Residential Market Viewpoints

Bengaluru Q1 2026

ANAROCK
VALUES OVER VALUE

City Snapshot

LAUNCHES
24,400 Units
7% Quarterly Change

SALES
16,450 Units
-5% Quarterly Change

AVAILABLE INVENTORY
72,800 Units
12% Quarterly Change

AVERAGE QUOTED BASE SELLING PRICE
₹ 9,310 /sf

A Bird's Eye View

Bengaluru Key Micro-markets	RENTAL VALUES Avg. Quoted Rent (₹/month)	RENTAL VALUES Quarterly Change (%)	CAPITAL VALUES Avg. Quoted Rate (₹/sf)	CAPITAL VALUES Quarterly Change (%)	OUTLOOK Short-term
Electronic City	20,000-31,000	1%	7,200	1%	
Whitefield	30,000-45,000	1%	10,680	2%	
Sarjapur Road	33,000-46,000	1%	11,400	2%	
Thanisandra Main Road	28,000-42,000	1%	10,100	1%	
Mysore Road	20,000-26,000	1%	7,870	2%	

Zonal Classification

Central	Chamrajpet | Frazer Town | Richmond Road | Ulsoor | Shanti Nagar
North	Hebbal | Yelahanka | Jalahalli | Thanisandra Main Road | Hennur Road | Doddaballapur Road | International Airport Road
South	Begur Rd | JP Nagar | Electronic City | Hosur Road | Bannerghatta Road | Kanakapura Road | Koramangala
East	Whitefield | KR Puram | Sarjapur Road | Harlur Road | Marathahalli | Varthur Road | Bellandur | Old Madras Road
West	Tumkur Road | Magadi Road | Mysore Road | Rajaji Nagar | Naagarabhaavi | Vijay Nagar | Nelamanagala

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

Puravankara Northern Lights
Puravankara Limited
Bagalur
2,673 units
₹ 10,850/sqft

Sattva City
Sattva Group
Chikkajala
2,477 units
₹ 12,000/sqft

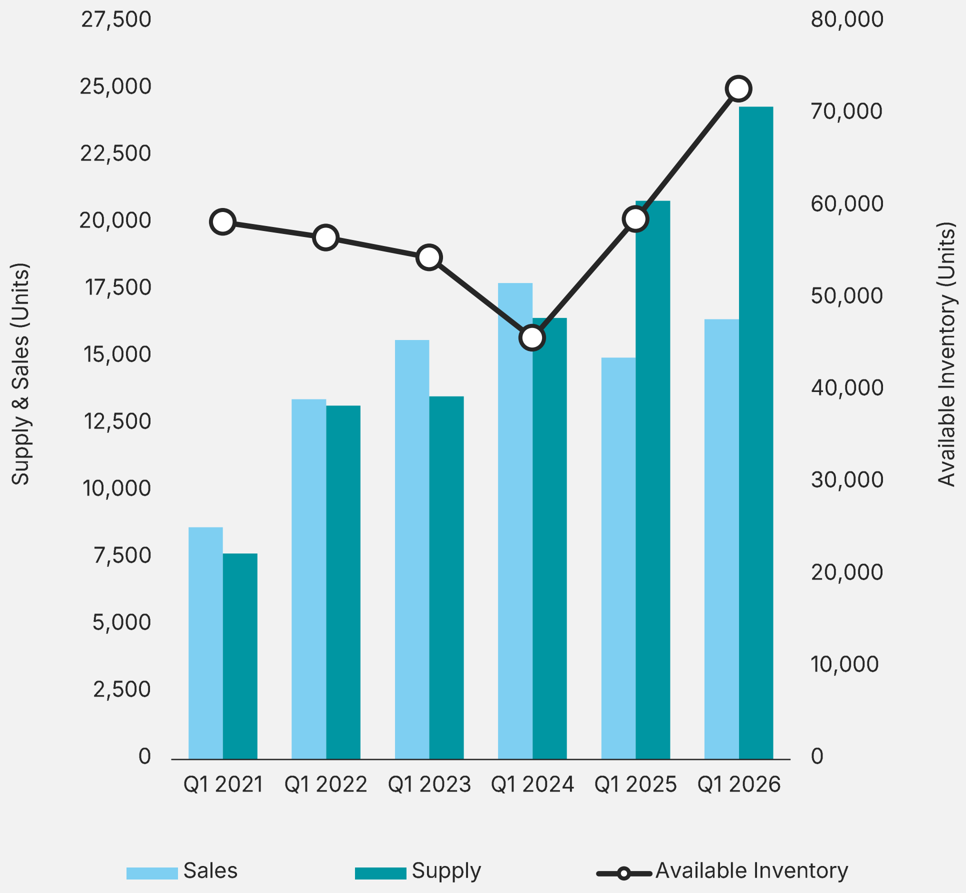
Prestige Raintree Park Evergreen
Prestige Group
Varthur
2,000 units
₹ 13,500/sqft

