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INTELLIGENT INVESTMENT

Manufacturing Manual 2026: Inside India's Automotive Playbook

INDIA

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SEPTEMBER 2026

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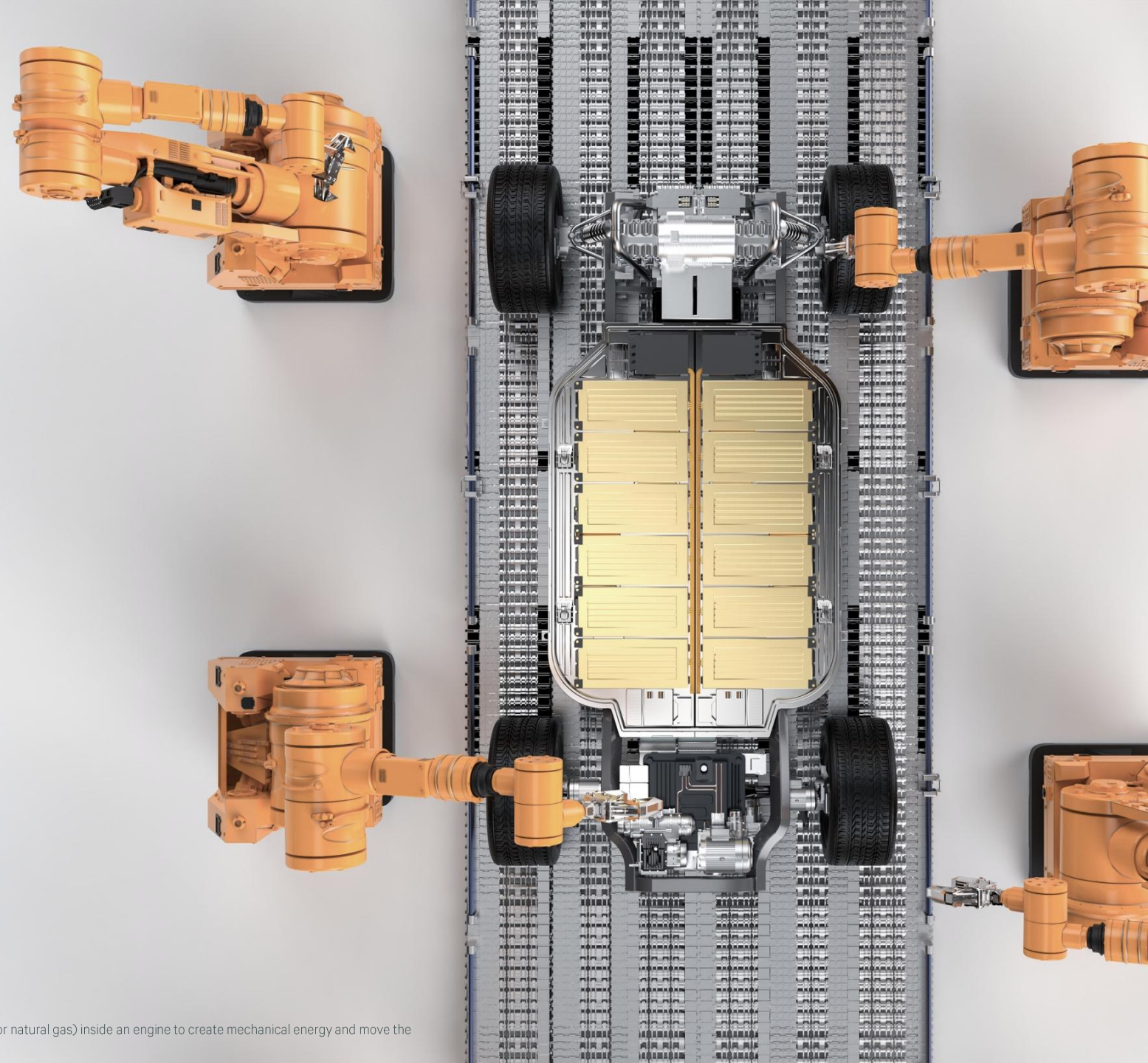
Executive Summary

India's automotive sector has long been anchored by the scale of its domestic market and a well-established manufacturing base across vehicles and components. That foundation is now being complemented by stronger exports, wider access to overseas markets and expansion across EVs, batteries and advanced components, broadening both the production mix and integration with global value chains.

CBRE Research's 2025 Manufacturing Manual examined the wider modernisation of India's industrial ecosystem and the factors influencing manufacturing investment and location decisions. This second edition focuses on the automotive sector, tracing activity across leading states and clusters and examining how technology, supply chains and export orientation are influencing real estate requirements.

India already has considerable depth in ICE* vehicle assembly and conventional auto components. EV manufacturing adds another layer, with greater scope for localisation across battery cells, power semiconductors, critical minerals and related technologies. This wider manufacturing base is creating more varied requirements for industrial land, utilities, supplier access, logistics infrastructure, facilities and workforce capabilities.

Location decisions are also becoming more multidimensional. Mature OEM and supplier ecosystems remain important, but connectivity, industrial real estate availability, infrastructure readiness, utilities and ease of execution are also critical. The report benchmarks leading automotive states across these factors and sets out priorities for occupiers, developers and policymakers. Taken together, the analysis reflects a sector still rooted in domestic demand, but with a stronger export orientation through a wider technology base.



1. An ICE (Internal Combustion Engine) is a conventional vehicle that is powered by burning fuel (such as gasoline, diesel, biofuels, or natural gas) inside an engine to create mechanical energy and move the vehicle.

Contents

01

India’s Automotive Opportunity

02

India’s Automotive Manufacturing Clusters

03

The Real Estate Intersect: Auto & Ancillary Footprint

04

Automotive Site Selection Priorities

05

Action Framework: Policy, Real Estate, and Execution Priorities





01

India’s Automotive Opportunity

Export potential, domestic demand and electrification are broadening the sector’s manufacturing base

Where India Stands

India's has a domestic-first automotive ecosystem where exports comprise a limited share of total production. CBRE has benchmarked India against Southeast Asian peers such as Vietnam, Thailand and Indonesia because they sit at a directly comparable structural inflection point. As global OEM asset allocations shift under accelerating **"China+1" diversification** and regional EV supply-chain realignments, India, Vietnam, Thailand, and Indonesia are actively competing for the same incremental capital, factory footprints, and supplier relocations.

This comparison deliberately excludes established automotive powers such as China, Germany, or Japan, because they have a fundamentally different market structure where auto manufacturing is built around global export scale and decades of entrenched supply-chain depth.

POLICY SHIFT

FROM
High auto tariffs + Strict SEZ norms

TO
Reciprocal trade + hybrid SEZ hubs

OPENING OUTWARD

India is taking initial steps towards more reciprocal automotive trade. For instance, under the EU agreement, tariffs on Indian EVs are set to phase down to zero over ten years, while India would reduce its car tariffs from 110% to 10% (quota-based) and eliminate component tariffs over 5-10 years).

OPENING EXPORT ZONES

The Union Budget 2026–27 introduced a time-bound measure (effective April 2026 to March 2027) permitting eligible SEZ units to sell a capped portion of their output into the domestic tariff area (DTA) at concessional customs duty rates. While this provides immediate relief to impacted units, the broader SEZ 2.0 reform aims to permanently reposition SEZs as hybrid 'Development Hubs' serving both domestic and export markets.



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Is India's Automotive Sector Shifting Gears towards Exports?

India vs. APAC Peers

	INDIA	VIETNAM	THAILAND	INDONESIA
Domestic Consumption + Export Orientation	~81% of vehicle production (20+ million units) was absorbed domestically in FY2026[1]	Domestic demand-led, relatively low localisation; ~70% of CY2023 vehicle sales were assembled in Vietnam, but only 20% contained local parts[2]	Strong regional export base with moderate local demand; ~58% in Jan – Jun 2026: production 717,212 units / 421,144 units exported (broadly consistent % share as Jan-Jun 25)[3]	Export-oriented, with a strong component base; total 2025 automotive production volume: ~1.15 million units, Export volume: CBU[4] 518,212 units, CKD[5] 63,263 units, ~142 billion component pieces[6]
Free Trade Agreement (FTA) Strategy	**9 FTAs covering 38 countries[7]** India-UK CETA in force since July 2026 (providing zero-duty access for ~99% of India's exports)[8]; calibrated automotive liberalisation through India-EU FTA (Jan 2026) providing access to the EU market, with auto tariffs reducing from 110% to 10% over time, components to zero)[9]	**17 FTAs with 50+ nations[10]** RCEP (Regional Comprehensive Economic Partnership) covers ASEAN countries, China, Japan, South Korea, Australia, and New Zealand. Its tariff advantages include harmonising Rules of Origin across all 15-member states[10]	**17 FTAs with 24 partners[11]** Motor vehicles for transporting goods were among the five product categories with the highest use of FTA privileges in April 2026. Key agreements include ATIGA (ASEAN), ACFTA (ASEAN-China), AIFTA (ASEAN–India), JTEPA (Thailand–Japan) and TAFTA (Thailand–Australia)[12]	**20 FTAs[13]** Under ATIGA (ASEAN), cars imported from ASEAN enjoy zero percent import duty until 2027[14]

Source: 1. Automobiles, India Brand Equity Foundation, February 2026; 2. Vietnam Automotive Industry in 2025: Growth, Tariff Impacts and Outlook, Vietnam Briefing (Dezan Shira & Associates), May 2025; 3. The Thai Automotive Industry Association, Aug 2026; 4.CBU (Completely Built Unit) – A fully assembled vehicle exported as a single piece; 5. CKD (Completely Knocked Down) – An unassembled vehicle kit of parts / components exported which is then assembled in the destination country's local factory; 6. Indonesian Automotive Industry Data (GAIKINDO), December 2025; 7. India's achievements in Free Trade Agreements for the year 2025-26, PIB, Mar 2026; 8. India–UK CETA Comes into Effect; PIB, July 2026; 9. India–EU Free Trade Agreement Concluded: A Strategic Breakthrough in India's Global Trade Engagement, PIB, January 2026; 10. The Definitive Guide to Vietnam's 17 Active Free Trade Agreements – FTAs in 2026, April 2026; 11. Thailand Secures Landmark Trade Expansion with 17 Global Agreements in Total, The Government PR Department, Dec 2025; 12. Thailand's exports benefit from growing use of FTA privileges, Vietnam Plus, July 2026; 13. Indonesia Has 20 Foreign Trade Agreements, Including the CEPA and FTA, CNN Indonesia, Oct 2025; 14. Cars imported from ASEAN enjoy zero percent import duty till 2027, The Socialist Republic of Vietnam Government News, January 2023

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Key Benchmarks

India vs. APAC Peers

	INDIA	VIETNAM	THAILAND	INDONESIA
Cost of Industrial Land	~USD 1.71 – 2.12 million / acre across established Pune MIDC allotments, private land in Pune ~USD 2.1 – 3.7 million / acre [1]	Tier-1 Northern Region[4] - USD 143 / sq. m. / remaining term[1] Tier-1 Southern Region[4] - USD 185 / sq. m. / remaining term[1]	~USD 152,000-425,300 / rai for Serviced Industrial Land Plot (SILP) in the Eastern Economic Corridor (EEC) area (Chonburi and Rayong)[1]	~USD 85.7 - 194 / sq. m across Cikarang, Karawang, Purwakarta, Cikampek, Subang[8]
Corporate Income Tax (CIT)	25.17% standard rate as per Section 115 BAA[2]	20% standard, however, rates as low as 10% - 17% for up to 15 years for automotive & ancillary dependent on project scale, location, and eligibility criteria[5]	Flat 20%, with BOI (board of investment) exceptions of up to 13 years for selected/targeted eligible business activity e.g., R&D[7]	22% with up to 50% CIT reduction or full exemption (up to 20 years) for pioneer sectors[7]
Land Ownership	Hybrid: Freehold (private land) and leasehold (SEZs / industrial zones)[1]	Land-use rights through land lease arrangements, through state / subleases from industrial park developers (50 – 70 years)[6]	Leasehold, but includes BOI land-ownership rights for promoted projects[1]	All companies (domestic and foreign owned) entitled for HGB[9] (similar to leasehold) rights, HM[10] (freehold) rights only for local individuals
FDI in Manufacturing	100% automatic route for automotive / EV[3]	100% foreign ownership in most manufacturing sectors, subject to applicable licensing and regulatory requirements	100% permitted for BOI-promoted projects (applies to both Thai and foreign-owned companies)[1]	100% permitted for PT PMA[11] structures
	Largest domestic demand base and PLI incentives; state-level variation remains a challenge	**Lower unit cost and faster of industrial-park turnaround,** but capped land tenure and rising rents	**Strongest tax holiday structure,** but smaller domestic market	**Largest domestic market in ASEAN,** but with longer logistics lead times to global ports

Source: 1. CBRE Research, H1 2026 2. Income Tax Department, Government of India, AY 2026-27 3. Revolutionizing Mobility, Ministry of Commerce & Industry, March 2025 4. Tier-1 Northern Region includes Hanoi, Hai Phong, Hai Duong, Hung Yen and Bac Ninh & Tier-1 Southern Region includes HCMC, Binh Duong, Duong Nai, Long An; 5. Vietnam Corporate – Taxes on corporate income and Vietnam Corporate - Tax credits and incentives, PWC, March 2026.; 6. Bui, N.A. and Pham, T. (2025). Expiry of Land-Use Projects with a Term of 50 Years or Less. VILAF, July 2025; 7. Worldwide Tax Summaries, PWC, March 2026 8. Greater Jakarta Industrial Market Outlook Q1 2026, CBRE Research; 9. HGB stands for Hak Guna Bangunan (Indonesian for "Right to Build") 10. HM stands for Hak Milik (Indonesian for "Right to Own") 11. PT PMA (Perseroan Terbatas Penanaman Modal Asing) is Indonesia's standard foreign-owned limited liability company structure. Under the country's Positive Investment List, it allows up to 100% foreign equity or requires a local joint-venture partner depending on the sector.

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Automotive Exports Gain Momentum as Global Market Access Widens

Building on its large domestic manufacturing and sales base, India's automotive exports continue to strengthen, with total export value reaching a record ~USD 26 billion in FY2026, up 14.7% year-on-year (Y-o-Y). Production-linked incentives, a wider network of free trade agreements (FTAs), and rising overseas demand for electric and smart-mobility solutions have also contributed to this momentum.

Export Momentum

- The automotive sector's share of India's overall exports has traced a consistent upward trajectory, from 4.7% in FY2022 to about 5.9% in FY2026.
- Exports of passenger vehicles reached 9.05 lakh units in FY2026, up 17.5% Y-o-Y, while two-wheeler exports rose 23.4% to about 51.8 lakh units.
- Q1 FY27 EV exports reached ~10,800 units, a more than **7-fold** increase over the previous year.

Key Export Corridors

Established Demand Markets

- APAC: Largest export destination with established regional trade integration
- Americas: Strong demand for passenger vehicles and components
- Africa: Growing demand for affordable mobility solutions

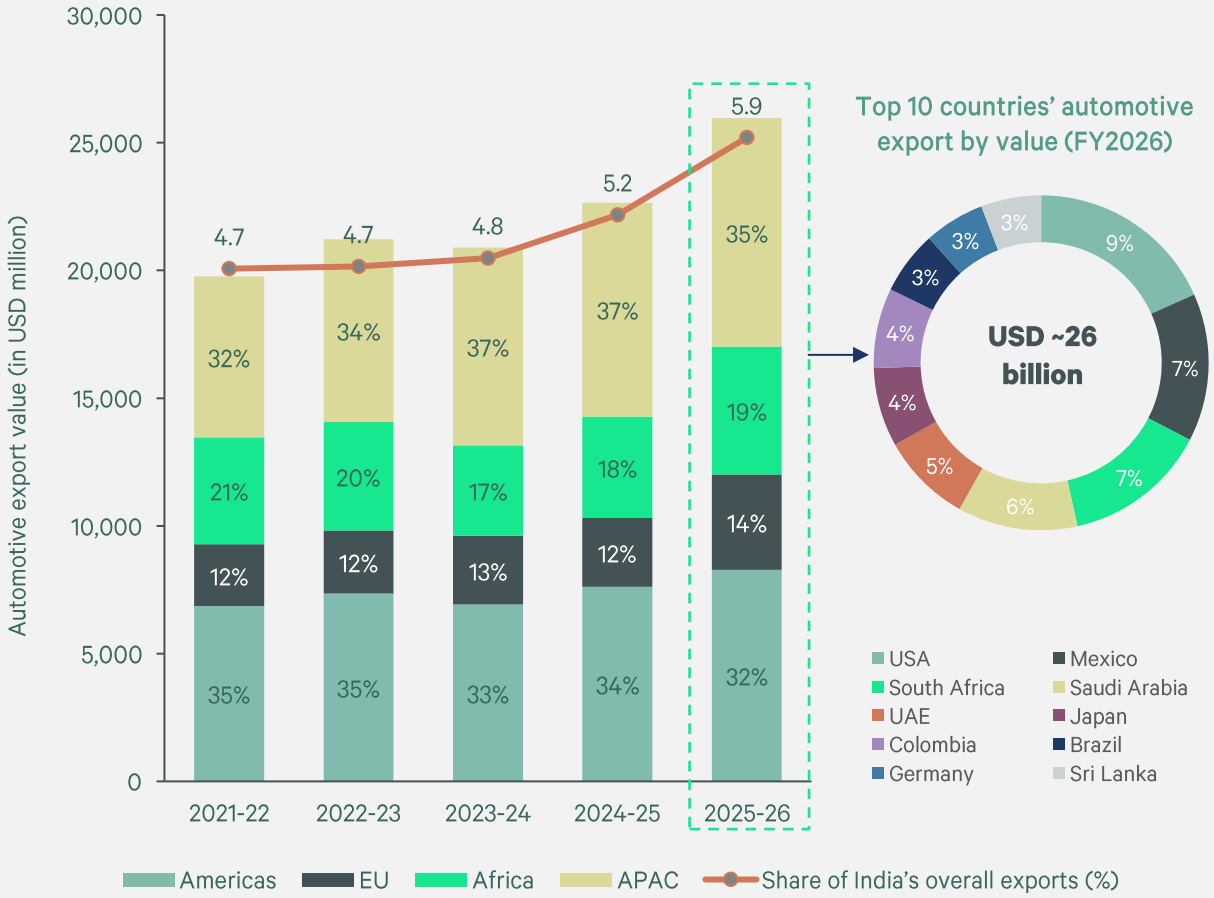
Both these regions together accounted for **over two-thirds of** automotive export value over the past five years

Emerging Opportunities

- Middle East: Wider market access through the UAE CEPA and Oman CEPA
- UK & Europe: Improved access through UK CETA and engagement with EFTA
- Latin America: Growing acceptance of India-manufactured vehicle platforms

Domestic demand remains the foundation of India's automotive industry, while improving export competitiveness and expanding FTAs are broadening opportunities across vehicles, components and emerging mobility technologies.

Figure 1.1: India's automotive export value by destination region (FY2021 to FY2026)



Source: Department of Commerce, Ministry of Commerce and Industry, August 2026; CBRE Research, H1 2026

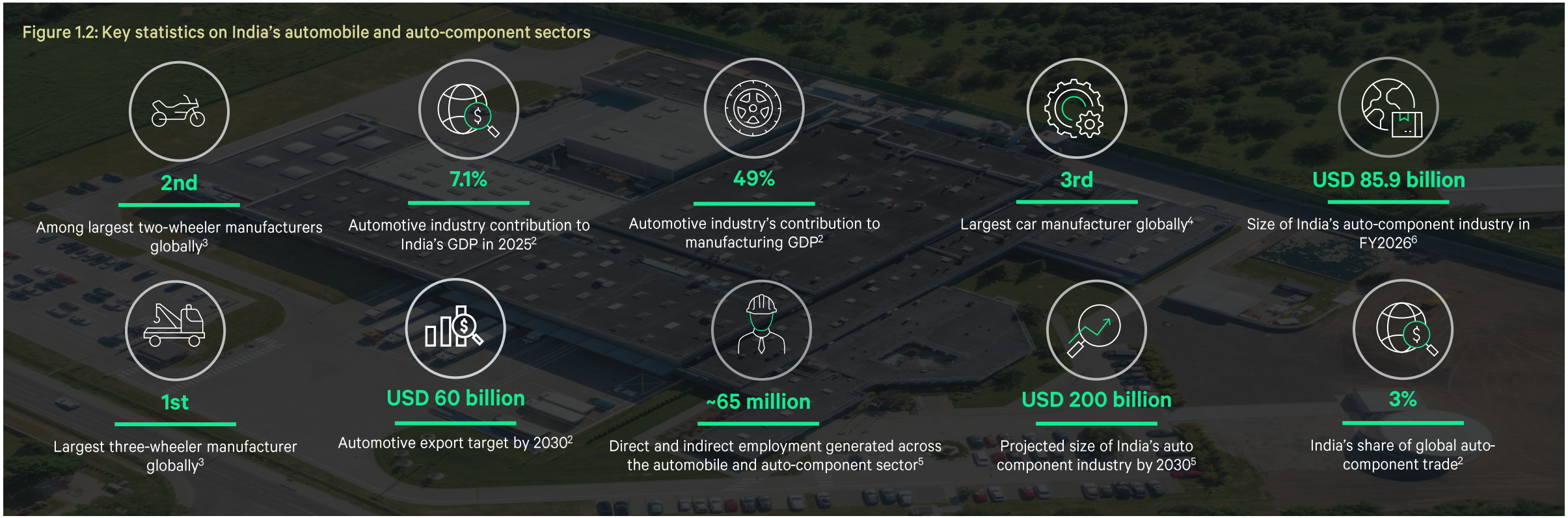
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A Cornerstone of India's Manufacturing and Export Growth

India's automobile sector has developed into one of the world's largest manufacturing ecosystems, ranking fourth globally in vehicle output, with production reaching 35 million units in FY2026[1]. Concurrently, vehicle sales touched nearly 28 million units in FY2026[1], further demonstrating the scale of the domestic market. The broader automotive sector contributes approximately 7.1%[2] to India's GDP and ~49%[2] to manufacturing GDP, underscoring its significance within the country's industrial economy.

