

# Telangana Growth Analysis



Stamp Registration

Transportation

Ts-Ipass

Secondary Research



The current government in Telangana has implemented several significant policies and initiatives to enhance economic growth, investments, and employment. Some of them include:

- 1. Industrial Policy:** The government introduced the Telangana State Industrial Project Approval and Self-Certification System (TS-iPASS) to streamline and expedite the process of obtaining clearances for setting up industries. This policy aims to attract investments, promote ease of doing business, and create employment opportunities.
- 2. T-Hub:** T-Hub is a startup incubator and innovation hub established by the government to support and nurture the startup ecosystem in Telangana. It provides infrastructure, mentorship, funding, and networking opportunities to startups, fostering innovation, entrepreneurship, and job creation.
- 3. Mission Bhagiratha:** This initiative aims to provide safe drinking water to every household in Telangana. By ensuring access to clean water, the government aims to improve the health and well-being of the population, which in turn contributes to economic growth and productivity.



- 4. Telangana State Industrial Infrastructure Corporation (TSIIC):** TSIIC plays a crucial role in developing industrial infrastructure in the state. It develops industrial parks, special economic zones (SEZs), and industrial clusters, providing a conducive environment for industries to thrive and generate employment.

- 5. Telangana State Innovation Cell (TSIC):** TSIC promotes innovation and entrepreneurship by supporting research and development activities, fostering collaboration between academia and industry, and providing funding and mentorship to innovative startups and projects.

These policies and initiatives demonstrate the government's commitment to creating a favorable business environment, attracting investments, promoting innovation, and generating employment opportunities in Telangana.

## HYDERABAD



As the capital city, Hyderabad offers a robust business ecosystem, with a diverse range of industries and a skilled workforce. It has excellent connectivity, modern infrastructure, and a favorable investment climate, attracting both national and international businesses.



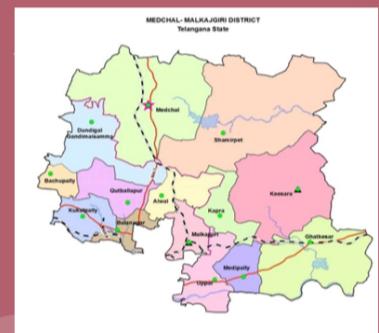
## RANGAREDDY

It is Located adjacent to Hyderabad, Rangareddy district benefits from its proximity to the capital city's economic opportunities. It offers a strategic location, well-developed industrial parks, and good transportation networks, making it an attractive choice for commercial investments.



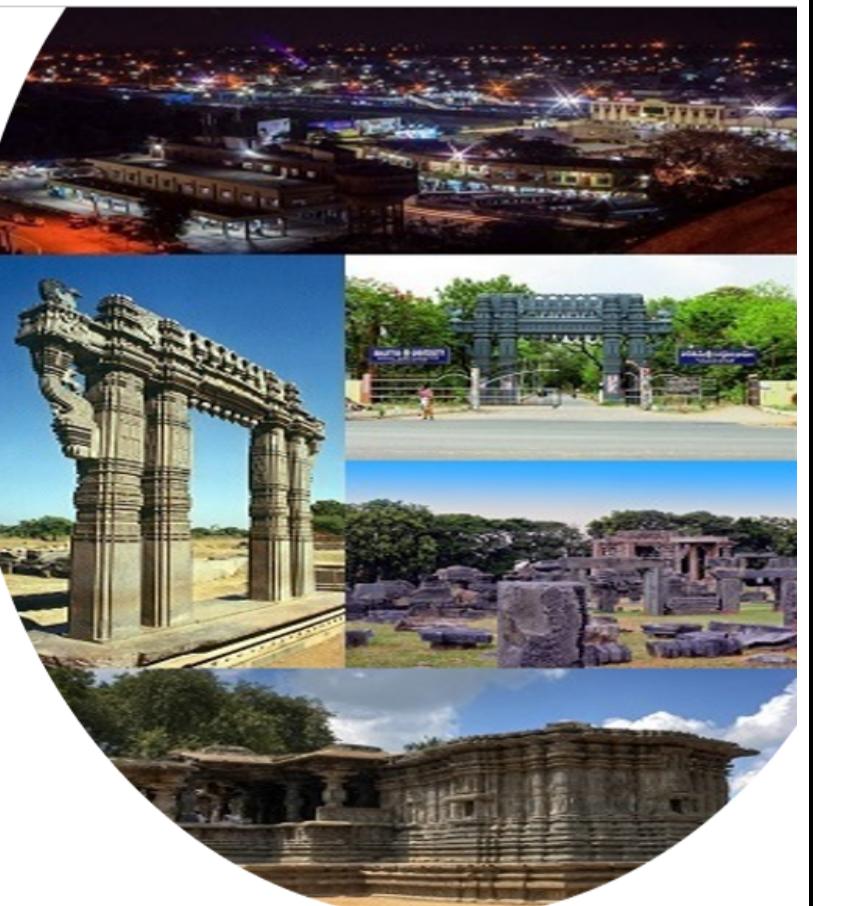
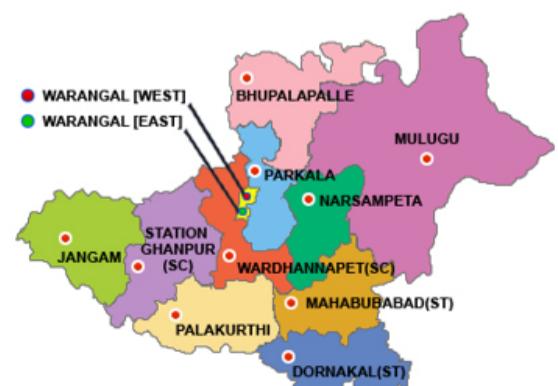
## MEDCHAL-MALKAJGIRI

This district has witnessed significant growth in recent years, with the development of industrial zones and infrastructure projects. It offers a favorable business environment, proximity to Hyderabad, and easy access to major transportation routes, making it an emerging commercial hotspot.



## WARANGAL URBAN

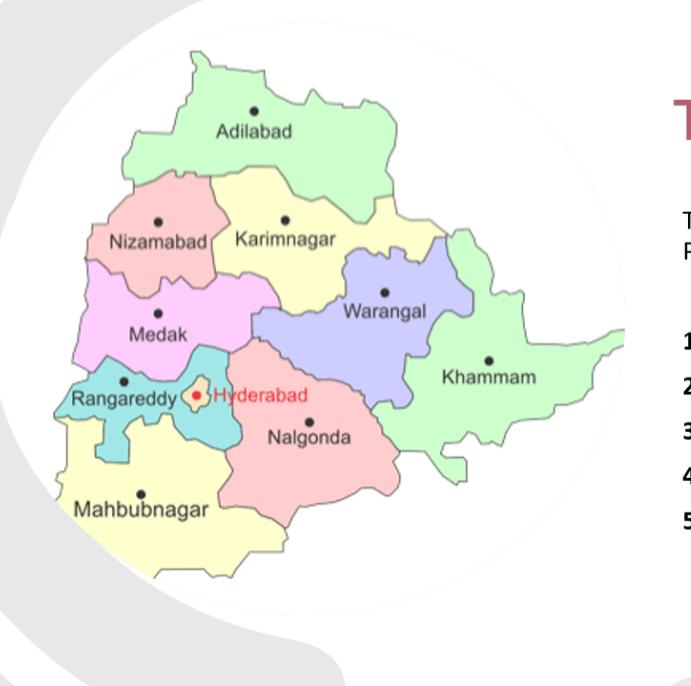
With a strong industrial base and a focus on technology and innovation, Warangal Urban district presents opportunities for commercial ventures. It has established industrial parks, educational institutions, and a supportive government, fostering a conducive environment for businesses.



