018 and are already leased out.
MIDC, Ranjangaon (Indospace industrial Parks -104 acres)	2,285	LG, Whirlpool, Carraro, Fiat, Jeep India, Tata Auto Components, Bombay Dyeing, ITC, Beakaert, Maccaferri, Haier, Steelcase, Motherson Sumi	Located on Pune-Ahmednagar highway. Focus Sectors: Engineering, Chemicals, Electronics and Textiles.
Khed City	4,200	Hyosung, Mars, JSW Steel	A private park - JV between Bharat Forge (75%) and MIDC (25%).
Kurkumbh MIDC	1,169	Henkel, Cipla, Jsons Laboratories, Reliance	Predominantly, bio-pharma & life sciences industrial area
Hinjewadi Industrial Area	NA	Honeywell, Emerson Auto, Varroc Lightings, Tata Auto Components, Genova Biopharmaceuticals, Henkel Adhesives,	Previously mixed sector industrial area. Now evolved into a major IT and Biotech center.
Serum Bio-pharma Park (SEZ)	57	Serum Institute of India	India's first biotech special economic zone. Focus Sectors: Pharmaceuticals & biotechnology.

The major industrial corridors can be identified along Nagar Road, Hinjewadi, PCMC Bhosari and Chakan Talegaon. The land rates in these corridors range between INR 4,900 to INR 12,500 per sqm. The rates mentioned are indicative and may vary on other parameters as well.

- Sr.

Project Name
- AUTO & ANCILLARY

1

Jeep India Automobiles

2

TATA Auto Components

3

Fiat India Automobiles

4

Bajaj Auto

5

Mercedes – Benz

6

Volkswagen

7

Bridgestone

8

Faurecia

9

Bosch Chassis Systems

10

Huf India

11

Force Motors

12

General Motors

13

Bajaj Auto

14

Mahindra & Mahindra

15

TATA Motors

16

Jaguar Land Rover

17

Premier

18

TATA Auto Components

19

Hyosung T&D

20

Bharat Forge

21

Mubea Suspension

22

Faurecia

23

Lumax Auto Technologies

77

Motherson Sumi

78

Jushi Fiberglass
- ENGINEERING

24

Carraro India

25

Bekaert Industries

26

Maccaferri Environmental Solutions

27

Hyundai Construction Equipment

28

Thyssenkrupp

29

Kores India

30

Schaeffler India

31

HUSCO Hydraulics

32

Cosma International

33

POSCO India

34

Thermax

35

Greaves Cotton

36

Honeywell

37

Emerson

38

JSW Steel

39

JCB

40

SANY Heavy Industries

41

Bhushan Power & Steel
- ESDM

42

Haier Appliances India

43

Whirlpool

44

LG Electronics

45

Philips Electronics

46

Racold Thermo

47

Finolex Cables

48

QualComm Enterprises
- FMCG & FOOD PROCESSING

49

ITC Ltd

50

Henkel Adhesives Technologies

51

Mars Chocolate

52

Gits Food Products

53

Weikfield Foods

54

Henkel Adhesives
- IT/ ITES

55

HSBC Technologies

56

IBM India

57

Siemens Technology

58

Infosys

59

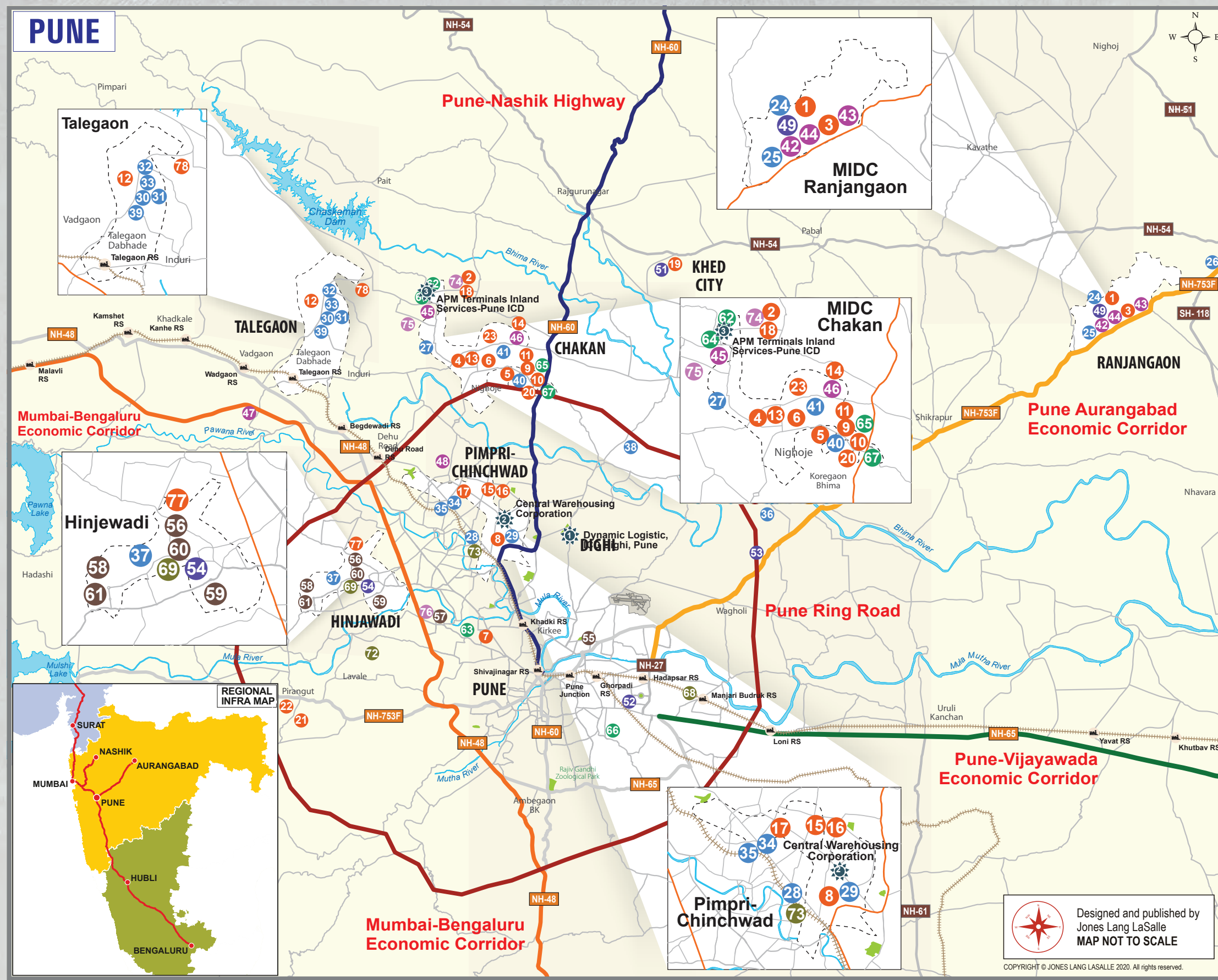
Cognizant

60

Wipro Technologies

61

TCS



- PHARMA & BIOTECH

68

Serum Institute of India

69

Genova Pharmaceuticals

70

Cipla

71

JSONS Laboratories

72

Lupin Ltd.

73

Hindustan Antibiotics
- POWER & ENERGY

74

Schindler India

75

GE India

76

Cummins Generators Technologies
- OTHERS

62

Huntsman International

63

Steelcase

64

Tetra Pak India

65

Saint-Gobain

66

Reliance

67

Mahindra Defence Naval System

- Mumbai – Bengaluru Economic Corridor

Pune – Aurangabad Economic Corridor

Pune Ring Road

Pune – Nashik Highway

Pune – Vijayawada Economic Corridor

“The city is well connected to other parts of the country by rail, road and closer to the port and has a lot of talent (Resources) and a good eco system for Tier 2 and Tier 3 supplier base. Weather is good and the cosmopolitan culture make this city a good place for foreigners to stay. The government also supports with Industry friendly policies.

- Hengli Corporation

NH48

Gurugram-Bhiwadi-Neemrana Corridor
India's Oldest Auto Cluster



The iconic Neemrana Fort, Neemrana, Rajasthan

Erstwhile **NH08**, now **NH48** is the main highway connecting Delhi NCR with Mumbai. Several industrial clusters (Gurugram, Manesar, Bhiwadi, Bawal, Neemrana and Ghiloth) have developed along the highway (especially in the vicinity of NCR) that connects the Northern hinterland to Jawaharlal Nehru Port, Navi Mumbai. Today, it has become the conceptual spine of the DMIC along with WDFC and is one of the fastest growing industrial belts in North India.

Scan QR code to access key weblinks



Haryana Industries
Department,
Government of Haryana



Rajasthan Industries
Department, Government
of Rajasthan



Haryana State Industrial and
Infrastructure Development
Corporation (HSIIDC)



Rajasthan State Industrial
Development and
Investment Corporation
(RIICO)



Haryana Enterprises
Promotion Centre
(HEPC)



Bureau of Investment
Promotion (BIP)

DLF Cyber City, Gurugram

STATE SNAPSHOT - HARYANA



GSDP Growth (FY 18):

7.9%



HDI Rank (2018):

3rd Rank



Logistic Performance Index

(2019) : **3rd Rank**



16th Rank; INR 102 Bn

IEMs Implemented (Jan'14 – Dec'19)



No. of Factories in State (FY 18):

8,891; 11th Rank

Note: Excludes Union Territories



State's contribution to India's

Exports (FY 19): **4.9%**

- **National Capital Region** (NCR): 2 districts of **Rajasthan**, 14 districts of **Haryana**, NCT of Delhi & 8 districts of Uttar Pradesh

- Rajasthan is the state with **highest solar potential** of 142 GW
- Entire Haryana state falls in the influence zone of 2 industrial corridors: Delhi Mumbai Industrial Corridor (DMIC) & Amritsar Kolkata Industrial Corridor (AKIC)
- Haryana is the first state to have implemented its own State Wide Area Network (SWAN):

Digital Inclusion

STATE SNAPSHOT - RAJASTHAN



GSDP Growth (2016-17):

5.5% 23rd Rank



HDI Rank (2018): **13th Rank**



Logistic Performance Index

(2019) : **4th Rank**



8th Rank; INR 321 Bn

IEMs Implemented (Jan'14 – Dec'19)



No. of Factories in State (FY 18):

9,212; 10th Rank

Note: Excludes Union Territories



State's contribution to India's

Exports (FY 19): **1.8%**

WHY NH48

Haryana contributes



20% India's Largest **Automobile** OEMs



3rd Largest exporter of **software**



50% of **Passenger Cars** manufacturing in India



60% **Motorcycles** manufacturing in India

Rajasthan contributes



>100 **Auto component** manufacturing unit.



2nd Largest **mineral producing** state, sole producer of lead & zinc



1st Largest producer of **blended fabric & wool**



1st Only state with all **raw materials for ceramics & glass** industry – silica, feldspar, ball clay, etc.

DLF Cyber City, Gurugram

- 2 out of 8 manufacturing cities in Phase 1 of DMIC are on NH48.
- NH48: **busiest highway** of the country with 57% of freight on trucks
- Narnaul Multi Modal Logistics Park (MMLP): North India's largest MMLP & a major container transshipment hub for the Inland Container Depots (ICDs)
- **Western Peripheral Expressway** — 135.6 km, 6-lane access-controlled expressway connects multiple arterial national highways NH-1, NH-10, NH-48 in a semi-circular arc formation. Fully operational since 2018 resulting in massive logistical efficiency in the region

Haryana's business capital – Gurugram, is home to more than half of the Fortune 500 companies.



Manesar-Bawal Investment Region (402 sq.km.)

- One of the **largest auto hubs in India** (hosts Maruti Suzuki, Harley Davidson, Honda Motorcycle and Scooter India (HMSI))
- Global City Project in Gurugram (Proposed DMIC Node)
- Integrated Multi-model Logistics Hub (MLH) in Narnaul
- International Center for Automotive Technology (ICAT) has been set up at Manesar as a part of National Automotive Testing of R&D Infrastructure Project (NATRIP)












Japanese Industrial Township (JIT), Neemrana

- **1st operational JIT** in India
- Hosts **55+ Japanese companies**. Eg: Daikin, Hitachi Chemicals, NIDEC, Kehin
- Collaborative effort of Government of Rajasthan and JETRO (Japan External Trade Organization)

SECTOR SNAPSHOT

Emerging Sectors

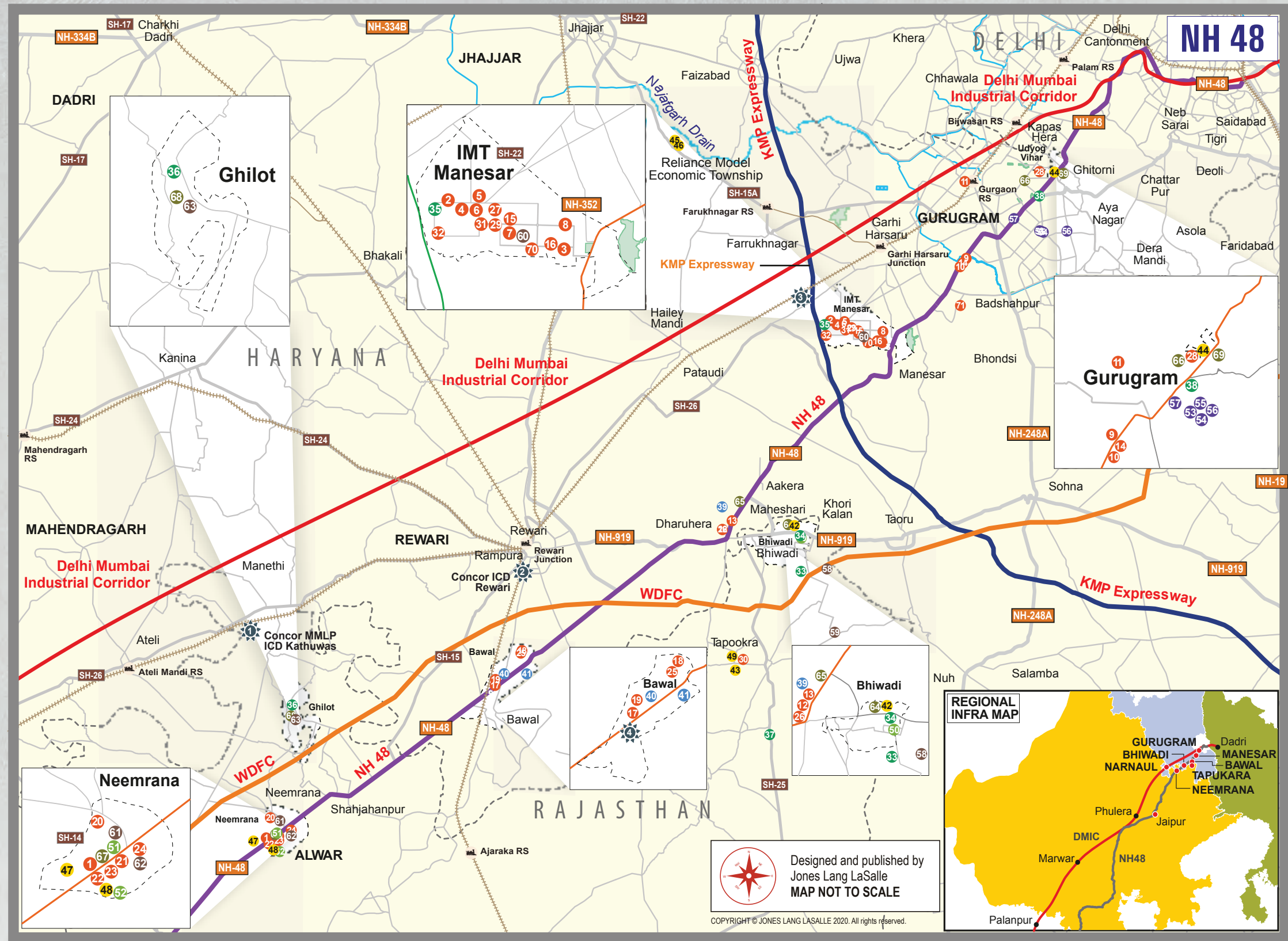
 <p>Auto & Ancillaries</p> <p>NH48: Largest auto ecosystem in India</p> <p>Gurugram-Manesar-Bawal belt is known as “Auto Hub” which accounts for 50% of 4-wheelers & 37% of 2-wheelers manufactured in India</p> <p>Maruti Suzuki, Hero Motocorp, Suzuki Motorcycles, Taiyo Daiichi, Mitsubishi, Jonson Matthey, Minda Group, Keihin, Suzuki powertrain, Munjal Showa, Denso, HMSI, JBM, Musashi, Harley Davidson</p>	 <p>IT/ITeS</p> <p>Gurugram has 1500+ startup companies</p>  <p>Zomato, Shopclues, Uber, Facebook, Google</p>	 <p>FMCG</p> <p>Significant presence of large FMCG sector</p>  <p>Unicharm, British Health Products, Gillette India</p>	 <p>Ceramic and Glass</p> <p>Industrial Zone at Ghiloth by RIICO: First such attempt in India</p>  <p>Major players: Saint Gobain, Kajaria, Jaquar, Parryware, Roca, JCPL</p>	 <p>ESDM</p> <p>Launch of Electronics Cluster of 100 acres at Bhiwadi</p> <p>A few electronics companies starting operations in Gurugram, Bawal and Manesar</p>  <p>Major Players: Fiem Industries, Deki Electronics, Elin Electronics, Vsun</p> <p>Electric Vehicles and Batteries: Dedicated policy under formulation</p>
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Prominent industrial areas for greenfield and secondary transactions

Industrial Park		Total Area (Acres)	Major Occupiers	Remarks
Haryana	Udhyog Vihar, Gurugram	1,125	Maruti Suzuki, Micromax, Sun Pharmaceutical, Euronics India	Industrial estate having more than 1,200 industrial & commercial units & is developed in 6 phases.
	Reliance MET	8,250	Panasonic, Denso, Amber Enterprises	Integrated industrial township consisting of Electronic Manufacturing Cluster, Small & Medium Enterprises Park, Footwear Park & Engineering Park.
	IMT Bawal	1200	Harley Davidson, Minda Furukawa Electric, Haco Group, POSCO, Musashi Auto Parts	Focus Sectors: Auto & Ancillaries, Engineering.
	IMT Manesar	2,087	Maruti Suzuki, Baxter, Honda, Livpure	
Rajasthan	Export Promotional Industrial Park (EPIP), Neemrana	107	Over 150 export – oriented units	Largest Export-Park in Northern India with export oriented manufacturing facilities for Gems and Jewellery, Electronics, Garment, Handicrafts, Engineering, Leather goods & IT Park.
	RIICO Industrial Park, Neemrana (Phase 1 & 2)	650 + 315	Havells, Alchem, Parle, SEL Textiles, HeroMotor Corp	Focus Sectors: Auto & Ancillaries, Pharmaceuticals, Electronics.
	Japanese Industrial Zone, RIICO Neemrana	1,167	Daikin, Nissin Brakes, Mikuni India, Kokoku Intech, Taiyo India, Nippon, NIDEC	MoU between RIICO & JETRO: Encourage Japanese investments through streamlined license process.
	RIICO Industrial Park, Ghiloth	1,700	Havells, Indus Pharma, Urotek Industries, Glocera, Lloyd	Focus Sectors: Glass & Ceramic industries, General Industries.
	RIICO Industrial Park, Karoli	527	Kalyani Technoforge, Groz Engineering Tools, Bhagwati Products, Capstone Polyweave	Auto Zone, EMC zone and General zone.

