1 Finance

HYDERABAD HOUSING MARKET

OCTOBER - DECEMBER 2025

1 FINANCE RESEARCH

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Expert Insight with Ravi Netha

1 Finance Research - Q4 2025



Ravi Netha, Founder of HydUrban Realty, is a real estate advisor focused on the Hyderabad residential market. Through HydUrban Realty, he provides research-driven guidance to homebuyers and investors, closely tracking market trends, infrastructure developments, and pricing dynamics across Hyderabad's key growth corridors.

As part of this report, 1 Finance conducted a Q&A discussion with Ravi Netha to capture an industry practitioner's perspective on recent developments in the Hyderabad housing market

01. Is the current Hyderabad real estate market in a growth cycle, balanced phase, correction phase, or stable stage?

According to our observations, the Hyderabad residential real estate market is currently moving through a healthy correction phase.

This should not be viewed as a slowdown, but rather as a natural recalibration of the market after a strong growth period over the past few years.

During the previous cycle, property values in several micro-markets witnessed rapid appreciation within a short span of time, which created a temporary affordability gap for many end users.

The current phase is allowing the market to stabilize and align pricing with buyer sentiment and purchasing capacity.

What we are seeing now is a more rational and sustainable market environment where:

- Buyers are becoming more active again as affordability improves.
- Developers are focusing on value-driven offerings and realistic pricing.
- Genuine end-user demand is returning to the market.

This correction is therefore strengthening the long-term fundamentals of Hyderabad's real estate sector, enabling buyers to confidently explore and purchase their dream homes at more balanced price points.

From our perspective, phase is a positive structural adjustment that will support the next sustainable growth cycle for the city's real estate market.

Expert Insight with Ravi Netha

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02. Which areas within Hyderabad do you believe are best positioned for steady growth over the next few years, and how important is infrastructure in shaping that outlook?

The hyderabad western corridor continues to remain one of the strongest residential growth zones in the city.

Areas such as Kokapet, Neopolis, Financial District, Narsingi, Puppalaguda, and Nanakramguda benefit from their close proximity to Hyderabad’s major IT and business districts.

These locations have already witnessed strong residential demand due to convenient access to workplaces, well-developed social infrastructure, and the presence of several premium residential developments.

At the same time, emerging micro-markets such as Tellapur, Kollur, and Osman Nagar are gaining momentum due to their strong connectivity through the Outer Ring Road (ORR) and their relative proximity to the Financial District and the broader IT corridor.

These areas are witnessing the development of large gated communities and high-rise residential projects, supported by improved road connectivity and growing interest from both homebuyers and developers.

Another important growth corridor that is increasingly attracting attention is the Budvel–Shamshabad belt. Budvel is witnessing significant infrastructure-led development, including planned IT and mixed-use clusters, which are expected to transform the area into a major residential and commercial hub in the coming years. Its proximity to the Rajiv Gandhi International Airport, along with improved connectivity through the ORR and upcoming infrastructure projects, is driving growing developer interest in this region.

The Shamshabad corridor is also seeing strong development activity, with several large developers such as Godrej, Ramky, Prestige Group , large-scale residential and integrated township developments.

These projects are expected to create new residential clusters supported by commercial growth, hospitality developments, and airport-driven economic activity in the southern part of Hyderabad.

Infrastructure continues to play a critical role in shaping the long-term outlook of these locations.

Connectivity through the Outer Ring Road, airport access, radial road expansions, and other planned infrastructure projects is significantly influencing buyer preferences and developer investments.

As these infrastructure initiatives mature, they are expected to further strengthen the residential potential of these emerging corridors.

Overall, from the standpoint thr locations that combine strong infrastructure connectivity, proximity to employment hubs, and large-scale planned developments—particularly along the western corridor and the emerging Budvel–Shamshabad growth belt—are likely to drive Hyderabad’s next phase of residential growth.

Expert Insight with Ravi Netha

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03. How does Hyderabad currently compare with Bengaluru in terms of pricing, demand momentum, and long-term investment attractiveness? Do you see Hyderabad maintaining its relative affordability advantage?

Both Hyderabad and Bengaluru are strong technology-driven real estate markets, but they differ in terms of market maturity, infrastructure dynamics, and affordability positioning.
Bengaluru has historically been a more established technology hub with a mature real estate market and a long track record of demand from the IT and startup ecosystem.

Hyderabad, on the other hand, has emerged very strongly over the past decade and is increasingly positioning itself as a competitive alternative to Bengaluru, supported by rapid infrastructure development and expanding corporate presence.

One of Hyderabad's key advantages today is its planned infrastructure and connectivity. Wider roads, strong connectivity through the Outer Ring Road, and expanding urban corridors have helped the city maintain relatively smoother mobility compared to many other large metropolitan markets.

This has enhanced the overall livability experience and made Hyderabad increasingly attractive for professionals relocating to the city.

Another important factor is the growing presence of Global Capability Centres (GCCs), IT companies, and pharmaceutical firms, which continue to expand their operations in Hyderabad.

