



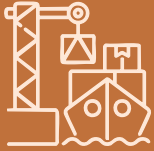
# Infrastructure

Connecting Progress Everywhere



# Sector Overview

## Ports and Shipping



**70%**  
EXIM Trade (Value)

**95%**  
of EXIM Cargo by Volume

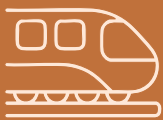
## Warehousing



**\$35 Bn**  
Projected Market Size

**15%**  
CAGR in 2022–2027

## Railways



**4<sup>th</sup>**  
Largest Rail Network  
in the World

**137,000** Km  
Railway Track

## Construction



**\$300 Bn**  
Market Size for  
Construction and  
Real Estate

**28%**  
Contribution to  
National Capital  
Formation

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# Demand Drivers

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## Ports and Shipping

- **Demand Aggregation:** Government support to aggregate demand for shipbuilding driven by ~200+ ships required across ministries, departments, and PSUs. This demand will cover components, raw materials, logistics, and machinery suppliers.
- **Merchandise Export Target of \$1 Tn by 2030:** With ports and shipping being the backbone of EXIM trade, India's merchandise export target of 2030 is dependent on the growth of the sector.

## Construction and Real Estate

- **India's urbanization:** With 40% of the population, nearly 600 million people, projected to be living in cities by 2030, critical construction and real estate infrastructure is being developed.
- **Export Edge:** India's construction equipment market can be leveraged as a manufacturing hub for global giants to export to Asia, Africa, US and Middle East.

## Warehousing

- **Lower land costs and rising consumer aspirations:** Competitive land costs in peripheral and Tier-II/III markets support large, scalable warehouses, while rising incomes and consumption expectations are driving demand for faster, organised supply chains.
- **Demand from 3PL, FMCG/FMCD, and retail:** Growth in organised retail, e-commerce and omnichannel models is pushing 3PLs and consumer companies to expand pan-India, driving sustained demand for Grade-A warehousing.

## Railways

- **Large government-led project pipeline:** Dedicated Freight Corridors (DFC), High-Speed Rail (HSR), and expanding Metro networks are driving sustained demand for rail infrastructure, rolling stock & allied construction.
- **Modernisation & net-zero transition:** Network and rolling stock upgrades, electrification, energy-efficient systems and low-carbon technologies are accelerating investment aligned with India's net-zero goals.



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# Central Schemes

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## ○ National Infrastructure Pipeline (NIP)

- \$1.2 Tn investment pipeline (FY20–FY25) across transport, energy, urban, and social infrastructure.
- 7,000+ projects identified to drive long-term, multi-sector infrastructure build-out.

## ○ National Monetisation Pipeline (NMP)

- \$65 Bn investment pipeline target over FY22–FY25 to unlock capital for fresh infrastructure spending.
- Covers roads, railways, ports, power, and airports, improving asset efficiency and private participation.

## ○ National Logistics Policy (NLP)

- Targets reduction of logistics costs from ~13–14% to 8–10% of GDP.
- Aims to place India among the top 25 countries in the Logistics Performance Index, boosting trade competitiveness.



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# Central Schemes

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## Ports and Shipping

- **Shipbuilding Financial Assistance Scheme**

\$2.4 Bn; 15%/20%/25% financial assistance on contract value/fair price of eligible vessels depending on type, size and ownership of vessel.

- **National Shipbuilding Mission**

To be setup under Inter-Ministerial Governing Board, supported by The Directorate General of Shipping and SFCL.

- **Maritime Development Fund**

\$2.9 Bn low-cost, long-term financing, for enhancing Indian Tonnage, Shipbuilding, Port Infra and Inland Waterways.

## Railways

- **Amrit Bharat Station Scheme**

One of India's largest rail modernisation programs, transforming 1,300+ stations into transit-oriented city hubs with modern passenger amenities and iconic infrastructure.

