Investment climate of a state is determined by a mix of factors

**Regulatory Framework**
- Procedures for entry and exit of firms
- Industrial regulation, labour regulation, other government regulations
- Certainty about rules and regulations
- Security, law and order situation,

**Resources/Inputs**
- Skilled and cost effective labour
- Labour market flexibility
- Labour relations
- Availability of natural resources
Investment climate of a state is determined by a mix of factors

**Incentives to Industry**
- Tax incentives and exemptions
- Investment subsidies and other incentives
- Availability of finance at cost effective terms
- Incentives for FDI
- Profitability and incentives to industry

**Physical & Social Infrastructure**
- Condition of physical infrastructure like power, water, roads etc
- Information infrastructure such as telecom, IT, etc
- Social infrastructure like educational and medical facilities
Focus of this presentation

• Haryana’s performance on key Socio-economic indicators
• Availability of social and physical infrastructure in the state
• Policy Framework and Investment approval mechanism
• Cost of doing business
• Key industries and players
HARYANA’S PERFORMANCE ON KEY SOCIO-ECONOMIC INDICATORS
Haryana’s economic performance is driven by all three sectors of the economy

- The state’s GDP grew an impressive 12.73% between 1999-00 and 2005-06 to reach US$ 22.37 billion
- The Tertiary sector, has been the fastest growing, driven by growth in sub-sectors like IT and ITES
- Secondary sector growth driven by manufacturing in sub-sectors like automobile and auto components, light engineering, textiles, among others
Households in the State have High Disposable Incomes

- The per capita income of Haryana is US$ 862.90, while the All-India average is US$ 573.10 (year 2006)
- The State has the Minimum gap between Rural and Urban prosperity in the country
- Distribution of households by income shows that share of households in higher income categories in Haryana is greater than for All-India, a trend common for rural as well as urban households
- In Ownership of Assets like two/four wheelers and consumer electronics, Haryana is ahead as compared to All-India levels

Source: The Market Skylilne of India 2006 by Indicus Analytics
Households in the State have High Disposable Incomes

Percentage Households with Asset Ownership

Four-wheelers

- Haryana: 5%
- All-India: 4%

Source: The Market Skyline of India 2006 by Indicus Analytics

Television

- Haryana: 67%
- All-India: 41%

Source: The Market Skyline of India 2006 by Indicus Analytics

Two Wheelers

- Haryana: 25%
- All-India: 18%

Source: The Market Skyline of India 2006 by Indicus Analytics

Electricity

- Haryana: 91%
- All-India: 64%

Source: The Market Skyline of India 2006 by Indicus Analytics
Large and Medium sized units constitute three-fourths of Production

- The state produces two-third of passenger cars, 50% of tractors, 60% of motor cycles, 50% of refrigerators and 25% of sanitary-ware manufactured in the country
- The Small Scale Industry (SSI), is providing repair services for capital goods and is manufacturing metal products, leather and fur products, food products, wooden furniture, etc

Cargo handled at Airports (figures in tons)

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Large &amp; Medium Industries</th>
<th>Small scale units</th>
</tr>
</thead>
<tbody>
<tr>
<td>Working units (No.)</td>
<td>1,212</td>
<td>80,000</td>
</tr>
<tr>
<td>Production (US$ billion)</td>
<td>3.0</td>
<td>1.0</td>
</tr>
<tr>
<td>CAGR of production (2000-05)</td>
<td>5,350</td>
<td>360</td>
</tr>
<tr>
<td>Fixed investment (US$ billion)</td>
<td>200</td>
<td>870</td>
</tr>
<tr>
<td>Employment (‘000 number)</td>
<td>1,212</td>
<td>80,000</td>
</tr>
</tbody>
</table>

Source: Haryana State Industrial and Infrastructure Development Corporation Limited (HSIIDC)
Large and Medium sized units constitute three-fourths of Production

Key industries in Haryana

- Automotive and Auto components
- Bicycles
- Ceramics and construction material
- Electronic Goods
- Food Products
- Textiles
- IT/ITES
- Oil Refining
- Sanitary-ware
- Scientific instruments
- Stainless Steel

Distribution of households by income percent

Source: The Market Skylilne of India 2006 by Indicus Analyticscs
Haryana has witnessed a strong inflow of investments in Construction and Electricity generation

- **Investment** of roughly US$ 55.23 billion had come to the state as on March 31, 2007, of which 65% is under implementation.

- **Maximum investments** have come in Construction sector (mainly real estate and road construction), followed by Electricity, Manufacturing and Services.

- Haryana reported 620 Outstanding projects as of quarter ended March 2007, of which 166 were at the implementation stage and the remaining under announcement or proposal stage.

