



# Indicative Maps

# Rajasthan has built industrial infrastructure with relatively higher concentration on eastern part

Presence of Clusters & Special parks





# Rajasthan has an established textile base but low share of apparel segment & absence of large players has hindered the state from realising its full potential

## Key highlights

Sector contribution to state GDP- Rs 4351 Cr\*

5.4% share of GVA in India's textile sector

19% contribution to state's exports

Fast growing Textile segment (14.8%)

1.3 million persons employed

Largest producer of suiting fabrics

Largest producer of PV suiting

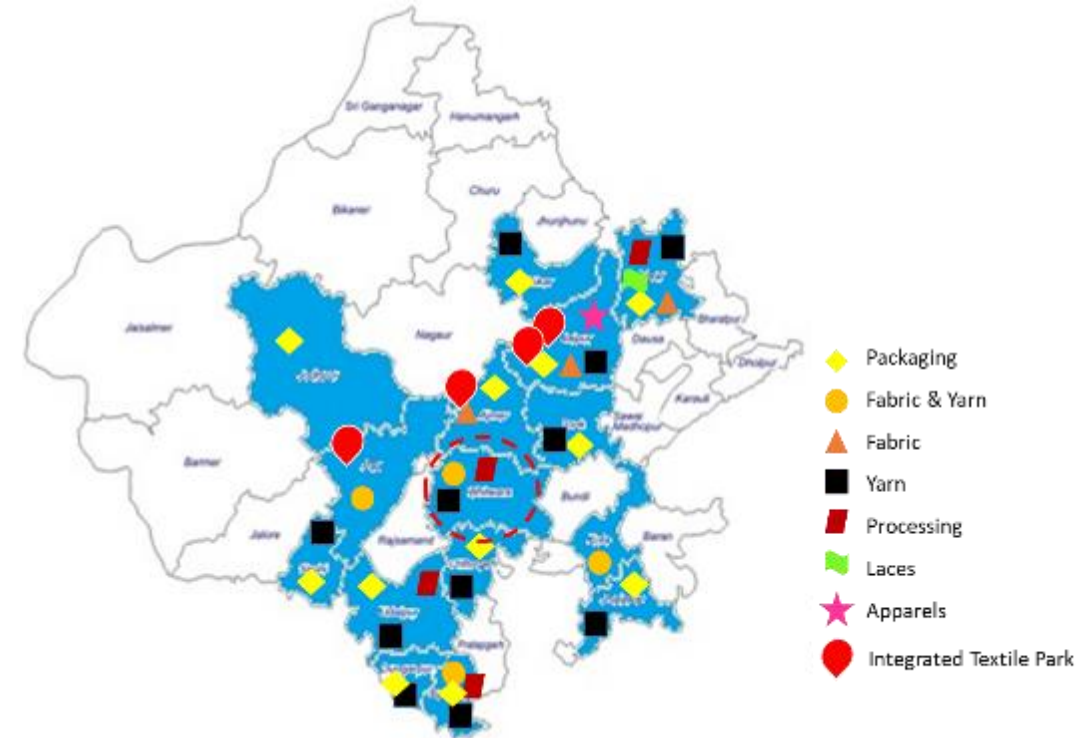
5<sup>th</sup> largest producer of cotton

