



Real Estate Outlook

**Best Real Estate
Practices for Business
Growth**

**OFFICE SUITE 8 & 9, 3RD FLOOR
NINEX CITY MART, SOHNA ROAD
NEAR RADISSON HOTEL, SECTOR
49 GURUGRAM - 122018, HARYANA**



GURGAON REAL ESTATE --- OVERVIEW

2025
MARCH

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OUR PROFILE

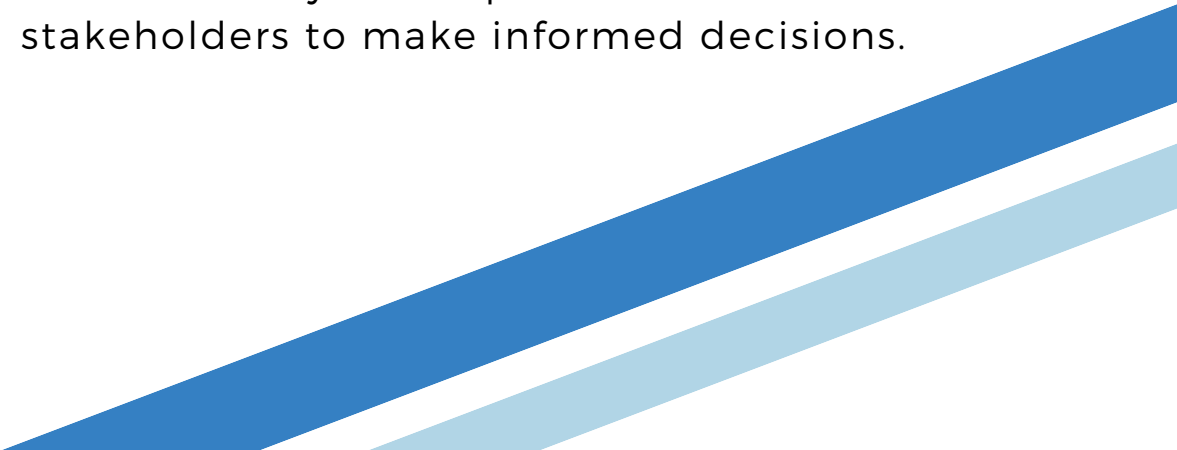
Estate Avenues Analytics is an innovative online subscription based platform that specializes in real estate data and analytics in India. It covers a vast array of over 1,000+ projects from 150+ developers across multiple cities, making it a significant player in the Indian real estate market.

Estate Avenues Analytics stands out as a vital resource for stakeholders in the Indian real estate sector, facilitating better understanding and management of real estate investments through its extensive data offerings and analytical capabilities.

THE OBJECTIVE

The objective of Estate Avenues Analytics, an online subscription based real estate data and analytics platform, is to provide Market Trends, Investment Optimization, Customer Insights, Risk Management and Portfolio Management.

By leveraging advanced data analytics, Estate Avenues Analytics empowers real estate stakeholders to make informed decisions.



Introduction

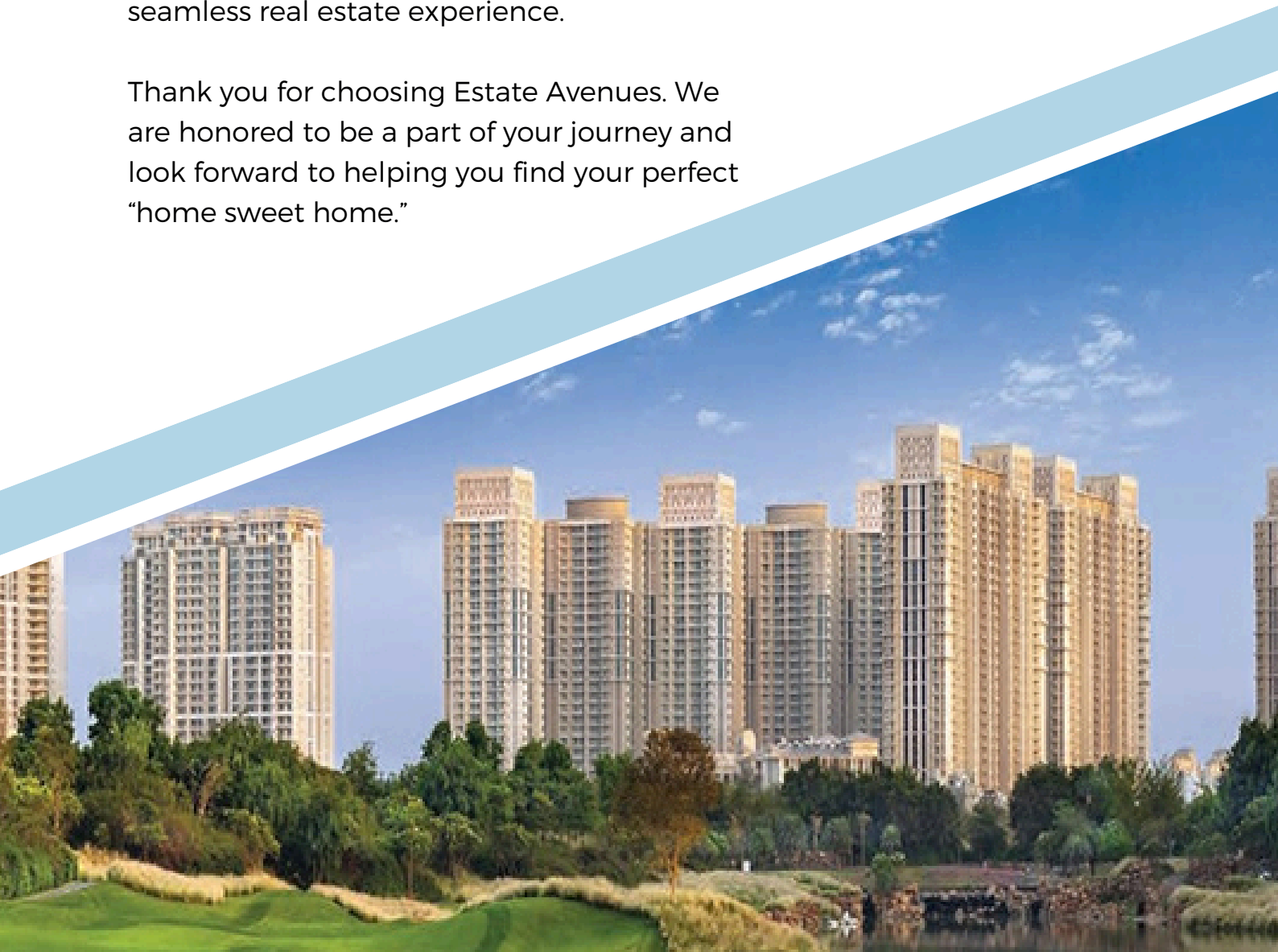
At Estate Avenues, we understand that searching for your dream home is one of the most significant and exciting journeys in life. Our team of highly skilled advisors is committed to understanding your unique needs and guiding you towards the most suitable residential or commercial projects in your preferred locations.

