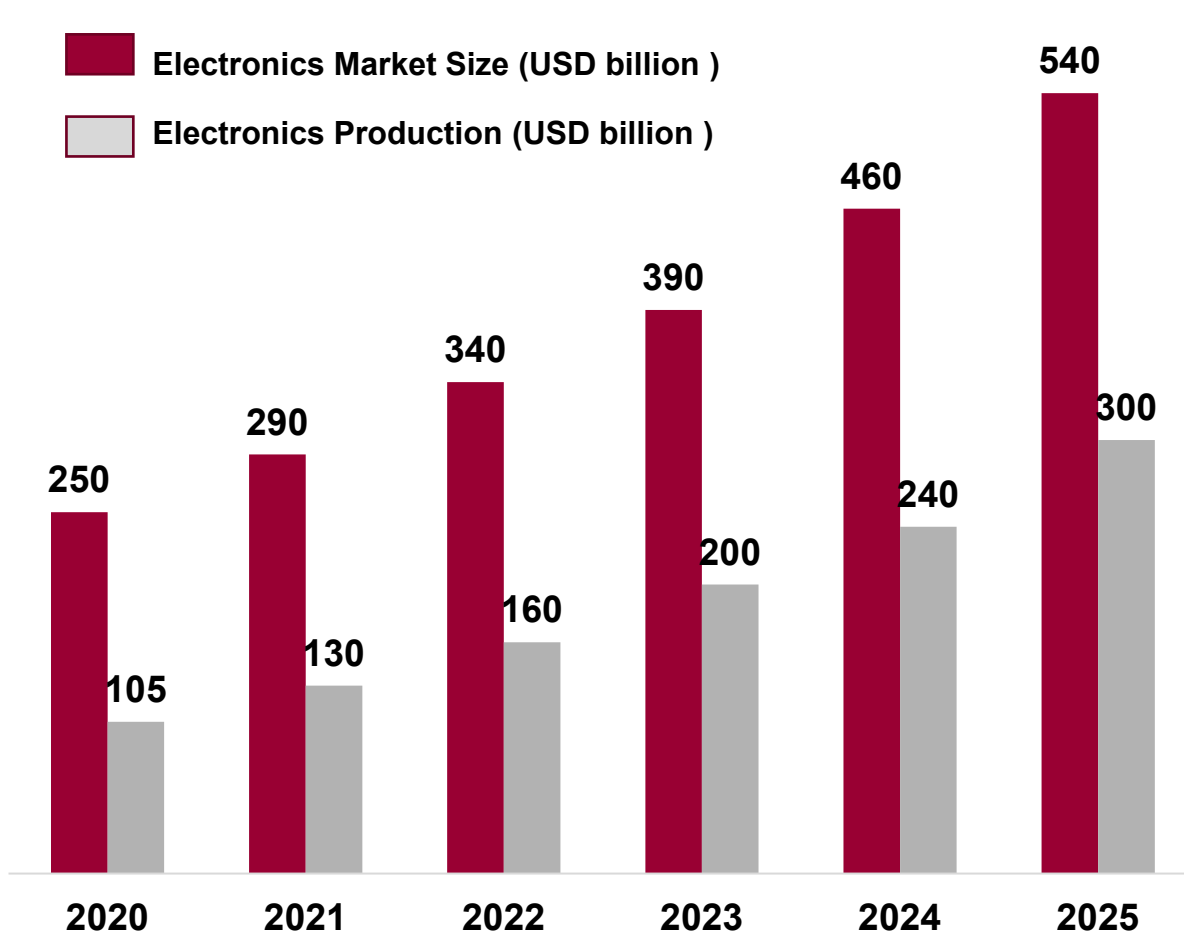




Electronics Industry in India

Electronics Industry- Market Overview



Source: IESA ESDM Report

Snapshot

Global Market Share

In FY2019, India's Electronics production represented only 3.3% of the global market

Domestic Production

In FY2019, India's Electronics production was 40% of the Electronics Market

Contribution to Digital Economy

Electronics Production market will contribute USD 300 bn (30%) to Digital Economy by FY2025

Electronics Industry- Market Segmentation



ESDM Market

ESDM market is expected to reach USD 220 bn by FY2025 and grow at 16% CAGR.

