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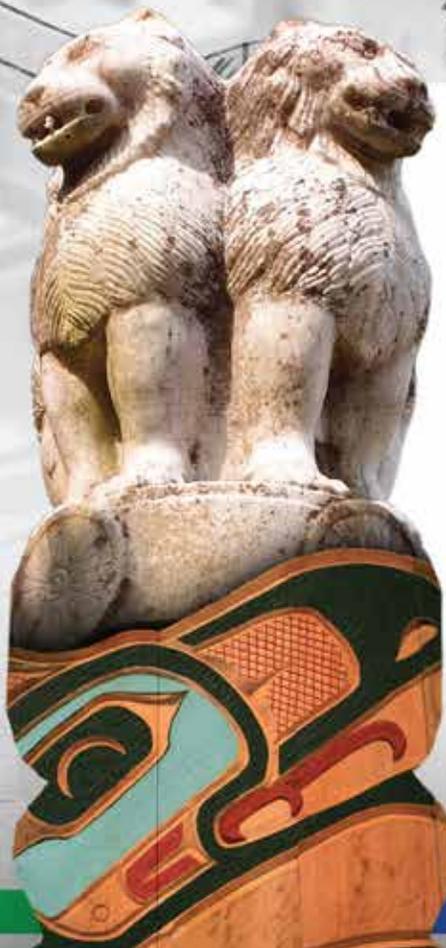


INDIA

MISSION

2016 REPORT

January 6 - 18

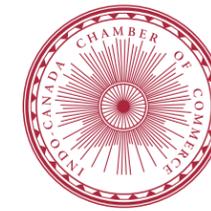


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INDIA MISSION 2016 REPORT

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Food processing combines raw food ingredients to produce marketable food products that can be easily prepared and served by the consumer. This report examines the Food Processing sector both in Canada and India, and the possibilities of collaborations in the sector between Canadian and Indian companies.

24 **Section II Health Care**



Health care is a subsector of Life Sciences sector that also includes biotechnology, pharmaceuticals, and medical devices and equipment. The analysis juxtaposes key aspects of the sector both from the Canadian and the Indian perspective to attempts at providing an insight that explains the salient features of the sector in both the markets.

36 **Section III Smart Cities**



The concept of Smart Cities has entered the lexicon of Indian policy makers in 2014 when Hon. Narendra Modi was elected the Prime Minister. The main agenda of Smart Cities Mission, constituted under his vision, was to develop a set of parameters to develop 100 Indian cities to make them citizen friendly and sustainable through the use of technology.

50 **Section IV Tourism and Hospitality**



Tourism and hospitality sector is a major source of revenue for both Canada and India. This analysis examines the sectors and also looks at the possible collaboration between the two countries. This industry is a multi-billion-dollar business that employs hundreds of thousands of Canadians. Travel and tourism is the third largest foreign exchange earner for India.

60 **India Mission 2016 Program Highlights**

PRESIDENT'S MESSAGE

The Indo-Canada Chamber of Commerce's (ICCC) India Mission 2016 that concluded on January 17 was a spectacular success. The nine cities, two weeks business and trade mission gave a new dimension to the bilateral trade relations between Canada and India.

Our Chamber utilized the nine-city India trade Mission 2016 to forge new ties with state (provincial) governments, trade and business chambers, and encouraged delegate members to similarly ink business deals during the two weeks in India; the Mission focused on four key sectors – Food Processing, Health care, Smart Cities, and Tourism and Hospitality. These are the sunrise sectors for Canada-India trade relations.

On behalf of the ICCC, as its President, I signed two Memorandums of Understanding (MoU) – with the Government of Uttar Pradesh and with the Thiruvananthapuram Chamber of Commerce. Both the MoUs will promote trade and business with Canada and the Indian states who are signatories to the understanding.

The MoU with Uttar Pradesh has special significance because it will promote trade between Canada and Uttar Pradesh, one India's provinces with the largest populations, and a positive demographic profile with a predominance of young population.

Uttar Pradesh was an important stop for the 2016 India Mission, where the delegates participated in the three-day inaugural Pravasi Divas (congregation of Indian Diaspora) organized by the Uttar Pradesh government in Agra. ICCC was a partner organization for this convention.

The UP PD was organized to share investment plans and policies in Uttar Pradesh on sectors like manufacturing, infrastructure development, urban transports, smart cities, industrial and social development, electronics, IT and ITeS and tourism etc.

ICCC's MoU with the Thiruvananthapuram Chamber of Commerce will aim to promote trade and business ties with the State of Kerala with Canada in the hospitality & tourism sector, pharmaceuticals, agriculture and agro Industry. What really made India Mission 2016 special was the MoUs that were signed by our delegates. These included:

► ICE Down Beverages Inc.'s MoU with Indo Canadian Business Council to manufacture Canadian water (Aqua Water) in Gujarat. This MoUs was signed between the representative of ICE Down Beverages Inc.'s CEO Elmokhtar Abouaisha and a representative of the ICBC.



► SPS Canada's MoU with Royal Academy of Gujarat for the cooperation in education sector, student services, skill development, student exchange program and immigration of Indian student to pursue higher education in Canada. Mr. Pradyuman Jhala, President SPS Canada signed MoU.

Another delegate signed a MoU with the Santhigiri Ashram in Thiruvananthapuram, Kerala for sharing the knowledge on Ayurveda and Yoga for drug abuse and rehabilitation. Santhigiri Ashram is a world-renowned spiritual center founded in 1964.

In another development, the International Centre for Entrepreneurship and Career Development (ICECD) Founder Director evinced interest for shooting a documentary film on Gujarat-Canada relations. ICECD has been the vanguard of Micro, Small and Medium Enterprise (MSME) Development amongst varying target groups and has worked extensively around the globe keeping gender issues in sharp focus.

India Mission 2016 also had important decision makers from Canada as delegates. Among these were Hon. Patrick Brown, MPP and leader of the Progressive Conservative Party of Ontario, and MPP Victor Fedeli, Jack Maclaren, Lisa Macleoud and Norm Miller. In recent years, Hon. Brown has been among the key leaders who have played a vital role in transforming the relations between Canada and India. These are exciting times for Canada-India relations, and especially Ontario-India relations. After our Chamber's highly successful India Mission 2016 that concluded in January, Canada-India business relations continue to surge with Ontario Premier Hon. Kathleen Wynne and Prince Edward Islands Premier Hon. H. Wade MacLauchlan leading separate business and trade missions to India.

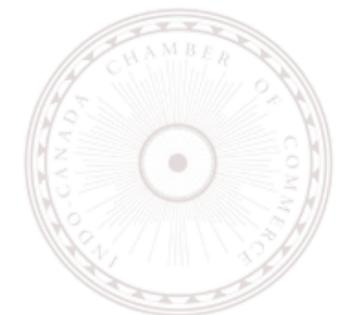
As a non-partisan organization whose mandate is to promote Canada-India bilateral trade relations, our Chamber wholeheartedly welcomes the efforts Hon. Kathleen Wynne has undertaken to foster our province's relations with India. After the then Premier Dalton McGuinty's India visit in 2010, Hon. Wynne has opened doors on several areas of cooperation between Ontario and India, and especially in the sphere of developing Smart Cities.

We hope that ICCC's good work to promote bilateral ties leads to greater glories in 2016, and beyond.

Thank you.

A handwritten signature in black ink, appearing to read "Sanjay Makkar".

Sanjay Makkar
President



ACKNOWLEDGEMENTS

ICCC acknowledges all the organisations who made India Mission 2016 a success, particularly the Canadian federal government, the Canadian High Commission (CHC) across India, Government of Uttar Pradesh, Government of Haryana, Government of Gujarat and Government of Kerala.

Additionally, ICCC acknowledges its partner organizations and corporate entities who help organize the numerous programs in India during India Mission 2016. These include: the All India Association of Industries (AIAI), Border Security Force (BSF), Confederation of Indian Industries (CII), City of Kochi, City of Vadodara, Federation of Indian Chamber of Commerce and Industry (FICCI), Department of Tourism Kerala, Gujarat Chamber of Commerce and Industry (GCCII), Indo-Canadian Business Chamber (ICBC), Maharashtra Chamber of Commerce & Industry (MCCIA), NEST Group of Companies, New Politan Pizza (NPP), Santhigiri Ashram, Trivandrum Chamber of Commerce & Industry (TCCI), Yes Bank India and World Trade Centre (WTC) Mumbai for the successful completion of the India Mission 2016.

ICCC also wish to acknowledge its India mission delegates who made it a grand success.



ACRONYMS

AIIMS – All India Institute of Medical Sciences
AMRUT - Atal Mission for Rejuvenation and Urban Transformation
BJP – Bharatiya Janata Party
CAGR – Compound Annual Growth Rate
CEO – Chief Executive Officer
CEPA – Comprehensive Economic Partnership Agreement
CII – Confederation of Indian Industries
CRAMS – Contract Research and Manufacturing Services
CSD – Carbonated Soft Drinks
CTC – Canadian Tourism Commission
DIPP – Department of Industrial Policies and Promotion
ECON – Ministry of Economy
ETA – Electronic Travel Authorisation
FDI – Foreign Direct Investment
FICCI – Federation of Indian Chamber of Commerce & Industry
FMCG – Fast Moving Consumer Goods
FY – Financial Year
GDP – Gross Domestic Product
HELIX - Health Entrepreneurship and Lifestyle Innovation Xchange
HIT – Health Care Technology
IBEF – India Brand Equity Fund
ICBC – Indo Canadian Business Council
ICCC – Indo Canada Chamber of Commerce
ICECD - International Centre for Entrepreneurship and Career Development
ICT – Information and Communication Technologies
IIT – Indian Institute of Technology
IMR – Infant Mortality Rate
INR – Indian National Rupee
IT – Information Technology
J & K – Jammu & Kashmir

JV – Joint Ventures
MDG – Millennium Development Goal
MHFW – Ministry of Health and Family Welfare
MoFPI – Ministry of Food Processing Industries
MoU – Memorandum of Understanding
MP – Member of Parliament
MPP – Member of Provincial Parliament
MSME – Micro, Small and Medium Enterprise
NABARD - National Bank for Agriculture and Rural Development
NCR – National Capital Region
NHMFA - National Health and Medical Facilities Accreditation Authority
OECD - Organisation for Economic Co-operation and Development
OOP – Out of Pocket
PPP – Public Private Partnership
PSL – Priority Sector Lending
R & D – Research and Development
RTD – Ready to Drink
SICI – Shastri Indo Canadian Institute
STEP – Saskatchewan Trade and Export Partnership
T & H – Travel & Hospitality
TVoA – Tourist Visa on Arrival
UAE – United Arab Emirates
UK – United Kingdom
UNESCO – United Nations Educational, Scientific and Cultural Organization
UP – Uttar Pradesh
UPPD – Uttar Pradesh Pravasi Divas
USA – United States of America
UT – Union Territories
WHO – World Health Organisation
WI FI - Wireless Internet for Frequent Interface
WTC – World Trade Centre

EXECUTIVE SUMMARY

Indo-Canada Chamber of Commerce's (ICCC) India Mission 2016 was a resounding success with over 50 Canadian small businesses joining the mission, and both the Chamber and the participating companies signing several Memorandums of Understanding (MoUs) during the mission.

The MoUs signed during the mission included two that the Chamber signed with the state government of Uttar Pradesh and with the Thiruvananthapuram Chamber of Commerce. Both the MoUs will promote trade and business with Canada and the Indian states who are signatories to the understanding. In addition, ICE Down Beverages Inc. signed a MoU with Indo Canadian Business Council to manufacture Canadian water (Aqua Water) in Gujarat; SPS Canada signed a MoU with Royal Academy of Gujarat for the cooperation in education sector; and another delegate signed a MoU with the Santhigiri Ashram in Thiruvananthapuram, Kerala for sharing the knowledge on Ayurveda and Yoga for drug abuse and rehabilitation.

Among the political leaders who accompanied ICCC's India Mission 2016 included Patrick Brown, the leader of Ontario's Progressive Conservative Party. Along with MPP Brown, a delegation of PC party leaders that included MPP Victor Fedeli, Jack Maclaren, Lisa Macleoud and Norm Miller were also part of the mission.

The two weeks business and trade mission visited eight cities and focused on four key sectors – Food Processing, Health care, Smart Cities, and Tourism and Hospitality. These are the sunrise sectors for Canada-India trade relations.



Food Processing: Canada and India have been collaborating proactively in this sector. Several key interlocutors including academic and business organizations have been collaborating to create a platform where ideas on policy

can be discussed with a view to enable a more collaborative approach between businesses in the two countries in this sector. The ICCC has been in the forefront in representing interests of both Canadian and Indian businesses in this sector. Its past presidents have represented the sector at the highest forums including parliamentary committees that examined broader issues of bilateral trade.

Trade between Canada and India in the agriculture and agri-food sector is expected to rise exponentially in the near future. India's growing economy and the rising consuming class will propel this growth. The trade will also move towards non-traditional subsectors such as food processing, storage and cold chain construction and management. The trade impediments – tariff and non-tariff barriers – that exist at present will hopefully be addressed by the on-going CEPA negotiations and pave the way for more enhanced trade in the sector.



Health care: There is a considerable difference between the prevailing health care systems in Canada and India. The Canadian life sciences sector is an important contributor to Canada's innovation economy, engaging in creating the

medical innovations that will improve health care delivery and patient care in Canada and abroad. At the beginning of the decade, the Indian life science industry began to take shape with new start-ups and diversification of established life sciences players. The subsectors in India's health care that are of interest to Canada are:

Pharmaceutical: The pharmaceutical industry in India is the world's third-largest in terms of volume and stands 14th in terms of value. This industry is growing at a compound annual growth rate (CAGR) of more than 15% over the last five years.

