GOVERNMENT OF TAMILNADU

TRUTH ALONE TRIUMPHS

TAMIL NADU

GLOBAL INVESTORS MEET 2019

INVESTORS' CHOICE

23rd - 24th January 2019

Agenda

1. About Tamil Nadu
2. Competitive advantages of Tamil Nadu
3. Sectoral Opportunities in Tamil Nadu
4. Government support to investors

Advantage Tamil Nadu

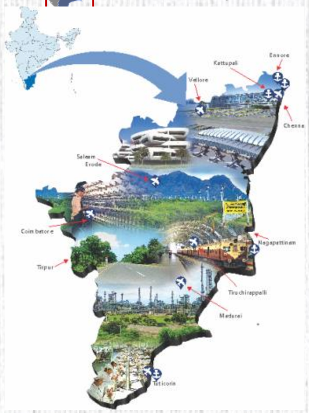
2nd largest State Economy in India – . In PPP terms, US $605.26 billion)– 32nd largest in PPP terms and bigger than Vietnam, Belgium, Sweden, Norway, Finland, Denmark, New Zealand

GSDP growth rate at constant prices – 7.94% GSDP (FY 16-17); 8.03% expected growth, US$ 207.8 billion (CAGR) – FY 17-18

1st Industrial performance | Investment potential*
Number of Operational Special Economic Zones
Number of persons employed

Ranks 9th Globally in production of Renewable energy (Power surplus state > 15000 Mega Units)

World's Fastest Growing Economy



Investor's choice in India

Source: DIPP, Government of Tamil Nadu policy note 2018-19, Tamil Nadu Budget note 2018-2019, IBEF , Invest India, IMF, 2017, * - Frost and Sullivan report March 2018, ASI 2015-16, IEEFA report 2018

Advantage Tamil Nadu

8.4%

2nd largest contributor to India's GDP

11%

Contribution to India's industrial output

17%

State's share in number of factories, higher than any other State

7.7%

4th in terms of FDI inflows

28%

Contribution to India's renewable energy capacity, higher

18%

Number of India's technical universities, higher than any other State

10%

Net Value added in factory Sector

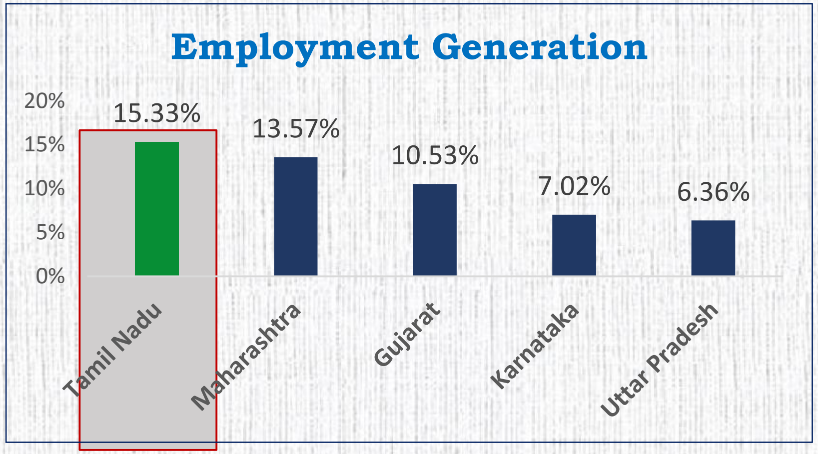
Industrial Output in factory Sector

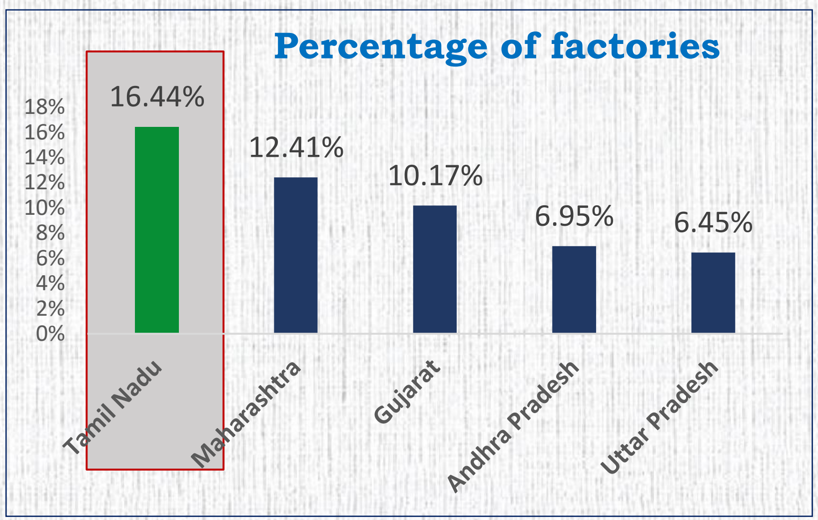
48.5%

India's most urbanized State by geography and population

14%

Contribution of renewables meeting State's energy needs





Source: IBEF – TN state report 2018 , DIPP, Govt. of India, Govt. of Tamil Nadu 2018,

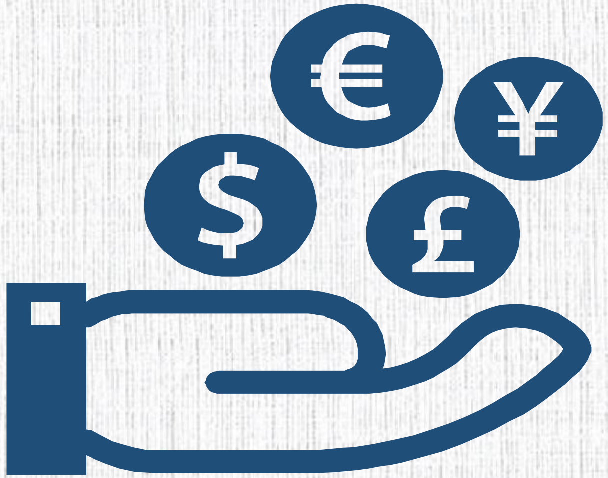
FDI Investment received during April 2000 to March 2018

State	April 2000 to April 2011	April 2000 to Mar 2018	Incremental FDI attracted during May 2011 to Mar 2018
Tamil Nadu	USD 7,341 million	USD 27,235 million	USD 19,894 million

During the period May 2011-Mar 2018, Tamil Nadu attracted more than 3 times FDI during last 6 years when compared to previous 11 years

Tamil Nadu ranked 4th in terms of actual FDI inflows during 2017

In 2017 state received USD 3.48 billion – 7.7% of total FDI received in India



Source: DIPP, Ministry of Industries and Commerce, GOI, TN Industrial Policy Note 2018-19

Tamil Nadu Exports

- Total exports of Manufactured Goods from Tamil Nadu: **US $ 29.53 billion** (2017-18) and one of **Top Three** exporting states Adding software exports of **US $ 16.93 billion**, Tamil Nadu's total exports exceeds **US $ 46.46 Billion**.
- Tamil Nadu has large presence of export-driven industries like Textiles & Garments, Leather Goods, Automobiles & Components, Electronic Hardware, etc., besides Software & BPO.
- Tamil Nadu is First in terms of number operational & Exporting SEZs (**38 SEZs** as on 30th June 2018 which exported **Rs.88848 crores** (2017-18) constituting **15.3%** of India's SEZ exports
- Tamil Nadu ranked **Second** in terms of 100% EoUs – **425 units** as on date
- Tamil Nadu – the **Third largest** Software exporter : **US $ 16.93 billion** (2017-18)
- Tamil Nadu –largest exporter of Leather products
- Accounts for **1/3rd** of India's Automobiles and parts exports

