



City Snapshot

LAUNCHES

11,100 Units

8% Quarterly Change

SALES

11,050 Units

9% Quarterly Change

AVAILABLE INVENTORY

98,000 Units

Nil Quarterly Change

AVERAGE QUOTED BASE SELLING PRICE

₹ 7,645 /sf

Note: Basic selling price on BUA

A Bird's Eye View

Hyderabad Key Micro-markets	RENTAL VALUES		CAPITAL VALUES		OUTLOOK Short-term
	Avg. Quoted Rent (₹/month)	Quarterly Change (%)	Avg. Quoted Rate (₹/sf)	Quarterly Change (%)	
Gachibowli	30,500-43,000	1%	9,600	1%	↑
Kondapur	27,500-34,000	0%	9,300	1%	↑
Miyapur	20,500-28,000	0%	7,100	1%	↑
LB Nagar	14,000-18,000	0%	7,200	1%	↑
Adibatla	14,500-19,500	1%	4,900	1%	↑

Zonal Classification

Central	Ameerpet Punjagutta Somajiguda Himayatnagar Kachiguda Khairatabad
North	Miyapur Pocharam Bachupally Nizampet Bollaram Yepral Shamirpet
South	Shamshabad Adibatla Maheshwaram Shadnagar Rajendranagar Srisaillam Highway
East	LB Nagar Nagole Uppal Habsiguda Ghatkesar Nacharam Peerzadiguda Vanasthalipuram
West	Gachibowli Kondapur Tellapur Manikonda Kukatpalli Attapur Kokapet Patancheru Madhapur Appa Junction

↑	INCREASE
▢	STABLE
↓	DECREASE

Note: Rounding may result in minor variations between the stated and calculated values.

Average Quoted Rent for 2 BHK apartment measuring 1,000 sf; Average Quoted Rate (Base Price) on Built-up Area (BUA)

Key Project Launches

Prestige Spring heights

Prestige Group
Rajendra Nagar
1,656 units
₹ 8,980/sf

GHR The Cascades Neopolis

GHR Infra
Kokapet
1,189 units
₹ 9,999/sf

ASBL Broadway

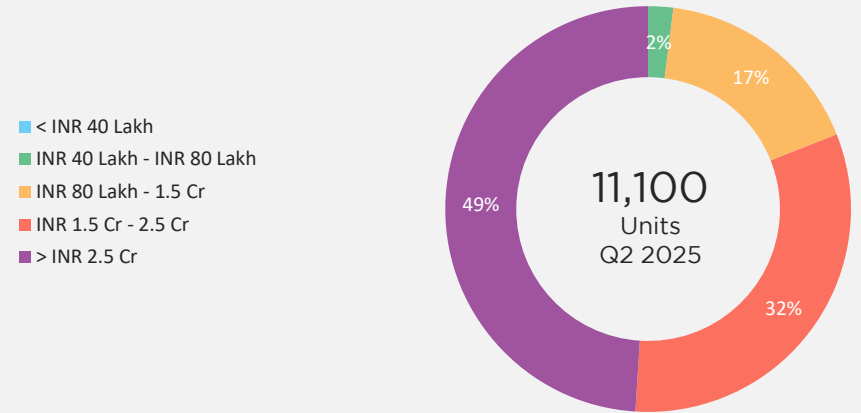
ASBL Group
Puppalguda
885 units
₹ 8,999/sf

Above average basic selling prices are quoted on Built-up Area

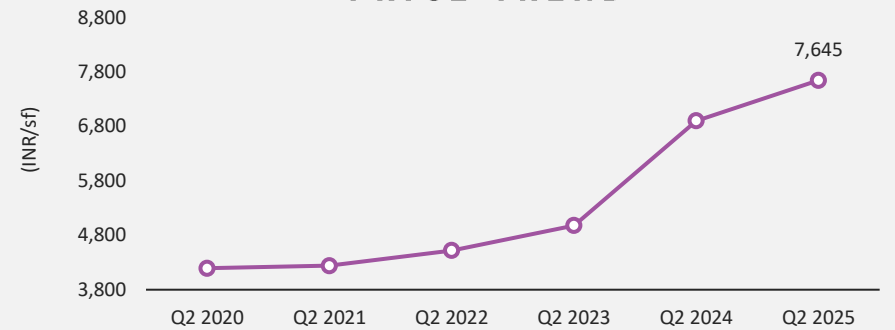
DEMAND SUPPLY DYNAMICS



SUPPLY BUDGET-SEGMENTATION



PRICE TREND



Average Quoted Rent for 2 BHK apartment measuring 700 sf; Average Quoted Rate (Base Price) on Built-up Area (BUA)
Available inventory includes units from projects that are launched but yet not sold, despite the launch timelines and construction progress