Biotechnology: The biotechnology industry in India holds about 2% share of the global market and has the potential to emerge as a global key player. India is ranked among the top 12 biotech destinations in the world and is the third largest in the Asia-Pacific region.

Medical Devices and Equipment: The Indian medical equipment and supplies market was estimated at US\$3 billion in 2011 and is expected to be worth US\$11 billion by 2023 as per industry estimates. The market for medical supplies and disposables is dominated by the domestic manufacturers, and medical equipment is imported.

Nutraceutical: Is an evolving segment in India. More and more pharmaceuticals, Fast Moving Health Goods (FMHG), over the counter (OTC) and Fast Moving Consumer Goods (FMCG) companies are entering into this segment; focusing mainly on preventive rather than curative therapy.

Canada can help India to move from an out-of-pocket to universal financed health care system to ensure health care for all class brackets. Indian health care system will require the convergence of action by financing institutions and political leadership.



Smart Cities: Under the vision and leadership of India's Prime Minister Narendra Modi, the Government of India's Ministry of Urban Development constituted a special Smart Cities Mission. The Mission's main agenda was to develop a set of parameters to

develop 100 Indian cities to make them citizen friendly and sustainable through

the use of technology. In the first round of this stage, 20 top scorers were chosen for financing during 2015-16. A total of ₹980 billion (US\$14 billion) has been approved by the Indian Cabinet for development of 100 smart cities and rejuvenation of 500 others.

There are tremendous opportunities for Canada and India to collaborate in this sphere. Soon after the Government of India launched the Smart Cities Mission, the Canadian High Commission in New Delhi swung into action to promote bilateral economic opportunities in this sphere. Recently, when Ontario Premier Hon. Kathleen Wynne led a 70-member delegation on the Ontario Business Mission to India, she met with the Indian Prime Minister Hon. Narendra Modi to discuss Ontario's involvement in the Smart Cities project.



Tourism and Hospitality:

Tourism and hospitality sector is a major source of revenue for both Canada and India. Canada's tourism industry is an important contributor to Canadian economic growth. This industry – which comprises hospitality and travel services to and from

Canada – is a multi-billion-dollar business that employs hundreds of thousands of Canadians.

In the Indian context, the total contribution by travel and tourism sector to India's GDP is expected to increase from US\$ 136.3 billion in 2015 to US\$ 275.2 billion in 2025. Travel and tourism is the third largest foreign exchange earner for India. In 2014, the country managed foreign exchange earnings of USD 19.7 billion from tourism.

Indian nationals rank in the top 10 source countries of international visitors to Canada. In 2014, more than 135,000 visitor visas were issued to Indian citizens, and nearly 14,000 Indian citizens were issued student permits. Between January and June 2014, almost 95 per cent of visitor visas issued to Indian nationals were multiple-entry visas, allowing travelers to visit Canada as many times as they want for up to 10 years.

Canadians Travel to India – 2013 (147099), 2014 (175536), and 2015 (190000). Government Initiatives include: Ease of Visa – E-visa announced and now in effect, Canadians traveling to India can apply online and visa issued on arrival to India. The 10 years visa announcement will also help in promoting the bilateral tourism. Both the governments are committed to ensure that trade relations continuously improve.

According to the Government of Canada's Market Access Plan for India (2015-2017), "Canada's priorities for engagement in India are for Canada to become a long-term, reliable partner for India's energy and food security; to enhance our position as a valued destination and partner in critical areas of education

and innovation; and to become a preferred supplier of capital and technology for infrastructure development.

Canada's enhanced engagement with India has been underscored by a high number of official visits, including 32 visits by Canadian federal ministers and 13 visits by provincial premiers since 2006, along with visits by Prime Minister Stephen Harper in 2009 and 2012 and a visit by Governor General David Johnston in February 2014.

Indian Prime Minister Narendra Modi paid a standalone bilateral visit to Canada from 14-16 April 2015, after a gap of 42 years, covering Ottawa, Toronto and Vancouver. He held extensive discussions with Canada's political, business and academic leaders and also addressed some 10,000 PIOs & friends of India, at Toronto on 15th April. The Prime Ministers agreed to elevate the bilateral relations to a strategic partnership and take concrete measures to expand bilateral cooperation in key areas including the economy, trade and investment, civil nuclear cooperation, energy, education and skills development, agriculture, defence and security, science, technology, innovation and space, culture, and people-to-people ties.



NOTE:

The sector analyses in this report are all based on secondary research and on information available in the public domain. The information contained herein is based on sources believed to be reliable, but its accuracy is not guaranteed. Reasonable effort has been made to determine the accuracy of information received. Readers are advised to seek appropriate legal / financial advice prior to relying on any information contained herein.



Food processing is the transformation of raw ingredients, by physical or chemical means into food, or of food into other forms. Food processing combines raw food ingredients to produce marketable food products that can be easily prepared and served by the consumer.

This report examines the Food Processing sector both in Canada and India, and the possibilities of collaborations in the sector between Canadian and Indian companies. It is a compilation based on secondary research of sector reports available in the public domain.

Food and beverage processing is the largest manufacturing industry in Canada in terms of value of production, and is an essential channel for Canadian agricultural products. It is a key economic sector, connecting producers to consumers and touching the lives of all Canadians, directly or indirectly.

"The total food production in India is likely to double in the next 10 years with the country's domestic food market estimated to reach US\$ 258 billion"

Accounting for about 32 per cent of the country's total food market, the food processing industry is one of the largest industries in India and is ranked fifth in terms of production, consumption, export and expected growth. The total food production in India is likely to double in the next 10 years with the country's domestic food market estimated to reach US\$ 258 billion by 2015-2016. It is currently valued at about US\$70b and

contributes to more than 35% of the total food market; in addition, 42 mega food parks being set up with an allocated investment of ₹98 Billion.

CANADIAN SCENARIO

The food and beverage processing industry is the largest manufacturing industry in Canada in terms of value of production with shipments worth \$92.9 billion; it accounts for 17% of total manufacturing shipments and for 2% of the national Gross Domestic Product (GDP). It's the largest manufacturing employer and provides employment for 246,000 Canadians.

It supplies approximately 75% of all processed food and beverage products available in Canada and is the largest buyer of agricultural production, using approximately 35% of its output. It is also the largest manufacturing employer in rural areas across Canada.

Exports of processed food and beverage products stood at \$27.8 billion in 2014, an increase of 9.8% over 2013; accounting for 26% of production value. Canadian processed food and beverage products are exported to some 190 countries with a significant proportion exported to a few countries. In 2014, almost 89% of the total went to six major markets:

- ▶ United States (71%)
- ▶ Japan and China (6% and 7% respectively)
- ▶ Russia, South Korea, Mexico (1.6%, 1.3% and 2.1% respectively)

Until 2009, the balance of trade in processed food and beverage products had been positive since 1995 and peaked at \$5 billion in 2004. With the rise in the Canadian dollar, it has declined annually between 2004 and 2009 when the balance of trade reflected a record deficit of \$1.9 billion. In 2011, the balance of trade returned to a positive value, at \$0.2 billion and since then has dipped back down to a deficit of 1.2 billion in 2014.

The largest food and beverage processing industry is meat product manufacturing which accounted for 25% of all shipments and \$26.3 billion in 2014. Dairy product manufacturing is the second largest industry with sales of \$17.3 billion, followed by grain and oilseed milling with sales of \$10.6 billion. Other industries include:

- ▶ Beverage manufacturing (\$10.4 billion)
- ▶ Bakeries and tortilla manufacturing (\$8.4 billion)
- ▶ Animal food manufacturing (\$7.5 billion)
- ▶ Fruit and vegetable preserving, and specialty food manufacturing (\$7.3 billion)
- ▶ Seafood product preparation and packaging (\$4.6 billion)
- ▶ Sugar and confectionery product manufacturing (\$4.1 billion)
- ▶ Other food manufacturing (\$9.1 billion)

The food processing industry is the largest manufacturing industry in most provinces. Although food processing is important to the economies of all provinces, Ontario and Quebec account for most of the production with approximately 63% of sales, British Columbia and Alberta account for 21% and the remaining provinces, 14%. The food and beverage processing industry invests about \$2 billion annually in capital expenditures, with about 80% of the total invested in machinery and equipment. Approximately 60% of food and beverage manufacturing sales are accounted for by domestically owned firms.

About 6,500 food and beverage processing establishments exist in Canada. Ninety percent of establishments have less than 100 employees; 9% have between 100 and 500 employees; while only 1% of establishments have more than 500 employees. The largest 50 food processing firms, in terms of sales, account for approximately 60% of value of food manufacturing shipments, while the largest 4 beverage firms account for about 63% of beverage shipments.

BEVERAGES

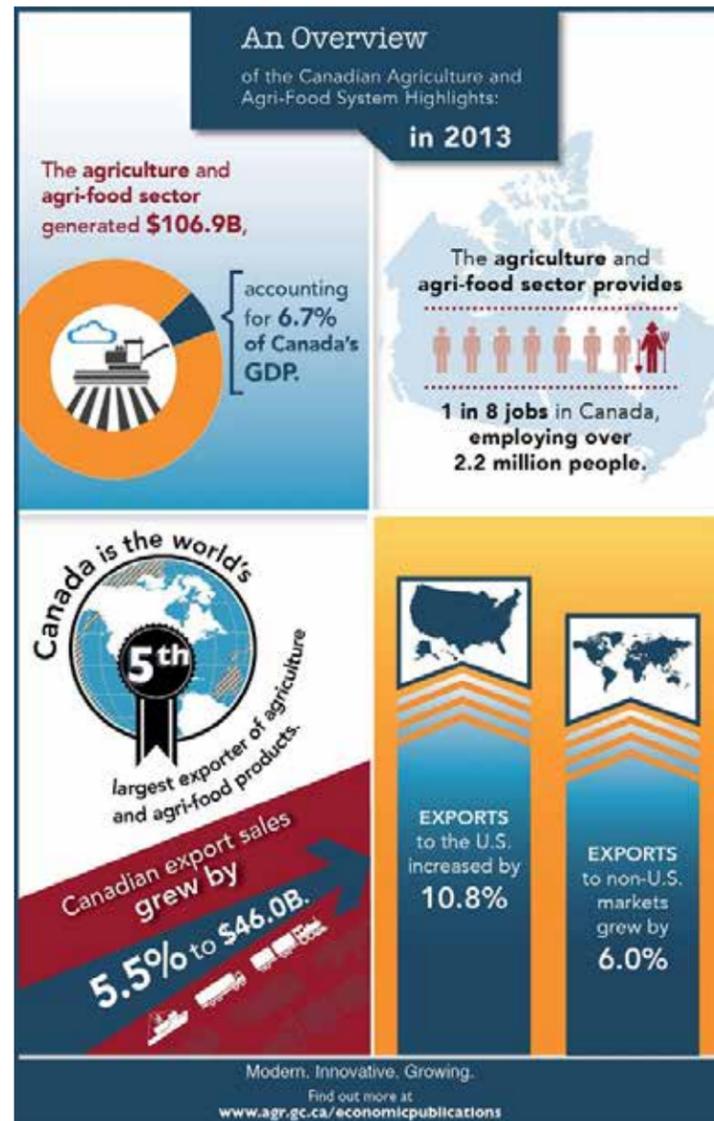
The Canadian soft drink manufacturing industry makes and bottles non-alcoholic carbonated beverages, including fruit flavoured beverages, colas, ginger ales, ginger beers, root beers, bottled or canned iced tea and iced coffee, soda waters, tonic waters and other mixers. While the term "soft drinks" sometimes means

"About 6,500 food and beverage processing establishments exist in Canada. The food processing industry is the largest manufacturing industry..."

different things to different people, for the purposes of this profile these soft drink beverages are referred to as carbonated soft drinks (CSDs). The industry also makes other non-alcoholic beverages, including but not limited to, iced tea, iced coffee, dairy-based beverages, fruit juices and fruit drinks, bottled water, sports drinks and energy drinks.

The Canadian Soft Drink and Ice Manufacturing industry represented 4.8% of the total value of sales of goods manufactured by the food and beverage industry, 4.5% of employment in the sector, and 3.2% of the number of food and beverage plants in 2009. In 2009, 287 establishments in the Soft Drink and Ice Manufacturing Industry shipped \$4,032.6 million worth of product and employed 11,162 people. Canadian Soft Drink and Ice Manufacturing Industry exports totalled \$127.3 million in 2009 (Figure 1). The Canadian market absorbed the remaining \$3,905.3 million in domestic shipments and a volume of imports worth \$593.9 million. This industry has become a net importer since 2006.

The following infographic illustrates the agri-food market in Canada:



INDIAN SCENARIO

According to the latest (January 2016) India Brand Equity Fund (IBEF) report, The Indian food industry is poised for huge growth, increasing its contribution to world food trade every year. In India, the food sector has emerged as a high-growth and high-profit sector due to its immense potential for value addition, particularly within the food processing industry. Accounting for about 32 per cent of the country's total food market, the food processing industry is one of the largest industries in India and is ranked fifth in terms of production, consumption, export and expected growth. The total food production in India is likely to double in the next 10 years with the country's domestic food market estimated to reach US\$ 258 billion by 2015.

"The Government of India has approved proposals for joint ventures (JV), foreign collaborations, industrial licenses and 100% export oriented units..."

The Government of India has been instrumental in the growth and development of the food processing industry. The government through the Ministry of Food Processing Industries (MoFPI) is making all efforts to encourage investments in the business. It has approved proposals for joint ventures (JV), foreign collaborations, industrial licences and 100 per cent export oriented units.