## Leading Players



\* Source: Annual Survey of Industries

## Textile sector presence across the value chain

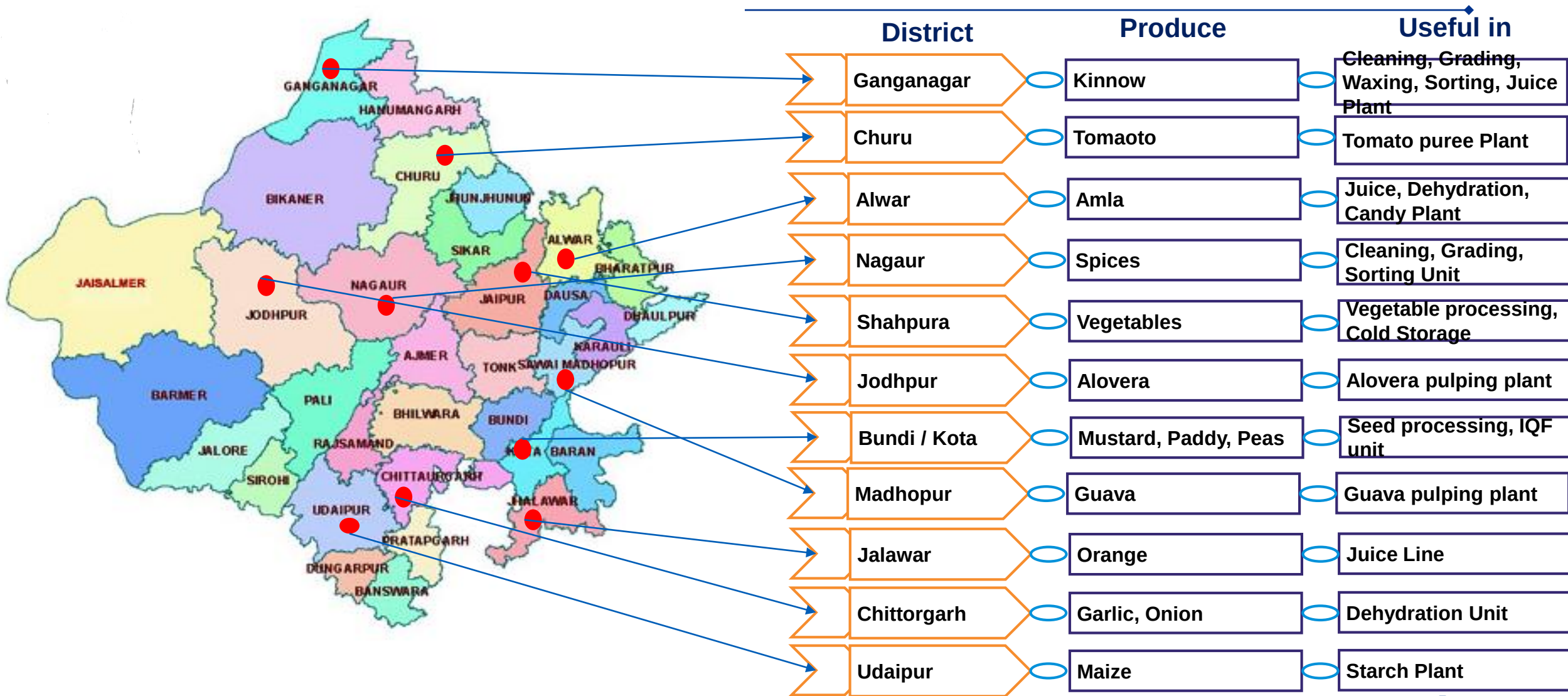


# Food processing





# The established food processing base of Rajasthan gives it a unique platform to meet the growing Industry needs





# Automobile



← Sector Plans



# Rajasthan auto industry has grown across the value chain driven majorly by Japanese auto manufacturers

Access to 57% of the total automobile sales in India

Presence of over 100 component manufacturing units

India's first Special Japanese Industrial Zone in Rajasthan at Neemrana

Rajasthan produces almost all components that go into an automobile

Upcoming petrochemicals sector and raw material presence

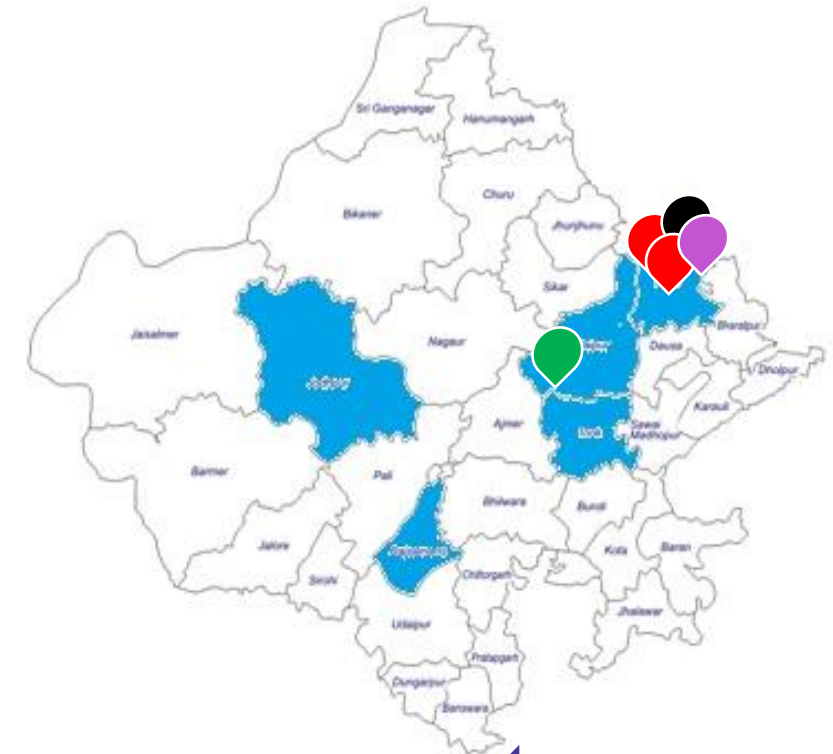
Presence across value chain

1 major auto manufacturing zone operational

Leading source of raw materials for electric vehicle and its components

## Strong base of Manufacturers and OEM

|                                                                                                                            |                                                                                                                            |                                                                                                                              |                                                                                                     |                                                                                                        |
|----------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------|
| <br><b>HONDA</b>                           | <br><b>ASHOK LEYLAND</b>                  | <br><b>Continental Engines Ltd.</b>         | <br><b>IKUNI</b>  | <b>Bestex</b>                                                                                          |
