

MAHARASHTRA

The Enduring Leader

- Strategically located with a long coastline and borders with several states
- Progressive Government taking measure to facilitate industrial infrastructure
- Presence of large number of diverse industries and a well-developed service sector
- 'Financial and Trade' capital of India
- Presence of specialized institutes that offer skilled resources for industries and services sector
- Accounts for 30 percent of the total FDI inflow in India



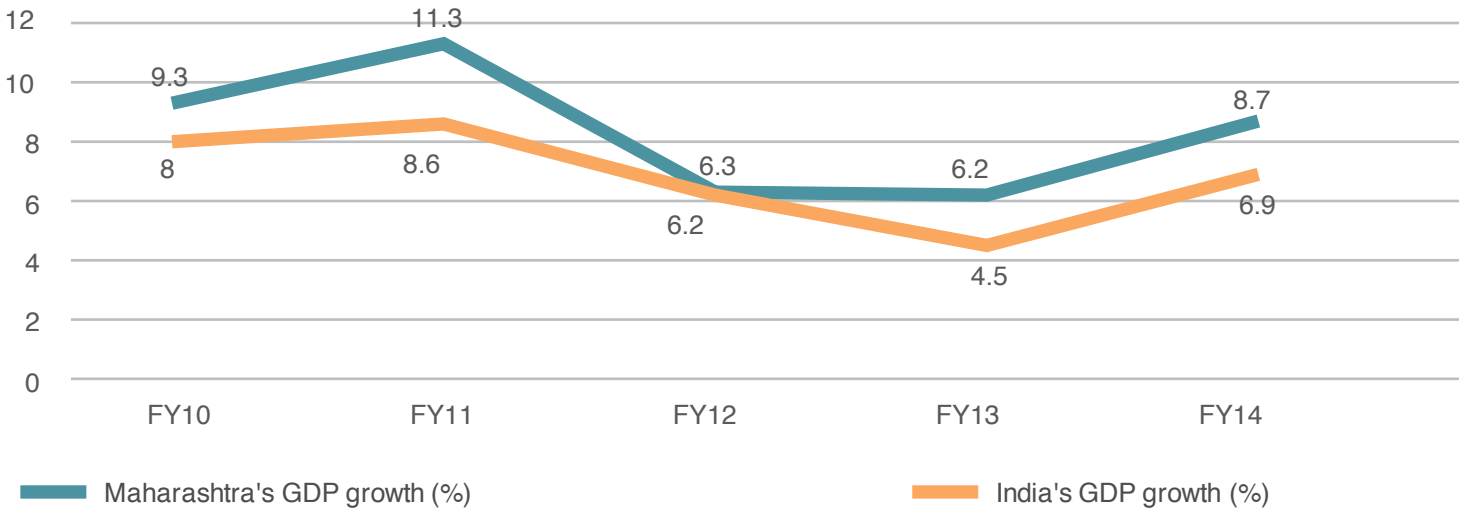
MAHARASHTRA

Economic Profile

One of the biggest contributors to Indian economy, the state has been growing at a faster pace than all-India average in most periods and is expected to continue the momentum

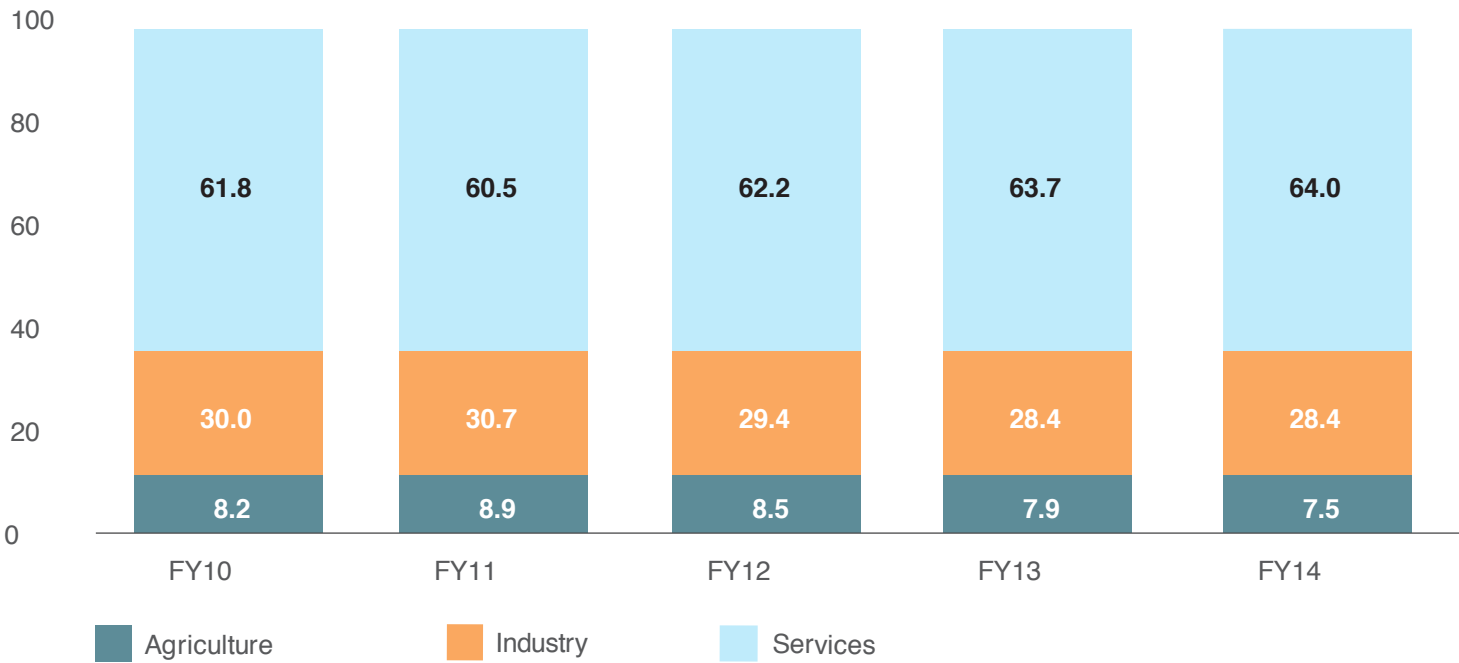


Economic growth (%)

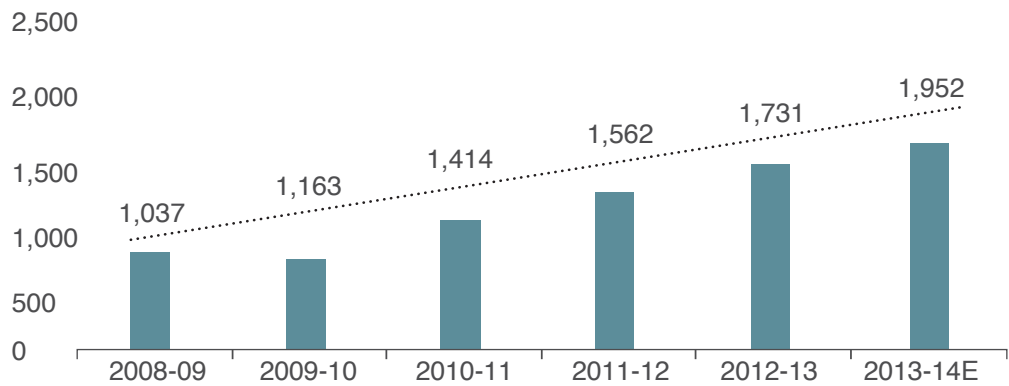


Source: CSO

Maharashtra's GDP composition (%)



Per Capita Income (in USD)



Manufacturing sector average contribution to Maharashtra's GSDP is **20.9%**

Per Capita Income of Maharashtra is estimated at **1,952 USD** at current prices for the year 2013-14

Source: "FDI Statistics" DIPP; CMIE; *Estimated

MAHARASHTRA

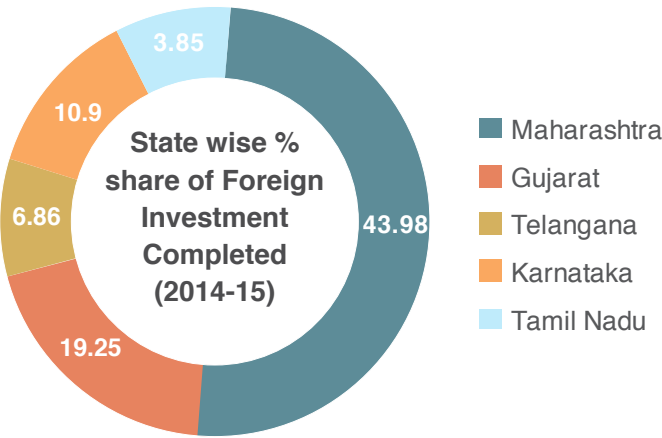
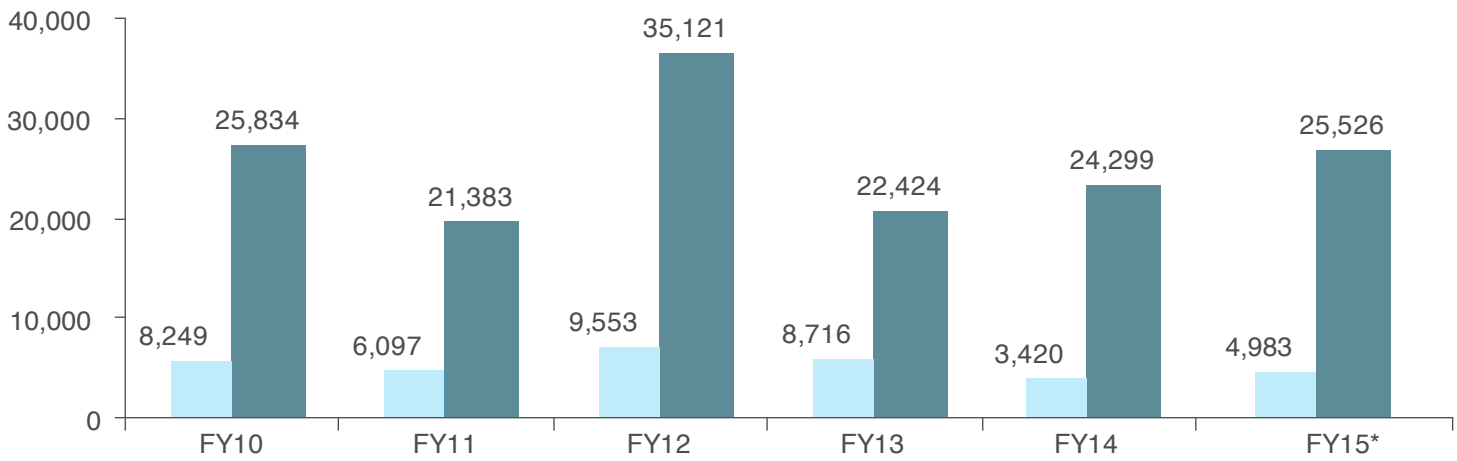
Investment Profile

Attracts the highest FDI in the country; expected to maintain its lead in the future as well