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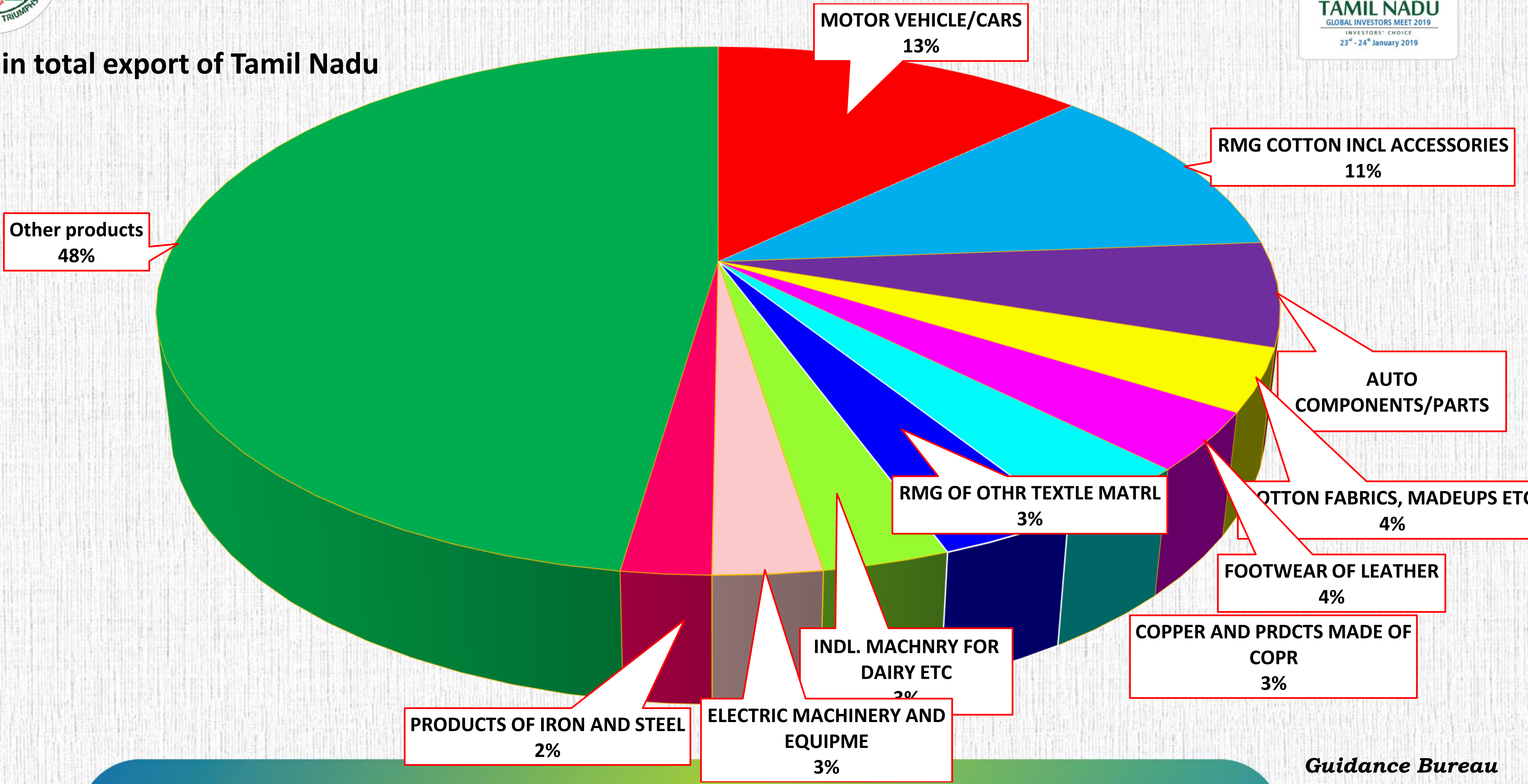
Export of Top 10 products from Tamil Nadu 2017-18

% share in total export of Tamil Nadu



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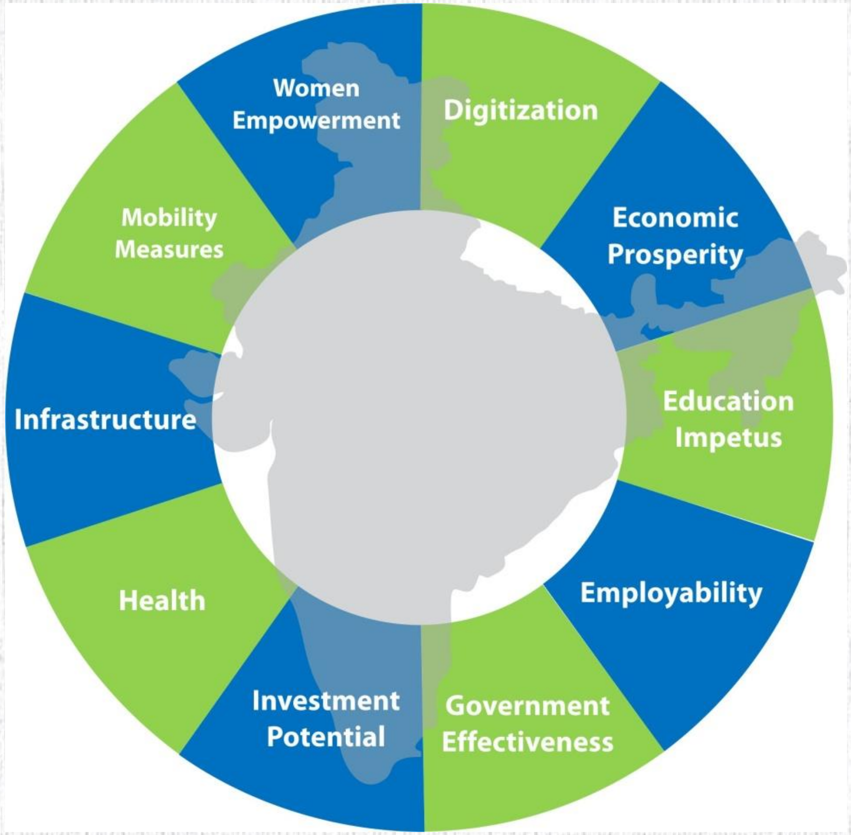
Fortune 500 companies in Tamil Nadu

At present, 61 Fortune 500 companies have base in Tamil Nadu

USA	Ford, DELL, Flextronics, Sanmina-SCI, Delphi, Visteon, Caterpillar, Honeywell, Johnson & Johnson, Citigroup, Pepsi, Dow Chemical co., Coca-Cola, Accenture, Hewlett-Packard, Microsoft, IBM, Johnson Controls, Emerson, Terex corporation and Motorola, Boeing, GE, Accenture,
Japan	Nissan, Mitsubishi, Yamaha, Bridgestone, Hitachi, Komatsu, Panasonic, Toshiba, Mitsui, Marubeni, Fujitsu, Sumitomo, Mizuho, NEC Corporation, MUFG
Germany	BMW, Daimler, Bosch, Siemens, Bayer, BASF
France	Renault, Michelin, Saint Gobain, Alstom, PSA
South Korea	Hyundai, Samsung, POSCO, Lotte
Finland	Nokia
Taiwan	Foxconn
China	Huawei
Switzerland	ABB

Snapshot of top 5 States in India per Frost & Sullivan's GIL Index for Economic Development in India, 2017

