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1. Introduction

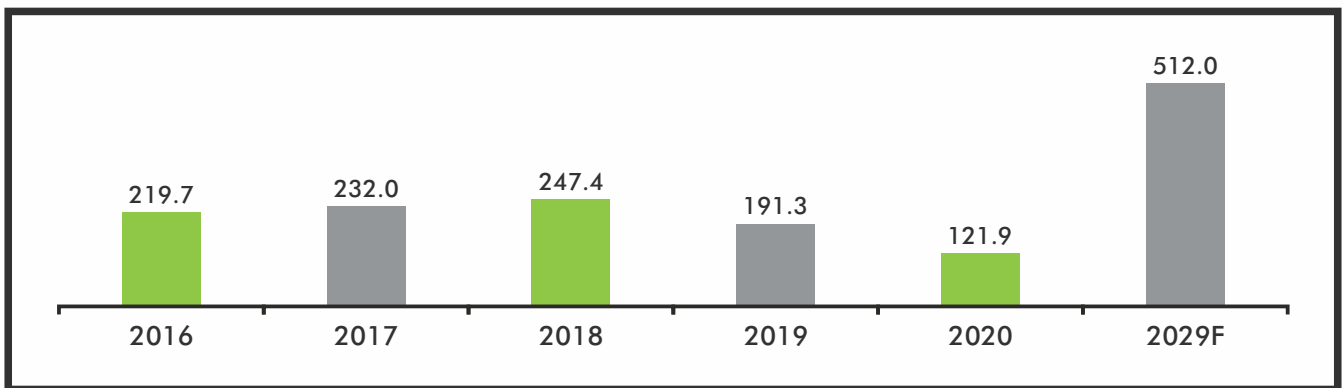
Atithi Devo Bhav!

The soul and spirit of the Indian tourism industry to welcome every visitor with folding hands of Namaste and open hearts, from the corners of the world and become one of the biggest contributors of the Indian economy. But with the emergence of the global Covid 19 pandemic, the tourism industry got to stand still globally and as per the UN World Tourism Organization, this pandemic is recorded to be the worst crisis for international tourism since its inception.

When the whole world was in lockdown, all the passenger traffic was suspended, and the logistic supply chain was on its low, the people were behind closed doors and the people who were dependent on the tourism industry for their livelihood were on the margins of life.

Before the pandemic tourism industry in India has been estimated to grow at the rate of 10% and contribute to the 8% of the total employment of the country so far. As per the industry forecast, the tourism industry was expected to create almost 53 million jobs and contribute to US\$ 512 Billion by 2029.

Travel and Tourism's Total Contribution to GDP (US\$ billion)



Source: <https://www.ibef.org/industry/tourism-hospitality-india.aspx>

But, the Covid 19 has created havoc for the tourism industry as well as for mankind all over the globe. It has created unprecedented damage to global health systems, social structures, and world economies. Tourism has been one of the main contributors to revenue, employment, and tax collections for the country and was significantly showing rising trends before the pandemic. Thus, the trend got badly hit by the emergence of this highly infectious virus and put tourism in the backseat.

In past, the Indian government has promoted the industry with various initiatives like Incredible India, Swadesh darshan, etc. This has widely promoted the rich culture, historical heritage, varying seasons, range of terrains and ecology of India to make it an attractive destination for domestic as well as foreign tourists and travellers, Which contributes to the growth of the Indian economy by adding significant foreign exchange to the reserve.

The government policy framework and their commitment to boost the travel economy in the country has shown positive results before the emergence of the pandemic when the World Travel and Tourism Council has awarded 10th rank to India out of 185 countries as per the gross contribution to the country's GDP in the year 2019. The progression makes the Indian tourism industry highly competitive and at par with global tourist economies.

The diversity of ecology, culture, and tradition from Kashmir to Kanya kumari, and Gujarat to the North East attract every tourist from the corners of the globe towards its authenticity. The prominent four seasons in the country gives all flavours to life, and the feel of mountains to Plain, Desert to Sea make tourists enjoy every natural terrain in a single walk of the country. But all this went on complete rest for more than two years and got its track of enthusiasm back after three waves of the deadly Covid 19 virus in recent times.

The travel and tourism industry is recording a surge in the number of domestic tourists and received keen interest from foreign travellers after the second wave of the pandemic. As the third wave has not severely hit the local as well as international travel by far and thus kept the momentum on positively. This helped people to come out of the psychological trauma faced during the first two waves of the pandemic and encouraged them to go out and spend some leisure time with their loved ones.

