



Guidance
INVEST
INNOVATE
CREATE
TamilNadu



Welcome to Tamil Nadu

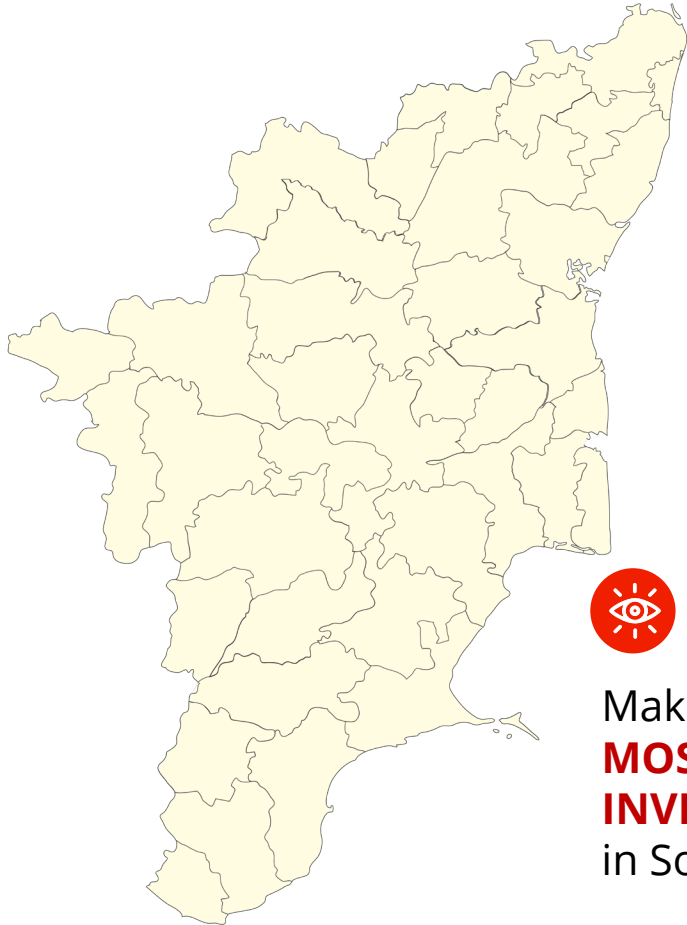
Land of Abundant Opportunity

 <https://investingintamilnadu.com/>

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TamilNadu



Aspiration - 1 trillion GDP economy by 2030



Vision

Make Tamil Nadu as the **MOST PREFERRED INVESTMENT DESTINATION** in South Asia



Goals



Create a **BUSINESS-FRIENDLY** Industrial ecosystem



ATTRACT INVESTMENTS worth INR 23 lakh crore in the next 10 years



Create **EMPLOYMENT** opportunities for 46 lakh people by 2030



Creating **WORLD CLASS** Industrial Infrastructure



UPGRADE existing parks and **CREATE NEW PARKS**

Tamil Nadu at a glance



Economy

Second largest economy in India,
8% of National GDP

Power

As a power surplus state, the state
has an Installed capacity of
30GW

GDP

USD 250 Billion*

at the end of 2018-19
(equivalent to the 46th largest economy in the world)

Area

10th largest state with a **15%**
share of India's coastline

Population

70 million,
6% share of India's population

Urbanisation

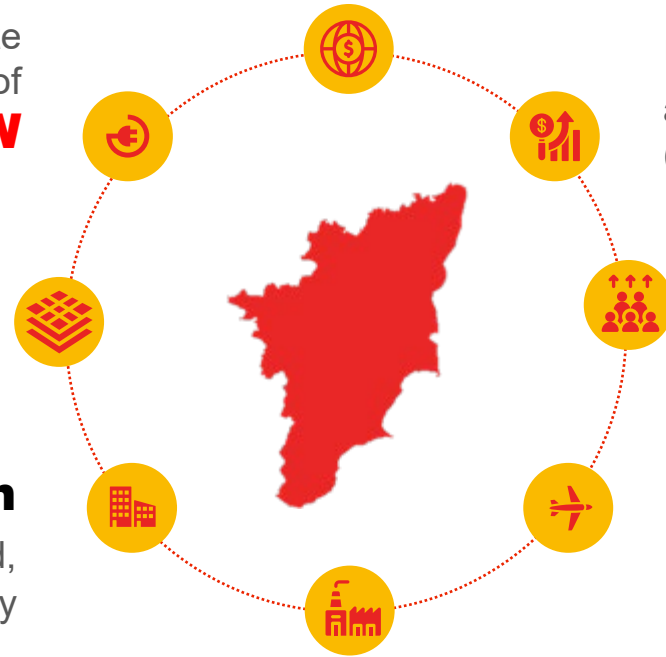
Over **50%** of the state is urbanized,
highest in the country

Connectivity

6 Airports & 22 Sea-ports
in the state

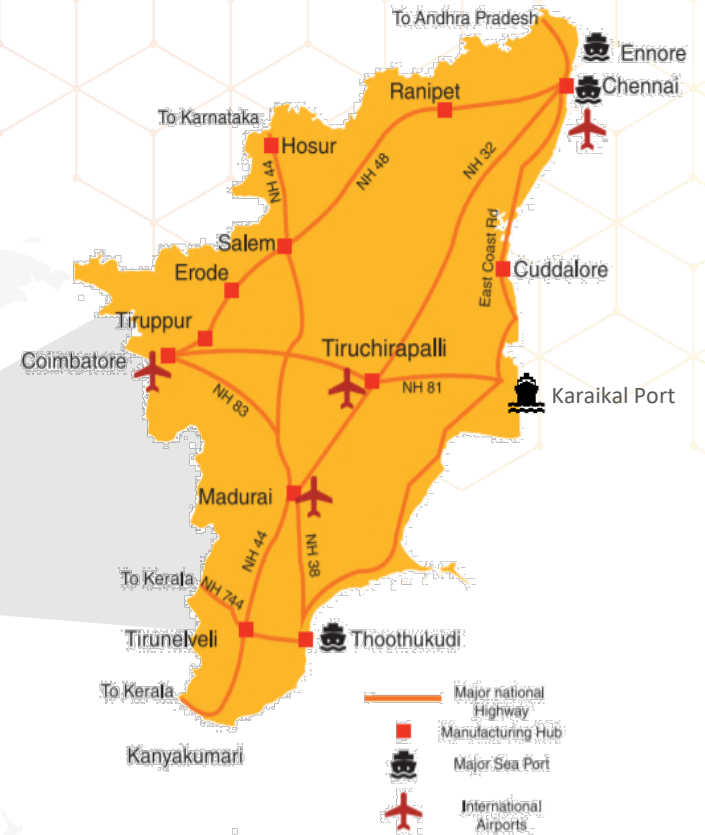
Industrialisation

Highest number of factories in India and
home to **74** of the Fortune **500** companies



