

# Haryana

MARCH  
2013

THE BREAD BASKET OF INDIA



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# Haryana

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- ❖ Infrastructure Status
- ❖ Business Opportunities
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## Haryana Factfile



Source: Maps of India

→ Haryana is surrounded by Uttar Pradesh in the East, Punjab in the West, Himachal Pradesh in the North and Rajasthan in the South. The state surrounds the national capital city, New Delhi, from three sides.

→ The most commonly spoken languages are Hindi and Punjabi. English is the medium of education in most schools.

→ Gurgaon, Faridabad, Karnal, Ambala, Panipat and Kurukshetra are some of the key districts of the state.

→ The state has three major seasons, viz., hot weather (April-June), rainy season (July-September) and cold weather (October-March).

Parameters	Haryana
Capital	Chandigarh
Geographical area (sq km)	44,212
Administrative districts (No)	21
Population density (persons per sq km)*	573
Total population (million)*	25.3
Male population (million)*	13.5
Female population (million)*	11.8
Sex ratio (females per 1,000 males)*	877
Literacy rate (%)*	76.6

Sources: Government of Haryana Website, www.haryana.gov.in,  
\*Provisional Data – Census 2011

## Haryana in Figures ... (1/2)

Parameter	Haryana	All-States	Source
<b>Economy</b>			
GSDP as a percentage of all states' GSDP	3.7	100	CMIE, 2010-11, current prices
Average GSDP growth rate (%)*	18.1	15.9	CMIE, 2004-05 to 2010-11, current prices
Per capita GSDP (US\$)	2,292.3	1,324.3	CMIE, 2010-11, current prices
<b>Physical Infrastructure</b>			
Installed power capacity (MW)	8,113.7	211,766.2	Central Electricity Authority, as of January 2013
Wireless subscribers (No)	19,527,872	864,720,186	Telecom Regulatory Authority of India, as of December 2012
Broadband subscribers (No)	298,823	13,350,938	Ministry of Communications & Information Technology, as of December 2011
National Highway length (km)	1,633	76,818	Ministry of Road Transport & Highways, as of June 2012
Airports (No)	6 <sup>^</sup>	133	Airport Authority of India

\*Calculated in Indian Rupee Terms  
<sup>^</sup>Including five Civil Aerodromes

## Haryana in Figures ... (2/2)

Parameter	Haryana	All-States	Source
<b>Social Indicators</b>			
Literacy rate (%)	76.6	74.0	Provisional Data – Census 2011
Birth rate (per 1,000 population)	21.8	21.8	SRS Bulletin (www.censusindia.gov.in), 2012
<b>Investment</b>			
FDI equity inflows (US\$ billion)	1.1*	187.9	Department of Industrial Policy & Promotion, April 2000 to December 2012
Outstanding Investments (US\$ billion)	371.7	11,318.3	CMIE (2011-12)
<b>Industrial Infrastructure</b>			
PPP projects (No)	40	881	www.pppindiadatabase.com
SEZs (No)	35	386	Notified as of January 2013, www.sezindia.nic.in

PPP: Public Private Partnership, SEZ: Special Economic Zone, SRS: Sample Registration System  
\*Including Chandigarh, Punjab and Himachal Pradesh

## Advantage Haryana ... (1/2)

### Industrial State

Haryana is an industrial state and has emerged as a base for the knowledge industry including IT and biotechnology. It is also a leading agricultural state of the country. Many large Indian and multi-national companies have set-up offices in the state because of good infrastructure and proximity to Delhi.

### Policy and Fiscal Incentives

The state offers a wide range of fiscal and policy incentives for businesses under the Industrial and Investment Policy, 2011. Additionally, the state has sector-specific policies, particularly, on IT and tourism.

### Rich Labour Pool

Haryana has a large base of skilled labour, making it an ideal destination for knowledge-based and manufacturing sectors. Further, the state has a large pool of semi-skilled and unskilled labour for support services.

## Advantage Haryana ... (2/2)

### Facilitating Infrastructure

The state has well developed social, physical and industrial infrastructure and virtual connectivity. It is among the states with good physical infrastructure such as power, roads and railways. The state has 26,907 km of roads and approximately 1,540 km of railway network.

### Strategic Location

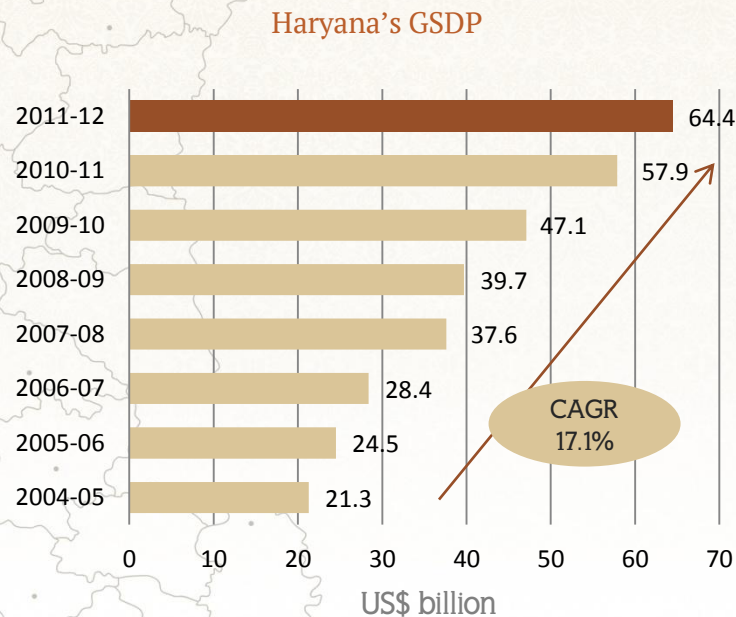
Around 40.0 per cent of the National Capital Region (NCR) of Delhi falls in Haryana. The NCR Board, under the Ministry of Urban Development, Government of India, decides on common development of cities falling in the NCR, thereby, facilitating seamless trade and commerce.

### Stable Political Environment

The state has a stable political environment with a single party State Government. Successive State Governments have been committed to creating a progressive business environment.

## Economic Snapshot – GSDP

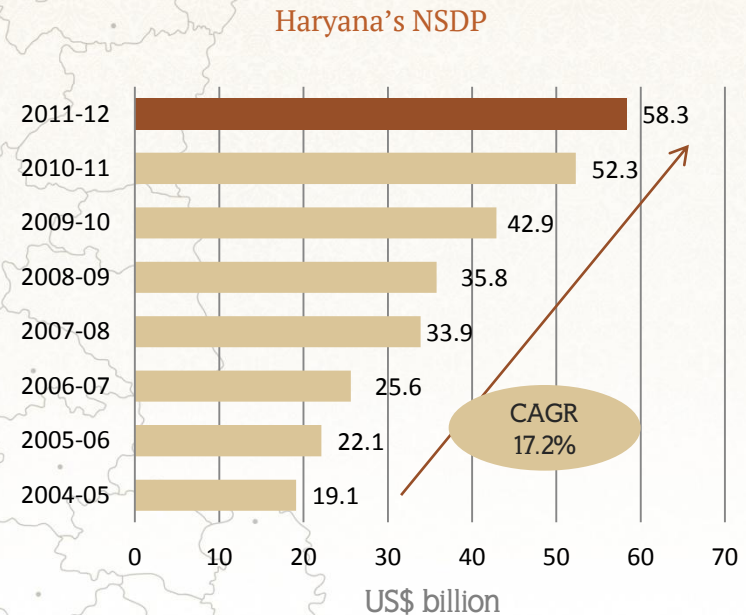
- At current prices, the total Gross State Domestic Product (GSDP) of Haryana was about US\$ 64.4 billion in 2011-12.
- The state's GSDP grew at a Compound Annual Growth Rate (CAGR) of 17.1 per cent between 2004-05 and 2011-12.



Source: CMIE

## Economic Snapshot – NSDP

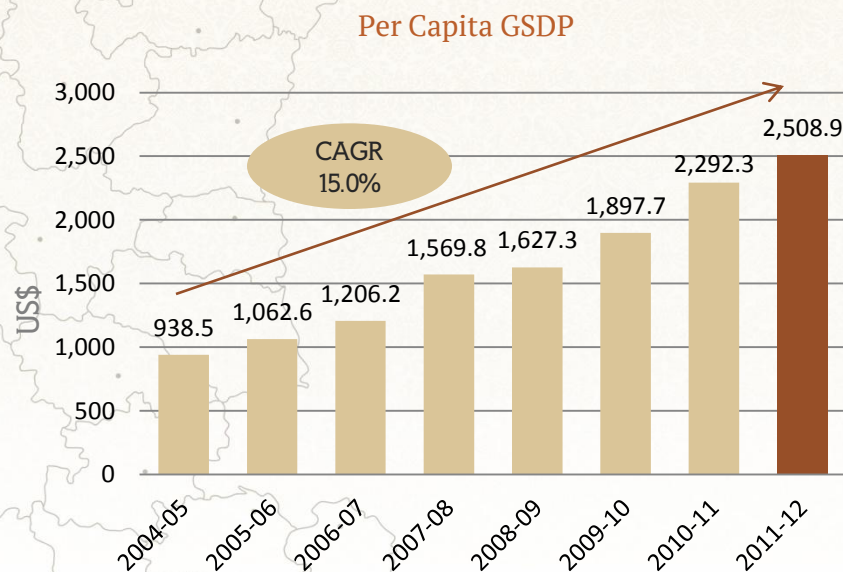
- At current prices, the Net State Domestic Product (NSDP) of Haryana was about US\$ 58.3 billion in 2011-12.
- The state's NSDP grew at a CAGR of 17.2 per cent between 2004-05 and 2011-12.



