



TERRA ECONOMICS AND ANALYTICS LAB



TEAL Analytics

**Sale - Lease Report
April - May, 2022**

Delhi - Ghaziabad - Noida

***Affordable Housing Drives Property
Sales Demand***

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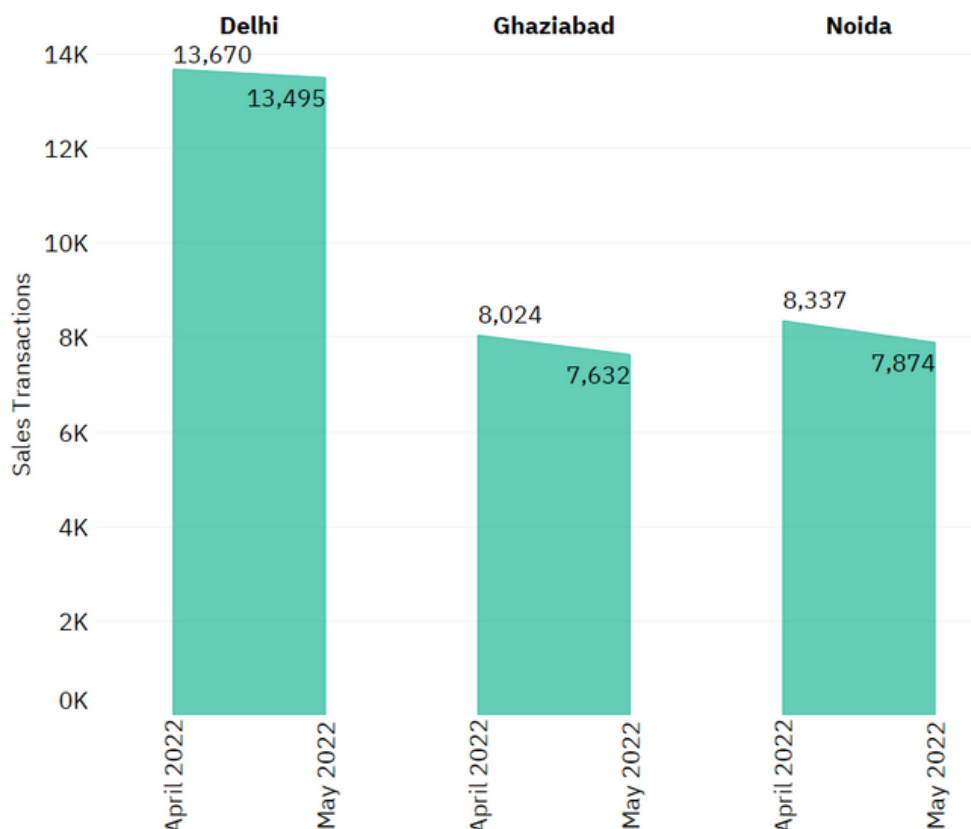
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SUMMARY

The property sales market in Delhi , Ghaziabad and Noida witnessed a marginal decline in transaction volume during May 2022, compared to April 2022. Noida noted the most decline relative to other geographies observed, with a decrease of 5.55% MoM, while Delhi saw the least decline of 1.28% MoM.

