



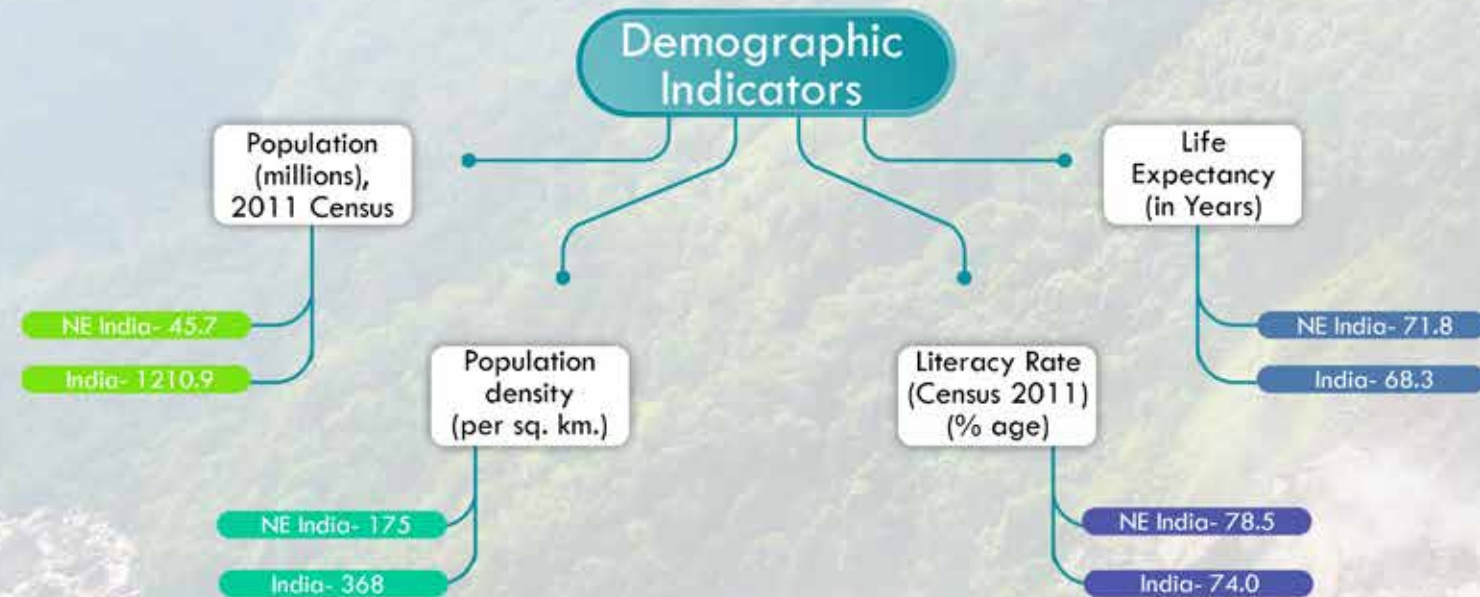
MINISTRY OF DEVELOPMENT
OF NORTH EASTERN REGION