| <br><b>EICHER</b>                          | <br><b>JCB</b>                            | <br><b>SHRIRAM PISTONS &amp; RINGS LTD.</b> | <br><b>TAKATA</b> | <br><b>HONDA</b>    |
| <br><b>SUNBEAM AUTO PVT. LTD.</b>          | <br><b>POLARIS</b>                        | <br><b>BOSCH</b><br>Invented for life       | <b>TOYOTA GOSEI</b>                                                                                 | <br><b>Hero</b>     |
| <b>LOROM</b>                                                                                                               | <br><b>caparo</b><br>Partners in Growth | <br><b>TOYOTA KIRLOSKAR MOTOR</b>         | <br><b>TAFE</b> | <b>TPR AUTO PARTS</b>                                                                                  |
| <br><b>FEDERAL MOGUL</b><br>GOETZE INDIA | <br><b>nbc</b><br>flexible solutions    | <br><b>Mahindra</b>                       | <b>AMTEK</b>                                                                                        | <br><b>NISSIN</b> |



Sector Plans

7

1 sectors

2 Infra

3 Skill

4 Regulatory

5. Promotion

Automotive

# Petroleum & Petro Chemical Sector



Sector Plans



# Petrochemical Sector in Rajasthan

Project Cost – Rs.43,129 crore

Target Mechanical Completion – 4 years

Refining Capacity 9 MMTPA

Equity share of HPCL – 74%, GOR – 26%

Location – Pachpadra, Barmer, Rajasthan

40,000 indirect & 1000 direct employment

## Proposed Refinery in Barmer

Rajasthan produces crude oil 9 MMT last year and become largest onshore Crude oil producer of the country and second largest Total Crude oil producer (onshore + Offshore)

The proposed Refinery at Pachpadra, Barmer will feature a total of 29 process units, including