■ Electronics System Market (USD billion)

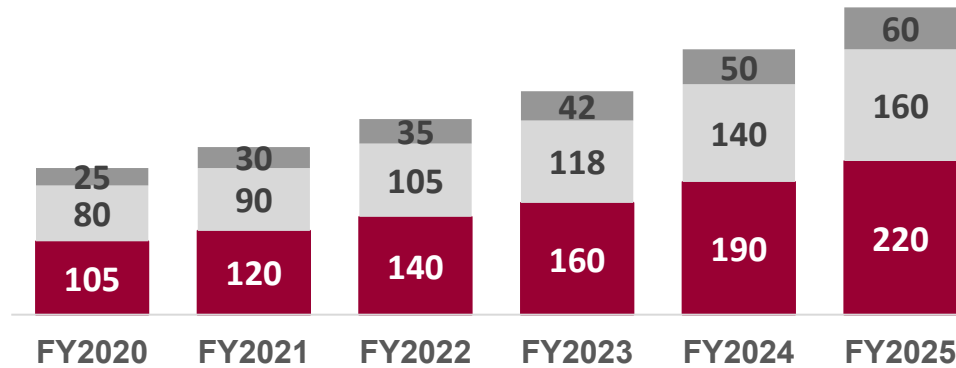
■ Electronics Design Market (USD billion)

Electronics System Market

Electronics System market is expected to grow at 15% CAGR

Electronics Design Market

Electronics Design market is expected to grow at 20% CAGR



- Electronics Design Market (USD million)
- Electronics System Market (USD billion)
- Electronics Systems Design Market (USD billion)

Electronics Industry- Market Share & Composition

Consumer Electronics



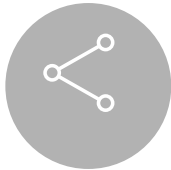
Favorable population composition and disposable income to drive consumer electronics market.

Strategic Electronics



Military communication systems, radars, navigation systems and platforms designed for defense to drive strategic electronics

Industrial Electronics



The Make in India Programme to boost engineering, electrical, automotive thus driving industrial electronics.

Computer Hardware



The usage of computers and peripherals in commercial and industrial establishments is likely to grow at a rapid pace

Electronic Components

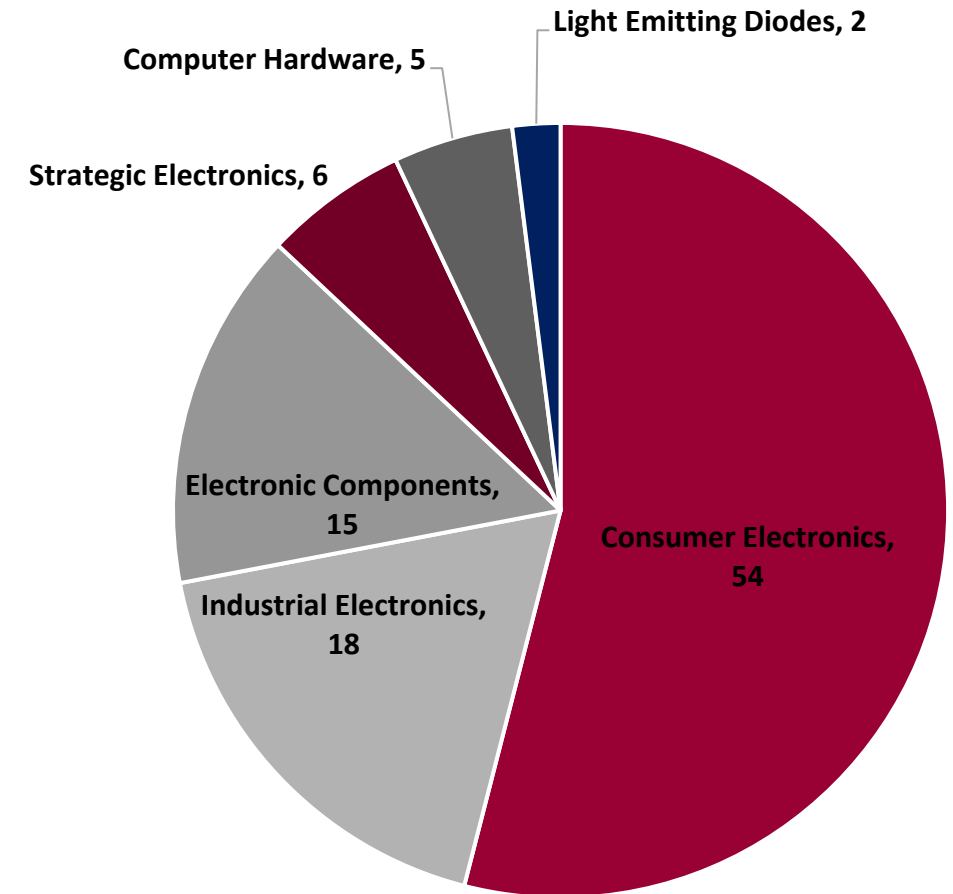


Rationalization of tariff structure, phased manufacturing and special incentives to boost electronic components

