NEW INDIA

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NATIONAL INVESTMENT PROMOTION
& FACILITATION AGENCY

BRICS INFRASTRUCTURE INVESTMENT FORUM

25th November 2020

Top market across all segments

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2nd largest smartphone market with **150+** Mn shipments, growing at **11%**

World's 2nd largest steel producer with **140+** MT capacity

World's **4th largest oil refiner, 4.5% CAGR** petrochemical consumption (2014-20). Investment of **$118 bn** by 2024

4+ Mn passenger & commercial vehicles sold annually, growing at **3%**

Cargo traffic is expected to rise to **2500 MT by 2024-25** from 1,072.23 MT in 2015-16

Fastest growing E-commerce market at **63% CAGR, USD 85 Bn** by 2023

3rd largest domestic aviation market. **340 Mn+** passengers growing at **11%,**

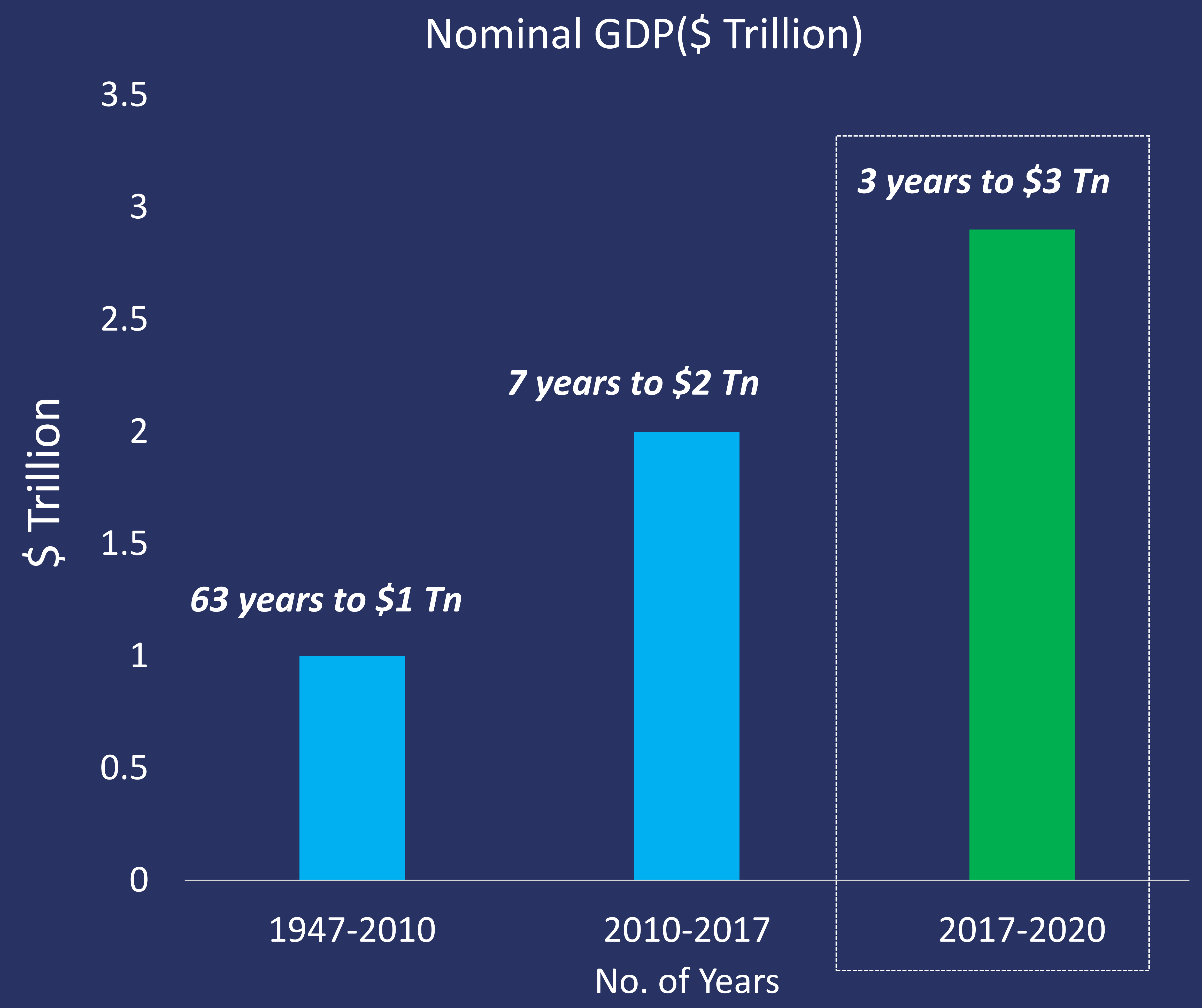
World's **6th largest producer** of chemicals. The Indian chemicals industry is projected to reach **$304 bn from $178bn by 2025**