Driven by electrification, supply-chain diversification, and schemes like PLI and PM E-DRIVE*, India's automotive sector is accelerating its advanced automotive technologies (AAT) and the expansion of electric vehicle (EV) infrastructure across Global Value Chains.

Figure 1.2: Key statistics on India's automobile and auto-component sectors



Source: 1. Automobile Industry Report, IBEF, May 2026; 2. Automotive Industry: Powering India's Participation in Global Value Chains (GVCs), NITI Aayog, April 2025 3. Revolutionizing Mobility, Ministry of Commerce & Industry, March 2025; 4. Ministry of Road Transport & Highways, PIB, September 2025 5. Auto Components Industry in India, IBEF, May 2026; 6. ACMA, July 2026

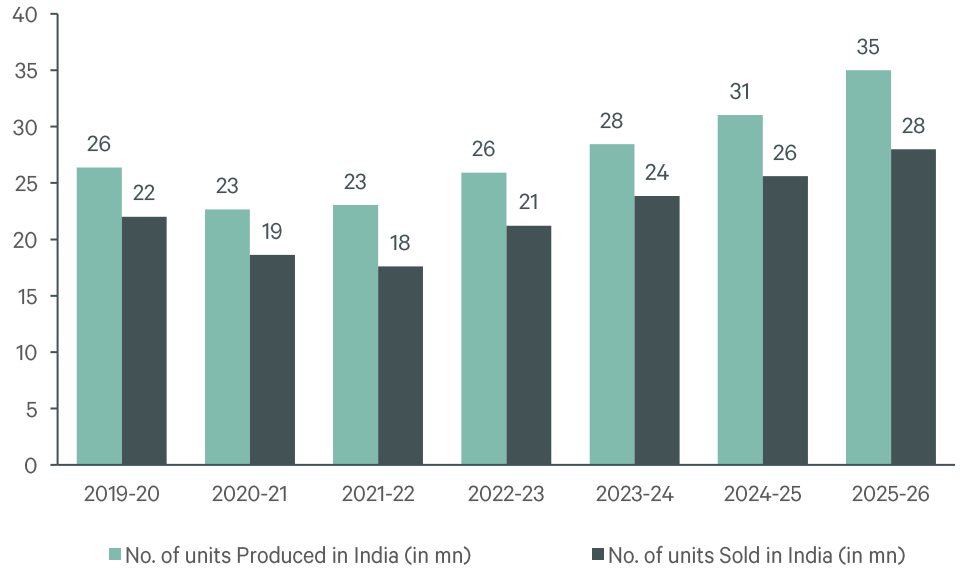
Note: The term "Automotive" refers broadly to motor vehicles and the wider industry encompassing their design, development, manufacturing, marketing, and maintenance. "Automobile" refers more specifically to a self-propelled road vehicle used to transport people or goods and, in common usage, often denotes passenger cars. | *PM E-DRIVE - Prime Minister's Electric Drive Revolution in Innovative Vehicle Enhancement

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Maharashtra, Uttar Pradesh Lead Domestic Automobile Sales

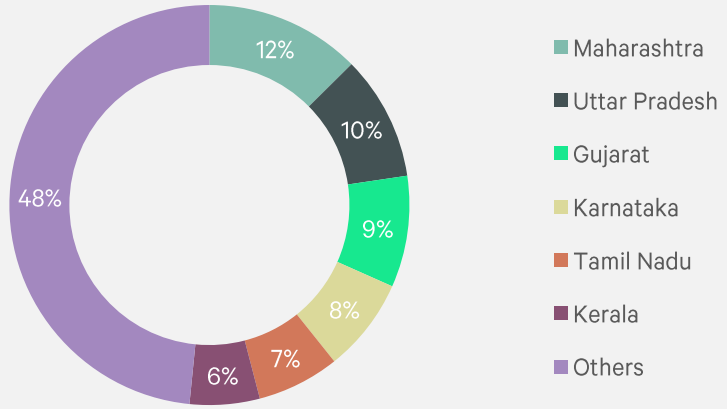
In addition to the improvement in the manufacturing and exports scenario, domestic demand remained firm, evidenced by the strong sales recorded in the previous fiscal year. Maharashtra and Uttar Pradesh accounted for the largest shares of state-level registrations, while the top six states together represented 52% of the national total**.

Figure 1.3: Indian automobile production and sales (FY2020-FY2026)

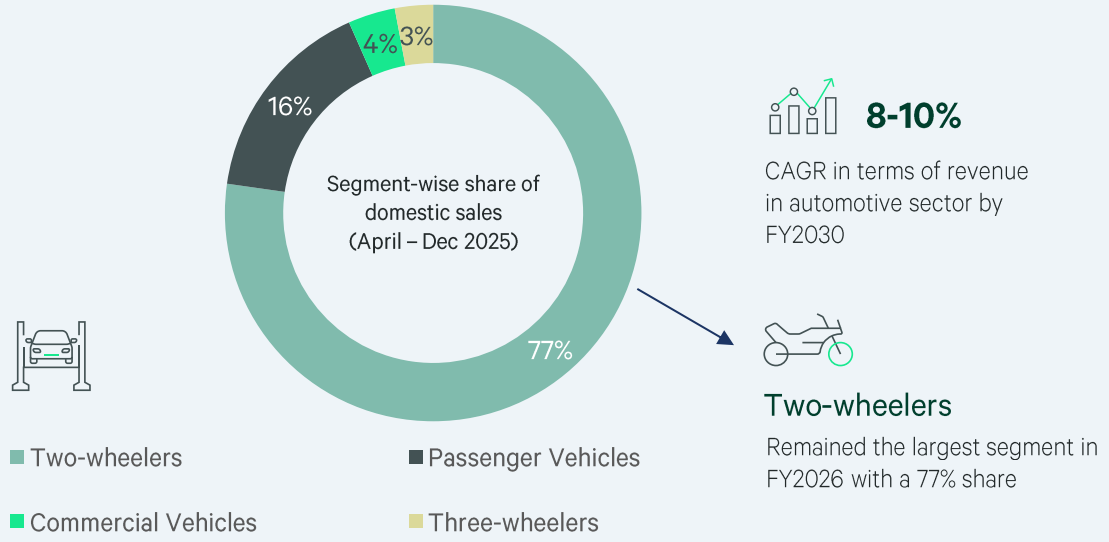


Source: Automobile Industry Report, IBEF, May 2026

Figure 1.4: State-wise share of automobile registrations (2021-H1 2026)



Source: VAHAN Portal, Ministry of Road Transport & Highways, July 2026



Source: Automobile Industry Report, IBEF, May 2026

1. Automobile Industry Report, IBEF, May 2026; CBRE Research, H1 2026 | ** National automobile sales are based on SIAM-reported domestic sales, while state-wise shares are based on VAHAN vehicle registrations.

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India's EV Opportunity Extends Across the Value Chain

Electric mobility is becoming an increasingly important part of India's automobile market, with annual EV sales around ~2.5 million units[1] in FY2026. The segment is gaining scale as automakers expand their EV portfolios, the public charging network grows, and efforts to manufacture batteries and key components locally gather pace. EV adoption is also being supported by lower running costs relative to ICE vehicles and rising fuel prices, with electric passenger vehicle sales increasing by ~64% Y-o-Y during January to March 2026[2]. Meanwhile, EV penetration in the passenger vehicle segment increased to ~6.5% in Q1 FY2027 from ~4.6% during the same period in FY2026[3].

Figure 1.5: India's EV sector: Key indicators

~52X

USD ~3.7 bn

Size of India's EV market in 2025[4]

USD ~191 bn

Projected size of India's EV market by 2034[4]

USD ~700 mn

India's Passenger EV Exports (Jan-Jun 2026)[5]

Figure 1.6: Drivers of EV adoption and localisation in India

Large-scale expansion plans by OEMs

Tata Motors, Mahindra, Maruti Suzuki, Hyundai, JSW MG Motor, Ola Electric, and Ather, among others, are expanding their EV portfolios

Growth in EV Infrastructure

As of July 2026, 52,718 public EV charging stations set up across India[6]

100% FDI permitted

Facilitating greater participation and innovation[7]

Production scalability

Major EV players have scaled average monthly production capacity by 15–20%, with select manufacturers expanding up to 30% in 2026[8]

Lower total cost of ownership (TCO)

Home-charged EVs cost approximately INR 1–2 / km,[9] compared to INR 4–10 / km[9] for ICE vehicles*

Climate considerations

India commits to reduce emissions Intensity of its GDP by 47% by 2035 from 2005 level[10]

Localisation of EV battery chain

The PLI-ACC scheme and investments in gigafactories are encouraging domestic battery manufacturing and reducing import dependence[11]

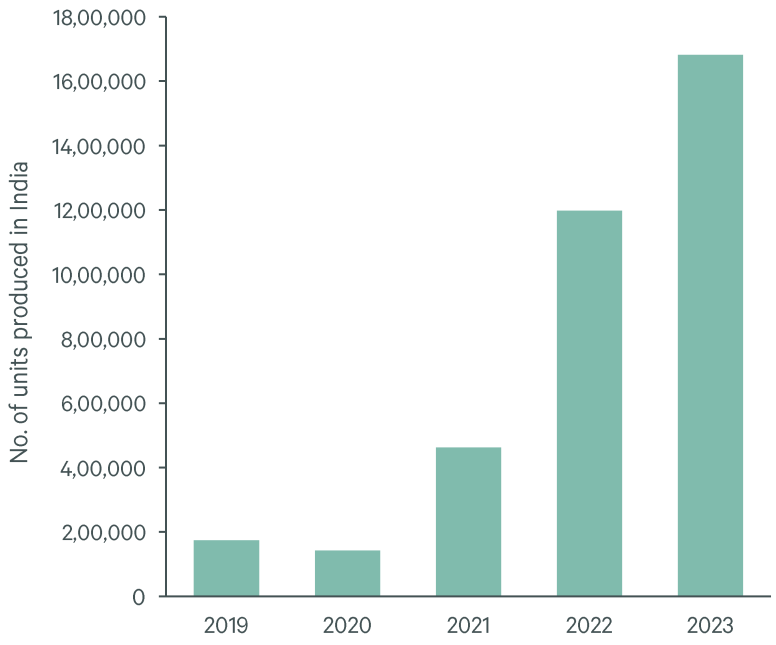
Source: 1. Automobile Industry Report, IBEF, May 2026 2. Vahan dashboard, July, 2026; 3. Indian Automobile Industry – Passenger Vehicles, ICRA, July 2026; 4. The Rise of India's Electric Vehicles Ecosystem, PIB, August 2026; 5. Ministry of Commerce & Industry, August 2026; 6. Charging Stations for Electric Vehicles, Ministry of Heavy Industries, July 2026; 7. Revolutionizing Mobility, Ministry of Commerce & Industry, March 2025; 8. Publicly available information, August 2026; 9 NITI Aayog e-AMRIT Home Charging Calculator, August 2026; 10. The Union Cabinet, PIB, March 2026; 11. Ministry of Heavy Industries, February 2026 | Note: FAME = Faster Adoption and Manufacturing of Electric Vehicles; PLI-ACC represents Advanced Chemistry Cells | *The above calculation for ICE vehicles includes only petrol & diesel, CNG is excluded.

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EV Adoption Broadens Across States and Segments

Domestic EV sales reached around ~2.5 million[1] units in FY2026, reflecting a 24% Y-o-Y increase. Uttar Pradesh and Maharashtra accounted for the largest proportions of state-level EV sales. Electric two-wheelers remained the dominant category, comprising about 56% of registrations. These trends collectively demonstrate growing consumer acceptance and sustained market growth of EVs in the country.

Figure 1.7 : EV Production in India (2019-2023)



~ 78%

CAGR in India's EV registrations (FY2021-FY2026*)[2]

USD 1.4 bn

Investments in EV sector in FY25[2]

54%

Projected CAGR in terms of value for India's EV market (2025-2034)[2]

~46x

Growth in EV sales since 2016[2]

Source: 1. Automobile Industry Report, IBEF, May 2026 2. Roads Reimagined: The Rise of India's Electric Vehicles Ecosystem, PIB, August 2026 | Note: * as of July 2026

Figure 1.8: Vehicle category-wise share of registered EVs (2018-March 2026)

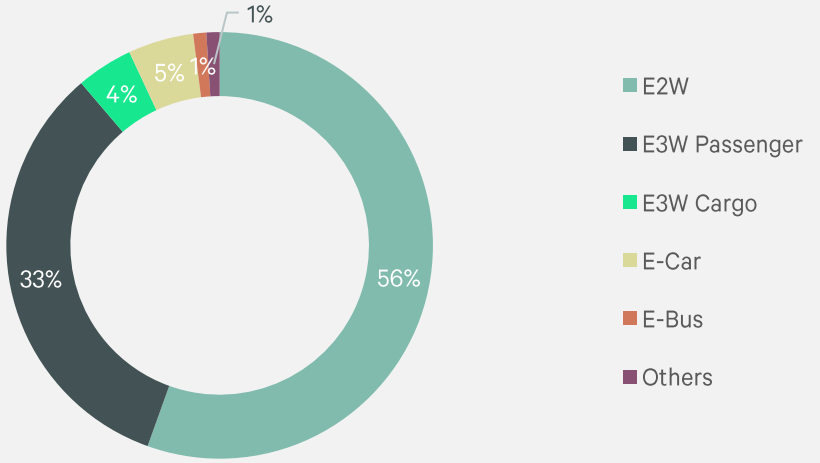
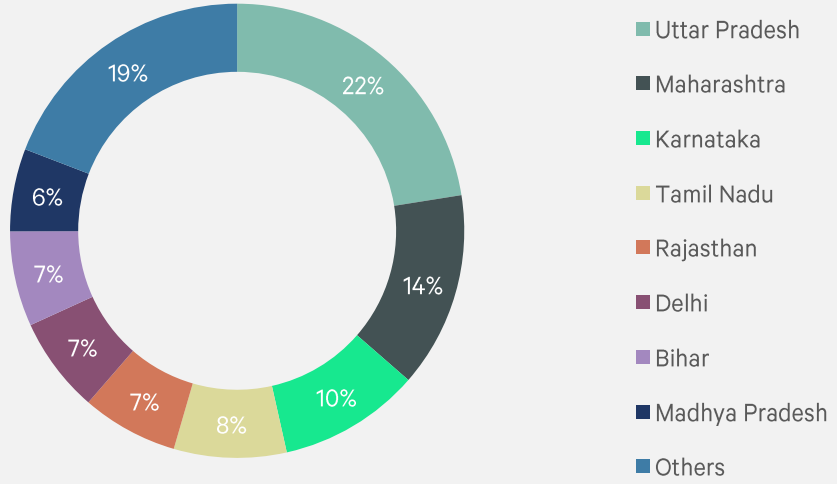


Figure 1.9: State-wise share of EV sales (2018-March 2026)



Others include Gujarat, Telangana, Kerala, and Assam

Source: India EV Market Annual Report, JMK Research & Analytics, March 2026

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From EV Assembly to an Integrated Manufacturing Ecosystem

While India has developed a mature and highly localised ICE manufacturing ecosystem, EV manufacturing is moving towards a more integrated ecosystem. The next phase of growth lies in building the capabilities in battery cells, semiconductor components, and critical minerals. To accelerate this transition, the Government of India has introduced targeted initiatives focused on battery manufacturing, semiconductor production, and critical mineral security, laying the foundation for a more integrated and self-reliant EV manufacturing ecosystem.

Figure 1.10: Comparison of India's ICE and EV manufacturing ecosystems

ICE Vehicle Ecosystem

USD 85.9 billion[1] Indian auto component industry's turnover during FY2026

Sales to domestic OEMs Increased by **10.5%** to touch USD ~ 75 billion[1] in FY2026



Strong domestic manufacturing capabilities

- Engine Components
- Body / Chassis
- Suspension & Braking
- Drive Transmission & Steering
- Electricals & Electronics
- Interiors (non-electronic)

EV Vehicle Ecosystem

~30-40% EV value chain localised[2]

~90% Power semiconductors imported[4]

~75% Battery cells imported[3]



Enabling the next phase of EV localization through strategic govt programs

Low Import Dependency

Vehicle assembly, chassis, wiring, and mechanical housings

Moderate Import Dependency

Motors, controllers, inverters, and chargers

High Import Dependency

Battery cells, magnets, and critical minerals

India Semiconductor Mission

INR 1.27 lakh crore[5]

Building semiconductor & electronic capabilities for EV power train & vehicle electronics

ACC Battery PLI Scheme

INR 18,000 crore[6]

Supporting domestic battery cell manufacturing & ecosystem

National Critical Mineral Mission

INR 34,300 crore[7]

Securing critical minerals for batteries, motors, and advanced materials

Source: 1. ACMA, July 2026 2. Nomura Research Institute (NRI), India's Electric Vehicle Supply Chain Landscape (2024); 3. OMI Foundation, Powering the Future: Why India Must Localise EV Battery Production (2025); 4. Ministry of Heavy Industries; 5.India Semiconductor Mission (ISM), Ministry of Electronics & Information Technology; 6. National Programme on Advanced Chemistry Cell (ACC) Battery Storage; 7. Ministry of Mines, National Critical Mineral Mission; CBRE Research, H1 2026. Note: AI-generated image, used for illustrative purposes only

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The Automobile Value Chain: Real Estate Depth at Each Stage

Figure 1.11: Key real estate components across an automobile's lifecycle

Upstream (Suppliers & Materials)

Industrial plants: Heavy engineering, foundries, forging tools, and casting production lines

Inbound warehousing[1]: Bulk storage yards just-in-time (JIT) component warehouses

Midstream (Manufacturing & Transit)

Gigafactories: Advanced / smart manufacturing facilities with robust infrastructure, and high floor-load capacity

Inbound & outbound warehousing[2]: Finished-vehicle yards, JIT component warehouses, temperature-controlled battery and cell storage, and distribution centres for transit to showrooms

R&D facilities: Technical design laboratories, testing centres / tracks, etc.

Downstream (Sales & Fleet Mobility)

Offices: Regional and zonal sales and marketing, financing, insurance, and customer service

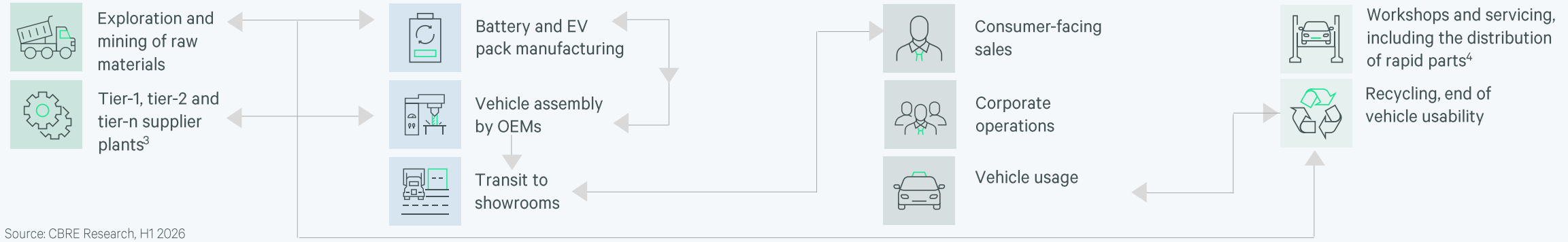
Retail showrooms: High-visibility store fronts and customer experience centres

Parking facilities: Residential and commercial parking, and fleet-holding areas

Aftermarket (Circular Loop & Repair)

Recycling factories: Facilities handling end-of-life vehicles, batteries and component recovery

Micro-fulfilment centres: Urban logistics hubs supporting rapid spare-parts distribution



Source: CBRE Research, H1 2026

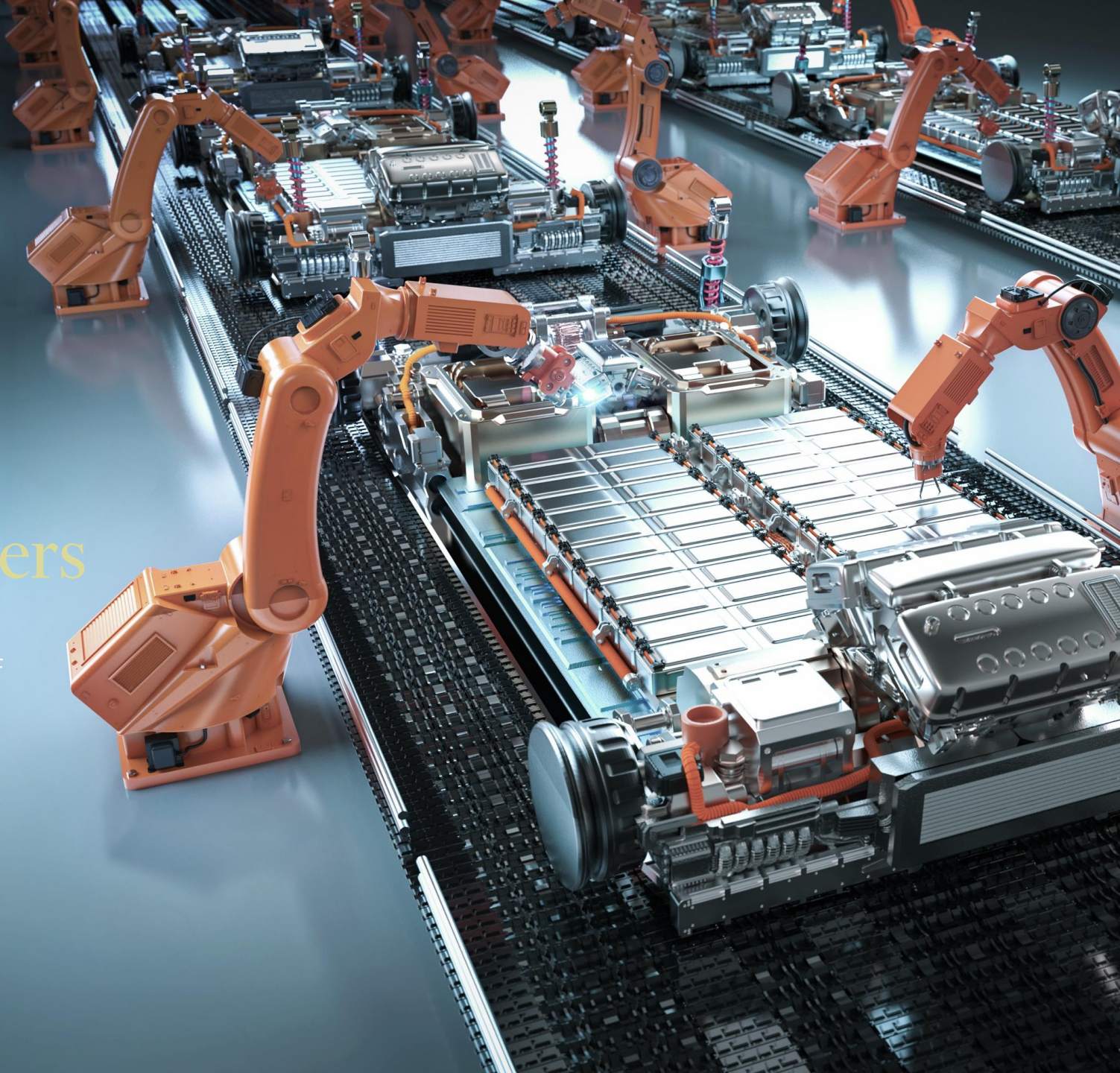
1. Inbound warehousing refers to the storage and handling of materials and components received at a facility before they are used in production or moved further along the supply chain. 2. Outbound warehousing refers to the storage, handling and distribution of finished goods after production, prior to delivery to dealers, distributors, showrooms or end customers. 3. Tier-1, tier-2 and tier-n describe a manufacturer's position within a layered supply chain hierarchy. These distinctions are widely used in automotive, aerospace, and electronics production to define how close a factory or vendor is to the final product assembly. For instance, if a Tier-1 plant builds a full seat assembly, a Tier-2 plant might supply the electric motors for the seat adjustment; 4. Rapid parts distribution refers to a sophisticated logistics network designed to deliver automotive components to repair centres and workshops with extreme speed to minimize vehicle downtime.

