



# ASSOCHAM'S GUJARAT VISION DOCUMENT

*STRATEGIC COLLABORATION FRAMEWORK FOR ECONOMIC,  
INDUSTRIAL & GLOBAL LEADERSHIP*



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# Executive Summary

Gujarat's economic trajectory represents a paradigm shift in India's industrial landscape. This collaboration framework between the Associated Chambers of Commerce and Industry of India (ASSOCHAM) and the Government of Gujarat establishes a strategic blueprint for positioning the state as a cornerstone of India's Vision 2030: The Global Gateway initiative.

The state's economy demonstrates remarkable resilience and diversity. Contributing nearly 18% to India's manufacturing GDP, Gujarat has emerged as the industrial powerhouse that drives national growth. The state's Gross State Domestic Product continues to outpace national averages, reflecting sound macroeconomic fundamentals and progressive industrial policies.

Gujarat's strategic transition marks a critical inflection point in its development philosophy. The state has evolved from serving primarily as a facilitator of global trade to establishing itself as a High-Tech Manufacturing and Innovation Hub. This transformation encompasses advanced manufacturing capabilities, technology adoption, and the creation of specialised industrial ecosystems that attract global investments.

## STATISTICS

1. GSDP ~Rs 29.82 trillion (FY26) as per IBEF;
2. Gujarat accounts for ~26.6% of India's exports (FIEO);
3. FDI inflows ~Rs 4.08 lakh crore from 2019–June 2025 (DPIIT)
4. The state accounts for around 72% of the world's share of processed diamonds and more than 80% of diamonds processed in India

## HIGHLIGHTS

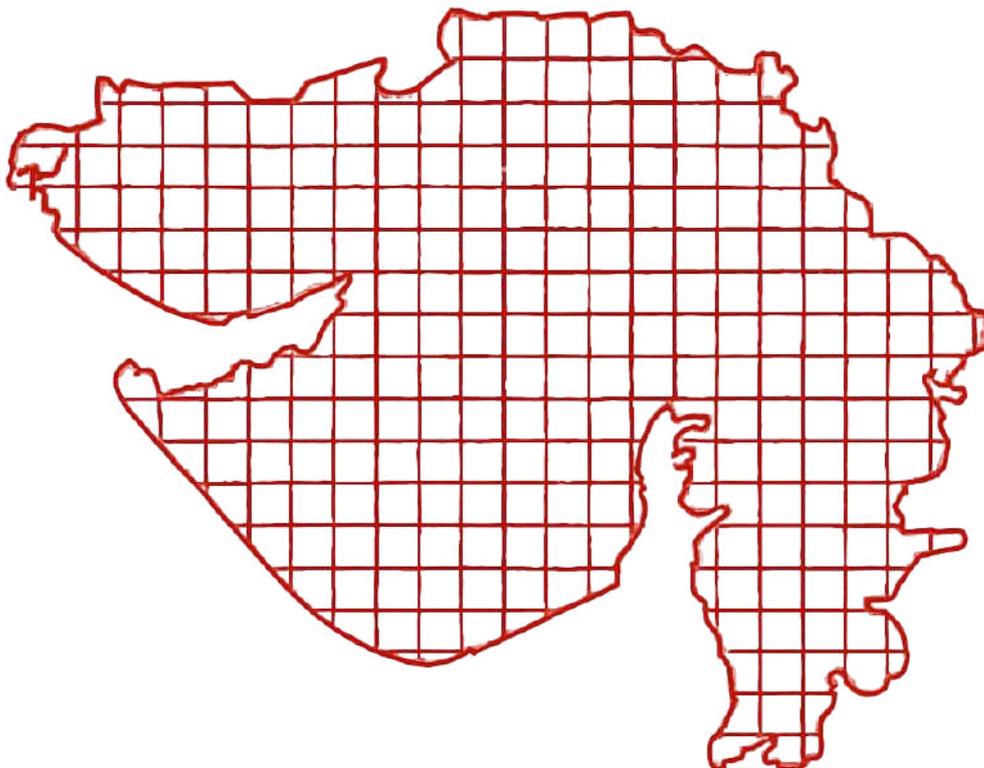
1. Robust port infrastructure handling substantial cargo volumes.
2. Strategic geographic location with extensive coastline.
3. Diversified manufacturing base spanning petrochemicals, automotive, textiles and emerging technology sectors.
4. Progressive industrial and investment policies attracting sustained FDI.
5. Strong partnership ecosystem between industry and government, fostering innovation.
6. Stable and Proactive Policymakers.

ASSOCHAM has maintained a distinguished partnership with state governments across India, functioning as a bridge between policy formulation and industry requirements. The chamber's engagement extends beyond traditional advocacy, encompassing collaborative frameworks that enable both corporate expansion and state-level economic development. Through structured dialogues, policy recommendations, and capacity-building initiatives, ASSOCHAM has facilitated the alignment of industrial growth with sustainable development objectives.

The Gujarat collaboration framework focuses on sector-specific interventions across agriculture, manufacturing, services, and emerging technologies. It recognises the state's competitive advantages while identifying opportunities for enhancement in infrastructure, skill development, and regulatory efficiency. This partnership aims to create an enabling environment where businesses can scale operations while contributing to inclusive economic growth.

The framework adopts a collaborative governance model. It emphasises stakeholder consultation, evidence-based policy formulation, and implementation monitoring. By leveraging ASSOCHAM's pan-India network and Gujarat's institutional capabilities, this partnership seeks to establish replicable models of state-industry collaboration

New sectors are adding to Gujarat's industrial composition. Next Gen Sectors, including Semiconductor manufacturing; Energy Transition, including Green hydrogen production; a complete suite of IT & ITeS; Fintech services; Aerospace and Defense Manufacturing, Data Centres, and advanced materials, represent the next frontier of growth. These sectors complement the state's traditional strengths in petrochemicals, textiles, and automotive manufacturing, creating a diversified economic base resilient to global market fluctuations.



