

AFFORDABLE HOUSING IN INDIA

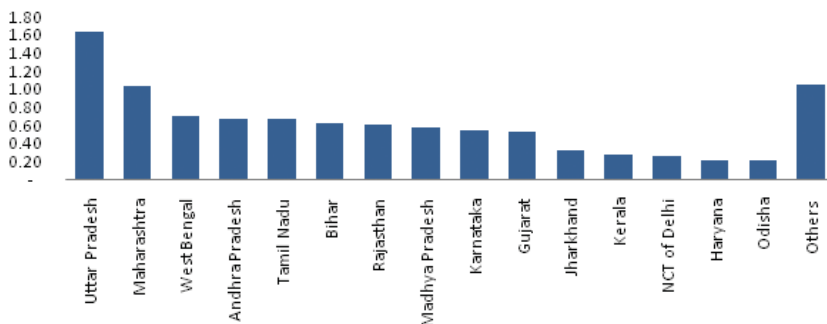
Emerging Trends, Growth Drivers and New Opportunities

- ❖ Report (PDF)
- ❖ Data-set (Excel)

Key Takeaways

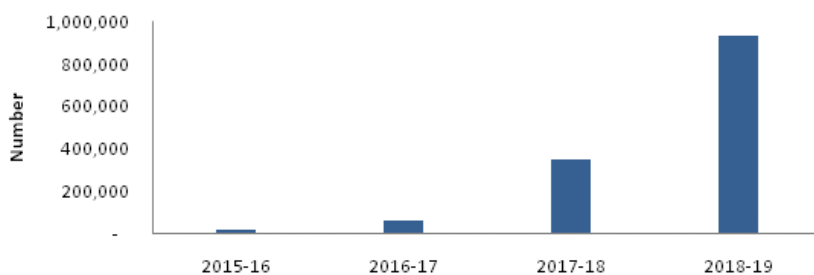
- The inward migration of people from rural and semi-urban areas to urban areas is continually exacerbating the housing shortage situation in cities. The fact that majority of these migrants hail from lower income groups, brings the need for affordable housing into limelight. The affordable housing sector, in its current state - a shortage of 10 million houses (urban areas), is in no way equipped to cater to the burgeoning demand.

Figure 1 State-wise Urban Housing Shortage, 2017



- The Prime Minister Awas Yojana (PMAY) - Urban, launched in 2015 aims to address the challenge of housing shortage amongst low-income groups in cities and envisages building of 20 million houses by 2022. A rural component has also been added to PMAY, which aims at building/upgrading 10 million houses by 2019.

Figure 2 Completed Houses under PMAY- Urban



- The private participation narrative in the affordable housing space is also changing favourably. A large number of developers are making inroads into this segment and are finding it lucrative. One of the biggest policy impetus for private developers came through the formulation of a public-private partnership (PPP) policy in September 2017.
- The next few years until 2022, will be action packed for the affordable housing space. Policy impetus coupled with various affordable housing schemes by state governments and active private sector participation will result in tailwinds for the sector, making Housing for All a commercially viable opportunity.

Executive Summary

SECTION I: MARKET OVERVIEW AND TRENDS

1. Housing Market Overview

- ❖ Urbanisation and Demographic Trends
- ❖ Current Infrastructure Scenario
- ❖ Institutional Structure
- ❖ Policy and Regulatory Framework
- ❖ Recent Government Initiatives
- ❖ State Initiatives
- ❖ Key Trends and Growth Drivers
- ❖ Barriers in Provisioning of Affordable Housing
- ❖ Upcoming Opportunities
- ❖ Future Outlook

2. Demand and Supply Indicators

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

3. Impact of New Policy Developments

- ❖ Infrastructure Status to Affordable Housing
- ❖ Impact of GST
- ❖ RBI's Priority Sector Lending Norms
- ❖ Union Budget 2018-19 - Announcements and Expected Impact
- ❖ Credit-Linked Subsidy Scheme
- ❖ RERA Act
- ❖ Impact of the Smart Cities Mission
- ❖ Other Policy and Regulatory Announcements (tax incentives, increase in carpet area, etc.)
- ❖ Unresolved Legal and Regulatory Issues

4. Private Sector Experience and PPP Potential

- ❖ Experience So Far
- ❖ PPP Policy and New Models
- ❖ Impact of the New Policy
- ❖ Industry Views and Expectations
- ❖ Key Projects and Upcoming Opportunities
- ❖ Successful Global Models/Case Studies

5. Project Economics and Investment Experience

- ❖ Pricing and Profitability
- ❖ Key Cost Components
- ❖ Factors Impacting Project Viability/Profitability
- ❖ Project IRRs
- ❖ Experience So Far
- ❖ Funding Sources
- ❖ Growing Interest from Private Equity/Institutional Investors
- ❖ New Financing Instruments
- ❖ Recent Financial Transactions
- ❖ Investment Projections and Outlook
- ❖ Issues and Challenges

6. Central Level Schemes: Progress and Opportunities

- ❖ Overview
- ❖ Pradhan Mantri Awas Yojana - Urban
- ❖ Pradhan Mantri Awas Yojana - Gramin
- ❖ Deen Dayal Antyodaya Yojana - National Urban Livelihoods Mission
- ❖ Outlook and Opportunities

7. Construction Materials, Design and Techniques

- ❖ Current Scenario and Practices
- ❖ Emerging Construction Technologies and Adoption
- ❖ Advancements and Developments in Technology
- ❖ Trends in Material and Equipment Usage
- ❖ New Green Materials and Innovations
- ❖ Global Best Practices
- ❖ Segment Outlook

Section II: Outlook, Projections and Opportunities

8. Demand and Supply Projections

- ❖ Growth Drivers
- ❖ Housing Stock Requirement
- ❖ Housing Supply Projections
- ❖ Land Requirement
- ❖ Projections for Material and Equipment Requirements
- ❖ Sector Outlook

9. Project Pipeline

- ❖ Overall Project Pipeline
- ❖ Project Pipeline by State
- ❖ By Ownership
- ❖ By Stage of Development

10. Top Markets for Affordable Housing

- ❖ Overview
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- ❖ Bengaluru
- ❖ Chennai
- ❖ Delhi NCR
- ❖ Hyderabad
- ❖ Kolkata
- ❖ Mumbai
- ❖ Pune

11. Market Opportunities

- ❖ Emerging Opportunities
- ❖ Under Key Schemes and Projects
- ❖ Opportunities for Stakeholders

SECTION III: FOCUS ON STATE INITIATIVES

12. Major State Profiles and Analysis

- ❖ Andhra Pradesh
- ❖ Bihar
- ❖ Chhattisgarh

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

SECTION IV: PROFILES OF KEY PLAYERS

13. Key Players

- ❖ Arihant Superstructures
- ❖ Design Build Serve
- ❖ Dreams Group
- ❖ Foliage Real Estate Developers
- ❖ Janaadhar
- ❖ Mahindra Lifespaces
- ❖ Maple Shelters
- ❖ Panvelkar Group
- ❖ Poddar Housing & Development
- ❖ Provident Housing
- ❖ Shapoorji Pallonji
- ❖ Sheltrex
- ❖ Signature Global
- ❖ SNG Group
- ❖ Tata Housing
- ❖ VHBC
- ❖ XRBIA
- ❖ Others

(Each profile covers information on company overview, project portfolio – completed & ongoing, upcoming projects, financial performance and future plans.)

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