![Breakup of Investments by sector](image-url)

The top 10 districts constitute 76% of production

<table>
<thead>
<tr>
<th>District</th>
<th>Share in production (per cent)</th>
<th>Industries</th>
</tr>
</thead>
<tbody>
<tr>
<td>Faridabad</td>
<td>30.0</td>
<td>Tractors, motorcycles, switch gears, refrigerators, footwear, tyres, consumer durables</td>
</tr>
<tr>
<td>Gurgaon</td>
<td>27.0</td>
<td>IT/ITES, automobiles, automobile parts, hardware, sports goods, rubber products, readymade garments, telecommunication equipments, food items, air conditioners, electrical goods, light engineering goods, pharmaceuticals, footwear, Chemicals</td>
</tr>
<tr>
<td>Ambala</td>
<td>5.1</td>
<td>Hosiery, scientific and surgical instruments, metal casting, kitchen mixer grinders, submersible motor pumps, textiles</td>
</tr>
<tr>
<td>Sirsa</td>
<td>4.0</td>
<td>Seed processing, wrapping papers, milk chilling, rice shelling, chemicals, iron and steel fabrication, agriculture implements, leather goods, hard and straw board</td>
</tr>
<tr>
<td>Panipat</td>
<td>3.9</td>
<td>Cotton yarn, staple yarn, terry towels, soft drinks, hatcheries, handloom goods, foundry products, urea, petrochemicals, power, handloom, power loom, dyeing/ processing, agro based industries, foundries, textile machinery, nuts and bolts</td>
</tr>
<tr>
<td>Karnal</td>
<td>2.4</td>
<td>Textiles, agro-based industries, leather products, floriculture, electronic motors, wooden and steel furniture</td>
</tr>
<tr>
<td>Yamuna Nagar</td>
<td>1.5</td>
<td>Textiles, sugar, wood based industries, cement, steel, stone crushing</td>
</tr>
<tr>
<td>Bhiwani</td>
<td>1.0</td>
<td>Textiles</td>
</tr>
<tr>
<td>Hisar</td>
<td>0.9</td>
<td>Stainless steel, automobile repair, textiles, handlooms, pipes, food processing, cotton ginning and oil, engineering components, leather goods</td>
</tr>
<tr>
<td>Jind</td>
<td>0.3</td>
<td>Agro based industries, sugar mills, live-stock based industries, woollen blankets, foundry</td>
</tr>
<tr>
<td>Others*</td>
<td>23.9</td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>100</td>
<td></td>
</tr>
</tbody>
</table>

*Others include Kurukshetra, Sonipat, Fatehabad, Rohtak, Kaithal, Narnaul, Bahadurgarh, Rewari, Panchkula and Mewat

Source: Department of Industries, Government of Haryana
AVAILABILITY OF SOCIAL AND PHYSICAL INFRASTRUCTURE IN THE STATE
Skilled as well as Unskilled labour is available in the state

• Agricultural workforce in Haryana is 13 million
• Almost 60% of the workforce in Organised sector is employed in public sector organisations and the remaining in private sector
• The Minimum wage of industrial workers is amongst the Highest in the country
• At present, the Minimum wage of Unskilled workers has been fixed at US$ 52.2 per month and about US$ 2 per day
• The State Government Labour Department has set standards and norms for ensuring labour safety
Social infrastructure in the form of Educational Institutes and Medical Institutions is Strong

Education infrastructure

- Every year, more than 30,000 students pass out from the technical and non-technical institutions
- Primary education is strong with a primary school within 1.08 kilometre radius of each village
- The annual plan budget allocation for the year 2006-07 on education has been increased to US$ 11.12 million from US$ 6.22 million in the previous year.

<table>
<thead>
<tr>
<th>AvAILABILITY oF SOCIAL AND PHYSICAL INFRASTRUCTURE IN THE STATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>HARYANA • January 2007</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Status of Educational Institutes</th>
</tr>
</thead>
<tbody>
<tr>
<td>7 Universities</td>
</tr>
<tr>
<td>44 Engineering Colleges</td>
</tr>
<tr>
<td>30 MCA Colleges</td>
</tr>
<tr>
<td>28 MBA Colleges</td>
</tr>
<tr>
<td>19 Pharmacy Colleges</td>
</tr>
<tr>
<td>53 Polytechnic</td>
</tr>
<tr>
<td>355 Under Graduate Colleges</td>
</tr>
<tr>
<td>75 Post Graduate College</td>
</tr>
</tbody>
</table>

IBEF
INDIA BRAND EQUITY FOUNDATION
Social infrastructure in the form of Educational Institutes and Medical Institutions is Strong

Medical Infrastructure

• The State has about 90 Hospitals and dispensaries, 85 Community Health Centres, 400 Primary Health Centres, 2,400 Sub-centres and 15 Tuberculosis centres

• The Per Capita Expenditure on health has increased from US$ 4.11 in 2004-05 to US$ 5.41 in 2006-07.