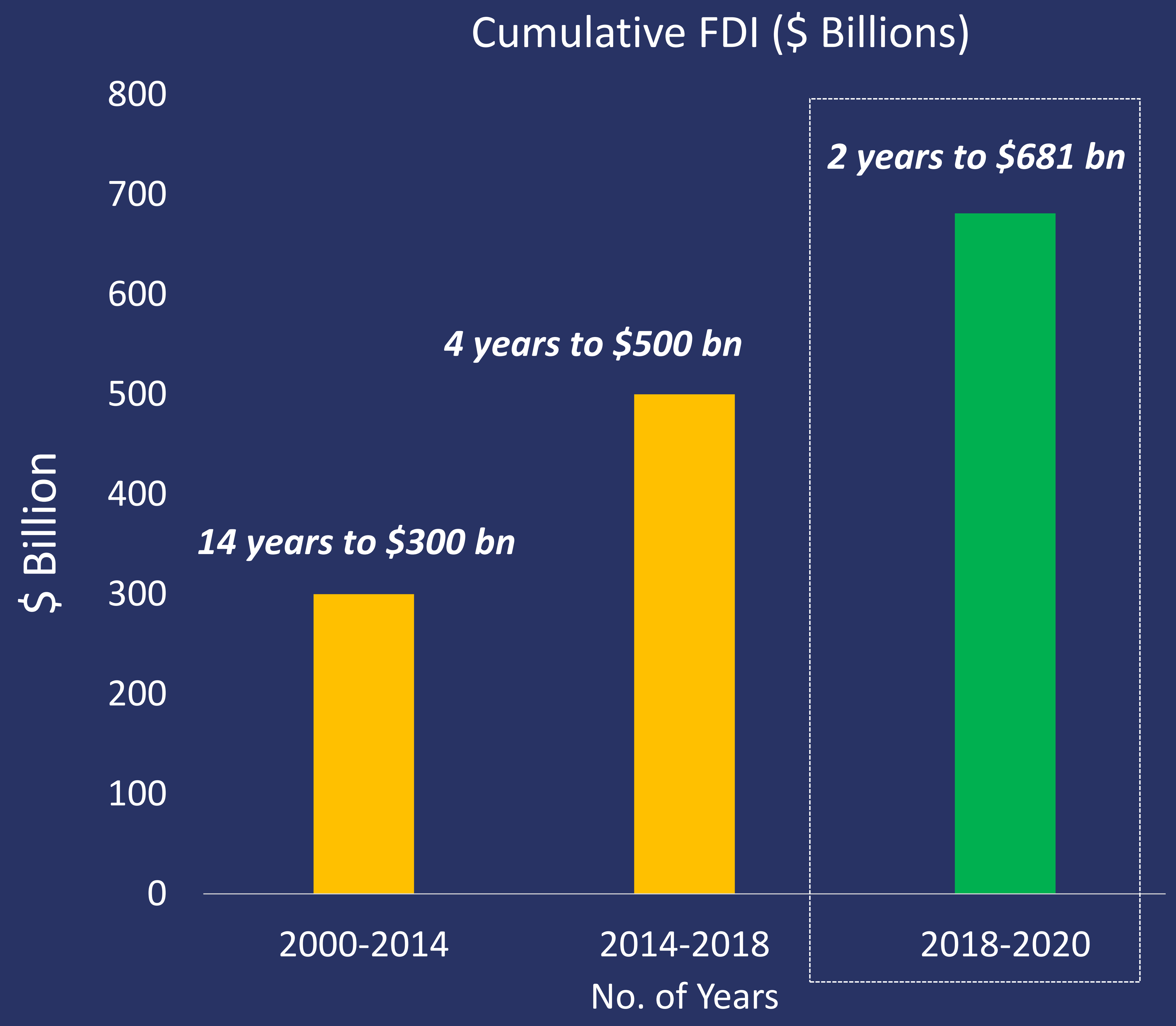
Durables growing at **3X** global growth at **18%,** Current market to double by 2023

5th largest installed capacity of renewable energy in the world

6th Largest Food and Grocery Market in the World

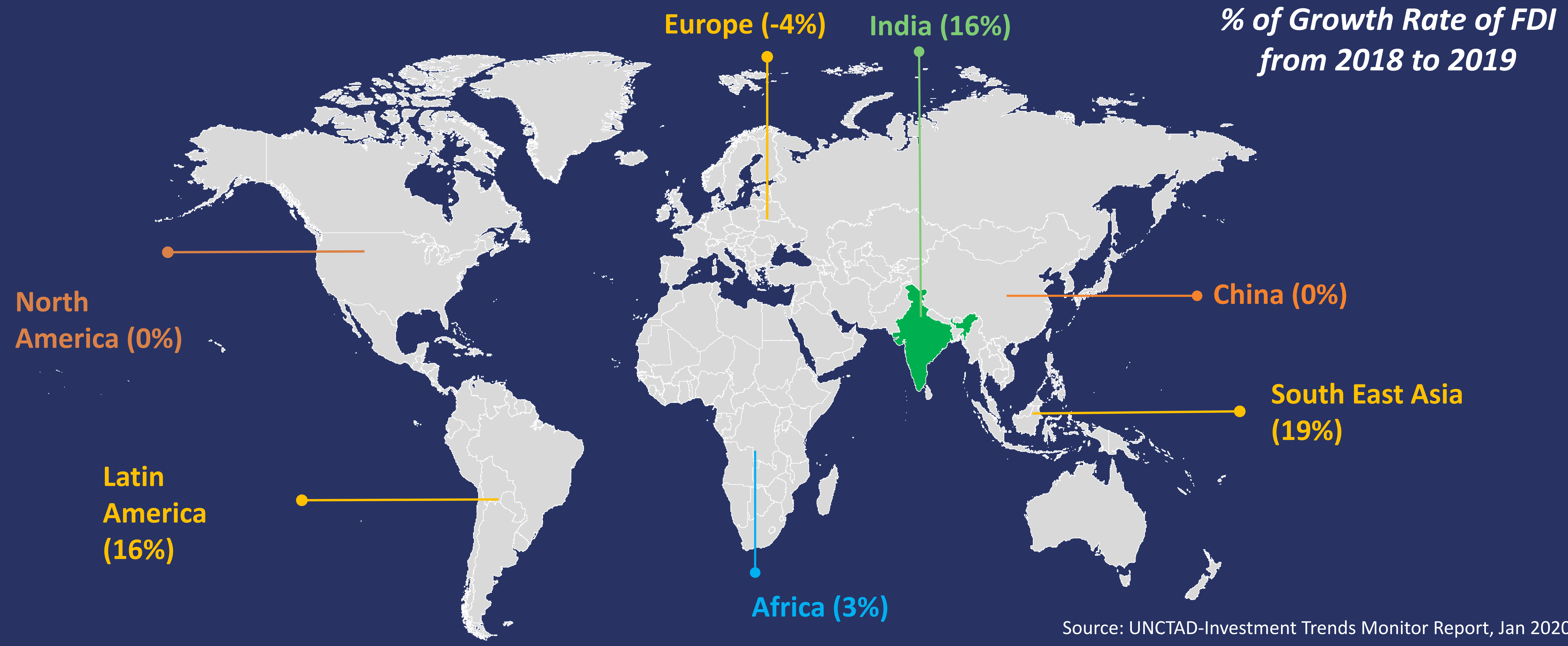
Accelerated growth in India





India: Top destination for global investors

While Global FDI fell by 1% last year, FDI into India rose by 16%



Source: UNCTAD-Investment Trends Monitor Report, Jan 2020

India poised for resurgence post COVID-19

Green shoots already starting to appear

13%	more *kharif* sowing as compared to last year
70%	Pre-COVID19 production levels for 2-wheelers reached
100%	Pre-COVID19 lockdown levels reached for exports
100%	Pre-COVID19 lockdown levels reached for digital payments and toll collections

