



INVEST INDIA

India Opportunity
November 2024



India : Fastest Growing Large Economy



GDP: Growth Rate of 8.2% FY 23-24

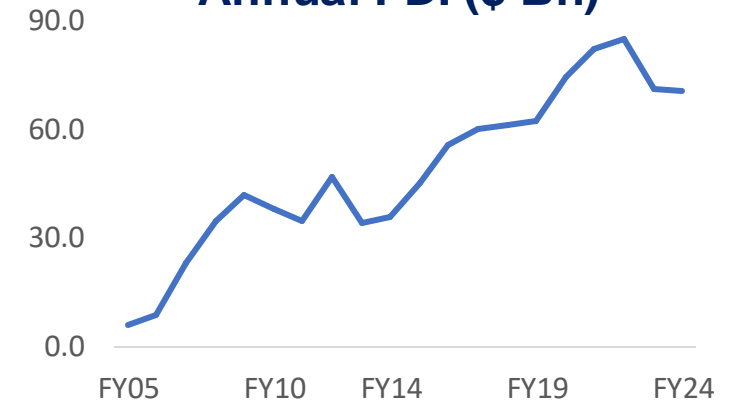


Gross FDI: FDI inflow 2014-23: USD 596 billion has increased by 100% over the previous 9 financial years (2005-14: USD 298 billion) and is nearly 67% of the total FDI reported in the last 23 years (USD 971 billion)

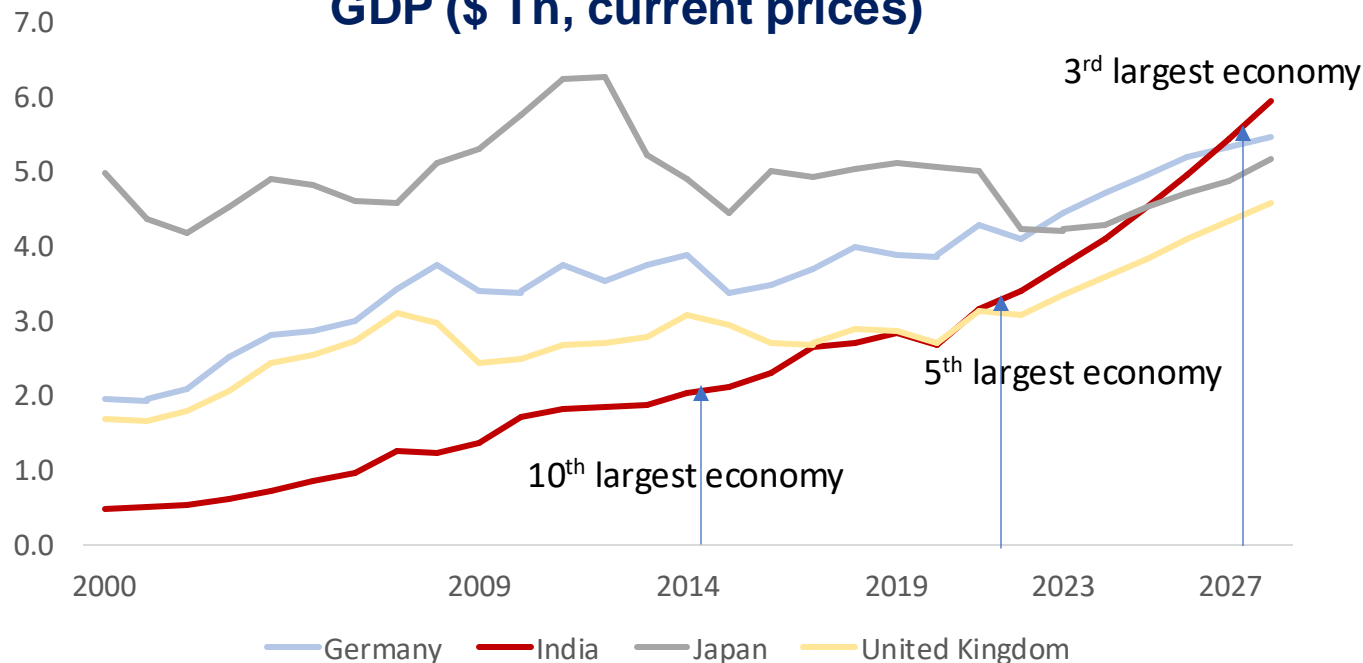


Exports: \$776 B (FY23): 2x since FY14; \$ 2Tn by 2030

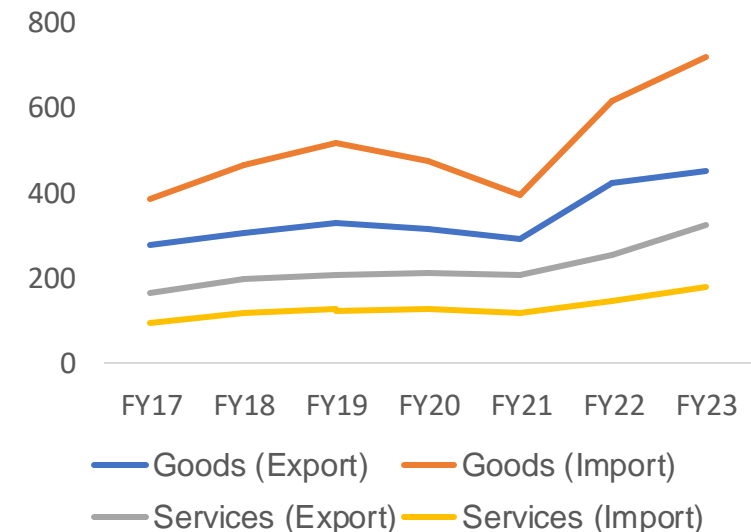
Annual FDI (\$ Bn)



GDP (\$ Tn, current prices)



Trade (\$ Bn)



India: Macro Overview



Purchasing Manager's Index: In expansionary zone (>50) for the last 31 months (up to May'24)



Worker Population Ratio: Improved from 34.7% (FY18) to 46.9% (Mar 24)



E-Way Bills: Reached an average of 33.55 lakh per day in Feb 24



Virtuous housing cycle: 12-year low unsold inventory



Capex Upcycle: 3x rise in capex over last 5 years

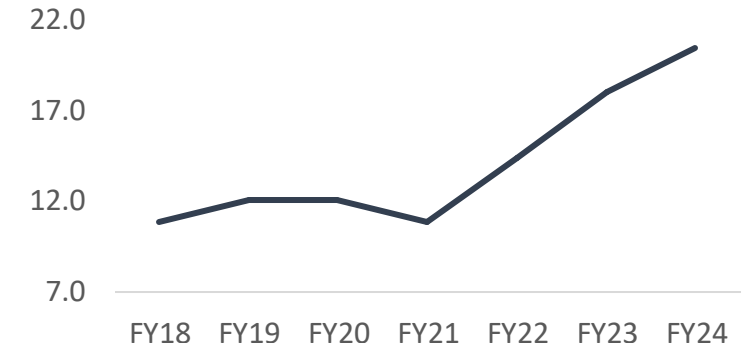


GFCF: 270 bps increase in 4 years to ~30%

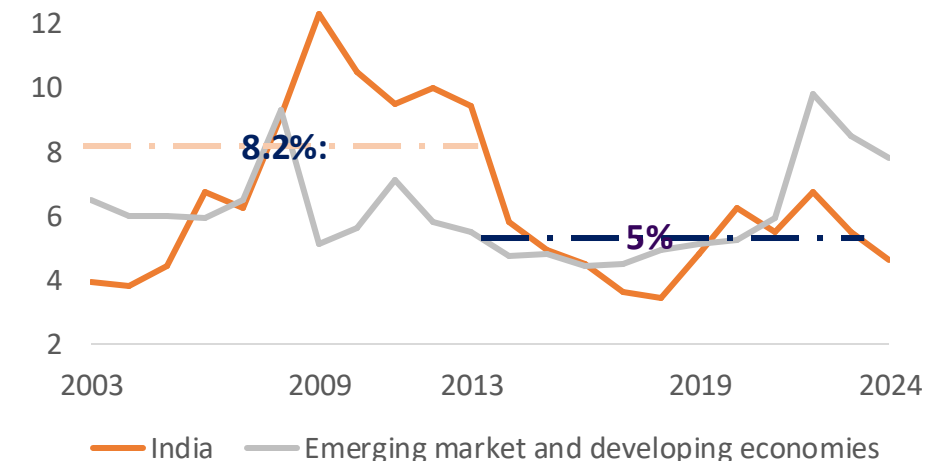


Index of Eight Core Industries: ICI recorded a 7.5% cumulative growth in FY23-24 (compared to 1.5% avg. during FY20 – FY22)

Avg. Monthly GST Collection (\$ Bn)



Consumer Price Inflation





Economy
32-35 Trillion



Growth of **7.6%** over the next 25 years



Per Capita Income to grow **9x** to **~USD 22,000**



Industrial Sector rise from 26% to 35% of the GDP



Largest & Youngest working population (top economies)



World-Class **Infrastructure** Facilities

Production Linked Incentives

Production Linked Incentives Schemes

14
sectors

\$ 26 Bn
incentive

- Create global champions, increase production, employment, exports
- Transform India's export basket to high value-added products

Key Achievements

- 746 applications approved in 14 Sectors
- Cumulative investment of Rs. 1.18 trillion realized resulting in incremental production/sales of Rs 9.7 trillion & employment of 800,000. Out of this, exports of 4 lakh crores have been achieved
- More 1300 manufacturing unit set up across 14 key sectors
- Among beneficiaries, 176 MSMEs are involved in sectors such as Bulk Drugs, Medical Devices, Pharma, Telecom, White Goods, Food Processing, Textiles, and Drones

Sectoral Progress under PLI



Electronics

- Production of cell phones have increased by more than 50%
- Export of cell phones have increased ~4 times since FY 2020-21
- FDI increased by 254% in PLI for LSEM



Telecom

- **60% Import substitution**
- Self-Reliance in **Antennae, GPON & CPE**
- 370% increase in sale (Telecom & Networking; FY24 over FY20)



Pharmaceuticals

- **Unique intermediate materials and bulk drugs are being manufactured** in India including Penicillin-G
- **Production of 39 Medical Devices** have commenced such as CT-Scan, Heart Valves, Stents, etc



Drones









- **7x jump in turnover** (all MSMEs & Startups)

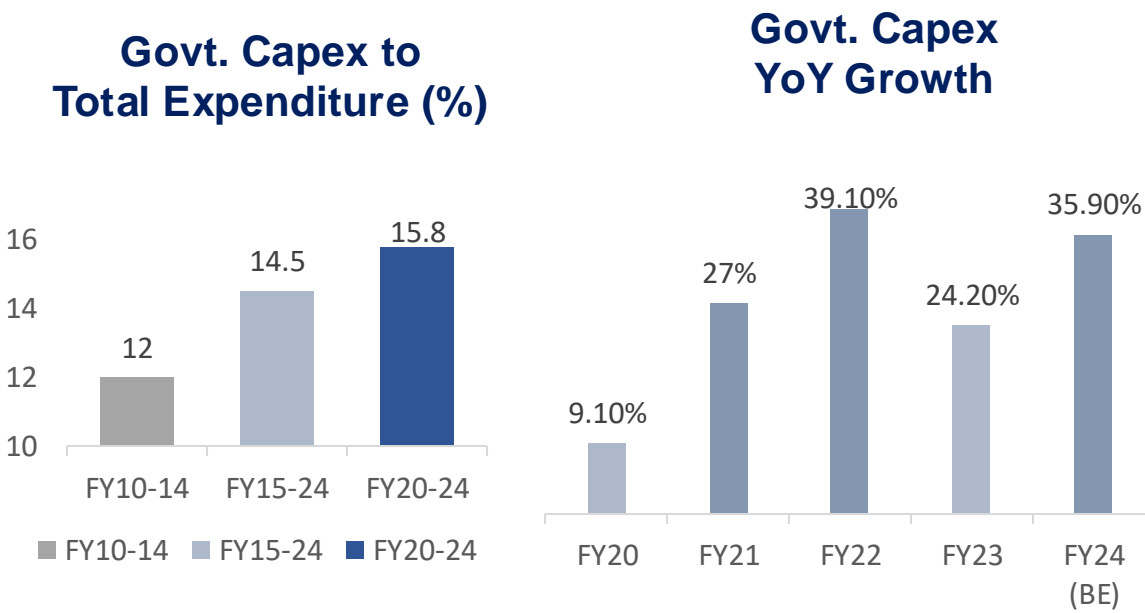


White Goods

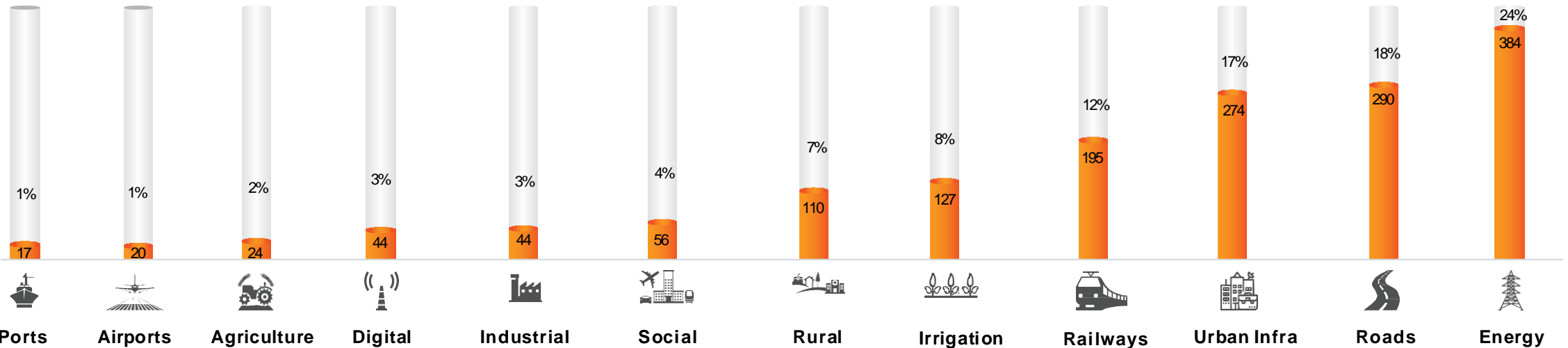
- Domestic manufacturing of components for air conditioners such as compressors and copper tubes

