

Executive Summary

Census survey of industries in Navi Mumbai region

1. Introduction:

Employment is one of the most important indicators of Economic growth of any city. The structure of employment sector in and around Navi Mumbai can be studied in various ways.

The present report reveals the detailed profile of manufacturing sector. Total earmarked area for Navi Mumbai is 344 sq.kms spread across three 'Talukas' (Thane, Panvel, Uran) of two adjoining districts, Thane and Raigad. The development plan of Navi Mumbai also envisaged the improvement of life and commerce in the 21st century city. It offers the advantage of a business and commercial capital of the future. At the time of formation of CIDCO, the only economic input available for Navi Mumbai was the Trans Thane Creek Industrial belt and Taloja Industrial Estate of MIDC. The last survey of manufacturing industries was conducted by CIDCO in 1990. During the last 14 years, industrial scenario has changed

drastically. Many industries have opted for diversification into new areas and a lot of new industries have also come up.

2. Need of the Survey:

Statistics section of CIDCO has been conducting periodical surveys to study development trends, economy and sustainable growth of Navi Mumbai. Now Navi Mumbai has a population of 1.7 millions. This data is essential to form the benchmark to design the welfare and development policies for human resources in Navi Mumbai.

The present study is census survey of manufacturing industries at MIDC in Trans Thane Creek and Taloja Industrial area, Jawahar co-operative Industrial Estate Ltd., Panvel Industrial Co-operative Estate Ltd. and Uran regions excluding IT and service sectors. Under this survey a complete enumeration of manufacturing industries is carried out. The present report gives the detailed analysis and important statistical information on various aspects of economic activities in industrial area.

3. Objectives of the Survey:

To obtain, compile, analyze, organize and report the vital data related to the following parameters of Industries in Navi Mumbai region.

- Total number of Industries, size & type of Industries
- Total employment & kind of employment

- Total value of raw material, input, output production, capital Investment and turnover
- Need for residential plots/premises for employees
- Demand of commercial plots/offices/ corporate offices.
- Total consumption of electricity and water
- Type of pollution created & measures taken
- Satisfaction with Physical infrastructure
- Expansion plan & growth of industries

4. Industrial Area:

The growth of Industries in Trans Thane Creek started from the mid sixties with capital investment of Rs. 174 crores. The total number of units up to 1970 was 44, which increased to 3,800 as on 2006. The area has concentration of capital-intensive industries. The present survey covers nearly 5400 Industrial plots in the Navi Mumbai region. The Industrial belt includes Trans Thane Creek (TTC) Taloja, Jawahar, Panvel, and Uran area. The TTC area spread over 2,562 Ha, and the total number of plots are 3824. Taloja Industrial area covers 900 Ha. with 1,200 plots. Jawahar Co-operative industrial Estate & Panvel Industrial Co-operative Estate Ltd stretched on 28 Ha. and 12 Ha. with total no. of 248 and 103 plots respectively. The following table presents the Industrial area surveyed, number of plots and number of industries.

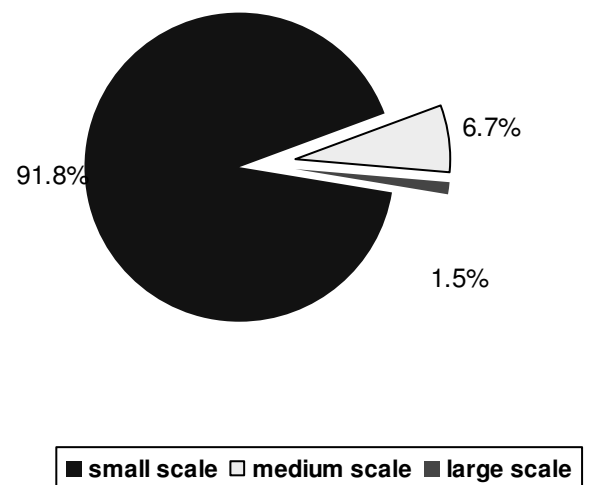
Industrial Area:-	Area(Ha.)	No. of plots	No. of industries
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1. TTC (Trans Thane Creek)	2562	3824	2881
2. Taloja Industrial Estate	900	1200	841
3. Jawahar Cooperative Industrial Estate	28	248	115
4. Panvel Industrial Co-operative Estate	12	103	87
5. Other Area - Uran			4
Total	3502	5375	3928

