New India

FASTEST GROWING ECONOMY
- 7.7%
- $2.6T

TOP INVESTMENT DESTINATION
- $222B
- Apr 2014 - May 2018

POPULATION
- 1.5B
- 2025
- 29
- 2025

CONSUMPTION
- $4T
- 2025
- $245,000
- (BCG)

VOTERS
- 834MM
- 2014
- 553MM

NEW VOTERS
- 117MM
- 2014
- 133MM
- (97 MM)
- 2019
### Make in India: $4.8 Trillion Opportunity by 2025

<table>
<thead>
<tr>
<th>Sector</th>
<th>Value</th>
<th>Sector</th>
<th>Value</th>
<th>Sector</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Auto</td>
<td>$300 B</td>
<td>Auto Comp</td>
<td>$115 B</td>
<td>Biotech</td>
<td>$100 B</td>
</tr>
<tr>
<td>Chemicals</td>
<td>$400 B</td>
<td>Construction</td>
<td>$640 B</td>
<td>Capital Goods</td>
<td>$112 B</td>
</tr>
<tr>
<td>Electronics</td>
<td>$400 B</td>
<td>Food Processing</td>
<td>$320 B</td>
<td>IT/BPM</td>
<td>$350 B</td>
</tr>
<tr>
<td>Auto Comp</td>
<td>$115 B</td>
<td>Defence</td>
<td>$130 B</td>
<td>Leather</td>
<td>$30 B</td>
</tr>
<tr>
<td>Aviation</td>
<td>$82 B</td>
<td>Defence</td>
<td>$130 B</td>
<td>Leather</td>
<td>$30 B</td>
</tr>
<tr>
<td>Biotech</td>
<td>$100 B</td>
<td>Railway</td>
<td>$142 B</td>
<td>Textiles</td>
<td>$223 B</td>
</tr>
<tr>
<td>Mining</td>
<td>$80 B</td>
<td>Renewables</td>
<td>$260 B</td>
<td>Thermal Power</td>
<td>$125 B</td>
</tr>
<tr>
<td>Oil &amp; Gas</td>
<td>$110 B</td>
<td>Roads</td>
<td>$150 B</td>
<td>Tourism &amp; Hospitality</td>
<td>$419 B</td>
</tr>
<tr>
<td>Pharma</td>
<td>$55 B</td>
<td>Media &amp; Entertainment</td>
<td>$30 B</td>
<td>Wellness</td>
<td>$7 B</td>
</tr>
<tr>
<td>Pharmaceuticals</td>
<td>$55 B</td>
<td>Wellness</td>
<td>$7 B</td>
<td>Ports</td>
<td>$150 B</td>
</tr>
<tr>
<td>Pharmaceuticals</td>
<td>$55 B</td>
<td>Wellness</td>
<td>$7 B</td>
<td>Space</td>
<td>$40 B</td>
</tr>
<tr>
<td>Pharmaceuticals</td>
<td>$55 B</td>
<td>Wellness</td>
<td>$7 B</td>
<td>Ports</td>
<td>$150 B</td>
</tr>
<tr>
<td>Pharmaceuticals</td>
<td>$55 B</td>
<td>Wellness</td>
<td>$7 B</td>
<td>Space</td>
<td>$40 B</td>
</tr>
</tbody>
</table>
India: A Leader Across Diverse Sectors

- Attractive Investment Destination
- Domestic air traffic Growth - 23%
- IT / BPM services sourcing market
- Choice of overseas R&D Destinations
- eCommerce Market Growth - 30%
- Commercial Vehicle Market Growth - 5%
- Provider of generic drugs
- Food Production
- Smartphone Market
- Largest Road Network
- Largest Startup ecosystem
- Largest Pharma & Biotech talent pool
Doing Business, Made Easy

↑ 42 places
Ease of Doing Business Ranking
#100 (2018)

↑ 21 Places
Global Innovation Index
#60 (2017)

↑ 19 Places
Logistics Performance Index
#60 (2016)
The Opportunity 2025

- New High Speed Railways: 10,000 km
- New Express Highways: 1000 km
- Airports to be redeveloped: 800
- Smart Cities: 600+
- Logistics Park: 400
- Industrial Corridors: 175 GW
- Renewable Energy: 100+
- Roads: 40 km/day
- Dry Ports: 35
- Total Metro Length: 20+
- World Class Railway Stations: 5
India-Japan: The Special Bond
Japan in India

185 institutions teach Japanese in India
24,000+ students learn the Japanese language in India p.a.

