



Maharashtra Biotechnology Sector

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Maharashtra — The enduring leader

Macro Economic Profile for Maharashtra



The State attracts the highest FDI Investment — INR 97,799 crore (Aug '91 – March '12)

GSDP contribution	14.4 per cent of India GDP at current prices for 2011-12
Per Capita Income	INR 95,339 (at current prices)
Employment	14.58 per cent of India
Exports	21.4 per cent of India
Industrial output	16.7 per cent of India (as per the Annual Survey of Industries 2009-10)
Industry growth rate	9.1 per cent. (2010-11 E)

Source: Economic Survey of Maharashtra, 2012-13

Maharashtra — The enduring leader

Macro Economic Profile



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Road and Railways

- ▶ 99.2 per cent of the villages are well connected with all weather roads in the state
- ▶ 9.2 percent of total railway network in the country
- ▶ 2 Major Railway zones
- ▶ Dry Ports — Truck terminals and Railway sidings for easy freight movement

Industries

- ▶ Industrial Investment — Projects approved are 17779 inviting proposed investment of INR 9,50,972 Cr.
- ▶ Employment to be generated by the proposed projects is nearly 4 million that is nearly 20 per cent of national average
- ▶ FDI proposed investment INR 97799, 23 per cent of India

Air and Water Ports

- ▶ 4 International and 5 Domestic Airports
- ▶ 6 MIDC airstrips
- ▶ 3 Major ports
- ▶ 21.76 per cent of the total cargo traffic of the major ports in India is handled by the JnPT and MbPT ports
- ▶ 53 Minor ports

Electricity

- ▶ Total State generation 83017 Million kwh nearly 10 per cent
- ▶ Total consumption 87396 Million kwh more than 14 per cent of India
- ▶ Industrial consumption is at 34416 Million kwh more than 15 per cent of India

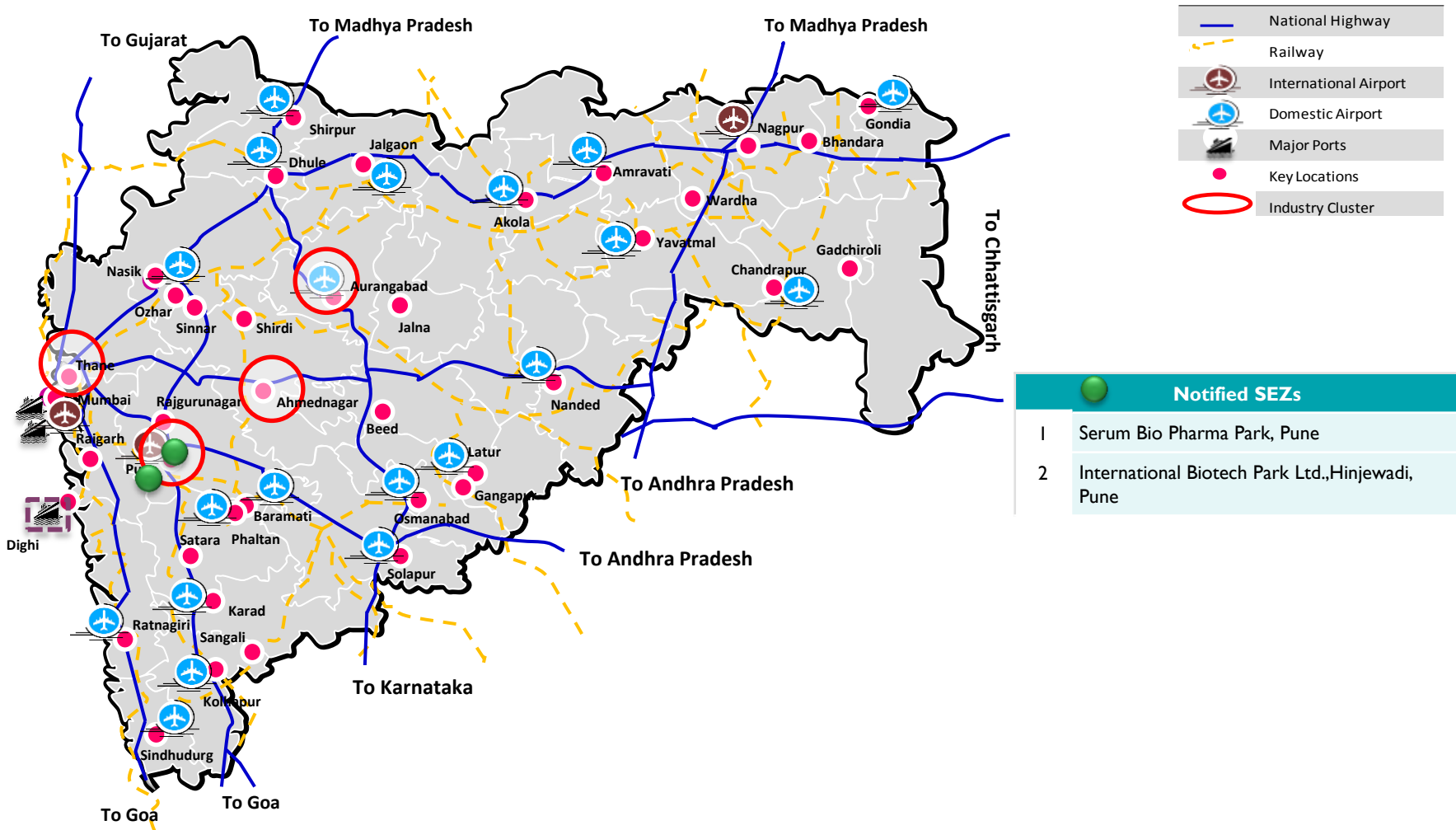
Source: Economic Survey of Maharashtra, 2012-13

