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- Punjab: Defining Excellence in Agriculture
- Advantage Punjab
- Opportunities in Agri & Food Processing
INDIA SCENARIO

Agriculture at a Glance

Food Processing Sector at a Glance

Food & Beverages is the 5th largest industry in manufacturing GVA of Food Processing Sector – USD 28.02 bn (INR 2.08 lakh crore) (2017-18)

CAGR 9.8% for past 5 yrs (Source : MoFPI)

FDI in Food Processing Sector

2019-20 : 904.7 Mn US$
2018-19 : 628.2 Mn US$

All major segments growing more than double the global average (5%)

Contribution to GVA ~17.8% USD 276 bn (INR 19.48 lakh Cr.) (2017-18) - (Source IBEF)

Employment > 50 % of the total work force

India is among World Leaders in production of Milk, Pulses, Jute, Fruits, Vegetables, Rice, Wheat & Spices

Contribution to total exports: 12.66% (2017-18)

Green Revolution led by Punjab has not only made India self sufficient in Agri production, but also a world leader in various commodities
## Snapshot of Agri & Food Processing Sector

### Agriculture at a Glance

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### Food Processing Sector at a Glance

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- FDI in Food Processing Sector
  - 2019-20: 904.7 Mn US$
  - 2018-19: 628.2 Mn US$
- GVA of Food Processing Sector – USD 28.02 bn (INR 2.08 lakh crore) (2017-18)
- CAGR 9.8% for past 5 yrs (Source: MoFPI)
- All major segments growing more than double the global average (5%)
- Green Revolution led by Punjab has not only made India self sufficient in Agri production, but also a world leader in various commodities

Sources: IBEF-Indian Food Industry; DPIT – FDI Report; MOFPI; KPMG Analysis
Agri and Food Processing Sector: On to a Glorious Future

By 2030, India would become 3rd largest consumer market after US and China

India's Food Retail market is expected to touch USD 827 billion (INR 58 lakh crore) by 2023, up from USD 487 billion (INR 34 lakh crore) billion in 2017

By 2024, the Food Processing Industry will potentially attract USD 33 billion (INR 2.3 lakh crore) investments and generate employment for 9 million people

Key trends

- Increasing Per Capita Income and resultant change in lifestyle has led to substantial growth in demand for processed food
- Fast expanding Retail and e-Commerce sector increasing demand
- Expected growth from Tier 2 & 3 cities
- India is witnessing a shift towards convenient, ready to eat and functional foods
- With increasing health concerns and consciousness, consumers are increasingly opting for healthy ingredients like organic foods, healthy snacks, and juices etc
- Traceability: an increasingly important aspect in trade
- Surge in demand for fruits and vegetables
- Contract farming increasing becoming popular

1 USD = INR 70

*ASSOCHAM-TechSci Research consulting study on ‘Food Value Chain: Partnerships in India’.
*ASSOCHAM and Grant Thornton report on “Food processing sector-Challenges & growth enablers”
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PUNJAB: DEFINING EXCELLENCE IN AGRICULTURE

Key Statistics
- Area: 5.04 Million ha
- Net Sown Area: 4.13 Million ha (82% of State's area, highest in India)
- Irrigated Area: 4.12 Million ha (99.9% of the net sown area)
- Cropping intensity: 204% (highest in India)
- Contribution to Central Pool:
  - Wheat: 37.8% of India’s total pool
  - Rice: 25.8% of India’s total pool

Sources: CMIE, Punjab Economic Survey 2018-19, MoFPI annual report, NDDB

Food Bowl of India
- Leader in production of several agri & food commodities
- 1st in wheat yield (5188 Kg/ha)
- 3rd in Honey production in the country
- Among the largest producers of Peach, Pear, Kinnow, Muskmelon, Peas and Radish
- 1st in Rice yield (4132 Kg/ha)
- 1st in per capita milk availability in the country
- 2nd in Wheat & Rice production

Strong dairy industry network

With only 1.5% of India’s area, Punjab is a leading producer of several agro & food commodities

Punjab: Agri & Food Processing Sector at a Glance
- Share of Agri & Food Processing sector in manufacturing is 21% against India’s 8.8%
- Key Commodities: Wheat, Rice, Fruits & Vegetables, Dairy