The major industrial corridors can be identified along NH48 as Gurugram, Bhiwadi, Neemrana, Ghiloth, Manesar and Bawal. The land rates in these corridors range between INR 3,500 to INR 20,480 per sqm. The rates mentioned are indicative and may vary on other parameters as well.

Sr.	Project Name
AUTO & ANCILLARY	
1	Maruti Suzuki
2	Bajaj Motors
3	Honda Motorcycle & Scooter
4	Faurecia Automotive
5	HI-LEX India
6	Subros
7	Calsonic Kansei Motorn Auto
8	Mitsubishi Electric Automotive
9	Tata Motors
10	JTEKT India
11	JPM Automobiles
12	JTEKT India
13	Amtek Auto
14	Rico Auto
15	Motherson Automotive
16	Denso
17	Harley-Davidson Motorcycles
18	Furukawa Minda Electric
19	Musashi Auto Parts
20	Hero Motorcorp
21	NISSIN Brakes
22	Mikuni India
23	Kokoku Intech India
24	TAIYO India
25	Roki Minda
26	JTEKT India
27	Magneti Marelli
28	Maruti Suzuki
29	Johnson Matthey
30	Honda Cars
31	Maruti Suzuki Power Train
32	JBM
70	Johnson Matthey
71	Suzuki Motorcycle
CERAMIC & GLASS	
33	Saint-Gobain Glass India
34	Jaquar & Company
35	Jaquar & Company
36	Glocera
37	Kajaria Ceramics
38	Parryware Roca
ENGINEERING	
39	Jindal Prefab
40	Haco Machinery
41	POSCO
ESDM	
42	Lloyd
43	Micromax
44	Euronics Industries
45	Panasonic
46	Amber Enterprises
47	Havells India
48	Daikin Air-conditioning India
49	FIEM Industries
FMCG	
50	Gillette India
51	Parle
52	Unicharm India
IT/ ITeS	
53	Shopclues Network
54	Zomato
55	Uber
56	Facebook
57	Google
PHARMA & BIOTECH	
64	British Health Products
65	Capsugel Healthcare
66	Sun Pharmaceutical
67	Baxter
68	Alchem International
69	Indus Pharma
OTHERS	
51	Sterilite Technologies
58	Ashirvad Pipes
59	United Breweries
60	Livpure
61	SEL Textiles
62	Nippon Pipe
63	Urotek Industries



- Western Dedicated Freight Corridor
- Kundli Manesar Palwal Expressway
- NH 48
- Delhi Mumbai Industrial Corridor

Manesar, Bawal and Neemrana came across as a natural choice as these were upcoming industrial regions with proximity to Delhi. These industrial corridors are adjacent to the national highway and provide excellent connectivity across India. Presence of leading automotive OEMs, our key customers, in this region cemented our decision further.

-Mr. Nirmal Minda,
Chairman & MD,
UNO Minda

India is about to see a significant change in its emissions strategy, from Bharat Stage IV to Bharat Stage VI standards. This will require heavy-duty vehicle & additional demand for Johnson Matthey's catalysts. We've been very pleased with our existing experience in Haryana: support from government, availability of skilled workers, & excellent infrastructure. We wanted the new plant to be near Manesar, close to major automotive customers.

-Har Nishith Sahai,
Commercial Director,
Johnson Matthey

Noida-Greater Noida-Yamuna Expressway

India's Electronics Manufacturing Corridor



Noida-Greater Noida-Yamuna Expressway was conceptualized and is being developed as a suburb to India's national capital Delhi since 1970s. It has witnessed immense interest from IT/ITeS and electronics hardware manufacturing firms. So far, Noida's development and positioning has been secondary to millennium city Gurugram. Noida-Greater Noida is likely to turn tables over the next decade on the strength of its excellent connectivity — 2 National Highways (NH-24, NH-58), Eastern Peripheral Expressway and expansion of Noida Metro. It is located at the intersection of the Western and Eastern Dedicated Freight Corridors (DFCs) and is also the gateway to the Delhi Mumbai Industrial Corridor (DMIC). Jewar Airport will be the largest airport in India. This region will be India's electronics manufacturing hub and home to largest foreign direct investments cases.

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Directorate of
Industries, Government
of Uttar Pradesh



Uttar Pradesh State Industrial
Development Authority



NOIDA Industrial
Development Authority



Greater NOIDA Industrial
Development Authority



Yamuna Expressway
Industrial Development
Authority

Yamuna Expressway, Linking Greater Noida to Agra and Lucknow

STATE SNAPSHOT



GSDP Growth (FY 18):
7.0%



Logistic Performance
Index (2019) **9th** Rank



HDI Rank (2018):
18th Rank

Note: Excludes Union Territories



10th Rank **INR 245 Bn**
IEMs Implemented (Jan'14 – Dec'19)



No. of **Factories** in State
(FY 18): **15,830; 5th** Rank



State's contribution to **India's**
Exports (FY 19) : **4.8%**

UP contributes:



1st producer of foodgrains in
India (FY 18) **18.5%** of total



1st number of micro, small and
medium enterprises in India.
14.2% of total



15% of India's population. **Biggest**
consumption & labor
pool (~200 Mn)



2nd largest producer of
leather products in India



UP Electronics Manufacturing
Policy, 2017: State's vision to be
the Electronics Manufacturing Hub
of India



One District, One Product: 57
Districts in UP will be encouraged
to develop product-specific clusters
to encourage higher value addition
and employment creation



Government of India's Phase
Manufacturing Program (PMP)
and Electronic Manufacturing
Clusters (EMCs)

- Noida, Greater Noida and Yamuna Expressway are declared EMCs
- UP biggest beneficiary of PMP, as it attracted majority of the component suppliers of Samsung, OPPO, Vivo and Xiaomi

WHY NOIDA-GREATER NOIDA?

Noida-Greater Noida contributes:



40% of India's total **mobile manufacturing**



55% of India's **mobile component** manufacturers



Biggest agglomeration of Chinese factories in India



Eastern Peripheral Expressway

- 135 Kms 6-lane access-controlled expressway has improved connectivity of Noida-Greater Noida-Yamuna Expressway region with the busiest national highway of India NH-48. It connects in an arterial format NH58, NH24, NH91 and NH2, and is fully operational since 2016

Several **South Korean** and **Japanese** OEMs and ancillaries present in electronics and auto sector

- Large number of units in garmenting, metal fabrication, rubber & plastic parts are present

Largest electronics cluster in India with multiple anchor tenants such as Samsung, OPPO, Vivo, LG, Haier, Dixon, Delphi, Denso



NOIDA Cityscape

Jewar International Airport



Second international airport in Delhi National Capital Region: Likely to change the fortunes of the region's realty and spur industrial activity



Conceptualized over 5,000 hectares and equipped to handle 70 Mn Pax









Planned to be the **biggest aerotropolis** in India



Phase I: 1,334 hectares. Swiss firm Zurich won development contract. It is expected to be operational by 2023

SECTOR SNAPSHOT

Emerging Sectors

 <p>Electronics Manufacturing (ESDM)</p> <p>Largest electronics manufacturing zone of India</p> <p>94 large mobile phones & components manufacturing facilities. ~2,900 medium and small electronics units</p> <p>Samsung, LG, Haier Appliances, OPPO, Vivo, Dixon, Delphi, Denso, Hipad, Transission</p>	 <p>Auto & Auto Ancillaries</p> <p>4 major OEMs manufacturing cars, tractors and two-wheelers</p> <p>~30 ancillary units supplying auto components established in the catchment</p> <p>Honda Cars, Yamaha, Hero Motors, New Holland Tractors, Mahle, Caparo Engineering, Subros, JBM</p>	 <p>IT/ITes</p> <p>Presence of large IT & E-commerce companies in Noida: PayTM, Adobe India, Oracle India, Wipro, HCL Technologies</p> 	 <p>Food Processing Sector</p> <p>Noida & Greater Noida will also attract industries like Food Processing targeting the huge consumption market of Delhi and nearby suburbs such as Gurugram, Ghaziabad, Faridabad</p> 
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Prominent Industrial Areas for Greenfield and Secondary Transactions

Industrial Park	Total Area (acres)	Major Occupiers	Remarks
Noida Special Economic Zone	310	Moserbear, PC Jewellers, Orient, Tech Mahindra, NTT Data	Established in 1985, hosts over 250 units employing 40,000 employees mainly in Gems & Jewellery, Engineering and Software development sector.
Noida – Industrial plots at Sectors 57–68 (except Sector 66)	-	Hipad, XIHI Technology, Sunwoda, FROG Cellsat, Eastcompeace, Chenyang Electronics, Xiaolin Electronic, TMB Battery, Lite-on, NTL Electronics	No vacant plots but heavy sub-leasing activity since 2015 when Chinese and Korean suppliers of electronics components started entering Indian market.
Noida – Industrial plots at Sectors 80–90 (except Sector 86 & 88) and Sector 138–140 A	-	Samsung, Keihin India, Morioku Technology, TS Techson, PPAP Automotive, Schenck RoTec, Dong Jin Electronics, Yingtong Electronics, SMC Corp., Lianchuang Electronic, Dixon Technologies, Westway Electronics, Halonix	Samsung is the key occupier: TV production (1997), expanded to microwaves, air-conditioners, refrigerators, mobile phones (2005), expanded smartphone capacity to 120 mn units (2018).
Surajpur Industrial Area (Phase A, B, C, IV, V)	2,541	Honda Cars India, Yamaha, JBM Auto, Moserbear, Motherson Sumi, Mahle, Denso, Delphi	UPSIDC industrial parks. Focus Sector: Auto & Ancillaries.
EPIP Greater Noida	211	Remso Control Technology, Ashoka Machine Tools	Encourages the export of various commodities and services.
Integrated Industrial Township Greater Noida Limited (IITGNL)	747.5	Haier (anchor investor), Forme Trading	Being developed as an integrated industrial township under DMIC.
World Trade Center (WTC), Greater Noida	42	Vivo (Rented Factory)	Vivo has leased 800,000 Sq Ft at WTC Noida for its production facilities since 2015.
Greater Noida – Ecotech I & Extn I, II, III	2,446	LG, Toyo Ink, ST Microelectronics, Dana Graziano, Dongkuk Steel, ILJIN Electronics, OPPO Mobiles (Rented), Sony, Intex, Pepsico, Global Autotech, New Holland Fiat, Minda Corp, Hollitech, Shinkwang Electronics, Le Mei Plastic	Greater Noida's exclusive industrial area with focus sector: electronics manufacturing.
Greater Noida – Ecotech VI, VII, VIII	-	OPPO Mobiles, OPPO-TEEMA JV, Intex Technologies	Ecotech VII (110 acres) was leased to OPPO and 100 acres at Ecotech VI leased to JV of OPPO and TEEMA in 2016.
Greater Noida – Ecotech X, XI, XII	-	Anrick Electronics, SAMKWANG	Electronics component units are key occupiers.
Yamuna Expressway – Sector 24, 24A, 28, 29, 32, 33	5,913	Vivo, Yingtong, XIHI Technology, Patanjali Foods	Greenfield facilities attracting electronics companies operating on rented factories in Noida and Greater Noida.

Land rates in Greater NOIDA and Yamuna Expressway vary between INR 4,000-11,000 per sq.m. Rentals vary between INR 22-23 per sq.ft per month.

Bengaluru

India's Silicon Valley



Bengaluru often referred to as the Silicon Valley of India, is also an established headquarters to some of the largest public sector heavy engineering industries.

Over the last few decades, the city has marched ahead by leaps and bounds to emerge as a leader in a plethora of sectors, backed by a robust IT, R&D and startup ecosystem, its highly skilled workforce and amiable weather are two standout features.

Scan QR code to access key weblinks



Department of Industries
and Commerce,
Government of Karnataka



Karnataka Industrial
Area Development
Board (KIADB)



Karnataka
Udyog Mitra (KUM)

Vidhan Soudha, Bengaluru

STATE SNAPSHOT



GSDP Growth (FY 18):
10.1%



No. of Factories in State (FY 18):
13,518; 7th Rank



Logistic Performance Index
(2019): **3rd Rank**



3rd Rank; INR 742 Bn
IEMs Implemented (Jan'14 – Dec'19)



HDI Rank (2018):
7th Rank

Note: Excludes Union Territories



State's contribution to India's Exports
(FY19): **4th Rank, 12.7%**

Karnataka contributes:



65% of Aerospace-related exports from India



20% of national garment production



3,500+ IT/ITES
companies



1/3rd of biotech
exports from India



Headquarters to some of the largest Public Sector Undertakings of India

Hindustan Aeronautics Limited (HAL), National Aerospace Laboratories (NAL), Indian Space Research Organisation (ISRO), Bharat Earth Movers Limited (BEML) among others

Pioneer State in policy for niche segments



Startup
Policy



AVGC Policy
and Digital Media City



Electric Vehicle
and Energy Storage Policy



Dedicated
Aerospace Policy

WHY BENGALURU

Bengaluru contributes



70% of India's **chip designers** work in Bengaluru



60% of India's **machine tools production** in terms of value



30% of all **IT start-ups** in India



Startup capital of India: 3rd highest number of startups in the world & among the top 15 startup ecosystems in the world



Established vendor ecosystem: **2,000+** SMEs focused on component manufacturing, tooling and testing equipment and assembling



Home to **535** of **IoT startups** out of **~970** in India



Largest number of R&D centers in India: home to **400+** MNCs with global R&D centers



4th largest **technological hub** in the world & largest in Asia



Home to global R&D centers such as Texas Instruments, Mercedes Benz, Rolls Royce, Airbus, Boeing, ABB, Dell, GE, SAP, Adobe, Cisco, Honeywell etc.

Robust R&D & academic environment



Common instrumentation facilities: IBAB, Ganit Lab, CoE-IoT, Centre for Human Genetics, Centre for Nano Science & Engineering, IIIT-B, Semi conductor measurement, analysis & reliability test lab, Central Manufacturing Technology Institute (applied R&D), Bengaluru Bioinnovation Centre, CCAMP



Knowledge and Skills Hub: 1,700+ public and private ITIs, 200+ engineering colleges, 400+ R&D institutes, 200+ polytechnics, 20+ universities, 325 Skill Development Centres

SECTOR SNAPSHOT

Emerging Sectors

 <p>Aerospace</p> <p>Dedicated Aerospace Policy</p> <p>Major presence of HAL, NAL, Taneja Aerospace, AirWorks Engineering, ThyssenKrupp, etc.</p>  <p>Tech Support Offices of Boeing, Dynamatic Technologies, Airbus, QuEST Global, Collins Aerospace</p>	 <p>IT & ITeS</p> <p>38% of India's IT export</p> <p>NASSCOM Startup WH, GfTS, Mobile 10X Startup Hub, ELEVATE 100, IIIT-B among others</p> 	 <p>Heavy Engg. & Machine Tools</p>  <p>Integrated Machine Tool Industry Park</p> <p>Well established foundry clusters at Belagavi & Shivammoga, emerging at Dobbaspeth</p> 	 <p>Textiles & Apparel</p> <p>First state to roll out State Textile Policy</p> <p>Gokaldas Exports, Goodwill Fabrics among others</p> <p>Established handloom clusters, Planned Apparel Zones, 4 planned Integrated Textile Park, Silk City</p> 	 <p>Pharma & Biotech</p> <p>Dedicated Biotech Policy</p> <p>Bengaluru Bio-Innovation Center with instrumentation facilities, Pharma & Med Tech zone</p> 	 <p>Automobile</p>  <p>Well established hub of automobiles. Likely to emerge as important cluster for electric vehicles and storage solutions. Mahindra Electric, Ather Energy, Bosch</p>  <p>Electric Vehicle & Energy Storage Policy</p>
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Prominent industrial areas for greenfield and secondary transactions

Industrial Park	Total Area (Acre)	Major Occupiers	Remarks
Narasapura - Kolar	701	Mahindra Aerospace, Honda, Scania, Wistron	Dedicated area for Automobile & General Industries which include, Power, ESDM, etc. GSK has its largest greenfield tablet manufacturing facility.
Vemagal	666	GSK, TATA Power, Mitsubishi Electric	
Harohally (Phase I, II, III)	2,380	Upcoming	Multi-product industrial park.
Vasantha Narasapura (Phase I, II, III)	3,665	Wipro, Kirloskar Electrical	IT/BT Precision & Electronic Industries, Garments & Food Processing/Chemicals, & Other General Industries (Machine parts, Automobile industry, etc.).
Tumakuru Machine Tool Park	530	Upcoming	India's 1st integrated machine tool industry park.
Japanese Industrial Park	520	Upcoming	Industrial cluster to facilitate OEMs and ancillary units with exclusive township-cum-industrial zone.
Taiwanese Park, Devanahalli	160	Upcoming	Part of Hardware Park, to be established by CDC & will be accommodating 100 companies from Taiwan.
Sira Phase I	815	Upcoming	To be developed as model industrial layout through private sector participation.
Bengaluru Aerospace Park	732	Wipro, Tyco, Shell, Theysenkrup, Starrag India	Earmarked Zone for Aerospace Component Industries, IT Industries, Defence Industries.
Bengaluru Aerospace SEZ	252	Aerospace Common Finishing Facility, Dynamatic Technologies Limited, Centum Electronics	In collaboration with US Aerospace Supplier Development Mission to India in order to introduce American companies to Indian joint venture groups.
Bengaluru Hardware Park	849	Readink Technologies, OLEO India	Hard Ware Park, IT/BT Park & General Industrial Area
Bidadi (Phase I, II)	1,498	Toyota, Bosch, Britannia, Coca Cola	Industrial area for automobiles, Heavy Engineering & FMCG.

