

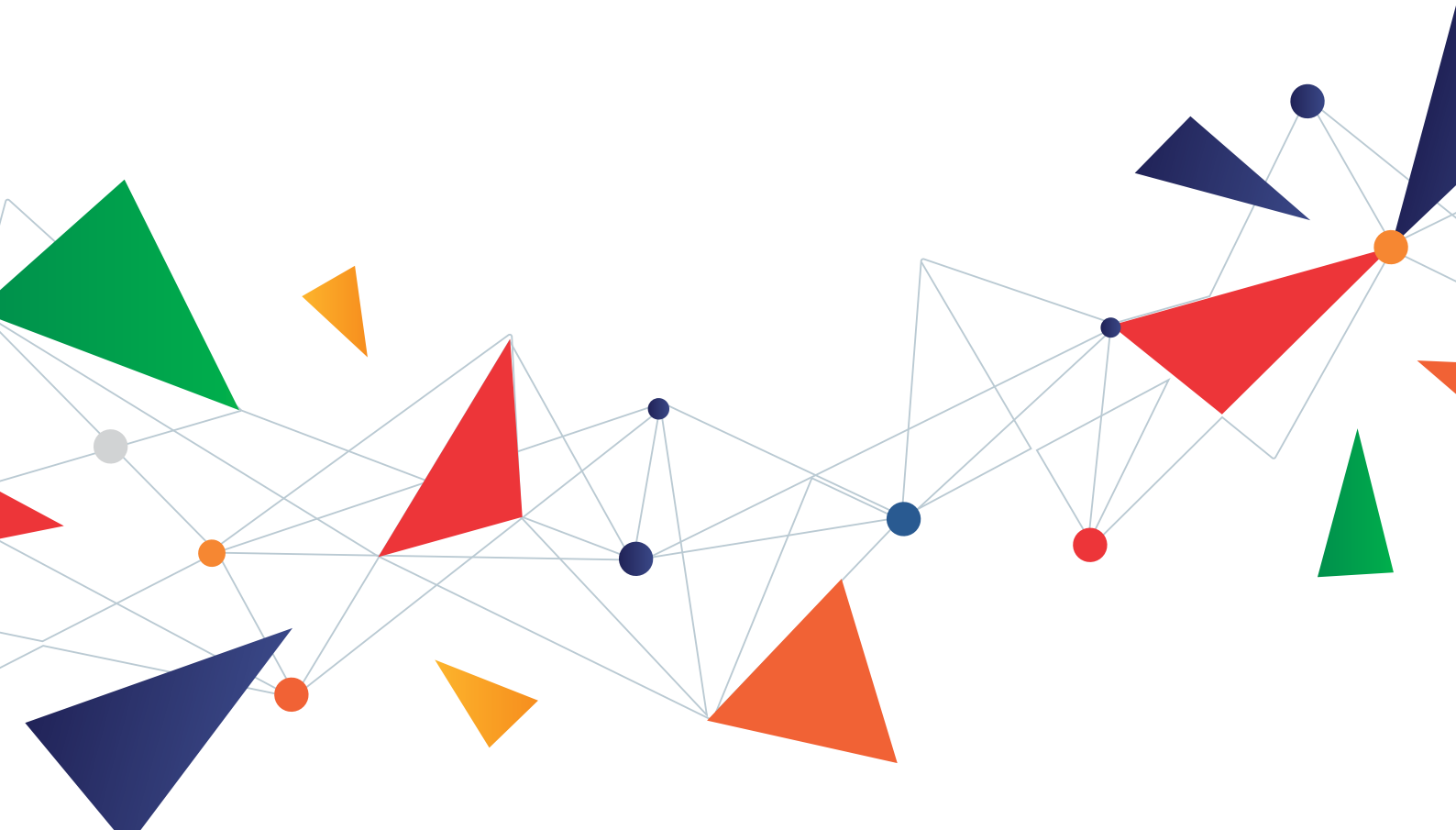


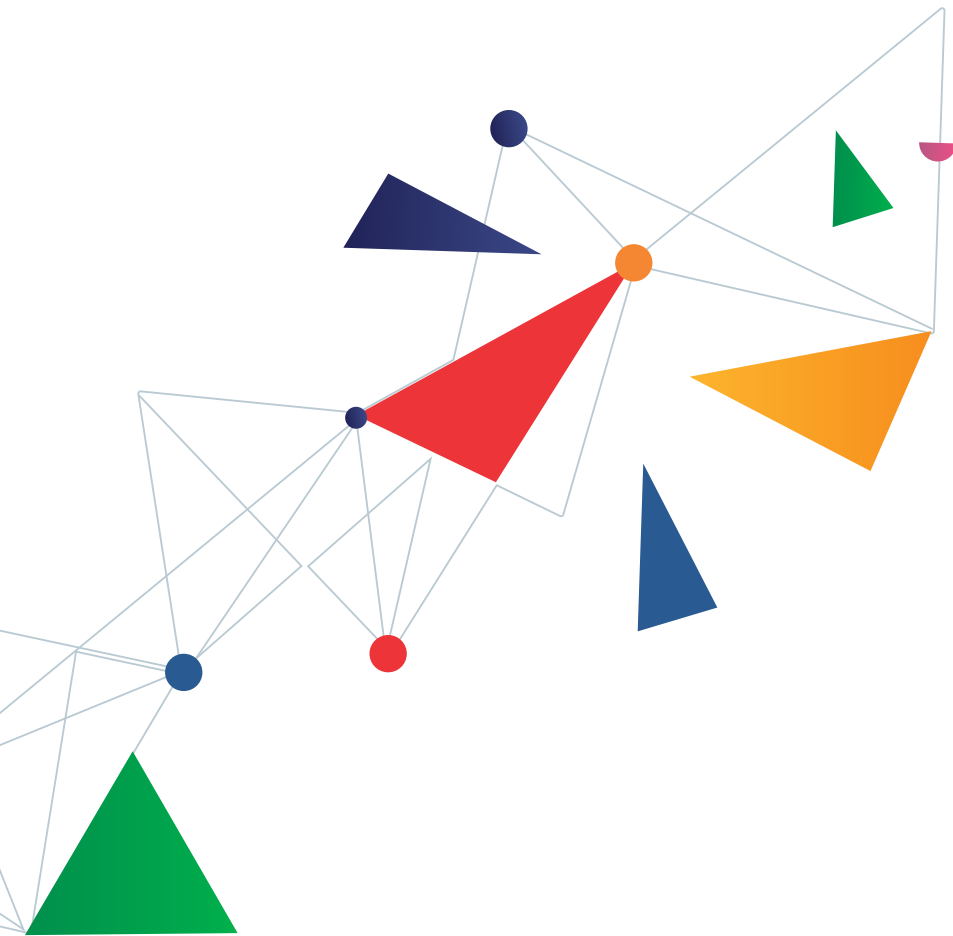
Confederation of Indian Industry

INDIAN ROOTS, AMERICAN SOIL

A Survey of Indian Industry's Business
Footprint in the United States

7th Edition, 2023





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Introduction

The years between the sixth and seventh editions of this flagship publication were marked by economic extremes; because of the COVID-19 pandemic, US GDP fell by 8.9 percent in the second quarter of 2020 - the largest single-quarter contraction since the Great Depression. US economic recovery has been slow but steady, reaching 2.7 percent in 2022.¹ India also faced the sharpest GDP drop in the nation's history during the pandemic, with an overall rate of contraction of 7.3 percent for the 2020/2021 fiscal year.² However, India's consistent economic recovery and resilient, inclusive growth has outpaced the rest of the world, reaching 6.9 percent³ in 2022.

Since taking office in 2021, US President Joseph Biden with Indian Prime Minister Narendra Modi has prioritized strengthening the US-India Comprehensive Global Strategic Partnership to accelerate US economic recovery and strengthen the US' presence in the Indo-Pacific region. His administration has revived many initiatives to enhance trade and investment ties like the Trade Policy Forum (TPF) and the revamped the US-India Strategic Clean Energy Partnership, and also launched several critical platforms for increased collaboration including the US - India initiative on Critical and Emerging Technology (iCET) and the Indo-Pacific Economic Framework for Prosperity (IPEF). The latest meeting of the India-US CEO Forum was a testament to their commitment to strengthen bilateral economic ties.

