

AFFORDABLE HOUSING MARKET IN INDIA 2019

Progress so Far, Recent Developments, New Projects and Future Outlook

- ❖ Report (PDF)
- ❖ Data-set (Excel)

Affordable housing is emerging as one of the fastest growing segments in the real estate sector. The past few years have seen a sharp rise in project uptake as well as private sector interest in the segment. Much of this interest has been driven by the government's proactive approach towards this segment in the form of policy impetus, financial incentives and investments. The government has continued its thrust on the sector in the recently announced Union Budget 2019 as well. Besides pushing for an expeditious implementation of Housing for All by 2022 mission, the government has also proposed reforms to promote rental housing in the country. In the past, measures such as a new PPP policy, tax exemptions, and sops for private investments have also been introduced to make the sector more lucrative for developers. With spotlight on low-cost housing, there has been a growing focus on the deployment of new and innovative technologies, designs and materials. With all these developments, the sector offers significant opportunities for private developers, financiers, contractors, and technology and equipment suppliers.

Executive Summary

SECTION I: HOUSING MARKET: TRENDS, DEVELOPMENTS, PROJECTIONS AND OPPORTUNITIES

1. Affordable Housing Segment Overview

- ❖ Urbanisation and Demographic Trends
- ❖ Current Market Size
- ❖ Trends in Supply and Sales of Affordable Houses
- ❖ Growth Drivers
- ❖ Current Stock of Low Income Housing
- ❖ Recent and Emerging Trends
- ❖ Institutional and Regulatory Structure
- ❖ Outlook and Opportunities

2. Union Budget 2019-20: Announcements and Expected Impact

- ❖ Key Announcements
- ❖ Expected Impact
- ❖ Stakeholder Views
- ❖ Next Steps

3. Policy and Regulatory Developments

- ❖ Infrastructure Status to Affordable Housing
- ❖ Impact of GST
- ❖ Credit Linked Subsidy Scheme
- ❖ RERA Act
- ❖ Affordable Housing in Partnership (AHP) Scheme
- ❖ Other Incentives
- ❖ Industry Expectations & Recommendations*

**This section will be based on interviews with key industry stakeholders.*

4. Housing Demand and Supply Indicators

- ❖ Demand and Supply Gap
 - Overall
 - State-wise
 - Urban and Rural
- ❖ Affordable Housing Demand and Supply
- ❖ Households versus Housing Stock
- ❖ Houses by Habitable Conditions
- ❖ Housing Congestion

5. Future Outlook and Key Projections (till 2024-25)

- ❖ Housing Demand Projections
- ❖ Housing Stock Requirement by 2023-24 (By Region and States)
- ❖ Housing Supply Projections
- ❖ Projected Land Requirement
- ❖ Projections for Material and Equipment Requirements
- ❖ Sector Outlook

6. Project Pipeline and Market Opportunities

- ❖ Overall Project Pipeline
- ❖ Project Pipeline by State
- ❖ By Ownership
 - Central level
 - State level
 - Private Sector Projects
- ❖ By Stage of Development
 - Ongoing
 - Awarded
 - Announced
 - Planned/Proposed
- ❖ Affordable Housing Projects under Smart Cities Mission
- ❖ Segment Outlook
- ❖ Opportunities for Key Stakeholders
 - EPC Contractors
 - Project Developers
 - Technology Providers
 - Material Suppliers
 - Equipment Suppliers
 - Consultants

7. Top Cities for Affordable Housing

- ❖ Ahmedabad
- ❖ Bengaluru
- ❖ Chennai
- ❖ Delhi NCR
- ❖ Hyderabad
- ❖ Kolkata
- ❖ Mumbai
- ❖ Pune
- ❖ Others

(Each city profile will include information on experience in affordable housing, completed and ongoing projects, demographic profile, state of existing infrastructure, upcoming investments, key players, opportunities, etc.)

