Residential Market Viewpoints

Bengaluru Q2 2026

City Snapshot

LAUNCHES	SALES	AVAILABLE INVENTORY	AVERAGE QUOTED BASE SELLING PRICE
21,700 Units	15,300 Units	79,200 Units	₹ 9,450 /sf
-11% Quarterly Change	-7% Quarterly Change	9% Quarterly Change	

A Bird's Eye View

Bengaluru	RENTAL VALUES		CAPITAL VALUES		OUTLOOK
Key Micro-markets	Avg. Quoted Rent (₹/month)	Quarterly Change (%)	Avg. Quoted Rate (₹/sf)	Quarterly Change (%)	Short-term
Electronic City	20,000-31,000	0%	7,450	3%	
Whitefield	30,000-46,000	1%	10,850	2%	
Sarjapur Road	33,000-46,500	1%	11,560	1%	
Thanisandra Main Road	28,000-42,000	0%	10,300	2%	
Mysore Road	20,000-26,000	0%	8,040	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 Super Built-up Area (SBUA)

Key Project Launches

Sobha One Residences
Shobha Ltd
Hoskote
3,484 units
₹ 13,500/sqft

Godrej Vanantara
Godrej Properties
Bannerghatta Road
2,008 units
₹ 12,000/sqft

Aparna Wonderwoods
Aparna Construction
Off Kanakapura Road
1,261 units
₹ 9,700/sqft

Above average basic selling prices are quoted on Saleable Area

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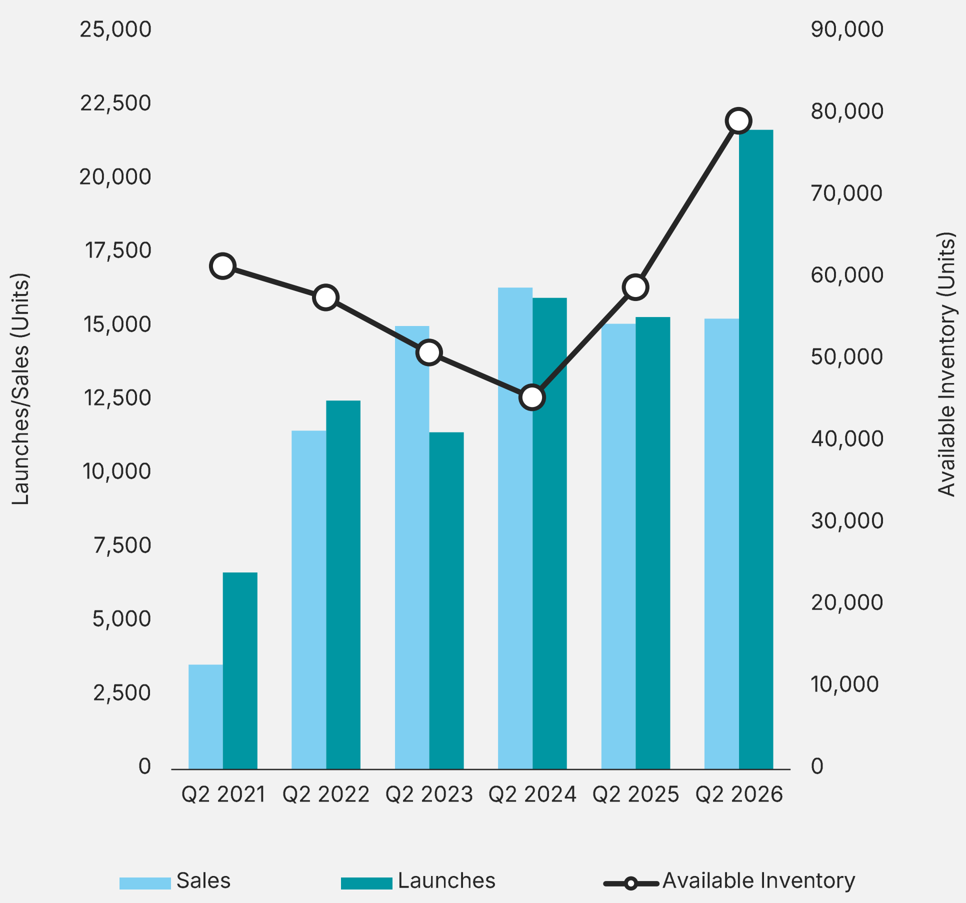
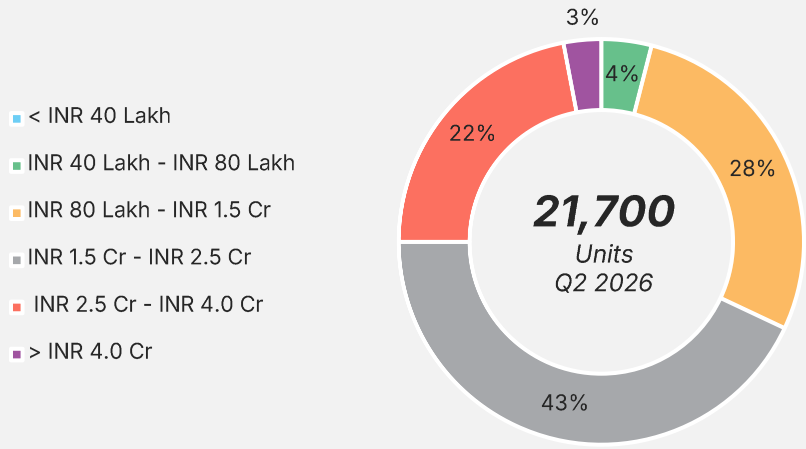
ANAROCK
VALUES OVER VALUE

