India at the centre stage of global investment

Seize the India moment



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AEROSPACE AND DEFENCE

INDIA'S UNIQUE VALUE PROPOSITION

Invest in India. Grow with the world.

Robust economy

Fastest-growing major economy	Real GDP growth of 7.7% in FY26, despite global headwinds, with 6.7% growth projected for FY27 by the RBI
Rising economic powerhouse	Forex reserves of US$672.6 billion
Domestic market attractiveness	1.4 billion people with 1.34 billion telephone subscriptions and 23.2 billion UPI transactions worth INR29.9 trillion in May 2026

Policy reforms

Infrastructure investment	Aiming for INR12.2 lakh crore public capex in FY27 and a US$1.61 trillion portfolio of live projects under the National Infrastructure Pipeline
Enhanced business environment	Expanded trade outreach, logistics modernisation, digitised and decriminalised compliance and faster insolvency resolution
Investor-friendly policies	Launched initiatives such as Make in India, PM GatiShakti, Product Linked Incentive Scheme and liberalised FDI norms to attract global investors

Strategic sectoral focus

Targeted FDI growth	Sector-specific manufacturing push, FDI reforms and FTAs, with exports targeted at US$1 trillion in FY27 and US$2 trillion over the next 5 years
Future-ready industries	Backing sunrise sectors such as AI, deep tech, biotech, digital economy, energy transition and strategic technologies through an INR1 lakh crore RDI fund

Trade evolution

Global access	19 FTAs and 57 FTA partner countries representing more than 61% of the global GDP
Trade acceleration	Momentum due to India–UK CETA, India–EFTA TEPA, India–EU FTA (announced) and India–USA Interim Agreement (framework announced)

FTAs as business enablers

Enhanced market access | Binding tariff certainty | Trade facilitation | Regulatory harmonisation of SPS/TBT standards Encouraging private sector FDI | Resilient supply chains | Technology transfer | Business certainty and predictability

DELOITTE ADVANTAGE

Deloitte member firms serve* 84%** ***of the 2025 Fortune 500 companies (as of 2025)

150+ ***Countries & territories served***

760+ ***Offices***

473,000 ***Professionals globally***

Industries

- Consumer
- ER&I
- FS
- LSHC
- TMT
- G&PS

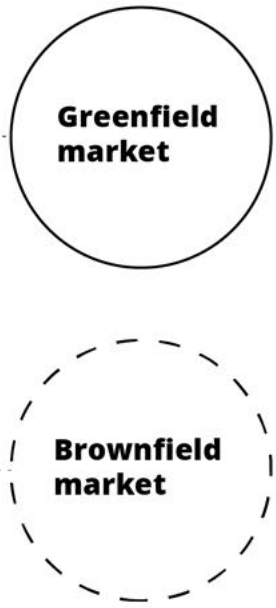
Services

- Audit & Assurance
- Tax
- Technology & Transformation
- Strategy, Risk & Transaction



Deloitte India offers E2E solutions

- Location assessment/ site identification
- Regulatory compliance
- Incentive structuring
- Aftercare



Deloitte.

- **Highest in all 6 use cases in the** Gartner® Critical Capabilities for Cloud ERP Services
- **Top 15** sourcing standout in the global and Americas regions for the managed services market in the Q2 Global ISG Index™

Firm of the Year

- India Tax Advisory by International Tax Review
- ITR's Tax Technology
- Tax Compliance & Reporting
- Global Executive Mobility
- Indirect Tax Advisory
- Tax Policy
- Tax Disputes Advisory in APAC

Leader in:

- The inaugural Gartner® Magic Quadrant™ for Digital Technology and Business Consulting Services
- Leader in the Everest Group's PE Services PEAK Matrix®
- The Inaugural Gartner® Magic Quadrant™ for Supply Chain Strategy, Planning & Operations Consulting 2026
- The Everest Group's Guidewire Services PEAK Matrix® Assessment
- The inaugural IDC MarketScape Worldwide Operational Technology Security Services Vendor Assessment

Sources:
PIB, IBEF, Invest India, RBI, NPCI, DPIIT, World Bank, WHO, MNRE, Defence Investment Portal (Ministry of Defence), IRENA

SECTORS OF THE FUTURE

HEALTHCARE

Why invest?