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02

India’s Automotive Manufacturing Clusters

Each market offers a different combination of manufacturing depth, connectivity, real estate and expansion potential.



State-wise Strategic Evaluation Matrix

The assessment benchmarks major automotive manufacturing states in India using five readiness parameters that are expected to influence investment attractiveness and long-term manufacturing competitiveness. These dimensions evaluate each state's capacity to attract, support, and expand automotive and electric vehicle manufacturing operations.

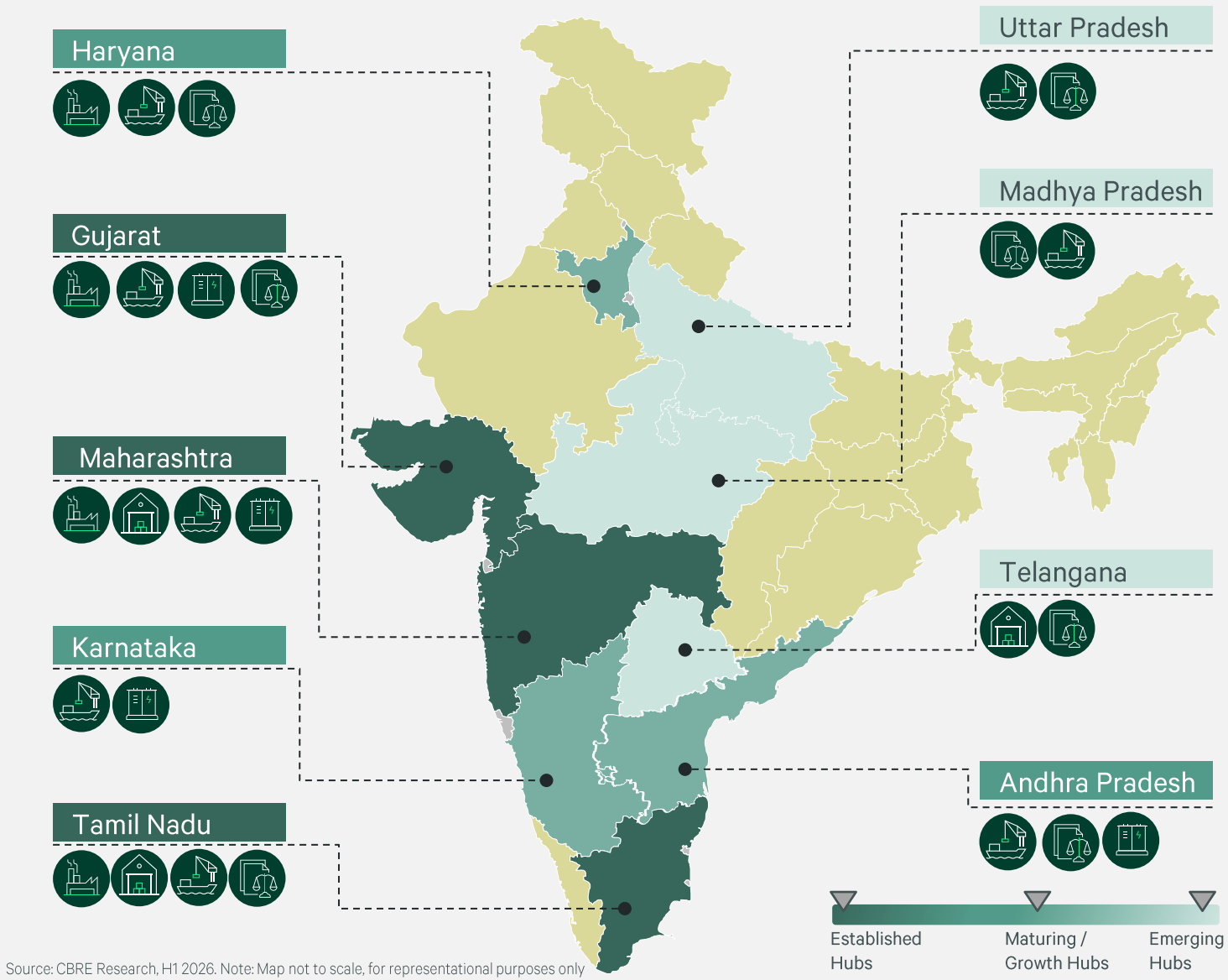
Assessment Parameters

- **Automotive Ecosystem:** Depth of OEM presence, supplier networks, manufacturing footprint, and workforce availability
- **Industrial Real Estate:** Total industrial land, expansion potential, and industrial & logistics park ecosystem
- **Infrastructure Readiness:** Air, road, rail and port infrastructure capacity, connectivity, and efficiency
- **Utilities:** Availability, reliability, and cost competitiveness of power, water
- **Business Environment:** Business approvals, utility access, land allotment and environmental clearances

Key findings

Maharashtra, Gujarat, and Tamil Nadu emerge as India's most established automotive hubs, characterised by mature automotive ecosystems, industrial real estate & infrastructure. Andhra Pradesh, Telangana, and Karnataka are evolving as growth markets, leveraging industrial corridors, improving infrastructure, and competitive operating environments to strengthen their manufacturing proposition. Haryana continues to play a strategic position as a concentrated automotive cluster serving the National Capital Region (NCR).

Figure 2.1: Automotive cluster assessment: Benchmarking states by automotive readiness

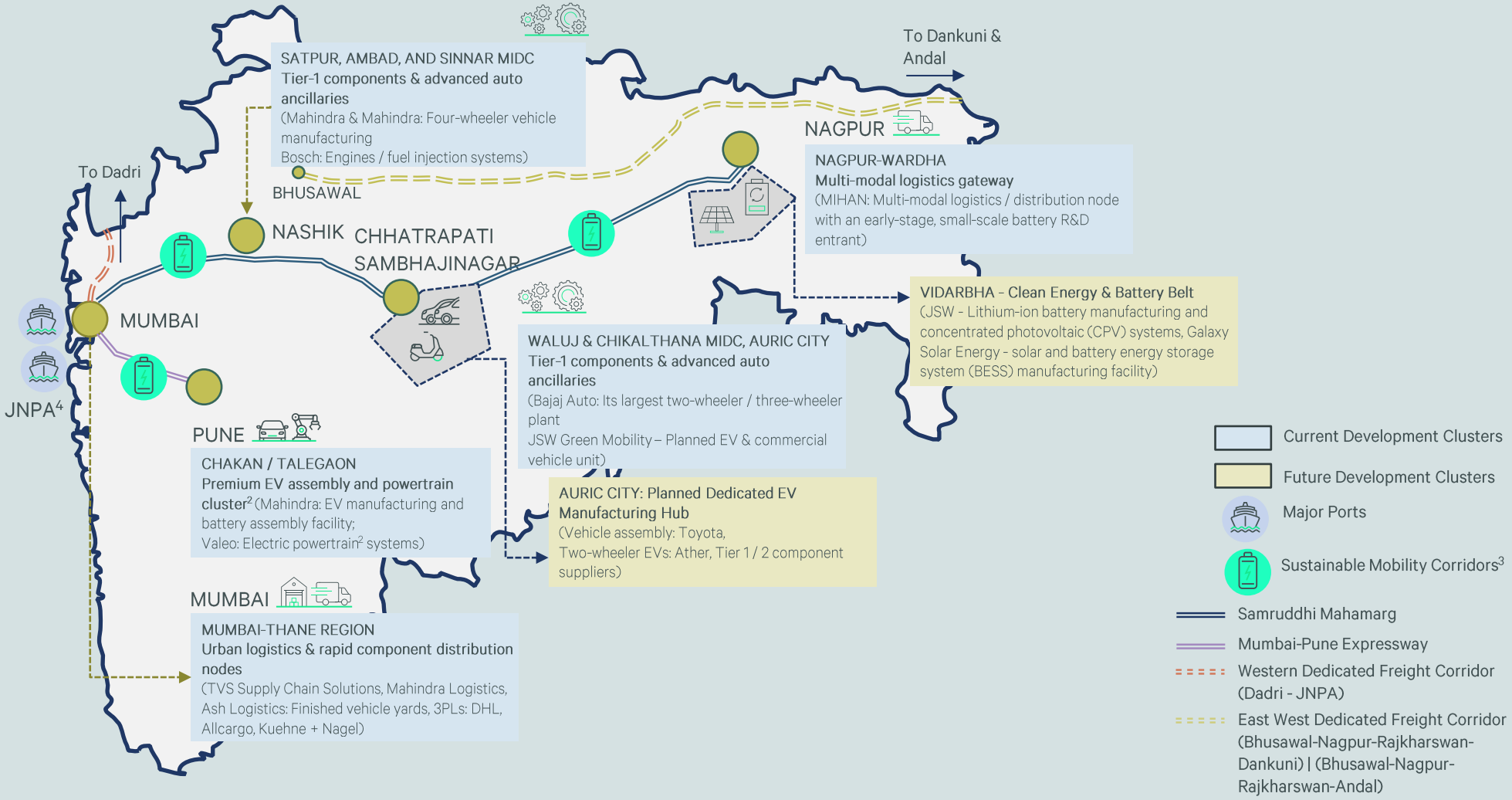


Source: CBRE Research, H1 2026. Note: Map not to scale, for representational purposes only

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Maharashtra: Premier Automotive & EV Manufacturing Centre

Transforming from an ICE-era* manufacturing base, Maharashtra's automotive manufacturing sector is now expanding into EVs and associated technologies. In FY2024, the state's auto parts and accessories manufacturing sector generated ~USD 2.9 billion (INR 27,420 crore) in GVA, representing 24.4% of the national total[1]. The Chakan-Talegaon industrial corridor in Pune serves as the core of this ecosystem, hosting over 6,850 component manufacturers and 23 OEMs[1].



Source: 1. Annual Survey of Industries 2023-24, Ministry of Statistics & Programme Implementation, Government of India, September 2025; 2 A powertrain hub typically refers to a centralised manufacturing facility, engineering cluster, or software platform dedicated to the development and production of vehicle propulsion systems; 3. Maharashtra's EV Policy 2025–2030 designates these corridors as sustainable mobility corridors for dense, renewably-powered EV charging every 25 km, toll-free EV travel, and (for Samruddhi Mahamarg) low-impact construction practices; 4. JNPA – Jawaharlal Nehru Port Authority | *An ICE (Internal Combustion Engine) era manufacturing base refers to a massive legacy network of factories and supply chains built to produce complex mechanical components of vehicles such as engines and transmissions. Note: Map not to scale, for representational purposes only

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Maharashtra

Premier automotive & EV manufacturing centre

Utilities

Power: Power-surplus state, with **84 GW** capacity[1]
Water: **10%** of water allocation reserved for industrial use[2]



OEM Ecosystem

25+ OEMs; about 90% concentrated in Pune[3]

Ancillary Ecosystem

10,000+ auto component manufacturers[4]

Workforce

250,000+ workers

Infrastructure Readiness

JNPA Port
India's largest container port

Highways
Multiple expressways & highways supporting inter and intra-state travel

DFC
Western Dedicated Freight Corridor

Airports
Multiple international & domestic airports

Industrial Real Estate[5]

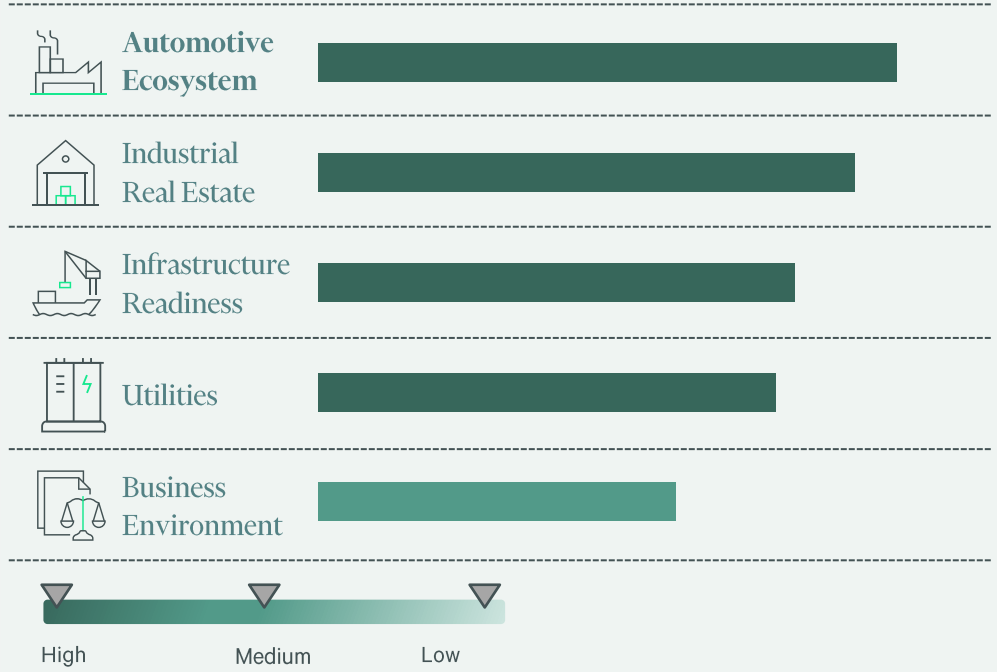
510+ number of industrial parks

95%+ Mixed-use industrial parks

80,000+ ha. of industrial land

19,500+ ha. of land available

Automobile Manufacturing Readiness Matrix



Charting the Roadmap to Growth[6]

INR 1,993 crore
Allocated under EV policy for manufacturing & development

7%
Automobile sector leads state manufacturing, driving GSDP growth

Every 25 km
With mandated fast-charging infrastructure along state & NH

INR 15,000 crore+
Mahindra invests in Nagpur's largest manufacturing hub

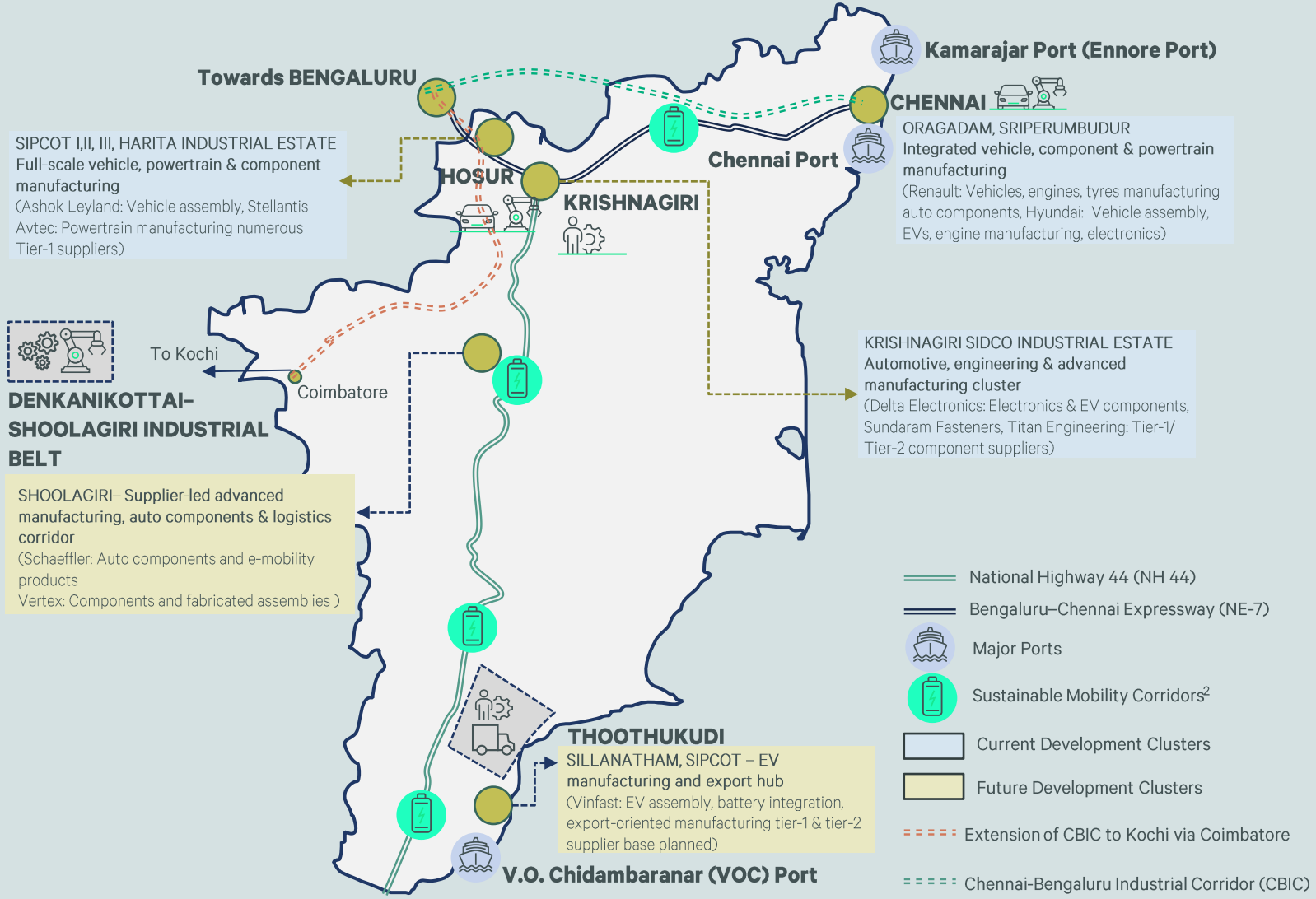
4,000+
units fuel Pune as the largest automotive manufacturing hub

Source: 1. Bombay Chamber Energy Leadership Conclave 2026; 2.. Govt. of Maharashtra 2018 3.. Navigating the Shift: A just transition roadmap for Maharashtra's automobile sector, iForest, April 2024; 4. MAITRI, Auto and Auto Component, August 2026 5. India Industrial Land Bank, July 2026; 6. Publicly available information
Note: AI-generated image, used for illustrative purposes only

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Tamil Nadu: India’s Manufacturing & Localised Supplier Base

Tamil Nadu has emerged as India's leading EV manufacturing and export hub, supported by advanced infrastructure, including three major ports and extensive trade routes, a robust OEM and supplier ecosystem, progressive government policies, and strong R&D capabilities. The automobile sector in Tamil Nadu contributes 12% to the state's manufacturing GDP and accounts for 35% of India’s auto component production.[1] The state's EV policy has accelerated investments in battery manufacturing, sustainable mobility corridors, and industrial parks. Additionally, emerging clusters such as Thoothukudi are enhancing localisation, EV assembly, and export-oriented manufacturing, thereby reinforcing Tamil Nadu's leadership in electric mobility.