One of the best food processing infrastructure in the country

Strong Government support - Thrust Sector with best in class incentives

Significant industry presence of key Marquee Brands

Significant opportunities: Milk Processing, Vegetables and Fruits processing, Rice, Cereal processing, Meat Processing

First State to introduce Traceability in Seed Potato
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Punjab: Defining Excellence in Agriculture

With only 1.5% of India's area, Punjab is a leading producer of several agro & food commodities

**Key Statistics**

<table>
<thead>
<tr>
<th>Description</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Area</td>
<td>5.04 Million ha</td>
</tr>
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<td>Net Sown Area</td>
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</tr>
<tr>
<td>Contribution to Central Pool</td>
<td>Percentage of India's total pool (highest in India- contributing to India's food security)</td>
</tr>
<tr>
<td>Wheat</td>
<td>37.8%</td>
</tr>
<tr>
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<td>25.8%</td>
</tr>
</tbody>
</table>

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Leader in production of several agri & food commodities

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- 1st in Rice yield (4132 Kg/ ha)
- 1st in per capita milk availability in the country
- 2nd in Wheat & Rice production
- 3rd in Honey production in the country
- Among the largest producers of Peach, Pear, Kinnow, Muskmelon, Peas and Radish
- Strong dairy industry network

Sources: CMIE, Punjab Economic Survey 2018-19, MoFPI annual report, NDDB
Punjab: Granary of India

- **Punjab Wheat Yield: Outperforming the world**

  Punjab yield higher than global yield by 44% and Indian yield by 58%

<table>
<thead>
<tr>
<th>Cereal</th>
<th>Production (Million tonnes)</th>
<th>Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wheat</td>
<td>18.3 &lt; 35% India's pool</td>
<td>2nd</td>
</tr>
<tr>
<td>Rice</td>
<td>12.8 25% of India's pool</td>
<td>2nd</td>
</tr>
</tbody>
</table>

  *2017-18

  **Wheat Yield (Kg/ha)**

  - China: 5629
  - Punjab: 5077*
  - Europe: 4266
  - Canada: 3350
  - India: 3533
  - Russia: 2701
  - USA: 3474


- **Presence of top players**

Front Runner in Dairy

Highest per capita milk availability in the country: 1120 gms/day, Three times the national average

Key Statistics

- **6th** Largest Milk producer in India
- **34.5 Million litres** Daily Production
- **7%** Share of milk production in India with just ~ 2.5% of Bovine Population*
- **75%** Share of Unorganized Sector (Huge opportunity for milk processing)

Major Commodities

Milk, Butter, Ghee, Curd, Cheese, UHT milk, Infant Food, Dairy Whitener, Chocolate etc.

Presence of top players

Horticulture: High Value Vanguard of Agriculture

With just 4.6% of the net sown area, Horticulture contributes about 12.4% to the agriculture GDP of the state

- Ranked 2nd in Mandarin Orange (Kinnow), accounting for 24% of total production of India
- Ranked 3rd in Honey, accounting for 15% of total production & 21% of total honey exports from India
- Leader in producer of Peach with 29.2% share in the country
- Vegetables: Cabbage, Carrot, Cauliflower, Onion, Peas, Potato
- 600+ cold storages across the state

Ample availability of Horticulture Produce for Processing

<table>
<thead>
<tr>
<th>Crop</th>
<th>Total Production</th>
<th>State's consumption</th>
<th>Market Surplus</th>
<th>Possible type of Processing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kinnow</td>
<td>1247</td>
<td>250</td>
<td>997</td>
<td>Juice</td>
</tr>
<tr>
<td>Guava</td>
<td>206</td>
<td>170</td>
<td>36</td>
<td>Juice/Candy</td>
</tr>
<tr>
<td>Pear</td>
<td>74</td>
<td>15</td>
<td>59</td>
<td>Jam/Murabah</td>
</tr>
<tr>
<td>Potato</td>
<td>2716</td>
<td>1000</td>
<td>1716</td>
<td>Chips/Flour</td>
</tr>
<tr>
<td>Peas</td>
<td>405</td>
<td>100</td>
<td>305</td>
<td>Frozen</td>
</tr>
<tr>
<td>Tomato</td>
<td>253</td>
<td>160</td>
<td>93</td>
<td>Ketchup/Puree</td>
</tr>
</tbody>
</table>

