

# INVEST PUNJAB

**BUSINESS FIRST**

A COMPENDIUM OF  
INVESTMENT OPPORTUNITIES





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**PUNJAB**  
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# Contents

## INVEST PUNJAB BUSINESS FIRST

### Published By

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egovonline 

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eGov Magazine 

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## MESSAGE

Punjab's economic and industrial leadership is attributed to the state's enterprising people, proactive governance, and a skilled and committed workforce. It is a matter of joy that Punjab has always been a preferred destination for businesses due to its state-of-the-art infrastructure, prosperous economy, robust industrial ecosystem, attractive incentives, abundant talent, and progressive government policies.

The state has many advantages for investors - business-friendly policies, 24x7 power supply, a robust network of international and domestic airports, state-wide water grid, roadways and railways and presence of premier management and technical institutions and universities.

Progressive Punjab Investment Summit 2019 is our sincere effort to provide a platform, where you can explore unlimited business opportunities that the state has to offer and interact with key policymakers and business luminaries from India and across the world.

The Industrial Coffee Table Book published on this occasion is an initiative of Punjab Bureau of Investment Promotion and Elets Technomedia Pvt Ltd to compile success stories of key projects. I am sure that this souvenir will be useful for investors, academicians, students and all stakeholders in exploring the inclusive development of Punjab and the country as a whole.

I wish the participants all the best!

**Captain Amarinder Singh**  
Chief Minister, Punjab





## MESSAGE

Punjab is a land known for its enterprising and hard-working people. The state offers excellent infrastructure to industries, rich and abundant human capital, access to large markets, and is an ideal place to work in.

We envision ourselves as a progressive state that keeps pace with the world by leveraging its core strengths and focusing on skills, creating jobs and increasing productivity. Our endeavor has been focused on making Punjab the most preferred investment destination in India through transparent governance, effective administration, investor-friendly policies, and superior infrastructure.

The enterprising spirit of the state is its key advantage providing entrepreneurs a platform to grow and prosper. The Government of Punjab is extremely keen to follow a proactive approach to further strengthen this relationship by improving the 'Ease of Doing Business' environment in the state to attract industries.

With 'Progressive Punjab' we wish to fulfill our goals by focusing on skills, increasing productivity and creating jobs for all and usher in the era of Industry 4.0 in the state.

I congratulate the Punjab Bureau of Investment Promotion (PBIP) and Elets Technomedia Pvt Ltd for bringing out this Industrial Coffee Table Book, which will trace the exponential increase in the span and outreach of 'Progressive Punjab,' as well as the growth of Punjab over the years.



**Vini Mahajan, IAS**

Additional Chief Secretary  
Department of Investment Promotion  
Industries & Commerce, IT, Governance  
Reforms and Removal of Grievances  
Government of Punjab



## MESSAGE

It is a pleasure and privilege to extend a warm welcome to all the participants at the Progressive Punjab Investors Summit 2019, scheduled on December 5-6, 2019 at Indian School of Business, Mohali. The Summit is yet another major milestone for the Government of Punjab as it provides for us to celebrate Punjab's huge potential as a global investment destination and contribute immensely towards India's economic growth.

Progressive Punjab comes at a time when the Government of Punjab has initiated investor-friendly policies to position and promote the state as a hub for developing cutting-edge technologies to take forward its vision of Industry 4.0. Riding on the back of a robust infrastructure and policy framework, the investment grounded in the state in last 2.5 years has already surpassed Rs 50,000 crores. This platform, I am sure, will provide an opportunity to all stakeholders to network and initiate dialogues for action to further push the investments in the state.

As a platform, Progressive Punjab has always strived to achieve excellence in showcasing various facets of the 'Land of Five Rivers'. The 2019 edition of the Summit focuses on Building Partnerships for Inclusive Growth by Integrating Punjab's MSME sector into the global value chain. It is well-represented by participation from MSMEs, investors, manufacturers, software service providers, innovators, startups and experts from India and overseas. With key stakeholders from industry, government, associations, academia, etc. on board, I am sure, Progressive Punjab will provide the right opportunity and help the industry to move forward in the right direction.

This industrial coffee table book being brought on this occasion would be a compendium of the success stories and opportunities that you can seek and explore in Punjab.

Progressive Punjab has been a journey of innovation to provide a perfect platform to link businesses, governments and ideas together. This edition will further perpetuate the idea of celebrating Punjab's unique place in India as the 'Land of Unlimited Opportunities', and we are committed to this vision.

I wish the participants and delegates a great success.

**Rajat Agarwal, IAS**


Chief Executive Officer

Punjab Bureau of Investment Promotion (PBIP)









# PUNJAB

THE LAND OF OPPORTUNITIES

## POWERHOUSE OF NEW INDIA

Located in Northwestern India, Punjab is one of the most prosperous States of India with a GDP of USD 84 billion growing at a rate of 8.9% at current market prices. Punjab has one of the best infrastructures, connectivity networks, human capital and enterprising people. The contribution of the primary, secondary and tertiary sector to the State GSVA were 28.52%, 24.92% and 46.50% (at current prices), respectively. The State has nearly 1,94,000 small scale industrial units in addition to 586 large and medium units. The state has 19,039 registered factories employing 7,07,819 workers. Punjab is also home to 16 universities, which produce quality human resources that are employable across the world.



## STATE SNAPSHOT

- **State Capital** - Chandigarh (Union Territory)
- **Geographical Coordinates** - Latitudes 29.30° North to 32.32° North and Longitudes 73.55° East to 76.50° East
- **Geographical Division** - Majha, Doaba and Malwa
- **Average Elevation** - 300 meters above sea level
- **Rivers** - Ravi, Beas and Sutlej
- **Area** - 50,362 sq km
- **Population** - 2.8 crore approx
- **Religions** - Sikhism, Hinduism, Islam, Christianity, Buddhism and Jainism
- **Languages** - Punjabi (official language), Hindi and English
- **Literacy** - 76.7%
- **No. of Districts** - 22
- **Major Cities** - Mohali, Ludhiana, Amritsar, Patiala and Jalandhar
- **Major Industries** - Manufacturing of Scientific Instruments, Agro-based, Chemical, Electrical Goods, Financial Services, Machine Tools, Textiles, sewing machines, etc
- **Area Under Cultivation** - 84%
- **Rail Network** - 2,829 Km
- **Road Network** - 72,212 Km
- **Airports** - Mohali, Amritsar, Bathinda, Ludhiana, Jalandhar and Pathankot
- **Tele-density** - 124.14% (Ranked 3rd in India)
- **Power** - 13,432 MW (Installed Capacity)
- **World Bank 'Ease of Setting Up A Business' Rank** - No. 1 among Indian states



## ENDLESS ENTERPRISE

The industrial city of Ludhiana is the most populous district in Punjab with a population of around 35 lakh, followed by Amritsar, Jalandhar and Patiala. The State has 30% of its population working in primary, secondary and tertiary sectors of the economy (84,50,936 main workers and 14,46,426 marginal workers as per 2011 Census). There are 43,142 workers per lakh of population.