## TOP 5 DISTRICTS

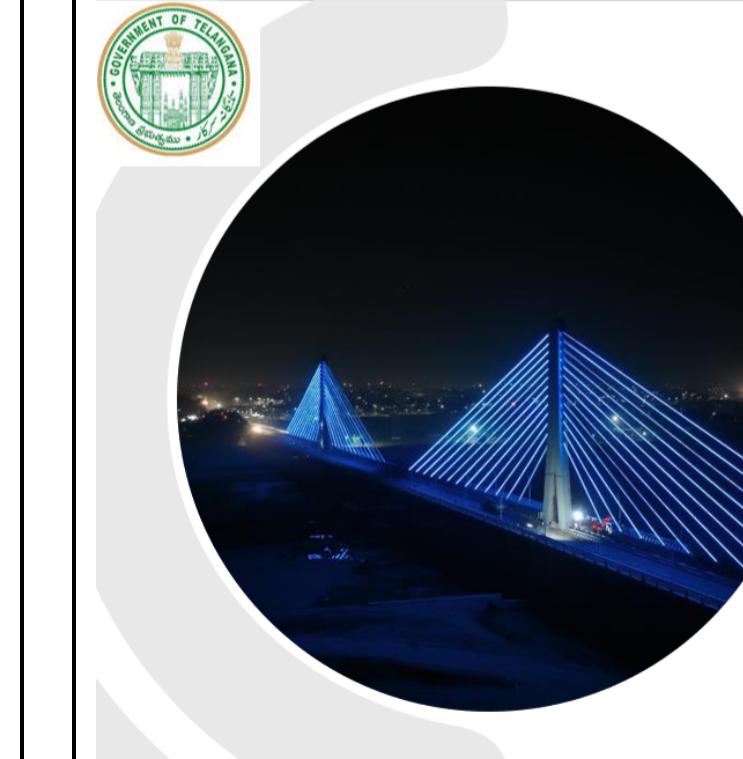
THE TOP 5 DISTRICTS TO BUY COMMERCIAL PROPERTIES IN TELANGANA ARE →

- 1) HYDERABAD
- 2) RANGAREDDY
- 3) MEDCHAL-MALKAJGIRI
- 4) WARANGAL URBAN
- 5) KARIMNAGAR

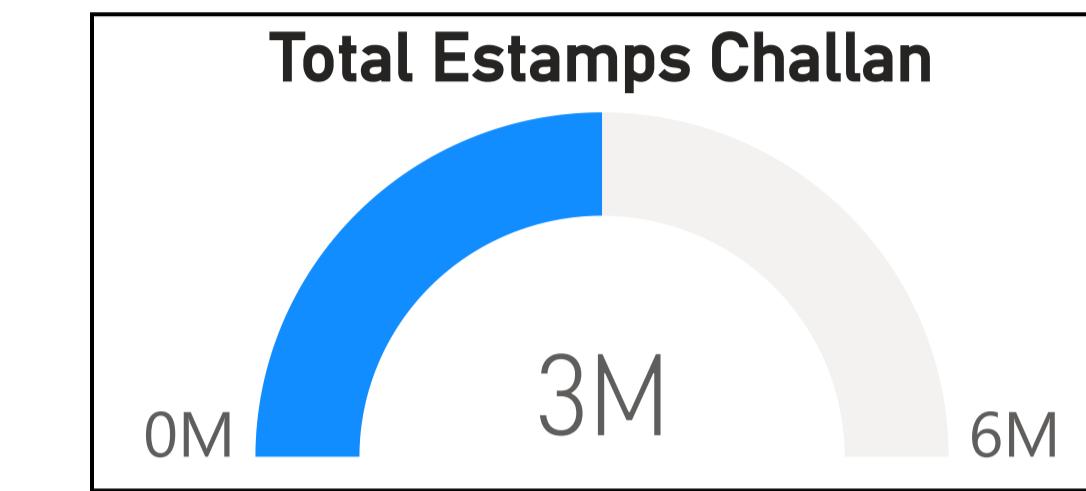
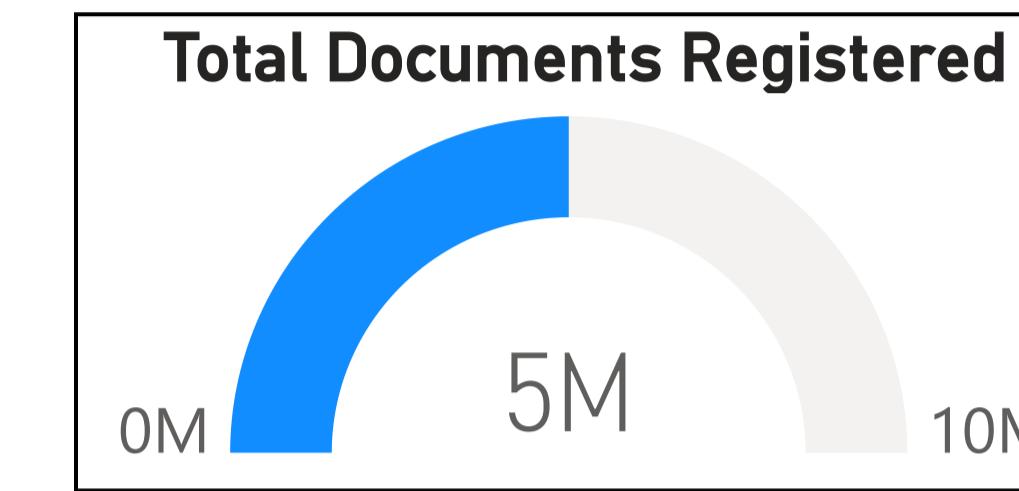
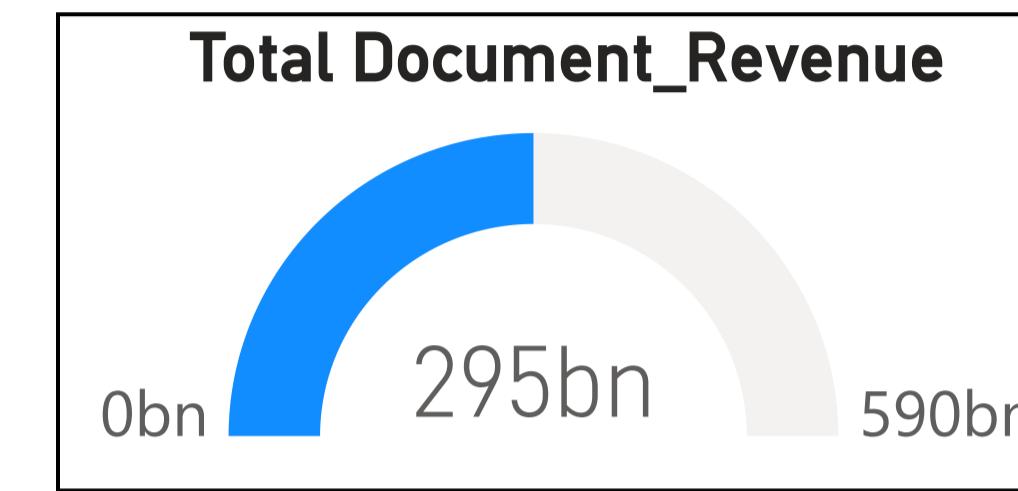
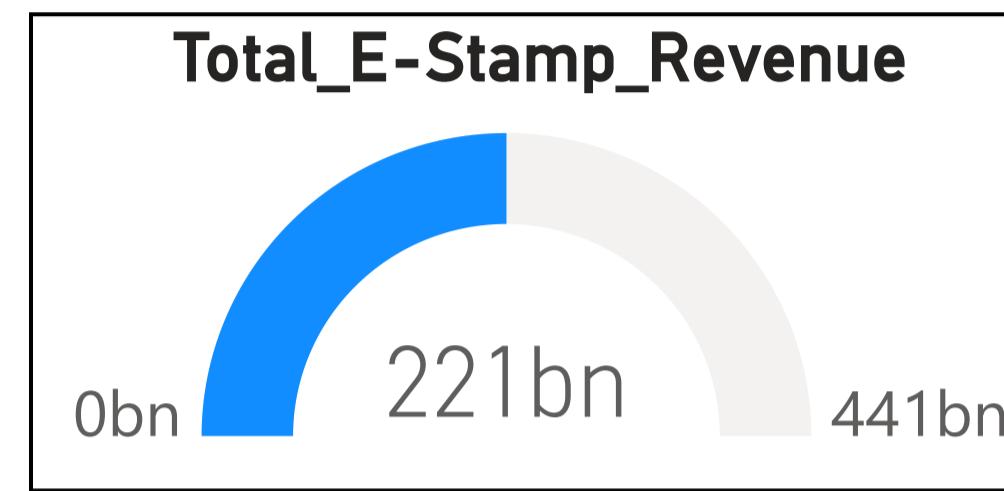


## KARIMNAGAR

Karimnagar district has a thriving agricultural and industrial sector, contributing to its economic growth. It offers a strategic location, good connectivity, and a growing consumer market, making it an attractive destination for commercial investments.

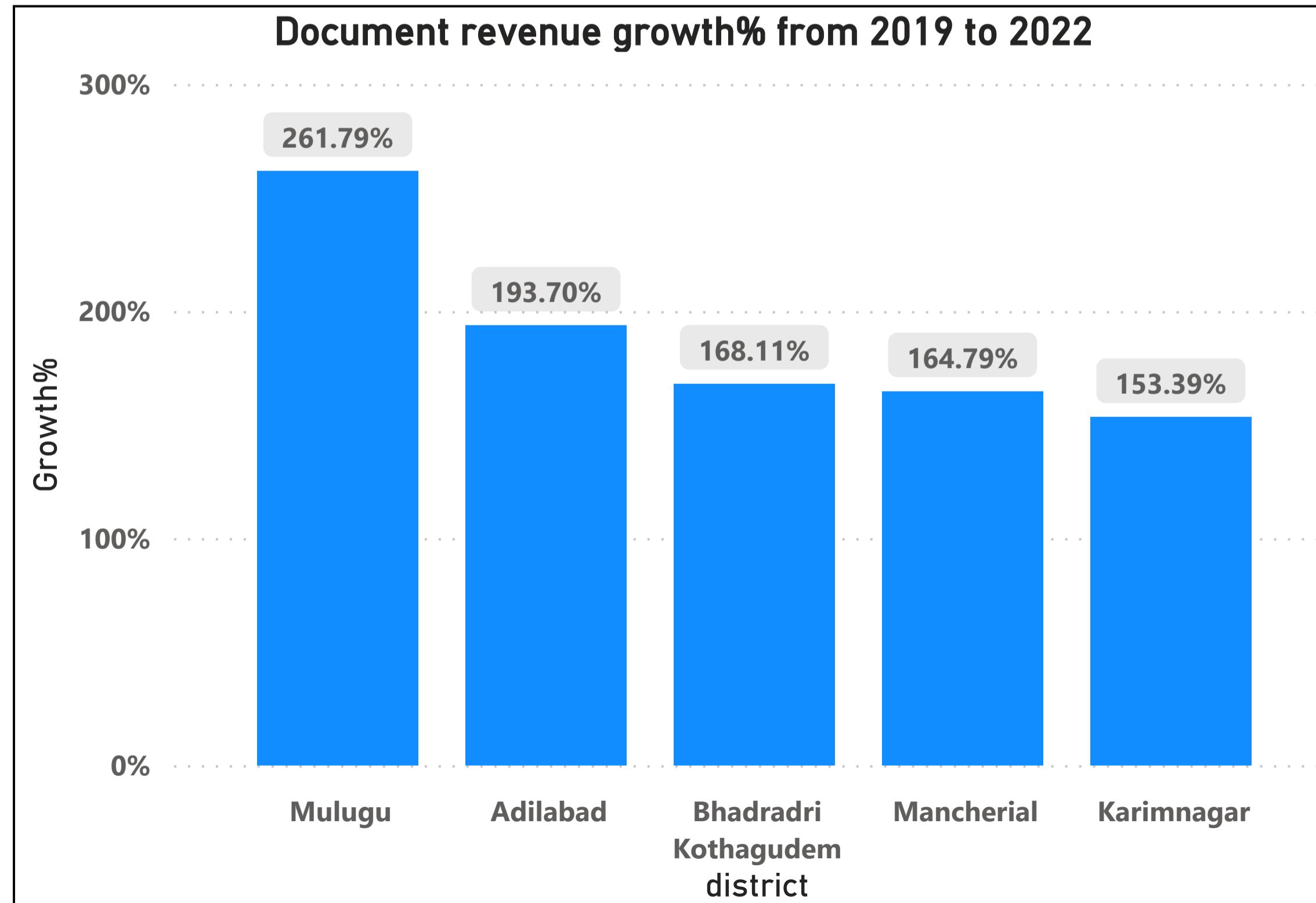


**How does the revenue generated from document registration vary across districts in Telangana? List down the top 5 districts that showed the highest document registration revenue growth between FY 2019 and 2022.**

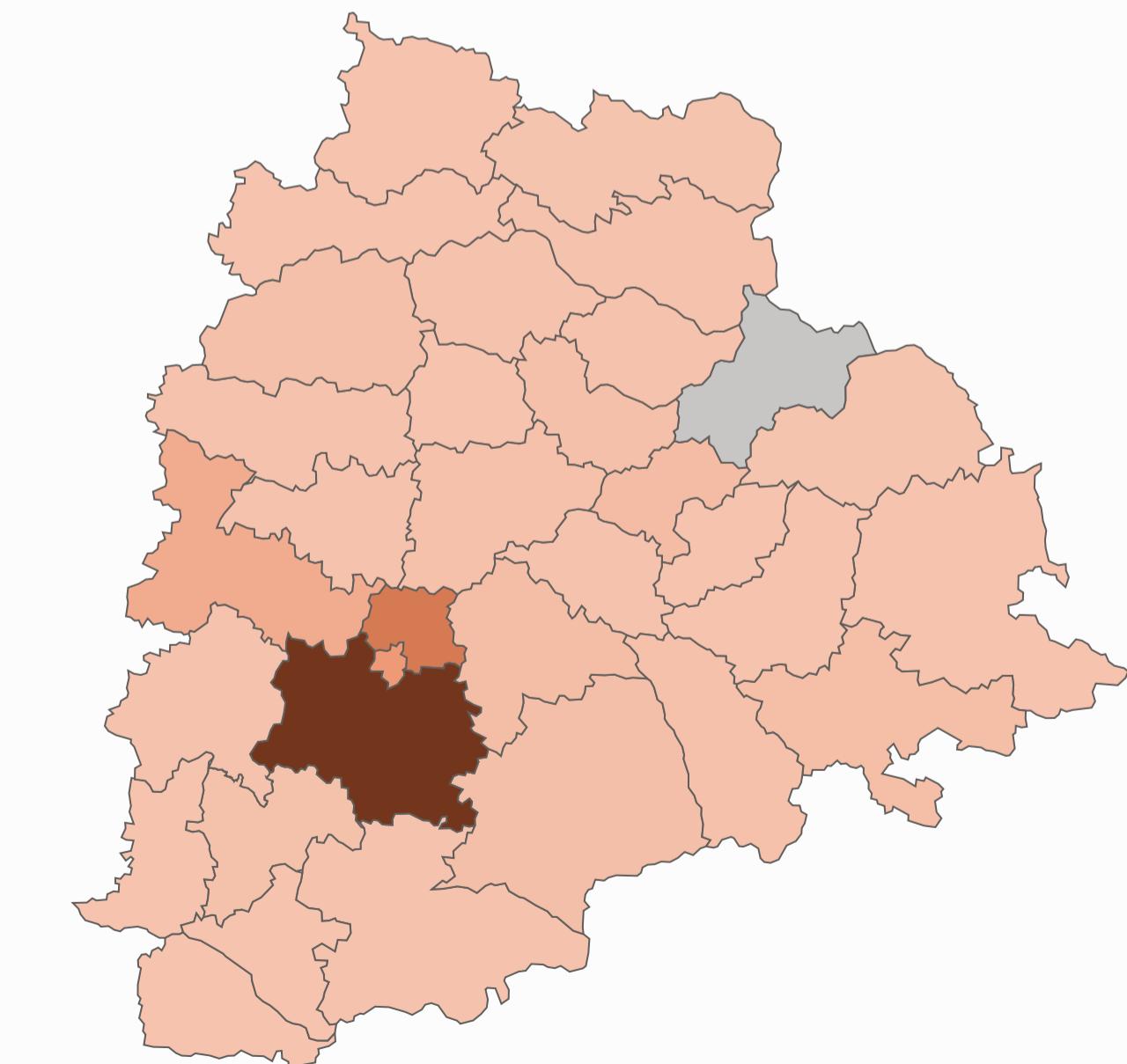


The districts of Mulugu, Adilabad, Bhadrak, Mancherial and Karimnagar were the districts that showed the maximum growth in revenue from document registration between 2019 and 2022.

