

### About Invest India

Invest India is the National Investment Promotion and Facilitation Agency of the Government of India mandated to facilitate investments in India. Besides investor targeting and facilitation, Invest India runs effective programs for resolving issues and grievances of existing investors through its after-care programs.

A 150+ member team provides sector-and state-specific investment opportunities, advises investors on regulatory procedures and clearances, and hand-holds investors through the entire investment process. Invest India team comprises of highly educated and experienced professionals, with prior experience of working with foreign multinationals across areas such as investment banking, consulting, corporate strategy, taxation and law.

Headquartered at New Delhi, Invest India coordinates with all Indian stakeholders such as central ministries, state governments, Indian missions across the globe, regulatory bodies, Industry chambers, etc. In addition, Invest India has forged partnerships with a large number of foreign stakeholders such as foreign missions and trade offices in India, investment promotion agencies for key FDI source countries, sectoral industry associations and bilateral chambers. The firm has a strong working relationships with all Indian states and union territories, where it works to build capacity, formulation of regional plans for investment facilitation and industrial cluster development.

Invest India, set up in 2009, is a non-profit venture under the Department for Promotion of Industry and Internal Trade, Ministry of Commerce and Industry, Government of India. Currently, it manages key national missions and initiatives such as Make in India, Start-up India, Project Monitoring Group, Accelerating Growth of New India's Innovations (AGNii), India Investment Grid (IIG) and Industrial Information System (IIS).

The firm is one of the most awarded Investment Promotion Agency in the world, and has won the Best Investment Project Award three years in a row (2016, 2017 and 2018) at the Annual Investment Meeting (AIM) organized by the Ministry of Economy, UAE. Invest India also won the prestigious The UNCTAD Award 2018 for promoting investment in sustainable development, the UNCTAD Investment Promotion Award 2016 for excellence in partnering for investment promotion, and the Investment Award 2016 from the Indian Ocean Rim Association, among others.

Please learn more about Invest India at  
<https://www.investindia.gov.in/>

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### About JLL

JLL (NYSE: JLL) is a leading professional services firm that specialises in real estate and investment management. Our vision is to reimagine the world of real estate, creating rewarding opportunities and amazing spaces where people can achieve their ambitions. In doing so, we will build a better tomorrow for our clients, our people and our communities. JLL is a Fortune 500 company with annual revenue of \$16.3 billion, operations in over 80 countries and a global workforce of over 90,000 as of December 31, 2018. JLL is the brand name, and a registered trademark, of Jones Lang LaSalle Incorporated. For further information, visit [jll.com](http://jll.com)

### About JLL India

JLL is India's premier and largest professional services firm specialising in real estate. With an audited revenue of 4,134 crores for FY 2018-19, the Firm is growing from strength to strength in India for the past two decades. JLL India has an extensive presence across 10 major cities (Mumbai, Delhi NCR, Bengaluru, Pune, Chennai, Hyderabad, Kolkata, Ahmedabad, Kochi and Coimbatore) and over 130 tier II & III markets with a cumulative strength of close to 12,000 professionals.

The Firm provides investors, developers, local corporates and multinational companies with a comprehensive range of services. This includes leasing, capital markets, research & advisory, transaction management, project development, facility management and property & asset management. These services cover various asset classes such as commercial, residential, industrial, retail, warehouse and logistics, hospitality, healthcare, senior living, data centre and education.

JLL India won the Five Star Award for 'Best Property Consultancy at the International Property Awards Asia Pacific 2018 -19. The Firm was also recognised amongst the 'Top 100 Best Places to Work in India' three years in a row (2017, 2018 and 2019) in the annual survey conducted by Great Place to Work® and The Economic Times. It has also been acknowledged as 'Property Consultant of the Decade' at the 10th CNBC-Awaaz Real Estate Awards 2015. For further information, please visit [jll.co.in](http://jll.co.in)

