



Confederation of Indian Industry
125 Years - Since 1895

INDIAN ROOTS, AMERICAN SOIL

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

Sixth Edition, 2020





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Introduction

The past two years encompassed in this biennial survey were monumental for the bilateral partnership of India and the United States. Two VVIP visits of Heads of State in quick succession with Prime Minister Modi visiting the US in September 2019, followed by President Trump's visit to India in February 2020 led to unprecedented levels of public engagement and India-US friendship in Houston, Texas, and Ahmedabad, Gujarat.

On the strategic front, the conclusion of two major foundational military agreements, the Logistics Exchange Memorandum of Agreement (LEMOA) and the Communications Compatibility and Security Agreement (COMCASA), strengthened the nations' cooperation, with the emphasis on data and technology sharing reckoning India's rise as an instrumental player in the Indo-Pacific international rules-based order. The categorization of India by the US as both a "Major Defense Partner" and a holder of "Strategic Trade Authorization – 1" (STA-1) further empowered the increasing convergence of interests and values between the two countries.

India-US trade peaked at \$142.6 billion in 2018, with a compound annual growth rate (CAGR) of 11.8%, even while a number of unresolved trade issues continue to be under G2G negotiation. In 2018 the bilateral goods trade totaled \$87.9 billion, while trade in services amounted to an estimated \$54.8 billion. Recently released bilateral goods trade data for 2019 indicates that the US has replaced China as India's top goods

trading partner, as well as that India has decreased its trade deficit to \$23.2 billion, and is no longer listed among the top ten countries with the largest trade deficits with the US. Beyond trade and commerce, investment ties between India and the US continue to fortify the bilateral economic partnership. The cumulative stock of US FDI in India was \$46 billion in 2018, while the previous edition of the Confederation of Indian Industry's *Indian Roots, American Soil* survey report found that just 100 Indian companies accounted for nearly \$18 billion of foreign direct investment (FDI) into the US.

The sixth edition of the *Indian Roots, American Soil* report continues to examine the contributions of Indian industry in the US via a survey of 155 responding companies spread throughout the 50 US states, as well as the District of Columbia and the territory of Puerto Rico. In addition to listing the top states for investments and job creation, this edition also denotes Indian industry's contributions to local communities through corporate social responsibility (CSR) programs, their financing of US-based Research and Development (R&D) projects, and their perceptions of states with the most business-friendly environments.

As Indian industry continues to invest in the US, CII is proud to present the latest survey data highlighting how FDI from India is transforming the bilateral partnership and enhancing the cooperation and competitiveness of both markets.

Survey Results

Every two years, the Confederation of Indian Industry surveys Indian companies with investments and operations across a wide spectrum of sectors throughout the US to determine the reach and impact of Indian FDI on the US economy.

The 2020 survey report compiles the responses of 155 Indian companies across the US to the questionnaire distributed by CII. The resulting aggregate was then tabulated state-by-state for tangible FDI and job creation numbers, CSR and R&D activities, as well as a forward-looking perspective of companies' investment plans in the US per their evaluation of favourable business environments. By comparing companies' responses by state, *Indian Roots, American Soil* reflects the most conclusive outlook available for economic development organizations seeking to increase investments from India, US companies looking to attract partners and investors, legislators to understand the strength of Indian companies in their constituencies, and for Indian companies interested in expanding into the US to learn about its regional ecosystems.

This sixth edition of the *Indian Roots, American Soil* survey report not only illustrates the continued success of several states in attracting Indian investment, it also helps create a narrative of Indian industry's growth across the US. With Indian companies continuing to invest in CSR and R&D throughout the US, this report quantitatively demonstrates how Indian companies are investing in both the US economy and its people.

Results Highlights

155 
Indian Companies in the United States
Responded to the Survey

Total Investment

\$22 billion



Total Employees

125,000



Total Research & Development Expenditure

\$900 million



Total Corporate Social Responsibility Expenditure

\$175 million



Indian companies are spread across all 50 US states, as well as Washington, D.C., and Puerto Rico with tangible investments in 42 states and territories.

Top Five States with the Highest Concentration of Indian Companies

STATE	Count
New Jersey & Texas	40
California	34
New York	30
Illinois	23
Georgia	22

Top Five States Receiving the Most Indian FDI

STATE	Amount
Texas	\$9,531,325,222
New Jersey	\$2,430,480,141
New York	\$1,789,770,000
Florida	\$915,038,581
Massachusetts	\$873,226,860

Top Five States with the Most Jobs Created by Indian Companies

STATE	Jobs
Texas	17,578
California	8,271
New Jersey	8,057
New York	6,175
Florida	5,454