Available for processing (All figures in '000 tonnes)

Punjab Offers high yielding Horticulture crops

- Litchi has the highest productivity with 16.3 MT/Ha against National Average of 7MT/Ha
- Punjab is Ranked 2nd in productivity of Guava with 22.56 MT/Ha
- Punjab is ranked 3rd in the country for pear and accounts for 25% production in country with 23MT/Ha

Agri Exports Scenario

- Punjab's total exports of APEDA Products (2018-19): USD 520 million (INR 3640 crore)
- Shares in India's Food Export: 2.8%
- Share of Agri Export in total merchandise exports from Punjab: 14.9%

Country wise exports (USD million)

<table>
<thead>
<tr>
<th>Country</th>
<th>USD Million</th>
</tr>
</thead>
<tbody>
<tr>
<td>SAUDI ARABIA</td>
<td>105</td>
</tr>
<tr>
<td>USA</td>
<td>46</td>
</tr>
<tr>
<td>UAE</td>
<td>36</td>
</tr>
<tr>
<td>UK</td>
<td>36</td>
</tr>
<tr>
<td>PAKISTAN</td>
<td>33</td>
</tr>
<tr>
<td>QATAR</td>
<td>24</td>
</tr>
<tr>
<td>OMAN</td>
<td>22</td>
</tr>
<tr>
<td>IRAQ</td>
<td>20</td>
</tr>
<tr>
<td>KUWAIT</td>
<td>18</td>
</tr>
</tbody>
</table>

Exports by Commodity (USD million)

- Basmati Rice (336)
- Other Cereals (14)
- Other Products (35)
- Fruits & Vegetables Seeds (16)
- Buffalo Meat (21)
- Natural Honey (23)
- Alcoholic Beverages (27)
- Cereal Preparations (48)

Source: APEDA
Indian Institute of Maize Research, Ludhiana - IIMR is the only institute of the country exclusively mandated for maize research.

Guru Angad Dev Veterinary and Animal Sciences University (GADVASU), Ludhiana - provides consultancy and specialist services to livestock owners, government and allied agencies through continuous research.

### Name of the Research Centre

- **PAU (Ludhiana)**

- **Fruit Research Station, Bahadurgarh (Patiala)**
  - Guava, Ber, Sapota

- **Dr MS Randhawa Fruit Research Station Gangian (Hoshiarpur)**
  - Mango, Citrus, Litchi

- **Regional Research Station for Kandi Area Ballowal Sahkhi (Shaheed Bhagat Singh Nagar)**
  - Chickpea, Taramira, Rainfed Wheat, Water Management Under Rainfed Conditions

- **Fruit Research Station Jallowal-Lesriwal (Hoshiarpur)**
  - Nursery Production, Citrus

### Extensive Sector Infrastructure - Production, Storage and Marketing

- **162** WAREHOUSES & STORAGE
  - Total Storage capacity 6.3 MMT.

- **600+** COLD STORAGE
  - Across the state

- **3** MEGA FOOD PARKS
  - Ludhiana, Fazilka and Kapurthala

- **3** AGRI-PROCESSING CLUSTERS
  - Jalandhar, Sri Mukatsar Sahib, Firozepur

### Agri Extension services through a network of Krishi Vigyan Kendras & Farm Advisory Service Centres

- **Centers of Excellence**
  - Vegetables - Jalandhar (Partner: Israel)
  - Potatoes - Jalandhar (Partner: Netherlands)
  - Citrus - Hoshiarpur (Partner: Israel)
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**Mega Food Parks:**