The totals of Industrial units are 3928. Number of industrial units is less than the number of plots because some of the plots are clubbed together. TTC area has the maximum Industries with 2,881 units i.e. 73% followed by Taloja with 841 units (21%), Jawahar with 115 units (3%) , Panvel with 87 units (2%) and Uran with 4 units (<1%).

Size of Industries:

Starting with a small base, the mid sixties witnessed accelerating pace of industrial growth. The chemical and fibres of India established their man-made fibre plant in 1965, which was followed by the setting up of number of manufacturing plants. Industries were classified into three classes based on investment in plants & machinery. **Small**

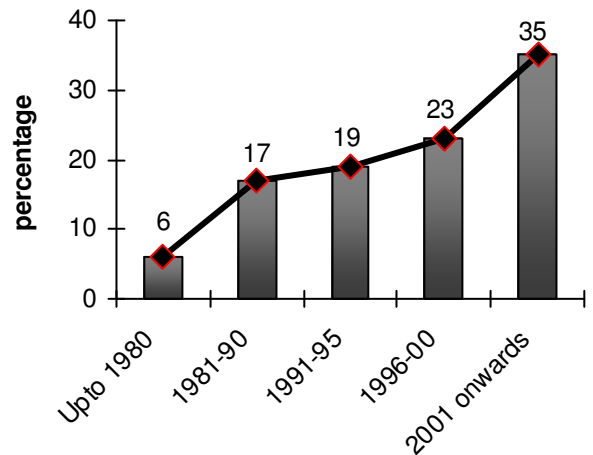


Scale Industries(SSI) have investment less than Rs. 1 crores, **Medium Scale Industries(MSI)** have investment in plants & machinery between Rs. 1 crore

to Rs. 10 crores and **Large Scale Industries (LSI)** have investment in plants & machinery more than Rs. 10 crores.

6. Year wise Establishment:

The total number of the industries up to 1980 was 6%. The growth of the industries in next decade 1981-91 was 17%, in 1991-95, 19% of the industries were established and next five years, i.e. 1996-2000, 25% of the industries were added. From 2001 to 2006, the growth of industries escalated by 35%.



7. Status of Industries:

Out of the total number of industrial units (3928), the working units are 2292 (58.3%) and the closed units are 686 (17.21%). As compared to 1990 the total no. of industrial units were 2121, which shows a growth of 85% in 15 years.

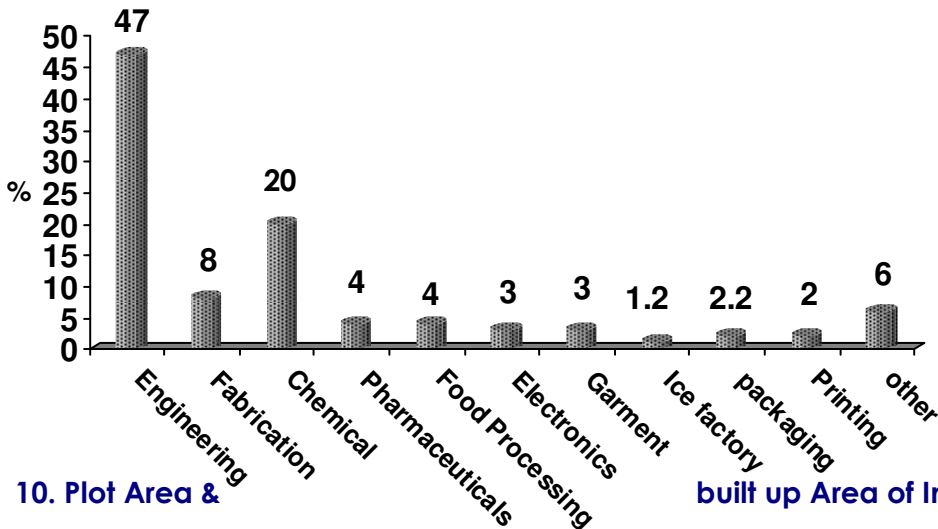
	No.	%
Working units / godown	2292	58.34
Closed units	686	17.21
No response	408	10.39
Under Construction	265	6.74
Vacant plots	277	7.05
Total	3928	100.00

