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Indian Metropolitan Cities Real Estate Market Outlook to 2016

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Abstracts

EXECUTIVE SUMMARY

The report titled “Indian Metropolitan Cities Real Estate Outlook to 2016 ” provides a comprehensive analysis of the various aspects such as market size of the real estate industry and segments such as residential, commercial, retail and the hotel across the top seven metropolitan cities in India. The report covers the absorption and supply of real estate properties in the major cities in India as well as the rental and capital values and the vacancy rates of the key real estate properties in the major cities.

The residential segment has been one of the major contributors of growth to the real estate market in India. This segment of the market was up-held by the rising domestic demand for residential units over the years. The residential launches across major cities fell by ~% to ~ units in 2Q2012. Mumbai witnessed the steep fall of ~% of the new residential launches followed by Bengaluru and Chennai. However, Pune and Hyderabad recorded an increase in the new launches of residential units during the quarter.

The Indian commercial real estate market has recorded a considerable growth in the supply of the commercial real estate properties over the years. The commercial real estate market supply has increased from ~ thousand square meter of GFA in 2005 to ~ thousand square meter of GFA in 2011, growing at a CAGR of 11.7%. The demand for office space however, slowed down significantly in the major metro cities in the first quarter of 2012 with around ~ thousand square meters of space getting absorbed. Delhi- NCR, Mumbai, Chennai and Bengaluru accounted for ~% of the major space absorbed.

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The Indian retail real estate underwent a drastic change in the recent years. There has been an influx of several international brands in the country which has given a boost to the retail sector. It was observed that the new completion of malls increased significantly in 2011 as compared to 2010 due to several big projects becoming operational in 2011. The segment amplified in 2011 during which the new launch of retail real estate properties increased to ~ thousand square meters as compared to ~ thousand square meter space launched in 2010.

The major metropolitan cities in the country witnessed an increased transaction activity and retailer expansion in 1H 2012 with leading brands and retailers pursuing their expansion plans aggressively. It was observed that the rentals in the retail malls increased in cities such as Delhi whereas cities such as Bengaluru, Pune and Mumbai witnessed an incline in rentals for the high streets during 1H 2012.

The Indian hotel real estate market has grown at a CAGR of 2.5% during 2005-2011. The availability of hotel rooms in India increased from ~ in 2010 to 136,229 rooms in 2011 registering a growth of 15.6% during the period. The hotel room space supply has also been on an upswing over the years. The supply has increased from ~ thousand square meters of GFA in 2005 to ~ thousand square meters of GFA in 2011 thereby growing at a CAGR of 2.5% over the period.

KEY TOPICS COVERED IN THE REPORT

The market size of the Real Estate industry in India.

The market size of real estate market segments such as commercial and retail on the basis of new units launched and absorbed.

The market size of the real estate segments such as residential on the basis of new units completed and space supply.

The market size of the real estate segments such as the hotel on the basis of availability of hotel rooms units and space supply.

The market segmentation of the hotel industry on the basis of major cities, type of hotel and premium hotel rooms.

Trends and Development of the real estate industry in India.

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Market share of major players in the real estate industry in India and a detailed company profiles of major players.

Future outlook and projections of real estate industry market segments- residential, commercial, retail and the hotel.

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