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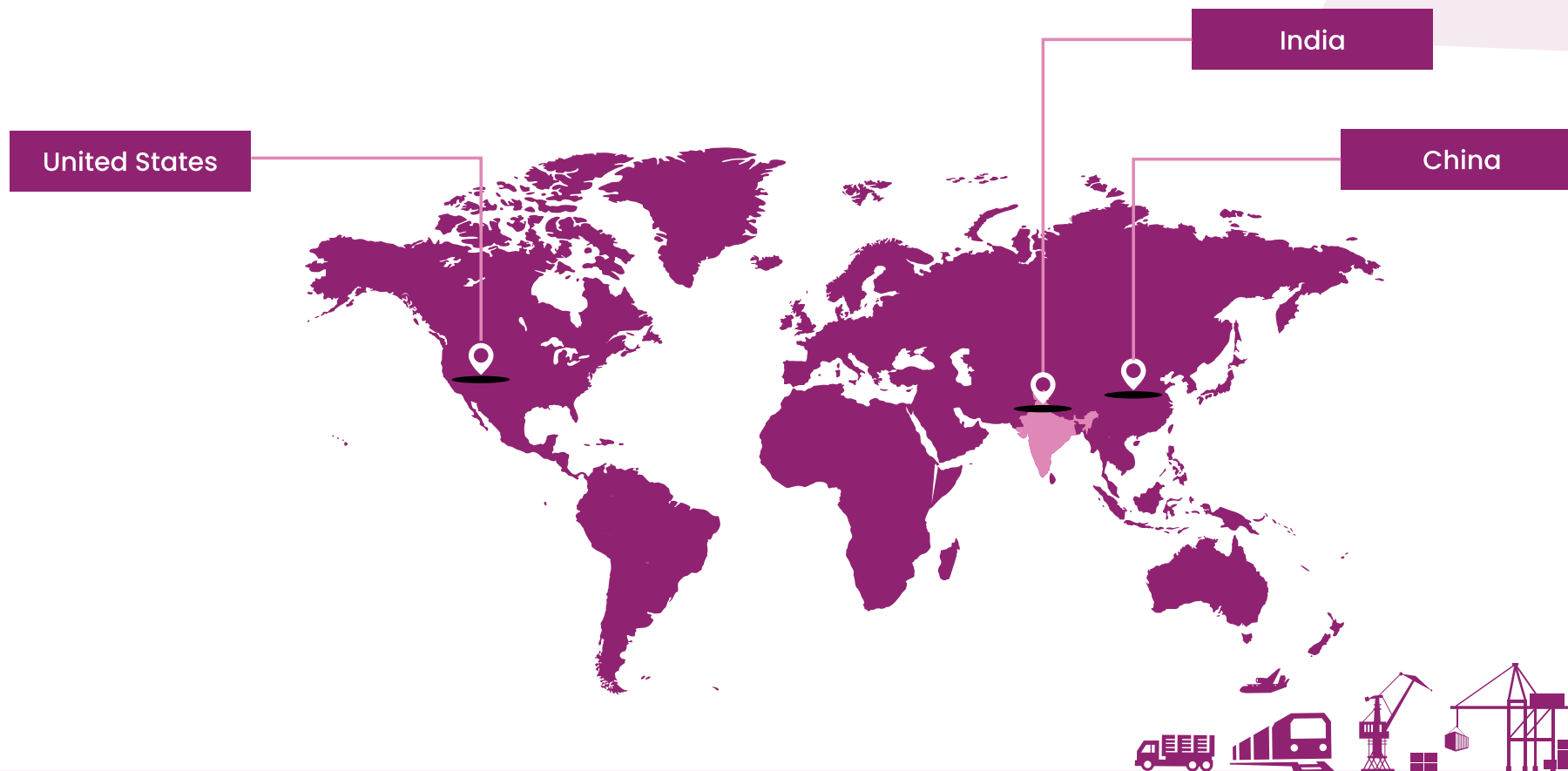
Logistics and Warehousing

MADHYA PRADESH THE FUTURE READY STATE



Global Scenario of Warehousing & Logistics Market

- ▶ In 2021, the global logistics industry recovered from the COVID-19 pandemic hit with market size of approximately US dollar 9.53 billion
- ▶ The logistics industry scale is Projected to reach US dollar 13.32 trillion by 2027 (With a CAGR growth of 6.5 % between FY 2020-2027)
- ▶ Major global Markets in this sectors are



India Scenario of Warehousing & Logistics Market

• The size of the Indian logistics market was around Us dollar 410.75 billion in FY 2022

• 62% growth in volume seen in Warehousing Market in FY 2022

• The Indian Logistics market would grow to Us dollar 556.97 billion by 2027, at (6.28% CAGR) annually