- Rapid adoption of deep tech to lower operating costs and bridge the rural–urban gap
- Up to 100% FDI under the automatic route permitted for hospitals and healthcare infrastructure

Future market

- Indian private hospitals market is projected to reach US$202 billion by 2030
- The health insurance market is expected to grow by an average of 7.2% per year over 2026–2030

FINANCIAL SERVICES

- 100% FDI permitted across most insurance segments
- Expansion of India's Digital Public Infrastructure through UPI, AA, ULI and CBDC with UPI powering 49% of global real-time payment transactions
- India's digital lending market is projected to reach US$515 billion by FY30
- Anticipated growth of India's WealthTech market is US$95 billion by FY30 from US$20 billion in FY20

AUTO AND AUTO COMPONENTS

- World's third-largest automobile market
- Strong support through government schemes & localisation initiatives, investments in EVs, automotive electronics, software-defined vehicles and advanced manufacturing
- The auto components industry is projected to reach up to US$200 billion by 2030
- India aims to achieve 30% EV penetration by 2030 by expanding charging infrastructure and localisation initiatives

GLOBAL CAPABILITY CENTRES

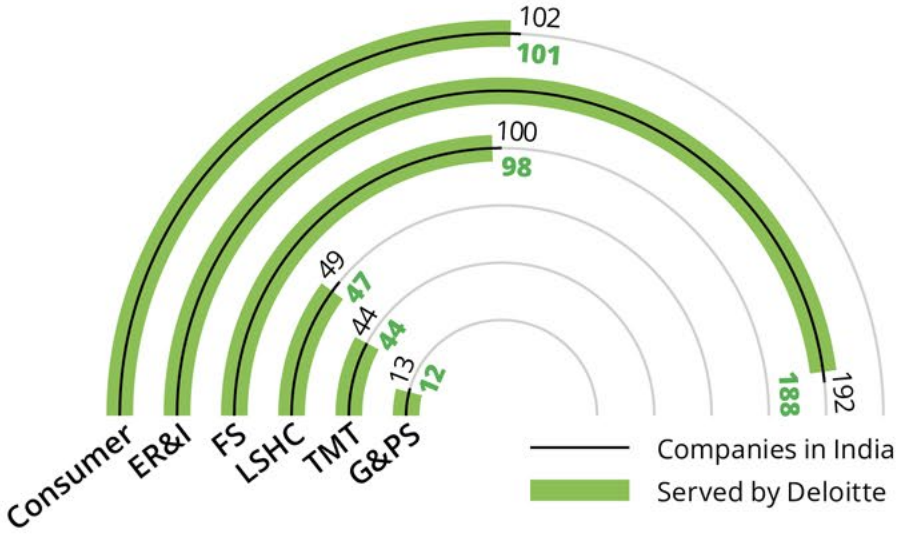
- Total GCCs: 2,100; GCC revenue: US$98.4 billion; Installed talent: 2.36 million (FY26)
- Strong GCC ecosystem support through a skilled talent pool driven by Skill India and Digital India, pro-business reforms and plug-and-play infrastructure in manufacturing clusters
- Projected to reach nearly 5,000 centres, employing over 4–5 million professionals
- By 2030, GCCs are expected to contribute between US$155–US$199 billion in gross value added to the economy

