

City Snapshot

| | | | |
|-----------------------|---------------------|----------------------|--------------------------------------|
| LAUNCHES | SALES | AVAILABLE INVENTORY | AVERAGE QUOTED BASE SELLING PRICE |
| 15,350 Units | 15,100 Units | 58,900 Units | ₹ 8,720 /sf |
| -26% Quarterly Change | 1% Quarterly Change | Nil Quarterly Change | |

Note: Basic selling price on BUA



A Bird’s Eye View

| Bengaluru Key Micro-markets | RENTAL VALUES | | CAPITAL VALUES | | OUTLOOK Short-term |
|--------------------------------|-------------------------------|-------------------------|----------------------------|-------------------------|-----------------------|
| | Avg. Quoted Rent (₹/month) | Quarterly Change (%) | Avg. Quoted Rate (₹/sf) | Quarterly Change (%) | |
| Electronic City | 20,000-30,000 | 0% | 6,850 | 1% | ▲ |
| Whitefield | 29,500-43,000 | 1% | 9,950 | 3% | ▲ |
| Sarjapur Road | 31,000-46,000 | 2% | 10,800 | 3% | ▲ |
| Thanisandra Main Road | 27,000-41,000 | 1% | 9,500 | 3% | ▲ |
| Mysore Road | 19,500-26,000 | 1% | 7,450 | 1% | ▲ |

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

Prestige Southern Star

Prestige Group
Akshaya Nagar
2,130 units
₹ 11,500/sf

Godrej MSR City Barca

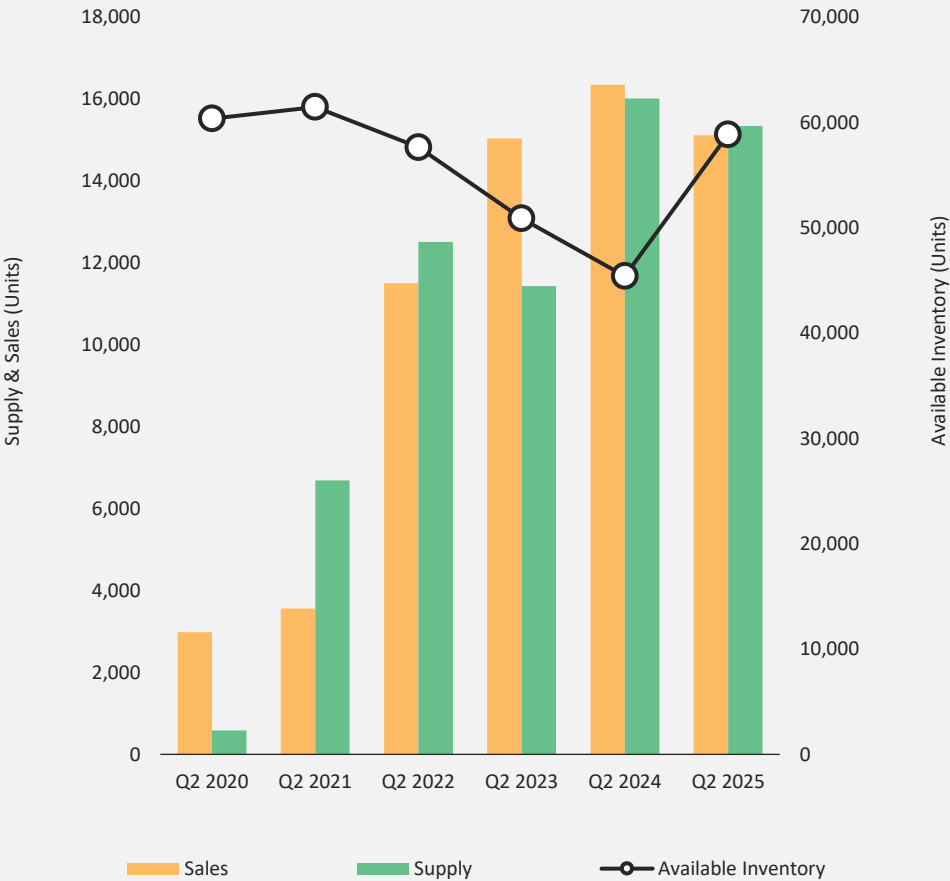
Godrej Properties
Shettigere
1,961 units
₹ 10,999/sf

Sattva Vasanta Skye

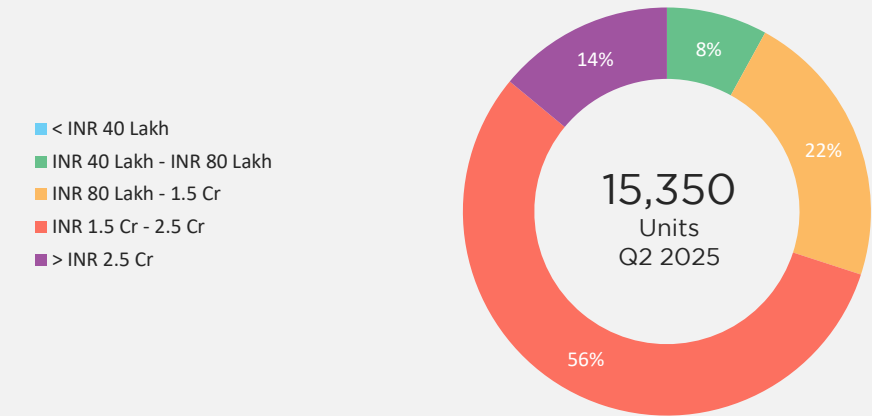
Sattva Group
Devanahalli
1,077 units
₹ 11,000/sf

