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CHENNAI PROPERTY

Triplicane Vyasaraaja Mutt Triplicane, Chennai

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November 2025

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TRENDS

CHENNAI'S RESIDENTIAL MART – ROBUST GROWTH

In Q3 2025, Chennai contributed around 7% of new residential launches across India's top seven cities, introducing approximately 6,400 units. While quarterly launches dipped by 25%, the city recorded a robust 39% year-on-year increase.

Further evaluating the zones, South Chennai dominates the activity, accounting for 72% of total launches, despite a 36% quarterly dip, yet maintaining a 31% rise year-on-year — signalling temporary adjustment within an overall growth trajectory. West Chennai remained steady with 17% of total launches, witnessing a marginal 2% quarterly decline but a 43% annual increase. North Chennai emerged as a rising growth pocket with a notable surge in launches both quarterly and annually, despite contributing 9% of total supply.

The luxury segment accounted for approximately 40% of new supply, indicating a structural shift in demand toward high-end, amenity-driven housing. Although quarterly launches showed marginal moderation, the overall trajectory of Chennai's residential market remains upward, supported by sustained infrastructure development, resilient end-user activity, and changing lifestyle dynamics that continue to shape purchasing behaviour.

Sales Trend : Chennai sales maintain upward momentum



In Q3 2025, Chennai's residential market maintained healthy momentum, with approximately 6,000 units sold — accounting for 6% of total sales across India's top seven cities. Sales increased by 6% quarter-on-quarter and 33% year-on-year, reflecting robust buyer confidence and a sustained demand base.

South Chennai continued to dominate the residential market by accounting to

approximately 66% of sales in Q3 2025 with a slight uptick of 5% observed quarterly and 39% increase year on year. West Chennai stood second with a 19% share of total sales, maintaining a steady pace with a slight increase of about 3% quarterly. North Chennai saw a positive shift in sales activity with a 19% increase quarterly and a commendable 96% increase from the same period last year. Central

Chennai's residential market has maintained healthy momentum amid a sustained demand base, says *Anarock survey*

continued on page 2

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India's real estate sector is projected to contribute 14-20 per cent in GDP by 2047. Moreover, it is at the cusp of a monumental and transformative journey and is projected to grow multifold levels—from nearly USD 0.3 trillion today to a staggering USD 5-10 trillion market by 2047.

INDUSTRIAL & WAREHOUSING

Chennai Q3 Leasing Pick Up at 1.4 million sqft

Chennai has reported record leasing volume in Q3 at 2.83 million sqft, up 31% QoQ and 59% YoY, surveys **Cushman & Wakefield**

During Q3 2025, NH 48 cluster accounted for majority of the overall space uptake in the city with 43% share, followed by Oragadam, according to Colliers survey. Engineering firms drove 36% of the quarterly demand followed by electronics. Vacancy levels surged notably on an annual basis amidst supply additions, especially in NH 16 cluster.



Chennai and Pune also saw exceptional growth at 135% and 76% YoY with manufacturing sector companies driving the bulk of volumes. These

According to Knight Frank India survey, the development of Grade A warehousing facilities has continued to increase in recent years and constitutes 43% of the total warehousing stock in the top eight markets. Pune and Chennai have the highest concentration of Grade A stock at 68% and 78% respectively due to their primary demand base of auto and auto ancillary occupiers.

three markets drove majority of the growth by accounting for 7.5 million sq ft or 79% of the incremental volumes seen in H1 2025 compared to the base period of H1 2024.

Gross Absorption		Supply		Vacancy	Sectoral Mix
Q3 2025	YTD 2025	Q3 2025	YTD 2025	As of Q3 2025	YTD 2025
1.4 msf	5.1 msf	2.1 msf	5.6 msf	13.8%	47% - Engineering 20% - 3PL 10% - Automobile

Source: Colliers

INDUSTRIAL AND LOGISTICS – LAND VALUES / RENTS (Q3 2025)

Cluster / Micromarket	Land values (Rs crore per acre)	YoY change	Rents (Rs/sqft/month)	YoY change
GST Road	5-7	3.4%	28-39	0.0%
NH48 – Chennai-Bengaluru Highway	2-4	9.1%	22-30	0.0%
Oragadam	2.5-3.5	0.0%	26-33	0.0%
NH16 – Chennai-Kolkata highway	1.5-3.0	4.7%	20-26	0.0%

Source: Colliers

GST Road: Mahindra World City (MWC), Maraimalai Nagar | **NH 48 (National Highway 48) – Chennai Bengaluru Highway:** Irungattukottai, Sriperumbudur, Mannur, Mappedu, Polivakam, Mevalurkuppam | **Oragadam:** Oragadam, Vallam NH 16 (National Highway 16)– **Chennai Kolkata Highway:** Gummidipoondi, Sricity, Redhills, Poochiathipedu, Periyapalayam, Vishnuvakkam

Note: Data for warehousing / industrial sheds pertains to Grade A buildings. Absorption does not include lease renewals, precommitments and deals where only a Letter of Intent has been signed. Capital values are for serviced and vacant industrial land. Rents are on built up area and do not include common area maintenance (CAM) or taxes. YoY change for rents and capital values are basis average values of locations in the particular micro market.

INDUSTRIAL & LOGISTICS – KEY TRANSACTIONS (Q3 2025)

Tenant	Area (sqft)	Property	Micromarket
Avenue Supermarkets	251,700	Kochar Industrial Park	Sengadu-NH48
Hikoki	226,000	CapitaLand Industrial Facility	MWC-GST
KRR Industries	156,000	Casagrand Industrial Park	Poonamallee

Source: Colliers

INDUSTRIAL & LOGISTICS IN Q3 2025 – VOLUME SHARE

Large shed deals	Medium shed deals	Small shed deals
200,000 sqft or more – 45%	160,000 sqft – 1,99,999 sqft – 24%	Less than 166,000 sqft – 31%

Source: Colliers

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Chennai's Residential Mart – Robust Growth

Chennai remained positive, recording mild 3% gains quarterly and 29% annually.

