



HARYANA

THE BREADBASKET OF INDIA

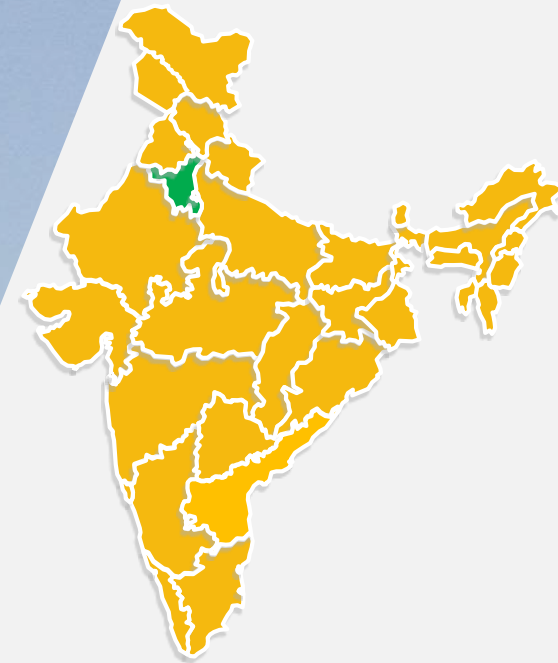
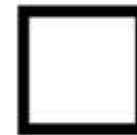


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Strong economic growth

- With an area covering 1.3 per cent of the country, Haryana contributed near 3.63 per cent to India's GDP in 2017-18. Between 2011-12 and 2019-20, the GSDP (in Rs) grew at a CAGR of 14.86 per cent.

Leading manufacturing hub

- Haryana is home to Maruti Udyog Ltd, India's largest passenger car manufacturer & Hero MotoCorp Ltd, world's largest manufacturer of two wheelers. Under 'Make in India' project, Manesar-Bawal Investment Region has been identified by the Government to be a manufacturing hub.

Leading food producer

- Haryana is the second largest contributor of food grains to India's central pool.
- The state accounted for 7.28 per cent of India's agricultural exports in 2018-19. In 2018-19, the state exported major agricultural products worth US\$ 1,366.95 million.

Growing IT sector

- Haryana is the third-largest exporter of software and one of the preferred destinations for IT/ITeS facilities in India. The software and IT export for the FY18 is expected to be US\$ 8.0 billion from Haryana.

Infrastructure support

- The state has invested in the development of world class infrastructure facilities such as special economic zones (SEZs), Kundli-Manesar-Palwal (KMP) global corridor and Delhi-Mumbai Industrial Corridor (DMIC).
- Haryana enjoys a location advantage, with nearly one-third of the state's area under the National Capital Region (NCR), a prominent trade and consumption centre.
- Haryana was ranked third best state in the country ease of doing business in the Business Reforms Action Plan 2017.

Note: GSDP – Gross State Domestic Product, 2018-19

Source: Directorate of Economics & Statistics of Haryana, Central Statistics Office, Economic Survey of Haryana 2017-18, APEDA

INTRODUCTION



- Haryana is surrounded by Uttar Pradesh in the east, Punjab in the west, Himachal Pradesh in the north and Rajasthan in the south. The state surrounds the national capital city, New Delhi, from three sides.
- The most commonly spoken languages are Hindi and Punjabi. English is the medium of education in most schools.
- Gurgaon, Faridabad, Karnal, Ambala, Panipat & Kurukshetra are some of the key districts of the state.
- The state has three major seasons, viz. summer (April-June), monsoon (July-September) and winter (October-March).



Parameters	Haryana
Capital	Chandigarh
Geographical area (sq km)	44,212
Administrative districts (No)	22
Population density (persons per sq km)	573
Total population (million)	25.4
Male population (million)	13.5
Female population (million)	11.9
Sex ratio (females per 1,000 males)	879
Literacy rate (%)	75.5

Source: Economic Survey of Haryana, Census 2011

Leading business hub

- Haryana is one of the leading states in terms of industrial production, especially passenger cars, two-wheelers, mobile cranes & tractors. The Gurgaon-Manesar-Bawal belt is the auto hub of India.
- Haryana has emerged as a base for the knowledge industry, including IT & biotechnology. Many large Indian & multinational companies have set up offices in the state due to its high-quality infrastructure and proximity to Delhi.

Attractive investment avenues

- Haryana has emerged as a manufacturing hub, with immense scope for development of micro, small & medium enterprises (MSMEs) sector. The state adopted a cluster-based development approach to promote industries such as IT, textiles, food & handloom.
- The state's real estate market is attractive and it is a preferred automotive hub. Of the total 250 large & medium OEMs, about 50 are located in Haryana.

Advantage Haryana

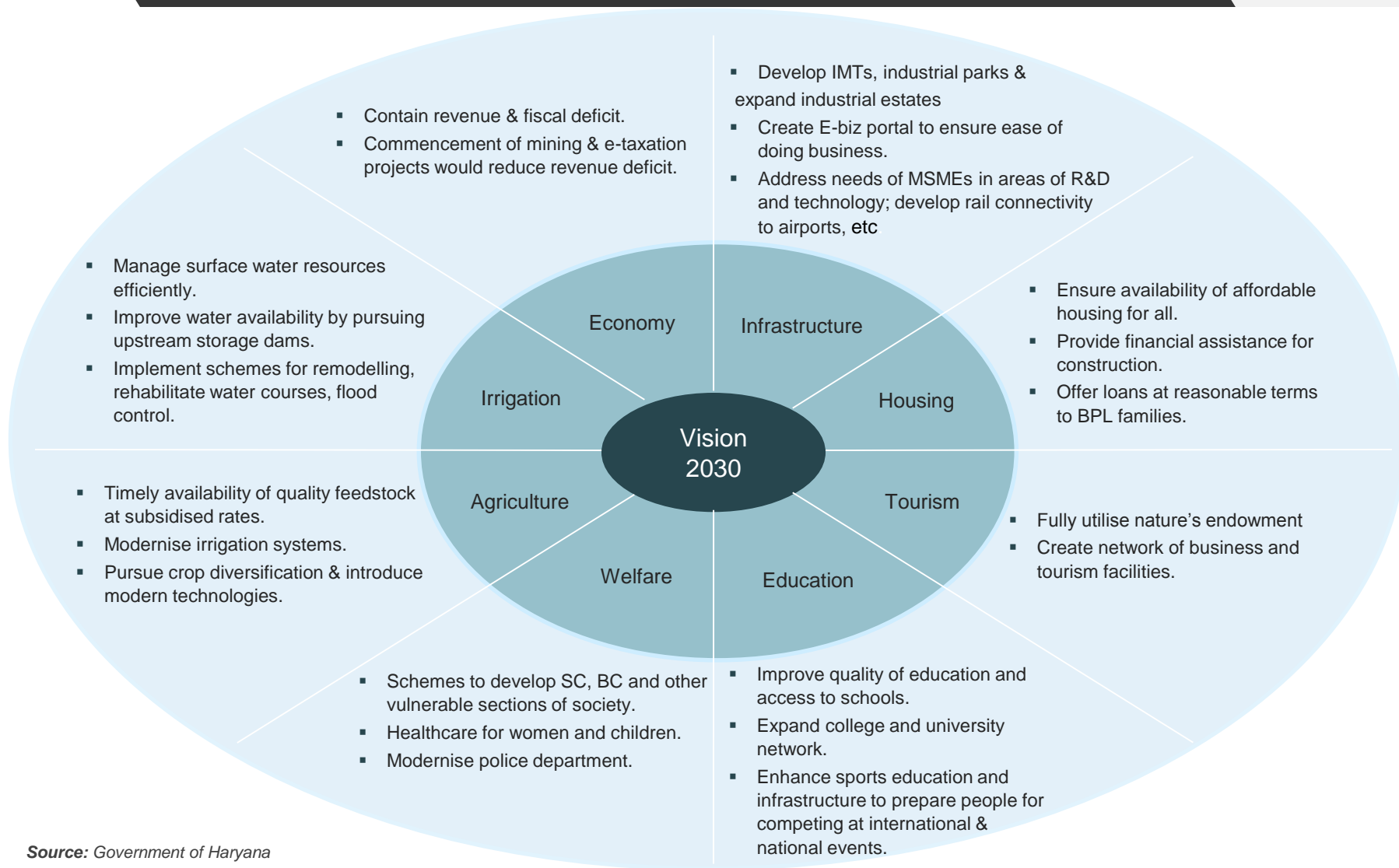
Rich labour pool

- Haryana has a large base of skilled labour, making it an ideal destination for knowledge-based & manufacturing sectors. It also has a large pool for support services.
- The state has set up various national level institutions such as Indian Institute of Management (IIM), Indian Institute of Corporate Affairs (IICA), Central Institute for Plastics Engineering & Technology (CIPET) & National Institute of Food Technology & Entrepreneurship & Management (NIFTEM).

Policy & infrastructure support

- With a stable political environment, successive governments have been committed to creating a progressive environment.
- The state offers a wide range of fiscal & policy incentives for businesses under the Industrial & Investment Policy, 2011. It also has sector-specific policies, particularly for IT & tourism.
- It has well developed infrastructure like power, roads and railways. For trade promotion, the state has planned several projects.