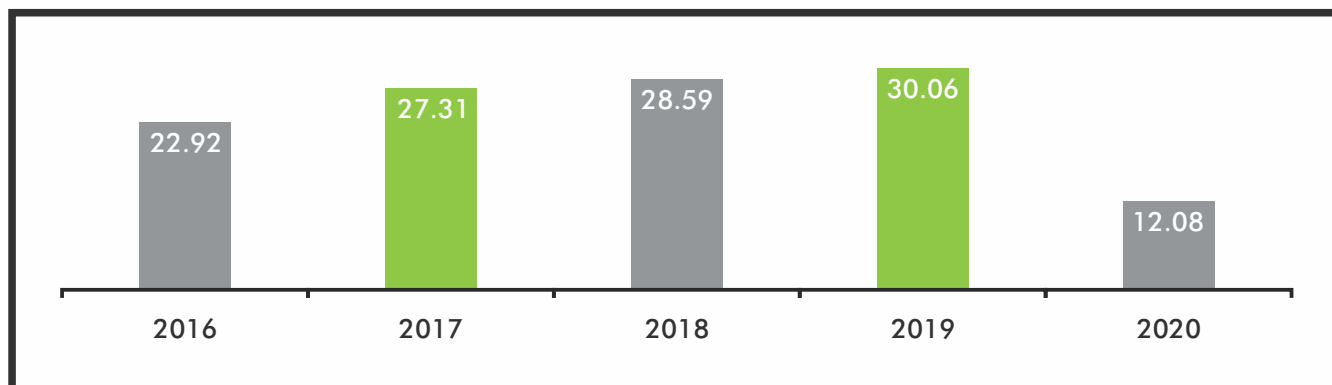
But to effectively understand the dynamics of the industry in the new normal world and serve the tourists with their best experiences, it is important to get correct forecasting and estimation for the domestic as well as international tourists. This way, the industry can better serve the tourists with great pricing, resource, safety, and comfort. Thus the government in the country needs to focus on the research and data processing facilities related to the tourism industry as one of the important aspects to rebuilt it in the post-pandemic scenario and redevelop the livelihood means of the people directly connected to the industry.

India in this way can present itself as one of the largest potential markets in the tourism industry in its various facets such as religious tourism, eco-tourism, wellness tourism, medical tourism, etc in the coming days. This all will ratify the government's vision to promote tourism in India through various circuits and infrastructure development and proved to be a great trendsetter for the industry. This will help the country to grow the economy and foreign exchange side by side along with the exposure to different cultures, traditions, and knowledge of the world.



Each of these categories attracts decent revenue from foreign travellers every year and contribute to the national economy by adding foreign reserves of billions in worth.

Foreign Exchange Earnings from Tourism in India (US\$ billion)



Source: <https://www.ibef.org/industry/tourism-hospitality-india.aspx>

The tourism industry contributes to the Indian GDP of US\$ 121.9 Billion in the financial year 2020. The industry recorded the highest growth in this service sector and contributed to around 39 million jobs in the same year. India is one of the digitally advanced tourist nations in terms of the use of online facilities used from the range of travel bookings, planning, etc including the e- Visa facility. As per projections, all the advancements and tourism supported vision adopted by the government will boost the growth of the sector exponentially and it will touch the mark of US\$ 125 Billion by the year 2027.

Some of the quick facts about the Indian Tourism industry that proves the growth and digital adaptability of the country in the sector and the benefit it received from such responsive steps are worth appreciation:



The growth of the industry is directly correlated to the development of infrastructure and digital connectivity in the country along with the up-gradation of air connectivity for international as well as domestic travellers and tourists. The government's initiatives such as RCS- UDAN have significantly helped to boost air travel for domestic tourists and hence help people to save their time and help them to plan their travel much more efficiently.

As per projections till 2027, the air travel and hotel market in India is expected to be around US\$ 40 billion and US\$ 52 billion respectively. Medical tourism in India has seen a growth of US\$ 9 billion in 2020. The facility of e- tourist visas has contributed significantly to these growing numbers. With the enthusiastic response from the travellers and tourists, the country has extended

2. Incredible India: Landscape of Tourism and Industry Trends

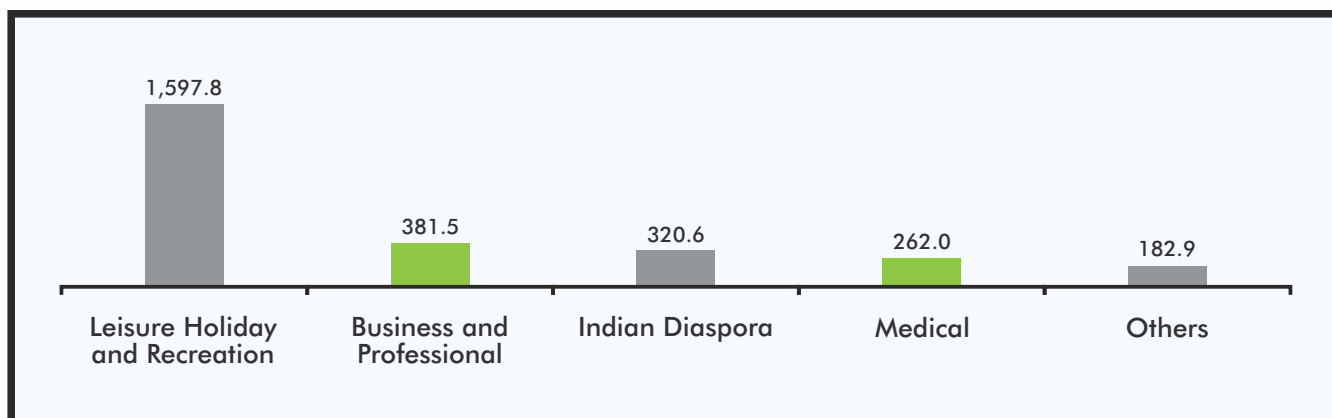
The diversity in Indian cuisines, languages, attires and living styles attract crores of domestic as well as international travellers and tourists around the year. This plays one of the major sources of livelihood of people living in a beautiful distant and remote tourist destination in the country like Andaman Nicobar, Leh, etc and thus significantly take part in the growth of the Indian economy in their extraordinary way. The Pochampally village in Telangana is one such beautiful village of India which received appreciation at the global level and was declared as one of the best tourism villages by the United Nations World Tourism Organization.

