



Aerospace & Defence Sector

Welcome

To

Punjab

PROGRESSIVE
PUNJAB
OPPORTUNITIES UNLIMITED

INVEST
PUNJAB

PUNJAB RANKED

1

in

“Ease of Setting up a Business”

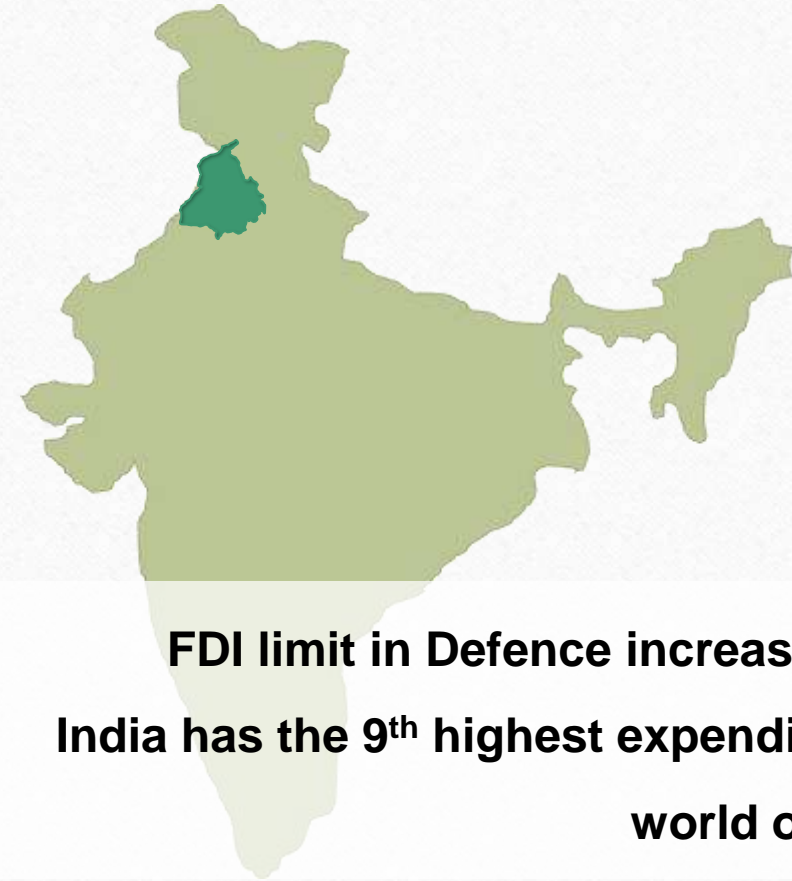
by World Bank

“Remarkably, Punjab is the only State in which the single window system allows application for all of the licenses studied in this assessment,”

Extract from the Assessment of State implementation of Business reforms report | September 2015

INDIA'S GROWTH STORY

- Indian aerospace industry has grown at about 10% in the past 5 years, higher than the global average of about 4%
- Indian civil aviation market is set to become the world's 3rd largest by 2020
- YOY rise of about 13% in commercial passenger traffic from June 2014 to June 2015
- India has the **3rd** largest armed forces in the world
- **₹ 25,000 Cr. (USD 4 Bn)** to be invested by Government of India by 2020-21



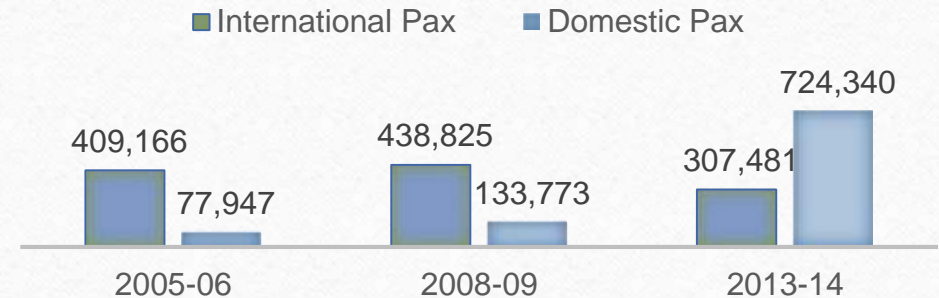
FDI limit in Defence increased to 49%.
India has the 9th highest expenditure in the world on Defence