Note: GSDP – Gross State Domestic Product, exchange rate used is average of 2017-18 i.e. USD = INR 64.45, OEM – Original Equipment Manufacturer



Source: Government of Haryana

Haryana's Contribution to Indian Economy (2018-19)

Parameter	Haryana	India
GSDP as a percentage of all states' GSDP	3.32	100.0
GSDP growth rate (%)	12.59	12.3
Per capita GSDP (US\$)*	2,975.29	1,750.29

Social Indicators

Parameter	Haryana	India
Literacy rate (%)	75.6	74.0
Birth rate (per 1,000 population) (2017)	20.7	20.4

Industrial Infrastructure

Parameter	Haryana	India
Operational PPP projects (No) (as of December 2019)	28	1824
Exporting SEZs (November 2019)	7	238

Physical Infrastructure in Haryana

Parameter	Haryana	India
Installed power capacity (MW) (November 2019)	11,384.02	364,960.14
Wireless subscribers (mn) (as of Sept 2019)	28.25	1173.75
Internet subscribers (mn) (as of June 2019)	15.36	665.31
National highway length (km) (November 2019)	3,166	132,499
Airports (No)	1	129

Investments (US\$ billion)

Parameter	Haryana	India
Cumulative FDI equity inflows ¹ between April 2000-June 2019	89.68	436.47

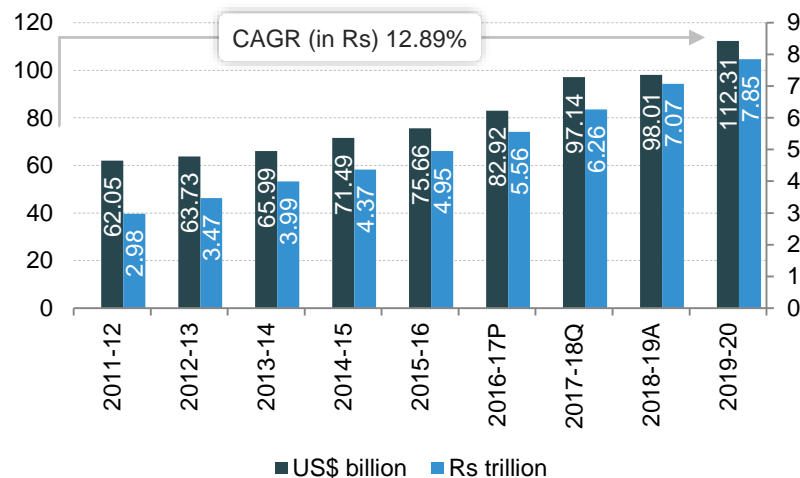
Note: GSDP, per capita GSDP figures are for 2018-19 taken at current prices, exchange rates used is average of 2018-19 i.e. 72.15, For source refer to Annexure, ¹Includes Delhi, part of UP, * Per capita GSDP data is for 2017-18

Source: Economic Survey of Haryana 2018-19

ECONOMIC SNAPSHOT

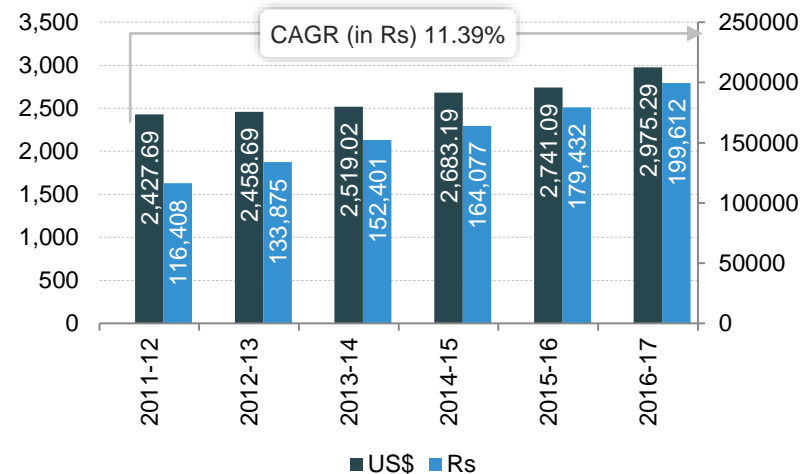


GSDP of Haryana at Current Prices



- At current prices, the total GSDP of Haryana reached Rs 7.85 trillion (US\$ 112.31 billion) in 2019-20.
- The state's GSDP increased at a Compound Annual Growth Rate (CAGR) (in Rs) of 12.16 per cent between 2011-12 and 2018-19(A).

Per Capita GSDP of Haryana at Current Prices

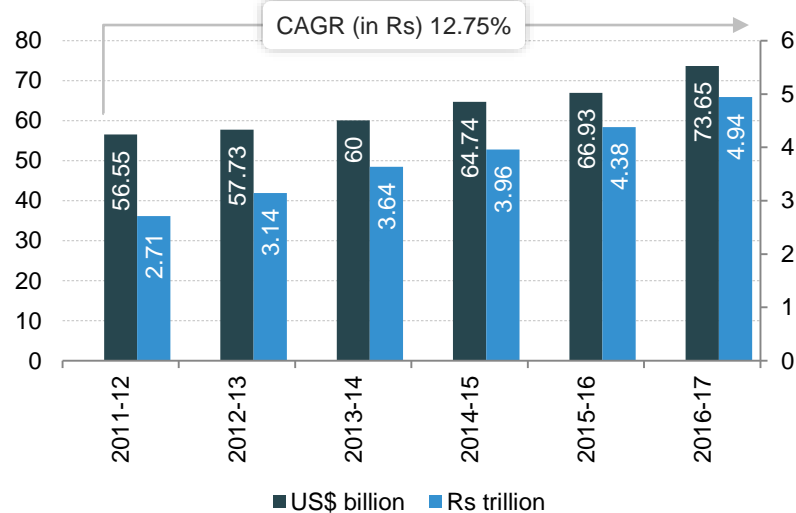


- The state's per capita GSDP in 2016-17 (P) was Rs 199,612 (US\$ 2,975.29).
- The per capita GSDP (in Rs) increased at a CAGR of 11.39 per cent between 2011-12 and 2016-17.

Note: exchange rates used are averages of each year, P- provisional, Q – quick estimates, A – advanced estimates,

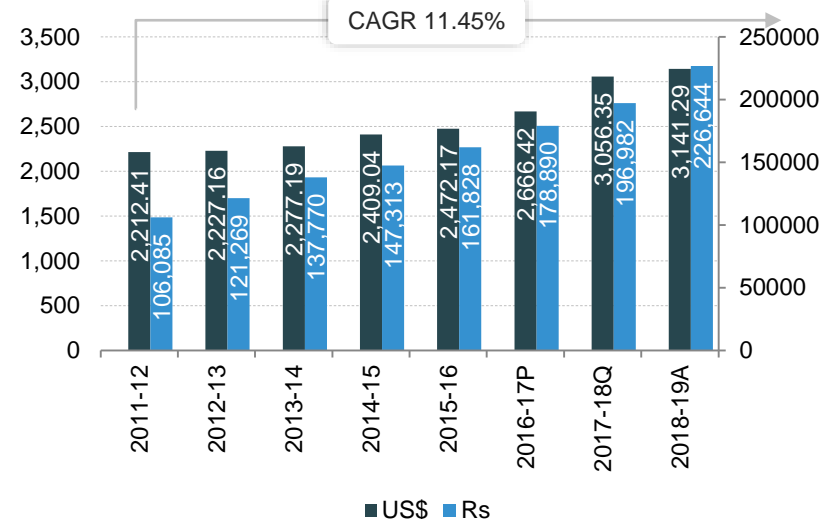
Source: Directorate of Economics & Statistics of Haryana, MOSPI, Economic Survey of Haryana 2018-19

NSDP of Haryana at Current Prices



- At current prices, the Net State Domestic Product (NSDP) of Haryana was about Rs 4.94 trillion (US\$ 73.65 billion) in 2016-17.
- The state's NSDP (in Rs) expanded at a CAGR of 12.75 per cent between 2011-12 and 2016-17.

NSDP per capita of Haryana at Constant Prices*



- The state's per capita NSDP in 2018-19 (A) reached Rs 2,26,644 (US\$ 3,141.29), one of the highest in all Indian states.
- Per capita NSDP (in Rs) increased at an average rate of 11.45 per cent between 2011-12 and 2018-19 (A).

