

City Snapshot

LAUNCHES	SALES	AVAILABLE INVENTORY	AVERAGE QUOTED BASE SELLING PRICE
20,850 Units	15,000 Units	58,700 Units	₹ 8,650 /sf
-7% Quarterly Change	-7% Quarterly Change	11% 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	2%	6,800	3%	▲
Whitefield	29,000-43,000	2%	9,700	4%	▲
Sarjapur Road	30,500-45,000	2%	10,500	3%	▲
Thanisandra Main Road	27,000-40,000	2%	8,850	2%	▲
Mysore Road	19,000-26,000	3%	7,350	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

Birla Evara

Birla Estates Pvt Ltd
Sarjapur Road
1,594 units
₹ 10,700/sf

Brigade Eternia

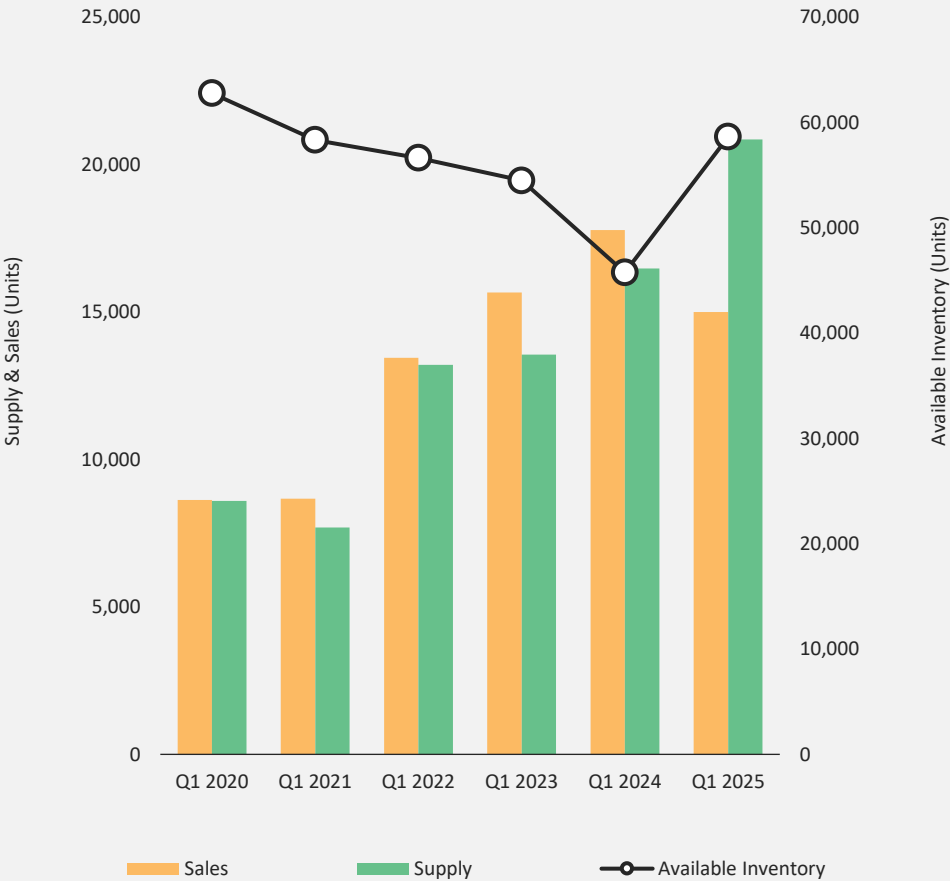
Brigade Group
Yelahanka
1,124 units
₹ 12,000/sf

Abhee Aaria

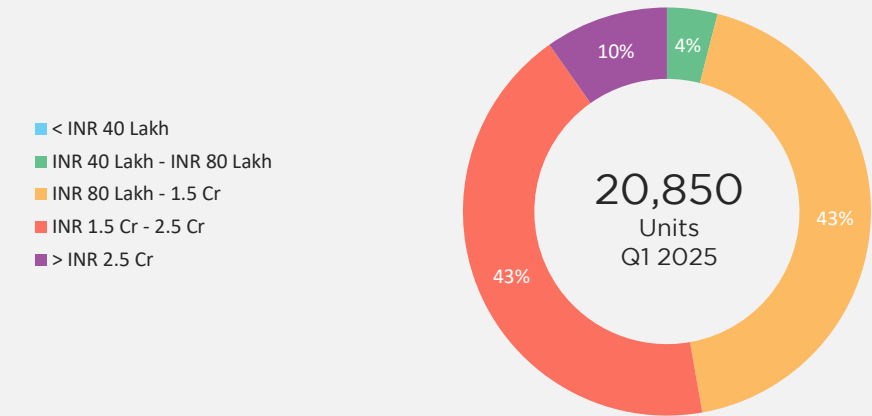
Abhee Ventures
Gunjur
1,017 units
₹ 10,300/sf