Noida Saw the Most Decline in Sales MoM

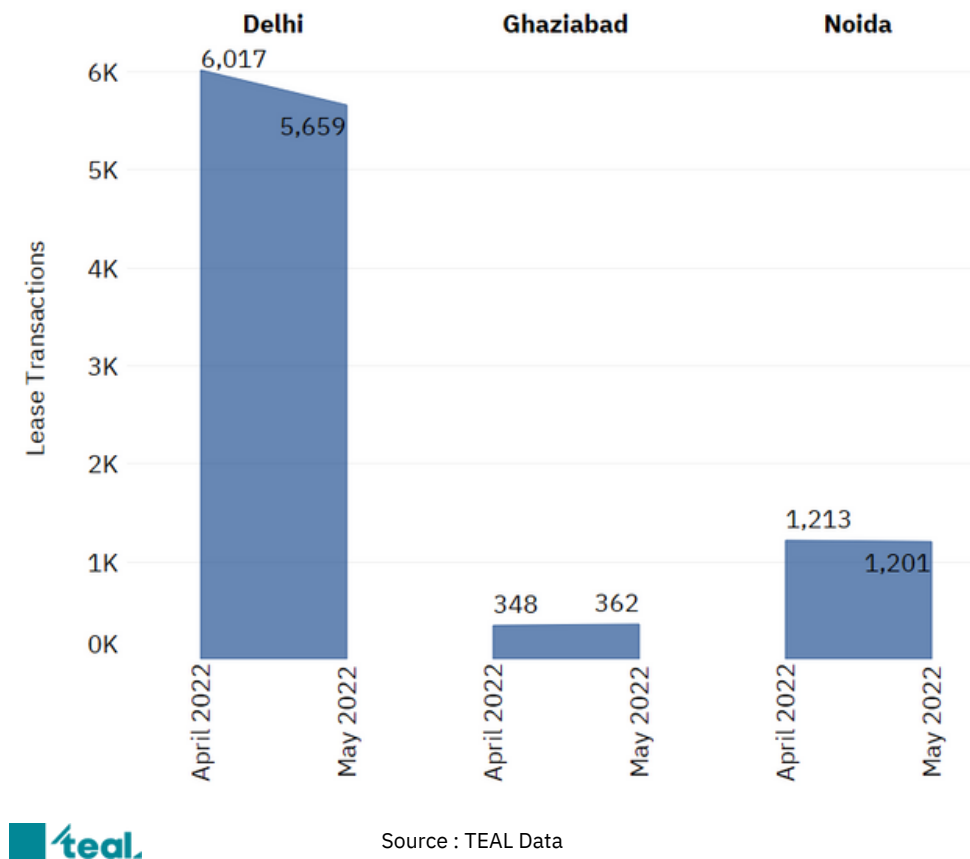


Source : TEAL Data

TEAL is India's largest repository of real estate data. At TEAL, we leverage cutting-edge big data analytics and machine-learning to power our range of due diligence products and valuation tools. Our data repository covers title documents, municipal and litigation records, RERA registration details among other data points in Delhi-NCR, the Mumbai Metropolitan Region, Pune, Bangalore, Hyderabad, Warangal, Chennai, Coimbatore and other cities in Maharashtra.

For the purposes of this report we have placed reliance on digital data made publicly available by the respective state government within whose jurisdiction the property is situated. TEAL doesn't change the substance of the underlying data made publicly available by the respective state government while producing the this report. Terralytics Analysis Private Limited shall not take any responsibility for any information in the report which may be later found to be factually incorrect.

Lease Activity in Delhi and Noida Has Seen a Decline



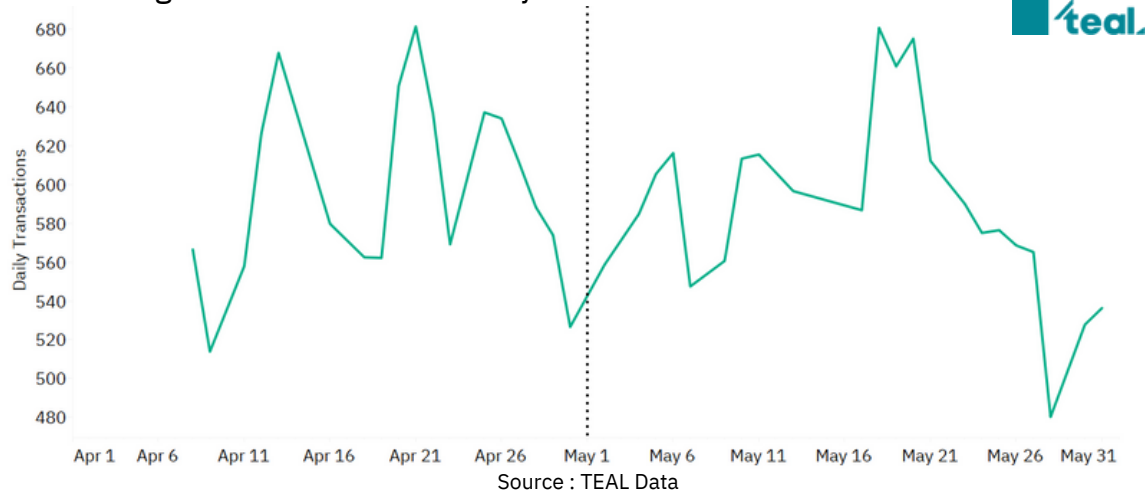
Leasing activity shows a decline in Delhi and Noida. Whereas, Ghaziabad has seen a slight incline. **Delhi showed greater decrease of 5.95% MoM**, while Ghaziabad showed an incline of **4.02% MoM**. There is room for optimism as more and more educational institutes and offices re-open their doors for in-person attendance after an extended period of working from home.

For the purposes of this report we have placed reliance on digital data made publicly available by the respective state government within whose jurisdiction the property is situated. TEAL doesn't change the substance of the underlying data made publicly available by the respective state government while producing the this report. Terralytics Analysis Private Limited shall not take any responsibility for any information in the report which may be later found to be factually incorrect.

Delhi

Property Sales Activity - April 2022 vs May 2022

Delhi Saw a Slight Decline in Sales in May 2022



13,495

Number of registered
sales transactions in May
2022.

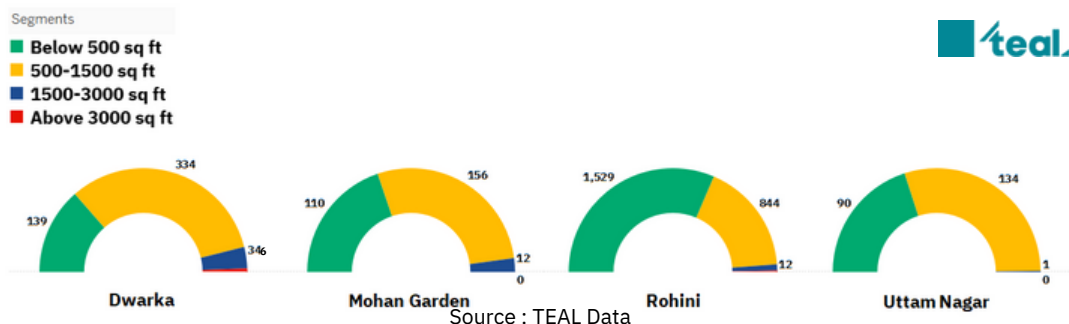
-1.28%

MoM change in property
sales volume compared
to April 2022.

Key Localities for Residential Property Sales

Dwarka and Rohini recorded the highest residential property sales transactions in May 2022 with 513 and 2432 transactions respectively.

