



Government of Madhya Pradesh



Creating a favourable environment for growth

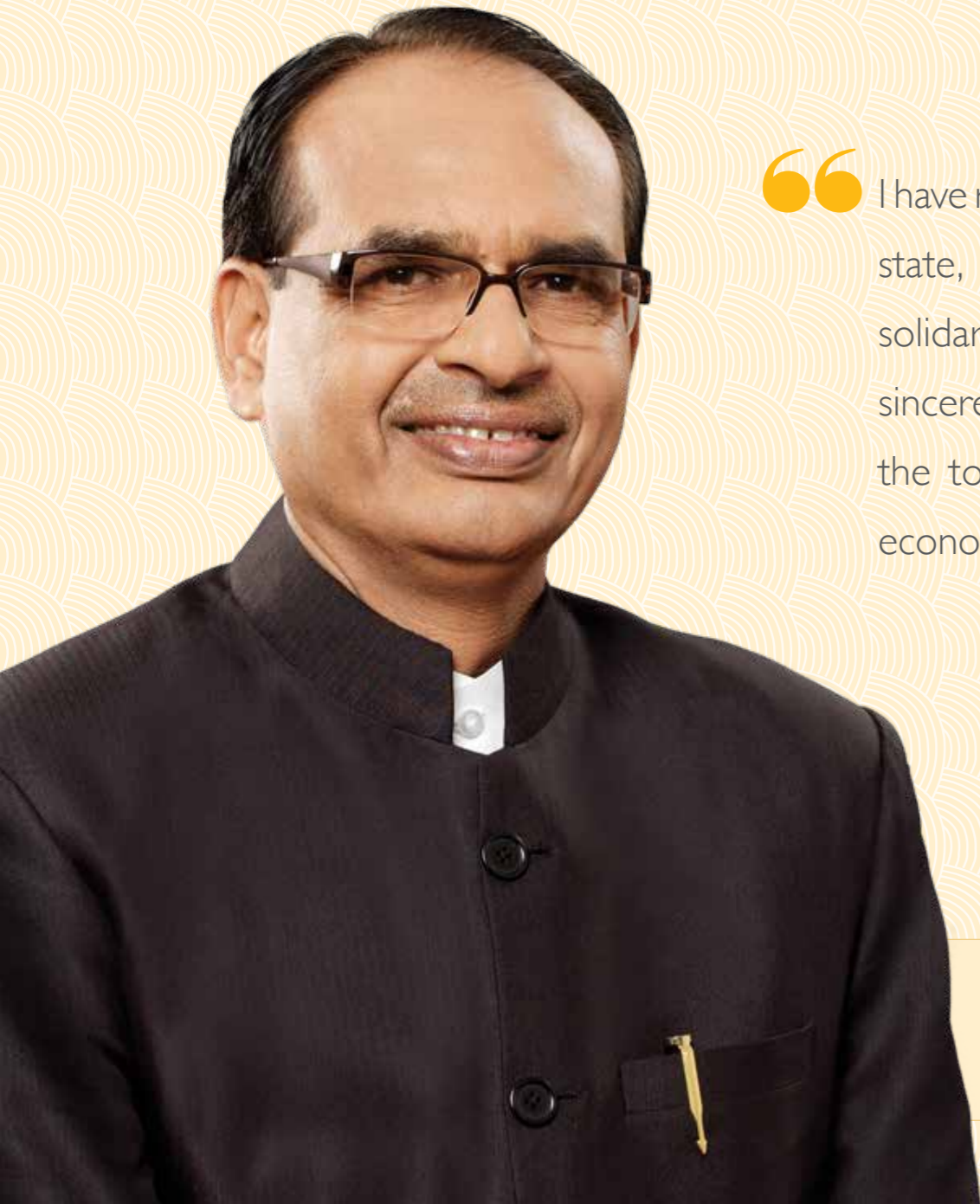


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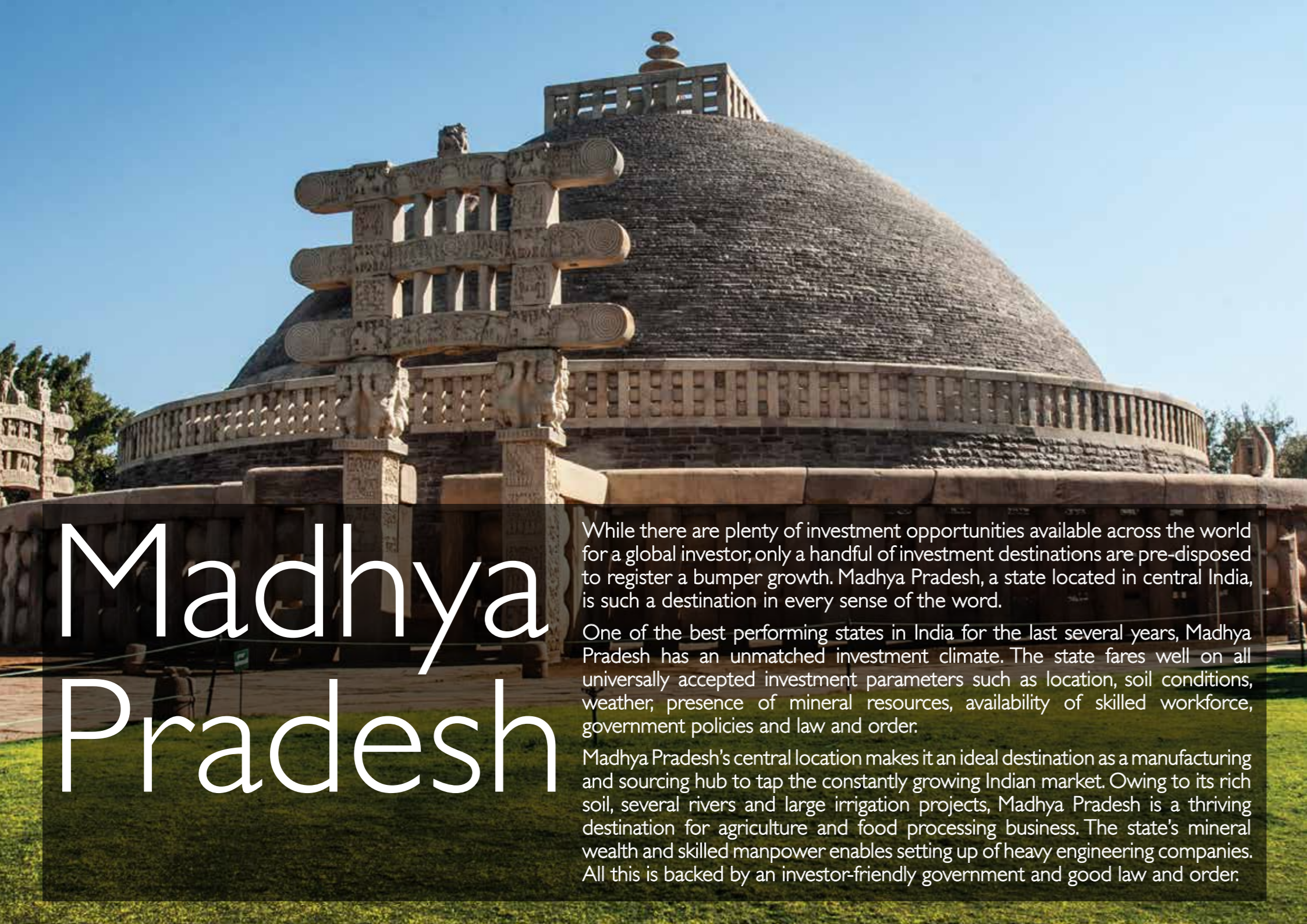
“ I have resolved to make Madhya Pradesh a developed state, which will be known for peace, harmony, solidarity and economic prosperity. We are making sincere efforts to develop Madhya Pradesh as one of the top ranking states of India in terms of socio-economic development. ”