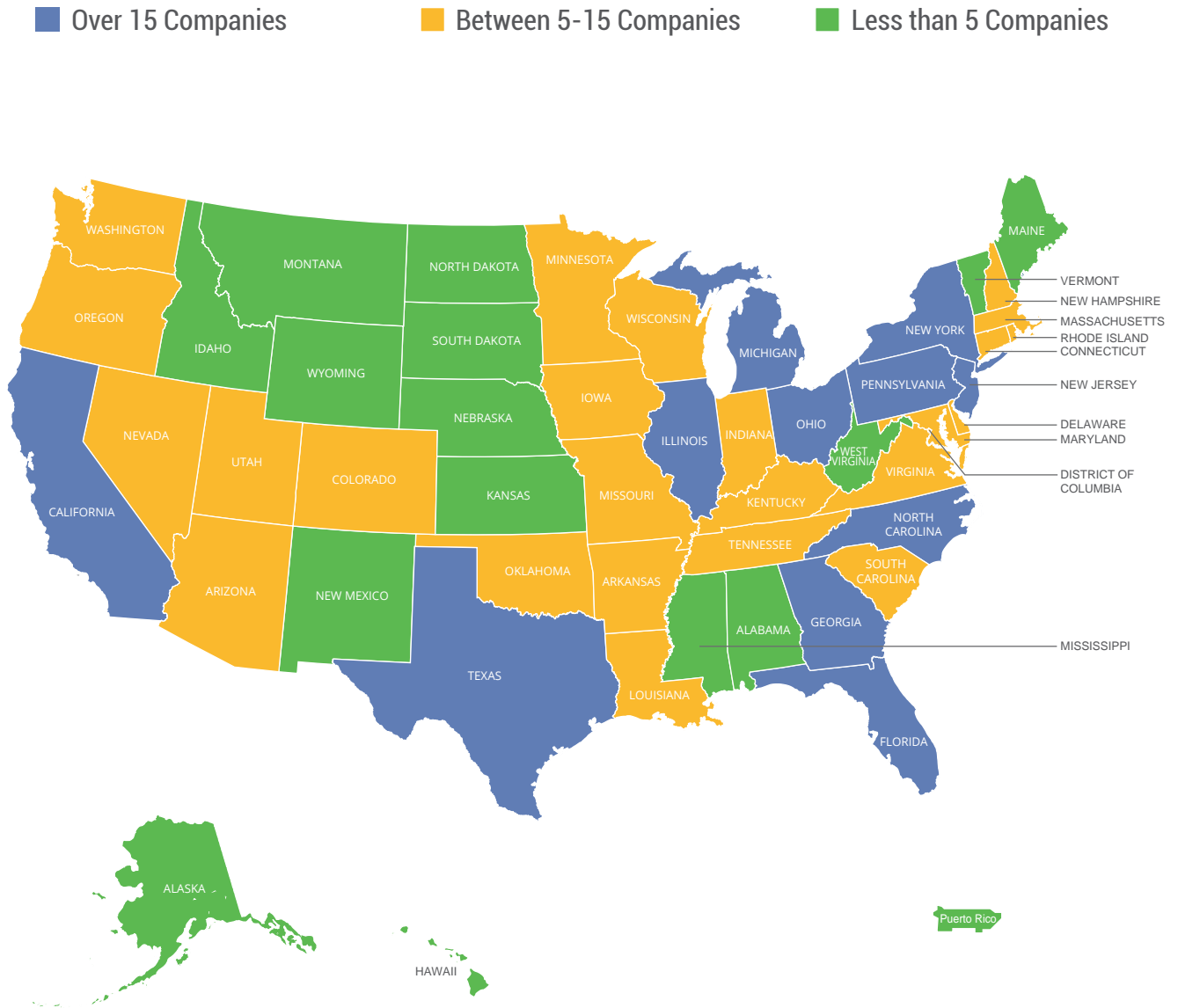


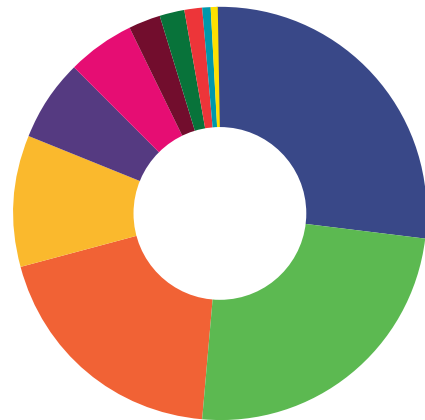
Figure 1: Geographical Presence of Indian Companies in the United States

Indian Companies in the United States: Sector Diversification

The diversification of industry sectors represented among Indian companies in the US is variegated in this year's survey data. Information Technology/Telecommunications and Life Sciences/Pharmaceuticals/Healthcare each represent approximately one-quarter of the number of Indian companies present in the US, and sectors like Manufacturing, and Automotive were also well represented. Additional sectors recognized in the survey include Financial Services, Energy, Tourism/Hospitality, Design/Engineering, Food/Agriculture, Aerospace/Defense, and Mining/Materials.

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

● Information Technology and Telecommunications	27.10%
● Life Sciences, Pharmaceuticals, and Healthcare	24.52%
● Manufacturing	19.35%
● Automotive	10.32%
● Energy	6.45%
● Financial Services	5.16%
● Tourism and Hospitality	2.58%
● Design and Engineering	1.94%
● Food and Agriculture	1.29%
● Aerospace and Defense	0.65%
● Mining and Materials	0.65%

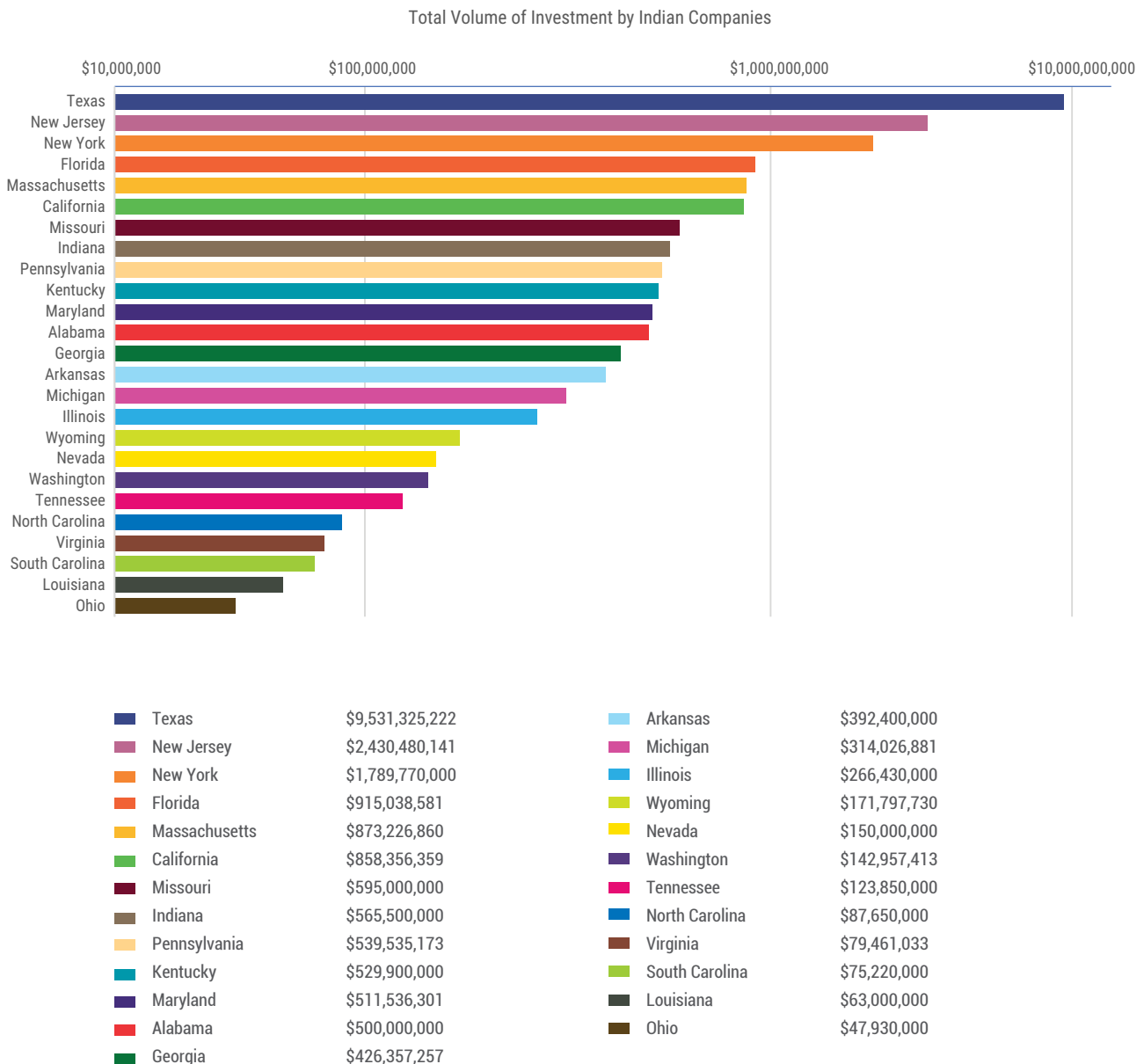


Indian Companies in the United States: Tangible Investments

The aggregate of tangible investments reported in the 2020 survey surpassed \$22.6 billion. Responses indicate that Indian companies have tangible investments across 42 states and territories. The median amount of investment across states was \$83.56 million, while 20 states listed investments of over \$100 million. The top ten states with the largest

amount of FDI from Indian companies are Texas (\$9.53 billion), New Jersey (\$2.43 billion), New York (\$1.79 billion), Florida (\$915 million), Massachusetts (\$873 million), California (\$858 million), Missouri (\$595 million), Indiana (\$566 million), Pennsylvania (\$540 million), Kentucky (\$529 million).