The major industrial corridors can be identified as along Tumkur Road, Hosur Road, Hoskote - Narasapura - Vemgal and along Mysore Road - Bidadi. The land rates in these corridors range between INR 3,500 to INR 8,500 per sqm. The rates mentioned are indicative and may vary on other parameters as well

Sr. Project Name

AEROSPACE

- 1 CSIR-NAL
- 2 HAL Aerospace Division
- 3 Taneja Aerospace
- 4 AirWorks
- 5 Thyssenkrupp Aerospace
- 6 Mahindra Aerospace

AUTOMOBILE & AUTO ANCILLARY

- 7 Tokai Rika Minda
- 8 Honda Motorcycle & Scooters
- 9 Scania Commercial Vehicles
- 10 Toyota Kirloskar Motor
- 11 Volvo Bus Plant
- 12 Tafe Tractors
- 13 TVS Motors
- 14 Ace Forge
- 15 Motherson Sumi
- 16 Mahindra Electric Mobility
- 17 Ashok Leyland
- 18 Bosch Rexroth
- 19 Federal-Mogul Goetze

FMCG

- 20 Indo Nissin Foods
- 21 Coca - Cola Beverages
- 22 Pepsico
- 23 Unibic
- 24 Mars/Wrigley

HEAVY ENGINEERING & MACHINE TOOLS

- 25 BEML Limited
- 26 Hindustan Machine Tools
- 27 LM Wind Power Blades
- 28 ABB
- 29 Mitsubishi Electric
- 30 Tata Power
- 31 Kirloskar Toyota Textile Machinery
- 32 Otis Elevators
- 33 TATA Advanced Materials Limited
- 34 Bosch
- 35 Volvo Construction Equipment
- 36 Doosan Bobcat
- 37 Rail Wheel Factory

IT & ITES

- 38 Google
- 39 NVIDIA Graphics
- 40 Adobe

OTHERS

- 41 BEL-THALES Systems
- 42 Hitachi
- 43 Molex
- 44 Herman Miller
- 45 Carl Zeiss
- 46 Saint Gobain Gyproc
- 47 United Breweries
- 48 Wistron Infocomm (Apple)
- 49 OLEO India
- 50 Cellcomm Solution

PHARMA & BIOTECH

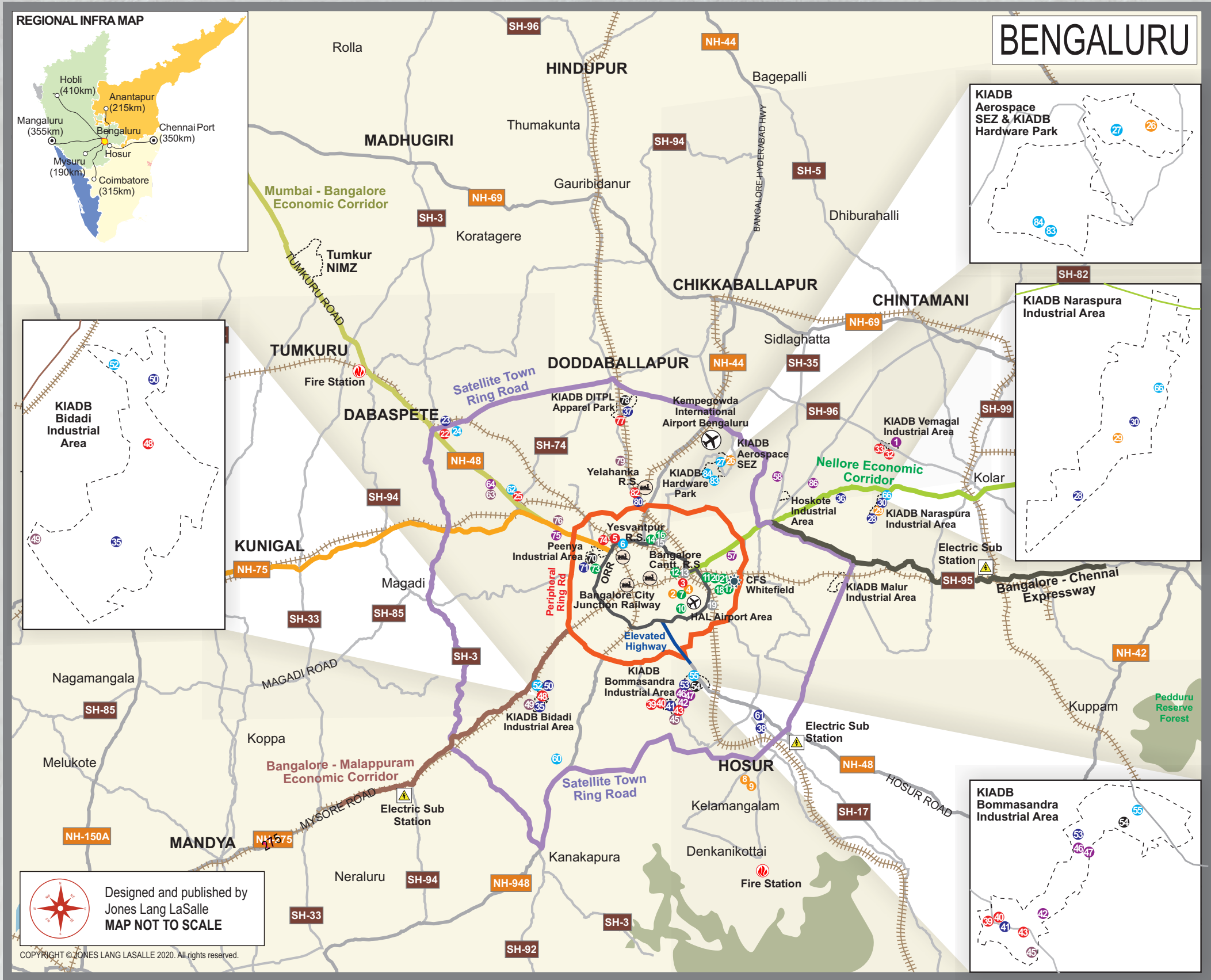
- 51 Glaxo Smith Kline
- 52 Mylan Laboratories
- 53 Biocon
- 54 Sigma Aldrich - Merck
- 55 Cipla
- 56 Sun Pharmaceuticals
- 57 Kemwell Biopharma
- 58 Himalaya Drug Company
- 59 Medreich Limited

RESEARCH & DEVELOPMENT

- 60 ISRO, U R Rao Satellite Centre
- 61 DRDO
- 62 Airbus
- 63 Boeing
- 64 Rolls-Royce
- 65 Philips Innovation Campus
- 66 Mercedes-Benz R&D
- 67 SAP Labs
- 68 ABB Ability Innovation Center
- 69 GE Digital Hub
- 70 Rallis Innovation and Chemistry Hub

TEXTILE & APPAREL

- 71 Arvind Fashions
- 72 Paragon Polymers
- 73 Bombay Rayons



- Outer Ring Road
- Peripheral Ring Road
- Elevated Highway
- Satellite Town Ring Road
- Bangalore – Malappuram Economic Corridor
- Bangalore – Mangalore Economic Corridor
- Bangalore – Nellore Economic Corridor
- Bangalore – Chennai Economic Expressway
- Mumbai – Bangalore Economic Corridor

“The entrepreneurial spirit in Bengaluru is bolstered by several programmes and government initiatives. The city is home to thousands of start-ups looking to create digital solutions to support various sectors. Our R2 Data Labs housed in Bengaluru acts as an acceleration hub for data innovation, manufacturing and operational efficiencies.”

- Rolls Royce

“We are very excited to begin test batch production at our largest manufacturing facility in India in Vemgal, Kolar district, Karnataka. We have invested more than INR 1000 crores to build this state-of-the-art facility, which at its full utilisation, has the capacity to produce 9 billion tablets and capsules. Karnataka offers a right mix of socio-economic and political environment and has the infrastructure and skill base to pull investors.”

- A. Vaidheesh, MD, GSK Pharmaceuticals Ltd

Chennai

Detroit of India

May 2020

St. Thomas Cathedral Basilica, Chennai



Chennai is the largest industrial and commercial center of South India. From Madras to Chennai, this city has historically embraced diversified industries. The city is a hub for the manufacturing of automobiles and auto components, engineering, textiles and garments, leather products, software and IT-enabled services.

Scan QR code to access key weblinks



Industries
Department, Government
of Tamil Nadu



State Industries
Promotion Corporation
of Tamil Nadu (SIPCOT)



Tamil Nadu Industrial
Development
Corporation (TIDCO)



Guidance
Tamil Nadu

Shore temple at Mahabalipuram, Tamil Nadu

STATE SNAPSHOT



GSDP Growth (FY18):

7.7%



HDI Rank (2018):

4th Rank



Logistic Performance Index

(2019) : **5th Rank**



14th Rank; INR 143 Bn

IEMs Implemented (Jan'14 – Dec'19)



No. of Factories in State (FY 18):

37,787; 1st Rank

Note: Excludes Union Territories



State's contribution to India's Exports

(FY19): **3rd Rank, 11.5%**

Tamil Nadu contributes:



2nd highest contributor to India's

renewable energy capacity



4th largest **software exporter** from India



21% of the total **auto exports** from India



1st apparel production and **2nd in textile production** in India (Coimbatore & Tiruppur are key clusters)



5th largest producer of **pharmaceutical production** in India



15% India's **electronic hardware** production



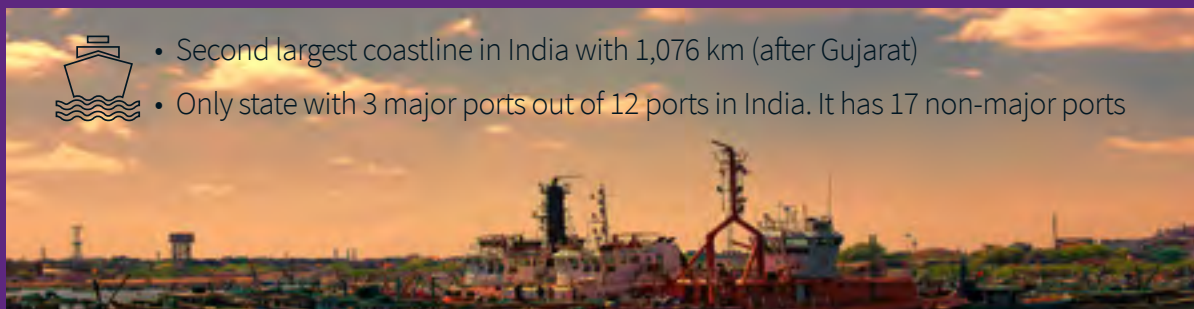
2nd Highest exporter of **engineering products** in FY18



1st largest **tyre manufacturer** in India



- Second largest coastline in India with 1,076 km (after Gujarat)
- Only state with 3 major ports out of 12 ports in India. It has 17 non-major ports



WHY CHENNAI?

Chennai contributes



30% of India's 4-wheeler **automobile** industry



33% of India's **auto parts production**



16% of India's **electronics hardware** production
(computers, electronics & optical products manufacturing)










- Annual installed capacity of 1.46 Mn automobile units
- Offshore Engineering hub: Research Institutes such as IIT, National Institute of Ocean Technology, C-WET, Indian Maritime University, etc.
- Engineering centres of Vestas, Siemens Gamesa, Suzlon, Ingersoll Rand, Petrofac, Mott McDonald, TechnipFNC, McDermott, etc.



Chennai – Gateway to the World

- Port Infrastructure: Only city to have 3 modern container ports (Chennai, Ennore, Kattupalli)
- Combined handling capacity of 5.7 Mn TEUs **(largest for any city in India)**
- Chennai Port: 2nd largest container port in India after JNPT, Mumbai
- Closest point in India to major manufacturing ecosystems such as China, Korea, Taiwan, Japan & ASEAN

SECTOR SNAPSHOT

 <p>Auto & Ancillaries</p> <p>45% of India's total automobile exports (FY18)</p> <p>Dedicated Auto R&D Hub: Mahindra Research Valley, NATRIP & CVRDE facilities</p> <p>BMW, Hyundai, Ford, Peugeot, Mitsubishi, TVS Motor, Ashok Leyland, Royal Enfield, CEAT, Daimler, TVS, Mitsubishi, Michelin, Yamaha, Mahindra & Mahindra, Apollo Tyres, MRF, Renault-Nissan</p>	 <p>ESDM</p> <p>20+ electronic hardware technology firms at Sriperumbudur, Oragadam & Mahindra World City</p> <p>Foxconn, Flex, Samsung, Nokia, SalComp, Dell, Sanmina</p> 	 <p>Heavy Engineering</p> <p>3rd in India's production of General Purpose and Special Purpose Machinery</p>  <p>Ashok Leyland, Doosan, Alstom, Bonfiglioli, Vestas, Caterpillar, Komatsu, Siemens Gamesa, Toshiba</p>	 <p>IT & ITes</p> <p>Data Centre Hub: City with largest bandwidth in India through 3 submarine OFC cables</p> <p>10% of India's total IT exports (FY19)</p> <p>TIDEL Parks, IT Corridor on Old Mahabalipuram</p> 	 <p>Medical Technology: HLL Medipark being developed as a medical technology manufacturing cluster, in 330 acres of land in Chengalpattu</p> <p>Life Sciences & Biotechnology: TIDCO Centre for Life Sciences (TICEL) Biotechnology Park I: First biotechnology Incubation Park in Tamil Nadu</p> <p>Aerospace & Defence: One of two India's dedicated defence corridors (Chennai, Hosur, Salem, Coimbatore, Tiruchirappalli). Other is in Uttar Pradesh</p> 
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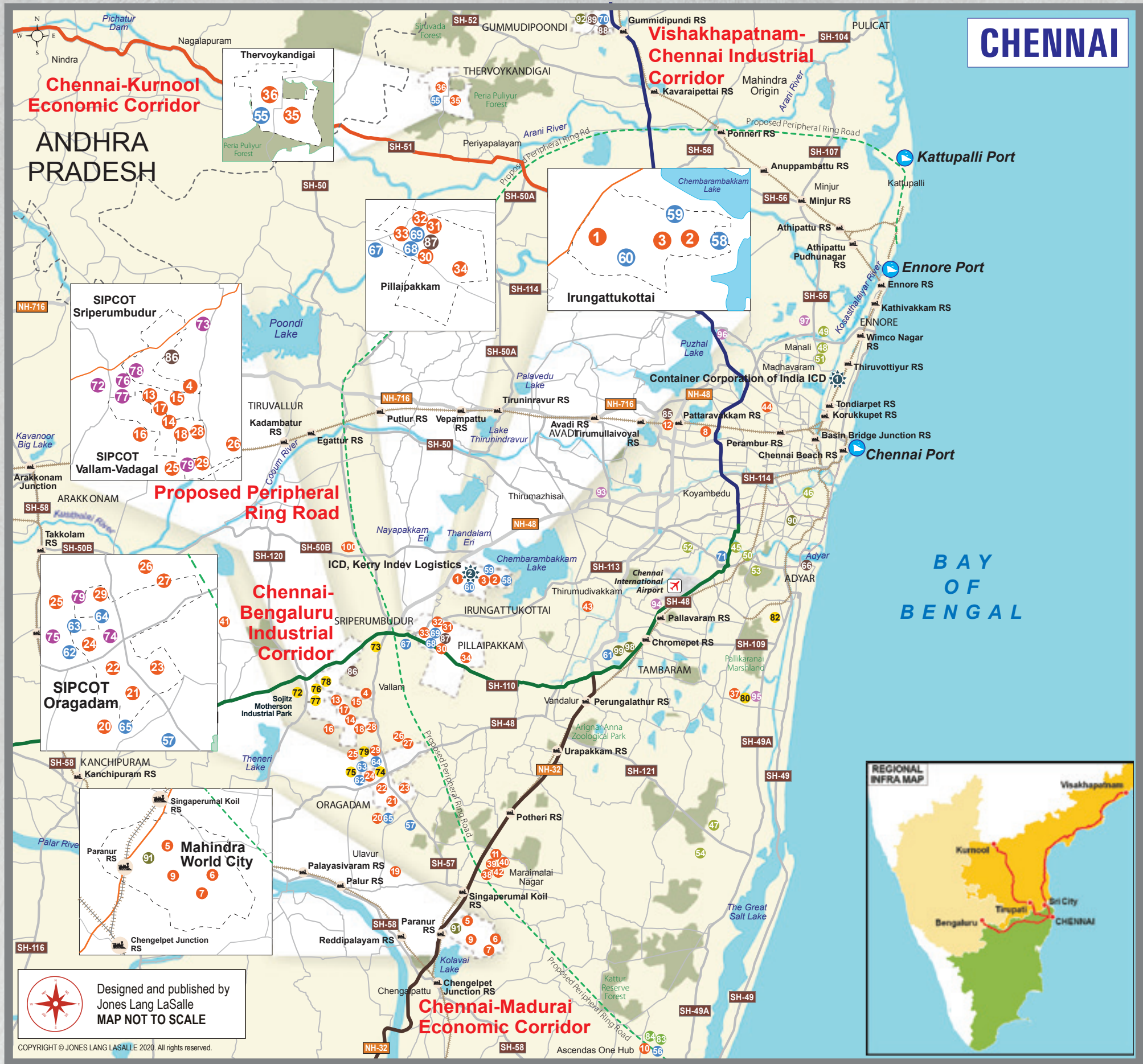
Prominent industrial areas for greenfield and secondary transactions

Industrial Park	Total Area (Acres)	Major Occupiers	Remarks
Mahindra World City	1,525	BMW, B Braun, Nera Electronics, TTK Group, TVS Group, Linea Fashions, Nexteer, NTN, Renault Nissan	First operational greenfield SEZ in India comprising IT, Auto & Apparel SEZs. Most successful integrated industrial township in India.
Ascendas One Hub	1,250	Ajinomoto, Takasago, Maruchan Ajinomoto, Hitachi Automotive	Integrated Industrial township for auto & general machinery, one of 12 Japanese Industrial Townships in India.
SIPCOT Oragadam Industrial Growth Centre	2,727	Royal Enfield, Motherson Sumi, Apollo tyres, Nokia, Komatsu, Bosch, Renault Nissan, Posco ICPC, Daimler, Bridgestone, GK Driveline, Valeo, Seoyon E-HWA Automotive, Subros	Major concentration of automotive & auto ancillary units in Chennai. Several private parks with ready built infrastructure have sprung near this zone.
SIPCOT Vallam - Vadagal	1,503	Roki Minda, Yamaha, Sekisui DLJM Moulding, Koyama Precision, Royal Enfield, Valeo Lighting,	Automotive & auto ancillary cluster
SIPCOT Aerospace Park, Vallam	345	Upcoming	Integrated manufacturing SEZ with exclusive zone for Aerospace components & defence production and aircraft MRO. Identified as one of the two Defence Industrial Production Corridor by GoI.
Pillaiyakkam & R&N Industrial Park	847	CMR Toyotsu, FCC Clutch, MEI Foundry, Royal Tyres, United Industries Plastic, Uno Minda, Yurozu JBM, JK Tyres	Automotive & auto ancillary cluster.
SIPCOT Irungattukottai	1,811	Hyundai, Tata Bluescope, AIS Auto Glass, Schwing Setter, Hwashin Automotive, Polyhose	Automotive & auto ancillary cluster: Hyundai is the major occupier along with ~ 15 component suppliers.
SIPCOT Sriperumbudur	2,220	Asian Paints, Saint Gobain, Hitech Plast, Nippon Paint, Nokia, Salcomp, Faurecia, Ashok Leyland	Automobiles, Electronics and Float Glass.
SIPCOT Hitech SEZ	572	Dell, Motorola, Samsung, Foxconn	Focus greenfield industrial area for Electronics Manufacturing.
Madras Export Processing Zone (MEPZ)	265	Venture Power Systems, Indian Terrain Fashions, Godrej & Boyce	One of the seven export processing zones in India set up by the central government.
Gummidipoondi Industrial Complex and EPIP	1,478	Western Thomson, Green Signal Bio Pharma, Manchu Toughened Glass, Mabel Engineers	Heavy Engineering, Power, Chemicals.
Mahindra Origins, Puduvoiyal	700	Nissei, Yanmar	Private Industrial Park for engineering, food processing, automotive, logistics and aerospace developed with Sumitomo Corporation. Designated Japanese Industrial Township.
Thervoykandigai Indl. Park	1,127	Michelin, Grupo Antolin	Auto ancillary, Power, Heavy Engineering.

The major industrial corridors can be identified along as Irrugutukttai-Sriperumbudur, Ponneri-Periyapalam, Oragadam-Marai Malai Nagar & Cholavaram-Madhavaram-Ennore. The land rates in these corridors range between INR 2,960 to INR 27,200 per sqm. The rates mentioned are indicative and may vary on other parameters as well.

