Residential Market Viewpoints

Hyderabad Q2 2026

ANAROCK
VALUES OVER VALUE

City Snapshot

LAUNCHES
17,000 Units
-12% Quarterly Change

SALES
11,300 Units
-9% Quarterly Change

AVAILABLE INVENTORY
1,08,700 Units
6% Quarterly Change

AVERAGE QUOTED BASE SELLING PRICE
₹ 8,090 /sf



A Bird's Eye View

Hyderabad 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
Gachibowli	32,000-44,000	1%	10,150	2%	↑
Kondapur	29,000-34,500	1%	9,830	1%	↑
Miyapur	21,000-28,000	0%	7,400	1%	↑
LB Nagar	14,400-18,000	1%	7,500	1%	↑
Adibatla	14,500-20,000	0%	5,200	1%	↑

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 Super Built-up Area (SBUA)

Key Project Launches

Prestige Golden Grove
Prestige Group
Tellapur
5,120 units
₹ 8,900/sqft

Candeur Eternia
Candeur Developers
Bachupally
1,505 units
₹ 6,490/sqft

Sattva Lago Phase I
Sattva Group
Kokapet
693 units
₹ 11,400/sqft

Above average basic selling prices are quoted on Saleable Area

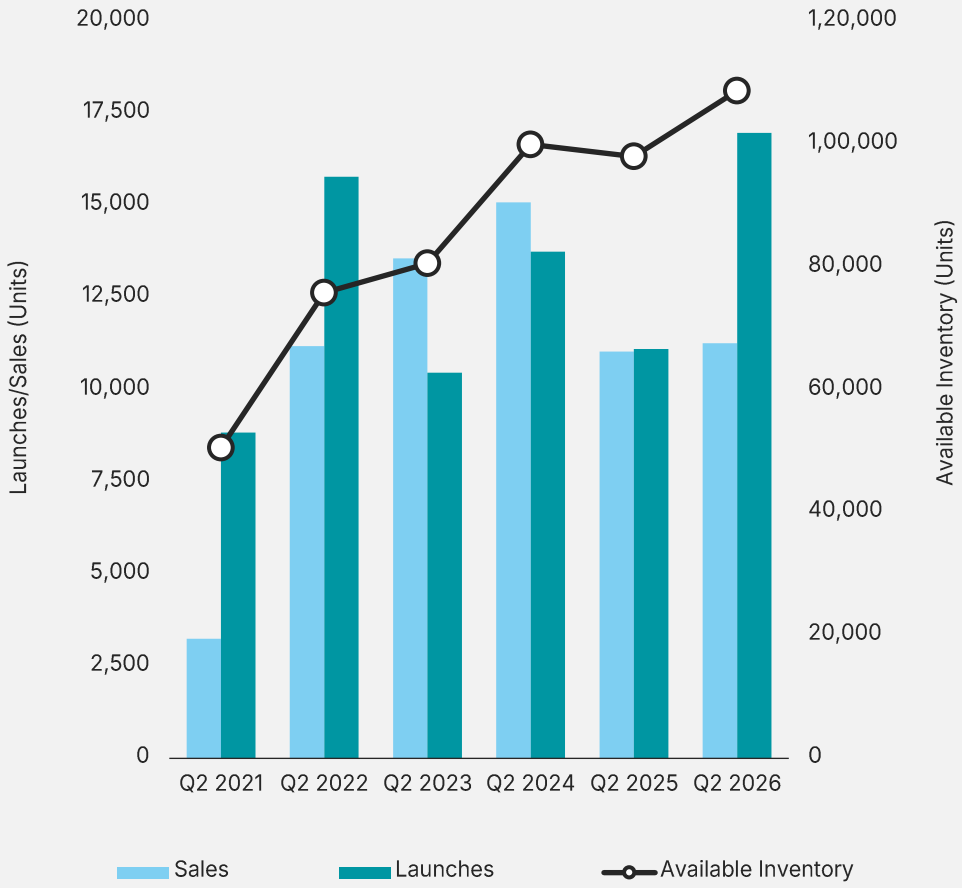
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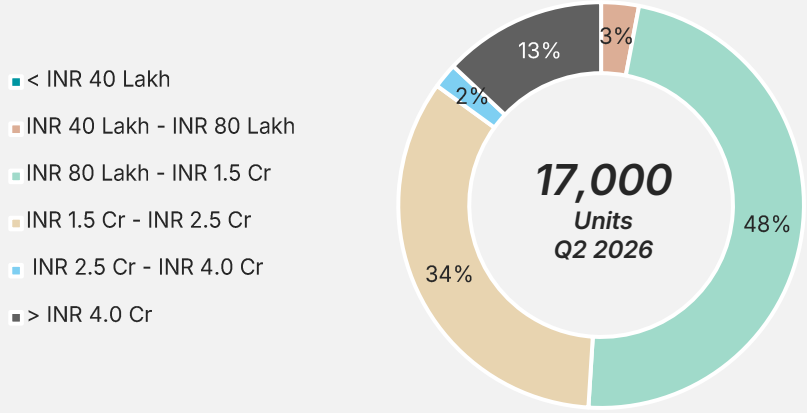
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DEMAND SUPPLY DYNAMICS