- 9 MMTPA crude distillation unit,
- 4.8 MMTPA vacuum distillation unit
- 1.8 MMTPA naphtha hydro-treating unit.
- Diesel hydro-treatment unit with a capacity of 4.1 MMTPA ,
- Vacuum gas oil treatment hydro-treater with a capacity of 3.5 MMTPA
- Petro-fluidised catalytic cracking unit with a capacity of 2.9 MMTPA
- Delayed coker unit with a capacity of 2.4 MMTPA
- Isomerisation unit with a capacity of 0.26 MMTPA
- Dual-feed cracker unit with a capacity of 82,000 TPA
- Ethylene recovery unit with a capacity of 77,000 TPA
- Two polyethylene units with a capacity of 0.416 MMTPA
- Two polypropylene units with a capacity of 0.49 MMTPA

The Barmer refinery is expected to process 1.5 MMTPA of crude indigenously produced in Rajasthan at the Mangla fields, 7.5 MMTPA of Arab and other crude, as well as natural gas during the initial eight years of operations.



# Chemicals





# High share of base chemicals with no major industrial infrastructure have resulted into low share of chemicals in the industrial GVA and relatively low presence of established players

## Key highlights

2,799 Cr Sector contribution to State GDP (2015-16)

2.1 % share of GVA in Indian sector (2015-16)

One of the largest refinery being developed in Barmer

19,793 persons employed

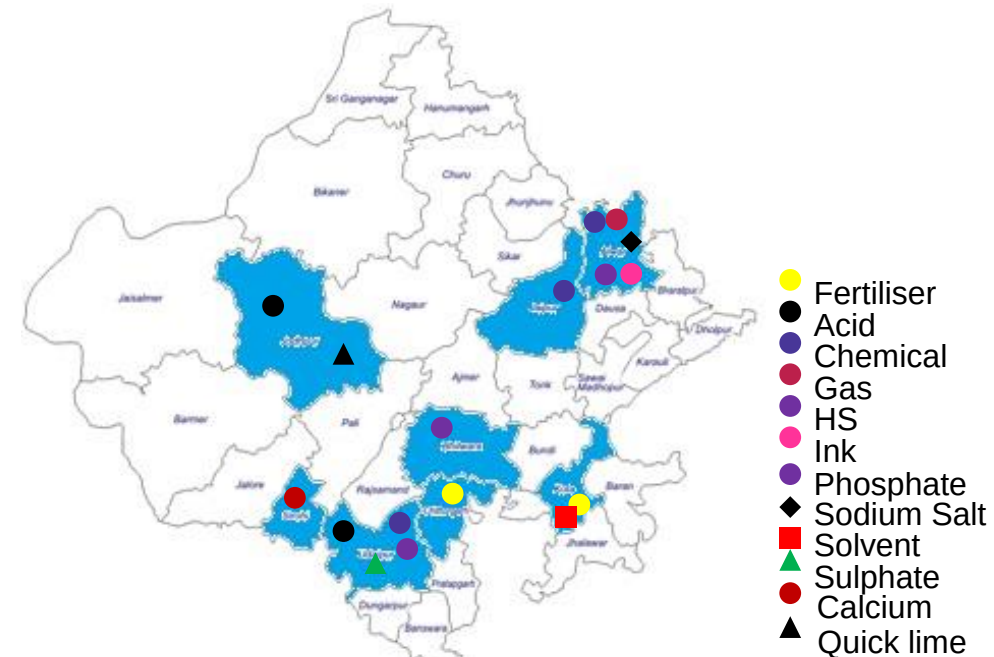
Key chemicals produced are fertilizer, pesticides and caustic soda

## Leading Players



Multi product

No major cluster



# Drugs & Pharma





# Rajasthan has good availability of raw materials for Herbal, Ayurvedic and has started efforts to promote pharmaceuticals segment-