Japan to hire 200,000 IT professionals from India

5,000+ Indians live in the Tokyo suburb

9,000 + Japanese Nationals in India

Japanese’s favorite since 1927: The "Indo Karii" at Nakamuraya in Shinjuku, Tokyo - over 6 billion helpings served annually.
An Ever—strengthening Bond

(Source) Survey by Embassy of Japan in India and JETRO (Data for 2006 is as of January. Data for 2007 is as of February. The rest of the years are as of October)

* Revised at the time of survey for 2015
Dedicated townships for Japanese Investors

7 Operational and 5 Potential Japanese Industrial Townships
BLUE SKY INITIATIVE: Japan’s co-operation in India’s environment

Waste to Energy
- Hitachi Zosen India
- Nippon Steel & Sumikin Engineering
- JFE Engineering India

Solar Pump System for Irrigation
- NIDC India

Biomass Fuels
- Mitsubishi Heavy Industries
- IHI Corporation

Environmental Equipment for Coal Thermal Power Plants
- Mitsubishi Hitachi Power Systems India Pvt. Ltd.

Dust Suppressants
- Nitto Denko India Pvt. Ltd.

Next Generation Vehicle
- Nitto Denko India
- Maruti Suzuki India
- Toyota Kirloskar Motors
- Honda Cars India

Intelligent Transport System
- NEC India Pvt. Ltd.
- Hitachi India Pvt. Ltd.
- Fujitsu India Pvt. Ltd.
- Zero-Sum ITS Solutions India Pvt. Ltd.
- JICA

Smart Telecom Towers
- NEC India
THE MAGIC OF PARTNERSHIP:

Maruti Suzuki’s Magic in India
- 35+ years of production
- Exports to 125+ countries
- 3257 Sales Outlets
- 3440 Service Workshops

Market cap figures (As on 1st June 2018) (In USD Millions)

Maruti Suzuki: 38,224.4
Suzuki: 25,434.8
“We aim to continue our double digit growth... we would be around Rs. 3,500 crore by FY 2020. 2017 was a great year for us after introduction of GST, and first time we grew in double digit and from there we have a momentum now.”

Kazutada Kobayashi
President and CEO
Canon India
KEY AREAS OF COLLABORATION
**Food Processing**
- 1st: Milk Production, Livestock Population, Millets Production
- 2nd: Fish, Rice, Wheat, Cereals, Fruits & Vegetables, Total Food Production
- 42: Mega Food Parks by 2019

**Indian Healthcare Sector:**
- **Market Size:** US$ 100 BN
- **Ayushman Bharat** – largest public health scheme in the world: 500 mn people

**Indian Medical Devices Sector:**
- **Market Size:** US$ 6.2 BN*

**Textile**
- #1: Cotton & Jute producer
- #2: Producer of silk
- #2: Exporter of Textiles & Apparel
- 95%: Hand-woven fabrics of the world - Made in India
- Areas for Synergies: Technical textiles | Advanced textiles machinery | Retail Apparel Brans

**Auto & Auto Components**
- #1: in Tractor Manufacturing
- #2: in Two-wheeler Manufacturing
- #3: in Truck Manufacturing

**Areas of Synergies:**
- R&D Hub
- EV Manufacturing

**Renewable Energy**
- Largest Expansion Plan Globally: 175GW by 2022
- 50 solar parks of 40GW & 60 solar cities approved
- New areas: Off-Shore Wind Farming & Wind-Solar Hybrid

**ESDM**
- 1000 + GW
- 2nd: Renewable Energy Attractiveness Index
- Largest: Solar Plant & solar park

**Total Demand ($BN)**
- FY09: 45
- FY14: 42
- FY20: 100

**Total Domestic Production ($BN)**
- FY09: 20
- FY14: 125
- FY20: 227
FOOD PROCESSING

- Cold Chain: 133
- Mega Food Park Projects: 101
- Food Testing Laboratories (have been approved): 42
- Abattoirs: 38

