[Draft]

2019: District Industries' Profiles, Haryana

Submitted to,

Department of Industries & Commerce,
Government of Haryana

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Scope of the Report

The report has been conceived with an objective to enhance the understanding of manufacturing MSMEs landscape and industrial scenario across the districts of Haryana. The intent is to undertake a detailed diagnostic of MSME footprints in each district of Haryana and ascertain the areas for investment and improvement. The overall objective is for the existing MSMEs/large industries, potential investors, industries associations, chambers of commerce, societies/trusts and other stakeholders (centre government departments/Ministries, banks/FIs, autonomous organizations, consultants) to have a ready handbook capturing all the major aspects of MSME development in Haryana at district-level.

The report encompasses in-depth information on each district's geographic, demographic and administrative profile, along with sector-wise overview of MSME presence, investment and employment status at district-level. Apart from holistic sector-wise scenario, the report also provides insights into recent developments in each of the district, via analysing new investments in last three financial years. The report also shares insights on availability of raw material, key industrial estates and cluster scenario to facilitate industrial growth by assisting in critical decision-making. Some of the key issues faced by the industries present in the region have been called out, accompanied with possible areas for intervention and investment. Besides, snapshots have been included to give a glimpse of service sector and major large-scale units present in the district, as well as the current exports volume. *(The profiles have been sequenced to reflect the presence of MSME units in the district, in decreasing order).*

For this desired purpose, an extensive primary and secondary research was conducted. The data has been sourced from multiple avenues, including but not limited to UAM data (2019), DICs, 2011 Census of India, stakeholder consultation and several other secondary resources.

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01

Faridabad

Famous for....

"Auto Components Industry"

1 MSMEs in Faridabad

Total number of MSME units 7,634

New MSME units (last 3 years) 2,917

Fabricated Metal Products

Machinery & Equipment

Wearing Apparel

Rubber & Plastic Products

Motor Vehicles

Top 5 sectors – Maximum number of MSMEs

2 Investment Scenario in Faridabad

Total Investment (INR Lakhs) 4,04,576

New Investment (last 3 years; INR Lakhs) 1,02,311

Machinery & Equipment

Fabricated Metal Products

Rubber & Plastic Products

Motor Vehicles

Basic Metals

Top 5 sectors – Maximum investment by MSMEs

3 Employment Scenario in Faridabad

Total Employment 1,27,952

New Employment (last 3 years) 30,252

Machinery & Equipment

Fabricated Metal Products

Wearing Apparel

Motor Vehicles

Rubber & Plastic Products

Top 5 sectors – Most employment generated

4 Potential for MSMEs

Significant investment opportunity in manufacturing of upstream products which can act as an input for machinery, fabricated metal, auto component industry in the district

Opportunity for investment towards organised marketing/ common Display centre for the key sectors in the district such as auto-components, metal products etc.

5 Others

Total Exports (FY 18-19; INR Lakhs) 4,17,536

Number of Large & Mega units 81

Existing Clusters 5 Mini Clusters

1. INTRODUCTION

Faridabad, one of the prominent cities of the 'National Capital Region of India' is also one of the 22 Districts of Haryana. Faridabad is located on the prominent Delhi-Agra highway (NH-2). Faridabad is very near & well connected to other prominent Industry Centers of India such as Noida, Gurugram & South Delhi etc.

1.1 Geography

Faridabad lies in the South-east of the Haryana state, and is surrounded by Gurugram on the West, Delhi & Noida on the north, U.P. on the east and Palwal on the South. Faridabad has a largely plane landscape.

Faridabad has primarily hot semi-arid climate. The city experiences rainfall mostly in the monsoon season. River Yamuna flows along the boundary of the district.

1.2 Demographic Profile

As per the census of 2011, total population of Faridabad is 18,09,733 persons and is ranked 266th among 640 districts on population. District has a high population density of 2442 persons per Sq. Km. Rural to urban percentage distribution is 79.5% & 20.5% respectively. Faridabad has a high literacy rate of 83%. As Faridabad borders Punjab & Chandigarh, majority of the population in the district speaks Punjabi as their first language. The district has a lower female to male ratio at 873 females per thousand males, compared to the state average of 877 and significantly lower than the national average of 940. Population growth for Faridabad for the decade 2001-2011 is 31.75%.

1.3 Administrative Set-up

Faridabad has a total land area of 741 Sq. Km. Faridabad, Ballabgarh and Badkhal are the three sub-divisions of the district. There are two tehsils in Faridabad: Faridabad & Ballabgarh, 5 sub-tehsils, 3 Blocks, 3 Sub-divisions, 1 Lok Sabha Constituency & 6 Assembly Constituencies, 144 villages with116 gram panchayats.

The following table shows categorization of blocks as per the status of industrial development.

Table 1: **[Faridabad]** Categorization of Blocks

Block A	Block B	Block C	Block D
Faridabad	Tigaon		
Ballabgarh			

2. SECTOR WISE MSME LANDSCAPE

Following table shows the total number of MSME units in each sector, in Faridabad, along with the bifurcation of number of micro, small and medium enterprises.

The table also shows number of new units that started their commercial production in the last three financial years.

Table 2: **[Faridabad]** No. of MSME Units in each Sector

S. No.	Industry	Total Units	Micro	Small	Medium	New Units (Last 3 Years)
Food, Beverages & Tobacco						
1	Food products	266	225	39	2	149
2	Beverages	42	36	6	0	27
Textiles & Apparel						
4	Textiles	255	160	84	11	115
5	Wearing apparel	550	445	99	6	442
Leather, Wood & paper						
6	Leather and related products	46	33	12	1	23
7	Wood and products of wood and cork, except furniture; articles of straw and plaiting materials	81	65	16	0	28
8	Paper and paper products	197	125	68	4	71
9	Furniture	85	62	22	1	44
Pharma, Petro-Chemicals, Rubber products						
10	Pharmaceuticals, medicinal chemical and botanical products	60	49	11	0	19
11	Chemicals and chemical products	210	163	45	2	88
12	Coke & Refined Petroleum Products	13	7	6	0	1
13	Rubber and plastics products	561	336	213	12	162
Metals & Mineral Products						
14	Basic metals	373	236	122	15	126
15	Fabricated metal products, except machinery and equipment	879	529	326	24	320
16	Non-metallic mineral products	99	74	23	2	47
Electrical, Electronics & Machinery						
17	Computer, electronic and optical products	109	86	23	0	54

18	Electrical equipment	422	307	109	6	152
19	Machinery and equipment	1068	701	355	12	332
Automotive & Auto-Components						
20	Motor vehicles, trailers and semi-trailers	543	269	262	12	154
21	Other Transport Equipment	56	33	22	1	24
Other Manufacturing						
22	Other manufacturing	1719	1051	634	34	539

Following scatter diagram shows the comparison between total units in each sector vis-a-vis new units opened in the last 3 financial years.

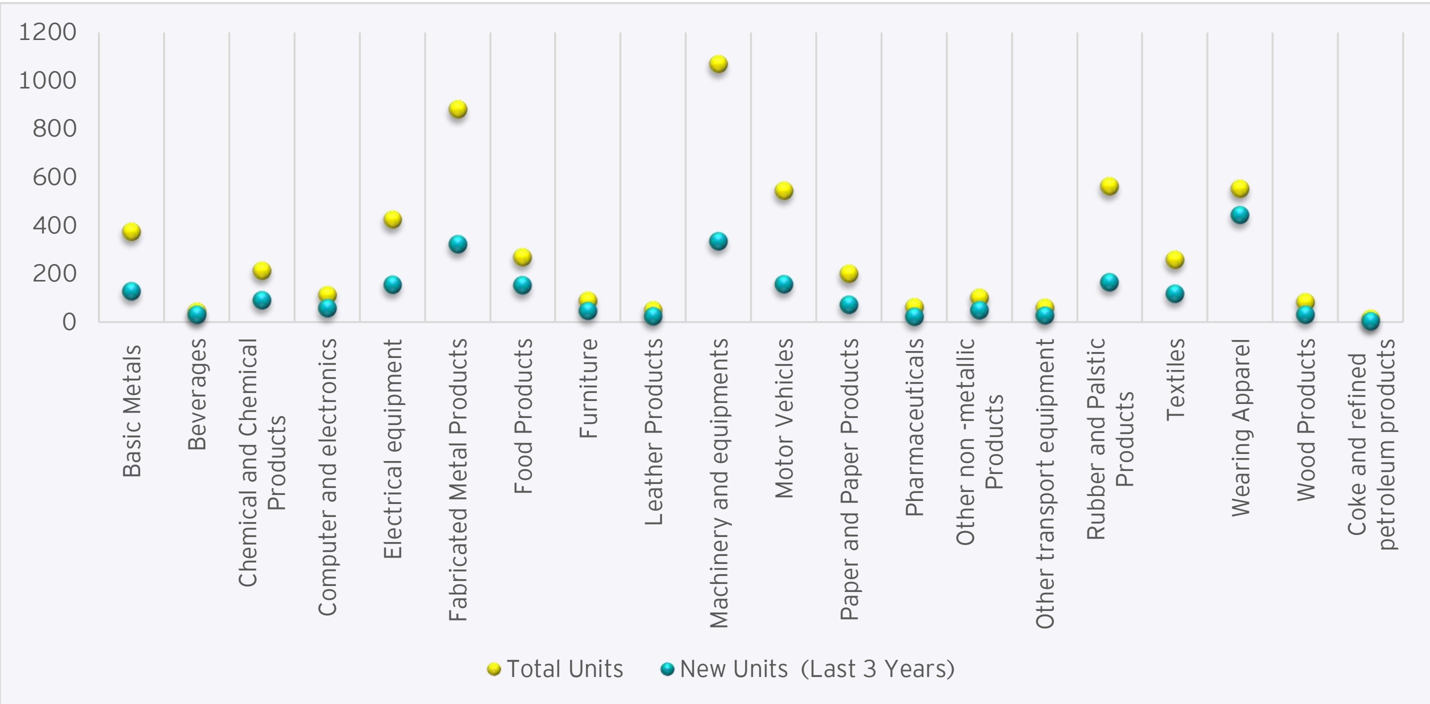


Figure 1: **[Faridabad]** Total Units & New Units in each Sector

2.1 Top 10 Sectors: Based on Number of Units

Following table shows top ten sectors in Faridabad, based upon the total number of MSME units in the district.

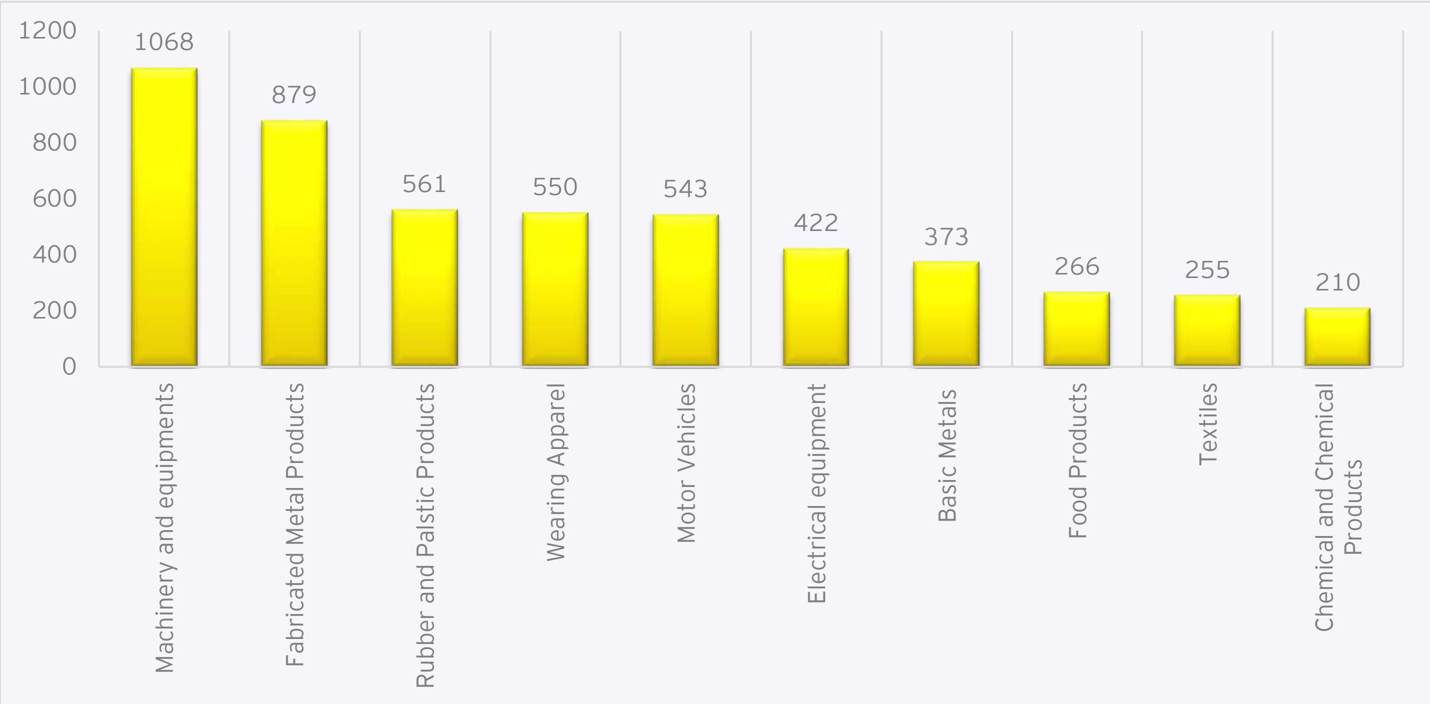


Figure 2: **[Faridabad]** Top 10 sectors - Total No. of MSME Units

2.2 Top 10 Sectors: Based on New Units in Last 3 Years

Following table shows the top ten sectors in Faridabad, based upon number of new MSME units set-up in the last three years.

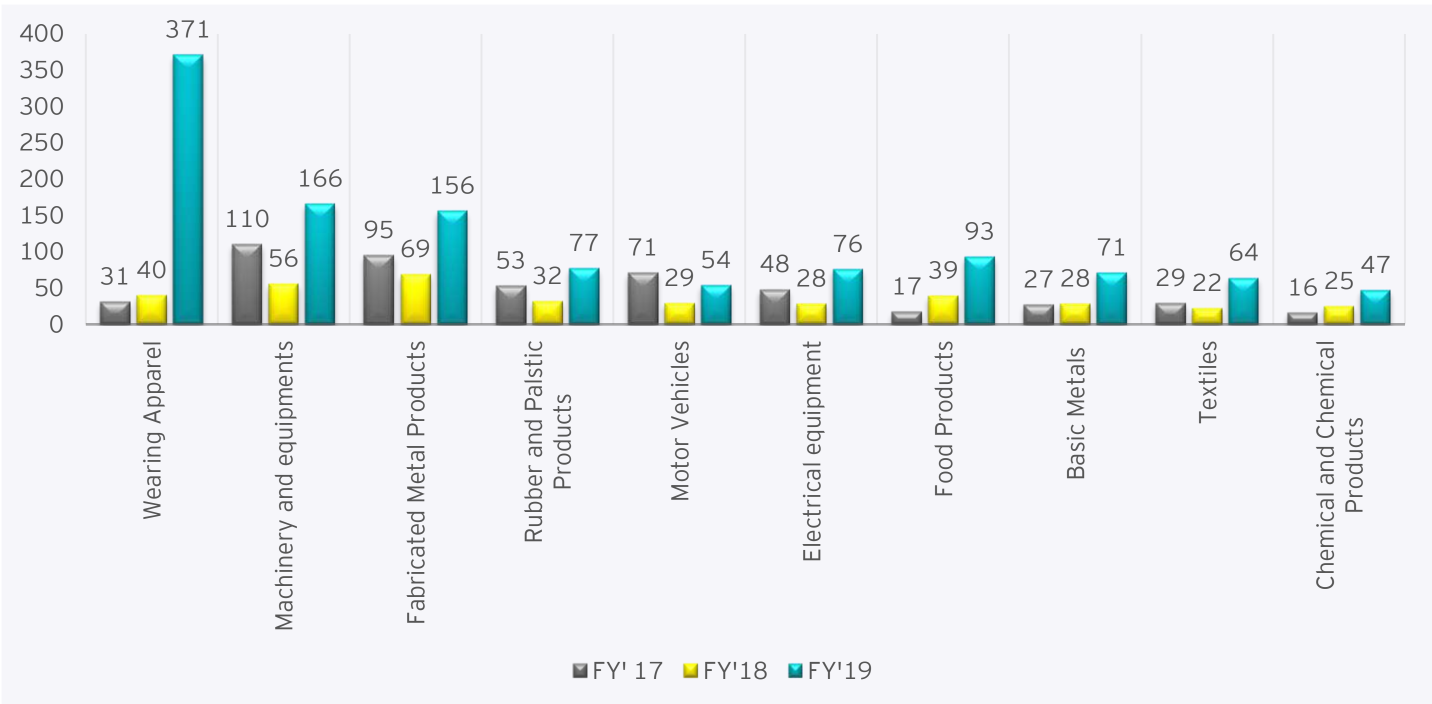


Figure 3: **[Faridabad]** Top 10 Sectors - New Units in Last 3 Years

Key Takeaways

- Maximum no. of MSME units in Faridabad are involved in the machinery & equipment sector, followed by fabricated metal products.
- Apart from machinery & equipment and fabricated metal products; rubber & plastic products, wearing apparel & motor vehicles have significant number of MSMEs operating out of Faridabad.
- In last three years, wearing apparel sector has seen maximum number of new MSME units opened (442), followed by machinery & equipment (332) & fabricated metal products (320).
- In terms of percentage growth, wearing apparel has experienced impressive recent growth with 80.36% of the total units having opened up in the last 3 years, followed by beverages 64.29%.

3. SECTOR WISE INVESTMENT SCENARIO

Punjab National Bank is the convener bank of State Level Bankers' Committee (SLBC) in Haryana. While Syndicate Bank is the district lead bank of Faridabad.

Following table shows the total investment by MSMEs in each sector in Faridabad, along with new investment in the last three financial years (figures are in lakhs).

Table 3: **[Faridabad]** Total Investment by MSMEs

S. No.	Industry	Investment (INR Lakhs)				
		Total Investment	FY'17	FY'18	FY'19	New Investment (Last 3 Years)
Food, Beverages & Tobacco						
1	Food products	8012	148	981	1107	2236
2	Beverages	1295	90	65	1115	1270
Textiles & Apparel						
3	Textiles	19347	2363	294	1119	3776
4	Wearing apparel	15003	2021	1838	1995	5854
Leather, Wood & Paper						
5	Leather and related products	2309	127	7	127	261
6	Wood and products of wood and cork, except furniture;	2057	4	162	351	517

	articles of straw and plaiting materials					
7	Paper and paper products	11072	902	172	1014	2088
8	Furniture	3143	150	157	543	850
Pharma, Petro-Chemicals, Rubber products						
9	Pharmaceuticals, medicinal chemical and botanical products	2212	386	17	92	495
10	Chemicals and chemical products	7395	246	508	1174	1928
11	Coke & Refined Petroleum Products	820	500	0	0	500
12	Rubber and plastics products	32941	3841	554	2958	7353
Metals & Mineral Products						
13	Basic metals	26156	2804	199	1197	4200
14	Fabricated metal products, except machinery and equipment	60653	11288	1586	4236	17110
15	Non-metallic mineral products	3377	62	239	475	776
Electrical, Electronics & Machinery						
16	Computer, electronic and optical products	3390	1037	137	330	1504
17	Electrical equipment	18344	1945	886	1795	4626
18	Machinery and equipment	49488	6090	1650	5697	13437
Automotive & Auto-Components						
19	Motor vehicles, trailers and semi-trailers	41101	5585	2113	2303	10001
20	Other Transport Equipment	2803	1419	70	243	1732
Other Manufacturing						
21	Other manufacturing	93658	11589	3588	6620	21797

Following scatter diagram shows a comparison of total MSME investment and new investment in the last 3 financial years, across different sectors of Faridabad.

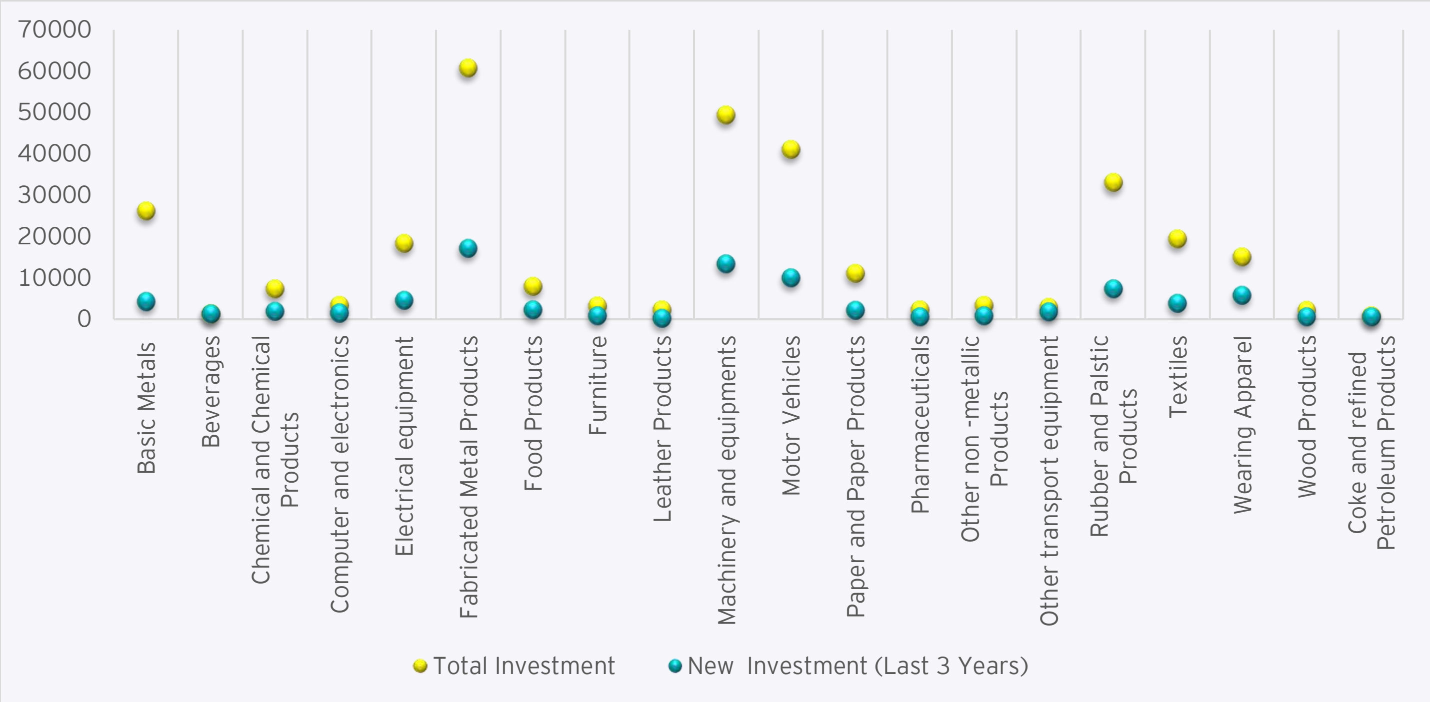


Figure 4: **[Faridabad]** Total Investment & New Investment in Last 3 Financial Years (FY'17-FY'19)

Following pie-chart showcases the sectors that have attracted maximum investments in the last 3 financial years (figures are in Lakhs).

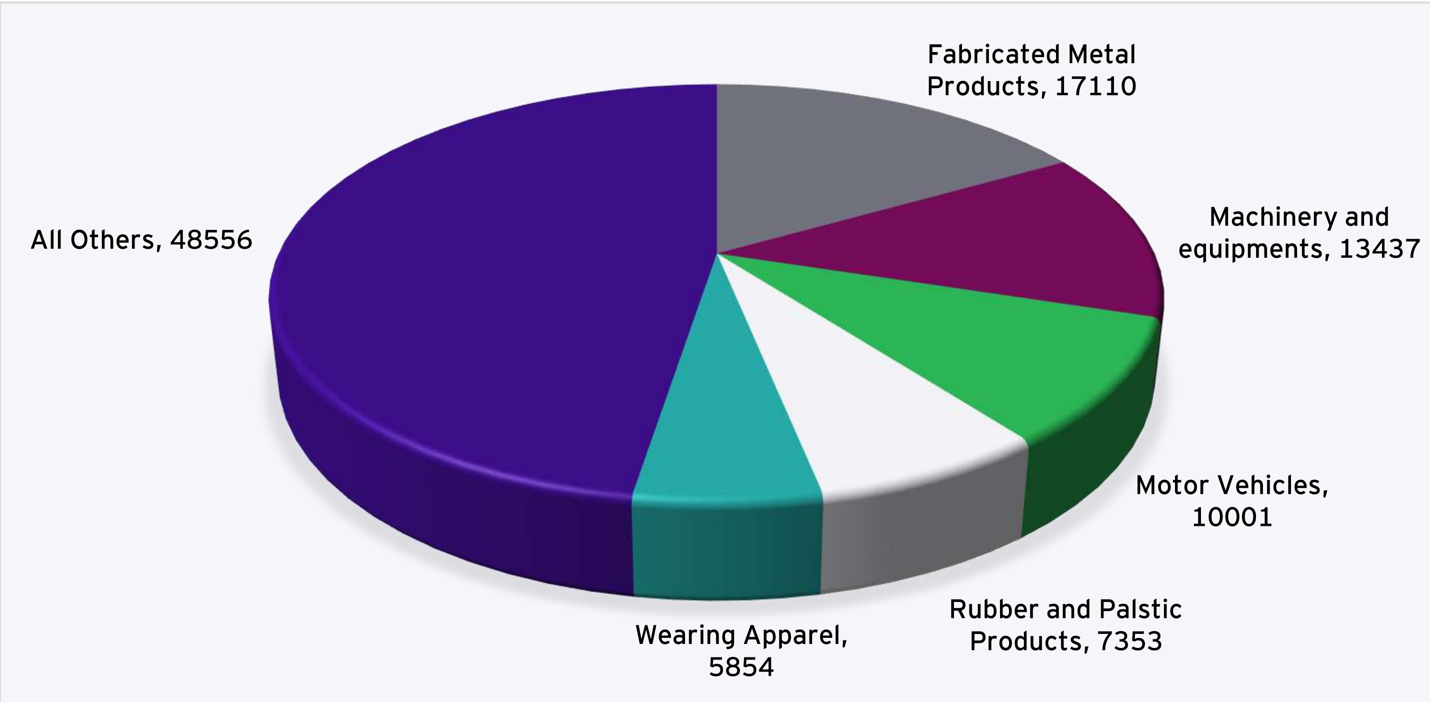


Figure 5: **[Faridabad]** Top 5 Sectors with maximum investment in last 3 Financial Years (FY'17-FY'19)

Following diagram shows a comparison of compound annual growth rate of various sectors for last three financial years.

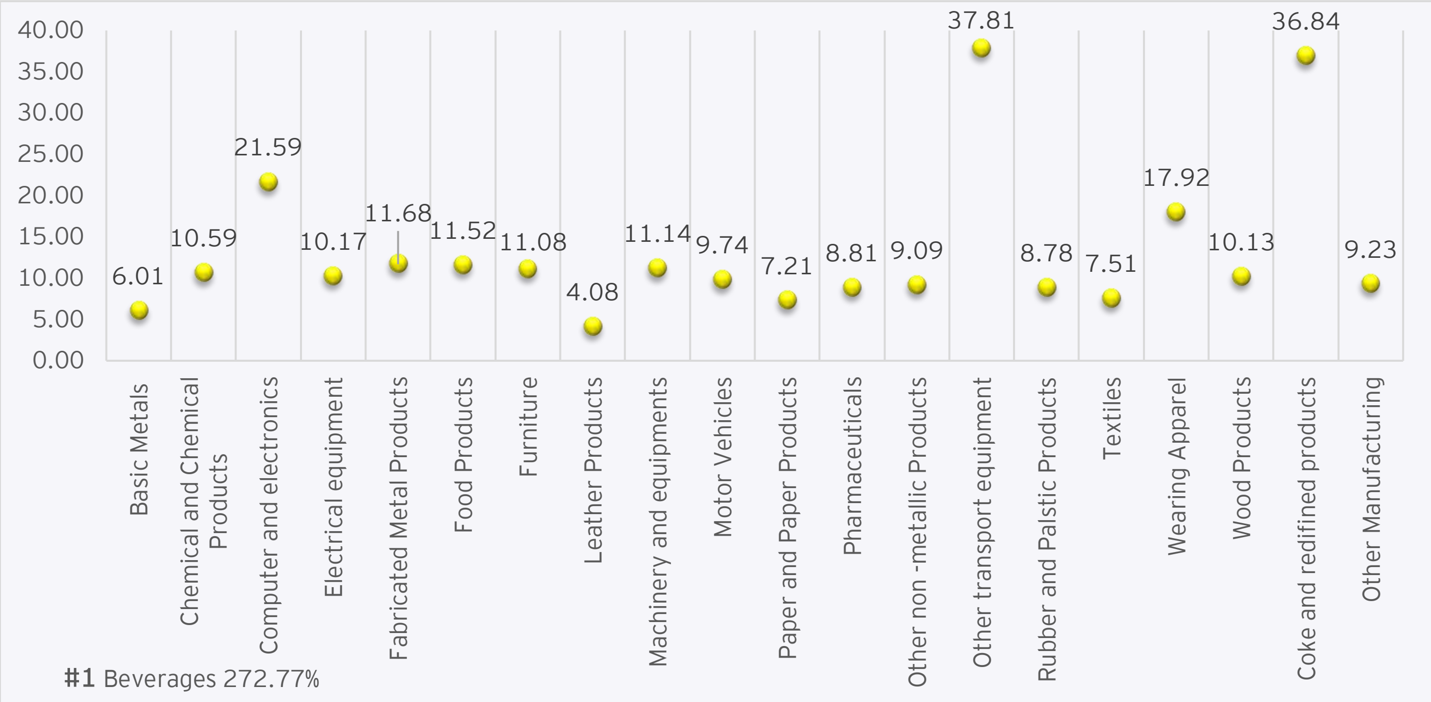


Figure 6: **[Faridabad]** CAGR for Last 3 Financial Years (FY'17-FY'19)

Key Takeaways

- Highest amount of investment by MSMEs in Faridabad has been in fabricated metal products sector (INR 606.53 Cr), followed by machinery & equipment sector (INR 494.88 Cr).

- Last three financial years have seen maximum investment in fabricated metal products sector (INR 171.10 Cr) and machinery & equipment (INR 134.37 Cr).

- As evident apart from fabricated metal products, machinery & equipment, motor vehicles, rubber & plastic products and wearing apparel have attracted the maximum investments in last three financial years.

- Highest CAGR for last 3 financial years has been recorded in the beverages sector at 272.77%, which being an outlier is not represented in the above plot. Other sectors with high CAGR in MSME investments in last 3 FYs are: other transport equipment (37.81%), coke & refined petroleum products (36.84%), computer & electronics (21.59%), wearing apparel (17.92%), and fabricated metal products (11.68%).

4. SECTOR WISE EMPLOYMENT SCENARIO

Below table showcases the total employment created by MSMEs in each of the sectors, along with new employment created in the last three financial years.

Table 4: **[Faridabad]** Total Employment in each Sector

S. No.	Industry	Total employment	FY'17	FY'18	FY'19	New Employment (Last 3 Years)
Food, Beverages & Tobacco						
1	Food products	1831	83	191	484	758
2	Beverages	231	35	37	129	201
Textiles & Apparel						
3	Textiles	7787	891	195	968	2054
4	Wearing apparel	11922	1819	1045	1523	4387
Leather, Wood & paper						
5	Leather and related products	1456	502	15	83	600
6	Wood and products of wood and cork, except furniture; articles of straw and plaiting materials	990	12	106	143	261
7	Paper and paper products	3057	277	78	229	584
8	Furniture	822	39	54	162	255
Pharma, Petro-Chemicals, Rubber products						
9	Pharmaceuticals, medicinal chemical and botanical products	1126	235	13	43	291
10	Chemicals and chemical products	2328	184	167	396	747
11	Coke & Refined Petroleum Products	162	20	0	0	20
12	Rubber and plastics products	9006	873	188	654	1715
Metals & Mineral Products						
13	Basic metals	6909	505	131	525	1161
14	Fabricated metal products, except machinery and equipment	15083	2221	518	1305	4044
15	Non-metallic mineral products	991	50	152	176	378

Electrical, Electronics & Machinery						
16	Computer, electronic and optical products	1468	200	302	111	613
17	Electrical equipment	8438	634	302	912	1848
18	Machinery and equipment n.e.c.	14360	2089	529	1445	4063
Automotive & Auto-Components						
19	Motor vehicles, trailers and semi-trailers	13199	71	29	54	154
20	Other Transport Equipment	808	204	23	229	456
Other Manufacturing						
21	Other manufacturing	25978	2226	1212	2224	5662

Following scatter diagram shows a comparison of total employment across different MSME sectors and new employment generated in the last 3 financial years.

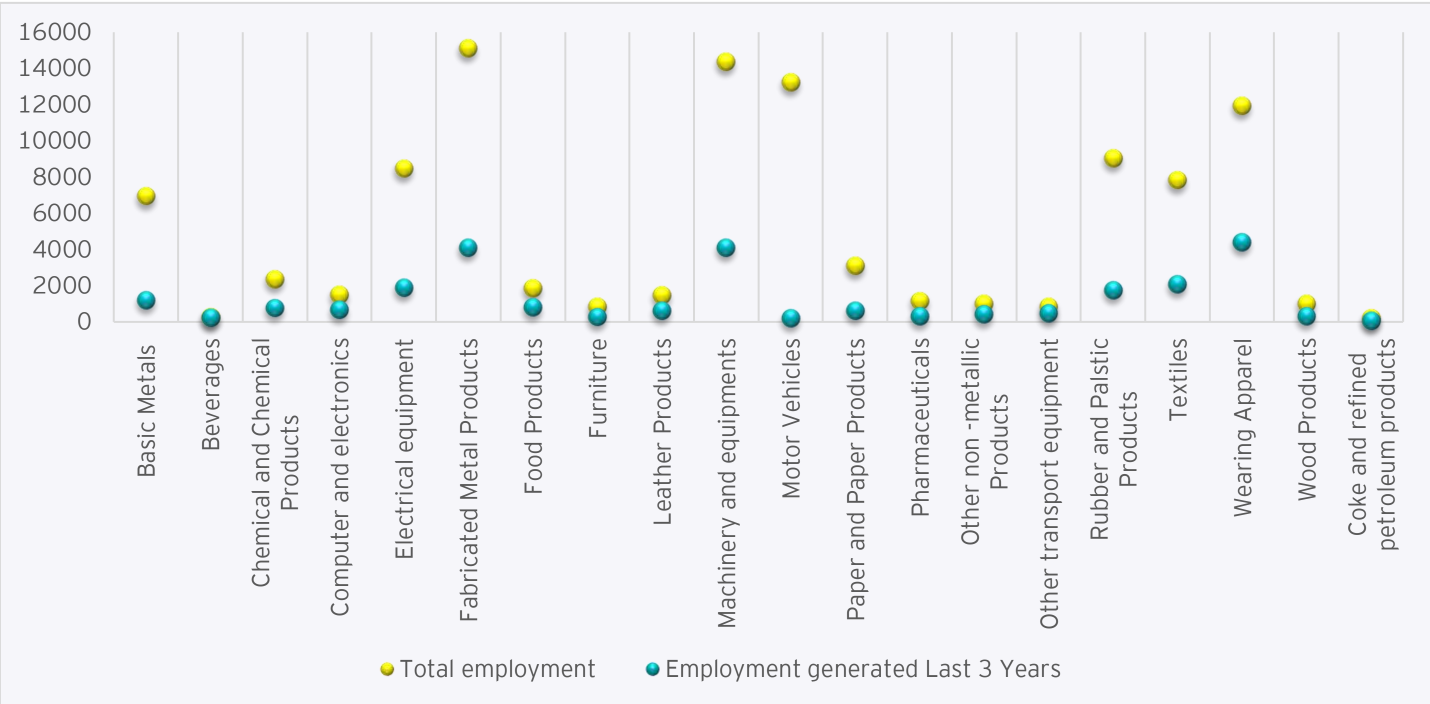


Figure 7: **[Faridabad]** Total Employment & New employment in last 3 Financial Years (FY'17-FY'19)

Following bar chart showcases category wise per unit employment analysis for MSMEs in Faridabad.

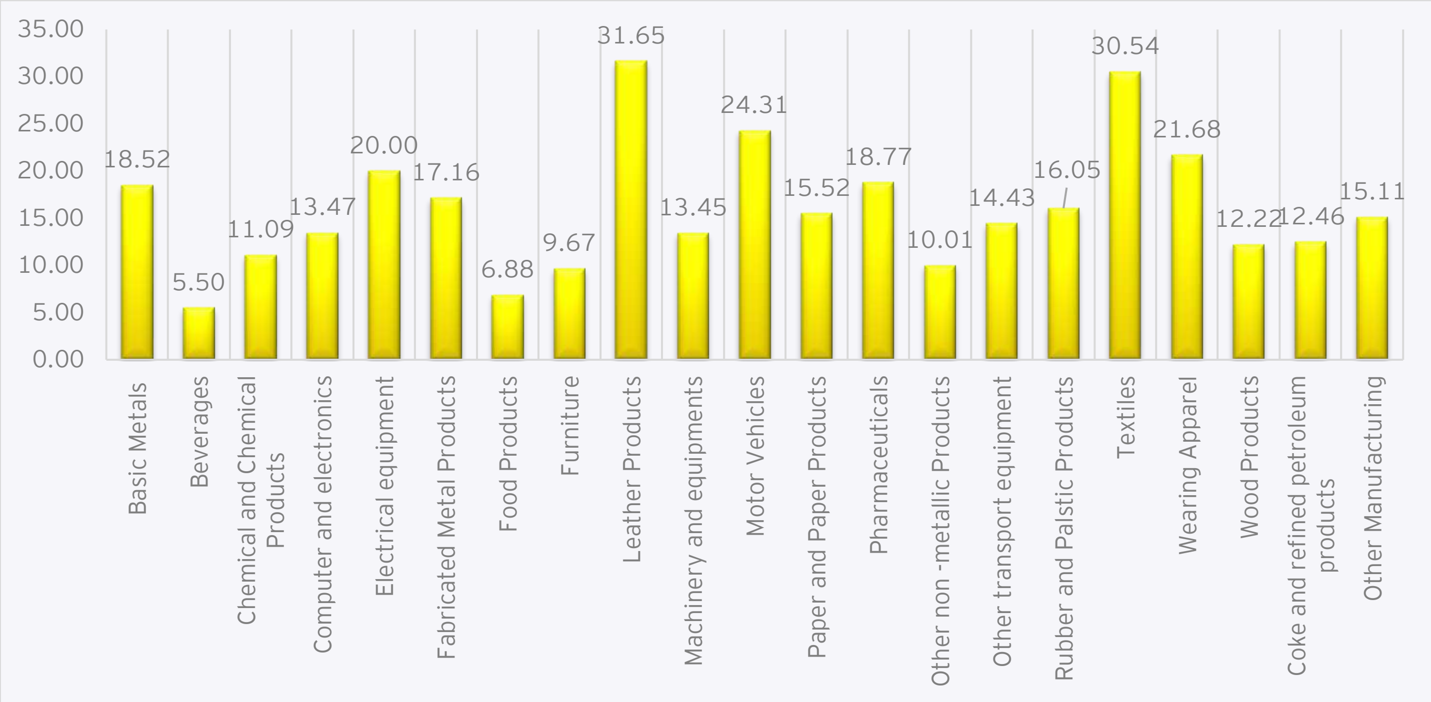


Figure 8: **[Faridabad]** Category wise employment intensity

Following pie-charts showcase the sectors that have created maximum employment in each of the last 3 financial years.

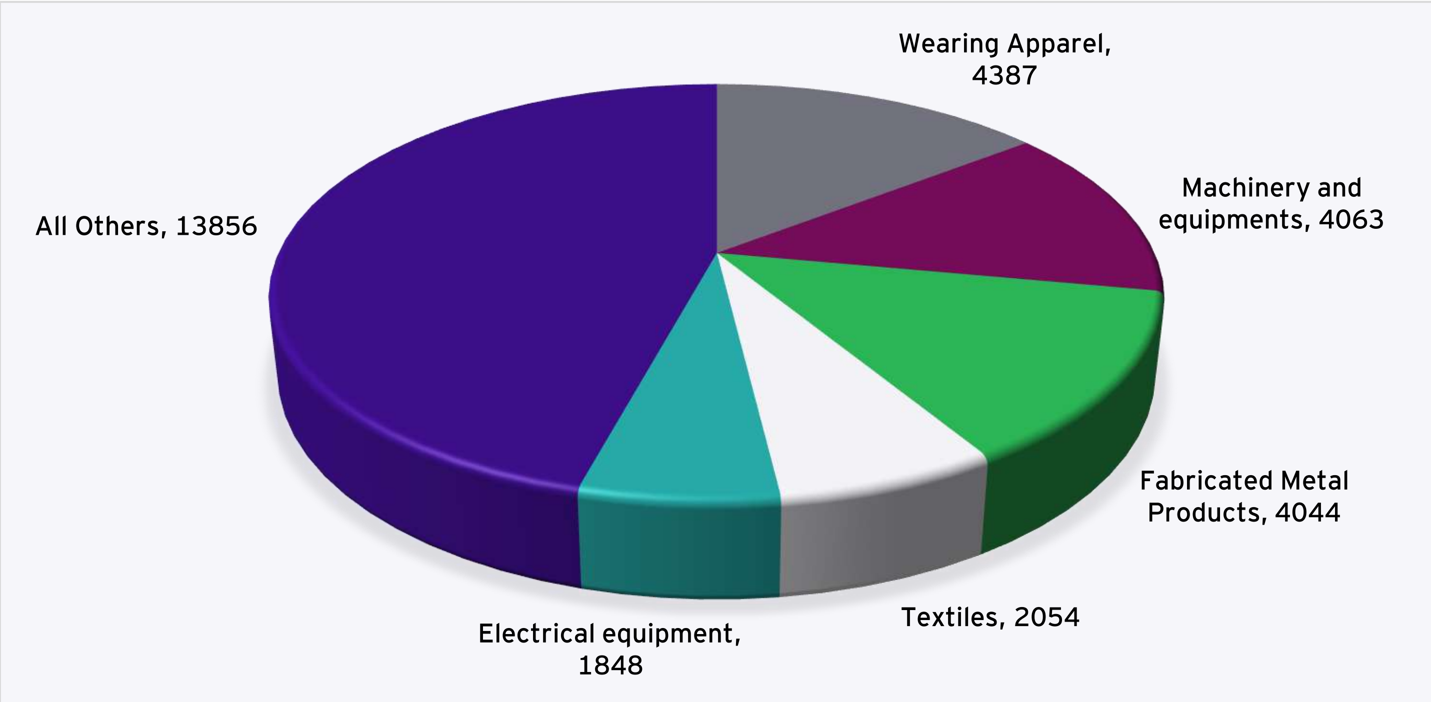


Figure 9: **[Faridabad]** Top 5 Sectors with maximum new employment in last 3 Financial Years (FY'17-FY'19)

Key Takeaways

- Fabricated metal products MSME sector provides the maximum employment (15,083) followed by machinery & equipment sector (14,360) & motor vehicles sector (13,199).

- Wearing apparel sector has created the maximum new employment in last 3 years (4,387), followed by machinery & equipment (4,063) & fabricated metal products (4,044). Sectors such as motor vehicles, beverages, and coke & refined petroleum products have experienced relatively low growth in new employment.

- Manufacturers of leather products have maximum employment intensity with an average of 31.65 employees per unit, followed by manufacturers of textiles with 30.54 employees per unit and manufacturers of motor vehicles at 24.31 employees per unit.

- Beverages has the least employment intensity with only 5.50 employees per unit, followed by food products at 6.88 employees per unit.

- Wearing apparel sector has created the maximum employment in Faridabad in last three years, followed closely by the machinery & equipment sector. Other sectors in top 5 in terms of employment creation are fabricated metal products, textiles & electrical equipment.

5. EXPORTS FROM THE DISTRICT

Key exports products from Faridabad include electrical equipment, leather & related products and machinery & equipment. Following table shows some of the exports from Faridabad for last 3 FYs.

(The export data in the table shows only exports related information that is available at the District Industries Centre, Faridabad, and actual exports figure might be significantly higher).

Table 5: Exports from Faridabad

S. No.	Industry	Exports (INR Lakhs) FY'17	FY'18	FY'19
1	Electrical equipment	32080	54841.159	55519
2	Leather Products	12887	17642.56	19747
3	Machinery and equipment	11070	39647.906	20012
4	Motor Vehicles	6830.7	28934.602	25665
5	Pharmaceuticals	20338	65358.71	62848
6	Rubber and Plastic Products	15429	20926.78	24223
7	Wearing Apparel	77655	94362.91	157474
8	Other Manufacturing	31519	29891.67	52040

6. NATURAL RESOURCES & RAW MATERIAL AVAILABLE

Majority of the population in Faridabad is involved in the tertiary sector. However, some of the key agricultural produce include Sugarcane, Cotton, Cereals & Millets, Pulses, Mustard seeds, Sesamum etc.

Faridabad has a total forest cover of around 70 sq. km and the main flora consists of Karir, Khair, Kikar, Dhak, Gular, Papri, Ber etc.

Minerals available in Faridabad include Clay, Ordinary and silica sand, brick earth & Stones for building etc.

7. KEY INDUSTRIAL ESTATES

Faridabad being one of the most industrialized districts of Haryana has a high concentration of Industrial Estates. Following is a list of current Industrial Estates in Faridabad:

Table 6: Key Industrial Estates in Faridabad

S. No.	Industrial Estates
1	Sector -4
2	Sector-5
3	Sector-6
4	Sector-13
5	Sector-24
6	Sector-25
7	Sector-27 A
8	Sector -27 B
9	Sector - 27 C
10	Sector -27 D
11	Sector -28
12	New DLF Industrial Area
13	Sector-31
14	Sector-58
15	Sector-59
16	Pragati Vihar
17	IMT Industrial Area

Details of HSIIDC plots in Faridabad are as under:

Total number of Plots	414
Allotted Plots	386
Un allotted Plots	28
Units in Production	375
Percentage of plots allotted	93.2%

Details of plots under Industrial Model Townships in Faridabad are as under:

Total number of Plots	820
Allotted Plots	410
Un allotted Plots	410
Units in Production	-
Percentage of plots allotted	50%

8. MAJOR LARGE-SCALE UNITS

Apart from MSMEs, Faridabad also has many Large & Mega enterprises operational in various sectors. Below table showcases number of Large & Mega enterprises in each sector along with their names.

Table 7: **[Faridabad]** Large & Mega Units in each Sector

S. No.	Industry	Large & Mega Industries
1	Manufacture of Basic Metals	• Star - Wire India Ltd • Sadhu forging Pvt. Ltd • Hyderabad Industries • Jotindra Steel & Tubes • Plasser (India) Pvt. Ltd • Pooja Forge Pvt. Ltd • GKN Driveline Transmission Ltd. • Sadhu Udyog • Starwire India Ltd. Unit (II) • Woodward Governor India (P) Ltd. • Sanden Vikas (India) Ltd. • Super Auto India Ltd • Mahavir Die Casting
2	Manufacture of Chemical and Chemical Products	• HPL Additives Ltd.
3	Manufacture of Computer and electronics	• The Printer House
4	Manufacture of electrical equipment	• Orient Electric Ltd • Whirlpool of India Ltd. (Refrigeration Division) • Havells India Ltd • Orient Electric Ltd. • Globe Capacitors Ltd • Super Electro Films • Marathon Electric India Pvt. Ltd. • ABB India Ltd. • Metal Coatings India Ltd. • Tecumseh Products India (P) Ltd.
5	Manufacture of Food Products	• G.K. Dairy & Milks Products Pvt. Ltd
6	Manufacture of Leather Products	• Lakhani Footwear, Lakhani India Ltd. • Cosmic Consumer Goods Pvt. Ltd • Northern India Leather Cloth Mfg. Co. Pvt. Ltd

7	Manufacture of machinery and equipments	• Humbolt Wedag India Pvt. Ltd. • Vee Gee Engineers Pvt. Ltd • JBM Industries Ltd. • Victora Auto Pvt. Ltd • BCH Electric Ltd • Porritts & Spencer (Asia) Ltd • JCB India Ltd. • Super Screws • Sterling Tools India Ltd. • Avery India Ltd.
8	Manufacture of Motor Vehicles	• M/s JBM Auto Limited • M/s Yamaha Motors India (P) Ltd • M/s Victora Auto Pvt. Ltd • M/s Indo – Autotech Ltd • M/s Imperial auto industries Ltd • New Allenberry Works • Victora Tools Engineers Pvt. Ltd. • Escorts Ltd, Showa India Pvt. Ltd
9	Manufacture of Paper and Paper Products	• Voith paper Ltd • Kanin India Ltd. • Ajanta Offset & Packaging, Ltd. • Nova Publications & Printers Pvt. Ltd. • Sai Security Printers Pvt. Ltd. • Thompson Press,
10	Manufacture of Pharmaceuticals	• Jagsonpal Pharmaceuticals Ltd • Poly medicure Ltd • Hindustan Syringes & Medical Devices Ltd • Poly Medicure Private Limited • Neeraj Industries Limited • Lakhani Medicare Pvt. Ltd,
11	Manufacture of other transport equipment	• M/s Escorts Ltd. (Engg. Division)
12	Manufacture of Rubber and Plastic Products	• Good Year India Ltd
13	Manufacture of Textiles	• SPL Limited • SPL Industries Ltd
14	Manufacture of wearing Apparel	• Scorpios Apparels (P) Ltd. • Maurya Udyog Ltd. (Terry Towel Division) Sohna Road • STL global Ltd. • Shahi Exports Ltd. • Dhruv Global Ltd. • Pee Empro Export Pvt • Gupta Exim (India) Pvt. Ltd. • Haryana Tex Prints (Overseas) Ltd.

15	Other Manufacturing	• KCL Ltd. • Khemka Containers (KCL) Ltd. • Studds Accessories Ltd. • Elofic Industries Ltd. • Sledgehammer Oil Tools Pvt. Ltd.

9. SERVICES SECTOR SNAPSHOT

Faridabad has a thriving services sector & many IT & IT enabled services MNCs have their offices in Faridabad.

Apart from this there are several MSMEs also involved in services sector. Below table gives snapshot of the services sector in Faridabad:

Table 8: **[Faridabad]** Services Sector Snapshot

S. No.	Activity	Total Enterprises	Micro	Small	Medium	Total Investment (INR Lakhs)	Total Employment
1	Accommodation	23	15	6	2	1006	737
2	Activity of Extra territorial	1	1		-	5	5
3	activity of House hold	1	1		-	2	2
4	Activity of head office management	64	59	5	-	447	347
5	Activity of Membership	10	9	1	-	49	43
6	Advertisement & Market Research	44	39	5	-	220	280
7	Architecture & Engineering	110	89	20	1	1361	624
8	Broadcasting & Programming	1	1		-	1	5
9	Civil Engineering	23	17	5	1	527	358
10	Computer Programming	195	177	17	1	1523	1128
11	Creative arts	29	26	3	-	189	92
12	Construction of Building	28	22	6	-	220	199
13	Crops & animal production	3	3	-	-	14	5
14	Education	155	138	16	1	1318	912
15	Employment Activity	127	120	7	-	603	2741
16	Electricity & Gas	12	9	3	-	103	68
17	Financial Service	77	75	2	-	303	274

	activity						
18	Fishing activity	1	1	-	-	6	4
19	Food & Beverage	224	187	37	-	1631	1034
20	Gambling & Betting	2	1	1	-	24	47
21	Human Health activity	92	66	24	2	2026	448
22	Information service activity	91	86	5	-	365	374
23	Insurance activity	17	17	-	-	53	40
24	Land & Transport	124	83	40	1	2047	438
25	Legal accounting	89	87	2	-	257	284
26	Mining & Quarrying	3	2	1	-	30	20
27	Motion pictures	20	19	1	-	112	103
28	Office Administration	93	75	18	-	1165	1193
29	Other Financial activity	51	47	4	-	220	157
30	Other mining activity	14	9	4	1	457	77
31	Other Personal activity	299	271	28	-	1868	1579
32	Other Professional Activity	372	285	85	2	4344	2401
33	Postal & Courier	14	12	2	-	161	96
34	Publishing Activity	40	37	3	-	171	136
35	Printing & Reproduction Activity	12	12	-	-	52	39
36	Public administration & Defense	4	4	-	-	8	9
37	Real estate Activity	114	98	16	-	857	461
38	Rental & Leasing	79	65	14	1	1100	290
39	Remediation Activity	3	2	1	-	212	410
40	Repair installation of Machinery	90	74	16	-	726	500
41	Repair of Computer	112	102	10	-	559	462
42	Residential care	25	19	6	-	217	257
43	Scientific research	8	8	-	-	37	39

44	Security & investigation activity	39	38	1	-	160	454
45	Services to building	71	60	10	1	1034	1201
46	Sewerage	2	1	1	-	25	12
47	Social work activity	11	10	1	-	35	384
48	Specialized Construction activity	49	42	7	-	505	269
49	Sports & Amusement activity	10	8	2	-	103	87
50	Telecommunication	130	119	11	-	529	364
51	Travel agency	109	100	8	1	851	441
52	Warehousing	88	72	15	1	1225	344
53	Waste Collection	7	7	-	-	63	31
54	Water transport	10	10	-	-	58	31

10. CLUSTERS SCENARIO

Following is the list of Clusters in Faridabad & their current status:

Table 9: Mini Clusters in Faridabad

S. No.	Mini Clusters	Location	Cluster Identification	DSR Preparation	DPR Preparation	Implementation
1	Textile Processing Cluster	Faridabad	√	√	√	√
2	Women Knitwear Cluster	Faridabad	√	√	√	

Apart from above mini clusters, Faridabad also has Electroplating Cluster under the MSE-CDP scheme of Govt. of India and DPR has also been prepared by the same.

11. INDUSTRY ASSOCIATIONS

Following is a list of key Industrial Associations in Faridabad.

Table 10: Industry Associations in Faridabad

S. No.	Associations	Name of Presidents/ Chairman	Contact	E-mail
1	Faridabad Industries Association	Sh. Sanjeev Khemka, President	9818899606	fiafbd@gmail.com
2	Faridabad Small Industries Association (FSIA)	Sh. G. S. Tyagi, President	9873802223	gstyagi223@gmail.com
3	Laghu Udyog Bharti, Faridabad	Ravi Bhushan Khatri	9811226385	lub_faridabad@hotmail.com
4	Manufacturer Association, Faridabad	Sh. Ajay Joneja, President	9811014487	maffbd@gmail.com
5	Faridabad Chamber of Commerce and Industries (FCCI)	Sh. H. K. Batra, President	4010920/9910116747	fcci2002@gmail.com harvindkbarta@gmail.com
6	DLF Industries Association, Faridabad	Sh. J. P. Malhotra, President	9810012999	bharatvalves@gmail.com
7	Faridabad IMT Industrial Area Association	Sh. M. L. Sharma President	9910897500	fimtia@gmail.com
8	Haryana Chamber of Commerce & Industries (Faridabad Chapter)	Sh. Ravi Vasudev, Chairman	9818347922	ravivasudev123@gmail.com
9	Integrated Association of Micro Small and Medium Enterprises of India	Sh. Rajiv Chawla, Chairman	9810154568 9711126000	chairman@iamsmeofindia.com

12. KEY ISSUES OF THE INDUSTRIES

- No land has been earmarked by the state govt. for SMEs running in the non-conforming area. Industrial associations have been vocal in their requirement for organized industrial estates for varied sizes and purposes. An industrial survey has been started by Government of Haryana to resolve the problem.

- The power supply in the district is irregular and insufficient. Besides, the power tariff is much higher in Haryana as compared to any part of the country. Voltage fluctuations and frequent power cuts are causing thermal shocks to the plant and machinery of the enterprise. Some big industries slowdown their production or shift their unit to other state to over-come shortage of electric power.

- Common Tool Room and Testing Facilities are not available in Faridabad. Many MSME Units are not able to set up Tool Rooms and Testing facilities independently. It is necessary that Government set up such facilities and they can charge reasonable amount for the service they render.

- Inadequate flow of market information.

- Difficulties in getting bank loans due to cumbersome procedures & lack of awareness.

- Slow technology up-gradation.

- Weak linkages between enterprises and Institutions.

- Low level of labor productivity due to lack of proper training.

- Lack of proper maintenance of the roads.

- There is still scope for widening the demand for products of MSME Units.

13. POTENTIAL AREAS OF INTERVENTION

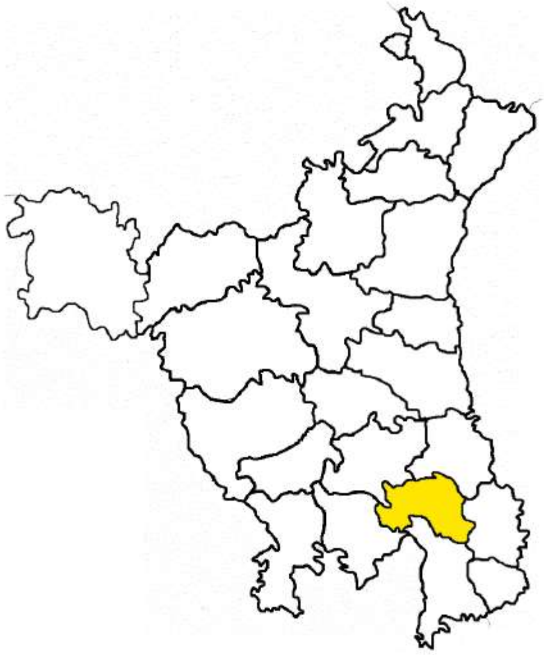
- State Govt. may identify land and set-up new industrial areas especially for Industries currently lying in non-conforming zones.
- A proposal for wholesale market for auto component manufacturers in Faridabad may be initiated to further boost this Industry.
- Regarding power supply issues, Industries & Commerce department can take a lead and coordinate with the electricity distribution companies in Faridabad to form a consumer grievance redressal committee with representation from the Distribution Company, Industries Department & Industry Associations.
- With regard to the demand of Faridabad MSMEs for common tool room & testing facility, the Industries department can expedite the implementation of Quality Marking Centre, Faridabad, the Detailed Project Report of which has already been approved under TIES scheme of Govt. of India.
- With respect to need of Industry for market intelligence/demand identification, Industries department can expedite the setting up of Global Market Intelligence Cell provisioned for in the MSME policy 2019; which would assist MSMEs in finding newer markets for their products.

14. POTENTIAL AREAS OF INVESTMENT

- The manufacturing industry in Faridabad is significantly diversified compared to other districts in Haryana, thereby offering investment opportunities in multiple sectors. Sectors such as 'Machinery & equipment', 'Fabricated metal products', 'Rubber & Plastic products', 'Wearing Apparel', 'Motor Vehicles' have an already well-established MSME base in the district.
- Significant investment opportunity in manufacturing of upstream products which can act as an input for machinery, fabricated metal, auto-component industry in the district.
- Opportunity for investment towards organized marketing/ common display center for the key sectors in the district such as auto-components, metal products etc.

02. Gurugram

District Profile



EXECUTIVE SUMMARY

District Profile

MSME Scenario

02

Gurugram

Famous for....

"Garments & Auto-Components Industry"

1 MSMEs in Gurugram

Total number of MSME units 7,115

New MSME units (last 3 years) 2,461

Wearing Apparel

Food Products

Rubber & Plastic Products

Fabricated Metal Products

Machinery & Equipment

Top 5 sectors – Maximum number of MSMEs

2 Investment Scenario in Gurugram

Total Investment (INR Lakhs) 4,20,879

New Investment (last 3 years; INR Lakhs) 67,655

Rubber & Plastic Products

Motor Vehicles

Textiles

Fabricated Metal Products

Wearing Apparel

Top 5 sectors – Maximum investment by MSMEs

3 Employment Scenario in Gurugram

Total Employment 1,56,624

New Employment (last 3 years) 22,484

Leather & Related Products

Wearing Apparel

Rubber & Plastic Products

Textiles

Motor Vehicles, trailers & semi-trailers

Top 5 sectors – Most employment generated

4 Potential for MSMEs

Food products sector presents an attractive opportunity for further investment in upstream tier 3, tier 2 food processing units which can act as raw material supplier to existing units

Auto-component & Fabricated metal products sectors offer opportunities towards setting up of common display centers, marketing in African, American & European markets

5 Others

Total Exports (FY 18-19; INR Lakhs) 6,23,187

Number of Large & Mega units 47

Existing Clusters 3 Mini Clusters

1. INTRODUCTION

Gurugram was formed as a district of Haryana in August 1979 to include the areas of Gurgaon, Tauru, Nuh, Pataudi, Nagina, Firozepur Jhirka, Punhana, Sohna etc. However, in 2005 certain areas of the district such as Nuh, Firozepur Jhirka etc. were carved out to form the new district of Nuh. Gurugram, also known as 'Millenium City' forms a key part of the National Capital Region of India and is well connected via Metro, Rail, Road & Air to the rest of the country. It's the third largest IT hub of India and houses local offices of many Forbes 500 multinational firms.

1.1 Geography

Gurugram lies towards the south of the Haryana state, and is surrounded by Jhajjar on the north, Uttar Pradesh on north & east, Faridabad on the east, Nuh on south & Rewari on the west. The topography of the region is a mix of rugged hilly terrain of Aravali ranges & alluvial plains.

The climate of Gurugram is mostly hot summers & cold winters with dry air. The district experiences rainfall mostly in monsoon months which account for more than 75% of the total rain fall. Some unreliable rainfall on account of western disturbances is received in the winter months. Only key river in Gurugram is Sahibi river, which is a tributary of Yamuna and originates in the Aravalli range in Rajasthan. Soil found in the district varies from sand to loamy sand in sandy plain areas and silty clay loam in alluvial plains and loamy sand to loam in hills.

1.2 Demographic Profile

As per the census of 2011, total population of Gurugram is 15,14,432 with a population density of 1204 people per sq. KM. The district is largely urbanized & rural to urban percentage distribution is 31.18% & 68.82% respectively. Gurugram has an average literacy rate of 84.70% with male literacy rate of 90.46% and female literacy rate of 77.98%. The district has a lower female to male ratio at 854 females per thousand males, compared to the state average of 877 and significantly lower than the national average of 940.

1.3 Administrative Set-up

Gurugram has a total land area of 1258 Sq. Km. The district has 5 Tehsils (Gurugram, Sohna, Pataudi, Farrukh Nagar, Manesar), 4 Sub-tehsils, 4 blocks, 1 municipal council & 3 municipal committees, 203 Panchayats and around 221 villages.

The following table shows categorization of blocks as per the status of industrial development.

Table 11: **[Gurugram]** Categorization of Blocks

Block A	Block B	Block C	Block D
Gurugram			
Sohna			
Pataudi			
Farukh Nagar			

2. SECTOR WISE MSME LANDSCAPE

Following table shows the total number of MSME units in each sector, in Gurugram, along with the bifurcation of number of micro, small and medium enterprises.

The table also shows number of new units that started their commercial production in the last three financial years.

Table 12: **[Gurugram]** No. of MSME Units in each Sector

S. No.	Industry	Total Units	Micro	Small	Medium	New Units (Last 3 Years)
Food, Beverages & Tobacco						
1	Food products	986	789	190	7	594
2	Beverages	58	34	23	1	36
3	Tobacco	6	5	1	0	5
Textiles & Apparel						
4	Textiles	390	228	146	16	138
5	Wearing apparel	863	569	273	21	50
Leather, Wood & paper						
6	Leather and related products	172	100	63	9	65
7	Wood and products of wood and cork, except furniture; articles of straw and plaiting materials	114	85	29	0	47
8	Paper and paper products	298	182	110	6	107
9	Furniture	162	107	54	1	59
Pharma, Petro-Chemicals, Rubber products						
10	Pharmaceuticals, medicinal chemical and botanical products	112	78	31	3	52
11	Chemicals and	206	146	52	8	93

	chemical products					
12	Coke & Refined Petroleum Products	23	11	10	2	10
13	Rubber and plastics products	433	200	216	17	109
Metals & Mineral Products						
14	Basic metals	144	85	52	7	43
15	Fabricated metal products, except machinery and equipment	550	317	222	11	159
16	Non-metallic mineral products	94	63	30	1	42
Electrical, Electronics & Machinery						
17	Computer, electronic and optical products	239	160	69	10	80
18	Electrical equipment	383	261	114	8	127
19	Machinery and equipment	432	243	180	9	111
Automotive & Auto-Components						
20	Motor vehicles, trailers and semi-trailers	321	149	143	29	81
21	Other Transport Equipment	78	42	32	4	29
Other Manufacturing						
22	Other manufacturing	1051	676	349	26	424

Following scatter diagram shows the comparison between total units in each sector vis-a-vis new units opened in the last 3 financial years.

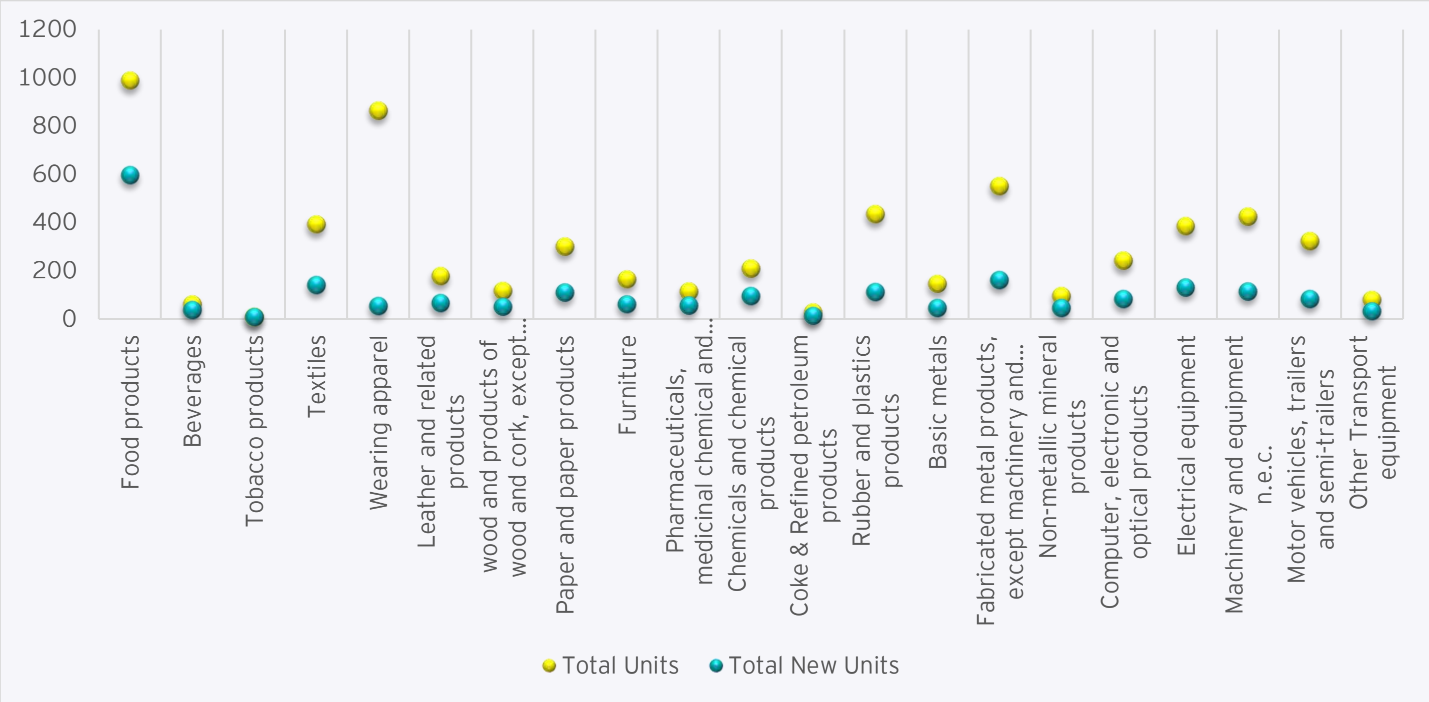


Figure 10: **[Gurugram]** Total Units & New Units in each Sector

2.1 Top 10 Sectors: Based on Number of Units

Following table shows top ten sectors in Gurugram, based upon the total number of MSME units in the district.

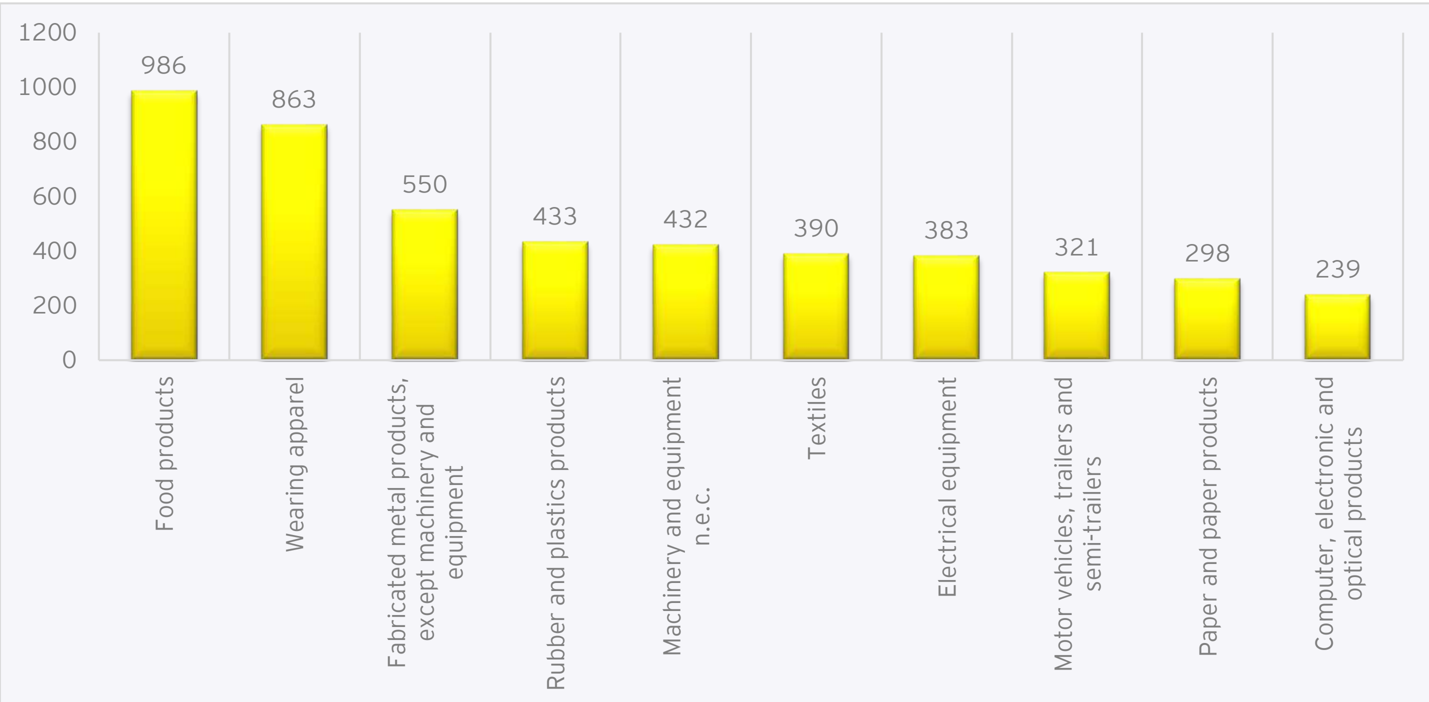


Figure 11: **[Gurugram]** Top 10 sectors - Total No. of MSME Units

2.2 Top 10 Sectors: Based on New Units in Last 3 Years

Following table shows the top ten sectors in Gurugram, based upon number of new MSME units set-up in the last three years.

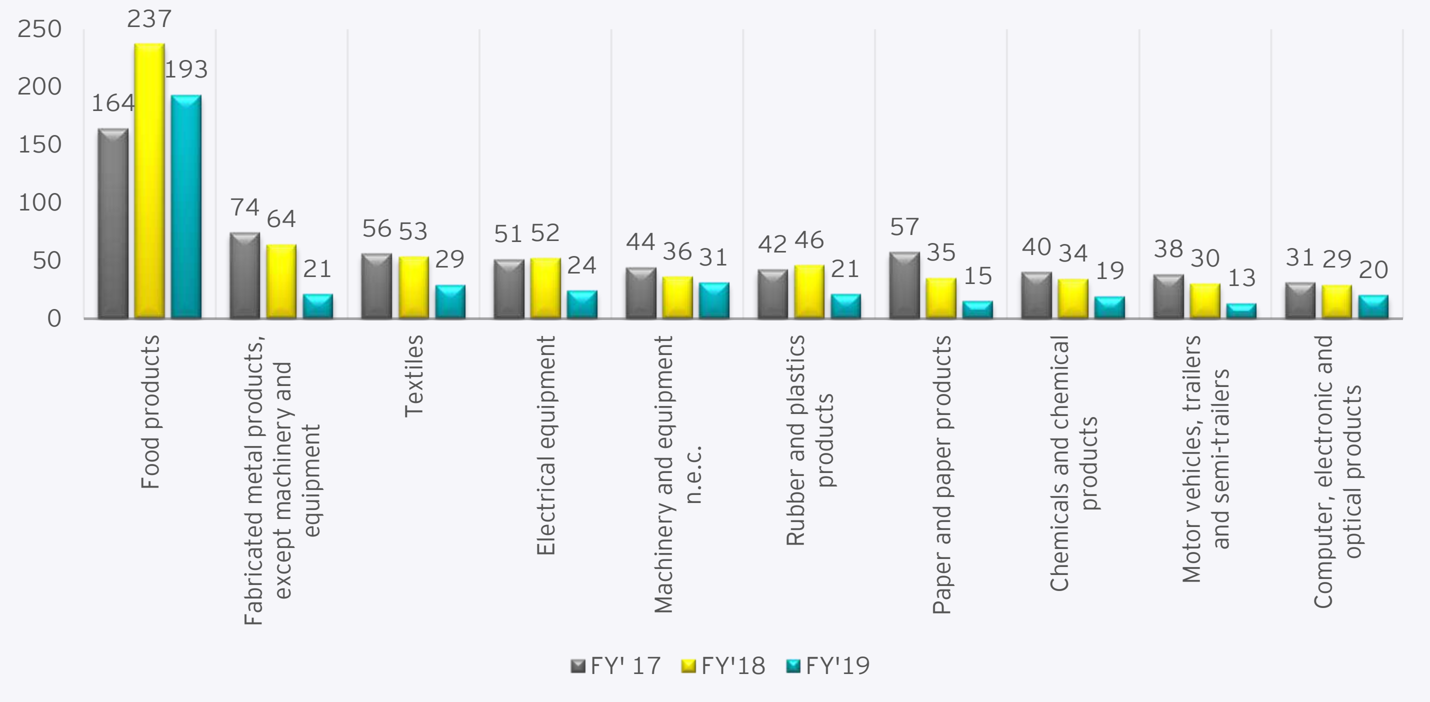


Figure 12: **[Gurugram]** Top 10 Sectors - New Units in Last 3 Years

Key Takeaways

- Maximum no. of MSME units in Gurugram are involved in the food products sector (986), followed by wearing apparel (863).
- Apart from food products & wearing apparel, fabricated metal products, rubber & plastic products, machinery & equipment have significant number of MSMEs operating out of Gurugram.
- In last three years also, food products sector has seen maximum number of new MSME units opened (594), followed by fabricated metal (159) & textiles (138).
- In terms of percentage growth, tobacco products sector has experienced impressive recent growth with 83.33% of the total units having opened up in the last 3 years, followed by beverages products 62.07%.

3. SECTOR WISE INVESTMENT SCENARIO

Punjab National Bank is the convener bank of State Level Bankers' Committee (SLBC) in Haryana. While Syndicate Bank is the district lead bank of Gurugram.

Following table shows the total investment by MSMEs in each sector in Gurugram, along with new investment in the last three financial years (figures are in lakhs).

Table 13: **[Gurugram]** Total Investment by MSMEs

S. No.	Industry	Investment (INR Lakhs)				
		Total Investment	FY'17	FY'18	FY'19	New Investment (Last 3 Years)
Food, Beverages & Tobacco						
1	Food products	12627	1598	2442	1144	5184
2	Beverages	2995	311	333	294	938
3	Tobacco	237	15	3	5	23
Textiles & Apparel						
4	Textiles	33781	3236	1669	1101	6006
5	Wearing apparel	32949	1308	2033	598	3939
Leather, Wood & paper						
6	Leather and related products	15447	253	368	623	1244
7	Wood and products of wood and cork, except furniture; articles of straw and plaiting materials	3303	486	273	64	823
8	Paper and paper products	11501	1495	1385	257	3137
9	Furniture	8120	468	336	148	952
Pharma, Petro-Chemicals, Rubber products						
10	Pharmaceuticals, medicinal chemical and botanical products	6274	460	373	122	955
11	Chemicals and chemical products	13556	1363	508	240	2111
12	Coke & Refined Petroleum Products	2582	0	175	256	431
13	Rubber and plastics products	42108	1321	3051	295	4667
Metals & Mineral Products						
14	Basic metals	11760	1479	1176	117	2772

15	Fabricated metal products, except machinery and equipment	37097	1994	1708	1256	4958
16	Non-metallic mineral products	5225	1455	191	421	2067
Electrical, Electronics & Machinery						
17	Computer, electronic and optical products	15687	728	689	974	2391
18	Electrical equipment	22208	1037	1140	307	2484
19	Machinery and equipment n.e.c.	27786	1053	2287	770	4110
Automotive & Auto-Components						
20	Motor vehicles, trailers and semi-trailers	44605	2342	2231	508	5081
21	Other Transport Equipment	7172	2254	816	160	3230
Other Manufacturing						
22	Other manufacturing	63859	3477	3392	3283	10152

Following scatter diagram shows a comparison of total MSME investment and new investment in the last 3 financial years, across different sectors of Gurugram.

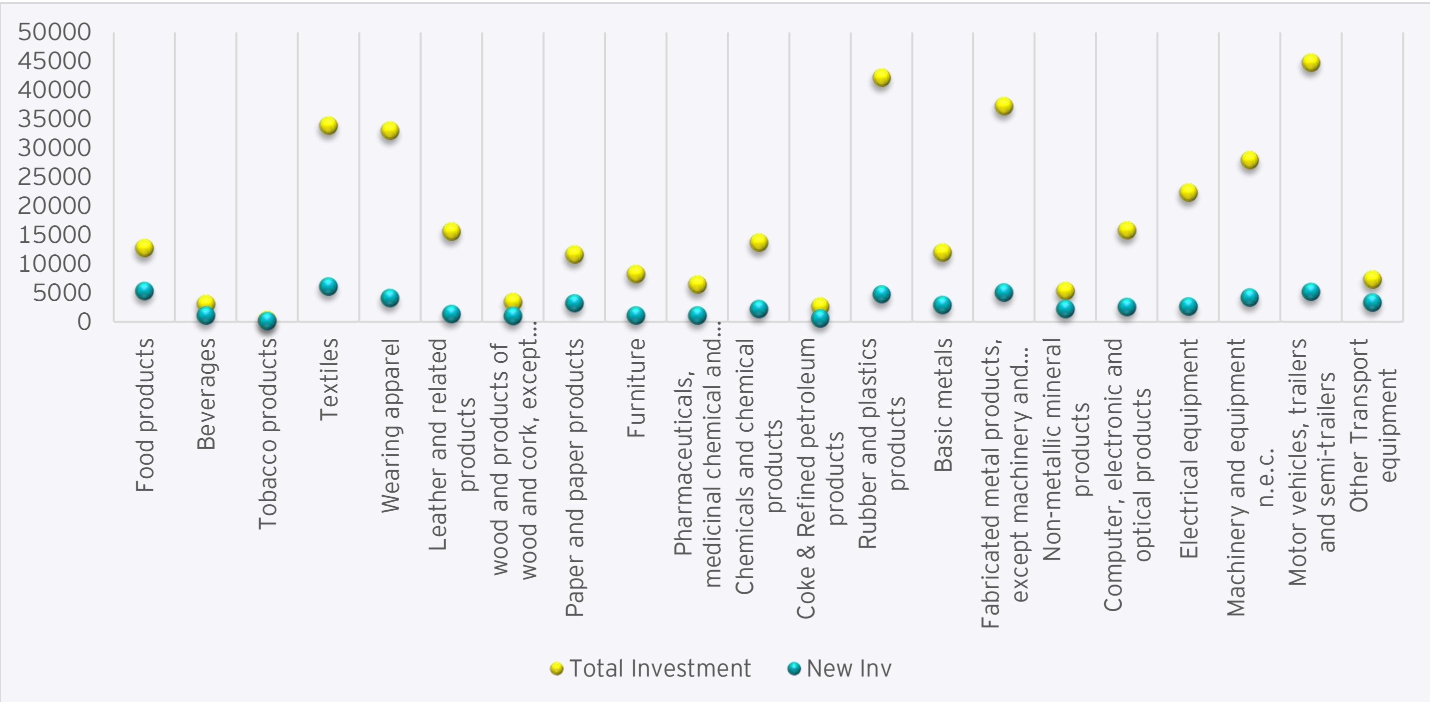


Figure 13: **[Gurugram]** Total Investment & New Investment in Last 3 Financial Years (FY'17-FY'19)

Following pie-chart showcases the sectors that have attracted maximum investments in the last 3 financial years (figures are in Lakhs).

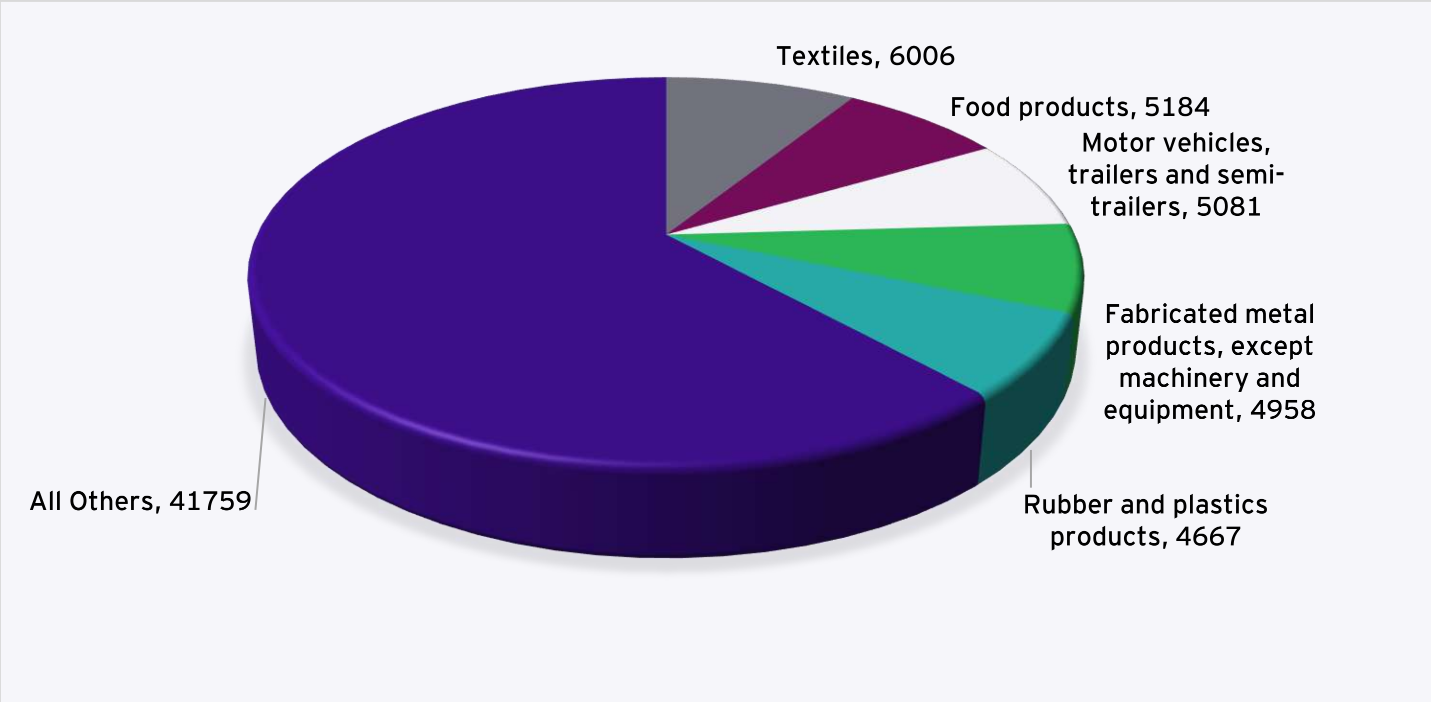


Figure 14: **[Gurugram]** Top 5 Sectors with maximum investment in last 3 Financial Years (FY'17-FY'19)

Following diagram shows a comparison of compound annual growth rate of various sectors for last three financial years.

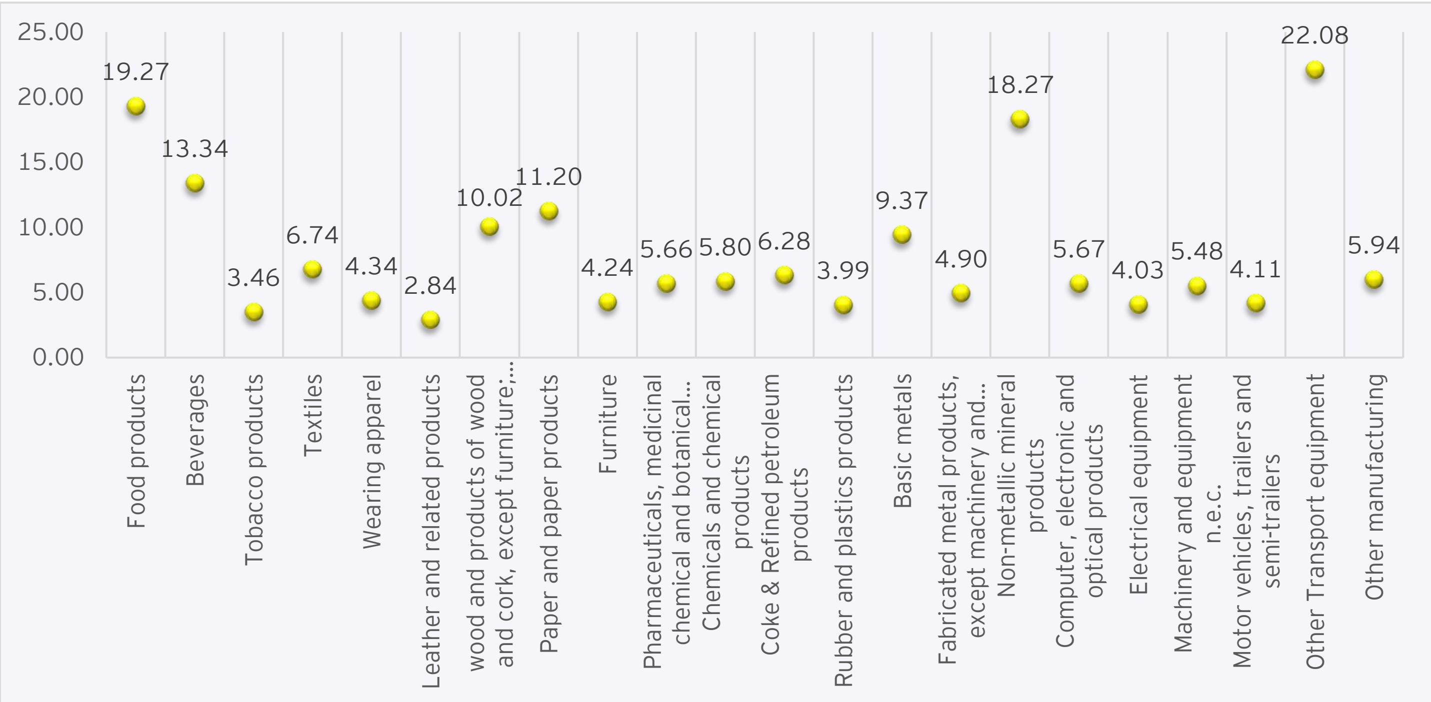


Figure 15: **[Gurugram]** CAGR for Last 3 Financial Years (FY'17-FY'19)

Key Takeaways

- Highest amount of investment by MSMEs in Gurugram has been in motor vehicles, trailers & semi-trailers sector (INR 446.05 Cr), followed by rubber & plastic products sector (INR 421.08 Cr).

- Textile sector in Gurugram has the maximum investment in last three financial years (INR 60.06 Cr) followed by food products sector (INR 51.84 Cr).

- As evident apart from textiles & food products, motor vehicles, fabricated metal products, rubber & plastic products have attracted the maximum investments in last three financial years.

- Sectors with high CAGR in MSME investments are: other transport equipment (22.08%), food products (19.27%), non-metallic minerals (18.27%), beverages (13.34%), paper & paper products (11.20%).

4. SECTOR WISE EMPLOYMENT SCENARIO

Below table showcases the total employment created by MSMEs in each of the sectors, along with new employment created in the last three financial years.

Table 14: **[Gurugram]** Total Employment in each Sector

S. No.	Industry	Total Employment	FY'17	FY'18	FY'19	New Employment (Last 3 Years)
Food, Beverages & Tobacco						
1	Food products	6467	1336	1009	676	3021
2	Beverages	538	144	77	76	297
3	Tobacco	44	6	3	2	11
Textiles & Apparel						
4	Textiles	12918	913	614	437	1964
5	Wearing apparel	28660	1432	1322	540	3294
Leather, Wood & paper						
6	Leather and related products	14531	167	358	73	598
7	Wood and products of wood and cork, except furniture; articles of straw and plaiting materials	1546	170	92	46	308

8	Paper and paper products	2540	550	278	71	899
9	Furniture	3095	186	145	60	391
Pharma, Petro-Chemicals, Rubber products						
10	Pharmaceuticals, medicinal chemical and botanical products	1537	137	107	90	334
11	Chemicals and chemical products	3386	336	212	100	648
12	Coke & Refined Petroleum Products	570	0	66	20	86
13	Rubber and plastics products	11409	465	422	118	1005
Metals & Mineral Products						
14	Basic metals	2529	165	77	86	328
15	Fabricated metal products, except machinery and equipment	10190	614	589	244	1447
16	Non-metallic mineral products	1147	192	86	40	318
Electrical, Electronics & Machinery						
17	Computer, electronic and optical products	6010	253	117	115	485
18	Electrical equipment	7810	339	372	132	843
19	Machinery and equipment	8437	414	702	183	1299
Automotive & Auto-Components						
20	Motor vehicles, trailers and semi-trailers	11010	400	646	84	1130
21	Other Transport Equipment	1834	90	91	50	231
Other Manufacturing						
22	Other manufacturing	20416	1462	916	1169	3547

Following scatter diagram shows a comparison of total employment across different MSME sectors and new employment generated in the last 3 financial years (except for wearing apparel sector with total employment of '28660' and new employment of '3294', which being an outlier cannot be represented with other sectors).

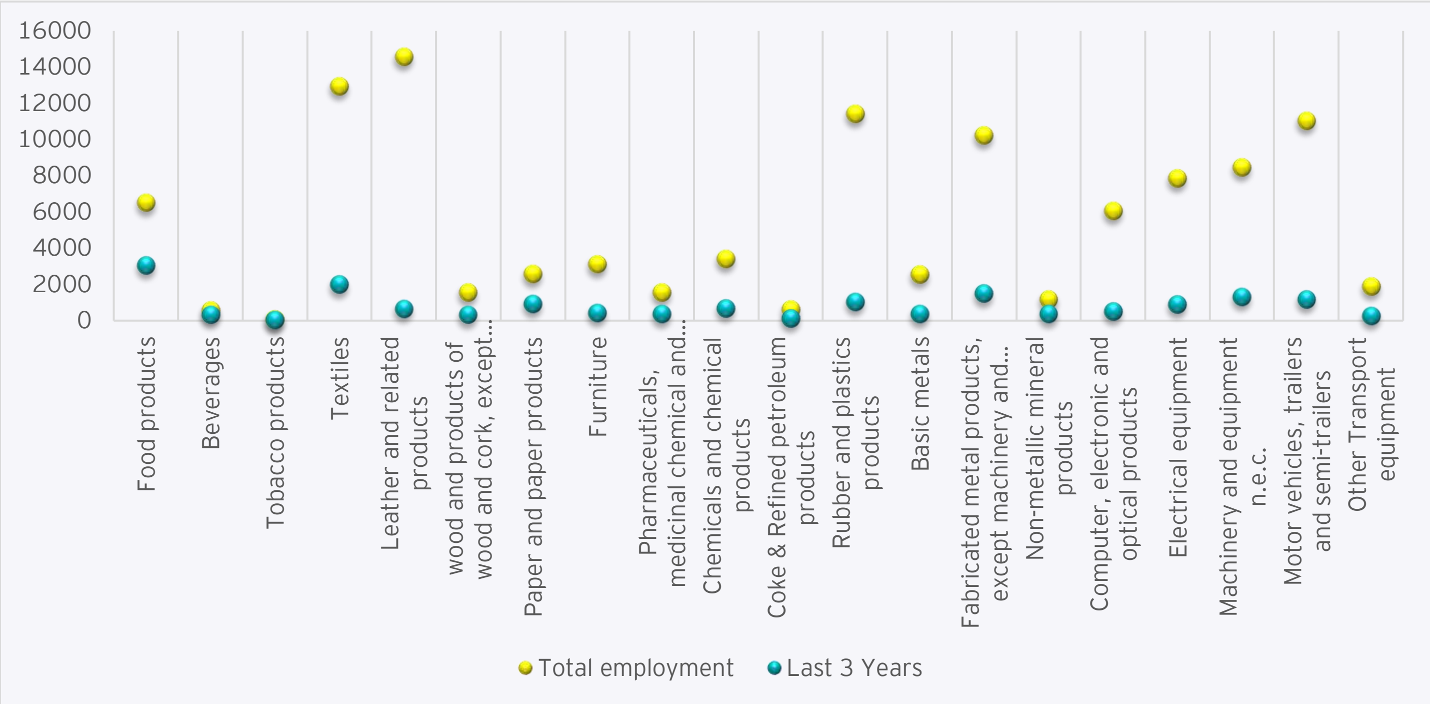


Figure 16: **[Gurugram]** Total Employment & New employment in last 3 Financial Years (FY'17-FY'19)

Following bar chart showcases category wise per unit employment analysis for MSMEs in Gurugram.

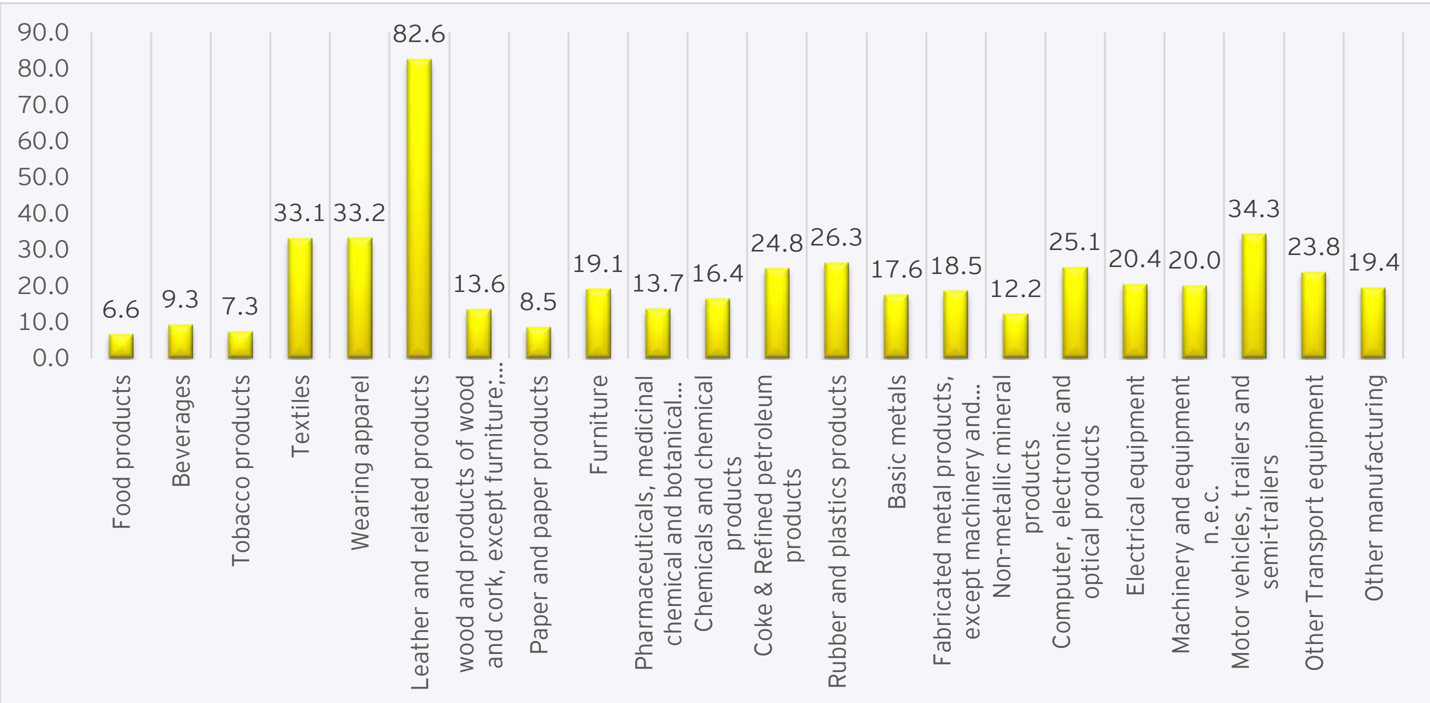


Figure 17: **[Gurugram]** Category wise employment intensity

Following pie-charts showcase the sectors that have created maximum employment in each of the last 3 financial years.

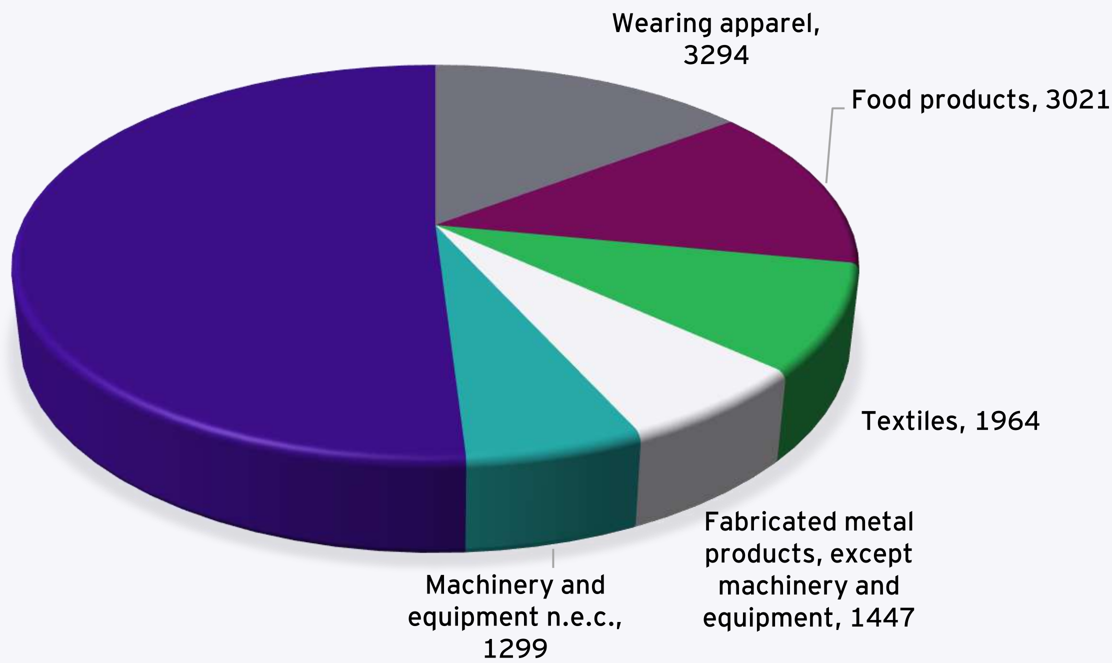


Figure 18: **[Gurugram]** Top 5 Sectors with maximum new employment in last 3 Financial Years (FY'17-FY'19)

Key Takeaways

- Wearing apparel sector provides the maximum employment (28,660) followed by leather & related products sector (14,531) & textile products sector (12,918).

- Apart from wearing apparel (3,294) & food products (3,021), textiles products sector has created the maximum new employment in last 3 years (1964), followed by metal products (1447) and machinery & equipment (1299). Sectors such as other transport equipment, coke & refined petroleum products, tobacco products have experienced relatively low growth in new employment.

- Leather & related products have maximum employment intensity with an average of 82.6 employees per unit, followed by motor vehicles sector with 34.3 employees per unit and wearing apparel products at 33.2 employees per unit.

- Food products sector has the least employment intensity with only 6.6 employees per unit, followed by tobacco products at 7.3 employees per unit and paper & paper products at 8.5 employees per unit.

5. EXPORTS FROM THE DISTRICT

The key exports product from Gurugram is automobile & auto-components **with INR 3929.87 Cr** worth of exports in FY'19. Other key categories include wearing apparel & leather products. Following table shows some of the exports from Gurugram for last 3 FYs.

(The export data in the table shows only exports related information that is available at the District Industries Centre, Gurugram, and actual exports figure might be significantly higher).

Table 15: Exports from Gurugram

S. No.	Industry	Exports (INR Lakhs)		
		FY'17	FY'18	FY'19
1	Electrical equipment	6021	3244	3467
2	Leather Products	100090	11555	15010
3	Machinery and equipment	6550	14799	4952
4	Motor Vehicles & components	7262	311320	392987
5	Pharmaceuticals	-	-	1910
6	Rubber and Plastic Products	3909	2778	960
7	Wearing Apparel	46288	21902	23028

6. NATURAL RESOURCES & RAW MATERIAL AVAILABLE

Raw materials available in Gurugram include china clay, quarts/silica sand, quartzite, slate etc. apart from generic minerals such as brick earth & ordinary clay which are found across Haryana. Especially slate found in Gurugram is said to be of good quality & quartzite is available in large quantities in Aravalli ranges.

Gurugram-Nuh combined region has a total forest cover of around 231 sq. km which makes around 8.4 % of the total geographical area.

Key Agricultural produce of the district include Wheat, barley, millets, rice, lentils & beans, cotton etc. The district is relatively less cultivated in the Kharif season owing to lack of rains, desert terrain & poor quality of ground water.

7. KEY INDUSTRIAL ESTATES

The key industrial areas in Gurugram are Udyog Vihar, Gurugram which has units operating in sectors such as IT & ITES sectors, Garments & Auto ancillary etc. and Industrial Model Township in Manesar which is primarily an automobile & auto-components hub.

The details of these Industrial Estates are as under:

Udyog Vihar, Gurugram

Total number of Plots	2023
Allotted Plots	1855
Un allotted Plots	168
Units in Production	1249
Percentage of plots allotted	91.6%

Industrial Model Township, Manesar, Gurugram

Total number of Plots	2186
Allotted Plots	2076
Un allotted Plots	70
Units in Production	1316
Percentage of plots allotted	94.96%

8. MAJOR LARGE-SCALE UNITS

Apart from MSMEs, Gurugram has a significant number of Large & Mega enterprises operational in various sectors. Below table showcases number of Large & Mega enterprises in each sector along with their names.

Table 16: **[Gurugram]** Large & Mega Units in each Sector

S. No.	Industry	Large & Mega Industries
1	Textiles	• M/S ORIENT FASHION EXPORTS INDIA PVT. LTD. • AFFLATUS INTERNATIONAL • M/S MYTEL LIMITED • M/S R. R. KHANNA & CO. OVERSEAS • P. R. GARTEX PVT. LTD. • RICHA GLOBAL EXPORTS PVT. LTD. • M/S PEARL GLOBAL LTD. • M/S ORIENT FASHION EXPORTS INDIA PVT. LTD. • M/S SPRING OVERSEAS PVT. LTD. • M/S ROLEX HOSIERY PVT. LTD. • M/S I.I.I. FASHION PVT. LTD. • M/S USHA FABS PVT. LTD. • M/S SPARK

2	Paper & Paper Products	• M/s Usha Diaries • M/S SGM PAPER PRODUCTS 183
3	Pharma	• ALERE MEDICAL PVT. LTD.
4	Chemicals and chemical products	• NTF INDIA PVT. LTD.
5	Rubber and plastics products	• M/S ENKAY LATEX PRODUCTS LTD. • M/S ROOP POLYMERS LTD. • M/S KAMAL RUBPLAST INDS. PVT. LTD. • M/S NS ANTIVIBRATION PRODUCTS PVT. LTD. • M/S PARADISE PLASTIC ENTERPRISES LTD.
6	Basic Metals	• M/S RICO CASTINGS LTD.
7	Fabricated Metal Products	• M/S MULTICOLOR STEEL INDIA PVT. LTD.
8	Computer, Electronic & Optical Products	• CONSULTING ENGINEERING SERVICES INDIA LIMITED • M/S FATEH COMPUTER SERVICES (P) LTD. • M/S KHAJRANA GANESH PROPERTIES PVT. LTD. • STERLING INVESTMENT CO. PVT. LTD • ARKAY ELECTRONICS • AMPLUS ENERGIES GURGAON • M/S AZA INFRA ENGINEERING LIMITED
9	Electrical Equipment	• M/S VINEY CORPORATION PVT. LTD.
10	Machinery and equipment n.e.c.	• M/S AZA INFRA ENGINEERING LIMITED • SAMTUL EXPORTS • M/S FRIGOGLASS INDIA PVT. LTD.
11	Motor Vehicles, trailers & semi-trailers	• M/s Sogefi MNR Engine Systems • SIGMA CORPORATION INDIA PVT. LTD. • PARICOL COMPONENTS IMT MANESAR GURGAON • SIGMA CORPORATION INDIA PVT. LTD. • FCC CLUTCH INDIA PVT. LTD • M/S EUROPEON MOTOR WORKS PVT. LTD. • M/S BOSCH CHASSIS SYSTEMS INDIA LTD. • M/S AUTOTECH ANCILLERIES LTD. • M/S KRISHAN MARUTI LTD. • M/S KALYANI THERMAI SYSTEMS LTD. • M/S SUZUKI MOTOR CYCLE INDIA PVT. LTD.
12	Other Transport Equipment	• M/S CARRIER REFIGERATION P. LTD

9. SERVICES SECTOR SNAPSHOT

Gurugram has significant number of MSMEs operating in the services sector also.

Below table gives a snapshot of the services sector in Gurugram:

Table 17: **[Gurugram]** Services Sector Snapshot

S. No.	Industry	Total Units	Micro	Small	Medium	Total Investment (INR Lakhs)	Total employment
1	Civil Engineering	70	34	33	3	3480	1147
2	Construction of building	78	49	29	0	1345	995
3	Electricity, gas, steam and air conditioning supply	52	38	14	0	686	548
4	Office administrative, office support and other business support activities	614	482	126	6	9261	15659
5	Other professional, scientific and technical activities	877	649	209	19	19023	10545
6	Repair and installation of machinery and equipment	157	117	37	3	3032	1419
7	Specialized construction activities	163	116	44	3	4017	2123
8	Architecture and engineering activities; technical testing and analysis	225	151	71	3	4782	4209
9	Financial service activities, except insurance and pension funding	121	107	14	0	1305	1680
10	Food and beverage service activities	929	740	182	7	11875	5889
11	Mining support service activities	3	1	1	1	332	40

10. CLUSTERS SCENARIO

Gurugram currently has three clusters under the Haryana State Mini Cluster Development scheme at various stages of implementation. Details are as under:

Table 18: Mini Clusters in Gurugram

S. No.	Cluster	Location	Cluster Identification	DSR Preparation	DPR Preparation	Implementation
1	Decorative Lighting Cluster	Gurugram	√	√	√	√
2	Light Engineering Cluster	Gurugram	√	√	√	√
3	Apparel Cluster	Gurugram	√	√	√	√

Decorative lighting cluster is already operational, and a grant of INR 178.92 Lakhs has been released for the cluster. Light engineering cluster is currently at machinery procurement stage and a grant of INR 90 lakhs has been released for the same. Apparel cluster is currently at tendering stage.

11. INDUSTRY ASSOCIATIONS

Following is the list of Industry Associations in Gurugram:

Table 19: Industry Associations in Gurugram

S. No.	Name	Name of the President	Address	Email	Contact
1	Gurgaon Industrial Association	Mr. V. P. Bajay	GIA House, GIA Marg, Opp. Sec-14 IDC Mehrauli Road, Gurugram	info@giaonline.in	9810017370, 9810035500
2	Gurgaon Chamber of Commerce & Industry	Mr. Vikas Jain	Post box no-2 Khandsa Road Gurugram	gcci@gurgaonchamber.org	98111409.06
3	Gurgaon Udyog association Gurgaon	Mr. Praveen Yadav	785 Ph-V Udyog Vihar Gurugram.	gua785@gmail.com	9810131796, 9811093732
4	Manesar Industrial Welfare Association	Mr. Manoj	Plot No 69, Sec-3 IMT Manesar Gurugram	Maneasr.miwa@gmail.com	9891142017, 9811060126
5	Udyog Vihar Industries	Dr. Animesh	B-40 Udyog Vihar Ph-V Gurugram	uvia.gurgaon@gmail.com	9971780833, 9810119435

	Association	Saxena			
6	NCR Chamber of Commerce & Industry	Mr. H. P. Yadav	B-604 Sushant Lok, Phase-1, Near Max hospital, Gurugram	ncci@nccionline.org	8800966330, 9871096333
7	Chamber of Industries Udyog Vihar	Mr. Manoj	283 Udyog Vihar, Gurugram	chamberofindustries@gmail.com	9810296701
8	IMT Industrial Association	Mr. Pawan Yadav	Plot No. 395 A, sector 8, IMT, Manesar	imt_industrial_association@yahoo.com, m_tyagi26@gmail.com, m_tyagi26@Yahoo.co.in, aakritibuilders380@gmail.com	9999990020, 9811261318
9	Haryana Industrial Association	Mr. Rakesh Gupta	388 Ph-V Gurugram	kapoortoy@yahoo.in, g.rakesh32@yahoo.com	9811261001, 9891175481
10	Haryana Environmental Management Society	Mr. Pawan Kumar	Behrampur Road, Khandsa, Gurgaon	hems_hry@airtelmail.in	9891220047
11	Daultabad Road Industries Association	Mr. Pawan Kumar Jindal	K. No. 88/278, Daultabad road, Daultabad Gurugram - 122006	Balajiint7@gmail.com, daultabadindassociation@gmail.com	9811116284, 9810249705
12	Textile Manufacturers Association	Mr. Anil Jain	Gurugram	tma@textilemanufacturer.org, officeaniljain@rcvelvet.co	9811061098

12. KEY ISSUES OF THE INDUSTRIES

Some of the key issues raised by the various industry associations in Gurugram are:

- Difficulties faced by MSMEs in getting loans from banks owing to various hassles in the process & large number of documents required to prove credit worthiness.
- MSME's face the issue of low profitability owing to high production costs because of difficulties faced in procuring raw materials & hiring skilled workforce.
- Lack of awareness and access to advanced technologies leading to MSMEs generally relying on outdated production methods especially in fabricated metal & textile sectors.
- MSMEs generally lack the know-how of Innovative ways of marketing such as digital marketing & effective branding, promotion techniques leading to lost sales opportunities.
- Low clarity among MSMEs about labor laws & regulation leading to unnecessary red tape & hassles.
- Irregular power supply, non-delivery of bills & limited time period for payment of bills.

13. POTENTIAL AREAS OF INTERVENTION

- Access to Finance for MSMEs needs to be raised in the State Level Bankers Committee of Haryana with a focus upon digitalization of loan approval process & documentation requirements.
- Cluster based common procurement of raw materials for MSMEs can reduce the hassles faced by individual units and give greater negotiating power to MSMEs owing to larger orders.
- Common facility centers with required advanced technology which MSME's cannot individually afford may be set up especially for Textile & Fabricated Metal sectors.
- DIC Gurugram can hold seminars/workshops to enhance the awareness of MSMEs on Labor Laws, Govt. schemes, Innovative Sales & Marketing techniques etc.

- An effective online mechanism to address all power/utilities-based grievances needs to be initiated.

14. POTENTIAL AREAS OF INVESTMENT

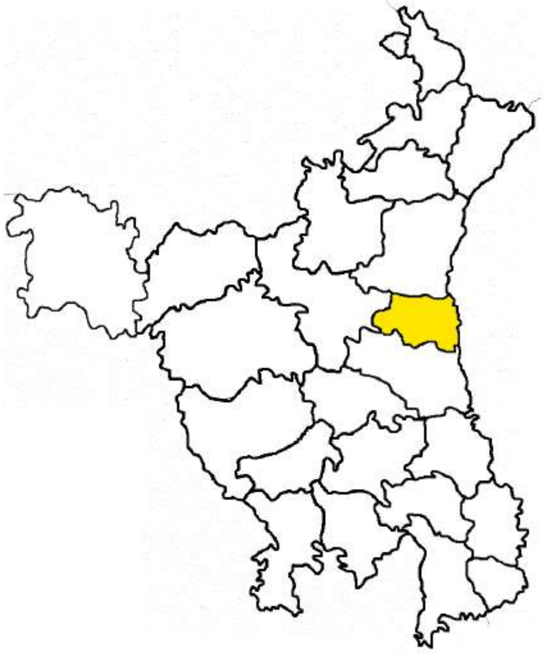
- Given a well-developed food products sector in Gurugram with close to a thousand operational MSMEs, the sector presents an attractive opportunity for further investment in upstream tier 3, tier 2 food processing units which can act as raw material suppliers to these units.

- Wearing Apparel sector also presents attractive business opportunities in Design, branding & marketing related linkages.

- Fabricated metal products also being a key sector in the district offers opportunities towards setting up of common display centers, marketing in African, American & European markets.

03. Panipat

District Profile



EXECUTIVE SUMMARY

District Profile
MSME Scenario

03
Panipat

Famous for....
"Textile & Handloom Industry"

1 MSMEs in Panipat

Total number of MSME units **5,367**

New MSME units (last 3 years) **1,392**

- Textile
- Food Products
- Wearing Apparel
- Machinery & Equipment
- Chemicals & Chemical Products

Top 5 sectors – Maximum number of MSMEs

2 Investment Scenario in Panipat

Total Investment (INR Lakhs) **2,12,959**

New Investment (last 3 years; INR Lakhs) **25,027**

- Textiles
- Food Products
- Rubber & Plastic Products
- Wearing Apparel
- Chemicals & Chemical Products

Top 5 sectors – Maximum investment by MSMEs

3 Employment Scenario in Panipat

Total Employment **52,851**

New Employment (last 3 years) **9,332**

- Textiles
- Wearing Apparel
- Machinery & Equipment
- Food Products
- Rubber & Plastic Products

Top 5 sectors – Most employment generated

4 Potential for MSMEs

Textile sector presents attractive opportunities in investment towards product diversification, higher value chain products such as technical textiles/smart textiles etc.

Significant opportunity for growth in ancillary sectors such as Wearing Apparel, with investment towards design centers, stitching facilities & retail stores

5 Others

Total Exports (FY 18-19; INR Lakhs) **8,97,102**

Number of Large & Mega units **26**

Existing Clusters **1 Mini-Cluster**
1 MSE-CDP Cluster

1. INTRODUCTION

Panipat, earlier a part of district Karnal, was carved out as a separate district in November 1989. The district has a pivotal place in the history of Indian subcontinent, being the site for three crucial battles which proved to be the key turning points in the country's history. The district is located on the Ambala-Delhi stretch of National Highway 44 and is well connected to other neighboring north Indian states. Panipat is one of the major hubs in the world for textile industry products and is known as "Textile City".

1.1 Geography

Panipat lies in the central-eastern part of the Haryana state, and is surrounded by Karnal on the north, Sonipat on the south, Jind on the west & Uttar Pradesh on the east. The district lies along the Yamuna river alluvial plains with slopes mostly from west to east.

Panipat has mostly dry air, hot summer & cold winter with January being the coldest month and May & June being the hottest months. The district receives more than 80% of its rainfall in the monsoon months of July to September. The river Yamuna defines the eastern boundary of the district with Uttar Pradesh.

Soil types found in the district can be defined as sandy loam /clay loam in plains and loam to lose clay loam in river basins.

1.2 Demographic Profile

As per the census of 2011, total population of Panipat is 12,05,437 persons with a population density of 763 per sq. km. It constitutes approximately 4.75% of total Haryana population. Rural to urban percentage distribution is 53.95% & 46.05% respectively. Average literacy rate of Panipat is 75.94% with a male literacy rate of 83.71% and female literacy rate of 67%. The district has a female to male ratio at 864 females per thousand males, which is lower than the state average of 877 and significantly lesser than the national average of 940. Population growth for Panipat for the decade 2001-2011 is 24.60%.

1.3 Administrative Set-up

Panipat has a total land area of 1268 Sq. Km. The district has five tehsils namely Panipat, Samalkha, Israna, Bapoli and Madlauda. Panipat also has 2 sub-divisions, 4 assembly constituencies, 6 blocks and 198 Revenue villages.

The following table shows categorization of blocks as per the status of industrial development.

Table 20: **[Panipat]** Categorization of Blocks

Block A	Block B	Block C	Block D
Panipat	Samalkha	Israna	
		Madlauda & HSIIDC, Indl. Estate Near Refinery Panipat	
		Bapauli	
		Sanauli Khurd	

2. SECTOR WISE MSME LANDSCAPE

Following table shows the total number of MSME units in each sector, in Panipat, along with the bifurcation of number of micro, small and medium enterprises.

The table also shows number of new units that started their commercial production in the last three financial years.

Table 21: **[Panipat]** No. of MSME Units in each Sector

S. No.	Industry	Total Units	Micro	Small	Medium	New Units (Last 3 Years)
Food, Beverages & Tobacco						
1	Food products	351	310	37	4	110
2	Beverages	15	15	0	0	1
3	Tobacco	2	1	1	0	0
Textiles & Apparel						
4	Textiles	3373	2573	729	71	777
5	Wearing apparel	268	250	17	1	91
Leather, Wood & paper						
6	Leather and related products	40	37	2	1	11
7	Wood and products of wood and cork, except furniture; articles of straw and plaiting materials	72	69	3	0	18
8	Paper and paper products	65	52	13	0	24
9	Furniture	53	50	3	0	21
Pharma, Petro-Chemicals, Rubber products						
10	Pharmaceuticals, medicinal chemical and botanical products	33	28	5	0	9

11	Chemicals and chemical products	116	104	10	2	39
12	Coke & Refined Petroleum Products	10	7	3	0	2
13	Rubber and plastics products	103	65	36	2	31
Metals & Mineral Products						
14	Basic metals	34	25	8	1	8
15	Fabricated metal products, except machinery and equipment	86	74	12	0	29
16	Non-metallic mineral products	47	39	8	0	16
Electrical, Electronics & Machinery						
17	Computer, electronic and optical products	17	15	2	0	8
18	Electrical equipment	72	61	10	1	19
19	Machinery and equipment	153	135	18	0	31
Automotive & Auto-Components						
20	Motor vehicles, trailers and semi-trailers	13	11	2	0	4
21	Other Transport Equipment	23	19	4	0	10
Other Manufacturing						
22	Other manufacturing	421	374	47	0	133

Following scatter diagram shows the comparison between total units in each sector vis-a-vis new units opened in the last 3 financial years (except textile sector, which with 3373 total units & 777 new units cannot be represented in the same graph).

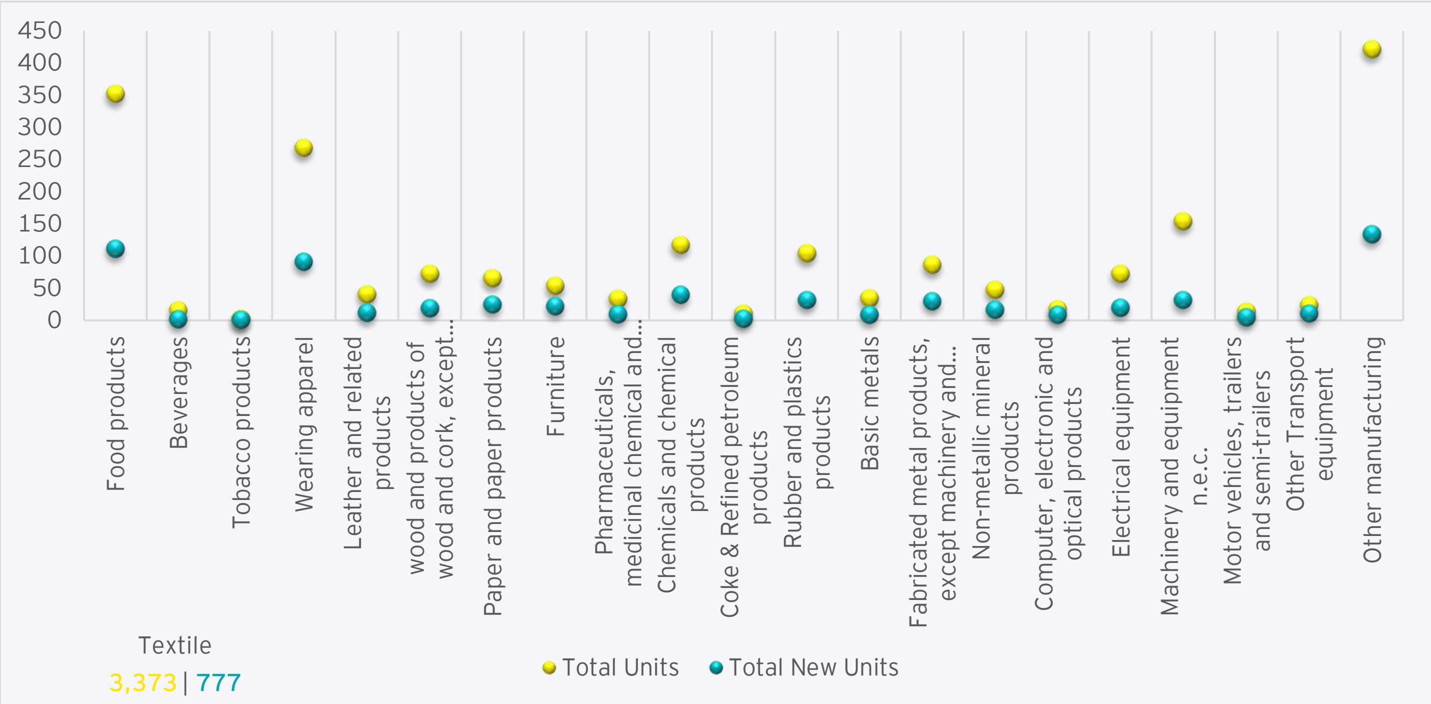


Figure 19: **[Panipat]** Total Units & New Units in each Sector

2.1 Top 10 Sectors: Based on Number of Units

Following table shows top ten sectors in Panipat, based upon the total number of MSME units in the district.

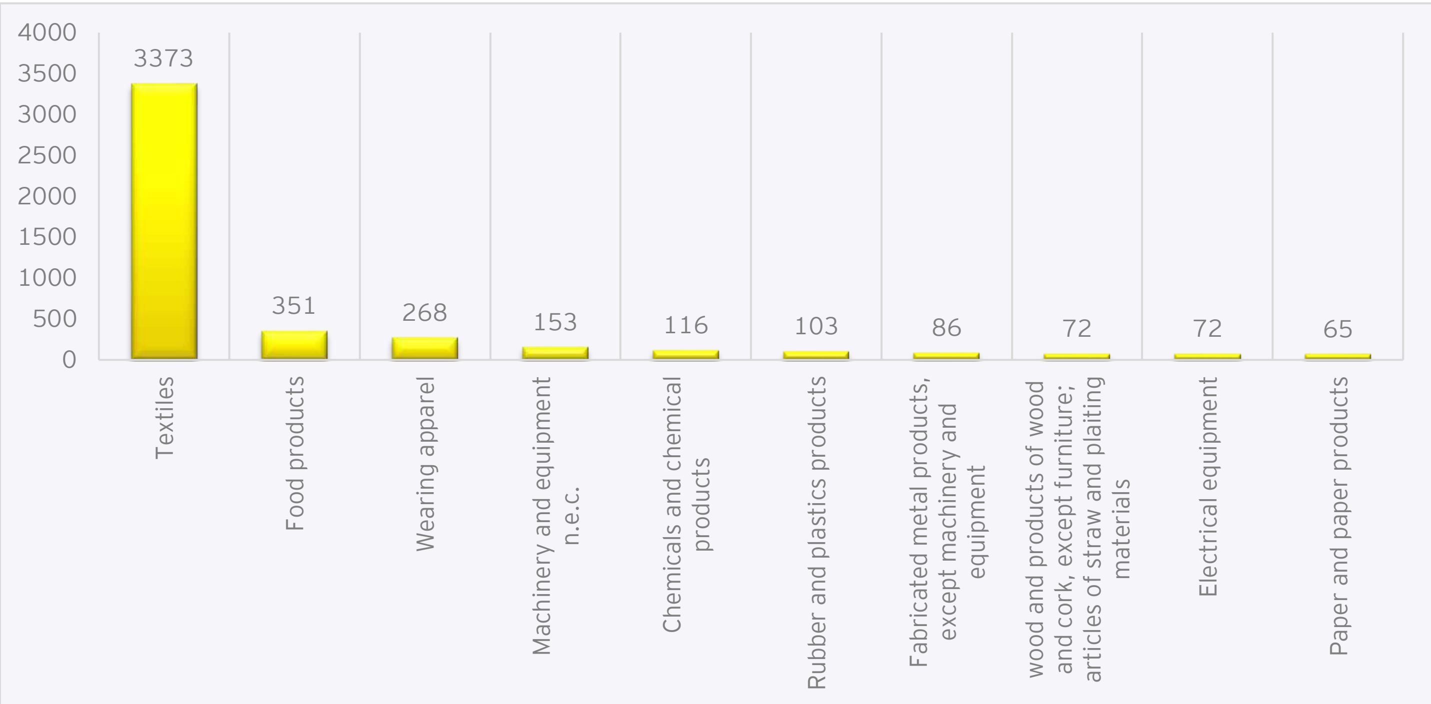


Figure 20: **[Panipat]** Top 10 sectors - Total No. of MSME Units

2.2 Top 10 Sectors: Based on New Units in Last 3 Years

Following table shows the top ten sectors in Panipat, based upon number of new MSME units set-up in the last three years.

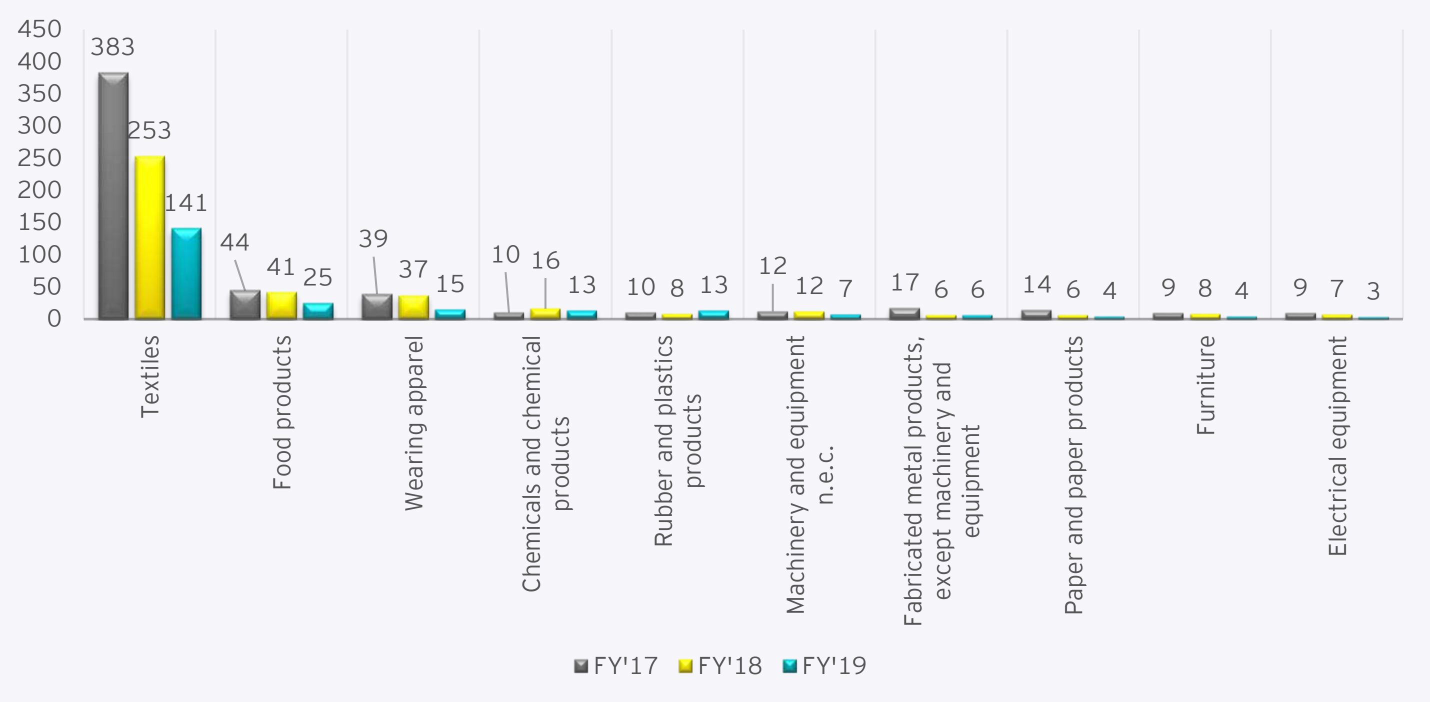


Figure 21: **[Panipat]** Top 10 Sectors - New Units in Last 3 Years

Key Takeaways

- Maximum no. of MSME units in Panipat are involved in the textile sector, followed by food products.
- Apart from textile & food Products, wearing apparel, machinery & equipment, chemical & chemical products have significant number of MSMEs operating out of Panipat.
- In last three years also, textile sector has seen maximum number of new MSME units opened (777), followed by food products (110) & wearing apparel (91).
- In terms of percentage growth, 'Computer, electronic & optical products' has experienced impressive recent growth with 47.06% of the total units having opened up in the last 3 years, followed by furniture (39.62%) & paper and paper products (36.92%).

3. SECTOR WISE INVESTMENT SCENARIO

Punjab National Bank is the convener bank of State Level Bankers' Committee (SLBC) in Haryana and also the district lead bank of Panipat.

Following table shows the total investment by MSMEs in each sector in Panipat, along with new investment in the last three financial years (figures are in Lakhs).

Table 22: **[Panipat]** Total Investment by MSMEs

S. No.	Industry	Investment (INR Lakhs)				
		Total Investment	FY'17	FY'18	FY'19	New Investment (Last 3 Years)
Food, Beverages & Tobacco						
1	Food products	9496	518	424	661	1603
2	Beverages	360	0	1	0	1
3	Tobacco	76	0	0	0	0
Textiles & Apparel						
4	Textiles	167729	9950	2687	4226	16863
5	Wearing apparel	3995	215	336	95	646
Leather, Wood & paper						
6	Leather and related products	1143	10	1	29	40
7	Wood and products of wood and cork, except furniture; articles of straw and plaiting materials	776	137	3	2	142
8	Paper and paper products	1498	136	111	113	360
9	Furniture	378	60	48	53	161
Pharma, Petro-Chemicals, Rubber products						
10	Pharmaceuticals, medicinal chemical and botanical products	610	31	1	31	63
11	Chemicals and chemical products	3101	165	103	73	341
12	Coke & Refined Petroleum Products	232	25	5	0	30
13	Rubber and plastics products	6962	429	209	340	978
Metals & Mineral Products						
14	Basic metals	1599	28	3	62	93

15	Fabricated metal products, except machinery and equipment	2497	932	73	13	1018
16	Non-metallic mineral products	790	36	115	29	180
Electrical, Electronics & Machinery						
17	Computer, electronic and optical products	144	3	39	8	50
18	Electrical equipment	1667	97	48	12	157
19	Machinery and equipment	2406	132	141	36	309
Automotive & Auto-Components						
20	Motor vehicles, trailers and semi-trailers	188	0	5	122	127
21	Other Transport Equipment	303	7	7	145	159
Other Manufacturing						
22	Other manufacturing	7009	1226	300	180	1706

Following scatter diagram shows a comparison of total MSME investment and new investment in the last 3 financial years, across different sectors of Panipat (except Textile sector which being a clear outlier has not been depicted in the graph).

