J&K at a Glance

57 Industrial Estates

1st in production of apple, walnut, almond in India

2nd in production of wool in India

3 Perennial Rivers

1st in production of saffron in India

2 Airports

3 Agro-climatic Zones
J&K at a Glance

54.5% contribution of Services towards GSDP
- Hospitality & Tourism
- Transport & Communication
- Financial Services & Real Estate

66% of the population between working age of 15-59 years

28% contribution of Manufacturing towards GSDP
- Manufacturing
- Mining & Quarrying
- Construction & Utilities

6000+ Acres of Industrial Land Bank

17.5% contribution of Agriculture towards GSDP
- Crops & Livestock
- Forestry & Logging
- Fishing & Aquaculture
- Horticulture, Sericulture & Floriculture

Vibrant Tourism Ecosystem

Investor Friendly Policies with Focus on Ease of Doing Business

Lowest industrial power tariff regime
Focus Sectors

Policy Framework and enabling investment climate
Focus Sectors

14 Focus Sectors displaying Strengths and Aspirations of J&K

Tourism & Hospitality
Film Tourism
Horticulture & Post Harvest Management
Agro & Food Processing
Milk, Poultry, Fisheries & Wool Production

Agriculture & Mulberry Production for Silk
Herbal & Medicinal Plants
Health & Pharmaceutical
Manufacturing
IT & ITES

Renewable Energy
Infrastructure & Real Estate
Handloom & Handicraft
Education & Skill Development
Key Sectoral Highlights
- One of the North India’s most visited tourist destination
- UT home to Himalayas, Lakes, Wetlands & Meadows
- Gulmarg Ski Resort and Patni Top Gondola ride
- World renowned spiritual destinations such as Shri Maa Vaishno Devi, Shri Amarnath, Hazratbal

Current Scenario
Visitors (in 2017) 14.6 mn.

Opportunities
Vast Potential to cater to diverse group of Tourists
Focus Sector
Film Tourism

Key Sectoral Highlights
- Haider, Fanaa, Bajrangi Bhaijan shot in J&K
- Countless scenic locations for film shooting – Valleys, Peaks, Heritage sites, waterfalls
- Single window clearances for film shooting

Current Scenario
Scenic Locations
- Gulmarg, Betab Valley, Dal lake
- ~20 Films shot per year
- 30+ Cine Screens

Opportunities
Reviving Bollywood’s favourite film shooting destination
Focus Sector
Agriculture, Horticulture, Floriculture & Food Processing

Key Sectoral Highlights

- Largest producer of Apple, Walnut, Cherry and Almond in India
- 3 agro-climatic zones enable cultivation of unique produce like Saffron, Berries, Figs and Special variety of Basmati rice
- Conducive climate for rich floriculture

Current Scenario (2019-20)

- 19.80 Lakh MT Apples
- 2.7 Lakh MT Walnuts
- 7.4 MT Saffron
- 0.15 Lakh MT Cherry
- 16 Food Processing Units
- 11 Walnut Processing Units
- 1.16 Lakh MT CA Storage available
- ~5000 Acre Area under Organic Farming
- 4 Food Parks
Focus Sector
Agriculture, Horticulture, Floriculture & Food Processing

Opportunities

- 1% Apples processed currently
- 25% Walnut processed currently
- 35 MT Total demand of Saffron in India
- 4 lakh MT Total demand for CA storage

J&K high density plantation of Apples to double the production

Potential to be major food processing hub

- Processing Units
- Cold Chain & CA storage facilities
- Integrated Packaging Houses
- Centre of Excellence (CoE)
- Implementation of Agri-Tech Solutions
Key Sectoral Highlights

- 2nd largest producer of wool with production of 7,218 MT
- Over 10% average growth in production of milk during the past 5 years
- Largest Trout fish producer with 600 MT production

Current Scenario

- Population consumes meat/egg: 84%
- 92 lakh broiler chicken imported
- 95 crore eggs imported
- 3,000+ Tonnes of wool unprocessed in 2018

Opportunities

- Huge captive demand for animal products
- Fish and Poultry farms
- Egg and Meat Processing Plants
- Wool Processing Plants
- Cold Chain
Focus Sector
Sericulture

Key Sectoral Highlights
- One of the finest quality silk producer worldwide
- One of the oldest traditional cottage industry in J&K

Current Scenario

- 30,894 Families Involved
- 173 Mulberry Nurseries
- 20 Cr. Annual Income
- 1,035 MT Cocoons Produced

Opportunities
- Very low level of value addition due to lack of adequate reeling units
- More than 70% of the raw cocoon is exported outside the UT.