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

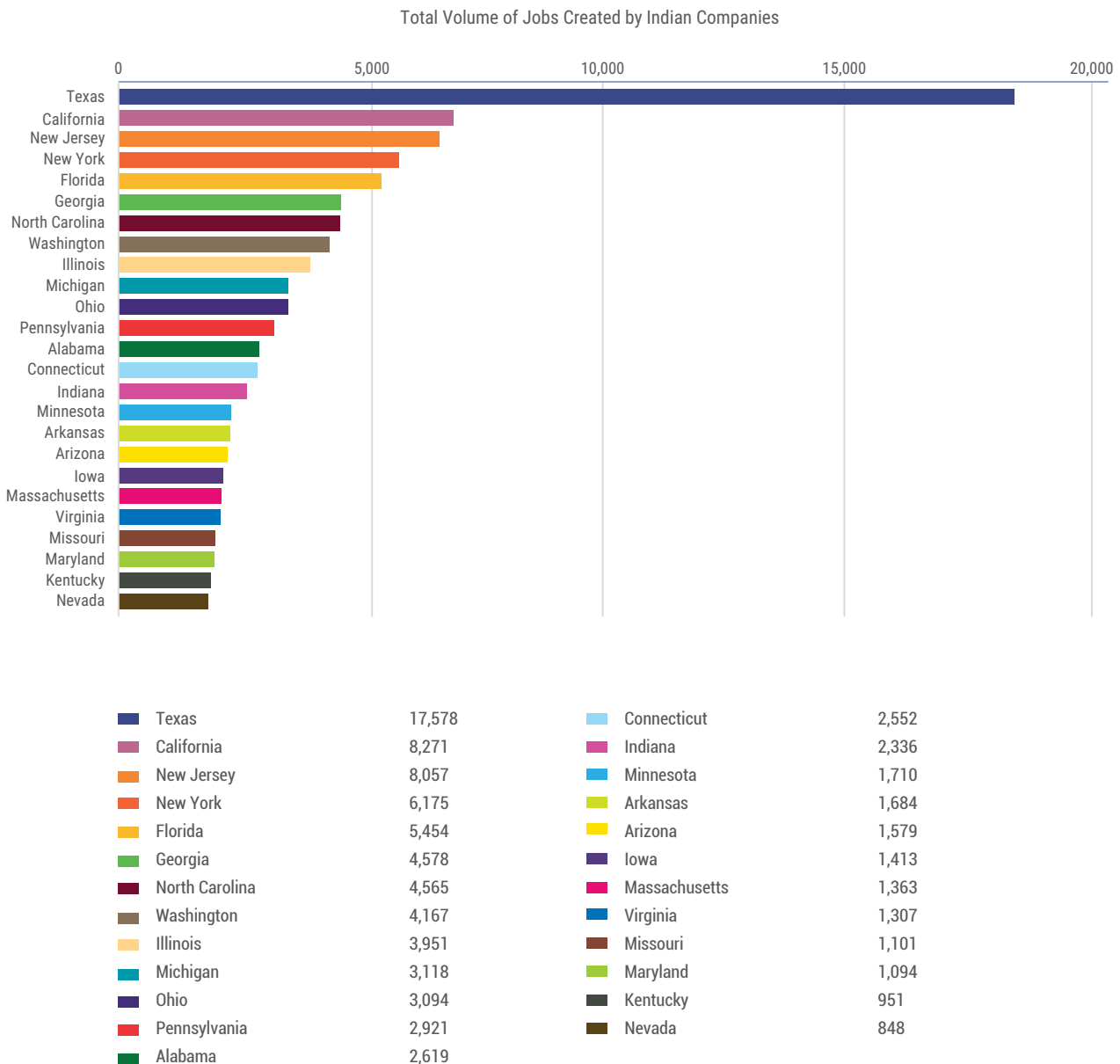


Indian Companies in the United States: Job Creation

The collective sum of jobs created by the surveyed Indian companies in the US is 124,730. These jobs span all 50 states as well as the District of Columbia and Puerto Rico. The *Indian Roots, American Soil* survey only studies direct employment generation, and does not extrapolate the extent to which these positions are creating additional employment in supporting industries and ancillary services.

With the surveyed companies reporting the median number of employees across states as 831, the top ten states benefitting from jobs created by Indian companies are Texas (17,578), California (8,271), New Jersey (8,057), New York (6,175), Florida (5,454), Georgia (4,578), North Carolina (4,565), Washington (4,167), Illinois (3,951), and Michigan (3,118).

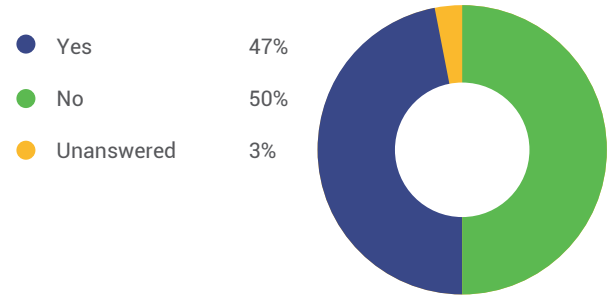
Figure 4: Indian Companies in the United States: Top Job Creation



Indian Companies in the United States: Research & Development

Of the 155 companies surveyed, 47% reported conducting research and development (R&D) in the US. In aggregate they have spent more than \$890 million on funding US innovation activities.

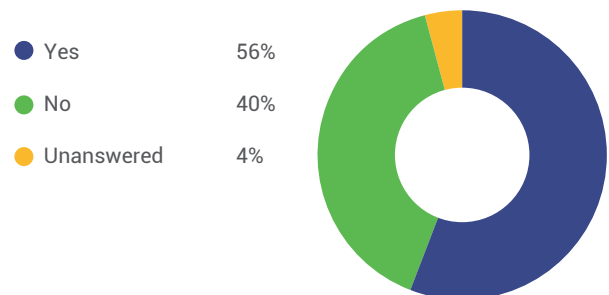
Figure 5: Indian Companies in the United States: Percentage of Surveyed Companies Conducting R&D



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

Indian companies are not only bringing business and job opportunities to the US, they are investing in the people and communities of their adopted homes as well. The companies surveyed for this report have invested nearly \$175 million in corporate social responsibility (CSR) initiatives at both the local and national levels throughout the US. CSR programming highlights by the surveyed companies include: donating tens of millions of dollars of critically-needed medications to funding flood relief and food pantries, as well as supporting numerous ecological and sustainability nonprofits and fundraisers.

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



A common cause shared by many of the surveyed companies is supporting the education of children and empowering educators, particularly in the STEM fields. This investment in the future generations of the US ranges from providing books and laptops for low-income students to conducting skilling and technical training programmes to ensure their competitiveness in the global knowledge economy as well as local employment.

Indian companies have also risen to the challenge of supporting the people of the US during the COVID-19 global crisis. Indian companies have reported providing supply chain assistance and shifting their manufacturing to essential units (including hospital beds and patient transport vehicles), as well as launching an e-learning platform to support educators transitioning to online instruction. Indian industry in the US is not only investing in local economies, they are ensuring a future for their communities.

Indian Companies in the United States: Future Plans

Despite the global economic downturn, Indian companies continue to view the US as the land of opportunity. Of the companies surveyed, 83% plan to hire additional local employees in the next five years. 77% of companies are planning future investments in the US, while 44% are also considering funding future R&D initiatives stateside.

When asked which state offered the most favourable business environment, there was evident agreement among the companies surveyed. New York and Texas tied as the most-cited states with the best business environments, with New Jersey and Georgia following in a very narrow margin for second and third respectively. California ranked fourth in the survey, while Florida, Michigan, and Washington state all tied as the fifth-most cited states with favourable business climates.