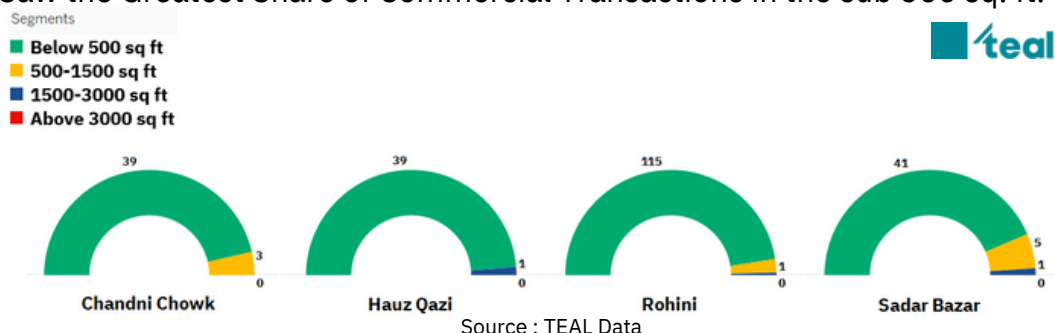
Rohini Saw the Greatest Share of Residential Transactions in the sub 500 sq. ft. Segment



Key Localities for Commercial Property Sales

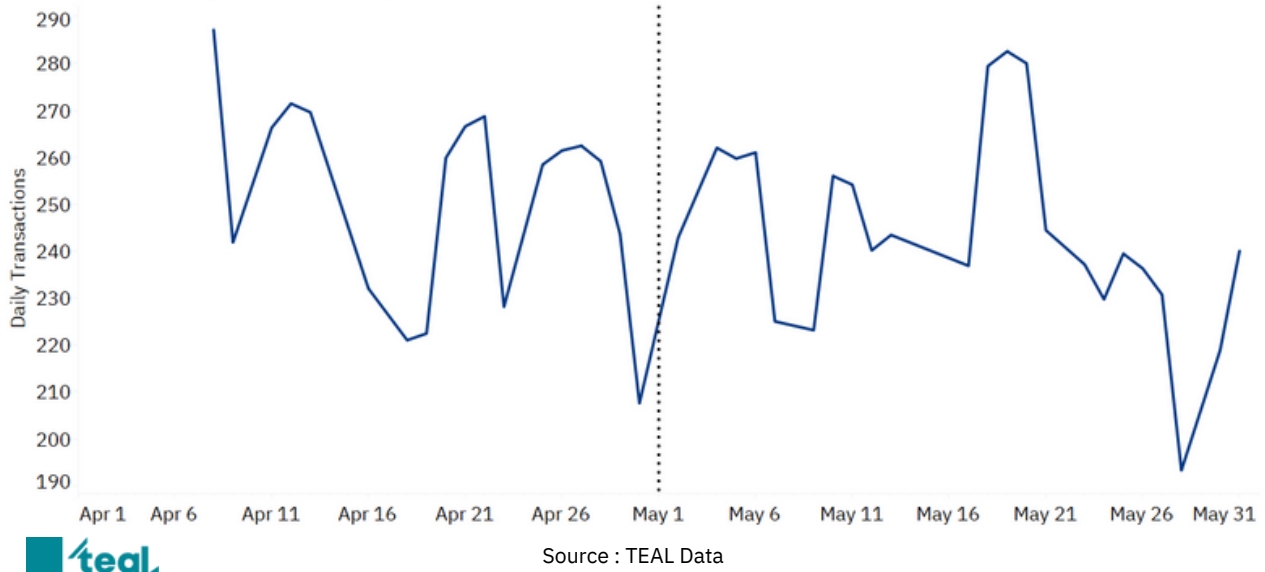
Rohini and Sadar Bazar recorded the highest commercial property sales transactions in May 2022 with 121 and 47 transactions respectively.

Rohini Saw the Greatest Share of Commercial Transactions in the sub 500 sq. ft. Segment



Property Lease Activity

Lease Activity in Delhi Has Seen a Slight Decline in May 2022



58.6%

of the overall registered lease transactions were in the Residential Market

36.2%

of the overall registered lease transactions were in the Commercial Market

5,659

is the total number of lease transactions in Delhi in May 2022

976.86 sq. ft.

is the average property size of residential properties for lease in Delhi in May 2022

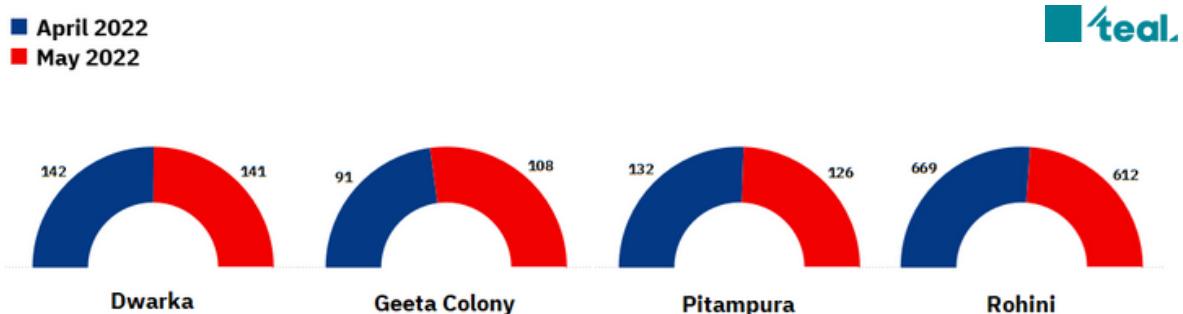
966.83 sq. ft.

is the average property size of commercial properties for lease in Delhi in May 2022

Key Localities in the Lease Transactions

Rohini saw the most number of lease transaction in May 2022 with 612 transactions, and 669 transactions in April 2022.

