

**Tamil Nadu
Export Strategy
2014**

Guidance Bureau

Industries Department

Government of Tamil Nadu

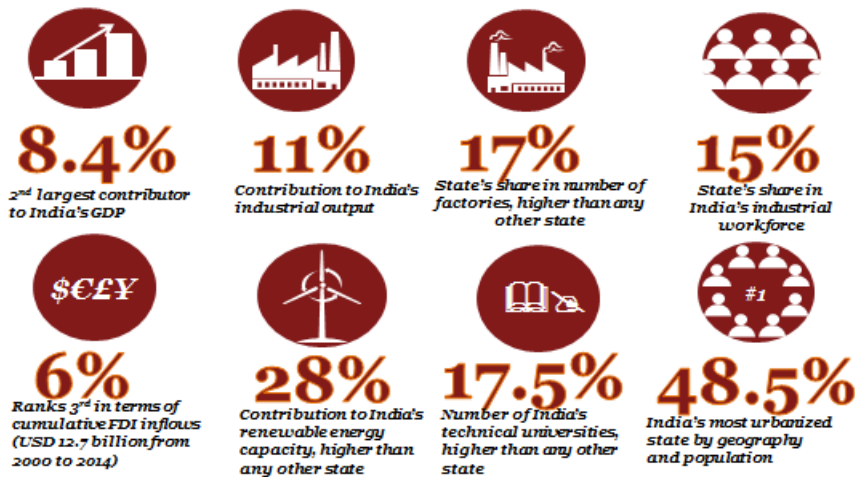
Tamil Nadu Export Strategy

I. Strengths of Tamil Nadu

State's Economic Profile – State's Gross Domestic Product and Per Capita SDP

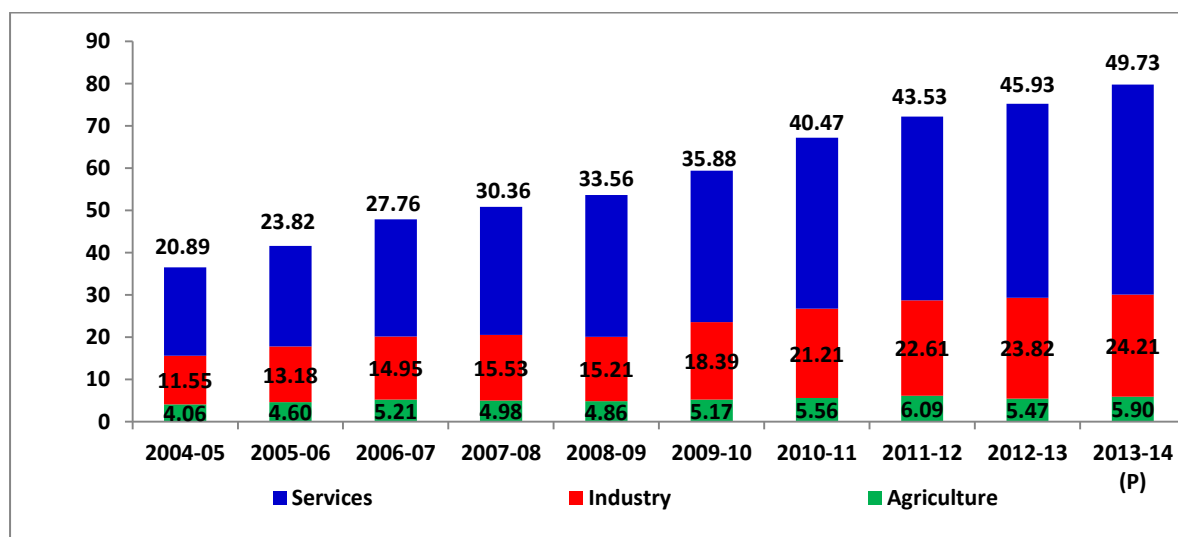
Tamil Nadu is currently ranked “Second” largest state economy in India.

Tamil Nadu – India's economic powerhouse

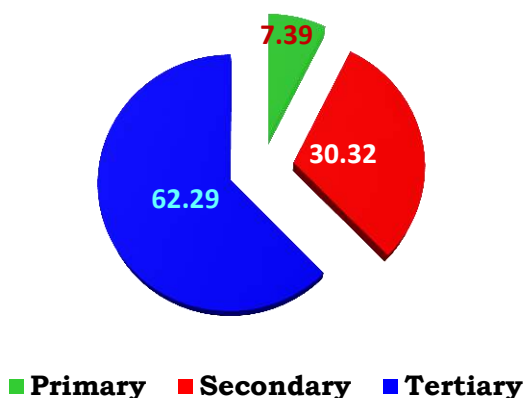


In year 2013-14, Tamil Nadu contributed 8.4 per cent to India's GDP. Gross state domestic product (GSDP) of Tamil Nadu grew at a compound annual growth rate (CAGR) of about 9 per cent between 2004-05 and 2013-14, higher than the national average of about 7.5 percent. The state's GSDP at constant prices has more than doubled than US \$ 36.5 billion in 2004-05, to US \$ 80 billion (Rs.478,975 crores) in 2013-14. Robust economic growth of the state is predominantly attributed to a stellar performance of industries and services sector, registering a CAGR of 9% and 10% respectively.