**High Quality Food Processing Infrastructure**

<table>
<thead>
<tr>
<th>Food Park</th>
<th>Location</th>
<th>Area (acres)</th>
<th>Current Major Players</th>
</tr>
</thead>
<tbody>
<tr>
<td>Punjab Agro Industry Corporation Mega Food Park</td>
<td>Ladhowal, Ludhiana</td>
<td>100</td>
<td>Del Monte, Godrej Tyson Foods Ltd., Meat Masters, Iscon Balaji Food Pvt. Ltd</td>
</tr>
<tr>
<td>Sukhjit Mega Food Park</td>
<td>Phagwara, Kapurthala</td>
<td>55</td>
<td>Sukhjit Starch &amp; Chemicals Ltd.</td>
</tr>
<tr>
<td>International Mega Food Park</td>
<td>Fazilka</td>
<td>55</td>
<td>Schreiber Dynamix Dairies Pvt. Ltd., Perennial Food</td>
</tr>
</tbody>
</table>

**Key facilities at Mega Food Parks**

- Common effluent treatment plant
- Cold storage facilities
- Fully developed plots
- Contemporary plug & play sheds
- Bulk material handling equipments

**Units at Mega Food Parks are also eligible for incentives under Sampada Yojana of Government of India**

Source: MoFPI
Key Clusters

<table>
<thead>
<tr>
<th>COMMODITY</th>
<th>CLUSTER</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rice Milling</td>
<td>Amritsar, Ludhiana, Patiala, Sangrur, Batala, Ferozepur, Kapurthala</td>
</tr>
<tr>
<td>Fruits &amp; Vegetables</td>
<td>Amritsar, Jalandhar, Ludhiana, Patiala, Rupnagar, Sangrur</td>
</tr>
<tr>
<td>Processing</td>
<td></td>
</tr>
<tr>
<td>Milk Processing</td>
<td>Ludhiana, Jalandhar, Moga, Patiala, Sangrur, Fatehgarh Sahib</td>
</tr>
<tr>
<td>Potato Processing</td>
<td>Fatehgarh Sahib, Hoshiarpur, Jalandhar, Ludhiana, Sangrur</td>
</tr>
<tr>
<td>Meat Processing</td>
<td>SAS Nagar, Barnala, Jalandhar</td>
</tr>
<tr>
<td>Kinnow/ Orange/</td>
<td>Fazilka, Hoshiarpur</td>
</tr>
<tr>
<td>Sweet lemon</td>
<td></td>
</tr>
<tr>
<td>Snacks Processing</td>
<td>Moga, Patiala, Sangrur, Kapurtala and Ludhiana</td>
</tr>
<tr>
<td>Fisheries</td>
<td>Muktsar, Ferozepur, Mansa, Fazilka, Faridkot</td>
</tr>
</tbody>
</table>

Source: Ministry of Food Processing Industries, Govt. Punjab Economic Survey 2018-19
Promoting Organic Farming in the State

Government providing institutional support to Organic farmers

Over 13,500 acre with 3,100 farmers brought under certified Organic production, 8,000 acres of area under Registration, state witnessing farmers shift to organic production

PROCUREMENT

Procurement of Organic produce after three years of Organic Certification at remunerative prices

VALUE ADDITION/ PROCESSING

Processing (Organic Wheat, Organic Basmati Paddy) at Certified Organic Units, Packaging and marketing under the brand name “FIVE RIVERS”.

MARKETING

Specialized Organic Marts (Organic Hut) promoted at various National and International Exhibitions
Dedicated Agri Export Strategy

TARGET
Increase state's contribution in India's agri and allied products from INR 14,000 crore in 2017-18 to INR 21,000 crore by 2022-23 and to INR 32,000 by FY 2027-28.

SALIENT ASPECTS

- Focus commodities with export potential identified. 
  Key commodities: Fruits and Vegetables, Meat, Seed Potato, Milk Products etc
- 57 export clusters across 7 product categories identified
- Cluster facilitation cum monitoring cell to be set up under the Chairmanship of Managing Director, Punjab Agri Export Corporation (PAGREXCO)
- Some of the interventions identified include
  - Capacity Building of farmers, Good Agricultural Practices (GAP) training
  - Market Intelligence Cell for Export Facilitation & setting up standards for each commodity
  - Setting up of processing facilities- SMP, F&V, RTE products, buffalo meat etc
  - GI tag for citrus
  - Development of traceability systems for Seed potato, organic product, Basmati rice, citrus
  - Setting up of NABL labs
  - Setting up of freight facilities
  - Setting of refrigeration houses, pack houses etc
ADVANTAGE PUNJAB
Punjab: Strategically Located & Well Connected