Overall, the sustained sales growth across zones reflects active end-user participation, competitive pricing, and renewed confidence in Chennai's residential market — indicating continued stability and positive absorption trends as the city moves into the final quarter of 2025.

Available Inventory : Chennai inventory holds firm amid consistent demand

In Q3 2025, Chennai's available residential inventory stood at approximately 32,400 units, accounting for 6% of the total stock across India's top seven cities. The city witnessed a marginal 1% quarterly rise in inventory, indicating a balanced market environment, while a 13% year-on-year increase.

South Chennai continued to lead with 64% of the total available stock, followed by West Chennai 22%, North Chennai 12%, and Central Chennai 2%. By pricing category, mid-end homes comprised 47% of

the total inventory, while high-end units accounted for 35%. The luxury and ultra-luxury segments represented 11% and 5% respectively. The affordable category saw a slight decline, contributing just 2% of total supply by the end of the quarter.

Notably, Chennai's inventory overhang improved to 20 months, down by a month sequentially — reflecting firm absorption levels, balanced supply dynamics, and ongoing market resilience as the city approaches the final quarter of 2025.

Outlook

Chennai's residential market is likely to show positive momentum through coming quarters, supported by festive season demand and ongoing infrastructure upgrades. Expansion in the IT-ITeS and manufacturing sectors, along with pro-development policies, sustained mid-segment buyer interest. Progress on Metro Phase II and the growth of IT corridors further reinforced market activity, while price movements are likely to remain moderate during the period.

CHENNAI Q3 SNAPSHOT

Launches	Sales	Available Inventory	Average quoted base selling price
6,400 units -25% quarter change	6,000 units 6% quarterly change	32,400 units 1% quarterly change	Rs 7,010 per sqft.

Source: Anarock

A BIRD'S EYE VIEW

Key Micromarkets	Rental Values		Capital Values	
	Average quoted rent (Rs/month)	Quarterly change (%)	Average quoted rate (Rs/sqft)	Quarterly change (%)
Oragadam	14,000 – 19,500	2%	4,810	1%
Perumbakkam	18,000 – 25,500	1%	6,250	2%
Guduvanchery	14,500 – 22,000	0%	5,320	1%
Avadi	13,000 – 18,000	2%	5,250	2%
Perambur	18,500 – 27,000	1%	7,870	2%

Source: Anarock

Over the past few years, Global Capability Centres (GCCs) demand has gained strong momentum, leasing around 100 million sqft, contributing 36% in overall office demand across top 7 cities

SNAPSHOTS

Chennai-Bengaluru Expressway making progress at Sunguvarchathiram

The construction of 106-km Bengaluru-Chennai Expressway in Tamil Nadu, has been further delayed due to the relocation of high-voltage power towers and transmission lines in the Arakkonam-Kancheepuram (25.5 km) section. Work on the Sunguvarchathiram roundabout is making progress (see photo above). There are three nodes viz. Ponneri, Krishnapatnam and Tumkuru. Once the corridor comes up, due to connectivity and development, there will be huge amount of industrial investment happening in the corridor. The Karnataka government is planning to extend the corridor further upto Mangalore so as to connect the east seaport with the west seaport. If that happens, the entire corridor will see three international airports connected apart from having two seaports at both the ends.



The 262-km, four-lane, access-controlled expressway stretches from Sriperumbudur to Hoskote in Karnataka.

Hiranandani forays into senior living, to develop 1mn sqft in Oragadam

Communities, a Niranjan Hiranandani Group initiative, today announced its strategic entry into the emerging asset class of premium senior living with the launch of 'Elements' at Hiranandani Parks, Oragadam — an integrated township in Chennai. It has signed value partnership with GTB Group to introduce premium senior living in Oragadam.

Spread across 4.5 acres with a development potential of 1 million sq. ft., the project will feature 400 residences, to be developed in two phases. Each residence will be thoughtfully designed 2 BHK unit of approximately 700 sq. ft., priced from Rs 60 lakh onwards. The overall project value is estimated at Rs 300 crore.



Dr. Niranjan Hiranandani, Founder & Chairman, Hiranandani Communities, "The launch marks a pioneering collaboration between Hiranandani Parks and GTB Developers, aimed at creating a world-class, wellness-driven ecosystem tailored for senior citizens. The development will integrate holistic care, on-site medical assistance, recreational and wellness programs, assisted living facilities, and hospitality services — enabling residents to lead a secure, dignified, and fulfilling lifestyle within the broader township environment.

Bharat Doshi, Chairman, GTB Urban Developers, added: "This partnership exemplifies the power of synergy. It brings together scale of Hiranandani to the detail of GTB". Arun Bharathi, Managing Director, GTB Urban Developers, said: "Elements at Hiranandani Parks will be one of the finest Retirement Communities in the country, blending community living with the advantage that technology has to offer us for modern care."

With India's senior population projected to reach 194 million by 2031, the senior living segment represents a high-growth, under-penetrated real estate opportunity.

GTN Launches Lifestyle Homes with Lagooning on ECR

GT Bharathi Urban Developers Pvt. Ltd. (GTB), has announced the launch of Republic of Nature (RON), India's first man-made beach micronation, a pioneering residential and lifestyle destination along the ECR, at a press conference held in Chennai. This landmark project brings together luxury living, nature-inspired design, and sustainable development, redefining upscale living in across India.



The township features resort-themed luxury villas and premium apartments, offering residents a serene escape with world-class amenities. GTB has signed a partnership with The Indian Hotels Company Limited (IHCL) India's largest hospitality company and custodian of the iconic brand Taj to develop a 120-key IHCL SeleQtions hotel. This hotel is envisioned as a natural gateway for travellers focussing on wellness and positioning this property as Chennai ECR's new destination for weekend getaway.