Comparison of Health Indicators

<table>
<thead>
<tr>
<th></th>
<th>Haryana</th>
<th>All-India</th>
</tr>
</thead>
<tbody>
<tr>
<td>Birth rate</td>
<td>25.1</td>
<td>24.8</td>
</tr>
<tr>
<td>Death rate</td>
<td>6.6</td>
<td>8.1</td>
</tr>
<tr>
<td>Infant mortality rate</td>
<td>42</td>
<td>63</td>
</tr>
<tr>
<td>Life expectancy at birth (years)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Male</td>
<td>65.5</td>
<td>64.1</td>
</tr>
<tr>
<td>Female</td>
<td>70.0</td>
<td>65.4</td>
</tr>
</tbody>
</table>

Source: Economic Survey of Haryana
Haryana has amongst the Best infrastructure for Collection of Savings and Disbursal of Credit

• The credit to deposit ratio was 65% and the State has achieved 107.4% of the set target of the annual credit plan for 2006-07

• Haryana State Cooperative Agricultural and Rural Development Bank is the prime lender for agriculture related activities in rural areas

• Haryana Finance Corporation and Haryana State Co-operative Apex Bank Limited are the other agencies providing finance facilities

Financial Institutions in Haryana

<table>
<thead>
<tr>
<th>Financial Institution</th>
<th>Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Co-operative Societies</td>
<td>18,424</td>
</tr>
<tr>
<td>Primary Agricultural Credit Societies</td>
<td>2,433</td>
</tr>
<tr>
<td>Post Office Saving Banks</td>
<td>2,650</td>
</tr>
<tr>
<td>Indian Commercial Banks</td>
<td>1,726</td>
</tr>
<tr>
<td>Co-operative Banks</td>
<td>373</td>
</tr>
</tbody>
</table>

Source: Reserve Bank of India
Transport Infrastructure is Adequate and is also being Upgraded

Rods

- Haryana has 23,426 km of roads with nearly 1,479 km of National highways
- Among the Few States with 100% connectivity of rural areas with metalled roads
- The Haryana Roadways, with its fleet of nearly 3,400 Buses, is one of the Biggest state road transport undertakings in the country
- National Highways 1, 2, 8, 10 and 22 pass through the state
Transport Infrastructure is Adequate and is also being Upgraded

Civil Aviation

• The Indira Gandhi International Airport in New Delhi is in close proximity to Gurgaon
• Domestic Airport is located in the shared capital of Chandigarh
• There are civil aerodromes at Pinjore, Karnal, Hisar, Bhiwani and Narnaul
Transport Infrastructure is Adequate and is also being Upgraded

Railways

• Haryana is well connected to the network of Indian Railways, railway route length in the state is roughly 1,595 kilometres

• Main railway routes: Amritsar-Delhi, Rewari-Ahmedabad, Bhiwani-Rohtak-Delhi, Ambala-Ferozepur, Delhi-Ferozepur, Kalka-Jodhpur, Kalka-Howrah, Amritsar-Howrah and Delhi-Shimla
The Situation in the Power sector and Telecommunication is encouraging

Power

• Haryana was the First state in the country to achieve 100% rural electrification way back in 1970

• The installed generation capacity as on 31st March 2006 was 4,033 MW, most of it being Thermal power

• The Major consumer of electricity is the domestic sector accounting for about 78% of the power consumption

• The Per Capita consumption of electricity is 660 kWh, much higher than the All-India average of 390.3 kWh

• To increase the Availability of Power, the Government is encouraging investments from the private sector for capacity generation, improvement in operational efficiency and extension of distribution network
The Situation in the Power sector and Telecommunication is encouraging

Telecommunications

- According to estimates by Telecom Regulatory Authority of India, Haryana has a strong cellular subscriber base of 3.88 million as on June 2007
- The state has 1,026 Telephone exchanges, 2,329 Post offices in the rural areas and 317 in urban areas
Industrial Infrastructure is being built up

• The State Government has enacted the Haryana Industrial Promotion Act 2005 for industrial development

• The industrial infrastructure in Haryana is being developed through state agencies like HSIIDC and Haryana Urban Development Authority (HUDA) as well as private players
Industrial Infrastructure is being built up