*with respect to current prices at 2011-12 base

Tamil Nadu - Infrastructure



Airports

- **4** international & **2** domestic airports in the State
- **2400** weekly flights from & to Tamil Nadu
- **540** international flights & **1850** domestic flights weekly



Seaport

- **5** large ports & **22** other seaports in the State
- **240** million tons per annum is the handling capacity between Chennai, Kamrajar, VOC, Kattupalli & Karaikal ports



Roadways

- **213,096** km of roadways in the state
- **17,000** km of Highways – National & State Highways



Internet Connectivity

- Highest available bandwidth of **14.8** TBps amongst Indian States

Evolution of Sectors in Tamil Nadu

Traditional Sectors

Sectors that have driven manufacturing in the state making it the most industrialized state in India



Automobile & Auto components



General Manufacturing



Textiles & Garmenting



Leather

Emerging Sectors

Sectors that have witnessed considerable interest and investment in the last two years



Electric Vehicle and Auto Electronics



Solar PV & Cell manufacturing



Electronics and Electronic components



Food processing



Data Centres

Focus Sectors

Sectors that are expected to grow in India and contribute towards future industrial development



Semiconductor, fabs & circuit boards



MedTech, Pharmaceuticals & Biotechnology



Aerospace & Defence



Specialty Chemicals



Technical textiles

Tamil Nadu Industrial Policy 2021 Highlights



Vision

Número uno destination to invest, innovate, create products and associated services



Goals

- Achieve annual growth rate of 15% in the manufacturing sector during the 2021-2025
- Attract investments worth INR 10 lakh cr (USD 135 billion) between 2021-2025
- Create employment opportunities for 20 lakh people by 2025
- Increase contribution of manufacturing sector to 30% of GSVA by 2030



Scope

Industrial Units

Sunrise Sectors

R&D Projects

Industrial Park
Developers

Warehousing &
Logistics

FDI Investments
(Relocation projects)



Salient
Features

Transparent &
Flexible

- Decouples artificial pairing of labor-capital, allowing for varied investment-employment combinations
- Empowers investors to choose their structured incentive package model providing higher flexibility

Comprehensive

- Includes manufacturing services such as logistics and R&D as part of its scope
- Encourages development of industrial infra, for e.g.- industrial housing is part of EFA
- Encourages balanced regional industrial development

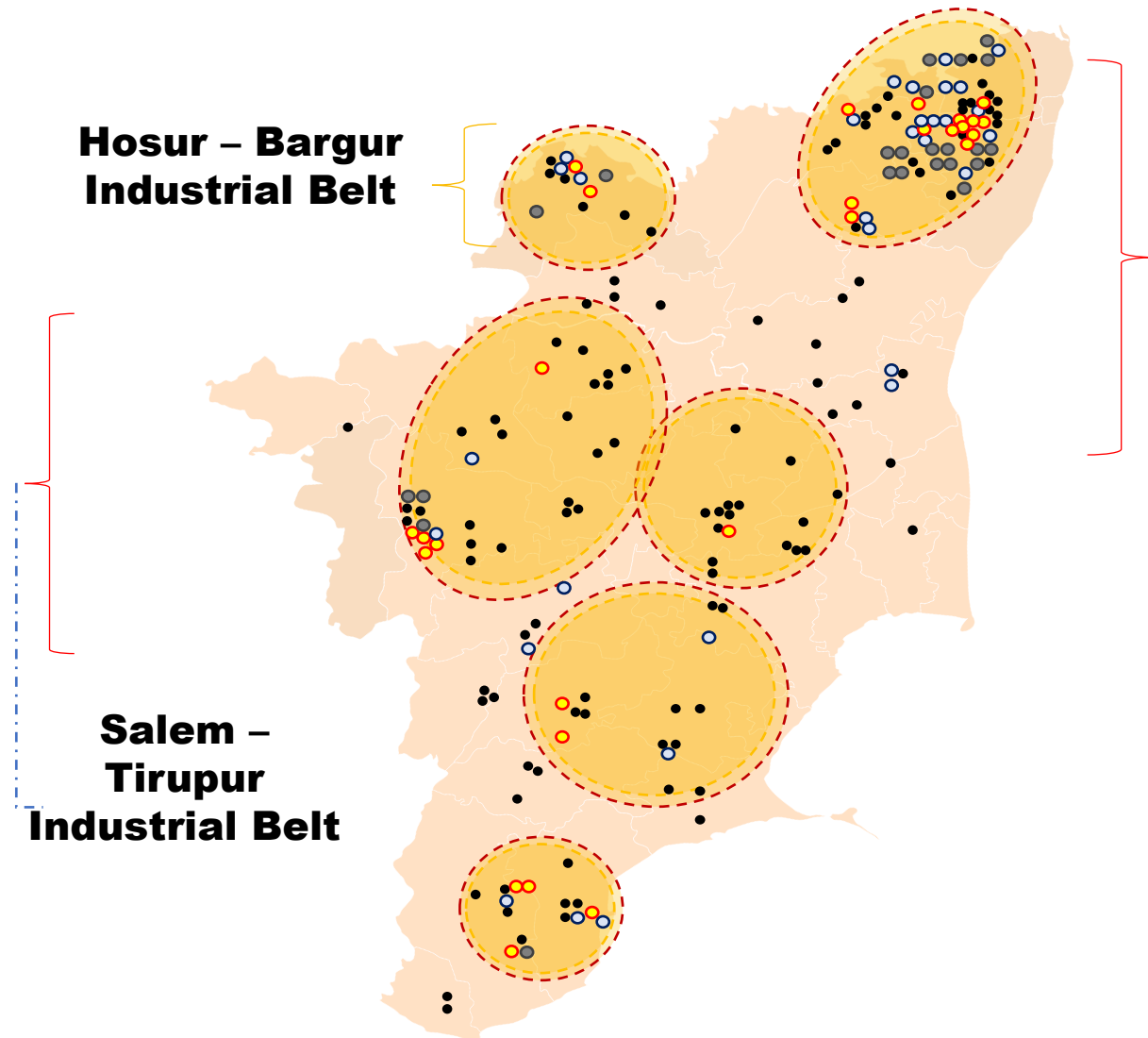
Innovative

- Encourages sunrise sectors with additional incentives
- Encourages R&D projects in the state to cement state's strength as a R&D hub

Inclusive

- Encourages higher participation of women, differently abled and transgenders in the workforce.

