J&K at a Glance

1st in production of apple, walnut, almond in India
1st in production of saffron in India
2nd in production of wool in India

57 Industrial Estates

3 Perennial Rivers

2 Airports

3 Agro-climatic Zones
J&K at a Glance

54.5% contribution of Services towards GSDP

- Hospitality & Tourism
- Transport & Communication
- Financial Services & Real Estate

28% contribution of Manufacturing towards GSDP

- Manufacturing
- Mining & Quarrying
- Construction & Utilities

17.5% contribution of Agriculture towards GSDP

- Crops & Livestock
- Forestry & Logging
- Fishing & Aquaculture
- Horticulture, Sericulture & Floriculture

66% of the population between working age of 15-59 years

6000+ Acres of Industrial Land Bank

Vibrant Tourism Ecosystem

Investor Friendly Policies with Focus on Ease of Doing Business

Lowest industrial power tariff regime
Focus Sectors

Policy Framework and enabling investment climate
Focus Sectors

14 Focus Sectors displaying Strengths and Aspirations of J&K

- Tourism & Hospitality
- Film
- Horticulture & Post Harvest Management
- Agro & Food Processing
- Milk, Poultry, Fisheries & Wool Production
- Agriculture & Mulberry Production for Silk
- Herbal & Medicinal Plants
- Health & Pharmaceutical Manufacturing
- IT & ITES
- Renewable Energy
- Infrastructure & Real Estate
- Handloom & Handicraft
- Education & Skill Development
**Focus Sector**
Tourism & Hospitality

---

### Key Sectoral Highlights
- One of the North India’s most visited tourist destination
- State home to Himalayas, Lakes, Wetlands & Meadows
- Gulmarg Ski Resort and Patni Top Gondola ride
- World renowned spiritual destinations such as Maa Vaishno Devi, Amarnath, Hazratbal

### Current Scenario

<table>
<thead>
<tr>
<th>Visitors</th>
<th>Domestic</th>
<th>International</th>
</tr>
</thead>
<tbody>
<tr>
<td>(in 2017)</td>
<td>14.2 mn.</td>
<td>0.8 mn.</td>
</tr>
</tbody>
</table>

### Opportunities

-Vast Potential to cater to diverse group of Tourists

- Unexplored Destinations
- Hotels & Resorts
- Spiritual Tourism
- Wellness Tourism
- Ropeways
- Theme Parks
- Adventure Tourism
Focus Sector
Film Tourism

Key Sectoral Highlights
- Haider, Fanaa, Bajrangi Bhaijan shot in J&K
- Countless scenic locations for film shooting – Valleys, Peaks, Heritage sites, waterfalls
- Single window clearances for film shooting

Current Scenario
Scenic Locations
- Gulmarg,
- Betab Valley,
- Dal lake

~20 Films shot per year
30+ Cine Screens

Opportunities
Reviving Bollywood’s favourite film shooting destination

Film Studios
Film cities
Film Institutes
Multiplexes
Focus Sector
Agriculture, Horticulture, Floriculture & Food Processing

Key Sectoral Highlights
- Largest producer of Apple, Walnut, Cherry and Almond in India
- 3 agro-climatic zones enable cultivation of unique produce like Saffron, Berries, Figs and Special variety of Basmati rice
- Conducive climate for rich floriculture

Current Scenario (2019-20)

19.80 Lakh MT Apples
2.7 Lakh MT Walnuts
7.4 MT Saffron
0.15 Lakh MT Cherry

16 Food Processing Units
11 Walnut Processing Units
1.16 Lakh MT CA Storage available
~5000 Acre Area under Organic Farming
4 Food Parks
Focus Sector
Agriculture, Horticulture, Floriculture & Food Processing

Opportunities

1% 25% 35MT 4 lakh MT
Apples processed currently Walnut processed currently Total demand of Saffron in India Total demand for CA storage