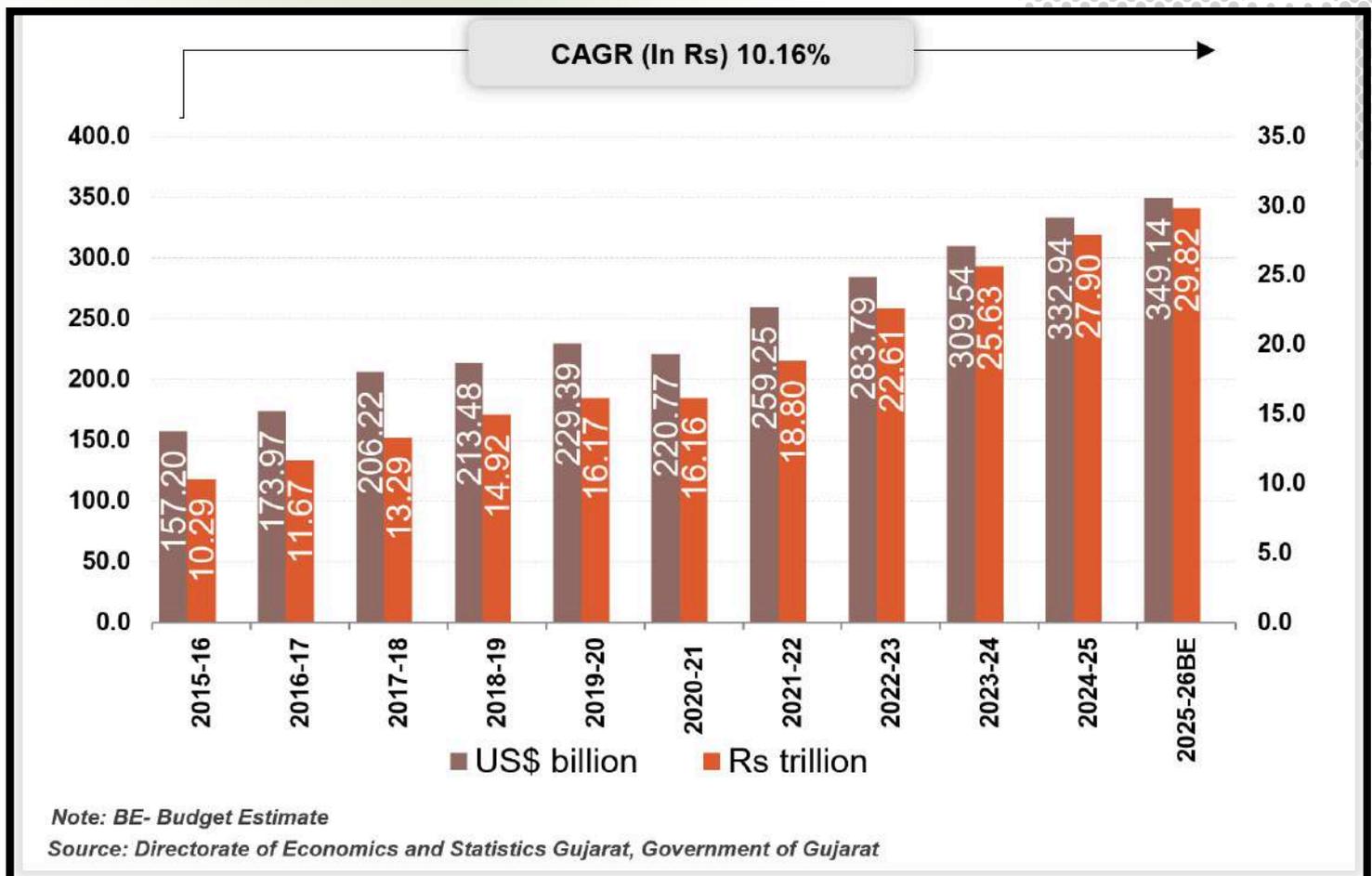
# ECONOMIC SNAPSHOT

## MACROECONOMIC RESILIENCE



Gujarat's macroeconomic fundamentals demonstrate consistent strength across multiple indicators. The state's Gross State Domestic Product has maintained a compound annual growth rate exceeding the national average over the past decade, reflecting sustained economic expansion and effective resource utilisation. This performance positions Gujarat as a critical contributor to India's overall economic growth trajectory.

## GSDP OF GUJARAT AT CURRENT PRICE



Export performance constitutes a defining feature of Gujarat's economy. The state accounts for over 30% of India's total merchandise exports, establishing its role as the nation's premier gateway for international trade. This export orientation has fostered global competitiveness among Gujarat-based enterprises and created deep integration with international value chains across pharmaceuticals, chemicals, textiles, and engineering goods.

The path forward emphasises leveraging Gujarat's established strengths while addressing emerging opportunities. Priorities include enhancing manufacturing value addition, expanding services exports through specialised zones, and strengthening backward linkages to maximise domestic content. The state's economic resilience provides a foundation for ambitious growth targets aligned with national objectives of self-reliance and global competitiveness.

- Consistent above-national-average growth in GSDP
- Dominant position in India's export basket
- Diversified export portfolio across goods

- Strong fiscal management and revenue capacity; Sustained private sector investment inflows.



~10.16%

10-year GSDP  
CAGR ~10.16% (IBEF)