Shivraj Singh Chouhan  
Chief Minister, Madhya Pradesh



“ Madhya Pradesh has entered into a phase of accelerated socio-economic growth over the last decade. Our transparent policies, investments in developing infrastructure, human capital development initiatives, technological advancement, good governance and progressive institutions have been playing a key role in making our growth inclusive and sustainable. In addition to this, proactive measures and reforms have laid the foundation of a healthy investment climate in the state. ”

Yashodhara Raje Scindia  
Minister of Commerce, Industries and Employment, Government of Madhya Pradesh



# Madhya Pradesh

While there are plenty of investment opportunities available across the world for a global investor, only a handful of investment destinations are pre-disposed to register a bumper growth. Madhya Pradesh, a state located in central India, is such a destination in every sense of the word.

One of the best performing states in India for the last several years, Madhya Pradesh has an unmatched investment climate. The state fares well on all universally accepted investment parameters such as location, soil conditions, weather, presence of mineral resources, availability of skilled workforce, government policies and law and order.

Madhya Pradesh's central location makes it an ideal destination as a manufacturing and sourcing hub to tap the constantly growing Indian market. Owing to its rich soil, several rivers and large irrigation projects, Madhya Pradesh is a thriving destination for agriculture and food processing business. The state's mineral wealth and skilled manpower enables setting up of heavy engineering companies. All this is backed by an investor-friendly government and good law and order.