8. Financing and Investment Scenario

- ❖ Investment Experience
- ❖ Funding Sources
 - Bank Credit/Priority Sector Lending
 - Private Equity/Institutional Investors
 - Bond Market Transactions
 - National Housing Bank
 - Housing Finance Companies/AHFCs
 - Multilateral Funding Agencies
 - Others (ECBs/FDI/CLSS)
- ❖ Expectations from REIT Structures
- ❖ Investment Projections (till 2024-25)
- ❖ Key Challenges

9. Project Economics: Costs, Margins, Returns and Risk Analysis

- ❖ Factors Impacting Project Viability
- ❖ Key Cost Components
- ❖ Profit Margins
- ❖ Trends in Interest Rates and Prices
- ❖ Project IRRs (Historical and Expected)
- ❖ Key Risks and Challenges

10. Material and Equipment Market

- ❖ Demand Drivers
- ❖ Emerging Construction Techniques
- ❖ Building Materials and Equipment Market Size
- ❖ Innovations in Material and Equipment Market
- ❖ Global Best Practices
- ❖ Outlook and Upcoming Opportunities

SECTION II: UPDATE ON GOVERNMENT PROGRAMMES: PROGRESS AND OPPORTUNITIES**11. Progress Report: Housing for All by 2022**

- ❖ Pradhan Mantri Awas Yojana (PMAY) Urban
 - Scope and Objectives
 - Progress So Far - Physical and Financial
 - Investment Requirement
 - Completed and Ongoing Projects
 - Targets and Timelines
- ❖ PMAY Gramin
 - Scope and Objectives
 - Progress So far - Physical and Financial
 - Investment Requirement
 - Completed and Ongoing Projects
 - Targets and Timelines
- ❖ Other Key Programmes

12. Progress and Opportunities under Smart Cities Mission

- ❖ Allocations for Affordable Housing under SCM
- ❖ Experience So Far
- ❖ Key Completed and Under Construction Projects
- ❖ Upcoming Tenders
- ❖ Investment Requirements
- ❖ Market Opportunities under the Mission

SECTION III: FOCUS ON PRIVATE PARTICIPATION**13. PPP Policy: Impact and Benefits**

- ❖ Formats and Models
 - Government land
 - Private land
- ❖ Impact of PPP Policy
- ❖ Incentives and Schemes for PPP
- ❖ Industry Recommendations on Policy Implementation and Incentives

14. Private Sector Experience and Outlook

- ❖ Experience So Far
- ❖ Key Projects (Completed and Under Implementation)
- ❖ Successful Case Studies
- ❖ Innovative Business Models
- ❖ Upcoming Opportunities
- ❖ Segment Outlook

15. Rental Housing Market

- ❖ Size and Growth
- ❖ Policy and Regulatory Scenario
- ❖ Current and Emerging Practices
- ❖ Targets under PMAY
- ❖ State Initiatives
- ❖ Global Models
- ❖ Issues and Challenges
- ❖ Outlook

16. Key Private Player Profiles

- ❖ Arianth Superstructures
- ❖ Design Build Serve
- ❖ Dreams Group
- ❖ Mahindra Lifespaces
- ❖ Panvelkar Group
- ❖ Provident Housing
- ❖ Shapoorji Pallonji
- ❖ Sheltrex
- ❖ Signature Global
- ❖ SNG Group
- ❖ Tata Housing
- ❖ VHBC
- ❖ XRBIA
- ❖ Others/New entrants

(Each profile will include information on company operations, project portfolio-completed and ongoing, upcoming projects, financial performance and future plans)

SECTION IV: STATE-LEVEL SCHEMES, EXPERIENCE AND POTENTIAL**17. Inter-state Comparison**

- ❖ Current Infrastructure
- ❖ Demographics
- ❖ Housing Shortage
- ❖ Key Initiatives
- ❖ Future Plans

18. Key State Profiles

- ❖ Andhra Pradesh
- ❖ Bihar
- ❖ Chhattisgarh
- ❖ Delhi
- ❖ Gujarat
- ❖ Haryana
- ❖ Jharkhand
- ❖ Karnataka
- ❖ Madhya Pradesh
- ❖ Maharashtra
- ❖ Rajasthan
- ❖ Tamil Nadu
- ❖ Telangana
- ❖ Uttar Pradesh
- ❖ West Bengal

(Each state profile will give an overview of the housing scenario, role of key agencies and housing boards, state policy on affordable housing, new initiatives and incentives, and ongoing and upcoming housing schemes/projects.)

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