



*PROGRESSIVE*  
**PUNJAB**

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October 23, 2013 Mumbai

# The Spirit of Punjab

Rich history, diverse culture and deep-rooted traditions

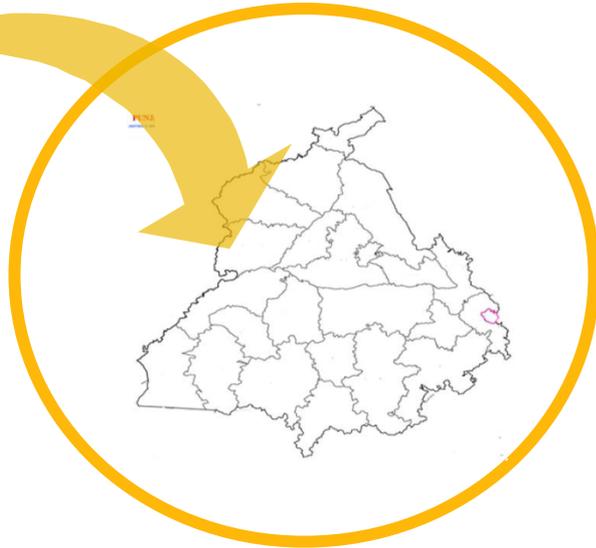
Known as the land of lush green fields, free flowing rivers and festivities

Warm hearted people, well-known for their hospitality

Rich culture reflected in the world famous Punjabi cuisine



# Punjab: The land of five rivers



- Located in the north-west of India
- “Food Bowl of India”
  - Produces 20% of India’s wheat
  - Produces 11% of India’s rice



## Key statistics

### Key cities

Chandigarh (Capital),  
Mohali, Ludhiana,  
Amritsar, Jalandhar,  
Patiala, Bathinda

### Area (sq km)

50,362

### Population (million)

27.7

### Among the leading states in

Wheat, Rice, Bicycle  
and Bicycle parts,  
Cotton Textiles, Citrus  
Fruits



# Punjab: The leading state...



3rd most attractive destination for new investments in India in 2012-13 as per Reserve Bank of India



Ludhiana adjudged as 'best place for doing business in India' as per World Bank Study, 2009

- **Leading food producer in India**
  - **84% land area under cultivation**
  - **Road density of 133 km per 100 sq km**
  - **Amongst the top states in terms of per capita consumption of electricity**
- 
- **Leader in manufacturing of bicycles, bicycle parts and hand tools**
  - **Second-largest producer of cotton and blended yarn in India**



# Why Punjab?

**Advantage  
Punjab**

**Policy  
incentives**

**Opportunities  
for investment**



## **Advantage Punjab**

- **Location advantage**
- **Best in class infrastructure**
- **Well connected affluent population**
- **Skilled workforce**
- **Conducive enabling environment**



# Advantage Punjab - Location

Located in the north-west of India, Punjab is well connected domestically through road, air and rail and to the Far East, Middle East, Europe and US through international airports.



Opening of the Wagah border has opened avenues for export to Pakistan and other Central Asian countries