~26.6%

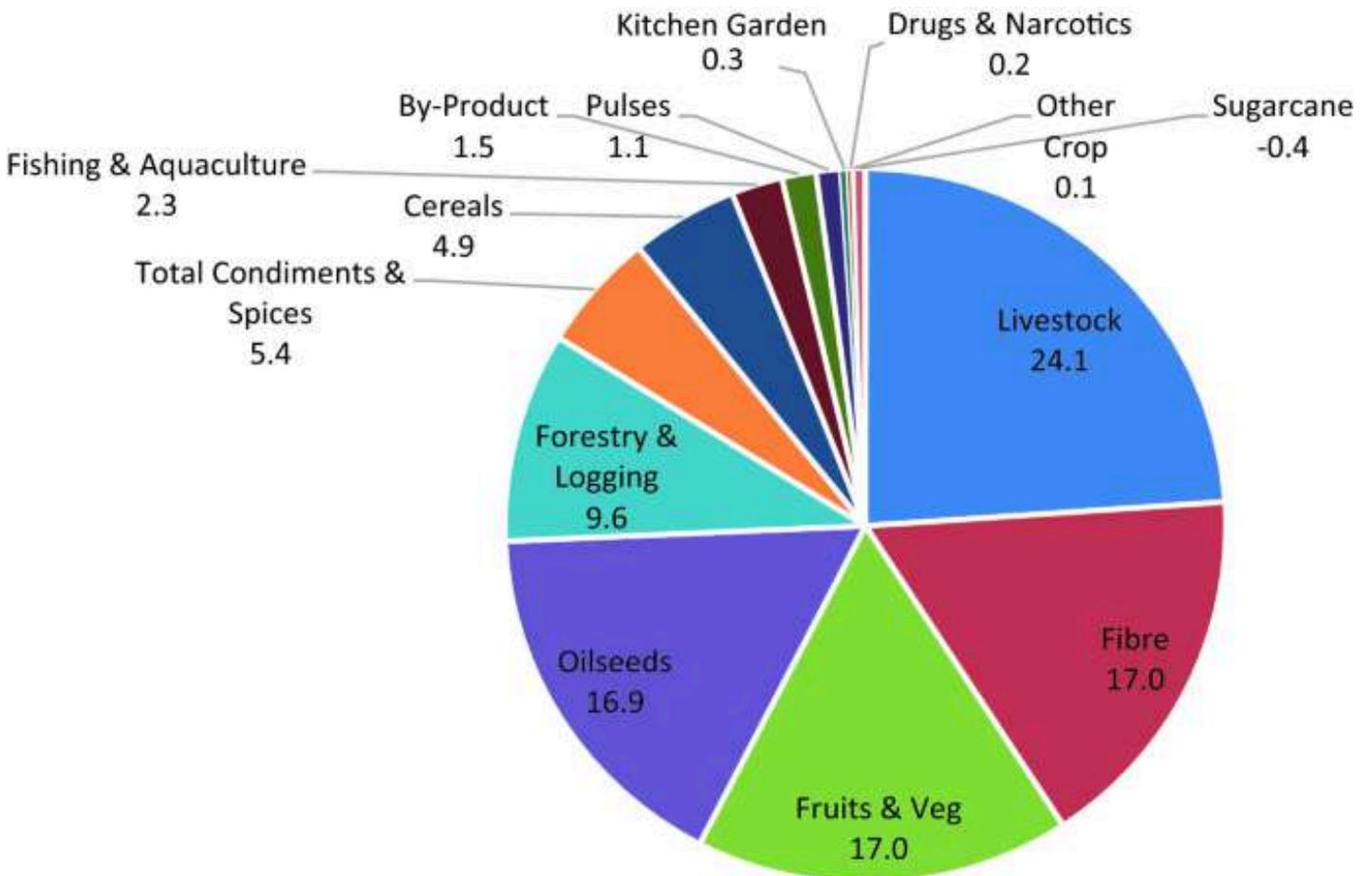
Exports ~Rs 9.83 lakh crore, ~26.6%  
of India's total (FIEO)

~Rs 273,558

Per capita NSDP ~Rs 273,558 (IBEF)

# PRIMARY SECTOR: AGRICULTURE & BLUE ECONOMY

Gujarat has emerged as a leader in agricultural innovation, transforming traditional farming through technology adoption and scientific practices. Mehsana district of Gujarat exemplifies such a global transformation serving as a hub for dairy excellence where Amul's cooperative model revolutionised India's milk economy.



Recent innovations in the field of Precision farming technologies, micro-irrigation infrastructure, and agri-tech platforms are enabling farmers to optimise resource utilisation while improving productivity and income stability.

The state's approach to agriculture emphasises efficiency and sustainability. Capital Intensive Projects like Sardar Sarovar, Large Diameter Water Pipelines stretching across the State, along with the rejuvenation of Water Bodies continues to give large-scale socio-economic benefits to the State. Gujarat's extensive micro-irrigation coverage, spanning hundreds of thousands of hectares, demonstrates a commitment to water conservation in agriculture. The State Government continues to invest heavily in Agri Infrastructure. This infrastructure, combined with soil health management programs and crop diversification initiatives, positions Gujarat to share best practices with other agricultural regions while learning from specialised systems such as Mizoram's shifting cultivation adaptations.

Gujarat's coastal advantage creates unique opportunities in the blue economy. The state's fishing harbours, marine products processing facilities, and proximity to major consumption markets establish a comprehensive value chain from farm to consumer. Port connectivity enables efficient export of agricultural commodities, while cold chain infrastructure ensures quality preservation. These integrated advantages position Gujarat's agricultural sector for sustained growth in domestic and international markets.

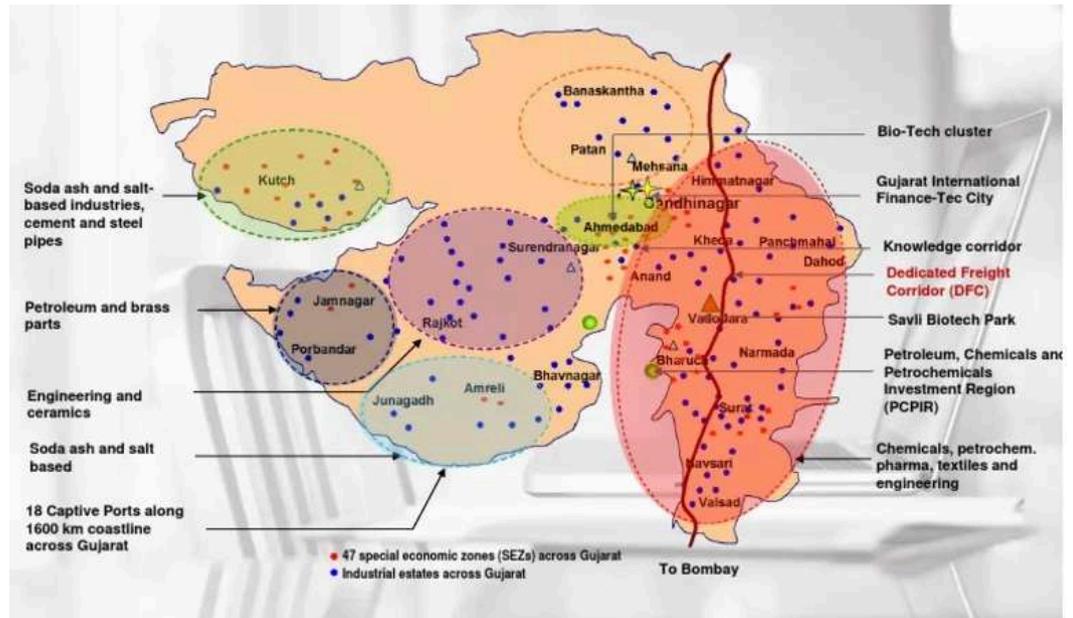
## HIGHLIGHTS

- Extensive micro-irrigation infrastructure boosts productivity.
- Strong cooperative movement in dairy (e.g. Amul).
- Advanced cold chain and post-harvest facilities.
- Integrated port linkages enabling agri-exports.
- Diversified cropping with high-value horticulture.
- Micro-irrigation coverage (hectares) and Milk production volume rankings at the highest as per FAO & GOI.
- Total Fish production export values increased in recent years.