Other private Industrial Park include Indospace, Embassy & Hiranandani at multiple locations viz.: Oragadam, Sriperumbudur, PolivakKam, Puduvoiyal, etc. which have large area under development and existing occupiers

SL.	Project Name
AUTO & ANCILLARY	
1	Hyundai Motor
2	ASIS Auto Glass
3	Hwashin Automotive
4	Roki Minda
5	Renault – Nissan
6	NTN NEI Manufacturing
7	Nexteer Automotive
8	TVS Group
9	BMW
10	Hitachi Automotive Systems
11	Faurecia
12	Ashok Leyland
13	Yamaha
14	Royal Enfield
15	Valeo
16	Sekisui DLJM Molding
17	KOYAMA Precision Works
18	Royal Enfield
19	Motherson Sumi
20	Cosma International
21	JBM
22	Renault Nissan
23	Daimler
24	EICHER Motors
25	Apollo Tyres
26	Bridgestone
27	GKN Driveline
28	Valeo
29	Seoyon E-HWA Automotive
30	FCC Clutch
31	Mando Automotive
32	UNO Minda
33	Yorozu JBM Automotive
34	JK Tyres
35	Michelin
36	Grupo Antolin
37	Ford
38	Hanon Systems
39	JBM Auto Systems
40	Yazaki
41	CEAT
42	Visteon
43	Bonfiglioli Transmissions
44	TAFE
100	Delphi TVS
CHEMICAL & PETROCHEMICAL	
45	Asian Paints
46	Nippon Paint
47	Flosil – BET
48	Madras Petrochemical
49	Petro Araldite
50	Manali Petrochemical
51	CPCL Refinery
52	Petrofac
53	TechnipFMC
54	Flosil Oil & Gas
ENGINEERING	
55	Bekaert Industries
56	Takasago
57	EL Forge
58	Polyhose India Rubber
59	SCHWING Stetter
60	Tata Blue Scope
61	Venture Power Systems
62	Komatsu
63	Bosch Electrical Drives
64	Subros
65	POSCO – ICPC
66	Samsonite
67	CMR Toyota Aluminium
68	MEI Foundry
69	KONE Elevators
70	Mabel Engineers
71	Ingersoll Rand
ESDM	
72	Flex
73	Salcomp
74	Danfoss Industries
75	Nokia
76	Dell
77	Samsung
78	Foxconn
79	Sanmina
80	HCL
81	Samsung
82	Ericsson
FMCG	
83	Ajinomoto
84	Maruchan Ajinomoto
POWER & ENERGY	
93	Doosan Power Systems
94	Alstom T&D
95	Vestas
96	Siemens Gamesa
97	Toshiba JSW Power Systems



- Vishakhapatnam – Chennai Industrial Corridor
- Chennai – Bengaluru Industrial Corridor
- Chennai – Kurnool Economic Corridor
- Chennai – Madurai Economic Corridor

“We started our operations in Chennai in 2007 and invested INR 12.5 Bn in the operations of the plant in the past 12 years. Tamil Nadu has very good accessibility, logistics and infrastructure. It has the right mindset in the political environment with right policies, which are business friendly. And, the most important factor for any enterprise of our size is people, and we do find very skilled and qualified people here. So, the decision was clear for us to start our operations here.”

- Dr. Jochen Stallkamp
Managing Director, BMW

“Tamil Nadu is uniquely positioned because the state is amongst the highest manufacturing contribution to GDP of India at 21%. Further, the skill level in engineering and related industries is quite sublime in the state. Skill India Program is very close to our heart and we are investing heavily in skilling India.”

- Mr. Josh Foulger
Country Head and MD,
Foxconn International Holding

Tirupati-Chennai-Nellore

The Tri-city Industrial corridor

STATE SNAPSHOT



GSDP Growth Rate (FY18):
11.3%



HDI Rank (2018):
10th Rank



Logistic Performance Index
(2019) : **5th Rank**



4th Rank; INR 675 Bn
IEMs Implemented (Jan'14 – Dec'19)



No. of Factories in State (FY18):
16,296; 4th Rank



State's contribution to India's Exports:
6th Rank, 2.8% (FY19)

Note: Excludes Union Territories

Andhra Pradesh contributes:



>200
Pharmaceutical units



20% electronic
manufacturers in India



2nd largest source of **calcite**
& **limestone** in India



34% Export value of **marine**
exports from India

- **29 operational SEZs** across diversified sectors including textiles & apparels, food processing, pharma, multi-products, IT SEZs
- First state in India to have enacted the **Industrial Single Window Clearance**
- **Large coastline** of 974 km
- **Krishnapatnam Port** is one the fastest growing port of India, and is a node on the Chennai – Bengaluru Industrial Corridor

Scan QR code to access key weblinks



Department of
Industries, Government
of Andhra Pradesh



Andhra Pradesh
Industrial Infrastructure
Corporation (APIIC)



Andhra Pradesh Economic
Development Board
(APEDB)

Why Tri-city Hub?



Tri-City Hub (Tirupati-Chennai-Nellore)

- Tirupati-Chennai-Nellore is known as the tri-city industrial growth corridor
- This region falls under the influence zone of two industrial corridors – Chennai-Bengaluru Industrial Corridor (CBIC) & Vishakhapatnam-Chennai Industrial Corridor (VCIC)
- Tirupati is now emerging as an Electronics Cluster by developing Electronics Manufacturing Clusters right next to the newly developed airport terminal



Sri City

- Largest industrial park in South India, and is home to ~200 companies from 27 countries
- Attracted total investments of ~USD 4 billion
- Located on Andhra Pradesh - Tamil Nadu border. Thrives on Chennai's industrial ecosystem and port capacity



Naidupeta Cluster

- Proposed Naidupeta Cluster comprises of Naidupeta MPSEZ, IP-Naidupeta and IP-Attivaram
- It comes under the VCIC within the Yerpedu-Srikalahasti Node
- Naidupeta Cluster is where the state wants to attract Pharma Companies

SECTOR SNAPSHOT



ESDM

20 EMCs planned across the region. 3 EMCs in this clusters.



Amara Raja, TCL, Celkon, Karbonn, Voltas, Dixon Technologies, Exatron Services



Auto & Ancillaries

Isuzu Motors, Hero Motor Corp Alstom, TVS, TATA TRAD



Pharmaceutical

Synergy Remides, Ashwini Bio Pharma, Malladi Drugs & Pharmaceuticals, Artura Pharma, TIL Healthcare



FMCG

Sri City an emerging hub

Largest factory of PepsiCo in India at Sri City. Largest plant of Mondelez in Asia-Pacific region at Sri City

PepsiCo, Mondelez, Kellogg's, Colgate-Palmolive

Emerging Industrial Cluster of Andhra Pradesh



“Favourable business environment, fantastic facilities, infrastructure, access to great talented people, strong workforce, and most importantly the Government support of Andhra Pradesh, really led us to Sri City. That is the reason why we are trying to build something special here in SriCity.”

- Daniel Myers

Executive Vice President, Integrated Supply Chain, Mondelez International



Prominent industrial areas for greenfield and secondary transactions

Industrial Park	Total Area (Acres)	Major Occupiers	Remarks
Sri City (Includes Indospace Park: 30 acres)	7,500	Kellogg's, Isuzu, Mondelez, Pepsi, Alstom, Kobelco, Foxxconn, Danieli	It includes a multi-product SEZ, a DTZ, an FTWZ, a Logistics & Warehousing Cluster & an Electronics Manufacturing Cluster.
APIIC Industrial Park, Mambattu	380	Bharat Forge, Indus Coffee, Apache Footwear	Multi-product Industrial Park. Apache Footwear exports Adidas brand and employs 10,000+ people.
Sri Venkateswara Mobile & Electronics Hub (EMC-I), Tirupati	120	Celkon, Karbonn	India's first Electronics Manufacturing Cluster: Dedicated mobile handset & electronics manufacturing facility.
Electronic Manufacturing Cluster II, Tirupati	501	Dixon Technologies, Munoth Industries	Located near EMC-I & adjacent to Tirupati International Airport.
TCL Industrial Park, Tirupati	153	TCL and its components suppliers	World's third largest TV panel manufacturing Chinese firm TCL's first industrial plant in India.
Naidupeta MPSEZ	2,549	Greentech Industries, Prime Electricals, Hemair Systems, Aurobindo Pharma	Focus sectors: Automobile & Ancillary, Pharmaceuticals.
Naidupeta Industrial Park	1,244	Hindustan National Glass & Industries, SKI Carbon Black, Loyala Textiles, BASF India, Chemsynth Laboratories	Focus sectors: Textiles & Apparel, Pharmaceuticals, Chemicals.
Attivaram industrial Park	406	DRA Industries, Nithya Steels & Alloys	Focus sectors: Engineering & Machine Tools.

The major industrial clusters can be identified as Sri City, Tirupati and Naidupeta, and their adjoining areas. The land rates in these corridors range between INR 1,750 to INR 2,550 per sqm. The rates mentioned are indicative and may vary on other parameters as well.

Hyderabad

Fostering new innovations in
manufacturing sector



Hyderabad has emerged as the second silicon valley of India and is often referred to as Cyberabad. The region is a significant contributor to the IT, pharma, bio-tech, medical devices, aerospace, defence and ESDM sectors.

Scan QR code to access key weblinks



Commissionerate of
Industries



Industries & Commerce
Department



Telangana State
Industrial Infrastructure
Corporation (TSIIC)

Quli Qutb Shahi Tombs, Hyderabad

STATE SNAPSHOT



GSDP Growth Rate (FY18):
10.2%



HDI Rank (2018):
9th Rank



Logistic Performance Index
(2019) : **8th Rank**



12th Rank; INR 210 bn
IEMs Implemented (Jan'14 – Dec'19)



No. of Factories in State (FY 18):
15,263; 6th Rank



State's contribution to India's Exports
(FY19): **10th Rank, 6.4%**

Note: Excludes Union Territories

Telangana contributes:



50% of India's **bulk
drugs exports**



10% of global **generics
drugs** volume

Telangana State Industrial Project Approval and Self-Certification System (TS-iPASS)

Speedy processing of applications for various clearances for setting up of industries at a single point

- Definitive timeframe (ranging from 1 - 30 days)
- Penalties on government officers for any delays in granting approvals

Policy & Institutional Support – Proactive government

- Telangana ICT Policy, 2016
- Telangana Electronics Policy, 2016
- Telangana Innovation Policy, 2016
- Exclusive Data Center policy **(first in India)**
- IMAGE Policy, 2016 (Animation & Gaming)
- IoT Policy 2017
- Block-chain Policy (draft stage) **(first in India)**
- Drone Policy 2019 **(first in India)**
- of India, and is a node on the Chennai – Bengaluru Industrial Corridor

WHY HYDERABAD?

Central Location: A key to access large hinterland



1/3rd of global
vaccine production



2/5th of domestic
pharma production



16% of India's
software exports

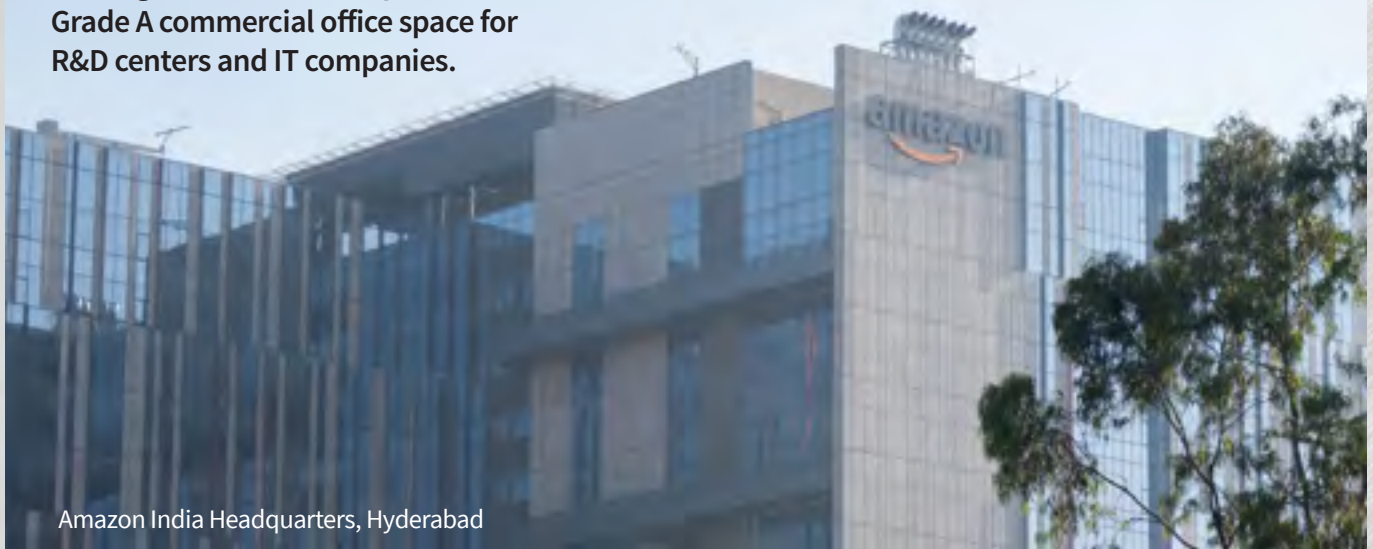


1/5th of national
defence production



53 IT SEZs
Largest cluster of IT SEZs
in the country

Hyderabad is giving stiff competition to Bengaluru in the absorption rate of Grade A commercial office space for R&D centers and IT companies.



Amazon India Headquarters, Hyderabad

Apple, Amazon, Facebook, Microsoft, Uber, Google (ongoing), Qualcomm (ongoing) – largest campus outside the US

Skilled labor pool:



18 ITIs (vocational training centers) in the Hyderabad Metropolitan



Region (HMR) and its vicinity.

Source: Dept. of Employment & Training, Govt. of Telangana

SECTOR SNAPSHOT

Emerging Sectors

 <p>Pharma & Lifesciences</p>  <p>Genome Valley (Genome Valley 2.0 planned)</p> <p>India's first and largest R&D and biotech cluster. Includes Life sciences focused incubators and multi-tenanted lab space</p>	 <p>Aerospace & Defence</p>  <p>Adibhatla Aerospace SEZ & GMR Aerospace Park</p> <p>India's only multi-product SEZ near an airport, along with domestic tariff area</p>	 <p>Hardware & ESDM</p>  <p>NIMZ & Fab City – E-City Dedicated manufacturing zones for ESDM</p>	 <p>IT & ITes</p>  <p>Established and expanding cluster around HITEC City and Gachibowli</p>	 <p>Innovation as a Driver</p>  <p>T-HUB : India's largest technology incubator. It is a first-of-its-kind PPP, incorporated in 2015: - 457 start-ups incubated till Jan 2019</p> <p>T-Works : India's largest prototyping center for ESDM hardware and mechanical start-ups; launched in 2019</p> <p>B-HUB (Biotech Hub): Announced in 2018, a scaled-up manufacturing facility for biopharma R&D companies, with a turnkey incubator</p>
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- **Pharma City (upcoming)** – World's largest integrated industrial cluster for pharmaceuticals
- **Bharat Biotech** – World's first company to file a Zika virus vaccine candidate patent

Niche focus: High-skill and superior technology manufacturing sectors:

- Drone technology
- Nano-sciences
- Artificial intelligence
- Self-driven car technology

Prominent industrial areas for greenfield and secondary transactions

Industrial Park	Total Area (Acers)	Major Occupiers	Remarks	
Kakatiya Mega Textile Park	1,190	Upcoming	Biggest textile park in India. Envisioned for an integrated value chain concept of "fibre to fabric" facility. Korean company Youngone is the anchor investor.	
Hyderabad Pharmacy	19,333	Upcoming	Proposed integrated development with objective is to set up the entire value chain of the pharmaceutical industry.	
EMC ECity	603	Upcoming	Greenfield electronics manufacturing cluster.	
EMC Maheshwaram	302			
IKP Knowledge Park	200	Laurus, USP, Du Pont, Adama, Escientia Biopharma, Sai Life Sciences, Biological E	Part of Genome Valley, India's first organized R&D cluster.	Ready-to-use multi-tenanted modular wet labs and land for customised R&D facilities.
MN Park	400	TCI-Tokyo Chemicals, Mylan, Novartis, GSK, Alembic		India's first Industrial Park to offer turn-key fully fitted lab & office spaces.
Medical Devices Park, Sultanpur	250	Apollo Hospitals, Cyient, Sahajanand Medical Technologies	Private Industrial Park for engineering, food processing, automotive, logistics and aerospace developed with Sumitomo Corporation.	
GMR Aerospace Park	5,500	Citron, Cyient, Safran	Automobiles, Electronics and Float Glass.	
Adibhatla Aerospace SEZ	337.8	TATA Advanced Systems Limited, JV units with Lockheed Martin, Sikorsky & GE	Focus greenfield industrial area for ESDM.	
Zaheerabad NIMZ**	12,635	Upcoming	Automotive & auto ancillary cluster.	

The major industrial clusters can be identified as Kompally – Medchal, Shamshabad, Cherlapally – Uppal – Nagole and Patancheru - Balanagar. The land rates in these corridors range between INR 3,700 to INR 19,800 per sqm. The rates mentioned are indicative and may vary on other parameters as well.

SL. ProjectName

LIFE SCIENCE ZONE

- 1 DuPont
- 2 Escientia Lifesciences
- 3 US Pharmacopeia
- 4 Adama
- 5 Laurus Labs r & D Center
- 6 Laxai Life Sciences
- 7 Sai Lifesciences
- 8 GSK Consumer Healthcare
- 9 B Hub

TRADITIONAL PHARMA ZONE

- 10 Hi tech Pharmaceuticals
- 11 Mylan Laboratories Ltd.
- 12 Transgene Biotek
- 13 Gland Pharma
- 14 Hyderabad Ammonia & Chemicals Pvt
- 15 Dr. Reddy's Laboratories
- 21 Aurobindo Pharma
- 22 Hyderabad Chemical Pvt Ltd
- 23 Daewoong Pharmaceutical
- 35 Lucid Laboratories Pvt Ltd.