Sector Profile Infrastructure and Logistics



North East Overview

The North-eastern Region (NER), which includes the eight States of Arunachal Pradesh, Assam, Manipur, Meghalaya, Mizoram, Nagaland, Sikkim and Tripura, is the easternmost region of India. Since each state has a border with at least one of the five nations to the east of the country, this area serves as a gateway to Southeast Asia and is of great strategic importance. Furthermore, the NER is widely recognized as one of the most diverse regions in Asia, characterized by a rich tapestry of ethnicities and languages. Each state within NER boasts a unique blend of distinct cultures and traditions. The Northeast region of India is a well-known biodiversity hotspot that is also home to a rich mix of cultures. In addition, the region is blessed with abundant natural resources that are yet to be fully explored and exploited. The region also holds a significant stake in the country's 'Act East Policy,' which is aimed at promoting economic, political and cultural ties with Southeast Asia. With a wealth of natural resources, human resources and potential for agriculture and horticulture, the region is rapidly emerging as a hub for sustainable manufacturing and service industries. Additionally, the region's rich ethnic, religious, linguistic and cultural diversity makes it a highly attractive destination for tourists, offering significant potential for growth and development in the tourism sector. With an area of 2.6 lakh sq. km, the NER accounts for about 7.98 per cent of the total geographical area of India while being home to 3.78 per cent of India's total population. The region is characterised by a mixed topography of hills and plains, with hills occupying 70 per cent of the land area. With a significant tribal population accounting for around 54 percent of its total population, especially in the hilly areas, the Northeast region of India is unique in its diversity. The region is home to approximately 135 Scheduled Tribe groups out of a total of approximately 705 across India. With plentiful natural resources, agro-horticultural and forest resources, hydroelectric potential, oil and natural gas and mineral deposits, the northeast region is well poised for investment and economic growth.



NORTHEAST OVERVIEW



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Key Economic Indicators

- The Region's GSDP at current prices is INR 9.26 lakh crore in FY 2023-24
- Compounded Annual Growth Rate (CAGR) of GSDP of North-eastern States grew at 8.17% from FY2015 to FY2022.
- Infrastructure: The region has a total of 16,125 km of national highways.
- Infrastructure: 20119 Km of state highways, and 2,657 Km of major district roads
- The average road density per 1000 Sq Km of area is 2258.5 Km against the national average of 1926.02 Km

Snapshot of NER

States/Parameters	Airports	State High ways (Km)	National Highways (Km) (2022)	Waterways (Km)	Railway (Km)	International Border (Km)	GSDP 2020 -21 (lakh cr)	Per Capita	Population (2011)	Literacy rate (%)	Area (Sq. Km)	Availability of Power (Crore Units)
Arunachal Pradesh	4	13500	4285.39	311	12	1866	48028	1,99,992	1,383,727	65.4	83,743	55
Assam	7	2530	4076.91	2024	2519	530	570243	1,19,308	31,205,576	72.2	78,438	605
Manipur	1	781	1840.34	44	13	398	45558	1,11,853	2,855,794	76.9	22,327	54
Meghalaya	1	768	1155.60	90	9	443	47381	1,23,896	3,366,755	74.4	22,429	161
Mizoram	1	170	1498.67	216	2	722	39356	2,15,144	1,097,206	91.33	22,081	38
Nagaland	1	650	1670. 47	276	11	215	45422	1,45,537	1,978,502	79.6	16,579	54
Sikkim	1	663	709.07		0	351	46773	5,20,466	610,577	81.4	7,098	45
Tripura	1	1057	888.61		265	856	84127	1,57,364	3,673,917	87.2	10,486	108
Total	17	20119	16,125.06	2961	2831	5533			46172054		263901	1113

*At current price base 2011-12

Advantage North East

Gateway to Southeast Asia: A strategic location that offers easy access to ASEAN markets.

Abundant Natural Resources: An abundance of oil, gas, coal, minerals, timber, medicinal plants, bamboo, forest products and an abundance of water for industries to exploit.

India's Green Hub: Home to lush forests and rich biodiversity, it is an ideal destination for ecotourism and agro based industries.

Diverse Cultural Heritage: A region with unique ethnic communities and traditions that offer investment opportunities in tourism and handicrafts.

Government Incentives: A range of incentives, including tax holidays, subsidies and reimbursements to support business growth. Low-cost Manufacturing Hub: Low labour costs compared to other parts of India and the world.

Skilled Workforce: A young, educated and skilled workforce that is proficient in English.

Growing Infrastructure: Rapidly developing infrastructure, including new industrial parks and technology parks.

Stable Business Environment: A favourable business climate with a low crime rate, stable political environment and supportive government policies. Emerging Consumer Market: A growing consumer market with rising incomes and increased urbanization that offers immense potential for business.

