



HARYANA

January 2008



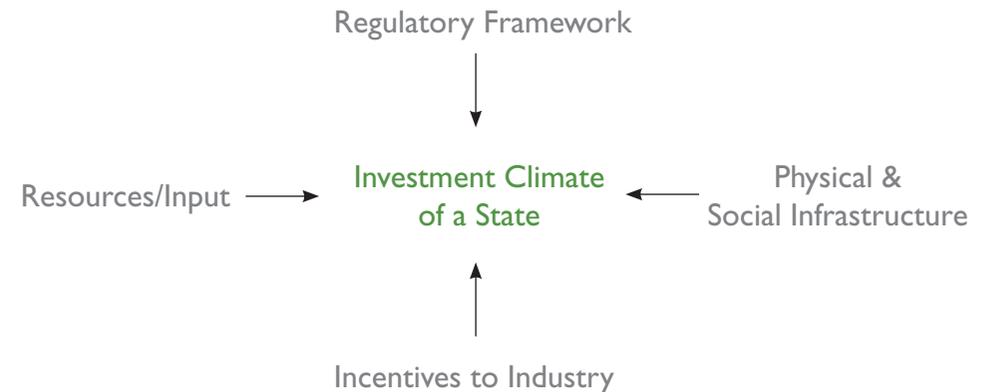
Investment climate of a state is determined by a mix of factors

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



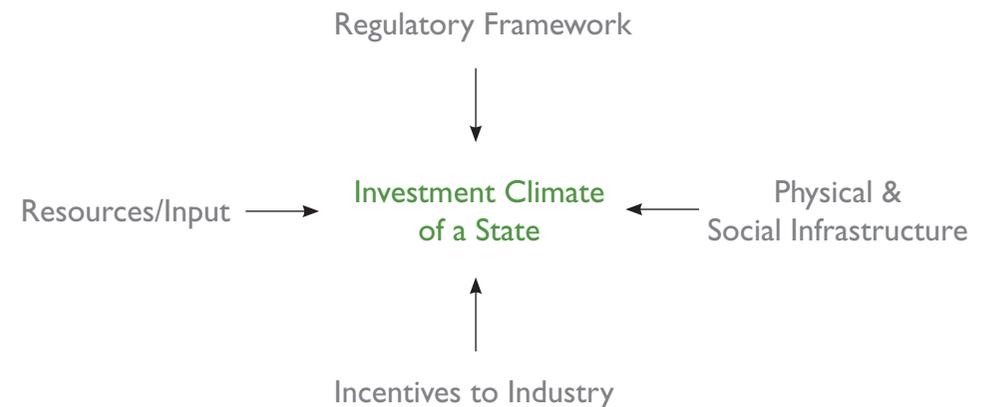
Investment climate of a state is determined by a mix of factors

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

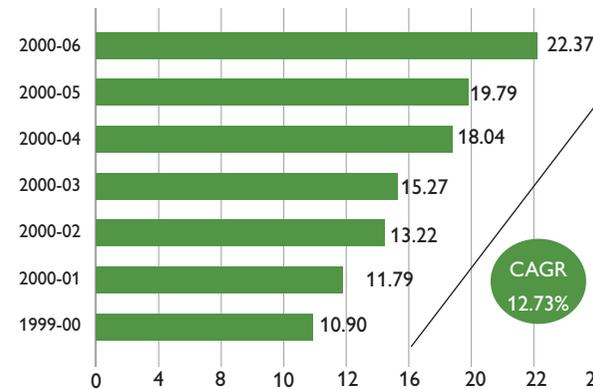
- **Haryana's performance on key Socio-economic indicators**
 - **Availability of social and physical infrastructure in the state**
 - **Policy Framework and Investment approval mechanism**
 - **Cost of doing business**
 - **Key industries and players**
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HARYANA'S PERFORMANCE ON KEY SOCIO-ECONOMIC INDICATORS

Haryana's economic performance is driven by all three sectors of the economy

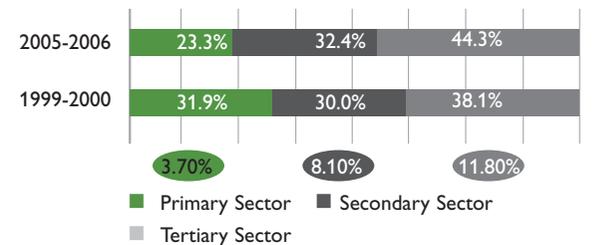
- The state's GDP grew an impressive 12.73% between 1999-00 and 2005-06 to reach US\$ 22.37 billion
- The Tertiary sector, has been the fastest growing, driven by growth in sub-sectors like IT and ITES
- Secondary sector growth driven by manufacturing in sub-sectors like automobile and auto components,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

Haryana's GSDP (US\$ billion)