Figure 22: **[Panipat]** Total Investment & New Investment in Last 3 Financial Years (FY'17-FY'19)

Following pie-chart showcases the sectors that have attracted maximum investments in the last 3 financial years (figures are in lakhs).

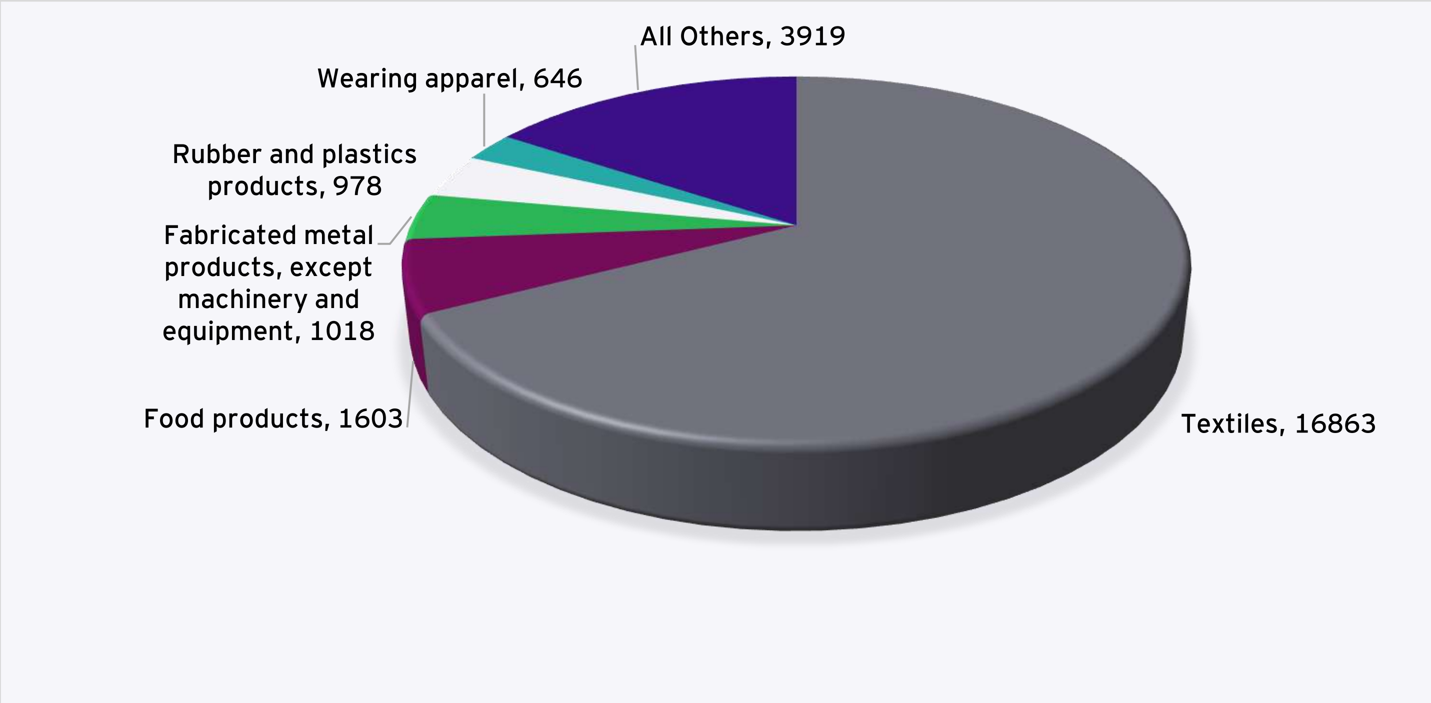


Figure 23: **[Panipat]** Top 5 Sectors with maximum investment in last 3 Financial Years (FY'17-FY'19)

Following diagram shows a comparison of compound annual growth rate of various sectors for last three financial years.

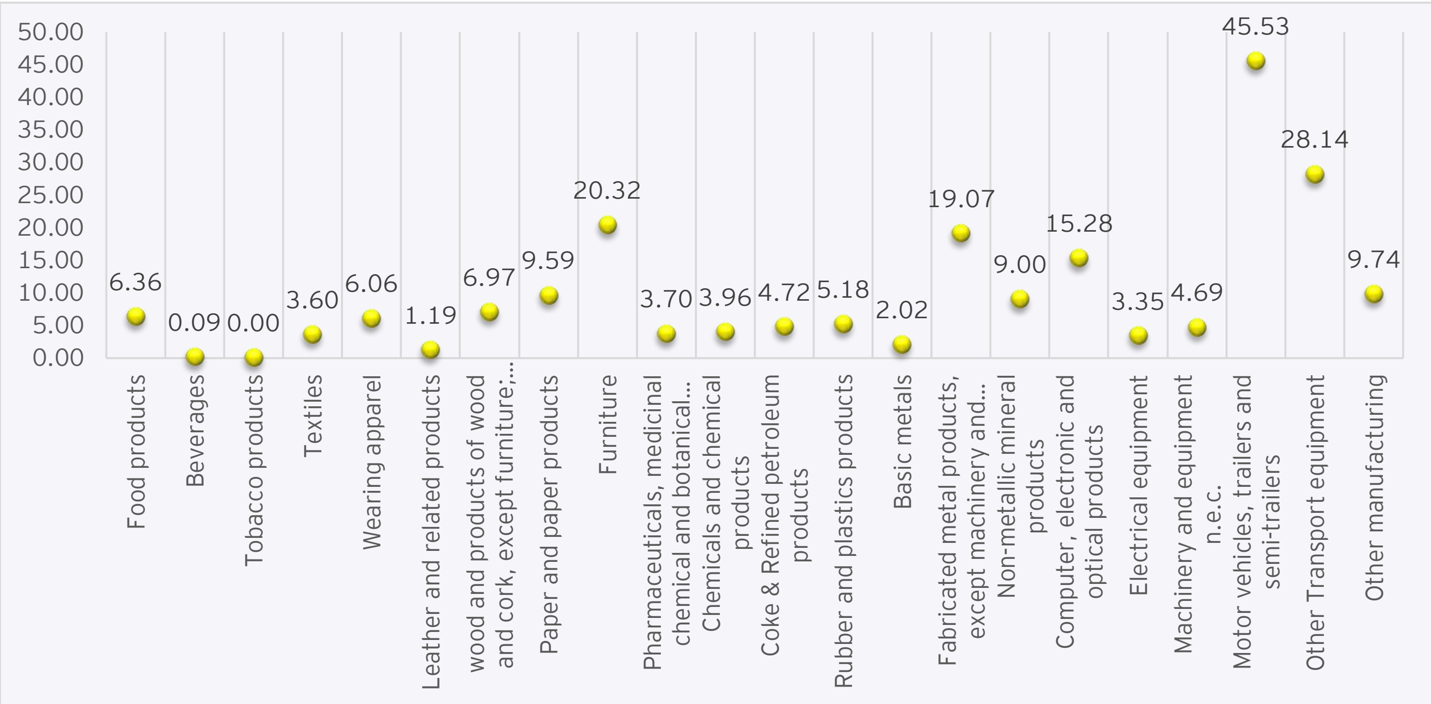


Figure 24: **[Panipat]** CAGR for Last 3 Financial Years (FY'17-FY'19)

Key Takeaways

- Highest amount of investment by MSMEs in Panipat has been in textile sector (INR 1677.29 Cr) followed by food products sector (INR 94.96 Cr).

- Apart from having the highest total investment, textile sector has also experienced highest new investment in the last three financial years at INR 168.63 Cr followed by food products sector INR 16.03 Cr.

- As evident apart from textiles, food products, fabricated metal products, rubber & plastic products, wearing apparel have attracted the maximum investments in last three financial years.

- Sectors with high CAGR in MSME investments in last 3 FYS are: motor vehicles, trailers & semi-trailers (45.53%), other transport equipment (28.14%), furniture (20.32%), fabricated metal products (19.07%), computer, electronic & optical products (15.28%).

4. SECTOR WISE EMPLOYMENT SCENARIO

Below table showcases the total employment created by MSMEs in each of the sectors, along with new employment created in the last three financial years.

Table 23: **[Panipat]** Total Employment in each Sector

S. No.	Industry	Total Employment	FY'17	FY'18	FY'19	New Employment (Last 3 Years)
Food, Beverages & Tobacco						
1	Food products	1074	150	138	115	403
2	Beverages	62	0	2	0	2
3	Tobacco	81	0	0	0	0
Textiles & Apparel						
4	Textiles	40116	3224	1679	1303	6206
5	Wearing apparel	1676	160	212	75	447
Leather, Wood & paper						
6	Leather and related products	265	20	2	18	40
7	Wood and products of wood and cork, except furniture; articles of straw and plaiting materials	625	53	3	1	57
8	Paper and paper products	462	81	27	22	130

9	Furniture	224	26	29	31	86
Pharma, Petro-Chemicals, Rubber products						
10	Pharmaceuticals, medicinal chemical and botanical products	214	14	2	14	30
11	Chemicals and chemical products	666	58	49	63	170
12	Coke & Refined Petroleum Products	76	25	12	0	37
13	Rubber and plastics products	901	90	33	64	187
Metals & Mineral Products						
14	Basic metals	465	14	6	9	29
15	Fabricated metal products, except machinery and equipment	427	204	53	31	288
16	Non-metallic mineral products	730	35	106	18	159
Electrical, Electronics & Machinery						
17	Computer, electronic and optical products	64	3	16	9	28
18	Electrical equipment	489	33	48	13	94
19	Machinery and equipment	1118	62	65	27	154
Automotive & Auto-Components						
20	Motor vehicles, trailers and semi-trailers	73	0	4	26	30
21	Other Transport Equipment	149	1	8	41	50
Other Manufacturing						
22	Other manufacturing	2894	351	190	164	705

Following scatter diagram shows a comparison of total employment across different MSME sectors and new employment generated in the last 3 financial years.

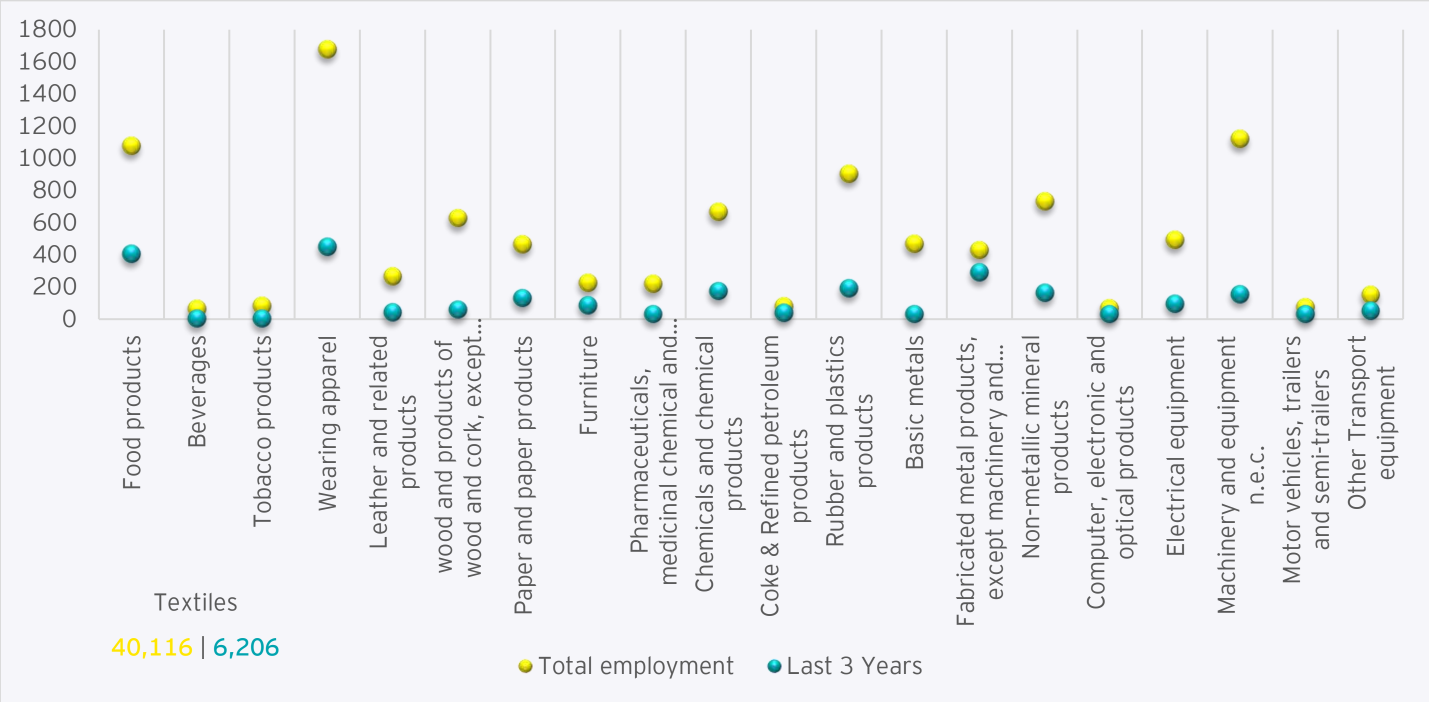


Figure 25: **[Panipat]** Total Employment & New employment in last 3 Financial Years (FY'17-FY'19)

Following bar chart showcases category wise per unit employment analysis for MSMEs in Panipat.

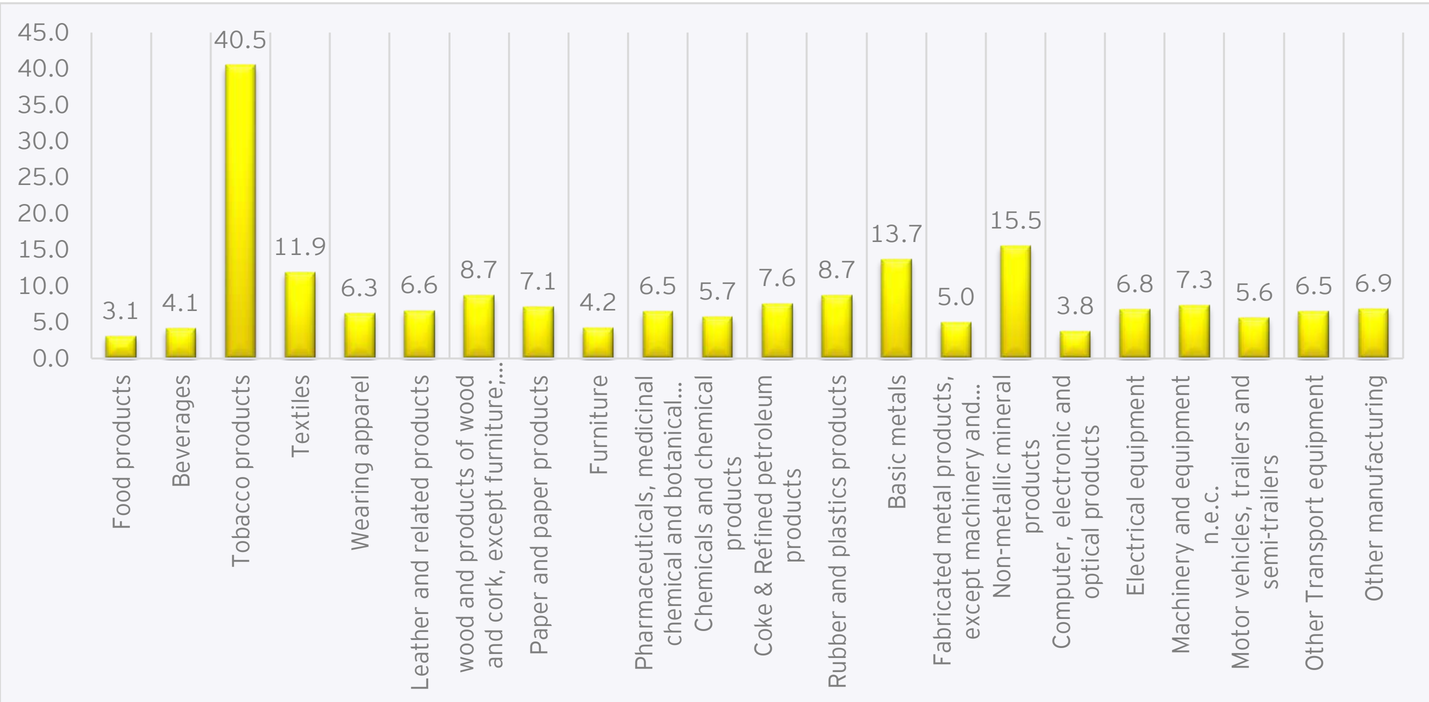


Figure 26: **[Panipat]** Category wise employment intensity

Following pie-charts showcase the sectors that have created maximum employment in each of the last 3 financial years.

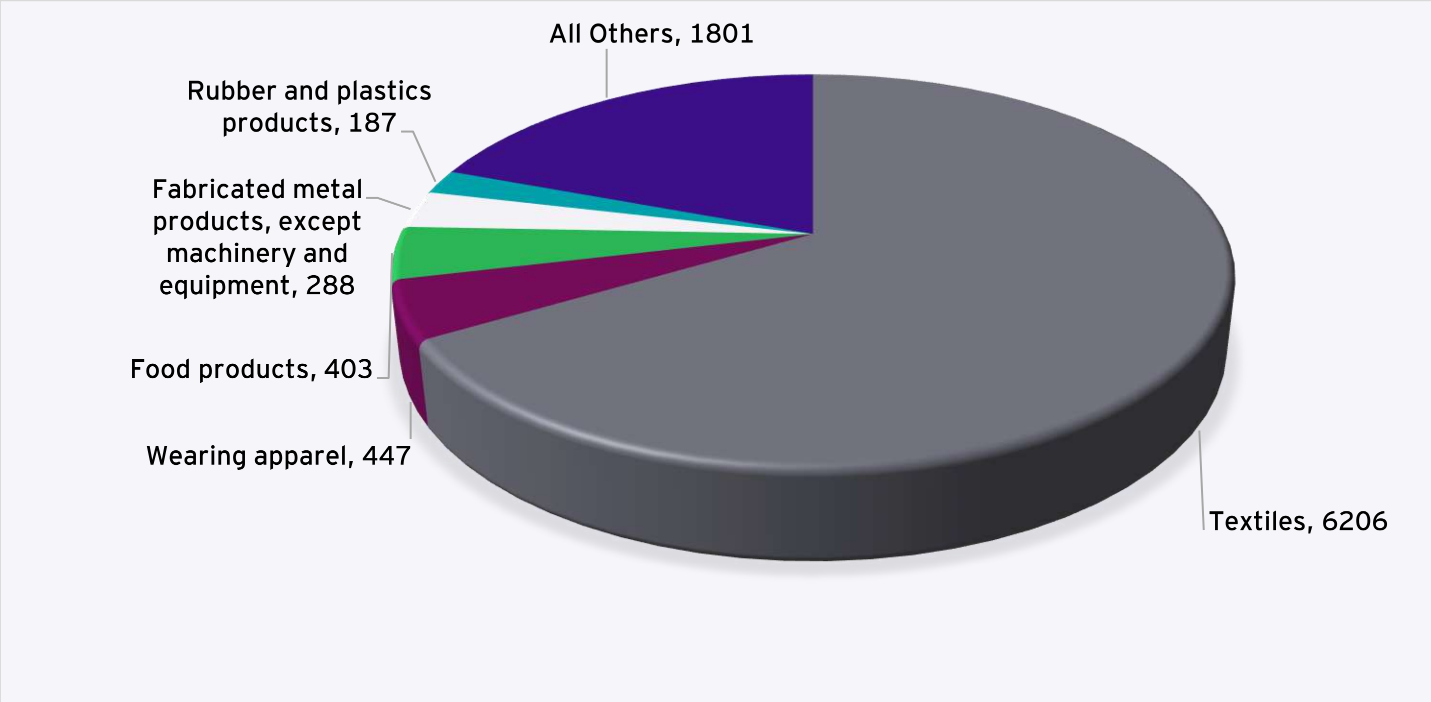


Figure 27: **[Panipat]** Top 5 Sectors with maximum new employment in last 3 Financial Years (FY'17-FY'19)

Key Takeaways

- Textile MSME sector provides the maximum employment (40116) followed by wearing apparel sector (1676) and machinery & equipment sector (1118).
- Textile sector has created the maximum new employment in last 3 years (6206), followed by wearing apparel (447). Sectors such as basic metal products,' computer, electronic & optical products' & beverages have experienced relatively low growth in new employment.
- As evident from above plot, tobacco products sector has maximum employment intensity with an average of 40.5 employees per unit, followed by non-metallic mineral products with 15.5 employees per unit and basic Metals at 13.7 employees per unit.
- Food Products has the least employment intensity with only 3.1 employees per unit, followed by computer, electronic & optical products at 3.8 employees per unit.
- Apart from textiles & wearing apparel, other sectors in top 5 in terms of employment creation are food products, fabricated metal products & rubber and plastic products.

5. EXPORTS FROM THE DISTRICT

Key exports products from Panipat includes primarily textiles & related products. Following table shows some of the exports from Panipat for last 2 FYs (figures in Crores).

(The export data in the table shows only exports related information that is available at the District Industries Centre, Panipat, and actual exports figure might be significantly higher).

Table 24: Exports from Panipat

S. No.	Industry	Exports (INR Lakhs)	
		FY'18	FY'19
1	Textile	4076	8338
2	Food Products	34.73	583.44
3	Steel	11.83	13.29
4	Pharmaceutical	0	188.59

6. NATURAL RESOURCES & RAW MATERIAL AVAILABLE

Major raw material available in Panipat are Brick earth, sand mining, clay etc. which are used in the Cement Industry & various Brick Kilns in the district.

Panipat has a total forest cover of around 17 sq. km which is less than 1.5% of its total area, hence district is not rich in forest resources.

Among agricultural produce, the Yamuna floodplains of Panipat are suitable for the cultivation of Rice & Sugarcane. Other key crops grown in the district include Wheat, Maize, Barley, Millets and Pulses such as lentils & beans.

7. KEY INDUSTRIAL ESTATES

Panipat currently has seven Industrial areas. These are:

- Old Industrial Area, Panipat
- Sector-25, HSIIDC, P-I, Panipat
- Sector-25, HSIIDC, P-II, Panipat
- Sector-29, HSIIDC, P-I, Panipat
- HSIIDC, Samalkha
- HSIIDC, Panipat

The details of HSIIDC plots in Panipat are as under:

Total number of Plots	417
Allotted Plots	100
Un-allotted Plots	317
Units in Production	-
Percentage of plots allotted	23.98%

The details of plots in Industrial area Samalkha, Panipat is as under:

Total number of Plots	77
Allotted Plots	76
Un-allotted Plots	1
Units in Production	60
Percentage of plots allotted	98.7%

8. MAJOR LARGE-SCALE UNITS

Apart from MSMEs, Panipat also has many Large & Mega enterprises operational in various sectors. Below table showcases number of Large & Mega enterprises in each sector along with their names.

Table 25: **[Panipat]** Large & Mega Units in each Sector

S. No.	Industry	Number	Names of Large & Mega Units
1	Textiles	11	• M/s H.S. Textile Mills • BIRMI IMPEX PVT. LTD. • PARV TEX INDIA • DEVGREE EXPORTS • M/S GOLDEN TEXO FABS LTD. • M/S RAJ OVERSEAS, PANIPAT • M/S ASM SPUNTEX • M/S Golden Tery Towel • M/S RAJ OVERSES • M/S SUNNY INTERNATIONAL LTD. • M/s. Riviera Textiles
2	Food Products	6	• M/S PAN FOODS (DIVISION OF KAYEM FOOD INDUSTRIES PVT. LTD.) • M/s. NESTLE India Ltd • M/s. S.S.A. International • M/S G.R.M. Overseas Ltd • M/S Pachranga FOODS • Kundan Rice Mill Pvt. Ltd.
3	Beverages	2	• M/s. Varun Beverages • M/s Aradhana Soft Drinks

4	Petroleum & Oil	1	• M/s. Indian Oil Corpn. Ltd., (Oil Refinery)
5	Rubber	2	• M/s Indian Synthetic rubber Ltd. • M/S Ambadi Enterprises
6	Cement	3	• M/s. Ultra Tech. Cement Ltd • Naphtha Crackers Plant, (IOC Ltd.) • Shree Cement Ltd.
7	Fertilizers & Petrochemicals	1	• M/S Deepak Fertilizers and Petrochemicals Corpn. Ltd.

9. SERVICES SECTOR SNAPSHOT

Apart from manufacturing there are several MSMEs also involved in Services sector. Below table gives snapshot of the services sector in Panipat:

Table 26: **[Panipat]** Services Sector Snapshot

S. No.	Industry	Total Units	Micro	Small	Medium	Total Investment (INR Lakhs)	Total employment
1	Civil Engineering	62	37	24	1	1619	1842
2	Construction of building	18	15	3	0	168	431
3	Electricity, gas, steam and air conditioning supply	15	15	0	0	69	46
4	Office administrative, office support and other business support activities	170	147	22	1	504	468
5	Other professional, scientific and technical activities	311	272	39	0	947	825
6	Repair and installation of machinery and equipment	100	86	14	0	879	3007
7	Specialized construction activities	37	27	10	0	939	367
8	Architecture and engineering activities; technical testing and analysis	68	55	13	0	553	496

9	Financial service activities, except insurance and pension funding	63	59	4	0	236	259
10	Food and beverage service activities	774	750	23	1	2661	1447
11	Mining support service activities	16	14	2	0	91	47
12	Repair of computers and personal and household goods	328	300	28	0	1754	2578
13	Warehousing and support activities for transportation	79	47	28	4	2499	465
14	Water collection, treatment and supply	13	13	0	0	44	57
15	Computer programming, consultancy and related activities	131	124	7	0	505	450
16	Human health activities	124	102	21	1	384	1448
17	Information service activities	51	48	3	0	148	219
18	Real estate activities	26	21	5	0	100	235

10. CLUSTERS SCENARIO

There are two clusters, one under the Govt. of India's Cluster Development Scheme (MSE-CDP) and another under Haryana State Mini Cluster Development Scheme in Panipat at various stages of implementation.

Table 27: Mini Clusters in Panipat

S. No.	Cluster	Location	Cluster Identification	DSR Preparation	DPR Preparation	Implementation
1	Home Furnishing Cluster (Mini-Cluster Scheme)	Panipat	√	√	√	
2	Textile Machinery Cluster (MSE-CDP Scheme)	Panipat	√	√	√	

11. INDUSTRY ASSOCIATIONS

The key industrial associations in Panipat are:

Table 28: Industry Associations in Panipat

S. No.	Name and Address of Industrial Association	Name of the President & Email Address	Contact
1	Haryana Chamber of Commerce & Industries (Distt. Unit) Association, Plot No. 87 Sec 25, Part II, Huda, Panipat	Sh. Vinod Kumar, Khandelwal. Mahdev_expo@yahoo.com Hccipnp2018@gmail.com	9813081335
2	The Panipat Exporters Association, 19, Sakuntala Complex, Panipat.	Sh. Lalit Goel lalitgoel@rivieratex.com aseem@advisers.in pnpexpo@gmail.com	9896021900
3	Handloom Exports Manufacturing Association C/o. M/s. Diamond Exports, Babail Road, Panipat.	Sh. Ramesh Verma. rameshvermahema@gmail.com	9812034897
4	Industrial Area Manufacturers Association C/O E 40-41, Indl. Area, Panipat.	Sh. Vinod Grover Rajgrover51@gmail.com Shiv Malhotra, Convenor	9812205051 9812050577
5	Panipat Dyers Association, Plot no. 200, Sec-29, P-II, Distt. Panipat.	Sh. Bhim Rana Bhimrana1974@gmail.com	9215880000
6	Industrial Estate Sector-25 Association, Plot No.58-A, Sector-25, Part-1, HUDA, Panipat.	H.S. Dhammu info@tashmeshpowerloom.com	9813193390
7	Sector-25, Part-11 Association, Plot no-87, Sector-25, Part-11, Panipat.	Sh. Vinod Kumar, Khandelwal Mahdev_expo@yahoo.com	9813081335
8	All India Woollen and Shoddy Mills Association. C/o M/s. Swastika Spinning Mill, Near Khadi Ashram, Panipat.	Sh. Pawan Garg Pawangarg45@gmail.com	9812039252
9	Industrial Estate Sector-29, Association Plot No.137, Sector-29, HUDA, Panipat Plot no. 256, Panipat	Sh. Shree Bhagwan Aggarwal (President) shreebhagwanaggarwal@yahoo.com uniflexinds@yahoo.com Sh. Sanjeev Garg	9812034880 9896400137 9215560075
10	Kambal Manufacturing Association. C/o M/s. Gumber Fabric, Barsat Road, Bichpari Chowk, Arora Feed, Panipat.	Sh. Suresh Gumber agumber@ymail.com	9812305100
11	Shoddy Spinning Manufacturing Association. C/o M/s. Vishal Spinning Mills, G.T. Road, Karnal Side, Panipat.	Sh. Vishnu Goel. Vishnugoel456@gmail.com	9416053158
12	Haryana Carpet Manufacturers Association C/o M/s. Real Carpets, Near Radha Yarn, Barsat Road, Panipat.	Satinder Gulia contact@hcma.in satindergulia@gmail.com Azad Malik Azadmalik62483@gmail.com	9017200002 9416400074 9416016463
13	Panipat Plastic Industries Association. House No.43, Gole Market, Model Town, Panipat.	Sh. Sunil Thakral	9416019627
14	Roater Spinner Association C/o Home Textile India, Pasina Khurd Road, G.T. Road, Village	Sh. Pritam Singh, pritam.sachdeva@gmail.com	9728300007

	Siwaha, Panipat.		
15	Haryana Small Scale Industries	Yashpal Malik Yashpalmalik2012@gmail.com	9416000005
16	Foundry Association, Samalkha. C/o M/s. Bansal Iron Foundry, Samalkha.	Sh. Parkash Bansal. Shubhambansal617@gmail.com	9813082245
17	Industrial Welfare Association Sec 29, P-II, C/o Artex Home Fashions, Plot not 64, Sector-29, P-II, HUDA, Panipat	Sh. Vineet Sharma vineet@artexhomefashions.com	9416017445
18	Panipat Small Engg. Workshop Association	Sh. Sukhbir Malik Psewa.132103@gmail.com	9812019139
19	Panipat Industrial Association, H. No. 158R, Model Town, Panipat	Sh. Pritam Singh, piasspnp@gmail.com	9728300007

12. KEY ISSUES OF THE INDUSTRIES

Some of the key issues raised by the various industry associations in Panipat are:

- Panipat industry demands to increase the load factor for industrial consumers.
- Industry requests to remove the non-refundable amount charged while taking new electricity connection.
- Demand to reduce the rates of HSIIDC industrial plots near the Refinery sector to attract more investment.
- Demand for housing facility for workers/weavers working in Industrial sectors 25 & 29.
- Support in the form of subsidy requested for setting up of Zero Liquid Discharge plant for industrial units.
- Panipat Industry requests for allotment of vacant Government/Panchayat lands on long term lease for industries in order to make them cost competitive.
- Panipat exporters demand for refund/credit claim on taxes paid on High Speed Diesel used to generate power to manufacture export-oriented goods.

13. POTENTIAL AREAS OF INTERVENTION

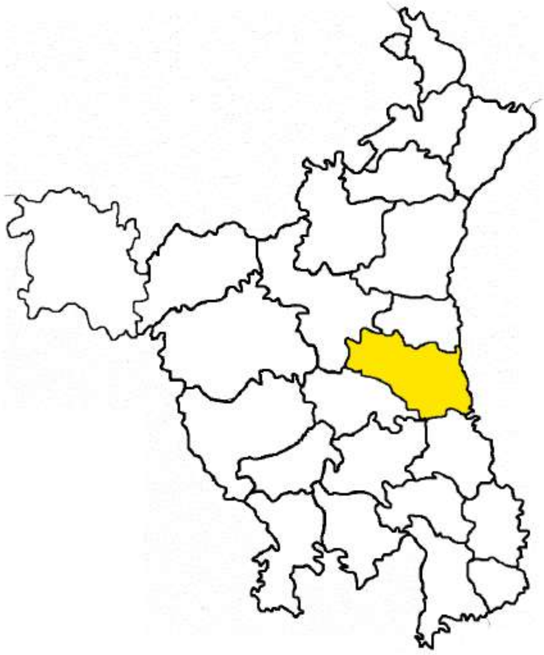
- Industry department can facilitate the formation of an effective grievance redressal mechanism for all power related issues.
- Pricing/Promotion/ Financing schemes for plots in Industrial areas may be revised to attract more investments.
- Building of affordable housing facilities in Industrial areas with labor intensive industry needs to be expedited.
- State govt. can finalize a policy for on-lease availability of Gram Panchayat lands to the industry.
- Input tax credit for export-oriented units may be extended to High Speed Diesel used for power generation.

14. POTENTIAL AREAS OF INVESTMENT

- Panipat is one of the major hubs for textile products and is also known as 'Textile city' of India. The sector has a whopping 3373 MSMEs currently operational with 777 new units opening up in last 3 years. Accordingly, the sector presents attractive opportunities in investment towards product diversification, higher value chain products such as technical textiles/smart textiles etc.
- Given the well-developed textile sector in Panipat, there is significant opportunity for growth in Ancillary sectors such as 'Wearing Apparel', with investment towards design centers, stitching facilities & retail stores.

04. Sonipat

District Profile



EXECUTIVE SUMMARY

District Profile

MSME Scenario

04

Sonipat

Famous for....

"Food Processing & Textile Industry"

1 MSMEs in Sonipat

Total number of MSME units **4,115**

New MSME units (last 3 years) **2,234**

Wearing Apparel

Food Products

Textile

Rubber & Plastic Products

Electrical Equipment

Top 5 sectors – Maximum number of MSMEs

2 Investment Scenario in Sonipat

Total Investment (INR Lakhs) **3,42,346**

New Investment (last 3 years; INR Lakhs) **66,399**

Textiles

Rubber & Plastic Products

Beverages

Food Products

Paper & paper Products

Top 5 sectors – Maximum investment by MSMEs

3 Employment Scenario in Sonipat

Total Employment **56,562**

New Employment (last 3 years) **15,905**

Textiles

Rubber & Plastic Products

Food Products

Electrical Equipment

Paper & Paper Products

Top 5 sectors – Most employment generated

4 Potential for MSMEs

Wearing apparel sector presents attractive opportunities in investment towards branded retailing of product sourced from the district and advanced apparel designing/printing facilities.

'Food Products' sector offers significant investment potential in facilities providing raw material supplies for food industry such as preservatives, additives, flavors, and also downstream food product units such as ready-to-cook/ready-to-eat foods etc.

5 Others

Total Exports (FY 18-19; INR Lakhs) **482897**

Number of Large & Mega units **6**

Existing Clusters **2 Mini-Clusters**
1 MSE-CDP Cluster

1. INTRODUCTION

Sonipat, one of the prominent cities of the 'National Capital Region of India' is also one of the 22 Districts of Haryana. Sonipat is located on the Delhi-Ambala stretch of NH-44, the longest National Highway in India, and is around 52 Km from Delhi. Sonipat is very near & well connected to other prominent Industry Centers of India such as Noida, Gurugram, Panipat & South Delhi etc.

1.1 Geography

Sonipat lies in the central-eastern part of the Haryana state, and is surrounded by Panipat on the north, Delhi on the south, U.P. on the east and Jind & Rohtak on the west. Sonipat has a largely plane landscape.

Sonipat has primarily dry climate with hot summer & cold winter. The city experiences rainfall mostly in the monsoon season which accounts for 75% of the total annual rainfall. River Yamuna flows along the eastern boundary of the district and canals from the river are the key source of irrigation in the district.

District can be primarily divided into three geographic regions: Yamuna flood plains, the upland plains, & the sandy regions.

1.2 Demographic Profile

As per the census of 2011, total population of Sonipat is 14,50,001 persons. The district has a high population density of 683 persons per Sq. Km. Rural to urban percentage distribution is 68.73% & 31.27% respectively. Sonipat has a high literacy rate of 79.12% with a female literacy rate of 69.8% and a male literacy rate of 87.18%. The district has a lower female to male ratio at 856 females per thousand males, compared to the state average of 877 and significantly lower than the national average of 940. Population growth for Sonipat for the decade 2001-2011 is 13.35%.

1.3 Administrative Set-up

Sonipat has a total land area of 2260 Sq. Km. The district is a part of Rohtak division of Haryana. The district has four tehsils namely Gohana, Kharkhoda, Sonipat & Ganaur, which are also the four sub-divisions in the district. Sonipat also has two sub-tehsils Khanpur Kalan & Rai, 8 blocks, 4 municipal councils/committees, 6 assembly constituencies, 1 parliamentary constituency & 349 villages.

The following table shows categorization of blocks as per the status of industrial development.

Table 29: **[Sonipat]** Categorization of Blocks

Block A	Block B	Block C	Block D
Rai	Ganaur	Mundlana	Kathura
Sonepat	Kharkhoda	Gohana	
	Murthal		

2. SECTOR WISE MSME LANDSCAPE

Following table shows the total number of MSME units in each sector, in Sonipat, along with the bifurcation of number of micro, small and medium enterprises.

The table also shows number of new units that started their commercial production in the last three financial years.

Table 30: **[Sonipat]** No. of MSME Units in each Sector

S. No	Industry	Total Units	Micro	Small	Medium	New Units (Last 3 Years)
Food, Beverages & Tobacco						
1	Food products	567	371	178	18	240
2	Beverages	25	15	10	0	25
3	Tobacco	18	2	14	2	7
Textiles & Apparel						
4	Textiles	276	121	130	25	87
5	Wearing apparel	1262	1229	30	3	1184
Leather, Wood & paper						
6	Leather and related products	61	18	42	1	13
7	Wood and products of wood and cork, except furniture	81	61	20	0	27
8	Paper and paper products	119	7	105	7	42
9	Furniture	44	32	12	0	19
Pharma, Petro-Chemicals, Rubber products						
10	Pharmaceuticals, medicinal chemical and botanical products	103	49	49	5	35
11	Chemicals and chemical products	146	88	56	2	51

12	Coke & Refined Petroleum Products	19	10	9		11
13	Rubber and plastics products	273	83	179	11	89
Metals & Mineral Products						
14	Basic metals	106	49	55	2	32
15	Non-metallic mineral products	46	31	12	3	28
Electrical, Electronics & Machinery						
16	Computer, electronic and optical products	49	32	17		26
17	Electrical equipment	222	108	110	4	74
Automotive & Auto-Components						
18	Motor vehicles, trailers and semi-trailers	61	27	29	5	18
19	Other Transport Equipment	44	23	21		11
Other Manufacturing						
20	Other manufacturing	593	354	225	14	215

Following scatter diagram shows the comparison between total units in each sector vis-a-vis new units opened up in the last 3 financial years.

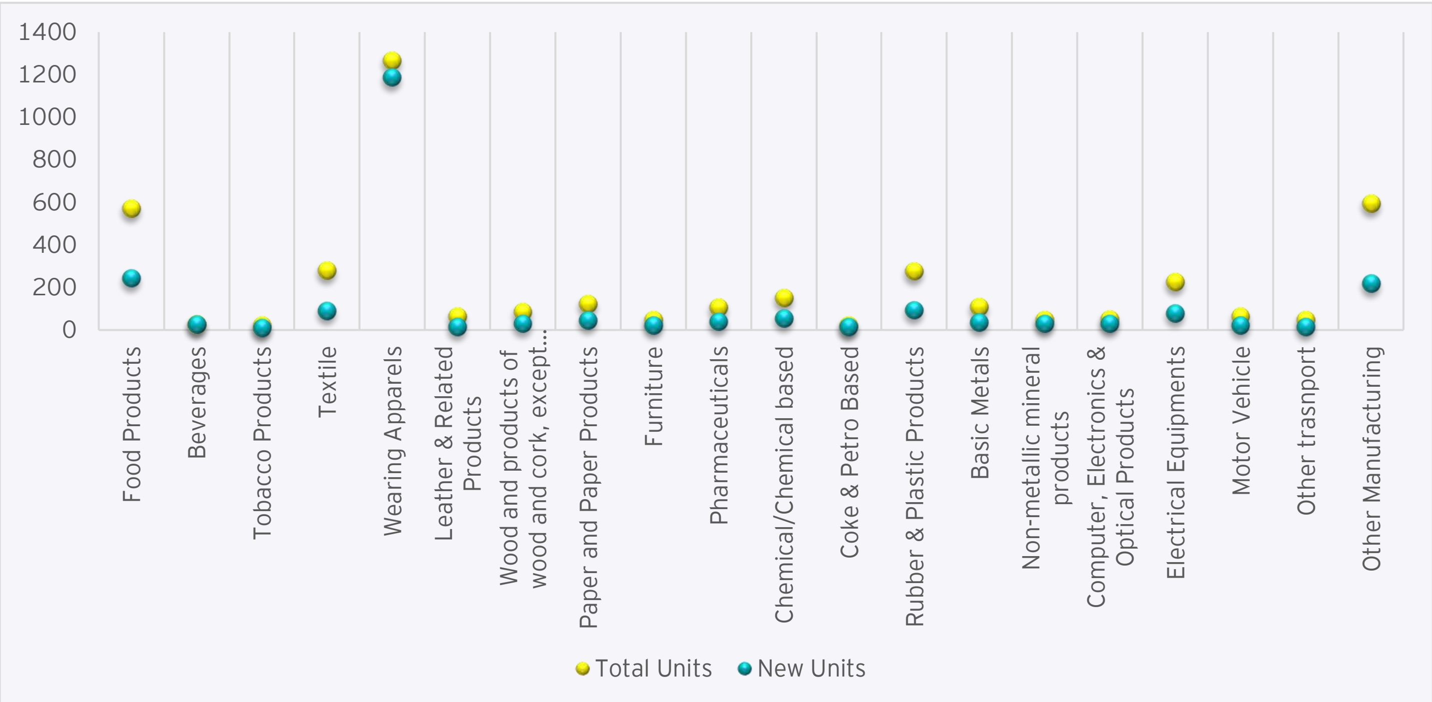


Figure 28: **[Sonipat]** Total Units & New Units in each Sector

2.1 Top 10 Sectors: Based on Number of Units

Following table shows top ten sectors in Sonipat, based upon the total number of MSME units in the district.

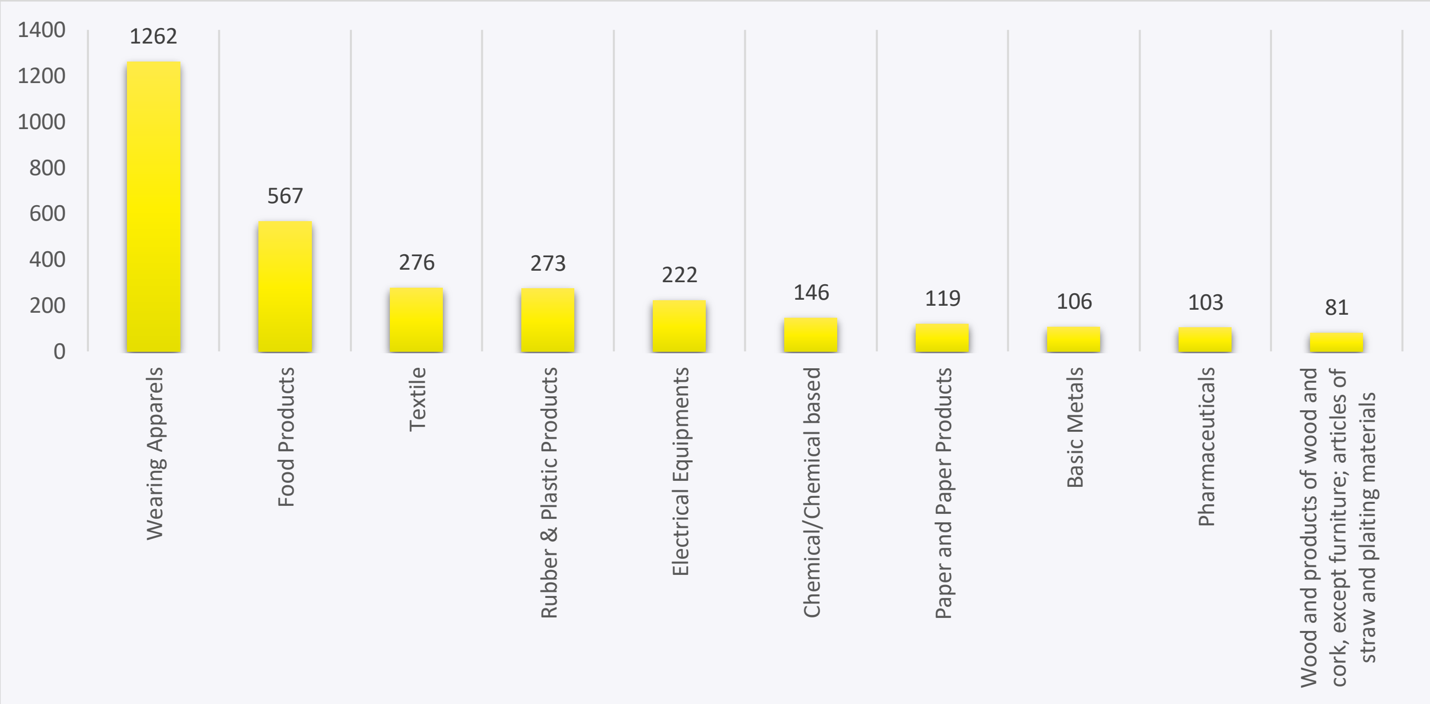


Figure 29: **[Sonipat]** Top 10 sectors - Total No. of MSME Units

2.2 Top 10 Sectors: Based on New Units in Last 3 Years

Following figure shows the top ten sectors in Sonipat, based upon number of new MSME units set-up in the last three years (except for Wearing apparel sector, which with 1184 new units is an outlier and not represented in the below chart).

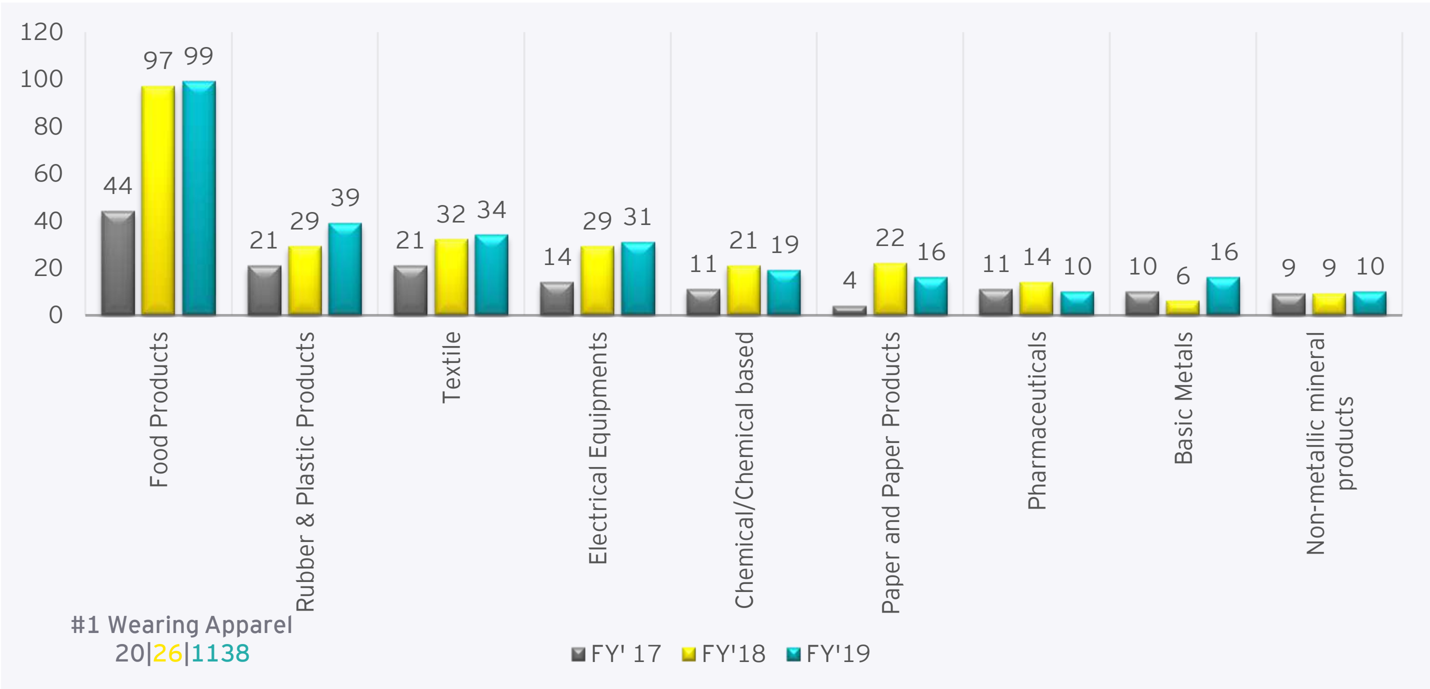


Figure 30: **[Sonipat]** Top 10 Sectors - New Units in Last 3 Years

Key Takeaways

- Maximum no. of MSME units in Sonipat are involved in the ‘wearing apparel’ sector, followed by ‘food products’.
- Apart from wearing apparel and food products; textile, rubber & plastic products, electrical equipment sectors have significant number of MSMEs operating out of Sonipat.
- In last three years, ‘wearing apparel’ sector has seen maximum number of new MSME units opened (1184), followed by food products (240), rubber & plastic products (89).
- In terms of percentage growth, beverages sector has experienced impressive recent growth with 100% of the total units having opened up in the last 3 years, followed by wearing apparel at 93.82%.

3. SECTOR WISE INVESTMENT SCENARIO

Punjab National Bank is the convener bank of State Level Bankers’ Committee (SLBC) in Haryana and also the district lead bank of Sonipat.

Following table shows the total investment by MSMEs in each sector in Sonipat, along with new investment in the last three financial years (figures are in Lakhs).

Table 31: **[Sonipat]** Total Investment by MSMEs

S. No	Industry	Investment (INR Lakhs)				
		Total Investment	FY'17	FY'18	FY'19	New Investment (Last 3 Years)
Food, Beverages & Tobacco						
1	Food products	24169	3806	3246	5876	12928
2	Beverages	37097	318	780	1199	2297
3	Tobacco	5497	52	154	2035	2241
Textiles & Apparel						
4	Textiles	49611	3381	3174	2541	9096
5	Wearing apparel	9330	381	364	1563	2308
Leather, Wood & paper						
6	Leather and related products	7307	305	212	15	532

7	Wood and products of wood and cork, except furniture; articles of straw and plaiting materials	4054	62	504	702	1268
8	Paper and paper products	21542	170	942	1306	2418
9	Furniture	2783	85	308	553	946
Pharma, Petro-Chemicals, Rubber products						
10	Pharmaceuticals, medicinal chemical and botanical products	11237	273	880	322	1475
11	Chemicals and chemical products	10642	278	724	651	1653
12	Coke & Refined Petroleum Products	11763	23	484	118	625
13	Rubber and plastics products	44092	3100	4294	2756	10150
Metals & Mineral Products						
14	Basic metals	12943	476	323	2110	2909
16	Non-metallic mineral products	5400	350	81	761	1192
Electrical, Electronics & Machinery						
17	Computer, electronic and optical products	2710	389	95	99	583
18	Electrical equipment	20942	127	1845	2039	4011
Automotive & Auto-Components						
20	Motor vehicles, trailers and semi-trailers	5605	924	222	35	1181
21	Other Transport Equipment	2660	163	26	11	200
Other Manufacturing						
22	Other manufacturing	52962	2181	2432	3773	8386

Following scatter diagram shows a comparison of total MSME investment and new investment in the last 3 financial years, across different sectors of Sonipat.

Figure 31: **[Sonipat]** Total Investment & New Investment in Last 3 Financial Years (FY'17-FY'19)

Following pie-chart showcases the sectors that have attracted maximum investments in the last 3 financial years (figures are in Lakhs).

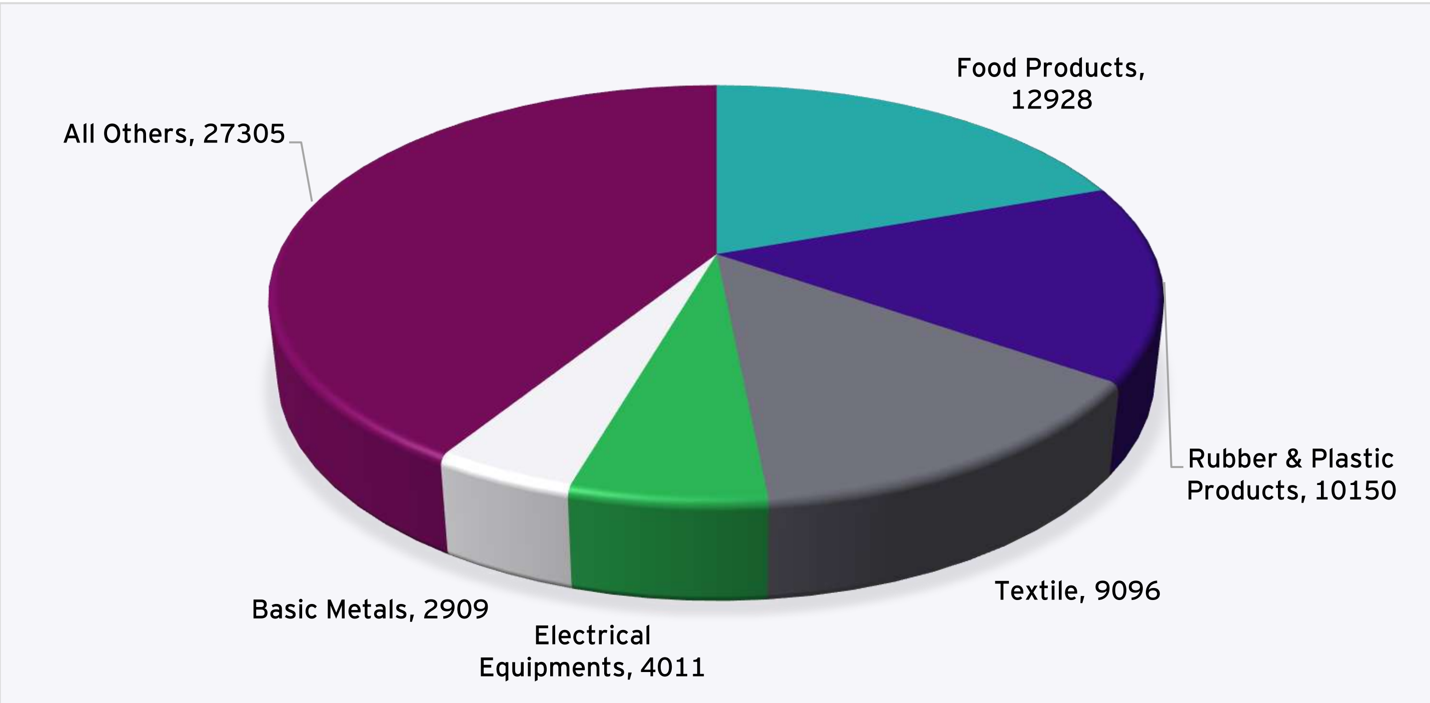


Figure 32: **[Sonipat]** Top 5 Sectors with maximum investment in last 3 Financial Years (FY'17-FY'19)

Following diagram shows a comparison of compound annual growth rate of various sectors for last three financial years.

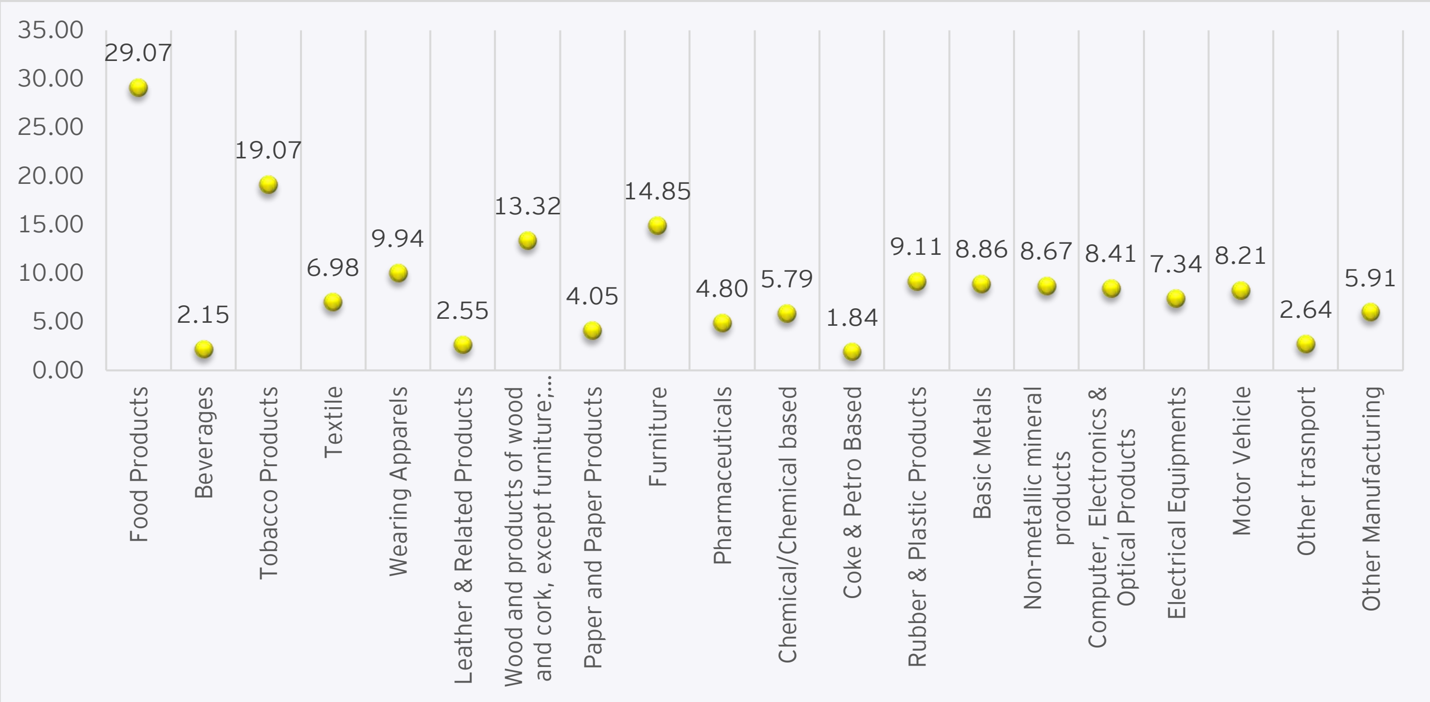


Figure 33: **[Sonipat]** CAGR for Last 3 Financial Years (FY'17-FY'19)

Key Takeaways

- Highest amount of investment by MSMEs in Sonipat has been in textile sector (INR 496.11 Cr), followed by rubber & plastic products sector (INR 440.92 Cr).

- Last three financial years have seen maximum investment in food products sector (INR 129.28 Cr) and rubber & plastic products (INR 101.50 Cr).

- As evident apart from food products, rubber & plastic products, textile, electrical equipment and basic metals have attracted the maximum investments in last three financial years.

- Highest CAGR for last 3 financial years has been recorded in the food products sector at 29.07%. Other sectors with high CAGR in MSME investments in last 3 FYs are: tobacco products (19.07%), furniture (14.85%), wood products (13.32%), wearing apparel (9.94%), and rubber & plastic products (9.11%).

4. SECTOR WISE EMPLOYMENT SCENARIO

Below table showcases the total employment created by MSMEs in each of the sectors, along with new employment created in the last three financial years.

Table 32: **[Sonipat]** Total Employment in each Sector

S. No.	Industry	Total Employment	FY'17	FY'18	FY'19	New Employment (Last 3 Years)
Food, Beverages & Tobacco						
1	Food products	4498	651	638	1629	2918
2	Beverages	546	24	68	204	296
3	Tobacco	380	35	20	70	125
Textiles & Apparel						
4	Textiles	6358	533	1333	356	2222
5	Wearing apparel	3461	63	240	1576	1879
Leather, Wood & paper						
6	Leather and related products	2653	34	126	10	170
7	Wood and products of wood and cork, except furniture; articles of straw and plaiting materials	902	17	106	57	180
8	Paper and paper products	3755	57	269	301	627
9	Furniture	529	37	64	86	187
Pharma, Petro-Chemicals, Rubber products						
10	Pharmaceuticals, medicinal chemical and botanical products	2760	106	171	118	395
11	Chemicals and chemical products	2203	83	169	119	371
12	Coke & Refined Petroleum Products	363	37	64	86	187
13	Rubber and plastics products	6256	473	362	590	1425
Metals & Mineral Products						
14	Basic metals	2060	109	126	265	500
15	Non-metallic mineral products	1110	156	77	119	352
Electrical, Electronics & Machinery						

16	Computer, electronic and optical products	933	282	283	202	767
17	Electrical equipment	4281	53	417	497	967
Automotive & Auto-Components						
18	Motor vehicles, trailers and semi-trailers	2118	122	61	17	200
19	Other Transport Equipment	680	43	39	12	94
Other Manufacturing						
20	Other manufacturing	10716	415	631	997	2043

Following scatter diagram shows a comparison of total employment across different MSME sectors and new employment generated in the last 3 financial years.

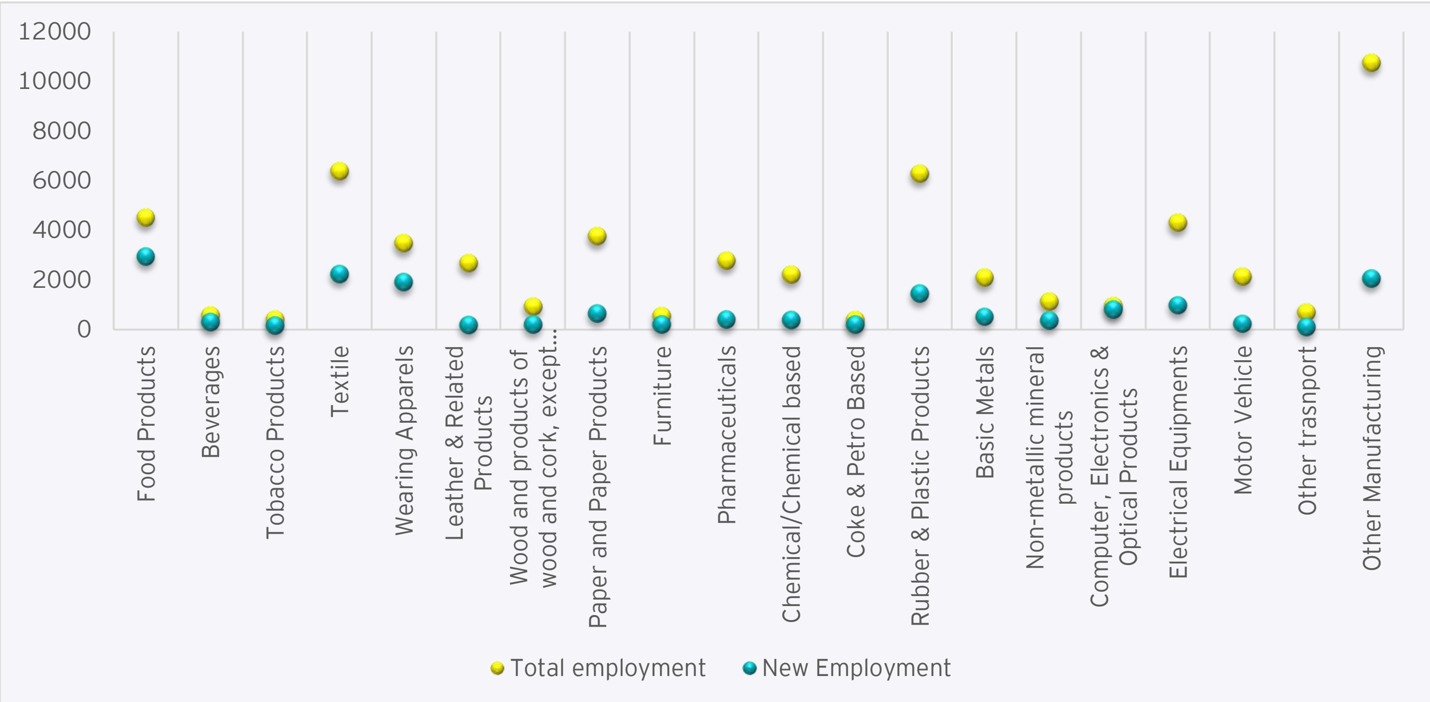


Figure 34: **[Sonipat]** Total Employment & New employment in last 3 Financial Years (FY'17-FY'19)

Following bar chart showcases category wise per unit employment analysis for MSMEs in Sonipat.

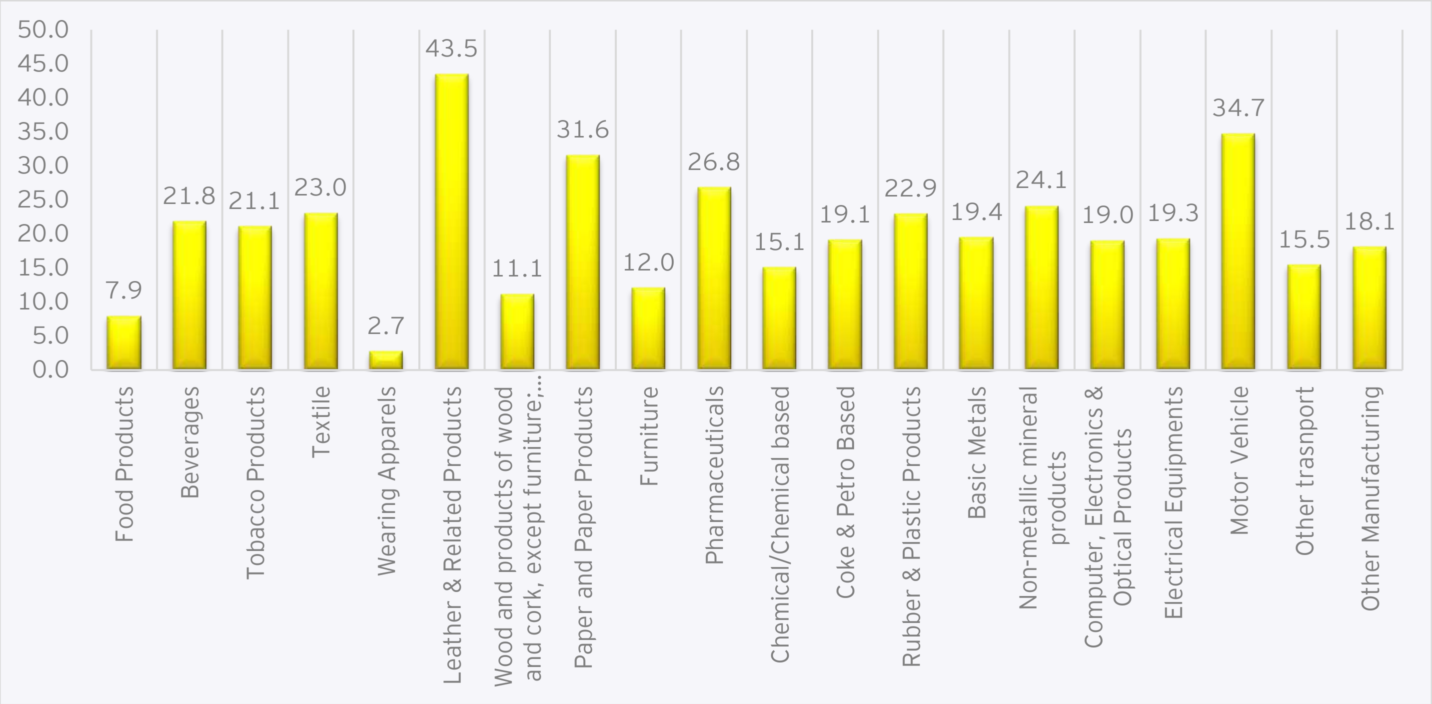


Figure 35: **[Sonipat]** Category wise employment intensity

Following pie-charts showcase the sectors that have created maximum employment in each of the last 3 financial years.

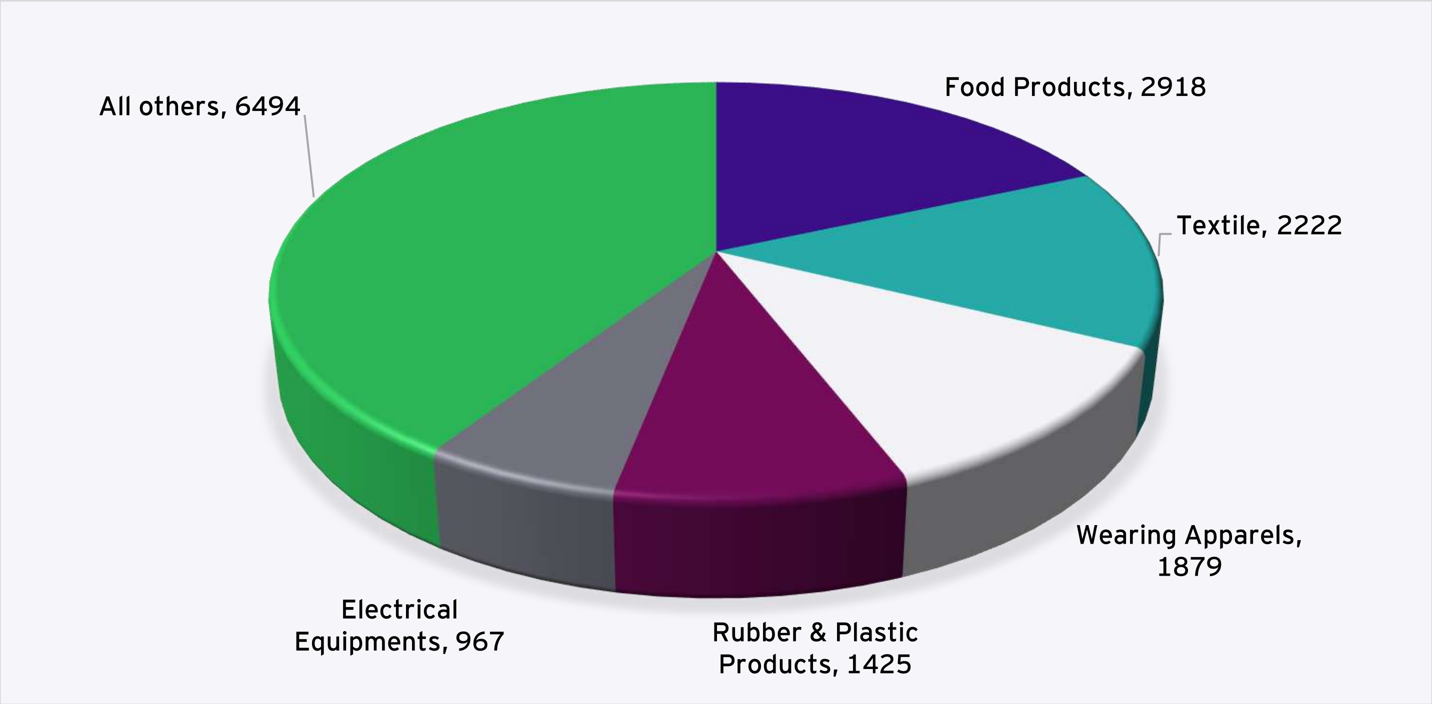


Figure 36: **[Sonipat]** Top 5 Sectors with maximum new employment in last 3 Financial Years (FY'17-FY'19)

Key Takeaways

- Textile MSME sector provides the maximum employment (6358) followed by rubber & plastic products sector (6256) & food products sector (4498).

- Food Products sector has created the maximum new employment in last 3 years (2918), followed by textile (2222) & wearing apparel (1879). Sectors such as leather & related products, tobacco products, other transport equipment have experienced relatively low growth in new employment.

- Leather & related products sector have maximum employment intensity with an average of 43.5 employees per unit, followed by motor vehicles sector with 34.7 employees per unit and paper & paper products sector at 31.6 employees per unit.

- Wearing apparel sector has the least employment intensity with only 2.7 employees per unit, followed by food products at 7.9 employees per unit.

5. EXPORTS FROM THE DISTRICT

Exports from Sonipat stood at **INR 4,54,620.72 Lakhs** for financial year 2017-18 and at **INR 4,82,896.98 Lakhs** for financial year 2018-19

(The export figures mentioned above represent only exports related information that is available at the District Industries Centre, Sonipat, and actual exports figure might be significantly higher).

6. NATURAL RESOURCES & RAW MATERIAL AVAILABLE

The Yamuna flood plains area of the district is primarily known for the cultivation of Rice & sugarcane & some production of fruits such as Banana & Papaya.

The upland plains area of the district, apart from crops also has significant production of oil seeds, horticultural plants, vegetables & flowers etc.

The main flora found in Sonipat consists of Kikar, Sheesham, Babool, eucalyptus, Methi etc.

7. KEY INDUSTRIAL ESTATES

Sonipat being one of the significantly industrialized districts of Haryana has a high concentration of Industrial Areas. Following is a list of current Industrial Estates in Sonipat:

S. No.	Industrial Area
1	HSIIDC Industrial Estate, Kundli Ph- I to V
2	HSIIDC, Industrial Estate, Rai Ph- I & II
3	HSIIDC, Food Park Rai
4	HSIIDC, Industrial Estate, Barhi, Ph- I & II
5	HSIIDC, Industrial Estate Food Park, Barhi
6	HSIIDC, Industrial Estate Sonepat
7	HSIIDC, Industrial Estate Murthal
8	Old Industrial Area, Sonepat
9	Old Industrial Estate Sonepat
10	I.D.C. Sonepat
11	Udyog Kunj, Jatheri
2	SGC, Murthal
13	Industrial Estate, HUDA Murthal
14	IMT, Kharkhoda

Details of HSIIDC plots in Sonipat are as under:

HSIIDC Industrial Estate, Kundli, Sonipat:

Total number of Plots	1812
Allotted Plots	1261
Unallotted Plots	550
Units in Production	778
Percentage of plots allotted	69.5%

HSIIDC Industrial Estate, Rai, Sonipat:

Total number of Plots	1777
Allotted Plots	1490
Unallotted Plots	287
Units in Production	821
Percentage of plots allotted	83.8%

HSIIDC Industrial Estate Barhi, Sonipat:

Total number of Plots	1131
Allotted Plots	704
Unallotted Plots	427
Units in Production	315
Percentage of plots allotted	62.2%

HSIIDC Industrial Estate, Sonipat:

Total number of Plots	39
Allotted Plots	38
Un - allotted Plots	1
Units in Production	36
Percentage of plots allotted	97.4%

8. MAJOR LARGE-SCALE UNITS

Apart from MSMEs, Sonipat also has some Large & Mega enterprises operational in various sectors. Below table showcases number of Large & Mega enterprises in each sector along with their names.

Table 33: **[Sonipat]** Large & Mega Units in each Sector

S. No.	Industry	Large & Mega Industries
1	Manufacture of Food Products	• Home Made Bakers (India) Ltd., Kami • Nature Bio Foods Limited, GT Road, Kumaspur • Patanjali Ayurved Ltd., Unit VI, Sonipat
2	Manufacture of Textiles	• Sino India Textiles Pvt. Ltd., HSIIDC Barhi
3	Manufacture of Paper & paper products	• Prachi Pvt. Ltd., HSIIDC Kundli
4	Manufacture of Chemical & chemical products	• D & M Cables, Pvt. Ltd, Rai

9. SERVICES SECTOR SNAPSHOT

Sonipat has a thriving services sector. Below table gives snapshot of the services sector in Sonipat:

Table 34: **[Sonipat]** Services Sector Snapshot

S. No.	Industry	Total Units	Micro	Small	Medium	Total Investment (INR Lakhs)	Total employment
1	Advertising and market research	18	14	3	1	394	154
2	Architecture and engineering activities; technical testing and analysis	47	35	11	1	1221	401
3	Civil Engineering	29	21	8	0	276	636
4	Computer programming, consultancy and related activities	90	83	7	0	372	362
5	Construction of building	8	7	1	0	69	39
6	Creative, arts and entertainment activities	14	12	2	0	90	55
7	Education	80	73	7	0	505	383
8	Financial service activities, except insurance and pension funding	57	57	0	0	190	160
9	Food and beverage service activities	82	67	14	1	1139	433
10	Human health activities	444	395	46	3	3059	1171
11	Information service activities	37	31	6	0	460	332
12	Insurance, reinsurance and pension funding, except compulsory social security	10	10	0	0	40	24
13	Land transport and transport via pipelines	68	32	35	1	1812	460
14	Legal and accounting activities	56	56	0	0	179	175

15	Office administrative, office support and other business support activities	115	104	9	2	1391	946
16	Other financial activities	36	33	3	0	140	118
17	Other professional, scientific and technical activities	191	180	10	1	1611	806
18	Remediation activities and other waste management services	0	0	0	0	0	0
19	Security and investigation activities	342	333	8	1	796	2820
20	Sports activities and amusement and recreation activities	19	15	4	0	1776	160
21	Telecommunications	118	103	15	0	880	344
22	Waste collection, treatment and disposal activities; materials recovery	3	1	2	0	44	40
23	Water collection, treatment and supply	1	1	0	0	5	3

10. CLUSTERS SCENARIO

Following is the list of clusters under the State's Mini cluster Development Scheme in Sonipat & their current status:

Table 35: Mini Clusters in Sonipat

S. No.	Mini Clusters	Cluster Identification	DSR Preparation	DPR Preparation	Implementation
1	Textile & Allied Products	√	√	√	√
2	Food Processing Cluster	√	√	√	

Apart from above mini clusters, Sonipat also has Kundli Stainless Steel Cluster under the MSE-CDP scheme of Govt. of India, which is currently under the implementation stage.

11. INDUSTRY ASSOCIATIONS

Following is a list of key industrial associations in Sonipat.

Table 36: Industry Associations in Sonipat

S. No.	Name & Address of the Association	President/Gen. Sec.	Contact	E-Mail
1	MSME Chamber of Commerce, 301-304, 3rd floor Unique Shopping Mall, Murthal Rd, Sonipat	Sh. Mahavir Parsad Jain (President) Sh. Rajender Parsad Jain (General Secretary)	9416694181 9873349835	Rpjain2051@gmail.com Msme2025@gmail.com
2	Kundli Industrial Association, 130, HSIIDC, Kundli, Sonepat	Mr. Arvind Chaudhary (President) Sh. Subash Gupta (Vice President)	09811229022 9215134134	AKC@advanceventilation.com Kia.kundli@gmail.com
3	G.T. Road Industrial Area Association C/o Mercury Rubber Mills, G.T. Rd. Rasoi	Sh. S.K. Singhal (President) Sh. Ajay Mahajan	08810209798 9810038400	gtriass@gmail.com ajay@northlandrubber.com
4	Rai Industries Association, 1802, HSIIDC, Rai	Sh. A.P. Chhabra (President) Sh. Vinod Arora (Gen Sec.)	09313208022 09810098170	Rakeshchhabra07@gmail.com Rmp.india59@gmail.com
5	Rai Industrial Area Mfg. Association, 168, HSIIDC, Rai	Sh. Rakesh Devgan (President)	09812039101	devgunrakesh@gmail.com riemarai@gmail.com
6	Sonipat Industrial Area Association E-40, I.A. Sonepat	Sh. Bhagwan Gupta (President) Sh. Ajit Singh, (Gen. Secretary)	09896111022 9812016408	Info@foampe.com keyessco@yahoo.com
7	Barhi Industrial Area Association, 130, I.E., HSIIDC, Barhi	Sh. S.P. Keshan (President)	09312606019 09810029099	shivkeshan@gmail.com
8	Murthal Industrial Manufacturers Association, plot no. 11-12, HSIIDC, Murthal, Sonepat	Kirpal Singh (President) Harish Narsaria (Gen Sec.)	9812995842 9811113797	kanwalengineering86@gmail.com harishnarsaria@gmail.com
9	HSIIDC Indl. Estate Mfg. Association, 33, HSIIDC, I.E. Sonepat	Sh. Sanjay Dalal (President) Sh. Rajinder Malik (Gen. Sec.)	9416118645 09354876151	Dalalsanjay11@gmail.com
10	Barhi Industries Estate Manufacturers Association 367, Barhi Part-I, Sonepat	Sh. Rajender Singhla (President) Sh. Sanjay Jain (Gen. Sec.)	09416060732 09350132274	Rp.singla11@gmail.com jainsanjaychilly@gmail.com
11	Nathupur Industrial Area Association, C/o Everest	Sh. Rakesh Bajaj (President)	09810027497	rakeshbajaj@everestcables.com

	Cables (P) Ltd. Nathupur	Sh. Manoj Seth (Gen. Sec.)	09810094233	manujseth@hotmail.com
12	Small Scale Industrial Manufacturers Association, 1482, IA, Rai Sonepat	Sh. Mahender Goel (President) Sh. R C Gupta (Gen Sec.)	9810456426 9654369100	manishpackers@gmail.com Guptaramesh1950@gmail.com
13	Kundli Cold Storage and Warehousing Association	Atul Goel (President) Anil Aggarwal (Gen Sec.)	9953687712 9212411505	kundlicoldware@yahoo.in
14	Gohana Industrial Area Association	Ved Parkash Jain	9996943330	
15	Firozpur Kharkhoda Industrial Association	Sh. Deepak Panchal, (President)	9671313004	Deepak.kumar@ajitindustries.com
16	Liwaspur Sultanpur Bahalgarh Industries Association, Sonepat	Sh. T. N. Tiwari	9812281984	tnt@goldenrolls.com
17	Livaspur Bahalgarh Industrial Association, Sonepat	Sh. P. K. Jain (President) Sh. R K Gupta (Gen Sec)	9991115353 9312991919	
18	Greater Kundli Narela Rd, Industrial Association, Pio Maniyari, Sonepat	Sh. Ritesh Bajaj (President) Dr. Pawan Gupta, (Secretary)	9876347070 9811207758	ritesh@bajajfoodgroup.com reliablelubeoils@rediffmail.com
19	Haryana Chamber of Commerce & Industries, Sonepat Chapter	Sh. Rakesh Devgan, (President) Sh. Ramesh Vadhva , (Secretary)	09812039101 9812042847	devgunrakesh@gmail.com
20	Sonepat Rural Industrial Association VPO- Saidpur Kharkhoda, Sonepat	Sh. Naresh Pawar Sh. Parvin Jain	9350203090 9810034448	jainpkus@yahoo.com
21	Dhaturi Industries Association C/O Chemline India Ltd. Vill. Dhaturi, P. O. Bighan, Dist. Sonepat, Haryana	Dr. Ravindra N Goel, (President) Sh. P. P. Singh, (General Secretary)	9650609609 9996631057	commercial@chemlineglobal.com ppsingh@hindustantin.co.in
22	Rai Food Park Association Rai, Sonepat	Sh. Sanjay Gupta, (President) Sh. Anup Goyal, (Secretary)	9810016763 9810891734	Sanjay.gupta@tirupatifood.com Anoop.goyal@agropure.net
23	HSIIDC Phase – I Industrial Association, Barhi	Sh. Shamsher Sharma	9215614210	shamshersharmabjp@gmail.com
24	Stainless Steel Utensils Manufacturer Association, Kundli.	Sh. Pawan Kansal, (President)	9811178827	pawan@jagdambaflatware.com
25	Ram Nagar Industrial Association	Sh. K.L. Taneja, (President)	9992222998	Kltaneja97@gmail.com
26	Ayush Manufacturers Association	Sh. Nishchal Pruthi (Gen. Sec.)	9812030816	
27	Laghu Udhyog Baharati Sonepat	Madan Lal Gandhi, (President) Bhupinder Sharma, (Gen Sec.)	7015324562 9355570777	

28	Barhi Industrial Welfare Association	Sh. Aman Goel	9215615717	touche.in@gmail.com

12. KEY ISSUES OF THE INDUSTRIES

- Lack of access to finance for MSMEs owing to complexity in procedural approvals & documentation requirements.
- MSMEs lack know-how of modern marketing techniques such as e-commerce/ digital marketing/ pricing analytics/ brand-building etc.
- Lack of trained & skilled workforce often leading to shortage in manpower required.
- Low collaboration between institutions & enterprises.
- Inadequate technology upgradation.
- Lack of knowhow on latest market trends & information.

13. POTENTIAL AREAS OF INTERVENTION

- Industries department may take a lead on discussing the issue of easing the access to finance for MSMEs at State level banker's committee meeting with a view to reduce procedural/ documentation complexity.
- DIC Sonipat may conduct seminars for MSMEs on modern marketing techniques such as Brand building, Digital Marketing etc.
- DIC may take a lead on finding collaboration opportunities between the technical institutes in the district such as Polytechnics/ ITIs/ Engineering colleges and the local industry.

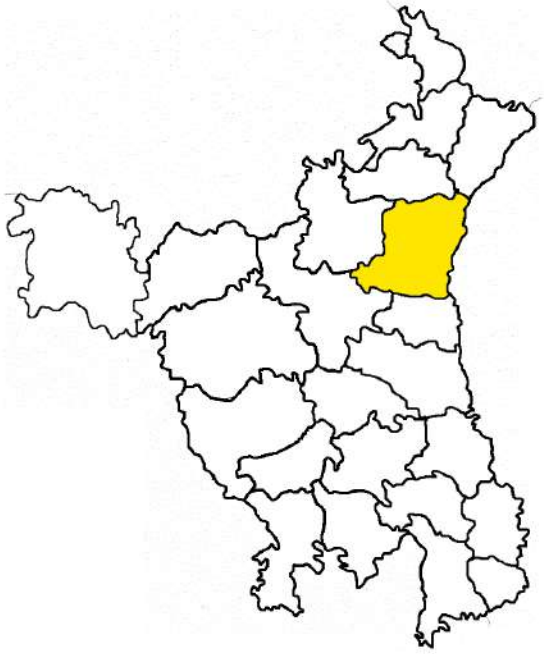
14. POTENTIAL AREAS OF INVESTMENT

- 'Wearing Apparel' is a significant sector in the district with 1262 units currently, and significant growth in last 3 years. The sector offers attractive investment opportunity in branded retailing of product sourced from the district and advanced apparel designing/printing facilities.
- 'Food products' is another fast-growing sector in the district with 567 units currently operational, 240 of whom have started operations in last 3 years. The sector has significant investment potential in facilities providing raw material

supplies for food industry such as preservatives, additives, flavors, and also downstream food product units such as ready-to-cook/ready-to-eat foods etc.

05. Karnal

District Profile



EXECUTIVE SUMMARY

District Profile

MSME Scenario

05

Karnal

Famous for....

"Rice Exports"

1 MSMEs in Karnal

Total number of MSME units 3,010

New MSME units (last 3 years) 1,274

Food Products, Machinery & Equipment, Textiles, Wearing Apparel, Chemical & Chemical Products

Top 5 sectors – Maximum number of MSMEs

2 Investment Scenario in Karnal

Total Investment (INR Lakhs) 1,47,575

New Investment (last 3 years; INR Lakhs) 44,625

Food Products, Machinery & Equipment, Textiles, Pharmaceutic-als, Chemicals & Chemical Products

Top 5 sectors – Maximum investment by MSMEs

3 Employment Scenario in Karnal

Total Employment 26,424

New Employment (last 3 years) 7,462

Food Products, Machinery & Equipment, Wood & Products of Wood, Pharmaceuti-cals, Chemicals & Chemical Products

Top 5 sectors – Most employment generated

4 Potential for MSMEs

Food products sector presents opportunity for investment in high-technology supply chain services, organized product retailing, downstream products etc.

Pharma & Ayurveda sector offers investment opportunity in manufacturing of products such as Chemicals, extracts, other Active Pharmaceutical Ingredients & Excipients etc.

5 Others

Total Exports (FY 18-19; INR Lakhs) 8,47,618

Number of Large & Mega units 9

Existing Clusters 2 Mini Clusters, 6 MSE-CDP Clusters

1. INTRODUCTION

Karnal is one of the oldest districts in Haryana and was one of its earliest 7 districts when Haryana State was formed in 1966. The district lies on the national highway 44 which is the longest national highway in India. The district is famous for its Rice exports and also known for a well-developed MSME ecosystem across sectors such as Food products, Machinery, Textiles, Pharma, Ayurveda etc.

1.1 Geography

Karnal lies towards the north-east of the Haryana state, and is surrounded by Kurukshetra & Yamunanagar on the north, Uttar Pradesh in the east, Panipat & Jind on the south and Kaithal in the west. The district is largely flat and lies along the Haryana plains on the eastern side. The district has a generally southwards slope.

Karnal has hot summers, cold winter, and dry-air climate and receives rainfall mostly in monsoon season (July to September) with some unreliable rainfall in winter season because of western disturbances. Yamuna river forms the eastern boundary of the district providing ample water resources for irrigation. Chantang nala flowing from north to south-west part of the district is key water resource. Soil found in the district is known to be sandy to fine sandy loams at surface and clayey loam at depth.

1.2 Demographic Profile

As per the census of 2011, total population of Karnal is 15,05,324 with a population density of 597 people per sq. KM. Rural to urban percentage distribution is 69.79% & 30.21% respectively. Karnal has an average literacy rate of 74.73% with male literacy rate of 81.82% and female literacy rate of 66.82%. The district has a higher female to male ratio at 887 females per thousand males, compared to the state average of 877 but significantly lower than the national average of 940.

1.3 Administrative Set-up

Karnal has a total land area of 2520 Sq. Km. The district has 5 Tehsils (Indri, Nilokheri, Karnal, Assandh and Gharaunda), 3 Sub-tehsils, 4 sub-divisions, 8 development blocks, 382 Panchayats and around 435 villages.

The following table shows categorization of blocks as per the status of industrial development.

Table 37: **[Karnal]** Categorization of Blocks

Block A	Block B	Block C	Block D
	Karnal	Assandh	
	Gharaunda	Indri	
	Nilokheri	Nissing at Chirao	
		Kunjpura	
		Munak	

2. SECTOR WISE MSME LANDSCAPE

Following table shows the total number of MSME units in each sector, in Karnal, along with the bifurcation of number of micro, small and medium enterprises.

The table also shows number of new units that started their commercial production in the last three financial years.

Table 38: **[Karnal]** No. of MSME Units in each Sector

S. No.	Industry	Total Units	Micro	Small	Medium	New Units (Last 3 Years)
Food, Beverages & Tobacco						
1	Food products	1140	744	382	14	518
2	Tobacco products	2	1	1	0	1
Textiles & Apparel						
3	Textiles	152	111	38	3	72
4	Wearing apparel	140	130	10	0	68
Leather, Wood & paper						
5	Leather and related products	81	76	5	0	34
6	Wood and products of wood and cork, except furniture; articles of straw and plaiting materials	90	75	14	1	36
7	Paper and paper products	87	65	21	1	27
8	Furniture	77	66	11	0	34
Pharma, Petro-Chemicals, Rubber products						
9	Pharmaceuticals, medicinal chemical and botanical	100	69	30	1	55

	products					
10	Chemicals and chemical products	127	99	28	0	62
11	Manufacture of coke and refined petroleum products	16	9	7	0	8
12	Rubber and plastics products	78	54	24	0	37
Metals & Mineral Products						
13	Basic metals	26	20	6	0	9
14	Fabricated metal products, except machinery and equipment	50	42	7	1	19
15	Non-metallic mineral products	64	56	7	1	38
Electrical, Electronics & Machinery						
16	Computer, electronic and optical products	30	27	3	0	13
17	Electrical equipment	100	88	11	1	2
18	Machinery and equipment	169	111	56	2	9
Automotive & Auto-Components						
19	Motor vehicles, trailers and semi-trailers	9	9	0	0	6
Other Manufacturing						
20	Other manufacturing	472	401	71	0	226

Following scatter diagram shows the comparison between total units in each sector vis-a-vis new units opened in the last 3 financial years (except for food products sector which with 1140 units is an outlier).

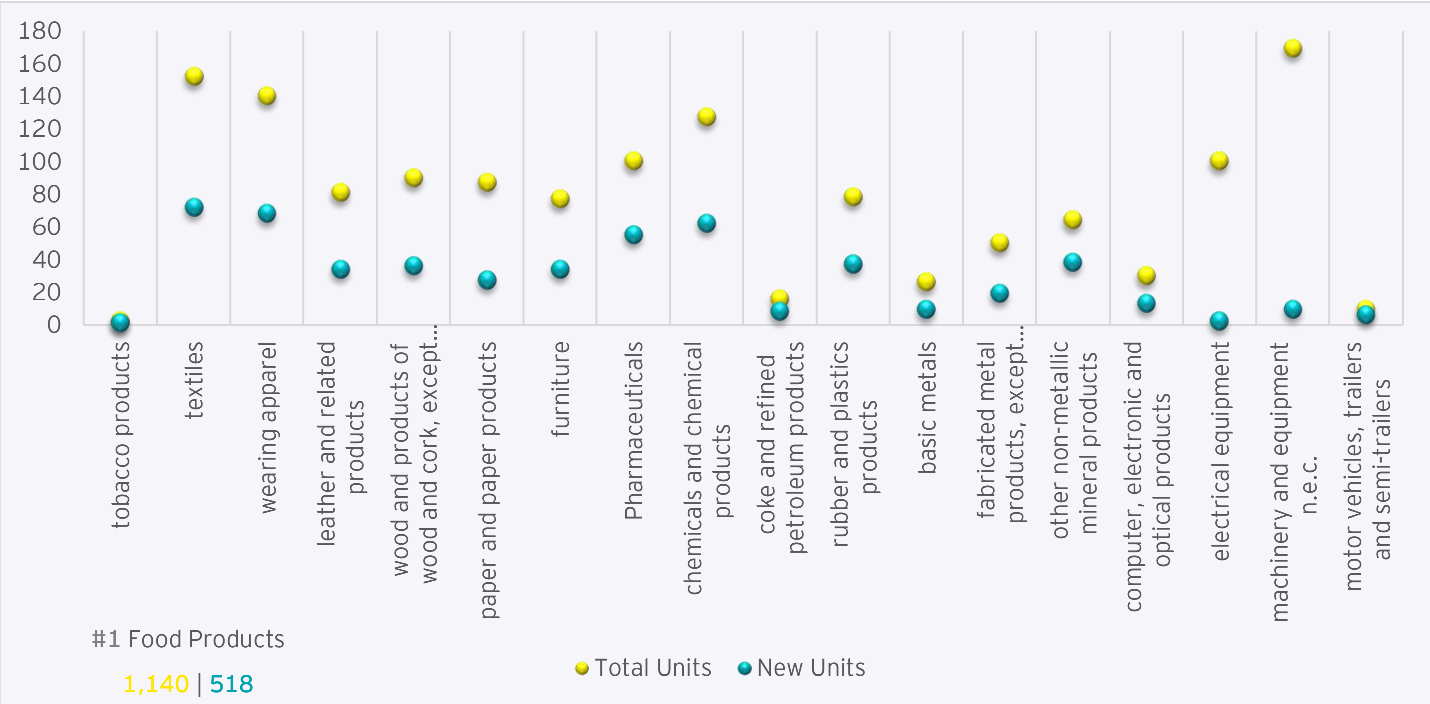


Figure 37: **[Karnal]** Total Units & New Units in each Sector

2.1 Top 10 Sectors: Based on Number of Units

Following table shows top ten sectors in Karnal, based upon the total number of MSME units in the district.

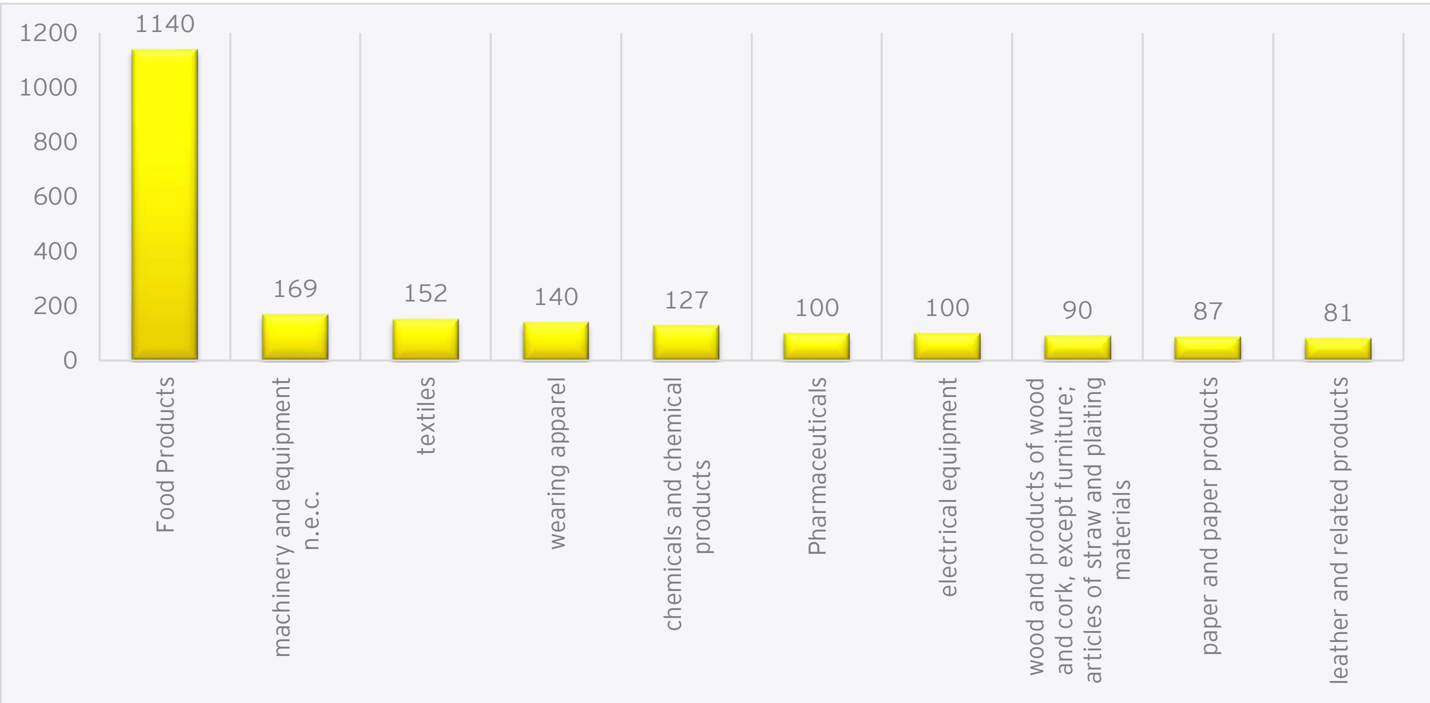


Figure 38: **[Karnal]** Top 10 sectors - Total No. of MSME Units

2.2 Top 10 Sectors: Based on New Units in Last 3 Years

Following table shows the top ten sectors in Karnal, based upon number of new MSME units set-up in the last three years.

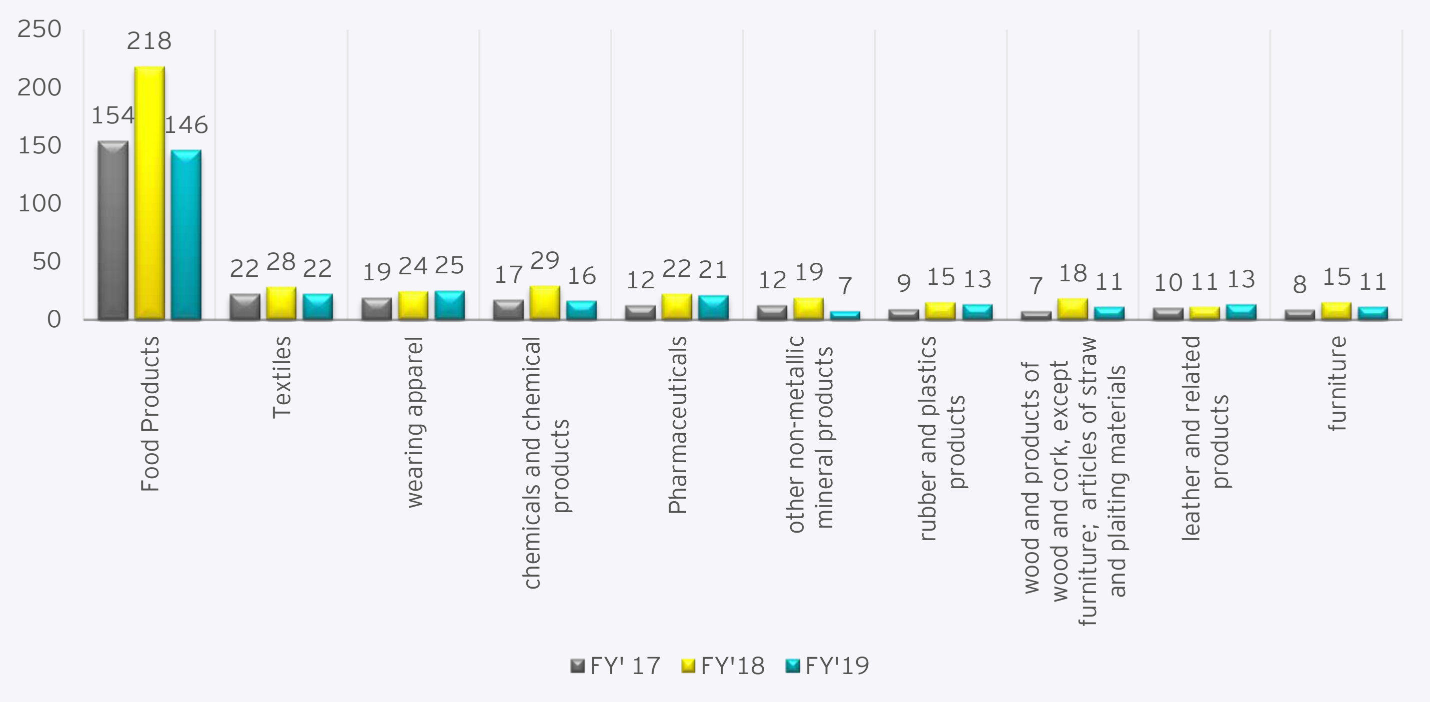


Figure 39: **[Karnal]** Top 10 Sectors - New Units in Last 3 Years

Key Takeaways

- Maximum no. of MSME units in Karnal are involved in food products (1140), machinery & equipment (169), followed by textile (152).
- Apart from food products, machinery & equipment, textiles, wearing apparel, chemical & chemical products have significant number of MSMEs operating out of Karnal.
- In last three years also, 'food products' sector has seen maximum number of new MSME units opened (518), followed by textiles (72) & wearing apparel (68).
- In terms of percentage growth, 'motor vehicles, trailers & semi-trailers' has experienced impressive recent growth with 66.66% of the total units having opened up in the last 3 years, followed by non-metallic mineral products 59.38%.

3. SECTOR WISE INVESTMENT SCENARIO

Punjab National Bank is the convener bank of State Level Bankers' Committee (SLBC) in Haryana and also the district lead bank of Karnal.

Following table shows the total investment by MSMEs in each sector in Karnal, along with new investment in the last three financial years (figures are in Lakhs).

Table 39: **[Karnal]** Total Investment by MSMEs

S. No.	Industry	Investment (INR Lakhs)				
		Total Investment	FY'17	FY'18	FY'19	New Investment (Last 3 Years)
Food, Beverages & Tobacco						
1	Food products	90963	10416	13374	4019	27809
2	Tobacco products	63	0	1	0	1
Textiles & Apparel						
3	Textiles	6453	870	776	465	2111
4	Wearing apparel	1420	136	224	364	724
Leather, Wood & paper						
5	Leather and related products	1380	85	31	86	202
6	Wood and products of wood and cork, except furniture; articles of straw and plaiting materials	2420	41	285	119	445
7	Paper and paper products	3193	360	60	68	488
8	Furniture	1188	55	129	433	617
Pharma, Petro-Chemicals, Rubber products						
9	Pharmaceuticals, medicinal chemical and botanical products	5310	457	1906	228	2591
10	Chemicals and chemical products	3251	188	198	539	925
11	Manufacture of coke and refined petroleum products	860	73	201	93	367
12	Rubber and	2945	471	183	216	870

	plastics products					
Metals & Mineral Products						
13	Basic metals	881	0	41	63	104
14	Fabricated metal products, except machinery and equipment	2230	26	125	668	819
15	Non-metallic mineral products	2285	78	358	253	689
Electrical, Electronics & Machinery						
16	Computer, electronic and optical products	320	100	12	11	123
17	Electrical equipment	2708	390	40	0	430
18	Machinery and equipment	8985	530	235	587	1352
Automotive & Auto-Components						
19	Motor vehicles, trailers and semi-trailers	90	24	5	20	49
Other Manufacturing						
20	Other manufacturing	10630	1626	1162	1121	3909

Following scatter diagram shows a comparison of total MSME investment and new investment in the last 3 financial years, across different sectors of Karnal (except for food products sector which is an outlier with high investments).

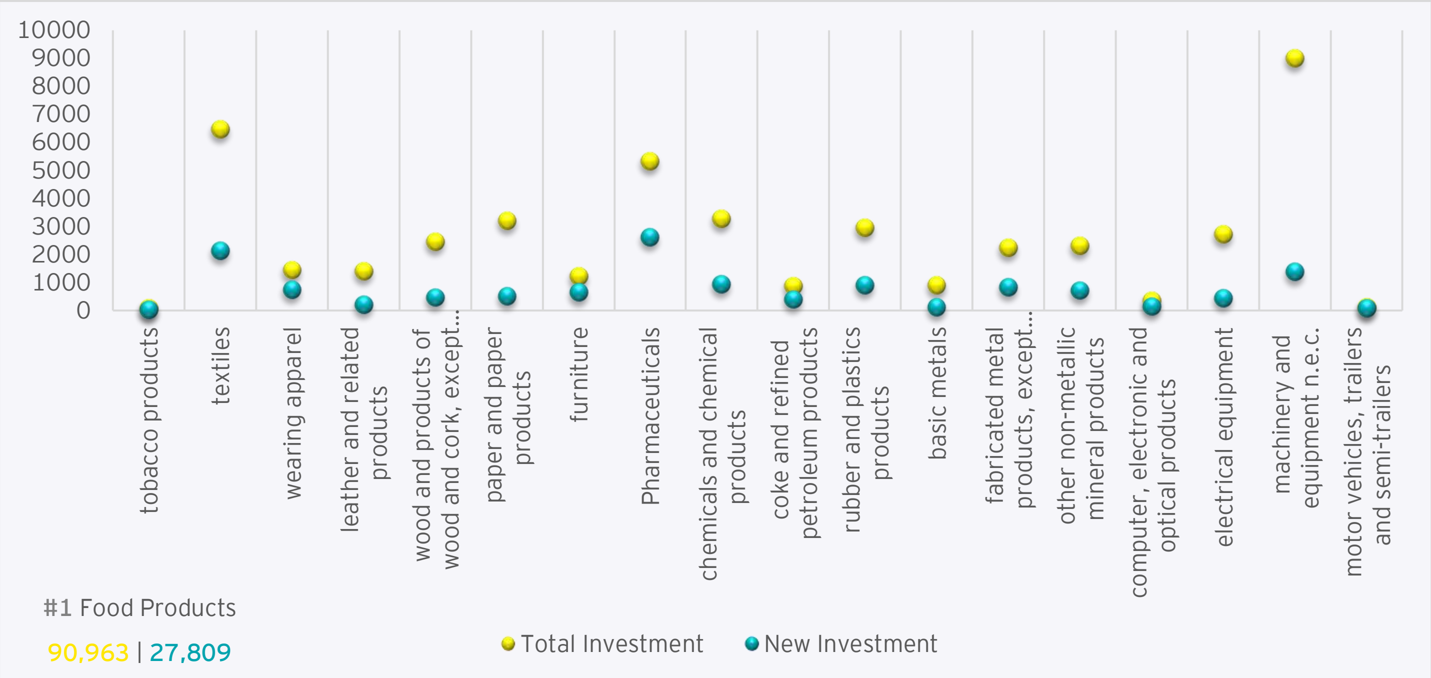


Figure 40: **[Karnal]** Total Investment & New Investment in Last 3 Financial Years (FY'17-FY'19)

Following pie-chart showcases the sectors that have attracted maximum investments in the last 3 financial years (figures are in Lakhs).

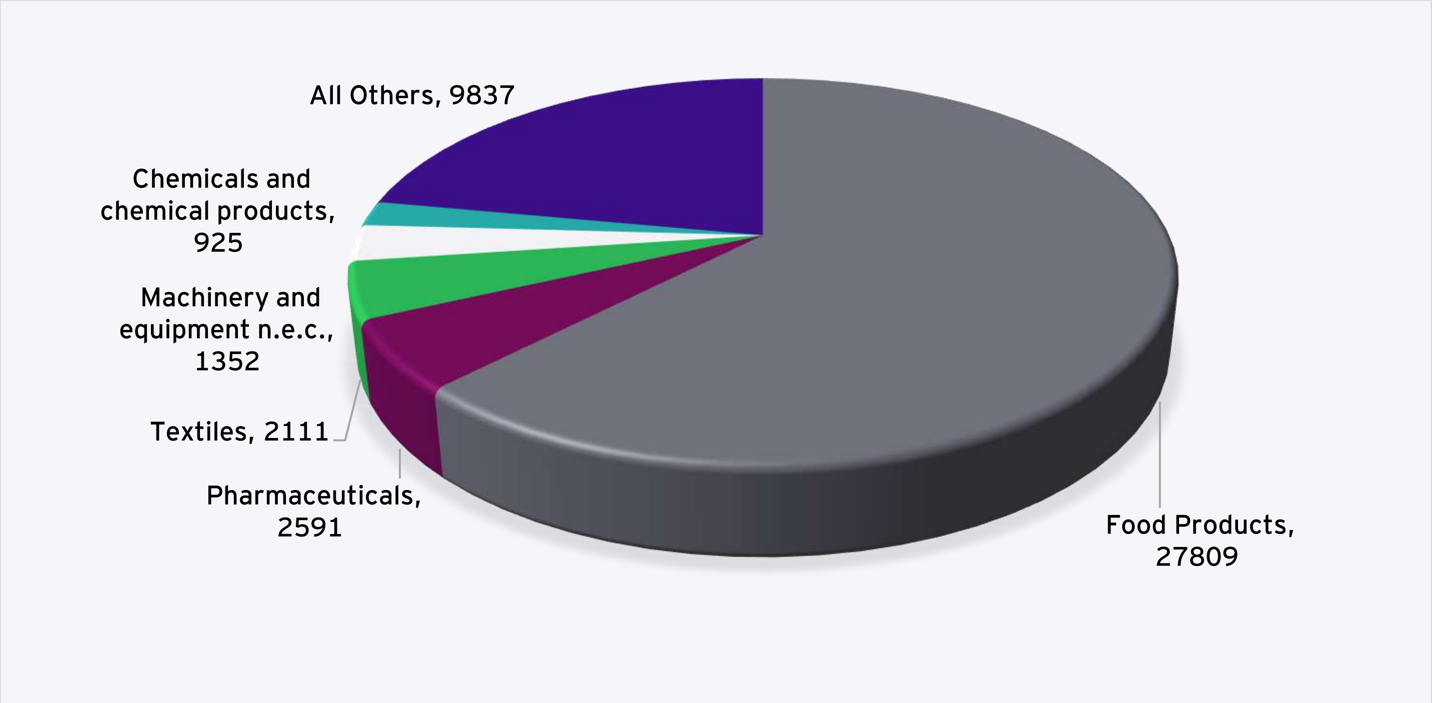


Figure 41: **[Karnal]** Top 5 Sectors with maximum investment in last 3 Financial Years (FY'17-FY'19)

Following diagram shows a comparison of compound annual growth rate of various sectors for last three financial years.

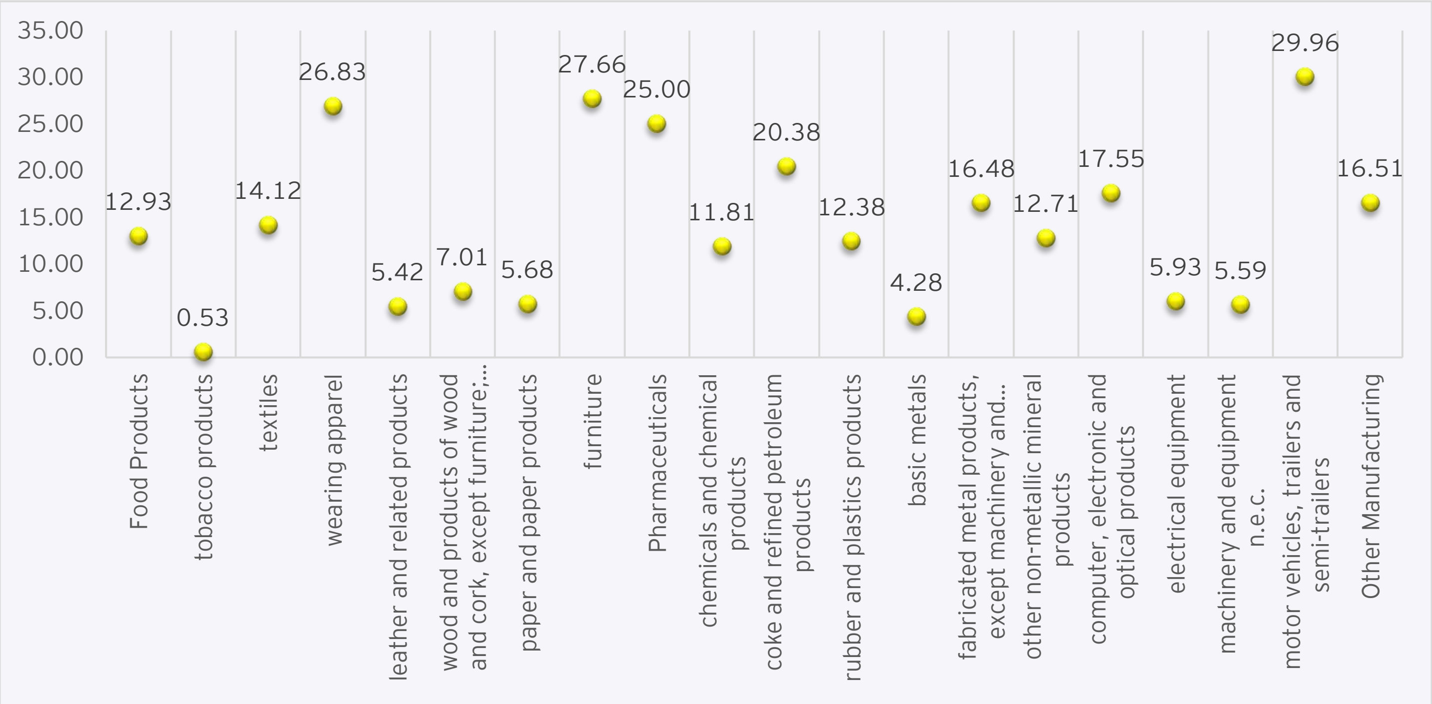


Figure 42: **[Karnal]** CAGR for Last 3 Financial Years (FY'17-FY'19)

Key Takeaways

- Highest amount of investment by MSMEs in Karnal has been in food products sector INR 909.63 Cr, followed by machinery & equipment sector (INR 89.85 Cr).
- Food Products sector apart from having the highest total investment (INR 909.63 Cr), has also seen maximum investment in last three financial years (INR 278.09 Cr) followed by the pharma sector (INR 25.91 Cr).
- As evident apart from food products & pharma, textiles, machinery & equipment and chemical & chemical products have attracted the maximum investments in last three financial years.
- Sectors with high CAGR in MSME investments in last 3 FYS are: motor vehicles, trailers and semi-trailers (29.96%), furniture (27.66%), wearing apparel (26.83%), pharma (25.00%) & coke & refined petroleum products (20.38%).

4. SECTOR WISE EMPLOYMENT SCENARIO

Below table showcases the total employment created by MSMEs in each of the sectors, along with new employment created in the last three financial years.

Table 40: **[Karnal]** Total Employment in each Sector

S. No.	Industry	Total Employment	FY'17	FY'18	FY'19	New Employment (Last 3 Years)
Food, Beverages & Tobacco						
1	Food products	10584	999	1515	650	3164
2	Tobacco products	6	0	2	0	2
Textiles & Apparel						
3	Textiles	978	208	145	149	502
4	Wearing apparel	569	62	89	93	244
Leather, Wood & paper						
5	Leather and related products	662	74	52	85	211
6	Wood and products of wood and cork, except furniture; articles of straw and plaiting materials	1404	28	54	28	110
7	Paper and paper	598	58	33	30	121

	products					
8	Furniture	422	28	72	63	163
Pharma, Petro-Chemicals, Rubber products						
9	Pharmaceuticals, medicinal chemical and botanical products	1181	87	230	104	421
10	Chemicals and chemical products	1049	81	135	97	313
11	Manufacture of coke and refined petroleum products	104	29	24	15	68
12	Rubber and plastics products	668	62	127	70	259
Metals & Mineral Products						
13	Basic metals	136	0	10	18	28
14	Fabricated metal products, except machinery and equipment	692	16	109	62	187
15	Non-metallic mineral products	680	104	256	71	431
Electrical, Electronics & Machinery						
16	Computer, electronic and optical products	317	31	9	6	46
17	Electrical equipment	662	20	8	0	28
18	Machinery and equipment n.e.c.	2522	55	20	64	139
Automotive & Auto-Components						
19	Motor vehicles, trailers and semi-trailers	26	2	3	5	10
Other Manufacturing						
20	Other manufacturing	3164	282	403	330	1015

Following scatter diagram shows a comparison of total employment across different MSME sectors and new employment generated in the last 3 financial years (except for food products sector with total employment of '10584' and new employment of '3164', which being an outlier cannot be represented with other sectors).

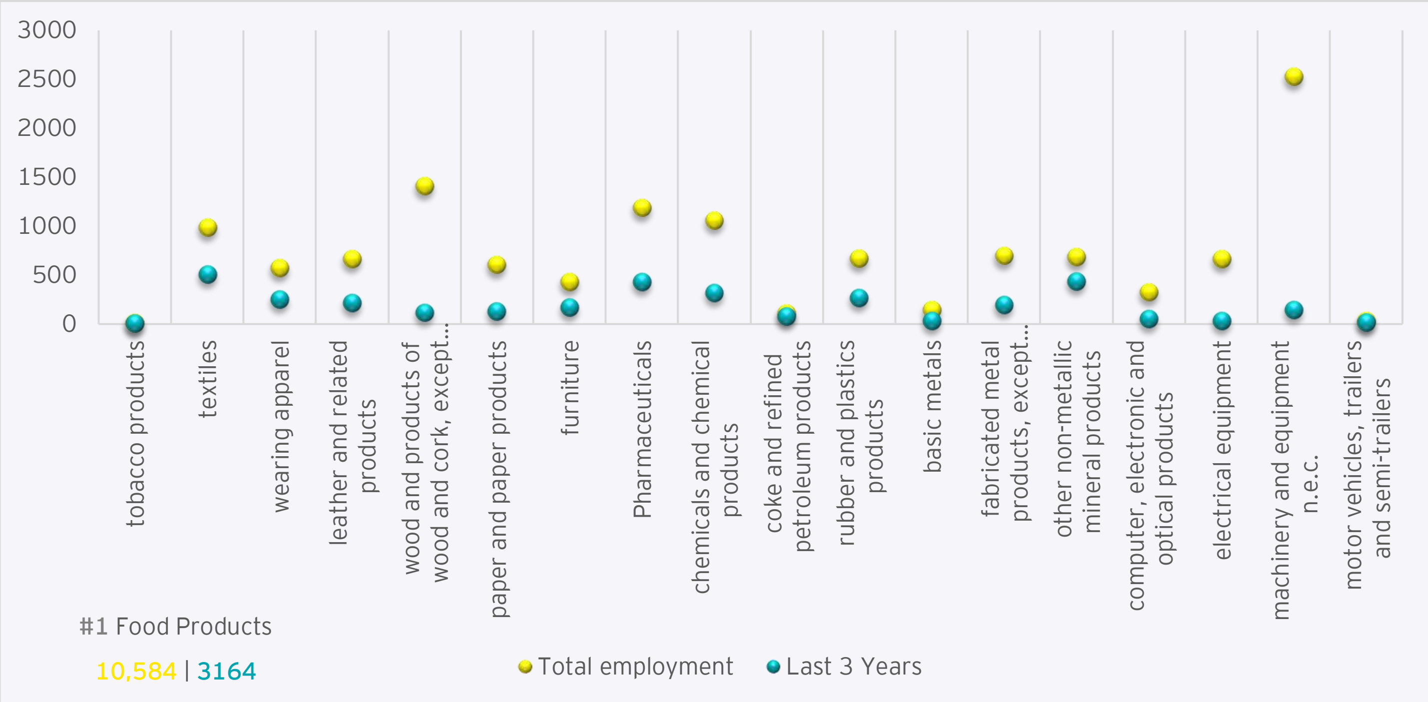


Figure 43: **[Karnal]** Total Employment & New employment in last 3 Financial Years (FY'17-FY'19)

Following bar chart showcases category wise per unit employment analysis for MSMEs in Karnal.

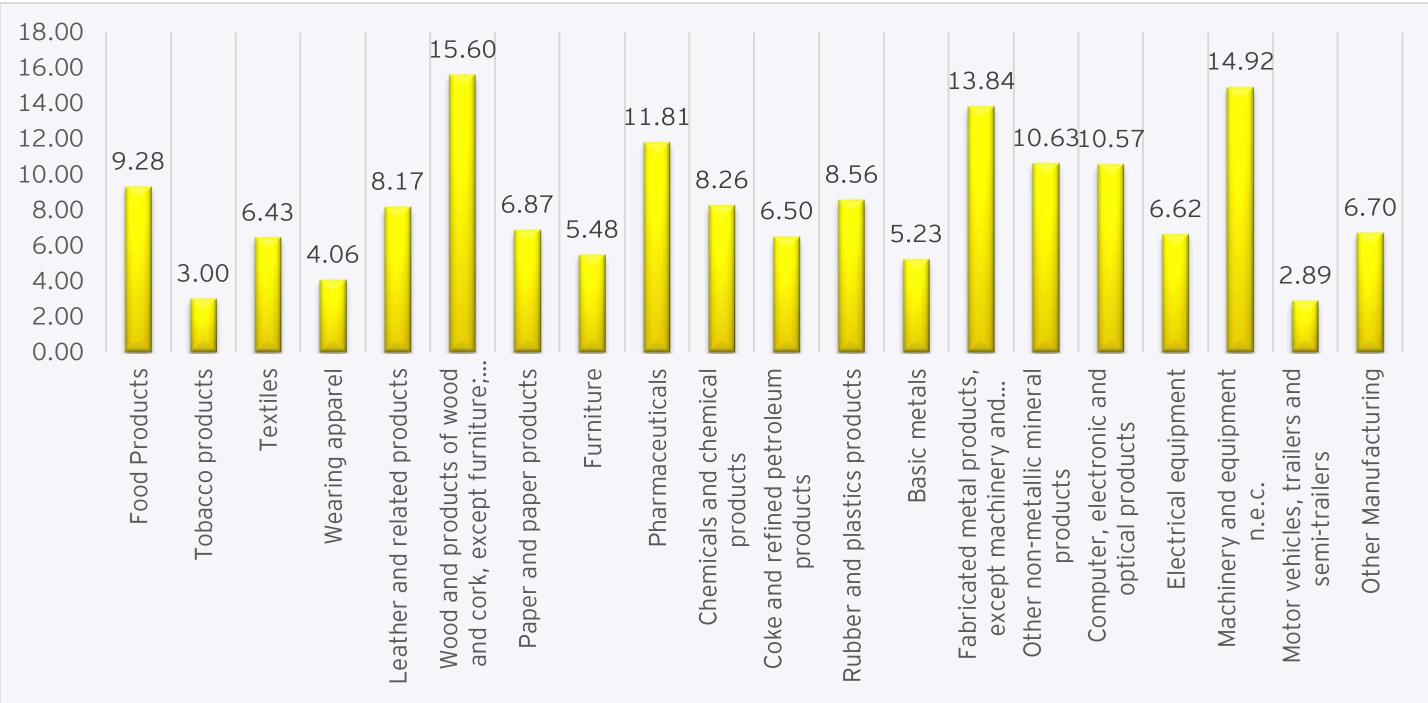


Figure 44: **[Karnal]** Category wise employment intensity

Following pie-charts showcase the sectors that have created maximum employment in each of the last 3 financial years.

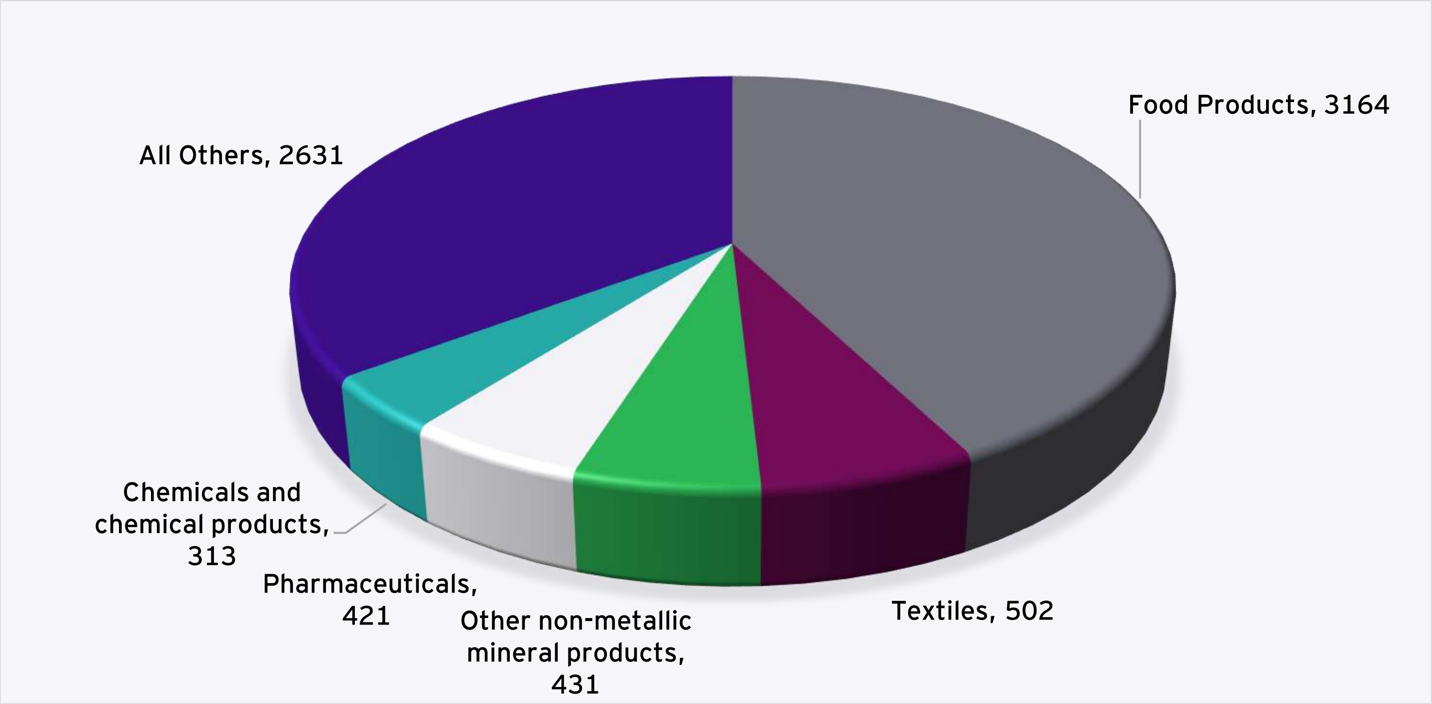


Figure 45: **[Karnal]** Top 5 Sectors with maximum new employment in last 3 Financial Years (FY'17-FY'19)

Key Takeaways

- Food products MSME sector provides the maximum employment (10,584) followed by machinery & equipment sector (2,522) & wood and products of wood except furniture products sector (1,404).

- Apart from food products sector, textiles sector has created the maximum new employment in last 3 years (502), followed by non-metallic mineral products (431) and pharma (421). Sectors such as motor vehicles, electrical equipment, basic metals have experienced relatively low growth in new employment.

- Wood & wood products except furniture have maximum employment intensity with an average of 15.60 employees per unit, followed by machinery & equipment with 14.92 employees per unit and fabricated metal products at 13.84 employees per unit.

- Motor vehicles, trailers & semi-trailers sector has the least employment intensity with only 2.89 employees per unit, followed by tobacco products at 3.00 employees per unit.

- Food products sector has created the maximum employment in Karnal in last three financial years (3164), followed closely by textiles (502). Other sectors in top 5 in terms of employment creation are non-metallic mineral products (431), pharma (421) & chemicals & chemical products (313).

5. EXPORTS FROM THE DISTRICT

Key exports products from Karnal include Rice & Agri Implements. Following table shows some of the exports from Karnal for last 3 FYs.

(The export data in the table shows only exports related information that is available at the District Industries Centre, Karnal, and actual exports figure might be significantly higher).

Table 41: Exports from Karnal

S. No.	Industry	Exports (INR Lakhs)		
		FY'17	FY'18	FY'19
1	Rice	459908	758002.83	493256.6
2	Carpets	7969.66	19457.5	NA
3	Agri Implements	8252.16	10983.3	12977.74
4	Pharmaceuticals	24	2139.89	2191.47
5	Other Manufacturing	4831.47	5271.54	3949.85

6. NATURAL RESOURCES & RAW MATERIAL AVAILABLE

Major raw materials available in Karnal include agricultural materials such as Rice & Wheat, Animal Products such as Dairy, Fisheries, Poultry etc. & raw wood.

Other key agricultural produce from the district apart from Rice & Wheat include Millets, Barley, Maize, Pulses such as Arhar, Chickpeas, Lentils, Green Gram, Black Gram, Sugarcane & Cotton.

Karnal has a total forest cover of around 75.79 sq. km and the main flora consists of Eucalyptus, Sheesham, Neem, Kikar, Muscat, Neem, Jamun etc.

7. KEY INDUSTRIAL ESTATES

Karnal currently has three industrial areas as follows:

- Industrial Area, Sector 3, 71.59 Acres
- Industrial Area, Sector 3 A, 81.98 Acres
- Industrial Area, Sector 3 (extn.), 59.78 Acres
- Industrial Area, Sector 37, 204 Acres

- HSIIDC, Kalka, Pinjore

Plot Details of above Industrial Estates are as under:

Total Carved Out Plots	755
Allotted Plots	377
Un allotted Plots	378
Units in Production	287
Key Products Manufactured	Pharma, Home Care, Agricultural Implements, Electrical Equipment, Paints, Footwear etc.

8. MAJOR LARGE-SCALE UNITS

Apart from MSMEs, Karnal also has some Large & Mega enterprises operational in various sectors. Below table showcases number of Large & Mega enterprises in each sector along with their names.

Table 42: **[Karnal]** Large & Mega Units in each Sector

S. No.	Industry	Number	Names of Large & Mega Units
1	Beverages	2	• RSL Distilleries • Haryana Liquor
2	Food Products	6	• Ebro India • Aroma Agrotech Pvt. Ltd. • Modern Diaries • D.D. International • Piccadily Agro • HAFED
3	Fabricated Metal Products	1	• Beri Udyog

9. SERVICES SECTOR SNAPSHOT

Karnal has significant number of MSMEs operating in the services sector also.

Below table gives a snapshot of the services sector in Karnal:

Table 43: **[Karnal]** Services Sector Snapshot

S. No.	Industry	Total Units	Micro	Small	Medium	Total Investment (INR Lakhs)	Total employment
1	Civil Engineering	35	23	12	0	866	549
2	Construction of building	43	36	7	0	319	214
3	Electricity, gas, steam and air conditioning supply	5	2	3	0	75	23
4	Office administrative, office support and other business support activities	162	147	15	0	857	692
5	Other professional, scientific and technical activities	226	186	40	0	1826	1030
6	Repair and installation of machinery and equipment	79	65	14	0	607	293
7	Specialized construction activities	42	34	7	1	740	715
8	Architecture and engineering activities; technical testing and analysis	31	26	5	0	205	173
9	Financial service activities, except insurance and pension funding	73	65	8	0	404	258
10	Food and beverage service activities	492	440	49	3	4011	2137
11	Mining support service activities	4	4	0	0	21	10
12	Repair of computers and personal and household goods	190	172	18	0	1067	481

13	Warehousing and support activities for transportation	71	42	29	0	1670	407

10. CLUSTERS SCENARIO

Following is the list of clusters in Karnal under the State Mini-Cluster Development Scheme of Haryana. A grant of INR 30 Lakhs has already been released for the Bakery Cluster.

