

STATES OPPORTUNITES IN INDIA

INDIA – NEW ZEALAND DELEGATION VISIT, AUGUST 2023



सत्यमेव जयते

Government of India



India's North East Region





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Northeast India-Emerging Frontier of India's Growth



The Northeast comprising of Arunachal Pradesh, Assam, Manipur, Meghalaya, Mizoram, Nagaland, Sikkim and Tripura with a growth rate of 8 percent (FY2015-2022) is emerging as a frontier of India's growth story

Common Thrust Sectors



Agriculture



Tourism



Higher Education



Healthcare



Logistics & Infrastructure

Gateway to Southeast Asia

- Shares borders with Bangladesh, Bhutan, China, Myanmar and Nepal
- Special focus under India's Act East Policy

Skilled workforce

- **82% literacy rate**, > national average
- ~**60% in working age** of 15-59 yrs
- Home to Premier institutes like IIT, IIM, NIT, NIFT

Abundance of Power & Natural Resources

- **Energy:** 42% of the country's total hydro potential
- **Limestone:** 5000 Mn Tonnes (reserves)
- **Oil:** 500 Mn Tonnes (reserves)

Bio-diversity Hotspot

- Over 7,500 species of plants; 650+ rare orchids
- Rubber, Bamboo, Tea

Why Invest in the Northeast?





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Agri-allied Sector



Nearly **60%** of India's Organic Kiwi production from NER-Arunachal Pradesh
4th Largest producer of Orange



Largest Banana and Dry-fish market in Asia



Leading producer of Cardamom & Pineapple



3rd in India for production of Ginger & Areca Nut



2nd largest producer of Natural rubber in India-Tripura

Global Tea hub; Produces more than 50% of India's tea



24 Geographic Indication (GI) tagged agri-products in NER

Investment and Collaboration Opportunities



Input Supply, Production-Augmentation



Food Processing, Rubber/Bamboo Processing, Distilleries



Market linkages, Quality Checks, Brand promotion



Capacity building/ Center of excellence



Logistics & Supply chain, Post Harvest facility/infrastructure



R&D & Innovation



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Tourism Sector



Culture & Heritage

Unique cultures,
Cuisines & festivals.



Rural, Eco & Off-beat

Eco-camps,
Whistling village,
25+ National Parks



Golf and Tea Tourism

21 Golf courses,
Asia's **oldest** golf
courses are in NER



Adventure Tourism

70+ peaks
Opportunities for Skiing,
Caving, Paragliding,
River cruising



Medical & Wellness

Assam, Manipur, Me
ghalaya & Tripura
have the potential
for **medical tourism**.

Investment and Collaboration Opportunities



Tourism Infrastructure

Hotels, roadside amenities,
Adventure tourism, Golf courses,
hospitals etc.



Tours & Travels

Exchange visits and
collaboration between tour &
travel operators for awareness &
promotion of the region



Training in Hospitality

Establishment of Skill centers
for hospitality sector



Technical Training:

Skills and safety standards
for new adventure sports



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Education & Skill Development



Highlights

- **79** universities, **1001** colleges, and **224** standalone institutions
- **96496** schools in Primary & Higher Secondary education sector
- **Large Skilling Program in partnership between Government & Private Sector**
- Large number of students travel to other parts of the world for education



Opportunities

- Private schools & international curriculum
- Vocational training institutions
- Bridge courses
- Skill Development in key Sectors
- Centres of Excellence
- University Collaborations/ Student Exchange Programs





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Logistics and Infrastructure



Gateway to ASEAN countries



India's 1st Multi-modal logistics Park in Assam; 6 SEZ notified in NER



17 Airports
2 international airports



7 states connected by Railways

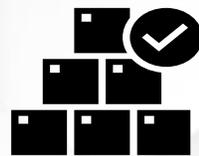


20 rivers in the Northeast were declared as National Waterways

Investment and Collaboration *Development/ Upgradation of*



Industrial/
Sectoral Parks/ Estates



Export
Promotion Hubs



Infrastructure
development in
Inland water
Terminals



Warehouse and
Distribution Centres



Port Townships





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Health and Pharma Sector



Key Highlights

182 different medicinal, aromatic plants



Sikkim
Gangtok

300 medicinal plants



Assam
Dispur

830+ medicinal plants, 2,500+ traditional healers

266 species of medicinal plants



500+ medicinal plants



650 medicinal plant species

400+ medicinal plants

82 medicinal plant species documented

Investment and Collaboration Opportunities

Supply side Augmentation

- Contract farming
- Manufacturing & Export

Capacity Building, R&D, Skill Development

- Setting up of R&D, Innovation Center, Testing lab
- Capacity building of practitioners

Promotion of Traditional Practices

- Developing Wellness Centers / Herbal clinics
- Promoting Medical Tourism
- Quality Assurance
- Aggregation platform for traditional healers
- Branding and promotion of traditional medicines

Sikkim: One of the biggest Pharma Hubs in the country (50+)



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Other Sectors



- Unexplored capacity of **1,28,962 MW in RE**
- **Arunachal Pradesh:** Largest hydropower potential in India (50,328 MW)
- **Opportunities:** Bamboo Ethanol, Methanol Industry, Green Hydrogen
- **12 GI tagged weaves,**
- **65% of Eri and 95% of Muga Silk** from Assam
- **Opportunities:** Textile & Apparel Park, Yarn Banks;
- Common Facilities Centers, Improved Machinery, Collaboration with Design Institutes, Technical Textile Manufacturing

Energy

Sports and Entertainment

- **Shillong: "Rock Capital of India"**
- **10+ Music Festivals;**
- **10+ Football stadiums**
- **National Sports University in Manipur**
- **Opportunities:** Film/Music Institutes; Recording Studios; Editing/Animation Labs, Collaborations for Music festivals; Sports academies

Textiles , Handloom & Handicraft

IT and ITeS

- **Software Technology Park** in Guwahati
- **IT Parks** in Manipur and Tripura;
- **Opportunities:** Plug and Play infrastructure, BPO/KPO, Startup Incubation Hub



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State Policies



Key Incentives offered under State Industrial Policies



Capital Investment Subsidy



Interest Subsidy on Term Loans



Working Capital Loan



Power Subsidy



Exemption on Stamp Duty and Registration Fees



SGST Exemption



Green Compliance Subsidy

Key Progressive State Policies

- Arunachal Pradesh Start Up Policy, 2022
- The Handicraft Policy of Assam, 2022
- Assam Logistic & Warehousing Policy, 2022
- Assam Bamboo and Cane Policy, 2019
- Manipur Integrated Logistics Policy, 2022
- Manipur Mineral Policy, 2021
- Meghalaya Electric Vehicle Policy, 2021
- Meghalaya State Sports Policy, 2019
- The Mizoram State Logistic Policy, 2022
- Nagaland Coal Policy (First Amendment), 2014
- Sikkim Film Policy 2021
- Tripura IT/ITeS Policy 2022
- Tripura Agarwood Policy 2021



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Collaborations || NER and New Zealand



Sports



Meghalaya Cricket Association joined hands with CricHQ to promote inclusive cricket

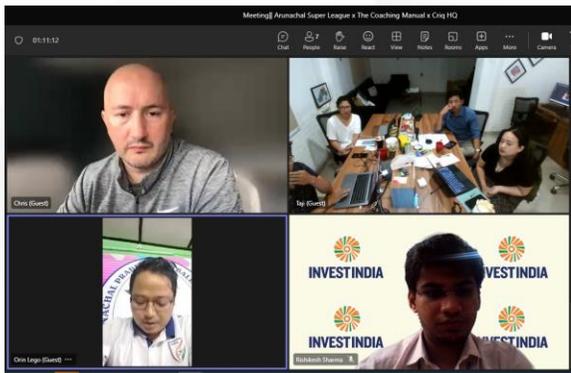
Joint Press release by CricHQ & Meghalaya Cricket Association

Meghalaya Cricket Association is pleased to announce an official partnership with My Action Replay and cricHQ for live streaming and digital scoring of all levels of cricket being played under the aegis of Meghalaya Cricket Association.

The partnership will equip the Meghalaya Cricket Association to live stream the matches and have greater access to individual player data, historical data, competition and fixtures management, analytics and help encourage the game of cricket. cricHQ will work with



MoU between Meghalaya Cricket Association (MCA) and My Action Replay & CricHQ for live streaming and digital scoring of cricket matches



Collaboration between the Coaching Manual, CricHQ and Arunachal Pradesh for training coaches and sportspersons for Arunachal Super League



Meeting with Zespri International to improve Kiwi Ecosystem in NER

Agri and Allied



Aviation



Discussion between New Zealand Airline Academy and Govt of Arunachal Pradesh for Setting up of Flying Training Institute at Donyi Polo Airport Itanagar

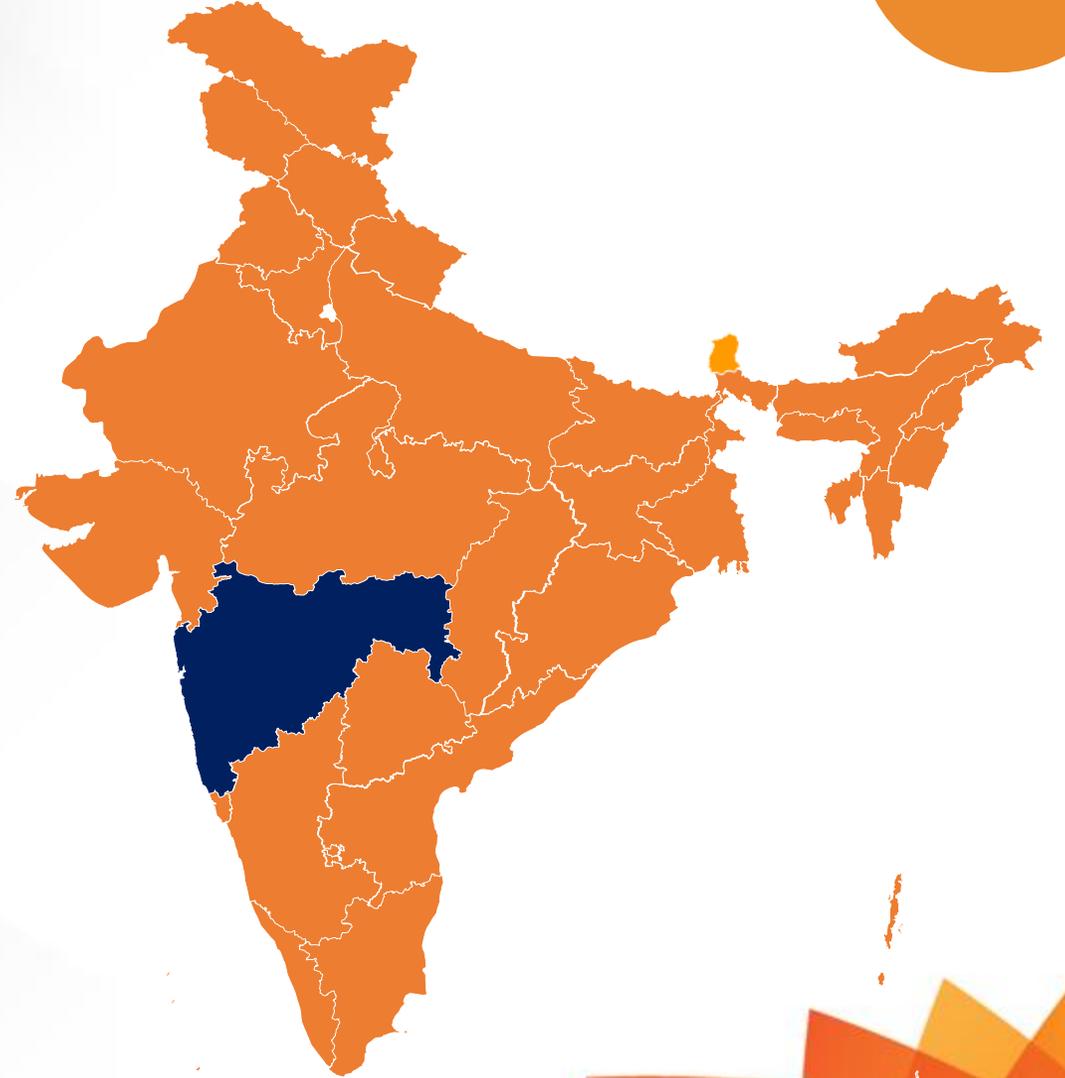


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Maharashtra





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Social Economic Profile of Maharashtra



Maharashtra's GDP size is **\$424 billion**; accounting for **14%** of India's GDP.



Largest GSDP in India

Highest FDI inflow received between Oct'19 – Mar'23 approx. **\$ 53.9 Bn**



Largest share in FDI

Maharashtra has a strong textiles base with PM Mitra Textiles Park in Amravati & 12 textile parks



Textile - Focus Sector

Pune is the largest auto hub in India; Major auto research institutes present.



Leader in Auto & Auto Parts Manufacturing

Maharashtra has one of the highest value of exports – 16%; & 14% of the Industrial output



Leader in Manufacturing & Exports

Mumbai Port & SEEPZ SEZ account for approx. 40% share in gold and jewellery export. Presence of IJPM, Bharat diamond Bourse



Strong Gems & Jewelry Base

Largest base of Internet Subscribers in India at **99 million.130 million** telecom



Growing Digitisation

One of the leading states with 877 Engineering, 1046 Pharmacy, 328 Management Colleges and 994 ITIs



Best Colleges in India

70% Best Quality Workforce. One of the highest employable talent



Best Quality Workforce



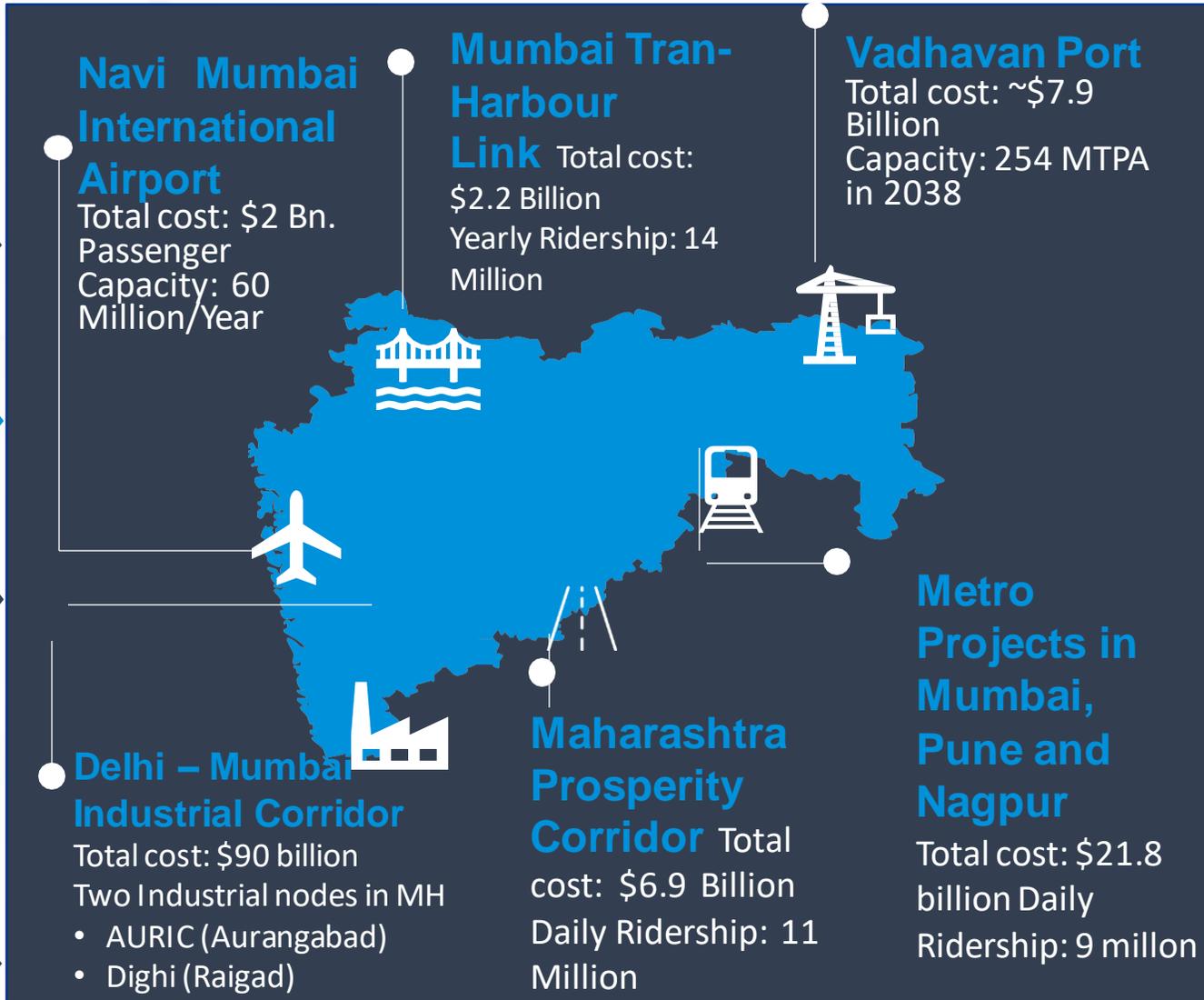
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Infrastructure Led Growth