India is home to cultural and natural diversity around the length and breadth of the country with baggings of 40 World Heritage Sites like Agra Fort, Ajanta Caves, 4 Biodiversity hotspots like Eastern Himalayas, Western Ghats, and 104 National Parks like Dudhwa National Park, Buxa Tiger Reserve to name a few.



Thus, India Provides a range of travel and tourism categories for tourists. It hosts tourism facilities for Leisure Holidays, Business Trips, Medical, Educational, Cultural, wildlife, Entertainment, and many more dimensions. It attracts lakhs of foreign and domestic tourists to find a solution to their all needs from an isolated break from busy metro life to cost-effective medical facilities.

Purpose-wise Foreign Tourist Arrivals in 2020 (US\$ billion)



Source: <https://www.ibef.org/industry/tourism-hospitality-india.aspx>

this facility to the citizens in 171 countries as of March 2021.

In the period of January to April 2021, India has registered a negative growth of -84% in comparison to the same period of the previous year due to the emergence of the deadly second wave of Covid 19. The top 5 contributors in the Foreign Tourist Arrival list to India in April 2021 along with their respective percentages are as under:

S. No.	Country Name	% Share in Foreign Tourist Arrival
1.	United States of America	26.85
2.	Bangladesh	15.65
3.	Afghanistan	6.92
4.	United Kingdom	5.87
5.	Nepal	4.59

Foreign Tourist Arrival list to India in April 2021

As per the WTTC Economic Impact Report published in 2019, in terms of the number of jobs created in the tourism industry, India bagged one of the top positions and accounts for 6.36 Million total jobs. All these upcoming trends and forecasts are going to develop the Indian tourism industry at a fast pace and upgrade the facilities and services at new high levels as the demands of tourists and travellers will get evolve with time.

The government's plan to restart inbound tourism from November 2021 has also been proved to be a boon for all the stakeholders involved in this industry and for the tourists too. This all will cumulatively create impact and start to create more jobs in the industry once again and re-energise the sector once again for the tourists with rich unique experiences.



3. Growth Drivers and Challenges of Industry

Tourism is one of the fast-growing industries in the world and India too is reaping all the benefits of its growth. This growth helps India to accelerate its economy and also provide socio-economic equality to the people of the country. It provides opportunities for cultural, economic, and social collaborations and helps in eradicating poverty by generating income through tourism even in distant and isolated remote areas.

After the deadly 2nd wave of Covid 19, the domestic travellers and tourists were keen to go out and have some leisure time with family and friends to come out of that psychological challenging phase. At the same time, the economic and business activities were also getting their pace and providing new opportunities to the industry in the business tourism, medical, and entertainment.

The fastest-growing middle-class population of India with an increasing level of income was providing a major boost to the industry through domestic travel. The unprecedented growth in connectivity and infrastructure development of the country has encouraged domestic tourism which push the growth of the industry positively.

But Covid 19 pandemic has suspended this growth trajectory badly and adversely impacted all the stakeholders involved in the industry. It pushed many families into poverty due to phased lockdowns and a ban on domestic and international travel across the globe. The industry which was showing tremendous growth till 2019, went on standstill and recorded negative growth in 2020-21.

As the world economies are coming out of the shock of the Covid 19 pandemic, thanks to continuous fast vaccination drives and safety measures, India is too ready to serve its share of tourists with all cautions in 2022. The government is also providing enough push to promote tourism in the new normal post-Covid world and this all gives positive hope to stakeholders of the industry.

Some of the major drivers which helps India to attract tourists and help in rebuilding the Indian tourism industry in the post-Covid scenario are as follows:

- **Creation of Special Tourism Zones and Thematic Circuits**

The government has marked 5 Special Tourism Zones in the country and planned to develop them through Special Purpose Vehicles (SPVs) with the help of state governments. Through various initiatives and schemes government also promotes tourism in different pilgrimages by marking the different tourist circuits such as Buddhist Circuit, Ramayan Circuit, North-East India Circuit, etc. All these efforts rope in several tourists to the unexplored destinations of India and revive the economy of these places and showcase India's rich culture and heritage to them.