Source: CMIE

## Economic Snapshot – Per Capita GSDP

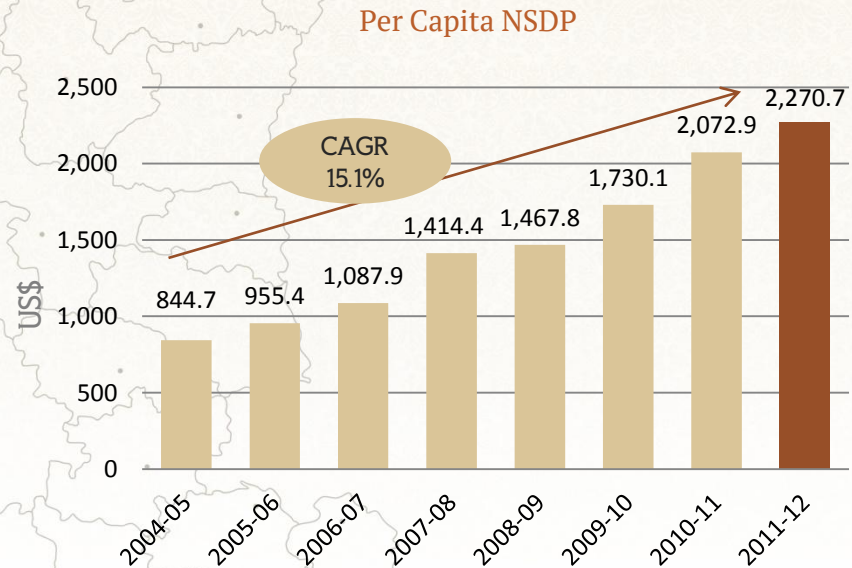
- The state's per capita GSDP in 2011-12 was US\$ 2,508.9 as compared to US\$ 938.5 in 2004-05.
- The per capita GSDP increased at an average rate of 15.0 per cent between 2004-05 and 2011-12.



Source: CMIE

## Economic Snapshot – Per Capita NSDP

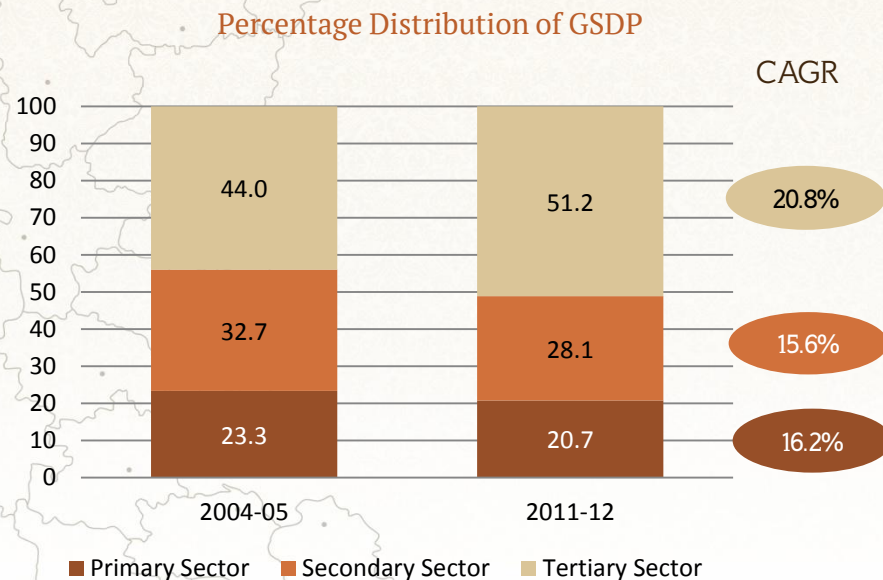
- The state's per capita NSDP in 2011-12 was US\$ 2,270.7 as compared to US\$ 844.7 in 2004-05.
- The per capita NSDP increased at an average rate of 15.1 per cent between 2004-05 and 2011-12.



Source: CMIE

## Economic Snapshot – Percentage Distribution of GSDP

- The tertiary sector is the largest contributor to Haryana's economy. In 2011-12, it contributed 51.2 per cent to the state's GSDP at current prices. It was followed by the secondary sector at 28.1 per cent.
- The tertiary sector grew at an average rate of 20.8 per cent between 2004-05 and 2011-12; driven by trade, hotels, real estate, finance, insurance, transport and communications.
- The secondary sector grew at an average rate of 15.6 per cent during the period 2004-05 and 2011-12. Its growth was driven by manufacturing, construction and electricity, gas & water supply.
- The primary sector grew at an average rate of 16.2 per cent between 2004-05 and 2011-12.



Source: CMIE

## Economic Snapshot – Agricultural Production

- Wheat, sugarcane, rice, cotton, rapeseed and mustard are the key agricultural products of the state.
- In 2011-12, the total production of food grains was estimated at 17.2 million tonnes.
- In 2011-12, the total production of wheat and rice was estimated at 11.8 million tonnes and 3.7 million tonnes respectively.
- The production of oilseeds and sugarcane during the year 2011-12 was estimated at 1.0 million tonnes and 6.7 million tonnes, respectively.

Crop	Annual Production in 2011-12 (Provisional) ('000 tonnes)
Wheat	11,861
Sugarcane	6,745
Rice	3,759
Cotton	2,621*
Oilseeds	1,029
Millet (Bajra)	1,177
Potato	598 <sup>^</sup>
Onion	453 <sup>^</sup>
Pulses	167

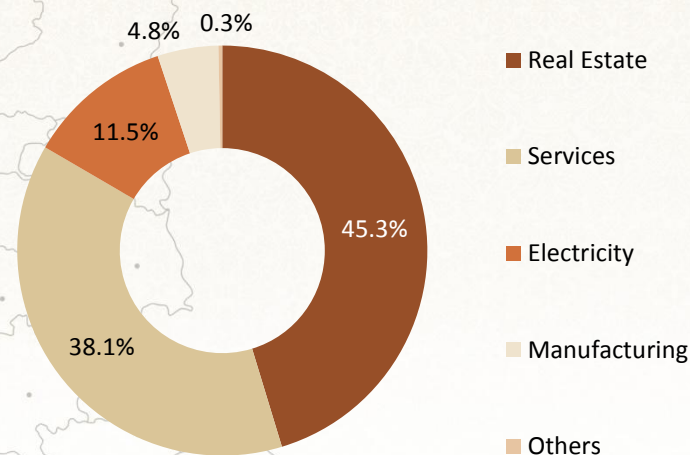
Sources: Economic Survey of Haryana, 2011-12, Indian Horticulture Database – 2011, National Horticulture Board, Department of Agriculture, Haryana  
\*000' bales of 170 kgs each  
<sup>^</sup>In 2010-11

## Economic Snapshot – FDI Inflows & Investments

- According to the Department of Industrial Policy & Promotion (DIPP), the cumulative FDI inflows from April 2000 to December 2012 amounted to US\$ 1.18 billion\*.
- In 2011-12, outstanding investments in the state were US\$ 371.7 billion. The real estate sector accounted for the largest share of 45.3 per cent, followed by services (38.1 per cent) and electricity (11.5 per cent).
- Key projects under execution include an integrated refinery-cum-petrochemical complex of Indian Oil Corporation, a coal based super-critical thermal power project of Aravali Power, two coal-based power projects of Haryana Government and an engineering Special Economic Zone (SEZ) project of Raheja SEZs Limited.

\*Including Chandigarh, Punjab and Himachal Pradesh

Break up of Outstanding Investments by Sector (2011-12)

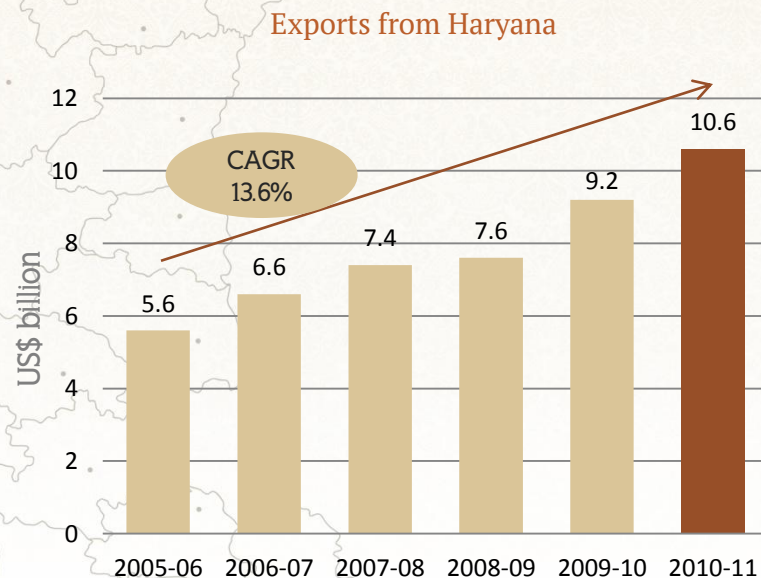


Others include mining and irrigation

Source: CMIE

## Economic Snapshot – Export Trends

- The total industrial exports from Haryana have increased from US\$ 9.2 billion during 2009-10 to US\$ 10.6 billion during 2010-11.
- The IT/ITeS exports have reached the level of US\$ 4.8 billion during 2009-10.
- The setting-up of SEZs has also helped increase exports in the state.