Light Emitting Diodes

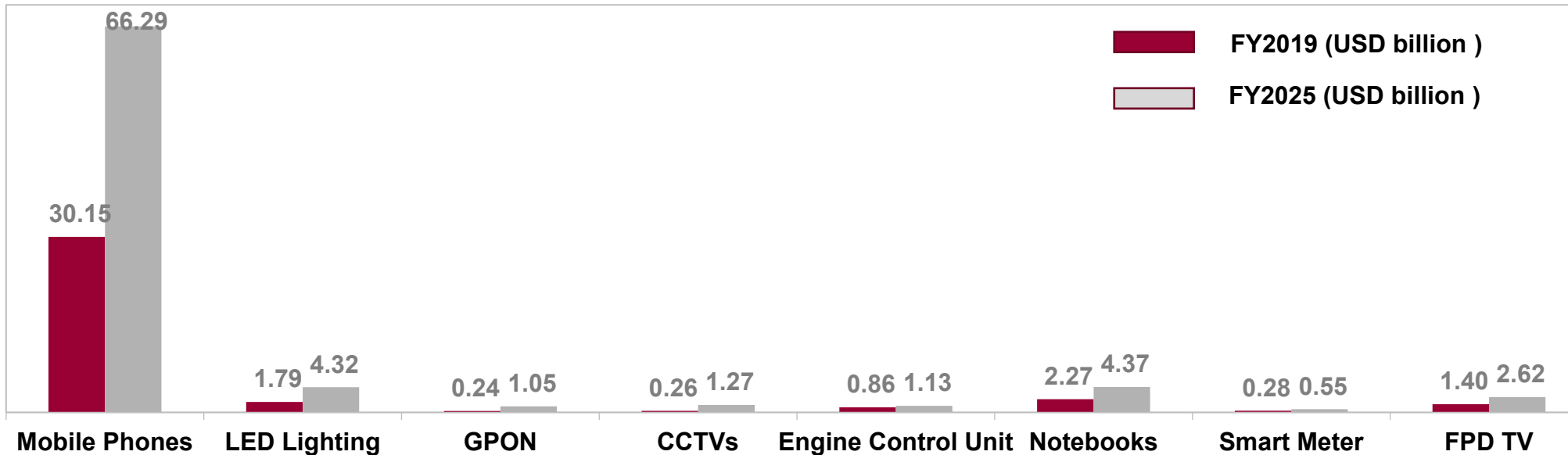


Lighting infrastructure is evolving with replacement of conventional products with LED lighting driven by government initiatives.



Electronics Market Share (%)

Electronics Industry- Market Opportunity



In FY2025, these 8 products will occupy 70% of the total Electronic Systems market