- **Cost-Effective Medical Tourism**

India is home to economical yet quality healthcare services in the world and thus attract a

significant number of tourists for the purpose. The performance of India's healthcare and research in the field during the Covid 19 pandemic has proved its robustness and skill once again. The rapidly increasing healthcare infrastructure in the country is going to provide impetus to medical tourism in the coming future.

- **Growth in Infrastructure and Digital Connectivity**

The safe inter-regional connectivity with digital access is the backbone of tourism and India is progressively working on both these parameters. The continuous up-gradation of transport connectivity along with expressway, all-weather roads and soon rolling out of 5G services is creating the best breeding place for the tourism industry.

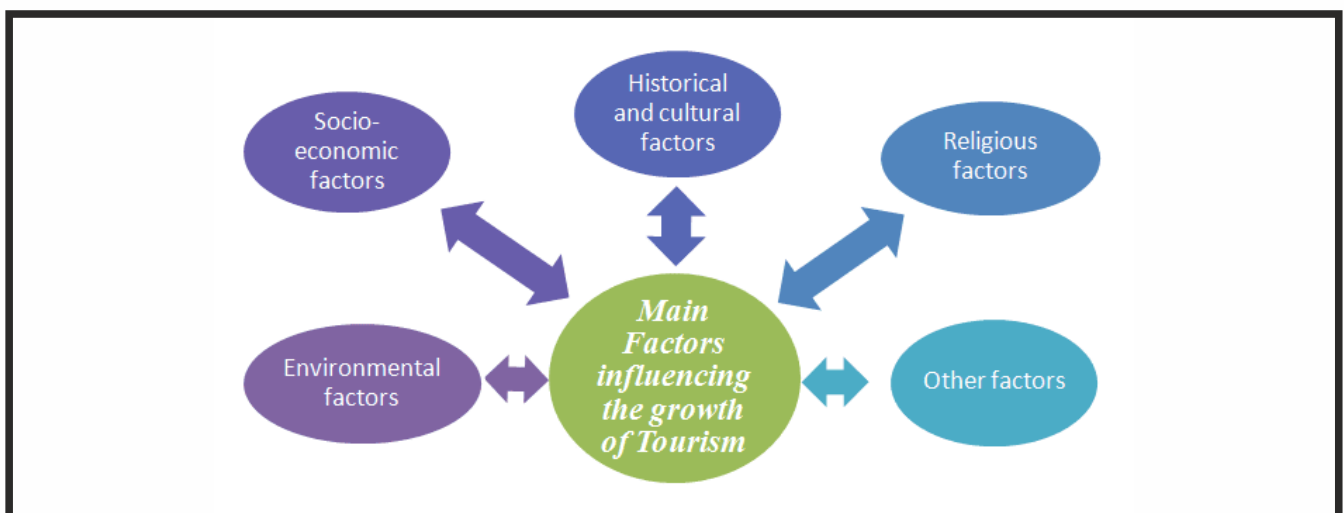
Robust digital connectivity in the country is creating a new stream of tourism called stay cation, where working professionals are connected to their workplaces from their stay homes far from the busy lives of metro cities in the “Work from Home” culture. This trend helped the tourism industry a lot to survive during the pandemic and helped in providing livelihood to the people living in these beautiful isolated places.

- **E- Visa Facility to Tourists**

India is extending its e-Visa facility in all the 5 major types of tourist categories such as “e-Tourist Visa”, “e- Medical Visa”, “e- Medical Attendant Visa”, “ e-Business Visa”, and “ e-Conference Visa”. The facility is till now extended to 171 countries across the world and helped India to attract foreign tourists to the country.

Thus, the overall scenario is working in favour of the tourism industry in India but the growth will be seen over time. During this phase, the industry will also need to answer some of the major challenges in the future such as the severity of the next wave of Covid 19, future travel restrictions in the country as well as in the world due to the same, etc.

But the continuous development of infrastructure, fibre optic penetration on remote villages, maintenance of peace, law and security will prepare and strengthen the growth of this sector in the country and help India to showcase its valuable heritage and culture to present before the new normal world post-pandemicworld.



Factors influencing Tourism

4. Investment Opportunities and International Outlook

India bags the third position in the globe when it comes to investment in the sector. As investment is the core of developing the tourism industry of any country hence India too provides measurable investment to strengthen the backbone of the tourism industry such as tourism construction, luxury hotels, stays, etc. To fulfil these requirements and to grow the sector beyond its potential, the government infused Rs 2400 crores in the Indian tourism sector which accounts for an 18.42% increase from the previous year's budget allocation.

Out of the total allocation, the government is going to develop the infrastructure-related tourism and allied activities with Rs 1664 crores. The rest of the Rs 1181.30 crore will be allocated to the implementation of the Swadesh Darshan Scheme of the Government of India. The scheme is designed to boost the thematic circuit-based tourism to small and unexplored destinations of India.