India: Top destination for global investors

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PARAMETERS / RANKS	INDIA	CHINA	INDONESIA	VIETNAM	MALAYSIA	PHILIPPINES	THAILAND
Political stability	1	2	4	4	3	7	6
Currency stability	1	4	3	7	2	6	5
High quality products	1	4	2	7	3	6	5
Anti-corruption	1	3	4	7	2	6	5
Low cost of production	1	5	3	2	4	7	6
Strategic location	1	5	3	6	1	4	7
Respect for IPR	1	7	3	6	2	4	5
Infrastructure	5	2	3	7	1	4	6
Tax privileges	2	5	3	4	1	7	6
Quality of living for investors	3	5	4	7	1	6	2

Source : Bloomberg Media Group : Nation Brand Tracker 2018

Infrastructure Development

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Infrastructure Vision 2025

	2019	2025
Road Sector	132,000 Km	199,000 Km
Energy Capacity	356 GW	619 GW
Airport Privatized (PPP)	6 Airports	30-35 Airports
Digital Infrastructure – Internet Penetration	40%	80%
Railways – Share in freight traffic	33%	40%+

NIP

$1.4 Trillion investment between 2019 and 2025 under National Infrastructure Pipeline (NIP)

21% **Share of private investment in NIP**

Sectoral investments under the NIP

- **24%** Energy
- **13%** Railways
- **8%** Irrigation
- **3%** Digital
- **3%** Industrial
- **19%** Roads
- **16%** Urban
- **8%** Rural
- **3%** Social
- **3%** Others

Roads: A Vast Network of National Highways

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2nd Largest road network with over 5.5 Mn Kms (2016)

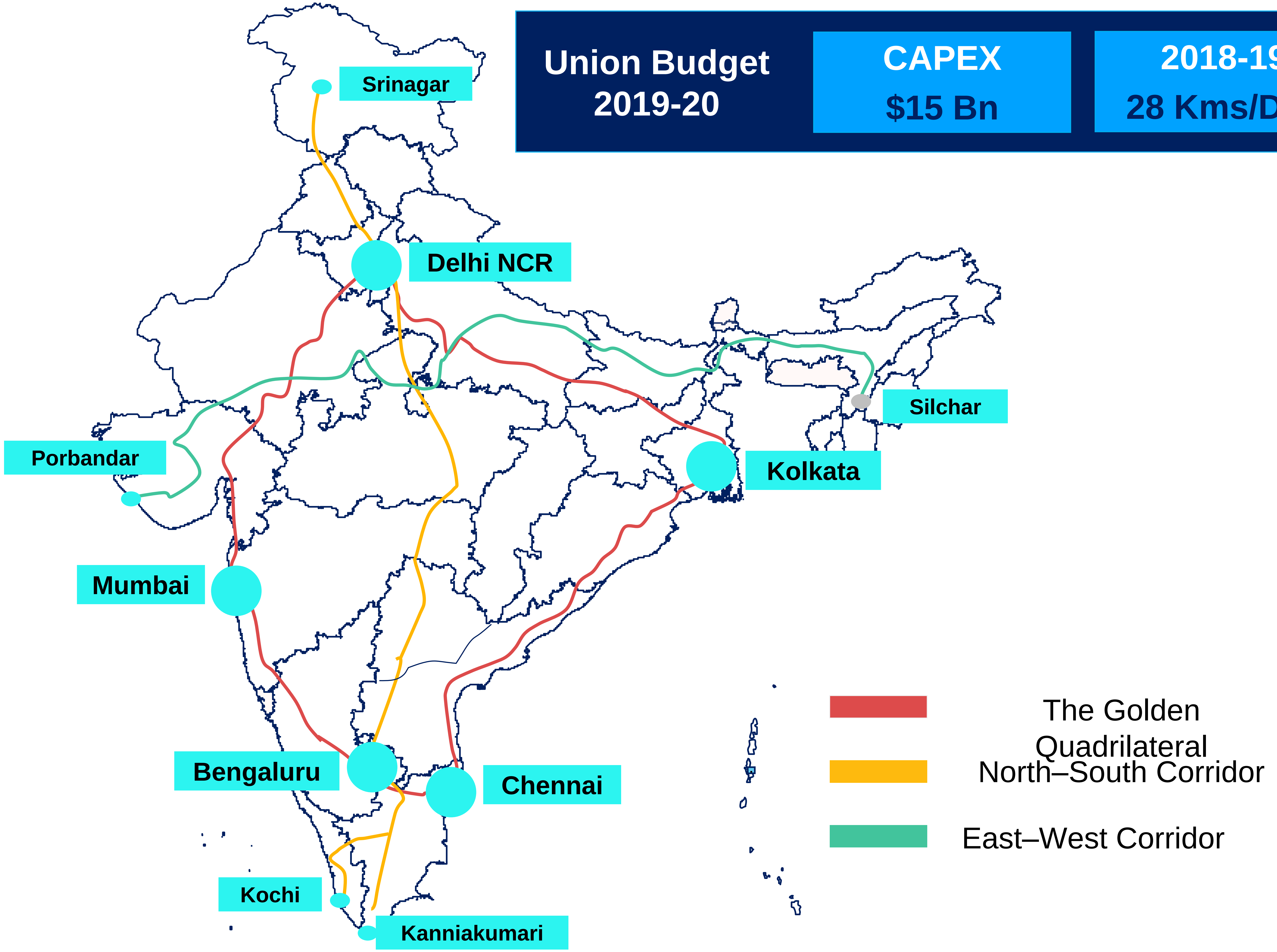
National Highways 2% of road network (~1,20,000 kms length)

