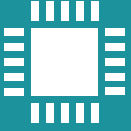
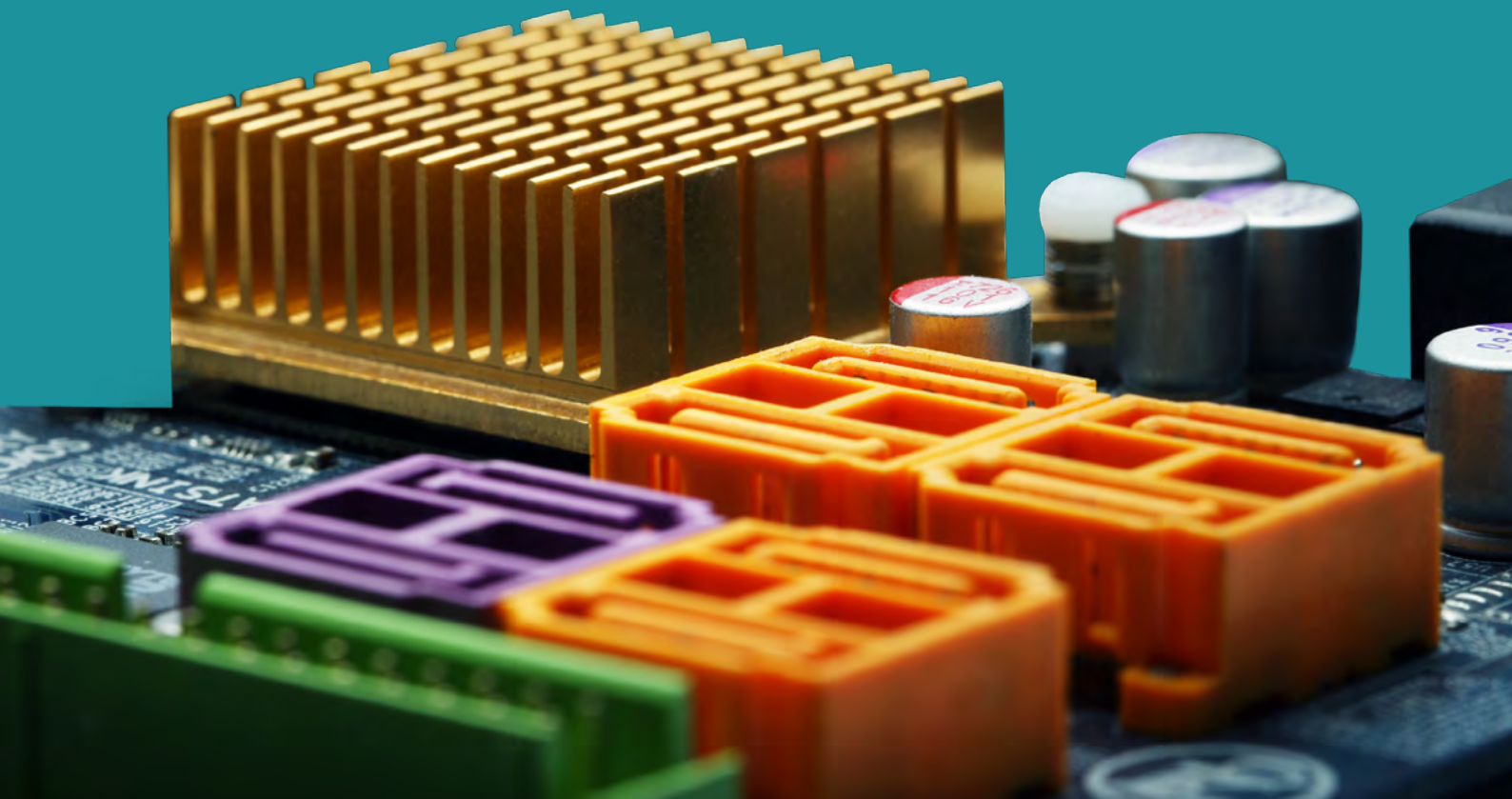




INVEST INDIA



ELECTRONIC SYSTEM DESIGN & MANUFACTURING



SECTOR HIGHLIGHTS

Over **2x** Growth in production from USD 49 Bn to USD 115 Bn between FY17 to FY24