Land/ Industrial Parks in Tamil Nadu



Chennai Industrial Clusters- 93		Nos
Govt. Industrial Parks		17
Private Industrial Parks		18
Special Economic Zones		28
SIDCO Parks		30

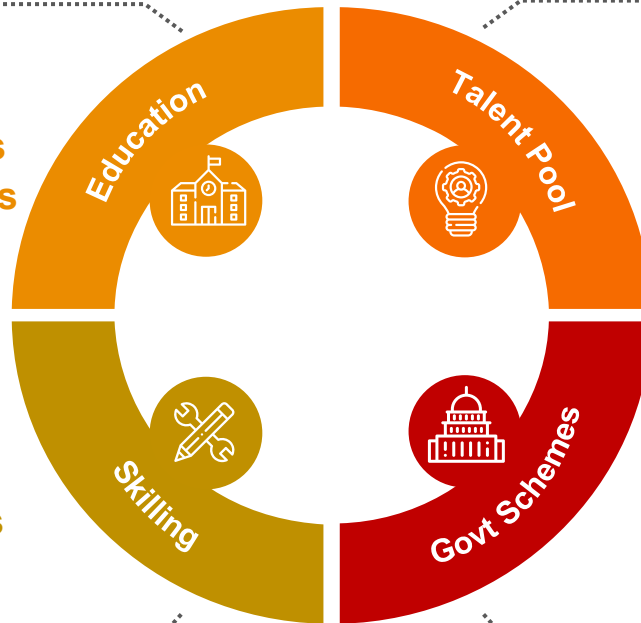
Industrial Parks in and around Chennai				
Name of the park	Location	Acres	Distance from port	Distance from airport (nearest)
One Hub	Kanchipuram District	80	Chennai Port - 57 Km	Chennai Airport - 50 Km
SSM Industrial Park	Tiruvallur	330	Chennai Port - 55 kms	Chennai Airport - 25 Km
Sojitz Motherson Industrial Park	Sriperumbudur	280	Chennai - 75 Kms/Kattupalli - 95 Kms	Chennai Airport - 50 Km
Origins by Mahindra World City	Gummidipundi	230	Chennai - 30 Kms/Kattupalli - 23 Kms	Chennai Airport - 70 Km
MARG Swarnabhoomi	ECR Chennai	612	Chennai Port - 94 Kms	Chennai Airport - 80 Km
Manellore SIPCOT	Manellore	700	Chennai Port - 55 kms	Chennai Airport - 70 Km

A highly skilled & abundant workforce

Tamil Nadu is a renowned education hub & is home to several world class educational institutions

- 54 universities having IT related courses
- 573 engineering colleges
- 501 polytechnic institutes

- ICT academy
- Centres of Excellence in R&D & new technologies
- Assistance for skill enhancement



- ~90,000 yearly engineering graduates in IT related disciplines
- ~120,000 yearly diploma holders

- “Learn while you work” programmes
- Laptop distribution scheme



IIT Madras

Anna University

NIT, Tiruchirappalli

Madras Institute of Technology

Home to 74 of the Fortune 500 companies



Ease of Doing Business Reforms and Related Regulatory Compliances



New Single Window Portal

- **Complete digitization** of G2B interactions for various services / approval
- **200+ services** (spanning across 35 line Department)
- **Contactless, paperless and deemed approval** mechanism



Elimination of Renewal Requirements

- **No requirement for renewals** under Shops and Establishments Act, Legal Metrology Act, and Inter-State Migrant Workmen Act
- **Automated system for renewals** for certain licenses e.g. Trade License already implemented
- State in the process of implementing automated renewal system for Drug Manufacturing / Selling / Storage License, Contractor's License, and Factory License



State & District Business Reform Action Plan 2020

Implementation of:

- **301 reforms** under Business Reform Action Plan 2020
- **45 Services** under the District-level Business Reform Action Plan 2020



Biz Buddy

- Industry Help Desk – Biz Buddy – **Industries can submit their grievances** on issues relating to incentives, clearances, etc. which have not been resolved previously
- Once issue is submitted, the issue is alerted to the nodal officer
- The officer has to **resolve the issue in 30 Days**



Other Initiatives

Planned interventions focused on:

- **Review the need for regulations** pertaining to land, labour, environment, housing and urban development
- **Simplification of the regulatory compliances** through third party certifications/ self-certifications
- Simplification of compliance procedures through business process re-engineering
- Review and study the aspects related to the **Central Inspection System** for the departments

Effective governance system to ensure Ease of Doing Business

Tamil Nadu has a fast track single window clearance mechanism system which ensures the new and the existing investments get clearances in less than 30 days

Our initiatives to promote ease of doing business in the state

Guidance – Nodal Agency

- Investment promotion activities & Single Window Facilitation for Investors in the State

- Grievance Redressal System for Industries within a defined period.
- Online submission & tracking of grievances

Biz Buddy Portal

Ease of Doing Business

Single Window System

- Single point for receiving applications
- Online submission of Documents
- Online query management
- Tracking & Monitoring of Applications.

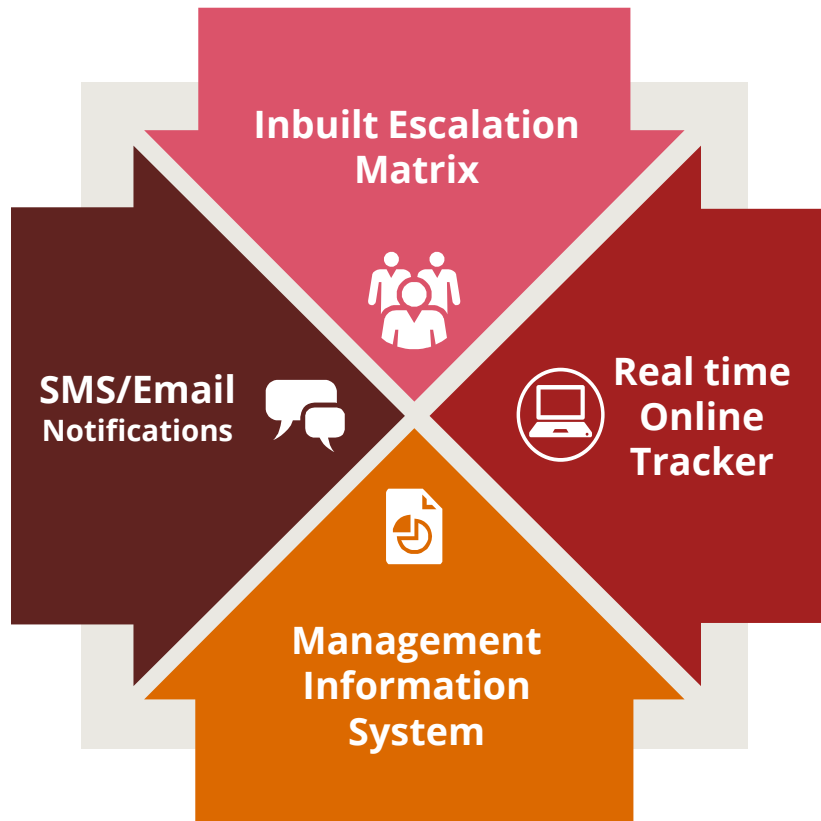
- Online web platform to provide a listing mechanism for private land to be sold for industrial usage.
- Basic due diligence by Govt to facilitate trust amongst buyers.