Major Infrastructure Projects in Maharashtra

	Roads	6.3 Lakh Km Total Road Length as of 2019
	Railways	5,800 Km Share of railway route in India
	Airports	4 International, 13 Domestic
	Ports	2 Major and 48 Minor Ports
	Ports Capacity	JNPT: 10 Million TEU Mumbai Port, Jawahar Dweep Oil Terminal: 1.5 L tonnes cargo
	Telecom	~130 Mn Telecom subscribers ~99 Mn Internet subscribers
	Power	45,546 Installed Power Capacity (MW) as Mar 2023
	SEZs	37 Operational, 96 In-principle approvals, 51 formal and 45 notified approvals
	Universities	67 World Class Universities
	MIDC	290 Industrial Area



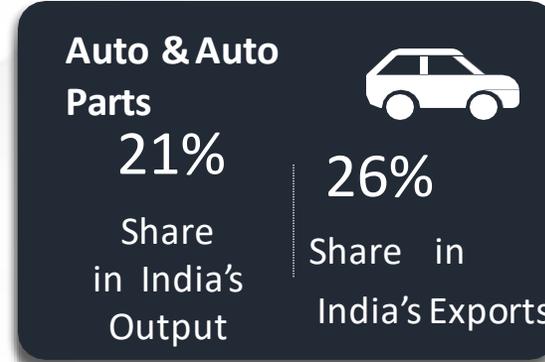
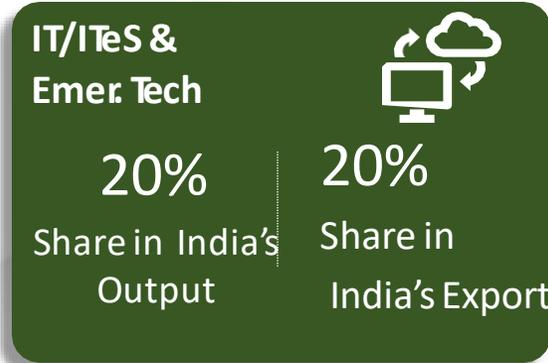
Source: RBI Handbook of Statistics 2020; NITI Aayog State Statistics; DGCIS Database; IBEF; India Energy Portal; India Skills Report 2020; Internet

738 Number of Mega Projects approved	\$73Bn Total Investment	6.72L Employment Generated
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Leading in Major Sectors





Dynamic Policy Ecosystem

*Maharashtra has developed industry and sector specific policies. The state consistently updates its incentives and offerings in line with the changing global economic dynamics and business scenarios.
For Mega and Ultra Mega Projects, a customized package of incentives can be granted by the Industries Department.*



Industrial Policy, 2019 & Package Scheme of Incentives, 2019*



Aerospace & Defence Manufacturing Policy



IT and IT Enabled Services Policy



Fintech Policy



ESDM & Display Panel FAB Policy,



Electric Vehicle and related Infrastructure Policy



Agro Processing Policy



Integrated Logistics Parks Policy 2018



Textile Policy 2023



Incentive for Development of Integrated Industrial Area - 2018

Maharashtra has become the first state in the country to introduce the green hydrogen policy*

* Details mentioned in the next slide



Package Scheme of Incentives : 2019



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Ultra Mega & Mega Projects

Qualification Criteria			
Project Classification	Area Classification	FCI (INR Cr.)	Minimum Direct Employment
Ultra Mega Industrial Unit	Entire State	4000	4000
	A & B	1500	2000
Mega Industrial Unit	C	1000	1500
	D	750	1000
	D+	500	750
	VMRSD*	350	500
	NID, NAA, AD	200	350



Large Scale Industries (LSI)

Area Classification	Min FCI (INR crore)	Minimum Direct Employment	Max as % of FCI	Incentive period (Yr)
A & B (Only LSI)	750	1000	25%	7
C	500	750	40%	7
D	250	500	60%	7
D+	150	400	70%	7
VMRSD*	100	300	80%	9
NIA, NAA, AD	100	250	100%	9



MSME

Area Classification	Max FCI	Ceiling as % of FCI	Eligibility Period (yrs)
A	MSME shall include units as per the MSMED Act, 2006, as well as the units with FCI of upto INR 50 crore	-	-
B		30%	7
C		40%	7
D		50%	10
D+		60%	10
VMRSD*		80%	10
NIA, NAA, AD#		100%	10

Policy Highlights

- 100% Captive Process Vendor (CPV) investment to be considered as part of admissible FCI
 - CPV and Captive Power Plant won't be counted for determining qualifying criteria
 - HPC to recommend customized Package of Incentives on case-to-case basis
 - Projects of Special Importance (may or may not be Mega/Ultra-Mega projects) may get customized package of incentives on case-to-case basis via HPC
 - State government will be equity partner of 9% through MVRPL in projects with FCI of more than 500 crores
 - Allocation of MIDC land to on priority basis
-
- 100% stamp duty exemption in C,D,D+, Talukas, Aspirational Districts, NID regions and in A, B region only for BT manufacturing and IT parks in Public(100%) and Private (75%)
 - IPS on Gross SGST paid by units
 - LSI units in Food Processing, Green Energy and Industry 4.0 to get additional fiscal support
 - Thrust sectors to get additional incentives – EV, Aero & Def, Industry 4.0, IDCP, Textiles, Biotech, Agro, IT&ITeS,ESDM, Logistics, Green Energy, Sports, Nuclear Pow, Mineral
 - Incentives to promote quality competitiveness, R&D, technology up-gradation, water & energy conservation, cleaner production and credit rating
-
- In New MIDC industrial estates, 20% area to be reserved for MSMEs; Up to 100% stamp duty exemption.
 - Electricity duty exemption for Eligibility period; IPS on Gross SGST paid by the units.
 - Power tariff subsidy (except A zone) to an extent of Rs 1 per unit for 3 years.
 - MSMEs in Food Processing, Green Energy and Industry 4.0, will get additional fiscal support
 - Interest subsidy @ 5 % p.a. (except A zone), maximum upto electricity bills paid for the year; Marketing Assistance scheme
 - Fiscal assistance to SC/ST/women entrepreneurs

Scale of Industries

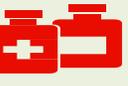
*Vidharbha Marathwada Ratnagiri Sindhadurg Dhule; NAA: Naxalism Affected Area, NID: No Industry District, AD: Aspirational Districts



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Sector Wise Key Players



 <p>Auto and Auto Component Sector</p>	      
 <p>Chemical Sector</p>	     
 <p>Defence Sector</p>	      
 <p>ESDM Sector</p>	      
 <p>Food & Agro Sector</p>	       
 <p>Gems and Jewellery Sector</p>	       
 <p>Pharmaceutical Sector</p>	      
 <p>IT & ITes Sector</p>	     
 <p>Textile Sector</p>	     



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Andhra Pradesh



Andhra Pradesh – Driving India's Transformation



Area

8th Largest State in India
spread across **162,968** sqkm

Sustainable Development

#3 Rank in the country in
SDG Goals

Workforce

71% of the population is in the
working-age group
State tops highest in skilled
women workforce

Ease of Doing Business

Ranked **#1** on Business Reforms, **21** Depts and **93**
Online approvals covered with **99.79%** SLA

Connectivity

974 km

Second longest coastline in India with 4 large ports for Indo-Pacific trade

GSDP

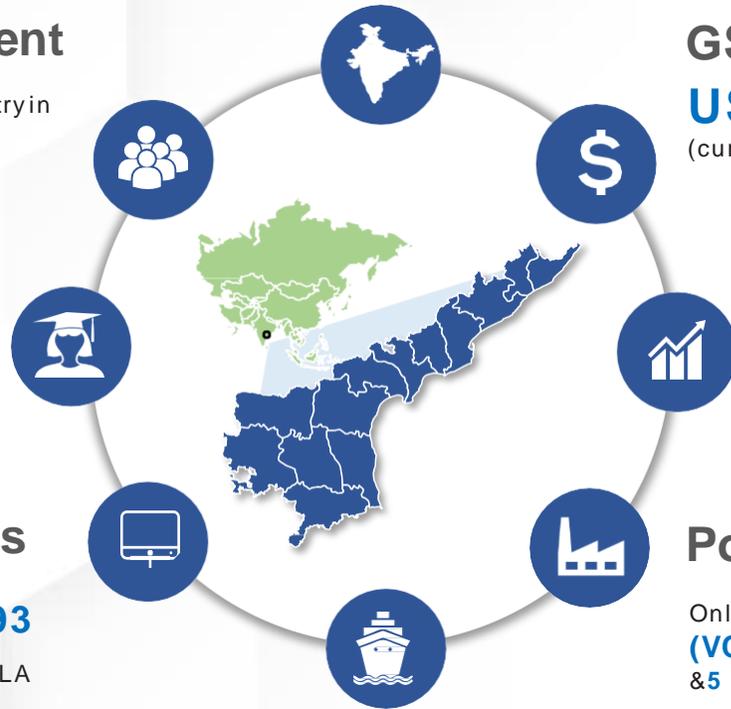
USD 183 bn
(current price) in 2022-23

Industrial Output

USD 35.1 bn
YoY growth of **5.6%**

Port-led Industrial Corridors

Only state in India to have **3 National Industrial Corridors**
(**VCIC, CBIC, HBIC**), with **48,352** Acs of industrial land bank
& **5 NICDC Nodes**



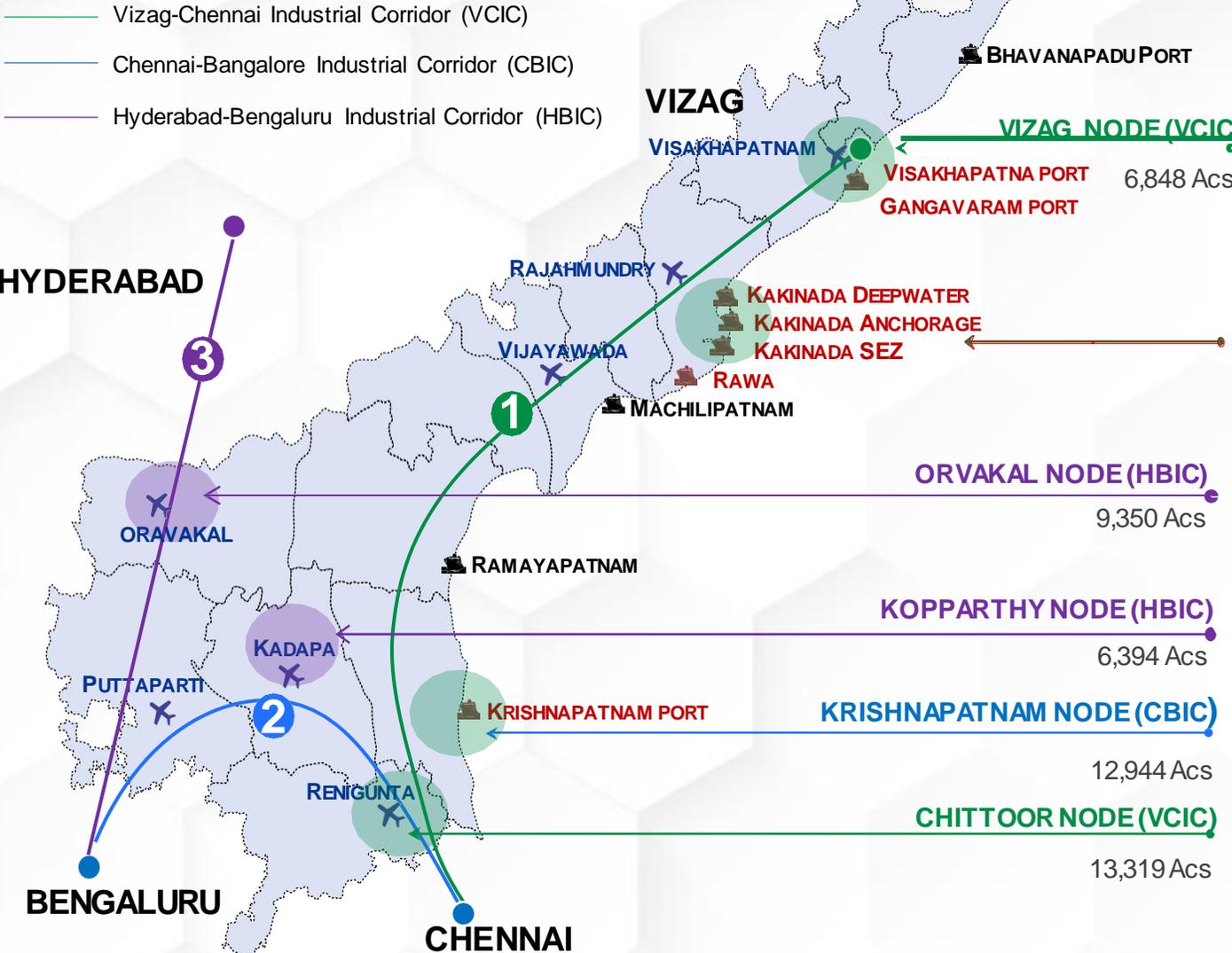


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Advantage AP – Corridor and Port-led Industrial Development



Only state in India to have **3 National Industrial Corridors**, across 48,352 Acres of land bank



VISHAKAPATNAM PORT
Capacity: 125 MMT PA
 (Iron ore, Granite, Metals, Coal, Rice, Petroleum products)

New Ports Planned

KAKINADA PORT
Capacity: 14 MMT PA, upgrade to 27 MMT PA
 (Rice, Maize, Granite, Dedicated berth for Petrochemical complex)

- Machilipatnam
- Ramayapatnam
- Bhavanapadu
- Kakinada SEZ

New Airports Development

KRISHNAPATNAM PORT
Capacity: 54 MMT PA
 (Barytes, Quartz, Agro-based, Liquid Storage for LPG, LNG, POL Products)

- Orvakal Airport
- Bhogapuram, Vizianagaram
- Dagadarthi, Nellore

Ready Built Factories

“Top achiever in Logistics Ease”, as per LEADS 2022 report.