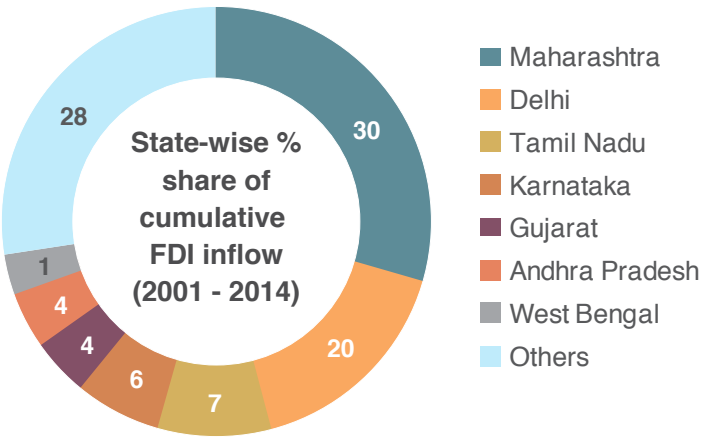


FDI inflow and state contribution
(US\$ million; %)

■ Maharashtra ■ India



Number of Foreign Private Sector Investment Projects completed in 2014-15 were worth: **USD 6.27 bn**



Maharashtra's share in the total FDI inflow in India during the period 2001-2014 was: **30%**

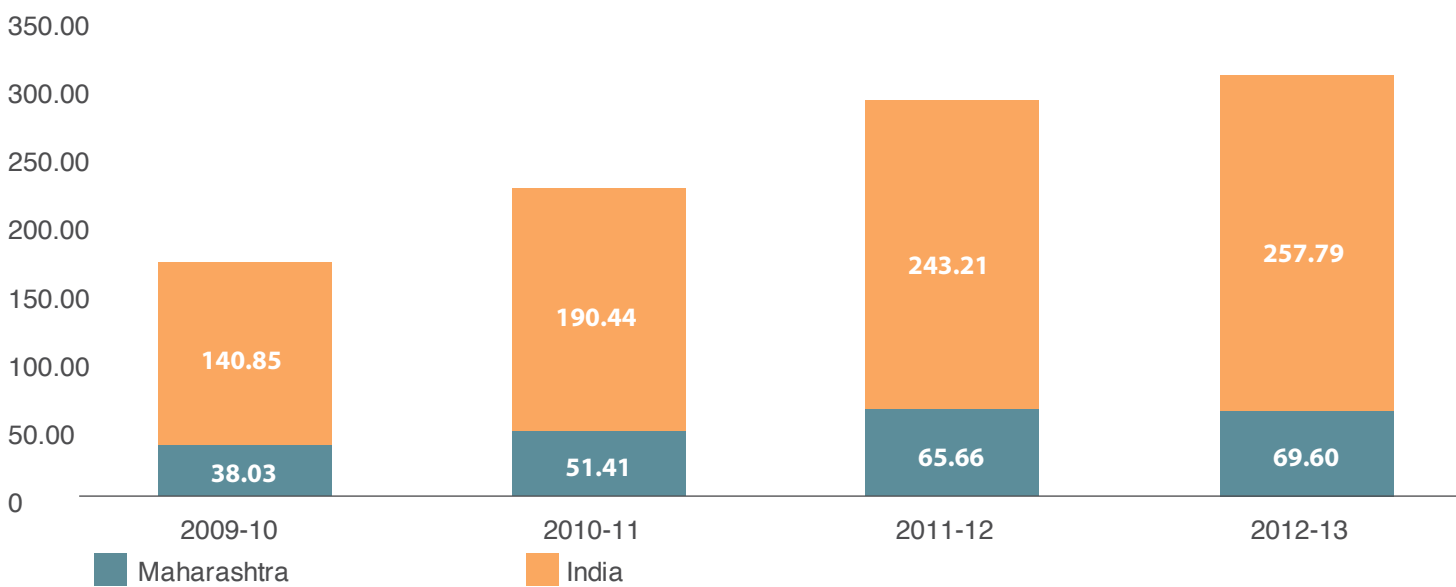
Maharashtra has attracted USD 70.95 billion of FDI over the 2000 – 2014, which is the highest among all states in India
Source: Economic Survey of Maharashtra 2014-15

MAHARASHTRA

Exports Profile



Export Trends (in Billion USD)



- Contribution of 27% of total exports in India
- Maharashtra’s export totalled USD 65.7 billion over 2012-13
- Initiatives like giving awards based on export performance

The main products exported from the State are:

- Gems & Jewellery
- Software
- Textiles
- Readymade garments
- Cotton yarn
- Metal & metal products
- Agro-based products
- Engineering items
- Drugs & pharmaceuticals
- Plastic & plastic items



MAHARASHTRA

Skilled Manpower

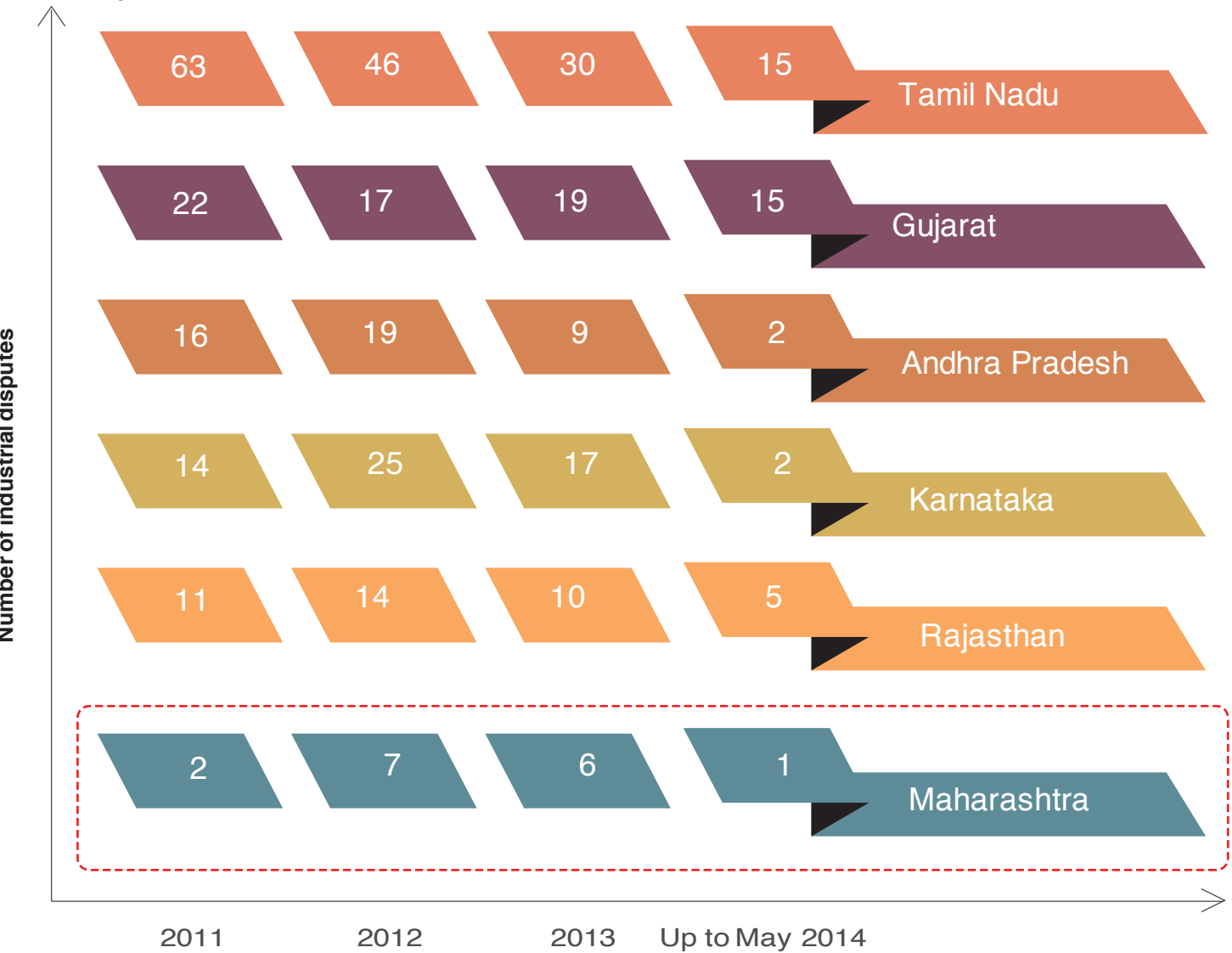
Institutes

Streams	No. of Institutes	Enrolments per year
General Education (Arts, Science, Commerce)	3300	15.20 lacs
Engineering	1,074	5.43 lacs
Architecture	75	10 thousand
MBA/MMS and PGDM	516	36 thousand
Hotel Management and Catering Technology	23	868
Pharmacy	462	38 thousand
Masters in Computer Application	148	15 thousand
Industrial Training Institutes	766	1.05 lacs
Medical Education	293	28.5 thousand

- State has more than **6,000 institutes** that **enroll over 2.5 million** students per annum
- State has the well-renowned **Indian Institute of Technology (IITs)** at Powai in Mumbai
- Home to reputed R&D institutes, viz. BARC, C-DAC , Tata Institute of Fundamental Research

Source: Economic Survey of Maharashtra, 2014-15
Provisional Data; Ministry of Labour & Employment, GoI

Labour Disputes



The state is one of the most industry-friendly states with one of the lowest labour disputes



MAHARASHTRA

Infrastructure Profile - Road



Road Type	Road Length (km) (As of March 2012)
National Highway	4,376
State Highway	34,157
Major District Highway	50,256
Other District Highway	47,529
Village Roads	1,06,601
Total Road Length	2,42,919

- Well Connected to other parts of India through 18 National Highways
- Total road length of 2,42, 919 km
- Road density of 133.41 km per 100 sq km of area
- 93 km Mumbai-Pune Expressway is India’s first six-lane concrete road



Planned Road Infrastructure Projects

- Mumbai Trans Harbour Link (MTHL) is a Proposed 22 km, freeway grade road bridge connecting Mumbai and Navi Mumbai. When completed, it would be the longest bridge in India.
- Mumbai – Aurangabad – Nagpur Expressway connecting two major cities of Maharashtra which will save more time

Mumbai – Nagpur Expressway to connect capital cities of Maharashtra, i.e. Mumbai and Nagpur by a highway of 6 lanes via Ghoti, Aurangabad and Amravati at the cost of INR 30,000 crore. The Expressway would be equipped with optical fiber network, CCTV and Wi-Fi coverage and will shorten the Mumbai-Nagpur distance to an eight-hour drive. Technology parks, smart cities, and educational complexes would be built along the route of the Expressway.