J&K high density plantation of Apples to double the production

Potential to be major food processing hub

Processing Units Cold Chain & CA storage facilities Integrated Packaging Houses Centre of Excellence (CoE) Implementation of Agri-Tech Solutions
**Focus Sector**

**Milk, Fish, Poultry & Wool Production**

---

**Key Sectoral Highlights**

- 2nd largest producer of wool with production of 7,218 MT
- Over 10% average growth in production of milk during the past 5 years
- Largest Trout fish producer with 600 MT production

**Current Scenario**

- 84% Population consumes meat/egg
- 92 lakh broiler chicken imported
- 95 crore eggs imported
- 3,000+ Tonnes of wool unprocessed in 2018

**Opportunities**

- Huge captive demand for animal products
  - Fish and Poultry farms
  - Egg and Meat Processing Plants
  - Wool Processing Plants
  - Cold Chain
Focus Sector
Sericulture

Key Sectoral Highlights
- One of the finest quality silk producer worldwide
- One of the oldest traditional cottage industry in J&K

Current Scenario

30,894 Families Involved
173 Mulberry Nurseries
20 Cr. Annual Income
1,035 MT Cocoons Produced

Opportunities

- Very low level of value addition due to lack of adequate reeling units
- More than 70% of the raw cocoon is exported outside the UT.

Immense potential of moving up in the value chain

- Integrated Rearing, Reeling & Weaving Unit
- Cold storage for Cocoon Preservation
- Cocoon Reeling Units
- Filature Units
Focus Sector
Herbal and Medicinal Plants

Key Sectoral Highlights

- Diverse Agro-Geo climate for high altitude medicinal plants
- More than 300 medicinal plant species found

Current Scenario

6 Herbal Gardens
617 Ayurvedic and Unani Units

Opportunities

- Ever increasing awareness about benefits of Ayurvedic treatment
- J&K has a distinct positioning of pristine natural resources

Unexplored treasure of Ayurveda

- Mandi of Medicinal Plants on PPP Mode
- Specialized AYUSH Wellness centres
- Cluster mode cultivation of Medicinal and herbal plants
- Processing units
**Key Sectoral Highlights**
- Ranked 7th in India Health Index in 2016-17 & 2017-18
- Presence of Pharma clusters in Samba and Bari Brahmana

**Current Scenario**
- 50+ Pharmaceutical companies
- 85% of healthcare under Government

**Opportunities**
- provision of high quality Health and Medical facilities
Key Sectoral Highlights

- Ample availability of mineral and agriculture raw material
- Mineral rich land – Limestone, Gypsum, Quartzite, Dolomite, Bauxite
- Flourishing industrial ecosystem in 57 industrial estates

Current Scenario

60+ Large units
25,000+ MSME units
1 Textile Park in Kathua

Opportunities

Untapped potential in Manufacturing and Mining

Textile Park
Light Engineering
High Precision Engineering Equipment
Willow bat manufacturing
Mining
Focus Sector
Information Technology

Key Sectoral Highlights
- 5.81 mn Internet Subscribers and over 10 mn. Mobile users
- Tech Savvy population with Salubrious climate suitable for IT industries,
  Good quality of life

Current Scenario
2,400+ functional CSCs
50+ IT & BPO Units
20,000+ People employed

Opportunities
High quality, Tech-Savvy Human Resource
- BPO in 20 districts
- 2 IT Parks in Jammu and Srinagar
- Innovation and Incubation Hubs
- Software Technology Parks
**Key Sectoral Highlights**
- J&K accounts for 10.25% of India’s total hydel power production
- Three perennial river basins – Chenab, Jhelum & Ravi

**Current Scenario**
- **14,867 MW** Hydro Energy Potential
- **23%** Hydro Energy Harnessed
- **~5** Global Horizontal Irradiance (kwh/m2/ day)

**Opportunities**
- Untapped potential to harness remaining 77% of Hydro Energy
- Small Hydro Power projects
- Hydro Power plants
- 3 solar plants identified (20 MW)
- Energy Storage
Focus Sector
Infrastructure and Real Estate