India's gross cropped area amounts to 195.25 Million Hectares, with cropping intensity of 139%. The net irrigated area is 65.26 Million Hectare. A total of 127 agro-climatic zones have been identified in India. Strategic geographic location and proximity to food-importing nations makes India favourable for the export of processed foods.

India also boasts of an extensive network of food processing training, academic and research institutes; and as previously stated, 42 mega food parks are being set up in Public Private Partnership (PPP) at an investment of ₹98 Billion. The parks have around 1,200 developed plots with basic infrastructure enabled that entrepreneurs can lease for the setting up of food processing and ancillary units; 138 cold chain projects are being set up to develop supply chain infrastructure.

The cost of skilled manpower is relatively low as compared to other countries. Attractive fiscal incentives have been instated by central and state governments and these include capital subsidies, tax rebates, depreciation benefits, as well as reduced custom and excise duties for processed food and machinery. It isn't surprising then that major global players in the food domain are already present in India.

Market Size

The Indian food and grocery (including beverages) market is the world's sixth largest, with retail contributing 70 per cent of the sales. It is projected to grow at the rate of 104%, touching US\$ 482 billion by 2020. The Indian food processing industry accounts for 32% of the country's total food market, 14% of manufacturing Gross Domestic Product (GDP), 13% of India's exports and six

per cent of total industrial investment. Indian food service industry is expected to reach US\$ 78 billion by 2018. The Indian gourmet food market is currently valued at US\$ 1.3 billion and is growing at a Compound Annual Growth Rate (CAGR) of 20%. It is expected to cross US\$ 2.8 billion by 2015.

The online food ordering business in India is in its nascent stage, but witnessing exponential growth. The organised food business in India is worth US\$ 48 billion, of which food delivery is valued at US\$ 15 billion. With online food delivery players like FoodPanda, Zomato, TinyOwl and Swiggy building scale through partnerships, the organised food business has a huge potential and a promising future.

"The online food ordering business in India is in its nascent stage, but witnessing exponential growth... The food delivery is valued at US\$ 15 billion..."

Beverages

The beverage industry in India constitutes of around US\$ 230 million among the US\$ 65 billion food processing industry. The major sectors in beverage industry in India are tea and coffee which are not only sold heavily in the domestic market but are also exported to a range of leading overseas markets. Half of the tea and coffee

products are available in unpacked or loose form. Among the hot beverages manufactured in India, tea is the most dominant beverage that is ruling both the domestic and international market even today. The supply of tea and coffee is insurmountable in the Indian beverage industry.

Fruit juices, pulp and concentrates, and sauces or ketchups are doing very well in the beverage market in India for the past few years. Various milk products, health beverages, beer, and country liquors have also been contributing largely in the rising demand of beverages in India. The leading beverage companies in India are also exporting various products especially tea and coffee to the international markets every year.

Statistics

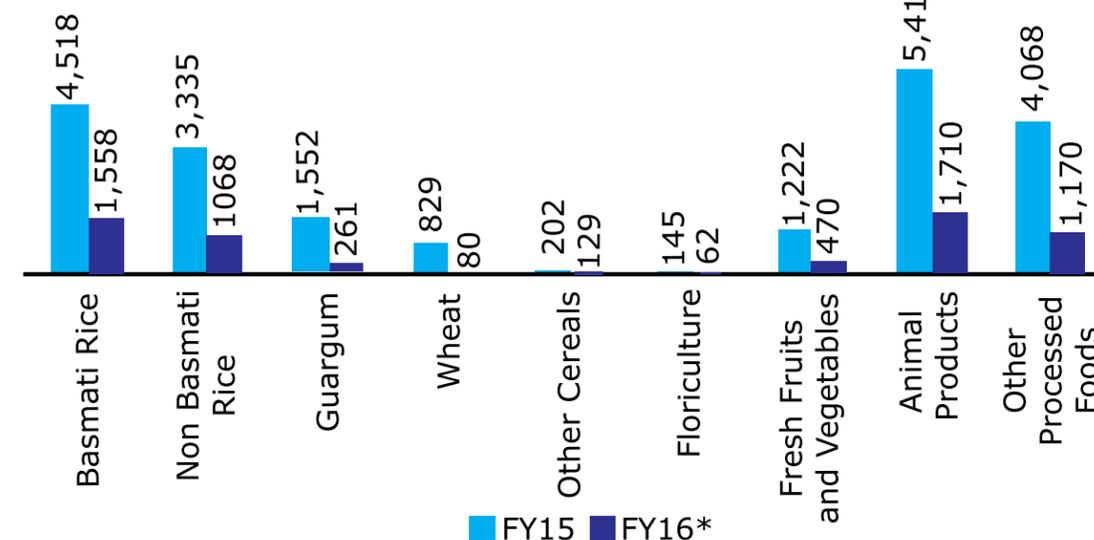
India ranked sixth in the World in exports of agricultural products in 2013. Major industries constituting the food processing sector are grain milling, sugar, edible oils, beverages, fruits & vegetables processing and dairy products. The contribution of the food processing sector to the Gross Domestic Product (GDP) in 2012-13 amounts to ₹845.22 Billion. India's food processing sector has grown at an average rate of 8.4% during last five years ending 2012-13.

The share of food processing sector in GDP of manufacturing sector was 9.8% in 2012-13. Investment in fixed capital in registered food processing sector had grown annually at 18.8% during last five years ending 2012-13. The number of registered food processing units has increased from 36,881 in 2011-12 to 37,175 in 2012-13, marking a growth rate of 0.80%.

Food Processing Industry is one of the major employment intensive segments contributing 13.04% of employment generated in all Registered Factory sector in 2012-13.

Food is the biggest expense for an urban and rural Indian household constituting share of 38.5% and 48.6% of the total consumption expenditure of households in 2011-12 respectively.

Exports of key processed products (US\$ millions, FY15 and FY16*)



Source: APEDA, Agri Exchange, TechSci Research
Note: FY16*- Data is for April- August 2015

Source: IBEF

Growth drivers

Liberalisation and the growth of organised retail has made the Indian market more attractive for global players; with a large agricultural resource base, abundant livestock and cost competitiveness, India is fast emerging as a sourcing hub of processed foods. With a population size of 1.22 billion of which 604 million were under the age of 24 in 2011, this rising youth population is likely to increase India's overall food consumption.

Other growth factors include:

- ▶ Rising income levels, affluence and a growing middle-class.
- ▶ One-third of the population will be living in urban areas by 2020.
- ▶ Increasing desire for branded food as well as increased spending power.
- ▶ Large distinct consumer segments to support customised offerings/ new categories and brands within each segment.

- ▶ Consumption in India is driven towards packaged and ready-to-eat foods.
 - ▶ Favourable economic & cultural transformation, shift in attitudes & lifestyles, consumers are experimenting with different cuisines, tastes and new brands. There is an increase in awareness and concern for wellness and health, high protein, low fat, wholegrain and organic food.
 - ▶ Exports of food items have been rising steadily, the main export destinations being Middle East and South East Asia.
- Policy and regulations

India allows 100% FDI is permitted in the automatic route for most food products. Food processing is recognised as a priority sector in the new manufacturing policy in 2011. Government had announced setting up of special fund of ₹2,000 Crore (1 crore = 10 million) in the Financial year 2014-15 in NABARD (agricultural promotion agency) for extending affordable credit to designated food parks and the individual processing units in the designated food parks at concessional rates. The fund is being continued in 2015-16.

Reserve Bank of India has classified loan to food & agro-based processing units and Cold Chain under Agriculture activities for Priority Sector Lending (PSL) subject to aggregate sanctioned limit of ₹100 Crore per borrower. It will ensure greater flow of credit to entrepreneurs for setting up of food processing units and attract investment in the sector.

Food Processing

Food Processing Sector In India to Reach USD 258 billion in FY15

<p>World's 2nd Largest Arable Land</p> <p>10th largest arable land resources in the world</p> <p>20 agri-climatic regions, all 15 major climates in the world exist in India</p> <p>Possesses 46 of the 60 soil types in the world</p> <p>Leading Milk Producer</p> <p>India is the largest producer of the milk</p> <p>2nd largest producer of fruits and vegetables</p> <p>Rising Consumer Expenditure</p> <p>Consumer spending- USD 1 trillion in 2015 and projected to reach USD 3.6 trillion by 2020</p> <p>Favourable Location For Exports</p> <p>Strategic geographic location</p> <p>Proximity to food importing nations</p>	<p>Highest Livestock Population</p> <p>Livestock population- 512 million, including 119 million milch (in-milk and dry) animals, 135 million goats and 65 million sheep</p> <p>The segment contributes 25% to farm GDP</p> <p>Policy Support</p> <p>100% FDI under automatic route</p> <p>Investment in April 2000- May 2015 stood at USD 6.3 billion</p> <p>Promoting rationalization of tariff and duties</p> <p>Setting up of National Mission on Food Processing</p>
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Source: TechSci Research

INVESTMENT OPPORTUNITIES

According to the data provided by the Department of Industrial Policies and Promotion (DIPP), the food processing sector in India has received around US\$ 6.55 billion worth of Foreign Investments during the period April 2000—September 2015. The Confederation of Indian Industry (CII) estimates that the food processing sectors have the potential to attract as much as US\$ 33 billion of investment over the next 10 years and also generate employment of nine million person-days.

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Investment in food start-ups, which mainly include food ordering apps, has increased by 93 per cent to US\$ 130.3 million comprising 17 deals in 2015 till September 2015 as against only five deals in 2014.

Some areas within food processing that are expected to see a steady inflow of investments in India include:

- ▶ Fruits and vegetables: preserved, candied, glazed and crystallised fruits and vegetables, juices, jams, jellies, purees, soups, powders, dehydrated vegetables, flakes, shreds and ready-to-eat curries. Food preservation by fermentation: wine, beer, vinegar, yeast preparation, alcoholic beverages. Beverages: fruit-based, cereal-based.
- ▶ Dairy: liquid milk, curd, flavoured yoghurt, processed cheese, cottage cheese, Swiss cheese, blue cheese, ice cream, milk-based sweets
- ▶ Food additives and nutraceuticals
- ▶ Confectionery and bakery: cookies and crackers, biscuits, breads, cakes and frozen dough
- ▶ Meat and poultry: eggs, egg powder, cut meats, sausages and other value added products
- ▶ Fish, seafood and fish processing – processing and freezing units
- ▶ Grain processing – oil milling sector, rice, pulse milling and flour milling sectors
- ▶ Food preservation and packaging: metal cans, aseptic packs
- ▶ Food processing equipment: canning, dairy and food processing, specialty processing, packaging, frozen food/refrigeration and thermo-processing
- ▶ Consumer food: packaged food, aerated soft drinks and packaged drinking water
- ▶ Supply chain infrastructure – this niche has investment potential in food processing infrastructure, the government's main focus is on supply chain related infrastructure like cold storage, abattoirs and food parks
- ▶ The establishment of food parks – a unique opportunity for entrepreneurs, including foreign investors to enter in the Indian food processing sector

Foreign investors who are already in India are: Kraft (USA), Mars (USA), Nestle (Switzerland), McCain (Canada), Danone (France), Ferrero (Italy), Del Monte (USA), Kagome (Japan), Kelloggs (USA), Pepsi (USA), Unilever (Anglo Dutch), Perfetti (Italy), Cargill (USA), Coca Cola (USA), Hershey (USA), among others. The government agencies that regulate the sector include: Ministry of Food Processing Industries, Food Safety and Standards Authority of India, Agriculture and Processed Foods Export Development Authority, National Institute for Food Technology and Entrepreneurship Management, All India Food Processors Association, Commodity Boards under the Ministry of Commerce and the Ministry of Agriculture/Ministry of Food Processing: coffee, tea, spice, meat and grapes.

CANADA-INDIA COLLABORATION

Canada and India have been collaborating proactively in this sector. In addition, academic and business organizations have been collaborating to create a platform where ideas on policy can be discussed with a view to enable a more collaborative approach between businesses in the two countries in this sector.

The ICCC has been in the forefront in representing interests of both Canadian and Indian businesses in this sector. Its past presidents have represented the sector at the highest forums including parliamentary committees that examined broader issues of bilateral trade.

"The ICCC has been in the forefront in representing interests of both Canadian and Indian businesses in the food processing sector, which is expected to rise

In addition, the Chamber has collaborated with institutions such as the Shastri Indo-Canadian Institute (SICI), and held roundtables on the theme: CEPA and Beyond: Canada-India Partnership in Agriculture and Food Processing. A roundtable jointly organized by Shastri Indo-Canadian Institute (SICI) in partnership with Indo-Canada Chamber of Commerce with support from University of Regina and Ministry of the Economy (ECON), Government of Saskatchewan, was held at the University of Regina in October 2013.

A background note was made available to all roundtable participants on agriculture and food processing. The two sub-groups had comprehensive discussions on:

- ▶ The role of governments, business and industry for building partnership in agriculture and food processing and for promoting food and nutrition security;
 - ▶ Strengthening cooperation in agriculture research and biotechnology: Interface between academia, industry, business and government;
- The need for more effective and sustained actions in these two areas was highlighted by the participants.

The event, in important ways builds on the momentum gained by Engaging India events held in Halifax, Ottawa, Saskatoon, Calgary, Montreal and Engaging French Canada event held in Pondicherry.

CONCLUSION

Trade between Canada and India in the agriculture and agri-food sector is expected to rise exponentially in the near future. India's growing economy and the rising consuming class will propel this growth. The trade will also move towards non-traditional subsectors such as food processing, storage and cold chain construction and management. The trade impediments – tariff and non-tariff barriers – that exist at present will hopefully be addressed by the on-going CEPA negotiations and pave the way for more enhanced trade in the sector.