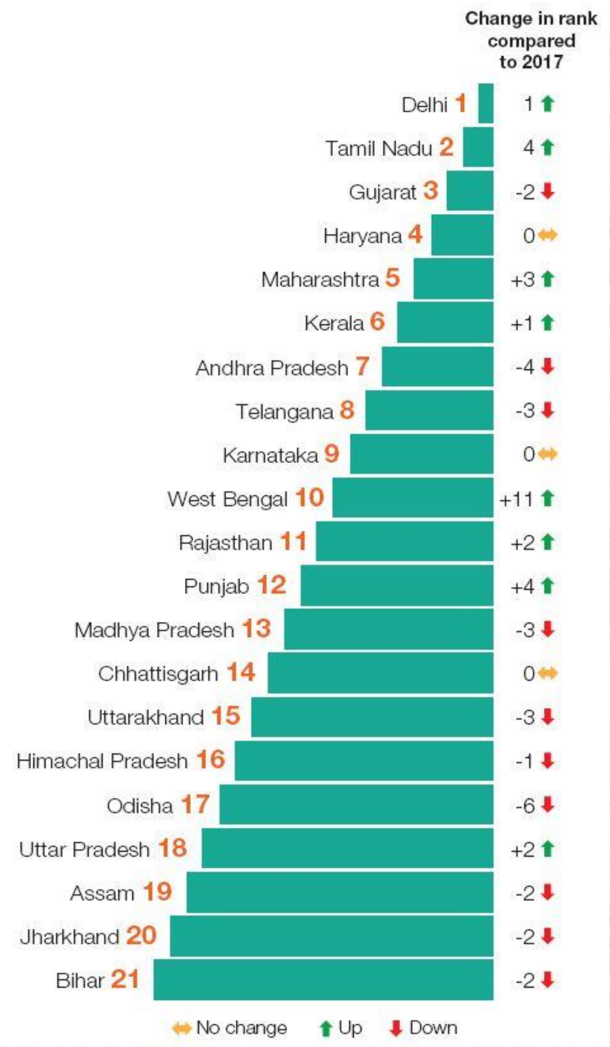


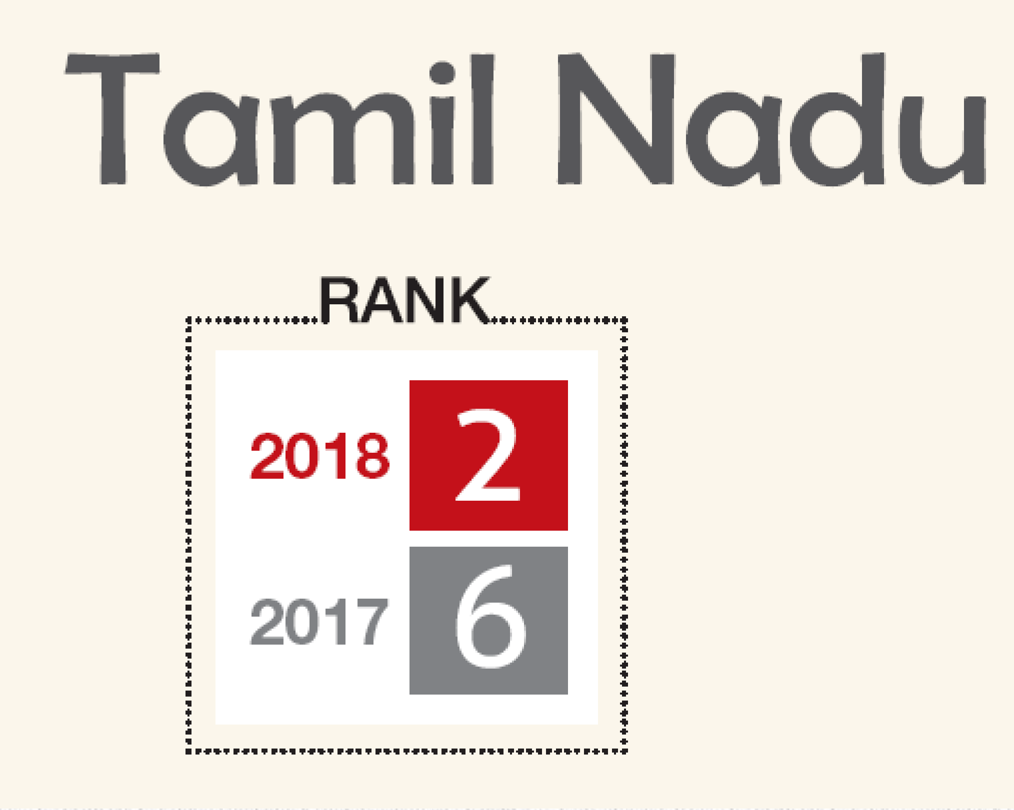
	EDI Index, 2017
Maharashtra	1
Tamil Nadu	2
Karnataka	3
Gujarat	4
Andhra Pradesh	5

NCAER N-SIPI 2018 Ranking

- Tamil Nadu is ranked **Second** in terms of State Investment Potential Index
- In 2018, Tamil Nadu has substantially improved its position to Second in terms of six parameters.
- Of this, Tamil Nadu is ranked **First** in terms of:
  - **Good Governance and Political stability**
  - **Peaceful law and order conditions**
  - **Uninterrupted power availability**
  - **Skilled manpower availability and harmonious industrial relations**, etc.

Figure 1.4 Overall rankings under N-SIPI 2018: All Six Pillars





PAI 2017-18 Ranking

10 Themes | 26 Focus Subjects | 82 Indicators

PUBLIC AFFAIRS INDEX

Governance in the States of India | 2017

Essential Infrastructure

Rank	Large States		Index
1	PB	Punjab	0.724
2	TN	Tamil Nadu	0.672
3	AP	Andhra Pradesh	0.660
4	GJ	Gujarat	0.646
5	HR	Haryana	0.632
6	MH	Maharashtra	0.609
7	KA	Karnataka	0.599
8	KL	Kerala	0.579
9	TS	Telangana	0.501
10	UP	Uttar Pradesh	0.464

Delivery of Justice

Rank	Large States		Index
1	TN	Tamil Nadu	0.725
2	KL	Kerala	0.638
3	PB	Punjab	0.609
4	AS	Assam	0.583
5	MP	Madhya Pradesh	0.581
6	HR	Haryana	0.569
7	CG	Chhattisgarh	0.546
8	WB	West Bengal	0.528
9	GJ	Gujarat	0.496

Law and Order

Rank	Large States		Index
1	TN	Tamil Nadu	0.434
2	KL	Kerala	0.431
3	GJ	Gujarat	0.423
4	MH	Maharashtra	0.372
5	AP	Andhra Pradesh	0.360
6	KA	Karnataka	0.356

Overall Rank

Rank	Large States		Index
1	KL	Kerala	0.551
2	TN	Tamil Nadu	0.543
3	GJ	Gujarat	0.536
4	KA	Karnataka	0.531
5	MH	Maharashtra	0.512

Environment

Rank	Large States		Index
1	TN	Tamil Nadu	0.829
2	KA	Karnataka	0.749
3	GJ	Gujarat	0.621
4	KL	Kerala	0.611
5	MH	Maharashtra	0.601

Tamil Nadu has a six sigma advantage for competitiveness

Fastest growing State economy
Average Growth rate: about 11%

Mature Industrial base: Leader in automobiles & parts, Electronic hardware, Textiles, IT, etc

Excellent Port and airport Logistics

- ***4 major ports at Chennai, Kamarajar (Ennore), Adani and VOC (Thoothukudi); ~7.0 million TEU capacity in Tamil Nadu;***
- ***Chennai and Kamarajar Ports serve as auto export hubs***

Well-developed Infrastructure: Power, roads, communication, etc

Manufacturing Total Cost competitiveness

Largest producer of skilled Manpower in India

- ***Annual Turn-out: More than 1.0 million Graduates (Engineering, Arts & Science), Diploma holders and ITI workers***
- ***Abundant availability of skilled manpower at competitive wage costs***
- ***Harmonious industrial Relations***

Ports Infrastructure

Chennai – the only city to have 3 modern ports with Container handling capacity 5.7 Million TEUs