Land Information Portal

360° Facilitation for Approvals – Single Window System

Obtaining Land	<ul style="list-style-type: none">• For non-MSMEs - State Industries Promotion Corporation of Tamil Nadu identifies, develops and maintains industrial areas• For MSMEs - Small Industries Development Corporation develops industrial estates with infrastructure facilities, provisions work sheds & developed plots
Construction Permits	<ul style="list-style-type: none">• Planning Permission for the Factory Buildings from Chennai Metropolitan Development Authority (CMDA)• Directorate of Town and Country Planning• Building Permit given by Greater Chennai Corporation, Municipal Corporation/ Municipality, Town & Village Panchayat within 14 days
Fire NOC	<ul style="list-style-type: none">• Authority: Fire and Rescue Services Department• Apply on TN Single Window Portal• Processing time is 30 working days
Electrical Inspectorate	<ul style="list-style-type: none">• Approving Authority: up to 630 kVA – Electrical Inspector, above 630 up to 2500 kVA – Senior Electrical Inspector, above 2500 kVA – Chief Electrical Inspector• Apply on TN Single Window• Processing time is 5 working days
Power Connection	<ul style="list-style-type: none">• Authority: Tamil Nadu Generation and Distribution corporation Limited• Apply online for new service connection /addition or reduction of load in respect of LT/ HT service connection
Consent to Establish, Consent to Operate under Air and Water Act	<ul style="list-style-type: none">• Authority: Tamil Nadu Pollution Control Board• Processing time - 30 days for Green, Orange and Red Category industries; 45 days for Red Medium and Red Large Categories
Authorization/ Renewal under Hazardous & Other Waste Rules, 2016	<ul style="list-style-type: none">• Authority: Tamil Nadu Pollution Control Board• Processing time - 45 days for Green, Orange and Red Category industries; 45 days for Red Medium and Red Large Categories
Trade License	<ul style="list-style-type: none">• Greater Chennai Corporation• Municipal Corporation/Municipality• Town Panchayat/ Village Panchayat

Features of Biz Buddy



SMS/Email Notifications

- Automatic SMS/Email Notifications triggered on any Help Call operation – Submission, Assignment, Status Change etc.

Inbuilt Escalation Matrix

- Help Calls are automatically escalated to a higher level if not resolved within a predefined period

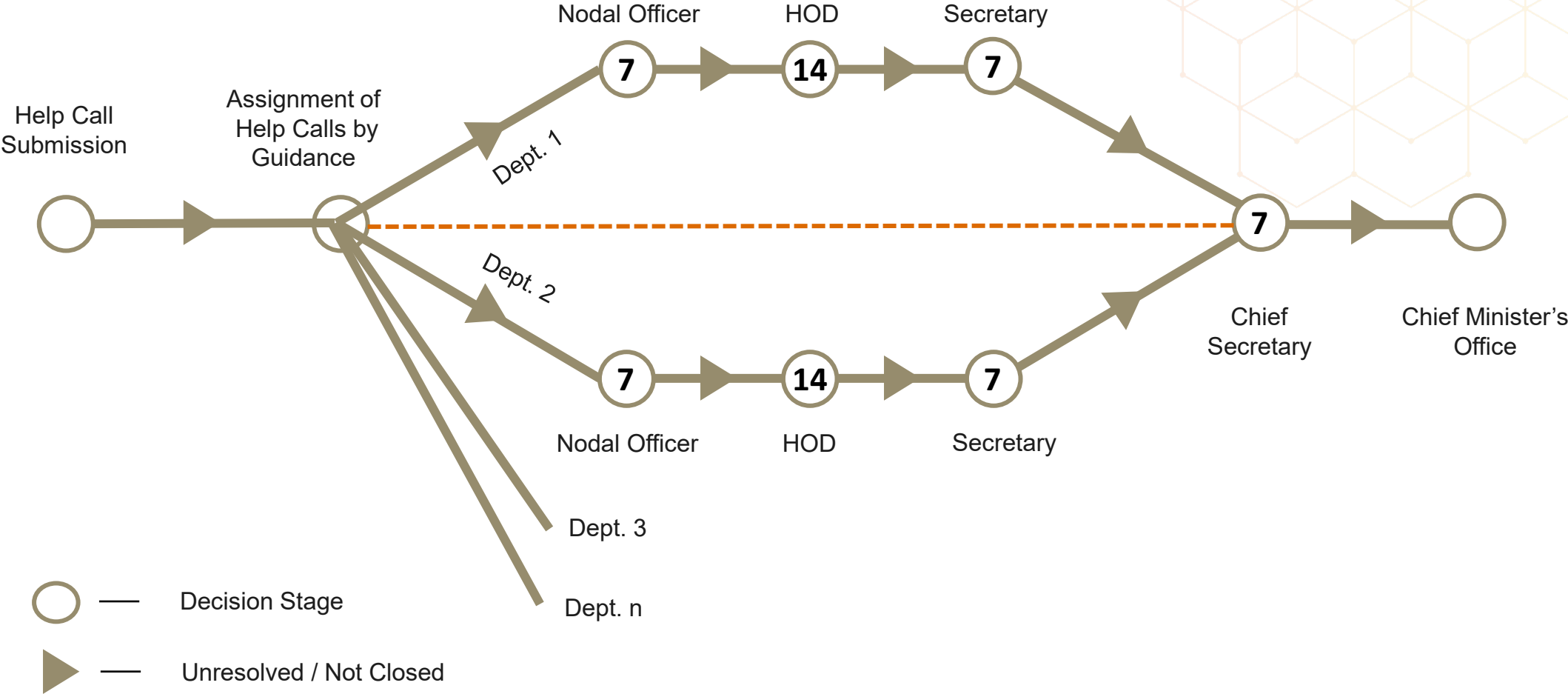
Real Time Online Tracker

- Investors can track their Help Calls online at any time
- Help Call Tracker allows investors to raise/answer queries

Management Information System

- Dynamic dashboards for officers at different hierarchical levels
- Consolidated Help Call reports sent to concerned officials weekly