Strategic Location

Strong Resource Base

Consistent Economic Growth

Robust Support Infrastructure

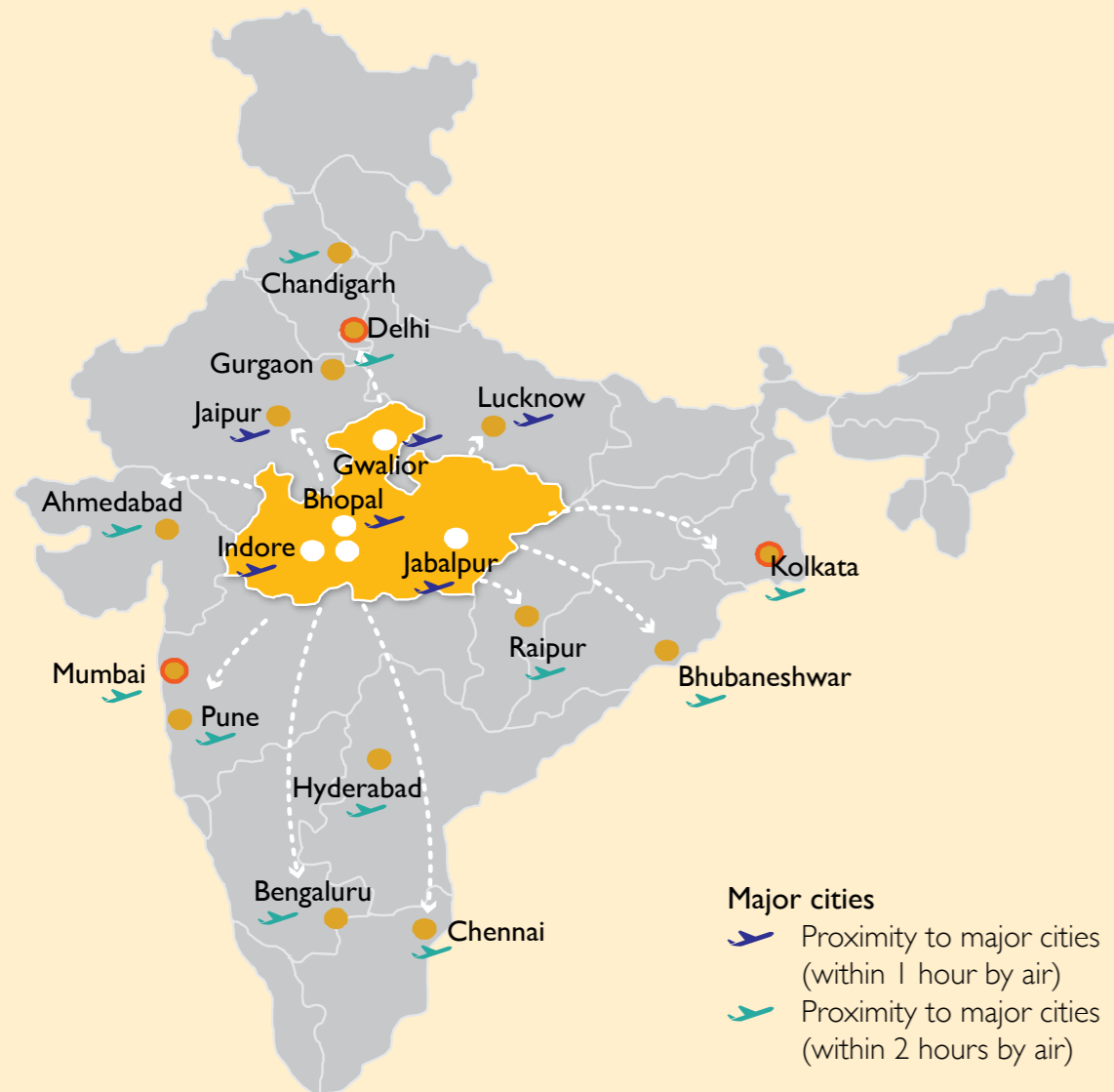
Industrial Cluster and Economic Hubs

Favourable Policies

Ease of Doing Business

Industry Confidence

## Strategic Location

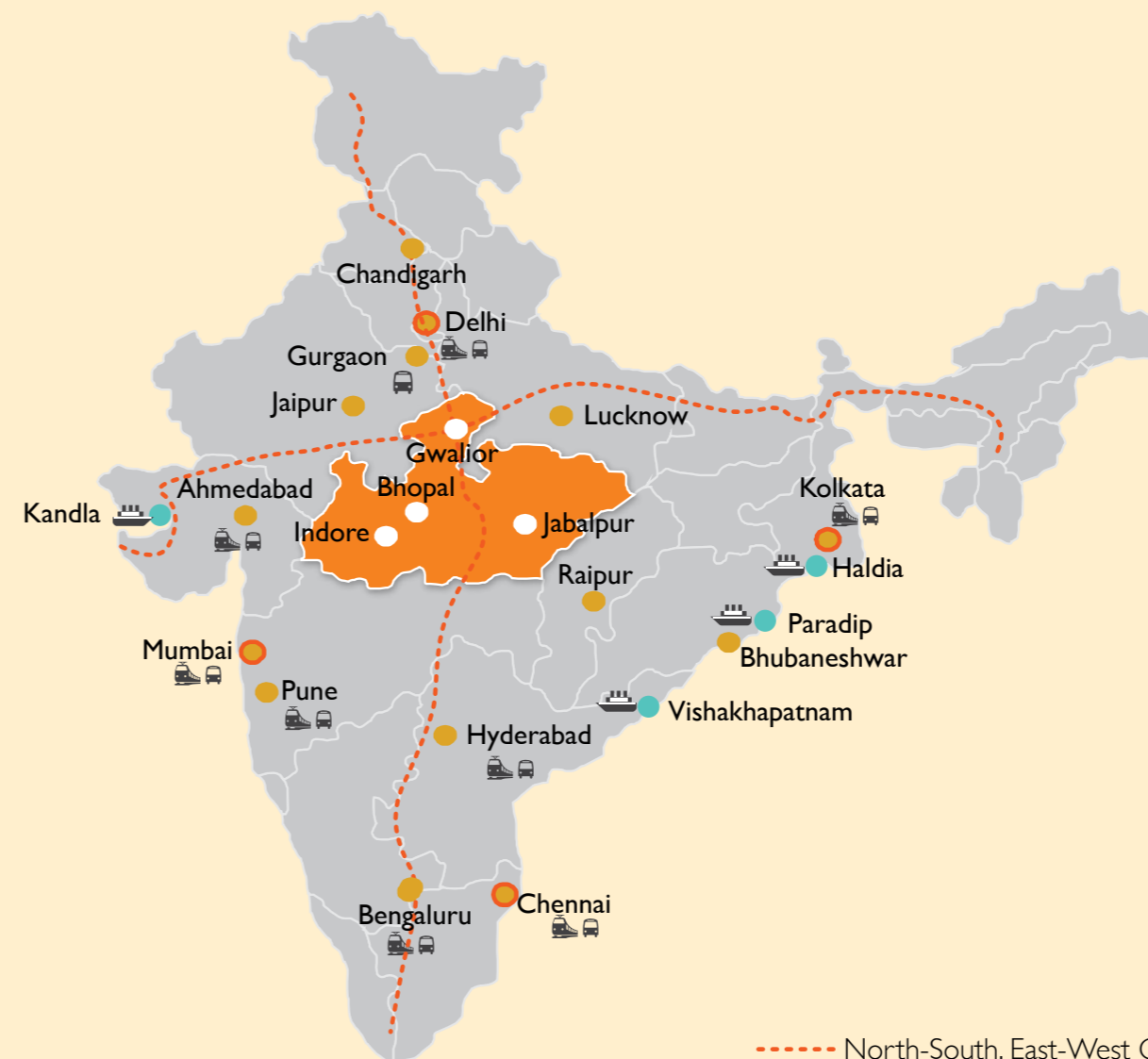


### Equidistant from metros

#### Air connectivity

- ▶ Direct flights to key cities such as Delhi, Mumbai, Bengaluru, Ahmedabad, Hyderabad, Kolkata & Pune
- ▶ Increased accessibility to tourist centres within the state through an intra-state air taxi - AirVentura

**Air Ventura, connecting the state of Madhya Pradesh: The first intra-state air taxi service in the state**



Well-connected to key cities and consumer markets

#### Train connectivity

- ▶ 425 trains transit through Madhya Pradesh daily
- ▶ 220 trains transit through the state's capital Bhopal alone
- ▶ North-South and East-West corridors cut across Madhya Pradesh

#### Road connectivity

- ▶ 18 National Highways, totalling 5,000 kms criss-cross Madhya Pradesh
- ▶ 10,000 kms of State Highways

#### Connectivity to Ports

- ▶ Convenient access to major ports such as Kandla Port and Jawaharlal Nehru Port



## Strong Mineral Resource Base

▶ Only diamond producing state in India

▶ Major cement producing state in India, accounting for 14% of the total cement production

▶ India's largest opencast copper mine at Malanjkhand, Balaghat

▶ Thickest coal seam (135m) in Asia at Singrauli coalfield

▶ Leading producer of Manganese, Dolomite, Rock Phosphate and Glass Sand

▶ Major producer of Coal, Limestone, Copper, Diaspore and Pyrophyllite

## Robust Support Infrastructure

### Water



- ▶ 56,857 MCM water is available from 10 main rivers for irrigation of 69.74 lakh ha of land
- ▶ Approximate 900 MCM water of Narmada river is reserved for industrial use, making Madhya Pradesh ideal for water based industries
- ▶ Opportunity for establishing a water grid for potable water with a private partner

### Land



- ▶ One of the lowest industrial land rates in India
- ▶ Second state in India to provide land for mega projects at 75% discount
- ▶ Over 20,000 hectare land bank available for investment
- ▶ Major land parcels available near Indore, Bhopal, Ujjain, Jabalpur, Gwalior and Shajapur
- ▶ **Large tracts of land available in Madhya Pradesh at very competitive rates**

### Power



- ▶ One of the lowest industrial power rates in India
- ▶ Power surplus state with an installed capacity of 14000 MW
- ▶ Average power rate is INR 5.9 for HT users
- ▶ Madhya Pradesh supports open access to power with separate feeder lines for industrial use
- ▶ 24 hours HT power available to industries
- ▶ The state has invested INR 97 billion in expansion and upgradation of its electricity distribution network

**Madhya Pradesh is home to the single largest solar voltaic unit in India at Neemuch**

## Consistently Strong Economic Growth

Consistent double digit growth during last decade - 17% CAGR in GSDP during FY05- FY14\*



- ▶ 25% growth in agriculture sector in 2013-14, one of the highest in the world\*\*
- ▶ Consistently achieving a revenue surplus since 2004-05

### Financial Growth

- ▶ 17.67% average growth rate in Tax Revenues during last five years
- ▶ 6 times growth in Capital Expenditure during FY 04 - FY 14
- ▶ Interest payment burden expected to reduce from 22.44% in FY04 to 6.7% in FY15
- ▶ 22.37% expected outstanding debt\*\*\* in FY15 (limit under FRBM Act- 34%)

\*CAGR at current prices \*\*at constant prices, base 2004-05 \*\*\*as % of GSDP

# Growing Industry Confidence



“Visionary leadership of the Chief Minister to drive the growth of the state, despite the global slowdown and cautious investment prevailing sentiment. ”

Anil Ambani, Chairman, Reliance (ADAG)



“The state of Madhya Pradesh is not only a strategic location, but also a friendly place to do business.”

David C. Everitt, President, John Deere



“Madhya Pradesh has made a remarkable progress over the past decade. What strikes me is that the state government’s efforts and the development structure that brought this transformation making Madhya Pradesh a prominent investment destination.”