INR 1380 Crore invested through 66 Biotech units in Maharashtra

- ▶ The Biotechnology sector is one of the major sectors of the country, the sector is poised to increase to USD 10 billion by 2015
- ▶ As per the Association of Biotechnology Led Enterprises (ABLE), the sector was estimated at around USD 4 billion in 2011
- ▶ India is amongst the top-12 biotech destinations in the world and ranks second in Asia, after China
- ▶ **Serum Institute of India Ltd., Pune** is the largest producer of the recombinant Hepatitis B, measles and DTP vaccines in the world
- ▶ As on March 2013, the state had a total of 66 registered biotech units, out of which 50 were MSME and 16 were large scale units
- ▶ The total investment in the Biotech units in the State stands at ~ INR 1380 Crores and an employment of 1584
- ▶ India's top services companies (Clinical Research Organizations) are also based in Maharashtra including the top CRO in the Indian industry, 'Quintiles India' and other top biotechnology companies viz. Monsanto, Mahyco, and Ajeet seeds

Growth Drivers

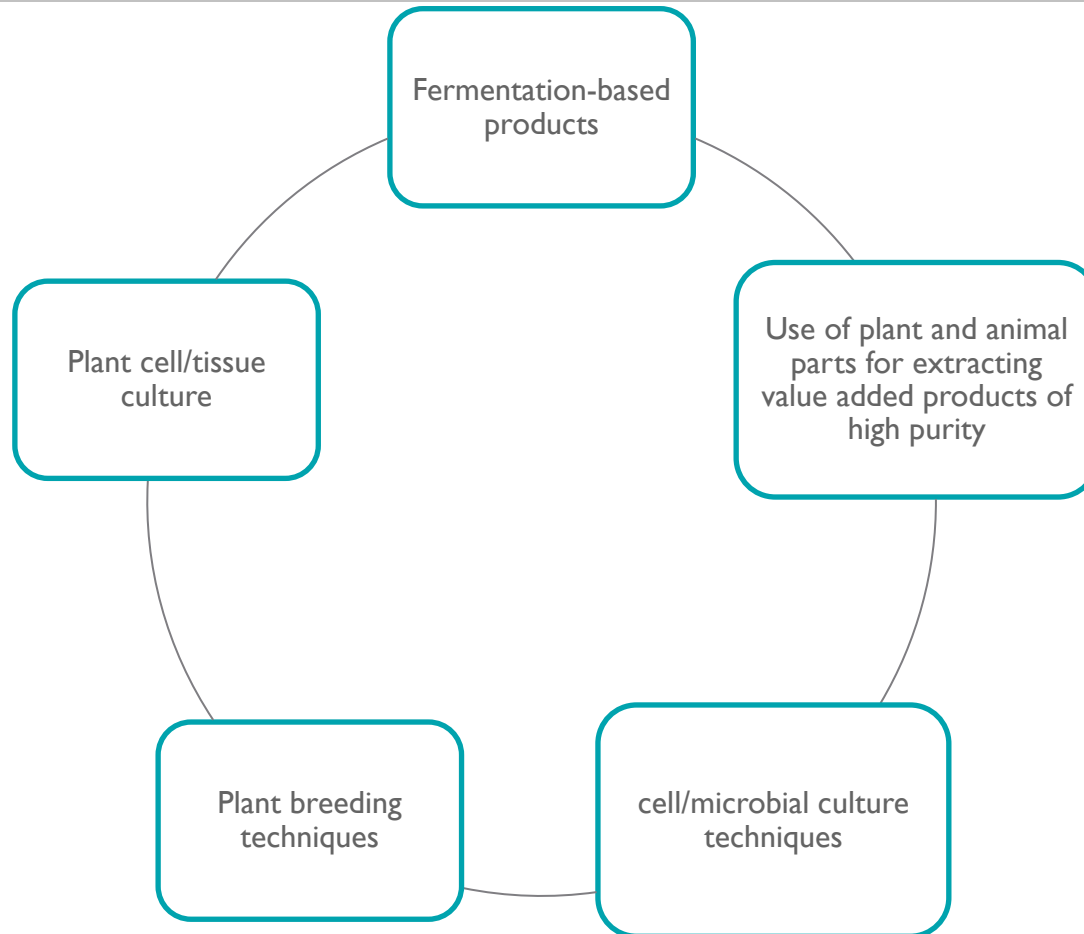
2 Public BT parks functional and 5 BT Parks and 8 BT SEZs proposed