India's share in global electronics manufacturing has grown from 1.3% in FY13

to **3.8%** in FY22

India has become the **2nd** largest mobile handset manufacturing nation and the **2nd** largest smart phone market in the world

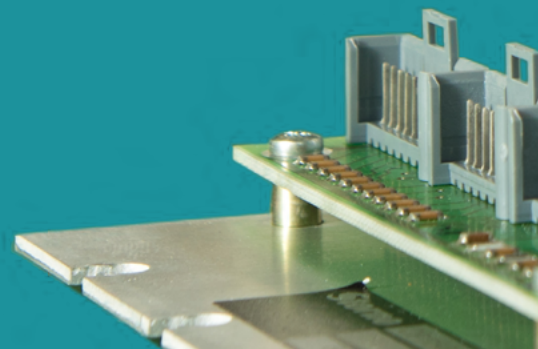
950 million Internet subscribers in FY24

3x growth in exports from USD 11.6 Bn in FY 21 to USD 35 Bn in FY24

USD 30 Bn in fiscal support earmarked for Electronics & Allied Sectors

100% FDI allowed through automatic route

20% CAGR in average monthly data traffic per user from 9.5 GB in FY18 to 24 Gb in FY23



GROWTH DRIVERS

01 USD 169 Bn Electronics market

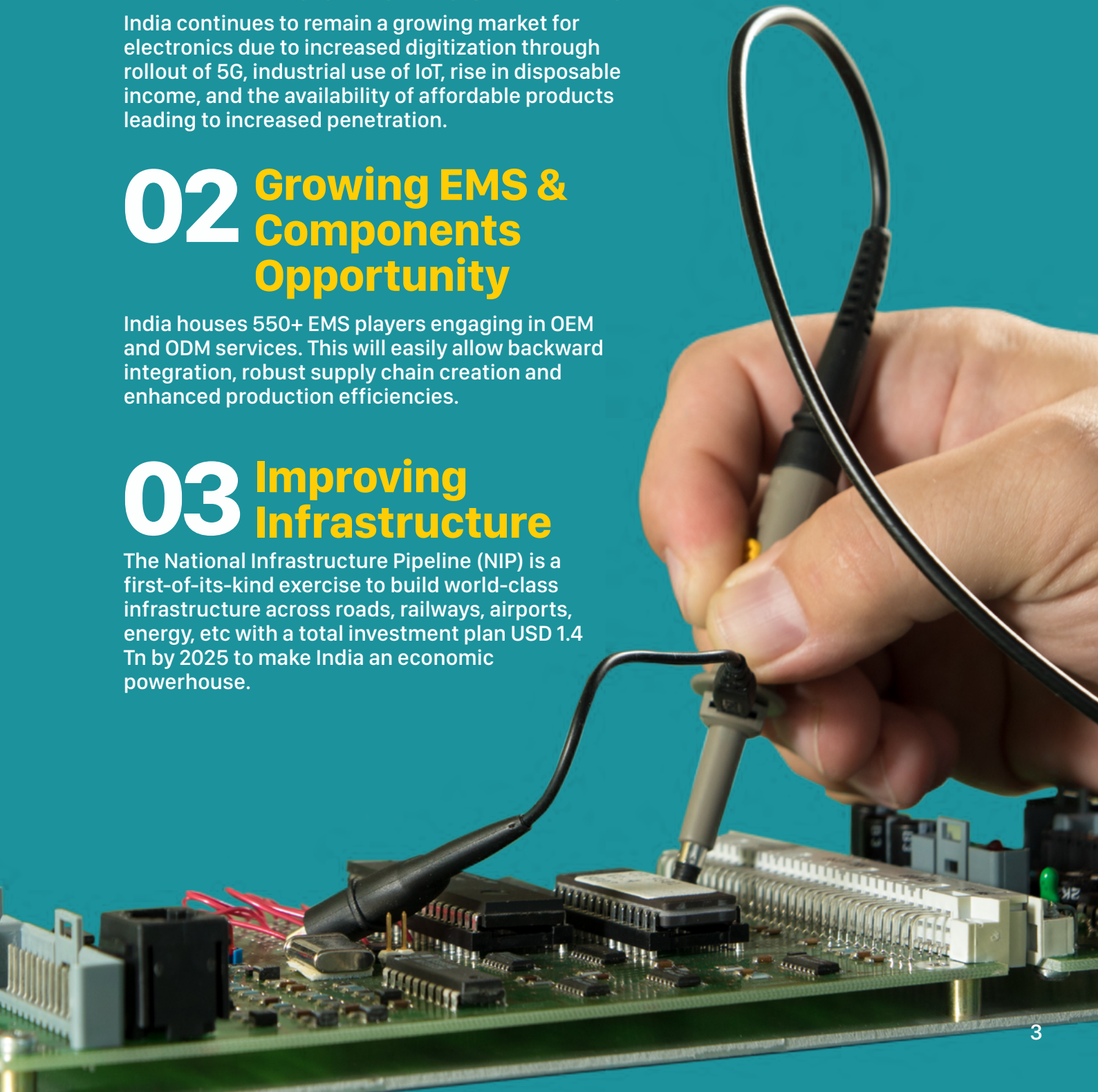
India continues to remain a growing market for electronics due to increased digitization through rollout of 5G, industrial use of IoT, rise in disposable income, and the availability of affordable products leading to increased penetration.