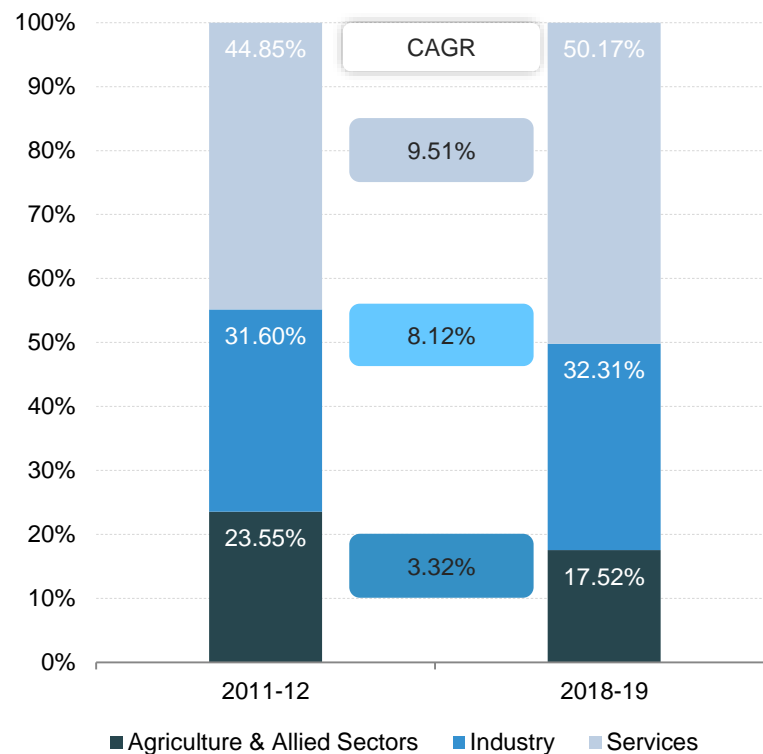
Note: exchange rates used are averages of each year, P- provisional, Q – quick estimates, A – advanced estimates, updated data expected in 2019, * - Since current prices estimates is not available we have taken the constant prices

Source: Directorate of Economics & Statistics of Haryana, MOSPI, Economic Survey of Haryana 2018-19

ECONOMIC SNAPSHOT – PERCENTAGE DISTRIBUTION OF GSVA

- Services sector at constant (2011-12) prices, was the largest contributor to Haryana’s Gross State Value Added (GSVA) in 2018-19 (A) with a share of 50.17 per cent. The sector has grown at a CAGR of 9.51 per cent between 2011-12 and 2018-19 (A).
- Industry sector contributed 32.31 per cent to the state’s GSVA in 2018-19 (A) at constant (2011-12) prices. The sector has grown at a CAGR of 8.12 per cent between 2011-12 and 2018-19 (A).
- The agriculture & allied sector contributed 17.52 per cent to the GSVA in 2018-19 at constant (2011-12) prices and grew at a CAGR of 3.32 per cent between 2011-12 and 2018-19 (A).

GSVA Composition by Sector at Current (2011-12) Prices

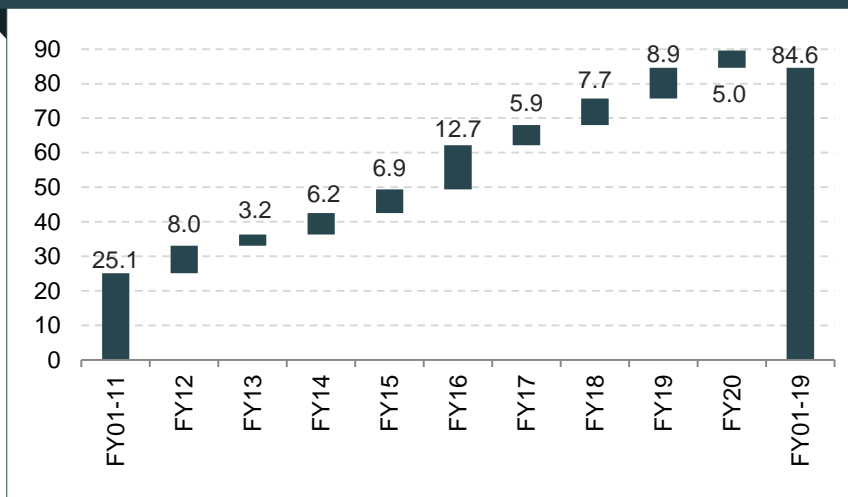


Note: A – advanced estimates

Source: Economic Survey of Haryana 2018-19

ECONOMIC SNAPSHOT – FDI INFLOWS & INVESTMENTS

FDI Inflows in Haryana¹ in April 2000-June 2019 (US\$ billion)



Proposed Investments

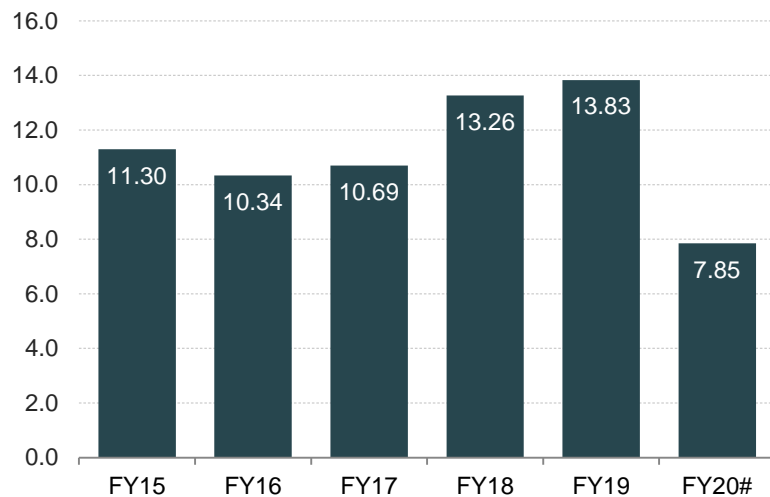
Year	IEMs filed	Proposed investments (in US\$ million)
2015	75	434.13
2016	58	326
2017	44	381.37
2018	75	356.70
2019 (up to October 2019)	68	573.62

- According to the Department of Industrial Policy & Promotion (DIPP), cumulative foreign direct investment (FDI) inflows in Haryana¹ from April 2000 to June 2019 stood at US\$ 89.6 billion.
- The services sector accounted for a major share in FDI followed by real estate & electricity.
- In May 2018, Government of Haryana signed 10 memoranda of understanding (MoUs) with UK for various projects requiring investment of around Rs 1,500 crore (US\$ 232.74 million).
- Between FY15-18, Haryana has witnessed investments of around Rs 80,000 crore (US\$ 11.93 billion)(up to December 2018).

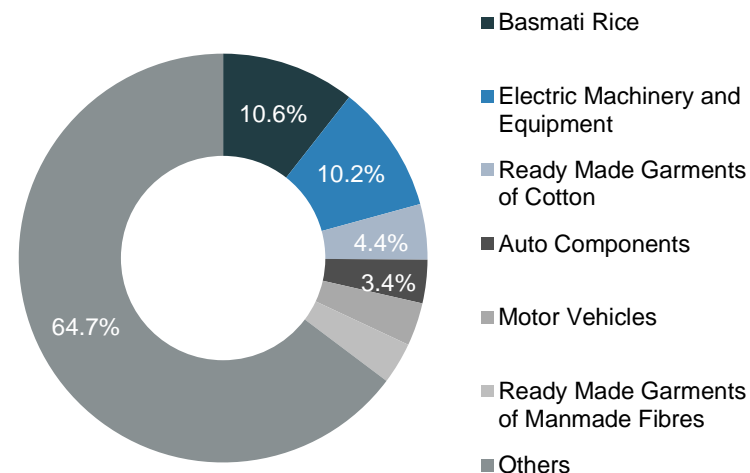
Note: ¹Includes Delhi, part of UP, IEM - Industrial Entrepreneurs' Memorandum

*Source: Department Of Industrial Policy & Promotion, *Minister of Industries and Commerce, Haryana*

Merchandise Exports from Haryana (US\$ billion)



Major Commodities Exported in FY19



- The setting up of SEZs in sectors like IT/ITeS, biotechnology, handicrafts, etc. has helped increase exports in the state.
- Merchandise exports from Haryana reached US\$ 13.26 billion in FY18 and US\$ 13.83 billion in FY19. The software and IT export for the FY18 is expected to be US\$ 8 billion from Haryana.
- Haryana is amongst the biggest producers of food grains in India. More than 60 percent export of Basmati Rice from India is taking place from Haryana alone.

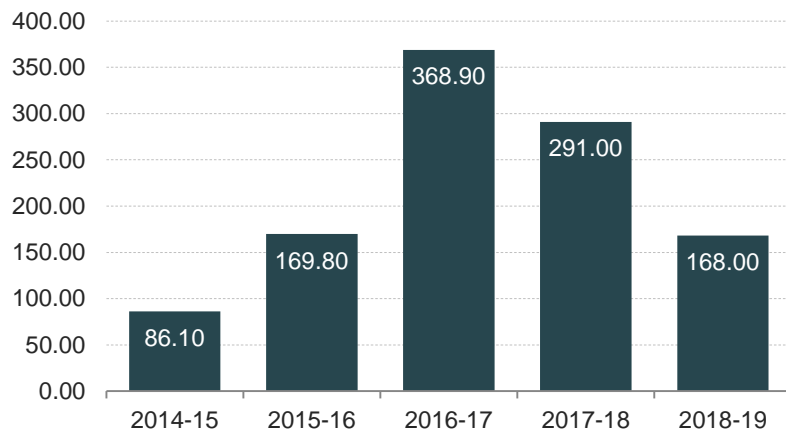
Note: #- till November 2019

Source: DGCIS Analytics, Economic Survey of Haryana 2018-19

PHYSICAL INFRASTRUCTURE



National highway length completed (km)



Road Network in Haryana as of March 2019

Type	Length (km)
National Highways	3,166
State Highways	1,801
Major District Roads	1,395
Other District Roads	20,700

- A new National Highway, NH-152D, with a length of 230 km will be constructed from Kurukshetra district to Mahendragarh district in Haryana at a cost of Rs 5,108 crore (US\$ 707.97 billion).
- As of November 2018, the state had a road network of 26,431 km. During 2018-19, 168 km of national highways were constructed in the state.
- Haryana is among the states having almost 100 per cent connectivity to rural areas with metalled roads. Haryana Roadways, with its fleet of nearly 4,215 buses, is one of India's biggest state road transport undertakings which operate across 12.70 lakh km everyday.
- Under State Budget 2018-19, 4.73 per cent of the total expenditure was allocated to roads & bridges. The Kundli-Manesar-Palwal (KMP) Expressway was inaugurated in November 2018.