Canadian exporters will continue to face stiff competition especially from exporters of countries that deal with the same set of products and are in close geographical proximity to India. In future, product innovation and experimenting with new products such as canola oil and blends of canola with locally popular vegetable oils may be the way forward.

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- ▶ Report on Food Processing is a compilation on industry sector reports available in the public domain. These include, among others, the following:
 - <http://www.agr.gc.ca/eng/industry-markets-and-trade/statistics-and-market-information/by-product-sector/processed-food-and-beverages/the-canadian-soft-drink-industry/?id=1172167862291>
 - <http://www.ibef.org/industry/indian-food-industry.aspx>
 - <http://www.sici.org/news/article/canada-india-partnership-in-agriculture-food-processing-regina-roundtable-o/>
 - <http://business.mapsofindia.com/food-industry/beverage/>
 - <http://www.agr.gc.ca/eng/industry-markets-and-trade/statistics-and-market-information/by-region/asia-pacific/market-overview-india/?id=1417025850512>
 - <http://www.makeinindia.com/sector/food-processing>
 - <http://www.agr.gc.ca/eng/programs-and-services/list-of-programs-and-services/agri-food-trade-service/?id=1410965065217>



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India and Canada. - Naresh Chavda, Chair Membership Committee - ICCC



Health care is a subsector of Life Sciences sector that also includes biotechnology, pharmaceuticals, and medical devices and equipment. This analysis focuses on the Canadian and Indian health care sector, and is based on secondary research already available in the public domain.

The analysis juxtaposes key aspects of the sector both from the Canadian and the Indian perspective to attempts at providing an insight that explains the salient features of the sector in both the markets.

“ Health care’s share of Canadian GDP is expected to increase marginally to 11.6%. Public funding accounts for around 71% of total health care spending

The Canadian life sciences sector is an important contributor to Canada’s innovation economy, engaging in creating the medical innovations that will improve health care delivery and patient care in Canada and abroad.

The Indian life sciences sector has highlighted India’s profile in the last decade. At the beginning of the decade itself, this industry began to take shape with the sprouting of dozens of start-up companies as well as the diversification of established life sciences players by setting up biotech divisions, to focus on this segment.

ALLOCATIONS

In terms of numbers, Canada’s public spending on health care has risen at a high rate over the past decade, raising concerns about the sustainability of the country’s health care system. Total Canadian spending on health care in 2013 amounted to an estimated US\$206 billion, or 11.3 percent of gross domestic product (GDP).

Spending is forecast to rise by an average of 4.5 percent a year (in nominal local-currency terms) in 2014-2018, to US\$464.3 billion. Health care’s share of Canadian GDP is expected to increase marginally by 2018, to 11.6 percent. Public funding accounts for around 71 percent of Canada’s total health care spending. Most of the rest is split between private insurers (13 percent) and consumers’ out-of-pocket (OOP) expenses (14 percent).

For India, the spending on health care was an estimated five percent of gross domestic product (GDP) in 2013 and is expected to remain at that level through 2016. Total health care spending in local-currency terms is projected to rise at an annual rate of over 12 percent, from an estimated \$96.3 billion in 2013 to \$195.7 billion in 2018. While this rapid growth rate will reflect high inflation, it will also be driven by increasing public and private expenditures on health.

COMPOSITION

The Canadian health care industry spans the research, development and manufacturing continuum. Industry players include small and medium-sized companies developing diagnostics, biopharmaceuticals, pharmaceuticals and medical devices, as well as global companies with research, development and manufacturing operations in Canada, serving both domestic and international

markets. Contract service providers in Canada provide industry support for research and development, clinical trials and manufacturing. Canada’s world-class health research institutions and research networks are integral partners in research and knowledge translation.

India’s public health care system is patchy, with underfunded and overcrowded hospitals and clinics, and inadequate rural coverage. Reduced funding by the Indian Government has been attributed to historic failures on the part of the Ministry of Health and Family Welfare (MHFW) to spend its allocated budget fully.

This is despite increasing demand, due, in part, to growing incidence of age- and lifestyle-related chronic diseases resulting from urbanization, sedentary lifestyles, changing diets, rising obesity levels, and widespread availability of tobacco products. India’s health care sector witnesses close to 50 percent spend on in-patient beds for lifestyle diseases, especially in urban and semi-urban pockets. In addition, India has one the world’s highest numbers of diabetes sufferers, at more than 65 million individuals. This trend has resulted in the mushrooming of super specialty hospitals to combat lifestyle diseases.

SHARE OF GDP

Given the significance of health care’s share of Canada’s GDP and broader fiscal constraints in the country, the focus has shifted from total spend to relative value being realized from public investment in the health system. Also, global comparative reports suggest that other industrialized countries similar to Canada are realizing better health and system outcomes from government investment in health.

Canada’s health care system is primarily, but not exclusively, publicly funded and publicly delivered. High-level national health policy is set by the federal government, and partially funded through macro transfer payments to the provinces and territories. However, the provincial and territorial governments play a significant role in health policy, funding, system oversight, and administration. The result is a national framework for health with discrete, separately designed and administered provincial/territorial health systems addressing population needs.

The statistics for India’s health infrastructure are below that of other large countries. The U.S. has one bed for every 350 patients while the ratio for Japan is 1 for 85. In contrast, India has one bed for every 1,050 patients. To match bed availability to the standards of more developed nations, India needs to add 100,000 beds this decade, at an investment of \$50 billion. Also, India’s expenditure on health care information technology (HIT) is considerably low. Hospitals in India will need to increase their IT spend considerably to provide improved and patient-centric service.

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The shortage of qualified medical professionals is one of the key challenges facing the Indian health care industry. India's ratio of 0.7 doctors and 1.5 nurses per 1,000 people is dramatically lower than the WHO average of 2.5 doctors and nurses per 1,000 people. Furthermore, there is an acute shortage of paramedical and administrative professionals.

"Canada's public health system is experiencing service demand increases resulting from the advance of chronic diseases and an aging population

The situation is aggravated by the concentration of medical professionals in urban areas, which have only 30 percent of India's population. Many patients, especially those living in rural and semi urban areas, are still receiving services from unqualified practitioners. The industry needs an additional 1.54 million doctors and 2.4 million nurses match the global average.

India's health care professional and infrastructure shortage is one of the major reasons for the country's

high mortality rate. Although there has been a consistent decline in the Infant Mortality Rate (IMR) and the Under-Five Mortality Rate (U5MR), based on robust projections, at the current rate of decline, India could not meet the targets for Millennium Development Goal (MDG)-4, which aims to reduce by two-thirds, between 1990 and 2015, the under-five mortality rate.

PUBLIC SPENDING

While public funding and open access to health is a Canadian tenant, the important role of private providers should not be overlooked. Private providers are a meaningful part of the health delivery system providing both publicly and privately funded services to Canadians. As health systems seek solutions to pressing challenges in meeting escalating health demands with limited resources, there is an emerging focus on seeking new models beyond the traditional public models in place across the country.

This focus is not on privatization of the health system but rather social innovation whereby novel approaches are being consider in health and human services which maintain social values of access and equity, while delivering improved outcomes through alternative business models involving public, private, and non-profit sectors.

DELIVERY MECHANISMS

Canada's public health system is experiencing service demand increases resulting from the advance of chronic diseases and an aging population. To address these issues, early stages of population management are emerging with a focus on key population segments and the resulting shift from episodic care to alternative approaches to managing longitudinal needs across settings of care with expectations for outcomes not volumes/outputs.

This is requiring government and health providers to shift funding models and delivery models. Simultaneously, citizen expectations continue to increase, driving the need for care that is personal, innovative, and reflects engagement of the

citizen in their health management. This is a significant cultural shift from "doing to" patients to "partnering with" individuals in their health management; the culture shift is equally significant for health professionals as it is for patients and their caregivers and is expected to be a long journey.

Meeting health demands will be an ongoing challenge, as Canada's supply of doctors, nurses, hospital beds, and acute care beds is quite low relative to the size of its population compared with other OECD economies. There were 1.9 doctors per 1,000 population in 2011, and 2.1 hospital beds for the same population size. This combined with fiscal constraint requires new models of service delivery to shift the demands on limited health human resources and acute resources to other settings of care and care providers.

A shift to outcomes-based, patient-driven health care and increasing pressure to demonstrate value for money spent are all major drivers of change in Canada. Government and health system leaders are focusing on advancing innovation and productivity as catalysts to addressing systemic challenges. The Canadian health system has a strong clinical, research, education, and administrative foundation to build upon. These strengths have fostered research discovery and front-line innovation in care delivery and clinical practices. The challenge remains to spread those innovations and accelerate adoption to advance health systems' change and realize improved outcomes at a population level.

India requires an overhaul of its entire healthcare system. While there have been improvements in life expectancy and infant mortality rates, the Indian system reinforces poverty traps which challenge the socio-economic well-being of the family.

The current assumption that the private sector will innovate itself out of these challenges may not turn out to be true. The trajectory of development in the healthcare sector evidences that this is actually not true, as rural and urban poor are being further pushed down the poverty line or out of the healthcare system altogether.

Canada can help India to move from an out-of-pocket to universal financed healthcare system to ensure healthcare for all class brackets. Indian health care system will require the convergence of action by financing institutions and political leadership. However, the growth of medical tourism in India is growing and patients from Europe and North America are moving to India for their treatment especially in heart related surgeries and other cosmetic surgeries which are cheaper in India as compared to other countries.

The government's low spending on health care places much of the burden on patients and their families, as evidenced by the country's out-of-pocket (OOP) spending rate, one of the world's highest. According to the World Health

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Organization (WHO), just 33 percent of Indian health care expenditures in 2012 came from government sources. Of the remaining private spending, around 86 percent was OOP.

Several public health insurance systems exist, such as state-level employee insurance for industrial workers and the central government's health care plan for civil servants. Large companies also operate employee health policies. While health insurance penetration in India is increasing, it has been proposed that better accessibility to quality health care could be made possible by extending coverage to all employees in the private sector and by offering inexpensive health plans for the poor. This way, people can have full coverage for themselves, their families and elders.

INDIAN BUDGETARY VISION

From here onward, the analysis will focus on the emerging scenario in the Indian health care sector. India's new Bharatiya Janata Party (BJP)-led government is announcing a new health policy to focus on reducing malnutrition, improving the use of essential medicines, expanding immunization, modernizing public hospitals, and instituting a better tobacco control program. The government wants a holistic health care system that is universally accessible, affordable, and dramatically reduces OOP expenditures.

The Indian Government has accorded priority in its 2014-2015 budget to the health care sector. Key recommendations that will have a direct impact on

“ ... a rise in FDI limit in the medical insurance business to 49%; 4 more medical institutions of the status of AIIMS; 12 more medical colleges in the public sector

enhancing health care access include a rise in foreign direct investment (FDI) limit in the medical insurance business to 49 percent; four more medical institutions of the status of All India Institute of Medical Sciences (AIIMS); 12 more medical colleges in the public sector; and broadband connections in rural areas to expand the reach of telemedicine.

In addition, a \$1.7 billion fresh fund allocation to encourage start-ups and another scheme for establishing biotech clusters will help to develop innovative health care technologies. Finally, the budget provisions also aim to address the infrastructure deficit by establishing institutions like AIIMS in all states and setting up 15

model rural health research centers to bridge the rural-urban divide.

One way to increase India's health care funding and access is through innovative public-private partnerships. While an appropriate model for partnerships at the primary, secondary, and tertiary levels still remains a distant dream, participation by the government and private sector will help create a blueprint for such partnerships to create an infrastructure for the future.

One such example in India is SRL (Diagnostic), which has partnered with the Himachal Pradesh State Government to set up and operate 24 labs in the large

state-run hospitals in various districts, thereby bringing superior diagnostics services to the doorstep of people in remote areas.

Among other suggestions to improve care, companies should leverage information technology (IT) to create patient-centric healthcare systems that can improve response times, reduce human error, save costs, and impact the quality of life. At the same time, the government should focus on establishing more medical colleges and training institutes to provide the requisite doctors, dentists, nurses and paramedics. The government also should invest in preventive and social medicine by promoting health education and preventive health-care concepts.

The three subsectors of Life Sciences that have assumed significance in recent years include:

► Pharmaceutical

The pharmaceutical industry in India is the world's third-largest in terms of volume and stands 14th in terms of value. This industry forms the biggest chunk of the life sciences sector in India and has been growing at a compound annual growth rate (CAGR) of more than 15% over the last five years and has significant growth opportunities. India is one of the most prominent pharmaceutical markets in the world despite being fragmented between thousands of firms, distributors and retailers. The industry has traditionally focused on manufacturing generic drugs, but with the recognition of product patents in 2005, research and development activities have gained momentum.

The funds dedicated to R&D activities are much lower in India and, to date, no Indian company has been able to launch any new product. India is also becoming a preferred destination for contract research and manufacturing services (CRAMS) because of a genetically diverse population, a diverse disease profile, low costs and adherence to global standards.

India has about 250 pharmaceutical companies under the organized category and some of the major Indian companies are Alembic, Cadila, Cipla, Dr. Reddys, Lupin Labs, Sun Pharmaceuticals, Ranbaxy Labs, Torrent Pharma and Wockhardt. Major foreign companies in India include Abbott India, AstraZeneca, Aventis Pharma, Burrough-Wellcome, Glaxo-SmithKline, Merck, Novartis, Pfizer, Wyeth and Apotex.

► Biotechnology

The biotechnology industry in India currently holds about 2% share of the global market and has the potential to emerge as a global key player. India is ranked among the top 12 biotech destinations in the world and is the third largest in the Asia-Pacific region in terms of the number of biotech companies in the country.