Source: Economic Survey of Haryana, 2007

Percentage distribution of GSDP

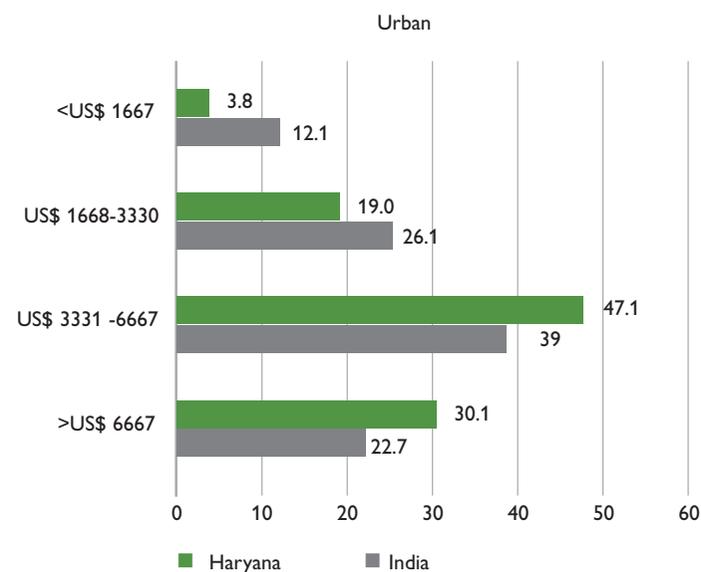


Source: Economic Survey of Haryana, 2006-07 and FICCI

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

Distribution of Households by Income (%)

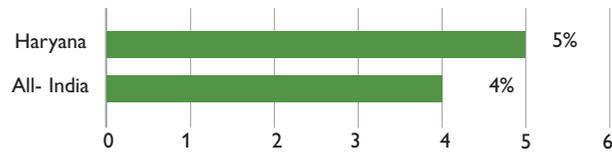


Source: The Market Skylilne of India 2006 by Indicus Analytics

Households in the State have High Disposable Incomes

Percentage Households with Asset Ownership

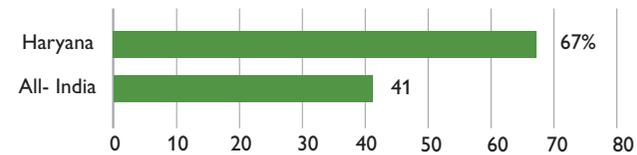
Four-wheelers



Source: The Market Skyline of India 2006 by Indicus Analytics

Percentage Households with Asset Ownership

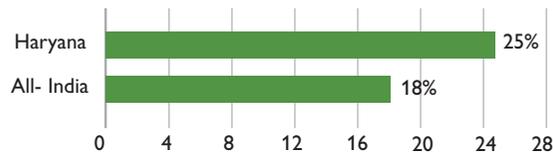
Television



Source: The Market Skyline of India 2006 by Indicus Analytics

Percentage Households with Asset Ownership

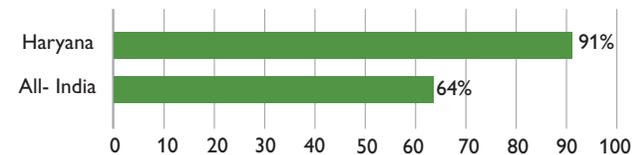
Two Wheelers



Source: The Market Skyline of India 2006 by Indicus Analytics

Percentage Households with Asset Ownership

Electricity



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)

Parameter	Large & Medium Industries	Small scale units
Working units (No.)	1,212	80,000
Production (US\$ billion)	3.0	1.0
CAGR of production (2000-05)	5,350	360
Fixed investment (US\$ billion)	200	870
Employment ('000 number)	1,212	80,000

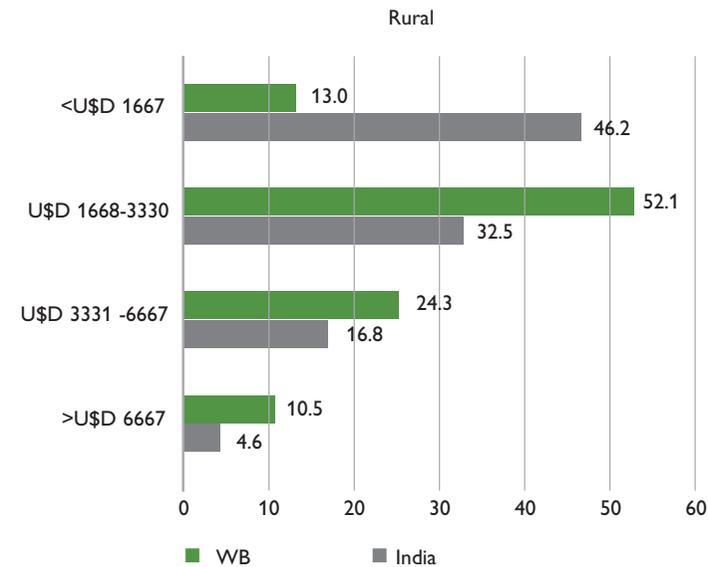
Source: Haryana State Industrial and Infrastructure Development Corporation Limited (HSIIDC)