Connected North East

Accessibility: The Indian government has undertaken several initiatives to upgrade the existing road infrastructure and build new highways, bridges and tunnels to enhance connectivity within the region and with the rest of the country

Road Connectivity: The Indian government has undertaken several initiatives to upgrade the existing road infrastructure and build new highways, bridges and tunnels to enhance connectivity within the region and with the rest of the country. One of the most significant projects is the ongoing construction of the 3,000-km long Trans Arunachal Highway, which will connect all the districts of Arunachal Pradesh, the easternmost state of India. Another noteworthy project is the Dhola-Sadiya bridge, which is the longest bridge in India and spans over the Brahmaputra River in the state of Assam. Moreover, the Indian government has also launched the Bharat Mala Pari yojana, a flagship highway development program that aims to construct 35,000 km of highways across India. Under this project, several highways are being constructed in the North East region, which will further improve connectivity and promote regional development.

Air Connectivity: New airports have been constructed and existing ones have been modernized and upgraded with state-of-the-art facilities, making air travel a more comfortable and convenient option for the people of the region. The government has also introduced various incentives to attract airlines to operate in the North East, such as reduced landing and parking fees, which has led to an increase in the number of flights to the region. With better air connectivity, the North East is now more accessible to tourists and businesses from other parts of India and the world. This has not only helped to boost the local economy but has also contributed to the growth and development of the region.

Rail Connectivity: The Indian Railways has taken steps to preserve the cultural and natural heritage of the region by introducing special trains that showcase the unique beauty and diversity of the North East. This has not only helped to promote tourism in the region but has also generated awareness about the rich cultural and natural heritage of the North East. The introduction of new trains and the extension of existing ones has also contributed to increased connectivity in the region. With better rail connectivity, the North East is now more accessible to tourists and businesses from other parts of India and the world. This has not only helped to boost the local economy but has also contributed to the growth and development of the region

Infrastructure and Logistics Sector in India – Industry Overview

India's infrastructure and logistics sector has experienced significant growth, positioning the country as a global economic powerhouse. The sector encompasses a vast network of roads, railways, ports and airports, facilitating seamless movement of goods and passengers. Strategic initiatives like the PM Gati Shakti National Master Plan and the Bharat Mala Pari yojana have been pivotal in driving this development.

Leading Practices

Integrated Planning: The PM Gati Shakti National Master Plan, launched in 2021, integrates various ministries, including Railways and Roadways, to ensure coordinated execution of infrastructure projects. This holistic approach enhances connectivity and reduces travel time.

Public-Private Partnerships (PPP): Encouraging private sector participation has led to efficient project execution and innovation in infrastructure development.

Technological Adoption: Implementing digital solutions and advanced technologies has improved project monitoring, maintenance and service delivery in the logistics sector.



Recent Development Projects

National Highways Expansion: India's National Highway network expanded from 65,569 km in 2004 to 1,46,145 km in 2024, with stretches of four or more lanes increasing 2.6 times from 18,371 km in 2014 to 48,422 km in 2024.

Bharatmala Pariyojana: Launched in 2017, this program aims to develop about 26,000 km of Economic Corridors. By November 2024, 18,926 km of roads were completed under this project.

Multimodal Logistics Parks (MMLPs): As part of the Bharatmala Pariyojana, 35 MMLPs are planned with a total investment of about ₹46,000 crore, expected to handle around 700 million metric tonnes of cargo once operational.

Civil Aviation Growth: The number of operational airports increased from 74 in 2014 to 157 by September 2024, marking significant growth in the aviation sector.



Policy/ Schemes Support



Infrastructure and Logistics Sector in North East India

– Industry Overview

Northeast India, comprising eight states—Arunachal Pradesh, Assam, Manipur, Meghalaya, Mizoram, Nagaland, Sikkim and Tripura—has experienced significant infrastructural advancements in recent years. These developments aim to integrate the region more effectively with the rest of the country and neighbouring nations, thereby enhancing economic growth and strategic connectivity.