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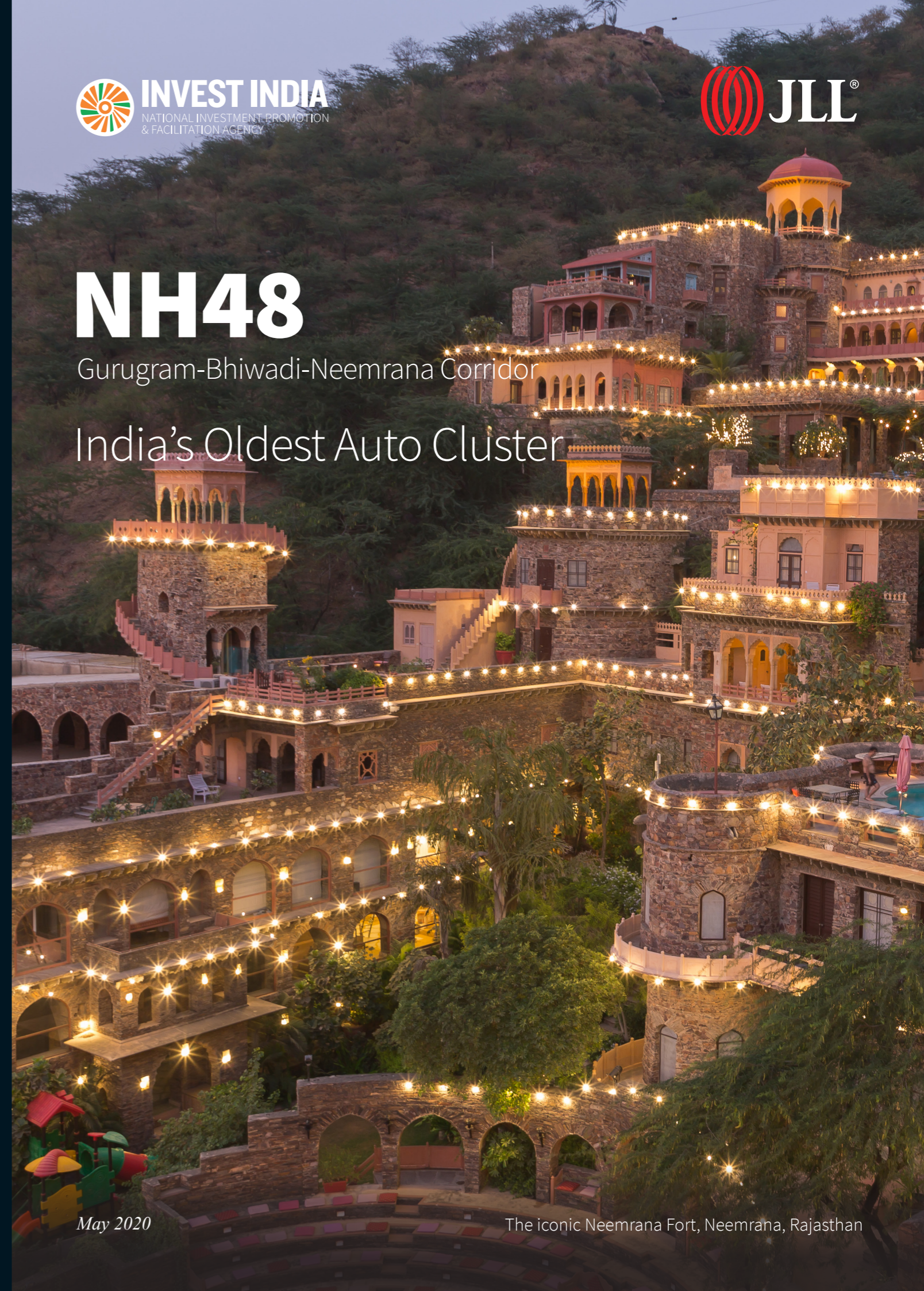
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# NH48

Gurugram-Bhiwadi-Neemrana Corridor

## India's Oldest Auto Cluster



Erstwhile **NH08**, now **NH48** is the main highway connecting Delhi NCR with Mumbai. Several industrial clusters (Gurugram, Manesar, Bhiwadi, Bawal, Neemrana and Ghiloth) have developed along the highway (especially in the vicinity of NCR) that connects the Northern hinterland to Jawaharlal Nehru Port, Navi Mumbai. Today, it has become the conceptual spine of the DMIC along with WDFC and is one of the fastest growing industrial belts in North India.