• Cost of Logistics in India is 14% of GDP against 11% of BRICS country average

• India currently ranked at 44 in LPI*, and it aims to be amongst the top 10 countries by 2030

• In FY 2022 then Leased warehouses contributed 92% and only 8% contributed for Industrial usage

• Sector wise contribution to Indian economy

- ▶ Railways-1.5 %
- ▶ Air Transport-1.5 %
- ▶ Storage - 0.05%
- ▶ Water transport -1%

An Ideal Location of Warehousing and Logistics Hub for the Nation

➤ Hub & Spoke Advantage

Centrally located and well connected to all the major Indian cities and ports. MP being adjacent to 5 states carries advantage of being the central hub of India with inter & intra state connectivity for distribution of goods/services

➤ Strong Resource Base

Major producer of Coal, Limestone, Copper, Diaspore, Iron-ore, Pyrophyllite, Manganese, Dolomite, Rock Phosphate, Glass Sand and Cement

➤ Wheat Procurement

Madhya Pradesh is one of the largest wheat procurement State

➤ Consistent Economic Growth

One of the fastest growing states.

➤ Robust Support Infrastructure

Robust Support Infrastructure - Robust road network of over 3,00,000 km, 40+ national highways, 05 operational airports and 550+ trains making their way across the state daily

➤ Ease of Doing Business

Online approvals and reimbursements via Single Window System



* It was impacted due to the global Crisis.

Brief of MP Warehousing and Logistics Corporation

- ▶ MPWLC has 287 branches and 08 regional offices spread all over the state
- ▶ MPWLC is a specialized state agency have been providing scientific storage facilities for all commodities
- ▶ MPWLC storage capacity of the state is approximately 40 MMT (private & public sector)
- ▶ At 100+ locations, land size varying from 2 acres to 20 acres is readily available



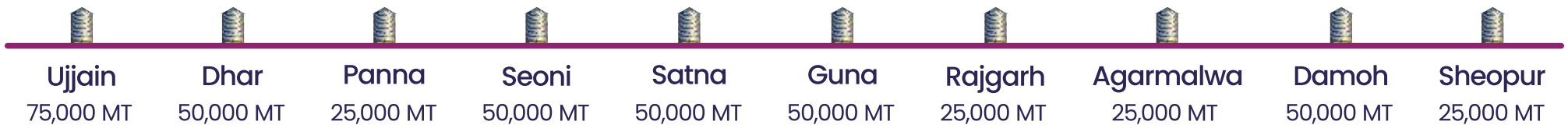
Success Stories

Steel Silos

Pioneer State of country in creation of steel silos on PPP mode

M.P. model of steel silos applauded at World Bank conference

New Capacity of 4.25 LMT proposed at 10 locations



Success Stories

➤ Silo Bags

- Total Capacity of 18.00 LMT in the state
- Pioneer state for adopting innovative
- Silo-bag storage facilities since 2013



➤ Built Operate & Transfer (BOT)

- Construction and Operation of Godown on existing constructed CAP* / Convertible CAP on BOT model with a Total Capacity of 8.12 LMT for 43 locations
- Concessional Period: 15 years including guarantee period
Rate : Rs83/MT/Month



* CAPS - Covered and plinth system

Multi Modal Logistic Project (MMLP)

- ▶ 10 out of 12 Warehousing and cold storage infrastructure, Multimodal logistic and industrial parks proposals of Madhya Pradesh were approved by the Government of India (2 under process)
- ▶ MoU between NHLML and MPIDC has been signed for development of MMLP at Indore
- ▶ In the first phase, setting up of MMLPs at Indore & Bhopal are to be established under Bharatmala Pariyojana of Govt of India
- ▶ MoU between MPWLC and CONCOR for Bhopal is under process