Rohini Saw the Most Registered Lease Transactions

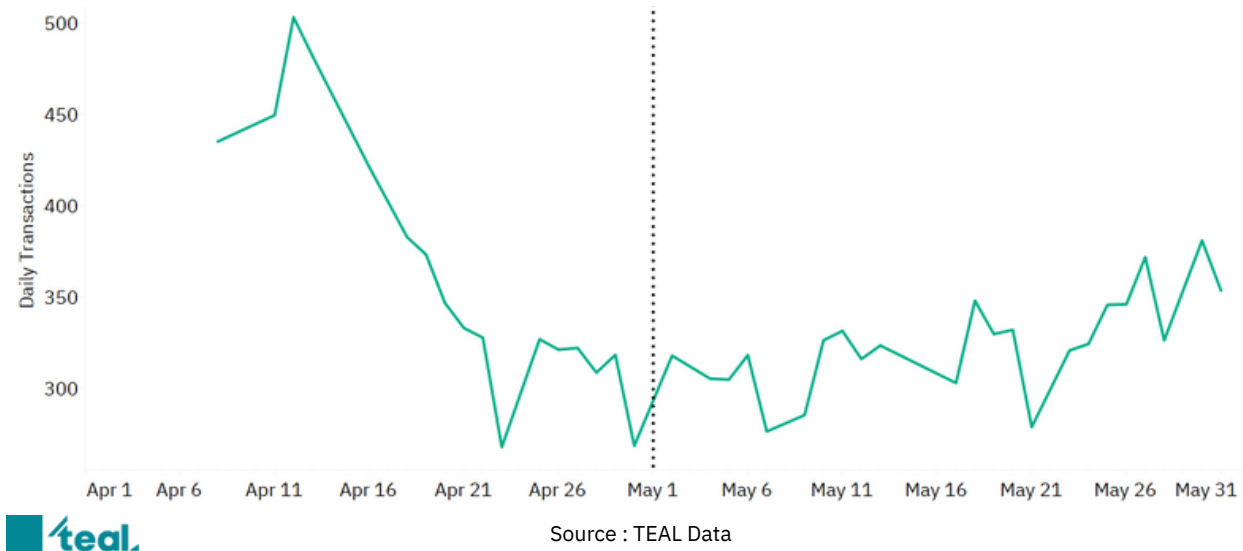


Source : TEAL Data

Ghaziabad

Property Sales Activity - April 2022 vs May 2022

Ghaziabad Has Seen a Marginal Decline in Sales in May 2022



7,632

Number of registered sales transactions in May 2022.

-4.88%

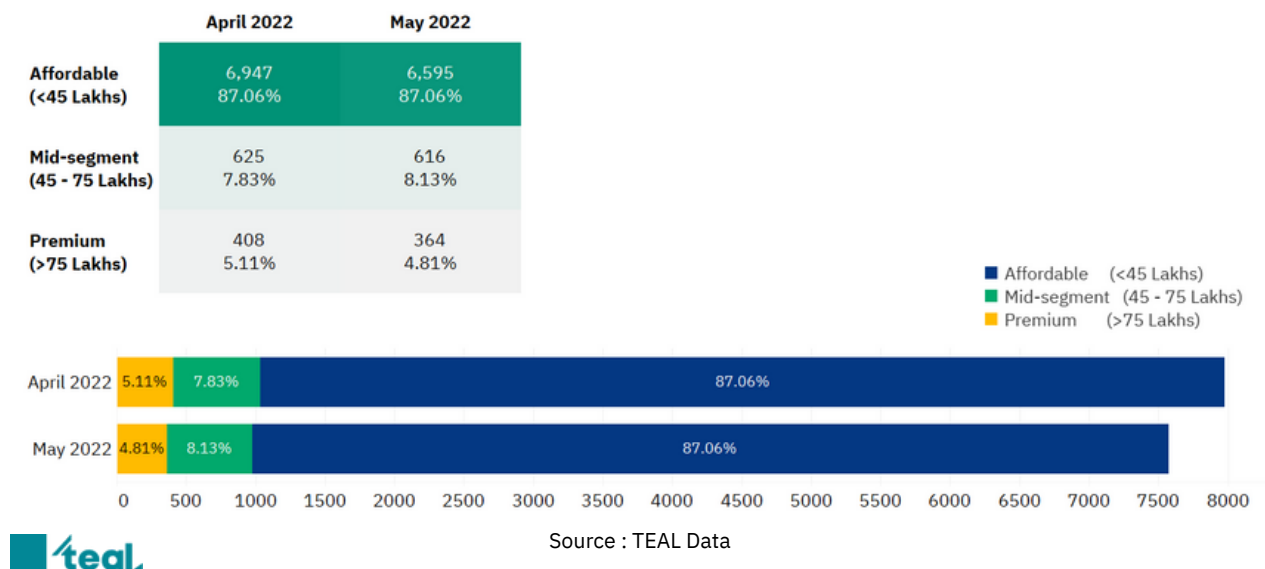
MoM change in property sales volume compared to April 2022.

Property Sales by Market Segment

Ghaziabad witnessed maximum sales volume in the **Affordable segment**. The **segment share** of Affordable properties stood at **87.06%** of overall sales in **May 2022**, a figure that was maintained in the previous month. In contrast, the segment share of **Premium** properties stood at 4.81%, a figure that **saw a slight decline** from 5.11% in the last month.