Source: Department of Economic and Statistical Analysis Haryana

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## Physical Infrastructure – Roads

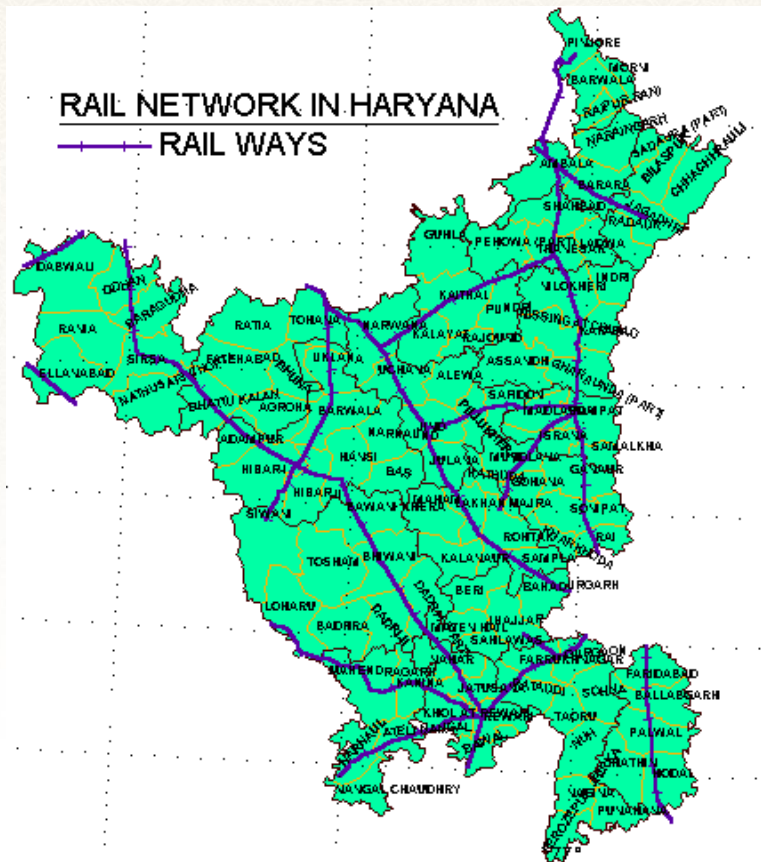


Source: Maps of India

- As of June 2012, Haryana had 1,633 km of National Highways.
- As of December 2011, the state had 26,907 km of roads network.
- It is one of the states with 100 per cent connectivity of rural areas with metalled roads.
- Haryana Roadways, with its fleet of nearly 3,500 buses, is among the biggest state road transport undertakings in the country.
- Some of the major National Highways, NH-1, NH-2, NH-8, NH-10 and NH-22, pass through the state.

Sources: Economic Survey of Haryana, 2011-12,  
Ministry of Road Transport & Highways, Government of India

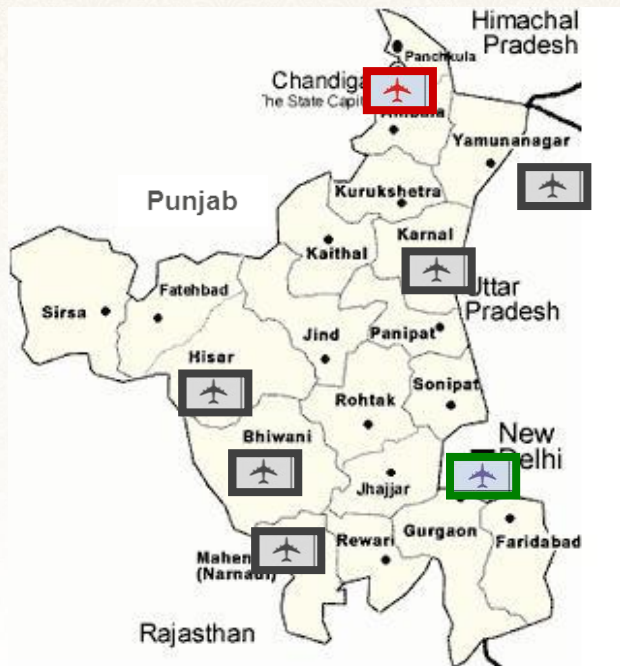
## Physical Infrastructure – Railways



Source: Maps of India

- As of March 2011, Haryana had a railway-route length of 1,540 km.
- Kalka, Kurukshetra, Rohtak, Jind, Hissar, Ambala, Panipat, Gurgaon and Jakhal are some of the important railway stations. There is a railway workshop at Jagadhari.
- The Delhi Metro, a rapid transit system, has connectivity with Gurgaon.
- The Rapid Metro Rail, Gurgaon is scheduled to be completed by 2013. There will be six stations in the city - Sikanderpur, DLF Phase II, Belvedere Towers, Gateway Towers, Mousari Avenue and DLF phase III.

## Physical Infrastructure – Airports



International Airport



Domestic Airport



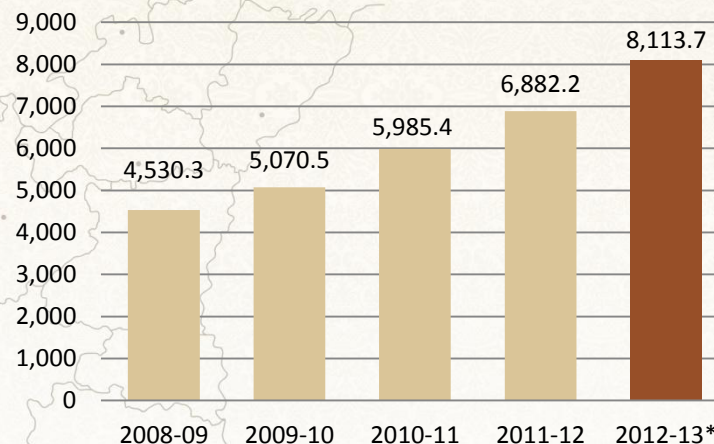
Civil Aerodrome

- There is a domestic airport at Chandigarh and civil aerodromes at Pinjore, Karnal, Hissar, Bhiwani and Narnaul.
- The Indira Gandhi International Airport at New Delhi is located close to Gurgaon and Faridabad.
- The state has planned establishment of an International cargo airport along with provision of aircraft maintenance hub in Rohtak, Haryana. The proposal has been taken up with the Ministry of Civil Aviation and the Airport Authority of India for taking the project further.

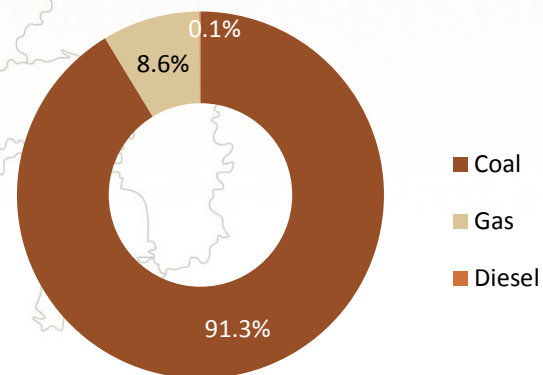
## Physical Infrastructure – Power ... (1/3)

- As of January 2013, Haryana had a total power generation installed capacity of 8,113.75 MW; 4,143.53 MW was owned by the State Government, 2,297.12 MW was owned by the Central Government and 1,673.10 MW was owned by the private sector.
- State-owned capacity comprised 76.2 per cent of coal-based power plants and 21.3 per cent of hydropower plants. Private-sector power capacity was totally based on coal-based power plants and renewable energy sources.

Installed Power Capacity (MW)



Mode-wise Classification of Installed Thermal Power Capacity\*



Source: Central Electricity Authority  
\*As of January 2013

## Physical Infrastructure – Power ... (2/3)

- Domestic consumers account for about 76.9 per cent of power consumption; agriculture and industry are the two other prominent consumer segments.
- Haryana has been a state with 100 per cent rural electrification since 1970.
- In its Annual Plan, 2012-13, the Haryana Government has given an outlay of US\$ 282.9 million to improve generation and power availability. Of this, about US\$ 2.0 million has been provided for the development of renewable energy sources.

### Proposed Projects

- 1,500 MW gas-based project at Faridabad.
- 660 MW capacity thermal unit at Yamuna Nagar.
- 2,800 MW (4x700 MW) nuclear power plant near Fatehabad.

### Operational Projects (As of October 2012)



Source: Haryana Power Generation Corporation Limited

## Physical Infrastructure – Power ... (3/3)

### Projects under Implementation

- 3X500 MW Indira Gandhi Super Thermal Power Project (IGSTPP), at Jhajjar.
- 1,320 MW Mahatma Gandhi Thermal Power Project, at Jhajjar.
- Procurement of 2,113 MW on long term basis through tariff based competitive bidding.

Segment	Company Name
Power Generation	Haryana Power Generation Corporation Limited (HPGCL)
Power Transmission and Distribution	Haryana Vidyut Prasaran Nigam Limited (HVPNL)
	Dakshin Haryana Bijli Vitran Nigam (DHBVN) - Subsidiary of HVPNL
	Uttar Haryana Bijli Vitran Nigam (UHBVNL) - Subsidiary of HVPNL

## Physical Infrastructure – Telecom

- According to Telecom Regulatory Authority of India (TRAI), Haryana had nearly 19.5 million wireless subscribers and 571,344 wire-line subscribers, as of December 2012.
- There were 298,823 broadband subscribers in the state, as of December 2011.
- The teledensity of Haryana was 76.72 per cent, as of December 2012.
- As of December 2011, the state had 1,301 telephone exchanges and 11,166 Public Call Offices (PCOs).