Trust and integrity are at the heart of everything we do. Customer satisfaction is not just a priority for us it's our mission. We are dedicated to going the extra mile to ensure that you receive the best service and a seamless real estate experience.

Thank you for choosing Estate Avenues. We are honored to be a part of your journey and look forward to helping you find your perfect "home sweet home."



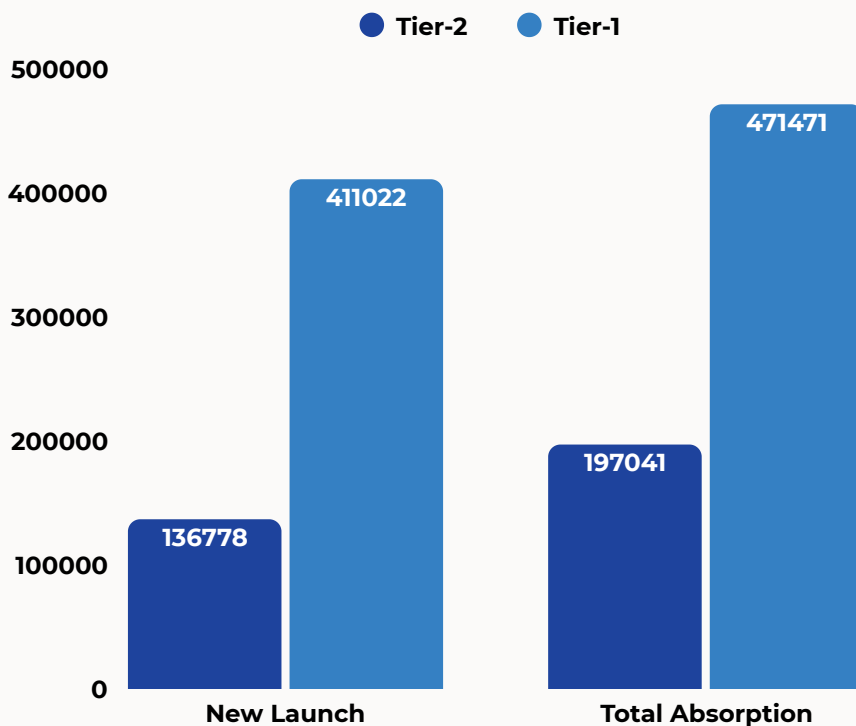
Bhaswar Paul
Founder & CEO



PAN India Growth

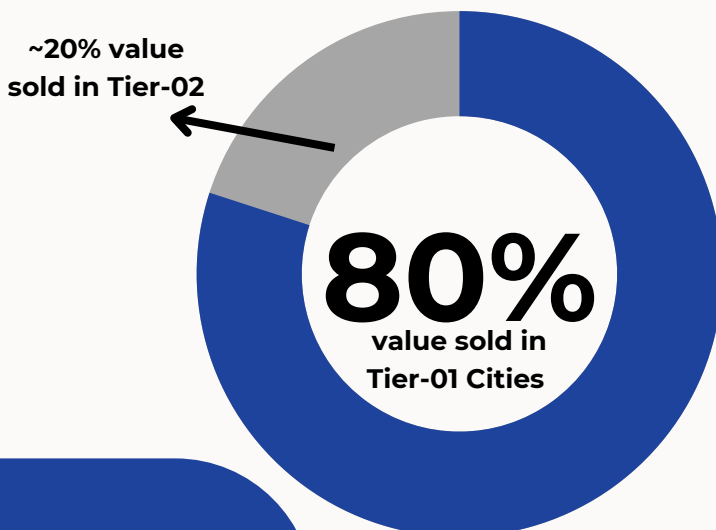
TIER-01 VS TIER-02 CITIES

Supply-Absorption Dynamics in CY'24



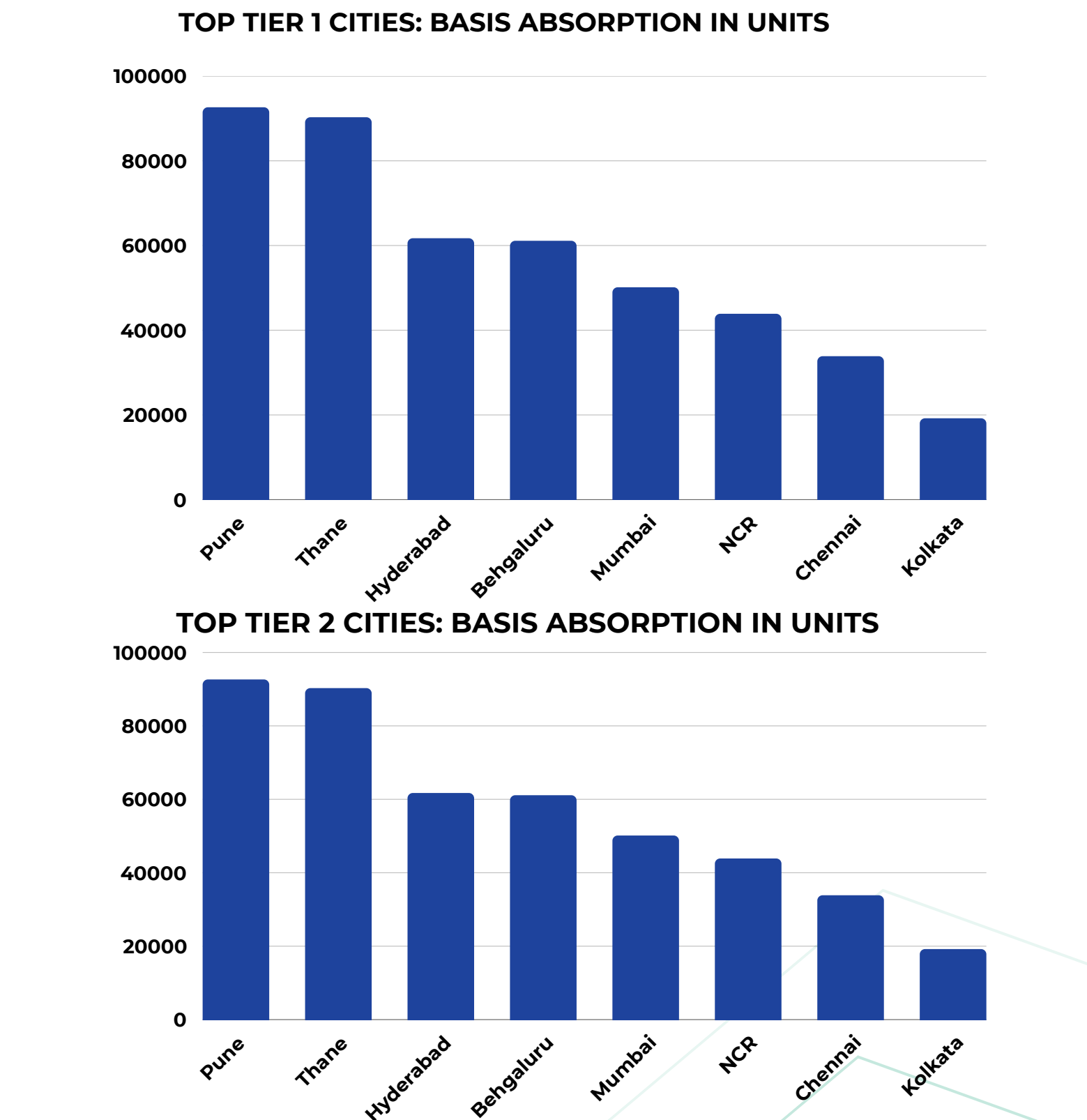
- Tier-2 cities demonstrated robust real estate markets with strong demand exceeding supply by a whopping 44% in 2024.
- Tier-1 cities exhibited significantly higher levels of supply and absorption, the total absorption in Tier2 cities grew by 3% whereas Tier-1 dropped by 8% on a yearly basis.