Figure 7: Indian Companies in the United States: Percentage of Surveyed Companies Planning Investments in the US in the next five years

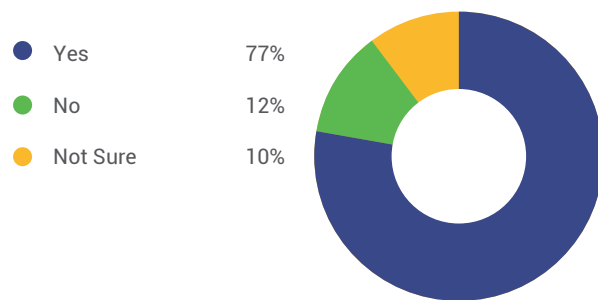


Figure 8: Indian companies in the United States: Percentage of Surveyed Companies Planning to hire Employees in the US in the next five years

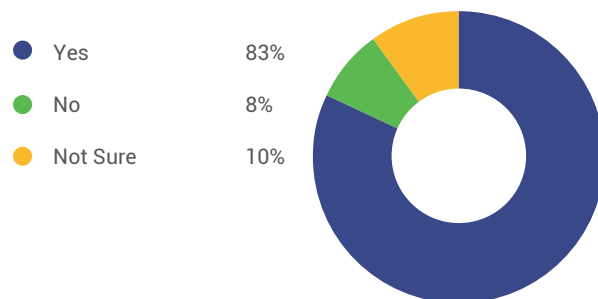
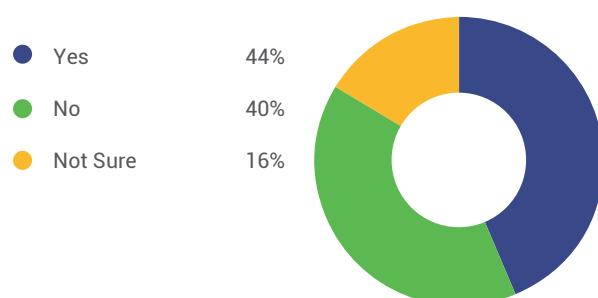


Figure 9: Indian companies in the United States: Percentage of Surveyed Companies Planning R&D Expenditure in the US in the next five years



Survey Results

Top 25 States with the Largest Investments by Indian Companies



01

Texas



Indian Companies in Texas: Sector Diversification

Total Volume of Investment

\$9,531,325,222

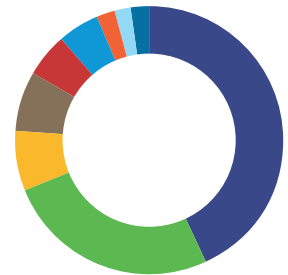
Number of Jobs Created

17,578

Number of Indian Companies Present

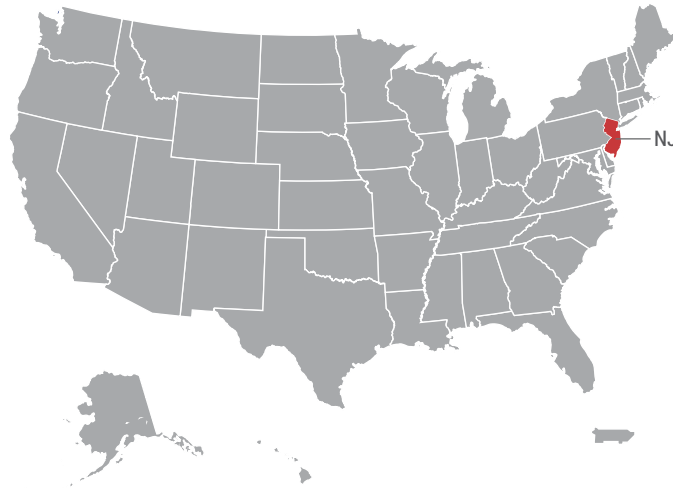
40

- Information Technology and Telecommunications **42.50%**
- Energy **25.00%**
- Automotive **7.50%**
- Manufacturing **7.50%**
- Design and Engineering **5.00%**
- Life Sciences, Pharmaceuticals and Healthcare **5.00%**
- Mining, and Materials **2.50%**
- Financial Services **2.50%**
- Food and Agriculture **2.50%**



02

New Jersey



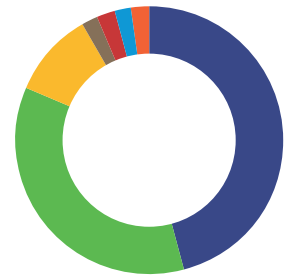
Indian Companies in New Jersey: Sector Diversification

Total Volume of Investment
\$2,430,480,141

Number of Jobs Created
8,057

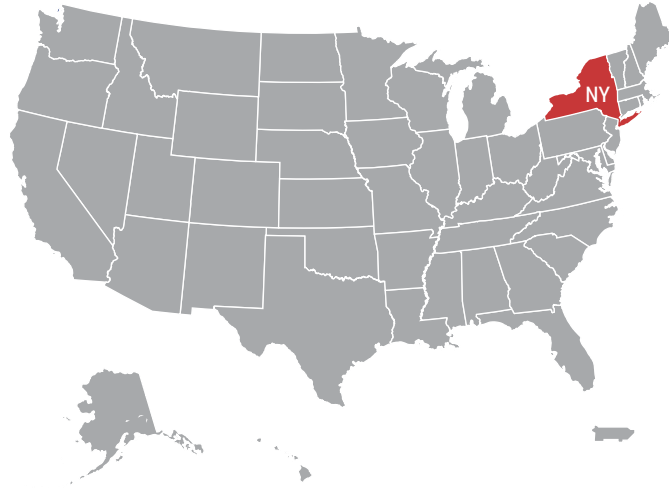
Number of Indian Companies Present
40

- Information Technology and Telecommunications **45.00%**
- Life Sciences, Pharmaceuticals and Healthcare **35.00%**
- Manufacturing **10.00%**
- Mining, and Materials **2.50%**
- Food and Agriculture **2.50%**
- Energy **2.50%**
- Automotive **2.50%**



03

New York



Indian Companies in New York: Sector Diversification

Total Volume of Investment

\$1,789,770,000

Number of Jobs Created

6,175

Number of Indian Companies Present

30

- Information Technology and Telecommunications **50.00%**
- Financial Services **13.33%**
- Tourism and Hospitality **10.00%**
- Life Sciences, Pharmaceuticals and Healthcare **10.00%**
- Manufacturing **6.67%**
- Automotive **6.67%**
- Food and Agriculture **3.33%**



04

Florida



Indian Companies in Florida: Sector Diversification

Total Volume of Investment

\$915,038,581

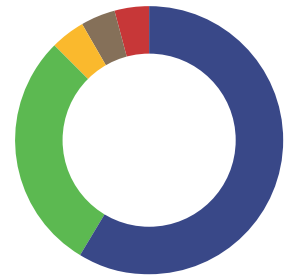
Number of Jobs Created

5,454

Number of Indian Companies Present

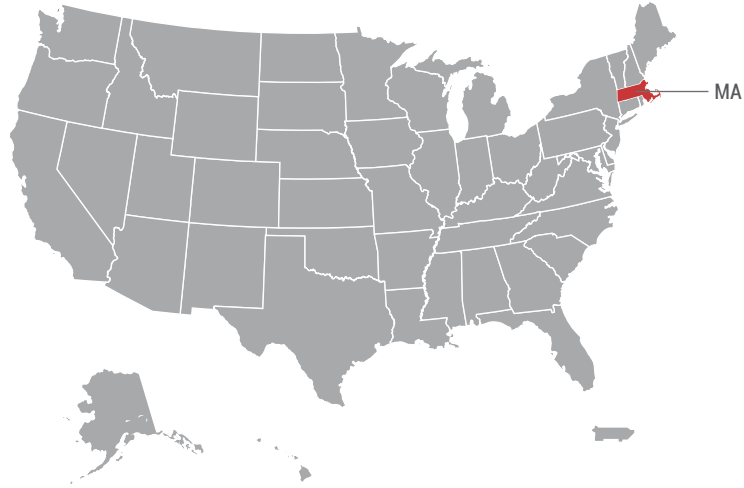
21

- Information Technology and Telecommunications **57.14%**
- Life Sciences, Pharmaceuticals and Healthcare **28.57%**
- Aerospace and Defense **4.76%**
- Design and Engineering **4.76%**
- Financial Services **4.76%**



05

Massachusetts



Indian Companies in Massachusetts: Sector Diversification

Total Volume of Investment

\$873,226,860

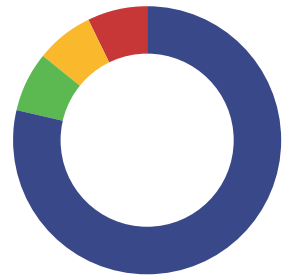
Number of Jobs Created

1,363

Number of Indian Companies Present

14

- Information Technology and Telecommunications **78.57%**
- Food and Agriculture **7.14%**
- Manufacturing **7.14%**
- Life Sciences, Pharmaceuticals and Healthcare **7.14%**