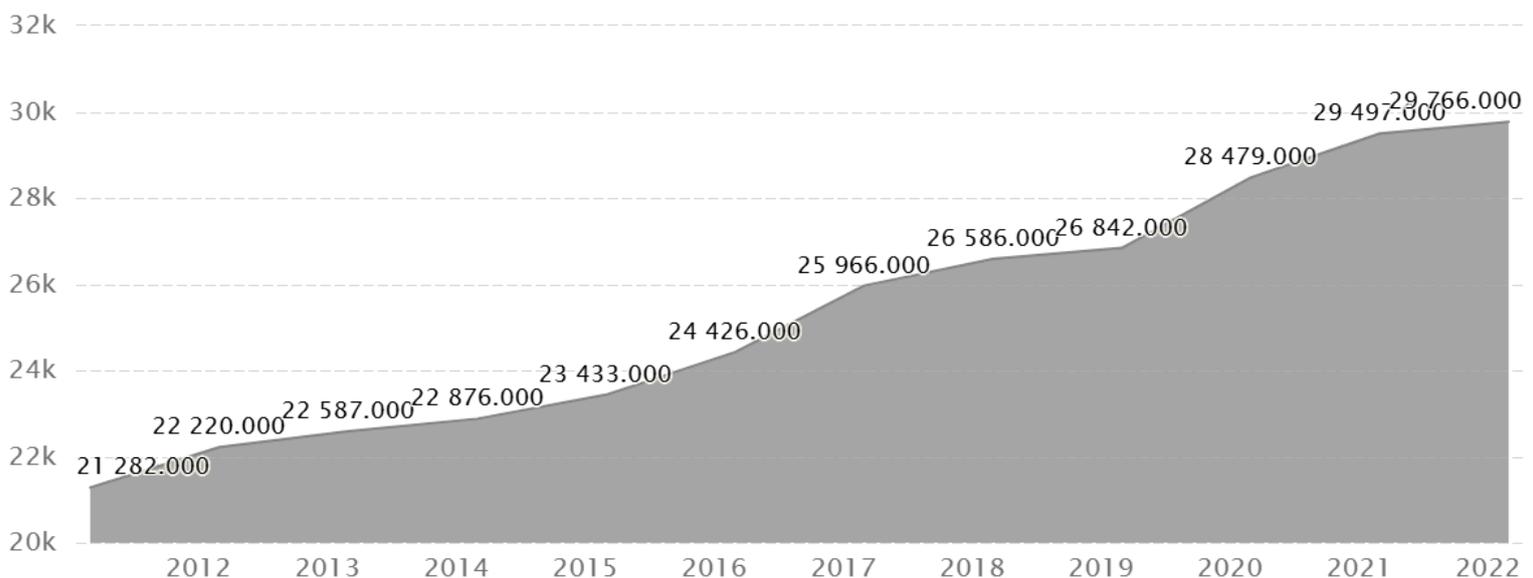


# INDUSTRIAL SECTOR: PROMINENT BELTS

Gujarat is the Industrial Powerhouse of India, contributing to nearly 18% of India's Industrial Output with only 5% of India's Population. Industry-ready infrastructure, a robust MSME Sector, and an enterprising citizenry, supported by proactive policymakers, continue to drive the State's industrial growth. Gujarat's industrial architecture revolves around specialised belts that concentrate sector-specific capabilities.



The Sanand-Mandal-Becharaji corridor has evolved into a comprehensive automotive ecosystem where global manufacturers deploy advanced production technologies. Simultaneously, the Dahej-Ankleshwar belt, designated as a Petroleum, Chemicals and Petrochemicals Investment Region, represents India's largest concentration of chemical processing capabilities. These clusters benefit from shared infrastructure, skilled labour availability, and supplier networks that enhance competitiveness.



■ Manufacturing Industries: Gujarat: Factories

SOURCE: WWW.CEICDATA.COM | Ministry of Statistics and Programme Implementation

Gujarat has taken a leadership role in Energy Transition and today with nearly 42.58 GW as on December 2025 accounts for nearly 16.5% of the Renewable Energy Capacity Installed in India. Renewable energy represents Gujarat's forward-looking industrial strength. Gujarat with its ambitious target to achieve 100+ GW of Installed Renewable Capacity by 2030 continues to invest in the all spectrum of the Sector.. Renewable energy infrastructure not only supports sustainability objectives but also provides industrial consumers with reliable, competitively-priced power, enhancing overall manufacturing competitiveness. With the enforcement of Carbon Border Adjustment Mechanism (CABM) by European Union, Industries of Gujarat can have a distinctive advantage in EU Markets.

### HIGHLIGHTS

- Concentrated automotive manufacturing ecosystem
- Largest petrochemical processing capacities
- Integrated textile value chain
- Established renewable energy infrastructure
- Specialised industrial parks with sector-focused facilities.

### STATISTICS

- Annual automotive production volumes doubled in last ten years (SIAM)
- Chemical capacity PCPIR have witnessed a surge
- Solar + wind capacity (GW) risen with govt's focus on renewables

# INFRASTRUCTURE & DIGITAL CONNECTIVITY

Gujarat's maritime heritage, originating from ancient Lothal, finds modern expression in world-class port infrastructure. The state operates multiple major ports and numerous minor ports, collectively handling substantial cargo volumes that exceed those of many Indian states combined. Initiatives to expand port capacity, improve turnaround times, and develop specialised terminals position Gujarat to capture growing containerised and bulk cargo traffic as India's trade expands.