## STATE SNAPSHOT - HARYANA

GSDP Growth (FY 18):  
**7.9%**

HDI Rank (2018):  
**3<sup>rd</sup> Rank**

Logistic Performance Index  
(2019) : **3<sup>rd</sup> Rank**

**16<sup>th</sup> Rank; INR 102 Bn**  
IEMs Implemented (Jan'14 – Dec'19)

No. of Factories in State (FY 18):  
**8,891; 11<sup>th</sup> Rank**

State's contribution to India's  
Exports (FY 19): **4.9%**

Note: Excludes Union Territories

• **National Capital Region (NCR)**: 2 districts of **Rajasthan**, 14 districts of **Haryana**, NCT of Delhi & 8 districts of Uttar Pradesh

- Rajasthan is the state with **highest solar potential** of 142 GW
- Entire Haryana state falls in the influence zone of 2 industrial corridors: Delhi Mumbai Industrial Corridor (DMIC) & Amritsar Kolkata Industrial Corridor (AKIC)
- Haryana is the first state to have implemented its own State Wide Area Network (SWAN):

### Digital Inclusion

## STATE SNAPSHOT - RAJASTHAN

GSDP Growth (2016-17):  
**5.5% 23<sup>rd</sup> Rank**

HDI Rank (2018): **13<sup>th</sup> Rank**

Logistic Performance Index  
(2019) : **4<sup>th</sup> Rank**

**8<sup>th</sup> Rank; INR 321 Bn**  
IEMs Implemented (Jan'14 – Dec'19)

No. of Factories in State (FY 18):  
**9,212; 10<sup>th</sup> Rank**

State's contribution to India's  
Exports (FY 19): **1.8%**

Note: Excludes Union Territories

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Haryana Industries  
Department,  
Government of Haryana



Rajasthan Industries  
Department, Government  
of Rajasthan



Haryana State Industrial and  
Infrastructure Development  
Corporation (HSIIDC)



Rajasthan State Industrial  
Development and  
Investment Corporation  
(RIICO)



Haryana Enterprises  
Promotion Centre  
(HEPC)



Bureau of Investment  
Promotion (BIP)

DLF Cyber City, Gurugram

# WHY NH48

## Haryana contributes

 **20%** India's Largest **Automobile** OEMs

 **3<sup>rd</sup>** Largest exporter of **software**

 **50%** of **Passenger Cars** manufacturing in India


 **60%** **Motorcycles** manufacturing in India

## Rajasthan contributes

 **>100** **Auto component** manufacturing unit.

 **2<sup>nd</sup>** Largest **mineral producing** state, sole producer of lead & zinc

 **1<sup>st</sup>** Largest producer of **blended fabric & wool**

 **1<sup>st</sup>** Only state with all **raw materials for ceramics & glass** industry – silica, feldspar, ball clay, etc.

DLF Cyber City, Gurugram

- 2 out of 8 manufacturing cities in Phase 1 of DMIC are on NH48.
- NH48: **busiest highway** of the country with 57% of freight on trucks
- Narnaul Multi Modal Logistics Park (MMLP): North India's largest MMLP & a major container transshipment hub for the Inland Container Depots (ICDs)

- **Western Peripheral Expressway** – 135.6 km, 6-lane access-controlled expressway connects multiple arterial national highways NH-1, NH-10, NH-48 in a semi-circular arc formation. Fully operational since 2018 resulting in massive logistical efficiency in the region