Bharat Doshi, Chairman, GTB Urban Developers, said, "We believe in creating luxury spaces worth living and investing. Republic of Nature, which is a unique offering of Chennai which possesses many of the firsts, including a Man-Made Beach, IHCL SeleQtions hotel, and yet to be announced Internationally Renowned Branded Residences, thus, creating value for the investors. Our low-density development has only 15 units per acre including various offerings of apartments, villaments, row-houses and villas."

Arun Bharathi, Managing Director, GTB Urban Developers, said, "Republic of Nature is a journey to create time-less luxury by bringing multiple smaller elements of nature together, and slowing down time. We have worked with architects, designers and sustainability believers to create a one of kind micronation experience, where one side is a forest and hill and the other side is sea and beach. We are introducing fully managed residences where the owners can opt-in not just for managing their residences' rental, resale and but also the hospitality features such as food and beverage, housekeeping and maintenance of the residences."

The project, coming up on 32 acre land, will have 60 villas and 154 apartments. The villas and row houses sizes range from 2,500 sqft to 4,800 sqft. Three model villas are ready. The least price for an apartment is said to be Rs 90 lakh and goes upto Rs 2.5 crore. Prices for villas may range from Rs 3.75 crore to Rs 6.5 crore. Though the promoters are eligible for 2.8 FSI, they intend achieving 1.2 FSI and the project is outside the purview of CRZ restrictions. The company expected to generate a revenue of Rs 2,500 crore in the project has management services extended for inmates. The project is likely to be completed in 3 years time before 2030 by which time they expect everything to be operational. It has projects in Bengaluru and Hosur and plans to expand in Chennai's outskirts as well.

Chennai's 97,946 buildings are exposed to high damage risk, says Nature Sustainability study

Building damage poses serious safety risks, causing substantial financial losses worldwide, says a study by Nature Sustainability in its October edition. Engineering shortcomings are commonly cited as the cause of long-term structural failures, often neglecting the exacerbating role of land subsidence. The survey used satellite radar observations during 2015–2023 to estimate differential settlements at 5 fast-growing Indian megacities, including more than 13?million buildings and 80?million people. The analysis reveals 878?km² of land subsiding, exposing ~1.9?million people to subsidence rates of more than 4?mm?yr⁻¹. An estimated 2,406 buildings across Delhi, Mumbai and Chennai are at high risk of structural damage from ongoing land subsidence. Sustained over 50 years, current subsidence rates could place as many as 23,529 buildings at very high risk of structural damage in Chennai, Delhi, Mumbai, Kolkata and Bengaluru. The survey results highlight the compounding risk of infrastructure damage from subsidence, assisting policymakers to develop resilience plans and adaptation strategies that prioritise mitigation and maintenance spending.

In Chennai, the widespread subsidence observed in the city centre can be attributed to the compaction of alluvium deposits from Holocene fluvial sediments, especially in the floodplain of the Adyar River characterized by sandy clay, silt and sand. In addition, the two major hotspots of subsidence (K.K. Nagar and Tondiarpet) in Chennai can be related to groundwater extraction.

Approximately 39 buildings in Chennai are in the medium hazard category, having Btot ranging from 0.0006 rad to 0.02 rad. All of Bengaluru and Kolkata fall within the low hazard category.

For the far-future scenario less than 4.6% and 1% of the total area of each megacity experiences high and very high-risk levels. The study estimated that 11,457, 3,477, 112, 8,284 and 199 buildings are within the very-high-damage-risk zone in Delhi, Mumbai, Kolkata, Bengaluru and Chennai, respectively. Also, in Chennai, 97,946 buildings are exposed to high damage risk, and the corresponding values for Delhi and Kolkata are 38,428 and 30,344, respectively. The analysis suggests that in 30 years, an estimated 3,169, 958 and 255 buildings in Delhi, Chennai and Mumbai will face a very high risk of damage. Furthermore, in 50 years, 11,457, 3,477, 112, 8,284 and 199 buildings in Delhi, Mumbai, Bengaluru, Chennai and Kolkata are expected to be at very high risk of damage. These results reveal that Chennai is characterised by a large number of buildings exposed to high and very high structural damage risk, surpassing Delhi and Mumbai in the far-future projections.

REALTY UPDATE

Institutional Investments in Indian Real Estate

- Institutional investments in Indian real estate registered USD 1.3 billion inflows in Q3 2025, marking an 11% YoY increase, reflecting a continued investor confidence in India's economic fundamentals and resilience of the real estate sector
- In Q3 2025, Investments in office segment surged by 27% YoY to USD 0.8 billion, accounting for over 60% of the total quarterly inflows, led by notable acquisitions of ready commercial properties, particularly in Chennai and Pune
- Domestic investments surged 51% annually in Q3 2025, at USD 0.8 billion, accounting for 60% share in overall quarterly inflow.

Institutional Investments in Indian real estate (US\$ billion)						
2019	2020	2021	2022	2023	2024	YTD 2025
6.3	4.8	4.0	4.9	5.4	6.5	4.3

Source: Colliers

Assetwise share and Trends for Institutional Investments in Q3 (US\$ billion)

Sector	Share			
Office	62%	0.8 billion	27% YoY	↑
Residential	25%	0.3 billion	17% YoY	↓
Mixed use	6%	0.1 billion	51% YoY	↑
Alternatives	6%	0.1 billion	NA	↑
Industrial & Warehousing	1%	0.02 billion	82% YoY	↓