Market Share of Absorbed Value (in %)



- The market share of real-estate in Tier-01 cities is 4X the share of Tier-02 cities in India in CY 2024.

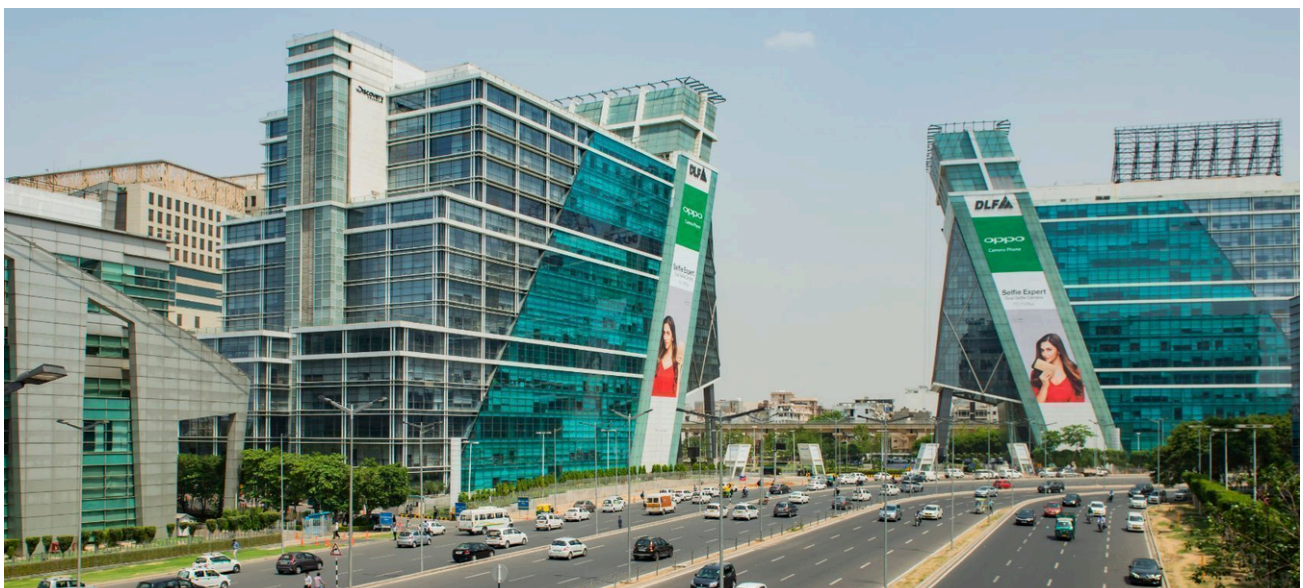
Basis Absorption in Units in Tier-1 & Tier-2 Cities



Overview of Gurgaon's Real Estate Market

Current Market Dynamics

- **Strong Demand & Supply Imbalance**
 - 28.9% demand growth in Q2 2023 (highest among Indian cities).
 - 14% contraction in supply, causing a 2.3% increase in average property prices.
 - Luxury projects like DLF's The Dahlias achieved record sales of **\$1.4 billion in nine weeks.**
- **Luxury Housing Boom**
 - Luxury properties witnessed a 55% annual price appreciation.
 - Luxury homes now make up 26% of all residential sales (up from 7% in 2019).
- **Prime locations:**
 - Golf Course Road
 - Golf Course Extension Road
 - New Gurgaon
 - Dwarka Expressway