Table 44: Mini Clusters in Karnal

S. No.	Mini Clusters	Location	Cluster Identification	DSR Preparation	DPR Preparation	Implementation
1	Bakery Cluster	Karnal	√	√	√	√
2	Agriculture Implements Cluster	Karnal	√	√	√	

Apart from mini-clusters, Karnal has one of the highest concentration of MSE-CDP clusters in North India, details of which are as follows:

Table 45: MSE-CDP Clusters in Karnal

S. No.	MSE-CDP Clusters	Location	Cluster Identification	DSR Preparation	DPR Preparation	Implementation
1	Pharma Cluster	Karnal	√	√	√	√
2	Print-Pack Cluster	Karnal	√	√	√	√
3	Plastic Packaging Cluster	Karnal	√	√	√	√
4	Signage Cluster	Karnal	√	√	√	
5	Dairy Cluster	Karnal	√	√	√	
6	Ayurveda Cluster	Karnal	√	√	√	

11. INDUSTRY ASSOCIATIONS

Following is the list of Industry Associations in Karnal.

Table 46: Industry Associations in Karnal

S. No.	Name of the Association	Address	Name	Designation	Mob No.	Email
1	Haryana Chamber of Commerce & Industry (Karnal Unit)	Plot No. 353, Sector-3, HSIIDC, Karnal	Sh. R.L. Sharma	President	9996666565	statesrvphcci@gmail.com
2	Karnal HSIIDC Industries Welfare Association	Plot No. 56/c, Sec-3, HSIIDC, Karnal	Sh. R.L. Sharma	Chairman	9996666565, 01842293424	jrsoryxpharma@gmail.com
3	Karnal Rice Miller Association	M/s Shri Giriraj Rice Mill, Kambopura, Madhuban	Sh. Neeraj Kumar	President	9034060001	shrigirirajoverseas@gmail.com
4	Karnal Rice Miller Association	M/s Real Agro Foods, Rasulpur Kalan	Sh. Vinod Goel	President	9215730633	realagrofoods521@gmail.com
5	Karnal Agricultural Implements Mfg. Association	353,354, M/s Krishna Agro Industries Nr Sewa Samiti Ashram, Arjun Gate, Karnal	Sh. Ravinder Dhall	President	9812033160	agriimpexho@gmail.com
6	Karnal Pharmaceutical Manufacturers Association	M/s Medox Pharma 26/3 IE, HSIIDC, Karnal	Sh. R.L. Sharma	President	9996666565, 01842293424	kpmakarnal@gmail.com
7	Tarori Rice Miller Association	M/s Bansal Rice Mill, Tarori	Sh. Naresh Bansal	President	9896662456	bmbasmati@gmail.com
9	Haryana Rice Exporter Association	M/s Veer Overseas Ltd., G.T. Road	Sh. Sushil Kumar Jain	President	9813080452	info@veeroverseas.com
10	Laghu Udyog Bharti	261, Sec-3, HSIIDC, Karnal	Praveen Gulati	President	9812069726	lubkarnal@gmail.com

11	M/s Karnal Dairy CFC Pvt. Ltd.	36, Agro Park, Kunjpura, Karnal	Pankaj Bharti	President	9416032005	pankaj@bharties.com
13	Haryana Vyapar Mandal	Plot No. 45, Nehru Palace, Karnal	Krishan Lal Taneja	President	9812355566	hkinfradzone@gmail.com
14	Entrepreneur Club, Karnal	Plot No. 4, Block- D, Agro Park, Karnal	Dinesh Bharti	President	9416032004	skilltechconsultancy@gmail.com
15	Bakery CFC	17, Mughal Majra, Agro Park, Karnal	Sanjay Gupta	President	9896307502	karnalbakerycfc@gmail.com
16	Signage CFC	60, Old Ramesh Nagar, Karnal	Naresh Saluja	President	9896347333	signagecfckarnal@gmail.com
17	Plastpack CFC	121, sec-3, HSIIDC, Karnal	Vinay Taneja	President	9416000026 / 9812053552	plasticcfc@gmail.com

12. KEY ISSUES OF THE INDUSTRIES

MSMEs in Karnal have raised following issues which they are currently facing:

- Need for a policy/solution to zoning violations in Industrial Estates.
- Expensive allotment rates of plots in Karnal which MSMEs find it hard to afford (Rates have been raised from 3500/ Sq. Mtr to 13500/ Sq. Mtr in Karnal).
- Request for increase of FAR from 150% to 200% in Industrial Estates.
- Need for development of new Industrial Areas in Karnal.
- Exorbitant High circle rates fixed by Revenue Authorities in Karnal.
- Proposal to transfer maintenance of Industrial Estates from HSIIDC to the municipal corporation.
- Request for relief from Interest on HSIIDC enhancement costs.
- Need for increase of ground coverage to Industry.

13. POTENTIAL AREAS OF INTERVENTION

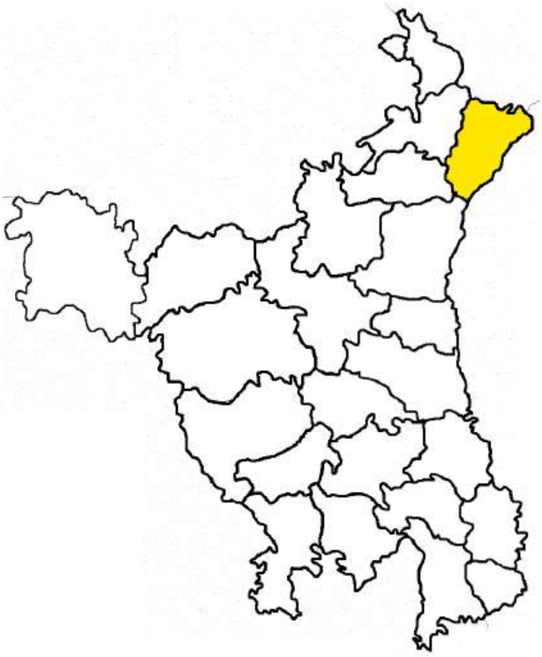
- Plot rates may be subsidized for manufacturing MSMEs to give further boost to this sector.
- Floor areas ratio policy may be revisited & revised.
- HSIIDC can identify new areas to be developed for industrial use.
- Strict policy for penalizing zoning violations required.
- Plans need to be made towards proper maintenance of Industrial estates.

14. POTENTIAL AREAS OF INVESTMENT

- One of the major Industries in Karnal is the 'Food Products' sector with around 1140 MSME units currently operational along with 6 Large enterprises. One of the major potential areas of Investment in Karnal is high-technology supply chain services such as raw materials & finished goods Warehousing, cost-competitive third-party Logistics etc. Another attractive area of investment is forward linkage opportunities such as manufacturing of downstream products, and organized product retailing in new markets.
- Pharma & Ayurveda sector presents another attractive opportunity, it being a high growth sector in Karnal with more than 50 new units starting operations in last 3 Years. There is significant investment opportunity in manufacturing of upstream value chain products such as Chemicals, extracts, other Active Pharmaceutical Ingredients & Excipients required as raw materials in Pharma Industry.

06. Yamunanagar

District Profile



EXECUTIVE SUMMARY

District Profile

MSME Scenario

06

Yamunanagar

Famous for....

"Plywood & Utensils Industry"

1 MSMEs in Yamunanagar

Total number of MSME units	2,568
New MSME units (last 3 years)	861

Wood & products of wood; Food Products; Fabricated Metal Products; Basic Metals; Wearing Apparel

Top 5 sectors – Maximum number of MSMEs

2 Investment Scenario in Yamunanagar

Total Investment (INR Lakhs)	1,09,550
New Investment (last 3 years; INR Lakhs)	35,377

Wood & products of wood; Food Products; Fabricated Metal Products; Machinery & Equipment; Paper & paper products

Top 5 sectors – Maximum investment by MSMEs

3 Employment Scenario in Yamunanagar

Total Employment	31,508
New Employment (last 3 years)	7,902

Wood & products of wood; Food Products; Fabricated Metal Products; Machinery & Equipment; Basic Metals

Top 5 sectors – Most employment generated

4 Potential for MSMEs

Plywood industry in Yamunanagar offers investment opportunity in supply chain services for these units such as transportation & warehousing, design services, downstream marketing services such as retailing/ e-commerce etc.

Metal utensils MSME industry offers opportunity for branded retailing of products, and raw material supply to these units

5 Others

Total Exports (FY 18-19; INR Lakhs)	38,076
Number of Large & Mega units	9
Existing Clusters	3 MSE-CDP Clusters

1. INTRODUCTION

Yamunanagar, earlier a part of district Ambala, was carved out as a separate district in November 1989. The district is located on the Ambala - Roorkee highway no. 344 and is well connected to neighboring states of Himachal & Uttar Pradesh. Yamunanagar is a famous industrial hub for plywood, utensils & metal products.

1.1 Geography

Yamunanagar lies in the north of the Haryana state, and is surrounded by Ambala on the west, Kurukshetra & Karnal on the south, Himachal Pradesh (Sirmaur) district on the north, and Uttar Pradesh (Saharanpur district) on the east. Northern tracts of the district are sub-mountainous and lie along the foothills of the Shivalik range in Himachal Pradesh.

Yamunanagar has subtropical monsoon temperate, generally warm & mild climate and receives significant rains in winters apart from monsoons. The river Yamuna defines the eastern boundary of the district with Uttar Pradesh. Markanda river which is a tributary of river Ghaggar also flows through Yamunanagar. Soil types found in Yamunanagar are Eurtrochrepts (shallow & loamy sands) in the Shivalik foothills & Haplaquepts (water logged soils with clay loam texture) in Yamuna plains.

1.2 Demographic Profile

As per the census of 2011, total population of Yamunanagar is 12,14,162 persons with a population density of 687 per sq. km. It constitutes approximately 4.79% of total Haryana population. Rural to urban percentage distribution is 61.06% & 38.94% respectively. Average literacy rate of Yamunanagar is 77.99% with a male literacy rate of 83.84% and female literacy rate of 71.38 %. The district has a female to male ratio at 877 females per thousand males, which is equal to the state average of 877 and significantly lower than the national average of 940. Population growth for Yamunanagar for the decade 2001-2011 is 16.57%.

1.3 Administrative Set-up

Yamunanagar has a total land area of 1768 Sq. Km. The district has four tehsils namely Jagadhari, Bilaspur, Radaur and Chhachhruali. Yamunagar also has 3 sub-divisions, 3 sub-tehsils, 7 blocks, 471 Gram Panchayats and 655 Revenue villages.

The following table shows categorization of blocks as per the status of industrial development.

Table 47: **[Yamunanagar]** Categorization of Blocks

Block A	Block B	Block C	Block D
	Jagadhri	Bilaspur	Sadhaura
		Chhachhrauli	
		Radaur	
		Mustafabad	
		Khizrabad	

2. SECTOR WISE MSME LANDSCAPE

Following table shows the total number of MSME units in each sector, in Yamunanagar, along with the bifurcation of number of micro, small and medium enterprises.

The table also shows number of new units that started their commercial production in the last three financial years.

Table 48: **[Yamunanagar]** No. of MSME Units in each Sector

S. No.	Industry	Total Units	Micro	Small	Medium	New Units (Last 3 Years)
Food, Beverages & Tobacco						
1	Food products	475	339	136	0	173
2	Beverages	8	5	3	0	4
3	Tobacco products	1	0	1	0	0
Textiles & Apparel						
4	Textiles	45	39	6	0	14
5	Wearing apparel	114	114	0	0	76
Leather, Wood & paper						
6	Leather and related products	18	17	1	0	9
7	Wood and products of wood and cork, except furniture; articles of straw and plaiting materials	647	235	412	0	209
8	Paper and paper products	70	40	29	1	25
9	Furniture	63	61	2	0	23
Pharma, Petro-Chemicals, Rubber products						
10	Pharmaceuticals, medicinal	35	31	3	1	17

	chemical and botanical products					
11	Chemicals and chemical products	47	31	16	0	16
12	Manufacture of coke and refined petroleum products	4	4	0	0	2
13	Rubber and plastics products	61	45	13	3	15
Metals & Mineral Products						
14	Basic metals	143	102	40	1	31
15	Fabricated metal products, except machinery and equipment	221	147	74	0	32
16	Non-metallic mineral products	69	53	16	0	40
Electrical, Electronics & Machinery						
17	Computer, electronic and optical products	14	12	2	0	8
18	Electrical equipment	59	48	10	1	21
19	Machinery and equipment	110	64	45	1	20
Automotive & Auto-Components						
20	Motor vehicles, trailers and semi-trailers	13	9	4	0	8
21	Other Transport Equipment	6	4	2	0	2
Other Manufacturing						
22	Other manufacturing	310	260	50	0	106
23	Repair & Installation of machinery & equipment	35	33	2	0	10

Following scatter diagram shows the comparison between total units in each sector vis-a-vis new units opened in the last 3 financial years.

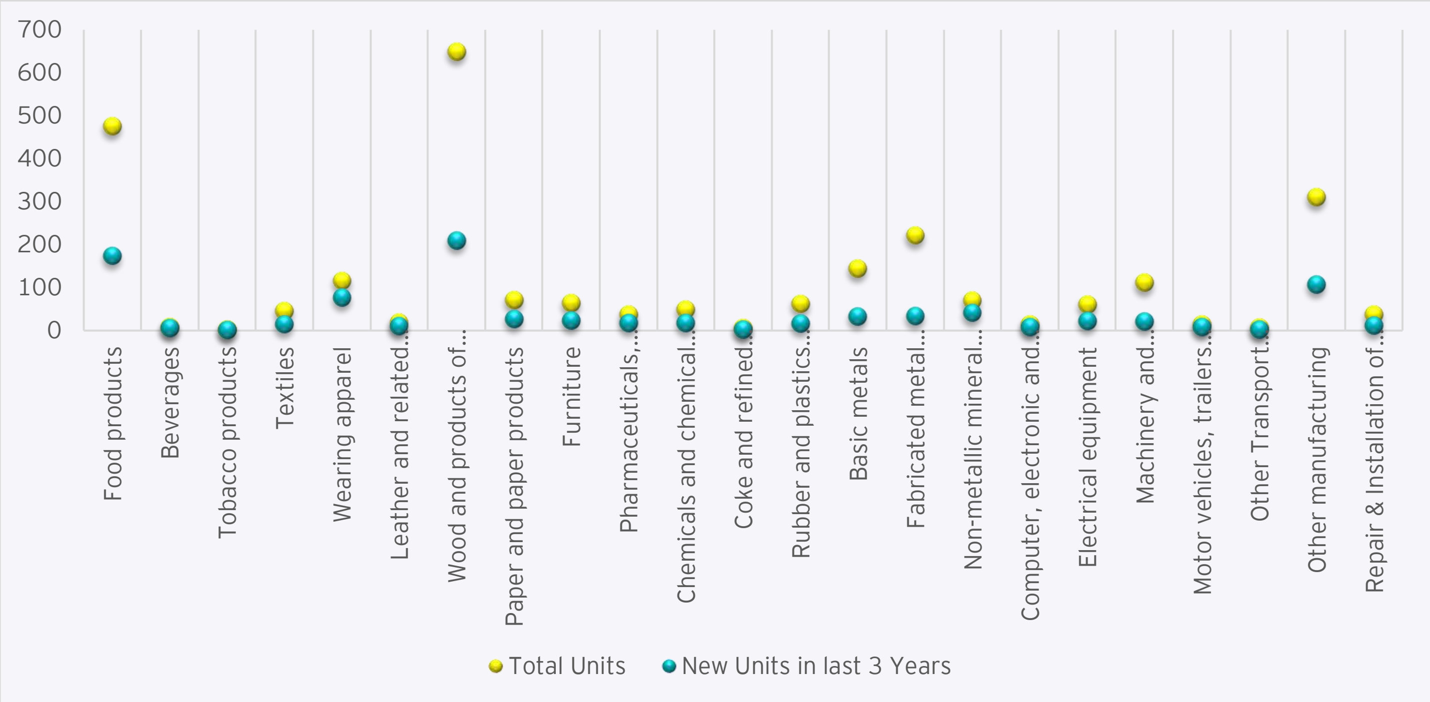


Figure 46: **[Yamunanagar]** Total Units & New Units in each Sector

2.1 Top 10 Sectors: Based on Number of Units

Following table shows top ten sectors in Yamunanagar, based upon the total number of MSME units in the district.

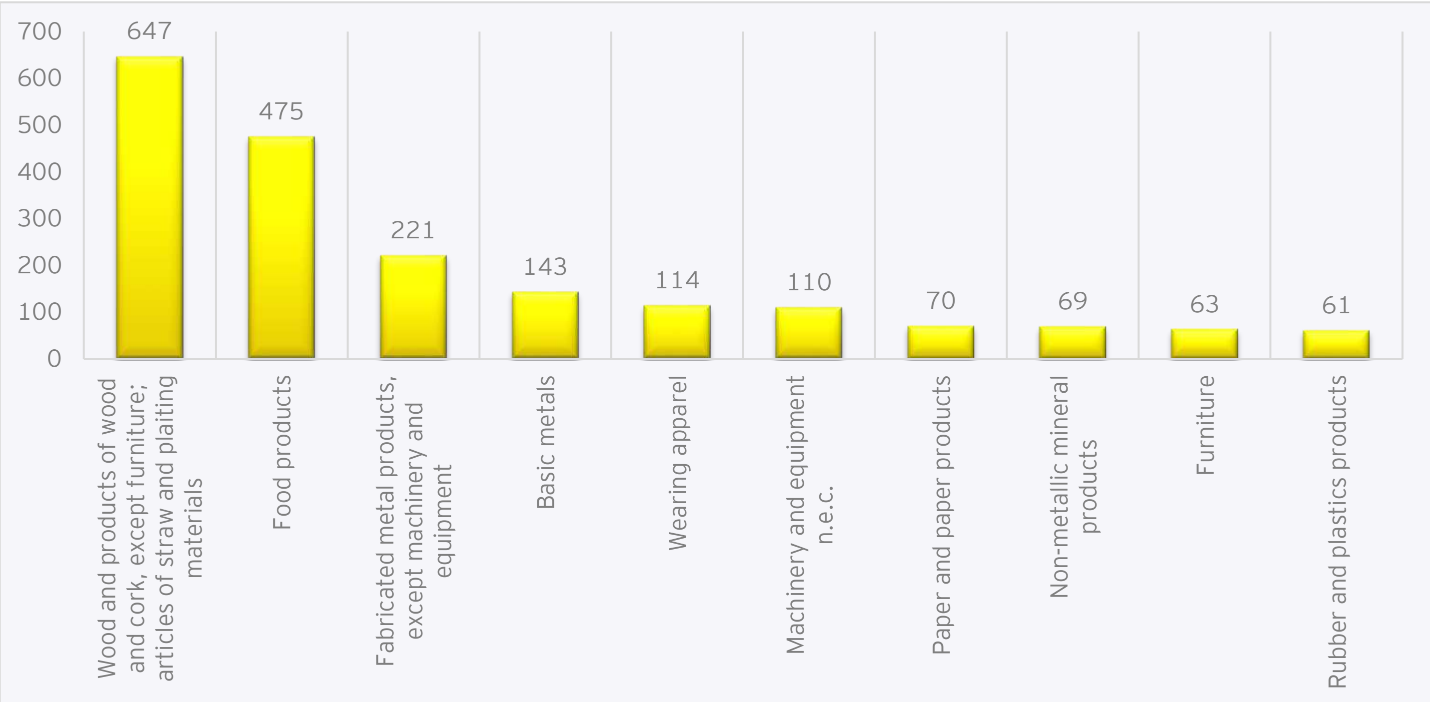


Figure 47: **[Yamunanagar]** Top 10 sectors - Total No. of MSME Units

2.2 Top 10 Sectors: Based on New Units in Last 3 Years

Following table shows the top ten sectors in Yamunanagar, based upon number of new MSME units set-up in the last three years.

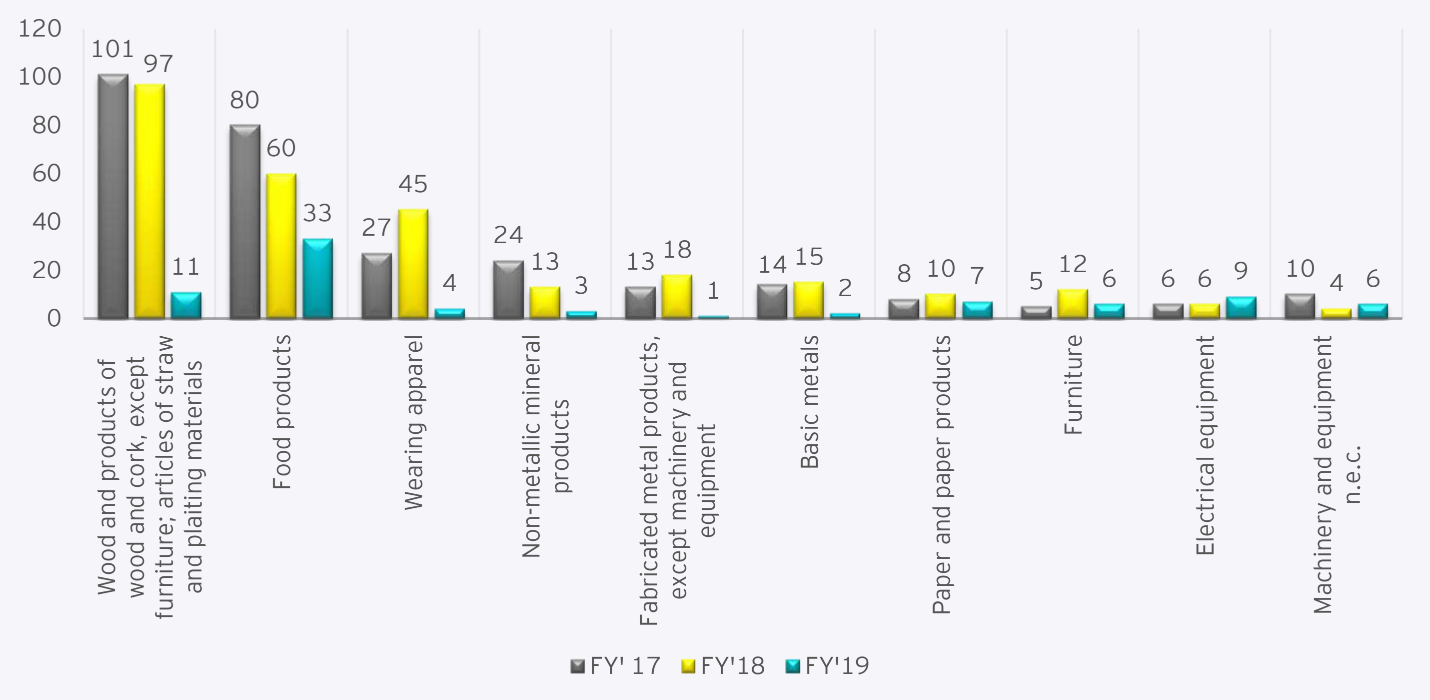


Figure 48: **[Yamunanagar]** Top 10 Sectors - New Units in Last 3 Years

Key Takeaways

- Maximum no. of MSME units in Yamunanagar are involved in the wood products sector, followed by food products.
- Apart from wood products & food products; fabricated metal, basic metal & wearing apparel have significant number of MSMEs operating out of Yamunanagar.
- In last three years also, wood products sector has seen maximum number of new MSME units opened (209), followed by food products (173) & wearing apparel (76).
- In terms of percentage growth, wearing apparel has experienced impressive recent growth with 66.67% of the total units having opened up in the last 3 years, followed by motor vehicles (61.54%) & non-metallic mineral products (57.97%).

3. SECTOR WISE INVESTMENT SCENARIO

Punjab National Bank is the convener bank of State Level Bankers' Committee (SLBC) in Haryana and also the district lead bank of Yamunanagar.

Following table shows the total investment by MSMEs in each sector in Yamunanagar, along with new investment in the last three financial years (figures are in Lakhs).

Table 49: **[Yamunanagar]** Total Investment by MSMEs

S. No.	Industry	Investment (INR Lakhs)				
		Total Investment	FY'17	FY'18	FY'19	New Investment (Last 3 Years)
Food, Beverages & Tobacco						
1	Food products	12327	2546	1309	660	4515
2	Beverages	368	0	32	0	32
3	Tobacco products	250	0	0	0	0
Textiles & Apparel						
4	Textiles	622	46	170	27	243
5	Wearing apparel	444	114	102	18	234
Leather, Wood & paper						
6	Leather and related products	134	25	17	5	47
7	Wood and products of wood and cork, except furniture; articles of straw and plaiting materials	49205	8976	10510	505	19991
8	Paper and paper products	5985	223	654	211	1088
9	Furniture	434	18	50	32	100
Pharma, Petro-Chemicals, Rubber products						
10	Pharmaceuticals, medicinal chemical and botanical products	1086	85	52	6	143
11	Chemicals and chemical products	2415	73	1107	12	1192
12	Coke and refined petroleum products	24	5	0	1	6
13	Rubber and	5347	511	55	1020	1586

	plastics products					
Metals & Mineral Products						
14	Basic metals	5209	163	648	11	822
15	Fabricated metal products, except machinery and equipment	6968	226	160	2	388
16	Non-metallic mineral products	2086	821	233	91	1145
Electrical, Electronics & Machinery						
17	Computer, electronic and optical products	375	11	28	8	47
18	Electrical equipment	2352	29	411	128	568
19	Machinery and equipment	6440	120	85	107	312
Automotive & Auto-Components						
20	Motor vehicles, trailers and semi-trailers	404	5	18	44	67
21	Other Transport Equipment	131	0	55	0	55
Other Manufacturing						
22	Other manufacturing	6683	1581	897	258	2736
23	Repair & Installation of machinery & equipment	261	18	7	35	60

Following scatter diagram shows a comparison of total MSME investment and new investment in the last 3 financial years, across different sectors of Yamunanagar (except wood products sector which being a clear outlier has not been depicted in the graph).

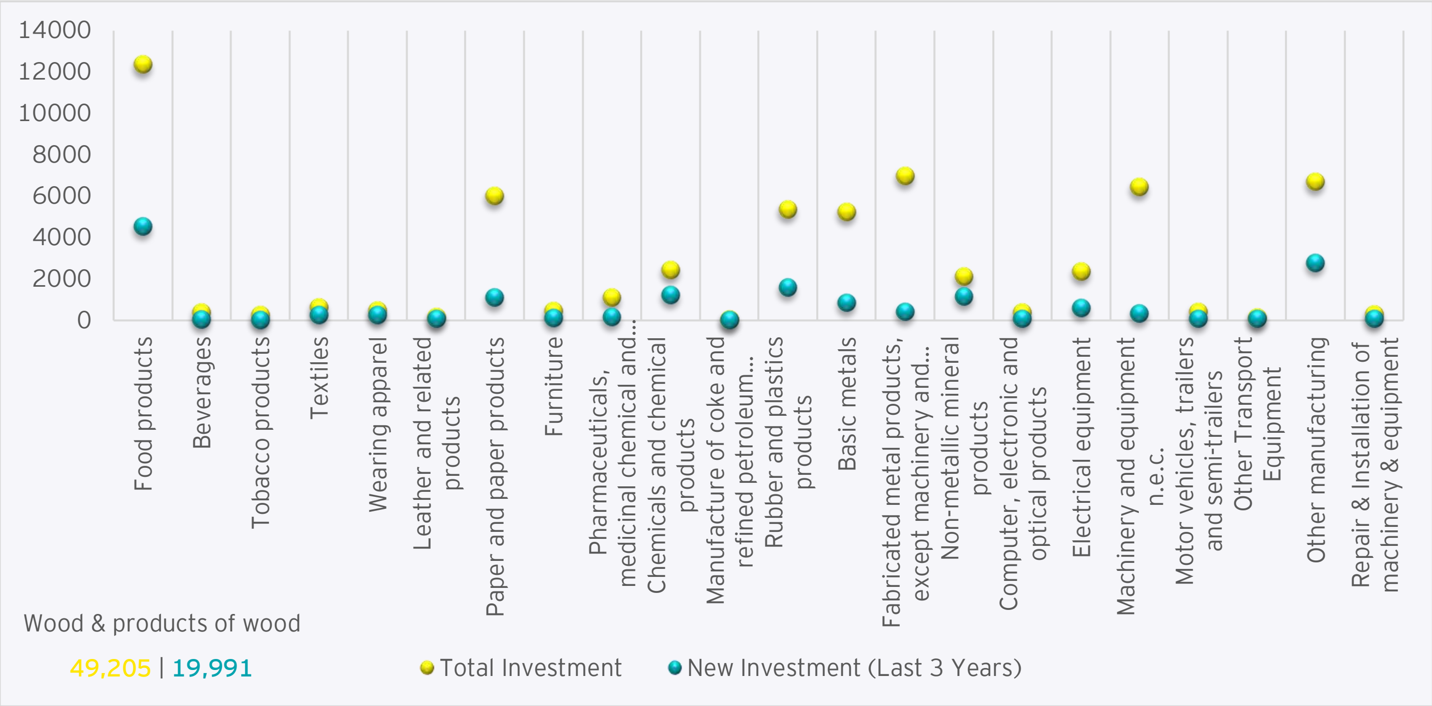


Figure 49: **[Yamunanagar]** Total Investment & New Investment in Last 3 Financial Years (FY'17-FY'19)

Following pie-chart showcases the sectors that have attracted maximum investments in the last 3 financial years (figures are in Lakhs).

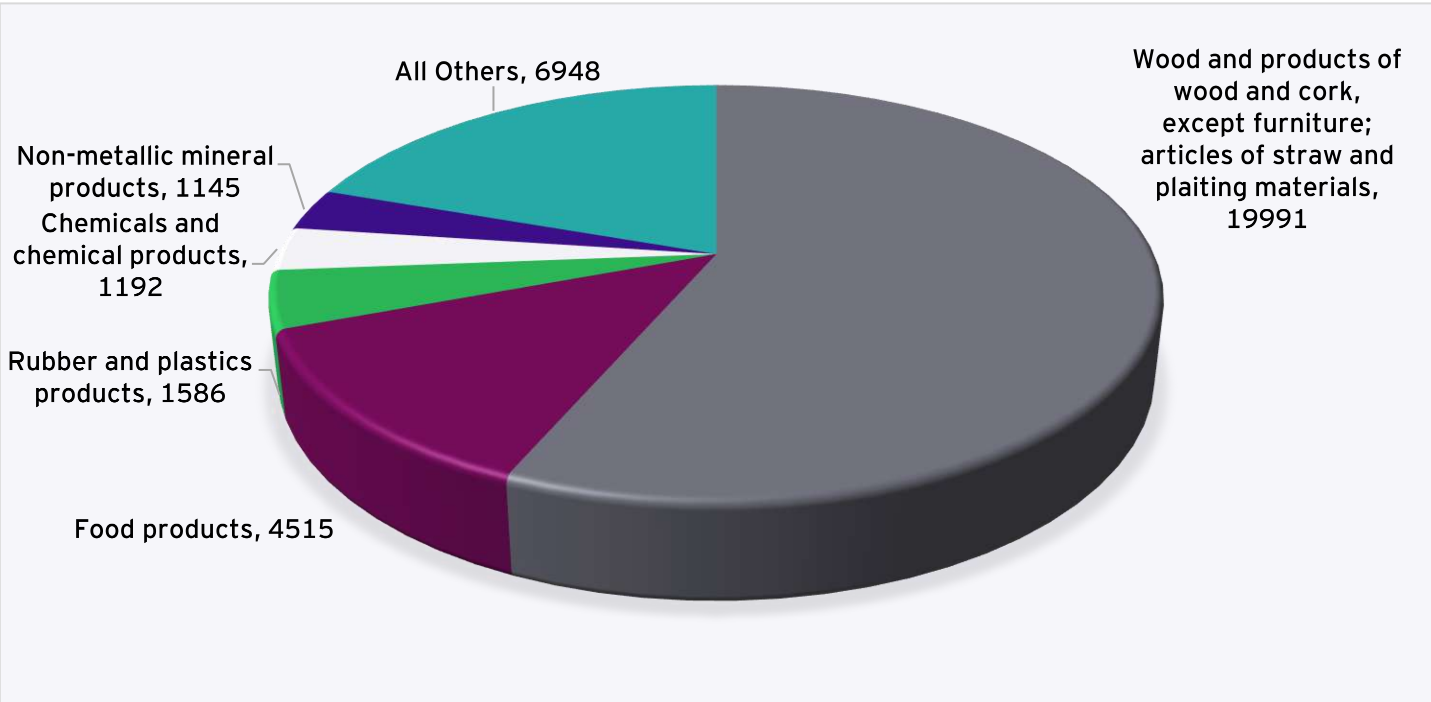


Figure 50: **[Yamunanagar]** Top 5 Sectors with maximum investment in last 3 Financial Years (FY'17-FY'19)

Following diagram shows a comparison of compound annual growth rate of various sectors for last three financial years.

Figure 51: **[Yamunanagar]** CAGR for Last 3 Financial Years (FY'17-FY'19)

Key Takeaways

- Highest amount of investment by MSMEs in Yamunanagar has been in wood products sector (INR 492.05 Cr.) followed by food products sector (INR 123.27 Cr.).

- Apart from having the highest total investment, wood products sector has also experienced highest new investment in the last three financial years at INR 199.91 Cr. followed by food products sector (INR 45.15 Cr.).

- As evident apart from wood products, food products, rubber & plastic products, chemical & chemical products and non-metallic mineral products have attracted the maximum investments in last three financial years.

- Sectors with high CAGR in MSME investments in last 3 FYS are: non-metallic mineral products (30.39%), wearing apparel (28.35%), chemical & chemical products (25.46%), other transport equipment (19.90%), wood products (18.98%).

4. SECTOR WISE EMPLOYMENT SCENARIO

Below table showcases the total employment created by MSMEs in each of the sectors, along with new employment created in the last three financial years.

Table 50: **[Yamunanagar]** Total Employment in each Sector

S. No.	Industry	Total Employment	FY'17	FY'18	FY'19	New Employment (Last 3 Years)
Food, Beverages & Tobacco						
1	Food products	3210	552	309	164	1025
2	Beverages	77	0	20	0	20
3	Tobacco products	20	0	0	0	0
Textiles & Apparel						
4	Textiles	243	31	50	5	86
5	Wearing apparel	352	70	126	12	208
Leather, Wood & paper						
6	Leather and related products	81	15	22	5	42
7	Wood and products of wood and cork, except furniture; articles of straw and plaiting materials	13752	1848	1945	97	3890
8	Paper and paper products	1133	68	86	67	221
9	Furniture	235	20	41	15	76
Pharma, Petro-Chemicals, Rubber products						
10	Pharmaceuticals, medicinal chemical and botanical products	397	21	86	6	113
11	Chemicals and chemical products	340	18	46	6	70
12	Coke and refined petroleum products	17	2	0	1	3
13	Rubber and plastics products	898	49	15	107	171
Metals & Mineral Products						
14	Basic metals	1656	71	112	21	204
15	Fabricated metal products, except	2954	99	139	5	243

	machinery and equipment					
16	Non-metallic mineral products	830	205	194	20	419
Electrical, Electronics & Machinery						
17	Computer, electronic and optical products	87	6	13	7	26
18	Electrical equipment	613	15	97	29	141
19	Machinery and equipment	2123	38	67	32	137
Automotive & Auto-Components						
20	Motor vehicles, trailers and semi-trailers	86	7	8	12	27
21	Other Transport Equipment	63	0	26	0	26
Other Manufacturing						
22	Other manufacturing	2165	344	254	120	718
23	Repair & Installation of machinery & equipment	176	20	8	8	36

Following scatter diagram shows a comparison of total employment across different MSME sectors and new employment generated in the last 3 financial years.

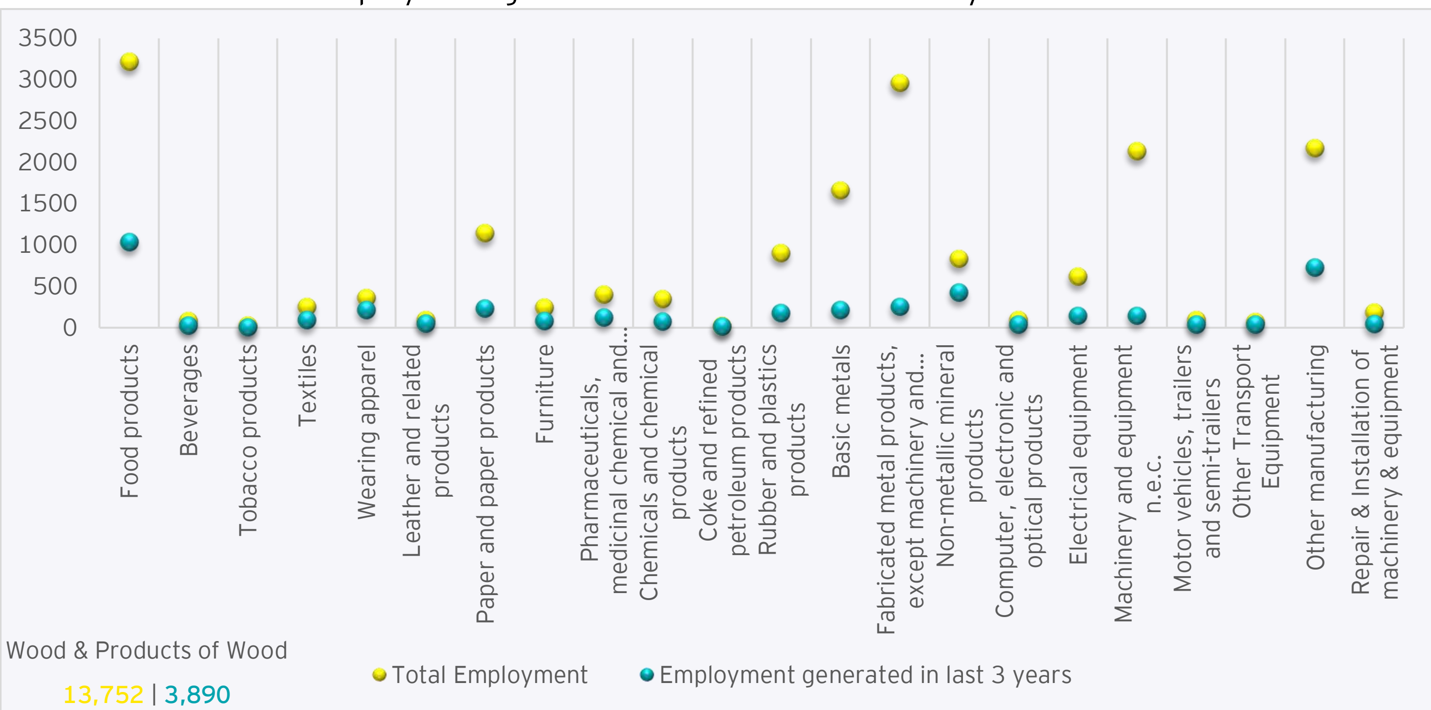


Figure 52: **[Yamunanagar]** Total Employment & New employment in last 3 Financial Years (FY'17-FY'19)

Following bar chart showcases category wise per unit employment analysis for MSMEs in Yamunanagar.

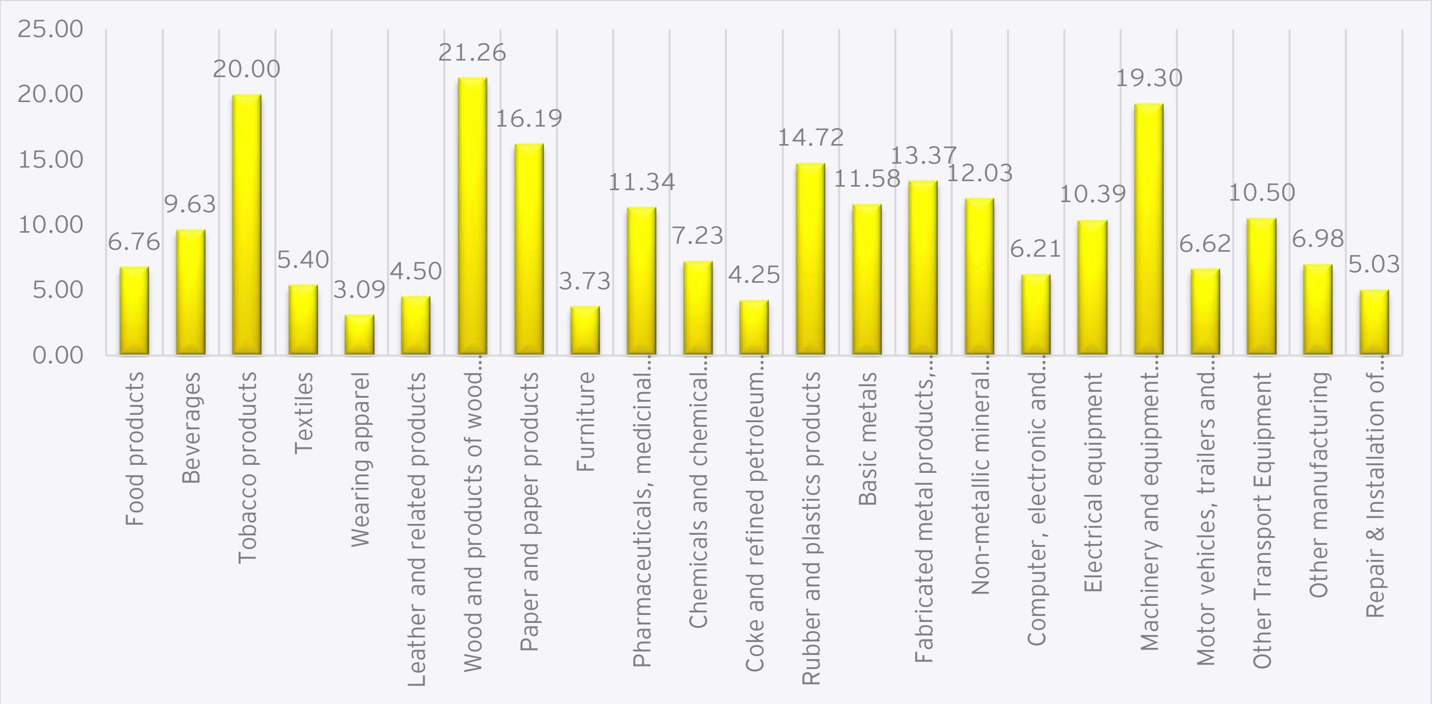


Figure 53: **[Yamunanagar]** Category wise employment intensity

Following pie-charts showcase the sectors that have created maximum employment in each of the last 3 financial years.

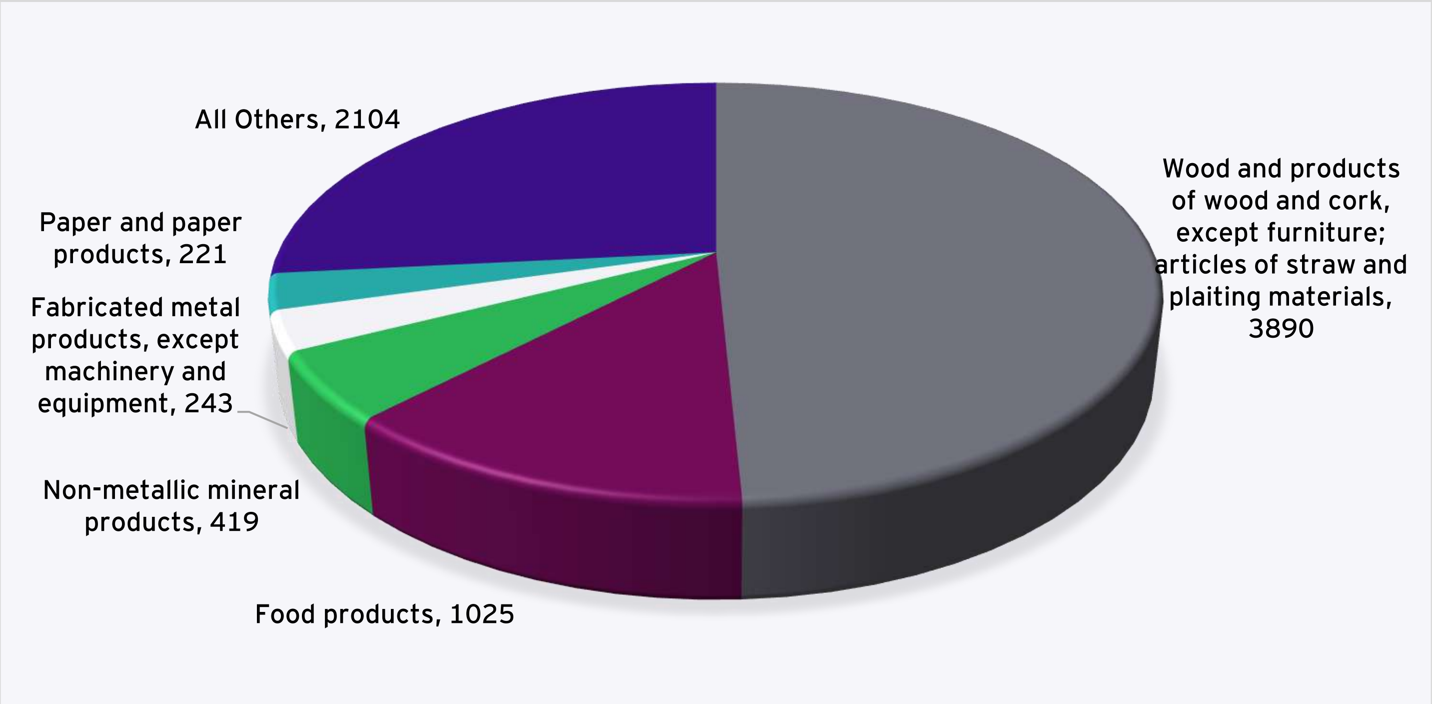


Figure 54: **[Yamunanagar]** Top 5 Sectors with maximum new employment in last 3 Financial Years (FY'17-FY'19)

Key Takeaways

- Wood products MSME sector provides the maximum employment (13752) followed by food products sector (3210) & fabricated metal products sector (2954).
- Wood products sector has created the maximum new employment in last 3 years (3890), followed by food products (1025) & non-metallic mineral products (419). Sectors such as coke & refined petroleum products, beverages, other transport equipment have experienced relatively low growth in new employment.
- Wood & wood products sector have maximum employment intensity with an average of 21.26 employees per unit, followed by tobacco products with 20 employees per unit and machinery & equipment at 19.30 employees per unit.
- Wearing apparel has the least employment intensity with only 3.09 employees per unit, followed by furniture at 3.73 employees per unit.
- Wood products sector has created the maximum employment in Yamunanagar in last three years, followed closely by the food products sector. Other sectors in top 5 in terms of employment creation are non-metallic mineral products, fabricated metal products & paper and paper products.

5. EXPORTS FROM THE DISTRICT

Key exports products from Yamunanagar include Machinery & Equipment and Fabricated metal products. Following table shows some of the exports from Yamunanagar for last 3 FYs.

(The export data in the table shows only exports related information that is available at the District Industries Centre, Yamunanagar, and actual exports figure might be significantly higher).

Table 51: Exports from Yamunanagar

S. No.	Industry	Exports (INR Lakhs)		
		FY'17	FY'18	FY'19
1	Basic Metals	2207.56	869.3	3156.98
2	Electrical equipment	4493.64	1027.14	1110.88
3	Fabricated metal products, except machinery and equipment	6373.75	5263.42	5493.69
4	Machinery and equipment n.e.c.	13992.88	23097.26	24937.93
5	Paper & Paper Products	480	979.43	604.08
6	Rubber and plastics products	2292.16	2467	2772.07

6. NATURAL RESOURCES & RAW MATERIAL AVAILABLE

Major raw material available in Yamunanagar is wood for manufacturing of plywood, paper, furniture etc.

Yamunanagar has a total forest cover of around 218 sq. km and the main flora consists of Sal, Khair, Shisham, Semul, Amaltas, Bahera etc.

Apart from these, farmers in Yamunanagar also grow Eucalyptus & Poplar trees which act as raw material for the thriving wood products & furniture industry in Yamunanagar.

Among agricultural produce, maize & rice are the chief Kharif crops whereas wheat, gram and potato are the key rabi crops. The district also has significant production of Sugarcane crop.

7. KEY INDUSTRIAL ESTATES

Yamunanagar currently has five Industrial estates. These are:

- Old Industrial Area, Yamuna Nagar
- Industrial Estate Phase-1, Yamuna Nagar
- Industrial Estate Phase-II, Yamuna Nagar
- Industrial Estate Phase-I, Manakpur
- Industrial Estate Phase-II, Manakpur

The details of HSIIDC plots in Yamunanagar are as under:

Total number of Plots	120
Allotted Plots	120
Un-allotted Plots	-
Units in Production	107
Percentage of plots allotted	100%

The details of plots in Industrial area Manakpur are as under:

Total number of Plots	522
Allotted Plots	272
Un-allotted Plots	250
Units in Production	200
Percentage of plots allotted	52.10%

8. MAJOR LARGE-SCALE UNITS

Apart from MSMEs, Yamunanagar also has quite a few Large & Mega enterprises operational in various sectors. Below table showcases number of Large & Mega enterprises in each sector along with their names.

Table 52: **[Yamunanagar]** Large & Mega Units in each Sector

S. No.	Industry	Number	Names of Large & Mega Units
1	Manufacture of Paper & Paper Products	1	• M/s Ballarpur Industries Ltd.
2	Manufacture of Food Products	2	• M/S EICL LIMITED (Formerly known as M/s Bharat Starch Industries) • M/s Saraswati Sugar Mills
3	Manufacture of Motor vehicles, trailers and semi-trailers	1	• M/s Jamuna Auto Industries Ltd.
4	Manufacture of Machinery and equipment	1	• M/s ISGEC Heavy Engineering Limited

5	Manufacture of Beverages	1	• M/s Haryana Distillery
6	Manufacture of Other Transport equipment	1	• Northern Railway Carriage & Wagon Repair Workshop
7	Manufacture of Rubber and plastics products	1	• M/s Poly Plastics
8	Manufacture of wood and products of wood	1	• M/S Trenox Laminates

9. SERVICES SECTOR SNAPSHOT

Apart from manufacturing there are several MSMEs also involved in Services sector. Below table gives snapshot of the services sector in Yamunanagar:

Table 53: **[Yamunanagar]** Services Sector Snapshot

S. No.	Industry	Total Units	Micro	Small	Medium	Total Investment (INR Lakhs)	Total employment
1	Advertising and market research	4	4	0	0	6	6
2	Architecture and engineering activities; technical testing and analysis	2	2	0	0	11	6
3	Civil Engineering	11	4	7	0	348	151
4	Computer programming, consultancy and related activities	142	136	6	0	496	373
5	Construction of building	32	27	5	0	275	170
6	Creative, arts and entertainment activities	30	27	3	0	142	90
7	Education	137	131	6	0	623	643
8	Financial service activities, except insurance and pension funding	136	125`	11	0	876	257
9	Food and beverage service activities	294	259	35	0	1934	973
10	Human health activities	90	78	12	0	564	236

11	Information service activities	42	39	3	0	266	122
12	Insurance, reinsurance and pension funding, except compulsory social security	20	10	0	0	15	18
13	Land transport and transport via pipelines	158	117	41	0	1796	563
14	Legal and accounting activities	48	15	3	0	143	116
15	Office administrative, office support and other business support activities	139	122	17	0	1004	360
16	Other financial activities	65	60	5	0	371	162
17	Other professional, scientific and technical activities	359	315	44	0	2487	988
18	Remediation activities and other waste management services	1	1	0	0	1	10
19	Security and investigation activities	16	16	0	0	32	125
20	Sports activities and amusement and recreation activities	17	12	5	0	175	70
21	Telecommunications	132	125	7	0	505	249
22	Waste collection, treatment and disposal activities; materials recovery	2	1	1	0	16	2
23	Water collection, treatment and supply	3	1	2	0	33	7

10. CLUSTERS SCENARIO

There are three clusters under the Govt. of India's Cluster Development Scheme (MSE-CDP) in Yamunanagar at various stages of implementation.

Table 54: Mini Clusters in Yamunanagar

S. No.	Cluster	Location	Cluster Identification	DSR Preparation	DPR Preparation	Implementation
1	Plywood Cluster	Yamunanagar	√	√	√	√
2	Engineering Cluster	Yamunanagar	√	√	√	√
3	Metal Utensil Cluster	Yamunanagar	√	√		

11. INDUSTRY ASSOCIATIONS

There are eight key industrial associations in Yamunanagar.

Table 55: Industry Associations in Yamunanagar

S. No	Name of the Association	Name of the President/General Secretary	Address	Contact	Email
1	Laghu Udyog Bharti, Yamuna Nagar Jagadhri Chapter	Sh. Sudhir Chandra: President Sh. Raman Saluja: General Secretary	C/O M/s Chanderpur Works Pvt. Ltd. Jorian, Yamuna Nagar	9812095635	sudhirchandra@chanderpur.com
2	The Manakpur Industrial Welfare Association-HSIIDC-Manakpur	Sh. Pawan Soni President	Plot No. 46, HSIIDC, Manakpur, District-Yamuna Nagar.	09896045527	neelsoni3131@gmail.com
3	Jagadhri Stainless Steel Manufacturer Association-Jagadhri	Sh. A.P.S. Bhatti President	C/o Bhatti Enterprises, Durga Garden- Jagadhri	09416069333	arkinderbhatti@gmail.com
4	District Yamuna Nagar Plywood Manufacturers Association	President Sh. JK Bihani	C/O M/s Manglam Plywood Industries, Khajuri Road, District Yamuna Nagar	9812004976 9896335621	jkbihani@yahoo.co.in
5	Yamuna Nagar-Jagadhri Chamber of Commerce and Industry	Sh. Atul Gupta: President	C/O M/s Polyplastic Uttar Bharat Limited, Industrial Area Yamuna Nagar.	9355538016 9215551754	samirasaluja@oewin.com
6	Industrial Estate	Sh. G.S Chawla	Plot No. 46, Industrial	9812003418	jaicoagro@gma

	Association, Yamuna Nagar.	President	Estate, Yamuna Nagar		il.com
7	Haryana Chamber of Commerce & Industry	Sh. Raj Chawla President	C/O M/s J.K. Metal Industry, Jagadhari Road, District Yamuna Nagar.	9355339530	bharat@jkmetal.com
8	Jagadhari Metal Manufacturers and Suppliers Association	Sh. Raj Saluja President	C/O Jagadhari Manufacturing and Suppliers Association-Jagadhari.	9812086073	- parth.saluja@gmail.com

12. KEY ISSUES OF THE INDUSTRIES

Following are some of the key issues raised by the industry in Yamunanagar:

- Bad condition of roads in Industrial Estate Phase I&II and HSIIDC Manakpur.
- Upgradation of Quality Marking Centre in Yamunanagar required.
- Requirement of business centers to facilitate the industrialists in showcasing their products & catalogues.
- Request to allot more lands such as vacant Panchayat lands/ government lands to set-up new industries in the district.
- Assistance desired from state govt. in making MSMEs competent to use e-commerce for marketing/ material purchasing.

13. POTENTIAL AREAS OF INTERVENTION

- Industries Department can set-up a half-yearly grievance redressal meeting between HSIIDC, PWD & Industry association to address the Road condition issues of the Industry.
- Already proposed upgradation of QMC Jagadhari may be expedited.
- Proposal for a common display centre in Yamunanagar, especially for Plywood & Metal products Industry may be initiated.
- Proposal for giving vacant gram panchayat lands on lease to the Industry may be finalized & implemented.
- DIC Yamunanagar may plan training workshops for MSMEs in the district to make

them well-versed with concepts of e-procurement, e-commerce sales, digital marketing etc.

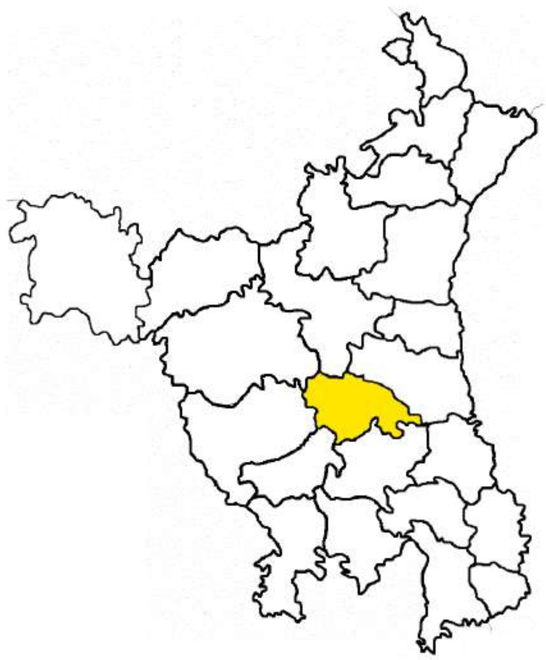
14. POTENTIAL AREAS OF INVESTMENT

- Yamunanagar is a key hub for plywood industry, and accordingly as many as 647 MSME units are involved in the manufacturing of products of wood & cork. Sector has seen 209 new units opening up in the last 3 years and has a total investment of INR 492 Cr. with an attractive CAGR of 18.98% in last 3 financial years. There is a significant scope for investment in supply chain services for these units such as transportation & warehousing, design services for product diversification, & downstream marketing services such as retailers/ distributors who source their products from Yamunanagar. Given the high number of units, there is opportunity for wood related advanced technology suppliers to set up their branches in Yamunanagar.

- Another key sector in Yamunanagar is 'Fabricated Metal Products'. Jagadhari is famous for being a metal utensils hub of North India. The sector has 221 MSME units currently operating in Yamunanagar with a total investment of INR 492.05 Cr with new investment of INR 199.91 Cr in last three financial years. There is an attractive opportunity for branded retailing of products sourced from Jagadhari across India, and large-scale organized metal based raw materials supply to these units.

07. Rohtak

District Profile



EXECUTIVE SUMMARY

District Profile

MSME Scenario

07

Rohtak

Famous for....

"Fasteners Industry"

1 MSMEs in Rohtak

Total number of MSME units	2,322
New MSME units (last 3 years)	1,319

- Wearing Apparel
- Fabricated Metal Products
- Food Products
- Motor vehicles, trailers & semi-trailers
- Wood & products of wood

Top 5 sectors – Maximum number of MSMEs

2 Investment Scenario in Rohtak

Total Investment (INR Lakhs)	87,878
New Investment (last 3 years; INR Lakhs)	20,479

- Fabricated Metal Products
- Motor-vehicles, trailers & semi-trailers
- Basic Metals
- Food Products
- Chemicals & Chemical Products

Top 5 sectors – Maximum investment by MSMEs

3 Employment Scenario in Rohtak

Total Employment	23,076
New Employment (last 3 years)	5,150

- Fabricated Metal Products
- Motor Vehicles, trailers & semi-trailers
- Food Products
- Basic Metals
- Wood & Products of wood

Top 5 sectors – Most employment generated

4 Potential for MSMEs

- Investment opportunity towards facilities producing raw material supplies such as iron & steel for Fasteners units, & common display center, marketing support for MSMEs
- Wearing Apparel sector in Rohtak can be further developed via investment towards common design centers and retailing & marketing support

5 Others

Total Exports (FY 18-19; INR Lakhs)	33,173
Number of Large & Mega units	30
Existing Clusters	1 Mini Cluster

1. INTRODUCTION

Rohtak is one of the oldest districts of Haryana state and earlier the district included present areas of Rohtak, Sonipat & Jhajjar. In 1973, parts of the district were carved out to form the present Sonipat district and in 1997 the district was further bifurcated to form the new districts of Jhajjar & Rohtak. The district lies on the Malout - Askot national highway 9 which connects it to the neighboring states of Punjab, Haryana, Delhi, Uttar Pradesh & Uttarakhand. Rohtak is primarily known for its fasteners Industry which is the prime export item of the district.

1.1 Geography

Rohtak lies towards the center of the Haryana state, and is surrounded by Jind & Sonipat on the north, Sonipat in the east, Jhajjar on the south and Bhiwani & Charkhi Dadri in & west. Topography of the district is largely alluvial plains.

Climate of the Rohtak can described as hot & dry summers & cold winters. The district receives rainfall primarily in the monsoon season which accounts for more than 70% of the total annual rainfall. Sahibi is the key river passing through the district, however the district is also served via the western Yamuna canals. Soil found in the district is mostly sandy loam and silty clay loam.

1.2 Demographic Profile

As per the census of 2011, total population of Rohtak is 10,61,204 with a population density of 608 people per sq. KM. Rural to urban percentage distribution is 57.96% & 42.04% respectively. Rohtak has an average literacy rate of 80.22% with male literacy rate of 87.65% and female literacy rate of 71.72%. The district has a lower female to male ratio at 867 females per thousand males, compared to the state average of 877 and significantly lower than the national average of 940.

1.3 Administrative Set-up

Rohtak has a total land area of 1745 Sq. Km. The district has 4 Tehsils (Rohtak, Meham, Sampla, Kalanaur) and 1 Sub-tehsil (Lakhan Majra), 3 sub-divisions, 5 development blocks, 139 Panchayats and around 147 villages.

The following table shows categorization of blocks as per the status of industrial development.

Table 56: **[Rohtak]** Categorization of Blocks

Block A	Block B	Block C	Block D
	Rohtak and IMT, Rohtak	Meham	
		Kalanaur	
		Lakhan Majra	
		Sampla	

2. SECTOR WISE MSME LANDSCAPE

Following table shows the total number of MSME units in each sector, in Rohtak, along with the bifurcation of number of micro, small and medium enterprises.

The table also shows number of new units that started their commercial production in the last three financial years.

Table 57: **[Rohtak]** No. of MSME Units in each Sector

S. No	Industry	Total Units	Micro	Small	Medium	New Units (Last 3 Years)
Food, Beverages & Tobacco						
1	Food products	120	98	20	2	57
2	Beverages	8	3	5	0	5
3	Tobacco	2	0	2	0	0
Textiles & Apparel						
4	Textiles	48	43	5	0	23
5	Wearing apparel	733	726	7	0	691
Leather, Wood & paper						
6	Leather and related products	11	11	0	0	6
7	Wood and products of wood and cork, except furniture; articles of straw and plaiting materials	86	59	27	0	18
8	Paper and paper products	29	24	5	0	11
9	Furniture	36	29	7	0	17
Pharma, Petro-Chemicals, Rubber products						
10	Pharmaceuticals, medicinal chemical and botanical products	15	10	4	1	9

11	Chemicals and chemical products	64	44	19	1	29
12	Coke & Refined Petroleum Products	12	3	9	0	8
13	Rubber and plastics products	32	21	8	3	11
Metals & Mineral Products						
14	Basic metals	73	40	31	2	23
15	Fabricated metal products, except machinery and equipment	558	385	161	12	210
16	Non-metallic mineral products	33	25	8	0	19
Electrical, Electronics & Machinery						
17	Computer, electronic and optical products	11	10	0	1	7
18	Electrical equipment	22	14	8	0	13
19	Machinery and equipment	67	50	16	1	25
Automotive & Auto-Components						
20	Motor vehicles, trailers and semi-trailers	111	67	40	4	35
21	Other Transport Equipment	45	33	12	0	18
Other Manufacturing						
22	Other manufacturing	206	147	52	7	84

Following scatter diagram shows the comparison between total units in each sector vis-a-vis new units opened in the last 3 financial years.

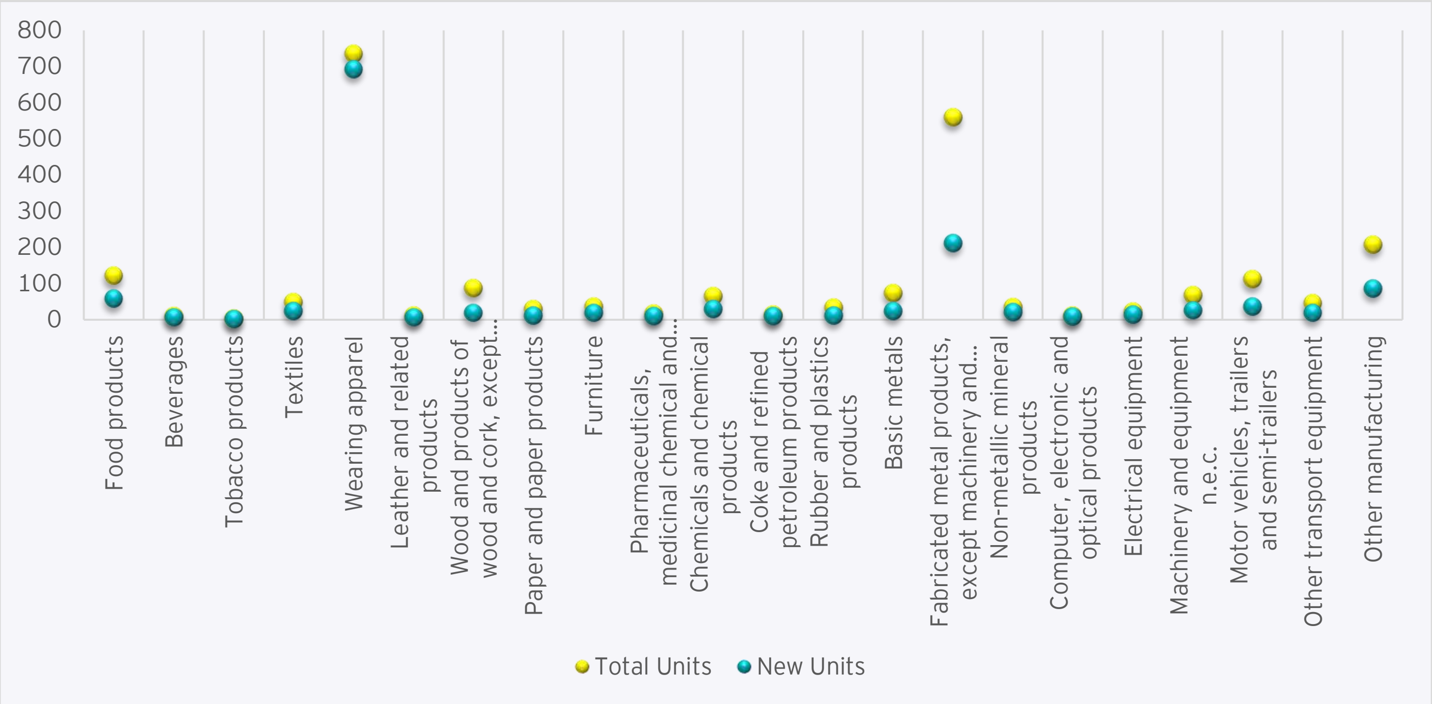


Figure 55: **[Rohtak]** Total Units & New Units in each Sector

2.1 Top 10 Sectors: Based on Number of Units

Following table shows top ten sectors in Rohtak, based upon the total number of MSME units in the district.

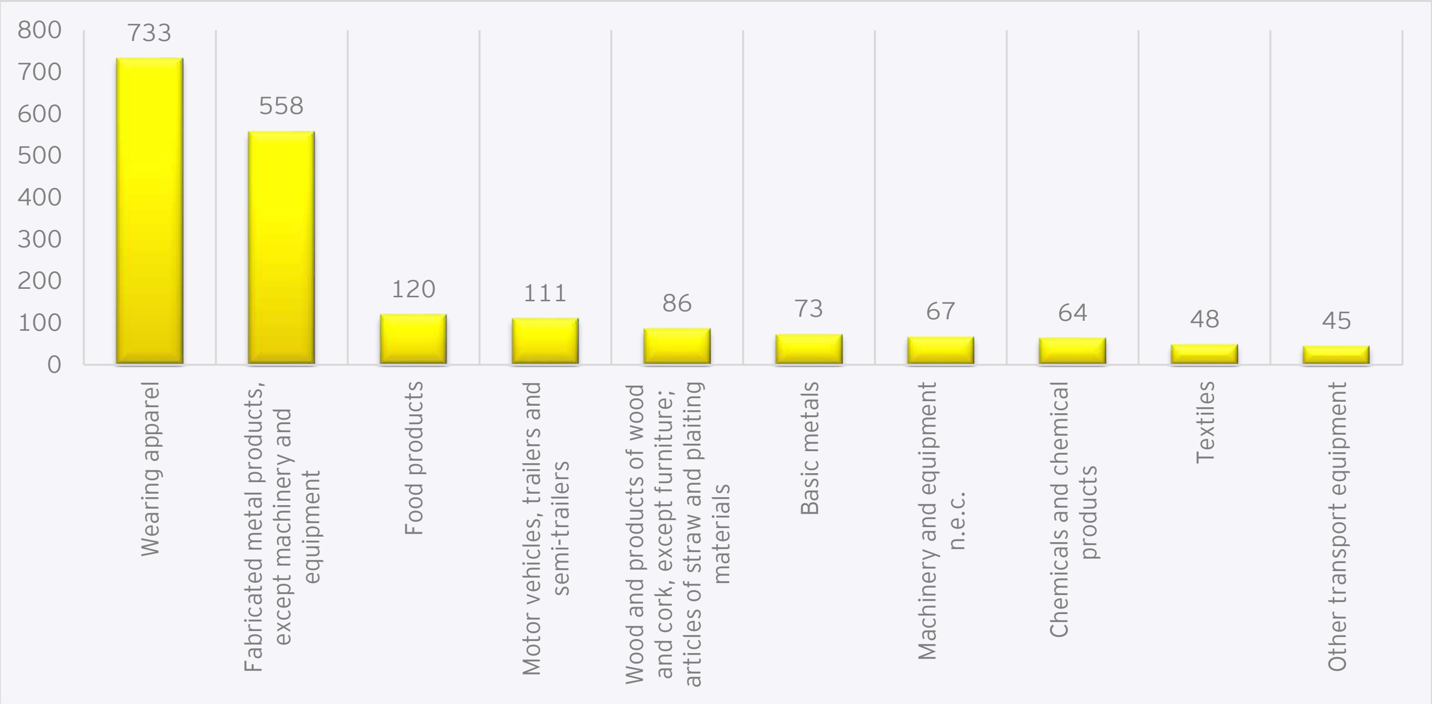


Figure 56: **[Rohtak]** Top 10 sectors - Total No. of MSME Units

2.2 Top 10 Sectors: Based on New Units in Last 3 Years

Following table shows the top ten sectors in Rohtak, based upon number of new MSME units set-up in the last three years.

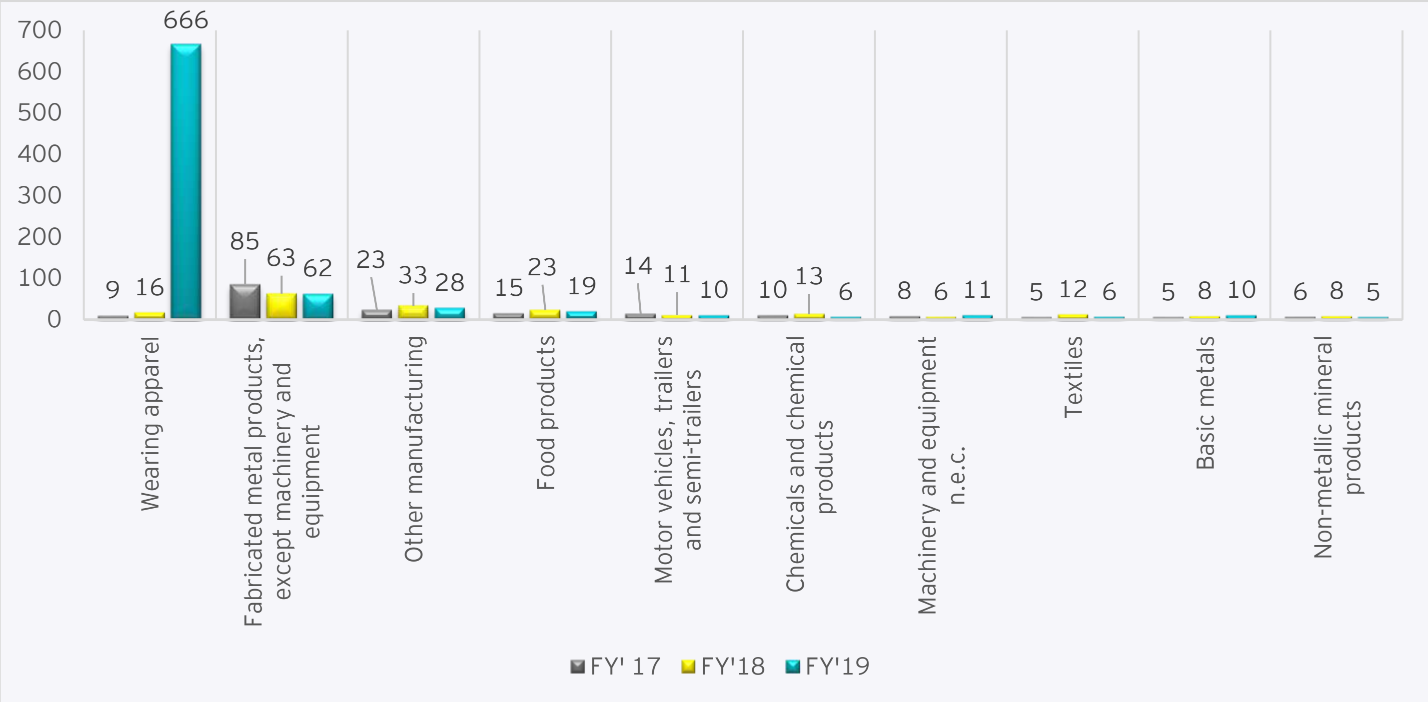


Figure 57: **[Rohtak]** Top 10 Sectors - New Units in Last 3 Years

Key Takeaways

- Maximum no. of MSME units in Rohtak are involved in wearing apparel (733), fabricated metal (558), followed by food products (120).
- Apart from wearing apparel, fabricated metal & food products; motor vehicles & wood products have significant number of MSMEs operating out of Rohtak.
- In last three years also, wearing apparel sector has seen maximum number of new MSME units opened (691), followed by fabricated metal (210) & food products (57).
- In terms of percentage growth, wearing apparel has experienced impressive recent growth with 94.27% of the total units having opened up in the last 3 years, followed by coke & refined petroleum products 66.66%.

3. SECTOR WISE INVESTMENT SCENARIO

Punjab National Bank is the convener bank of State Level Bankers' Committee (SLBC) in Haryana and also the district lead bank of Rohtak.

Following table shows the total investment by MSMEs in each sector in Rohtak, along with new investment in the last three financial years (figures are in Lakhs).

Table 58: **[Rohtak]** Total Investment by MSMEs

S. No	Industry	Investment (INR Lakhs)				
		Total Investment	FY'17	FY'18	FY'19	New Investment (Last 3 Years)
Food, Beverages & Tobacco						
1	Food products	4725	1079	226	192	1497
2	Beverages	1228	750	20	32	802
3	Tobacco	800	0	0	0	0
Textiles & Apparel						
4	Textiles	637	192	74	31	297
5	Wearing apparel	1811	61	85	800	946
Leather, Wood & paper						
6	Leather and related products	63	0	8	36	44
7	Wood and products of wood and cork, except furniture; articles of straw and plaiting materials	3746	555	460	860	1875
8	Paper and paper products	794	45	132	25	202
9	Furniture	712	91	28	74	193
Pharma, Petro-Chemicals, Rubber products						
10	Pharmaceuticals, medicinal chemical and botanical products	1505	81	5	103	189
11	Chemicals and chemical products	4012	263	766	977	2006
12	Coke & Refined Petroleum Products	689	150	368	45	563
13	Rubber and plastics products	3029	175	38	75	288

Metals & Mineral Products						
14	Basic metals	5801	268	397	1117	1782
15	Fabricated metal products, except machinery and equipment	30006	2343	1026	1412	4781
16	Non-metallic mineral products	1167	74	238	253	565
Electrical, Electronics & Machinery						
17	Computer, electronic and optical products	1079	1	40	28	69
18	Electrical equipment	1152	49	91	72	212
19	Machinery and equipment	3118	89	79	332	500
Automotive & Auto-Components						
20	Motor vehicles, trailers and semi-trailers	8756	187	258	401	846
21	Other Transport Equipment	1063	62	42	73	177
Other Manufacturing						
22	Other manufacturing	11985	396	723	1526	2645

Following scatter diagram shows a comparison of total MSME investment and new investment in the last 3 financial years, across different sectors of Rohtak (except for fabricated metal sector which is an outlier with high investments).

Figure 58: **[Rohtak]** Total Investment & New Investment in Last 3 Financial Years (FY'17-FY'19)

Following pie-chart showcases the sectors that have attracted maximum investments in the last 3 financial years (figures are in Lakhs).

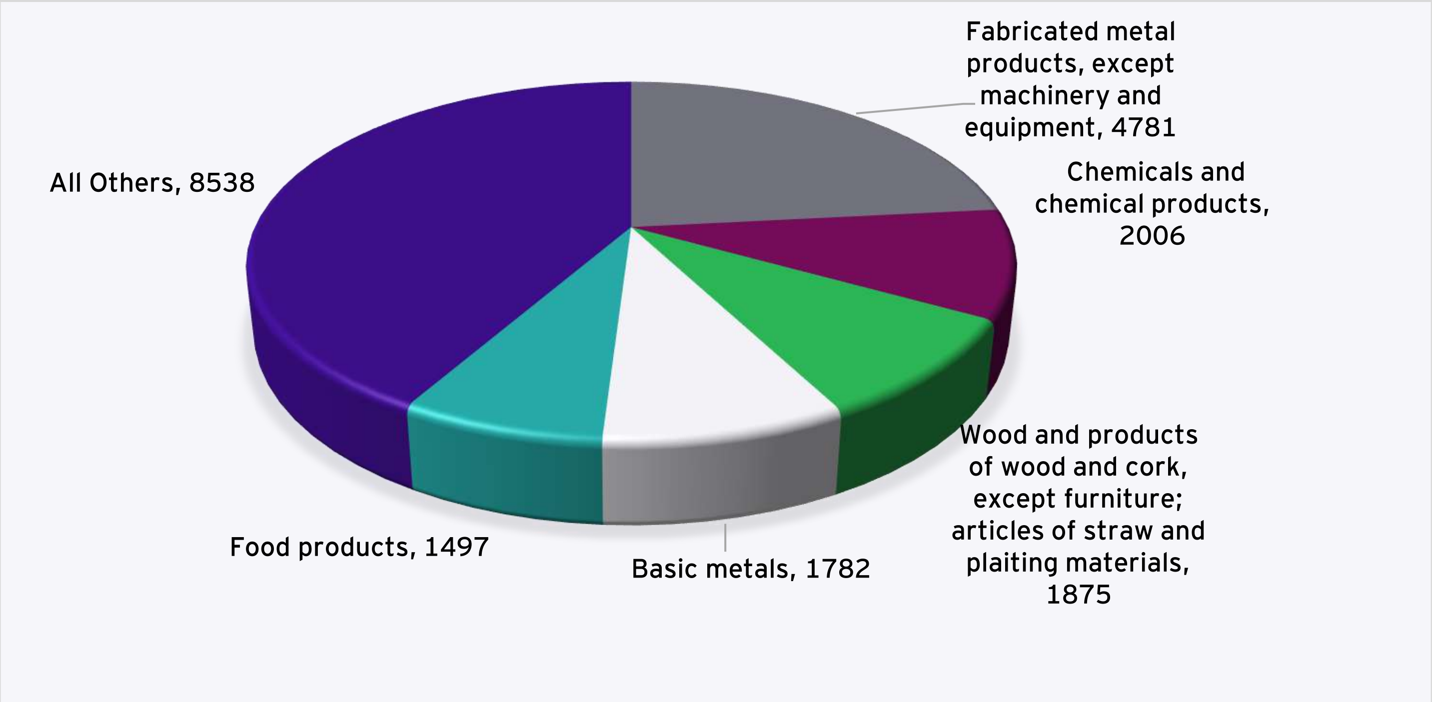


Figure 59: **[Rohtak]** Top 5 Sectors with maximum investment in last 3 Financial Years (FY'17-FY'19)

Following diagram shows a comparison of compound annual growth rate of various sectors for last three financial years.

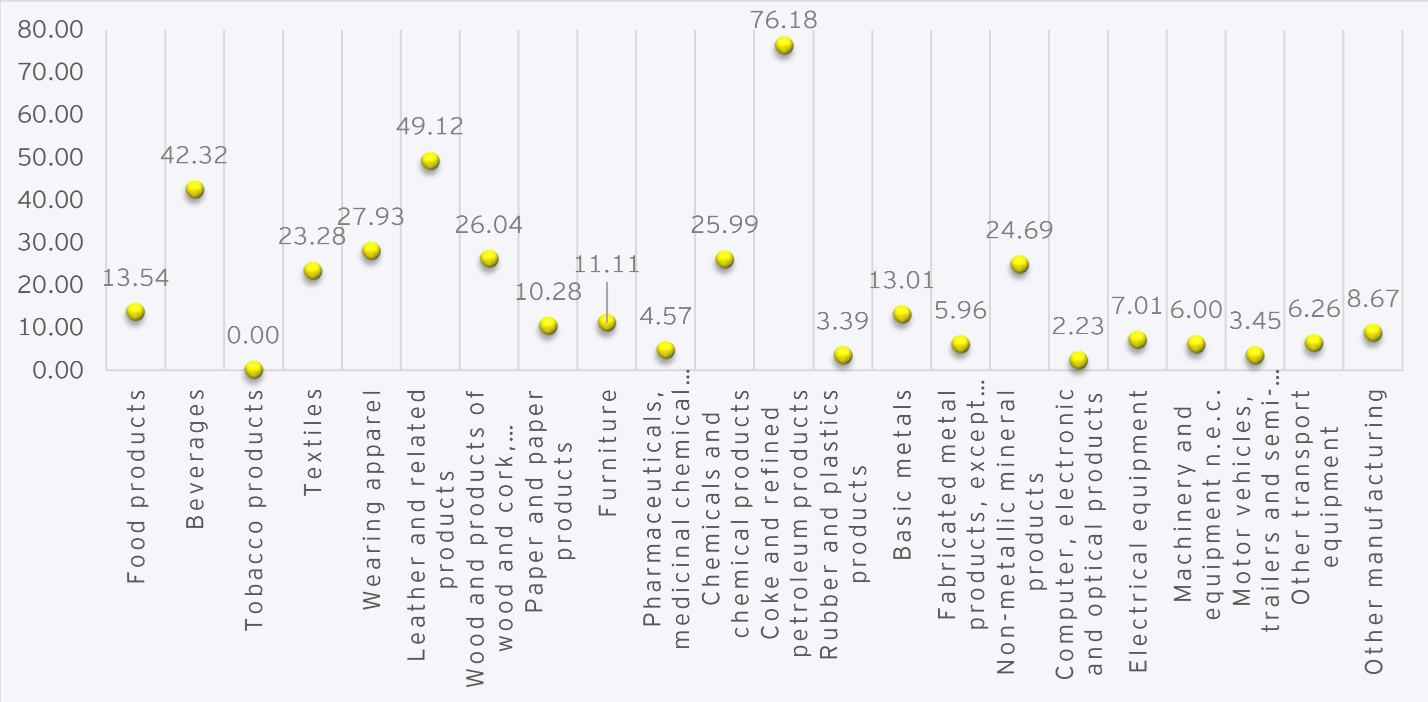


Figure 60: **[Rohtak]** CAGR for Last 3 Financial Years (FY'17-FY'19)

Key Takeaways

- Highest amount of investment by MSMEs in Rohtak has been in fabricated metal sector (INR 300.06) Cr, followed by motor vehicles sector (INR 87.56 Cr).
- Fabricated metal sector apart from having the highest total investment (INR 300.06 Cr), has also seen maximum investment in last three financial years (INR 47.81 Cr) followed by the chemicals & chemical products sector (INR 20.06 Cr).
- As evident apart from fabricated metal & chemicals, wood products, basic metals and food products have attracted the maximum investments in last three financial years.
- Sectors with high CAGR in MSME investments in last 3 FYS are: coke & refined petroleum products (76.18%), leather & related products (49.12%), beverages (42.32%), wearing apparel (27.93%) & wood products (26.04%).

4. SECTOR WISE EMPLOYMENT SCENARIO

Below table showcases the total employment created by MSMEs in each of the sectors, along with new employment created in the last three financial years.

Table 59: **[Rohtak]** Total Employment in each Sector

S. No.	Industry	Total Employment	FY'17	FY'18	FY'19	New Employment (Last 3 Years)
Food, Beverages & Tobacco						
1	Food products	1897	138	108	80	326
2	Beverages	91	43	4	7	54
3	Tobacco	65	0	0	0	0
Textiles & Apparel						
4	Textiles	292	80	61	12	153
5	Wearing apparel	1059	40	62	713	815
Leather, Wood & paper						
6	Leather and related products	55	0	10	16	26
7	Wood and products of wood and cork, except furniture; articles of straw and plaiting materials	1218	62	155	82	299
8	Paper and paper products	229	15	47	9	71
9	Furniture	331	43	21	38	102
Pharma, Petro-Chemicals, Rubber products						
10	Pharmaceuticals, medicinal chemical and botanical products	193	38	5	29	72
11	Chemicals and chemical products	723	67	79	59	205
12	Coke & Refined Petroleum Products	124	24	68	12	104
13	Rubber and plastics products	1032	29	30	12	71
Metals & Mineral Products						
14	Basic metals	1462	30	48	109	187
15	Fabricated metal products, except	7304	626	358	332	1316

	machinery and equipment					
16	Non-metallic mineral products	458	52	84	86	222
Electrical, Electronics & Machinery						
17	Computer, electronic and optical products	652	2	12	13	27
18	Electrical equipment	422	21	32	13	66
19	Machinery and equipment	803	36	31	55	122
Automotive & Auto-Components						
20	Motor vehicles, trailers and semi-trailers	2098	73	71	102	246
21	Other Transport Equipment	279	34	18	32	84
Other Manufacturing						
22	Other manufacturing	2289	165	166	251	582

Following scatter diagram shows a comparison of total employment across different MSME sectors and new employment generated in the last 3 financial years (except for fabricated metal sector with total employment of '7304' and new employment of '1316', which being an outlier cannot be represented with other sectors).

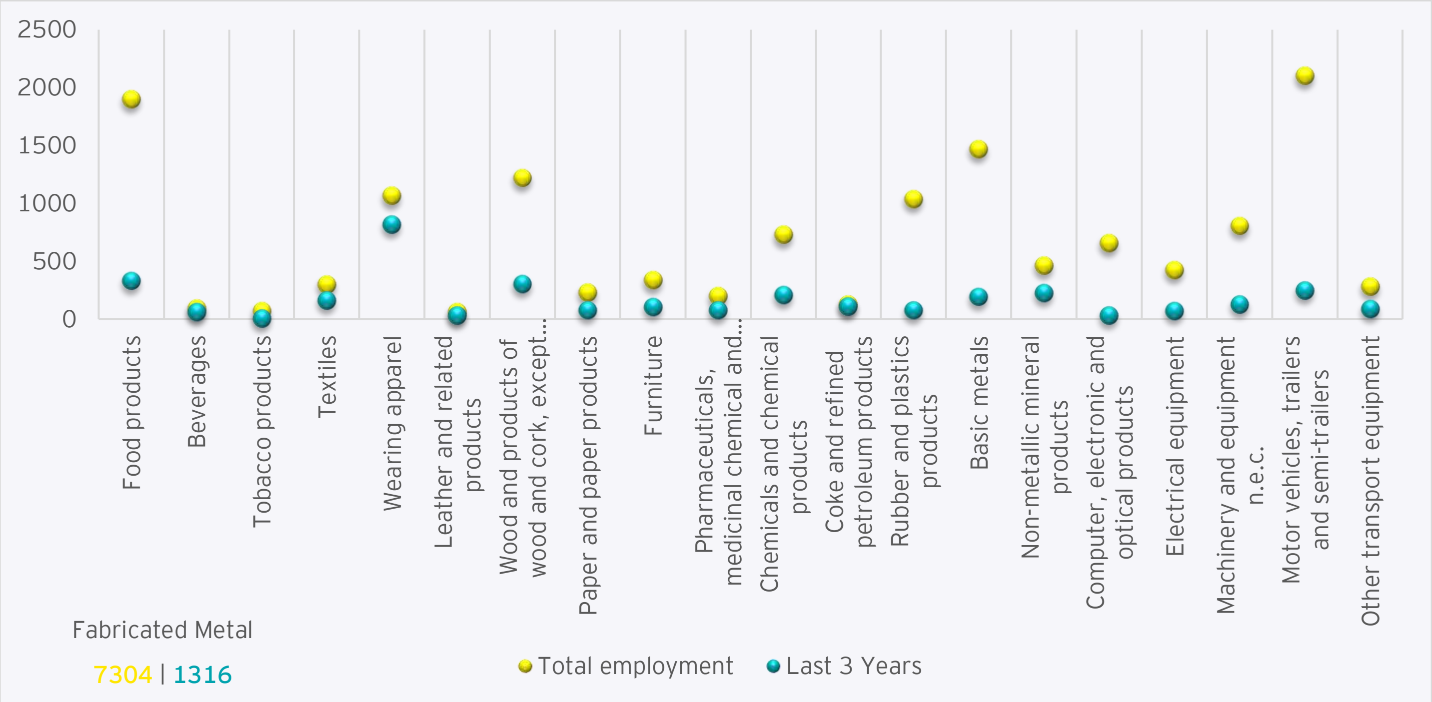


Figure 61: **[Rohtak]** Total Employment & New employment in last 3 Financial Years (FY'17-FY'19)

Following pie-charts showcase the sectors that have created maximum employment in each of the last 3 financial years.

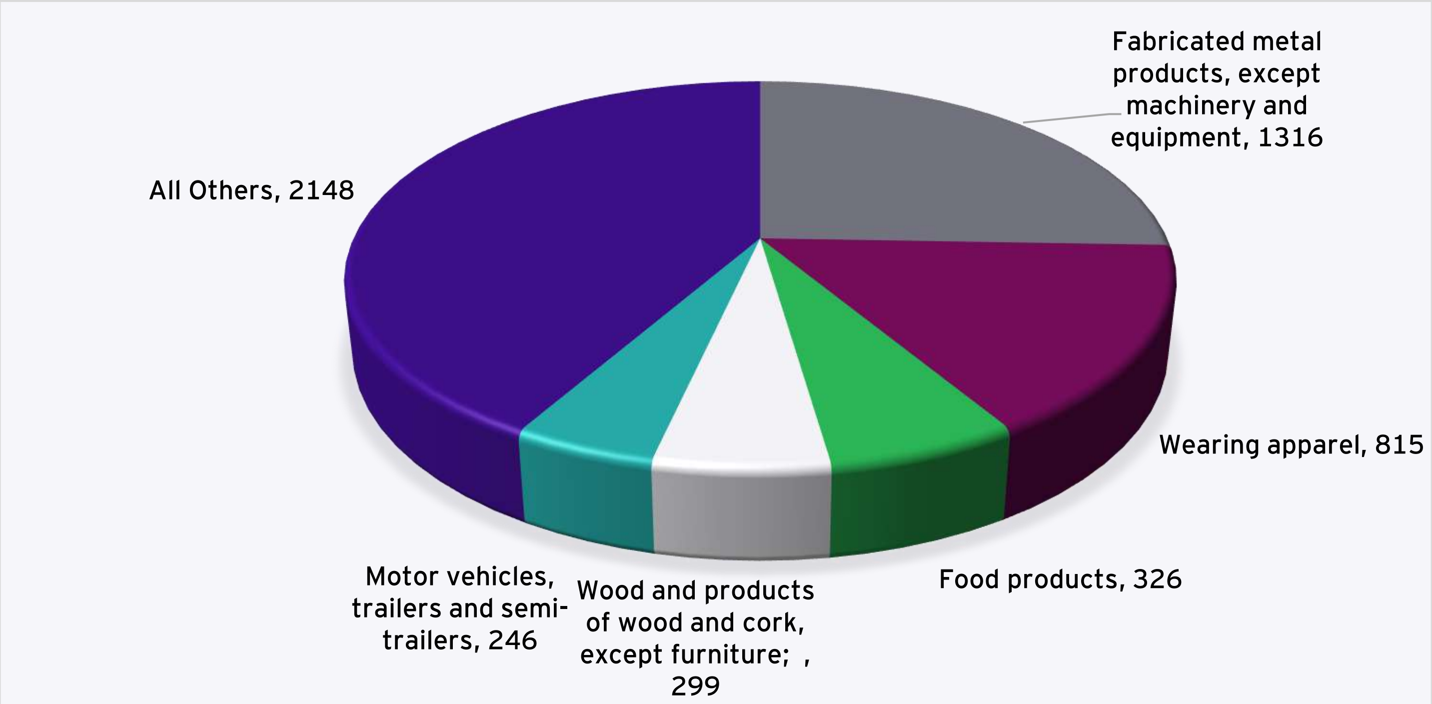


Figure 62: **[Rohtak]** Top 5 Sectors with maximum new employment in last 3 Financial Years (FY'17-FY'19)

Following bar chart showcases category wise per unit employment analysis for MSMEs in Rohtak.

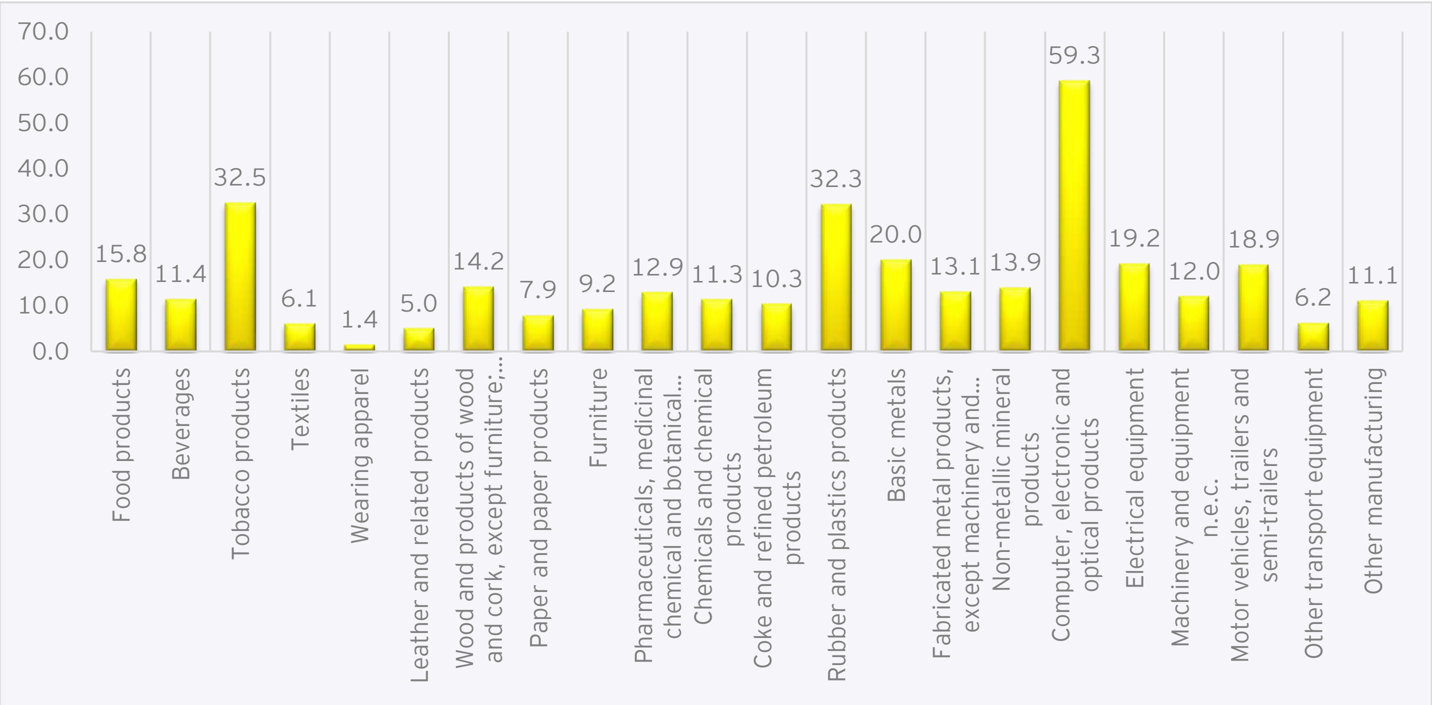


Figure 63: **[Rohtak]** Category wise employment intensity

Key Takeaways

- Fabricated metal MSME sector provides the maximum employment (7,304) followed by motor vehicles sector (2,098) & food products sector (1,897).
- Apart from fabricated metal & wearing apparel, food products, wood products & motor vehicles have created the maximum employment in last 3 financial years.
- Sectors such as leather products, computer, electronic & optical products & beverages have experienced relatively low growth in new employment.
- Computer, electronic & optical products have maximum employment intensity with an average of 59.3 employees per unit, followed by tobacco products with 32.5 employees per unit and rubber products at 32.3 employees per unit.
- Wearing apparel has the least employment intensity with only 1.4 employees per unit, followed by leather products at 5.0 employees per unit.

5. EXPORTS FROM THE DISTRICT

Key exports products from Rohtak include Fasteners with INR 241.71 Cr worth of exports in FY'19. Following table shows some of the exports from Rohtak for last 3 FYs.

(The export data in the table shows only exports related information that is available at the District Industries Centre, Rohtak, and actual exports figure might be significantly higher).

Table 60: Exports from Rohtak

S. No.	Industry	Exports (INR Lakhs)		
		FY'17	FY'18	FY'19
1	Fasteners	16948.48	19905.1	24171.36
2	Pesticides, Insecticides, Weedicides, Fungicides & Intermediates etc.	5843.86	3759.25	5001.47
3	Tools and Dies	264.32	336.59	431.09
4	Auto Parts	1200.81	1157.4	1442.11
5	Stainless Steel Wires	202.53	297.55	526.56
6	Article of Iron and Steel	334.22	214.35	348.15
7	Food Products	0	932.499	1252.7

6. NATURAL RESOURCES & RAW MATERIAL AVAILABLE

Raw materials available in Rohtak include minor minerals such as ordinary clay/ brick earth etc.

Key agricultural produce available in the district includes Rice, wheat, maize, barley and pulses such as beans, grams, chickpeas & Tur.

District also has some area under commercial crops cultivation such as Sugarcane & Cotton and some production of oilseeds such as Rapeseed, Mustard & Sesamum

Rohtak has a total forest cover of around 53 sq. km which makes around 3% of the total geographical area.

7. KEY INDUSTRIAL ESTATES

Rohtak currently has five industrial areas as follows:

- Ch. Ranbir Singh IMT, Rohtak
- IDC Rohtak
- HSIIDC Kutana, Rohtak
- Sampla Beri Road Industrial Area
- Jind Road Industrial Area

Plot Details of HSIIDC plots are as under:

HSIIDC Kutana, Rohtak:

Total number of Plots	270
Allotted Plots	220
Un-allotted Plots	50
Units in Production	111
Percentage of plots allotted	81.48%

IMT Rohtak

Total number of Plots	511
Allotted Plots	60
Un-allotted Plots	451
Units in Production	20
Percentage of plots allotted	11.74%

8. MAJOR LARGE-SCALE UNITS

Apart from MSMEs Rohtak also has some large & mega enterprises as of now. Below table showcases number of Large & Mega enterprises in each sector along with their names.

Table 61: **[Rohtak]** Large & Mega Units in each Sector

S. No.	Industry	Number	Names of Large & Mega Units
1	Chemical & Chemical Products	2	• M/s Asian Paints Ltd. • M/s Bharat Rasayan Ltd
2	Fabricated Metal Products	8	• M/s Panchratna Fasteners. • M/s Universal Precision Screws. • M/s Bhagwan Precision Pvt Ltd. • M/s Aisin Automotive Haryana Pvt Ltd. • M/s Shivam Autotech Ltd. • M/s Advics North India Pvt Ltd. • M/s A K Automotive. • M/s Micro Turners
3	Food Products	7	• M/s Haryana Sugar Coop. Mill Ltd., Bhalianandpur (Rohtak). • M/s Rohtak Cooperative Milk Producer Union Ltd, Milk Plant Gohana Road, Rohtak • M/s The Meham Co-operative Sugar Mill Ltd., Meham District, Rohtak • M/s Swasth Aahar Rohtak. • M/s Sabarkantha District Co-operative Milk Producer's Union Ltd., Plot No. 1,2 & 3, Sector-30-A, IMT, Rohtak. • M/s Lotte India Corporation Ltd. • M/s Enrich Agro Food Products Pvt Ltd.
4	Motor-Vehicles, Trailers & Semi-Trailers	9	• M/s Panchratna Fasteners. • M/s Universal Precision Screws. • M/s Bhagwan Precision Pvt Ltd. • M/s Aisin Automotive Haryana Pvt Ltd. • M/s Shivam Autotech Ltd. • M/s Advics North India Pvt Ltd. • M/s A K Automotive • M/s Micro Turners • M/s Tightwell Fasteners
5	Paper & Paper Products	1	• M/s Ujala Publications
6	Rubber & Plastic Products	3	• M/s Hi-Tech Plast Ltd. • M/s Sai Baba Polymer Technology Pvt. Ltd. • M/s Grow Max India Pvt Ltd.

9. SERVICES SECTOR SNAPSHOT

Rohtak has significant number of MSMEs operating in the services sector also.

Below table gives a snapshot of the services sector in Rohtak:

Table 62: **[Rohtak]** Services Sector Snapshot

S. No.	Industry	Total Units	Micro	Small	Medium	Total Investment (INR Lakhs)	Total employment
1	Accommodation	10	7	3	0	146	54
2	Activities of head offices; management consultancy activities	9	9	0	0	20	159
3	Activities of membership organizations	1	1	0	0	1	1
4	Advertising and market research	20	15	5	0	191	98
5	Air Transport	2	1	1	0	95	21
6	Architecture and engineering activities; technical testing and analysis	22	17	4	1	685	205
7	Broadcasting and programming activities	1	1	0	0	1	1
8	Civil Engineering	9	5	4	0	200	83
9	Computer programming, consultancy and related activities	37	34	3	0	184	150
10	Construction of building	10	9	1	0	46	42
11	Creative, arts and entertainment activities	6	6	0	0	15	19
12	Crop and animal production, hunting and related service activities	8	7	1	0	137	29
13	Education	86	79	7	0	608	514
14	Electricity, gas, steam and air conditioning supply	8	5	3	0	155	44
15	Employment activities	28	25	3	0	114	624
16	Financial service activities, except insurance and pension funding	28	24	4	0	141	107
17	Food and beverage service activities	95	79	15	1	1187	403
18	Gambling and betting activities	2	2	0	0	2	6

19	Human health activities	62	47	14	1	1134	439
20	Information service activities	25	24	1	0	156	86
21	Insurance, reinsurance and pension funding, except compulsory social security	3	3	0	0	3	10
22	Land transport and transport via pipelines	85	21	59	5	6058	505
23	Legal and accounting activities	29	29	0	0	57	89
24	Libraries, archives, museums and other cultural activities	6	6	0	0	25	20
25	Mining of metal ores	2	2	0	0	11	6
26	Motion picture, video and television programme production, sound recording and music publishing activities	9	8	1	0	30	49
27	Office administrative, office support and other business support activities	49	39	10	0	501	196
28	Other financial activities	23	23	0	0	72	88
29	Other mining and quarrying	3	3	0	0	7	6
30	Other personal service activities	102	88	13	1	1206	256
31	Other professional, scientific and technical activities	104	88	15	1	1267	1280
32	Postal and courier activities	88	88	0	0	91	91
33	Printing and reproduction of recorded media	2	2	0	0	3	6
34	Public administration and defence; compulsory social security	5	5	0	0	24	17
35	Publishing activities	8	8	0	0	35	42
36	Real estate activities	10	9	1	0	40	64
37	Rental and leasing activities	39	33	5	1	682	93
38	Repair and installation of machinery and equipment	22	18	4	0	160	84
39	Repair of computers and personal and household goods	55	48	7	0	303	187
40	Residential care activities	2	2	0	0	15	5
41	Retail trade, except of motor vehicles and	36	35	1	0	123	106

	motorcycles						
42	Scientific research and development	1	0	1	0	45	3
43	Security and investigation activities	18	16	2	0	164	1349
44	Services to buildings and landscape activities	29	20	9	0	472	187
45	Sewerage	1	1	0	0	10	8
46	Social work activities without accommodation	11	9	2	0	68	50
47	Specialized construction activities	12	9	2	1	322	84
48	Sports activities and amusement and recreation activities	11	9	2	0	82	50
49	Telecommunications	61	60	1	0	255	137
50	Travel agency, tour operator and other reservation service activities	35	32	3	0	262	138
51	Undifferentiated goods and services- productive activities of private households for own use	1	1	0	0	3	2
52	Veterinary activities	4	2	2	0	122	73
53	Warehousing and support activities for transportation	22	12	9	1	678	86
54	Waste collection, treatment and disposal activities; materials recovery	5	5	0	0	12	19
55	Water collection, treatment and supply	1	1	0	0	8	3
56	Water transport	2	1	1	0	55	10
57	Wholesale and retail trade and repair of motor vehicles and motorcycles	16	14	2	0	103	57
58	Wholesale trade, except of motor vehicles and motorcycles	32	25	7	0	368	80

10. CLUSTERS SCENARIO

Rohtak currently has only 1 cluster under the State Mini-cluster Development scheme of Haryana and the details are as under.

Table 63: Mini Clusters in Rohtak

S. No.	Mini Clusters	Location	Cluster Identification	DSR Preparation	DPR Preparation	Implementation
1	Fasteners Cluster	Rohtak	√	√	√	√

The cluster is currently at Machinery Procurement stage and a grant of INR 81.73 Lakhs has already been released to the cluster for the setting up of advanced machining and testing facility.

11. INDUSTRY ASSOCIATIONS

Following is the list of Industry Associations in Rohtak:

Table 64: Industry Associations in Rohtak

S. No.	Name of Association	Name of Presidents/ Chairman	Contact	E-mail
1	Rohtak IDC Industries Association	Sh. S K Khator, President	9215549575	shrikishankhator@gmail.com
2	Rohtak Metal Finishers Association	Mr Bitto Malhotra, President	9896673001	
3	Laghu Udyog Bharti,	Mr Angad Kochar	9215777773	
4	Rohtak District Industries Association	Mr Ashok Choudhary	9896089797	ashokkumar1355@gmail.com
5	Small Scale Industries Association	Mr K L Chawla	9215550821	ssiassoc@gmail.com
6	Jind Road Industries Welfare Society	Mr Suresh Seth	9812021074	hanumatwire@gmail.com

7	Sampla Beri Road Industrial Welfare Society	Mr Yashpal Garg	9811010020	gargwiremanufacturing@gmail.com

12. KEY ISSUES OF THE INDUSTRIES

MSMEs in Rohtak have raised following issues which they are currently facing:

- Rohtak IDC Industries Association has raised the issue of Trade License tax being collected by municipal corporation, whereas maintenance of the area is looked after by HSIIDC with no role of municipal corporation.
- Small & micro units operating in unapproved area adjoining the Industrial area have requested for the area to be approved as more than 80% of this area is occupied by MSMEs.
- High per unit rate of electricity compared to nearby states is a pressing issue for Rohtak MSMEs.
- HSIIDC and UHBVN have different norms for factory license clearance resulting in Industrialists having to prepare two building plans to get clearances from each department.
- No proper maintenance of HSIIDC Industrial area in last 2-3 years.
- Need for a dispensary in HSIIDC Kutana & IDC Rohtak.
- Need for alternative sites for Industries operating in non-conforming zones.
- Demand for Information seminars for MSMEs on State & Central Govt., schemes and concepts such as Digital Marketing, QMS, ZED etc.
- MSMEs facing issues in getting timely payment from anchor units as per the payment terms.
- Demand for sewage treatment plant & adequate drinking water supply for Industrial areas.

13. POTENTIAL AREAS OF INTERVENTION

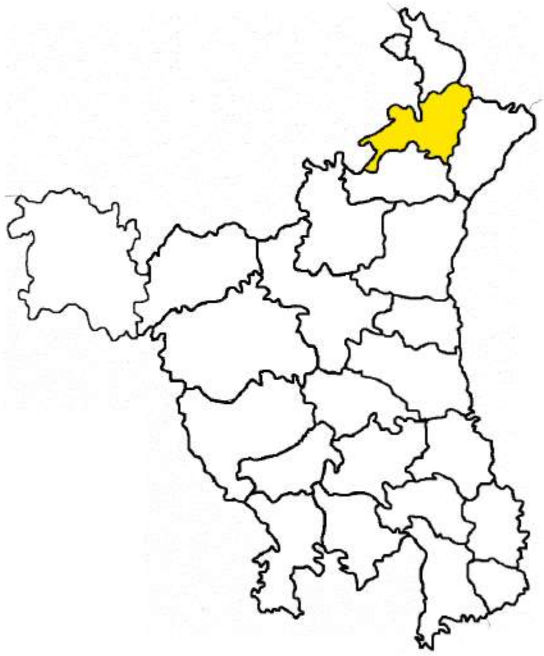
- Identification & development of alternate sites for Industries operating in non-conforming zones.
- DIC Rohtak may discuss the issue of taxes collected by municipal corporation Rohtak with the concerned authorities.
- HSIIDC & UHBNV may standardize the norms of building plan for factory license clearance.
- Issue of maintenance of Industrial areas, and need for dispensary, STP/ street lights etc. may be discussed with HSIIDC.
- DIC Rohtak can organize need based seminars for MSMEs on various schemes & new manufacturing & marketing concepts.
- Since, MSMEs work on a relatively small working capital, a framework on incentives/penalties on timely payments of MSMEs by anchor units needs to be worked out.

14. POTENTIAL AREAS OF INVESTMENT

- Rohtak is primarily known for its fasteners industry, with more than 558 MSMEs registered in manufacturing of 'Fabricated Metal Products'. The industry can be developed further via more investment towards facilities producing raw material supplies to these units such as Iron & Steel etc., common display centre for the MSME units, and marketing/product development support for diversifying into African & European markets.
- Wearing Apparel sector in Rohtak with around 700 MSMEs can be further developed via investment towards common Design Centers and retailing & marketing support to these MSMEs.

08. Ambala

District Profile



EXECUTIVE SUMMARY

District Profile

MSME Scenario

08

Ambala

Famous for....

"Scientific Instruments & Kitchen Appliances"

1 MSMEs in Ambala

Total number of MSME units **2,244**

New MSME units (last 3 years) **705**

Wearing Apparel

Food Products

Machinery & Equipment

Textiles

Pharmaceuticals

Top 5 sectors – Maximum number of MSMEs

2 Investment Scenario in Ambala

Total Investment (INR Lakhs) **57,227**

New Investment (last 3 years; INR Lakhs) **11,658**

Machinery & Equipment

Food Products

Pharma

Textiles

Chemicals

Top 5 sectors – Maximum investment by MSMEs

3 Employment Scenario in Ambala

Total Employment **17,636**

New Employment (last 3 years) **3,582**

Food Products

Machinery & Equipment

Pharma

Wearing Apparel

Chemical & Chemical Products

Top 5 sectors – Most employment generated

4 Potential for MSMEs

- Cluster development opportunity in Machinery & Food Products sectors
- Investment opportunity towards raw material supplies to Scientific Instruments & Machinery/Equipment sectors

5 Others

Total Exports (FY 18-19; INR Lakhs) **15,960**

Number of Large & Mega units **7**

Existing Clusters **4 Mini Clusters**

1. INTRODUCTION

Ambala was formed as a district by the British in 1847 to include large areas of present-day Punjab, Himachal & Haryana such as Ambala, Kharar, Naraingarh, Ropar, Jagadhari etc. After independence, some of these areas were transferred to Punjab & Himachal Pradesh, and later Kalka & Jagadhari tehsils were transferred to the newly formed districts of Panchkula & Yamunanagar respectively. Present day Ambala includes areas of Ambala, Ambala Cantt, Barara & Naraingarh. The district is known for its Scientific Instruments & Beverages Industry.

1.1 Geography

Ambala lies in the north of the Haryana state, and is surrounded by Panchkula in the north, Himachal Pradesh (Sirmour Distt.) in the North-east, Yamunanagar on the east, Punjab (Patiala & SAS Nagar Distt.) on the west & Kurukshetra on the south. Altitude of the district is around 900 feet above sea level. The terrain of the district is mostly flat with a very small part bordering Himachal Pradesh belonging to Shivalik foothills.

Ambala has tropical, continental & & semi-arid kind of climate with extremely hot summers. The district receives mostly monsoon rainfall in the months of July, August, September and some winter rainfall in January & February. Markanda, Dangri, Ghaggar rivers & their tributaries are the key river streams of the district however all of them are non-perennial. Because of low-stretch & seasonal nature of these river streams most of the irrigation depends upon wells & tubewells. Soil type found in Ambala can be described as clay loam at depth & sandy loams on the surface.

1.2 Demographic Profile

As per the census of 2011, total population of Ambala is 11.28 Lakhs persons with a population density of 717 per sq. km. It constitutes approximately 4.45% of total Haryana population. Rural to urban percentage distribution is 55.62% & 44.38% respectively. Average literacy rate of Ambala is 81.75% with a male literacy rate of 87.34% and female literacy rate of 75.50 %. The district has a female to male ratio at 885 females per thousand males, which is higher than the state average of 877 but significantly lower than the national average of 940. Population growth for Ambala for the decade 2001-2011 is 11.23%.

1.3 Administrative Set-up

Ambala has a total land area of 1574 Sq. Km. The district has four tehsils namely Ambala, Ambala Cantt, Barara & Naraingarh & three sub-tehsils Saha, Mullana & Shahzadpur. Ambala also has 4 Constituencies, 4 sub-divisions, 6 blocks & 408 villages.

The following table shows categorization of blocks as per the status of industrial development.

Table 65: **[Ambala]** Categorization of Blocks

Block A	Block B	Block C	Block D
	Ambala-I	Barara	
	Ambala-II	Naraingarh	
	Saha	Shehzadpur	

2. SECTOR WISE MSME LANDSCAPE

Following table shows the total number of MSME units in each sector, in Ambala, along with the bifurcation of number of micro, small and medium enterprises.

The table also shows number of new units that started their commercial production in the last three financial years.

Table 66: **[Ambala]** No. of MSME Units in each Sector

S. No.	Industry	Total Units	Micro	Small	Medium	New Units (Last 3 Years)
Food, Beverages & Tobacco						
1	Food products	377	268	108	1	151
2	Beverages	30	18	11	1	9
Textiles & Apparel						
3	Textiles	142	125	14	3	52
4	Wearing apparel	252	241	11	0	177
Leather, Wood & paper						
5	Leather and related products	34	27	7	0	10
6	Furniture	57	48	9	0	14
Pharma, Petro-Chemicals, Rubber products						
7	Pharmaceuticals, medicinal chemical and botanical products	126	92	32	2	43
8	Chemicals and chemical products	112	81	30	1	50
Metals & Mineral Products						
9	Basic metals	46	35	9	2	9
Electrical, Electronics & Machinery						
10	Computer, electronic and optical products	121	103	18	0	17
11	Machinery and equipment	223	171	52	0	18
Automotive & Auto-Components						
12	Motor vehicles,	21	14	7	0	7

	trailers and semi-trailers					
Other Manufacturing						
13	Other manufacturing	703	593	109	1	148

Following scatter diagram shows the comparison between total units in each sector vis-a-vis new units opened in the last 3 financial years.

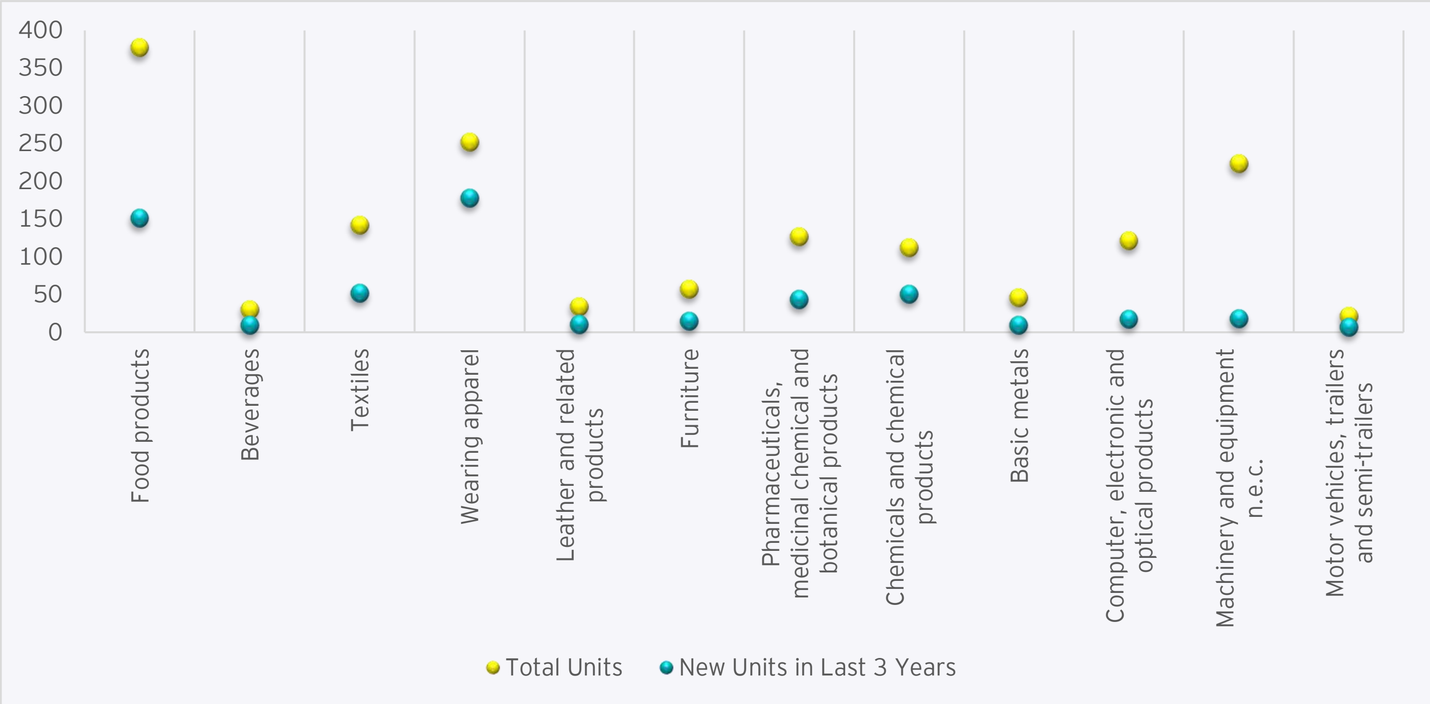


Figure 64: **[Ambala]** Total Units & New Units in each Sector

2.1 Top 10 Sectors: Based on Number of Units

Following table shows top ten sectors in Ambala, based upon the total number of MSME units in the district.

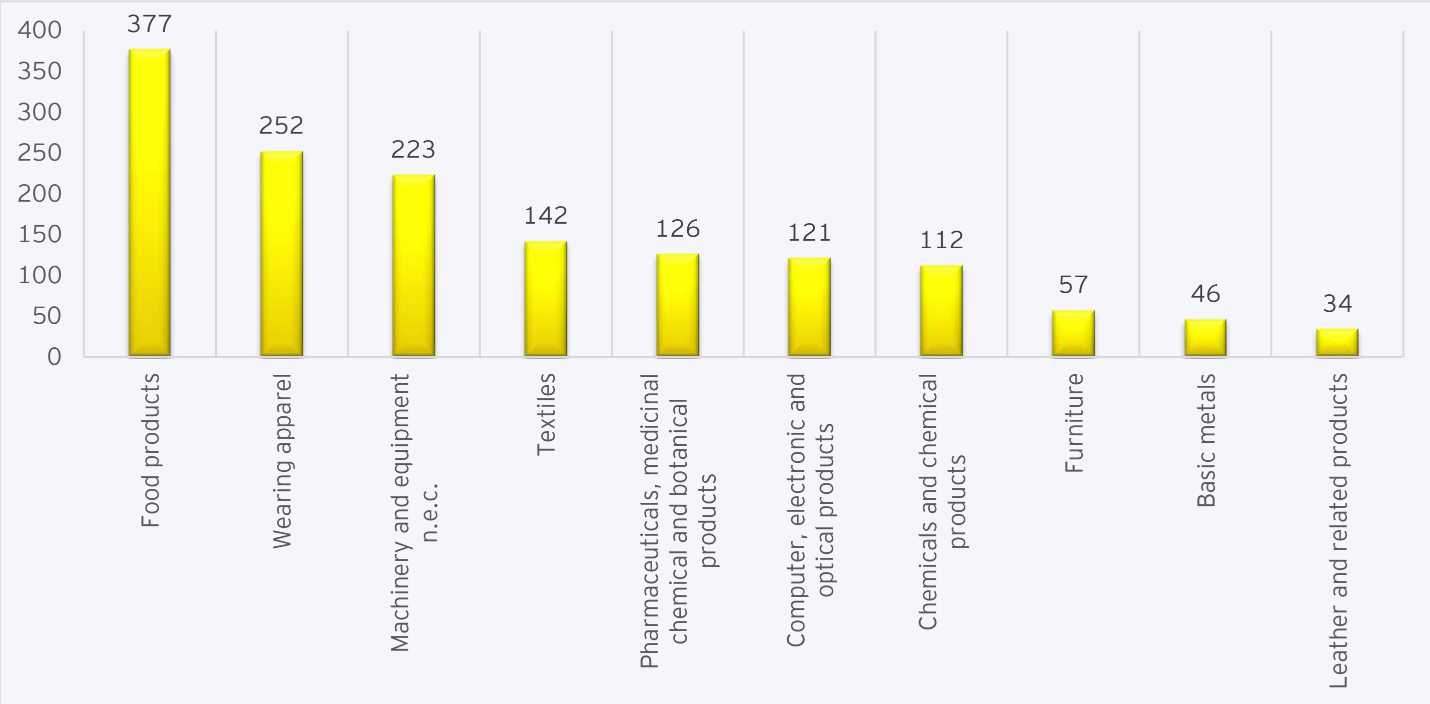


Figure 65: **[Ambala]** Top 10 sectors - Total No. of MSME Units

2.2 Top 10 Sectors: Based on New Units in Last 3 Years

Following table shows the top ten sectors in Ambala, based upon number of new MSME units set-up in the last three years.

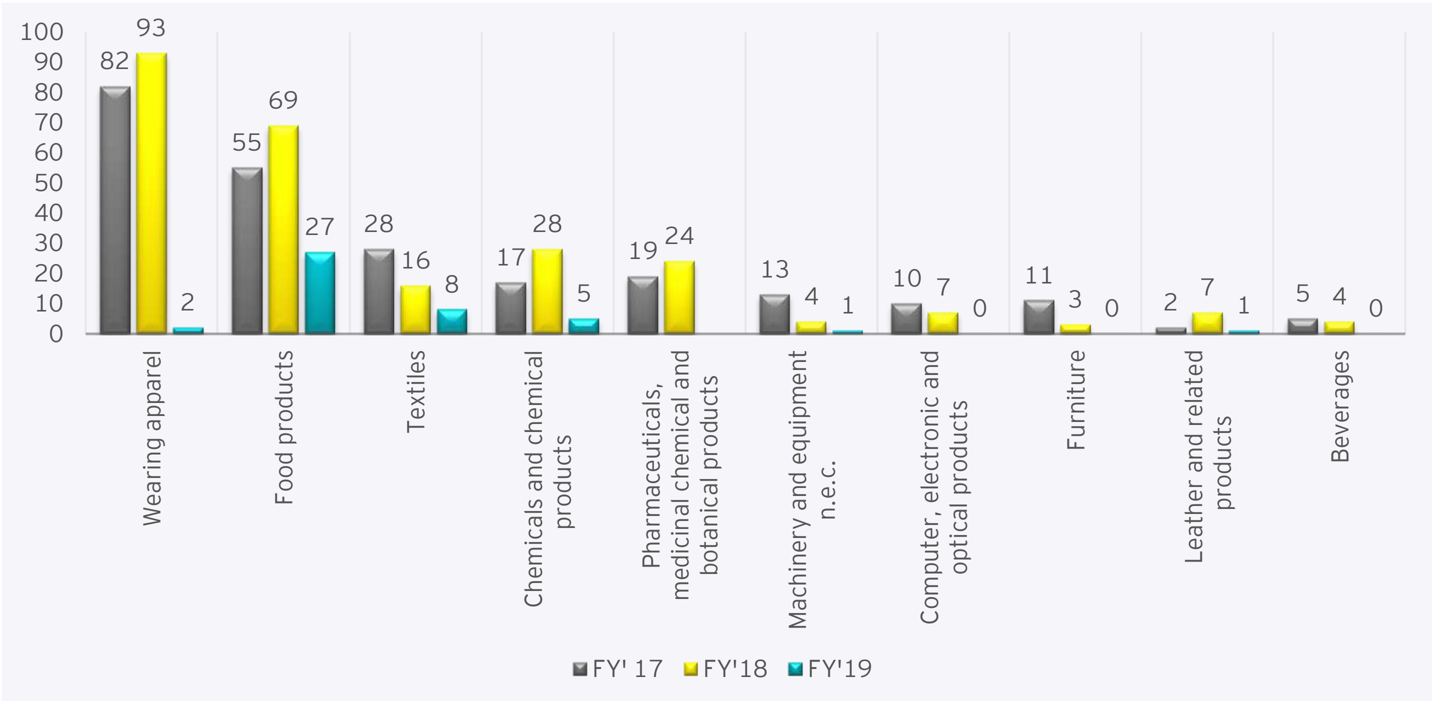


Figure 66: **[Ambala]** Top 10 Sectors - New Units in Last 3 Years

Key Takeaways

- Maximum no. of MSME units in Ambala are involved in the food products sector, followed by wearing apparel.
- Apart from food products & wearing apparel; machinery & equipment, textile & pharma sector have significant number of MSMEs operating out of Ambala.
- In last three years, wearing apparel sector has seen maximum number of new MSME units opened (177), followed by food products (151) & textiles (52).
- In terms of percentage growth, wearing apparel has experienced impressive recent growth with 70.24% of the total units having opened up in the last 3 years, followed by chemicals & chemical products (44.64%) & food products (40.05%).

3. SECTOR WISE INVESTMENT SCENARIO

Punjab National Bank is the convener bank of State Level Bankers' Committee (SLBC) in Haryana and also the district lead bank of Ambala.

Following table shows the total investment by MSMEs in each sector in Ambala, along with new investment in the last three financial years (figures are in Lakhs).

Table 67: **[Ambala]** Total Investment by MSMEs

S. No.	Industry	Investment (INR Lakhs)				
		Total Investment	FY'17	FY'18	FY'19	New Investment (Last 3 Years)
Food, Beverages & Tobacco						
1	Food products	13670	990	3596	592	5178
2	Beverages	1820	123	78	0	201
Textiles & Apparel						
3	Textiles	4472	324	86	481	891
4	Wearing apparel	1431	230	328	4	562
Leather, Wood & paper						
5	Leather and related products	793	8	76	20	104
6	Furniture	1402	173	69	0	242
Pharma, Petro-Chemicals, Rubber products						
7	Pharmaceuticals, medicinal	5211	297	386	0	683

	chemical and botanical products					
8	Chemicals and chemical products	3112	553	110	23	686
Metals & Mineral Products						
9	Basic metals	2430	814	35		849
Electrical, Electronics & Machinery						
10	Computer, electronic and optical products	1842	102	103	0	205
11	Machinery and equipment	6595	170	160	15	345
Automotive & Auto-Components						
12	Motor vehicles, trailers and semi-trailers	913	22	10	0	32
Other Manufacturing						
13	Other manufacturing	13536	843	619	218	1680

Following scatter diagram shows a comparison of total MSME investment and new investment in the last 3 financial years, across different sectors of Ambala (except 'Food products' sector which being a clear outlier has not been depicted in the graph).

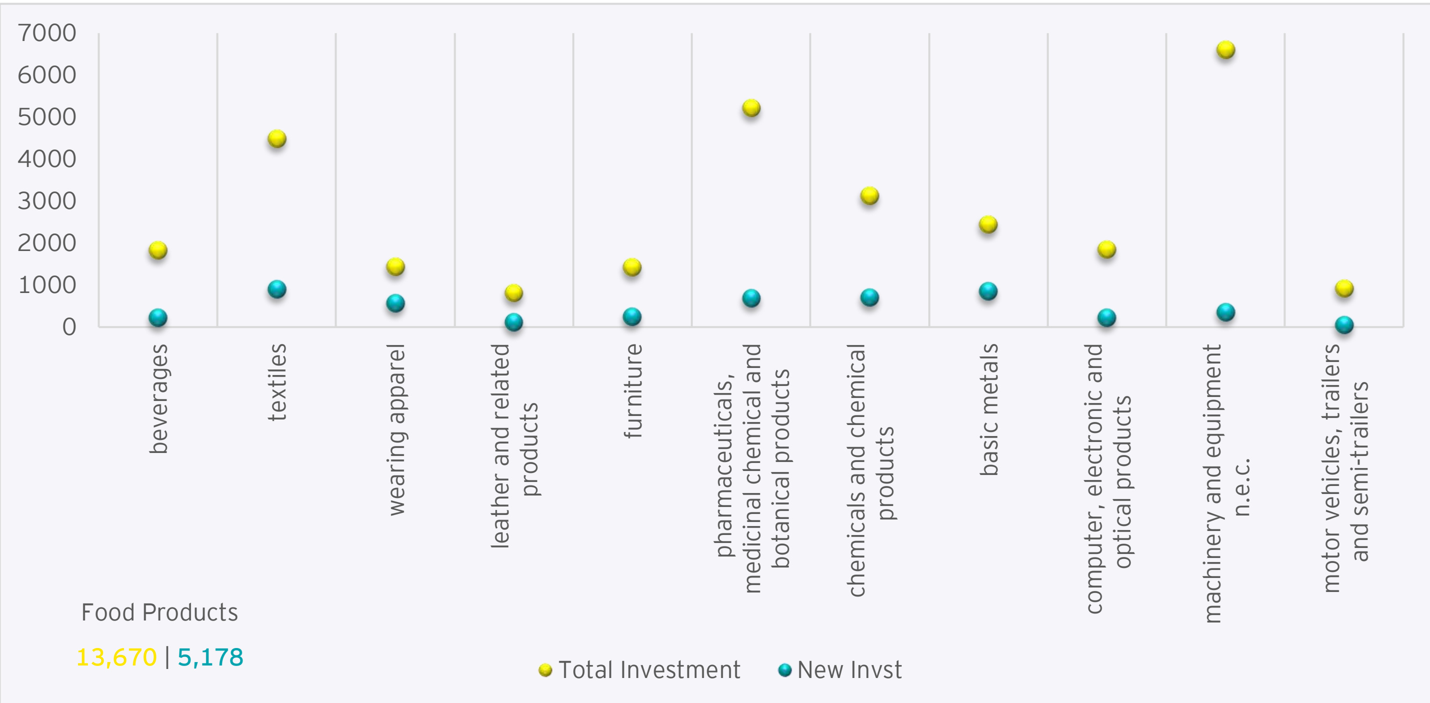


Figure 67: **[Ambala]** Total Investment & New Investment in Last 3 Financial Years (FY'17-FY'19)

Following pie-chart showcases the sectors that have attracted maximum investments in the last 3 financial years (figures are in Lakhs).

