

# **Affordable Housing Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Providers (Government, Private Builders, Public-Private Partnership), By Income Category (EWS, LIG, MIG), By Size of Unit (Up to 400 square feet, 400-800 square feet, Above 800 square feet), By Location (Metro, Non-Metro), By Population (Slum Population, Non-Slum Population), By Region, Competition, 2018-2028**

<https://marketpublishers.com/r/A7E91AFE464CEN.html>

Date: November 2023

Pages: 190

Price: US\$ 4,900.00 (Single User License)

ID: A7E91AFE464CEN

## **Abstracts**

Global Affordable Housing Market was valued at USD 210.41 Billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 8.78% through 2028.

Affordable housing refers to residential properties or dwellings that are reasonably priced and within financial reach of a significant portion of a given population, typically those with moderate to low incomes. The primary objective of affordable housing is to ensure that individuals and families can secure safe, decent, and stable places to live without experiencing excessive financial strain.

Key characteristics of affordable housing include:

**Cost Accessibility:** Affordable housing units are designed to be affordable for individuals or families with incomes that fall below the median for a specific area. The cost of these units is typically set at a percentage of the household's income to ensure affordability.

**Government or Subsidy Support:** Often, affordable housing is made possible through government subsidies, incentives, or partnerships with developers. These initiatives aim to bridge the gap between market-rate housing costs and what lower-income individuals can afford.

**Quality and Safety Standards:** Affordable housing must meet minimum quality and safety standards to ensure that residents have access to habitable and secure living spaces.

**Long-term Affordability:** Affordable housing projects often have mechanisms in place to maintain their affordability over the long term, preventing rent or mortgage costs from escalating beyond what low and moderate-income households can manage.

**Inclusivity:** Affordable housing is designed to be inclusive, accommodating individuals and families from diverse backgrounds and income levels, fostering economic and social diversity within communities.

Affordable housing plays a critical role in addressing homelessness, reducing housing inequality, and promoting economic stability. It contributes to better living conditions, improved educational outcomes, and increased overall well-being for those who might otherwise struggle to secure adequate housing in a competitive real estate market.

## Key Market Drivers

### Urbanization and Population Growth

Urbanization and population growth are significant drivers of the global affordable housing market. As the world's population continues to expand, more people are moving to cities in search of economic opportunities, better living conditions, and improved access to amenities and services. This rapid urbanization places immense pressure on housing markets, leading to increased demand for affordable housing options. In many urban areas, the demand for housing far outpaces the supply, causing housing prices to soar, making it challenging for low and middle-income individuals and families to find affordable homes. Governments and private developers are increasingly recognizing this trend, which drives initiatives and investments in affordable housing projects to accommodate the growing urban population.

### Government Initiatives and Policies

Government initiatives and policies aimed at addressing housing affordability are crucial drivers of the global affordable housing market. Many governments worldwide are actively engaged in programs designed to promote affordable housing development. These initiatives include subsidies, tax incentives, and regulatory reforms that encourage the construction of affordable homes. For instance, governments may offer financial incentives to developers who build affordable housing units or provide direct subsidies to low-income individuals and families to help them access housing. In some cases, zoning and land use regulations are modified to facilitate the construction of affordable housing projects. These policy-driven efforts play a pivotal role in expanding the availability of affordable housing options.

### Housing Finance Innovations

Innovations in housing finance contribute significantly to the growth of the global affordable housing market. Access to affordable financing options is a key factor in enabling individuals and families to purchase or rent homes. The development of innovative financial products and services tailored to the needs of low and middle-income households has made homeownership and affordable rental housing more attainable. Microfinance, community-based lending, and housing cooperatives are examples of such innovations. Additionally, the rise of financial technology (FinTech) companies has led to the creation of digital platforms that simplify the mortgage application process and offer competitive interest rates. These advancements in housing finance expand access to affordable housing opportunities.