Adi Godrej, President, CII and Chairman, Godrej Group



“The growth of state is holistic and has a progressive government with transparent and consistent policy making and its implementation.”

Kumar Mangalam Birla, Chairman, Aditya Birla Group

“I personally look forward and encourage you to come and invest in the state of Madhya Pradesh. The state is doing exceedingly well in terms of growth, infrastructure, manufacturing and services. The growth and the governance that one has witnessed in the state over the last many years has been fantastic.”

Malvinder Mohan Singh, Executive Chairman, Fortis

“Significant development in infrastructure, road, power, water, investor friendly approach by Govt. has transformed Madhya Pradesh to Mazboot (Strong) Pradesh”

Abhay Firodia, Chairman, Force Motors

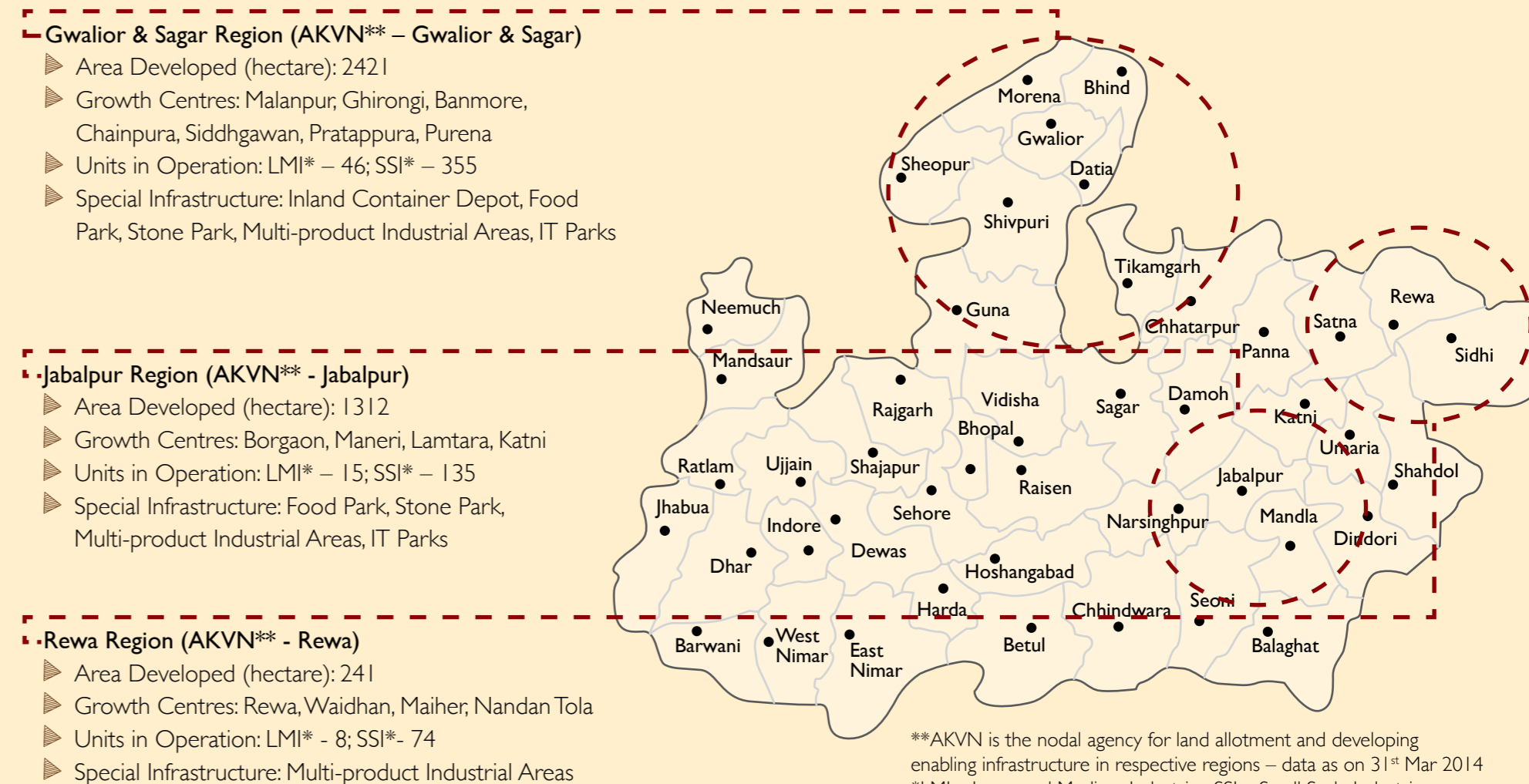
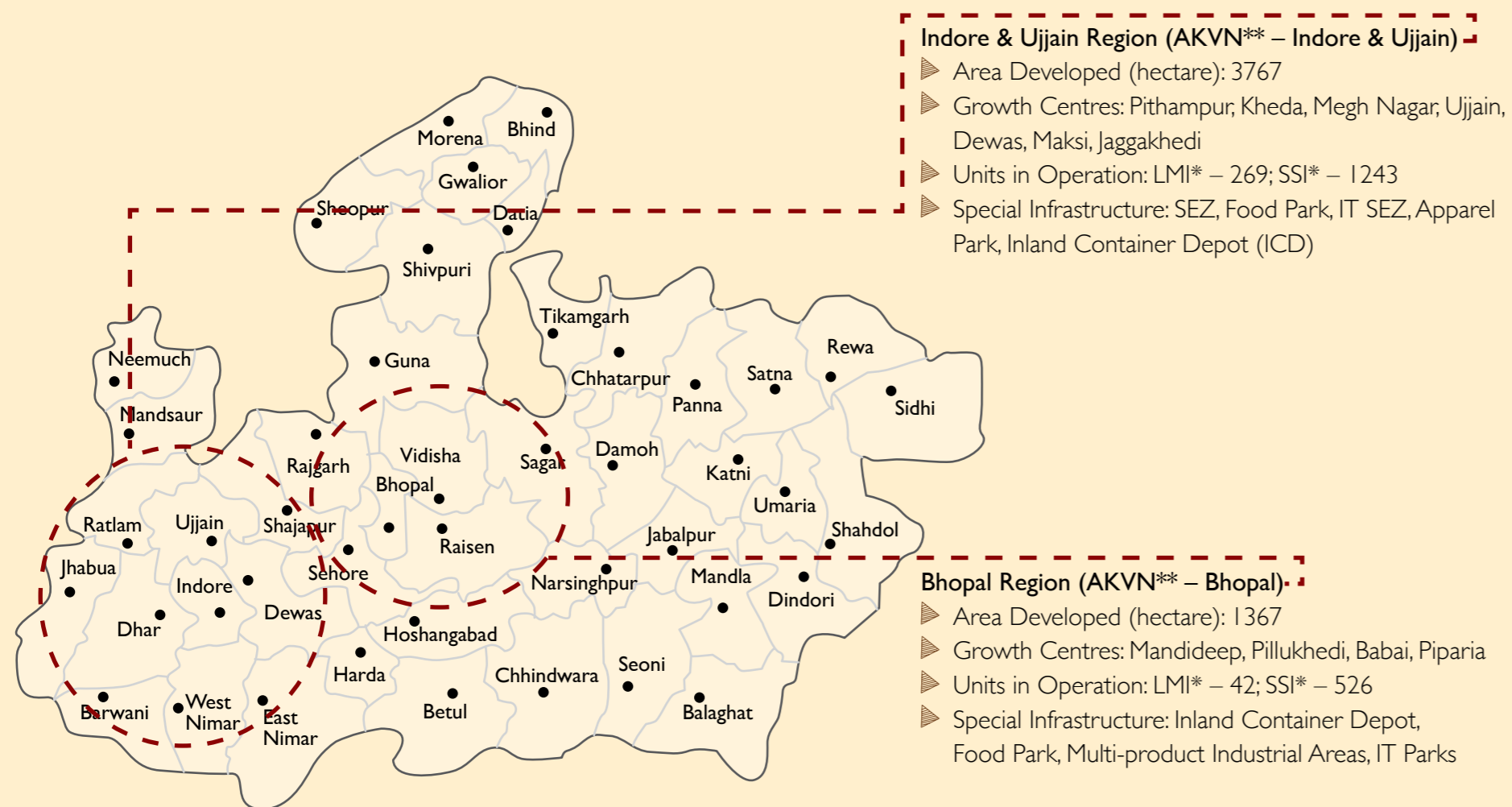