Key Sectoral Highlights

- Airport expansion in Jammu and Srinagar, and ICD in Samba
- 356 km rail link from Jammu to Baramulla by 2022
- Upcoming projects – Ring road, Metro, Lake and River front development

Current Targets

1 Lakh+ Houses by 2022
4000 kms Road Network by 2022
48 kms Metro Network by 2025
11 Proposed Small Airports
4 Himalayan Tourist circuits

Opportunities

Massive investment in infrastructure is on the anvil

- Airports
- Roads and Highways
- Metro Projects
- Urban Mobility
- Housing
- Waterfront beautification
Focus Sector
Handloom and Handicraft

Key Sectoral Highlights
- Pashmina, Kani and Raffle shawls, Tweed Fabrics
- Major handicraft items include Carpets, Papier Machie, Crewel, Chain Stitch

Current Scenario

<table>
<thead>
<tr>
<th></th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Weavers employed</td>
<td>43,000</td>
</tr>
<tr>
<td>Handloom exports</td>
<td>1000+ Cr.</td>
</tr>
<tr>
<td>Artisans employed</td>
<td>3.5 Lakh</td>
</tr>
<tr>
<td>Handicraft exports</td>
<td>4000+ Cr.</td>
</tr>
</tbody>
</table>

Opportunities

Impetus to age old tradition

Craft city  Craft Parks  Urban Haats  Common Facility Centres
Focus Sector
Education and Skill Development

Key Sectoral Highlights
- Home to Institutions of National importance- IIT, IIM, IIMC, NIT etc.
- Incremental demand for about 6.39 lakhs skilled resources in different sectors of Jammu and Kashmir. (NSDC)

Current Scenario
31% Gross Enrolment Ratio in Higher Education
139 ITI's & Polytechnic Colleges
12 Universities

Opportunities
- Opportunities for Residential Schools & Technical Institutes
- Smart Schools
- Education Infrastructure in PPP mode
- Collaboration with Foreign Universities
- Industry Academia partnership
Policy Framework and enabling investment climate
Why Jammu and Kashmir

- Progressive, competitive and investor friendly policies
- Easy to do Business and conducive working environment
- Skilled Labour – Institutes of national repute ensuring high quality human resources
- Industrial and sector specific Land Bank available
- Competitive cost of doing business
- Robust Infrastructure – Well connected through air, rail & road
- Pristine and pollution free environment
- Large captive market, Easy access to consumers of neighbouring states
- Competitive cost of doing business
- Large captive market, Easy access to consumers of neighbouring states
<table>
<thead>
<tr>
<th>Policy Initiatives</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Progressive Policies Enabling Conducive Business Environment</strong></td>
</tr>
<tr>
<td>1. J&amp;K Industrial Promotion Policy 2020</td>
</tr>
<tr>
<td>1a. J&amp;K Industrial Policy 2020 (for MSME units)</td>
</tr>
<tr>
<td>1b. J&amp;K Industrial Policy 2020 (for Large &amp; Mega units)</td>
</tr>
<tr>
<td>2. J&amp;K Pharmaceutical Policy 2020</td>
</tr>
<tr>
<td>3. Healthcare and AYUSH Care Investment Policy 2020</td>
</tr>
<tr>
<td>4. J&amp;K Tourism Policy 2020</td>
</tr>
<tr>
<td>5. J&amp;K Agriculture, Horticulture &amp; Food Processing Policy 2020</td>
</tr>
<tr>
<td>6. J&amp;K Policy for Sericulture Development for Bivoltine Silk 2020</td>
</tr>
<tr>
<td>7. J&amp;K Film Policy 2020</td>
</tr>
<tr>
<td>8. J&amp;K Education Investment Policy</td>
</tr>
</tbody>
</table>
Industrial Policy Highlights