# ADVANTAGE PUNJAB





## INDUSTRIES' DELIGHT

Known as the 'Granary of India', Punjab occupies 15% of India's land area and contributes 3% to the country's GDP. The State offers abundant quality power with low tariffs, which is uniform for all the industries setting up their bases here. Easy access to 25 percent of the country's consumer base and close proximity to the National Capital New Delhi and the Central Asian market give the state a unique advantage. No wonders, many global giants like Nestle, Isuzu, and Walmart have chosen to set up their units here.





## KEY INSIGHTS

- Houses World's Biggest Tractor Manufacturing Company
- Biggest Bicycle & Bicycle component Manufacturing State
- Biggest Hosiery/Woolen Manufacturing State
- 100% Electrification with lowest T&D losses in India at 13.6%
- Peaceful labour relations with competitive monthly wages of USD 127.13. No lockouts and strikes
- Premium educational institutes producing skilled human capital
- 100% Road Connectivity with 4/6 lane highways
- International Airports - Mohali and Amritsar, upcoming airport at Ludhiana
- Punjab is ranked best in India on Safety & Security of Cargo Movement and is ranked 2nd in Ease of Logistics in India with land & railway port at Amritsar, multimodal logistics parks in Ludhiana, and 5 ICDs at Amritsar, Jalandhar, Ludhiana, Bathinda and Derabassi
- Dedicated Freight Corridors [Eastern & Western] (Intersection Point - Dadri)
- Punjab Bureau of Investment Promotion is the one-stop investment promotion agency of Punjab and acts as the sole regulator of at least 23 departments offering digital approvals and fiscal incentive approvals. It has a dedicated relationship officer to help investors wade through regulatory formalities
- With low crime rates, Punjab is one of the safest places in India to do business. The state has recorded lowest share of cognizable crime amongst major industrialised states of India





## NATURAL RESOURCES

Punjab is endowed with forests, abundant water bodies and fertile land resources. Agriculture is the mainstay of Punjab. The state has a vast expanse of flat alluvial land while the Shivalik hills in the north have fluvial carvings and deposits of the three rivers, namely, Ravi, Beas and Satluj, which flow through central Punjab, and the sand dunes in the southwest.







## IRRIGATION SYSTEM

Punjab has a distribution network of 1.45 lakh km of canals including branch canals, and minor distributaries and one lakh km of field canals or water courses. Rivers Sutlej, Ravi and Beas are the main sources of water for canal irrigation. Storage basins have been constructed over these rivers such as Bhakra Dam on the Sutlej, Beas Dam on the river Beas at Pong and Thein Dam on the Ravi. Besides, Sutlej, Beas and Ravi have also been interlinked with each other. The Bhakra canal system and the Yamuna canal system are also interlinked to regulate the water flow. The three rivers flowing through the state have a water potential of about 20.06 maf.





RENEWABLE  
RESOURCES

Hydro-energy is the most important source of renewable energy in the state. Another form of conventional renewable energy used in the state is bio-mass in the form of fuel wood, agro-waste and cattle-dung cakes.

Punjab has approximately 293 days/year of bright sunshine. This provides a large base for tapping natural energy resources. Wind is also another important source of non-conventional energy. Utilization of wind energy had been in practice in rural areas of the state before the 1970s for winnowing threshed crops, which has now been substituted by machines.





# POWER

Punjab is a power surplus state with a total installed capacity of 13,432 MW available to all the industries at Rs 5/unit. The state has excellent distribution network which includes 66 KVA sub-stations at every 10 km. It has the country's first ever 400 KVA ring main system covering the entire state.

The state has a cumulative installed renewable energy capacity of 1,422 MW with 475 MW of Biomass power and over 800 MW of solar power.



## The Power of One

**One** company delivers solutions by offering the widest menu:

- Complete power plant EPC
- Supercritical BTG island
- Supercritical Boiler island
- Supercritical Turbine Generator island
- Complete BoP
- Air Pollution Control systems

**One** company seamlessly weaves in-house capabilities with global alliances through technology leaders like Mitsubishi Hitachi Power Systems, Sargent & Lundy, Howden, Chiyoda, Clyde Bergemann and CMI, encompassing the entire spectrum from engineering, manufacturing to life cycle services.

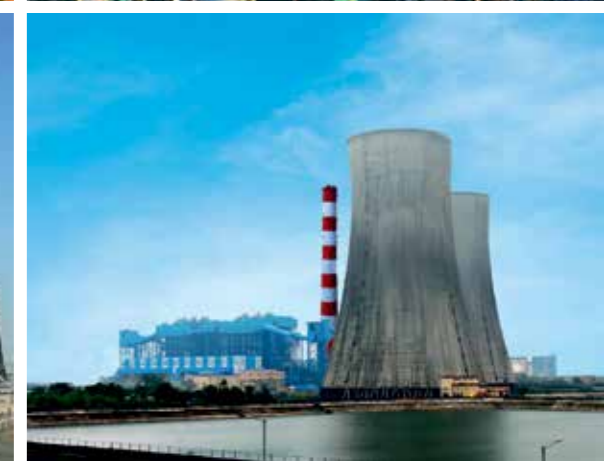
**One** company has one of the world's largest manufacturing facilities for almost every product in ultra-supercritical and supercritical thermal power generation of 5,000 MW per annum at one location, Hazira (Gujarat) - a waterfront facility offering unmatched logistical advantages.

**One** company has overwhelming construction muscle, engaged in thermal power plant construction for over 50 years. The Power Project Management Services team today is 3,800-strong.