India - US supply chains proved their value and resiliency during the pandemic disruptions, as trade between the two countries not only survived the global economic downturn, but reached new heights and has continued to expand. India - US trade reached \$191 billion in 2022⁴, and India jumped three

places to become the US' ninth largest trading partner in 2021.⁵ The US has remained India's top trading partner, with a trade deficit of \$45.5 billion in 2021.

The US is the third largest investor in India with a cumulative total of \$59.1 billion of foreign direct investment (FDI) cited by Invest India in 2022. The previous iteration of this report found that just 155 Indian companies were responsible for \$22 billion in tangible US investments by 2020, and with this seventh edition, it is clear that Indian investment and job creation in the US has continued to grow.

The seventh edition of the Indian Roots, American Soil survey report continues to document the narrative of Indian Industry's impact on communities throughout the US. Over 160 Indian companies throughout all 50 US states, the District of Columbia, and the territory of Puerto Rico, self-reported their investments and job creation data with CII, as well as details of their corporate social responsibility (CSR) programs and financing of US-based Research and Development (R&D) projects. In addition to highlighting their contributions in US markets, the surveyed companies also ranked their perceptions of states' business-friendly environments to progress policy efforts to enhance the India - US economic partnership.

Indian investments not only supported US communities throughout the worst of the pandemic downturn, they have continued to expand and ensure the competitiveness of US companies and local ecosystems during the recovery period that has followed. CII is proud to present the latest survey data illustrating Indian FDI's role in strengthening the bilateral India - US economic partnership.

¹ [https://www.bea.gov/data/gdp/gross-domestic-product#:~:text=Gross%20Domestic%20Product%2C%20Fourth%20Quarter%20and%20Year%202022%20\(Second%20Estimate\)&text=Real%20gross%20domestic%20product%20\(GDP,percent%20in%20the%20third%20quarter.](https://www.bea.gov/data/gdp/gross-domestic-product#:~:text=Gross%20Domestic%20Product%2C%20Fourth%20Quarter%20and%20Year%202022%20(Second%20Estimate)&text=Real%20gross%20domestic%20product%20(GDP,percent%20in%20the%20third%20quarter.)

² <https://www.economicsobservatory.com/how-has-covid-19-affected-indias-economy>

³ <https://www.worldbank.org/en/news/press-release/2022/12/05/india-better-positioned-to-navigate-global-headwinds-than-other-major-emerging-economies-new-world-bank-report>

⁴ <https://pib.gov.in/PressReleaseframePage.aspx?PRID=1905747#:~:text=2.,accelerated%20growth%20benefitting%20both%20countries>

⁵ <https://www.trade.gov/knowledge-product/exporting-india-market-overview>



Survey Results - Highlights


The Confederation of Indian Industry launches the **Indian Roots, American Soil** survey to highlight Indian companies with investments and operations in the US every two years to measure and track the reach and impact of Indian FDI on various aspects and levels of the US economy.

This seventh edition of the survey report compiles the responses to the CII questionnaire as self-reported by over 160 Indian companies across a wide spectrum of sectors and geographies. Each year, the survey responses dig deeper into the bilateral partnership, and CII analyzes each companies' quantitative inputs in aggregate in order to calculate state-by-state tangible FDI and job creation numbers as well as CSR and R&D expenditures. From a qualitative perspective, this year's survey not only included questions regarding future investment and hiring plans, evaluation of favourable business climates, etc., it asked companies to share the impact of the COVID-19 pandemic on their US operations.

Indian Roots, American Soil continues to be the most holistic, conclusive tool available to evaluate Indian Industry's growth across the US. By comparing companies' responses by state, the report showcases the successes of economic development organizations and US companies across the nation to attract investments and partnerships. It also illustrates the strength of Indian companies within legislative constituencies, and serves as a guide for interested Indian companies to learn about the US' diverse regional economies. Once again, this flagship report continues the narrative of Indian Industry's expansion across the US, and traces the impact of their investments in both the US economy and its people.


Results Highlights

163 
Indian Companies in the United States
Responded to the Survey

Total Investment
Over **\$40 billion** (\$40,310,299,959) 

Total Employees
425,960 

Total R&D Expenditure
Nearly **\$1 Billion** (\$985,393,743) 

Total Corporate Social Responsibility Expenditure
Nearly **\$195 Million** (\$193,437,982) 

Indian companies are spread across all 50 US states, as well as Washington, D.C., and Puerto Rico with tangible investments in 40 states and territories.

Top Five States with the Highest Concentration of Indian Companies

STATE	Count
New Jersey	46
Texas	33
New York & California	32
Georgia & Illinois	22
Michigan	20

Top Five States Receiving the Most Indian FDI

STATE	Amount
Texas	9,773,276,398
Georgia	7,473,378,329
New Jersey	4,167,991,279
New York	2,129,112,112
Massachusetts	1,401,394,706

Top Five States with the Most Jobs Created by Indian Companies

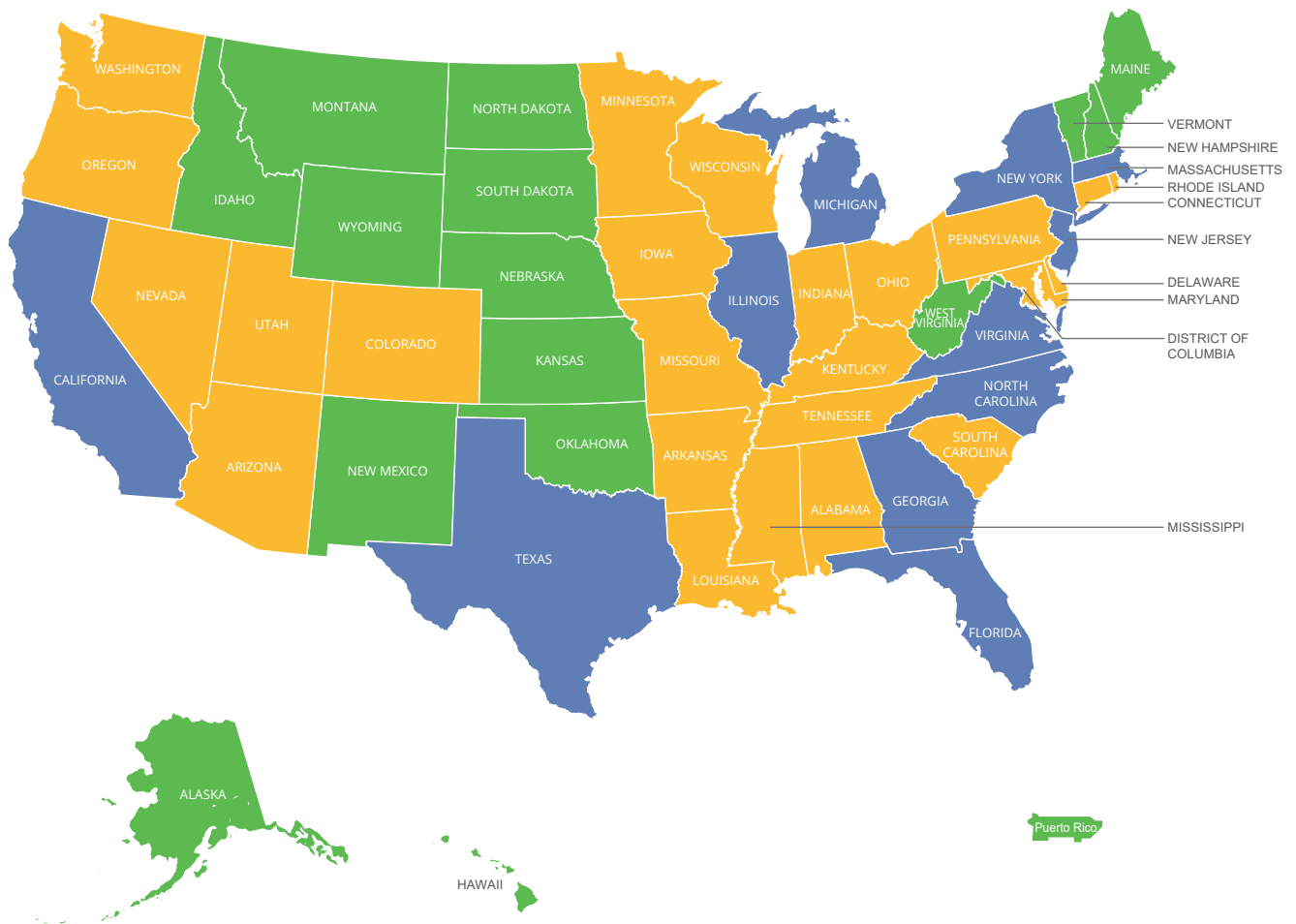
STATE	Count
Texas	20,906
New York	19,162
New Jersey	17,713
Washington	14,525
Florida & California	14,418 / 14,334