Immense potential of moving up in the value chain

- Integrated Rearing, Reeling & Weaving Unit
- Cold storage for Cocoon Preservation
- Cocoon Reeling Units
- Filature Units
Key Sectoral Highlights

- Diverse Agro-Geo climate for high altitude medicinal plants
- More than 300 medicinal plant species found

Current Scenario

6 Herbal Gardens
617 Ayurvedic and Unani Units

Opportunities

- Ever increasing awareness about benefits of Ayurvedic treatment
- J&K has a distinct positioning of pristine natural resources

Unexplored treasure of Ayurveda

Mandi of Medicinal Plants on PPP Mode
Specialized AYUSH Wellness centres
Cluster mode cultivation of Medicinal and herbal plants
Processing units

Focus Sector
Herbal and Medicinal Plants
**Focus Sector**

Healthcare and Pharmaceuticals

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**Key Sectoral Highlights**

- Ranked 7th in India Health Index in 2016-17 & 2017-18
- Presence of Pharma clusters in Samba and Bari Brahmana

**Current Scenario**

50+ Pharmaceutical companies

85% of healthcare under Government

**Opportunities**

Provision of high quality Health and Medical facilities

- Pharma Park
- Medi City
- Medical Education Development
- Super Specialty Hospitals
- R&D Facility
Key Sectoral Highlights

- Ample availability of mineral and agriculture raw material
- Mineral rich land – Limestone, Gypsum, Quartzite, Dolomite, Bauxite
- Flourishing industrial ecosystem in 57 industrial estates

Current Scenario

60+ Large units  
25,000+ MSME units  
1 Textile Park in Kathua

Opportunities

Untapped potential in Manufacturing and Mining

- Textile Park
- Light Engineering
- High Precision Engineering Equipment
- Willow bat manufacturing
- Mining
Key Sectoral Highlights

- 6.6 mn Internet Subscribers and over 10 mn. Mobile users
- Tech Savvy population with Salubrious climate suitable for IT industries,
  Good quality of life

Current Scenario

2,400+ functional CSCs

50+ IT & BPO Units

20,000+ People employed

Opportunities

High quality, Tech-Savvy Human Resource

BPO in 20 districts

2 IT Parks in Jammu and Srinagar

Innovation and Incubation Hubs

Software Technology Parks
**Key Sectoral Highlights**

- J&K accounts for 10.25% of India’s total hydel power production
- Three perennial river basins – Chenab, Jhelum & Ravi

**Current Scenario**

- **14,867 MW** Hydro Energy Potential
- **23%** Hydro Energy Harnessed
- **~5** Global Horizontal Irradiance (kwh/m²/ day)

**Opportunities**

- Untapped potential to harness remaining 77% of Hydro Energy

- Small Hydro Power projects
- Hydro Power plants
- 3 solar plants identified (20 MW)
- Energy Storage
**Key Sectoral Highlights**

- Airport expansion in Jammu and Srinagar, and ICD in Samba
- 356 km rail link from Jammu to Baramulla by 2022
- Upcoming projects – Ring road, Metro, Lake and River front development

**Current Targets**

- 1 Lakh+ Houses by 2022
- 4000 kms Road Network by 2022
- 48 kms Metro Network by 2025
- 11 Proposed Small Airports
- 4 Himalayan Tourist circuits

**Opportunities**

*Massive investment in infrastructure is on the anvil*

- Airports
- Roads and Highways
- Metro Projects
- Urban Mobility
- Housing
- Waterfront beautification
Focus Sector
Handloom and Handicraft

Key Sectoral Highlights
- Pashmina, Kani and Raffle shawls, Tweed Fabrics
- Major handicraft items include Carpets, Papier Machie, Crewel, Chain Stitch

Current Scenario

Weavers employed | Handloom exports in last 5 years | Artisans employed | Handicraft exports in last 5 years
---|---|---|---
43,000 | 1000+ Cr. | 3.5 Lakh | 4000+ Cr.