**One** company's track record is in itself a record: The 2x700 MW supercritical thermal power plant in Punjab, built on full EPC basis, is operating successfully for over five years. Five supercritical thermal power plants - 2x660 MW for RRVUNL in Rajasthan, 2x660 MW for MPPGCL in Madhya Pradesh, 3x660 MW for Mahagenco in Maharashtra, 2x800 MW for APPDCL in Andhra Pradesh and 2x660 MW for JPVL in Madhya Pradesh - are operating successfully. In the BoP segment, it completed two projects of 2x600 MW each for MPPGCL and DB Power in Madhya Pradesh and Chhattisgarh, respectively.

Projects of around 21,000 MW (with 11,980 MW FGD) are under execution, including three 2x660 MW ultra-supercritical power projects for NTPC in Madhya Pradesh, SJVN Thermal Pvt Ltd in Bihar and THDCIL in Uttar Pradesh.

Put it together and gain the power of **one**.



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## INDUSTRIAL RESOURCES

Punjab aims to develop robust infrastructure, including core and supporting infrastructure, to set the state on the path of planned industrial growth. Punjab leads in Cycle & Cycle Component Manufacturing, Tractor & Agriculture Machinery, Cotton & Blended Yarn, and Hand Tools Manufacturing.



# CONNECTIVITY

Punjab is one of the best states in India in terms of connectivity. The state's road density is two times higher than the national average and rail density is second highest in India. All major towns and cities are connected with 4/6 lane highways.

The state has two international airports at Mohali and Amritsar while a third one is soon coming up at Ludhiana. There are regular direct flights connecting Punjab with Sharjah, London, Tashkent, Dubai, Birmingham, Doha, Kuala Lumpur, and Singapore.



## EDUCATION

The State is home to a number of premium educational institutes producing skilled human resource. Punjab has at least 16 major universities and many ITIs, engineering institutes and polytechnics, which offer courses in cutting-edge technology like Artificial Intelligence (AI), Machine Learning (ML), Cloud Computing, Internet of Things (IoT), Robotic Process and Automation etc.

Some prominent institutions include Indian School of Business Mohali, IIM Amritsar, IIT Ropar, Thapar Institute of Engineering & Technology, PEC Chandigarh, PTU Jalandhar, NIT Jalandhar, Guru Nanak Dev University, LPU Jalandhar, Chitkara University, IISER Mohali, and National Agri-Food Biotechnology Institute.



## HEALTH AND WELLBEING

Punjab ranks 2nd on the National Health Index. The state is home to some of the leading healthcare institutions in the country such as PGIMER, Fortis, Max and Apollo. In terms of public health, the state provides quality preventive, promotive and curative Health Services through a network of subsidiary health centers (dispensaries/clinics etc), primary health centers, community health centers, sub-Divisional and District Hospitals, Government Medical Colleges etc.

Abundant green spaces, healthier lifestyle and sustainable way of living ensures that the state's air and water quality remains cleaner and healthier. The state has launched a multi-faceted Mission "Tandrust Punjab" to make Punjab the healthiest state by improving its air quality, water quality, and ensuring safe food and a good living environment.



# MAJOR INDUSTRIAL HUBS

## AMRITSAR

Amritsar is a centre for textile and chemical industries and is also a hub for food milling and processing, silk weaving, tanning, canning, and machine manufacturing. The city lies on the main highway connecting the city with National Capital - Delhi and is a major rail hub.



## MOHALI

Mohali is fast developing as an IT Hub of the state. The city is also one of India's biggest government-supported Start-up Hub, and about 51 acres of land in Mohali has been earmarked to establish an IT park where around Rs. 400 crore have been already invested.



## JALANDHAR

Located 144 km northwest of the state capital Chandigarh, Jalandhar is most famous for its sports goods industry. Jalandhar's steel and iron re-rolling mills, rubber goods, surgical instruments, hand-tools, electric goods, automobile parts, sewing machine factories and handloom products are also well-known in the country.

## BATHINDA

As a major industrial destination, it boasts of two modern thermal power plants (Guru Nanak Dev Thermal Plant & Guru Hargobind Thermal Plant), a fertilizer plant and the Guru Gobind Singh refinery. Bathinda has major petrochemical plants, yarn & textiles Plants, and sugar mills. HMEL is building a Grassroots oil refinery there. Companies like Ambuja Cement, UltraTech Cement, Vardhman Polytex, Grasim Industries & National Fertilizer Ltd. have set up large scale unit in the district.





## LUDHIANA

Ludhiana is Asia's largest hub for bicycle manufacturing and produces more than 50% of India's bicycle consumption. Ludhiana produces 60% of India's tractor parts and a large share of auto and two-wheeler parts.

The apparel industry of Ludhiana, popularly known as Ludhiana Hosiery industry provides employment to millions of people and produces world's best brands of winter wear (woolens and jackets). Most of the top Indian woolen apparel brands are based in Ludhiana. As a result of its dominance in the textile industry, it is often dubbed as the "Manchester of India".

Ludhiana also houses a large number of small-scale industrial units, which produce industrial goods, machine parts, auto parts, household appliances, hand tools and industrial equipments.



Enduring Value

## ITC: COMMITTED TO A PROGRESSIVE PUNJAB



### ITC's world-class Indian brands made in Kapurthala

- ▲ ITC has a growing footprint in Punjab across all three sectors of the economy - agriculture, manufacturing and services.
- ▲ ITC's world-class food processing facility in Kapurthala manufactures some of its leading FMCG brands like Aashirvaad, Sunfeast, Yippee!, Bingo! and B Natural.
- ▲ ITC is procuring wheat, fruits and milk from farmers in the state, increasing efficiencies and contributing to farmer incomes.
- ▲ ITC has an expanding presence in the tourism sector in the State. Three existing hotels - WelcomHotel Amritsar, Fortune Hotel,

Jalandhar and WelcomHeritage Ranjit Vilas, Amritsar - and another upcoming Fortune Hotel in Hoshiarpur.

- ▲ ITC subsidiary, Technico, the largest producer of early generation seed potato in India, is engaged in extensive agri development programmes in the State, including in non-traditional areas.
- ▲ ITC's CSR interventions in Punjab, including Skilling, Health and Sanitation, Sustainable Agriculture and Soil & Moisture Conservation, are being scaled up progressively and will continue to empower local communities.