Infrastructure: Steady Investment & Rapidly Growing Ecosystem

		2014	2023
	Cities with Metro Rail	5	20
	Pace of highway construction	12 km/day	28 km/day
	Electrified Rail Network	21,800 km	60,800 km
	Number of Airports	74	149
	Toll-Plaza Waiting Time	12.2 mins	0.8 mins
	Total Installed Power Capacity	249 GW	429 GW
	Installed Renewable Capacity	76 GW	181 GW
	Electrification Status	85.1%	100.0%



National Infrastructure Pipeline: \$1.5 Tn investment outlay (2020-25); 21% share of private investments



Structural Reforms

- ❑ **GST:** Replacing 25+ indirect taxes; Monthly collection at \$20 B+ (2x since implementation in 2017)
- ❑ **Corporate Tax:** Reduced to 22% ; 15% for new manufacturing units (2019)
- ❑ **Labour Reforms:** 29 central labour laws rationalized into 4 codes (2020)
- ❑ **FDI liberalization:** Broadcasting, Pharmaceuticals, Single Brand Retail Trading, Construction & Development, Coal Mining, Contract Manufacturing, Civil Aviation, Defence, Insurance, Pension, Telecom, etc.
- ❑ **Institutional Investors:**
 - ❑ FPIs allowed to Debt Finance REITs, InvITs (2021)
 - ❑ Tax efficient Infra Debt Funds: Enabled IDFs to issue zero coupon bonds benefiting FPI investments in infra (2021)
 - ❑ 100% tax exemption for sovereign & pension funds for investments in infrastructure extended till Mar'25
- ❑ **Dividend Distribution Tax:** abolished (2020)
- ❑ **Development Finance Institution**
 - ❑ Setting up of NaBFID: Govt. infusion of ~INR 20,000 cr for long-term infra projects
- ❑ **Custom Bonded Warehouses**
 - ❑ Duty exempted on domestically manufactured goods for exports
- ❑ **Remissions of Duties and Taxes on Exported Products**
 - ❑ Reimbursement of taxes & duties incurred on exports of goods from India

Structural Reforms

❑ **National Single Window System**

- ❑ One-stop digital platform for all investor approvals, Centre & State; 255k+ approvals facilitated
- ❑ Offers GIS-enabled repository of industrial-grade land available for investors

❑ **PM Gati Shakti:** GIS-Based Technology Platform to Enhance Multimodal Connectivity, Logistics Efficiency, and Ensure Seamless Movement of Goods and Services

❑ **Unified Logistics Interface Platform:** Integrated with 37 systems (10 ministries covering 1800+ fields)

❑ **National Logistics Policy 2030 Target:** Reducing Logistics Costs Relative to GDP and Elevating India into the Top 25 Nations on the Logistics Performance Index (LPI)

❑ **Compliances:** 3,600 legal provisions decriminalized; 41,000 compliances reduced

❑ **Jan Vishwas Bill (2023):** 183 provisions to be decriminalized in 42 Central Acts

❑ **Open Network for Digital Commerce (ONDC):** Open Network for Digital Commerce, is a private non-profit Section 8 company established by the Department for Promotion of Industry and Internal Trade of Government of India to develop open e-commerce

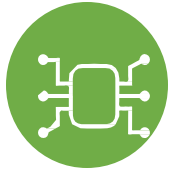
❑ **Enhanced Port Infrastructure** Streamlining Export and Import with Reduced Time and Costs, featuring Online Documentation, Electronic Container Sealing, and Automated Clearance of Imported Goods

❑ **Semicon India Mission:** Financial incentives worth USD 10 Bn to develop semiconductors and display manufacturing ecosystem

❑ **Project Development Cells:** 29 Specialized teams in ministries to handhold investors and offer ready on-the-shelf investible projects

India's Tech Frontier

Unleashing Innovation, Shaping Global Tech Trends



500 Mn+ people brought into the Formal Banking System (PMJDY)



USD 1 Trillion+ digital economy by 2030



INR 4L Cr+ in gross merchandise value (govt.E-marketplace)



700+ Districts covered by 5G services



685,501 km of Optical Fiber Cable (OFC) has been laid under the BharatNet project



900 Mn+ broadband connections

India's Tech Frontier

Unleashing Innovation, Shaping Global Tech Trends

Sector at a Glance



57% Share in Global Sourcing Market

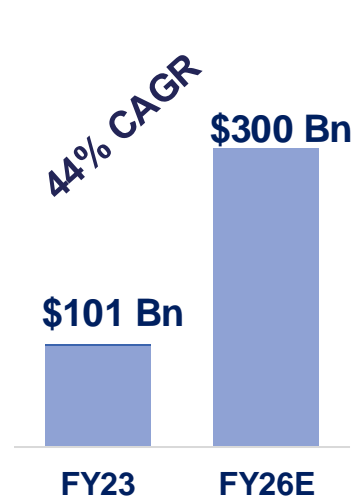


#2 Largest Smartphone Market

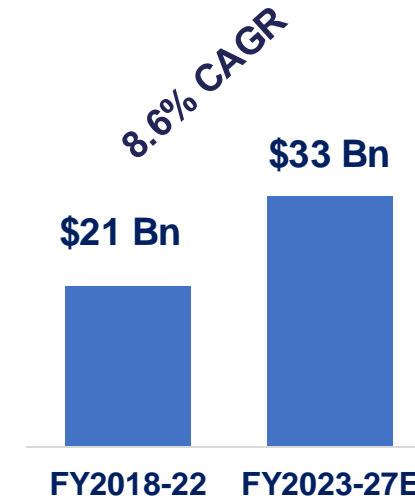


2x Increase in Electronics export
between FY21-FY23

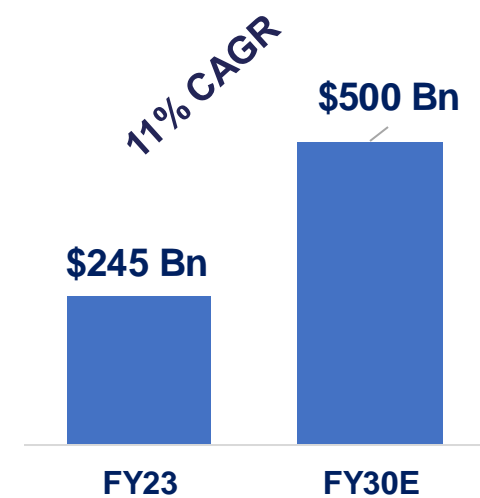
Electronics
Production



Expenditure by Telecom
Service Providers



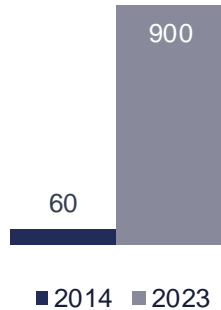
ITBPM Market Size



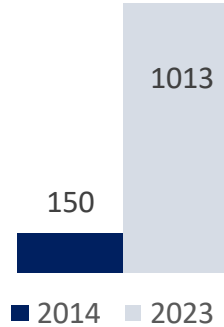
Digital Economy

#2 – Smartphone Users, Internet Users, App Downloads

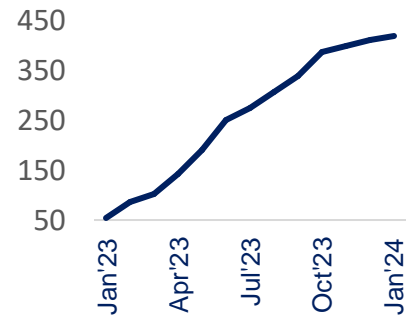
Mobile Broadband Subscribers (Mn)



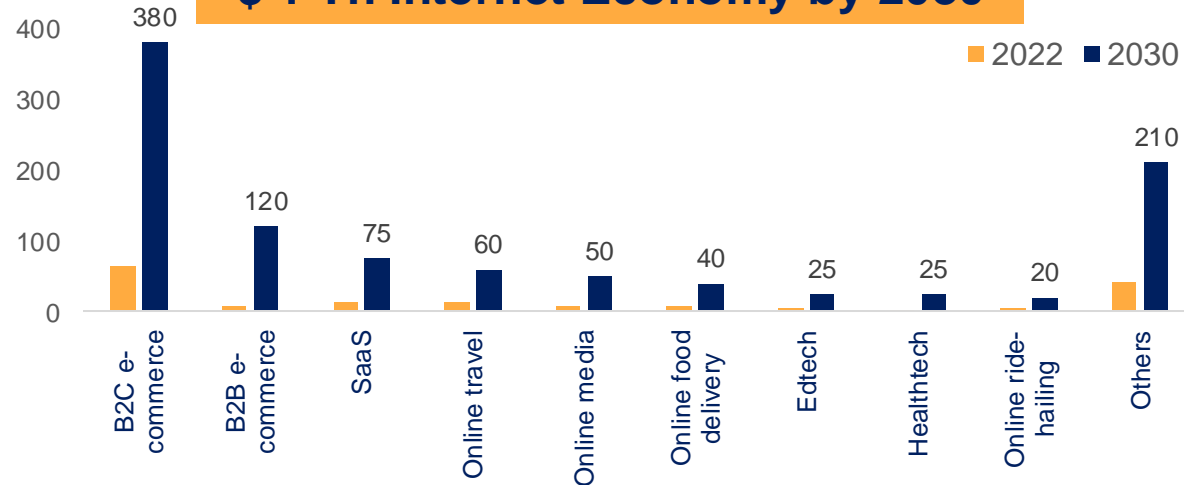
Smartphone Users (Mn)



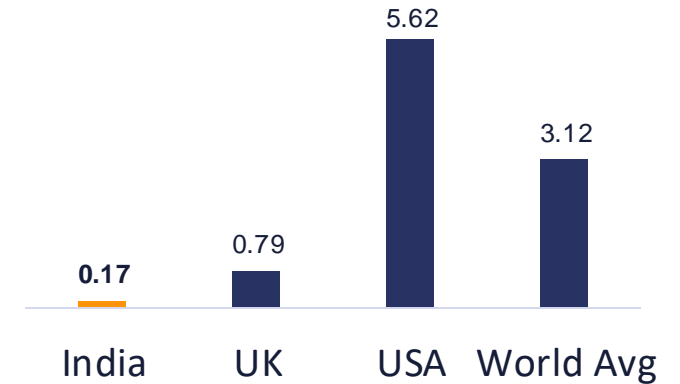
5G Base Transceiver Stations ('000)



\$ 1 Tn Internet Economy by 2030

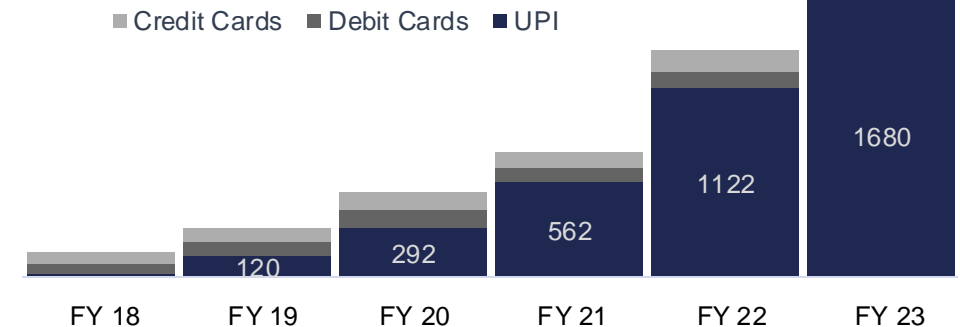


Amongst Lowest Data Costs Globally (\$/GB)



Global leader in Retail Digital Payments

Retail Digital Transactions by value (\$ Bn)



India's Biofuel Landscape

National Biofuels Policy, 2018

- ❑ Envisage to increase biofuels consumption.
- ❑ Allowed production of ethanol from diverse feedstock: C & B-Heavy Molasses, Sugarcane juice, Agricultural residue, etc.
- ❑ Encompasses 'bio-CNG' as a biofuel that can be used as transportation fuel.