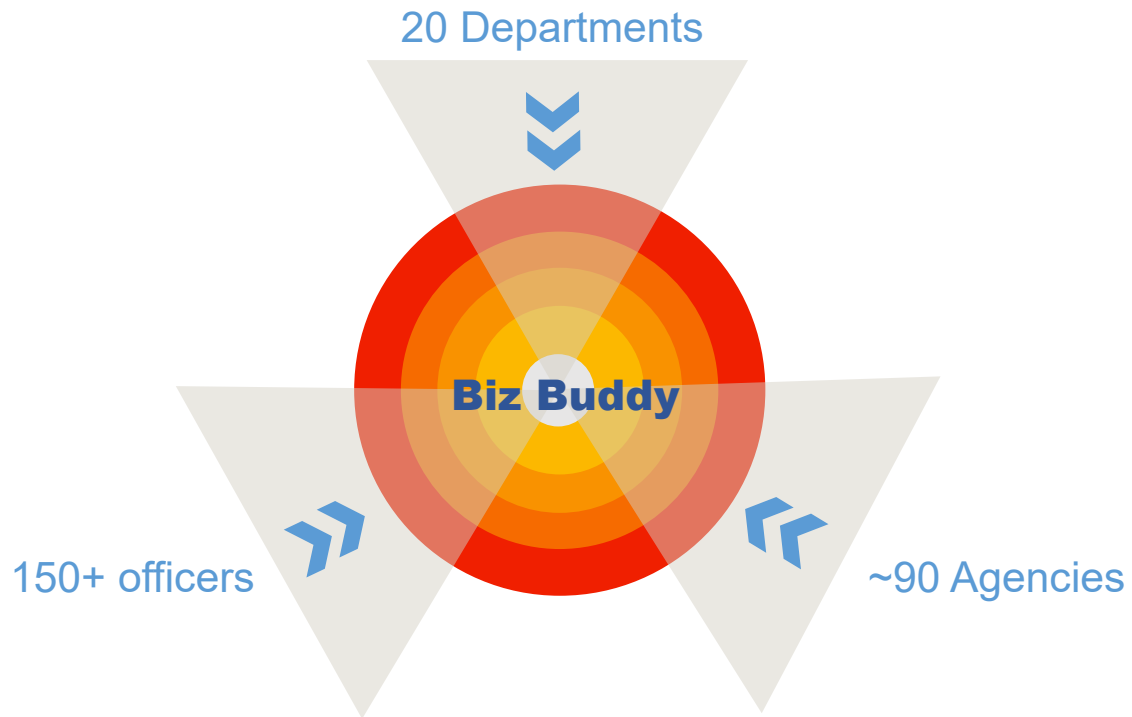
Help Call Life Cycle



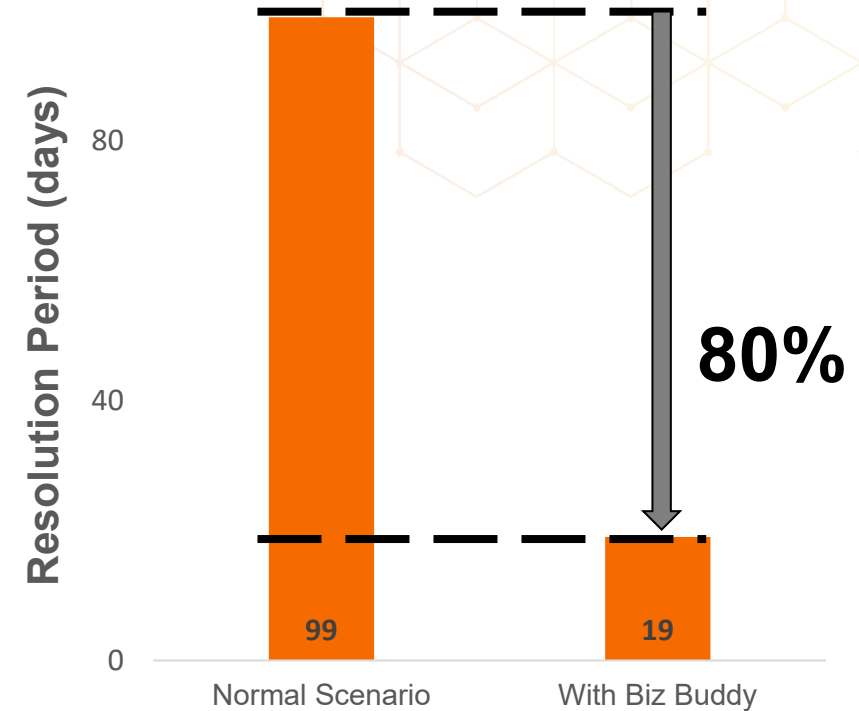
Inbuilt escalation mechanism ensures **Help Calls** are acted upon appropriately & resolved in a time bound manner

Adoption and impact of Biz Buddy on EoDB

20 departments, 48 agencies and 110 officers have been onboarded to the portal

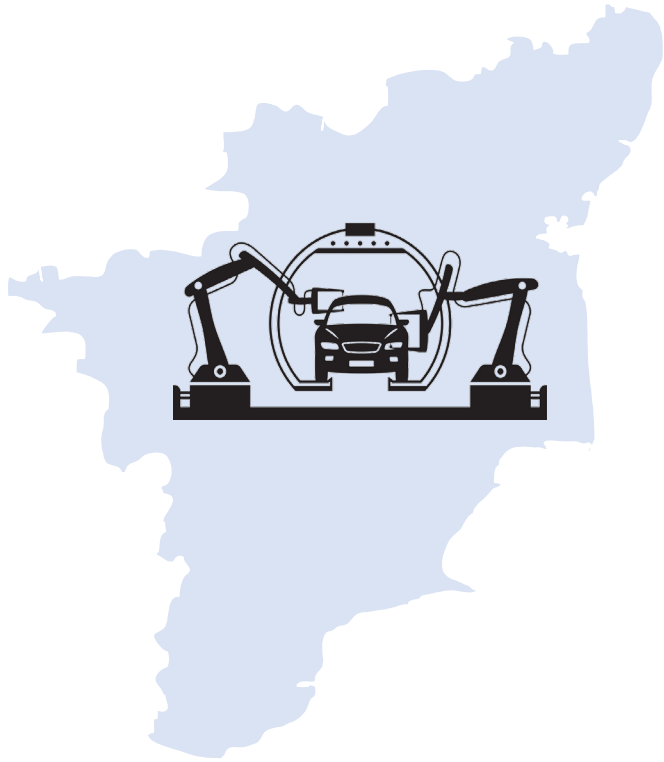


Reduction of 87% in issue resolution time



Biz Buddy is addressing investor issues in a prompt and transparent manner

Automobile & Auto-component Sector



2 million vehicles sold in TN every year
46% of India's car exports
28% of MV/Trailers produced in India
Top 10 Automobile hubs in the world
35% of India's auto component production

Largest contributor to the automobile sector in India in terms of Industrial Output
Installed capacity - **1 car/ 20 seconds** and **1 two-wheeler/6 seconds**