Proximity to National Capital
NEW DELHI
150 Miles
4 Hrs
55 Min

Connected to Freight Corridor for easy movement of goods
Connected to all major metro cities
Robust Connectivity

- 100% Road Connectivity
- All Major Towns Connected with 4/6 Lane Highways
- Road Density 2 times higher than National Average
- 2nd highest Rail Density in India

Flights Available from Amritsar & Mohali
- Sharjah (4 hrs)
- London (9 hrs)
- Tashkent (2.5 hrs)
- Dubai (4 hrs)
- Birmingham (9 hrs)
- Doha (4.5 hrs)
- Kuala Lumpur (6 hrs)
- Singapore (6 hrs)

4 Domestic Airports
Jalandhar, Ludhiana, Bathinda, Pathankot

Coming Soon International Airport @ Ludhiana

Dedicated Freight Corridors
(Eastern & Western)

Max Speed
46 to 62 Miles/Hr

Load Capacity Per Train
5300 to 13000 tonnes

Reduction in Freight Cost
By 33%

Ranked Best in India on Safety & Security of Cargo Movement

Adani Logistics Ltd.
Hind Terminal Pvt. Ltd. (Sharaf Group, UAE)
Punjab Logistics Infrastructure Ltd (PLIL)

Multimodal Logistics Parks, Ludhiana

5 ICDs
- Amritsar
- Jalandhar
- Ludhiana
- Bathinda
- Derabassi

Source: LEADS Index 2019, Government of India
Ranked 2nd in Ease of Logistics in India

LAND & RAILWAY PORT
Amritsar

5 ICDs
- Amritsar
- Jalandhar
- Ludhiana
- Bathinda
- Derabassi

MULTIMODAL LOGISTICS PARKS,
Ludhiana
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Source: LEADS Index 2019, Government of India

DEDICATED FREIGHT CORRIDORS
[Eastern & Western]
(Intersection Point – Dadri)

- Max Speed
  46 to 62 Miles/Hr

- Load Capacity Per Train
  5300 to 13000 tonnes

- Reduction in Freight Cost
  By 33%

Source: LEADS Index 2019, Government of India
Attractive Fiscal Incentives

Agri and Food Processing is categorized as a Thrust Sector and is eligible for attractive incentives.

- **FISCAL INCENTIVES FOR THRUST SECTOR UNITS**
  - Net GST Reimbursement for 10 years up to 125% FCI
  - 100% Exemption from Electricity Duty for 10 yrs
  - 100% Exemption/Reimbursement from Stamp Duty
  - 100% Exemption from CLU/EDC charges
  - 100% Exemption from Property Tax for 10 yrs
  - Exemption of Market Fee, Rural Development fee and other State taxes and fees on raw material for food processing industries

- **ADDITIONAL FISCAL INCENTIVES FOR ANCHOR UNITS**
  - Net GST Reimbursement for 15 years up to 200% of FCI
  - Employment Generation Subsidy of up to INR 48,000 per employee per year for 5 years
  - 100% Exemption from Electricity Duty for 15 years

- **MSMEs entitled for Additional Benefits**

- **Additional incentives for food processing Industry under PLI scheme of GoI**

*Anchor unit- Minimum FCI of INR 50 Cr. or Minimum direct employment of 500 persons*
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---

**Ease of Doing Business - Punjab Bureau of Investment Promotion**

Ranked as one of the best IPA in the Country

- **UNIFIED REGULATOR (23 Departments)**
- **INVESTMENT PROMOTION AGENCY**
- **DEDICATED RELATIONSHIP OFFICER**
- **DIGITAL APPROVALS**

- **INVESTMENT PROMOTION**
- **FISCAL INCENTIVE APPROVALS**

---

**ONE STOP OFFICE**

ADVANCED SINGLE WINDOW SYSTEM
ONE OF ITS KIND IN INDIA

---

**REGULATORY CLEARANCES**

**INVESTMENT FACILITATION**

---

**LEVEL**

- **STATE**
- **DISTRICT**

**AUTHORITY**

- **CEO, PBIP**
- **DC**

**UNITS**

- **LARGE**
- **MSME UNITS**

---

*Anchor unit- Minimum FCI of INR 50 Cr. or Minimum direct employment of 500 persons