# BUSINESS POLICIES AND REGULATORY ENVIRONMENT





# INSTITUTIONAL FRAMEWORK

The Industrial and Business Development Policy 2017 is a holistic framework for sustainable industrial growth of the state. The policy is architected around eight core strategic pillars of Infrastructure, Power, MSME, Ease of Doing Business, Startup & Entrepreneurship, Skills, Fiscal & Non-Fiscal Incentives and Stakeholder Engagement supported by sector-specific strategies for growth. The policy marks a decisive shift from department centric approach to a business-centric approach.

Punjab has adopted a unique model to improve business investment in the state. Invest Punjab works as the nodal agency facilitating the navigation through the state's regulatory requirements by simplifying the process through 'One Office, One Officer, One Portal and One Email' policy. It not only acts as an investment promotion agency but also as a unified regulator and aftercare agency.

To accelerate industrial growth and job creation in Punjab, the government policy seeks to accelerate growth of MSMEs; focus on Start-ups and Entrepreneurship; build institutional capacity and enhance institutional linkages; and bring synergy between state programs and central schemes.





## PRO-ACTIVE GOVERNANCE

To bring more transparency and curb corruption at all levels, the government has brought in a new Lok Pal legislation with the powers to initiate action on complaints against the Chief Minister, the Ministers and the bureaucracy at all levels.

The government has also established a Governance Ethics and Reforms Commission for comprehensive systematic reforms in the state, which will also scrutinize all transactions of above Rs. 50 crore.

The state has adopted of an e-auction mining policy, which is fully transparent, uninterrupted and uninfluenced by anyone.

The government has also enacted the Punjab Transparency and Accountability in Delivery of Public Services (including electronic service delivery) Act and the Punjab Transparency in Public Procurement Act 2019.

Some of the other laudable efforts to improve governance include targeted distribution of benefits/subsidies to genuine beneficiaries through direct bank transfers and making it mandatory for state agencies to use the Central government portal - GeM, for direct online purchase of goods and services.



## EASE OF DOING BUSINESS

Punjab has been ranked No. 1 in "Ease of Setting Up a Business" in India by World Bank. The World Bank has also ranked Ludhiana as the easiest place to do business among 17 key cities in India.

In order to further improve the ease of doing business in the state, the government has decided to re-engineer the processes of 7 core departments on priority namely Industry, Power, Pollution Control, Labour, Housing & Urban Development, Local Department and Taxation.

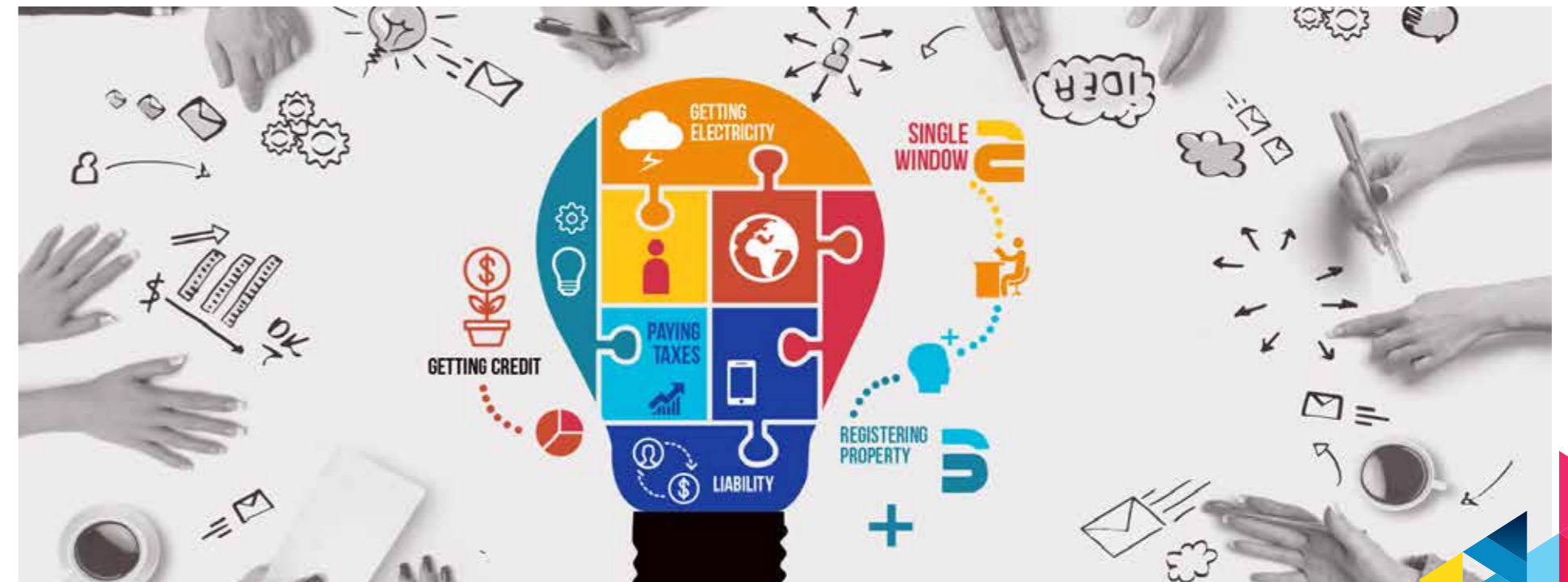


## DISTRICT LEVEL SINGLE WINDOW SYSTEM

To facilitate support to the industry at the district level, Single Window System has been setup at district level to provide one stop clearance for all regulatory services and one stop disbursement of all fiscal incentives apart from providing host of other services to MSME units and other industrial units.

The District level Single Window System will provide the following services:

- (i). One stop clearances for all regulatory services
- (ii). One stop clearances for all fiscal incentives
- (iii). Facilitate access to Infrastructure
- (iv). Facilitate access to Finance/ Credit
- (v). Facilitate access to Technology
- (vi). Facilitate access to Mentoring
- (vii). Facilitate other support measures to MSME sector
- (viii). Facilitate support to Self Employment, Startup and Entrepreneurship Development



## BUSINESS FIRST PORTAL

The state seeks to take the ease of doing business in the state to the next level by replacing multiple electronic interfaces by various regulatory departments and agencies providing services to the Industries through their lifecycle by setting up a unified BusinessFirst portal. The BusinessFirst portal will provide services to both existing as well as new industries. The portal will also provide online facility for availing various fiscal incentives and centralized inspection mechanism.

BusinessFirst will provide a common platform driven by robust IT infrastructure and services for all regulatory services and fiscal and non-fiscal incentives being delivered to the businesses throughout their lifecycle.