- Plug & Play at all APIIC Industrial parks
- Competitive Rentals

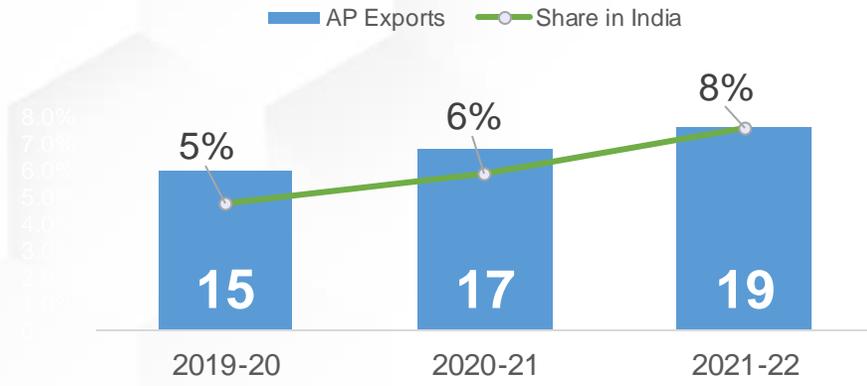


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Andhra Pradesh - Contributes to 8% of total Indian exports



USD 19 Bn
Total Exports
2021-22

Exports from AP are growing at **CAGR of 13%** in past 3 years

<p>USD 2,631 Mn</p> <p>Marine Products</p> 	<p>USD 1,584 Mn</p> <p>Iron & Steel</p> 	<p>USD 1,293 Mn</p> <p>Ship, Boat & floating structure</p> 	<p>USD 738 Mn</p> <p>Residual Chemicals</p> 	<p>USD 729 Mn</p> <p>Drug Formulation</p> 	<p>USD 719 Mn</p> <p>Rice</p> 	<p>USD 454 Mn</p> <p>Granite & Stone</p> 	<p>USD 424 Mn</p> <p>Spices</p> 
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Trading Partners & Commodity basket of Andhra Pradesh

Americas



USA Brazil

USD 4,648 Mn

East Asia



China Japan

USD 2,150 Mn

South Asia



Sri Lanka Bangladesh

USD 1,255 Mn

Gulf



UAE Saudi Arabia

USD 1,153 Mn

South-East Asia



Vietnam Malaysia Indonesia

USD 1,503 Mn

Europe



Turkie Italy Belgium
Netherlands Germany France

USD 1,590 Mn



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Andhra Pradesh - Country Clusters and International Trade



Major Export Destinations



USD 19 bn as on FY 2021-22



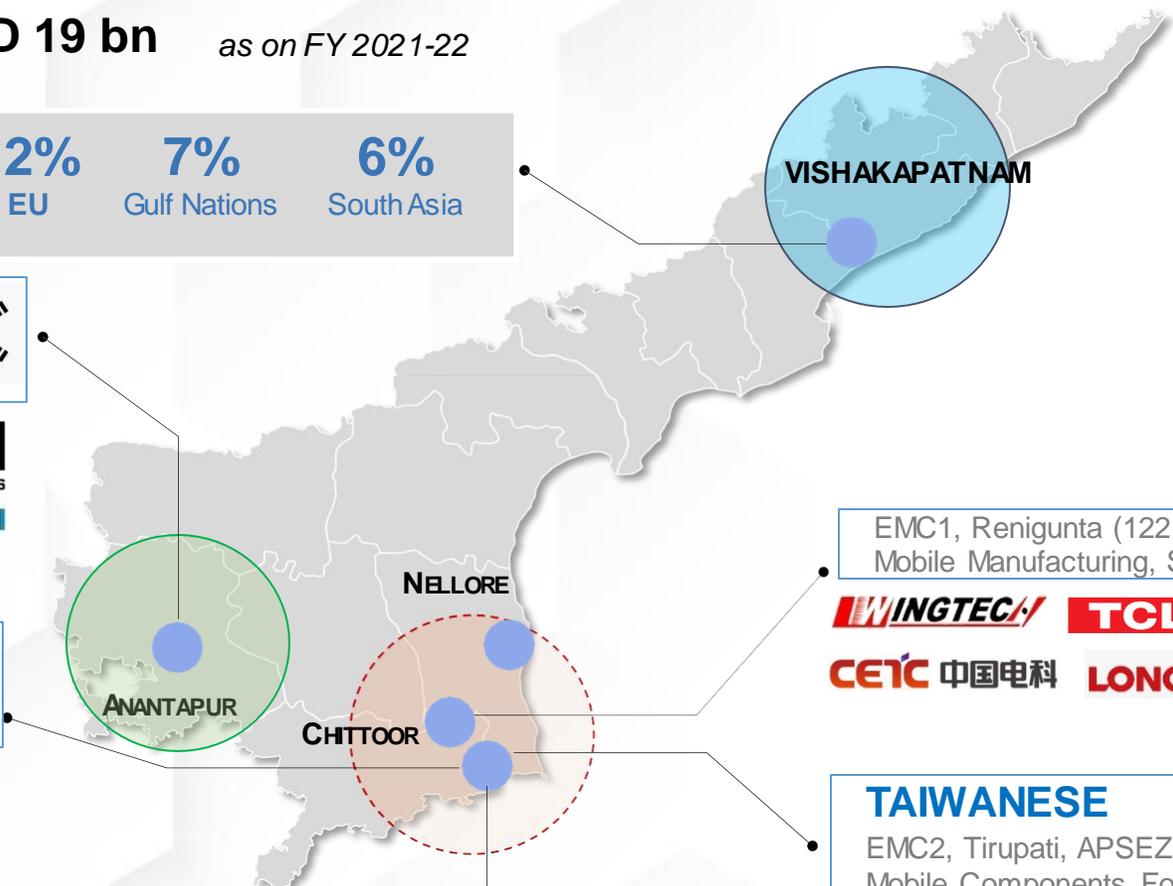
INVESTMENTS BY FOREIGN COMPANIES INTO AP



USD 4.5 Billion committed investment



70,000+ Employment generated



SOUTH KOREA
Anantapur, Automobiles & Auto Components, Chemicals

JAPAN - 30+ in JIT
Consumer Electronics, Automobiles, Machinery, Textiles

USA
FMCG, Industrials

EMC1, Renigunta (122 Acs), EMC2, Tirupati (501 Acs)
Mobile Manufacturing, Solar PV & Cell manufacturing

TAIWANESE
EMC2, Tirupati, APSEZ Naidupeta, Sri City
Mobile Components, Footwear, Auto Components



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Andhra Pradesh - Sector-specific policies



Industrial Policy

Industrial Development Policy 23-27



Industrial Parks

Mega Industrial Hub Policy 20-23



AP Retail Parks Policy 21-26



M-Parks Policy 18-23



Sector specific

Bulk Drug Park Policy '20



Information Technology Policy 21-24



Food Processing Policy 20-25



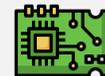
Electric Mobility Policy 18-23



Tourism Policy 20-25



Electronics Policy 21-24



Export Promotion

Export Promotion Policy 22-27



Logistics Policy 22-27



Renewable Energy

Pumped storage Power promotion policy '22



Renewable Energy export Policy 20-25





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Electronics



Food-processing



Pharmaceutical



Petroleum & Petrochemicals



Auto & Auto-components



Renewables

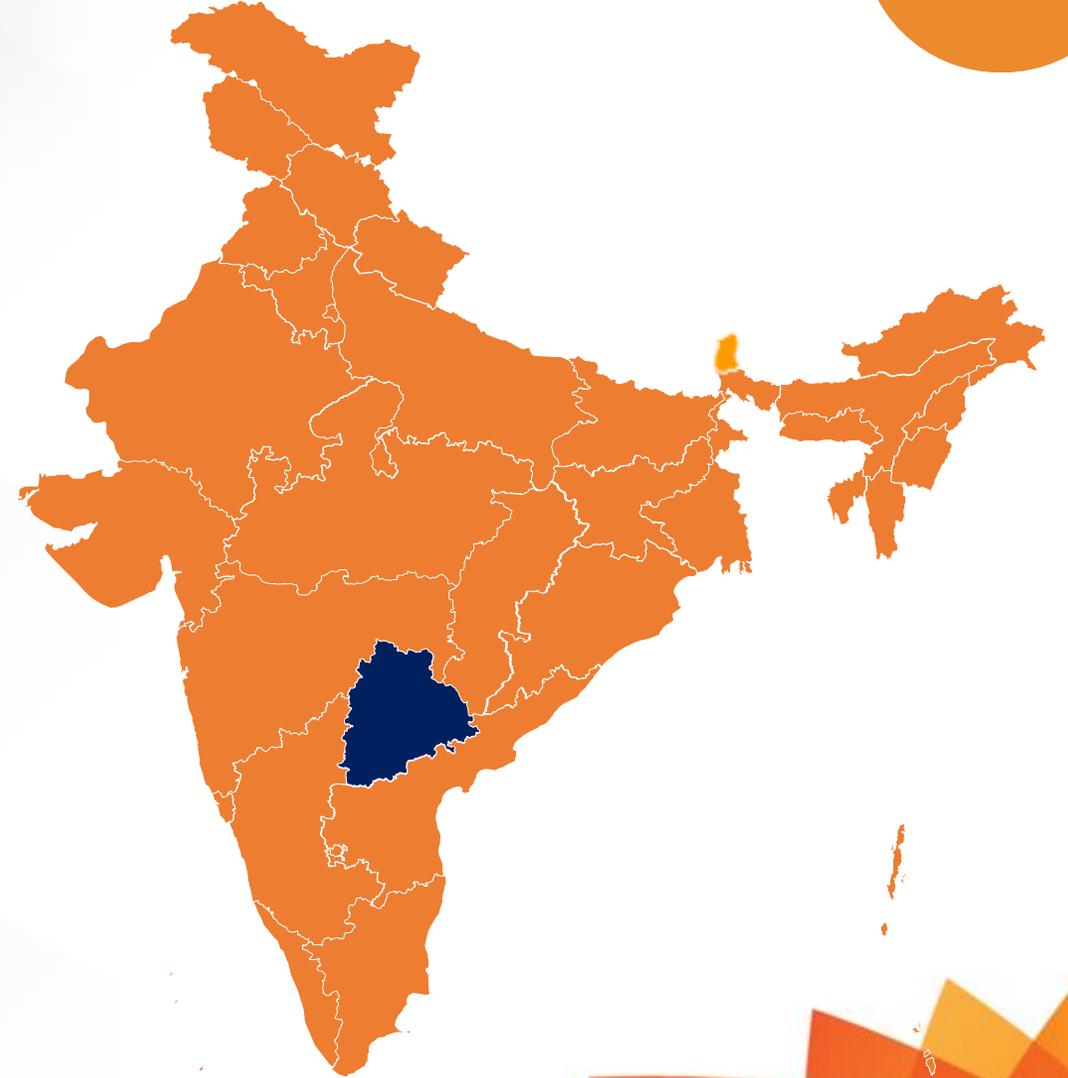




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Telangana





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Telangana | A Snapshot



**19.4 % GSDP
Growth Rate YoY
(2022 – 23)**
*3rd highest GSDP GR in
the country for General
States*



**USD 40 Bn
Investments**
in last 8 Years



**2.2 Mn
Jobs
Created**
(since 2014)



**Among Top 3
States in Ease
of Doing
Business
Ranking)**



**INR 3,17,000
Per Capita Income**
*Rs. 1.46 lakh
higher than the
national PCI
(Rs. 1.71 lakh)
growth rate in PCI*



**Home to 2.9 % of Indian
population, contributed
4.9% to National GDP
(2022-23)**
*Among Top ranked
contributing states to
India's GDP*

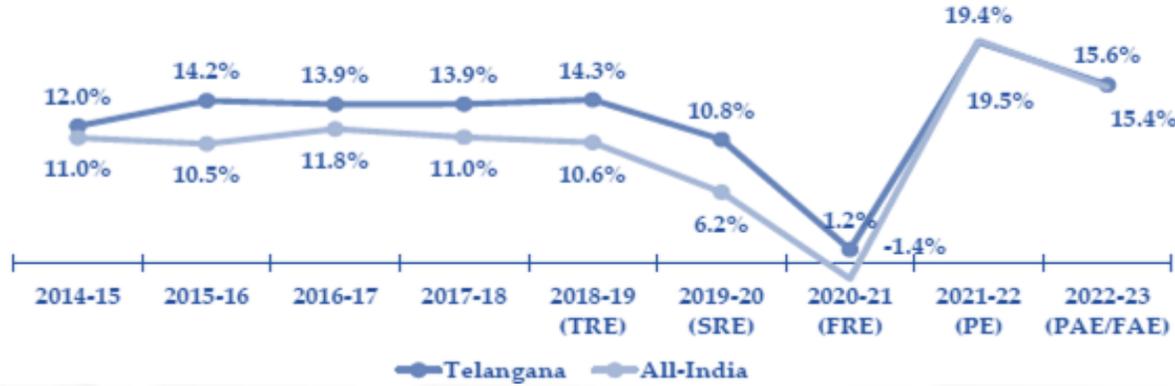


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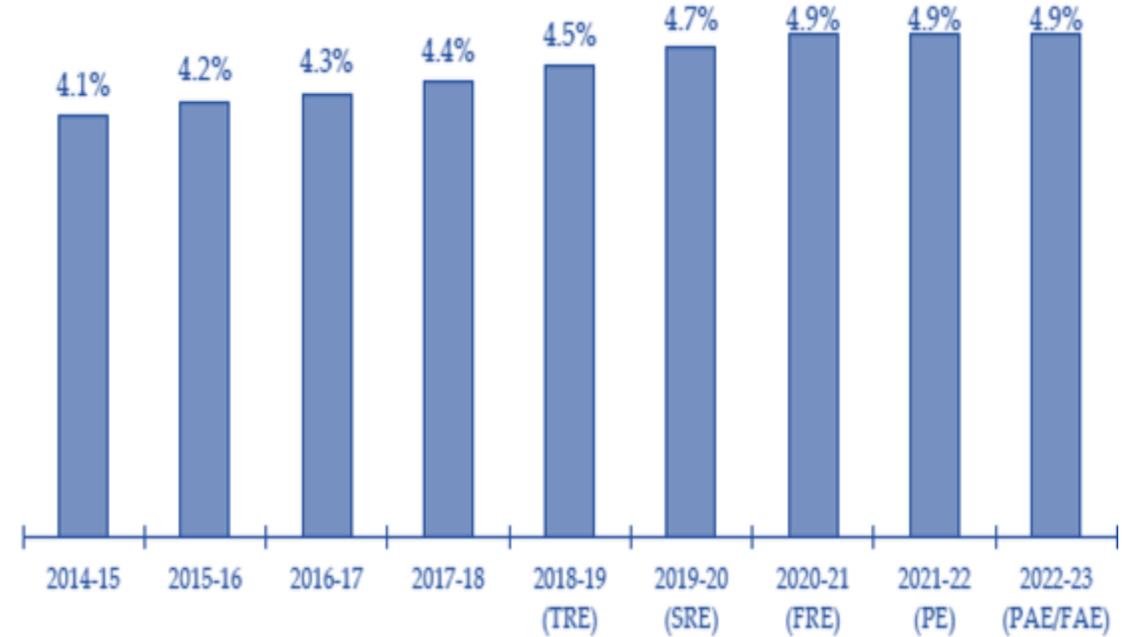
Telangana | Statistical Synopsis



Growth Rate of Gross Domestic Product at Current Prices for Telangana and India (2014-15 to 2022-23)