The biotechnology industry in India grew by 17% during 2011-12 with total revenues of US\$4 billion with Bio-pharma contributing US\$2.4 billion and bio-agri

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about US\$0.5 billion of the total. Some analysts suggest that revenues could triple within 5 years exceeding US\$10 billion.

Out of the five broad categories within India's biotech industry, bio-pharma, bio-services, bio-agri, bio-informatics, and bio-industrial, the first two are the most important segments according to their revenue contribution. While the bio-pharma segment accounts for three-fifth of the total sector revenue, the agri-biotech sector in India has seen annualised growth of 30% over the last five years, the fastest growing segment. The Indian bio-informatics market grew 10% to reach a modest US\$50 million.

About 350 companies operate in the biotechnology sector in India. Some of the biotechnology companies in India are Biocon, Serum Institute, Panacea Biotech, Nuziveedu Seeds, Reliance LifeSciences, Quintiles, Rasi Seeds, Novo Nordisk, Shantha Biotechnics, Venkateshwara Hatcheries, Indian Immunologicals, TransAsia Biomedics and Mahyco. South India, with biotech hubs such as Bangalore in Karnataka and Hyderabad in Andhra Pradesh, represents the biggest hub for biotech companies.

► Medical Devices and Equipment

The Indian medical equipment and supplies market was estimated at US\$3 billion in 2011 and is expected to be worth US\$11 billion by 2023 as per industry estimates. The market for medical supplies and disposables is dominated by the domestic manufacturers, whereas the costly and high-end medical equipment is mostly imported.

"The Indian medical equipment and supplies market was estimated at US\$ 3 billion in 2011 and is expected to be worth US\$ 11 billion by 2023

The medical instruments and appliances used in specialties such as ophthalmic, dental and other physiological classes accounts for 25% of the total market, followed by the orthopedic/prosthetic goods segment accounting for 20%, medical supplies for 12.4%, the high-end specialty electro medical equipment for 10.2%, and X-ray apparatus for 9.4% of the total market.

Diagnostic kits segment, estimated at US\$600 million, is a high growth segment of the medical devices and equipment market with a growth rate of 20% over previous year. Imports constituted more than 50% of the Indian market with a growth rate of 20% over previous year.

The Indian medical devices and diagnostics industry is on a high growth trajectory. These developments are expected to impact the demand for medical devices and diagnostics. Global leaders in medical devices such as Johnson and Johnson, GE Healthcare, Philips and Siemens are setting up their own ventures with novel, low-cost products suited for Indian market. Leading Indian companies include Opto Circuits, Corning India, BPL Healthcare, Trivitron diagnostics among others.

► Nutraceutical

Nutraceutical is an evolving segment in India. More and more pharmaceuticals, Fast Moving Health Goods (FMHG), over the counter (OTC) and Fast Moving Consumer Goods (FMCG) companies are entering into this segment. Companies are focusing on this segment mainly as preventive therapy rather than curative therapy.

A change in eating habits has been one of the most critical consequences of changing lifestyles in India. Awareness about health care is growing and pharmaceutical companies are betting big on nutraceutical sector. Several pharma companies are introducing products in this category and predict a significant increase in their profits from this segment. Elder Pharma leads the pack while other major players in the nutraceutical segment include Wockhardt, Plethico, Glenmark and Troikaa Pharmaceuticals.

"Companies are focussing on this segment mainly as preventive therapy... The Indian nutraceutical market could grow to \$2.50 billion in 2016

The nutraceutical market comprises of food supplements (also called functional foods) vitamins and minerals supplements. Currently, food supplements constitute about 60% of the market, with vitamins/minerals supplements contributing the balance. The Indian nutraceutical market valued at \$1.48 billion in 2011 could grow to \$2.50 billion in 2016. According to a report by Frost and Sullivan, over the next few years, functional foods will be the fastest growing category followed by dietary supplements.



► Report on Health Care is a compilation on industry sector reports available in the public domain. These include, among others, the following:
<http://tradecommissioner.gc.ca/india-inde/market-reports-etudes-de-marches/index.aspx?lang=eng>
<https://www2.deloitte.com/content/dam/Deloitte/global/Documents/Life-Sciences-Health-Care/gx-lshc-2015-health-care-outlook-india.pdf>
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The concept of Smart Cities has entered the lexicon of Indian policy makers in 2014, when the National Democratic Alliance government led by Bharatiya Janata Party (BJP) won the general elections and Hon. Narendra Modi was elected the Prime Minister.

Under his vision and leadership, the Ministry of Urban Development of the Government of India constituted a special Smart Cities Mission. The Mission's main agenda was to develop a set of parameters to develop 100 Indian cities to make them citizen friendly and sustainable through the use of technology.

"The goal of building a smart city is to improve the quality of life by using technology to improve the efficiency of services and meet residents' needs"

A smart city uses information and communication technologies (ICT) to enhance quality, performance and interactivity of urban services, to reduce costs and resource consumption and to improve contact between citizens and government. The goal of building a smart city is to improve the quality of life by using technology to improve the efficiency of services and meet residents' needs. Business drives technology and large-scale urbanization drives innovation and new technologies.

Technology is driving the way city officials interact with the community and the city infrastructure. Through the use of real-time systems and sensors, data are collected from citizens and objects - then processed in real-time. The information and knowledge gathered are keys to tackling inefficiency. Technology can be used as an enabler to tell what is happening in the city, how the city is evolving, and how to enable a better quality of life.

Information Marketplace: The New Economies of Cities, a 2011 report published jointly by The Climate Group, ARUP, Accenture and Horizon defines a Smart City thus: "A city that uses data, information and communications technologies strategically to:

- ▶ Provide more efficient, new or enhanced services to citizens
- ▶ Monitor and track government's progress towards policy outcomes, including meeting climate change mitigation and adaptation goals
- ▶ Manage and optimise the existing infrastructure, and plan for new more effectively
- ▶ Reduce organizational silos and employ new levels of cross-sector collaboration
- ▶ Enable innovative business models for public and private sector service provision

The report states that "By aligning the interests of stakeholders, employing new technologies and new market mechanisms, cities will be better able to obtain the full value of the smart city."

'Smart' holds the promise of finding new ways for citizens get the service they

crave, without using exponentially more resources. The marriage of technology with the physical and built environment enables more efficient construction and management of infrastructure, and the potential to change behaviour for personal or public good.

The SMART 2020 Report, the definitive report on ICT and climate change, highlights the promise created by the convergence of the environment and digital infrastructure. The report found that globally, ICT-enabled solutions of smart grid, smart buildings, smart logistics and industrial processes can potentially reduce urban global greenhouse gas emissions by as much as 7.8 gigatonnes in 2020 – a reduction larger than total emissions produced by China in 2010. In economic terms, ICT enabled energy efficiency could translate into over Euro600billion worth of cost savings for the public and private sector.

Sectors that have been developing smart city technology include government services, transport and traffic management, energy, health care, water, innovative urban agriculture and waste management. Smart city applications are developed with the goal of improving the management of urban flows and allowing for real time responses to challenges.

Major technological, economic and environmental changes have generated interest in smart cities, including climate change, economic restructuring, and the move to online retail and entertainment, ageing populations, and pressures on public finances.

The European Union (EU) has devoted constant efforts to devising a strategy for achieving 'smart' urban growth for its metropolitan city-regions. The EU has developed a range of programmes under Europe's Digital Agenda. In 2010, it highlighted its focus on strengthening innovation and investment in ICT services for the purpose of improving public services and quality of life.

ARUP estimates that the global market for smart urban services will be \$400 billion per annum by 2020.

SMART CITIES IN INDIA

India's Smart Cities Mission is an urban renewal and retrofitting program by the Government of India with a mission to develop 100 cities all over the country making them citizen friendly and sustainable. The Union Ministry of Urban Development is responsible for implementing the mission in collaboration with the state governments of the respective cities. The government of India under Prime Minister Narendra Modi has a vision of developing 100 smart cities as satellite towns of larger cities and by modernizing the existing mid-sized cities.

The 100 potential smart cities were nominated by all the states and union territories based on Stage 1 criteria, prepared smart city plans which were

"India's Smart Cities Mission is an urban renewal and retrofitting program by the Government of India with a mission to develop 100 cities all over the country"

evaluated in stage 2 of the competition for prioritizing cities for financing. In the first round of this stage, 20 top scorers were chosen for financing during 2015-16.

These cities are:

S. No.	Names of Cities	Shortlisted Name of State/UT
1	Bhubaneswar	Odisha
2	Pune	Maharashtra
3	Jaipur	Rajasthan
4	Surat	Gujarat
5	Kochi	Kerala
6	Ahmedabad	Gujarat
7	Jabalpur	Madhya Pradesh
8	Visakhapatnam	Andhra Pradesh
9	Sholapur	Maharashtra
10	Davangere	Karnataka
11	Indore	Madhya Pradesh
12	New Delhi	New Delhi
13	Coimbatore	Tamilnadu
14	Kakinada	Andhra Pradesh
15	Belagavi	Karnataka
16	Udaipur	Rajasthan
17	Guwahati	Assam
18	Chennai	Tamilnadu
19	Ludhiana	Punjab
20	Bhopal	Madhya Pradesh

The remaining will be asked to make up the deficiencies identified by the Apex Committee in the Ministry of Urban Development for participation in the next two rounds of competition. 40 cities each will be selected for financing during the next rounds of competition.

Smart cities are projected to be equipped with basic infrastructure and will offer a good quality of life through smart solutions. Assured water and power supply, sanitation and solid waste management, efficient urban mobility and public transport, robust IT connectivity, e-governance and citizen participation along with safety of its citizens are some of the likely attributes of these smart cities.

FINANCE FOR SMART CITIES

A total of ₹980 billion (US\$14 billion) has been approved by the Indian Cabinet for development of 100 smart cities and rejuvenation of 500 others. For the smart cities mission, ₹480 billion (US\$7.1 billion) and for the Atal Mission for Rejuvenation and Urban Transformation (AMRUT), a total funding of ₹500 billion (US\$7.4 billion) has been approved by the Cabinet.

In the 2014 federal budget of India, Finance Minister Hon. Arun Jaitley allocated ₹70.16 billion (US\$1.0 billion) for the 100 smart cities. However, only ₹9.24 billion (US\$140 million) could be spent out of the allocated amount till February 2015. Hence, the 2015 Union budget of India allocated only ₹1.43 billion (US\$21 million) for the project.

First batch of 20 cities selected in the second stage of competition will be provided with central assistance of ₹2 billion (US\$29 million) each during this financial year followed by ₹1 billion (US\$15 million) per year during the next three years. The remaining money has to come from the states, urban bodies and the consortium that they form with corporate entities.

Also, 10 per cent of budget allocation will be given to states / union territories as incentive based on achievement of reforms during the previous year. Urban Development Ministry had earlier released ₹2 crore (US\$290,000) each to mission cities for preparation of Smart City Plans.

CANADA'S EXPERIENCE IN SMART CITIES

Canada is leading in this sector; there is increased awareness across the country regarding the benefits of smart infrastructure such as smarter electrical grid systems. Factories in Canada heavily rely on coal for their operations but are now looking to embrace advanced electrical grid technologies such as renewable energy, automated distribution, and advanced battery storage. One example is Canada's city of Ontario, which has recently accomplished moving to a coal-free electrical grid.

"Being a leader, there is increased awareness across Canada regarding the benefits of smart infrastructure such as smarter electrical grid systems"

Canada also sees the benefit of smart grids as it consists of interconnected loads and distributed energy resources that can help identify and meet energy demands. Also, with advanced technologies, demand-response programs can be automated which allows savings in energy bills.

POLICY RESEARCH

It may be pertinent at this stage to understand the Canadian experience in developing Smart Cities. While Toronto (Greater Toronto Area) clearly has an edge in the development of technologies that go into the making of Smart Cities, other Canadian cities have also been working hard to develop a policy framework to enable rapid development in this sphere.

A 2012 Laval University study on Smart Cities is indicative of Canada's head start in this sphere. The project was funded by the Social Sciences and Humanities Research Council of Canada, and its duration was 2010-2012. Quebec City was among the six global cities that participated in the project. The others were New York, Philadelphia, and Seattle (USA), Mexico (Mexico), Macao and Shanghai (China).