## Leading Players



# Cluster Approach for Industry Development

Over 8990 hectare of industrial infrastructure developed by Audyogik Kendra Vikas Nigam (AKVN)

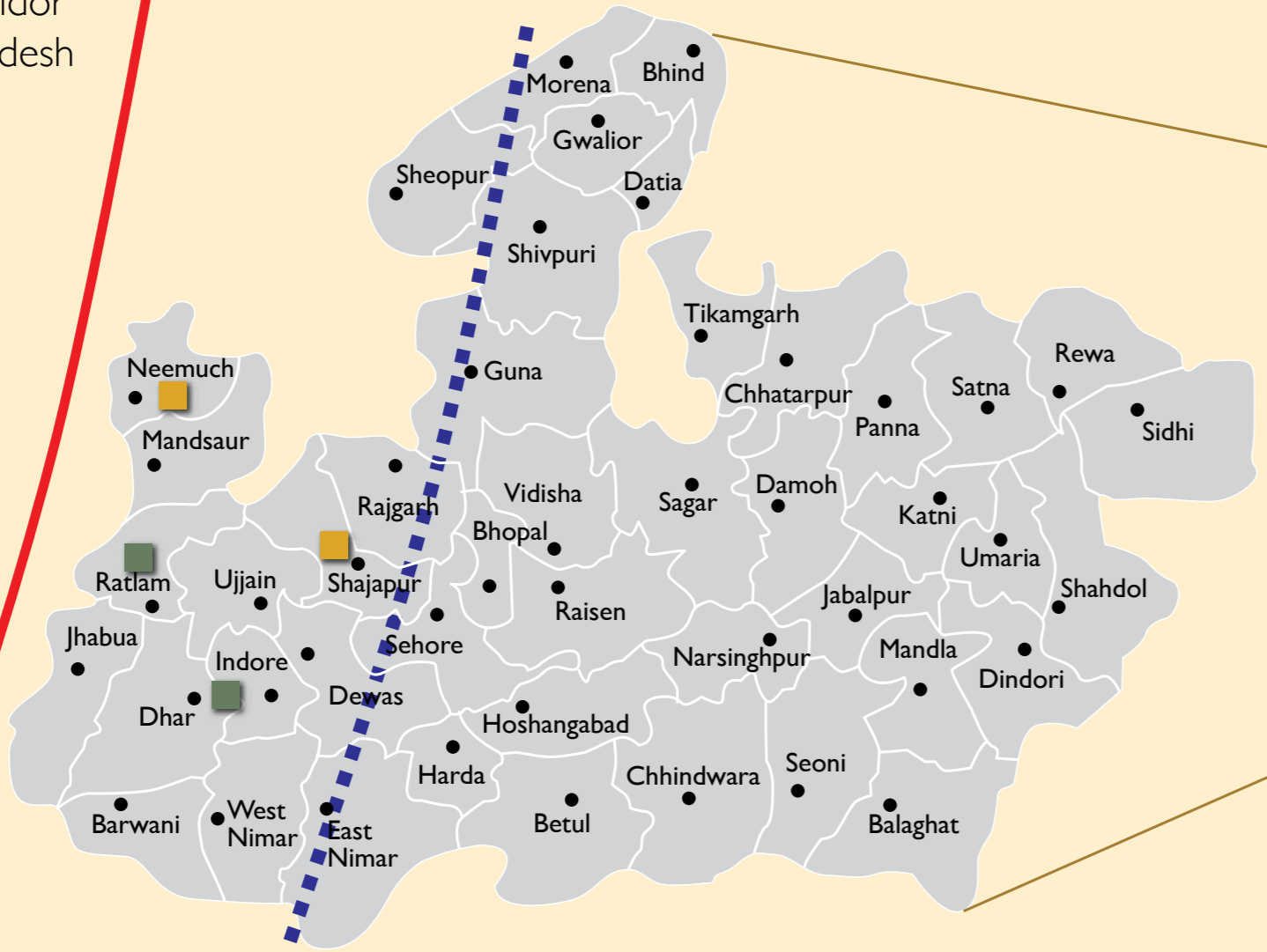


\*\*AKVN is the nodal agency for land allotment and developing enabling infrastructure in respective regions – data as on 31<sup>st</sup> Mar 2014  
 \*LMI – Large and Medium Industries; SSI – Small Scale Industries

