

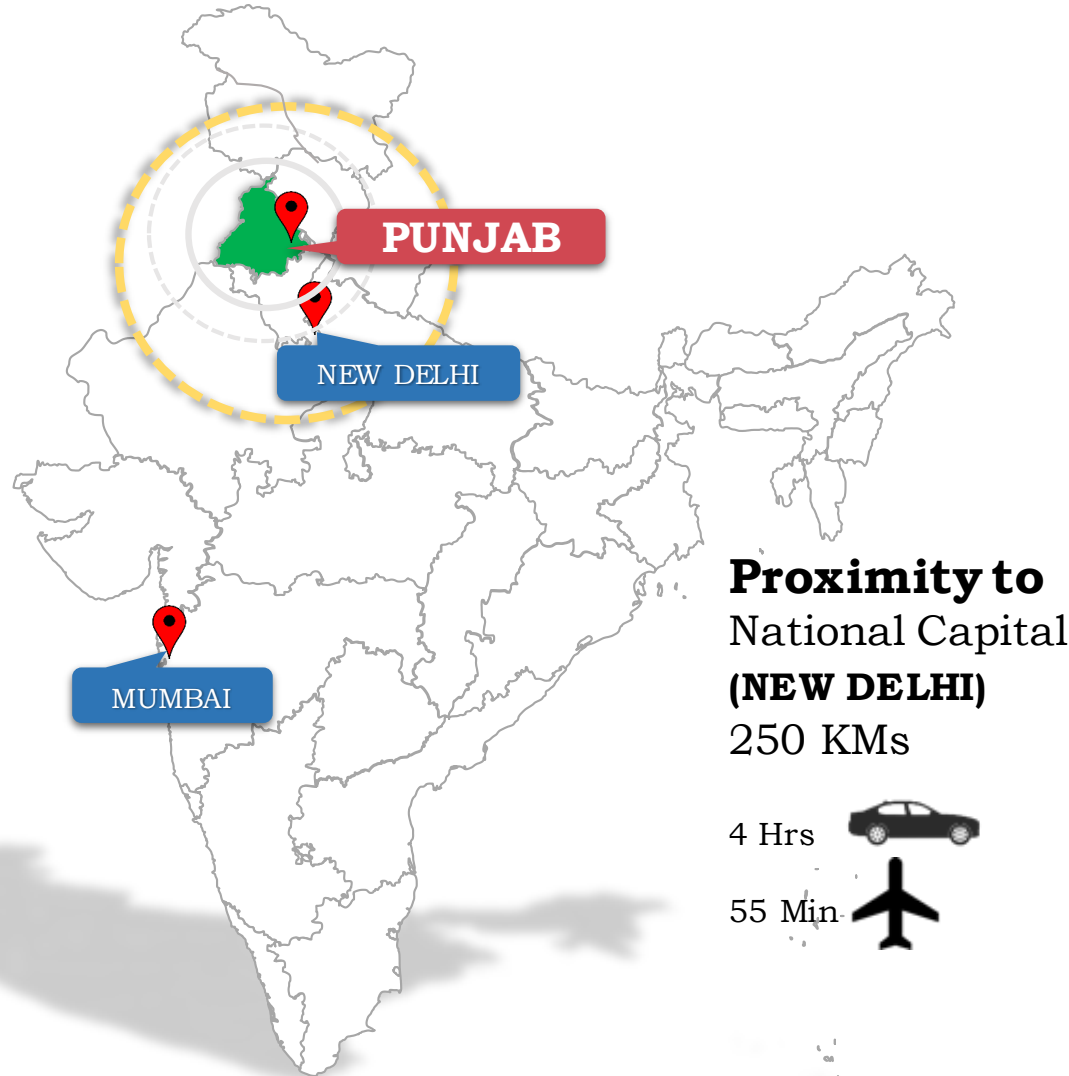
WELCOME TO PUNJAB INDIA

11th Nov 2020

INDIA KOREA BUSINESS FORUM

THINK PROGRESS - THINK PUNJAB

STRATEGICALLY LOCATED



VIBRANT ECONOMY

With **1.5%** of India's land area, contributes **3%** to India's GDP

FOOD BOWL OF INDIA

25% Rice & 35% Wheat share in Central Grain Pool

TRACTORS

India's largest Tractor manufacturing State. Punjab accounts for 29% of India's total Tractor production.