The study examined eight projects that were initiated in Quebec City. These were:

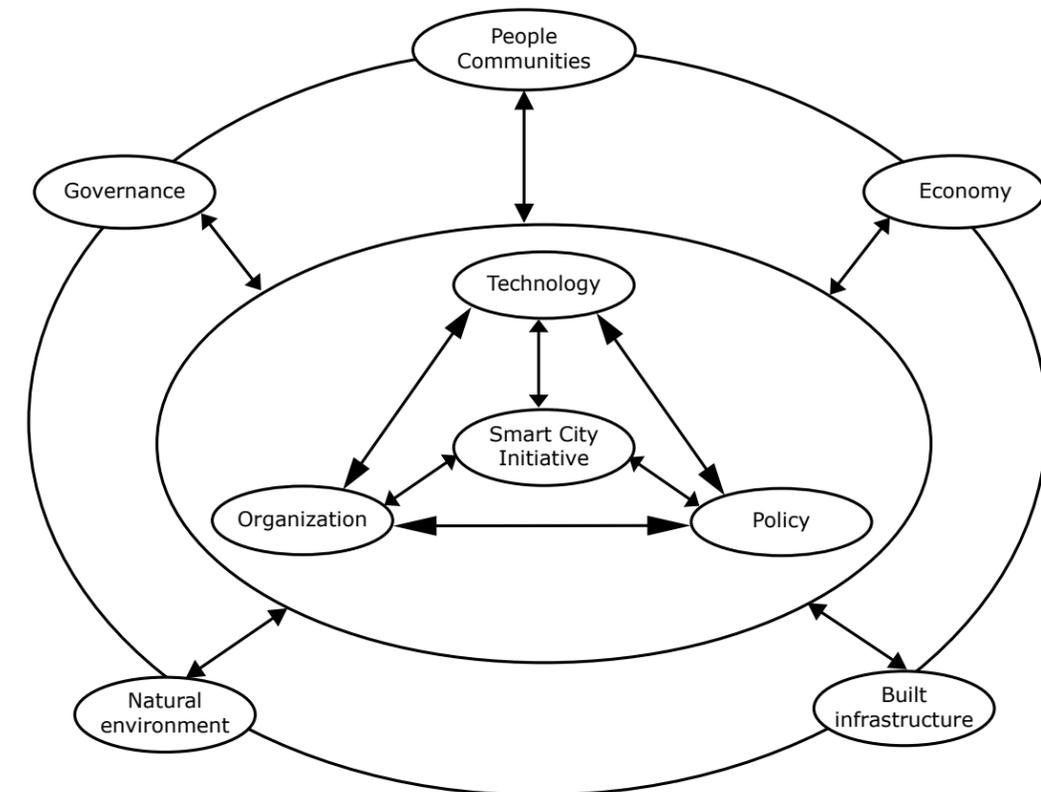
- ▶ Project 1: Wi-Fi deployment (2007)
Objectives: Connecting Quebec City to a free Wi-Fi service
- ▶ Project 2: Inter cities Network (2010)
Objectives: Connecting major cities in the province of Quebec
- ▶ Project 3: Snow cleaning info (2010)
Objectives: Citizens send a text message to know when their street will be cleaned
- ▶ Project 4: Quebec City website (2009)
Objectives: Developing a mobile version of the City's web site
- ▶ Project 5: Optimizing snow cleaning (2011)
Objectives: Using sensors at each truck to control their work
- ▶ Project 6: Infrastructure management system (2009)
Objectives: Integrating different information systems to coordinate infrastructure management activities
- ▶ Project 7: Public transportation (2011)
Objectives: Developing a new plan for public transportation
- ▶ Project 8: Open data (2011)

Objectives: How Quebec City can make data available to citizens

The research results are divided into the following deliverables:

"The objective of the study by Laval University was 'How Quebec City can make data available to citizens?' The results are divided into eight deliverables

- ▶ Technology
- ▶ Management and organization
- ▶ Policy Context
- ▶ Governance
- ▶ People and communities
- ▶ Economy
- ▶ Built infrastructure
- ▶ Natural Environment



TECHNOLOGY

- * Smart city initiatives involve adopting new systems.
- * A single database system for a number of different government programs is used to integrate and share information.
- * Social media and smart phones are drawing attention.
- * City governments' attention to smart phones as a possible way to bridge a digital divide is growing.
- * Various mobile services through short text messaging and smart phone applications include collecting requests for municipal services and sending residents alerts of city information.
- * All four different cities have experienced financially insufficient support stemming from budget constraints.
- * Some city governments lose human resource, particularly technology staff, and others miss an opportunity to update and upgrade technical systems that are pivotal to smart city initiatives

MANAGEMENT AND ORGANIZATION

- * There are diverse organizational forms: a committee, one particular city agency or department takes the lead to organize a smart city initiative, or a collaborative structure.
- * The role of communication and interaction is central to managing and organizing smart city initiatives : sharing information, resources, and sometimes authorities.
- * Smart city initiatives may result in change in organizational culture:

changes towards a more service-friendly and participative orientation in the organizational culture.

- * Public management is increasingly being driven by data and information: more data and information can open governmental internal processes to the public.

- * These changes consistently increase transparency, integrity, and accountability to a substantial extent.

- * The role of the top management in envisioning a smart city and championing smart city initiatives.

- * An obvious managerial challenge indicated budgetary constraints because some initiatives have not been full-blown due to limited funding.

POLICY CONTEXT

- * Interdepartmental agreements are considered as policy requirements for interdepartmental workings for smart city initiatives.

"People are getting more involved in smart city initiatives because they know those initiatives have a great impact on the quality of their life"

- * The mayor's policy directions shape the city's overall strategies to make it smarter.

- * The mayor's political position also impacts policy directions that outline smart city initiatives.

- * In one city, the mayor's administrative leadership does not belong to any political affiliation (independent).

In other cities, the mayor's political affiliation may be one of the reasons for strong support for government-driven smart city initiatives from the public and groups.

GOVERNANCE

- * Participatory, hierarchical, and/or hybrid models are found in various initiatives.

- * Interviewees identified the committee system as hierarchical and effective for relatively swift decision making.

- * In another city, there is no formal governance body for a smart city initiative, but regular interdepartmental meetings.

- * Smart city initiatives often entail intersectoral as well as interagency collaboration.

- * In addition, governments increasingly pay attention to citizen participation in decision making, monitoring city services, and providing feedback.

PEOPLE AND COMMUNITIES

- * One meaning of a city's smartness may be to better know citizens' wants and needs and their opinions.

- * One interviewee's comment is noteworthy: "We want to be able to use constituents as eyes and ears to tell us what's going on."

- * People are getting more involved in smart city initiatives because they know those initiatives have a great impact on the quality of their life.

ECONOMY

- * Interviewees considered a smart city as a city that intelligently combines its resources to provide the best economic and social conditions.

- * Some smart city initiatives aim at fostering economic growth and enhancing a city's competitiveness in local and global markets.

- * Smart city initiatives should find more innovative ways and solutions in order to overcome economic challenges such as budget cuts and financial recession across countries.

- * One city had looked beyond its boundaries and had actively teamed up with neighboring municipalities in order to make the entire region more competitive and attractive.

BUILT INFRASTRUCTURE

- * We heard more about information and communication infrastructures than other physical infrastructures.

- * Interviewees said IT infrastructures enable and facilitate various smart city initiatives. These information and communication infrastructures create capacity to deliver city services seamlessly to residents and businesses.

- * Some smart city initiatives aim to develop and further improve those infrastructures. As a case in point, in one city multi-agency efforts were underway to help build a smart power grid, which is capable of dramatically reducing the loss of energy and making the smart management of the entire power grid and its various sub-grids as well as individual buildings and households a reality.

OPPORTUNITIES FOR CANADA-INDIA COLLABORATION

There are tremendous opportunities for Canada and India to collaborate in this sphere. Soon after the Government of India launched the Smart Cities Mission, the Canadian High Commission in New Delhi swung into action to promote bilateral economic opportunities in this sphere. Consul General for Canada in Bengaluru (responsible for Canada's relations in Southern India), Sidney Frank led a business mission to Andhra Pradesh and Telangana on March 30-31, 2015. The delegation comprised 16 Canadian infrastructure and clean technology companies looking to contribute to the development of Indian Smart Cities.

The delegation participated in a day long workshop on Shaping the South - Emerging Smart City Opportunities in Telangana and Andhra Pradesh, organized by the Canadian Trade Commissioner's Service, and explored collaboration opportunities with Indian business partners and key local government and industry contacts.

Another highlight of the visit was the launch of the publication Building India's Smart Cities: A Canadian PPP Approach, which presents Canadian success stories related to Private Public Partnerships (PPP) and Canada's approach to building thriving urban centers using the PPP model.

On the eve of his departure, Consul General Frank said: "Canada is eager to engage more closely with India as it strives to develop world class cities. We see

"Soon after India launched the Smart Cities Mission, the Canadian High Commission swung into action to promote bilateral economic opportunities"

great opportunities for innovative Canadian companies to contribute their products and services in support of India's Smart City Framework. Canadian companies notably have significant expertise in project management and engineering services; transportation; water and waste water management; solid waste management; and safety, security and disaster management. I hope that our visit will result in new partnerships and further strengthen the relationship between our two countries."

In January 2016, when Ontario Premier Hon. Kathleen Wynne led a 70-member delegation on the Ontario Business Mission to India, she met with the Indian Prime Minister Hon. Narendra Modi to discuss Ontario's involvement in the Smart Cities project. In a statement released by the Premier's office, Hon. Wynne said, "In particular, we discussed how Ontario is ideally positioned to help support Prime Minister Modi's Smart Cities Initiative, a program that will invest more than US\$1 trillion over 20 years in sustainable infrastructure across India. Ontario has valuable expertise that can help India reach its sustainable development and urban renewal goals. For example, we are making record-breaking investments in infrastructure, and our province is a North American leader in fighting climate change, creating innovative cleantech, and developing renewable energy."

"Ontario has valuable expertise that can help India reach its sustainable development and urban renewal goals, says Premier Kathleen Wynne"

OPPORTUNITIES FOR CANADIAN COMPANIES

In recent months, several Canadian companies have signed collaboration agreements with Indian companies to develop infrastructure for Smart Cities. Among these are:

- ▶ Unique Broadband Systems Limited and Astra Microwave Products Limited established a joint venture to provide broadcasting services, satellite uplinking and medical imaging products to India and other regional markets.
- ▶ DataWind signed a Memorandum of Understanding (MOU) with the Government of Telangana to open a manufacturing base in Hyderabad, which is expected to be in production within months.
- ▶ Solantro and Smarttrak announced that they will collaborate on the development of electric power solutions, renewable energy and micro inverters.
- ▶ Kinectrics and Nuclear Fuel Complex signed an MOU for an advanced partnership in nuclear energy initiatives.
- ▶ McMaster University signed a Research Partnership Agreement with the Indian Institute of Technology (IIT) - Hyderabad, which will generate opportunities to create intellectual property through innovation and to commercialize research outcomes.
- ▶ eCAMION, Ryerson University Centre for Urban Energy and L&T Technology Services will work with the Tamil Nadu Generation and Distribution Corporation and Anna University-Ryerson University Urban Energy Centre to launch India's first community energy storage system at Anna University on the Tamil Nadu state

grid.

▶ Seneca College and College of Engineering Pune announced that they will launch an innovative project competition in the area of health care through Seneca's incubator HELIX (Health Entrepreneurship and Lifestyle Innovation Xchange). This tri-party MOU, also with the City of Markham, will promote global entrepreneurship among young entrepreneurs from India and Ontario.

▶ Clearford Water Systems and Essel Group announced that they will work together to bring an all-in-one wastewater collection and treatment system to India. This includes identifying a village for a demonstration site.

"Smart Cities initiative is a game changer that will propel Indian infrastructure development, and provide an impetus to integrated urban development"

CONCLUSION

Smart Cities initiative in India is a game changer that will propel Indian infrastructure development, and provide an impetus to integrated urban development. Canadian federal and provincial governments, as well as Canadian cities have a tremendous opportunity to be involved in this trillion dollar initiative. Collaborations at different levels have commenced, and will continue for a long time. The Indo-Canada Chamber of Commerce (ICCC) will take initiatives to further facilitate the process of collaborations.



- ▶ Report on Smart Cities is a compilation on industry sector reports available in the public domain. These include, among others, the following:
 - http://www.canadainternational.gc.ca/italy-italie/eyes_abroad-coupdoeil/SmartCity.aspx?lang=eng
 - https://www.google.ca/url?sa=t&rct=j&q=&esrc=s&source=web&cd=19&cad=rja&uact=8&ved=0ahUKEwj8-NjyIbLAhXBkh4KH5fBj44ChAWCFswCA&url=https%3A%2F%2Fwww.itis.ulaval.ca%2Ffiles%2Fcontent%2Fsites%2Ffitis%2Ffiles%2Ffichiers%2FVID_SMellouli.pdf&usq=AFQjCNHuJYwTtMbqDBxgJ3Q-MXEV1mwORw&sig2=6ilG1IWI14f07HUp9VIOUw&bvm=bv.114733917,d.dmo
 - <http://carleton.ca/india/cu-events/smart-cities-forum-2015/>
 - <http://www.techvibes.com/blog/how-canadas-smart-cities-can-reach-their-full-potential-2014-05-30>
 - https://en.wikipedia.org/wiki/Smart_Cities_Mission
 - <http://smartcities.gov.in/>

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According to the Tourism Industry Association of Canada, travel and tourism includes transportation, accommodations, food and beverage, meetings and events, and attractions, such as festivals, historical and cultural institutions, theme parks, and nature settings.

The global tourism economy is valued at over \$1 trillion and produces one in every 12 jobs in the world. In 2013, global tourism accounted for over 1 billion international overnight visits, representing a 5% growth from the prior year.

Tourism and hospitality sector is a major source of revenue for both Canada and India. This analysis examines the sectors in both Canada and India, and also looks

"The tourism economy is valued at over \$1 trillion and produces one in every 12 jobs. This sector is a major source of revenue for Canada and India

at the possible collaboration between the two countries in the sector. Canada's tourism industry is an important contributor to Canadian economic growth. This industry – which comprises hospitality and travel services to and from Canada – is a multi-billion-dollar business that employs hundreds of thousands of Canadians.

In the Indian context, the total contribution by travel and tourism sector to India's GDP is expected to increase from US\$ 136.3 billion in 2015 to US\$ 275.2 billion in 2025. Travel and tourism is the third largest foreign exchange earner for India. In 2014, the country managed foreign exchange earnings of USD 19.7 billion from tourism.

TOURISM AND HOSPITALITY IN CANADA

In Canada, only 20% of tourism revenue (about \$16 billion) is generated from inbound visits; the remainder represents what Canadians spend on domestic and foreign tourism activities. According to the Canadian Tourism Commission, the Canadian tourism industry operates with the support of all levels of government and the participation of over 170,000 tourism businesses. In 2013, this industry:

- ▶ Contributed an estimated \$84 billion to the economy, up 2% from 2012
- ▶ Represented an estimated 2% of Canada's Gross Domestic Product (GDP)
- ▶ Produced 619,000 jobs, up 1.5% from 2012

It should be noted that these increases continue the trend of growth observed since 2010.