### Telecom Infrastructure (December 2012)

Wireless Subscribers	19,527,872
Wire-line Subscribers	571,344
Broadband Subscribers	298,823*
Public Call Offices (PCOs)	11,166*
Telephone Exchanges	1,301*

Sources: Telecom Regulatory Authority of India,  
Department of Telecommunications, Annual Report 2011-12,  
Ministry of Communications & Information Technology  
\*As of December 2011

### Some of the Major Telecom Operators in Haryana

Bharat Sanchar Nigam Limited (BSNL)  
Bharti Airtel  
IDEA Cellular  
Vodafone Essar  
Reliance Communications  
Tata Teleservices  
Aircel Limited

## Development Projects: Urban Infrastructure

- Under the Jawaharlal Nehru National Urban Renewal Mission (JNNURM), four projects costing US\$157 million have been sanctioned for Faridabad.
- The projects had been sanctioned between 2006-07 and 2008-09. Some of the key areas of development are water supply, storm-water drainage and solid-waste management.
- In 2011-12, a provision of US\$ 290.0 million has been made in the revised plan outlay for different schemes like Jawaharlal Nehru National Urban Renewal Mission (JNNURM), Urban Infrastructure Development Scheme for Small and Medium Towns (UIDSSMT), Integrated Housing and Slum Development Programme (IHSDP), Rajiv Gandhi Urban Development Mission, Haryana (RGUDMH).
- The State Government has provided impetus and would continue to strengthen the financial status of Urban Local Bodies and provide adequate funds for improving the civic amenities in urban areas. There are 77 Urban Local Bodies in the state; consisting of nine Municipal Corporations, 14 Municipal Councils, and 54 Municipal Committees.

*Sources:* JNNURM, Ministry of Urban Development,  
Economic Survey of Haryana, 2011-12

## Development Projects: Key Public Private Partnership Projects



Name of Project	Sector	PPP Type	Project Cost (US\$ million)	Stage
Setting up of Thermal Power Project, Jhajjar	Energy	BOT	1,316.6	Construction
Construction of Kundli Manesar Palwal Expressway	Roads	BOT	558.4	Construction
Panipat-Jalandhar	Roads	BOT-Toll	497.4	Construction
Development of metro link from Delhi Metro Sikanderpur to NH 8 Gurgaon	Railways	BOT	187.7	Construction
Rohtak-Panipat	Roads	BOT-Toll	179.3	Construction
Rohtak-Bawal	Roads	BOT-Toll	144.4	Construction
Delhi-Haryana Border to Rohtak	Roads	BOT-Toll	127.6	Construction
Zirakpur-Parwanoo	Roads	BOT-Toll	103.4	Construction
Badarpur Elevated Highways	Roads	BOT-Toll	73.9	Construction
Ambala-Zirakpur	Roads	BOT-Toll	64.8	In Operation
Panipat Elevated Highway	Roads	BOT-Toll	58.7	Construction

Source: pppindia database.com  
BOT: Build-Operate-Transfer

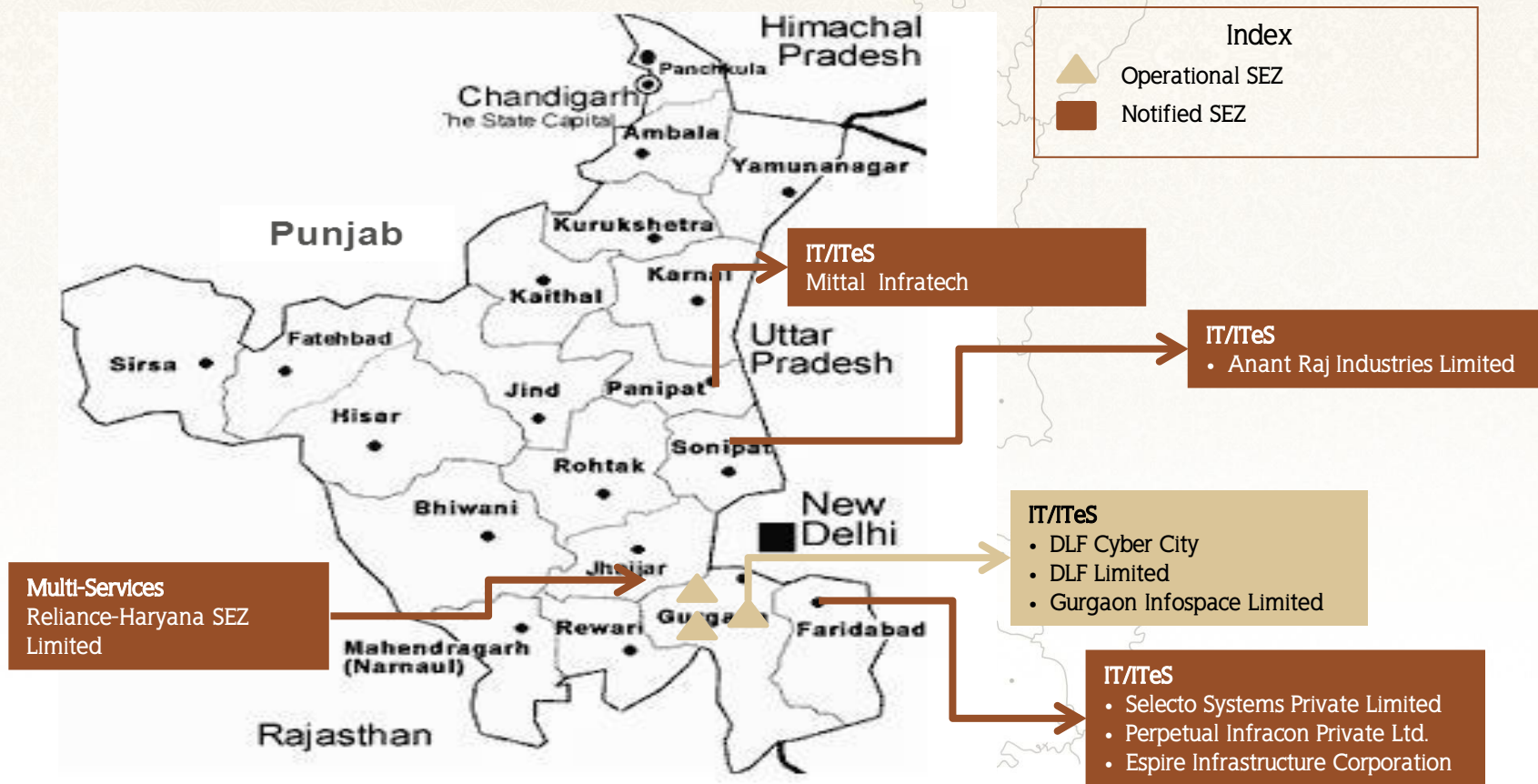
## Development Projects: SEZs and Industrial Clusters ... (1/4)

- As of January 2013, the state had three operational SEZs.
- Around 49 proposals have been granted in-principle/formal approval in the state by the Government of India.
- As of January 2013, the state had 46 formal approvals, three in-principle approvals and 35 notified SEZs.

Source: sezindia.nic.in

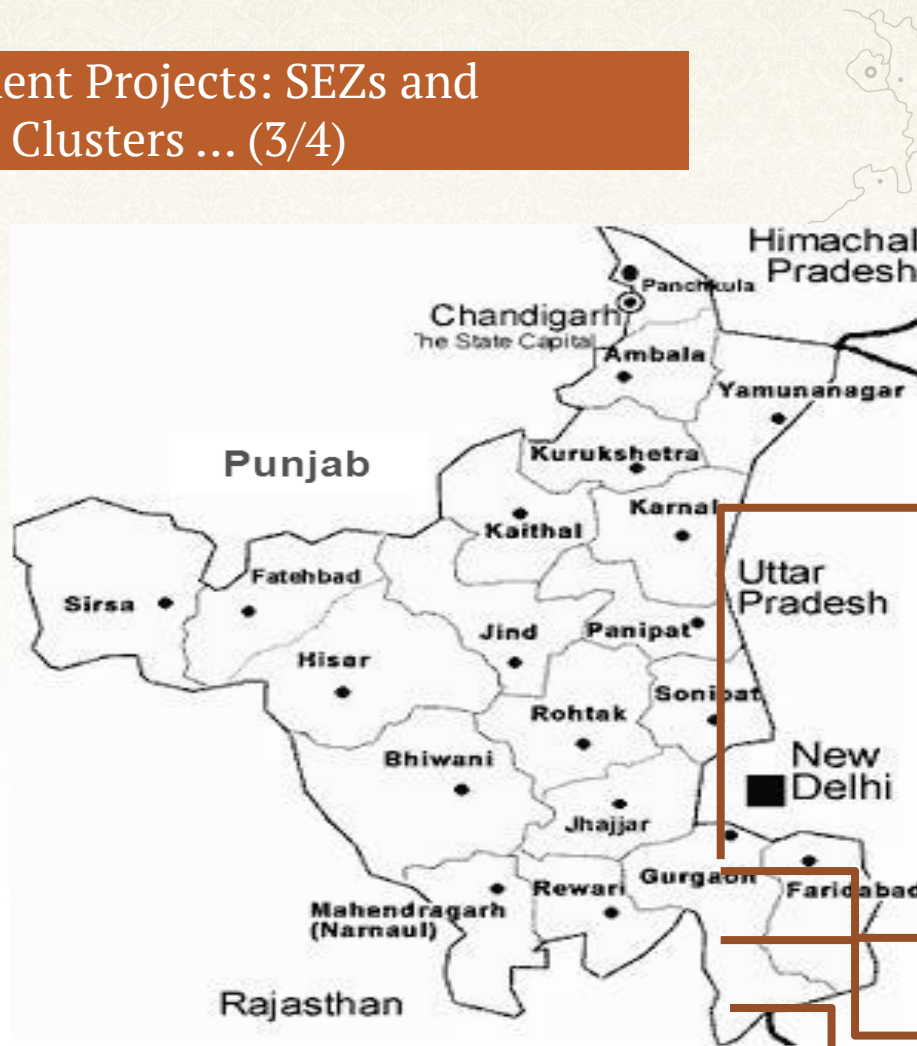
S No	Some of the Promoters of SEZs: Planned or Under Construction
1	Reliance Haryana SEZ Ltd at Gurgaon
2	DLF Cyber City Developers Ltd at Gurgaon
3	Perpetual Infracon Private Ltd at Faridabad
4	Perpetual Infracon Private Ltd at District Faridabad
5	Raheja Haryana SEZ Developers at Wazirpur, District Gurgaon
6	Ansal Colours Engineering SEZ at District Sonapat
7	Haryana Technology Park at Faridabad
8	Natasha Housing & Urban Development Ltd at Panipat
9	DLF Ltd at Gurgaon
10	Suncity Haryana SEZ Developer Pvt Ltd at Gurgaon