Source: Economic Survey of Haryana 2018-19, Ministry of Road Transport & Highways, Government of India, News articles, NHAI, Lok Sabha

- Haryana has a 1,710.49 km long rail route. Kalka, Kurukshetra, Rohtak, Jind, Hisar, Ambala, Panipat, Gurgaon & Jakhal are some of the important railway stations. There is a railway workshop at Jagadhari.
- Government of Haryana has formed a joint venture with the Indian Railways named 'Haryana Rail Infrastructure Development Corporation Limited (HRIDC)' to undertake railway projects in the state.
- As per State Budget 2018-19, work on elevation of Rohtak-Gohana-Panipat line and Rohtak-Meham-Hansi railway lines are in progress.
- A new high speed rail network between Delhi and Haryana was approved in June 2018 with work on it expected to be started by March 2019. The Escorts Mujesar-Ballabgarh section of the Violet Line Metro was launched in November 2018, further improving the rapid transport connectivity in the state.

Rail network across the state



Source: Economic Survey of Haryana, State Budget 2018-19, 2017-18, Maps of India

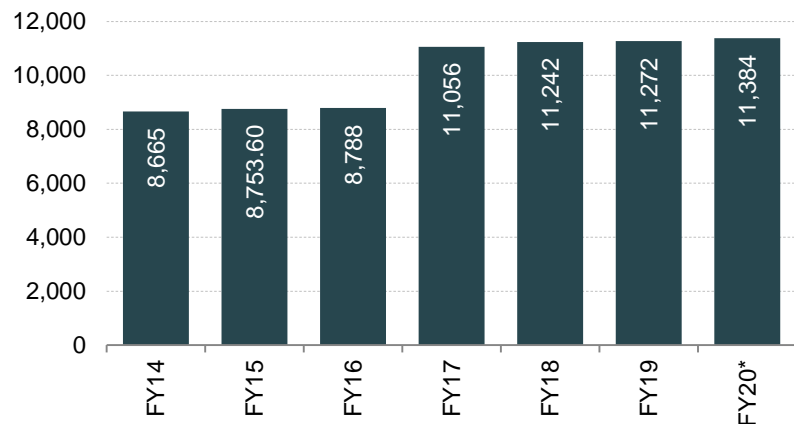
PHYSICAL INFRASTRUCTURE – AIRPORTS

- There is a domestic airport at Chandigarh and civil aerodromes at Pinjore, Karnal, Hissar, Bhiwani and Narnaul. The state has a total of eight airports, which includes both operational and non-operational airports.
- In September 2015, a new terminal at Chandigarh airport was inaugurated. The terminal is capable of handling both domestic and international flights. The cost incurred in the construction of the airport by AAI is US\$ 155.77 million. A stake of 51 per cent was taken by the AAI and shares of 24.5 per cent each were held by the state's of Punjab and Haryana.
- Hisar civil aerodrome will be upgraded into an international airport. Under the first phase of construction, the aerodome would be converted into a domestic airport. The airport will also be covered under the regional connectivity scheme of UDAAN. Domestic flights from the Hisar airport are expected to begin from November 2018.
- Under State Budget 2018-19, Rs 201.27 crore (US\$ 31.23 million) was allocated for civil aviation.
- The Chandigarh airport handled 2,137,739 passengers, 5,650 metric tonnes of freight and saw 18,715 aircraft movements in 2017-18.

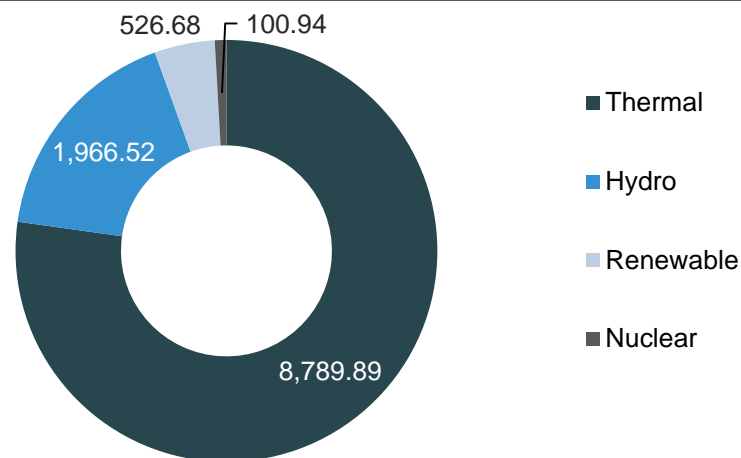
Domestic airport	Passengers			Aircraft movement			Freight (MT)		
	2017-18	2018-19	Apr-Oct 2019	2017-18	2018-19	Apr-Oct 2019	2017-18	2018-19	Apr-Oct 2019
Chandigarh	2,137,739	2,097,698	13,90,595	18,715	17,003	10,303	5,650	5,051	5,558

Source: Airports Authority of India, State Budget 2018-19, 2017-18, 2016-17

Installed Power Capacity (MW)



Classification of Installed Power Capacity* (MW)



- As of November 2019, Haryana had a total installed power generation capacity of 11,384 MW; of which, 4,733.16 MW by the private sector, 3,139.30 MW was contributed by the state and 3,511.56 MW by the central sector.
- Energy requirement in Haryana in Apr-Sept 2019 was 37,036 million units.
- Peak demand in the state for 2019-20 (up to Sept 2019) reached 11,001 MW.
- Under State Budget 2019-20, Rs 12,988.61 crore (US\$ 1.86 billion) for Power Department and Rs 475.91 crore (US\$ 68 million) for Department of New and Renewable Energy.
- Between 2015-17, 73 sub-stations have been established to strengthen the transmission and distribution system in the state.

Note: GWH – Giga Watt Hours, * - Till November 2019

Source: Central Electricity Authority, Annual Budget 2019-20, Economic Survey of Haryana 2018-19

Telecom Infrastructure (As of September 2019)

Wireless subscribers	28,256,033
Wireline subscribers	260,998
Internet subscribers(as of June 2019) (mn)	15.36
Tele density (%)	98.85

Performance of Bharat Net

Optical Fiber Cable laid (up to December 02, 2018)	12,013
Service Ready GPs (as of November 11, 2019)	6,188

- According to the Telecom Regulatory Authority of India (TRAI), Haryana had 28.25 million wireless subscribers and 260,998 wireline subscribers, as of September 2019. The number of internet subscribers in the state as of June 2019 stood at 15.36 million.
- By the end of September 2019, 16.70 million subscribers had submitted requests for mobile number portability in Haryana.
- The state of Haryana had a tele-density of 98.85 per cent as of September 2019.
- In consultation with telecom power companies, Haryana government has rolled out a new Communication and Connectivity Policy to provide a major push to telecom and communication infrastructure in the state.
- As of of November 11, 2019, there were 6,188 service ready gram panchayats in the state, connected through optical fibre under the Bharat Net.