65% of freight and 80% passenger traffic

Top Recipient of PPP funding in 2008-12

1 in PPP Operational Maturity (ADB Infrascope 2014)

Union Budget 2019-20	CAPEX	2018-19
	$15 Bn	28 Kms/Day



Bharatmala Project

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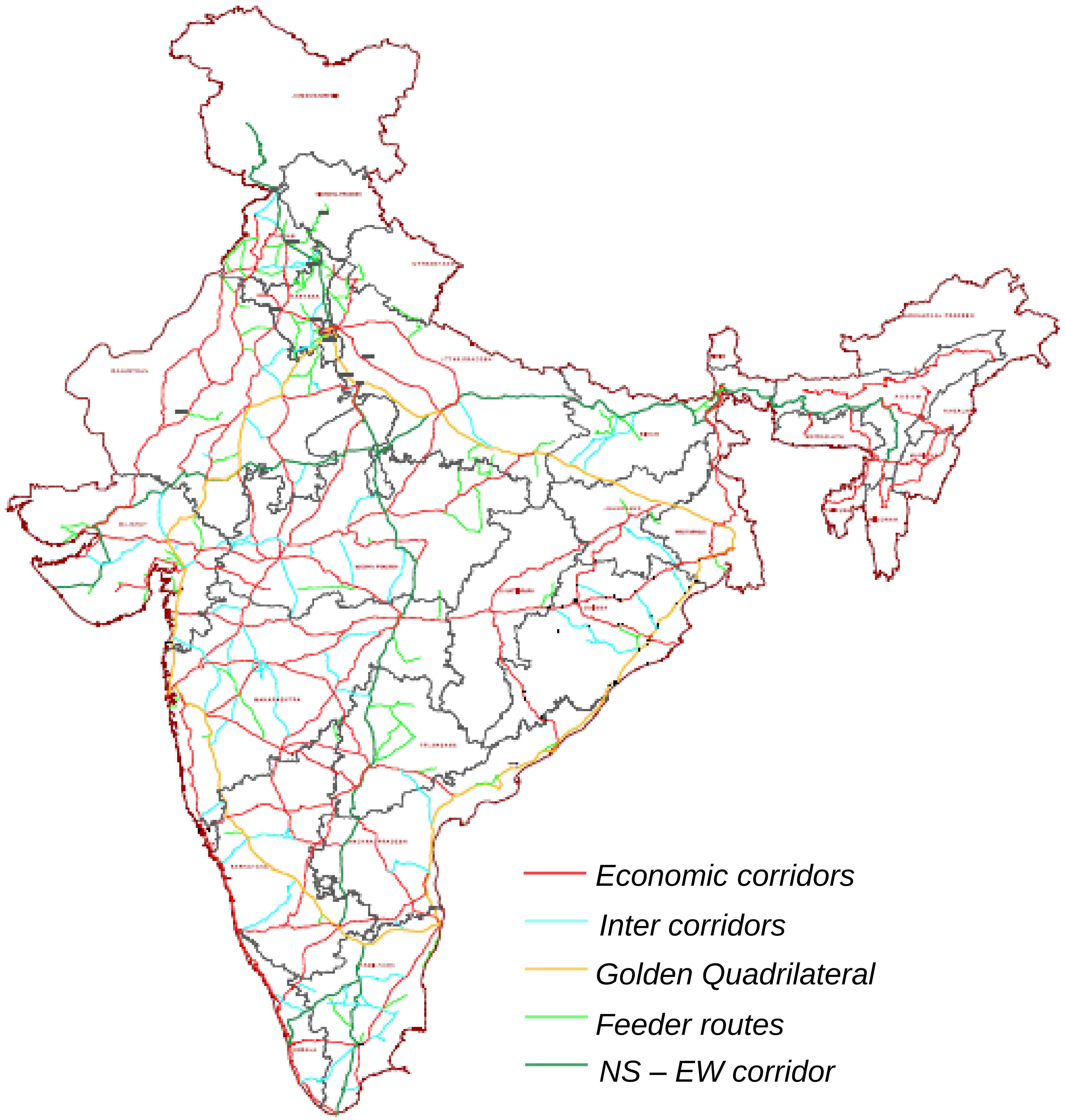

Total Length	66,100 km
Phase - I	24,800 km
Estimated Investment	$100 Bn
Status	Under Award
Award Date	Ongoing

Major Components

13,100 km National Corridors	26,200 km Economic Corridors	15,500 km Feeder Routes
5,300 km International Connectivity	4,100 km Port Connectivity	1900 km Expressways