**Additional incentives for food processing Industry under PLI scheme of GoI**
Peaceful & Competitive Labour

PEACEFUL
No Lockouts
No Strikes
Flexibility In Hiring

FRIENDLY
State
Ranks 3rd
on
Interstate
Migrant
Policy Index
2019

WAGES
Competitive
Wages per month
INR 8,777
(unskilled)
INR 9,557
(semi-skilled)
INR 10,454 (Skilled)
INR 11,486
(highly skilled)

REFORMS
24x7
Shifts
Allowed
Across
Genders

No disruptions in working environment

Quality Power at Low Cost

ABUNDANT
Power Surplus
Installed Capacity
13,432 MW

LOW COST
Power
@ ₹ 5.00*
per unit
(* Variable cost)

QUALITY
T&D Losses
14.11 %
National Average 22 %

No shortage even during peak demand

Month-wise power supply position of Punjab 2017-18
(in terms of peak demand & availability)
Skilled Human Capital

<table>
<thead>
<tr>
<th>Number of Undergraduate colleges</th>
<th>462</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Krishi Vigyan Kendra</td>
<td>22</td>
</tr>
<tr>
<td>Number of Engineering, Technology and Architecture colleges</td>
<td>103</td>
</tr>
<tr>
<td>Number of Polytechnic institutions</td>
<td>136</td>
</tr>
</tbody>
</table>

Home to one of the best agricultural universities in the country Punjab Agricultural University (PAU)

| Number of research papers in Agriculture and related areas | 1015 |
| Number of Ph.Ds every year in Agriculture or related areas | 128 |
| Number of International MoUs | 16 |

Human Resource (2018-19)

International Collaborations & MOU
University of Sydney, Australia | Canadian Food Inspection Agency, Canada
University of Saskatchewan, Canada | Royal Veterinary College, London, UK
University of Guleph, Ontario, Canada | Polar Genetics, Alberta, Canada

Research Excellence
Economical Animal Feed e.g. Paddy Straw Pellet | Zoonotic Disease Research
Animal Reproduction & Fertility Management | Surgical Interventions

Other Leading Institutions
Indian Institute of Maize Research, Ludhiana
Borlaug Institute for South Asia, Ludhiana
Indian Institute of Technology, Ropar
National Agri-Food Biotechnology Institute, Mohali

Business Incubation Centres
- Food Industry Business Incubation Centre, PAU Ludhiana
- Food Processing Training & Incubation Centre, RRS, Bathinda
Safest Place to do Business

Rate of Cognizable Crimes (2017)

<table>
<thead>
<tr>
<th>State</th>
<th>Percentage Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>Haryana</td>
<td>802.9</td>
</tr>
<tr>
<td>Tamil Nadu</td>
<td>602.6</td>
</tr>
<tr>
<td>Gujarat</td>
<td>525</td>
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<tr>
<td>Madhya Pradesh</td>
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<tr>
<td>Maharashtra</td>
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<tr>
<td>Telangana</td>
<td>358.7</td>
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<tr>
<td>Chhattisgarh</td>
<td>344.3</td>
</tr>
<tr>
<td>Rajasthan</td>
<td>330.7</td>
</tr>
<tr>
<td>Karnataka</td>
<td>291.7</td>
</tr>
<tr>
<td>Andhra Pradesh</td>
<td>283.9</td>
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<tr>
<td>Uttar Pradesh</td>
<td>269.6</td>
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<tr>
<td>Odisha</td>
<td>242</td>
</tr>
<tr>
<td>Punjab</td>
<td>239.9</td>
</tr>
</tbody>
</table>