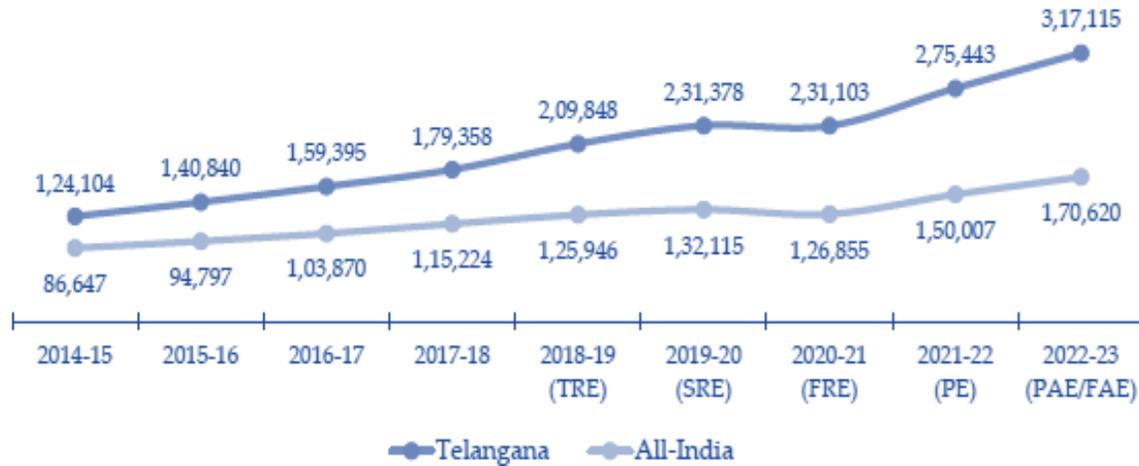


Contribution of Telangana's GSDP to India's GDP at Current Prices (2014-15 to 2022-23)



Source: Ministry of Statistics and Programme Implementation, Government of India

Figure 2.6 Per-Capita Income at Current Prices for Telangana and India (2014-15 to 2022-23)





Hyderabad | High Quality and Low Cost of Living

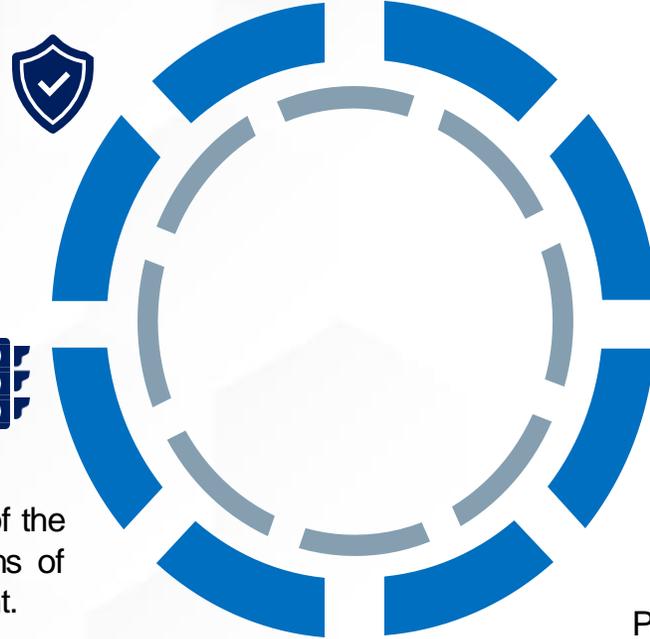


The "City of Pearls" - Hyderabad, is India's Most Livable Metro City

COST OF LIVING INDEX : 24.89

(When compared to New York value 100)

Hyderabad is best among metro cities



SAFEST CITY

The city offers best-in-class safety and security for women



AFFORDABLE RESIDENTIAL MARKET

Hyderabad had been consistently the most affordable residential market in the country.

– JLL's Home Purchase Affordability Index (HPAI)



CULTURE & HERITAGE

The city offers remarkable cultural diversity and inclusivity and is known for its cuisine, historical monuments other delights such as **traditional dance, fine arts and others**



Presence of **10+ golf courses** and **12 world-class stadiums**



Home for 2nd largest convention center in India (HICC)



27000+ Schools



900+ Hospitals



5000+ Diagnostic Centers



CITY TRAFFIC

Hyderabad is rated one of the best cities in India in terms of city traffic management.



Hyderabad ranked most dynamic city in India

– JLL City Moment report 2020

'Most Livable City' in India for the 5th consecutive year

– Mercer's Quality of Living Index



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Telangana | Vibrant Startup and Innovation Ecosystem



T-WORKS India's largest prototyping Centre with a vision to create and celebrate a culture of experimentation and innovation




T-Hub Innovation Campus : World's largest incubator ecosystem; transformed 1800 national and international startups in 5 years



Research and Innovation Circle of Hyderabad links research institutions, academia and industry along with VCs, angel investors and incubators and actively facilitates the process of taking their research to market



TELANGANA STATE INNOVATION CELL

Telangana State Innovation Cell:
An initiative by State Government for aspiring innovators, start-ups, and changemakers



Ideate. Implement. Inspire

Exclusive startup ecosystem for women entrepreneurs;
Facilitated 148 startups and raised INR 361 million



Innovation in Multimedia, Animation, Gaming & Entertainment (IMAGE)

Infrastructure & amenities to support the AVGC (animation, visual effects, gaming and comics) industry.

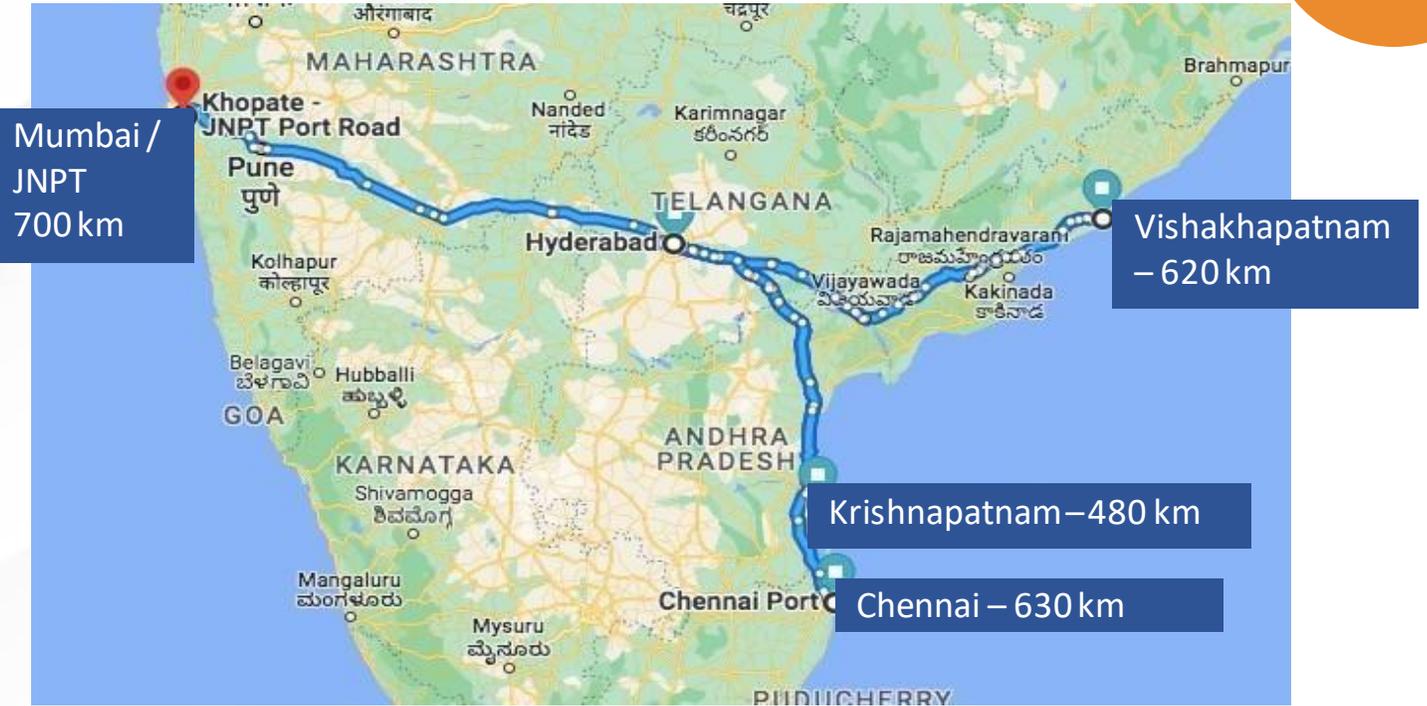
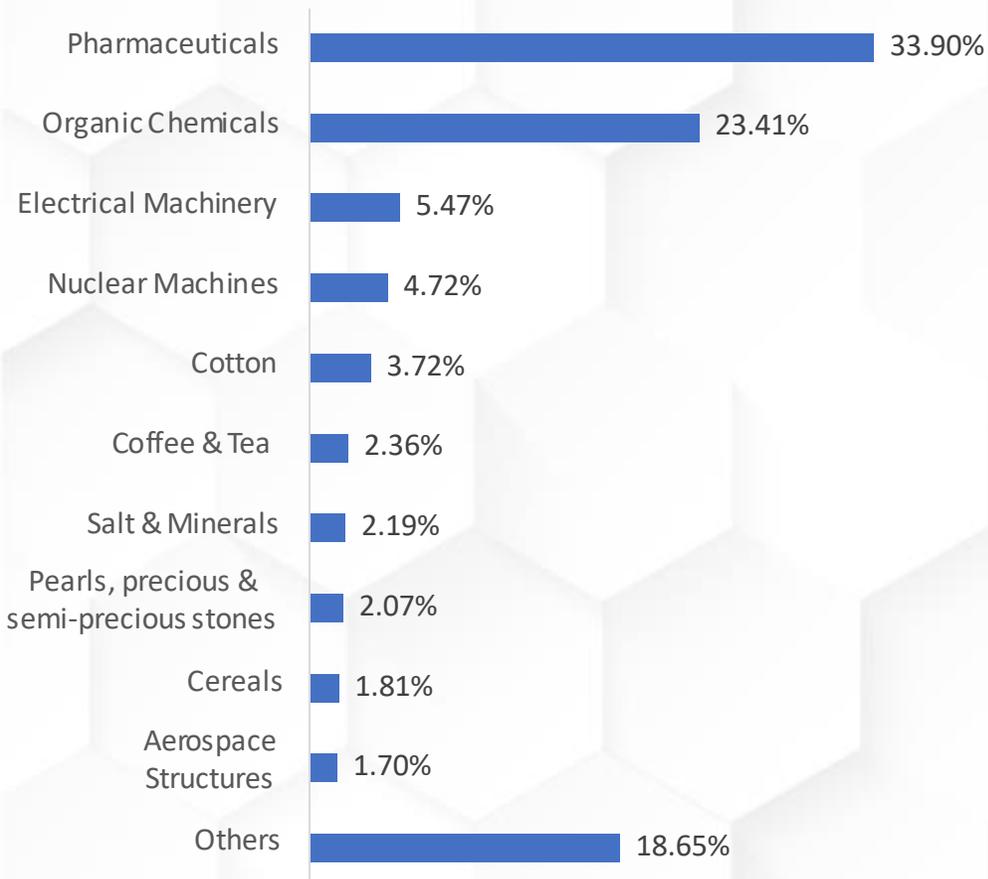


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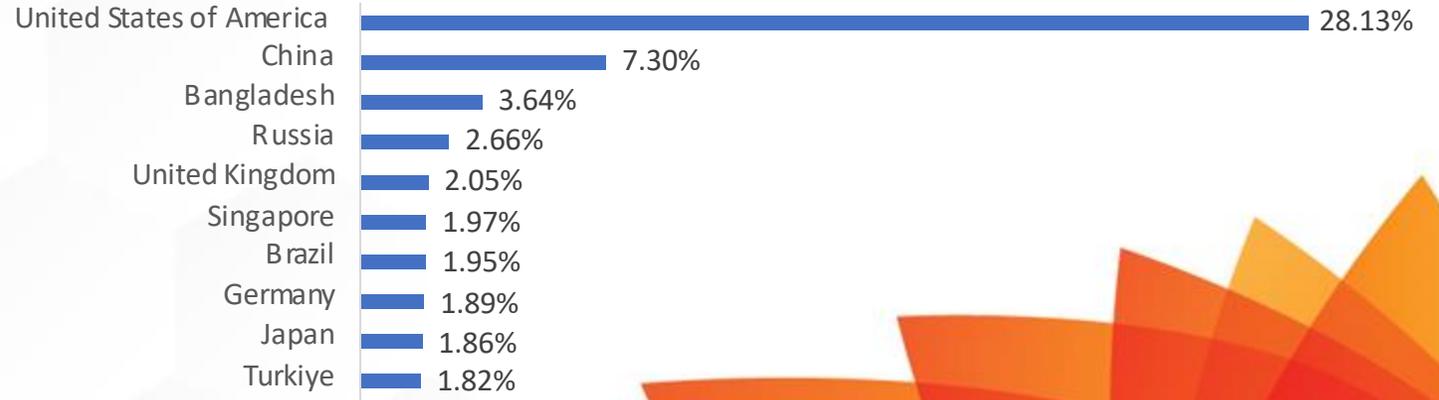
Telanga na | Trade & Connectivity



Share of Different Commodities in Telangana's Exports 2021-22



Top 10 Countries to which Telangana Exported 2021-22





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Telangana | Thrust sectors



14 thrust sectors identified for sustainable industrialization & economic growth of Telangana

 Life Sciences	 FMCG & Domestic Appliances	 Automobiles	 Power Sector & Renewable Energy
 Electronics & Semiconductors	 Engineering & Capital Goods	 Textiles & Apparel	 Minerals & Wood
 Aviation, Aerospace & Defense	 Gems & Jewelry	 Plastics & Polymers	 Transportation & Logistics
	 Food Processing	 Waste Management	

1st State to release Drones Framework

1st State to release Robotics Framework

1st State to release Blockchain Framework

1st State to release AI Framework

1st State to release AVGC Policy





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Telangana | Fiscal & Non-fiscal support



Incentive Structure for Investments

Non- Fiscal Support

Capital Subsidy

01

02

SGST Reimbursement

Interest Subsidy

03

04

Power Subsidy & Electricity Duty Exemption

Transport Subsidy

05

06

Land at Subsidized Rate / Lease Rentals Assistance

Stamp Duty Reimbursement*

1

Training of employees by TASK at no cost to the company

2

20% of land can be used to build dormitories for employees

3

State allows 03 shift operations for women

Mega Investment of >200crore or >1000 employees are eligible for customized incentives



Government of India

Summing up | Why Telangana



- Home to Who's Who of Global Life Sciences companies – 200+ USFDA approved sites – highest outside USA
- Houses second largest offices for Tech giants like Amazon, Microsoft and Apple outside their HQ
- World's largest Lift Irrigation Project (KLIP) to boost sector & inland fisheries sector
- Telangana has consistently ranked among the Top states in terms of 'Ease of Doing Business'
- Hyderabad is known for its multilingual diversity & culinary diversity
- Hyderabad has the lowest attrition rate among Indian metro cities – 'Loyal workforce'