Chennai has Largest Cargo Handling capacity in India

Tamil Nadu is India's second-largest economy

The State is an economic powerhouse:

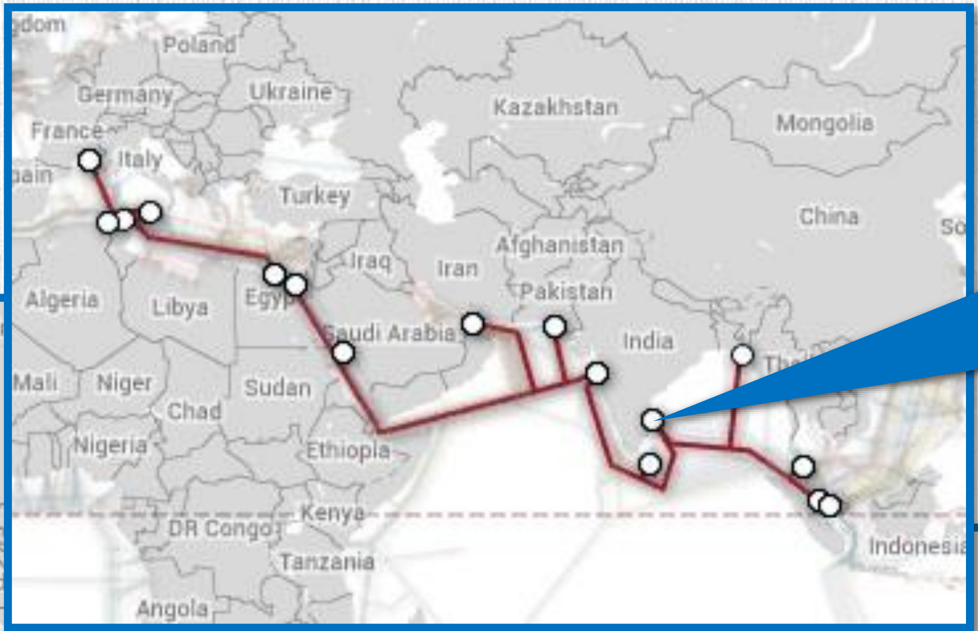
- 8.79% share of India's GDP (ranked 2nd) with a per capita income of Rs 1.2 lakhs, 31% higher than India's average
- State GDP has grown at 7.9% (constant prices) in FY 17, faster than the national growth rate of 7.1%

Infrastructure Snapshot

Installed Power Capacity	~30 GW in FY 17 (11.8% of India's total) – Power surplus state
Wireless Subscribers	~87 million subscribers in FY 17
Tele-density	129.62 in FY 17 (ranked 3rd)
National Highways	5,381 km
Ports	4 major ports 22 non-major ports
Airports	7 airports including 4 international airports

Communication Infrastructure – Largest Bandwidth and High Tele density

Presence of 3 Submarine cables in Tamil Nadu enables the privilege of very high speed utilization (14.8 Tbps) in India.



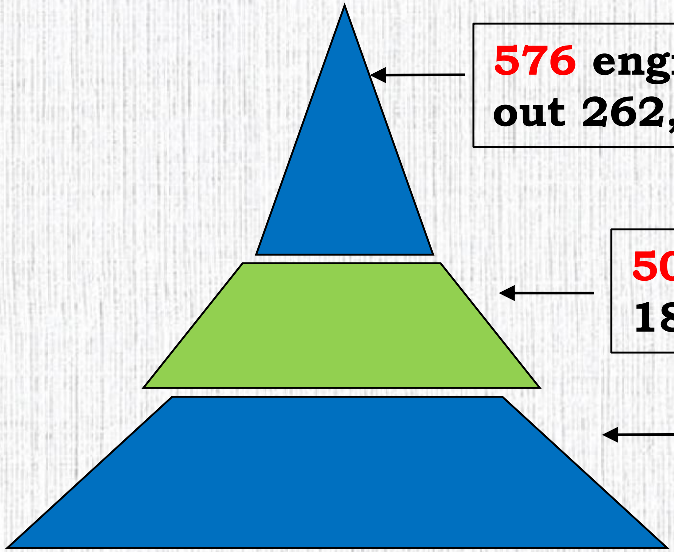
Submarine Cable 1: SeaMEWe-4
Length-20,000 Km
Carriers of Telecom between Singapore, Malaysia, Thailand, Bangladesh, India, Sri Lanka, Pakistan, United Arab Emirates, Saudi Arabia, Sudan, Egypt, Italy, Tunisia, Algeria and France

Submarine Cable 2: i2i
Length-3,200 Km
Carriers of Telecom between India (Chennai) and Singapore.

Submarine Cable 2: TIC (Tata Indicom Cable)
Length-3,175 Km
Carriers of Telecom between India (Chennai) and Singapore.

Skilled manpower availability in Tamil Nadu

- Tamil Nadu – pioneer in promoting Technical education in Private sector
- Annual Turn-out: More than 1.0 million Graduates (Engineering, Arts & Science), Diploma holders and ITI workers
- Abundant availability of skilled manpower at competitive wage costs
- Harmonious industrial Relations



576 engineering colleges - Annual turn-out 262,164 Engineering graduates

501 Polytechnics Annual turn-out: 188456 technicians

1552 Industrial training Institutes & schools: Annual turn-out: 116551 workers / operators

What does Chennai offer ?

Chennai is the 22nd largest city in the world in terms of Population (9.0 million) and the 4th largest urban area in India

- **More than 40,000 expats living in Chennai**
- **Peaceful living conditions**
- **High quality Housing for expats (beach side Houses in South Chennai)**
- **Many International Schools**
- **Excellent healthcare facilities**
- **Well-developed Entertainment facilities**
- **Modern shopping malls, etc**
- **Low cost of Living (Ranked 516 among 540 cities in the World according to Numbeo Cost of Living Index 2018)**

Focus sectors

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Textiles & Apparels

Pharmaceuticals & Biotech

Agro & Food Processing

Aerospace & Defence

Automobile and Auto

Renewable Energy

Infrastructure

Skill Development

Chemicals & Petrochemicals

IT & ITeS

Heavy Engineering

Electronics & Hardware

Automobile Industry in Chennai

Name of the company	Product	Installed Capacity
Ford (2 plants)	Cars	2,00,000
Hyundai (2 plants)	Cars	7,00,000
Nissan	Cars	2,40,000
Renault	Cars	2,40,000
BMW	Cars	14,000
PSA, France*	Cars	70,000
Mahindra and Mahindra*	SUVs and Cars	1,50,000
Daimler	Commercial Vehicles	72,000
Ashok Leyland	Commercial Vehicles	1,46,000
TAFE	Tractors	60,000
TVS Motor	Motorcycles	2.9 million
Royal Enfield	Motorcycles	1.02 million
Yamaha	Motorcycles	0.9 million
Caterpillar, Komatsu, Doosan *** Earthmoving machinery		

*Project under implementation

Automobile Industry in Chennai

Product	Installed capacity	Production 2017-18	Exports
Cars	1.64 Million	1.09 Million	3,13,388
Trucks	2,18,000	1,08,524	22,814
Two wheelers	4.82 Million	3.18 Million	0.7 Million

Current production capacity of Chennai

- **Three cars produced every minute**
- **One truck produced every 2 minutes**
- **One Motorcycle produced every 6 seconds**

- **Excellent market Potential for automobile parts manufacturing**

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Chennai: India's Largest Automobile Cluster

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Automobile & Auto Components