*Source: As per NCRB 2017

Percentage Share of State for Cognizable Crime in India

<table>
<thead>
<tr>
<th>State</th>
<th>Percentage Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>Uttar Pradesh</td>
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<tr>
<td>Maharashtra</td>
<td>9.3</td>
</tr>
<tr>
<td>Tamil Nadu</td>
<td>8.4</td>
</tr>
<tr>
<td>Madhya Pradesh</td>
<td>7.6</td>
</tr>
<tr>
<td>Gujarat</td>
<td>6.7</td>
</tr>
<tr>
<td>Rajasthan</td>
<td>4.9</td>
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<tr>
<td>Bihar</td>
<td>4.7</td>
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<tr>
<td>Haryana</td>
<td>4.5</td>
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<tr>
<td>West Bengal</td>
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<tr>
<td>Karnataka</td>
<td>3.7</td>
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<tr>
<td>Andhra Pradesh</td>
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</tr>
<tr>
<td>Telangana</td>
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</tr>
<tr>
<td>Odisha</td>
<td>2.1</td>
</tr>
<tr>
<td>Chhattisgarh</td>
<td>1.8</td>
</tr>
<tr>
<td>Punjab</td>
<td>1.4</td>
</tr>
</tbody>
</table>

Recorded Lowest Share of Cognizable Crime amongst major industrialized states of India
<table>
<thead>
<tr>
<th>State</th>
<th>Percentage Share of State for Cognizable Crime in India</th>
</tr>
</thead>
<tbody>
<tr>
<td>Punjab</td>
<td>1.4</td>
</tr>
<tr>
<td>Odisha</td>
<td>1.8</td>
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<tr>
<td>Uttar Pradesh</td>
<td>2.1</td>
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<tr>
<td>Andhra Pradesh</td>
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<tr>
<td>Karnataka</td>
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<td>9.3</td>
</tr>
<tr>
<td>Rajasthan</td>
<td>12.3</td>
</tr>
</tbody>
</table>

*Source: As per NCRB 2017*
OPPORTUNITIES ACROSS VALUE CHAIN

**Production**
- Production of Organic food
- Agricultural biotech & micro irrigation techniques
- Machinery & Equipment Manufacturing
- High Quality and Pest Resistant Seed Production
- Cattle Feed and Poultry Feed
- Agritech and Precision Agriculture
- Adulteration Detection Techniques
- Develop Traceability System - Organic, Basmati Rice, Citrus

**OPPORTUNITIES IN AGRI & FOOD PROCESSING**

- Value Added Dairy Products
- Fruit Juice Concentrate Manufacturing – Mandarin (Kinnow), Guava, Litchi, Mango.
- Potato Processing
- Food Packaging
- Processing of Fruits and Vegetables such as Citrus, Pear, Guava etc
- Setting up of Processing units for Buffalo Meat, Pork, Poultry and Goat Meat
- Processing Equipments
- Technologies for Shelf Life Enhancements
- Perishable Cargo Handling Capacities
- Cold Storages (Temperature Controlled)
- Reefer Technology
- Refrigerated Transport Solutions
- Modern Pack Houses
- New Veterinary Technology, Cattle Diagnostics Services etc.
- Setting up of Processing Clusters
- Setting up of NABL Accredited Labs
- Setting up of Smart Warehouses and Supply Chain
OPPORTUNITIES

Plethora of Opportunities Across Value Chain

Production
- Production of Organic food
- Agricultural biotech & micro irrigation techniques
- Machinery & Equipment Manufacturing
- High Quality and Pest Resistant Seed Production
- Cattle Feed and Poultry Feed
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Processing
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- Processing Equipments
- Technologies for Shelf Life Enhancements

Infrastructure & Logistics
- Perishable Cargo Handling Capacities
- Cold Storages (Temperature Controlled)
- Reefer Technology
- Refrigerated Transport Solutions
- Modern Pack Houses
- Agri-cargo Handling, Mechanized Grain Handling & Storage
- New Veterinary Technology, Cattle Diagnostics Services etc.
- Setting up of Processing Clusters
- Setting up of NABL Accredited Labs
- Setting up of Smart Warehouses and Supply Chain
## Identified Commodities and Clusters with Export Potential