The portal will have a strong back end integration with every stakeholder to mandatorily perform processing of application through the portal only. It will help real time tracking of the status of various processes and generate alerts for possible delays. BusinessFirst portal will provide dashboard for review and monitoring at various levels.



CHIEF MINISTER CAPT AMARINDER SINGH LAUNCHES UNIQUE 'BUSINESS FIRST PORTAL' TO FURTHER BOOST INVESTMENT SENTIMENTS IN PUNJAB



LET'S  
CHANGE  
THE  
WORLD.  
LET'S  
START  
A LITTLE  
GOOD.



Hindustan Unilever Limited

start  
a little  
good





# FOCUS SECTORS



  
**GROWTH DRIVERS**

Punjab has identified the following sectors as thrust sectors keeping in view the potential for their future growth in the state and employment generation:

**Manufacturing Industry**

- Agro & Food Processing
- Hi tech manufacturing
- Mobility Solutions
- Textiles
- Sports
- Hand Tools

**Services Sector**

- Healthcare & Medical Tourism
- Logistics
- IT & ESDM

The state provides the following incentives to MSME and Large units in Thrust Sectors:

- Investment subsidy by way of reimbursement of net SGST on intra-state sales - 100% of net SGST for 10 years with a cap of 125% of FCI
- Exemption from Electricity Duty - 100% exemption for 10 years
- Exemption/reimbursement from Stamp Duty - 100% exemption/ reimbursement from Stamp Duty on purchase or lease of land and building
- 100% exemption from CLU/EDC
- 100% exemption from Property Tax for 10 years





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## AGRO AND FOOD PROCESSING

### SECTOR AT A GLANCE

- Share of Agri & Food Processing sector in manufacturing is 21% against India's 8.8%
- Key Commodities - Wheat, Rice, Fruits & Vegetables, Dairy
- One of the best food processing infrastructures in the country
- Strong Government support - Thrust Sector with best in class incentives
- Significant industry presence of key Marquee Brands
- Significant opportunities - Milk Processing, Vegetables and Fruits processing, Rice, Cereal Processing, Meat Processing
- First state to introduce Traceability in Seed Potato
- Punjab's total exports of APEDA Products (2018-19) was USD 520 million
- Shares in India's Food Export was 2.8%
- Share of Agri Export in total merchandise exports from Punjab was 14.9%



## COMPETITIVE ADVANTAGE

With only 1.5% of India's area, Punjab is a leading producer of several agro & food commodities. The Net Sown Area in the state is highest in India--a whopping 4.13 Million ha, which is 82% of the state's area. Of this, 99.9% area is properly irrigated with a cropping intensity of 204%, which is again highest in India. As the 'Food Bowl of India', Punjab is a leader in production of several agri & food commodities, registering highest wheat and rice yield in India (5188 Kg/ha and 4132 Kg/ha, respectively). The state is also first in per capita milk availability in the country, (1120 gms / day, three times the national average); 2nd in Wheat & Rice production; 3rd in Honey production in the country; is among the largest producers of Peach, Pear, Kinnow, Muskmelon, Peas and Radish; and offers a strong dairy industry network. Punjab is the highest contributor to India's total pool of food grains, playing a critical role in ensuring the country's food security. With just 4.6% of the net sown area, Horticulture contributes about 12.4% to the agriculture GDP of the state.

Major processed food commodities being produced in the state include Milk, Butter, Ghee, Curd, Cheese, UHT milk, Infant Food, Dairy Whitener, Chocolate etc. There is ample availability of Horticulture produce for processing in the state including Kinnow and Guava for juice and candy; Pear for jam/murrabah; Potato for chips/flour; Peas for consumption as frozen food; and Tomato for preparing ketchup/puree.

Some of the world's leading processed food brands present in Punjab include Verka, Nestle, Danone, HF Super, Amul, Heritage, ITC, Schreiber, IFFCO, Pepsico, Mahindra HZPC, Punjuice, and Unilever. The food processing industry in Punjab exports to countries like Saudi Arabia, USA, UAE, UK, Pakistan, Qatar, Oman, Iraq and Kuwait. The growth of food processing industry in Punjab has happened on the back of an extensive infrastructure -- Production, Storage and



Marketing support -- provided by the state government. The food processing infrastructure across the state includes:

- 162 warehouses & storage with a total storage capacity 6.3 MMT
- A chain of 600+ cold storage across the states
- As many as 3 Mega Food Parks at Ludhiana, Fazilka and Kapurthala
- As many as 5 Agri Export Zones with 153+ Agriculture Produce Market Committees/Mandis, and 3,110 Purchase Centers

The Agri Extension services are offered through a network of Krishi Vigyan Kendras & Farm Advisory Service Centres. The State has also setup three Centers of Excellence in collaboration with Israel and Netherlands at Jalandhar (for vegetables & potatoes) and Hoshiarpur (for citrus fruits).





# TEXTILES

## SECTOR AT A GLANCE

- Among Top 10 Cotton producing states in India
- Annual production of 1.28 million (12.83 Lakhs) bales\*
- 2nd in cotton and blended yarn production
- 3rd in installed spinning capacity (7.8% of total) of India
- 95% of India's woollen knitwear production
- 6.5% of country's cotton fabric production, ranked 7th in India
- Leading manufacturer of hosiery woollen goods, contributing to 65% of India's production
- 85% of India's sewing machine production

## COMPETITIVE ADVANTAGE

Punjab is among the largest producers of Cotton, Blended Yarn and Mill Made Fabrics in India. The size of Punjab's Textile Industry is ~USD 4.28 billion, employing some 2,50,000 people, of which 45,000 are women. The Textile Industry accounts for 19% of industrial output (Gross Value Added) of the state, while the share of textile in Punjab's total exports is 21%. The share of Cotton Yarn and Ready Made Garments export from Punjab stood at USD 927 million in 2018. The state offers a Complete Value Chain of Textiles in the state from Raw Material (Natural Fibres-Cotton and Wool) to Yarns, Fabrics, Apparel Manufacturing, Retail, Export, Sports Goods and Textile Machinery. Punjab has 4 Textile Parks and 4 Major Textile Clusters, which provide State-of-the-Art Infrastructure and Conducive Ecosystem.