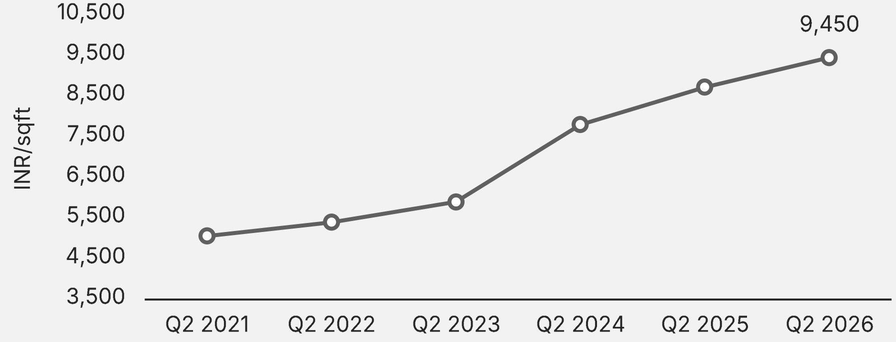
DEMAND SUPPLY DYNAMICS



SUPPLY BUDGET-SEGMENTATION



PRICE TREND



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

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Launches

1 in 4 new residential units launched in Q2 2026 were in the luxury segment in Bengaluru

Accounting for over 20% of new residential launches across India's top seven cities, Bengaluru remained the second-largest market after MMR, with approximately 21,700 units launched in Q2 2026. Although launches declined 11% quarter-on-quarter, they registered a 42% year-on-year increase, reflecting healthy supply momentum.

East Bengaluru and South Bengaluru remained the city's dominant residential supply hubs in Q2 2026, together accounting for 71% of total new launches. East Bengaluru led with a 43% share despite a 29% quarter-on-quarter decline, while recording a robust 114% year-on-year increase, reflecting sustained long-term developer confidence. South Bengaluru accounted for 28% of total new launches, with 204% quarter-on-quarter growth and a 27% year-on-year increase. North Bengaluru remained a key contributor to the city's new launch supply, with supply moderating on a quarterly basis but remaining higher than the previous year. West Bengaluru witnessed a quarter-on-quarter increase in launch supply, although launches remained slightly lower compared to the previous year.

In terms of budget segmentation, new launch supply was primarily concentrated in the high-end segment, which accounted for 43% of the total supply, followed by the upper-mid segment with a 28% share.

Sales Trend

South Bengaluru is the only zone to register growth in housing sales both QoQ and YoY

With approximately 15,300 units sold during Q2 2026, Bengaluru accounted for nearly 17% of total residential sales across India's top seven cities. While sales posted a modest 1% year-on-year growth, they declined by 7% on a quarter-on-quarter basis, reflecting a temporary slowdown.

Sales distribution in Bengaluru was led by East Bengaluru, which accounted for a dominant 44% share of total absorption despite a 12% quarter-on-quarter decline, while recording a 5% year-on-year increase in sales. North Bengaluru followed with a 31% share, witnessing a decline in sales both quarter-on-quarter and year-on-year.

South Bengaluru continued to witness steady demand, with an increase in sales both quarter-on-quarter and year-on-year, while West Bengaluru accounted for a relatively smaller share of sales, with sales increasing quarter-on-quarter despite year-on-year decline.

Available Inventory

Bengaluru records the highest YoY rise in the available inventory in Q2 2026

By the end of Q2 2026, Bengaluru's available inventory increased by 34% year-on-year (YoY) and 9% quarter-on-quarter (QoQ), indicating a steady expansion in the housing stock. The city accounted for approximately 13% of the total available inventory across India's top seven cities, with nearly 79,200 units available for sale.

The distribution of unsold stock in Bengaluru was largely concentrated in the East, which accounted for a dominant 49% of total available units, followed by the North at 28%—reflecting a significant influx of new supply in these zones. South Bengaluru also contributed a substantial share, recording both YoY and QoQ growth. Meanwhile, West Bengaluru held a smaller portion of the market but still saw inventory increase across both timeframes.

Bengaluru's residential inventory overhang stood at approximately 15 months, increasing marginally by one month compared to the previous quarter. Despite this slight rise, the overhang remains within a healthy range, indicating that supply continues to be broadly aligned with market demand..

Outlook

Bengaluru's residential market is set to sustain its growth momentum, underpinned by infrastructure expansion, new commercial developments, and rising investment across the IT and GCC ecosystem. North Bengaluru is emerging as a standout growth corridor, anchored by AXISCADES' proposed INR 6,000 Cr aerospace, defence, and AI hub, the 1.33 million sqft GCC-focused IT Park planned within Devanahalli ITIR, and Brigade Group's 75-acre WTC-led mixed-use township integrating industrial, commercial, and residential space. Complementing these are major connectivity upgrades — Namma Metro Phases 2 and 3, PRR, STRR, and Bengaluru Suburban Rail — collectively strengthening employment access and strengthening robust residential demand citywide.

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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

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