



Space is

of Infinite Importance

Space is

Visionary

Our Vision

To create world class industrial & logistics real estate to support the economic development of India and maximise returns for all stakeholders involved in this journey with us.

Our Mission

To remain the leader in the industrial and logistics real estate development industry by consistently providing superior solutions through our global expertise and leadership. To be the first choice as a business partner, an employer, and as an investor.

Our Values

Integrity

We promote accountability at an individual and organisational level and are governed by the highest ethical and compliance standards.

Commitment

We deliver as promised and foster an environment of effective communication.

Excellence

We strive for superior solutions, continuous improvement and innovation.

Responsibility

We promise a safe working environment, make a positive economic and ecological impact, and support the well-being of our society and nation.

IndoSpace creates the space
for businesses to realise
their vision.

INDOSPACE. BUILDING PARTNERSHIPS, BUILDING VALUE.

Space is

Essential

Current Status of the Industrial & Logistics Real Estate Sector

Acute Shortage of grade A space - estimated at less than 30 MM SF

- A significant amount of the current supply lacks required approvals
- Majority of logistics real estate in India suffers from inefficient designs, lacks international standards and has poor maintenance

There is a clear need for modern space:

- Total space requirement in top 7 markets by 2020 is 218 MM SF
- GST will lead to consolidation into larger, modern warehouses in strategic locations

IndoSpace is transforming the sector with a professionally managed pan-India portfolio of world class industrial and logistics parks.

Sources:

1. India Warehousing Market Report 2016, Knight Frank
2. CEIC Data
3. RBI and CAG
4. IndoSpace research and data
5. Everstone research and data

Demand Drivers



Fastest growing major economies with GDP growth above 6.5%, driven by domestic consumption.



Auto, chemical & pharma sectors are largest demand drivers of industrial space.



The rapid shift to online shopping will boost demand for logistics real estate from 14 MM SF > 29 MM SF.



As per estimates, warehousing space in India expected to grow @ 33% - 35% until 2020.



The current Grade A supply in India, which stands at a mere 15% of total warehousing stock, is expected to increase to 30%.



Supply chain modernisation driving demand for modern facilities.

Space is

The pioneer of modern industrial and logistics real estate in India with unmatched scale, and state-of-the-art infrastructure.

Built lasting partnerships with over 100 of the world's leading firms operating in India, providing them with a platform to scale nationally.

Largest investor, developer and manager of industrial and logistics parks in India.

With 30 MM SF of space, our national reach allows tenants to work with a single development partner for all their supply chain facility needs.

Continuously adding select new land parcels to our land bank, providing well-located logistics hubs, facilitating tenants' expansion into markets across India.

Our land parcels are conveniently located near large industrial clusters, consumption centers and major highways.

IndoSpace is a partner to leaders in manufacturing, consumer and third party logistics companies among other industries.

We are the most experienced industrial and logistics real estate development team in India.

IndoSpace

“The IndoSpace platform had everything we needed, the right locations, the right expertise and the right attitude, all under one roof. They were the logical choice for us.”

Shuji Ueno
Vice President
Nissan Motors

Space is

IndoSpace is the only company with a fund solely dedicated to the industrial & logistics real estate industry. As a joint venture between Everstone Group and Realterm, IndoSpace draws on over 20 years of global real estate development experience, and India market expertise.

IndoSpace is the largest investor, developer and manager of logistics parks in India. Our committed capital ensures IndoSpace projects are never restricted by a lack of funding.

IndoSpace is the only player with a Pan India presence with more locations rapidly underway.