### Sustainable Building Practices

Sustainable building practices are emerging as a driver of the global affordable housing market. As concerns about climate change and environmental sustainability grow, there is a growing emphasis on constructing affordable housing that is energy-efficient, environmentally friendly, and cost-effective to maintain. Builders are increasingly using green building materials and energy-efficient technologies to reduce the long-term operating costs of affordable housing units. This not only benefits residents by lowering utility bills but also reduces the carbon footprint of these structures. Government incentives and certification programs, such as LEED (Leadership in Energy and Environmental Design), further encourage the adoption of sustainable building practices in the affordable housing sector.

### Public-Private Partnerships (PPPs)

Public-private partnerships (PPPs) are a driving force in the global affordable housing market. These collaborations between governments and private sector entities leverage the strengths of both sectors to increase the supply of affordable housing. PPPs often involve the development of mixed-income housing projects, where a portion of the units is reserved for low and middle-income residents. These partnerships allow governments to access private sector expertise, funding, and resources, while private developers benefit from government support and incentives. PPPs have proven successful in numerous regions, helping bridge the affordability gap by delivering quality housing options to a wider range of income groups.

### Technological Advancements in Construction

Technological advancements in construction methods and materials are driving innovation in the global affordable housing market. New construction technologies, such as 3D printing, modular construction, and prefabrication, are revolutionizing the speed and cost-effectiveness of building affordable housing units. These technologies enable faster construction times and reduced labor costs, making affordable housing more economically viable. Additionally, advancements in building materials, such as lightweight and durable alternatives, contribute to cost savings and the overall quality of affordable housing. The integration of smart home technologies further enhances the value and appeal of affordable housing units, making them more attractive to potential residents.

In summary, the global affordable housing market is influenced by a combination of demographic shifts, government policies, financial innovations, sustainability efforts, public-private partnerships, and technological advancements. These drivers collectively contribute to the ongoing growth and development of affordable housing options worldwide, addressing the critical need for accessible and reasonably priced housing for diverse populations.

### Government Policies are Likely to Propel the Market

#### Subsidies and Grants for Affordable Housing

Subsidies and grants are fundamental government policies aimed at promoting affordable housing. These programs provide financial assistance to developers and low-income individuals or families to make housing more affordable. Developers can receive subsidies to offset construction costs for affordable housing projects, allowing them to offer lower rents or sale prices. Meanwhile, low-income households may receive grants

or subsidies to reduce their housing expenses, making homeownership or rental more feasible. These government policies play a crucial role in bridging the affordability gap, ensuring that housing remains accessible to a broader spectrum of the population.

### Incentives for Affordable Housing Development

Governments incentivize the construction of affordable housing through various means. Tax incentives, such as tax credits or exemptions, encourage developers to invest in affordable housing projects. These incentives can offset the costs associated with building affordable units and stimulate private sector involvement. Additionally, regulatory incentives, like streamlined permitting processes or density bonuses, can reduce development barriers and encourage the creation of more affordable housing units. Governments often collaborate with developers to define criteria for receiving these incentives, ensuring that affordable housing goals are met.

### Affordable Housing Zoning and Land Use Regulations

Zoning and land use regulations play a pivotal role in shaping the availability of affordable housing. Government policies can facilitate the development of affordable housing by allowing for higher-density housing in certain areas, rezoning land for mixed-income housing, or simplifying land use approvals for affordable projects. These policies promote a more equitable distribution of housing options within communities, preventing the concentration of poverty in specific areas and fostering socio-economic diversity.

### Rent Control and Rent Stabilization

Rent control and rent stabilization are government policies designed to protect tenants from excessive rent increases. Rent control sets maximum rent levels that landlords can charge, while rent stabilization limits the annual rent increase a landlord can impose on tenants. These policies are often implemented in high-cost urban areas to prevent the displacement of long-term residents due to skyrocketing rents. While they aim to make housing more affordable for tenants, they can also impact landlords' returns and may require balancing tenant protection with incentives for property maintenance and development.