Source: Colliers

SAVILLS REAL ESTATE ROUNDUP

- Starlink leases 1,294 sq. ft. (120 sq. m.) office space in Chandivali, Mumbai
- Centrum Capital sells affordable housing finance business to Weaver Services for INR 430 cr., consolidating housing finance operations
- DRA Homes acquires 4.3-acre land parcel in Chembarambakkam, Chennai for INR 50 cr. for the residential development
- Bhive Workspace leases over 0.1 mn sq. ft. (9, 290 sq. m.) office space in Bellandur, Bengaluru to expand its co-working footprint
- Sammaan Capital secures USD 300 mn through an international bond issuance for affordable housing finance
- IKEA leases a 37,000 sq. ft. (3, 437 sq. m.) retail space in Pune, expanding its retail presence in India
- House of Hiranandani to invest INR 5 bn in a commercial project in Mumbai with a leasable area of 0.4 mn sq. ft. (37,161 sq. m.)
- Signature Global secures INR 875 bn through NCDs for mid-income housing projects, supporting affordable housing
- YEIDA to acquire 94-acre land parcel for the Apparel Park project, NOIDA, aiming to boost manufacturing and employment
- Sattva Group partners with Innovalus to set up platform for establishing GCCs in India to boost commercial real estate
- Adani plans to invest INR 530 bn in Vadhavan port projects, supporting infrastructure and industrial growth
- Altum Credo Home Finance raises INR 1.7 bn from British International Investment, boosting affordable housing finance options
- Serene Communities enters Hyderabad with INR 4 bn senior living projects in partnership with Prathima Group
- Blackstone to acquire 10% stake in Federal Bank for INR 62 bn, expanding real estate investments
- Himachal Pradesh government approves INR 30 mn under PMAY 2.0 for Una district to benefit 117 families under affordable housing schemes
- Telangana government allocates INR 22.2 bn for Indiramma scheme beneficiaries, reinforcing commitment to urban housing development

Source: Savills.com

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RESIDENTIAL SCENARIO

PREMIUM HOUSING DEMAND 4% WITNESSED GROWTH IN 9 MONTHS

Apartments valued at INR 1 crore and above (premium housing) recorded 4% Y-o-Y growth in sales during first nine months (January-September) of 2025.

While total residential sales fell 12% Y-o-Y to 202,756 units in January-September 2025, premium homes valued at INR 1 crore and above posted 4% growth over the same period. This is especially evident in the INR 1.5-3.0 crore category, which saw demand increase by approximately 10% compared to January-September 2024. Despite falling sales volumes attributed to sustained high property prices, seasonal monsoon impacts, pre-festive lull in housing demand, and uncertainty in the economic environment, the Indian housing market underwent recalibration while maintaining strong underlying fundamentals, as evident from increasing sales in the premium housing segment. Growing interest in high-end and premium residential developments has dampened mass housing market momentum, evidenced by a significant 30% Y-o-Y decline in sub-INR 1 crore home sales during the first nine months of 2025.

Consistent with the nine-month pattern, India's top seven cities posted a 9% Y-o-Y and 2% Q-o-Q sales decline in Q3 2025, totaling 67,980-unit sales, except Pune and Chennai which posted 14% and 13% Y-o-Y growth when compared to Q3 2024. Despite the temporary slowdown, Bengaluru, Mumbai, and Pune each exceeded 12,000-unit sales during the quarter, together representing approximately 63% of total Q3 sales—an increase from their 60% share in Q3 2024. The premium segment showed marginal Y-o-Y growth in sales during Q3 2025, however homes priced within INR 1.5-3.0 crore experienced 14% Y-o-Y growth. Demand in the sub-INR 1.0 crore range decreased by 23% Y-o-Y compared to the same period last year.

“January-September 2025 showed a shift toward a “value-driven” market with premium housing demand driving overall sales despite 12% Y-o-Y drop-in total units sold. Interesting to note, demand for projects launched during the same quarter has been witnessing sustained momentum, with Q3 2025 following this trend. Even for the period between January to September 2025,

HIGHLIGHTS

- Apartments priced at INR 1 crore and above accounted for approximately 62% of total sales in the first nine months of 2025, up significantly from 52% in the same period of 2024.
- This increased contribution was primarily driven by 10% growth in demand for the INR 1.5-3.0 crore housing segment.
- While premium homes gained market share in year-to-date (YTD – January to September) sales, the mass segment’s (sub-INR 1 crore) share dropped from 48% to 38% compared to the same period last year.
- Bengaluru, Mumbai, and Pune maintained their leadership with more than 60% share in residential sales volume across India's top seven cities during January-September 2025, despite a 9% decline in their combined sales.
- Despite a marginal Y-o-Y decline in overall project launches during YTD 2025, launch of homes priced over INR 1 crore surged by 5%.
- Kolkata, Chennai, Pune and Bengaluru recorded significant growth in residential launches during the first nine months of 2025 on a Y-o-Y basis.
- In Q3 2025, Chennai led the Y-o-Y property price growth, while Bengaluru and Delhi NCR followed closely.

approximately 24% of sales were contributed by properties launched during the first nine months of 2025, marginally higher than the share observed during January-September 2024.” said Dr. Samantak Das, Chief Economist and Head of Research and REIS, India, JLL.



Construction cost hikes dampen new housing project launches

“While premium housing saw strong demand, developers were cautious with new mid-range and affordable launches where demand has been sluggish over the last few quarters. Q3 2025 brought 70,915 new homes to market, totalling 225,001 units for first nine months—down just 1% annually. Kolkata, Chennai, Pune, and Bengaluru recorded strong annual growth in launched units. Slower launches helped stabilise inventory and improve absorption, showing market maturation,” said Siva Krishnan, Senior Managing Director (Chennai & Coimbatore), Head - Residential Services, India, JLL.



While total residential sales fell 12% Y-o-Y in Q3, premium homes valued posted 4% growth, says **JLL survey**

14%, while Delhi NCR and Bengaluru both recorded 13% growth. Developer focus on higher-margin premium developments, elevated construction costs, and sustained buyer demand drove broad-based price appreciation across all key markets.