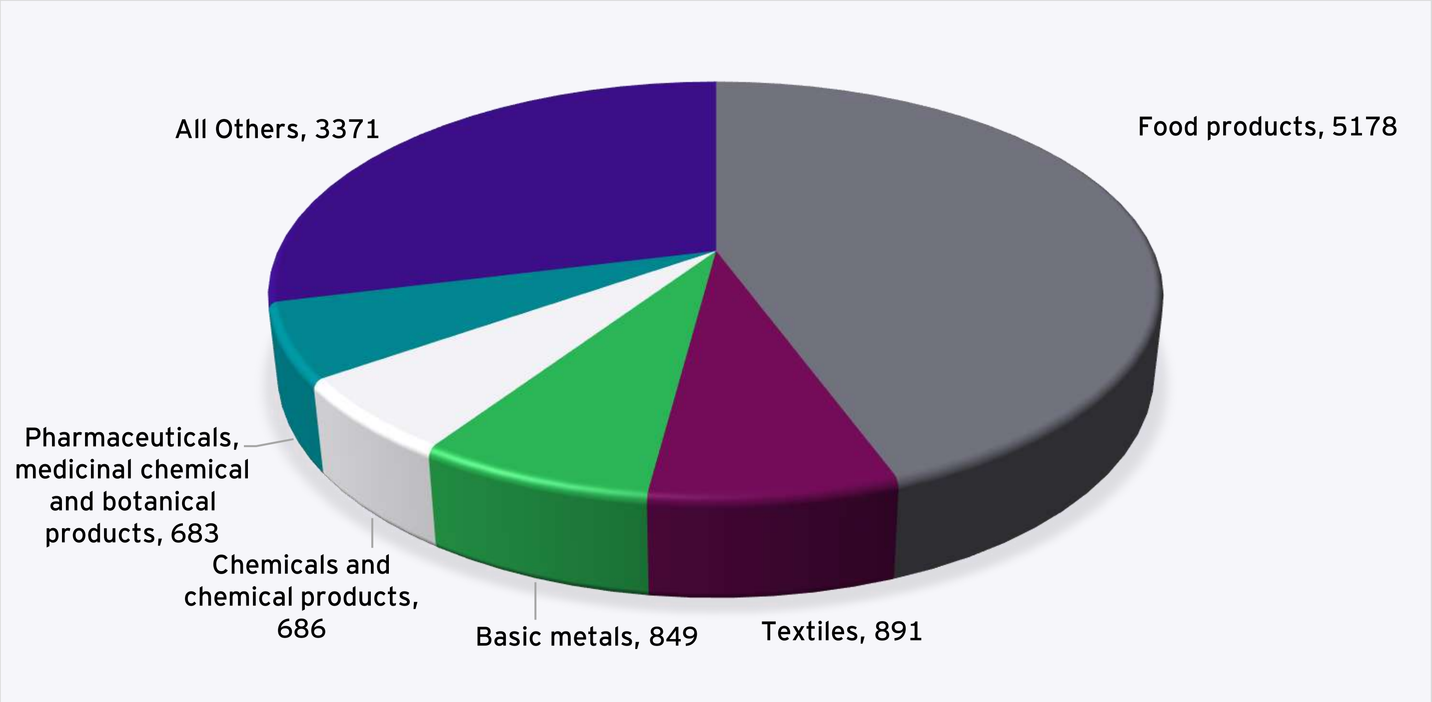


Figure 68: **[Ambala]** Top 5 Sectors with maximum investment in last 3 Financial Years (FY'17-FY'19)

Following diagram shows a comparison of compound annual growth rate of various sectors for last three financial years.

Figure 69: **[Ambala]** CAGR for Last 3 Financial Years (FY'17-FY'19)

Key Takeaways

- Highest amount of investment by MSMEs in Ambala has been in food products sector (INR 136.70 Cr) followed by machinery & equipment' sector (INR 65.95 Cr).
- Apart from having the highest total investment, food products sector has also experienced highest new investment in the last three financial years at INR 51.78 Cr followed by textiles sector (INR 8.91 Cr).
- As evident apart from food products, textiles & basic metals, chemical & chemical products and pharma products have attracted the maximum investments in last three financial years.
- Sectors with high CAGR in MSME investments in last 3 FYS are: wearing apparel (18.09%), food products' (17.20%) and basic metals' (15.41%).

4. SECTOR WISE EMPLOYMENT SCENARIO

Below table showcases the total employment created by MSMEs in each of the sectors, along with new employment created in the last three financial years.

Table 68: **[Ambala]** Total Employment in each Sector

S. No.	Industry	Total Employment	FY'17	FY'18	FY'19	New Employment (Last 3 Years)
Food, Beverages & Tobacco						
1	Food products	2692	311	661	142	1114
2	Beverages	266	80	10	0	90
Textiles & Apparel						
3	Textiles	735	106	46	82	234
4	Wearing apparel	875	241	341	3	585
Leather, Wood & paper						
5	Leather and related products	227	6	42	8	56
6	Furniture	356	54	6	0	60
Pharma, Petro-Chemicals, Rubber products						
7	Pharmaceuticals, medicinal chemical and botanical products	1730	117	157	0	274

8	Chemicals and chemical products	817	84	103	13	200
Metals & Mineral Products						
9	Basic metals	262	28	16	0	44
Electrical, Electronics & Machinery						
10	Computer, electronic and optical products	810	49	34	0	83
11	Machinery and equipment	3146	85	24	5	114
Automotive & Auto-Components						
12	Motor vehicles, trailers and semi-trailers	316	12	6	0	18
Other Manufacturing						
13	Other manufacturing	5404	339	228	143	710

Following scatter diagram shows a comparison of total employment across different MSME sectors and new employment generated in the last 3 financial years.

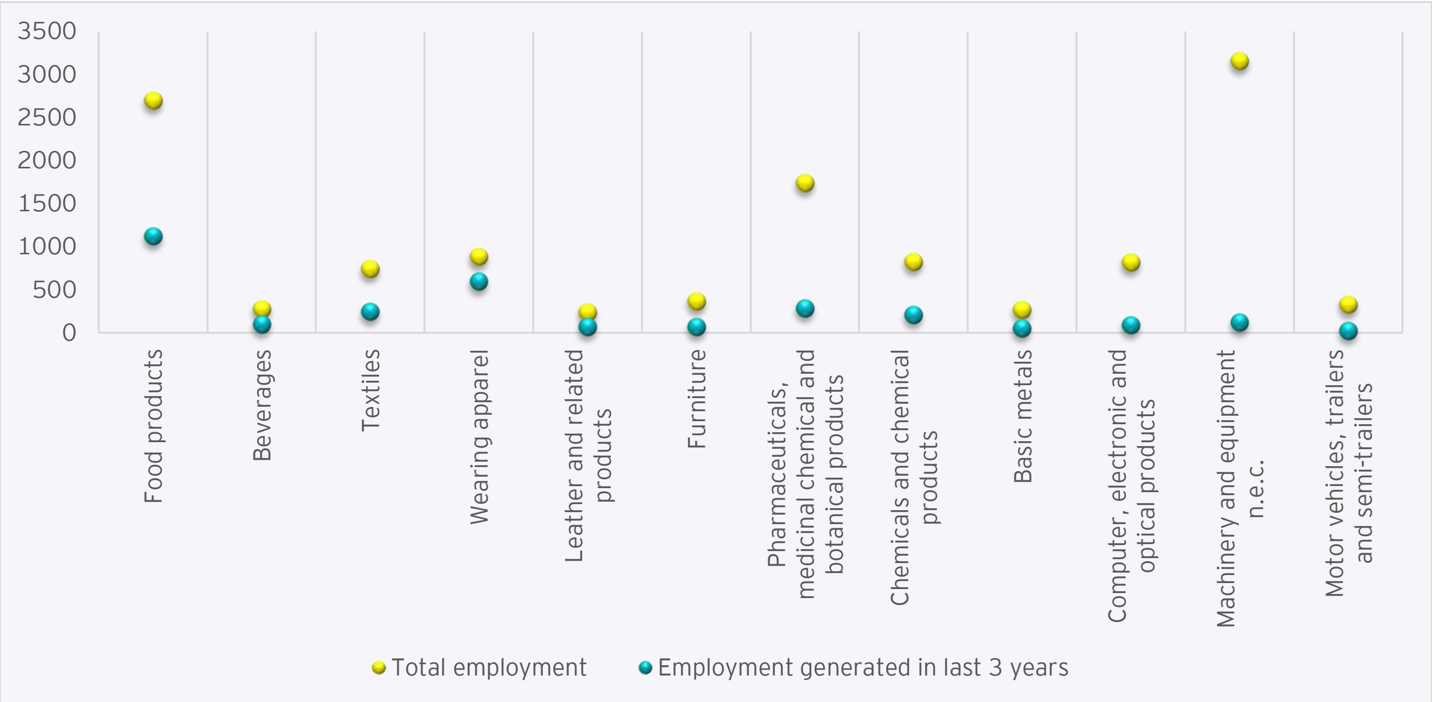


Figure 70: **[Ambala]** Total Employment & New employment in last 3 Financial Years (FY'17-FY'19)

Following bar chart showcases category wise per unit employment analysis for MSMEs in Ambala.

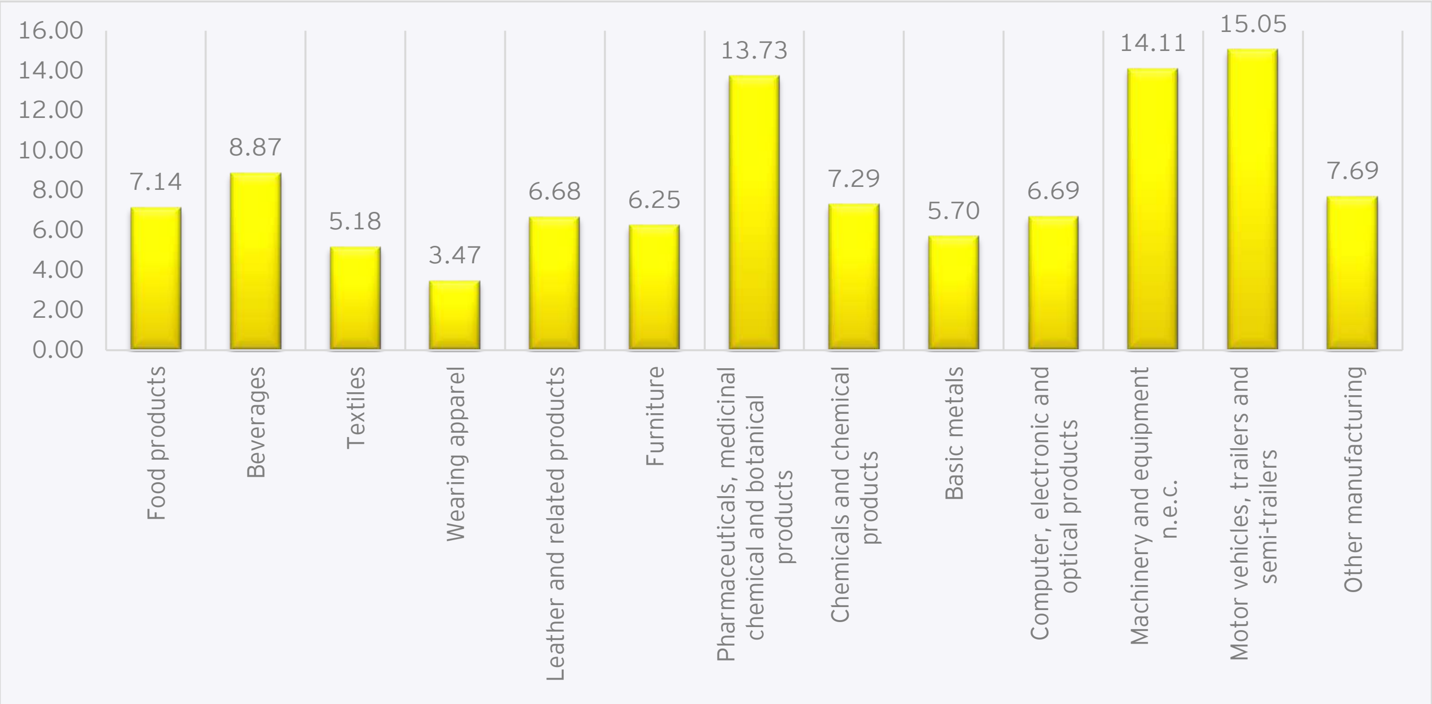


Figure 71: **[Ambala]** Category wise employment intensity

Following pie-charts showcase the sectors that have created maximum employment in each of the last 3 financial years.

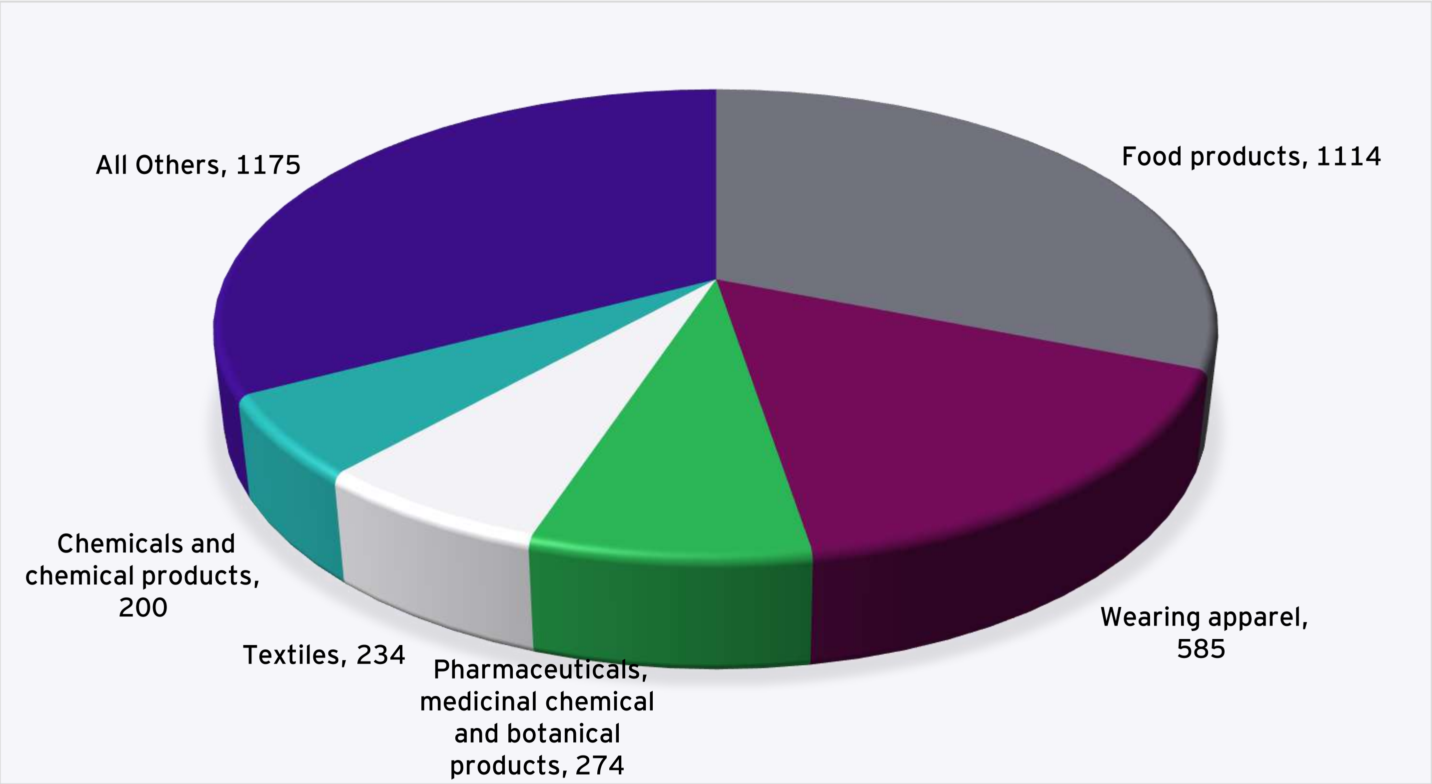


Figure 72: **[Ambala]** Top 5 Sectors with maximum new employment in last 3 Financial Years (FY'17-FY'19)

Key Takeaways

- Machinery & equipment MSME sector provides the maximum employment (3146) followed by food products sector (2692) & pharma sector (1730).

- Food products sector has created the maximum new employment in last 3 years (1114), followed by wearing apparel (585) & pharma (274). Sectors such as 'motor vehicles, trailers, semi-trailers', basic metals, leather & related products have experienced relatively low growth in new employment.

- 'Motor vehicles, trailers, semi-trailers' sector has maximum employment intensity with an average of 15.05 employees per unit, followed by machinery & equipment with 14.11 employees per unit and pharma at 13.73 employees per unit.

- Wearing apparel has the least employment intensity with only 3.47 employees per unit, followed by textiles at 5.18 employees per unit.

- Food products sector has created the maximum employment in Ambala in last three years, followed by the wearing apparel sector. Other sectors in top 5 in terms of employment creation in last 3 years are pharma, textiles & chemical products.

5. EXPORTS FROM THE DISTRICT

Key exports products from Ambala include scientific & educational instruments such as various kinds of laboratory equipment etc. Following table shows some of the exports from Ambala for last 3 FYs.

(The export data in the table shows only exports related information that is available at the District Industries Centre, Ambala, and actual exports figure might be significantly higher).

Table 69: Exports from Ambala

S. No.	Industry	Exports (INR Lakhs)		
		FY'17	FY'18	FY'19
1	Scientific & Educational Instruments	22771.35	13752.48	15609.6
2	Wearing Apparel	--	333.73	351

6. NATURAL RESOURCES & RAW MATERIAL AVAILABLE

Major minerals available in Ambala include those used in construction & related activities such as boulder, gravel, sand, limestone, dolomite etc.

Ambala has a total forest cover of around 52 sq. km and the main flora consists of Eucalyptus, Poplar, Kikar, Shisham etc.

Among agricultural produce, key crops grown in Ambala include cereals such as Rice, Maize, Wheat, Barley, Bajra, Pulses such as Lentils, Grams, Chickpeas, Tur and Oilseeds such as sunflower, mustard and sugarcane.

7. KEY INDUSTRIAL ESTATES

Ambala currently has four Industrial estates. These are:

Table 70: Key Industrial Estates in Ambala

S. No	Name of Industrial Area	No of Plots	No of allotted Plots	No of Vacant Plots	No of Units in Production.
1	Saha Phase 1	670	467	203	195
2	Saha Phase 2 (Under Litigation)	N.A.	N.A.	N.A.	N.A.
3	I.E. Ambala Cantt.	130	130	0	107

4	A/City	28 plots & 24 sheds.	28 plots & 24 sheds.	0	28 plots & 24 sheds.

8. MAJOR LARGE-SCALE UNITS

Apart from MSMEs, Ambala also has quite a few Large & Mega enterprises operational in various sectors. Below table showcases number of Large & Mega enterprises in each sector along with their names.

Table 71: **[Ambala]** Large & Mega Units in each Sector

S. No.	Industry	Number	Names of Large & Mega Units
1	Computer, Electronic & Optical products	1	• M/S Labotrone Instruments Ltd.
2	Food Products	2	• M/S Naraingarh Sugar Mills • M/s Samriti Foods, Saha
3	Textiles	1	• M/S Partap Spintex Pvt. Ltd. • M/s Nufab Technical Textile (P) Ltd • M/s Partap Fabrics (P), Ltd
4	Beverages	1	• M/S Kandhari Beverages Pvt. Ltd. • M/S N.V Distillery • M/S Mount Shivalik • M/s Oasis Commercial Pvt. Ltd • M/s Adie Browson Distillers & Bottlers Pvt Ltd. • M/s Manpasand Beverages Ltd. • M/s Allied Blenders and Distilleries
5	Chemicals & Chemical Products	1	• M/s Parijat Industries India Pvt. Ltd.
6	Basic Metals	1	• M/s HMM Infra Ltd.

9. SERVICES SECTOR SNAPSHOT

Apart from manufacturing there are several MSMEs also involved in Services sector. Below table gives snapshot of the key services sectors in Ambala:

Table 72: **[Ambala]** Services Sector Snapshot

S. No.	Industry	Total Units	Micro	Small	Medium	Total Investment (INR Lakhs)	Total employment
1	Warehousing and support activities for transportation	41	25	16	0	730	230
2	Office administrative, office support and other business support activities	83	72	11	0	738	265
3	Educational support services	131	118	13	0	702	670
4	Other professional, scientific and technical activities	170	144	26	0	1209	635
5	Other personal service activities	220	202	18	0	1280	588

10. CLUSTERS SCENARIO

There are currently 4 clusters under the Govt. of Haryana's Mini Cluster Development Scheme in Ambala at various stages of implementation.

Table 73: Mini Clusters in Ambala

S. No.	Cluster	Location	Cluster Identification	DSR Preparation	DPR Preparation	Implementation
1	General Engineering Cluster	Ambala	√	√	√	√
2	Sheet Metal Cluster	Ambala	√	√	√	√
3	Electronics Cluster	Ambala	√	√	√	

4	Kitchen Appliances Cluster	Ambala	√	√	√	

A grant of INR 89.95 Lakhs has already been released for the General Engineering Cluster and INR 180 Lakhs for the Sheet Metal Cluster as of September 2019.

11. INDUSTRY ASSOCIATIONS

The key industrial associations in Ambala are:

Table 74: Industry Associations in Ambala

S. No.	Name of Association	President/General Secretary	Address	Contact	Email ID
1	Ambala Scientific Instruments Industries Association	Jitender Sehgal, President, Sh. Uma Kant, General Secretary	M/s BL Scientific India, Nicholoson Roa Near BJP office, Ambala Cantt	9416024657, 9315101170	asimaindia@gmail.com
2	Rice Sheller Association	Sh. Raj Kumar Singla, President, Sh. Kamal Singla, General Secretary	M/s Jay Vee Rice Mills, Hisar Road, Ambala City	9416600030, 9416156660	haryanaricemillerassociation@gmail.com
3	Electrical Association	Sh, Ajay Aggarwal, President, Sh. Kuldeep Ahuja, General Secretary	M/s Supriya Electrical, Near Old Jain School, Timber Market, Ambala Cantt.	9215215117, 8590012356	ajayaggarwal0079@gmail.com
4	Scientific Apparatus Manufacturers Association	Sh. Kailash Nath Dheer, President, Sh. Arun Goel, General Secretary	M/s Electrical Timber Market, Ambala Cantt	9416447413, 9416024134	msw.dhir@gmail.com
5	Industrial Estate Association	Sh. D.C. Gupta, President	108-IE, Ambala Cantt	9896137853, 9315837853	deliteplastics@rediffmail.com
6	Indl. Association	Sh. Rajbeer Choudary. President	M/s Sampooran Packers, 327-28, Industrial	9812000043, 9416027983	md@sampuranpackaging.com, contactsiaa@gmail.com

			Growth Centre, Saha, Ambala		
7	Mixi Association	Sh, Ajay Aggarwal, President, Sh. Kuldeep Ahuja, General Secretary	Electromax home appliance, plot no. 16, New Vita Enclave, Near Baldev Nagar, Ambala city	9215215117, 8590012356	ajayaggarwal0079@gmail.com
8	Scientific Apparatus Manufacturers & Exports	Sh. Umesh Gupta, President, Sh. Ankur Chabra, General Secretary	Kshitji Innovation 2320-21Kaccha Bazzar Ambala Cantt.	9416004422, 9416028983	sameindia1@hotmail.com
9	Saha Food Industries Association	Sh. Rajeev Sharma, President, Sh. N K Jindal, General Secretary	198 food park Saha	9215221169, 980532532	grhealthcare@gmail.com
10	Haryana Chamber of Commerce & Industries	Sh. Arjun Dev Gandhi, Chairman	Near S D College, Ambala Cantt.	9896925271	gandhica@yahoo.com

12. KEY ISSUES OF THE INDUSTRIES

Following are some of the key issues raised by the industry in Ambala:

- Lack of relaxation in Tender fee/ EMD for MSMEs/NSIC registered firms in procurement of Government Organizations such as CSIR Labs, Universities etc. High tender fee/EMDs in the form of demand draft blocks the working capital of small units. Also high turnover conditions of 2-5 crores in many tenders, debars small scale industries from participating in the tender and ends up favoring big companies.

- Need for smaller industrial plots or flatted factory complexes for micro & small manufacturers as they cannot afford to buy big plots.

- Need for Govt. organized seminars on regular basis to provide first-hand information on Govt. policies for MSMEs and financial benefits schemes.

- Difficulty in obtaining Change of Land Use in certain cases.

- Proper maintenance required for electricity infrastructure in HSIIDC Saha which is currently in poor state. Also lack of transportation facilities such as bus services for Saha estate.

- Difficulties & hassles in getting clearances on pollution, fire safety, labor etc.

- Steep hikes in certain license renewal fees such as Factory act license yearly renewal fee hiked 18-20 times.

13. POTENTIAL AREAS OF INTERVENTION

- To boost MSME sector, State govt. may look at MSME specific relaxations in procurement process of Govt. organizations such as relaxations in tender fee/earnest money deposit & minimum turnover condition etc.

- Cluster plug & play scheme which provisions for common infrastructure for MSMEs such as flatted factory complexes etc. may be expedited to further promote new entrepreneurship.

- DIC Ambala may hold meetings/workshops with Industry to apprise them of the various schemes & incentives of Govt. of Haryana & Govt. of India.

- Effective grievance redressal mechanism for utilities issue of Industry such as

Power, Water etc.

- Hikes in Factory Act license renewal fees may be revisited.

14. POTENTIAL AREAS OF INVESTMENT

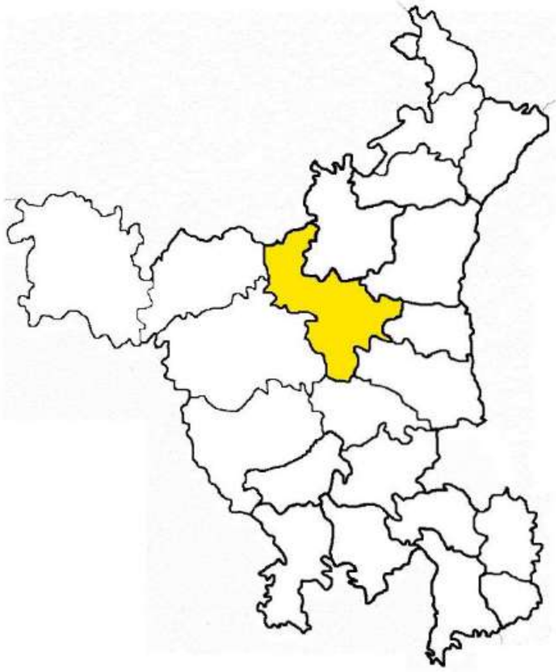
- Ambala is known for its Scientific Instruments Industry which manufactures laboratory equipment such as physics, biology labs, pharmacy/medical equipment, microscope etc. There is significant opportunity for investment towards raw material supply to these units and also effective downstream retailing/ marketing of these products.

- Food products sector also enjoys a significant MSME base in Ambala with more than 350 units, hence offering attractive investment opportunity in Food processing industry which can act as supplier to these units.

- Ambala also has a significantly developed Machinery & Equipment sector with more than 200 MSMEs. Attractive opportunity exists towards investment in parts/components supplies to these units.

09. Jind

District Profile



EXECUTIVE SUMMARY

District Profile

MSME Scenario

09

Jind

Famous for....

"Growing Furniture & Food products Industry"

1 MSMEs in Jind

Total number of MSME units	2,016
New MSME units (last 3 years)	1,029

Food Products

Furniture

Basic Metals

Wearing Apparel

Textile

Top 5 sectors – Maximum number of MSMEs

2 Investment Scenario in Jind

Total Investment (INR Lakhs)	45,169
New Investment (last 3 years; INR Lakhs)	21,130

Food Products

Furniture

Chemical Products

Basic Metals

Beverages

Top 5 sectors – Maximum investment by MSMEs

3 Employment Scenario in Jind

Total Employment	10,711
New Employment (last 3 years)	4,946

Food products

Furniture

Non-metallic mineral products

Basic Metals

Electrical Equipment

Top 5 sectors – Most employment generated

4 Potential for MSMEs

- Significant investment potential in organized marketing of furniture products manufactured in the district and expanding their reach pan-India & overseas
- Food products sector offers investment potential in facilities that can supply cost-competitive quality raw materials to these units

5 Others

Total Exports (FY 18-19; INR Lakhs)	12,760
Number of Large & Mega units	2
Existing Clusters	No clusters currently

1. INTRODUCTION

One of the oldest districts of Haryana, district Jind was also one of the first Sikh Kingdoms. Centrally located, it is the fourth district of what is called the Jat-belt, i.e. Sonipat, Rohtak, Hisar and Jind.

It is believed that the town came into existence during the Mahabharat period and derives its name from the headquarter town Jind. According to the legends, the Pandavas built the temple in honour of the goddess of victory, Jainti Devi, right before going for battle with the Kauravas. The town which prospered around the temple was named Jaintapuri which later came to be known as Jind.

1.1 Geography

Jind is situated in the central part of Haryana and is 125 kms away from Delhi, situated on the Delhi-Ferozpur rail route. Jind district’s border in north is a part of Haryana-Punjab border (Patiala and Sangrur districts). On its west and south-west lies Hisar and Fatehabad districts while it is surrounded by Rohtak and Sonipat in south and south-east.

The climate in Jind is mostly dry. It has four main seasons, November to March is the cold period followed by hot season. The rainfall in the district generally increases from south or south-west to east or north-east. July and August are the rainiest months accounting for more than 50% of the annual rainfall. The monsoon withdraws by mid of September followed by post-monsoon period.

1.2 Demographic Profile

As per the 2011 census, Jind’s total population is 1,334,152 persons across a geographical area of 2,702 sq. kms. Jind district has a population density of 494 persons per sq. km. The population growth rate for Jind in the last decade (2001-2011) was 12.13%. Jind has an average literacy rate of 71.4%, which is still an improvement from 62.1% during 2001 Census. The increase in literacy rate is especially evident amongst the female population of the district. While it was just 48.5% during 2001, it reached 60.8% during 2011. The district’s sex ratio is lower than the national average of 940 and the state average of 879, i.e. 871 females per thousand males. However, it has marginally improved from 852 in 2001.

1.3 Administrative Set-up

The district constitutes of four sub-divisions (Jind, Narwana, Safidon and Uchana). Jind sub-division is further sub-divided into two tehsils (Jind and Julana) while Narwana, Uchana and Safidon comprises of one tehsil each by the same name.

Jind district has five Vidhan Sabha constituencies, namely Julana, Safidon, Jind, Uchana Kalan and Narwana.

The following table shows categorization of blocks as per the status of industrial development.

Table 75: **[Jind]** Categorization of Blocks

Block A	Block B	Block C	Block D
		Jind	Safidon
		Narwana	Julana
		Ujhana	Pillu Khera
			Uchana
			Alewa

The Deputy Commissioner, also the District Magistrate and the Collector, is responsible for the overall administration of the district. Besides, he is under the administrative control of Commissioner Rohtak Division, Rohtak.

2. SECTOR WISE MSME LANDSCAPE

Following table shows the total number of MSME units in each sector, in Jind, along with the bifurcation of number of micro, small and medium enterprises.

The table also shows number of new units that started their commercial production in the last three financial years.

Table 76: **[Jind]** No. of MSME Units in each Sector

S. No.	Industry	Total Units	Micro	Small	Medium	FY' 17	FY'18	FY'19	New Units (Last 3 Years)
Food, Beverages & Tobacco									
1	Food Products	482	387	92	3	72	84	38	194
2	Beverage	19	15	3	1	2	0	5	7
3	Tobacco Products	1	1	0	0	0	0	0	0
Textiles & Apparel									
4	Textiles	82	78	4	0	13	7	9	29
5	Wearing Apparel	140	138	2	0	19	16	32	67
Leather, Wood & paper									
6	Leather & Related Products	44	40	4	0	3	7	12	22
7	Wood & Products of Wood	79	67	12	0	14	0	21	35
8	Paper & Paper Products	34	32	2	0	2	11	8	21
9	Furniture	530	431	96	3	142	59	179	380
Pharma, Petro-Chemicals, Rubber products									

10	Pharmaceuticals, Medical, Chemical & Botanical Products	27	20	7	0	5	6	4	15
11	Chemical Products	57	47	9	1	12	15	9	36
12	Rubber & Plastic	33	25	8	0	2	8	12	22
Metals & Mineral Products									
13	Basic Metals	103	82	21	0	29	9	17	55
14	Non-metallic Mineral Products	70	63	7	0	8	6	9	23
Electrical, Electronics & Machinery									
15	Electrical Equipment	64	59	5	0	14	5	9	28
16	Machinery & Equipment	58	43	15	0	21	16	9	46
Other Manufacturing									
17	Other Manufacturing	193	158	35	0	26	11	12	49

Following scatter diagram shows the comparison between total units in each sector vis-a-vis new units opened in the last 3 financial years.

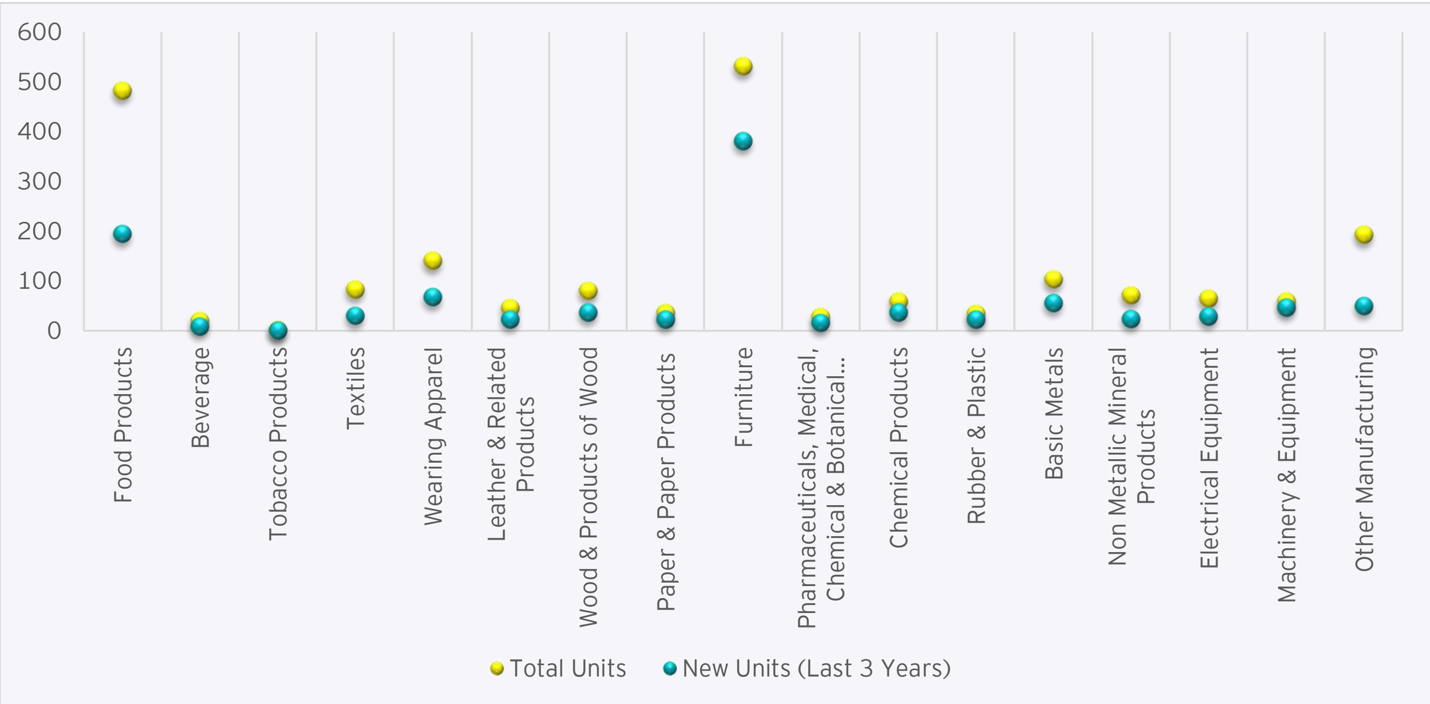


Figure 73: **[Jind]** Total Units & New Units in each Sector

2.1 Top 10 Sectors: Based on Number of Units

Following table shows top ten sectors in Jind, based upon the total number of MSME units in the district.

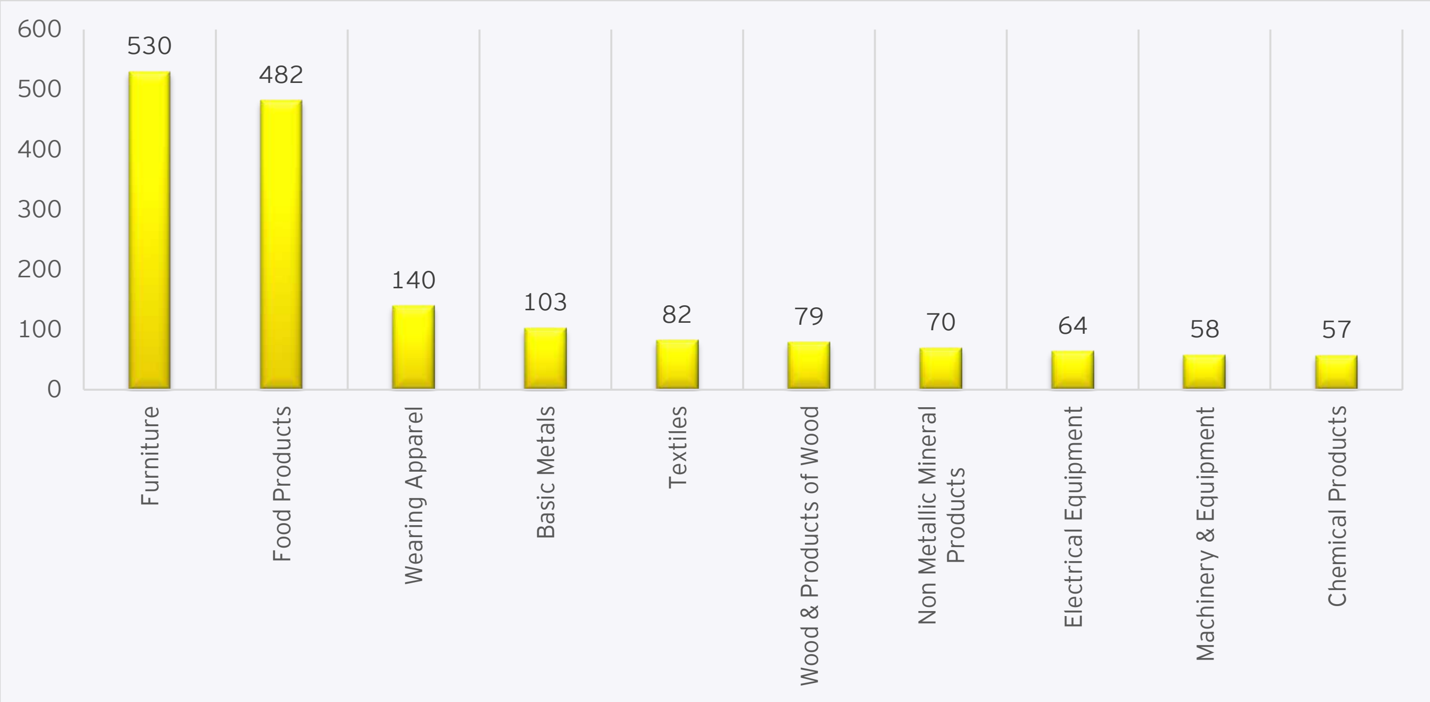


Figure 74: **[Jind]** Top 10 sectors - Total No. of MSME Units

2.2 Top 10 Sectors: Based on New Units in Last 3 Years

Following table shows the top ten sectors in Jind, based upon number of new MSME units set-up in the last three years.

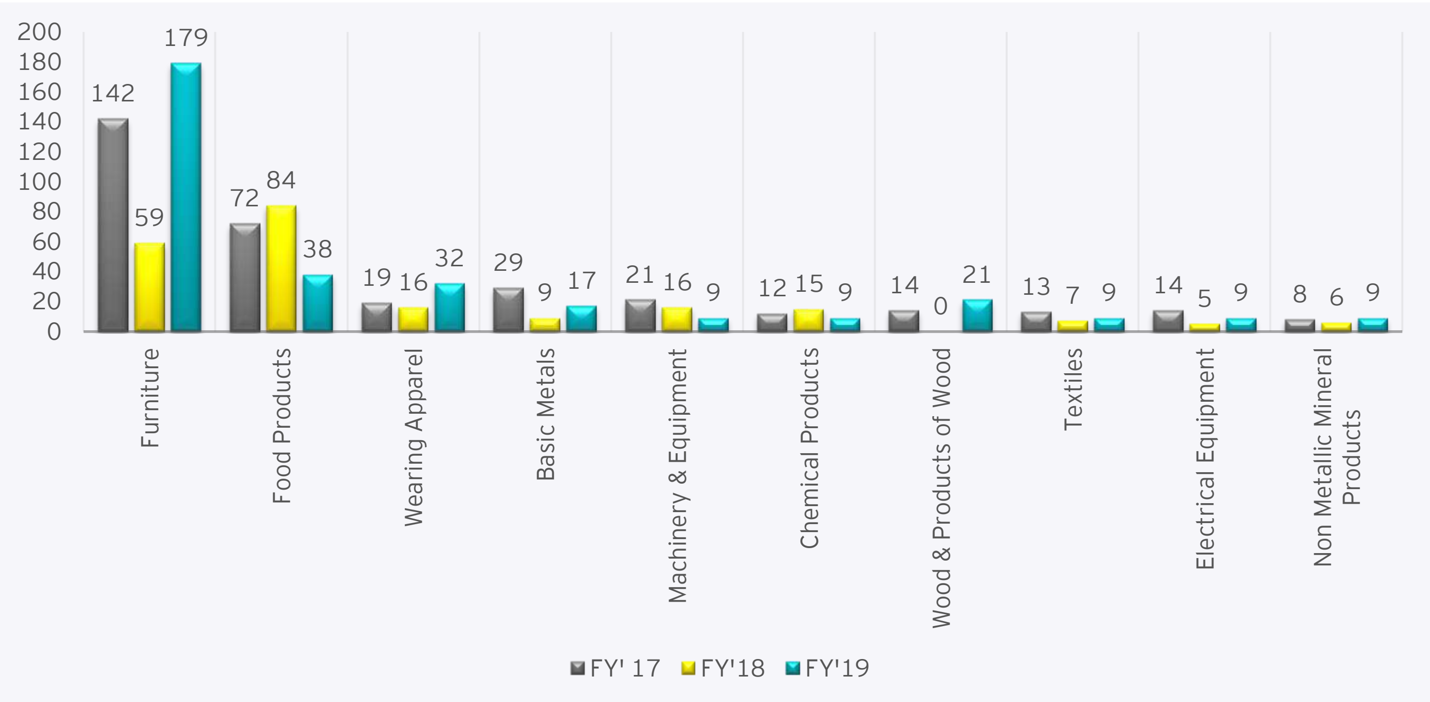


Figure 75: **[Jind]** Top 10 Sectors - New Units in Last 3 Years

Key Takeaways

- Maximum number of MSME units in Jind are involved in the furniture and food products sectors, followed by wearing apparels.
- In the last three years as well, furniture sector has seen maximum number of new MSME units opened (380), followed by food products (194) and wearing apparels (67).
- In terms of the percentage growth, machinery and equipment sector in Jind has seen an increase in recent growth with 79% of the total units having opened up in the last 3 years, followed by furniture.

3. SECTOR WISE INVESTMENT SCENARIO

Punjab National Bank is the convener bank of State Level Bankers' Committee (SLBC) in Haryana and also the district lead bank of Jind.

Following table shows the total Investment by MSMEs in each sector in Jind, along with new investment in the last three financial years (figures are in Lakhs).

Table 77: **[Jind]** Total Investment by MSMEs

S. No.	Industry	Investment (INR Lakhs)				
		Total Investment	FY'17	FY'18	FY'19	New Investment (Last 3 Years)
Food, Beverages & Tobacco						
1	Food Products	13520	1713	2000	621	4334
2	Beverage	1513	5	0	11	16
3	Tobacco Products	1	0	0	0	0
Textiles & Apparel						
4	Textiles	563	78	91	62	231
5	Wearing Apparel	757	95	82	172	349
Leather, Wood & paper						
6	Leather & Related Products	401	28	72	118	218
7	Wood & Products of Wood	779	138	0	242	380
8	Paper & Paper Products	474	25	131	102	258
9	Furniture	14011	3692	1534	4654	9880
Pharma, Petro-Chemicals, Rubber products						

10	Pharmaceuticals, Medical, Chemical & Botanical Products	737	135	161	110	406
11	Chemical Products	1875	382	482	289	1153
12	Rubber & Plastic	875	52	209	302	563
Metals & Mineral Products						
13	Basic Metals	2103	580	182	342	1104
14	Non-Metallic Mineral Products	825	86	67	101	254
Electrical, Electronics & Machinery						
15	Electrical Equipment	1249	265	92	172	529
16	Machinery & Equipment	1301	462	272	109	843
Other Manufacturing						
17	Other Manufacturing	4185	269	234	109	612

Following scatter diagram shows a comparison of total MSME investment and new investment in the last 3 financial years, across different sectors of Jind.

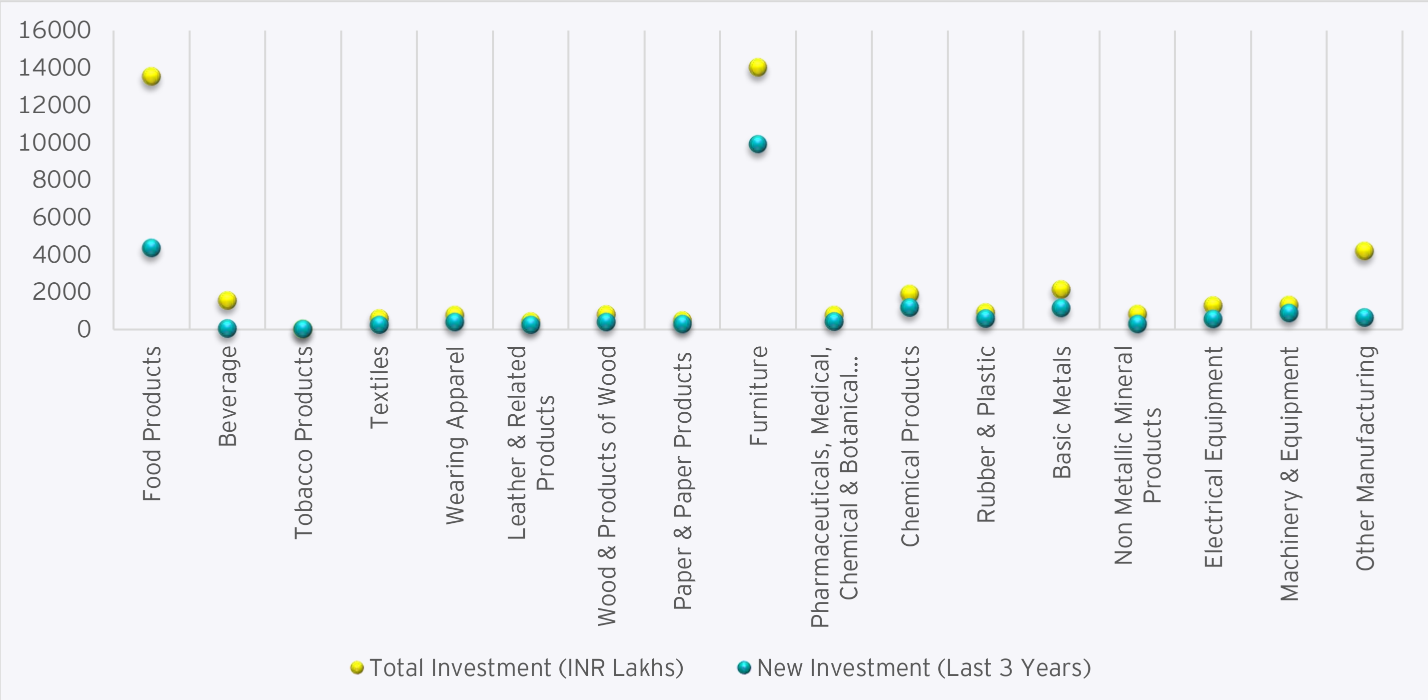


Figure 76: **[Jind]** Total Investment & New Investment in Last 3 Financial Years (FY'17-FY'19)

Following pie-chart showcases the sectors that have attracted maximum investments in the last 3 financial years (figures are in Lakhs).

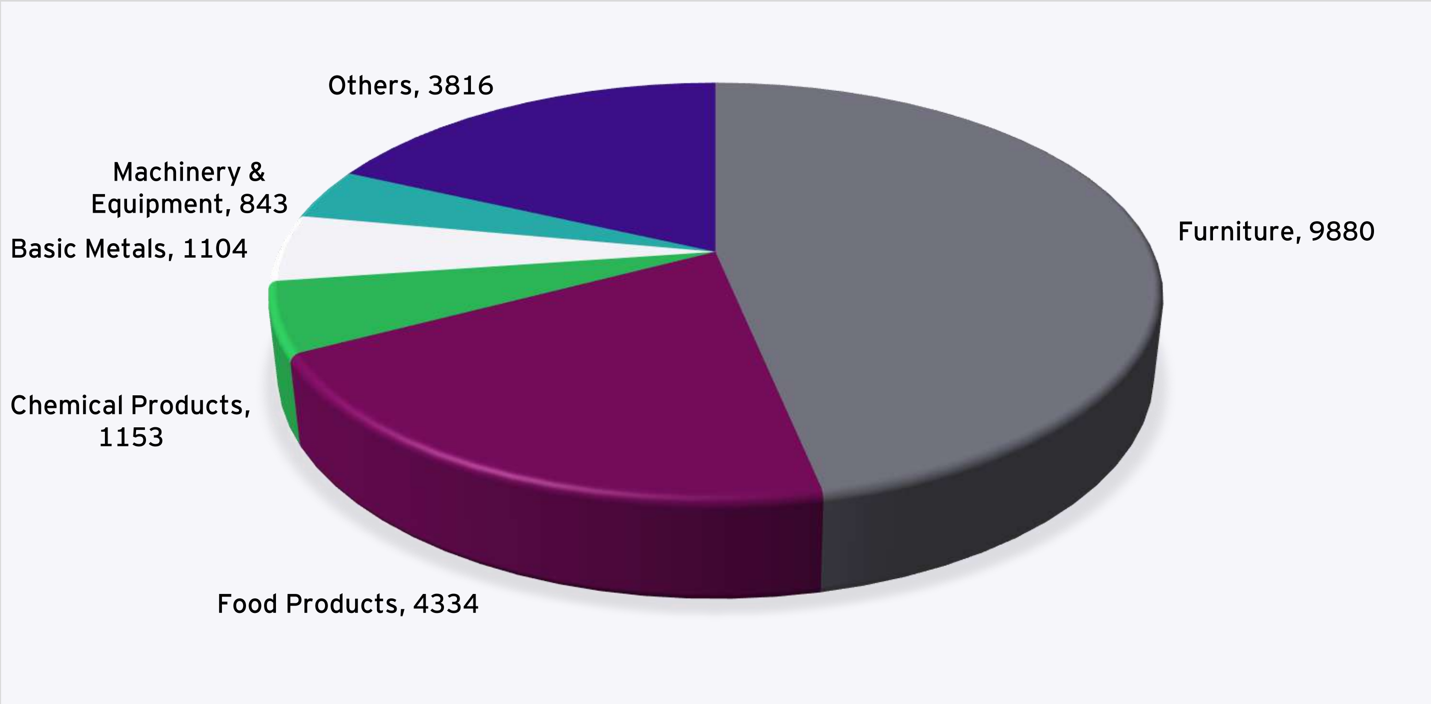


Figure 77: **[Jind]** Top 5 Sectors with maximum investment in last 3 Financial Years (FY'17-FY'19)

Following diagram shows a comparison of compound annual growth rate of various sectors for last three financial years.

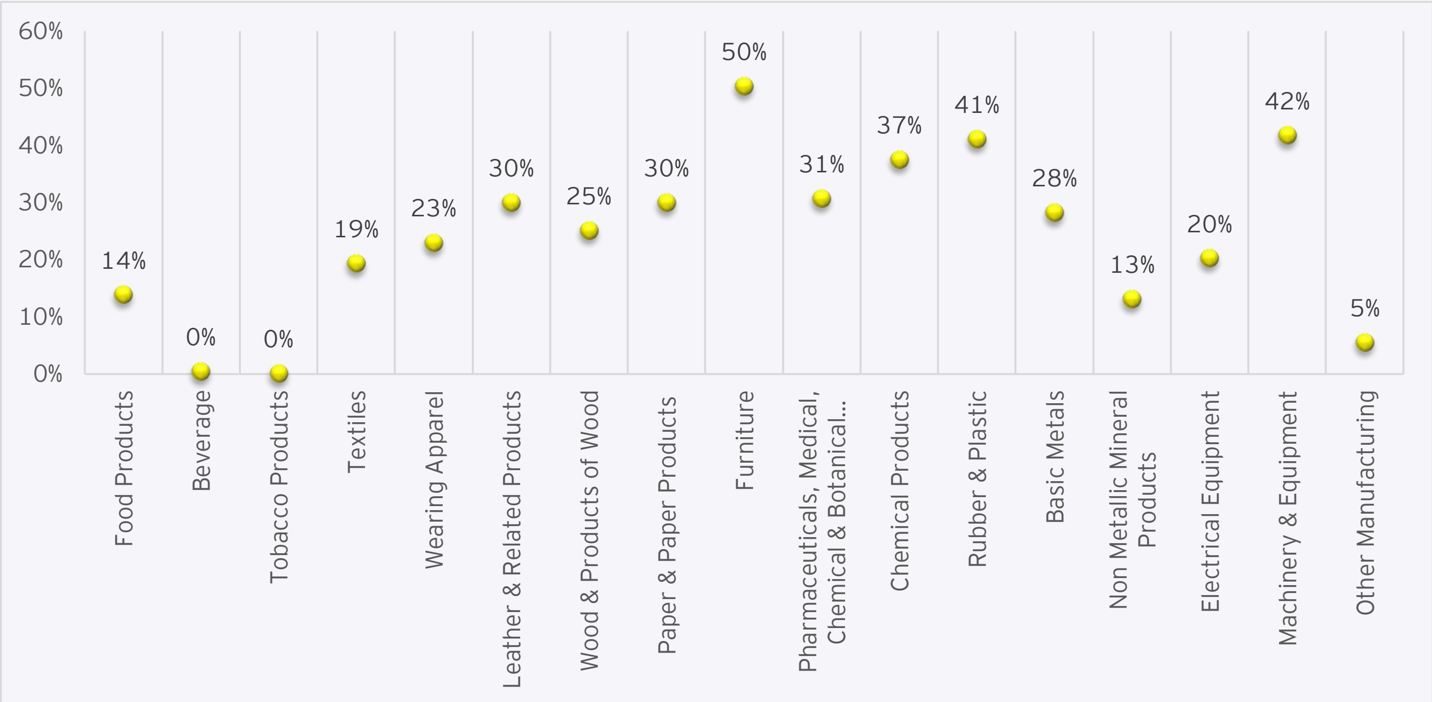


Figure 78: **[Jind]** CAGR for Last 3 Financial Years (FY'17-FY'19)

Key Takeaways

- Highest amount of investment by MSMEs in Jind has been in furniture (INR 140.11 Cr.), followed by food products sector (INR 135.20 Cr.).
- Besides being the sector with highest total investment, furniture sector also attracted maximum investment in the last three financial years (INR 98.80 Cr.) followed by food products (INR 43.34 Cr.).
- Sectors with high CAGR in MSME investments in the last 3 FYs are: furniture (50%), machinery and equipment (42%), rubber and plastic products (41%), chemical products (37%) and pharmaceuticals (31%).

4. SECTOR WISE EMPLOYMENT SCENARIO

Below table showcases the total employment created by MSMEs in each of the sectors, along with new employment created in the last three financial years.

Table 78: **[Jind]** Total Employment in each Sector

S. No.	Industry	Total employment	FY'17	FY'18	FY'19	New Employment (Last 3 Years)
Food, Beverages & Tobacco						
1	Food Products	2650	295	338	173	806
2	Beverage	148	5	0	9	14
3	Tobacco Products	1	0	0	0	0
Textiles & Apparel						
4	Textiles	282	39	21	28	88
5	Wearing Apparel	362	56	47	97	200
Leather, Wood & paper						
6	Leather & Related Products	219	16	27	61	104
7	Wood & Products of Wood	293	57	0	72	129
8	Paper & Paper Products	178	10	52	39	101
9	Furniture	2878	709	294	892	1895
Pharma, Petro-Chemicals, Rubber products						
10	Pharmaceuticals, Medical, Chemical &	171	31	34	27	92

	Botanical Products					
11	Chemical Products	396	83	102	67	252
12	Rubber & Plastic	202	36	49	76	161
Metals & Mineral Products						
13	Basic Metals	622	172	52	106	330
14	Non-Metallic Mineral Products	603	64	49	69	182
Electrical, Electronics & Machinery						
15	Electrical Equipment	453	93	32	42	167
16	Machinery & Equipment	360	125	94	52	271
Other Manufacturing						
17	Other Manufacturing	893	71	52	31	154

Following scatter diagram shows a comparison of total employment across different MSME sectors and new employment generated in the last 3 financial years.

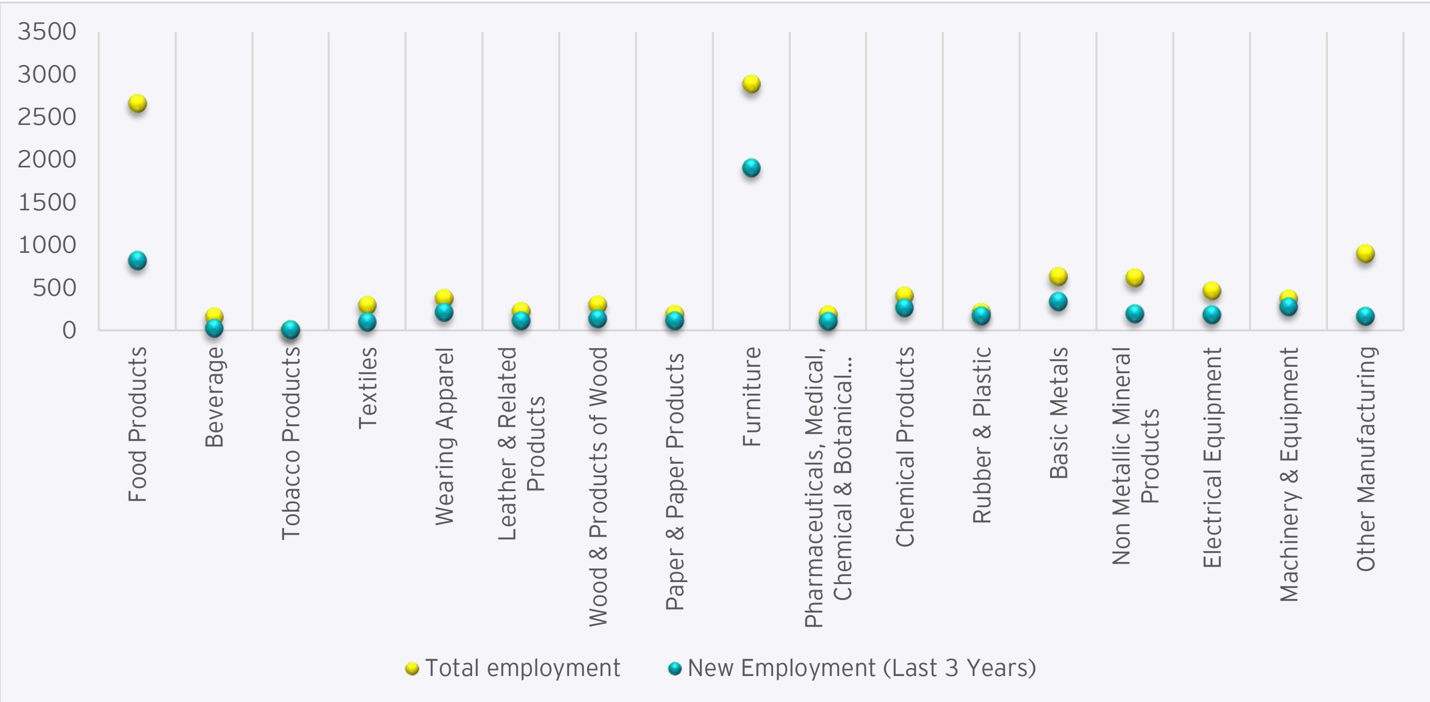


Figure 79: **[Jind]** Total Employment & New employment in last 3 Financial Years (FY'17-FY'19)

Following bar chart showcases category wise per unit employment analysis for MSMEs in Jind.

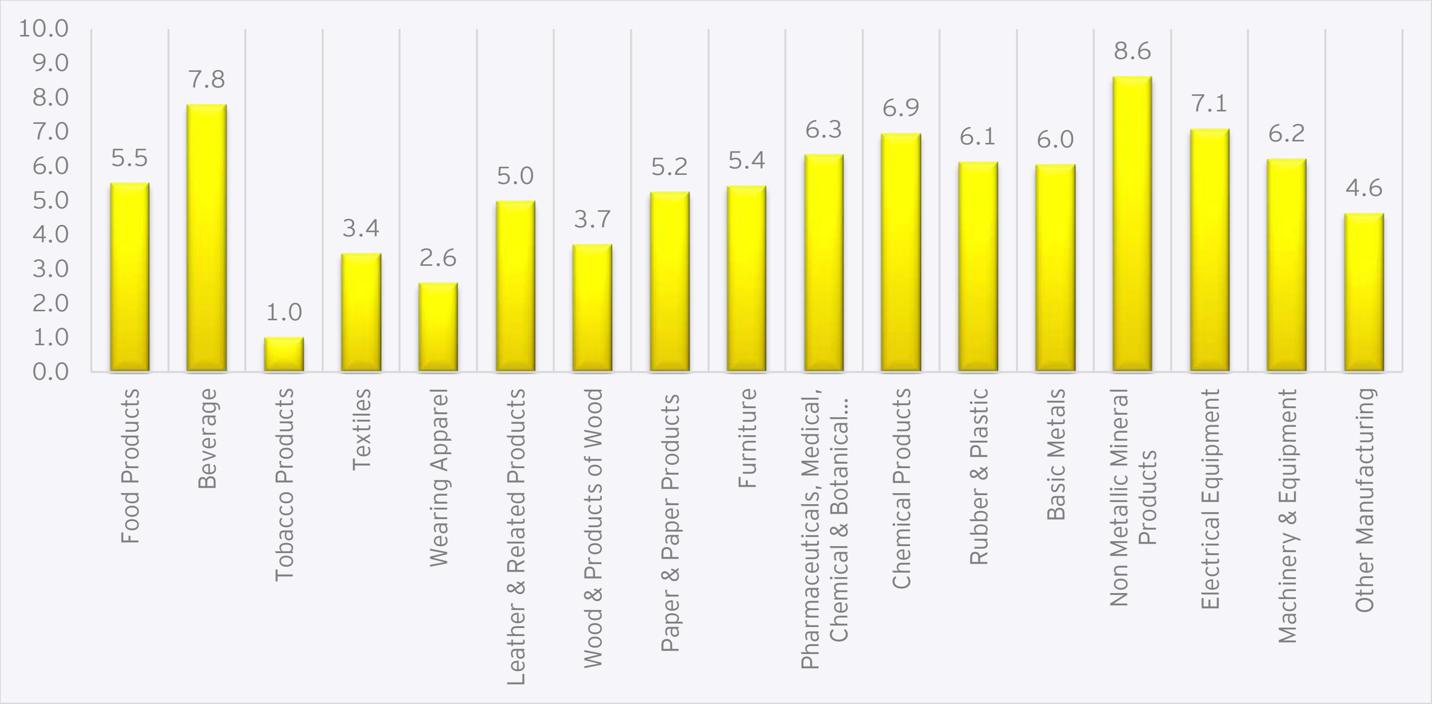


Figure 80: **[Jind]** Category wise employment intensity

Following pie-charts showcase the sectors that have created maximum employment in each of the last 3 financial years.

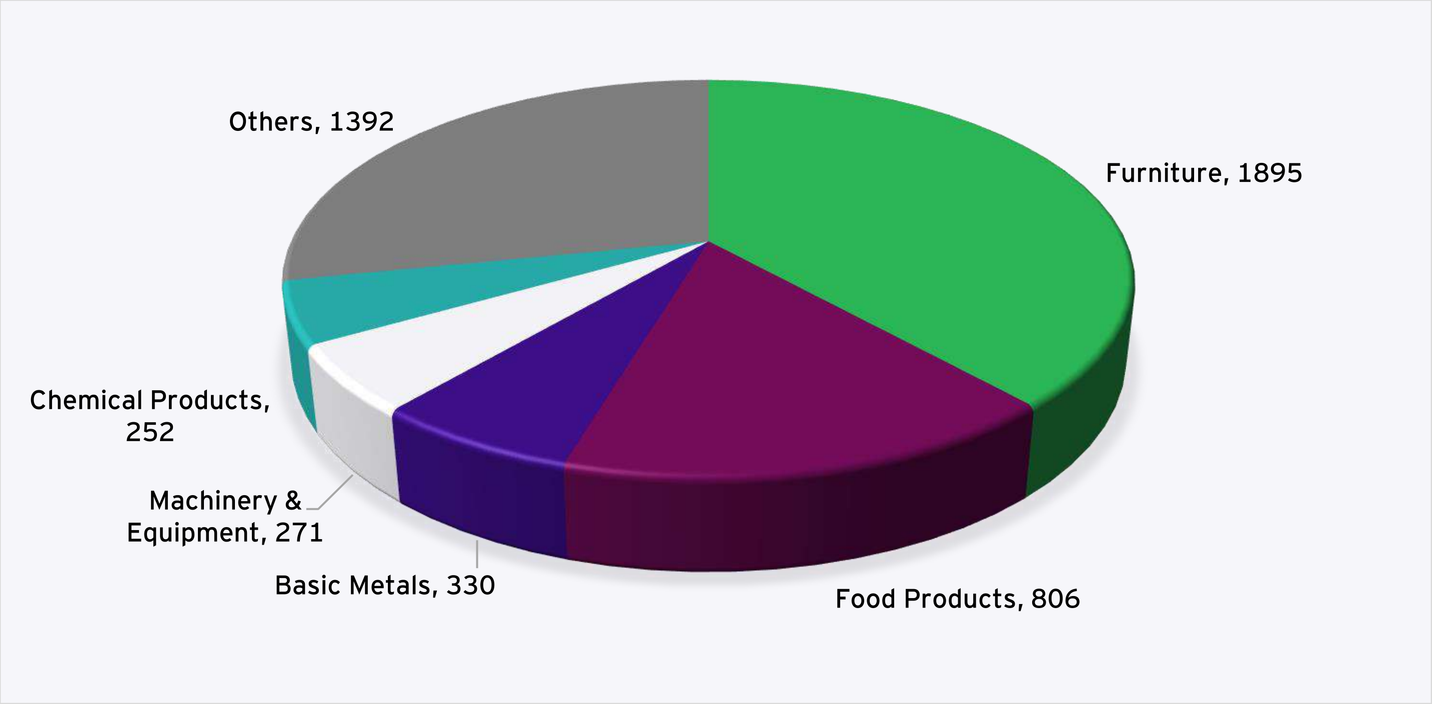


Figure 81: **[Jind]** Top 5 Sectors with maximum new employment in last 3 Financial Years (FY'17-FY'19)

Key Takeaways

- Furniture MSME sector provides the maximum employment (2878) followed by food products sector (2,650) and basic metals sector (622).
- Further, furniture sector has also created the maximum new employment in last 3 years (1,895), followed by food products (806) & basic metals (330).
- Non-metallic mineral sector has maximum employment intensity with an average of 8.6 employees per unit, followed by beverage with 7.8 employees per unit and Pharma at 7.1 employees per unit.
- Tobacco products have the least employment intensity with only 1.0 employees per unit, followed by wearing apparel at 2.6 employees per unit.
- Sectors such as tobacco products, beverages and textiles, have experienced relatively low growth in new employment.

5. EXPORTS FROM THE DISTRICT

Key items of export of district Jind are rice & leather chemicals.

Exports worth **INR 17,501.92 Lakhs** and **INR 12,759.86** were reported from Jind for the year 2017-2018 and 2018-2019, respectively.

(The export figures above represent only exports related information that is available at the District Industries Centre, Jind, and actual exports figure might be significantly higher).

6. NATURAL RESOURCES & RAW MATERIAL AVAILABLE

There is no major or minor river/stream in the district. There are two major canal systems i.e. Western Yamuna Canal and the Bhakhra Canal used for irrigation.

Saltpetre, kankar and stone are primary minerals found in the area.

The district is not very rich in flora and there is no natural forest in Jind. The prominent tree species found in the district are Dhak, Shisham, Kikar, Siris, Neem, Jamun, Badh, Peepal, Gular, Amaltas, Jand, Gulmohar, Aam, Simbal, Lasura, Barna, etc.

Medium soils particularly loam (Bhangar and Nardak) are found in the district.

The major kharif crops of Jind are cotton, sugarcane, paddy and bajra while the minor ones are kharif oilseeds and kharif vegetables.

The major rabi crops of Jind are wheat, gram, barley and oilseeds and minor rabi crops include vegetables and fresh fruits.

7. KEY INDUSTRIAL ESTATES

There are three major industrial areas in Jind district.

Table 79: Key Industrial Estates in Jind

S. No.	Name of Industrial Area	Number of Plots/Sheds
1	HSIIDC Industrial Estate	78
2	Industrial Estate, Narwana	231
3	Udyog Kunj, Shadipur, Julana	86

8. MAJOR LARGE-SCALE UNITS

Apart from MSMEs, there are not many Large & Mega enterprises in Jind. Below table showcases number of Large & Mega enterprises in the district.

Table 80: **[Jind]** Large & Mega Units in each Sector

S. No.	Industry	Number	Names of Large & Mega Units
1	Basic metals	1	• Adinath Forging Private Limited
2	Gypsum Plaster Board	1	• Saint Gobain India Limited

9. SERVICES SECTOR SNAPSHOT

Below table gives snapshot of the services sector in Jind:

Table 81: **[Jind]** Services Sector Snapshot

S. No.	Industry	Total Units	Micro	Small	Medium	Total Investment (INR Lakhs)	Total employment
1	Education	116	109	7	1	1374	659
2	Food and beverage service activities	408	327	80	1	3410	1236
3	Computer programming, consultancy and related activities	105	96	9		475	346
4	Other personal service activities	722	610	112		4717	2002

10. CLUSTERS SCENARIO

Though, currently there are no clusters in Jind district. There is a large presence of Furniture, Food products and Wearing Apparels MSME units.

Potential clusters can be identified within these sectors to further the state's cluster development initiatives.

11. INDUSTRY ASSOCIATIONS

There are three industrial associations in Jind.

Table 82: Industry Associations in Jind

S. No.	Name of Association	Name of President	Address	Contact Number
1	Haryana Chamber of Commerce & Industries	Sh. Suresh Singal, President	C/o Haryana Roller Floor Mills Pvt Ltd., Old Hansi Road, Jind.	09813354570
2	Industrial Association Narwana	Sh. Satpal Datterwal, President	C/o Luxmi Enterprises, Patiala Road, Narwala	09416061520

3	Rice Millers Association	Sh. Subhas Jain, President	Rice Millers Association, Safidon, C/o Aarihand Rice Mills Safidon.	01686262178

12. KEY ISSUES OF THE INDUSTRIES

Some of the key issues impacting industries in Jind are:

- Access to loans and finance is challenging. The processes are long and complex. There is a general lack of awareness amongst industries about the procedures.
- There are significant furniture units in the district. However, due to lack of marketing awareness and use of traditional marketing methods, the units are not able to promote the products.
- Impetus should be given to promotion of exports from the district as currently it is not at par with the district's potential.

13. POTENTIAL AREAS OF INTERVENTION

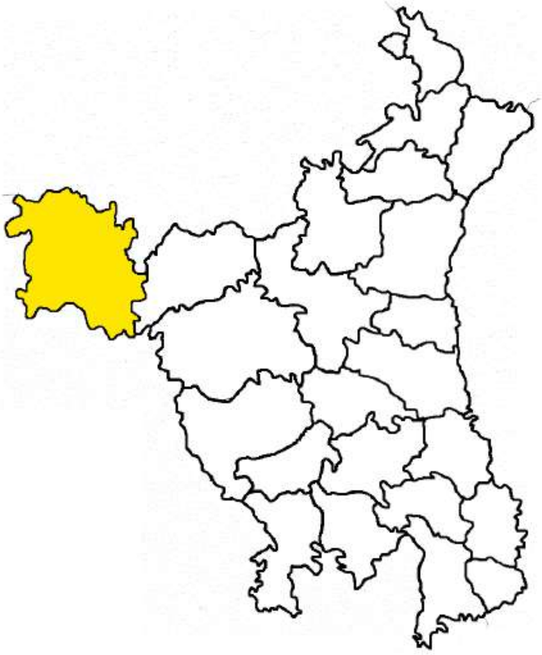
- Industries department can take a lead on highlighting the issues faced by industry regarding access to finance in the State level Bankers Committee and drive discussion/ consultations to devise hassle free mechanism for loans to MSMEs.
- DIC Jind may organize seminars for enterprises in the district on Branding Methodologies, Digital Marketing, Consumer & Trade promotions etc.
- Industry department may also plan workshops across the state to make Haryana MSMEs well versed with business potential in overseas markets & exports related schemes & procedures.

14. POTENTIAL AREAS OF INVESTMENT

- One of the key industries in Jind district is 'Manufacturing of Furniture' with around 530 MSMEs currently operational. There is significant investment potential in organized marketing of furniture products manufactured in the district and expanding their reach pan-India & overseas.
- Food products industry in Jind is also significantly developed with 482 MSMEs, 194 of whom have started operations in last 3 years. The sector offers investment potential in facilities that can supply cost-competitive quality raw materials to these units.

10. Sirsa

District Profile



EXECUTIVE SUMMARY

District Profile

MSME Scenario

10

Sirsa

Famous for....

"Air Coolers Industry"

1 MSMEs in Sirsa

Total number of MSME units	2,014
New MSME units (last 3 years)	1,180

Textile

Food Products

Fabricated Metal

Electrical Equipment

Wooden Products

Top 5 sectors – Maximum number of MSMEs

2 Investment Scenario in Sirsa

Total Investment (INR Lakhs)	41,627
New Investment (last 3 years; INR Lakhs)	20,791

Textile

Food Products

Beverages

Rubber & Plastic Products

Electrical Equipment

Top 5 sectors – Maximum investment by MSMEs

3 Employment Scenario in Sirsa

Total Employment	9,360
New Employment (last 3 years)	4,919

Textile

Food Products

Electrical Equipment

Wooden Products

Paper & paper products

Top 5 sectors – Most employment generated

4 Potential for MSMEs

Food Products industry offers significant investment opportunity towards food technology such as advanced testing facilities, raw materials manufacturing, sales enablement & retailing etc.

Textile sector offers attractive opportunity in setting-up advanced technology facilities enabling activities such as hi-tech design & printing etc.

5 Others

Total Exports (FY 18-19; INR Lakhs)	9,370
Number of Large & Mega units	None
Existing Clusters	3 Mini Clusters

1. INTRODUCTION

The district Sirsa is assumed to have got its name from an ancient Sanskrit name Sairishaka, as mentioned in the Mahabharata, Panini's Ashatadhayayi and the Divyavadan. It is considered as one of the oldest places of North India.

According to another legend, the district's name found its origin from the sacred river Sarasvati, which once flowed near it.

The district came to be a part of Haryana on 1st November 1, 1966. The Sirsa tehsil was bifurcated into two, that is, Sirsa and Dabwali tehsils in 1968. However, three villages of Dabwali tehsil were added to Sirsa tehsil in 1974. Thus, on 1st September, 1975, Sirsa and Dabwali tehsils were combined into a separate Sirsa district with headquarters at Sirsa.

1.1 Geography

The district is situated 255 kms from Delhi and 280 kms from Chandigarh and forms the extreme west corner of Haryana. It is surrounded by Punjab (Faridkot and Bathinda) in north and north-east, Rajasthan (Ganga Nagar district) in the west and south, and Hisar district in the east. Thus, sharing its boundary with two more states.

The district is characterized by an extreme climate, in terms of dryness and temperature, but receives scanty rainfall. The rainfall usually increases from west to east.

Sirsa district's terrain can be broadly classified into three categories, Haryana plain, alluvial bed of Ghaggar or Nali and sand dune tract.

1.2 Demographic Profile

As per the 2011 census, Sirsa's total population is 1,295,189 persons across a geographical area of 4,277 sq. kms. Sirsa district has a population density of 303 persons per sq. km. The population growth rate for Sirsa in the last decade (2001-2011) was 15.99%. Sirsa has a low literacy rate of 68.8%, whereas it was 60.6% during 2001 census. The district's sex ratio is a little over the state average of 877 i.e. 897 females per thousand males, but lower than the national average of 940.

1.3 Administrative Set-up

Sirsa district has four sub-divisions (Sirsa, Dabwali, Ellenabad, Kalanwali), six tehsils (Dabwali, Sirsa, Rania, Ellenabad, Kalanwali, Nathusari Chopta) and one sub-tehsil. Further, it has 7 blocks, 4 towns, 330 villages and 338 village panchayats.

The administrative set-up of Sirsa is headed by the Deputy Commissioner.

Sirsa is covered by 5 Assembly Constituencies, namely Kalawali, Dabwali, Rania, Sirsa and Ellenabad.

The following table shows categorization of blocks as per the status of industrial development.

Table 83: **[Sirsa]** Categorization of Blocks

Block A	Block B	Block C	Block D
		Sirsa	Dabwali
			Rania
			Baragudha
			Ellanabad
			Odhan
			Nathusari Chopta

2. SECTOR WISE MSME LANDSCAPE

Following table shows the total number of MSME units in each sector, in Sirsa, along with the bifurcation of number of micro, small and medium enterprises.

The table also shows number of new units that started their commercial production in the last three financial years.

Table 84: **[Sirsa]** No. of MSME Units in each Sector

S. No.	Industry	Total Units	Micro	Small	Medium	FY' 17	FY'18	FY'19	New Units (Last 3 Years)
Food, Beverages & Tobacco									
1	Food Products	616	558	56	2	81	126	188	395
2	Beverages	19	14	3	2	4	1	7	12
Metals & Mineral Products									
3	Fabricated Metal	61	58	3	0	3	11	13	27
4	Rubber & Plastic products	39	31	7	1	9	7	7	23
Electrical, Electronics & Machinery									
5	Electrical Equipment	78	70	8	0	6	12	26	44
6	Machinery & Equipment	40	38	2	0	3	4	9	16
Leather, Wood & paper									
7	Leather & Related Products	37	36	1	0	4	7	7	18
8	Paper & paper product	26	25	1	0	2	10	9	21
9	Wooden products	58	55	3	0	2	9	11	22
Textiles & Apparel									
10	Textile	88	81	6	1	8	17	17	42

Other Manufacturing									
11	Other Manufacturing	952	915	36	1	116	217	227	560

Following scatter diagram shows the comparison between total units in each sector vis-a-vis new units opened in the last 3 financial years.

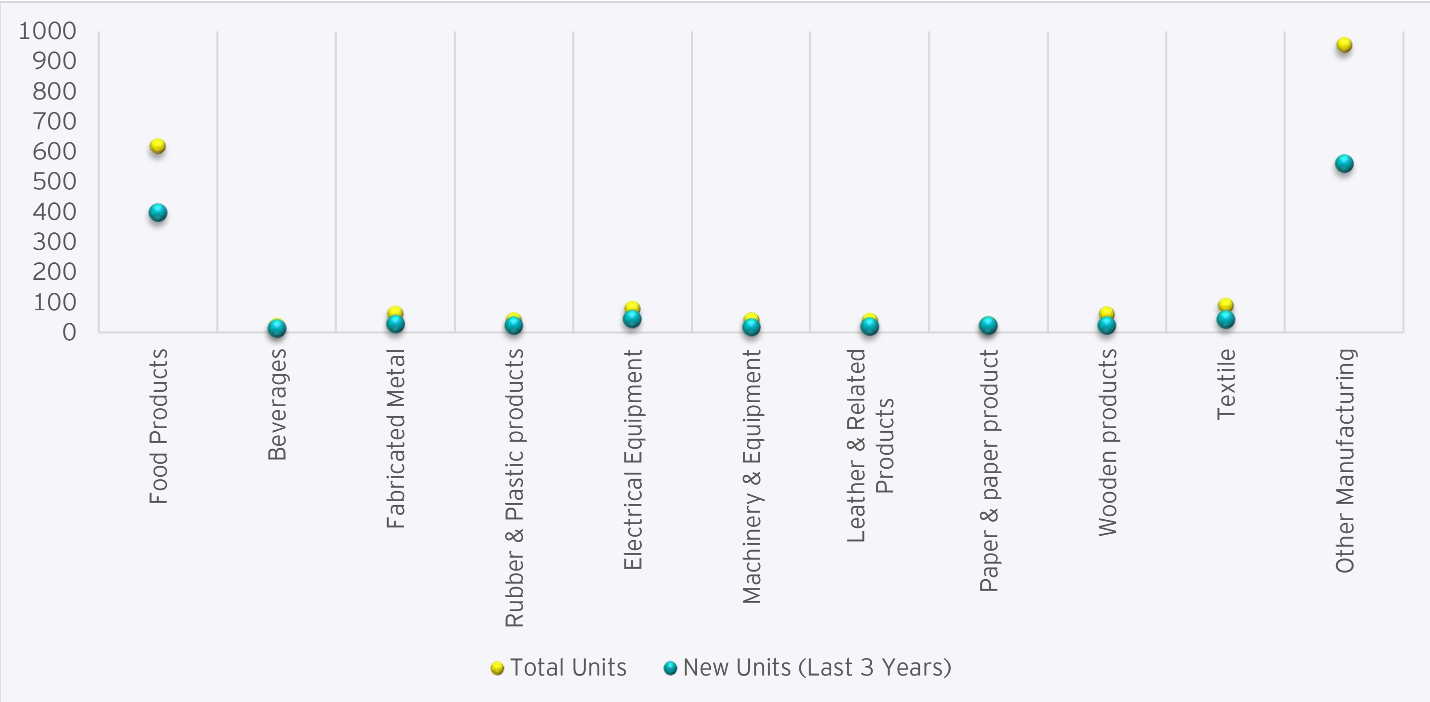


Figure 82: **[Sirsa]** Total Units & New Units in each Sector

2.1 Top 10 Sectors: Based on Number of Units

Following table shows top ten sectors in Sirsa, based upon the total number of MSME units in the district.

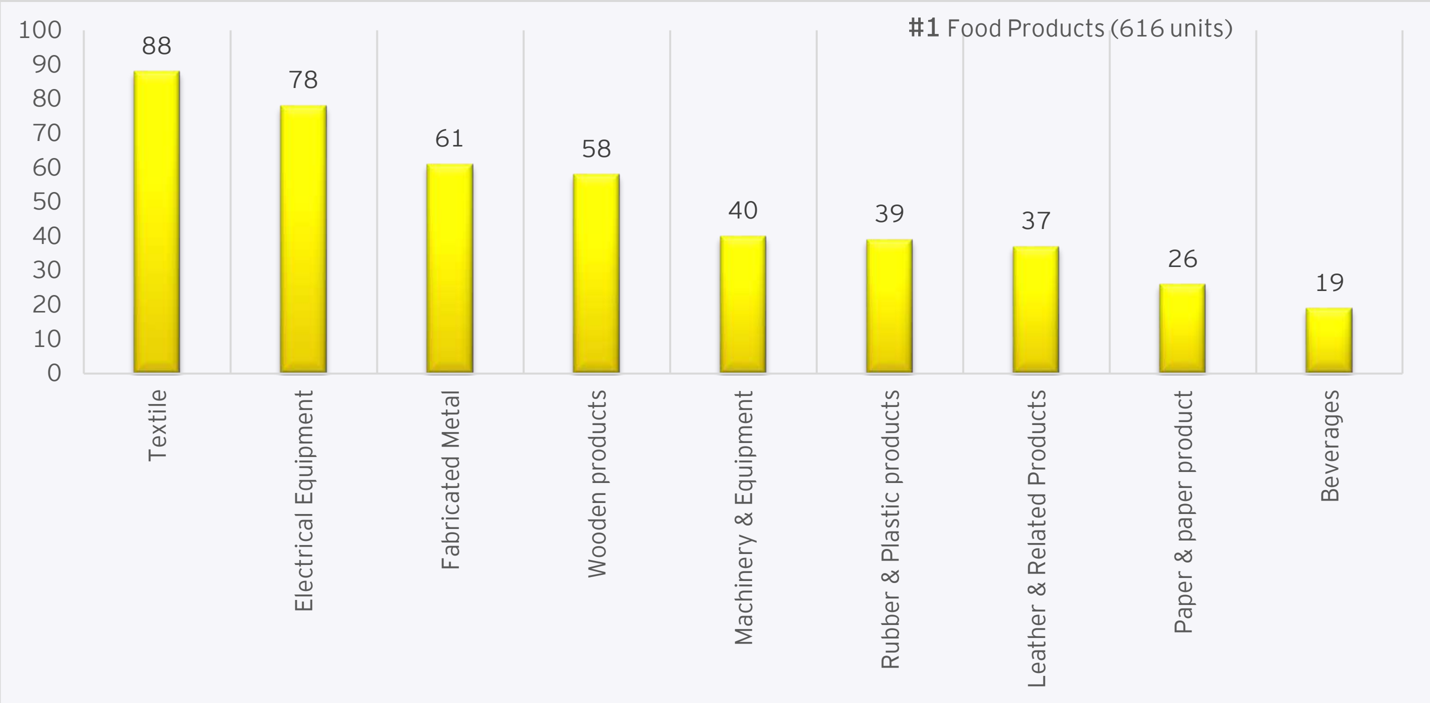


Figure 83: **[Sirsa]** Top 10 sectors - Total No. of MSME Units

2.2 Top 10 Sectors: Based on New Units in Last 3 Years

Following table shows the top ten sectors in Sirsa, based upon number of new MSME units set-up in the last three years.

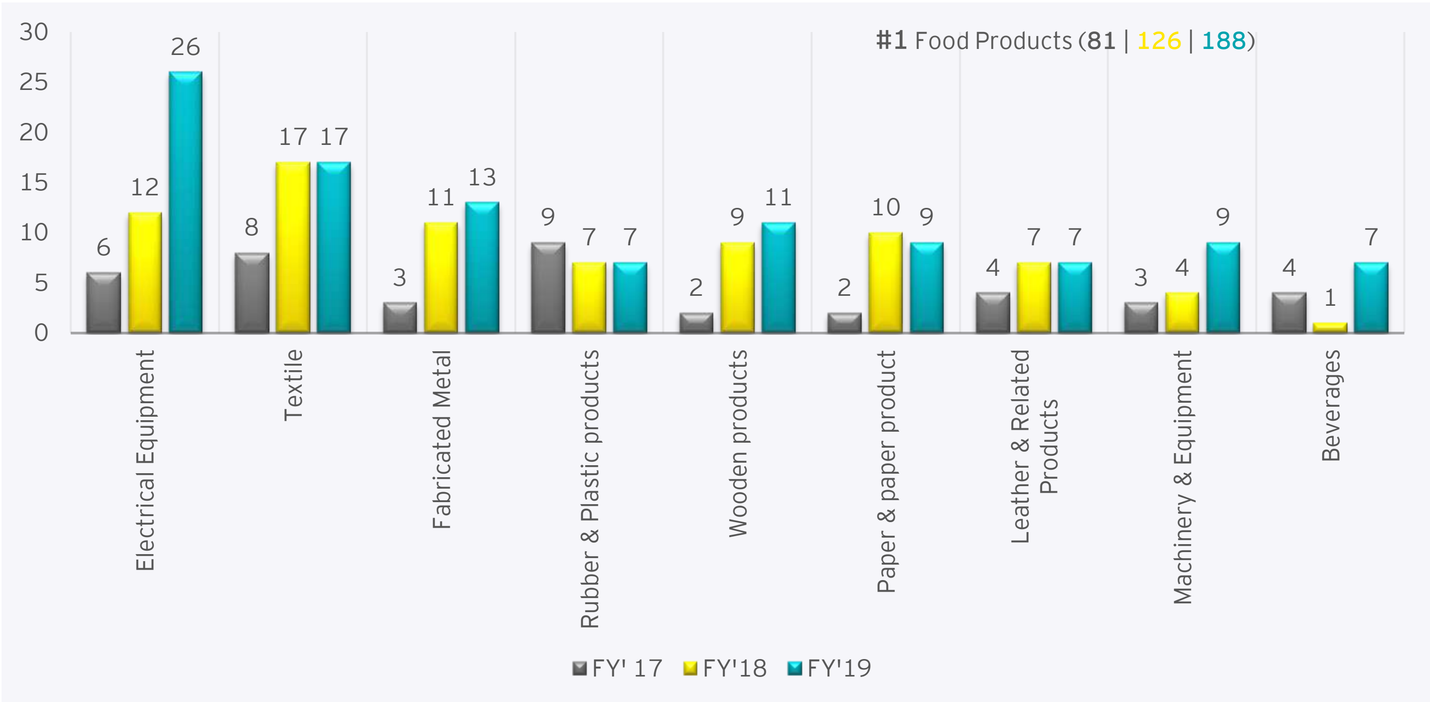


Figure 84: **[Sirsa]** Top 10 Sectors - New Units in Last 3 Years

Key Takeaways

- Maximum number of MSME units in Sirsa are involved in food products sector, followed by textile and electrical equipments.
- In the last three years as well, food products sector has seen maximum number of new MSME units opened (395), followed by electrical equipments (44) and textiles (42).
- In terms of the percentage growth, paper & paper product sector in Sirsa has witnessed good traction, as 81% of the total units have opened-up in the last 3 years, followed by food products sector (64%).

3. SECTOR WISE INVESTMENT SCENARIO

Punjab National Bank is the convener bank of State Level Bankers' Committee (SLBC) in Haryana and also the district lead bank of Sirsa.

Following table shows the total Investment by MSMEs in each sector in Sirsa, along with new investment in the last three financial years (figures are in Lakhs).

Table 85: **[Sirsa]** Total Investment by MSMEs

S. No.	Industry	Investment (INR Lakhs)				
		Total Investment	FY'17	FY'18	FY'19	New Investment (Last 3 Years)
Food, Beverages & Tobacco						
1	Food Products	16130	2496	2464	1986	6946
2	Beverages	1828	440	2	1154	1596
Metals & Mineral Products						
3	Fabricated Metal	711	24	76	70	170
4	Rubber & Plastic products	1982	759	1077	31	1867
Electrical, Electronics & Machinery						
5	Electrical Equipment	1210	310	169	247	726
6	Machinery & Equipment	590	23	58	81	162
Leather, Wood & paper						
7	Leather & Related Products	144	18	17	12	47
8	Paper & paper product	289	33	50	73	156
9	Wooden products	1181	8	494	178	680
Textiles & Apparel						
10	Textile	3930	68	377	1295	1740
Other Manufacturing						

11	Other Manufacturing	13632	1280	3132	2289	6701

Following scatter diagram shows a comparison of total MSME investment and new investment in the last 3 financial years, across different sectors of Sirsa.

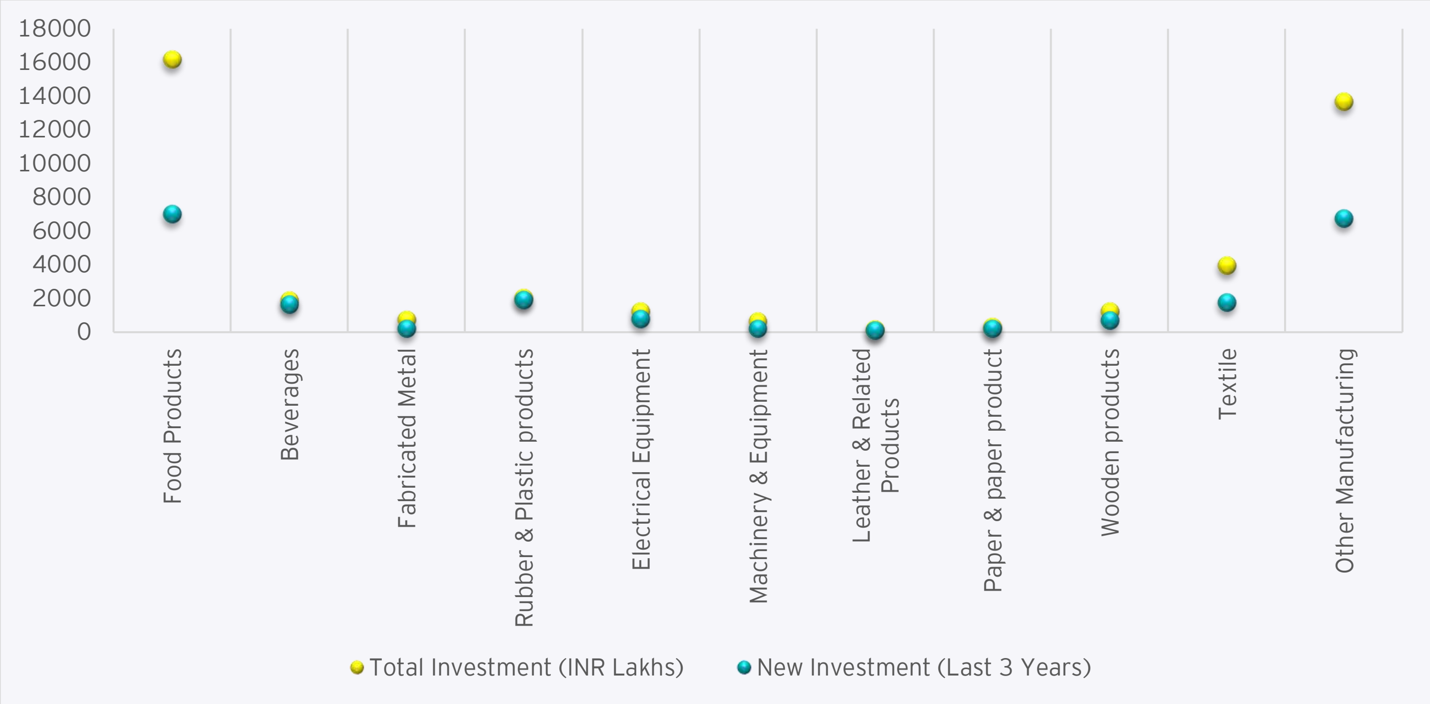


Figure 85: **[Sirsa]** Total Investment & New Investment in Last 3 Financial Years (FY'17-FY'19)

Following pie-chart showcases the sectors that have attracted maximum investments in the last 3 financial years (figures are in Lakhs).

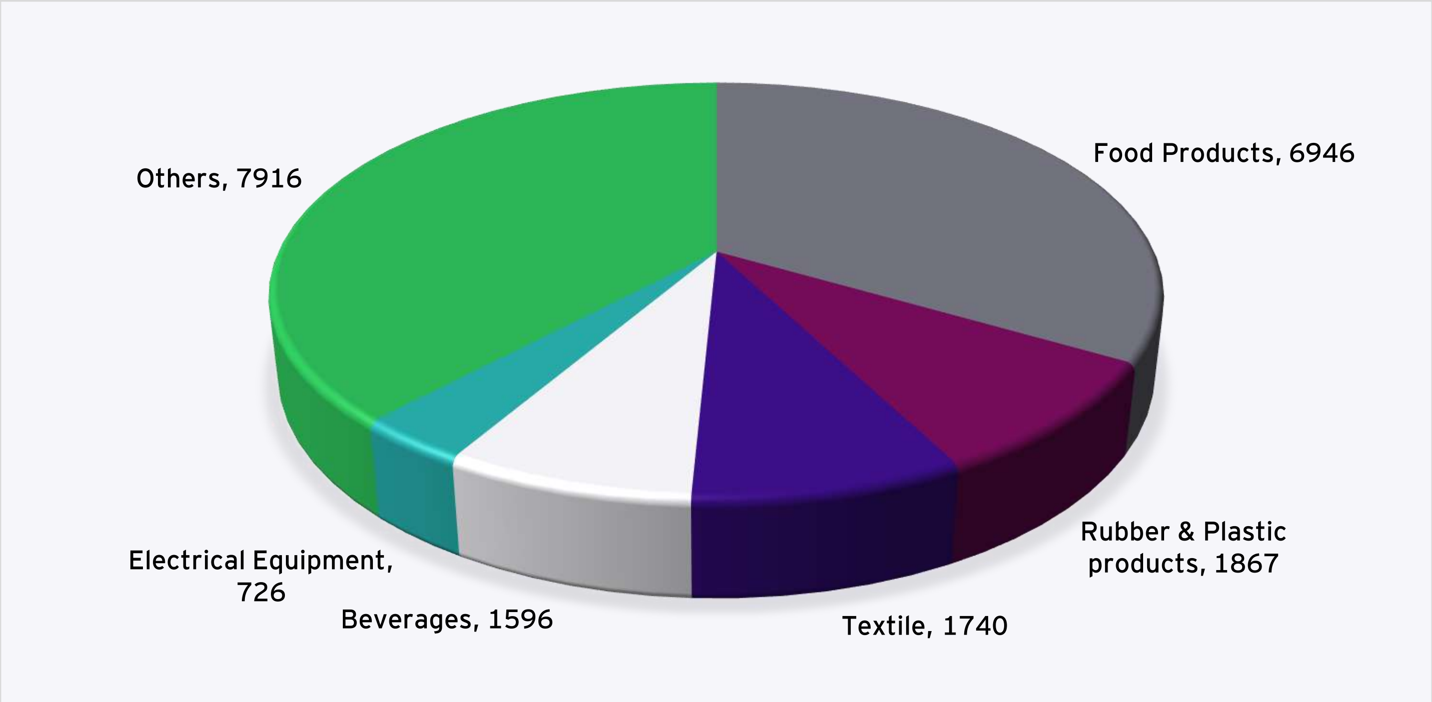


Figure 86: **[Sirsa]** Top 5 Sectors with maximum investment in last 3 Financial Years (FY'17-FY'19)

Following diagram shows a comparison of compound annual growth rate of various sectors for last three financial years.

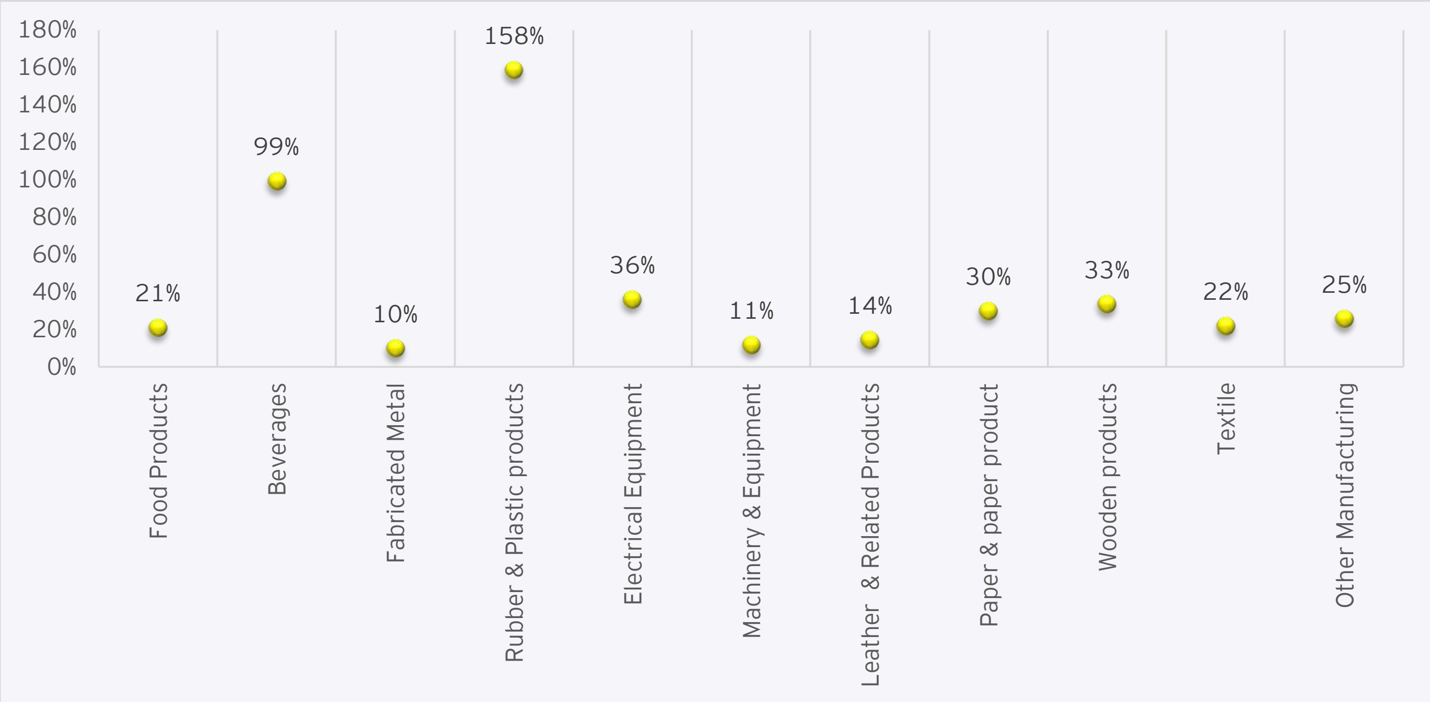


Figure 87: **[Sirsa]** CAGR for Last 3 Financial Years (FY'17-FY'19)

Key Takeaways

- Highest amount of investment by MSMEs in Sirsa has been in food products, (INR 161.30 Cr.), followed by textile sector (INR 39.30 Cr.).
- Besides being the sector with highest total investment food products along with rubber & plastic products sector also attracted maximum investment in the last three financial years (INR 69.46 Cr. and INR 18.67 Cr. respectively).
- Sectors with high CAGR in MSME investments in the last 3 FYs are: rubber & plastic products (158%), beverages (99%), electrical equipment (36%), wooden products (33%) and paper & paper products (30%).

4. SECTOR WISE EMPLOYMENT SCENARIO

Below table showcases the total employment created by MSMEs in each of the sectors, along with new employment created in the last three financial years.

Table 86: **[Sirsa]** Total Employment in each Sector

S. No.	Industry	Total employment	FY'17	FY'18	FY'19	New Employment (Last 3 Years)
Food, Beverages & Tobacco						
1	Food Products	2522	309	394	589	1292
2	Beverages	131	45	3	48	96
Metals & Mineral Products						
3	Fabricated Metal	276	24	47	34	105
4	Rubber & Plastic products	195	71	76	20	167
Electrical, Electronics & Machinery						
5	Electrical Equipment	315	23	66	67	156
6	Machinery & Equipment	218	8	25	24	57
Leather, Wood & paper						
7	Leather & Related Products	98	11	20	18	49
8	Paper & paper product	281	17	142	42	201
9	Wooden products	318	8	113	51	172
Textiles & Apparel						
10	Textile	446	23	61	82	166
Other Manufacturing						
11	Other Manufacturing	4560	472	1099	887	2458

Following scatter diagram shows a comparison of total employment across different MSME sectors and new employment generated in the last 3 financial years.

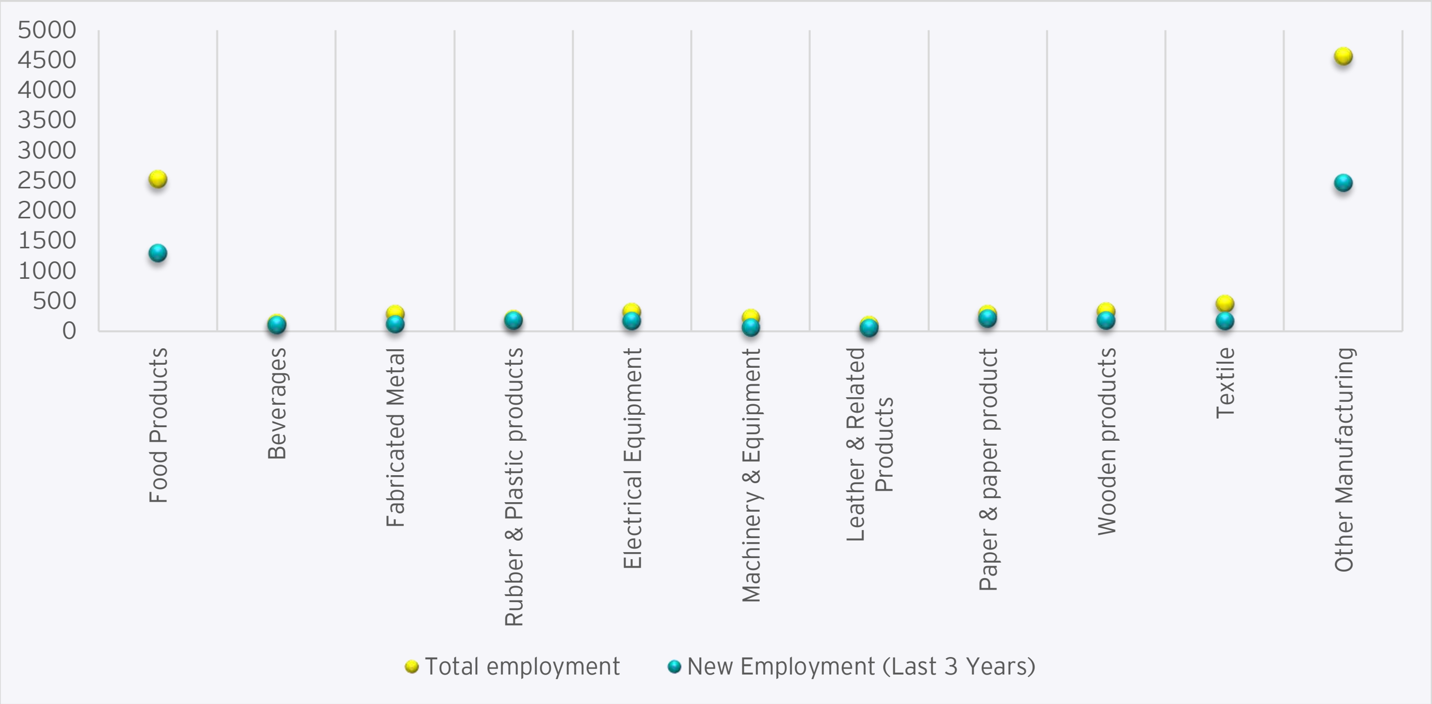


Figure 88: **[Sirsa]** Total Employment & New employment in last 3 Financial Years (FY'17-FY'19)

Following bar chart showcases category wise per unit employment analysis for MSMEs in Sirsa.

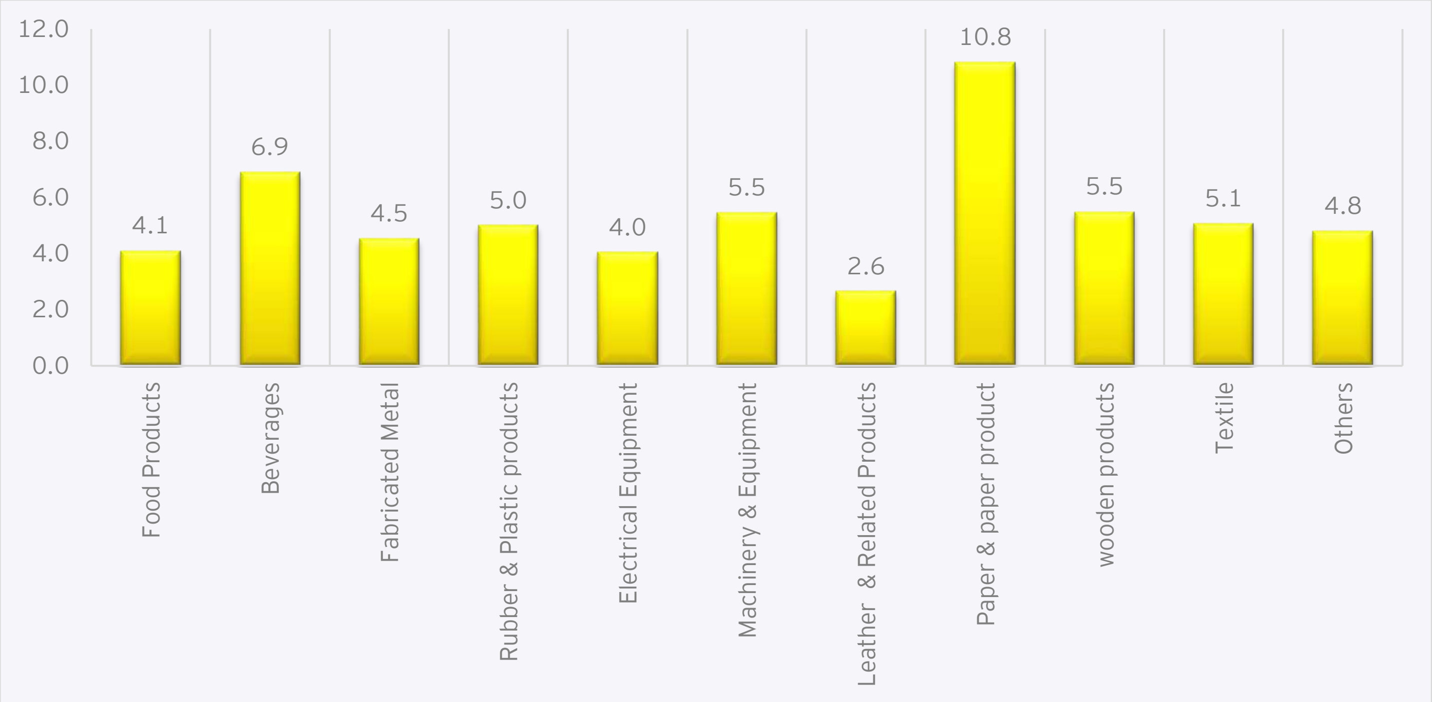


Figure 89: **[Sirsa]** Category wise employment intensity

Following pie-charts showcase the sectors that have created maximum employment in each of the last 3 financial years.

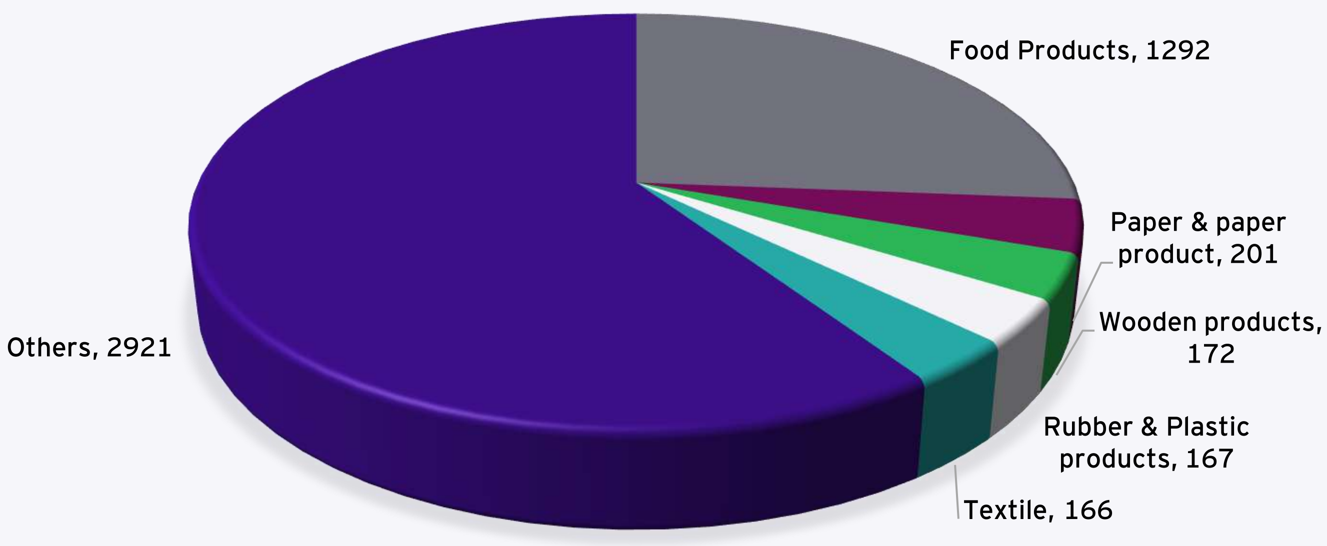


Figure 90: **[Sirsa]** Top 5 Sectors with maximum new employment in last 3 Financial Years (FY'17-FY'19)

Key Takeaways

- Food products MSME sector provides the maximum employment (2522) followed by textile sector (446) and wooden products sector (318).

- Further, food products MSME sector has also created the maximum new employment in last 3 years (1292), followed by paper & paper products (201) & wooden products (172).

- Paper & paper products sector has maximum employment intensity with an average of 10.8 employees per unit, followed by beverage with 6.9 employees per unit and wooden Products at 5.5 employees per unit.

- Tobacco products have the least employment intensity with only 1.0 employees per unit, followed by wearing apparel at 2.6 employees per unit.

- Sectors such as leather & related products and machinery & equipment, have experienced relatively low growth in new employment.

5. EXPORTS FROM THE DISTRICT

Key exports products from Sirsa include rice, cotton, Shella plant and Dryer plant.

Exports worth **INR 5,630.74 Lakhs** and **INR 9,370 Lakhs** were reported for the year 2017-2018 and 2018-2019, respectively from district Sirsa.

(The export data in the table shows only exports related information that is available at the District Industries Centre, Sirsa, and actual exports figure might be significantly higher).

6. NATURAL RESOURCES & RAW MATERIAL AVAILABLE

65% of the area in Sirsa district comprises of Haryana Plain. It is marked by the presence of palaeo channels responsible for sand dunes in this terrain.

Sirsa has a seasonal river Ghaggar, flowing through central parts of the district. Thus, Bhakra canal is the primary source of irrigation in the district.

One of the most valuable timber species of Haryana, Shisham, is majorly found in the Sirsa district. This is due to the primary alluvial soil of the district in conjunction with the long summer growth season, conducive to Shisham.

District Sirsa is composed of alluvium (recent) overlaid with hard rocks. There are three types of soil found in Sirsa, that is, sandy soft loam, silty clay sandy and loam sand.

7. KEY INDUSTRIAL ESTATES

There are three major industrial areas in district Sirsa.

Table 87: Key Industrial Estates in Sirsa

S. No.	Name of Industrial Area	Number of Plots/Sheds
1	IIDC, Sirsa	149
2	Kalanwali Industrial Area	21
3	Dabwali Industrial Area	14

8. SERVICES SECTOR SNAPSHOT

Below table gives snapshot of the services sector in Sirsa:

Table 88: **[Sirsa]** Services Sector Snapshot

S. No.	Industry	Total Units	Micro	Small	Medium	Total Investment (INR Lakhs)	Total employment
1	Civil Engineering	8	4	3	1	546	131
2	Crop and animal production, hunting and related service activities	38	32	6	0	296	82
3	Electricity, gas, steam and air conditioning supply	7	6	1	0	52	27
4	Food and beverage service activities	377	352	25	0	1540	772
5	Insurance, reinsurance and pension funding, except compulsory social security	9	9	0	0	31	16
6	Computer programming, consultancy and related activities	113	107	6	0	427	316
7	Human health activities	88	74	14	0	677	471
8	Information service activities	52	50	2	0	168	116
9	Land transport and transport via pipelines	87	50	37	0	1235	343
10	Legal and accounting activities	69	69	0	0	163	182
11	Construction of building	17	14	3	0	331	121
12	Architecture and engineering activities; technical testing and analysis	22	20	2	0	115	86

13	Warehousing and support activities for transportation	48	22	25	1	1887	482
14	Water collection, treatment and supply	6	5	1	0	30	16
15	Other personal service activities	518	462	56	0	3023	1260

9. CLUSTERS SCENARIO

Sirsa has two mini clusters under implementation, Fabrication cluster and Sheet Metal Fabrication cluster.

Table 89: Mini Clusters in Sirsa

S. No.	Cluster	Cluster Identification	DSR Preparation	DPR Preparation	Implementation
1	Fabrication Cluster	√	√	√	√
2	Sheet Metal Fabrication Cluster	√	√	√	√
3	Sirsa Furniture Cluster	√	√	√	

District Sirsa is known as "the cotton belt of Haryana". Also, the main resource of the Sirsa is agro products. Given the large presence of food products and Textile MSME units in the district, there is a potential for new cluster development in these industries.

10. INDUSTRY ASSOCIATIONS

There are seven Industrial Associations in Sirsa.

Table 90: Industry Associations in Sirsa

S. No.	Name of Association	Name of President	Address	Contact Number
1	Industrial Association	Sh. Yudhistar Gupta, President	HSIIDC, Sirsa	9354856965
2	Cotton Mills Association	Sh. Tajinder Kumar Mittal, President	Shiv Cotton Factory, Near ITI, OPP, Peer, Mandir Indl Area III, Near Ashok Dharam Kanta, Sirsa	9812031146
3	Rice millers Associations	Sh. Bhim Singla, President	Shri Ganesh Rice Mill, Indl. Area, Dabwali, Road Side, Sirsa	9812027139
4	Sirsa Industrial Area-111, Association	Sh. Suresh Kumar Goyal, General Secretary	Near Peer Baba Mandir, Sirsa	9896348262
5	Sirsa MSME Chamber of Commerce and Industries	Sh. Raj Kumar, President	DGM Building, Old Court Road, Near Railway Crossing,Sirsa	9896966666 9050902425
6	The Haryana Cotton Ginning Association	Sh. Sushil Mittal	Aditya Agro Industries, Dabwali Road, Phatak crossed, Civil Hospital, Sirsa	9215049853
7	Jagdambe Hosiery Welfare Association	Sh. Bhagirath	Village Darbi, Sirsa	9467255199 9416305089

11. KEY ISSUES OF THE INDUSTRIES

Some of the key issues, challenges faced by the industries of Sirsa have been highlighted below:

- The power supply in the district is irregular and insufficient. The power tariff is on the higher side, compared to other regions. There are frequent voltage fluctuations and power cuts that are causing thermal shocks to the plant and machinery of the enterprise. Some big industries are forced to slow down their production or move their units to other areas, outside the district, to overcome shortage of electric power.
- There are some industries operating in non-conforming zone. Industrial associations

have raised demands for organized industrial estates to move these industries. However, no land has been earmarked by the state government for SMEs in the con-conforming zone.

- Some other prominent issues are:

  - Lack of testing facilities in the district
  - Inadequate or lack of market information
  - Lack of access to finance. There is a lack of awareness as well as the procedures to procure bank loans are long and complex.
  - Slow technology up-gradation
  - Lack of innovation and cooperation due to weak industries-academia linkages
  - Lack of skill development and training leading to lower level of labour productivity
  - Poor road infrastructure

12. POTENTIAL AREAS OF INTERVENTION

- Representatives of Industries Department, HSIIDC, Power distributor can collaborate to devise a grievance redressal mechanism to address all power related issues.
- HSIIDC may conduct due diligence on the potential sites to set-up an industrial area in Sirsa, to move the industries currently operating in non-confirming zones.
- DIC Sirsa may facilitate closer collaboration between local technical institutes and industry and organize seminars for the industry on state & govt. incentives schemes, new age manufacturing & marketing practices etc.

13. POTENTIAL AREAS OF INVESTMENT

- 'Food Products' is the key industry in Sirsa with 616 units in total offering significant investment opportunity towards food technology such as advanced testing facilities, raw materials manufacturing, sales enablement & retailing etc.
- Textile is also a small but fast-growing sector in Sirsa with 88 units in total and 42 new units in last three financial years. The sector offers attractive opportunity in setting-up advanced technology facilities enabling activities such as hi-tech design & printing etc.

11. Hisar

District Profile

EXECUTIVE SUMMARY

District Profile

MSME Scenario

11

Hisar

Famous for....

"Drawing Wires Industry"

1 MSMEs in Hisar

Total number of MSME units **1,879**

New MSME units (last 3 years) **772**

Wearing Apparel

Food Products

Leather Products

Chemicals & Chemical Products

Non-metallic products

Top 5 sectors – Maximum number of MSMEs

2 Investment Scenario in Hisar

Total Investment (INR Lakhs) **16,532**

New Investment (last 3 years; INR Lakhs) **10,223**

Basic Metals

Food Products

Non-metallic products

Rubber & Plastic Products

Textiles

Top 5 sectors – Maximum investment by MSMEs

3 Employment Scenario in Hisar

Total Employment **5,498**

New Employment (last 3 years) **3,900**

Non-metallic products

Food Products

Computer & Electronics

Basic Metals

Electrical Equipment

Top 5 sectors – Most employment generated

4 Potential for MSMEs

Food products sector offers significant investment opportunity in the upstream food processing value chain facilities which can supply raw materials to existing units

Hisar also has significantly developed Chemical products & Leather products industry, offering opportunities for investment towards allied facilities in these sectors

5 Others

Total Exports (FY18-19; INR Lakhs) **1,84,564**

Number of Large & Mega units **1**

Existing Clusters **1 Mini Cluster**

1. INTRODUCTION

Known as the Steel City, Hisar is one the oldest districts in Haryana. The name Hisar in Arabic means 'Fort'. It was founded by Feroz Shah Tuglak in 1354 as a fort with four very popular gates, namely Nagori gate, Mori gate, Delhi gate & Talaqui gate.

Since the last few decades, it has particularly gained recognition in the domain of education and research. Some of the prominent ones being Haryana Agricultural University, Guru Jambheshwar University of Science & Technology etc.

1.1 Geography

Hisar is an important part of western Haryana, and is surrounded by district Fatehabad in North, Jind and Rohtak in the east, district Bhiwani in the south and Rajasthan in the west.

The district accounts for 11% geographical area of the state of Haryana.

Since the district shares its boundary with Rajasthan on the west, Thar desert can be seen starting from south western side. Towards its north eastern sides, vast river plain (comprising of Ghaggar, Yamuna and Ganga) can be found. The district is located on the outer margins of the south-western monsoon region, thus has a tropical monsoon climate. Approximately 75%-80% of the annual rainfall is received during the months of June-September.

1.2 Demographic Profile

As per the 2011 census, Hisar's total population is 1,743,931 persons across a geographical area of 3,983 sq. kms, and is ranked 276th in India out of a total of 640 districts. Hisar district has a population density of 438 persons per sq. km. The population growth rate for Hisar in the last decade (2001-2011) was 13.45%. Hisar has a moderate literacy rate of 72.89%. The district's sex ratio is lower than the state average and national average of 879 and 940, respectively, i.e. 872 females per thousand males.

1.3 Administrative Set-up

Hisar district presently has six tehsils (Hisar, Hansi, Narnaund, Barwala, Bass and Adampur), further supported by 3 sub-tehsils (Balsamand, Uklana and Kheri Jalab).

Hisar has seven Vidhan Sabha constituencies, that is Adampur, Uklana, Narnaund, Hansi, Barwala, Hisar and Nalwa.

The district is also the divisional headquarter of the Divisional Commissioner and Police Range.

The following table shows categorization of blocks as per the status of industrial development.

Table 91: **[Hisar]** Categorization of Blocks

Block A	Block B	Block C	Block D
	Hisar-I	Hansi-I	Adampur
	Hisar-II	Hansi-II	Barwala
			Narnaud
			Uklana
			Agroha

2. SECTOR WISE MSME LANDSCAPE

Following table shows the total number of MSME units in each sector, in Hisar, along with the bifurcation of number of micro, small and medium enterprises.

The table also shows number of new units that started their commercial production in the last three financial years.

Table 92: **[Hisar]** No. of MSME Units in each Sector

S. No.	Industry	Total Units	Micro	Small	Medium	FY' 17	FY'18	FY'19	New Units (Last 3 Years)
Metals & Mineral Products									
1	Basic Metals	56	36	18	2	4	13	26	43
Food, Beverages & Tobacco									
2	Beverages	11	9	2	0	1	3	5	9
3	Food Products	548	512	36	1	33	120	48	201
Pharma, Petro-Chemicals, Rubber products									
4	Chemical & Chemical Products	122	115	7	0	3	2	11	16
5	Pharmaceuticals	34	33	1	0	17	5	7	29
6	Rubber & Plastic Products	51	37	14	0	6	13	14	33
7	Coke & refined products	37	35	2	0	4	6	10	20
Electrical, Electronics & Machinery									
8	Computer & electronics	58	56	2	0	2	30	12	44

9	Electrical equipment	55	53	2	0	8	14	4	26
10	Machinery & equipment	34	32	2	0	1	6	3	10
Metals & Mineral Products									
11	Fabricated Metal Products	39	30	9	0	2	6	9	17
Leather, Wood & Paper									
12	Furniture	40	39	1	0	4	7	8	19
13	Leather Products	116	116	0	0	8	10	5	23
14	Paper & Paper Products	32	17	15	0	6	5	11	22
15	Wood Products	49	42	7	0	3	14	11	28
Automotive & Auto-Components									
16	Motor Vehicles	35	35	0	0	3	4	3	10
17	Other transport equipment	9	8	1	0	0	4	2	6
Metals & Mineral Products									
18	Non-metallic Products	88	86	1	1	7	39	19	65
Textiles & Apparel									
19	Textiles	56	50	6	0	1	16	11	28
20	Wearing Apparel	194	194	0	0	8	69	37	114
Other Manufacturing									
21	Other Manufacturing	215	192	23	0	2	4	3	9

Following scatter diagram shows the comparison between total units in each sector vis-a-vis new units opened in the last 3 financial years.

Figure 91: **[Hisar]** Total Units & New Units in each Sector

2.1 Top 10 Sectors: Based on Number of Units

Following table shows top ten sectors in Hisar, based upon the total number of MSME units in the district.

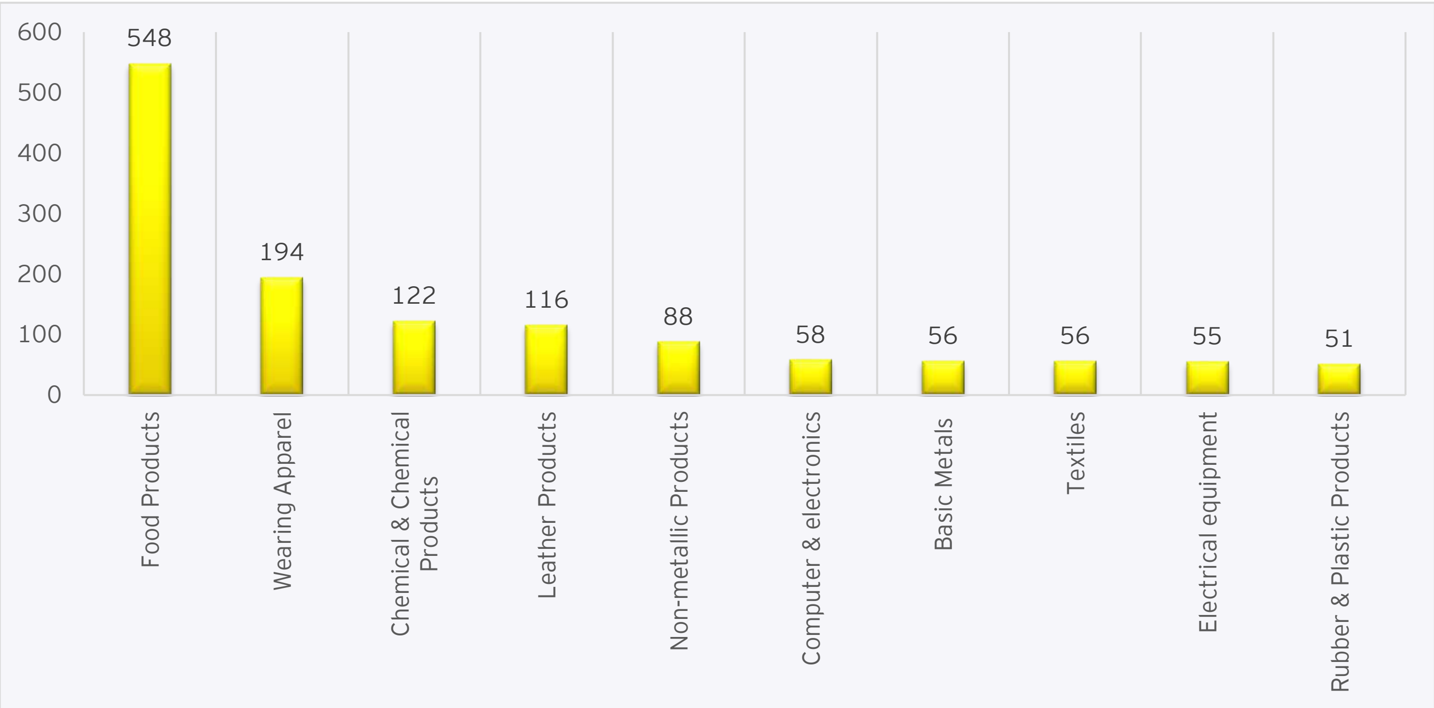


Figure 92: **[Hisar]** Top 10 sectors - Total No. of MSME Units

2.2 Top 10 Sectors: Based on New Units in Last 3 Years

Following table shows the top ten sectors in Hisar, based upon number of new MSME units set-up in the last three years.

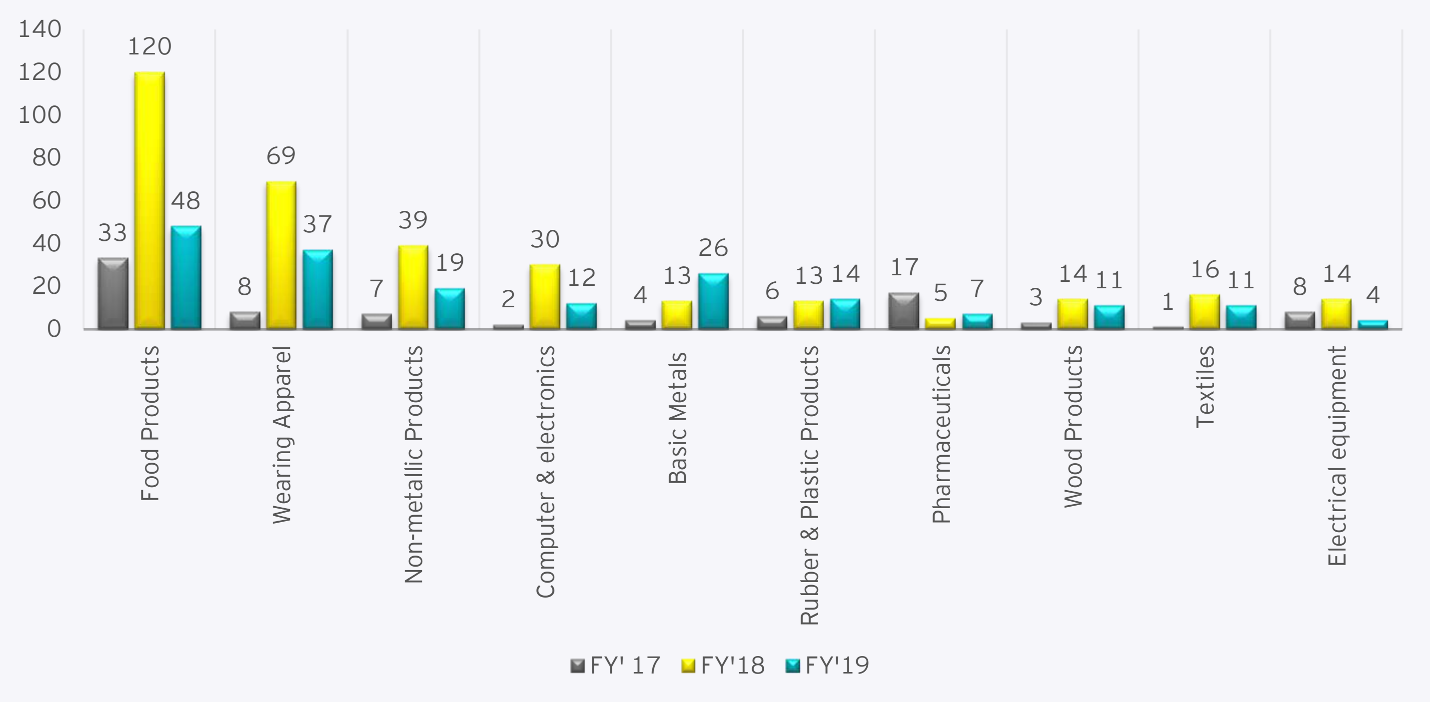


Figure 93: **[Hisar]** Top 10 Sectors - New Units in Last 3 Years

Key Takeaways

- Maximum number of MSME units in Hisar are involved in the food products sector, followed by wearing apparels.
- In the last three years as well, food products sector has seen maximum number of new MSME units opened (201), followed by apparels (114) and non-metallic products (65).
- In terms of the percentage growth, pharmaceuticals sector has experienced an impressive recent growth with 85% of the total units having opened up in the last 3 years, followed by beverages.

3. SECTOR WISE INVESTMENT SCENARIO

Punjab National Bank is the convener bank of State Level Bankers' Committee (SLBC) in Haryana and also the district lead bank of Hisar.