Source: Economic Survey of Maharashtra, 2013-14

MAHARASHTRA

Infrastructure Profile - Rail

The unique and innovative RO-RO (roll on – roll off) service of Konkan Railway which carried piggy back trucks on railway flat wagons and 3.5 lakhs goods have been carried so far

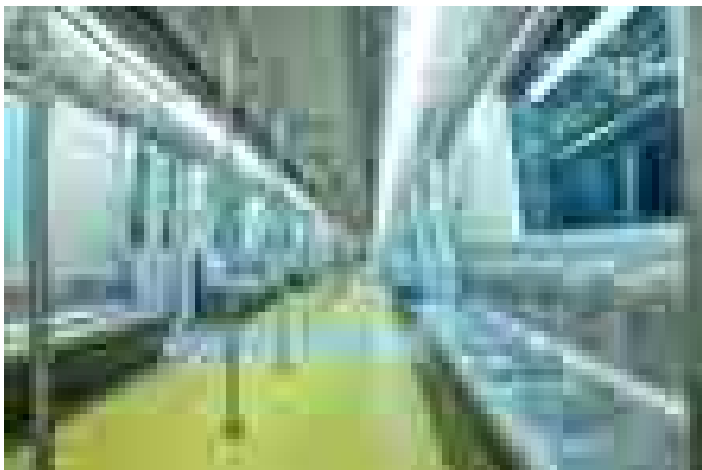
- Well Connected to other parts of India through 5,984 km railway network
- Headquarters of Central and Western Railways in Mumbai
- Western Railways include country’s western coast including the Mumbai Port
- Suburban railways carry around 6.94 million passengers every day



Planned Rail Infrastructure Projects

- Railway line of 33.7 km connecting Dighi Port with the nearest rail head Roha on Konkan Railway, which is part of one of the projects of connecting ports with rail
- Metro rail projects are planned for cities such as Mumbai, Nagpur and Pune

Source: Economic Survey of Maharashtra, 2013-14



MAHARASHTRA

Infrastructure Profile - Airport

- Three International and Seven Domestic Airports
- Total Traffic in Mumbai airport and Pune airport was around 31 million and 4 million in 2014
- Total Cargo handled at Mumbai, Pune was 1.81 lakhs MT and 0.21 lakhs MT
- Terminal T2 is a state-of-the-art world-class terminate with capacity to handle 40 million passengers per annum



Navi Mumbai International Airport (Planned)

- In order to reduce congestion in Mumbai International Airport, an additional airport has been proposed at Navi Mumbai. It is expected to be commissioned by 2019 with an initial capacity of 10 million passengers per annum

Source: Economic Survey of Maharashtra 2014-15; IBEF, AAI: Airport Authority of India

MAHARASHTRA

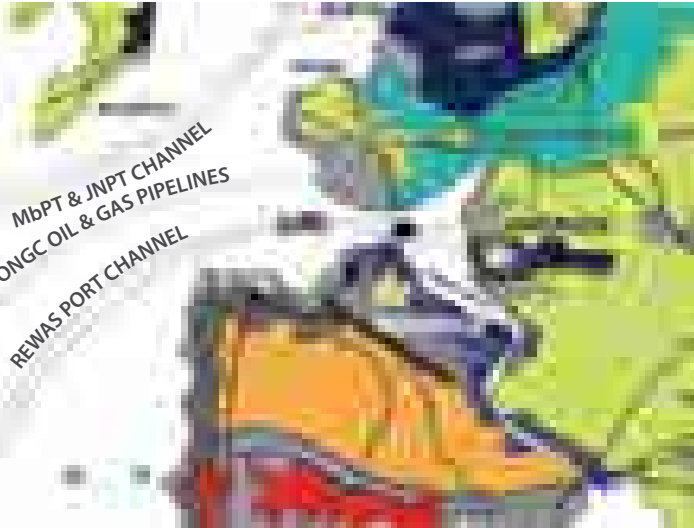
Infrastructure Profile - Port

Port-Rail Connectivity

- For Jaitapur Port Project, a special purpose vehicle is being formed between Konkan Railway Corporation, Maharashtra Maritime Board and JSW Jaigad Port to lay a 33.7 km rail line to connect the port to the railway network
- Two Principal Ports along 720 km coastline: Mumbai Port Trust (MBPT) and Jawaharlal Nehru Port Trust (JNPT)
- 53 Minor Ports
- MBPT and JNPT handled 416.55 lakh MT and 480.73 lakh MT of cargo traffic over 2014 -15
- Special committee set up to fast track all ports projects greater than INR 1000 cr

Planned Port Infrastructure Project at Karanja

- Karanja Port Project, a multipurpose terminal facility is being set up along 1,000 meter waterfront over 200 acres of inter-tidal zone. This facility will serve as a complement to the existing MBPT and JNPT ports and will ease the cargo traffic congestion in the area

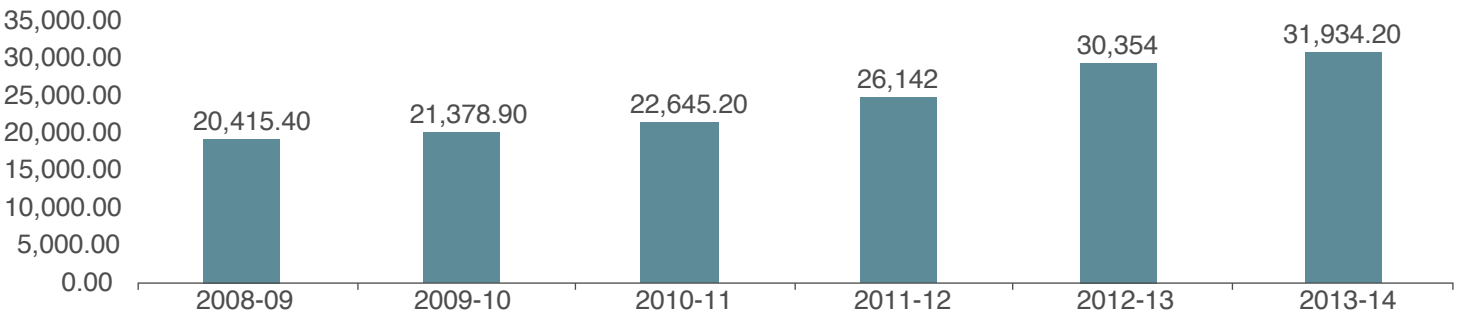


Source: Economic Survey of Maharashtra 2014-15 ; IBEF , AAI : Airport Authority of India

MAHARASHTRA

Infrastructure Profile - Power

Installed Power Capacity (MW)



- Total electricity generated during 2013-14: 91 billion kW
- Industrial sector is the largest consumer of the electricity
- Private sector contribution to total installed capacity is the highest with 54.5%
- Special committee set up to fast track all ports project greater than INR 1000 cr

Planned Power Infrastructure Projects across the State

- Solar power projects of 130 MW capacity have been commissioned by MAHAGENCO
- GoM has adopted the policy of achieving the target of renewable purchase obligation up to 10 percent

Source: Economic Survey of Maharashtra, 2013-14



MAHARASHTRA

Infrastructure Profile - Delhi Mumbai Industrial Corridor (DMIC)

Delhi - Mumbai Industrial Corridor (DMIC) is India's most ambitious Infrastructure programme aiming to develop new industrial cities as 'Smart Cities' and converging next generation technologies across infrastructure sectors

Project Details

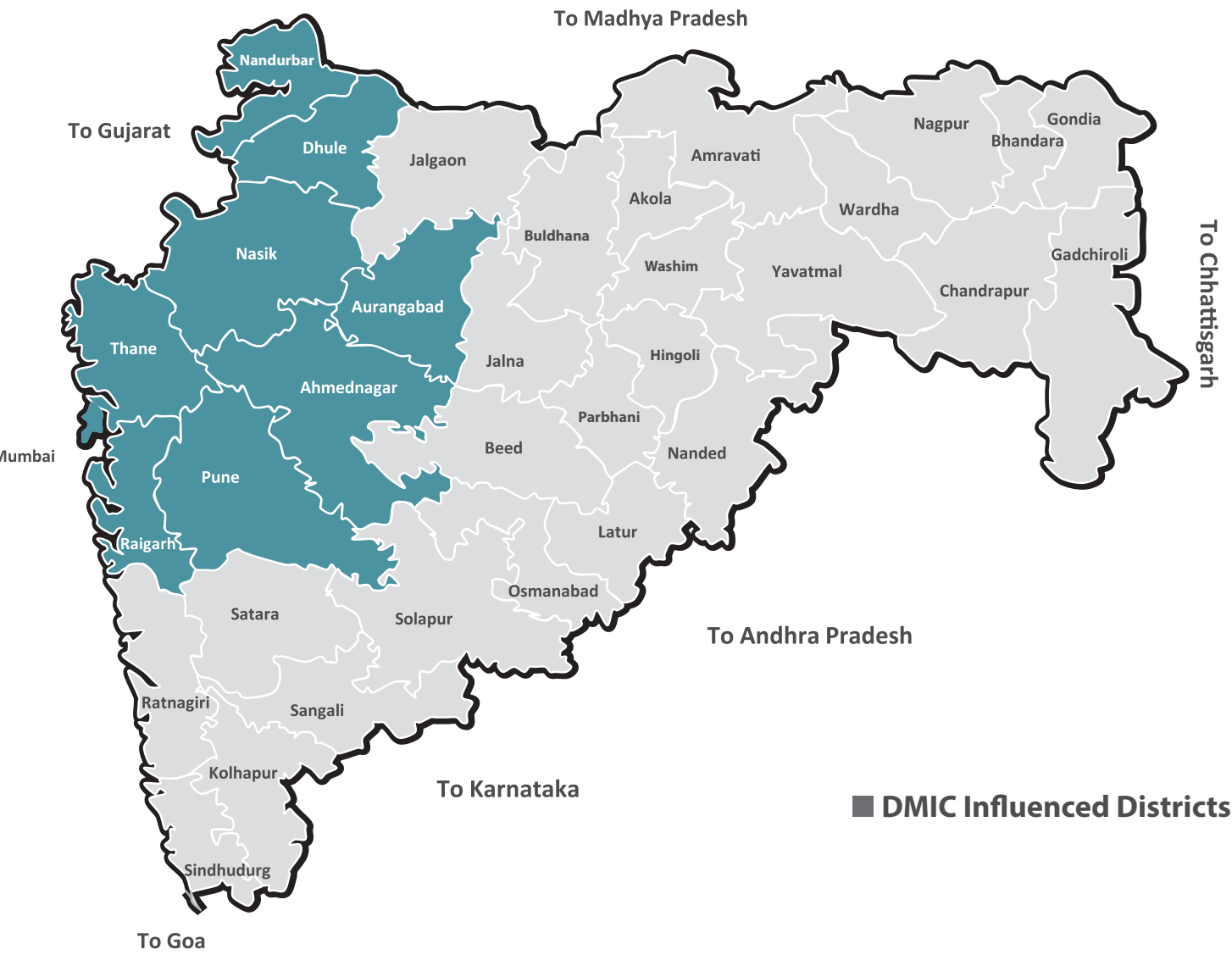
- Length: 1,483 km
- States: UP, Delhi, Haryana, Rajasthan, Gujarat and Maharashtra
- End terminals: Tughlakabad and Dadri in the National Capital Region of Delhi and Jawaharlal Nehru Port (JNPT) of Mumbai
- Project implementation: SPV - Delhi Mumbai Industrial Corridor Development Corporation
- Objectives: To provide high-speed connectivity for high axle load wagons (25 tonnes) of double stacked container trains; to create at a global manufacturing and trading hub



MAHARASHTRA

Delhi-Mumbai Industrial Corridor in Maharashtra

India's most ambitious Infrastructure program aiming to develop new industrial cities as 'Smart Cities' and converging next generation technologies across infrastructure sectors



- District Covered in Maharashtra: 8
- It passes through Dahanu Road, Virar, Vasai Road, Diva and terminates at the Jawaharlal Nehru Port in Navi Mumbai

- Additional Industrial / Manufacturing jobs: 2.3 million
- Additional industrial output: INR 20 trillion dollar

- Impact Area in Maharashtra: 29 %
- Population of the state under influence area: 26%

- Development of Shendre Bidkin Mega Industrial Parks and Dighi Ports industrial area is under progress
- 4 development nodes have been identified in the influence area of DMIC

- Major development nodes have been identified in the influence area of DMIC i.e:
- Shendra-Bidkin Industrial Area, Aurangabad
- Igatpuri-Nashik-Sinnar Investment Region
- Pune-Khed Industrial Area
- Industrial Area with Greenfield Port at Dighi



Shendra Bidkin Mega Industrial Park- Site

Site Connectivity

By Road
Shendra industrial area is located along Aurangabad-Jalna (NH-211) about 20 km from Aurangabad, 220 km from Nasik, 255 km from Pune & 393 km from Mumbai.