Largest tire manufacturer in the country

Multiple R&D & Testing centers

Major Automotive Companies in Tamil Nadu



DAIMLER



YAMAHA



RENAULT

ROYAL
ENFIELD

Valeo

apollo
TYRES



MRF



ASHOK LEYLAND



EICHER



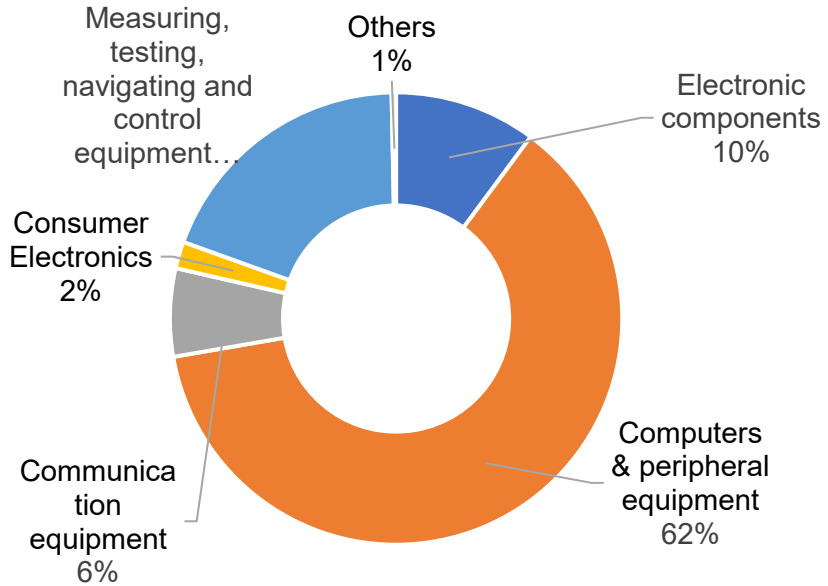
HYUNDAI

NEW
THINKING.
NEW
POSSIBILITIES.

PSA
GROUPE

Electronics & Hardware Sector

Segment-wise share of electronics output in Tamil Nadu in 2015-16 (USD million)



2nd

Rank in Computer, Electronics and Optical Products manufacturing

16%

16% of **National Production**

62%

In share of Computers & Peripheral Equipment in the Total Electronics Output in TN

3rd

In Electronic Exports (USD 1.27 billion) in **FY 2017-18**

Major Electronics and Hardware Companies in Tamil Nadu

FOXCONN



NOKIA

SAMSUNG



FLEXTRONICS

Downstream Industries for Electronics and Hardware Manufacturing



Automotive



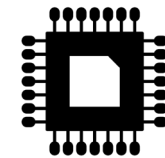
Mobile Phones and Components



Telecom



Consumer Durables

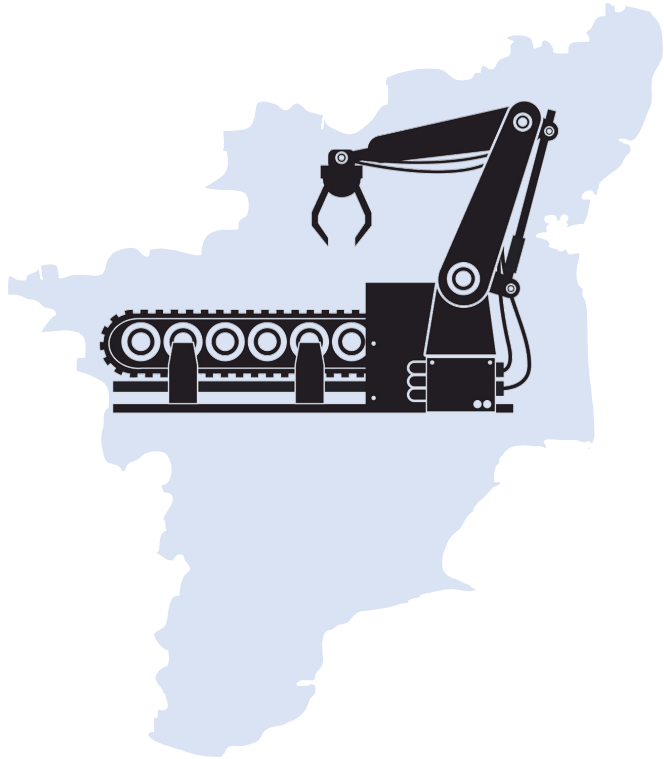


Semiconductor fabrication



Medical Electronics

General Manufacturing Sector



1st

in the number of factories in India with over 37,000 factories operating across the state