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Hyderabad Q2 2025

Launches

Luxury Leads as Hyderabad Adjusts Launch Pace in Q2 2025

Hyderabad recorded the launch of approximately 11,100 residential units in Q2 2025, accounting for 11% of the total new supply across the top seven Indian cities. While the city witnessed an 8% increase in new launches on a quarter-on-quarter basis—indicating sustained developer momentum—the annual comparison reflected a 19% decline in supply. This contrast suggests a cautious recalibration in launch activity relative to the elevated levels seen in the same period last year.

West Hyderabad retained its lead, accounting for 68% of new residential launches, though the zone witnessed a 10% dip in quarterly supply. Meanwhile, South Hyderabad saw strong momentum, with notable sequential increases also recorded in East and North. Central Hyderabad remained inactive during the quarter. Notably, luxury and ultra-luxury segments together accounted for a substantial 81% of the total launches in the city, underscoring developers' continued focus on premium offerings and the sustained appetite among high-end buyers.

Sales Trend

Steady Recovery in Hyderabad Residential Sales Signals Renewed Buyer Confidence

Hyderabad's residential market accounted for 11% of the total housing sales across the top seven Indian cities in Q2 2025, with approximately 11,050 units sold. The city registered a 9% sequential increase, suggesting improving momentum following a subdued previous quarter. However, on a year-on-year basis, sales declined by 27%, highlighting a continued gap from the levels seen in Q2 2024.

West Hyderabad remained the most active zone, contributing 54% to the overall sales, followed by North at 26% and South at 14%. While all major zones recorded quarter-on-quarter growth—led by South Hyderabad's 25% increase—year-on-year performance was muted mainly, with North and South witnessing notable declines of 42% and 31%, respectively. Central Hyderabad continued to see minimal activity, comprising just 1% of sales and registering declines on both quarterly and annual fronts.

Available Inventory

Hyderabad Maintains Stable Inventory Levels, Premium Supply Continues to Lead

As of Q2 2025, Hyderabad's available residential inventory stood at approximately 98,000 units, maintaining its position as the second-largest market among India's top seven cities. The city continued to represent 17% of the total pan-India unsold stock, with inventory levels remaining largely stable compared to the previous quarter.

Geographically, West Hyderabad accounted for the highest share at 63%, followed by North at 22% and South at 10%. East and Central Hyderabad made up a smaller portion, with Central contributing the least. From a budget standpoint, the high-end segment formed the bulk of the unsold inventory at 48%. In comparison, ultra-luxury and luxury collectively accounted for 35%, suggesting sustained focus on premium supply tiers.

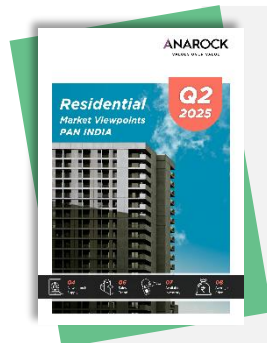
Hyderabad's inventory overhang in Q2 2025 increased slightly by two months to 26 months, reflecting a balanced market adjusting to steady supply and demand dynamics.



Outlook

Hyderabad's residential market is progressing with steady resilience, characterized by a healthy balance between new launches and buyer absorption. Developers are maintaining a strategic focus on premium segments, while improving market sentiment and accessible financing are drawing more homebuyers back into action.

The city's competitive pricing compared to other major metros, coupled with growing end-user confidence, positions it well for sustained progress. As demand broadens across both geographies and price bands, Hyderabad's residential outlook for the remainder of 2025 remains firmly optimistic, anchored in solid market fundamentals.



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Budget Segmentation

Affordable	< ₹ 40 Lakh
Mid-end	₹ 40 Lakh - ₹ 80 Lakh
High-end	₹ 80 Lakh - ₹ 1.5 Cr
Luxury	₹ 1.5 Cr - ₹ 2.5 Cr
Ultra-luxury	> ₹ 2.5 Cr

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