GIFT City represents an innovative approach to creating international financial services infrastructure. This specialised zone provides global regulatory standards, advanced digital infrastructure, and integrated business environments. Complementing physical infrastructure, Gujarat is expanding digital connectivity with focused programmes to enhance broadband penetration in rural areas, bridging the urban-rural digital divide.

## HIGHLIGHTS

- Extensive port infrastructure with strategic positioning
- Dedicated freight corridors linking industrial hubs
- GIFT City as a financial and digital gateway
- Expanding broadband in rural regions
- Integrated logistics parks are reducing lead times.

~40%

Ports handle ~40% of India's ocean cargo

~886

GIFT City ~886 acres with ~550 operational entities

Dedicated freight network length (DFCCIL)



# EDUCATION & SKILL DEVELOPMENT

Gujarat has established specialised educational institutions addressing emerging sector requirements. The National Forensic Sciences University, Rashtriya Raksha University, and maritime academies provide domain-specific expertise aligned with industry needs. These institutions complement traditional universities in creating a diverse talent pool equipped with both theoretical knowledge and practical skills.

Skill development initiatives focus on improving employability through industry-aligned training programs. The state's emphasis on technical specialisation has produced a workforce capable of supporting advanced manufacturing and services sectors. Literacy rates, combined with targeted vocational training, create a foundation for continuous skill upgradation as industries evolve.

**~100,000+**

Engineering graduate output  
~100,000+ annually (GIFT  
Talent Report)

**~78.03%**

Literacy rate ~78.03% (IBEF)

Enrollment figures in  
specialised institutions

## HIGHLIGHTS

- Extensive port infrastructure with strategic positioning
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- Expanding broadband in rural regions
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# INVESTMENT LANDSCAPE: FDI INFLOWS & VIBRANT GUJARAT IMPACT

Gujarat has consistently attracted substantial foreign direct investment, capturing a significant percentage of India's total FDI inflows. This performance reflects investor confidence in the state's industrial ecosystem, regulatory environment, and growth prospects. Sectoral diversification in FDI, spanning manufacturing, services, and infrastructure, indicates broad-based appeal across industries.

The Vibrant Gujarat Summit series has established itself as a premier investment promotion platform. Beyond announcement of Memoranda of Understanding, the summit's impact is measured through implementation rates, where Gujarat demonstrates notable success in converting commitments into operational projects. This track record of execution distinguishes Gujarat from investment promotion efforts that achieve announcements without commensurate on-ground realisation.

Investment facilitation mechanisms, including single-window clearances and dedicated support structures, reduce implementation timelines and regulatory complexities. These systems enable investors to navigate approvals efficiently, reducing time from project conceptualisation to commissioning. The state's approach emphasises handholding throughout the investment lifecycle, from initial inquiry through operational stabilisation.

Emerging sectors are receiving targeted investment promotion. Semiconductor manufacturing, green technologies, and advanced materials represent areas where Gujarat is positioning itself as a preferred destination. Policy incentives, infrastructure availability, and ecosystem development efforts aim to capture first-mover advantages in these high-growth sectors.

## 2019-2025

FDI ~Rs 4.08 lakh crore to Gujarat  
(2019-2025)

## MoU

Vibrant Gujarat MOU values and  
conversion rates

## 10 Years

Number of foreign-invested  
manufacturing units witnessed  
increments in last 10 years

## HIGHLIGHTS

- High FDI inflows across sectors
- Strong MOU conversion and project implementation
- Efficient single-window clearance mechanisms
- Proactive investor support services; Diverse sectoral FDI distribution reducing risk.

# POLICY SUGGESTIONS & ROADMAP: EASE OF DOING BUSINESS 2.0

Regulatory reform represents a continuous priority for enhancing business competitiveness. The Government of Gujarat, in the last decade, has transformed red tape into a red carpet by incorporating feedback from all stakeholders. The Government of Gujarat has taken all necessary initiatives to rationalise the number of required approvals, consolidate filings, implement risk-based inspection regimes and lower transaction costs for businesses across sectors. The EODB approach by the Government of Gujarat follows a consultative approach along with stakeholders, wherein the inputs of all key stakeholders are taken into consideration, and the regulatory framework is continuously evolved based on challenges faced by the stakeholders.

With the continuously changing Business landscape and federal competition among the States of India, Gujarat policymakers are once again focused on further rationalising the Regulatory Requirements and balancing the requirements of all stakeholders.

## The Ease of Doing Business

The 2.0 framework proposes to focus on further rationalising compliance requirements, simplification of Regulatory Understanding, Using Global Best practices and extensive utilisation of Information Technology for transparent processes.

Vibrant Gujarat 2.0 envisions a strategic recalibration of investment attraction efforts in next Gen Industries. This includes sector-specific targeting, enhanced focus on foreign institutional investors, and creation of specialised ecosystems for emerging technologies. The approach emphasises quality over quantum, prioritising investments that create technological capabilities, employment, and value addition.



## HIGHLIGHTS

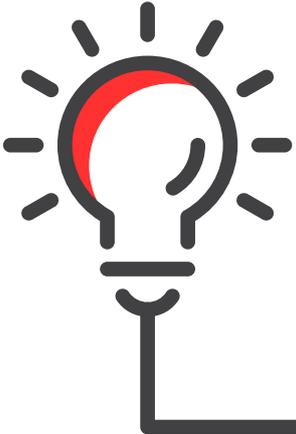
- Progressive reduction in compliance requirements
- Functional single-window systems
- Policy focus on emerging sectors like green hydrogen
- Stable regulatory environment
- Digital platforms for regulatory interactions.

## STATISTICS

- Ease of Doing Business ranking among Indian states
- Average single-window clearance timelines

## ASSOCHAM PROPOSAL TO FURTHER TO STRENGTHEN THE "SINGLE WINDOW CLEARANCE" TO EXPEDITE PROJECT EXECUTION IN THE STATE AND EASE OF OPERATION FOR INDUSTRIES

- Rationalisation of land- and Revenue-related Regulations for new Industrial set up and rationalisation of timelines for all approvals. Parallel Processing of multiple applications against the present sequential processing of approvals.
- Integration of Infrastructure and service requirements from various utilities, including Electricity / Natural Gas / Water / Road Access among others.
- Integration of Various Labour and Factory Compliances, Fire Department Approvals, Pollution Control Board Approvals, among others, are to be integrated.



