Residential Market Viewpoints

Hyderabad Q1 2025

ANAROCK
VALUES OVER VALUE

City Snapshot

LAUNCHES
10,300 Units
34% Quarterly Change

SALES
10,100 Units
-9% Quarterly Change

AVAILABLE INVENTORY
97,950 Units
Nil Quarterly Change

AVERAGE QUOTED BASE SELLING PRICE
₹ 7,550 /sf

Note: Basic selling price on BUA

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	30,500-42,500	1%	9,500	3%	Increase
Kondapur	27,500-34,000	2%	9,200	3%	Increase
Miyapur	20,500-28,000	2%	7,000	3%	Increase
LB Nagar	14,000-18,000	2%	7,100	2%	Increase
Adibatla	14,500-19,300	1%	4,850	2%	Increase

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

MoonGlade Apartments
E Infra Ira Ventures
Narsingi
2,471 units
₹ 8,999/sf

Raghava Cinq
Raghava Highrise Projects
Nanakaramguda
1,132 units
₹ 9,300/sf

DSR Altitudes
DSR Builders And Developers
Osman Nagar
980 units
₹ 7,598/sf

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

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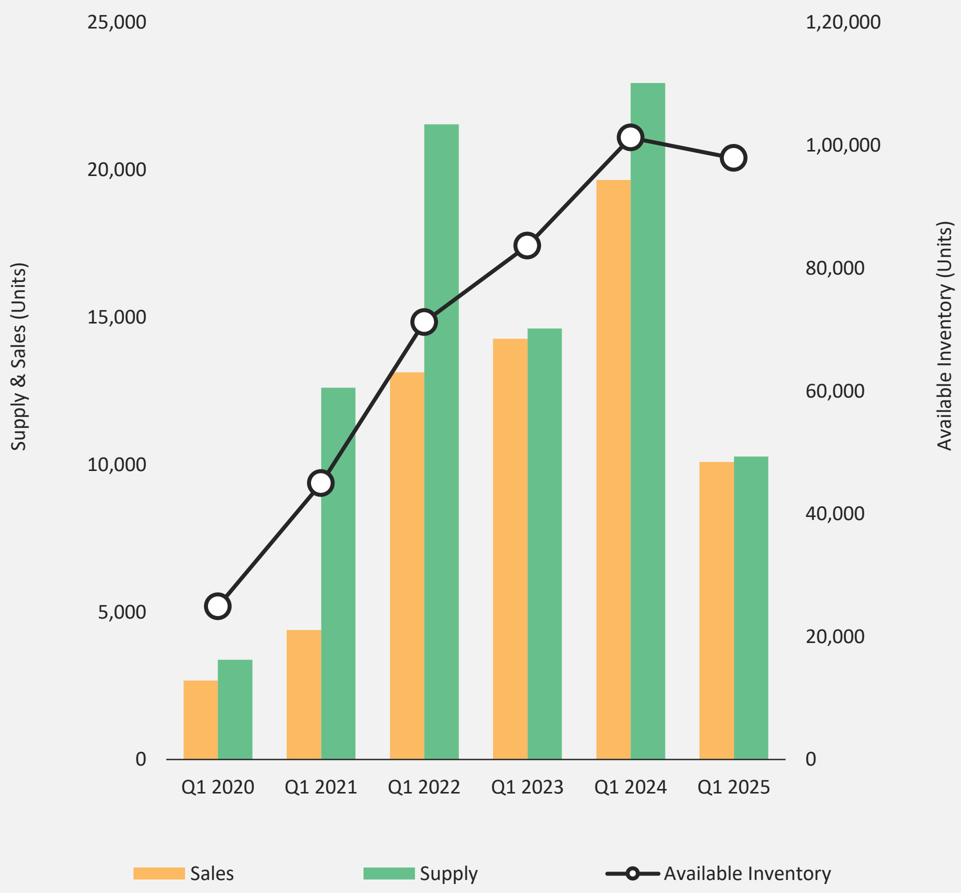
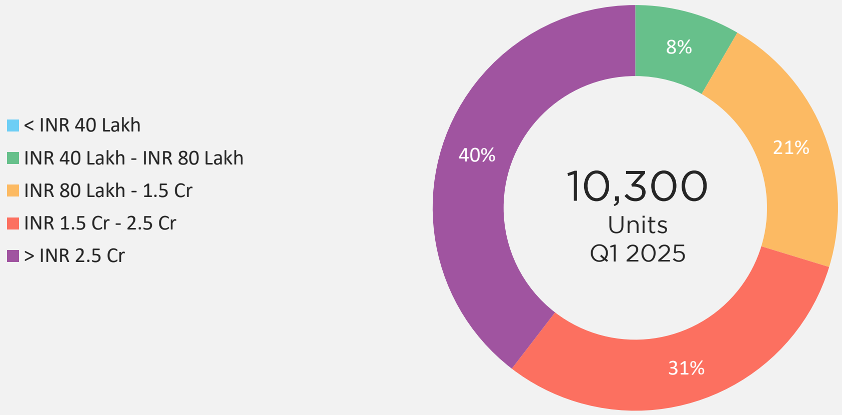
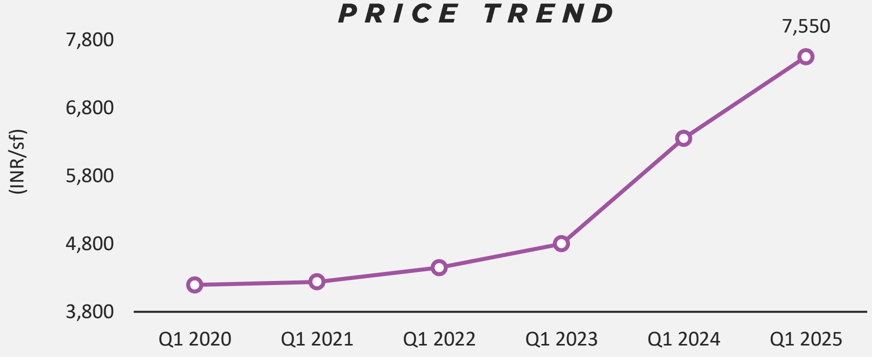
DEMAND SUPPLY DYNAMICS