Key Opportunities



The following sectors present key opportunities in the Biotechnology Sector



Maharashtra has a literacy rate of 82.9 per cent with a large base of skilled and industrial labor

- ▶ Bhabha Atomic Research Centre (BARC); Indian Institute of Technology (IIT); Tata Institute of Fundamental Research (TIFR); National Chemical Laboratory (NCL); National Centre For Cell Science (NCCS); National Institute of Virology (NIV); National AIDS Research Institute (NARI); Agharkar Research Institute (ARI); National Environmental Engineering Research Institute (NEERI); etc. are some of the leading institutions in Mumbai and Pune doing pioneering research work in the field of biotechnology
- ▶ Institute of Chemical Technology in Mumbai ranked as one of the top Public Sector Biotechnology Colleges in India. The Animal Diseases Investigations Laboratory, Pune involved in diagnosis and research of animal diseases, recognized as reference laboratory by Gol.
- ▶ Centre for Development of Advanced Computing (C-DAC), the Bhabha Atomic Research Centre, DRDO are conducting cutting edge research in biomedical, bioinformatics and biotechnology

Manpower strength in Maharashtra

Sector	Institutions	Capacity
Biotechnology*	19	794
Management Sciences	408	51735
Industrial Training Institutes	766	1,57,523

*(Agri)

Source: Biospectrum Study released in 2008, Maharashtra Economic Survey 2012-13 and http://business.gov.in/investment_incentives/investment_opp_mah.php accessed on 31 July 2013

Government Policy and regulatory support



Government Initiatives

- ▶ Under the Biotechnology policy 2001, Maharashtra Biotechnology Board, Maharashtra Biotechnology Commission and a special Biotechnology Development Fund has been set up for preparation of detailed action plans and approve financial proposals for financial grants from the BT fund. The State Government will also promote setting up of Biotechnology Parks, R&D Centers and pilot plant facilities for undertaking contract research by putting equity stakes in such projects
- ▶ As per GR dated 10.2.2009 the private BT parks are allowed in green zone / no development zone / commercial zone and private BT parks are eligible to get 100 percent additional FSI
- ▶ 2 Public BT parks functional and 5 BT Parks and 8 BT SEZs proposed to generate employment of 0.94 lakh

State policy support

Industrial Promotion Subsidy (IPS)

Incentives for Cleaner Production

Incentives for Technology Up gradation

Interest Subsidy

Exemption from Electricity Duty

Waiver of Stamp Duty

Royalty Refund

Incentive for Water Conservation

Incentive for Water & Energy Audit Subsidy

Incentive for Water & Energy Subsidy

Relevant documents to refer to:

- ▶ Maharashtra Industrial Policy 2013
- ▶ Maharashtra Biotechnology Policy 2001
- ▶ Package Scheme of Incentives 2013
- ▶ Maharashtra SEZ Policy 2001

Key players

Maharashtra Biotechnology Sector: Key Players



For further enquiries ..



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