## DISTRICT-LEVEL VARIATION

### Ahmedabad, Surat, Vadodara:

Efficient, investor-friendly

### Smaller districts:

Slower processing

Limited digital adoption

Higher dependence on officials

## WHAT GUJARAT NEEDS NEXT (NEXT-GEN EODB REFORMS): TO STAY AHEAD OF OTHER STATES (UP, TN, KARNATAKA), GUJARAT WOULD NEED

### Policy level

- Deemed approvals within fixed timelines
- Unified compliance return (one annual filing)
- Risk-based inspection system

### Technology level

- API integration of all departments
- Real-time application tracking dashboard
- AI-based document validation

## ENVIRONMENTAL CLEARANCES

### Gujarat PCB is relatively faster than many states, but:

1. Consent to Establish (CTE) and Consent to Operate (CTO) timelines fluctuate.
2. Compliance documentation is heavy for MSMEs.
3. Site inspections are still manual.

**Need:** risk-based auto approvals for low-pollution sectors.



# FINTECH & GLOBAL SERVICES GIFT CITY EXPANSION



The Gujarat International Finance Tec-City positions Gandhinagar as a competitive alternative to established financial centres such as Singapore and Dubai. GIFT City's regulatory framework, based on global best practices, offers international financial institutions an Indian operational base under familiar regulatory paradigms. The International Financial Services Centre enables trading, asset management, insurance, and banking services under a consolidated regulatory structure. GIFT City targets bridging the missing link for the growth of the Indian Financial and Regulatory market, creating a unique opportunity for Global Players with Best in Class Infrastructure, Large Pool of extremely talented manpower, Vibrant, supportive Social Infrastructure, Predictive and supportive Regulatory Framework.

Operational metrics demonstrate GIFT City's growing traction. Daily trading volumes on IFSC exchanges, the number of global financial institutions with physical presence, and assets under management reflect increasing adoption. The zone's appeal extends beyond cost advantages to encompass regulatory certainty, talent availability, and proximity to India's growing financial markets.

The strategic vision for GIFT City emphasises ecosystem completeness. Beyond financial services, the development incorporates residential areas, educational institutions, and lifestyle amenities, creating an integrated township. This holistic approach addresses quality-of-life factors that influence talent attraction and retention, particularly for globally mobile professionals.

Future expansion focuses on specialised financial services, including aircraft leasing, bullion trading, and wealth management. Each of these segments benefits from the IFSC regulatory framework while serving distinct client bases. The objective is to establish GIFT City as a comprehensive financial services destination rather than a narrowly focused special zone.

Connectivity, both physical and digital, enables GIFT City's global integration. Advanced telecommunications infrastructure, international airport proximity, and digital payment systems facilitate seamless interaction with global markets. The zone's positioning within India's time zone provides operational advantages for serving both Asian and European markets.

## HIGHLIGHTS

- International regulatory framework within Indian jurisdiction
- Growing number of global institutions in IFSC
- Integrated township combining work & residential life
- Strategic geographic and time-zone advantages
- Expanding trading volumes on IFSC exchanges.

## GIFT CITY

GIFT City ~886 acres, ~550+ entities

## 20 YEARS

GIFT City tax holiday extended to 20 years

## \$100BN

Banking assets have touched collectively \$100bn



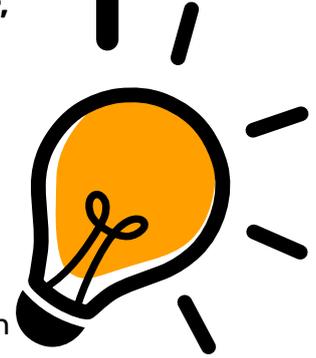
## **FUTURISTIC MEASURES THAT CAN BE LOOKED AT**

**A.** Tax certainty in GIFT City exists and is attractive, especially for financial institutions, aircraft leasing, and offshore funds. But it is, targeted, evolving, and time-bound – not yet the permanent, fully predictable system that global hubs like Singapore or London offer.

<b>FACTOR</b>	<b>GIFT CITY</b>	<b>SINGAPORE</b>	<b>LONDON</b>
Tax holiday	Time-bound	Long-term stable	Stable regime
Capital gains	Sector-specific exemptions	Broad clarity	Mature framework
Withholding tax	Concessional	Predictable	Predictable
Policy horizon	10–15 years	20–30 years	Institutional stability

**B. IFSCA is primarily a unified regulator; however, in future, through the next phase of reforms, further operational independence may be looked at -**

- Clear legal primacy of IFSCA inside IFSC
- Automatic regulatory recognition by RBI/SEBI/IRDAI
- Independent capital and forex rule-making within IFSC
- Single licensing interface with no parallel approvals



**C. To be among leaders such as London/Singapore, a government-planned “International Arbitration Centre”, and to be more active.**

There is some work on the ground, such as the Union Budget 2022, which proposed setting up an International Arbitration Centre at GIFT City. IFSCA confirmed it is working on the proposal and framework. Expert committees have already drafted rules and architecture for the proposed centre. However, for GIFT to match Singapore/London arbitration ecosystems, it still needs:

- Specialised commercial courts in the IFSC
- Independent arbitration law environment
- Large global law firm ecosystem
- Global enforcement track record