<table>
<thead>
<tr>
<th>Infrastructure</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Export Promotion Industrial Park</td>
<td>This Park, along the Haryana-Delhi border, is meant for export oriented units in sectors like food processing, leather garments and accessories, electronics, telecommunications, automotive, auto parts, sports goods, handloom and ready-made garments</td>
</tr>
<tr>
<td>Food Parks</td>
<td>Food Parks have been set up at Saha in Ambala, Rai in Sonipat, Narwana and Dabwali, to provide necessary facilities for food processing and food packaging industry</td>
</tr>
<tr>
<td>Gems and Jewellery Park</td>
<td>Gems and Jewellery Park has been created at Udyog Vihar in Gurgaon to promote the gems and jewellery industry</td>
</tr>
<tr>
<td>Industrial Model Townships (IMT)</td>
<td>IMT Manesar is being developed as a prominent cluster of automobiles and auto components. It has industrial, residential, commercial and recreational facilities</td>
</tr>
<tr>
<td>Industrial Clusters</td>
<td>These include the scientific instruments cluster at Ambala, the metal industry cluster at Jagadhri, agricultural implements and rice milling clusters at Karnal, pharmaceutical cluster at Sonipat and chemicals cluster at Bahadurgarh</td>
</tr>
<tr>
<td>Warehouse Complex/ Inland Container Depots</td>
<td>The state has 3 Inland Container Depots (ICDs) located at Faridabad, Panipat and Rewari. Many more sector ICDs are coming up in the state</td>
</tr>
<tr>
<td>Special Economic Zones (SEZs)</td>
<td>Haryana has 8 notified SEZs, 29 SEZs with formal approval and 28 SEZs with in-principle approval.</td>
</tr>
</tbody>
</table>
POLICY FRAMEWORK AND INVESTMENT APPROVAL MECHANISM
Key Nodal Agencies in Haryana

Haryana State Industrial and Infrastructure Development Corporation Limited (HSIIDC)

• Focuses on the development of medium and large-scale industries
• Provides financial assistance by way of term loans, equipment re-finance, equipment leasing and working capital

Haryana Agro Industries Corporation Limited (HAIC)

• Has been engaged in trading activities such as sale of seed, fertilisers, pesticides, tractors and other agricultural machinery at economical prices to the farming community
Key Nodal Agencies in Haryana

Haryana State Electronics Development Corporation Limited (HARTRON)

• Is the Nodal agency of the Haryana Government for promoting the Electronics and IT industries
• Offers its expertise in infrastructure development as well as promotion of projects

Haryana Urban Development Authority (HUDA)

• Is responsible for promoting and securing Development of urban areas and has the Powers to acquire, develop and sell property for residential, industrial and commercial purposes

Haryana Finance Corporation (HFC)

• Meets the credit needs of Small and Medium scale industrial units by advancing term loans
Attractive investment climate in the State being created through investment friendly policies, including sector specific policies

Industrial Policy 2005
Aims to achieve the creation of an efficient, investor friendly environment and speedy clearances of new projects

Key initiatives under this Policy include the following

• Developing economic hubs and encouraging private partnership in the development of infrastructure

• Focusing on economic activities where the state enjoys comparative advantage (like food processing industry and IT)

• Developing the services sector (i.e. tourism, transport, education, health care services and financial services)
Attractive investment climate in the State being created through investment friendly policies, including sector specific policies

Industrial Policy 2005

- Creating an investor-focused approach in administrative processes, strengthening the grievance redressal mechanism
- Providing subsidy to electronics units, agro and food processing units and projects being set up in backward areas
- Exemption from payment of electricity duty for a period of 5 years to all new industrial units except those in the negative list
Attractive investment climate in the State being created through investment friendly policies, including sector specific policies

The Haryana SEZ Act 2005

Aims at promoting industrial townships with World-Class Infrastructure and Creating a conductive investment climate for Export Promotion

Thrust areas include

- Project Approval Committee, which approves, modifies or rejects the application for setting up the SEZ
- Exemption from payment of any tax, duty, fees, cess and other levies provided
- The Developer is bound to provide Rehabilitation of population by providing built up houses, residential plots and amenities
Attractive investment climate in the State being created through investment friendly policies, including sector specific policies

**Information Technology Policy 2000**

Aims to encourage replacement of traditional delivery system of public services by IT driven systems of governance, with private sector providing infrastructure, framework and enabling environment

- Constitution of a state level steering committee, IT Prism, responsible for setting priorities for sectors to be taken up for computerisation, reviewing progress of various government departments and approving budget
- Setting up of a Separate Secretariat for Information Technology to monitor implementation of IT initiatives
Attractive investment climate in the State being created through investment friendly policies, including sector specific policies

Information Technology Policy 2000

- Setting up of a Facilitation Committee of State government officials and people from the IT industry to coordinate and facilitate private investments in the industry
- Establishment of an IT initiative fund for developing replicable and reusable models of e-Governance and application enabling technologies
Attractive investment climate in the State being created through investment friendly policies, including sector specific policies

Information Technology Policy 2000

- Introduction of SMART Card based citizens ID with Multi-functions that enable citizens to interact with services, make payments online, act as a Voter ID, obtain ration card, passport, driving licence and vehicle registration, etc.