## Development Projects: SEZs and Industrial Clusters ... (2/4)



As of January 2013  
Source: sezindia.nic.in

## Development Projects: SEZs and Industrial Clusters ... (3/4)



SEZ (Notified) in Gurgaon (As of January 2013)

### IT/ITes

- Uppal Developer
- Dr Fresh Health Private Limited
- Luxor Cyber City Private Limited
- Parsvnath SEZ Limited
- Suncity Haryana SEZ
- Metro Valley Business Park Private Limited
- GHI Finlease
- Canton Buildwell Private Limited
- Unitech Realty Projects Limited
- Ascendant Estates Private Limited
- Ansal SEZ Projects Limited
- Progressive Buildestate Private Limited
- Sunwise Properties Private Limited
- Mohan Investments and Properties Private Limited
- G P Realtors Private Limited
- Mikado Realtors Private Limited

**Textiles:** Orient Craft

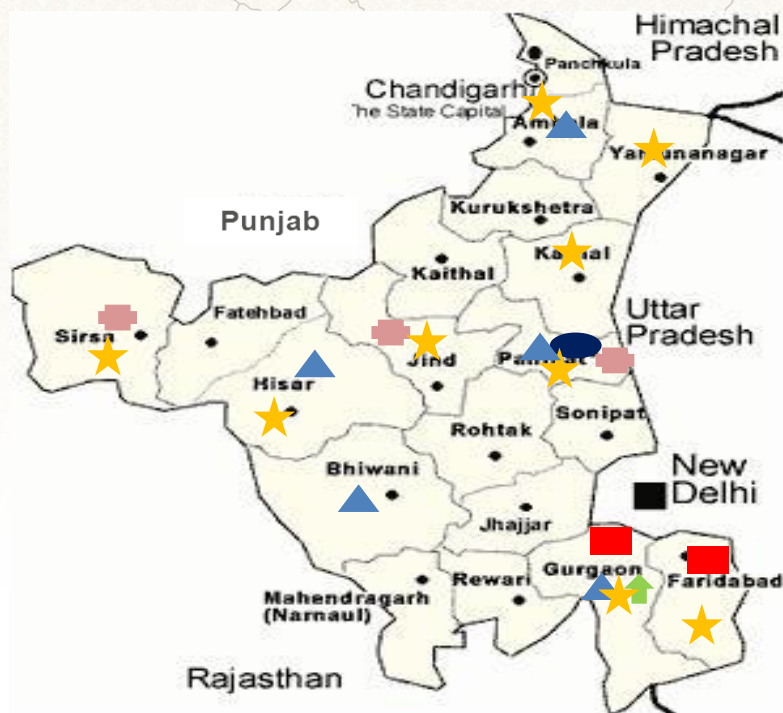
**Biotechnology:** Mayar Infrastructure Development Limited

**Engineering:** Raheja Haryana SEZ Developers

Source: sezindia.nic.in

## Development Projects: SEZs and Industrial Clusters ... (4/4)

Industrial Clusters in Haryana



Index	
	Textile and Handloom
	Automotive
	Engineering
	IT and ITeS
	Petrochemicals
	Agro-based Industry

## Social Infrastructure – Education

- The state has a strong primary-education infrastructure with a primary school located within 1.03 km radius of each village and a middle-school within 1.07 km radius.
- As of 2011-12, there were one higher-secondary and one senior-secondary school located in a 1.52 km and 2.28 km radius, respectively.
- In the state's annual plan, 2012-13, allocation for education was increased to US\$ 590.7 million from US\$ 416.7 million in 2011-12.
- An Indian Institute of Management (IIM) has been established in the Rohtak district.
- The Central Government has decided to set up Rajiv Gandhi Education City at Kundli (Sonapat). Institutions of excellence for higher learning/research are being set-up in the Education City.

Literacy Rate (%)	
Total	76.6
Male	85.4
Female	66.8

Source: Census 2011 (Provisional Data)

No of Educational Institutions (2011-12)	
Universities	23
Colleges	680
Polytechnics	187
Engineering Colleges	164
MBA Colleges	176
MCA Colleges	62
Industrial Training Institutes (ITIs)	123
Primary Schools	13,111
Middle Schools	3,660
High Schools	3,324
Senior secondary schools	2,667

Source: Haryana at a Glance, Government of Haryana Website, www.haryana.gov.in

MBA: Master of Business Administration

MCA: Master of Computer Applications

## Social Infrastructure – Health

- As of March 2012, Haryana had 164 Hospitals/ Community Health Centres, 441 Primary Health Centres and 2,630 Sub-Centres.
- As of October 2012, the state had 67 Employees State Insurance (ESI) Dispensaries.
- As of March 2011, the state had 21 District Hospitals, 25 Sub-Divisional Hospitals, 107 Community Health Centres and 193 Dispensaries
- In the Annual plan, 2012-13, allocation for health services including medical education was US\$ 118.1 million.

Health Indicators (2011)	
Birth Rate*	21.8
Death Rate*	6.5
Infant Mortality Rate**	44
Life Expectancy at Birth (years)	
Male (2006-2011)	65.5
Female (2006-2011)	70.0

Sources: Economic Survey of Haryana, 2010-11, Sample Registration System (SRS) Bulletin 2012 (www.censusindia.gov.in)

\*Per thousand persons  
\*\*Per thousand live births

Medical Institutes in Haryana
Post Graduate Institute of Medical Sciences and Research, Rohtak
Medical College, Agroha
Two new medical colleges have been established at Nalhar (Mewat) and Khanpur Kalan (Sonapat)

Source: Economic Survey of Haryana, 2011-12

## Cultural Infrastructure

- There are various dance forms of the state including Phag, Dhamal, Ratvai, Khorla, Ghoomar and Ganguar.
- Important festivals of the state are Lohri, Basant Panchami, Holi, Gangore, Baisakhi, Nirjala Akadshi, Gugga Naumi and Navratri.
- Fairs held in Haryana include Gopal-Mochan, Masani, Basdoda, Surajkund and the Kartik Cultural Festival.
- Museums in the state include Urusvati Museum of Folklore (Gurgaon), Sanskriti Museum (Gurgaon), Museum of Folk and Tribal Art (Gurgaon), Sri Krishna Museum (Kurukshetra) and City Museum (Chandigarh).
- Prominent stadiums in the state include Tejli Sports Complex (Yamunanagar), Nahar Singh Stadium (Faridabad), Tau Devi Lal Stadium (Panchkula) and Nehru Stadium (Gurgaon).
- 'Kingdom of Dreams' is India's first live entertainment and leisure destination located in Gurgaon.
- The Epicentre in Gurgaon has been developed as an arts and culture centre.

## Industrial Infrastructure

- The state has taken a number of initiatives for developing industrial infrastructure to achieve consistent economic growth.
- An industrial model township is coming up at Manesar, near Gurgaon. It is being developed as an automotive and engineering-hub.
- Historically an agrarian state, Haryana is now a well developed industrial state. Haryana State Industrial & Infrastructure Development Corporation (HSIIDC) is the state's premier industrial promotion agency. It is responsible for providing reliable and efficient facilities for entrepreneurs investing in the state.

### Proposed Industrial Model Townships (IMT)

IMT Rohtak  
IMT Faridabad  
IMT Kharkhoda  
IMT Roz-ka-Meo

### Mega-Projects of Haryana

Delhi Mumbai Industrial Corridor (DMIC) Project  
To set up an International Cargo Airport at Bhaini Maharajpur & Bhaini Bhairon villages  
Kundli-Manesar-Palwal (KMP) Expressway on Build-Operate-Transfer (BOT) basis

*Source: HSIIDC Website*

## Industrial Infrastructure - Existing Industrial Estates ... (1/2)



Estate/Location	Brief Description
<p>IMT Manesar (Phase-1 is developed, Phases II, III and IV are under development)</p>	<ul style="list-style-type: none"> <li>• Located at a distance of 50 km from Delhi, on NH-8 and about 32 km from the Indira Gandhi International Airport (IGI).</li> <li>• Focuses on hi-tech and hi-precision non-polluting units such as automotive, readymade garments, ITeS and packaging.</li> </ul>
<p>Growth Centre, Bawal (Phase-1 is complete, Phase-II is being developed)</p>	<ul style="list-style-type: none"> <li>• Located on NH-8, about 90 km from New Delhi.</li> <li>• Key companies in the centre include Yoshida Kogyo Kabushibibaisha (YKK), Alchemist Metals Limited (Formerly known as TDT Copper), Exide, Becton Dickinson, Kansai Nerolac Paints Ltd, Svedala and Asahi India Glass.</li> </ul>
<p>Udyog Vihar, Gurgaon</p>	<ul style="list-style-type: none"> <li>• Located on NH-8, about 6 km from IGI.</li> <li>• Focuses on industries from the IT/ITeS, electronics, electrical goods, pharmaceuticals, light engineering, auto parts and component, and ready-made garments sectors.</li> <li>• Maruti Udyog, a leading car manufacturer of India, has its base in Udyog Vihar.</li> </ul>
<p>Kundli (Phases I, II and Export Promotion Industrial Park (EPIP) are complete, Phase-IV is being developed.</p>	<ul style="list-style-type: none"> <li>• Located on NH-1 on the Delhi-Haryana border, in Sonapat district.</li> <li>• Has industrial units from the general engineering, cycle parts, dairy products and agro-based sectors.</li> </ul>