8. Location of Head Office:

Nearly 75% of the industries are having their head offices in Mumbai, around 24% at plant site and 1% in other cities.

9. Type of Industries:

The total Industrial units are classified into 14 groups. Engineering units comprise of 47% followed by Chemical units 20%, Fabrication units 8%, Pharmaceuticals & Food processing units 4% each, Electronics and Garment units 3% each, Packaging and Printing about 2% each, Ice factories 1.2% and Stationary units 0.4% and other units such as Electrical, Computers, Oil, Automobile etc are 6%.



10. Plot Area &

built up Area of Industries:

Around 60% Industries have plot area less than 1,000 sqm, 21% industries have from 1001sqm. to 2500 sqm., 9% have 2501 sqm to 5000 sqm and 10% have above 5,000 sqm.

Two-thirds of the industries have built up area less than 1000 sqm. Around 10% industries have built up area between 1001 to 2500 sqm and 7% have built up area above 5,000 sqm.

Average plot area - 2,738 sqm

Average built up area - 1,114 sqm

11. Employment:

The total number of employees in the surveyed industries are 2,47,484 out of which 1,76,774 are regular employees and 70,710 are labourers (from secondary source), which is about 40%. The industries are not ready to share the information about labourers due to various reasons. The estimated employment which works out to about 5 lakhs includes present employment and units under construction/vacant spaces /no response and labour force. The average employment per unit excluding the labourers is 85.48.

Existing	:	1.77 lakhs
Labour (40%)	:	0.71 lakhs
Total Existing	:	2.48 lakhs
Estimated	:	1.59 lakhs
Labour Estimated	:	0.63 lakhs
Total estimated	:	4.70 lakhs

12. Average employment by type of Industries:

In engineering Industries the average employment per unit is 63, in fabrication 54, in chemical 95, in pharmaceuticals 74 , in food processing 322, in electronics 261, garments 95 , in Ice factory 59, in packaging 45, in printing 54, in stationary 43 and in others 64.

13. Type of Employment:

Sixty nine percent of the employees are working in the industrial units as permanent employees and 31% are employed on temporary/contractual basis. In addition to this, about 40% are seasonal labourers who keep migrating in and out.

Permanent Employees	: 69%
Temporary/Contract basis /and others	: 31%

There are 27% of the Employees working as Supervisors/Executives and Professionals, 34% as skilled workers, 31% as semi-skilled workers and 8% unskilled and others.

14. Education status of the Employee:

Almost 28% of the employees are graduates, 64% have secondary & higher secondary education including ITI Diploma and up to 8% have primary education.

15. Age of Employees:

Nearly 21% of the work force is below 25 years of age and **64% belongs to age group 26-40 years**. 10% are between 41-50 years and 4% belongs to 51-60 years of age group and 1% is above 60 years.

16. Residential Location of the Employees:

Around 58% of the work force resides in Navi Mumbai and 10 % in TTC area. Around 32% come from Mumbai and its suburbs including Thane, Kalyan and other surrounding places.

17. Housing Requirement for the Employees:

About three fourth of the Industries don't have housing requirement because more than 58% employees reside in Navi Mumbai. Therefore the response to the housing requirement is given by 24% industries only. Out of 24%, about 57% of Industries desire for plots and 43% for premises.