<table>
<thead>
<tr>
<th>PRODUCT</th>
<th>DISTRICT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maize</td>
<td>Hoshiarpur, Fatehgarh Sahib, Ropar</td>
</tr>
<tr>
<td>Seed Potato</td>
<td>Gurdaspur, SBS Nagar, Moga, Jalandhar, Hoshiarpur, Kapurthala, Nawanshehar</td>
</tr>
<tr>
<td>Citrus</td>
<td>Abohar/Fazilka, Sri Muktsar Sahib, Bathinda, Mansa</td>
</tr>
<tr>
<td>Pear</td>
<td>Tarn Taran, Amritsar, Jalandhar, Hoshiarpur</td>
</tr>
<tr>
<td>Chili &amp; other vegetables</td>
<td>Ferozepur, Tarn Taran, Patiala, Jalandhar, Amritsar, Hoshiarpur, Sangrur</td>
</tr>
<tr>
<td>Animal Products</td>
<td>Ludhiana, Mohali, Patiala, Fatehgarh Sahib, Ropar, Sangrur</td>
</tr>
<tr>
<td>Honey</td>
<td>Ludhiana, Bathinda, Fazilka, Sangrur, Patiala, Sri Muktsar Sahib, Moga, Hoshiarpur, Roop Nagar</td>
</tr>
<tr>
<td>Floriculture and Flower Seeds</td>
<td>Patiala, Sangrur, Ludhiana, Jalandhar, Amritsar</td>
</tr>
<tr>
<td>Cotton</td>
<td>Fazilka, Bathinda, Mansa, Muktsar</td>
</tr>
<tr>
<td>Celery</td>
<td>Amritsar, Gurdaspur, Hoshiarpur</td>
</tr>
<tr>
<td>Basmati</td>
<td>Amritsar, Tarn Taran, Gurdaspur, Patiala, Fatehgarh, Jalandhar</td>
</tr>
</tbody>
</table>
**Investors Voice**

**Integrated Food Park**
Kapurthala

"Our experience in executing this project has been extremely positive, all approvals have happened in a time bound fashion. **Approach of the Bureau has been one of finding a solution to any problem that comes in the way.**"

---

**Mr. Inigo Anton**
Managing Director
CN IFFCO

"Project site selection was a decisive factor for CN IFFCO & Invest Punjab played a major role in that. It was not only a good portfolio of incentives and schemes for the Investor, but also support extended to us by Invest Punjab since inception that is praise worthy."

---
Investors Voice

Varun Beverages Limited
Pathankot

“Ease of doing business & single window clearance system for all the regulatory approvals is one of the best services offered by PBIP. PBIP understands, evaluates and provides investor friendly response in a corporate style which eventually helps Investor in charting out future course for growth and success.”

Mr. Ravi Kant Jaipuria
Chairman,
Varun Beverages Limited

Cargill
Cattle Feed Plant
Bathinda

“Achyuth Iyengar
Then - MD, Cargill Feed & Nutrition, India

“The Invest Punjab team facilitated in the most professional manner to finalize our project which goes a long way in enabling us to continue to strengthen the existing relationships with livestock farmers in the state.”
### Key Partners in Growth

![Brand Logos]

### Recent Key Investments in the Sector

<table>
<thead>
<tr>
<th>Investor</th>
<th>Investment (in INR Cr.)</th>
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</thead>
<tbody>
<tr>
<td>ITC</td>
<td>1280</td>
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<tr>
<td>Varun Beverages Limited (Pepsico)</td>
<td>800</td>
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<tr>
<td>Verka</td>
<td>708</td>
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<tr>
<td>CN IFFCO PVT LTD</td>
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<tr>
<td>Ludhiana Beverages Pvt Ltd. (Coca Cola)</td>
<td>220</td>
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<tr>
<td>Sukhjit Starch and Chemicals Ltd</td>
<td>152</td>
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<tr>
<td>Frigerio Conserva Allana Private Limited</td>
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<td>Abis Export</td>
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<td>Field Fresh</td>
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<tr>
<td>Cargill India</td>
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<tr>
<td>Pepsico India Holdings Pvt Ltd.</td>
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<tr>
<td>Godrej Tyson Foods Ltd</td>
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<tr>
<td>Iscon Balaji Food Pvt. Ltd.</td>
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</tbody>
</table>

*Though all efforts have been made to ensure the accuracy and currency of the content of this collateral the Government of Punjab (along with the Knowledge Partner) does not assume any legal liability, whether direct or indirect or responsibility for the accuracy, completeness or usefulness of this information.*