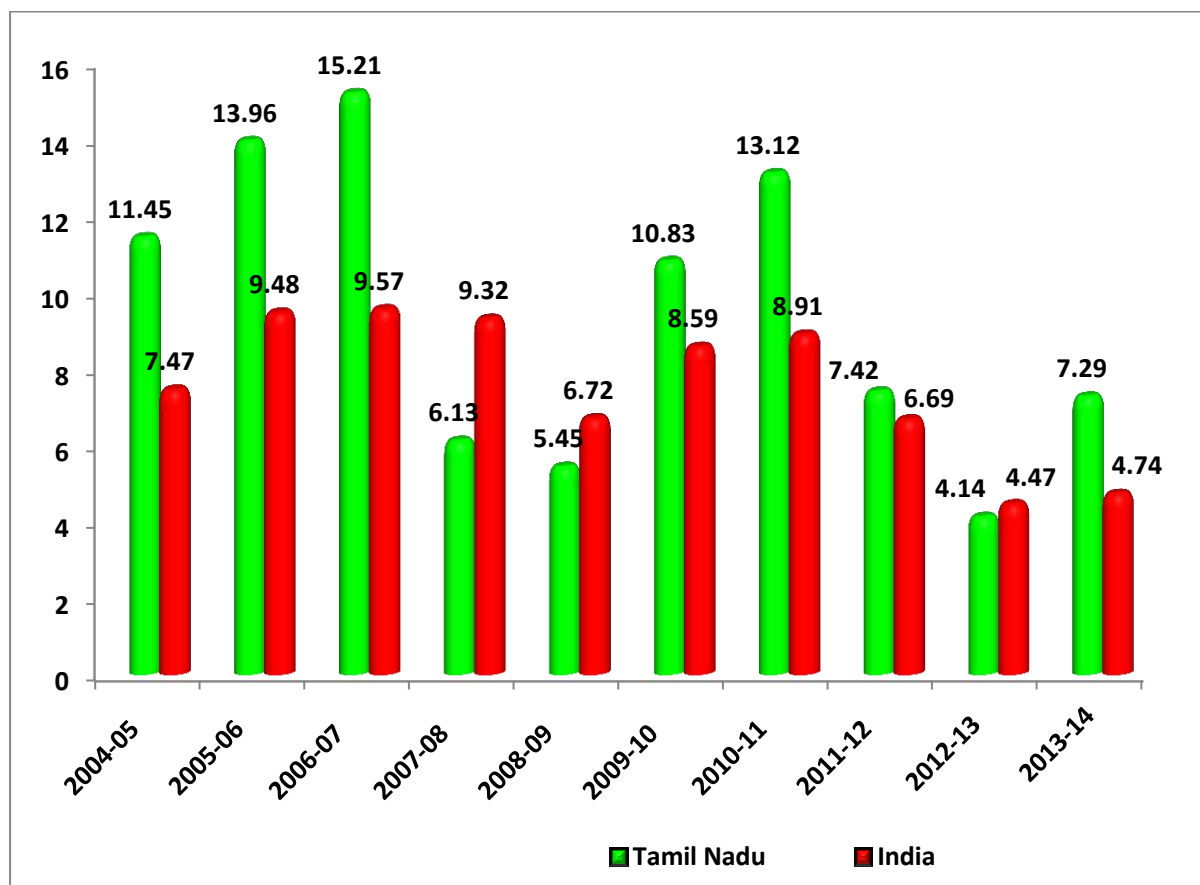
GSDP Growth (at 2004-05 constant prices) – US \$ billion



Tamil Nadu



At current prices, the State GSDP is about Rs.851,000 crores (US \$ 145 billion).



a) *Industry*

Tamil Nadu is well known for diversified industrial base. The state ranks first among the states in terms of number of factories and industrial workers. Among major states, Tamil Nadu accounts for the highest number of factories (17 per cent), followed by Maharashtra (12 per cent), Andhra Pradesh (11 per cent) and Gujarat (10 per cent).

The state is a principal contributor of industrial output. As indicated in the following exhibit, the state contributes significantly to the national output.

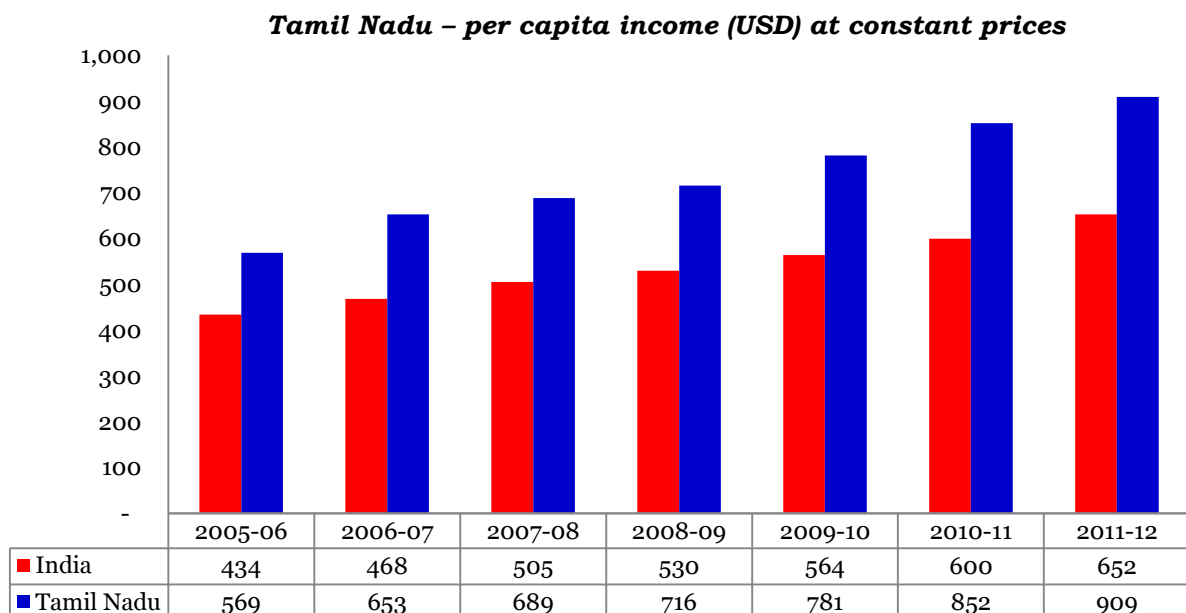
Product	% share of TN in India
Automobiles (cars only)	36%
Commercial vehicles	35%
Auto parts	33%
Leather products	40%
Textiles	33%
Spinning capacity	47%
Powerlooms capacity	20%
Software & ITES	11.6%

Manufacturing sector in Tamil Nadu:

- ❖ First in number of factories – 42,288
- ❖ First in number of workers employed in factories sector – 2.23 million
- ❖ First in annual turn-out of Engineering graduates and technicians
- ❖ One of Top Three FDI destinations in India – More than 3000 Foreign companies in Tamil Nadu - 523 Japanese companies in Tamil Nadu
- ❖ 51 Fortune 500 companies in Tamil Nadu: Ford, Delphi, Visteon, Hyundai, Daimler, Nokia, DELL, Flextronics, Nissan, Toshiba, Yamaha, Mitsubishi, Komatsu

2. *Per-capita income*

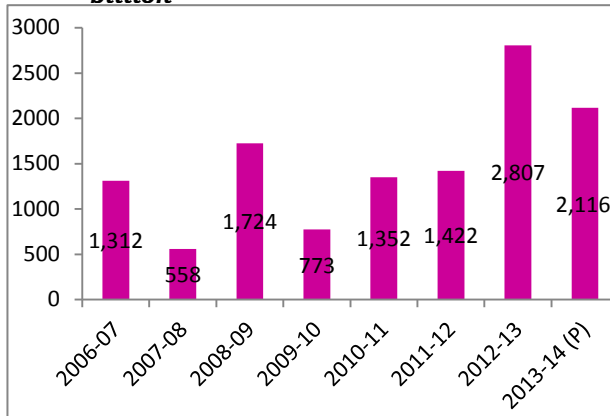
In 2011-12, per capita income in Tamil Nadu (at constant prices) is estimated at US \$ 909 in 2011-12, which is higher than the national average of US \$ 652 by almost 40%. Tamil Nadu has consistently ranked among the top 5 states in India on many social, economic and developmental parameters. The following exhibit depicts per-capita income trend:



3. Foreign Direct Investment in Tamil Nadu

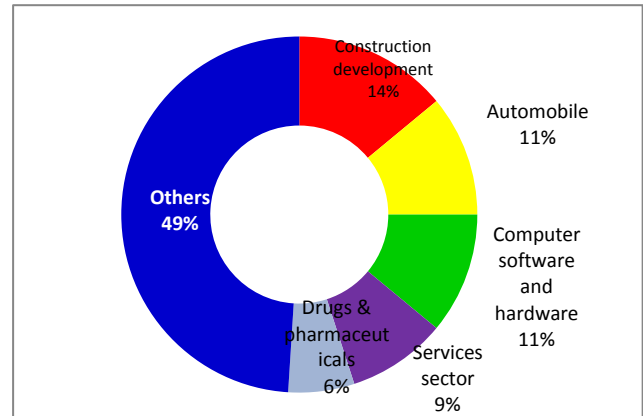
With cumulative FDI inflows of over US \$ 12.5 billion from year 2000-01 to 2013-14, Tamil Nadu ranks third in terms of FDI inflows into India. Electricity, manufacturing and services accounted for majority of FDI inflows. The state has received majority of FDI from Mauritius, Singapore, USA, Japan and Netherlands.

Year-wise FDI inflows into Tamil Nadu – USD billion



Source: DIPP, GoI

Sector-wise FDI inflows into Tamil Nadu



Source: DIPP, GoI

Top sectors accounting for majority of the FDI inflows are construction development, automobiles, computer software/hardware, services and drugs/pharmaceuticals, collectively accounting for 51% of the total.

4. Exports from Tamil Nadu

Accounting for almost 12% of India's exports, the state exported products and services worth US \$ 28 billion in 2011-12, indicating a CAGR of 20% as compared with 2007-08. The state has emerged as a key exporter of engineering goods, computer software, electronic goods, textiles, agricultural and processed foods, etc as indicated in the following exhibits:

Natural – availability of raw materials like ores and minerals, topography / climate of products particularly Agro product

Tamil Nadu is the leading holder of country's resources of vermiculite, magnetite, dunite, rutile, garnet, molybdenum and ilmenite. The State accounts for the country's 81% lignite, 75% vermiculite, 69% dunite, 59% garnet, 52% molybdenum and 30% titanium minerals resources. Important minerals that are found to occur in the State are as follows:

- **Bauxite** in Dindigul, Namakkal, Nilgiris & Salem districts;
- **Dunite/pyroxenite** in Salem district;
- **Felspar** in Coimbatore, Dindigul, Erode, Kanchipuram, Karur, Namakkal, Salem & Tiruchirapalli districts;
- **Fireclay** in Cuddalore, Kanchipuram, Perambalur, Pudukottai, Sivaganga, Thiruvallur, Tiruchirapalli, Vellore & Villupuram districts;

- **Garnet** in Ramanathapuram, Tiruchirapalli, Tiruvarur, Kanyakumari, Thanjavur & Tirunelveli districts;
- **Granite** in Dharmapuri, Erode, Kanchipuram, Madurai, Salem, Thiruvannamalai, Tiruchirapalli, Tirunelveli, Vellore & Villupuram districts;
- **Graphite** in Madurai, Ramnathapuram, Shivganga & Vellore districts;
- **Gypsum** in Coimbatore, Perambalur, Ramnathapuram, Tiruchirapalli, Tirunelveli, Thoothukudi & Virudhunagar districts. Similarly, occurrences of minerals, such as,
- **Lignite** deposits are located in Cuddalore Ariyalur, Thanjavur, Thiruvarur, Nagapattinam & Ramanathapuram districts;
- **Limestone** in Coimbatore, Cuddalore, Dindigul, Kanchipuram, Karur, Madurai, Nagapattinam, Namakkal, Perambalur, Ramnathapuram, Salem, Thiruvallur, Tiruchirapalli, Tirunelveli, Vellore, Villupuram & Virudhunagar districts;
- **Magnesite** in Coimbatore, Dharmapuri, Karur, Namakkal, Nilgiri, Salem, Tiruchirapalli, Tirunelveli & Vellore districts;
- **Quartz/silica sand** in Chennai, Coimbatore, Cuddalore, Dharmapuri, Dindigul, Erode, Kanchipuram, Karur, Madurai, Namakkal, Periyar, Perambalur, Salem, Thiruvallur, Thiruvarur, Nagapattinam, Tiruchirapalli, Villupuram, Virudhunagar & Vellore districts;
- **Talc/ steatite/soapstone** in Coimbatore, Salem, Tiruchirapalli & Vellore districts;
- **Titanium minerals** in Kanyakumari, Nagapattinam, Ramanathapuram, Thiruvallur, Tirunelveli & Thoothukudi districts;
- **Vermiculite** in Dharmapuri, Tiruchirapalli & Vellore districts;
- **Zircon** in Kanyakumari district have been established. Other minerals that occur in the State are **apatite** in Dharmapuri & Vellore districts;
- **Barytes** in Erode, Madurai, Perambalur, Tirunelveli & Vellore districts;
- **Bentonite** in Kancheepuram district;
- **Calcite** in Salem district;
- **China Clay** in Cuddalore, Dharmapuri, Kanchipuram, Nilgiris, Sivaganga, Thiruvallur, Thiruvannamalai, Tiruchirapalli & Villupuram districts;
- **Chromite** in Coimbatore & Salem districts;
- **Copper, lead-zinc** and **silver** in Villupuram district;
- **Corundum and gold** in Dharmapuri district;
- **Dolomite** in Salem & Tirunelveli districts;
- **Emerald** in Coimbatore district;
- **Iron ore (magnetite)** in Dharmapuri, Erode, Nilgiris, Salem, Thiruvannamalai, Tiruchirapalli & Villupuram districts;
- **Kyanite** in Kanyakumari & Tirunelveli districts;
- **Molybdenum** in Dharmapuri, Dindigul & Vellore districts;
- **Pyrite** in Vellore district;
- **Sillimanite** in Kanyakumari, Karur & Tirunelveli districts;
- **Tungsten** in Madurai & Dindigul districts;
- **Wollastonite** in Dharmapuri & Tirunelveli districts.
- **Petroleum and natural gas deposits** are located in Cauvery basin area.

Warehousing infrastructure in Tamil Nadu:

The Central Warehousing Corporation of Government of India has 57 warehouses in Tamil Nadu with a combined storage capacity of 6.45 Lakhs MT. Apart from this, the Tamil Nadu Warehousing Corporation has drawn up an ambitious plan to increase its storage capacity in the State, from 6.68 lakh tonnes to 8.71 lakh tonnes, by setting up 39 godowns in 20 locations by 2014.

At present, TNWC has 252 godowns in 57 locations to store agriculture products, and the occupancy ratio is over 86 per cent. Most of these godowns have a maximum storage capacity of 5,000 tonnes each.