- **Proven execution models**

100+ stations redeveloped through EPC and PPP formats, including Gandhinagar Capital Railway Station, Gandhinagar; Rani Kamalapati Railway Station, Bhopal; and Sir M. Visvesvaraya Terminal, Bengaluru.



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## Why Invest In India

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### ○ Ports and Shipping

**Strategic Location and Resources:** Proximity to global shipping routes, combined with well priced resources, a young, skilled population.

**Specialized Maritime Clusters:** The government is building specialized maritime clusters which would bring together the entire maritime ecosystem, including ports, shipyards, ship repair yards and ancillary manufacturers, to reduce cost and increase time efficiency.

## Construction Equipment and Real Estate

**Sustained domestic demand with export upside:** India offers a strong, predictable construction pipeline driven by urban infrastructure, transport, and industrial expansion, while also serving as an efficient export base to the USA, Africa, Middle East, and Southeast Asia.

**Global manufacturing & supply chain hub:** Competitive costs, improving industrial ecosystems, and policy support position India as a strategic hub for construction equipment manufacturing and supply chain leadership with global reach.

## Railways

**Policy-backed localisation (NRP + MII):** Public Procurement (Preference to Make in India) Order, 2017 mandates preference for Class I suppliers (>50% local value addition), creating assured demand for domestically manufactured rail products.

**Targeted capacity expansion under NRP 2030:** Large investment pipeline across rolling stock, track & terminal infrastructure, and signalling & communication, driving long-term opportunities for manufacturers and EPC players.

## Warehouse

**Exponential Market Growth and Grade A Prominence:** India's warehousing market is expected to reach \$35 Bn by 2027 at a 15% CAGR. Demand for high-quality Grade A facilities is gaining prominence, with 6 Mn Sq. Ft. of additions expected in the next four years.

**Next-Gen Infrastructure and Connectivity:** Strategic development is underway for 35 Multi-Modal Logistics Parks (MMLPs) and 200 Gati Shakti Cargo Terminals (GCTs) by 2030. This is complemented by successful asset monetization drives, such as those by the Central Warehousing Corporation (CWC).

# Investment Opportunity

## Ports & Shipping

- **Vadhavan Port** (Maharashtra), \$8.7 Bn investment. Poised to emerge among the world's top 10 ports and biggest in India.
- **Galathea Bay** (A&N Islands), \$5 Bn investment, to become an international container transshipment port.

## Warehousing

- **35 Assets for Monetization:** NHLML is rolling out 35 Multi-Modal Logistics Parks across India, with projects already awarded, under bidding, and in feasibility, creating a strong long-term pipeline for private investment and logistics infrastructure development.
- **Rise in warehousing demand** in Tier II locations such as Assam in North-east, Indore in MP and Visakhapatnam in AP.