## Haryana's business capital – Gurugram, is home to more than half of the Fortune 500 companies.



### Manesar-Bawal Investment Region (402 sq.km.)

- One of the **largest auto hubs in India** (hosts Maruti Suzuki, Harley Davidson, Honda Motorcycle and Scooter India (HMSI))
- Global City Project in Gurugram (Proposed DMIC Node)
- Integrated Multi-model Logistics Hub (MLH) in Narnaul
- International Center for Automotive Technology (ICAT) has been set up at Manesar as a part of National Automotive Testing of R&D Infrastructure Project (NATRiP)








### Japanese Industrial Township (JIT), Neemrana

- **1st operational JIT** in India
- Hosts **55+ Japanese companies**. Eg: Daikin, Hitachi Chemicals, NIDEC, Kehin
- Collaborative effort of Government of Rajasthan and JETRO (Japan External Trade Organization)

# SECTOR SNAPSHOT

## Emerging Sectors

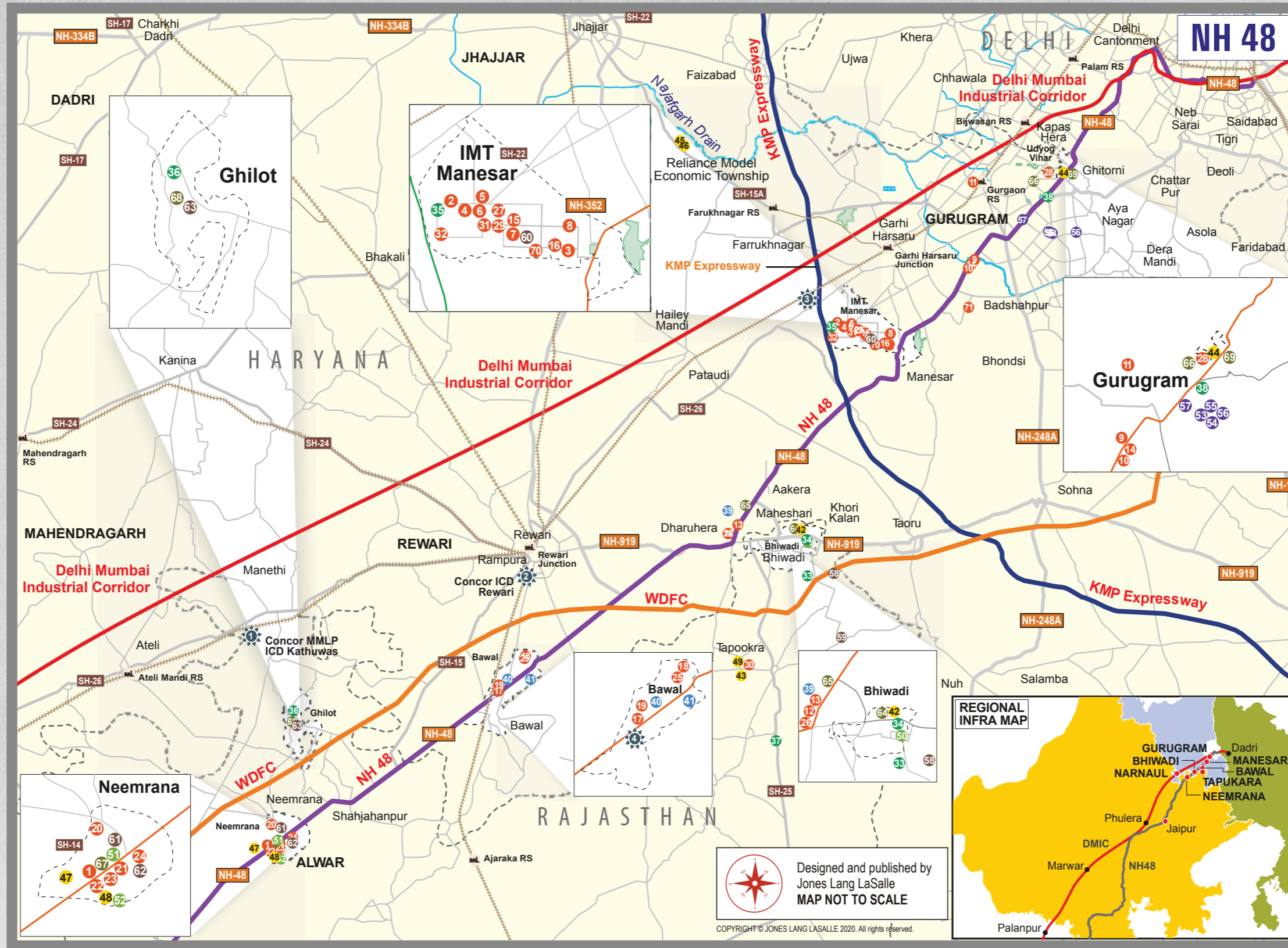
 <b>Auto &amp; Ancillaries</b>	 <b>IT/ITeS</b>	 <b>FMCG</b>	 <b>Ceramic and Glass</b>	 <b>ESDM</b>
<p><b>NH48: Largest auto ecosystem in India</b></p> <p>Gurugram-Manesar-Bawal belt is known as <b>"Auto Hub"</b> which accounts for 50% of 4-wheelers &amp; 37% of 2-wheelers manufactured in India</p> <p><b>Maruti Suzuki, Hero Motocorp, Suzuki Motorcycles, Taiyo Daiichi, Mitsubishi, Jonson Matthey, Minda Group, Keihin, Suzuki powertrain, Munjal Showa, Denso, HMSI, JBM, Musashi, Harley Davidson</b></p>	<p>Gurugram has 1500+ startup companies</p> <p><b>Zomato, Shopclues, Uber, Facebook, Google</b></p>	<p>Significant presence of large FMCG sector</p> <p><b>Unicharm, British Health Products, Gillette India</b></p>	<p>Industrial Zone at Ghiloth by RIICO: First such attempt in India</p> <p><b>Major players: Saint Gobain, Kajaria, Jaquar, Parryware, Roca, JCPL</b></p>	<p>Launch of Electronics Cluster of 100 acres at Bhiwadi</p> <p>A few electronics companies starting operations in Gurugram, Bawal and Manesar</p> <p><b>Major Players: Fiem Industries, Deki Electronics, Elin Electronics, Vsun</b></p> <p><b>Electric Vehicles and Batteries: Dedicated policy under formulation</b></p>