Opportunities

Impetus to age old tradition

Craft city, Craft Parks, Urban Haats, Common Facility Centres
Focus Sector
Education and Skill Development

Key Sectoral Highlights

- Home to Institutions of National importance - IIT, IIM, IIMC, NIT etc.
- Incremental demand for about 6.39 lakhs skilled resources in different sectors of Jammu and Kashmir. (NSDC)

Current Scenario

31%
Gross Enrolment Ratio in Higher Education

139
ITI's & Polytechnic Colleges

12
Universities

Opportunities

Opportunities for Residential Schools & Technical Institutes

- Residential Schools
- Smart Schools
- Education Infrastructure in PPP mode
- Collaboration with Foreign Universities
- Industry Academia partnership
Policy Framework and enabling investment climate
Why Jammu and Kashmir

Progressive, competitive and investor friendly policies

Easy to do Business and conducive working environment

Industrial and sector specific Land Bank available

Pristine and pollution free environment

Competitive cost of doing business

Large captive market, Easy access to consumers of neighbouring states

Skilled Labour – Institutes of national repute ensuring high quality human resources

Robust Infrastructure – Well connected through air, rail & road

Large captive market, Easy access to consumers of neighbouring states

Pristine and pollution free environment

Competitive cost of doing business

Large captive market, Easy access to consumers of neighbouring states

Skilled Labour – Institutes of national repute ensuring high quality human resources

Robust Infrastructure – Well connected through air, rail & road
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<tr>
<th>1</th>
<th>J&amp;K Industrial Promotion Policy 2020</th>
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<td>1a</td>
<td>J&amp;K Industrial Policy 2020 (for MSME units)</td>
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<td>1b</td>
<td>J&amp;K Industrial Policy 2020 (for Large &amp; Mega units)</td>
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<td>2</td>
<td>J&amp;K Pharmaceutical Policy 2020</td>
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<tr>
<td>3</td>
<td>Healthcare and AYUSH Care Investment Policy 2020</td>
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<td>4</td>
<td>J&amp;K Tourism Policy 2020</td>
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<td>J&amp;K Agriculture, Horticulture &amp; Food Processing Policy 2020</td>
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<td>J&amp;K Policy for Sericulture Development for Bivoltine Silk 2020</td>
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<td>J&amp;K Film Policy 2020</td>
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<td>J&amp;K Hydropower and Renewable Energy 2020</td>
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<td>J&amp;K Wool Processing, Handloom &amp; Handicraft Policy 2020</td>
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<td>13</td>
<td>J&amp;K IT/ITES Policy 2020</td>
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<td>J&amp;K Captive Power Plant and Open Access Policy 2020</td>
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Industrial Policy Highlights

Policies in line with Intrinsic strengths of J&K

- Barrier Free Movement
- Attractive Tax Exemptions
- Green Industrialization
- Assistance in Capital Investment
- Suitable Land at Concessional Rates
- Freight Assistance
- Progressive Labour Reforms
- Customised package for Mega Projects
- Stamp Duty Exemption
Ease of Doing Business
Creating conducive environment for business

- Robust Single Window Clearance System. Ranked No. 1 in EoDB amongst UT's
- Implemented 80% Reforms across all departments.
- Aim to achieve 100% compliance in upcoming assessment year

![Graph showing REFORM IMPLEMENTATION (%)]

<table>
<thead>
<tr>
<th>Year</th>
<th>Implementation Percentage</th>
</tr>
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<tbody>
<tr>
<td>BRAP-2015</td>
<td>5.93%</td>
</tr>
<tr>
<td>BRAP-2016</td>
<td>0.30%</td>
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<tr>
<td>BRAP 2017-18</td>
<td>32.40%</td>
</tr>
<tr>
<td>BRAP-2019</td>
<td>79.60%</td>
</tr>
</tbody>
</table>