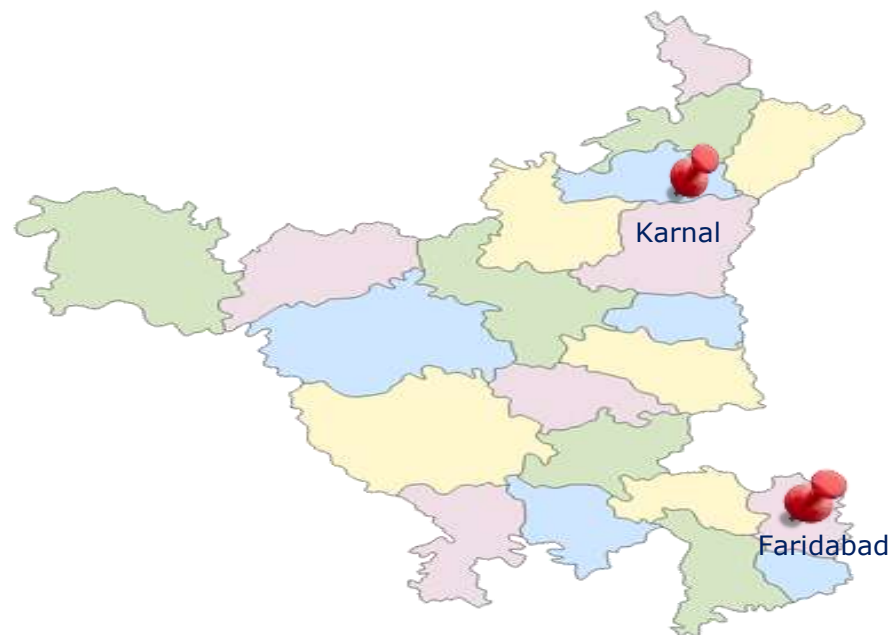
Note: GP-Gram Panchayat

Source: Telecom Regulatory Authority of India; Department of Telecommunications- Ministry of Communications & Information Technology, India Post

- The state government has provided an impetus & would continue to the financial status of urban local bodies & provide adequate funds for improving civic amenities in urban areas. There are 77 urban local bodies in the state, consisting of 9 municipal corporations, 19 municipal councils & 50 municipal committees.
- Under State-Budget 2019-20, Rs 3,994.95 crore (US\$ 571.61 million) has been allocated for urban development.
- Under the State-Budget 2019-20, government has allocated Rs 400 crore (US\$ 57.23 million) for the development of smart cities and AMRUT missions.
- Swachh Bharat Mission (Urban) has been implemented in all 80 statutory towns & cities in Haryana. The state has been declared Open Defecation Free.
- The Haryana Roadways had 3,944 buses operational as of November 2018, servicing 105 bus stops in the state.
- The state's 20 cities & towns are included in the AMRUT Mission. As of January 2019, Rs 2,565.74 crore (US\$ 398.1 million) has been allocated to cities in Haryana under the AMRUT scheme.

Smart cities in Haryana

Cities	Population	Area (sq. km)	Literacy rate
Faridabad	1,809,733	741	81.70%
Karnal	1,505,324	1,967	74.73%



Source: JNNURM, Ministry of Urban Development, Directorate of Urban Local Bodies-Haryana, Economic Survey, Transport Department, Economic Survey of Haryana 2018-19

SOCIAL INFRASTRUCTURE



Higher Education Statistics (2018-19)

Universities	48
Colleges	1038
Gross Enrolment Ratio	28.7
Pupil teacher Ratio	26

School Education Statistics

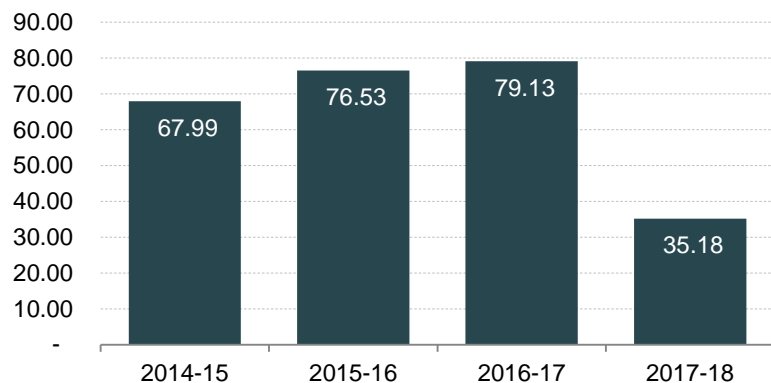
Primary Schools (Government + Private)	8,747 + 1,214
Middle Schools (Government + Private)	2,433 + 3,095
High Schools (Government + Private)	1,215 + 2,007
Senior Secondary Schools (Government + Private)	2,056 + 2,730
Pupil Teacher Ratio*	18

- The state has a strong primary education infrastructure, with a primary school located within a 1.03 km radius of each village and a middle school within a 1.07 km radius.
- Under the State Budget 2019-20, Rs 6,101 crore (US\$ 872.9 million) and Rs 3,389 crore (US\$ 484.90 million) has been allocated by government for the growth of government primary and secondary schools.
- As of October 2018, Haryana had 9,961 primary schools, 5,528 middle schools, 3,222 high schools and 4,786 senior secondary schools in operation.
- For higher education, there are 48 universities and 1038 colleges operational in the state as per All India Survey on Higher Education 2018-19.

Note: * 2016-17

Source: Haryana at A Glance, Unified District Information System for Education, AISHE 2018-189, Saksham Haryana Education Portal

Allocation under National Health Mission (US\$ million)(up to December 2017



Health indicators (2017)

Birth rate ¹	20.5
Death rate ¹	5.9
Infant mortality rate ³	33

- As per state's Economic Survey 2017-18, the state government is providing services through 60 hospitals, 124 Community Health Centres, 500 Primary Health Centres and 2,630 Sub-Health Centres.
- According to the State Budget 2019-20, for the development of hospitals and dispensaries government has allocated Rs 1,094 crore (US\$ 156.53 million) and Rs 995 crore (US\$ 142.36 million) for primary health centres in rural areas.
- Under 'Mukhya Mantri Muft Ilaj Yojana' seven types of medical services are being provided for free in Haryana.
- Further, the state government has also decided to set up an AYUSH University as well as AYUSH Cell across every PHC of the state.

Note: ¹Per thousand persons, ²Per thousand live births, Exchange rate used is average of 2017-18 i.e. USD = INR 64.45

Source: Annual Budget, Sample Registration System (SRS) Bulletin, Haryana

INDUSTRIAL INFRASTRUCTURE



- Historically an agrarian state, Haryana today is a well-developed industrial state. HSIIDC is the state's premier industrial promotion agency. It is responsible for providing reliable and efficient facilities to entrepreneurs investing in the state.
- HSIIDC has developed a number of industrial estates, industrial model townships and specialised parks for industrial cluster development.
- As of November 2019, the state had seven exporting Special Economic Zones.
- The government is developing sector specific theme parks and sub-cities along the Kundli-Manesar-Palwal (KMP) expressway. The 135-km KMP expressway will act as a Delhi bypass and provide seamless connectivity across NH-1, NH-2, NH-8 and NH-10. Total cost of the project is US\$ 414.73 million.

Mega-projects of Haryana

- Kundli-Manesar-Palwal (KMP) Expressway on Build-Operate-Transfer (BOT) basis
- Delhi-Mumbai Industrial Corridor (DMIC) Project
- Manesar Bawal Investment Region (MBIR)
- Early Bird Projects (Global City Project, Integrated Multimodal Logistics Hub (IMLH), Mass Rapid Transit System Between Gurgaon-Manesar-Bawal (MRTS))

Source: Ministry of Commerce & Industry, Government of India, HSIIDC

INDUSTRIAL INFRASTRUCTURE... (2/3) – INDUSTRIAL ESTATES

Estate/location	Brief Description
IMT Manesar (Phase I is complete, Phases II, III, IV and V are undergoing development)	<ul style="list-style-type: none"> ▪ Located at a distance of 50 km from Delhi on NH-8 & about 32 km from the IGI Airport. ▪ Focus on hi-tech and hi-precision non-polluting units such as automotive, readymade garments, ITeS and packaging.
IIDC, Saha (Status- Planned & Developed)	<ul style="list-style-type: none"> ▪ Located on NH-10, about 250 km from New Delhi. ▪ HSIIDC acquired around 76 acres of land for setting up IIDC in Saha.
Udyog Vihar, Gurgaon	<ul style="list-style-type: none"> ▪ Located on NH-8, about 8 km from IGI. ▪ Focus on IT/ITeS, electronics, electrical goods, pharmaceuticals, light engineering, auto parts and components and readymade garment sectors. ▪ Maruti Udyog, a leading car manufacturer of India, has its base in Udyog Vihar.
Kundli Phases I, II, IV, EPIP and Electronic Hardware Technology Park (Status - Planned & Developed)	<ul style="list-style-type: none"> ▪ Located on NH-1 on the Delhi-Haryana border, about 20 km from Delhi. ▪ Has industrial units from general engineering, cycle parts, dairy products & agro-based sectors.
Faridabad	<ul style="list-style-type: none"> ▪ Located about 35 km from New Delhi, on the Delhi-Mathura highway. ▪ Has industrial units for the light engineering sector.
Murthal	<ul style="list-style-type: none"> ▪ Located about 50 km from New Delhi, on NH-1. ▪ Has industrial units from general engineering, malt, chemicals & cycle parts sectors.
Panipat (Status - Fully Developed)	<ul style="list-style-type: none"> ▪ Located about 89 km from New Delhi, on NH-1. ▪ It covers 922 acres of area and is a well-equipped facility with an internal road network & electric distribution system.