Ford
BMW
NISSAN
DAIMLER
RENAULT
CAPARO
HYUNDAI
TAFE
ASHOK LEYLAND
DELPHI
YAMAHA
Visteon
SAME
SAINT-GOBAIN
MICHELIN
ROYAL ENFIELD
BOSCH
Mahindra
Allison Transmission
MRF TYRES Tyres with Muscle
CATERPILLAR®
CEAT
HITACHI Inspire the Next
SCHWING AMERICA INC.
HWASHIN TECH
KOMATSU
ASAHI GLASS
APOLLO TYRES LTD
TVS
UNIPRES
TEREX
PSA PEUGEOT CITROËN
JK TYRE TOTAL CONTROL

Electronics Hardware

Chennai is second largest electronic hardware manufacturing hub in India

2nd in India

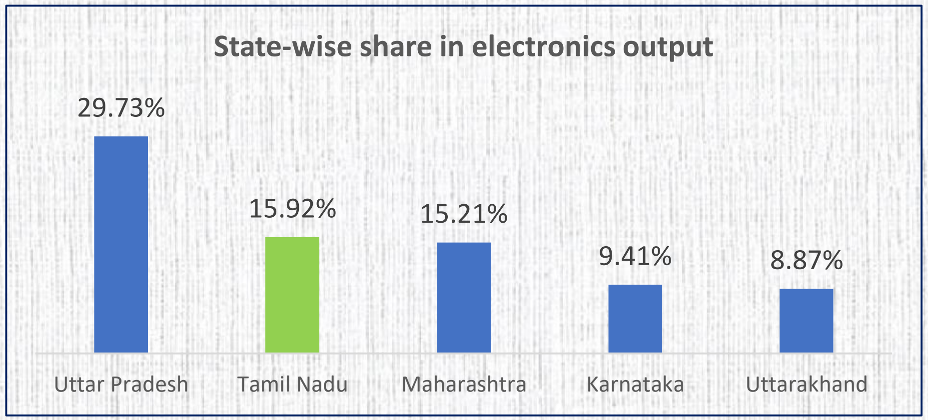
Tamil Nadu's rank in the computer, electronics and optical products manufacturing accounting for ~16% of

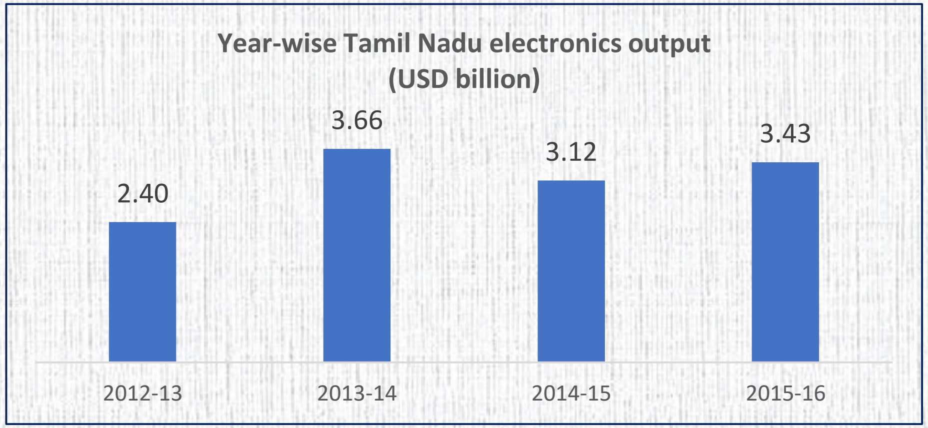
Chennai is emerging as a Centre for manufacture of mobile handsets, Telecom equipment, Computers

Presence of 20+ electronic hardware technology parks based in major IT centric SEZs of Sriperumbudur, Oragadam, & Mahindra World City

Electronic manufacturing cluster planned in Hosur, Krishnagiri and in Coimbatore

Telecom instruments (38% of the total electronics exports), electronic instruments (33%) and electronic components (11%) were the top three exported commodities from Tamil Nadu in 2017-18

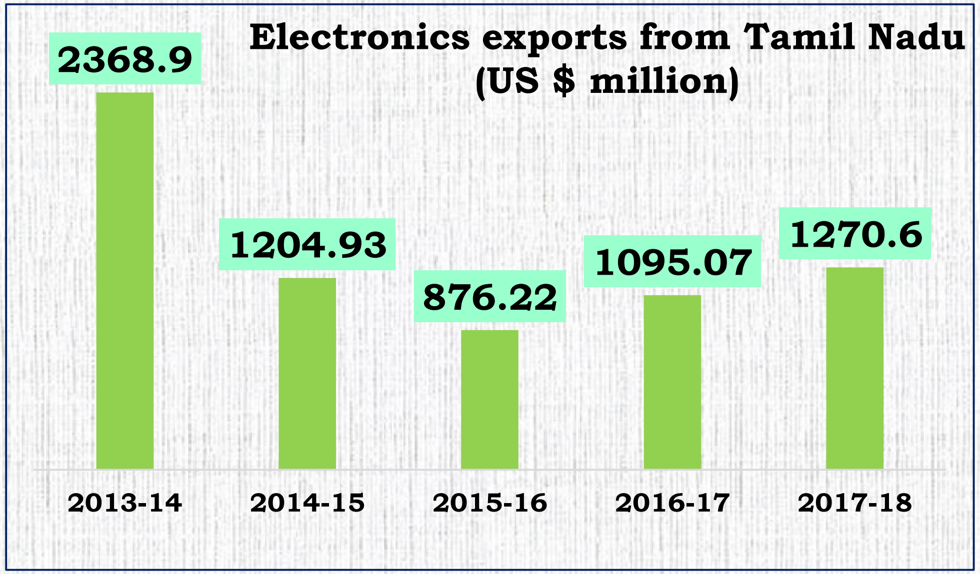


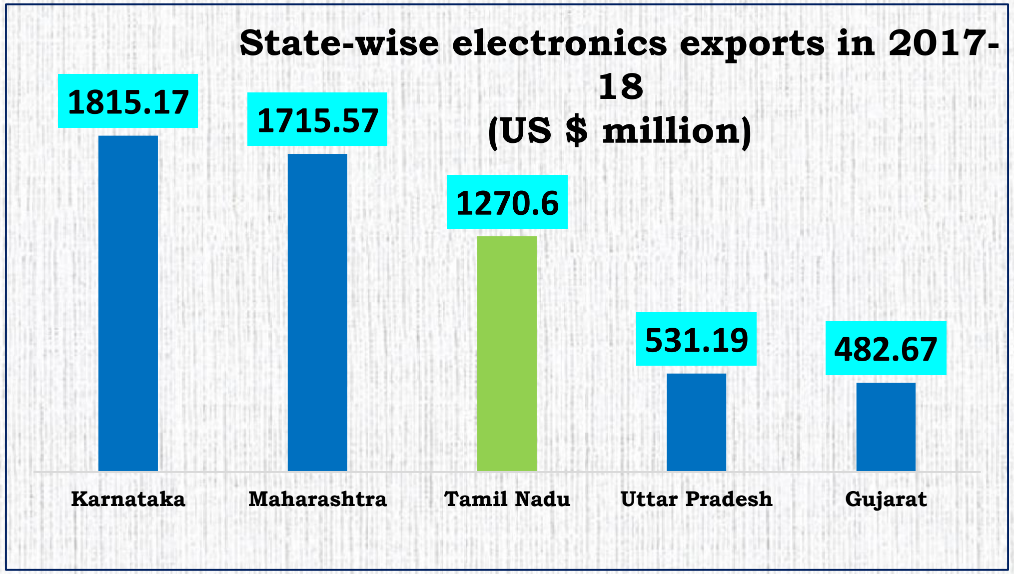


Electronics Exports from Tamil Nadu

US $ 1270.6 million

Electronics* exports from Tamil Nadu in 2017-18





Telecom instruments (38% of the total electronics exports), electronic instruments (33%) and electronic components (11%) were the top three exported commodities from Tamil Nadu in 2017-18