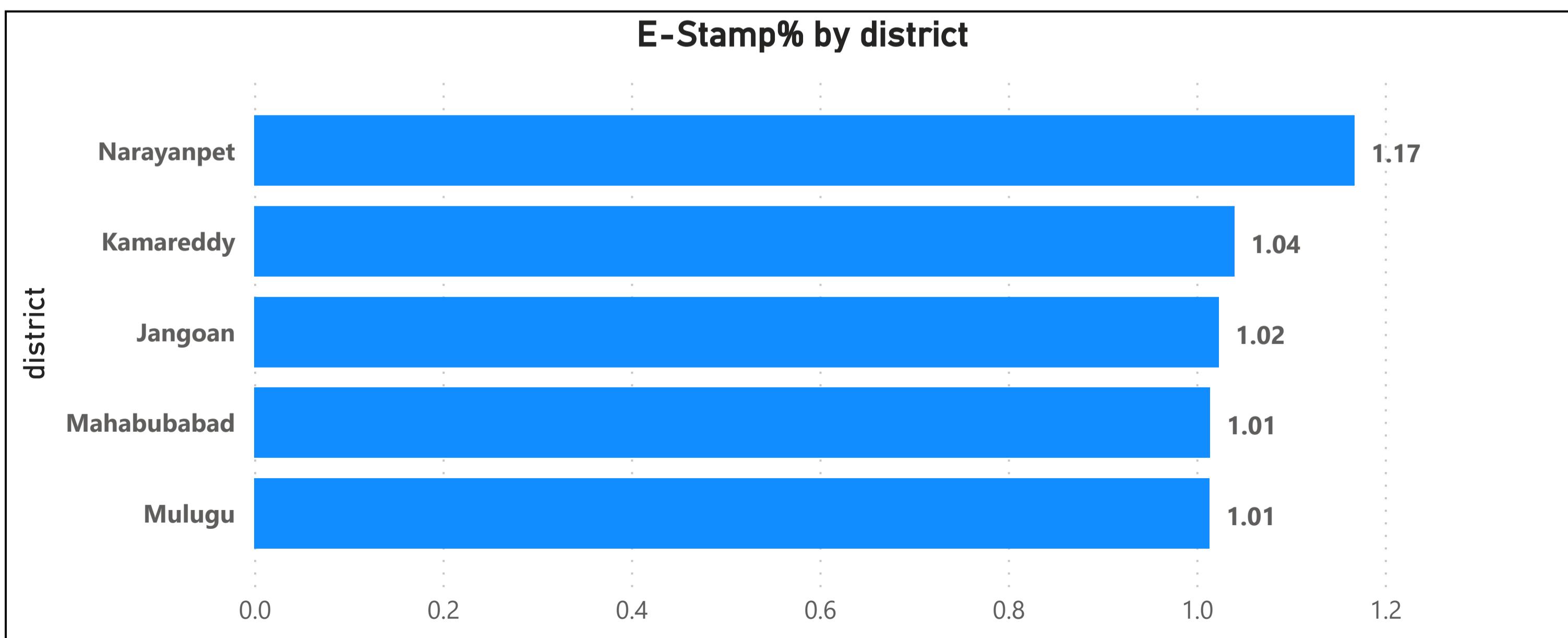
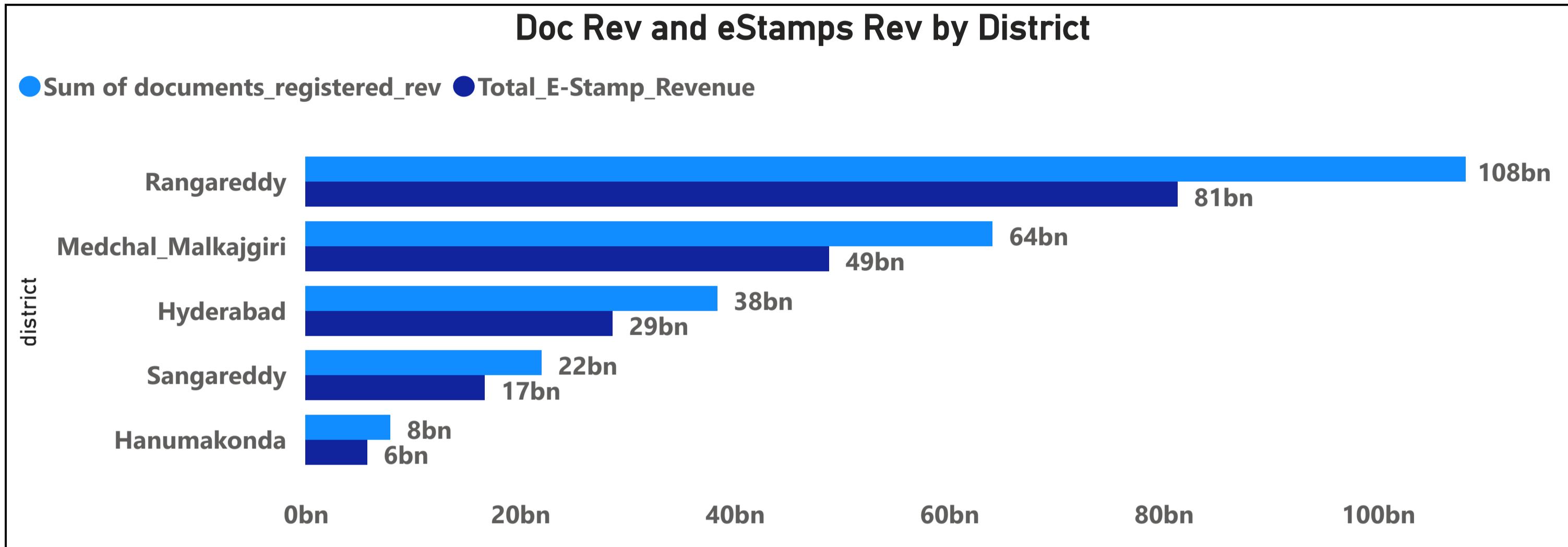
It can be seen that the western states of Telangana had more revenue in comparison to other parts.



**Telangana's District-wise Document Revenue (2019-2022)**



# How does the revenue generated from document registration compare to the revenue generated from e-stamp challans across districts? List down the top 5 districts where e-stamps revenue contributes significantly more to



- Although the revenue from traditional documents has historically been slightly higher across districts due to its longstanding presence, the introduction of e-Stamps in Dec 2020 has led to significant growth, and it is anticipated that in the upcoming years, e-Stamps revenue may surpass that of traditional documents.
- Narayanpet district exhibited the most substantial revenue contrast between e-Stamps and traditional documents, with Kamareddy and Jangoan districts following behind in terms of the revenue difference.

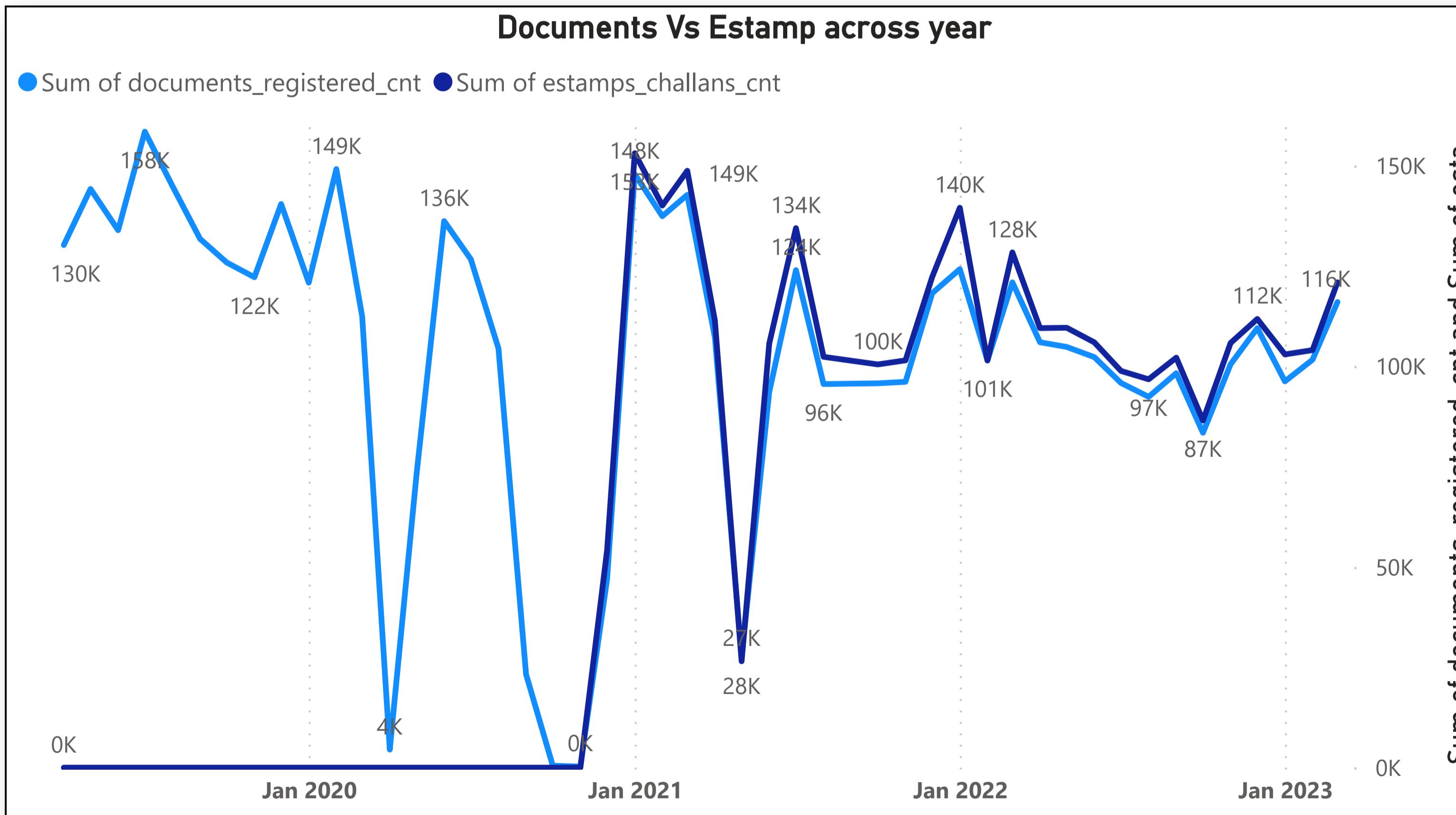
# Is there any alteration of e-Stamp challan count and document registration count pattern since the implementation of e-Stamp challan? If so, what suggestions would you propose to the government?

Total e-Stamps registration count  
**3M**

e-Stamps revenue  
**221bn**

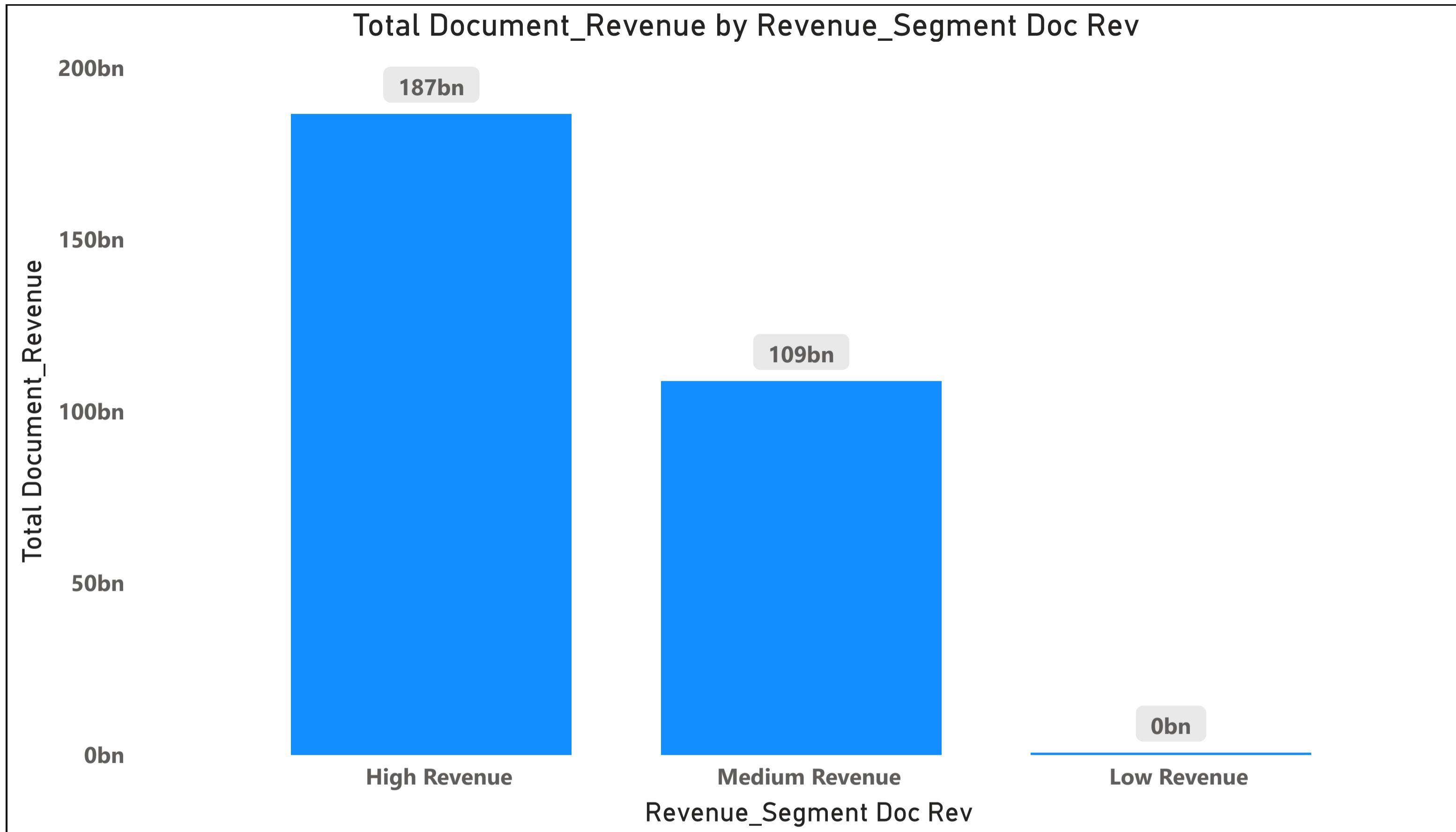
district  
All

month  
All



- Since the introduction of e-Stamps in December 2020, there has been a significant increase. It is anticipated that the e-Stamp count will grow substantially.
- Government should consider focusing on strategies to further promote the e-Stamps by creating awareness campaigns, streamlining and simplifying the e-Stamp process, and introducing online payments.