AEROSPACE, DEFENCE AND ESDM ZONE

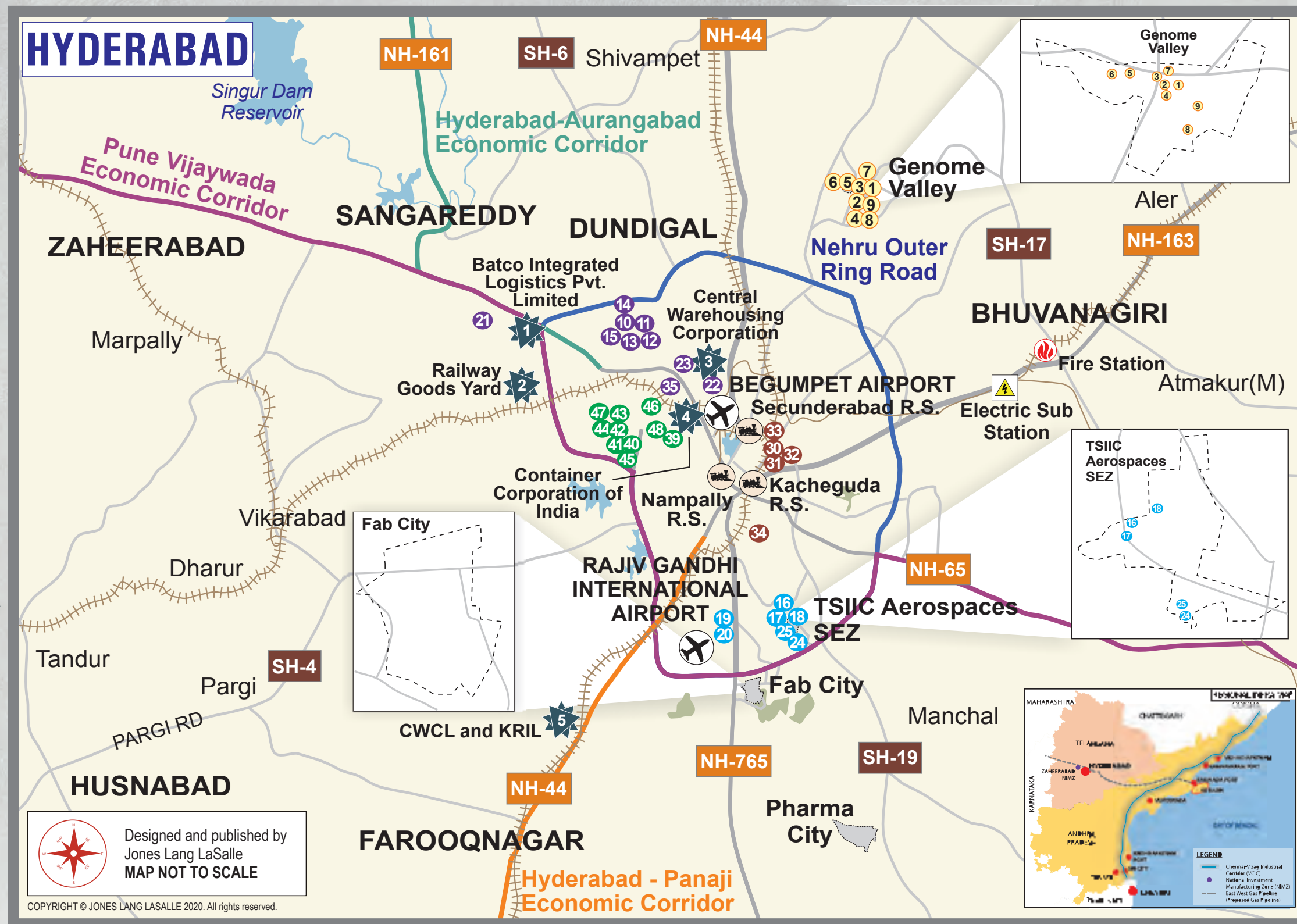
- 16 Tata Boeing Aerospace Ltd.
- 17 Tata Advanced Systems
- 18 Nucon Aerospace Pvt Ltd.
- 19 Tata Teleservices
- 20 ESDM (C-DAC)
- 24 Tata Lockheed Martin Aerostructures Ltd.
- 25 Tata Sikorsky Aerospace Limited

ICD & CFS

- 26 Central Warehousing Corporation
- 27 Container Corporation of India
- 28 CWCL and KRIL
- 29 Batco Integrated Logistics Pvt. Ltd.
- 38 Railway Goods Yard

KNOWLEDGE ZONE

- 30 CSIR – Indian Institute of Chemical Technology
- 31 CSIR – National Geophysical Research Insitute
- 32 CSIR – Centre for Cellular & Molecular Biology
- 33 National Institute of Nutrition
- 34 Central Research Institute for Dryland Agriculture



- Nehru Outer Ring Road
- Pune Vijayawada Economic Corridor
- Hyderabad – Aurangabad Economic Corridor
- Hyderabad – Panaji Economic Corridor

“ Bharat Biotech is the youngest Indian vaccine manufacturer of multiple human vaccines. Hyderabad is close to the centre of India & easily accessible. The city has eminent scientific institutions such as Center for Cellular & Molecular Biology, Indian Institute of Chemical Technology, Jawaharlal Nehru Technological University, Osmania University, Central University of Hyderabad, three other vaccine manufacturing companies, Hub for Bulk Drugs & highly ranked pharmaceutical formulation & filling companies & cosmopolitan capitol city.”

— Dr. G.V.J.A. Harshavardhan,
Director, Bharat Biotech International Ltd.

“ Hyderabad continues to be an attractive location when looking at several key criteria including access to a highly educated science and digital talent pool with extensive pharmaceutical experience, a mature global services delivery centre and cost effectiveness. Hyderabad has a strong innovation ecosystem with T-Hub being India's largest start-up incubator. The city is the bedrock for technology driven firms through a fast modernising infrastructure and availability of talent.”

— Sanjay Murdeshwar, Country President, Novartis

Ahmedabad

India's Emerging Auto Hub



Ahmedabad – India's first heritage city declared by UNESCO – has been an industrial base for sectors such as chemicals, textiles, pharmaceuticals and agro & food processing industries. Sanand – Mandal – Becharaji industrial belt is fast emerging as a major automotive manufacturing cluster, driven by investments by Japanese companies.

Scan QR code to access key weblinks



Gujarat Industries
Department



Gujarat Industrial Development
Corporation (GIDC)



Industrial Extension
Bureau (iNDEXTb)

Rani ki Vav - 11th Century Stepwell, Near Ahmedabad

STATE SNAPSHOT



GSDP Growth (FY18):

11.2%



No. of Factories in State (FY 18):

26,586; 2nd Rank



Logistic Performance Index

(2019) : **1st Rank**



1st Rank INR 16,156 Bn

IEMs Implemented (Jan'14 - Dec'19)



HDI Rank (2018):

8th Rank

Note: Excludes Union Territories



State's contribution to India's

Exports (FY 19): **17.2%**

Gujarat contributes:



30% of processed **food & dairy** exports from India



40% of **chemicals** exports



35% of **cotton** produced in India (Largest Producer)



62% of India's **petrochemical** production



65% of **demin** fabric production in the country



25% of country's textile **manufacturing** output



Business Opportunities

36% of 1,500 km Western Dedicated Freight Corridor (WDFC) is through Gujarat (565 km) with 6 nodes including Ahmedabad – Dholera node



State with longest coastline: 1,600 kms



1st Rank in cargo throughput amongst all Indian ports



Highest number of operational ports and commercial cargo ports: 44, handling ~2/5th of total port cargo in India



Private Industrial Park Development

Scheme, 2015: **First state to**

promote & encourage private industrial parks development through incentives

WHY AHMEDABAD?

Ahmedabad contributes:



6% market share of Indian **automobile** sector



10% of India's **pharmaceuticals** market



The **largest city of Gujarat** (6.4 mn population) has an estimated **GDP** of **USD 68 billion**



The city constitutes **21.5% of total industries** in the state and employees **18% of workers** of the state



Headquarters of big corporates such as Zydus- Cadilla, Torrent Pharmaceuticals, Nirma Group of Industries, Adani Group, Arvind and Dishman Pharmaceuticals & Chemicals

Large-scale Greenfield industrial cities



Dholera Special Investment Region (DSIR):

- Greenfield Industrial City - 100 km from Ahmedabad
- Largest node on the Delhi – Mumbai Industrial Corridor (DMIC) - 920 sq.km.
- Focus Sectors: Defence and Aerospace, Automotive, Capital Goods



Mandal Becharaji Special Investment Region (MBSIR):

- Expected to emerge as India's largest auto-hub once all expansion plans are completed
- Currently over 0.5 million cars produced every year
- Suzuki Motors and Honda Motorcycle & Scooter are the main Auto OEMs



Gujarat International Finance Tec – City (GIFT)

- India's only International Financial Services Center (IFSC) trying to compete with financial centres like Singapore, Hong Kong and Dubai
- India's first operational smart city with 886 acres of land with 62 Mn. Sq.ft. of built up area
- Strategically located near Ahmedabad Airport (12 km), Gandhinagar (12 km) & Ahmedabad (25 km)

SECTOR SNAPSHOT

Emerging Sectors



Auto & Ancillaries

Well-developed auto clusters – Sanand, Mandal-Becharaji with major players like **Tata Motors, Suzuki Motors, Honda Motorcycle & Scooter, etc.**



Japanese Industrial Township, Japanese Industrial Zone & Auto Value Chain Park



Pharma & Lifesciences

Products: APIs, Formulations, Biological Products, Contract Manufacturing



1/3rd of state's pharma units across 1500 ha



Textiles & Apparel

3 Textile SEZs in Ahmedabad with investment of **~INR 5 billion**



ATIRA – India's largest textile research & first textile testing lab



Capital Goods: Hub for Textile machinery, plastic moulding machinery



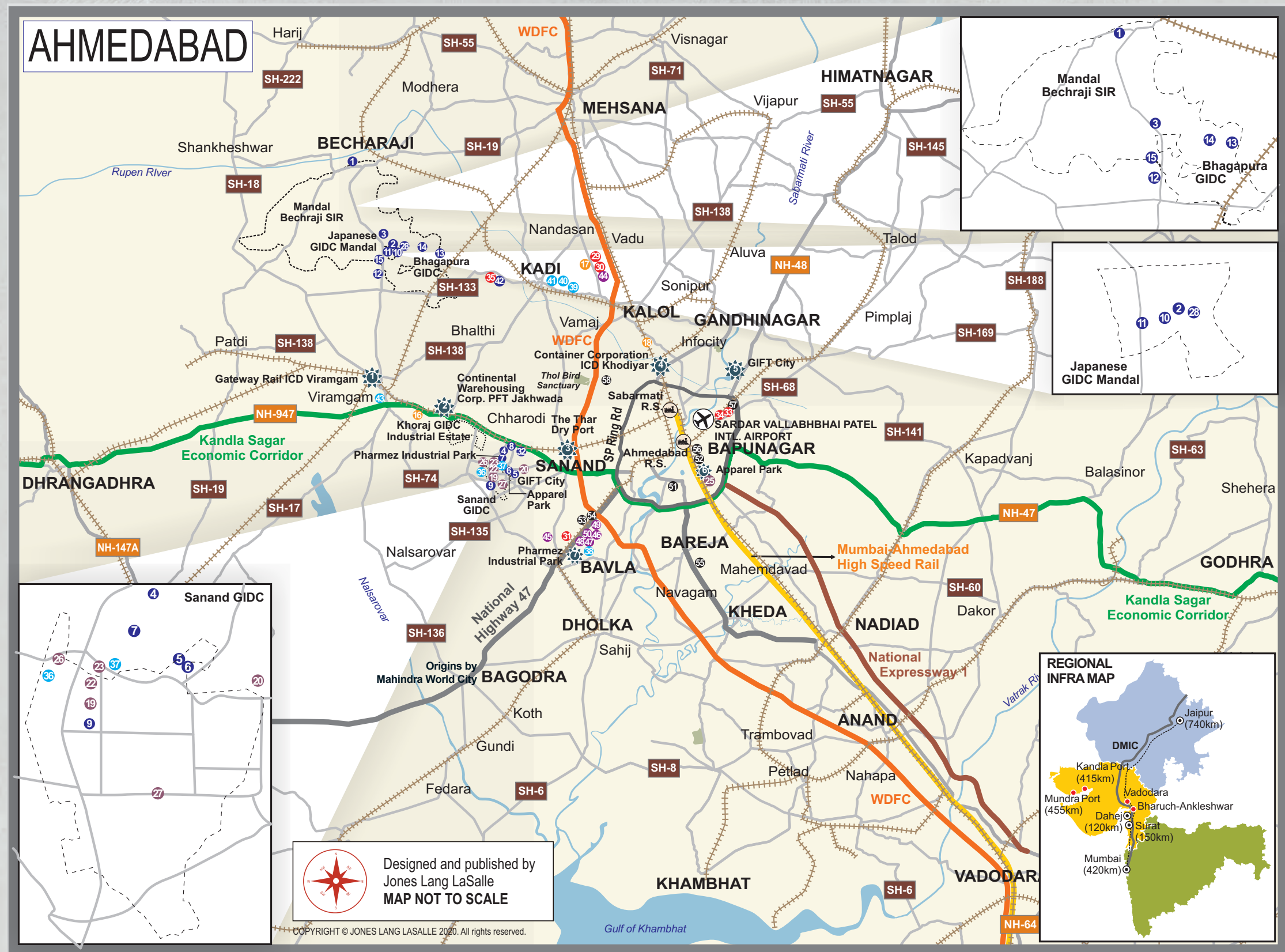
ESDM: Ahmedabad has been notified as an EMC (Electronics Manufacturing Cluster)

Prominent industrial areas for greenfield and secondary transactions

Industrial Park	Total Area (Acres)	Major Occupiers	Remarks
GIDC Sanand Industrial Estate	5,080	CIL Nova Petrochemicals, Tata Motors, Ford, Bosch, Magna, Valeo, Ascent Yarns	Focus sectors: Engineering, Automobiles & ancillary units, Engineering plastics, Semiconductors, Electronics, Medical Devices.
Japanese Industrial Township, Sanand III (Khoraj)	1,750	Upcoming	An ecosystem of core manufacturing, allied industries & supporting facilities for Auto & ancillaries, Engineering & Pharmaceuticals sectors.
Mandal – Becharaji SIR	25,205	Suzuki Motors, Honda Motorcycle & Scooter	Completed Suzuki Motors has already operationalized two car manufacturing plants with 0.5 Mn. capacity. Honda has established world's largest scooter plant with 1.2 Mn. annual capacity.
Japanese Industrial Estate, Mandal	304	Technotrends Autopark, Topre Corp, Murakami Corp, Roki Minda Company	Gujarat's first country specific industrial estate delineated for Japanese companies focussing on Auto & ancillaries, & Engineering sectors with options of ready built facilities for immediate operations.
Dholera SIR	22,734	Upcoming	Greenfield Industrial City with focus sectors in Defense, aviation, general manufacturing, etc.
Pharmez (Zydus) Industrial Park	270	Thermo Fisher Scientific, Intas Pharmaceuticals, Cadila Pharmaceuticals	Gujarat's first pharmaceutical SEZ.
Ahmedabad Apparel Park	94	Artex Apparel, Tarasafe International	Focused at value addition to textile manufacturing. To be converted into a product specific SEZ later.
Vraj Integrated Textile Park	125	Upcoming	Greenfield Textile SEZ with proposed further expansion.
Origins by Mahindra World City	340	Upcoming	Plug & play infrastructure with focus on Engineering, Automotive, Pharmaceutical & Medical Device, Plastic & Packaging, Textile and Food Processing etc.

The major industrial corridors can be identified along Changodar – Bhayala road, Aslali – Kheda and Sanand – Becharaji. The land rates in these corridors range between INR 2,400 to INR 8,650 per sqm. The rates mentioned are indicative and may vary on other parameters as well.

SL No.	ProjectName
AUTO & ANCILLARY	
1	Suzuki Motor Gujarat
2	Roki Minda
3	Honda Motorcycle and Scooter India
4	Tata Motors
5	Magna Automotive India
6	Valeo India
7	Ford India
8	Faurecia Automotive Seating
9	Motherson Automotive
10	Munjal Kiriu Industries
11	JBM Group
12	Varroc Polymers
13	Mindarika
14	Nagata Auto
15	Honda Four Wheeler
28	Topre India
32	Bosch Rexroth India
42	Asahi India Glass
CHEMICAL	
16	Hindustan Gum & Chemicals
17	Ambuja Intermediates
18	IFFCO
FMCG	
19	INBISCO India
20	Hindustan Coca-Cola Beverages
22	Nivea India
23	Colgate Palmolive India
25	Nirma
26	Nestle India
27	Unicharm India
HEAVY ENGINEERING	
29	Sandvik Asia
30	Apollo Inffratech
31	Laxcon Steels
33	Dresser Rand India
34	Ingersoll Rand
35	Haitian Machinery
OTHERS	
36	GE Power Systems India
37	Hitachi Hi-Rel Power Electronics
38	Vestas Wind
39	Johnsons Controls - Hitachi
40	Somany Ceramics
41	CERA Sanitaryware
43	Cairn India
PHARMA & LIFESCIENCES	
44	Torrent Pharmaceuticals
45	Dishman Pharmaceuticals
46	Claris Lifesciences
47	Thermo Fisher Scientific India
48	Intas Pharmaceuticals
49	Zydus Cadila Healthcare
50	Alidac Pharmaceuticals
TEXTILE & APPAREL	
51	Aarvee Denims & Export
52	Artez Apparels
53	Ascent Yarns
54	CIL NOVA Petrochemicals
55	Nova Textile
56	Tarasafe International
57	Reliance Industries
58	Arvind Mills
ICD/ CFS	
1	Gateway Rail ICD Viramgam
2	Continental Warehousing Corp. PFT Jakhwada
3	The Thar Dry Port
4	Container Corporation ICD Khodiyar
5	GIFT City
6	Apparel Park
7	Pharmez Industrial Park



Ahmedabad offers a right mix of socio-economic and political environment and has the infrastructure and skill base to pull investors, especially Sanand which has emerged with an equally good ecosystem for FMCG goods production. Recognising this very potential, we have invested to build this state-of-the-art facility at Sanand and continue to be part of the city's industrial growth story

- Marico India

Colgate India is extremely proud to be a part of 'Vibrant Gujarat' with its infrastructure facilities, skilled labour and the policies with respect to ease of doing business. We have made a large investment in this vibrant state by setting up a best in-class toothpaste manufacturing plant in the year 2014 at Sanand facility, not only for Indian consumers but also for Exports.

- Colgate India

Vadodara

Bharuch-Ankleshwar Cluster

Country's Power Engineering
and Chemicals Cluster



A large, ornate, light-colored stone building with multiple domes and arched windows, set against a clear blue sky. The architecture is highly detailed with carvings and smaller domes on the roof.

Vadodara is Gujarat's third largest city with an urban population of 1.8 million. The city is also an educational hub and has a vibrant manufacturing landscape spanning across sectors like **Power Transmission & Machine tools, Pharmaceuticals, Chemicals, Biotechnology, Engineering, Auto and Defence.**

Scan QR code to access key weblinks



Gujarat Industries &
Mines Department



Gujarat Industrial
Development Corporation
(GIDC)



Industrial Extension
Bureau
(INDEX Tb)

Laxmi Vilas Palace, Vadodara

STATE SNAPSHOT



GSDP Growth
(FY 18): **11.2%**



1st Rank; INR 16,156 Bn IEMs
Implemented (Jan'14 – Dec'19)



Logistic Performance
Index (2019): **1st Rank**



No. of **Factories** in State
(FY 18): **26,586; 2nd Rank**



HDI Rank, 2018:
8th Rank



State's contribution to India's
Exports (FY 19): **17.2%**

Note: Excludes Union Territories

GUJARAT CONTRIBUTES:



30% of processed **food & dairy exports** from India



51% of licensed **medical device** companies in India



35% of **cotton produced** in India
(Largest Producer)



62% of India's
petrochemical production

BUSINESS OPPORTUNITIES



36% of 1,500 km Western Dedicated Freight Corridor (WDFC) is through Gujarat
(565 km) with 6 nodes including **Vadodara - Ankleshwar node**

WHY VADODARA

Vadodara contributes



35% of India's **power transmission & distribution equipment** manufacturers



28% of state's **manufacturing** sector



Home to Indian Oil Corporation's second largest refinery in India: presently undergoing expansion to increase capacity to 18 MMTPA to become India's largest refinery (by 2023)



India's first railway university - **National Rail & Transportation Institute** (NRTI) with multi-disciplinary techno-commercial curriculum



Home to large scale public sector

enterprises such as Gujarat Alkalies & Chemicals Limited (GACL), Gujarat State Fertilizers and Chemicals (GSFC), Gujarat Industries Power Company Ltd. (GIPCL), Indian Oil Corporation (IOCL), Oil and Natural Gas Corporation (ONGC).