### Inclusionary Housing Requirements

Inclusionary housing policies mandate that a certain percentage of units in new residential developments be designated as affordable. Developers are typically required

to include these affordable units as part of their projects or contribute to an affordable housing fund. These policies ensure that affordable housing is integrated into new developments, contributing to socio-economic diversity and mitigating housing shortages. However, they can also pose challenges to developers in terms of project feasibility and profitability.

### Housing Vouchers and Rental Assistance Programs

Housing vouchers and rental assistance programs are government policies designed to help low-income individuals and families afford housing in the private rental market. These programs provide direct financial aid to eligible households, allowing them to choose suitable housing units while paying a reduced portion of their income toward rent. By providing subsidies directly to tenants, these policies empower individuals and families to seek housing in areas of their choice, promoting housing stability and reducing homelessness.

In conclusion, government policies in the global affordable housing market encompass a wide range of initiatives, including subsidies, incentives, zoning regulations, rent controls, inclusionary housing requirements, and rental assistance programs. These policies aim to address the housing affordability crisis by supporting both the supply and demand sides of the housing market, ultimately striving to ensure that safe and affordable housing is accessible to all segments of society.

### Key Market Challenges

#### Rapid Urbanization and Population Growth

One of the foremost challenges facing the global affordable housing market is the rapid pace of urbanization and population growth. As more people migrate from rural to urban areas in search of better economic prospects and improved living standards, cities around the world are experiencing unprecedented growth. This demographic shift exerts immense pressure on urban housing markets, driving up demand for housing units. The scale of this challenge is significant. According to the United Nations, the global urban population is expected to reach 68% by 2050, up from 55% in 2018. This translates to an additional 2.5 billion urban residents over the next three decades, primarily in developing countries. As urban areas expand, the demand for affordable housing intensifies, leading to rising property prices and rents. The consequences of this urbanization challenge are far-reaching. Low and middle-income households often find themselves priced out of housing markets, struggling to secure affordable homes near



employment centers and essential services. Overcrowding, informal settlements, and homelessness become more prevalent as a result. This not only contributes to social inequality but also strains urban infrastructure and services. Governments, developers, and urban planners must grapple with the complexities of accommodating this growing urban population while ensuring that housing remains affordable. Innovative solutions, including sustainable urban planning, public-private partnerships, and the development of affordable housing in peri-urban areas, are critical to addressing this challenge.

### Limited Access to Financing for Affordable Housing

Access to financing for affordable housing is a pervasive challenge in the global market. Many low and middle-income individuals and families lack the financial resources and creditworthiness to secure affordable housing through traditional mortgage or rental channels. This access gap creates barriers to homeownership and quality rental housing, perpetuating the cycle of housing instability.

Several factors contribute to this challenge:

**Credit Constraints:** Low-income individuals often have limited access to formal credit markets. Lenders may perceive them as high-risk borrowers, making it difficult for them to secure mortgage loans at favorable terms.

**Insufficient Savings:** Many potential homebuyers struggle to amass the necessary down payments and closing costs required for homeownership, especially in high-cost urban areas.

**Limited Rental Assistance:** Rental assistance programs and housing vouchers, which can alleviate the financial burden of renting, are often oversubscribed, leaving many eligible individuals and families on waitlists or without assistance.

**Lack of Affordable Financing Products:** Financial institutions may not offer suitable and affordable loan products tailored to the needs of low and middle-income homebuyers or developers seeking to build affordable housing.

**Regulatory Barriers:** Stringent lending regulations and high transaction costs can further deter affordable housing financing.

Addressing the limited access to financing for affordable housing is essential to expanding housing options for vulnerable populations and reducing housing inequality.