# SEMICONDUCTORS & NANO-TECH: MANUFACTURING ECOSYSTEM

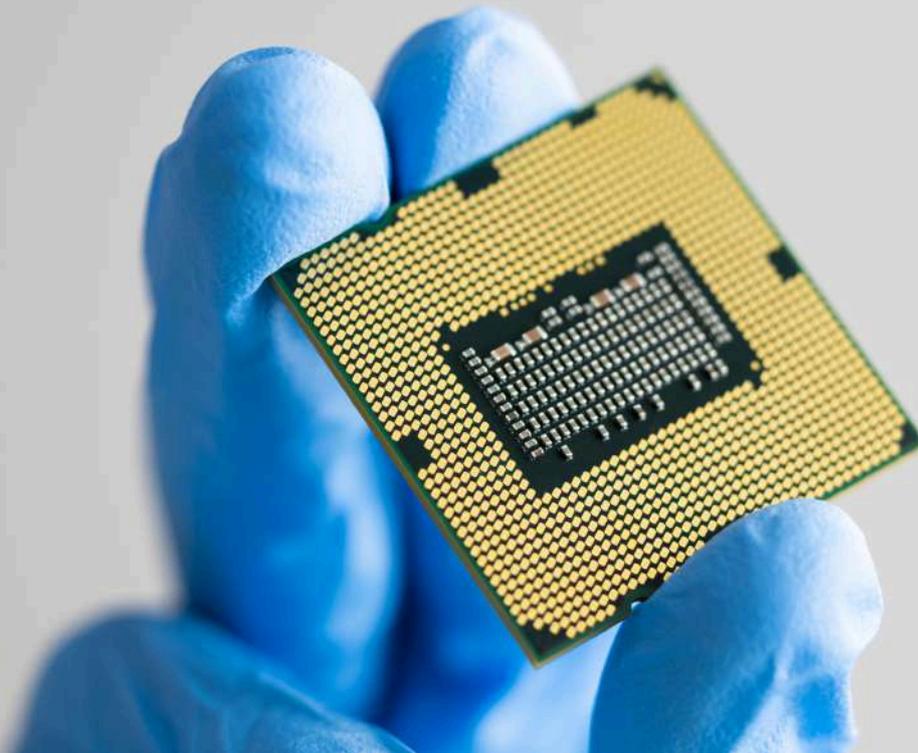
Gujarat's semiconductor ambitions center on establishing comprehensive manufacturing capabilities spanning the entire value chain. The Dholera Special Investment Region provides land, infrastructure, and regulatory support for semiconductor fabrication facilities. Projected investments running into multiple billions of dollars indicate serious commitments from global and domestic players attracted by policy incentives and market access.

The semiconductor ecosystem requires more than fabrication facilities. Supporting industries including specialty chemicals, ultra-pure water systems, precision components, and testing equipment must develop in parallel. Gujarat's existing chemical industry provides foundational capabilities while targeted investments address specialised requirements. The objective extends beyond assembly operations to encompass design, fabrication, and testing capabilities.

India's semiconductor consumption continues growing rapidly, driven by electronics manufacturing, automotive applications, and digital infrastructure. Gujarat's ambition to capture over 20% of India's semiconductor output by 2028 reflects both opportunity scale and competitive intensity. Success requires sustained policy support, infrastructure investments, and talent development alongside private capital commitments.

Nano-technology applications across materials science, healthcare, and electronics represent adjacent opportunities. Research institutions within Gujarat are developing capabilities in nano-materials, with potential applications in energy storage, water purification, and advanced composites. Translating research into commercial applications requires bridging mechanisms connecting academia with industry.

The transition from silicon wafers to finished chips involves complex manufacturing processes, each requiring specialised expertise and equipment. Gujarat's approach emphasises creating an enabling environment where global technology leaders find it advantageous to establish operations. This includes intellectual property protection, skilled workforce availability, and reliable infrastructure alongside financial incentives.



## HIGHLIGHTS

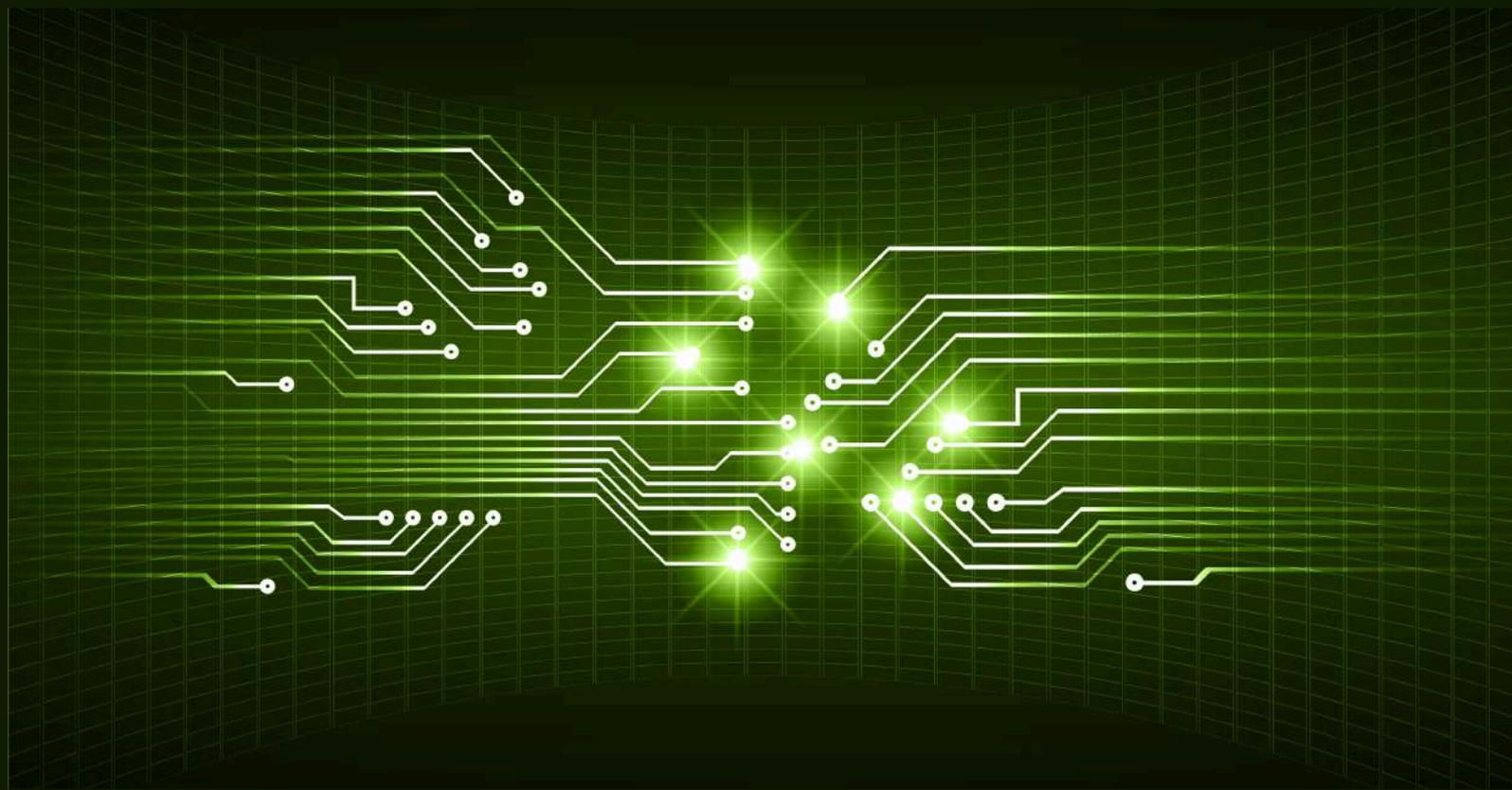
- Dedicated infrastructure provision in Dholera SIR
- Multi-billion dollar semiconductor commitments
- Existing chemical industry foundational capabilities
- Policy framework supporting the ecosystem
- Adjacent nano-technology research potentials.