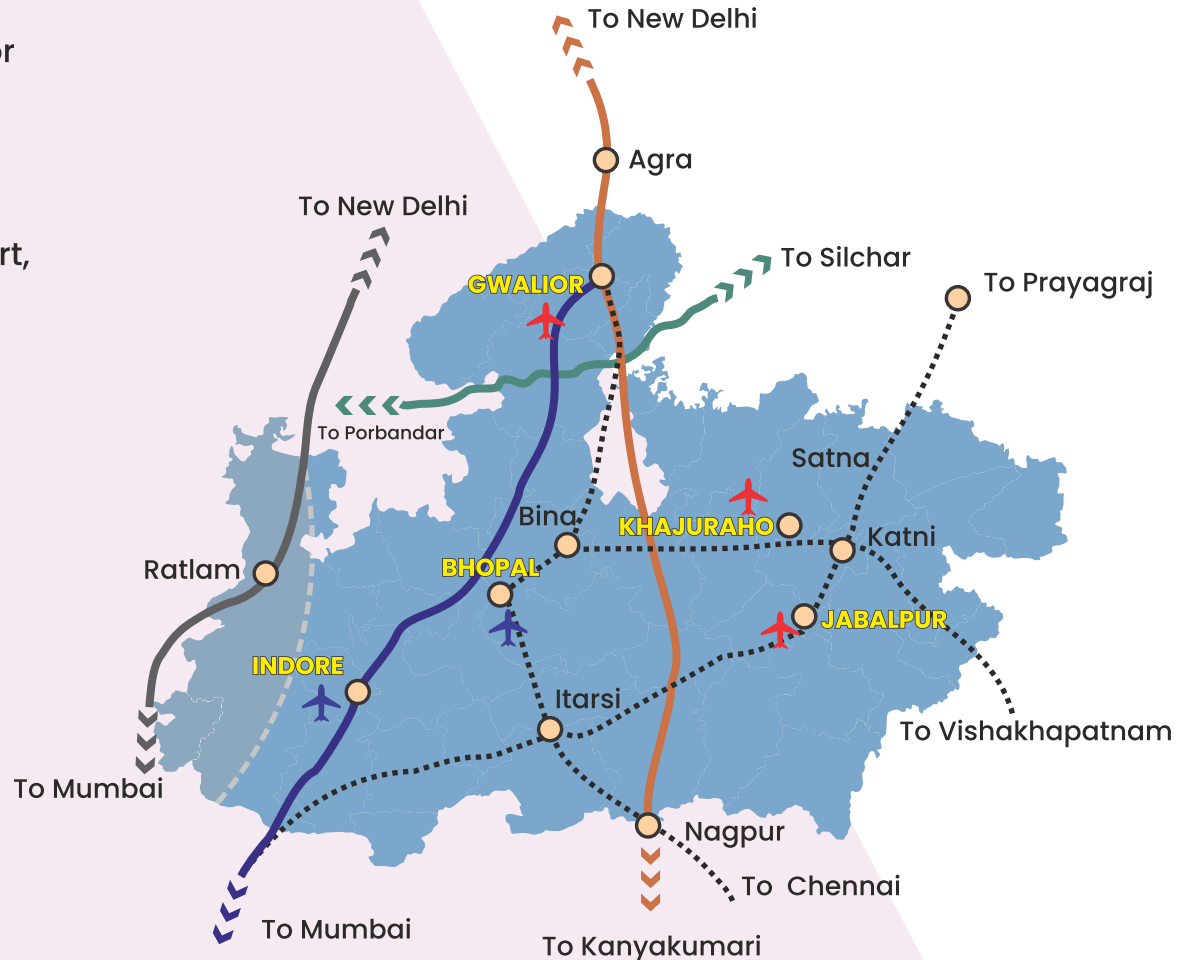


Investment Opportunities

➤ Upcoming Industrial Region & National Corridors of Madhya Pradesh

- Chambal Progressway industrial Corridor
- Narmada Expressway Industrial Corridor
- Indore Pithampur Economic Corridor
- Upcoming Greenfield International Airport, Indore
- Mega Investment Regions

- North-South Corridor
- East-West Corridor
- Delhi Mumbai Greenfield Expressway
- Agra Bombay Road
- DMIC Influence Region
- - - - Major Railway Lines



Investment Opportunities

➤ Potential Locations

- MPWLC is developing the storage facilities for Agro-based & Industrial warehouses
- Approx. 200LMT surplus storage capacity is available in various districts of the State
- Storage capacity theory of various business model under (PPP/JV/Tri- party agreement etc.)
- Option to create Built-to-Suit warehouses