Textile is a Thrust Sector in Punjab offering attractive incentives which include:

### For Anchor Units

- Net GST Reimbursement for 15 Years on Both Inter & Intra State Sales - Up to 200 % of FCI
- Employment Subsidy up to INR 48,000 Per Employee Per Year for 5 years
- 100% Exemption on Electricity Duty for 15 years
- 100% Exemption on Stamp Duty and CLU/EDC charges

### For MSMEs and Large Units

- Net GST REIMBURSEMENT for 10 years up to 125% of FCI
- 100% exemption in Electricity Duty for 10 years
- 100% exemption/ reimbursement from Stamp Duty on purchase or lease of land and building
- 100% exemption from CLU/EDC
- 100% exemption from property tax for 10 years

### Additional Incentives for MSME

- 5% p.a. Interest Subsidy in Border Districts and Kandi Area and SC/Women Entrepreneurs up to INR 10 lakhs per year for 3 years
- Reimbursement of 50% of expenses up to INR 5 lakhs under ZED scheme of GOI
- Assistance for access to Finance, Technology, Infrastructure, Marketing & Exports
- Additional State support of interest subsidy under Credit Linked Capital Subsidy Scheme (CLCSS) of Ministry of MSME, Government of India
- Reimbursement of 50% of expenses subject to maximum of INR 5 lakhs incurred on plant and machinery/ testing equipment under ZED scheme of GOI
- Assistance for access to Finance, Technology, Infrastructure, Marketing & Exports



## IT/ITES

### SECTOR AT A GLANCE

- Presence of 150+ registered IT units
- Approximately 35,000+ IT professionals in the region
- Higher cost savings of 9-14 % over tier 1 cities
- Achieved more than twice the allotted target by bagging 2,600 seats under the flagship GoI IBPO Scheme
- STPI Exports amounting to INR 4,400 crore
- Punjab is home to India's only large scale ASIC Fabrication Laboratory



### COMPETITIVE ADVANTAGE

Punjab has developed a strong IT/ITES & ESDM ecosystem, exporting to countries like USA, Norway, Canada, and Australia, among others. Mohali has emerged as 'The Next Big IT Destination' of India with world class amenities, residential complexes and international sports facilities. This Greenfield City has already attracted IT majors like Infosys, Teleperformance & Emerson among the top IT companies.

The ESDM sector in Punjab has been contributing to areas like Space and beyond through cutting- edge R&D. Mohali based Semiconductor Laboratory (SCL) has supplied more than 1,00,000 units of Multiplexed Analog Signal Processor (MANAS) ASIC for use in high energy physics experiments (ALICE) at Large Hadron Collider, CERN- Geneva.

## MOHALI - A WORLD-CLASS IT HUB

Software Technology Park of India (STPI) in Mohali is the largest in the country, providing a comprehensive support to companies working in the field of Big Data, AI, IoT and Audio Visual Gaming, among others. STPI offers Tier III standard world-class Data Center with 160 rack capacity; biggest Incubation Centre with an area of 1.4 lakh sq. ft; and Plug & Play Facilities including a state-of-the-art Network Operations Centre.

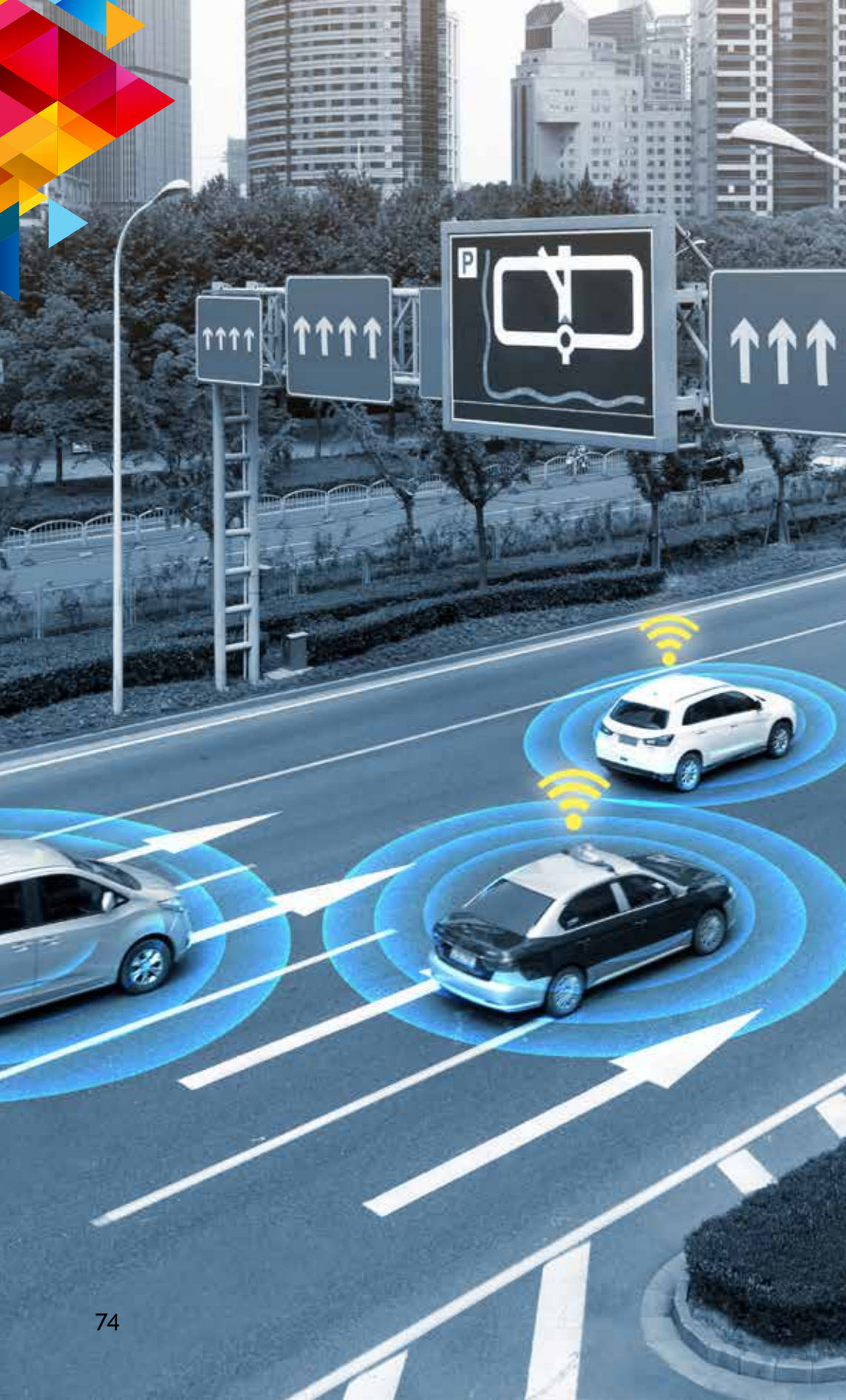
The IT City in Mohali is a 1,700-acre project with the presence of approximately 45 companies who are at various stages of operationalisation. The city is surrounded by existing Aerocity, World Trade Centre, and leading research & academic institutes.