Ethanol Blended Petrol

- ❑ Increased the ethanol blending percentage in petrol to **12% in 2023 viz-a-viz 1.53% in 2014**
- ❑ **Pradhan Mantri JI-VAN Yojana: viability gap funding for setting up 2nd generation ethanol plant.** The scheme prescribes financial assistance up to USD 18.07 Mn per plant.
- ❑ Oil demand is expected to increase by **80%** to reach **9 mb/day by 2050** from 6 mb/day in 2024.

Compressed Biogas (CBG)

- ❑ **Under Sustainable Alternative Towards Affordable Transportation (SATAT)**, 2210 Active LOIs being pursued - 52 plants commissioned.
 - **Waste to Energy Program:** Central Financial Assistance for CBG plants (Maximum of Rs. 10 crores (USD 1.20 Mn) per plant
- ❑ Target to raise the share of natural gas in the energy mix to **15% by 2030** from about ~6 % now.

Future Projects Vision

- ❖ **By 2025, at 20% blending level, ethanol demand will increase to ~10 Bn liters from ~5 Bn liters in FY23**
- ❖ **CBG Blending Obligation (CBO) will be voluntary till FY25 and mandatory from FY26 increasing from 1% to 5% of total CNG/PNG consumption by FY29**
- ❖ Sustainable Aviation Fuel announced indicative blending target (for international flights) of 1% in 2027 and 2% in 2028

Sustainable Energy - India's Pioneering Journey

India is implementing one of the world's largest RE expansion plan



1,000+ GW of total RE potential in India



180+ GW of installed RE Capacity; 4th largest globally



4x increase in installed RE capacity in last 10 years



3rd largest market in the world for new solar PV capacity



4th in RE Installed Capacity Globally



40% non-fossil generation achieved in 9 years ahead of schedule

Growth Projections by 2030

- ❖ **500 GW** non-fossil installed capacity
- ❖ **1 Bn Tonne** carbon intensity reduction
- ❖ **50%** renewable energy supply
- ❖ **537 GW** transmission capacity
- ❖ **100 GW** electrolyzer capacity
- ❖ **5 MMT** green hydrogen production
- ❖ **18.8 GW** pumped storage
- ❖ **41 GW** battery storage

Priority Focus Areas



RE Generation Projects

Net-Zero target by 2070
underscores India's initiatives
around large-scale deployment of
low-carbon sources of energy



Energy Storage

India will require
monumental storage capacities to support large
scale RE integration



Electricity Transmission

A **robust transmission system** is needed to connect
new RE capacities; roadmap
till 2030 already laid down



Green Hydrogen

India aims to leverage its
huge RE potential to become
a **global leader in green hydrogen** production

R&D in India

OVERVIEW

- ❑ **Global Innovation Index: Rank** jumped from 81 in 2015 to 40 in 2023
- ❑ **R&D spend** is 7th highest globally
- ❑ **R&D expenditure** doubled from **\$8.03 BN** in FY11 to **\$16.98 BN** in FY21
- ❑ **R&D investment per capita** rose from **PPP\$ 29.2** in FY08 to **PPP\$ 42.0** in FY21
- ❑ **Gross Expenditure on R&D (GERD)** rose to **\$57.9 BN PPP** in FY21 from **\$50.3 BN PPP** in FY15
- ❑ **Contribution to global GERD: 3.1%**

GOVERNMENT INITIATIVES

- ❑ **Anusandhan National Research Foundation (ANRF):** Boosting science & tech research ~\$ 6 BN budget (2023-28)
- ❑ **National Quantum Mission (NQM):** ~\$ 700 MN to pioneer in Quantum Technology
- ❑ **National Mission on Interdisciplinary Cyber-Physical Systems (NM-ICPS): 25 Innovation Hubs** for cutting-edge research in AI, robotics, and cyber security
- ❑ **National Initiative for Developing and Harnessing Innovations (NIDHI)** program propels a thriving startup ecosystem, catalyzing tech innovations
- ❑ **National Geospatial Policy 2022:** Targeting global leadership in geospatial data through local innovation
- ❑ **National Super Computing Mission (NSM):** Deploying **28 supercomputing systems** nationwide to power advanced research

R&D Investment : Leading Private Sectors



R&D in India – Patents and Innovation



FY23, India granted approximately **103,000 patents**. On average, **250 patents** were granted every working day during this period



Patent filings increased to over **90K in 2023** from 50K in 2018
India has now surpassed Canada, Australia, France, Germany in patent filing.



6th in the world for Patent Filing



Publishers (8.4 lakh patents in India till Dec'23): **India** (32%), **USA** (27%), **Japan** (11%), **Germany** (8%)

Top Fields of Innovation

- ❑ **2014-23 Patents:** Mechanical (20%), Chemistry (16%), Computer (11%), Electronics (10%), Communication (9%), Electrical (7%), Biomedical (6%), Biotechnology (5%)
- ❑ **Emerging Segments:** Computers, Communication, Biomedicals and Polymer
- ❑ **Share of single inventor registrations** in India: 35.5% Indians (in 2014-23) compared to 22.9% (2004-13)
- ❑ **Share of multiple inventors:** Resident Indians share in IPR increased to 37.6% (in 2014-23) compared to just 16.3% (in 2004-13)

India **ranks #1** in the Global Innovation Index in the Central & Southern Asia region

Companies with largest R&D centers in India



Largest R&D centre outside South Korea



Largest design & engineering centre outside the US



Second largest R&D workforce in India



Second largest R&D centre globally



Largest design centre outside US



Largest global R&D centre outside Korea



Largest R&D centre outside Germany

180 innovation centres in India belong to Fortune 500 companies

Prioritizing Inclusivity

Harnessing Diversity to Drive Sustainable Development and Prosperity



510 Mn bank accounts opened to ensure financial inclusion



25 crore people in India came out of multidimensional poverty in 9 years



24.1 Mn pucca house constructed under “Housing for All” in rural areas



Direct Benefit Transfer **USD 3.4 Mn** using PM-Jan Dhan accounts



6,19,357 toilets constructed



Free gas connections to **103 Mn families**

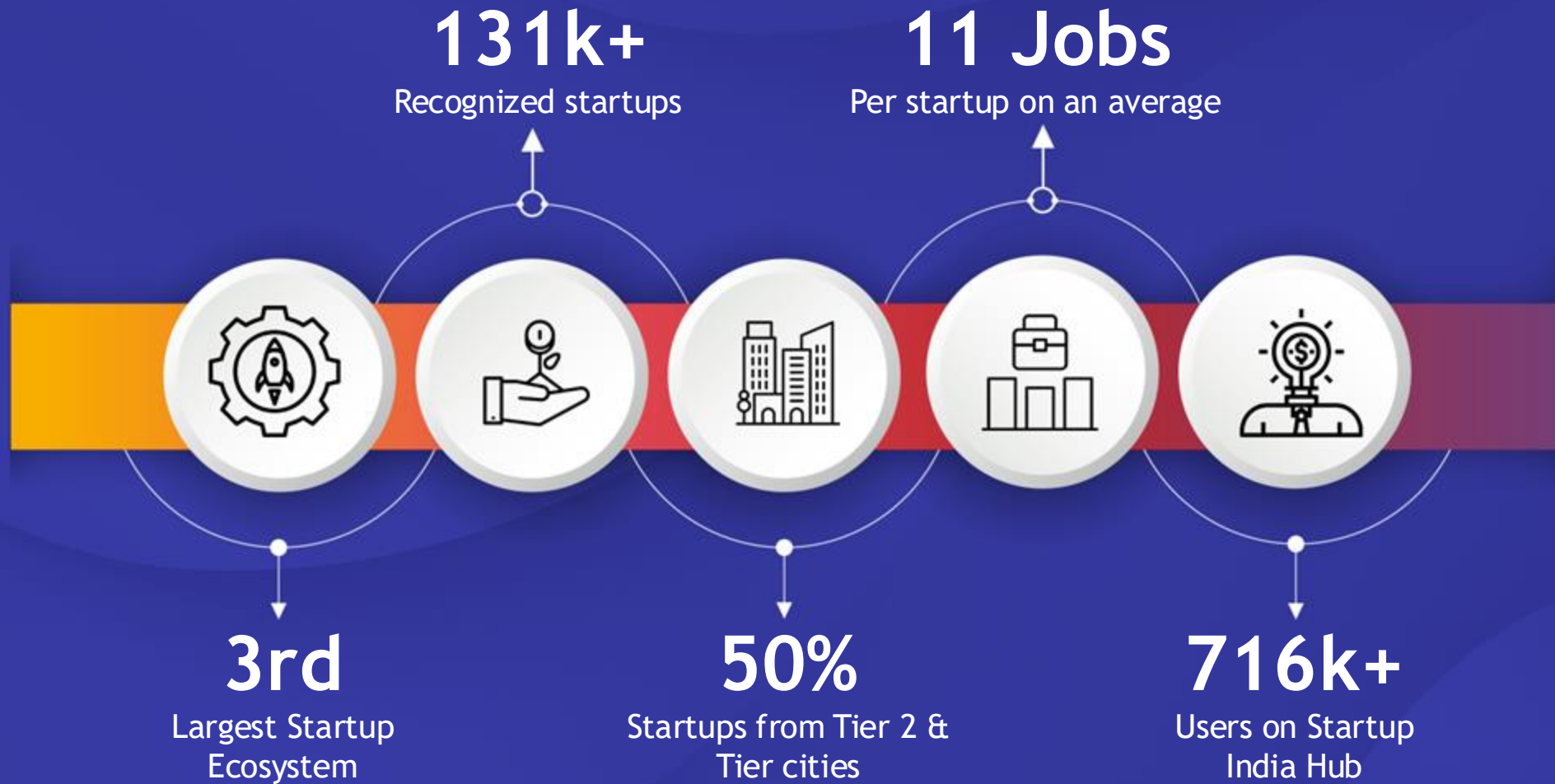


Free health care coverage of **Rs 5 lakh** is given to more than **10.74 crore families**