* Includes optical items, telecom instruments; electronics instruments; electronics components; AC, refrigeration machinery, etc.; computer hardware peripherals; consumer electronics; accumulators & batteries

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Tamil Nadu:
The Electronic Manufacturing Ecosystem

Electronic Hardware

- ALCATEL
- Honeywell
- NOKIA Connecting People
- DELL
- FOXCONN
- SAMSUNG
- ERICSSON TAKING YOU FORWARD
- PERLOS
- FLEXTRONICS
- SIEMENS
- SANMINA-SCI
- moserbaer REWRITING THE FUTURE
- MOTOROLA
- Panasonic
- Laird TECHNOLOGIES
- Salcomp POWERING THE MOBILE WORLD
- DELTA

Tamil Nadu – IT sector Overview

Revenue 2017-18

- ► Total US$ 18.51 Billion

IT Investments 2017-18

- ► Total US$ 6.15 Billion

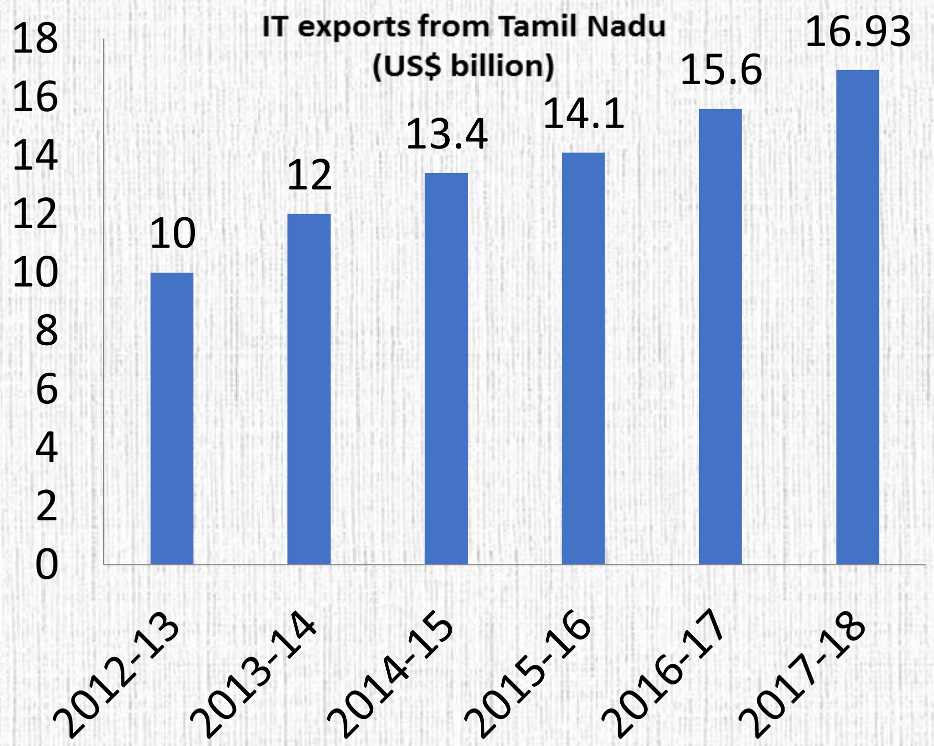
Sector growth

- ► Grows at 8.55%
- ► National average is only 7%

IT SEZ land availability

- ► ELCOSEZ developed 8 SEZ
- ► IT/ITeS promotion in major cities

IT exports from state grew at a average growth rate of 18.76% between 2012-13 and 2017-18



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Information Technology / ITeS Sector

1800+	Number of registered IT units in 2017-18
22	Approved IT Parks in the state
500,000	Directly employed in IT/ITeS companies
750,000	Indirect employment in IT/ITeS companies

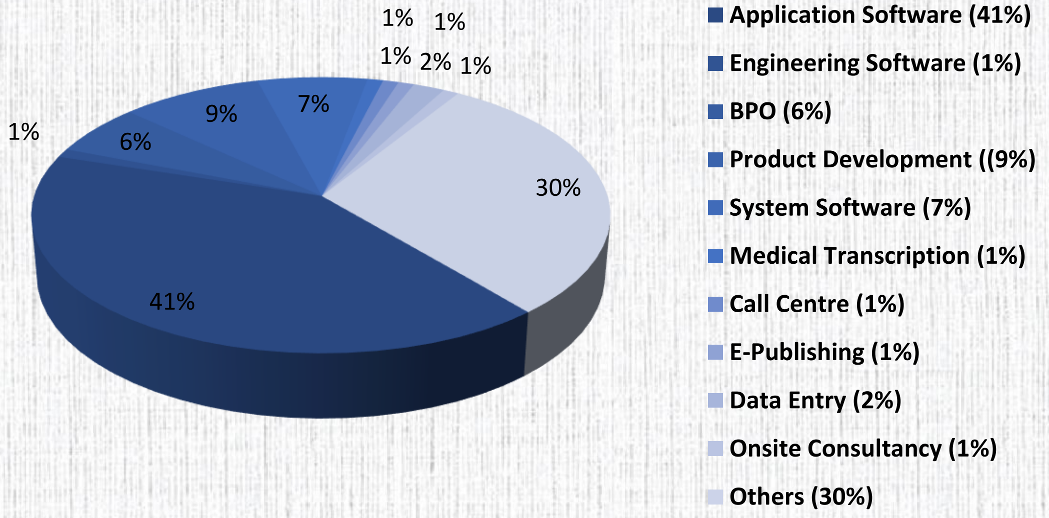
Skilled Workforce

- Largest pool of technically qualified high class IT manpower in India with 550+ engineering colleges
- 37% of total Engineering graduates are from Computer Science/ IT/ Electronics/ Communication discipline

Manpower Cost

- Abundant skilled human resource compared to developed countries leading to lower manpower cost nearly one tenth of those in developed nations, thus giving Tamil Nadu a big competitive advantage

Exports From Tamil Nadu



Major Players

Agro and Food Processing opportunities

Contributes ~3% to India's food grain produce, ~7% to India's vegetable produce and ~12% to India's fruit produce

2nd	3rd	5th	2nd
Largest Producer of Poultry & Dairy in India	Largest Producer of Tea & Coffee in India	Largest Producer of Fruits in India	Rank in registered Food processing unit factories

- **Contributes 7% in India's food processing output**
- **One of the largest contributors to Fish production with 7.07 lakh MT (2016)**
- **Leading Producer of Species and Cashew nuts**

Source: http://www.mospi.gov.in/statistical-year-book-india/2017/171

Textiles & Garment Exports from Tamilnadu

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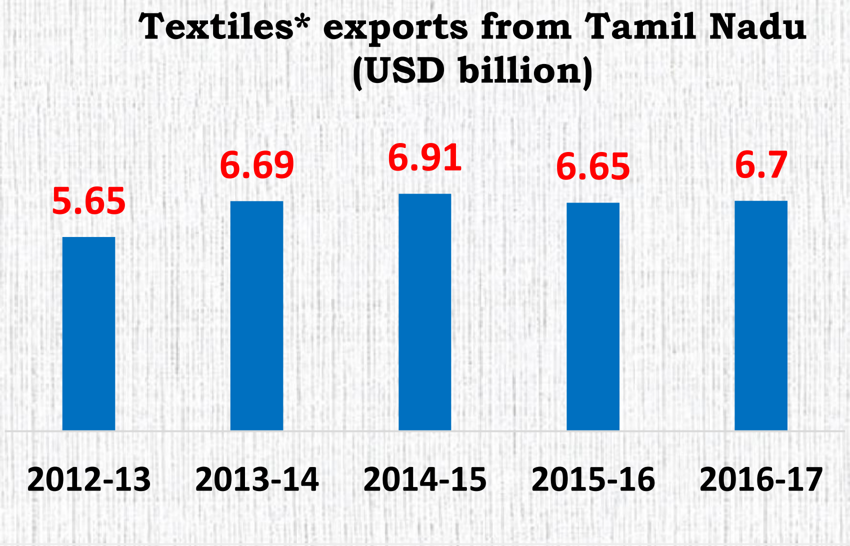
Textile Export Destination from Tamil Nadu