06

California



Indian Companies in California: Sector Diversification

Total Volume of Investment

\$858,356,359

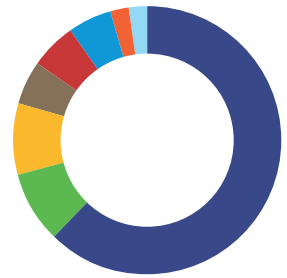
Number of Jobs Created

8,271

Number of Indian Companies Present

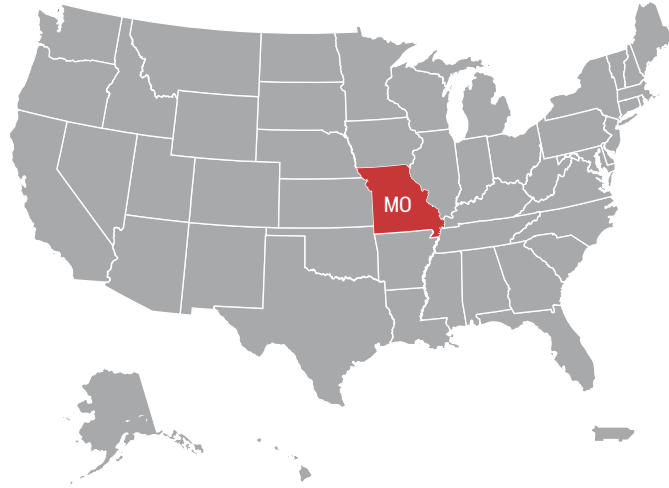
34

- Information Technology and Telecommunications **58.82%**
- Manufacturing **8.82%**
- Life Sciences, Pharmaceuticals and Healthcare **8.82%**
- Design and Engineering **5.88%**
- Financial Services **5.88%**
- Food and Agriculture **5.88%**
- Tourism and Hospitality **2.94%**
- Automotive **2.94%**



07

Missouri



Indian Companies in Missouri: Sector Diversification

Total Volume of Investment

\$595,000,000

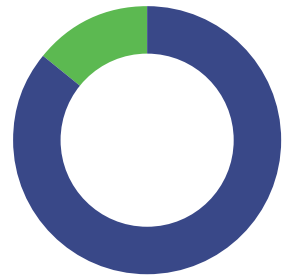
Number of Jobs Created

1,101

Number of Indian Companies Present

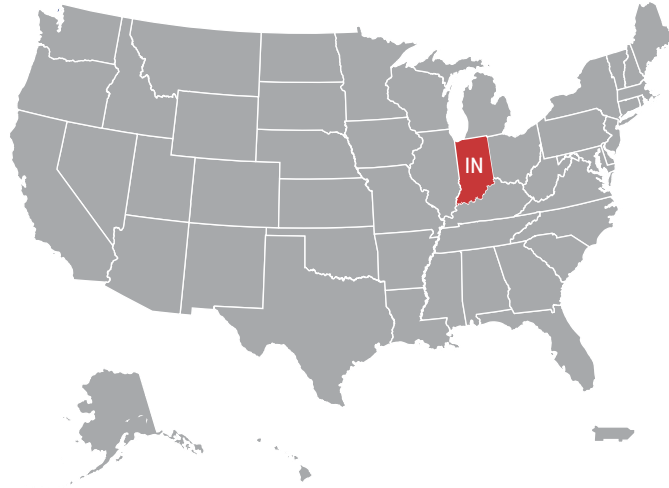
7

- Information Technology and Telecommunications **85.71%**
- Life Sciences, Pharmaceuticals and Healthcare **14.29%**



08

Indiana



Indian Companies in Indiana: Sector Diversification

Total Volume of Investment

\$565,500,000

Number of Jobs Created

2,336

Number of Indian Companies Present

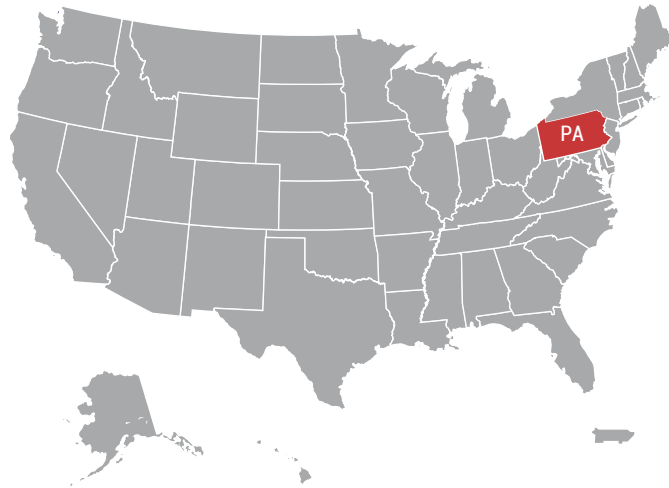
9

- Information Technology and Telecommunications **66.67%**
- Manufacturing **22.22%**
- Automotive **11.11%**



09

Pennsylvania



Indian Companies in Pennsylvania: Sector Diversification

Total Volume of Investment

\$539,535,173

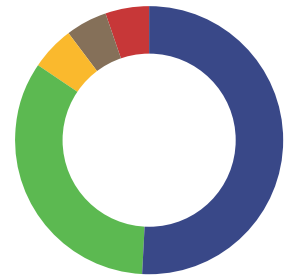
Number of Jobs Created

2,921

Number of Indian Companies Present

18

- Information Technology and Telecommunications **50.00%**
- Life Sciences, Pharmaceuticals and Healthcare **33.33%**
- Manufacturing **5.56%**
- Design and Engineering **5.56%**
- Automotive **5.56%**



10

Kentucky



Indian Companies in Kentucky: Sector Diversification

Total Volume of Investment

\$529,900,000

Number of Jobs Created

951

Number of Indian Companies Present

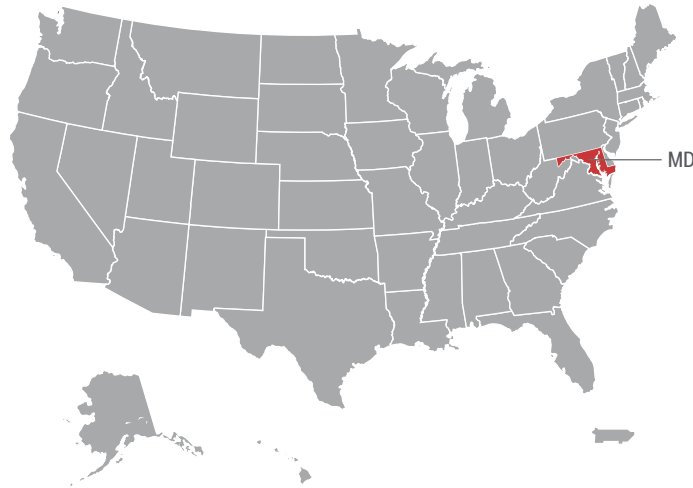
10

- Information Technology and Telecommunications **50.00%**
- Manufacturing **30.00%**
- Life Sciences, Pharmaceuticals and Healthcare **20.00%**