Indian Companies in the United States: Geographical Presence

Indian companies are spread across all 50 US states, as well as Washington, D.C., and Puerto Rico with tangible investments in 40 states and territories.

■ Over 15 companies ■ Between 5-15 Companies ■ Less than 5 Companies

Figure 1: Geographical Presence of Indian Companies in the United States

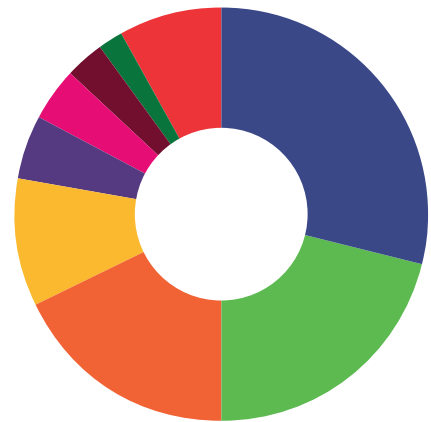


Indian Companies in the United States: Sector Diversification

Indian companies continue to diversify their sectors of operations across the US. This year's survey, for the first time, indicates a greater number of Indian companies in the life sciences, pharmaceuticals and healthcare sector climb over all other sectors, including the technology sector. The Information and Communication technology and Telecommunications sector continues to retain its might with the largest volume of investment and by far, the largest share of the job creation as well. The number of companies in the manufacturing and automotive sectors is on the rise. The services sector includes financial, legal, logistics, design and engineering services, which is rising in proportion. Other sectors include tourism and hospitality, energy, sustainability, mining, materials and allied services.

Figure 2: Indian Companies in the United States: Sector Diversification

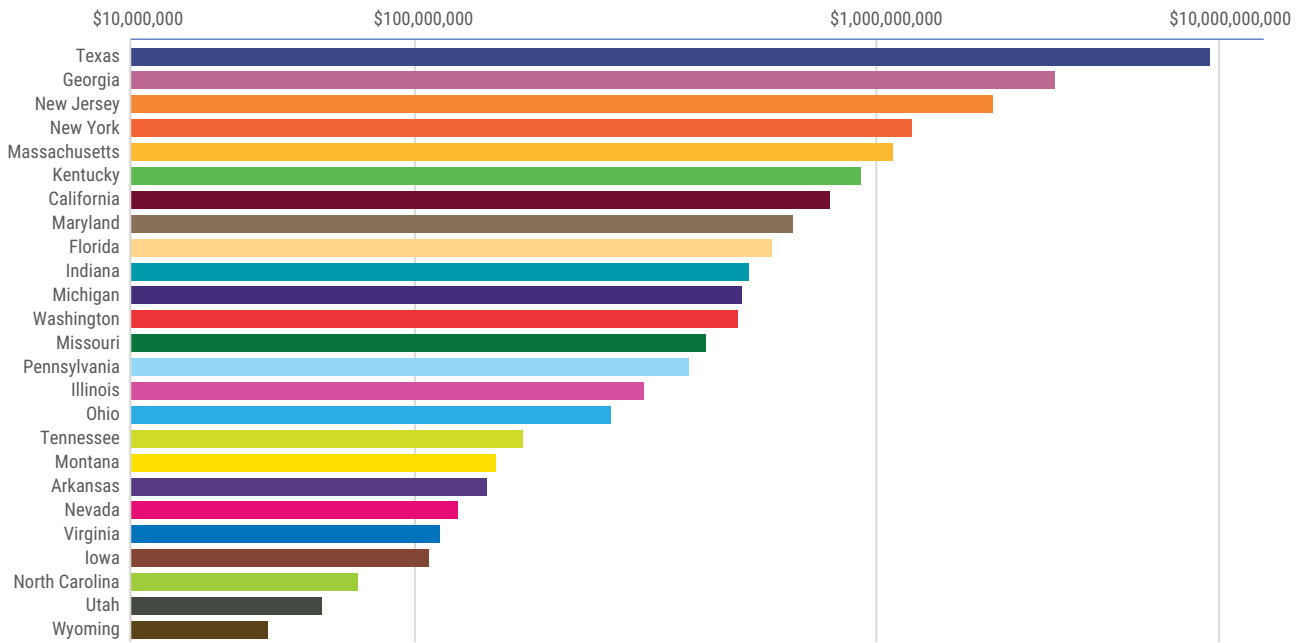
● Life Sciences, Pharmaceuticals and Healthcare	29%
● Information Technology and Telecommunications	21%
● Manufacturing	18%
● Services - Financial, Legal, Logistics, Design	10%
● Automotive	5%
● Food and Agriculture	4%
● Tourism and Hospitality	3%
● Energy	2%
● Other	8%



Indian Companies in the United States: Tangible Investments

The survey found that Indian companies in the US have made over \$40 billion in tangible investments, with 23 states listed investments of over \$100 million. The top ten states with the most reported FDI from Indian companies were Texas (\$9.8 billion), Georgia (\$7.5 billion), New Jersey (\$4.2 billion), New York (\$2.1 billion), Massachusetts (\$1.4 billion), Kentucky (\$908 million), California (\$776 million), Maryland (\$720 million), Florida (\$711 million) and Indiana (582 million).

Figure 3: Indian Companies in the United States: Top Tangible Investments



■ Texas	\$9,773,276,398	■ Pennsylvania	\$481,785,667
■ Georgia	\$7,473,378,329	■ Illinois	\$396,539,171
■ New Jersey	\$4,167,991,279	■ Ohio	\$291,392,112
■ New York	\$2,129,112,112	■ Tennessee	\$269,101,826
■ Massachusetts	\$1,401,394,706	■ Montana	\$240,597,826
■ Kentucky	\$908,453,496	■ Arkansas	\$176,563,413
■ California	\$775,712,744	■ Nevada	\$150,597,826
■ Maryland	\$720,186,119	■ Virginia	\$128,069,200
■ Florida	\$710,875,025	■ Iowa	\$102,917,826
■ Indiana	\$582,397,826	■ North Carolina	\$91,717,826
■ Michigan	\$573,158,003	■ Utah	\$86,497,826
■ Washington	\$511,012,112	■ Wyoming	\$85,900,000
■ Missouri	\$500,597,826		