## Prominent industrial areas for greenfield and secondary transactions

	Industrial Park	Total Area (Acres)	Major Occupiers	Remarks
Haryana	Udhyog Vihar, Gurugram	1,125	Maruti Suzuki, Micromax, Sun Pharmaceutical, Euronics India	Industrial estate having more than 1,200 industrial & commercial units & is developed in 6 phases.
	Reliance MET	8,250	Panasonic, Denso, Amber Enterprises	Integrated industrial township consisting of Electronic Manufacturing Cluster, Small & Medium Enterprises Park, Footwear Park & Engineering Park.
	IMT Bawal	1200	Harley Davidson, Minda Furukawa Electric, Haco Group, POSCO, Musashi Auto Parts	Focus Sectors: Auto & Ancillaries, Engineering.
	IMT Manesar	2,087	Maruti Suzuki, Baxter, Honda, Livpure	
Rajasthan	Export Promotional Industrial Park (EPIP), Neemrana	107	Over 150 export – oriented units	Largest Export-Park in Northern India with export oriented manufacturing facilities for Gems and Jewellery, Electronics, Garment, Handicrafts, Engineering, Leather goods & IT Park.
	RIICO Industrial Park, Neemrana (Phase 1 & 2)	650 + 315	Havells, Alchem, Parle, SEL Textiles, HeroMotor Corp	Focus Sectors: Auto & Ancillaries, Pharmaceuticals, Electronics.
	Japanese Industrial Zone, RIICO Neemrana	1,167	Daikin, Nissin Brakes, Mikuni India, Kokoku Intech, Taiyo India, Nippon, NIDEC	MoU between RIICO & JETRO: Encourage Japanese investments through streamlined license process.
	RIICO Industrial Park, Ghiloth	1,700	Havells, Indus Pharma, Urotek Industries, Glocera, Lloyd	Focus Sectors: Glass & Ceramic industries, General Industries.
	RIICO Industrial Park, Karoli	527	Kalyani Technoforge, Groz Engineering Tools, Bhagwati Products, Capstone Polyweave	Auto Zone, EMC zone and General zone.