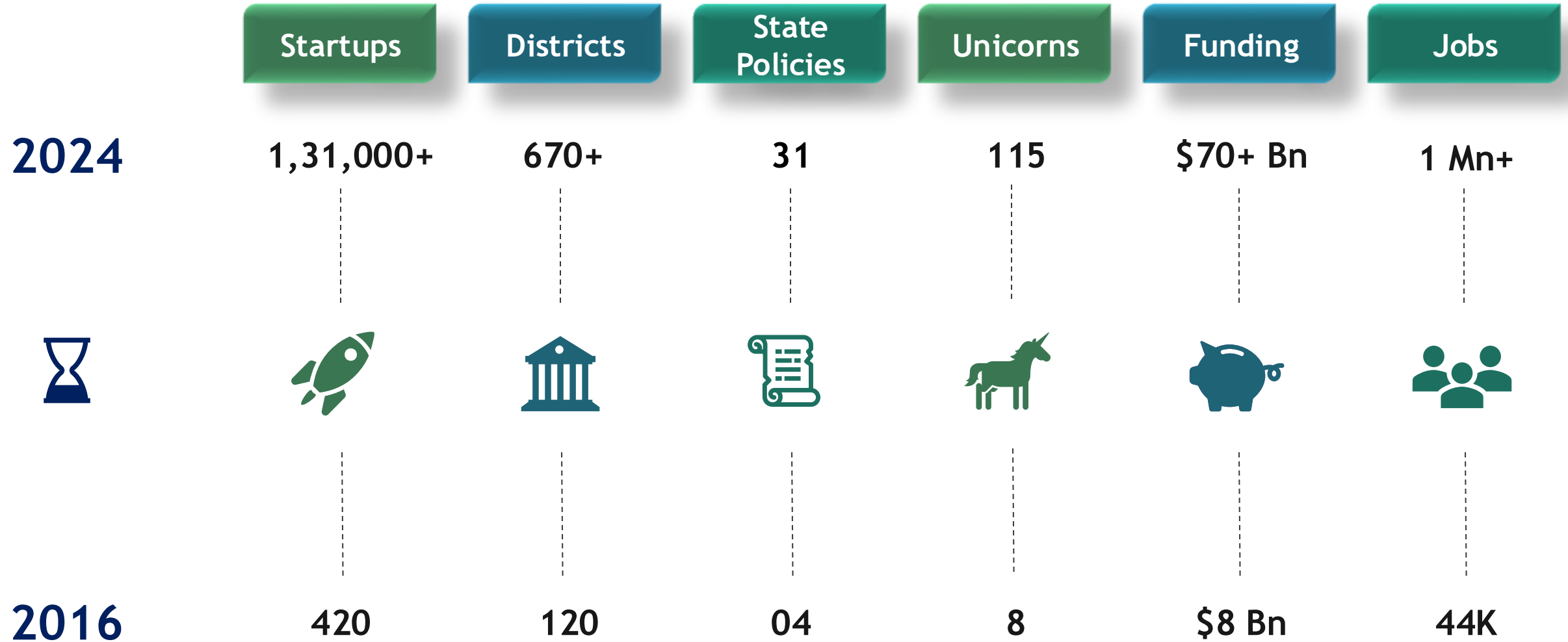


9300+ Jan Aushadhi Kendras to ensure access to affordable medicines

STARTUP ECOSYSTEM IN INDIA



The Innovation Growth Story





INVEST INDIA

Annexure



India Investment Grid

Official Opportunity Discovery Platform



Search

Preferred
Opportunities



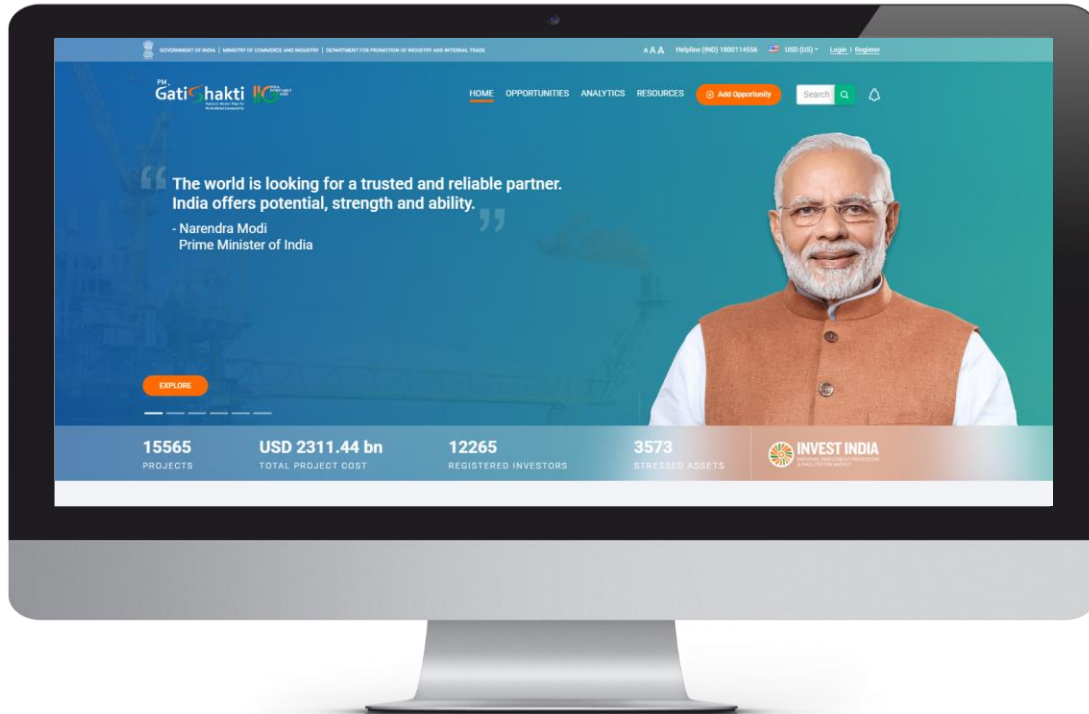
Promote

Projects to
Investors

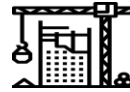


Connect

With Global
Investors



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Projects

Greenfield & Brownfield

15,000+



Exclusively hosted!
**National
Infrastructure
Pipeline**



Stressed Assets

Under IBBI

3,300+



CSR Projects

790+



**National New!
Monetization
Pipeline**



**Green New!
Pipeline**

37,000+
Registered
Users

39
Infra
sub-
sectors

56
Non-infra
sub-sectors

5.9 Mn+
Page Views

85,000+
Twitter
Followers

195+
Countries

70+
Embassies
& Missions

India Investment Grid

Advantage: Ease of Doing Business

Pan-India menu of opportunities

Investors

One-stop source for project information

Easy search via range of search filters

Customized dashboard to track multiple projects

Single Source of Opportunity

Access to Global Investors

Promoters

World-wide promotion of project information

Augmented investor interest capture

Improved pool of project collaborators

Real time Investor connect

Showcase Economic Activity

States

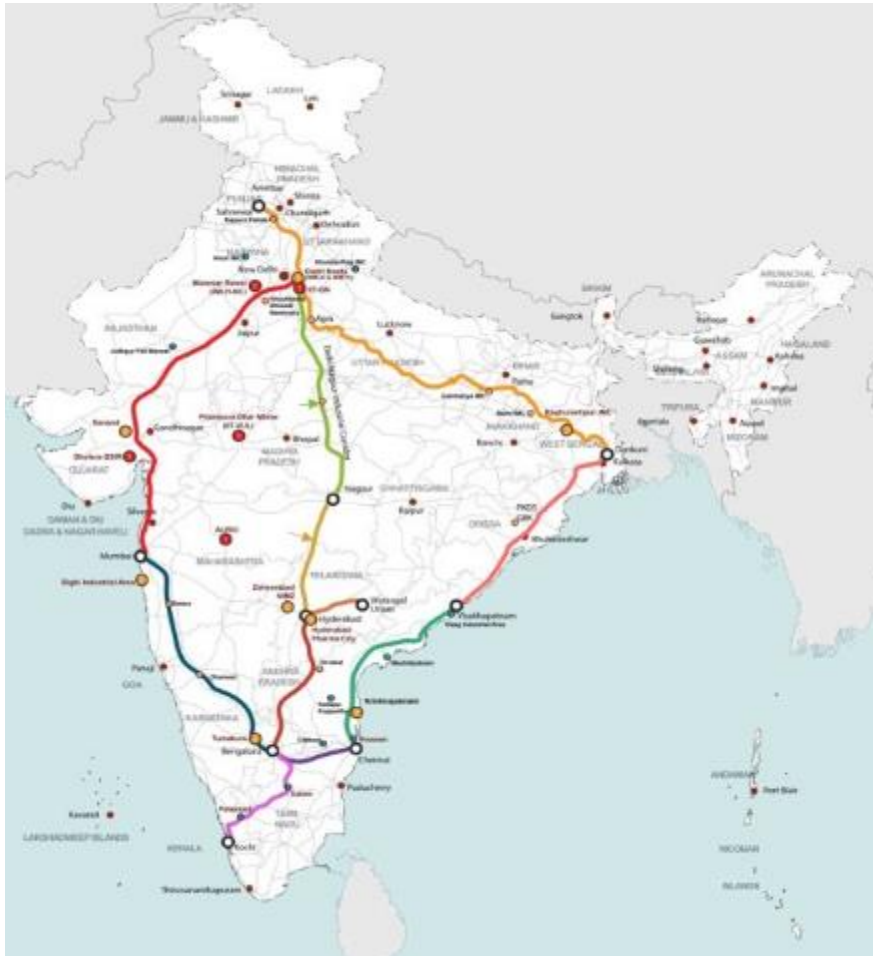
24 x 7 promotion as investment destination

Global visibility of state projects

Improved monitoring of project pipeline

Improved investor targeting

Industrial Corridors Driving Industrial Efficiency



National Industrial Corridor Programme aims to develop futuristic industrial cities to compete with manufacturing and investment benchmarks

11 corridors

India's pioneering infrastructure programme developed with PM GatiShakti principles

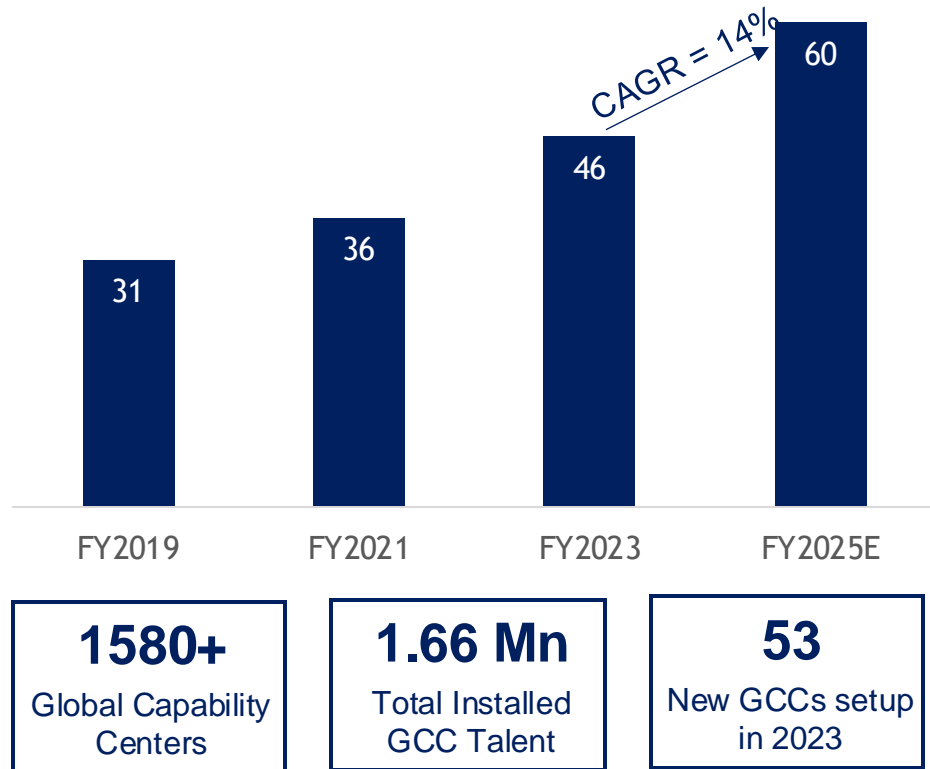
- Delhi-Mumbai Industrial Corridor (DMIC)
- Amritsar-Kolkata Industrial Corridor (AKIC)
- Chennai-Bengaluru Industrial Corridor (CBIC)
- Vizag-Chennai Industrial Corridor (VCIC)
- Odisha Economic Corridor (OEC)
- Delhi-Nagpur Industrial Corridor (DNIC)
- Hyderabad-Nagpur Industrial Corridor (HNIC)
- Hyderabad-Warangal Industrial Corridor (HWIC)
- Hyderabad-Bengaluru Industrial Corridor (HBIC)
- Bengaluru-Mumbai Industrial Corridor (BMIC)
- Extension of CBIC to Kochi via Coimbatore

Global Capability Centers

India is fortifying its position as a key GCC hub

- **Key Drivers:** affordable and abundant digital talent, maturity of start-ups and the peer GCC ecosystem

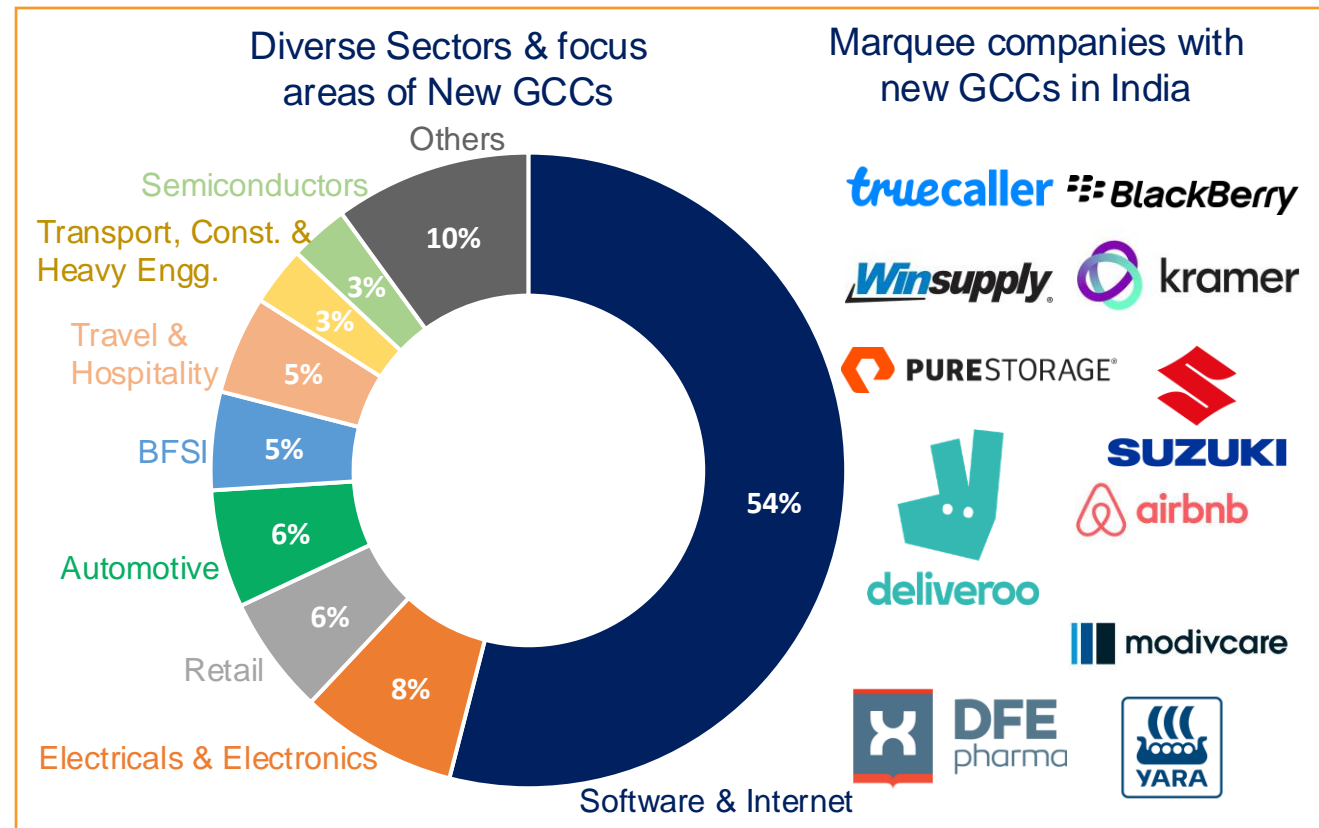
GCC Market Size (\$ Bn)