Outlook: Sustained growth trends expected to prevail

The Indian housing market is moving toward a balanced phase after strong growth, as rising property prices create affordability concerns and sales slowdown. Home prices will keep rising due to strong luxury demand, low inventory, and developers' pricing power, even as sales moderate. Overall volume growth will slow, but luxury and premium segments will drive the market. Average transaction values will continue growing as buyers prefer high-end properties. Major listed developers are gaining market share through strong brands and execution skills, while others are expanding from luxury into mid-income projects to reach more buyers and reduce risk. Government support will continue, and investor confidence remains strong with steady private equity and foreign investment flows.

Premium housing segment price growth offsets overall sales volume decline

Home prices in India's seven major cities maintained their upward trajectory in Q3 2025, posting annual increases ranging from 6% to 16%. Kolkata topped the list with 16% growth, followed by Chennai at



Premium housing sales rise by 4% in January-September 2025 amid shift to value-focused market

Ticket Size Break Up - Sales (in INR)	Jan-Sep 2025 sales (No of units)	Y-o-Y Growth (Jan-Sep 2025 over Jan-Sep 2024)	% share in Jan-Sep 2025 sales	% share in Jan-Sep 2024 sales
Less Than 50 Lakh	19,772	-33%	10%	13%
50 Lakh – 1.0 crore	57,275	-28%	28%	34%
Sub 1 crore	77,047	-30%	38%	48%
1.0 crore - 1.5 crore	43,007	0%	21%	19%
1.5 crore – 3.0 crore	51,467	10%	25%	20%
3.0 crore – 5.0 crore	19,180	3%	9%	8%
Above 5.0 crore	12,055	1%	6%	5%
Above 1 crore	125,709	4%	62%	52%
Total	202,756	-12%	100%	100%

Source: Real Estate Intelligence Service (REIS), JLL Research

New Home Launches Decline: Chennai Sets Quarterly Record

Residential Launches (in units)	Q3 2025 Launches	Q3 2024 Launches	Jan-Sep 2025 Launches in launches	Y-o-Y Growth (Jan-Sep 2025 over Jan-Sep 2024)
Bengaluru	12,686	13,376	47,237	11%
Chennai	5,748	3,948	17,781	38%
Delhi NCR	8,697	13,576	30,430	-17%
Hyderabad	8,865	11,320	28,981	-32%
Kolkata	6,099	1,248	15,099	168%
Mumbai	13,605	16,296	42,113	-20%
Pune	15,215	9,110	43,360	23%
India	70,915	68,874	225,001	-1%

Source: Real Estate Intelligence Service (REIS), JLL Research

Home sales decline 12% Y-o-Y during January-September 2025, third quarter down by 9% YoY

Residential Sales (in units)	Q3 2025 Sales (No of units)	Q3 2024 sales (No of units)	Jan-Sep 2025 sales (No of units)	Y-o-Y Growth in sales (Jan-Sep 2025 over Jan-Sep 2024)
Bengaluru	15,630	15,969	45,815	-11%
Chennai	3,926	3,431	10,691	15%
Delhi NCR	8,585	14,141	27,906	-29%
Hyderabad	8,423	8,644	25,005	-5%
Kolkata	3,925	4,071	10,672	-21%
Mumbai	13,628	16,465	42,398	-16%
Pune	13,863	12,295	40,269	1%
India	67,980	75,016	202,756	-12%

Source: Real Estate Intelligence Service (REIS), JLL Research

Note: Mumbai includes Mumbai city, Mumbai suburbs, Thane city, and Navi Mumbai; Delhi NCR includes Delhi, Gurugram, Noida, Greater Noida, Ghaziabad, Faridabad and Sohna.

Data includes only apartments. Rowhouses, villas, and plotted developments are excluded from our analysis.

WAREHOUSING SECTOR

MANUFACTURING LEADS INDIA'S WAREHOUSING
GROWTH IN Q3 2025

According to Knight Frank India's latest edition of India Industrial and Warehousing Market Report Q3 2025, the market has recorded a 16% year-on-year (YoY) increase in warehousing demand to 17.1 million sq ft in the quarter. With sustained occupier appetite, year-to-date (YTD) leasing activity reached 49.2 million sq ft, up 32% YoY, placing the sector on track for another record year.

The report highlights continued momentum from manufacturing, 3PL, and e-commerce occupiers, supported by resilient domestic demand, supply chain diversification, and policy-led industrial expansion. Grade A facilities remained the preferred choice among occupiers, accounting for 61% of leased space so far in 2025, compared to 58% in the same period last year.

Manufacturing strengthens lead; E-commerce surges sharply

Manufacturing occupiers (excluding FMCG and FMCD) maintained their lead as the largest demand driver, contributing 44% of total transactions in Q3 2025 and 45% YTD. The sector clocked a 56% YoY increase in volumes in the first nine months of 2025.

3PL operators continued to support strong leasing volumes, absorbing 27% of space YTD and posting a 17% YoY rise in transactions between January and September 2025.

Industry-Split of Transaction Volume in million sq ft

	YTD Q3 2025 in million sq ft	YoY % change
Other Manufacturing	22.2	56%
3PL	13.5	17%
E-commerce	5.9	86%
FMCG	2.3	67%
Retail	2	-49%
FMCD	1.9	39%
Others	1.6	-17%
Total	49.2	32%

Source: Knight Frank Research

Notes: **Other Manufacturing** – These include all manufacturing sectors (automobile, electronics, pharmaceuticals, etc.) except FMCG and FMCD.

Miscellaneous – These include services such as telecom, real estate, document management, agricultural warehousing and publishing.

The e-commerce sector recorded a sharp revival, leasing 2.5 million sq ft in Q3 2025, a 137% YoY surge, marking its highest quarterly volume since early 2023. E-commerce accounted for 12% of activity YTD, highlighting renewed traction in the segment.