FY2019

FY2025

FY2019

FY2025

Low Value Manufacturing

- CCTV Cameras
- Mobile Phones
- LED Lighting
- FPD TVs
- Notebooks

- Mobile Phones
- FPD TVs
- Notebooks

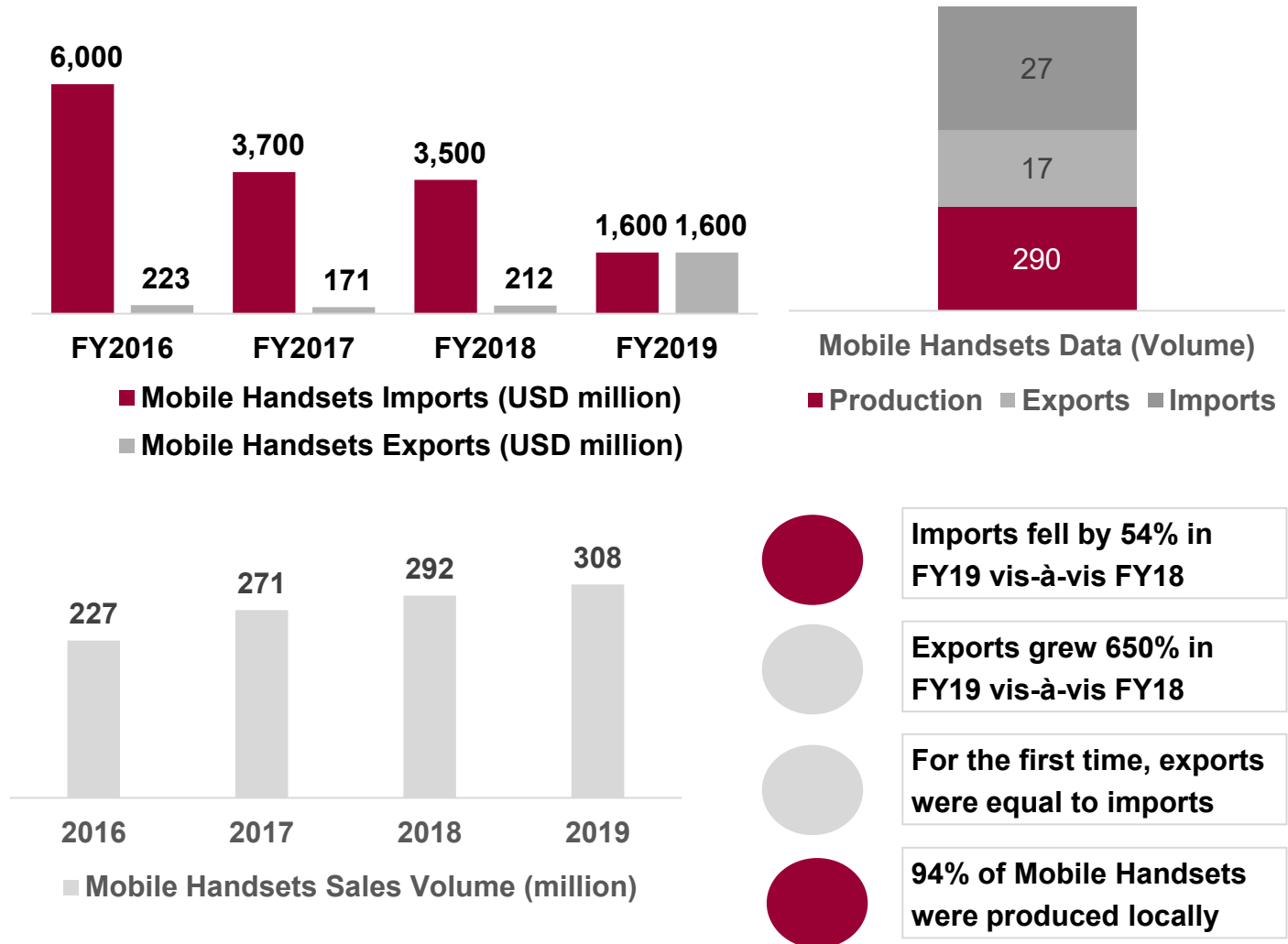
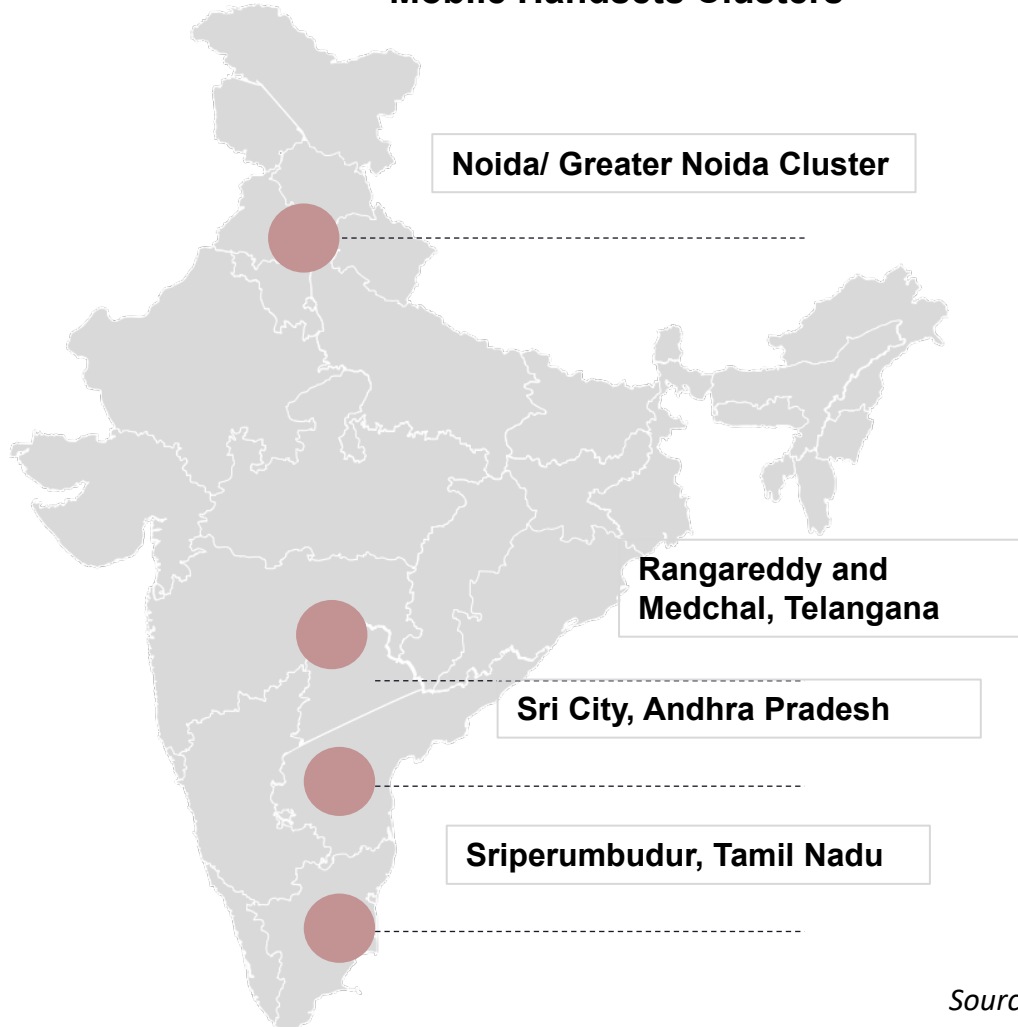
High Value Manufacturing