Source: HSIIDC Website

## Industrial Infrastructure - Existing Industrial Estates ... (2/2)



Estate/Location	Brief Description
Faridabad	<ul style="list-style-type: none"> <li>• Located about 20 km from New Delhi, on the Delhi-Mathura highway.</li> <li>• Has industrial units for the light engineering sector.</li> </ul>
Murthal	<ul style="list-style-type: none"> <li>• Located about 50 km from New Delhi, on NH-1.</li> <li>• Has industrial units from the general engineering, malt, chemicals and cycle parts sectors.</li> </ul>
Ambala	<ul style="list-style-type: none"> <li>• Located about 200 km from New Delhi, on NH-1.</li> <li>• Has industrial units from the scientific instruments, electronic and light engineering sectors.</li> <li>• It also has a United Nation Development Programme (UNDP) assisted instrument design and development centre.</li> </ul>
Tohana	<ul style="list-style-type: none"> <li>• Located about 200 km from New Delhi.</li> <li>• Has industrial units from the agriculture implements, foundry and light engineering sectors.</li> </ul>
Jind	<ul style="list-style-type: none"> <li>• Located about 120 km from New Delhi.</li> <li>• Has process houses and light engineering units.</li> </ul>
Samalkha	<ul style="list-style-type: none"> <li>• Located about 70 km from New Delhi.</li> <li>• Has light engineering and foundry units.</li> </ul>
Rai (expansion is being planned)	<ul style="list-style-type: none"> <li>• Located about 35 km from New Delhi.</li> <li>• A food park has been developed here.</li> </ul>
Barwala (expansion is being planned)	<ul style="list-style-type: none"> <li>• Located at about 210 km from New Delhi, very close to Panchkula.</li> <li>• Has industrial units of plywood, pharmaceuticals units and light engineering work.</li> </ul>
<p>Other industrial estates under implementation are ancillary estates at Panchkula, Kalka, Murthal, integrated infrastructure development centre at Sirsa, built-up sheds near Sohna, and estates at Manakpur in Yamuna Nagar.</p>	

Source: HSIIDC Website

## Industrial Infrastructure - Upcoming Industrial Estates

Estate/Location	Brief Description
Kundli (expansion project)	<ul style="list-style-type: none"> <li>Land measuring around 450 acres has been acquired for expansion project and the development work is in progress.</li> </ul>
Bahadurgarh	<ul style="list-style-type: none"> <li>Located about 40 km from Delhi.</li> <li>HSIIDC has acquired around 675 acres land for setting up an industrial estate in Bahadurgarh (Jhajjar district).</li> </ul>
Industrial Growth Centre, Saha	<ul style="list-style-type: none"> <li>Located about 180 km from Delhi.</li> <li>Land measuring 415 acres has been acquired and developed, of which about 70 acres has been developed for the food processing industry.</li> </ul>
Hosiery Complex in Barhi (expansion is being planned)	<ul style="list-style-type: none"> <li>A hosiery and textile park already exists in Barhi near Ganaur, in Sonapat district, industrial complex is being planned as part of expansion.</li> </ul>
In addition, three more townships are being planned at Sampla, Badli-Jahangirpur and Ganaur-Samalkha.	

Source: HSIIDC Website

# Haryana

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## Key Industries

- The natural resources, policy incentives and infrastructure in the state support investments in sectors such as automobiles and auto components, IT/ITeS, textiles, agro-based industries, business tourism and commerce.
- Forming industrial clusters and developing infrastructure has been a key strategy of the state to attract investments in various industries.
- Gurgaon, Faridabad, Sonapat, Panipat, Panchkula, Ambala, Yamuna Nagar are some of the key industrial districts of Haryana.
- Haryana State Industrial and Infrastructure Development Corporation Limited (HSIIDC) is the state's premier industrial promotion and investment facilitation agency, responsible for providing reliable and efficient facilities for entrepreneurs investing in the state.

### Key Industries in Haryana

- Automotive
- Agro-based Industry
- IT/ITeS
- Textiles
- Oil Refining
- Bicycles
- Sanitary Ware
- Scientific Instruments
- Tourism
- Real Estate & Construction
- Biotechnology
- Petrochemicals

## Key Industries – Automotive Industry

... (1/2)

- Haryana is a preferred destination for auto majors and auto-component manufacturers. The state is a host to many large automotive players.
- The state produces two-third of the passenger cars, fifty per cent of tractors, sixty per cent of motor cycles and fifty per cent of refrigerators manufactured in the country.
- A significant percentage of the state's workforce is engaged in the automotive industry; important automobile centres are Gurgaon and Faridabad.
- The International Centre for Automotive Technology (ICAT) has been set-up at Manesar as a part of the National Automotive Testing and Research and Development (R&D) Infrastructure Project (NATRiP). It provides testing and R&D services to the industry.

### Some of the Key Players

- Maruti Suzuki India Ltd
- Yamaha Motor Pvt Ltd
- Escorts Group
- General Motors India Private Limited

## Key Industries – Automotive Industry ... (2/2)



### Maruti Suzuki India Ltd



- Maruti Suzuki India had a market share of around 40 cent in the Indian passenger car market at the end of March 2012. Its Gurgaon facility has three integrated plants with an installed capacity of around 900,000 units, the fourth plant is located at Manesar. The Gurgaon plant will eventually serve as a base for engine assembly and machining, while automobile assembly is done at the Manesar plant. The company had revenue of US\$ 7.59 billion in the year 2011-12.

### General Motors India Pvt Ltd



- General Motors India Private Limited, founded in 1996, is a wholly-owned subsidiary of General Motors and is engaged in the automobile business in India. Its subsidiary is Chevrolet Sales India Private Limited. It has its headquarters in Gurgaon. General Motors employs around 202,000 persons in 158 facilities across the world.

### Escorts Group



- Escorts is a leading engineering conglomerate in high growth sectors of agri machinery, construction and material handling equipment, railway equipment and auto-components. It has its corporate headquarters and manufacturing facilities for tractor assembly, transmission and engines, crankshaft and hydraulics in Faridabad.

### Yamaha Motor Pvt Ltd



- Yamaha Motors is a 100 per cent subsidiary of Yamaha Motor Company Limited, Japan. The company has more than 2,000 employees and has a countrywide network of over 400 dealers. It has a manufacturing plant in Faridabad, which supplies bikes to the domestic as well as the overseas market.

## Key Industries – IT/ITeS Industry ... (1/2)

- Gurgaon has emerged as a preferred destination for the IT Industry in north India.
- Haryana is among the leading states in terms of IT exports. In 2010-11, software exports made by registered units through STPI have reached US\$ 2.99 billion.
- Haryana is the first state to have implemented its State Wide Area Network (SWAN) for voice, data and video transmission. The SWAN vertical connectivity – at the State Network Management Centre (SNMC), District Network Management Centre (DNMC) and Block Network Management Centre (BNMC) – has been completed and is in operation.

STPI: Software Technology Parks of India

### Some of the Key Players

- IBM Global Process Services
- Tata Consultancy Services (TCS)
- Microsoft Corporation (I) Pvt Ltd
- Google



## Key Industries – IT/ITeS Industry ... (2/2)

### IBM Global Process Services



- IBM Global Process Services (formerly IBM Daksh) is a leading provider of business process solutions, with its corporate office in Gurgaon. The company has 23 service delivery centres at nine locations in India and Philippines, and employs more than 100,000 persons, making it one of the largest Business Process Outsourcing (BPO) vendors in India, in terms of headcount.

### Tata Consultancy Services (TCS)



- Tata Consultancy Services (TCS) is among the large providers of IT and Business Process Outsourcing (BPO) services in India. The company's clients are in the banking, financial services, healthcare and life sciences, insurance, manufacturing, media, entertainment, transportation, travel and hospitality, retail, utilities and energy resources sectors. It commenced its operations in Gurgaon in 1995. The company had a revenue of US\$ 10.17 billion in 2011-12.

### Microsoft Corporation (I) Pvt Ltd



- Microsoft entered India in 1990 and works closely with the Indian Government, IT industry, academia and the local developer community. Microsoft has offices in 10 cities: Ahmedabad, Bengaluru, Gurgaon, Chennai, Hyderabad, Kochi, Kolkata, Mumbai, New Delhi and Pune.
- Microsoft in India employs about 5,800 people and the six business units in India represent the complete Microsoft product lifecycle. In Haryana, Microsoft has two offices, both at Gurgaon.

### Google



- Google, a web-based search engine, is the flagship product owned by Google Inc. The special features offered by Google include synonyms, weather forecasts, time zones, stock quotes, maps, earthquake data, movie-show times, airports, home listings and sports scores etc.
- Google has a sales office in Gurgaon. It is a direct sales organisation and helps the world's biggest advertisers to enjoy immediate and accountable communication with the consumer. The sales teams here are structured according to industry verticals.