Live Projects: 35 Multi Modal Logistics Parks

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Growth Drivers

MAKE IN INDIA

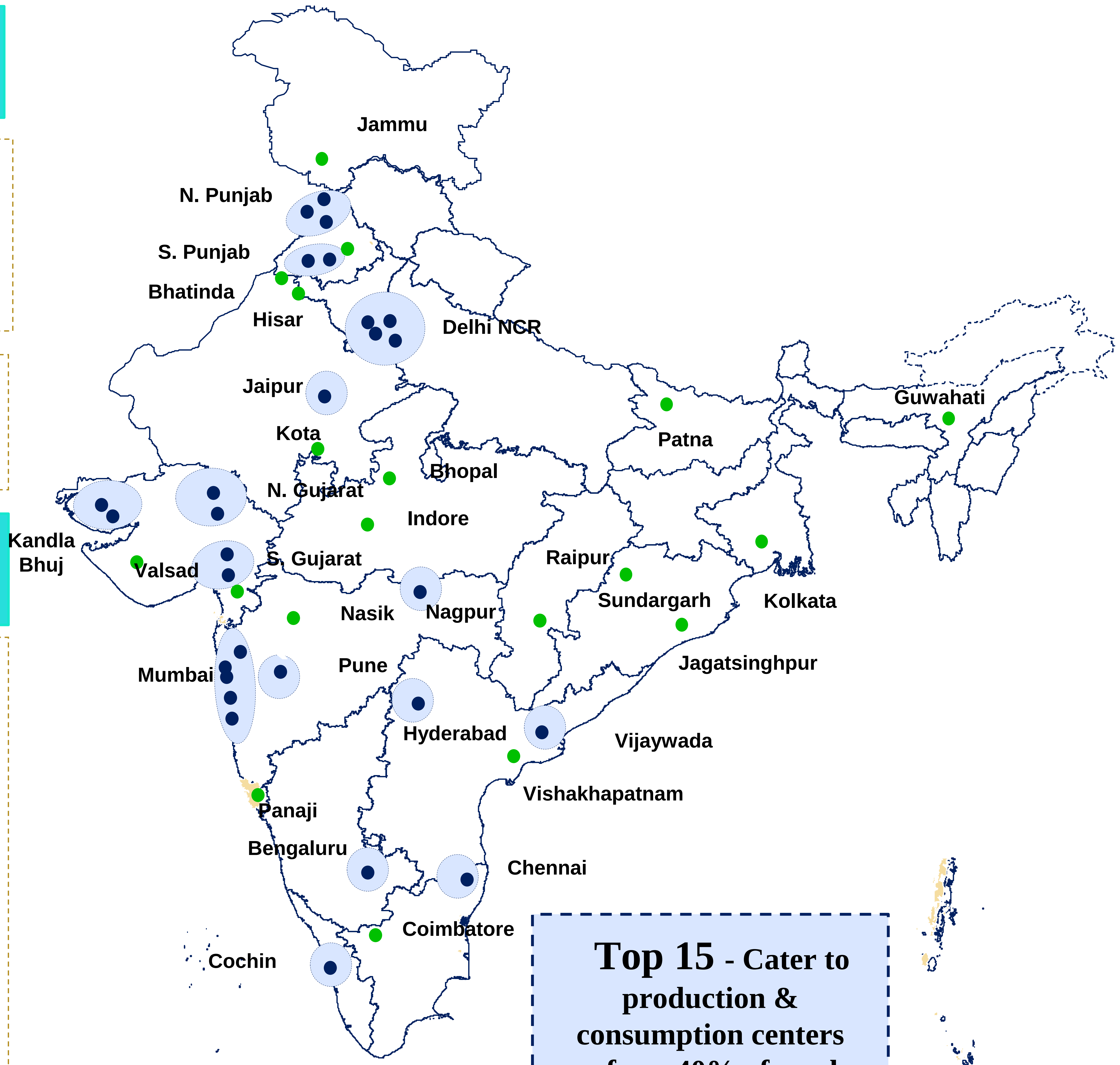
14%
Cost of Logistics

GST
GOODS AND SERVICES TAX

$215 Bn
Logistics Market Size in 2 years

Government Support

- Large land parcels (100 – 500 acres)
- Long term concessions (30 – 60 years)
- Trunk Infrastructure (Road, Railway, Airport & Waterway connectivity)
- Infrastructure Status – Cheaper credit & Tax holiday



Top 15 - Cater to production & consumption centers for ~ 40% of road freight.

Railways

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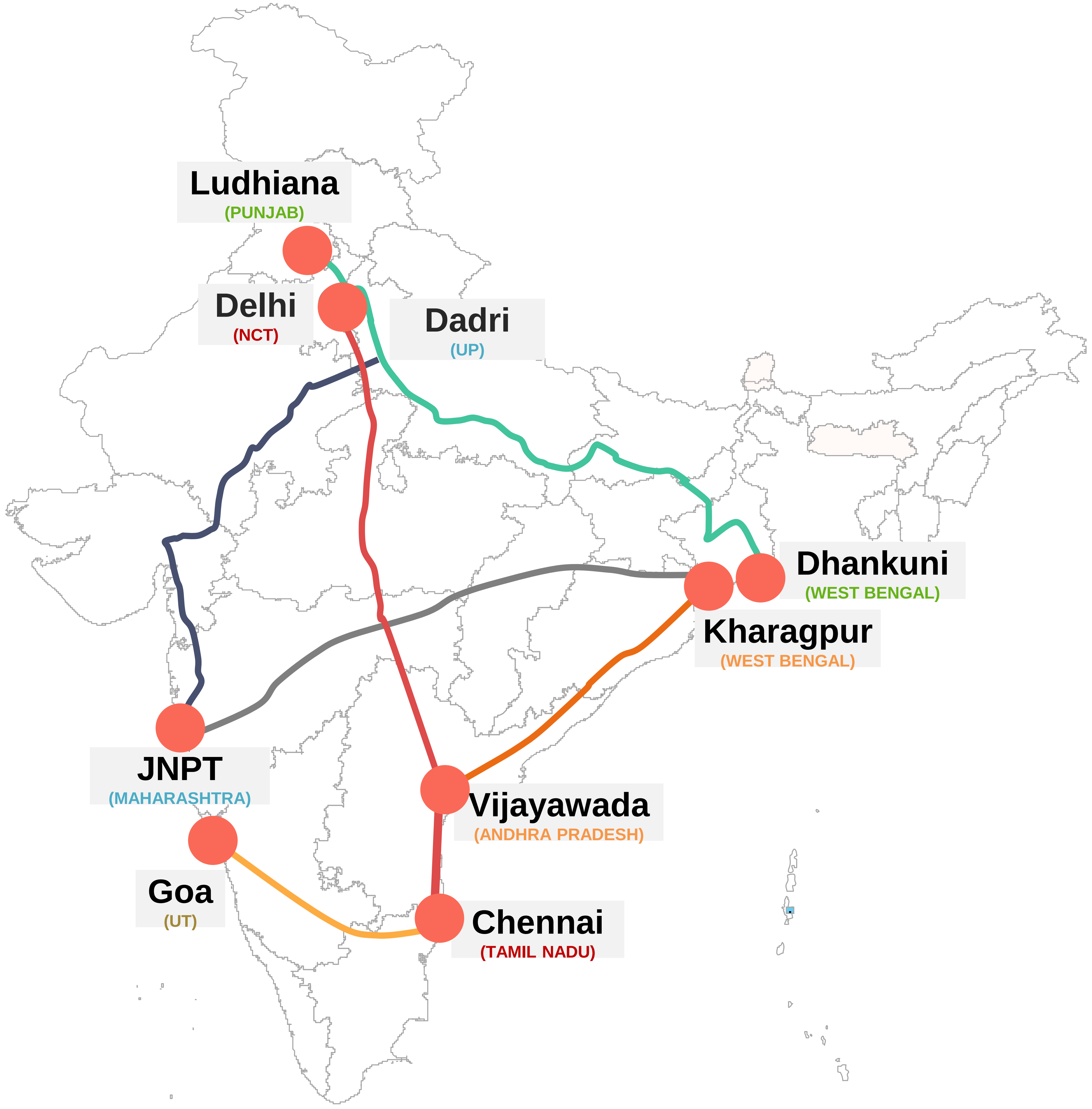