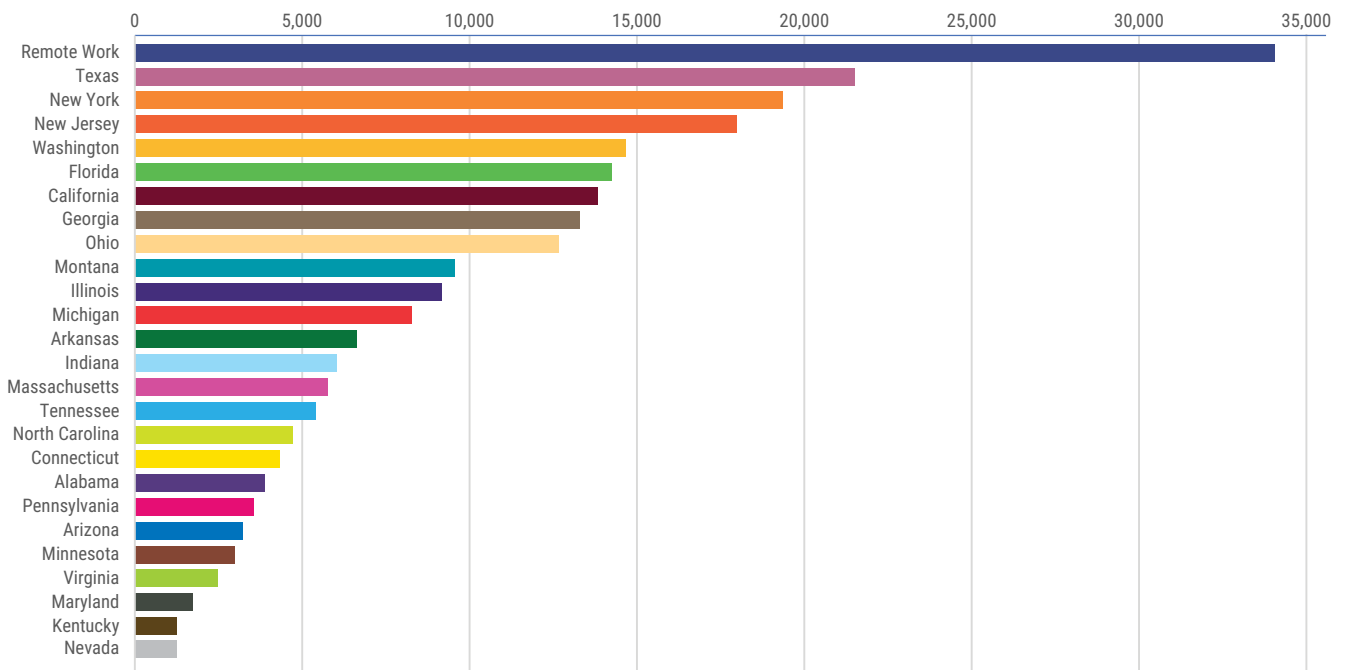
Indian Companies in the United States: Job Creation

Indian companies reported a collective sum of over 425,000 created jobs across the US in the survey. The reported jobs spanned all 50 states, as well as the District of Columbia and Puerto Rico, and reflects only direct hires. The multiplier effect to which these positions may create additional employment within supporting industries through their backward and forward linkages unlocks a far greater economic impact.

The impact of the COVID-19 pandemic is reflected in the employment section of the survey in several ways - one, the number of employees attributed to each state is lesser than previous reporting, for those who watch this survey closely. Two, this is perhaps explained by a new category of job location: "remote work", which for the first time, claims the top spot for employment.

The top ten states benefitting from jobs created by Indian companies are Texas (20,906 jobs), New York (19,162 jobs), New Jersey (17,713 jobs), Washington (14,525 jobs), Florida (14,418 jobs), California (14,334 jobs), Georgia (13,945 jobs), Ohio (12,188 jobs), Montana (9,603 jobs), Illinois (8,454 jobs).

Figure 4: Indian Companies in the United States: Top Job Creation



Remote Work	34,294	Indiana	6,188
Texas	20,906	Massachusetts	5,920
New York	19,162	Tennessee	5,328
New Jersey	17,713	North Carolina	4,576
Washington	14,525	Connecticut	2,052
Florida	14,418	Alabama	1,942
California	14,334	Pennsylvania	1,842
Georgia	13,945	Arizona	1,389
Ohio	12,188	Minnesota	1,080
Montana	9,603	Virginia	1,021
Illinois	8,454	Maryland	1,008
Michigan	7,740	Kentucky	935
Arkansas	6,311	Nevada	839

Indian Companies in the United States: Research & Development

55% of the 157 companies who responded to this section of the survey, reported funding research and development (R&D) in the US, amounting to nearly \$1 billion invested by Indian companies in US innovation initiatives.

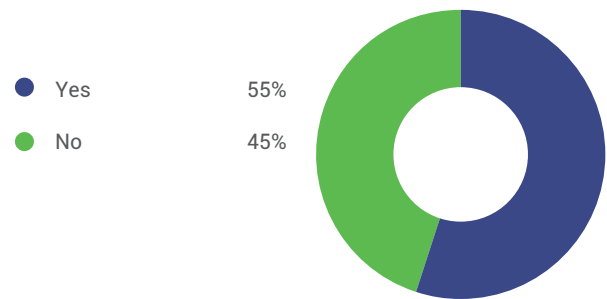
Indian companies have built R&D partnerships with clients, universities, research labs in order to accelerate innovation, meet current and future customer requirements, improve products and reduce conversion costs.

For instance, several life sciences companies are developing new pharmaceutical platforms in topicals and oral solids; others are engaged in pharmaceuticals and formulation development such as for women's health, respiratory and inhalation generic products.

A renowned packaging manufacturing company has been focused on innovative and sustainable packaging and has received prestigious certifications and patents towards their R&D, while automotive manufacturing companies have R&D partnerships to support advanced driver-assistance systems development as well as to design and develop innovative, appealing, and affordable electric vehicles.

Software companies are building new gamification and simulations for learning platforms and several high-tech centers are focused on developing niche capabilities in new and emerging technologies, cybersecurity, 5G certifications.

Figure 5: Indian Companies in the United States: Percentage of Surveyed Companies Conducting R&D



Indian Companies in the United States: Corporate Social Responsibility and Community Engagement

This year's survey found that Indian companies are continuing to plant roots and invest in the local US communities where they operate, in addition to leveraging commercial opportunities. Respondents to the 2022 survey reported investing nearly \$195 million in corporate social responsibility initiatives.

Indian companies are creating their CSR programs, based on the needs in their communities. This includes initiatives focused on providing developmental needs in education, healthcare, the environment, and disaster rehabilitation.

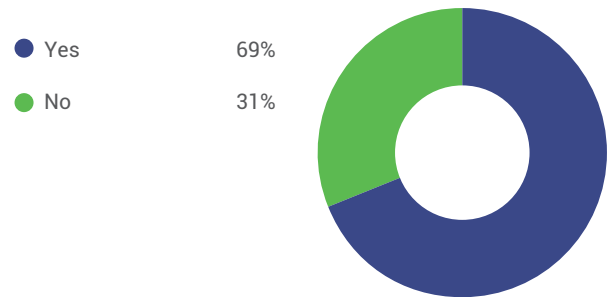
Popular programs among tech companies include STEM training for students and teachers, including multi-million dollar grants given to universities to institute STEM fellowships.

Several companies contribute CSR funds to hunger-relief programs and cancer cure and other medical causes, as well as towards environmental sustainability initiatives and disaster relief. Some companies have also created volunteer-based initiatives to address community needs at the local level. Other companies donate to charities such as the Red Cross, and Salvation Army and some even undertake programs like Adopt-a-Highway or Adopt-a-School.

During the height of the pandemic, Indian Industry was recognized for donating millions of dollars' worth of medicines and pharmaceutical products for vaccine and treatment research, as well as pivoting their manufacturing facilities towards producing essentials and reinforcing critical supply chains that supported US communities in the most precarious of times. They also engaged in integrating virtual education and training platforms through educational institutions in efforts to continue to drive learning and social connection, especially among the youth.

Indian companies have planted roots in their adopted US communities and are dedicated to ensuring a prosperous future for their friends and neighbors.

Figure 6: Indian Companies in the United States: Percentage of Surveyed Companies Engaging in CSR Initiatives



Indian Companies in the United States: Future Plans

As the global economy recovers, business is expanding in the US and Indian Industry continues to seek new opportunities throughout the country. 85% of surveyed companies plan to hire additional local employees in the next five years, with 83% planning future US investments. 50% of survey participants also reported anticipating greater US-based R&D projects in their funding pipelines.