Source: 1. Tamil Nadu’s Automotive Future, State Planning Commission, 2025 2. Tamil Nadu's EV Policy 2023 designates these corridors as sustainable mobility corridors for dense, renewably-powered EV charging every 25 km, toll-free EV travel, and low-impact construction practices.
Note: Map not to scale, for representational purposes only

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Tamil Nadu

Manufacturing & localised supplier base



Utilities

Power: Reliable power with **24x7** dedicated industrial feeders, and **open-access rights for units above 63 kVA**[1]
Water: **850+** MLD desalination capacity[2]

OEM Ecosystem

18+ OEMs[3]

Ancillary Ecosystem

400+ component manufacturers[3]

Workforce

110,000+ workers[3]

Infrastructure Readiness

Key Ports
Chennai, Thoothukudi & Ennore

Highways
Major National Highways, Chennai-Bengaluru & Vizag-Chennai Industrial Corridors

Land
Large industrial parks with plug-and-play infrastructure

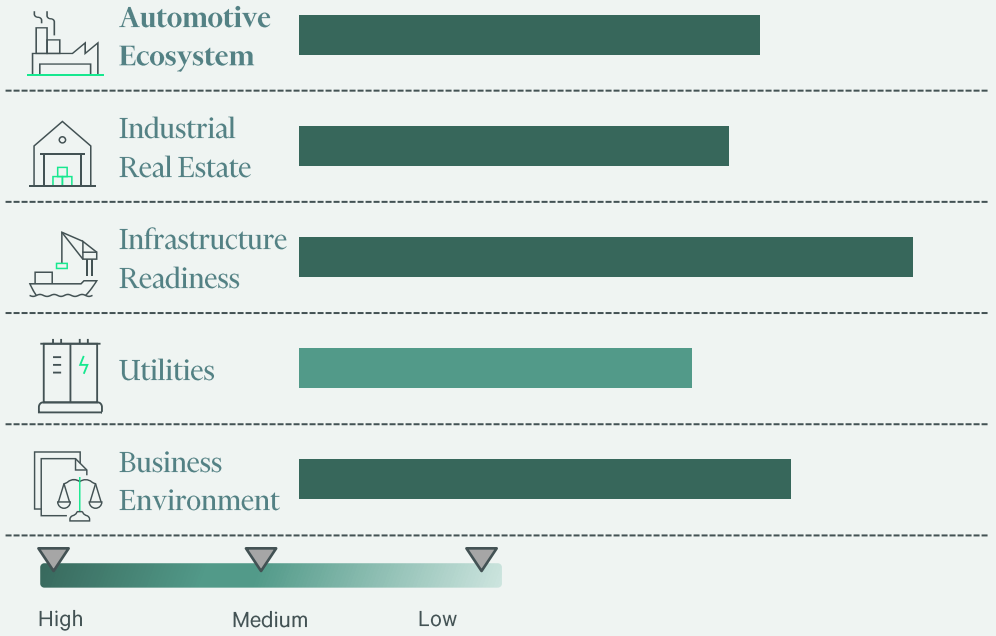
Airports
Multiple international & domestic airports

Industrial Real Estate[4]

340+ number of industrial parks	**90%+** Mixed-use industrial parks
30,000+ ha. of industrial land	**16,000+** ha. of land available

Source: 1. New TNERC Green Energy Open Access Regulations 2025; 2. Tamil Nadu semiconductor and advanced electronics policy 2024; 3. Tamil Nadu's Automotive Future, State Planning Commission, 2025; 4. Tamil Nadu industrial policy 2021; 5. India Industrial Land Bank, July 2026 6. Publicly available information. Note: AI-generated image, used for illustrative purposes only.

Automobile Manufacturing Readiness Matrix



Charting the Roadmap to Growth[5]

INR 50,000 crore
Investments in EV manufacturing & development

25%
Contribution of the state in India's tyre exports

40%
of India's total EV output comes from Tamil Nadu

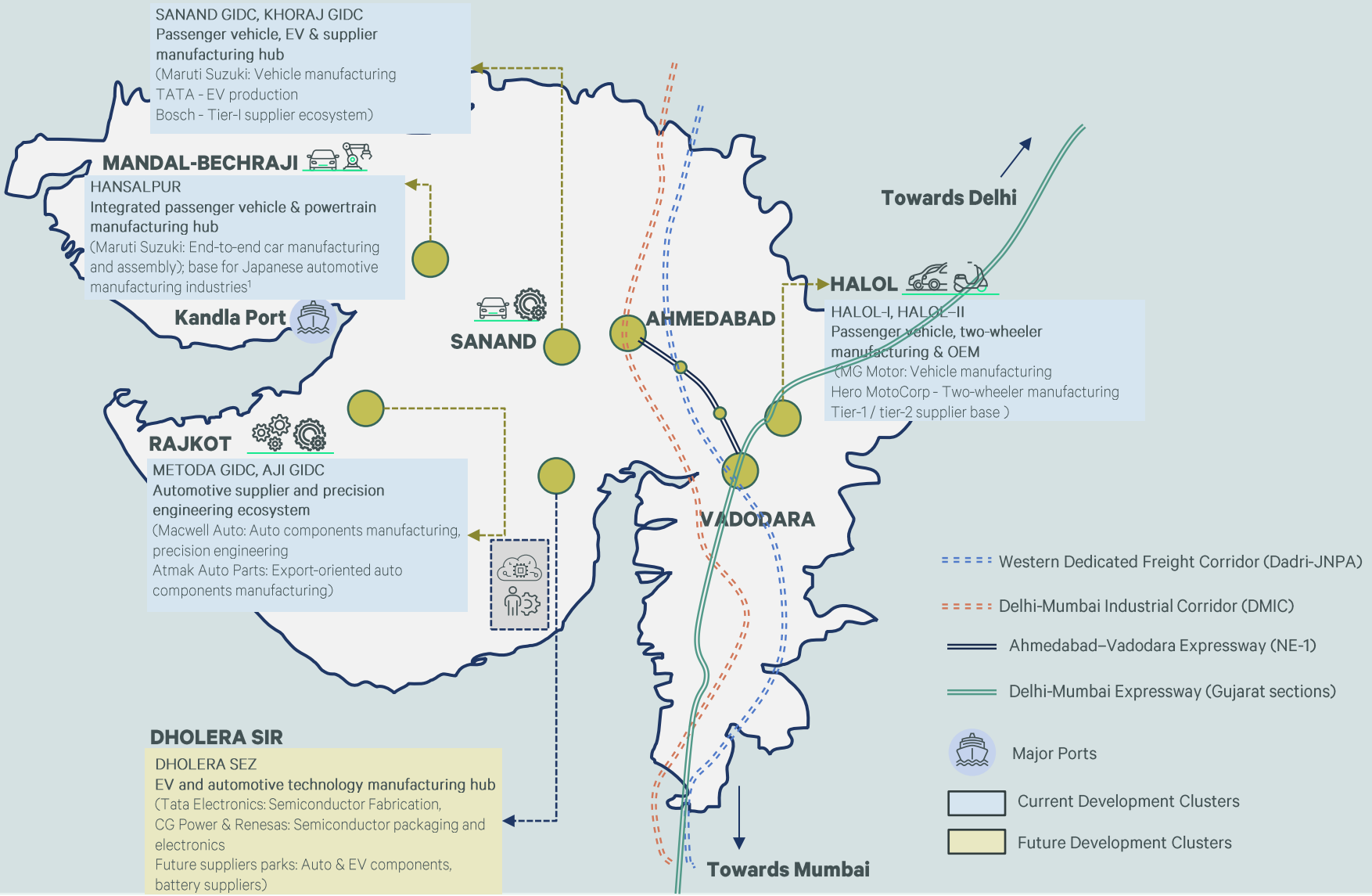
INR 9,000 crore
invested by Tata Motors in new manufacturing plant – 2026

3,000+
manufacturing units in SIPCOT, including automotive and EVs

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Gujarat: Integrated Automotive Manufacturing Base

Gujarat has evolved into one of India's leading hubs for automobile and auto-component manufacturing, supported by a strong industrial base, integrated manufacturing clusters, and advanced multimodal logistics infrastructure. The state's automotive ecosystem encompasses major clusters such as Sanand, Mandal-Bechraji SIR, Halol, Rajkot, and the emerging Dholera SIR. These clusters collectively facilitate the production of passenger vehicles, commercial vehicles, EVs, powertrains, precision engineering components, and maintain a comprehensive tier-1 and tier-2 supplier network. Government initiatives, including the PLI Scheme for Automobile and Auto Components, further reinforce Gujarat's manufacturing ecosystem.



Source: 1. Gujarat Industrial Policy, 2026
Note: Map not to scale, for representational purposes only

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Gujarat

Integrated automotive manufacturing base

Utilities

Power: The state leads India's renewable capacity at ~50.38 GW[1]
Water: 50% assistance (up to INR 75 crore) for wastewater recycling across 239+ GIDC estates, including Dholera SIR[1]



OEM Ecosystem

6 core OEMs with 50+ large-scale tier-I component OEMs[2]

Ancillary Ecosystem

450+ auto component manufacturers along with 2,500+ specialised MSME auto-engineering units[2]

Workforce

Number of Workers: 110,000+

Infrastructure Readiness

Key Ports
40+ ports including Kandla and Mundra

Highways
Major National Highways, NH-48 connectivity, Delhi-Mumbai Industrial Corridor

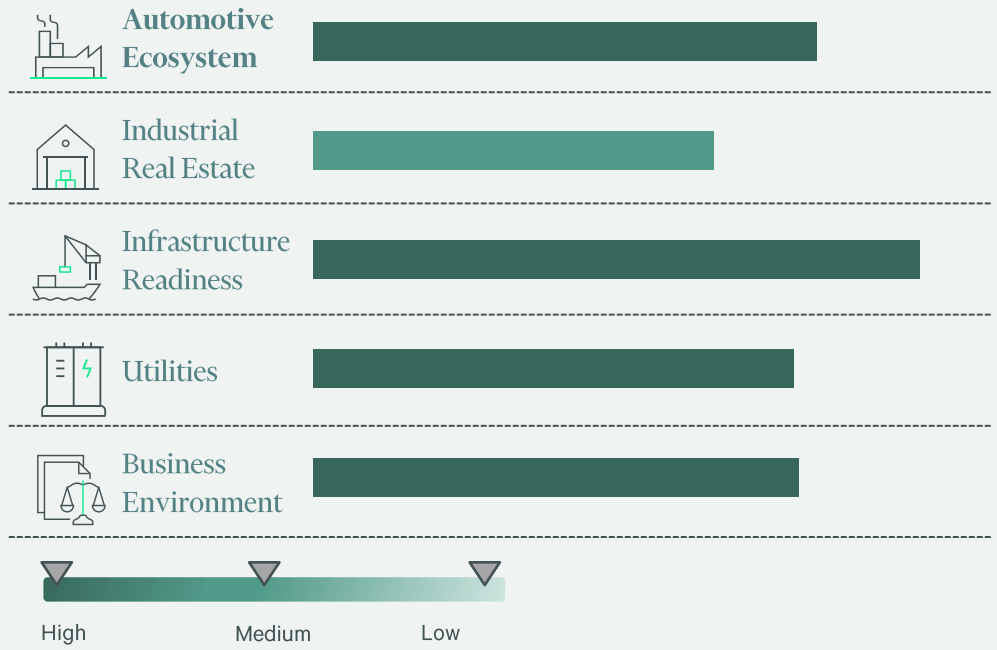
DFC
Western Dedicated Freight Corridor

Logistics
India's longest coastline connectivity for exports

Industrial Real Estate[3]

280+ number of industrial parks	95%+ Mixed-use industrial parks
190,000+ ha. of industrial land	12,500+ ha. of land available

Automobile Manufacturing Readiness Matrix



Charting the Roadmap to Growth[4]

INR 870 crore
Invested under EV policy to promote EV sales[2]

4%
Share of automobile sector in state's total GSDP

12-15%
Contribution to India's passenger vehicle production

INR 35,000 crore
To be invested by Maruti Suzuki in setting up new manufacturing plant by 2029[3]

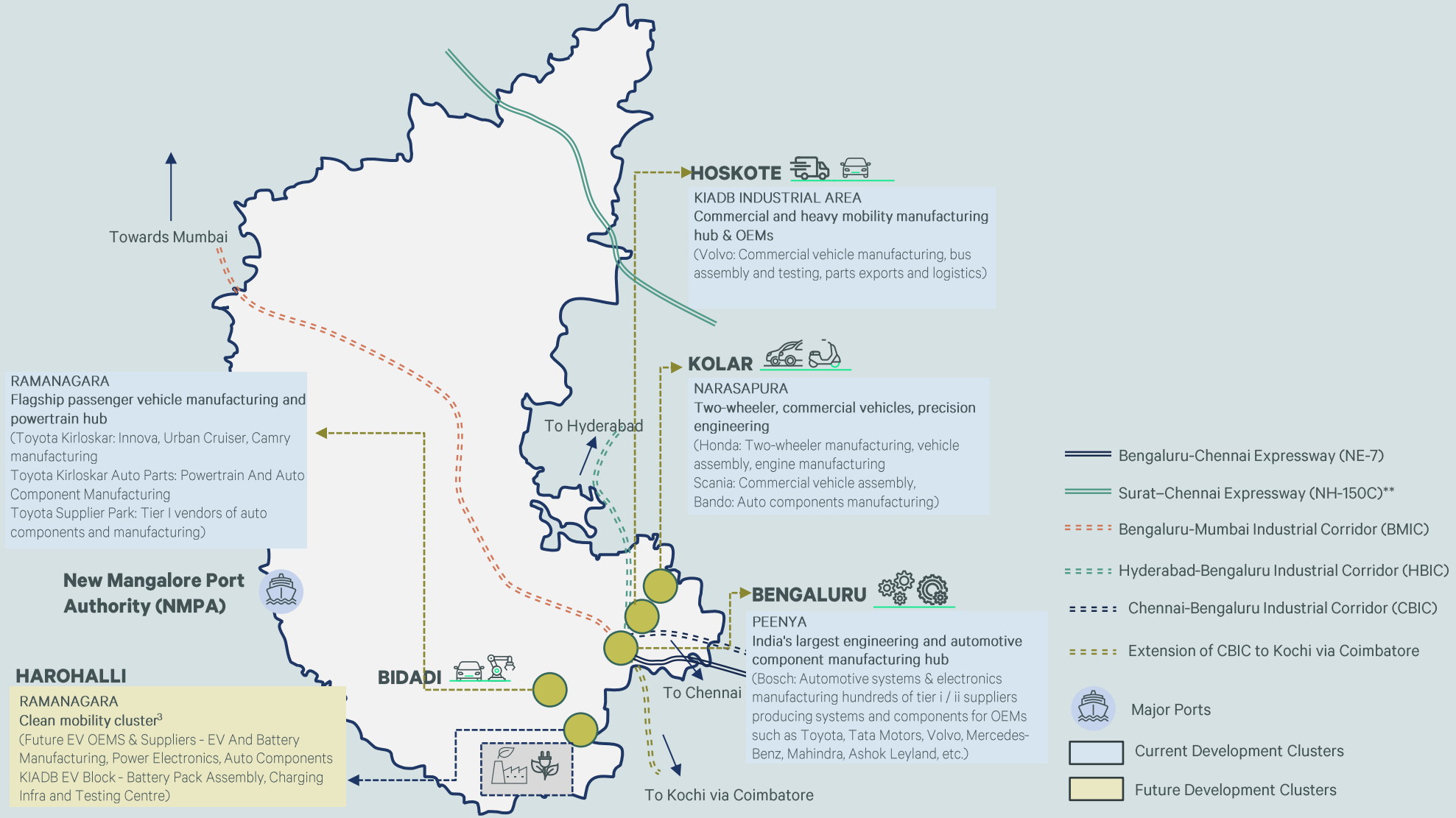
INR 13,000 crore
MOU - State & TATA Motors to establish EV battery plant & become an EV manufacturing hub

Source: 1. Gujarat Industrial Policy 2026, 2. Publicly available information, July 2026, 4. India Industrial Land Bank, July 2026 5. Publicly available information
Note: AI-generated image, used for illustrative purposes only.

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Karnataka: Automotive Innovation & EV Manufacturing Base

Karnataka is at the forefront of the automobile and EV manufacturing, emphasizing modernisation and next-generation technologies, including additive manufacturing and advanced battery cell production. The state ranks as the fourth-largest automobile producer in India, contributing 8.5%[1] to national output. Karnataka has emerged as a center for electric mobility, with more than 45 EV startups[2] and several OEMs. Through its Clean Mobility Policy, Karnataka seeks to attract USD 6 billion[3] in investments between 2025 and 2030 and position itself as Asia's premier green transportation hub.



Source: 1. Invest Karnataka, Karnataka Udyog Mitra, August 2026, 2. Karnataka Industrial Policy, 2025-2030, 3. Karnataka Clean Mobility Policy (2025) fosters EV production using lithium ion and fuel cell components and innovation within hydrogen fuel cell to promote sustainability, ** Under construction. Note: Map not to scale, for representational purposes only

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Karnataka

Automotive innovation & EV manufacturing base

Utilities

Power: Reliable power for industrial areas
Water: 8,500 acres industrial township with pre-provisioned water infrastructure[1]



OEM Ecosystem

7 major automotive OEMs[2]

Ancillary Ecosystem

50+ auto component manufacturers[2]

Workforce

Number of Workers: 105,000+

Industrial Real Estate[3]

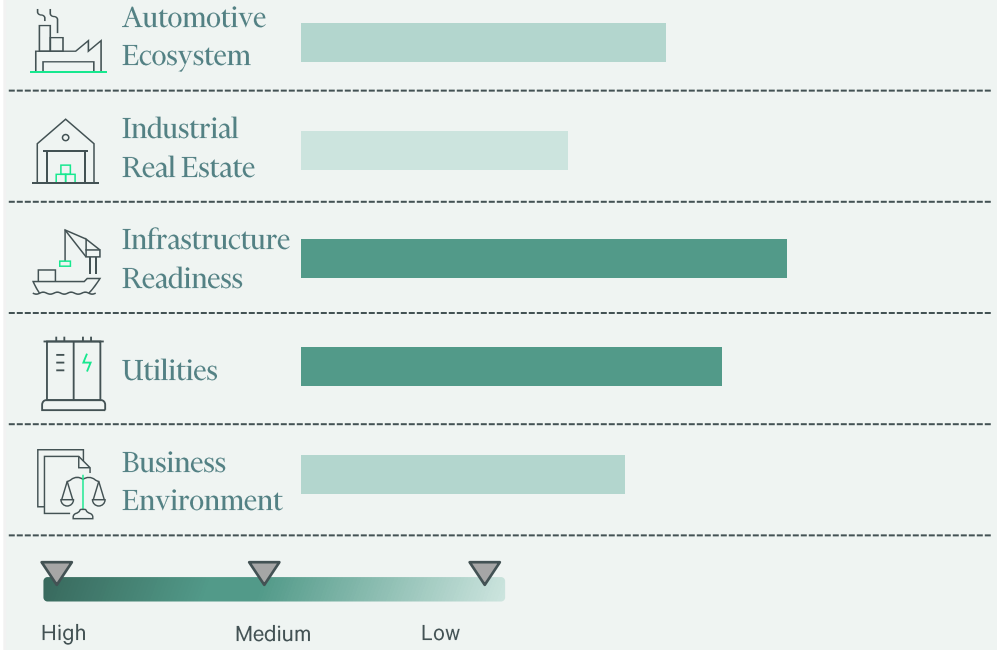
340+ number of industrial parks	95%+ Mixed-use + Auto & component industrial parks
35,000+ Ha. of industrial land	3,500+ ha. of land available

Infrastructure Readiness

Key Ports
Mangaluru, Karwar

Highways
Major National Highways, Chennai-Bengaluru & Hyderabad-Bangalore Industrial Corridors

Automobile Manufacturing Readiness Matrix



Charting the Roadmap to Growth[4]

INR 50,000 crore
Targeted investments in clean mobility sector

4th
Largest automobile producer in the country

8.5%
Contribution to India's total automobile production

INR 1,300 crore
Invested by Toyota in Bidadi to manufacture hybrid engines

700 acres
Development for dedicated EV hub in the emerging Harohalli cluster

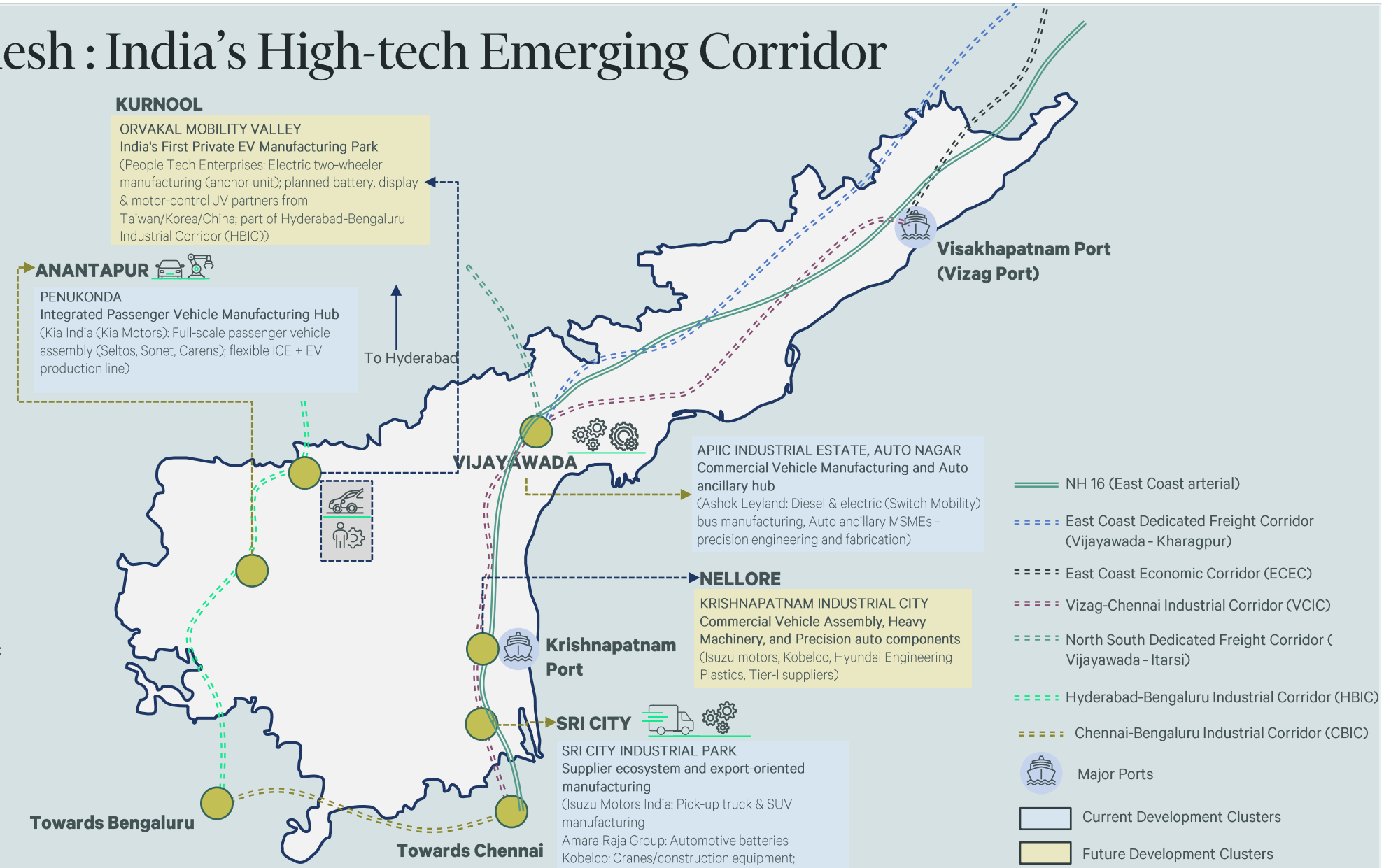
Source: 1. Prime Minister, Shri Narendra Modi lays foundation stone to South India's 1st Industrial Corridor Project, the Tumakuru Industrial Township, as part of National Industrial Corridor programme, Ministry of Commerce & Industry, February 2023 2. Invest Karnataka, Karnataka Udyog Mitra, July 2026 3. India Industrial Land Bank, July 2026 4. Publicly available information

Note: AI-generated image, used for illustrative purposes only.