Yearly Appreciation in Gurgaon Market

Last Year Appriciation

Golf Course Road

↑ 30%

Golf Course
Extension Road

↑ 29%

Dwarka
Expressway

↑ 49.3%

Last 3 Year Appriciation

Golf Course Road

↑ 80.5%

Golf Course
Extension Road

↑ 88.7%

Dwarka
Expressway

↑ 112%

Last 5 Year Appriciation

Golf Course Road

↑ 120%

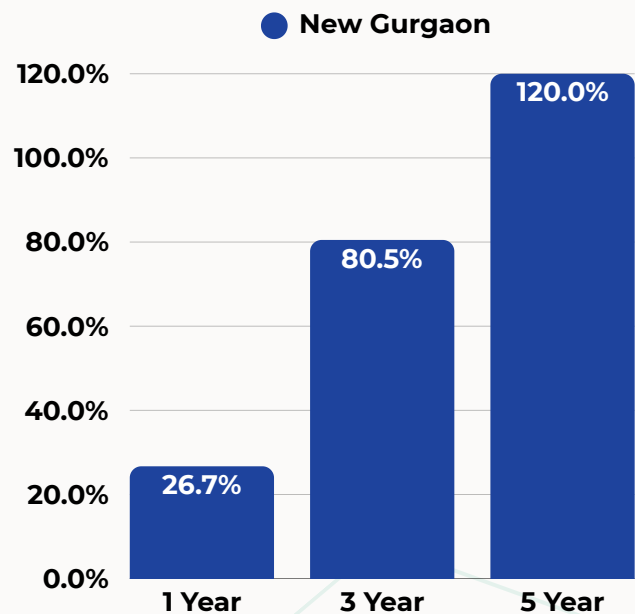
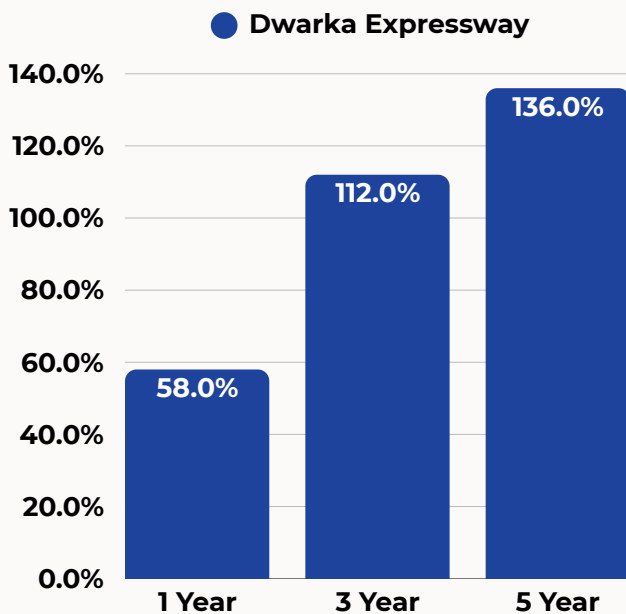
Golf Course
Extension Road