This steady influx of companies is driving employment growth and supporting sustained residential demand.

In terms of pricing, Hyderabad still offers relatively better value when compared to Bengaluru, particularly when evaluating the scale of developments and the quality of lifestyle offerings.

The city is witnessing a significant shift toward premium gated communities and high-rise developments, with several projects now reaching 40 to 50+ floors and transforming the city's residential skyline.

This reflects a broader trend of homebuyers upgrading to higher-quality living environments and larger community developments.

From a long-term investment perspective, Hyderabad remains highly attractive due to its infrastructure-led growth, expanding employment base, and continued availability of land for planned developments. While Bengaluru will continue to remain a major technology and residential market, Hyderabad is steadily strengthening its position and is likely to retain a relative affordability advantage while offering strong potential for long-term capital appreciation.

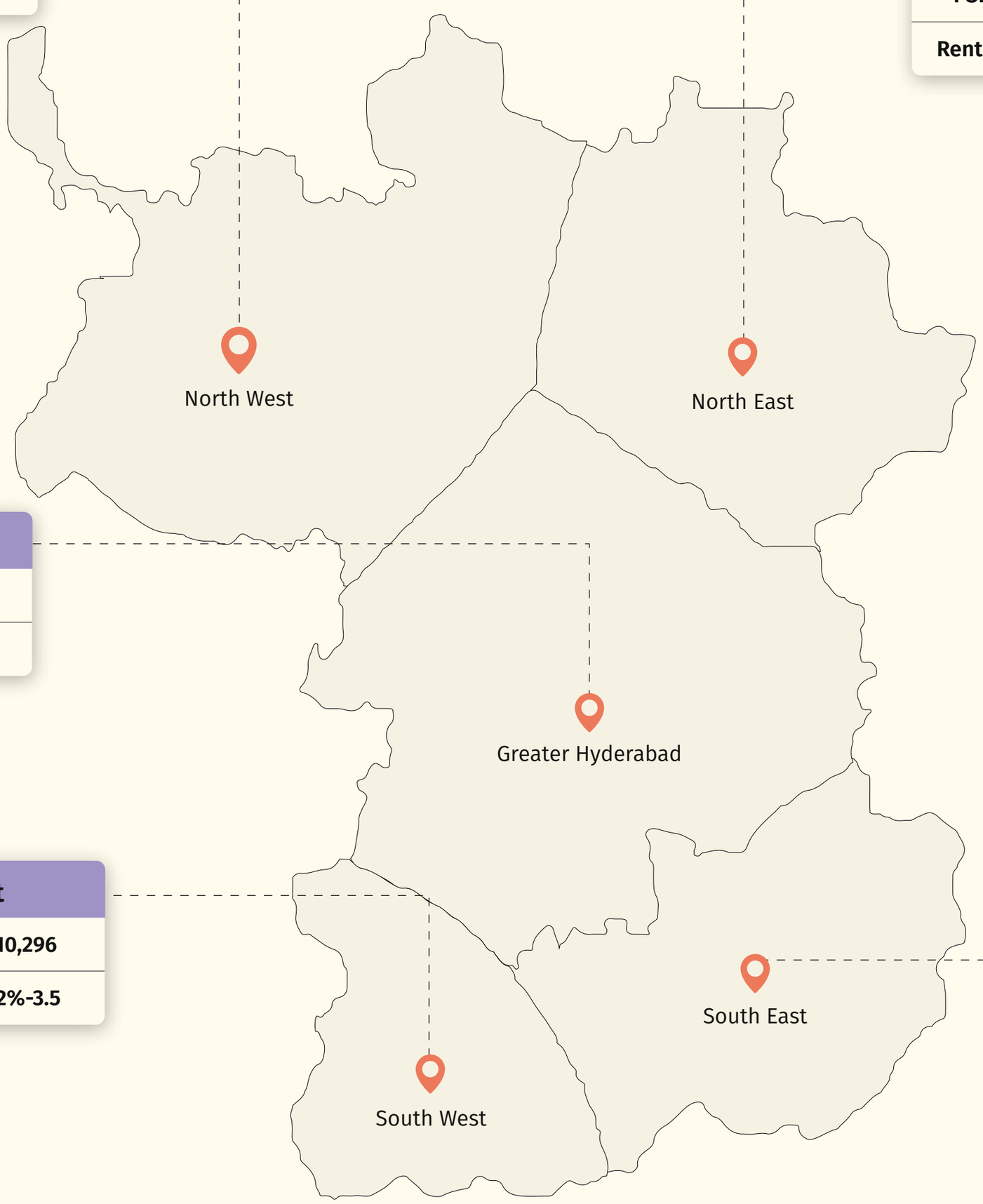
Hyderabad today represents a compelling real estate market that combines infrastructure growth, livability improvements, and strong housing demand, making it an increasingly attractive destination for both end-users and long-term investors.