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Andhra Pradesh : India's High-tech Emerging Corridor

Andhra Pradesh has emerged as one of India's leading destinations for next-generation automotive and EV manufacturing. From 2014 to 2024, the auto and auto components sector contributed 6%[1] of the state's realised industrial investments, underscoring its significance within Andhra Pradesh's manufacturing ecosystem. The state is unique in India for possessing two dedicated freight corridors, which strengthens its role in the national logistics and trade network. The state's government has identified advanced manufacturing, including automobiles, EVs, and clean mobility, as a priority sector under its Industrial Development Policy 4.0 and Sustainable Electric Mobility Policy (2024-29).[1]



Source: 1. Andhra Pradesh Industrial Development Policy, 2024-2029; Note: Map not to scale, for representational purposes only

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Andhra Pradesh

India's high-tech emerging corridor



Utilities

Power: 24x7 quality power committed to all industries[1]
Water: Plug & Play parks offer bulk water at preferential rates, cutting operational costs by up to 25%[2]

OEM Ecosystem

3 core OEMs including KIA, Isuzu, & Ashok Leyland[5]

Ancillary Ecosystem

1,500+ auto component factories[4]

Workforce

Number of Workers: 32,000+

Infrastructure Readiness

Key Ports
Visakhapatnam, Krishnapatnam

Highways
Major National Highways, Vizag-Chennai, Hyderabad-Nagpur, & Hyderabad-Bengaluru Industrial Corridor

DFC
East Coast DFC (Vijayawada-Kharagpur) & North South DFC (Vijayawada-Itarsi)

Logistics
Upcoming Multi-modal logistics park in KRISCITY, Nellore

Industrial Real Estate[5]

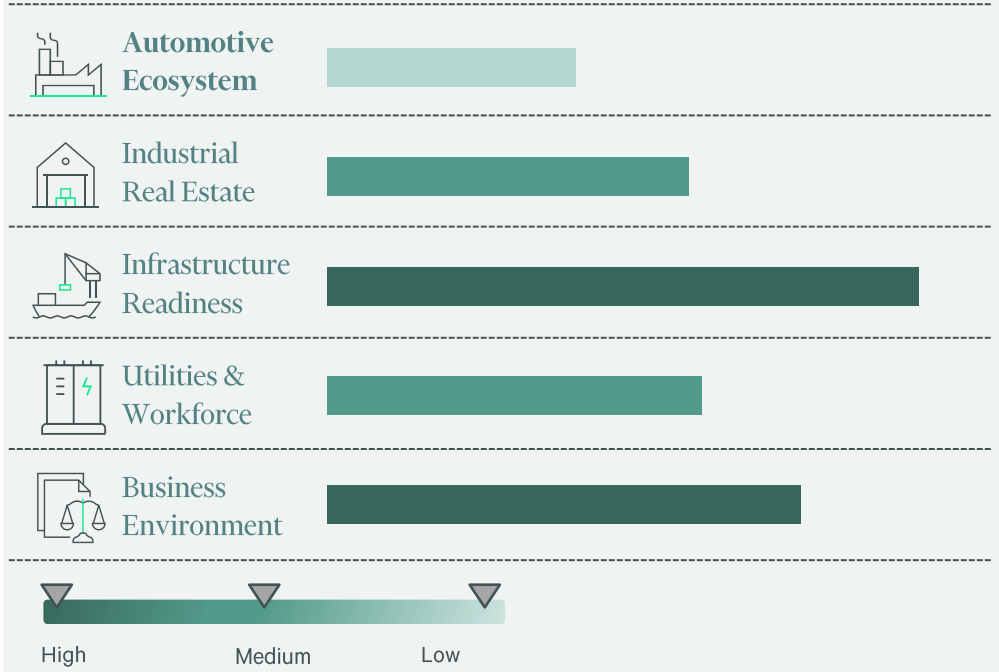
635+ number of industrial parks

25%+ Mixed-use + Auto & component industrial parks

110,000+ Ha. of industrial land

10,500+ ha. of land available

Automobile Manufacturing Readiness Matrix



Charting the Roadmap to Growth[6]

INR 50,000 crore
Investments in automotive manufacturing and development

20%
Contribution to India's two-wheeler, four-wheeler and EV manufacturing

21-23%
Industrial sector's contribution to GSDP

INR 3,200 crore
Invested by Hero MotoCorp in expansion of the Tirupati manufacturing campus

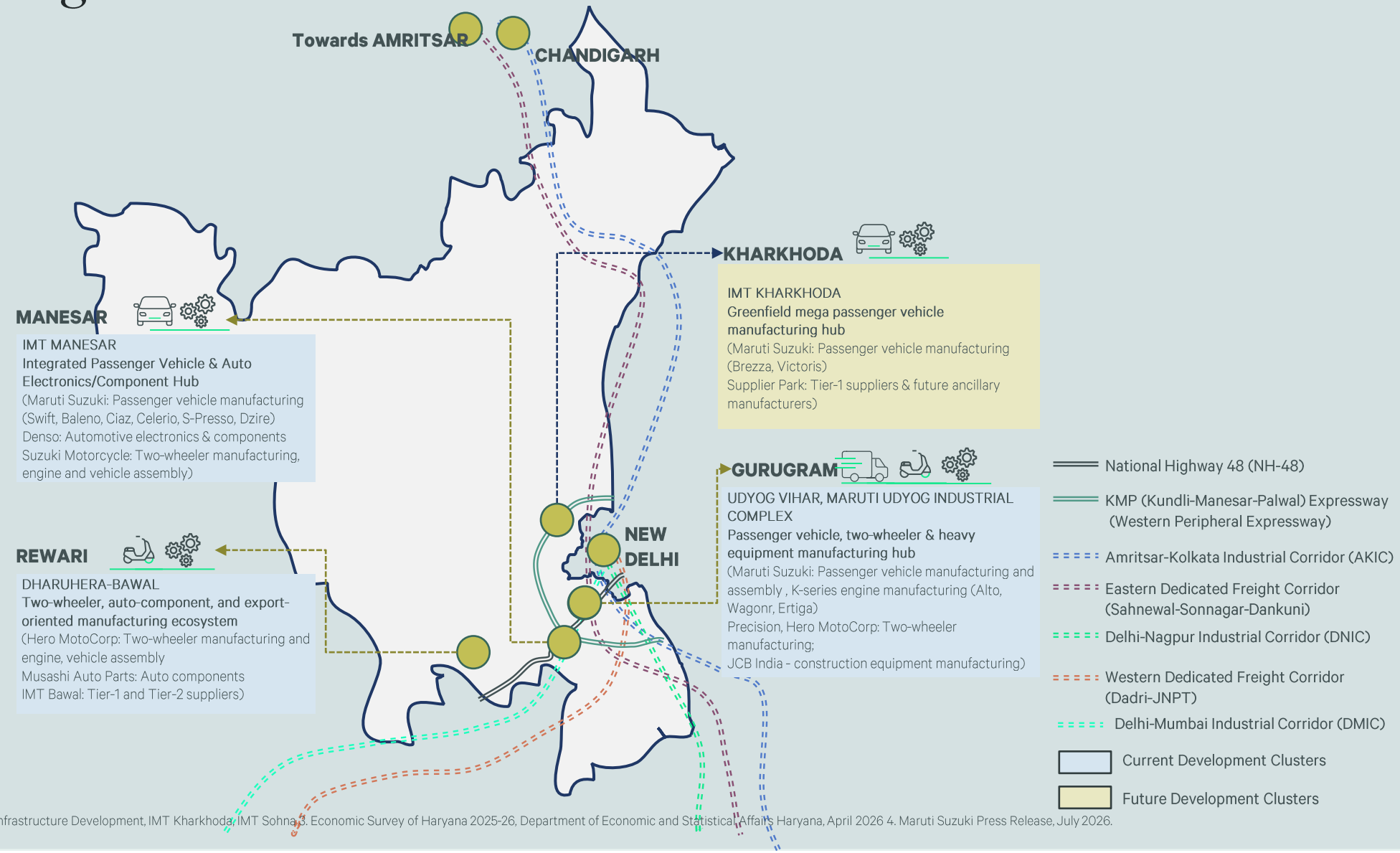
INR 250 crore
Allocated for developing five model e-mobility cities

Source: 1. Andhra Pradesh Industrial Policy, 2024-2029 2. AP Plug and Play Infrastructure Policy 4.0 3. Sri City News, August 2026 4. Andhra Connect, 2024 5. India Industrial Land Bank, July 2026 6. Publicly available information Note: AI-generated image, used for illustrative purposes only.

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Haryana: Leading Hub for Automotive Innovation

Haryana hosts several major automobile manufacturing plants, supported by an established base of 31 industrial townships and clusters[1], as well as two emerging world-class industrial townships at Kharkhoda (3,200+ acres)[2] and Sohna (1,500+ acres)[2]. The industrial sector is a cornerstone of Haryana's economy, contributing over ~33% to the state's GVA[3]. Over the past decade, the region has rapidly evolved into a leading destination for large-scale industrial investments. Maruti Suzuki's development of one of Asia's largest automotive manufacturing plants in Kharkhoda, covering 800 acres, represents an investment of INR 35,000 crore[4]. In addition to its scale, the facility is expected to catalyse a robust industrial ecosystem, creating significant opportunities for tier-1 and tier-2 suppliers, logistics partners, and secondary businesses throughout the region.



Source: 1. India Industrial Land Bank, July 2026 2. HSIIDC, Infrastructure Development, IMT Kharkhoda, IMT Sohna 3. Economic Survey of Haryana 2025-26, Department of Economic and Statistical Affairs Haryana, April 2026 4. Maruti Suzuki Press Release, July 2026.
Note: Map not to scale, for representational purposes only

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Haryana

Leading hub for automotive innovation

Utilities

Power: 100% government assistance for independent power feeders to Mega/Ultra-Mega project sites[1]
Water: Guaranteed water supply[1]



OEM Ecosystem

50 OEMs with 10+ core ones[2]

Ancillary Ecosystem

230+ auto component manufacturers[3]

Workforce

Number of Workers: 35,000+

Infrastructure Readiness

Logistics
Multi-modal hub in Mahendragarh & IMC Hisar

Highways
NH-48 connectivity, Delhi-Mumbai, Delhi-Nagpur, Amritsar-Kolkata Industrial Corridors

DFC
Western Dedicated Freight Corridor & Eastern Dedicated Freight Corridor

Land
Plug-and-play zones at IMT Kharkhoda & IMT Sohna

Industrial Real Estate[4]

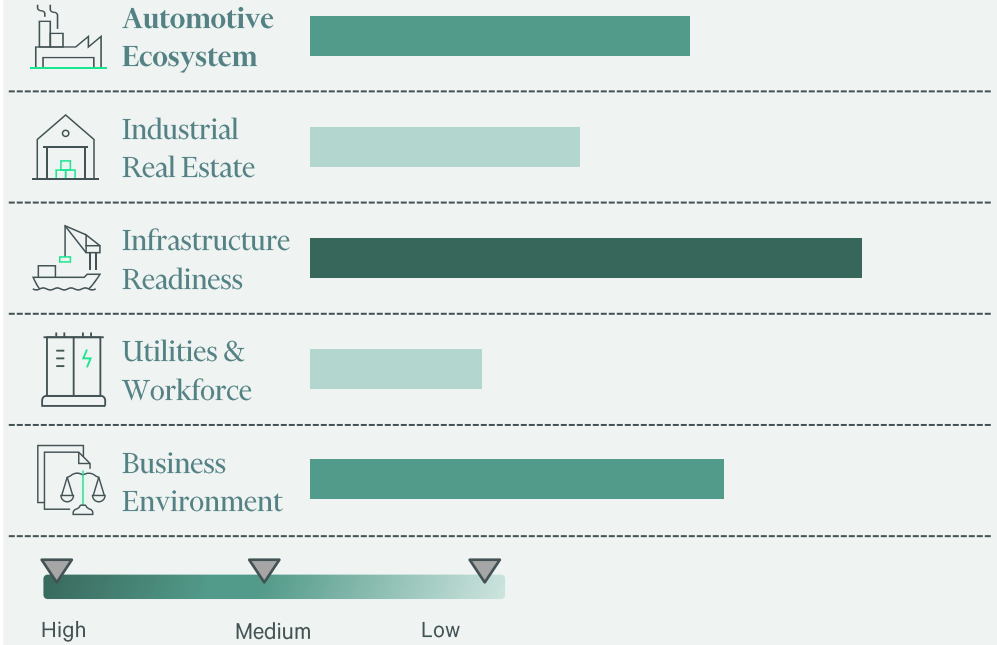
45+ number of industrial parks

80%+ Mixed-use + Auto & component industrial parks

14,100+ Ha. of industrial land

7,000+ ha. of land available

Automobile Manufacturing Readiness Matrix



Charting the Roadmap to Growth[5]

INR 823 crore
Dedicated funds under the EV policy

INR 5 lakh crore
Expected investment flows under the state's Industrial policy

INR 35,000 crore
Invested by Maruti Suzuki for expansion at its IMT Kharkhoda plant

INR 3,000 crore
Invested by Amperex Technology in lithium-ion battery plant in IMT Nuh – 2025

60%
Maruti Suzuki production comes from the state

Source: 1. Haryana Industrial Policy, 2025 2. Industries & Commerce Department, Haryana Government, December 2020 3. Directorate of MSME, Haryana 4. India Industrial Land Bank, July 2026
5. Publicly available information. Note: AI-generated image, used for illustrative purposes only.

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Projected Trends Across States Over the Next Decade

Shift in Manufacturing Requirements

Traditional assembly lines / mechanical toolrooms are expected to evolve towards high-powered robotic EV lines, dedicated battery assemblies, and cleanrooms[1]. This shift could also increase the need for shared, dedicated infrastructure—such as future mobility parks, common testing centres, and localised semiconductor and battery-material supply chains.

Grid & Power Infrastructure Upgrades

Standard industrial sub-stations could be replaced with decentralised solar generation and energy-storage systems[2]. These clusters are expected to decouple from conventional utility models by implementing fully renewable-powered operations, local biogas plants, and extensive highway fast-charging networks to guarantee sustainable, round-the-clock power.

Next-gen Skill Shift

Specialised certifications in lithium-ion battery manufacturing, EV drivetrain testing, mechatronics, and IoT could be leveraged to build a future-ready workforce and introduced under various states' skill policies. State governments and industry majors are upgrading Industrial Training Institutes (ITIs), establishing Centres of Excellence, and rolling out targeted EV-focused certification programs to support the reskilling of legacy ICE workers.

EV-ready Infrastructure

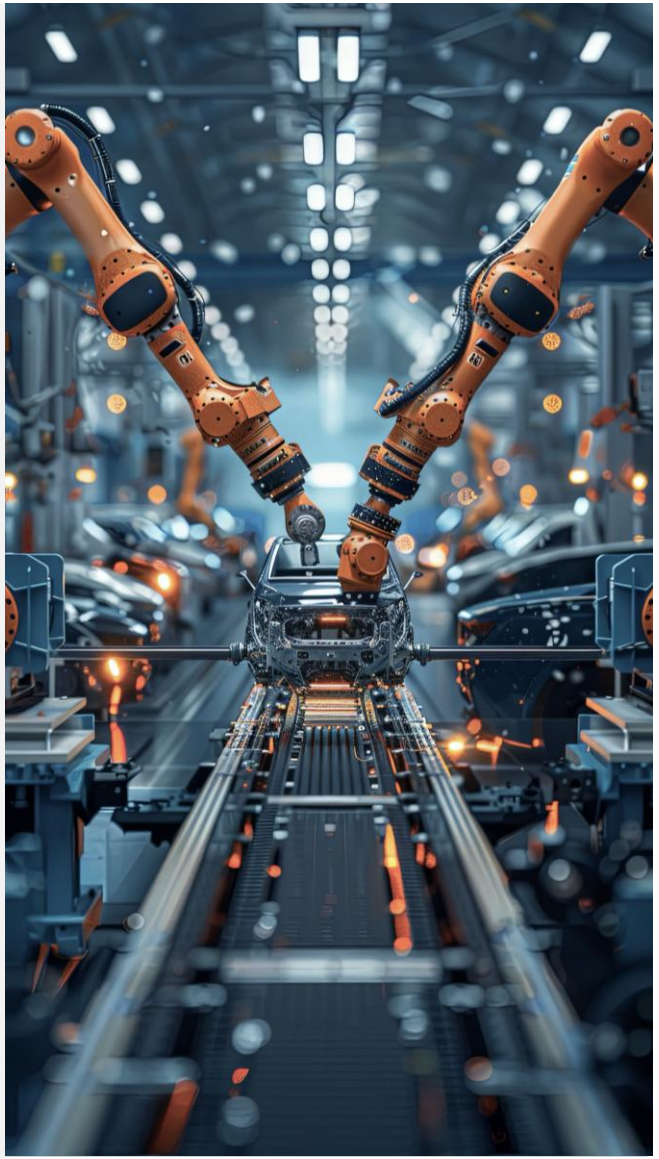
Comprehensive, ecosystem-driven frameworks that surpass conventional manufacturing facilities are expected to ensure long-term operational sustainability. State policies and master plans are incorporating advanced infrastructure, including multi-lane autonomous vehicle and drone testing tracks, plug-and-play zones for small component assemblers, and dedicated battery-recycling hubs.

Streamlined Logistics Space

Standard distribution warehouses are likely to be replaced by urban dark stores and micro-fulfilment hubs for circular battery recycling[3]. Master-planned nodes with access to major transit corridors and airports could drastically cut freight times, expand regional warehousing demand, and attract multi-billion-dollar investments earmarked for global supply chains. Furthermore, the integration of adjacent, plug-and-play supplier and vendor parks could allow these clusters to foster tight-knit industrial ecosystems while simultaneously embedding strict sustainability templates.

Greenfield Industrial Parks

Purpose-built industrial cities such as Dholera, Orvakal Mobility Valley, and IMT Kharkhoda are being developed as part of broader manufacturing and mobility ecosystems. The integration of modern, sustainable infrastructure that is difficult to retrofit into older legacy estates could give these locations an advantage in accommodating clean power, advanced manufacturing, export logistics and supporting infrastructure.



Note: 1. A cleanroom is a highly controlled, isolated manufacturing environment designed to maintain extremely low levels of pollution to protect sensitive products from contamination and to ensure regulatory compliance; 2. Solar + Energy Storage Hubs are on-site industrial microgrids that combine solar panels with large-scale batteries to generate, store, and deliver uninterrupted, low-cost clean power directly to a facility; 3. Circular battery recycling is a closed-loop process which involves extraction of raw minerals from spent batteries and feed them back into manufacturing new batteries to minimise waste.

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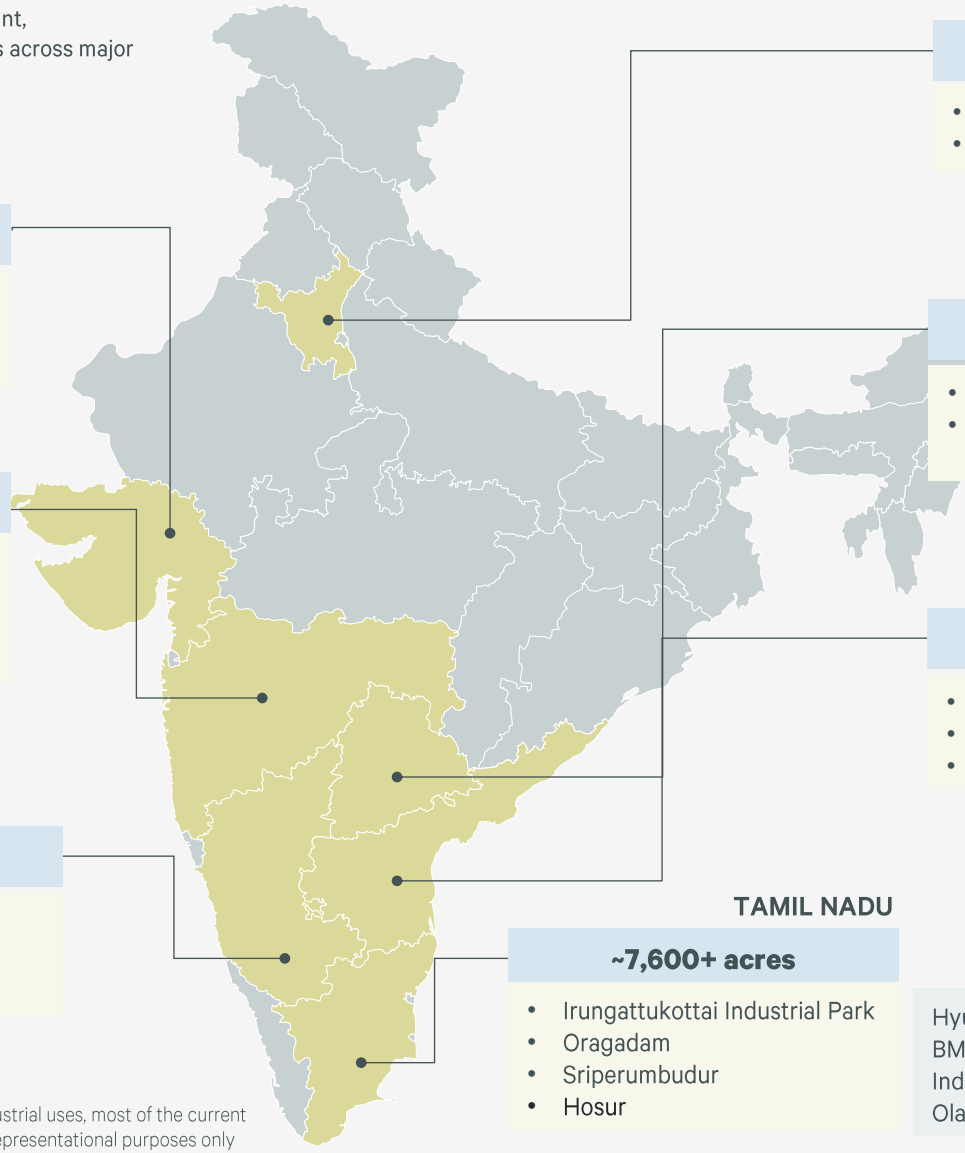
03

The Real Estate Intersect: Auto & Ancillary Footprint

An overview of industrial and warehousing demand, occupier composition, facility formats, and asset quality across key markets.