The Indian government has also allowed 100% Foreign Direct Investment(FDI) through automatic routes for the tourism industry as well as tourism construction related projects such as the building of hotels, resorts, etc. As per the government records, India has attracted around US\$ 16 billion worth of FDI inflow in the Hotel & Tourism Sector during the financial year 2020-2021.

Along with this, the government also provides a 5-year tax holiday offer to the hotels in 2,3 and 4-star category around UNESCO World Heritage Sites (except Delhi and Mumbai) to encourage tourism construction in the vicinity and attract tourists. The cruise sector in India is also showing positive attraction from tourists and thus finding many private players to invest in the sector in the coming 5 years such as Dream Hotel Group's investment of US\$ 300 million in the cruise services.

As the Indian government has been working religiously to revive the water transport in the country, which is going to increase the tourist's attraction towards the cruise service and make it a 1.2 million market by 2030. For the purpose government has a plan for investment in 5 new river links too. On the same line, India is also witnessing some new emerging subcategories of tourism like Rural Tourism, Film Tourism, Sustainable Tourism, etc.

In the year 2019, the sector has recorded as the highest source of earning of foreign exchange for India and booked a profit of US\$ 29.962 billion. It was the 4.8% rise in foreign exchange earnings in comparison to the previous year.

Due to the large population, diversity, and rich heritage, India is always one of the first choices for attracting private as well as international investments. As Marriott International owned, Westin Hotels & Resorts are planned to invest in Goa last year, which is a popular destination among international as well as domestic tourists due to its beautiful scenic beaches and adventure sports.

All this makes India, the 8th largest tourism economy in the globe, attracting the major investment players and creating a world-class tourism destination by utilizing its strategic, natural, coastal, and traditional treasures.

5. Response to Covid-19 Pandemic and Recovery Scenario

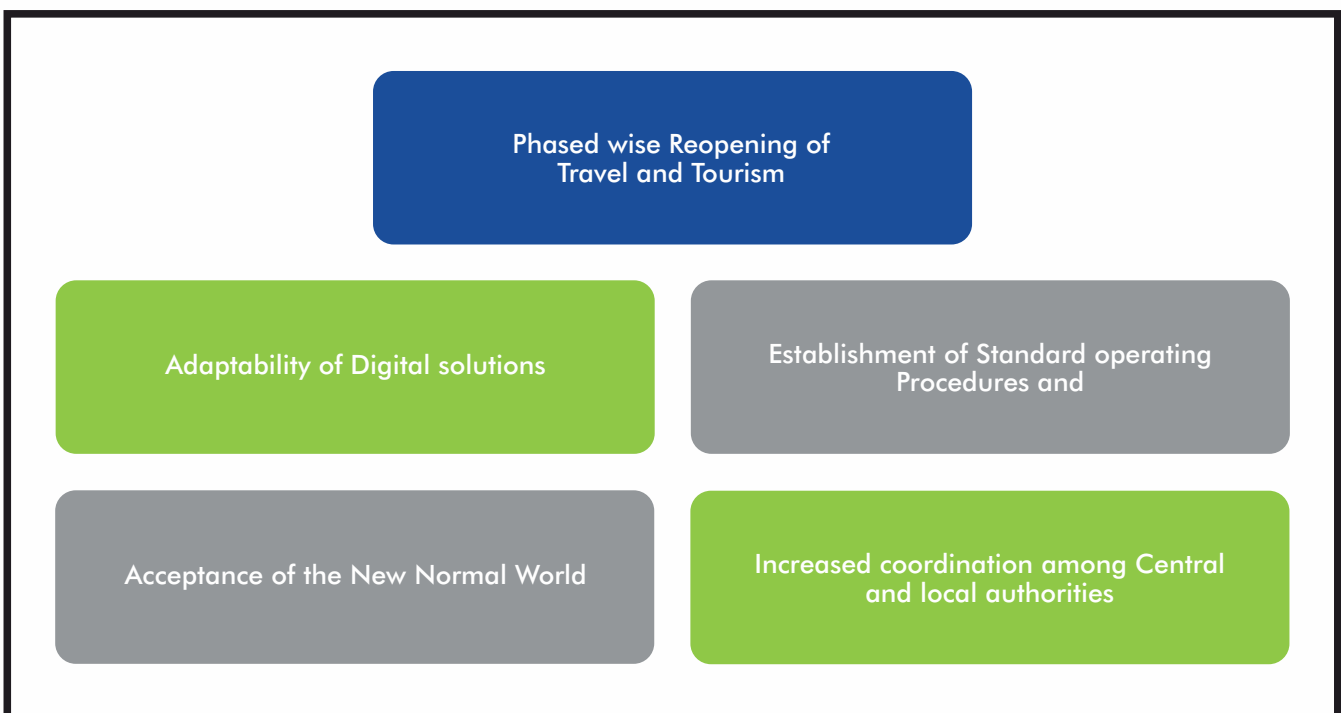
The Covid 19 pandemic has disrupted world tourism in an unprecedented way. It has put the world at a standstill for any major economic activity and thus hampered the tourism industry at large. During the first wave when all the domestic and international travels were banned, the scenario has given a major shock to the people involved in the industry which was otherwise the most dynamic sector of the Indian economy and world too.