Following table shows the total Investment by MSMEs in each sector in Hisar, along with new investment in the last three financial years (figures are in Lakhs).

Table 93: **[Hisar]** Total Investment by MSMEs

S. No.	Industry	Investment (INR Lakhs)				
		Total Investment	FY'17	FY'18	FY'19	New Investment (Last 3 Years)
Metals & Mineral Products						
1	Basic Metals	2704	338	360	278	976
Food, Beverages & Tobacco						
2	Beverages	224	20	59	39	118
3	Food Products	5200	840	2087	718	3645
Pharma, Petro-Chemicals, Rubber products						
4	Chemical & Chemical Products	104	22	20	56	98
5	Pharmaceuticals	220	38	87	87	212
6	Rubber & Plastic Products	1799	951	168	98	1217
7	Coke & refined products	228	42	116	42	200
Electrical, Electronics & Machinery						
8	Computer & electronics	249	15	56	77	148
9	Electrical equipment	291	70	139	47	256
10	Machinery & equipment	56	2	23	19	44
Metals & Mineral Products						
11	Fabricated Metal Products	155	22	63	52	137
Leather, Wood & Paper						
12	Furniture	146	32	38	57	127
13	Leather Products	195	71	52	21	144
14	Paper & Paper Products	278	174	45	38	257
15	Wood Products	204	22	112	27	161
Automotive & Auto-Components						
16	Motor Vehicles	146	16	20	51	87
17	Other transport equipment	57	0	14	6	20
Metals & Mineral Products						

18	Non-metallic Products	1321	92	639	303	1034
Textiles & Apparel						
19	Textiles	660	2	130	87	219
20	Wearing Apparel	329	56	118	142	316
Other Manufacturing						
21	Other Manufacturing	1966	250	325	232	807

Following scatter diagram shows a comparison of total MSME investment and new investment in the last 3 financial years, across different sectors of Hisar.

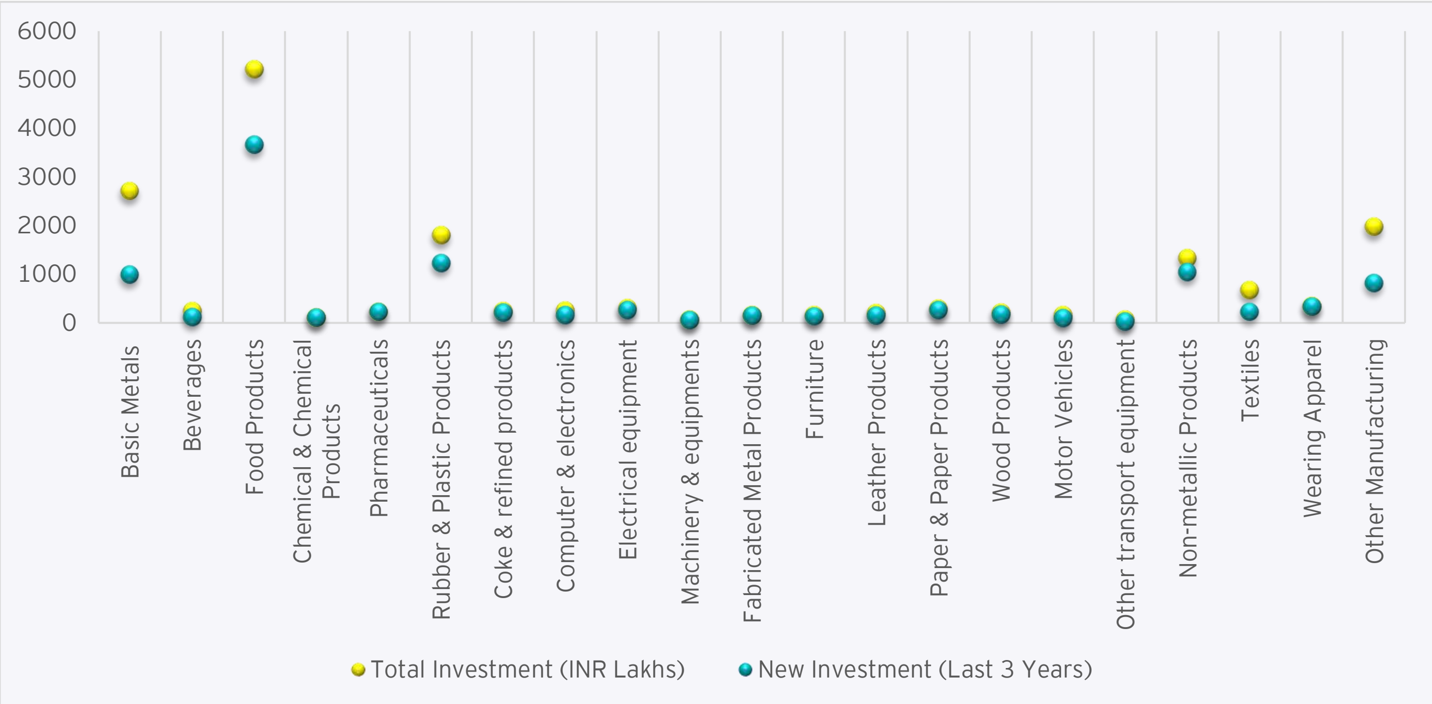


Figure 94: **[Hisar]** Total Investment & New Investment in Last 3 Financial Years (FY'17-FY'19)

Following pie-chart showcases the sectors that have attracted maximum investments in the last 3 financial years (figures are in Lakhs).

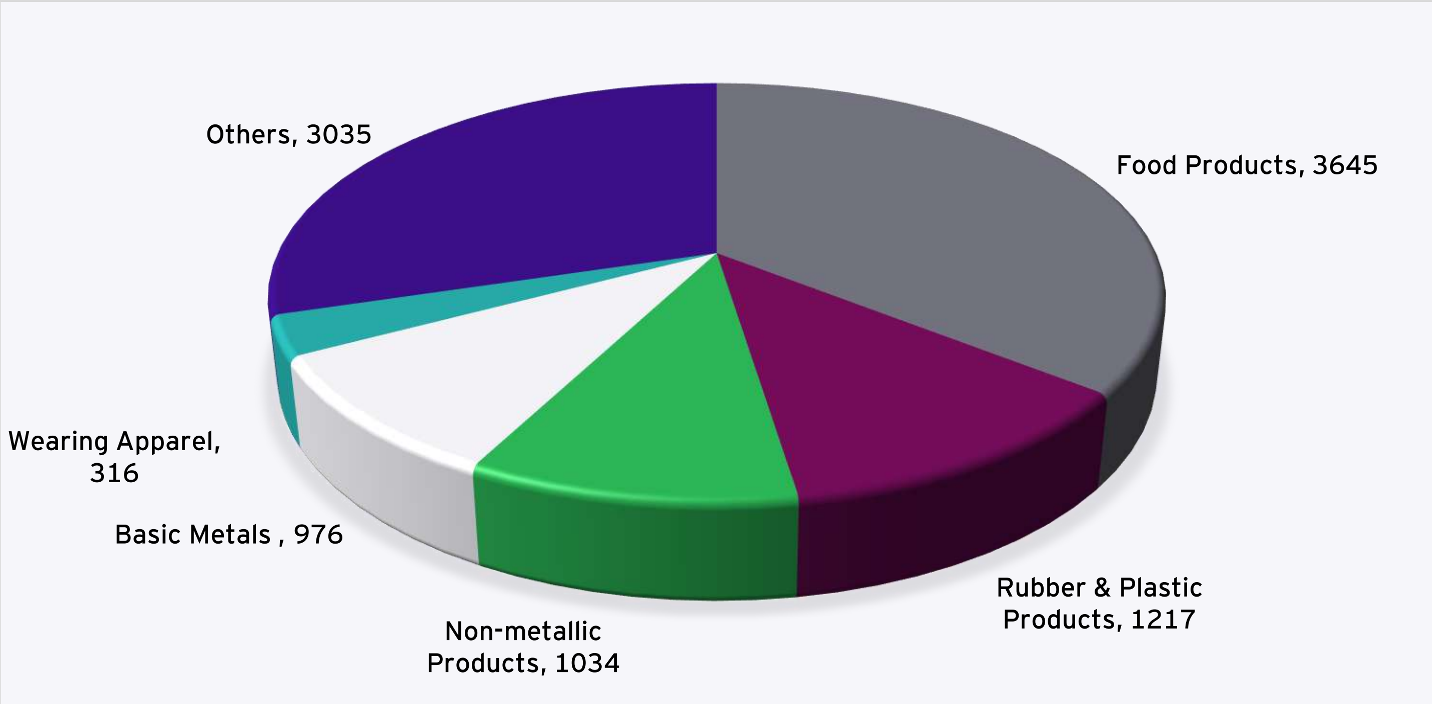


Figure 95: **[Hisar]** Top 5 Sectors with maximum investment in last 3 Financial Years (FY'17-FY'19)

Following diagram shows a comparison of compound annual growth rate of various sectors for last three financial years.

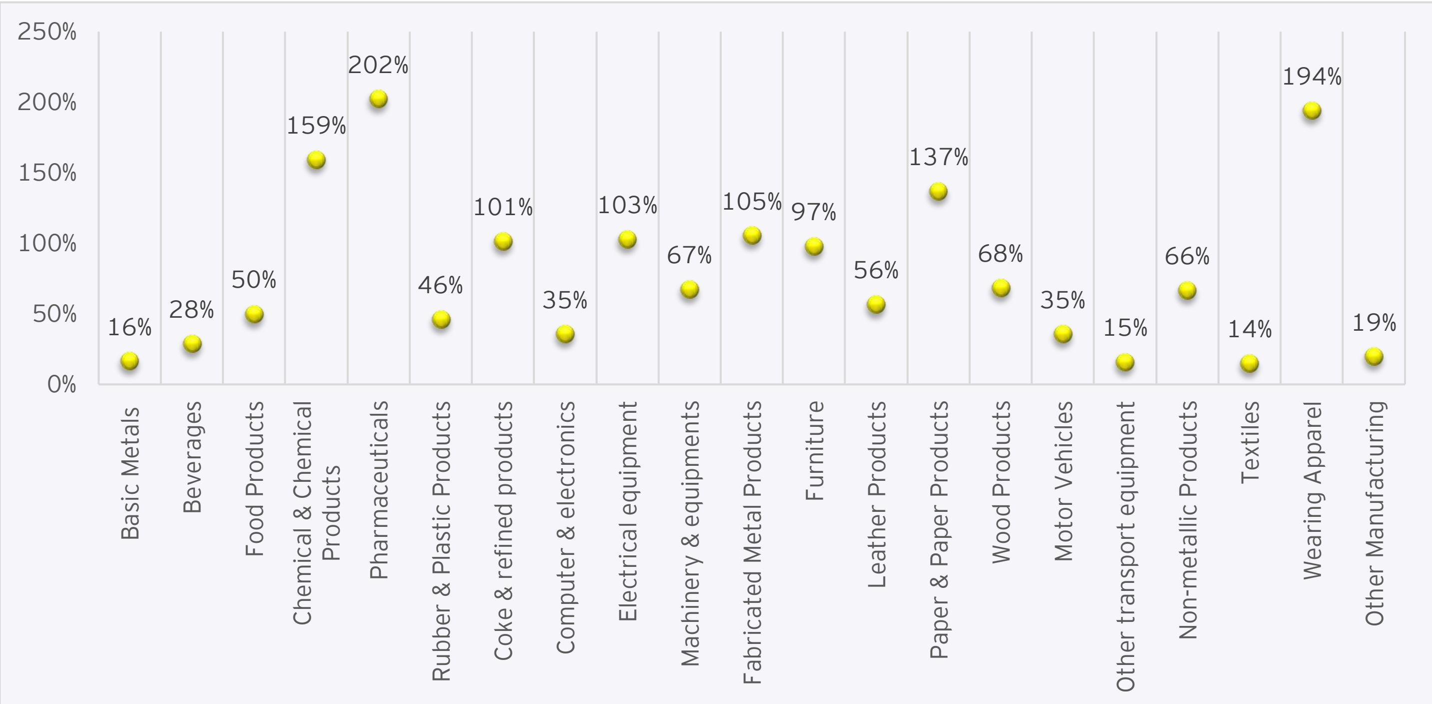


Figure 96: **[Hisar]** CAGR for Last 3 Financial Years (FY'17-FY'19)

Key Takeaways

- Highest amount of investment by MSMEs in Hisar has been in food products sector (INR 52.00 Cr.), followed by basic metals sector (INR 27.04 Cr.).
- Besides being the sectors with highest total investment, food products sector also attracted maximum investment in the last three financial years (INR 36.45 Cr. followed by rubber and plastic products (INR 12.17 Cr.).
- Sectors with high CAGR in MSME investments in the last 3 FYs are: pharmaceuticals (202%), wearing apparels (194%), chemical & chemical products (159%), paper & paper products (137%) and fabricated metal products (105%).

4. SECTOR WISE EMPLOYMENT SCENARIO

Below table showcases the total employment created by MSMEs in each of the sectors, along with new employment created in the last three financial years.

Table 94: **[Hisar]** Total Employment in each Sector

S. No.	Industry	Total employment	FY'17	FY'18	FY'19	New Employment (Last 3 Years)
Metals & Mineral Products						
1	Basic Metals	450	52	84	112	248
Food, Beverages & Tobacco						
2	Beverages	84	10	37	21	68
3	Food Products	1526	203	614	195	1012
Pharma, Petro-Chemicals, Rubber products						
4	Chemical & Chemical Products	82	13	10	47	70
5	Pharmaceuticals	128	11	17	35	63
6	Rubber & Plastic Products	256	52	50	49	151
7	Coke & refined products	173	55	76	42	173
Electrical, Electronics & Machinery						
8	Computer & electronics	355	156	64	38	258
9	Electrical equipment	296	63	112	11	186
10	Machinery & equipment	165	9	142	5	156

Metals & Mineral Products						
11	Fabricated Metal Products	81	7	27	38	72
Leather, Wood & Paper						
12	Furniture	69	12	16	33	61
13	Leather Products	154	66	43	13	122
14	Paper & Paper Products	168	65	36	24	125
15	Wood Products	156	45	69	42	156
Automotive & Auto-Components						
16	Motor Vehicles	109	6	5	21	32
17	Other transport equipment	32	0	6	7	13
Metals & Mineral Products						
18	Non-metallic Products	465	51	332	74	457
Textiles & Apparel						
19	Textiles	201	3	52	45	100
20	Wearing Apparel	293	29	129	125	283
Other Manufacturing						
21	Other Manufacturing	255	8	41	45	94

Following scatter diagram shows a comparison of total employment across different MSME sectors and new employment generated in the last 3 financial years.

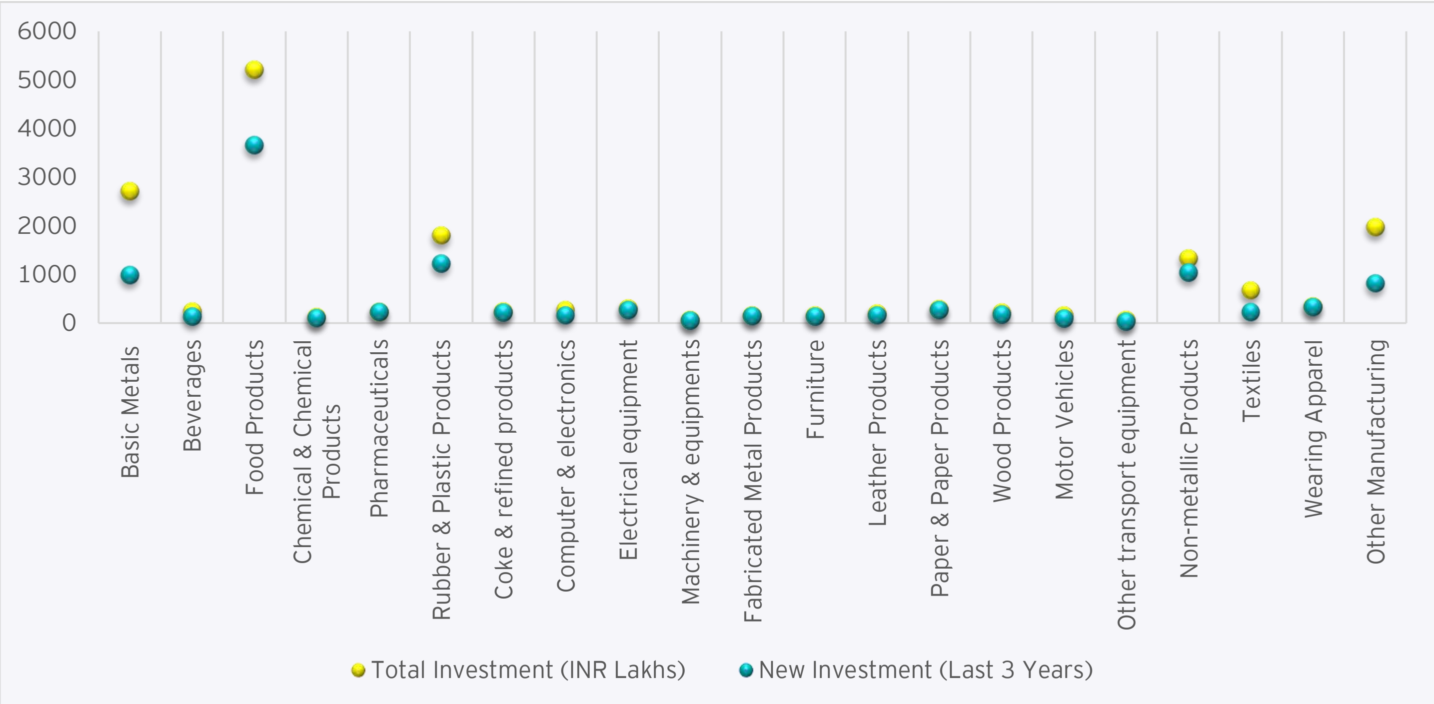


Figure 97: **[Hisar]** Total Employment & New employment in last 3 Financial Years (FY'17-FY'19)

Following bar chart showcases category wise per unit employment analysis for MSMEs in Hisar.

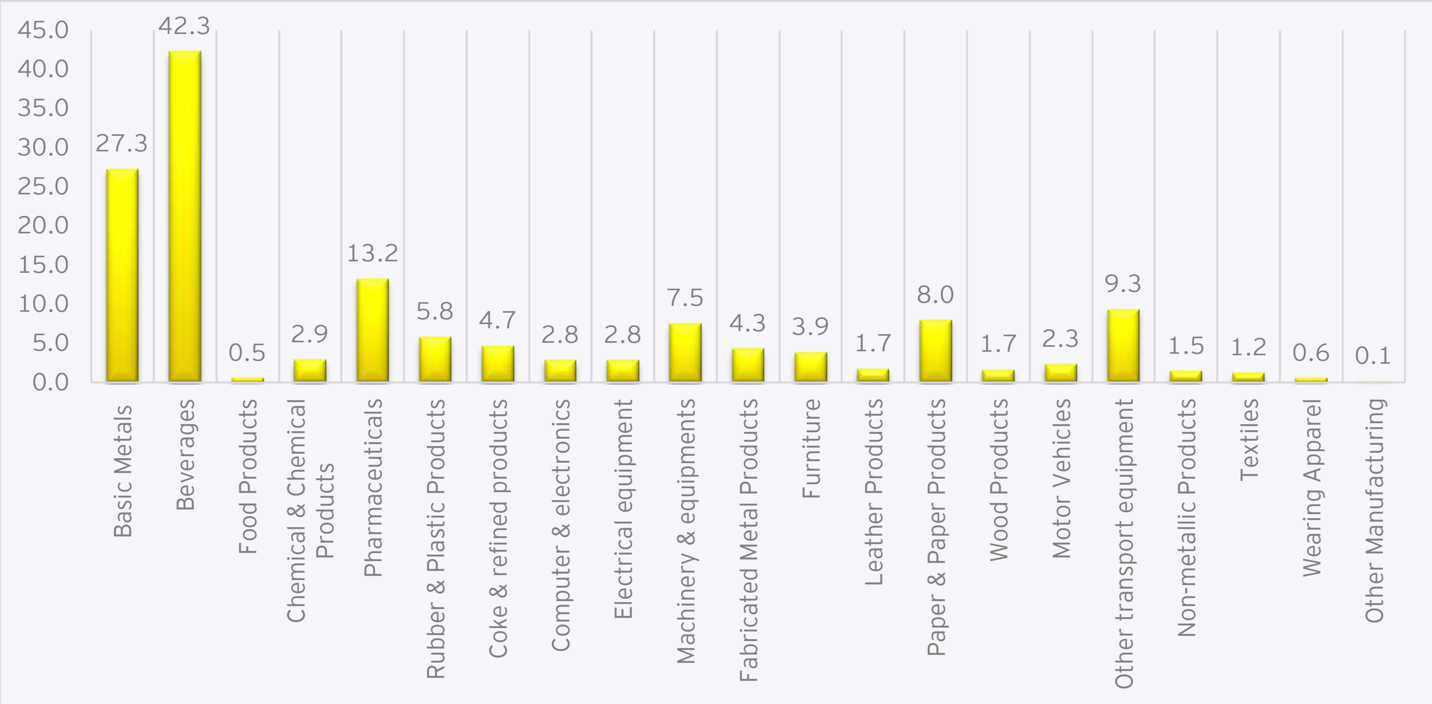


Figure 98: **[Hisar]** Category wise employment intensity

Following pie-charts showcase the sectors that have created maximum employment in each of the last 3 financial years.

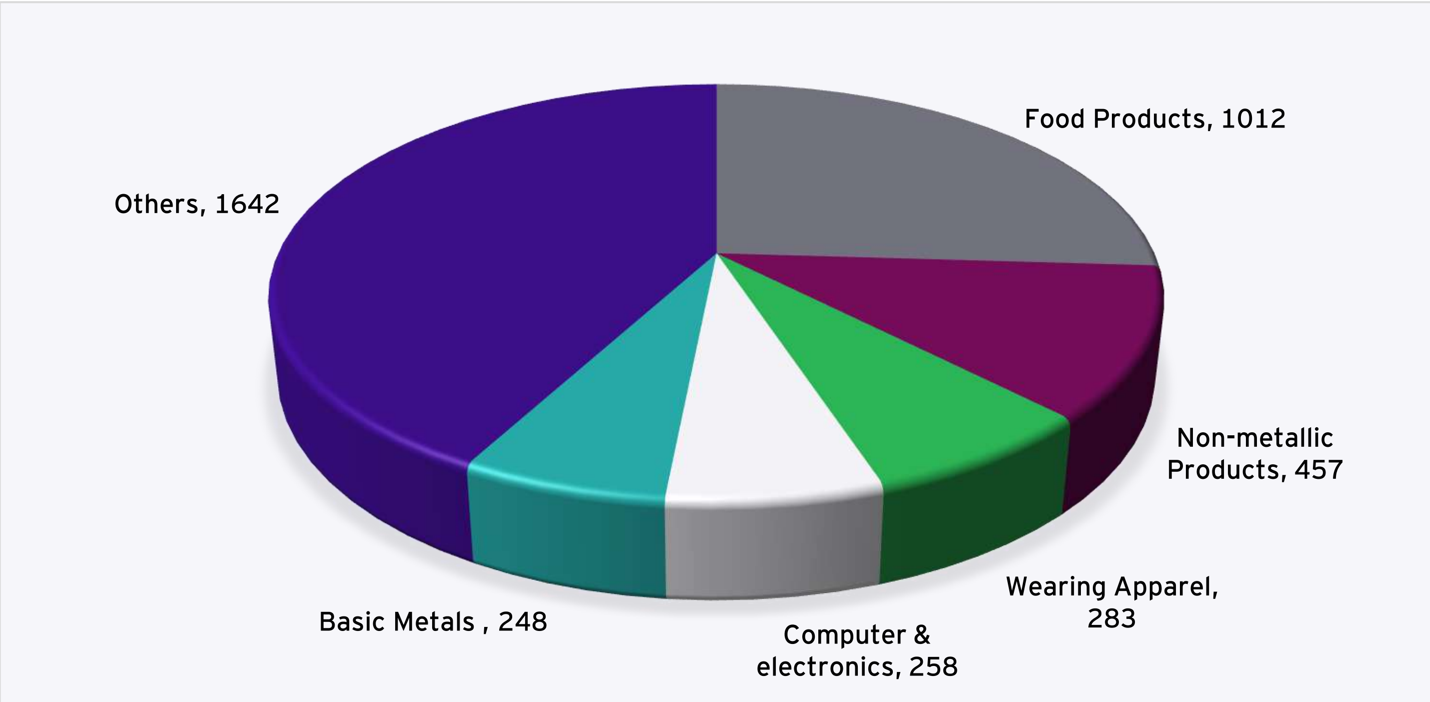


Figure 99: **[Hisar]** Top 5 Sectors with maximum new employment in last 3 Financial Years (FY'17-FY'19)

Key Takeaways

- Food products MSME sector provides the maximum employment (1526) followed by non-metallic sector (465) and basic metals sector (450).
- Further, Food products MSME sector has also created the maximum new employment in last 3 years (1012), followed by non-metallic products (457) & apparels (283).
- Beverages sector has maximum employment intensity with an average of 42.3 employees per unit, followed by basic metals with 27.3 employees per unit and pharmaceuticals at 13.2 employees per unit.
- Food products have the least employment intensity with only 0.5 employee per unit, followed by wearing Apparel at 0.6 employee per unit.
- Sectors such as transport equipment, motor vehicles and furniture, have experienced relatively low growth in new employment.

5. EXPORTS FROM THE DISTRICT

Key items of export of district Hisar are stainless steels strips/pipes.

Exports worth **INR 1,82,527.47 Lakhs** and **INR 1,84,563.59 Lakhs** were reported from Hisar for the year 2017-2018 and 2018-2019, respectively.

(The export figures above represent only exports related information that is available at the District Industries Centre, Hisar, and actual exports figure might be significantly higher).

6. NATURAL RESOURCES & RAW MATERIAL AVAILABLE

Hisar district mostly constitutes of alluvian plain of Indo-Gangetic basin. There is no perennial river flowing through the district and irrigation is mostly dependent on Bhakra and western Yamuna canals. The district is divided into 5 circles, that is, barani, the area which receives low rain and thus rain-fed dry-farming is practiced, bagar, the dry sandy tract of Hisar district on the land adjoining the border of Rajasthan, nahri, which is mostly anal-irrigated land, nali/naili, the fertile tract in the northern part of Hisar, it falls between Ghaggar river and Saraswati channel depression. The last circle is rangoi tract, the area irrigated by the rangoi canal.

7. KEY INDUSTRIAL ESTATES

There are six key industrial estates in district Hisar.

Table 95: Key Industrial Estates in Hisar

S. No.	Name of Industrial Area	Number of plots/shed
1	HSIIDC, Barwala, Phase I & II	856
2	Industrial Development colony Hisar	49
3	Industrial Estate Hisar (Sheds)	Type A: 20; Type B: 20
4	Rural Industrial Estate, Barwala (Sheds)	8
5	HUDA Sector 27-28, Hisar	321
6	Udyog Kunj, Chikanwas	31

8. SERVICES SECTOR SNAPSHOT

Below table gives snapshot of the services sector in Hisar:

Table 96: **[Hisar]** Services Sector Snapshot

S. No.	Industry	Total Units	Micro	Small	Medium	Total Investment (INR Lakhs)	Total employment
1	Civil Engineering	11	9	2	0	123	40
2	Construction of building	18	15	3	0	140	117
3	Electricity, gas, steam and air conditioning supply	7	7	0	0	34	15
4	Office administrative, office support and other business support activities	70	64	6	0	325	177
5	Other professional, scientific and technical activities	90	77	13	0	732	370
6	Repair and installation of machinery and equipment	30	24	6	0	213	87
7	Specialized construction activities	19	17	2	0	109	88
8	Architecture and engineering activities; technical testing and analysis	15	15	0	0	68	101
9	Financial service activities, except insurance and pension funding	22	20	2	0	94	62
10	Food and beverage service activities	204	181	23	0	1023	1526
11	Mining support service activities	1	1	0	0	3	3

12	Repair of computers and personal and household goods	137	133	4	0	310	358
13	Warehousing and support activities for transportation	38	28	9	0	740	246
14	Water collection, treatment and supply	2	0	2	0	65	15
15	Computer programming, consultancy and related activities	111	107	4	0	420	312
16	Human health activities	62	45	17	0	837	353
17	Information service activities	50	44	6	0	195	236
18	Real estate activities	20	14	5	1	622	50

9. MAJOR LARGE-SCALE UNITS

Apart from MSMEs, Hisar doesn't have significant presence of Large & Mega enterprises. Below table showcases number of Large & Mega enterprises in Hisar district.

Table 97: **[Hisar]** Large & Mega Units in each Sector

S. No.	Industry	Number	Names of Large & Mega Units
1	Food products	1	• Grover Agro Food Private Limited

10. CLUSTERS SCENARIO

Hisar has one mini cluster under implementation, that is, Textile & Allied Products Cluster as part of the State Mini Cluster Development Scheme.

Table 98: Mini Clusters in Hisar

S. No.	Cluster	Cluster Identification	DSR Preparation	DPR Preparation	Implementation
1	Textile & Allied Products Cluster	√	√	√	√

Some of the major exportable items from Haryana district include stainless steel strips, cotton yarn, sewing thread, medicines, alloy steel ingots, etc. Given the large presence of food products and wearing apparels units in Hisar, there is potential for new clusters within these industries.

11. INDUSTRY ASSOCIATIONS

There are four industrial associations in Hisar.

Table 99: Industry Associations in Hisar

S. No.	Name of Association	Name of President	Address	Contact
1	Hisar Industrial Association	Kuldeep Bhargawa, President	C/o Quality Foils (India)P. Ltd, A 3-IDC, Hisar	01162-220327-28 09812020075
2	Small Scale Industrial Association	Madan Lal Goyal, President	C/o Rajesh Steels, 49-IDC, Hisar	09416044583
3	New Industrial Area Welfare Association	Rakesh Bansal, President	c/o JNB Industries(P) Ltd. 51-52 Sec 27-28 Hisar	09812006989
4	The Hisar Udhyog Sangh	Mr Devender Jain, President		09812800223

12. KEY ISSUES OF THE INDUSTRIES

- Several issues have been raised by different industries associations that are stalling the growth of industries in the district. Some of the prominent issues pertain to the lack of infrastructure, irregular power supply, high electricity tariffs and lack of availability of skilled and semi-skilled manpower.

13. POTENTIAL AREAS OF INTERVENTION

- Effective grievance redressal mechanism involving representation from Distribution companies, Industry Associations & Industries Department to ensure false resolution of problems related to irregular power supply & electricity tariffs.
- DIC Hisar can facilitate closer collaboration between technical institutes in the district such as Polytechnic/ITIs etc. and local Industry.

14. POTENTIAL AREAS OF INVESTMENT

- Hisar has a highly developed food products industry with almost 550 MSMEs currently operational which includes 201 new units in last 3 financial years. The sector offers significant investment opportunity in the upstream food processing value chain facilities which can act as raw material suppliers to these units.
- Hisar also has significantly developed Chemical products & Leather products facilities with 122 & 116 MSMEs currently operational, offering opportunities for investment towards allied industries/facilities in these sectors.

12. Rewari

District Profile

EXECUTIVE SUMMARY

District Profile

MSME Scenario

12

Rewari

Famous for....

"Growing Fabricated metal industry"

1 MSMEs in Rewari

Total number of MSME units	1,741
New MSME units (last 3 years)	1,199

Food products

Fabricated Metal

Machinery & Equipment

Rubber & Plastic Products

Basic Metals

Top 5 sectors – Maximum number of MSMEs

2 Investment Scenario in Rewari

Total Investment (INR Lakhs)	57,462
New Investment (last 3 years; INR Lakhs)	10,088

Rubber & Plastic Products

Fabricated Metals

Machinery & Equipment

Textiles

Basic Metals

Top 5 sectors – Maximum investment by MSMEs

3 Employment Scenario in Rewari

Total Employment	12,301
New Employment (last 3 years)	3,530

Fabricated Metal

Wearing Apparel

Basic Metals

Rubber & Plastics Products

Machinery & Equipment

Top 5 sectors – Most employment generated

4 Potential for MSMEs

Fabricated Metal sector has significant investment potential towards raw materials supplies to these units and also sales enabling investments such as business development services, display centers, e-commerce etc.

Wearing apparel sector offers significant investment potential in facilities that can supply various types of raw materials required for this sector.

5 Others

Total Exports (FY 18-19; INR Lakhs)	21,101
Number of Large & Mega units	63
Existing Clusters	1 Mini Cluster

1. INTRODUCTION

A part of the National Capital Region, Rewari came into being as a separate district on 1 November, 1989. It was earlier a sub-division and tehsil headquarter of Mahendragarh district. Rewari is surrounded by Jhajjar district in the north, district Mahendragarh in west and Gurgaon in the east and north-east. The south/south-east boundary of Rewari touches district Alwar of Rajasthan.

Historically, it is believed that the district Rewari got its name from the daughter of king Rewat, Rewati during Mahabharta period. The king founded and established the city after his daughter's name called "Rewa wadi". He later gifted it at Rewati's marriage with Balram, elder brother of Lord Krishna, as part of the dowry. The city eventually came to be known as Rewari.

1.1 Geography

Rewari is situated in southern part of Haryana and is 82 kms away from Delhi, across NH8 (Delhi-Jaipur National Highway). Rewari district's boundary touches Jhajjar, Mahendergarh, Gurgaon and Alwar.

Being a neighbor of Rajasthan, Rewari receives dust storms during summer. Its climate is further influenced by rugged hilly terrain of Aravali ranges, and the sandy dunes in the district. Overall, Rewari's climate is dry with July, August & September as the primary rainy season months.

1.2 Demographic Profile

As per the 2011 census, Rewari's total population is 900,332 persons across a geographical area of 1,594 sq. kms. Rewari district has a population density of 565 persons per sq. km. The population growth rate for Rewari in the last decade (2001-2011) was 17.64%. Rewari has a high literacy rate of 80.99%. The district's sex ratio is lower than the national average of 940, i.e. 898 females per thousand males, but is better than the state average of 877.

1.3 Administrative Set-up

Rewari district has two sub-divisions (Rewari and Kosli), three Tehsils (Rewari, Bawal, Kosli) and one sub-Tehsil (Dharuhera). Further, it has 1 Municipal Council, 1 Municipal Committee, 2 market committees and 6 development blocks. Rewari has 398 villages and 348 Gram Panchayats.

The Deputy Commissioner is the Chief District Officer of the Administration and is assisted by a sub-divisional magistrate. The Additional Deputy Commissioner is the person in-charge of District Rural Development Agency (DRDA).

Rewari is a part of Mahendragarh and Rohtak Lok-Sabha constituencies and is also covered by 3 Assembly Constituencies, namely Bawal, Kosli and Rewari.

The following table shows categorization of blocks as per the status of industrial development.

Table 100: **[Rewari]** Categorization of Blocks

Block A	Block B	Block C	Block D
Bawal	Rewari	Khol at Rewari	Nahar
		Jatusana	
		Dahina	

2. SECTOR WISE MSME LANDSCAPE

Following table shows the total number of MSME units in each sector, in Rewari, along with the bifurcation of number of micro, small and medium enterprises.

The table also shows number of new units that started their commercial production in the last three financial years.

Table 101: **[Rewari]** No. of MSME Units in each Sector

S. No.	Industry	Total Units	Micro	Small	Medium	FY' 17	FY'18	FY'19	New Units (Last 3 Years)
Metals & Mineral Products									
1	Basic metals	56	36	18	2	2	0	0	2
2	Fabricated metal products, except machinery & equipment	94	51	38	5	11	20	6	37
3	Non-metallic mineral products	48	39	8	1	7	7	3	17
Food, Beverages & Tobacco									
4	Beverage	6	4	2	0	1	1	0	2
5	Food products	66	53	11	2	11	16	10	37
Pharma, Petro-Chemicals, Rubber products									
6	Chemicals & Chemical Products	25	16	9	0	2	6	0	8
7	Coke & refined petroleum products	4	3	1	0	0	2	1	3
Electrical, Electronics & Machinery									

8	Computer, electronic & optical products	8	6	2	0	1	1	0	2
9	Electrical equipment	26	16	9	1	7	2	3	12
10	Machinery & equipment	57	32	24	1	6	8	5	19
Leather, Wood & paper									
11	Furniture	16	12	4	0	1	3	0	4
12	Leather & related products	24	20	4	0	1	3	0	4
13	Paper & paper products	32	23	9	0	3	6	1	10
14	Wood & products of wood & cork, except furniture; articles of straw & plaiting materials	30	26	4	0	4	4	1	9
Automotive & Auto-Components									
15	Motor vehicles, trailers & semi-trailers	18	8	8	2	4	0	2	6
16	Other transport equipment	2	2	0	0	0	1	0	1
Pharma, Petro-Chemicals, Rubber products									
17	Pharmaceutical, medicinal chemical & botanical products	3	2	1	0	1	1	0	2
18	Rubber & plastics products	61	28	30	3	10	3	5	18
Textiles & Apparel									
19	Textiles	40	26	11	3	6	6	2	14
20	Wearing apparel	918	914	3	1	9	785	113	907
Other Manufacturing									
21	Repair and installation of machinery & equipment	31	25	6	0	4	5	4	13
22	Other manufacturing	176	136	35	5	23	32	17	72

Following scatter diagram shows the comparison between total units in each sector vis-a-vis new units opened in the last 3 financial years.

Figure 100: **[Rewari]** Total Units & New Units in each Sector

2.1 Top 10 Sectors: Based on Number of Units

Following table shows top ten sectors in Rewari, based upon the total number of MSME units in the district.

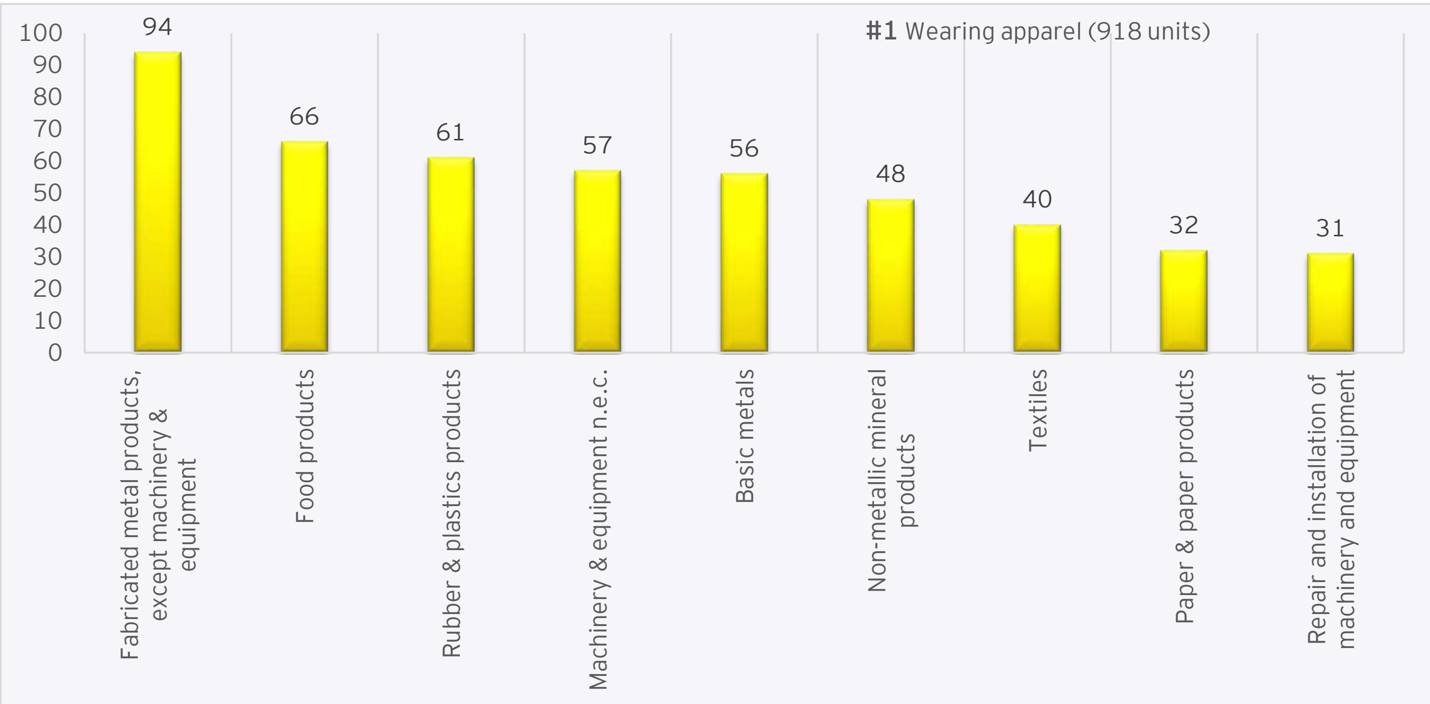


Figure 101: **[Rewari]** Top 10 sectors - Total No. of MSME Units

2.2 Top 10 Sectors: Based on New Units in Last 3 Years

Following table shows the top ten sectors in Rewari, based upon number of new MSME units set-up in the last three years.

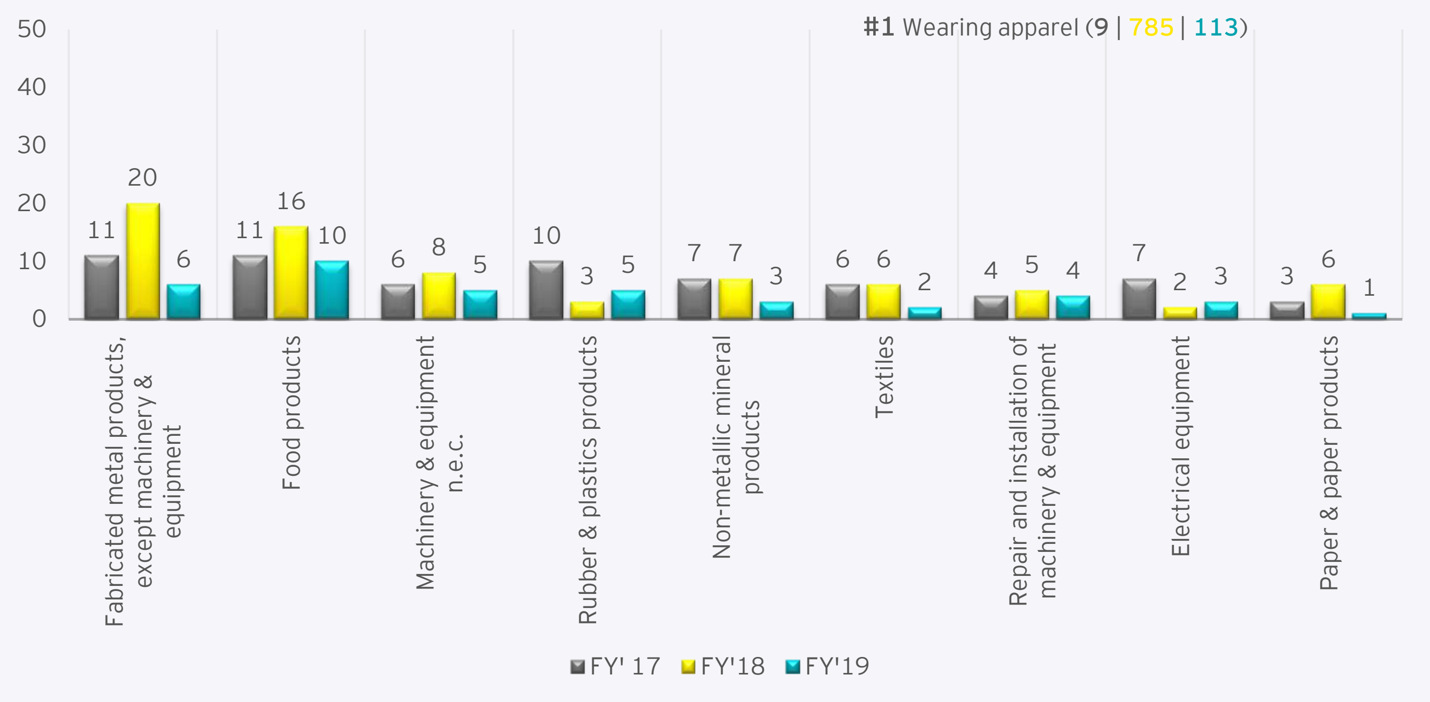


Figure 102: **[Rewari]** Top 10 Sectors - New Units in Last 3 Years

Key Takeaways

- Maximum number of MSME units in Rewari are involved in the apparels, fabricated metal products (except machinery & equipment) sector, followed by food Products.
- In the last three years as well, apparel sector has seen maximum number of new MSME units opened (907), followed by fabricated metal products, except machinery & equipment, (37) and food products (37).
- In terms of the percentage growth, Apparel sector in Rewari has come up in a huge way and has experienced impressive recent growth with 99% of the total units having opened-up in the last 3 years, followed by coke & refined petroleum products.

3. SECTOR WISE INVESTMENT SCENARIO

Punjab National Bank is the convener bank of State Level Bankers' Committee (SLBC) in Haryana and also the district lead bank of Rewari.

Following table shows the total Investment by MSMEs in each sector in Rewari, along with new investment in the last three financial years (figures are in Lakhs).

Table 102: **[Rewari]** Total Investment by MSMEs

S. No.	Industry	Investment (INR Lakhs)				
		Total Investment	FY'17	FY'18	FY'19	New Investment (Last 3 Years)
Metals & Mineral Products						
1	Basic metals	3614	99	0	0	99
2	Fabricated metal products, except machinery & equipment	9115	1258	491	88	1837
3	Non-metallic mineral products	1493	81	85	40	206
Food, Beverages & Tobacco						
4	Beverage	123	20	20	0	40
5	Food products	2956	228	249	114	591
Pharma, Petro-Chemicals, Rubber products						
6	Chemicals & Chemical Products	1217	21	227	0	248
7	Coke & refined petroleum products	262	0	10	2	12
Electrical, Electronics & Machinery						
8	Computer, electronic & optical products	97	4	5	0	9
9	Electrical equipment	1984	53	11	18	82
10	Machinery & equipment n.e.c.	4617	541	677	117	1335
Leather, Wood & paper						
11	Furniture	254	5	37	0	42
12	Leather & related products	235	5	62	0	67
13	Paper & paper products	1344	335	41	40	416
14	Wood & products of wood & cork, except furniture; articles of straw & plaiting materials	715	45	18	20	83
Automotive & Auto-Components						

15	Motor vehicles, trailers & semi-trailers	2920	50	0	22	72
16	Other transport equipment	22	0	2	0	2
Pharma, Petro-Chemicals, Rubber products						
17	Pharmaceuticals, medicinal chemical & botanical products	92	1	1	0	2
18	Rubber & plastics products	7700	417	167	127	711
Textiles & Apparel						
19	Textiles	5031	1196	108	17	1321
20	Wearing apparel	2478	47	1010	134	1191
Other Manufacturing						
21	Repair and installation of machinery & equipment	244	30	34	18	82
22	Other manufacturing	10949	674	741	225	1640

Following scatter diagram shows a comparison of total MSME investment and new investment in the last 3 financial years, across different sectors of Rewari.

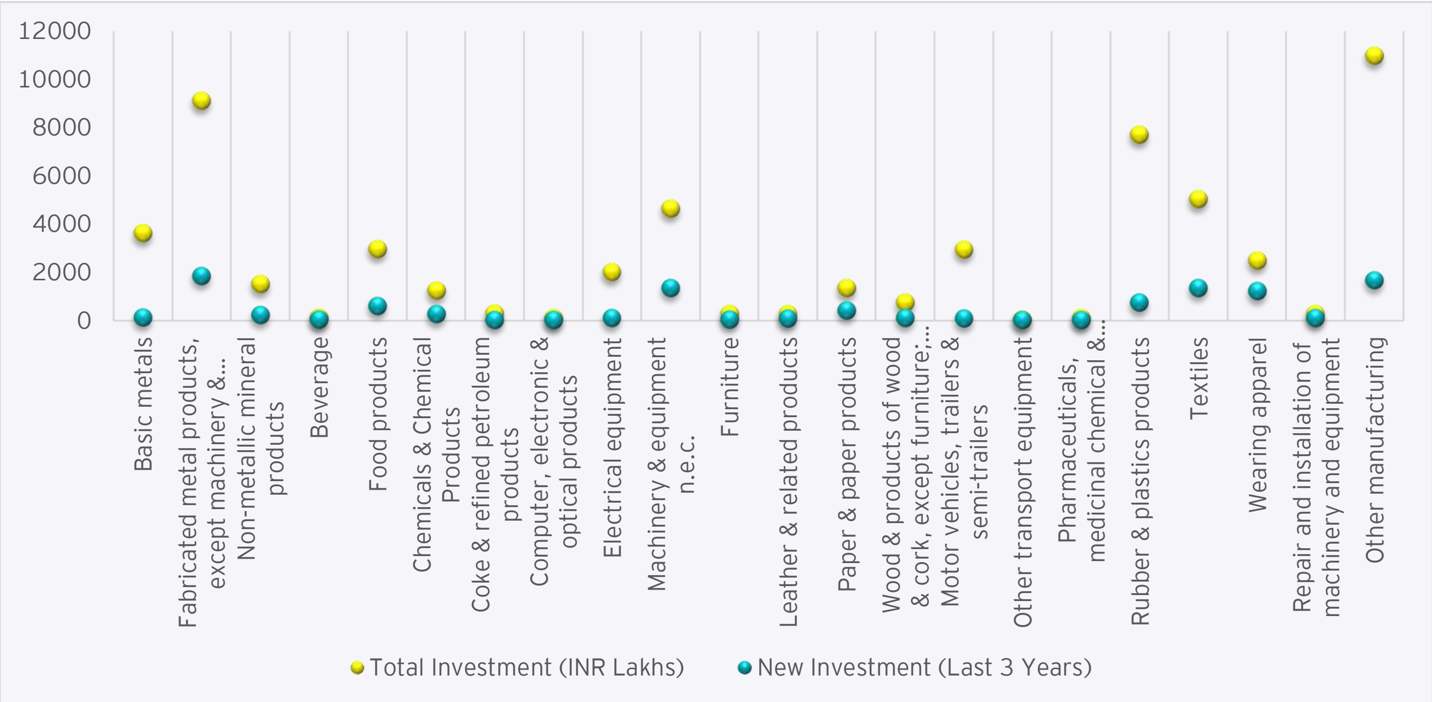


Figure 103: **[Rewari]** Total Investment & New Investment in Last 3 Financial Years (FY'17-FY'19)

Following pie-chart showcases the sectors that have attracted maximum investments in the last 3 financial years (figures are in Lakhs).

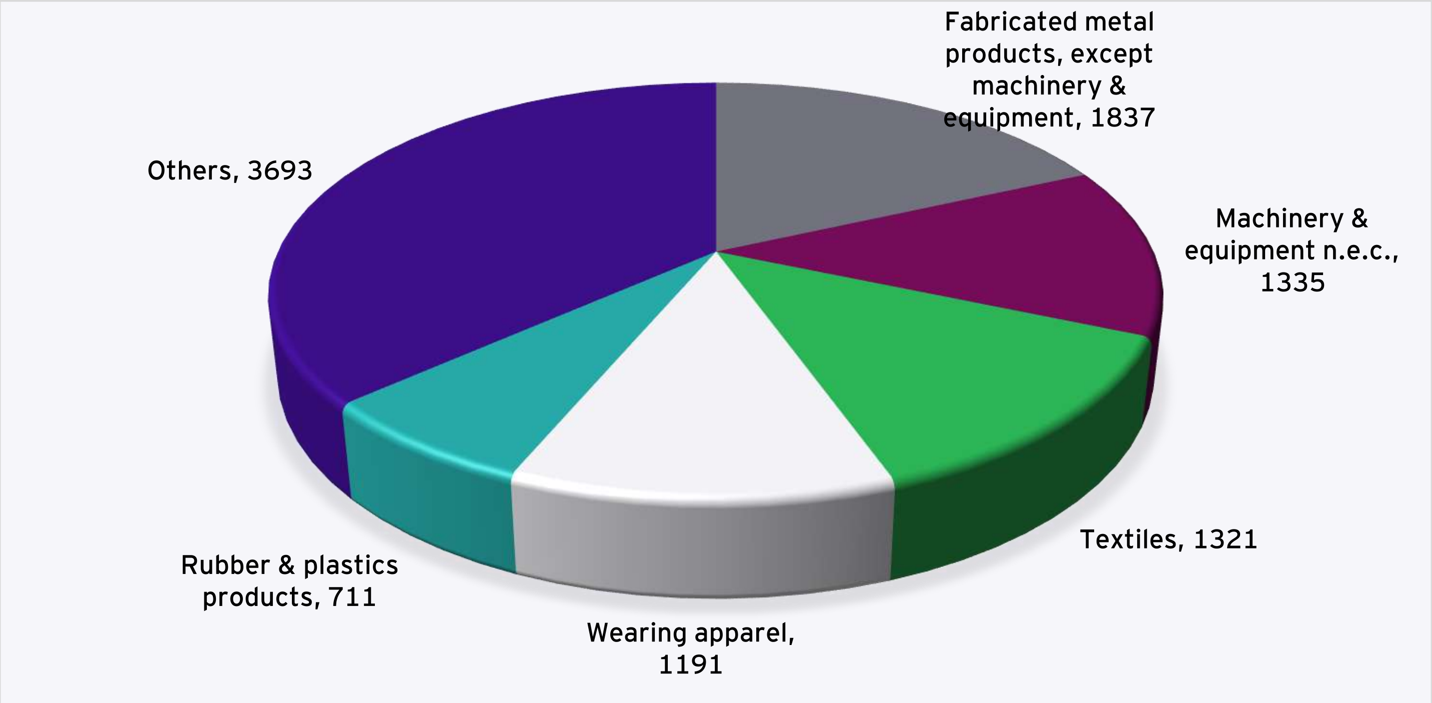


Figure 104: **[Rewari]** Top 5 Sectors with maximum investment in last 3 Financial Years (FY'17-FY'19)

Following diagram shows a comparison of compound annual growth rate of various sectors for last three financial years.

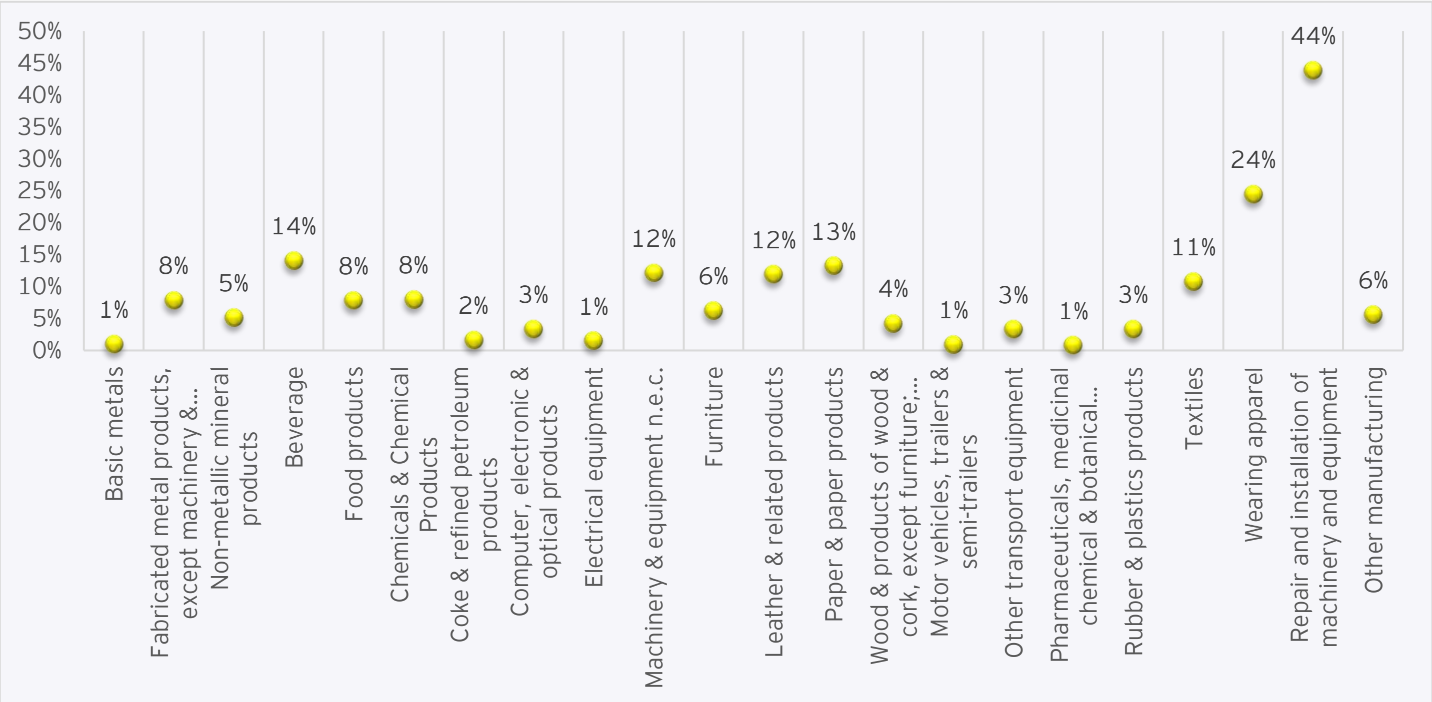


Figure 105: **[Rewari]** CAGR for Last 3 Financial Years (FY'17-FY'19)

Key Takeaways

- Highest amount of investment by MSMEs in Rewari has been in fabricated metal products, except machinery & equipment sector (INR 91.15 Cr.), followed by rubber & plastic products sector (INR 77.00 Cr.).

- Besides being the sector with highest total investment fabricated metal products along with machinery & equipment sector also attracted maximum investment in the last three financial years (INR 18.37 Cr. and INR 13.35 Cr. respectively).

- Sectors with high CAGR in MSME investments in the last 3 FYs are: repair and installation of machinery and equipment (44%), wearing apparel (24%), beverage (14%), paper and paper products (13%), machinery & equipment (12%) and leather & related products (12%).

4. SECTOR WISE EMPLOYMENT SCENARIO

Below table showcases the total employment created by MSMEs in each of the sectors, along with new employment created in the last three financial years.

Table 103: **[Rewari]** Total Employment in each Sector

S. No.	Industry	Total employment	FY'17	FY'18	FY'19	New Employment (Last 3 Years)
Metals & Mineral Products						
1	Basic metals	1046	19	0	0	19
2	Fabricated metal products, except machinery & equipment	1601	101	124	28	253
3	Non-metallic mineral products	569	74	55	23	152
Food, Beverages & Tobacco						
4	Beverage	42	5	5	0	10
5	Food products	458	50	108	43	201
Pharma, Petro-Chemicals, Rubber products						
6	Chemicals & Chemical Products	225	4	24	0	28
7	Coke & refined petroleum products	24	0	12	3	15
Electrical, Electronics & Machinery						

8	Computer, electronic & optical products	70	3	2	0	5
9	Electrical equipment	464	46	10	9	65
10	Machinery & equipment n.e.c.	744	78	121	22	221
Leather, Wood & paper						
11	Furniture	83	2	12	0	14
12	Leather & related products	131	10	28	0	38
13	Paper & paper products	347	47	20	24	91
14	Wood & products of wood & cork, except furniture; articles of straw & plaiting materials	270	25	18	5	48
Automotive & Auto-Components						
15	Motor vehicles, trailers & semi-trailers	578	30	0	7	37
16	Other transport equipment	21	0	7	0	7
Pharma, Petro-Chemicals, Rubber products						
17	Pharmaceuticals, medicinal chemical & botanical products	24	2	2	0	4
18	Rubber & plastics products	1071	66	24	43	133
Textiles & Apparel						
19	Textiles	470	49	39	12	100
20	Wearing apparel	1645	32	1227	137	1396
Other Manufacturing						
21	Repair and installation of machinery & equipment	106	10	29	7	46
22	Other manufacturing	2312	134	427	86	647

Following scatter diagram shows a comparison of total employment across different MSME sectors and new employment generated in the last 3 financial years.

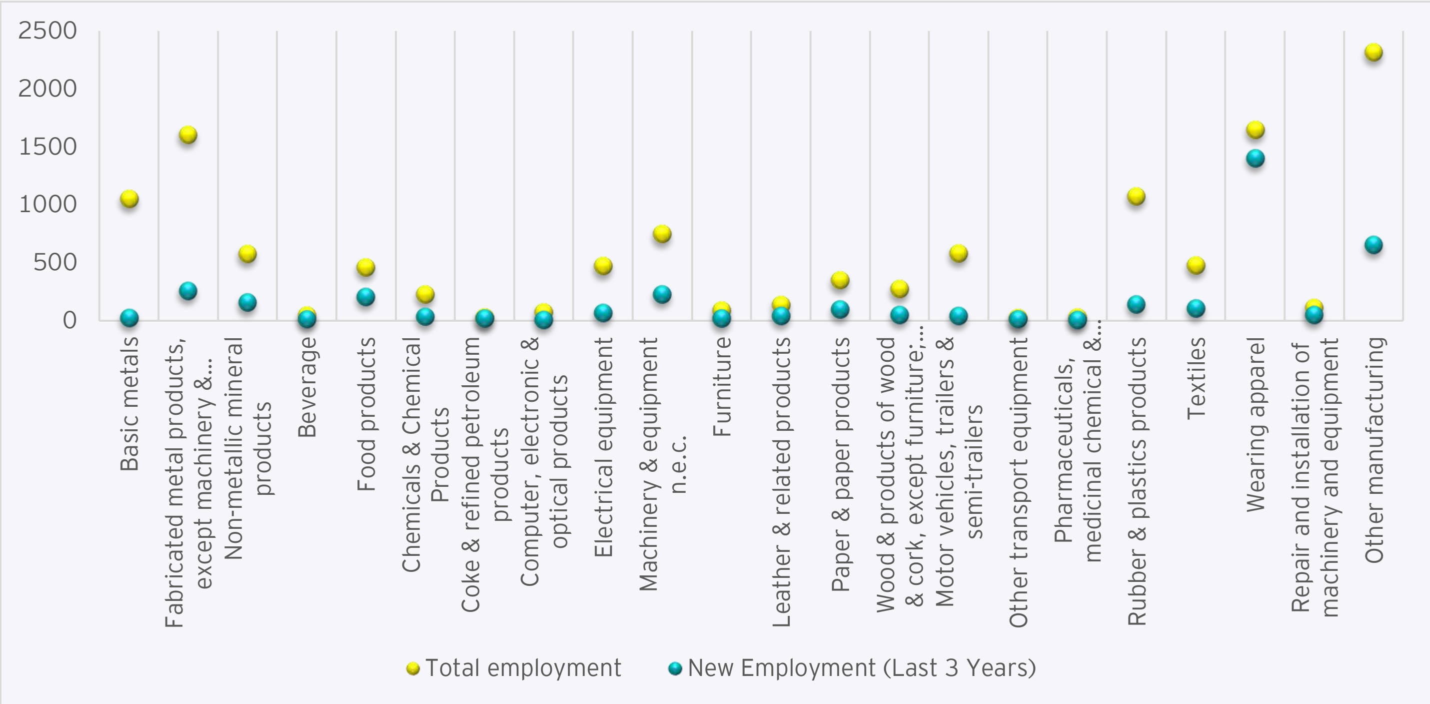


Figure 106: **[Rewari]** Total Employment & New employment in last 3 Financial Years (FY'17-FY'19)

Following bar chart showcases category wise per unit employment analysis for MSMEs in Rewari.

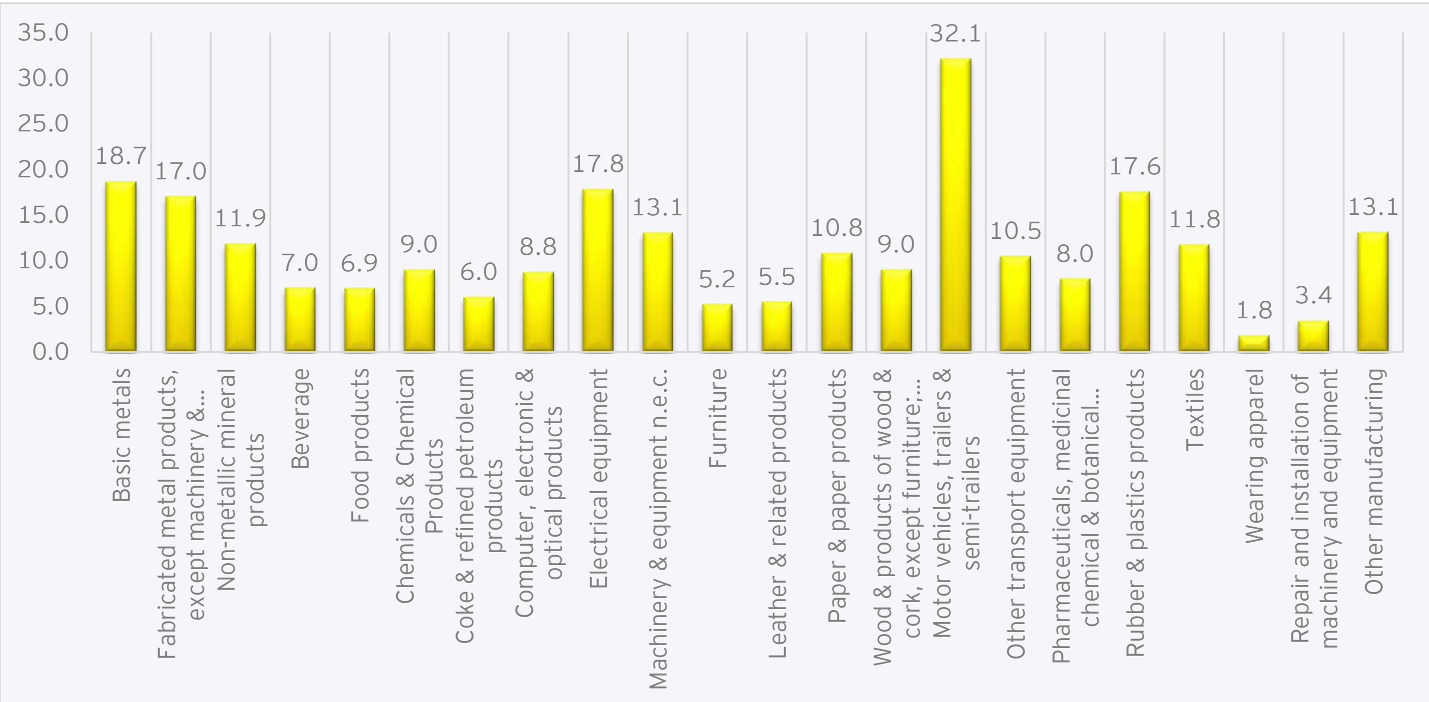


Figure 107: **[Rewari]** Category wise employment intensity

Following pie-charts showcase the sectors that have created maximum employment in each of the last 3 financial years.

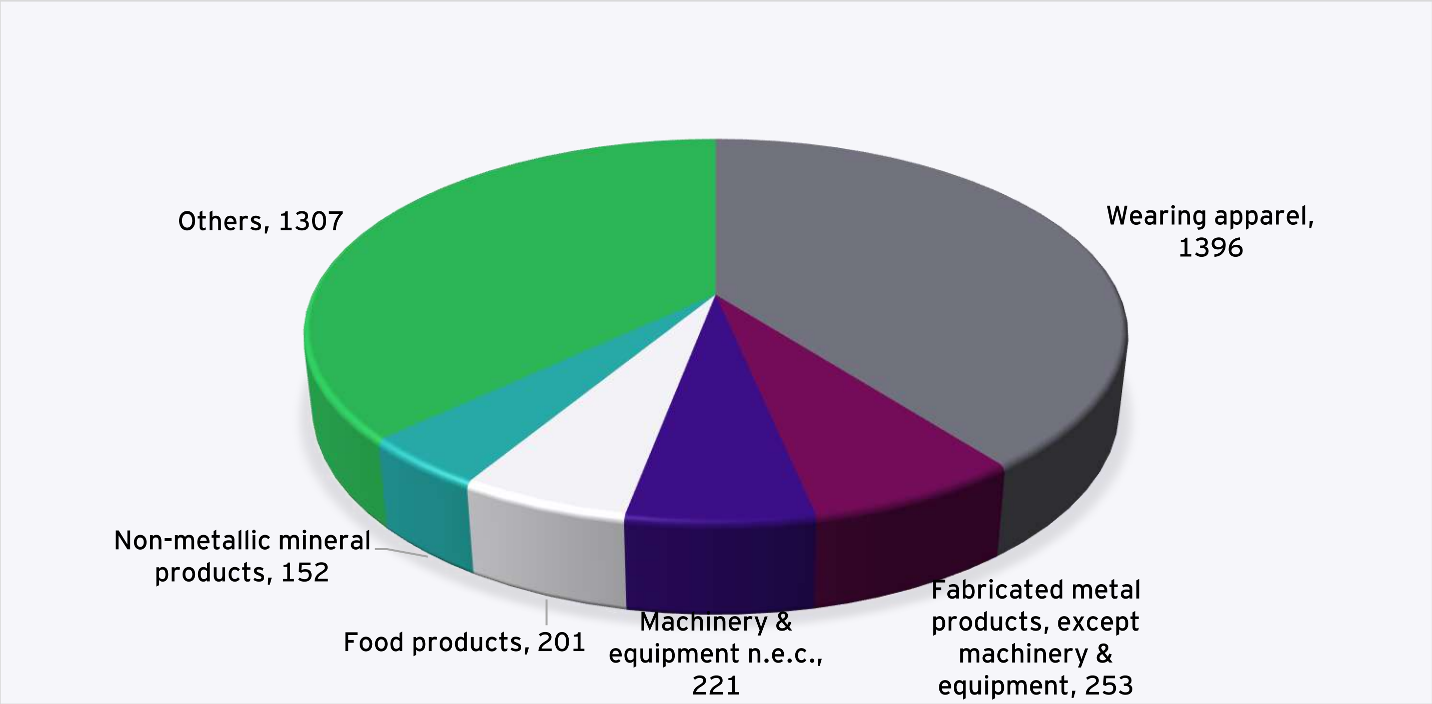


Figure 108: **[Rewari]** Top 5 Sectors with maximum new employment in last 3 Financial Years (FY'17-FY'19)

Key Takeaways

- Apparels MSME sector provides the maximum employment (1645) followed by fabricated metal products sector (1601) & rubber & plastic products sector (1071).
- Further, apparels MSME sector has also created the maximum new employment in last 3 years (1396), followed by fabricated metal products (253) & machinery & equipment (221).
- 'Motor vehicles, trailers & semi-trailers' sector has maximum employment intensity with an average of 32.1 employees per unit, followed by basic metals with 18.7 employees per unit and electrical equipment at 17.8 employees per unit.
- Wearing apparels has the least employment intensity with only 1.8 employees per unit, followed by repair and installation of machinery and equipment at 3.4 employees per unit.
- Sectors such as 'pharmaceuticals, medicinal, chemical & botanical' products and 'computer, electronic & optical products', have experienced relatively low growth in new employment.

5. EXPORTS FROM THE DISTRICT

Key exports products from Rewari include motorcycles, zip fasteners and auto glass.

Exports worth **INR 52,317.36 Lakhs** and **INR 21101.47 Lakhs** were reported for the year 2017-2018 and 2018-2019 from district Rewari.

(The export data in the table shows only exports related information that is available at the District Industries Centre, Rewari, and actual exports figure might be significantly higher).

6. NATURAL RESOURCES & RAW MATERIAL AVAILABLE

Rewari district comprises of four types of terrains, i.e. barren rock/stony waste/sheet rocky, sandy plain with sand dunes, old flood plains, some occurrence of hillocks and undulating uplands (with or without scrub).

Excellent quality of slate is found in Rewari along with almost inexhaustible deposits of quartzite in the Aravali ranges in the district.

Mostly, the soil in the district is relatively sandy loam, light loam and comprises of rocky surfaces.

There is no perennial river/stream in the area, hence Sahibi is an important seasonal river. Wells and tube-wells play a major role in the irrigation network of the district.

The prominent flora in the district is Xerophytic. Common tree found in Rewari are Khairi, Jand, Pahari Kikar, Kikar, Dhok, Babool, Rohera, Janti or Reru, Jal or Van, Beri, Barh, Pipal, Lasura, Imli, Barna, Shisham, Siris, Neem, Farash, Henna, Papri, Gular, Indokh, Tut, Gulmohar, Simbal, Kaindu, Bakain, Safeda, Arind and Dhak.

The major kharif crop of Rewari is bajra while the minor ones are paddy, jowar, cotton and kharif vegetables (onions, turnips and cucumber).

The major rabi crops of Rewari are wheat, oilseeds, etc. and minor ones include barley, gram and rabi vegetables. Dry farming is practiced due to deficiency in irrigational facilities and scanty rainfall.

7. KEY INDUSTRIAL ESTATES

There are three major industrial areas in district Rewari.

Table 104: Key Estates in Rewari

S. No.	Name of Industrial Area	Number of Plots/Sheds
1	IMT, Bawal	1207
2	Dharuhera Industrial Area	755
3	Rewari Industrial Area	63

8. MAJOR LARGE-SCALE UNITS

Apart from MSMEs, Rewari also has about 63 Large & Mega enterprises operational in various sectors. Below table showcases number of Large & Mega enterprises in each sector along with their names.

Table 105: **[Rewari]** Large & Mega Units in each Sector

S. No.	Industry	Number	Names of Large & Mega Units
1	Basic Metals	9	• Lifelong India Pvt. Ltd. • Gupta Sheet Metal • Aggarwal Metal Works • Everest Metal Works • Unimet Profiles Pvt. Ltd. • Asian Colour Coated Ispat Ltd • TI Metal Forming • Coventry Coil-o-Matic (Haryana) Ltd. • Posco India Steel Processing
2	Food Products	5	• Kerry Ingredients India Pvt Ltd • Darshan Foods Pvt Ltd • Indo Nissin Foods Pvt Ltd • Rei Agro Ltd • Nirvana Biosys Pvt Ltd
3	Machinery and Equipment	2	• TII India Pvt Ltd • Hema Engineering
4	Motor Vehicles, Trailers and Semi-trailers	28	• Hero Motocorp • Musashi Auto Parts • Sankei Giken Pvt Ltd • Mitsui Kinzoku Pvt Ltd • NTN Manufacturing Pvt Ltd • Keihin Fie Pvt Ltd • Ngk Sparkplug India Pvt Ltd • Wheels India Ltd. • India Japan Lighting • TVS Lucas

			• Goshi India Auto Parts Pvt Ltd • Caparo Maruti Ltd • Jtekt Sona Automotive India Ltd • Minda Furukawa Pvt Ltd • Tenneco Rc India Pvt Ltd • TII India Pvt Ltd • Omax Autos Pvt Ltd • Sona Koyosteering Systems Pvt Ltd • Autofit Pvt Ltd • Rico Auto Industries • GKN Drivelines Pvt Ltd • Lumax Industries Ltd • Talbros Auto Components Pvt Ltd • Minda Furukawa Electric Pvt Ltd • Polyplastics Automotive India Pvt Ltd • Munjal Auto Industries Ltd • Satyam Auto Pvt Ltd • Dhingra Trucking
5	Pharmaceuticals, Medicinal Chemical and Botanical Products	5	• Hollister Medical India Pvt Ltd • Microtrol Sterilization Services Pvt Ltd • Betcon Dickkinson Pvt Ltd • Occil India Pvt Ltd • Capsugel Health Care
6	Rubber and Plastics Products	11	• Minda TG Rubber India Pvt Ltd • AG Industries Pvt Ltd • Polyplastic Automotive Pvt Ltd • Heapro Continental Maufacturing Company • Sanko Svance Jrg Tooling India Pvt Ltd • Atlas Pet Plas Industries Pvt Ltd • Minda Kyoraku • Nerolac Paints • Lumax Industries • India Japan Lighting
7	Textiles	3	• Mercury Fabrics Pvt Ltd • Colour Creations Pvt Ltd • Guetermann India Pvt Ltd

9. SERVICES SECTOR SNAPSHOT

Below table gives snapshot of the services sector in Rewari:

Table 106: **[Rewari]** Services Sector Snapshot

S. No.	Industry	Total Units	Micro	Small	Medium	Total Investment (INR Lakhs)	Total employment
1	Accommodation	7	5	2	0	62	37
2	Activities of head offices; management consultancy activities	9	9	0	0	33	41
3	Activities of membership organizations	3	3	0	0	9	8
4	Advertising and market research	5	5	0	0	16	14
5	Architecture and engineering activities; technical testing and analysis	7	6	1	0	36	57
6	Civil Engineering	11	10	1	0	53	127
7	Computer programming, consultancy and related activities	45	40	5	0	304	163
8	Construction of building	3	3	0	0	20	20
9	Creative, arts and entertainment activities	10	10	0	0	25	22
10	Education	59	52	7	0	343	411
11	Employment activities	40	31	9	0	469	2020
12	Financial service activities, except insurance and pension funding	9	9	0	0	31	23

13	Food and beverage service activities	56	50	6	0	365	193
14	Human health activities	42	32	10	0	484	310
15	Information service activities	19	19	0	0	70	83
16	Land transport and transport via pipelines	81	42	39	0	1474	482
17	Other financial activities	11	11	0	0	39	36
18	Other Personal Service Activities	152	112	40	0	2510	1370
19	Other professional, scientific and technical activities	100	80	19	1	1403	511
20	Postal and courier activities	11	11	0	0	31	36

10. CLUSTERS SCENARIO

There is one General Engineering Cluster in Rewari. A common facility center has been set-up by the SPV for testing and machining. The major products of the cluster are auto components, plastic and rubber products.

Table 107: Mini Clusters in Rewari

S. No.	Cluster	Cluster Identification	DSR Preparation	DPR Preparation	Implementation
1	Engineering Cluster	√	√	√	√

There is tremendous scope for more clusters in the auto components and fabrication works sectors.

11. INDUSTRY ASSOCIATIONS

There are two key industrial associations in Rewari.

Table 108: Industry Associations in Rewari

S. No.	Name of Association	Name of President	Address	Contact
1	Rewari Chamber of Commerce & Industries, Bawal	Mr. Pankaj Yadav Mr. S.N. Sharma (Vice President)	C/o M/s Everest Metal jhakkar Road,Rewari	9466997655
2	Rewari Small Scale Industrial Association, Rewari	Mr. Amit Gupta	C/o M/S Y.K.K. India Ltd, Bawal Distt. Rewari	9896056122

12. KEY ISSUES OF THE INDUSTRIES

Some of the key issues impacting Industries in Rewari are:

- Lack of proper infrastructure.
  - The roads are in a very bad condition.
  - Even though, road construction work has been allotted to HSIIDC, but a proper drainage system hasn't been taken into consideration. As a result of which, the roads may go back to its earlier state.
- There is no fire station in operation to cater to the 400 industries (approx.) in Bawal.
- Pollution consent renewal fee is forfeited by HSPCB, even on rejection of the consent renewal application.
- In the Dharuhera and Bawal Industrial areas
  - There is a lack of proper street lighting, drainages.
  - There is no area allotted for garbage storage

13. POTENTIAL AREAS OF INTERVENTION

- Industries department may coordinate with HSIIDC and Fire department etc. to address the infrastructure issues of Rewari industry such as road maintenance, fire station, street lighting, ETP, STP, solid waste management etc.
- Issue of forfeiting of renewal fee even in cases of rejection needs to be discussed with HSPCB.

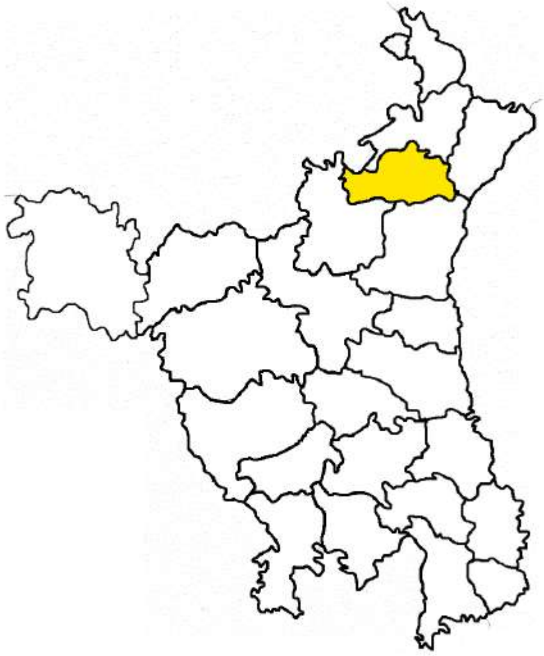
14. POTENTIAL AREAS OF INVESTMENT

- The key industry in Rewari consists of the 'Wearing Apparel' sector, with around 918 units, with a majority of units starting operations in last 3 years. Sector offers significant investment potential in facilities that can supply various types of raw material required for this sector.

- 'Fabricated Metal' sector is another key industry in Rewari district with 94 units currently operational and 37 new units in last three financial years. The sector offers significant investment potential towards raw materials supplies to these units and also sales enabling investments such as business development services, display centers, e-commerce etc.

13. Kurukshetra

District Profile



EXECUTIVE SUMMARY

District Profile

MSME Scenario

13

Kurukshetra

Famous for....

"Rice Production"

1 MSMEs in Kurukshetra

Total number of MSME units 1,647

New MSME units (last 3 years) 697

- Food Products
- Wearing Apparel
- Textiles
- Chemicals & Chemical Products
- Non-metallic mineral products

Top 5 sectors – Maximum number of MSMEs

2 Investment Scenario in Kurukshetra

Total Investment (INR Lakhs) 43,129

New Investment (last 3 years; INR Lakhs) 14,765

- Food Products
- Paper & Paper Products
- Rubber & Plastic Products
- Machinery & Equipment
- Wearing Apparel

Top 5 sectors – Maximum investment by MSMEs

3 Employment Scenario in Kurukshetra

Total Employment 9,725

New Employment (last 3 years) 3,605

- Food Products
- Paper & paper products
- Non-metallic mineral products
- Wearing Apparel
- Machinery & Equipment

Top 5 sectors – Most employment generated

4 Potential for MSMEs

Opportunity in investment towards ancillary support to Food Products units such as marketing & branding services, exports consultancy services, cold/storage warehousing services, downstream food products industries etc.

Chemical Products sector offers attractive investment opportunity in upstream products which can act as raw material suppliers to these units

5 Others

Total Exports (FY 18-19; INR Lakhs) 53,954

Number of Large & Mega units 1

Existing Clusters 1 Mini Cluster

1. INTRODUCTION

Kurukshetra was formed as a district of Haryana in January 1973 to include the areas of Thanesar, Ladwa, Shahabad & Pehowa. The district lies on the national highway 44 which is the longest national highway in India. Govt. has also announced a new 230 Km highway to connect Kurukshetra to Mahendergarh in Haryana. Kurukshetra occupies an important place in Indian mythology and accordingly is a key destination for religious tourists & pilgrims.

1.1 Geography

Kurukshetra lies towards the north of the Haryana state, and is surrounded by Ambala on the north, Yamunanagar in the east, Karnal in the east & south, Kaithal in the south & west & a small border with Punjab on the west. The district is largely flat and lies along the haryana plains on the eastern side.

Kurukshetra has sub-tropical continental monsoon climate and receives rainfall mostly in monsoon season with some unreliable rainfall in winter season because of western disturbances. Key rivers passing through the district include Markanda & Saraswati, and Chautang & Dangri are the major seasonal rivers. Soil found in the district is known to be low in granularity, and is mostly compact & stiffy loam.

1.2 Demographic Profile

As per the census of 2011, total population of Kurukshetra is 964655 with a population density of 630 people per sq. KM. Rural to urban percentage distribution is 71.1% & 28.9% respectively. Kurukshetra has an average literacy rate of 76.31% with male literacy rate of 72.57% and female literacy rate of 60.85%. The district has a higher female to male ratio at 888 females per thousand males, compared to the state average of 877 but significantly lower than the national average of 940. Around 44% of the population is employed in agriculture either as cultivators or agricultural laborers.

1.3 Administrative Set-up

Kurukshetra has a total land area of 1530 Sq. Km. The district has 4 Tehsils (Thanesar, Ladwa, Shahabad, Pehowa), 2 Sub-tehsils (Babain, Ismailabad), 4 sub-divisions, 7 development blocks, 394 Panchayats and around 419 villages.

The following table shows categorization of blocks as per the status of industrial development.

Table 109: **[Kurukshetra]** Categorization of Blocks

Block A	Block B	Block C	Block D
		Pehowa	
		Thanesar	
		Ladwa	
		Shahabad	
		Babain	
		Ismailabad	
		Pipli	

2. SECTOR WISE MSME LANDSCAPE

Following table shows the total number of MSME units in each sector, in Kurukshetra, along with the bifurcation of number of micro, small and medium enterprises.

The table also shows number of new units that started their commercial production in the last three financial years.

Table 110: **[Kurukshetra]** No. of MSME Units in each Sector

S. No.	Industry	Total Units	Micro	Small	Medium	New Units (Last 3 Years)
Food, Beverages & Tobacco						
1	Food products	635	441	187	7	229
2	Beverages	8	7	1	_	4
Textiles & Apparel						
3	Textiles	71	65	6	_	38
4	Wearing apparel	183	173	10	_	92
Leather, Wood & paper						
5	Leather and related products	15	15	_	_	8
6	Wood and products of wood and cork, except furniture; articles of straw and plaiting materials	52	43	9	_	21
7	Paper and paper products	45	32	12	1	19
8	Furniture	41	40	1	_	19
Pharma, Petro-Chemicals, Rubber products						
9	Pharmaceuticals, medicinal chemical and botanical products	32	27	5	_	18

10	Chemicals and chemical products	63	52	11	_	31
11	Manufacture of coke and refined petroleum products	7	5	2	_	3
12	Rubber and plastics products	38	27	11	_	12
Metals & Mineral Products						
13	Basic metals	31	22	9	_	13
14	Fabricated metal products, except machinery and equipment	42	37	5	_	20
15	Non-metallic mineral products	58	49	9	_	32
Electrical, Electronics & Machinery						
16	Computer, electronic and optical products	25	22	3	_	8
17	Electrical equipment	41	39	2	_	18
18	Machinery and equipment	56	42	14	_	19
Automotive & Auto-Components						
19	Motor vehicles, trailers and semi-trailers	10	9	1	_	3
20	Other Transport Equipment	4	3	1	_	2
Other Manufacturing						
21	Other manufacturing	190	174	14	2	88

Following scatter diagram shows the comparison between total units in each sector vis-a-vis new units opened in the last 3 financial years (except for food products sector which with 635 units is an outlier).

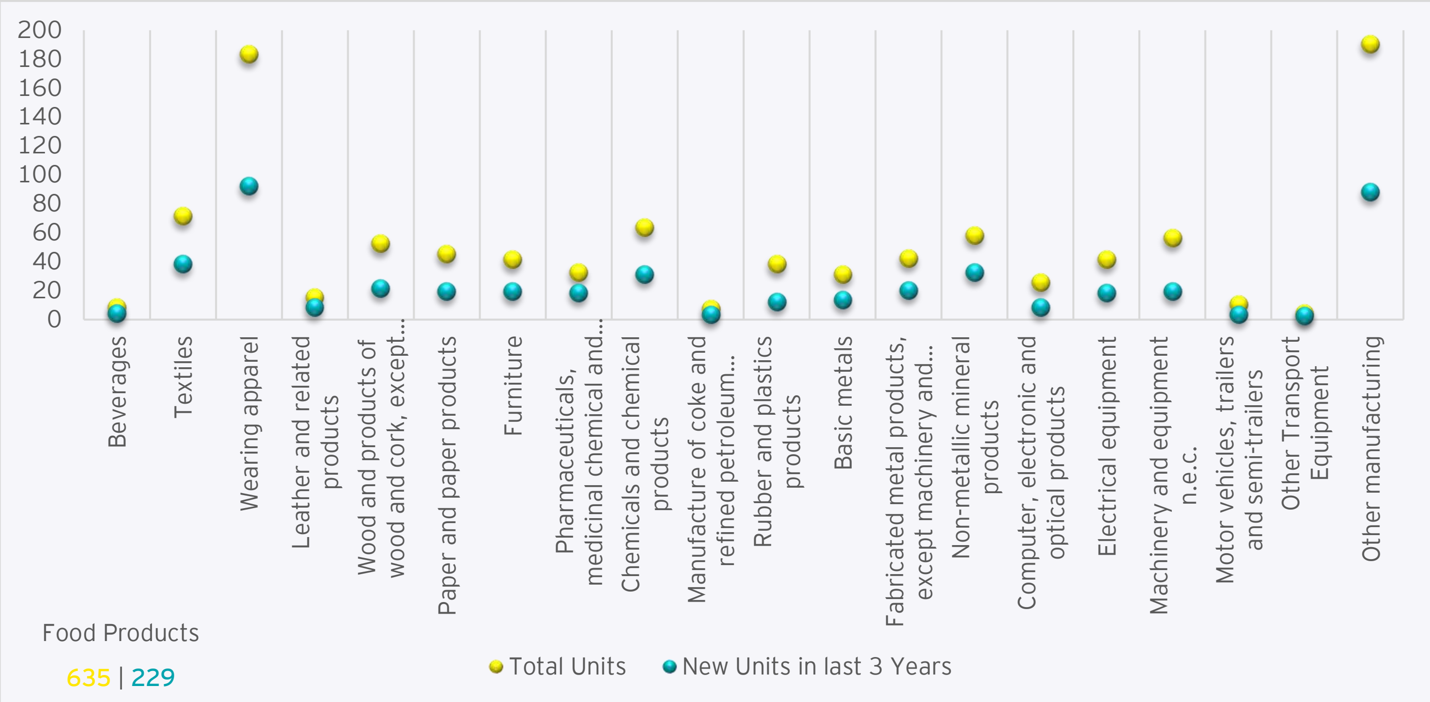


Figure 109: **[Kurukshetra]** Total Units & New Units in each Sector

2.1 Top 10 Sectors: Based on Number of Units

Following table shows top ten sectors in Kurukshetra, based upon the total number of MSME units in the district.

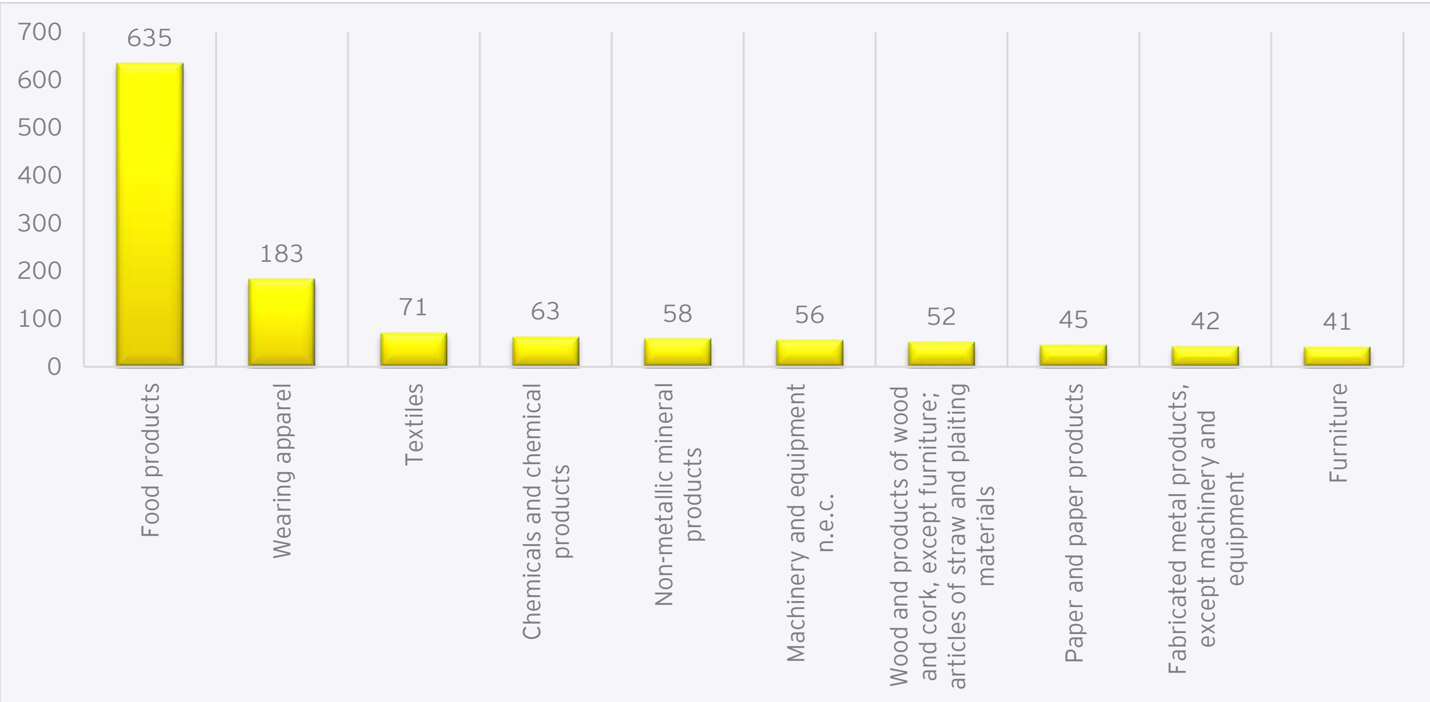


Figure 110: **[Kurukshetra]** Top 10 sectors - Total No. of MSME Units

2.2 Top 10 Sectors: Based on New Units in Last 3 Years

Following table shows the top ten sectors in Kurukshetra, based upon number of new MSME units set-up in the last three years.

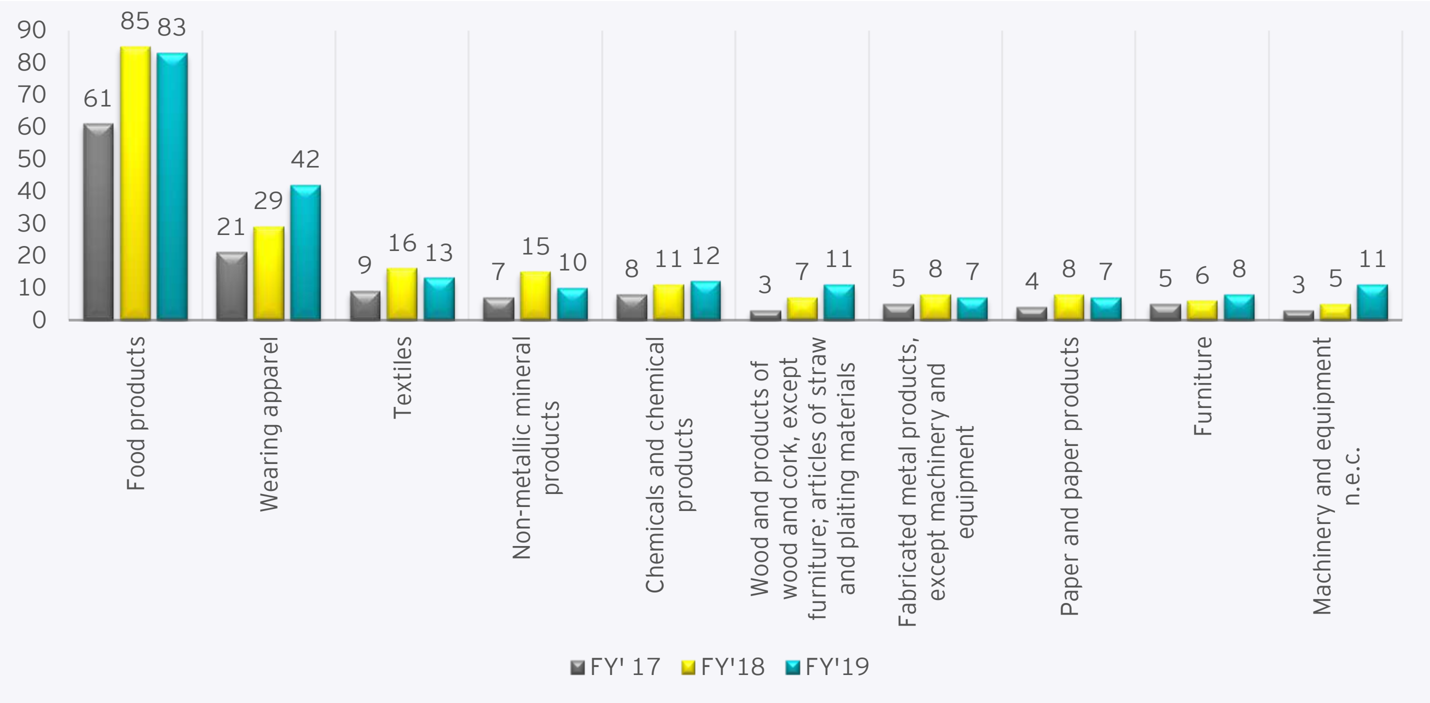


Figure 111: **[Kurukshetra]** Top 10 Sectors - New Units in Last 3 Years

Key Takeaways

- Maximum no. of MSME units in Kurukshetra are involved in the 'food products' sector (635), followed by wearing apparel (183).
- Apart from food products & wearing apparel, textiles, chemical products & non-metallic mineral products have significant number of MSMEs operating out of Kurukshetra.
- In last three years also, 'food products' sector has seen maximum number of new MSME units opened (229), followed by wearing apparel (92) & textiles (38).
- In terms of percentage growth, pharmaceuticals sector has experienced impressive recent growth with 56.25% of the total units having opened up in the last 3 years, followed by non-metallic mineral products 55.17%.

3. SECTOR WISE INVESTMENT SCENARIO

Punjab National Bank is the convener bank of State Level Bankers' Committee (SLBC) in Haryana and also the district lead bank of Kurukshetra.

Following table shows the total investment by MSMEs in each sector in Kurukshetra, along with new investment in the last three financial years (figures are in Lakhs).

Table 111: **[Kurukshetra]** Total Investment by MSMEs

S. No.	Industry	Investment (INR Lakhs)				
		Total Investment	FY'17	FY'18	FY'19	New Investment (Last 3 Years)
Food, Beverages & Tobacco						
1	Food products	25759	2697	2757	2139	7593
2	Beverages	110	50	_	20	70
Textiles & Apparel						
3	Textiles	665	72	71	126	269
4	Wearing apparel	1107	125	127	201	453
Leather, Wood & paper						
5	Leather and related products	114	10	1	32	43
6	Wood and products of wood and cork, except furniture; articles of straw and plaiting materials	675	17	96	92	205
7	Paper and paper products	2290	87	406	144	637
8	Furniture	337	48	44	77	169
Pharma, Petro-Chemicals, Rubber products						
9	Pharmaceuticals, medicinal chemical and botanical products	373	41	17	105	163
10	Chemicals and chemical products	1007	77	155	99	331
11	Manufacture of coke and refined petroleum products	258	_	_	162	162
12	Rubber and plastics products	1391	15	35	519	569

Metals & Mineral Products						
13	Basic metals	859	155	22	29	206
14	Fabricated metal products, except machinery and equipment	633	27	87	129	243
15	Non-metallic mineral products	754	83	165	160	408
Electrical, Electronics & Machinery						
16	Computer, electronic and optical products	226	3	25	38	66
17	Electrical equipment	403	25	63	12	100
18	Machinery and equipment	1194	33	204	174	411
Automotive & Auto-Components						
19	Motor vehicles, trailers and semi-trailers	306	12	4	2	18
20	Other Transport Equipment	22	18	_	1	19
Other Manufacturing						
21	Other manufacturing	4646	711	758	1161	2630

Following scatter diagram shows a comparison of total MSME investment and new investment in the last 3 financial years, across different sectors of Kurukshetra (except for food products sector which is an outlier with high investments).

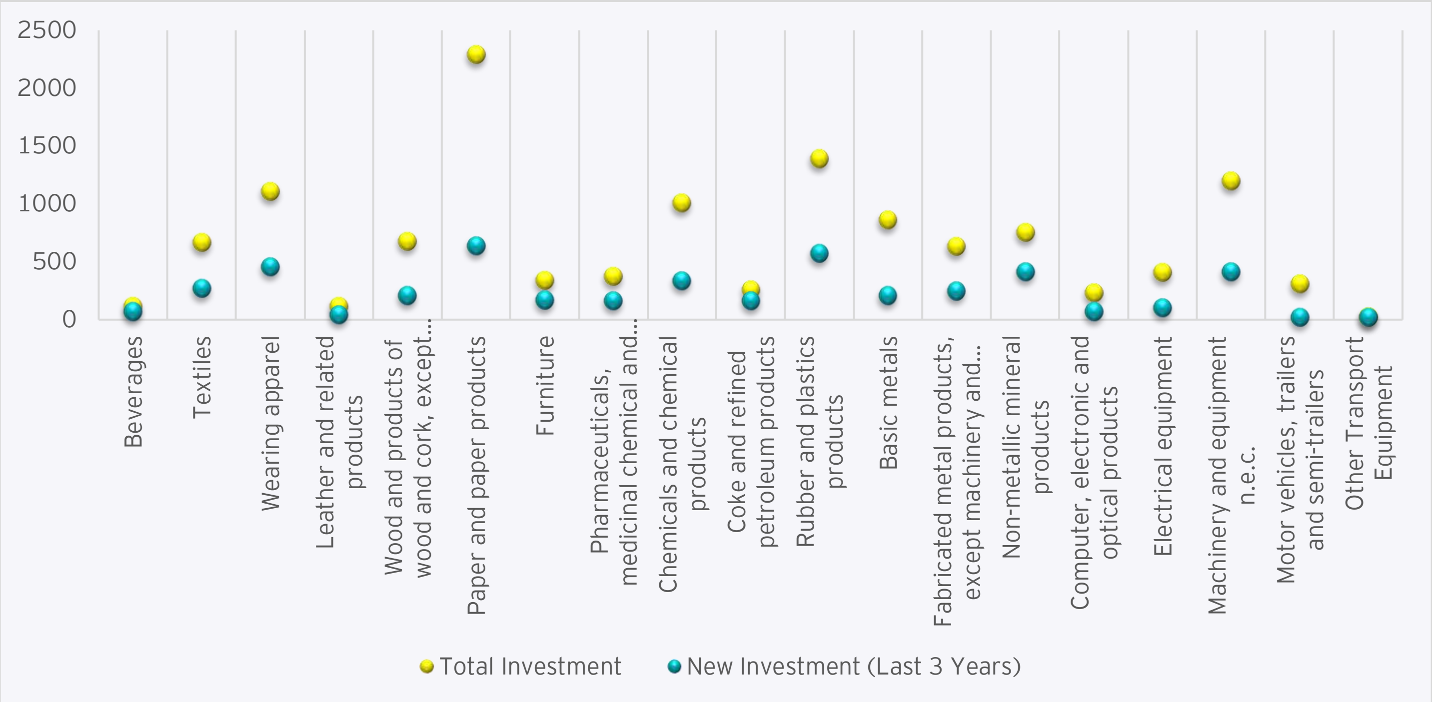


Figure 112: **[Kurukshetra]** Total Investment & New Investment in Last 3 Financial Years (FY'17-FY'19)

Following pie-chart showcases the sectors that have attracted maximum investments in the last 3 financial years (figures are in Lakhs).

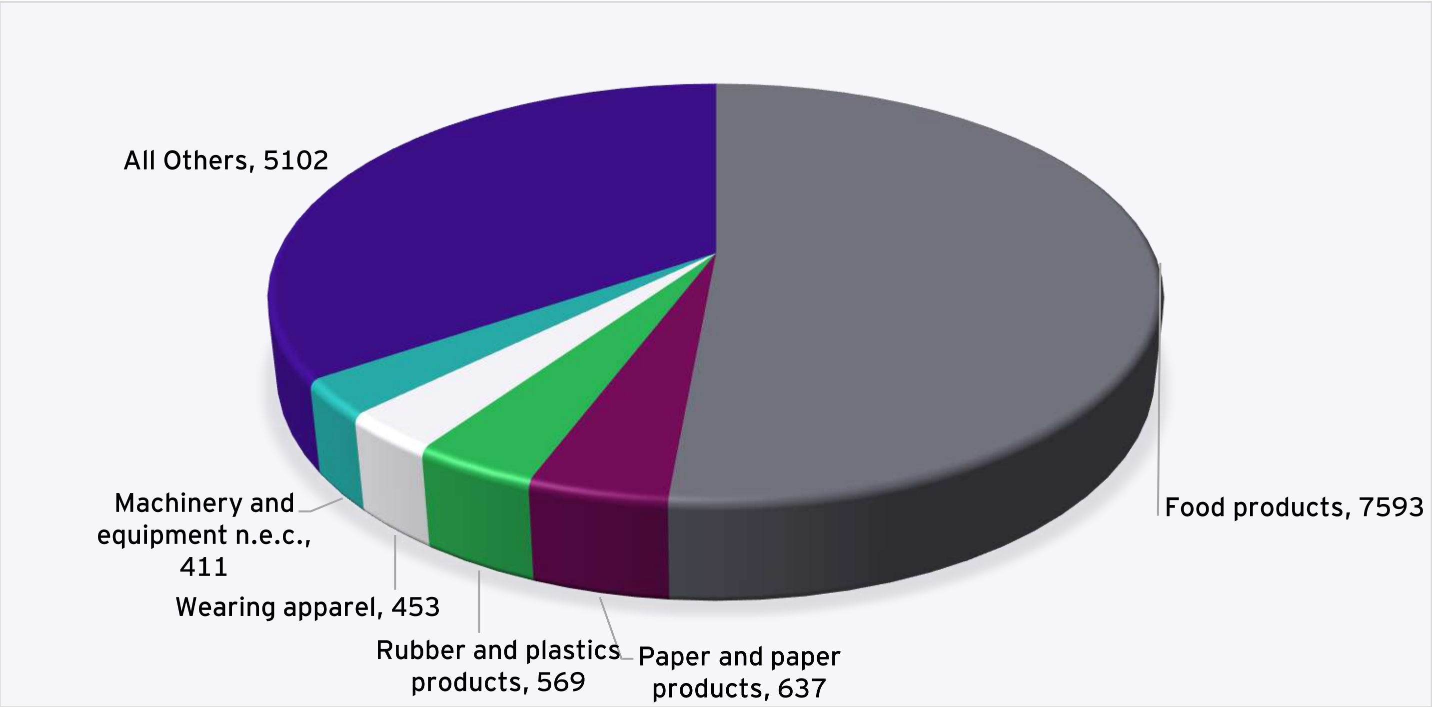


Figure 113: **[Kurukshetra]** Top 5 Sectors with maximum investment in last 3 Financial Years (FY'17-FY'19)

Following diagram shows a comparison of compound annual growth rate of various sectors for last three financial years (except for other transport equipment MSME sector, which having a new investment of INR 19 Lakhs in last three years out of a total investment of only INR 22 Lakhs has a high CAGR of 94.28%).

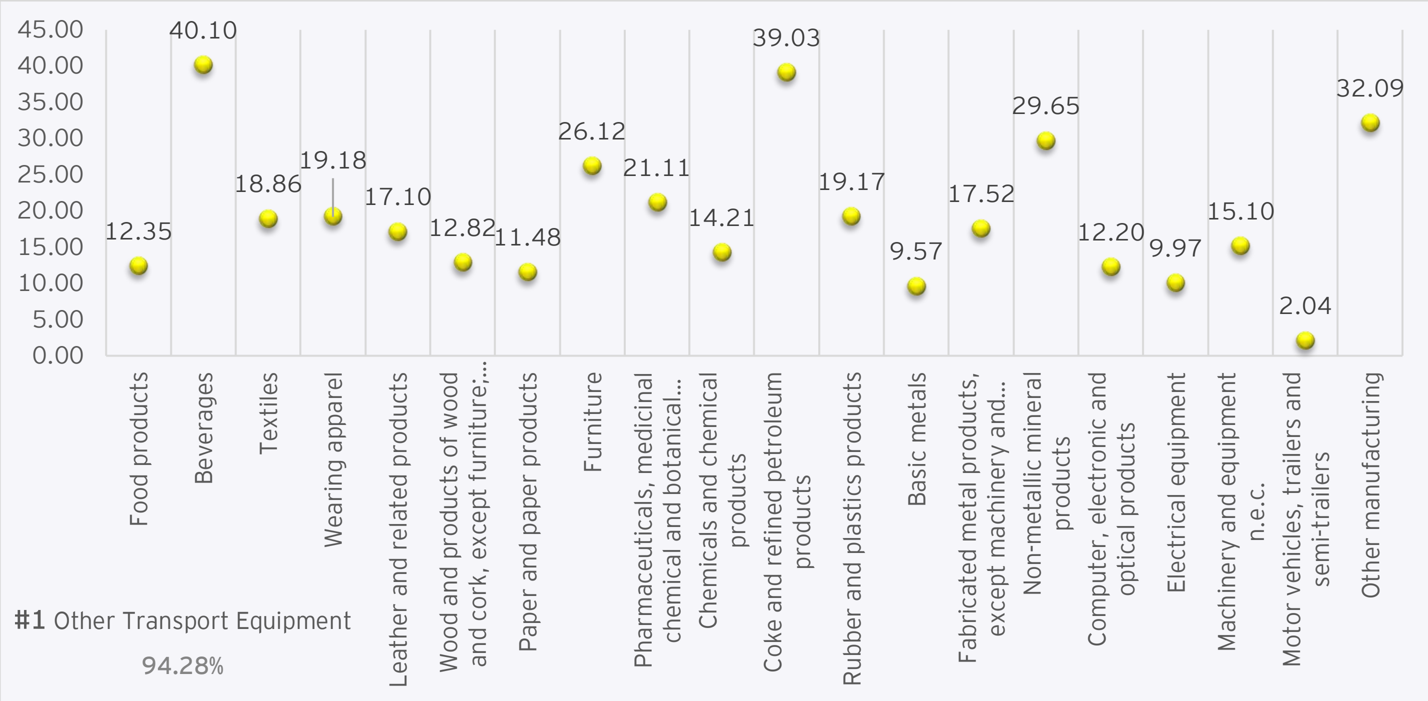


Figure 114: **[Kurukshetra]** CAGR for Last 3 Financial Years (FY'17-FY'19)

Key Takeaways

- Highest amount of investment by MSMEs in Kurukshetra has been in food products sector (257.59 Cr), followed by paper & paper products sector (22.90 Cr).
- Food Products sector apart from having the highest total investment (257.59 Cr), has also seen maximum investment in last three financial years (75.93 Cr) followed by the paper & paper products (6.37 Cr).
- As evident apart from food & paper, rubber & plastic products, wearing apparel, machinery & equipment have attracted the maximum investments in last three financial years.
- Sectors with high CAGR in MSME investments apart from other transport equipment in last 3 FYS are: beverages (40.10%), coke & refined petroleum products (39.03%), non-metallic minerals (29.65%), furniture (26.12%) & pharma (21.11%).

4. SECTOR WISE EMPLOYMENT SCENARIO

Below table showcases the total employment created by MSMEs in each of the sectors, along with new employment created in the last three financial years.

Table 112: **[Kurukshetra]** Total Employment in each Sector

S. No.	Industry	Total Employment	FY'17	FY'18	FY'19	New Employment (Last 3 Years)
Food, Beverages & Tobacco						
1	Food products	4068	417	571	399	1387
2	Beverages	61	24	_	11	35
Textiles & Apparel						
3	Textiles	279	29	51	50	130
4	Wearing apparel	563	60	76	111	247
Leather, Wood & paper						
5	Leather and related products	77	5	3	20	28
6	Wood and products of wood and cork, except furniture; articles of straw and plaiting materials	276	15	42	54	111
7	Paper and paper products	668	18	51	53	122
8	Furniture	219	31	29	49	109
Pharma, Petro-Chemicals, Rubber products						
9	Pharmaceuticals, medicinal chemical and botanical products	176	25	19	43	87
10	Chemicals and chemical products	304	40	60	35	135
11	Manufacture of coke and refined petroleum products	44	_	_	15	15
12	Rubber and plastics products	242	5	36	36	77
Metals & Mineral Products						
13	Basic metals	238	51	7	18	76
14	Fabricated metal products, except	214	12	30	30	72

	machinery and equipment					
15	Non-metallic mineral products	583	52	141	71	264
Electrical, Electronics & Machinery						
16	Computer, electronic and optical products	74	5	4	13	22
17	Electrical equipment	222	13	53	7	73
18	Machinery and equipment	407	17	81	50	148
Automotive & Auto-Components						
19	Motor vehicles, trailers and semi-trailers	70	8	3	1	12
20	Other Transport Equipment	51	3	_	1	4
Other Manufacturing						
21	Other manufacturing	889	82	164	205	451

Following scatter diagram shows a comparison of total employment across different MSME sectors and new employment generated in the last 3 financial years (except for food products sector with total employment of '4068' and new employment of '1387', which being an outlier cannot be represented with other sectors).

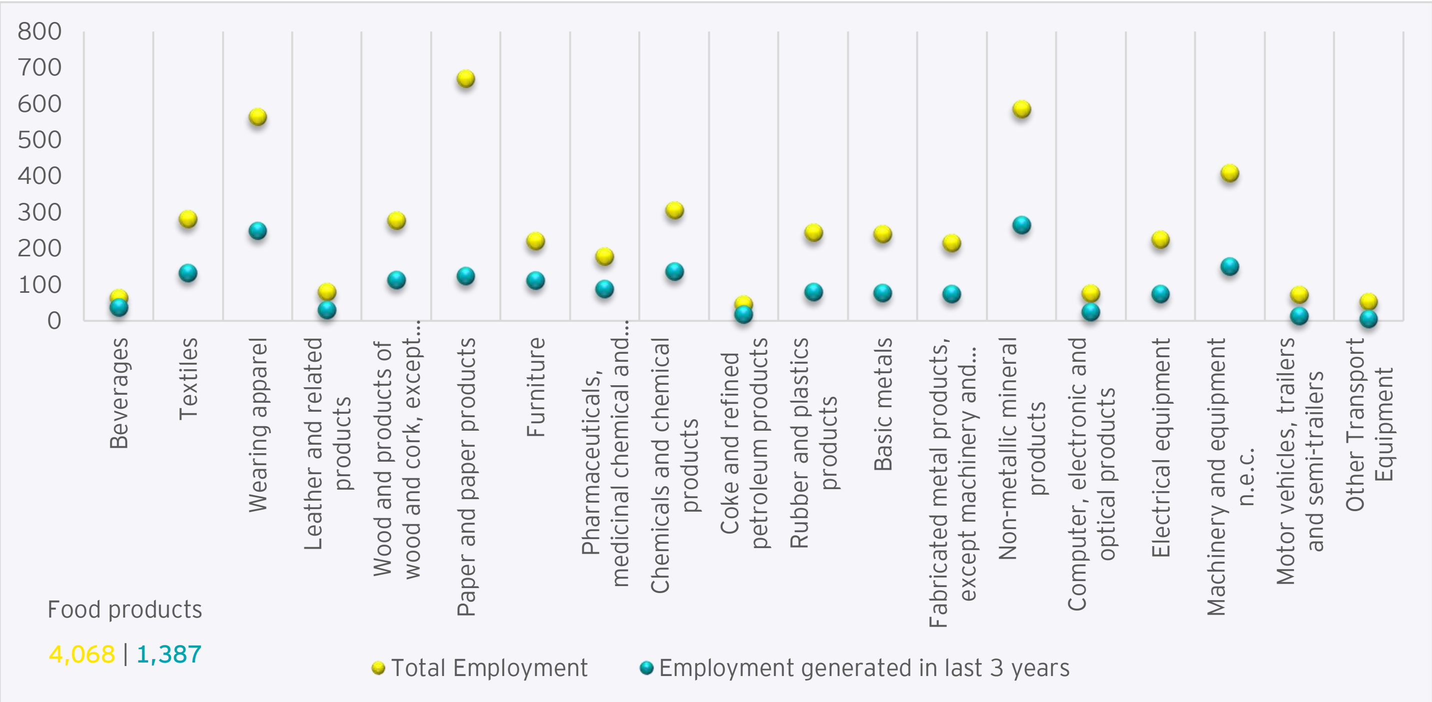


Figure 115: **[Kurukshetra]** Total Employment & New employment in last 3 Financial Years (FY'17-FY'19)

Following bar chart showcases category wise per unit employment analysis for MSMEs in Kurukshetra.

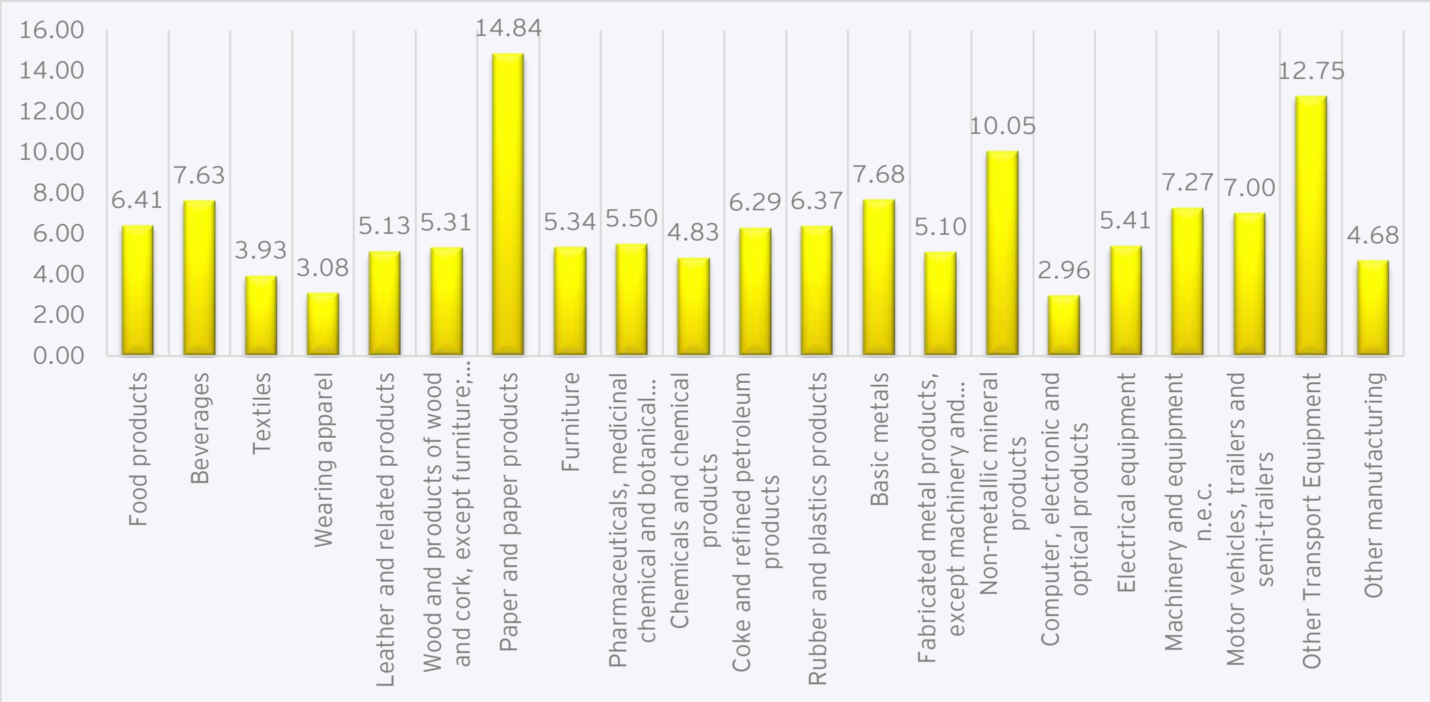


Figure 116: **[Kurukshetra]** Category wise employment intensity

Following pie-charts showcase the sectors that have created maximum employment in each of the last 3 financial years.

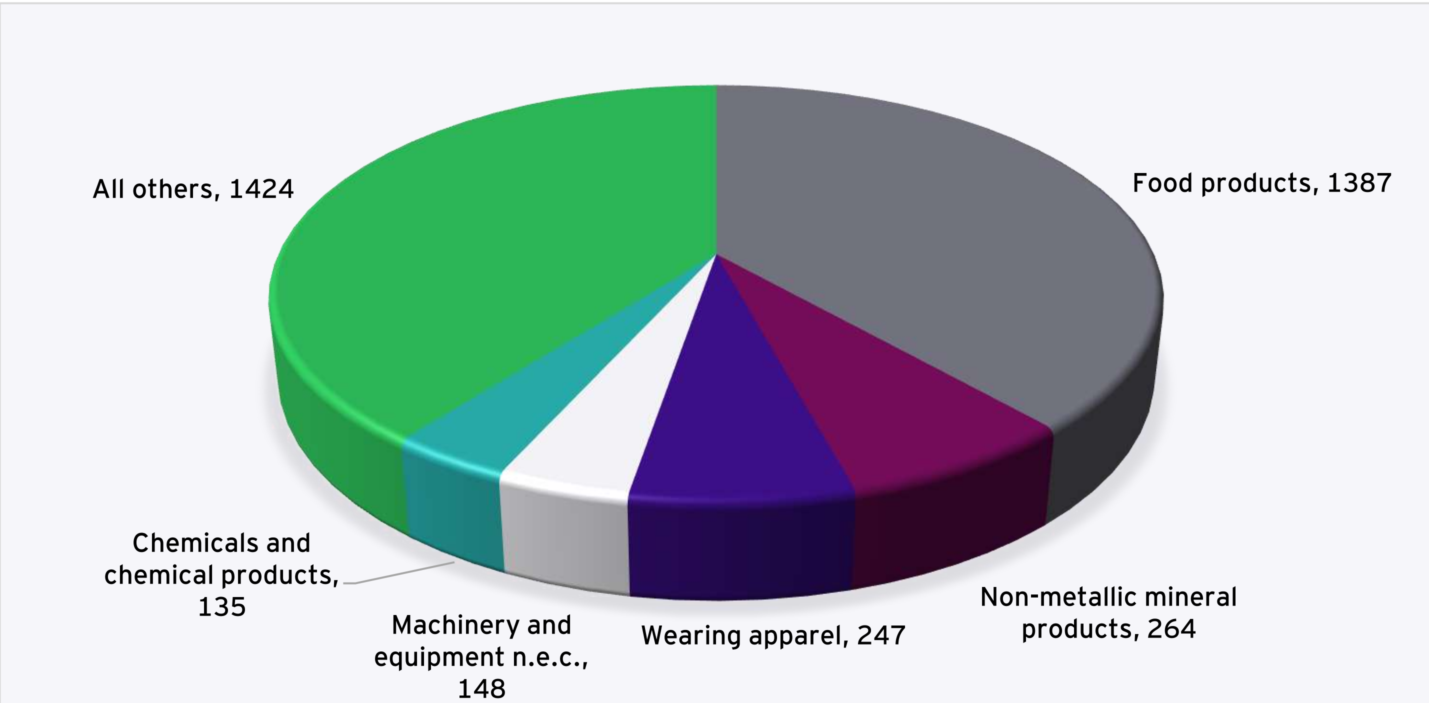


Figure 117: **[Kurukshetra]** Top 5 Sectors with maximum new employment in last 3 Financial Years (FY'17-FY'19)

Key Takeaways

- Food products MSME sector provides the maximum employment (4068) followed by paper & paper products sector (668) & non-metallic mineral products sector (583).

- Apart from food products sector, non-metallic mineral products sector has created the maximum new employment in last 3 years (264), followed by wearing apparel (247) and machinery & equipment (148). Sectors such as other transport equipment, motor vehicles, coke & refined petroleum products have experienced relatively low growth in new employment.

- Paper & paper products have maximum employment intensity with an average of 14.84 employees per unit, followed by other transport equipment with 12.75 employees per unit and non-metallic mineral products at 10.05 employees per unit.

- Computer, electronics & optical products has the least employment intensity with only 2.96 employees per unit, followed by wearing apparel at 3.08 employees per unit.

- Food products sector has created the maximum employment in Kurukshetra in last three financial years (1387), followed closely by non-metallic products (264). Other sectors in top 5 in terms of employment creation are wearing apparel (247), machinery & equipment (148), chemicals & chemical products (135).

5. EXPORTS FROM THE DISTRICT

Key exports products from Kurukshetra include food products (primarily from various rice mills located in the district) and paper & paper products. Following table shows some of the exports from Kurukshetra for last 3 FYs.

(The export data in the table shows only exports related information that is available at the District Industries Centre, Kurukshetra, and actual exports figure might be significantly higher).

Table 113: Exports from Kurukshetra

S. No.	Industry	Exports (INR Lakhs)		
		FY'17	FY'18	FY'19
1	Manufacture of food products	27492.23	36742.1	52963.26
2	Paper and paper products	–	48.42	62.67

6. NATURAL RESOURCES & RAW MATERIAL AVAILABLE

Raw materials available in Kurukshetra include Saltpetre (nitrates of calcium, potassium, sodium) used in the manufacturing of fertilizers, chemical processes and matches & fireworks. Other Raw materials available are brick earth used in the manufacturing of bricks in various brick-kilns around the district and ordinary clay.

Kurukshetra has a total forest cover of around 45.2 sq. km and the main flora consists of Neem, Jhar, Babul, Tut, Jand, Dhak etc. Plain areas of Kurukshetra also have Kikar, Aam, Peepal, Badh, Safeda, Shisham etc.

Key Agricultural produce of the district include Kharif crops such as sugarcane, maize, paddy, maize, oilseeds, kharif vegetables and rabi crops such as wheat, mustard, onion, potato & other vegetables.

7. KEY INDUSTRIAL ESTATES

Kurukshetra has only one industrial area located in Sector 2, Kurukshetra, with a total of 93 plots, all of which have been allocated.

8. MAJOR LARGE-SCALE UNITS

Kurukshetra currently has only 1 large enterprise and details of the same are shared below.

Table 114: **[Kurukshetra]** Large & Mega Units in each Sector

S. No.	Industry	Number	Names of Large & Mega Units
1	Paper & Paper Products	1	SAINSONS Paper Industries Pvt. Ltd.

9. SERVICES SECTOR SNAPSHOT

Kurukshetra has significant number of MSMEs operating in the services sector also.

Below table gives a snapshot of the services sector in Kurukshetra:

Table 115: **[Kurukshetra]** Services Sector Snapshot

S. No.	Industry	Total Units	Micro	Small	Medium	Total Investment (INR Lakhs)	Total employment
1	Civil Engineering	20	15	5	-	717	159
2	Construction of building	32	28	4	-	306	227
3	Electricity, gas, steam and air conditioning supply	21	21	-	-	145	86
4	Office administrative, office support and other business support activities	209	195	14	-	1408	625
5	Other professional, scientific and technical activities	136	122	13	1	1281	468
6	Repair and installation of machinery and equipment	65	54	11	-	780	377
7	Specialized construction activities	47	41	6	-	747	240
8	Architecture and engineering activities; technical testing and analysis	24	21	3	-	122	62
9	Financial service activities, except	47	46	1	-	182	100

	insurance and pension funding						
10	Food and beverage service activities	239	200	39	-	2482	821
11	Mining support service activities	2	1	1	-	21	15
12	Repair of computers and personal and household goods	108	105	3		440	255
13	Warehousing and support activities for transportation	88	52	31	5	3954	526
14	Water collection, treatment and supply	11	8	3	-	154	44
15	Computer programming, consultancy and related activities	93	87	6	-	379	268
16	Human health activities	70	55	14	1	1235	398
17	Information service activities	43	42	1	-	142	134
18	Real estate activities	33	27	6	-	223	122

10. CLUSTERS SCENARIO

Kurukshetra currently has only one cluster under the Haryana State mini cluster development scheme: 'Cattle Feed Cluster, Kurukshetra' and the Detailed Project Report for the same has been prepared and approved by the State Govt.

11. INDUSTRY ASSOCIATIONS

Following is the list of Industry Associations in Kurukshetra:

Table 116: Industry Associations in Kurukshetra

S. No	Name of Industries Association	Name of President and General Secretary	Contact	Email
1	Haryana Chamber of Commerce & Industry, Kurukshetra	Sh. Rajender Singhal, President Sh. N.P. Gupta, General Secretary	09992222482 9812020924	krindogerman@hotmail.com
2	Rice Miller Association C/O M/s Singla Rice & Gen. Mills,Salarpur Road, Kurukshetra	Sh Jwel Singla, President	9896980002	singlarice61@gmail.com
3	Kurukshetra Industrial Association, C/o M/s Vishal Pharma, Plot No. 25-26, Sector 2, Industrial Area, Kurukshetra	Sh. Joginder Mehta, President	9034120522	vishalpharmakkr@yahoo.co.in
4	Rice Miller Association C/o M/s Jai Shiv Shankar Rice Mill, G.t Road Shahabad	Sh. Rakesh Garg, President	9812338928	garg29@yahoo.com
5	Rice Miller Association C/o M/s Bansal Rice Mills Babain	Sh. Brij Bhushan, President	9812027235	ankushbans1984@gmail.com
6	Rice Miller Association C/o Madan Dhawan & Sons Ladwa	Sh. Parmod Dhawan, President	9812594390	dhavanji91@gmail.com
7	Rice Miller Association, Shop No-101& 102, Anaj Mandi Pehowa	Sh. Janak Raj, President	9416080745	krishanlalsaini2014@gmail.com
8	Rice Miller Association C/o M/s Bansal Rice Mills Ismailabad	Sh. Satish Bansal, President	9416037204	bansalricemill471@gmail.com
9	Papneja Rice Mill Ismailabad	Sh. Vinod Papneja, President	9416088506	vinodpapneja00@gmail.com
10	Bricks Association, Kurukshetra	Sh. Ashwani Arora, President	9355536846	ashwaniarorabko@gmail.com
11	Haryana State Cold Storage, Kurukshetra	Sh. Baldev Singh, General Secretary	9416733830	sameersethi@msn.com

12. KEY ISSUES OF THE INDUSTRIES

Following are some of the key issues raised by the Industry in Kurukshetra:

- Sector 2 & Sector 3 of Kurukshetra were initially marked as Industrial plots but later more than 80% of the said area was converted in to residential plots reducing the scope for expansion of Industry.
- With State govt. planning to build a new Industrial area in Kurukshetra, the Kurukshetra Industry has requested to build the new Industrial area along NH44 for ease of connectivity.
- Industry requests for allotment of plots at concessional rates to enable Kurukshetra Industry to flourish.
- Kurukshetra Industry has also requested for assistance from DIC in obtaining loans at reasonable rates.
- Need for development of commercial area in Sector 2 Kurukshetra.

13. POTENTIAL AREAS OF INTERVENTION

- Development of a new Industrial area in Kurukshetra.
- Proactive facilitation by DICs to help interested Industrialists & entrepreneurs obtain land/ plots for expanding or setting up of new industry.
- Assistance/Guidance to Industrialists in obtaining finance for their projects at best possible market rates.
- Effective information dissemination among the Kurukshetra Industrialists regarding various schemes of Govt. of Haryana & Govt. of India to promote Industry.

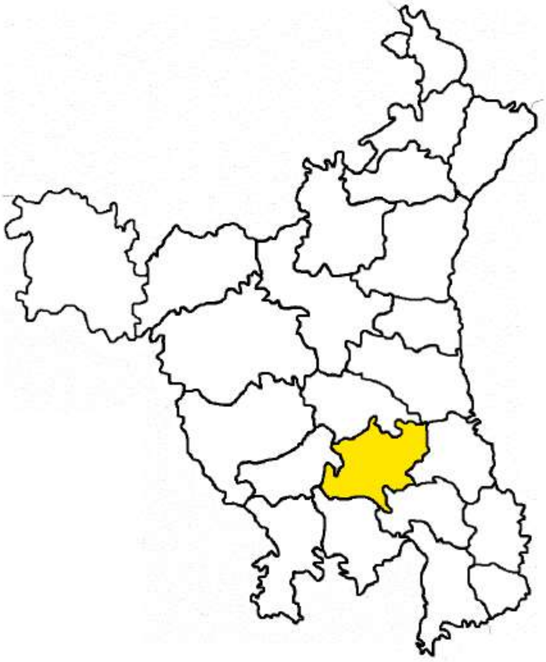
14. POTENTIAL AREAS OF INVESTMENT

- One of the major sectors in Kurukshetra is 'Food Products Sector' with a total of 635 units, 229 of whom have started commercial production in last three years only. The sector already has a high total investment of INR 257.59 Cr with almost 76 Cr new investment in last 3 years. There is significant opportunity for investment in ancillary support to these units such as Marketing & Branding services, Exports Consultancy services, cold/storage warehousing services, downstream food products industries etc.