By the year end, TNWC is expected to add nine godowns in two places with a capacity of 36,400 tonnes, while it might take one more year for another 30 godowns in 18 sites to be ready.

According to TNWC, it was planned in April 2013 to build 44 godowns in phases accounting for 45,000 tonne capacity, followed by 33,400 tonne and 1.25 lakh tonne.

In the first phase, nine godowns have been constructed under the Private Entrepreneur Godown Scheme. Five godowns built at Karaikudi, Arupukottai and Kovilpatti. Remaining four godowns at Maduranthakam and Chinnasalem would be commissioned by July and August at a cost of Rs.10 crore.

TNWC had decided to construct 10 more godowns at a cost of Rs.23 crore in two parts. About five godowns would be completed by December 2013 for which preliminary works had begun.

In the first part, the godowns would come up in Athur, Krishnagiri, Vellore and Manamadurai with a storage capacity of 3,400 tonne each, while the one at Vathalagundu with 2,800-tonne capacity would cost Rs.10 crore.

The second phase would cover Nagapattinam, Tiruchengode, Tirupattur, Valangaiman and Nannilam.

These godowns would have a storage capacity of 3,400 tonne each, for which civil works have been initiated and the investment is Rs.13 crore.

Infrastructure development in Tamil Nadu:

Infrastructural – ports, airports, good roads, warehouses, container and cold chain facilities etc.

Power Generation in Tamil Nadu:

Tamil Nadu state has an installed capacity of about 20700 MW. Of this about 60% is from conventional sources including thermal power, hydroelectric power and gas based projects. The remaining 40% of the power capacity is accounted

for significantly by wind power of about 7200 MW. Besides, there are solar power projects, biomass and cogen plants that account for the remaining part of non-conventional energy. It is pertinent to note that Tamil Nadu has the 5th largest wind power generation capacity in the world. In terms of total installed capacity of state sector projects and allocation from central sector projects, Tamil Nadu is the third largest in the country.

As on 31.5.2014	Capacity in MW
Hydel capacity	2284.40
Thermal – coal based	4657
Gas based	515.88
Private sector (IPP)	1154.16
Central share	3870
Wind Power	7252.61
Cogeneration	659.4
Biomass	211.0
Solar	107.20
Waste to energy	4.25
Grand Total	20715.90 MW

The state currently manages supply from internal generation and also through power purchase. The current power demand is about 13500 MW and is expected to go up to 14500 MW by next year (2014-15). The peak demand for the state is likely to be around 20800 MW by 2017-18. Tamil Nadu is expected to be power surplus by the year 2015-16. To manage short term peak demand, the state is undertaking purchase of power from open market. The state government intends to ensure uninterrupted power supply with all these measures. It needs to be noted that the power demand in terms of kwh (units) for Tamil Nadu in 2032 is 409 billion kwh. Against this, the planned capacity additions and procurement would ensure availability of 441 billion units. This would mean a surplus of 32 billion kwh of power by 2032.

Port Infrastructure:

Tamil Nadu is the only state with 3 major ports in the country. The three major ports are located at Chennai, Ennore (near Chennai) and Tuticorin. Apart from 3 major ports, L&T Port at Ennore is one of the modern ports but classified as Minor port under Tamil Nadu Maritime Board.

The major ports in Tamil Nadu together handled 165.4 million tonnes during the year 2013-14. Besides these, there are 5 minor ports with cargo handling

operations. As per the Maritime Agenda of the Ministry of Shipping, Government of India; the expected cumulative handling capacity at these major ports alone is 238 million tonnes by 2020. In addition to these, there are 15 non major ports whose cumulative handling capacity is expected to be 45 million tonnes. Large projects on the anvil include container capacity augmentation at Chennai Port, new container terminal development at Ennore Port and development of outer harbour at Tuticorin Port. On the other hand, the Tamil Nadu Vision 2023 document envisages a further addition of cargo handling capacity to the extent of 150 million tonnes through 3 greenfield ports and 5 minor ports.

Cold Storages:

At present, there are 136 cold storages in Tamil Nadu handling a variety of products including horticultural products, marine products, Dairy and poultry products. The total capacity of these 136 cold storages is about 2.27 Lakhs MT.

Urban Infrastructure:

Tamil Nadu is the most urbanized state in India with about 48% of its population living in urban areas. Besides Chennai, which is a designated metropolitan city; Trichy, Madurai, Coimbatore, Salem and Tirunelveli are large cities spread across the length and breadth of the state. The urban agglomeration in Chennai (Chennai Metropolitan Area) houses a population of about 8.7 million. The ambitious Chennai Metro Rail project with financial assistance from JICA is underway at a cost of US \$ 2.4 billion for its first phase alone. This would cover about 45 km network Phase 2 of Chennai Metro Rail is under planning at a cost of US \$ 6 billion. Besides these, Chennai is also expected to have a monorail network of more than a 100 km. The cities Coimbatore and Madurai have already crossed a million population mark while the cities of Salem and Trichy are close to a million. Tamil Nadu has envisioned monorail connectivity for two cities other than Chennai as part of its Vision 2023 at a cost of US \$ 10.8 billion. Besides these, the Vision for Urban infrastructure envisages Chennai city development, transforming 10 cities into world class cities with 24x7 water supply, sewerage treatment, solid waste management with focus on achieving garbage free environment and also special focus on housing sector with 2.5 million houses expected to come up in the next 11 years. The urban infrastructure initiatives other than connectivity projects are budgeted at a total cost of US \$ 45.8 billion.

Roads and Highways:

Tamil Nadu has a total road network of about 20 million km. This includes National Highways, State Highways, major district roads, other district roads and rural roads. The road length excluding rural roads is about 62,000 km. The road density of Tamil Nadu is 177 km per 100 sq. km of land. Tamil Nadu is better than the national average which stands at 148 km per 100 sq. km of land. Tamil Nadu's superiority in Road infrastructure is also established from the fact that almost 100% of the National Highway network of Tamil Nadu is at least 2 lane capacity with more than 50% of the roads with multi-lane (4 or more lanes) capacity. On the other hand, the national average indicates that only 74% of the

National Highway network with at least double lane standards. The superior road network of Tamil Nadu is one of the strong reasons for the economic development achieved by it. The TN Vision 2023 envisages augmentation of road network in such a way that the state would have 5000 km of State Highways with 4 lane capacity and at least 2000 km of highways/expressways with 6/8 lane capacity. This also includes a triangular corridor development connecting Chengalpattu-Coimbatore-Tuticorin. This would also accommodate future evacuation needs of the state given the prospects for economic growth.