11

Maryland



Indian Companies in Maryland: Sector Diversification

Total Volume of Investment

\$511,536,301

Number of Jobs Created

1,094

Number of Indian Companies Present

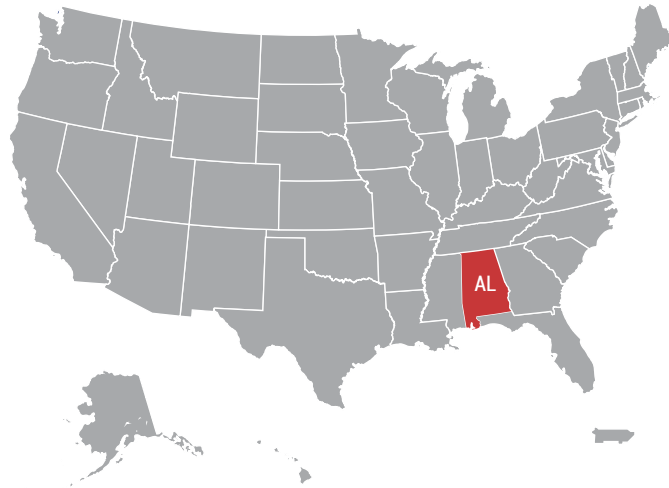
14

- Information Technology and Telecommunications **50.00%**
- Life Sciences, Pharmaceuticals and Healthcare **42.86%**
- Food and Agriculture **7.14%**



12

Alabama



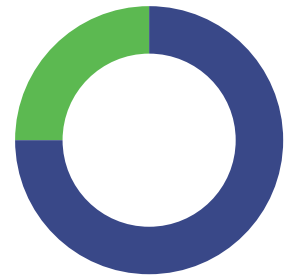
Indian Companies in Alabama: Sector Diversification

Total Volume of Investment
\$500,000,000

Number of Jobs Created
2,619

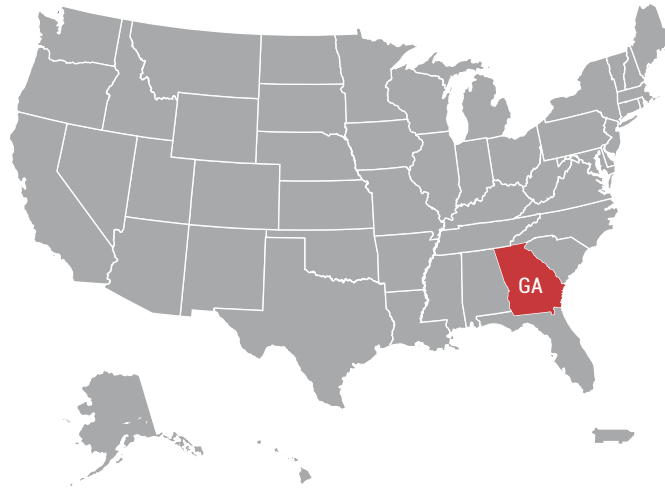
Number of Indian Companies Present
4

- Information Technology and Telecommunications **75.00%**
- Automotive **25.00%**



13

Georgia



Indian Companies in Georgia: Sector Diversification

Total Volume of Investment

\$426,357,257

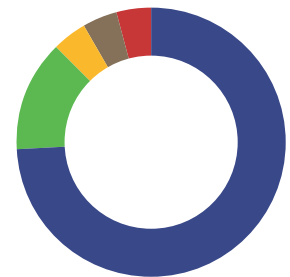
Number of Jobs Created

4,578

Number of Indian Companies Present

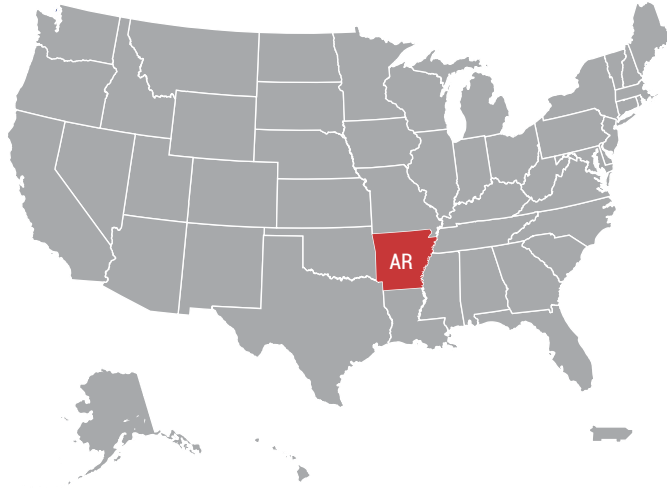
22

- Information Technology and Telecommunications **72.73%**
- Manufacturing **13.64%**
- Life Sciences, Pharmaceuticals and Healthcare **4.55%**
- Food and Agriculture **4.55%**
- Automotive **4.55%**



14

Arkansas



Indian Companies in Arkansas: Sector Diversification

Total Volume of Investment

\$392,400,000

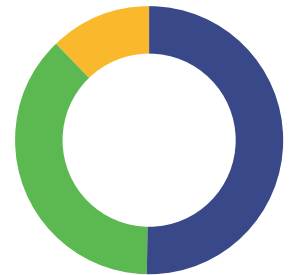
Number of Jobs Created

1,684

Number of Indian Companies Present

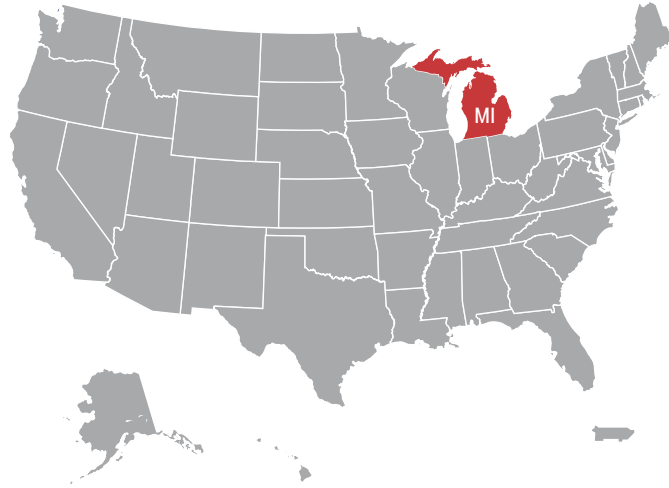
8

- Information Technology and Telecommunications **50.00%**
- Manufacturing **37.50%**
- Design and Engineering **12.50%**



15

Michigan



Indian Companies in Michigan: Sector Diversification

Total Volume of Investment

\$314,026,881

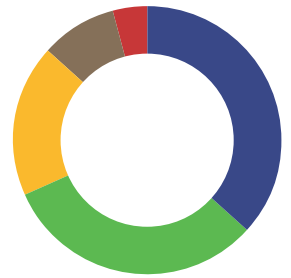
Number of Jobs Created

3,118

Number of Indian Companies Present

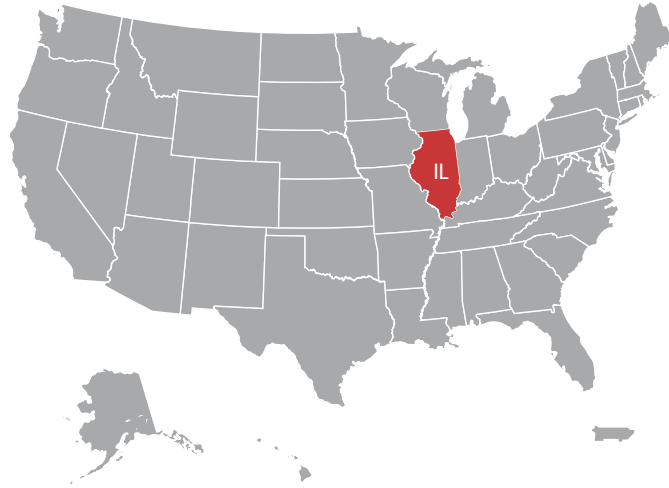
22

- Automotive **36.36%**
- Information Technology and Telecommunications **31.82%**
- Manufacturing **18.18%**
- Life Sciences, Pharmaceuticals and Healthcare **9.09%**
- Energy **4.55%**