IOCL Plant, Vadodra



Halol-Savli SIR

- Halol-Savli Special Investment Region (SIR) with an area of 123 sq.km.
- **Potential Sectors:** Engineering, Auto & Ancillary, Engineering Plastics and Electrical & Electronics Industries
- Existing major units in the region: CEAT, HNG, Kemrock, Sun Pharma, DuPont, Bombardier















Dahej - Petroleum, Chemicals and Petrochemicals Investment Region (PCPIR)

- India's most active and successful PCPIR zone
- Specifically delineated investment region of 450 sq.km. area focusing on Petroleum, Chemicals & Petrochemical Industries
- Dahej Port is connected to Vadodara (108 km) via 4-lane expressway & includes a liquid chemical, LNG, a Dry Bulk Cargo Terminal and a Ro-Ro service
- OPaL's unit at Dahej is the largest petrochemical plant in India, developed at an investment of USD 4.6 Billion

SECTOR SNAPSHOT

Emerging Sectors

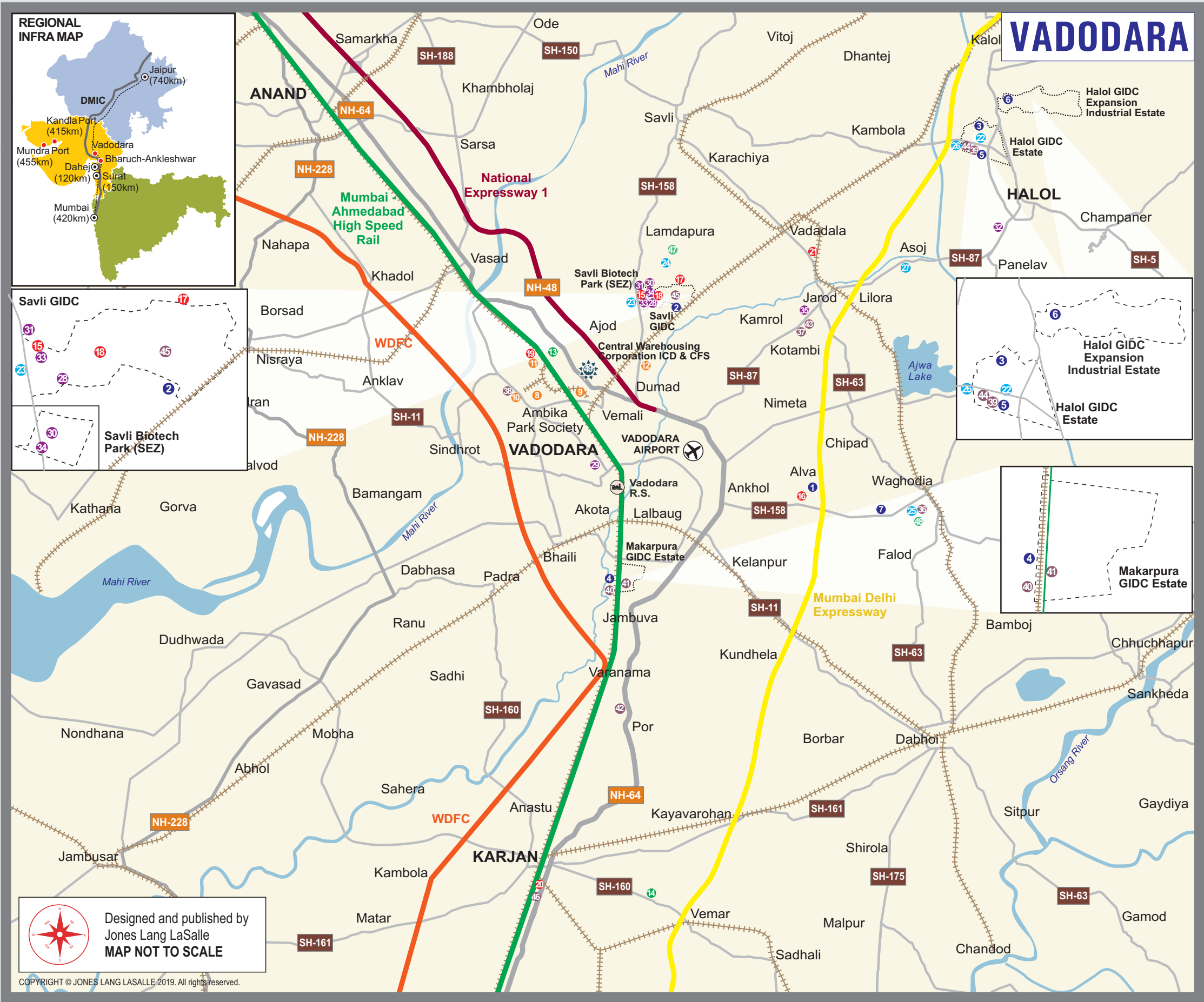
 Chemical & Petrochemical <p>Large petrochemical & chemical fertilizer complex, petroleum refineries, Chloralkali plants, etc.</p>  <p>GACL, GSFC, Reliance, GIPCL, IOCL, BASF, Nandesari GIDC, ONGC, Dahej PCPIR</p>	 Heavy Engineering <p>Downstream industries for power, rail - related infrastructure & auto industry</p>  <p>Oriental Manufacturers, Jindal Rail Infra, Mahindra Accelo, Trans-Rail Lighting</p>	 Power Transmission & Energy <p>Home to an estimated 800 ancillary units</p>  <p>GE Power, ABB, Aspen SEZ (formerly Suzlon Energy Ltd.), TBEA, Schneider Electric, Siemens Gamesa, DuPont</p>	 Pharma & Biotech <p>2nd largest hub for Pharma in Gujarat after Ahmedabad.</p>  <p>Alembic Pharma, Sun Pharma, Elysium Pharma, BDR Pharma, Brooks Laboratories, Savli Biotech Park</p>	 Auto & Ancillary <p>One of the major & fast-growing hub for auto & ancillaries in Gujarat</p>  <p>MG Motors, Hero Moto Corp, Apollo Tyres, Ceat Tyres, Philips, Crompton Greaves, JCB</p>	 Defence <p>Emerging support base for defence sector</p>  <p>L&T Defence Manufacturing (Ranoli), Vizebh Composite</p>
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Prominent industrial areas for greenfield and secondary transactions

Industrial Park		Total Area (Acres)	Major Occupiers	Remarks
Dahej PCPIR	Saykha Industrial Estate	5,078	Upcoming	Focus sectors are: Chemicals, engineering & textiles.
	Dahej Industrial Estate – Phase 1, 2 & 3	22,500 (9,410 + 9,440 + 3,650)	Reliance, Petronet LNG, Thermax, OPAL, Sterling, Hitachi Zosen, BASF	Major concentration of chemical & petrochemical companies as it is part of Dahej PCPIR.
	Payal Industrial Park (Arete)	5,000	Upcoming	Part of Dahej PCPIR near Bharuch, and is the largest privately held business park in India.
Savli Industrial Estate		770	Bombardier Transportation, Sheffield Technoplast, Schaeffler India	Focus sectors are: biotechnology, agri-biotech, engineering, plastics, export-oriented unitsw.
Savli Biotech Park (SEZ)		700	Zytext Biotech, Aristo Biotech & Lifesciences, Centurion Laboratories	Endeavour to address the biotech industry's need for specialized infrastructure and encourage new biotech enterprises.
Halol Industrial Estate		1483	MG Motors, Siemens Gamesa, CEAT, Windar Renewables	Focus sectors: Engineering, Automobiles & ancillary units, Electronics.
Makarpura Industrial Estate		1,200	GE Renewable, Bombardier Transportation	One of the oldest industrial area in the city and located along NH 48.
Bharuch Industrial Estate		211	GNFC, Reliance Chemicals, Pepsico,	Formidable industrial base in sectors like chemicals & petrochemicals, textiles, drugs & pharmaceuticals.
Ankleshwar Industrial Estate		3985	BASF, Rallis India, Zydus Cadila, Apex Health Care, Wockhardt, ONGC	Largest GIDC estate with presence of 2000+ industries including ~1500 chemical industries.

The major industrial clusters can be identified as Savli, Makarpura, Halol, Dahej, Bharuch and Ankleshwar. The land rates in these corridors range between INR 1,600 to INR 6,400 per sqm. The rates mentioned are indicative and may vary on other parameters as well.

Sr.	Project Name
AUTO & ANCILLARY	
1	BANCO Products
2	Bombardier Transportation, Savli
3	CEAT
4	Bombardier Transportation
5	MG Motor India
6	Hero Motor Corp.
7	Apollo Tyres
Chemical & Petrochemical	
8	IOCL Gujarat Refinery
9	Gujarat State Fertilizer & Chemicals Ltd.
10	Reliance Manufacturing
11	Gujarat Alkalies & Chemicals Ltd. (GACL)
12	IOCL, Dumad
Defence	
13	L&T Manufacturing Facility, Ranoli
14	Vizebh Composites
HEAVY ENGG. & MACHINE TOOLS	
15	Netafim Irrigation India
16	SE Forge
17	Schaeffler India
18	Elecon Hydraulic
19	Oriental Manufacturing
20	Jindal Rail Infra
21	Trans-Rail Lighting
Others	
22	TOTO India Industries
23	Sheffield Technoplast
24	FlintGroup India
25	Voltas
26	SISE Cam Flat Glass
27	Kemrock Industries & Exports
Pharma & Biotech	
28	Aristo Biotech & Life Sciences
29	Alembic Research Center
30	Marsha Pharmaceuticals
31	Centurion Laboratories
32	Sun Pharma
33	Savli Bio-Incubator
34	Zytex Biotech
35	Alembic Pharmaceuticals
Power & Energy	
36	TSI Power
37	GE T&D India
38	GIPCL
39	Windar Renewables
40	GE Renewables
41	ABB India
42	Suzlon Energy
43	Schneider Electric
44	Siemens Gamesa Renewable
45	DuPont
46	TBEA
Industrial Park	
47	Shiv Industrial Infrastructure Park
48	Siddhi Industrial Infrastructure Park
ICD & CFS	
49	Central Warehousing Corporation ICD & CFS



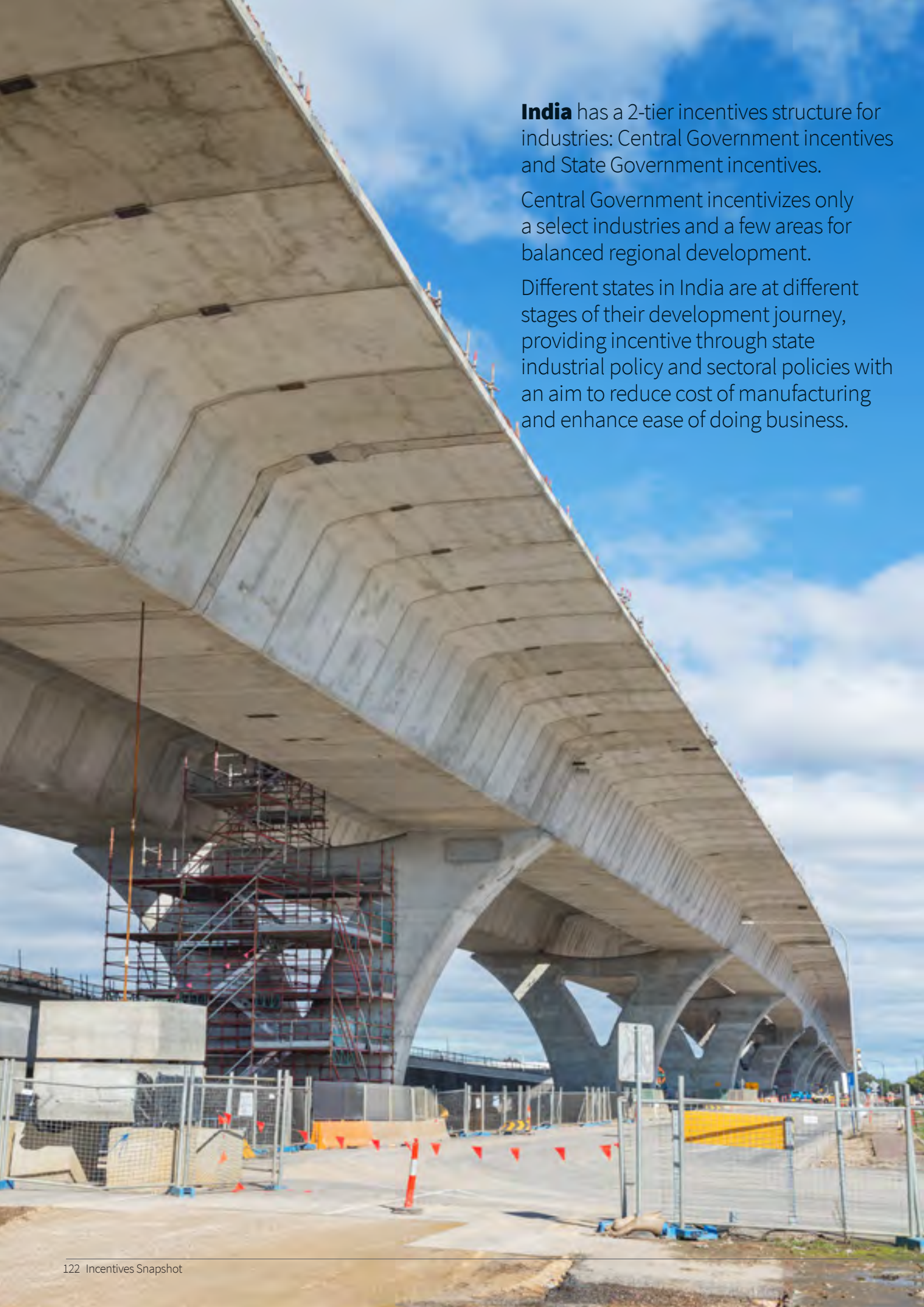
Ajanta Pharma has come to Gujarat attracted by the conducive business climate. To meet the requirements of the USA market, and also WHO-approved programs and emerging markets, Ajanta Pharma has set up a plant at Dahej in Gujarat for manufacturing tablets, capsules, powders & jellies.

- Yogesh Agrawal,
Managing Director,
Ajanta Pharma Limited

Incentives Snapshot

Structure and Types





India has a 2-tier incentives structure for industries: Central Government incentives and State Government incentives.

Central Government incentivizes only a select industries and a few areas for balanced regional development.

Different states in India are at different stages of their development journey, providing incentive through state industrial policy and sectoral policies with an aim to reduce cost of manufacturing and enhance ease of doing business.

Incentive Structures in India

Activity/Category	Central Government	State Governments
 Manufacturing Sector	Income Tax Act 1961 <ul style="list-style-type: none"> 4 year window of lower Corporate Income Tax (17.16%) for new manufacturing units till 31 March 2023 	State Industrial Policies and Specific Sectoral Policies <ul style="list-style-type: none"> Drafted by Industries & Commerce Department of States, valid for a period of 5 years Incentivises capital expenditure and reduces operating expenditure Quantum varies by investment size, employment generation, location
	Special Economic Zones <ul style="list-style-type: none"> Deemed foreign territory. Direct Tax, Indirect Tax and non-fiscal benefits Units must be Net Foreign Exchange earner over a period of 5 years 	
	Custom-Bonded Manufacturing <ul style="list-style-type: none"> Deferred duty on capital goods and raw materials 	
 Services Sector	Income Tax Act 1961 <ul style="list-style-type: none"> Income tax reduced to 25.17% for new services companies 	State Industrial Policies and Specific Sectoral Policies <p>Incentives for services sector are less than manufacturing.</p> <p>Some states offer incentives to IT, ITES</p>
	Special Economic Zones <ul style="list-style-type: none"> IT/ITES sector is the biggest beneficiary of SEZ policy in India 	
 Start-ups	Income Tax Act 1961 <ul style="list-style-type: none"> 100% deduction of profits and gains derived from any 3 consecutive years out of 7 years from year of incorporation of 'eligible start-up' Preference in public procurement 	State Start-up Policies <p>Almost all states in India have start-up policies.</p> <p>Incentives such as reimbursement of rentals, patent cost reimbursement, seed grant, preferential procurement, support in quality testing, etc.</p>
Foreign Trade	Central Government	State Governments
 Imports	<p>Import Policy is published by Directorate General of Foreign Trade (DGFT)</p> <ul style="list-style-type: none"> Imports of finished goods is not incentivised Import duty for inputs/raw material is adjusted from time-to-time as per industry requirements 	<ul style="list-style-type: none"> Import is a central government subject as per Indian Constitution
	Foreign Trade Policy Schemes <ul style="list-style-type: none"> Project Import Scheme: Relaxes duties for import of specific capital goods Advanced Authorization Scheme: Exempts duties for import of inputs for export consignments 	
 Exports	<p>Export Policy is published by DGFT. Exports of most commodities/goods and services is encouraged.</p>	<ul style="list-style-type: none"> Export is a central government subject as per Indian Constitution Some states incentivise export-oriented units by offering specific subsidies (E.g. Maharashtra, Madhya Pradesh)
	Foreign Trade Policy Schemes <ul style="list-style-type: none"> RoDTEP: Scheme for remission of duties or taxes on export product 	

Central Government incentivizes businesses through provisions in Income Tax Act 1961 and through Foreign Trade Policy; whereas, States offer capital subsidy, exemption/refund of local taxes, employment generation subsidy, interest subsidy, etc.

CORPORATE INCOME TAX



Reduced to **25.17%** from **34.94%** in September 2019, for existing units not availing incentives under Income Tax Act 1961.



Units in **SEZ** or companies availing incentives (deduction, depreciation, capex-linked incentives) will continue to pay corporate income tax at base rate of **25% & 30%**.



A 4-year window for new manufacturing units incorporated after 1 Oct 2019 and operational before 31 March 2023 to avail benefit of **17.16%** Corporate Income Tax.



LOCATION-SPECIFIC



Additional deduction @15% on new machinery installed in notified backward areas of Andhra Pradesh, Bihar, Telangana & West Bengal

ACTIVITY-BASED



150% deduction on in-house Research & Development till **31 March 2020** (100% thereafter)

INDUSTRY-SPECIFIC



Schemes to promote **Capex** in a sector by line ministries of central government. Not as elaborate as offered by States.