## Key Industries – Agro-based Industry

... (1/2)

- Agriculture is one of the biggest employment generators in rural Haryana with strong potential in value addition and exports.
- The Department of Horticulture is encouraging a cluster approach for the development of fruit cultivation.
- Dairy farming has huge potential in rural areas and is being promoted as a self-employment venture, the per capita milk availability in Haryana is the second highest in the country.
- Haryana aggressively promotes organic farming; financial assistance is provided to farmers for production and use of vermi-compost.
- Use of greenhouse technology is being encouraged to promote disease-free nursery and production of off-season fruits and vegetables.

### Some of the Key Players

- Nestle India Ltd
- GlaxoSmithKline Consumer Healthcare Ltd (GSK)
- Haldiram's Foods International Ltd
- PepsiCo India

## Key Industries – Agro-based Industry ... (2/2)

### Nestle India Ltd



→ Nestle India, is a subsidiary of Nestle SA, Switzerland. It has its Indian headquarter at Gurgaon in Haryana. It has famous brand names in India such as Nescafe, Maggi, Milkybar, Milo, Kit Kat, Bar-One, Milkmaid, Nestea, Nestle Milk, Nestle Fresh 'n' Natural Dahi and Nestle Jeera Raita. The company has a factory at Samalkha in Panipat, which was commissioned in 1993, to manufacture milk products.

### GlaxoSmithKline Consumer Healthcare Ltd (GSK)



→ GlaxoSmithKline Consumer Healthcare Ltd (GSKCH) is an Indian group company/associate of GlaxoSmithKline UK and one of the largest players in the health-food drinks industry in the country, GSK has a factory at village Khewra in Sonapat; has a capacity of 26,100 tonnes per annum for its health foods brand, Horlicks.

### Haldiram's Foods International Ltd



→ Haldiram's was started in Bikaner and is one of India's largest sweets and snacks manufacturers. It sells packaged products which are not only consumed in domestic markets but also exported to various countries viz., Pakistan, Canada, Australia, Sri Lanka, Singapore, Malaysia, South Africa, Indonesia, Qatar, Hong Kong, Japan, Kenya, Libya and South Korea. Haldiram also has its own outlets where it sells sweets and eatables. In Haryana, Haldi Ram Manufacturing Co Private Limited is located in village Kherki Duala on the Delhi-Jaipur highway.

### PepsiCo India



→ PepsiCo established its business operations in India in 1989. The company has a diverse range of products including carbonated drinks, potato chips, etc. It employs 6,400 people and provides indirect employment to almost 200,000 people. It has 38 beverage bottling plants and three food plants in the country. It has its corporate office in Gurgaon.

## Key Industries – Textiles ... (1/2)

- Abundant availability of raw materials gives Haryana a competitive advantage in the textile sector – cotton production in 2011-12 was around 2.6 million bales (bales of 170 Kgs each).
- Cotton productivity in 2011 (Kharif season) was around 739 kg per hectare.
- Readymade garments worth US\$ 1,316.6 million are exported from Haryana annually, providing employment to around one million workers.
- A cluster of high-fashion readymade garments units have come up in the well-developed industrial area of Udyog Vihar, Gurgaon.

### Some of the Key Players

- DCM Textiles
- Benetton India Pvt Ltd
- Orient Craft Ltd
- Pearl Global Ltd

## Key Industries – Textiles ... (2/2)

### DCM Textiles



- The company is engaged in the manufacturing of 100 per cent grey cotton yarn and melange yarn. It has a spinning mill located in Hisar with an installed capacity of 74,436 spindles. The company exports to 25 countries which includes: Spain, Portugal, Egypt, South Korea, Brazil, Hong Kong, Italy, Israel, etc.

### Benetton India Pvt Ltd



- Benetton India is a wholly-owned subsidiary of the Benetton Group, Italy. United Colors of Benetton is among the market leaders in branded apparel, with around 480 stores across 100 cities. The company has a manufacturing unit in Gurgaon.

### Orient Craft Ltd



- The company is located in Gurgaon and employs around 5,000 people; has established itself as a premium exporter of textiles from Haryana. It has embarked on an initiative to set-up a textile-focused SEZ in Gurgaon. This SEZ will provide employment to around 50,000 people.

### Pearl Global Ltd



- Pearl Global Limited is the subsidiary of House of Pearl Fashions Limited Group, which is among the pioneers of ready-to-wear apparel industry in India.
- The company has six fully-integrated manufacturing plants in Gurgaon, which are capable of producing value-added woven and knitted garments. The total factory area in north India covers more than 310,000 sq ft of space. The installed capacity on a single-shift basis stands at 10 million pieces per annum. The units specialise in casual-wear dresses, ladies blouses in both woven and knits. The important customers of the company include Gap Inc, JC Penney, Kohls, Next, H&M, and Esprit.

## Key Industries – Petrochemicals ... (1/2)

- The petrochemicals-hub at Panipat is a 5,000-acre project, which is jointly set-up by HSIIDC and Indian Oil Corporation Limited (IOCL). It is expected to drive the growth of the petrochemicals industry in north India.
- The new complex is a dedicated industrial zone for downstream industries and is likely to attract an investment of US\$ 5.21 billion.
- The State Government, in collaboration with the Central Government, aims to set up the 'Central Institute of Plastic and Engineering Technology' in Murthal (district Sonipat) to undertake R&D and create skilled manpower for the development of petrochemicals industry.

### Key Player

- Indian Oil Corporation Limited (IOCL)

## Key Industries – Petrochemicals ... (2/2)

### Indian Oil Corporation Ltd (IOCL)



- Indian Oil Corporation Limited (IOCL) manufactures petroleum products, crude oil, lubricants, grease, oil base, additives and others.
- IOCL has a refinery at Panipat which is its seventh refinery. The refinery was set up in 1998 at a cost of US\$ 848 million with a capacity of 6 million metric tonnes per annum (MMTPA). Panipat refinery has increased its refining capacity from 6 MMTA to 15 MMTA with the commissioning of its expansion project.
- Kandla-Bhatinda product pipeline converted to crude oil service, was renamed as Mundra-Panipat pipeline in 2006. The Mundra-Panipat pipeline augmentation was commissioned in 2009 at a cost of US\$ 34.80 million.
- Naphtha cracker complex was set up adjacent to the Panipat refinery with an investment of US\$ 3.04 billion in March 2010.

## Key Industries – Real Estate and Construction ... (1/2)

- The real estate and construction industry has been growing at a rapid pace in Haryana, growth in real estate encompasses activities in the residential, commercial and hospitality space.
- Real Estate Development Council (REDCO) is the apex body for all stakeholders in the housing and construction industry, it was launched jointly by the Government of Haryana and the Ministry for Urban Development, Government of India.
- Gurgaon accounts for more than 70.0 per cent of the new commercial space coming up in the National Capital Region (NCR).
- Gurgaon is one of the fastest developing cities in the world.

### Some of the Key Players

- DLF Ltd
- Unitech Group
- Ansal Housing & Construction Ltd
- Emaar MGF Land Ltd

## Key Industries – Real Estate and Construction ... (2/2)

### DLF Ltd



- DLF Group is one of the largest real estate players in India. The group is responsible for the development of 22 urban colonies, as well as an entire integrated 3,000 acre township DLF City in Gurgaon.
- In August 2009, the foundation stone was laid for the first private metro rail project in the country. It is to be developed in Gurgaon by the DLF-IL&FS consortium. The 6.1 km rapid metro rail project will be operational in April 2013.

### Unitech Group



- Unitech is one of the largest real estate player, which has executed projects in Gurgaon with world-class service facilities. They include Nirvana Country, Unitech World, Unitech Trade Centre, Unitech Business Park, Millennium Plaza (jointly developed with Vipul), Signature Towers and Global Business Park (jointly developed with Vipul).

### Ansal Housing & Construction Ltd



- Ansal Group has expanded its activities from real estate development to high-value construction.
- It is present in Gurgaon through several projects in both the residential and commercial space.
- The group presently employs over 5,000 persons.

### Emaar MGF Land Ltd



- Emaar MGF is a joint venture between Emaar Properties PJSC Dubai, a leading global real estate company, and MGF Development Limited, one of the leading real estate developer.
- Has several housing and commercial projects in the state.

## Key Industries – Biotechnology ... (1/2)

- The Government of India has selected Haryana for establishment of a bio-technology park along with R&D facilities besides promoting the establishment of pharma industrial park.
- Establishment of research centres and laboratories in collaboration with the private sector is being encouraged.
- Haryana is setting up biotechnology science clusters at Faridabad at an investment of US\$ 0.2 billion during the 11th and 12th plan period.

### Key Players

- Proagro Seeds Company Private Limited
- Eli Lilly Company (India) Private Limited
- Ranbaxy Laboratories
- Venus Remedies Limited

## Key Industries – Biotechnology ... (2/2)

### Proagro Seeds Company Pvt Ltd



→ Proagro Seeds Company Private Limited is a company of the Bayer CropScience Group. Proagro Seeds is a leading seed company in India. It is engaged in breeding, development, production and marketing of high quality hybrid field seeds.

→ The company has a biotech laboratory in Gurgaon where genetic markers, DNA finger printers and other tested techniques are used to support the company's plant breeding efforts.

### Eli Lilly and Company (I) Pvt Ltd



→ Eli Lilly and Company (India) Private Limited is a subsidiary of the US pharmaceutical major, Eli Lilly and Co. It focuses primarily on diabetes, oncology, acute coronary syndrome, critical care, osteoporosis and growth hormones and has more than 550 employees across India.

→ In India, Eli Lilly has based its operations in Gurgaon and conducts clinical trials of biotech drugs with its overall range, in India.