Value of Textiles exports from Tamil Nadu



Tamil Nadu, the largest hub of textiles & garment in India

contributes to 20% of India's total Export of Readymade Garments worth US $ 6.7 Billon

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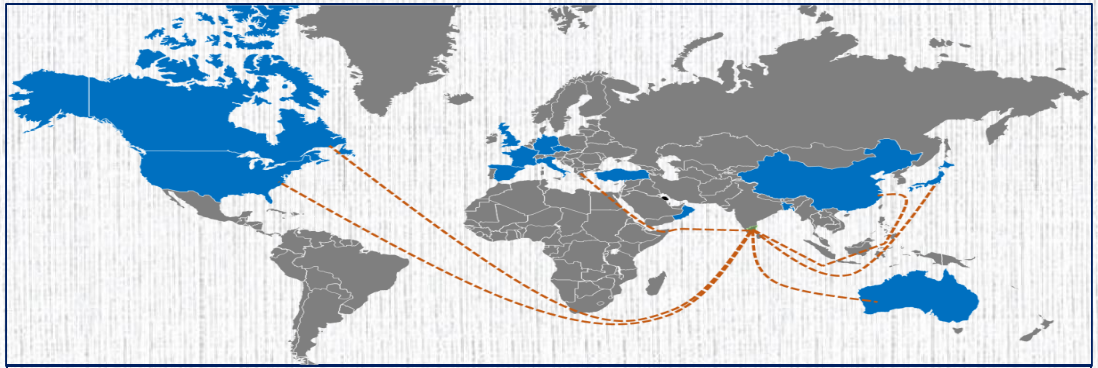
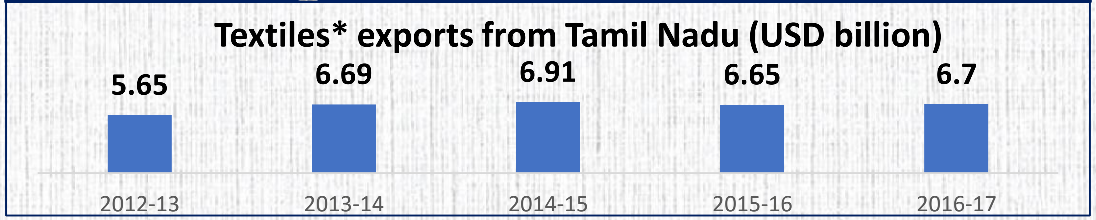
Textiles & Apparels – Overview

Tamil Nadu is the 'Yarn Bowl' of India produces ~40 % of total Yarn in India	Tirupur is the biggest Knitting cluster in India - 'Knitting City'	Coimbatore is the 'Manchester of South India'
1st Rank in Production of Cotton Yarns	1st Rank in Export of Cotton Yarns	2nd Production of Blended Yarn

Tamil Nadu contributes 1/3rd of the textile business of India

- **Tamil Nadu has more than 50% of India's textile mills**
- **The State is also a leading producer of Technical textiles with units pre-dominantly situated circa Chennai & Coimbatore**
- **Tamil Nadu - the largest hub of textiles & garment in India with 20% of India's Export of RMG**
- **Tamil Nadu Employs about 35% of the workforce in textiles sector constituting about 28% of total employment in India's Textile & Garment sector**



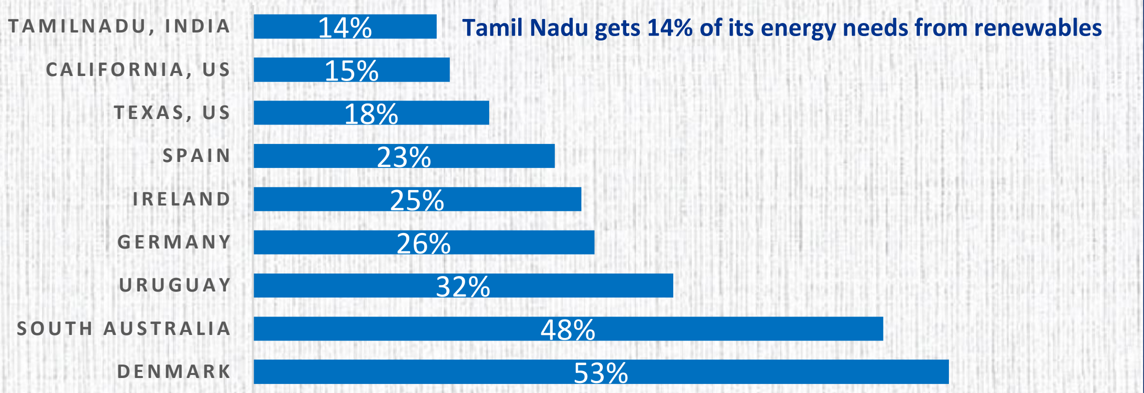


Source: DGCIS, GoI, GoTN – Textiles department

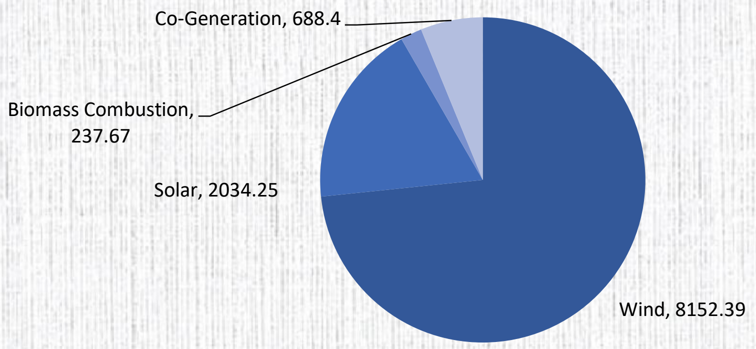
Renewable Energy

Leader in Renewable energy sector with a total installed capacity of 11,113 MW as on Mar 2018

Tamil Nadu is among the top markets globally to have large share of renewable power generation



Break-up of renewable energy sources (MW)



Tamil Nadu has harnessed around 2,905 million units of Solar energy

There are 29 sugar plants spread across the State in the delta region, Districts of Erode, Coimbatore, Tirunelveli etc. that account for the capacity of cogen power of 659 MW

Chemicals and Petrochemicals

~6% — **Share in India's total chemicals output**

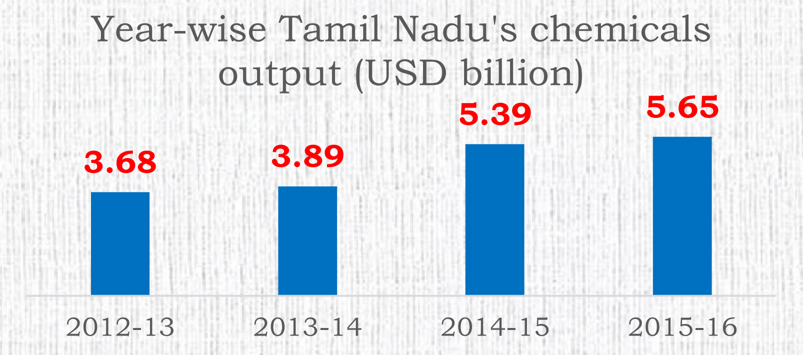
2588 — **Factories in chemical sector in TN**