Source: HSIIDC website

INDUSTRIAL INFRASTRUCTURE... (3/3) – INDUSTRIAL ESTATES

Estate/location	Brief Description
Ambala	<ul style="list-style-type: none"> ▪ Located about 200 km from New Delhi, on NH-1. ▪ Has industrial units from scientific instruments, electronic and light engineering sectors. ▪ It also has a United Nations Development Programme (UNDP) assisted instrument design and development centre.
Tohana (Status- Planned & Developed)	<ul style="list-style-type: none"> ▪ Located about 200 km from New Delhi. ▪ Has industrial units from agriculture implements, foundry and light engineering sectors.
Jind	<ul style="list-style-type: none"> ▪ Located about 120 km from New Delhi. ▪ Has agro-based industries, leather based products and chemical industries.
Samalkha (Status- Planned & Developed)	<ul style="list-style-type: none"> ▪ Located about 70 km from New Delhi on NH-1. ▪ Has light engineering and foundry units.
Rai (Status- Planned & Developed)	<ul style="list-style-type: none"> ▪ Located about 35 km from New Delhi on NH-1. ▪ A food park and a technology park have been developed here.
Barwala (Phase-I Completed and Phase-II under-construction)	<ul style="list-style-type: none"> ▪ Located at about 240 km from New Delhi, Panchkula-Saha State Highway, in District Panchkula ▪ Has industrial units of plywood, pharmaceuticals units and light engineering works.
<p>Other industrial estates under implementation are ancillary estates at Panchkula, Kalka, Murthal, integrated infrastructure development centre at Sirsa, built-up sheds near Sohna, and estates at Manakpur in Yamuna Nagar.</p>	

Source: HSIIDC website

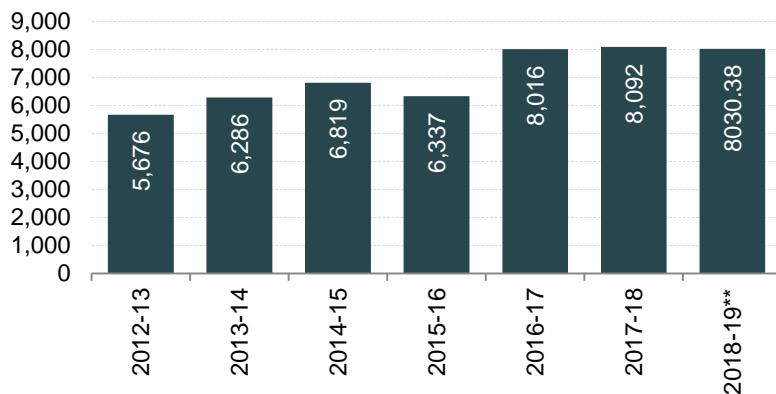
KEY SECTORS

- ❖ Agriculture and Allied Industries
- ❖ Automotives
- ❖ IT & ITeS
- ❖ Textiles



KEY SECTOR – AGRICULTURAL AND ALLIED INDUSTRIES... (1/2)

Haryana's Total Horticulture Production ('000 MT)



Agricultural Production (2018-19*)

Crop	Area ('000 hectares)	Yield (kgs/hectare)	Annual production ('000 Tonnes)
Rice	1,422	3,432	4,299.3 ^{^^}
Kharif Pulses	20	739	15
Wheat	2,526	4,624	11,162.4 [^]
Rabi Pules	10	1,200	12
Sugarcane	114	76,359	10,893.5 ^{^^}
Cotton (lint)	669	413	1,626
Oilseeds	605	1,626	13.0 ^{^^}

- Agriculture is one of the biggest employment generators in rural Haryana, with strong potential in value addition & exports. Haryana is self-sufficient in food production and the second largest contributor of food grains to the central pool. The Department of Horticulture encourages a cluster approach for the development of fruit cultivation. Wheat, sugarcane, rice, cotton, rapeseed and mustard are key agricultural products of the state. In 2018-19, the state exported major agricultural products worth US\$ 1.3 billion and worth US\$ 520.82 million between Apr-Sept 2019.
- Krishi Kiosk online service for farmers was launched in June'19 which will provide information about government current and upcoming schemes also help them to file claim under the Pradhan Mantri Fasal Yojana.
- Under its 'Horticulture Vision' the state government aims to double the area of under horticulture from 7.5 per cent to 15 per cent and triple the horticulture production by 2030. The state government has also notified the Haryana Agri-Business and Food Processing Policy 2018.
- Total foodgrain production in Haryana in 2017-18 was 16.58[^] million tonnes. Foodgrain and horticulture production in the state reached 5.30 million tonnes and 10.41 million tonnes, respectively, during 2018-19^{**}

Note: ** - 3rd advance estimates, ^^ - 1st advance estimates (Kharif only), ^ - As per 4th Advance Estimates, Data for Wheat is as per 2017-18*

Source: Economic Survey of Haryana, Ministry of Agriculture- Department of Agriculture & Cooperation, Government of India, State Budget 2019-20, 2017-18

KEY SECTOR – AGRICULTURAL AND ALLIED INDUSTRIES... (2/2)

Key players

Nestle India Ltd



- Nestle India is a subsidiary of Nestle SA, Switzerland. Its Indian headquarter is in Gurgaon, Haryana. Its famous brands in India include Nescafé, Maggi, Milkybar, Milo, Kit Kat, Bar-One, Milkmaid, Nestea, Nestle Milk, Nestle Fresh 'n' Natural Dahi and Nestle Jeera Raita.
- The company has a factory at Samalkha, Panipat, which was commissioned in 1993, to manufacture milk products.

GlaxoSmithKline Consumer Healthcare Ltd (GSK)



- GlaxoSmithKline Consumer Healthcare Ltd (GSKCH) is an Indian group company/associate of GlaxoSmithKline UK and one of the largest players in the health food & drink industry in India.
- GSK has a factory at village Khewra, Sonipat, with a capacity of 26,100 tonnes per annum for its brand Horlicks.

Haldiram's Foods International Ltd



- Haldiram's started in Bikaner and is one of India's largest sweets and snacks manufacturers. The company sells packaged food and snacks, which are not only consumed in domestic markets but also exported to various countries viz., Pakistan, Canada, Australia, Sri Lanka, Singapore, Malaysia, South Africa, Indonesia, Qatar, Hong Kong, Japan, Kenya, Libya and South Korea. Haldiram's also has its own outlets where it sells sweets and eatables.
- In Haryana, Haldiram Manufacturing Co Pvt Ltd is located in village Kherki Daula on the Delhi-Jaipur highway.

PepsiCo India



- PepsiCo established its business operations in India in 1989. The company has a diverse range of products including carbonated drinks and potato chips. It employs 6,400 people and provides indirect employment to almost 200,000 people. It has 38 beverage bottling plants and three food plants in the country.
- Its corporate office is in Gurugram.

KEY SECTOR – AUTOMOBILES... (1/2)

- Haryana is a preferred destination for auto majors and auto-component manufacturers. The state is host to many large automotive players.
- The state produces two-thirds of passenger cars, 50 per cent of tractors and 60 per cent of motorcycles manufactured in the country.
- A significant percentage of the state's workforce is engaged in the automotive industry; Gurgaon & Faridabad are important automobile centres.
- The International Centre for Automotive Technology (ICAT) has been set up at Manesar as a part of the National Automotive Testing & Research & Development (R&D) Infrastructure Project (NATRiP). It provides testing & R&D services to the industry.
- Automobiles and auto component exports from Haryana were around US\$ 1.39 billion in FY18 and have reached US\$ 945.62 million between Apr-Dec 2018.

Automotive clusters in Haryana



Source: Haryana Economic Survey 2017-18, NSDC & KPMG – Human Resources and Skill Requirements in Auto and Auto Components Sector, DGCIS Analytics

Key players

Maruti Suzuki India Ltd



- Maruti Suzuki India had a market share of around 40 cent in the Indian passenger car market at the end of March 2012. Its Gurgaon facility has three integrated plants, with an installed capacity of around 900,000 units; the fourth plant is located at Manesar. The Gurgaon plant would eventually serve as a base for engine assembly and machining, while automobile assembly is done at the Manesar plant.
- The company had a 50 per cent share in Indian passenger car market in 2017-18. The company had an annual production capacity of 1.56 million units in Haryana and produced 1.62 million units in 2017-18.

Escorts Group



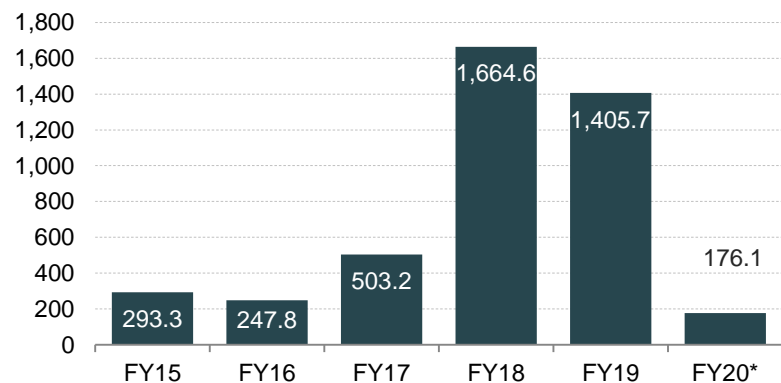
- Escorts is a leading engineering conglomerate in the high growth sectors of agri-machinery, construction and material handling equipment, railway equipment and auto components. Its corporate headquarters and manufacturing facilities for tractor assembly, transmission and engines, crankshaft and hydraulics is located in Faridabad.

Yamaha Motor Pvt Ltd



- Yamaha Motors is a 100 per cent subsidiary of Yamaha Motor Company Ltd, Japan. The company has more than 2,000 employees in India, and a countrywide network of over 400 dealers. It has a manufacturing plant in Faridabad, which supplies bikes to the domestic as well as overseas market.