BICYCLE

Leading State in Bicycle (75%) & Bicycle components (92%) Manufacturing

TEXTILE

Biggest Hosiery / Woolen (65%) Manufacturing State

many more...

PUNJAB - A GLOBAL POWERHOUSE

LAUNCHPAD FOR MNCs IN INDIA

1961 Nestlé

1985 **ISUZU**

1989 PEPSICO

2009 Walmart

2019 **IFFCO**
FROZEN FOODS

@ MOGA
(HQ: Switzerland)

@ RUPNAGAR
(HQ: Japan)

@ SANGRUR
(HQ: United States)

@ AMRITSAR
(HQ: United States)

@ LUDHIANA
(HQ: SPAIN)

PREFERRED INVESTMENT DESTINATION FOR MNCs

AMERICAS

EUROPE

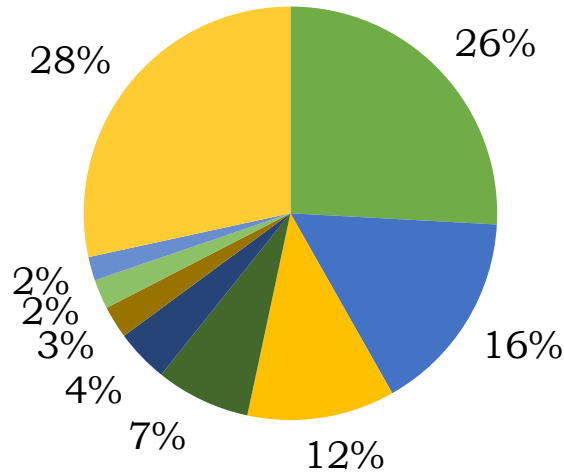
ASIA & MIDDLE EAST

PUNJAB – SOUTH KOREA RELATIONS

TRADE RELATIONS

On average **Punjab exports** USD 45 mn worth of goods to **South Korea**

- Cotton Yarn
- Woollen Yarn, Fabrics, Madeups
- Bulk Drugs, Drug Intermediates
- Residual Chemicals & Allied products
- Manmade Yarn, Fabrics, Madeups
- Rubber Products
- Plastic sheets, films
- Hand tools, Cutting Tools
- Others



Major exports from Punjab to South Korea

ACADEMIC PARTNERSHIPS

PUNJAB - CONNECTIVITY

AIR CONNECTIVITY



- Tashkent (2.5 Hrs)
- Dubai (3.5 Hrs)
- Birmingham (9 Hrs)
- Doha (4 Hrs)
- Kuala Lumpur (6 Hrs)

Singapore (6 Hrs)

Amritsar
International
Airport

Mohali
International
Airport

4 Domestic Airports

- Jalandhar, Ludhiana, Bathinda
- Pathankot

Coming Soon

INTERNATIONAL AIRPORT
@ Ludhiana

COMPETITIVE FACTORS OF PRODUCTION



ELECTRICITY

Affordable Quality Power

- **80 KRW/ unit** (variable tariff)
- **Electricity Surplus** State
- Low Transmission Losses



WORKFORCE

Peaceful Labour

- **No major strike** in last 3 decades
- **No domicile** restriction
- **24X7 shifts** across gender
- Competitive wages @ ~150,000 KRW/ month



LOGISTICS

Ranked 2nd in Ease of Logistics

- **1st** in Safety/ Security of Cargo Movement
- **5** Inland Container Depots & **3** multi-modal logistics park
- **2nd Highest rail density**
- Connected to **dedicated freight corridors**