Source: NASSCOM

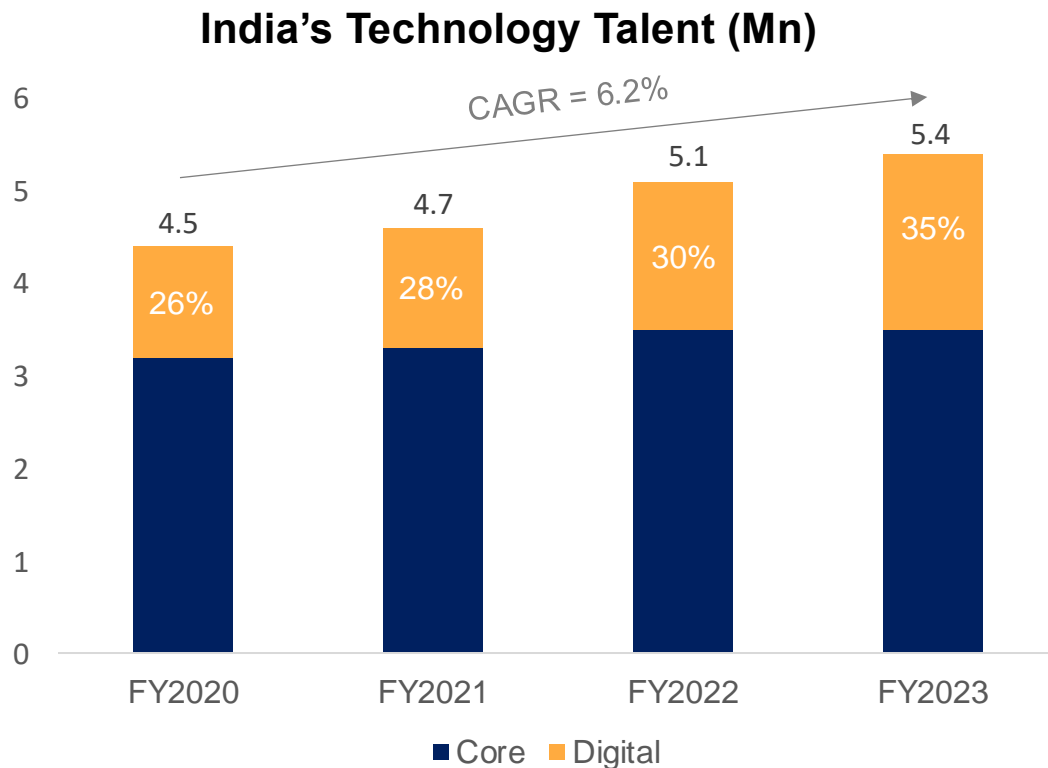
Location Diversification of GCCs

- **52% of new GCCs** are in cities other than Bangalore
- Along with Tier-1 hubs of Hyderabad, Chennai & Mumbai, Tier-2 & 3 hubs of Pune, Kochi and Thiruvananthapuram are coming up
- Growth drivers for Tier-2 & 3 cities : low-cost infrastructure, high quality untapped talent & risk diversification



Technology Talent in India

- FY 2023: Tech talent reached 5.4 Mn with an addition of 290K
- Growing share of digital talent (Artificial Intelligence, Internet of Things, Cloud Computing, Cybersecurity, etc.)



Source: NASSCOM

India's strengths

- 40.1 Mn graduate enrollments in 2023, over 30% in STEM
- Diverse and inclusive workforce
- 19.56 million graduate enrolments in 2023 comes from the rural sector
- Leader in English-speaking talent around the world
- 3rd largest active developer community on Github
- At 23.9%, the tech talent supply gap is lowest among top tech nations
- Rank 1 in AI skill penetration; installed talent base of AI - 416K



A joint initiative by the Ministry of Electronics & IT and NASSCOM to develop the workforce in digital skills

- 10 new emerging technologies targeted - AI, BDA, RPA, Additive Manufacturing/ 3D Printing, Cloud Computing, Social & Mobile, Cyber Security, Augmented/Virtual Reality, Internet of Things and Blockchain
- 13,12,775 candidates have signed-up on the portal, 3,53,654 candidates have, out of which 1,37,645 candidates have completed their course(s).

India Construction Overview

477 Bn

Current Market Size

**3rd
largest**

Global market by 2025

**2nd
largest**

Employer (>50 mn people)

**USD
26.4 Bn**

FDI inflows (cum. Sep 23)

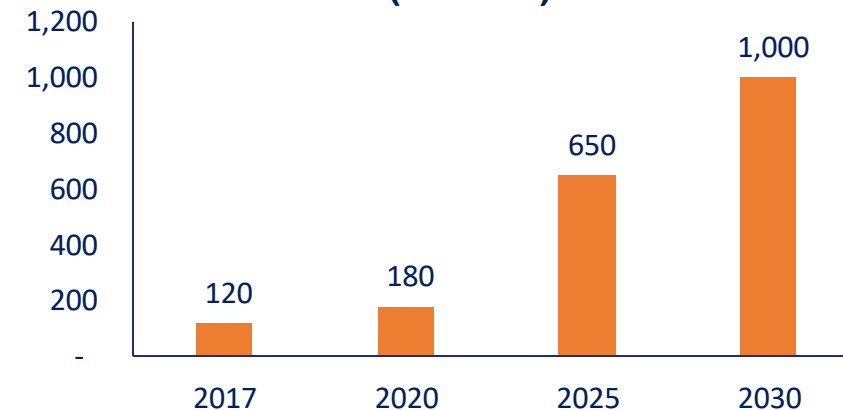
**50%
Urban**

Urban population by 2046

**USD
39 Bn**

Green buildings market -
2025

**Indian Real Estate Market Growth
(USD Bn)**



MAJOR GROWTH AREAS

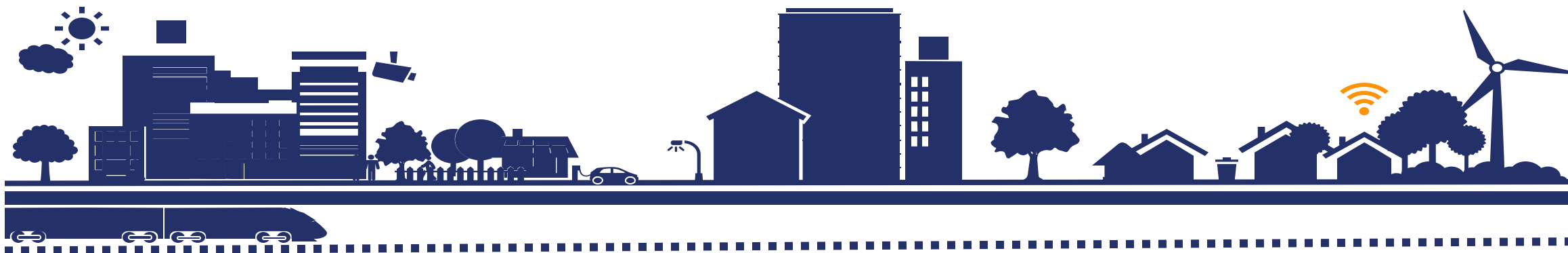
URBAN TRANSIT – 3rd Largest
Metro Network globally - 10
million daily riders

SOLID WASTE MANAGEMENT -USD 1.6
Bn annual Circular Economy potential
(Recycling, Compost & Bio CNG)

OFFICE: 300 mn sq ft office
stock to be added in tier I
cities by 2030

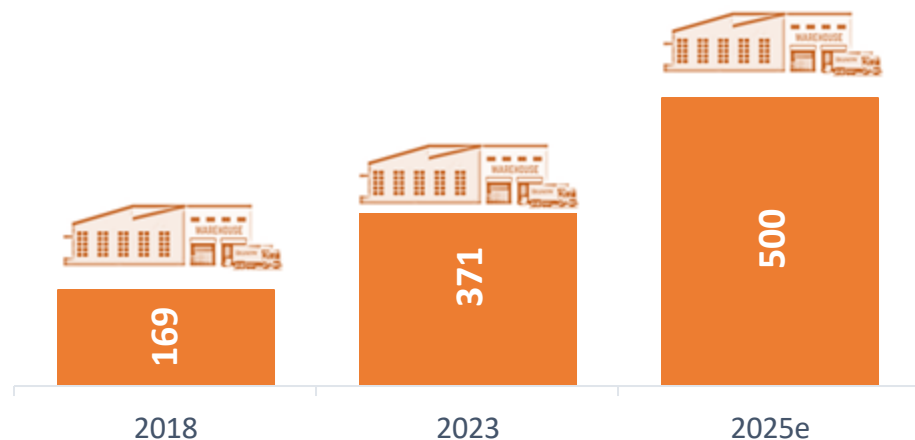
RETAIL: 32 mn sq ft Grade A
Mall stock to be added in top
7 cities by 2025

DATA CENTRES: Demand to
increase by 15-18 Mn sq. ft.
by 2025



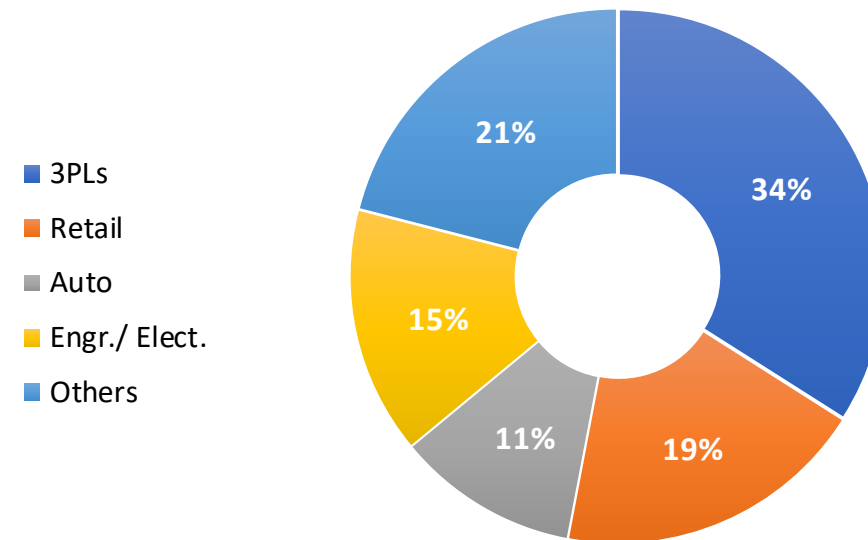
Warehousing-Market Overview

Grade A&B warehousing in top 8 cities (in mn sqft)



Cumulative warehousing space **Grade A&B** in top 8 cities to reach **500 mn sq ft**, driven by rise in 3PL, manufacturing, e-commerce, retail

Warehousing demand distribution across sectors



4 categories namely **3PL, Retail, Auto and Engineering/ Electrical** contributed **81% to the overall warehousing demand (H1 2022)**

Key Warehousing Trends in India

With a CAGR of approx. 15.64%, **Market size projected to reach USD 35 billion by 2027**

Increased interest for GRADE-A warehousing among developers and institutional investors

Warehousing granted infrastructure status and 100% FDI permitted in 2017

3PL and e-Commerce shifting to larger, automated spaces

Urban/In-City logistics emerging in Tier 1 cities as the market is shifting towards on-demand solutions

Omni-channel retailing transforming traditional warehousing into fulfillment centers with higher optimization

Infrastructure Development



Urban Railways

3.7x growth in cities with metro coverage



Aviation

2x in number of Airports



National Highways

1.6x in length of national highways



Waterways

8x in operational national waterways



Ports

2x in handling port capacity



Education Institutes

7 new IITs; **7** new IIMs
15 new AIIMS



Statue of Unity

World's Tallest Statue



Atal Tunnel

World's Longest Highway Tunnel



Chenab Bridge

World's Highest Railway Bridge



Zojila Tunnel

Asia's Longest Tunnel

*last 9 years

Sector Opportunities

URBAN MOBILITY



- Metro rail in **17 cities**, with more than **845 kms** route length
- The government is planning **Light Rail projects** in **22 Tier-II/III cities**
- Development of **Personal Rapid Transit (PRT) system** in Greater Noida and Haridwar on PPP.

WATER & WASTE MANAGEMENT



- **\$233 Bn** indicative budget outlay 2020-2025 for water infrastructure (NIP – JJM, AMRUT and Irrigation)
- **Functional Household Tap Connections, 26 Mn Sewer/Septage Connections** to all Urban/Rural Households by 2024 (Water demand to double by 2030)
- Government promoting Waste to Energy projects

SUSTAINABLE REAL ESTATE



- Green building market will reach **USD 39 bn by 2025** supported by government policies.
- Demand for **25 Mn additional affordable housing units**. Budget 23-24: Housing for all expenditure increased by 66% to **USD 10 Bn**.
- Indian **Real Estate Investment Trusts** are outperforming their global peers.