India's Automotive Industrial Land Footprint

The map illustrates India's automotive manufacturing footprint, highlighting established OEM plants and component clusters across major manufacturing markets.



GUJARAT

~34,500+ acres

- Mandal-Bechraji
- Sanand
- Khoraj

Maruti Suzuki, Tata Motors, MG Motor, Honda Motorcycle and Scooter India, Denso India, Tata AutoComp Systems

MAHARASHTRA

~35,300+ acres

- Chakan-Talegaon
- Satpur, Ambad, Sinnar MIDC, AURIC City

Mahindra & Mahindra, Škoda Auto Volkswagen India, Mercedes-Benz India, Tata AutoComp Systems, Bosch India, Ather Energy

KARNATAKA

~2,900+ acres

- Bidadi
- Hoskote
- Narasapura

Toyota Kirloskar Motor, Denso, Ather Energy, TVS Motor company, Ola Electric, Bosch India, Volvo Trucks & Buses, Autoliv, Honda Motorcycle & Scooter

HARYANA

~5,800+ acres

- IMT Manesar
- IMT Kharkoda

Maruti Suzuki India, Suzuki Motorcycle, Honda Motorcycle and Scooter India, Autoliv India, Marelli India

TELANGANA

~4,000+ acres

- NIMZ Zaheerabad
- Patancheru-Pashamylaram

Mahindra & Mahindra, Hyundai, Stellantis, Benelli India, Olectra Greentech

ANDHRA PRADESH

~4,100+ acres

- Sri City Industrial Park
- Penukonda
- Nellore

Isuzu Motors India, Nippon Seiki, Kia India, Hyundai Mobis, Hero MotoCorp, Ashok Leyland

TAMIL NADU

~7,600+ acres

- Irungattukottai Industrial Park
- Oragadam
- Sriperumbudur
- Hosur

Hyundai Motor India, Eicher Motors, BMW India, Renault-Nissan Automotive India, Apollo Tyres, Yamaha Motor India, Ola Electric

Total area of industrial parks / regions earmarked for mixed and automotive sectors

Prominent automotive clusters

Source: India Industrial Land Bank, August 2026, CBRE Research H1 2026

Note: Although the number of acres shown is designated for mixed and industrial uses, most of the current activity is dominated by the automotive sector. Note: Map not to scale, for representational purposes only

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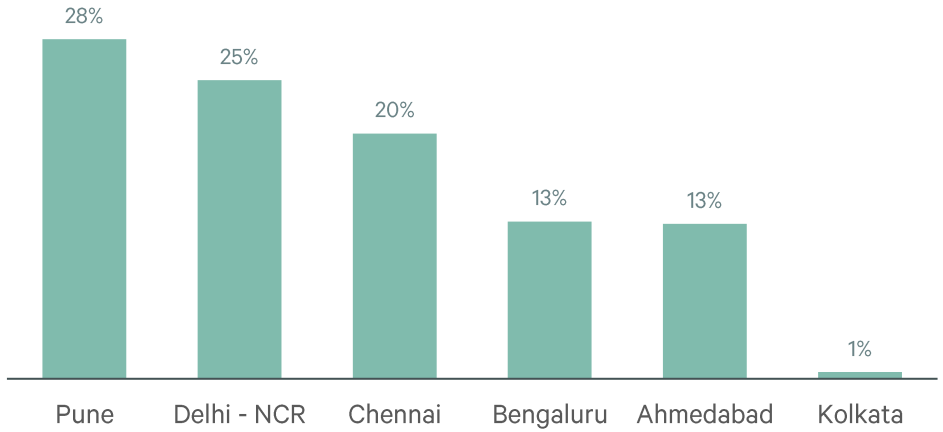
Auto & Ancillary Sector's Industrial Real Estate Footprint

The slide examines the operational footprint of India's automotive sector within industrial parks, focusing specifically on space take-up by OEMs across light industrial units.

With leasing activity of ~5.4 million sq. ft. between 2024 and the first half of 2026, the automotive and ancillary sector constituted ~13% of India's built-up industrial demand. During this period, Pune accounted for the highest share in leasing at ~28%, closely followed by Delhi-NCR and Chennai at 25% and 20% respectively.

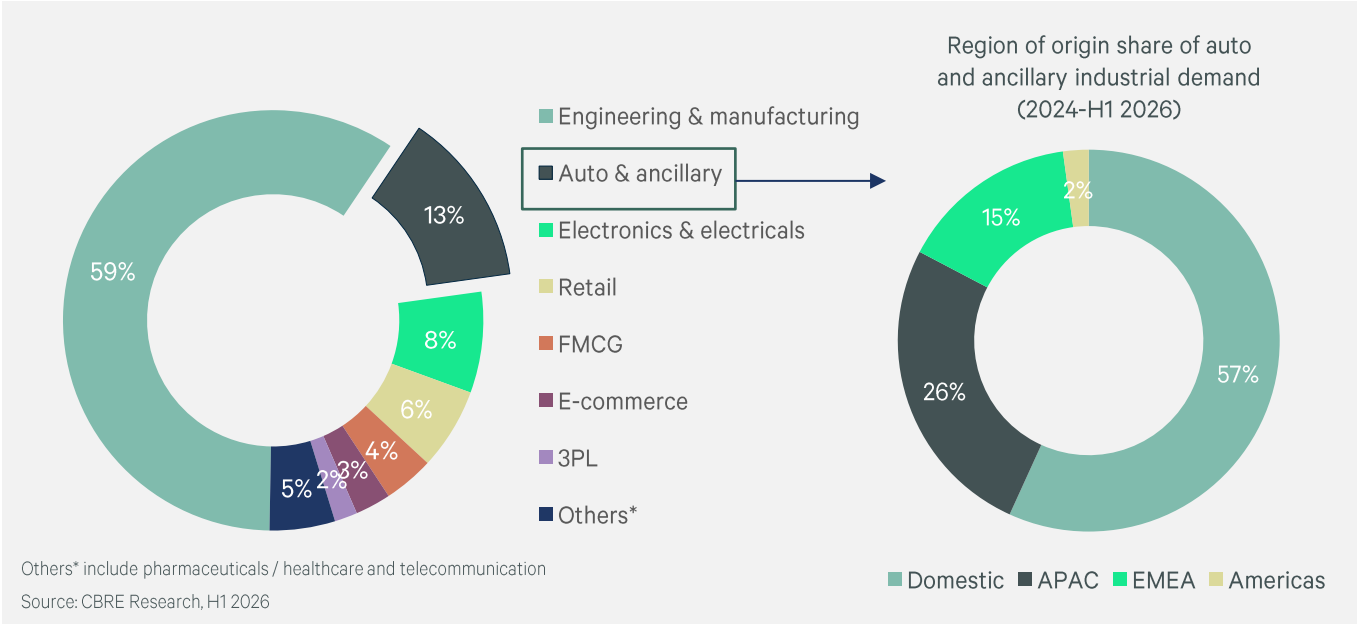
Between 2024 and H1 2026, transaction sizes shifted noticeably as occupiers favoured larger facilities. The share of leases between 100,000 and 200,000 sq. ft., as part of total space take-up, stood at 46% in H1 2026 followed by leases exceeding 200,000 sq. ft. at 38%.

Figure 3.1: City-wise share of auto and ancillary industrial demand (2024-H1 2026)



Source: CBRE Research, H1 2026

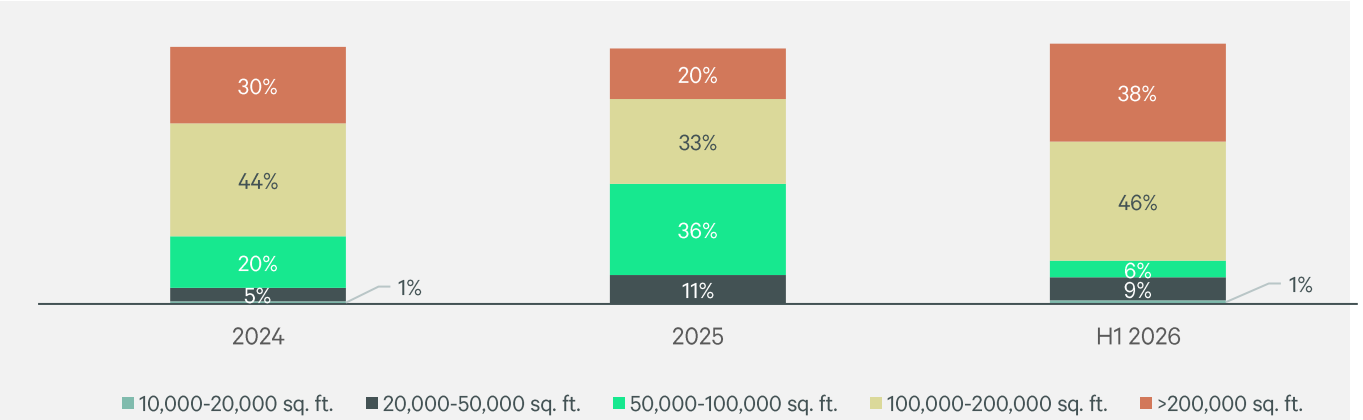
Figure 3.2: Auto and ancillary sector's share of industrial demand (2024-H1 2026)



Others* include pharmaceuticals / healthcare and telecommunication

Source: CBRE Research, H1 2026

Figure 3.3: Size-wise segmentation of auto and ancillary industrial demand (2024-H1 2026)



Source: CBRE Research, H1 2026

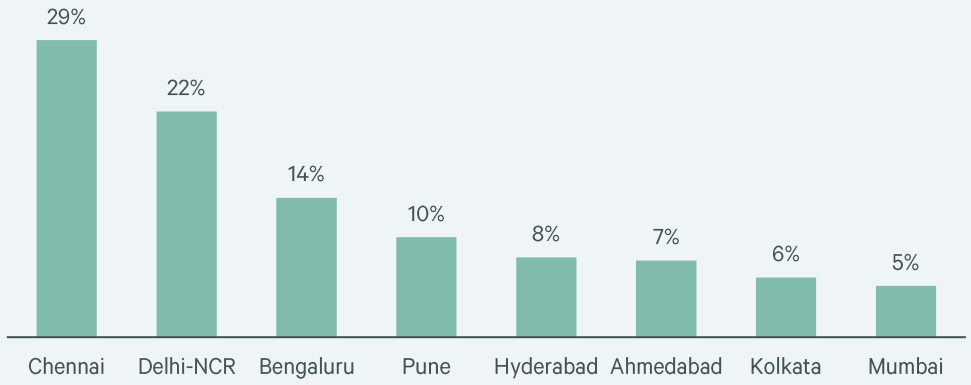
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Auto & Ancillary Sector's Warehousing Real Estate Footprint

The slide examines demand dynamics within the automotive sector, focusing on occupier requirements across Grade-A warehousing, central distribution hubs, and regional storage facilities.

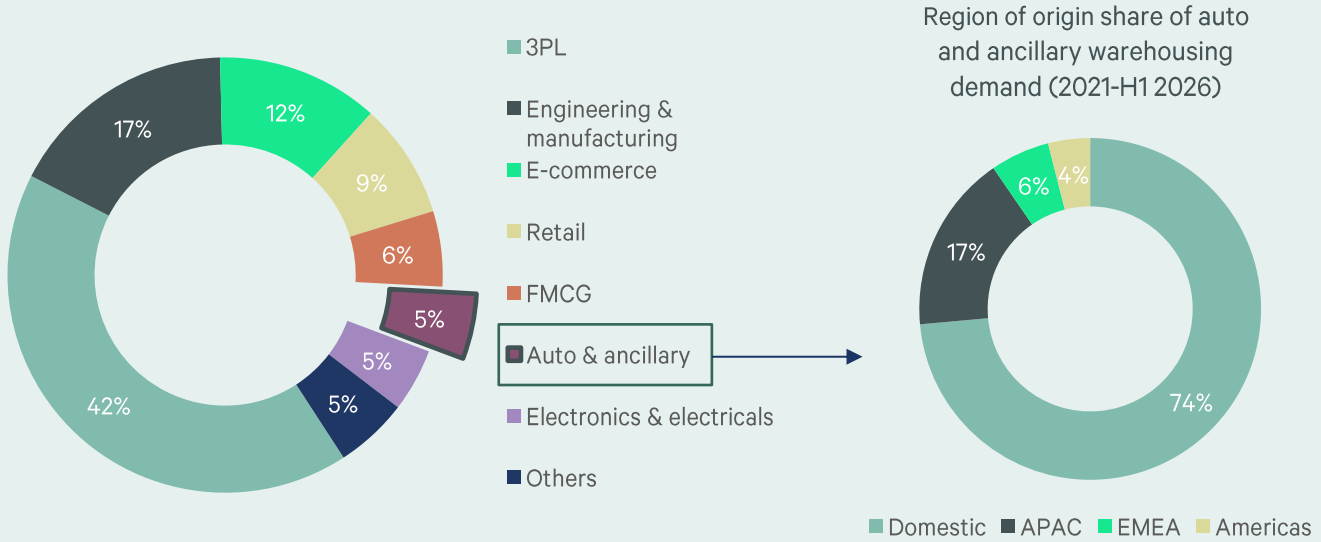
With the leasing activity of ~12.4 million sq. ft. between 2021 and the first half of 2026, the automotive and ancillary sector constituted ~5% of India's warehousing demand. During this period, Chennai accounted for the highest share in leasing at ~29%, closely followed by Delhi-NCR and Bengaluru at 22% and 14% respectively. Mirroring industrial sector trends, the warehousing segment also witnessed a clear shift towards larger facilities. Space take-up for warehouses between 100,000 and 200,000 sq. ft. expanded from 21% in 2021 to 31% in H1 2026.

Figure 3.4: City-wise share of auto and ancillary warehousing demand (2021-H1 2026)



Source: CBRE Research, H1 2026

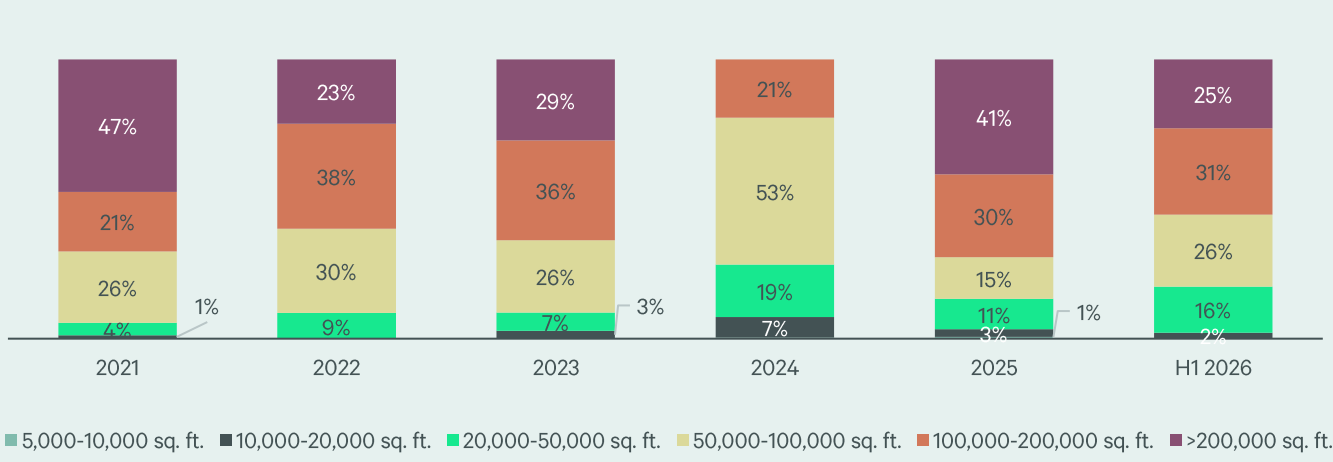
Figure 3.5: Auto and ancillary sector's share in warehousing demand (2021-H1 2026)



Others include pharmaceuticals / healthcare and telecommunication

Source: CBRE Research, H1 2026

Figure 3.6: Size-wise segmentation of auto and ancillary warehousing demand (2021-H1 2026)



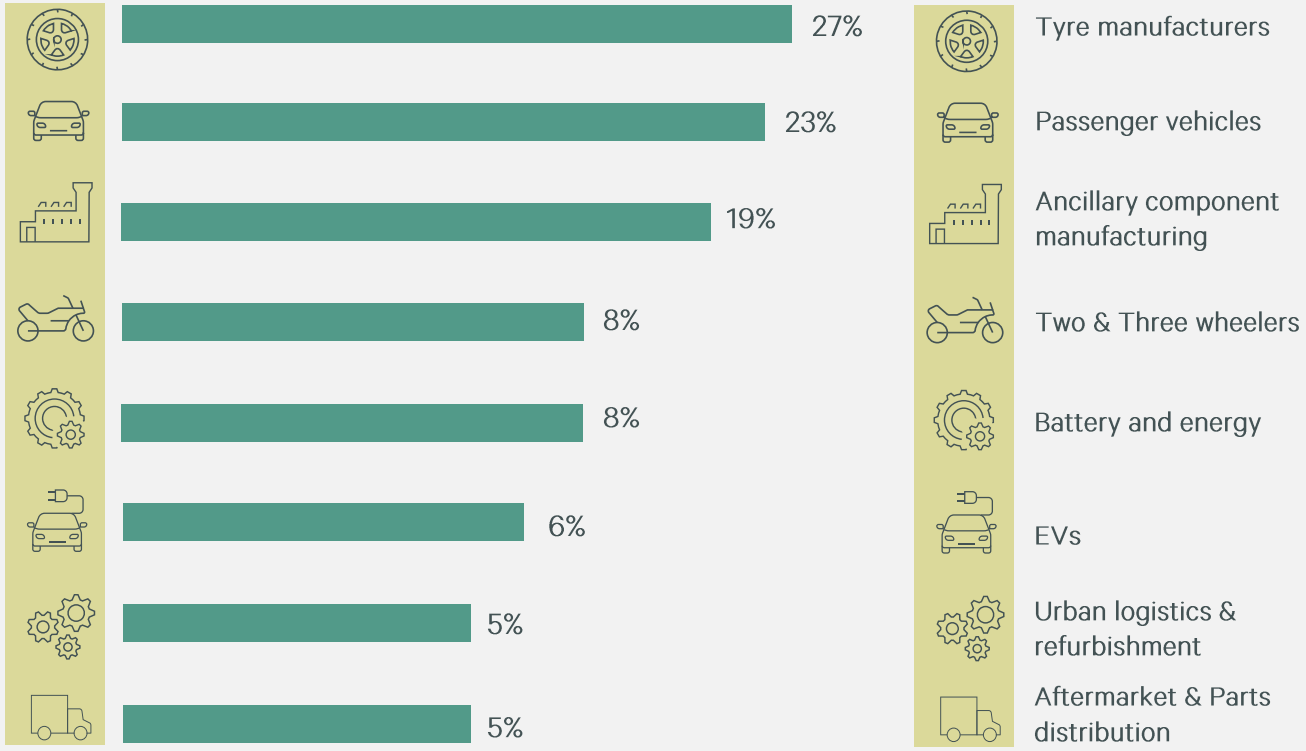
Source: CBRE Research, H1 2026

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Auto & Ancillary Warehousing: Occupier Trends

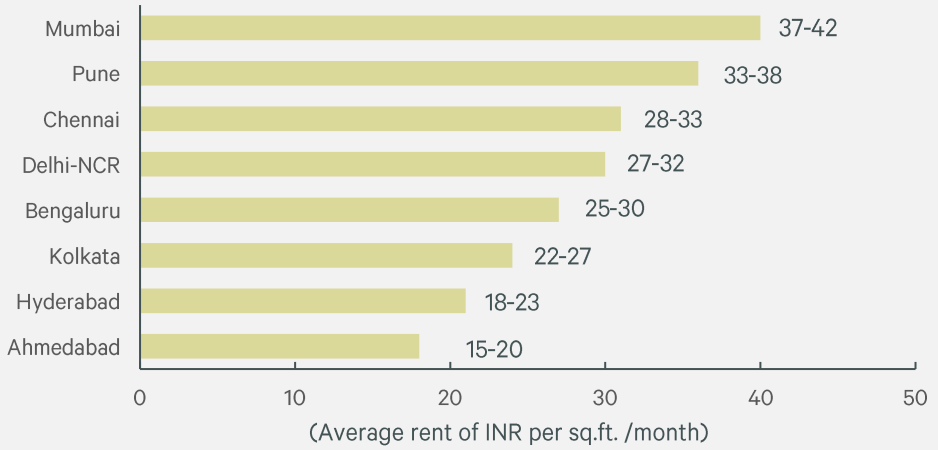
The demand for automotive and ancillary warehousing is driven by activity from both original equipment manufacturers (OEMs) and the broader component supply chain. Tyre manufacturers represented the largest share at 27%, followed by passenger vehicle manufacturers at 23% and ancillary component manufacturers at 19%. Between 2021 and Q2 2026, major occupiers included MRF, Honda Motors, Toyota, Apollo Tyres, Royal Enfield, Exide Industries, Tata AutoComp Systems, Spinny, and Eicher Motors. Among tier-I Indian cities, Mumbai recorded the highest warehousing rental range, at INR 37-42 per sq. ft. per month in Q2 2026, followed by Pune and Chennai.