↑ 110.7%

Dwarka
Expressway

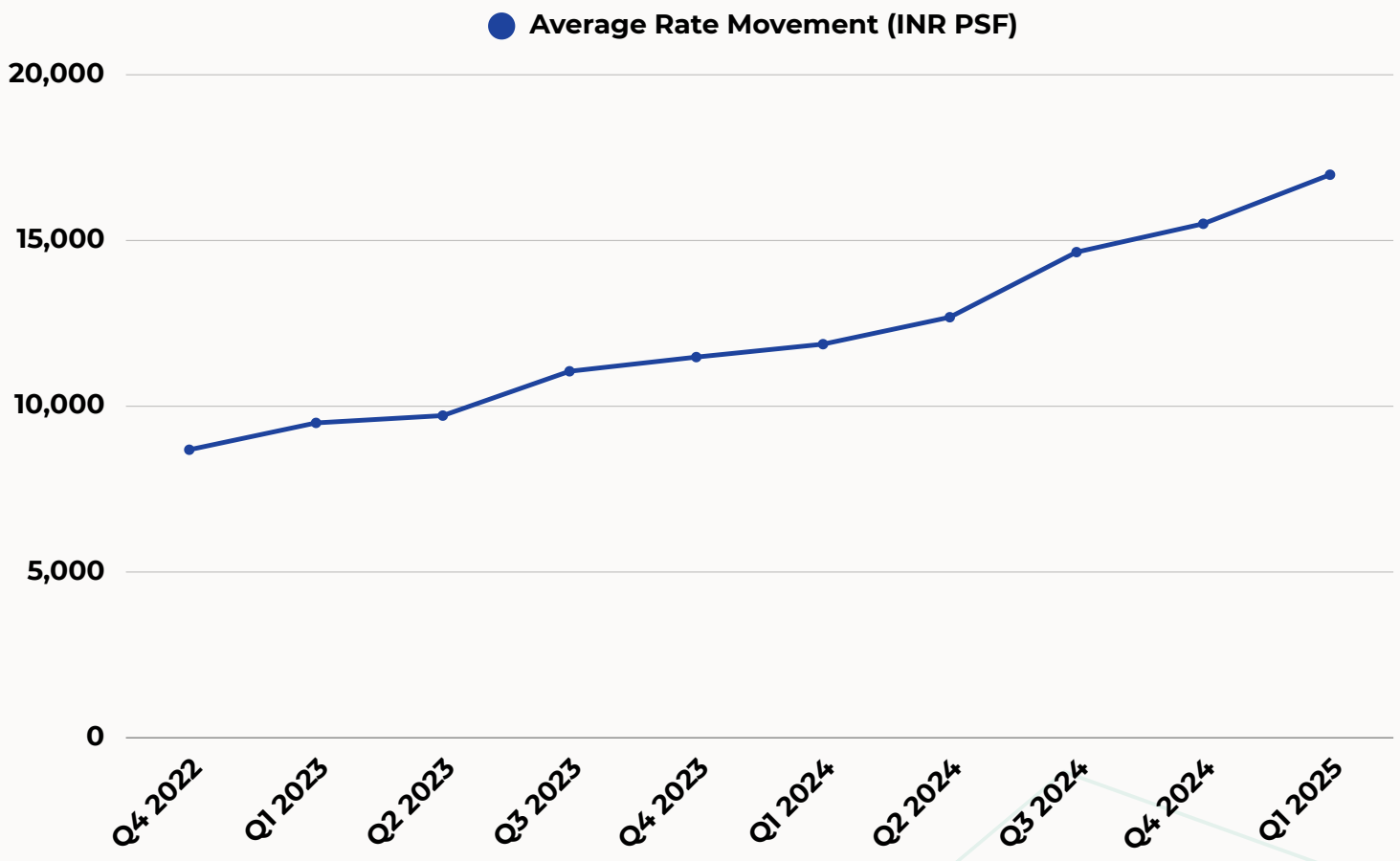
↑ 136%

Yearly Appreciation in Gurgaon Market



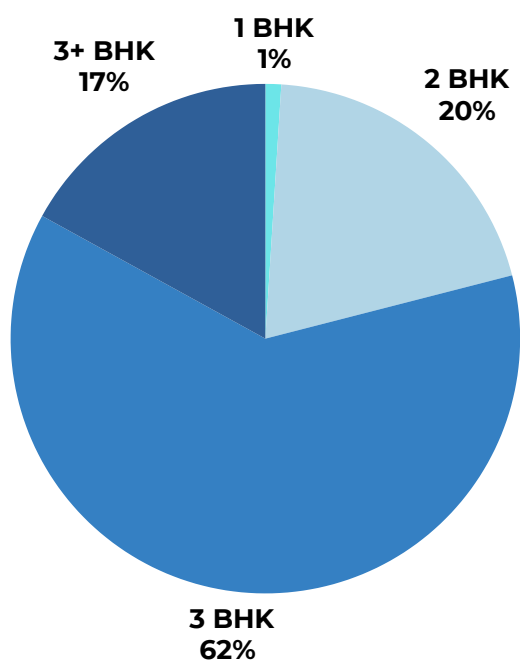
Average Rate Movement in Gurgaon Market

- **Average Rate Movement (in INR PSF)** over different quarters from Q4 2022 to Q4 2024.
- The rates have consistently increased over time, as represented by the blue bars.
- **Key observations:**
 - The price started at 8,688 INR PSF in Q4 2022.
 - It steadily increased each quarter, reaching 15,505 INR PSF in Q4 2024.
 - The rate of increase appears to be accelerating, especially from Q1 2024 onwards.

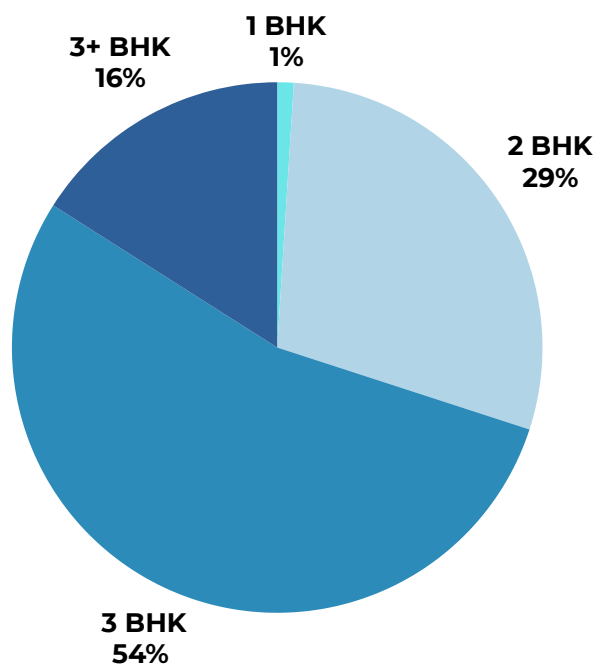


Demand-Supply Analysis in Gurgaon Market

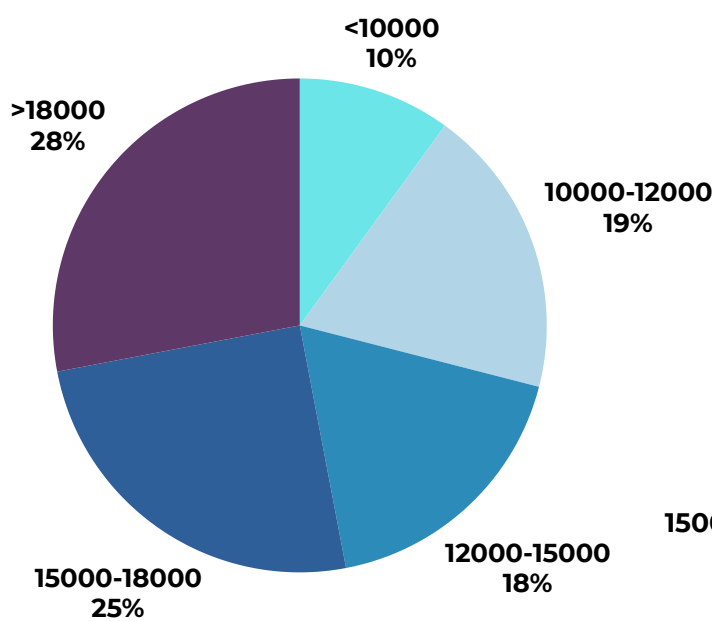
Demand by Configuration



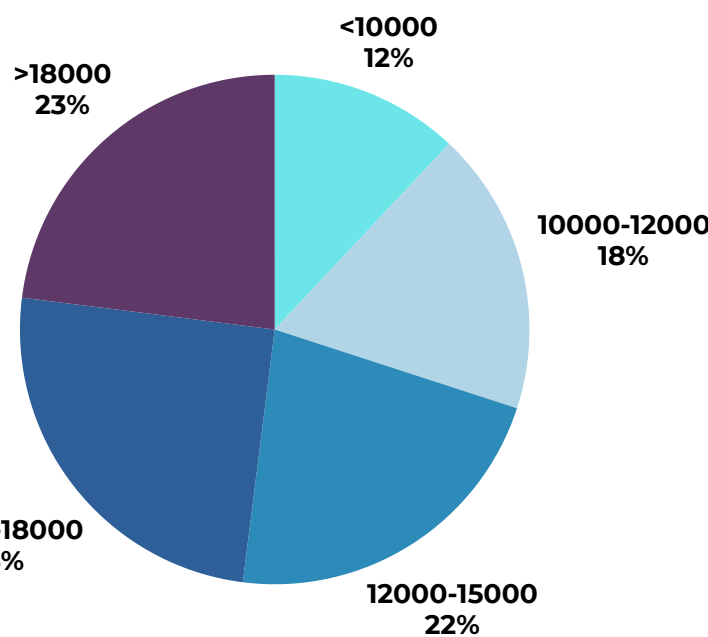
Supply by Configuration



Demand by Rate (PSF)