## Sector Highlights

1<sup>st</sup> State to initiate manufacturing of low cost generic drugs

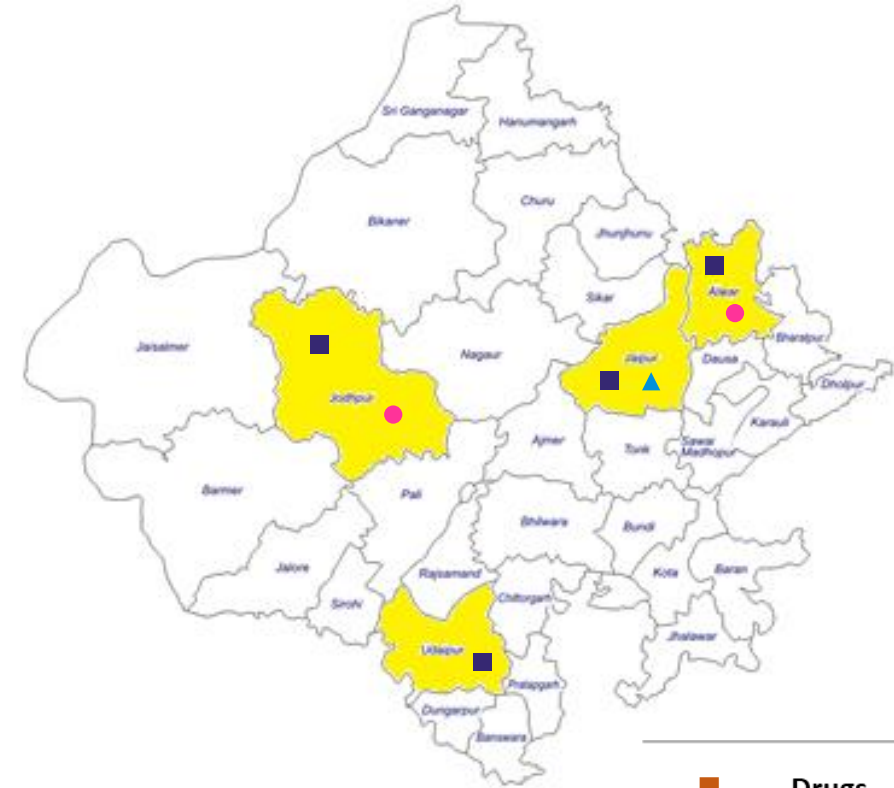
Strong presence in Herbal and Ayurveda segment, Guargum, herbs  
1.2 L MT production

Upcoming National Institute of Pharmaceuticals Education and Research (NIPER) at Jhalawar

## Major Pharmaceutical Industries in Rajasthan



## No major presence in Rajasthan



- Drugs
- Medical devices
- Ayurveda and Herbal

A white quadcopter drone is shown in flight, carrying a large white rectangular box suspended from its underside. The drone is positioned in the upper left quadrant of the frame. The background is a blurred city skyline at sunset, with warm orange and yellow light on the horizon and a clear blue sky above. The overall scene suggests a delivery or transport operation in an urban environment.