Investment of over

US\$ 1 billion

Total Area (SF)

30 million

No. of Parks

28

Scale

Our Pan India Network

IndoSpace is the largest investor, developer and manager of logistics parks in India with more locations coming soon

NCR

Luhari I, Haryana
Luhari II, Haryana
Badli, Haryana
Bhaproda, Haryana

MAHARASHTRA

Chakan I, Pune
Chakan I Phase II, Pune
Chakan II, Pune
Chakan III, Pune
Chakan, Pune
Ranjangaon, Pune
Khopoli I, Mumbai
Khopoli II, Mumbai

KARNATAKA

Bommasandra, Bengaluru
Nelamangala, Bengaluru
Narasapura, Bengaluru
Narasapura II, Bengaluru

TAMIL NADU

Oragadam, Chennai
Oragadam II Phase I, Chennai
Oragadam II Phase II, Chennai
Polivakkam, Chennai
Puduvoyal, Chennai
Vallam, Chennai

Space is

Strong Partnership

Left to right (first row)

Sameer Sain
Co-Founder & Managing Partner
Everstone Capital Asia

Atul Kapur
Co-Founder & Managing Partner
Everstone Capital Asia

Kenneth S. Code
Founding Partner
Realterm

John W. Cammett
Founding Partner & CEO
Aeroterm

Left to right (second row)

Rajesh Jaggi
Managing Partner - Real Estate
Everstone Group

Brian Oravec
CEO & Partner
IndoSpace Capital Asia

“

The infrastructure provided is world class and instantly appeals to global companies like ours. I liked the concept of all the common amenities like roads, lighting, water, security, etc. being managed and maintained by IndoSpace so that we do not have to bother about all these things, and can focus on our core business...

”

Rajendra Phatak
Managing Director
ATS Automation India

EVERSTONE

One of the largest investment houses in India and Southeast Asia, serving as an invaluable gateway to capital investment and building strong businesses.

Managing funds of approximately US\$ 4 billion.

Developed over **50 MM SF** of retail, industrial, residential and commercial real estate projects across India.

Portfolio of over 30 companies in the consumer and consumer-led sectors including real estate, healthcare, retail, F&B, financial services, education and business services.

Great partnerships, combined with an active investment approach, enables Everstone to compound capital over the long term, delivering the best client outcomes.

Awarded **‘Private Equity Firm of the Year in India’** by Private Equity International for 5 consecutive years since 2011.

REALTERM

A leading North American industrial real estate firm with a global footprint.

20+ years experience developing modern industrial and logistics facilities.

Parent company of Aeroterm and North American Terminals.

World class project and construction management, site planning, building and energy efficient design.

Manages assets worth US\$ 3 billion.

Operates some of the largest, most modern facilities in the world.

Clients include: DHL, FedEx, UPS and DB Schenker, across **300 properties in North America, Europe and Asia.**

Space is

Smart

“

Highly professional team approach and committed to meet end users' requirements.

”

Nagaraja Rao

Director - Real Estate
Schneider Electric
Global Supply Chain, India

Park Infrastructure:

- State-of-the-art infrastructure with the last mile connectivity (Plug and Play)

Roads:

- International standard road network for efficient traffic movement across the park

Building Infrastructure:

- Global NFPA/FM/NBC standard fire fighting & suppression systems
- Energy efficient lighting & sky lights
- Flat/Super flat floors, FM2 compliant to support high cube racking
- Pre-cast concrete walls for speedy construction & superior finishing
- Optimised column spacing

Space is

Sustainable

Environmental Sustainability Review:

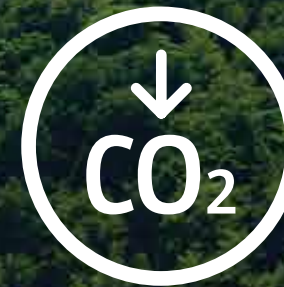
- Usage of non-hazardous materials
- Incorporating open spaces
- Green belt with tree plantations
- Rainwater harvesting
- Maintaining existing soil conditions

We are striving to create a world where the environment doesn't need protecting.

ReUse



ReDuce



ReCycle





Space is

Our best-in-class design and **international development standards** are incorporated into the build of every IndoSpace park.

We offer **ready space solutions** to customers with short lead times, that match global standards.

Each of our multi-customer developments are **in close proximity** to major highways, airports, and sea ports to meet each client's diverse distribution needs.

Our parks are specifically **designed for efficient, cost effective operations.**

Ready



“ We have partnered with IndoSpace and we have realised that they are the right people to work with. They had ready answers to all the design challenges. ”

Faisal Shaikh
Plant Manager
Steelcase

Space is

Personal

“

Delphi had a wonderful experience with IndoSpace. They are a one-stop-shop for all our requirements. Right from planning until execution they did a great job & our people were totally satisfied with their work. We have already engaged the second project with them right now.