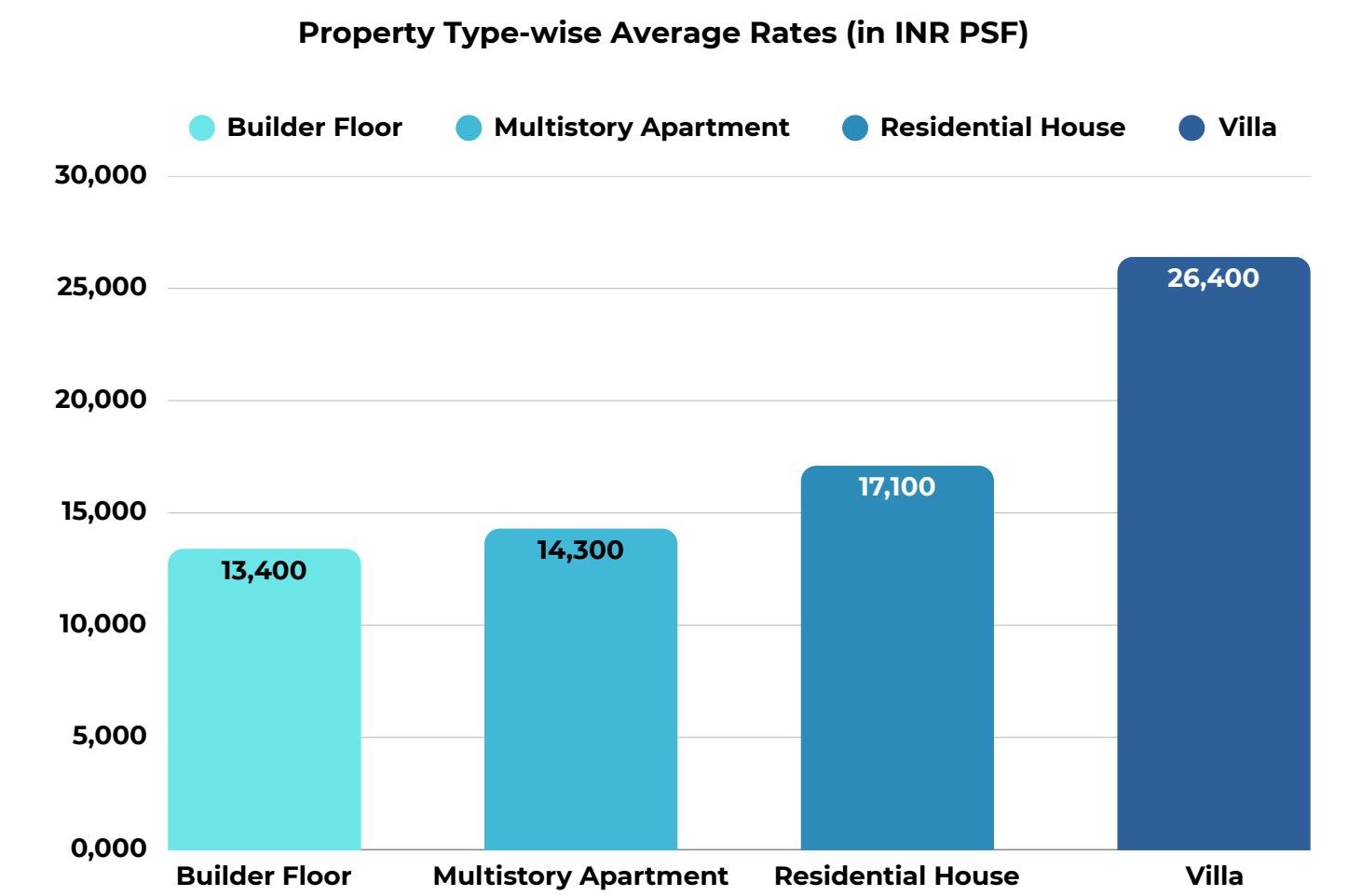


Supply by Rate (PSF)



Property Type-wise Average Rates INR (PSF)

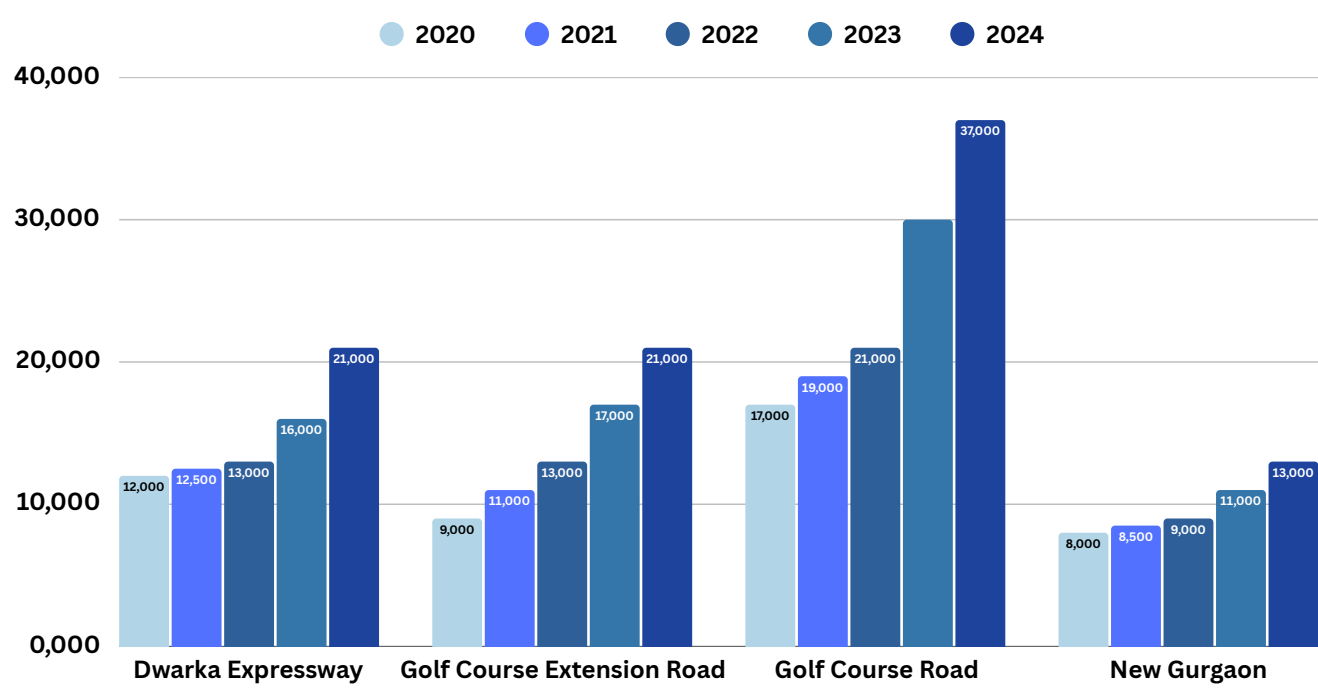
- Villas command a premium price – at **₹26,400 PSF**, they are nearly double the price of Builder Floors and significantly higher than other property types.
- Multistory Apartments are priced slightly above Builder Floors (**₹14,300 PSF vs ₹13,400 PSF, only 6.72% more**)
- Residential Houses show a sharper increase in cost (**19.58% higher than Apartments**)
- Villas see the steepest jump (**54.39% higher than Residential Houses**)