India being a developing nation majorly depends on the tourism sector for employment, foreign exchange earnings, and massive tax collections. But during the pandemic phase, as per the estimation, in India around 40 million jobs were lost and recorded the total US\$ 17 billion loss in the revenue. India has also recorded the loss of 66.4% of international tourists in march 2020 as compared to the same month of the previous year.

The shock was up to some extent supported by domestic tourists after the first wave in which Indian healthcare has proved its efficiency and robustness. During the relaxation, the government has facilitated domestic and international tourists through various provisions such as the planned resumption of domestic and international flights through different agreements such as Air Bubble and e- Tourist Visas. This helped the Indian tourism Industry to attract regional tourism in South Asian countries.

In India, the recovery of the Indian tourism industry was seen as systematic and well planned, in which digital accessibility played the central role to establish the framework and helped in the revival of the Indian tourism industry sustainably from the shock of the Covid 19 pandemic.

Sustainable Recovery Framework for Indian Tourism Industry



The social, economic, and cultural loss during the pandemic was on high as the travel and tourism activities were taken the back seat but after the second wave of the deadly virus along with fast-paced vaccination drives, Indian tourism got new energy in the disguise. The government's schemes like Swadesh Darshan through IRCTC has provided new hopes to the Indian tourism industry as well.

During this time, the Hotel industry in India has also booked the loss of more than Rs 130 lakh crore revenue in the financial year 2021 but looking forward to a great recovery in the times ahead. The government's plan to provide a one-month free tourist visa to 5

lakh international tourists till 31st March 2022 through a centrally sponsored scheme and joints initiatives such as SAATHI (System for Assessment & Training for Hospitality Industry) to check for the effective implementation of Covid 19 guidelines for operations of hotels, restaurants, etc give them positive hope for this revival.

Thus, Indian tourism with strong determination and agility is ready to bounce back and the overcrowding on Indian hills and other tourist destinations during Christmas and New Year vacations have shown the way forward. The less severity of the third wave of Covid 19 in India has kept the momentum of the Indian tourism Industry unfaded.

These positive trends have put a smile on the face of many poor families who solely find their livelihood through tourism. As it will help to get them on to their normal life soon by welcoming a rising number of tourists with open hearts and wide smiles. No doubt the shock was deep and still on the path of recovery but the government's reform policies and enthusiasm of tourists will bring back the golden old days of the Indian tourism industry soon.



6. Government Initiatives: Reinventing the Power of Tourism in India

The Government of India has a strong vision to formulate effective policies for the rejuvenation and revival of Indian tourism. Every initiative and policy framework of the government is a step forward toward this golden aim set for India as to make it a top attraction for international tourists and increase the domestic tourists on popular and unexplored tourist destinations of India.

This will develop a Keenerview of local tourists to explore their own country with a new perspective and leverage the hidden potential of a large population base for its economic benefit. The government is working religiously to create opportunities to unwrap the Indian tourism potential in all the ways possible and work on the uniqueness of Indian culture and society.

The government's decision to appoint “Tourist Officers” under the subdivision offices of 20 Indian embassies over the globe is such a prudent step inching towards attracting international tourists and will facilitate tourism from these countries. Hence, it is working to promote Rural Tourism, Iconic Tourism Destinations, launching the scheme for providing safe tourist destinations for women., and making all the tourist destinations across the country accessible to all. So that people with disabilities can also explore the beauty of India.

Through draft tourism policy, 2020 the government is set to explore its soft power and self-reliance for the growth of the Indian tourism industry. Some of the major government initiatives which are reinventing the definition of 21st-century tourism in India with a holistic and inclusive vision to project it as a global hub of tourism are as under:

- **Swadesh Darshan Scheme:**

The initiative is launched in 2014-15 to enhance opportunities for tourists to explore lesser-known destinations in India along with popular ones with enriched travel experiences. This flagship programme also finds a distinct allocation of Rs 1181.30 crore under the Government of India Budget 2022-23. Under this scheme, Central Financial Assistance has been provided to states and Union Territories for the infrastructure development of the designated circuits.

- **National Integrated Database of Hospitality Industry (NIDHI)**

A joint initiative of Indian Central and state governments to tap the potential of Atmanirbhar Bharat through leveraging the benefit of technology for the hospitality industry, which has a fair share in tourism of India. Through this initiative, the government is planning to create a database of the hospitality industry and use it as a gateway for the various stakeholders. The digital platform will soothe the delivery of services and benefits to Hotels, Homestays, Resorts, etc and enhance the ease of doing business in the industry.

- **Ek Bharat Shreshtha Bharat**

This unique programme of the Ministry of Tourism is developed to enhance the synergy and interaction between the people of various states and Union Territories across the nation through

the pairing with each other. Even during the Covid 19 various activities under this programme has taken place and truly developed the spirit of “Ek Bharat Shreshtha Bharat” among their enthusiastic members.