- 'Chemical & chemical products' is another fast-growing industry in Kurukshetra with 63 units in total currently, almost 50% of whom (31) have started operation in last 3 years only. There is a very attractive opportunity in upstream products which can act as raw material suppliers to these units or investment towards forward linkages for these units.

14. Jhajjar

District Profile



EXECUTIVE SUMMARY

District Profile

MSME Scenario

14

Jhajjar

Famous for….
"Footwear Industry"

1 MSMEs in Jhajjar

- Total number of MSME units: **1,616**
- New MSME units (last 3 years): **633**

Top 5 sectors – Maximum number of MSMEs:
- Wearing Apparel
- Leather & related Products
- Machinery & Equipment
- Rubber & plastic products
- Chemicals & chemical products

2 Investment Scenario in Jhajjar

- Total Investment (INR Lakhs): **1,21,685**
- New Investment (last 3 years; INR Lakhs): **26,038**

Top 5 sectors – Maximum investment by MSMEs:
- Rubber & Plastics products
- Leather & related products
- Fabricated Metal
- Machinery & Equipment
- Textiles

3 Employment Scenario in Jhajjar

- Total Employment: **38,838**
- New Employment (last 3 years): **6,638**

Top 5 sectors – Most employment generated:
- Rubber & Plastics products
- Leather & related Products
- Fabricated Metal
- Machinery & Equipment
- Chemicals & chemical products

4 Potential for MSMEs

- Footwear industry in Bahadurgarh offers significant scope for investment towards leather processing value chain facilities in the district which can supply required raw materials to these units
- Rubber & plastic products is a fast growing industry in the district and offers investment opportunity in product diversification and raw materials processing

5 Others

- Total Exports (FY 18-19; INR Lakhs): **1,22,684**
- Number of Large & Mega units: **24**
- Existing Clusters: **1 MSE-CDP Cluster**

1. INTRODUCTION

Jhajjar came into existence on 15 July, 1997 and was carved out of district Rohtak. The district is believed to have derived its name from Jharnaghar, a naturally occurring fountain. The district has a rich historical heritage and has significant presence of historical landmarks, building, etc.

1.1 Geography

Jhajjar falls in the south-eastern part of Haryana, and is situated 65 kms away from Delhi. It is surrounded by district Rohtak in the north, district Rewari in the south and district Bhiwani on the west. The district shares its eastern border with the National Capital of India.

The district falls under arid and semi-arid zones and is marked by hot summer, cold winter and little rain fall. Due to uneven areas, it often gets waterlogged during the monsoon season.

1.2 Demographic Profile

As per the 2011 census, Jhajjar's total population is 9.58 lakh persons across an area of 1,834 sq. km. Jhajjar district has a population density of 523 persons per sq. km, which is up from 480 persons per sq. km. in 2001. The population growth rate for Jhajjar in the last decade (2001-2011) was 8.90%. Jhajjar has an above average literacy rate of 80.65%. The district's sex ratio is lower than the national average of 940 and state average of 879, i.e. 862 females per thousand males.

1.3 Administrative Set-up

Jhajjar has four sub-divisions (Badli, Bahadurgarh, Beri, Jhajjar), five tehsils (Badli, Bahadurgarh, Beri, Jhajjar, Matanhail), one sub-tehsil (Salhawas) and six blocks (Badli, Bahadurgarh, Beri, Jhajjar, Matanhail, Salhawas).

The district Jhajjar comes under the administrative control of Rohtak division. The overall charge of the general administration lies with the Deputy Commissioner. He also performs the role of District Magistrate and the District Collector.

The following table shows categorization of blocks as per the status of industrial development.

Table 117: **[Jhajjar]** Categorization of Blocks

Block A	Block B	Block C	Block D
Bahadurgarh	Jhajjar	Beri	Sahalwas
	Matenhail	Badli	

2. SECTOR WISE MSME LANDSCAPE

Following table shows the total number of MSME units in each sector, in Jhajjar, along with the bifurcation of number of micro, small and medium enterprises.

The table also shows number of new units that started their commercial production in the last three financial years.

Table 118: **[Jhajjar]** No. of MSME Units in each Sector

S. No.	Industry	Total Units	Micro	Small	Medium	FY'17	FY'18	FY'19	New Units (Last 3 Years)
Metals & Mineral Products									
1	Basic metals	59	30	26	3	7	7	9	23
2	Fabricated metal products, except machinery & equipment	80	35	43	2	8	9	5	22
3	Non-metallic mineral products	41	27	13	1	2	11	7	20
Food, Beverages & Tobacco									
4	Beverages	6	2	4	0	2	2	1	5
5	Food products	70	51	19	0	11	14	15	40
6	Tobacco products	2	1	1	0	0	0	0	0
Pharma, Petro-Chemicals, Rubber products									
7	Chemicals & chemical products	97	60	35	2	10	10	8	28
8	Pharmaceuticals, medicinal chemical & botanical products	28	22	5	1	0	1	2	3
9	Rubber & plastics products	164	62	99	3	6	18	25	49
Electrical, Electronics & Machinery									
10	Computer, electronic & optical products	12	6	5	1	1	1	2	4
11	Electrical equipment	51	31	19	1	6	8	4	18
12	Machinery & equipment n.e.c.	121	63	52	6	7	11	5	23
Leather, Wood & paper									
13	Furniture	21	16	4	1	0	4	4	8
14	Leather & related products	228	66	147	15	24	18	15	57
15	Paper & paper products	69	38	31	0	6	11	3	20
16	Wood & products of wood and cork,	33	17	15	1	7	4	2	13

	except furniture; Articles of straw and plaiting materials								
Automotive & Auto-Components									
17	Motor vehicles, trailers & semi-trailers	27	7	20	0	6	1	2	9
18	Transport equipment	8	4	4	0	0	0	2	2
Textiles & Apparel									
19	Textiles	52	20	32	0	9	4	7	20
20	Wearing apparel	200	189	9	2	4	8	175	187
Other manufacturing									
21	Repairs & Maintenance	26	22	0	4	4	5	6	15
22	Other manufacturing	221	146	72	3	16	33	18	67

Following scatter diagram shows the comparison between total units in each sector vis-a-vis new units opened in the last 3 financial years.

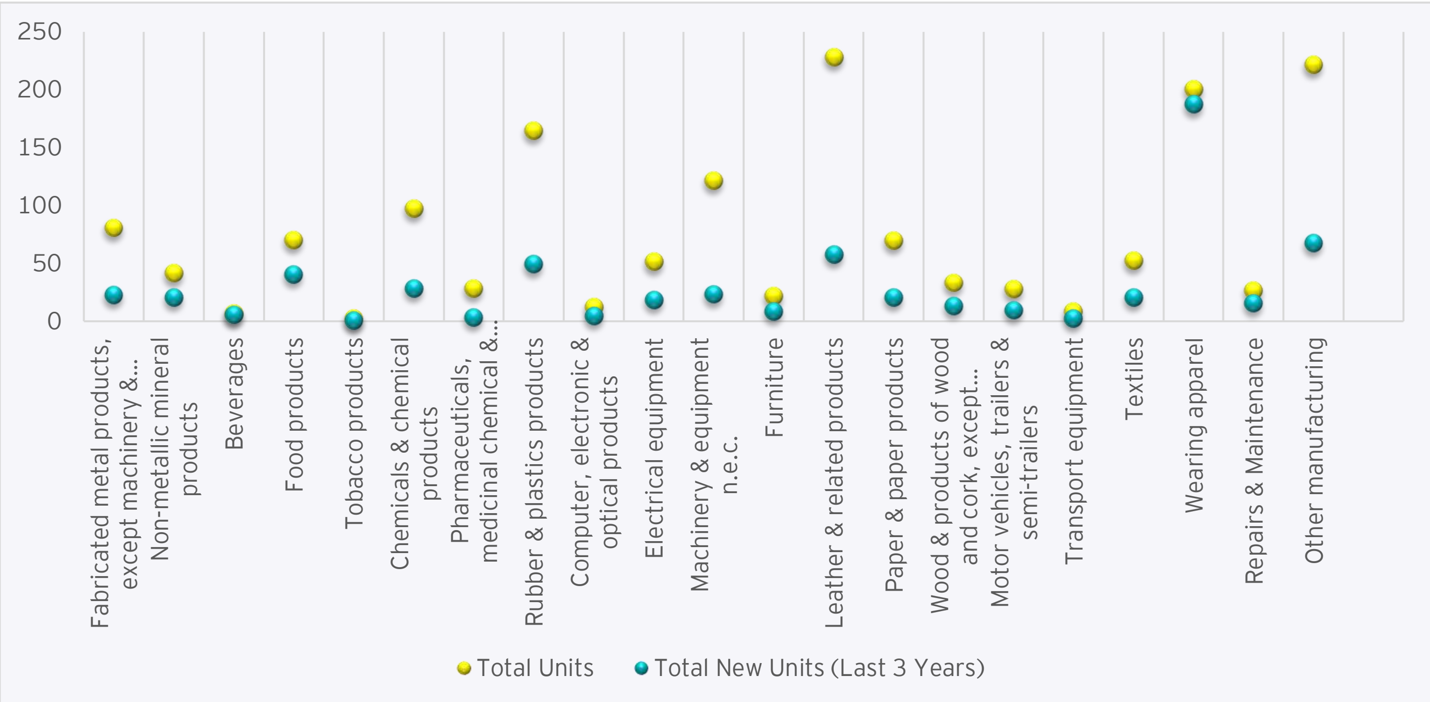


Figure 118: **[Jhajjar]** Total Units & New Units in each Sector

2.1 Top 10 Sectors: Based on Number of Units

Following table shows top ten sectors in Jhajjar, based upon the total number of MSME units in the district.

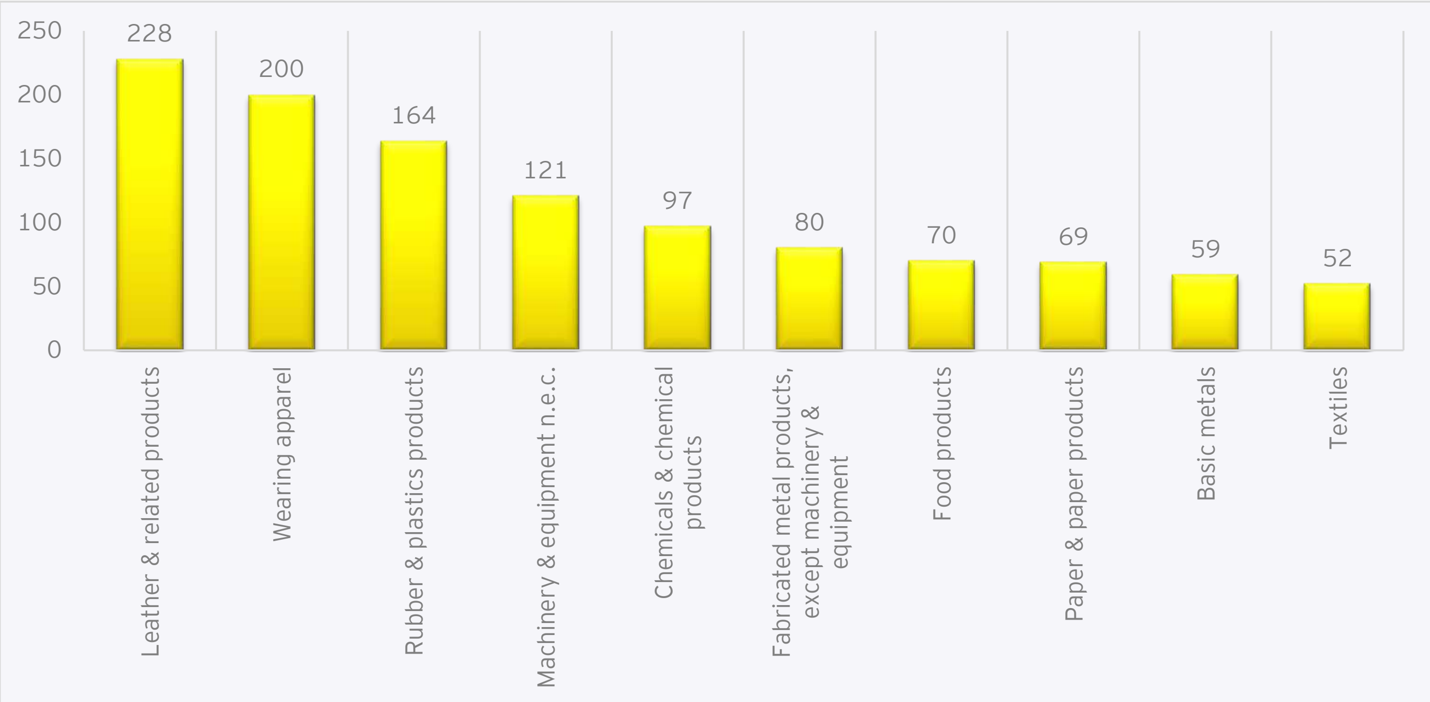


Figure 119: **[Jhajjar]** Top 10 sectors - Total No. of MSME Units

2.2 Top 10 Sectors: Based on New Units in Last 3 Years

Following table shows the top ten sectors in Jhajjar, based upon number of new MSME units set-up in the last three years.

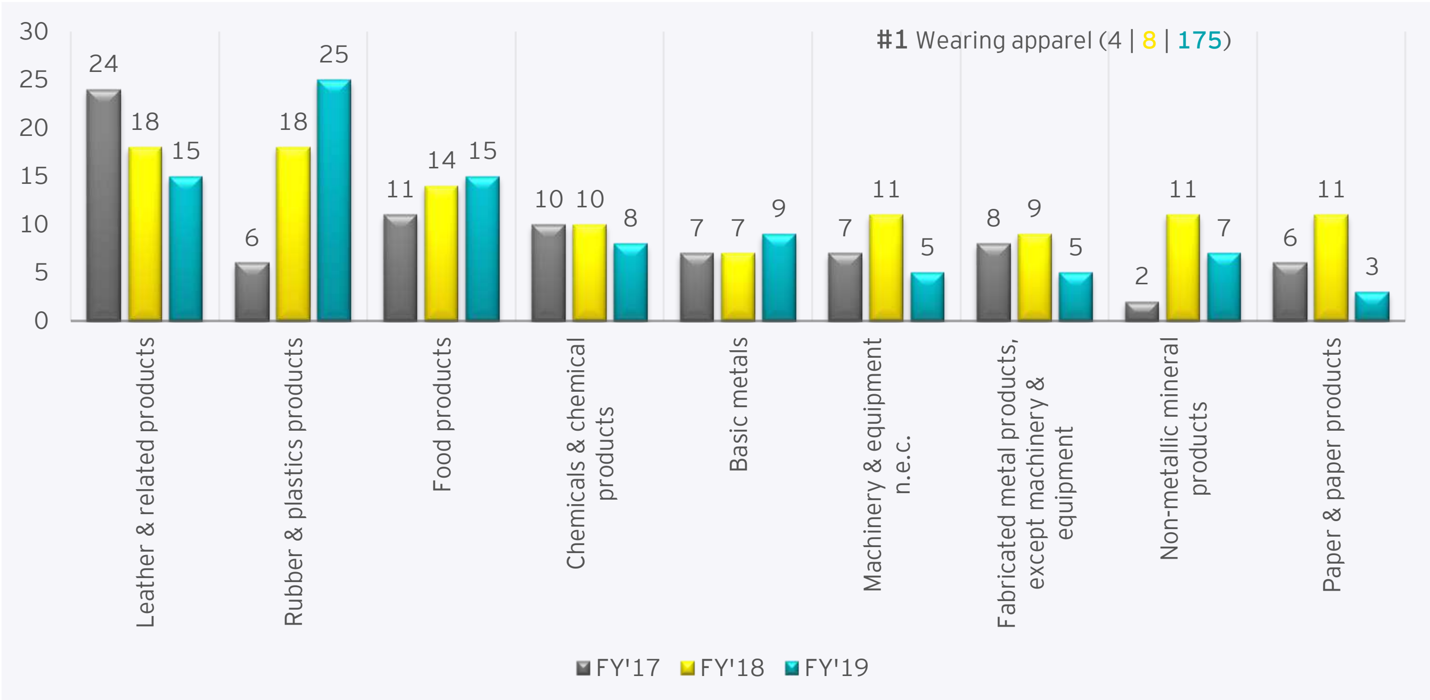


Figure 120: **[Jhajjar]** Top 10 Sectors - New Units in Last 3 Years

Key Takeaways

- Maximum number of MSME units in Jhajjar are involved in the leather and related product sector, followed by apparels.
- In the last three years as well, apparels sector has seen maximum number of new MSME units opened (187), followed by leather & related products (57) and rubber & plastic products (49).
- In terms of the percentage growth, apparels and beverages have experienced impressive recent growth with 94% and 83% of the total units having opened-up in the last 3 years respectively.

3. SECTOR WISE INVESTMENT SCENARIO

Punjab National Bank is the convener bank of State Level Bankers' Committee (SLBC) in Haryana and also the district lead bank of Jhajjar.

Following table shows the total Investment by MSMEs in each sector in Jhajjar, along with new investment in the last three financial years.

Table 119: **[Jhajjar]** Total Investment by MSMEs

S. No.	Industry	Investment (INR Lakhs)				
		Total Investment	FY'17	FY'18	FY'19	New Investment (Last 3 Years)
Metals & Mineral Products						
1	Basic metals	5,805	758	604	180	1,542
2	Fabricated metal products, except machinery & equipment	7,155	340	502	445	1,287
3	Non-metallic mineral products	1,709	61	111	63	235
Food, Beverages & Tobacco						
4	Beverages	231	63	63	5	131
5	Food products	1,974	633	314	123	1,070
6	Tobacco products	61	0	0	0	0
Pharma, Petro-Chemicals, Rubber products						
7	Chemicals & chemical products	5,396	290	220	140	650

8	Pharmaceuticals, medicinal chemical & botanical products	1,640	0	1	11	12
9	Rubber & plastics products	14,635	818	1,377	1,680	3,875
Electrical, Electronics & Machinery						
10	Computer, electronic & optical products	1,520	200	2	5	207
11	Electrical equipment	3,242	273	660	46	979
12	Machinery & equipment	9,751	761	483	1,105	2,349
Leather, Wood & paper						
13	Furniture	1,257	0	114	40	154
14	Leather & related products	36,246	1,973	2,368	497	4,838
15	Paper & paper products	3,875	436	342	33	811
16	Wood & products of wood and cork, except furniture; Articles of straw and plaiting materials	2,403	186	698	393	1,277
Automotive & Auto-Components						
17	Motor vehicles, trailers & semi-trailers	2,232	671	240	140	1,051
18	Transport equipment	414	0	0	45	45
Textiles & Apparel						
19	Textiles	6,142	1,572	358	657	2,587
20	Wearing apparel	2,709	33	79	244	356
Other manufacturing						
21	Repairs & Maintenance	458	45	25	45	115
22	Other manufacturing	12,830	551	904	1,012	2,467

Following scatter diagram shows a comparison of total MSME investment and new investment in the last 3 financial years, across different sectors of Jhajjar.

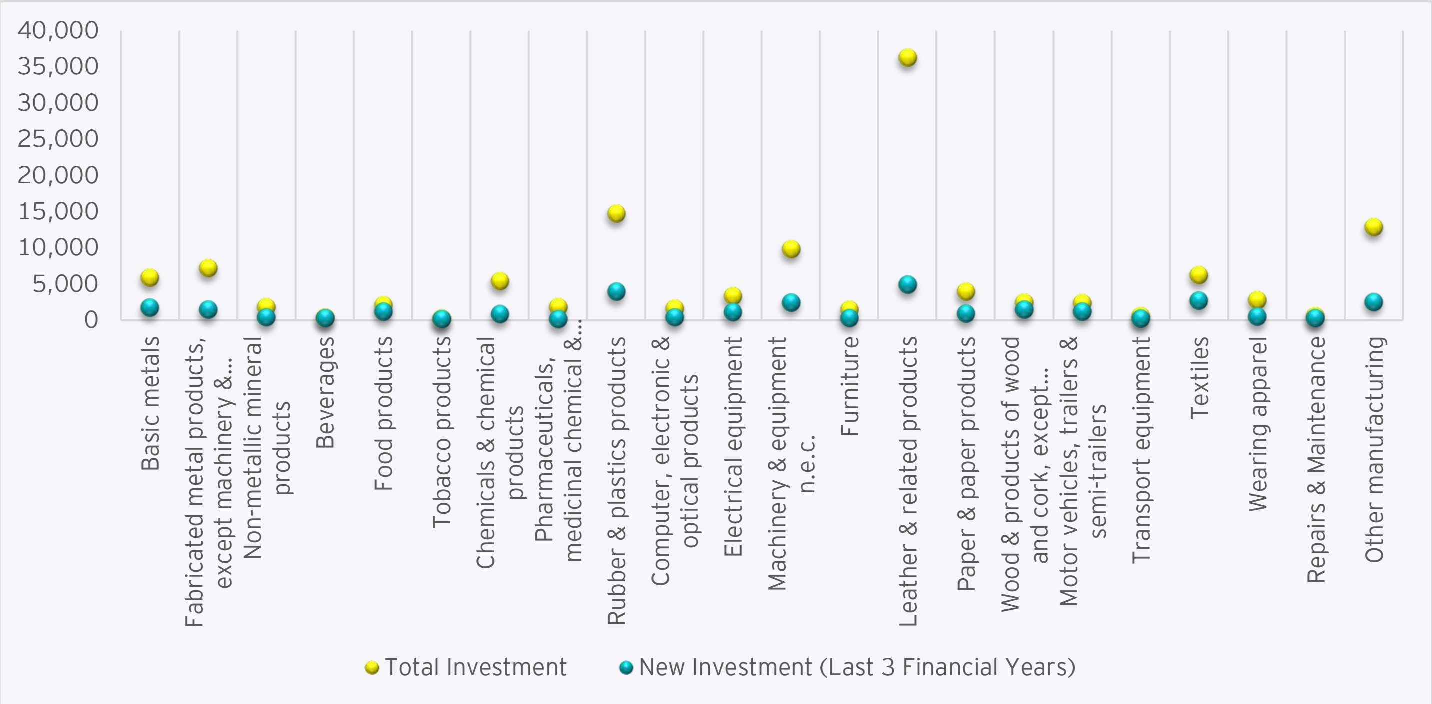


Figure 121: **[Jhajjar]** Total Investment & New Investment in Last 3 Financial Years (FY'17-FY'19)

Following pie-chart showcases the sectors that have attracted maximum investments in the last 3 financial years (figures are in Lakhs).

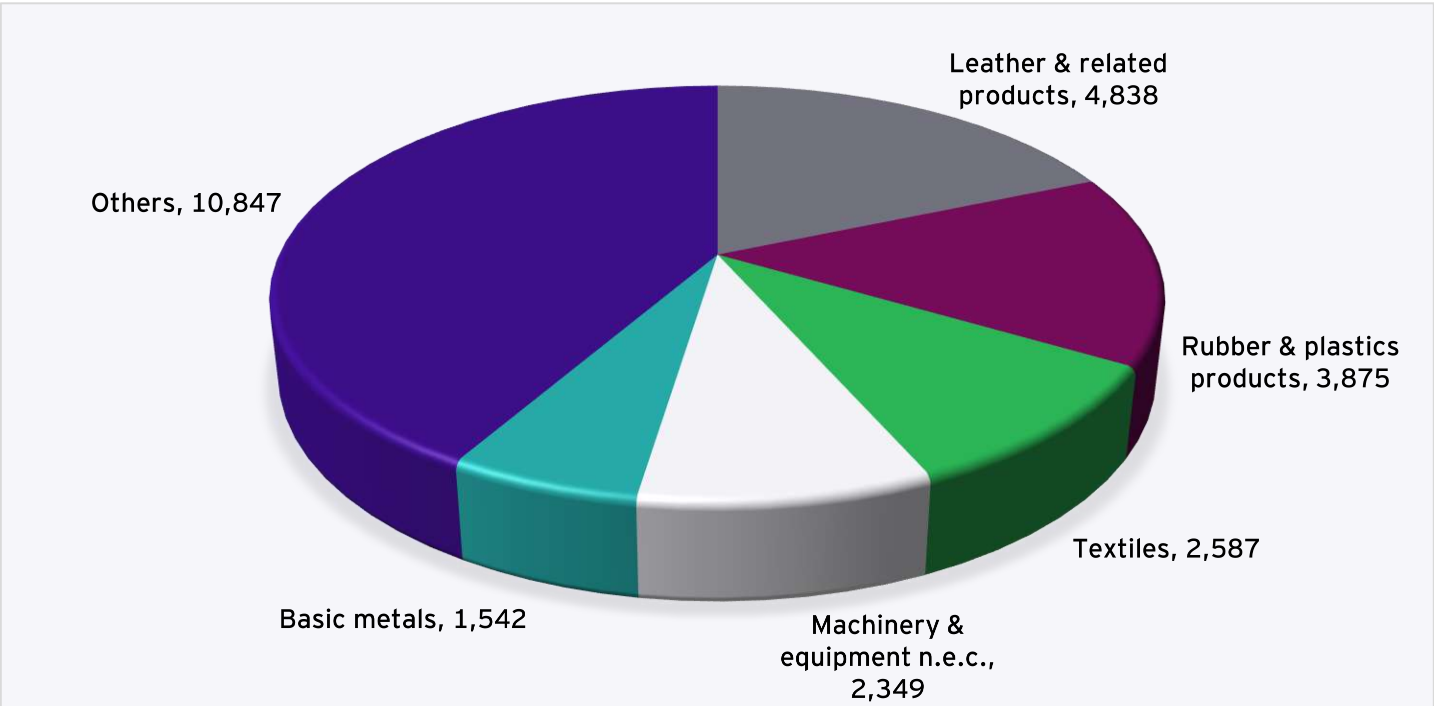


Figure 122: **[Jhajjar]** Top 5 Sectors with maximum investment in last 3 Financial Years (FY'17-FY'19)

Following diagram shows a comparison of compound annual growth rate of various sectors for last three financial years.

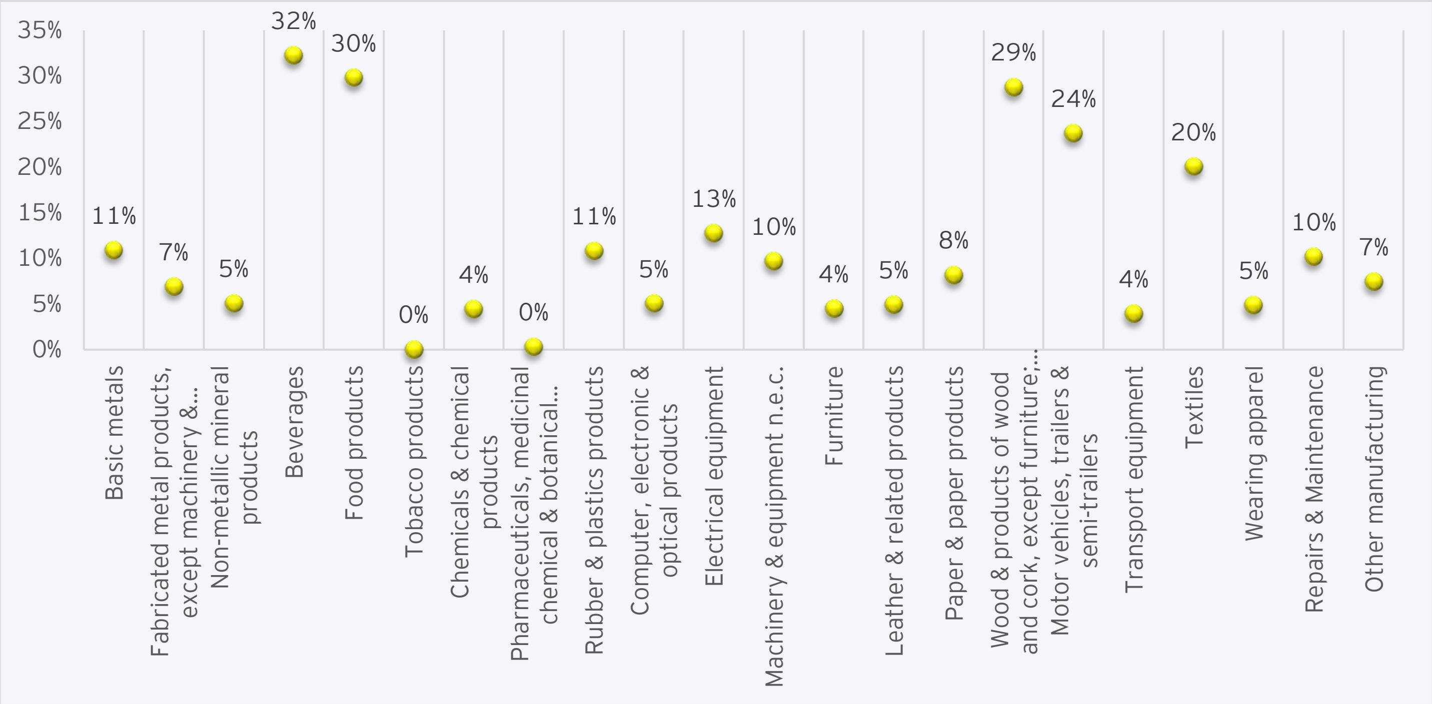


Figure 123: **[Jhajjar]** CAGR for Last 3 Financial Years (FY'17-FY'19)

Key Takeaways

- Highest amount of investment by MSMEs in Jhajjar has been in leather & related products sector (INR 362.46 Cr.), followed by rubber & plastic products sector (INR 146.35 Cr.).

- Besides being the sectors with highest total investment, leather & related products sector and rubber & plastic products sector also attracted maximum investment in the last three financial years (INR 48.38 Cr. and INR 38.75 Cr. respectively).

- Sectors with high CAGR in MSME investments in the last 3 FYs are: beverages (32%), food products (30%), wood & products of wood (29%), motor vehicles, trailers and semi-trailers (24%) and textiles (20%).

4. SECTOR WISE EMPLOYMENT SCENARIO

Below table showcases the total employment created by MSMEs in each of the sectors, along with new employment created in the last three financial years.

Table 120: **[Jhajjar]** Total Employment in each Sector

S. No.	Industry	Total Employment	FY'17	FY'18	FY'19	New Employment (Last 3 Years)
Metals & Mineral Products						
1	Basic metals	1,530	131	129	82	342
2	Fabricated metal products, except machinery & equipment	1,904	91	105	117	313
3	Non-metallic mineral products	672	34	85	34	153
Food, Beverages & Tobacco						
4	Beverages	36	8	14	4	26
5	Food products	694	84	62	63	209
6	Tobacco products	20	0	0	0	0
Pharma, Petro-Chemicals, Rubber products						
7	Chemicals & chemical products	1,762	57	253	41	351
8	Pharmaceuticals, medicinal chemical & botanical products	589	0	2	4	6
9	Rubber & plastics products	3,649	128	269	674	1,071
Electrical, Electronics & Machinery						
10	Computer, electronic & optical products	296	12	7	12	31
11	Electrical equipment	1,214	43	95	21	159
12	Machinery & equipment n.e.c.	2,904	70	188	219	477
Leather, Wood & paper						
13	Furniture	218	0	35	8	43
14	Leather & related products	13,228	543	659	256	1,458
15	Paper & paper products	1,143	93	60	8	161
16	Wood & products of wood and cork, except furniture; Articles of straw and plaiting materials	423	41	46	68	155
Automotive & Auto-Components						

17	Motor vehicles, trailers & semi-trailers	612	70	20	31	121
18	Transport equipment	214	0	0	45	45
Textiles & Apparel						
19	Textiles	1,744	169	119	113	401
20	Wearing apparel	1,206	21	38	212	271
Other manufacturing						
21	Repairs & Maintenance	201	30	34	30	94
22	Other manufacturing	4,579	303	324	124	751

Following scatter diagram shows a comparison of total employment across different MSME sectors and new employment generated in the last 3 financial years.

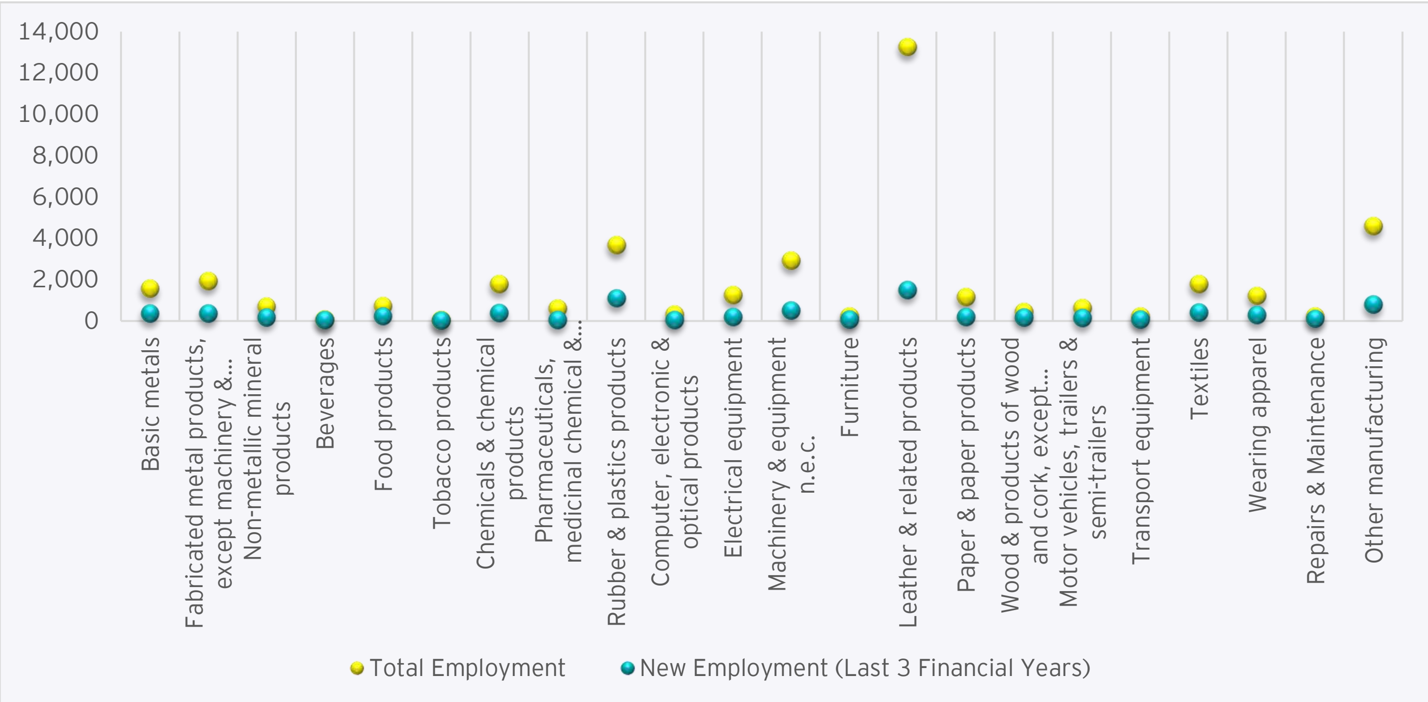


Figure 124: **[Jhajjar]** Total Employment & New employment in last 3 Financial Years (FY'17-FY'19)

Following bar chart showcases category wise per unit employment analysis for MSMEs in Jhajjar.

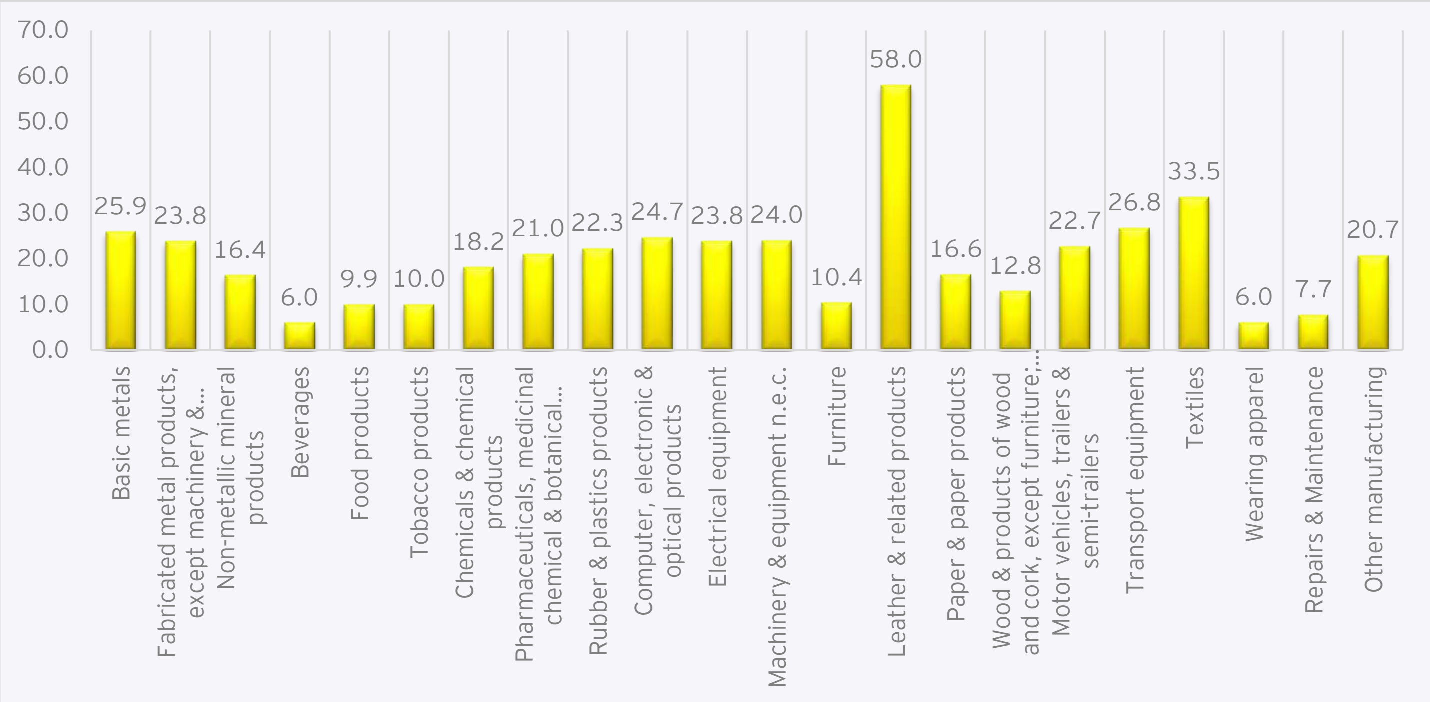


Figure 125: **[Jhajjar]** Category wise employment intensity

Following pie-charts showcase the sectors that have created maximum employment in each of the last 3 financial years.

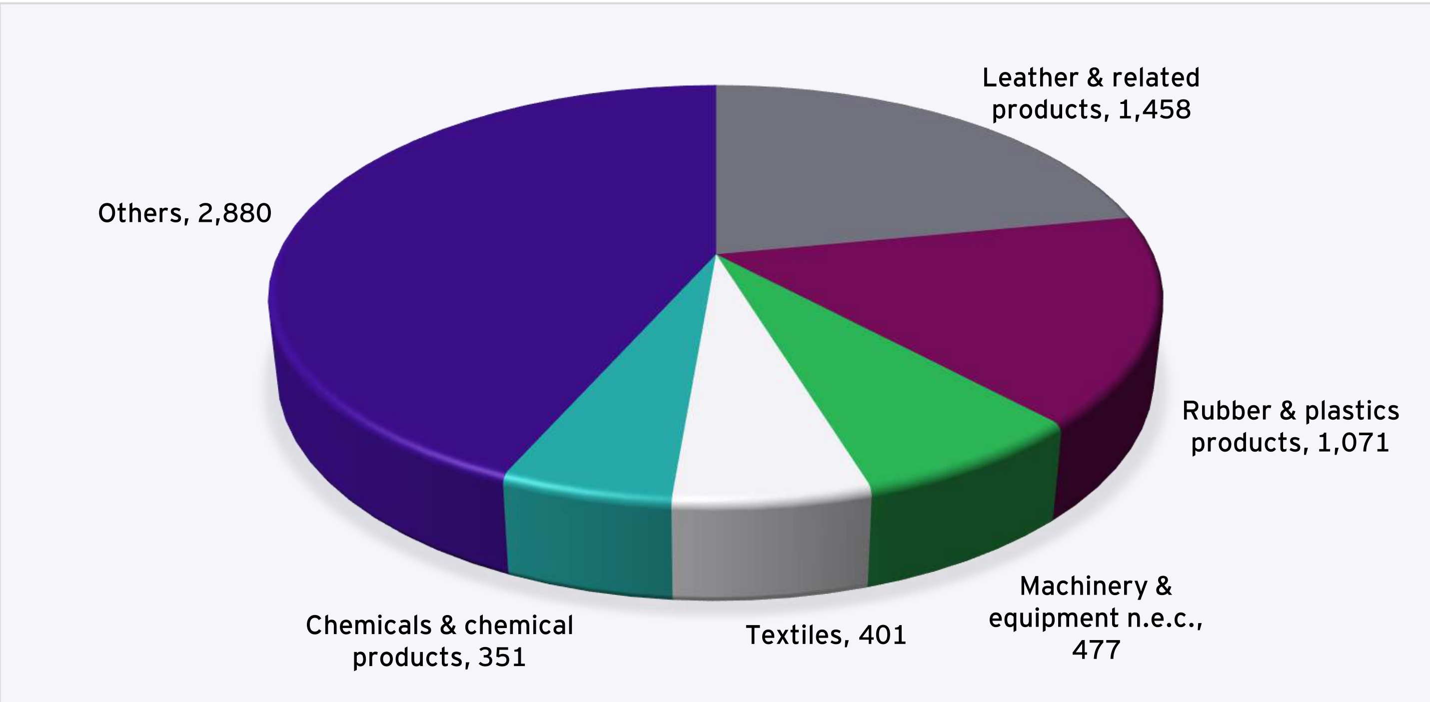


Figure 126: **[Jhajjar]** Top 5 Sectors with maximum new employment in last 3 Financial Years (FY'17-FY'19)

Key Takeaways

- Leather & related products MSME sector provides the maximum employment (13,228) followed by rubber & plastic products sector (3,649) and machinery & equipment sector (2,904).

- Further, leather & related products MSME sector has created the maximum new employment in last 3 years (1,458), followed by rubber & plastics products (1,071) and machinery & equipment (477).

- Leather & related products have maximum employment intensity with an average of 58.0 employees per unit, followed by textile with 33.5 employees per unit and other transport equipment at 26.8 employees per unit.

- Beverages sector and wearing apparels sector have the least employment intensity with only 6.0 employees per unit.

- Sectors such as tobacco products and pharmaceuticals, medicinal chemical & botanical products, have experienced relatively low growth in new employment.

5. EXPORTS FROM THE DISTRICT

Some of the key products exported from Jhajjar include pharmaceuticals, leather footwear, glass wares, electronic microwave components used in aircraft, missiles & radars, ultra marine blue, ceramic glazed tiles, sanitary wares, lead pencils, brake linings, etc.

Exports worth **INR 1,10,012.90 Lakhs** and **INR 122684.40 Lakhs** were reported from district Jhajjar for the year 2017-2018 and 2018-2019.

(The export figures above represent only exports related information that is available at the District Industries Centre, Jhajjar, and actual exports figure might be significantly higher).

6. NATURAL RESOURCES & RAW MATERIAL AVAILABLE

District Jhajjar is marked by the presence of broadly four kinds of soil, i.e. clay, loamy clay, and loamy sandy. The area is alluvial in nature and fertile. But the soil is Nitrogen deficient.

The district can be divided into three physiographical regions, i.e. north-eastern upland plain, Jhajjar lowland and sandy tract.

The area is formed of recent alluvium rocks, and consists of deposits of clay, silt, sand and loose gravels.

The Sahibi stream, originating from Mewat hills, enters the Jhajjar district from south through district Rewari.

Some of the commonly found trees include Shisham, Siris, Mulberry, Mango, Peepal, Gular, Barh, Lasura and Simbal. Aam and Jamun are the most important among the fruit trees.

There is also presence of smaller trees/Kair/Beri/Jharpala that grows abundantly in unweeded fields. It also forms a valuable source of fodder.

Major Kharif crops of the Jhajjar district include paddy, jowar, bajra and sugarcane, while minor kharif crops are cotton and pulses.

Major rabi crops of the Jhajjar district are wheat, rapeseed and mustard seed, while the minor ones are barley, gram and winter vegetables.

7. KEY INDUSTRIAL ESTATES

There are three major industrial areas in district Jhajjar.

Table 121: Key Industrial Estates in Jhajjar

S. No.	Name of Industrial Area	Number of Plots/Sheds
1	HSIIDC Industrial Area	658
2	MIE Estate (I & II)	2322
3	Government Industrial Area, Bahadurgarh	85

8. MAJOR LARGE-SCALE UNITS

Apart from MSMEs, Jhajjar also has around 24 Large & Mega enterprises operational in various sectors. Below table showcases number of Large & Mega enterprises in each sector along with their names.

Table 122: **[Jhajjar]** Large & Mega Units in each Sector

S. No.	Industry	Large & Mega	Names of Large & Mega Units
1	Electrical equipment	3	• Panasonic India Pvt. Ltd. • Amber Enterprises Ltd Dadri Toe • Neolite Industries
2	Fabricated metal products, except	1	• Surya Roshni Ltd. • Allied Strips Ltd.

	machinery and equipment		• J.V. Strips Ltd., Bahadurgarh. • Zeco Aircon Industries Pvt.
3	Food products	1	• Parle Biscuits Ltd.
4	Furniture	1	• Merino Panel Products Ltd
5	Leather and related products	1	• Relaxo Footwear Ltd.
6	Motor vehicles, trailers and semi-trailers	2	• Rinder India Pvt. Ltd Masu Brakers Pvt. Ltd.
7	Pharmaceuticals, medicinal chemical and botanical products	1	• Mediplus India Ltd.
8	Rubber and plastics products	1	• Swastik Pipes Pvt. Ltd.
9	Other manufacturing	13	• J.K. Lakshmi Cement • Ultra Tech Cement Ltd. • J.K. Super Cement • Somany Ceramics Ltd. • Hindustan Petroleum Corpn. Ltd. • Hindustan National Glass & Inds Ltd. • Glass Equipment (India) Ltd. • Hindustan Coals Ltd • N.T.P.C. Power Plant Jharli • Clp Power Plant, Jharli • Hindustan Sanitary Ware & Inds. Ltd. • JSL Lifestyle • Schablona India Ltd

9. SERVICES SECTOR SNAPSHOT

Below table gives snapshot of the services sector in Jhajjar:

Table 123: **[Jhajjar]** Services Sector Snapshot

S. No.	Industry	Total Units	Micro	Small	Medium	Total Investment (INR Lakhs)	Total employment
1	Civil Engineering	12	6	0	6	555	205
2	Construction of building	16	14	0	2	349	191
3	Electricity, gas, steam and air conditioning supply	10	4	0	6	284	114
4	Office administrative, office support and	28	25	0	3	228	219

	other business support activities						
5	Other professional, scientific and technical activities	117	110	0	7	811	566
6	Specialized construction activities	13	10	0	3	205	95
7	Architecture and engineering activities; technical testing and analysis	18	10	1	7	733	241
8	Financial service activities, except insurance and pension funding	12	11	0	1	69	45
9	Food and beverage service activities	42	35	0	7	423	193
10	Mining support service activities	-	-	-	-	-	-
11	Repair of computers and personal and household goods	19	13	0	6	333	175
12	Warehousing and support activities for transportation	19	9	2	8	969	203
13	Water collection, treatment and supply	12	9	0	3	207	87
14	Computer programming, consultancy and related activities	35	33	0	2	133	160
15	Human health activities	19	12	2	5	1636	303
16	Information service activities	44	24	0	20	397	184
17	Real estate activities	12	5	0	7	483	156

10. CLUSTERS SCENARIO

There is one Micro & Small Enterprises - Cluster Development Programme (MSE-CDP), Government of India cluster under implementation in the district.

Table 124: MSE-CDP Clusters in Jhajjar

S. No.	Cluster	Location	Cluster Identification	DSR Preparation	DPR Preparation	Implementation
1	Footwear Cluster	Bahadurgarh	√	√	√	√

There is a potential for more cluster such as plastic molding, paints and chemicals, auto components, engineering products, etc. given the significant presence of industries within these sectors.

11. INDUSTRY ASSOCIATIONS

There are four key industrial associations in district Jhajjar.

Table 125: Industry Associations in Jhajjar

S. No.	Name of Association	Name of President	Address	Contact
1	Bahadurgarh Chamber of Commerce & Industries	Sh. Vipin Bajaj, President	Plot No. 6, MIE, Bahadurgarh	9811155599
2	Bahadurgarh Industries Association	Sh. Pardeep Goyal, President	O-31, Old Industrial Area, Bahadurgarh	09315877241
3	Footwear Park Association	Sh. Raj Kumar Gupta, President	Plot No.284, Sec-17, HSIIDC, Bahadurgarh	09310501098
4	Ganpati Dham Industrial Association, Industrial Area	Sh. Parveen Garg, President	Industrial Area, Bahadurgarh	9811225655

12. KEY ISSUES OF THE INDUSTRIES

Some of the recent issues being faced by Industries in Jhajjar are:

- There are no proper transport facilities in the district due to the strong transport union in Bahadurgarh. Industrialist are under pressure to pay more for transportation in Jhajjar, compared to other districts.
- There is no yard/proper place for disposal of industrial wastage.

- The service of fire brigade is not proper as only two vehicles are in service. In case of fire, the vehicles are demanded from Delhi/other nearby districts. There are a lot of footwear units in Bahadurgarh, and so many cases of fire are reported every year resulting in heavy losses to the industrialists.

- The supply of electricity by the HBVN is not enough while G-sets are not allowed as per NGT notification.

- The supply line of PNG is not available in all sectors/area of Bahadurgarh. All other fuels are banned except PNG in the NCR.

- Exporters don't get GST refunds in the stipulated time frame hence adding to their financial burden.

- Roads and sewerage system are not proper in MIE, Part-A&B, Old Industrial Area.

13. POTENTIAL AREAS OF INTERVENTION

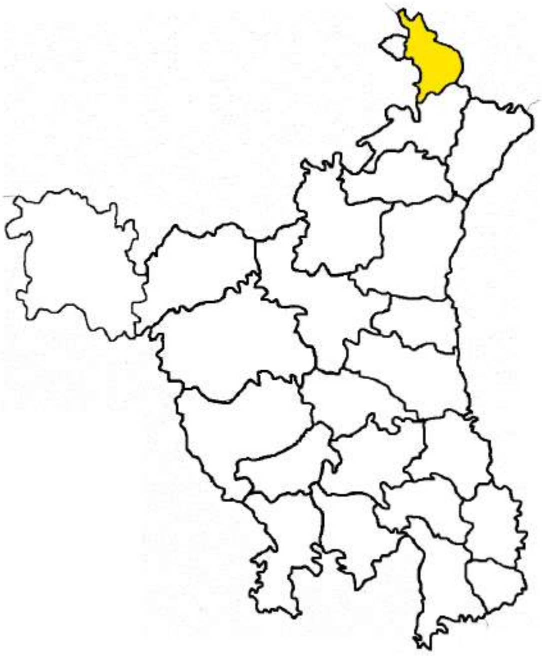
- State govt. needs to intervene to ensure more local private investment in transportation facilities in the district.
- Industrial areas need to be equipped with facilities such as Sewage treatment plant, Effluent treatment plant.
- Fire brigade department in the district needs to be upgraded as per the needed demands of the industry & civilian areas.
- PNG lines need to be expanded to the key industrial areas in Bahadurgarh.
- Inputs tax credit-based refund for exporters needs to be made strictly time based especially for MSMEs who generally operate on low working capital.

14. POTENTIAL AREAS OF INVESTMENT

- Jhajjar is primarily known for its leather & related products industry/ especially the prominent Footwear sector in Bahadurgarh. There is significant scope for investment towards leather processing value chain facilities in the district which can supply required raw materials to these units.
- Rubber & plastic products is another fast-growing sector in the district with 164 MSMEs currently, 49 of whom have started operations in last 3 years. Sector offers investment opportunity in product diversification and raw materials processing.

15. Panchkula

District Profile



EXECUTIVE SUMMARY

District Profile

MSME Scenario

15

Panchkula

Famous for….

"Auto-Components Industry"

1 MSMEs in Panchkula

Total number of MSME units **1230**

New MSME units (last 3 years) **521**

- Fabricated Metal Products
- Food Products
- Pharmaceuticals
- Wearing Apparel
- Machinery & Equipment

Top 5 sectors – Maximum number of MSMEs

2 Investment Scenario in Panchkula

Total Investment (INR Lakhs) **54,917**

New Investment (last 3 years; INR Lakhs) **15,462**

- Pharmaceuticals
- Fabricated Metal Products
- Computer, Electronic & Optical Products
- Food Products
- Motor vehicles, trailers & semi-trailers

Top 5 sectors – Maximum investment by MSMEs

3 Employment Scenario in Panchkula

Total Employment **13,302**

New Employment (last 3 years) **3,557**

- Pharmaceuticals
- Fabricated Metal Products
- Food Products
- Electrical Equipment
- Machinery & Equipment

Top 5 sectors – Most employment generated

4 Potential for MSMEs

Significant investment opportunity towards marketing of Auto-components products of the district such as common display center, cross border commerce, digital marketing etc

Attractive opportunity in investment towards facilities that can supply raw materials to the Chemicals & Chemical Products Industry in Panchkula

5 Others

Total Exports (FY 18-19; INR Lakhs) **39,042**

Number of Large & Mega units **81**

Existing Clusters **DSR prepared for 1 Mini Cluster**

1. INTRODUCTION

Panchkula was formed as the 17th district of Haryana State on 15th August 1995 by carving out the development blocks of Pinjore, Raipur Rani, and Morni & Barwala from Ambala District. It forms a part of the tri-city area i.e. Panchkula, Chandigarh and Mohali. Panchkula is located on the Ambala - Shimla highway no. 22. Panchkula is well connected to neighboring states of Punjab & Himachal Pradesh via NH-5.

1.1 Geography

Panchkula lies in the north of the Haryana state, and is surrounded by Ambala on the south, Patiala & Chandigarh on the west, and Solan & Sirmour districts of Himachal Pradesh in North & East. Panchkula has a largely plane landscape apart from Morni Hills situated in the District.

Panchkula has sub-tropical climate with mostly monsoon rains and some rains in winters from western disturbances. Ghaggar, Sirsa & Kaushalya are the key river streams in the district with Ghaggar being the only perennial river. District has good underground water especially in the southern parts. Soil on the district is mostly light loam, which is considered suitable for agricultural use.

1.2 Demographic Profile

As per the census of 2011, total population of Panchkula is 558890 persons and is ranked 537th among 640 districts on population. District has a population density of 645 persons per Sq. Km. Rural to urban percentage distribution is 54.86% & 45.14% respectively. Panchkula has a high literacy rate of 83.4%. As Panchkula borders Punjab & Chandigarh, majority of the population in the district speaks Punjabi as their first language. The district has a lower female to male ratio at 870 females per thousand males, compared to the state average of 877 and significantly lower than the national average of 940. Population growth for Panchkula for the decade 2001-2011 is 19.32%.

1.3 Administrative Set-up

Panchkula has a total land area of 898 Sq. Km. Panchkula & Kalka are the two sub-divisions of the district as well as tehsils. There are three sub-tehsils in Panchkula: Morni, Raipur Rani & Barwal, 29 Patwar Circles, 1 Nagar Nigam, 4 towns, 4 blocks, 121 Gram Panchayats and 253 revenue villages.

The following table shows categorization of blocks as per the status of industrial development.

Table 126: **[Panchkula]** Categorization of Blocks

Block A	Block B	Block C	Block D
	Barwala		Raipur Rani
	Pinjore		Morni

2. SECTOR WISE MSME LANDSCAPE

Following table shows the total number of MSME units in each sector, in Panchkula, along with the bifurcation of number of micro, small and medium enterprises.

The table also shows number of new units that started their commercial production in the last three financial years.

Table 127: **[Panchkula]** No. of MSME Units in each Sector

S. No.	Industry	Total Units	Micro	Small	Medium	New Units (Last 3 Years)
Food, Beverages & Tobacco						
1	Food products	160	127	32	1	87
2	Beverages	10	7	3	0	5
3	Tobacco products	1	0	1	0	1
Textiles & Apparel						
4	Textiles	46	37	9	0	20
5	Wearing apparel	95	92	3	0	71
Leather, Wood & paper						
6	Leather and related products	10	10	0	0	3
7	Wood and products of wood and cork, except furniture; articles of straw and plaiting materials	19	16	3	0	10
8	Paper and paper products	44	28	16	0	19
9	Furniture	41	31	10	0	12
Pharma, Petro-Chemicals, Rubber products						
10	Pharmaceuticals, medicinal chemical and botanical products	81	54	24	3	41
11	Chemicals and chemical products	53	38	15	0	29
12	Rubber and plastics products	36	25	11	0	12
Metals & Mineral Products						
13	Basic metals	31	20	11	0	11
14	Fabricated metal products, except machinery and equipment	104	65	37	2	24
15	Non-metallic mineral products	49	34	15	0	26
Electrical, Electronics & Machinery						

16	Computer, electronic and optical products	29	16	10	3	11
17	Electrical equipment	53	37	15	1	14
18	Machinery and equipment n.e.c.	63	39	24	0	14
Automotive & Auto-Components						
19	Motor vehicles, trailers and semi-trailers	43	15	27	1	6
20	Other Transport Equipment	11	4	7	0	3
Other Manufacturing						
21	Other manufacturing	243	179	63	1	95
22	Repair & Installation of machinery & equipment	19	17	2	0	10
23	Printing & reproduction of recording media	17	8	9	0	6

Following scatter diagram shows the comparison between total units in each sector vis-a-vis new units opened in the last 3 financial years.

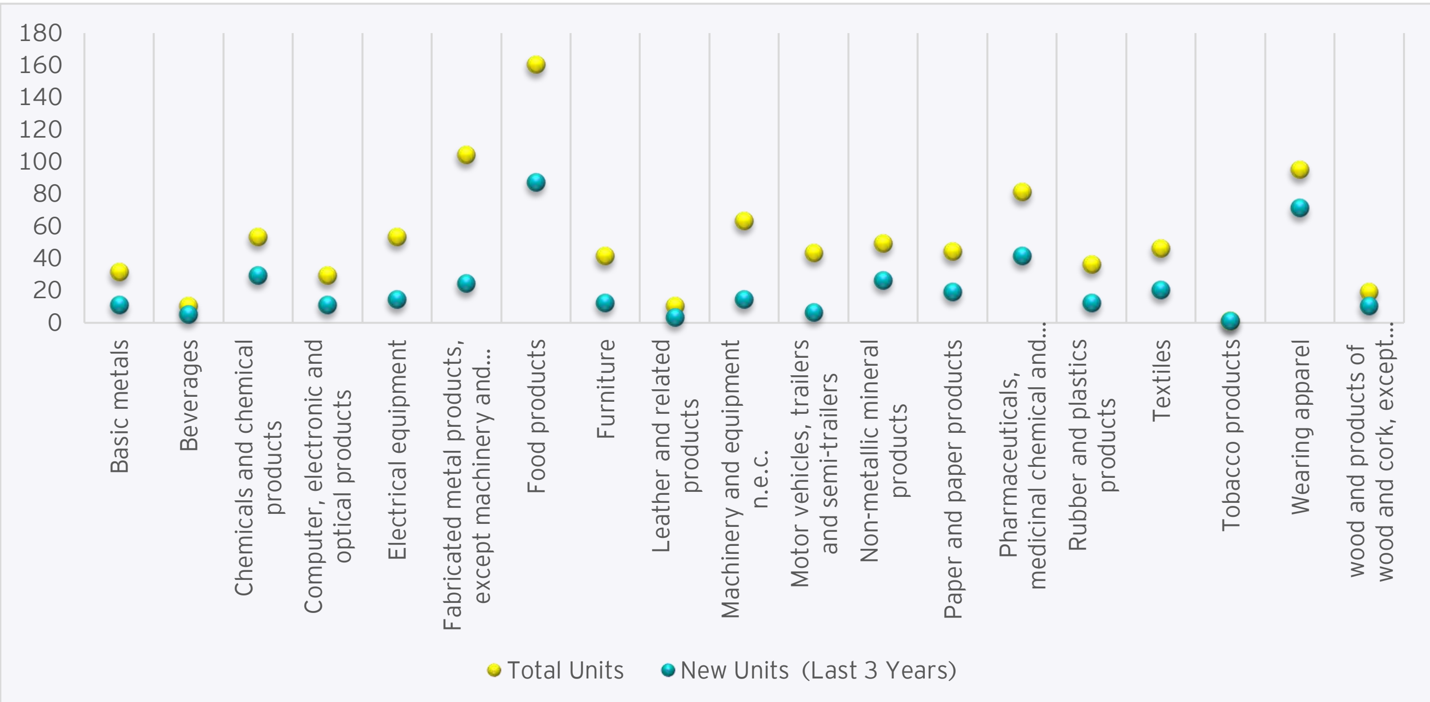


Figure 127: **[Panchkula]** Total Units & New Units in each Sector

2.1 Top 10 Sectors: Based on Number of Units

Following table shows top ten sectors in Panchkula, based upon the total number of MSME units in the district.

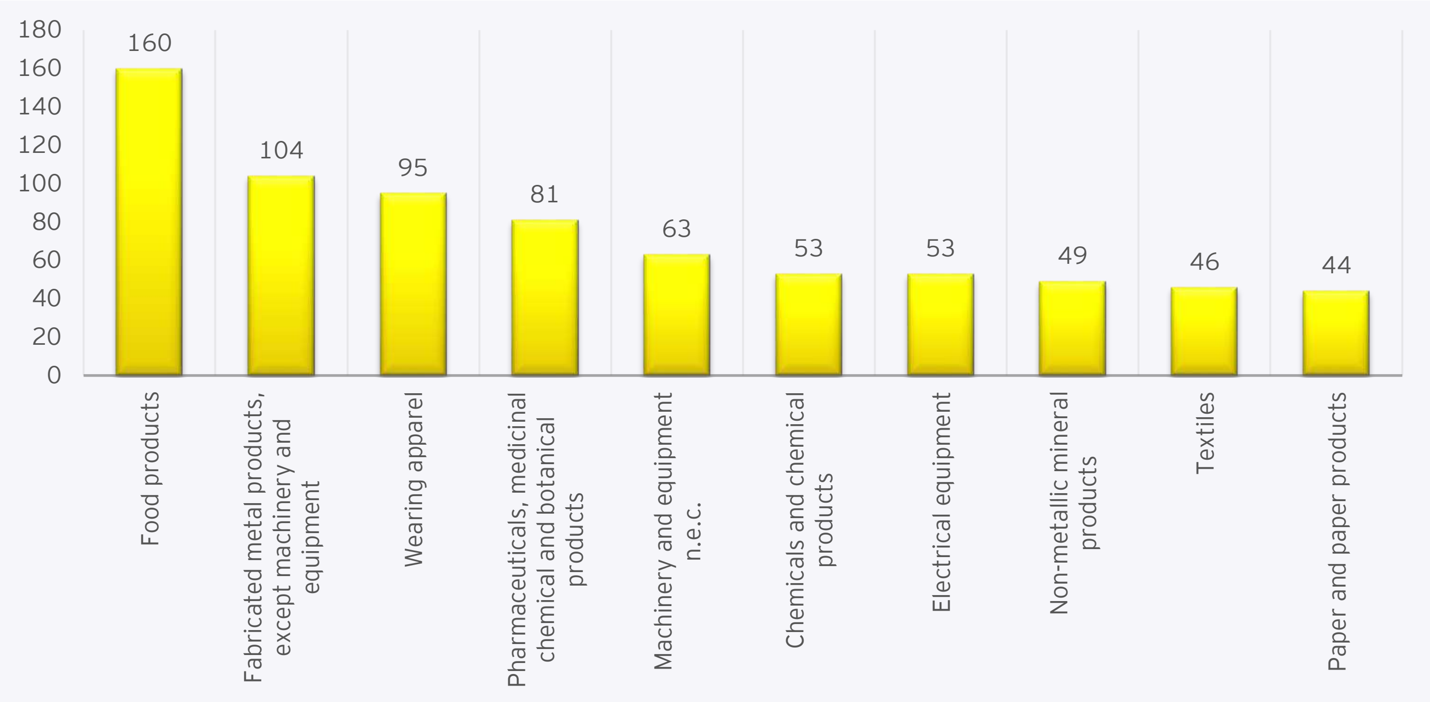


Figure 128: **[Panchkula]** Top 10 sectors - Total No. of MSME Units

2.2 Top 10 Sectors: Based on New Units in Last 3 Years

Following table shows the top ten sectors in Panchkula, based upon number of new MSME units set-up in the last three years.

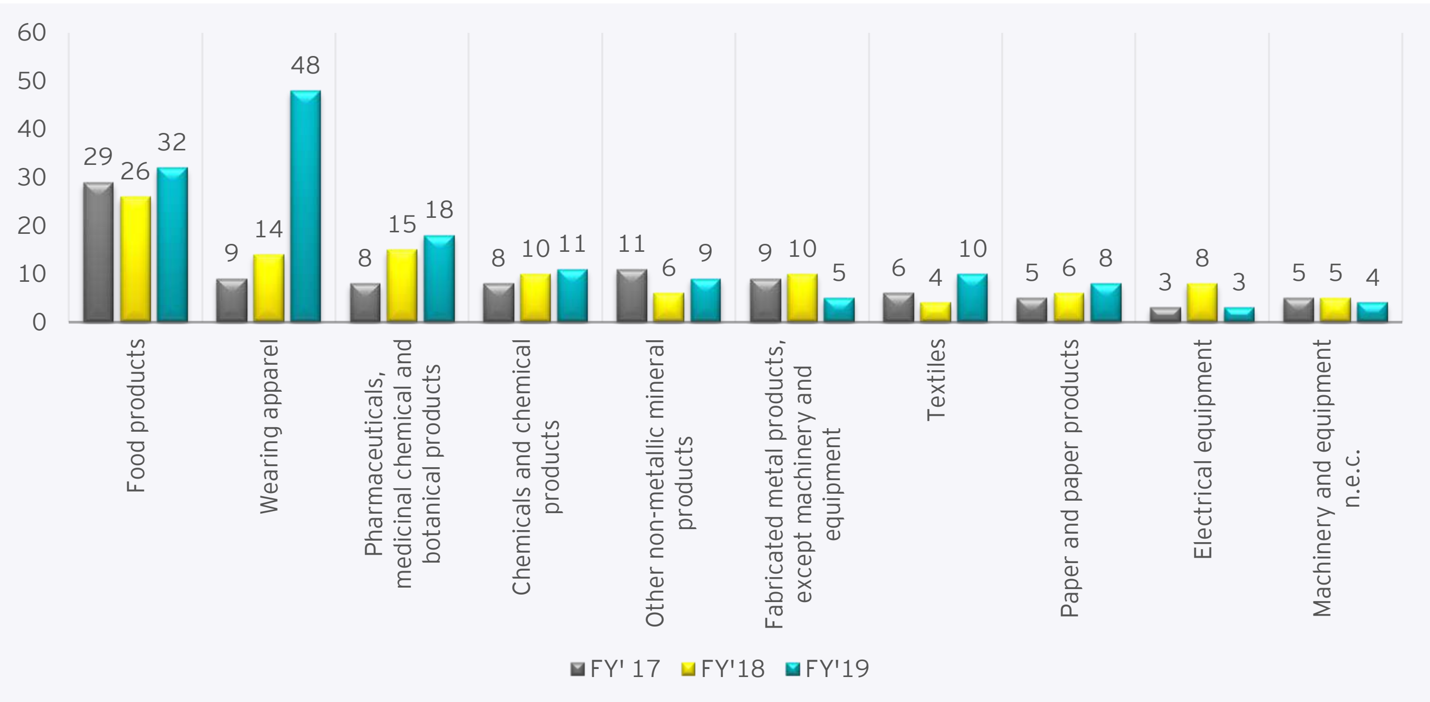


Figure 129: **[Panchkula]** Top 10 Sectors - New Units in Last 3 Years

Key Takeaways

- Maximum no. of MSME units in Panchkula are involved in the 'food products' sector, followed by fabricated metal products.
- Apart from food products & fabricated metal products; wearing apparel, pharmaceuticals, machinery & equipment have significant number of MSMEs operating out of Panchkula.
- In last three years also, 'food products' sector has seen maximum number of new MSME units opened (87), followed by wearing apparel (71) & pharma (41).
- In terms of percentage growth, wearing apparel has experienced impressive recent growth with 74.7% of the total units having opened up in the last 3 years, followed by chemicals & food products.

3. SECTOR WISE INVESTMENT SCENARIO

Punjab National Bank is the convener bank of State Level Bankers' Committee (SLBC) in Haryana and also the district lead bank of Panchkula.

Following table shows the total investment by MSMEs in each sector in Panchkula, along with new investment in the last three financial years (figures are in Lakhs).

Table 128: **[Panchkula]** Total Investment by MSMEs

S. No.	Industry	Investment (INR Lakhs)				
		Total Investment	FY'17	FY'18	FY'19	New Investment (Last 3Years)
Food, Beverages & Tobacco						
1	Food products	4820	1437	1071	788	3296
2	Beverages	250	25	91	15	131
3	Tobacco products	50	50	0	0	50
Textiles & Apparel						
4	Textiles	1805	57	20	86	163
5	Wearing apparel	399	57	80	65	202
Leather, Wood & paper						
6	Leather and related products	44	1	2	10	13
7	Wood and products of wood and cork, except furniture;	367	12	191	164	367

	articles of straw and plaiting materials					
8	Paper and paper products	1334	47	181	315	543
9	Furniture	1028	90	54	39	183
Pharma, Petro-Chemicals, Rubber products						
10	Pharmaceuticals, medicinal chemical and botanical products	6229	1776	465	539	2780
11	Chemicals and chemical products	2436	908	396	367	1671
12	Rubber and plastics products	1028	57	101	29	187
Metals & Mineral Products						
13	Basic metals	1744	85	16	166	267
14	Fabricated metal products, except machinery and equipment	6686	157	127	358	642
15	Non-metallic mineral products	2440	917	198	135	1250
Electrical, Electronics & Machinery						
16	Computer, electronic and optical products	4346	55	71	68	194
17	Electrical equipment	2490	31	888	22	941
18	Machinery and equipment	3349	161	165	348	674
Automotive & Auto-Components						
19	Motor vehicles, trailers and semi-trailers	3802	45	50	95	190
20	Other Transport Equipment	810	0	10	68	78
Other Manufacturing						
21	Other manufacturing	10270	956	485	277	1718
22	Repair & Installation of machinery & equipment	438	5	69	12	86
23	Printing & reproduction of recording media	1344	5	30	160	195

Following scatter diagram shows a comparison of total MSME investment and new investment in the last 3 financial years, across different sectors of Panchkula.

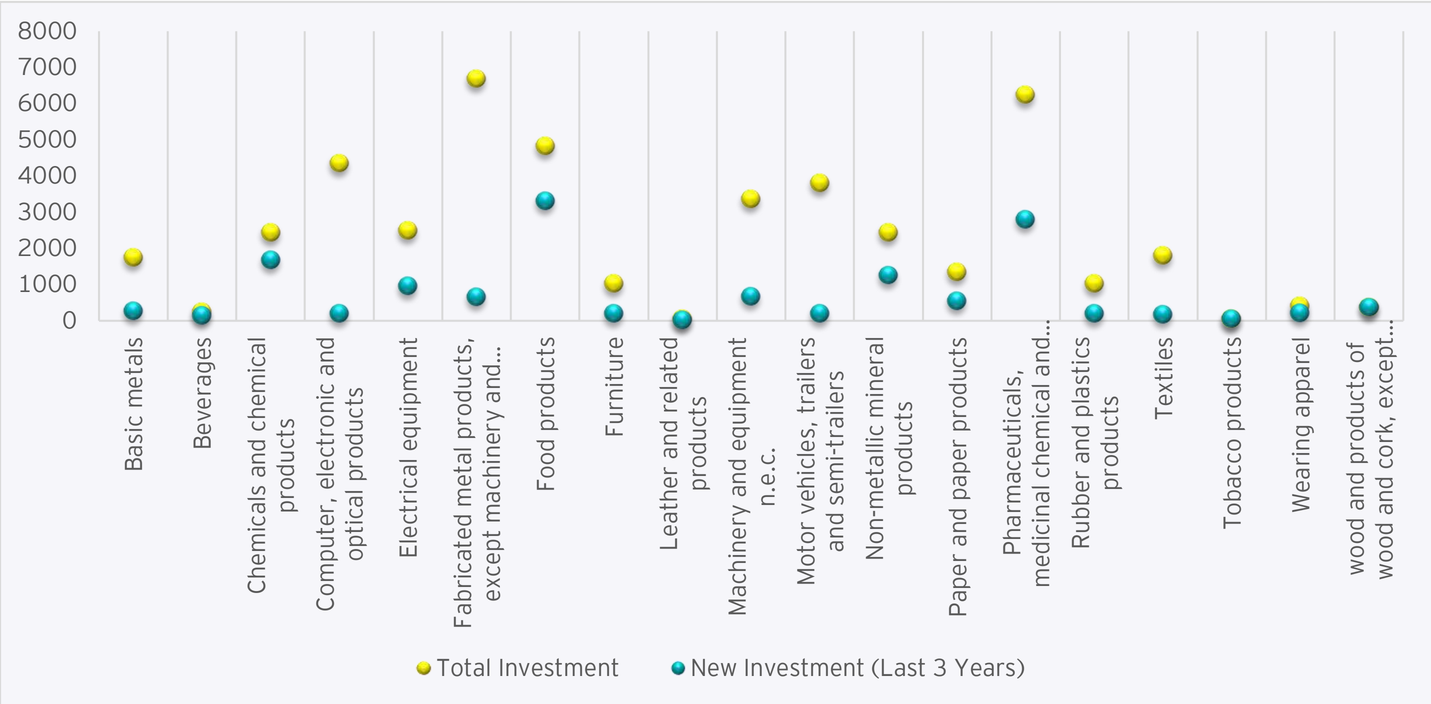


Figure 130: **[Panchkula]** Total Investment & New Investment in Last 3 Financial Years (FY'17-FY'19)

Following pie-chart showcases the sectors that have attracted maximum investments in the last 3 financial years (figures are in Lakhs).

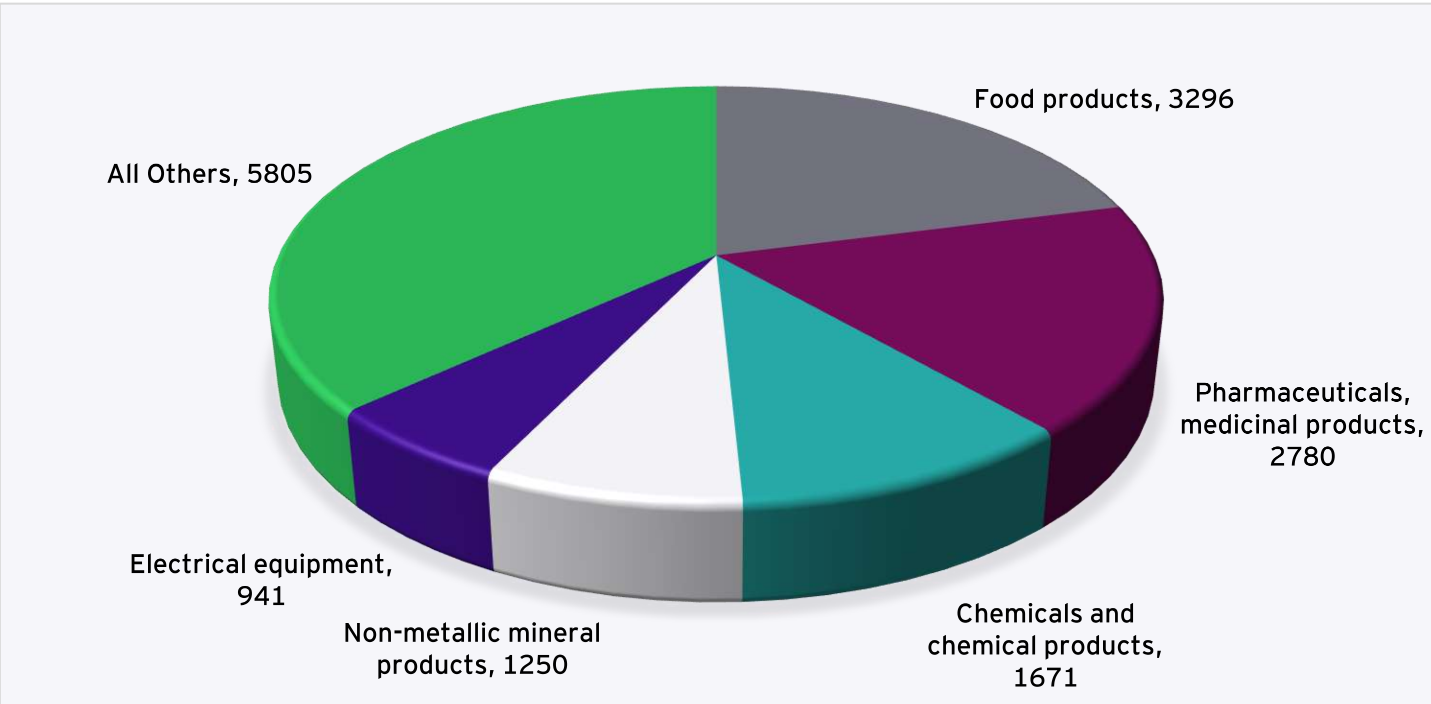


Figure 131: **[Panchkula]** Top 5 Sectors with maximum investment in last 3 Financial Years (FY'17-FY'19)

Following diagram shows a comparison of compound annual growth rate of various sectors for last three financial years.

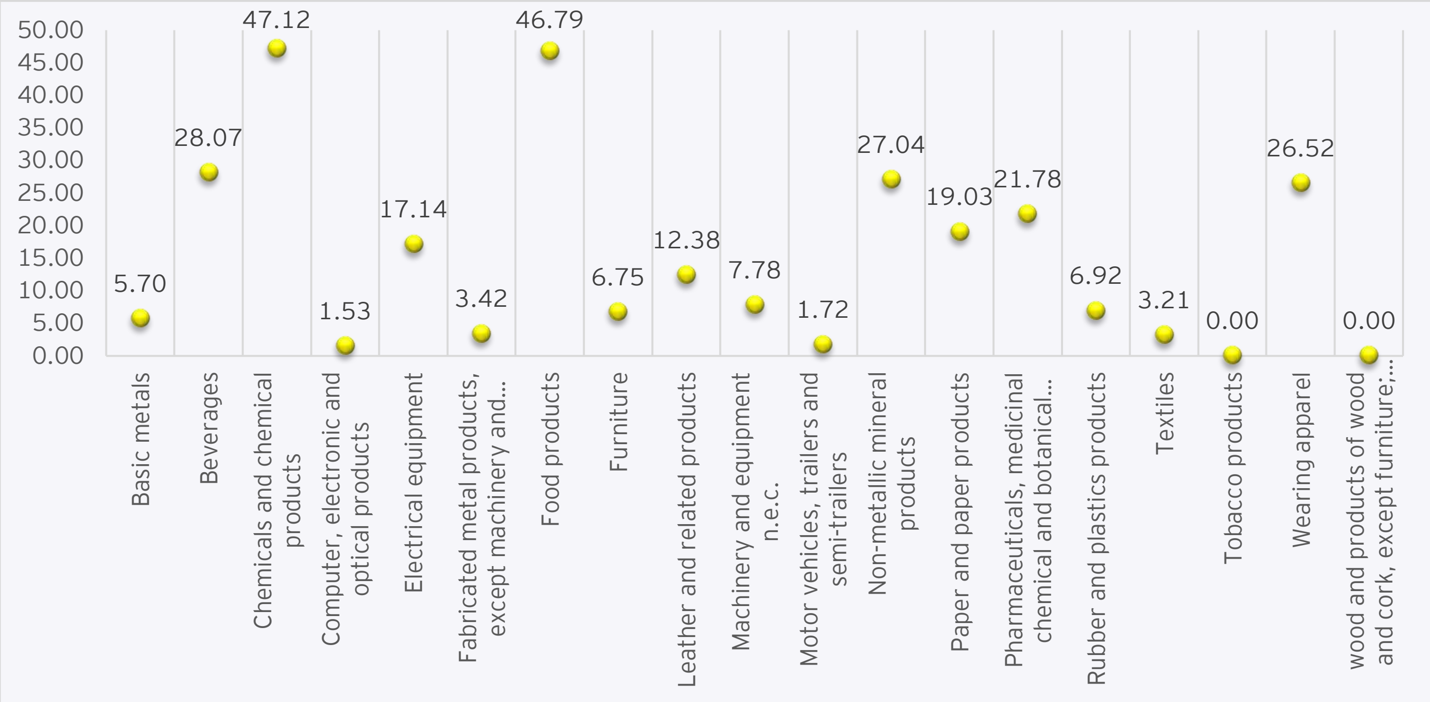


Figure 132: **[Panchkula]** CAGR for Last 3 Financial Years (FY'17-FY'19)

Key Takeaways

- Highest amount of investment by MSMEs in Panchkula has been in fabricated metal products sector (INR 66.86 Cr), followed by pharma sector (INR 62.29 Cr).
- Although fabricated metal has the highest total investment, last three financial years have seen maximum investment in the food products sector (INR 32.96 Cr) and pharma sector (INR 27.8 Cr).
- As evident apart from food & pharma, chemicals, non-metallic mineral products & electrical equipment have attracted the maximum investments in last three financial years.
- Sectors with high CAGR in MSME investments in last 3 FYS are: chemicals (47.12%), food products (46.79%), beverages (28.07%), non-metallic mineral products (27.04%) & wearing apparel (26.52%).

4. SECTOR WISE EMPLOYMENT SCENARIO

Below table showcases the total employment created by MSMEs in each of the sectors, along with new employment created in the last three financial years.

Table 129: **[Panchkula]** Total Employment in each Sector

S. No.	Industry	Total employment	FY'17	FY'18	FY'19	New Employment (Last 3 Years)
Food, Beverages & Tobacco						
1	Food products	938	150	204	161	515
2	Beverages	77	8	23	6	37
3	Tobacco products	8	8	0	0	8
Textiles & Apparel						
4	Textiles	355	21	14	46	81
5	Wearing apparel	254	49	36	72	157
Leather, Wood & paper						
6	Leather and related products	36	1	3	5	9
7	Wood and products of wood and cork, except furniture; articles of straw and plaiting materials	176	12	38	38	88
8	Paper and paper products	384	27	35	85	147
9	Furniture	456	15	26	27	68
Pharma, Petro-Chemicals, Rubber products						
10	Pharmaceuticals, medicinal chemical and botanical products	1327	219	148	180	547
11	Chemicals and chemical products	403	71	58	56	185
12	Rubber and plastics products	318	18	60	14	92
Metals & Mineral Products						
13	Basic metals	516	22	2	51	75
14	Fabricated metal products, except machinery and equipment	1349	53	70	114	237
15	Non-metallic	529	117	65	90	272

	mineral products					
Electrical, Electronics & Machinery						
16	Computer, electronic and optical products	555	10	31	26	67
17	Electrical equipment	998	17	266	20	303
18	Machinery and equipment	854	28	35	39	102
Automotive & Auto-Components						
19	Motor vehicles, trailers and semi-trailers	632	26	8	15	49
20	Other Transport Equipment	143	0	2	0	2
Other Manufacturing						
21	Other manufacturing	3137	182	154	182	518
22	Repair & Installation of machinery & equipment	73	2	26	4	32
23	Printing & reproduction of recording media	154	3	9	45	57

Following scatter diagram shows a comparison of total employment across different MSME sectors and new employment generated in the last 3 financial years.

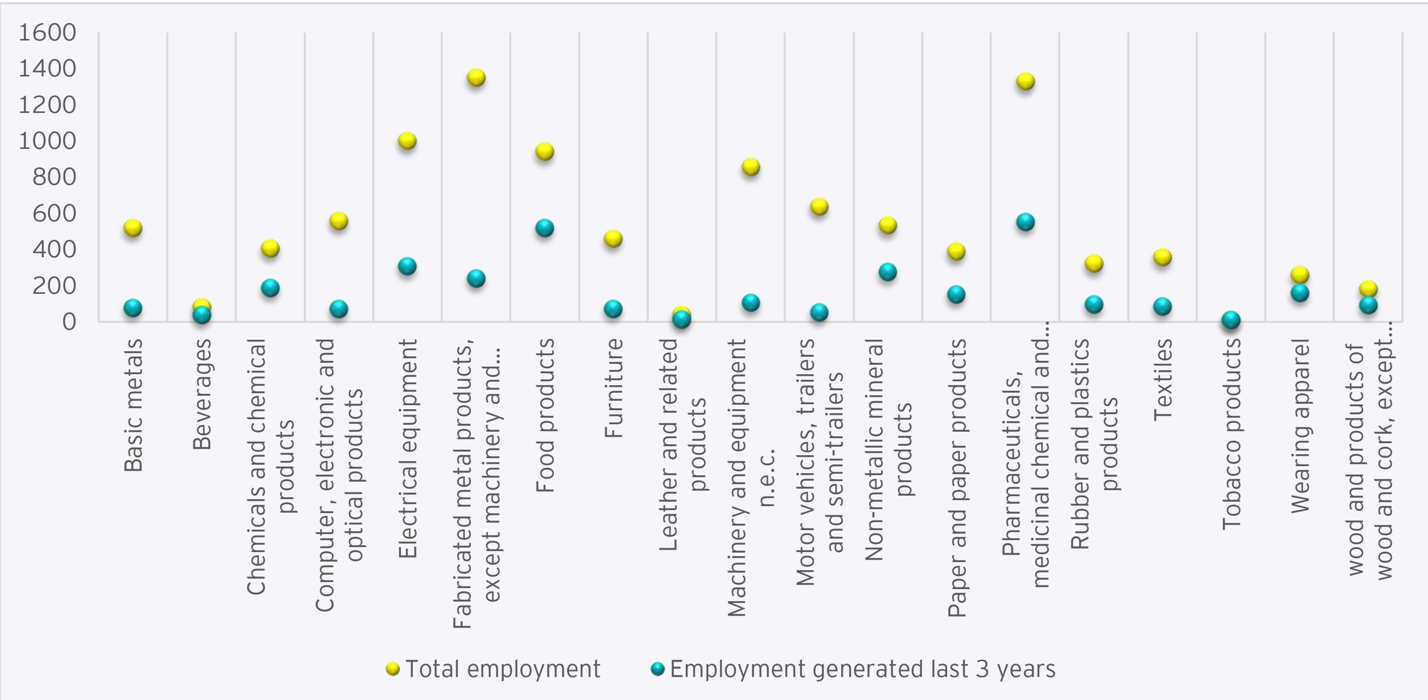


Figure 133: **[Panchkula]** Total Employment & New employment in last 3 Financial Years (FY'17-FY'19)

Following bar chart showcases category wise per unit employment analysis for MSMEs in Panchkula.

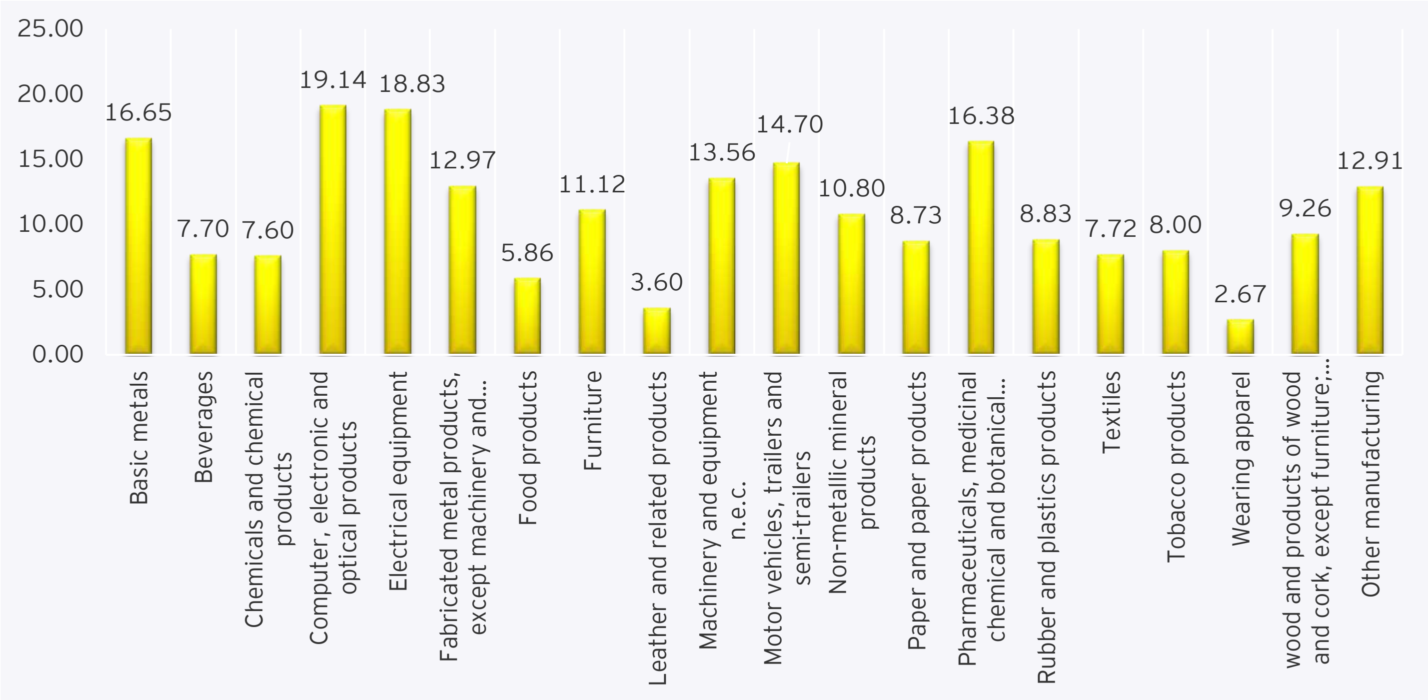


Figure 134: **[Panchkula]** Category wise employment intensity

Following pie-charts showcase the sectors that have created maximum employment in each of the last 3 financial years.

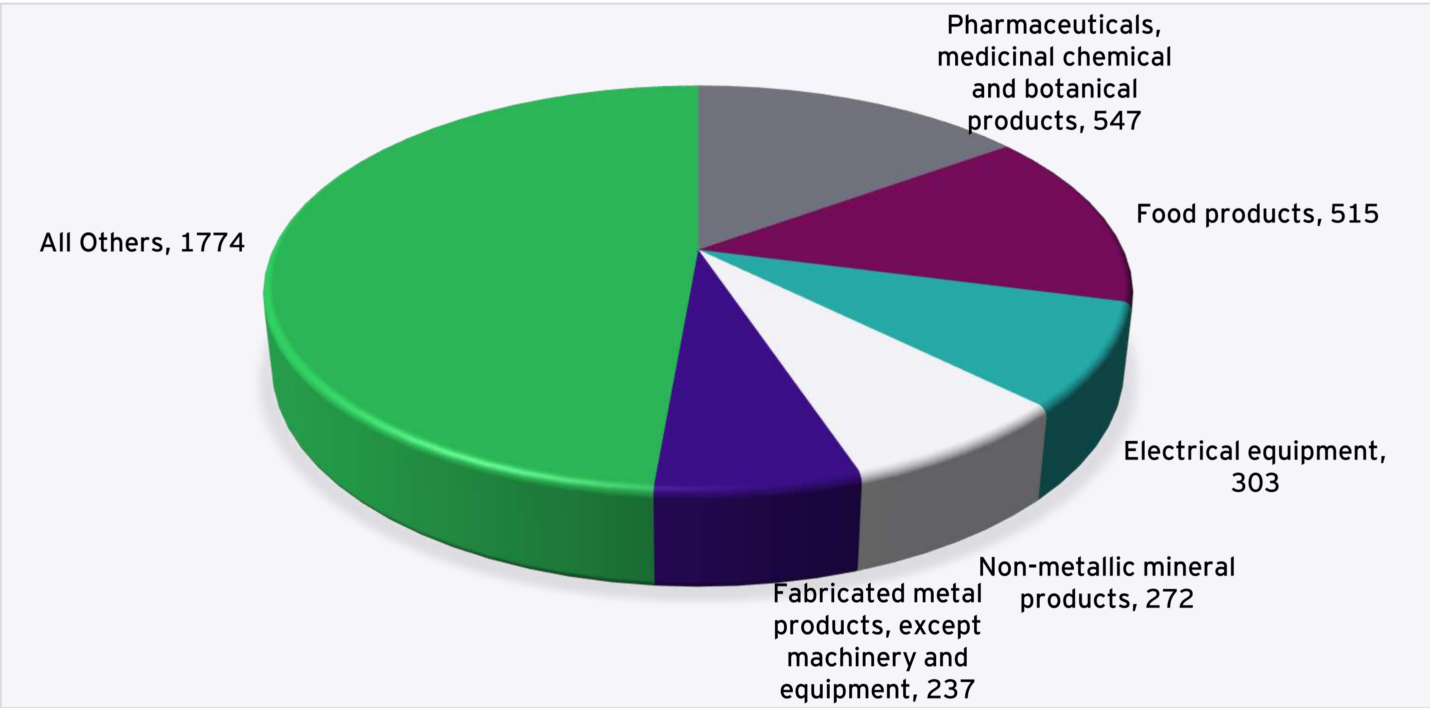


Figure 135: **[Panchkula]** Top 5 Sectors with maximum new employment in last 3 Financial Years (FY'17-FY'19)

Key Takeaways

- Fabricated metal products MSME sector provides the maximum employment (1349) followed by pharma sector (1327) & electrical equipment sector (998).
- Pharma sector has created the maximum new employment in last 3 years (547), followed by food products (515) & electrical equipment (303). Sectors such as fabricated metal products, machinery & equipment, motor vehicles, have experienced relatively low growth in new employment.
- Manufacturers of computer, electronic & optical products have maximum employment intensity with an average of 19.14 employees per unit, followed by manufacturers of electrical equipment with 18.83 employees per unit and manufacturers of basic metals at 16.65 employees per unit.
- Wearing apparel has the least employment intensity with only 2.67 employees per unit, followed by leather and related products at 3.60 employees per unit.
- Pharmaceutical sector has created the maximum employment in Panchkula in last three years, followed closely by the food products sector. Other sectors in top 5 in terms of employment creation are electrical equipment, non-metallic mineral products & fabricated metal products.

5. EXPORTS FROM THE DISTRICT

Key exports products from Panchkula include electrical equipment, leather & related products & food products. Following table shows some of the exports from Panchkula for last 2 FYs.

(The export data in the table shows only exports related information that is available at the District Industries Centre, Panchkula, and actual exports figure might be significantly higher).

Table 130: Exports from Panchkula

S. No.	Industry	Exports (INR Lakhs)	
		FY'18	FY'19
1	Civil Engineering	854.57	3022.07
2	Manufacture of chemicals and chemical products	2045.63	0.00
3	Manufacture of electrical equipment	7250.43	2853.18
4	Manufacture of food products	0.00	29689.71
5	Manufacture of leather and related products	7167.00	0.00
6	Manufacture of machinery and equipment n.e.c.	0.00	753.41
7	Manufacture of textiles	73.48	67.05
8	Other personal service activities	0.00	2656.15

6. NATURAL RESOURCES & RAW MATERIAL AVAILABLE

Raw materials available in Panchkula are primarily construction materials, Agricultural produce & botanical resources.

Panchkula has a total forest cover of around 384 sq. km and the main flora consists of Sheesham, Neem, Kikar & Eucalyptus.

Total agricultural produce by total area under cultivation consists of Cereals primarily Wheat, followed by Rice & Maize. Other crops grown in relatively smaller quantities are vegetables & fruits, oil seeds, pulses & sugar cane. Major fruits grown in the district include citrus fruits, guava, mango, plums, chiku & ber.

Building raw materials available in Panchkula include Stone, Sand, Bajri & Loamiest. Crushers in Panchkula supply construction material to builders in Haryana, Punjab, Tricity, and Delhi. Burj Kotian is the primary crushing zone with more than 50 crushers operational.

7. KEY INDUSTRIAL ESTATES

Panchkula currently has five Industrial estates. These are:

- Industrial Area Phase -1, Panchkula
- Industrial Area Phase -2, Panchkula
- Panchkula IT Park
- HSIIDC, Alipur, Barwala
- HSIIDC, Kalka, Pinjore

Industrial area Phase-1 & Phase-2 Panchkula have 950 plots in total and all of them have been allotted. Panchkula IT Park has 27 plots in total, out of which 18 plots have been allotted and 9 are un-allotted.

The details of HSIIDC Barwala are as under:

Total number of Plots	856
Allotted Plots	335
Un-allotted Plots	521
Units in Production	199
Percentage of plots allotted	39.13%

The details of HSIIDC Kalka are as under:

Total number of Plots	62
Allotted Plots	62
Un-allotted Plots	-
Units in Production	39
Percentage of plots allotted	100%

8. MAJOR LARGE-SCALE UNITS

Apart from MSMEs, Panchkula also has about 81 Large & Mega enterprises operational in various sectors. Below table showcases number of Large & Mega enterprises in each sector along with their names.

Table 131: **[Panchkula]** Large & Mega Units in each Sector

	Industry	Number	Names of Large & Mega Units
1	Manufacture of Basic Metals	13	• Star - Wire India Ltd, • Sadhu forging Pvt. Ltd, • Hyderabad Industries, • Jotindra Steel & Tubes, • Plasser (India) Pvt. Ltd, • Pooja Forge Pvt. Ltd, • GKN Driveline Transmission Ltd., • Sadhu Udyog,Starwire India Ltd. Unit (II), • Woodward Governor India (P) Ltd., • Sanden Vikas (India) Ltd.,Super Auto India Ltd, Mahavir Die Casting
2	Manufacture of Chemical and Chemical Products	1	• HPL Aditives Ltd.
3	Manufacture of Computer and electronics	1	• The Printer House
4	Manufacture of electrical equipment	10	• Orient Electric Ltd. • Whirlpool of India Ltd., (Refrigeration Division), • Havells India Ltd. • Orient Electric Ltd. • Globe Capacitors Ltd. • Super Electro Films • Marathon Electric India pvt. Ltd. • ABB India Ltd. • Metal Coatings India Ltd. • Tecumseh Products India (P) Ltd.
5	Manufacture of Food Products	1	• G.K. Dairy & Milks Products Pvt. Ltd
6	Manufacture of Leather Products	4	• Lakhani Footwear • Lakhani India Ltd. • Cosmic Consumer Goods Pvt. Ltd • Northern India Leather Cloth Mfg. Co. Pvt. Ltd

7	Manufacture of machinery and equipment	11	• Humbolt Wedag India Pvt. Ltd. • Vee Gee Engineers Pvt. Ltd • JBM Industries Ltd. • Victora Auto Pvt. Ltd • BCH Electric Ltd • Porritts & Spencer (Asia) Ltd • JCB India Ltd. • Super Screws Sterling Tools India Ltd. • Avery India Ltd.,
8	Manufacture of Motor Vehicles	10	• M/s JBM Auto Limited, • M/s Yamaha Motors India (P) Ltd. • M/s Victora Auto Pvt. Ltd, • M/s Indo – Autotech Ltd, • M/s Imperial auto industries Ltd • New Allenberry Works • Victora Tools Engineers Pvt. Ltd. • Escorts Ltd • Showa India Pvt. Ltd
9	Manufacture of Paper and Paper Products	6	• Voith paper Ltd • Kanin India Ltd. • Ajanta Offset & Packaging Ltd. • Nova Publications & Printers Pvt. Ltd. • Sai Security Printers Pvt. Ltd. • Thompson Press
10	Manufacture of Pharmaceuticals	7	• Jagsonpal Pharmaceuticals Ltd • Poly medicure Ltd • Hindustan Syringes & Medical Devices Ltd • Neeraj Industries limited • Lakhani Medicare Pvt. Ltd,
11	Manufacture of other transport equipment	1	• M/s Escorts Ltd. (Engg. Division)
12	Manufacture of Rubber and Palstic Products	1	• Good Year India Ltd
13	Manufacture of Textiles	2	• SPL Limited • SPL Industries Ltd
14	Manufacture of wearing Apparel	8	• Scorpios Apparels (P) Ltd. • Maurya Udyog Ltd. (Terry Towel Division) • STL global Ltd. • Shahi Exports Ltd. • Dhruv Global Ltd. • Pee Empro Export Pvt Ltd. • Gupta Exim (India) Pvt. Ltd. • Haryana Tex Prints (Overseas) Ltd.,

15	Other Manufacturing	5	• Khemka Containers (KCL) Ltd. • Studds Accessories Ltd. • Elofic Industries Ltd. • Sledgehammer oil Tools Pvt. Ltd.,

9. SERVICES SECTOR SNAPSHOT

Panchkula has a thriving services sector. Panchkula IT Park, established in 2008 and situated in Sector 22, Panchkula has several Information Technology & related services based large enterprises which includes offices of several multinational companies also.

Apart from this there are several MSMEs also involved in Services sector. Below table gives snapshot of the services sector in Panchkula:

Table 132 **[Panchkula]** Services Sector Snapshot

S. No.	Industry	Total Units	Micro	Small	Medium	Total Investment (INR Lakhs)	Total employment
1	Civil Engineering	26	16	10	0	1198	305
2	Construction of building	37	32	5	0	510	273
3	Electricity, gas, steam and air conditioning supply	13	11	1	1	1063	303
4	Office administrative, office support and other business support activities	2	2	0	0	21	8
5	Other professional, scientific and technical activities	7	7	0	0	48	28
6	Repair and installation of machinery and equipment	19	17	2	0	438	73
7	Specialized construction activities	26	20	6	0	652	241
8	Architecture	3	3	0	0	9	20

	and engineering activities; technical testing and analysis						
9	Financial service activities, except insurance and pension funding	1	1	0	0	3	3
10	Food and beverage service activities	12	11	1	0	117	64
11	Mining support service activities	2	1	1	0	95	20
12	Repair of computers and personal and household goods	1	1	0	0	2	5
13	Warehousing and support activities for transportation	1	1	0	0	5	4
14	Water collection, treatment and supply	5	5	0	0	49	62
15	Computer programming, consultancy and related activities	1	1	0	0	25	4
16	Human health activities	3	3	0	0	13	24
17	Information service activities	1	1	0	0	1	2
18	Real estate activities	5	5	0	0	18	14

10. CLUSTERS SCENARIO

Diagnostics study report has been prepared for the implementation of Auto-components cluster in Panchkula. The DSR recommends setting up of a Metal Cutting Centre, Machining Centre & a Modern Welding center for the auto-components manufacturers of Panchkula. Other key sectors with significant cluster formation potential are fabricated Metal Products, Chemicals & Chemical Products, and Machinery & Equipment etc.

11. INDUSTRY ASSOCIATIONS

There are seven key industrial associations in Panchkula.

Table 133: Industry Associations in Panchkula

S. No.	Association Name	Address	Email	Contact Person	Contact
1	The Haryana Chamber of Commerce & Industries Panchkula chapter	Plot No-195, Industrial Area Phase-1, Panchkula (Haryana)	state_president@hcci.in	Vishnu Goyal	01725028248, 9876000201
2	Industrial Welfare Association	Plot No. 365, Industrial Area, Phase-1, Panchkula	arungrover@amartex.com	Rajan Nanda (Secretary), Varun Grover(P)	9316682668, 9855695666, 9357799999
3	Industrial Association	Plot No-223, Industrial Area, Phase No-2, Panchkula	decor117@gmail.com	Mr. Ramesh Aggarwal (President), Rakesh Garg (GS)	9814087500
4	HMT Ancillary Association	203, Industrial Area, Phase-1, Panchkula.	aic_ind@hotmail.com	DS Jain	01722560569, 2560405, 9417133595
5	Barwala Industrial Association	Plot No-156-158, HSIIDC Industrial Estate, Barwala	vkm_katyal@yahoo.com	Sh. Vikram Katyal (President), Parveen Khosla (GS)	9814027928, 9878412522
6	Laghu Udyog Bharti	Plot No 164, Industrial Area, Phase 1, Panchkula	info@labtronicsindia.com	RK Sharma G.S., Dinesh Arora (President)	9814177389, 9872200189
7	Kalka Industrial Association	Plot No 5,6,7 HSIIDC, Kalka	kalkasteels@kalkasteels.com	(GS) Sudhir Gupta, Rohit Singh Dagger (President)	7056727287, 9814013606

12. KEY ISSUES OF THE INDUSTRIES

Some of the key issues raised by the various industry associations in Panchkula are:

- Utilities related Issues
  - Load shedding power cut in Industrial areas, even as Panchkula has been declared as a no power cut zone.
  - Request for prior notice of power cuts in unavoidable cases, to enable industries to plan their production accordingly.
  - Power Incentive in terms of lower charge per unit is highly desirable by the district industry to make the Panchkula MSME units more competitive.
  - Need for an efficient grievance redressal mechanism for genuine grievances of inflated/ overcharged bills.
  - Low water pressure in certain industrial areas and timings of the water supply not being in sync with the industry requirements.
- Infrastructure related Issues
  - Need for street lights in working conditions around Industrial Areas.
  - Sewer blockage in certain industrial areas such as Barwala.
  - Cleanliness conditions/ maintenance of parks in Industrial areas currently neglected.
  - Public transport for workers in industrial areas needs to be addressed.
  - Barwala Industrial Association has raised the need for a Solid Waste Management Plant, and development of a commercial area to serve the existing industry.
  - Kalka Industrial association has requested urgent focus upon repair/maintenance of the roads, especially near the entrance of the estate.
  - Need for Common Effluent Treatment Plant & Hazardous waste collection Centre in Industrial areas.
  - IT welfare association has requested better marketing of Panchkula IT Park, as is

being done by the IT park in Chandigarh. Also having high number of female employees, association has requested more stringent security measures such as CCTV cameras, security gates, functioning street lights etc.

13. POTENTIAL AREAS OF INTERVENTION

- Industries & Commerce department can coordinate with the UHBVN (Uttar Haryana Bijli Vitran Nigam) to form a consumer grievance redressal committee with representation from the Distribution Company, Industries Department & Industry Associations.

- Water supply timings need to be calibrated with requirements of the Industry.

- Industries Department may hold a quarterly meeting with Industry representatives of the district, for all Infrastructure related issues & consequent tracking of progress on the solutions decided upon.

- Possibility of cluster formation may be explored in sectors such as fabricated Metals, machinery & equipment, chemicals & chemical products.

14. POTENTIAL AREAS OF INVESTMENT

- 'Food Products' is a thriving sector in Panchkula, with 160 MSMEs currently, 87 of whom have opened in the last 3 years only. The sector also has a high CAGR of investment in last three financial years at 46.79%. There's a significant scope for further new investment in the sector in terms of backward & forward linkage business opportunities.

- 'Chemicals & Chemical Products' is another high growth sector in Panchkula (Investment CAGR: 47.12%), with 53 units currently operational, 54% of whom have started business in last 3 years only. There is attractive investment opportunity for investment in supplying raw materials to these units and also in manufacturing of downstream value chain products.

- 'Beverages' sector also represents considerable investment options, considering central location of Panchkula with respect to Haryana, Punjab & Himachal markets. The sector has experienced good investment CAGR of 28.07%, and 10 units are currently operational in Panchkula.

16. Bhiwani

District Profile

EXECUTIVE SUMMARY

District Profile

MSME Scenario

16

Bhiwani

Famous for....

"Surgical Instruments Industry"

1 MSMEs in Bhiwani

Total number of MSME units **950**

New MSME units (last 3 years) **671**

Food Products

Wearing Apparel

Textiles

Rubber & Plastic Products

Non-metallic products

Top 5 sectors – Maximum number of MSMEs

2 Investment Scenario in Bhiwani

Total Investment (INR Lakhs) **18,613**

New Investment (last 3 years; INR Lakhs) **12,755**

Food Products

Textiles

Rubber & Plastic Products

Non-metallic products

Electrical Equipment

Top 5 sectors – Maximum investment by MSMEs

3 Employment Scenario in Bhiwani

Total Employment **5,492**

New Employment (last 3 years) **3,913**

Food Products

Non-metallic products

Rubber & Plastic Products

Textiles

Wearing Apparel

Top 5 sectors – Most employment generated

4 Potential for MSMEs

Food products sector offers attractive investment opportunity in plants supplying secondary & tertiary level raw material supplies to these units

Proactive govt. support to train local manpower on skills required for Textiles/ Plastic/ non-metallic mineral products Industry etc., to attract further investments in these sectors provided adequate infrastructure is ensured

5 Others

Total Exports (FY18-19; INR Lakhs) **1,47,371**

Number of Large & Mega units **3**

Existing Clusters **No clusters currently**

1. INTRODUCTION

One of the 22 districts of Haryana, Bhiwani came into existence on 22nd December 1972.

1.1 Geography

Bhiwani is located 124 kms from Delhi and 295 kms from Chandigarh, capital of Haryana. It is surrounded by district Hisar on north, Mahendergarh district on south and district Rohtak on east. It also shares its border with Rajasthan, as some area of Jhunjunu and Churu districts lies on its west.

The climate of Bhiwani is deeply influenced by Rajasthan due to its geographical proximity to the state. The climate is dry with extreme temperatures and scanty rainfall. Rainfall generally increases from west to east, with about 75% of the average annual rainfall received between June to September.

1.2 Demographic Profile

As per the 2011 census, Bhiwani's total population is 1,634,445 persons across a geographical area of 4,778 sq. kms. Bhiwani district has a population density of 342 persons per sq. km. The population growth rate for Bhiwani in the last decade (2001-2011) was 14.70%. Bhiwani has a moderate literacy rate of 75.21%. The district's sex ratio is lower than the national average of 940, i.e. 886 females per thousand males, is marginally better than the state average of 879.

1.3 Administrative Set-up

Bhiwani district is a part of Hisar division, and has four sub-divisions (Bhiwani, Loharu, Tosham and Siwani), five tehsils (Bhiwani, Bawani Khera, Loharu, Tosham and Siwani), one sub tehsil (Behal) and four municipal committees (Bhiwani, Loharu, Tosham and Siwani).

The Deputy Commissioner is the administrative in-charge of the district and also performs the role of the District Magistrate and the District Collector.

The following table shows categorization of blocks as per the status of industrial development.

Table 134: **[Bhiwani]** Categorization of Blocks

Block A	Block B	Block C	Block D
	Bhiwani	Tosham	Loharu
			Bawani-Khera
			Kairu
			Siwani
			Bahal

2. SECTOR WISE MSME LANDSCAPE

Following table shows the total number of MSME units in each sector, in Bhiwani, along with the bifurcation of number of micro, small and medium enterprises.

The table also shows number of new units that started their commercial production in the last three financial years.

Table 1: **[Bhiwani]** No. of MSME Units in each Sector

S. No.	Industry	Total Units	Micro	Small	Medium	FY' 17	FY'18	FY'19	New Units (Last 3 Years)
Metals & Mineral Products									
1	Basic Metals	20	16	4	0	4	5	6	15
2	Fabricated Metal Products	20	18	2	0	6	4	7	17
3	Non-metallic Products	60	55	5	0	9	16	20	45
Food, Beverages & Tobacco									
4	Beverages	5	5	0	0	1	1	2	4
5	Food Products	200	177	23	0	38	59	49	146
Pharma, Petro-Chemicals, Rubber products									
6	Chemical & Chemical Products	29	27	2	0	5	5	10	20
7	Pharmaceuticals	7	7	0	0	4	1	2	7
8	Rubber & Plastic Products	63	49	14	0	18	16	9	43
9	Coke & refined products	5	3	2	0	0	0	2	2
Electrical, Electronics & Machinery									
10	Computer & electronics	13	12	1	0	2	7	4	13
11	Electrical equipment	27	22	5	0	4	7	6	17
12	Machinery and equipment	9	9	0	0	1	3	3	7
Leather, Wood & paper									
13	Furniture	38	36	2	0	3	12	11	26
14	Leather Products	12	11	1	0	1	7	1	9
15	Paper & Paper Products	17	14	3	0	4	5	3	12
16	Wood Products	16	15	1	0	3	2	6	11

Automotive & Auto-Components									
17	Motor Vehicles	4	4	0	0	1	1	0	2
18	Other transport equipment	1	0	1	0	0	0	1	1
Textiles & Apparel									
19	Textiles	67	49	18		15	18	14	47
20	Wearing Apparel	121	120	1	0	7	16	50	73
Other Manufacturing									
21	Other Manufacturing	216	176	39	1	60	43	51	154

Following scatter diagram shows the comparison between total units in each sector vis-a-vis new units opened in the last 3 financial years.

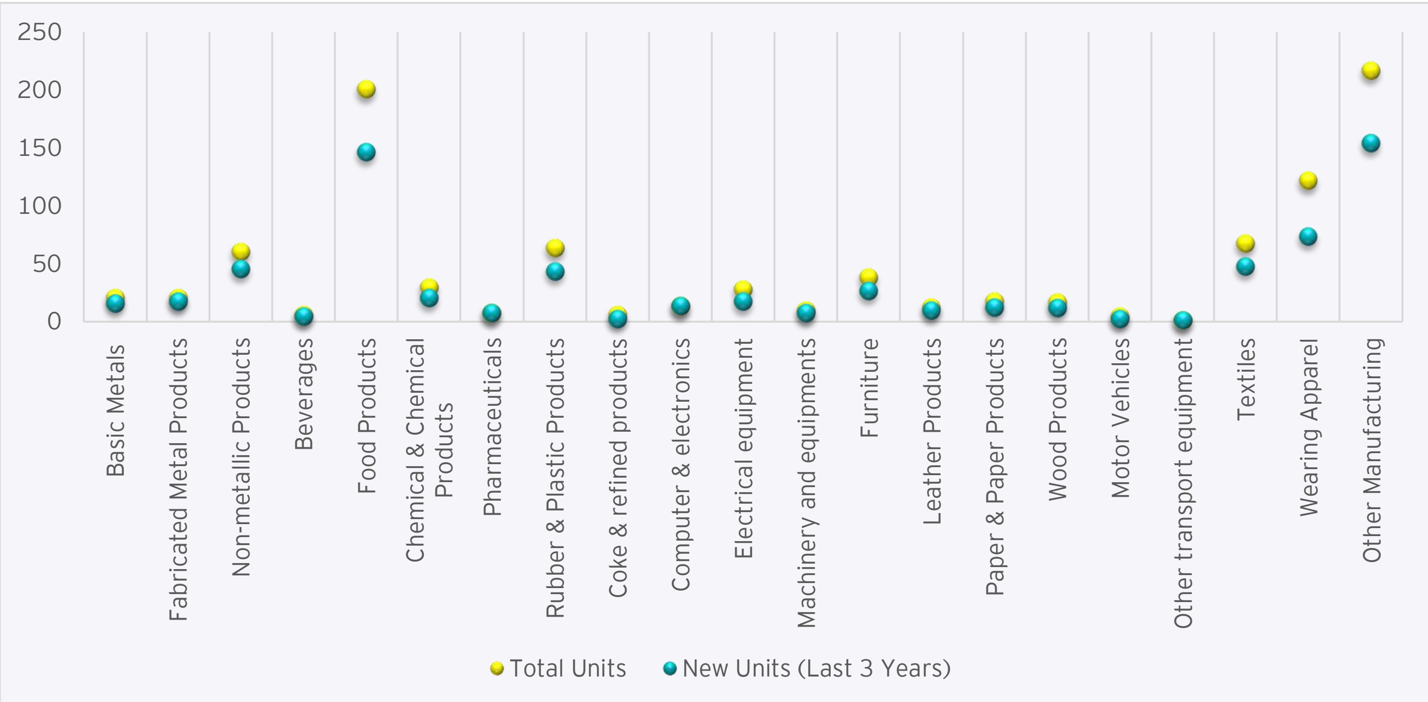


Figure 136: **[Bhiwani]** Total Units & New Units in each Sector

2.1 Top 10 Sectors: Based on Number of Units

Following table shows top ten sectors in Bhiwani, based upon the total number of MSME units in the district.

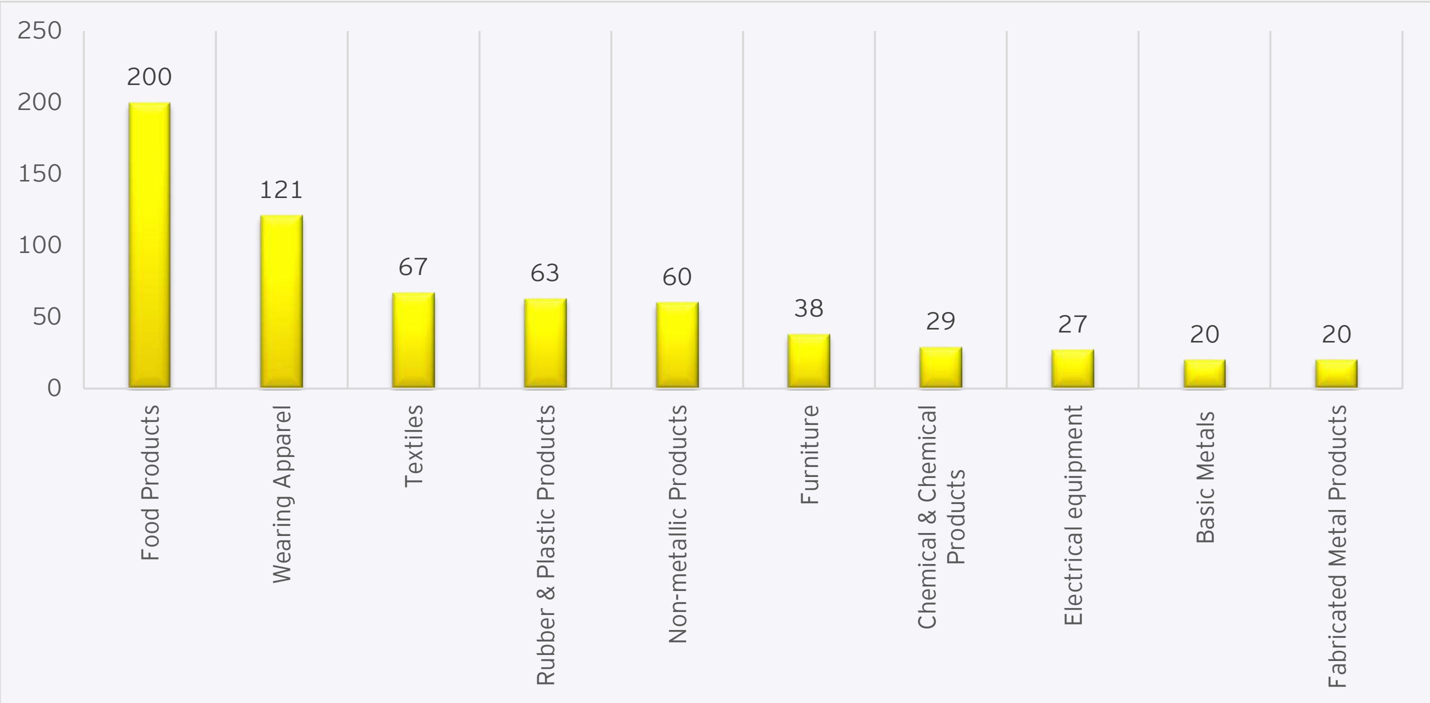


Figure 137: **[Bhiwani]** Top 10 sectors - Total No. of MSME Units

2.2 Top 10 Sectors: Based on New Units in Last 3 Years

Following table shows the top ten sectors in Bhiwani, based upon number of new MSME units set-up in the last three years.

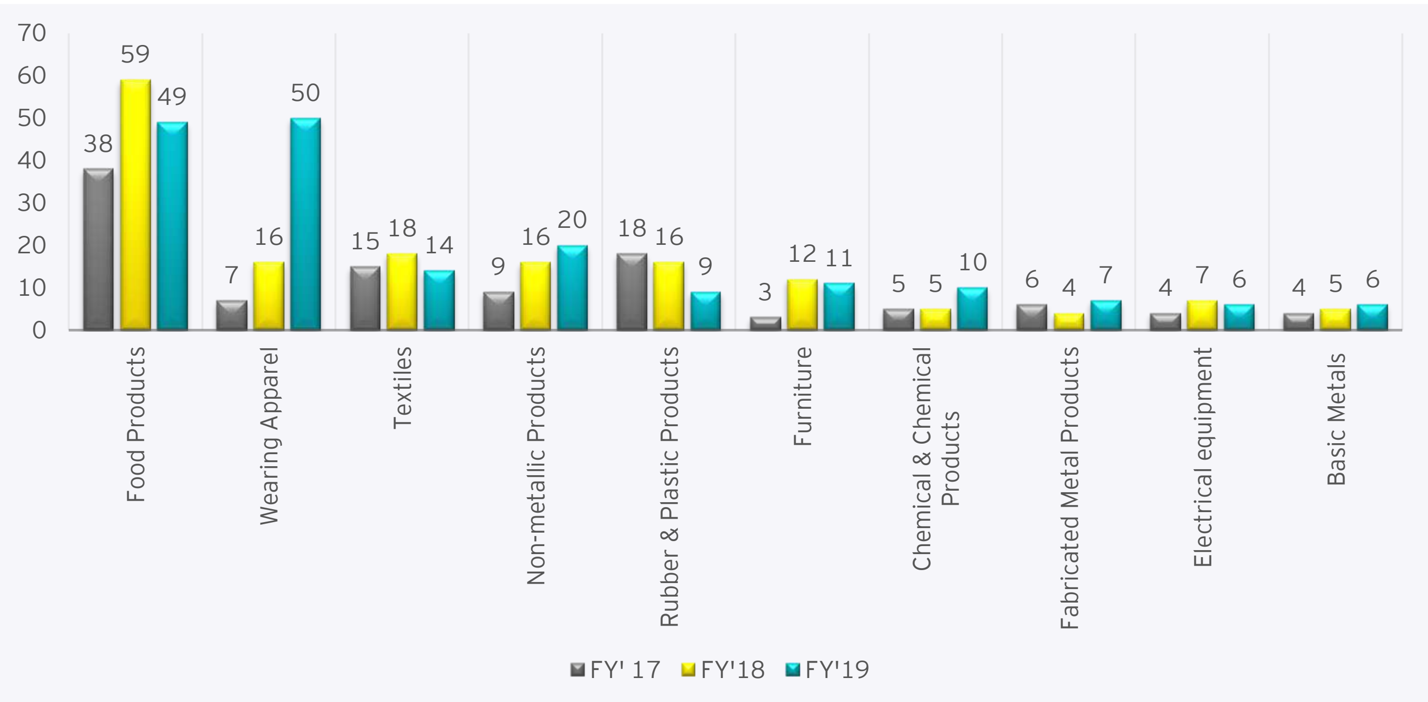


Figure 138: **[Bhiwani]** Top 10 Sectors - New Units in Last 3 Years

Key Takeaways

- Maximum number of MSME units in Bhiwani are involved in the food products and apparels sector, followed by textile.

- In the last three years as well, food products sector has seen maximum number of new MSME units opened (146), followed by wearing apparel (73) and textiles (47).

- In terms of the percentage growth, pharmaceuticals and computer & electronics sectors in Bhiwani have experienced impressive recent growth with 100% of the total units having opened up in the last 3 years, followed by other transport equipment and fabricated metal products.

3. SECTOR WISE INVESTMENT SCENARIO

Punjab National Bank is the convener bank of State Level Bankers' Committee (SLBC) in Haryana and also the district lead bank of Bhiwani.

Following table shows the total Investment by MSMEs in each sector in Bhiwani, along with new investment in the last three financial years (figures are in Lakhs).

Table 135: **[Bhiwani]** Total Investment by MSMEs

S. No.	Industry	Investment (INR Lakhs)				
		Total Investment	FY'17	FY'18	FY'19	New Investment (Last 3 Years)
Metals & Mineral Products						
1	Basic Metals	529	36	47	319	402
2	Fabricated Metal Products	200	94	29	50	173
3	Non-metallic Products	1158	114	369	233	716
Food, Beverages & Tobacco						
4	Beverages	35	8	15	11	34
5	Food Products	3553	711	682	837	2230
Pharma, Petro-Chemicals, Rubber products						
6	Chemical & Chemical Products	236	47	51	108	206
7	Pharmaceuticals	61	32	25	4	61
8	Rubber & Plastic Products	1787	541	511	248	1300

9	Coke & refined products	157	0	0	35	35
Electrical, Electronics & Machinery						
10	Computer & electronics	134	8	105	21	134
11	Electrical equipment	590	36	171	205	412
12	Machinery and equipments	93	25	19	9	53
Leather, Wood & paper						
13	Furniture	357	30	69	35	134
14	Leather Products	87	2	70	2	74
15	Paper & Paper Products	281	107	88	29	224
16	Wood Products	111	14	22	14	50
Automotive & Auto-Components						
17	Motor Vehicles	9	4	2	0	6
18	Other transport equipment	80	0	0	80	80
Textiles & Apparel						
19	Textiles	2313	390	273	627	1290
20	Wearing Apparel	293	34	43	101	178
Other Manufacturing						
21	Other Manufacturing	6549	3164	1060	739	4963

Following scatter diagram shows a comparison of total MSME investment and new investment in the last 3 financial years, across different sectors of Bhiwani.

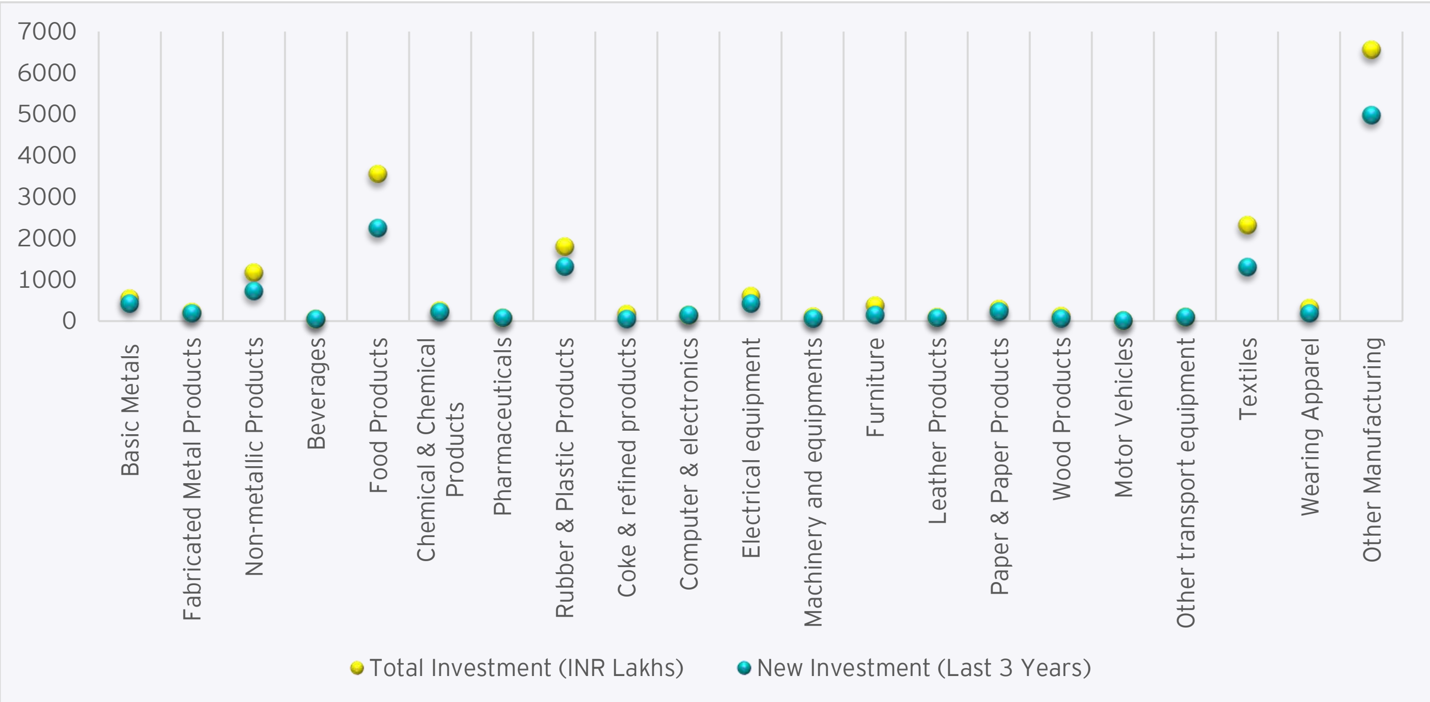


Figure 139: **[Bhiwani]** Total Investment & New Investment in Last 3 Financial Years (FY'17-FY'19)

Following pie-chart showcases the sectors that have attracted maximum investments in the last 3 financial years (figures are in Lakhs).

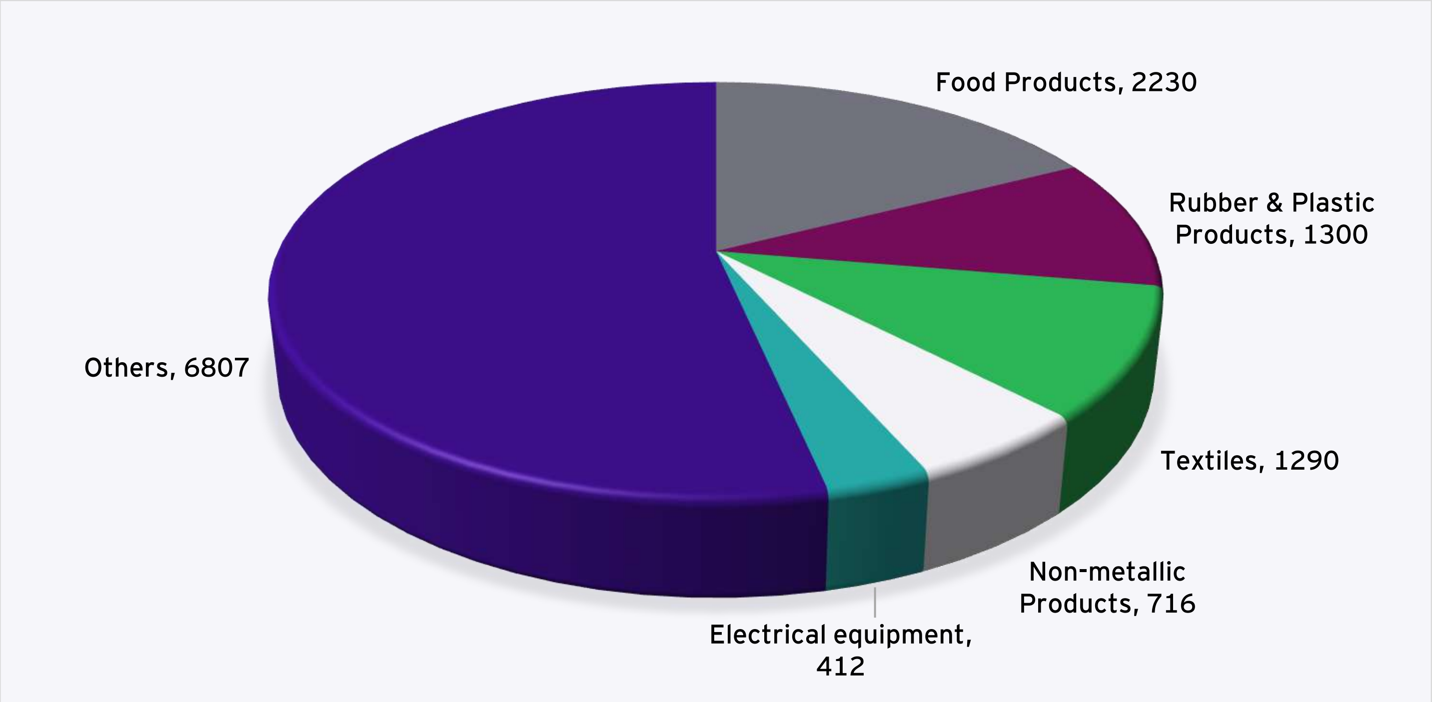


Figure 140: **[Bhiwani]** Top 5 Sectors with maximum investment in last 3 Financial Years (FY'17-FY'19)

Following diagram shows a comparison of compound annual growth rate of various sectors for last three financial years.