Central Warehousing Corporation - Asset Monetization



- **37 assets for monetization** under the National Monetization Pipeline (NMP).
- Monetization is envisaged under the **PPP model for a period of 45 years**.
- **The private player to develop, operate, and maintain vacant land** in CWC's existing facilities, generating lease income and paying an Annual Concession Fee to the authority

Development of Multi Modal Logistics Park



- NHLML plans to develop a network of **35 Multimodal Logistics Parks** across India. **15 sites targeted by FY 2024-25**.
- Of these, MMLP Guwahati is Under Implementation and the MMLPs at **Chennai, Indore and Bengaluru have been awarded to private players** for development.
- **Nagpur MMLP** in bidding phase.

Expansion of Warehousing assets

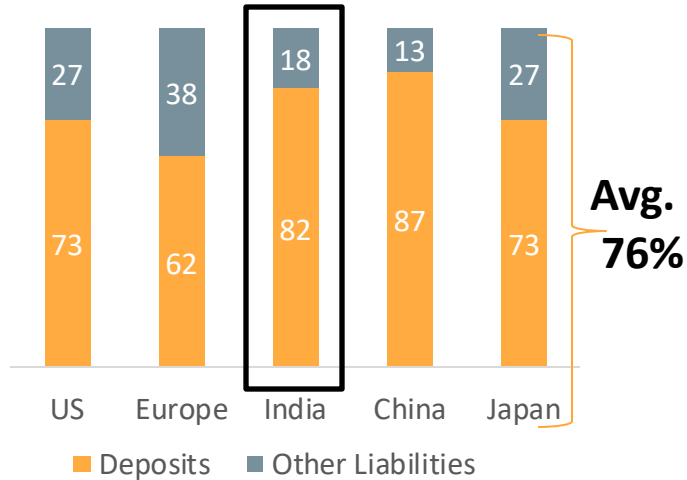


- Expansion of warehousing assets in Tier I cities like Bengaluru, Pune, NCR.
- Rise in warehousing demand in **Tier II locations** such as Assam in North-east, Indore in MP and Visakhapatnam in AP.
- State governments encouraging establishment of **Logistics parks and warehousing assets** through respective logistics policies.

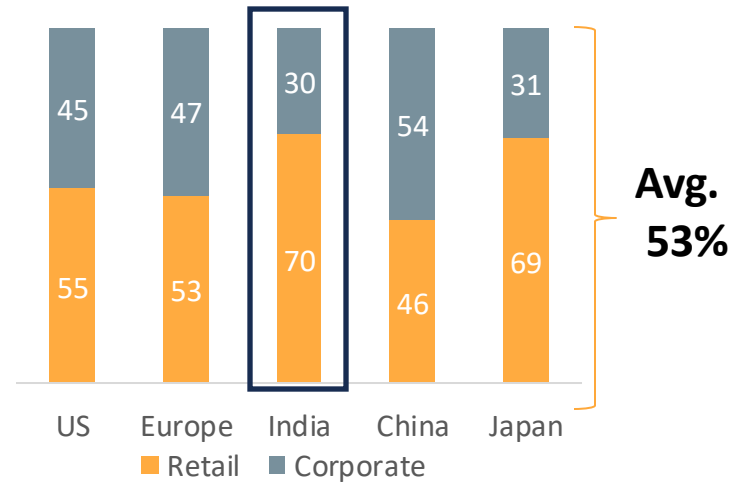
Banking Ecosystem

Indian Banks have a granular & diversified liabilities base, relative to global banks (2022)

Share of Deposits
in total Liabilities (%)

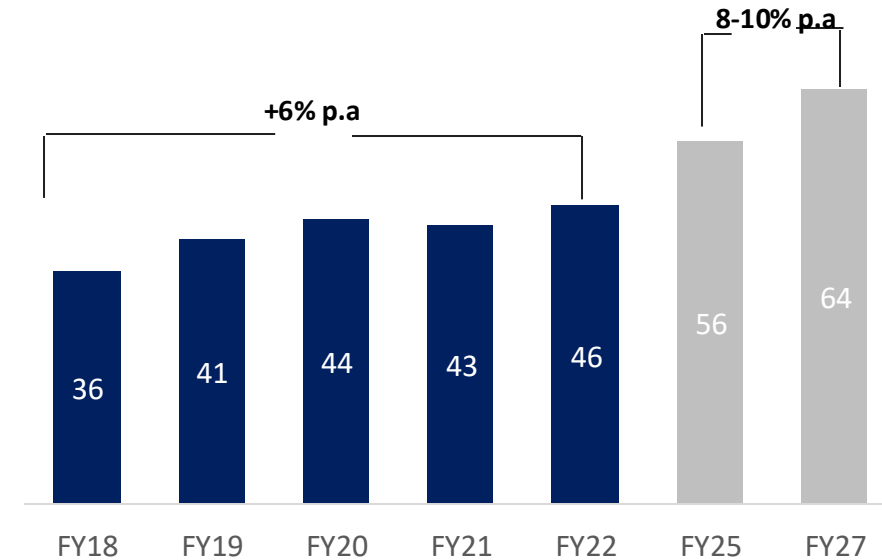


Share of Retail Deposits
in total Deposits (%)



Banks' Wholesale loan growth
(INR Lakh Crores)

8-10% lending growth expected over next 3 yrs



#3

Largest domestic
banking sector
by 2050

\$2.9Tn

Banking Assets

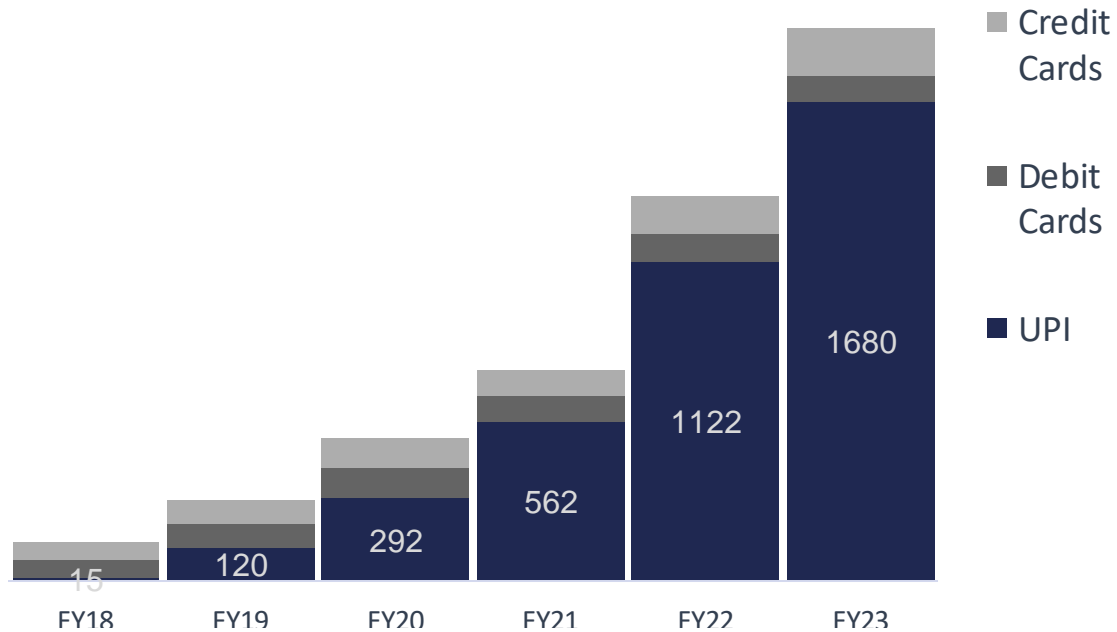
\$3.01Tn

Overall credit
(Mar'23)

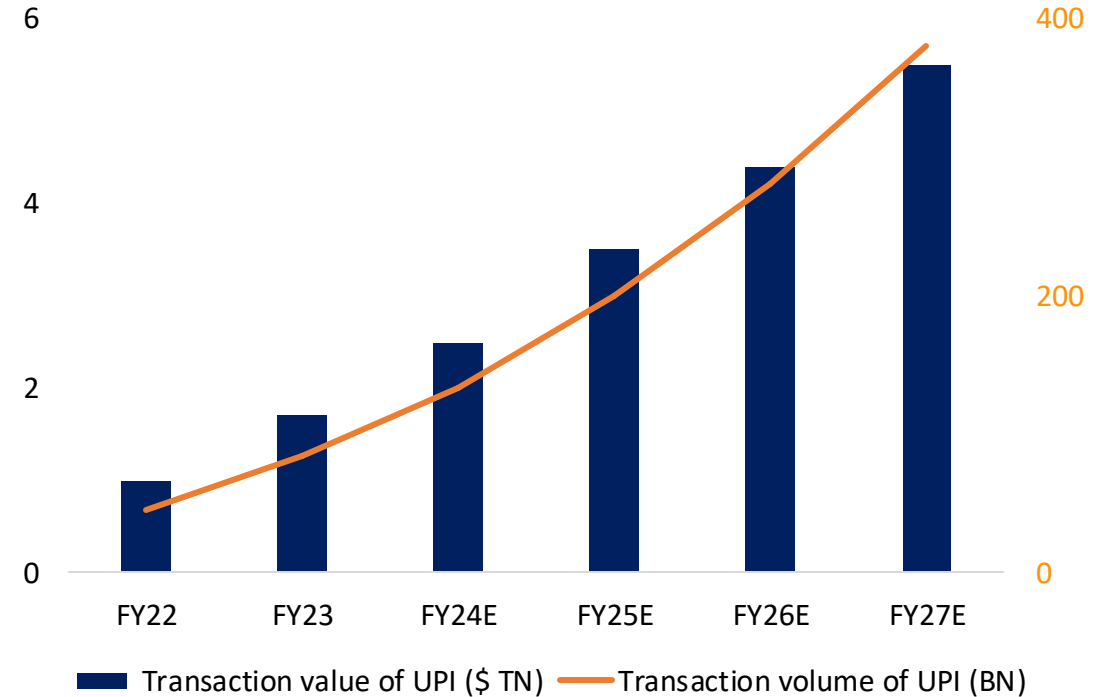
3.2%

GNPA at a 10 yr
low (Sep'23)

India – Retail Digital Payments by value: UPI, Credit & Debit Cards (\$ BN)



UPI - Nation's Fastest Growing Payment Mode



16.3%

Credit growth (FY 24)

12.2%

Balance sheet growth of SCBs reached a 9 yr high (FY 23)

13.8%

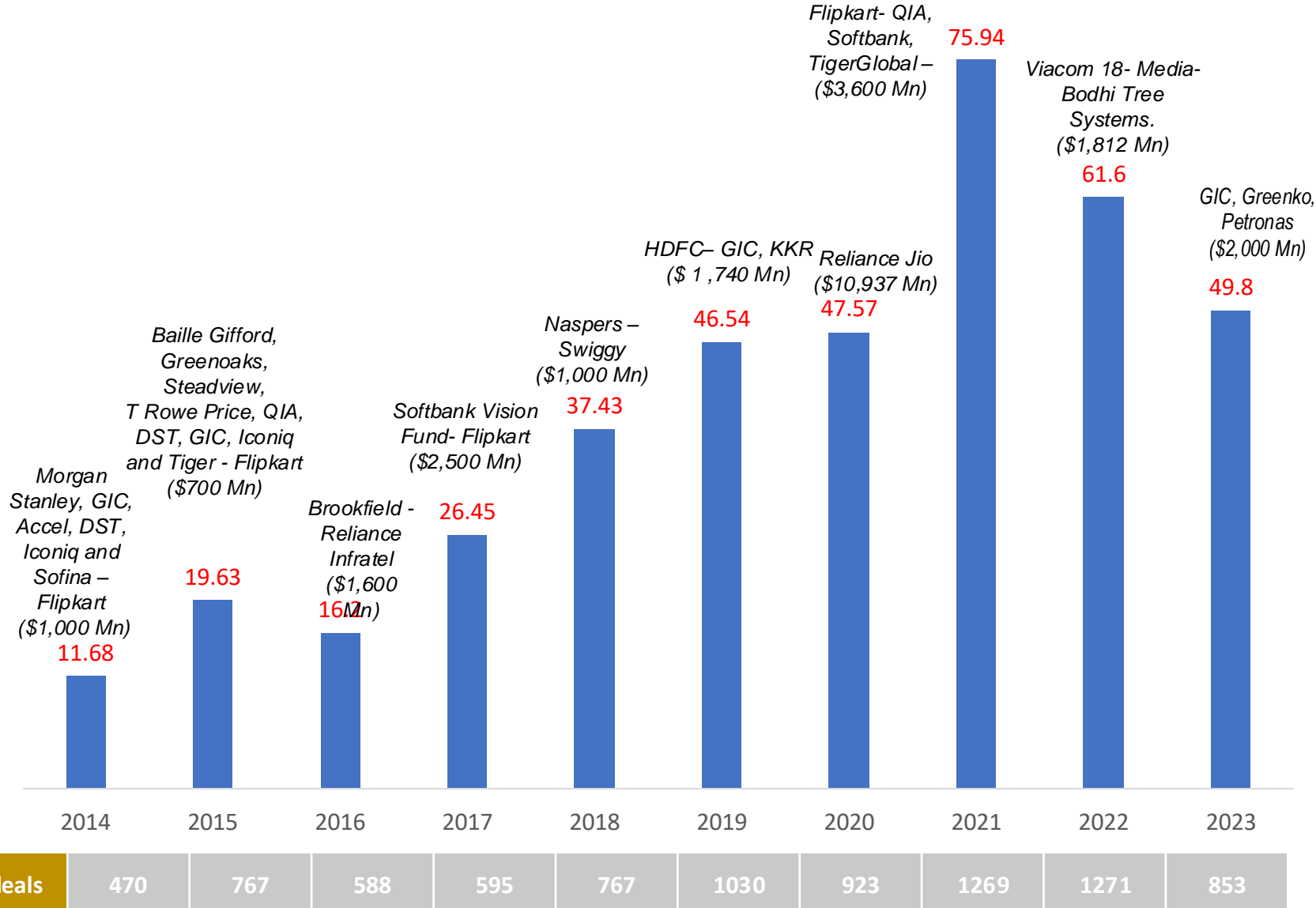
Bank Deposit Growth (Y-o-Y)