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

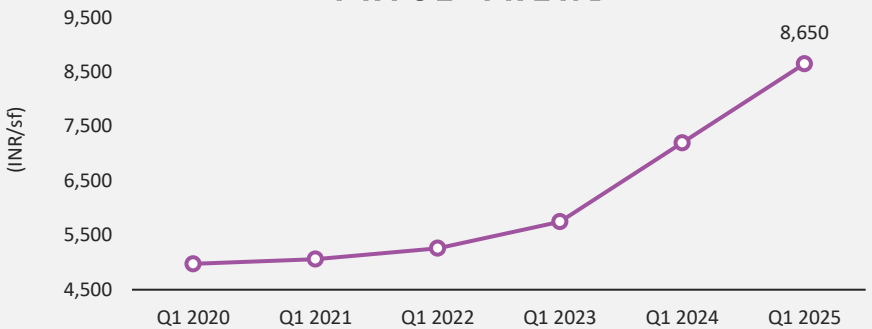
DEMAND SUPPLY DYNAMICS



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 Q1 2025

Launches

Bengaluru registers the second-highest Y-o-Y rise in new launches annually, alongside Kolkata

The city constituted 21% of the total new housing supply across the top 7 Indian metropolitan areas, positioning it as the second-largest contributor. However, the new residential launches in Bengaluru registered a 7% decline compared to the preceding quarter (Q4 2024), and a 26% increase was observed compared to Q1 2024.

Analyzing the zone-wise new residential launches within Bengaluru reveals that East Bengaluru remained the dominant zone, representing 41% of all new launches. However, this region experienced a 14% reduction in supply relative to Q4 2024.

South Bengaluru, which accounted for 20% of the new launches, demonstrated the most significant quarter-on-quarter growth in new residential supply, registering an increase of 31%.

Bengaluru's market dynamics in Q1 2025 were influenced by a strong inclination towards high-end and luxury residential properties, each constituting 43% of the new launches.

Sales Trend

Bengaluru ranks third in terms of housing sales among the top 7 cities in India

In the first quarter of 2025, Bengaluru's residential real estate market experienced a notable decline, with approximately 15,000 housing units sold. It represents a significant decline of 7% compared to Q4 2024 and a more substantial 16% reduction year-on-year from Q1 2024.

The geographical distribution of sales continues to be dominated by East Bengaluru, which maintained its leadership position with 48% of the total market share. Despite this prominence, the eastern zone registered an 8% quarter-on-quarter decrease in sales volume. Similarly, North and South Bengaluru, contributing 29% and 19%, respectively, to the overall market, displayed downward trends with quarterly sales reductions of 5% and 6%.

Available Inventory

Inventory overhang of Bengaluru witnesses an uptick on a quarterly and annual basis

Bengaluru's real estate market currently has an inventory of approximately 58,700 units. This figure represents an 11% increase from the preceding quarter and a 28% rise compared to the corresponding quarter of 2024. This increase in available inventory, observed quarterly and annually, is the highest recorded among the top seven cities.

East Bengaluru remains the predominant zone, accounting for nearly 51% of the available inventory. North Bengaluru is the second largest contributor at 32%. All the zones recorded increased available units relative to the previous quarter. Regarding budget segmentation, approximately 41% of the available inventory is within the high-end category. The luxury and mid-segment segments follow, comprising 25% and 21% of the inventory, respectively.

By the end of Q1 2025, Bengaluru's inventory overhang has increased by one month quarter-on-quarter, presently at 11 months.



Outlook

Bengaluru's residential market is poised for sustained growth in the upcoming quarters of 2025, buoyed by the city's resilient IT-ITeS sector that continues to drive housing demand. The recent RBI repo rate reduction has enhanced affordability and may stimulate buyer interest. While infrastructure development in peripheral micro markets remains challenging, several metro line extensions and improved connectivity projects will likely unlock new residential corridors. While affordability concerns persist due to supply chain pressures and rising construction costs, Bengaluru's fundamental demand drivers remain strong, with the work-from-office trend reinforcing housing requirements near employment hubs and positioning the market for resilient performance through 2025.

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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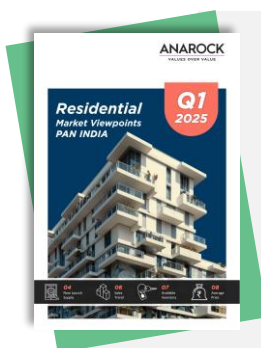
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