2nd

in heavy engineering exports in 2017-18 accounting for USD 2.5 bn export

2nd

general purpose and special purpose machinery production

2.5L

Employed by nearly 3000 large units

28%

Share in exports of IC Engines & Parts

21%

Share in exports from pumps & castings industry

Major Manufacturing Companies in Tamil Nadu



KOMATSU

ALSTOM



TOSHIBA



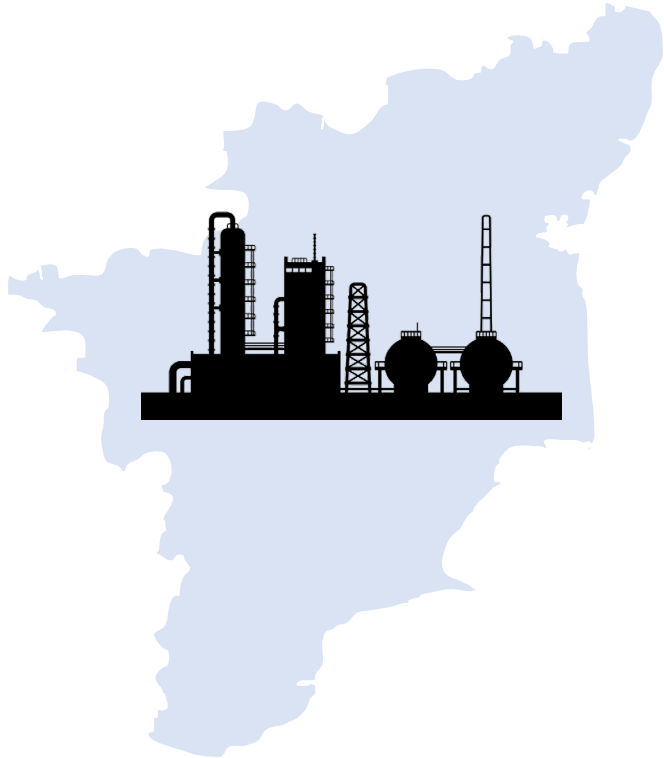
Gamesa



Vestas

TIMKEN
Where You Turn

Chemicals & Petrochemicals Sector



3rd

Accounts for USD 5.65 billion of output in India

6%

Country's total chemicals output

15.3%

Chemicals output grew at a CAGR of 15.3% between 2012-13 and 2015-16

\$2.77B

Leader in South Indian states in plastics production revenue

13.5%

Exports of chemical products grown at CAGR of over 13.5% in the last 5 years

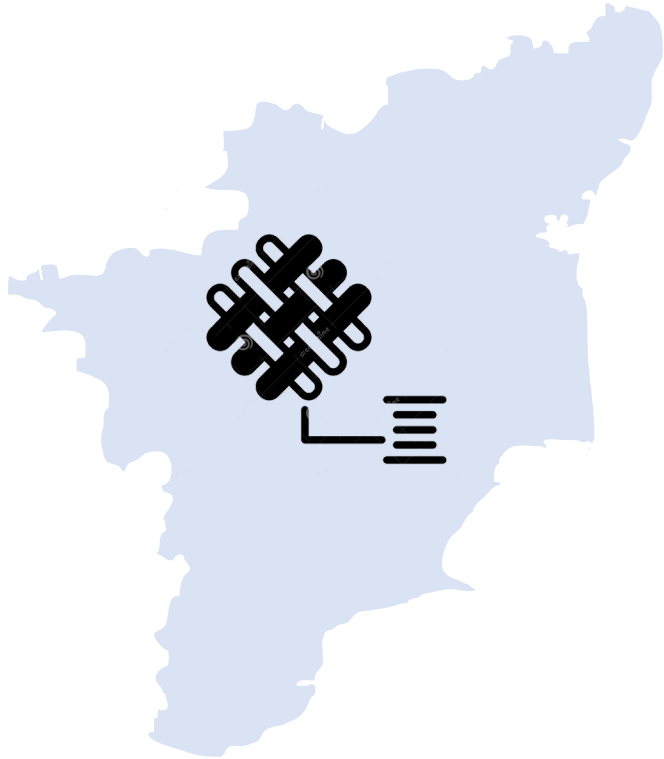
20K

With over **20,000 acres** of land in **Thoothukudi**, the southern district poises itself as a chemical and petrochemical hub with logistic efficiency.

Major Chemical & Petrochemical Companies in Tamil Nadu



Textile & Garmenting Sector



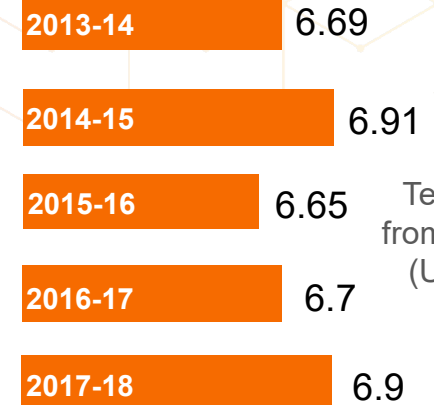
40% of Yarn in India- Yarn Bowl of India
59% of Textile Mills in TN
50% of Garmenting Units in TN

Contributes to 20% of India's total export of readymade garments worth over USD 6.7 billion

Leading producer of technical textiles

Exports at 6-7 billion per annum

Textiles Sector employs 35% of workforce in Tamil Nadu constituting about 28% of total employment in India's textile & garment sector



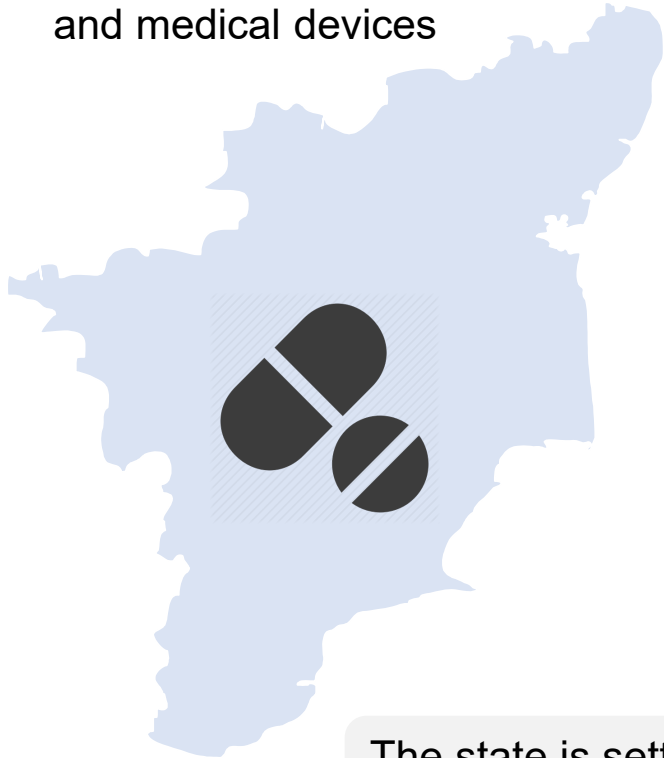
Textile Export from Tamil Nadu (USD billion)

Major Textile Companies in Tamil Nadu



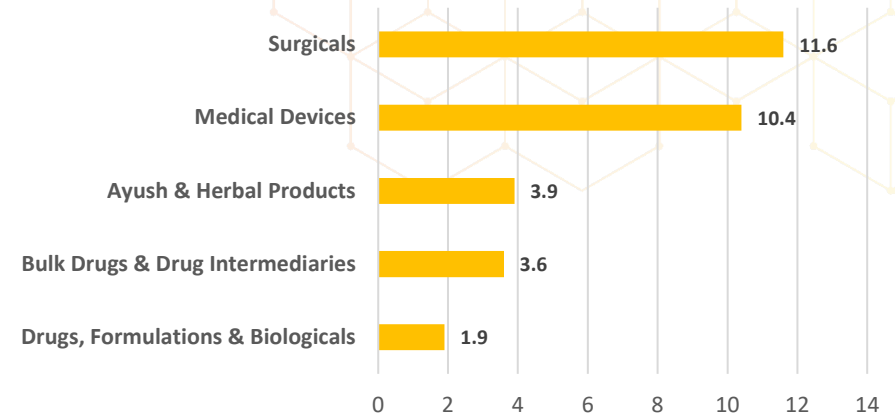
Medical Devices & Pharmaceutical Sector

Tamil Nadu is India's 5th largest pharmaceutical manufacturing state with 400+ companies in bulk drugs, formulations and medical devices



- \$1.1B** State output in 2017-18
- 2.6%** Share of national output in 2017-18
- 4.3%** Share in national employment in the sector
- 80+** Pharma & higher education institutes in the state

Segment Share in National Exports TN ranks Highest in Surgicals sub sector



\$484 million worth of exports from Tamil Nadu in 2018-19

The state is setting up a exclusive 330 acre Medi Park in Chengalpattu (near Chennai) and a Bulk Drug Park near Chennai with state-of-the-art infrastructure and common facilities for R&D.