Governments and financial institutions must collaborate to develop innovative financing solutions, such as microfinance, community land trusts, and housing cooperatives, which can empower low and middle-income individuals and families to access safe and affordable housing. Additionally, measures like rental subsidies and interest rate subsidies can help bridge the affordability gap for renters and buyers alike.

In conclusion, the global affordable housing market faces substantial challenges driven by rapid urbanization and population growth, as well as limited access to financing for housing. These challenges require coordinated efforts from governments, the private sector, and civil society to develop innovative and sustainable solutions that ensure housing remains accessible and affordable for all.

## Segmental Insights

### Metro Insights

The metro segment had the largest market share in 2022 and is expected to dominate the market during the forecast period. Metro location analysis for the global affordable housing market involves assessing various metropolitan areas around the world to determine their suitability for affordable housing development. Several factors come into play when evaluating metro locations for affordable housing initiatives.

**Demand and Population Growth:** Evaluate the current population and projected population growth in the metro area. High population growth often indicates increased demand for housing.

**Economic Conditions:** Analyze the local job market, income levels, and employment opportunities. Areas with stable or growing economies are more likely to support affordable housing initiatives.

**Housing Affordability Gap:** Determine the gap between the average housing costs (rent or mortgage) and the income levels of residents. A larger affordability gap suggests a greater need for affordable housing.

**Land Availability and Costs:** Assess the availability of suitable land for housing development and the cost of land acquisition. Lower land costs can make affordable housing projects more feasible.

**Government Policies and Incentives:** Research the local and national government's



policies and incentives for affordable housing development. Some governments offer tax breaks, subsidies, or streamlined permitting processes.

**Infrastructure and Transportation:** Consider the availability and quality of infrastructure, including roads, public transportation, and utilities. Good transportation options can make suburban or peri-urban areas viable for affordable housing.

## Government Insights

The Government segment had the largest market share in 2022 and is expected to dominate the market during the forecast period. Governments across the world allocate substantial funds to support affordable housing projects. These funds are often used to provide subsidies, grants, and low-interest loans to developers and homebuyers. The level of government funding varies from country to country, with some nations investing heavily in affordable housing, while others may allocate fewer resources. Governments implement regulations and policies that govern the construction, financing, and management of affordable housing. These regulations ensure that affordable housing meets certain quality standards and remains affordable for the target population. They also dictate income limits for eligibility and other criteria for affordable housing programs. Many governments offer tax incentives to encourage private developers to invest in affordable housing. These incentives may include tax credits, exemptions, or deductions for developers who commit to building a certain number of affordable housing units. Governments often collaborate with private sector entities to address the affordable housing shortage. Public-Private Partnerships (PPPs) can be a powerful tool for delivering affordable housing projects efficiently. Governments may provide land or funding, while private developers bring expertise and resources to the table. In some countries, governments subsidize interest rates on home loans for low-income individuals or families. This makes homeownership more affordable by reducing the cost of borrowing. Government land policies can have a significant impact on the availability of affordable housing. Some governments reserve land specifically for affordable housing developments, while others may provide land at reduced costs to developers who commit to building affordable units. Governments are increasingly emphasizing the importance of energy-efficient and sustainable affordable housing. They may offer incentives or grants to developers who incorporate green building practices and technologies into their projects.

## Regional Insights

The Asia Pacific region is the largest market for affordable housing, accounting for more

than 50% of the global market. The demand for affordable housing in the region is driven by rapid urbanization, the growing middle class, and the rising income inequality.

North America is the second largest market for affordable housing, accounting for about 25% of the global market. The demand for affordable housing in the region is driven by the rising cost of housing, the growing number of millennials, and the increasing number of single-parent households.

Europe is the third largest market for affordable housing, accounting for about 15% of the global market. The demand for affordable housing in the region is driven by the aging population, the rising cost of housing, and the lack of affordable housing options in many areas.