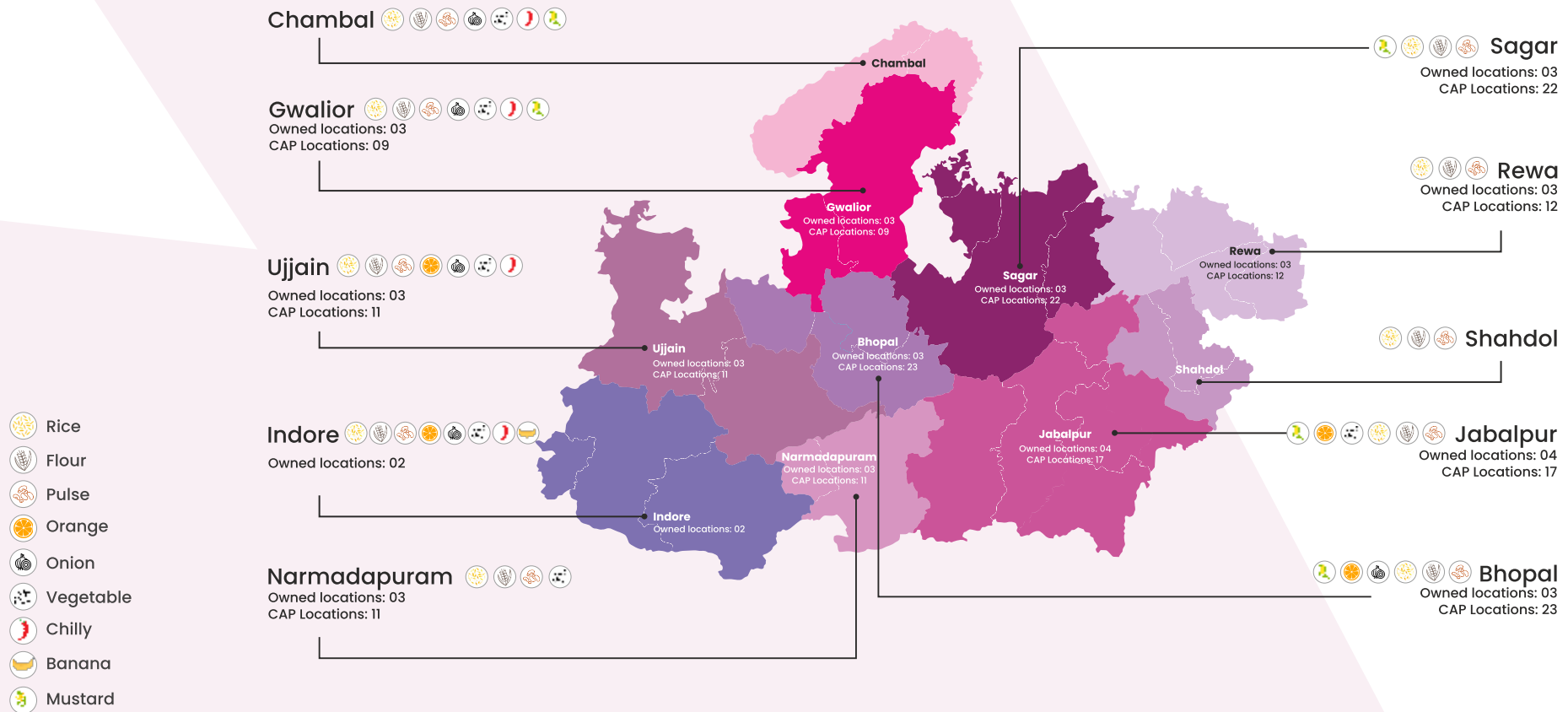
➤ Investment Opportunities in following sub-segments

- Smart Logistics & Warehousing
- Agri Silos
- Cold storage
- e-mandis
- Dedicated Agri & Food processing zones (For perishable zones)
- Fulfilment Centers
- Value-added service zones
- Dedicated Pharma zones
- Manufacturing & Processing Centre
- Other Specialized Zones Like
 - e-commerce industries
 - EV Charging Stations



Investment Opportunities

Regionwise CAPS* and Agricultural Commodities Produced



* CAPS – Covered and plinth system

State Govt Initiatives aligned with PM Gati Shakti Scheme



- ▶ PM Gati Shakti scheme is an integrated platform to bring together 16 infrastructure related ministries of GOI including railway and roadways together for comprehensive planning and smooth execution of infrastructure projects.

This scheme is based on six pillars Comprehensiveness, prioritization, optimization, synchronization, analytical and dynamic. Robust institutional mechanism (EGoS, NPG, TSU) setup to streamline logistics

- ▶ The National Logistics Policy targets to minimise logistical issues and manifold exports growth
- ▶ Product specific Cold storage facilities developed in SEZ (Indore)
- ▶ Command-and-Control Centres to ensure efficient traffic management
- ▶ Additionally, 24 Integrated Border Check Points are upcoming.
- ▶ The State has developed an online single window system for providing all logistics approvals
- ▶ Fast track allotment of land for expansion of Railway network



Incentive Policy – Logistic & Warehouse Sector



- ▶ **Investment Promotion Assistance**
Capital Investment subsidy on investment in plant and machinery
- ▶ **Infrastructure Development Assistance**
for creating roads, rail network etc.
- ▶ **Provision for Power Tariff Rebate and Electricity Duty Exemption**
- ▶ **Reimbursement of Stamp Duty and Registration Fee**
- ▶ **Customized package available for mega scale investments**



MP is home for 300+ large industries



Cipla



Caparo



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VE COMMERCIAL VEHICLES
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