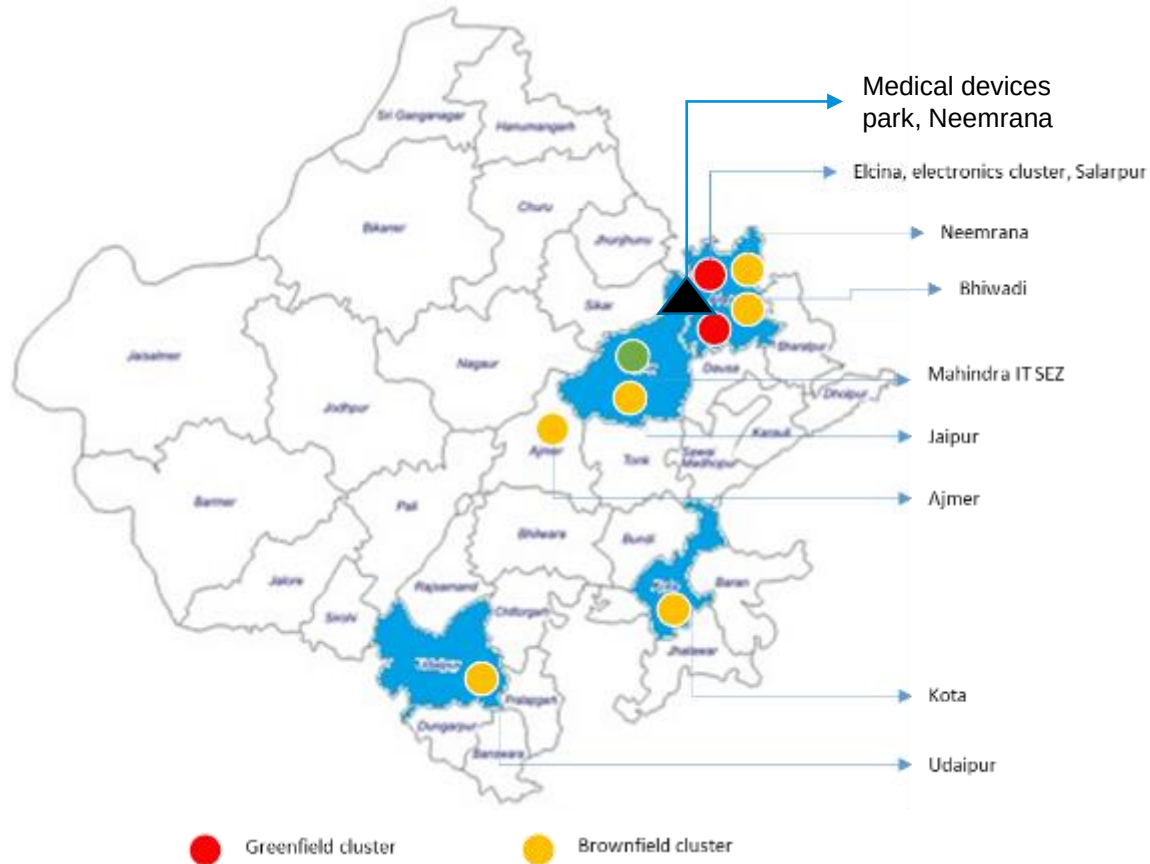
# ESDM

← Sector Plans



# Rajasthan's ESDM sector has the right ingredients for a giant leap in production

## Infrastructure set up



## Availability of Raw material and industrial consumers

Rank 1 in production of Silica, silver in India

2<sup>nd</sup> highest reserves of copper ore and copper concentrates

Upcoming petrochemicals sector in Rajasthan- rich supply of PET and PVC

Auto manufacturing zone in Alwar and in NCR area

## Established players



## Leather & Footwear





# Low base of Rajasthan in leather sector with high domestic demand provides ample opportunities for Rajasthan

## Key highlights

Sector contribution to state GDP- Rs 209 Cr\* (2015-16)

2 % share of GVA in India's Leather sector

State's Leather export grow with 38.9% CAGR

State with Highest number of cattle in country

Presence of pioneer Institute, Footwear Design & Development Institute (FDDI) in Jodhpur