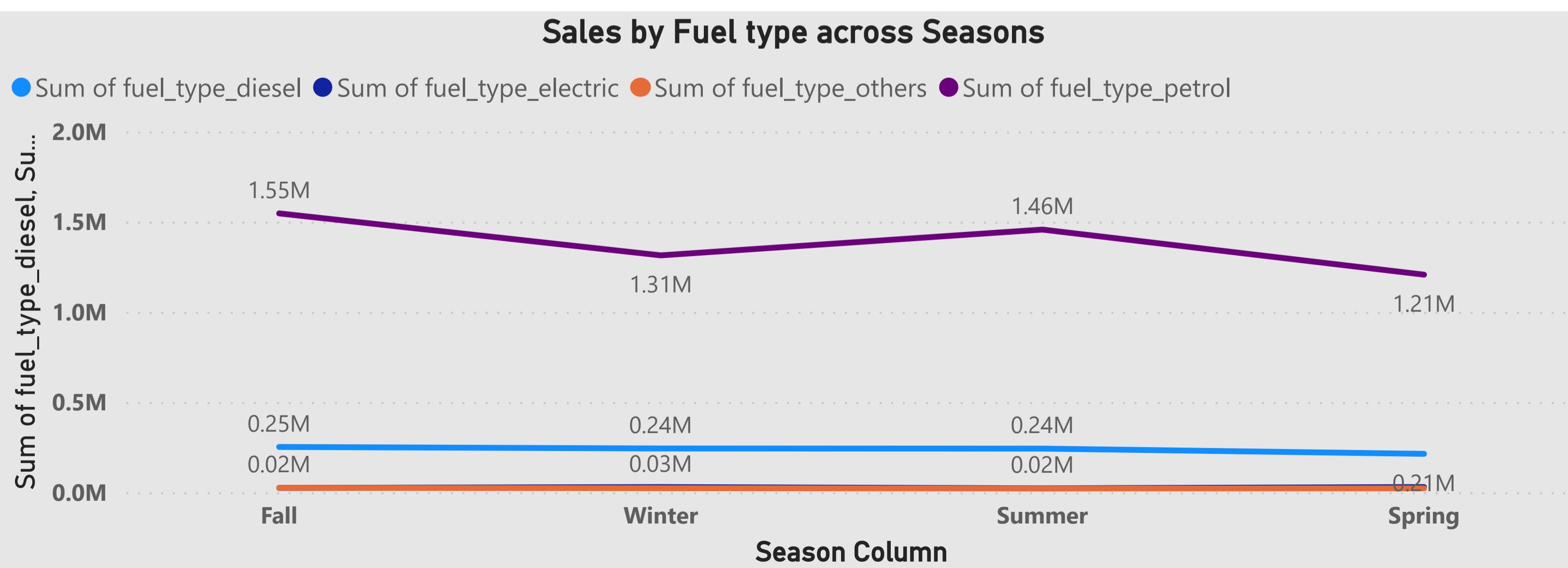
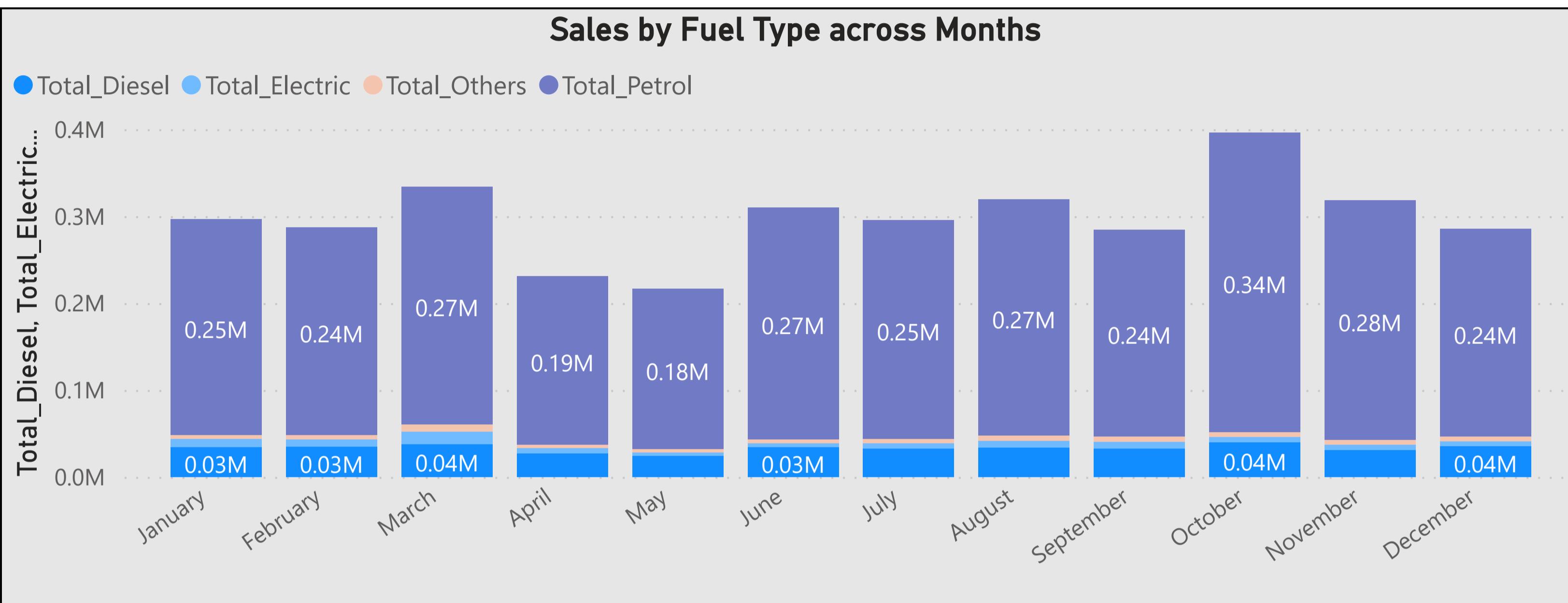
## Categorize districts into three segments based on their stamp registration revenue generation during the fiscal year 2021 to 2022.



- The three districts Malkajgiri, Hyderabad, and Sangareddy – surpassed a revenue of 10 Billion, while the majority of districts fell within the range of 1 to 10 Billion.
- Districts like Mulugu, Warangal, and Narayapet reported the lowest revenue figures.

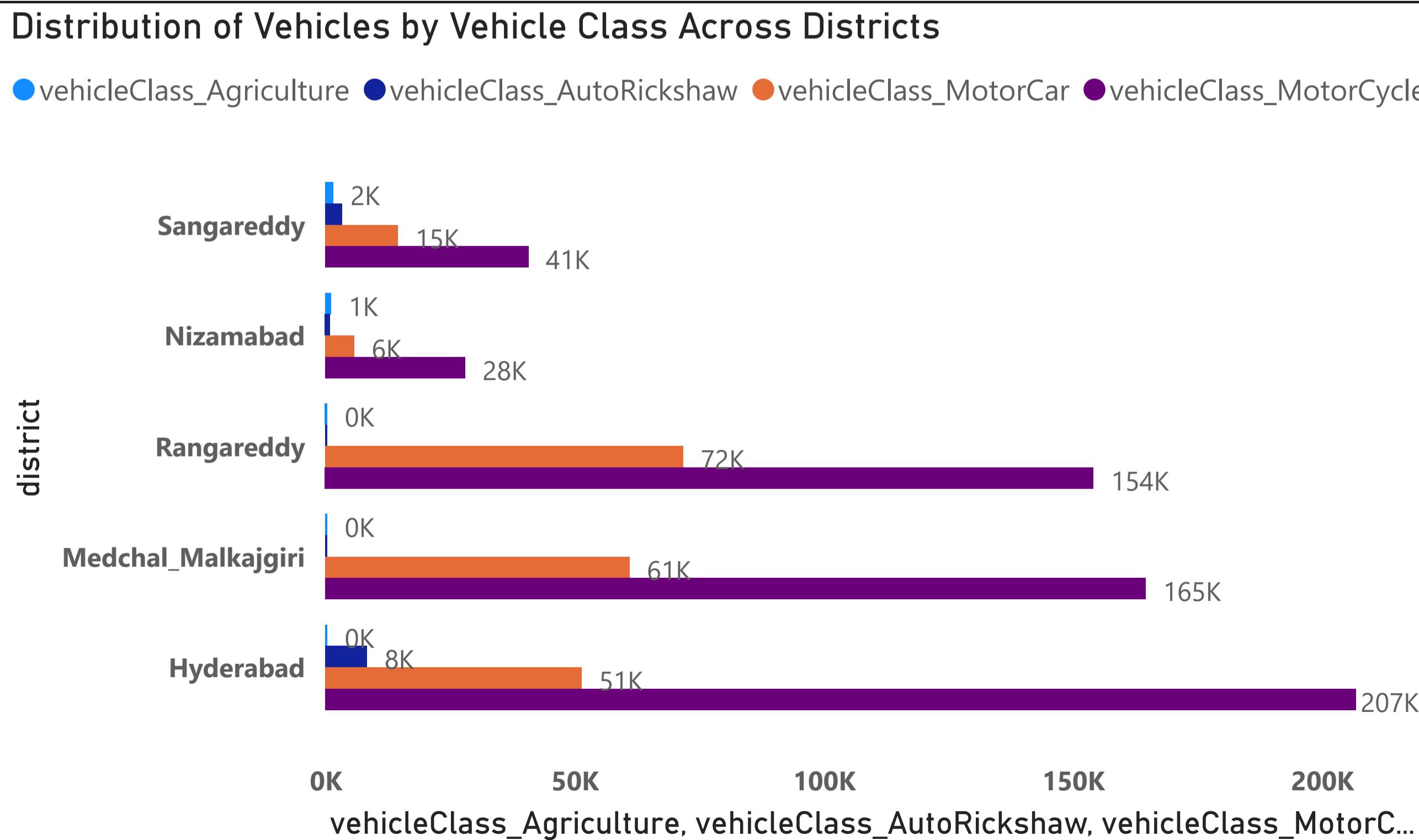
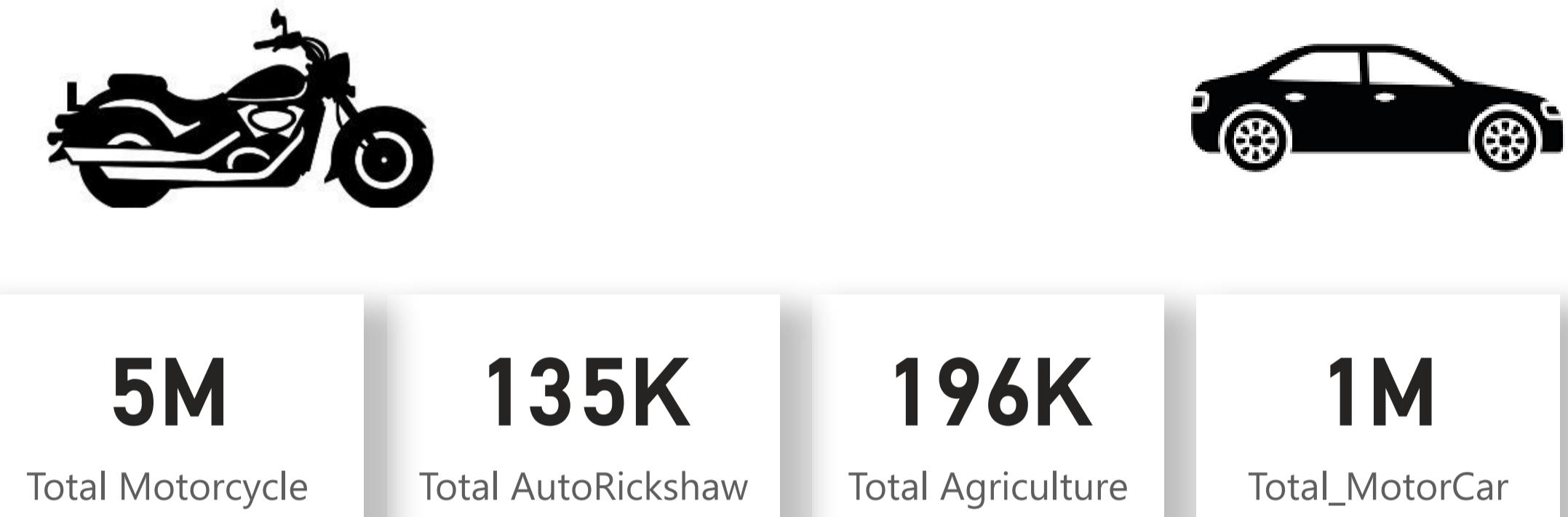
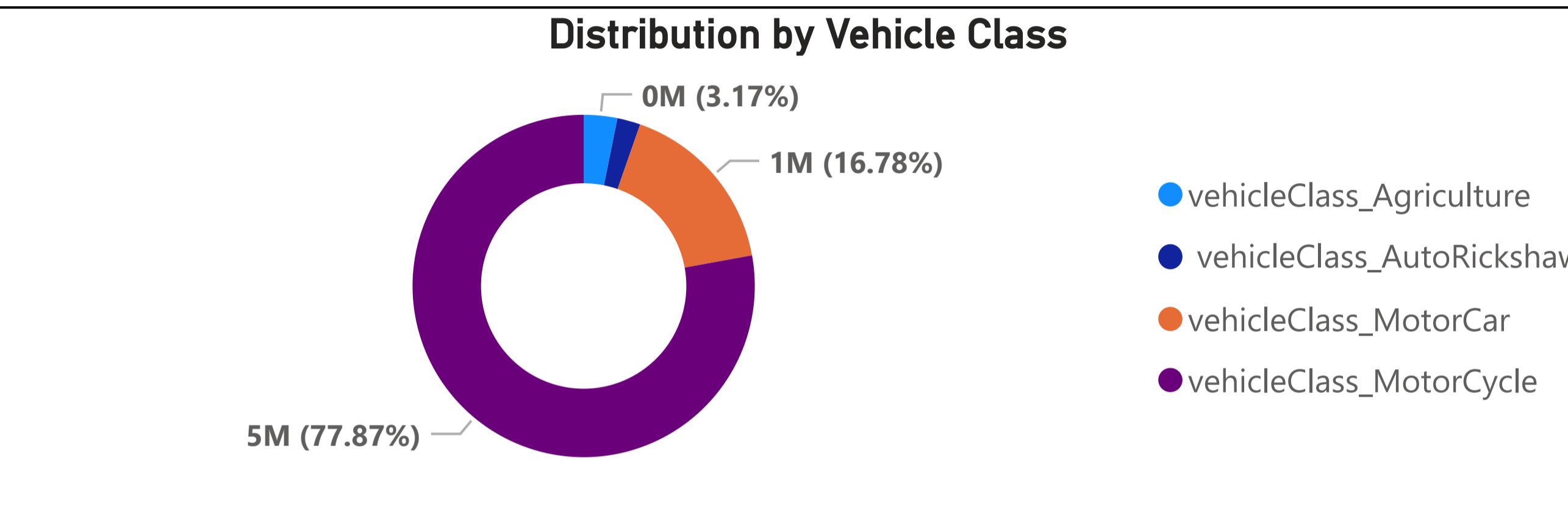
Revenue_Segment Doc Rev	Total Document_Revenue
<b>High Revenue</b>	<b>187bn</b>
Rangareddy	107bn
Medchal_Malkajgiri	57bn
Hyderabad	23bn
<b>Medium Revenue</b>	<b>109bn</b>
Sangareddy	22bn
Hyderabad	16bn
Hanumakonda	8bn
Medchal_Malkajgiri	7bn
Yadadri Bhuvanagiri	6bn
Khammam	6bn
Nalgonda	5bn
Nizamabad	4bn
Karimnagar	4bn
Mahabubnagar	3bn
Suryapet	3bn
Siddipet	3bn
Medak	2bn
Peddapalli	2bn
Mancherial	2bn
Jagtial	2bn
Rangareddy	2bn
Kamareddy	1bn
Vikarabad	1bn
Nagarkurnool	1bn
Jangoan	1bn
Rajanna Sircilla	1bn
Wanaparthy	1bn
Adilabad	1bn
<b>Total</b>	<b>295bn</b>