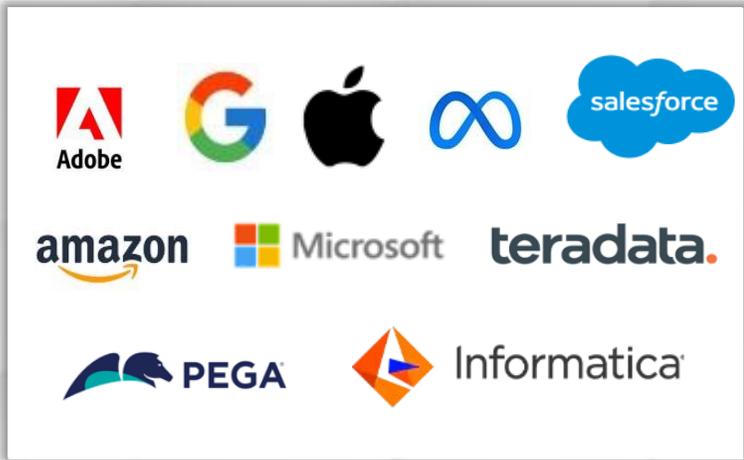


Government of India

Top Sectors in Telangana



Tech and Enterprise Software



₹ BFSI



Lifesciences and Healthcare



Aerospace and Defense



Automotive



Technology Service Providers





Government of India



Odisha



30th August 2023





Come, Join the Juggernaut

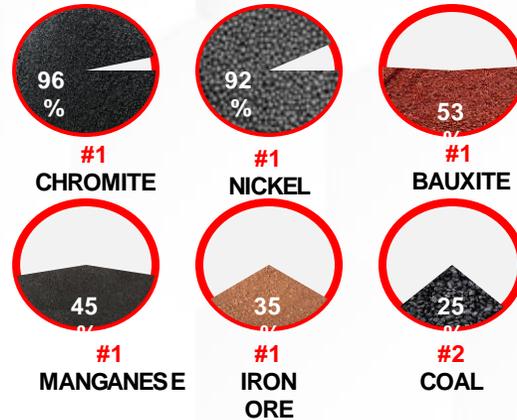


No. 1 in

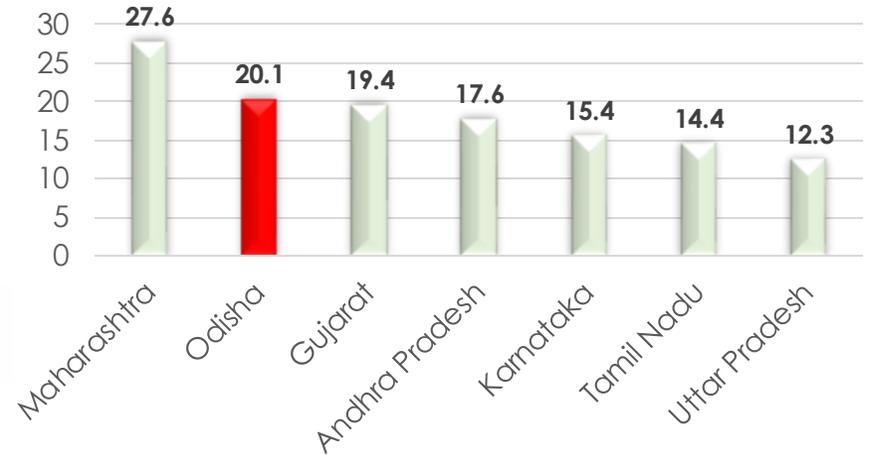
No. 2 in

In attracting higher ongoing investment in FY'23

Source of Minerals: Mineral Ore Availability



Producer of Steel, Stainless Steel, Aluminium, Alumina



3.45%

One of the lowest fiscal deficits among Indian states

11.5%

One of the fastest growing economies in India





Government of India

Odisha as an Investment Destination



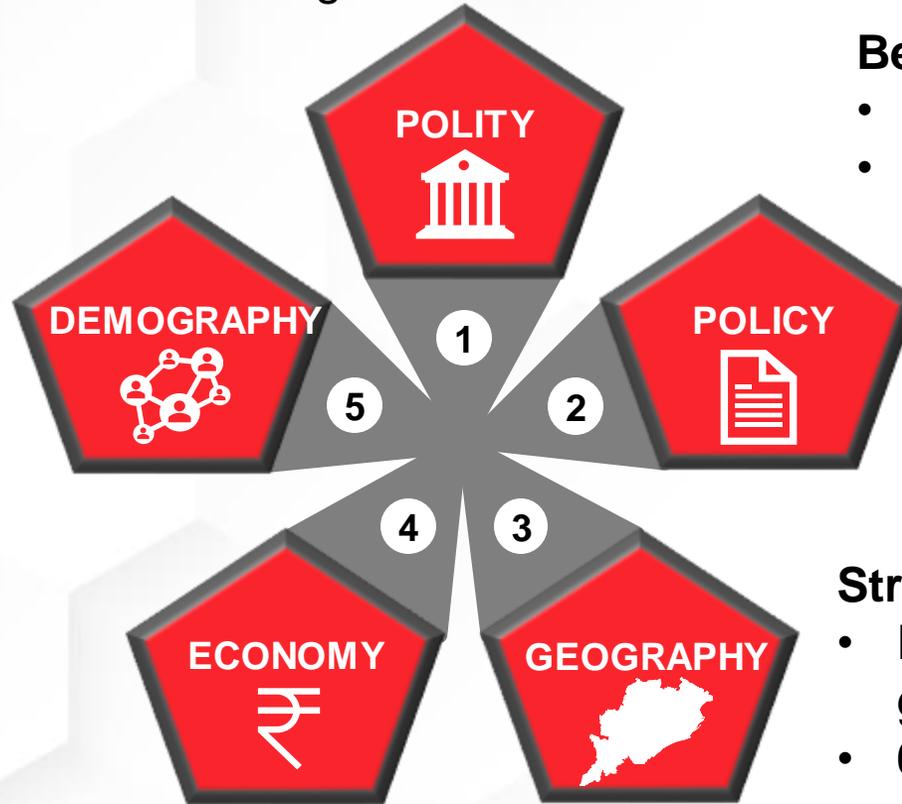
23+ years of

- Political stability
- Progressive governance

Skilled in Odisha

- Abundant Labour Force
- 197 Colleges and 950+ Industrial Training Institutes
- Presence of World Skill Centre

Fiscally strong and economically resilient



Best-in-class policy incentives

- Dedicated Industrial Policy Resolution
- Sector-wise policies driving growth

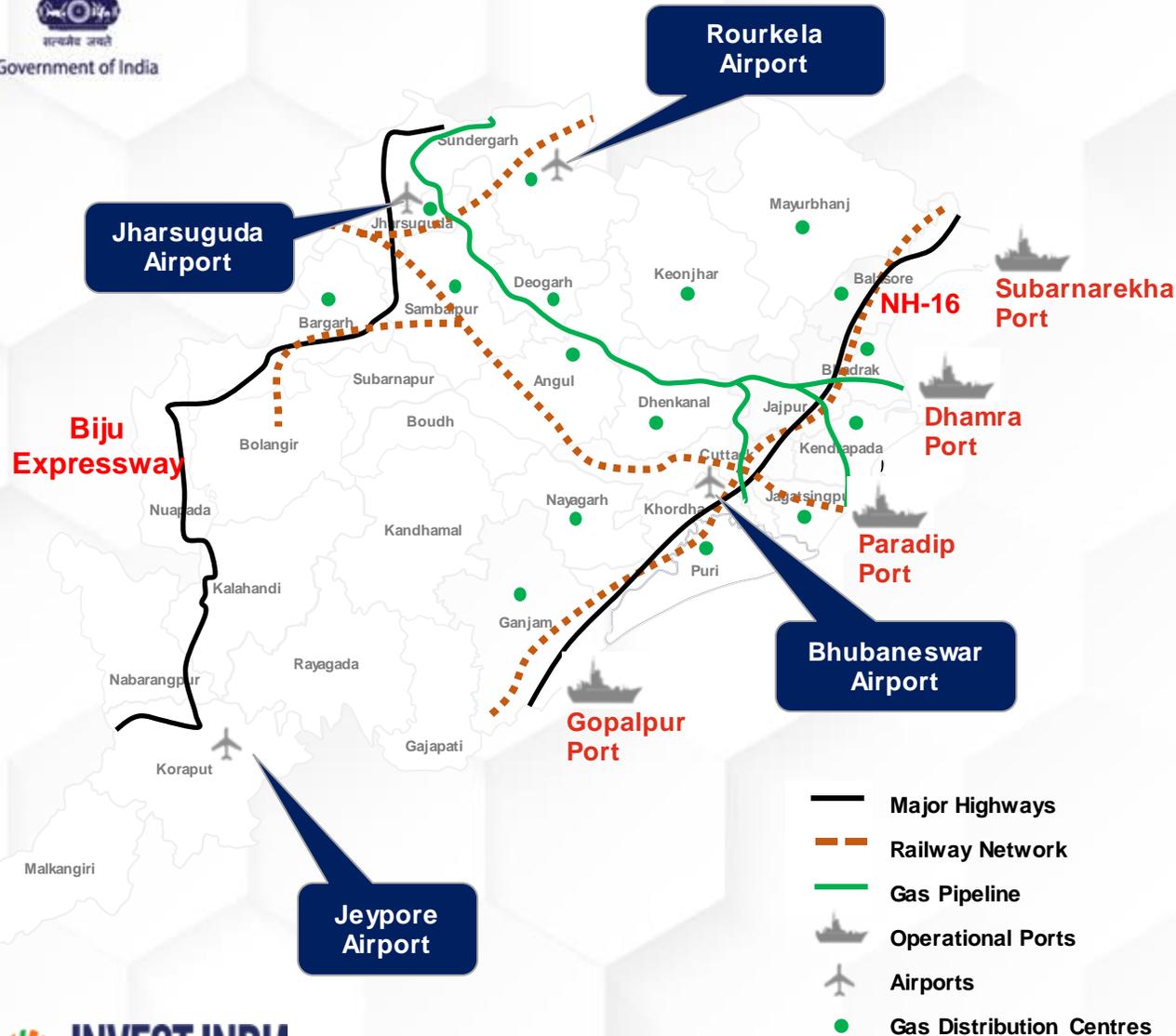
Strategically Positioned

- East and Northeast India fastest growing markets
- 6 hours from 50% of the World's economy



Government of India

Best-in-class Infrastructure Support



125000+ acres of industrial land

126 Industrial Estates and Parks

- ❖ Infovalley EMC, Bhubaneswar
- ❖ Infocity SEZ, Bhubaneswar
- ❖ Sea Food Park, Bhubaneswar
- ❖ Plastics Park, Paradeep
- ❖ Technical Textiles Park, Bhadrak
- ❖ Aluminium Park, Angul
- ❖ PCPIR, Paradeep
- ❖ NIMZ, Kalinganagar
- ❖ Dhamra Investment Region
- ❖ Gopalpur Industrial Park, Ganjam
- ❖ Aluminium Park, Jharsuguda
- ❖ Mega Food Park, Bhubaneswar

Key Industrial Parks and Regions



INVEST INDIA
NATIONAL INVESTMENT PROMOTION & FACILITATION AGENCY



Government of India

Extensive Logistics Connectivity



Road Connectivity

- **10,000+ km** Highway Network
- Industrial development along NH16 and Biju Expressway

Extensive Railway Network

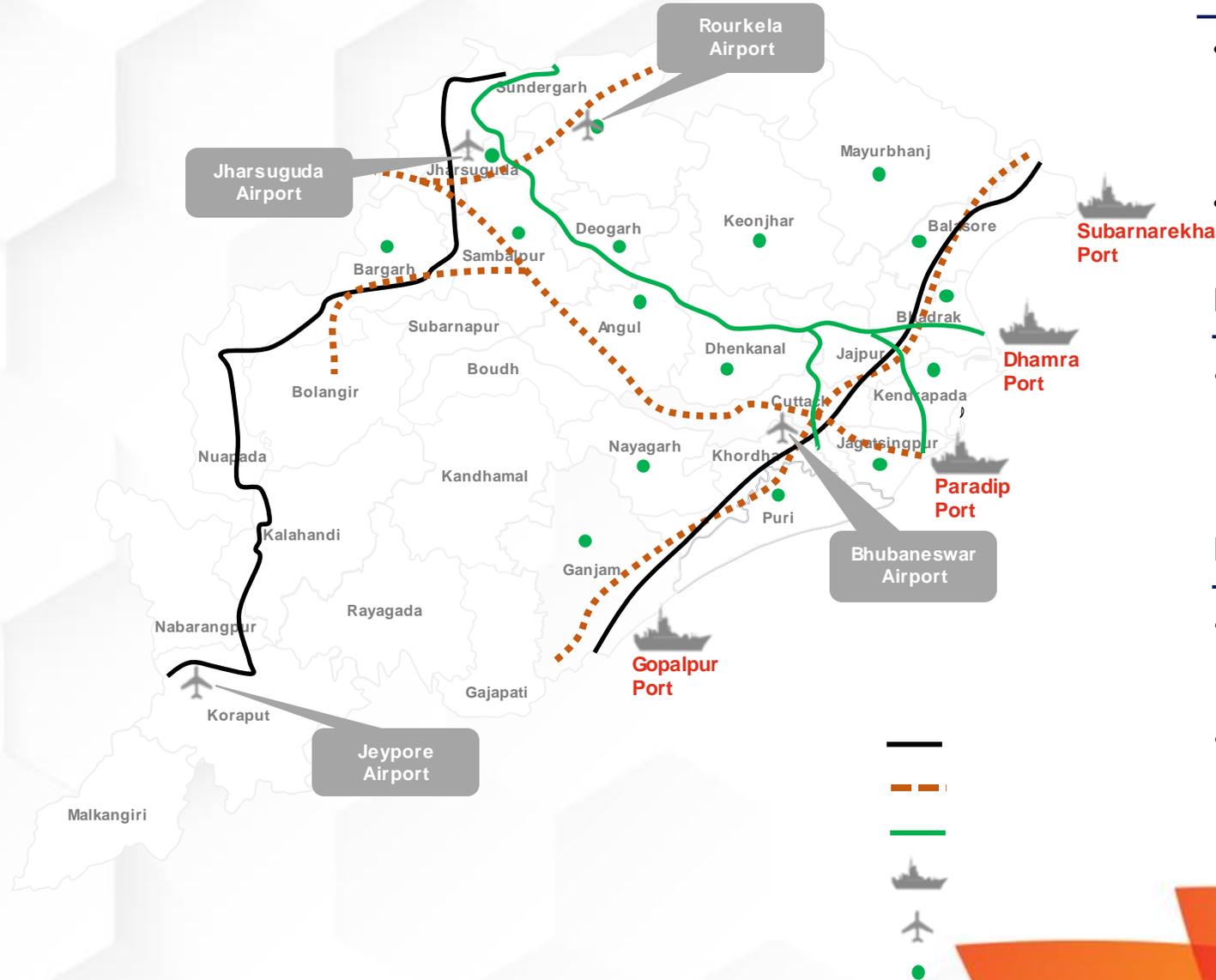
- **Railway sidings** available near all major industrial zones.
- **East Coast Railway** passes through industrial regions.