Leading Practices



Integrated Development Initiatives

The Government of India has implemented various schemes to boost investments in the Northeast, including the Northeast Special Infrastructure Development Scheme (NESIDS) and the Prime Minister’s Development Initiative for North East Region (PM-DevINE). These initiatives aim to enhance infrastructure related to water supply, power, connectivity and promote tourism in the region.



Public-Private Partnerships (PPP)

Encouraging private sector participation has led to efficient project execution and innovation in infrastructure development in the Northeast Region. For instance, the Assam Logistics & Warehousing Policy and Multimodal Logistics Parks (MMLPs) encourage private sector participation, fostering efficient logistics solutions.



Technological Adoption

Initiatives like smart logistics parks, GPS-based cargo tracking and digital freight corridors are improving supply chain efficiency. The Tata Group’s semiconductor manufacturing plant in Assam is a major step toward high-tech industrialization.



Green and Sustainable Logistics

The region is embracing electric vehicle-based freight transport, inland waterways and renewable energy-powered logistics hubs, ensuring environmentally friendly trade and cargo movement.



Recent Development Projects

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Road and Transport Infrastructure

Under initiatives like SARDP-NE and Bharatmala-I, significant improvements have been made in road connectivity within the Northeast. In the fiscal year 2024-25, up to May 2024, a total of 78 km of National Highway roads were constructed in the NE States, with an expenditure of Rs. 2,859 crore up to June 2024.

Mega Bridges: Enhancing Connectivity

The Dhol-Sadiya Bridge (Bhupen Hazarika Setu), inaugurated in 2017, is a 9.15 km long bridge across the Brahmaputra River, connecting Assam’s Tinsukia district with Sadiya in Arunachal Pradesh, significantly reducing travel time and boosting regional economic activity. Similarly, the Bogibeel Bridge, a 4.94 km long road-rail bridge, links Dibrugarh in Assam to Dhemaji, enhancing connectivity between eastern Arunachal Pradesh and Assam while improving trade, transportation and overall infrastructure in the region.

Rail Connectivity Expansion

To enhance rail connectivity in the Northeast and integrate it with the rest of India, 18 railway infrastructure projects (13 new lines and 5 doubling projects) covering 1,368 km with an investment of ₹74,972 crore are in various stages of execution, with 313 km already commissioned as of March 2024.

- **Gauge Conversion Projects**

The conversion of meter-gauge to broad-gauge has been completed on several key routes, including the Lumding-Silchar line, essential for connecting Assam with its southern districts and Tripura.

- **Jiribam-Imphal Railway Line**

Aims to link Manipur’s capital, Imphal, with the rest of India, transforming the state’s economic landscape.

- **Agartala-Akhaura Rail Link**

Connecting Agartala, Tripura, with Akhaura in Bangladesh, this project strengthens international trade and reduces travel distance between the Northeast and Kolkata via Bangladesh.

Air Connectivity

Northeast India has witnessed significant air connectivity expansion, with the number of operational airports increasing from 9 in 2013 to 17 by 2023, leading to a 113% rise in traffic movement over the past decade. Under the UDAN scheme, 194 fixed-wing and helicopter routes have been awarded, boosting tourism, investment and ease of doing business in the region.

- **Donyi Polo Airport**

In November 2022, Arunachal Pradesh inaugurated its first Greenfield airport at Hollongi, Itanagar, connecting the state capital to major cities like Mumbai, Delhi, Kolkata and Guwahati.

- **Operational Advanced Landing Grounds (ALGs)**

Seven Advanced Landing Grounds (ALGs), including those at Ziro and Pasighat, are operational for civil flights, with Mechuka, Tuting and Walong prepared for commercial aviation, further enhancing regional air accessibility.