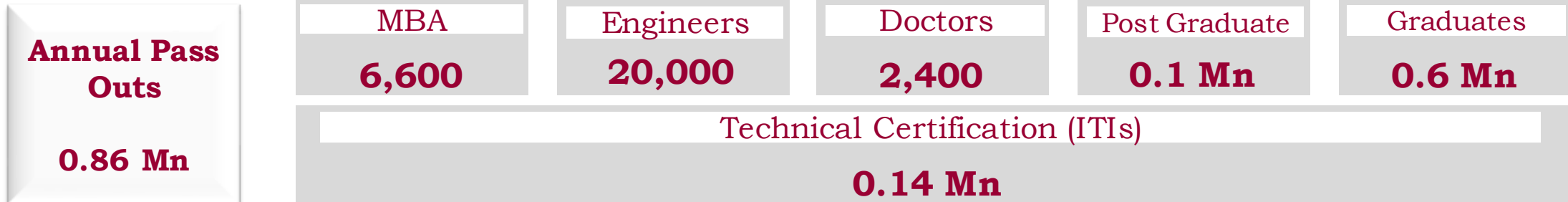
DIGITAL INFRASTRUCTURE

Ranked 2nd in Tele-Density (%)

- **1st in India** (No. of Internet subscriber/ 100 population)
- In **top 5 states** in optical fiber net connectivity
- **4G connectivity** across the State

SKILLED HUMAN CAPITAL

TALENT POOL



Premium Institutes

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

Indian School of **Business**, Mohali

Indian Institute of **Technology**, Ropar

Indian Institute of **Management**, Amritsar

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

Northern India Institute of **Fashion** Technology, Mohali

Punjab **Agriculture** University, Ludhiana

All India Institute of **Medical Sciences**, Bathinda

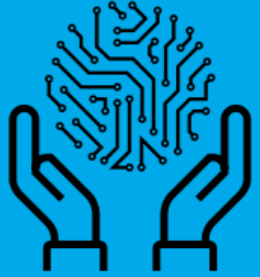
National **Agri-Food** Biotechnology Institute, Mohali

National Institute for **Pharma** Education & Research, Mohali

Borlaug Institute for South Asia, Ludhiana

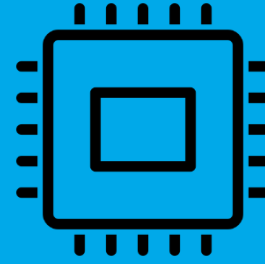
Many More....

RESEARCH & DEVELOPMENT ECOSYSTEM



**ARTIFICIAL
INTELLIGENCE &
MACHINE LEARNING**

**IIT ROPAR
NCCU TAIWAN**



**MICROELECTRONICS
FABRICATION**

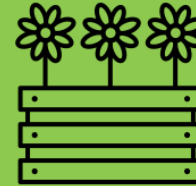
SEMI CONDUCTOR LAB

MOHALI



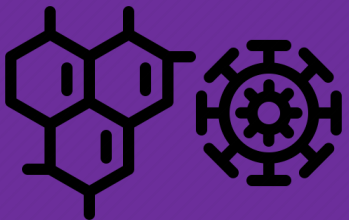
**VEGETABLE & CITRUS
CENTRE OF EXCELLENCE
INDO-ISRAEL**

JALANDHAR & HOSHIARPUR



**POTATO & FLORICULTURE
CENTRE OF EXCELLENCE
INDO-DUTCH**

JALANDHAR & LUDHIANA



**MICROBIAL
BIOTECHNOLOGY**

IMTech, CHD



**GOOGLE
CENTRE OF EXCELLENCE**

LPU, JALANDHAR

Many More....

UNMATCHED FISCAL INCENTIVES

- ▶ **GST reimbursement** for 15 years upto **200% of FCI** on PAN INDIA sales
- ▶ **Employment generation subsidy** of up to 765,100 KRW/ employee/ year for 5 years
- ▶ 100% exemption from **external development charges** & duties levied on land purchase
- ▶ 100% exemption from **electricity duty** for 15 years

Minimum Investment (KRW)	OR	Minimum Direct Employment	
7.5 Bn		500	} Apparel & Made ups, Electronics, Food Processing, IT/ITeS, Footwear & Accessories
30 Bn		1000	

FOR ANCHOR UNIT

PUNJAB – EASE OF DOING BUSINESS



ONE STOP OFFICE

ADVANCED SINGLE WINDOW SYSTEM

ONE OF ITS KIND IN INDIA

**INVESTMENT
PROMOTION**

FISCAL INCENTIVES

**REGULATORY
CLEARANCES**

**INVESTMENT
FACILITATION**



**UNIFIED
REGULATOR**
(23 Departments)



**INVESTMENT
PROMOTION AGENCY**



**DEDICATED
RELATIONSHIP OFFICERS**



DIGITAL APPROVALS

QUALITY OF LIFE

2nd in
HEALTH INDEX
by Government of India

- Niti Ayog 2018



3rd highest
number of
FOREIGN STUDENTS

- Survey AISHE 2018-19



In top 5 States
in **DENSITY** of
Colleges & Universities
in India

- ESAG 2018 MHRD GoI



India Happiness Report 2020,
PUNJAB **Rank 2** in India.