# Investment Opportunity

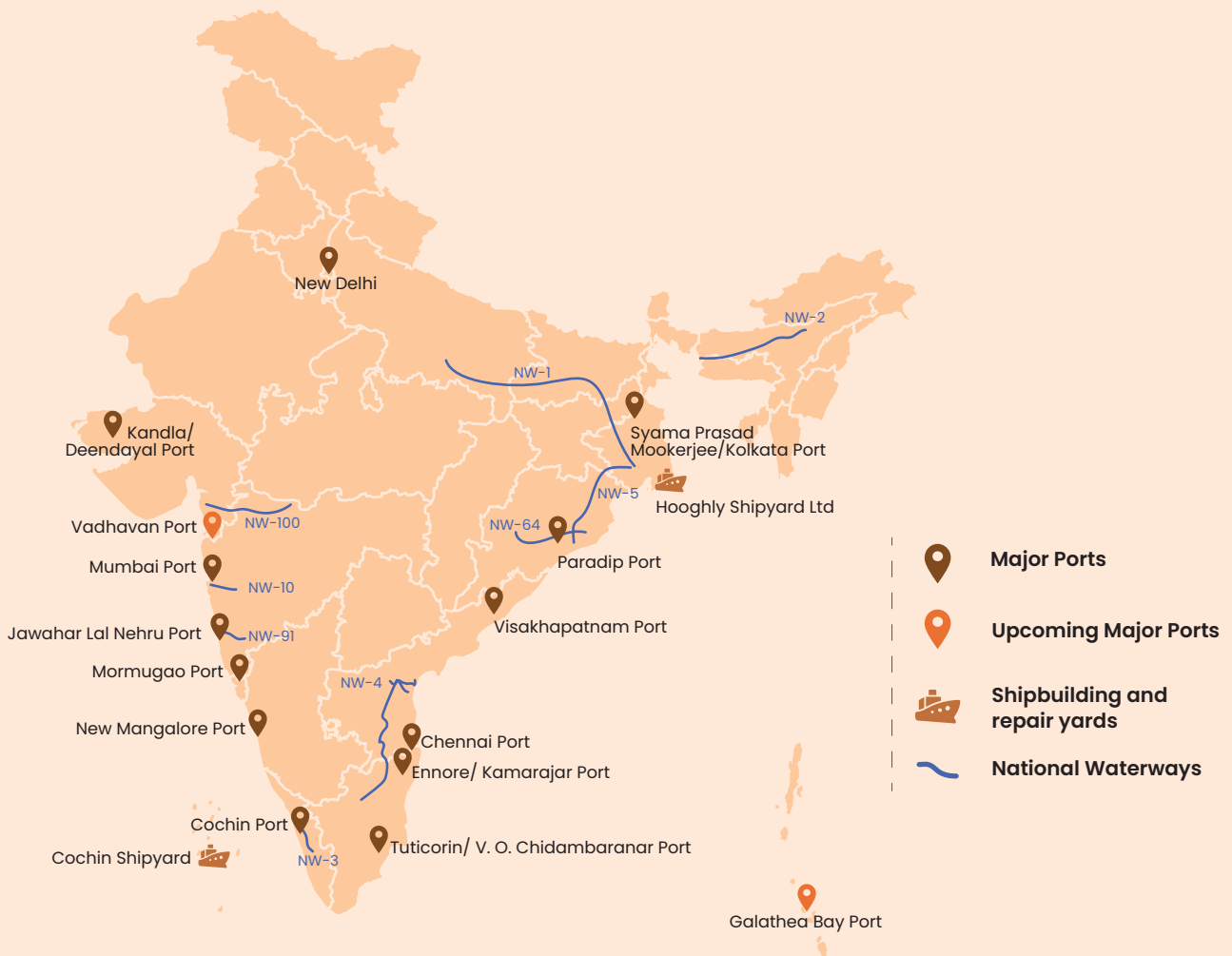
## Railways

- **Rolling stock components & equipment manufacturing:** Investment opportunities in high-value systems, localisation, and upgrades driven by metro, HSR, and fleet expansion.
- **Track infrastructure, signalling & communication manufacturing:** Strong demand for advanced tracks, digital signalling, and safety systems under rail modernisation programs.

## Construction

- **Construction Equipments:** Supported by the \$1.5 Tn National Infrastructure Pipeline (NIP) by 2030, which creates a massive multiplier impact on equipment demand.
- **Construction Materials:** High demand for Sustainable Materials (Green Steel, Low-Carbon Cement) driven by India's Net Zero 2070 commitments mandate the use of eco-friendly materials in government housing (PMAY).