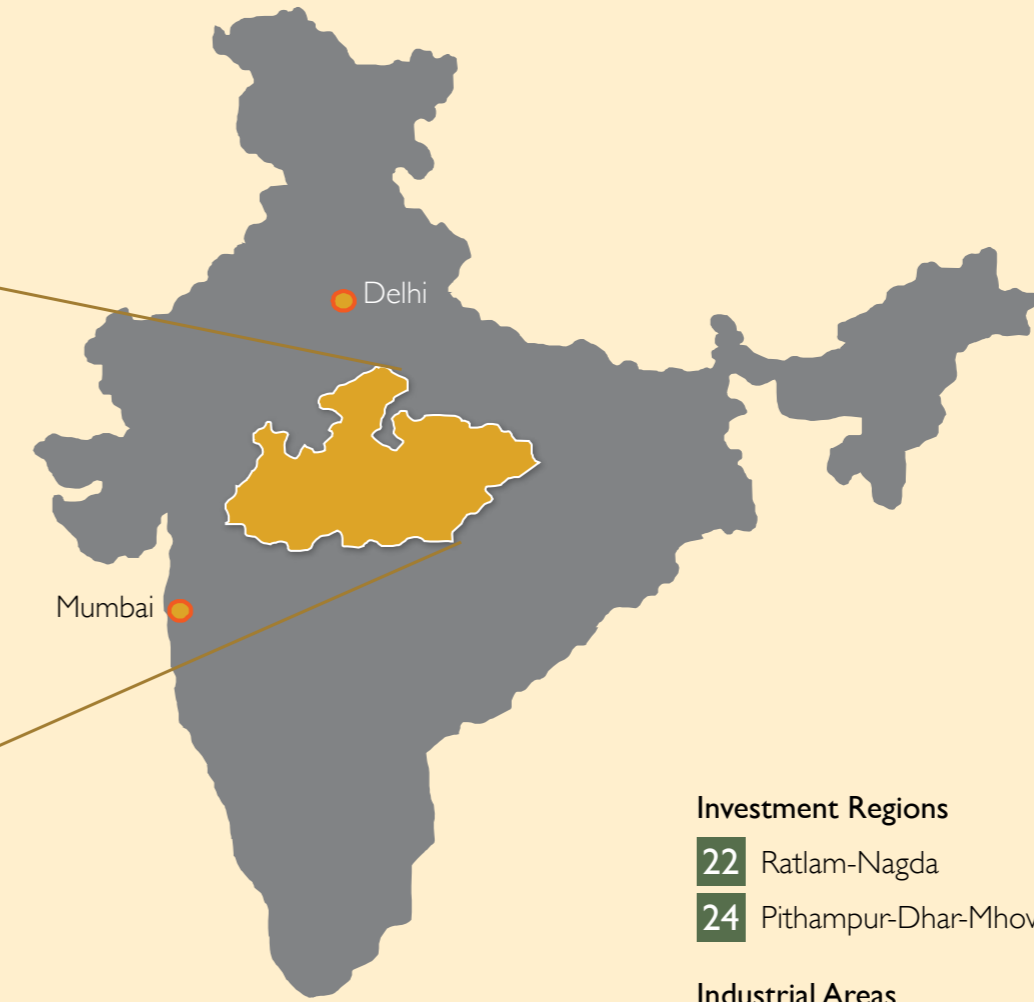


# Government Proactiveness: Industrial Infrastructure Development

Delhi Mumbai Industrial Corridor  
Influence Area in Madhya Pradesh



■ ■ ■ DMIC Influence Area - MP  
— DFC Alignment



Four development nodes have been identified in Madhya Pradesh under the Delhi Mumbai Industrial Corridor project i.e. Node 21, Node 22, Node 23 and Node 24, with a combined area of 58,562 sq. km. under planned development.

### Investment Regions

- 22 Ratlam-Nagda
- 24 Pithampur-Dhar-Mhow

### Industrial Areas

- 21 Neemach-Nayagaon
- 23 Shajapur-Dewas

### Early Bird Projects

- ▶ Water supply project for Pithampur Industrial Area
- ▶ Vikram Udyogpuri Project (Smart City) at Ujjain District
- ▶ Multi Modal Logistics Hub at Pithampur Industrial Area
- ▶ Economic Corridor from Indore Airport to Pithampur Industrial Area

## Ease of Doing Business



### Single Window Facilitator

- ▶ Focused on creating an enabling investment climate to improve 'ease-of-doing business' for existing and prospective investors
- ▶ Developed an 'Online Investor Facilitation & Approval Monitoring System' to provide a range of 30 services to investors on a single platform

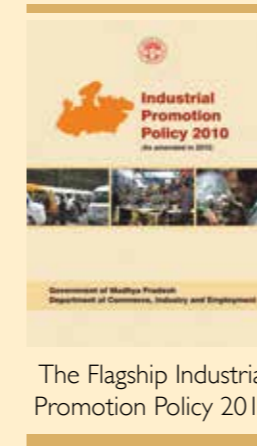


### Investor-Friendly Policies

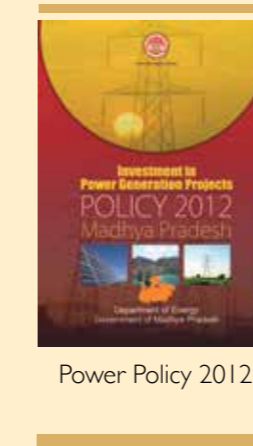
- ▶ VAT and CST reimbursement
- ▶ Exemption from Entry Tax
- ▶ Exemption from Electricity Duty
- ▶ Concession on land for Industrial development
- ▶ Interest subsidy

## Progressive Policies

Best-in-class policies across various sectors



The Flagship Industrial Promotion Policy 2012



Power Policy 2012



Agri-business Policy 2012



Healthcare Policy 2012



Skill Development Policy 2012



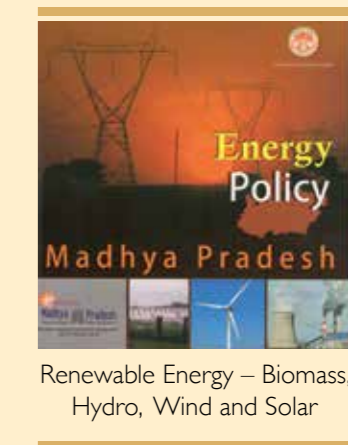
Tourism Policy 2012



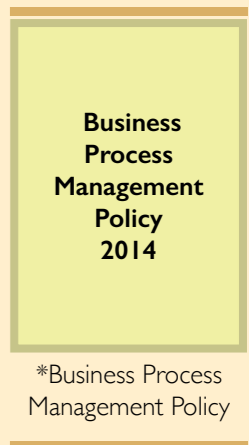
Warehousing & Logistics Policy 2012



IT/ITeS Policy 2012



Renewable Energy – Biomass, Hydro, Wind and Solar



\*Business Process Management Policy

- ▶ Most competitive incentive package in India for investments in manufacturing
- ▶ Most competitive incentives for investing in IT/ITeS sector
- ▶ Customized packages for auto projects with an investment layout of INR 5 billion and above
- ▶ Only state in India to extend incentives for mother units to vendor units
- ▶ First state in India to introduce incentives for skill development

\*Upcoming





**Leisure**

- ▶ Luxury resorts and spas
- ▶ Golf courses
- ▶ Tiger reserves, wildlife sanctuaries and safaris
- ▶ Three World Heritage Site - Sanchi, Khajuraho and Bhimbetka
- ▶ Ranked sixth in tourist arrivals in India



**Education & Healthcare**

- ▶ Prestigious institutes - IIM, IIT, NID, NIFT, IIFM, SPA
- ▶ Premier healthcare institutes - AIIMS, Bombay Hospital (Indore)
- ▶ World-class schools



**Sports**

- ▶ 17 sports academies & feeder centres offering world-class training & coaching
- ▶ Renowned Women Hockey Academy at Gwalior
- ▶ 3 international cricket stadiums
- ▶ Kayaking competitions