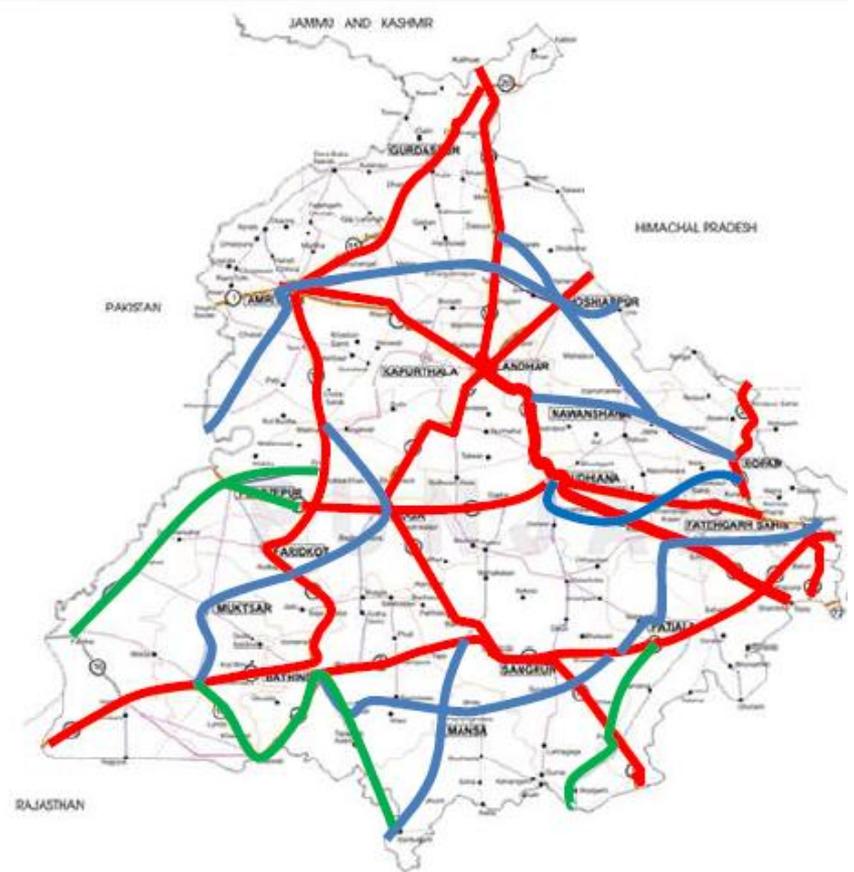


Gateway to landlocked states of India and within easy reach to large markets



# Advantage Punjab - Best in class Infrastructure

- One of the best rail and road transport networks
- High quality road density: 133 km per 100 sq km
- Proposed Amritsar – Delhi - Kolkata industrial corridor
- Power surplus by 2014
- Development of clusters and parks for industries
- 13 container freight stations/ ICDs for export - import logistics



Finest Road Network



# Advantage Punjab - Best in class Infrastructure

Excellent connectivity to all regions of Punjab through air and road network



# Advantage Punjab - Best in class Infrastructure

## Futuristic Town Planning

Mohali

Ludhiana

Jalandhar

Amritsar

Patiala

Bathinda

By leading National/ International Developers

First state to introduce  
Master Planning of Towns



# Advantage Punjab - Well connected affluent population

- 21% higher per capita income than the Indian average
- 4<sup>th</sup> highest tele-density of 103% in India
- 2<sup>nd</sup> highest rural tele-density in India
- Large diaspora connect: 10 million Punjabis around the world having strong connect with the state



# Advantage Punjab - Enabling Environment

- 13 Universities
- 360 Under-graduate colleges and 75 Post-graduate colleges
- Excellent record of Industrial Relations
- Proximity to large markets
- High propensity to consume



# Why Punjab?

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# Package of Incentives

Punjab provides attractive incentives to new units in the state

**Value Added Tax (VAT) and Central Sales Tax (CST) Incentive**

**Retention of VAT and CST upto 90%**

**Electricity Duty Incentive**

**Up to 100% exemption**

**Stamp Duty Incentive**

**100% exemption on purchase/  
lease of land**

**Property Tax Incentive**

**100% exemption for 10 years**

**For more information, please visit: [www.pbindustries.gov.in](http://www.pbindustries.gov.in)**



# Why Punjab?

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# Well developed hubs for industries

- **Textile Hubs**

- Ludhiana, Bathinda, Barnala

- **Food Hubs**

- Amritsar, Ferozepur

- **IT Hubs**

- Mohali, Amritsar

- **Petro Park**

- Bathinda

- **Automobiles Hub**

- Patiala

- **Hosiery, garments, knitting and weaving**

- Ludhiana

- **Hand Tools, Sports and Leather Goods**

- Jalandhar



# Punjab - Opportunity for Investment

## Focus Sectors



**Agro and Food Processing**



**Infrastructure**



**IT, Hardware and Electronics**



**Textiles**



**Light Engineering**



**Bio-sciences,  
Healthcare and Pharma**





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**Agro and Food  
Processing**