- Professor Rajesh K Pillania,
MDI Gurugram; Period
March-July 2020



3rd in
Governance & Political
STABILITY

- NCAER in 2018



Amongst the Lowest Rate
of **COGNIZABLE
CRIME** in India for
leading industrial States

- NCRB 2018



AGRI & FOOD PROCESSING

STRENGTHS

21% share of Food Processing in Manufacturing GDP of the State

Raw Material Hub

- a. 2nd in Wheat & Rice
- b. 2nd in Mandarin Orange
- c. 3rd in Honey
- d. Highest Per Capita Milk Availability

Export of USD 1.3 Bn Food Products

- a. Trade Partners - UAE, US, Vietnam, Middle-East, UK
- b. Exports - Basmati Rice, Cereal, Honey, Meat

Sectoral Infrastructure

- a. 3 Mega Food Parks
- b. 162 Warehouses
- c. 600+ Cold stores
- d. 3110 Purchase Centers

Research Centers

- a. Centers of Excellence with Israel & Netherlands
- b. PAU, GADVASU & NABI

MAJOR BRANDS



Nestle



OPPORTUNITIES

- Dairy Products
- Beverages/ Alcoholic Beverages
- Infant Food

- Meat Products
- Organic Products
- Animal Feed Products

- Health Supplements
- Edible Oils
- Ready to Eat Packaged Food

- Roasted Coffee Substitutes
- Cold Storage Setup
- Mega Food Park with P&P Facilities

ENGINEERING

STRENGTHS

Accounts for 25% secondary steel market

- 400 MSMEs with 50K employees (hand tools supply chain)

Raw Material Availability

- No.1 in machine & hand tools, sewing machine, bicycle & bicycle parts
- 2nd largest forging and machining unit
- > 200 steel rolling mills, 12 forging presses & 90 scrap cutting units
- Top state in Tractor & Agri implement manufacturing

Export Share in India

- Bicycle - 80%
- Machine & hand tools - 26% (Top Trading Partners: USA, UK, Germany, Brazil, UAE and Russia)
- 2nd largest Tractor exporter - 22%

Skilling And R&D

- IIT, NIT, PEC, Thapar, Central Tool Room
- State Institute of Automotive & Driving Skills, R&D Centre for bicycle & sewing machine, CoE in Farm Machinery

MAJOR BRANDS



OPPORTUNITIES

- Agri & Farm Machinery
- E-Bikes, High-end Bicycles, & Auto Components
- Robotic Arms

- Industrial Machinery
- Rail Coaches Parts
- Precision Instruments
- Hand Tools
- Machinery

POTENTIAL LOCATIONS

- IMC Rajpura (1100 acres)
- Hi-Tech Valley (280 acres)
- Light Engineering Cluster, Nabha (83 acres)

STRENGTHS

R&D Ecosystem

- Semi-Conductor Lab (SCL) is India's only Fab unit engaged in the design & development of VLSIs, ASICs, FPGAs etc.
- Developed LDOs for Chandrayaan-2 and supplied ASICs for use at CERN Geneva.
- Recent MoU with STPI & SCL for a Centre of Excellence in Microelectronics/ASIC Design

Manufacturing Units

- Godrej: Consumer Electronics
- CDIL- Power Electronics and Semi Conductors components
- Gilard , Hella: Automotive Electronics etc.
- PUNCOM: Voice /data, multiplexers, broadband equipment , Power Line Carrier equipment etc.