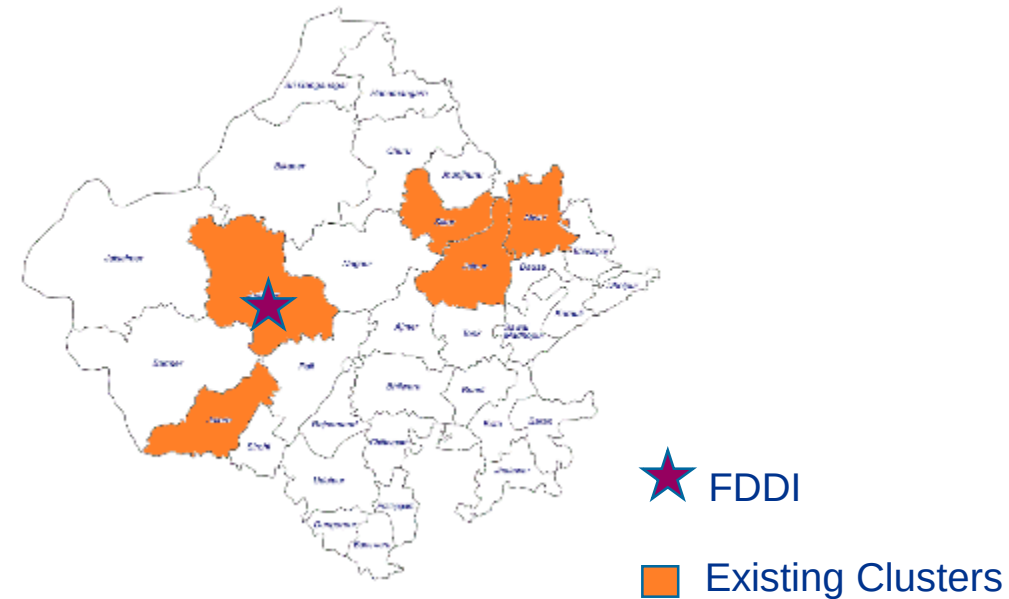
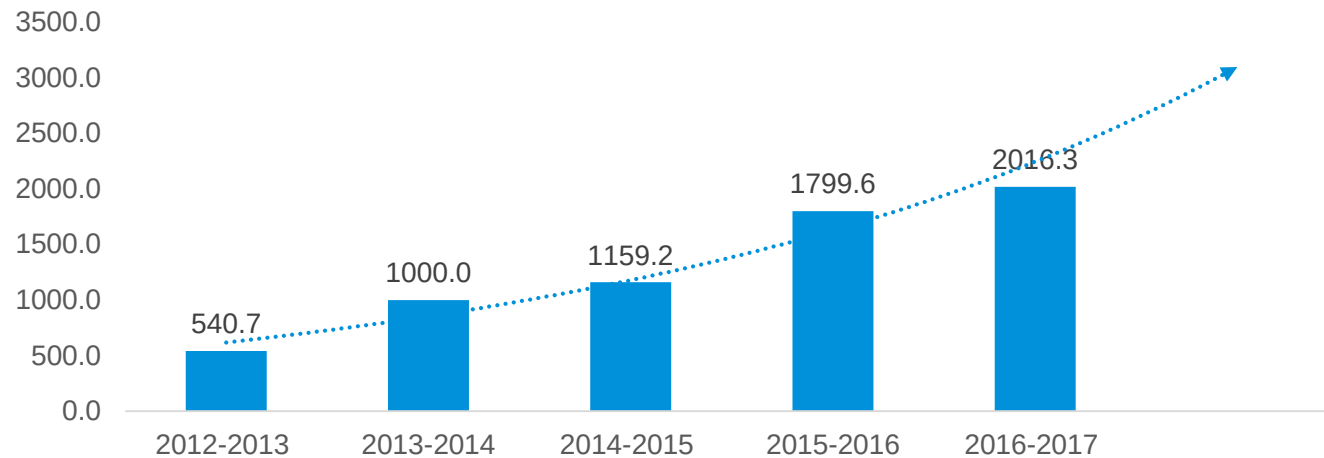
High demand of Rajasthan made traditional leather footwear in country

6 MSME cluster for Leather products manufacturing

Cluster of Traditional Leather footwear manufacturing

## Rising export in the sector

Export of Leather and its Articles from Rajasthan (in Million INR)