- Preferential treatment for allotment of land and power IT units in all industrial areas developed by state agencies
Attractive investment climate in the State being created through investment friendly policies, including sector specific policies

Information Technology Policy 2000

- Total exemption from payment of electricity duty for captive power generation sets installed by the IT industry
- Escort services and single desk clearance for obtaining easy clearances and approvals, with On-line clearance and support network linking all the related departments
Three-tier Single Window Clearance mechanism exists to facilitate speedy implementation of industrial projects

- Single Window Clearance mechanism established under the Haryana Industrial Promotion Act 2005, with a three-tier structure to grant exemption/relaxation from any of the provisions/rules of the Act
- The Investment Promotion Centres at New Delhi and Chandigarh and the District Industries Centre at the district level act as the nodal agencies to provide support to the various committees
## Concerned Agencies & Time estimates for starting business in Haryana

<table>
<thead>
<tr>
<th>Service/Facility</th>
<th>Concerned Agency</th>
<th>Timelines</th>
</tr>
</thead>
<tbody>
<tr>
<td>Site Clearances and No Objection</td>
<td>Department of</td>
<td>Site/environment clearance: 60 days</td>
</tr>
<tr>
<td>Certificate</td>
<td>Environment</td>
<td>No Objection Certificate to establish: 7 days</td>
</tr>
<tr>
<td></td>
<td></td>
<td>No Objection Certificate to operate: 21 days</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Renewal of consent: 30 days</td>
</tr>
<tr>
<td>Licence, registration and change of</td>
<td>Department of</td>
<td>Letter of intent/industrial licence: 15 days</td>
</tr>
<tr>
<td>industrial land</td>
<td>Industries</td>
<td>Permanent registration as SSI: 7 days</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Grant benefit of sales tax concessions: 90 days</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Allotment of Plot: 30 days</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Change of Industrial Land: 30-60 days</td>
</tr>
<tr>
<td>Incentives</td>
<td>Department of</td>
<td>Sanction at local level: 30 days</td>
</tr>
<tr>
<td></td>
<td>Industries</td>
<td>Sanction at head quarter/state level: 45 days</td>
</tr>
<tr>
<td>Release of Power Connection</td>
<td>Electricity</td>
<td>Loads up to 20 KW: 36 days</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Loads up to 70 KW: 66 days</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Loads above 250 KW: 90 days</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Load above 1 MW: 105 days</td>
</tr>
<tr>
<td>Sanction of Loans</td>
<td>HSIDC/HFC</td>
<td>Sanction of loan: 30 to 45 days</td>
</tr>
</tbody>
</table>
COST OF DOING BUSINESS
Cost of Doing Business in Haryana

<table>
<thead>
<tr>
<th>Cost Parameter</th>
<th>Cost Estimates</th>
</tr>
</thead>
<tbody>
<tr>
<td>Industrial land purchase cost*</td>
<td>US$ 470 to US$ 1190 per sq metre</td>
</tr>
<tr>
<td>Office space rent**</td>
<td>Gurgaon: US$ 1 to US$ 4 per sq ft per month</td>
</tr>
<tr>
<td>Residential rent***</td>
<td>US$ 287 to 478 for a 2,000 sq ft house, per month</td>
</tr>
<tr>
<td>5-star hotel room rent****</td>
<td>US$ 80.4 per room night</td>
</tr>
<tr>
<td>Commercial &amp; Industrial</td>
<td>9.5 cents/kWh</td>
</tr>
<tr>
<td>Electricity****</td>
<td></td>
</tr>
<tr>
<td>Water*****</td>
<td>6 cents per 1000 litres</td>
</tr>
</tbody>
</table>

*Source: Director of Industries  
**Source: Property dealers/ Real estate agents  
***Source: Leading hotels in the state  
****Source: Haryana Electricity Regulation Commission  
*****Source: Water Supply and Sanitation Department
Key Industries that have developed in the state are a result of the policy thrust of the government and several factor advantages.
Overview of Agro-based industry in Haryana