# Ports & Shipping Clusters



**14**

Major Ports

**26**

Operational National Waterways

**300k**

Seafarers

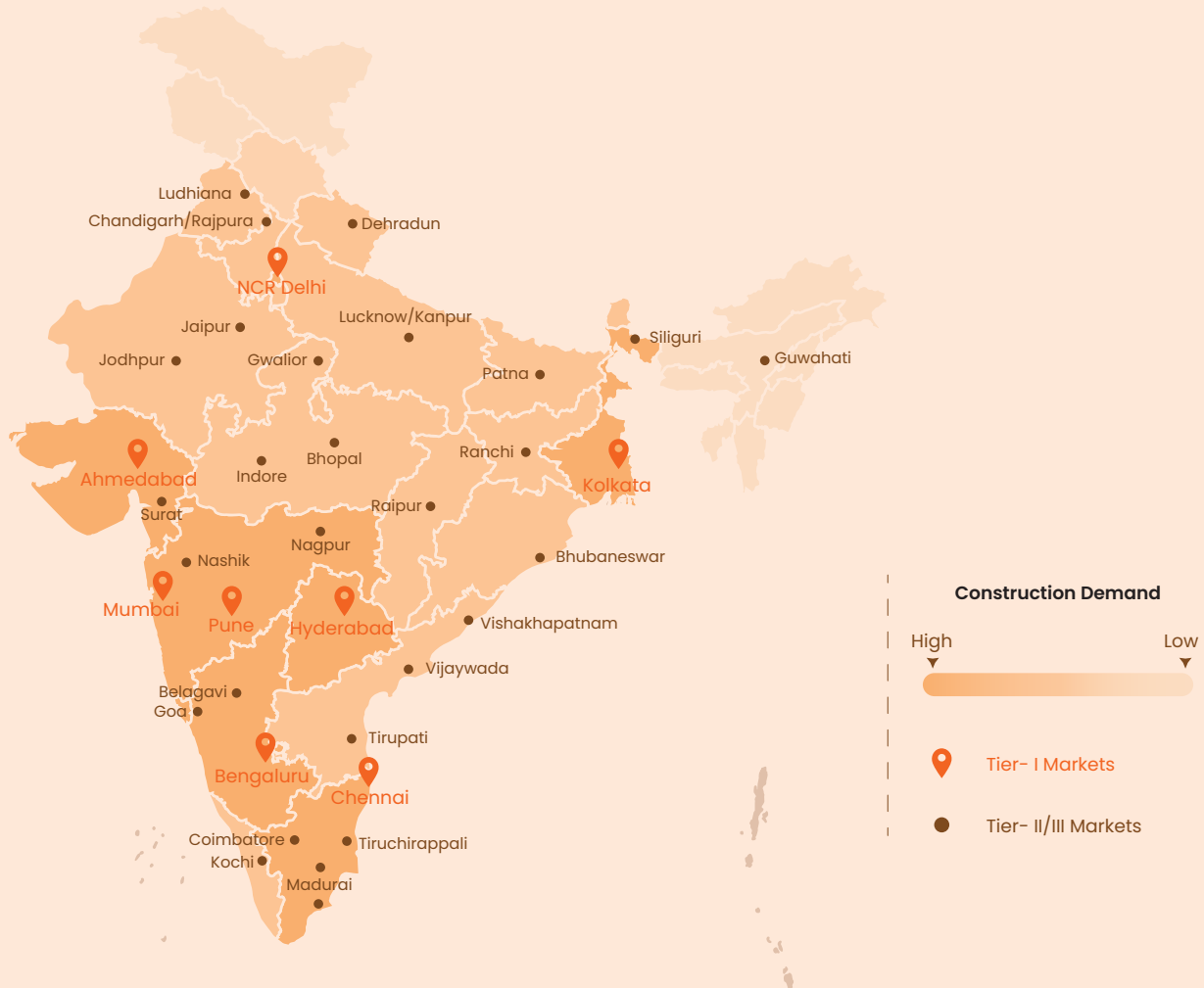
**200+**

Non-Major Ports

**40+**

Shipyards

# Construction & Warehousing Clusters



## Tier-I Markets-Growth Rate (%)