Analysis of Gurgaon Location-Wise Price Trends (2020-2024)

- **Golf Course Road Leads in Price Appreciation**
 - Highest growth, with prices surging past ₹35,000 PSF in 2024.
 - Premium location
 - Luxury Projects
 - Corporate Hubs
 - Strong Infrastructure.
- **Golf Course Extension Road Witnesses Steady Growth**
 - Prices have risen consistently, crossing ₹20,000 PSF in 2024.
 - Increasing demand due to proximity to Golf Course Road
 - Improved Connectivity.
 - Emerging Luxury and Mid-Segment Hotspot.
- **Dwarka Expressway Gains Momentum**
 - Prices have grown significantly, nearing ₹20,000 PSF in 2024.
 - Infrastructure Projects
 - Metro Connectivity
 - Expressway Completion Drive Demand
- **New Gurgaon Sees Moderate Yet Consistent Growth**
 - Emerging as an Luxury Alternative with New Residential Projects.
 - Best for Budget-Conscious Buyers and Long-Term Investors.

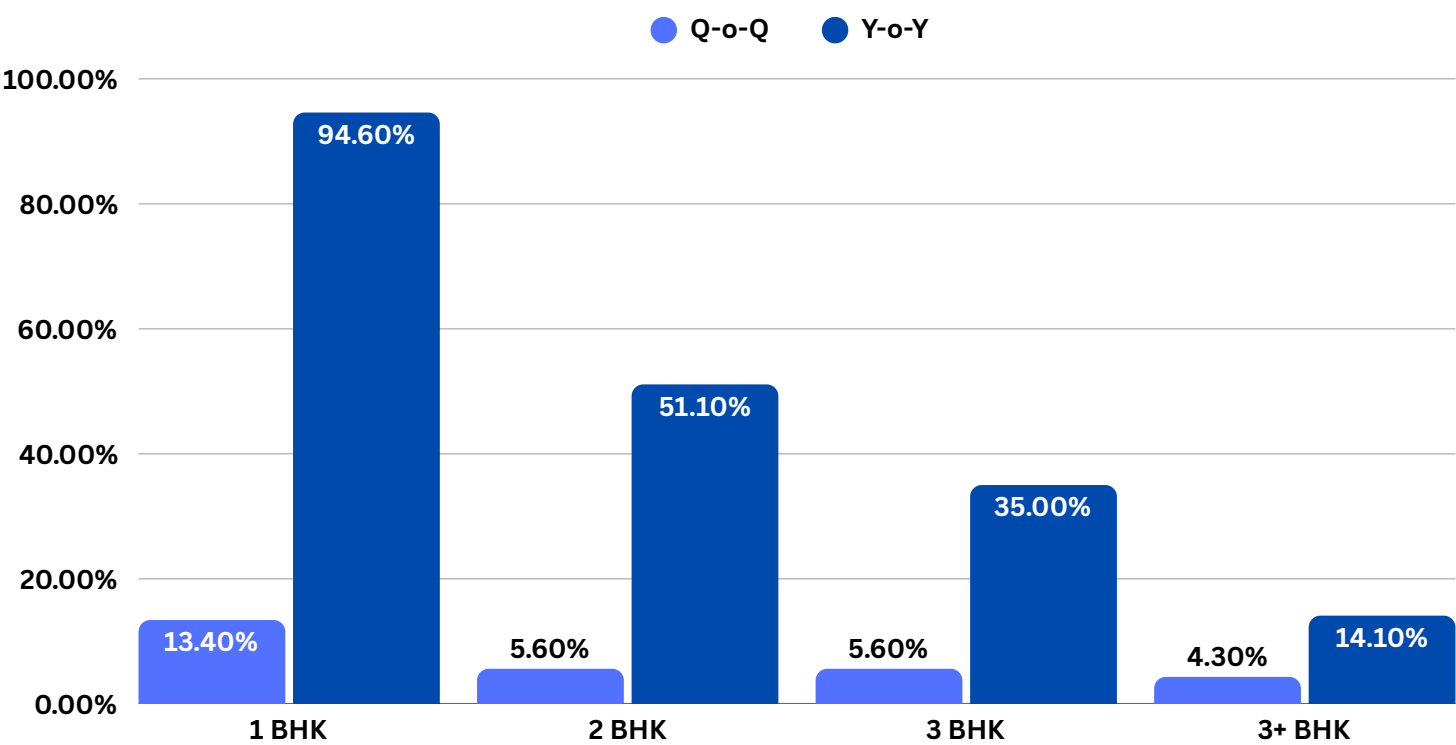
Location-wise 5 Year Average Price Trends in INR PSF)



Configuration - Wise Rate Change in INR (PSF)

- 1 BHK Shows the Highest **Y-o-Y Growth (~95%)**
- The steep rise suggests strong demand for compact, affordable housing, possibly driven by:
 - Investors targeting rental markets.
 - Migration trends favoring budget-friendly homes.
- 2 BHK & 3 BHK See Significant Y-o-Y Increases (**~50% & ~35% respectively**)
- Reflects steady appreciation, possibly due to:
 - High demand from families.
 - Increased affordability of mid-sized units compared to larger configurations.
 - Preference for homeownership post-pandemic trends.
- 3+ BHK Sees the Lowest Growth (**~15% Y-o-Y**)
 - Indicates a relatively stable or slow-moving luxury segment.
 - Limited buyer pool due to higher pricing and interest rate sensitivity.
- Q-o-Q growth is the lowest, meaning demand fluctuations are minimal.