Overview

• One of the biggest employment generators in rural Haryana with strong potential in value addition and exports

• State is promoting Organic farming aggressively wherein financial assistance of US$ 12 per hectare is provided to farmers for production and use of vermi-compost

• Use of Greenhouse Production Technology being encouraged to promote Disease free nursery and production of off-season Fruits and Vegetables;
Overview of Agro-based industry in Haryana

Overview

• Huge potential in the state for raising its horticulture production and exports to countries like the USA, European Union and Japan

• Dairy farming has huge potential in rural areas and is being promoted as a self-employment venture

<table>
<thead>
<tr>
<th>Key Players</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yakult Danone</td>
</tr>
<tr>
<td>GlaxoSmithKline Consumer Healthcare</td>
</tr>
</tbody>
</table>
Key Players in the Agro-Industry

Yakult Danone India Pvt. Ltd

- A joint venture between Japan’s Yakult Honsha and Group Danone of France
- Setting up a manufacturing facility in Haryana to produce Fermented milk in the country and allotted 8 acres of land in the Food Park of HSIIDC

GlaxoSmithKline Consumer Healthcare Ltd.

- Indian group company of GlaxoSmithKline U.K., and one of the largest players in the health food Drinks Industry in the country
- The US$ 55 million factory at village Khera, Sonipat has a capacity to produce 261,000 tonnes per annum of its health foods brand Horlicks
Key Player in the Food Processing segment

**Perfetti Van Melle India**

- Started operations in India in 1992 with its Manesar factory
- Launched its first brand in the Indian market in 1994, the popular brand, Center Fresh
- Leads the Indian Sugar Confectionery market with more than 25% of the value share of the market
Key Player in the Food Processing segment

Nestle India

- Subsidiary of Nestle SA, Switzerland, headquartered in India in Gurgaon in Haryana
- 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
- Has a factory at Samalkha factory (Panipat), commissioned in 1993, to manufacture milk products
Overview of Textiles Industry in Haryana

Overview

• Abundant availability of raw material gives Haryana a competitive advantage in the Textile sector - Cotton production in 2006-07 was roughly 1.81 million bales and the state contributes 25% to the national production of Cotton Yarn
• There are 73 spinning mills and 2 composite mills in the state
• Production of textiles, including ready-made garments, in Haryana roughly US$ 1 billion annually and almost one-third of this is exported
• A cluster of high-fashion readymade garments units have come up in the well-developed industrial area of Udyog Vihar, Gurgaon

Key Players

<table>
<thead>
<tr>
<th>Key Players</th>
</tr>
</thead>
<tbody>
<tr>
<td>DCM Textiles</td>
</tr>
<tr>
<td>Orient Craft</td>
</tr>
<tr>
<td>Benetton India</td>
</tr>
</tbody>
</table>
Key Players in Textiles Industry

**DCM Textiles**
- Has a Spinning mill located in Hisar with an installed capacity of 39,204 Spindles
- Engaged in the manufacturing of 100% Grey cotton yarn and Melange yarn
- Products exported to countries like Korea, Sri Lanka, Bangladesh, Egypt, and Taiwan

**Orient Craft Limited**
- Located in Gurgaon with a 3,000 strong workforce
- Has established itself as a premium exporter of textiles from Haryana
- Plans to develop a SEZ spread over 600 acres of land in Gurgaon with a total investment of US$ 450 million
Key Players in Textiles Industry

Benetton India

- Wholly owned subsidiary of the Benetton Group, Italy
- United Colours of Benetton brand is amongst the market leaders in Branded apparel, with more than 106 stores across 45 cities across the Country
- Manufacturing unit in Gurgaon manufactures almost 50% of the garments required for Indian stores
Overview of Automotive and Auto Components Industry in Haryana

Overview

• Preferred destination for Auto majors and Auto component manufacturers and host to many large players

• Important Automobile Centres are Gurgaon and Faridabad

• As per the latest data available from CMIE, the auto sector has shown an impressive CAGR of nearly 19% over the last four years

• With an invested capital of US$ 1.54 billion, the net value addition from the industry is US$ 930 million

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<th>Key Players</th>
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<td>Maruti Suzuki</td>
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<td>Honda Motorcycle and Scooter India</td>
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<td>Sona Koyo Steering Systems</td>
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<td>Omax Auto</td>
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Key Players in Automotive and Auto Components Industry

Maruti Suzuki India

- Market share of more than 50% in the Indian passenger car market
- Gurgaon facility has 3 Integrated plants with production capacity of 630,000 cars per year
- 4th plant at Manesar was inaugurated in February 2007
- Has drawn up an investment plan of US$ 2 billion in India by 2010
Key Players in Automotive and Auto Components Industry