- Engine Control Unit
- GPON
- Smart Meters

- CCTV Cameras
- Engine Control Unit
- GPON
- Smart Meters
- LED Lighting

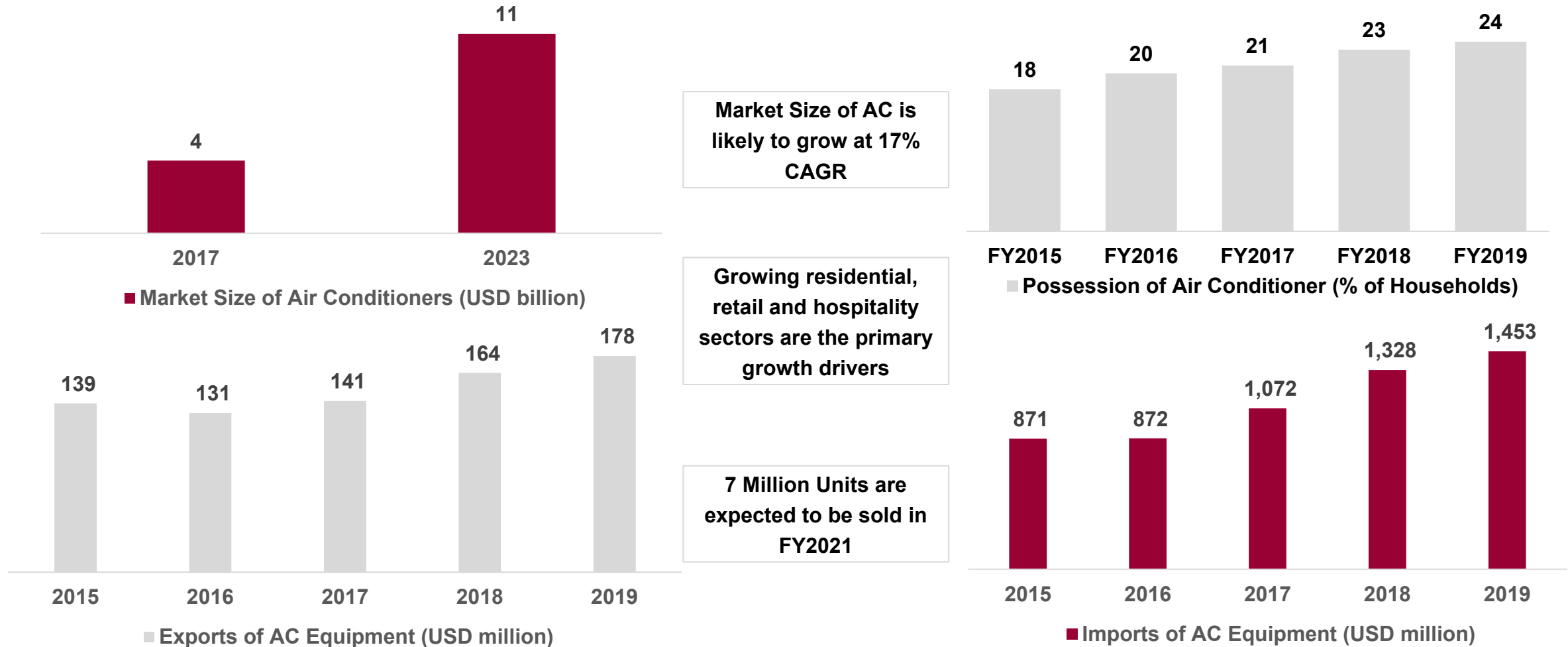
Electronics Industry in India- Mobile Phones