Mohali is also home to Quark City, a notified IT SEZ with approximately 10 lakh sq. ft of area. Over 70 IT/ITeS companies present here draw their power from Quark City's own 66KV substation and it also offers multi-tenant facility with 24X7 operations.

The Bestech Towers is an IT Park/commercial complex with facilities like multi-level car parking, centralized air-conditioning and 100% power backup. Around 3.5 lakh sq. ft. area is available with sale and lease of bare shell and Plug N Play options of ownership.

Neuron is a Centre of Excellence at STPI Mohali which seeks to identify and evaluate promising startups in the field of AI/Data Analytics, IoT and Audio, Visual, Gaming (AVG) that are hosted in the Startup Punjab Hub at STPI Mohali Incubator. This 500-seater Incubator has been built with an investment of Rs 20 crore with an aim to incubate startups in cutting-edge technologies.





## MOBILITY

### SECTOR AT A GLANCE

- Punjab is India's largest tractor manufacturing state
- The state accounts for 92% of India's total production of bicycle parts; Accounts for 75% of Bicycle production
- The state has presence of manufacturers across the value chain of automobiles
- Hosts India's 2nd largest forging unit
- Foreign representation in Punjab Auto sector includes Germany, Japan, and USA
- Presence of India's leading electric 2W manufacturing companies

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Trucks & Buses



## COMPETITIVE ADVANTAGE

Punjab is an ideal location for Mobility manufacturing owing to its proximity to OEM clusters in NCR, Haryana and Rajasthan, which account for 60% of India's total production of 2W segment and approximately 50% of 4W passenger vehicle production. Also, the state is located in North India, which contributes to nearly 30% of India's total automobiles sales. Punjab has 45 Industrial Focal Points with State-of-The-Art Common Infrastructure facilities including common facilities centres with advanced machines and labs to support manufacturing for Mobility sector.

The future of mobility is going green, and Punjab is well positioned to take India's mobility sector to new heights. The growth drivers for Mobility in Punjab include:

- Clean/Green Zones have been declared in 5 Districts (Ludhiana, Jalandhar, Patiala, Amritsar & Bhatinda) to promote cleaner mobility
- Dedicated Bicycle tracks for enhanced safety on roads
- Young, rich, educated and entrepreneurial society of Punjab welcomes new technologies. The Per Capita Income of Punjab is 24% higher than average in India which gives the State a clear advantage in terms of purchasing power
- Jalandhar, Amritsar and Ludhiana identified as Smart cities, having a key focus on Smart and Clean Mobility
- Punjab is among the leading states with Easy Access to Finance
- Preference in Government procurements to Punjab based manufacturers
- IBDP 2017 policy offers lucrative incentives to Manufacturers, while the Government of Punjab's EV Policy offers incentives for user adoption, infrastructure providers and ecosystem enablers
- Key Mobility Centres in the state include Kapurthala, Ropar, Patiala, Jalandhar, Hoshiarpur, Ludhiana, Mohali, and Fatehgarh Sahib







# PUNJAB'S READINESS FOR INDUSTRY 4.0

## Manufacturing Base

Over 24 Industries like ITC, Nicks Auto, Hero Cycles, Vardhman Steel, Tyson India, Akzo Nobel India & Tynor Orthotics are using automation. HMEL Bathinda has won the Customer Excellence Award for implementing Robotics Process Automation in 2019

## Technology Base

Mohali provides excellent infrastructure promoting tech-base for Industry 4.0 like Quark

City, IT City, BESTECH Towers and STPI etc. Amritsar is coming up with a new STPI which will offer state-of-the-art incubation facility.

## Skilled Manpower

Many public and private institutions like IIT, Ropar, NIELIT, PSDM, Chitkara University, LPU etc are offering courses on AI/ML, Robotics, IOT, Cloud and emerging technologies. IIT Ropar is providing research services in Industry 4.0 areas in collaboration with NCCU- Taiwan.



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# THE NEED TO INNOVATE

For Punjab to lead the Industry 4.0 in India, the state will require:

- Reshoring of Manufacturing Operations, using automated technologies to drive new manufacturing models such as Smart Manufacturing, Distributed Manufacturing and Servicification of Manufacturing
- Additive manufacturing to drive precision, customization and speed
- Innovative new technologies such as Big Data, IoT, AI/ML, compatible technical products, solutions and services
- Digitization across value chain with high speed connectivity
- Development of new technical competencies and interdisciplinary skills
- Evolving ecosystem with changing human-machine interfaces



## FOSTERING GROWTH OF INDUSTRY 4.0

### Indo-Taiwan Joint Research Centre

It is the first ever joint Research Centre on Artificial Intelligence and Machine Learning with National Chung Cheng University Taiwan opened up at IIT-Ropar in Punjab.

### Neuron: Centre of Excellence at STPI Mohali

Neuron is an initiative, to identify and evaluate promising startups in the field of AI/Data Analytics, IoT and Audio, Visual, Gaming (AVG) that will be hosted in the Startup Punjab Hub at STPI Mohali Incubator.





# TOURISM & CULTURE

## LAND OF COLOURFUL HUES

Punjab with its ancient buildings erected by the Patiala dynasty, vibrant culture, sunshine-yellow mustard fields, heritage sites, open spaces and effervescent lifestyle, has all the necessary ingredients to represent the diversity of India as a vibrant cultural land.

The land of five rivers is also a land of food, colour, and happiness. Being one of the most significant places in India historically, this state is filled with wonderful architecture and places of worship. Colourful and vibrant fairs and festivals, music, dance, and love for food are the characteristics of the state's rich cultural life.