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

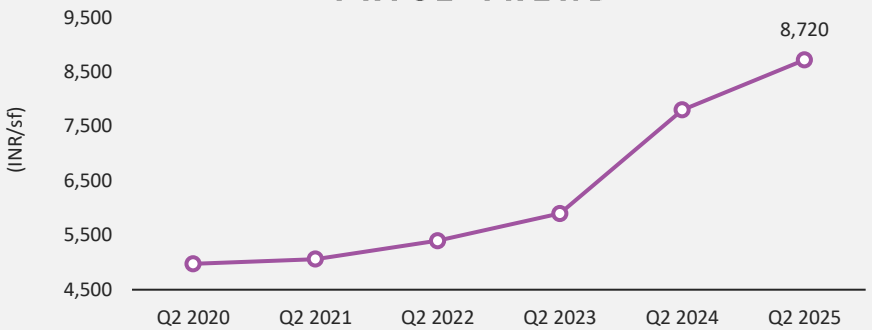
DEMAND SUPPLY DYNAMICS



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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Bengaluru Q2 2025

Launches

Luxury housing led the way in Bengaluru's new launches during Q2 2025.

Bengaluru emerged as the third-largest contributor to new housing supply among the top 7 Indian metropolitan cities, accounting for 16% of the overall launches. Despite this notable share, the city witnessed a sharp quarter-on-quarter contraction of 26% in new residential launches compared to Q1 2025, alongside a 4% dip when measured against Q2 2024 levels. Within the city, South and North Bengaluru jointly dominated the market, collectively contributing 31% of the launches. However, their performance varied, with South Bengaluru recording a 16% quarter-on-quarter increase in supply, while North Bengaluru saw a significant 37% decline. Meanwhile, East Bengaluru, which comprised 28% of the new supply, registered the steepest quarterly fall, with a notable 50% drop in fresh residential inventory.

In terms of budget segmentation, luxury housing dominated the new supply in Q2 2025, comprising 56% of total launches. High-end projects followed with a 22% share, while the ultra-luxury segment accounted for 14% of the supply. The mid-end category contributed 8%, while there were no launches in the affordable segment.

Sales Trend

Bengaluru Residential Sales Show Mixed Trends in Q2 2025

In Q2 2025, Bengaluru recorded sales of approximately 15,100 residential units, accounting for 16% of the total housing absorption across the top seven Indian cities. The market exhibited marginal improvement quarterly, with a 1% increase in sales compared to Q1 2025. However, on a year-on-year basis, the city witnessed an 8% decline in absorption levels, indicating a tempered buyer sentiment relative to the same period in 2024.

In Q2 2025, East Bengaluru continued to account for the largest share of the city's residential sales, contributing 42% to the overall absorption. However, the zone witnessed a sharp 11% decline quarterly and a significant 28% drop year-on-year. In contrast, North Bengaluru gained momentum, representing 32% of the city's sales with a 10% increase over the previous quarter and a 16% rise compared to Q2 2024. South Bengaluru followed with a 20% share, also registering positive movement both quarterly and annually, with sales improving by 9% on both counts.

Available Inventory

Q2 2025: Bengaluru's Unsold Housing Inventory Grows Amid Premium Segment Dominance

Bengaluru's residential real estate market had an estimated unsold inventory of approximately 58,900 units in Q2 2025, accounting for 10% of the overall inventory across the top seven Indian cities. Inventory levels remained stable quarterly, while recording a significant 30% increase compared to Q2 2024—one of the steepest year-on-year rises among the key metropolitan markets.

At the zonal level, East Bengaluru continued to hold the highest share of unsold stock at 43%, followed by North Bengaluru at 32%. Both zones retained their dominant positions in terms of inventory concentration. In terms of budget segmentation, high-end units formed the largest share of the available inventory at 38%, followed by luxury housing at 31% and mid-end homes at 19%. Ultra-luxury residences accounted for 8% of the stock, while the affordable segment held a modest 5% share during the quarter.

By the end of Q2 2025, Bengaluru's inventory overhang has increased by one month quarter-on-quarter, presently at 12 months.



Outlook

Bengaluru's residential market remained stable in Q2 2025, with marginal sales growth and rising interest in the North and South zones. While overall absorption moderated, strong fundamentals and steady demand in premium segments continue to support market resilience.

Inventory levels saw a sharp year-on-year rise, especially in high-end categories, but remained steady quarter-on-quarter. With balanced supply, improving sentiment, and infrastructure-driven growth, Bengaluru is well-positioned for gradual, sustainable momentum in the coming months.

Budget Segmentation

Affordable
Mid-end
High-end
Luxury
Ultra-luxury

< ₹ 40 Lakh
 ₹ 40 Lakh - ₹ 80 Lakh
 ₹ 80 Lakh - ₹ 1.5 Cr
 ₹ 1.5 Cr - ₹ 2.5 Cr
 > ₹ 2.5 Cr

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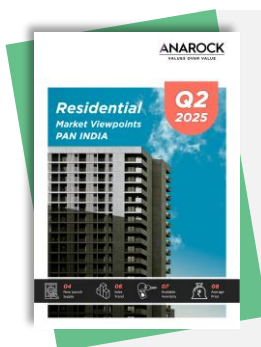
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