SPECIAL ECONOMIC ZONES (SEZ)

- Governed by SEZ Act 2005 and SEZ Rules
- SEZ could be sector-specific or multi-product
- SEZ must be Net Foreign Exchange Earners. Allowed to sell to domestic market after payment of customs duty (BCD+SWS+IGST)
- Direct Tax Benefits: Corporate Income Tax exemption on export profits (Expires: 31 Mar 2020)
 - 100% for the first 5 years of operations
 - 50% for 5 years thereafter
 - 50% of ploughed back profits for another 5 years
 - Minimum Alternate Tax (MAT) must be paid by SEZ units. In September 2019, MAT reduced to 15% from 18.5% earlier
 - Dividend Distribution Tax abolished in Feb 2020
- Indirect Tax Benefits
 - Exemption from Custom Duty on Capital Goods, Raw Material and other Fixtures
 - Exemption from GST
 - Exemption from Stamp duty and Registration fees on lease of land / mortgage deed.
 - Exemption from Electricity Duty
- Non-Fiscal Benefits
 - Single Window Clearance



DOMESTIC TARIFF AREA (DTA)

- Industrial zones that are non-SEZ, non-FTWZ or Non-Custom-Bonded are termed as DTA
- Companies targeting domestic market should located units in DTA. Such parks are captured in cluster profiles in the report.
- DTA units can also export and avail benefits under Foreign Trade Policy
- Sale from DTA to SEZ is classified as deemed exports



FREE TRADE WAREHOUSING ZONE (FTWZ)

- Governed by SEZ Act 2005 and SEZ Rules. Predominately for EXIM trade & storage
- Duty deferment on imported goods
- Permits trade transactions in foreign currency
- Trading hub for Indian/Overseas entity without any registration
- Trade compliances post cargo arrivals
- Faster custom clearances
- Storage, Packaging, labelling permitted

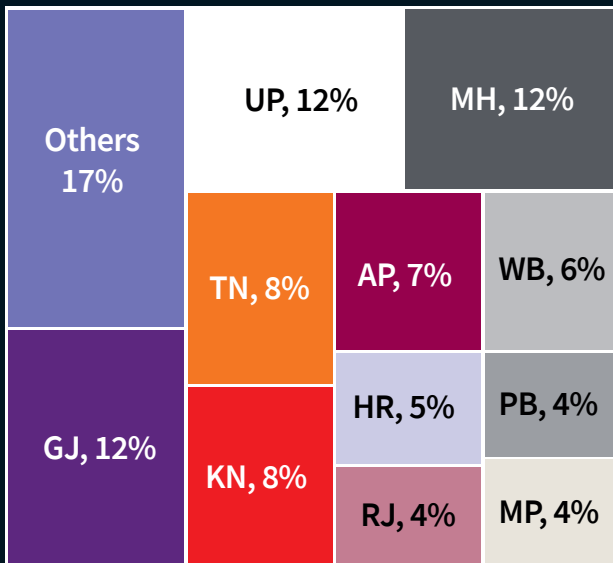


CUSTOM-BONDED MANUFACTURING

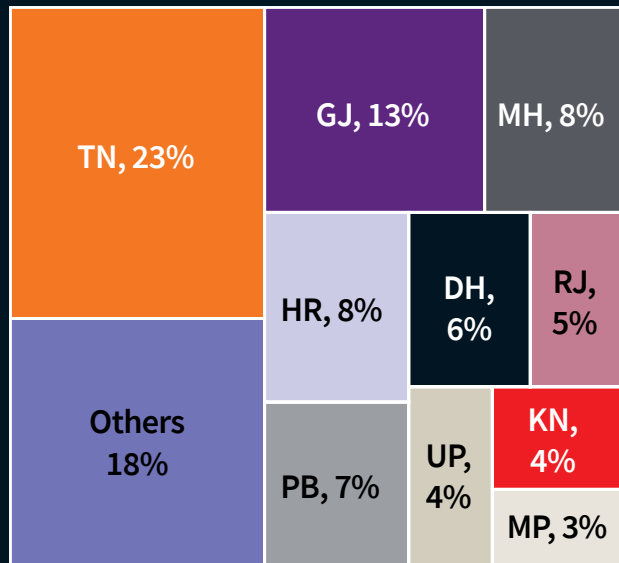
- Governed by Section 65 of Customs Act, 1962
- Circular 38/2018 dated 18 October 2018 elucidates manufacturing in a bonded warehouse
- Deferred customs duty on capital goods till clearance
- Deferred customs duty on imported inputs and raw materials
 - On DTA clearance, customs duty to be paid on imported raw materials used for manufacturing
 - No duties if finished goods are exported
- Any property can be converted to bonded warehouse after customs approval
- Unlike SEZ, no requirement to be Net Foreign Exchange Earner
 - 100% output can be sold in DTA

Major States Contributing ~80% of Industry Output

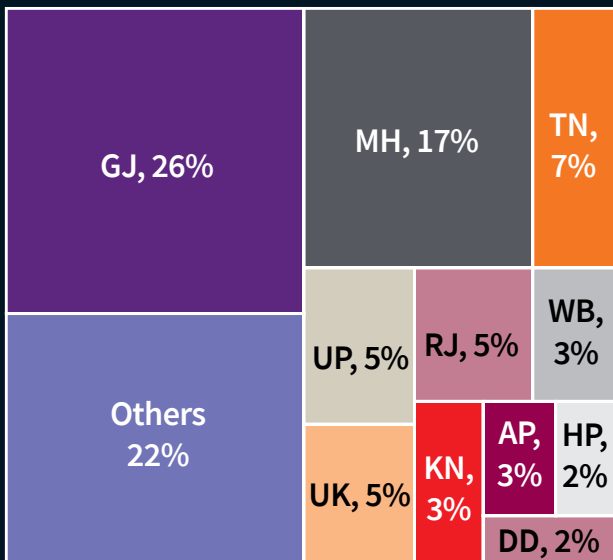
FOOD PRODUCTS & BEVERAGES



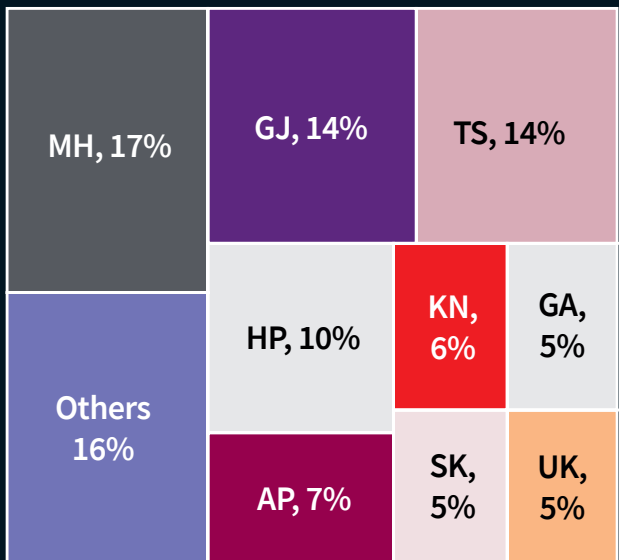
TEXTILES, APPAREL & LEATHER



CHEMICALS, RUBBER & PLASTIC PRODUCTS



PHARMACEUTICALS, MEDICINAL CHEMICALS



Industrialization Barometer

Top 5 States by GVA (2016-17):

Maharashtra, Tamil Nadu, Gujarat, Uttar Pradesh, Karnataka

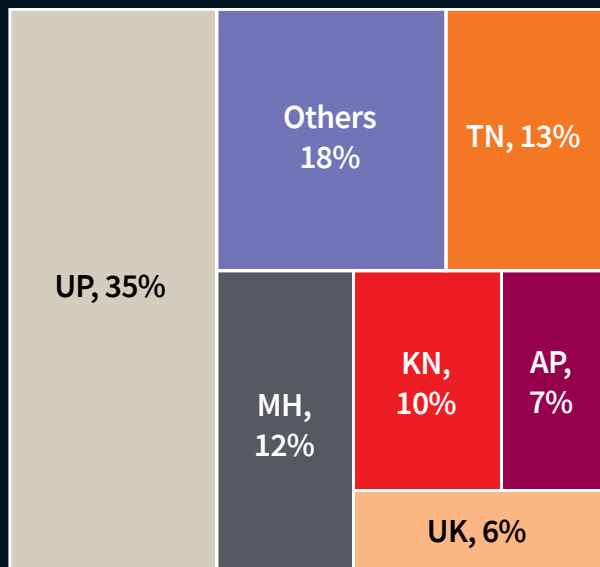
- 52% of total GSDP
- 51% of all factories in India
- 57% of aggregate GVA
- Mature policy framework
- Established manufacturing clusters: strong industrial ecosystem and vendor base

Emerging Manufacturing Hotspots:

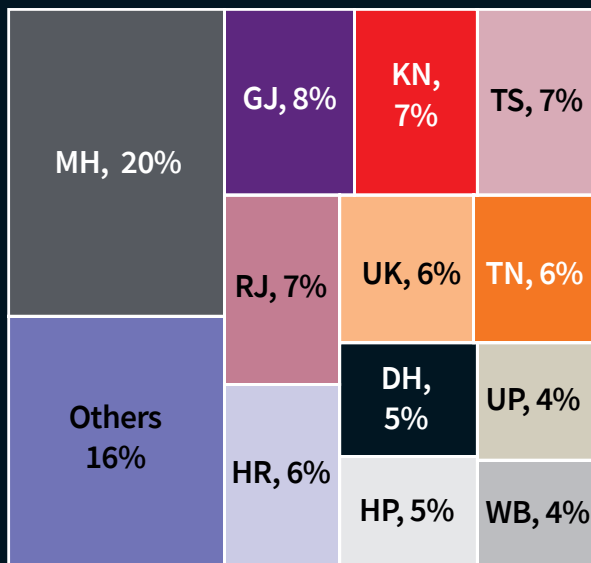
Haryana, Uttarakhand, Rajasthan, Telangana, Madhya Pradesh, West Bengal, Andhra Pradesh, Himachal Pradesh, Odisha, Punjab, Jharkhand

- 36% of total GSDP
- 37% of all factories in India
- 33% of aggregate GVA
- Attracting manufacturing investments through proactive policies and attractive incentives
- Undertaking industrial infrastructure upgradations

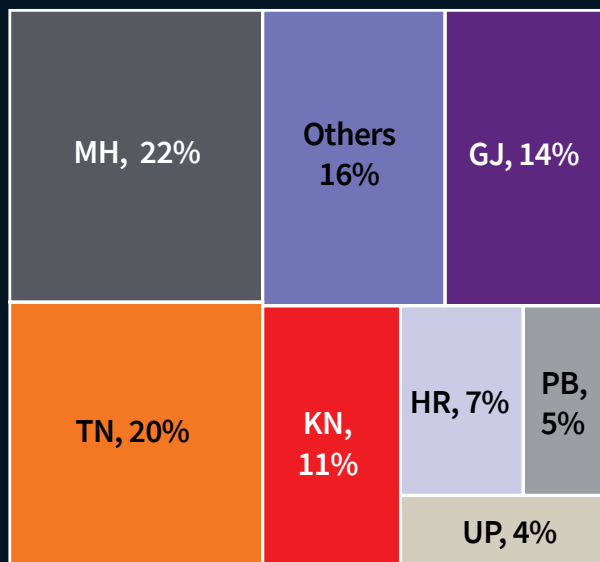
COMPUTERS, ELECTRONIC & OPTICAL PROD.



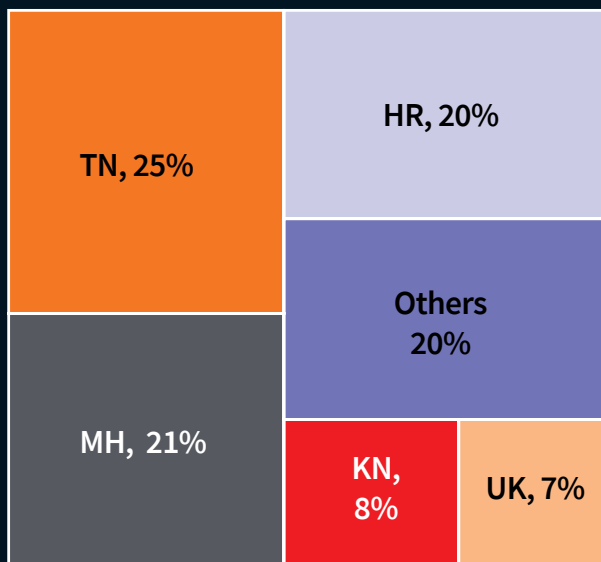
ELECTRICAL EQUIPMENTS



MACHINERY & EQUIPMENT



MOTOR VEHICLES & TRANSPORT EQUIPMENT



Source: ASI for Factory Sector 2016-17

Hilly States – Tax Exemptions Till 2027:

North-Eastern States (Assam, Sikkim, Arunachal Pradesh, Mizoram, Manipur, Meghalaya, Nagaland)

Himalayan States (Uttarakhand, Himachal Pradesh, Jammu & Kashmir)

- Boosting industrialization in hilly regions
- Cheaper credit access and interest incentives, among other benefits, which are over and above existing incentives
- Central Government initiative

Schemes:

- North East Industrial Development Scheme 2017
- Industrial Development Scheme for Himachal Pradesh and Uttarakhand 2017
- Industrial Development Scheme for Jammu & Kashmir 2017

MH: Maharashtra
UP: Uttar Pradesh
GJ: Gujarat
KN: Karnataka
UK: Uttarakhand
TS: Telangana
HP: Himachal Pradesh
GA: Goa
SK: Sikkim
WB: West Bengal
AP: Andhra Pradesh
RJ: Rajasthan
PB: Punjab
HR: Haryana
MP: Madhya Pradesh
TN: Tamil Nadu
DH: Dadra & Nagar Haveli
DD: Daman & Diu

State Incentives Snapshot

State Grid for a manufacturing investment of INR 100 million and above – Top 15 States by GSDP 2016-17

Nature of Incentives	Maharashtra	Tamil Nadu	Gujarat	Uttar Pradesh	Karnataka	West Bengal	Rajasthan
Stamp Duty Concession							
Land Benefits*							
Power Tariff Subsidy							
Electricity Duty Benefit					Specific sectors		
Capital Subsidy							Specific sectors
Interest Subsidy							Specific sectors
SGST related							
Some Sector (Manufacturing, IT-related) Specific Policies	Aerospace & Defence Cloud computing Fintech EV Textiles Electronics IT	EV Aerospace & Defence ICT Food Processing Textiles Solar Energy Auto & Auto Parts Biotechnology	Aerospace & Defence Agro Business Biotechnology Electronics Garments & Apparel Specific sectors in textile value chain Wind IT	EV Civil Aviation Electronics IT Solar Handloom, Powerloom Silk Textile Garmenting Food Processing Bio Energy Defence	ESDM Aerospace EV & Energy Storage AVGC Biotechnology IT (i4 policy) Agribusiness & Food Processing Solar	Design IT & Electronics Startup MSME Textile Fisheries Renewable Energy	Solar Energy IT Agro-Processing
Industrial Policy Link	Industrial Policy 2019	Industrial Policy 2014	Industrial Policy 2015	Industrial Investment and Employment Promotion Policy 2017	Industrial Policy 2014	Investment and Industrial Policy 2013	Rajasthan Investment Promotion Scheme 2019

Incentives available Incentives not applicable

Scan QR code to download state industrial and incentive policies.



Industrial Policy 2019, Maharashtra



Industrial Policy 2014, Tamil Nadu



Industrial Policy 2015, Gujarat



Industrial Investment and Employment Promotion Policy 2017, Uttar Pradesh



Industrial Policy 2014, Karnataka



Investment and Industrial Policy 2013, West Bengal



Investment Promotion Scheme 2019, Rajasthan

This is an indicative snapshot of the Industrial policy of the State only. It is recommended to study the detailed industrial policy and sectoral policies to gain a comprehensive understanding of all incentives. Does not include incentives specific to the Indian demographics. For instance, incentives for SC/ST/OBC. *Indicates land-related benefits such as Preferential Allotment, Conversion Fee Subsidy, Land Rates Subsidy, Registration Charges Subsidy, EDC Subsidy etc.

State Incentives Snapshot

State Grid for a manufacturing investment of INR 100 million and above – Top 15 States by GSDP 2016-17

Nature of Incentives	Andhra Pradesh	Telangana State	Kerala	Madhya Pradesh	Haryana	Punjab	Odisha	Bihar
Stamp Duty Concession				Specific sectors				
Land Benefits*								
Power Tariff Subsidy				Specific sectors				
Electricity Duty Benefit							Specific sectors	
Capital Subsidy	Specific clean sectors						Specific sectors	
Interest Subsidy							Specific sectors	
SGST related							Specific sectors	
Some Sector (Manufacturing, IT-related) Specific Policies	Solar Textiles Petro Wind Electronics IT Aerospace & Defence Auto & auto components Biotechnology Food Processing	ICT, IoT Electronics Data Centres Textiles Food Processing IMAGE (Gaming, Animation) Data Analytics Cyber Security e-Waste Management	IT EV Solar	IT and ESDM Food Processing Renewable energy Defence Production	Textiles Pharmaceuticals IT and ESDM Solar Power Agri business and FP Cyber Security	E-vehicle, NRSE Equipment, Energy Storage Devices, Medical Equipment, Industry 4.0 based manufacturing enterprises Textiles, Footwear and Accessories, Agri & Food Processing Industries, Electronics, Aerospace and Defence, Biotechnology, Pharmaceutical, Biomass / Agro-waste processing, Bicycle and Bicycle components/parts Alloy Steel, IT and ITES, Life Sciences Media and Entertainment, Logistics	Apparel Renewable Energy Aerospace & Defence Pharmaeuticals Food Processing ICT Biotechnology	IT ESDM Food Processing Textile, Apparel and Leather Renewable Energy
Industrial Policy Link	Industrial Development Policy 2015	Industrial Policy 2015	Kerala Industrial and Commercial Policy 2018	Industrial Promotion Policy 2014 (amended 2018)	Enterprise Promotion Policy 2015	Industrial and Business Development Policy 2017	Industrial Policy 2015	Bihar Industrial Investment Promotion Policy 2016

Incentives available Incentives not applicable

Scan QR code to download state industrial and incentive policies.



Industrial Development Policy 2015, Andhra Pradesh



Industrial Policy 2015, Telangana



Industrial and Commercial Policy 2018, Kerala



Industrial Promotion Policy 2014 (amended 2018), Madhya Pradesh



Enterprise Promotion Policy 2015, Haryana



Industrial and Business Development Policy 2017, Punjab



Industrial Policy 2015, Odisha



Industrial Investment Promotion Policy 2016, Bihar

This is an indicative snapshot of the Industrial policy of the State only. It is recommended to study the detailed industrial policy and sectoral policies to gain a comprehensive understanding of all incentives. Does not include incentives specific to the Indian demographics. For instance, incentives for SC/ST/OBC. *Indicates land-related benefits such as Preferential Allotment, Conversion Fee Subsidy, Land Rates Subsidy, Registration Charges Subsidy, EDC Subsidy etc.

Grounding Investments in India

Key Stakeholders and Investor Checklist



Central and State Governments of India are committed to welcoming investments and have **dedicated mechanisms, authorities** and agencies to facilitate the investor at each stage of the investment grounding process and accelerate their market entry into India.

Investor Facilitation Mechanisms

Key Central Government Stakeholders

Indian Missions:



- Government of India has 162 missions across the world.
- The trade and investment division at Indian Missions is responsible for investment promotion and facilitation.
- Indian Missions hold seminars and investor interactions at regular intervals for dissemination of investment opportunities in India.