By Rail
The nearest railway station is Chikalthana - 10 km, Aurangabad - 20 km, Nasik - 220 km, Pune - 255 km, Mumbai - 380 km.

Airports
Domestic Airport - Chikalthana (Aurangabad) - 10 km, Pune 265 Km, Nearest International Airport-Mumbai-380 km.

Water Port
Nearest port - JNPT (389 km).



Dighi Port Industrial Park- Site

Site Connectivity

By Road
The port is connected to NH 17 via 5 state highways. Pune is at a distance of 132 km whereas Mumbai is at a distance of 154 Km. Aurangabad is at a distance of 381 km.

By Rail
The nearest railway station is Indapur-47 km. Major Railway station like Panvel is at a distance of 120 km whereas the Pune railway station is at a distance of 296 km

Airports
Mumbai is the nearest Domestic/ International Airport at a distance of 296 km.

Water Port
Apart from the inhouse Dighi Port, JNPT, Mumbai is at a distance of 121 km.



MAHARASHTRA

Infrastructure

Profile - Multi-Modal International Cargo Hub and Airport (MIHAN)

MIHAN is one of the biggest economical development projects in terms of investment with the aim to exploit the central location of Nagpur and convert the present airport into a major cargo hub with integrated road and rail connectivity

- MIHAN project consists of two parts, namely 'International Ports' and a 'Special Economic Zone'
- Maharashtra Airport Development Company (MADC) formed for development of MIHAN
- Area Covered: 4354 hectares
- This area also includes residential, hotels, roads, water supply and drainage, sewage system and entertainment
- It is one of the largest aviation projects in India
- Target to serve 14 million passengers and handle 0.87 million tons of cargo
- Expected Revenue to be generated: USD 850 million



MAHARASHTRA

Infrastructure Profile - Metro Rail Projects: Mumbai, Pune, Nagpur

Metro Rail System is created to enhance the quality of life of the citizens of Nagpur and be instrumental in the overall development of the city by making it more vibrant and attractive

MUMBAI METRO

- No. of Corridors: 9 corridors
- Length: 172 km (62 km is proposed underground and the rest is elevated)
- Versova – Andheri – Ghatkopar corridor is completed and operational

PUNE METRO

- No. of Corridors: 2 corridors
- Length: 82 km
- Pune Metro Rail Corporation (PMRCO, a special purpose vehicle has been set up for the project)

Source: Economic Survey of Maharashtra, 2013-14

NAGPUR METRO

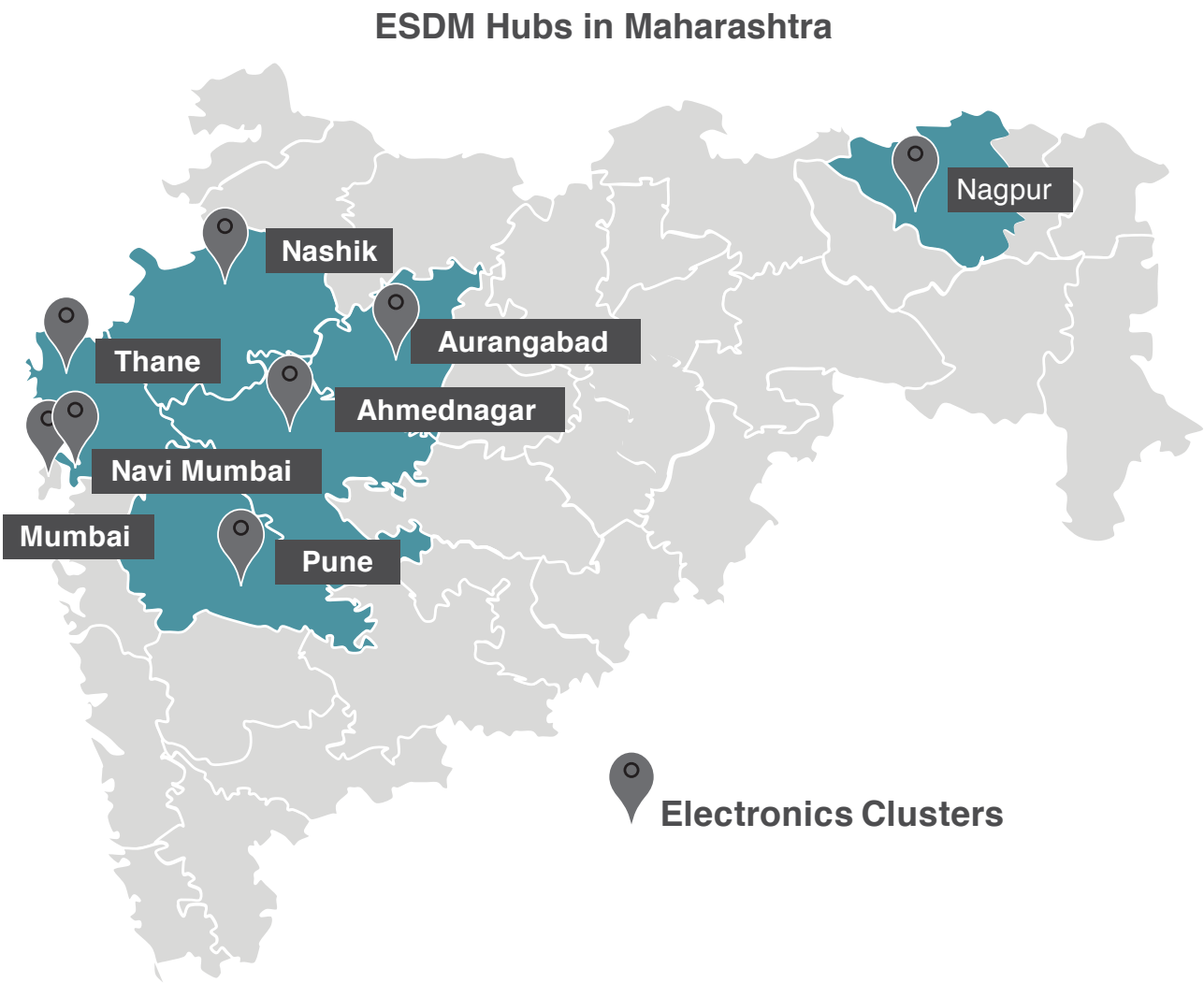
- No. of Corridors: 2 corridors
- Length: 38.2 km
- Nagpur Metro Rail Corporation Limited (NMRCL), a special purpose vehicle has been set up for the project Estimated Direct Employment: 1700



MAHARASHTRA

ESDM Sector

- Maharashtra occupies a significant share of 30.49 percent the industrial output of India’s Machinery, Computer, Electronics, Optical Products and Equipment Manufacturing Sector in 2012-13
- Maharashtra has identified ESDM as a sector of focus
- State to set up 3 brownfield EMCs at Pune, Aurangabad and Navi Mumbai
- Eight electronic manufacturing clusters have been notified in the State by the Government of India.
- Within Pune, Talegaon and Khed are two well-established ESDM Hubs



Key Industrial Players

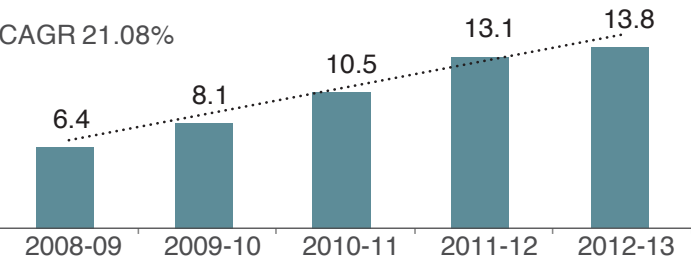


MAHARASHTRA

Auto and Auto Component Sector

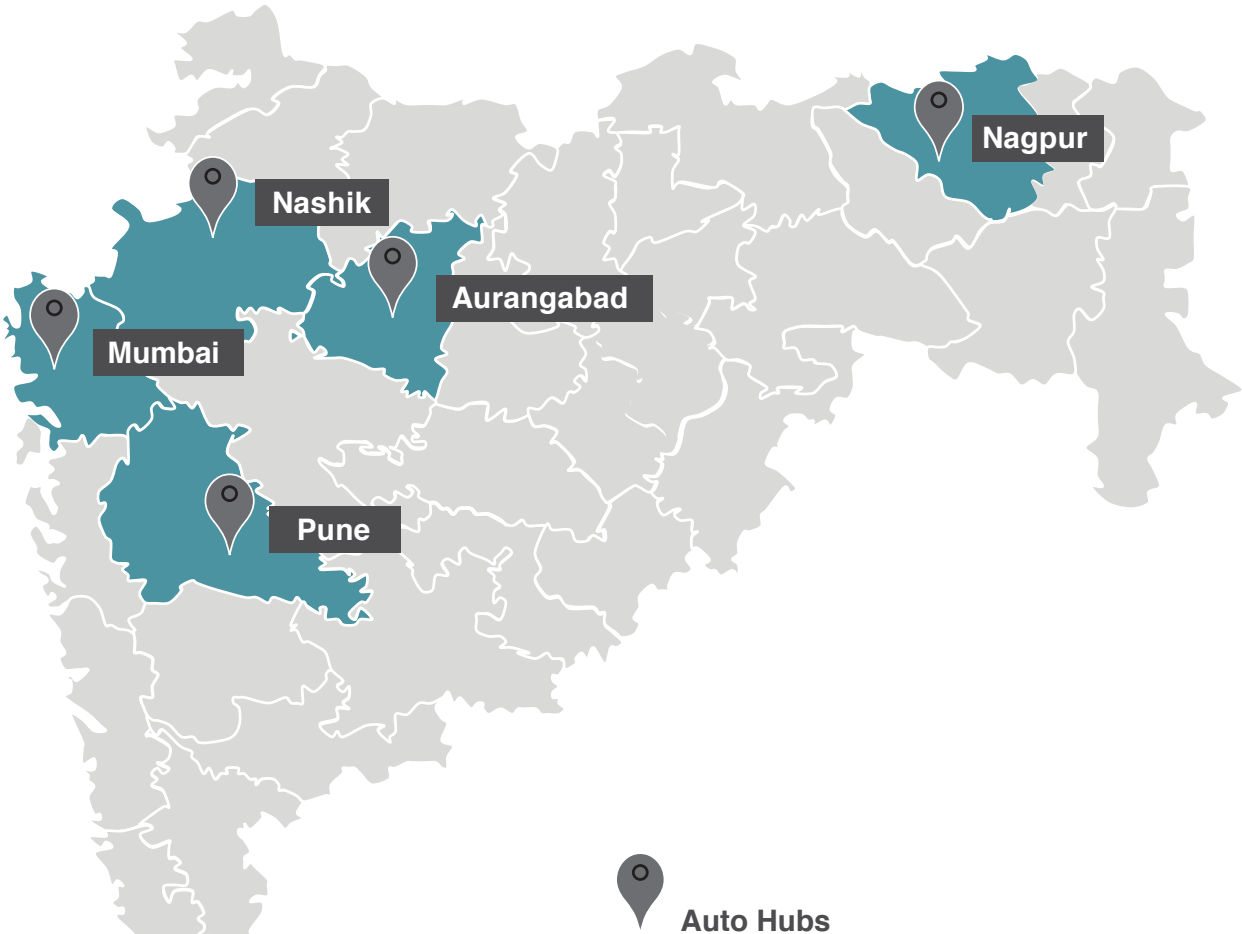
Auto Hubs in Maharashtra

Gross Value of Output of Auto Sector in Maharashtra (Billion USD)