Our Investors:



Agriculture & Food Processing Sector



Agriculture Sector contributes 11.2% to Tamil Nadu's Economy and sustenance to 40% of the population



Agricultural contribution to Tamil Nadu GDP was USD 28.3 Billion in 2018-19



Tamil Nadu contributes 8.5% to India's Food processing output



4th largest state in food processing units in the country



Agriculture and Food Processing exports from Tamil Nadu was USD 1.9 Billion in 2019-20

Major Food Processing Companies in Tamil Nadu



LOTTE



TAKASAGO

BRITANNIA



HATSUN



aavin

Aachi

SAKTHI
MASALA

Milky
Mist

Aerospace & Defense Sector

Tamil Nadu – the launchpad for manufacturing opportunities



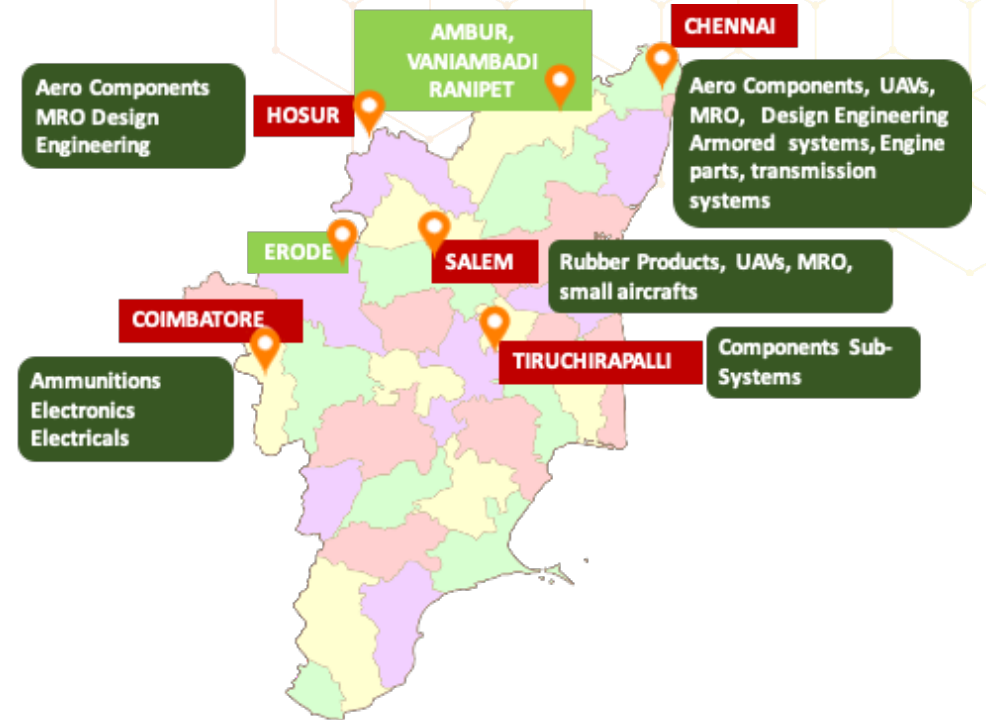
Over 120 aerospace manufacturing companies, with more than 700 suppliers to various defense companies in Tamil Nadu

Well established industrial ecosystem across various nodes of the aerospace and defense corridor

An exclusive park with common infrastructural and advanced testing facilities is being set up near Chennai

Opportunities to invest – MRO in Chennai & Hosur, Precision Manufacturing in Hosur, Small Aircraft Manufacturing in Salem, Missile fabrications in Coimbatore etc.

Attractive incentives package offered by the state via exclusive aerospace and defense policy

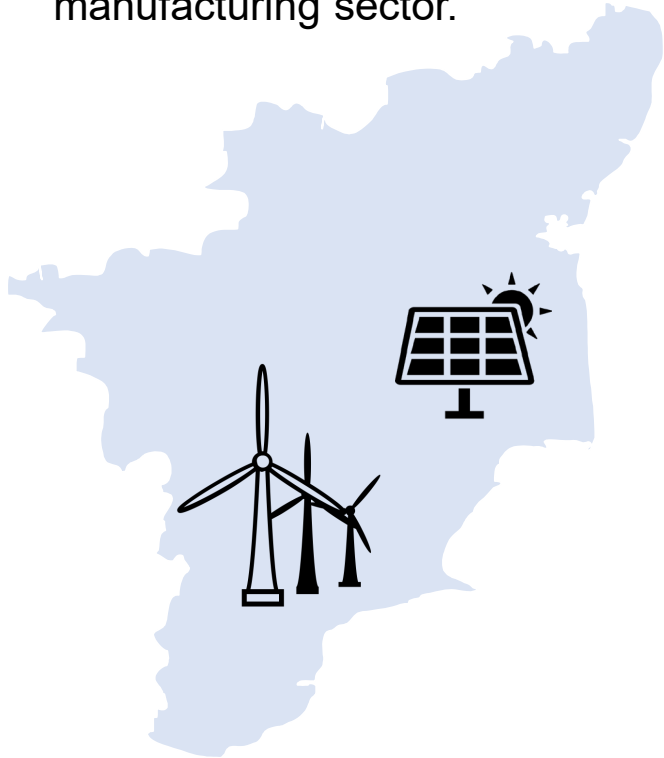


Major Aerospace & Defence Companies in Tamil Nadu



New Target Sectors – Renewable Energy & Manufacturing

Tamil Nadu is one among the 9 global renewable energy destinations & poises itself as the hub for renewable energy manufacturing sector.

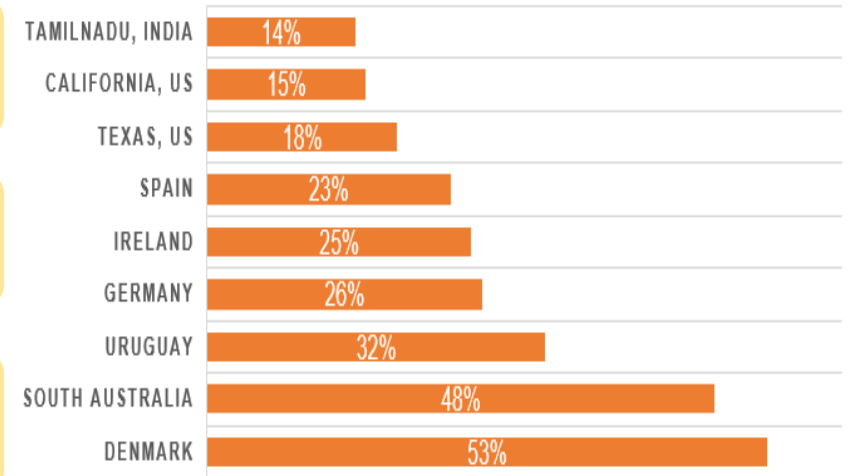


Total installed Renewable Energy capacity of over 14.2 GW

Exports over 1000 Wind Blades to USA

Tamil Nadu generates over 8 GW wind power

The state is identifying an ideal location for setting up a new renewable energy park with access to ports.



Our Investors:





Your Partner in Progress

Nodal agency for investment promotion & single window facilitation