## Upcoming Tier-II/III Markets

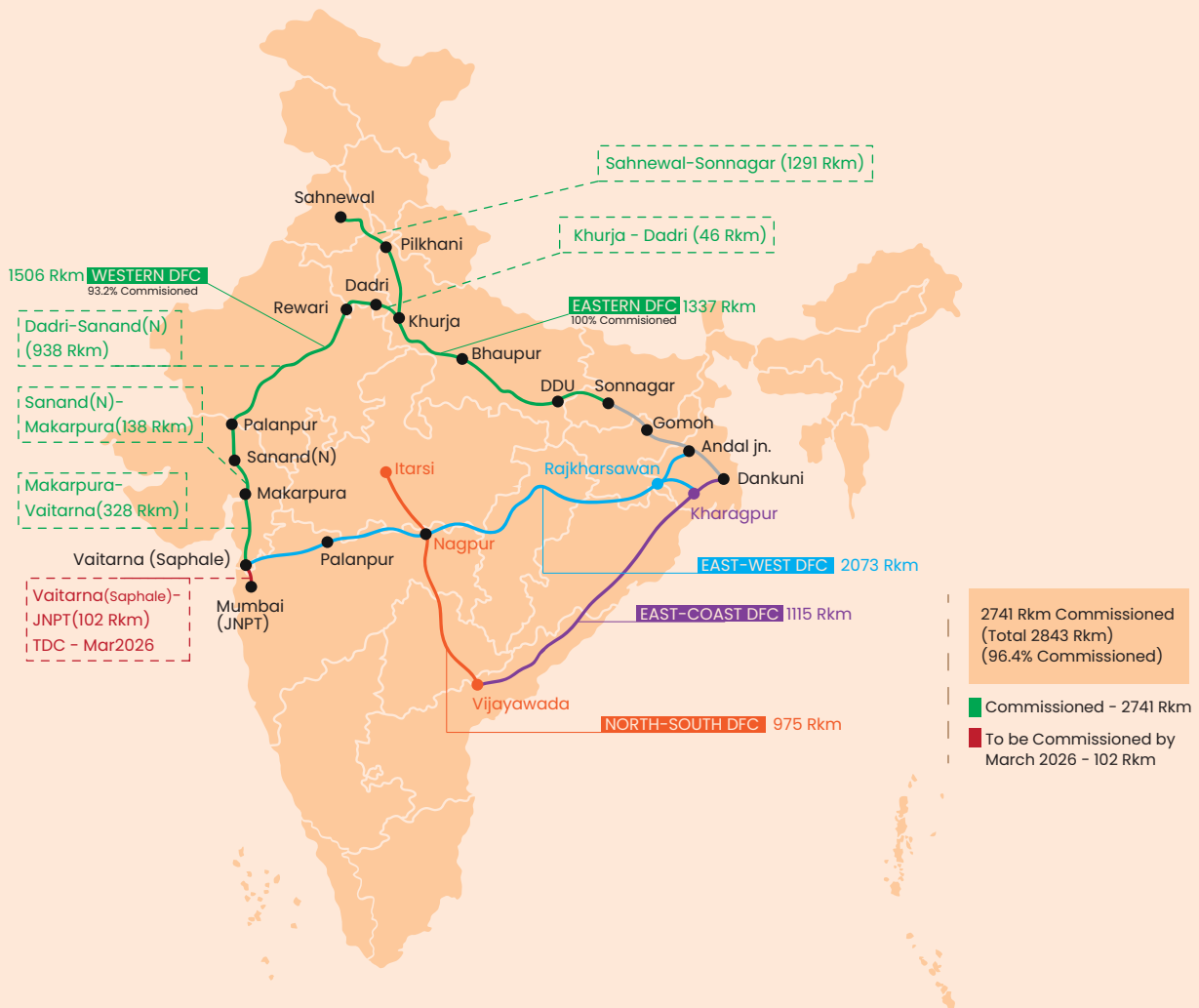
### State Growth Rate for 24-25

### Urban Agg. Centers

11.9%	Chennai (TN)
8.94%	Ahmedabad (GJ)
8.08%	Hyderabad (TG)
7.37%	Bengaluru (KA)
7.27%	Mumbai (MH)
7.27%	Pune (MH)
6.80%	Kolkata (WB)
6.21%	Delhi-NCR (DL)