MAJOR BRANDS



OPPORTUNITIES

- Mobile Manufacturing
- Consumer Durables
- Engineering Design
- 3D Printing
- Auto Electronics
- Industrial Electronics
- Semi- Conductor Wafer Fab

POTENTIAL LOCATIONS

- IT City, Mohali (1700 acres)
- ESDM Park (200 acres)

PHARMA & MEDICAL DEVICES

STRENGTHS

Pharma Sector

- Bulk drugs cluster (Mohali)
- Proximity to Northern India's major pharma hub
- 5% growth in State's Index of Industrial Production from FY 2016 to FY 2019

- Market size is USD 611 mn
- Industry employs 13,000+ people
- USD 121 mn worth exports from State in 2019-2020

Medical Device

- During pandemic, 11 ventilator units were started
- Allengers: Digital radiography & Subtraction Angiography, High-frequency X-ray machine etc.
- Tynor Orthotics: Orthopedic aids

Skilling and R&D Institutes

- IIT, IISER, Indian Institute of Nano Science & Technology, National Institute of Pharmaceutical Education & Research, Institute of Microbial Technology

MAJOR BRANDS



OPPORTUNITIES

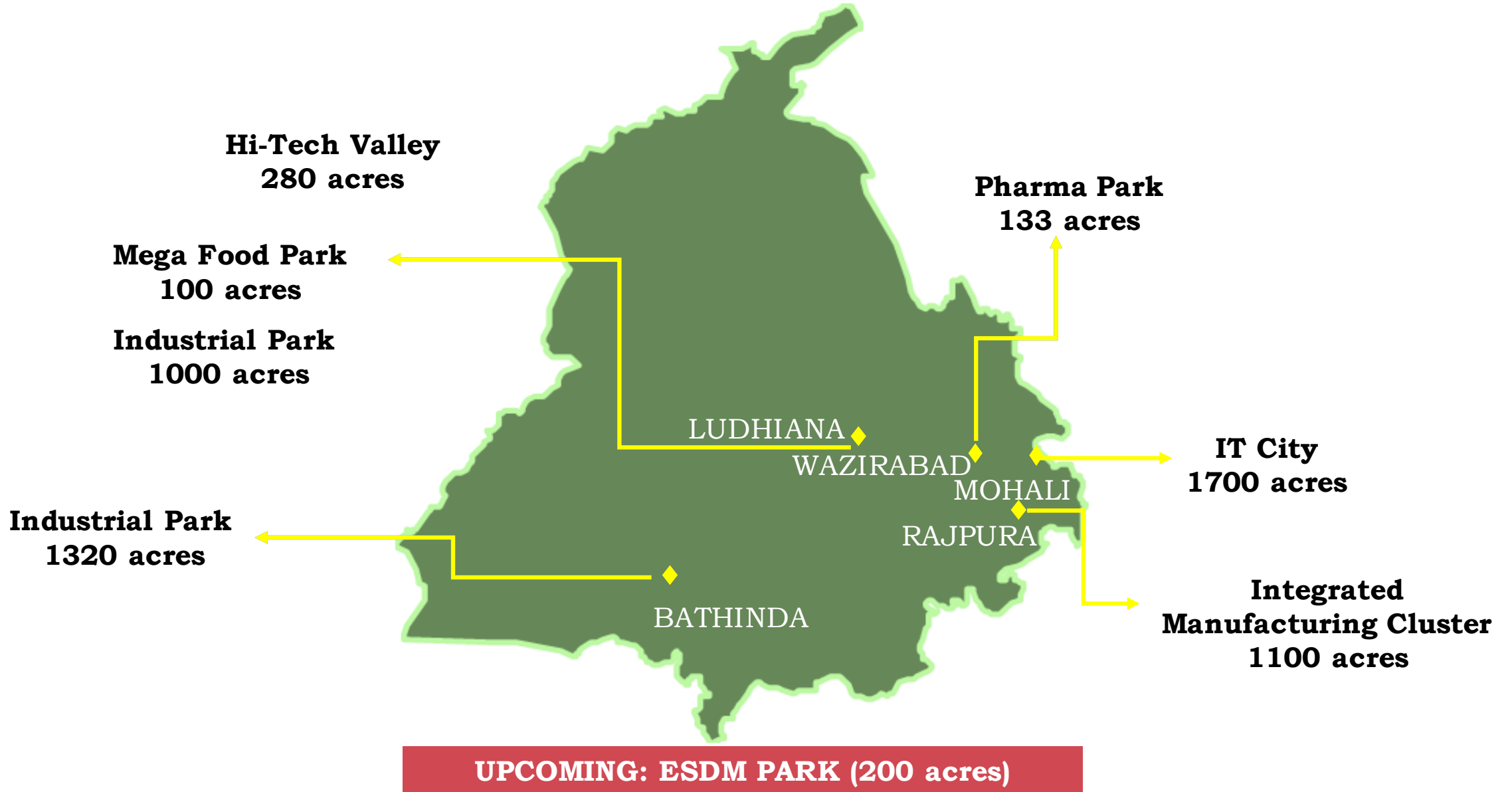
- Bulk Drugs/ APIs
- KSMs/ Intermediates
- Lifestyle Formulations
- Hi-Tech Medical Devices