Mobile Handsets Clusters



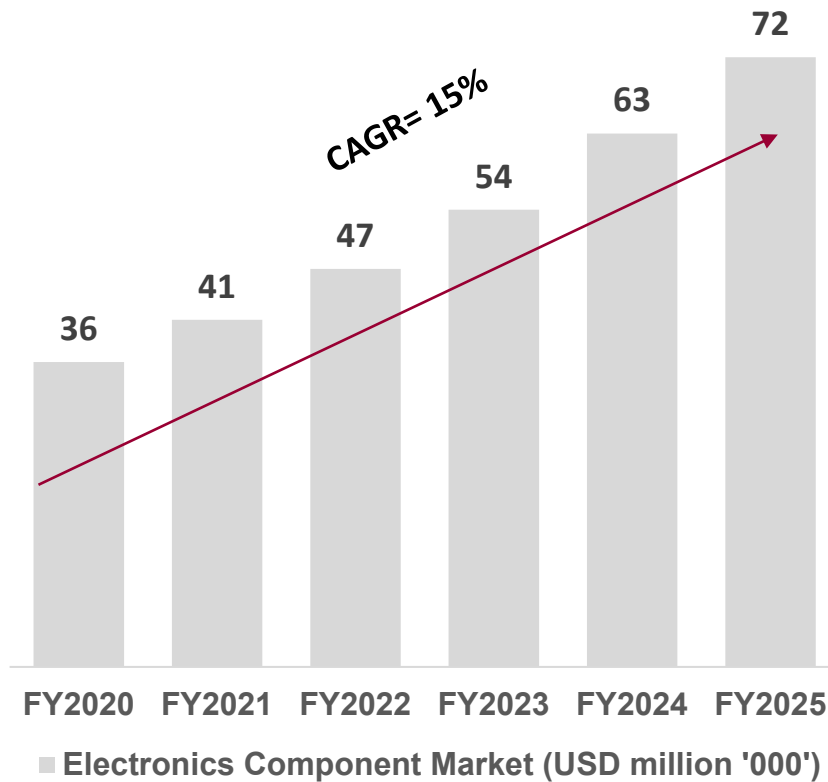
Source: Invest India, Euromonitor, 2020

Electronics Industry in India- Air Conditioners



Source: Euromonitor, 2020

Electronics Industry in India- Electronic Components



Electronic Components Segmentation

Electromechanical Components

Printer Circuit Boards and Connectors

Passive Components

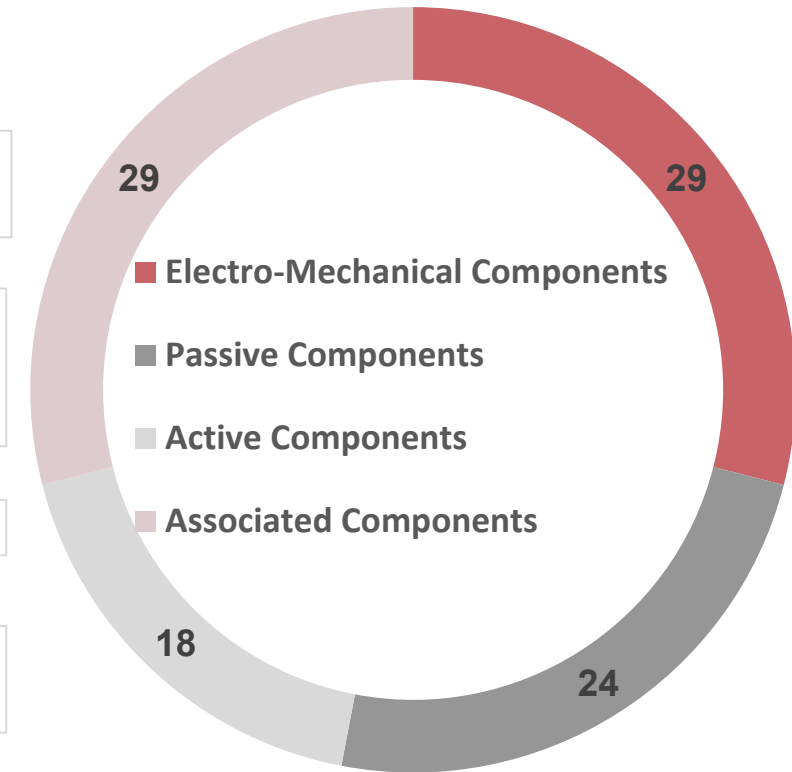
Wound Components, Capacitors and Resistors