# Punjab – The Food Bowl of India

- During 2011-12, Punjab produced 24 million tonnes of food grains
- With only 1.5 % of country's area, Punjab produces:

Product	% share in India	Amount Produced (2011-12)
Wheat	20%	About 14 million MT
Rice	11%	About 10 million MT
Cotton	10%	Over 1.6 million bales
Mushrooms	45%	Over 70,000 MT
Honey	26%	Over 18000 MT
Milk	9%	Over 10 million MT
Kinnow	75%	About 1 million MT



**One of the largest flower seed and potato seed growers**



# Opportunities in Agro and Food Processing



Cash & Carry

- **Large crop production:**
  - Fertilizers, pesticides, manures
  - Farm machinery and equipment
  - Micro irrigation techniques
- **Fruits and vegetables:**
  - Processing such as fruit juices, pulp, jams, etc.
- **Dairy and livestock**
- **Logistics:**
  - Cold storage and warehouses
  - Transportation companies
  - Retailers and wholesalers



# Success stories in Agro and Food Processing



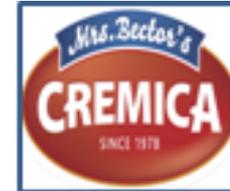
Dairy products



Soft drink concentrates  
& snack foods



Nutritional supplements



Bakery products & liquid  
condiments



Milk & milk products



Basmati rice



Basmati rice



Vanaspati ghee  
& refined oil



Button mushrooms



Frozen chicken  
& meat products



Rice bran oil



Frozen vegetables



Malt & brewery





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**Infrastructure**

# Opportunities in Renewable Energy

Punjab has a mission to harness 2,400 MW energy from renewable sources by 2022

## Grid connected Solar power plants



**100 MW** capacity grid connected power projects to be allocated in 2014-15

## Bio mass projects



**200 MW** capacity biomass power projects to be allocated in 2013-14

## Mini and micro hydel projects



**85 MW** capacity mini and micro hydel potential on canal systems

## Rooftop Solar Photovoltaic projects



**More than 100,000 square meter area** available for rooftop solar power projects



# Mohali – Best planned city in India

## Social infrastructure

- Adjoining Chandigarh, the capital of Punjab
- State-of-the-art hospitals such as Max and Fortis
- Cluster of reputed educational institutes
- World class sports stadiums
- Excellent connectivity

## Upcoming projects

- Mohali Downtown – 324,000 sqm
- IT City, Mohali – 7 million sqm
- Medicity, New Chandigarh – 1 million sqm
- Education City, New Chandigarh – 6 million sqm



# Ludhiana – The city of tomorrow

## Best city to do business in India\*

- One of the most prosperous regions in the country
- High disposable income, significant consumer spending power
- Established industrial base

### Downtown Ludhiana

- 140,000 sqm of well connected prime land for mixed use development.
- Excellent connectivity via airport, rail and national highway
- A central growth hub with high demand for retail/office/high-end residential space
- First major development of this nature in the region



\*World Bank 2009



# Other mega opportunities

## Bus Rapid Transport System

- Amritsar and Ludhiana being covered in the 70 km-long first phase

## Roads

- Eleven projects with an investment of INR 2,900 crore (**USD 500 mn**) and a total length of 567 km to be developed through BOT model

- All major towns of Punjab are being connected with four and six lane expressways

## Logistics and Warehousing

- Potential to develop a dry port with logistics park in
  - Amritsar (100,000 TEUs per annum)
  - Jalandhar (60,000 TEUs per annum)





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**Information Technology  
and Electronics  
Hardware**

# Available infrastructure

## IT City, Mohali

- Located in vicinity of upcoming International Airport
- 7 million sqm available for development
- Potential for industrial, institutional, commercial and residential development
  
- 160,000 sq. m of land available for Electronics and Hardware
- 200,000 sq. m of land earmarked for Taiwanese investors in Electronics and Hardware sector



# Available infrastructure

## Plug and Play infrastructure at Quark City, Mohali



- Plug- and-play space of 100,000 sqm at Special Economic Zone (SEZ)
- High quality and cost efficient telecommunication connectivity

