

Asia-Pacific Real Estate Brokerage - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-04-28 | 190 pages | Mordor Intelligence

AVAILABLE LICENSES:

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

Report description:

The Asia-Pacific Real Estate Brokerage Market size is estimated at USD 383.92 billion in 2025, and is expected to reach USD 471.83 billion by 2030, at a CAGR of 4.21% during the forecast period (2025-2030).

Key Highlights

- The real estate brokerage market in Asia-Pacific is mainly driven by a surge in urbanization and foreign investment. Urbanization remains a dominant megatrend in the region. Asia hosts over half of the world's urban population, exceeding 2.2 billion people. Projections indicate that by 2050, Asia's urban populace will increase by 50%, adding another 1.2 billion residents.
- Cities across Asia and the Pacific are in charge of global economic opportunities and sustainability endeavors. While they grapple with challenges like environmental degradation, escalating disasters, persistent slums, and social exclusion, they also stand as economic powerhouses, centers of innovation, and champions of cultural heritage preservation.
- Currently, office and retail real estate make up a significant portion of the Asia-Pacific investor portfolio, accounting for a third. However, this landscape is poised for a significant shift. While service sectors, notably hotels and retail, bore the brunt of the COVID-19 pandemic, industrial real estate, especially logistics and distribution centers, recovered soon and witnessed growth, with further expansion on the horizon. Consequently, there is a notable pivot in real estate asset allocation, with a tilt from retail toward industrial properties.
- Historically, office real estate grappled with high vacancy rates, prompting some to pivot toward residential offerings. Yet, there is a glimmer of optimism for 2024, especially in major urban centers where office rentals are projected to rise.
- Investors are increasingly turning their gaze toward niche real estate segments. Data centers, in particular, have garnered significant attention. Notably, Tokyo and Shanghai are the leaders in live data center capacities in the Asia-Pacific region. Another emerging star in the real estate market is the life sciences sector, encompassing a diverse array of medical facilities and properties.

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scott-international.com

www.scott-international.com

Asia-Pacific Real Estate Brokerage Market Trends

Demand for Residential Segment Driving the Market

- In India, Delhi NCR saw a record-breaking quarter in 2024, with 5,109 high-end housing units sold. Gurgaon dominated the sales, accounting for 79% of the total. The completion of the Dwarka Expressway in Gurgaon played a pivotal role in driving this heightened demand, extending its impact across the city's major corridors.
- New launches in Gurgaon experienced overwhelming demand, with most projects selling out within days. Notably, DLF's Sector 77 project was fully booked within two days of its pre-launch, while Signature Global's Sector 37D project was oversubscribed by 5.4 times during its pre-launch phase. Noida and Delhi also made significant contributions to the high-end sales landscape.
- In Bangkok, market sentiment is on the rise, as highlighted by presales rates exceeding 50% for recent launches. Overall sales have seen a notable uptick, climbing by 20 basis points. Notably, two projects achieved a sell-out in the quarter, nudging the unsold rate down to 3.2%.
- The influx of international buyers is on the rise, helping to offset the limited purchasing power of local buyers. Apartment rental demand is rebounding, driven by a 12% year-on-year increase in tourist arrivals and expats in the first quarter. While the completion of Junit renovations in various projects pushed the vacancy rate to 5.0% in 2024, this growth is viewed as a transient blip, given the robust rental demand.