”

Reji Varghese
President & Managing Director
Delphi India

No one business is alike. From concept to delivery and beyond, we build close partnerships with our customers to deliver customised turnkey solutions.

IndoSpace has a proven track record of always delivering on specs and on time.

We work with you every step of the way to customise each facility to suit your specific requirements, maximise your operational efficiencies, and drive business growth.

BUILD TO SUIT
Industrial /
Warehousing Units

Property
Management Services

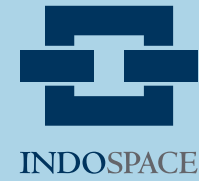
Facility Design
& Construction

Master Planning

Site Selection

Space is

a Journey



2007

Everstone and Realterm launch IndoSpace

IndoSpace Logistics Parks - USD 240MM raised, to develop modern industrial & logistics real estate

First land parcel acquired in Chakan, Pune

2010

Break ground on first development - 1.7 MM SF in Chakan Pune

Completed portfolio reaches 1 MM SF

Land bank exceeds 500 acres

2017

Launched IndoSpace Core, a JV with CPPIB, to own and operate stabilised industrial real estate. CPPIB commits US\$500 million to the JV

Completed portfolio – 8.4 MM SF
Under development – 14 MM SF
Planned – 7.6 MM SF

Current portfolio includes 24 developed and under development parks across Pune, Bengaluru, Chennai, NCR and Mumbai.

Land bank exceeds 1000 acres

2013

Completed portfolio reaches 5 MM SF

IndoSpace Logistics Parks II - USD 343MM raised, to expand portfolio of modern industrial & logistics real estate



Space is

Rewarding

We build lasting partnerships with our clients providing them with the ability to scale nationally.



... and many more



Industrial/Warehouse Developer in India 2017
Ranked no.1 by Euromoney magazine for three years in a row



Star Warehousing Company of the Year 2017
As a part of ELSC Leadership Awards



Best Industrial & Logistics Infrastructure Player 2017
At the CII supply Chain & Logistics Excellence (SCALE) National Awards



Pioneer of Modern Industrial and Logistics Parks in India 2016
By Hamburg Media



Warehousing Company of the Year 2016
At the CII Supply Chain & Logistics Excellence (SCALE) Awards



Warehousing Excellence Innovation Award 2016
Recognition received at the 10th Express Logistics & Supply Chain Conclave

Space is

Operational Parks – NCR



Location Luhari I, Haryana
Area 9,30,000 SF



Location Luhari II, Haryana
Area 6,50,000 SF

** All area statements have been rounded for ease of reading.*

Excellence



IndoSpace Luhari, NCR

Space is

Excellence

Operational Parks – Maharashtra



Location Ranjangaon, Pune
Area 25,43,000 SF



Location Chakan I, Pune
Area 18,25,000 SF



Location Chakan II, Pune
Area 9,65,000 SF



Location Chakan III, Pune
Area 17,95,000 SF

** All area statements have been rounded for ease of reading.*



IndoSpace Chakan I, Pune

Space is

Excellence

Operational Parks – Tamil Nadu



Location Oragadam, Chennai
Area 14,80,570 SF



Location Polivakkam, Chennai
Area 9,53,000 SF



Location Pudukottai, Chennai
Area 3,15,000 SF



Location Vallam, Chennai
Area 8,60,000 SF

IndoSpace Oragadam, Chennai

** All area statements have been rounded for ease of reading.*

Space is

Excellence

Operational Parks – Karnataka



Location Bommasandra, Bengaluru

Area 7,75,000 SF



Location Nelamangala, Bengaluru

Area 4,30,000 SF

IndoSpace Bommasandra,
Bengaluru

** All area statements have been rounded for ease of reading.*



Corporate Office

IndoSpace Development Management
One India Bulls Center, 11th Floor, Tower 2A,
Elphinstone Road, Senapati Bapat Marg,
Mumbai - 400 013.
Landline: +91 22 6167 1001

For Leasing Inquiries

Email: leasing@indospace.in
Mobile: +91 74001 00222
www.indospace.in

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