Investigate whether there is any correlation between vehicle sales and specific months or seasons in different districts. Are there any months or seasons that consistently show higher or lower sales rate, and if yes, what could be the driving factors? (Consider Fuel-Type category only)



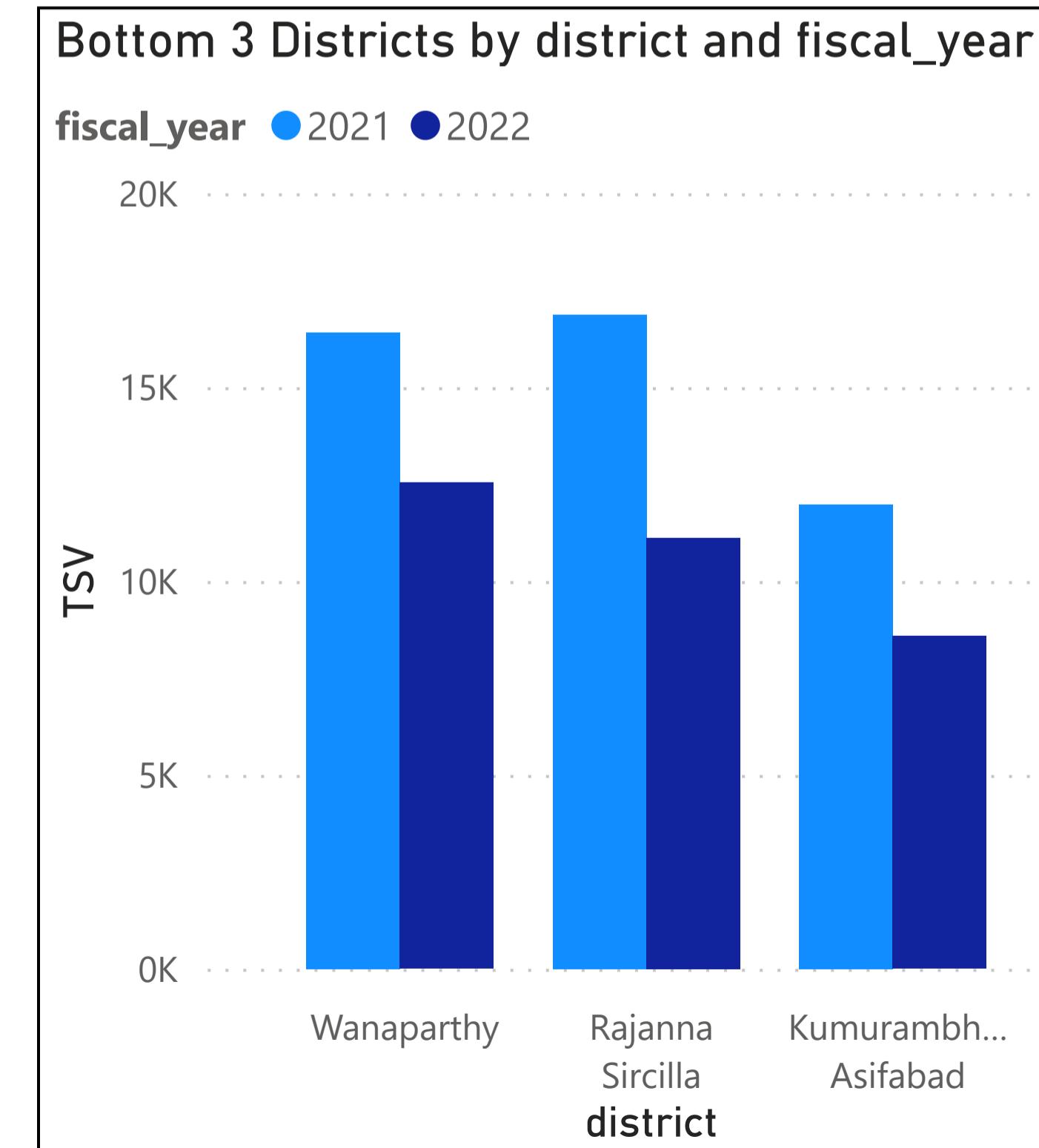
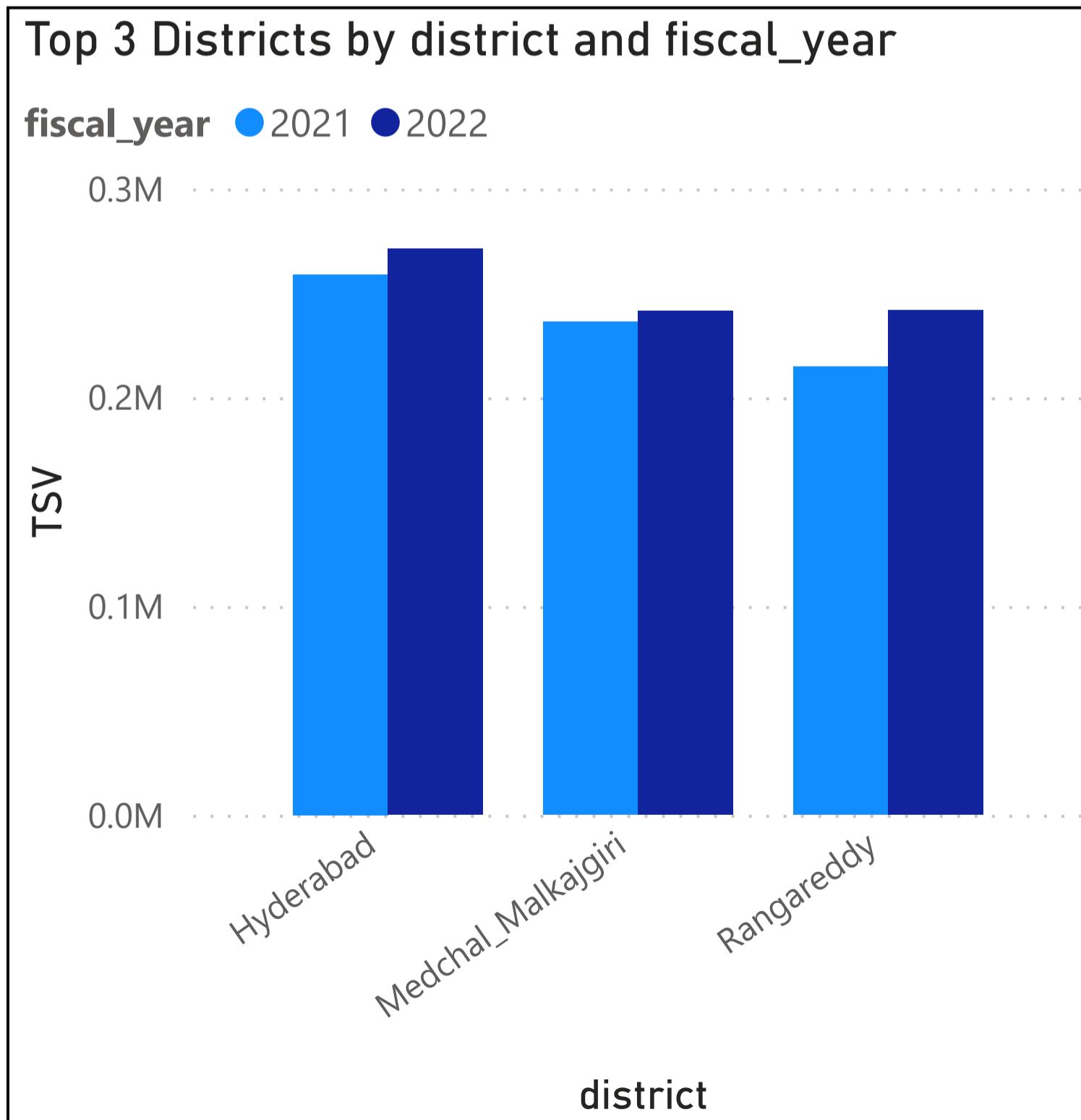
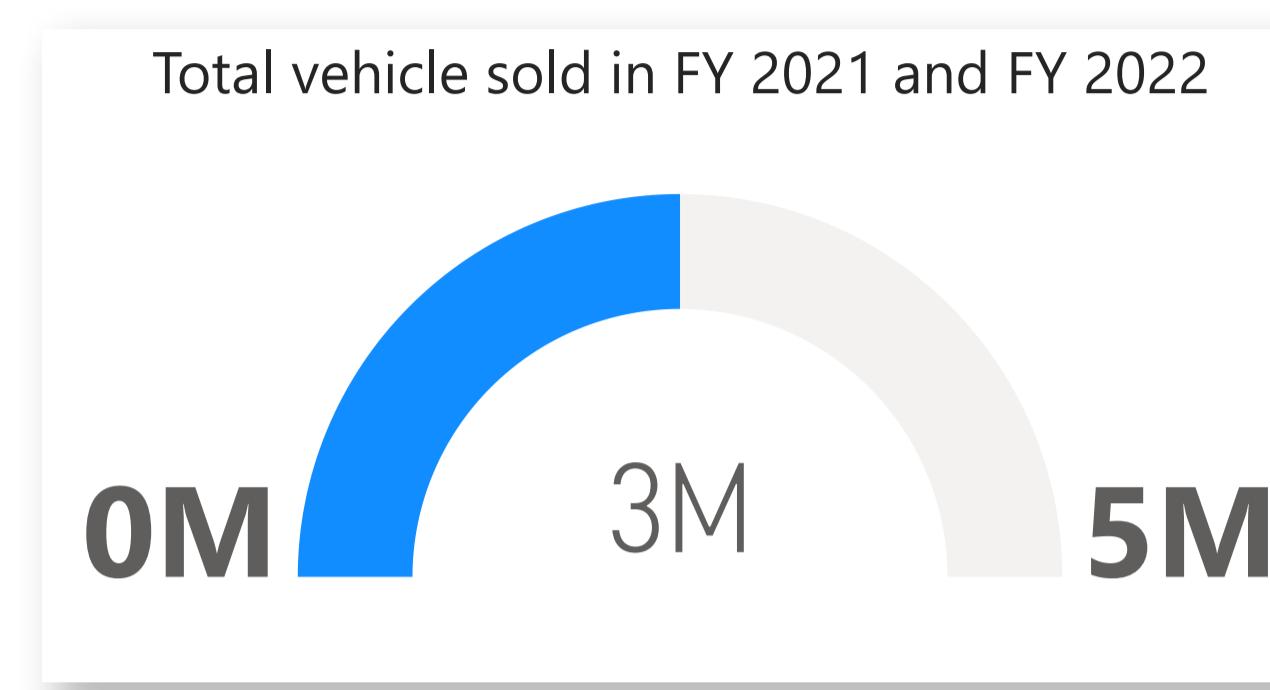
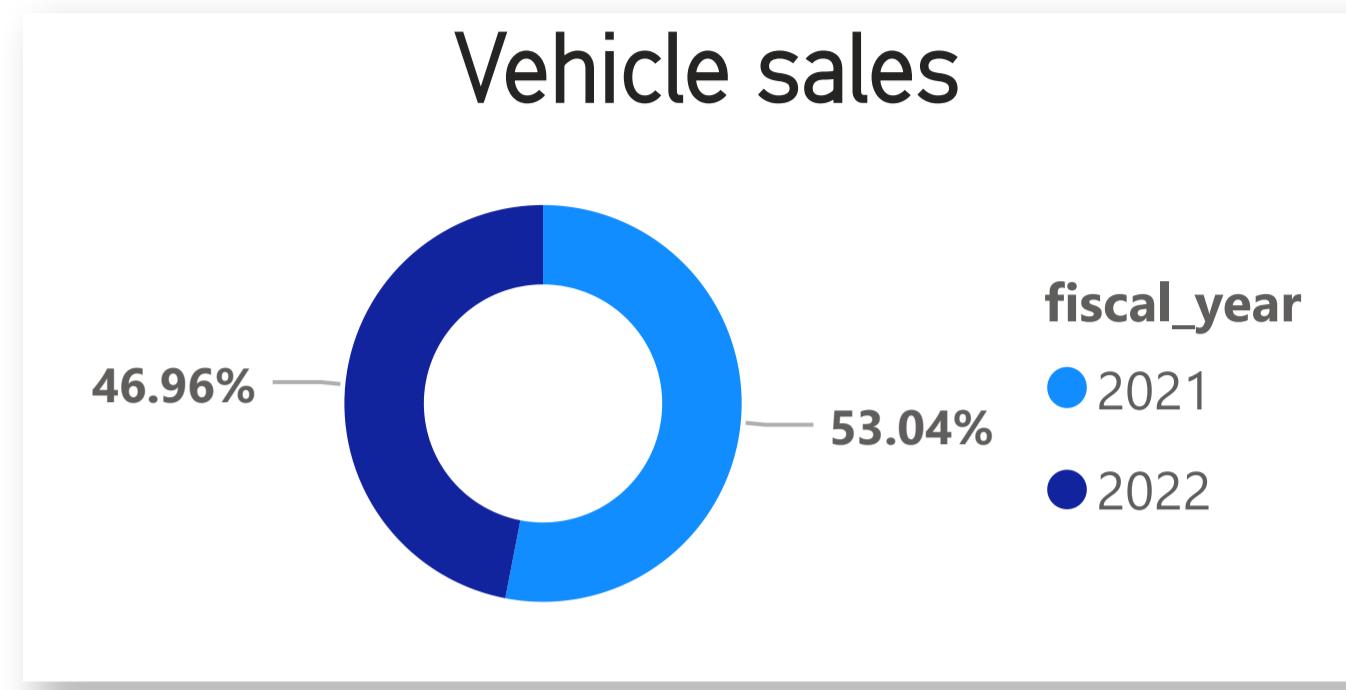
- It can be observed that the highest sales occur in the month of October, while April and May consistently exhibit the lowest sales figures throughout all the years.
- The heightened sales in October may be attributed to the festive season, like Dusshera, diwali during which numerous vehicle sales promotions and offers are typically launched, stimulating consumer demand.
- However, the lower sales in April and May could be linked to the commencement of the financial year, potentially affecting consumer purchasing patterns.