80%

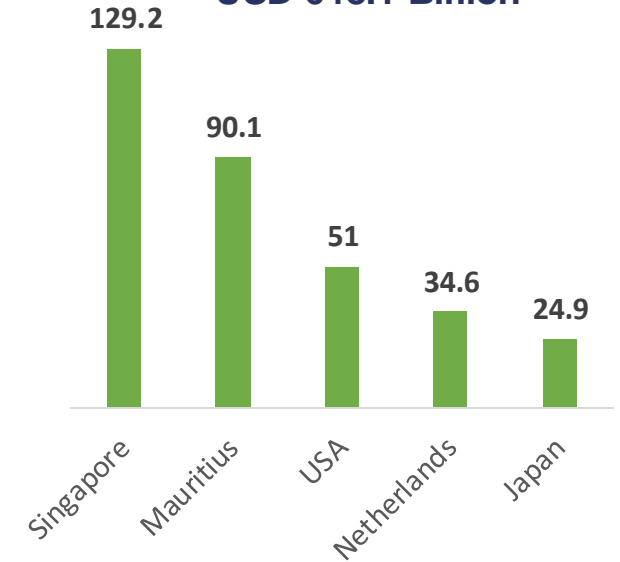
Population in India has a bank account

Trends in PE/VC Investments (2014-2023)

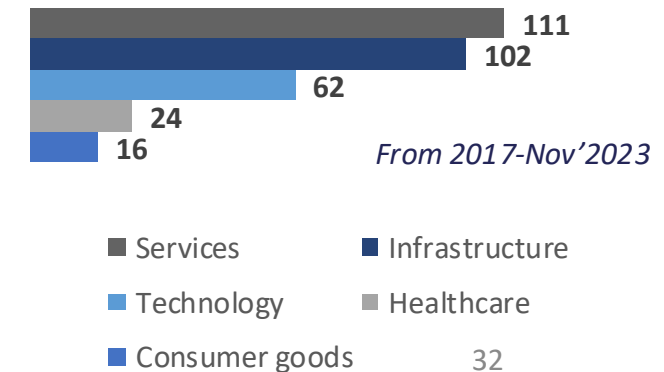
Year-wise PE/VC investments (\$ Bn)



Total FDI Inflow (2014-23) USD 648.1 Billion



Top Sectors by Value in 2023 (\$ Bn)



Ongoing increase in PE/VC allocations

LP-GP India Investment Experience

ADIA Abu Dhabi Investment Authority	Energy Mi	Housing Mi	Highways Mi	Railways	Retail	Consumer goods
FAIRFAX FINANCIAL HOLDINGS LIMITED	Airports M	Logistics M	Financial Services SM	Infrastructure	Retail	Consumer goods
CPP INVESTMENT BOARD	Real Estate M	Financial Services M	Logistics SM	Healthcare	Financial Services	Retail
TEMASEK	Financial Services Mi	Logistics Mi	Energy Mi	Healthcare	Natural Resources	Consumer goods
CDPQ	Renewables M	Logistics M	Real Estate M	Healthcare	Financial Services	Retail
PSP INVESTMENTS	Highways M			Energy	Telecom	

Key trends in 2023



Share of India in APAC PE-VC Investments grew



Strong fund-raising momentum, partly led by 2021-22 commitments



ESG-themed investments grew to \$4.5 Bn



Rise in LP confidence in India corporate ecosystem



Best year for PE/VC backed private credit investments in India, recording \$7.8 Bn

THE CARLYLE GROUP	IT, Healthcare, Transport, Financial Services, Logistics
Brookfield	Infrastructure, Real Estate, Distressed Assets
KKR	Financial Services, Infrastructure, Hospitality
SEQUOIA	Software, Food Products, Healthcare
Blackstone	IT, Financial Services, Energy, Healthcare
Accel	Financial Services, Healthcare, Software

India : Fastest Growing Large Economy



DEPARTMENT FOR PROMOTION OF
INDUSTRY AND INTERNAL TRADE
MINISTRY OF COMMERCE & INDUSTRY,
GOVERNMENT OF INDIA



INVEST INDIA
NATIONAL INVESTMENT PROMOTION
& FACILITATION AGENCY



GDP: Growth Rate of 8.2% FY 23-24



Gross FDI: FDI inflow 2014-23: USD 596 billion has increased by 100% over the previous 9 financial years (2005-14: USD 298 billion) and is nearly 67% of the total FDI reported in the last 23 years (USD 971 billion)

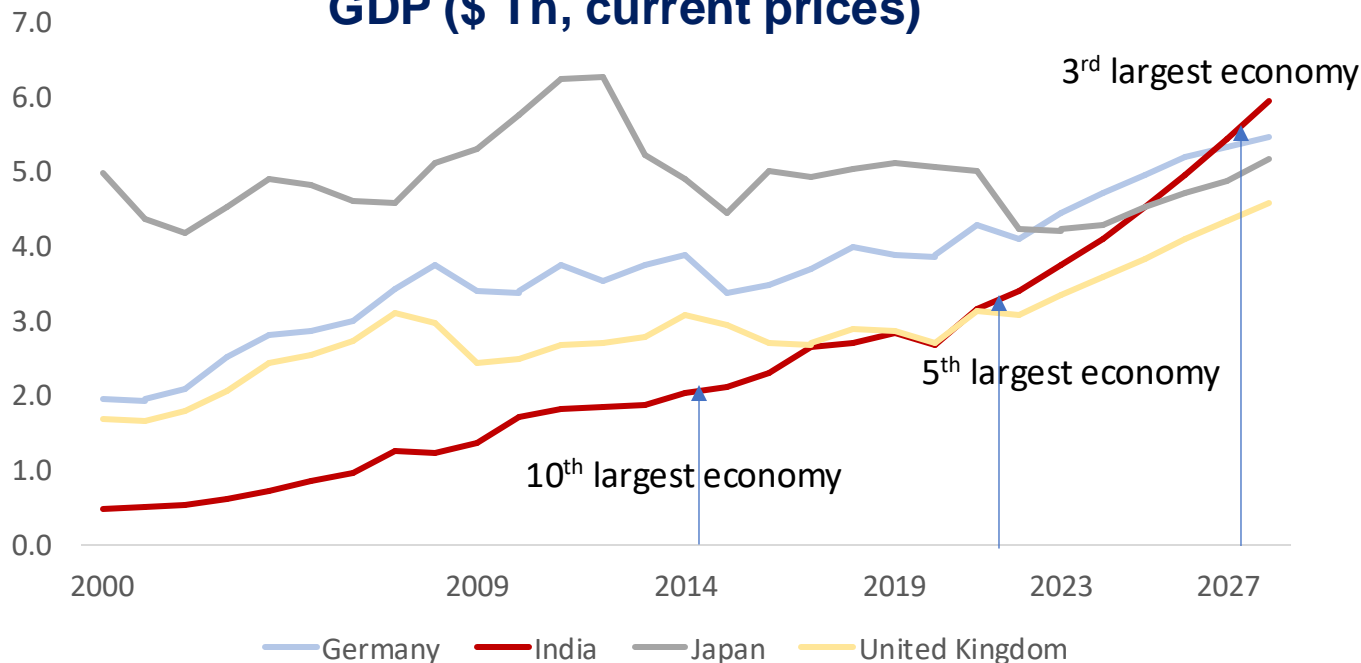


Exports: \$776 B (FY23): 2x since FY14; \$ 2Tn by 2030

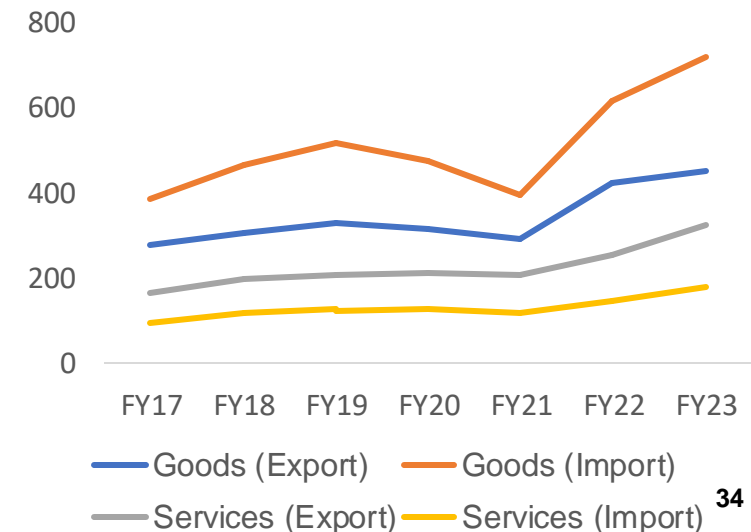
Annual FDI (\$ Bn)



GDP (\$ Tn, current prices)



Trade (\$ Bn)



India: Global Coverage

Economic Superpowers Like India Reshaping Global Economy: Rishi Sunak

Insisting that "more will change in the next five years than in the last 30", Rishi Sunak, during his speech on security at the Policy Exchange think-tank, spoke on a "clear plan and bold ideas" to deliver a secure future for the Britons.

India News | Indo-Asian News Service | Updated: May 13, 2024 9:01 pm IST



India strikes free trade deal with countries including Switzerland

FINANCIAL TIMES MARCH 10 2024

Pact promises \$100bn investment

India seen to emerge as an economic superpower in impending problem-ridden global financial landscape

THE ECONOMIC TIMES May 25, 2024,

India Remains a Bright Spot in Global Economy

Domestic demand and state investment contributed to another strong quarter

THE WALL STREET JOURNAL. Nov. 30, 2023

India Tops Hong Kong as World's Fourth-Largest Stock Market

Bloomberg

23 January 2024

- South Asian nation remains a preferred market for investors
- China's economic struggles have stymied growth in Hong Kong

India's Infrastructure Push Is Key to Taking on China

THE WALL STREET JOURNAL. Dec. 28, 2023

Infrastructure investment could be a backbone of India's economic growth. It just needs a lot more private money.

India will be world's third largest economy in 4 years: IMF chief economist

Sep 10, 2023

India Remains a Bright Spot in Global Economy

THE WALL STREET JOURNAL. Nov. 30, 2023

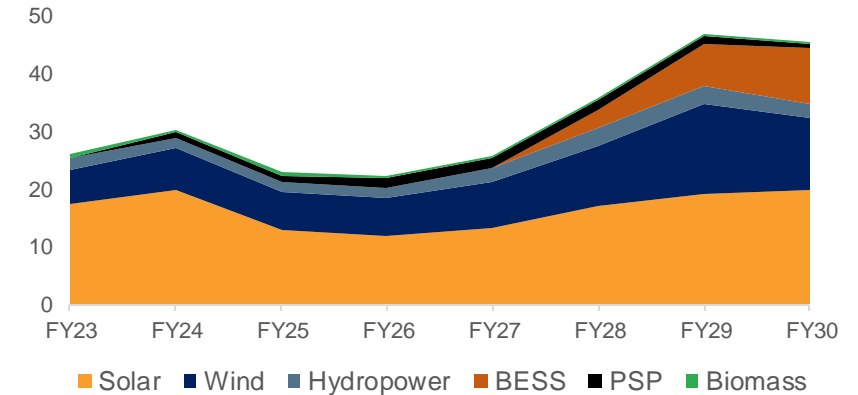
Domestic demand and state investment contributed to another strong quarter

RE: Investment Required & Policy Ecosystem

By 2030, a cumulative investment of **\$380 Bn** will be required across various areas of India's RE sector

\$130 Bn Solar	\$72 Bn Wind
\$18 Bn Hydropower	\$4 Bn Biomass
\$96 Bn Green Hydrogen	\$60 Bn Energy Storage
\$26 Bn Onshore RE Transmission	\$3 Bn Offshore RE Transmission

Annual investment in RE & storage will need to almost **double** from **\$25 Bn** in FY23 to **\$45 Bn** in FY30



Enabling Policies and Incentives

RE Generation

- **PLI Scheme** for solar PV modules manufacturing
- **100% FDI** automatic route
- **Innovative market platforms** exclusively for trading of RE

Electricity Transmission

- **Tariff based competitive bidding**
- **Waiver on Inter-State Transmission charges** for transmission of solar and wind energy
- **Clear roadmap till 2030** providing visibility of future projects

Energy Storage

- **Viability Gap Funding** for 4,000 MWh Battery Storage
- Detailed framework for **pumped storage** under formulation
- Issuance of **Energy Storage Obligation** till 2030

Green Hydrogen

- **National Green Hydrogen Mission** \$2.4 Bn outlay upto FY30
- Demand aggregation framework for **procurement of Green Ammonia** under development
- **Identification of Pilot projects and hubs**

Delivering through Sustainability

Taking global responsibility, a shared commitment for a better world

India's Achievements & Vision

4th globally in Renewable Energy Installed Capacity, 4th in Wind Power capacity and 5th in Solar Power capacity

#7 Climate Change Performance Index (CCPI 2023) - India at best among G-20 countries

Expected: 13.5 GW RE capacity to be installed with ₹74,000 crore investment.