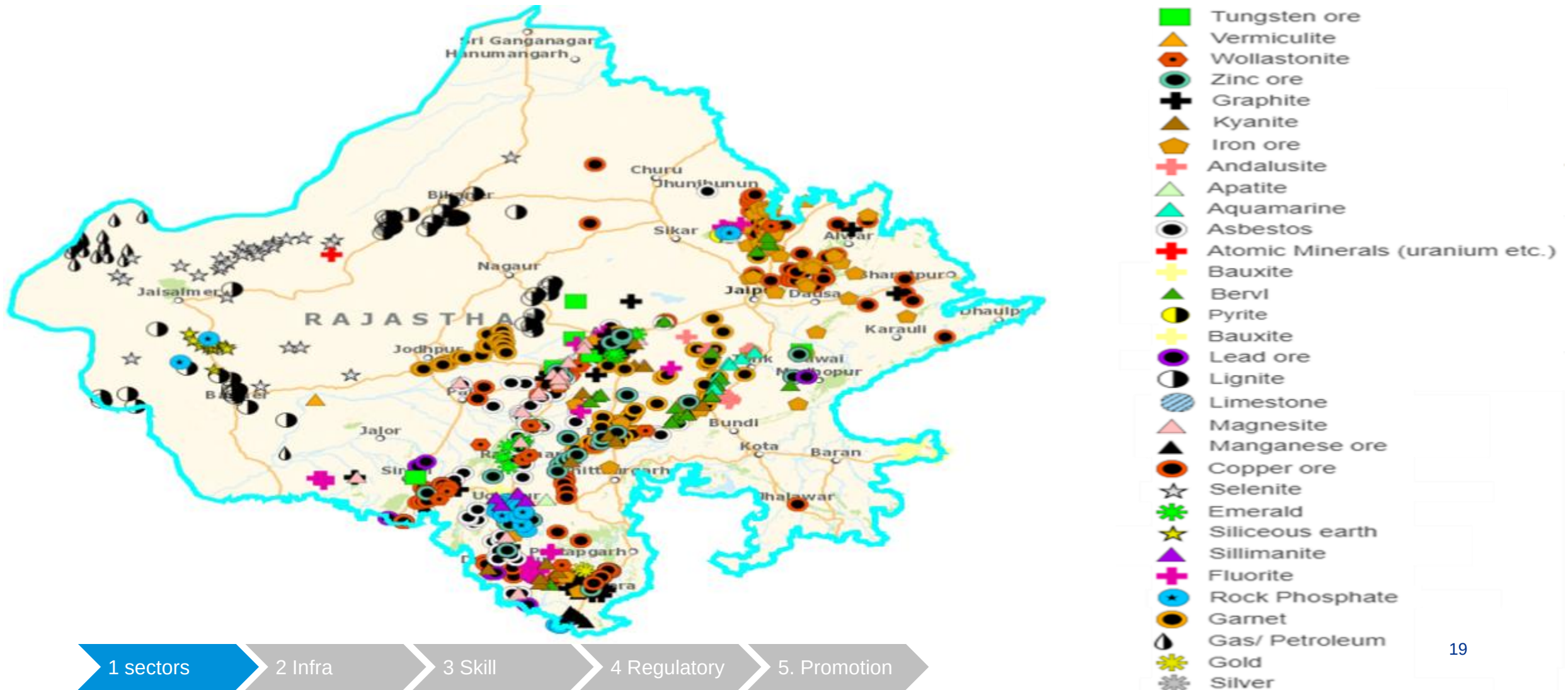
# Mines & Minerals

The background of the slide features a close-up, shallow depth-of-field shot of several hourglasses. The central hourglass is in sharp focus, showing a fine stream of red sand falling from its upper bulb into its lower bulb. Other hourglasses are visible in the foreground and background, but they are blurred, creating a sense of depth and time passing.

← Sector Plans



# A wide choice of minerals that are crucial ingredients to other sectors such as ESDM, Chemicals



**Thank you**