### Ranbaxy Laboratories



→ The company manufactures and markets branded and generic pharmaceuticals and Active Pharmaceutical Ingredients (API). In 2011, the company's revenue was around US\$ 2 billion.

→ It is based in Gurgaon, has around 14,000 employees worldwide with around 1,300 research personnel.

→ The R&D centres in Gurgaon focus on novel drug delivery systems, new drug discovery and development functions.

### Venus Remedies Ltd



→ Venus Remedies Limited is among the 10 leading fixed-dosage injectable manufacturers in the world. The company has presence in 60 countries and covers more than 75 products. The company had revenue of US\$ 83.93 million in 2011-12.

→ The company's' first manufacturing unit commenced operation in 1991 in Panchkula, Haryana. It manufactures products in the Antibiotics, Total Parenteral Nutrition (TPN), Neuro and other super specialty therapeutic segments in the Panchkula unit.

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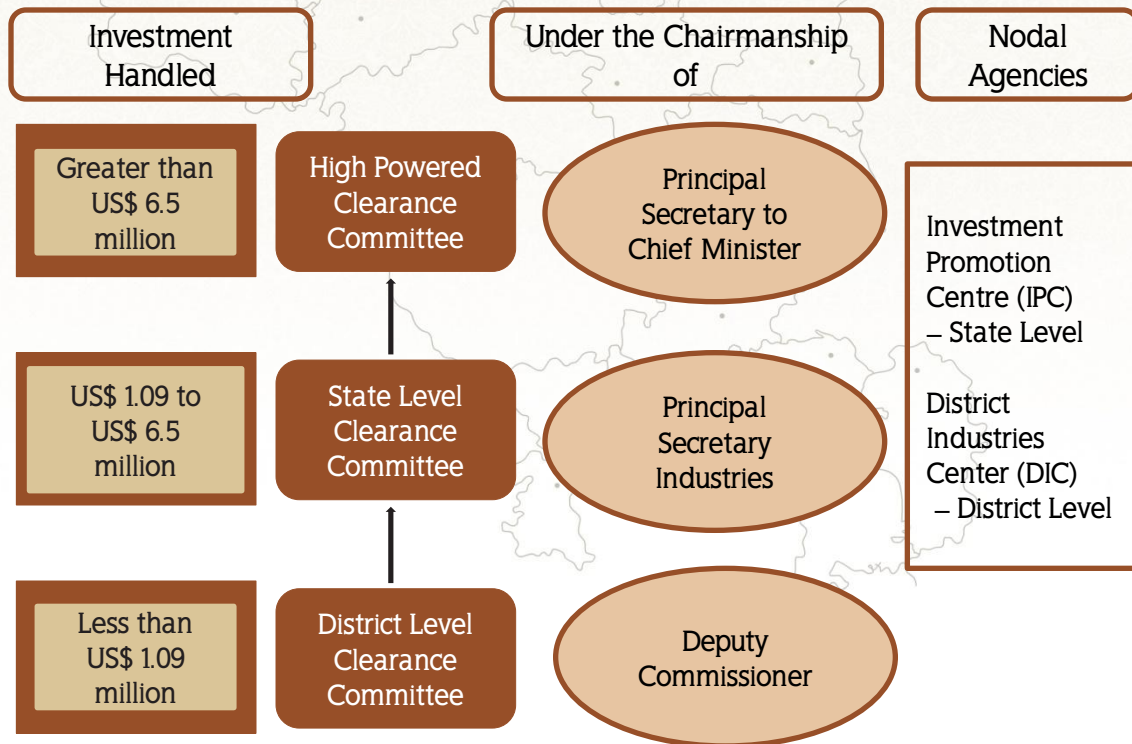
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## Single-Window Clearance Mechanism

- Single-window clearance mechanism was established under the Haryana Industrial Promotion Act, 2005. It has a three-tier structure to grant exemption/relaxation from any of the provisions/rules of the Act.
- The Investment Promotion Centres (IPC) located in New Delhi and Chandigarh and the District Industries Centres (DIC) at the district level act as the nodal agencies and provide support to the committees.



## Key Investment Promotion Offices

Agency	Description
Haryana State Industrial and Infrastructure Development Corporation Limited (HSIIDC)	<ul style="list-style-type: none"> <li>• Focuses on the development of medium and large-scale industries.</li> <li>• Provides financial assistance by way of term loans, equipment re-finance, equipment leasing and working capital.</li> </ul>
Haryana Agro Industries Corporation Limited (HAIC)	<ul style="list-style-type: none"> <li>• Has been engaged in trading activities such as sale of seeds, fertilizers, pesticides, tractors and other agricultural machinery at economical prices to the farming community.</li> </ul>
Haryana State Electronics Development Corporation Limited (HARTRON)	<ul style="list-style-type: none"> <li>• It is the nodal agency of the Haryana Government for promoting electronics and IT industries.</li> <li>• It offers its expertise in infrastructure development as well as promotion of projects.</li> </ul>
Haryana Urban Development Authority (HUDA)	<ul style="list-style-type: none"> <li>• Is responsible for promoting and securing development of urban areas; activities include land acquisition, development, and sale of property for residential, industrial and commercial purposes.</li> </ul>
Haryana Finance Corporation (HFC)	<ul style="list-style-type: none"> <li>• Meets the credit needs of small and medium scale industrial units by advancing term loans.</li> </ul>



## Contact List

Agency	Contact Information
Haryana State Industrial and Infrastructure Development Corporation Limited (HSIIDC)	Plot No C-13-14, Sector 6, Panchkula-134109 Phone: 91-172-2590 481 Fax: 91-172-2590 474 E-mail: info@hsiidc.org Website: www.hsiidc.org
Haryana Urban Development Authority (HUDA)	C-3, Sector-6, Panchkula Phone: 91-172-2567 857 E-mail: huda@hry.nic.in Website: www.huda.gov.in
Haryana Finance Corporation (HFC)	Bays 17-18-19, Sector 17-A, Chandigarh-160017 Phone: 91-172-2702 755-57 Fax: 91-172-2702 666 E-mail: mdhfc@airtelmail.in Website: www.hfcindia.org
Haryana State Electronics Development Corporation Limited (HARTRON)	SCO-111-113, Sector 17-B, Chandigarh -160017 E-mail: hartron@hartron.org Website: www.hartron.org

## Key Approvals Required



Approvals and Clearances Required	Department	Estimated Time
Site Clearances and No-objection Certificate	Department of Environment/ Haryana Pollution Control Board	Site and/or environment clearance: 60 days No-objection certificate to establish: 7 days No-objection certificate to operate: 30 days Renewal of consent: 21 days
Approval, No-objection Certificate and Change of Industrial Land	Department of Town and Country Planning	Change of land use in industrial zone: 30 days No objection certificate for establishment of industrial unit under the Urban Area Act: 15 days Approval of building plan: 30 days
Approval and Licence	Labour Department/ Chief Inspector of Factories	Approval of factory plan under the Factories Act, 1948 (Act 63 of 1948): 90 days Licence for running factory: 15 days
Release of Power Connection	Uttar Haryana Bijli Vitran Nigam / Dakshin Haryana Bijli Vitran Nigam	Load up to 20 KW: 21 days Load up to 70 KW: 45 days Load above 250 KW: 60 days Load above 1 MW: 60 days
Sales Tax	Excise and Taxation	Sales Tax Registration: 15 days

## Cost of Doing Business in Haryana

Cost Parameter	Cost Estimate	Source
Industrial Land Purchase (per sq m)	US\$ 400 to US\$ 700 at IMT, Manesar US\$ 500 to US\$ 1,650 in Gurgaon	Industry Sources
Office Space Rent (per sq ft)	Gurgaon: US\$ 1.4 to US\$ 3.1 per month	Industry Sources
Residential Rent (2,000 sq ft)	Gurgaon: US\$ 480 to US\$ 1,625 per month	Industry Sources
Five-Star Hotel Room Rent	US\$ 140 to US\$ 240 per room per night	Leading Hotels in the State
Power (per kWh)	Industrial: US 9.1 cents to US 11.1 cents	Haryana Electricity Regulatory Commission
Water (per 1,000 litres)	US 7 cents	Water Supply and Sanitation Department
Labour (minimum wage per day)	US\$ 3.8 to US\$ 4.3	Ministry of Labour and Employment, Government of India

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## State Acts & Policies ... (1/2)

### Industrial and Investment Policy 2011

#### Objective

- To achieve higher, sustainable and inclusive economic growth by attracting investments in a focused and structured manner in potential areas.

[Read more](#)

### Haryana Special Economic Zone (Amendment) Act 2010

#### Objective

- To amend the Haryana Special Economic Zone Act, 2005.

[Read more](#)

### Haryana Tourism Policy 2008

#### Objective

- To increase the earnings from tourism inflow at the rate of 10.0 per cent, annually, and promote sustainable tourism by encouraging a constructive and mutually beneficial partnership between the public and private sectors for economic development and employment generation.

[Read more](#)

## State Acts & Policies ... (2/2)

### Haryana Special Economic Zone (SEZ) Act 2005

#### Objective

- To promote industrial townships with world-class infrastructure and create a conducive investment climate for export promotion.

[Read more](#)

### Information Technology Policy (IT Policy) 2000

#### Objective

- To encourage replacement of traditional public-service delivery systems by IT-driven governance, with the private sector providing the infrastructure, framework and enabling environment.

[Read more](#)

## Annexure

### Exchange Rates

Year	INR equivalent of one US\$
2004-05	44.95
2005-06	44.28
2006-07	45.28
2007-08	40.24
2008-09	45.91
2009-10	47.41
2010-11	45.57
2011-12	47.94

Average for the year

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