Policies in line with Intrinsic strengths of J&K

- Barrier Free Movement
- Attractive Tax Exemptions
- Green Industrialization
- Assistance in Capital Investment
- Suitable Land at Concessional Rates
- Freight Assistance
- Progressive Labour Reforms
- Customised package for Mega Projects
- Stamp Duty Exemption
Ease of Doing Business
Creating conducive environment for business

- Robust Single Window Clearance System. Ranked No. 1 in EoDB amongst UT’s
- Implemented 80% Reforms across all departments.
- Aim to achieve 100% compliance in upcoming assessment year

**REFORM IMPLEMENTATION (%)**

- BRAP-2015: 5.93%
- BRAP-2016: 0.30%
- BRAP 2017-18: 32.40%
- BRAP-2019: 79.60%

Mandated submission of applications in “Online Mode” only.

Integrated system for clearances coming up under one roof

Transparent Procedures & Checklist

Investor Facilitation Cell (JKTPO)
Prime Minister’s Development Package – An Overview

54 Projects worth Rs. 58,500+ cr. announced under the scheme

- 39 Projects ongoing/ in pipeline
- Semi Ring Road project in Jammu and Srinagar
- Jammu-Akhnoor-Poonch and Chennai-Sudhmahadev roads under construction
- 2 new AIIMS in Samba and Awantipora
- 93 project worth Rs. 593 cr. under AMRUT scheme
- Conservation Plan for Wular and Dal lake
- 200 projects of Power generation, transmission and distribution

Building Jammu and Kashmir
Improving connectivity, infrastructure and Services
Industrial Ecosystem  
Identified Land Bank

- 6000+ acres of ready land bank for industries available at competitive price for investors  
- Earmarked sector specific land bank across suitable locations in JK, close to Airports, Highways and Rail links

Kashmir Land (in acres)
1. Ganderbal: 155
2. Srinagar: 91
3. Pulwama: 137
4. Anantnag: 334
5. Kulgam: 115
6. Bandipora: 297
7. Baramulla: 88
8. Budgam: 25
9. Kupwara: 125

Jammu Land (in acres)
10. Rajouri: 230
11. Udhampur: 928
12. Poonch: 115
13. Samba: 39
14. Jammu: 1495
15. Kathua: 256
16. Kishtwar: 85
17. Reasi: 3556
18. Doda: 40
Industrial Ecosystem

Vibrant and thriving industrial units

Our partners in growth
## Investible Projects

### Opportunities for Investors

<table>
<thead>
<tr>
<th>Tourism &amp; Hospitality</th>
<th>Film Tourism</th>
<th>Horticulture &amp; Post Harvest Management</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotels/ Motels/ Wellness Resorts</td>
<td>Film Studios</td>
<td>Processing Units</td>
</tr>
<tr>
<td>Spiritual/ Circuit/ Theme Tourism</td>
<td>Film cities</td>
<td>Cold Chain &amp; CA storage facilities</td>
</tr>
<tr>
<td>Ropeways</td>
<td>Film Institutes</td>
<td>Integrated Packaging Houses</td>
</tr>
<tr>
<td>Adventure Tourism/ water sports</td>
<td>Multiplexes</td>
<td>Food Park</td>
</tr>
<tr>
<td>Eco Tourism/ Wildlife Tourism</td>
<td>Implementation of Agri-Tech Solutions</td>
<td></td>
</tr>
<tr>
<td>Animal Husbandry &amp; Fisheries</td>
<td>Investible Projects</td>
<td>Opportunities for Investors</td>
</tr>
<tr>
<td>------------------------------</td>
<td>---------------------</td>
<td>-----------------------------</td>
</tr>
<tr>
<td>Fish and Poultry farms</td>
<td>Dairy, Egg and Meat Processing</td>
<td></td>
</tr>
<tr>
<td>Wool Processing</td>
<td>Cold Chain</td>
<td></td>
</tr>
<tr>
<td>Mega Aquaria/Trout Breeding</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Sericulture</th>
</tr>
</thead>
<tbody>
<tr>
<td>Integrated Rearing, Reeling &amp; Weaving Unit</td>
</tr>
<tr>
<td>Cold storage for Cocoon Preservation</td>
</tr>
<tr>
<td>Cocoon Reeling Units</td>
</tr>
<tr>
<td>Filature Units</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Herbal and Medicinal Plants</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mandi of Medicinal Plants on PPP Mode</td>
</tr>
<tr>
<td>Specialized AYUSH Wellness centres</td>
</tr>
<tr>
<td>Cluster mode cultivation of Medicinal and herbal plants</td>
</tr>
<tr>
<td>Processing units</td>
</tr>
</tbody>
</table>
## Investible Projects