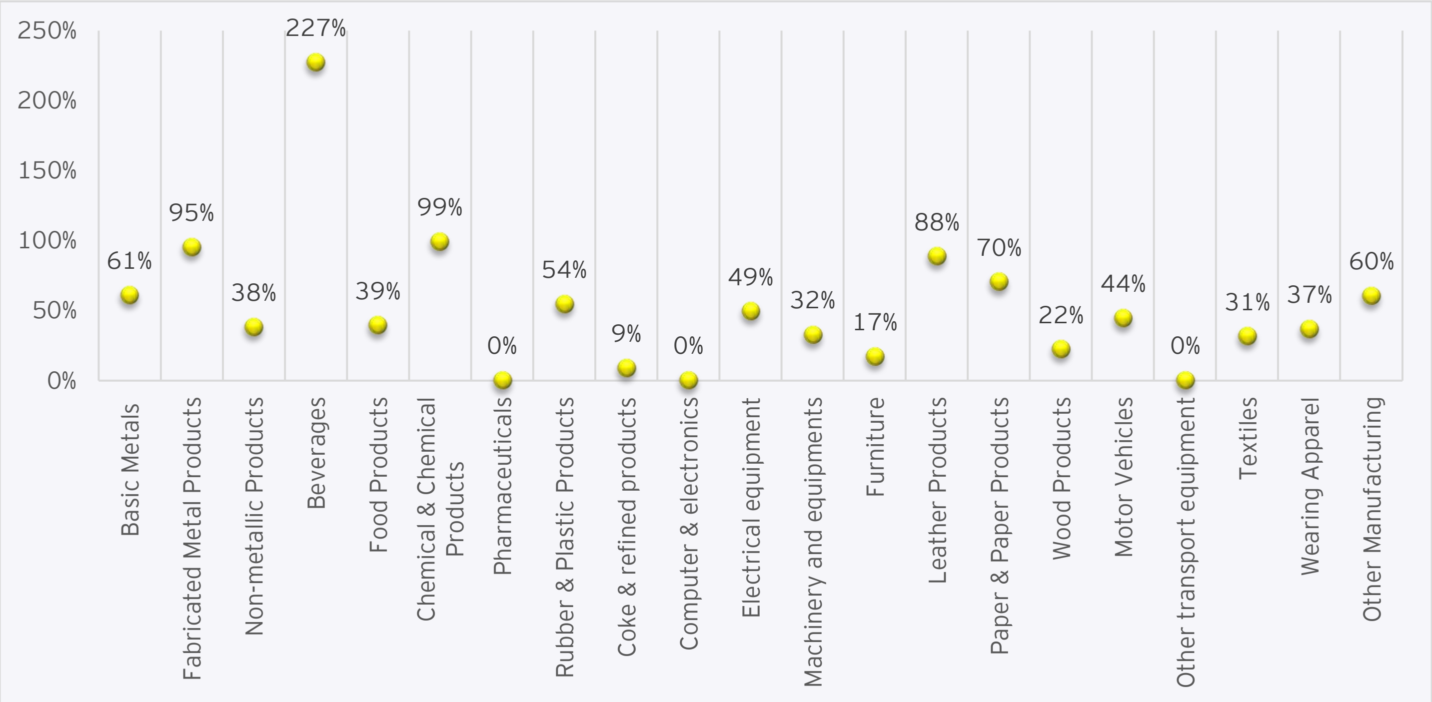


Figure 141: **[Bhiwani]** CAGR for Last 3 Financial Years (FY'17-FY'19)

Key Takeaways

- Highest amount of investment by MSMEs in Bhiwani has been in food products sector (INR 35.53 Cr.), followed by textiles sector (INR 23.13 Cr.).
- Besides being the sector with highest total investment, food products also attracted maximum investment in the last three financial years (INR 22.30 Cr.) followed by rubber and plastic products (INR 13.00 Cr.).
- Sectors with high CAGR in MSME investments in the last 3 FYs are: beverages (227%), chemical and chemical products (99%), fabricated metal products (95%), leather products (88%) and paper and paper products (70%).

4. SECTOR WISE EMPLOYMENT SCENARIO

Below table showcases the total employment created by MSMEs in each of the sectors, along with new employment created in the last three financial years.

Table 136: **[Bhiwani]** Total Employment in each Sector

S. No.	Industry	Total employment	FY'17	FY'18	FY'19	New Employment (Last 3 Years)
Metals & Mineral Products						
1	Basic Metals	186	25	30	55	110
2	Fabricated Metal Products	91	38	10	29	77
3	Non-metallic Products	550	86	206	178	470
Food, Beverages & Tobacco						
4	Beverages	46	5	15	24	44
5	Food Products	1047	286	263	242	791
Pharma, Petro-Chemicals, Rubber products						
6	Chemical & Chemical Products	131	16	47	39	102
7	Pharmaceuticals	29	21	5	3	29
8	Rubber & Plastic Products	542	168	110	80	358
9	Coke & refined products	46	0	0	20	20
Electrical, Electronics & Machinery						
10	Computer & electronics	45	6	28	11	45
11	Electrical equipment	180	15	44	43	102
12	Machinery and equipments	65	20	11	4	35
Leather, Wood & paper						
13	Furniture	154	17	36	30	83

14	Leather Products	66	4	52	5	61
15	Paper & Paper Products	104	20	24	18	62
16	Wood Products	41	9	6	9	24
Automotive & Auto-Components						
17	Motor Vehicles	6	2	1	0	3
18	Other transport equipment	5	0	0	5	5
Textiles & Apparel						
19	Textiles	510	146	146	93	385
20	Wearing Apparel	227	19	42	86	147
Other Manufacturing						
21	Other Manufacturing	1421	463	229	268	960

Following scatter diagram shows a comparison of total employment across different MSME sectors and new employment generated in the last 3 financial years.

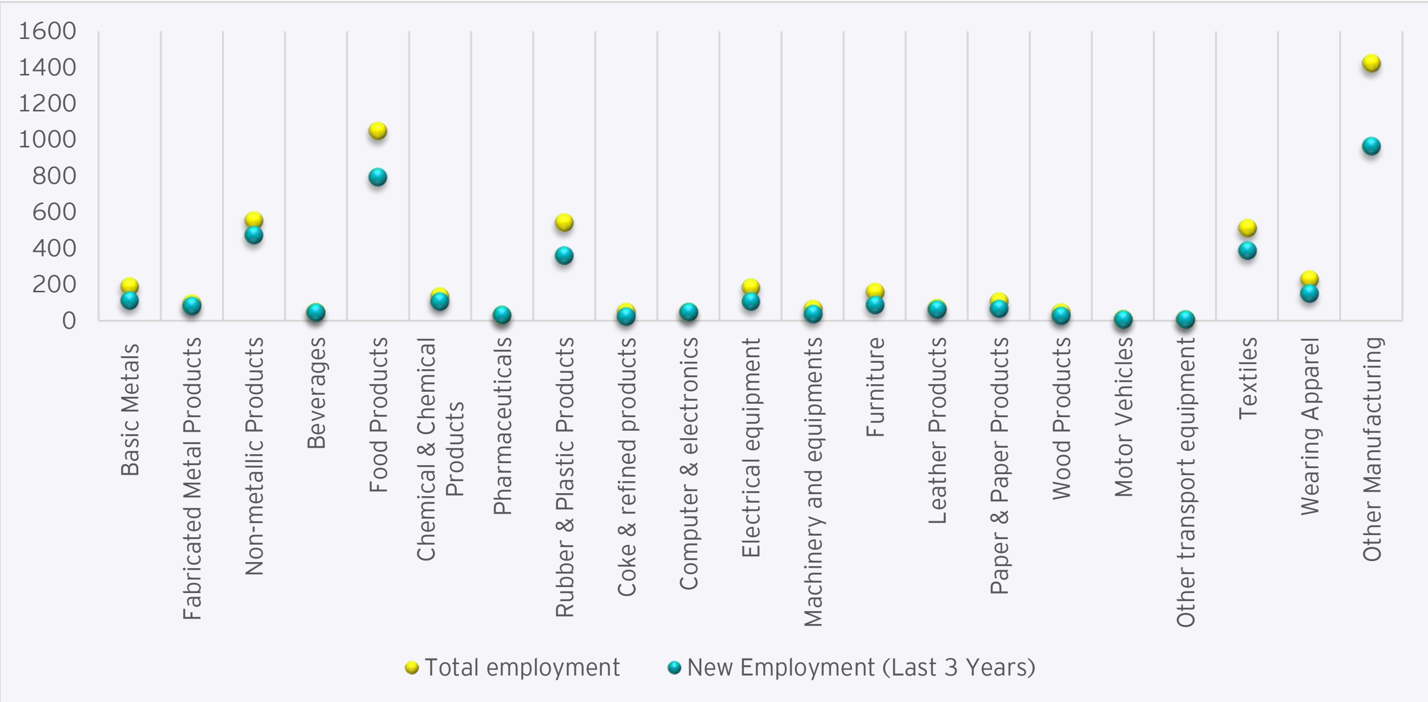


Figure 142: **[Bhiwani]** Total Employment & New employment in last 3 Financial Years (FY'17-FY'19)

Following bar chart showcases category wise per unit employment analysis for MSMEs in Bhiwani.

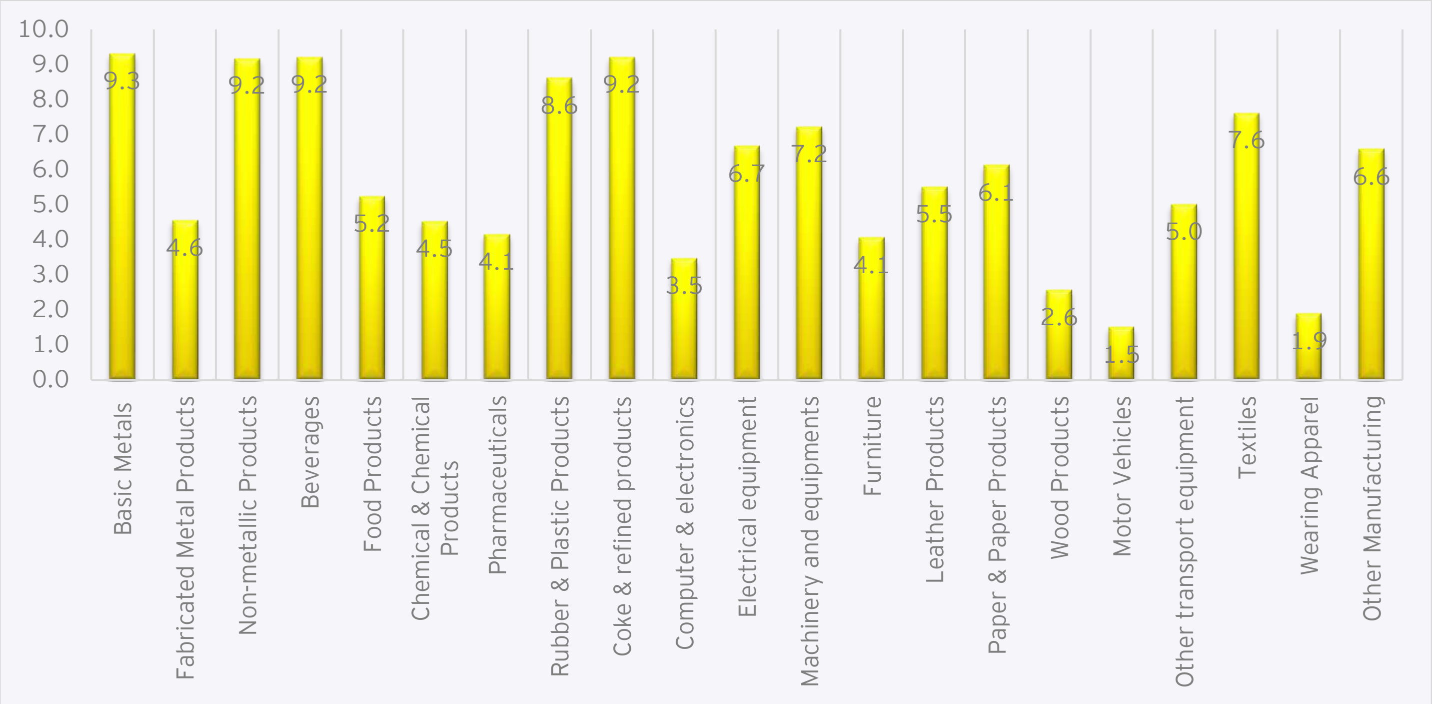


Figure 143: **[Bhiwani]** Category wise employment intensity

Following pie-charts showcase the sectors that have created maximum employment in each of the last 3 financial years.

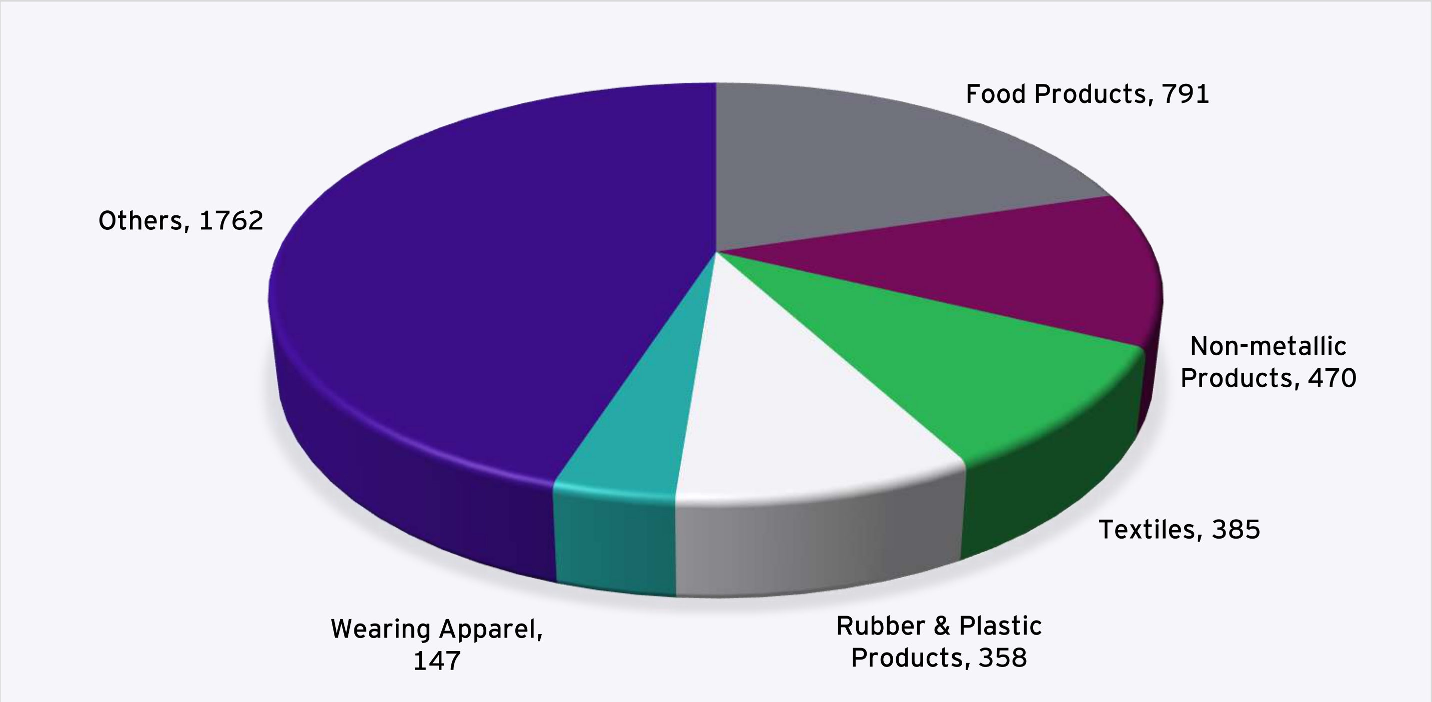


Figure 144: **[Bhiwani]** Top 5 Sectors with maximum new employment in last 3 Financial Years (FY'17-FY'19)

Key Takeaways

- Food products MSME sector provides the maximum employment (1047) followed by non-metallic products sector (550) and rubber & plastic products sector (542).
- Further, food products MSME sector has also created the maximum new employment in last 3 years (791), followed by non-metallic products (470) & textiles (385).
- Manufacturers of basic metal products have maximum employment intensity with an average of 9.3 employees per unit, followed by manufacturers of beverages with 9.2 employees per unit and manufacturers of basic metals at 9.2 employees per unit.
- Motor vehicles sector has the least employment intensity with only 1.5 employees per unit, followed by wearing apparel at 1.9 employees per unit.
- Sectors such as motor vehicles and other transport equipment products, have experienced relatively low growth in new employment.

5. EXPORTS FROM THE DISTRICT

Key exports products from Bhiwani include refined guar gum splits, PV blended fabrics/yarn and galvanized steel strips.

Exports worth **INR 97,566.74 Lakhs and INR 1,47,370.77 Lakhs** were reported from Bhiwani in the year 2017-2018 and 2018-2019, respectively.

(The export data in the table shows only exports related information that is available at the District Industries Centre, Bhiwani, and actual exports figure might be significantly higher).

6. NATURAL RESOURCES & RAW MATERIAL AVAILABLE

Bhiwani district is mostly sandy, undulating plain with presence of sand dunes of various shapes and sizes. The district is formed of alluvium, and a major part of the district is covered by recent to sub-recent deposits of alluvium and blown sand.

The district falls in the arid zone of Haryana. There is neither a perennial nor any seasonal river/stream in the district. The water channels present in the district are canals/distributaries/minors etc.

In terms of vegetation, mainly thorny trees are found in Bhiwani like Babool, Jandi, Kair, along with Neem, Shisham, Peepal etc.

The main kharif crops in Bhiwani are bajara and cotton. The main rabi crops are wheat & sarson.

Some of the minerals found in Bhiwani are building stone, gypsum or flexible stones.

7. KEY INDUSTRIAL ESTATES

There are two major industrial estates in district Bhiwani.

Table 137: Key Industrial Estates in Bhiwani

S. No.	Name of Industrial Area	Number of Plots/Sheds
1	HUDA Sector -21	134
2	HUDA Sector -26	220

8. MAJOR LARGE-SCALE UNITS

Apart from MSMEs, Bhiwani doesn't have a significant presence of Large & Mega enterprises. Below table showcases number of Large & Mega enterprises in each sector along with their names.

Table 138: **[Bhiwani]** Large & Mega Units in each Sector

S. No.	Industry	Number	Names of Large & Mega Units
1	Chemical and Chemical Products	2	• Hindustan Gum & Chemicals Ltd. • Birla Colony Bhiwani
2	Textiles	1	• B.T.M. (Grasim Bhiwani Textiles Ltd.)

9. SERVICES SECTOR SNAPSHOT

Below table gives snapshot of the services sector in Bhiwani:

Table 139: **[Bhiwani]** Services Sector Snapshot

S. No.	Industry	Total Units	Micro	Small	Medium	Total Investment (INR Lakhs)	Total employment
1	Accommodation	5	3	2		43	21
2	Activities of head offices; management consultancy activities	9	9			24	15
3	Activity membership organization	5	5			19	20
4	Advertising and market research	6	5	1		216	44
5	Architecture and engineering activities; technical testing and analysis	15	15			33	24
6	Civil Engineering	14	10	4		347	185
7	Computer programming, consultancy and related activities	29	27	2		170	133
8	Construction of building	9	8	1		82	72
9	Creative, arts and entertainment activities	2	2			2	2
10	Education	103	86	17		619	605
11	Employment activities	3	3			4	26
12	Financial service activities, except insurance and pension funding	10	10			19	23

13	Food and beverage service activities	69	61	7	1	718	214
14	Human health activities	36	23	11	2	1462	263
15	Information service activities	20	19		1	564	50
16	Land transport and transport via pipelines	69	34	35		2105	329
17	Other financial activities	11	10	1		68	28
18	Other Personal Service Activities	147	141	6		458	272
19	Other Services including Repairing, Postal, Social Work, Real Estate, Water Treatment etc.	111	104	7		573	265

10. CLUSTERS SCENARIO

There are no clusters in Bhiwani presently.

A large number MSME units in the district are involved in food products, wearing apparels and textile industries. Hence, there is a potential for cluster development within these industries.

11. INDUSTRY ASSOCIATIONS

There are six industrial associations in Bhiwani:

Table 140: Industry Associations in Bhiwani

S. No.	Name of Association	Name of President	Address	Contact
1	Zila Udyog Sangh	Sh. Shailender Jain	Industrial Area, Bhiwani	9215851400
2	Bhiwani Surgical MFRS. & Traders Association	Sh. K.K. Bhardwaj	Plot No. 130 Sector-21, Industrial Area, Bhiwani	9416057501
3	Bhiwani Industrial Association (Regd.)	Sh. Dharamvir Nehra	No. 2735 Industrial area Bhiwani	9315374522

4	Bhiwani Chamber of Commerce and Industries	Sh. Pawan Bawaniwala	Sector 22 Industrial area Bhiwani	9812196000
5	Laghu Udyog Sangh	Sh. Hari Ram Khudania	C/o Shiv Shakti Wire and Drawing Industries Ch.Dadri	9812686226
6	Laghu Udyog Bharti Branch	Sh. Tilak Jain	Industrial Area, Bhiwani	09812020092

12. KEY ISSUES OF THE INDUSTRIES

Some of the key issues impacting Industries in Bhiwani are:

- District Bhiwani has significant footprints of textile units. However, the district has failed to attract new investment in this sector compared to the neighboring districts Panipat and Gurgaon, which are also known textile hubs.
    - Some of the prominent units have shut their operations, like Saraswati Mill, T.I.T mill while others are suffering from low growth rate, for instance Grasim Bhiwani Textile Ltd. and Chinar, Synthetic
    - Measures should be taken to revive the textile industry of district Bhiwani and position it as the leading textile destination of Haryana.
- Plastic industries of district Bhiwani have also witnessed a slowdown in growth because of lack of market.
- Bhiwani district is a part of NCR, which can be leveraged for mutually beneficial economic growth like the common economic zone, alternate wholesale market for auto parts, the peripheral expressways and so on.
    - So, a time bound action plan is necessary on the part of NCRPB to implement the proposals.

13. POTENTIAL AREAS OF INTERVENTION

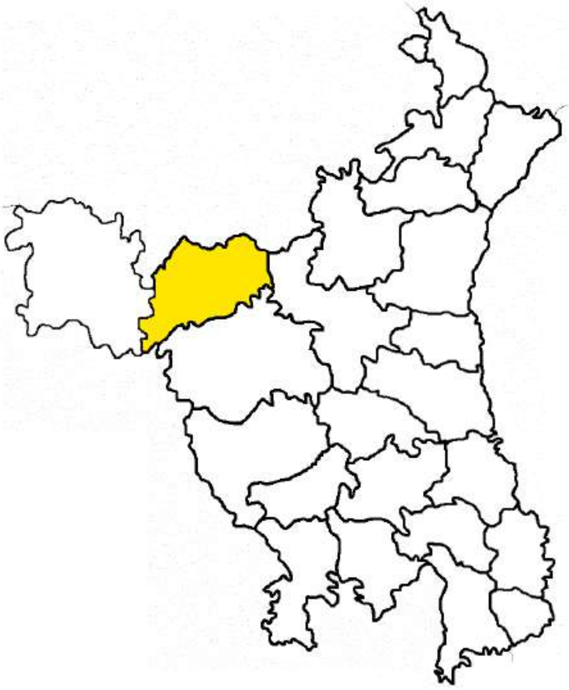
- Cluster based hard & soft interventions may be explored for further growth of Textile sector in Bhiwani
- Marketing support in form of common display centers or knowledge seminars on new age sales/marketing techniques such as digital marketing, e-commerce etc. may be convened for the Bhiwani Plastic Industry
- Given lower land costs in Bhiwani compared to many areas in NCR, it can be leveraged to attract new investments in the district from large & mega players especially in sectors such as Food Products, Textiles, Rubber & Plastic Products etc.

14. POTENTIAL AREAS OF INVESTMENT

- Bhiwani has a significant presence in food products sector with around 200 MSMEs and is a fast-growing sector with 146 new units starting operations in last 3 financial years. Sector offers attractive investment opportunity in plants supplying secondary & tertiary level raw material supplies to these units.
- Given proactive support from govt. to train local manpower on Industry specific skills such as Textiles/ Plastic/ non-metallic mineral products Industry etc., further investment can be attracted in these sectors if adequate infrastructure is provided.

17. Fatehabad

District Profile



EXECUTIVE SUMMARY

District Profile

MSME Scenario

17

Fatehabad

Famous for....

"Agri Implements Industry"

1 MSMEs in Fatehabad

Total number of MSME units **829**

New MSME units (last 3 years) **272**

Food Products · Furniture · Wearing Apparel · Machinery & Equipment · Non-metallic products

Top 5 sectors – Maximum number of MSMEs

2 Investment Scenario in Fatehabad

Total Investment (INR Lakhs) **14,770**

New Investment (last 3 years; INR Lakhs) **5,113**

Food Products · Wood Products · Machinery & Equipment · Rubber & Plastic products · Chemicals & chemical products

Top 5 sectors – Maximum investment by MSMEs

3 Employment Scenario in Fatehabad

Total Employment **4,717**

New Employment (last 3 years) **1,461**

Food Products · Non-metallic products · Machinery & Equipment · Wood Products · Furniture

Top 5 sectors – Most employment generated

4 Potential for MSMEs

Furniture industry offers opportunity for further investments In downstream value chain products such as branded furniture and retailing

Food products sector also offers significant investment opportunity in product diversification such as long shelf life foods & ready-to-eat food products

5 Others

Total Exports (FY 18-19; INR Lakhs) **41,169**

Number of Large & Mega units **0**

Existing Clusters **No clusters currently**

1. INTRODUCTION

The district Fatehabad was carved out of Hisar district on 15 July 1997. The district got its name from the headquarters, Fatehabad which was named after the son of Firoz Shah Tuglak, Fateh Khan. Fatehabad is one of the smallest districts of Haryana.

It has a rich history, and finds several mentions by Panini and in Puranas.

1.1 Geography

Fatehabad lies in the south western part of Haryana and is surrounded by Punjab in north, Hisar in south and Jind in east. On the west of Hisar district is Rajasthan and Sirsa district.

It constitutes 5.4% of the state share in terms of geographical area. The district has tropical climate with intensive hot summer and cool winter. It has a short south-west monsoon period, when it receives over 70% of the annual normal rainfall. July and August are the rainiest months in Fatehabad.

1.2 Demographic Profile

As per the 2011 census, Fatehabad's total population is 942,011 persons across a geographical area of 2,538 sq. kms. Fatehabad district has a population density of 371 persons per sq. km. The population growth rate for Fatehabad in the last decade (2001-2011) was 16.85%. Fatehabad has an average literacy rate of 67.92%. The district's sex ratio is lower than the national average of 940, i.e. 902 females per thousand males, but is better than the state average of 879.

1.3 Administrative Set-up

The Fatehabad district comprises of three sub divisions – Fatehabad, Tohana and Ratia. A sub-division is headed by Sub Division Magistrate (SDM). The district consists of 7 blocks headed by a Block Development Officer (Fatehabad, Tohana, Ratia, Nagpur, Bhuna, Bhattu Kalan and Jakhal).

Deputy Commissioner is the overall administrative in-charge. He is responsible for 3 key functions as he also acts as the District Magistrate and the Collector.

The following table shows categorization of blocks as per the status of industrial development.

Table 141: **[Fatehabad]** Categorization of Blocks

Block A	Block B	Block C	Block D
		Fatehabad	Bhattu Kalan
		Tohana	Jakhal
		Ratia	Bhuna
		Nagpur	

2. SECTOR WISE MSME LANDSCAPE

Following table shows the total number of MSME units in each sector, in Fatehabad, along with the bifurcation of number of micro, small and medium enterprises.

The table also shows number of new units that started their commercial production in the last three financial years.

Table 142: **[Fatehabad]** No. of MSME Units in each Sector

S. No.	Industry	Total Units	Micro	Small	Medium	FY' 17	FY'18	FY'19	New Units (Last 3 Years)
Metals & Mineral Products									
1	Basic Metals	27	23	4	0	2	4	7	13
2	Fabricated Metal Products	19	19	0	0	1	3	1	5
3	Non-metallic Products	39	31	8	0	8	4	10	22
Food, Beverages & Tobacco									
4	Beverages	2	1	1	0	0	0	1	1
5	Food Products	239	166	73	0	17	32	32	81
Pharma, Petro-Chemicals, Rubber products									
6	Chemical & Chemical Products	32	28	4	0	3	15	3	21
7	Pharmaceuticals	9	7	2	0	0	5	2	7
8	Rubber & Plastic Products	22	15	7	0	1	2	2	5
Electrical, Electronics & Machinery									
9	Computer & electronics	12	10	2	0	1	5	2	8
10	Electrical equipment	17	13	4	0	2	2	3	7
11	Machinery & equipments	48	36	12	0	2	4	3	9
Leather, Wood & paper									
12	Furniture	77	75	2	0	4	5	4	13
13	Leather Products	6	4	2	0	0	2	2	4
14	Paper & Paper Products	6	4	2	0	0	2	1	3
15	Wood Products	38	30	7	1	0	1	1	2
Automotive & Auto-Components									
16	Motor Vehicles	3	3	0	0	0	0	0	0
17	Other transport equipment	2	2	0	0	0	2	0	2
Textiles & Apparel									
18	Textiles	25	16	9	0	2	2	5	9
19	Wearing Apparel	64	63	1	0	3	6	10	19

Other Manufacturing									
20	Other Manufacturing	142	123	19	0	11	12	18	41

Following scatter diagram shows the comparison between total units in each sector vis-a-vis new units opened in the last 3 financial years.

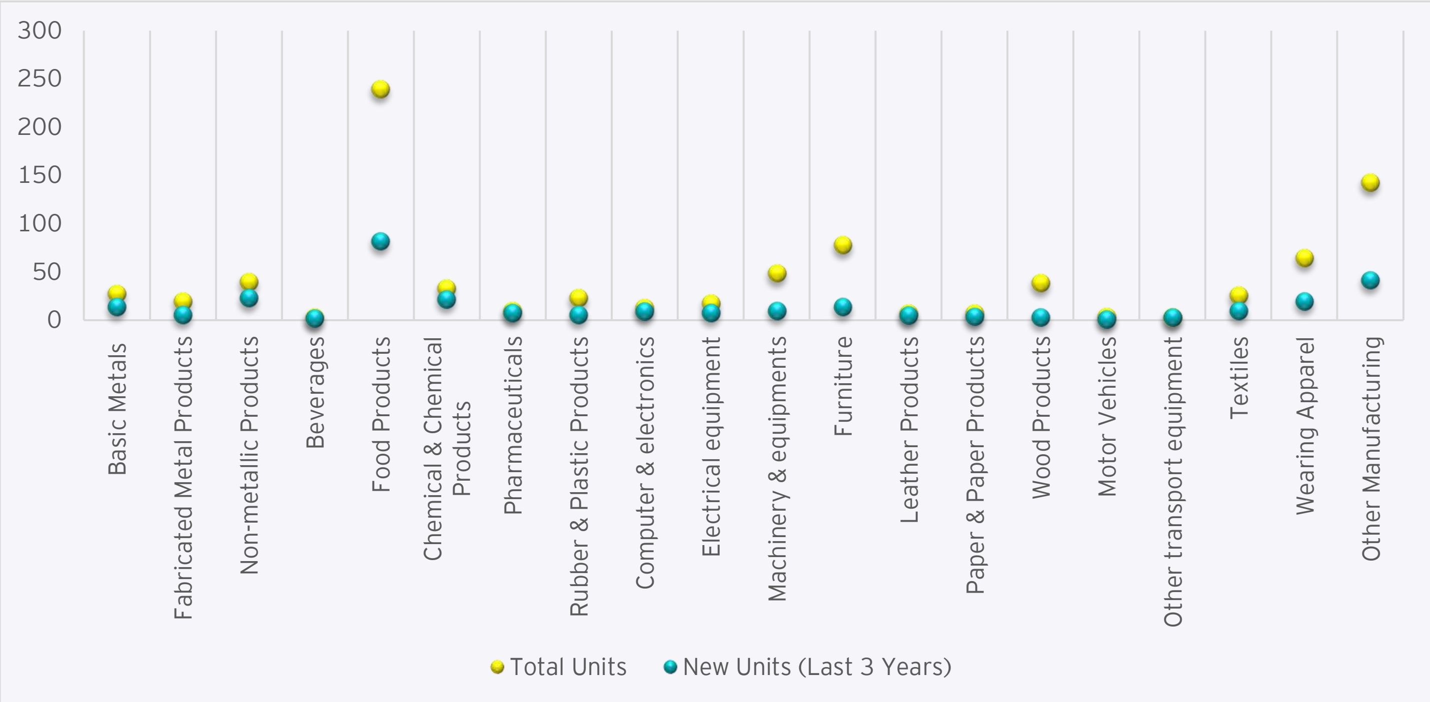


Figure 145: **[Fatehabad]** Total Units & New Units in each Sector

2.1 Top 10 Sectors: Based on Number of Units

Following table shows top ten sectors in Fatehabad, based upon the total number of MSME units in the district.

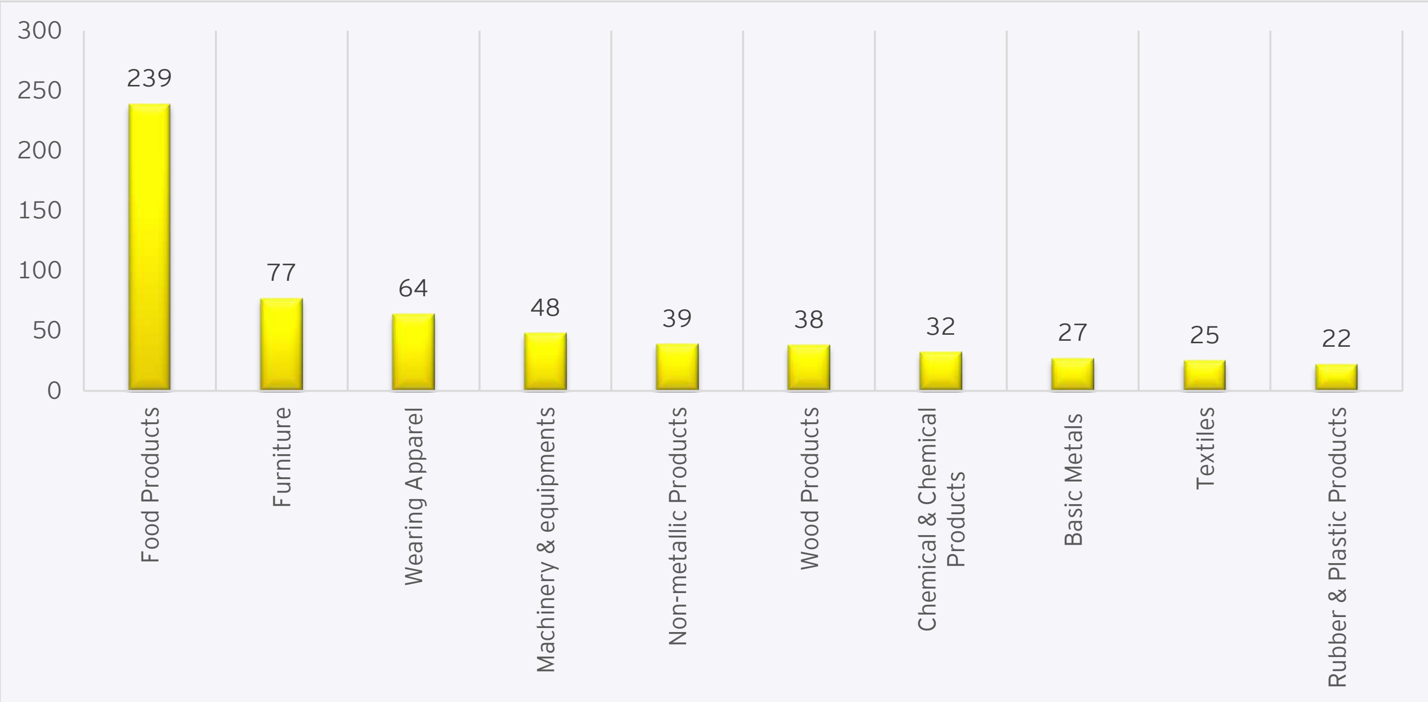


Figure 146: **[Fatehabad]** Top 10 sectors - Total No. of MSME Units

2.2 Top 10 Sectors: Based on New Units in Last 3 Years

Following table shows the top ten sectors in Fatehabad, based upon number of new MSME units set-up in the last three years.

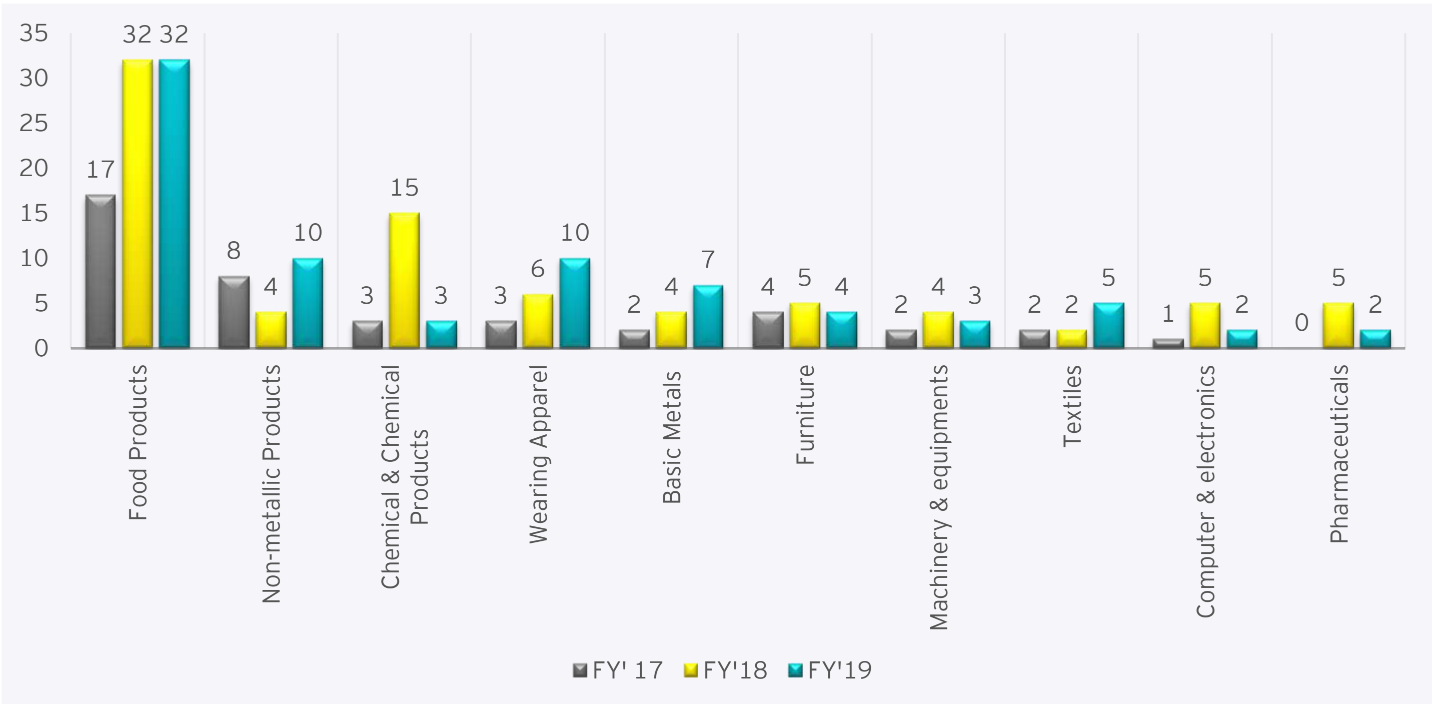


Figure 147: **[Fatehabad]** Top 10 Sectors - New Units in Last 3 Years

Key Takeaways

- Maximum number of MSME units in Fatehabad are involved in the food products, furniture sector, followed by wearing apparels.

- In the last three years as well, food products sector has seen maximum number of new MSME units opened (81), followed by non-metallic products (22) and chemical and chemical products (21).

- In terms of the percentage growth, other transport equipment and pharmaceuticals sectors have experienced impressive recent growth with 100% and 78% of the total units, respectively, having opened-up in the last 3 years, followed by computer and electronics.

3. SECTOR WISE INVESTMENT SCENARIO

Punjab National Bank is the convener bank of State Level Bankers' Committee (SLBC) in Haryana and also the district lead bank of Fatehabad.

Following table shows the total Investment by MSMEs in each sector in Fatehabad, along with new investment in the last three financial years.

Table 143: **[Fatehabad]** Total Investment by MSMEs

S. No.	Industry	Investment (INR Lakhs)				
		Total Investment	FY'17	FY'18	FY'19	New Investment (Last 3 Years)
Metals & Mineral Products						
1	Basic Metals	540	6	19	16	41
2	Fabricated Metal Products	177	5	20	25	50
3	Non-metallic Products	536	117	65	104	286
Food, Beverages & Tobacco						
4	Beverages	195	0	80	0	80
5	Food Products	5635	690	704	1090	2484
Pharma, Petro-Chemicals, Rubber products						
6	Chemical & Chemical Products	599	72	38	27	137
7	Pharmaceuticals	61	0	26	28	54

8	Rubber & Plastic Products	853	2	56	423	481
Electrical, Electronics & Machinery						
9	Computer & electronics	147	50	9	5	64
10	Electrical equipment	262	14	19	34	67
11	Machinery & equipment	868	8	36	29	73
Leather, Wood & paper						
12	Furniture	310	23	10	26	59
13	Leather Products	15	0	3	5	8
14	Paper & Paper Products	113	0	8	3	11
15	Wood Products	1438	0	92	95	187
Automotive & Auto-Components						
16	Motor Vehicles	41	0	0	0	0
17	Other transport equipment	15	0	9	0	9
Textiles & Apparel						
18	Textiles	114	7	8	23	38
19	Wearing Apparel	249	42	25	28	95
Other Manufacturing						
20	Other Manufacturing	2602	230	255	404	889

Following scatter diagram shows a comparison of total MSME investment and new investment in the last 3 financial years, across different sectors of Fatehabad.

Figure 148: **[Fatehabad]** Total Investment & New Investment in Last 3 Financial Years (FY'17-FY'19)

Following pie-chart showcases the sectors that have attracted maximum investments in the last 3 financial years (figures are in Lakhs).

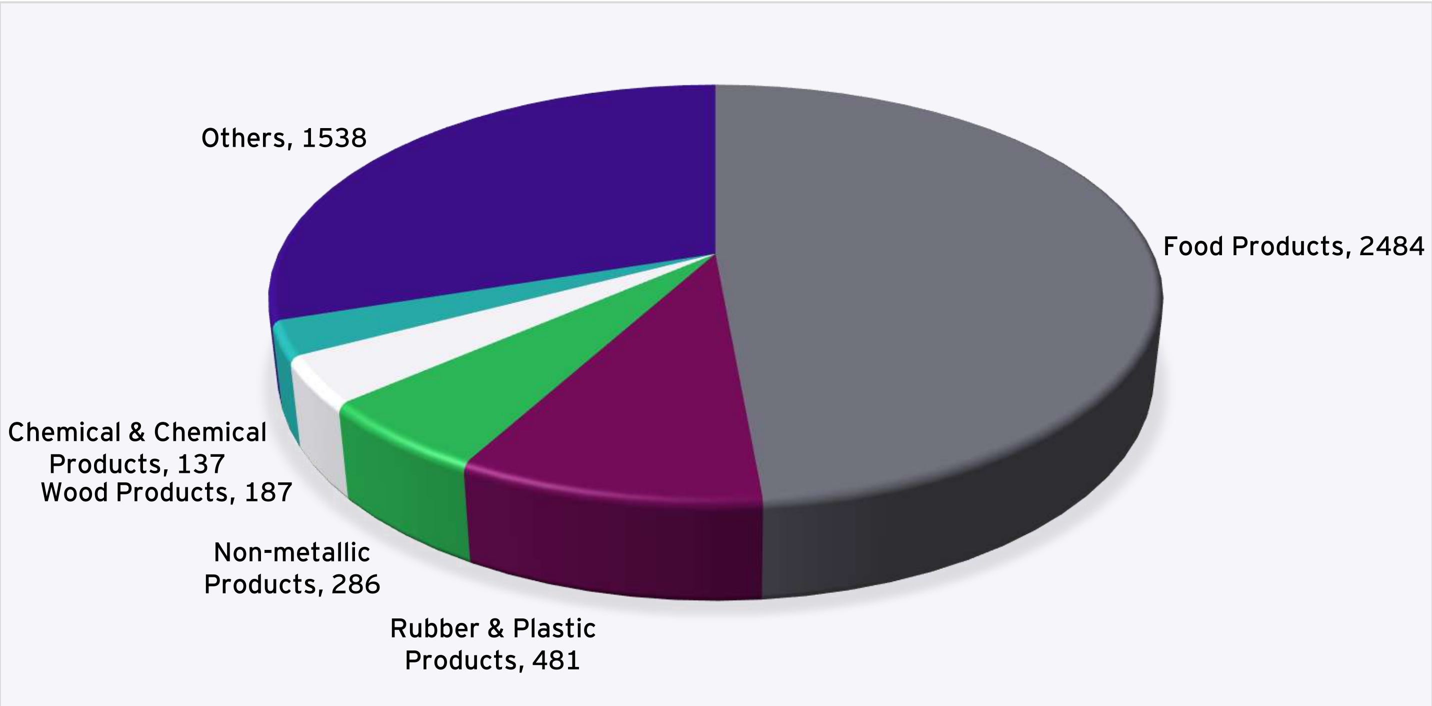


Figure 149: **[Fatehabad]** Top 5 Sectors with maximum investment in last 3 Financial Years (FY'17-FY'19)

Following diagram shows a comparison of compound annual growth rate of various sectors for last three financial years.

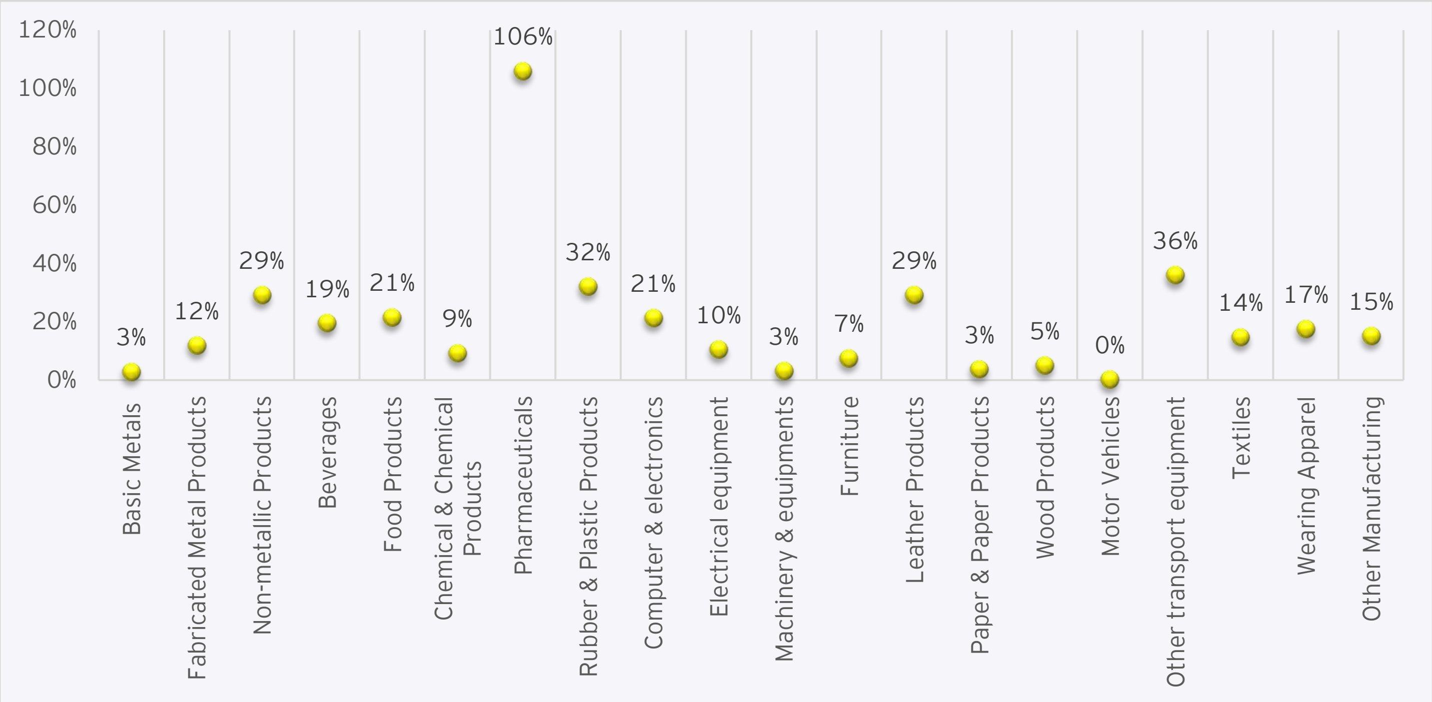


Figure 150: **[Fatehabad]** CAGR for Last 3 Financial Years (FY'17-FY'19)

Key Takeaways

- Highest amount of investment by MSMEs in Fatehabad has been in food products sector (INR 56.35 Cr.), followed by wood products sector (INR 14.38 Cr.).
- Besides being the sector with highest total investment, food products along with rubber and plastic products sector also attracted maximum investment in the last three financial years (INR 24.84 Cr. and INR 4.81 Cr. respectively).
- Sectors with high CAGR in MSME investments in the last 3 FYs are: pharmaceuticals (106%), other transport equipment (36%), rubber and plastic products (32%), non-metallic products (29%) and leather products (29%).

4. SECTOR WISE EMPLOYMENT SCENARIO

Below table showcases the total employment created by MSMEs in each of the sectors, along with new employment created in the last three financial years.

Table 144: **[Fatehabad]** Total Employment in each Sector

S. No.	Industry	Total employment	FY'17	FY'18	FY'19	New Employment (Last 3 Years)
Metals & Mineral Products						
1	Basic Metals	109	5	12	6	23
2	Fabricated Metal Products	89	5	11	7	23
3	Non-metallic Products	514	132	56	94	282
Food, Beverages & Tobacco						
4	Beverages	26	0	16	0	16
5	Food Products	1349	117	133	142	392
Pharma, Petro-Chemicals, Rubber products						
6	Chemical & Chemical Products	223	18	15	26	59
7	Pharmaceuticals	47	0	19	22	41
8	Rubber & Plastic Products	153	1	23	32	56
Electrical, Electronics & Machinery						
9	Computer & electronics	70	15	14	7	36
10	Electrical equipment	91	9	12	15	36
11	Machinery & equipment	432	7	20	14	41
Leather, Wood & paper						
12	Furniture	266	18	15	22	55
13	Leather Products	12	0	7	4	11
14	Paper & Paper Products	39	0	87	1	88
15	Wood Products	310	0	9	25	34
Automotive & Auto-Components						
16	Motor Vehicles	11	0	0	0	0
17	Other transport equipment	14	0	11	0	11
Textiles & Apparel						
18	Textiles	66	2	3	18	23
19	Wearing Apparel	153	11	13	29	53
Other Manufacturing						
20	Other Manufacturing	743	50	49	82	181

Following scatter diagram shows a comparison of total employment across different MSME sectors and new employment generated in the last 3 financial years.

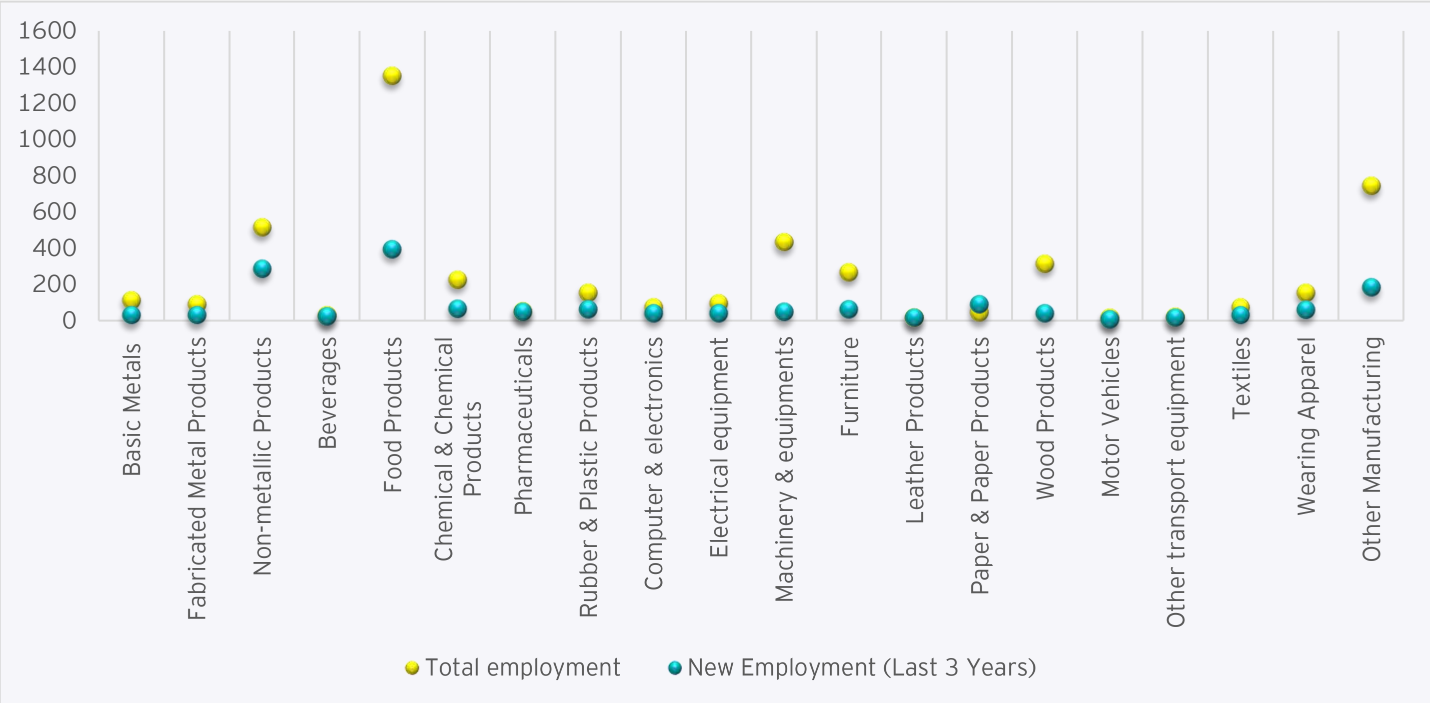


Figure 151: **[Fatehabad]** Total Employment & New employment in last 3 Financial Years (FY'17-FY'19)

Following bar chart showcases category wise per unit employment analysis for MSMEs in Fatehabad.

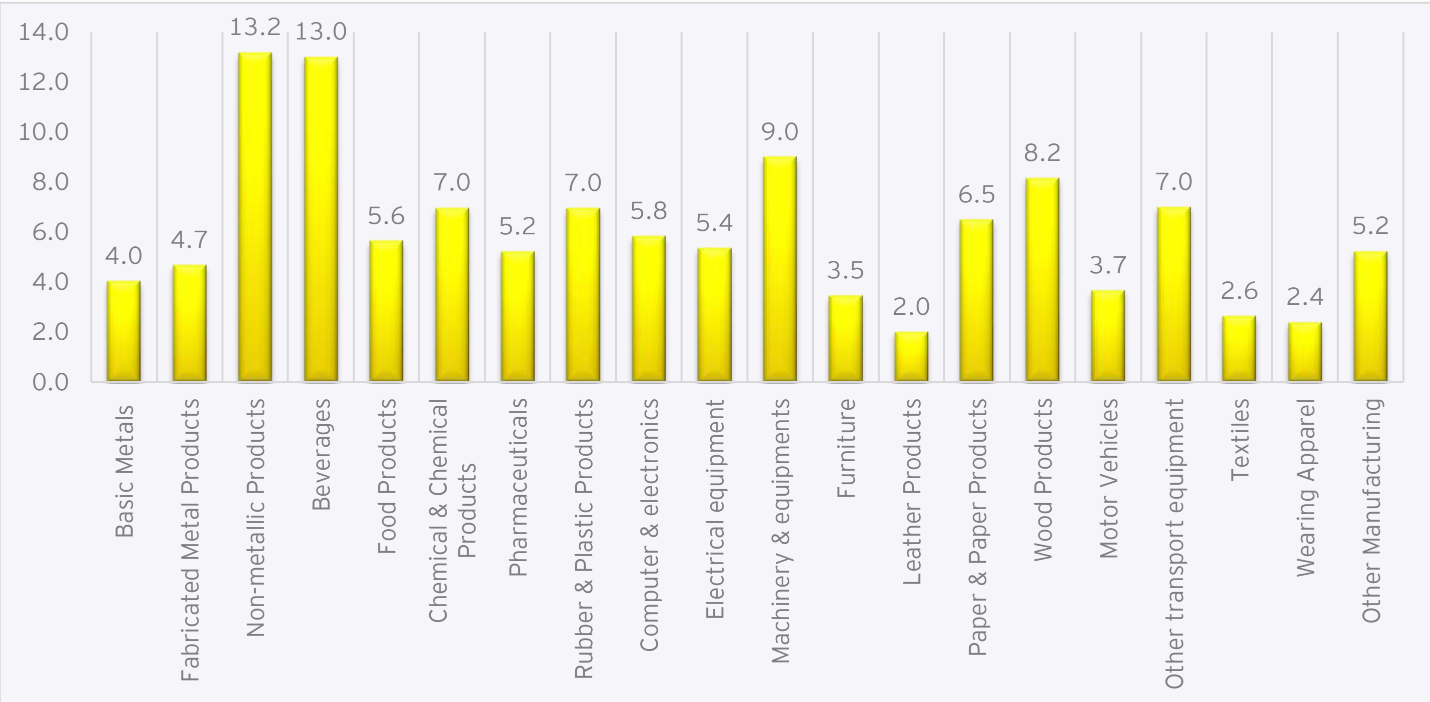


Figure 152: **[Fatehabad]** Category wise employment intensity

Following pie-charts showcase the sectors that have created maximum employment in each of the last 3 financial years.

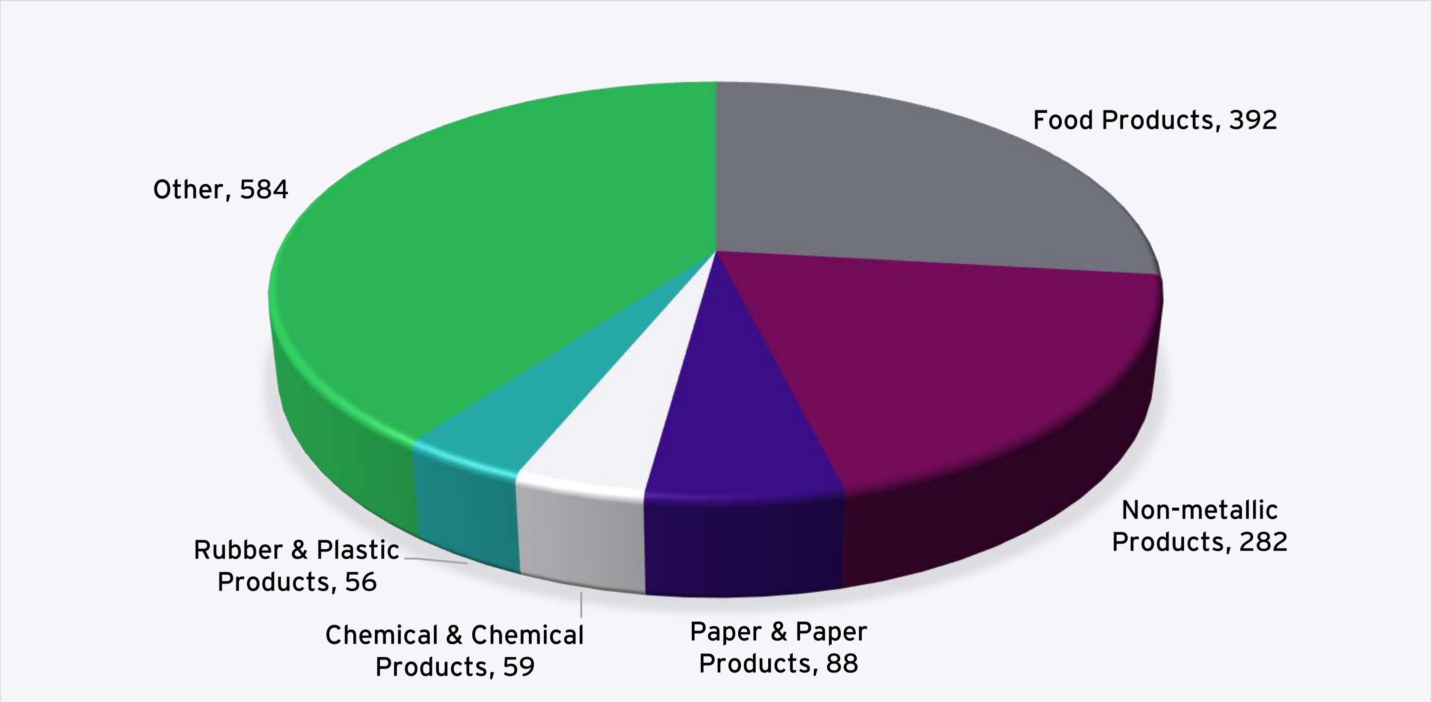


Figure 153: **[Fatehabad]** Top 5 Sectors with maximum new employment in last 3 Financial Years (FY'17-FY'19)

Key Takeaways

- Food products MSME sector provides the maximum employment (1349) followed by non-metallic products sector (514) and machinery and equipment sector (432).
- Further, food products MSME sector has also created the maximum new employment in last 3 years (392), followed by non-metallic products (282) & paper and paper products (88).
- Manufacturers of non-metallic products have maximum employment intensity with an average of 13.23 employees per unit, followed by manufacturers of beverages with 13.02 employees per unit and manufacturers of machinery & equipment at 9.0 employees per unit.
- Leather products has the least employment intensity with only 2.0 employees per unit, followed by wearing apparel at 2.4 employees per unit.
- Sectors such as motor vehicles, transport equipment and leather products, have experienced relatively low growth in new employment.

5. EXPORTS FROM THE DISTRICT

Rice is the key exportable item of Fatehabad district.

Exports worth **INR 20,985.00 Lakhs** and **INR 41,169.00 Lakhs** were reported from Fatehabad district for the year 2017-2018 and 2018-2019, respectively.

(The export figures above represent only exports related information that is available at the District Industries Centre, Fatehabad, and actual exports figure might be significantly higher).

6. NATURAL RESOURCES & RAW MATERIAL AVAILABLE

Fatehabad district is situated on the Ghaggar-Yamuna plain, and due to the district's affinity to Rajasthan, its southern and western portions witness a gradual transition to the 'Thar desert'. The district can be categorized under 3 types of topographic units, i.e. sub-recent alluvial plain, late quaternary to sub-recent sand dune areas and plain with sand dunes.

There is no perennial river flowing through the district but the river Ghaggar is a critical seasonal river and also the major drainage of the area. It runs almost parallel to the northern border of the district and drains a large volume of flood flow during the rainy season (July to September). The district has a well-established network of canal for irrigation purposes.

The soil of the district is sandy loam to loamy sands.

Fatehabad has forest area of about 40 sq. kms. and falls under the category of tropical desert. Flora is scanty and sparse. Some of the prominent tree species of the area are Jand, Rohera, Khairi, Beri, Jal or Van, Badh, Peepal, Pahari Kikar, Kachnar, Lasura, Imli, Shisham, Neem, etc.

The major Kharif crops of Fatehabad district include Paddy, (also the number one kharif crop of the district) Cotton, and Bajra, while the minor ones included sugarcane, kharif pulses and vegetables.

The major Rabi crops of Fatehabad district are wheat, gram, barley and oilseeds such as rapeseed and mustard whereas the minor ones are vegetables and fresh fruits.

7. KEY INDUSTRIAL ESTATES

There are two major industrial areas in district Fatehabad.

Table 145: Key Industrial Estates in Fatehabad

S. No.	Name of Industrial Area	Number of plots/sheds
1	HSIIDC, Tohana	58
2	Rural Industrial Estate	8

8. SERVICES SECTOR SNAPSHOT

Below table gives snapshot of the services sector in Fatehabad:

Table 146: **[Fatehabad]** Services Sector Snapshot

S. No.	Industry	Total Units	Micro	Small	Medium	Total Investment (INR Lakhs)	Total employment
1	Civil Engineering	1	1	0	0	20	8
2	Construction of building	6	2	4	0	80	46
3	Electricity, gas, steam and air conditioning supply	2	2	0	0	7	12
4	Office administrative, office support and other business support activities	77	73	4	0	274	157
5	Other professional, scientific and technical activities	69	61	8	0	363	189
6	Repair and installation of machinery and equipment	88	87	1	0	243	184
7	Specialized construction activities	14	11	3	0	137	80
8	Architecture and engineering activities; technical testing and analysis	10	10	0	0	29	22
9	Financial service activities, except insurance and pension funding	22	20	2	0	122	42
10	Food and beverage service activities	166	153	13	0	705	358
11	Mining support service activities	0	0	0	0	0	0
12	Repair of	87	86	1	0	273	186

	computers and personal and household goods						
13	Warehousing and support activities for transportation	19	13	5	1	827	102
14	Water collection, treatment and supply	1	1	0	0	4	1
15	Computer programming, consultancy and related activities	70	67	3	0	252	227
16	Human health activities	37	29	8	0	295	144
17	Information service activities	19	19	0	0	42	38
18	Real estate activities	5	5	0	0	12	14

9. CLUSTERS SCENARIO

Currently, there are no clusters in Fatehabad district.

However, given the substantial presence of Food products units and Wood product units in the district, cluster development program can be pursued within these two industries in the district.

10. INDUSTRY ASSOCIATIONS

There are three industrial associations in Fatehabad.

Table 147: Industry Associations in Fatehabad

S. No.	Name of Association	Name of President	Address	Contact
1	Tohana Chamber Commerce & Industry	Sh. Kailash Chaudhry, President	Chaudhry Rice Mills, Simbal Road, Tohana	9416044297
2	Industrial Welfare Association	Sh. Naresh Sardana	Hissar Road, Divya Cold Store, Hisar Road, Opp. Harminder Singh Petrol Pump, Fatehabad	9416136909
3	Distt. Rice Miller Association	Sh. Suresh Jindal, President	C/o Padmawati Rice Mills, Fatehabad Road, Ratia.	9416045005

11. KEY ISSUES OF THE INDUSTRIES

Some of the prominent key issues impacting industries in Fatehabad are:

- Lack of marketing awareness and knowledge. Industries are not fully competent or have the know-how to market their products nationally.
- Finance is another big hurdle. Obtaining finance for micro-units is particularly challenging due to various policy issues and complex procedures.
- Lack of proper infrastructure is another major problem disrupting the day-to-day operations of the industries. There is a lack of proper street lighting, drainages, etc.
- Non-availability of skilled labour is another major challenge.

12. POTENTIAL AREAS OF INTERVENTION

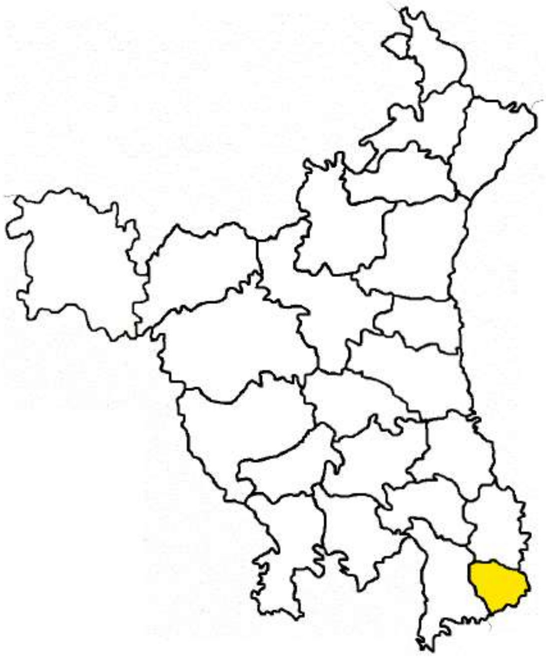
- DIC Fatehabad can organize seminars for the local Industry on Consumer & Trade promotions, Digital Marketing, Branding etc. which would help them expand their markets.
- Access to finance for micro & small units needs to be eased via effective online mechanism for ease of documentation & procedural clearances required.
- HSIIDC can formulate an online grievance redressal mechanism to ensure fast response to all maintenance related issues such as street lights, drainage etc.
- DIC Fatehabad may facilitate closer collaboration between technical institutes such as Polytechnics/ITIs and local industry.

13. POTENTIAL AREAS OF INVESTMENT

- Fatehabad has a significant furniture industry with around 77 MSMEs and 13 new units opening in last 3 years, which can be leveraged for further investments in downstream value chain products such as branded furniture and retailing.
- Food products sector with around 239 units in the district, also offers significant investment opportunity in product diversification such as long shelf life foods & ready-to-eat food products.

18. Palwal

District Profile



EXECUTIVE SUMMARY

District Profile
MSME Scenario

MSME Scenario

18

Palwal

Famous for....
"Growing auto-components industry"

1 MSMEs in Palwal

Total number of MSME units	681
New MSME units (last 3 years)	318

Food products
Motor Vehicles
Furniture
Textiles
Paper & paper products

Top 5 sectors – Maximum number of MSMEs

2 Investment Scenario in Palwal

Total Investment (INR Lakhs)	47,208
New Investment (last 3 years; INR Lakhs)	9,841

Paper & paper products
Motor Vehicles
Electrical Equipment
Food Products
Rubber & Plastic products

Top 5 sectors – Maximum investment by MSMEs

3 Employment Scenario in Palwal

Total Employment	11,542
New Employment (last 3 years)	2,892

Food products
Motor Vehicles
Textiles
Rubber & Plastics Products
Furniture

Top 5 sectors – Most employment generated

4 Potential for MSMEs

- Motor vehicles sector has significant potential in up-stream value chain manufacturing facilities such as different types of tertiary supplies for automotive parts & components
- Rapidly growing textile sector in the district offers attractive investment potential especially in facilities such as advanced designing & printing etc.

5 Others

Total Exports (FY 18-19; INR Lakhs)	1,42,655
Number of Large & Mega units	31
Existing Clusters	No clusters currently

1. INTRODUCTION

Palwal is the 21st district of Haryana, and was created on 15 August, 2008. It was carved out of two other prominent districts i.e. Faridabad and Nuh. Palwal is an important historical site, and was supposedly part of the Pandava kingdom of Indraprastha under the name "Apelava".

Palwal has several hospitals, schools, engineering colleges and places of interest, such as an old fort from Mughal period, Panchwati Temple, Jama Masjid dating back to 1210 AD and more.

1.1 Geography

Palwal falls in the southern part of Haryana and is situated 60 kms away from Delhi on NH-2, Delhi-Mathura highway. It is a part of the National Capital Region and its geographical boundaries touch Nuh, Gurugram, Faridabad, Delhi and Aligarh. The iconic six-lane Western Peripheral Expressway or Kundli-Manesar-Palwal (KMP) Expressway runs through the city connecting the five districts of Haryana, Sonipat, Jhajjar, Gurugram, Mewat and Palwal. Yamuna, the perennial river, also flows through the district.

Palwal has similar climatic conditions as its neighbor, Delhi. Latter half of April, May, June and July are the summer months with average temperature of 36 degree Celsius. During the rainy months, the average temperature is 22 degree Celsius and the rainfall peaks to 184 mm. The winter months see an average of 15-degree Celsius.

1.2 Demographic Profile

As per the 2011 census, Palwal's total population is 1,042,708 persons across an area of 1,359 sq. kms. and is ranked 328th among 640 districts on population. Palwal district has a population density of 767 persons per sq. km. The population growth rate for Palwal in the last decade (2001-2011) was 25.76%. Palwal has a moderate literacy rate of 69.32%. The district's sex ratio, though significantly lower than the national average of 940, i.e. 880 females per thousand males, is at par with the state average of 877.

1.3 Administrative Set-up

Palwal has a total of 282 villages with 237 gram panchayats. Further, it has one municipal council with two municipal committees, three sub-divisions, six development blocks and three tehsils.

The Deputy Commissioner is responsible for the overall general administration of the district. Besides being the Deputy Commissioner, he also functions as the District Magistrate and the Collector.

The administrative control of Deputy Commissioner lies with Commissioner, Faridabad Division of Faridabad.

The following table shows categorization of blocks as per the status of industrial development.

Table 148: **[Palwal]** Categorization of Blocks

Block A	Block B	Block C	Block D
Palwal	Hodel	Hassanpur	
Prithla		Hathin	
		Badoli	

2. SECTOR WISE MSME LANDSCAPE

Following table shows the total number of MSME units in each sector, in Palwal, along with the bifurcation of number of micro, small and medium enterprises.

The table also shows number of new units that started their commercial production in the last three financial years.

Table 149: **[Palwal]** No. of MSME Units in each Sector

S. No.	Industry	Total Units	Micro	Small	Medium	FY'17	FY'18	FY'19	New Units (Last 3 Years)
Food, Beverages & Tobacco									
1	Food products	127	93	34	0	9	33	19	61
Textiles									
2	Textiles	92	81	11	0	12	23	20	55
3	Wearing Apparel	10	10	0	0	1	5	3	9
Automotive & Auto-Components									
4	Motor vehicles, Trailers and Semi-trailers	152	71	68	13	16	25	7	48
Pharma, Petro-Chemicals, Rubber products									
5	Chemicals and Chemical Products	26	19	5	2	1	2	7	10
6	Rubber and Plastics Products	26	15	10	1	1	1	2	4
7	Coke and Refined Petroleum Products	5	1	4	0	0	1	0	1
Leather, Wood & Paper									
8	Furniture	64	60	4	0	8	11	9	28
9	Leather and Related Products	1	1	0	0	0	0	0	0
10	Paper and Paper Products	29	18	9	2	13	4	4	21

Electrical, Electronics & Machinery									
11	Electrical Equipment	25	17	7	1	6	8	2	16
12	Computer, Electronic and Optical Products	5	3	2	0	1	1	0	2
Other Manufacturing									
13	Repair and Installation of Machinery and Equipment	10	10	0	0	0	5	0	5
14	Other Manufacturing	109	87	21	0	11	32	15	58

Following scatter diagram shows the comparison between total units in each sector vis-a-vis new units opened in the last 3 financial years.

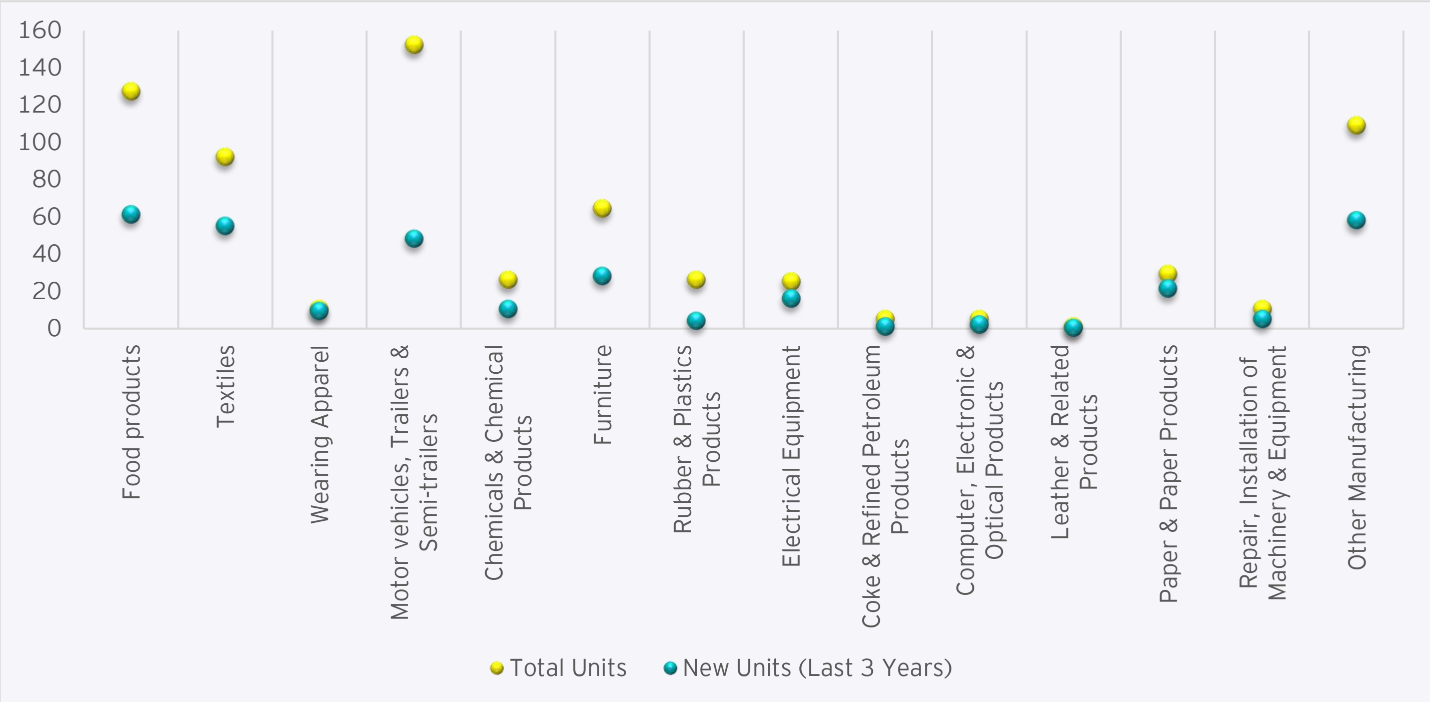


Figure 154: **[Palwal]** Total Units & New Units in each Sector

2.1 Top 10 Sectors: Based on Number of Units

Following table shows top ten sectors in Palwal, based upon the total number of MSME units in the district.

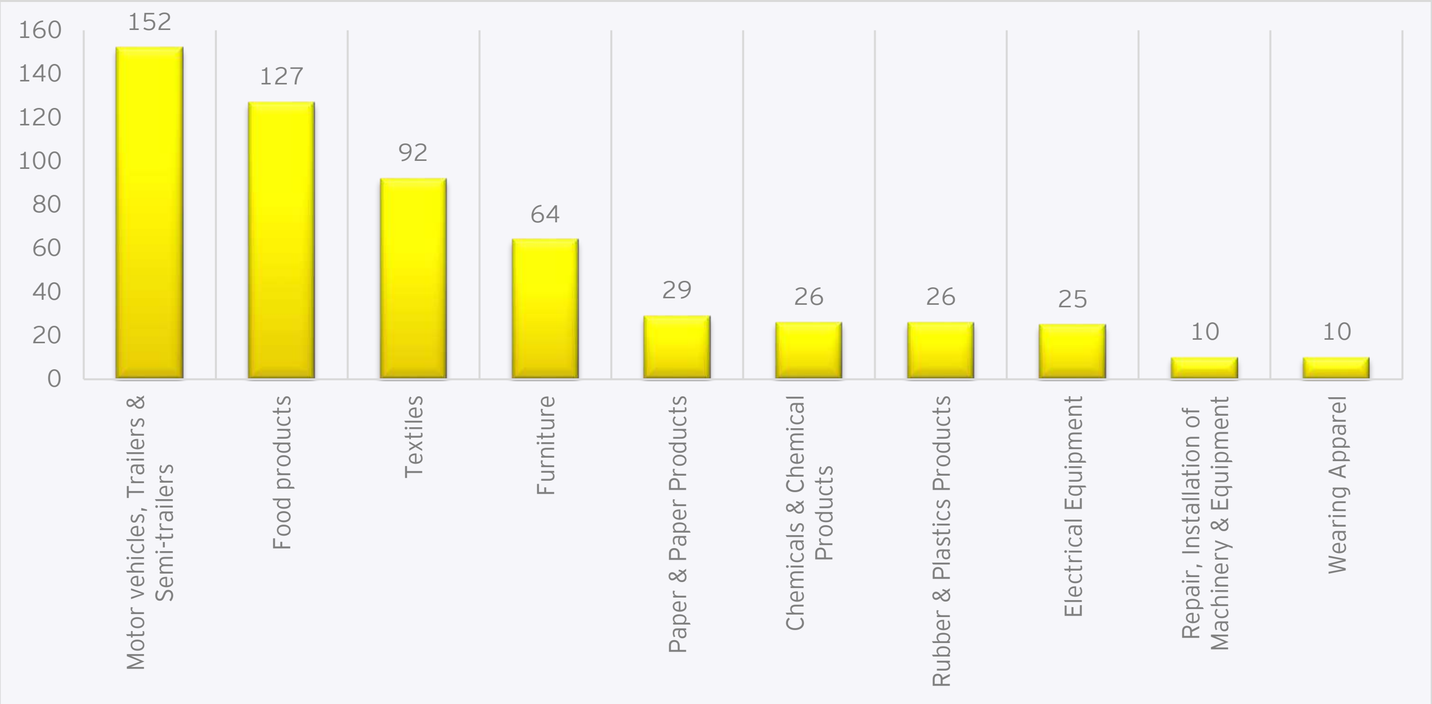


Figure 155: **[Palwal]** Top 10 sectors - Total No. of MSME Units

2.2 Top 10 Sectors: Based on New Units in Last 3 Years

Following table shows the top ten sectors in Palwal, based upon number of new MSME units set-up in the last three years.

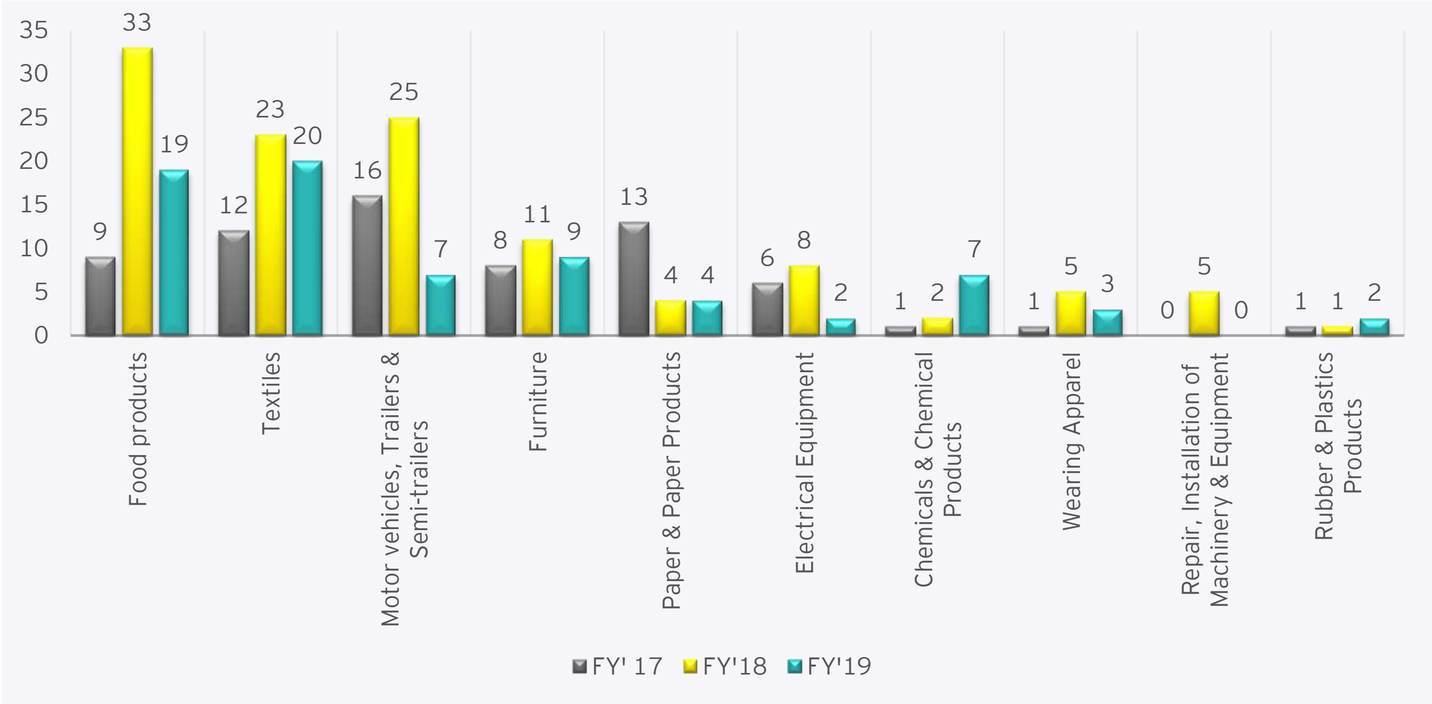


Figure 156: **[Palwal]** Top 10 Sectors - New Units in Last 3 Years

Key Takeaways

- Maximum number of MSME units in Palwal are involved in the 'motor vehicles, trailers and semi-trailers' sector, followed by food products.
- In the last three years as well, food products sector has seen maximum number of new MSME units opened (61), followed by textiles (55) and 'motor vehicles, trailers and semi-trailers' (48).
- In terms of the percentage growth, apparels and paper & paper products have experienced impressive recent growth with 90% and 72% of the total units having opened up in the last 3 years respectively, followed by electrical equipment.

3. SECTOR WISE INVESTMENT SCENARIO

Punjab National Bank is the convener bank of State Level Bankers' Committee (SLBC) in Haryana. While Oriental Bank of Commerce is the district lead bank of Palwal.

Following table shows the total investment by MSMEs in each sector in Palwal, along with new investment in the last three financial years.

Table 150: **[Palwal]** Total Investment by MSMEs

S. No.	Industry	Investment (INR Lakhs)				
		Total Investment	FY'17	FY'18	FY'19	New Investment (Last 3 Years)
Food, Beverages & Tobacco						
1	Food products	3669	103	643	243	989
Textiles & Apparel						
2	Textiles	1863	615	84	56	755
3	Wearing Apparels	31	1	11	12	24
Automotive & Auto-Components						
4	Motor vehicles, Trailers and Semi-trailers	23268	1521	1669	92	3282
Pharma, Petro-Chemicals, Rubber products						
5	Chemicals and Chemical Products	2208	10	35	53	98
6	Rubber and Plastics Products	2339	15	5	185	205
7	Coke and Refined Petroleum Products	889	0	15	0	15

Leather, Wood & paper						
8	Furniture	911	48	105	29	182
9	Leather and Related Products	5	0	0	0	0
10	Paper and Paper Products	4120	641	40	428	1109
Electrical, Electronics & Machinery						
11	Electrical Equipment	2645	432	534	2	968
12	Computer, Electronic and Optical Products	441	20	15	0	35
Other Manufacturing						
13	Repair, Installation of Machinery and Equipment	90	0	37	0	37
14	Other Manufacturing	4729	462	1274	406	2142

Following scatter diagram shows a comparison of total MSME investment and new investment in the last 3 financial years, across different sectors of Palwal.

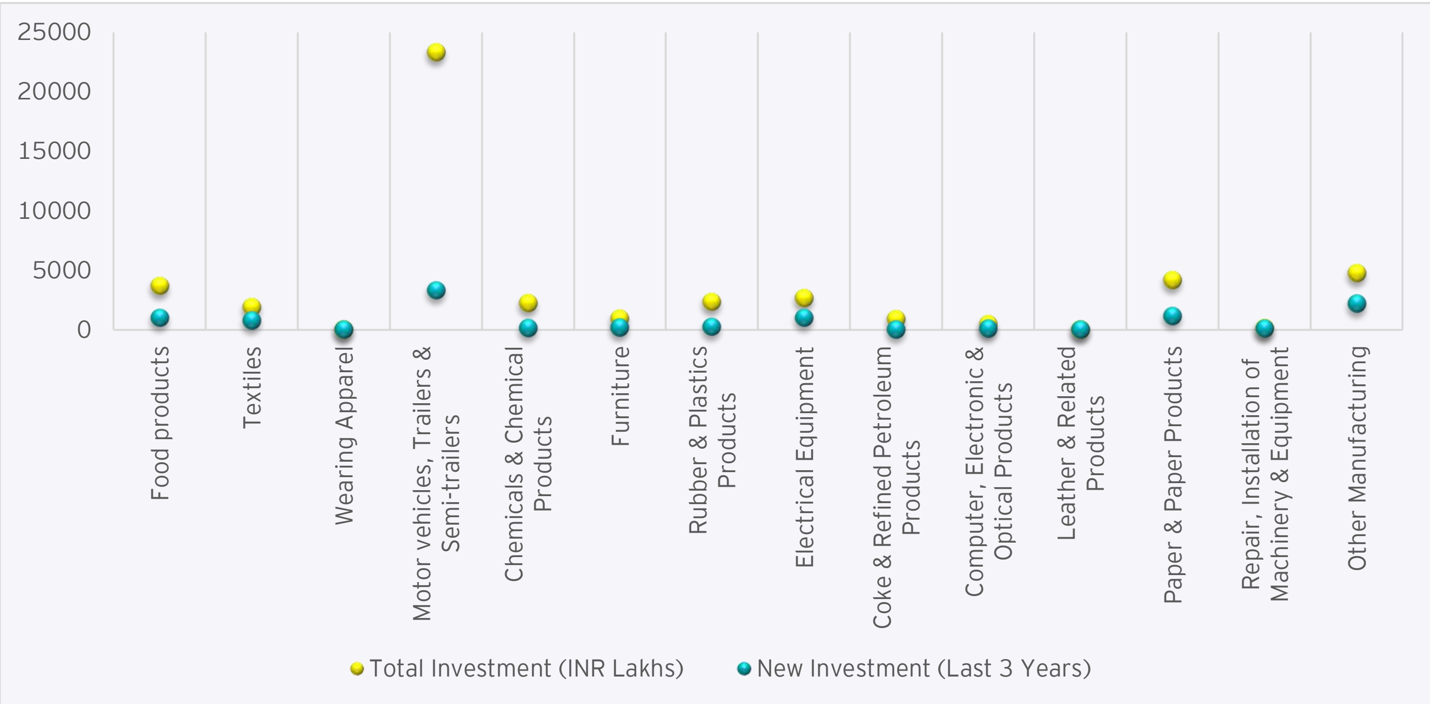


Figure 157: **[Palwal]** Total Investment & New Investment in Last 3 Financial Years (FY'17-FY'19)

Following pie-chart showcases the sectors that have attracted maximum investments in the last 3 financial years (figures are in Lakhs).

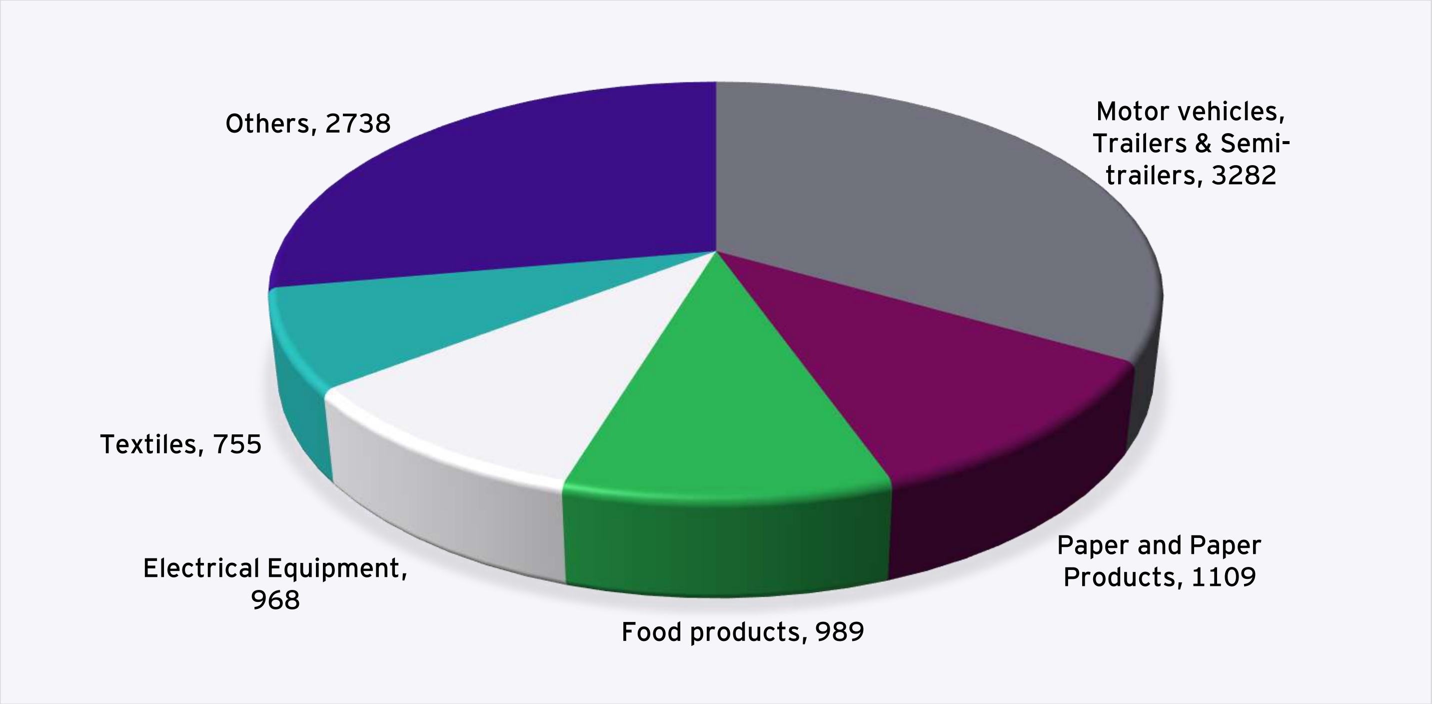


Figure 158: **[Palwal]** Top 5 Sectors with maximum investment in last 3 Financial Years (FY'17-FY'19)

Following diagram shows a comparison of compound annual growth rate of various sectors for last three financial years.

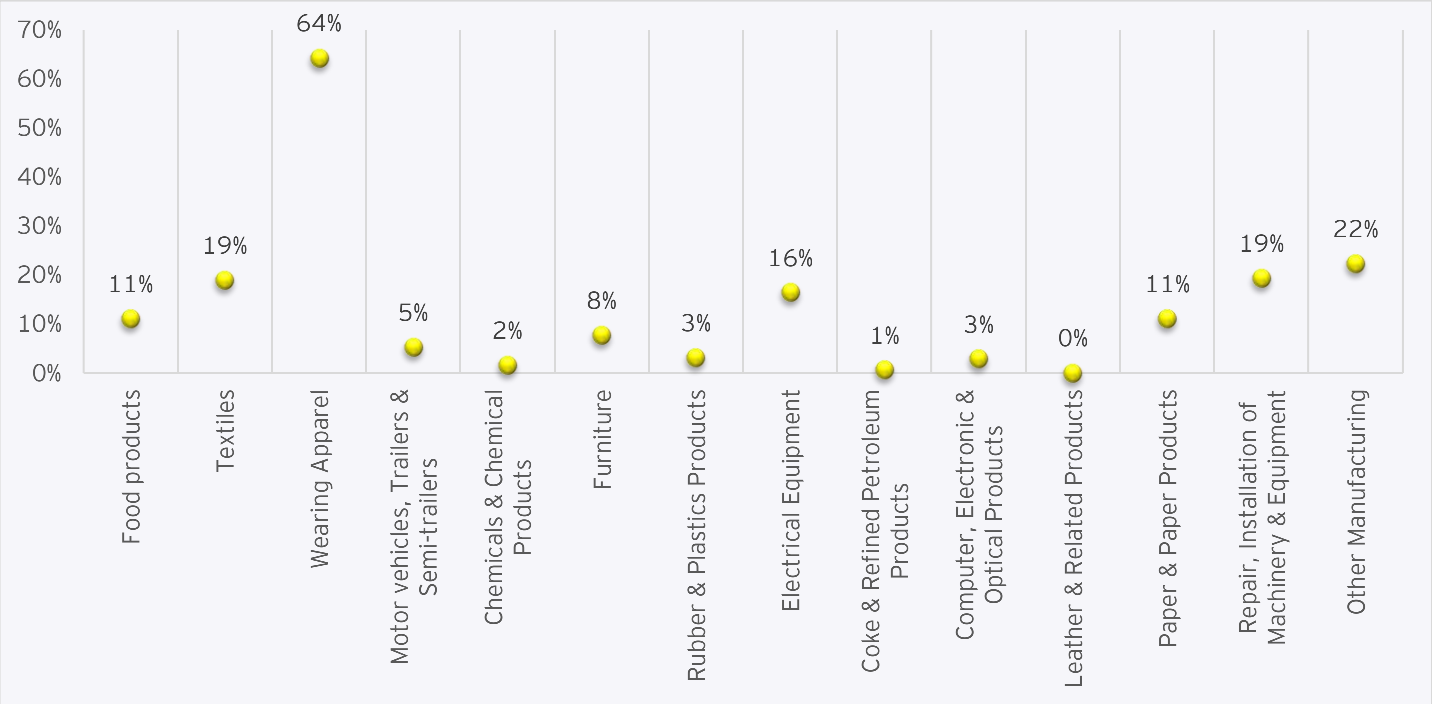


Figure 159: **[Palwal]** CAGR for Last 3 Financial Years (FY'17-FY'19)

Key Takeaways

- Highest amount of investment by MSMEs in Palwal has been in 'motor vehicles, trailers & semi-trailers' sector (INR 232.68 Cr.), followed by paper and paper products sector (INR 41.20 Cr.).
- Besides being the sectors with highest total investment, 'motor vehicles, trailers & semi-trailers' sector and paper and paper products sector also attracted maximum investment in the last three financial years (INR 32.82 Cr. and INR 11.09 Cr. respectively).
- Sectors with high CAGR in MSME investments in the last 3 FYs are: wearing apparel (64%), repair and installation of machinery and equipment (19%), textiles (19%), electrical equipment (16%), food products (11%) and paper and paper products (11%).

4. SECTOR WISE EMPLOYMENT SCENARIO

Below table showcases the total employment created by MSMEs in each of the sectors, along with new employment created in the last three financial years.

Table 151: **[Palwal]** Total Employment in each Sector

S. No.	Industry	Total employment	FY'17	FY'18	FY'19	New Employment (Last 3 Years)
Food, Beverages & Tobacco						
1	Food products	1023	42	225	98	365
Textiles & Apparel						
2	Textiles	705	75	113	85	273
3	Wearing Apparel	38	1	22	10	33
Automotive & Auto-Components						
4	Motor vehicles, Trailers and Semi-trailers	5095	423	388	45	856
Pharma, Petro-Chemicals, Rubber products						
5	Chemicals and Chemical Products	495	8	28	39	75
6	Rubber and Plastics Products	821	8	5	13	26
7	Coke and Refined Petroleum Products	105	0	4	0	4
Leather, Wood & Paper						
8	Furniture	614	35	55	30	120
9	Leather and Related Products	12	0	0	0	0
10	Paper and Paper Products	613	135	21	15	171
Electrical, Electronics & Machinery						

11	Electrical Equipment	523	52	95	10	157
12	Computer, Electronic and Optical Products	104	8	3	0	11
Other Manufacturing						
13	Repair and Installation of Machinery and Equipment	39	0	18	0	18
14	Other Manufacturing	1355	321	367	95	783

Following scatter diagram shows a comparison of total employment across different MSME sectors and new employment generated in the last 3 financial years.

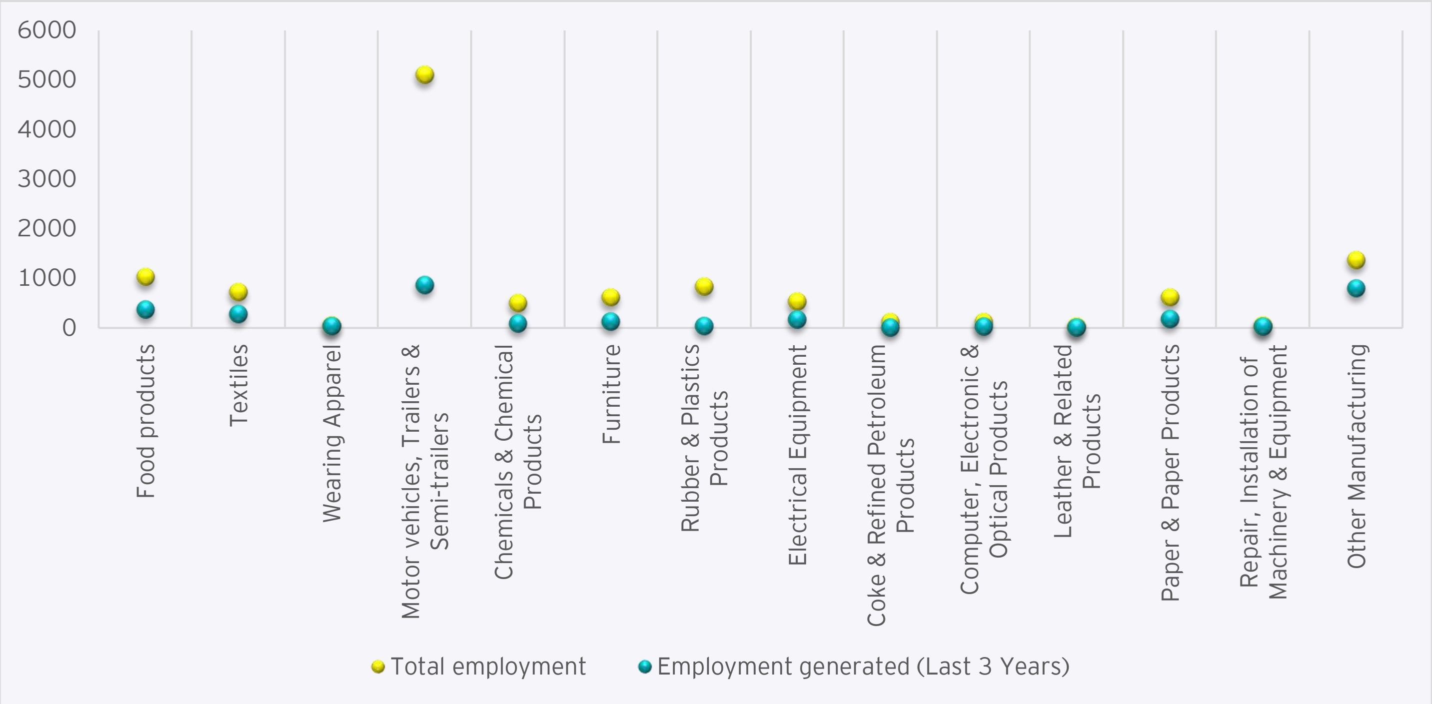


Figure 160: **[Palwal]** Total Employment & New employment in last 3 Financial Years (FY'17-FY'19)

Following bar chart showcases category wise per unit employment analysis for MSMEs in Palwal.

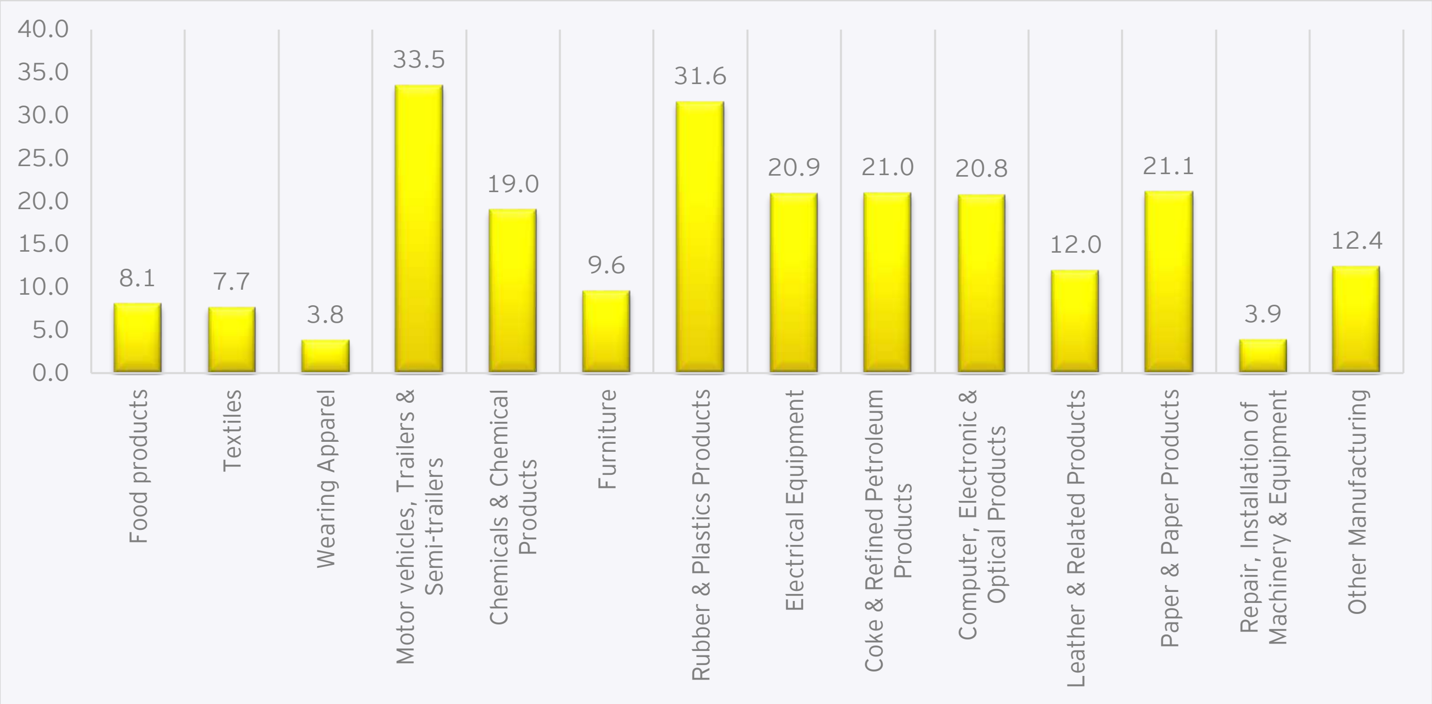


Figure 161: **[Palwal]** Category wise employment intensity

Following pie-charts showcase the sectors that have created maximum employment in each of the last 3 financial years.

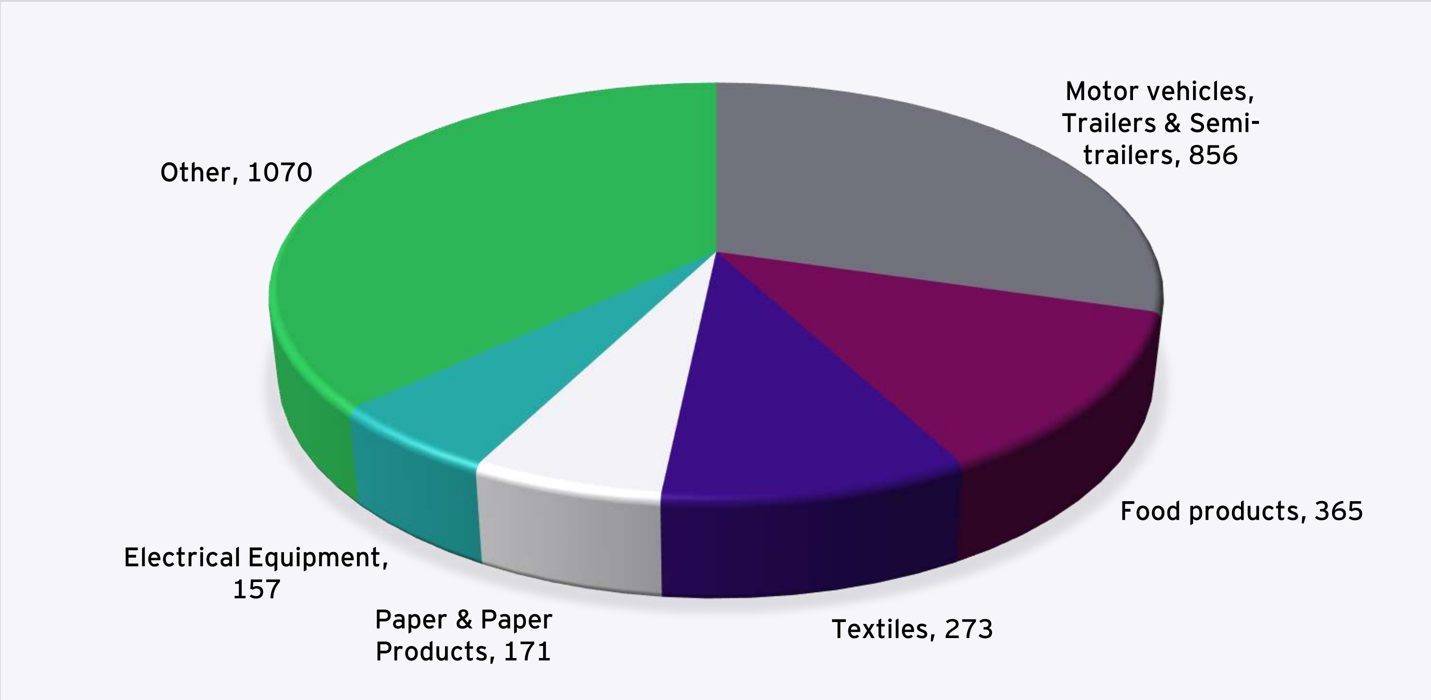


Figure 162: **[Palwal]** Top 5 Sectors with maximum new employment in last 3 Financial Years (FY'17-FY'19)

Key Takeaways

- 'Motor vehicles, trailers & semi-trailers' MSME sector provides the maximum employment (5095) followed by food products sector (1023) and rubber & plastic products sector (821).

- Further, 'Motor vehicles, trailers & semi-trailers' MSME sector has created the maximum new employment in last 3 years (856), followed by food products (365) & textiles (273).

- Manufacturers of 'motor vehicles, trailers & semi-trailers' have maximum employment intensity with an average of 33.5 employees per unit, followed by manufacturers of rubber & plastic products with 31.6 employees per unit and manufacturers of paper & paper products at 21.1 employees per unit.

- Wearing apparels has the least employment intensity with only 3.8 employees per unit, followed by repair, installation & machinery equipment at 3.9 employees per unit.

- Sectors such as leather & related products, coke & refined petroleum products and computer, electronic & optical products, have experienced relatively low growth in new employment.

5. EXPORTS FROM THE DISTRICT

Key exports products from Palwal include 'motor vehicles, trailers & semi-trailers', chemicals & chemical products and furniture.

Following table shows some of the exports from Palwal for last 3 Financial Years.

(The export data in the table shows only exports related information that is available at the District Industries Centre, Palwal, and actual exports figure might be significantly higher.)

Table 152: Exports from Palwal

S. No.	Industry	Exports (INR Lakhs)		
		FY'17	FY'18	FY'19
1	Food products	2922.84	3100	2436.97
2	Textiles	700	950	1080
3	Motor vehicles, Trailers & Semi-trailers	72829.62	57390	80580.8
4	Chemicals & Chemical Products	7900	8300	8844.27
5	Furniture	5439.02	5767.73	8587.12
6	Rubber & Plastics Products	950	1235.05	1320
7	Electrical Equipment	4889.06	5121	5102.45
8	Other Manufacturing	3	0	0

6. NATURAL RESOURCES & RAW MATERIAL AVAILABLE

Palwal district has mostly mountainous physiography. Alluvium deposits are found in the region, including Banger (older) and Khadar (newer) alluvial and kankar.

There is one perennial river in Palwal, the Yamuna river, that also forms the eastern border of the district.

In terms of soil, loamy sand is found in Palwal district due to Yamuna flood plains, sandy loam is seen mostly in plains, while alluvial plains have both sandy loam to clay loam. In low lying plains and depressions different kind of soil is found, such as sandy loam to loam on surface, clay loam/silty clay on sub-surface.

The Palwal district lies under low to medium fertility zone.

The major kharif crops of Palwal are paddy, bajra, jowar, kharif pulses, sugarcane and kharif vegetables.

The major rabi crops of Palwal include wheat, barley, rabi oilseeds and vegetables.

7. KEY INDUSTRIAL ESTATES

There are two major industrial areas in district Palwal.

Table 153: Key Industrial Estates in Palwal

S. No.	Name of Industrial Area	Number of Plots/Sheds
1	Prithla Industrial Area	8
2	Hathin Industrial Area	111

8. MAJOR LARGE-SCALE UNITS

Apart from MSMEs, Palwal also has around 31 Large & Mega enterprises operational in various sectors. Below table showcases number of Large & Mega enterprises in each sector along with their names.

Table 154: **[Palwal]** Large & Mega Units in each Sector

S. No.	Industry	Number	Names of Large & Mega Units
1	Food products	2	• Kwality Ltd. • Palwal Co-Operative Sugar Mill Ltd.
2	Textiles	1	• Gupta Exim (India) Pvt. Ltd.
3	Motor vehicles, Trailers & Semi-trailers	21	• Omaxe Auto Ltd. • OMP India Pvt. Ltd. • Ottoman Industries (P) Ltd. • Veegee Industrial Enterprises Pvt. Ltd. • Deepak Industries Ltd. • Micro Precision Products Ltd. • Sterling Tools Ltd. • Dee Development Engineers Ltd. • Pranav Vikas (India) Ltd. • Flovel Energy Private Ltd. • Knorr- Brremse India Pvt. Ltd. • Andritz Hydro Pvt. Ltd. • Action Construction Equipment Ltd. • Century Metal Recycling Pvt. Ltd. • Pooja Forge Ltd. • Siac Skh Industries Pvt. Ltd. • Bhunit Engg. Co. Pvt. Ltd. • Balmer & Lawrie Co. Ltd. • Sata Vikas India Pvt. Ltd. • Shivani Lockes Pvt. Ltd. • Venus Industrial Corporation Pvt. Ltd.

4	Chemicals & Chemical Products	2	• Ashoka Distillers & Chemicals Pvt. Ltd. • HPL Additives Ltd.
6	Rubber & Plastics Products	1	• Tokai Imperial Rubber India Pvt. Ltd.
7	Electrical Equipment	3	• Trinity Touch Pvt. Ltd. • Auto Ignition Pvt. Ltd. • Phoenix Contacts (India) Pvt. Ltd.
13	Other Manufacturing	1	• Mahindra Defence Land System Ltd.

9. SERVICES SECTOR SNAPSHOT

Below table gives snapshot of the services sector in Palwal:

Table 155: **[Palwal]** Services Sector Snapshot

S. No.	Industry	Total Units	Micro	Small	Medium	Total Investment (INR Lakhs)	Total employment
1	Accommodation	2	1	1	0	17	6
2	Activities of Head offices; Management Consultancy Activities	4	4	0	0	20	17
3	Publishing Activities	9	8	1	0	51	34
4	Services to Buildings and Landscape Activities	40	24	15	1	984	366
5	Repair of Computers and Personal and Household Goods	87	82	5	0	318	378
6	Architecture and Engineering Activities; Technical Testing and Analysis	9	6	2	1	294	63
7	Creative, Arts and Entertainment Activities	9	9	0	0	35	30
8	Education	37	31	6	0	367	281
9	Employment Activities	23	22	1	0	77	151
10	Financial Service Activities, except Insurance and Pension Funding	25	23	2	0	82	72
11	Food and Beverage Service Activities	82	70	11	1	815	272
12	Human Health Activities	28	24	4	0	240	100

13	Land Transport and Transport via Pipelines	65	27	38	0	1043	264
14	Information Service Activities	17	13	3	1	331	69
15	Office Administrative, Office Support and Other Business Support Activities	48	43	5	0	242	251
16	Motion picture, Video and Television Programme Production, Sound Recording and Music Publishing Activities	5	4	1	0	18	20
17	Other Personal Service Activities	227	211	15	1	1426	661
18	Other Professional, Scientific and Technical Activities	40	31	9	0	327	621
19	Postal and Courier Activities	5	3	2	0	36	27
20	Real Estate Activities	18	13	5	0	172	68
21	Rental and Leasing Activities	15	13	2	0	162	83
22	Wholesale and Retail Trade and Repair of Motor Vehicles and Motorcycles	30	26	4	0	201	115
23	Retail Trade, Except of Motor Vehicles and Motorcycles	140	137	3	0	338	188
24	Warehousing and Support Activities for Transportation	17	8	8	1	683	69
25	Travel agency, Tour Operator and other Reservation Service Activities	14	10	4	0	109	52
26	Telecommunications	19	15	4	0	202	58
27	Sports Activities and Amusement and Recreation Activities	5	2	3	0	70	15
28	Security and Investigation Activities	5	3	2	0	85	351
29	Other Services	150	129	15	1	1515	549

10. CLUSTERS SCENARIO

Presently, there is only one cluster in Palwal.

Table 156: Mini Clusters in Palwal

S. No.	Mini Clusters	Location	Cluster Identification	DSR Preparation	DPR Preparation	Implementation
1	Auto Components Cluster	Palwal	√	√	√	√

There is a significant presence of auto, food products and textile industries in the district. Also, some of the major exportable items from the district are hydraulic turbines, rear axle shafts, elevators and loaders, cranes, hoist, azo initiators, dairy equipments, webbing equipments, piping system, nut bolts, C.I. castings, milk powder, ghee etc. There is an opportunity to mobilize clusters within these industries from the district.

11. INDUSTRY ASSOCIATIONS

There are two industrial associations in Palwal.

Table 157: Industry Associations in Palwal

S. No.	Name of Association	Name of President	Address	Contact/ Email
1	Palwal Industrial Association	Dr. S C Kansal, President	PIA House, G. T. Road, V&PO Prithla, Teh. & Distt. Palwal	9811156897 pia.palwal@gmail.com
2	Hathin Industrial Association	Mr. Subhash Sharma, President	C/o AVS Breaklining (P) Ltd. Plot No. 72-73, Indl. Area, Hathin Distt. Palwal	9811046248 thermalpapers@hotmal.com

12. KEY ISSUES OF THE INDUSTRIES

Some of the recent issues being faced by Industries in Palwal are:

- Decontrol area:

- Most of the industries were set-up in decontrolled area where no CLU was required. Now the area has become controlled.
- All the units set-up during decontrolled period also have to be regularized with CLU.

- Fire license

- Units are required to pay INR 15 Lacs to the Fire department for the installation of system.
- The amount is very steep, and does not take into account the size of the unit.

- Better infrastructure

- Better infrastructure is required for the industries located near Prithla, i.e. roads, adequate power, security, drinking water, sewerage, local transportation facilities, workers colonies, banking and postal facilities.

- Toll plaza

- There is an upcoming Toll plaza just at the entrance of Palwal industrial land. Industrialists will be using this road only for a few kilometers but are required to pay the toll on daily basis, which is an added expense.

- Land

- Industrialists require a small plot to build Palwal Industries Association office and a training center.
- The intent is to construct the building from own fund, however, support is required from the government to obtain a small piece of land for the said purpose.

- Disagreement with Forest officials

- Industrialists bought land from farmers, who at some point may have cut trees. However, the industrialists are now being held accountable for cutting the trees.

13. POTENTIAL AREAS OF INTERVENTION

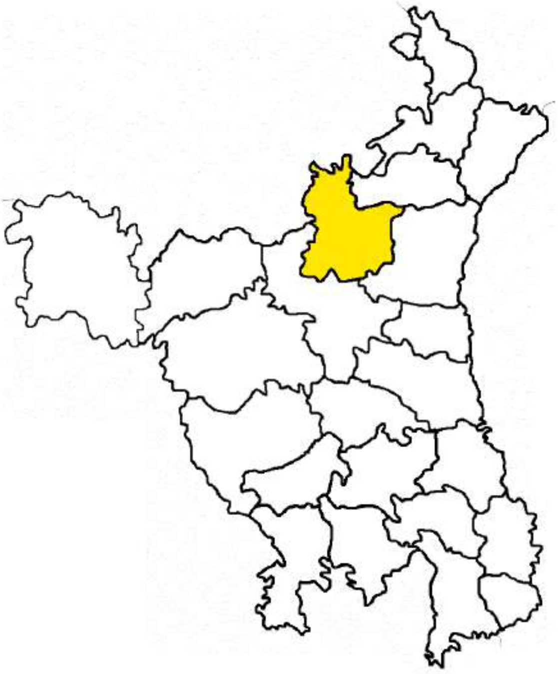
- State govt. may frame a policy on regularization of industries, resettlement of polluting industries.
- Fire license fee needs to be calibrated in accordance to the size of the unit.
- Industries department can coordinate with HSIIDC & other district departments to develop the Industrial area near Prithla.

14. POTENTIAL AREAS OF INVESTMENT

- 'Motor-Vehicles, Trailer & Semi-trailers' is the key sector in Palwal with around 152 units currently operational. Sector offers significant potential in up-stream value chain manufacturing facilities such as different types of automotive parts & components which can act as raw material suppliers to units in the district.
- Textile is another key sector in the district with 92 units. The sector is rapidly growing with 55 of these units starting production in last 3 years. District offers attractive investment potential in textile sector especially in facilities such as advanced designing & printing etc.

19. Kaithal

District Profile



EXECUTIVE SUMMARY

District Profile

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Kaithal

Famous for....
"Rice Production"

1 MSMEs in Kaithal

Total number of MSME units *529*

New MSME units (last 3 years) *107*

Furniture
Food Products
Electrical Equipment
Machinery & Equipment
Basic Metals

Top 5 sectors – Maximum number of MSMEs

2 Investment Scenario in Kaithal

Total Investment (INR Lakhs) *27,816*

New Investment (last 3 years; INR Lakhs) *3,683*

Machinery & Equipment
Food Products
Fabricated Metal
Basic Metals
Electrical Equipment

Top 5 sectors – Maximum investment by MSMEs

3 Employment Scenario in Kaithal

Total Employment *4,294*

New Employment (last 3 years) *575*

Machinery & Equipment
Food Products
Basic Metals
Furniture
Electrical Equipment

Top 5 sectors – Most employment generated

4 Potential for MSMEs

Food products sector offers significant scope for investment towards downstream value chain food products and investment in marketing such as e-commerce, physical store retailing, and sales enablement in newer markets

Furniture sector provides attractive investment opportunity in advanced technology facilities such as laser cutting & engraving etc. which can help the local industry in product diversification & improving product quality

5 Others

Total Exports (FY 18-19; INR Lakhs) *73,515*

Number of Large & Mega units *0*

Existing Clusters *2 Mini Clusters*

1. INTRODUCTION

Kaithal district was formed on 16th October 1989, carved out of Kurukshetra and Jind districts. It is believed that the district was established by Lord Yudhistra during Mahabharta era. The district holds great historical value and possesses rich cultural and historical heritage.

1.1 Geography

Kaithal is situated in the north-west part of Haryana. Its north-west boundary touches the State of Punjab, while it has district Kurukshetra district in north, district Karnal in east and district Jind in south.

The climate in Kaithal district is mostly sub-tropical continental with extreme weather, great variation in temperature and unreliable rainfall. The air is generally dry. June to September receives maximum annual rainfall, with September being the rainiest month. Dust storms may also be seen during April to June.

1.2 Demographic Profile

As per the 2011 census, Kaithal's total population is 1,074,304 persons across a geographical area of 2,317 sq. kms. Kaithal district has a population density of 464 persons per sq. km. The population growth rate for Kaithal in the last decade (2001-2011) was 13.55%. Kaithal has an average literacy rate of 69.15%, which is still an improvement from 59% during 2001 Census. The increase in literacy rate is especially evident amongst the female population of the district, from 47.3% during 2001 census to 59.2% during 2011 census. The district's sex ratio is lower than the national average of 940 and slightly more than the state average of 879, i.e. 881 females per thousand males. However, it has marginally improved from 853 in 2001.

1.3 Administrative Set-up

The district falls under Ambala division and is headquartered in Kaithal town. It constitutes of three sub-divisions (Kaithal, Guhla and Kalayat), four tehsils (Kaithal, Guhla, Pundri and Kalayat), three sub-tehsils (Siwan, Dhand and Rajound), and seven developmental blocks (Kaithal, Pundri, Kalayat, Rajound, Siwan, Guhla and Dhand.

The Deputy Commissioner is responsible for the overall district administration. He also performs the functions of District Magistrate and the Collector.

The following table shows categorization of blocks as per the status of industrial development.

Table 158: **[Kaithal]** Categorization of Blocks

Block A	Block B	Block C	Block D
		Guhla at Cheeka	Kalayat
		Kaithal	Rajound
		Pundri	Siwan
		Dhand	

2. SECTOR WISE MSME LANDSCAPE

Following table shows the total number of MSME units in each sector, in Kaithal along with the bifurcation of number of micro, small and medium enterprises.

The table also shows number of new units that started their commercial production in the last three financial years.

Table 159: **[Kaithal]** No. of MSME Units in each Sector

S. No.	Industry	Total Units	Micro	Small	Medium	FY' 17	FY'18	FY'19	New Units (Last 3 Years)
Metals & Mineral Products									
1	Basic metals	24	20	4		6	3	1	10
2	Fabricated metal products, except machinery & equipment	17	14	3		0	0	0	0
Electrical, Electronics & Machinery									
3	Electrical equipment	27	27	0		0	0	0	0
4	Machinery & equipment	37	32	5		0	0	0	0
Food, Beverages & Tobacco									
5	Food products	247	125	115	7	9	10	3	22
Leather, Wood & paper									
6	Furniture	65	65			9	15	8	32
Other manufacturing									
7	Other manufacturing	112	95	17		22	12	9	43

Following scatter diagram shows the comparison between total units in each sector vis-a-vis new units opened in the last 3 financial years.

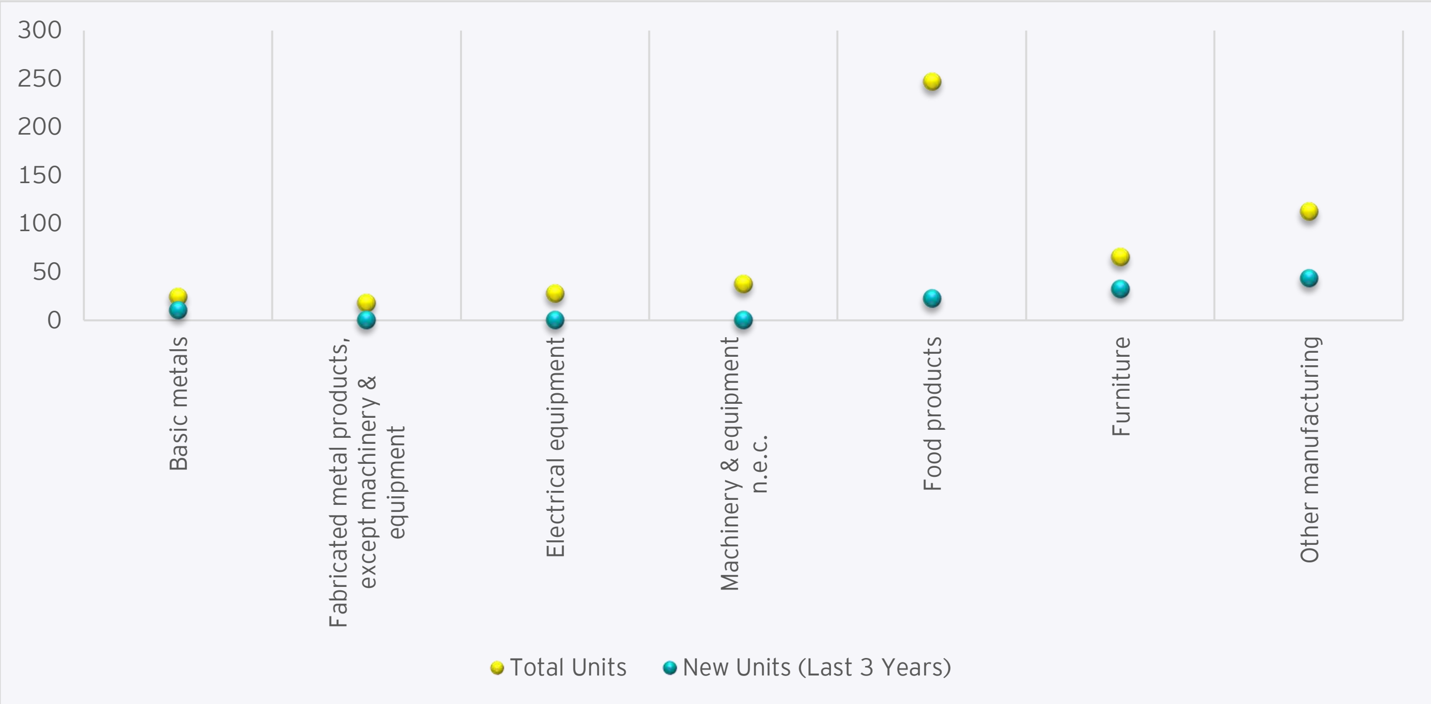


Figure 163: **[Kaithal]** Total Units & New Units in each Sector

2.1 Top 10 Sectors: Based on Number of Units

Following table shows top ten sectors in Kaithal, based upon the total number of MSME units in the district.

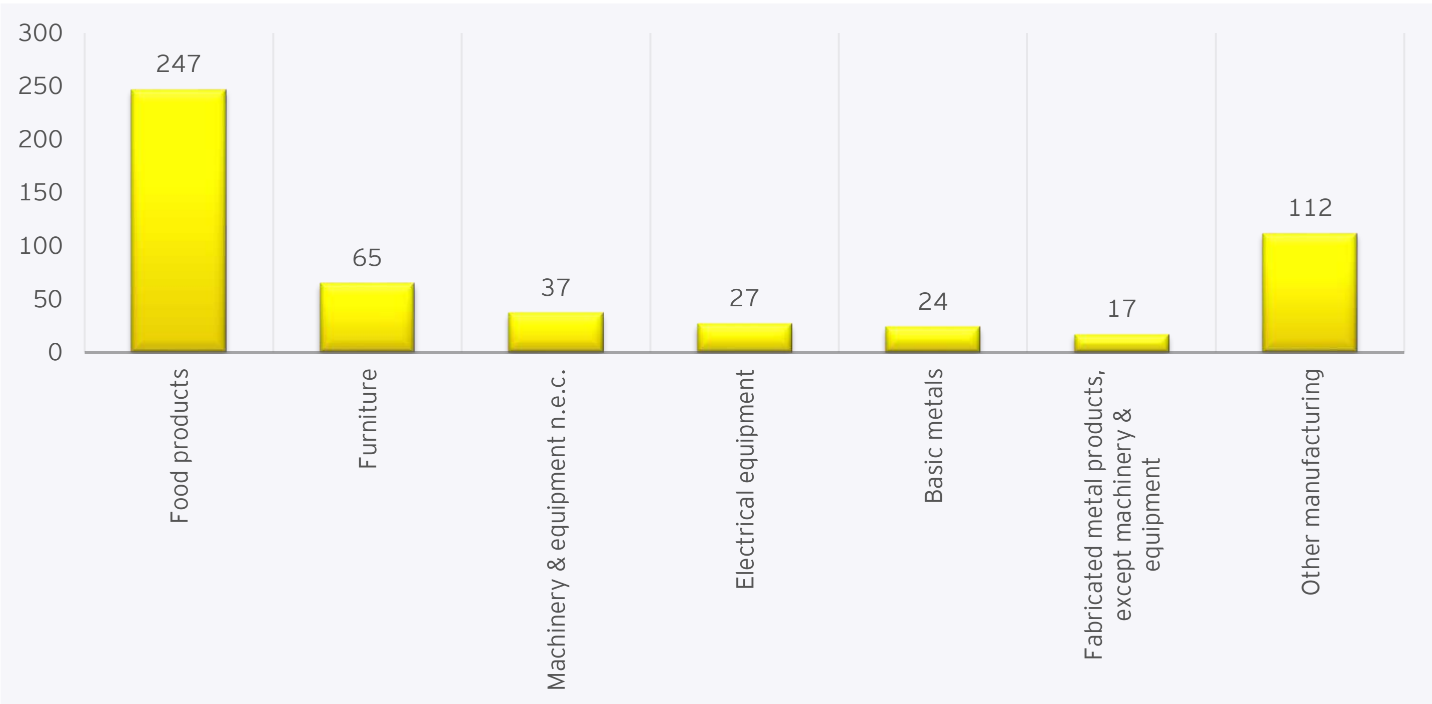


Figure 164: **[Kaithal]** Top 10 sectors - Total No. of MSME Units

2.2 Top 10 Sectors: Based on New Units in Last 3 Years

Following table shows the top ten sectors in Kaithal, based upon number of new MSME units set-up in the last three years.

