**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, export 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 (AGNI), India Investment Grid (IIG) and Industrial Information System (IIS).

**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 India is a 150+ member team with an annual revenue of INR 1,740 crores (FY 2018-19). JLL India has an extensive presence across 15 major cities (Mumbai, Delhi NCT, Bengaluru, Pune, Chennai, Hyderabad, Kolkata, Ahmedabad, Kochi and Coimbatore) and over 130 tier II & III markets with a cumulative strength of 12,000 professionals.

JLL 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.

**For Business Enquiries, please contact:**

**Yogesh Shaveda**
Head - Industrial Services
JLL India
Yogesh.shaveda@ap.jll.com
+91 96197 11280

**Sanchi Padia**
Senior Manager
Invest India
Sanchi.padia@investindia.org.in

**Amita Das**
Assistant Manager
Industrial Services, JLL India
Amita.das@jll.com

**Charmy Shah**
Executive - Industrial Services
JLL India
Charmy.shah@jll.com

**Chandranath Day**
Head - India Operations, BD & Consulting, JLL India
Chandranath.day@jll.com

Special thanks to Debadatta Dutta and Sujash Bera for their guidance.

**Acknowledgements:** Marina Arvand, Sumita Rajput, Tanus Kumar, Deepa Upadhyay & all the industry experts who shared their valuable insights on the various aspects of the sector.

**JLL India** is the trade name, and a registered trademark, of Jones Lang LaSalle Incorporated. For further information, visit jll.com

For further information, please visit https://www.investindia.gov.in/
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**

<table>
<thead>
<tr>
<th>Metric</th>
<th>Rank</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>GSDP Growth (FY 18)</td>
<td></td>
<td>7.9%</td>
</tr>
<tr>
<td>Logistic Performance Index (2019)</td>
<td></td>
<td>3rd Rank</td>
</tr>
<tr>
<td>No. of Factories in State (FY 18)</td>
<td></td>
<td>8,891; 11th Rank</td>
</tr>
<tr>
<td>HDI Rank (2018)</td>
<td></td>
<td>3rd Rank</td>
</tr>
<tr>
<td>Logistic Performance Index (2019)</td>
<td></td>
<td>4th Rank</td>
</tr>
<tr>
<td>State's contribution to India's Exports (FY 19)</td>
<td></td>
<td>4.9%</td>
</tr>
</tbody>
</table>

**STATE SNAPSHOT - RAJASTHAN**

<table>
<thead>
<tr>
<th>Metric</th>
<th>Rank</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>GSDP Growth (2016-17)</td>
<td></td>
<td>5.5% 23rd Rank</td>
</tr>
<tr>
<td>Logistic Performance Index (2019)</td>
<td></td>
<td>4th Rank</td>
</tr>
<tr>
<td>No. of Factories in State (FY 18)</td>
<td></td>
<td>9,212; 10th Rank</td>
</tr>
<tr>
<td>HDI Rank (2018)</td>
<td></td>
<td>13th Rank</td>
</tr>
<tr>
<td>Logistic Performance Index (2019)</td>
<td></td>
<td>8th Rank; INR 321 Bn</td>
</tr>
<tr>
<td>State's contribution to India's Exports (FY 19)</td>
<td></td>
<td>1.8%</td>
</tr>
</tbody>
</table>

- **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 the 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

Note: Excludes Union Territories
**WHY NH48**

### Haryana contributes
- 20% India’s Largest Automobile OEMs
- 3rd Largest exporter of software
- 50% of Passenger Cars manufacturing in India
- 60% Motorcycles manufacturing in India

### Rajasthan contributes
- >100 Auto component manufacturing unit.
- 2nd Largest mineral producing state, sole producer of lead & zinc
- 1st Largest producer of blended fabric & wool
- 1st Only state with all raw materials for ceramics & glass industry – silica, feldspar, ball clay, etc.