Airport Infrastructure:

The state of Tamil Nadu has 3 international airports at Chennai, Coimbatore and Trichy. In addition, the Customs airport at Madurai also handled international flights. Besides, there are 2 domestic airports at Salem and Tuticorin. The 3 international airports and the airport at Madurai accounted for about 10% of the total air traffic movements in India for the year 2013-14. During the same period, these airports handled close to 16 million passengers. This forms 9.3% of total passenger traffic in India. On the freight transport category, these airports account for 13% of air freight handled in India. The Indian air freight market is 2.2 million tonnes of which these airports handled 0.31 million tonnes during 2013-14. Thus the airports in the state command great significance in terms of connectivity. Chennai is the busiest airport in the state which directly connects 20 international destinations directly with more than 150 services every week. Destinations like London, Dubai, Frankfurt, Singapore, Malaysia etc. are directly connected with Chennai. Besides, Trichy airport is connected directly with Colombo. Coimbatore is connected to Bangkok, Singapore and Sharjah. All these airports are connected with major cities in India. In addition to these airports, the international airport at Thiruvananthapuram in Kerala can also be used to reach destinations in southern districts of Tamil Nadu.

The Government plans to upgrade the capacity of airports in Tamil Nadu. The Chennai Airport has been modernized recently. There is another airport planned in Sriperumbudur to cater to the growing needs of Chennai city. The Airports Authority of India has planned to expand the capacities of other airports in the state and hence acquisition of land for other airports is under consideration.

Human resources Development:

The state is the largest producer of skilled manpower in India and pioneers in promoting technical education in private sector. Tamil Nadu has the largest intake capacity among all the states for engineering and technical education. The annual intake of 620 Engineering institutes at under graduate level is over 250,000 students. Out of this around 90,000 students specialize in IT, Computer Science & electronics telecommunication. There is an annual turnout of more than 1 million graduates diploma holders and ITI workers.

Apart from this, Tamil Nadu has 501 Polytechnics with an intake capacity of 1.84 lakhs. Further, Tamil Nadu has 1552 Industrial Training Institutes and Industrial training Schools with an annual intake capacity of 1.17 lakhs.

To sum up, Tamil Nadu is endowed with abundant availability of skilled manpower at competitive wage costs.

Communication Infrastructure

Tamil Nadu has an excellent network of OFC network and availability of reliable large bandwidth is a major advantage. With 3 submarine cables Chennai has the largest bandwidth connected among Indian cities. The Bharti Airtel “i2i” submarine cable has the largest bandwidth of 8.4 tbps. This cable links Chennai with Singapore. The Cable consists of 8 fibre pairs using DWDM Multiplexing with full capacity of 8.4 Tbit/s when all 105 wavelengths are used. This cable connects with C2C Cable network, SEA-ME-WE 3 and Asia Pacific Cable Network. **South East Asia–Middle East–Western Europe 4 (SEA-ME-WE 4)** is an optical fibre submarine communications cable system that carries telecommunications between Singapore, Malaysia, Thailand, Bangladesh, India, Sri Lanka, Pakistan, United Arab Emirates, Saudi Arabia, Sudan, Egypt, Italy, Tunisia, Algeria and France. This cable also has a landing point in Chennai. The third submarine cable that has a landing point in Chennai is **TIISCS** (Tata Indicom India-Singapore Cable System), also known as **TIC** (Tata Indicom Cable linking India and Singapore. The cable with 5.12 terabit per second will significantly increase the existing bandwidth capacity into India, which is the second fastest growing communications route in the world.

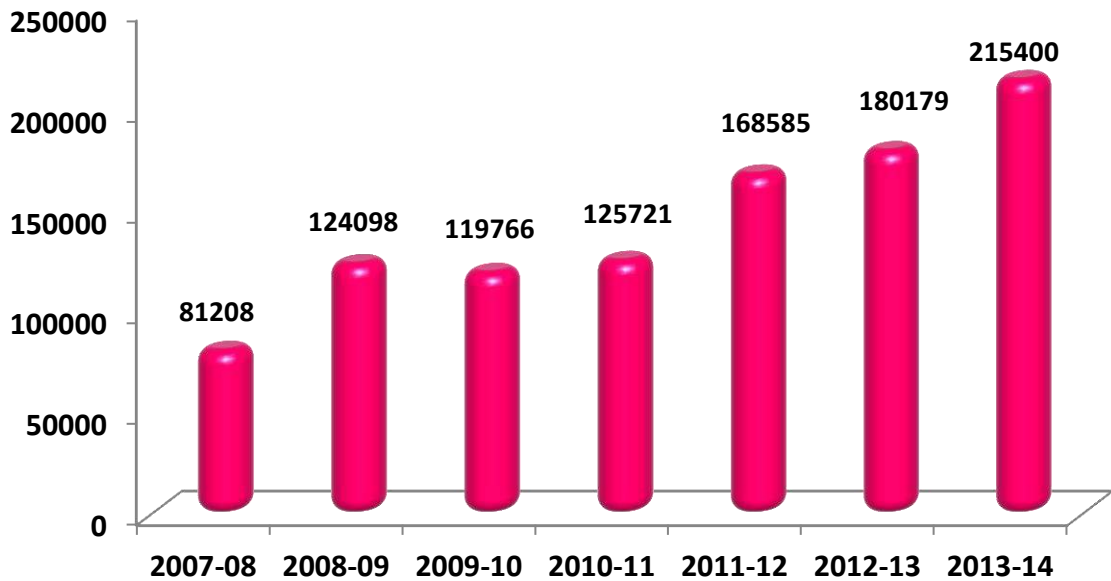
All the three submarine cables offer a combined bandwidth of over 13.6 Tbps making Chennai the *numero uno* in bandwidth availability. Reliable availability of bandwidth has made Chennai as the most preferred city for international financial institutions like World Bank, Stanchart Bank, HSBC, ABN Amro Bank, etc.

a. Commercial Profile of States (production for exports) – Main commodities produced and exported by the States;

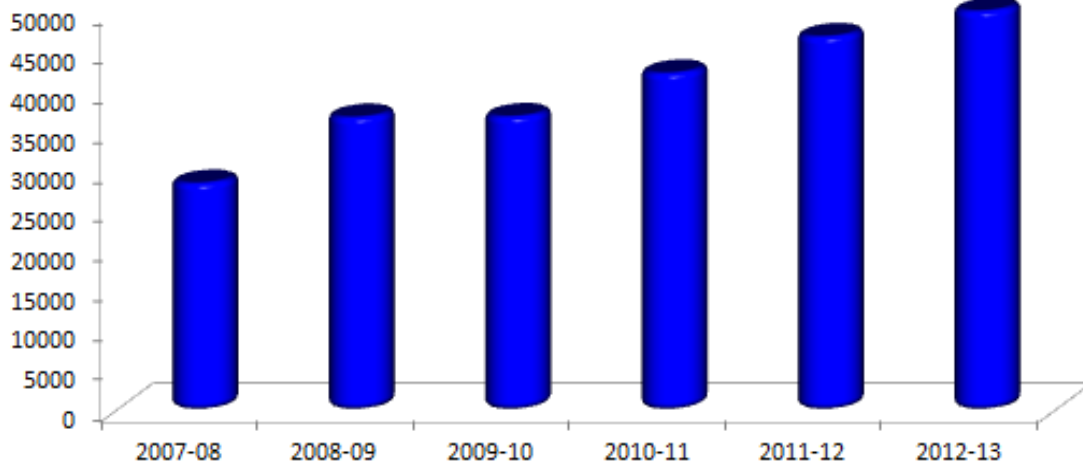
Share of Exports from Tamil Nadu: (US\$ Billions)