Configuration - Wise Rate Change in INR (PSF)

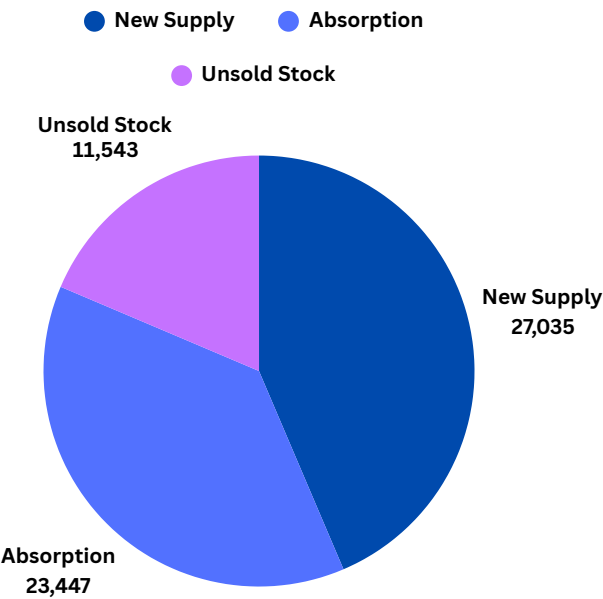


Gurugram Real Estate Market Analysis (CY 2024)

Supply and Absorption Dynamics

Metric	Value	Y-o-Y Change
New Supply	27,035 units	▲ 42%
Absorption	23,447 units	▲ 11%
Unsold Stock	11,543 units	▼ 60%

- **New supply** has grown significantly by **42%**, indicating developer confidence and strong demand.
- **Absorption (units sold)** has increased by **11%**, showing sustained buyer interest despite rising supply.
- **Unsold stock** has dropped sharply (**60%**), suggesting high sales velocity and improved market liquidity.
- Inventory overhang has reduced to just 6 months, compared to 50 months in 2016, indicating a balanced market.

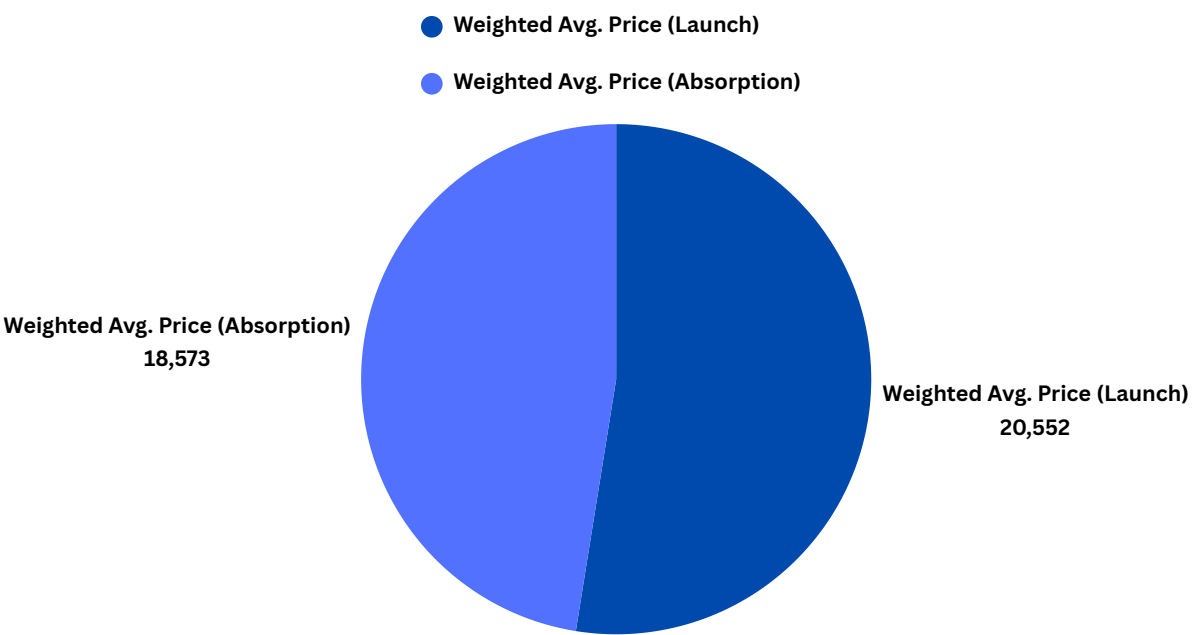


Gurugram Real Estate Market Analysis (CY 2024)

Pricing Dynamics

Metric	Value (INR PSF)	Y-o-Y Change
Weighted Avg. Price (Launch)	₹20,552	▲ 24%
Weighted Avg. Price (Absorption)	₹18,573	▲ 24%

- Both launch and absorption prices have surged by **24% year-on-year**.
- This suggests strong price appreciation, possibly driven by:
 - High demand
 - Premium Launches
 - Land Price Hikes and Construction Costs













Market Implications & Investment Takeaways

- **Short-term investors** can benefit from quick sales due to high absorption rates.
- **Long-term investors** can expect consistent capital appreciation, especially in premium and high-demand segments.
- **High absorption rates & price growth suggest a seller's market** – Good time for investors to capitalize on appreciation.
- **Faster inventory clearance indicates strong demand** – Buyers should act fast before prices rise further.
- **Price trends show resilience** – Long-term investors can expect steady capital gains.



Top 10 Developer in Gurgaon Major Market

Developer Name	LOGO	Number of years in Real Estate	No. of Projects in Gurgaon
DLF Group		77	132
Vatika		38	72
Signature Global		10	65
Emaar Group		27	54+
M3M		17	52
Godrej Properties		34	27
Tulip Group		19	15
Elan		31	11
Whiteland		26	5
Tata Housing		40	5



Mission and Vision

➔ Mission

Our mission at Estate Avenues is to exceed our client's expectations by providing exceptional and best real estate services. We strive to match people and companies with their perfect homes and ideal properties by offering personalized support, detailed project insights, and expert guidance.

➔ Vision

Our vision is to change the way people view the real estate industry especially in terms of service delivery. Our goal is to become the one stop shop that clients turn to for every aspect of real estate – Trust is in our name because we are committed to being trustworthy, creative and customer focused.

Our Approach



**Catchment
Area Analysis
& Case Studies**

**Collateral Risk
Management**

**Realty Indices
& Research &
Consulting**

**Investor
Relations &
House Loan
Assistance**



Contact Us



www.estateavenues.com



info@estateavenues.com



+91-9818839626