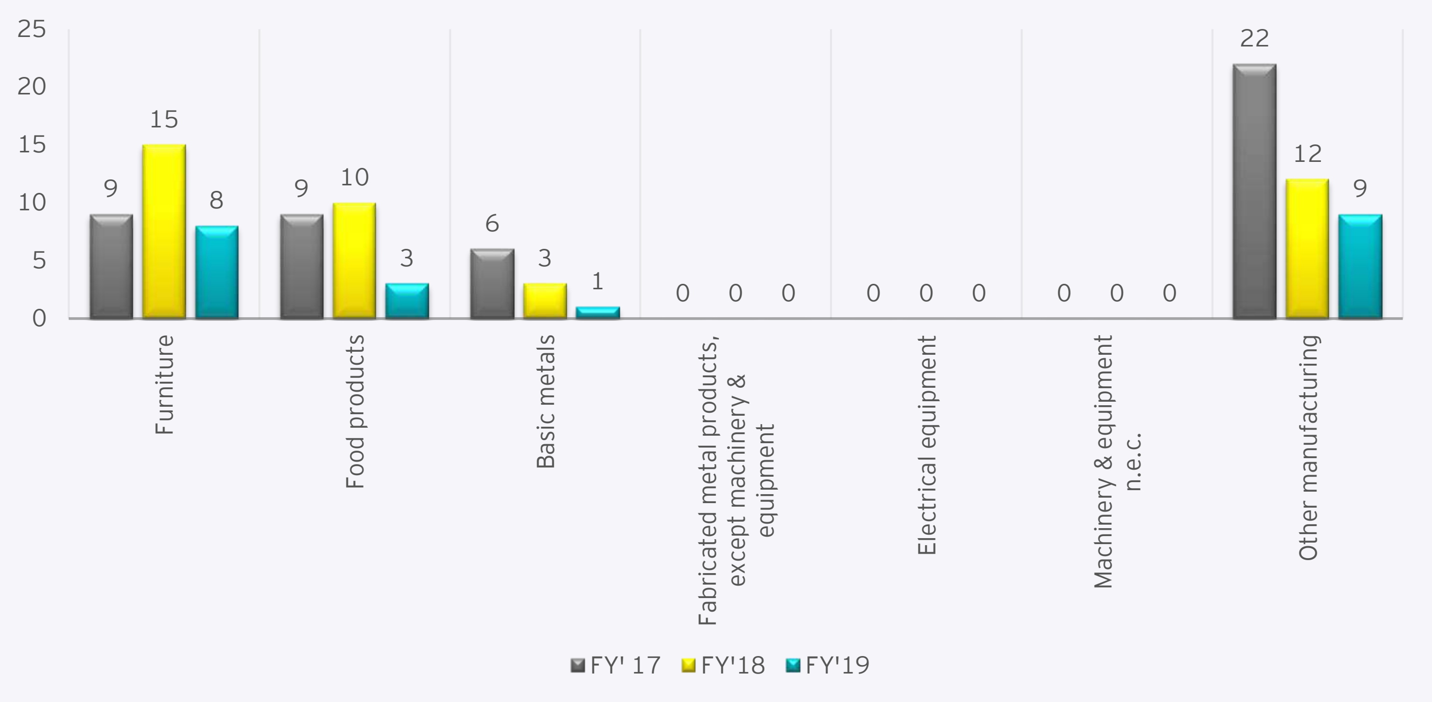


Figure 165: **[Kaithal]** Top 10 Sectors - New Units in Last 3 Years

Key Takeaways

- Maximum number of MSME units in Kaithal are involved in the food products and furniture sectors, followed by machinery and equipment.
- In the last three years as well, furniture sector has seen maximum number of new MSME units opened (32), followed by food products (22) and basic metals (10).
- In terms of the percentage growth, furniture sector in Kaithal has seen an increase in recent growth with 49% of the total units having opened-up in the last 3 years, followed by basic metals.

3. SECTOR WISE INVESTMENT SCENARIO

Punjab National Bank is the convener bank of State Level Bankers' Committee (SLBC) in Haryana and also the district lead bank of Kaithal.

Following table shows the total Investment by MSMEs in each sector in Kaithal, along with new investment in the last three financial years (figures are in Lakhs).

Table 160: **[Kaithal]** Total Investment by MSMEs

S. No.	Industry	Investment (INR Lakhs)				
		Total Investment	FY'17	FY'18	FY'19	New Investment (Last 3 Years)
Metals & Mineral Products						
1	Basic metals	617	52	27	15	94
2	Fabricated metal products, except machinery & equipment	359	0	0	0	0
Electrical, Electronics & Machinery						
3	Electrical equipment	309	0	0	0	0
4	Machinery & equipment n.e.c.	1001	0	0	0	0
Food, Beverages & Tobacco						
5	Food products	21674	741	915	440	2096
Leather, Wood & paper						
6	Furniture	296	45	75	40	160
Other manufacturing						
7	Other manufacturing	3560	682	372	279	1333

Following scatter diagram shows a comparison of total MSME investment and new investment in the last 3 financial years, across different sectors of Kaithal.

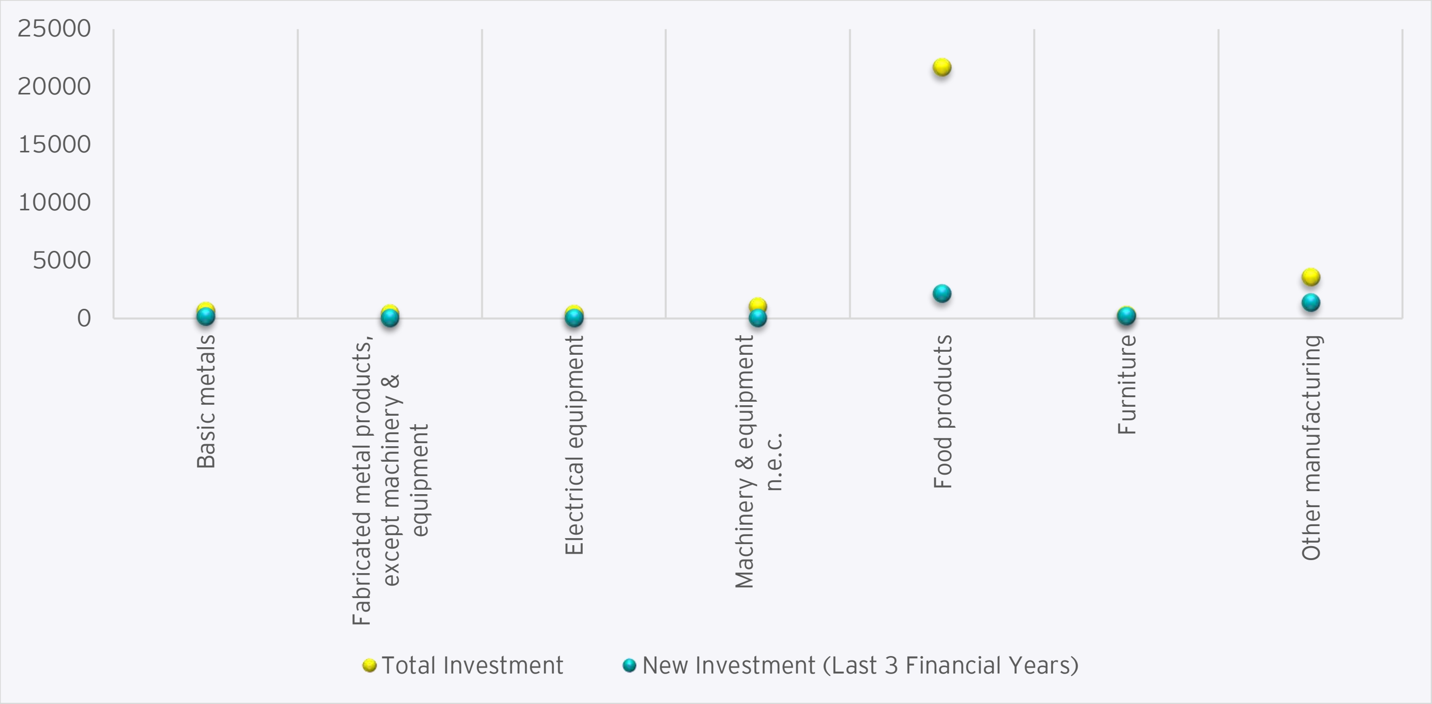


Figure 166: **[Kaithal]** Total Investment & New Investment in Last 3 Financial Years (FY'17-FY'19)

Following pie-chart showcases the sectors that have attracted maximum investments in the last 3 financial years (figures are in Lakhs).

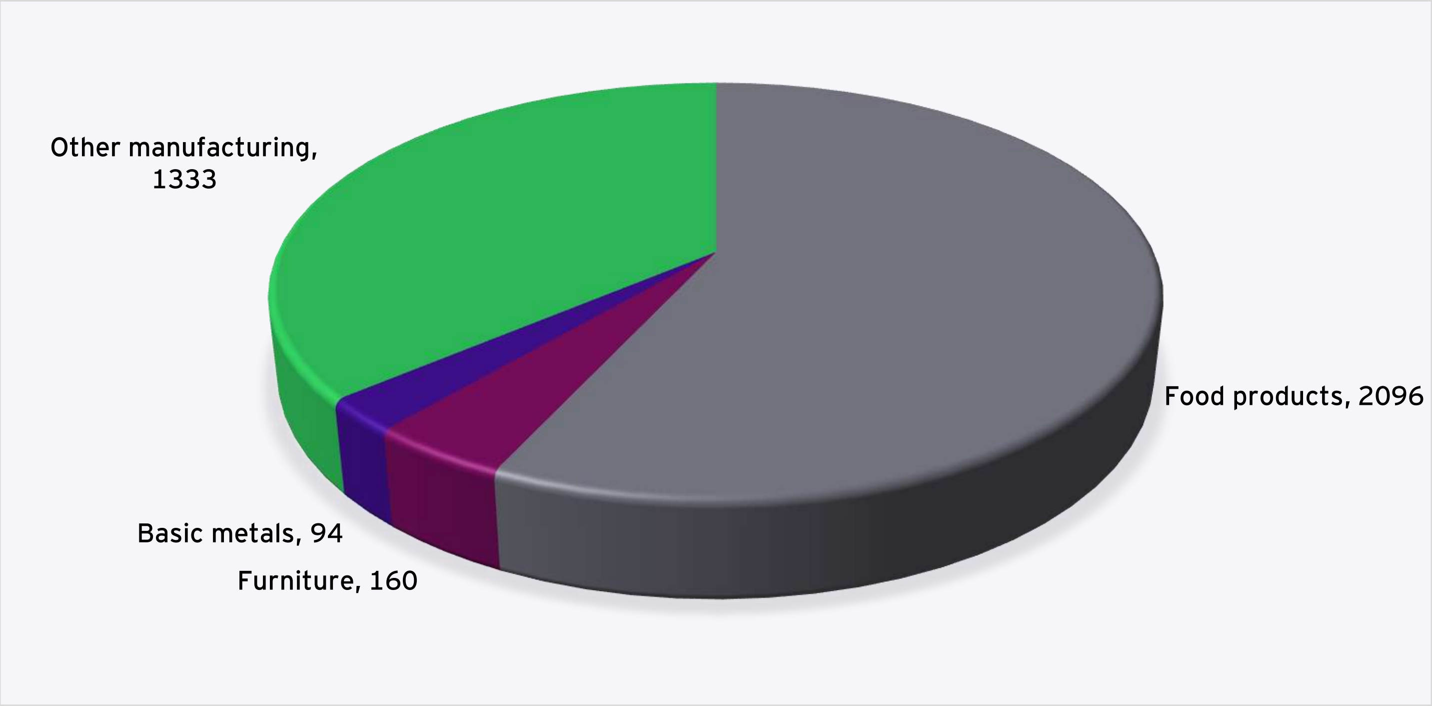


Figure 167: **[Kaithal]** Top 5 Sectors with maximum investment in last 3 Financial Years (FY'17-FY'19)

Following diagram shows a comparison of compound annual growth rate of various sectors for last three financial years.

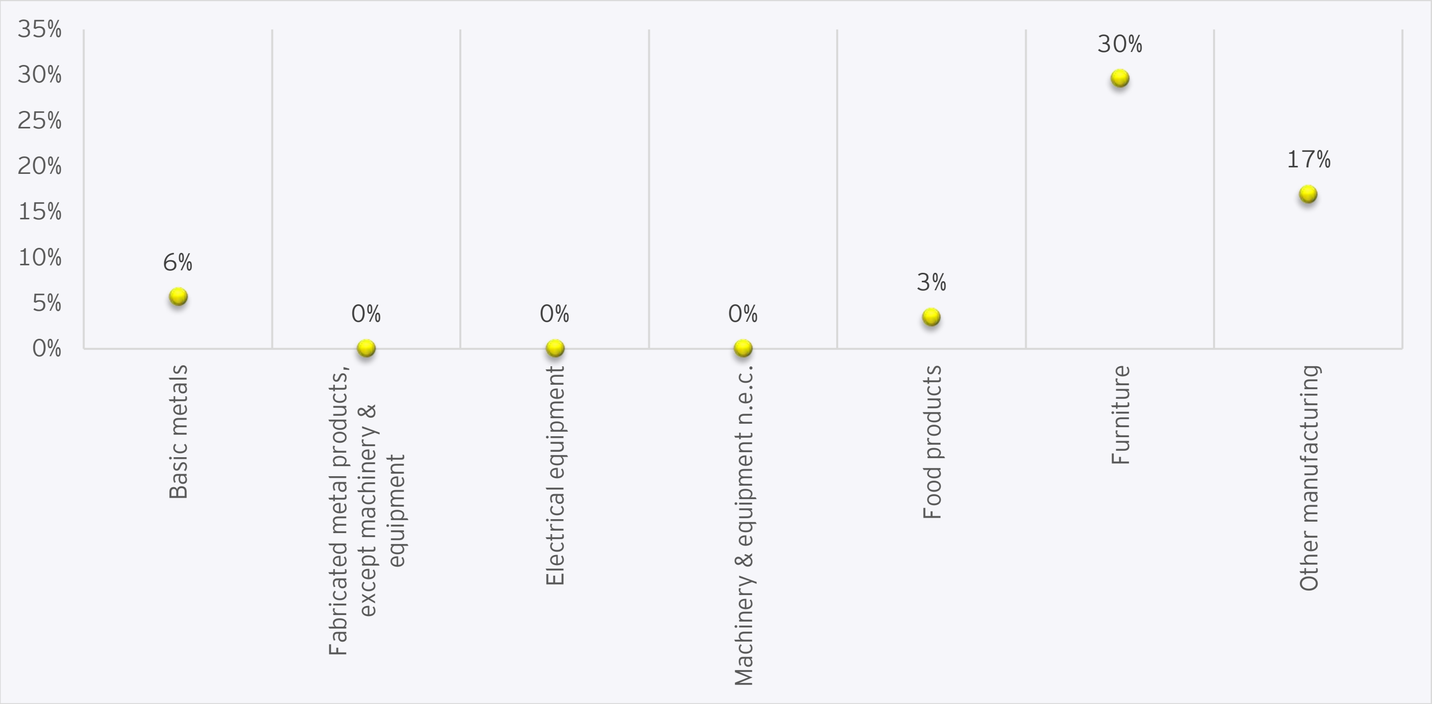


Figure 168: **[Kaithal]** CAGR for Last 3 Financial Years (FY'17-FY'19)

Key Takeaways

- Highest amount of investment by MSMEs in Kaithal has been in food products (INR 216.74 Cr.), followed by machinery & equipment sector (INR 10.01 Cr.).
- Besides being the sector with highest total investment food products sector also attracted maximum investment in the last three financial years (INR 20.96 Cr.) followed by furniture (INR 1.60 Cr.).
- Sectors with high CAGR in MSME investments in the last 3 FYs are: furniture (30%), basic metals (6%) and food products (3%).

4. SECTOR WISE EMPLOYMENT SCENARIO

Below table showcases the total employment created by MSMEs in each of the sectors, along with new employment created in the last three financial years.

Table 161: **[Kaithal]** Total Employment in each Sector

S. No.	Industry	Total employment	FY'17	FY'18	FY'19	New Employment (Last 3 Years)
Metals & Mineral Products						
1	Basic metals	145	8	6	3	17
2	Fabricated metal products, except machinery & equipment	121	0	0	0	0
Electrical, Electronics & Machinery						
3	Electrical equipment	126	0	0	0	0
4	Machinery & equipment n.e.c.	310	0	0	0	0
Food, Beverages & Tobacco						
5	Food products	2746	102	115	30	247
Leather, Wood & paper						
6	Furniture	198	27	45	24	96
Other manufacturing						
7	Other manufacturing	648	110	60	45	215

Following scatter diagram shows a comparison of total employment across different MSME sectors and new employment generated in the last 3 financial years.

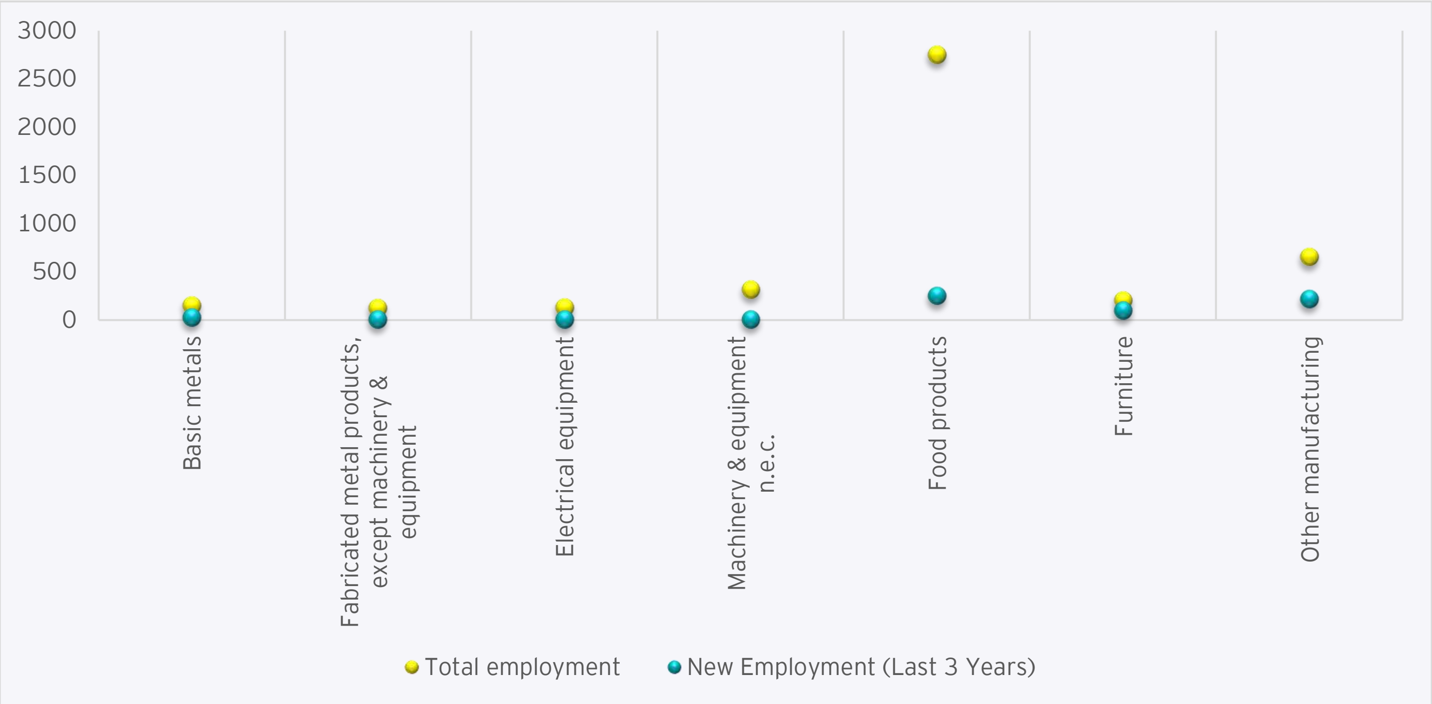


Figure 169: **[Kaithal]** Total Employment & New employment in last 3 Financial Years (FY'17-FY'19)

Following bar chart showcases category wise per unit employment analysis for MSMEs in Kaithal.

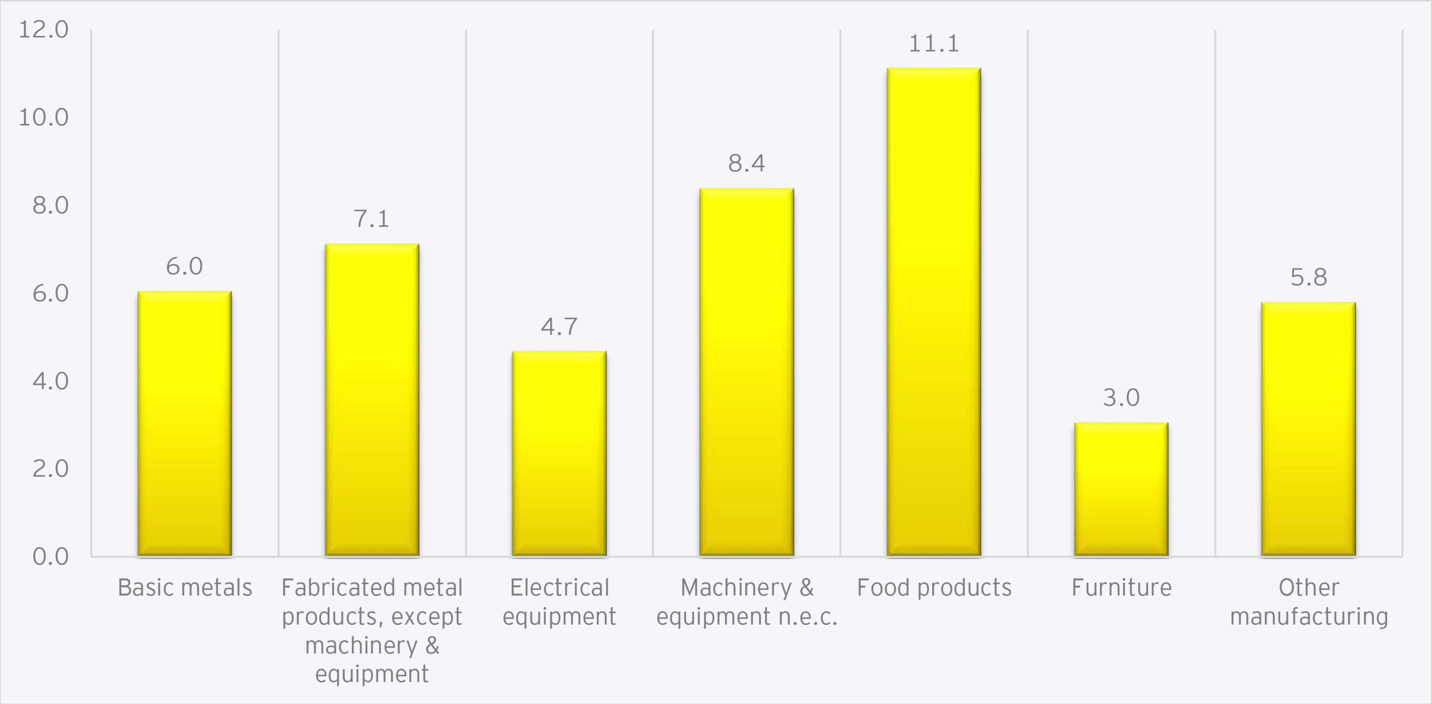


Figure 170: **[Kaithal]** Category wise employment intensity

Following pie-charts showcase the sectors that have created maximum employment in each of the last 3 financial years.

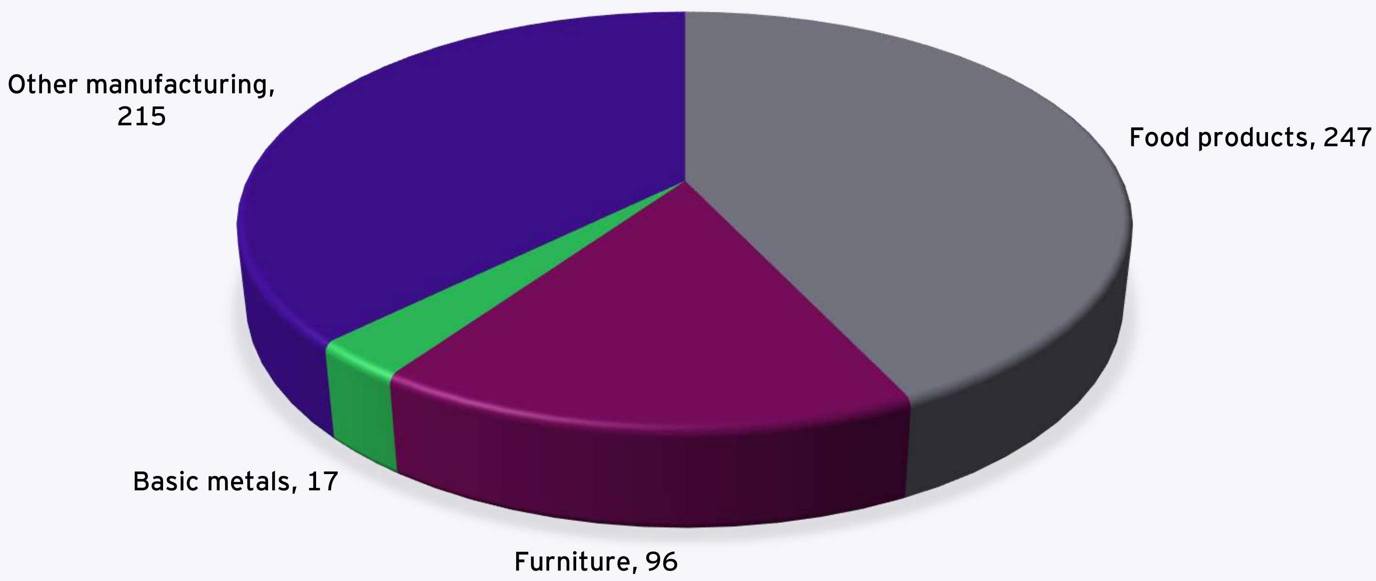


Figure 171: **[Kaithal]** Top 5 Sectors with maximum new employment in last 3 Financial Years (FY'17-FY'19)

Key Takeaways

- Food products MSME sector provides the maximum employment (2746) followed by machinery & equipment sector (310) and furniture sector (198).
- Further, food products (247) and furniture (96) sectors have also created the maximum new employment in last 3 years, followed by basic metals sector (17).
- Food products sector has maximum employment intensity with an average of 11.1 employees per unit, followed by manufacturers of machinery & equipment with 8.4 employees per unit and manufacturers of fabricated metal products at 7.1 employees per unit.
- Furniture has the least employment intensity with only 3.0 employees per unit, followed by electrical equipment at 4.7 employees per unit.
- Sectors such as fabricated metal products, electrical equipment, have experienced zero growth in new employment.

5. EXPORTS FROM THE DISTRICT

Key exports products from Kaithal include foundry items, basmati rice etc.

Exports worth **INR 2,48,045.00 Lakhs** and **INR 73,514.79 Lakhs** were reported from Kaithal district for the year 2017-2018 and 2018-2019, respectively.

(The export data in the table shows only exports related information that is available at the District Industries Centre, Kaithal, and actual exports figure might be significantly higher).

6. NATURAL RESOURCES & RAW MATERIAL AVAILABLE

The district region can be classified under three physiographic categories, i.e., Ghaggar flood plain, bet Kaithal and Kaithal plain.

The district is formed of alluvium (recent) rocks. While the soil in the Kaithal district are mostly loam and silty clay.

There are two important streams, Markanda and the Saraswati, that enter the district through Kurukshetra and finally join the Ghaggar.

Some of the prominent trees found in the region are Shisham, Kikar, Aam, Peepal, Badh, etc.

Major Kharif crops of Kaithal district are paddy, American cotton and sugarcane. Minor Kharif crops are maize, bajra, kharif pulses and kharif vegetables.

Major Rabi crops of Kaithal district are wheat and oil seeds while the minor rabi crops are potato, onion, massar and vegetables.

7. SERVICES SECTOR SNAPSHOT

Below table gives snapshot of the services sector in Kaithal:

Table 162: **[Kaithal]** Services Sector Snapshot

S. No.	Industry	Total Units	Micro	Small	Medium	Total Investment (INR Lakhs)	Total employment
1	Education	102	97	5		510	357
2	Food and beverage service activities	92	84	8		552	321
3	Computer programming, consultancy and related activities	76	73	3		402	264
4	Other personal service activities	533	497	36		2791	1868

8. CLUSTERS SCENARIO

Kaithal has two mini clusters under implementation, Rice cluster and Foundry cluster.

Table 163: Mini Clusters in Kaithal

S. No.	Cluster	Location	Cluster Identification	DSR Preparation	DPR Preparation	Implementation
1	Rice Cluster	Kaithal	√	√	√	√
2	Foundry Cluster	Kaithal	√	√	√	√

District Kaithal has a significant presence of Food products and Furniture MSME units. There is a potential for new cluster development in these industries.

9. INDUSTRY ASSOCIATIONS

There are four industrial associations in Kaithal.

Table 164: Industry Associations in Kaithal

S. No.	Name of Association	Name of President	Address	Contact
1	Haryana Chamber of Commerce & Industries Association	Sh. Deepak Garr, President	Kaithal M/S MRF Tyre & Engg. Jind Road, Kiathal	9896479434
2	Rice Mills Association Kaithal	Sh. Mange Ram Khurana, President	M/S S.D. Rice & General Mill Kutubpur Road, Kaithal	9812008891
3	Foundry Association Kaithal	Sh. Chander Gupta Shorewalla, President	M/s O.K. Engg. New Karnal Road, Kaithal	9416036300
4	Rice Mill Association	Sh. Mahavir Prasad Singla, President	M/s Shri Ram Rice Mill, Cheeka, Kaithal	941611199
5	Oil Mills Association Kaithal	Sh. Shiv Narayan, President	M/s Durga Oil Mill, Cheeka Road, Kaithal	9812036753

10. KEY ISSUES OF THE INDUSTRIES

Some of the key challenges faced by industries in Kaithal are:

- Lack of access to market, marketing information. Most of the companies are still relying on the traditional marketing system involving agricultural bazaars and middlemen.
- Lack of availability of trained, skilled workforce; shortage of manpower.
- The raw material is expensive and there is no proper facility available for testing quality.
- Lack of proper infrastructure. There are no dedicated industrial areas/estates in the district.
- Solid waste and waste sand are disposed in open areas, road side leading to pollution.

11. POTENTIAL AREAS OF INTERVENTION

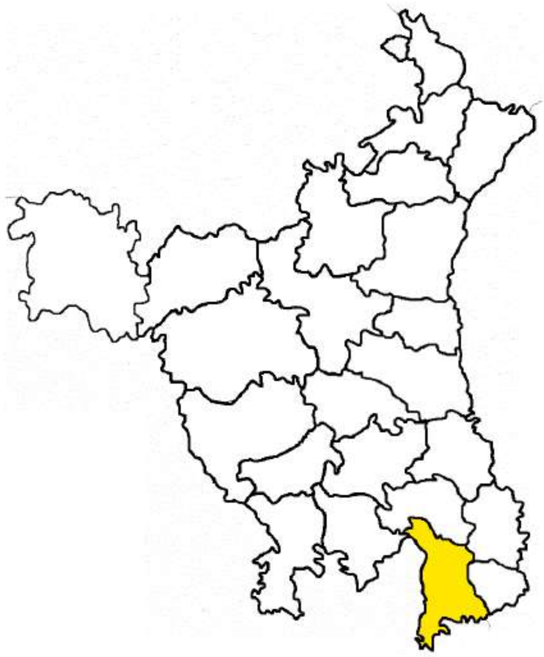
- DIC Kaithal can conduct workshops/seminars for the industry in Kaithal on new age marketing concepts such as e-commerce, digital marketing, consumer/trade promotions etc.
- DIC can take a lead to ensure greater collaboration between technical institutes in the district and the local industry.
- Industries department may look at the possibility of a common facility center with required testing facilities for the local industry.
- HSIIDC may plan to set up an Industrial area in the district equipped with facilities such as STP, ETP etc.

12. POTENTIAL AREAS OF INVESTMENT

- The key Industrial sector in Kaithal is the 'Food Products' Industry, with around 247 units currently operational in the district. There is significant scope for investment towards downstream value chain food products and investment in marketing for these units such as e-commerce, physical store retailing, and sales enablement in newer markets.
- Furniture is another fast-growing sector in Kaithal with 65 units in total, 32 of whom have started operations in last 3 years. Sector offers significant investment opportunity in advanced technology facilities such as laser cutting & engraving etc. which can help the local industry in product diversification & improving product quality.

20. Nuh

District Profile



EXECUTIVE SUMMARY

District Profile

MSME Scenario

20

Nuh

Famous for....

"Growing Textile Industry"

1 MSMEs in Nuh

Total number of MSME units **518**

New MSME units (last 3 years) **230**

Textiles
Food Products
Wood & Products of wood
Electrical Equipment
Fabricated Metal Products

Top 5 sectors – Maximum number of MSMEs

2 Investment Scenario in Nuh

Total Investment (INR Lakhs) **9,196**

New Investment (last 3 years; INR Lakhs) **2,403**

Rubber & Plastic Products
Motor vehicles, trailers & semi-trailers
Food Products
Machinery & Equipment
Textiles

Top 5 sectors – Maximum investment by MSMEs

3 Employment Scenario in Nuh

Total Employment **3,489**

New Employment (last 3 years) **1,211**

Textiles
Food products
Motor vehicles, trailers & semi-trailers
Rubber & Plastics Products
Fabricated Metal Products

Top 5 sectors – Most employment generated

4 Potential for MSMEs

Significant opportunity for procuring textile products from Nuh for manufacturing of downstream products or marketing /retailing in new markets

Food Products sector also has more than 75 units in Nuh, offering opportunity for investment towards raw materials supplies to these units

5 Others

Total Exports (FY 18-19; INR Lakhs) **34,643**

Number of Large & Mega units **5**

Existing Clusters **No clusters currently**

1. INTRODUCTION

Nuh, earlier a part of Gurgaon & Faridabad, was carved out as a separate district in April 2005, and some areas of Nuh were transferred to the New district of Palwal in 2008. The district is located on the Gurugram – Sahpura highway NH 248A & the Western Peripheral Expressway from Kundli to Palwal.

1.1 Geography

Nuh is the southern-most district of the Haryana state, and is surrounded by Gurugram on the north, Palwal on the east, Alwar district of Rajasthan on the west & Bharatpur distt. Of Rajasthan on South. The terrain of the district mostly consists of alluvial plains with ridges in certain areas.

Nuh has mostly hot, semi-arid, tropical steppe climate with extremely hot summers & winters. District receives rainfall mostly in monsoon from July to September and has largely dry climate in other months. The district has no rivers and is served by a canal and drained by artificial drains such as Kotla, Ujina & Nuh.

1.2 Demographic Profile

As per the census of 2011, total population of Nuh is 10.89 Lakhs persons with a population density of 723 per sq. km. It constitutes approximately 4.30% of total Haryana population. Rural to urban percentage distribution is 88.61% & 11.39% respectively. Average literacy rate of Nuh is 54.08% with a male literacy rate of 69.94% and female literacy rate of 36.60 %. The district has a female to male ratio at 907 females per thousand males, which is significantly higher than the state average of 877 but lower than the national average of 940. Population growth for Nuh for the decade 2001-2011 is 37.93%.

1.3 Administrative Set-up

Nuh has a total land area of 1859.61 Sq. Km. The district has four tehsils namely Nuh, Firozepur Jhirka, Punhana, Tauru and one sub-tehsils namely Nagina. Nuh also has 4 sub-divisions, 7 blocks & 443 villages.

The following table shows categorization of blocks as per the status of industrial development.

Table 165: **[Nuh]** Categorization of Blocks

Block A	Block B	Block C	Block D
	Taoru	Nuh	Nagina
		Indri	Ferozepur Jhirka
			Punhana
			Pingwan

2. SECTOR WISE MSME LANDSCAPE

Following table shows the total number of MSME units in each sector, in Nuh, along with the bifurcation of number of micro, small and medium enterprises.

The table also shows number of new units that started their commercial production in the last three financial years.

Table 166: **[Nuh]** No. of MSME Units in each Sector

S. No.	Industry	Total Units	Micro	Small	Medium	New Units (Last 3 Years)
Food, Beverages & Tobacco						
1	Food products	76	73	3		12
Textiles & Apparel						
2	Textiles	301	300	1	0	181
3	Wearing apparel	8	8	0	0	6
Leather, Wood & paper						
4	Leather and related products	5	5	0	0	2
5	Wood and products of wood and cork, except furniture; articles of straw and plaiting materials	17	15	2	0	3
6	Paper and paper products	6	6	0	0	4
7	Furniture	13	12	1	0	2
Pharma, Petro-Chemicals, Rubber products						
8	Pharmaceuticals, medicinal chemical and botanical products	5	4	1	0	2
9	Chemicals and chemical products	3	2	0	1	0
10	Manufacture of coke and refined petroleum products	1	0	1	0	0
11	Rubber and plastics products	12	5	5	2	3
Metals & Mineral Products						
12	Basic metals	7	6	1	0	4
13	Fabricated metal	14	12	2	0	2

	products, except machinery and equipment					
14	Non-metallic mineral products	13	11	2	0	1
Electrical, Electronics & Machinery						
15	Computer, electronic and optical products	1	1	0	0	0
16	Electrical equipment	17	17	0	0	5
17	Machinery and equipment n.e.c.	12	9	2	1	2
Automotive & Auto-Components						
18	Motor vehicles, trailers and semi-trailers	7	3	3	1	1

Following scatter diagram shows the comparison between total units in each sector vis-a-vis new units opened in the last 3 financial years (except for textiles, which with 301 total units & 181 new units in last 3 years is an outlier).

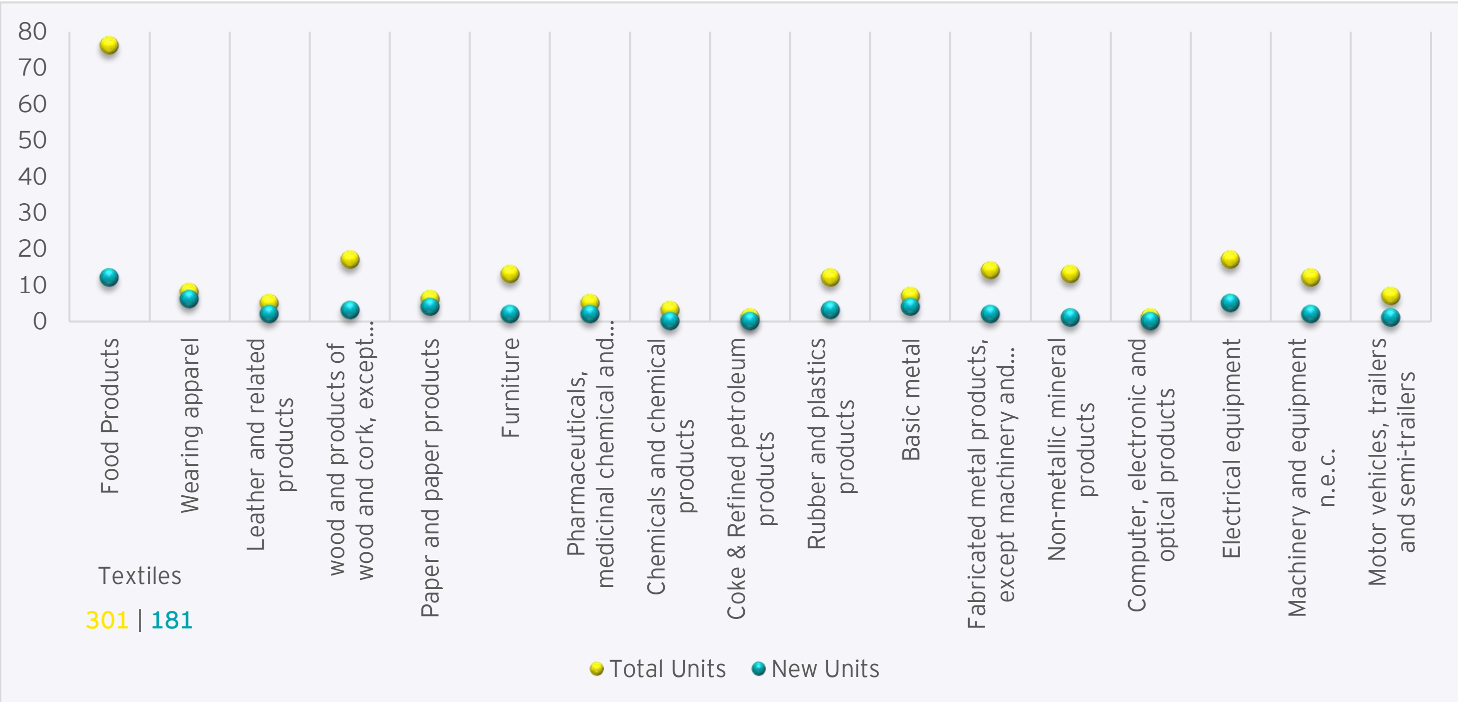


Figure 172: **[Nuh]** Total Units & New Units in each Sector

2.1 Top 10 Sectors: Based on Number of Units

Following table shows top ten sectors in Nuh, based upon the total number of MSME units in the district.

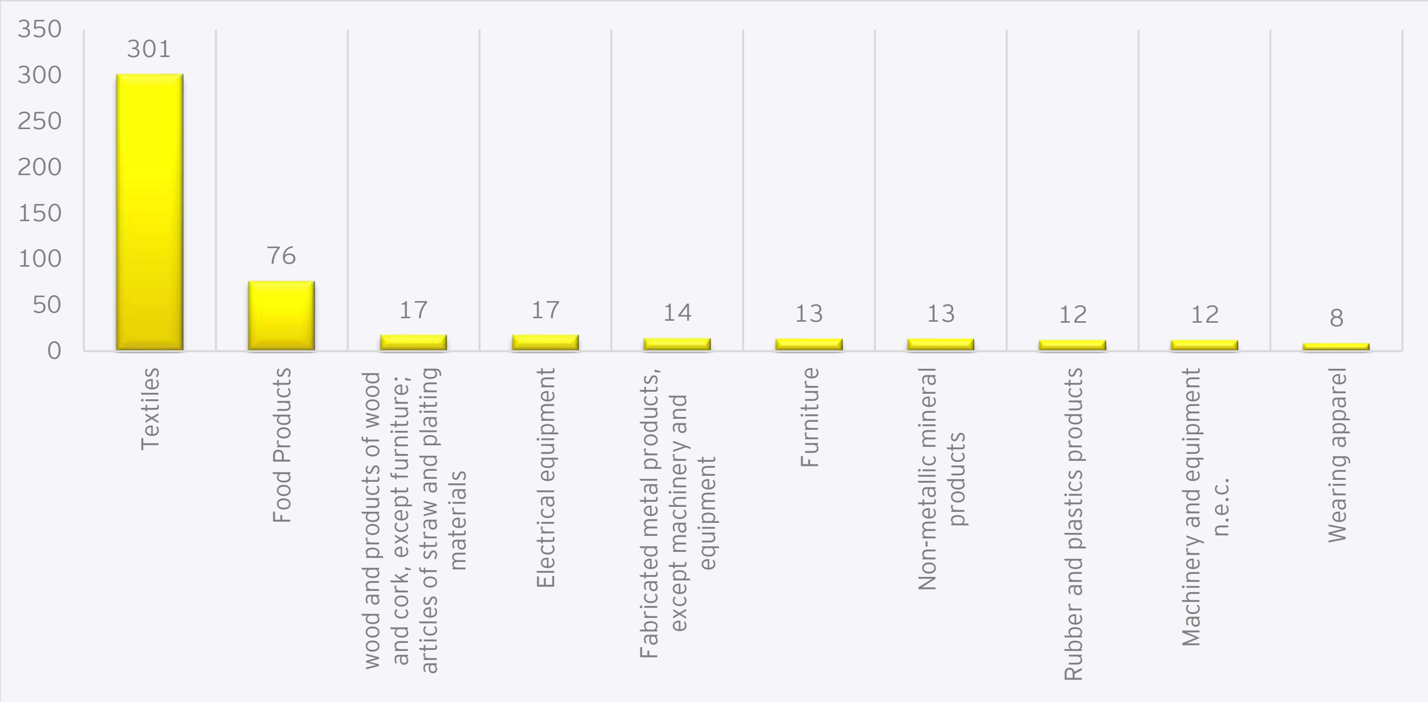


Figure 173: **[Nuh]** Top 10 sectors - Total No. of MSME Units

2.2 Top 10 Sectors: Based on New Units in Last 3 Years

Following table shows the top ten sectors in Nuh, based upon number of new MSME units set-up in the last three years.

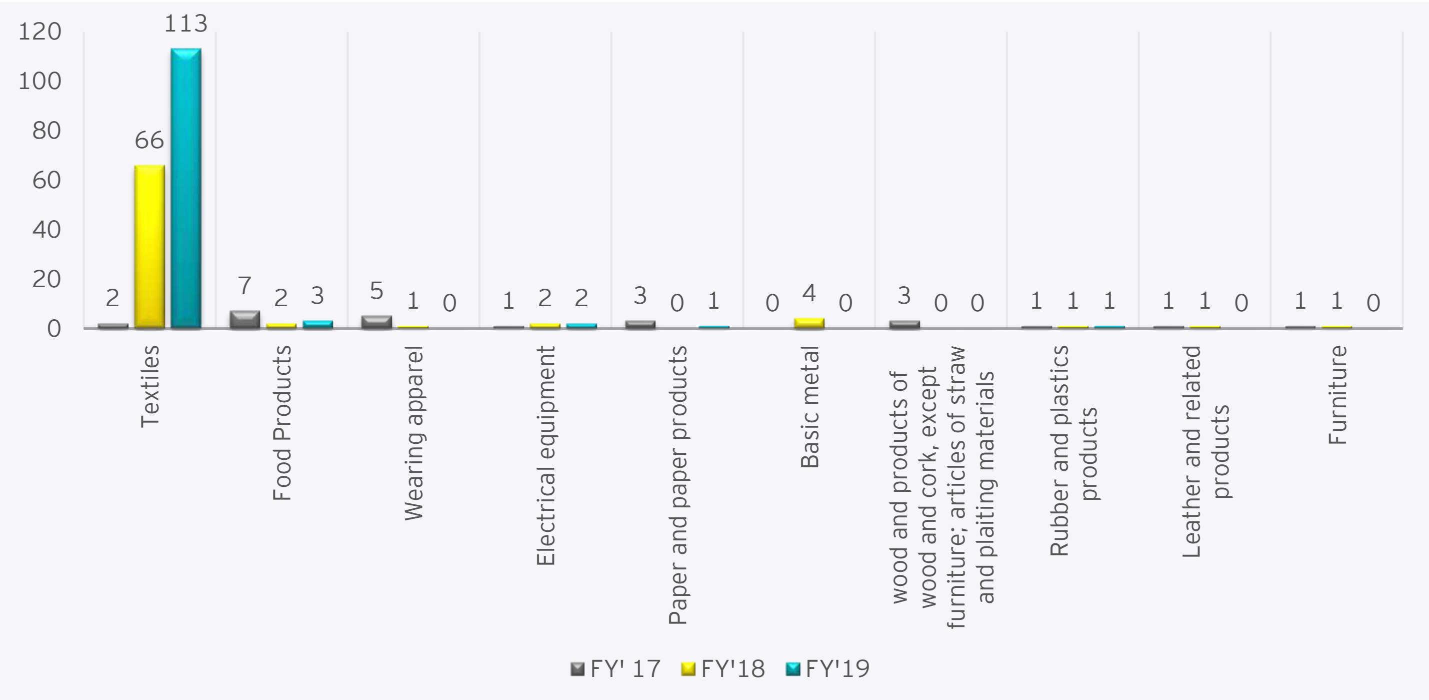


Figure 174: **[Nuh]** Top 10 Sectors - New Units in Last 3 Years

Key Takeaways

- Maximum no. of MSME units in Nuh are involved in the 'textiles' sector, followed by 'Food products'.
- Apart from textiles & food Products; wood & products of wood, electrical equipment & fabricated metal products have significant number of MSMEs operating out of Nuh.
- In last three years also, 'textiles' sector has seen maximum number of new MSME units opened (181), followed by food products (12) & wearing apparel (6).
- In terms of percentage growth, wearing apparel has experienced impressive recent growth with 75% of the total units having opened up in the last 3 years, followed by 'paper & paper products' (66.66%) & textiles (60.13%).

3. SECTOR WISE INVESTMENT SCENARIO

Punjab National Bank is the convener bank of State Level Bankers' Committee (SLBC) in Haryana. While Syndicate Bank is the district lead bank of Nuh.

Following table shows the total investment by MSMEs in each sector in Nuh, along with new investment in the last three financial years (figures are in Lakhs).

Table 167: **[Nuh]** Total Investment by MSMEs

S. No.	Industry	Investment (INR Lakhs)				
		Total Investment	FY'17	FY'18	FY'19	New Investment (Last 3 Years)
Food, Beverages & Tobacco						
1	Food products	953	66	35	18	119
Textiles & Apparel						
2	Textiles	862	8	218	275	501
3	Wearing apparel	43	35	1	0	36
Leather, Wood & paper						
4	Leather and related products	15	3	4	0	7
5	Wood and products of wood and cork, except furniture; articles of straw	240	79	0	0	79

	and plaiting materials					
6	Paper and paper products	69	40	0	25	65
7	Furniture	128	10	10	0	20
Pharma, Petro-Chemicals, Rubber products						
8	Pharmaceuticals, medicinal chemical and botanical products	49	1	4	0	5
9	Chemicals and chemical products	770	0	0	0	0
10	Manufacture of coke and refined petroleum products	350	0	0	0	0
11	Rubber and plastics products	2299	3	950	15	968
Metals & Mineral Products						
12	Basic metals	80	0	5	0	5
13	Fabricated metal products, except machinery and equipment	516	0	6	0	6
14	Non-metallic mineral products	175	0	65	0	65
Electrical, Electronics & Machinery						
15	Computer, electronic and optical products	15	0	0	0	0
16	Electrical equipment	124	15	15	20	50
17	Machinery and equipment n.e.c.	947	0	1	238	239
Automotive & Auto-Components						
18	Motor vehicles, trailers and semi-trailers	1561	0	0	238	238

Following scatter diagram shows a comparison of total MSME investment and new investment in the last 3 financial years, across different sectors of Nuh.

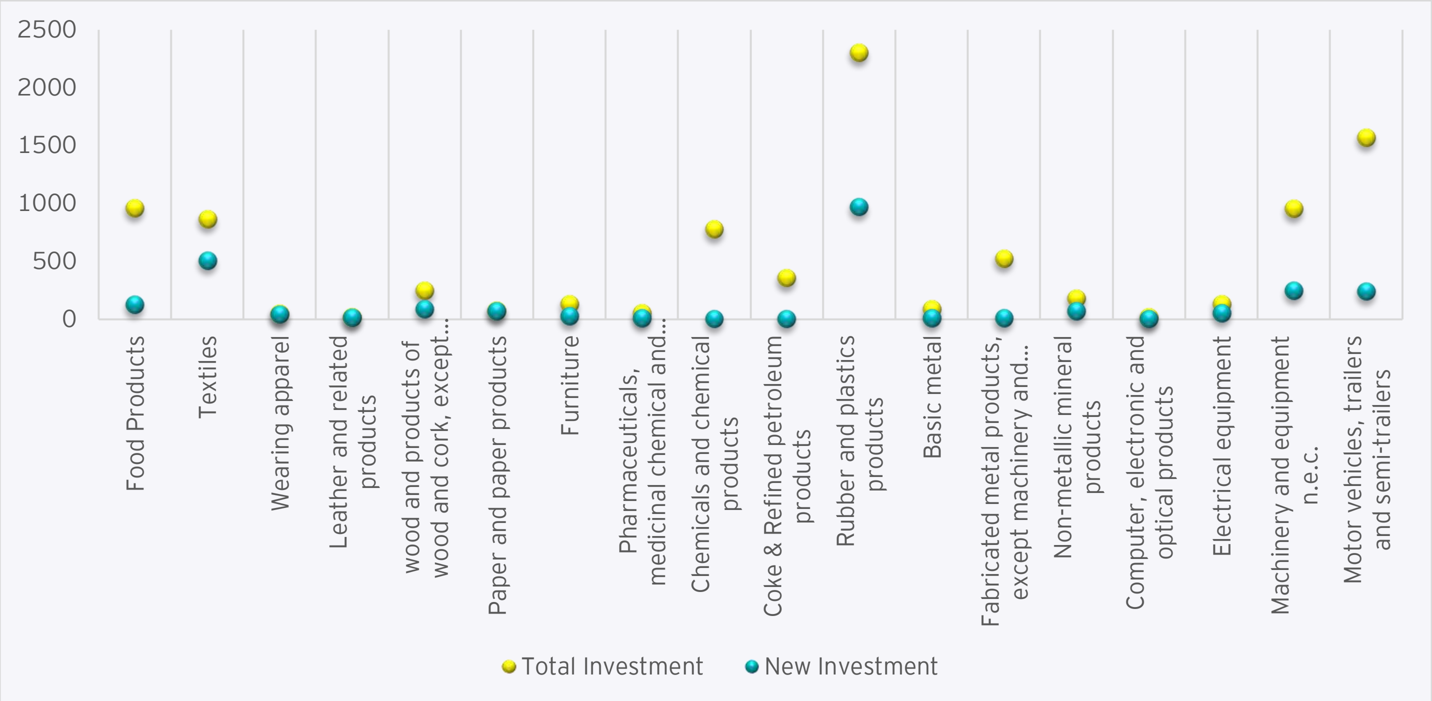


Figure 175: **[Nuh]** Total Investment & New Investment in Last 3 Financial Years (FY'17-FY'19)

Following pie-chart showcases the sectors that have attracted maximum investments in the last 3 financial years (figures are in Lakhs).

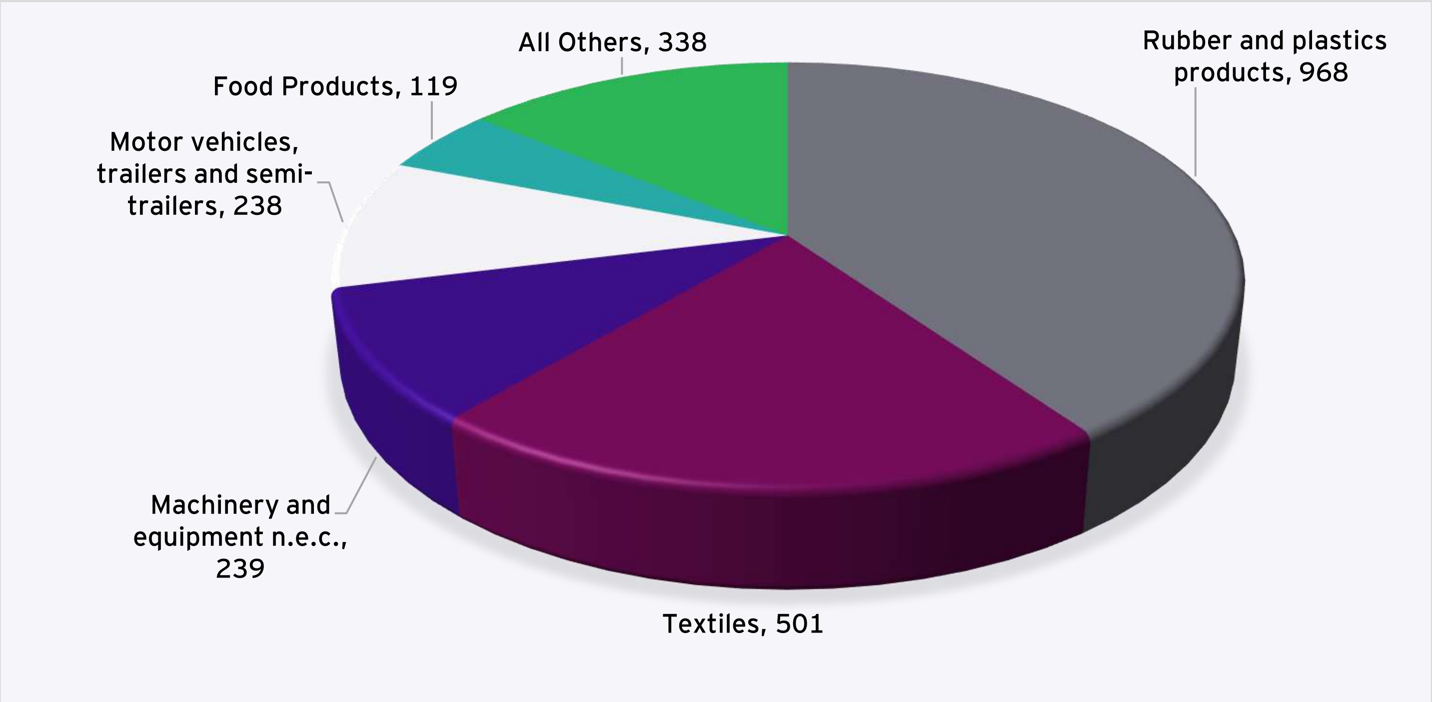


Figure 176: **[Nuh]** Top 5 Sectors with maximum investment in last 3 Financial Years (FY'17-FY'19)

Following diagram shows a comparison of compound annual growth rate of various sectors for last three financial years.

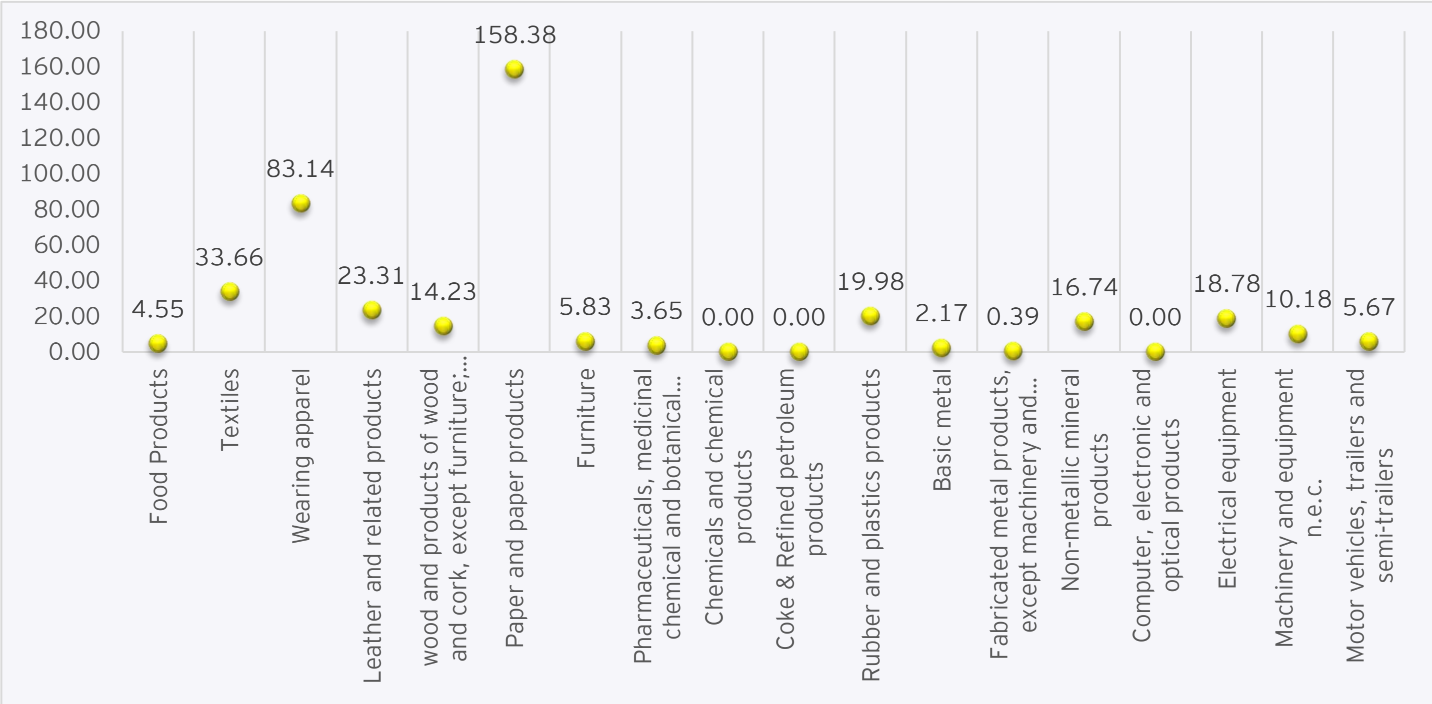


Figure 177: **[Nuh]** CAGR for Last 3 Financial Years (FY'17-FY'19)

Key Takeaways

- Highest amount of investment by MSMEs in Nuh has been in rubber & plastic products (INR 22.99 Cr) followed by 'motor vehicles, trailers & semi-trailers (INR 15.61 Cr).

- Apart from having the highest total investment, rubber & plastic products sector has also experienced highest new investment in the last three financial years at INR 9.68 Cr. followed by textiles sector at INR 5.01 Cr.

- As evident apart from rubber & plastic products and textiles, machinery & equipment, 'motor vehicles, trailers & semi-trailers' and food products have attracted the maximum investments in last three financial years.

- Sectors with high CAGR in MSME investments in last 3 FYS are: paper & paper products (158.38%), wearing apparel (83.14%), textiles (33.66%), leather & related products (23.31%), and rubber & plastics products (19.98%).

4. SECTOR WISE EMPLOYMENT SCENARIO

Below table showcases the total employment created by MSMEs in each of the sectors, along with new employment created in the last three financial years.

Table 168: **[Nuh]** Total Employment in each Sector

S. No.	Industry	Total Employment	FY'17	FY'18	FY'19	New Employment (Last 3 Years)
Food, Beverages & Tobacco						
1	Food products	616	47	11	12	70
Textiles & Apparel						
2	Textiles	1162	19	352	378	749
3	Wearing apparel	15	11	1	0	12
Leather, Wood & paper						
4	Leather and related products	17	2	3	0	5
5	Wood and products of wood and cork, except furniture; articles of straw and plaiting materials	144	14	0	0	14
6	Paper and paper products	31	16	0	10	26
7	Furniture	69	5	10	0	15
Pharma, Petro-Chemicals, Rubber products						
8	Pharmaceuticals, medicinal chemical and botanical products	18	2	11	0	13
9	Chemicals and chemical products	62	0	0	0	0
10	Manufacture of coke and refined petroleum products	32	0	0	0	0
11	Rubber and plastics products	239	5	119	12	136
Metals & Mineral Products						
12	Basic metals	27	0	13	0	13
13	Fabricated metal products, except machinery and equipment	188	0	29	0	29
14	Non-metallic mineral products	186	0	71	0	71
Electrical, Electronics & Machinery						
15	Computer, electronic and optical products	10	0	0	0	0
16	Electrical equipment	124	10	12	11	33

17	Machinery and equipment n.e.c.	89	0	1	12	13
Automotive & Auto-Components						
18	Motor vehicles, trailers and semi-trailers	460	0	0	12	12

Following scatter diagram shows a comparison of total employment across different MSME sectors and new employment generated in the last 3 financial years (except for textiles sector which with a total employment of 1162 is an outlier).

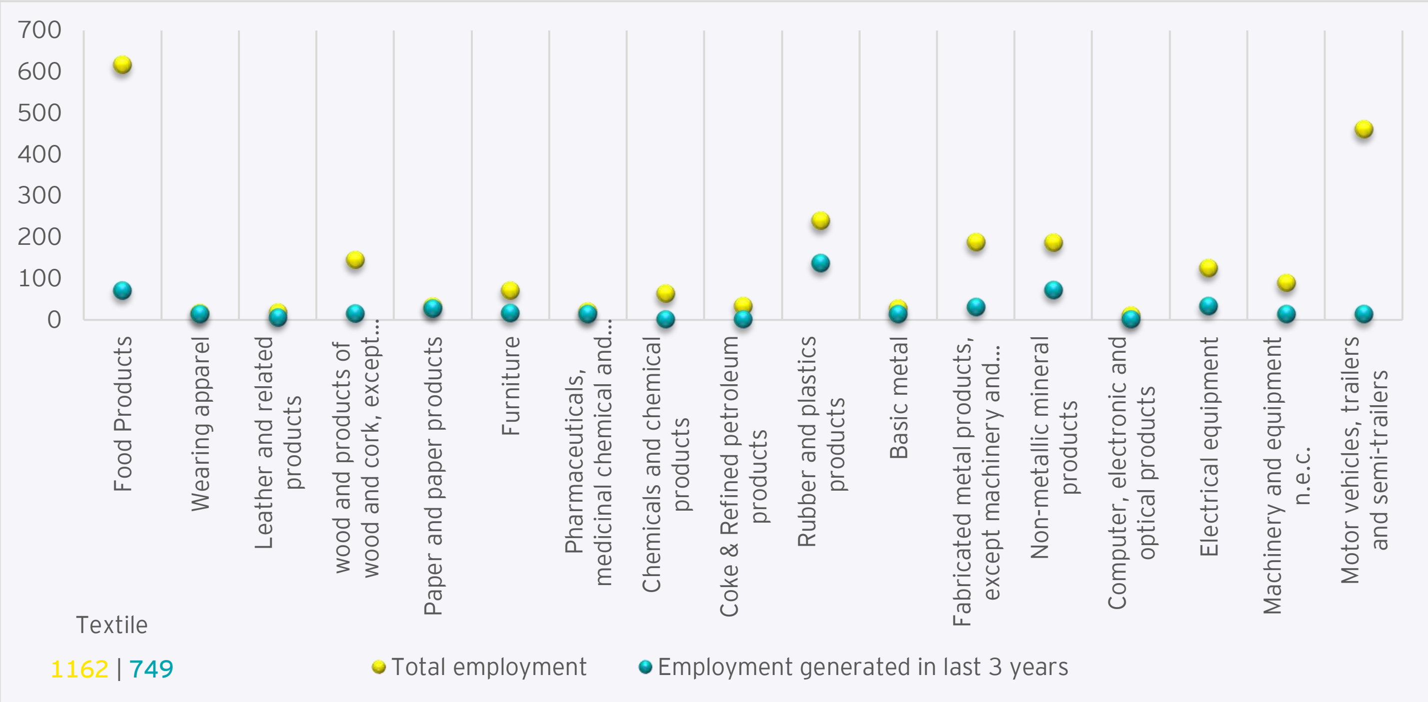


Figure 178: **[Nuh]** Total Employment & New employment in last 3 Financial Years (FY'17-FY'19)

Following bar chart showcases category wise per unit employment analysis for MSMEs in Mewat.

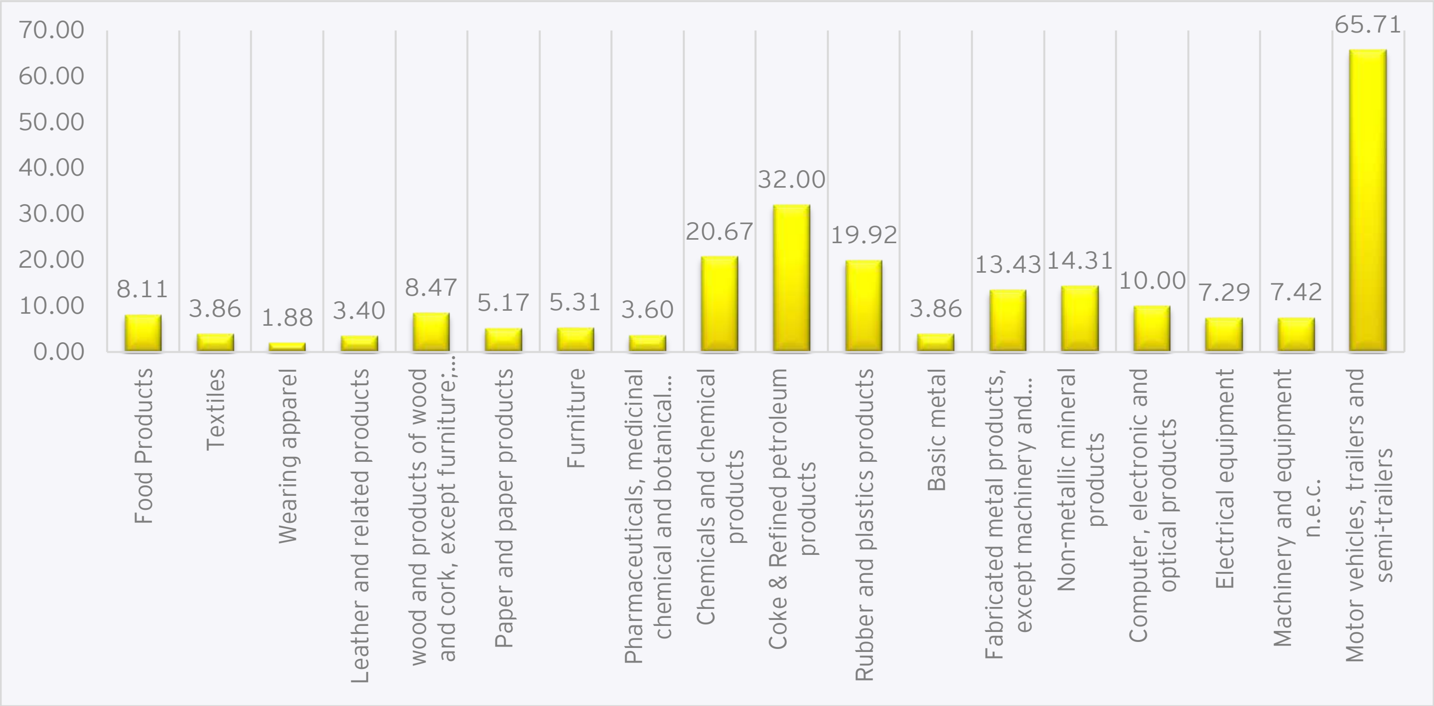


Figure 179: **[Nuh]** Category wise employment intensity

Following pie-charts showcase the sectors that have created maximum employment in each of the last 3 financial years.

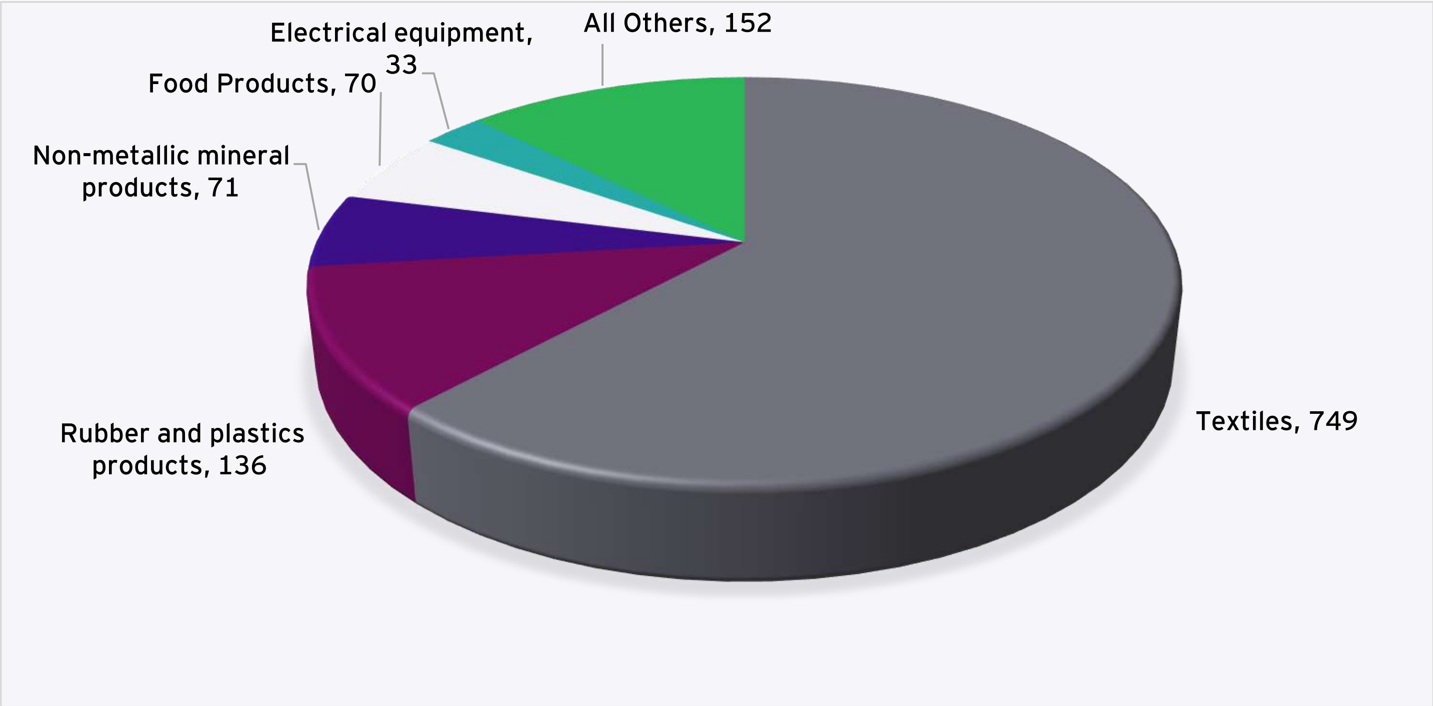


Figure 180: **[Nuh]** Top 5 Sectors with maximum new employment in last 3 Financial Years (FY'17-FY'19)

Key Takeaways

- Textile MSME sector provides the maximum employment (1162) followed by food products sector (616) & 'motor vehicles, trailers & semi trailers' (460).

- Textile sector has created the maximum new employment in last 3 years (749), followed by rubber & plastic Products (136) & non-metallic mineral products (71). Sectors such as 'computer, electronic & optical Products', 'coke & refined petroleum products & 'chemical & chemical products' have not experienced any new growth in employment.

- 'Motor Vehicles' sector have maximum employment intensity with an average of 65.71 employees per unit, followed by 'coke & refined petroleum products' with 32 employees per unit and chemical & chemical products at 20.67 employees per unit.

- Wearing apparel has the least employment intensity with only 1.88 employees per unit, followed by leather & related products at 3.40 employees per unit and pharma sector at 3.60 employees per unit.

- 'Textiles' sector has created the maximum employment in Mewat in last three years, followed by the 'rubber & plastic products' sector. Other sectors in top 5 in terms of employment creation are non-metallic mineral products, food products & electrical Equipment.

5. EXPORTS FROM THE DISTRICT

Key exports products from Nuh include categories such as 'Motor Vehicles, Trailers & Semi-Trailers', 'Rubber & Plastic Products', 'Chemicals & chemical products'. Following table shows some of the exports from Nuh for last 3 FYs.

(The export data in the table shows only exports related information that is available at the District Industries Centre, Nuh, and actual exports figure might be significantly higher).

Table 169: Exports from Nuh

S. No.	Industry	Exports (INR Lakhs)		
		FY'17	FY'18	FY'19
1	Food Products	10281.12	2871.76	190.74
2	Pharmaceuticals, medicinal chemical and botanical products	4018.96	4675.5	437.35
3	Chemicals and chemical products		77.76	744.18
4	Rubber and plastics products	133.24	8250.04	1416.09
5	Electrical equipment		78	138.23
6	Motor vehicles, trailers and semi-trailers	15810	24526.75	31716.66

6. NATURAL RESOURCES & RAW MATERIAL AVAILABLE

Major raw material available in Nuh are Cereals, Grains & Wood.

Nuh has a total forest cover of 32.16 sq km. Teak, Pine & Sal are the key flora found in Mewat.

Major agricultural produce of Nuh includes Wheat, Millets (Bajra), Garbanzo Beans (Kala Chana), Maize, Paddy, Pigeon Peas (Arhar).

Nuh also has small production of fiber crops such as Cotton, Jute and Mesta and oilseeds such as Mustard, Rapeseed, Sesamum.

7. KEY INDUSTRIAL ESTATES

Nuh currently has only 1 Industrial Estate namely Roz-Ka-Meo Industrial Estate:

Total number of Plots	20
Allotted Plots	17
Un-allotted Plots	1
Units in Production	6
Percentage of plots allotted	85%

8. MAJOR LARGE-SCALE UNITS

Apart from MSMEs, Nuh has quite a few Large & Mega enterprises operational in various sectors. Below table showcases number of Large & Mega enterprises in each sector along with their names.

Table 170: **[Nuh]** Large & Mega Units in each Sector

S. No.	Industry	Number	Names of Large & Mega Units
1	Chemical & Chemical Products (Fertilizers)	1	• Haryana Bio tech Ltd.
2	Computer, Electronic & Optical Products (Laboratory Products & Equipment)	1	• Advik Laboratories Ltd.
3	Other Manufacturing (Packaging Materials)	1	• Can Pack India Ltd.
4	Other Manufacturing (Gold & Silver Coins)	1	• MMTC PAMP India Ltd.
5	Rubber & Plastic Products (Plastic Toys)	1	• OK Play Ltd.

9. SERVICES SECTOR SNAPSHOT

Apart from manufacturing there are several MSMEs also involved in services sector. Below table gives snapshot of the services sector in Mewat:

Table 171: **[Nuh]** Services Sector Snapshot

S. No.	Industry	Total Units	Micro	Small	Medium	Total Investment (INR Lakhs)	Total Employment
1	Postal and courier services	5	5	0	0	6	27
2	Printing and Reproduction of recorder media	7	7	0	0	39	23
3	Publishing Activities	1	0	1	0	20	4
4	Real estate activities	5	3	2	0	71	31
5	Rental and leasing activities	3	2	1	0	32	12
6	Repair & installation of machinery and equipments	22	21	1	0	139	133
7	Repair of Computer & personal & household goods	19	18	1	0	44	40
8	Residential care activities	3	3	0	0	9	6
9	Retail trade except of motor vehicles and motor cycles	9	7	2	0	53	24
10	Security and investigation activities	2	2	0	0	12	4
11	Services to buildings and landscape activities	5	3	2	0	74	18
12	Sports activities and amusement and recreation activities	3	3	0	0	30	6
13	Telecommunications	20	19	1	0	68	39
14	Travel agency, tour operator and other reservation service activities	7	7	0	0	14	22
15	Warehousing and support activities for transportation	6	4	2	0	44	8
16	Waste collection, treatment and disposal activities; materials recovery	4		4	0	702	76

17	Wholesale and retail trade and repair of motor vehicles and motorcycles	2	2	0	0	18	14
18	Wholesale trade, except of motor vehicles and motorcycles	11	11	0	0	63	26

10. CLUSTERS SCENARIO

There are at present no clusters in Nuh at any stage of implementation. However, given significant number of MSME units in 'Textiles' & 'Food Products' sector, there is potential for clusters-based intervention in these sectors.

11. INDUSTRY ASSOCIATIONS

There's only 1 prominent Industrial Association in Nuh; details are as under.

Table 172: Industry Associations in Nuh

S. No	Name of the Association	Name of the President/General Secretary	Address	Contact number/ Mobile number	Email I.D.
1	Industry Association Mewat (Roz Ka Meo)	Mr. R.P. Khatana	Plot No. 34 & 44 Hyline Auto pvt. Ltd.	9811148104	khatanarp@gmail.com

12. KEY ISSUES OF THE INDUSTRIES

Following are some of the key issues raised by the industry in Nuh:

- Acute sewerage problem in and around Roz Ka Meo Industrial Area because of lack of any facility for safe disposal of Industrial as well as domestic waste.
- Bad water supply with a high PPM level of around 3200 which is hazardous for domestic as well as industrial consumption.
- Irregular electricity supply in most areas.
- Rise in road level leading to water logging in Industries that are on the front side of the Industrial Area.
- Lack of proper law enforcement, leading to cases of obstruction in day-to-day activities of industries by local miscreants for undue favours.
- Lack of adequate street lights in Industrial areas leading to safety issues of the

belongings of the workforce.

13. POTENTIAL AREAS OF INTERVENTION

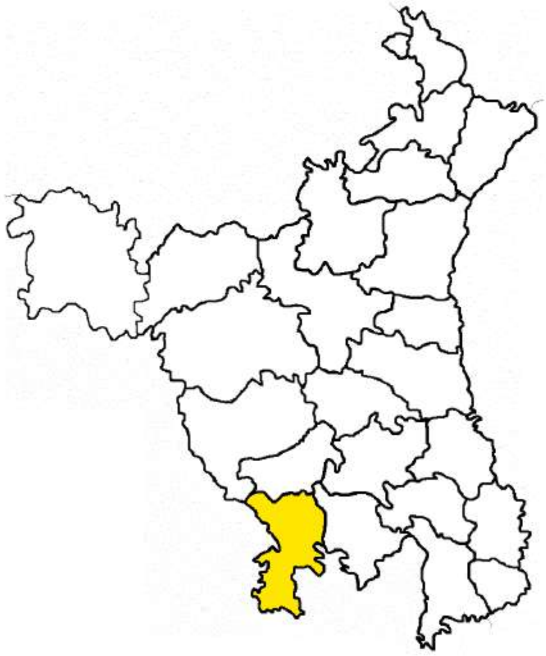
- Industries department can look into the possibility of cluster based hard & soft interventions for Textiles & Food Products sector in Nuh.
- An ETP & STP plant may be set-up in Roz ka Meo Industrial area to address the issue of safe disposal of Industrial & domestic waste.
- Bad Water supply issue needs to be taken up on priority with the Irrigation & Water resources department, Haryana.
- HSIIDC can address the issue of water logging & lack of street lights in the Roz Ka Meo Industrial area on priority.
- Effective grievance redressal mechanism with respect to electricity supply needs to be worked out.

14. POTENTIAL AREAS OF INVESTMENT

- Given a significant number of MSMEs involved in Textile sector in Nuh; and low labor & land costs in the District; there is a significant opportunity for procuring textile products from Nuh for manufacturing of downstream products or marketing /retailing in new markets.
- 'Food Products' sector also has more than 75 units in Nuh, thus offering opportunity for investment towards raw materials supplies to these units.

21. Mahendragarh

District Profile



EXECUTIVE SUMMARY

District Profile

MSME Scenario

21

Mahendragarh

Famous for....

"Rice Production"

1 MSMEs in Mahendragarh

Total number of MSME units **444**

New MSME units (last 3 years) **235**

Food Products

Non-metallic mineral products

Wearing Apparel

Fabricated Metal

Textiles

Top 5 sectors – Maximum number of MSMEs

2 Investment Scenario in Mahendragarh

Total Investment (INR Lakhs) **8,929**

New Investment (last 3 years; INR Lakhs) **3,914**

Food Products

Non-metallic mineral products

Fabricated Metals

Rubber & plastic products

Chemicals & chemical products

Top 5 sectors – Maximum investment by MSMEs

3 Employment Scenario in Mahendragarh

Total Employment **2,457**

New Employment (last 3 years) **1,353**

Food Products

Non-metallic mineral products

Fabricated Metal

Textiles

Rubber & plastic products

Top 5 sectors – Most employment generated

4 Potential for MSMEs

Food products sector offers investment opportunity in advanced food technology facility to enable product diversification and joint sales & marketing for these units

Non-metallic mineral sector offers significant investment potential in downstream value chain activities such as display centers, distribution, retailing, sales etc.

5 Others

Total Exports (FY 18-19; INR Lakhs) **668**

Number of Large & Mega units **0**

Existing Clusters **No clusters currently**

1. INTRODUCTION

The district Mahendragarh was formed in 1948 with parts from Patiala principality, Narnaul and Mahendragarh tehsils, Charkhi Dadri tehsil of Jind principality and some part of the Nizam of Nabha. Naranul is the district headquarter.

The geographical boundaries of Mahendragarh have changed many a times due to reconstruction and formation of new districts.

The district got its name from the fort Mahendragarh, named in honor of Mohinder Singh, son of Maharaja Narendra Singh of Patiala.

1.1 Geography

District Mahendragarh is situated at the extreme south-west end of Haryana. It is surrounded by Bhiwani and Rohtak district in the north. The district shares its border with Rajasthan from three fronts - Alwar district on the east, along with Rewari district; Alwar, Jaipur and Sikar districts on south and Sikarand Jhunjhunu districts on the west.

The district lies in sub-tropical and semi-arid region. Mahendragarh's climate has a strong influence of Rajasthan due to geographical proximity. The climate in Mahendragarh is cool in summers, with strong winds and dusty storms, while the winters are slightly warmer. The district also receives rainfall during February and March apart from the rainy season.

1.2 Demographic Profile

As per the 2011 census, Mahendragarh's total population is 922,088 persons across a geographical area of 1,899 sq. km. Mahendragarh district has a population density of 486 persons per sq. km. The population growth rate for Mahendragarh in the last decade (2001-2011) was 13.48%. Mahendragarh has a moderate literacy rate of 77.72%. The district's sex ratio is lower than the national average of 940, i.e. 895 females per thousand males,but is better than the state average of 877.

1.3 Administrative Set-up

Mahendragarh district has 2 tehsils (Narnaul and Mahendragarh) and 3 sub-tehsils (Nangal Chowdhary, Ateli Nangal and Kanina). There are 8 developmental blocks in Mahendragarh district.

Mahendragarh district constitutes of 4 Vidhan Sabha constituencies: Ateli, Mahendragarh, Narnaul and Nangal Chaudhry.

The Deputy Commissioner is the overall-administrative charge of Mahendragarh district. He is under the administrative control of Commissioner, Gurugram Division, Gurugram.

The following table shows categorization of blocks as per the status of industrial development.

Table 173: **[Mahendragarh]** Categorization of Blocks

Block A	Block B	Block C	Block D
		Narnaul	Ateli Nangal
			Kanina
			Nangal Chaudhary
			Mahendergarh
			Sihma
			Nizampur
			Satnali

2. SECTOR WISE MSME LANDSCAPE

Following table shows the total number of MSME units in each sector, in Mahendragarh, along with the bifurcation of number of micro, small and medium enterprises.

The table also shows number of new units that started their commercial production in the last three financial years.

Table 174: **[Mahendragarh]** No. of MSME Units in each Sector

S. No.	Industry	Total Units	Micro	Small	Medium	FY' 17	FY'18	FY'19	New Units (Last 3 Years)
Metals & Mineral Products									
1	Basic metals	3	3	0	0	2	1	0	3
Food, Beverages & Tobacco									
2	Beverage	6	6	0	0	0	2	1	3
3	Food products	117	93	23	1	17	20	34	71
Pharma, Petro-Chemicals, Rubber products									
4	Chemicals & Chemical Products	11	9	2	0	3	3	1	7
5	Rubber & plastics products	11	8	3	0	3	2	0	5
6	Pharmaceuticals, medicinal chemical & botanical products	6	6	0	0	0	4	1	5
Electrical, Electronics & Machinery									
7	Computer, electronic and optical products	5	5	0	0	1	3	1	5

8	Electrical equipment	8	6	2	0	1	4	1	6
9	Machinery & equipment	6	5	1	0	0	2	2	4
Metals & Mineral Products									
10	Fabricated metal products, except machinery & equipment	23	22	1	0	6	3	0	9
11	Non-metallic mineral products	51	46	5	0	7	6	1	14
Leather, Wood & paper									
12	Furniture	7	6	1	0	3	0	0	3
13	Leather & related products	2	1	1	0	0	2	0	2
14	Paper & paper products	8	8	0	0	1	2	2	5
15	Wood & products of wood and cork, except furniture; Articles of straw and plaiting materials	16	14	2	0	3	2	1	6
Automotive & Auto-Components									
16	Other transport equipment	2	2	0	0	0	1	0	1
Textiles & Apparel									
17	Textiles	19	18	1	0	8	4	0	12
18	Wearing apparel	24	23	1	0	6	2	3	11
Other Manufacturing									
19	Repair, installation of machinery & equipment	17	16	1	0	7	3	0	10
20	Other Manufacturing	102	87	14	1	23	15	15	53

Following scatter diagram shows the comparison between total units in each sector vis-a-vis new units opened in the last 3 financial years.

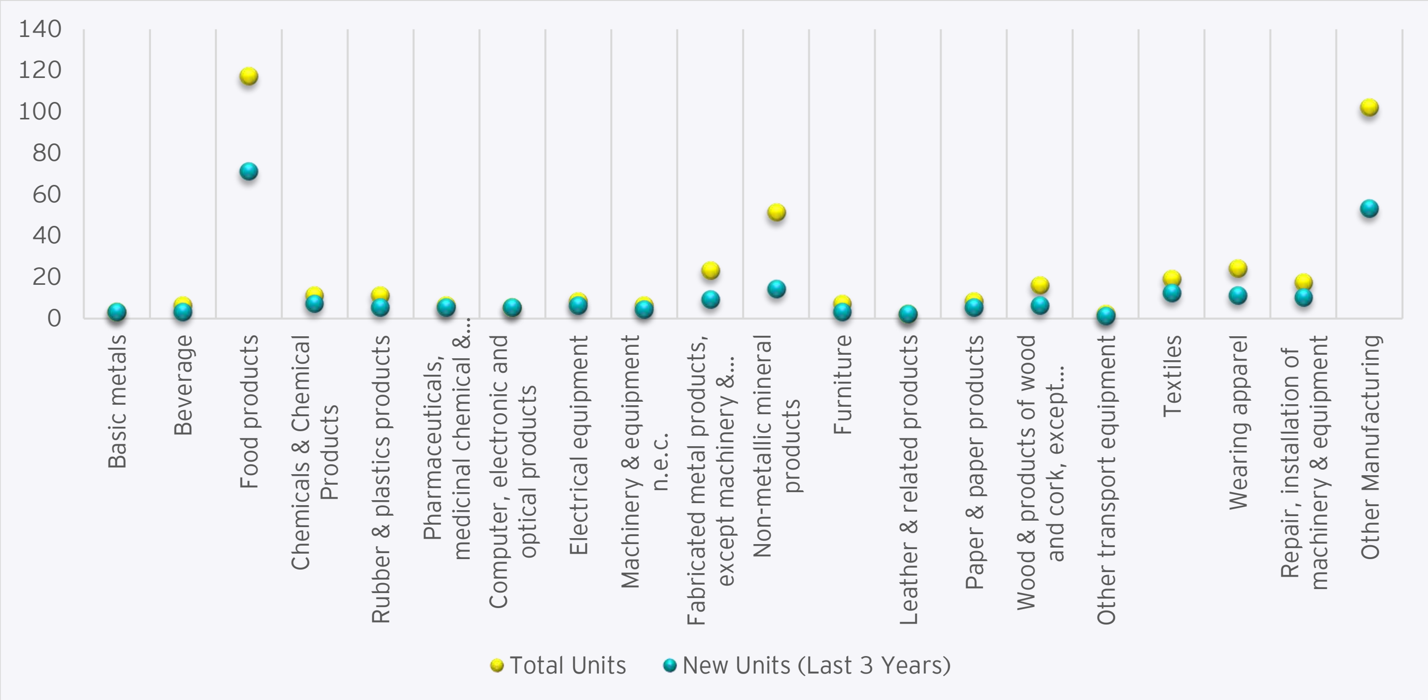


Figure 181: **[Mahendragarh]** Total Units & New Units in each Sector

2.1 Top 10 Sectors: Based on Number of Units

Following table shows top ten sectors in Mahendragarh, based upon the total number of MSME units in the district.

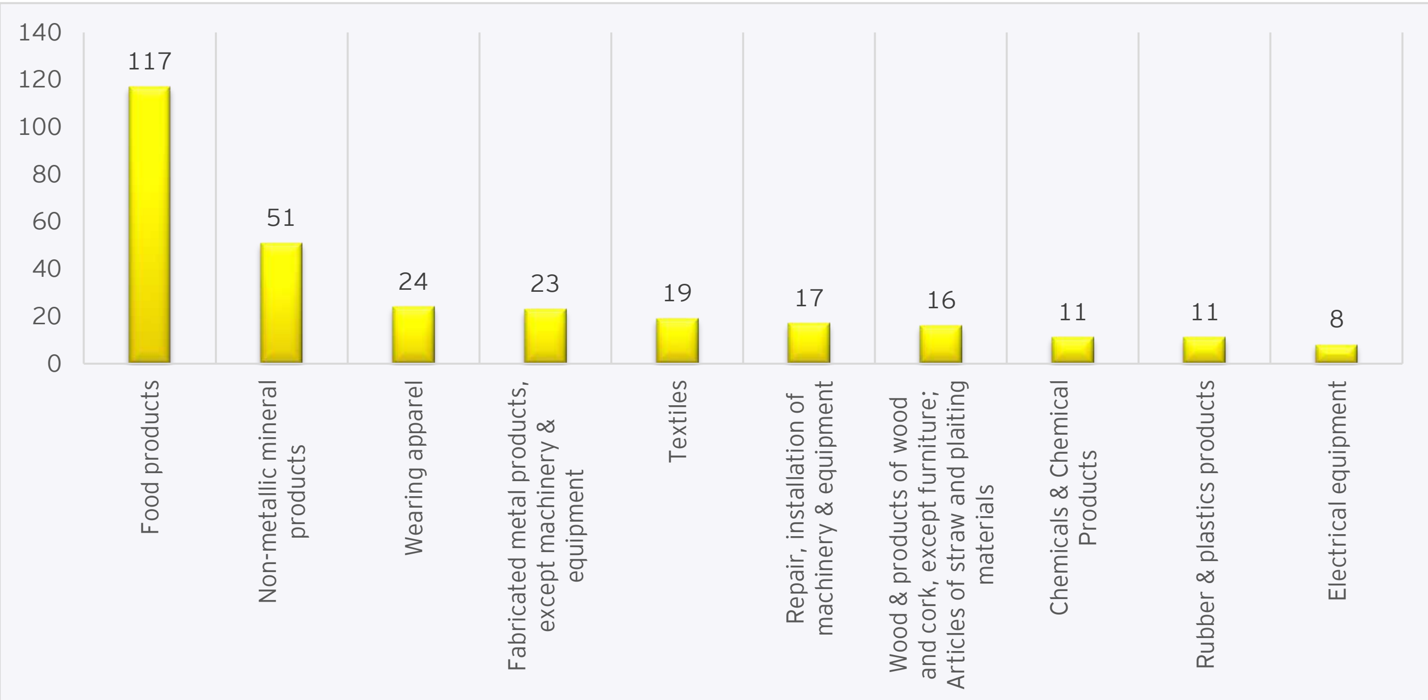


Figure 182: **[Mahendragarh]** Top 10 sectors - Total No. of MSME Units

2.2 Top 10 Sectors: Based on New Units in Last 3 Years

Following table shows the top ten sectors in Mahendragarh, based upon number of new MSME units set-up in the last three years.

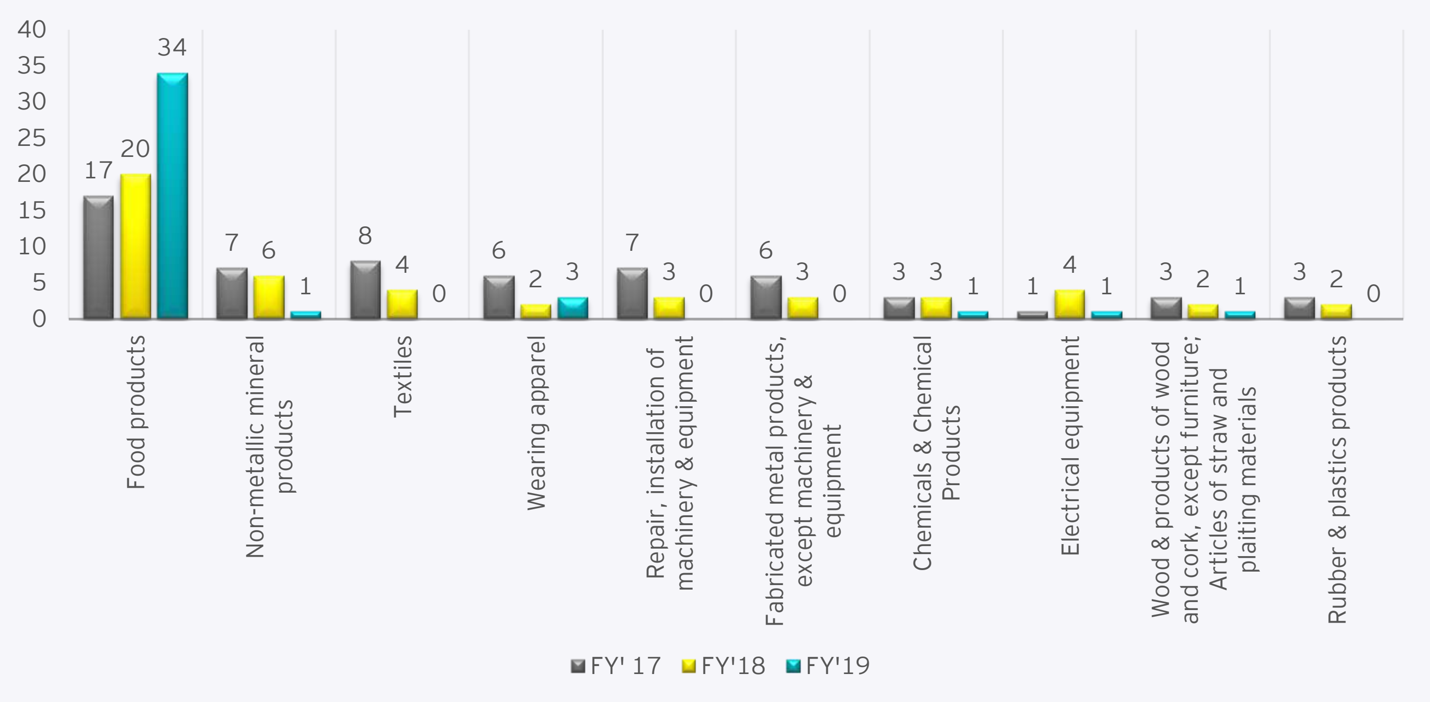


Figure 183: **[Mahendragarh]** Top 10 Sectors - New Units in Last 3 Years

Key Takeaways

- Maximum number of MSME units in Mahendragarh are involved in the food products sector, followed by non-metallic mineral products.

- In the last three years as well, food products sector has seen maximum number of new MSME units opened (71), followed by non-metallic mineral products (14) and textiles (12).

- In terms of the percentage growth, basic metals, computer, electronics & optical products, and leather & related products have had a good traction as 100% of the total MSME units in these industries opened up in the last 3 years.

3. SECTOR WISE INVESTMENT SCENARIO

Punjab National Bank is the convener bank of State Level Bankers' Committee (SLBC) in Haryana and also the district lead bank of Mahendragarh.

Following table shows the total Investment by MSMEs in each sector in Mahendragarh, along with new investment in the last three financial years.

Table 175: **[Mahendragarh]** Total Investment by MSMEs

S. No.	Industry	Investment (INR Lakhs)				
		Total Investment	FY'17	FY'18	FY'19	New Investment (Last 3 Years)
Metals & Mineral Products						
1	Basic metals	13	8	5	0	13
Food, Beverages & Tobacco						
2	Beverage	82	0	22	25	47
3	Food products	3592	397	557	1434	2388
Pharma, Petro-Chemicals, Rubber products						
4	Chemicals & Chemical Products	197	6	9	1	16
5	Rubber & plastics products	230	25	15	0	40
6	Pharmaceuticals, medicinal chemical & botanical products	23	0	19	2	21
Electrical, Electronics & Machinery						
7	Computer, electronic and optical products	15	3	8	4	15
8	Electrical equipment	138	30	72	5	107
9	Machinery & equipment n.e.c.	111	0	31	7	38
Metals & Mineral Products						
10	Fabricated metal products, except machinery & equipment	288	58	24	0	82
11	Non-metallic mineral products	1242	110	82	25	217
Leather, Wood & paper						
12	Furniture	104	36	0	0	36
13	Leather & related products	51	0	51	0	51
14	Paper & paper products	50	10	16	7	33
15	Wood & products of wood and cork, except furniture; Articles of straw and plaiting materials	164	21	12	5	38
Automotive & Auto-Components						
16	Other transport equipment	11	0	10	0	10

Textiles & Apparel						
17	Textiles	146	22	72	0	94
18	Wearing apparel	187	17	2	8	27
Other Manufacturing						
19	Repair, installation of machinery & equipment	79	36	17	0	53
20	Other Manufacturing	2206	271	57	260	588

Following scatter diagram shows a comparison of total MSME investment and new investment in the last 3 financial years, across different sectors of Mahendragarh.

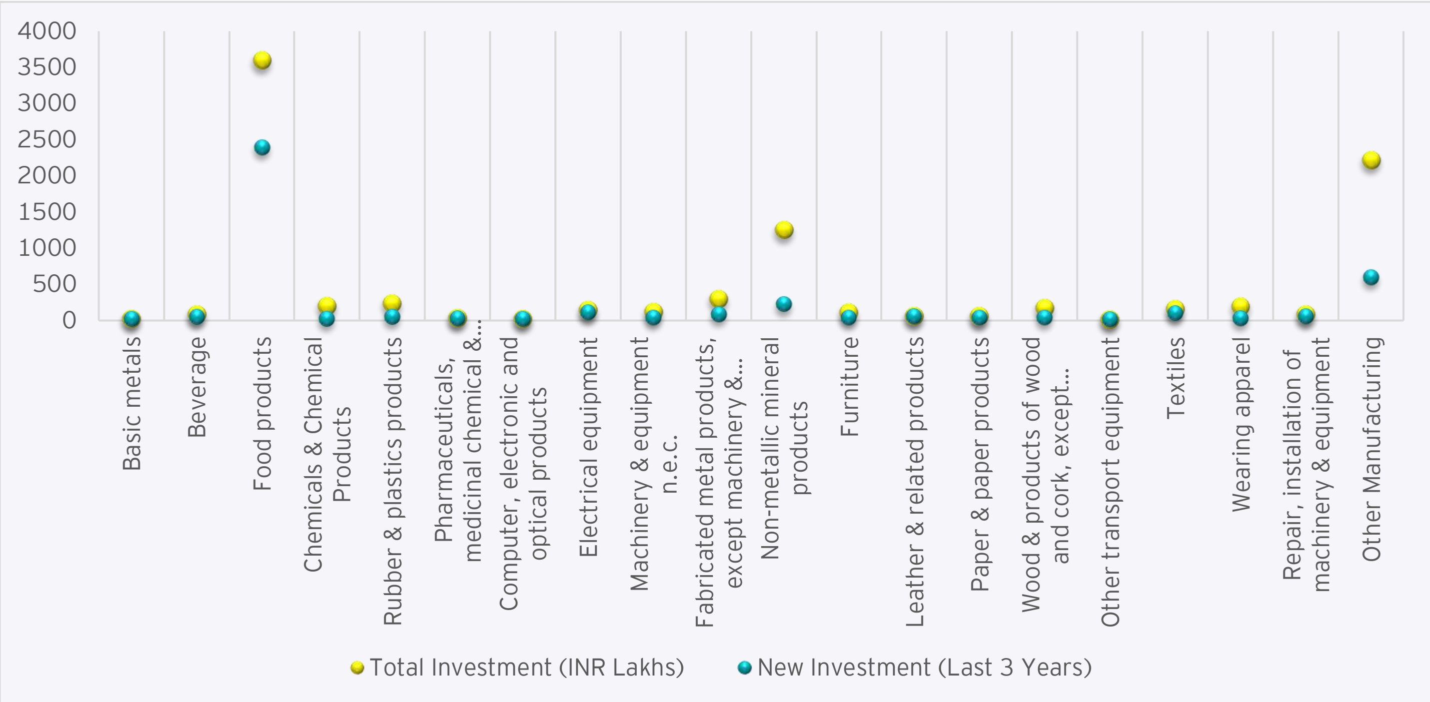


Figure 184: **[Mahendragarh]** Total Investment & New Investment in Last 3 Financial Years (FY'17-FY'19)

Following pie-chart showcases the sectors that have attracted maximum investments in the last 3 financial years (figures are in Lakhs).

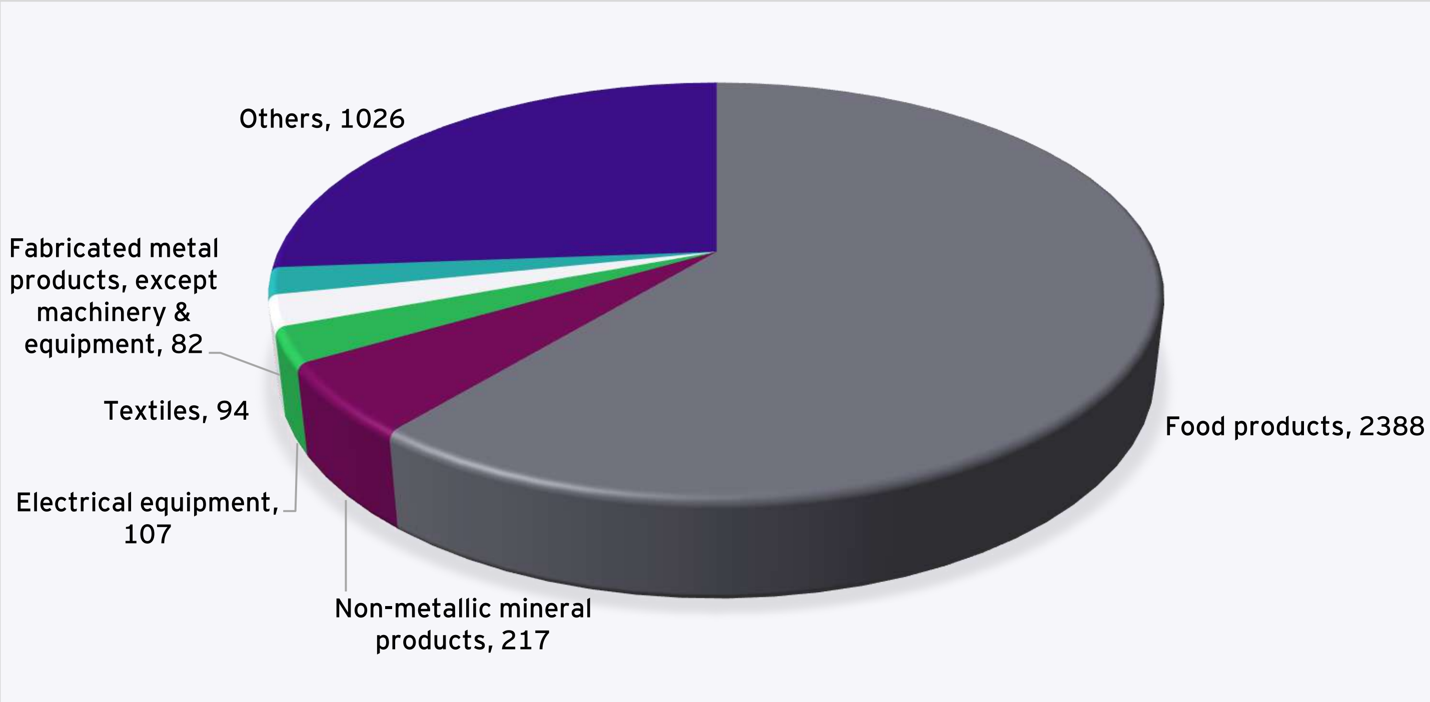


Figure 185: **[Mahendragarh]** Top 5 Sectors with maximum investment in last 3 Financial Years (FY'17-FY'19)

Following diagram shows a comparison of compound annual growth rate of various sectors for last three financial years.

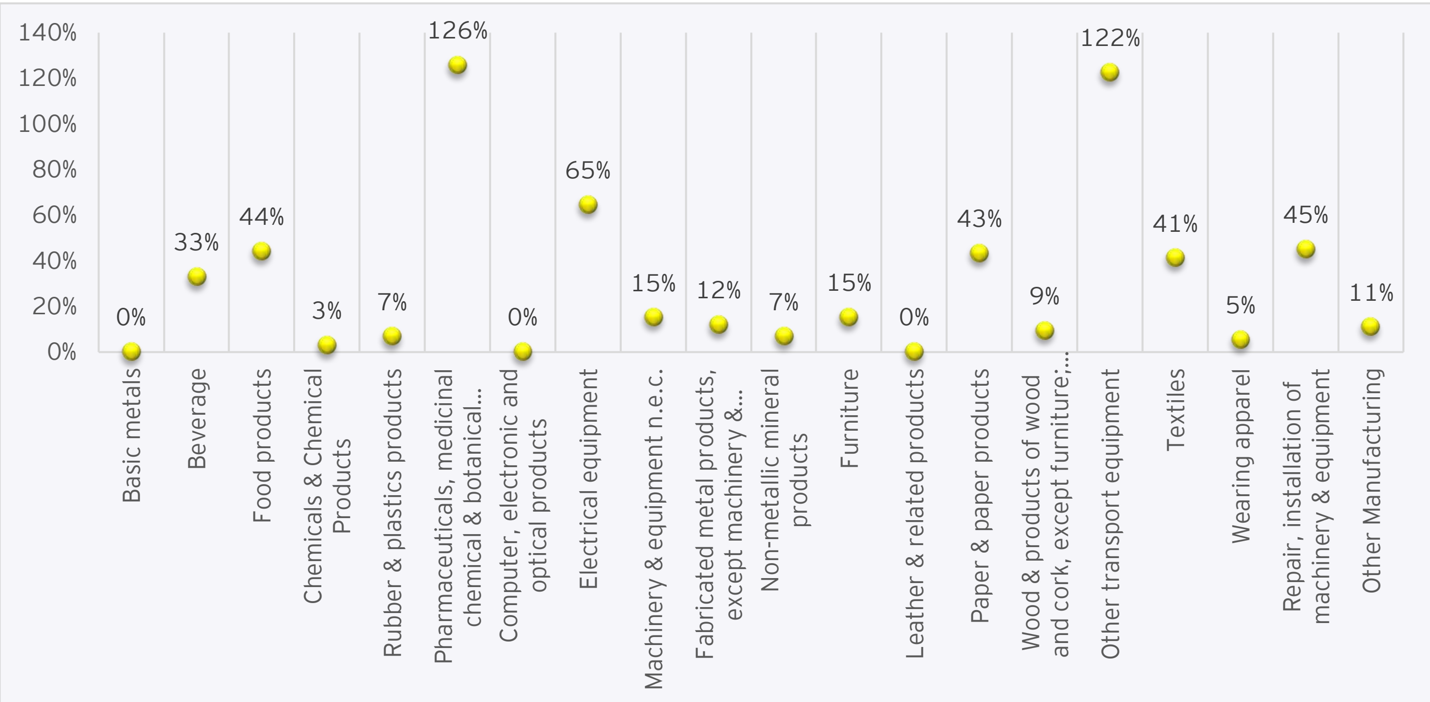


Figure 186: **[Mahendragarh]** CAGR for Last 3 Financial Years (FY'17-FY'19)

Key Takeaways

- Highest amount of investment by MSMEs in Mahendragarh has been in food products sector (INR 35.92 Cr.), followed by non-metallic products sector (INR 12.42 Cr.).
- Besides being the sector with highest total investment food products along with non-metallic mineral products sector also attracted maximum investment in the last three financial years (INR 23.88 Cr. and INR 2.17 Cr. respectively).
- Sectors with high CAGR in MSME investments in the last 3 FYs are: pharmaceuticals, medicinal chemical & botanical products (126%), transport equipment (122%), electrical equipment (65%), repair and installation of machinery and equipment (45%) and food products (44%).

4. SECTOR WISE EMPLOYMENT SCENARIO

Below table showcases the total employment created by MSMEs in each of the sectors, along with new employment created in the last three financial years.

Table 176: **[Mahendragarh]** Total Employment in each Sector

S. No.	Industry	Total employment	FY'17	FY'18	FY'19	New Employment (Last 3 Years)
Metals & Mineral Products						
1	Basic metals	6	4	2	0	6
Food, Beverages & Tobacco						
2	Beverage	23	0	6	6	12
3	Food products	880	101	159	353	613
Pharma, Petro-Chemicals, Rubber products						
4	Chemicals & Chemical Products	53	10	9	1	20
5	Rubber & plastics products	82	27	9	0	36
6	Pharmaceuticals, medicinal chemical & botanical products	17	0	11	2	13
Electrical, Electronics & Machinery						
7	Computer, electronic and optical products	15	7	6	2	15
8	Electrical equipment	41	5	17	1	23
9	Machinery & equipment	27	0	11	5	16
Metals & Mineral Products						

10	Fabricated metal products, except machinery & equipment	125	40	13	0	53
11	Non-metallic mineral products	373	69	49	20	138
Leather, Wood & paper						
12	Furniture	47	19	0	0	19
13	Leather & related products	6	0	6	0	6
14	Paper & paper products	27	5	6	4	15
15	Wood & products of wood and cork, except furniture; Articles of straw and plaiting materials	55	14	7	2	23
Automotive & Auto-Components						
16	Other transport equipment	12	0	10	0	10
Textiles & Apparel						
17	Textiles	86	12	37	0	49
18	Wearing apparel	50	7	2	9	18
Other Manufacturing						
19	Repair, installation of machinery & equipment	44	20	7	0	27
20	Other Manufacturing	488	123	50	68	241

Following scatter diagram shows a comparison of total employment across different MSME sectors and new employment generated in the last 3 financial years.

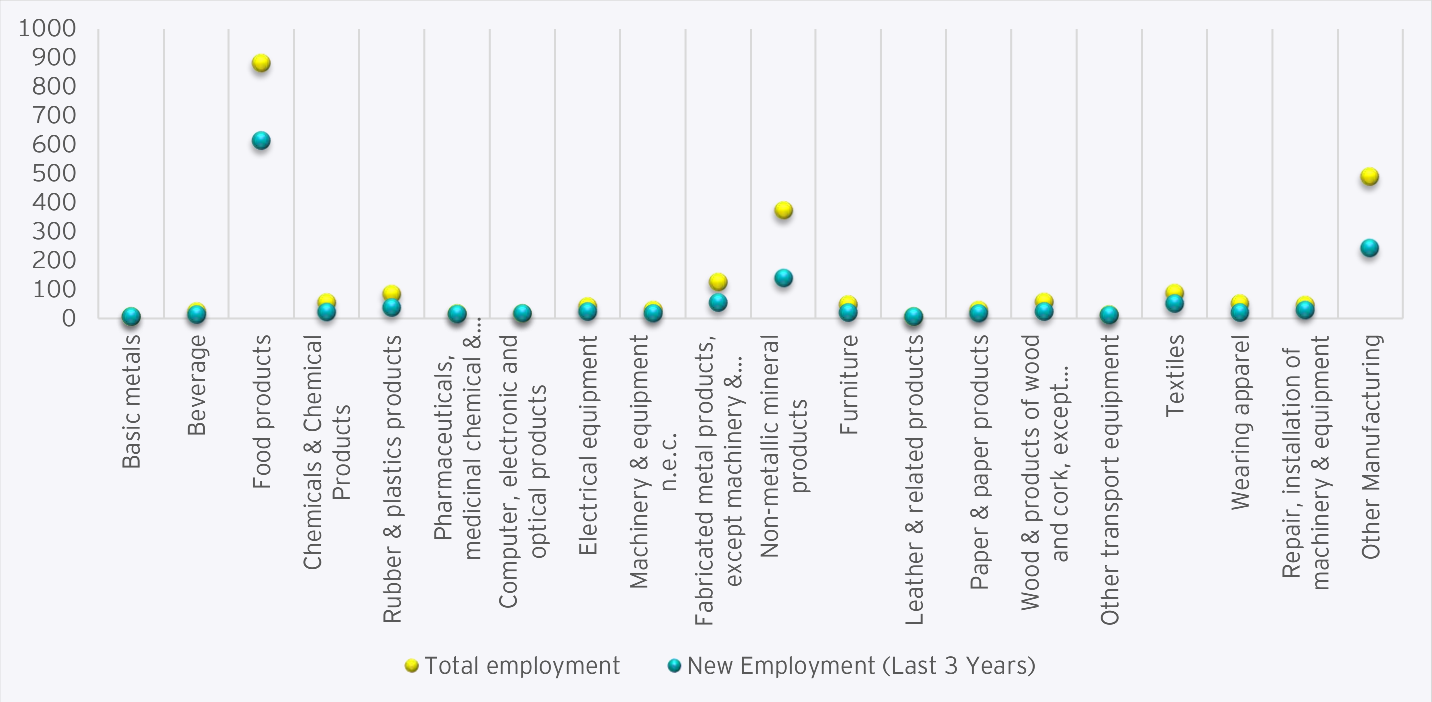


Figure 187: **[Mahendragarh]** Total Employment & New employment in last 3 Financial Years (FY'17-FY'19)

Following bar chart showcases category wise per unit employment analysis for MSMEs in Mahendragarh.

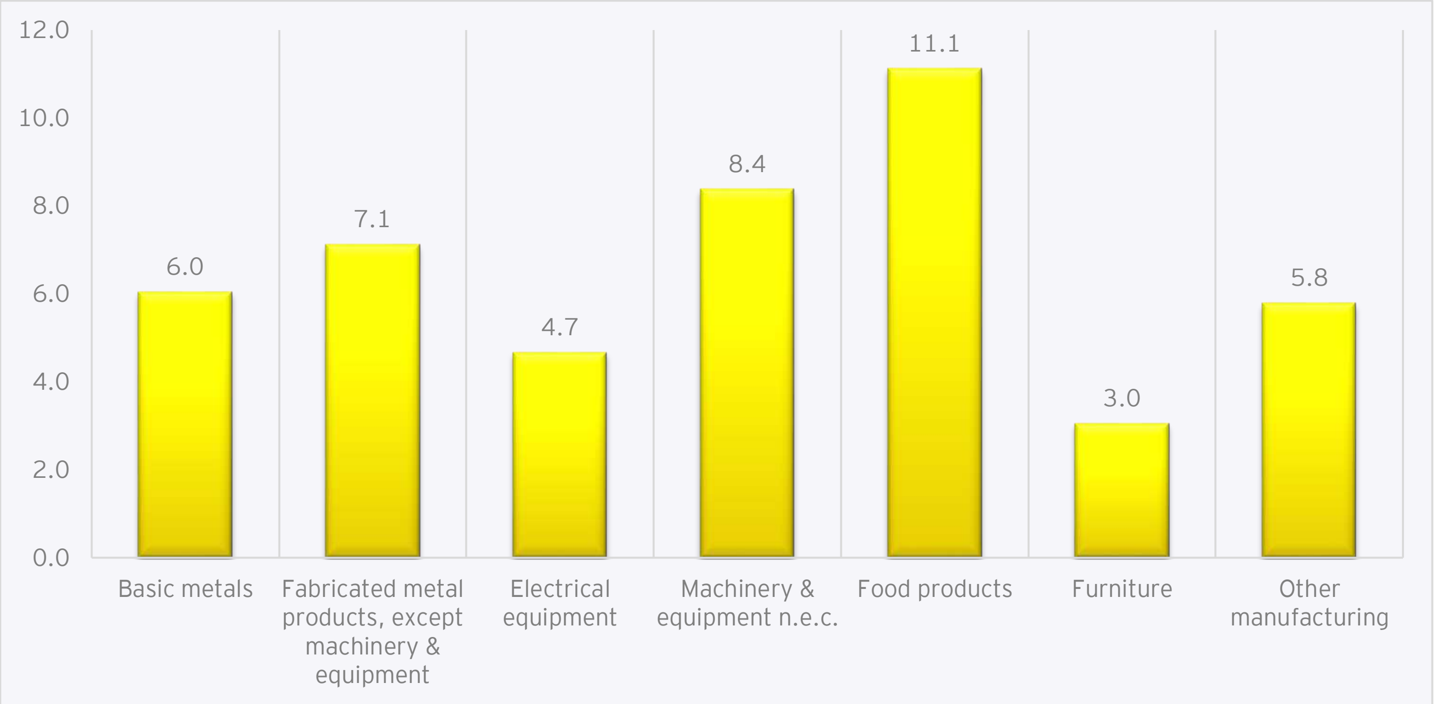


Figure 188: **[Mahendragarh]** Category wise employment intensity

Following pie-charts showcase the sectors that have created maximum employment in each of the last 3 financial years.

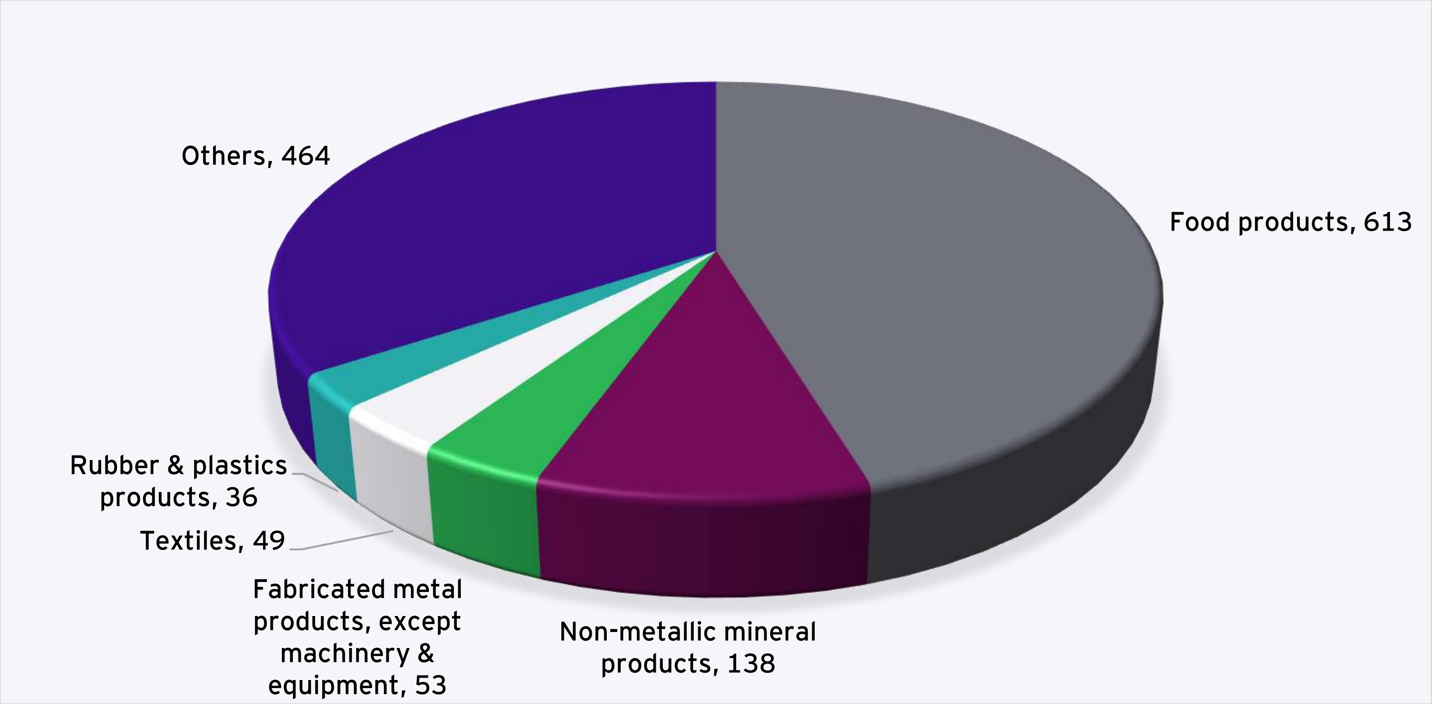


Figure 189: **[Mahendragarh]** Top 5 Sectors with maximum new employment in last 3 Financial Years (FY'17-FY'19)

Key Takeaways

- Food products MSME sector provides the maximum employment (880) followed by non-metallic mineral sector (373) and fabricated metal products sector (125).
- Further, Food products MSME sector has also created the maximum new employment in last 3 years (613), followed by non-metallic mineral products (138) & fabricated metal products (53).
- Food products and rubber & plastic products sectors have maximum employment intensity with an average of 7.5 employees per unit, followed by manufacturers of non-metallic mineral products at 7.3 employees per unit.
- Basic metals sector has the least employment intensity with only 2.0 employees per unit, followed by wearing apparel at 2.1 employees per unit.
- Sectors such as leather and related products and basic metals, have experienced relatively low growth in new employment.

5. EXPORTS FROM THE DISTRICT

Key exports products from Mahendragarh include stone tiles and slabs.

Exports from Mahendragarh reported in the last 3 financial years are: **INR 6,81,08,127** (FY 17), **INR 5,86,25,753** (FY 18) and **INR 6,68,32,398 (FY19)**.

(The export figures above represent only exports related information that is available at the District Industries Centre, Mahendergarh, and actual exports figure might be significantly higher).

6. NATURAL RESOURCES & RAW MATERIAL AVAILABLE

Mahendergarh district is a part of Indo - Gangetic plains and constitutes of vast alluvial and sandy tracts. The district comprises of sand dunes and barren low hills of great Aravalli Range.

There is no perennial river in the district. The main seasonal streams of the district are Dohan and Krishnawati, and flow from south to north.

Some of the prominent minerals found in Mahendragarh district are lime stone, marble, sandstone, iron or silica sand, feldspar quartz, calcite etc.

Xerophytic is the primary flora in the district. Prominent tree species grown are Khairi, Jand, Kikar, Dhok, Babool, Badh, Peepal, Rohera, Janti or Reru, Jal or van, Beri, Lasura, Imli, Barna, Shisham, Siris, Neem, Farash, Henna, Papri, Gular, Indokh, Tut, Kaindu, Bakain, Safeda, Arind, Dhak, etc.

The soils of the district are mostly sandy loam and sandy.

The major kharif crop of Mahendragarh is bajra. The minor ones include cotton and kharif vegetables.

The major rabi crops of Mahendragarh include wheat, gram and mustard oilseeds. Minor ones include rabi vegetables and barley.

Due to limited irrigation facilities dry farming is practiced in the district. The farmers of villages with proximity to urban centers cultivate vegetables like tomato, carrot, cauliflower, ladyfinger, raddish, spinach, methi, etc. throughout the season along with other commercial crops.

7. KEY INDUSTRIAL ESTATES

There are two key industrial areas in district Mahendragarh.

Table 177: Key Industrial Estates in Mahendragarh

S. No.	Name of Industrial Area	Number of Plots/Sheds
1	HSIIDC Industrial Estate, Narnaul	49
2	Rural Industrial Estate, Mahendragarh	9

8. SERVICES SECTOR SNAPSHOT

Below table gives snapshot of the services sector in Mahendragarh:

Table 178: **[Mahendragarh]** Services Sector Snapshot

S. No.	Industry	Total Units	Micro	Small	Medium	Total Investment (INR Lakhs)	Total employment
1	Civil Engineering	4	3	1	0	170	15
2	Accommodation	9	4	5	0	169	49
3	Activities of head offices; management consultancy activities	1	1	0	0	10	2
4	Activities of membership organizations	2	1	1	0	23	35
5	Advertising and market research	8	7	1	0	61	37
6	Architecture and engineering activities; technical testing and analysis	10	7	3	0	89	54
7	Computer programming, consultancy and related activities	66	60	5	1	892	207
8	Creative, arts and entertainment activities	5	3	2	0	37	22
9	Crop and animal production, hunting and	8	8	0	0	24	23

	related service activities						
10	Education	76	72	4	0	461	436
11	Electricity, gas, steam and air conditioning supply	1	1	0	0	3	1
12	Construction of building	9	8	1	0	84	48
13	Employment activities	7	7	0	0	10	44
14	Financial service activities, except insurance and pension funding	11	11	0	0	47	72
15	Food and beverage service activities	62	47	15	0	613	240
16	Gambling and betting activities	10	0	10	0	149	112
17	Human health activities	37	20	17	0	883	1040
18	Information service activities	34	25	9	0	245	155
19	Insurance, reinsurance and pension funding, except compulsory social security	20	18	2	0	82	54
20	Land transport and transport via pipelines	51	24	27	0	799	228
21	Legal and accounting activities	11	11	0	0	42	28

22	Libraries, archives, museums and other cultural activities	2	2	0	0	4	5
23	Motion picture, video and television programme production, sound recording and music publishing activities	8	6	2	0	113	36
24	Office administrative, office support and other business support activities	18	12	6	0	302	52
25	Other financial activities	11	7	4	0	100	50

9. CLUSTERS SCENARIO

There are no clusters in Mahendragarh currently. However, given the large presence of Food products and Non-metallic mineral products MSME units in Mahendragarh district, new clusters can be formed within these industries.

10. INDUSTRY ASSOCIATIONS

There are four Industrial Associations in Mahendragarh.

Table 179: Industry Associations in Mahendragarh

S. No.	Name of Association	Name of President	Address	Contact
1	Industrial Estate Association	Sh. Nemi Chand Aggarwal	Nizampur Road, Indl.Estate, Narnaul	01282-251223; 9416372715
2	The Narnaul Industrial Association	Sh. Anil Kumar Aggarwal	M/S Soni Mineral Grinding Kultazpur Road,Narnaul	9416065501
3	Zila Minerals UdyogSangh	Sh. Ved Parkash Yadav	Village, Bayal, Narnaul	9416065770
4	Dakshin Haryana Industrial Association	Dr. Mandeep Lamba		9414248405

11. KEY ISSUES OF THE INDUSTRIES

Some of the key issues impacting industries in Mahendragarh are:

- There are many stone crushing units in Narnaul leading to presence of dust particles in the air causing pollution. Residents in the vicinity of these crusher zones are increasing facing respiratory distress. Provisions should be made to relocate the stone crushing units or reducing the air pollution caused by these units.

- Other problems faced by the industries in the district are pertaining to:

    - Unstable electricity connection and higher electricity rates
    - Lack of water and sewerage system
    - Lack of infrastructure
    - Lack of waste disposal system

12. POTENTIAL AREAS OF INTERVENTION

- State govt. can identify separate areas for polluting Industries in the district that are far off from the residential areas.
- Effective online grievance redressal mechanism needs to be ensured to handle electricity/ water/ Infrastructure related issues.

13. POTENTIAL AREAS OF INVESTMENT

- Food Products is one of the key sectors in Mahendragarh district with 117 units currently operational. It's also a fast-growing sector as 71 of these units have started operations in last 3 years. Sector offers significant investment opportunity in advanced food technology facility to enable product diversification and joint sales & marketing for these units such as common display center, business development support etc.
- Non-metallic mineral products is another significant sector in the district with 51 units currently operational. Sector offers significant investment potential in downstream value chain activities such as display centers, distribution, retailing, sales etc.

Our offices

Ahmedabad
2nd floor, Shivalik Ishaan
Near C.N. Vidhyalaya
Ambawadi
Ahmedabad - 380 015
Tel: + 91 79 6608 3800

Bengaluru
6th, 12th & 13th floor
"UB City", Canberra Block
No.24 Vittal Mallya Road
Bengaluru - 560 001
Tel: + 91 80 4027 5000
+ 91 80 6727 5000
+ 91 80 2224 0696

Ground Floor, 'A' wing
Divyasree Chambers
11, O'Shaughnessy Road
Langford Gardens
Bengaluru - 560 025
Tel: + 91 80 6727 5000

Chandigarh
1st Floor, SCO: 166-167
Sector 9-C, Madhya Marg
Chandigarh - 160 009
Tel: + 91 172 331 7800

Chennai
Tidel Park, 6th & 7th Floor
A Block, No.4, Rajiv Gandhi Salai
Taramani, Chennai - 600 113
Tel: + 91 44 6654 8100

Delhi NCR
Golf View Corporate Tower B
Sector 42, Sector Road
Gurgaon - 122 002
Tel: + 91 124 443 4000

3rd & 6th Floor, Worldmark-1
IGI Airport Hospitality District
Aerocity, New Delhi - 110 037
Tel: + 91 11 4731 8000

4th & 5th Floor, Plot No 2B
Tower 2, Sector 126
NOIDA - 201 304
Gautam Budh Nagar, U.P.
Tel: + 91 120 671 7000

Hyderabad
Oval Office, 18, iLabs Centre
Hitech City, Madhapur
Hyderabad - 500 081
Tel: + 91 40 6736 2000

Jamshedpur
1st Floor, Shantiniketan Building
Holding No. 1, SB Shop Area
Bistupur, Jamshedpur – 831 001
Tel: + 91 657 663 1000

Kochi
9th Floor, ABAD Nucleus
NH-49, Maradu PO
Kochi - 682 304
Tel: + 91 484 304 4000

Kolkata
22 Camac Street
3rd Floor, Block 'C'
Kolkata - 700 016
Tel: + 91 33 6615 3400

Mumbai
14th Floor, The Ruby
29 Senapati Bapat Marg
Dadar (W), Mumbai - 400 028
Tel: + 91 22 6192 0000

5th Floor, Block B-2
Nirlon Knowledge Park
Off. Western Express Highway
Goregaon (E)
Mumbai - 400 063
Tel: + 91 22 6192 0000

Pune
C-401, 4th floor
Panchshil Tech Park
Yerwada
(Near Don Bosco School)
Pune - 411 006
Tel: + 91 20 4912 6000

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