* Estimated Domestic and Export sales of Auto in India

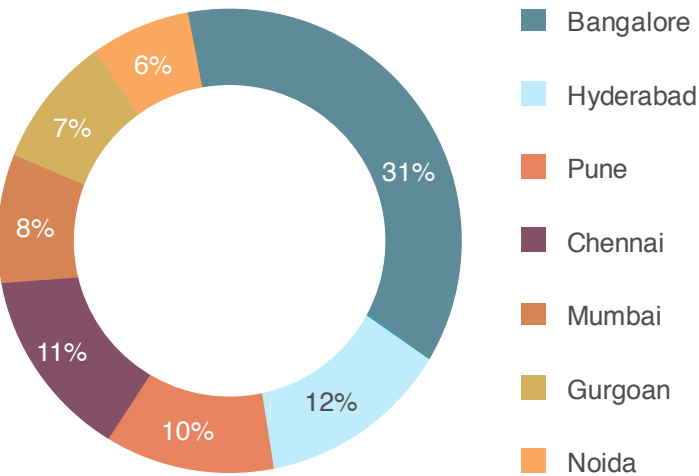
- Maharashtra accounts for approximately 38.0 percent of the country’s output of automobiles by value.
- It has leading auto industry hub of the country with market share of 21 per cent in India
- The auto industry in Maharashtra has CAGR of 21.08% from 2009 to 2013
- Pune is the largest auto hub of India with over 4,000 manufacturing units in the Pimpri-Chinchwad region alone



Key Industrial Players

MAHARASHTRA IT-ITeS Sector

Tier I cities software export contribution in FY2013-14



- Maharashtra accounts for more than 20% of the country's software exports
- Revenues from the IT & ITeS sector in Maharashtra grew to around 7.5 per cent over 2011-12
- 40% of India's internet penetration, 35% of PC penetration, 169,000 trained technical personnel added to the manpower pool each year, 465 approved IT private parks and 37 public IT parks developed by MIDC, CIDCO and STPI
- Pune and Mumbai together have the lion's share in IT export of more than USD 8 billion

IT Policy Incentives

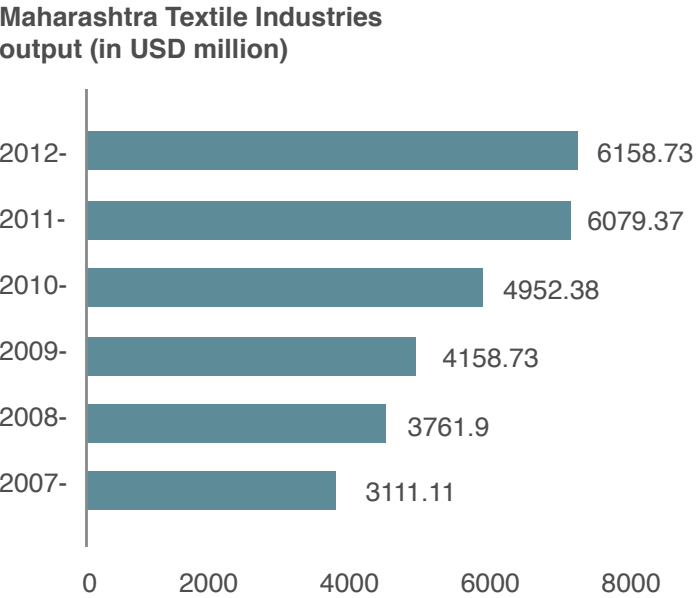
- Exemption from Stamp Duty and Electricity Duty, power supply at industrial tariff, electricity tariff subsidy
- **Up to 200% additional Floor Space Index (FSI)** in IT parks
- **Property taxes reduced** for IT t/ BPO units same as residential rates
- Registered IT / ITeS units shall be **exempt from Octroi/ Local Body Tax (LBT) / entry tax / escort tax or other cess or any tax**
- IT / ITeS will be allowed to **be set up in any zone**
- IT / ITeS Industry will be **permitted to work 24 x 7 x 365 days** without any close down
- Incentives for **Integrated IT Townships (IITT) and Data Center** located anywhere in the state
- Special encouragement for the animation, visual effects, gaming and comic sector
- Financial assistance for training program



Key Industrial Players

MAHARASHTRA

Textile Sector



Policy Support for Textile Industry

Textile incentives are add-on to the incentives applicable under PSI

- 5 - 7% interest subsidy for all new projects
- 10% capital subsidy for new project in Vidarbha, Marathwada and North Maharashtra and D+ region of rest of Maharashtra
- 10% Capital subsidy scheme for modernization of existing powerloom units belongs to Scheduled Castes/Tribe and minority communities
- 25% to 35% Capital Subsidy to self financed textile projects all across Maharashtra
- To avail benefits under state’s textile policy, registration with Textile commissioner, Mumbai is not mandatory (UID is not required)

Integrated Textile Parks

- Central Scheme - To develop Textile park in Maharashtra and provide world class essential infrastructure for textile industries
- Based on Public – Private partnership model and execution by private agency
- Financial assistance from central government - up to 40% of project cost or maximum up to 40 Cr in terms of grant / equity

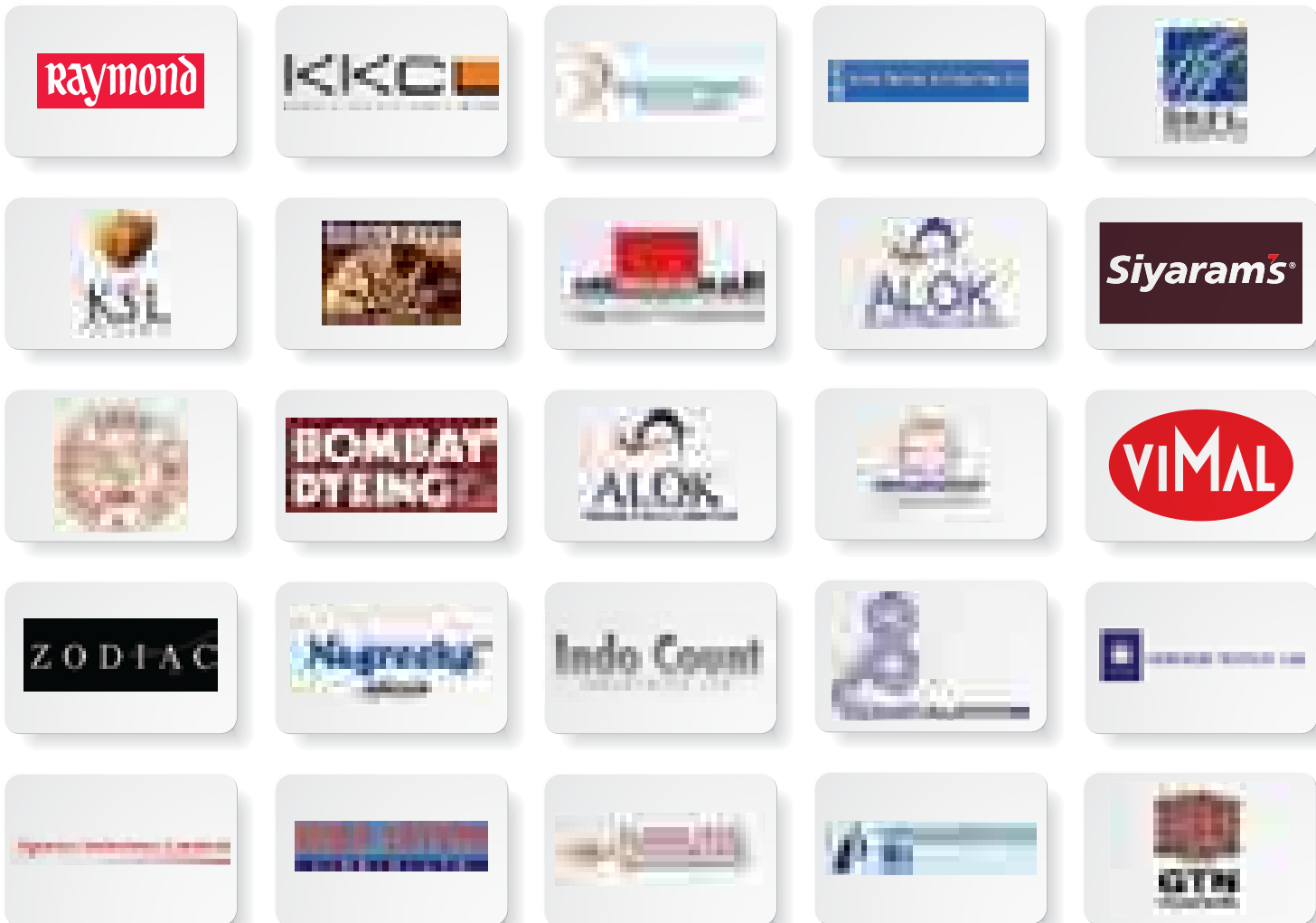
- Financial assistance from state government - up to 9% of project cost or maximum up to 9 Cr, whichever is less
- SPV (Special purpose vehicle) has to submit proposal to central government for approval, once approved, first installment gets disbursed to start the project

Integrated Processing Development Scheme (IPDS)

- For establishing new textile processing park or strengthening of existing processing park
- SPV has to purchase land for the Park
- Financial assistance from Central Government
 - 25% of project cost or maximum up to 37.50 Cr , whichever is less
 - For Zero discharge processing units, 50% of project cost or maximum up to 75 cr, whichever is less
 - For tradition processing units, maximum financial assistance up to 10 Cr
 - For units discharging waste water in deep sea, maximum financial assistance up to 75 Cr
- Finance Proportion – Central, State, Beneficiary, Financial agencies (50% - 25% - 15% - 10%)