- Bulk Drug Park, Bathinda* (1320 acres)
- Pharma Park, Fatehgarh Sahib (133 acres)
- Existing Pharma Cluster, Mohali

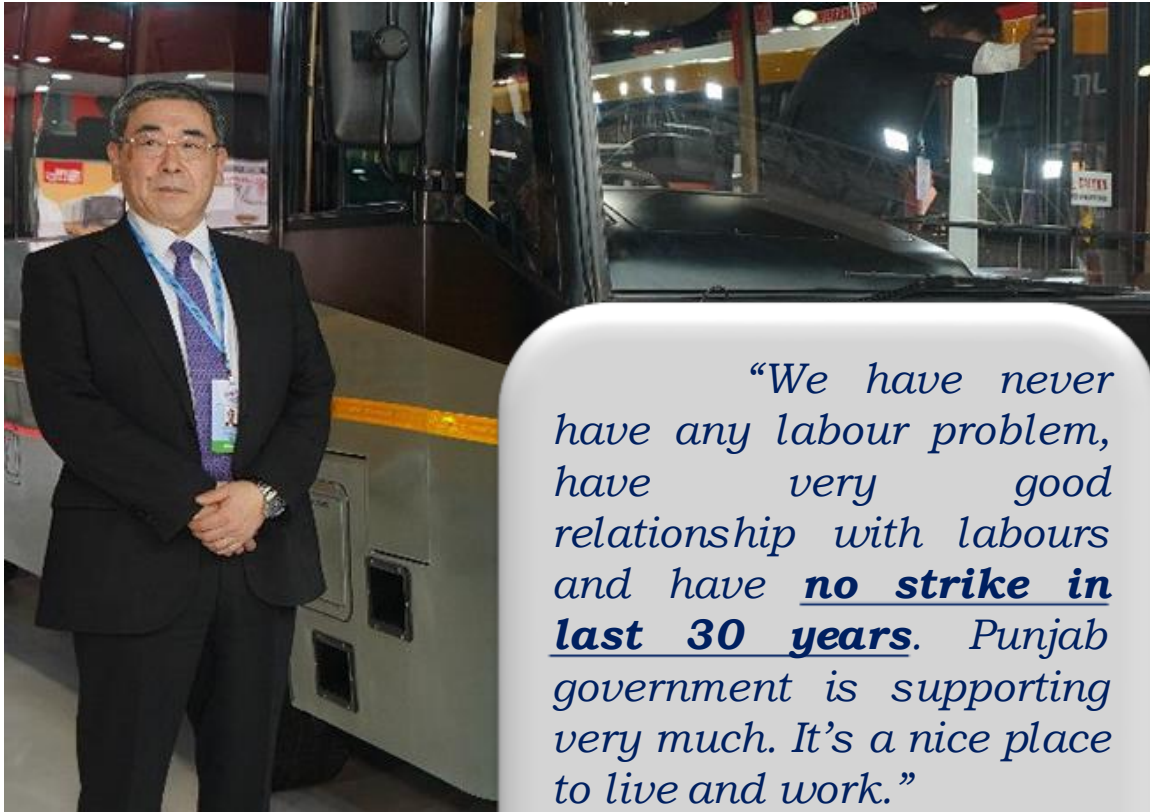
POTENTIAL LOCATIONS

- Medical Device Park, Rajpura (350 acres)
- Biotech Park, Mohali (80 acres)