Inland Container Depots

- **3 ICDs** at Kalinganagar, Balasore and Jharsuguda

Airports

- **Bhubaneswar**
- **Jharsuguda**
- **Jeypore (Koraput)**
- **Rourkela**



Gas Pipelines

- Natural gas pipeline to **cover 13 districts** and **connect major industrial clusters**
- **LNG Terminal** at Dhamra

Inland Waterways

- Upcoming **National Waterway 5 (NW-5)** covers 532 km

Major Ports

- **Existing 3 ports:** Paradip port, Dhamra Port and Gopalpur.
- **Upcoming:** Subarnarekha Port, Mahanadi Riverine Port



Government of India

Strategic Location



Gateway to the ASEAN Region

6 Hours to

50% Of the World Economy

100 cities with a population of over 1 million

- **Easy access to the domestic Indian market** via excellent rail and road connectivity
- **Proximity to Southeast Asian countries** and the presence of multiple ports confer unique comparative advantages



Government of India

Policy Support and Industrial Facilitation

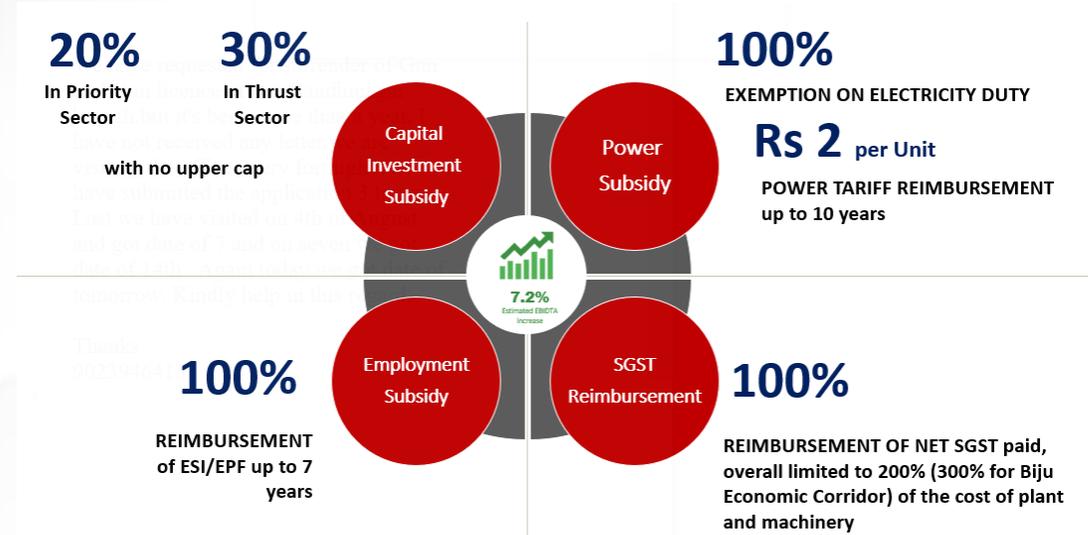


GO SWIFT

Government of Odisha - Single Window for Investor Facilitation and Tracking

- 54+ clearances from 18 departments
- Single Application Form
- Unified payment gateway
- Integrated with National Single Window System

Industrial Policy Resolution 2022



Emerging as Leaders in the following sectors



Textile and Apparel



Food Processing



Electronics and IT



Green Energy Equipment & Green Hydrogen



Tourism



Metal Alloys and Downstream

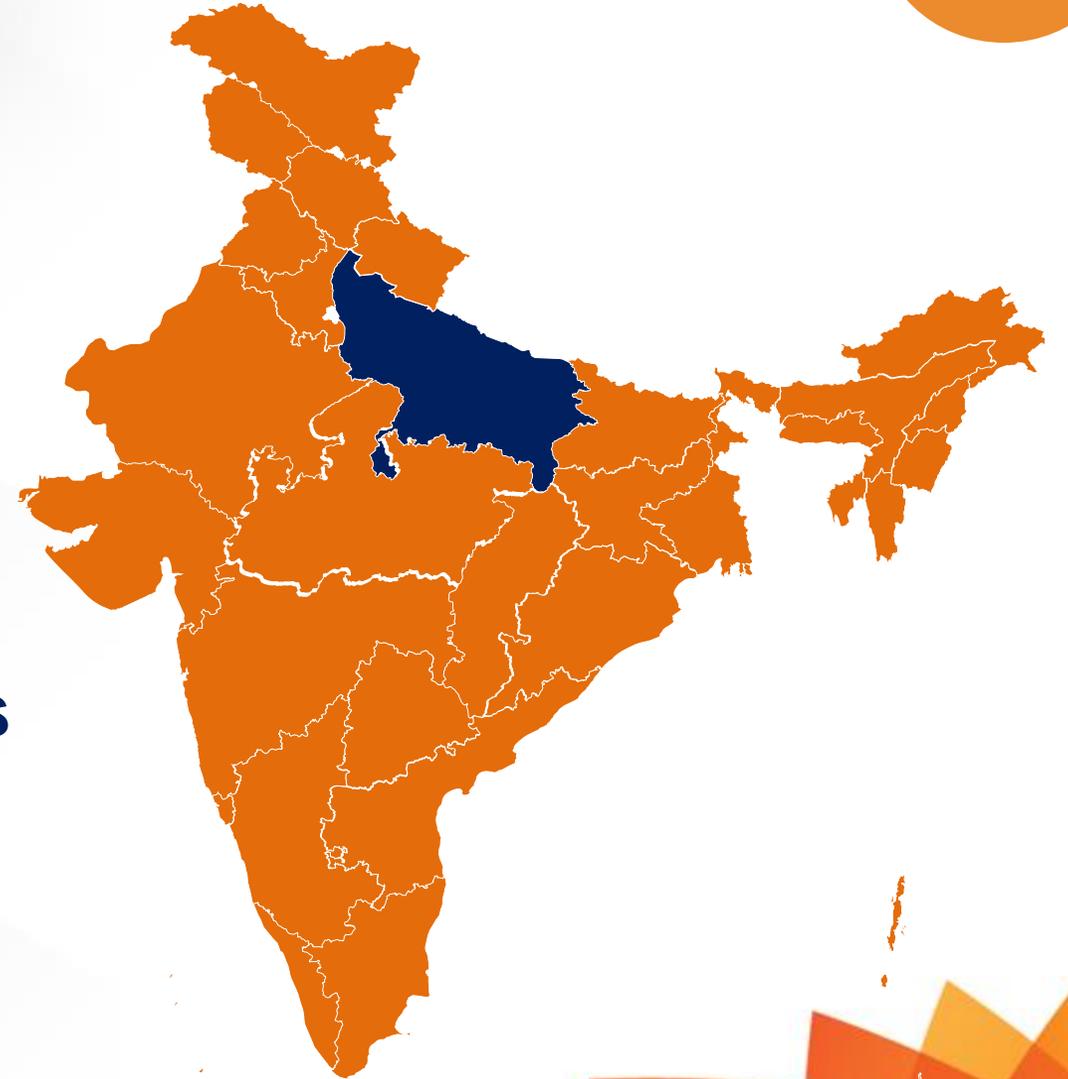


सत्यमेव जयते
Government of India



Uttar Pradesh

Investment & Trade Opportunities





Government of India

Resilient and Developing Economy

The economic momentum of UP is well-poised to continue on a higher trajectory



~INR 19 lakh

Economy size in 2021-22

8% of India's GDP and among five economically largest states

12.9%

Share of Export

Rank in exports consistently within top 5 states since 2016-17

10.9%

Robust growth (2014-20)

Higher than India's growth of 10% in the same pre pandemic period

240 Mn

Large Consumer Base

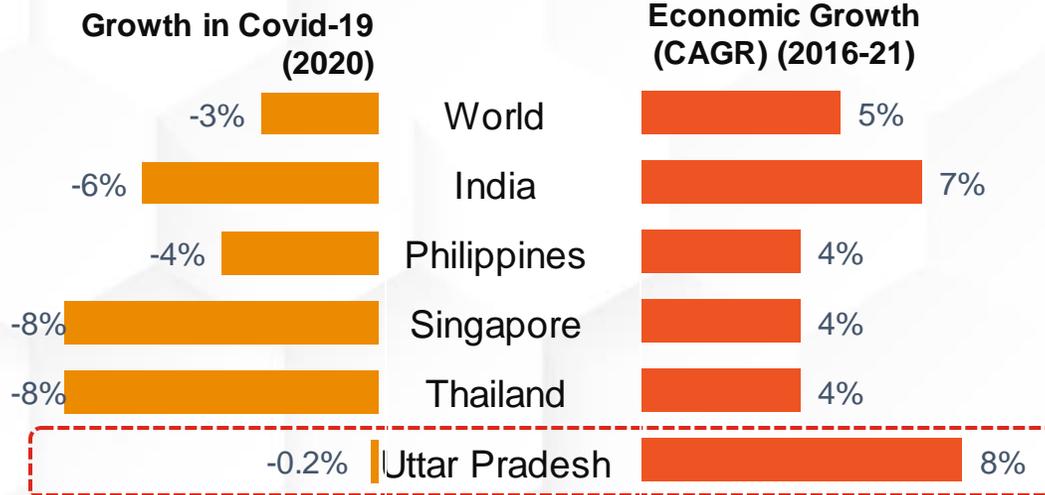
3.33% global working population; largest consumer base & work force of India

4x

Increase in Capital Outlay

Government focus on development over last decade (2012-22)

UP remains an oasis of growth amongst slowing global outlook



UP decelerated at a lower rate than India & select countries showing resilience in Covid

UP receives record breaking investment intents

UP Global Investor Summit 2023

~INR 33.5 lakh Cr

Total Investment Commitment; >19000 MOUs

~94 lakh

Proposed Employment

Uttar Pradesh giving momentum to India's growth story...



Government of India

Robust Manufacturing & Services Ecosystem Across Key & emerging sectors



<p>Agriculture and allied</p> <ul style="list-style-type: none"> ▶ Food basket of India ▶ Highest national output in mango, Indian gooseberry, sugarcane, potato, wheat, and total horticulture ▶ Key players- Pepsico, Unilever, ITC 	<p>Information Technology</p> <ul style="list-style-type: none"> ▶ IT Hub of North India; 15 operational IT parks; 1 upcoming; 3 being developed ▶ Noida has emerged as Global data center hub, country's largest data center in Noida ▶ Key players- Microsoft, IBM, YOTTA, NTT 	<p>Animal Husbandry & Dairy</p> <ul style="list-style-type: none"> ▶ Largest exporter of processed frozen meat in India ▶ Highest national output in milk ▶ 3rd in India in inland fish production
<p>Renewable Energy</p> <ul style="list-style-type: none"> ▶ Vast scope in Waste to Energy as UP is the largest producer of sugarcane and 2nd largest producer of rice in India ▶ Solar Energy: 6 solar parks approved with a total capacity of 3600 MW ▶ Key Players- Sael Energy, Amplus 	<p>Logistics & Warehousing</p> <ul style="list-style-type: none"> ▶ Top ranked State – Achiever Category (90% above) and 6th position in LEADS Ranking 2021 ▶ Industry status to warehousing & logistics ▶ 1st Inland Waterway of India; 1st Multi Modal Terminal of India at Varanasi 	<p>Tourism</p> <ul style="list-style-type: none"> ▶ 2nd highest domestic tourists; 3rd highest foreign tourists' footfall in India ▶ Home to one of the 7 Worlds of Wonder- Taj Mahal ▶ Biggest film city of the country coming up ▶ Key Players- Marriott, ITC Hotels, Hyatt
<p>Electronics Manufacturing</p> <ul style="list-style-type: none"> ▶ Largest exporter of consumer electronics in India; 65% of mobile phone manufactured, 37% of mobile handset manufacturers ▶ 196 ESDM companies presently operates ▶ Key Players- Samsung, Haier, OPPO, Dixon 	<p>Education</p> <ul style="list-style-type: none"> ▶ ~144 Mn (~60% population) in the age group of 0-24 years ▶ Noida is the Hub of Edtech companies 	<p>Pharmaceuticals</p> <ul style="list-style-type: none"> ▶ 17% market share of national pharma sales ▶ 354 formulation units, 38 bulk drug units, 54 cosmetic units, 22 medical devices ▶ Key Players- Schwabe, Anandita, TEVA, Romsons, GP



Government of India

Key Enablers

Business-friendly environment with an enabling policy framework, robust infrastructure and well-established systems & processes



Single-window mechanism: time-bound approval and real-time tracking

Robust logistics ecosystem: dedicated expressways / freight corridors across the state

Improved law and order situation: police force modernization, technology adoption

Policy enablers

- 1 **New Industrial Policy 2022**
Multiple subsidy options with wider project coverage & investment, inclusion of emerging sectors (like green hydrogen, circular economy)
- 3 **Top-up on Production-Linked Incentive scheme (PLI)**
Subsidy top-up on Government of India PLI scheme, up to 50% special top-up for sectors like ESDM

- 2 **20+ New/ Amended Sectoral policies**
Specific benefit for investors in EV, ESDM, Energy, Pharma, Textiles, Aerospace & Defence, Tourism, Food Processing, Infra, Tourism, IT, Startup, MSME sector
- 4 **Nivesh Sarathi**
Dedicated one-stop portal managing each stage of investor lifecycle (from intent to investment grounding)





Government of India

Policy Framework

Enabling Business Environment



Industrial Investment & Employment Promotion Policy 2022

Mutually exclusive options to cover wider category of projects under fiscal incentives program

- Capital Subsidy up to 42% of Eligible Capital Investment
- Net SGST reimbursement up to 300% of Eligible Capital Investment
- 30% top- up on incentives received under PLI up to 100% of Eligible Capital Investment



Incentive for **R&D projects, Intellectual Property Rights & Centers of Excellence**



Incentive for **Infrastructure projects - Pumped Storage Projects** & open for adding new



areas Investment period of up to **9 years**



Case-to-case basis incentives for Ultra Mega category projects of special importance



Government of India

Policy Framework

Enabling Business Environment



25 + Sector Specific Policies

Defence & Aerospace Manufacturing
Electronics Manufacturing
Civil Aviation
Maintenance, Repair & Overhaul (MRO)
EV Manufacturing Policy
Warehousing & Logistics
Pharmaceutical
Information Technology
Data Centre
Solar Policy
Export Promotion Policy
Medical College (PPP)

Agri-export Policy
Food Processing
Start-up
Bio Energy Policy
Handloom & Textile
Tourism Policy
Integrated Township Policy
Solid Waste Management
Film Policy
MSME Policy
Milk
Poultry

Attractive Incentives Offered

- Land Rebate
- Capital Subsidy
- SGST Refund
- Capital Interest Subsidy
- Infrastructure Interest Subsidy
- Stamp Duty exemption
- Electricity Duty Exemption
- EPF reimbursement
- Transportation subsidy
- R&D incentives
- Skill Development Subsidy

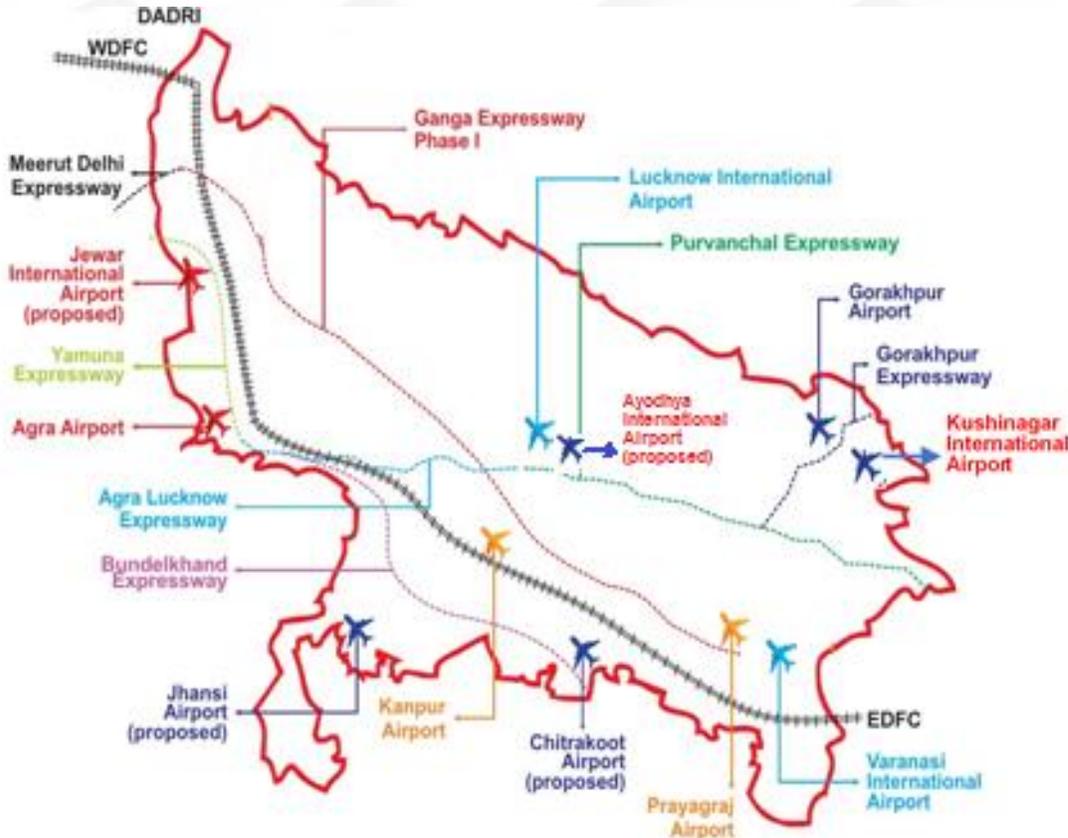




Government of India

Infrastructure Giant

UP is #1 State in quality and reliability of infrastructure, aiming to accelerate economic growth and enhance the quality of life of its young and vibrant population.