Figure 7: Indian Companies in the United States: Percentage of Surveyed Companies Planning Investments in the US in the Next Five Years

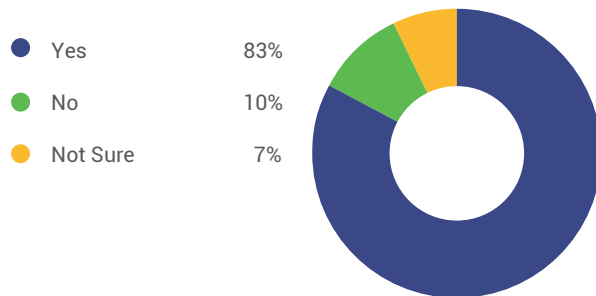


Figure 8: Indian Companies in the United States: Percentage of Surveyed Companies Planning to Hire Employees in the US in the Next Five Years

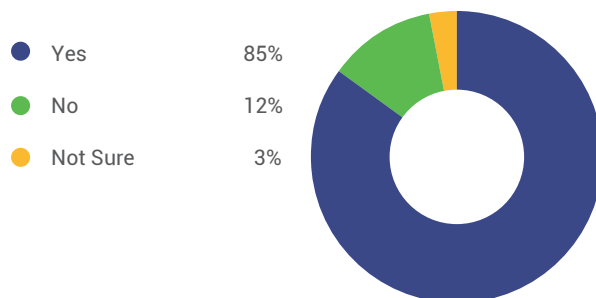
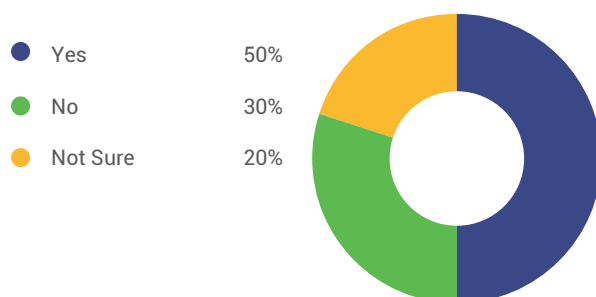


Figure 9: Indian Companies in the United States: Percentage of Surveyed Companies Planning to R&D Expenditure in the US in the Next Five Years



Top Business-friendly States

The companies were also asked to rank the business environments of US states in terms of friendliness towards attracting Indian FDI. Texas and New Jersey

were tied as the most-cited states for perceived best business climates, followed closely by Georgia, then New York, California, and Michigan.

COVID Impact

The survey also asked companies two open-ended questions about the impact of the COVID-19 Pandemic: (1) How did the Covid-19 Pandemic impact your business operations? (2) Were there any positive effects of the COVID-19 Pandemic?

Many companies reported no change or reduction in their workforce. In fact, several companies, with designated "essential" workers had to accelerate work, whether in manufacturing, R&D or services.

This is not to say the pandemic did not impact business. The pandemic impacted business operations in two significant ways – workforce reduction and supply chain disruption. Global supply chains were disrupted and our businesses faced shortage of raw material. At the same time, labor challenges exacerbated from the churn in workforce due to pandemic.

Some down-sizing was inevitable to align with customers who were impacted by the pandemic. For some, operations were severely affected and recovering to pre-COVID operational levels took nearly 12 months after the facilities were allowed to operate.

In addition, many companies had to assess de-risking their supply chains against vulnerabilities, including disruptions from the global semi-conductor shortages. Based on the material risk assessment, initiatives were implemented to initiate alternate vendor development programs or perform reassessment of inventory norms. Some companies increased their inventory from 3 months to 6 months supply to mitigate risk. Significant increase in raw material prices and freight costs drove up overall operational costs and meeting the increased demand with negative margins was challenging.

The hospitality industry suffered the brunt of the lockdowns and travel restrictions, with a prolonged recovery period.

However, out of all disruption, comes innovation. New business models, new products, new work-flow processes emerged for those made the pivot in an agile and nimble manner.

US and Indian pharmaceutical companies collaborated hand-in-glove on COVID-19 partnerships across the whole spectrum of the value chain- from vaccine and drug development, manufacture, marketing, logistics, delivery and inoculation implementation, records and impact studies. Some pharma companies were able to introduce a long-acting sanitizer in the early days of pandemic.

Migration to 'Work from Home' came smooth to those who enabled high level of digitization. Engagement technology adoption helped more interaction and collaboration, especially across time zones, without physical travel. 'Hybrid' models of remote and in-person working became the norm, and have found permanence in current business models too, allowing greater flexibility and productivity.

The pandemic essentially forced consumers to try or enhance e-commerce-based services, and to increasingly rely on peer ratings and reviews. Companies also turned their attention on ensuring how organizations can deeply connect with people in a virtual world and introduced new initiatives on mental health and women leadership as well as fun contests to keep teams connected.

The COVID-19 pandemic served as an accelerant in multiple ways. In the big picture, it increased the urgency for a new vision of global growth, one that benefits more people and leaves our planet healthy.