How does the distribution of vehicles vary by vehicle class (MotorCycle, MotorCar, AutoRickshaw, Agriculture) across different districts? Are there any districts with a predominant preference for a specific vehicle class? Consider FY 2022 for analysis.



- MotorCars are notably higher in the districts of Rangareddy, Malkajgiri, and Hyderabad compared to other districts.
- AutoRickshaws are more prevalent in the district of Hyderabad. However, the standout preference across various districts appears to be for Motorcycles, which seem to be the preferred vehicle class among the majority of people.
- On the contrary, the Agricultural vehicle class is considerably low in terms of numbers across the districts, and in specific districts like Rangareddy, Malkajgiri and Hyderabad, the presence of Agricultural

List down the top 3 and bottom 3 districts that have shown the highest and lowest vehicle sales growth during FY 2022 compared to FY



## List down the top 5 sectors that have witnessed the most significant investments in FY 2022.

Top 5 Sectors with Most Investments in FY 2022

fiscal\_year ● 2022

Plastic and Rubber

5.9K

Pharmaceuticals and Chemicals

2.2K

Real Estate, Industrial Parks and I...

2.1K

Solar and Other Renewable Ener...

2.1K

Engineering

1.9K

0K

1K

2K

3K

4K

5K

6K

Sum of investment in cr

Sum of investment in cr

0.00K

99.13K

198.27K

In 2022, the Real Estate, Industrial Parks, and IT Buildings sector secured the most significant investments, followed by the Plastic & Rubber Sector and the Pharma & Chemicals Sector.

The Solar and Renewable sector, along with the Beverages sector, also attracted noteworthy investments during the year.

**List down the top 3 districts that have attracted the most significant sector investments during FY 2019 to 2022? What factors could have led to the substantial investments in these particular districts?**

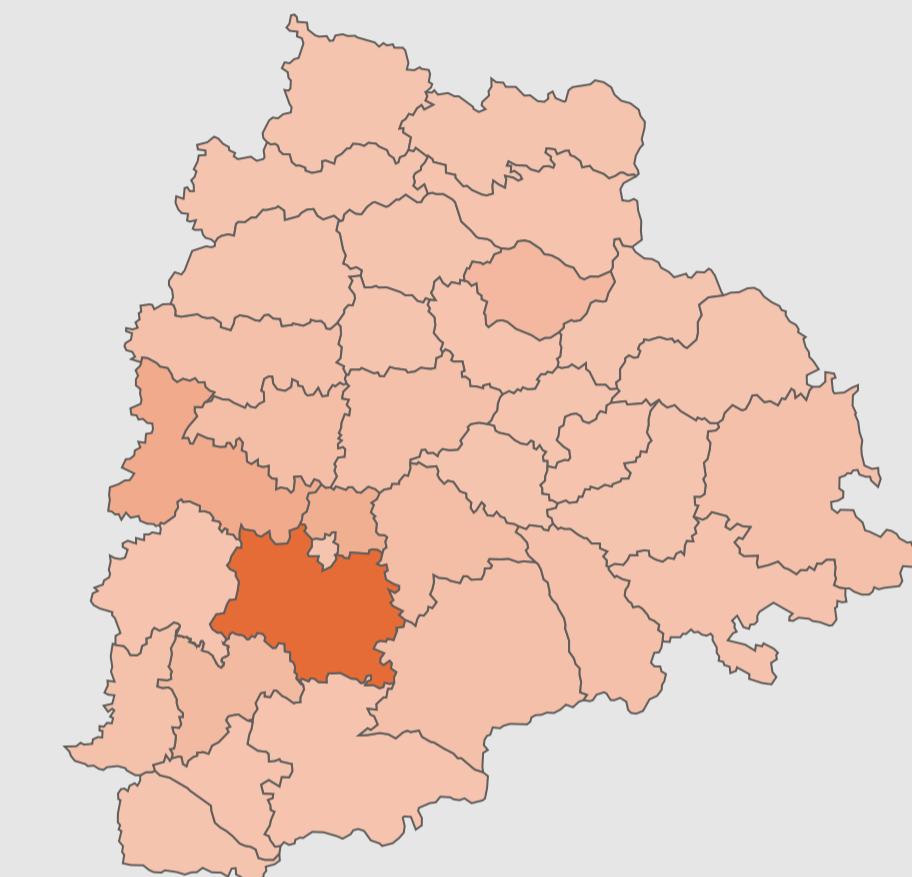
**Several Factors that led to the substantial investments during FY 2019 to 2022 are Rangareddy, Sangareddy and Medchal Malkajgiri**

**Infrastructure , Proximity & Connectivity :** These districts' close proximity to Hyderabad, a major hub for various industries, offers businesses access to resources and infrastructure. Efficient connectivity through transportation networks like railways, highways, and ports, as well as access to logistics facilities, can make it easier for businesses to transport goods and raw materials. Well-developed road connectivity, industrial parks and educational institutions in these districts make them attractive for investment.