SUPPLY BUDGET-SEGMENTATION



PRICE TREND



Average Quoted Rent for 2 BHK apartment measuring 700 sf; Average Quoted Rate (Base Price) on 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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VALUES OVER VALUE

Launches

Hyderabad's launch momentum eases slightly in Q2 2026 after a strong Q1

In Q2 2026, Hyderabad added approximately 17,000 new residential units, contributing nearly 16% to the total launches across India's top seven cities. While the city saw a 12% quarter-on-quarter dip in supply, launches increased by 53% year-on-year, highlighting sustained developer confidence and robust market activity.

A closer look at the distribution of launches reveals that West Hyderabad continued to dominate with a 55% share of the total supply, supported by a 23% YoY rise. North Hyderabad, accounting for 39% of launches, emerged as a standout growth driver, witnessing a sharp 17% QoQ surge and an exceptional six-fold YoY increase. Meanwhile, South Hyderabad saw a moderation in launch activity on both a QoQ and YoY basis.

New launch activity was largely driven by the upper-mid segment, which accounted for 48% of the city's overall supply in Q2 2026, followed by the high-end segment at 34%. The ultra-luxury supply which was just 6% in Q1 2026 has more than doubled to 13% in the current quarter.

Sales Trend

Resilient annual growth in Hyderabad's housing sales amidst quarterly moderation

Hyderabad recorded approximately 11,300 units sold, accounting for 12% of total residential sales across India's top seven cities. While sales declined by 9% on a quarter-on-quarter basis, they registered a 3% year-on-year increase, indicating sustained, long-term buyer demand.

In terms of regional growth dynamics, West Hyderabad continued to anchor the market, contributing 55% of the city's total sales. Despite a 4% QoQ decline, this zone witnessed a 3% YoY increase. North and South Hyderabad followed, capturing 28% and 13% of total sales, respectively.

North Hyderabad recorded a marginal 1% QoQ dip but demonstrated a robust 10% YoY growth. Conversely, South Hyderabad experienced declines of 32% QoQ and 6% YoY. East Hyderabad saw a moderation in sales activity across both quarterly and annual metrics, while Central Hyderabad's contribution to overall city sales remained negligible.

Available Inventory

Available Inventory levels expand amid elevated launch activity

As of Q2 2026, Hyderabad's residential market held an available inventory of approximately 108,700 units, accounting for 18% of the total unsold stock across India's top seven cities. Driven primarily by elevated new launch activity, inventory levels rose by 6% quarter-on-quarter and 11% year-on-year.

Geographically, West Hyderabad dominated the inventory distribution, holding 65% of the available stock. This was followed by North Hyderabad at 23% and South Hyderabad at 8%. East Hyderabad retained a marginal share, while Central Hyderabad's presence remained negligible. On a quarterly basis, East and South Hyderabad were the only zones to register a decline in their respective inventory figures.

Consequently, Hyderabad's inventory overhang increased by one month on both a Q-o-Q and Y-o-Y basis. Standing at 27 months by the end of Q2 2026, the city currently records the highest inventory overhang among India's top seven markets.



Outlook

Hyderabad enters the second half of 2026 as one of India's fastest-growing residential markets among the top seven cities, powered by a thriving IT-ITeS sector and a steady influx of skilled professionals. Demand around key employment hubs remains strong, supporting healthy price momentum in the quarters ahead. Adding further tailwinds, transformative infrastructure investments — metro expansion, upgraded road networks such as Regional Ring Road (RRR), and inclusion in India's planned high-speed rail grid connecting Hyderabad to Chennai, Bengaluru, and Mumbai — promise to dramatically boost connectivity and augment the city's position as a long-term growth engine.



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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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