SECTORS OF THE FUTURE

Why invest?	Future market
SEMICONDUCTORS	
• ISM 2.0 approved with the target of building the semiconductor ecosystem on 6 key pillars: design, machines & materials, setting up more fabs, strengthening the ATMP/OSAT industry, R&D and talent development	• The size of the Indian semiconductor market is expected to reach US$100–US$110 billion by 2030. • India aspires to account for ~10–13% of the global semiconductor market, gearing up for a US$200 billion industry by 2035
RENEWABLE ENERGY	
• Government incentives, affordable financing, solar parks and dedicated investor facilitation channels • 100% FDI permitted under the automatic route • India ranks third globally in renewable energy installed capacity	• "Panchamrit" goals to accelerate India's clean energy switch • Goals: 500 GW non-fossil energy capacity, 50% energy requirements from renewable energy, reduce projected CO_2 emissions by 1 billion tonnes by 2030 and net-zero emissions by 2070
AEROSPACE AND DEFENCE	
• 74% FDI permitted under the automatic route and 100% via the government route • Policy enablers: Defence Acquisition Procedure 2026 draft, Buy Indian-IDDM preference, positive indigenisation etc.	• India has set a target of reaching US$6.02 billion (INR50,000 crore) worth of annual defence exports by 2028–29. • Drone and counter-drone manufacturing, AI, robotics, additive manufacturing and digital twins are becoming explicit defence innovation priorities
EDUCATION	
• Strong policy tailwinds under NEP 2020, the FY26–27 education budget, university townships, AI/AVGC labs, girls' hostels and flexible credit-based higher education pathways are creating opportunities	• India's education market is projected to reach ~US$313 billion by FY30 • India's EdTech market is valued at US$7.5 billion and projected to reach US$29–30 billion by 2030-31

DELOITTE INDIA CLIENTELE

(December 2025 BT500*)



**BT500 - Business Today publication covering India's top 500 performing companies*

DELOITTE SHAPING A SUSTAINABLE FUTURE...

Deloitte's "WorldClimate" initiative promotes responsible sustainable climate solutions - **94% energy from renewable sources (FY23)**



The "WorldClass" initiative aims to impact **100 million individuals by 2030**

Only Big Four to achieve a Positive rating in the Gartner Sustainability Assessment 2024

Haryana, with support from Deloitte, implemented a Crop Residue Management programme, resulting in a 54% drop in stubble burning and **saving 5,500 lives**

HEALTHCARE

Key investment opportunities

Healthcare infrastructure

- Increasing beds in existing hospitals
- New hospitals in Tier-2 and 3 cities
- Developing speciality Centres of Excellence (oncology, cardiology, neurosciences, transplant and orthopaedics)
- Newer medical colleges, day care and ambulatory surgery centres and rehabilitation & post-acute care centres
- Public–private partnership healthcare projects
- Smart hospitals and digital infrastructure aligned with ABDM

HealthTech

- AI, robotics and automation in healthcare delivery
- Digital patient engagement platforms (electronic health records/electronic medical records) and hospital information systems

...Digital therapeutics and connected care platforms

...Cybersecurity and health data management solutions

Diagnostics and preventive care

...Preventive health screening and wellness centres

...Genomics, molecular diagnostics and precision diagnostics

- Home diagnostics and decentralised testing
- AI-enabled pathology and radiology

Medical tourism

- Integrated medical tourism ecosystems
- International patient care facilities and support services

...Wellness and recovery centres

FINANCIAL SERVICES

Greenfield investment opportunities	Brownfield investment opportunities

Commercial banks

- Establishing AI-first digital banks and specialised banking platforms for MSMEs, supply chains and embedded finance, using ULI, Account AA and Digital Public Infrastructure
- GIFT IFSC banking, treasury and cross-border financial services operations

- Modernising legacy core banking, lending, risk and compliance platforms using AI, cloud and automation
- Expanding embedded finance, cross-border payments and digital banking capabilities

Insurance companies

- Building embedded insurance, cyber insurance, climate-risk insurance and parametric insurance offerings
- Reinsurance and captive insurance operations in GIFT IFSC

- Modernising underwriting, claims, distribution and customer servicing through AI and agentic AI
- Strengthening bancassurance and ecosystem-based distribution collaborations

