Residential Market Viewpoints

Hyderabad Q1 2026

ANAROCK
VALUES OVER VALUE

City Snapshot

LAUNCHES
19,300 Units
46% Quarterly Change

SALES
12,400 Units
0% Quarterly Change

AVAILABLE INVENTORY
1,03,000 Units
7% Quarterly Change

AVERAGE QUOTED BASE SELLING PRICE
₹ 7,990 /sf

Note: Basic selling price on BUA

A Bird's Eye View

Hyderabad Key Micro-markets	RENTAL VALUES Avg. Quoted Rent (₹/month)	Quarterly Change (%)	CAPITAL VALUES Avg. Quoted Rate (₹/sf)	Quarterly Change (%)	OUTLOOK Short-term
Gachibowli	32,000-43,000	1%	10,000	2%	▲
Kondapur	28,700-34,000	1%	9,700	2%	▲
Miyapur	21,000-28,000	0%	7,320	2%	▲
LB Nagar	14,200-18,000	1%	7,440	2%	▲
Adibatla	14,500-20,000	1%	5,140	2%	▲

Zonal Classification

Central	Ameerpet | Punjagutta Somajiguda | Himayatnagar | Kachiguda | Khairtabad
North	Miyapur | Pocharam | Bachupally | Nizampet | Bollaram | Yepral | Shamirpet
South	Shamshabad | Adibatla | Maheshwaram | Shadnagar | Rajendranagar | Srisailam 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

My Home Udyan
My Home Group
Tellapur
3,767 units
₹ 7,499/sqft

Team4 Aria
Team4 Life Spaces Elite LLP
Miyapur
3,085 units
₹ 7,299/sqft

Zuari Gangothri Tribhuja
Gangothri Infraedge Pvt Ltd
Kollur
1,730 units
₹ 6,299/sqft

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

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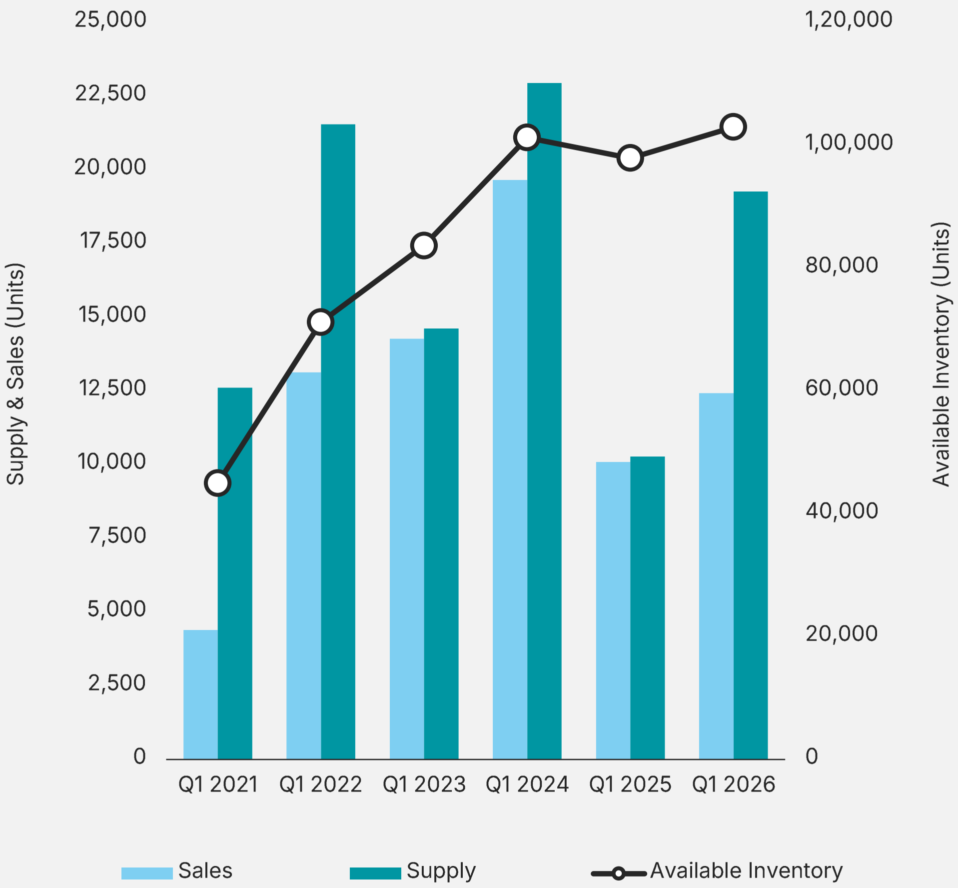
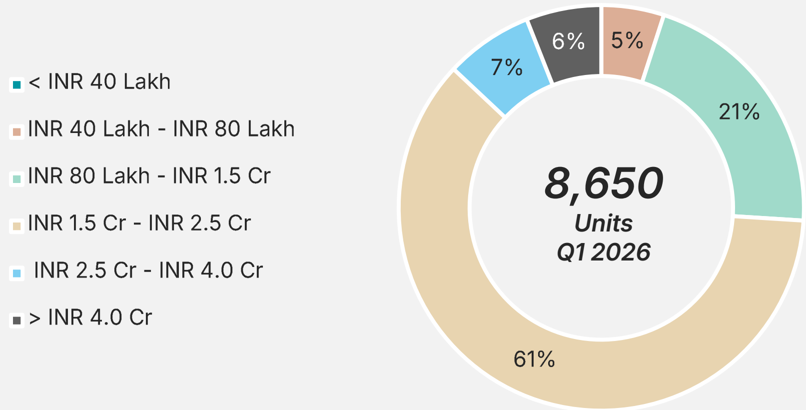
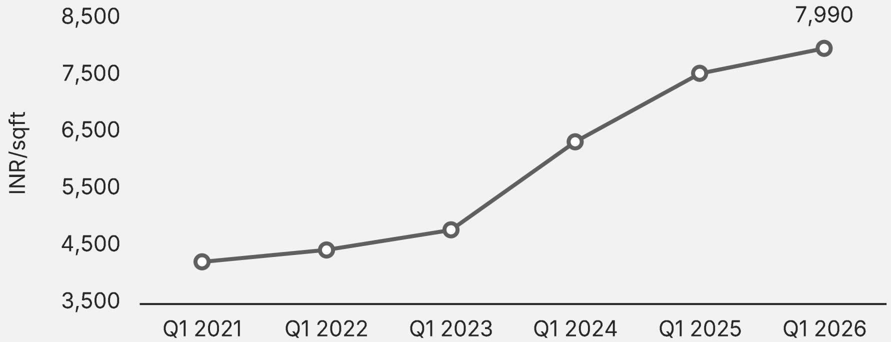
DEMAND SUPPLY DYNAMICS