## DANCE & MUSIC

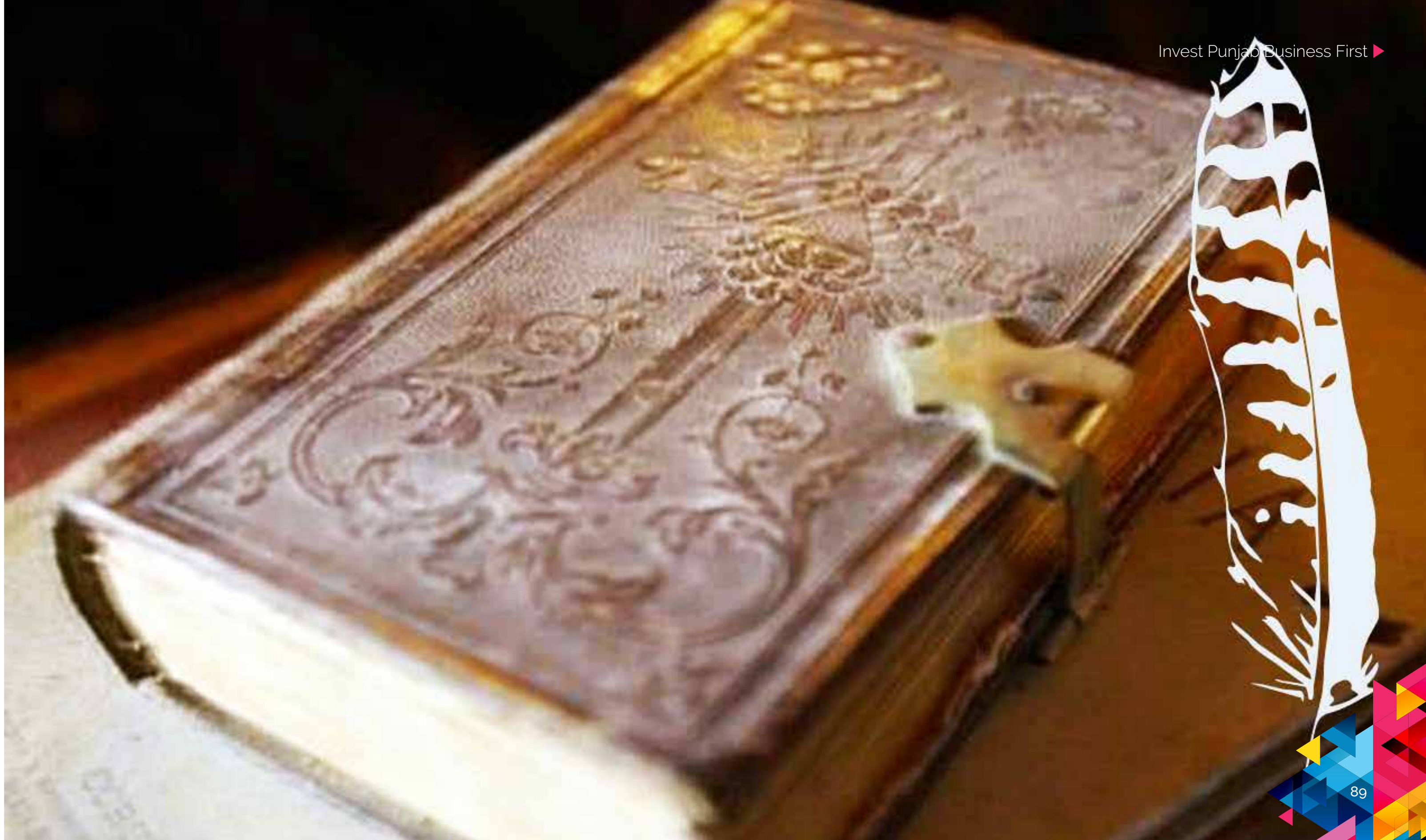
Punjab is known for its typical dancing styles like bhangra, jhumar, and sammi among the most popular genres. Giddha, a native Punjabi tradition, is a humorous song-and-dance genre performed by women. In addition to Sikh religious music, semiclassical Mughal forms, such as the khyal dance and the ṭhumrī, ghazal, and qawwālī vocal performance genres, continue to be popular in the state.





## LITERATURE

Punjabi literature traces its origins to the mystical and religious verse of the 13th-century Sufi (mystic) Shaikh Farīd and to the 15th–16th century founder of the Sikhism, Guru Nanak. They were the first proponents of Punjabi literature and used it extensively as a medium of poetic expression. The works of Sufi poet Waris Shah, poet and author Bhai Vir Singh, poets Puran Singh, Dhani Ram Chatrik, Mohan Singh “Mahir” and Shiv Kumar Batalvi also greatly enriched Punjabi literature.





## ARCHITECTURE

The state's outstanding architectural monument is the Golden Temple at Amritsar, which blends Indian and Muslim styles. Other important architectural marvels include the Martyr's Memorial at Jallianwalla Bagh, the Durgiana temple of Amritsar, the Moorish Mosque in Kapurthala that is patterned after a Moroccan model, and the old forts of Bathinda and Bahadurgarh, among numerous others.





## FAIRS AND FESTIVALS

Punjab holds numerous religious and seasonal festivals, such as Dussehra, Diwali, and Baisakhi, which for Hindus is a new year's festival and for Sikhs is both an agricultural festival and a celebration of the birth of the community's Khalsa order. There also are numerous anniversary celebrations in honour of the Gurus (the 10 historical leaders of Sikhism) and various saints.







## TOURISM

Punjab, a land steeped in history, culture, art and beauty, has immense potential to be developed into a global tourism destination. The state offers huge potential in terms of promoting religious tourism and sites relating to India's freedom movement.





## MAJOR TOURIST DESTINATIONS

Among the major tourist destinations spread across the state include Golden Temple, Jallianwala Bagh, Anandpur Sahib Fort, Rajmahal, Virast-e-Khalsa, Bahia Fort, Sri Takht Keshgarh Sahib, among others.





## PUNJ SAROVAR YATRA

This walk aims to introduce the story of five important sarovars in Amritsar to the visitors and to also give them an insight into the evolution of Sikhism. The walk begins at Sri Santokhsar Sahib Sarovar and passes through Sri Bibeksar Sahib Sarovar, Sri Ramsar Sahib Sarovar and Sri Kaulsar Sahib Sarovar before finally culminating into the most sacred sarovar, Sri Amrit Sarovar Sahib.



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