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

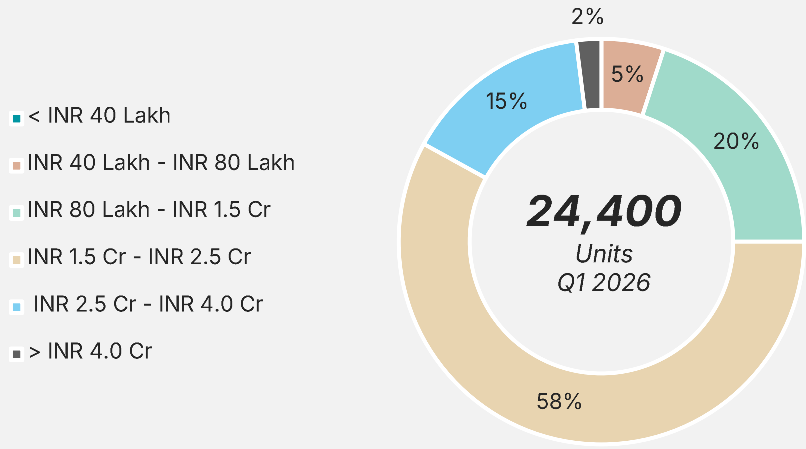
Residential Market Viewpoints

Bengaluru Q1 2026

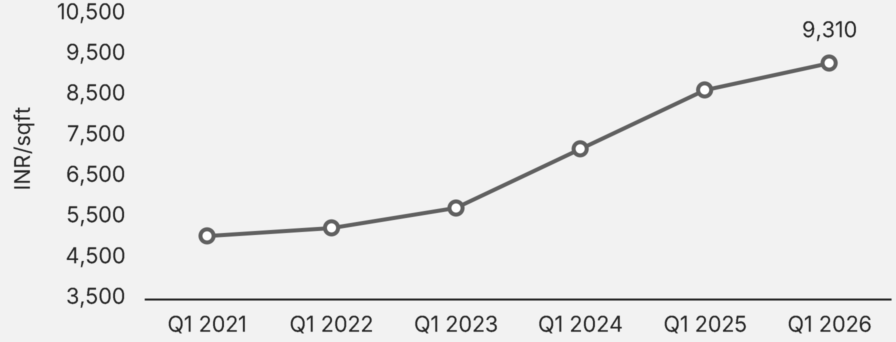
DEMAND SUPPLY DYNAMICS



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

Residential Market Viewpoints

Bengaluru Q1 2026

Launches

High-end housing continues to fuel Bengaluru's steady launch growth

Bengaluru accounted for around 19% of new residential launches across India's top seven cities, with approximately 24,400 units launched during the quarter, making it the second-highest contributor after MMR. Launch activity recorded a 7% increase from the previous quarter and a 17% rise year-on-year, reflecting steady supply expansion supported by sustained end-user demand and continued developer confidence.

Launch activity in Bengaluru was largely driven by East Bengaluru, which accounted for a 54% share of the total supply, recording a 7% increase quarterly and 51% annually. North Bengaluru followed with a 34% share, witnessing a strong 37% quarterly growth alongside a 13% annual rise. South Bengaluru contributed around 8%, reflecting a notable decline of nearly half on both quarterly and yearly bases. West Bengaluru, though a smaller 4% share, saw a 32% quarterly uptick in launches.