Inland Waterways Transport (IWT) Terminal

A state-of-the-art IWT terminal has been inaugurated at Jogighopa, Assam. Connected to the Multi-Modal Logistics Park, this terminal is strategically located to serve as an international port of call for Bhutan and Bangladesh, enhancing logistics and cargo movement in Assam and the Northeast. Also, development of National Waterway-2 (Brahmaputra) and National Waterway-16 (Barak River) aims to reduce logistics costs for industries in the region.

Urban and Industrial Growth

- **Semiconductor Manufacturing Plant**

A semiconductor manufacturing plant is being established in Jagiroad, near Guwahati, Assam, in collaboration with the Tata Group, positioning the region as a hub for electronics manufacturing.

- **Multi-Modal Logistics Park (MMLP)**

India's first MMLP is under construction at Jogighopa, Assam, set to transform logistics, warehousing and cargo movement, positioning Assam as a logistics hub for the Northeast.



The Logistics Ease Across Different States (LEADS) 2024 report

Shri Piyush Goyal unveils 'Logistics Ease Across Different States (LEADS) 2024' Report for better logistics planning to attract investments, advocates for Green Logistics initiative to drive sustainable growth and leverage public-private partnerships for success of multi-modal hubs. In the North-Eastern Group, Assam and Arunachal Pradesh were recognized as 'Achievers', reflecting their robust logistics frameworks. Meghalaya, Mizoram, Nagaland, Sikkim and Tripura were categorized as 'Fast Movers', indicating significant progress in enhancing their logistics ecosystems. Manipur was listed among the 'Aspirers', suggesting ongoing efforts to improve its logistics performance. The LEADS 2024 report serves as a strategic tool, offering insights to further refine their logistics capabilities and foster economic growth in the region

Cross-Border Trade and Connectivity

Bhutan's Gelephu Special Administrative Region is being developed as a regional logistics and trade hub, integrating with Assam's infrastructure to boost economic and cross-border trade. The city is developing an international airport to enhance air cargo and passenger connectivity, alongside green energy-powered logistics hubs, blockchain-backed trade systems and eco-friendly industrial zones. Focused on finance, agri-tech, green energy and high-tech innovation, GMC aligns with Northeast India's logistics and industrial growth, positioning the region as a key trade corridor in South Asia.

Leading Companies

Numaligarh Refinery Limited (NRL)

Numaligarh Refinery Limited is expanding its Assam refinery capacity from 60,000 to 180,000 barrels per day by March 2027. A crude oil pipeline to Paradip Port is set for commissioning by December 2025.

Tata Group

Tata Group's semiconductor manufacturing plant and the proposed Ratan Tata Electronic City in Jagiroad will position Assam as a hub for electronics and semiconductor manufacturing.

JSW Infrastructure

JSW Group chairman Sajjan Jindal announced plans to invest in Assam's cement manufacturing, renewable and thermal power sectors.

Container Corporation of India (CONCOR)

Container Corporation of India is expanding rail-linked cargo terminals and multimodal logistics parks in Assam to enhance freight efficiency and connectivity in Northeast India.



Policy/Schemes Support

- Uttar Poorva Transformative Industrialization Scheme (UNNATI), 2024**
Launched on March 9, 2024, UNNATI is a central sector scheme aimed at developing industries and generating employment in the Northeast.
- North East Special Infrastructure Development Scheme (NESIDS)**
A central sector scheme focused on enhancing infrastructure related to water supply, power, connectivity and projects promoting tourism in the region. The Ministry of Development of North Eastern Region (MDoNER) has sanctioned 90 projects costing ₹3,417.68 crore under NESIDS during the last three financial years from 2021-22 to 2023-24 and in the current financial year 2024-25.
- Prime Minister's Development Initiative for North East Region (PM-DevINE)**
This initiative aims to fund infrastructure and social development projects in the Northeast, addressing development gaps and promoting livelihood activities for youth and women.
- PM Gati Shakti National Master Plan**
A transformative initiative aimed at strengthening multi-modal logistics and seamless freight corridors in Northeast India. The plan integrates road, rail, air and waterways infrastructure to enhance connectivity, reduce transit times and lower logistics costs. It ensures coordinated development across ministries and states, facilitating efficient goods movement and boosting industrial and trade growth in the region.
- Bharatmala Pariyojana**
A flagship infrastructure program focused on expanding highway corridors to improve logistics networks and economic connectivity in Northeast India. The initiative includes the development of economic corridors, border roads, expressways and ring roads, enhancing inter-state and cross-border trade. The project is expected to reduce freight costs, improve supply chain efficiency and facilitate seamless movement of goods across Northeast India and neighbouring countries.
- Special Accelerated Road Development Programme for North Eastern Region (SARDP-NE)**
Implemented by NHIDCL, this program is expanding and upgrading National Highways and state roads in Northeast India. Phase-A covers 4,099 km of road construction, while Phase-B includes 3,723 km of road development, facilitating better interstate and cross-border trade connectivity.