Year	India Exports	Tamil Nadu Exports	Share of Tamil Nadu %
2010-11	245.90	22.13	9.0%
2011-12	303.70	28.80	9.45%
2012-13	300.60	33.50	11.14%
2013-14	312.35	35.90	11.49%

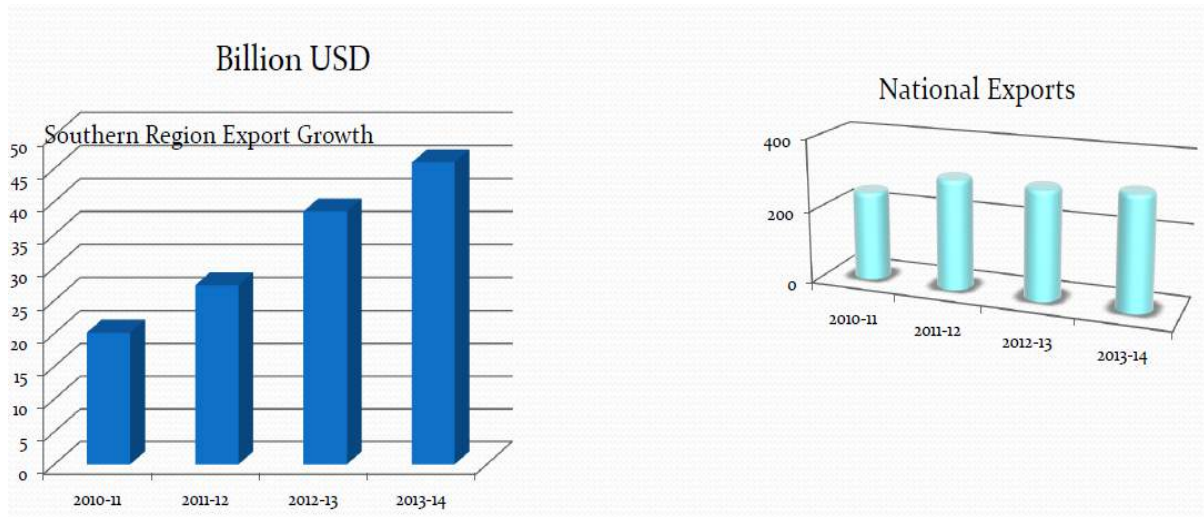
Exports from Tamil Nadu Rs. in crores



Tamil Nadu Software exports Rs. crores

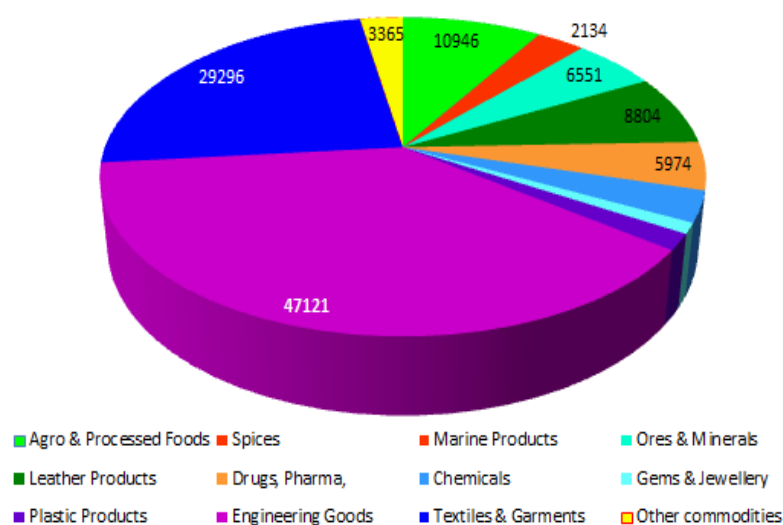


- Tamil Nadu - one of Top Three software exporters - 34 IT SEZs and about 1800 exporting units
- About 4.50 lakhs software professionals employed
- Chennai - the Financial BPO hub



- Tamil Nadu's exports stood at a value of Rs.215,400 crore during 2013-14. The Government has set a target to double the exports by 2016-17 in New Industrial Policy 2014.
- Tamil Nadu is the Third largest exporting state. Tamil Nadu's share in the export of the country is 11.5% in 2013-14.
- Gujarat and Maharashtra occupy the first and second place with a share of 14.70% and 12.7% respectively.
- The share of Southern region is 23.70% with 74 billion US \$.
- The share of export of Tamil Nadu in the country has grown from 9.0% in 2010-11 to 11.5% in 2013-14. The share of Tamil Nadu among the Southern States is 46%
- The major products exported from Tamil Nadu are:
 - Computer software & Electronic goods(12,380 US \$ million),
 - Textiles and Readymade garments(6070 US \$ million),
 - Finished Leather & Leather goods(2890 US \$ million),
 - Agricultural products & Processed food(1490 US \$ million),
 - Engineering goods(1150 US \$ million)(including Automobiles and Automobile parts) and Ores and minerals(1090 US \$ million).
- The growth of exports during 2011-12, 2012-13 and 2013-14 are 23.36%, 22.71% and 7.16% respectively.

Exports from Tamil Nadu 2012-13 Rs. crores



Major Items of Exports and potential exports (US\$ Millions)

PRODUCTS	2011-12	2012-13	2013-14
Tea	30	20	20
Coffee	30	30	30
Agricultural & Processed Foods	1270	1370	1490
Cashew & Cashew Nut Shell Liquid	260	290	360
Spices	310	360	480
Marine Products	510	600	710
Sports Goods	10	10	10
Ores & Minerals	1160	1170	1090
Finished Leather & Leather Goods	1870	2210	2890
Drugs, Pharma, Fine Chemicals, Cosmetics	1270	1410	1430
Chemicals & Allied Products	820	800	840
Gems & jewellery	200	180	160
Plastic & Linoleum Products	450	480	500
Engineering Goods	8140	970	1150
Computer Software & Elec. Goods	8870	11350	12380
Textiles & Readymade Garments	5480	5240	6070
Silk Goods	10	10	10
Coir & Coir Manufactures	80	80	110
Carpets & Handicrafts	60	60	60
Other	2030	7220	6430
TOTAL EXPORS	32860	33850	36220

II. Export Targets for Tamil Nadu:

Tamil Nadu has set a target to double its exports from current level of US \$ 35.90 Billion to **US \$ 70 Billion** within next 5 years.