Vishakhapatnam	Kochi	Varanasi
Chandigarh	Bhopal	Thiruvananthapuram
Amritsar	Coimbatore	Bhubaneswar
Patna	Indore	Lucknow

# Railways Clusters



2741 Rkm Commissioned  
(Total 2843 Rkm)  
(96.4% Commissioned)

Commissioned - 2741 Rkm

To be Commissioned by  
March 2026 - 102 Rkm

## Status of DFC Project (EDFC and WDFC)

Corridor	Commissioned	Work in Progress	Total
EDFC	1337 km (100%)	-	1337 km
WDFC	1404 km (93.2%)	102 km	1506 km
<b>TOTAL</b>	<b>2741 km (96.4%)</b>	<b>102 km</b>	<b>2843 km</b>

## Proposed New Corridors

Corridor	From	To	Length
East-Coast Corridor	Kharagpur	Vijayawada	1115 Rkm
East-West Sub-Corridor-I	Palghar	Dankuni	2073 Rkm
East-West Sub-Corridor-II	Rajkharsawan	Andal	195 Rkm
North-South Sub-Corridor	Vijayawada	Itarsi	975 Rkm

# Success Story -



## Business

- Advanced Tunnel Boring
- Machines for mega infrastructure projects



## Revenue

\$1.3 Bn (FY24)



## HQ

Germany



## Significance

- First large-diameter TBMs made in India for high-speed rail and mega metro tunnels.
- Greater localisation of high-precision TBMs, reducing imports.

## Role of Invest India



Invest India engaged with Herrenknecht to present India as an expansion destination and offered end-to-end investment facilitation support.



Herrenknecht India CEO met Invest India to discuss investment plans, state options, incentives and regulatory pathways in India.



Based on Invest India's guidance, Herrenknecht shortlisted Tamil Nadu; coordinated with the state government to present suitable land parcels.



Invest India facilitated site visits to shortlisted parcels, enabling Herrenknecht's internal technical and commercial evaluation.



Post-evaluation, Invest India enabled the shift to private land and facilitated high-level DPIIT and HCIM engagements during German Leadership Summit.



After due diligence, with continuous Invest India coordination, Herrenknecht finalised Gummidipoondi as the project site in Tamil Nadu.

**Manufacturing Facility in Chennai**  
**\$34 Mn Investment**

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# About Invest India

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Invest India is the National Investment Promotion and Facilitation Agency of the Government of India, set up in 2009 as a not-for-profit company under the Department for Promotion of Industry and Internal Trade (DPIIT), Ministry of Commerce and Industry.


Supported by a unique partnership between the central and state governments and industry associations, Invest India serves as the first point of contact for global and domestic investors. It provides comprehensive, end-to-end support across all stages of the investment lifecycle—ranging from pre-investment advisory and facilitation to aftercare and expansion support—with a strong emphasis on enabling manufacturing through the Make in India initiative.


Invest India plays a vital role in connecting investors, industry, and government to ensure the successful execution of investment projects. The agency focuses on promoting investments in high-impact sectors such as Electronics & Semiconductors, Renewable Energy, Electric Vehicles, Capital Goods, Textiles, Food & Agriculture, Pharmaceuticals, Chemicals & Critical Minerals, and Infrastructure. With a commitment to innovation, sustainability, and job creation, Invest India continues to drive India's transformation into a leading global investment destination.

# Invest India Services




For more details:

 [investindia.gov.in](http://investindia.gov.in)

 +91 11 23072328

 [contact@investindia.org.in](mailto:contact@investindia.org.in)

 Jodhpur Officer Hostel, C-Hexagon, Pandara Park,  
India Gate, New Delhi-110003

To know more,  
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