The major industrial corridors can be identified along NH48 as Gurugram, Bhiwadi, Neemrana, Ghiloth, Manesar and Bawal. The land rates in these corridors range between INR 3,500 to INR 20,480 per sqm. The rates mentioned are indicative and may vary on other parameters as well.

Sr.	Project Name
<b>AUTO &amp; ANCILLARY</b>	
1	Maruti Suzuki
2	Bajaj Motors
3	Honda Motorcycle & Scooter
4	Faurecia Automotive
5	HI-LEX India
6	Subros
7	Calsonic Kansei Motern Auto
8	Mitsubishi Electric Automotive
9	Tata Motors
10	JTEKT India
11	JPM Automobiles
12	JTEKT India
13	Amtek Auto
14	Rico Auto
15	Motherson Automotive
16	Denso
17	Harley-Davidson Motorcycles
18	Furukawa Minda Electric
19	Musashi Auto Parts
20	Hero Motorcorp
21	NISSIN Brakes
22	Mikuni India
23	Kokoku Intech India
24	TAIYO India
25	Roki Minda
26	JTEKT India
27	Magneti Marelli
28	Maruti Suzuki
29	Johnson Matthey
30	Honda Cars
31	Maruti Suzuki Power Train
32	JBM
70	Johnson Matthey
71	Suzuki Motorcycle
<b>CERAMIC &amp; GLASS</b>	
33	Saint-Gobain Glass India
34	Jaquar & Company
35	Jaquar & Company
36	Glocera
37	Kajaria Ceramics
38	Parryware Roca
<b>ENGINEERING</b>	
39	Jindal Prefab
40	Haco Machinery
41	POSCO
<b>ESDM</b>	
42	Lloyd
43	Micromax
44	Euronics Industries
45	Panasonic
46	Amber Enterprises
47	Havells India
48	Daikin Air-conditioning India
49	FIEM Industries
<b>FMCG</b>	
50	Gillette India
51	Parle
52	Unicharm India
<b>IT/ ITeS</b>	
53	Shopclues Network
54	Zomato
55	Uber
56	Facebook
57	Google
<b>PHARMA &amp; BIOTECH</b>	
64	British Health Products
65	Capsugel Healthcare
66	Sun Pharmaceutical
67	Baxter
68	Alchem International
69	Indus Pharma
<b>OTHERS</b>	
51	Sterlite Technologies
58	Ashirvad Pipes
59	United Breweries
60	Livpure
61	SEL Textiles
62	Nippon Pipe
63	Urotek Industries



- Western Dedicated Freight Corridor
- Kundli Manesar Palwal Expressway
- NH-48
- Delhi Mumbai Industrial Corridor

Manesar, Bawal and Neemrana came across as a natural choice as these were upcoming industrial regions with proximity to Delhi. These industrial corridors are adjacent to the national highway and provide excellent connectivity across India. Presence of leading automotive OEMs, our key customers, in this region cemented our decision further.

*-Mr. Nirmal Minda, Chairman & MD, UNO Minda*

India is about to see a significant change in its emissions strategy, from Bharat Stage IV to Bharat Stage VI standards. This will require heavy-duty vehicle & additional demand for Johnson Matthey's catalysts. We've been very pleased with our existing experience in Haryana: support from government, availability of skilled workers, & excellent infrastructure. We wanted the new plant to be near Manesar, close to major automotive customers.

*-Har Nishith Sahai, Commercial Director, Johnson Matthey*