**UNTAPPED AND GROWING MARKET
FOR AEROSPACE & DEFENCE**

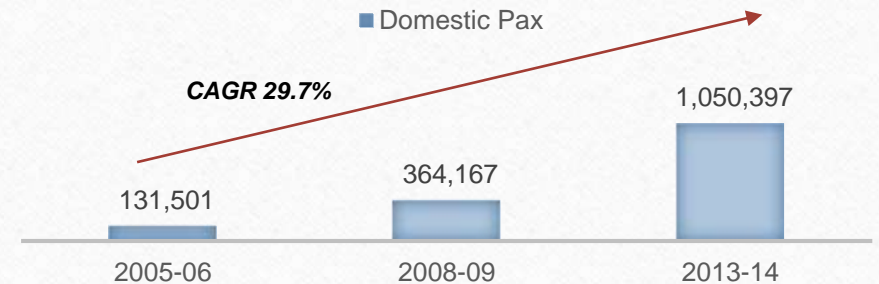
Sector highlights

- Annual growth in passenger traffic is 10%
- New international airport at Chandigarh/Mohali set to further increase the passenger movement in the State
- Domestic Airports in Ludhiana, Bathinda and Pathankot for enhanced connectivity

**PASSENGER MOVEMENT
(AMRITSAR)**



**PASSENGER MOVEMENT
(CHANDIGARH)**



Passengers	Airport	FY 2014-2015	FY 2013-2014	Growth %
Domestic	Amritsar	750,000	724,000	3.5
International	Amritsar	335,000	307,000	8.7
Domestic	Chandigarh	1,206,000	1,050,000	15

ROBUST EXISTING ECOSYSTEM

*Base Repair Depot established by
Indian Air Force in 1962*

Base Repair Depots (BRD) in Chandigarh for repair and maintenance of aircrafts and equipment

Functions: Overhaul of aero-engines/aircraft specific items including various types of fabric for covering wings, fuselage, control surfaces, panels and interiors

Air force stations in Punjab

6 Airforce stations – Chandigarh, Amritsar, Bathinda, Pathankot, Halwara and Adampur

Halwara Airforce station - one of the first air bases built in India after Independence

Adampur Airforce station is one of the largest airforce bases of India

Indian Airforce to open its 2nd **Bhisiana Airforce station** near Bathinda, which will house indigenous Airborne Early Warning and Control Systems (AEW&CS)

*Strong R&D support for advanced
manufacturing*

Central tool room, Ludhiana has been setup in 1980, under bilateral agreement between India and Germany

Courses are certified and accepted by the industry in India and abroad

Services: CNC programming, Rapid prototyping (RP), 3D computer-aided design (CAD) and 3D digitizing systems

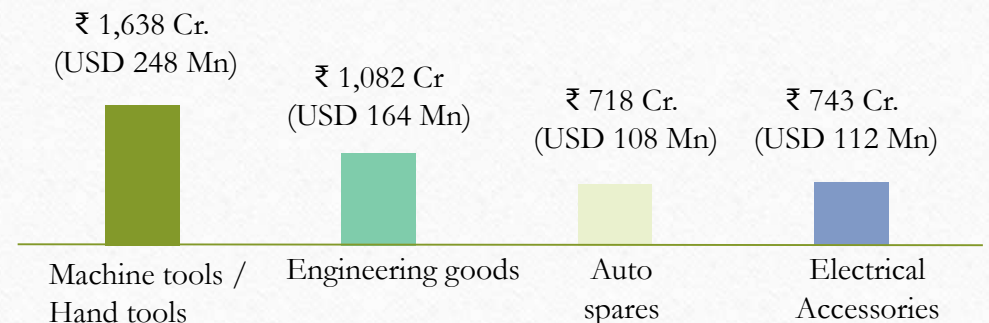
STRONG MSME BASE FOR ENGINEERING

- 1.6 Lac. MSMEs in Punjab
- Tremendous growth in exports seen across segments of light engineering including auto parts, electrical switchgears and accessories and engineering goods (YoY growth: 36.4%)
- Electrical switchgear and accessories segment has grown by 52% in the last 5 years
- Engineering exports contributes 15% of the overall manufacturing exports from Punjab