VISITORS TO CANADA

Overnight inbound visitors to Canada have been characterized as follows: In 2013, Canada had 16.6 million inbound overnight visitors, up 2% from 2012; these visitors spent \$16.4 billion, up 2.5% from the previous year. The most popular provinces for international visitors in 2012 were Ontario, British Columbia and Quebec. Emerging markets contributed strongly to the growth in tourism revenue, with, in 2013, revenue from visitors from Brazil increasing by 5.2% and visitors from China increasing by a notable 24.2%. Visitors from emerging markets (e.g., Asia, South America) spend more per trip and tend to stay longer than those from Canada's traditional tourism markets (e.g., Western Europe, U.S.).

Tourists coming to Canada are trending younger than in previous years – the number of visitors aged 24 years and younger increased by 24% between 2011 and 2012 and represented one in five overseas visitors. The rise in Canada's popularity with Chinese travellers is particularly noteworthy, as China is now Canada's third largest overseas tourism source after France and the U.K. This is in part attributable to Canada's having been granted Approved Destination Status by the Chinese government; since 2010, overnight visits from China have nearly doubled to over 330,000 visitors.

"The United States of America (USA) is by far the biggest source of Canada's tourism visitors; it is also the most visited foreign destination by Canadians

According to the World Economic Forum's Travel & Tourism Competitiveness Report 2013, Canada ranked eighth out of 140 countries studied, up from ninth place in 2011. Canada was found to be very strong in the areas of natural resources, number of World Heritage sites, highly qualified hotel staff, and number of international festivals and exhibitions. Notably, Canada was ranked first in terms of air transport infrastructure. In contrast, Canada was found to be deficient in several areas, such as price competitiveness (124th) and visa requirements (106th).

Furthermore, a 2012 report prepared by the Tourism Industry Association of Canada noted that since 2000, Canada's rank as a destination for international tourism had fallen from eighth place to 18th place in 2011. To help reverse this trend, the Association identified three key areas for structural change:

- ▶ Funding: The government's tourism marketing budget is not sufficient for Canada to be internationally competitive.
- ▶ Access: Various additional fees and taxes make the cost of air travel to Canada less attractive than to other jurisdictions; visa requirements are also too onerous.
- ▶ Investment: Canada's domestic tourism industry is not experiencing capital investment, but capital is flowing out of Canada to foreign tourism markets showing growth.

These assessments suggest that even though Canada is doing well in certain areas, other jurisdictions may be greatly improving their ability to attract international tourism. Changing trends in consumer preferences may also play a role in determining which destinations may be more popular than others at any particular time.

CANADA-UNITED STATES TOURISM

Given its proximity and long shared border, the United States is by far the biggest source of Canada's tourism visitors; it is also the most visited foreign destination by Canadians. Since 2000, the three U.S. states most visited by Canadians have been New York, Florida (where Canadians spend the most money) and Washington; over the same period, the top three U.S. states that provided Canada with the most visitors were New York, Michigan and Washington.

GOVERNMENT'S ROLE

The Canadian Tourism Commission (CTC) is a federal Crown corporation responsible for national tourism marketing and is governed by the Canadian Tourism Commission Act. In 2013, CTC received \$63 million in federal appropriations, compared with \$77 million for 2012. CTC focuses its efforts mainly on the following countries: Australia, Brazil, China, France, Germany, India, Japan, Mexico, South Korea, the United Kingdom and the United States.

In 2011, the federal government launched the Federal Tourism Strategy, which aims to bring all levels of government and industry together to strengthen the Canadian tourism industry. With 20 federal department and agency partners, the Strategy aims to increase tourism revenue to \$100 billion by 2015 (from its current level of \$84 billion).

"The tourism industry has shown steady overall growth during the past few years, strengthening its contribution to Canada's economic well-being"

Similar to recent budgets, the 2014 federal budget did not have any specific major announcements related to increased funding for tourism in general; however, it included commitments to improve transportation infrastructure in the territories to help address various issues, including increased demand for ecotourism in Canada's North.

Several federal government institutions also play key roles in shaping the outcome of Canada's tourism economy. For example, the federal government is responsible for:

- ▶ airports;
- ▶ establishing ticket taxes and travel tariffs;
- ▶ providing customs and border services; and
- ▶ addressing matters related to national security.

The National Capital Commission and Parks Canada also help ensure that iconic Canadian places are protected and preserved for current and future visitors to enjoy. Provincial and territorial governments also help develop and promote tourism in Canada. The Canadian tourism industry has shown steady overall growth during the past few years, strengthening its contribution to Canada's economic well-being. And although the United States continues to be Canada's biggest tourism trading partner, the federal government is shifting its focus to the more growth-oriented, lucrative emerging markets to better diversify Canada's tourism interests.

HOSPITALITY

Canadian Hotel Statistics

- ▶ 8,139 properties
- ▶ 442,552 rooms
- ▶ 288,000 employees

- ▶ 64% Occupancy Rate (2015 Forecast)
- ▶ \$141 Average Daily Rate (2015 Forecast)
- ▶ \$90 RevPAR (2015 Forecast)
- ▶ \$17.5 billion National Accommodation Revenue (2014)
- ▶ Generated value added of \$16.2 billion (2014)
- ▶ Generated tax revenue of \$7.6 billion for all three levels of government including \$3.3 billion to the Federal Government. (2014)

Canadian hotel transaction volume reached \$1.46 billion in 2014, marking the year as the second highest (after 2013) in deal volume since the last peak in 2007. In 2013, volume was largely driven by the sale of the \$765 million five-property Westin Canadian Hotel Portfolio which represented nearly 40% of overall volume for the year. When this transaction is removed, volume in 2014 grew over 28% year-over-year. The dynamic investment market was aided by debt sources eager to finance acquisitions as well as a diverse group of buyers and sellers motivated to take advantage of ideal market conditions, including buy-side demand from cross border groups— most notably Mainland China.

Of recent, Canada's tourism sector has been overly reliant on domestic travellers. In 2000, international travellers made up a 33% share of all travel in Canada. By 2013, this share dropped to 19%. This drop in international travel demand has had negative consequences for Canada's hotel industry and travel sector at large. Canada's hotel performance has eroded as a result of this drop in international demand. Average Daily Rate (ADR) and Revenue per Available Room (RevPAR), both key indicators for the health of the accommodations sector, are not meeting their potential for the industry. Moreover, while Canada saw the most hotel transactions in history in 2013, the market has also been experiencing a higher number of property conversions, fewer builds and fewer brand expansions relative to other competitive markets.

The Canadian hotel industry took a large hit in investments during the recession but seems to be rebounding at a cautious pace. However, if comparing the price per room in 2013 dollars, investments are still worth 26% less than they were before the recession. Investment volume tells the same story: there are definite signs of recovery but still less than half of 2007 volumes.

TOURISM AND HOSPITALITY IN INDIA

India is a large market for travel and tourism. It offers a diverse portfolio of niche tourism products - cruises, adventure, medical, wellness, sports, MICE, eco-tourism, film, rural and religious tourism. India has been recognised as a destination for spiritual tourism for domestic and international tourists.

Total contribution by travel and tourism sector to India's GDP is expected to increase from US\$ 136.3 billion in 2015 to US\$ 275.2 billion in 2025. Travel and tourism is the third largest foreign exchange earner for India. In 2014, the country managed foreign exchange earnings of USD 19.7 billion from tourism.

The launch of several branding and marketing initiatives by the Government of India such as Incredible India! and Athiti Devo Bhava have provided a focused impetus to growth.

The Indian government has also released a fresh category of visa - the medical visa or M visa, to encourage medical tourism in the country. India is expected to receive nearly half a million medical tourists by 2015, implying an annual growth of 30 per cent. In November 2014, Government of India launched Tourist Visa on Arrival (TVoA) which is enabled by Electronic Travel Authorization (ETA), known as the e-Tourist Visa scheme for 43 countries. The facility is likely to enable 7.5 percent growth in the tourism sector in 2015.

The Government has also been making serious efforts to boost investments in tourism sector. In the hotel and tourism sector, 100 per cent FDI is allowed through the automatic route. A five-year tax holiday has been offered for 2, 3 and 4 star category hotels located around UNESCO World Heritage sites (except Delhi and Mumbai). The investment in tourism sector is expected to be US\$ 12.4 billion in the 12th Five Year Plan; of these, private investments are likely to total US\$ 9.2 billion.

"Total contribution by travel and tourism sector to India's GDP is expected to increase from US\$ 136.3 billion in 2015 to US\$ 275.2 billion in 2025

Tourism in India accounted for 6.88% of the GDP during 2012-13, and tourism the third largest foreign exchange earner for the country. India registered 7.7 Million FTAs in 2014, registering an annual growth of 10.2% over the previous year. The FEEs from tourism during 2014 were US\$ 20.236 Billion. India is 15th in the world in terms of International Tourism Receipts with a share of 1.58% of the world's tourism receipts. Tourism projects entailing investment of ₹200 crore and above have been included in the harmonised list for grant of infrastructure status.

The centrally funded scheme of Swadesh Darshan and PRASAD provide for introducing suitable Public Private Partnership (PPP) for improved sustainability of the projects. The Viability Gap Funding may be provided under the schemes in accordance with the relevant guidelines/instructions of the Government.

Tourism is a big employment generator – every US\$ 1 Million invested in tourism creates 78 jobs. Tourism is the third largest foreign exchange earner after gems, jewellery and readymade garments. In 2014, FEEs from tourism were US\$ 20.236 Billion as compared to US\$ 18.445 Billion in 2013, registering a growth of 9.7% in Indian Rupee terms, FEEs from tourism registered a growth of 14.5% rising from ₹1,07,671 crore to ₹1,23,320 crore. India registered 7.7 Million FTAs in 2014, registering an annual growth of 10.2% over the previous year.

The number of domestic tourist visits in India during 2014 was 1281.95 million as compared to 1145.28 million in 2013, recording a growth rate of 11.93%. FTAs (Provisional) from January to July 2015 were 4.48 million, an increase of 4.8%

over the same period of previous year. FEEs (Provisional) from January to July 2015 was ₹71,754 crore, an increase of 6.9% over the same period of previous year.

GROWTH DRIVERS

A growing recognition of tourism's contribution to employment and economic growth, the availability of better infrastructure, focused marketing and promotion efforts, liberalisation of air transport, the growth of online travel portals, growing intra-regional cooperation and more effective PPPs are seen as key drivers for tourism in the next decade. More than half of the Ministry of Tourism's Plan budget is channelized for funding the development of destinations, circuits, mega projects as well as rural tourism infrastructure projects.

The Tourist Visa on Arrival (TVoA) was renamed as Electronic Travel Authorisation (ETA) on 15th April, 2015. Currently the ETA facility is available for 113 countries. This is expected to have a significant positive impact on foreign tourist arrivals in India. The launch of several branding and marketing initiatives by the Government of India such as Incredible India! and Athiti Devo Bhava provides a focused impetus to growth. Recently, the Indian government has also released a fresh category of visa - the medical visa or M visa, to encourage medical tourism in India.

"The number of domestic tourist visits in India during 2014 was 1281.95 million as compared to 1145.28 Million in 2013, recording a growth of 11.93%

POLICY

The Outlay for the Ministry of Tourism is ₹1483.20 crore. 100% FDI is allowed under the automatic route in tourism and hospitality, subject to applicable regulations and laws. 100% FDI allowed in tourism construction projects, including the development of hotels, resorts and recreational facilities. The National Tourism Policy's vision is to enhance employment potential within the tourism sector as well as to foster economic integration through developing linkages with other sectors; policy objectives include positioning the tourism sector as a major engine of economic growth, positioning India as a global brand, acknowledging the critical role of private sector and creating integrated tourism circuits.

INCENTIVES

An investment-linked deduction under Section 35 AD of the Income Tax Act is in place for establishing new hotels in the 2-star category and above across India, thus permitting a 100% deduction in respect of the whole or any expenditure of a capital nature excluding land, goodwill and financial instruments incurred during the year. Incentives offered by state governments include subsidised land cost, relaxation in stamp duty, exemption on sale/lease of land, power tariff incentives, concessional rate of interest on loans, investment subsidies/tax incentives, backward areas subsidies and special incentive packages for mega projects. Incentives are provided for setting up projects in special areas – the North-east, Jammu & Kashmir, Himachal Pradesh and Uttarakhand.

MEDICAL TOURISM

The presence of world-class hospitals and skilled medical professionals make India a preferred destination for medical tourism. Industry chamber Assocham estimates that India's medical tourism sector is likely to more than double between 2011 and 2015, from \$980 million to \$1.8 billion. According to the Ministry of Tourism, which governs India's medical tourism industry, the percentage of foreign tourists who came to India for medical reasons increased from 2.2 percent in 2009 to 2.7 percent in 2010.

A vast, beautiful coastline, virgin forests and undisturbed idyllic islands make this a choice destination for cruise tourists. Rural tourism schemes have been implemented by the Ministry of Tourism in 2002-03 with the objective of highlighting rural life, art, culture and heritage in villages that have a core competence in art, craft, handloom, textiles and the natural environment. Eco-tourism is at a nascent stage, but there are conscious efforts to save the fragile Himalayan eco-system and the culture and heritage of indigenous people. The segment offers opportunities across various sub-segments such as timeshare resorts, convention centres, motels, heritage hotels and the like.

"The presence of world-class hospitals and skilled medical professionals make India a preferred destination for medical tourism, likely to double

Investment opportunities in the setting up of tour operations and travel agencies cater to burgeoning tourist inflow.

Foreign investors already in India include Accor (France), The Four Seasons Group (Canada), Starwood Hotels (USA), Thomas Cook (UK), Marriott Hotels (USA), Expedia (USA), Premier Travel Inn (UK), Cox & Kings (UK), Mandarin Oriental (Hong Kong), Jumeirah (UAE).