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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Launches

Hyderabad witnesses strong rebound with a surge in launch activity

In Q1 2026, Hyderabad added around 19,300 new residential units, contributing nearly 15% of total launches across India's top seven cities. The city saw a significant uptick in supply, with launches increasing 46% quarter-on-quarter and 87% year-on-year, highlighting strong developer confidence and accelerating market activity.

A closer look at the distribution of launches shows that West Hyderabad continued to dominate with a 56% share of total supply, supported by a 14% quarterly increase and a 28% rise year-on-year. North Hyderabad, accounting for 30% of launches, emerged as a standout growth driver, witnessing a sharp surge of 2x quarter-on-quarter and an exceptional 7x year-on-year increase. South Hyderabad contributed 11%, recording strong momentum with launches rising 139% sequentially and 113% annually, indicating a rebound in activity following a recent phase of moderation.

Launch activity was largely led by the high-end segment, accounting for 61% of the overall supply, followed by the upper mid-end segment at 21%, highlighting strong traction in premium housing.

Sales Trend

Steady sales growth reflects sustained demand and healthy absorption

Hyderabad recorded approximately 12,400 units sold, accounting for around 12% of total residential sales across India's top 7 cities. Sales remained stable on a quarterly basis while registering a 23% year-on-year increase, reflecting sustained buyer demand and healthy absorption levels.

West Hyderabad continued to anchor demand, contributing around 52% of total city sales, followed by North Hyderabad at 25% and South Hyderabad at 17%. North Hyderabad recorded a healthy 10% quarterly and 19% year-on-year growth, while South Hyderabad, despite a marginal sequential dip, saw a strong 72% annual increase. East Hyderabad accounted for 5% of sales, witnessing a slight decline on a quarterly basis, while the Central Hyderabad remained negligible in overall contribution.

Available Inventory

Inventory levels expand 7% Q-o-Q amid elevated launch activity

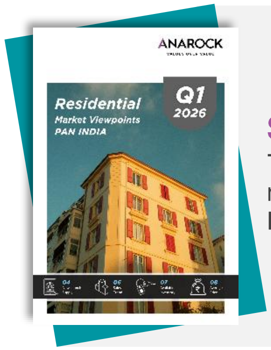
As of Q1 2026, Hyderabad's residential market recorded an available inventory of approximately 1,03,000 units, accounting for around 17% of total stock across India's top seven cities. Inventory levels witnessed a 7% increase quarter-on-quarter, primarily driven by recent additions to supply, along with a 5% rise year-on-year, indicating continued pipeline expansion alongside steady absorption.

Available inventory distribution remained heavily concentrated in West Hyderabad, which accounted for around 65% of total stock, followed by North Hyderabad at 21% and South Hyderabad at 9%. East Hyderabad contributed a smaller 5% share, while Central Hyderabad remained negligible.

Hyderabad's inventory overhang remained constant quarter-on-quarter at 26 months in Q1 2026 but increased by 2 months when compared against Q1 2025.

Outlook

As Hyderabad enters 2026, the city's residential market has emerged as the strongest performer among India's top 7 cities, supported by a thriving IT–ITeS ecosystem and a consistent inflow of skilled talent. Demand across micro-markets near major employment hubs are expected to remain strong in the coming quarters, supporting consistent price appreciation. Metro expansion plans, improved road networks, and enhanced multi-modal connectivity are expected to significantly boost accessibility across key corridors. The city's inclusion in the proposed high-speed rail network is likely to further strengthen its long-term growth.



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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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