City performance: Mumbai and NCR lead growth

Chennai, Mumbai, NCR, Pune, and Ahmedabad have all recorded their highest YTD Q3 transaction volumes in three years. Notably, Chennai has already surpassed its previous full-year peak and is on track for an exceptional 2025 performance. The manufacturing sector was the primary driver behind the 62% YoY growth seen in Chennai's transaction volumes in YTD Q3 2025 and incidentally, this sector's occupiers also accounted for a massive 62% of the area transacted in this market during the period.

Transaction activity increased across major

Market-Split of Transaction Volumes

	YTD Q3 2025 in million sq ft	YoY % change
Mumbai	10	75%
NCR	8.8	50%
Pune	8	27%
Chennai	6.4	62%
Bengaluru	5	49%
Ahmedabad	5	5%
Kolkata	3.2	-34%
Hyderabad	2.8	13%
Total	49.2	32%

Source: Knight Frank Research

cities, with Mumbai and NCR emerging as standout performers in YTD as well as quarterly terms. Mumbai registered a 123% YoY increase in Q3 2025 and 10 million sq ft YTD, accounting for 20% of national volumes so far in 2025. Delhi NCR surged 93% YoY in Q3 2025 and 50% YoY to 8.8 million sq ft in the January-September 2025 period, supported largely by manufacturing and 3PL demand. Chennai, Pune, and Bengaluru also posted strong YTD gains, aided by manufacturing-led occupier

While the overall absorption recorded 16% YoY growth, YTD leasing touched 49.2 million sqft, up 32% YoY, says **Knight Frank India survey**

traction. Five markets, including Chennai, Mumbai, NCR, Pune and Ahmedabad are at three-year record highs in YTD terms, while YTD volumes this year in Chennai have surpassed annual highs seen previously in that market.

Supply, stock, and vacancy

The total warehousing and industrial stock across the top eight markets stood at 530 million sq ft as of Q3 2025. During this quarter, 17.5 million sq ft of new supply became operational. Grade A developments accounted for 84% of new supply in Q3, and 78% YTD, reflecting growing compliance, automation, and sustainability aspirations among occupiers.

Market-Split of Stock and Vacancy in Q3 2025

Market	Existing Stock million sq ft	Vacancy
Mumbai	163.6	13.3%
NCR	115	18.5%
Bengaluru	56.9	20.5%
Chennai	46	10.4%
Ahmedabad	43.2	11.4%
Kolkata	41.5	9.0%
Pune	38	11.2%
Hyderabad	26.2	18.2%
Total	530.3	12.2%

Source: Knight Frank Research

Average Rent (In INR/sq ft/month)

Market	Q3 2024	Q3 2025	% Change
Mumbai	23.9	24.9	4%
Chennai	23.9	24.9	4%
Bangalore	22.1	23.0	4%
Hyderabad	20.6	21.5	4%
Kolkata	23.9	24.9	4%
Pune	26.9	27.8	3%
NCR	21.1	21.7	3%
Ahmedabad	18.1	18.6	3%

Source: Knight Frank Research

Vacancy remained stood at 12.2% with speculative supply increasing significantly. Vacancy in Grade A assets was higher at

13%, compared to 9.2% for Grade B, primarily reflecting the large share of speculative supply introduced to meet the growing demand for premium Grade A facilities.

Pricing trends

Rent growth remained positive across markets, supported by strong occupier activity, particularly from the manufacturing sector. Average rents rose by 3-4% YoY across cities in Q3 2025, as both development and absorption of Grade A spaces continued to gain momentum.

Shishir Bajjal, Chairman and Managing Director, Knight Frank India, said, "India's industrial and warehousing landscape continues to strengthen on the back of fundamental shifts, particularly manufacturing expansion, supply chain diversification, and improving logistics efficiency. Demand remains broad-based, with leasing activity sustaining growth momentum and Grade A facilities now accounting for 61% in YTD terms of occupier take-up, reflecting a clear move toward global-standard infrastructure. With strong business sentiment and sustained policy support, the sector remains positioned for long-term, high-quality growth."

Outlook

The manufacturing outlook remains strong as firms continue diversifying supply chains and shifting production to India, supported by consistent government incentives. Growing 3PL participation in logistics optimization and the renewed strength of e-commerce are also set to play a pivotal role in driving the next phase of market expansion.



JUDICIAL UPDATES

GST Not Leviable on Accommodation provided in course of employment

GST is not leviable on accommodation provided in course of employment, and input tax credit is available to the extent of cost borne by employer In Re: M/s. Suzuki Motor Gujarat Pvt Ltd. [2025 (8) TMI 1324 - Authority for Advance Ruling, Gujarat]

Issue

Whether GST is leviable on nominal amounts collected from employees/student trainees for providing accommodation facility in a dormitory, arranged by a third-party service provider?

Whether Input Tax Credit ('ITC') can be claimed on payments made to such third-party service provider?

Ratio**Permanent Employees: Taxability of recovery of nominal amount :**

Circular No. 172/04/2022-GST7 clarifies that prerequisites provided by the 'employer' to the 'employee' as per the contractual agreement between the employer and employee are not leviable to GST. In the present case, it is undisputed that the dormitory (accommodation) facility is provided by the Taxpayer as a part of its Company Policy. Hence, the nominal deduction made by the applicant from the employees who are availing accommodation facility would not be considered as a supply under the provisions of section 7 of the CGST Act.

ITC eligibility of GST charged by accommodation service provider : ITC in respect of the accommodation facility provided by the Taxpayer is not blocked under section 17(5) of the CGST Act.

The tax authority's contention that ITC is only eligible if accommodation is provided under a statutory obligation is not tenable as: The services do not find a specific mention under section 17(5)(b)(i) of CGST Act.

Such services cannot be termed as being used for personal consumption. Personal consumption means that goods or services are used for non-business purposes, like for personal use or consumption by partners, directors, proprietors, etc.

Section 17(5)(g) of the CGST Act blocks the ITC when the 'immediate and ultimate' use or consumption of any item is for the personal benefit of the person (i.e., employee, director or any person who can consume on their behalf).