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

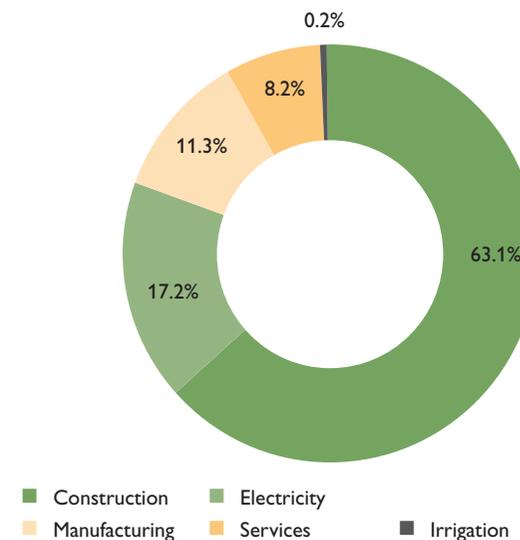


Source: The Market Skylilne of India 2006 by Indicus Analyticscs

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



Source: Monthly Review of States of India, CMIE March Report 2007

The top 10 districts constitute 76% of production

District	Share in production (per cent)	Industries
Faridabad	30.0	Tractors, motorcycles, switch gears, refrigerators, footwear, tyres, consumer durables
Gurgaon	27.0	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
Ambala	5.1	Hosiery, scientific and surgical instruments, metal casting, kitchen mixer grinders, submersible motor pumps, textiles
Sirsa	4.0	Seed processing, wrapping papers, milk chilling, rice shelling, chemicals, iron and steel fabrication, agriculture implements, leather goods, hard and straw board
Panipat	3.9	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
Karnal	2.4	Textiles, agro-based industries, leather products, floriculture, electronic motors, wooden and steel furniture
Yamuna Nagar	1.5	Metal industry, sugar, wood based industries, cement, steel, stone crushing
Bhiwani	1.0	Textiles
Hisar	0.9	Stainless steel, automobile repair, textiles, handlooms, pipes, food processing, cotton ginning and oil, engineering components, leather goods
Jind	0.3	Agro based industries, sugar mills, live-stock based industries, woollen blankets, foundry
Others*	23.9	
Total	100	

*Others include Kurukshetra, Sonapat, 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.

Status of Educational Institutes
7 Universities
44 Engineering Colleges
30 MCA Colleges
28 MBA Colleges
19 Pharmacy Colleges
53 Polytechnic
355 Under Graduate Colleges
75 Post Graduate College

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

	Haryana	All-India
Birth rate	25.1	24.8
Death rate	6.6	8.1
Infant mortality rate	42	63
Life expectancy at birth (years)		
Male	65.5	64.1
Female	70.0	65.4

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

Co-operative Societies	18,424
Primary Agricultural Credit Societies	2,433
Post Office Saving Banks	2 650,
Indian Commercial Banks	1,726
Co-operative Banks	373

Source: Reserve Bank of India

Transport Infrastructure is Adequate and is also being Upgraded

Roads

- 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

Infrastructure	Details
Export Promotion Industrial Park	This Park, along the Haryana-Delhi border, is meant for export oriented units in sectors like food processing, leather garments and accessories, electronics, telecommunications, automotives, auto parts, sports goods, handloom and ready-made garments
Food Parks	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
Gems and Jewellery Park	Gems and Jewellery Park has been created at Udyog Vihar in Gurgaon to promote the gems and jewellery industry
Industrial Model Townships (IMT)	IMT Manesar is being developed as a prominent cluster of automobiles and auto components. It has industrial, residential, commercial and recreational facilities
Industrial Clusters	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
Warehouse Complex/ Inland Container Depots	The state has 3 Inland Container Depots (ICDs) located at Faridabad, Panipat and Rewari. Many more sector ICDs are coming up in the state
Special Economic Zones (SEZs)	Haryana has 8 notified SEZs, 29 SEZs with formal approval and 28 SEZs with in-principle approval.