- ▶ Rank # 1 in terms of network of Expressway in the country
- ▶ Dedicated Freight Corridors (EDFC with highest catchment area & WDFC) in the State

Best-in-class infrastructure with connectivity to industry and economic hubs in India

- 2nd largest network of roads (> 400,000 kms)
- Largest railway network (> 16,000 kms)
- One of the largest number of airports (9 operational and 7 under construction)
- Highest number of international airports (3 Operational @ Lucknow, Varanasi, Kushinagar and 2 Under Construction @ Noida, Ayodhya)
- Vast and network of **Rapid Transport Systems** (3 metro rail networks operational, 9 planned)
- First **Rapid Rail Transport System** in India (Delhi to Meerut is under construction)
- 1st to have **multi modal waterways terminal** on river ganga (5 freight villages planned)



Government of India

Investment Facilitation Portals

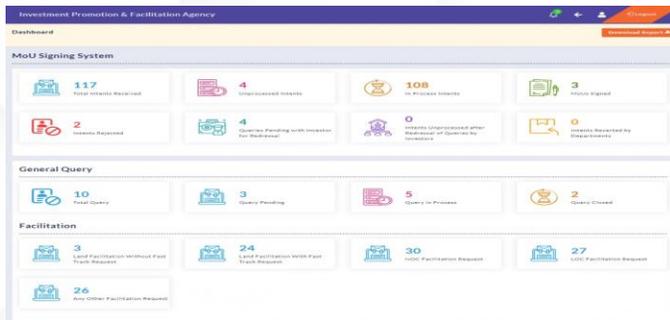
Brief Overview



Investor Relationship Management System

Nivesh Sarathi

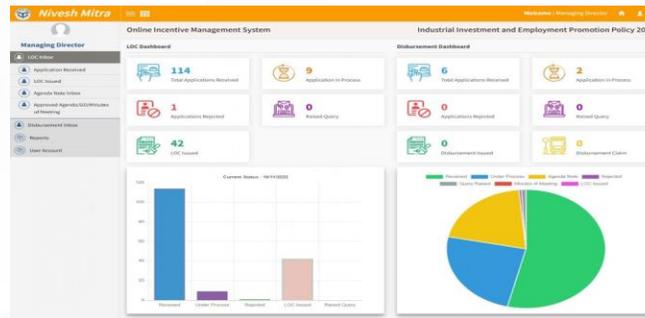
One stop solution across investment lifecycle, starting from intent / MoU to investment grounding: interactive, query / resolution; seeking facilitation support and real-time monitoring



Incentive Facilitation System under Nivesh Mitra

Online Incentive Management System

Online incentive management system for processing, sanctioning and disbursement of incentives, with scope for real-time monitoring of disbursement status



Single Window Investor Facilitation

Nivesh Mitra

To provide NOCs/Clearances/Licenses including Renewals required for setting up (Pre-Establishment) & running (Pre and Post Operation) a business





Government of India

Overview of UP's export basket

UP is the 5th largest state in India in terms of exports



The top 10 sectors contribute to ~70% of Uttar Pradesh's exports

Commodity description	UP's exports (USD Mn)	% share
Electricals & electronics	3,974	18.9%
Apparels	2,012	9.6%
Meat & edible offal	1,951	9.3%
Leather goods & footwear	1,333	6.3%
Articles of Iron & steel	880	4.2%
Mechanical machinery	849	4%
Aluminum & its articles	762	3.6%
Auto-components	757	3.6%
Carpets	734	3.5%
Cereals	717	3.4%
Others	7,065	33.6%

Based on a study of UP's export capabilities, GoUP has identified 15 priority sectors in goods trade and 5 champion services sectors for driving growth of exports

Goods Focus Sector-

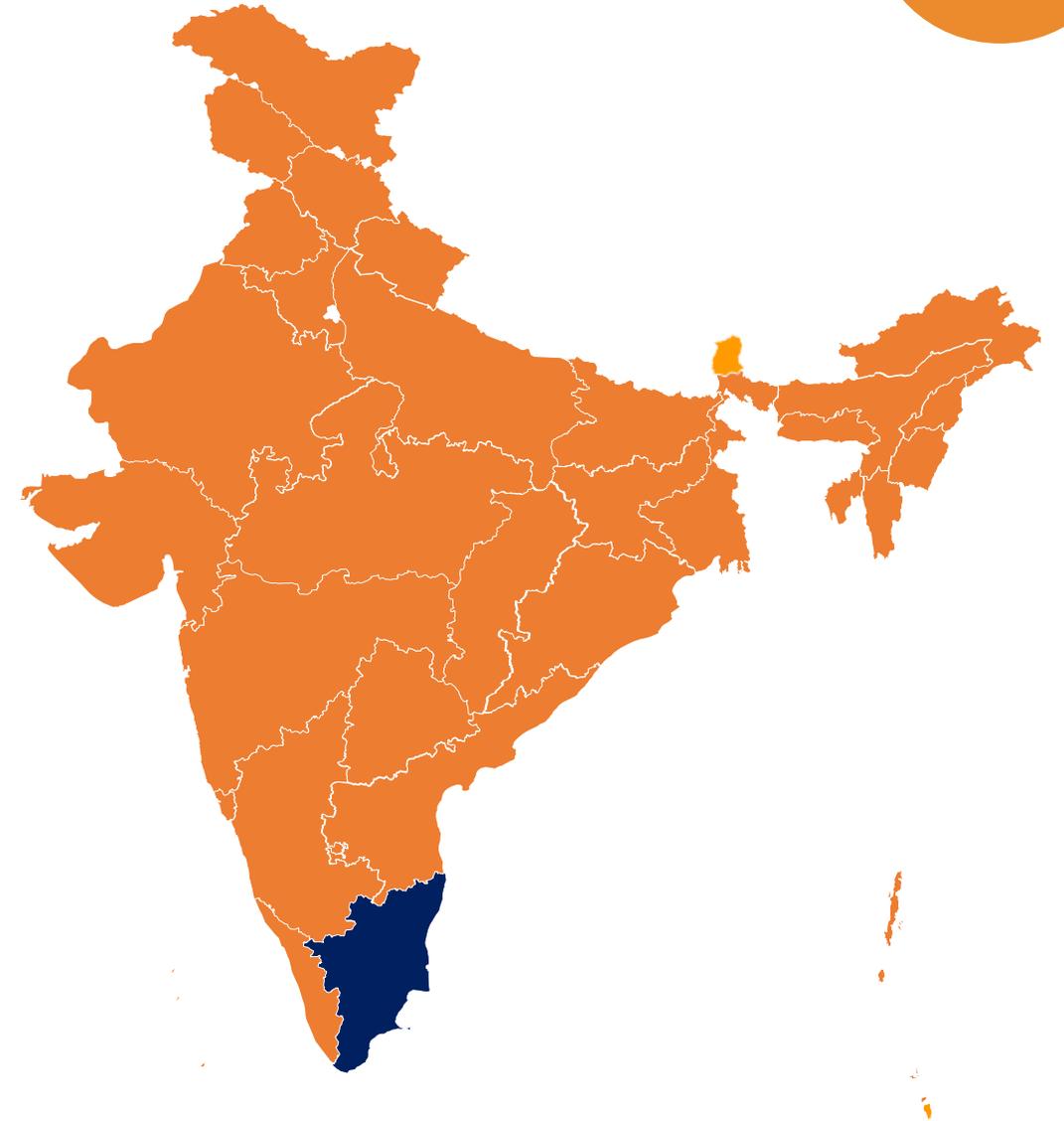
Organic Chemicals, Essential Oils & Perfumes, Leather & Leather Products, Carpets, Apparels, Ceramics, Glass & Glassware, Gems & Jewelry, Articles of iron & steel, Machinery & Equipment, Electronics & Electrical Equipment, Vehicles & Auto-Components, Furniture, Sports Goods & Handicrafts

Service Focus Sectors-

IT & ITeS, Tourism & Hospitality, Medical Value Travel, Education Services, Transport & logistics



Tamil Nadu



30th August 2023



Number of Operational
Special Economic
Zones in India

Human Capital
National Innovation
Index

Tamil Nadu

Tamil Nadu: Key Accomplishments

Annual Turnout
Of Skilled
Manpower in India

Women Workforce in
India

India's Most Urbanised
State



Sustainable Development Goals
- National Index (2020-21)

Knowledge Diffusion
National Innovation Index

Public Affairs
Index 2020

Job Creation under
IBPS Scheme



Government of India

Tamil Nadu - The Industrial Powerhouse



Infrastructure

Land

- o **19,237 hectares** of land available for Industries
- o **Highest number of Operational SEZs (50)** in India

Water

- o Ample water supply from Perennial & Non-perennial sources
- o Further backed by about **290 MLD** of **TTRO** water for Industrial use

Power

- o Power Surplus State with an installed capacity of **33.6 GW**
- o Abode to most popular sources of Sustainable Energy with an installed capacity of **17 GW**

Connectivity

- o **6** Airports including **4** International Airports
- o **4** Major & **19** Minor Seaports



Ecosystem

Industrialization

Home to about **39,000+** Industries

Urbanization

Over **50%** of the State is Urbanised

Industrial Corridors

- o Tamil Nadu Defence Industrial Corridor
- o Chennai-Bengaluru Industrial Corridor
- o Chennai-Kanniyakumari Industrial Corridor
- o Kochi-Coimbatore-Bengaluru Industrial Corridor

Industrial Parks

- o **57+** Operational SEZs
- o **24** State Owned SIPCOT Industrial Parks
- o **30** Private Industrial Parks
- o **120+** SIDCO Industrial Parks
- o **10+** million sq. ft. Plug & Play Facilities



Market

Market Access

Gateway to India's **USD 3 Trillion economy** & a market for 8 Billion Consumers

Connected to **Global Supply Chains and Markets** making it an ideal Global Export Hub



Talent Pool

1st in India in Annual turnout of Skilled Manpower

Home to **32** of India's top **100** Colleges

1 million Graduates annually

Marching Towards a USD 1 Trillion Economy



Government of India

Tamil Nadu - Focus Sectors





Government of India

Tamil Nadu - Sunrise Sectors





Government of India

Infrastructure

Tamil Nadu has a robust infrastructural connectivity to cater to the demands of national and international market.



Railways

5,932 kms of Track &
532 Railway Stations



Roadways Highest in India

- **286 kms/Lakh** of Population
- **137 kms/100 sq.km**



6 Airports

International* 

Domestic* 

0.4 MMT **12.7 Mn**

0.1 MMT **4.6 Mn**

540 Weekly International Flights

1850 Weekly Domestic Flights



4 Large Commercial Seaports

Volume Handled

- Over **3 million** TEUs*
- Over **70 million** MT Bulk Cargo*





Government of India

Tamil Nadu Industrial Policy (TNIP) 2021 Overview

Investment Promotion Subsidy (Three Possible Options)

Fixed Capital Subsidy

or

Flexible Capital Subsidy

or

Turnover-Based Subsidy

- o 10% to 20% of investments in EFA for investments > 500 cr in "A" districts
- o 10% to 25% of investments in EFA for investments > 300 cr
- o Disbursal in equal annual instalments over 10 to 15 years based on investment & district category

- o Up to 35% of investments in EFA for "A" districts
- o Up to 37% of investments in EFA for "B" districts
- o Up to 40% of investments in EFA for "C" districts
- o Subsidy calculation is based on the location, employment, exports, ecosystem creation & sector to be disbursed over 2.5 times the investment period

- o 1.5% to 1.8% of turnover for investments in Mega projects
- o 1.75% to 2% of turnover for investments in Ultra-Mega projects
- o Cap of 4% of cumulative investment in EFA per annum for a period of 10 years

Support in the form of other incentives

Land cost subsidy
10% to 50% rebate in land cost

Stamp Duty Reimbursement
Up to 100%

Training subsidy
USD 450 per month per worker

Quality certificate incentive
50% incentive

Imported Machinery
Treatment of 2nd hand machinery as asset

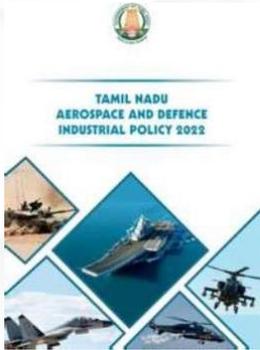
R&D training
USD 1500 per annum per worker

Transport subsidy
75% of the cost towards capital goods

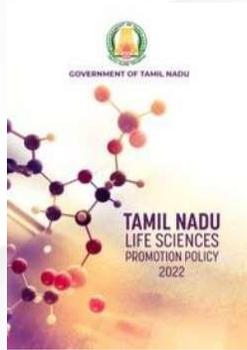


Government of India

Policy Ecosystem



*Tamil Nadu
Aerospace & Defence
Industrial Policy 2022*



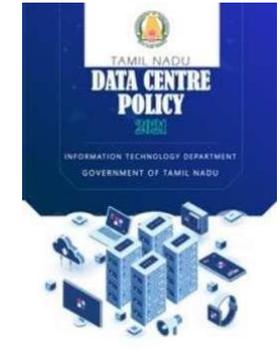
*Tamil Nadu
Lifesciences
Promotion Policy
2022*



*Tamil Nadu FinTech
Policy 2021*



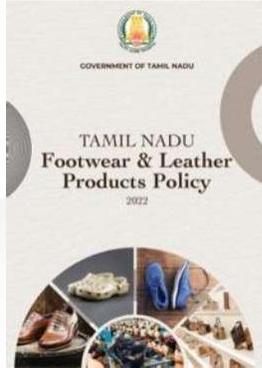
*Tamil Nadu Startup &
Innovation Policy 2018-
23*



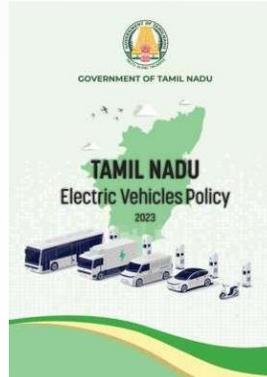
*Tamil Nadu Data
Centre Policy 2021*



*Tamil Nadu R&D
Policy 2022*



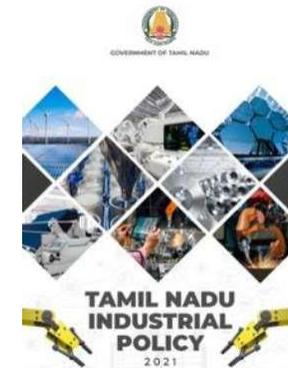
*Tamil Nadu Footwear &
Leather Products
Policy 2022*



*Tamil Nadu Electric
Vehicles
Policy 2023*



*Tamil Nadu Electronics
Hardware Policy 2020*



*Tamil Nadu Industrial
Policy 2021*





Kerala



30th August 2023



Government of India

The Kerala Advantage

Access to future-ready, re-skilled workforce

1.

Transition to Knowledge Economy

2.

Responsible Investment agenda

3.

Untapped potential for Hi-Tech & Digital

4.

Robust Logistics Infrastructure

5.

Integrated Industrial Policy 2023

6.