NBFCs

- Establishing digital lending platforms focused on MSMEs, agriculture, supply chain finance, EV financing and affordable credit
- Creating embedded lending solutions with FinTech ecosystems

- Upgrading lending, collections and servicing through AI, automation and analytics
- Expanding co-lending collaborations with banks
- Strengthening fraud management, governance and risk infrastructure

Payments and FinTech

- Developing cross-border payment infrastructure using global UPI expansion
- Launching embedded payment platforms, merchant acquiring and B2B payment solution

- Expanding merchant ecosystems through value-added financial services
- Upgrading payment infrastructure using AI-driven fraud detection and cyber resilience

FINANCIAL SERVICES

Asset and wealth management

Greenfield investment opportunities

- Launching digital wealth management platforms targeting retail, affluent and HNI investors
- Establishing ETFs, alternatives, private market and WealthTech businesses

Brownfield investment opportunities

- Modernising client onboarding, advisory and engagement using AI
- Expanding digital investment platforms into Tier-2 and Tier-3 markets

Mutual funds and pension

- ...Launching retirement-focused mutual funds, pension products and target-date funds
- ...Building National Pension System-linked digital retirement platforms

- Expanding pension fund management capabilities
- Enhancing retirement planning using AI-enabled advisory

Cooperative and regional financial institutions

- Developing digital banking platforms for cooperative banks and rural financial institutions
- Building AI-enabled rural lending and financial inclusion ecosystems

- Strengthening operational resilience through cloud migration and AI-enabled monitoring
- Expanding digital banking and financial services across rural and semi-urban markets

AUTO & AUTO COMPONENTS

Batteries

Greenfield investment opportunities	Brownfield investment opportunities
...Advanced Chemistry Cell (ACC)/Gigafactory manufacturing ...Battery Energy Storage Systems (BESS) manufacturing and integration ...Battery recycling and critical mineral recovery ...Battery component manufacturing (cathode, anode, separator and electrolyte) ...Second-life battery facilities	• Capacity expansion • Technology and automation upgrades • Recycling efficiency improvements • Conversion of legacy battery facilities to Li-ion/ACC production • BESS and compliance upgrades

EVs

• EV manufacturing plants • EV charging infrastructure • Battery swapping networks • EV components and power electronics manufacturing • EV software and charging platforms • EV fleet depots and electrification hubs • EV charging parks and integrated mobility hubs	• Expansion of existing EV manufacturing facilities • Charging network expansion • Technology and localisation upgrades • ICE-to-EV facility conversions • Fleet electrification and depot modernisation projects • Smart charging and energy integration upgrades

SEMICONDUCTORS

Greenfield investment opportunities	Brownfield investment opportunities
Design (fabless)	
• New design centres • R&D facilities • Incubators and innovation	...Existing design centre upgrades ...R&D capability expansion ...Collaboration with local companies
Manufacturing (foundry)	
...New foundry plants ...Advanced manufacturing plants ...Collaboration with academia	...Manufacturing facility modernisation ...Tech transfer and collaborations
OSAT	
...New assembly and testing units ...Specialised OSAT services ...Supply chain development	• Existing OSAT facility enhancement • Advanced packaging and testing technologies • Integration with the local supply chain
IDMs	
...Semicon manufacturing ecosystem ...High-tech manufacturing complexes ...Training and skill development centres	• Existing IDMs' expansion • Manufacturing technology upgrades • Collaborative ventures