**~Rs 40,000**

India Semiconductor Mission budget ~Rs 40,000 crore & \$1.25 lakh crore investments in Dholera (Times of India)

**2028**

Target share >20% of India's output by 2028



# CONCLUSION

## Co-Creating Gujarat's Next Chapter: From Blueprint to Partnership

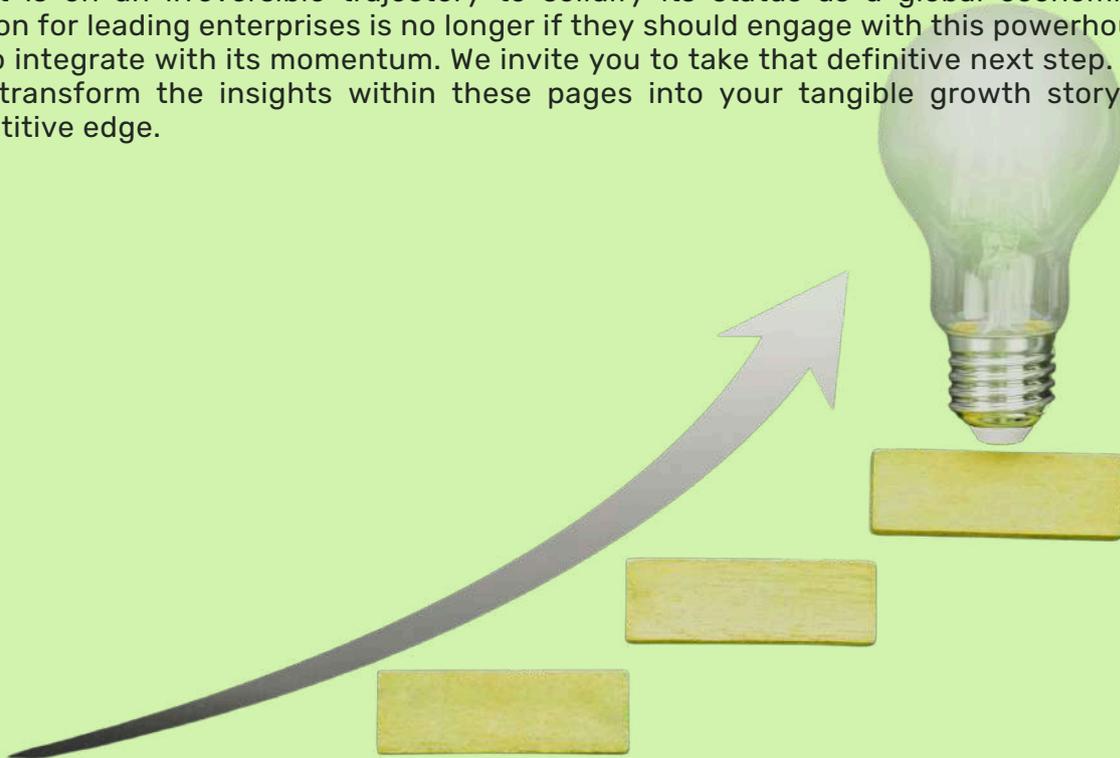
Gujarat is not just a destination for investment, but a proven platform for exponential growth. Having moved beyond mere potential to performance, showcasing an ecosystem where policy predictability, world-class infrastructure, industrial depth, and future-focused vision converge to create unmatched competitive advantages. From the manufacturing prowess of the Delhi-Mumbai Industrial Corridor to the financial innovation of GIFT City, and from its renewable energy leadership to its semiconductor readiness, Gujarat is engineered not merely to host businesses, but to propel them.

Yet, for the discerning global investor, the true question often lies beyond the "what" and resides in the "how." How does one navigate this dynamic landscape to identify the precise opportunity aligned with their strategy? How does one accelerate from intent to operation in a new and complex environment? This is where ASSOCHAM's guiding role comes - a trusted partner on the ground.

The mandate is to translate Gujarat's macro-promise into your micro-success. We offer more than data—we provide context; more than contacts, we cultivate relationships. Through privileged access to policy frameworks, structured dialogues with state leadership, and granular, sector-specific intelligence, we ensure your due diligence is thorough and your market entry is seamless. Think of us as your embedded intelligence unit and navigator within one of the world's most promising growth economies.

Therefore, we extend a specific and actionable invitation. Let us move from abstract analysis to concrete planning. We propose to organise a confidential, tailored engagement for your leadership team. This could take the form of a deep-dive briefing with our sector specialists, a curated interaction with key government facilitators, or a strategic site visit to the industrial clusters relevant to your enterprise. Our objective is singular: to co-create a roadmap that aligns Gujarat's formidable assets with your unique ambitions.

Gujarat is on an irreversible trajectory to solidify its status as a global economic node. The question for leading enterprises is no longer if they should engage with this powerhouse, but how best to integrate with its momentum. We invite you to take that definitive next step. Partner with us to transform the insights within these pages into your tangible growth story and lasting competitive edge.



## HIGHLIGHTS

- Strong industrial and investment base ready for future sectors
- Progressive policy intent fostering high-value growth
- Structured partnerships with industry for measurable outcomes
- Enhanced export competitiveness and skilled employment
- Leadership in emerging sectors like semiconductors and fintech.

**8.3%**

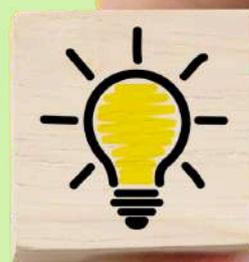
GSDP share of nearly 8.3% of India's GDP

**26.6%**

Export leadership ~26.6%

**FDI**

FDI inflows and project execution data





# ASSOCHAM<sup>®</sup>

— • Ideate • Innovate • Impact • —

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