**Hero Honda**
- World’s single largest Motorcycle company
- Built 2 world-class manufacturing facilities at Dharuhera and Gurgaon with an annual production capacity of 3 million Bikes per year

**Honda Motorcycle & Scooter India (HMSI)**
- 100% subsidiary of Honda Motor Company, Japan, with factory at Manesar having installed capacity of 600,000 Scooters and 400,000 Motorcycles per annum
- Cumulative investment of the company in the state has reached US$ 124 million
- Has established its R&D facility at Gurgaon, one of three such facilities globally
Key Players in Automotive and Auto Components Industry

Escorts

• Leading Engineering conglomerates in high growth sectors of Agri-machinery, Construction and Material handling equipment, Railway equipment and Auto components

• Corporate headquarters and manufacturing facilities for Tractor assembly, Transmission and engines, Crankshaft and Hydraulics located in Faridabad
Key Players in Automotive and Auto Components Industry

**Yamaha Motors**

- A 100% subsidiary of Yamaha Motor Company Ltd, Japan
- Manufacturing plant located in Faridabad which supplies to the domestic as well as overseas market

**Sona Koyo Steering Systems**

- Largest manufacturer of steering gears in India with 50% market share
- Leading supplier of Hydraulic power steering systems, Manual rack and Pinion steering systems, collapsible, Tilt and rigid steering columns, Rear axle assemblies and Propeller shafts
- Has a Manufacturing facility in Gurgaon
Key Players in Automotive and Auto Components Industry

**Talbros Automotive Components**
- Manufacturer of Automotive and Industrial gaskets in India
- Haryana Manufacturing facilities located at Faridabad, Gurgaon, Bawal and Sohna

**Munjal Showa**
- Manufacturers shock absorbers and struts for leading Two-wheelers and Four-wheelers
- Manufacturing plant in Gurgaon
Key Players in Automotive and Auto Components Industry

Omax Auto

• Amongst the top domestic Auto Ancillary players in India

• Manufactures sheet metal, Tubular and machined components and Sprockets for two-wheelers and four-wheelers at its 2 plants in Dharuhera in Haryana
Overview of Petrochemical Industry in Haryana and Key Players

Overview

• Petrochemicals sector has an invested capital of US$ 17.2 million and net value addition of US$ 56 million

• Indian Oil Corporation’s Panipat refinery is one of the prestigious projects in the state and is referred to as India’s most modern refinery
Overview of Petrochemical Industry in Haryana and Key Players

**Indian Oil Corporation**

- Manufactures Petroleum products, Crude oil, Lubricants, Grease, Oil base, Additives and others

- Set up its 7th Refinery at Panipat with an installed capacity of 6 million metric tonne per annum (MMTPA) at a cost of US$ 830 million. Its capacity has been increased to 12 MMTPA and is in the process of being increased further to 15 MMTPA

- Announced the setting up of the US$ 67 million Mundra-Panipat Pipeline and Naphtha Cracker Complex at Panipat

- Naphtha cracker and downstream polymer and chemicals unit expected to go on stream during 2008-09
Overview of Real Estate & Construction Industry in Haryana

Overview

• Real estate and Construction Industry growing at a rapid pace in Haryana

• City of Gurgaon accounts for more than 70% of the new commercial space coming up in the National Capital Region

• Growth in real estate encompasses activities in the residential, commercial and hospitality space

• Most of the commercial places are High Rise Commercial Towers with power back-up, centralised security and maintenance, fire safety systems and plenty of space for parking

Key Players

- DLF Group
- Unitech Group
- Ansal Group
- Emaar MGF
Key Players in Real Estate & Construction Industry

**DLF Group**

- One of the largest real estate players in India and generally credited with the growth of the city of Gurgaon
- Responsible for the development of 22 Urban colonies, as well as an entire integrated 3,000-acre township - DLF Cyber City in Gurgaon
- The “Mall of India” by DLF in Gurgaon, spreads over an area of 3.6 million square feet and will be the Largest Mall in India.
Key Players in Real Estate & Construction Industry

Unitech Group

• A large real estate player in Gurgaon which has executed projects providing world-class service facilities like Nirvana Country, Unitech World, Unitech Trade Centre, Unitech Business Park Millennium Plaza, Signature Towers and Global Business Park

Vipul Group

• Prominent player in the residential and commercial real estate space, with prestigious projects in Gurgaon like the Global Business Park and Millennium Plaza
Key Players in Real Estate & Construction Industry