Key Ministries for Business Matters

Trade: Ministry of Commerce & Industry; Department for Promotion of Industry and Internal Trade manages important national missions such as Make in India, Start-up India

Taxation: Ministry of Finance



Visa: Ministry of External Affairs & Ministry of Home Affairs

Incorporation & Corporate Governance: Ministry of Corporate Affairs

Human Resources: Ministry of Skill Development & Entrepreneurship

Foreign Exchange: Reserve Bank of India

Line Ministries



- Over 30 ministries are responsible for policy formulation and development of aligned sectors.
- Several ministries at central level offer attractive fiscal incentive packages such as Ministry of Food Processing, Ministry of Electronics & Information Technology etc.
- Some ministries also give grants for development of sector-specific industrial facilities, such as Plastic Parks by Ministry of Chemicals & Fertilizers, and Textile Parks by Ministry of Textiles.



Indian Missions Overseas can serve as the first point of contact for investors who are looking to enter the Indian market. Investors can coordinate with various Central Ministries on a need basis.

All organisations have dedicated websites which provide information pertaining to their function, structure and mode of contact.



Rashtrapati Bhawan, New Delhi

Key State Government Stakeholders



Department of Industries & Commerce:

- Department of Industries & Commerce is the most important as it is responsible for industrial policy formulation and implementation at the state level.
- This department also decides incentive packages through formal mechanisms described in the industrial or sectoral policies.



State Industrial Development Corporations (State IDCs):

- State IDCs are the entities responsible for land acquisition, development, promotion and maintenance of industrial infrastructure in their respective states.
- Every state in India has an IDC.



Investment Promotion Agencies (IPAs):

- Several states in India have formed dedicated Investment Promotion Agencies (IPAs) for investment promotion and facilitation.
- In states which don't have IPAs, IDCs act as the first point of contact for investors.

Investor should think about contacting either the IPA or IDC for their initial assessment work. These agencies can later help the investor connect with all relevant departments and agencies at state level.

All these organizations maintain separate websites which have useful information for market surveys and drawing project execution timelines.

INVESTOR CHECKLIST

Important Approvals for Investors in India

ESTABLISHMENT TO COMMISSIONING

Steps

Pre-Establishment Approvals

- Formation of entities – Private Ltd. / Public Ltd. / LLP / LO / BO / PO / OPC
- IEM / Udyog Aadhar
- GST Registration
- Allotment of Land / Land Conversion
- Property Registration
- Environment, Forest and Wildlife Clearances
- Building Plan Approval
- NOC from Fire Department
- Water and Sewerage Connection
- Electricity Connection
- Natural Gas Connection
- Consent to Establish (Pollution Department)
- Import Export License
- Sectoral Permissions / Licenses, for instance:
 - CDSCO – Drugs & Cosmetics
 - Excise – Alcohol for Human Consumption
 - FSSAI – Food & Beverages
 - PESO – Petroleum & Gas

Pre-Operation Approvals

- Building Occupancy Certificate
- Factory Licenses, Factories Act 1948
- Registration under The Shops & Establishment Act
- License for contractors under The Contracts Labour
- Registration of Boilers
- Consent to Operate (Pollution Department)
- Registration under Packaged Commodities Rules
- Application for fiscal incentives
- Application for EPFO (for 20 or more employees) and ESI (for 10 or more employees)

Key Stakeholders

Pre-Establishment Approvals

Central Ministries – Allied Offices (MCA, MSME, DGFT, DPIIT etc.)

Investment Promotion Agencies (IPAs)

State IDCs and Single Window Portals

Regulatory Authorities (RBI, BIS, DRI, DGFT etc.)

Pre-Operation Approvals

Central Ministries – Allied Offices (DPIIT, EPFO, ESIC etc.)

Investment Promotion Agencies (IPAs)

State IDCs and Single Window Portals

Municipal Authorities



KEY STAKEHOLDERS FOR INVESTOR FACILITATION

State-wise List and Links

States	State Industries & Commerce Department	State Industrial Development Corporation	State Investment Promotion Agency		Investment Promotion Summits	Single Window Portal
Southern States						
Tamil Nadu Capital: Chennai	https://www.tn.gov.in/department/16	SIPCOT	Guidance Tamil Nadu		Global Investor Meet	Easybusiness.tn.gov.in
Kerala Capital: Thiruvananthapuram	http://www.industry.kerala.gov.in/	KSIDC	K-BIP		Ascend	K-SWIFT
Karnataka Capital: Bengaluru	https://kum.karnataka.gov.in/indexe7dd.html?q=content/about-department-industries-and-commerce	KIADB		Invest Karnataka Forum	Karnataka Global Investor Meet	Karnataka Udyog Mitra
Andhra Pradesh Capital: Hyderabad	https://www.apindustries.gov.in/APIndus/Default.aspx	APIIC		Andhra Pradesh Economic Development Board (APEDB)	Sunrise Andhra Pradesh	Department of Industries
Telangana Capital: Hyderabad	http://www.industries.telangana.gov.in/Home.aspx	TSIIC		Investor Facilitation Cell (Commissionerate of Industries)	–	Telangana State Industrial Project Approval and Self- Certification System (TS-iPASS)
Western States						
Maharashtra Capital: Mumbai	https://industry.maharashtra.gov.in/en https://di.maharashtra.gov.in/_layouts/15/doistaticsite/english/index.html	MIDC	–		Magnetic Maharashtra	Maharashtra Industry, Trade and Investment Facilitation Cell (MAITRI)
Goa Capital: Panaji	http://goaditc.gov.in/	Goa IDC	Goa Investment Promotion and Facilitation Board		Vibrant Goa	Goa Investment Promotion and Facilitation Board
Gujarat Capital: Gandhinagar	http://www.imd-gujarat.gov.in/index https://ic.gujarat.gov.in/	GIDC	iNDEXTb		Vibrant Gujarat	Investor Facilitation Portal
Rajasthan Capital: Jaipur	http://industries.rajasthan.gov.in/content/industries/doi.html	RIICO	Bureau of Investment Promotion Rajasthan		Resurgent Rajasthan	Single Window Clearance System
Central States						
Madhya Pradesh Capital: Bhopal	http://www.mpindustry.gov.in/	MPSIDC		–	Global Investor Summit	MP Invest
Chhattisgarh Capital: Raipur	https://industries.cg.gov.in/	CSIDC	CSIDC CHIPS		–	State Investment Promotion Board (SIPB)

Note: Union Territories are excluded

Note: Union Territories are excluded

KEY STAKEHOLDERS FOR INVESTOR FACILITATION

State-wise List and Links

States	State Industries & Commerce Department	State Industrial Development Corporation	State Investment Promotion Agency	Investment Promotion Summits	Single Window Portal
Northern States					
Haryana Capital: Chandigarh	https://haryanaindustries.gov.in/	HSIIDC	Invest Haryana (HEPC)	Happening Haryana	Invest Haryana (HEPC)
Uttar Pradesh Capital: Lucknow	http://www.updi.in/home	UPSIDC Noida Authority Greater Noida Authority YEIDA	Udyog Bandhu	UP Investor’s Summit	Nivesh Mitra
Punjab Capital: Chandigarh	www.pbindustries.gov.in	PSIEC	INVEST PUNJAB (Punjab Bureau of Investment Promotion)	Progressive Punjab Investors Summit	INVEST PUNJAB www.investpunjab.gov.in
Uttarakhand Capital: Dehradun	https://www.doiuk.org/	SIDCUL	Investment Promotion & Facilitation Cell	Destination Uttarakhand Summit	Invest Uttarakhand
Himachal Pradesh Capital: Shimla	https://www.emerginghimachal.hp.gov.in/	HPSIDC	–	Rising Himachal: Global Investors Meet	Department of Industries
Eastern States					
Bihar Capital: Patna	http://industries.bih.nic.in/	BIADA	Invest Bihar	–	Single Window Clearance System
West Bengal Capital: Kolkata	https://wb.gov.in/portal/web/guest/commerce-and-industries	WBIDC	–	Bengal Summit	Silpa Sathi
Odisha Capital: Bhubaneswar	http://industries.odisha.gov.in/	IDCO GO-PLUS	IPICOL	Make in Odisha	GO-SWIFT GO-SMILE (Inspection Reforms)
Jharkhand Capital: Ranchi	http://www.jharkhand.gov.in/industries1	JIADA	–	Momentum Jharkhand	Advantage Jharkhand
North Eastern States					
Assam Capital: Dispur	https://industries.assam.gov.in/	AIDC	Invest Assam	Advantage Assam	Ease of Doing Business in Assam
Sikkim Capital: Gangtok	http://www.sikkimindustries.in/	SIDICO	–	–	–
Arunachal Pradesh Capital: Itanagar	http://aruntrade.gov.in/	APIDFC	–	–	–
Tripura Capital: Agartala	http://industries.tripura.gov.in/	TIDC	Tripura State Investment Promotion Board	–	–
Nagaland Capital: Kohima	http://industry.nagaland.gov.in/	NIDC	Investment & Development Authority of Nagaland (IDAN)	–	–
Mizoram Capital: Aizawl	https://industries.mizoram.gov.in/	ZIDCO	–	–	–
Meghalaya Capital: Shillong	http://megindustry.gov.in/	Meghalaya Industrial Development Corporation	Meghalaya Investment Promotion Board	–	–

Note: Union Territories are excluded

Glossary

ASEAN: Association of Southeast Asian Nations

AVGC: Animation, Visual effects, Gaming and Comics (AVGC)

BCD: Basic Custom Duty

BIS: Bureau of Indian Standards

BO: Branch Office

BT: Bio-Tech

CDSCO: The Central Drugs Standard Control Organization is the national regulatory body for Indian pharmaceuticals and medical devices, and serves parallel function to the European Medicines Agency of the European Union, the PMDA of Japan, the Food and Drug Administration of the United States and the Medicines and Healthcare products Regulatory Agency of the United Kingdom.

CoE: Center of Excellence:

CVRDE: Combat Vehicles Research and Development Establishment

DGFT: Directorate General of Foreign Trade

DMIC: Delhi Mumbai Industrial Cluster

DPIIT: Department for Promotion of Industry & Internal Trade

DRI: Directorate of Revenue Intelligence

DTZ/ DTA: Domestic Tariff Zone/ Domestic Tariff Area

EMC: Electronic Manufacturing Cluster

EMEA: Europe-Middle East-Africa

EoDB: Ease of Doing Business. The Ease of Doing Business (EoDB) index is a ranking system established by the World Bank Group.

EPFO: Employees' Provident Fund Organization. EPFO assists the Central Board in administering a compulsory contributory Provident Fund Scheme, a Pension Scheme and an Insurance Scheme for the workforce engaged in the organized sector in India

ESDM: Electronics System Design & Manufacturing

Glossary

ESIC: Employees' State Insurance Corporation. Employees' State Insurance is a self-financing social security and health insurance scheme for Indian workers.

EXIM: Export & Import

FAME II Policy: The Faster Adoption and Manufacturing of (Hybrid &) Electric Vehicles (FAME) India was launched in 2015 under National Electric Mobility Mission (NEMM). It aims at promoting eco-friendly vehicles in the country. The Heavy Industries Ministry is administering the scheme.

FDA approved: The Food and Drug Administration (FDA) is a federal agency of the United States Department of Health and Human Services. FDA approved means that the agency has determined that the "benefits of the product outweigh the known risks for the intended use." Manufacturers must submit a premarket approval (PMA) application and the results of clinical testing in order to get approval.

FEMA: The Foreign Exchange Management Act (FEMA), 1999 is an Act of the Parliament of India "to consolidate and amend the law relating to foreign exchange with the objective of facilitating external trade and payments and for promoting the orderly development and maintenance of foreign exchange market in India"

FMCG: Fast Moving Consumer Goods

FSSAI: Food Safety and Standards Authority of India (FSSAI) is an autonomous body established under the Ministry of Health & Family Welfare, Government of India. The FSSAI has been established under the Food Safety and Standards Act, 2006 that is a consolidating statute related to food safety and regulation in India.

FTWZ: Free Trade Warehousing Zones

GDP: Gross Domestic Product is the monetary value of all finished goods and services made within a country during a specific period

GSDP: Gross State Domestic Product is defined as a measure, in monetary terms, of the volume of all goods and services produced within the boundaries of the State during a given period of time, accounted without duplication.

GVA: Gross Value Added is the measure of the value of goods and services produced in an area, industry or sector of an economy

HDI: Human Development Index is a summary measure of average achievement in key dimensions of human development: a long and healthy life, being knowledgeable and have a decent standard of living. The HDI is the geometric mean of normalized indices for each of the three dimensions.

ICD: Inland Container Depot

ICT: Information & Communication Technology

Glossary

IDC: Industrial Development Corporation

IEM: Industrial Entrepreneurs Memorandum. An IEM is an application for acknowledgment of application for setting up industrial unit.

IGST: Integrated Goods & Services Tax

INR: Indian National Rupee

IoT: Internet of Things

IPA: Industrial Park Area

IT & ITes: Information Technology & Information Technology Enabled Services

Labour Force Participation: Labour force participation rate is defined as the section of working population in the age group of 18-64 in the economy currently employed or seeking employment.

LLP: Limited Liability Partnership. A limited liability partnership (LLP) is a partnership in which some or all partners (depending on the jurisdiction) have limited liabilities.

LNG: Liquefied Natural Gas

LO: Liaison Officer

MCA: Ministry of Corporate Affairs

MIHAN: Multi-modal International Cargo Hub and Airport at Nagpur

MNCs: Multi-National Companies

MPSEZ: Multi-Product SEZ

MSME: Micro, Small & Medium Enterprises

NATRIP: National Automotive Testing and R&D Infrastructure Project (NATRiP),

NOC: No Objection Certificate

Glossary

OFC: Optical Fiber Cables

OPC: One Person Company. “One Person Company” means a company, which has only one person as a member.

PE: Private Equity

PESO: Petroleum And Explosives Safety Organisation (PESO) is a department formed by Government of India under Department for the Promotion of Industry and Internal Trade under Ministry of Commerce and Industry, to administer Explosives Act 1884, Explosive Substance Act, Petroleum Act 1934, Inflammable substance Act 1952 and Environment Protection Act 1986 to control import, export, transport, storage and usage of explosive materials, flammable materials, pressure vessels, cryogenic vessels, design and installation of all necessary and relevant infrastructure, etc.

PO: Project Office

R&D: Research & Development

RBI: Reserve Bank of India

SEZ: Special Economic Zone is an area with quality infrastructure complemented by an attractive fiscal package, both at the Centre and at the State level, with the minimum possible regulations for generation of additional economic activity, promotion of exports of goods and services, investment from domestic and foreign sources and creation of employment opportunities.

SWS: Social Welfare Surcharge

TEUs: Twenty-Foot Equivalent Unit is an inexact unit of cargo capacity often used to describe the capacity of container ships and container terminals.

VC: Venture Capital

VCIC: Vishakhapatnam Chennai Industrial Corridor

WDFC: Western Dedicated Freight Corridor

Methodology

This report is a compilation of facts, qualitative trends and analysis of information collected through surveys and interactions with multiple stakeholders active in the industrial ecosystem of India. Competitive locations were identified through trends analysis of enquiries by existing and potential investors pan-India, and interviews with supply-side entities dealing in development and promotion of industrial destinations in India.

An evaluation of identified locations was undertaken on multiple aspects such as business environment, human resources, infrastructure

availability, social factors, and manufacturing ecosystem. Detailed feedback was collected from relevant departments of identified state governments such as Industries Department, Industrial Development Corporations and the Investment Promotion Agencies to understand the key industrial trends in the State, along with the highlights of recent industrial activity, focus areas, developmental vision, key initiatives etc. Additionally, critical evaluation of locations was carried out basis investor experiences and feedback of various multi-nationals operational in these locations.

Source

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About Invest India

Invest India is the National Investment Promotion and Facilitation Agency of the Government of India mandated to facilitate investments in India. Besides investor targeting and facilitation, Invest India runs effective programs for resolving issues and grievances of existing investors through its after-care programs.

A 150+ member team provides sector-and state-specific investment opportunities, advises investors on regulatory procedures and clearances, and hand-holds investors through the entire investment process. Invest India team comprises of highly educated and experienced professionals, with prior experience of working with foreign multinationals across areas such as investment banking, consulting, corporate strategy, taxation and law.

Headquartered at New Delhi, Invest India coordinates with all Indian stakeholders such as central ministries, state governments, Indian missions across the globe, regulatory bodies, Industry chambers, etc. In addition, Invest India has forged partnerships with a large number of foreign stakeholders such as foreign missions and trade offices in India, investment promotion agencies for key FDI source countries, sectoral industry associations and bilateral chambers. The firm has a strong working relationships with all Indian states and union territories, where it works to build capacity, formulation of regional plans for investment facilitation and industrial cluster development.

Invest India, set up in 2009, is a non-profit venture under the Department for Promotion of Industry and Internal Trade, Ministry of Commerce and Industry, Government of India. Currently, it manages key national missions and initiatives such as Make in India, Start-up India, Project Monitoring Group, Accelerating Growth of New India's Innovations (AGNI), India Investment Grid (IIG) and Industrial Information System (IIS).

The firm is one of the most awarded Investment Promotion Agency in the world, and has won the Best Investment Project Award three years in a row (2016, 2017 and 2018) at the Annual Investment Meeting (AIM) organized by the Ministry of Economy, UAE. Invest India also won the prestigious The UNCTAD Award 2018 for promoting investment in sustainable development, the UNCTAD Investment Promotion Award 2016 for excellence in partnering for investment promotion, and the Investment Award 2016 from the Indian Ocean Rim Association, among others.

Please learn more about Invest India at
<https://www.investindia.gov.in/>

About JLL

JLL (NYSE: JLL) is a leading professional services firm that specialises in real estate and investment management. Our vision is to reimagine the world of real estate, creating rewarding opportunities and amazing spaces where people can achieve their ambitions. In doing so, we will build a better tomorrow for our clients, our people and our communities. JLL is a Fortune 500 company with annual revenue of \$16.3 billion, operations in over 80 countries and a global workforce of over 90,000 as of December 31, 2018. JLL is the brand name, and a registered trademark, of Jones Lang LaSalle Incorporated. For further information, visit jll.com

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JLL is India's premier and largest professional services firm specialising in real estate. With an audited revenue of 4,134 crores for FY 2018-19, the Firm is growing from strength to strength in India for the past two decades. JLL India has an extensive presence across 10 major cities (Mumbai, Delhi NCR, Bengaluru, Pune, Chennai, Hyderabad, Kolkata, Ahmedabad, Kochi and Coimbatore) and over 130 tier II & III markets with a cumulative strength of close to 12,000 professionals.

The Firm provides investors, developers, local corporates and multinational companies with a comprehensive range of services. This includes leasing, capital markets, research & advisory, transaction management, project development, facility management and property & asset management. These services cover various asset classes such as commercial, residential, industrial, retail, warehouse and logistics, hospitality, healthcare, senior living, data centre and education.

JLL India won the Five Star Award for 'Best Property Consultancy at the International Property Awards Asia Pacific 2018-19. The Firm was also recognised amongst the 'Top 100 Best Places to Work in India' three years in a row (2017, 2018 and 2019) in the annual survey conducted by Great Place to Work® and The Economic Times. It has also been acknowledged as 'Property Consultant of the Decade' at the 10th CNBC-Awaaz Real Estate Awards 2015. For further information, please visit jll.co.in

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