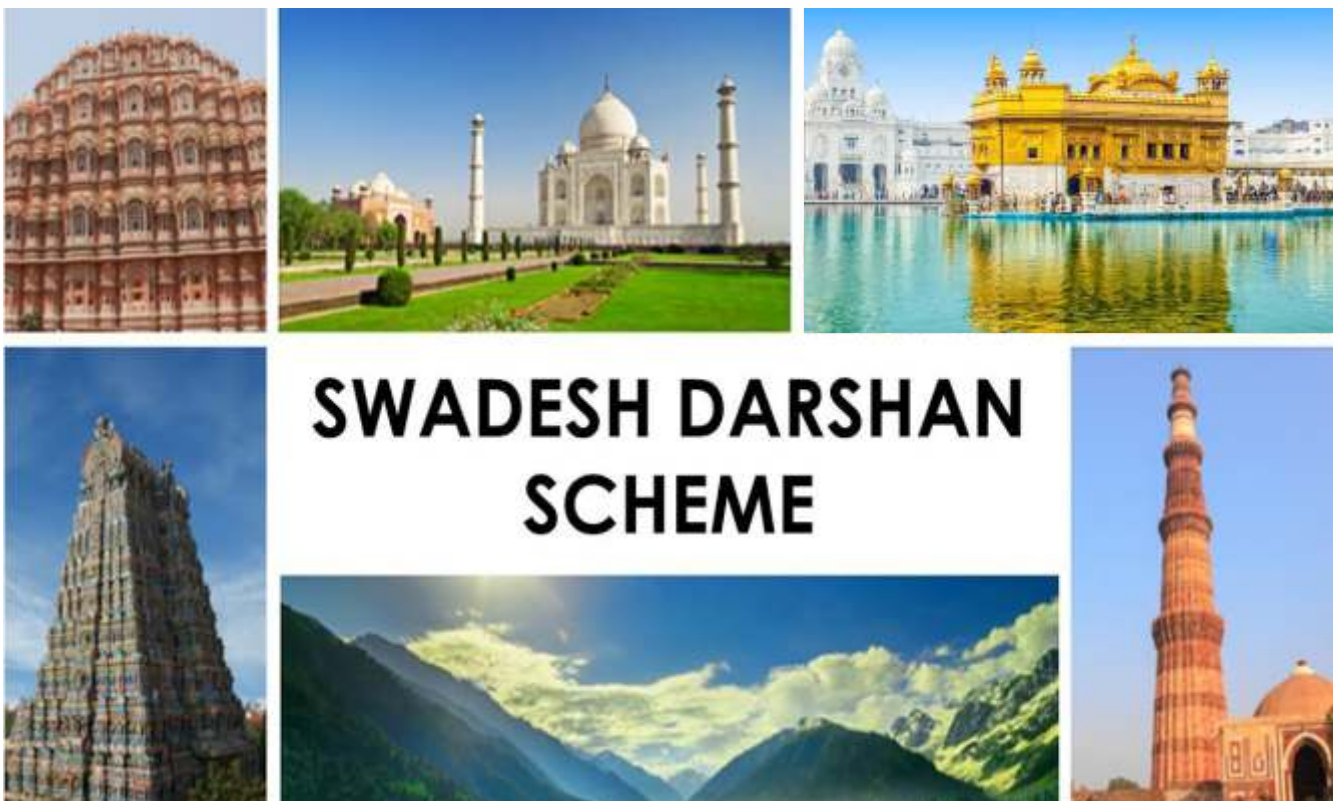
- **National Mission on Pilgrimage Rejuvenation and Spiritual Heritage Augmentation Drive (PRASHAD)**

The mission is launched by the Ministry of Tourism in 2014-15 with the view of developing the pilgrimage and heritage sites of India holistically. Under this, the ministry has identified 57 such sites in the country. The development of these religious sites will include well-planned sustainable infrastructure development in and around the site and help in tapping the domestic tourists with enhanced tourism experiences.

- **“Dekho Apna Desh” Initiative**

The initiative is launched by the Ministry of Tourism in 2019-20 during the pandemic to create awareness among the Indian citizens about the rich and diverse culture and heritage of the country and promote domestic tourism to revive the industry from the shock of Covid 19. Under this campaign, the enthusiastic travellers are asking to pledge to visit not less than 15 destinations of the country by 2022 and to create awareness about the campaign ministry has organized several webinars and quizzes to educate and showcase travellers about the rich heritage and culture of India.

All these consistent efforts and policy initiatives of the government have helped the tourism industry in India to expand its boundaries beyond borders and also be hopeful; in the testing times of Covid 19. The financial support under the relief package and plan to provide free tourists visa to 5 lakh travellers has also helped in stimulating the economic growth of the sector and providing strength to come out stronger and more optimistic.