III. Potential Destinations for identified items of Exports

Important destinations for exports from Tamil Nadu are:

- European Union (EU) particularly Germany, France, UK and Netherlands
- USA
- South Korea
- Japan
- Gulf Region particularly UAE and Saudi Arabia
- Singapore and
- Malaysia

IV. Export Promotion measures at State level

Organization and participation in Trade Fairs in the State

The State Government jointly with India Trade Promotion Organisation (ITPO) has established “Chennai Trade Centre” – an exhibition complex with a Convention centre to organise International exhibitions and Fairs. This exhibition complex has 3 hall sat present:

Hall details	Area in sq.Metres
Hall – 1	4400
Hall – 2	4400
Hall - 3	1760
Total	10560 sq.metres

Convention Centre with a seating capacity: 2000 Nos.

Incentive Schemes particularly fiscal incentives such as export development schemes, financial assistance for participation in Trade Fairs abroad, etc.

Government of Tamil Nadu offers following incentives to Micro and Small enterprises:

- Participation in International Fairs – (Full subsidy on space rent and shipment of exhibits of MSEs)
- MSE Market Development Assistance scheme (funding up to 90%)of to and fro air fare for participation by MSE entrepreneurs in Overseas Trade Fairs / Trade delegations. The funding also provides for producing publicity materials (upto 25% of the costs).
- Sector specific studies (upto Rs.2 lakhs) and for contesting anti-dumping cases (50% upto Rs.1 lakh).

- a. **Setting up of Export Parks:** Tamil Nadu is currently ranked “Second” among Indian states in promoting Special Economic Zones. According to MOCI, GoI, the position of Tamil Nadu is as follows:

State-wise SEZ position as on 1.9.2014

States/UTs	Formal Approvals	In-principle approvals	Notified SEZs	Exporting SEZs (Central Govt. + State Govt./Pvt. SEZs + notified SEZs)
Andhra Pradesh	44	4	33	18
Gujarat	42	6	29	18
Haryana	39	3	28	6
Karnataka	61	0	40	25
Kerala	30	0	25	14
Madhya Pradesh	19	1	9	2
Maharashtra	99	11	66	25
Odisha	10	1	5	1
Rajasthan	10	1	10	4
Tamil Nadu	66	5	53	34
Telangana	64	0	45	24
Uttar Pradesh	32	1	22	10
West Bengal	17	3	9	6
India (including others)	564	38	388	192

SEZs in Tamil Nadu:

Sector-wise distribution of SEZs in TN

Sector	Formal SEZs	In-Principle SEZs	SEZs approved before the SEZ Act
Electronic hardware	6		
IT / ITES	36		1
Textiles	1	1	1
Auto Ancillaries			1
Airport / Aviation		1	
Telecom			1
Footwear	2		
Engineering	5		
Hardware & Software	1		
Multi Product	3	2	1
Multi Services	1	1	
FTWZ	2	1	
Food Processing	1		
Leather	1		
Steel	1		
Biotechnology	1		
Petrochemical, Petroleum	1		
Non Conventional Energy	1		
Granite	2		
Copper	1		
Total	66	6	5

Involvement and Action plan with relevant EPC's

- The State is proposing to establish “**Tamil Nadu Export Promotion Committee**” under the Chairmanship of Chief Secretary to Govt of Tamil Nadu, wherein the senior officials of Government (both State and Central Govts including Customs and Port authorities), all Export promotion Councils, Chambers of Commerce and FIEO Southern Region as members. The “**Tamil Nadu Export Promotion Committee**” shall meet once in 3 months to discuss and address various Policy level issues and provide suggestions to enhance exports from the State.

V. Trade Facilitation Measures

a. Single Window Clearance for projects:

The State Government has constituted Single Window Facilitation mechanism for both large as well as MSME projects:

- Guidance Bureau designated as Single Window agency for large projects and
- District Level Single Window committees for MSME projects.
- A High Power Single Window Facilitation Monitoring Committee under the Chief Secretary to ensure that approvals are given expeditiously.

b. Setting up of Trade Facilitation Centers

Government of Tamil Nadu has taken following initiatives:

- A Comprehensive Trade Information Portal with network connectivity to all District Industries Centre is being set up by Directorate of Industries and Commerce.

VI. Efforts being made to mainstreaming of exports at State level – for instance, Trade (Exports) considered widely as part of development strategy of the states and recognizing the need for institutional infrastructure, i.e., legal / regulatory systems, capacity building, R & D, fixing export targets, etc.

Government of Tamil Nadu has taken following initiatives:

- The role of the Industries Commissioner and Director of Industries and Commerce of Government of Tamil Nadu has been amplified also as “State Exports Commissioner” to coordinate with various departments of State and the Central Government to facilitate, enhanced export promotion, facilitate exports and work towards procedural simplification of export documentation formalities.

- Many exporters are not aware of the various databases and sources available on the Internet. Hence, there is a need for the State to guide such exporters by providing them a window to such useful resources. A one stop information source for trade and business information to help the State's exporters and prospective business partners fulfil their information needs, by establishing a comprehensive information portal with network connectivity to all District Industries Centre is vital. In view of this, the existing Export Guidance Cell in each District Industries Centre in Tamil Nadu are being transformed into an "District Export Promotion Cell" in association with Federation of Indian Export Organisation (FIEO) to facilitate accelerated disposal of various clearances required by exporters

VII. State specific list of projects supporting exports, for example, cold storage, testing labs, etc.

Infrastructure development:

Recognising that world class infrastructure, both industrial and social, is a prerequisite for rapid industrialisation, the Government of Tamil Nadu aims at creating and upgrading the existing infrastructure to world standards. Towards this end, the Tamil Nadu Infrastructure Development Board, headed by the Hon'ble Chief Minister, has been constituted and the State has released the Vision 2023 Tamil Nadu document, outlining the growth trajectory for the next decade.

Tamil Nadu is already endowed with a relatively better infrastructure among the Indian states. However, rapid industrialisation and growing urbanisation require a further impetus to investment in infrastructure. Taking note of this, the State Government has initiated steps to address the issues of power availability, lands for industries, skilled manpower, roads and ports, industrial water etc. The following are the targets for capacity addition during the XII plan period:

- To invest not less than US \$ 30 billion, through private and public sectors, in infrastructure development
- To increase the power generation capacity adequately to meet the future demand by commissioning Mega and Ultra Mega Power Projects
- To establish a land bank of at least 53,000 acres throughout the State
- To augment industrial water supply
- To augment capacities for handling and safe disposal of industrial effluents and solid wastes
- To establish Corridors of Excellence: Industrial Corridor of Excellence between Madurai – Tirunelveli –Thoothukudi

- To improve Port connectivity; to upgrade the minor ports at Nagapattinam, Colachel, Cuddalore and Manappadu as major ports and to upgrade other ports as Intermediate ports

Some of the major initiatives to promote export-related infrastructure projects planned include:

Minor Port Development on PPP mode: 13 of the 23 minor ports in the State have been offered to the Private sector for establishment of captive facilities. The Government will facilitate up-gradation of the minor ports at Nagapattinam, Colachel, Cuddalore and Manappadu into all weather deep sea ports and the other ports as Intermediate ports.