Under Implementation

Eastern DFC	1,840 km
Western DFC	1,504 km

In-Principal Approval

Southern DFC	899 km

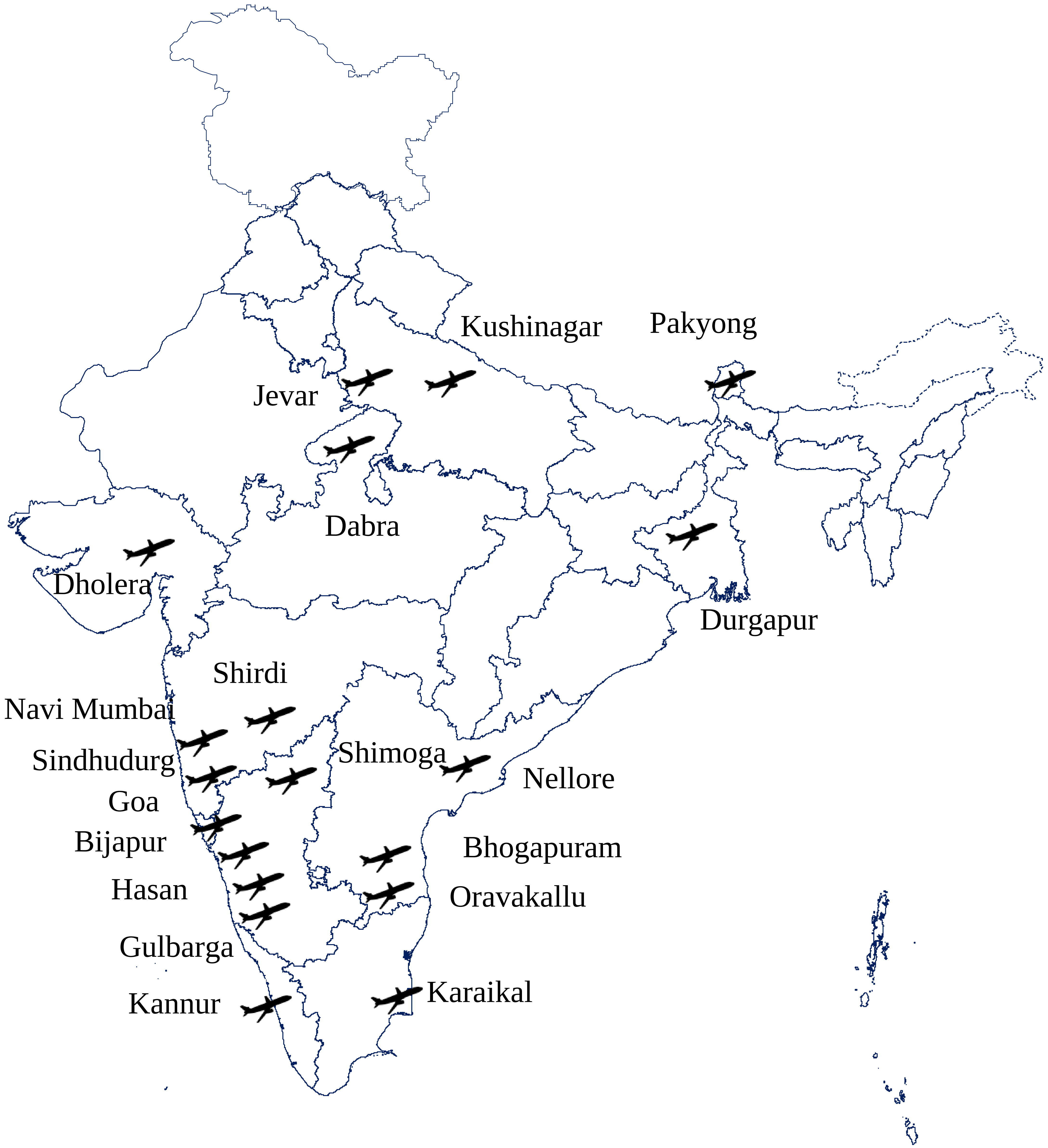
Planning Stage

North–South DFC	2,343 km
East–West DFC	2,330 km
East Coast DFC	1,100 km

High Speed Railways (HSR)	1 HSR under construction. 5 more under planning
Stations	600 stations re-development
Electrification	100% electrification
Port connectivity	25+ port rail connectivity projects
Dedicated Freight Corridors	3,343Km greenfield DFC under construction 6,779Km more to be developed