These initiatives and projects underscore the government's commitment to transforming the infrastructure landscape of Northeast India, unlocking its potential as a significant contributor to the nation's economic growth.

Investment Opportunities in the Infrastructure and Logistics Sector in North East (Investible Projects)

The Northeast (NE) region of India enjoys strategic proximity to key markets in **ASEAN (Association of Southeast Asian Nations)** and **BBIN (Bangladesh, Bhutan, India, Nepal)** countries, making it a vital trade and connectivity hub.

Key Advantages of NE's Proximity to ASEAN & BBIN Markets

- Geographical Advantage**
 - Shares over 5,300 km of international borders with Bhutan, Bangladesh, Myanmar, Nepal and China.
 - Acts as India's gateway to Southeast Asia under the Act East Policy.
- Trade & Economic Corridors**
 - India-Myanmar-Thailand Trilateral Highway enhances connectivity to ASEAN.
 - Kaladan Multi-Modal Transit Transport Project links NE to Myanmar's Sittwe port.
 - BBIN Motor Vehicle Agreement boosts regional trade and transport.
- Market Access & Export Potential**
 - Demand for agriculture, handicrafts and processed food in ASEAN & BBIN.
 - NE's tea, organic produce and handicrafts have strong export potential.
 - Special Economic Zones (SEZs) and border haats facilitate trade.
- Infrastructure & Connectivity**
 - Integrated Check Posts (ICPs) at key border points (e.g., Moreh, Agartala).
 - Enhanced air and rail connectivity to neighbouring countries.
 - Upcoming Trans-Asian Railway to boost logistics efficiency.