### Opportunities for Investors

<table>
<thead>
<tr>
<th>Healthcare &amp; AYUSH</th>
<th>Pharmaceuticals</th>
<th>Manufacturing &amp; Mining</th>
</tr>
</thead>
<tbody>
<tr>
<td>Medi City</td>
<td>Pharma Park</td>
<td>Textile Park</td>
</tr>
<tr>
<td>Medical Education Development</td>
<td>R&amp;D Facilities</td>
<td>Light Engineering</td>
</tr>
<tr>
<td>Super Specialty Hospitals</td>
<td>Bulk Drug Manufacturing</td>
<td>High Precision Engineering Equipment</td>
</tr>
<tr>
<td>AYUSH</td>
<td>Biosimilars/ Biologics</td>
<td>Willow bat manufacturing</td>
</tr>
<tr>
<td>Wellness Centre</td>
<td>Nutraceutical Manufacturing</td>
<td>Mining</td>
</tr>
</tbody>
</table>
**Investible Projects**

**Opportunities for Investors**

### IT & ITeS
- BPO in 20 districts
- 2 IT Parks in Jammu and Srinagar
- Innovation and Incubation Hubs
- Software Technology Parks

### Renewable Energy
- Small Hydro Power projects
- Large Hydro Power plants
- 3 solar plants identified (20 MW)
- Energy Storage

### Infrastructure & Real Estate
- Airports
- Roads and Highways
- Metro Projects
- Urban Mobility
- Housing
- Waterfront beautification
Handloom & Handicraft

Craft City
Craft Parks
Urban Haats
Common Facility Centres

Educations & Skill Development

Residential Schools
Smart Schools
Education Infrastructure in PPP mode
Collaboration with Foreign Universities
Industry Academia partnership
Building Momentum for the Global Investors’ Summit

Tentative Roadshow Plan

1. **Chennai** (31st Jan, 2020)
   - Auto & Auto Component, Textile, IT & ITeS

2. **Ahmadabad** (08th Feb, 2020)
   - Textile, Food Processing, Manufacturing

3. **Surat** (10th Feb, 2020)
   - Textile, Food Processing, Manufacturing

4. **Bangalore** (14th Feb, 2020)
   - IT, Manufacturing, Food Processing, Biotech

5. **Kolkata** (17th Feb, 2020)
   - Engineering, Tourism

6. **Mumbai** (21st Feb, 2020)
   - Media and Entertainment, Financial Services

7. **Hyderabad** (27th Feb, 2020)
   - IT, Bio-Tech, Pharmaceuticals
Sh. Manoj Kumar Dwivedi, IAS  
Principle Secretary, Industries & Commerce  
Landline: +91-0191-2544050  
Email: icd-jk@nic.in

Sh. Ravinder Kumar, IAS  
MD, SIDCO & JKTPO (Nodal Agency JKGIS)  
Landline: + 91-0191-247800  
Email: Jkgis@mail.jk.gov.in

Ms. Anoo Malhotra, KAS  
Director, Industries & Commerce, Jammu  
Contact: 0191-2474085  
Email: directorindcomjammu@gmail.com

Mr. Mehmood Ahmad, KAS  
Director, Industries & Commerce, Kashmir  
Contact: 0194-2493041/2490018  
Email: dirindustries@yahoo.com