Exports of Electric Machinery & Equipment from Haryana (US\$ million)



IT & ITeS Cluster in Gurugram

Global BPM workforce	5%
India's BPM Workforce	13%
Contribution to Haryana's GDP	10%
Contribution to Haryana's Exports	54%

- Gurugram has emerged as a preferred destination for the IT industry in North India. As per Haryana's economic survey 2017-18, licenses of 49 IT parks have been granted while there are six IT/ITeS SEZs operational in the state.
- Haryana is among the leading states in terms of IT exports. The software and IT export for the FY18 is expected to be US\$ 8 billion from Haryana. Exports of electric machinery and equipment for Haryana reached US\$ 1.41 billion in FY19 and US\$ 176.1 million between Apr-Sept 2019.
- The state government has notified following policies for creating an ecosystem to take Haryana on the path of digital revolution:
 - IT & ESDM Policy 2017
 - Entrepreneur & Start up Policy 2017
 - Communication & Connectivity Infrastructure Policy 2017
 - Cyber Security Policy 2017

*Note: ESDM - Electronics System Design & Manufacturing, *- till September 2019*

Source: Haryana Economic Survey 2017-18, State Budget 2018-19, Government of Haryana, DGCIS Analytics

Key players

IBM Global Process Services



IBM Global Process Services (formerly IBM Daksh) is a leading provider of business process solutions, with its corporate office in Gurgaon. The company has 23 service delivery centres at nine locations in India and Philippines and employs more than 100,000 persons, making it one of the largest Business Process Outsourcing (BPO) vendors in India in terms of headcount. Haryana was awarded the software centre of excellence by IBM.

Tata Consultancy Services (TCS)



TCS is among the largest providers of IT and BPO services in India. The company's clients are in BFSI, healthcare & life sciences, insurance, manufacturing, media, entertainment, transportation, travel & hospitality, retail, utilities and energy resources sectors. It commenced operations in Gurgaon in 1995.

Microsoft Corporation



Microsoft entered India in 1990 and works closely with the Indian government, IT industry, academia and the local developer community.

In India, Microsoft employs about 5,800 people and has six business units representing the complete Microsoft product lifecycle. The company has two offices in Haryana, both at Gurgaon.

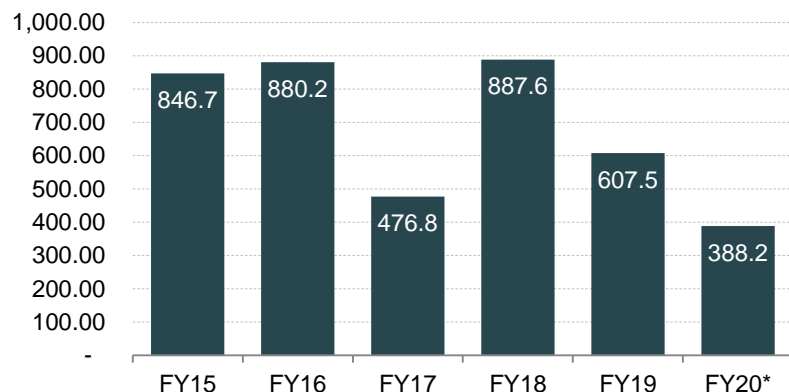
Google



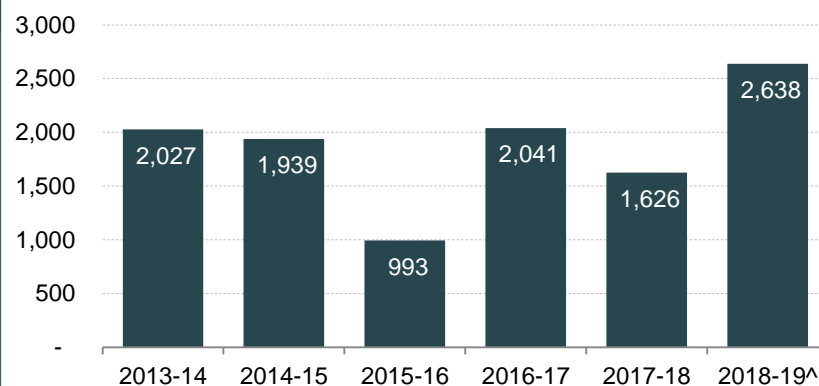
Google, a web based search engine, is the flagship product owned by Google, Inc. It offers special features such as synonyms, weather forecasts, time zones, stock quotes, maps, earthquake data, movie-show times, airports, home listings and sports scores.

Google has a sales office in Gurgaon. It is a direct sales organisation and helps the world's biggest advertisers to enjoy immediate and accountable communication with the consumer. The sales teams here are structured according to industry verticals.

Haryana's Export of Ready Made Garments* of Cotton (US\$ million)



Cotton (Lint) Production in Haryana ('000 bales of 170 Kg)



- Haryana is the fourth largest producer of cotton in India and contributes around 6 per cent of the country's total production. Easy availability of raw material provides the state with competitive advantage in the textiles sector, which provides employment to around one million people in Haryana.
- Districts such as Panipat, Gurugram, Faridabad, Hisar and Sonapat have developed into robust textile centers in Haryana.
- Readymade garments of cotton are one of the major exports of Haryana, with their export reaching US\$ 607.52 million in FY19 and US\$ 388.2 million between Apr-Sept 2019.
- The state government also notified a new Textile Policy 2018 to promote the development of the sector in the state.

*Note: *including accessories, ^ - As per 1st Advance Estimates, ** - till September 2019*

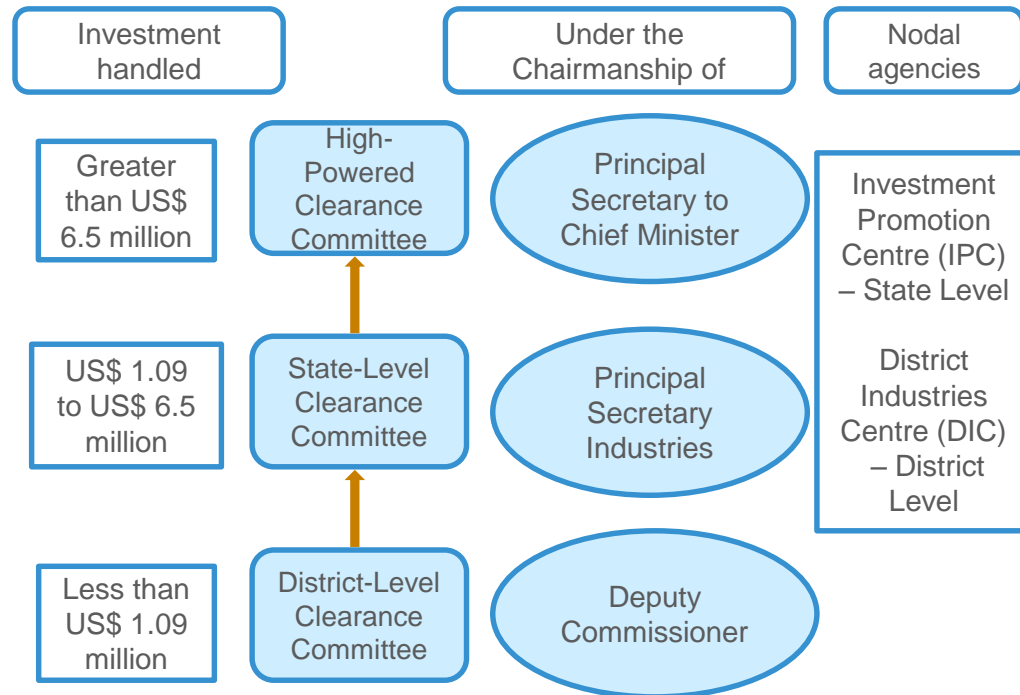
Source: DGCIS Analytics, Haryana Textile Policy 2018, Invest India, Agriculture Department of Haryana

KEY PROCEDURES & POLICIES



SINGLE-WINDOW CLEARANCE MECHANISM

- Single-window clearance mechanism was established under the Haryana Industrial Promotion Act, 2005. It has a three-tier structure to grant exemption/relaxation from any of the provisions/rules of the Act.
- The Investment Promotion Centres (IPC) located in New Delhi and Chandigarh and District Industries Centres (DIC) at the district level serve as nodal agencies and provide support to the committees.



KEY INVESTMENT PROMOTION OFFICES

Agency	Description
Haryana State Industrial and Infrastructure Development Corporation Ltd (HSIIDC)	<ul style="list-style-type: none"> ▪ Focusses 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 Ltd (HAIC)	<ul style="list-style-type: none"> ▪ Engaged in trading activities such as sale of seeds, fertilisers, pesticides, tractors and other agricultural machinery at economical prices to the farming community.
Haryana State Electronics Development Corporation Ltd (HARTRON)	<ul style="list-style-type: none"> ▪ Nodal agency of the Government of Haryana for promoting electronics and IT industries. ▪ It offers expertise in infrastructure development as well as promotion of projects.
Haryana Urban Development Authority (HUDA)	<ul style="list-style-type: none"> ▪ Responsible for promoting and securing development of urban areas; activities include land acquisition, development and sale of property for residential, industrial and commercial purposes.
Haryana Finance Corporation (HFC)	<ul style="list-style-type: none"> ▪ Meets the credit needs of small- and medium-scale industrial units by advancing term loans.