Survey Results

Top 25 States with the Largest Investments by Indian Companies



01

Texas



Total Volume of Investment

\$9,773,276,398

Employees

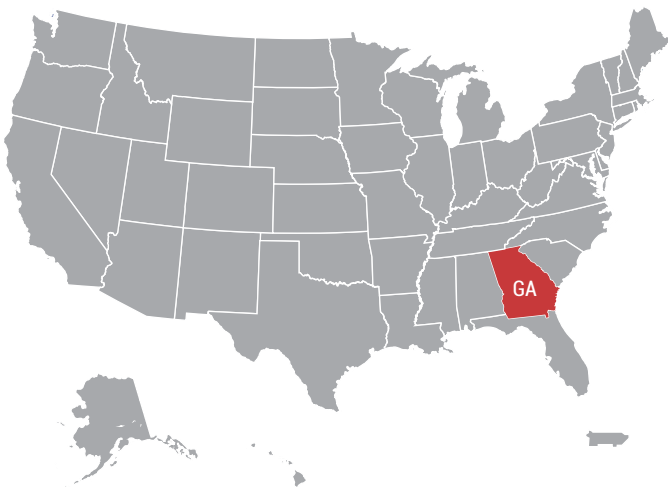
20,906

Subsidiaries

33

02

Georgia



Total Volume of Investment

\$7,473,378,329

Employees

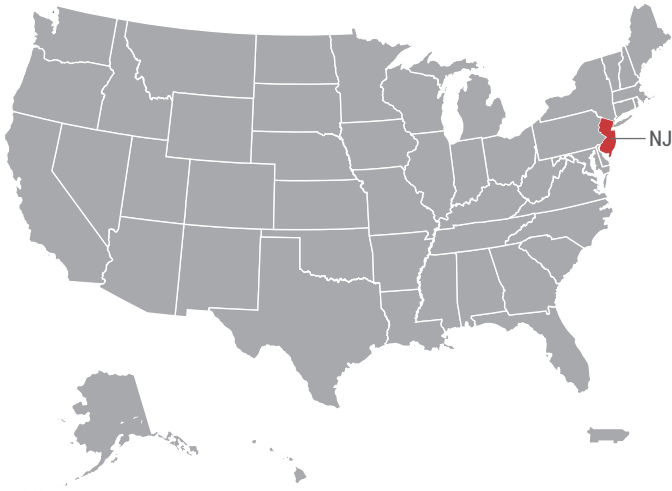
13,945

Subsidiaries

22

03

New Jersey



Total Volume of Investment

\$4,167,991,279

Employees

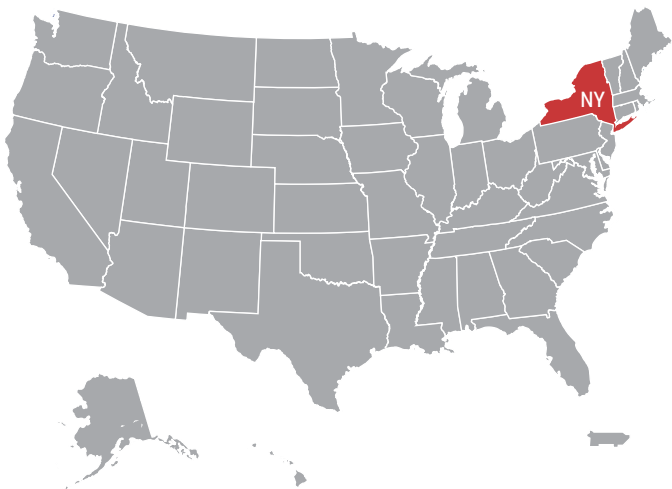
17,713

Subsidiaries

46

04

New York



Total Volume of Investment

\$2,129,112,112

Employees

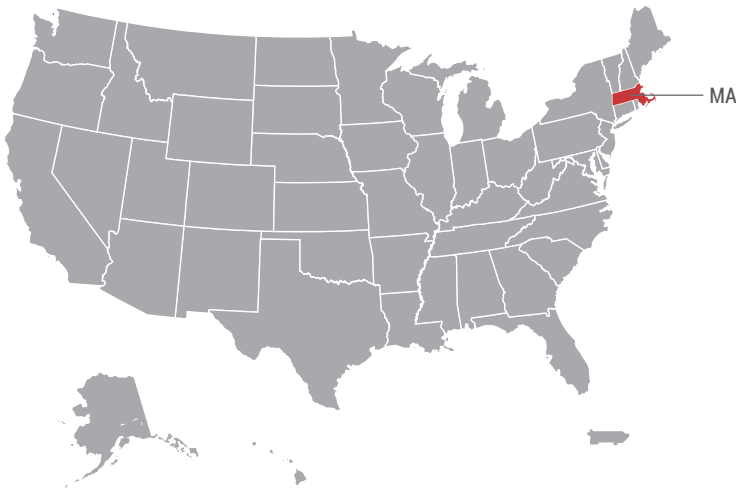
19,162

Subsidiaries

32

05

Massachusetts



Total Volume of Investment

\$1,401,394,706

Employees

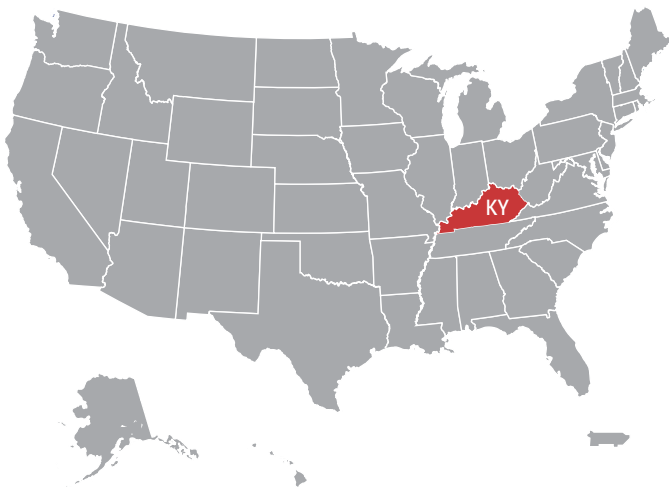
5,920

Subsidiaries

17

06

Kentucky



Total Volume of Investment

\$908,453,496

Employees

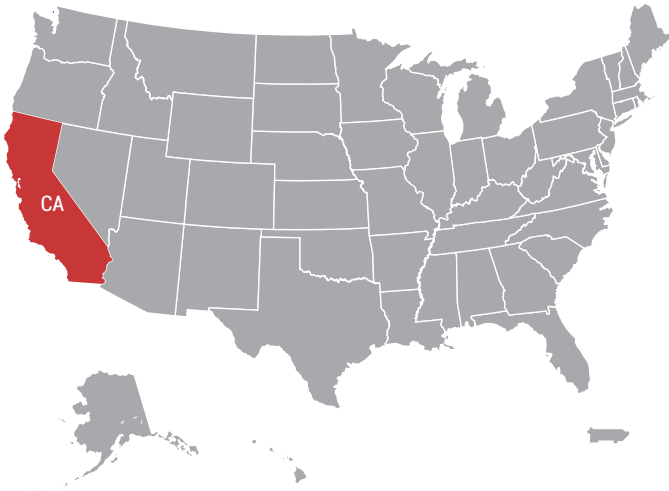
935

Subsidiaries

10

07

California



Total Volume of Investment

\$775,712,744

Employees

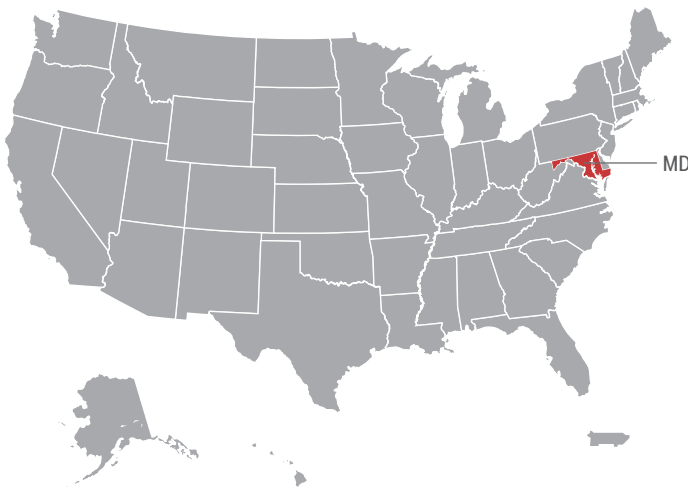
14,334

Subsidiaries

32

08

Maryland



Total Volume of Investment

\$720,186,119

Employees

1,008

Subsidiaries

14



09

Florida



Total Volume of Investment

\$710,875,025

Employees

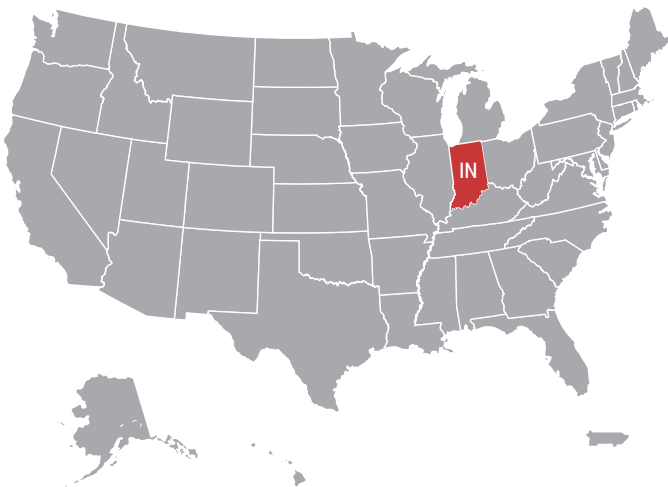
14,418

Subsidiaries

18

10

Indiana



Total Volume of Investment

\$582,397,826

Employees

6,188

Subsidiaries

9

11

Michigan



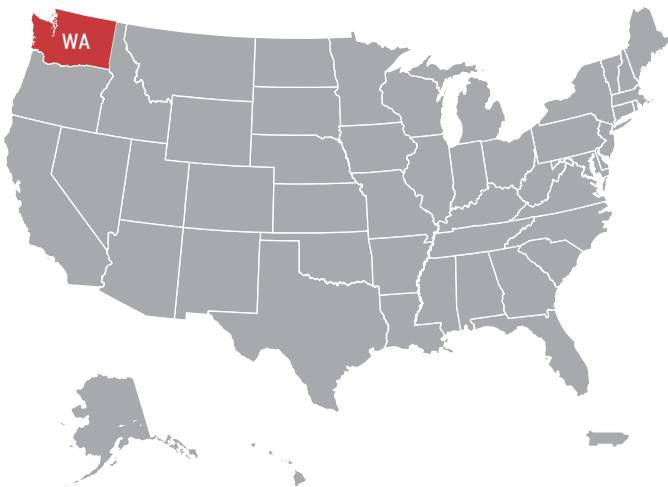
Total Volume of Investment
\$573,158,003