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 conducive 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

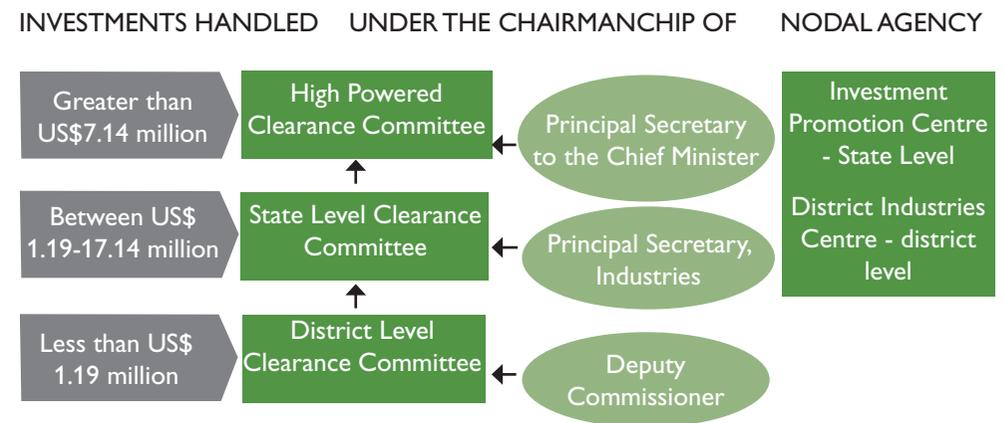
Information Technology Policy 2000

- 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

Single window clearance mechanism in Haryana



Concerned Agencies & Time estimates for starting business in Haryana

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

COST OF DOING BUSINESS

Cost of Doing Business in Haryana

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

*Source: Director of Industries

**Source: Property dealers/ Real estate agents

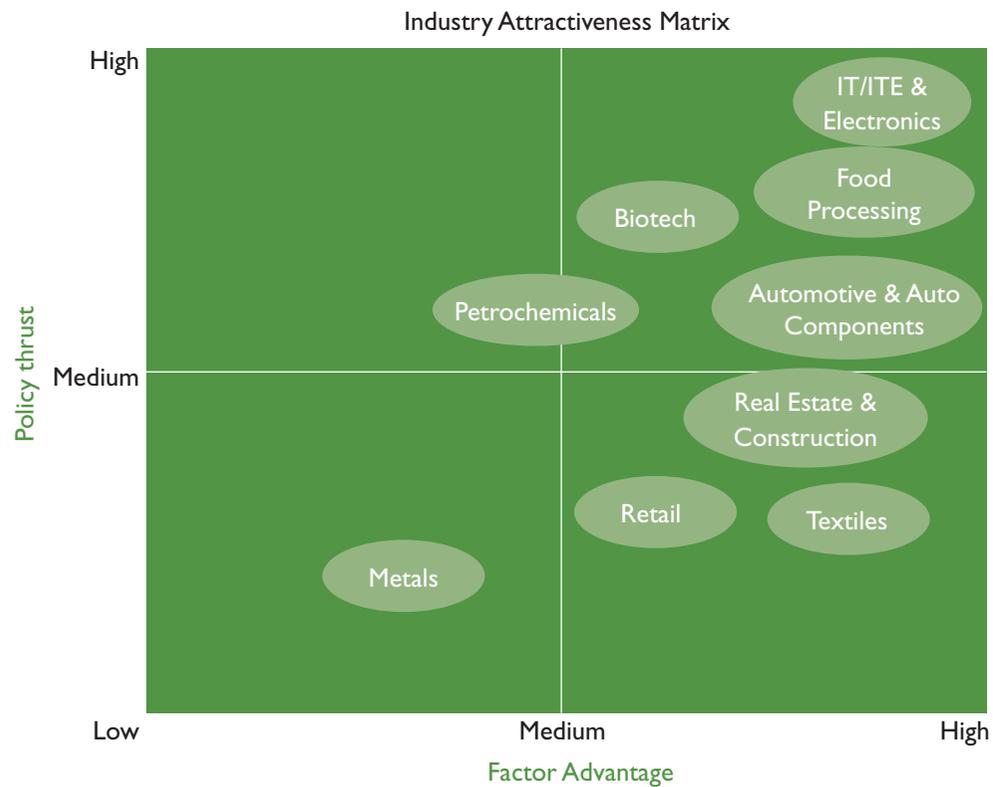
***Source: Leading hotels in the state

**** Source: Haryana Electricity Regulation Commission

***** Source: Water Supply and Sanitation Department

KEY INDUSTRIES AND PLAYERS

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

Key Players
Yakult Danone
GlaxoSmithKline Consumer Healthcare

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
DCM Textiles
Orient Craft
Benetton India

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

Key Players
Maruti Suzuki
Hero Honda
Honda Motorcycle and Scooter India
Sona Koyo Steering Systems
Yamaha Group
Escorts
Munjal Showa
Talbro Automotive Components
Rico Auto Industries
Omax Auto

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 Naptha 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
IBM Daksh
Convergys India Services
Genpact
Tata Consultancy Services
WNS
Wipro Infotech
Evalueserve

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
Proagro Seeds Company Private Limited
Eli Lilly
Ranbaxy Laboratories

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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