The market share of Affordable property sales and Mid-Segment property sales were higher in May, with the respective shares standing at 87.06% and 8.13% that month. April saw higher share of Premium property sales, with the shares standing at 5.11%.

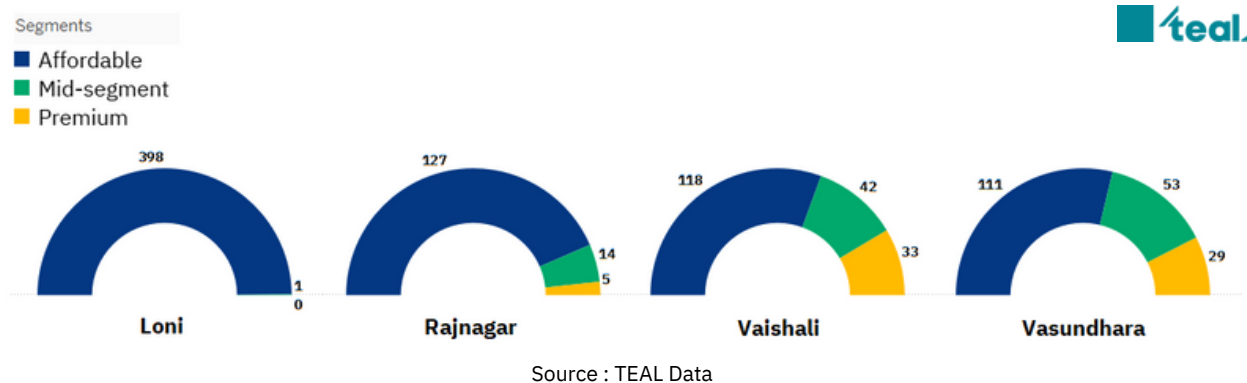
Affordable Segment Continues to Drive Property Sales in Ghaziabad



Key Localities for Property Sales

Loni recorded the highest property sales transactions in May 2022 with a total of 399 Sales Transactions.

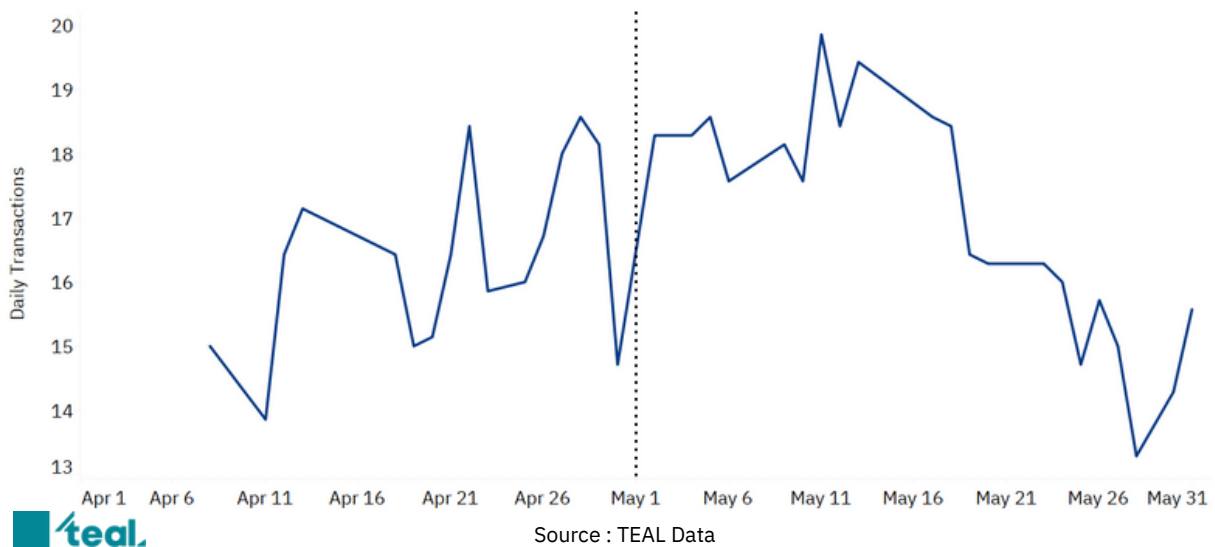
Loni Saw the Most Sales in Affordable Segment



- Loni also saw the greatest share of sales in the affordable segment with 99.75% of its sales falling in the sub 45 lakh bracket.
- Other localities that drove sales volume included Rajnagar, Vaishali, and Vasundhara.

Property Lease Activity

Lease Activity in Ghaziabad Has Seen an Incline in May 2022



Smaller Properties Continue to Take Precedence

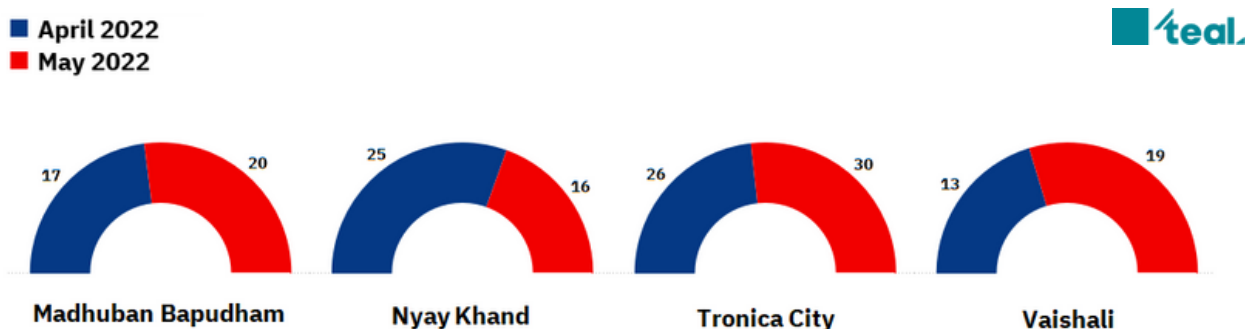
	April 2022	May 2022
Below 500 sq ft	62	57
500-1500 sq ft	17	18
1500-3000 sq ft	12	16
Above 3000 sq ft	47	40

362 is the total number of registered lease transactions in May, 2022

Key Localities in the Lease Transactions

Tronica City saw the most number of lease transactions in May 2022 with 30 transactions, and 26 transactions in April 2022.