Advanced manufacturing capabilities

- Progressive Competencies
 - Quality engineering
 - Prototyping
 - Process optimization
- Technical know how of manufacturing defence equipment
 - Bullet proof and riot control vehicles
 - Jackets

Exports 2014-15



INVESTMENT OPPORTUNITIES

Skill Development

- ▶ Training institutes for ground handling and line maintenance work
- ▶ Skill development in automation and precision engineering

- ▶ Common testing centre
- ▶ Repair and maintenance facilities
- ▶ Aircraft parts manufacturing
- ▶ Aviation and Aerospace training institutes

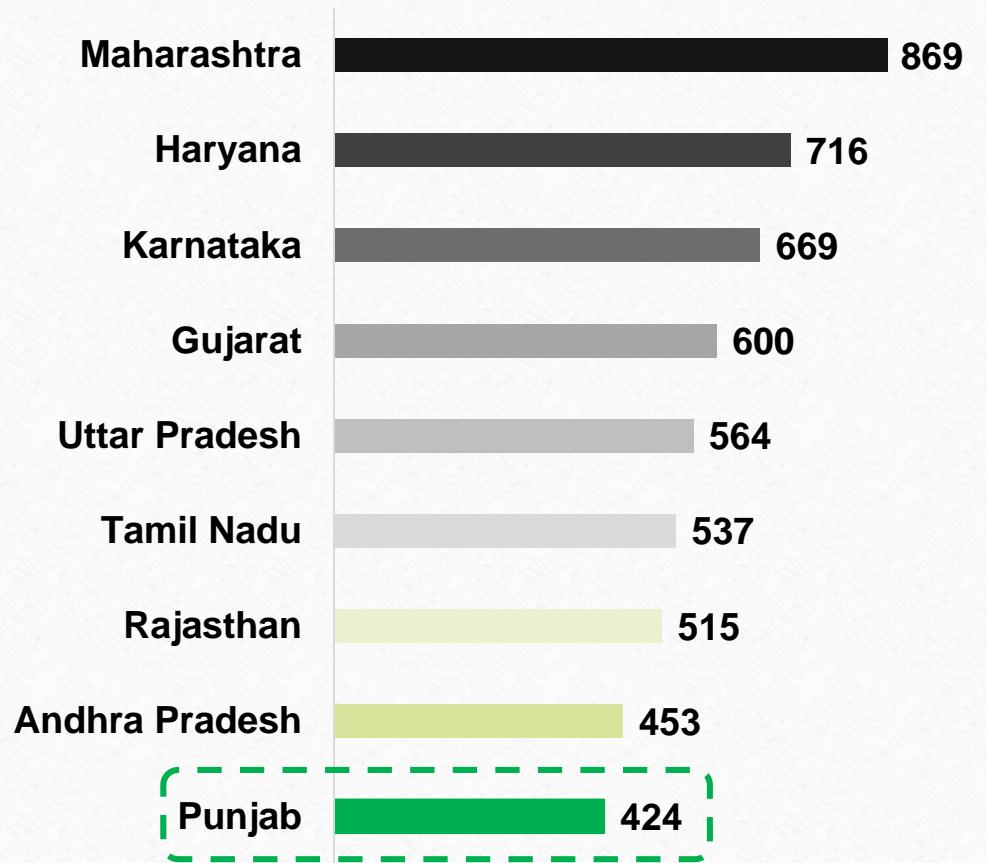
Development of Integrated Aerospace & Defence Park

- ▶ Airlines operating in India get nearly 90% of their MRO done abroad. With the fleet size likely to double by 2020, the need for a strong domestic MRO industry is critical

MRO Hub at Mohali

- ▶ No major MRO in northern India – Hyderabad, Mumbai, Bangalore and an upcoming MRO in Nagpur
- ▶ Punjab is strategically located to cater the growing air traffic movement of States including Himachal Pradesh, Jammu & Kashmir, Delhi, Haryana
- ▶ Potential to develop repair and maintenance warehouses in Aerospace and Defence park

Punjab Aerospace & Defence Sector



Cost per man-day worked

Most competitive labour rates in the country; about **25%** **lower** than the national average

One Stop Office



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NOW



**FOR ALL
INVESTMENTS**

Thank You
WELCOME TO