The Government is implementing the PLI Scheme for the National Programme on High Efficiency Solar PV Modules to achieve Gigawatt manufacturing capacity.

India's Energy commitments

Raise non-fossil fuels-based energy capacity to 500 GW by 2030

Reduce total projected carbon emission by 1 Bn tonnes by 2030

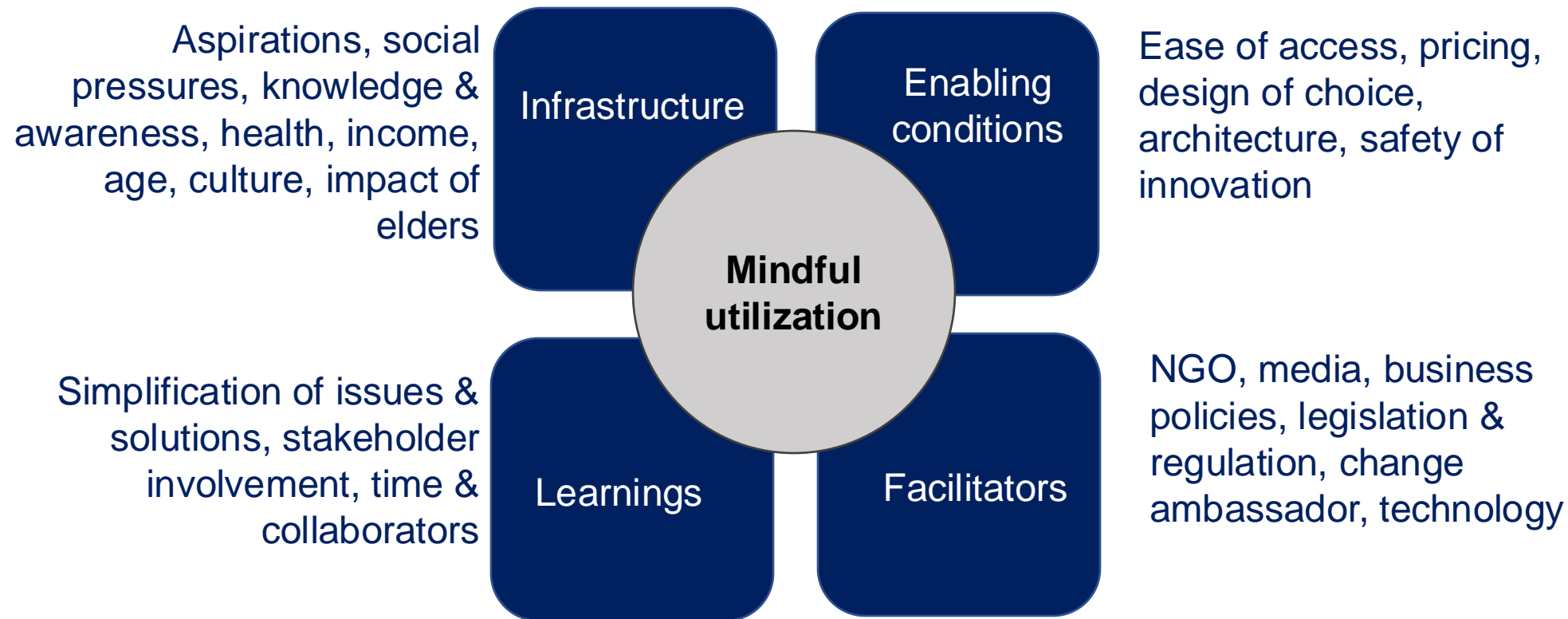
Meet 50% country's energy requirements using renewable energy sources by 2030

Net-zero emissions by 2070

Delivering through Sustainability

Taking global responsibility, a shared commitment for a better world

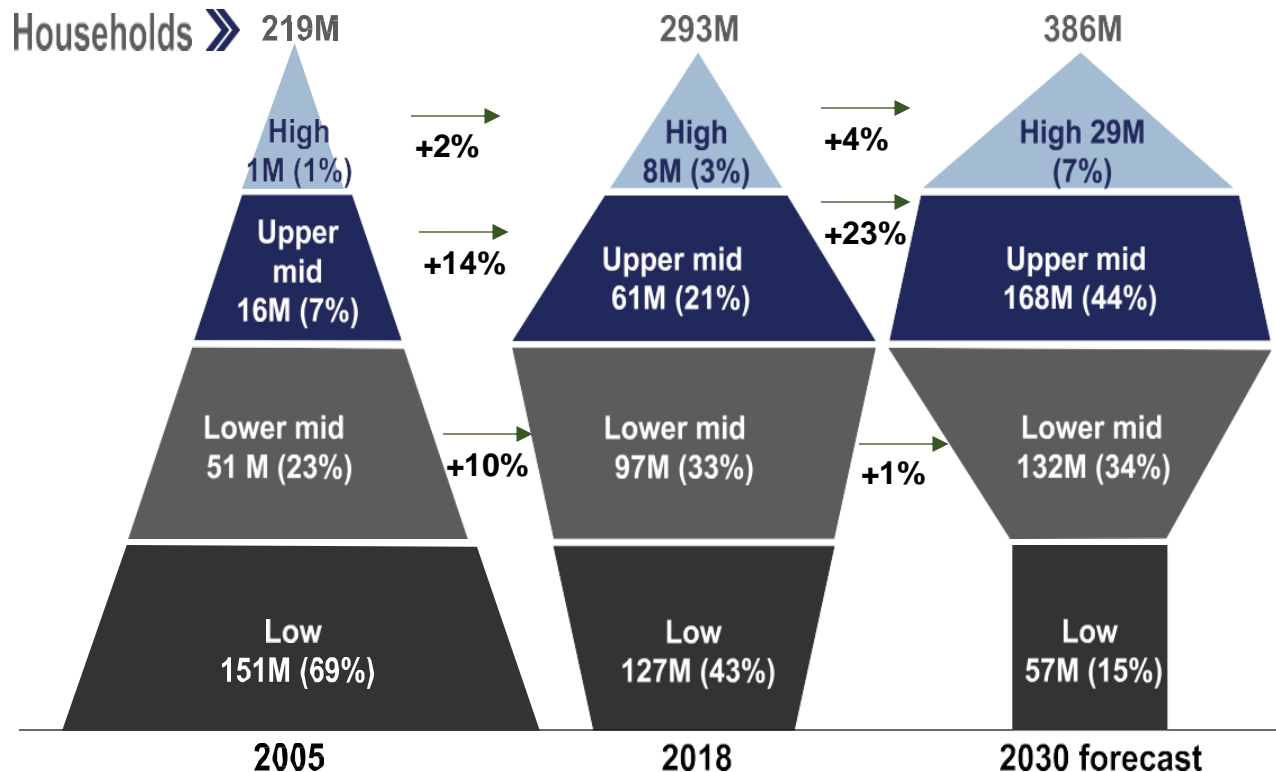
LiFE (Lifestyle for Environment) Mission envisions replacing the prevalent 'use-and-dispose' economy with a circular economy, which would be defined by mindful and deliberate utilization



Inclusive Growth

Boosting Economic Growth & Demand

Evolution of the household income profile to power domestic consumption by 2030



Growing demand in key aspects (By 2030)



Education: 800 new universities & 40k new colleges



Healthcare: 3 Mn additional hospital beds required



Auto: 50 Mn EVs on road by 2030



E-commerce: ~150 Mn online shoppers to get added by 2030

STARTUP INDIA HUB

Resource Partnered
Services



Learning & Development
Programs



Tools & Templates



MAARG for mentorship



Marquee Programs



Schemes & Policies



Ecosystem Network



Publications & Reports

716k+

REGISTERED
USERS

240k+

AVG MONTHLY
VIEWS

62k+

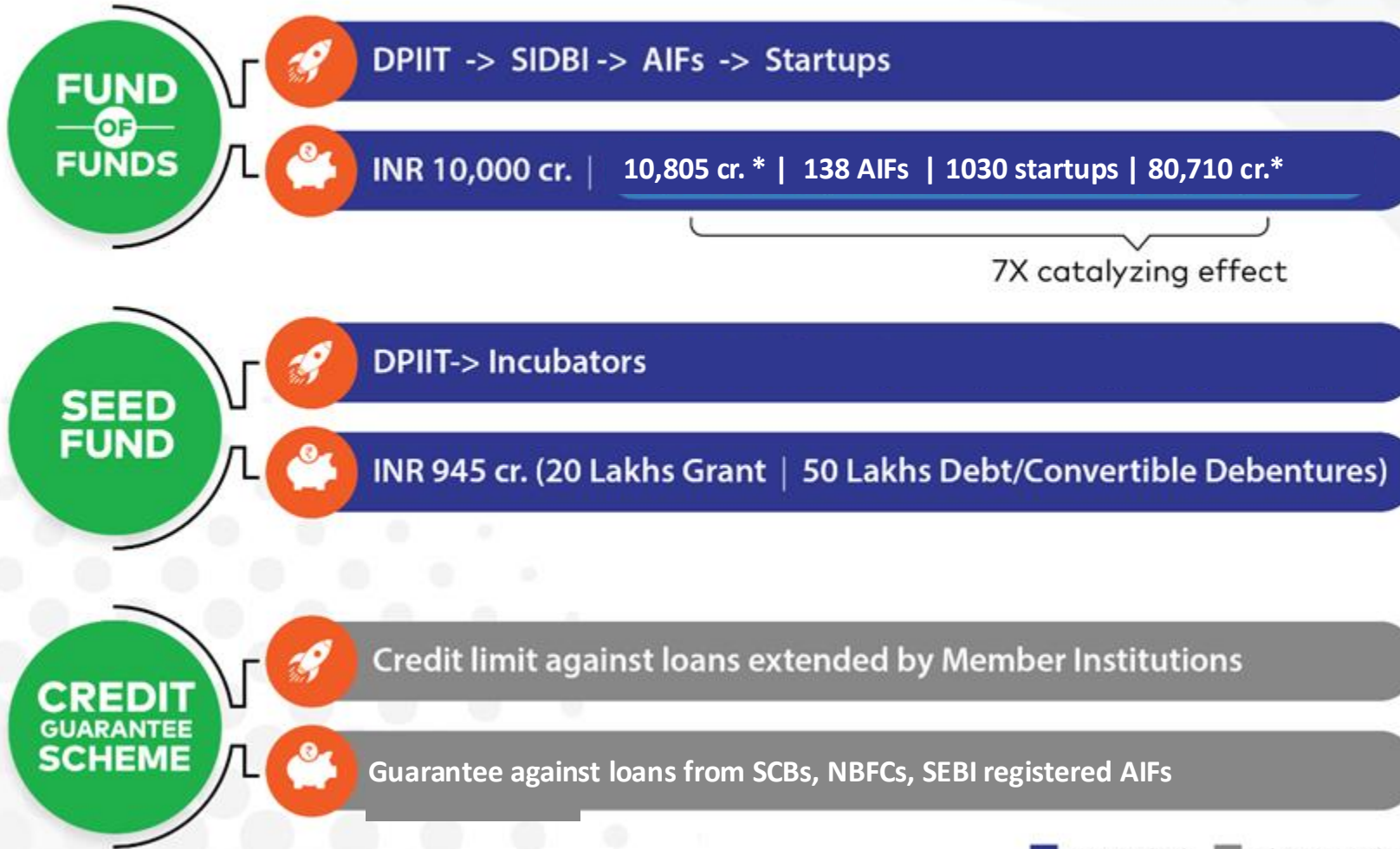
CHATBOT QUERY
RESPONSES

219k+

CONNECTS

www.startupindia.gov.in

ACCESS TO FUNDING



■ Operationalized ■ To be operationalized

*Amount approved to AIFs till 31st March 2024



MARKET ACCESS

GOVERNMENT ENGAGEMENTS



17092

Registered startups

1,86,414

Volume of Orders

11,126.98
Cr

Total value

11+

Government
Connects



Startup for public Services



Open Innovation Challenges



Incubation & Mentorship
Support

20+

Partner
Ministries/
Departments

DOMESTIC & CORPORATE ENGAGEMENTS

250+

Corporate
Partnerships



Pilot Orders



Mentorship

870+

Winner
Benefitted



Cash Grants



Co-create Innovation

₹70Cr+

Cash Prizes &
other incentives



Incubation



Prototype