Tronica City Saw the Most Registered Lease Transactions

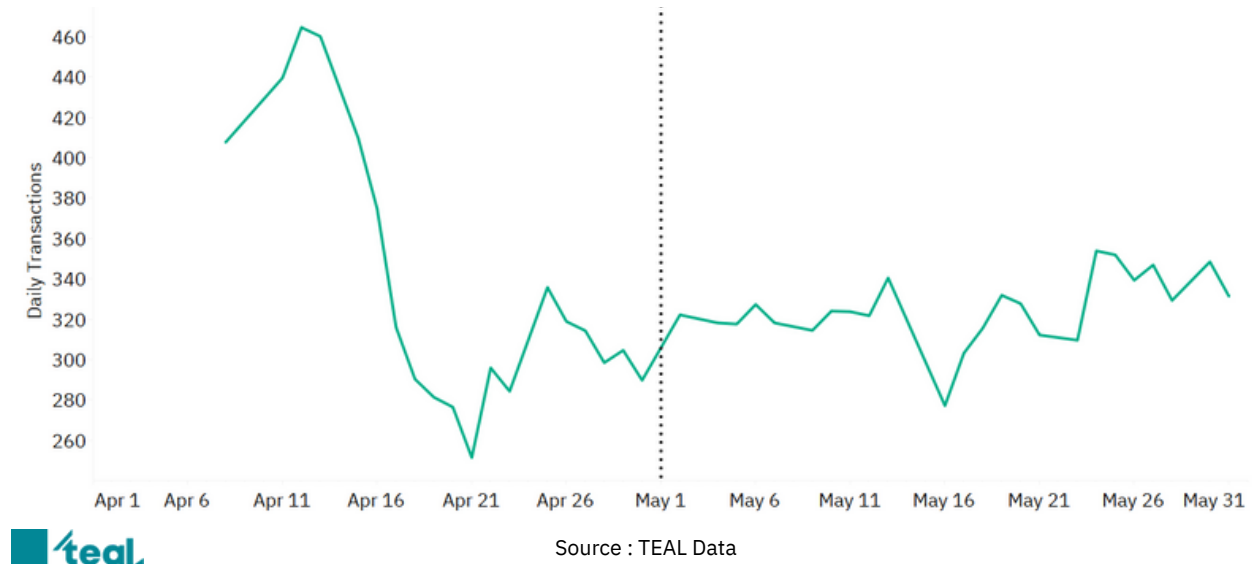


Source : TEAL Data

Noida

Property Sales Activity - April 2022 vs May 2022

Sale Activity in Noida Saw a Decline in May 2022



7,874

Number of registered sales transactions in May 2022.

-5.55%

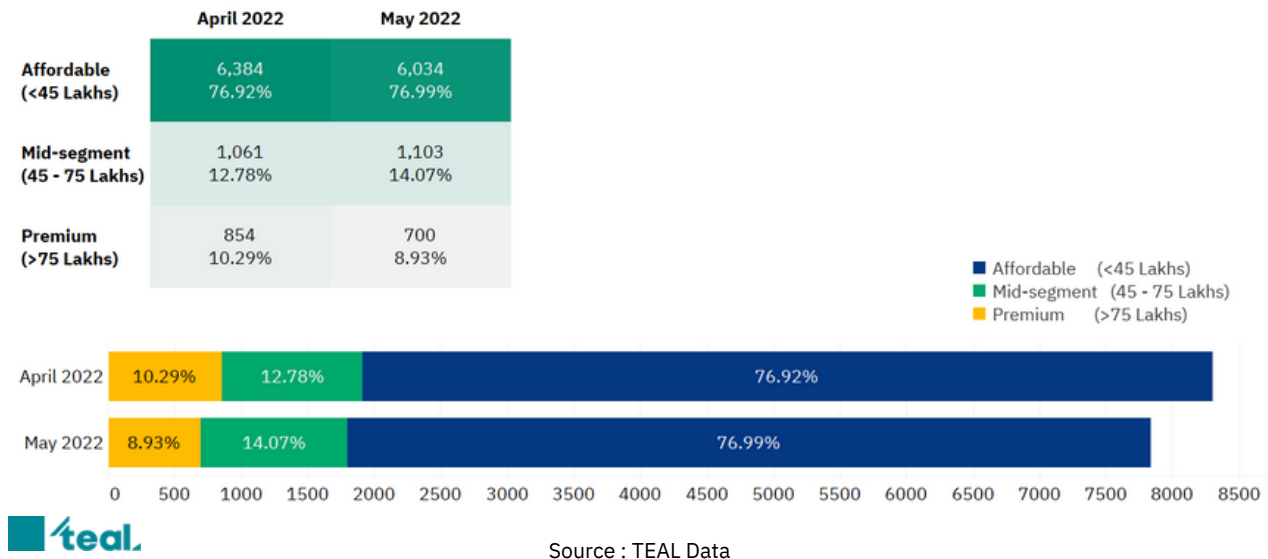
MoM change in property sales volume compared to April 2022.