02 Growing EMS & Components Opportunity

India houses 550+ EMS players engaging in OEM and ODM services. This will easily allow backward integration, robust supply chain creation and enhanced production efficiencies.

03 Improving Infrastructure

The National Infrastructure Pipeline (NIP) is a first-of-its-kind exercise to build world-class infrastructure across roads, railways, airports, energy, etc with a total investment plan USD 1.4 Tn by 2025 to make India an economic powerhouse.



GOVERNMENT INITIATIVES

1 Semicon India Program

- | The Semicon India Program, with an incentive outlay of USD 10 Bn, was launched to develop a sustainable semiconductor and display ecosystem in the country. This program will establish India as a global hub for electronics manufacturing, promote self-reliance and strengthen resilience in global supply chains

2 Production Linked Incentives (PLI)

- | PLI Schemes were launched for Large Scale Electronics Manufacturing and IT Hardware with a total incentive outlay of USD 8 Bn. The scheme offers companies incentives on products manufactured in India basis incremental sales & investments. The target segment includes Laptops, Tablets, All-in-One PCs, Servers, Ultra Small Form Factor (USFF)



3 Scheme for Promotion of Manufacturing of Electronic Components and Semiconductors (SPECS)

- Provides 25% capital subsidy on Capital Expenditure pertaining to plant, machinery, equipment, and associated utilities, including R&D

4 Electronics Manufacturing Clusters (EMC) 2.0

- EMC 2.0 Scheme seeks to strengthen India's infrastructure base with the development of industry-specific facilities like Common Facility Centers, Ready Built Factory, and Plug & Play facilities

KEY STAKEHOLDERS

GOVERNMENT OF INDIA

- Ministry of Electronics and Information Technology
- Department for Promotion of Industry and Internal Trade
- India Semiconductor Mission (ISM)

INDUSTRY ASSOCIATIONS

- Electronics Industries Association of India (ELCINA)
- India Cellular and Electronics Association (ICEA)
- Indian Electronics and Semiconductor Association (IESA)
- Manufacturers' Association for Information Technology (MAIT)

INDUSTRY CLUSTERS/ZONES

GROWING MANUFACTURING & DESIGN ECOSYSTEM



- **Adhra Pradesh: Sri City, Kadapa:** Foxconn, NeoLync, TCL, PSA, Dixon
- **Maharashtra: Pune:** LG, Belden, Haier, Jabil, Bosch
- **Hyderabad:** Microsoft, Google, Micron, Amazon
- **Uttar Pradesh: Noida & Greater Noida:** Oppo, Vivo, Dixon, Samsung, LG, Lava
- **Tamil Nadu: Sriperumbudur:** Flex, Samsung, Dell, Tata, Foxconn, Pegatron
- **Haryana: Gurgaon, Manesar:** Delta, Panasonic, Midea, TDK
- **Karnataka: Bangalore, Mysore:** AMD, Wistron, Broadcom, NVIDIA, Qualcomm, Samsung, AT&S, Apple, Intel
- **Gujarat: Dholera/ Sanand:** TATA, PSMC, Micron, Renesas, CG Power and Industrial Solutions, Stars Manufacturing

KEY PLAYERS IN INDIA



AMD



Dixon®
The brand behind brands

FOXCONN®



Micron®

PEGATRON

Qualcomm

SAMSUNG



JABIL



AT&S

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To find out more
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