Out of these 57% industries who opted for plot, nearly 43% have expressed their need for plots admeasuring up to 500 sqm. and 57% desired for plots, above 500 sqm.

18. Ownership of Industries:

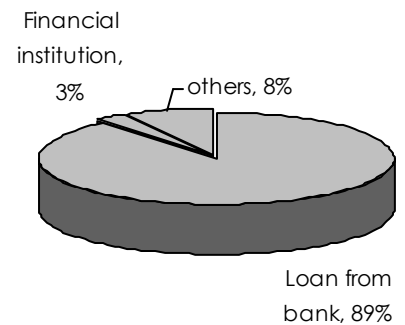
About 90% of the industries are owned by industrialist. Out of that, 65% are owned by single owners and 25% owned on partnership basis. The balance 10% industries are on rental/lease basis.

Owned - 90%

Rental-10%

19. Source of Finance:

Out of the total loan for setting up the industries, 89% have borrowed finance from banks, 3% from financial institutions and 8% from other sources.



20. Economic profile of industries

The total investment in plant and machinery is Rs. 23,804 crores (by 2292 units) and estimated Rs.45,214 crores (for 3928 units). In 1990 the total investment was Rs.175.76 crores.

Total turn over of the industries is Rs 2,82,897crores and estimated turnover is Rs. 5,37,341Crores.

Total Investment	:	23,804 crores
Estimated	:	45,214 crores

Total turn over	:	2,82,879 crores
Estimated	:	5,37,341 crores

21. Assets:

About 79 % industries have total assets is less than or equal to Rs. 10 crores and 21% have above Rs. 10 crores. Total assets of the industries are Rs. 4,748 crores and estimated is Rs. 9,017crores.

22. Consumption of Electricity:

MSEB has fixed 1,33,500 maximum units per day for the industrial belt.

Nearly 71% of Industries have electricity consumption more than 1000 units.

Around 41% of the industries pay electricity bills up to Rs. 10,000/- and 51% pay above Rs. 10,000/-.

23. Consumption of Water:

About 94% of Industries pay water bill up to Rs. 3,000/-. NMMC has fixed 35 to 50 MLD for TTC area and 23 to 32 MLD for Taloja area.

24. Pollution:

Industrial units are categorized for creating pollution into three types of pollution in the present study namely Air, Water and Noise. Industries categorized for creating air pollution are 7%, water pollution 69%, noise pollution 3%. One fifth (21%) of industries belong to the category of “No pollution.”.

The amount spent on pollution control by 51% of industries is more than Rs. 2.0 lakhs.

25. Physical Infrastructure:

More than 47% of the industries are happy with the condition of roads, 86% with water supply, 75% with electricity, 64% with pollution control, 56% with security facility, 50% with overall cleanliness, 41% with health facility, 63% with transport facility, 65% with parking facility and 41% with garbage disposal.

26. Mode of Transport used by employees:

Two fifth (41%) of the employees travel by ST/NMMT/BEST buses or company vehicles, 8% travel by train, 7% travel by four wheelers, 6% by two wheelers, 2% by three wheelers and 36% walk down to their work place.

28. Expansion plan for future

Nearly 50% of the industries are positive about expansion and growth of their business in coming future. Based on the type of industries, about 47% of the engineering industries, 40% in fabrication, 41% in chemical industries, 52% in pharmaceuticals, 38% in food processing, 50% in petrochemical, 46% in dyes & intermediaries, 58% in steel & allied, 49% in electronics and 38% in other sector have plan for future development.

29. Opinion on the Future prospects:

Industries were asked their opinion on the future prospects of particular trade with respect to government policies. Nearly one third of the industrialists feel that there is a bright future, 45% feel that they may continue in the same pace, 6% say that they are likely to die out in due course of time and 20% feel that there would be a requirement of new mode of operation.