Figure 3.7: Auto and ancillary warehousing demand by occupier segment (2021-H1 2026)



Source: CBRE Research, H1 2026

Figure 3.8: City-wise warehousing rentals (Q2 2026)



Source: CBRE Research, H1 2026

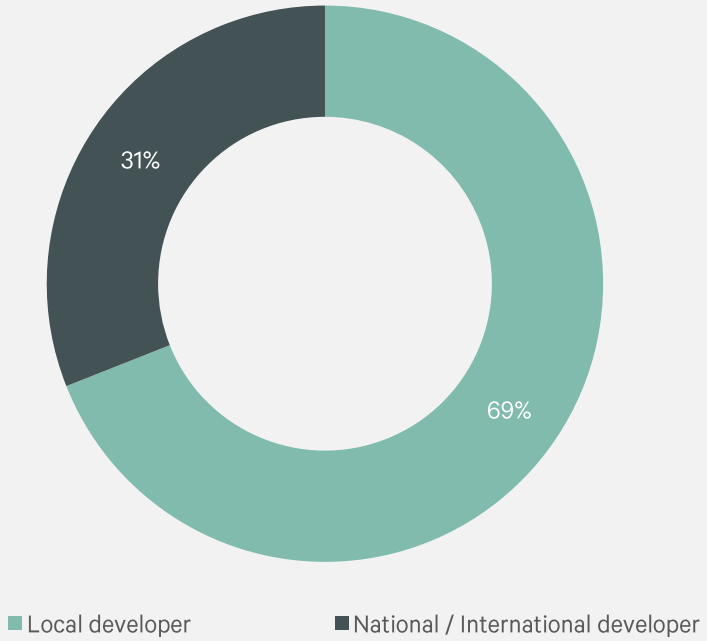
- **Dominant segments:** Passenger vehicles, tyre manufacturers, and ancillary component manufacturers together accounted for **69%** of demand during 2021-H1 2026.
- **Tyre-led demand in H1 2026:** Tyre manufacturers represented **67%** of the sector's total leasing during the period under review.
- **EV occupiers:** EV-related occupiers accounted for **6%** of space take-up during the period, & **10%** in H1 2026.

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Demand Shifts towards Modern Facilities[1]

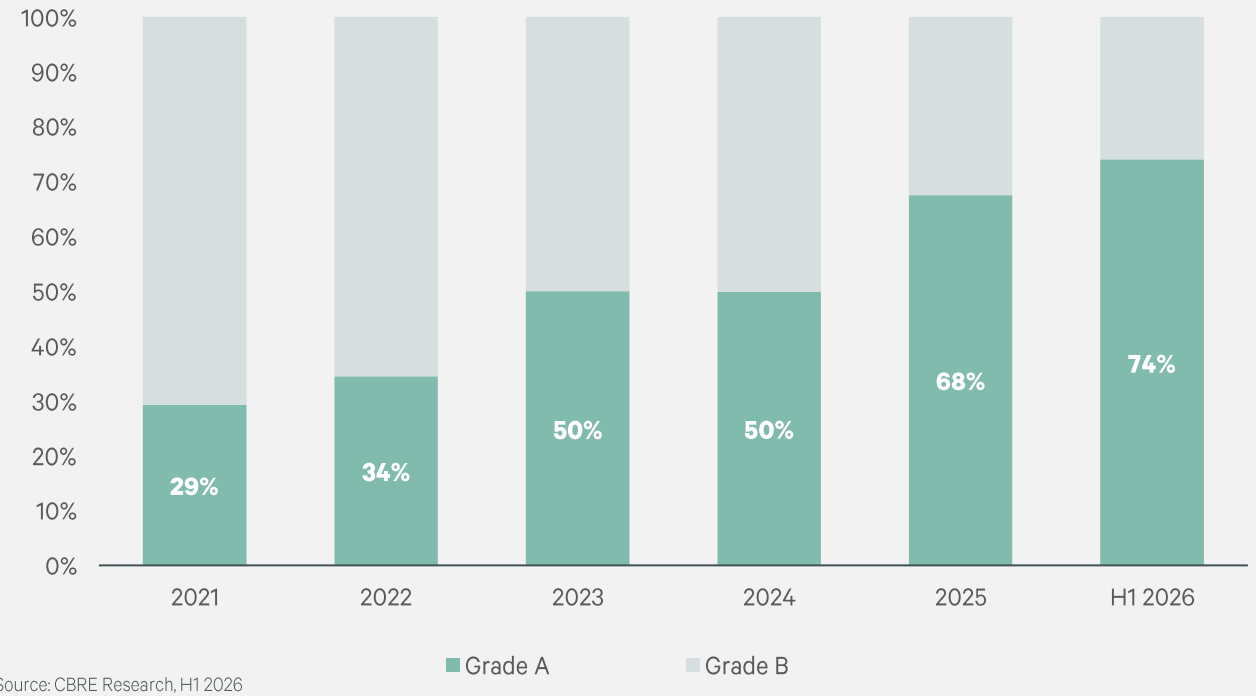
Leasing activity in the automotive and ancillary sector has increasingly shifted towards modern logistics infrastructure, as reflected by rising demand for Grade A facilities. The share of Grade A assets in total space take-up rose from 50% in 2024 to 68% in 2025, reaching 74% in H1 2026. This absorption in Grade A facilities was primarily driven by commercial vehicle and tyre manufacturers (27% each), followed by passenger vehicle OEMs at 23%.

Figure 3.9: Auto & ancillary warehousing leasing by developer type (2021-H1 2026)



Source: CBRE Research, H1 2026

Figure 3.10: Auto & ancillary warehousing: Share of Grade A and Grade B leasing (2021-H1 2026)



Source: CBRE Research, H1 2026

Between 2021 and H1 2026, local developers accounted for 69% of leasing in the auto and ancillary sector, while national and international developers represented the remaining 31%. This pattern coincided with the continued expansion of India's organised warehousing footprint, with total stock projected to reach 516 million sq. ft. by the end of 2026.

Source: 1. Modern facilities comprise high-quality, durable construction, automation & technology integration, sustainable features, digitized, plug-and-play ready infrastructure along with multimodal, strategic connectivity.

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04

Automotive Site Selection Priorities

How domestic and international occupiers assess land, regulatory certainty, ecosystem access and facility readiness

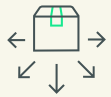
The Domestic Automotive Playbook

Agility, cost-efficiency and rapid capital reuse key priorities



Flexible Expansion Options

- Domestic occupiers, particularly tier-II/tier-III component suppliers and aftermarket distributors, typically favour smaller, incremental land parcels that allow capacity to expand with demand. This aligns with their shorter demand-visibility cycles and faster decision timelines.
- Some OEMs also acquire existing capacity from departing global players instead of pursuing greenfield development. Tata Motors' acquisition of Ford's Sanand plant in Gujarat for INR 725.7 crore[1] brought together the land, machinery, and workforce in a single transaction, enabling production to begin within a year and generating estimated savings of USD 519 million (INR 5,000 crore)[2].



Proximity to aftermarket retail distribution hubs

- Many domestic occupiers prioritise proximity to consumption centres and dealer networks over location within an investment-grade park. Aftermarket distribution, in particular, requires dense regional coverage for spares and service parts. Operators, therefore, often use multiple mid-sized facilities rather than one large, consolidated site.



Developer Tie-ups

- Several domestic tier-II and tier-III component manufacturers work directly with local developers or secure land allotments through the state governments. As their operations may not require premium global specifications, they can opt for non-institutional facilities at lower rental or acquisition costs, although asset standards may be less consistent.



Standard Policy & Tax Benefits

- Indian OEMs typically utilise state industrial policies offering capital subsidies, stamp-duty exemptions, subsidised land and power-tariff concessions.
- Large central incentives such as the ACC Battery Storage PLI scheme, which requires a minimum capacity of 5 GWh, and Champion OEM incentives, which carry a minimum revenue threshold of INR 10,000 crore, have relatively high entry barriers. Smaller tier-II and tier-III suppliers and aftermarket operators therefore tend to rely on more widely accessible measures, including the corporate tax rate under Section 115BAA and state-level subsidies.

1. Tata Motors Press Release, August 2022; 2. Autocar Professional, June 2024

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The International OEM Entry & Delivery Framework

Navigating compliance, land diligence, platform selection, and policy structuring for institutional success



Strict Compliance Mandates

- International occupiers, particularly Japanese and Korean OEMs, typically follow stringent quality, safety, and ESG standards that facilities in India must meet before any commitment is made. These include environmental compliance documentation, fire & safety certifications, and parent-company audits that may exceed standard Indian regulations. Therefore, such players often favour industrial parks with an established track record of delivering built-to-suit facilities for global clients.



Clear and Unencumbered Titles

- Japanese and Korean OEMs generally prefer long-tenure land with clear, unencumbered titles, reflecting decision-making cycles of 9-18 months and multi-decade capital expenditure horizons. Ambiguities related to ownership claims, succession or disputed agricultural-to-industrial conversion can derail site selection and affect investment decisions. Global occupiers may, therefore, reject parcels that domestic players could be more willing to consider.



Global developer platforms

- International occupiers evaluating sites in India often favour institutional Grade A developer platforms over standalone land acquisition, as these platforms can reduce title, compliance and utility-related risks. This preference is visible in the Chakan-Talegaon corridor in Pune, where ESR and IndoSpace host global occupiers such as Mercedes-Benz, BMW and Volkswagen, along with domestic players such as Mahindra & Mahindra. Their standardised, sustainable built-to-suit facilities offer the delivery assurance and due diligence expected by global occupiers.



Policy Negotiation Posture & Tax Benefits

- International automotive entrants often negotiate customised incentive packages through specialised legal and advisory teams rather than relying solely on standard policies and schemes. This typically involves coordination across central ministries, state governments and district-level agencies for PLI incentives, state subsidies, utility approvals and local compliances.
- Global EV and battery manufacturers may also evaluate central incentives such as PLI-ACC and the Champion OEM scheme during the early stages of investment planning.

Source: CBRE Research, H1 2026

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The International Players in Action

Market entry, expansion, and investment examples



The Classic Greenfield MoU: Kia's Anantapur Plant[1]

- An MoU signed directly with the Andhra Pradesh government for a USD 1.1 billion, 536-acre greenfield site (April 2017).
- Long gestation period: More than 2 years from MoU signing to production.
- Integrated supplier planning embedded in the original site agreement ensuring the facility would host multiple supplier companies.
- Kia Motors explicitly cited "skilled labour" and "supply chain" as key decision-making factors.



The Government-Anchored Corridor: Toyota's Bidkin Plant[2]

- Announced in 2026, with production targeted for 2029 and capacity of 100,000 vehicles / year.
- Preference for Maharashtra's National Industrial Corridor Development Corporation (NICDC)-anchored industrial corridors.
- Designated area for EVs, automotive, aerospace, and electronics, with occupiers including JSW, Lubrizol, and Ather Energy.





The Cautious Approach: European OEMs' Kit Assembly Model[3]

- Small-scale, low volume assembly operations (<20,000 vehicles / year) using CKD (Completely Knocked-Down)[3] kits by BMW, Mercedes-Benz, Audi, Volvo.[4]
- Use of imported kits.
- Limited footprint to avoid large land / capex commitments until justified by increased demand in India.



The Strategic Acquisition: Hyundai's Takeover of GM India's Talegaon Plant[5]

- The transaction illustrates how brownfield acquisitions can offer international players a faster route to scale, while greenfield MoUs may remain more relevant for new market entry.

1. Kia Motors Press Release, 2017; 2. Toyota Bharat Press Release, May 2026; 3. A CKD assembly line is a factory setup where separate parts are assembled to create a product to avoid massive customs duty on fully assembled imported cars levied by the Indian government; 4. Company Press Releases; 5. Hyundai Press Release, August 2023

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Ecosystem to Site Selection

A high ecosystem-readiness score does not automatically guarantee a predictable site decision, as operational requirements are unique to every occupier. The framework below examines how occupiers narrow their choices before selecting specific facilities and formats.



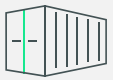
Ecosystem Readiness

1. **Policy check:** Central / state baseline checks
2. **Fiscal framework:** Tax setup – Section 115BAB, PLI, etc.)
3. **Labour selection:** Securing a skilled workforce pipeline through tie-ups with local technical institutes



Shortlisting the Corridor

1. **Cluster selection:** Proximity to NICDC industrial corridors* or established automotive players
2. **Risk mitigation:** Auditing for unencumbered, clean land titles
3. **Developer grade:** Vetting investment-grade landlords



Facility

1. **Design parameters:** Built-to-suit (BTS) vs. pre-built – captive or multi-tenant
2. **Technical specs:** Floor-load tolerances and ceiling heights
3. **ESG:** LEED / IGBC / GRIHA / EDGE certifications



Final Selection

1. **Capital strategy:** Long-term leasehold vs. freehold
2. **Expansion potential:** Buying / reserving adjoining plots for tier 1, 2….n suppliers
3. **Compliance audit:** Meeting parent-company ESG standards

Lease vs. ownership: What drives the choice?

LEASE

- Tier-2 / 3 component suppliers with shorter demand-visibility cycles
- 3PL / logistics / aftermarket distribution operators
- New entrants testing India as one of the global sourcing options before committing capex
- Light manufacturing occupiers seeking immediate access to pre-built, institutionally compliant infrastructure without undergoing multi-year development timelines

OWN

- Anchor OEM assembly plants with 15-20+ year capex horizons
- Battery / cell manufacturers who require highly customised, non-standard facility specifications (e.g. EV setups require complex, highly specialised lines separating batteries, vehicle framing, and final assembly across three distinct sheds)
- Occupiers seeking land-banking optionality for future capacity
- Shift-intensive occupiers looking to avoid traffic gridlocks and operational constraints of shared business parks during peak periods

Source: CBRE Research, H1 2026 | Note: *A network of futuristic, master-planned industrial zones being developed under India's flagship National Industrial Corridor Development Programme (NICDP);

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Ecosystem to Site Selection

The framework should not be viewed as a comprehensive assessment in isolation. Occupiers need to account for their unique supply-chain dynamics. CBRE Research evaluates site selection across four pillars: transportation networks, physical site capabilities, operational feasibility, and commercial viability.



Sourcing Capability

Component & raw material access

1. **CoG (Centre of Gravity):** From tier-1, 2....n component clusters as well as steel, aluminium, and casting / forging clusters
2. **Supplier density:** Total component manufacturing base within radius
3. **Port accessibility:** Proximity to port for imported inputs (battery cells, semiconductors, etc.)
4. **Raw materials:** Distance from raw-material logistics corridors



Distribution Capability

Inbound JIT (just-in-time) / JIS (just-in-sequence) + outbound finished-vehicle logistics

1. **Logistics cost comparison:** Inbound component movements, JIT / JIS deliveries, outbound finished vehicles
2. **Access to infrastructure:** Access to rail siding / auto-carrier rail infrastructure; highway / expressway connectivity and car-carrier cargo capacity
3. **Port accessibility:** Proximity to port / inland port for export-oriented plants



Site Attributes

1. **Utility access:** Dedicated substation for EV / battery-specific power load, ZLD* / water terms
2. **Site connectivity:** Daily commute feasibility for the workforce and uninterrupted movement of components and finished vehicles
3. **Ease of development:** Site readiness for construction, including land topography



Commercials

1. **Commercial cost:** Land acquisition / lease cost benchmarked against the project's capex
2. **Title clarity:** Litigation-free land title, free of encumbrances, ease of conversion from agricultural to industrial use (wherever applicable)
3. **State-level incentives:** Capital subsidies, tax concessions, single-window clearance support

Source: CBRE Research, H1 2026 | Note: *ZLD stands for Zero Liquid Discharge, which is an advanced water treatment process that cleans industrial wastewater.

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Real Estate Requirements by Occupier Type

Facility, format, technical specifications, power needs and expansion approach

	Facility format	Height	Power load	Expansion
OEM Assembly (ICE / EV)	Large integrated campus (200-1,000+ acres)	11-15 m clear height for press / body shops	Very high, dedicated substation	Phased campus with land banking for future assembly lines
Battery / Cell Manufacturing	Dedicated gigafactory format, climate-controlled	Controlled humidity, specialised floor specifications, including integrated vapour barriers	Extremely high, continuous supply critical	Modular expansion in tranches tied to demand
Tier-1 / Tier-2 Component Manufacturers	Mid-sized industrial shed (5-20 acres) in a supplier park adjoining an OEM facility	8-12 m clear height	Moderately high	Flexible, often co-located near the anchor OEM
EV Charging & Infrastructure-linked Occupiers	Distributed/retrofitted into retail / residential / commercial + dedicated public charging land parcels	Not applicable	Grid capacity at distribution level	Roll-out based rather than campus-based
Aftermarket / Logistics & 3PL	Grade A warehouse (100,000+ sq. ft.)	10-14 m clear height, dock levellers	Standard	Scalable, lease-based model

Source: CBRE Research, H1 2026; Note: Floor load capacity typically ranges between 10 - 12 tons per sq. mt.

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05

Action Framework: Policy, Real Estate, and Execution Priorities

The next phase of automotive investment will require clearer policy frameworks, purpose-built facilities, reliable infrastructure, and sharper execution strategies

Government, Policy & Reforms

Transitioning from bureaucratic approvals to statutory certainty

Fast-track title clearance

Title ambiguity is a major deterrent for international greenfield entrants. Therefore, it is essential to establish clear title clearance especially for EV / battery corridors.

Statutory PLI execution

The PLI scheme has experienced implementation gaps relative to its stated targets. Addressing PLI implementation gaps requires shifting from discretionary approvals to fixed statutory conditions. This aligns with recent data centre tax reforms under the Taxation and Other Laws (Amendment) Bill, 2026, which replaced case-by-case notifications with clear, self-certifiable criteria.[1]

Auditable ZLD and recycling norms

The Water Act (1974) and the Environment Protection Act (1986) regulations enforce rules for heavy polluters (red category) or those extracting groundwater from regions with limited resources. Legacy ZLD rules address tanneries, distilleries, pulp and paper, chemicals, and pharmaceutical industries. In contrast, auto and battery manufacturing sectors are excluded from these regulations and need clear wastewater standards.

Extend Sustainable Mobility Corridor infrastructure

Sustainable mobility corridors benefit from enhanced funding and robust governance structures. Flagship routes are equipped with EV charging stations at 25-km intervals and offer toll exemptions in select states. Expanding these provisions to secondary clusters would extend the corridor framework to additional key industrial hubs.

Build skilling pipelines

Of the 161 official vocational Qualification Packs in India, only 18 are related to EVs[2], and current ITI lab infrastructure is inadequate for high-voltage battery systems. Given shortages in specialized EV talent (battery pack design, BMS, power electronics), occupiers should use the 2–3-year MoU-to-production window to partner with technical boards, co-develop curricula, and upgrade lab infrastructure rather than treating it merely as construction lead time.

Utilise India's newly opened FTA position

Developments around the India-UK CETA and the India-EU FTA represent initial efforts to dismantle protectionist policies in the automotive sector. In light of modest export volumes, policymakers could leverage opportunities within recent FTAs and the SEZ 2.0 / DESH hybrid domestic-export model to develop a cohesive export strategy.

Source: CBRE Research, H1 2026; 1. The Taxation and Other Laws (Amendment) Bill, 2026, Ministry of Finance, Aug 2026; 2. Outlook of Future Mobility Jobs Market in India with EV Transition, Climate Policy Initiative, February 2026

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Developer Product Strategy

Converting industrial real estate into institutional platforms

Offer hybrid land products

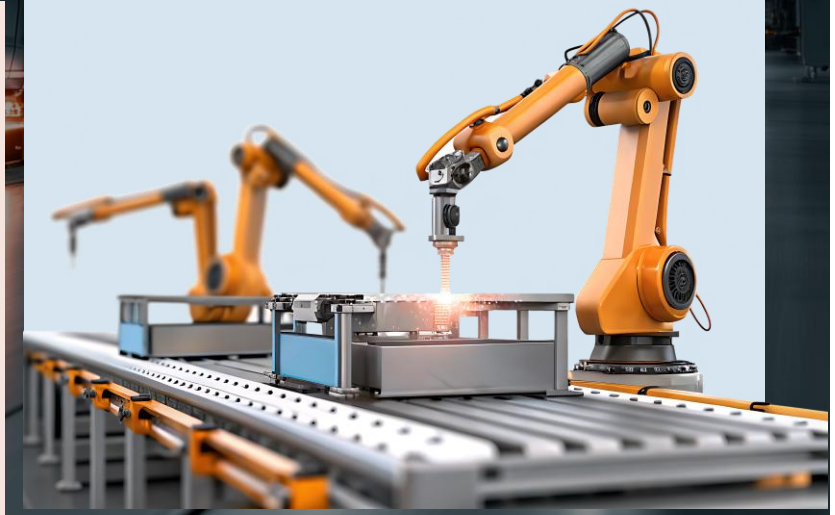
India's land market centres on two core offerings: state-backed plots (MIDC / GIDC, 500+ sq. m.) that provide flexible, incremental parcels where domestic suppliers can scale, and institutional Grade A parks (25+ acres) that offer pre-cleared, BTS capacity for major global and domestic occupiers. Developers offering both models within a single corridor are best positioned to capture full-spectrum market demand.

Design battery / EV-ready shells

Given the stringent environmental requirements of battery manufacturing such as specialised dry rooms[1] with moisture-barrier shell construction and high-capacity power infrastructure, retrofitting these into a standard Grade A industrial asset post-construction is technically complex and cost-intensive. Therefore, developers expanding into the battery and EV sector should integrate dry-room standards directly into initial shell designs.

Build institutional-grade platforms in new, emerging clusters

India's industrial stock remains predominantly non-institutional, with institutional platform supply concentrated in high-activity clusters. Notably, the fastest-growing battery and EV clusters are located outside these established areas and rely primarily on government-allotted plots. This supply-demand gap presents a significant first-mover opportunity for institutional developers in new and emerging corridors.



Position brownfield acquisitions as a distinct product

Occupiers have traditionally pursued brownfield acquisitions to expedite market entry. Developers who consolidate and package brownfield assets can address the legal and regulatory bottlenecks that often delay such transactions. By retrofitting facilities for EV and technology capabilities, developers can provide plug-and-play options via sale-and-leaseback models or Joint Development Agreements (JDAs) for specific tenant requirements.