Hence, the Taxpayer would be eligible to avail ITC of GST charged on the procurement of accommodation facilities which are used for providing the same to its employees. However, such ITC would be available to the extent of cost borne by the Taxpayer.

Student Trainees Recovery of amount by the Company : The Taxpayer agrees that the accommodation facility provided to student trainees will be considered as a supply, as student trainees are not on its payroll. Hence, the facility so provided cannot be termed as a prerequisite.

ITC eligibility of GST charged by accommodation service provider : Since the Taxpayer bears the entire cost, it can claim ITC of GST charged by the supplier on procurement of accommodation services.

Courtesy: Indirect Tax Digest, BDO.

According to Knight Frank India's latest edition of India Industrial and Warehousing Market Report Q3 2025, the market has recorded a 16% year-on-year (YoY) increase in warehousing demand to 17.1 million sq ft in the quarter

WAREHOUSING SECTOR

LOGISTICS AND WAREHOUSING UPTAKE REBOUNDS 64% IN Q3

Warehousing and logistics sector witnessed an absorption of 9.2 Mn sq ft in Q3 2025, rebounding by 64% compared to the subdued previous quarter. Despite this robust growth, the absorption was 36% less when compared to the record level of absorption reported in the same quarter a year earlier.

Mumbai contributed the highest to pan-India absorption in Q3 2025, around 47%. In value terms, the city led pan-India absorption with 4.29 Mn sq ft, registering a sharp quarter-on-quarter rise of 377% and 10% increase compared to Q3 2024, indicating a revival after a muted previous quarter. The increase in absorption can be attributed to renewed occupier demand in key micro-markets such as Bhiwandi and Panvel, which accounted for nearly 96% of the total absorption in the city.

NCR followed as the second-largest contributor with 1.28 Mn sq ft of absorption, registering an 83% increase over the previous quarter, though it decreased by 40% compared to the same quarter a year earlier.

Chennai also witnessed sustained leasing activity with 1.13 Mn sq ft of absorption in Q3 2025, the highest in the past seven quarters. Absorption increased by 151% over the previous quarter and 38% compared to the same period a year earlier. The city emerged as one of the best-performing markets among the southern cities.

Leasing activity in Kolkata swelled by 950% over the previous quarter and by 186% compared to Q3 2024, resulting in 1.26 Mn sq ft of absorption in Q3 2025. This is the highest ever absorption recorded in the city.

In contrast to its peer cities, absorption in Pune gradually declined over the consecutive four quarters, reaching 0.64 Mn sq ft in Q3 2025. In addition, the city's absorption declined by 31% over the previous quarter and 87% compared to the same quarter a year earlier. The city, which had previously maintained strong leasing momentum, saw a sharp correction this quarter. Similarly, Bengaluru's absorption also dropped significantly to 0.13 Mn sq ft, recording a steep 94% (quarterly) and 90% (yearly) decline. This was the lowest absorption among the top seven cities. Hyderabad recorded 0.47 Mn sq ft of absorption in Q3 2025, reflecting a 7% increase over the previous quarter but a 14% decline compared to the same quarter of the previous year. Overall, the city's absorption remained largely stable during the year.

Shrinivas Rao, FRICS, CEO, Vestian said, "After a subdued previous quarter, the warehousing and logistics sector has shown clear signs of revival in Q3 2025, with Mumbai, Kolkata, and NCR leading absorption. The resurgence in occupier demand across key micro-markets, coupled with renewed momentum in the

There has been a resurgence of absorption by logistics and warehousing sector in Q3, says *Vestian survey*



E-commerce and 3PL segments, underscores the sector's growing depth and diversification. As occupiers focus on network optimization and grade-A assets,

India's warehousing and logistics landscape is reshaping for a stronger performance in the upcoming quarters."

CITY-WISE ABSORPTION

City	Q3 2025	Q2 2025	Q3 2024	Q3 2025 vs Q2 2025	Q3 2025 vs Q3 2024
Bengaluru	0.13	2.03	1.35	-94%	-90%
Chennai	1.13	0.45	0.82	151%	38%
Hyderabad	0.47	0.44	0.55	7%	-14%
Pune	0.64	0.93	5.08	-31%	-87%
Mumbai	4.29	0.90	3.89	377%	10%
Kolkata	1.26	0.12	0.44	950%	186%
NCR	1.28	0.70	2.15	83%	-40%
Pan-India	9.20	5.57	14.28	64%	-36%

Source: Vestian Research

CAPITAL TRENDS

Rebound in fundraising set to highlight select Investment Strategies

Fundraising has reached a turning point, with closed-end fundraising garnering US\$127 billion in the year to date, a 19% increase from last year and already matching full-year 2024 levels. This rebound marks the end of several challenging years and is driven by a 39% year-over-year jump in Q3 fundraising to US\$35 billion. Dry powder decreased from US\$675 billion in 2023 to US\$584 billion as of year-end 2024 according to Preqin, indicating that capital is being deployed after years of record high levels. Select strategies, including debt and secondaries vehicles in particular, are getting noticed by investors.



Debt strategies captured US\$25 billion in closed end fundraising in Q3 with 56% year-to-date growth, driven in part by the outperformance of the funds' returns vis-à-vis other strategies. Preqin notes that the median 2022-vintage real estate debt fund posted a net IRR of 10.9%, outperforming all private equity real estate strategies. Investors are gravitating towards debt vehicles that deliver steady income streams while avoiding the valuation and exit dependencies that currently challenge value add and opportunistic strategies. Oaktree's Real Estate Debt Fund IV, which made its

final close a US\$3.5 billion, was one of three debt funds above US\$1 billion to close in the third quarter.