Union Budget 2019-20	CAPEX	Expansion	Gauge Conv.	Electrification
	$24 Bn	18,000 km	5,000 km	27,000 km

Live Projects: Greenfield Airports



THE OPPORTUNITY

S. No	Airport	State	Amount (Mn $)
1	Mopa	Goa	$477 Mn
2	Navi Mumbai	Maharashtra	$2570 Mn
3	Sindhudurg	Maharashtra	$80 Mn
4	Shirdi	Maharashtra	$49 Mn
5	Bijapur	Karnataka	$23 Mn
6	Gulbarga	Karnataka	$2 Mn
7	Hasan	Karnataka	$91 Mn
8	Shimoga	Karnataka	$6 Mn
9	Kannur	Kerala	$291 Mn
10	Durgapur	West Bengal	$103 Mn
11	Dabra	Madhya Pradesh	$31 Mn
12	Pakyong	Sikkim	$85 Mn
13	Karaikal	Puducherry	$26 Mn
14	Kushinagar	Uttar Pradesh	$69 Mn
15	Dholera	Gujarat	$263 Mn
16	Dagadarthi Mendal	Andhra Pradesh	$45 Mn
17	Bhogapuram	Andhra Pradesh	$348 Mn
18	Oravakallu	Andhra Pradesh	$31 Mn
19	Jevar	Uttar Pradesh	$3000 Mn
	Total		$7.6 Bn

Smart Cities: Opportunities across the spectrum

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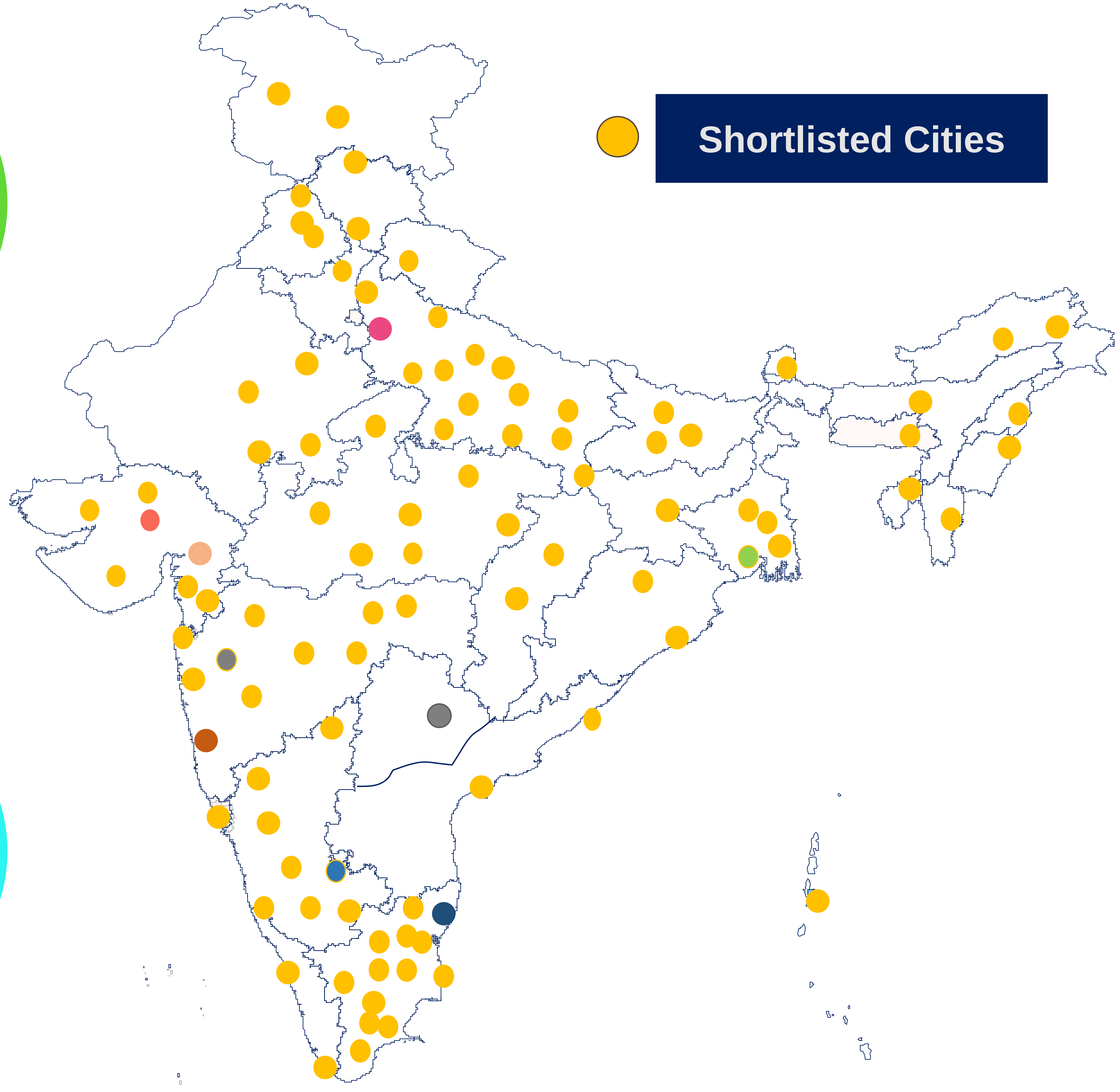
100
SMART CITIES
By 2022

99
CITIES
Already Shorlisted

$32 bn
Budgetary Outlay



Shortlisted Cities

10 megacities in india

	Population, 2030* Million	Per Capita GDP, 2030*, $000s
Mumbai	33.0	8.0
Delhi NCT	25.9	11.4
Kolkata	22.9	7.4
Chennai	11.0	6.6
Bengaluru	10.1	12.6
Pune	10.0	7.6
Hyderabad	9.8	6.8
Ahmedabad	8.4	8.1
Surat	7.4	7.2
Jaipur	5.4	4.5