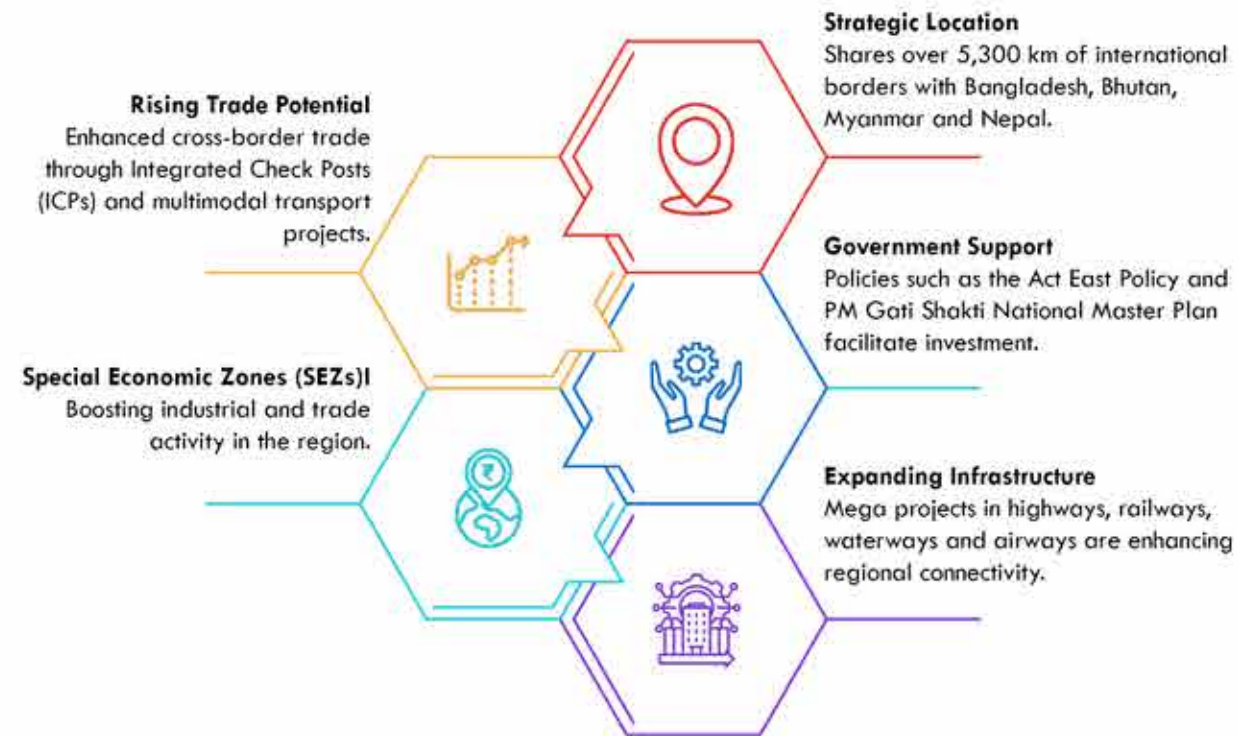


Investment Opportunities in the Infrastructure and Logistics Sector in North East (Investible Projects)

Introduction

Northeast India, strategically located as India's gateway to ASEAN and BBIN countries, is poised for significant growth in infrastructure and logistics. The region's proximity to international trade routes, rich natural resources and improving connectivity present lucrative investment opportunities for domestic and global investors.

Why Invest in Northeast India?



Key Investment Opportunities

Road and Highway Development

● Investible Projects:

- Expansion and upgradation of National Highways (NH) and State Highways.
- Bharatmala Pariyojana: Major highway expansion program in NE.
- Construction of border roads to improve cross-border trade.

Rail Connectivity and Logistics Hubs

● Investible Projects:

- Doubling and electrification of railway lines to enhance connectivity.
- Development of Multimodal Logistics Parks (MMLPs) in Assam, Tripura and Manipur.
- Freight corridors to integrate with Trans-Asian Railway.



Inland Waterways and Ports

● Investible Projects:

- Development of National Waterways for cargo transport.
- Investment in river ports, terminals and cargo handling facilities.
- Collaboration with Bangladesh for port access

Air Connectivity and Airport Infrastructure

● Investible Projects:

- Expansion of existing airports into international hubs.
- Greenfield airport projects
- Development of air cargo terminals for agri-exports and trade facilitation.

Border Trade and SEZs

Investible Projects:

- Development of Integrated Check Posts (ICPs)
- Establishment of Special Economic Zones (SEZs) for manufacturing and exports.
- Warehousing and cold chain logistics near border trade points.

Smart Cities and Urban Infrastructure

Investible Projects:

- Development of Smart Cities
- Investment in urban transport, metro and mass transit systems.
- Public-private partnerships (PPP) in urban infrastructure development.





MINISTRY OF DEVELOPMENT
OF NORTH EASTERN REGION

The logo for the Rising Northeast Investors Summit 2025 features a stylized map of the Northeast region of India, set against a circular background with a sunburst effect. The text "RISING NORTHEAST" is written in a large, bold, sans-serif font with a color gradient from purple to yellow. Below it, the text "INVESTORS SUMMIT 2025" is written in a smaller, blue, sans-serif font.

RISING NORTHEAST

INVESTORS SUMMIT 2025

Investment Facilitation Partner



Industry Partner