Site evaluation through a sourcing and distribution lens

While occupiers prioritize sourcing and distribution during site selection, developers must evaluate these factors independently. A site's true viability hinges on three supply chain variables: proximity to component clusters, inbound JIT / JIS logistics costs, and outbound corridor access for finished vehicles. Standard land-readiness scores frequently overlook these critical determinants of operational sustainability.

Source: CBRE Research, H1 2026; 1. A dry room is a specialist production area that uses industrial dehumidification systems to control humidity allowing manufacturing processes or research primarily using moisture-sensitive materials.

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Occupier Execution Playbook

Navigating risks, market entry and cost benchmarking

Dynamic benchmarking

India has clear advantages in factor costs (land, base labour, raw construction), but Southeast Asian peers (Vietnam, Indonesia, Thailand) lead in tariff-free access, logistics efficiency, and statutory tax sunsets. Occupiers should continue to assess India's cost and tax position against other APAC economies regularly, as the gap is narrowing.

Define the India strategy: Domestic, export, or dual play?

Occupiers building new capacity now face a clear choice about which market their India investment is meant to serve. The site-selection process should explicitly reflect this decision rather than leave it to default assumptions.

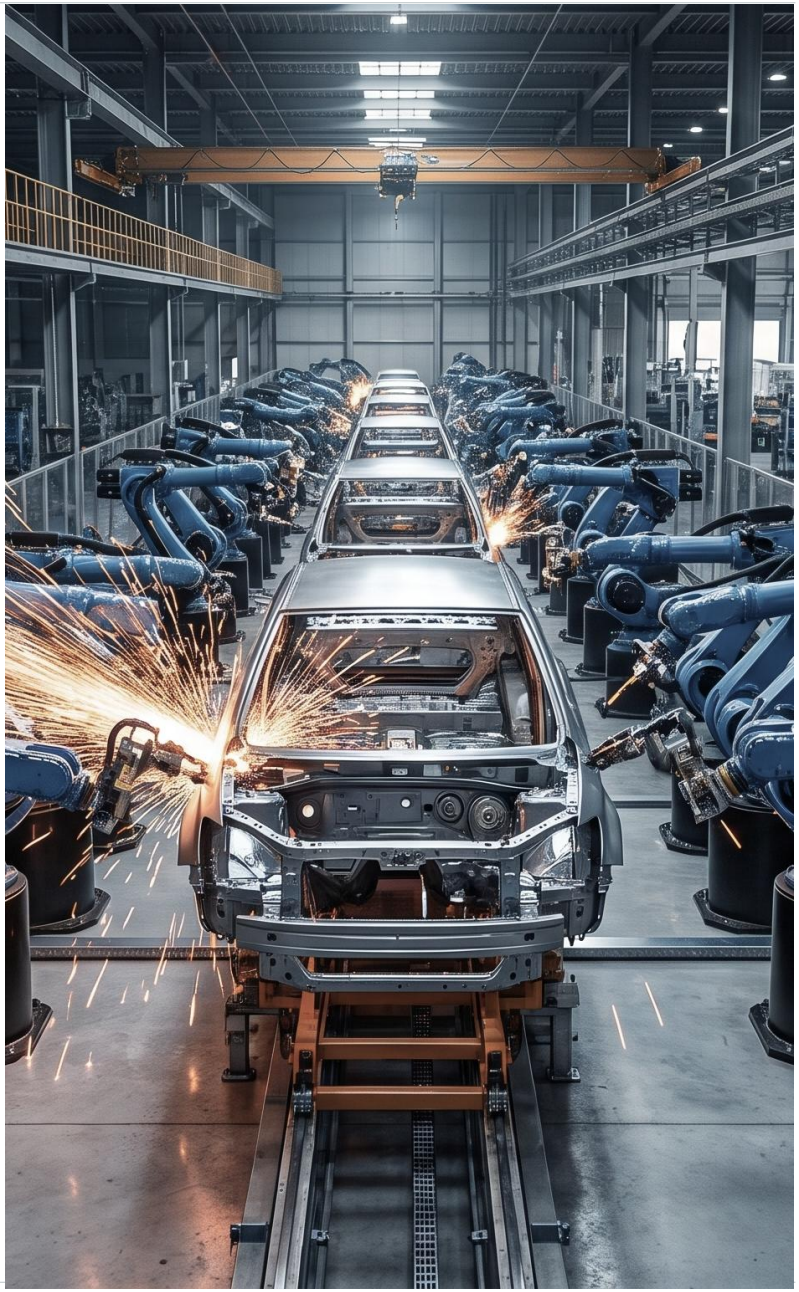
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Assess greenfield expansion vs. brownfield acquisition

An occupier’s operational tenure in India should dictate whether they pursue a greenfield expansion or a brownfield acquisition. Site selection must reflect this strategic priority rather than rely on default location criteria.

Scrutinise water and ZLD contract terms

While land title diligence in India is well-established, operational environmental assessments remain inconsistent. Site evaluation checklists frequently prioritize physical geohazards such as flood zones over functional water and Zero Liquid Discharge (ZLD) infrastructure. Therefore, occupiers should independently verify park-level wastewater compliance rather than relying on developer disclosures.



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- RIYADH BIOTECH CITY
- INTEGRATED LOGISTICS PARK, JEDDAH

UAE
- JEBEL ALI TERMINAL 1 REDEVELOPMENT PROJECT
- ABU SHABI DERIVATIVES AND CONVERSION PARK
- ABU DHABI REGIONAL PLAN ECONOMIC STRATEGY
- RAS AL KHAIMAH ECONOMIC ZONE
- SHARJAH AIRPORT FREE ZONE
- FUJAIRAH FREE TRADE ZONE
- INDUSTRIAL CITY OF ABU DHABI (ICAD)
- ABU DHABI OIL & GAS SERVICES COMPLEX

OMAN
- GREEN HYDROGEN DERIVATIVE PARK, DUQM
- INDUSTRIAL CLUSTERS IN SHINAS AND KHASAB
- 'AIRPORT INDUSTRIAL CITY' - SALALAH AIRPORT

AFRICA

SENEGAL
- DAKAR SPECIAL ECONOMIC ZONE

GUINEA
- CONAKRY ECONOMIC TOWNSHIP

KENYA
- KENGEN INDUSTRIAL PARK IN NAIVASHA

REPUBLIC OF CONGO
- POINTE NOIRE PORT BASED SEZ
- OYO OLLOMBO AGRO SEZ

NIGERIA
- OGUN AIRPORT ECONOMIC ZONE
- LAGOS FREE TRADE ZONE
- EKITI SPECIAL AGRO INDUSTRIAL PROCESSING ZONE
- INTEGRATED ECONOMIC CITY OF ABIA
- SEZS KWARA AND MAKURDI

GABON
- NATIONAL INDUSTRIAL DEVELOPMENT PLAN

IVORY COAST
- PORT BASED ECONOMIC ZONE

EGYPT
- ALEXANDRIA INDUSTRIAL ZONE
- INDUSTRIAL PARK - BORG EL ARAB

TANZANIA
- INVESTMENT ADVISORY FOR GOVERNMENT FUND

SOUTH & SOUTHEAST ASIA

INDONESIA
- JAMBI RIVER PORT SEZ & INDUSTRIAL PARK

MYANMAR
- THILAWA SEZ
- KYAUK PHU SEZ

SRI LANKA
- GREATER HAMBANTOTA REGION

VIETNAM
- LONG HAU INDUSTRIAL PARK
- YEN BINH INDUSTRIAL PARK
- FUTALAND INDUSTRIAL TOWNSHIP

LAOS
- VIENTIANE SMART INDUSTRIAL CITY DEVELOPMENT

SINGAPORE
- INDUSTRIAL PARK AT TERENGGANU
- PERAK HI-TECH INDUSTRIAL PARK

MALAYSIA
- HIGH - TECH SPACE CITY

CAMBODIA
- REAM CITY, SIHANOUKVILLE

INDIA

- DMIC PERSPECTIVE PLAN
- NICDC - MANUFACTURING CLUSTER IN AGRA, JODHPUR PALI, ORVAKKAL, PALAKKAD, DHARWAD, AURANGABAD, RATLAM, PITHAMPUR, & OTHERS
- MARUBENI NEXGEN INDUSTRIAL PARK
- ECONOMIC MASTERPLANNING FOR SAMRUDDHI MAHAMARG, MAHARASHTRA
- AURIC - FOOD PARK IN MAHARASHTRA
- KHED CITY, PUNE
- DAHEJ INDUSTRIAL AREA, GUJARAT
- RAJKOT AVIATION PARK, GUJARAT
- ARETE INDUSTRIAL PARK, VAPI, GUJARAT
- ADANI MUNDRA PORT SPECIAL ECONOMIC ZONE
- BUNDELKHAND INDUSTRIAL AREA, UTTAR PRADESH
- WANDA INDUSTRIAL NEW CITY - HARYANA
- TATA GOPALPUR SEZ, ODISHA
- JINDAL STEEL SEZ, ODISHA
- AMRAVATI PLAN - NEW CAPITAL OF ANDHRA PRADESH
- GMR KRISHNAGIRI SEZ, KAKINADA SEZ
- GMR HYDERABAD INTERNATIONAL AIRPORT
- KULPI SEZ, WEST BENGAL
- DANKUNI INDUSTRIAL TOWNSHIP, WEST BENGAL
- VARAPATTI DEFENCE PARK, TAMIL NADU
- SULUR AEROSPACE PARK, TAMIL NADU

EASTERN EUROPE & CIS

RUSSIA
- TOMSK INNOVATION PARK
- PSKOV MULTIPRODUCT INDUSTRIAL SEZ
- PSKOV FOOD PARK

KAZAKHSTAN
- ALMATY HI-TECH SEZ (PIT)
- ASTANA INDUSTRIAL & INNOVATION SEZ

SOUTH AMERICA

BRAZIL
- ITAJAI INDUSTRIAL INNOVATION PARK
- REGIONAL STRUCTURAL PLAN - SANTA CATARINA

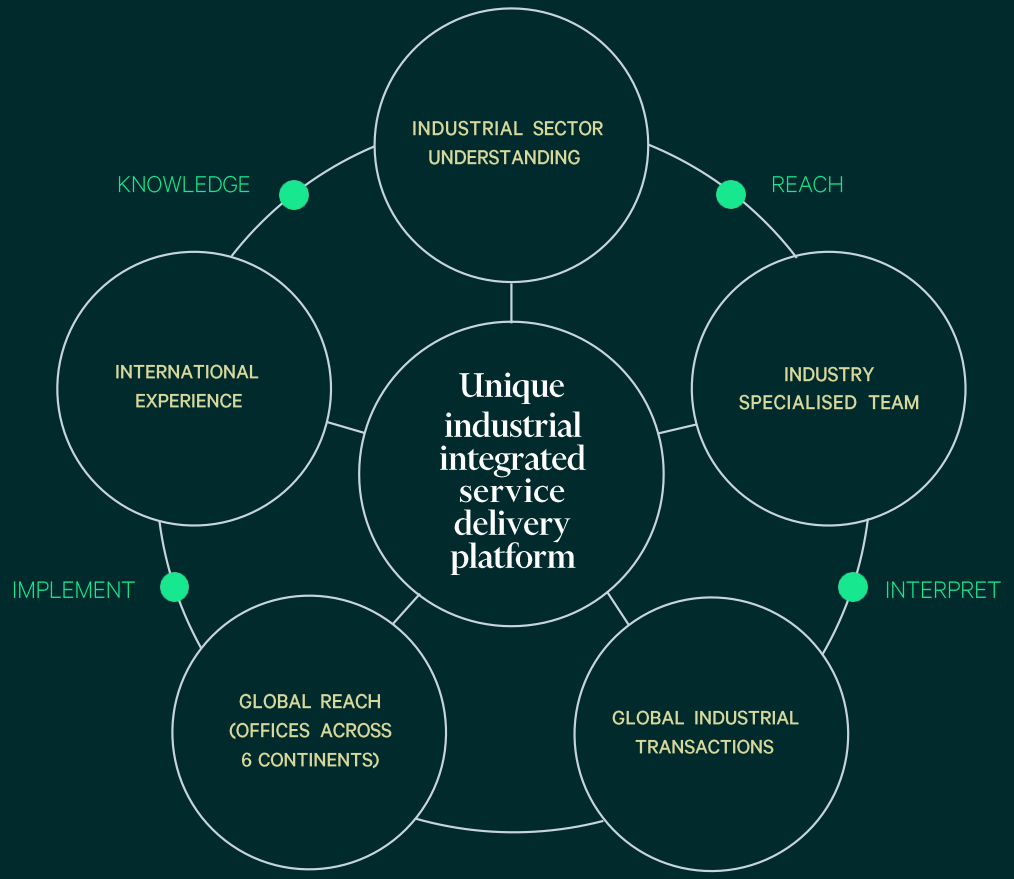
NORTH AMERICA

MEXICO
- LAZARO CARDINAS SEZ

DOMINICAN REPUBLIC
- DOMINICANA FREE ZONE

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Integrated Industrial Expertise Across Sectors



INDUSTRIAL & LOGISTICS

01
HIGH TECH PARKS & INNOVATION ZONES

02
INDUSTRIAL TOWNSHIP / ECONOMIC DEVELOPMENT OF CITIES

03
INDUSTRIAL CORRIDORS/ REGION

04
RESEARCH & DEVELOPMENT ZONE

05
PORT/AIRPORT INDUSTRIAL HUBS

06
SPECIAL ECONOMIC ZONES/ FREE ZONES

SECTORS

- Food Processing
- Energy
- Oil & Gas
- Chemical & Petrochemicals
- Pharmaceuticals
- Automotive
- Textiles
- Aerospace
- Defense
- Research & Development

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Comprehensive Service Offering



INDUSTRIAL SECTOR OPPORTUNITIES STUDY



TECHNO-ECONOMIC VALIDATION STUDY



CLUSTER DEVELOPMENT ADVISORY



ORGANIZATION AND MANAGEMENT STRUCTURING WITH GOVERNANCE



INDUSTRIAL REAL ESTATE STRATEGY



POLICY EVALUATION AND INCENTIVES STUDY



VALUATION SERVICES



MARKETING STRATEGY AND INDUSTRIAL DEVELOPER OUTREACH



FEASIBILITY AND DEVELOPMENT STRATEGY



ASSET MONETIZATION STRATEGY AND PPP STRUCTURING



INVESTMENT RISK MONITORING



INDUSTRIAL CORRIDOR DEVELOPMENT STUDIES



INDUSTRIAL VALUE / VOLUME / CARGO TRAFFIC ASSESSMENTS



LOCATION STRATEGY



PLANT AND MACHINERY VALUATION



ECONOMIC MASTER PLANNING SERVICES

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Industrial & Logistics Advisory Services

Our team collaborates across geographies & business lines to help clients with relocating, consolidating & expanding across India.

From land and built-up space for industrial & warehousing parks, manufacturing units, cold chains, Data Centres, R&D labs, F&B Kitchens and Repair & Return centres we offer a complete suite of services.

These including property marketing, landlord/tenant representation, location advisory, lease v/s buy analysis, acquisition & disposition, portfolio analysis and rent benchmarking.

The industrial investment sales team assists investors and developers with strategic advisory in terms of joint ventures & development, pre-leased asset sales, sale & lease back and forward purchase of industrial and logistics assets.



6,000+ ACRES
ACQUIRED OR DISPOSED ON BEHALF OF CLIENTS

TRANSACTIONS IN
95+ CITIES

80+ MN.SF.
LEASED ON BEHALF OF CLIENTS

47+ TRANSACTIONS
CLOSED IN 2026 H1

80+
PROFESSIONALS

Service Offering

- Ready to move in Warehouse & Industrial Lease
- Built-to-Suit Warehouse & Industrial Lease
- In-city distribution & Last Mile Delivery Centres
- Lease of Industrial Kitchens, Repair & Return Services and R&D Labs
- Land for Parking Yards
- Leasing of Cold Chain Assets
- Land for Data Centres
- Land Acquisition & Disposition for end-users
- Site Selection Advisory
- Portfolio analysis and rent benchmarking
- Acquisition of Pre-leased Industrial & Warehousing Assets
- Sale & Leaseback
- Joint Development / Joint Venture for Integrated Industrial & Logistics Parks

Track Record:

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2026 H1	**42 acres** of Land (Acquisition/disposition/lease) **~2.23 MnSF** Leased.
2025	**595 acres** of Land (Acquisition/disposition/lease) **~7.76 MnSF** Leased.
2024	**282 acres** of Land (Acquisition/disposition/lease) **~10 MnSF** Leased.
2023	**748 Acres** of Land (Acquisition/disposition/lease) **~ 10 MnSF** Leased.
2022	**445 Acres** of Land (Acquisition/disposition/lease) **~8.5 MnSF** Leased.
2021	**~296 Acres** of Land (Acquisition/disposition/lease) **~8.34 MnSF** Leased.
2020	**~192 Acres** of land (Acquisition/disposition/lease) **~7.42 MnSF** of Leased
2019	**188 Acres** of Land (Acquisition/disposition/lease) **7.7 MnSF** of Leased
2018	**261 Acres** of Land (Acquisition/disposition/lease) **5.1 MnSF** of Leased
2017	**216 Acres** of Land (Acquisition/disposition/lease) **1.4 MnSF** of Leased
2016	**216 Acres** of Land (Acquisition/disposition/lease) **1.4 MnSF** of Leased

Our Experience with Auto Sector | Leasing Services

42+ MSF

Area Transacted across Office, Industrial / Land & Retail Services

375+

Deals Closed across Office, Industrial / Land & Retail Services

220+

Unique Clients - across Office, Industrial / Land & Retail Services

225+

Office, R&D And Training Centre Transactions Closed

130+

Clients Serviced Across Asset Classes

900+ Acres

Industrial Land Transacted (Acquisition + Disposition)

130+

Manufacturing & Assembly Facilities Leased

22+

Experience Centers & Retail Dealerships

18+

BTS Office Transactions

**Figures reflect transactions closed between Q1 2020 and Q2 2026.*

CBRE Automotive Solutions

Integrated

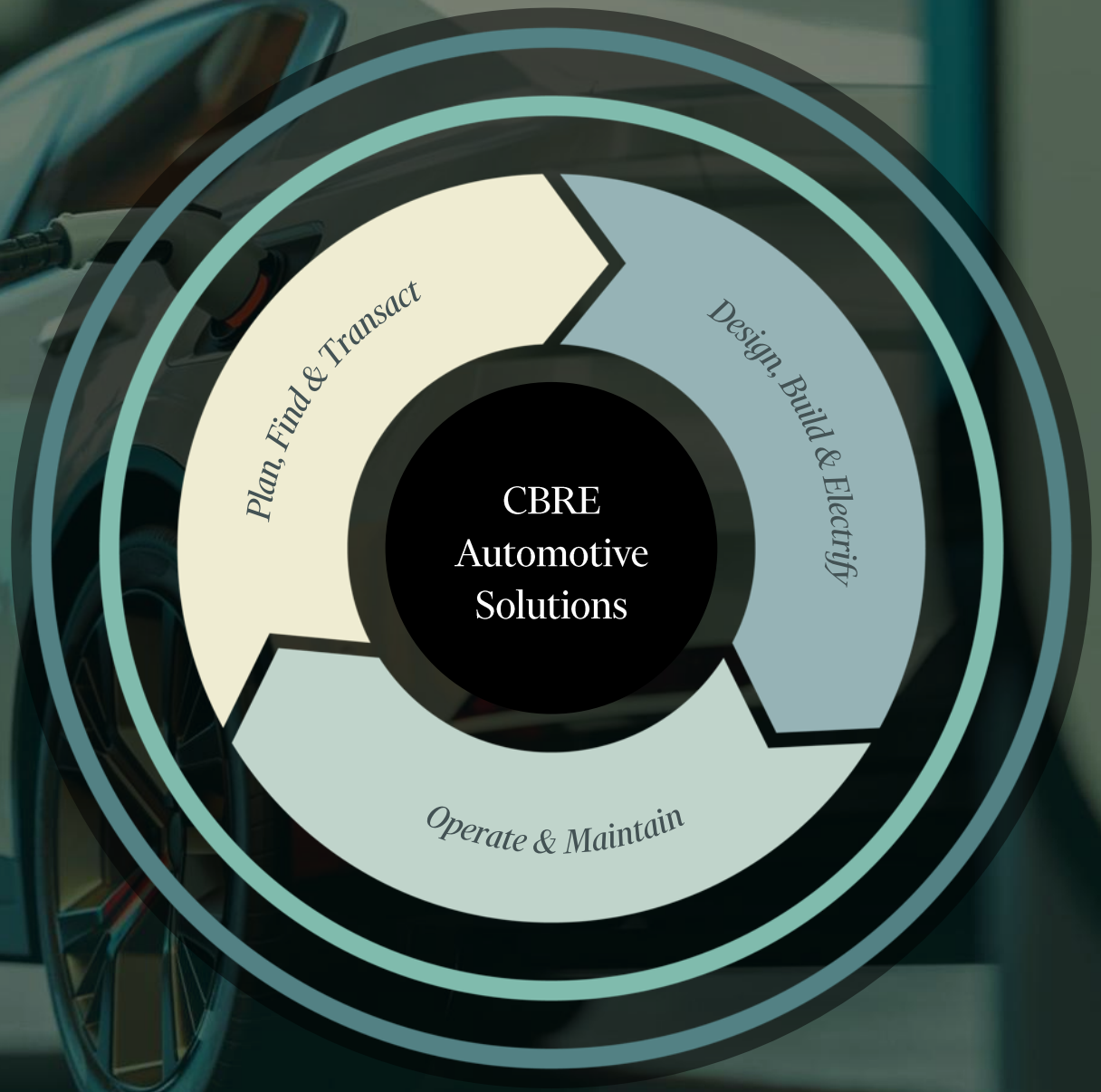
End-to-end Automotive lifecycle management

Reliable

Delivering at pace and on budget with superior uptime

Consistent

Globally consistent and programmatic wherever you are



Land & Manufacturing facility

Distribution Centres

Office Headquarters & Zonal Office

R&D & Learning Centres

Retail Dealerships & Experience Centres

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