16

Illinois



Indian Companies in Illinois: Sector Diversification

Total Volume of Investment

\$266,430,000

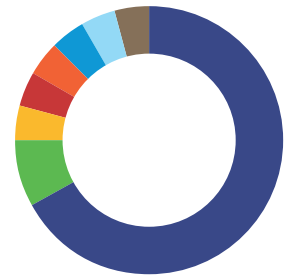
Number of Jobs Created

3,951

Number of Indian Companies Present

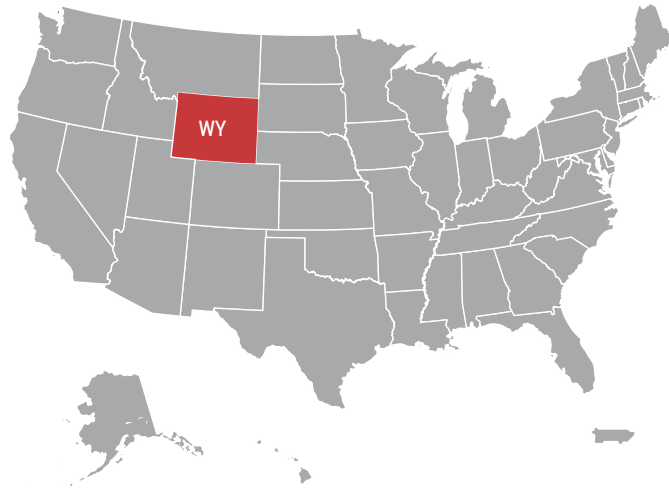
23

- Information Technology and Telecommunications **65.22%**
- Financial Services **8.70%**
- Design and Engineering **4.35%**
- Manufacturing **4.35%**
- Life Sciences, Pharmaceuticals and Healthcare **4.35%**
- Automotive **4.35%**
- Energy **4.35%**
- Food and Agriculture **4.35%**



17

Wyoming



Indian Companies in Wyoming: Sector Diversification

Total Volume of Investment

\$171,797,730

Number of Jobs Created

553

Number of Indian Companies Present

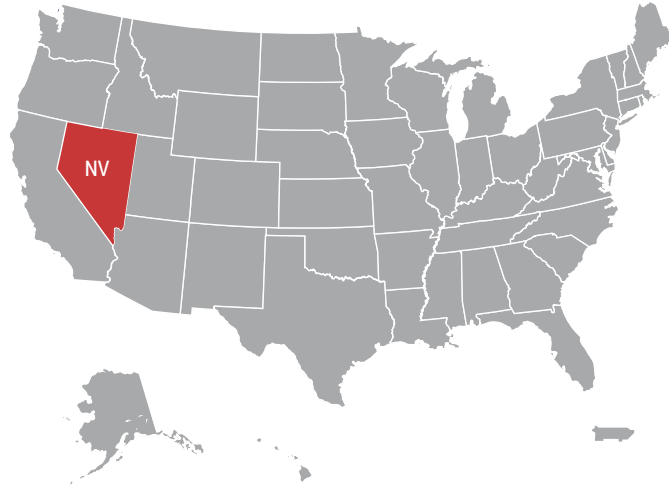
3

- Information Technology and Telecommunications **66.67%**
- Mining, and Materials **33.33%**



18

Nevada



Indian Companies in Nevada: Sector Diversification

Total Volume of Investment

\$150,000,000

Number of Jobs Created

848

Number of Indian Companies Present

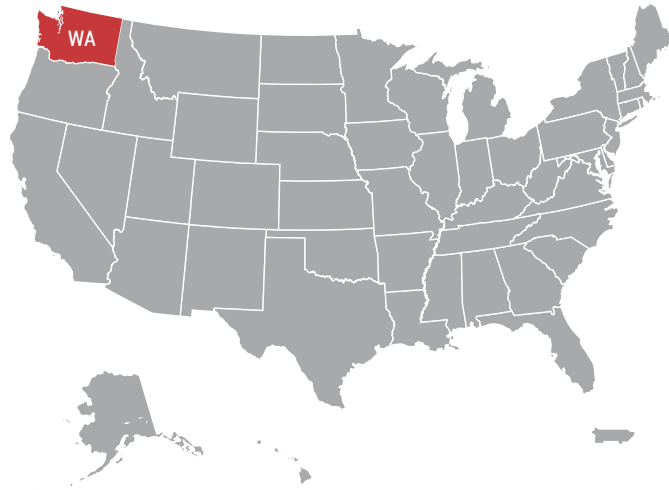
5

- Information Technology and Telecommunications **80.00%**
- Tourism and Hospitality **20.00%**



19

Washington



Indian Companies in Washington: Sector Diversification

Total Volume of Investment

\$142,957,413

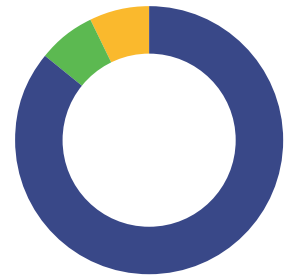
Number of Jobs Created

4,167

Number of Indian Companies Present

14

- Information Technology and Telecommunications **85.71%**
- Manufacturing **7.14%**
- Life Sciences, Pharmaceuticals and Healthcare **7.14%**



20

Tennessee



Indian Companies in Tennessee: Sector Diversification

Total Volume of Investment

\$123,850,000

Number of Jobs Created

574

Number of Indian Companies Present

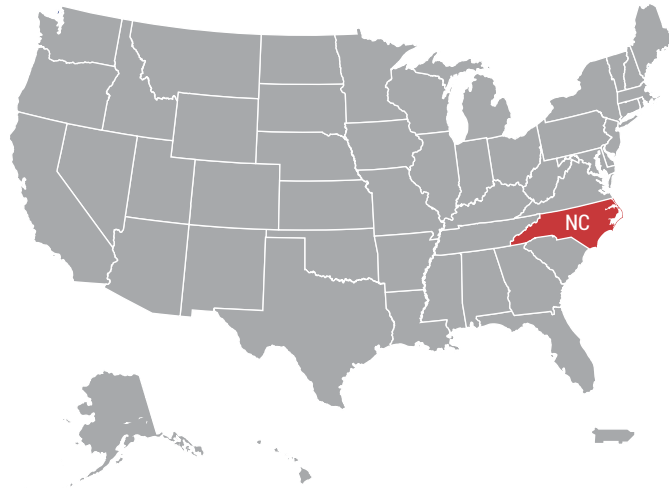
8

- Information Technology and Telecommunications **50.00%**
- Life Sciences, Pharmaceuticals and Healthcare **25.00%**
- Manufacturing **12.50%**
- Automotive **12.50%**



21

North Carolina



Indian Companies in North Carolina: Sector Diversification

Total Volume of Investment

\$87,650,000

Number of Jobs Created

4,565

Number of Indian Companies Present

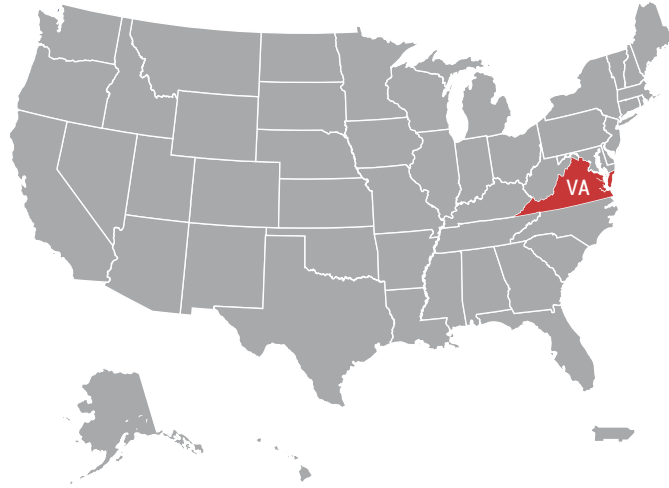
19

- Information Technology and Telecommunications **68.42%**
- Manufacturing **15.79%**
- Mining, and Materials **5.26%**
- Design and Engineering **5.26%**
- Life Sciences, Pharmaceuticals and Healthcare **5.26%**