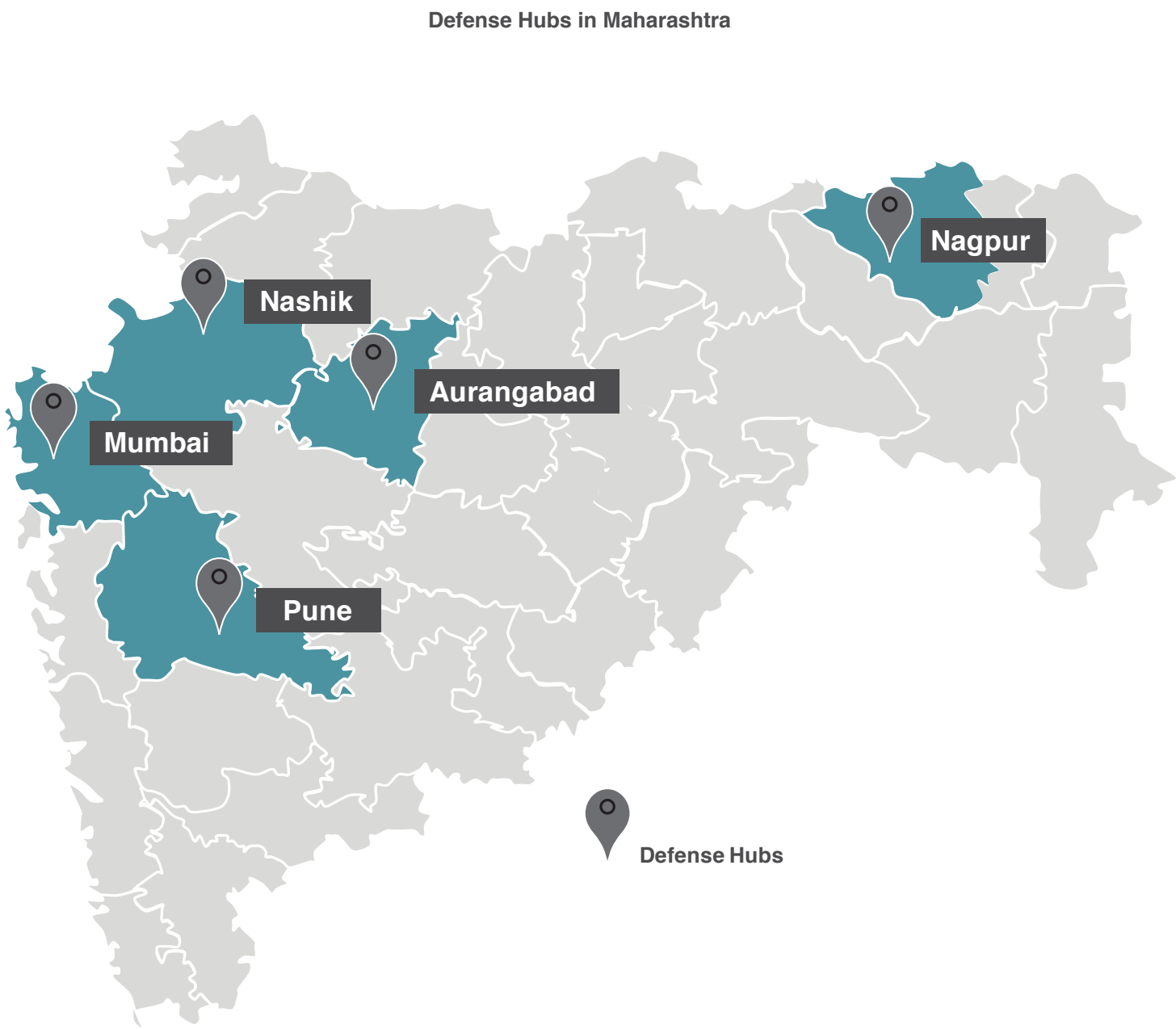
Key Industrial Players



MAHARASHTRA

Defense Sector

- Maharashtra occupies a significant share of 30.49 percent the industrial output of India's Machinery and Equipment manufacturing sector in 2012-13
- Nashik is home to public sector company like HAL which manufactures Russian Combat Aircrafts
- Mumbai has established ship-building manufacturers
- Pune has numerous defense institutes such as DRDO Research Labs, Ordnance factories and industries like Mahindra, Tata Motors, Bharat Forge amongst others

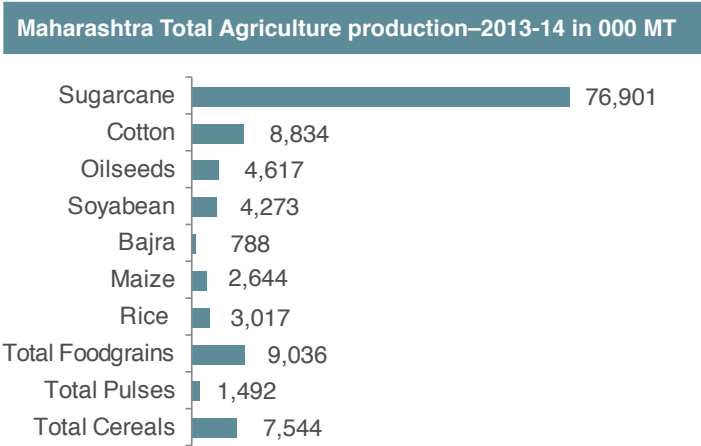


Key Industrial Players

MAHARASHTRA

Food Processing Sector

- Maharashtra has as many as 16,512 small and medium and 322 large scale food processing units.
- The food processing sector in the State has attracted 17.31 Billion USD worth of Foreign Direct Investment through 173 projects since 1991
- Eight Specialized Food Parks with facilities like cold storage, warehousing, advanced packaging, tera packaging & food testing laboratory.
- MIDC has set up three Wine parks
- Three Floriculture Parks are developed with world-class facility

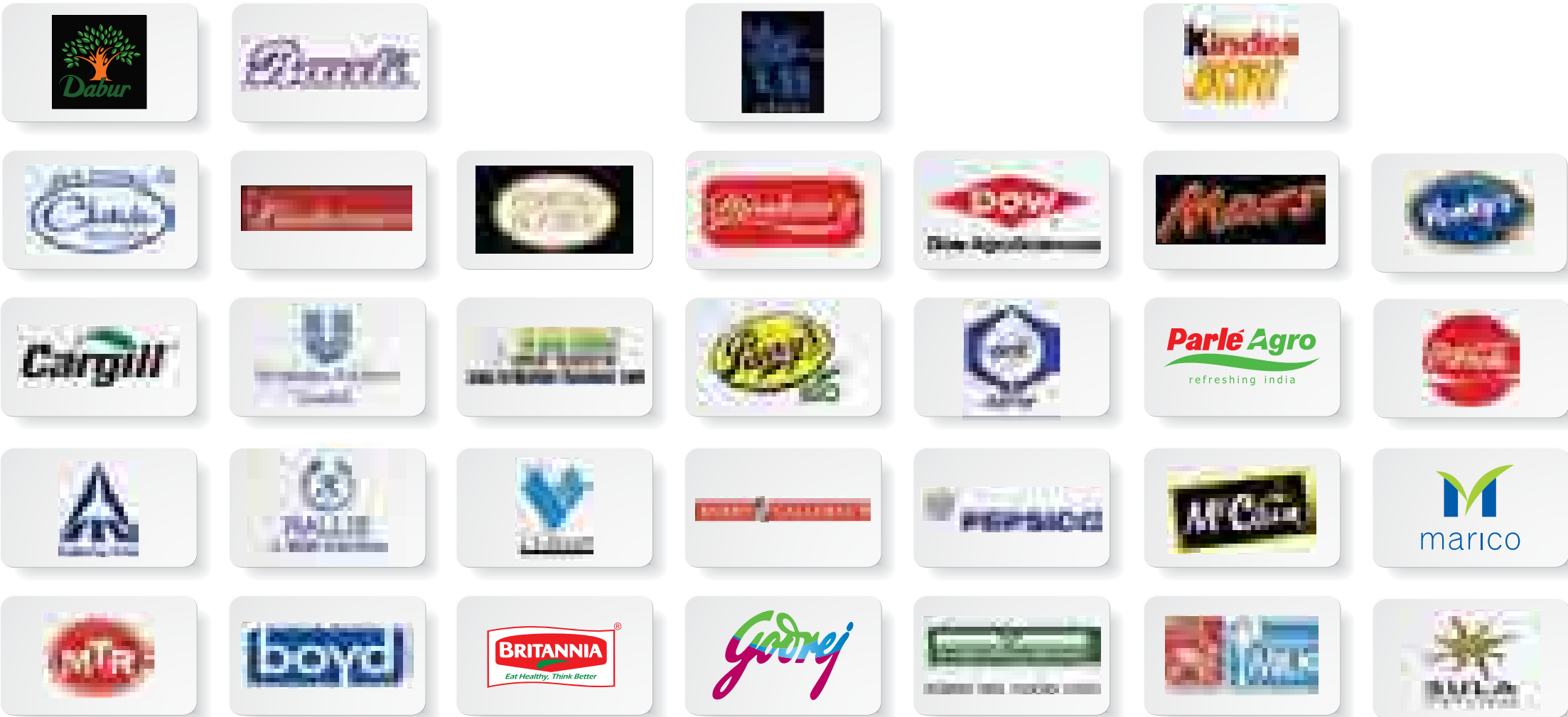


Grape Processing Policy

- 10% additional incentive on top of Investment Promotion Subsidy of projects create double employment
- For wine industries, concession for excise duty at 25% of the production expenditure incurred by units
- Preferential Area of Wine Industries enabling to requisite grant loan
- Simplification in system for license/permission for wine production by empowering collector to issue license within 30 days
- Establishment of Wine Institute for R&D, training and quality of wine