MEDICAL DEVICES

- Value of health IT market: 8.2Bn
- Estimated size of medical Devices Indian market in 2020: 1.5Bn
- Families to be covered by the largest health protection scheme - Ayushman Bharat: 1.6Mn

TEXTILES

- Market Size by 2021: $238Bn
- Current Market Size: $137Bn
- Textile parks to be developed (19 operational): 74
- 5th Largest: 5th Largest Consumer market and consumer spending by 2025

AUTO & AUTO COMPONENTS

- Domestic Aftermarket Turnover by 2026, up from USD 43.5 billion (2016-17): $200Bn
- Expected growth CAGR to 2026: 15%
- Expected global rank of Indian automotive market by 2020: 3rd

RENEWABLE ENERGY

- GW Potential of RE in India: 1000+
- Solar cities to be developed: 175GW
- Target by 2022: 100Bn
- Targeted share of RE in energy mix by 2030 (from present 20%): 60
- 40%

ESDM

- New mobile phone and its components manufacturing units set up in last 3 years: 120
- Share of electronics manufacturing in GDP by 2022: 25%
- Largest mobile phone manufacturer in the world, only second to China: 2nd
- Across technology, electronics and telecom in coming 5 years: $1 Tn
2nd Largest Startup Ecosystem

- 20,000+ Startups in India
- $50 Bn Valuation
- 200+ Incubators/Accelerators
- $172 Bn Funding since Jan’16

- 28 Yrs Avg. age of founders
- 40% Incubator Annual Growth
- 9% Women Entrepreneurs (100% growth in last 12 months)
- 700+ Startups arising from unicorns

Startup Hubs:
- Delhi
- Mumbai
- Bengaluru
- Hyderabad
- Chennai
- Kochi
- Bhubaneswar
- Jaipur
- Ahmedabad
- Pune
- Indore
- Coimbatore
- Indore
- Jaipur
- Ahmedabad
- Kolkata
- Bengaluru
- Chennai
- Kochi
- Bhubaneswar
- Hyderabad
- Indore
- Coimbatore

INVEST INDIA
World’s most awarded IF
India-Japan Empowering Start-Ups

- Indo-Japan Startup Hub: JETRO, NASSCOM & IIM Bangalore partner to set up a startup centre
- Dream Incubator: 5 billion yen ($44.3 million)
- New Agri-Food Technology - ‘Gastrotpe’ by Japan’s Mistletoe, in partnership with GSF India and Infobride
- Sega Sammy partners with GHV Accelerator to invest a min. seed fund of $100,000 each in 10 startups
- Innovative solutions for capital markets and investment banking: Nomura Holdings has selected IT startups in India to build the smart solutions
Invest India, a one-stop shop for investors

**GOVERNMENT**
- Centre / States
- Foreign Missions / Agencies

**INDUSTRY**
- Associations / Corporates
- Professional Advisors / Academia

- Awareness & Engagement
- Business Advisory
- Strategy & Implementation
- Investor Aftercare
- Long term partnership
- Opportunity Assessment
- Partner / Location Search
- Market Strategy
- Regulatory Clearances
- Policy Guidance
- Issue Redressal
- Continuous Engagements

- UNCTAD Award for World’s Best Practice IPA 2016
- IPA in South Asia, East Asia, Oceania 3 times in a row
- Best Investment Deal for IUIH 2016
- Investment Award 2016 from the Indian Ocean Rim Association (IORA)
Dedicated team to facilitate and fast track investment proposals from Japan

Partners: METI, JETRO, Invest India

Mandate:
- Handholding Japanese investments across sectors.
- Assistance to Core-Group to ¥ 3.5 trillion facilitate investments
- Fast-track Issue Resolution
India Investment Grid

INDIA INVESTMENT GRID
Explore opportunities in India

PROMOTERS 1086
DISTRICTS 498
PROJECTS 3722
OPPORTUNITY USD 186.9 bn

World’s Most Awarded Investment Promotion Agency
IIG: Pan-India Network
IIG: Project Wise Details
India Investment Grid

District Wise Project Distribution

Total Projects: 3566
Project Opportunity: USD 188.6 BN
Government projects: 3025
Private projects: 541
Project Interests Generated: 130
Project Interest Total Amount: USD 40 BN+