- 2 out of 8 manufacturing cities in Phase 1 of DMIC are on NH48.
- NH48 is the 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 transhipment 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**

### Auto & Ancilaries

**NH48: Largest auto ecosystem in India**
- Gurugram-Manesar-Bawal belt is known as “Auto Hub” which accounts for 56% of 4-wheelers & 37% of 2-wheelers manufactured in India
- Maruti Suzuki, Hero Motocorp, Suzuki Motorcycles, Taiyo Daichii, Mitsubishi, Jonson Matthey, Minda Group, Kehin, Suzuki powertrain, Munjal Showa, Denso, HMT, JBM, Musashi, Harley Davidson

### IT/ITES

**Gurugram has 1500+ startup companies**
- Zomato, Shopclues, Uber, Facebook, Google

### FMCG

**Significant presence of large FMCG sector**
- Unicharm, British Health Products, Gillette India

### Ceramic and Glass

**Industrial Zone at Ghidhli by RICCO**
- First such attempt in India
- Major players: Saint Gobain, Rajrishi, Jaqar, Parryware, Roa, JCP

### ESDM

**Launch of Electronics Cluster of 100 acres at Bhiwadi**
- A few electronics companies starting operations in Gurugram, Bawal and Manesar

### Emerging Sectors

**Major players:** Fien Industries, Deki Electronics, Elin Electronics, Vsun

**Electric Vehicles and Batteries:** Dedicated policy under formulation

**Prominent industrial areas for greenfield and secondary transactions**

<table>
<thead>
<tr>
<th>Industrial Park</th>
<th>Total Area (Acres)</th>
<th>Major Occupiers</th>
<th>Remarks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Udhyog Vihar, Gurugram</td>
<td>1,125</td>
<td>Maruti Suzuki, Micromax, Sun Pharmaceuticals, Euronics India</td>
<td>Industrial estate having more than 1,200 industrial &amp; commercial units &amp; is developed in 6 phases.</td>
</tr>
<tr>
<td>IMT Bawal</td>
<td>1200</td>
<td>Harley-Davidson, Minda Furukawa Electric, Macro Group, POSCO, Musashi Auto Parts</td>
<td>Focused Sectors: Auto &amp; Ancillaries, Engineering.</td>
</tr>
<tr>
<td>IMT Nansar</td>
<td>2,087</td>
<td>Maruti Suzuki, Bater, Honda, Lixure</td>
<td>Focused Sectors: Auto &amp; Ancillaries, Engineering.</td>
</tr>
<tr>
<td>Export Promotional Industrial Park (EPPI), Neemrana</td>
<td>107</td>
<td>Over 150 export – oriented units</td>
<td>Largest Export Park in Northern India with export oriented manufacturing facilities for Gems and Jewellery, Electronics, Garment, Textiles, Engineering, Leather goods &amp; IT Park.</td>
</tr>
<tr>
<td>RICO Industrial Park, Neemrana (Phase 1 &amp; 2)</td>
<td>160+315</td>
<td>Havells, Alchem, Parin, SEI, Textiles, Herohot Corp</td>
<td>Focused Sectors: Auto &amp; Ancillaries, Pharmaceuticals, Electronics.</td>
</tr>
<tr>
<td>Japanese Industrial Zone, RICO Neemrana</td>
<td>1,167</td>
<td>Daikin, Nissan Brakes, Miken India, Kokoku Intachi, Taiyo India, Nippon, NIDEC</td>
<td>Joint venture between RICO &amp; JETRO: Encourage Japanes investments through streamlined license process.</td>
</tr>
<tr>
<td>RICO Industrial Park, Ghidhli</td>
<td>1,700</td>
<td>Havells, Indus Pharma, Urolok Industries, Glocora, Lloyd</td>
<td>Focused Sectors: Glass &amp; Ceramic industries, General Industries.</td>
</tr>
<tr>
<td>RICO Industrial Park, Karol</td>
<td>527</td>
<td>Kalpax Technologies, Gras Engineering Tools, Bhagwati Products, Capstone Polywave</td>
<td>Auto Zone, EMC zone and General zone.</td>
</tr>
</tbody>
</table>

**Note:** The major industrial corridors can be identified along NH48 as Gurugram, Bhiwadi, Neemrana, Ghidhli, 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.
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.

"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."

"India is about to see a significant change in its emissions strategy, from Bharat Stage IV to Bharat Stage V 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

"Har Nishith Sahai, Commercial Director, Johnson Matthey"