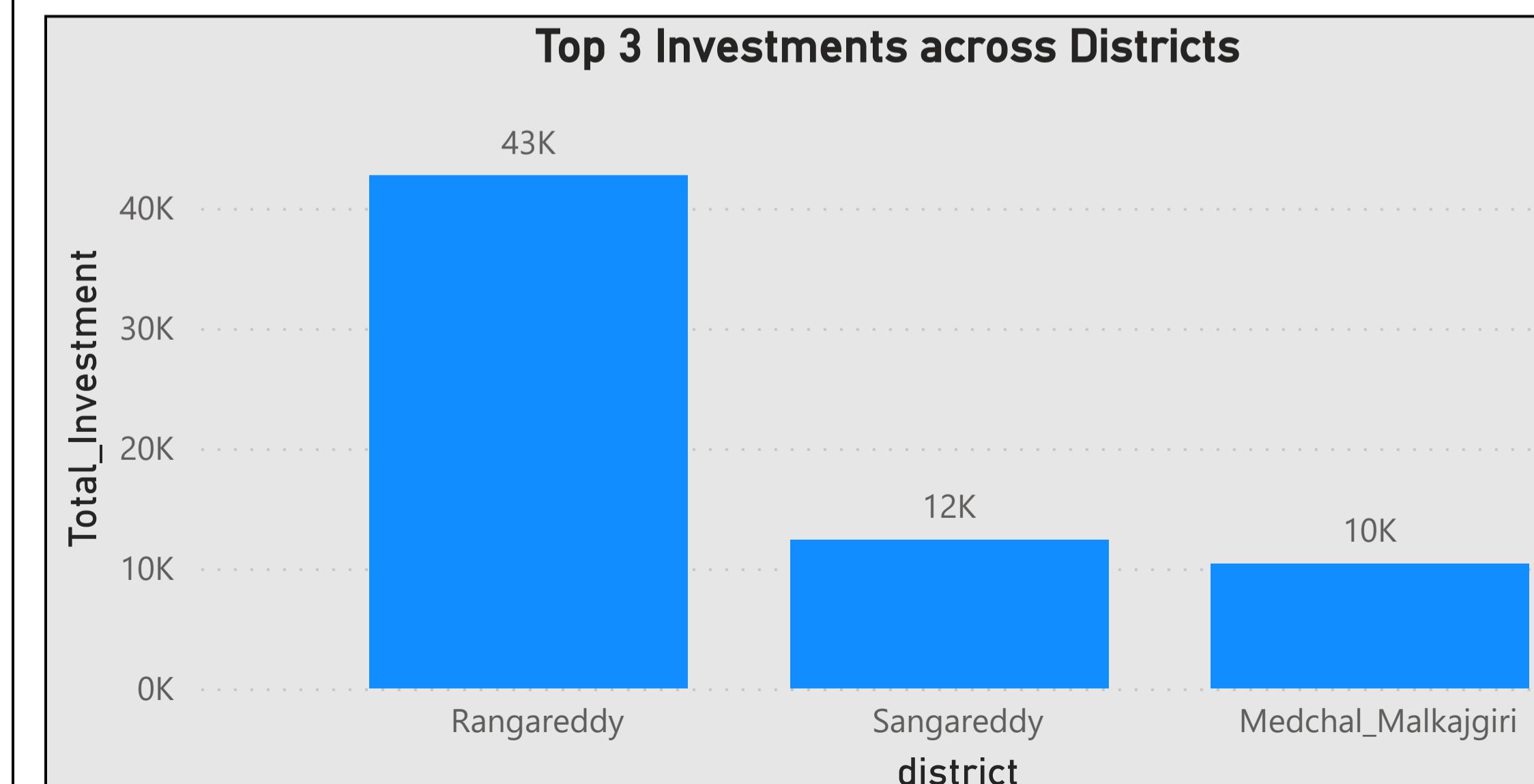
**Government Policies:** Investor-friendly policies in Telangana, including tax incentives, subsidies, and regulatory support for industries and single-window clearance, simplify the investment process. Telangana, for instance, has been known for its proactive stance in attracting investments through initiatives like the Telangana State Industrial Project Approval and Self Certification System (TS-iPASS).

**Special Economic Zones (SEZs):** Hosting SEZs that provide tax benefits and incentives for companies encourages investment

**Total Documents Registered Revenue by district**



**Top 3 Investments across Districts**



## Is there any relationship between district investments, vehicles sales and stamps revenue within the same district between FY 2021 & 2022?

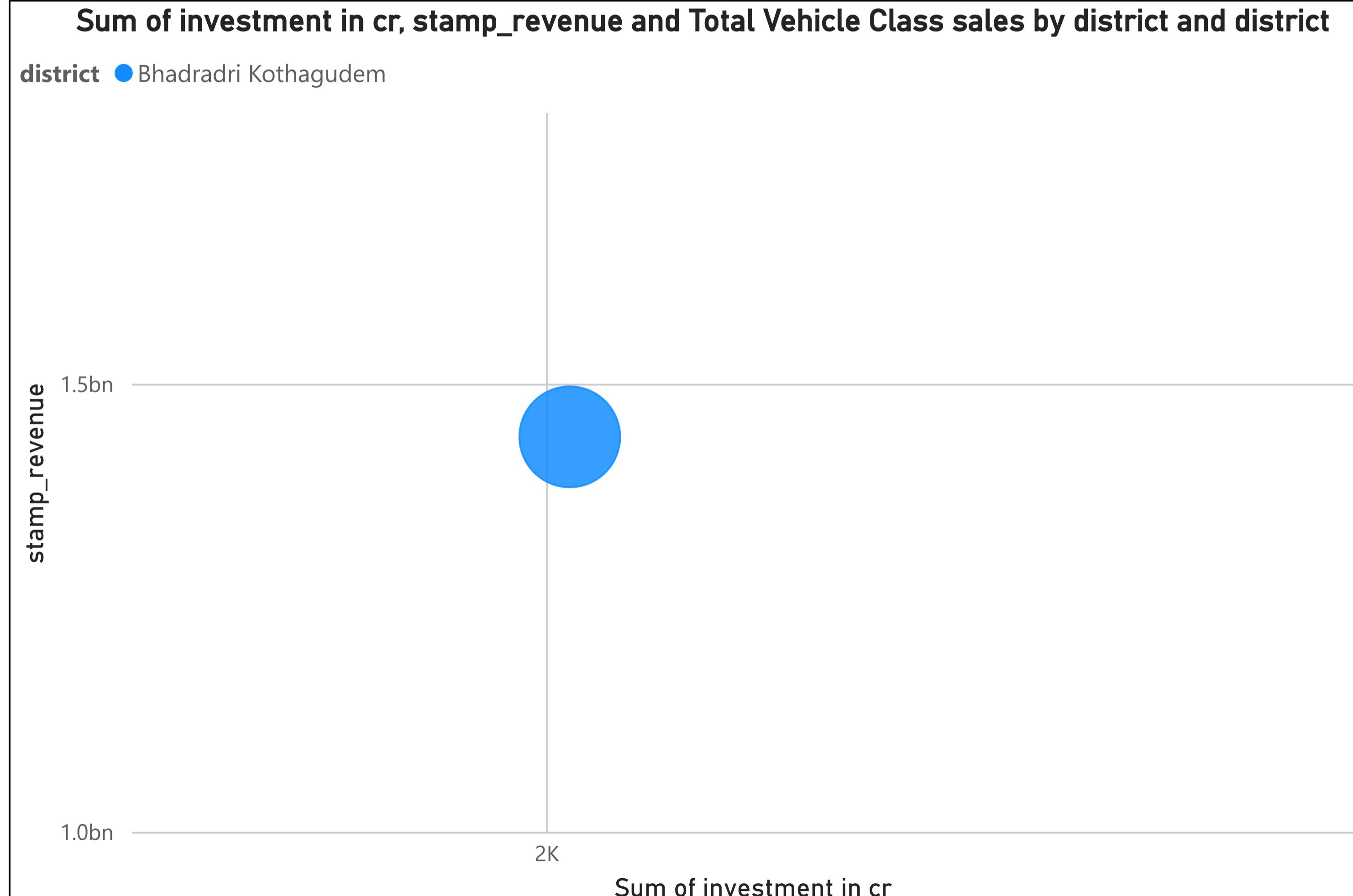
district  
Bhadradri Kothagu... ▾

Data shows that there is a relationship between investments, vehicle sales, and stamps revenue within the same district.

Districts with higher stamps and vehicle sales revenue show significant investments. However, there are also exceptions noted for cities like Hyderabad & Rangareddy

Despite having higher stamps and vehicle sales revenue, Hyderabad received comparatively low investments. and Rangareddy, with substantial vehicle sales revenue and limited stamps revenue, managed to secure the highest investments. Medchal-Malkajgiri district occupies the second position in investment.

There is a correlation between revenue streams and investments within districts, other factors do influence the investment patterns in certain regions, leading to exceptions like those seen in Hyderabad and Rangareddy.



## Are there any particular sectors that have shown substantial investment in multiple districts between FY 2021 and 2022?

Total investment in crore

Sum of investment in cr

**99.13K**

- Between 2021 and 2022, certain sectors have exhibited substantial investments across multiple districts.
- Food Processing, Agro based Cold Storages, and Engineering sectors have increased their presence in more than 30 districts whereas Real Estate, Industrial Parks, and IT Buildings sector have high investments primarily in 4 districts.
- Textiles, wood and leather etc do not show significant investments.

Year

All

sector

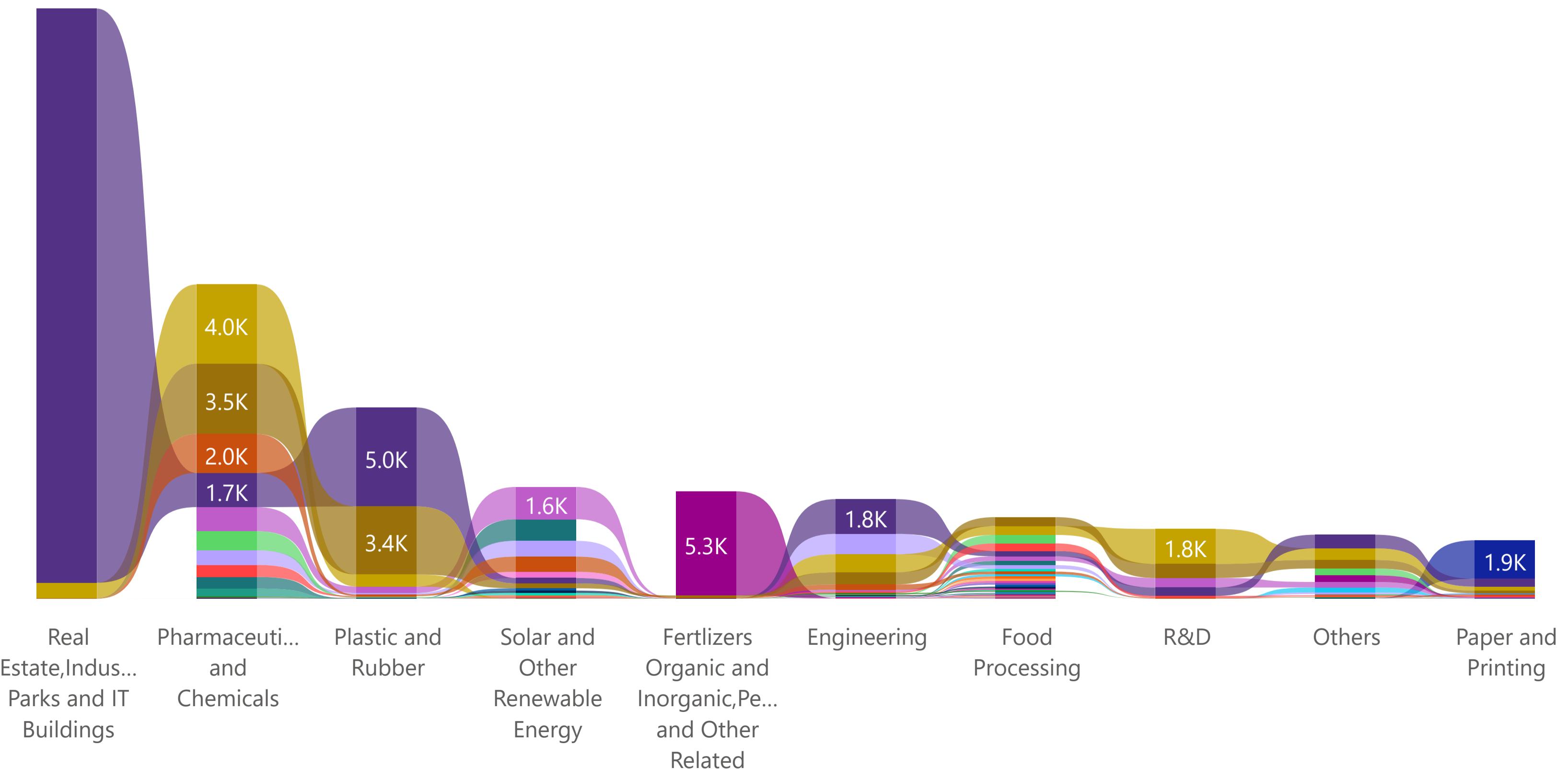
All

district

All

Sum of investment in cr and Count of fiscal\_year by sector and district

district ● Adilabad ● Bhadrav... ● Hanuma... ● Hyderab... ● Jagtial ● Jangoan ● Jayasha... ● Jogulam... ● Kamare... ● Karimna... ● Khamm... ●



**Can we identify any seasonal patterns or cyclicity in the investment trends for specific sectors? Do certain sectors experience higher investments during particular months?**

The Real Estate & Industry Parks sector shows significant investments, specially in the month of February.