Active Components

Diodes and Transistors

Associated Components

Optical Disc, Magnets, RF Tuners



Market Share (%) of Electronic Components

Electronics Industry- Government Initiatives

Electronics Manufacturing Target

USD400 bn domestic electronics manufacturing industry by FY2025

Mobile Handset Manufacturing Target

Production of 1 billion mobile handsets by FY2025 worth USD185 billion

Ease of Doing Business

Procedural simplification for import of second hand manufacturing plant and machinery

Ecosystem

Support in emerging technology areas- 5G, IoT/ Sensors, AI, Machine Learning, Robotics

Electronics Industry- Government Initiatives

Electronic Manufacturing Clusters Scheme

- ❑ For Greenfield Project- 50% of project cost subject to a ceiling of USD 7 million for every 100 acres
- ❑ For Brownfield Project-75% of Project Cost is subject to a ceiling of USD 7 million

Modified Special Incentive Package Scheme

- ❑ Subsidy of 20% on capital investments in SEZ
- ❑ Subsidy of 25% on capital investment in non SEZ

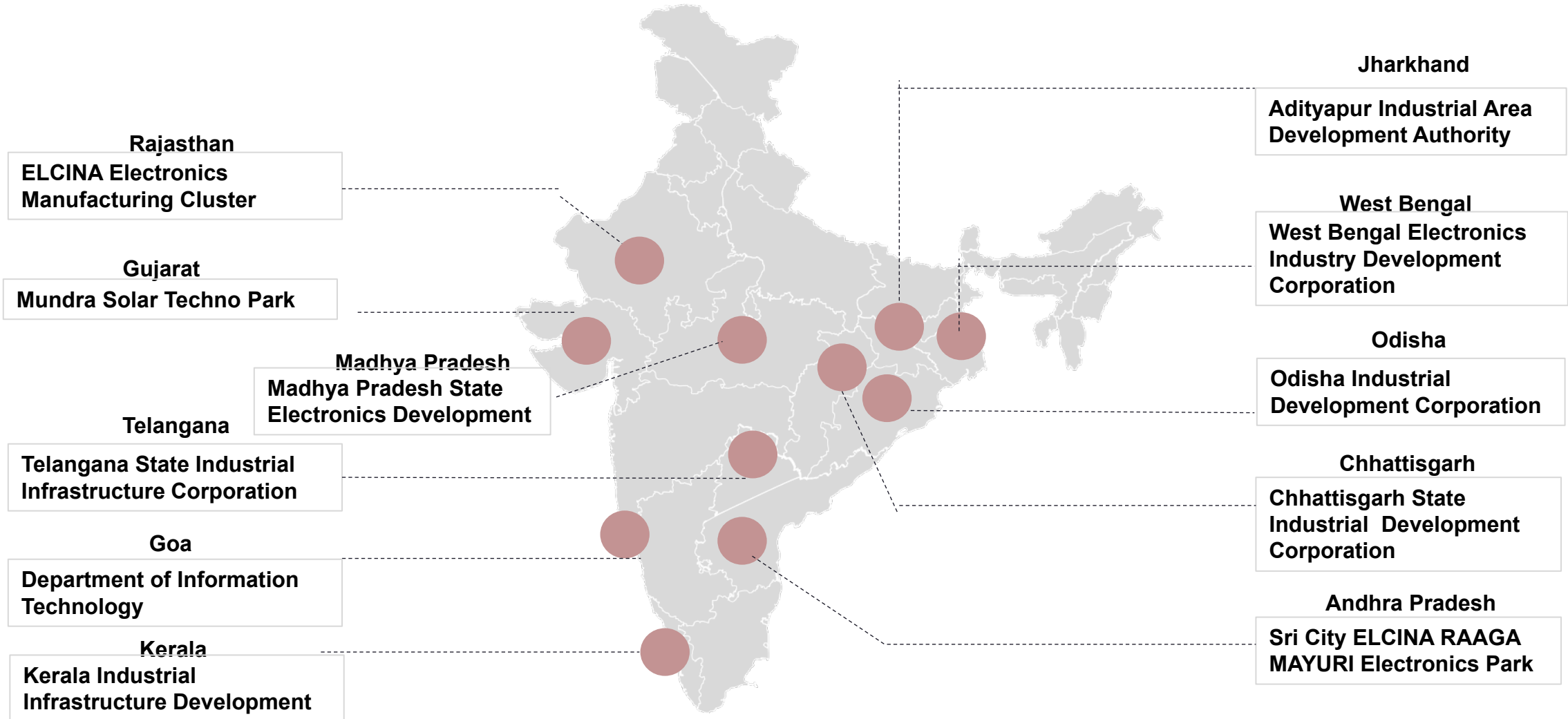
Foreign Direct Investment

- ❑ 100% FDI allowed under the automatic route
- ❑ Electronics in Defence- 49% allowed under automatic route

Production Linked Incentive (PLI)

- PLI for large scale electronics manufacturing to boost demand
- 4%-6% on incremental sales of goods manufactured in India for a period of 5 years

Approved Greenfield Electronic Manufacturing Clusters



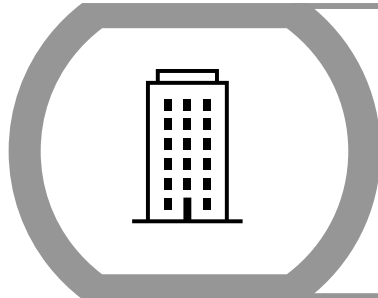
Source:: Invest India

Electronic Industry- Swiss Case Studies



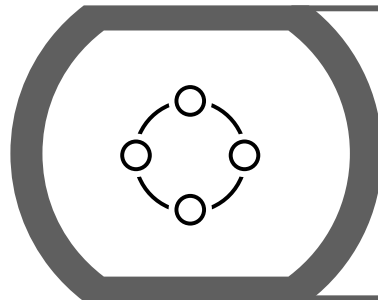
STMicroelectronics

Company Profile