INDUSTRIAL PARKS



INVESTOR TESTIMONIES

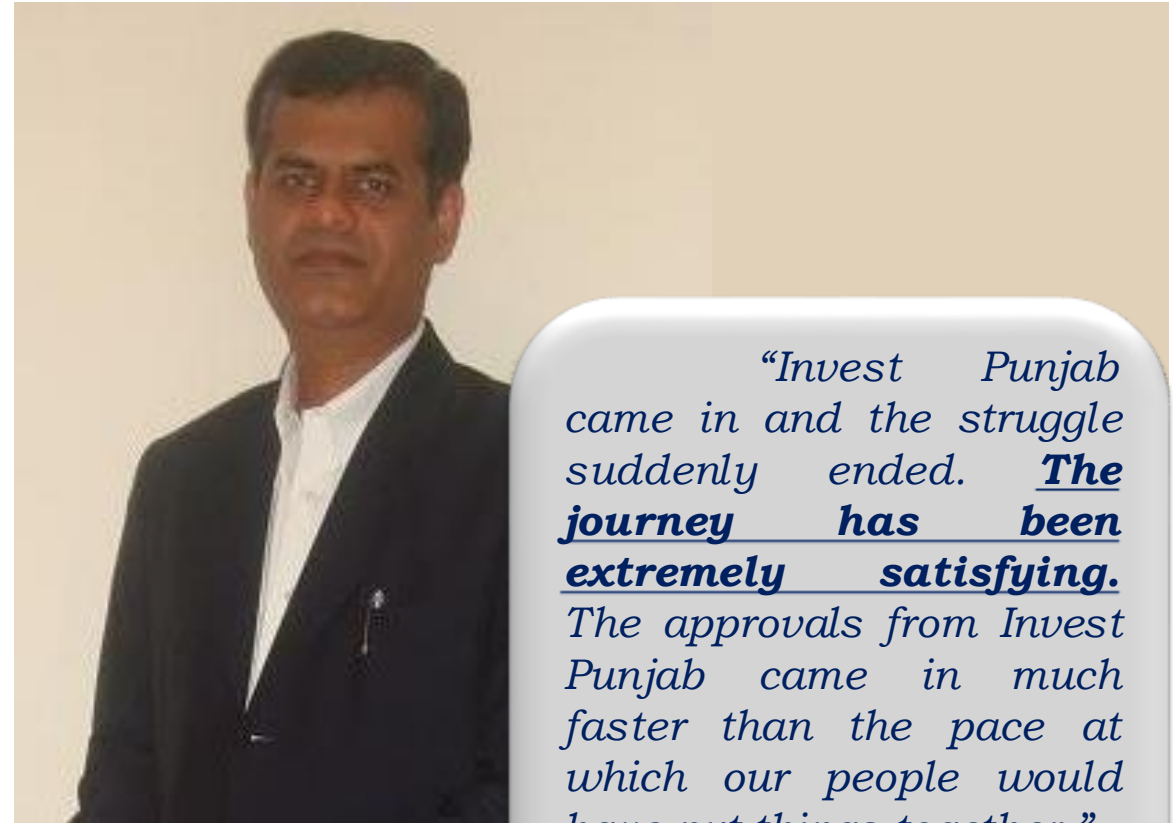


*“We have never have any labour problem, have very good relationship with labours and have **no strike in last 30 years**. Punjab government is supporting very much. It’s a nice place to live and work.”*

**SML
ISUZU**

**HEAVY VEHICLES
ROPAR**

Yugo Hashimoto
MD & CEO, SML ISUZU Ltd.



*“Invest Punjab came in and the struggle suddenly ended. **The journey has been extremely satisfying**. The approvals from Invest Punjab came in much faster than the pace at which our people would have put things together.”*

Godrej Tyson

**FROZEN FOODS
LUDHIANA**

Prashant Vatkar
CEO, Godrej Tyson Foods Ltd.

WELCOME



PUNJAB



THE CLOSER YOU LOOK, BETTER IT GETS

INFO@INVESTPUNJAB.GOV.IN
WWW.INVESTPUNJAB.GOV.IN

THANK YOU