Property Sales by Market Segment

Following suit from what was seen in Ghaziabad, **Noida also witnessed maximum sales volume in the Affordable segment.** The **segment share** of Affordable properties stood at **76.99%** of overall sales **in May 2022**, a figure that saw a slight growth from 76.92% in the previous month. In contrast, the segment share of Premium properties stood at 8.93%, a figure that saw a slight decline from 10.29% in the last month.

The market share of Affordable property sales and Mid-Segment property sales were higher in May, with the respective shares standing at 76.99% and 14.07% that month. April saw higher share of Premium property sales, with the shares standing at 10.29%.

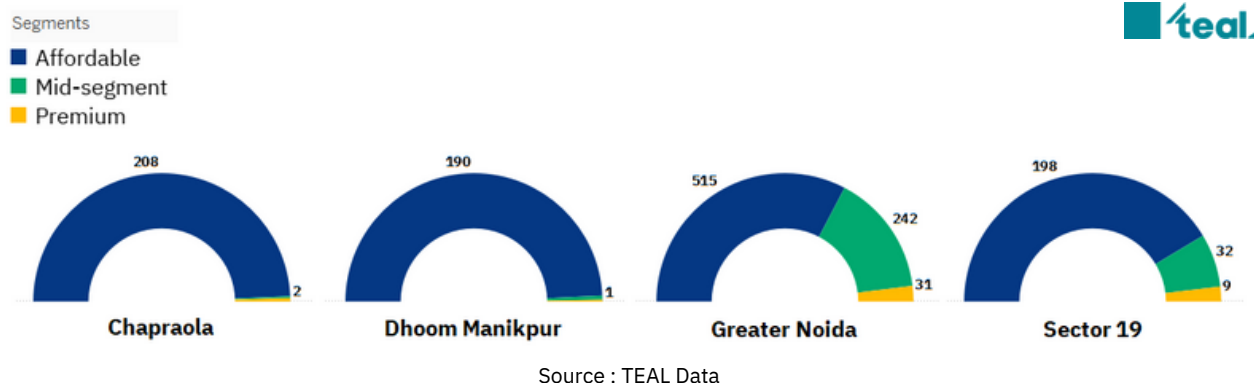
Affordable Segment Continues to Drive Property Sales in Noida



Key Localities for Property Sales

Greater Noida recorded the highest property sales transactions in May 2022 with 515, 242 and 31 transactions in the Affordable, Mid-segment and Premium markets respectively.

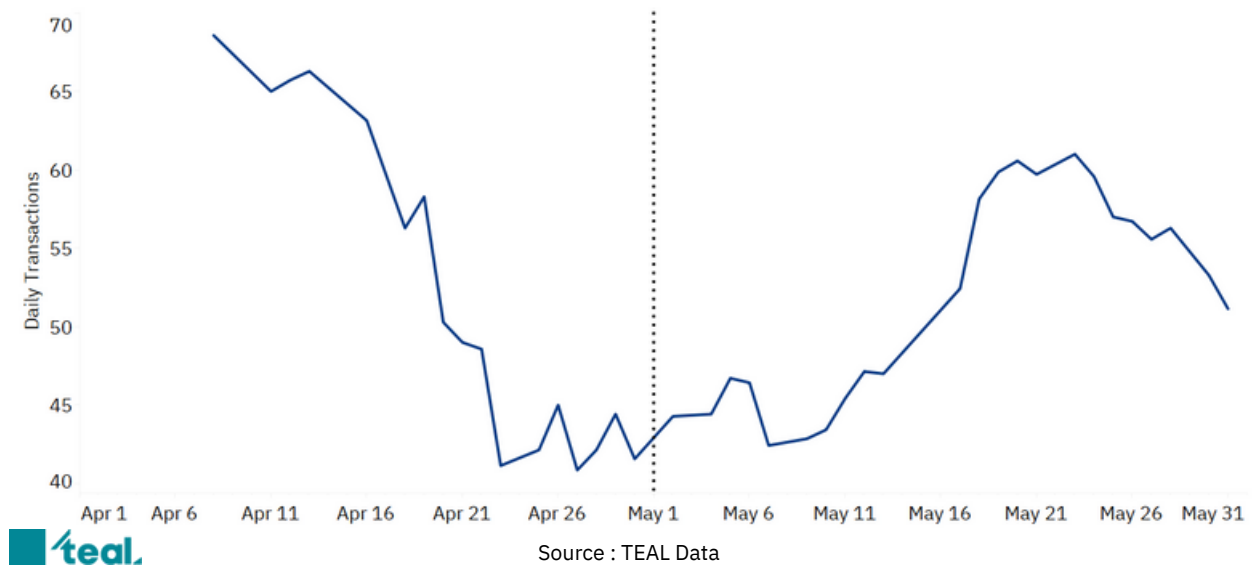
Chapraola saw the Most Sales in Affordable Segment



- Chapraola saw the greatest share of sales in the affordable segment with 98.57% of its sales falling in the sub 45 lakh bracket.
- Other localities that drove sales volume included Dhoom Manikpur and Sector 19.