**Mandated submission of applications in “Online Mode” only.**

**Integrated system for clearances coming up under one roof**

**Transparent Procedures & Checklist**

**Investment Facilitation Cell (JKTPO)**
Prime Minister’s Development Package – An Overview

54 Projects worth Rs. 58,500+ cr. announced under the scheme

- 39 Projects ongoing/ in pipeline
- Semi Ring Road project in Jammu and Srinagar
- Jammu-Akhnoor-Poonch and Chenani-Sudhmahadev roads under construction

- 2 new AIIMS in Samba and Awantipora
- 93 project worth Rs. 593 cr. under AMRUT scheme

- Conservation Plan for Wular and Dal lake
- 200 projects of Power generation, transmission and distribution
Industrial Ecosystem

Identified Land Bank

- 6000+ acres of ready land bank for industries available at competitive price for investors
- Earmarked sector specific land bank across suitable locations in JK, close to Airports, Highways and Rail links

Kashmir
Land (in acres)
1. Ganderbal: 155
2. Srinagar: 91
3. Pulwama: 137
4. Anantnag: 334
5. Kulgam: 115
6. Bandipora: 297
7. Baramulla: 88
8. Budgam: 25
9. Kupwara: 125

Jammu
Land (in acres)
10. Rajouri: 230
11. Udhampur: 928
12. Poonch: 115
13. Samba: 39
14. Jammu: 1495
15. Kathua: 256
16. Kishtwar: 85
17. Reasi: 3556
18. Doda: 40
Industrial Ecosystem
Vibrant and thriving industrial units

Our partners in growth
### Investible Projects

**Opportunities for Investors**

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<td>Film cities</td>
<td>Cold Chain &amp; CA storage facilities</td>
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<td>Film Institutes</td>
<td>Integrated Packaging Houses</td>
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<td>Adventure Tourism/ water sports</td>
<td>Multiplexes</td>
<td>Food Park</td>
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<td>Eco Tourism/ Wildlife Tourism</td>
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<td>Implementation of Agri-Tech Solutions</td>
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Investible Projects
Opportunities for Investors

Animal Husbandry & Fisheries
- Fish and Poultry farms
- Dairy, Egg and Meat Processing
- Wool Processing
- Cold Chain
- Mega Aquaria/Trout Breeding

Sericulture
- Integrated Rearing, Reeling & Weaving Unit
- Cold storage for Cocoon Preservation
- Cocoon Reeling Units
- Filature Units

Herbal and Medicinal Plants
- Mandi of Medicinal Plants on PPP Mode
- Specialized AYUSH Wellness centres
- Cluster mode cultivation of Medicinal and herbal plants
- Processing units
Investible Projects
Opportunities for Investors

Healthcare & AYUSH
- Medi City
- Medical Education Development
- Super Specialty Hospitals
- AYUSH
- Wellness Centre

Pharmaceuticals
- Pharma Park
- R&D Facilities
- Bulk Drug Manufacturing
- Biosimilars/Biologics
- Nutraceutical Manufacturing

Manufacturing & Mining
- Textile Park
- Light Engineering
- High Precision Engineering Equipment
- Willow bat manufacturing
- Mining
### Investible Projects
#### Opportunities for Investors

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Investible Projects
Opportunities for Investors

Handloom & Handicraft

- Craft City
- Craft Parks
- Urban Haats
- Common Facility Centres

Education & Skill Development

- Residential Schools
- Smart Schools
- Education Infrastructure in PPP mode
- Collaboration with Foreign Universities
- Industry Academia partnership
Building Momentum for the Global Investors’ Summit

Roadshow Plan

1. **Bangaluru** (17th Feb, 2020)
   - IT / ITeS, Manufacturing, Food processing, Bio Technology

2. **Kolkata** (17th Feb, 2020)
   - Tourism, Engineering

3. **Mumbai** (21st Feb, 2020)
   - Financial Services, Media and Entertainment

4. **Hyderabad** (2nd March, 2020)
   - IT, Biotech, Pharma

5. **Chennai** (5th March, 2020)
   - Auto & Auto components, Textiles, IT/ITeS

6. **Ahmedabad** (9th March, 2020)
   - Textile, Food Processing, Manufacturing
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Commissioner Secretary, Industries & Commerce
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