The government agencies involved in regulating the sector in India include Ministry of Tourism, Government of India, Hotel Association of India, Association of Tourism Trade Organizations, India, Federation of Hotel & Restaurants Associations of India, Indian Association of Tour Operators, Travel Agents Association of India, India Tourist Transporters Association.

CANADA-INDIA COLLABORATION

Indian nationals rank in the top 10 source countries of international visitors to Canada. In 2014, more than 135,000 visitor visas were issued to Indian citizens, and nearly 14,000 Indian citizens were issued student permits. Between January and June 2014, almost 95 per cent of visitor visas issued to Indian nationals were multiple-entry visas, allowing travelers to visit Canada as many times as they want for up to 10 years.

Canadians Travel to India – 2013 (147099), 2014 (175536), and 2015 (190000).

Government Initiatives include: Ease of Visa – E-visa announced and now in effect, Canadians traveling to India can apply online and visa issued on arrival to India. The 10 years visa announcement will also help in promoting the bilateral tourism. Canadian Embassy in India has - Three visa "Express" programs that help Indian businesspeople, tourists and students come to Canada faster include:

- ▶ Business Express expedites business travel from India with visas issued within three days with a near-perfect approval rate for those registered in the program.
- ▶ Tourist Partner Program offers a fast, simplified visa application process for tourists who use travel agencies registered with the Canadian Embassy.
- ▶ Student Partners Program fast-tracks the processing of study permits with visas issued within 13 days or less for those who study at participating Canadian educational institutions.

The Tourism and Hospitality committee of the Indo-Canada Chamber of Commerce has pledged to create awareness in the sector and the need for collaboration. India is one of the fastest-growing outbound travel markets in the world and has enormous potential as a tourism market for Canada. That is because it continues its impressive development; its middle class is expected to grow rapidly in size and wealth. International travel and tourism research predicts that India will account for 50 million outbound tourists by 2020. Therefore, Indian travelers represent a significantly growing market for Canada.



- ▶ Report on Tourism and Hospitality is a compilation on industry sector reports available in the public domain. These include, among others, the following:
<http://www.lop.parl.gc.ca/content/lop/ResearchPublications/2014-74-e.html>
<http://www.colliershotels.com/sites/default/files/15CHIR.pdf>
http://tiac.travel/_Library/documents/The_Canadian_Tourism_Industry_-_A_Special_Report_Web_Optimized_.pdf
<http://www.ibef.org/industry/indian-tourism-and-hospitality-industry-analysis-presentation>

INDIA MISSION 2016 PROGRAM HIGHLIGHTS

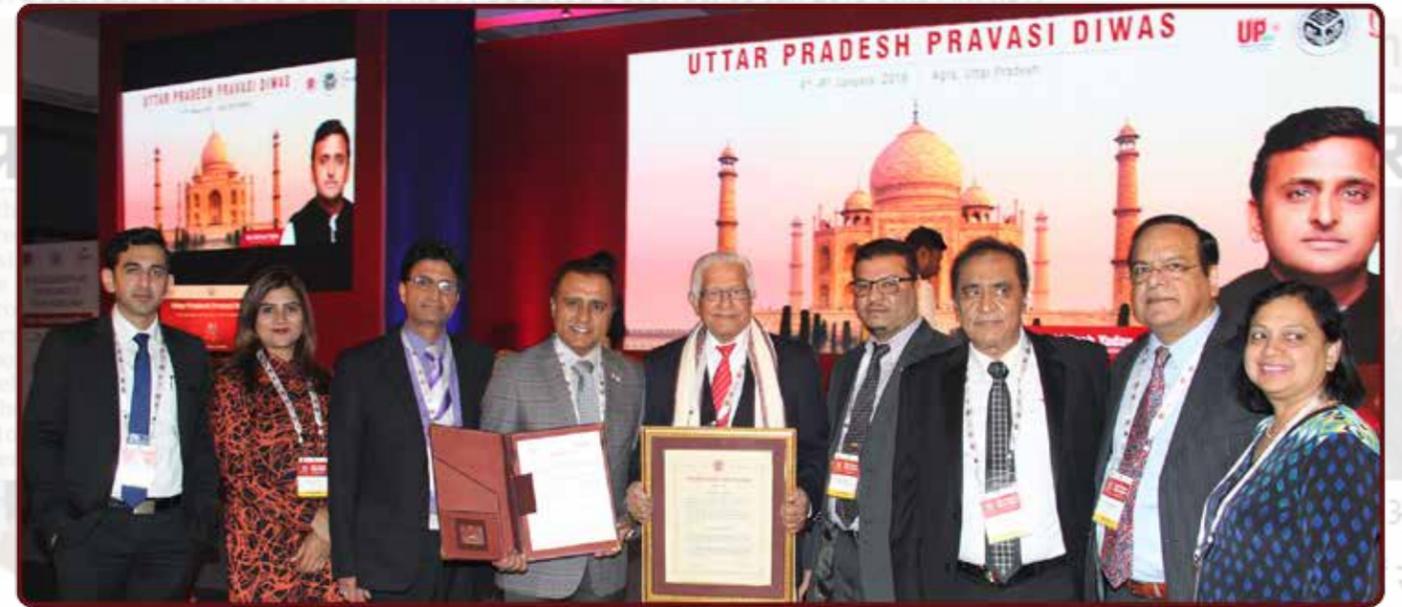
ICCC President Sanjay Makkar signing a Memorandum of Understanding (MoU) with Shri Sanjeev Saran (IAS), Principal Secretary, Government of Uttar Pradesh



Meeting with Dr. Didar Singh, General Secretary, Federation of Indian Chamber of Commerce & Industry (FICCI)



Felicitation by Government Uttar Pradesh



Meeting with Sri. Balwant Singh Ramoowalia, Hon. Cabinet Minister, Government of Uttar Pradesh



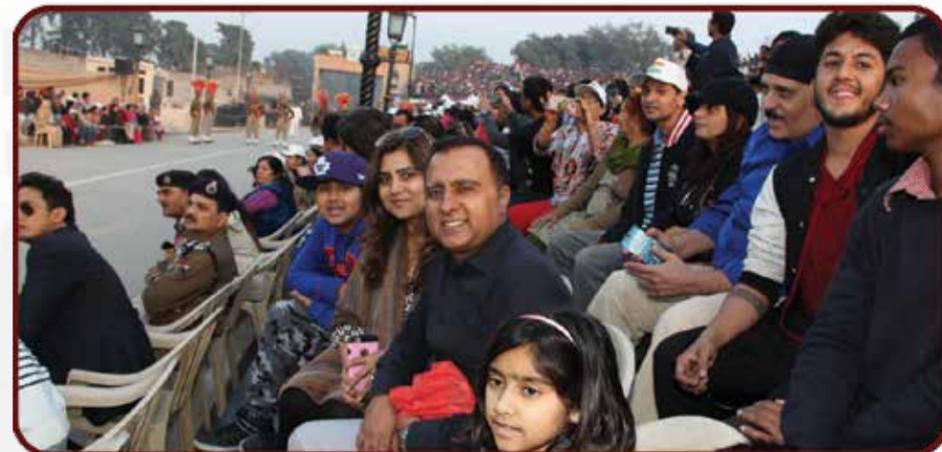
उत्तर प्रवासी दिवस में कई क्षेत्रों में सहयोग के लिए करार



Meeting with BSF Inspector General Verma



Visit to the Attari Border



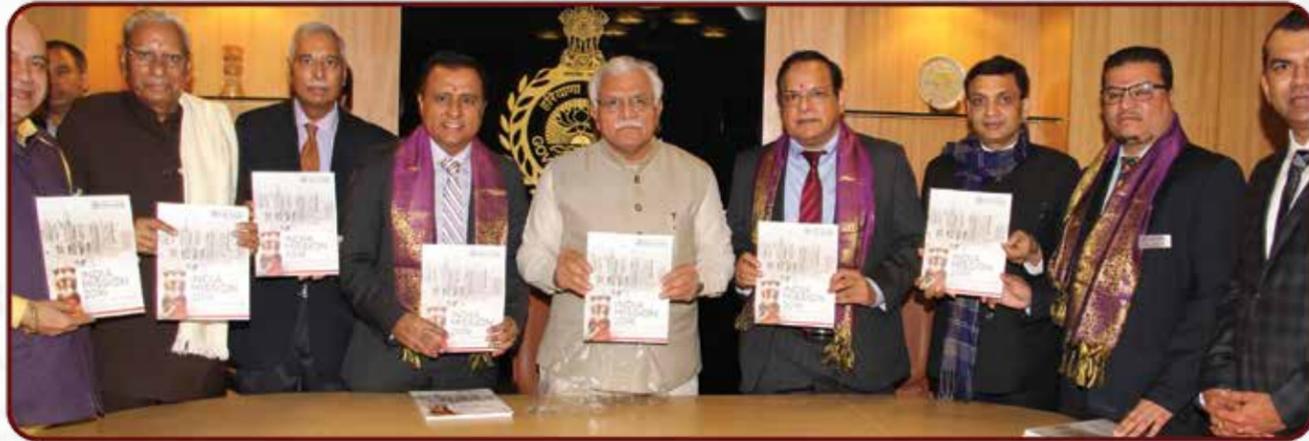
Business reception at Canada Club attended by His Excellency Nadir Patel, High Commissioner of Canada in New Delhi, and Hon. Patrick Brown, MPP and leader of PCP in Ontario



B2B Meeting arranged by CII between ICE Down and Interin



Meeting with Sri. Manohar Lal Khattar, Hon. Chief Minister, Haryana



Business roundtable with Trivandrum Chamber of Commerce & Industry



MoU with Trivandrum Chamber of Commerce & Industry



Meeting at Santhigiri Ashram



MoU between Mr. Chandrakar Kapoor and Santhigiri Ashram



Business meeting with Mr. Jiji Thomson, Chief Secretary, Kerala



Meeting with Smt. Soumini Jain, Mayor, Kochi City



Luncheon Meeting with NEST Group of Companies



Tour of the NEST Group Company



Meeting with Smt. Anandiben Patel, Hon. Chief Minister of Gujarat



Canadian delegation meets CM, invites her to Toronto

Ahmedabad: A delegation comprising 25 delegates from Canada, five delegates from the Indo-Canada Business Chamber and decision-makers from Canadian politics, met CM Anandiben Patel and invited her in June as Guest of Honour for an annual gala meet in Toronto. The objective of the India Mission will be to unite two countries to enable political and business relations, stated a release here. The Chamber has pledged to support PM Narendra Modi's vision to develop Smart Cities by sharing Canadian experiences. "Canada and India have synergies that both are willing to explore and expand. This will help build India's stand in the global market. Trade is indeed a great equaliser and we hope to make optimal utilisation of the opportunity to highlight the Indian potential and that of Gujarat," said Jaimin Shah, head the Chamber, Gujarat chapter. ENS



Meeting with Director, Tourism in Ahmedabad



Visit to Gandhi Ashram



Briefing by the Canadian Trade Office in Ahmedabad



Business reception with ICBC



Gujarat Canadian Universities should mutually collaborate for knowledge exchange: Chief Minister



Gujarati community has significantly contributed to industries in Canada



Luncheon Meeting with Neo Politan Pizza



Kite Festival in Vadodra



Business reception with AIAI



Delegation of Indo-Canada Chamber of Commerce's met CM

ઇન્ડો કેનેડા ચેમ્બર્સ ઓફ કોમર્સના પ્રતિનિધિ મંડળે CM ની મુલાકાત લીધી
 અમદાવાદ, બુધવારે ગુજરાતમાં, ઉર્જા, સ્માર્ટ સિટી, આંતર
 માળખાકીય સુવિધા ક્ષેત્રોમાં વિકાસ
 રોકાણ અર્થે આ મંડળ ગુજરાતના પ્રવાસે
 છે. આગામી જૂન ૧૬માં ઓન્ટેરીયોમાં
 ઉજવાનારા ઉદ્ઘોગ વેપાર કેન્સ્ટ્રલમાં
 ઉપસ્થિત રહેવા મુખ્યમંત્રીને નિમંત્રણ
 અપાયું હતું.



Meeting with Sri. Bharath Dangar, Mayor, Vadodra



Meeting with YES Bank



*Borders Law Firm practices exclusively
in the area of Canadian and U.S.
immigration law.*

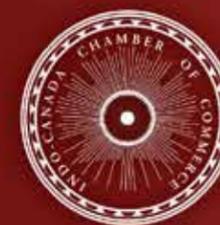
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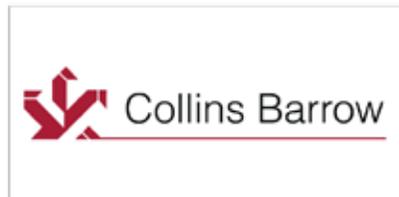
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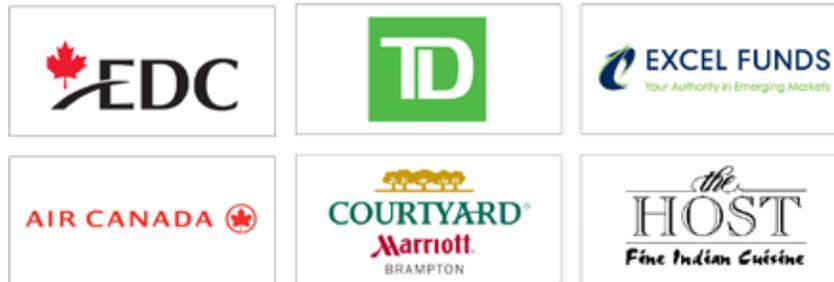
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