Employees
7,740

Subsidiaries
20

12

Washington



Total Volume of Investment
\$511,012,112

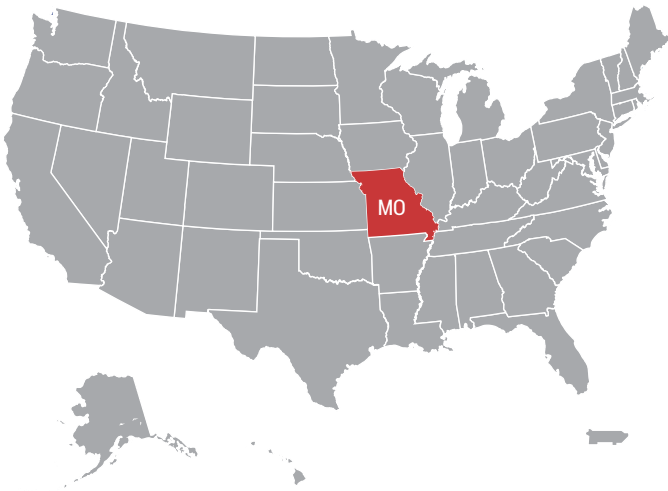
Employees
14,525

Subsidiaries
15



13

Missouri



Total Volume of Investment

\$500,597,826

Employees

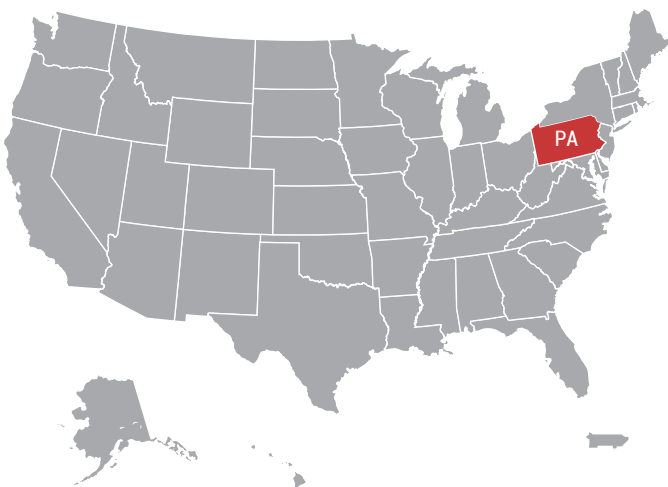
272

Subsidiaries

5

14

Pennsylvania



Total Volume of Investment

\$481,785,667

Employees

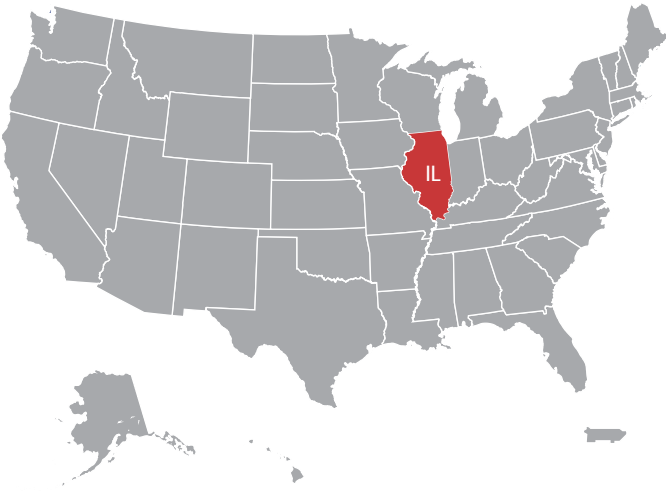
1,842

Subsidiaries

15

15

Illinois



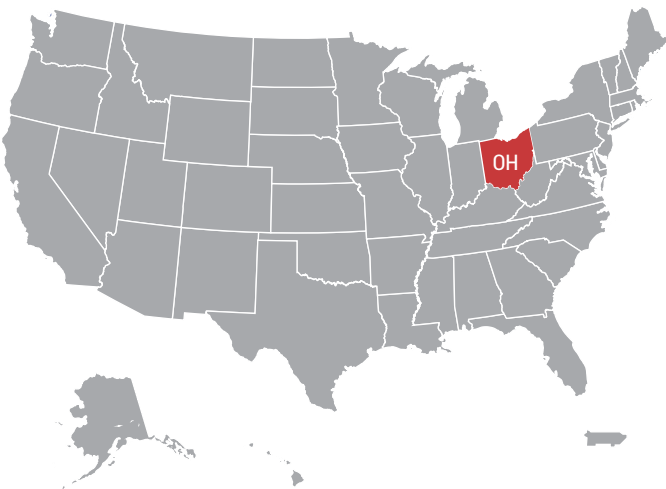
Total Volume of Investment
\$396,539,171