### Key Market Players

Dominium

Related Group

LDG Development

Tata Projects

Pennrose

The NRP Group

Prestige Group

Skanska AB

Jonathan Rose Companies LLC

Equity Residential

### Report Scope:

In this report, the Global Affordable Housing Market has been segmented into the following categories, in addition to the industry trends which have also been detailed

below:

Affordable Housing Market, By Providers:

Government

Private Builders

Public-Private Partnership

Affordable Housing Market, By Income Category:

EWS

LIG

MIG

Affordable Housing Market, By Size of Unit:

Up to 400 square feet

400-800 square feet

Above 800 square feet

Affordable Housing Market, By Location:

Metro

Non-Metro

Affordable Housing Market, By Population:

Slum Population

Non-Slum Population

Affordable Housing Market, By Region:

North America

Europe

South America

Middle East & Africa

Asia Pacific

### Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Affordable Housing market.

### Available Customizations:

Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

### Company Information

Detailed analysis and profiling of additional market players (up to five).

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    - 12.2.6.4.2.3. By Size of Unit
    - 12.2.6.4.2.4. By Location
    - 12.2.6.4.2.5. By Population
- 12.2.6.5. Australia Affordable Housing Market Outlook
  - 12.2.6.5.1. Market Size & Forecast
    - 12.2.6.5.1.1. By Value
  - 12.2.6.5.2. Market Share & Forecast
    - 12.2.6.5.2.1. By Providers
    - 12.2.6.5.2.2. By Income Category
    - 12.2.6.5.2.3. By Size of Unit
    - 12.2.6.5.2.4. By Location
    - 12.2.6.5.2.5. By Population

## **13. MARKET DYNAMICS**

13.1. Drivers

13.2. Challenges

## **14. MARKET TRENDS AND DEVELOPMENTS**

## **15. COMPANY PROFILES**

15.1. Prologis Inc

15.1.1. Business Overview

15.1.2. Key Revenue and Financials

15.1.3. Recent Developments

15.1.4. Key Personnel

15.1.5. Key Product/Services Offered

15.2. IndoSpace

15.2.1. Business Overview

15.2.2. Key Revenue and Financials

15.2.3. Recent Developments

15.2.4. Key Personnel

15.2.5. Key Product/Services Offered

15.3. ESR Group

15.3.1. Business Overview

15.3.2. Key Revenue and Financials

15.3.3. Recent Developments

15.3.4. Key Personnel

15.3.5. Key Product/Services Offered

15.4. Mapletree Investments Pte Ltd,

15.4.1. Key Revenue and Financials

15.4.2. Recent Developments

15.4.3. Key Personnel

15.4.4. Key Product/Services Offered

15.5. A.P. Moller-Maersk Group

15.5.1. Business Overview

15.5.2. Key Revenue and Financials

15.5.3. Recent Developments

15.5.4. Key Personnel

15.5.5. Key Product/Services Offered

15.6. Kuehne + Nagel Management AG



- 15.6.1. Business Overview
- 15.6.2. Key Revenue and Financials
- 15.6.3. Recent Developments
- 15.6.4. Key Personnel
- 15.6.5. Key Product/Services Offered
- 15.7. CEVA Logistics SA
  - 15.7.1. Business Overview
  - 15.7.2. Key Revenue and Financials
  - 15.7.3. Recent Developments
  - 15.7.4. Key Personnel
  - 15.7.5. Key Product/Services Offered
- 15.8. Nippon Express
  - 15.8.1. Business Overview
  - 15.8.2. Key Revenue and Financials
  - 15.8.3. Recent Developments
  - 15.8.4. Key Personnel
  - 15.8.5. Key Product/Services Offered
- 15.9. Genco Distribution System Inc
  - 15.9.1. Business Overview
  - 15.9.2. Key Revenue and Financials
  - 15.9.3. Recent Developments
  - 15.9.4. Key Personnel
  - 15.9.5. Key Product/Services Offered

## **16. STRATEGIC RECOMMENDATIONS**

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