Mass Rapid Transit System - Overview

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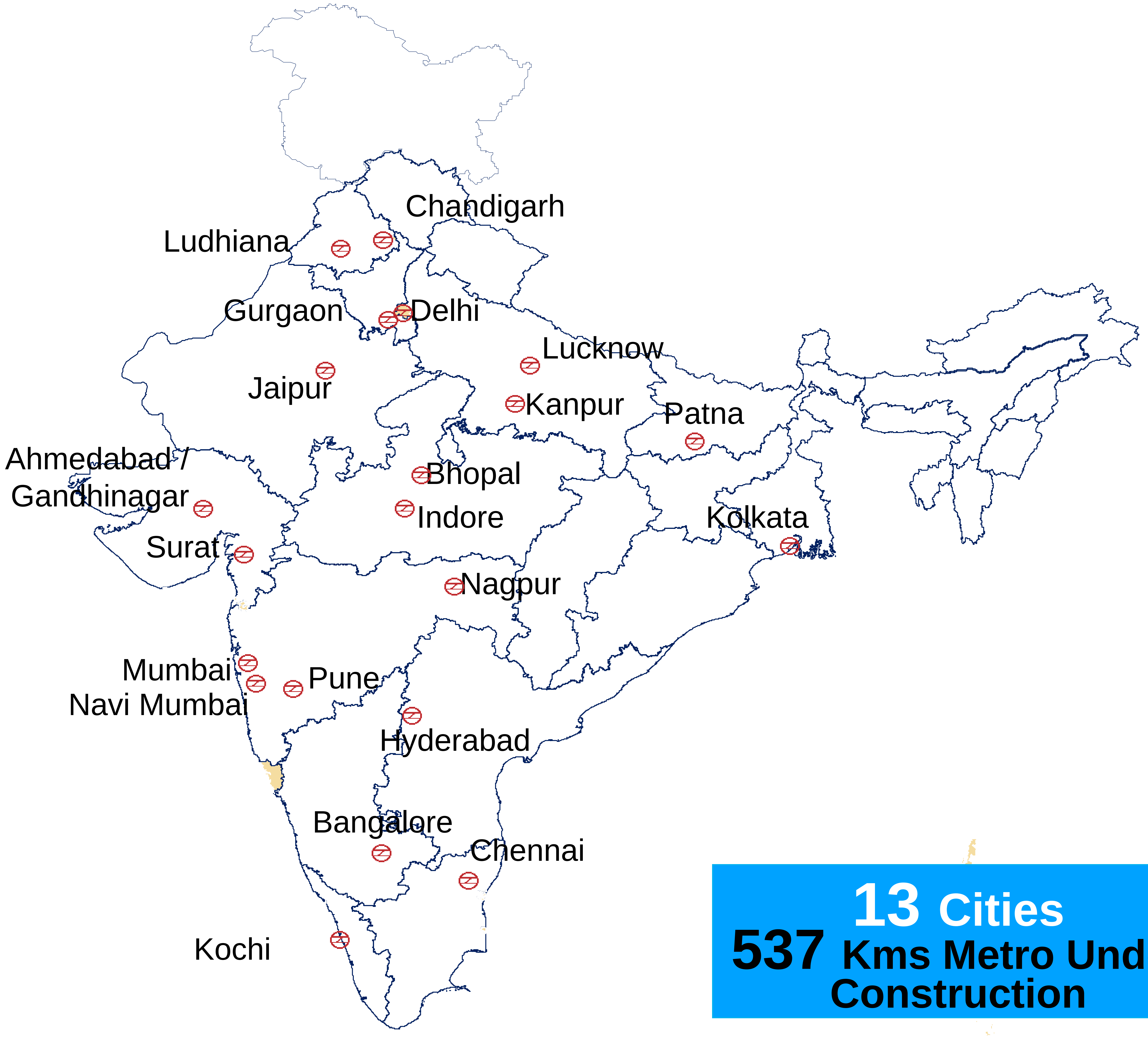


THE OPPORTUNITY

$1.2 Tn	**Capital investment needed in cities**
7400 kms	**Metros to be constructed** (20 times capacity added in the past decade)
590 Mn	**People to live in cities** (nearly twice the population of US today)
68 cities	**With population of 1 million+** (up from 42 today. Europe has 35)
50+	**Metro / MRTS projects**

13 Cities
537 Kms Metro Under Construction

13 Cities
595 kms Metro Under Planning

8 Cities
370 Kms Operational Metro Systems

RENEWABLE ENERGY IN INDIA

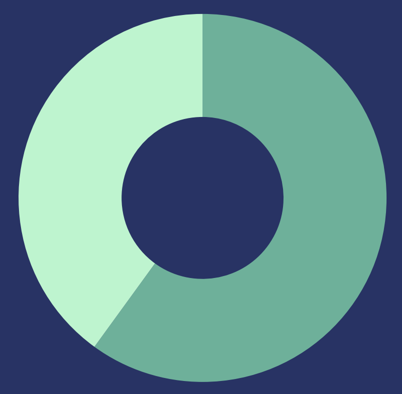
89 GW INSTALLED
450 GW TARGET (2030)
1000+ GW POTENTIAL

7th
ATTRACTIVENESS INDEX (EY, 2020)

5th
LARGEST INSTALLED CAPACITY GLOBALLY
4th Largest of Wind
5th Largest of Solar

GOVERNMENT COMMITMENTS BY 2030


Reduce Emissions Intensity by 33-35%


40% of Non-Fossil Fuels in Energy Mix

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World's most awarded IPA

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GOVERNMENT

Centre / States

Foreign Missions / Agencies

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INDUSTRY

Associations / Corporates

Professional Advisors / Academia

Awareness & Engagement	Business Advisory	Strategy & Implementation	Investor Aftercare	Long term partnership
Opportunity Assessment	Partner / Location Search Market Strategy	Regulatory Clearances Policy Guidance	Issue Redressal	Continuous Engagements

Thank you

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