Employees
8,454

Subsidiaries
22

16

Ohio



Total Volume of Investment
\$291,392,112

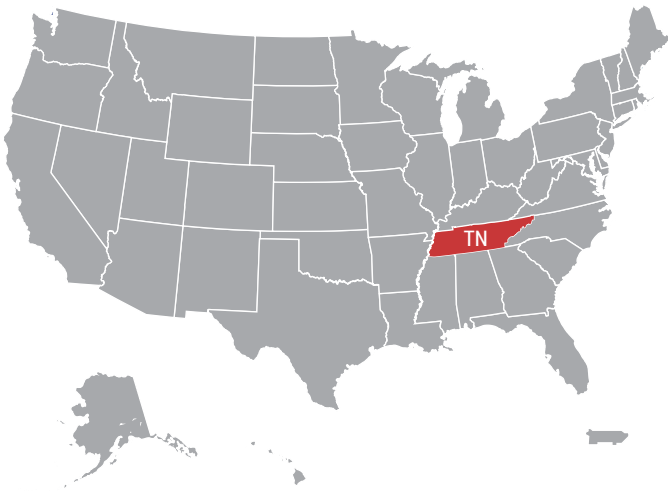
Employees
12,188

Subsidiaries
14



17

Tennessee



Total Volume of Investment

\$269,101,826

Employees

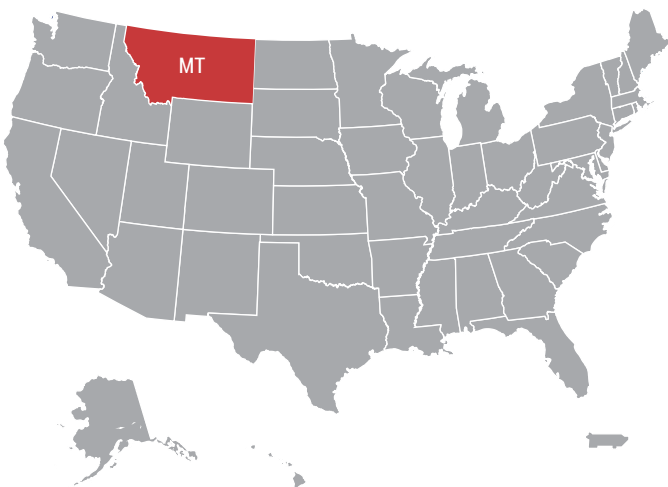
5,328

Subsidiaries

8

18

Montana



Total Volume of Investment

\$240,597,826

Employees

9,603

Subsidiaries

3

19

Arkansas



Total Volume of Investment

\$176,563,413

Employees

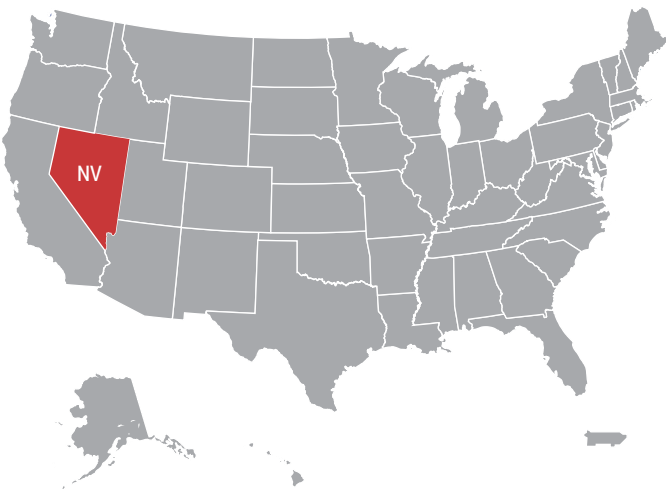
6,311

Subsidiaries

8

20

Nevada



Total Volume of Investment

\$150,597,826

Employees

839

Subsidiaries

6





21

Virginia



Total Volume of Investment

\$128,069,200

Employees

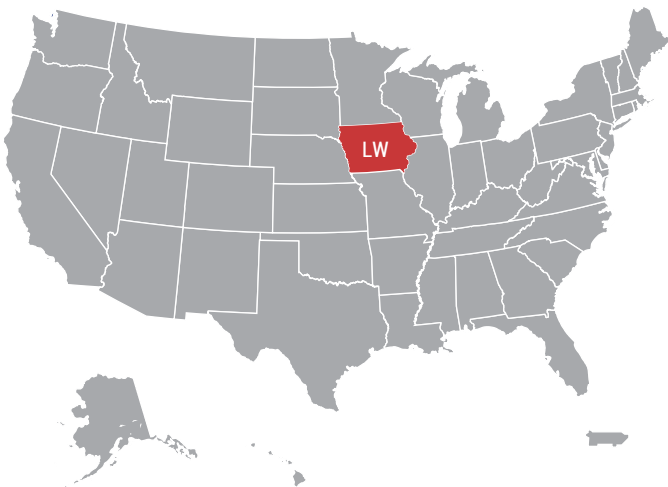
1,021

Subsidiaries

16

22

Iowa



Total Volume of Investment

\$102,917,826

Employees

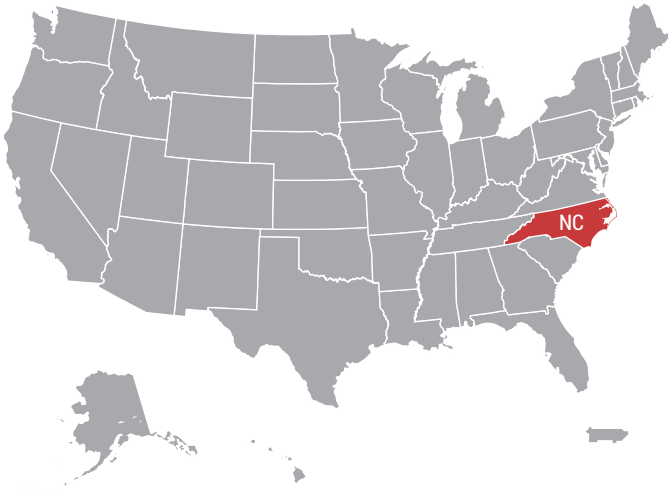
539

Subsidiaries

9

23

North Carolina



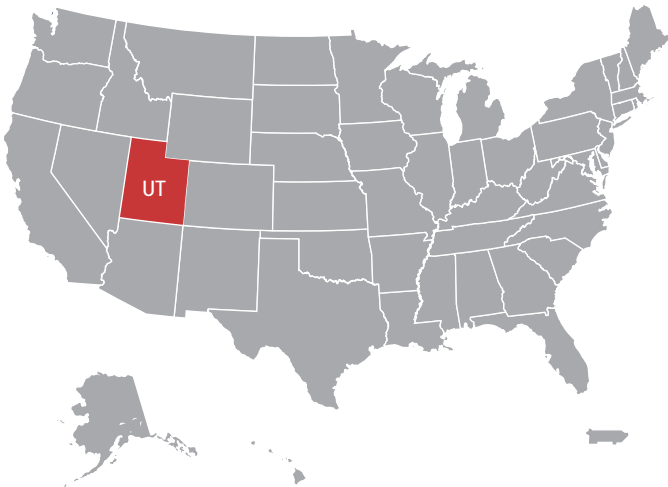
Total Volume of Investment
\$91,717,826

Employees
4,576

Subsidiaries
19

24

Utah



Total Volume of Investment
\$86,497,826

Employees
269

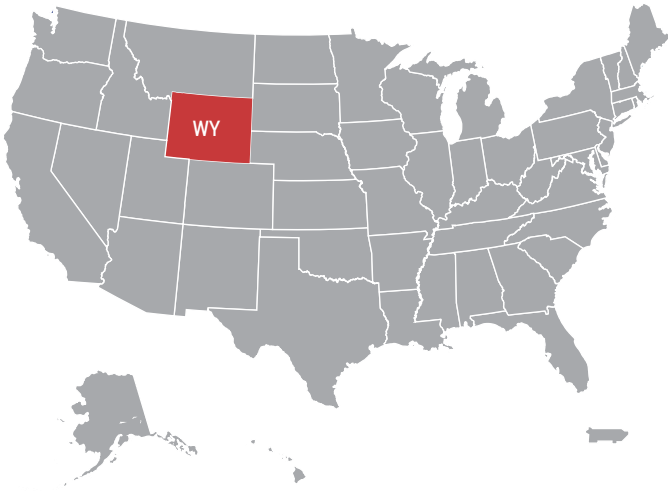
Subsidiaries
10





25

Wyoming



Total Volume of Investment
\$85,900,000

Employees
542

Subsidiaries
3

Conclusion

The seventh edition of CII's flagship ***Indian Roots, American Soil*** demonstrates that Indian Industry is not only committed to the prosperity of the US economy and its people, but by continuing to grow FDI and job creation, Indian companies are strengthening the resiliency of US markets and ensuring the promise of the India – US relationship as the defining partnership of the 21st century.

Indian Industry's increased engagement with the US through escalating investments, job creation, CSR and R&D bolsters local communities and enhances the competitiveness of the US workforce. The long-term commitments the various iterations of this report have tracked between Indian companies and their adopted

communities are very clear, as Indian Industry's support of local nonprofits, schools, and other capacity-building initiatives ensures both the efficacy of their investments and mutual success and prosperity.

The Indian Roots, American Soil survey report is a "snapshot in time," reflecting the compilation of 163 companies' self-reported data and does not attempt to present the full and comprehensive impact of Indian investments in the US. The footprint created by Indian companies in the US plays a critical role in the development and growth of the India – US bilateral partnership, and this report provides an exclusive resource to both the private sector and policy makers interested in cultivating deeper ties.



Notes

A series of horizontal dashed lines spanning the width of the page, intended for taking notes.





Confederation of Indian Industry

The Confederation of Indian Industry (CII) works to create and sustain an environment conducive to the development of India, partnering Industry, Government and civil society, through advisory and consultative processes.

CII is a non-government, not-for-profit, industry-led and industry-managed organization, with around 9000 members from the private as well as public sectors, including SMEs and MNCs, and an indirect membership of over 300,000 enterprises from 286 national and regional sectoral industry bodies.

For more than 125 years, CII has been engaged in shaping India's development journey and works proactively on transforming Indian Industry's engagement in national development. CII charts change by working closely with Government on policy issues, interfacing with thought leaders, and enhancing efficiency, competitiveness and business opportunities for industry through a range of specialized services and strategic global linkages. It also provides a platform for consensus-building and networking on key issues.

Extending its agenda beyond business, CII assists industry to identify and execute corporate citizenship programmes. Partnerships with civil society organizations carry forward corporate initiatives for integrated and inclusive development across diverse domains including affirmative action, livelihoods, diversity management, skill development, empowerment of women, and sustainable development, to name a few.

As India completes 75 years of Independence in 2022, it must position itself for global leadership with a long-term vision for India@100 in 2047. The role played by Indian industry will be central to the country's progress and success as a nation. CII, with the Theme for 2022-23 as Beyond India@75: Competitiveness, Growth, Sustainability, Internationalisation has prioritized 7 action points under these 4 sub-themes that will catalyze the journey of the country towards the vision of India@100.

With 62 offices, including 10 Centres of Excellence, in India, and 8 overseas offices in Australia, Egypt, Germany, Indonesia, Singapore, UAE, UK, and USA, as well as institutional partnerships with 350 counterpart organizations in 133 countries, CII serves as a reference point for Indian industry and the international business community.

Confederation of Indian Industry

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