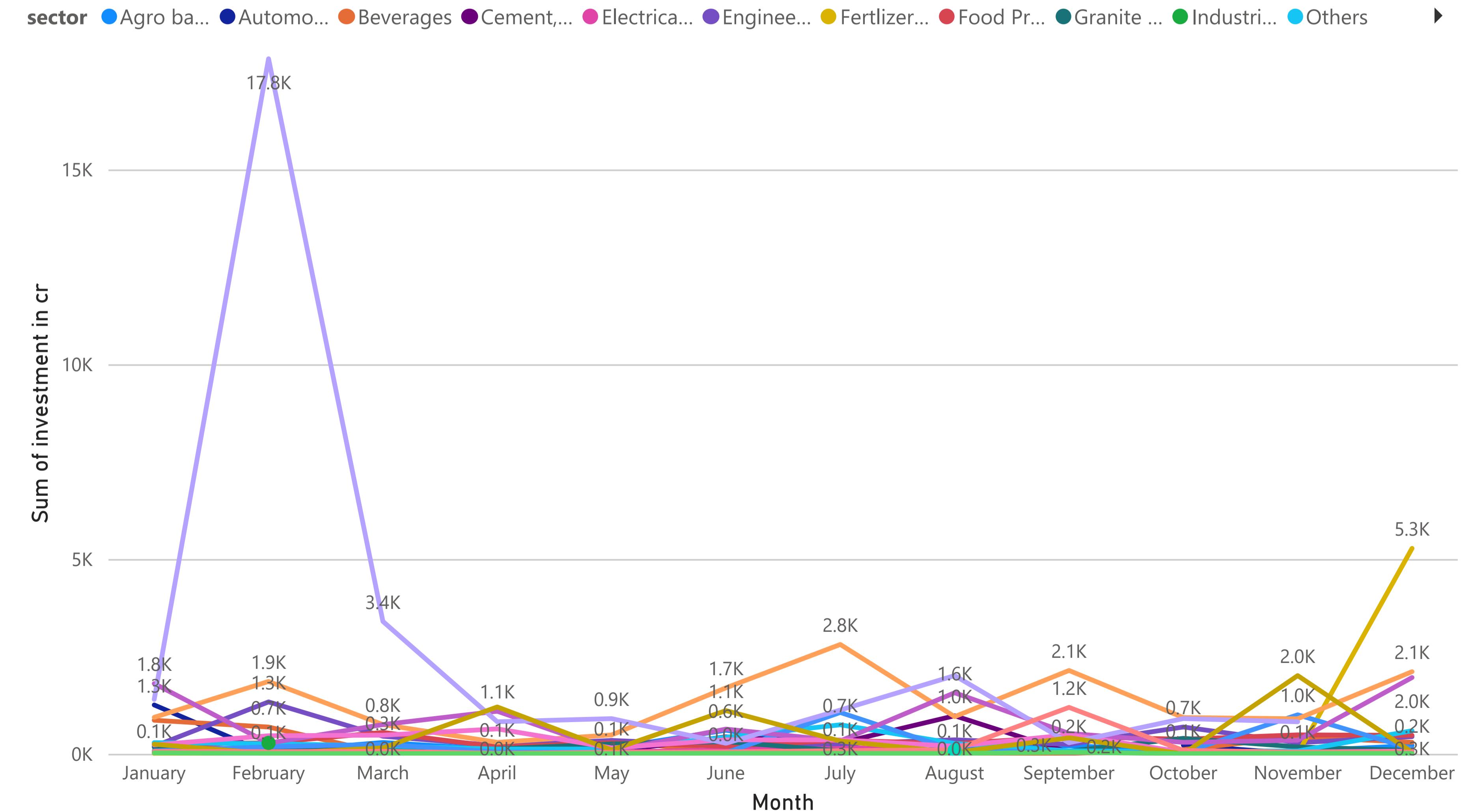
High Investment seen in The Pharma and Chemicals sector during June and July, showing a consistent presence throughout the year.

Huge dip In investment for the fertilizers sector witnessed during December but remains low during other months.

The Solar and Renewable Energy sector garners substantial investments during November.

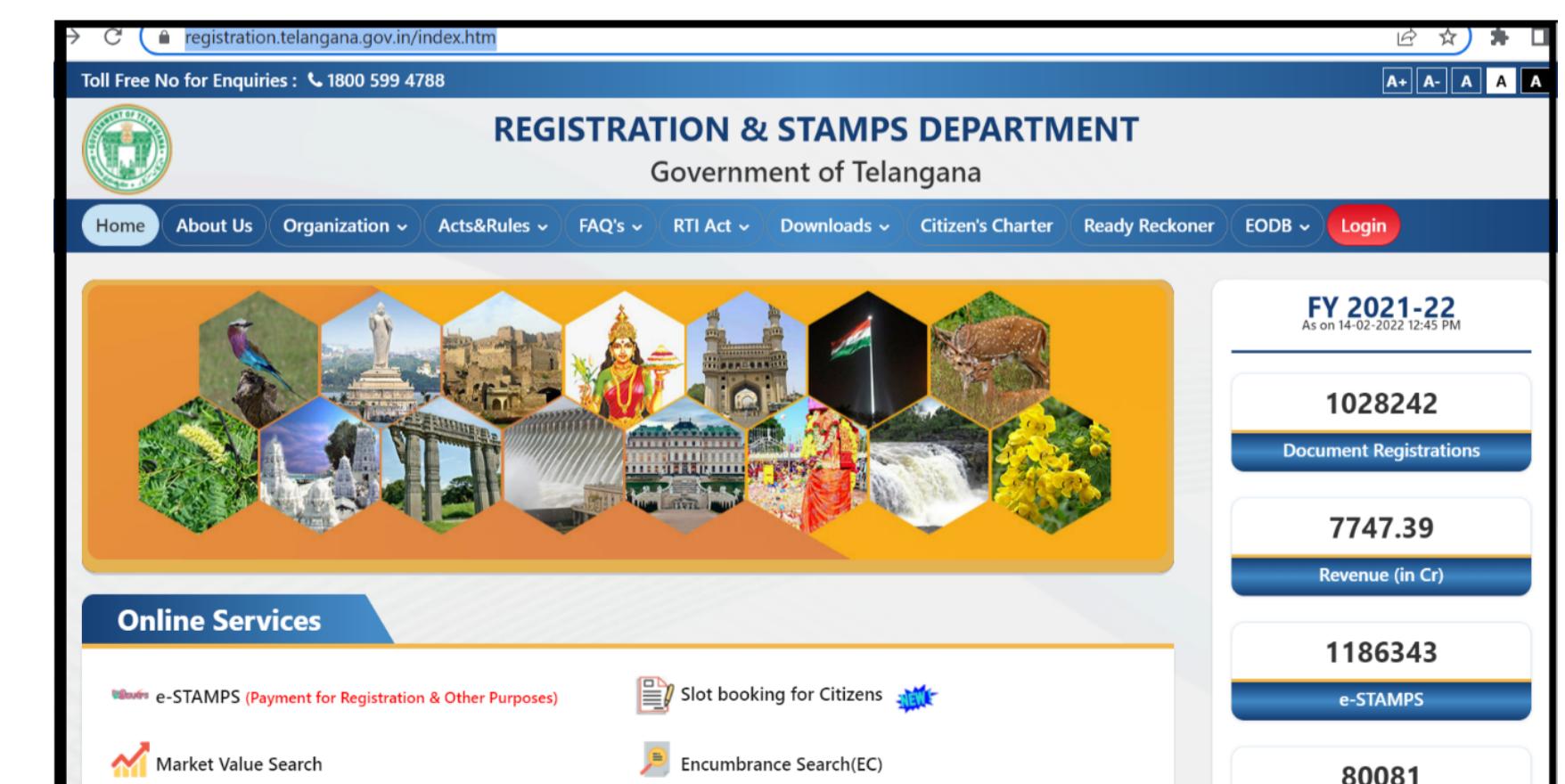
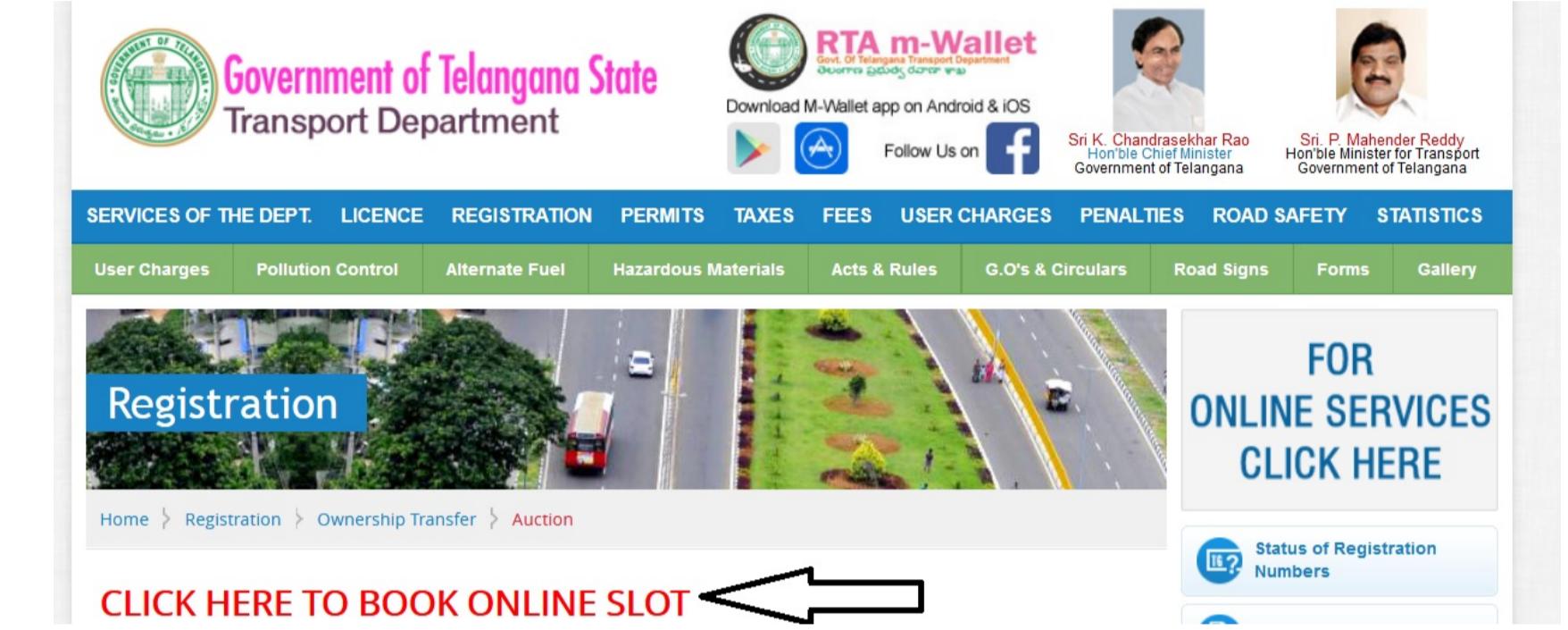
### Seasonal Investment Trends by Sector and Months

sector ● Agro ba... ● Automo... ● Beverages ● Cement,... ● Electrica... ● Enginee... ● Fertilizer... ● Food Pr... ● Granite ... ● Industri... ● Others



## Top Insights and Recommendations:

- > Due to the pandemic COVID impact, although we can see that investments have been increasing across sectors but the employment has been steadily declining. To enhance employment opportunities, the government can implement skill development initiatives, promote Entrepreneurship, leverage technology and support SMEs.
- > People are expressing more interest in purchasing pre-owned vehicles over new ones, indicating a growing trend of resource reuse and a preference for used cars. This can lead to reduced sale of new vehicles. We recommend that the government enhance and expand certified pre-owned vehicle programs to ensure the quality and reliability of used cars. In addition to this if financial incentives are provided such as reduced taxes or registration fees, for purchasers of pre-owned vehicles would encourage this eco-friendly choice and contribute to environmental sustainability.
- > Trend shows that transport vehicles count is increasing while non-transport vehicles are showing a decline. This suggests a thriving economy with growing logistics and transportation sectors, potentially generating more job opportunities and boosting local economies. Government can invest in robust public transportation systems, offer incentives for eco-friendly vehicles, encourage carpooling and cycling as some of the options.



## Secondary Research

### Electric Vehicle & Energy Storage Policy 2020-2030:

The policy offered financial incentives for electric vehicle manufacturing and encouraged charging infrastructure development. It also supported by providing exemption of road tax and registration fees. The policy's impact on economic growth and investments can be observed through increased EV adoption after the implementation. The Telangana Electric Vehicle and Energy Storage Policy 2020-2030 intends to achieve substantial reduction in total cost of transportation for personal and commercial purposes. The policy builds upon the FAME II scheme being implemented by Govt.



### TSiPASS : The "Telangana State Industrial Project Approval and Self- Certification System (TS-iPASS) Act, 2014" (Act 3 of 2014)

The Telangana Government has enacted the TS-iPASS Act, 2014" (Act No.3 of 2014) for speedy processing of applications for issue of various clearances required for setting up of industries at a single point based on the self-certificate provided by the entrepreneur and also to create investor friendly environment in the State of Telangana. As a benefit of this all departments connected for establishing and operation of an Enterprise brought under purview of TS-iPASS. Time Limits set for each approval varying from 1 day to a maximum of 30 days depending upon the complexity of the approval. Pre-Scrutiny of the applications at State Level and District Level to assist the entrepreneurs in a proper submission of applications and to avoid delay in processing the files by the departments. Making mandatory for the Competent Authorities to seek shortfall/additional information required, if any, only once, within three days from receipt of the application. Empowering the Entrepreneurs with Right to clearances under TS-iPASS, to know the reasons for delay if any in getting the clearance within time limits and penalizing the officers responsible for the delay.