## State-of-the-Art Incubation Center, Mohali



- 13,000 sqm built up space
- Ready infrastructure and facilities



# Available infrastructure

## Electronics Township (ELTOP), Mohali

- Developed in an area of 1.2 million sq. m
- Facilities available:
  - Center for Electronics Design and Technology
  - Established Electronics Research and Development Center



Dell Campus in Electronics Township



## Availability of skilled human capital

- 13 universities
- 360 under-graduate colleges
- 75 post-graduate colleges
- Prominent institutes:
  - Punjab University
  - Indian Institute of Technology
  - Indian School of Business
  - Thapar University
  - PEC University of Technology
  - Punjab Technical University

Institutes	Number	Capacity
Engineering colleges	101	43,784
Polytechnics	181	62,700
Industrial Training Institutes (ITIs)	378	62,000 +



# IT and Electronics Industry in Punjab

## Success Stories





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**Manufacturing –  
Textiles and  
Light Engineering**

# Textiles and clothing industry in Punjab

- Second largest cotton and blended yarn producer in the country.
  - Punjab produces 14% of India's cotton yarn
- Leading exporter of yarn, hosiery and ready-made garments.
- Offers highly skilled professionals
- Leading design institutes like NIIFT, INIFD and Sportking Institute.

## Production in Punjab (2011-2012)

Yarn	655 mn kg
Cloth	150 mn sq. m
Exports from Punjab (2011-2012)	
Yarn & Textiles	USD 1,304 million
Hosiery & Readymade Garments	USD 628 million



# **Key Segments: Potential for Growth**

## **Opportunities in Textiles and Clothing Sector**

- **Access to global markets through superior road, rail and air network.**
- **Significant potential for export of high-end readymade garments**
- **Immense potential in yarn exports to Bangladesh, Pakistan and China.**
- **Presence of a large market with a high propensity to consume**
- **Potential for increase in spindlage in the region**



# Success stories



**Nahar** Group of Companies



# Light Engineering

**Punjab leads the country in machine tools, hand tools, bicycles & bicycle-components.**

- **Accounts for around 15% of bicycle production and 80% of bicycle parts production in India**

## **Exports in 2012-13**

- Engineering Goods: USD 259 mn
- Machine Tools/ Hand Tools: USD 272 mn
- Bicycles and Parts: USD 200 mn
- Auto Parts: USD 73 mn



# Light Engineering

## Opportunities in Light Engineering sector



- **Technology transfer with existing industry**
- **Bicycle and auto components**
  - Increasing domestic and export markets
- **Agriculture allied tools and machinery**
  - Significant potential for further mechanization in labour intensive operations
- **Export potential:**
  - Increased potential in trade with Pakistan through Punjab to provide access to new large markets



# Success Stories



**JOHN DEERE**



*Accurates (India)*  
A Name Of Trust

**SINGER**





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**Bio – sciences, Health  
and Pharmaceuticals**

# Bio-sciences, Healthcare and Pharmaceuticals

## Investment Regions

- Mohali- Established eco-system with anchor institutions
  - Presence of 12 research institutes, quality educational institutions and pharma industry
- Amritsar- Established medical colleges providing skilled professionals

## Opportunities

- Medical Tourism: Large diaspora population
- Demand for Quality
- Better Awareness
- Advanced Treatment
- Higher per capita income



# National level institutions

## Research and educational institutes



**National Agri-Food Biotechnology  
Institute , Mohali**



**Post Graduate Institute for  
Medical Education & Research**



**Institute of Nano Science and  
Technology , Mohali**



**National Institute of  
Pharmaceutical Education  
and Research, Mohali**



**Indian Institute of Science  
Education & Research,  
Mohali**



# Success stories in healthcare



# **Progressive Punjab – Investor Summit**

**You are cordially invited to the  
Progressive Punjab Summit**

on 9<sup>th</sup> & 10<sup>th</sup>  
December, 2013  
at  
Mohali, India



**Thank You**



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