# Priority Sectors for Investment



Agri-business & Food Processing



IT/ITeS



Textile



Automobile & Engineering



Pharmaceuticals



Tourism



Healthcare



Renewable Energy



Urban Development



Industrial Infrastructure



Technical Education & Skill Development



Defence Production



# Agri-business & Food Processing

Nurturing the future of Madhya Pradesh

No.1 producer of soyabean, gram, pulses & oilseeds

- ▶ With highest growth in food grain production in India, Madhya Pradesh has received 'Krishi Karman' award for two consecutive years (FY 2012, FY 2013) & nominated for the FY 2014
- ▶ In addition to this, the state is also the 6th largest producer of milk and 5th largest producer of fish in the country
- ▶ With 5 crop zones, 11 agro-climatic zones and 4 soil types, the state provides a favourable ecosystem for agriculture production
- ▶ To enable a better investor experience, the state has developed 7 Food Parks and 2 Spice Parks
- ▶ Dhar, Ujjain, Chhindwara, Jabalpur, Hoshangabad, Guna, Ashok Nagar, Dewas, Indore, Shajapur, Vidisha, Sagar, Ratlam, Sehore, Mandasaur and Kharogone are the major districts involved in agriculture and allied industries
- ▶ Madhya Pradesh is now forging ahead with horticulture as an emerging sector with the four upcoming hubs at Burhanpur, Shajapur, Ujjain and Mandasaur

## Investment opportunities - from Farm-to-Fork

### Direct procurement

- ▶ Fruits & vegetables
- ▶ Flowers
- ▶ Dairy products
- ▶ Food grains

### Infrastructure development

- ▶ Food Parks
- ▶ Cold storages
- ▶ Warehousing and logistics
- ▶ Irrigation projects

## Food processing and value addition

- ▶ Soyabean and oats
- ▶ Milk
- ▶ Fruits and vegetables

Leading Players



# Automobile & Engineering

## Driving the growth of Madhya Pradesh

Madhya Pradesh plays an important role in sustaining the automotive industry growth in India

- ▶ Largest producer of radial tyres in India
- ▶ Presence of an Indo-German tool room (an initiative between Govt. of India and Federal Republic of Germany)
- ▶ Dedicated Pithampur-Indore Auto Cluster
- ▶ Strong presence of OEMs and auto parts manufacturers
- ▶ Building a world-class racing & testing track at Indore
- ▶ Availability of skilled manpower and robust infrastructure
- ▶ Regulatory support and special incentives for investment in automotive center

### Investment opportunities

- ▶ Assembling and manufacturing of automobiles and auto components
- ▶ Setting up of centres of excellence like automobile design centre, R&D facilities, industry-specific training centres
- ▶ Infrastructure development in the form of Auto & Ancillaries Park and Machine Tools Park
- ▶ Auto financing and vehicle retailing

### Leading Players

BRIDGESTONE

EICHER

FORCE  
MOTORS

Hindustan Motors

भारतीय आयुध निर्माणि  
Indian Ordnance Factories

Mahindra  
2 Wheelers

MAN

VE COMMERCIAL VEHICLES  
A VOLVO GROUP AND ISIRI MOTORS JOINT VENTURE

JOHN DEERE





# Healthcare

Madhya Pradesh healthcare sector has grown consistently with a strong focus on tertiary care

- ▶ Healthcare Investment Policy to encourage private sector participation in Madhya Pradesh
- ▶ Effectively implementing programs of Reproductive and Child Health along with other national programs under the National Rural Health Mission
- ▶ Janani Suraksha Yojna

- Investment opportunities
- ▶ Private hospital
  - ▶ Research centre
  - ▶ Medical college
  - ▶ Healthcare insurance

Leading Players



**Bombay Hospital**  
& Medical Research Centre



# Industrial Infrastructure

Empowering industries for inclusion and growth

- ▶ Consistently high investment in industrial Infrastructure to the tune of INR 87,252 Cr
- ▶ Substantial private investment across manufacturing & infrastructure sectors
- ▶ Establishment of 27 new Industrial Areas on 7,675 ha of land with an investment of INR 30 billion
- ▶ Upgradation of 13 important existing Industrial Areas on 7,701 ha with an investment of INR 4.8 billion
- ▶ 19 Growth Centres, 7 Food Parks, 7 MSME Industrial Areas, 2 Stone Parks, 3 SEZs, 2 Readymade Garment / Apparel Parks, 1 Electronic Complex and 195 other Industrial Areas are developed on 15,158 ha of land

## Upcoming special Infrastructure regions/corridors

### State Investment Corridors

- ▶ Bhopal-Indore
- ▶ Jabalpur-Katni-Satna-Singrauli
- ▶ Bhopal-Bina-Sagar
- ▶ Morena-Gwalior-Shivpuri-Guna

### Delhi Mumbai Industrial Corridor

- ▶ Pithampur-Dhar-Mahu Investment Region
- ▶ Ratlam-Nagda Investment Region
- ▶ Shajapur-Dewas Industrial Area
- ▶ Neemuch-Nayagaon Industrial Area

## Upcoming Infrastructure Projects

- ▶ Apparel, Pharma and Food Processing cluster at Indore
- ▶ Readymade Garment Park, Multi-Product Industrial and a Leather Complex at Gwalior
- ▶ Food Processing Cluster at Shivpuri
- ▶ Plastic Park & Multi Product Industrial Area at Bhopal
- ▶ Flatted Industrial Complex and Convention Centre at Jabalpur
- ▶ Proposed Gems and Jewellery Park & Convention Centre at Indore
- ▶ 1000 MW Gas-based Power Plant at Guna by DMICDC





Indore IT Park

# IT/ITeS

## Moving up the value chain

Emerging IT hub with a large talent pool, excellent education infrastructure and R&D facilities

- ▶ Potential IT hub: Software exports of INR 2.3 billion (USD 45 million approx.) in 2012-13
- ▶ Availability of skilled technical manpower: More than 100,000 trained students graduating from more than 350 institutes (2012-13)
- ▶ Quality infrastructure: Designated IT parks, with the state-of-the-art technology and ample space in Indore, Bhopal, Jabalpur and Gwalior
- ▶ Regulatory support: The state has well defined incentives with a separate policy for IT/ITeS sector. The state is committed to formulate a separate BPO sector policy in the year 2014
- ▶ Dedicated BPO/BPM policy under approval

### Investment opportunities

- ▶ Software Technology Park, Indore: State-of-the-art facility with ready-to-move-in built up space of 1,00,000 sq. ft.
- ▶ Crystal IT Park, SEZ Indore – Plug and play facility for the IT industry (ready-to-use area of 556,000 sq. ft., allotted area of 200,000 sq. ft.)
- ▶ Hardware & Software Technology Park, Bhopal being developed over 200 acres of land near the airport
- ▶ IT Park, Gwalior - Quality infrastructure built across 50 acres in partnership with the private sector

### Leading Players





# Pharmaceuticals

## Building a healthier state

- ▶ Prominent pharmaceutical hub in India with pharma exports of \$US 99 million (INR 5.48 billion) in 2012-13 and a total investment of \$US 352 million (INR 19.37) billion
- ▶ More than 350 pharmaceutical units in Dewas, Indore, Pithampur, Mandideep and Malanpur
- ▶ Around 200 Ayurvedic and 50 Homeopathic medicine units present in the state
- ▶ Indore houses one of Asia's biggest pharmaceutical trade house "Dawa Bazar"