Ansal Group

• Has expanded its activities from real estate development to high value construction areas
• Has presence in Gurgaon through several projects in both the Residential and Commercial space

Emaar MGF

• A joint venture between Emaar Properties PJSC Dubai, the world’s leading real estate company, and MGF Development Limited, India’s leading real estate developer;
• One of its residential projects in Gurgaon, Palm Springs, comprises of approximately 300 High-end apartments and 100 Luxury villas
Overview of IT/ITeS and Electronics Industries

Overview

- Gurgaon has emerged as a preferred destination for the IT Industry in North India
- Total Software exports from Haryana about US$ 2.23 billion in 2005-06 (about 10% of all-India software exports)
- Software exports from the state have shown a CAGR of 33% over the last four years
- Electronics Industry in Haryana has also shown good performance - with a size of US$ 5.2 billion in 2006, it has grown at a CAGR of 19.2% over the last four years
- Industry manufactures products covering almost the whole spectrum, namely Components, Consumer electronics, Communications, Computers, Telecom handsets and Control instrumentation
Key players in IT/ITeS Industry

**IBM Daksh**

- Corporate office in Gurgaon, manages business processes for clients from across the world;
- 14 Service delivery centres in India, workforce of more than 20,000 making it the 2nd largest Business Process Outsourcing vendor in India, in terms of headcount
Key players in IT/ITeS Industry

**Convergys India Services**

- Has 3 Operating centres in Gurgaon at Atria, Orchid Square and Unitech, with the centre at DLF Atria as the largest in India
- Ranked as the world’s largest outsourcing firm for contact centre services
- Offers diverse portfolio of Customer care solutions, including customer care services, simple-to-complex technical support solutions, marketing sales programs and back-office BPO
Key players in IT/ITeS Industry

**Tata Consultancy Services**
- Leading IT services’ company with global revenues of US$ 4.3 billion (2006-07)
- Commenced operations at Gurgaon in 1995 where it has 5 office locations

**WNS**
- One of the pioneers in offshore Business Process Outsourcing
- Serves clients in domains like Travel and Transportation, Insurance, Healthcare, Shared services and Knowledge services sectors
- 140,000 square feet facility in Gurgaon has a capacity of 3,500 Associates
Key players in IT/ITeS Industry

Genpact

- Amongst the largest business services and technology solutions company in India, operating in the BPO and KPO domain
- Functional presence in Finance and Accounting, Insurance, Analytics, Sales and marketing, Financial services collection, Supply chain and procurement, IT services, Enterprise application services, Programme management and Customer services
- Headquartered in Gurgaon, operating centre at Gurgaon has more than 7,000 employees
Key players in IT/ITeS Industry

**Wipro Infotech**

- One of the largest IT firms in the country;
- Impressive clientele includes many of the Fortune 1000 and Global 500 companies;
- Call centre at Gurgaon has a capacity of 2,000 seats

**Evalueserve (EVS)**

- Leading provider of KPO services
- Provides custom market research, Business research, analytics, Investment research, Intellectual property research and Marketing and Sales support services from its global research centres
- India has 3 operation centres, all located in Gurgaon
Overview of Biotech Industry

Overview

• Yes Bank is mandated along with Scott Wilson Kirkpatrick India to develop the Biotech City along the KMP expressway

• Establishment of R&D facilities and research centres and laboratories in collaboration with the private sector being encouraged

Key Players

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<td>Eli Lilly</td>
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<td>Ranbaxy Laboratories</td>
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Key Players in Biotech Industry

Proagro Seeds Company Private Limited

- Company of the Bayer CropScience Group
- Leading seed companies in India
- Engaged in breeding, development, production and marketing of high quality hybrid field seeds
- Has a Biotech laboratory in Gurgaon where Genetic markers, DNA finger printers and other tested techniques are used to support to the company’s plant breeding efforts
Key Players in Biotech Industry

Eli Lilly and Company (India) Pvt. Ltd

• A subsidiary of the US pharmaceutical major, Eli Lilly and Company

• Focuses primarily on therapeutic areas like Neuroscience, Endocrine disorder, Cancer, Cardiovascular diseases, Bone and inflammation and Gene regulation

• In India, Eli Lilly has based its operations in Gurgaon and conducts Clinical trials of biotech drugs from its global portfolio in India
Key Players in Biotech Industry

Ranbaxy Laboratories

• Manufactures and markets Branded and generic pharmaceuticals and Active Pharmaceutical Ingredients

• Based in Gurgaon and employ so ever 11,000 people worldwide

• R&D centres in Gurgaon focus on Novel Drug Delivery Systems, New Drug Discovery and the development functions

• Ranked among the top 10 generic companies worldwide
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