Global Semiconductor company headquartered in Geneva, Switzerland. Develops and delivers semiconductor solutions across the spectrum of microelectronics applications.

India Operations

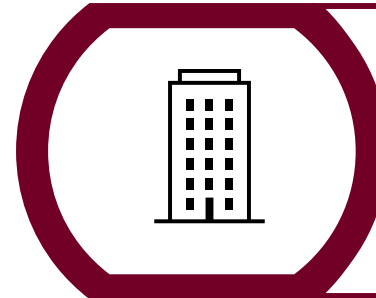


Registered in India as a Private company headquartered in Greater Noida, NCR. Product portfolio includes inkjet print heads, Micro Electromechanical Systems, sensors, set-top box.



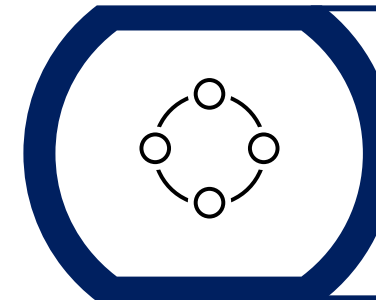
TE Connectivity

Company Profile



Global technology company headquartered in Switzerland. Designs and manufactures connectivity and sensor products used in automotive, industrial equipment, data communication.

India Operations



Registered in India as a Private company headquartered in Bengaluru. Product portfolio includes circuit protection, connectors, wire protection & management switches, sensors and cables.

Electronic Industry- Swiss Case Studies

Baumer Technologies India Pvt. Ltd.

- ❑ Machinery based company headquartered in Switzerland
- ❑ Established in India in the year 1989, it is a leading Manufacturer of a wide range of Level Measurement, Industrial Thermometer Filled system, RTD Connector



Baumer Technologies

Schurter Electronics India Pvt Ltd

- ❑ Member of the SCHURTER Group based in Switzerland. Manufactures, designs , develops, markets, and distribution
- ❑ Wide range of products like fuses, fuse holders, circuit breakers for equipment, IEC connectors, etc are manufactured locally with headquarters in Gujarat



Schurter Electronics

Logitech India

- ❑ A Swiss company focused on innovation and quality produces headsets, speakers and computer mice
- ❑ Maintains product development center in Chennai and marketing office in New Delhi

logitech

Logitech India

THANK YOU