Secondary funds are also experiencing momentum with US\$6.4 billion raised in the year to date. This cumulative growth from US\$15 billion (2015) to US\$55 billion (2025) addresses market needs for liquidity, interim monetization and flexible exit strategies. As traditional disposal markets remain constrained, secondaries have evolved from niche solutions to a more flexible liquidit provider. Although comparatively small, annual fundraising to the strategy has been on the rise since 2021, positioning it as an investment strategy to watch.

Excerpts from *Global Real Estate Perspective* by JLL.

CAPITAL TRENDS

Indian REITs to add depth, enhancing liquidity and capital deployment

India's real estate sector is entering a new phase of institutionalization, marked by the growing prominence of Real Estate Investment Trusts (REITs) and Infrastructure Investment Trusts (InvITs), enhancing transparency and liquidity, according to Colliers survey.

- With four office REITs and one retail REIT, India's REIT market is relatively small compared to its global counterparts but is poised for significant growth. Overall, the share of REITs in real estate market capitalization is likely to increase from around 10% currently to 40-50% by 2047, comparable to mature REIT markets.

- REIT penetration in the office market is projected to rise from around 16% currently to over 60% by 2047. Interestingly, of the 830 million sq ft of current Grade A stock, over 370 million sq ft of office space can potentially be included in upcoming REITs, democratizing commercial real estate significantly. In the long-term, India's REIT market will increasingly diversify and expand into industrial, residential, hospitality, data centers & shared living formats.

- India's real estate sector is witnessing a phase of consolidation, driven by strong capital flows, regulatory reforms, and developer expansion in untapped markets. Larger developers are gaining market share driven by acquisitions, entry into newer markets, improved operational efficiency, and a clear focus on organic growth. Smaller players in select segments and

markets, meanwhile, are increasingly merging or exiting, leading to a more structured and resilient sector.

Share of REITs in real estate market capitalisation

2025	2030F	2047F
10%	10-15%	40-50%

Existing REIT Portfolio in Tier I cities (in million sqft)

Office	Retail	Industrial & Warehousing
~133	~5	~11

Source: REITs investor report Q4 FY 2025 (Embassy, Brookfield, Mindspace, Nexus), DRHP March 2025 (Knowledge Realty), Colliers

Note: Warehouses are included in one of the leading Infrastructure Investment Trust (InvITs) of the country. Other listed InvITs typically have infrastructure projects such as roads & highways as their underlying assets.

Penetration of Office REITs in India

2047F	60-70%
2030F	25-30%
2025	16%

Source: Industry, Colliers

Note: REIT penetration is indicated by the proportion of office stock under current REITs as compared to the overall office stock in India.

Excerpts from *Real Estate 2047 Building India Future Growth Corridors* by Colliers

The Supreme Court has stayed a Goods and Services Tax (GST) demand raised on a real estate project executed under a Joint Development Agreement (JDA), a move that could have far reaching implications for developers and landowners across India.

TAX PLANNING

SC Halts GST Demand on JDA Project, Sparks Debate on Taxability of Land Transfers

The Supreme Court has stayed a Goods and Services Tax (GST) demand raised on a real estate project executed under a Joint Development Agreement (JDA), a move that could have far-reaching implications for developers and landowners across India.

A bench comprising Justices Aravind Kumar and R. Mahadevan passed the interim order earlier this month, staying the operation of an assessment order dated January 27, 2025, issued by the CGST and Central Excise, Nashik-I Division against Arham Infra Developers and its associate Nirmite Buildtech.

The apex court also issued notices to the Central Government and other respondents in the developer's special leave petition (SLP), listing the matter for the next hearing within four weeks of the October 13 order.

Background: GST Controversy Over Development Rights

Joint Development Agreements are a popular model in the real estate sector, allowing landowners to contribute land while developers undertake construction, sharing the completed units or profits thereafter. However, the tax treatment of development rights under GST has remained contentious.

The tax authorities have been treating the transfer of development rights (TDR) as a taxable supply of service, arguing that it falls under the ambit of the GST law.

Developers, on the other hand, maintain that land transfers are specifically excluded from GST under Schedule III of the Central Goods and Services Tax (CGST) Act, 2017, which lists activities neither considered as supply of goods nor services.

Bombay High Court's View and Supreme Court Intervention

Earlier, the Bombay High Court had declined to stay the GST demand, holding that the developer should first pursue remedies before the statutory appellate authority under the CGST framework instead of invoking writ jurisdiction.

However, the Supreme Court's interim stay has revived the debate over how JDAs are treated under GST and whether the grant of development rights can truly be viewed as a taxable service.

Experts: Core Issue Is the Nature of the Transaction

According to tax experts, the crux of the issue lies in whether a JDA transaction represents a transfer of land or a supply of service.



The case carries wide implications for the real estate sector, where JDAs are the dominant structure for redevelopment and greenfield projects, especially in metro and tier-1 cities. Legal analysts note that the Supreme Court's stay order underscores the judiciary's evolving stance on the GST applicability to complex land transactions, with several High Courts across states issuing divergent rulings.

In August 2025, the Goa Bench of the Bombay High Court held that no GST is payable once the land ownership transfers to the developer, providing clarity on when tax liability arises under such agreements.

Conclusion

With the matter now before the Supreme Court, the real estate industry will keenly watch how the apex court interprets the nature of JDAs and the legislative boundaries of GST. The final ruling is expected to set a crucial precedent for thousands of similar projects currently under dispute or departmental scrutiny.

Source: caclubindia.com

"At its core, a JDA is a structured mechanism for transferring interests in land," said a senior tax professional. "The sale of land is outside the scope of GST. When a landowner contributes land in return for constructed units, the essence of the transaction remains the transfer of land or rights in land."

Experts further argue that levying GST on development rights effectively amounts to taxing land indirectly, which defeats the legislative intent and can lead to double taxation, first when rights are transferred and again when the final units are sold.

Implications for Real Estate Developers and Landowners

DISCLAIMER : Where opinion is expressed it is that of the authors and does not necessarily coincide with the editorial views of the publisher or Chennai Property.

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