Key Industrial Players

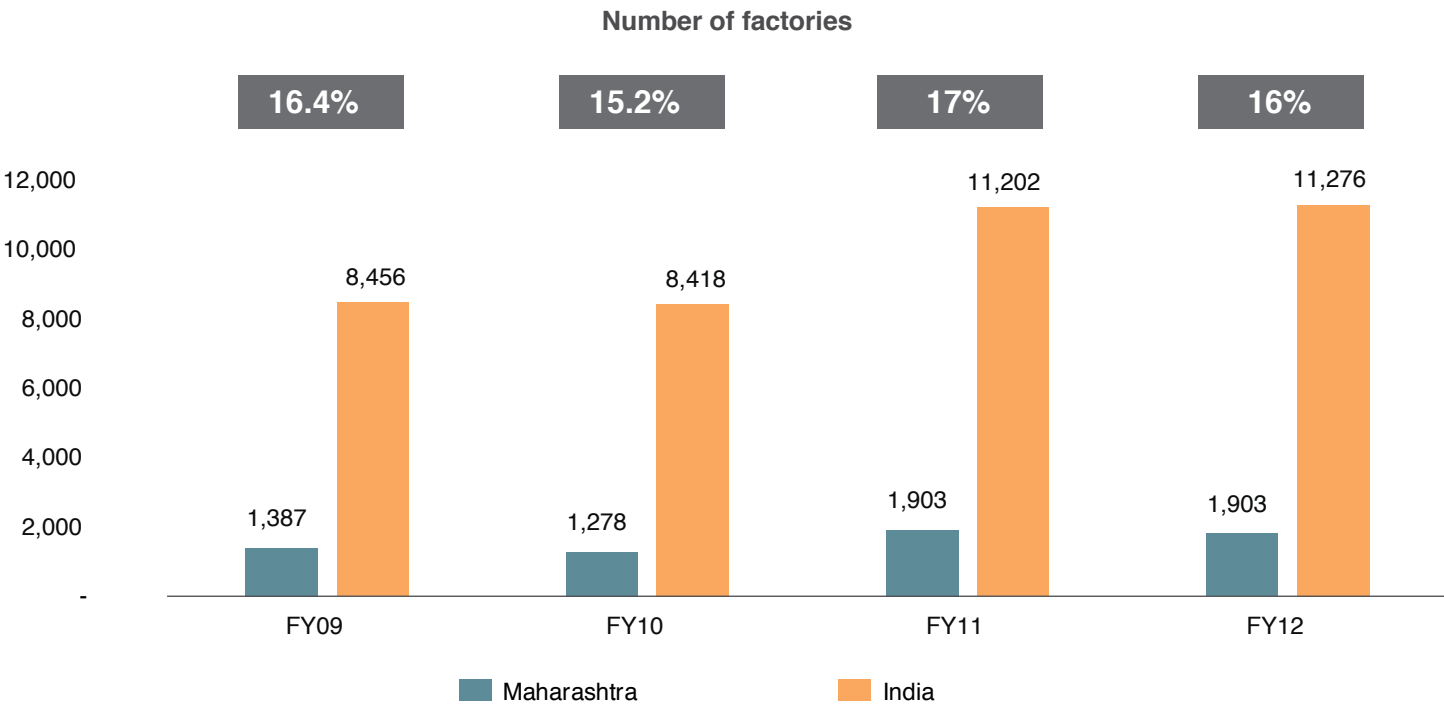
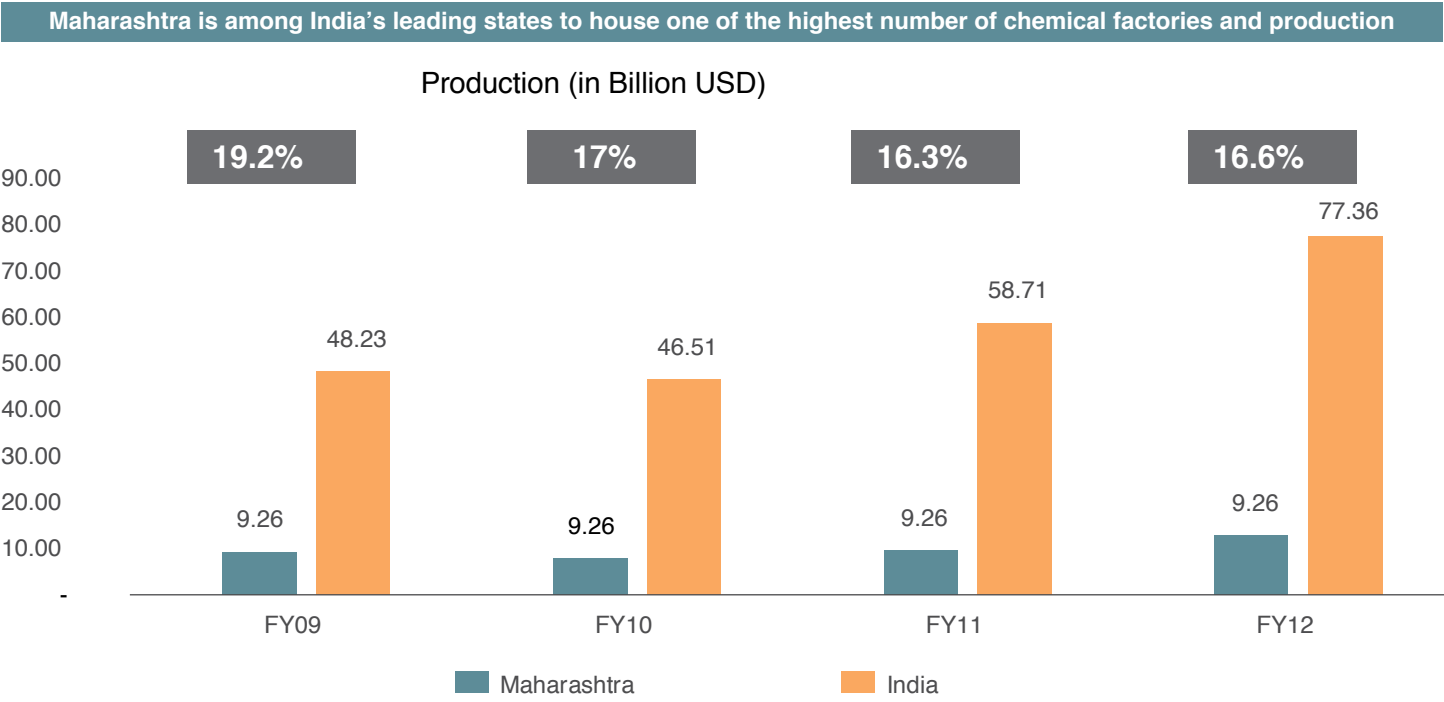


MAHARASHTRA

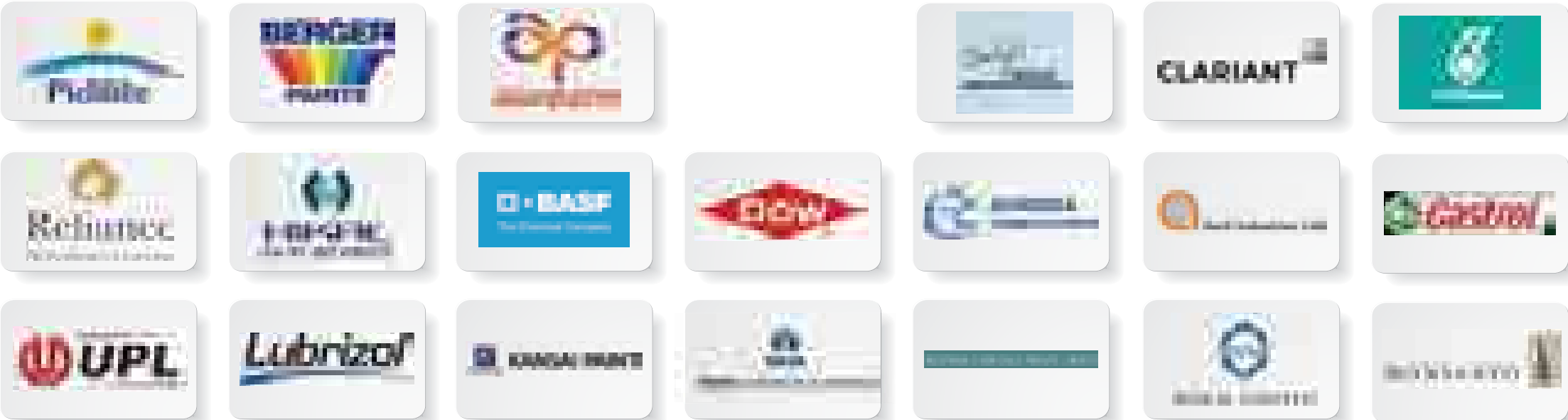
Chemical Sector



- Maharashtra is one of the leading states in India in chemical and petrochemical production
- Accounts for nearly 17 percent of chemical production in the country
- The state houses ~16 percent of the total number of chemical factories ~17 percent of chemical production in India
- Mumbai/Thane and TTC are popular chemical zones
- The state has 13 chemical zones



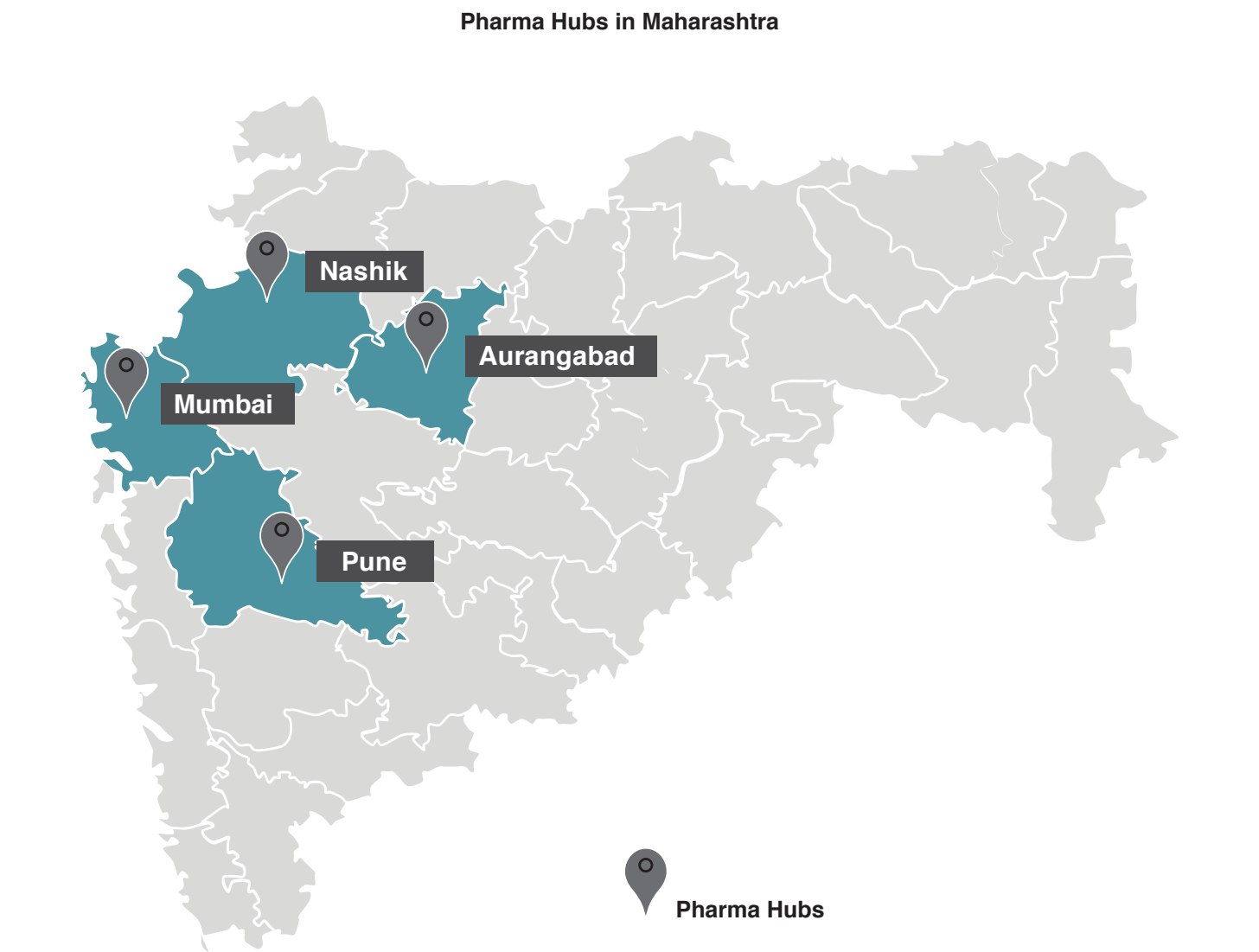
Key Industrial Players



MAHARASHTRA

Pharmaceutical Sector

- Maharashtra contributed 20 percent to India’s pharmaceutical output of 2.66 Billion USD in FY13
- The sector received a cumulative FDI inflow of 168 Million USD through 121 projects during August 1991 to March 2012
- The state has the highest number of US FDA-approved plants in India
- The highest number of pharma units
- State houses the country’s leading pharma companies
- Pune, Nashik, Aurangabad and Mumbai/Thane form the state’s pharma quadrilateral



Key Industrial Players



MAHARASHTRA

Biotechnology Sector

- More than 35% is Maharashtra’s contribution to revenue from Biotech sector in India
- Mumbai and Pune with revenues of USD 56.6 million and USD 21.9 million have made Maharashtra a leading biotech state in the country
- As of December 2014, Maharashtra housed 16 large enterprises and 50 MSMEs in the sector
- Biotech manufacturing facilities in Maharashtra are located at Thane, Navi Mumbai, and Aurangabad, among others
- Pune-based Serum institute contributes 6 percent to India’s biotech revenue

Biotech Policy

New units in Group C , D and D+ will be exempted from electricity duty for 15 years

Group A and B , 100% EU will be exempted from electricity duty for 7 years

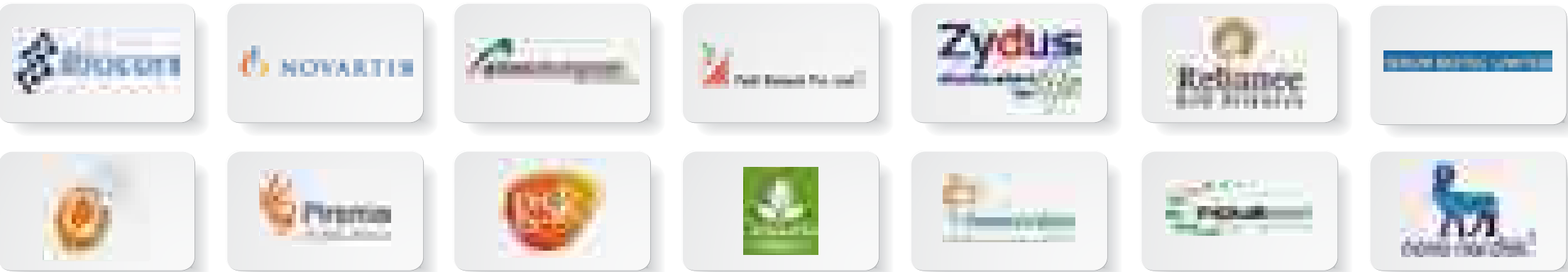
Package scheme of incentives awarded to pharmaceuticals and biotechnology units, medical and surgical appliances, cold storages