Leader amongst south Indian states producing **INR 18,000 crore worth of plastics and employing 10 Lakh+ people**

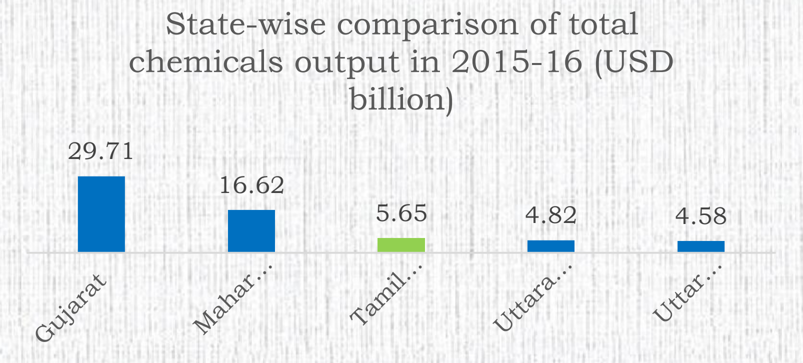
A Polymer Industries Park is being established by TIDCO in Tiruvallur district

- Area – 306 acres in Ponneri Taluk
- Estimated cost – USD 44 million
- Site development work to commence in September 2018
- Infrastructure created will be able to accommodate 84 medium and small scale plastic component manufacturing units

The chemicals output grew at a **CAGR of 15.3%** between 2012-13 & 2015-16



Ranked 3rd in total chemicals output in India in 2015-16



Source: ASI 2015-16

Chemicals and Petrochemicals

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Major players in Tamil Nadu

- SAINT-GOBAIN – The future of glass. Since 1665.
- ASAHI INDIA
- CPCL
- NAGARJUNA GROUP
- SANMAR
- ADITYA BIRLA – TANFAC
- DCW LIMITED
- TAC
- Tamilnadu Petroproducts Ltd.
- BASF – The Chemical Company
- MADRAS FERTILIZERS LIMITED
- Orchid Chemicals & Pharmaceuticals Ltd.
- SRF – MAKING OUR NATION PROUD
- DCM SHRIRAM
- PPG asian paints – Automotive, Marine and Speciality Coatings
- KILBURN CHEMICALS LIMITED
- Clariant

What does the State Government offer?

- Land – in different Industrial parks and SEZ
- Structured Incentives package of support
- Infrastructure: Quality Power and Water supply
- Single Window Facilitation & composite approval on a fast-track mode within 30 days.

Land availability in industrial parks

Industrial plots with infrastructure available in following Industrial Parks:

- Ascendas One hub Industrial Township near Chennai
- Sumitomo-Mahindra industrial park near Chennai
- Sojitz Japanese industrial park near Chennai
- SIPCOT Industrial park (Vallam-Vadagal)
- SIPCOT Electronic hardware SEZ in Sriperumpudur
- SIPCOT Vendors industrial park in Hosur near Bangalore
- GMR Industrial park near Hosur
- SIPCOT and private Industrial parks / SEZ

- All the above industrial parks have infrastructure facilities namely Electricity & water supply, Road connectivity, Drainage & waste disposal, etc

Incentives package to investors

- Customized incentives package to investors based on investment, employment and project location. The package may include:

Government of Tamil Nadu incentives:

- SGST based refunds on sales
- Stamp duty concessions on land allotment
- Electricity Tax exemption
- Capital Subsidy
- Training subsidy for training workers

Federal incentives (for SEZ projects)

- Income tax Holiday / concession for 15 years
- Exemption from Import duty / Customs duty
- GST exemption

Tamil Nadu Guidance Bureau Role

1. Investment promotion: Identify companies to attract them to Tamil Nadu
2. Investment tracking and follow up of specific projects till projects are commissioned
3. Apprise prospective investors on policies and prepare custom packages to accommodate specific requirements
4. Use innovative digital marketing technologies to promote the State
5. Single Window facilitation: Hand-holding support to investors
6. Build long term partnerships with investors by continually facilitating and identifying new areas of opportunities
7. Collaborate with Industry Associations & Trade Bodies to create awareness on state's openness to invite investors
8. Partner with leading multilateral organizations to promote the brand of the Summit globally

IFC Washington & Invest India ranked Guidance Bureau – India's top 3 best Investment Promotion Agencies

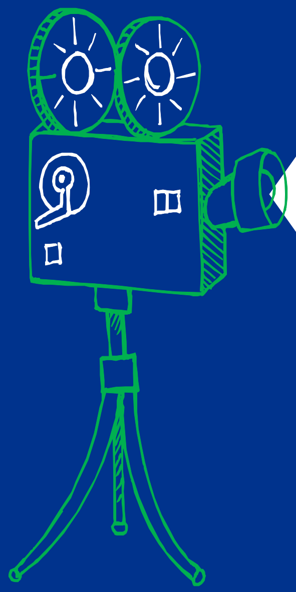
Single Window Facilitation for fast track approvals within 30 days

- Single window online portal www.easybusiness.tn.gov.in
- Recording & addressing investor grievances
- Receiving electronic payment of fees from enterprises
- All applications are processed as per Business facilitation act
- Submission of documents for obtaining business approvals
- Clarifications raised by authorities to enterprises and receiving their responses
- Tracking & Monitoring the status of applications submitted for processing
- Allowing enterprises to download final clearances from the system

Global Investors Meet
GIM-2019

23rd – 24th January 2019
Chennai Trade Centre

About GIM 2019



- With a view to build on the Government's commitment in maintaining the state's position as one of India's most preferred investment destinations, a Global Investors Meet is being organized on 23rd and 24th January, 2019, at Chennai Trade Centre, Chennai, Tamil Nadu
- Event will showcase Tamil Nadu's potential business opportunities to the investors as well as highlighting the rich cultural heritage of Tamil Nadu

One Summit. Many objectives...

TAMIL NADU
GLOBAL INVESTORS MEET 2019
INVESTORS' CHOICE
23rd - 24th January 2019

Showcase Ease of Doing Business initiatives & Investor friendliness

Involve international diaspora and top CEOs, sign MoUs

Showcase livability

Seminars and panel discussions on focus sectors

Showcase investible projects across sectors

Showcasing state's rich culture & Reinforce coherent it's brand image

Objectives of GIM 2019

GIM 2019 – Benefits for participation

Gain understanding of the investment scenario in India and Tamil Nadu

Interactive sessions with policy makers, senior Govt. officials and thought leaders

Business and Thematic seminars providing insights of the latest happenings across the globe

Breakout sessions with focused B2B and B2G meetings

A sneak peek into the rich cultural heritage of Tamil Nadu

GIM 2019 – Participant profiles

Global leaders & Heads of States	CEO's of International and National Corporations	Policy Makers
Trade Associations and Chambers of Commerce	Academicians and Thought Leaders	Entrepreneurs

Central and State Government functionaries / authorities, Ministers etc.,

GIM 2019 – Key activities & Delegate Support

TAMIL NADU
GLOBAL INVESTORS MEET 2019
INVESTORS' CHOICE
23rd - 24th January 2019

Participation fees
NIL

Air tickets and accommodation support through travel partners

Tamil Nadu Government

Signing of MOU's

Investors/ Entrepreneurs

Local domestic logistics support

Domestic tours and food festivals hosted

Industrial Policy/Focus Sector specific policies support and Incentives explained

GIM 2015 - Highlights

- **Under the guidance of then Hon’ble Chief Minister J Jayalalithaa, the first edition of the Global Investors Meet in 2015 was a resounding success**
- **During the two-day summit, the Tamil Nadu government attracted investments worth more than INR 2 lakh crores**
- **Around 5,000 delegates from across the world participated with nine partner ries**
- **About 100 MoUs were signed over the course of two days**

THANK YOU