7. Conclusion

The tourism industry being one of the highest contributors to the Indian economy has faced an unparalleled downfall during the Covid 19 pandemic but the timely measures are taken by the government and enthusiastic response of the domestic tourists after the first two waves have set the expectations of Indian tourism industry at all high.

The industry is all set to return to business in the new normal world with all the safety precautions and Covid 19 health guidelines. The fast pace of vaccination in the country has also set the momentum for the tourism industry in the right direction.

The measures taken by the government are also helping to provide liquidity in the hands of tourists and thus energising the operations of the tourism industry and hitting the estimated target of RS 12.68 trillion GDP contribution by 2028. The positive trends are helpful to see the happy faces of local artisans and people on the mountains and isolated tourist destinations once again while welcoming their dear travellers and tourists way warmer than before.

This difficult time of pandemic has shown the beautiful, rich, and historical facet of India to their domestic travellers and inculcated the urge of travelling in one and all due to these unprecedented restrictions and social distancing. It helped India to find and tap its unmatched potential of domestic tourism along with international tourist enthusiasts and presented a new ray of hope for the shining future of sustainable and technology-enabled Indian tourism at the global level.



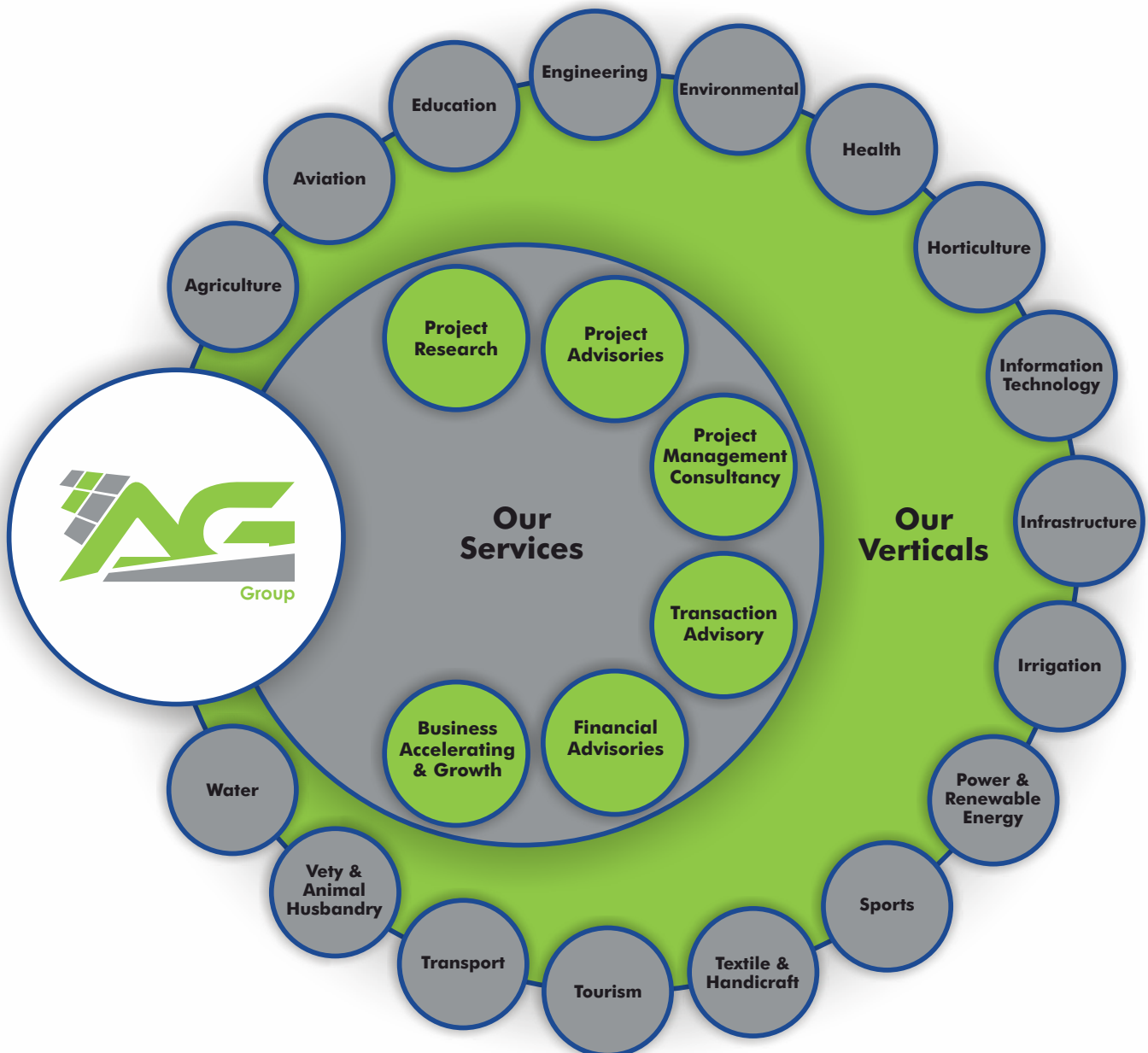
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