Property Lease Activity

Lease Activity in Noida Has Seen a Slight Decline in May 2022



Larger Properties Continue to Take Precedence

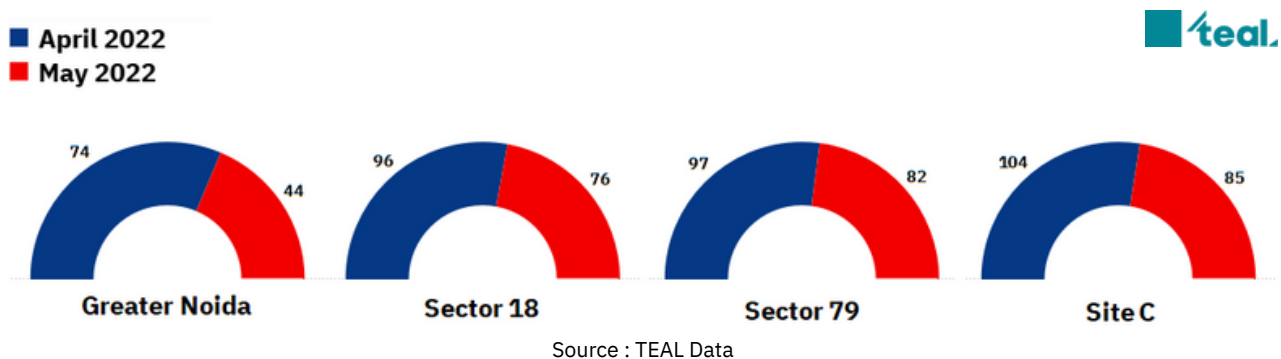
	April 2022	May 2022
Below 500 sq ft	90	65
500-1500 sq ft	124	113
1500-3000 sq ft	108	99
Above 3000 sq ft	188	218

1,201 is the total number of lease transactions in May, 2022

Key Localities in the Lease Transactions

Site C saw the most number of lease transactions in May 2022 with 85 transactions, and 104 transactions in April 2022.

Site C Saw the Most Registered Lease Transactions



MARKET UPDATES

Delhi RERA makes registration of real estate projects constructed on more than 500 sq mt land compulsory [1].

The Municipal Corporation of Delhi (MCD) has discontinued any manual correspondence pertaining to mutation of properties, and the entire process is totally online now [4].

Buying property in Delhi to get costlier after a 1% hike in transfer duty on properties above ₹25 lakhs [2].

Uttar Pradesh Government has decided to do away with stamp registration duty of 7% if property is transferred to family members [5].

The Delhi government is likely to extend the rebate of 20 per cent on circle rate of land and immovable property for another six months to boost the real estate sector in the city [3].

A hike in Goods and Services Tax (GST) rates on bricks, from 5% to 12%, has hit thousands of kilns across Uttar Pradesh [6].

REFERENCES

[1]<https://www.moneycontrol.com/news/business/real-estate/delhi-rera-makes-registration-of-real-estate-projects-constructed-on-more-than-500-sq-mt-land-compulsory-8426571.html>

[2]<https://www.livemint.com/news/india/buying-property-in-delhi-to-get-costlier-transfer-duty-hiked-11654067718506.html>

[3]<https://realty.economictimes.indiatimes.com/news/industry/delhi-government-likely-to-extend-rebate-on-circle-rate-by-six-months/92399667>

[4]<https://realty.economictimes.indiatimes.com/news/technology/property-mutation-goes-fully-online-no-manual-process-allowed-now-in-delhi/92159067>

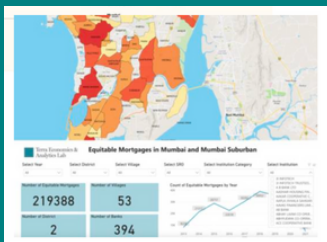
[5]<https://realty.economictimes.indiatimes.com/news/industry/uttar-pradesh-waives-stamp-duty-if-property-transferred-to-family-member/92242692>

[6]<https://realty.economictimes.indiatimes.com/news/allied-industries/brick-cost-up-by-rs-1-gst-hike-hits-kilns-across-uttar-pradesh/90820324>

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TEAL Real Estate Analytics Suite leverages our unmatched access to real estate data to produce actionable insights that give you an immediate competitive edge in the market. Our analytics is driven by key parameters and determinants relied upon by leading players in the real estate and allied sectors including developers, aggregators, and lenders. Our state-of-the-art data aggregation, cleaning, and ingestion processes deploy cutting-edge natural language processing, artificial intelligence, and machine-learning capabilities to standardize data from diverse datasets to power your insights. Get in touch with us directly to know how we can answer the following questions and more:

- **Bank and HFC wise mortgage distributions**
- **Housing sales and mortgages by price range**
- **Developer wise sold and unsold inventory units**
- **Office and retail lease insights**
- **Micro-locality level lease rate per sq. ft.**

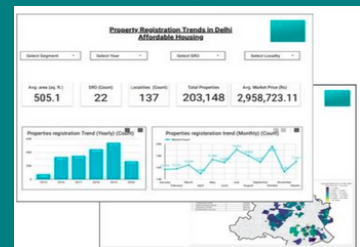


Transaction Monitor

Explore in-depth real estate market movements through our Transaction Monitor. Transaction Monitor captures information on inventory movement, mortgage lending, rentals, and leases at the pin code level. Annualised and monthly visualizations allow you to identify growth areas and underserved markets with unparalleled ease

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On demand micro-market reports take a no-stone untouched approach to analysing selected localities on demand. These reports include demographic profiles, historic transaction trends, and key-market determinants such as local infrastructures, upcoming projects, etc. to provide in-depth evidences and compare the attractiveness of local markets.

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