RENEWABLE ENERGY

Greenfield investment opportunities	Brownfield investment opportunities
Green hydrogen	
• Green hydrogen production facilities, including green ammonia and green methanol derivatives • Hydrogen storage solutions • Hydrogen refuelling stations and pilots for mobility, shipping and hard-to-abate industrialuse cases • Green energy industrial parks, hydrogen hubs, testing facilities, certification support and skilling centres	• Existing plant upgrade projects • Infrastructure enhancement projects • Operational/cost efficiency projects
Batteries and energy storage	
...New lithium-ion battery plants ...ACC battery manufacturing plants ...Battery recycling facilities ...Energy storage systems for grid stabilisation, including BESS for renewable integration, ancillary services and round-the-clock power	• Plant expansion of existing facilities • Tech upgrades in existing facilities • Recycling efficiency projects
EVs	
...EV manufacturing plants for cars/buses/two-wheelers ...EV charging infrastructure ...EV component manufacturing plants	• EV fleet conversion projects • Charging network expansion projects • Component upgrade projects
Solar	
...Large-scale solar power plants ...Rooftop solar installations ...Solar PV manufacturing across modules, cells and upstream ingots/wafers	• Plant modernisation projects • Efficiency improvement projects • Capacity expansion projects for existing plants, with ALMM-aligned solar cell/module sourcing

RENEWABLE ENERGY

Greenfield investment opportunities	Brownfield investment opportunities
Wind	
• Fresh on/offshore wind projects, including first offshore wind projects and associated port upgrades • Wind turbine manufacturing plants and component supply chains for onshore, offshore and repowering demand	• Upgrades involving modern tech and processes; repowering, hybridisation and digital O&M for wind assets • Expansion of existing on/offshore projects • Operational efficiency projects
Hydropower	
...Fresh hydro power plants ...Pumped storage hydropower plants and PSP equipment/EPC ecosystem	• Efficiency improvement projects • Pumped storage expansion projects
Regulatory and policy	
• Projects promoting green energy • Initiatives for RPO and ESO enforcement to boost renewable energy adoption	...Projects to enhance green energy regulation compliance ...Enforcement of RPO and ESO in all current facilities

AEROSPACE AND DEFENCE

Greenfield investment opportunities	Brownfield investment opportunities
Military fixed wing	
• Fighter jets, transport aircraft, civil/regional aircraft components, UAVs and autonomous platform manufacturing • Aviation technology R&D centres for avionics, propulsion, materials, certification and software-defined systems • JVs for fixed-wing aircraft development and production with Indian firms	• Plant upgrades for better production and new tech • Capacity boost of current plants for higher demand • Investment in cutting-edge tech and automation
Civil aerospace and MRO	
...Aircraft MRO, component repair, pilot training, skilling and aerospace manufacturing hubs ...Cargo-logistics, sustainable aviation, advanced air mobility and component manufacturing facilities	• MRO facility enhancement for better support • Training, certification, component repair and aerospace services capacity upgrades around existing aviation clusters
Naval vessels and surface combatants	
• New shipyards for naval construction • Innovation hubs for naval tech • Collaborations with Indian firms on defence systems	• Shipyard modernisation to boost efficiency and output • Advanced technology integration into naval vessel production • Shipyard capability expansion for a range of naval vessels
Missiles and missile defence systems	
• New missile manufacturing units • Missile testing and evaluation units • Technology transfer agreements between foreign and Indian players	• Missile production boost and new technology integration • Testing facility enhancement for advanced missile development • JVs with Indian firms for missile defence projects

AEROSPACE AND DEFENCE

Greenfield investment opportunities	Brownfield investment opportunities
Military rotorcraft	
• New military helicopter manufacturing plants • Upgraded MRO facilities for military rotorcraft • Training centres for rotorcraft pilots and maintenance staff	• Helicopter manufacturing upgrades for efficiency and new tech • MRO facility enhancement for better support • Line expansion for new rotorcraft
Artillery and military land vehicles	
• New artillery system manufacturing facilities • Fresh military vehicle production plants (tanks, APCs) • Innovation and testing labs for land vehicle technologies	...Plant upgrades to boost artillery and military vehicle production ...Existing facility capacity expansion for demand ...Advanced technology integration into production processes
Drones, autonomy and defence electronics	
• Drone, counter-drone, loitering munition, sensor, electronic warfare, cyber and AI-enabled defence systems	...Legacy platforms upgrades with indigenous sensors, secure communications, electronic warfare suites and autonomy kits

CONTINUE THE CONVERSATION



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