सत्यमेव जयते
Government of India



1st

Healthcare

School
Education
Quality

Sustainable
Development
Goals

Public Affairs

E-Governance
Service
Delivery

Front Runner



Tourism

Innovation

Energy
Efficiency

Export
Preparedness

Kerala: Key Accomplishments





Government of India

Economy

35m Population
94% Literacy rate;
highest in India

\$70 bn
GSDP* *2021-22
Quick Estimates
as per ER 2022

\$1,843
Per capita Income;
higher than national
average

9th
Largest
economy
in India

\$5.69 bn
Primary sector GSVA

\$16.37 bn
Secondary sector GSVA

\$38.96 bn
Tertiary sector GSVA



Government of India

Connectivity and Energy

2*

Major seaports

* 1 upcoming major seaport at Vizhinjam, Thiruvananthapuram

17

Minor/intermediate seaports

4

International Airports

5th, upcoming at Kottayam

23

Metro stations

1.69

thousand mile Roads

1,048 mile

Railways

363 mile

Coastal route

1056 mile

inland waterways

3428 MW

Total Installed Capacity- 54% Hydro

1864 MW Hydro

696 MW Thermal

539 MW Solar

266 MW Small Hydro

62 MW Wind

2.5 MW Bio Power

409 MW Private Power Generation



Government of India

Ecosystem

Exports

7 mn MT

merchandise export via
Cochin Port in 2020-21

\$ 1,533 mn

IT exports from Technopark,
Infopark and Cyberpark

48,500

Active IECs in the
State

18

Agri-export zones

\$ 1.8 mn

Export credit to
exporters

Major Sectors

- Gems & Jewelry
- Agricultural Products
- Spices
- Coir
- Marine Products
- Petroleum Products
- Leather & Footwear
- Tea & Coffee

Industries

13

Common Facility Centers (CFC) across
13 Industrial clusters

130+

Sector-focused
industrial parks and
areas

- Food Processing
- Hi-tech
- Export
- Defence
- Textile...

**Kochi Bengaluru
Industrial
Corridor
Mega Industrial
corridor project**

03

Development of new
Industrial Parks

- Medspark
- Petrochemical
- Rubber



Government of India

Investment Avenues

Food Processing and Marine Industries

- Opportunity to set up Food Tech Industries, Testing Centres, Technology Centers, Cold Chain, Refrigerated Logistics, Processing and Packing
- Kerala is home for 75% of India's EU Certified Sea Food Units, 7 state-of-the-art Food Parks including 2 Mega Food Parks.
- State-level Value Added Agriculture Mission (VAAM) to attain the objectives of value addition in agriculture
- Rich raw material base: Kerala's tropical agricultural produce offers it a great potential to export food products both in its original and processed forms
- Immense value addition prospects in coconut, jackfruit, banana, pineapple, tapioca, spices, coffee, tea, nuts, and oilseeds to create a global niche for the State in these sectors.
- Kerala is the 3rd largest seafood exporting State in terms of quantity with an annual export of 1,78,646 MT

Knowledge-based Industries

- New Industrial policy envisages building an Industry 4.0-ready industrial ecosystem by 2027 and fostering innovation across sectors.
- Kerala Knowledge Economy Mission is transforming the State into a Knowledge Society
- Country's first Centre of Excellence in Intelligent Internet of Things (IIoT) was set up at Kochi
- State with the Highest mobile network and optic fiber penetration in India
- More than 2.3 mn MSMEs offering immense potential



Government of India

Investment Avenues

Medical Devices and Biotechnology

- Investment Opportunities in Medical Device Manufacturing Unit, Research & Development, Healthcare Infrastructure, Distribution and Logistics, Telemedicine
- Bio-technology and Life Sciences notified at a sunrise sector
- The existing Bio 360 Life Sciences park offers access to an Innovation & Incubation Centre specializing in areas of Biopharmaceuticals and Biomaterials.

Green initiatives

- A robust Green Infrastructure ecosystem and a front runner in Green hydrogen adoption.
- Ambitious target to electrify all vehicles by 2030.
- Heavily subsidized electricity tariffs of 5-5.5 per unit will be offered to EV charging stations
- 3000 MW RE generation planned during 2022-27, out of which 2008 MW is Solar.
- Kerala is a front-runner in adopting H2 across ecosystem - Pilot fuel cell vessel, H2 buses and trains planned, H2 production
- Floating solar potential at Dams
The state is home to 61 Large Dams where the potential of setting up Floating Solar Plants can be explored.
- Kerala has about 20,000 hectares of fallow land or brackish areas without rice or fish cultivation - 10% of such area has the potential to develop ~1,500 MW of additional solar power



Government of India

Policy and Governance Ecosystem

Single window approvals for Industrial licensing.

Fast-track Online System for entrepreneurs for seamless statutory clearances throughout the life-cycle of project

Centralized Inspection System

ESG focused latest Industrial Policy

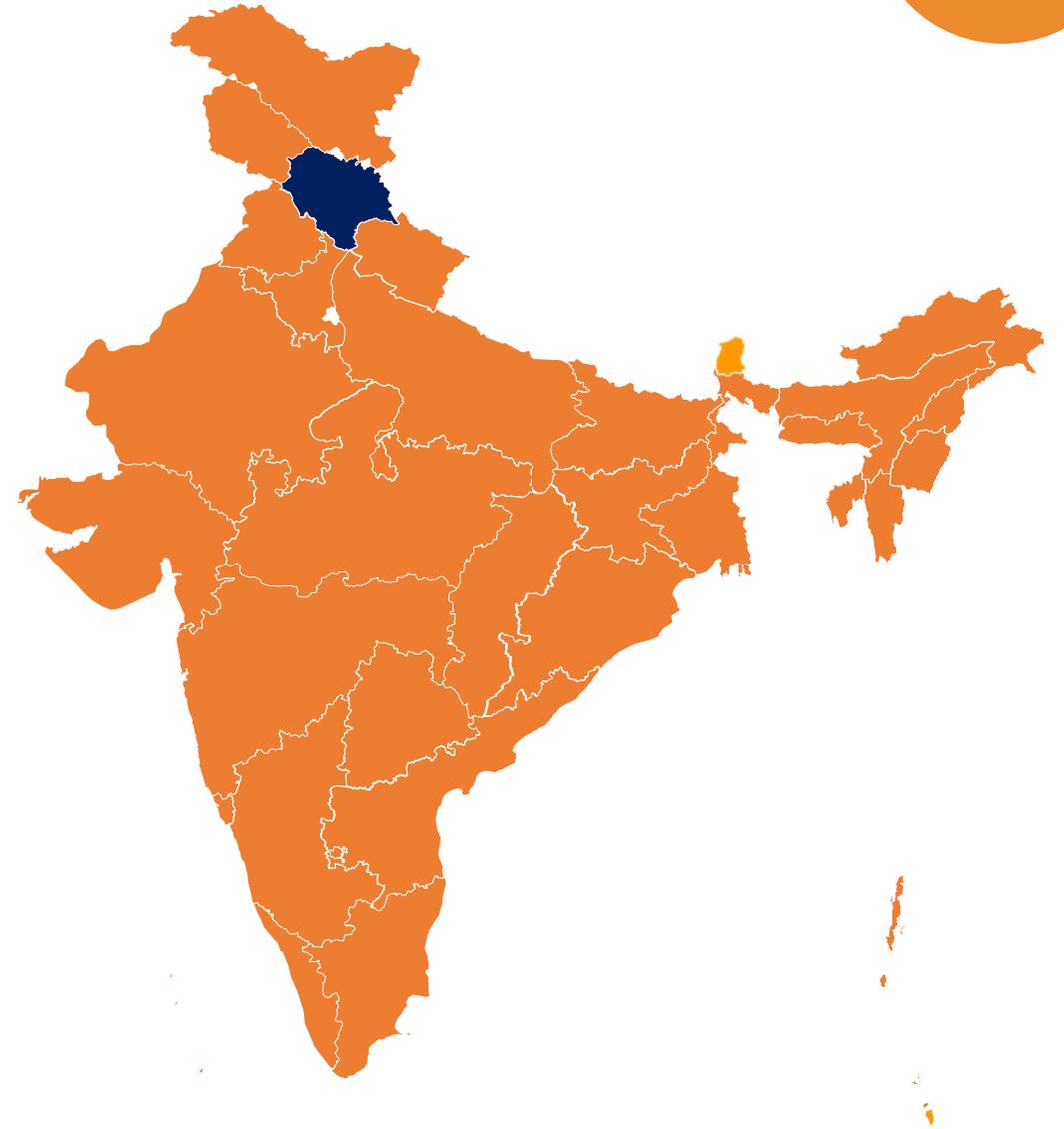
Vision: To build an Industry 4.0 ready industrial ecosystem by 2027 for generating responsible investments and fostering innovation across sector

Attractive Incentive Package

Added incentives in addition to the standard parameters for R&D, Branding, QA, IP, etc.



Himachal Pradesh





Government of India

Himachal Pradesh Profile



- Population: 68,64,602
- Area: 55,673 sq. km
- Districts: 12
- Tehsils: 113
- Subdivisions: 81



Affordable Land Cost



High Quality & Affordable Power



Proactive and Accessible Administration



Upcoming Multi Sector Specific Parks



Liberal & competitive incentives



Harmonious Industrial Relations



Himachal Pradesh- Key Socio-Economic Indicators & Achievements



Himachal Pradesh recorded **~\$1.93 Bn** worth of exports in FY 2022



\$25.6 Bn GSDP, Current price (2022-23) at the rate of **11%**



\$2,704 Per Capita Income, Current Price (2022-23), higher than the All –India figures over the years.



\$194.86 Mn FDI Inflows (Oct 2019 - Mar 2023)



Acknowledged as an **“Achiever State”** in Leads by DPIIT 2022



Acknowledged as an **“Achiever State”** in EoDB by DPIIT 2020



2nd Export Preparedness Index 2021 (EPI) (for Himalayan States) category by Niti Aayog



5th India Innovation Index 2021 among ‘North-Eastern/Hill States



Front Runner State in SDG India Index 2020-21 by NITI Aayog



4th rank in the country as per Food Safety Index Rankings by FSSAI 2021



Government of India

Focus Sector in Himachal Pradesh- Pharmaceuticals



One of the largest Pharma formulation Hub in the Country

40% of India's total manufacturing of drug formulations in Himachal

Presence of 600 + Pharma formulation & 2 API units in the State

Annual demand of bulk drug in the State: **US\$ 36,48.63 Mn- US\$ 4256.74 Mn** per annum (70% China & 30% others and domestic)

Pharma Exports from State: **US\$ 1033.81 Mn** of total State's exports

Quality certified Pharma Units-

USFDA
15

WHO-GMP
243

18 Health Care Products
Regulatory Agency (MHRA)

upcoming **Pharma Testing Lab** under TIES Scheme

Pharma Cluster

Baddi –Barotiwala –Nalagarh Industrial Corridor

Kala Amb Pharma Cluster

Parwanoo Pharma Cluster

Paonata Sahib Pharma Cluster

Sansarpur Terrace Pharma Cluster

Solan Pharma Cluster

Key Pharma Players





Government of India

Focus Sector in Himachal Pradesh- Agro & Food Processing

State known as “**Fruits & Vegetable Bowl of India**”

Four favourable agro-climatic zones (ideal for off season vegetable and exotic fruits)

Floriculture produce such as Carnation, Liliun, Chrysanthemum, Alstroemeria, Rose, Gladiolus, Marigold

Operational **Food Park**, cold chains, food processing units

State’s First Food Park developed by Cremica Food Park Pvt Ltd in Una District

Availability of skilled & technical manpower

Agri Business & Food Cluster

Category	Districts
Dairy products & analogues	Shimla, Mandi, Bilaspur, Kullu, Kangra, Solan, Hamirpur, Una & Sirmaur
Spices	Mandi, Bilaspur, Shimla
Prepared Foods	Kangra, Mandi, Hamirpur
Cereals & Cereals products	Solan, Hamirpur, Kangra, Kullu & Kangra
Ready to eat	Hamirpur, Solan, Kangra
Pickles, Jam, Squash	Solan, Kangra, Una

Key Players





Government of India

Himachal Pradesh- Key Investment Opportunities



Tourism & Hospitality



Hotels/ Motels/
Wellness Resorts



Spiritual/ Circuit/
Theme Tourism



Ropeways



Adventure Tourism/
water sports



Eco Tourism/
Wildlife Tourism

Pharmaceuticals



Pharma Park



R&D Facilities



Bulk Drug
Manufacturing



Medical
Devices



Nutraceutical
Manufacturing

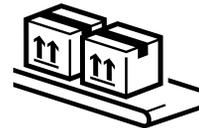
Horticulture & Food Processing



Processing Units



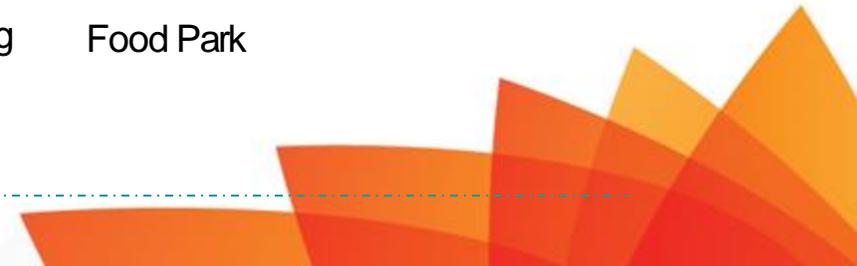
Cold Chain & CA
storage facilities



Integrated Packaging
Houses



Food Park





Government of India

Himachal Pradesh- Key Investment Opportunities



Manufacturing & Engineering



Textile Park



Light Engineering



High Precision
Engineering Equipment



EV/ Auto and Auto
Equipment

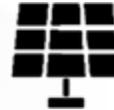
Renewable Energy



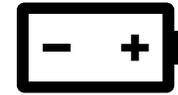
Small Hydro Power
projects



Large Hydro Power
plants



3 solar plants
identified (20 MW)



Energy Storage

Education & Skill Development



Residential
Schools



Smart Schools



Education Infrastructure in
PPP mode



Collaboration with
Foreign Universities



Government of India

Strong Policy Support & Supporting Infrastructure



- **Attractive Land lease with Interest Free payment terms**
- **Reimbursement of Net SGST & Attractive Interest Subvention on term loan**
- **Concessional Power Tariff and Electricity Duty**
- **Subsidies/Incentives on Transport, Environmental Compliance, Patent filing etc.**
- **Customized Package of Incentives for Mega Industrial Projects**
- **Supporting Technical Infrastructure : Common Effluent Treatment Plant, CIPET, Inland Container Depot, MSME Technology Centre, Skill Development Centre and Gas Pipeline**
- **Robust Road, Rail and Air Connectivity**



Government of India

Himachal Pradesh- Sector Specific Policy



**Logistic
Policy 2022**



**Drone Policy
2022**



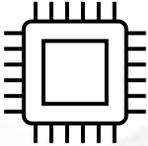
**Science,
Technology
and Innovation
Policy - 2021**



**Swaran
Jayanti Energy
Policy-2021**



**Industrial
Investment
Policy 2019**



**IT, ITeS &
ESDM policy
2019**



**State Ayush
Policy 2019**



**Tourism Policy
2019**





Government of India

Key Players across Manufacturing Sector



Pharmaceutical

SUN Pharma, Dr Reddy's, Cipla, Cedilla, Morepen



FMCG & Food-Processing

Colgate, Himalaya, ITC, Nestle, Loreal, Gillette, P&G, Dabur, Mondelez, Loreal, Unilever, Godrej



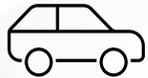
Cement & Steel

Ambuja, Ultratech Cement, ACC



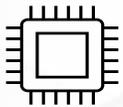
Textile

Vardhman, Indorama, Birla Textile, Le Cooper



Auto & Automobile Components

TVS Motors, Indo Farm, Emmbros, Autocomp



Electrical & Electronics

Havells, Microtek, Sukam, Luminous, Phillips





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