### Investment opportunities

- ▶ Clinical trial markets and high-end drugs
- ▶ Bulk drug manufacturing, development of medical devices
- ▶ Herbal production and cosmetic units
- ▶ Vaccines and recombinant therapeutics
- ▶ Bioactive therapeutic proteins and Bio-Agri
- ▶ Contract research services
- ▶ Stem cells laboratory
- ▶ Biotechnology park and other infrastructure



### Leading Players





# New Renewable Energy

Energizing state's growth

Madhya Pradesh - A power surplus state

- ▶ Largest Single Destination Solar Power Project (130 MW) in the country is in Neemuch district of Madhya Pradesh
- ▶ Power surplus state with an installed capacity of 14000 MW (March 2014), including 4307 MW under central and 3023 MW under the private sector, and 5572 MW under state utilities
- ▶ Installed capacity of ~868 MW
- ▶ Ultra Mega Solar Power Plant (UMSPP) approved in Rewa & Neemuch

## Investment opportunities

- ▶ Solar power plant
- ▶ Merchant power plants
- ▶ Transmission & distribution metering
- ▶ Switchgear and transformers
- ▶ Wind power plants
- ▶ Small Hydro-Off-grid Solar projects
- ▶ Equipments for wind energy

Renewable Energy	
Source	Potential
Wind	>5000 MW
Biomass	>1200 MW
Small Hydro	>750 MW
Solar	>3000 MW

## Leading Players



# Technical Education & Skill Development

Frontrunner in technical education and skill development initiatives

- ▶ Skill Development Mission constituted under the Chairmanship of Hon'ble Chief Minister
- ▶ Madhya Pradesh Council for Vocational Education & Training (MPCVET) – an agency under the chairmanship of Hon'ble Chief Minister for implementation, certification, coordination and providing overall policy direction for skill development activities in Madhya Pradesh
- ▶ 135 Skill Development Centers (SDCs) set up by the state
- ▶ Investor-friendly Technical Education and Skill Development Policy

## Investment opportunities

- ▶ Industrial training institutes (ITIs) and Skill Development Centers (SDCs) in each block
- ▶ Skill Development Centers under PPP framework
- ▶ Mega ITIs in collaboration with private sector
- ▶ Management of existing ITIs by private training providers
- ▶ New Polytechnic colleges



Leading Players





# Textile

## Weaving the future

House of world-renowned Chanderi, Maheshwari and Bagh handloom products

- ▶ Madhya Pradesh has a strong presence across all the segments of textile industry
- ▶ 5th largest cotton producing state in 2012-13 with 19 lakh bales of production in 2012-13
- ▶ Madhya Pradesh has 45 textile mills that have created 3,10,000 combined jobs
- ▶ The cotton textile mills clusters are located around Indore, Bhopal, Pithampur (Dhar), Khargone, Ujjain, Gwalior, Dewas, Chhindwara, Khandwa and Burhanpur
- ▶ Enabling infrastructure – a textile park is being set up in Chhindwara
- ▶ Availability of low cost and skilled manpower with a rich tradition of knitting & weaving
- ▶ One of the most lucrative package of incentives for the textile industry

### Opportunities

- ▶ Weaving & Knitting
- ▶ Processing of yarns and fabrics like dyeing & printing of fabrics
- ▶ Setting up of apparel and readymade garment units in and around Indore, Bhopal, Jabalpur region and Gwalior (Readymade garment park in Gadaipura)

### Leading Players



# Tourism

## The heart of incredible India

One of the most attractive tourist destinations in India with 60 million domestic tourist arrivals in 2012

- ▶ Madhya Pradesh is one of the best rated tourist destinations in India, and has received various national and international accolades including:
  - Today's Traveller Awards, 2013 – Most Progressive State under the Domestic Tourism Category
  - PATWA awards at ITB Berlin, 2013 – Best Heritage State
  - Lonely Planet Awards at Mumbai, 2013 – Best Destination for Wildlife (India)
  - Best TV Ad - National Award
- ▶ Madhya Pradesh is home to world heritage sites such as Sanchi, Khajuraho, Bhimbetka
- ▶ Madhya Pradesh is the Tiger State of India with four Project Tiger Reserves and 9 National Parks
- ▶ Expo destination – Madhya Pradesh is an ideal destination for holding world-class Expos. A 102 acres expo-center is being built in Gwalior on the lines of Pragati Maidan, New Delhi
- ▶ Ease of tourism for foreign tourists – Madhya Pradesh Tourism collaborates with tour operators to provide hassle-free and comfortable tourism experience to foreign tourists

### Investment opportunities

- ▶ Village tourism
- ▶ Wellness tourism
- ▶ Water tourism
- ▶ MICE tourism
- ▶ Film tourism
- ▶ Eco tourism
- ▶ Religious fares
- ▶ Luxury and business hotels for MICE tourism

#### Leading Players





# Urban Development

Building world-class urban centres

- ▶ 28% of population in Madhya Pradesh resides in key urban centres such as Bhopal, Indore, Gwalior, Jabalpur and Ujjain
- ▶ The proactive Government of Madhya Pradesh has undertaken a number of Infrastructure development initiatives in collaboration with Government of India and donor agencies. Several awards testify to this:
  - National E-Governance Award for automated building permission approval system in Indore Municipal Corporation (Department of Administrative Reforms and Public Grievance, Government of India)
  - Best Practices Award 2014 for Integration of City Bus Operation with Bus Rapid Transit System of Bhopal (HUDCO)
  - Best Practices Award 2014 for Integrated Urban Sanitation Program (HUDCO)
  - Best Practices Award 2014 for Environment Management Conservation and Green Building in Nagar Parishad Gautampura for Water conservation (HUDCO)
  - Awards for outstanding contribution in the field of Housing and Development to Municipality Jabalpur under BSUP scheme for Innovative Ideas (HUDCO)

## Investment opportunities

- ▶ Bhopal and Indore Metro Rail project
- ▶ Operation of Public Transport modes
- ▶ Super Corridor project in Indore
- ▶ Urban densification project in Indore
- ▶ Freight Terminal in district headquarters on PPP basis
- ▶ Bus Depots, Terminal and Bus Stops and Shelters on PPP Basis
- ▶ Multi-Level Parking in major cities on PPP Basis
- ▶ Pedestrian and Non-Motor Transport Infrastructure like Sky Walks, Foot Over Bridges etc.
- ▶ Ring Roads and other related infrastructure on PPP Basis
- ▶ Water supply projects sanctioned in 95 towns
- ▶ Water supply projects proposed in 142 towns
- ▶ Mid-term service contracts for operations and maintenance
- ▶ Waste water collection/treatment in 11 religious/tourist towns
- ▶ Integrated Municipal Solid Waste Management (MSWM) project in 3 clusters i.e. Dewas, Sagar & Katni
- ▶ 22 regional MSW cluster development
- ▶ 500 thousand dwelling units planned for development in the urban areas for the next 5 years, out of which 250 thousand dwelling units are planned to be developed through private sector participation
- ▶ Integrated township by Bhopal Development Authority

## Leading Players