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 records the second-highest growth in new residential launches compared to Q4 2024

Accounting for a 10% share among the top seven cities with approximately 13,900 units launched, Hyderabad's new supply declined significantly by 55% year-on-year. However, the market demonstrated robust sequential growth, with launches increasing 34% quarter-on-quarter, the second-highest among top cities. This quarterly rebound suggests a recalibration and potential renewed developer activity following the earlier dip.

West Hyderabad continued its dominance, accounting for 82% of new launches—a massive 242% increase from the prior quarter. This underscores the intense focus and likely sustained demand within this zone, standing in contrast to declines experienced in all other zones. Ultra-luxury and luxury properties collectively accounted for 71% of the total supply. This concentration in luxury segments indicates developers are increasingly targeting affluent buyers, potentially reflecting prevailing market demand dynamics in Hyderabad.

Sales Trend

More than half of Hyderabad's housing sales are concentrated in West Hyderabad

Hyderabad's residential real estate market represented an 11% share of total housing sales across India's top 7 cities in Q1 2025, with approximately 10,100 units sold. Despite this contribution, the city experienced a notable downturn, with sales dropping by 9% quarter-on-quarter and a substantial 49% year-on-year decline compared to Q1 2024, indicating a potential cooling in market momentum.

Within Hyderabad, West Hyderabad remained the dominant micro-market, accounting for a robust 55% of sales, followed by North Hyderabad at 26%. Consistent with the overall city trend, all zones in Hyderabad registered a quarterly decline in sales, varying from 3% to 22%.

Available Inventory

Available inventory in Hyderabad remained stable quarter-on-quarter

As of Q1 2025, Hyderabad's available inventory reached approximately 97,950 units. It represents a stable position quarter-on-quarter, albeit a modest 3% decline year-on-year. Consequently, Hyderabad maintains its status as India's second largest market for available stock, contributing nearly 17% to the Pan India total.

Geographically, the inventory remains heavily concentrated in West Hyderabad (62%), highlighting the zone's dominance. North Hyderabad held second highest volume of available units, accounting for 24%. Analysis by budget segment reveals a notable concentration (51%) in high-end units, suggesting a significant focus on or potential oversupply within this price segment.

This quarter saw the city's inventory overhang increase by 4 months to 24 months, indicating a potential moderation in the pace of absorption compared to supply levels.

Outlook

Hyderabad's residential market continues its upward trajectory with significant growth potential anticipated in 2025. The city's balanced approach to urban development and strategic infrastructure investments has created multiple residential hotspots beyond the traditional western corridor. The city's relatively affordable capital values compared to Bengaluru and decreasing home loan rates following the RBI's policy adjustment will likely accelerate decision-making among fence-sitters. The expanding IT-ITeS footprint and emerging pharma and R&D sectors continue to drive housing demand. The government's focus on decentralized development and improved connectivity across growth corridors positions Hyderabad as one of the most promising residential markets nationally.

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Budget Segmentation

Affordable	< ₹ 40 Lakh
Mid-end	₹ 40 Lakh - ₹ 80 Lakh
High-end	₹ 80 Lakh - ₹ 1.5 Cr
Luxury	₹ 1.5 Cr - ₹ 2.5 Cr
Ultra-luxury	> ₹ 2.5 Cr

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