India Emerging as a Prominent Player with Rising Real Estate Demand

- In Mumbai, homebuyer preferences for spacious homes propelled sales in the high-end category to a new peak. Notably, industrialists, HNIs, C-suites, and entertainment celebrities gravitated toward high-ticket apartments in prime locales like Malabar Hill, Worli, and Bandra.
- Thane emerged as the dominant player, commanding a 21.8% share of the high-end sales, closely trailed by Western Suburbs II and Navi Mumbai. South Central Mumbai and Western Suburbs II witnessed unprecedented sales surges. Noteworthy launches like MCL Aaradhya Awaan in Prime South and Godrej Vistas in the Eastern Suburbs further bolstered these sales.
- Chennai's luxury housing sector saw a remarkable 141% surge in sales from the previous quarter, with hotspots like Kilpauk, Kotturpuram, and Vadapalani, situated in the Central and Off Central submarkets, witnessing heightened activity. Year-on-year, the city's total unit sales also climbed by 25%. This surge in Chennai's luxury housing market is attributed to rising demand for bespoke offerings, global design aesthetics, and top-tier amenities, which resonate with the discerning clientele.

Asia-Pacific Real Estate Brokerage Industry Overview

The Asia-Pacific real estate brokerage market is fragmented in nature. It witnesses a blend of local, regional, and global participants. Market concentration, however, can vary notably, not just between countries but even within cities. Factors shaping this concentration encompass the count of brokerage firms, their market shares, the competitive landscape, regulatory frameworks, and technological strides.

The key players in the market include CBRE Group, JLL, Colliers International, Knight Frank, Savills, etc.

Additional Benefits:

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

Table of Contents:

1 INTRODUCTION

- 1.1 Study Assumptions
- 1.2 Scope of the Study

2 RESEARCH METHODOLOGY

- 2.1 Analysis Methodology
- 2.2 Research Phases

3 EXECUTIVE SUMMARY

4 MARKET DYNAMICS AND INSIGHTS

- 4.1 Current Market Scenario
- 4.2 Market Dynamics
 - 4.2.1 Drivers
 - 4.2.1.1 Increasing Urbanization Driving the Market
 - 4.2.1.2 Regulatory Environment Driving the Market
 - 4.2.2 Restraints
 - 4.2.2.1 Market Saturation Restraining the Market
 - 4.2.2.2 Interest Rate Fluctuations Restraining the Market
 - 4.2.3 Opportunities
 - 4.2.3.1 Technological Advancements Driving the Market
- 4.3 Value Chain/Supply Chain Analysis
- 4.4 Government Regulations, Trade Agreements, and Initiatives
- 4.5 Industry Attractiveness - Porter's Five Forces Analysis
 - 4.5.1 Bargaining Power of Suppliers
 - 4.5.2 Bargaining Power of Consumers
 - 4.5.3 Threat of New Entrants
 - 4.5.4 Threat of Substitute Products
 - 4.5.5 Intensity of Competitive Rivalry
- 4.6 Impact of COVID-19 on the Market

5 MARKET SEGMENTATION

- 5.1 By Type
 - 5.1.1 Residential
 - 5.1.2 Non-Residential
- 5.2 By Service
 - 5.2.1 Sales
 - 5.2.2 Rental
- 5.3 By Geography
 - 5.3.1 China
 - 5.3.2 India
 - 5.3.3 Japan

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 5.3.4 Australia
- 5.3.5 South Korea
- 5.3.6 Southeast Asia
- 5.3.7 Rest of Asia-Pacific

6 COMPETITIVE LANDSCAPE

- 6.1 Market Concentration Overview
- 6.2 Company Profiles
 - 6.2.1 CBRE Group
 - 6.2.2 JLL
 - 6.2.3 Colliers International
 - 6.2.4 Knight Frank
 - 6.2.5 Savills
 - 6.2.6 Cushman & Wakefield
 - 6.2.7 Century 21 Real Estate
 - 6.2.8 ERA Real Estate
 - 6.2.9 RE/MAX
 - 6.2.10 Coldwell Banker*
- 6.3 Other Companies

7 FUTURE OF THE MARKET

8 APPENDIX

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Asia-Pacific Real Estate Brokerage - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-04-28 | 190 pages | Mordor Intelligence

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User License	\$4750.00
	Team License (1-7 Users)	\$5250.00
	Site License	\$6500.00
	Corporate License	\$8750.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-03-02"/>
		Signature	

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