In terms of budget segmentation, launch activity remained heavily skewed toward the high-end segment, which accounted for a dominant 58% of the total supply, followed by the upper-mid segment with a 20% share. The shift toward structured community living with access to shared amenities and better infrastructure continues to influence supply, with strong traction in the upper-mid and high-end segments.

Sales Trend

Bengaluru housing sales hold firm with 10% annual growth

Bengaluru accounted for around 16% of total residential sales across India's top seven cities, with approximately 16,450 units sold during the quarter. Sales activity witnessed a 5% quarterly decline while recording a 10% year-on-year growth, indicating steady demand despite short-term moderation in absorption levels.

Sales distribution in Bengaluru was led by East Bengaluru, which accounted for a dominant 47% share of total absorption, followed by North Bengaluru at 33%, reflecting strong traction across these key corridors. South Bengaluru contributed around 17%, while West Bengaluru held relatively smaller share at 3%.

Available Inventory

Rising inventory in Bengaluru reflects active supply pipeline

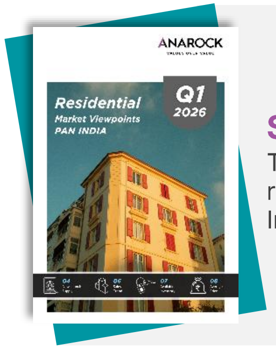
Bengaluru accounted for around 12% of total available residential inventory across India's top seven cities, with approximately 72,800 units in stock. Inventory levels witnessed a notable 12% increase quarter-on-quarter and a 24% rise year-on-year, reflecting a steady expansion in supply driven by strong developer confidence, ongoing project additions, and sustained end-user demand.

Available Inventory distribution in Bengaluru was largely concentrated in East Bengaluru, which accounted for a dominant 50% of total stock, reflecting its position as a key launch hotspot in recent quarters, followed by North Bengaluru at 30%, indicating a significant share of supply across these key corridors. South Bengaluru contributed around 16%, while West Bengaluru held a smaller 4% share, with Central Bengaluru remaining negligible in overall inventory contribution.

The inventory overhang in the city stood at 14 months, reflecting a marginal increase by 1 month and indicating a largely demand-aligned and balanced market environment.

Outlook

As Q1 2026 concludes, Bengaluru's residential market fundamentals remain robust, supported by strong end-user demand, a robust employment base, and increasing GCC concentration in the city. The market is expected to maintain a stable growth trajectory over the coming quarters, further aided by ongoing infrastructure upgrades. Key micro-markets in the East and North Bengaluru are likely to remain primary growth drivers, benefitting from proximity to major IT-ITeS hubs, metro expansions, and improved connectivity.



Scan the QR code
To read our latest research reports and insights on India Real Estate

Budget Segmentation:
Affordable: < INR 40 Lakh
Lower Mid: INR 40 Lakh - INR 80 Lakh
Upper Mid: INR 80 Lakh - INR 1.5 Cr
High-end: INR 1.5 Cr - INR 2.5 Cr
Luxury: INR 2.5 Cr - INR 4 Cr
Ultra-Luxury: > INR 4 Cr

Authors
Abhai Mani Chaturvedi Sr.Vice President, Research & Advisory
Sumeet Singh Negi Vice President, Research & Advisory
Meruga Pallavi Manager, Research & Advisory

Editor
Priyanka Kapoor Sr.Vice President, Research & Advisory

For research services, contact:
Dr. Prashant Thakur
Executive Director and Head of Research & Advisory
prashant.thakur@anarock.com

ANAROCK Property Consultants Pvt. Ltd.
1002, 10th Floor, B Wing, ONE BKC, Plot No. C-66, G Block Bandra Kurla Complex,
Mumbai - 400 051

MahaRERA Registration No. A51900000108 available at
http://maharera.mahaonline.gov.in