Improving connectivity to sea ports: To improve connectivity, Government, following road connectivity projects are planned / implementation:

1. Northern Port Access road to connect Ennore Port and L&T Port to NH-5
2. Ennore-Manali Road Improvement project
3. Outer Ring Road and
4. Peripheral Road from Mahabalipuram to Ennore Port

Port connectivity: The Government in collaboration with the National Highways Authority of India (NHAI) and the Government of India will improve the connectivity to the Chennai and Ennore Ports. The Government will speed up the implementation of the Chennai Outer Ring Road Project (phase II) and the Northern Port Connectivity Road, providing a direct access to the Ennore and Kattupalli ports from the National Highways No. 5.

Multi-level car parking facility: Chennai port has become India's largest car export port. However, Chennai port faces space constraints for parking export vehicles. Hence, the Government will facilitate construction of Multi-Level Car Parking Terminals in all the seaports.

Container handling facilities in Ennore and Chennai ports: The Government will take up with Government of India to expedite establishment of the Container Terminal in Ennore Port and the Mega Container Terminal in Chennai Port.

Third Port for Chennai: Currently, M/s Larson & Toubro (L&T) in collaboration with TIDCO has established India's largest ship building facility along with a Port in Kattupalli, Ponneri taluk, north of Chennai. This Port also has container handling facilities apart from other berths and marine infrastructure including ship lifting required for ship building.

Rail link between Avadi and Guduvancherry : To provide rail link for the benefit of highly industrialised areas falling between Avadi and Guduvancherry and to decongest the area, the State Government and the Southern Railways

have initiated the process for establishment of broad-gauge rail link between Avadi and Guduvancherry passing through the important industrial areas in Sriperumbudur and Oragadam and with a spur line (1.5 Km) from Sriperumbudur to Irungattukkottai.

Strengthening Rail connectivity to Chennai and Ennore ports: The Government will take up de-bottlenecking the rail connectivity to Chennai and Ennore Ports for speedier movement of cargo to these ports.

Tamil Nadu Skill Development Corporation: The Tamil Nadu Skill Development Mission implemented through a society has been reorganised as a Special Purpose Vehicle (SPV) with participation from private sector under section 25 of the Companies Act, 1956 as a body corporate in the name Tamil Nadu Skill Development Corporation for providing skill training through different departments. Skill gaps will be identified and Upgradation programmes will be undertaken to meet the industry expectations. Particularly export-oriented industries like Textiles & Garments, Leather products, auto ancillaries, IT & ITES, etc.

Provision of waste disposal facilities: The Government will facilitate hazardous waste disposal facilities in all major Industrial parks and SEZs and common treatment & disposal of solid and liquid waste in industry clusters.

Promotion of desalination plants and waste water treatment and recycling plants: Developers of Industrial parks/ SEZs/ Industry clusters, etc. will be provided incentives to set up desalination plants/ waste water treatment and recycling plants.

In consultation with Chambers of Commerce, Export promotion Councils and Industry Associations, following export-related infrastructure projects have identified by the Government of Tamil Nadu for implementation during 12th Five year Plan period:

Tamil Nadu: Export-related Infrastructure projects identified:

1	SIPCOT – Establishment of Truck Terminals at SIPCOT Industrial Park, Irungattukkottai
2	SIPCOT – Industrial Growth Centre, Oragadam
3	AMRL Nanguneri SEZ – Provision of External Water Connectivity from Tamirabarani river to SEZ boundary
4	CCCL Pearl City Food Port SEZ Ltd – Widening of the existing road – Other District Road into two lane road
5	Avadi – Sriperumpudur – Oragadam – Guduvancheri – Railway Link Project
6	Tertiary Treatment & RO facility for supplying treated sewerage water to industrial cluster connected to exports near Chennai
7	Northern Port Connectivity Roads (to Ennore Port) – Link Road between cluster & truck terminals along the road and main corridor
8	Formation of mega Leather Clusters

9	Cold Chain Infrastructure / Ware houses in centres of production and airports
10	Minor Port Development
11	Automobiles Training Centre (Skill Development) near Chennai
12	Textile Park development
13	Integrated food irradiation & Service facilities, near Chennai
14	Non-carbonated fruit drink facility in Perambalur District
15	Hindustan Life care Ltd., - Biotechnology project, near Chennai
16	Common Facilities Centre for Design, prototyping Centres, Tool Rooms etc for various clusters. (i) Automobile (ii) Aero space (iii) Engineering
17	Common testing facilities for physical – chemical, toxicological, eco toxicological testing for chemical industries
18	Special storage at Sea Port and Airport (Rs.10 Crore each)
19	Skill development centres for engineering clusters
20	Testing facilities for sample testing for export items
21	Common testing centre for pharma clusters
22	Common infrastructure for Herbal industrial park / medicinal park
23	Setting up of physical incubator to technology platforms, test labs etc for TICEL Bio Park expansion project
24	Setting up of incubator /innovation etc for TIDEL Park Coimbatore
25	Common facilities for Electronic Hardware Park
26	Water Treatment Plant at Namakkal Poultry clusters
27	Technological Upgradation for Textile Processing and Design Research Institute in line with CLRI
28	Common facilities for dry port facilities near Chennai
29	Common Infrastructure for Aero space park in Sriperumbudur / Ennore
30.	Common infrastructure for MRO facility at Meenambakkam, Chennai
31	Common infrastructure for Cashew Export Processing Units
32	Independent railway siding between Attipattu/ Attipattu Pudunagar to Kattupalli port
33	Cold storage facilities for storing of Eggs in Namakkal District
34	Common infrastructure for Foundry industries
35	Common Processing Facility for Mineral Store Units
36	Common Water Supply / STP / ETP for SEZ in Krishnagiri District
37	Cold Storage Facility for Krishnagiri Mango pulp / processing units
38	Infrastructure Facilities for Export Trade Promotion Centre
39	Training cum incubation centre for women Bio Park near Chennai
40	Development of Marine Biopark, near Chennai
41	Common Infrastructure for Vaccine Park near Chennai
42	Fish landing Infrastructure in Costal Area
43	Cold Storage / Processing Facility for Export Oriented Precision Farming (Horticulture)
44	Infrastructure Facilities for Hybrid Seed Production for exports