Maharashtra Scheme for Biotech provides fiscal and non-fiscal incentives under different programmes

Unit type	No. of units		Investment (US\$ million)		Employment	
	Registered	LoI	Registered	LoI	Registered	LoI
Large	16	7	185.8	88.1	712	931
MSME	50	15	43.3	29.8	872	338



Key Industrial Players



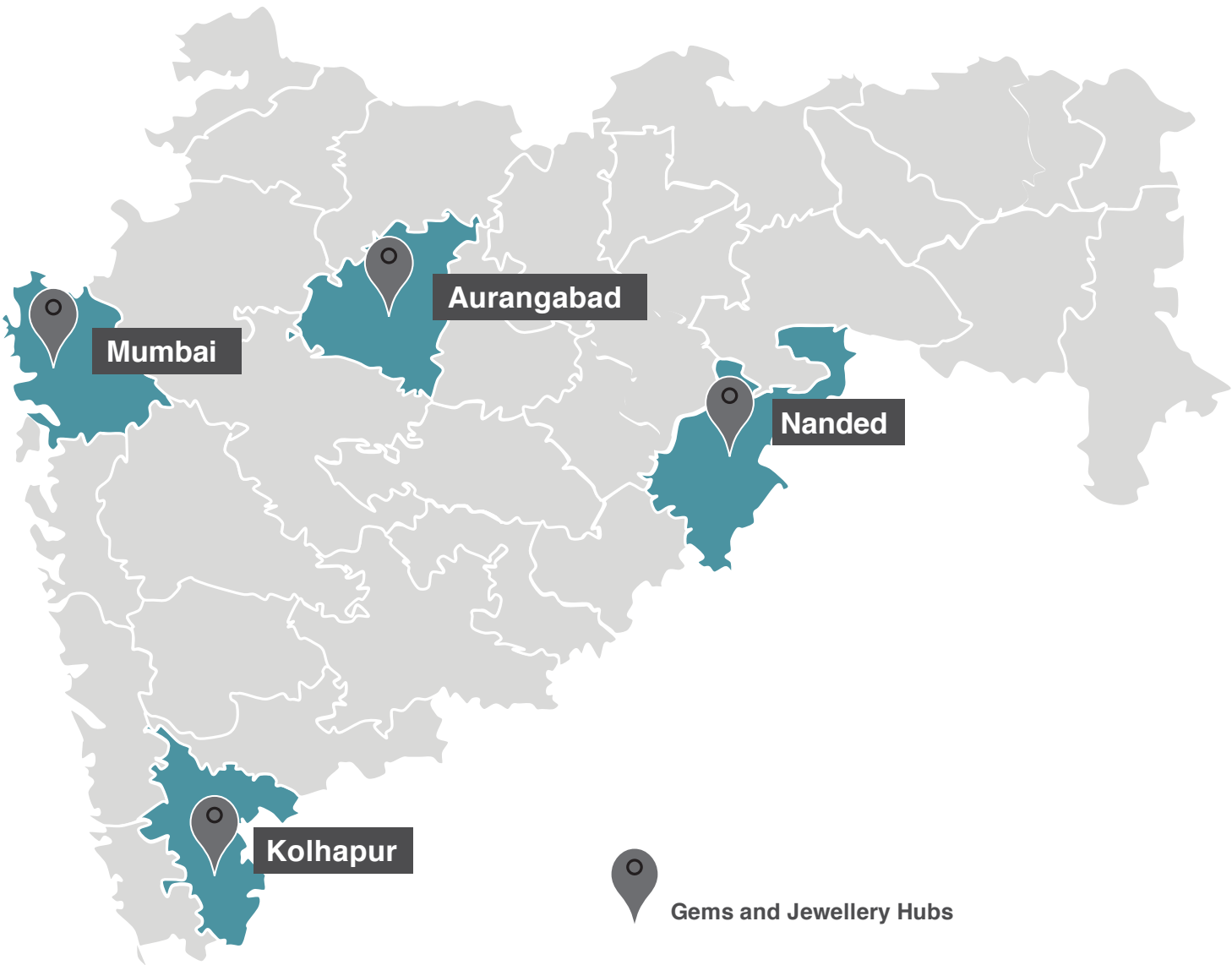
MAHARASHTRA

Gems and Jewellery Sector

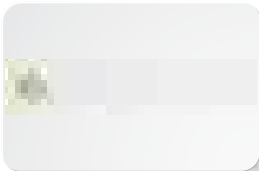
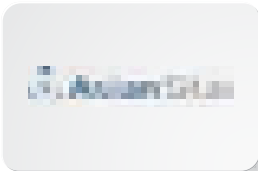
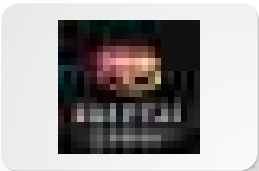
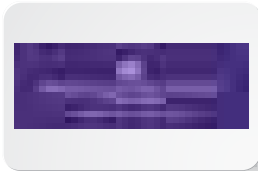
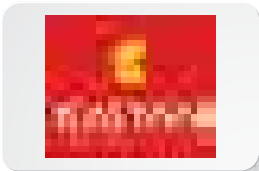
- Mumbai is India’s most important diamond cutting and polishing center
- With over 50 big diamond companies based in Mumbai it is the world’s biggest diamond cutting and polishing centre
- Gems and Jewellery Industry is considered as one of the key industries of the State
- SEEPZ SEZ has 7 standard design factories and 3 Gems and Jewellery factories
- A specialized Silver Zone at Hupri in Kolhapur for silver units



Gems and Jewellery Hubs in Maharashtra



Key Industrial Players



MAHARASHTRA

Policy Support

With focus on industrial development and investment in the State, Government of Maharashtra has issued ‘Maharashtra industrial Policy-2013’. The Industrial policy has laid emphasis on development of various sectors such as new industrial corridors, promotion of Ultra Mega / Mega projects, promotion of Large and MSMEs (Micro, Small and Medium Enterprises).



Policy & Regulatory Support

Progressive policies aimed at increasing the ‘competitive advantage’ of businesses

Fiscal Support	VAT + CST Abatement Stamp Duty Exemption Electricity Duty Exemption Plus, a host of other benefits...	Non-Fiscal Support
-----------------------	--	---------------------------

- Skill Development
- Single Window Clearance (SWC)
- Investor Facilitation
- Investor After Care Cell

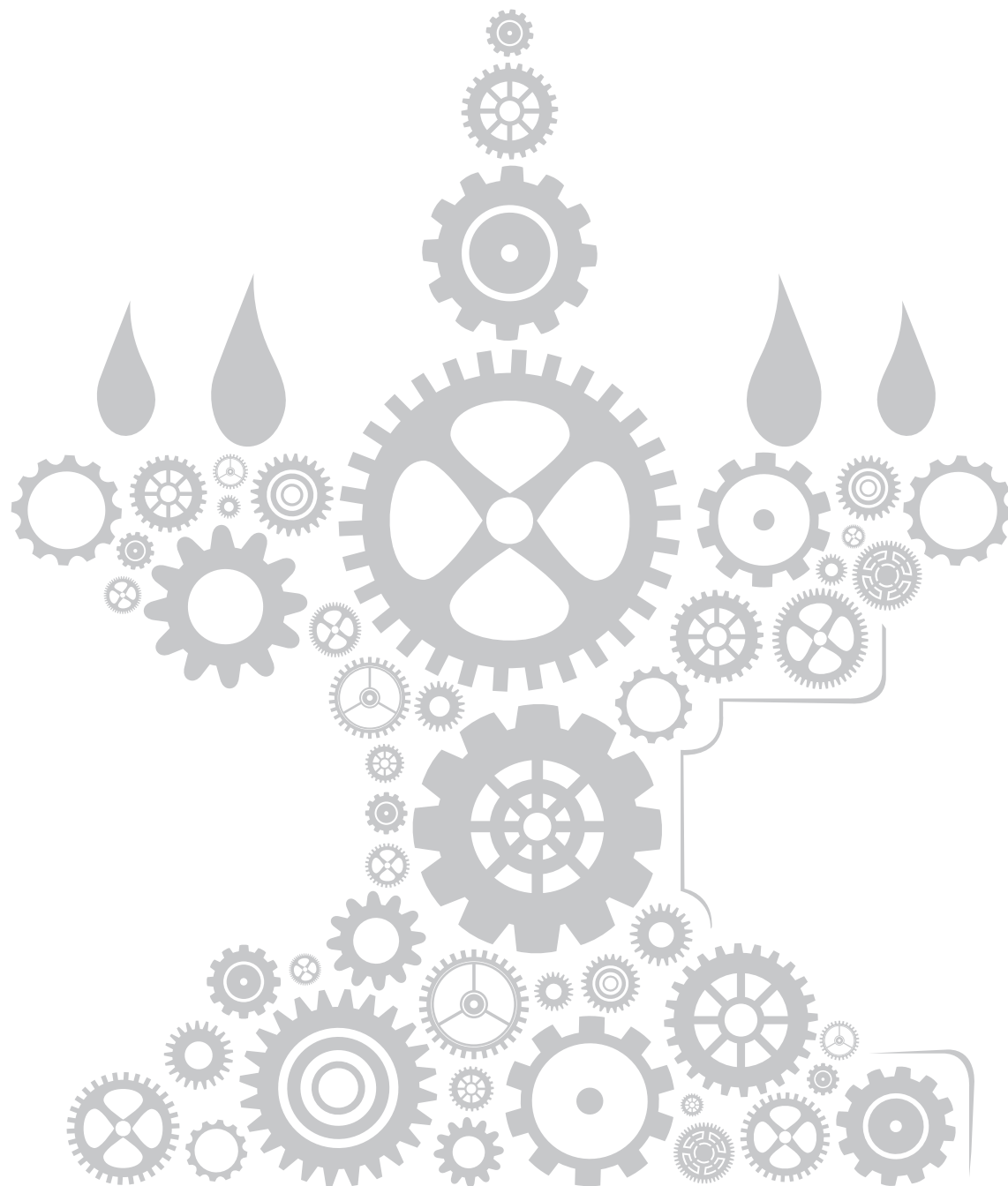
Special Incentives

Mega and Ultra Mega projects can qualify for fiscal incentives

up to **100% of the fixed capital investment**

10% additional incentive

is provided by the state if the project creates double the employment required for the eligibility



Maharashtra Industrial Development Corporation,

Udyog Sarathi, Mahakali Caves Road, Andheri (E), Mumbai - 400 093 | **Board Numbers:** 91-22-26870027/52/54/73

Fax: 91-22-26871587 | **Email:** ceo@midcindia.org | **Website:** www.midcindia.org

 @MIDC_India  MIDC  MIDC India  Maharashtra Industrial Development Corporation

Knowledge Partner 