22

Virginia



Indian Companies in Virginia: Sector Diversification

Total Volume of Investment

\$79,461,033

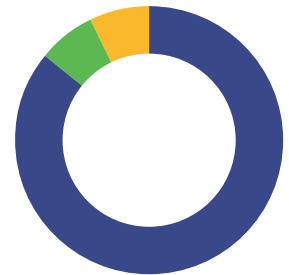
Number of Jobs Created

1,307

Number of Indian Companies Present

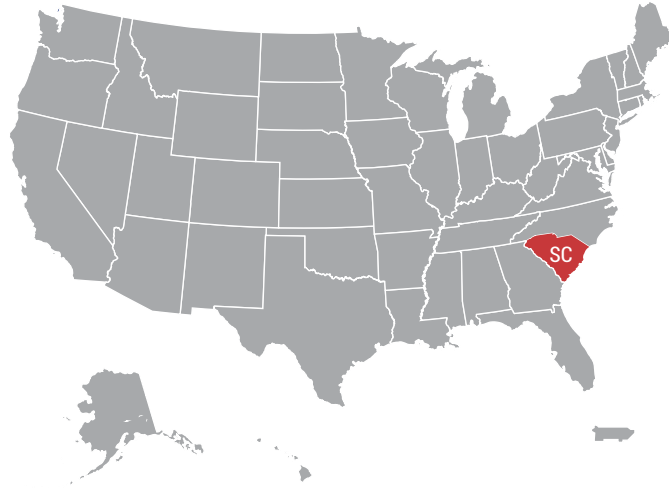
14

- Information Technology and Telecommunications **85.71%**
- Manufacturing **7.14%**
- Life Sciences, Pharmaceuticals and Healthcare **7.14%**



23

South Carolina



Indian Companies in South Carolina: Sector Diversification

Total Volume of Investment

\$75,220,000

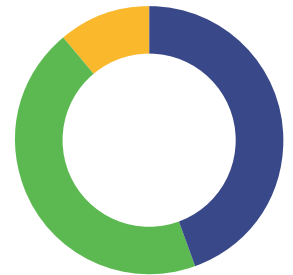
Number of Jobs Created

264

Number of Indian Companies Present

9

- Manufacturing **44.44%**
- Information Technology and Telecommunications **44.44%**
- Food and Agriculture **11.11%**



24

Louisiana



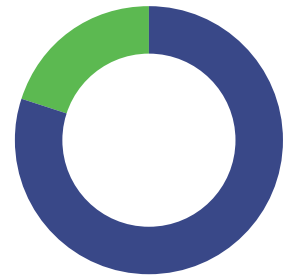
Indian Companies in Louisiana: Sector Diversification

Total Volume of Investment
\$63,000,000

Number of Jobs Created
328

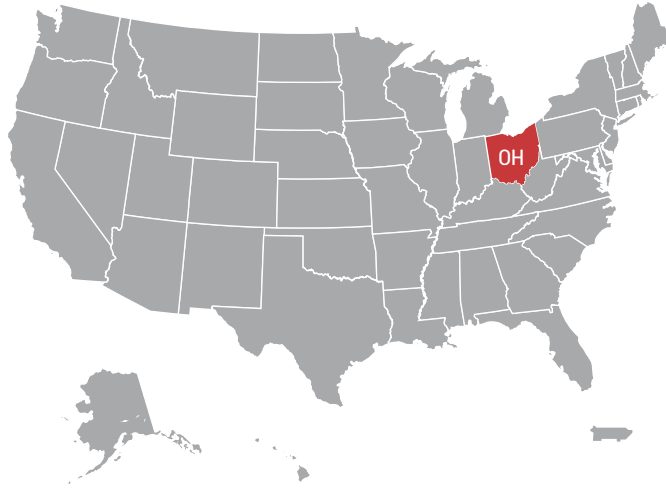
Number of Indian Companies Present
5

- Information Technology and Telecommunications **80.00%**
- Life Sciences, Pharmaceuticals and Healthcare **20.00%**



25

Ohio



Indian Companies in Ohio: Sector Diversification

Total Volume of Investment

\$47,930,000

Number of Jobs Created

3,094

Number of Indian Companies Present

16

- Information Technology and Telecommunications **62.50%**
- Manufacturing **12.50%**
- Automotive **12.50%**
- Mining, and Materials **6.25%**
- Life Sciences, Pharmaceuticals and Healthcare **6.25%**



COVID-19

As the entire world grapples with the detrimental impact of the COVID-19 outbreak, the full extent of the corresponding economic consequences have yet to be revealed. While the pandemic may impact Indian companies' future investments and job creation in the US, for FDI to continue to grow, forward-looking policies that combat rising anti-globalist sentiment may ameliorate some of the worst effects of the crisis.

Indian companies are leading COVID-19 response actions throughout the US, in addition to their regular CSR initiatives. Pharmaceutical companies are increasing their focus on R&D to race to the cure, and many are also donating drugs for discovery and trials. One Indian hospitality

company is providing free rooms to first responders across the country, while several tech companies are either launching e-learning platforms or enabling free access to their STEM and computer skills training lessons online for students and teachers suddenly faced with distance learning.

The *Indian Roots, American Soil* survey report has demonstrated throughout the years that Indian companies' shoulder the needs of their local communities and neighbours as a measure of their own success: COVID-19 and Indian industry's US response thereof further demonstrates the symbiotic focus Indian companies revere in the care of their local communities.

Conclusion

The sixth edition of CII's seminal *Indian Roots, American Soil* survey report continues to document the growing interests and commitment of Indian companies to the prosperity of the US economy and people. Indian companies' increased tangible investments and job creation across all 50 US states, as well as the District of Columbia and Puerto Rico, have bolstered the last two years of historic economic growth in the US.

Indian companies' growing CSR and R&D contributions not only palpably demonstrate their commitment to enhancing the competitiveness of local US companies and employees, they also are often strategically designed to support long-term commitments to the social, educational, and capacity-building needs of their adopted communities. By investing in their local communities, Indian companies are not only planting roots, they are ensuring that their investment story will continue to grow.

By no means does this survey present the full and comprehensive picture of Indian FDI in the US – it is a significant effort reflecting a snapshot in time, a compilation of 155 companies' data featured in the survey, which goes to say that the full range and impact of Indian investment in the US is much greater than the results that can be seen here.

As the footprint of Indian industry continues to spread across the US, CII's *Indian Roots, American Soil* is the exclusive resource to better understand the role of Indian investments in the different regions across the US. Indian industry in the US is a critical component of the transforming India-US bilateral partnership, and will only grow stronger with continued support by states cultivating encouraging and business-friendly ecosystems.

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Confederation of Indian Industry
125 Years - Since 1895

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.

For 125 years, CII has been working on shaping India's development journey and, this year, more than ever before, it will continue to proactively transform Indian industry's engagement in national development.

CII is a non-government, not-for-profit, industry-led and industry-managed organization, with about 9100 members from the private as well as public sectors, including SMEs and MNCs, and an indirect membership of over 300,000 enterprises from 288 national and regional sectoral industry bodies.

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.

With the Theme for 2020-21 as Building India for a New World: Lives, Livelihood, Growth, CII will work with Government and industry to bring back growth to the economy and mitigate the enormous human cost of the pandemic by protecting jobs and livelihoods.

With 68 offices, including 9 Centres of Excellence, in India, and 11 overseas offices in Australia, China, Egypt, France, Germany, Indonesia, Singapore, South Africa, UAE, UK, and USA, as well as institutional partnerships with 394 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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