CONTACT LIST

Agency	Contact information
Haryana State Industrial and Infrastructure Development Corporation Ltd (HSIIDC)	Plot No C-13-14, Sector 6, Panchkula-134109 Phone: 91-172-2590 481 Fax: 91-172-2590 474 E-mail: info@hsiidc.org Website: www.hsiidc.org
Haryana Urban Development Authority (HUDA)	C-3, Sector-6, Panchkula Phone: 91-172-2567 857 E-mail: huda@hry.nic.in Website: www.huda.gov.in
Haryana Finance Corporation (HFC)	Bays 17-18-19, Sector 17-A, Chandigarh-160017 Phone: 91-172-2702 755-57 Fax: 91-172-2702 666 E-mail: mdhfc@airtelmail.in Website: www.hfcindia.org
Haryana State Electronics Development Corporation Ltd (HARTRON)	SCO-109-110, Sector 17-B, Chandigarh -160017 E-mail: hartron@hartron.org Website: www.hartron.org.in

KEY APPROVALS REQUIRED

Approvals and clearances required	Department	Estimated time
Site clearances and No-objection Certificate	Department of Environment/Haryana Pollution Control Board	Site and/or environment clearance: 60 days No-objection certificate to establish: 7 days No-objection certificate to operate: 30 days Renewal of consent: 21 days
Approval, No-objection Certificate and change of industrial land	Department of Town and Country Planning	Change of land use in industrial zone: 30 days No objection certificate for establishment of industrial unit under the Urban Area Act: 15 days Approval of building plan: 30 days
Approval and licence	Labour Department/ Chief Inspector of Factories	Approval of factory plan under the Factories Act, 1948 (Act 63 of 1948): 90 days Licence for running factory: 15 days
Release of power connection	Uttar Haryana Bijli Vitran Nigam/Dakshin Haryana Bijli Vitran Nigam	Load up to 20 KW: 21 days Load up to 70 KW: 45 days Load above 250 KW: 60 days Load above 1 MW: 60 days
Sales tax	Excise and Taxation	Sales tax registration: 15 days

COST OF DOING BUSINESS IN HARYANA

Cost parameter	Cost estimate	Source
Industrial land (per sq m)	US\$ 28.7-67	Industry sources
Office space rent (per sq ft)	Gurgaon: US 31 cents to US 74 cents per month	Industry sources
Residential rent (2,000 sq ft)	US\$ 287 to US\$ 478 per month	Industry sources
Five-star hotel room rent	US\$ 80.4 per room per night	Leading hotels in the state
Power (per kWh)	Commercial & Industrial: US 9.6 cents	Industry sources
Water (per 1,000 litres)	Commercial & Industrial: US 9.6 cents	Water Supply and Sanitation Department

- As per the World Bank and Department of Industrial Policy and Promotion (DIPP) report - Assessment of State Implementation of Business Reforms 2017, the state ranked 3rd in the Ease of Doing Business Index.

Objectives

Haryana Agri-Business and Food Processing Policy 2018

- Make the state a preferred investment destination for food processing sector
- Promote start-ups in agri-business space in Haryana
- Increase farmers' income through new agro-marketing reforms

[Read more](#)

Textile Policy 2019

- To generate 50,000 new jobs in the textile sector
- To boost textile export by CAGR of 20 per cent during the policy period
- To achieve balanced regional growth especially promoting growth in the regions that are lagging in development

[Read more](#)

IT & ESDM Policy 2017

- Attract US\$ 2.79 billion as investments in IT & EDSM sector in the next five years
- Provide employment to 120,000 people in the sector.
- Increase IT & EDSM sector's contribution to the state's GDP from 9.4% to 15%.

[Read more](#)

Aerospace & Defence Policy 2016

- Attract orders for at least 15% of all offset obligations discharged by companies in India by leveraging the existing ancillary base and promoting new MSMEs dedicatedly for A&D sector
- To attract investment of over Rs 25,000 crore throughout the value-chain including research, design, development, manufacturing, maintenance, quality control and training

[Read more](#)

Haryana Sports and Physical Fitness Policy 2015

- The policy aims at two themes, namely - Sports for All and Excellence in Sports
- The policy covers five major goals such as - introduction to sports, recreational sports, competitive sports, high performance sports and sports for development.

[Read more](#)

Objectives

Enterprise Promotion Policy, 2015

- The major objectives of this policy is to facilitate ease of doing business in the state, reduction in cost of doing business in order to attract more number of players, and have an increased focus on MSMEs

[Read more](#)

New Integrated Licensing Policy (NILP) 2015

- To develop hyper & high potential urban complexes in the state
- To allow real estate developers in setting up projects that are less than 100 acres of area

[Read more](#)

Industrial and Investment Policy 2011

- To achieve higher, sustainable and inclusive economic growth by attracting investments in a focussed and structured manner in potential areas.
- Encourage private sector investment and promote the manufacturing sector
- as a key economic driver

[Read more](#)

Rehabilitation and Resettlement Policy, 2010

- To smoothen out the land acquisition process under the Land Pooling Scheme.
- To make fair payment of market value as compensation for land to land owners.

[Read more](#)

Haryana Tourism Policy 2008

- To increase the earnings from tourism inflow at the rate of 10.0% annually.
- To promote sustainable tourism by encouraging a constructive and mutually beneficial partnership between the public and private sectors for economic development and employment generation.

[Read more](#)

Objectives

Labour Policy

- To implement labour laws for ensuring proper working conditions and labour standards.
- To improve working conditions for women and eliminate all forms of child labour.
- To train and retain employees and officers.

[Read more](#)

Land Pooling Scheme

- To acquire land for development of industrial infrastructure in a planned manner by the HSIIDC.
- To provide land owners with an option to become partners in the development process.

[Read more](#)

Public Private Partnership Policy

- To facilitate private sector participation in upgrading, developing and expanding the state's physical and social infrastructure.

[Read more](#)

- The policy visualises Haryana as a resourceful and innovative startup hub by supporting & assisting the new-age innovators and entrepreneurial talents across the state.
- Objectives:
 - Attract investments into the incubation and startup ecosystem in Haryana during policy period
 - Establish at least 10 technology /business incubators / accelerators in each of the different sectors in the state in different regions of the state
 - Develop 1 million sq. ft. of incubation space
 - Encourage/facilitate/incubate at least 500 startups
- Haryana State Electronic Development Corporation Limited (HARTRON) introduced a start-up warehouse on 10,000 sq. ft. of land in Gurugram under the policy.
- The policy also proposed building of sector specific incubation centers which would provide facilities such as common working space, test and demonstration facilities, mediation and network, training and coaching and business support.
- Various incentives are offered to startups/entrepreneurs under the policy. Few of these are interest subsidy, lease rental subsidy and innovation promotion subsidy.
- The government also decided to create a fund of funds to support startups at the stages of seed funding and venture capital.
 - Seed capital of upto US\$ 4,656 shall be provided for validation of idea, prototype development and initial activities to setup the startup. A total of 500 ideas would be supported with seed capital.
 - The government would also create a fund of US\$ 1.5 million dedicated to meet the funding requirement for scalability.

ANNEXURE



ANNEXURE...(1/2)- SOURCES

Data	Sources
GSDP (state)	Economic Survey 2018-19
Per capita GSDP figures	Central Statistics Office
GSDP (India)	Central Statistics Office
Installed power capacity (MW)	Central Electricity Authority
Wireless subscribers (No)	Telecom Regulatory Authority of India
Internet subscribers (Mn)	Telecom Regulatory Authority of India
National highway length (km)	NHAI, Roads and Building Department-Government of India
Airports (No)	Airports Authority of India
Literacy rate (%)	Census 2011
Birth rate (per 1,000 population)	SRS Bulletin September 2017
Cumulative FDI equity inflows (US\$ billion)	Department of Industrial Policy & Promotion
Operational PPP projects (No)	DEA , Ministry of Finance, Government of India
Operational SEZs (No)	Notified as of December 2017, Ministry of Commerce & Industry, Department of Commerce

ANNEXURE...(2/2) - EXCHANGE RATES

Exchange Rates (Fiscal Year)

Year INR	INR Equivalent of one US\$
2004-05	44.95
2005-06	44.28
2006-07	45.29
2007-08	40.24
2008-09	45.91
2009-10	47.42
2010-11	45.58
2011-12	47.95
2012-13	54.45
2013-14	60.50
2014-15	61.15
2015-16	65.46
2016-17	67.09
2017-18	64.45
2018-19	69.89

Exchange Rates (Calendar Year)

Year	INR Equivalent of one US\$
2006	45.33
2007	41.29
2008	43.42
2009	48.35
2010	45.74
2011	46.67
2012	53.49
2013	58.63
2014	61.03
2015	64.15
2016	67.21
2017	65.12
2018	68.36
2019	69.83

Source: Reserve Bank of India, Average for the year

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