Hyderabad - Residential Real Estate

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North West	
PSF Rate	₹9,032
Rental Yield	3.6%-2.7%

North East	
PSF Rate	₹7,087
Rental Yield	2.7%-2.9%



Greater Hyderabad	
PSF Rate	₹8,486
Rental Yield	3.4%-3.6%

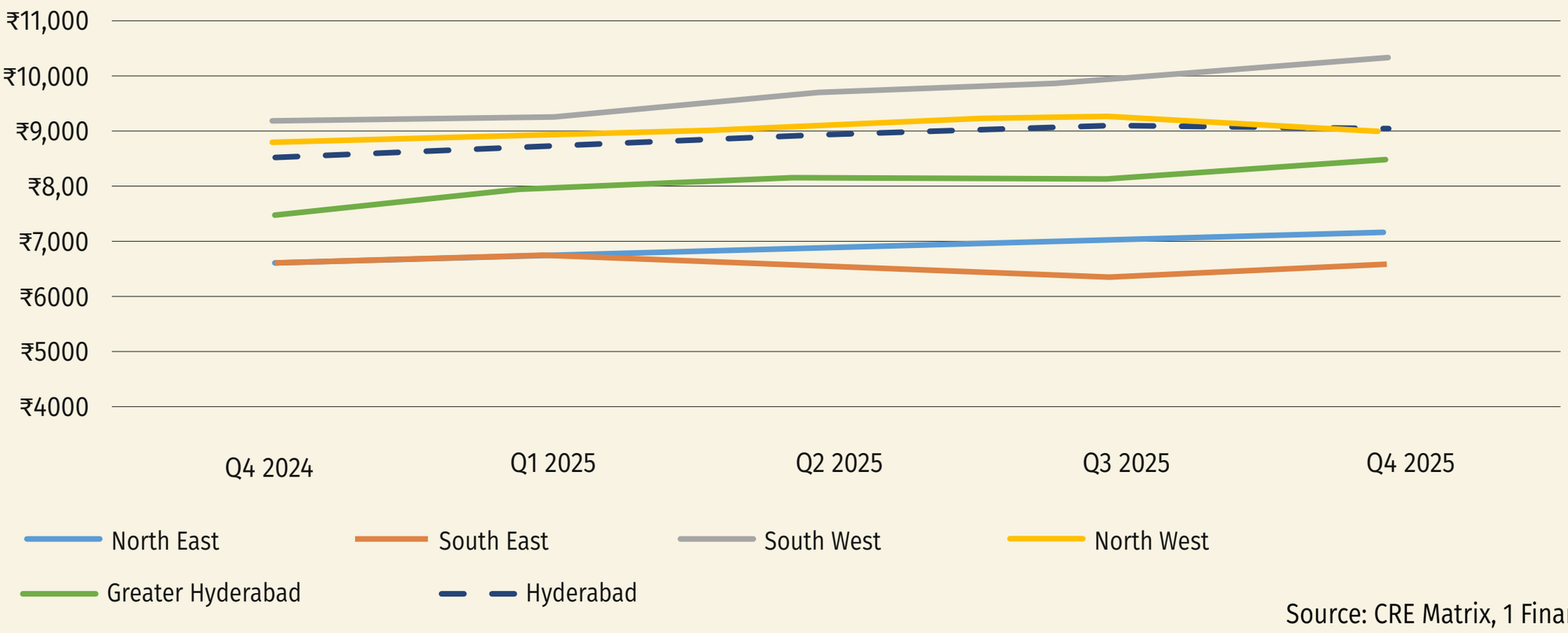
South East	
PSF Rate	₹6,492
Rental Yield	2.2%-2.3%

South West	
PSF Rate	₹10,296
Rental Yield	3.2%-3.5

Hyderabad - Residential PSF Rates

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Hyderabad Macro Markets Per-Square-Foot Rates



Source: CRE Matrix, 1 Finance Research

South West Hyderabad emerged as the strongest performer, with PSFs rising consistently through the year. North West Hyderabad also recorded moderate appreciation. Greater Hyderabad continued to record steady appreciation from a lower base, reflecting affordability led demand.

Quarterly and Annually Per-Square-Foot Price Changes

No	Macro Markets Area	PSF Rates		Rates Changed QoQ%	PSF Rates		YoY % Change
		Q3 2025	Q4 2025		Q4 2024	Q4 2025	
1	Greater Hyderabad	₹8,172	₹8,486	3.9%	₹7,434	₹8,486	14.2%
2	South West	₹9,963	₹10,296	3.3%	₹9,126	₹10,296	12.8%
3	North East	₹6,964	₹7,087	1.8%	₹6,557	₹7,087	8.1%
4	North West	₹9,251	₹9,032	-2.4%	₹8,770	₹ 9,032	3.0%
5	South East	₹6,345	₹6,492	2.3%	₹6,585	₹6,492	-1.4%
	Hyderabad	**₹9,081**	**₹9,029**	**-0.6%**	**₹8,496**	**₹9,029**	**6.3%**

Source: CRE Matrix, 1 Finance Research

Greater Hyderabad recorded the strongest quarter-on-quarter growth at 3.9%. Southwest Hyderabad also saw healthy QoQ gains of 3.3%.In contrast, North West Hyderabad and Hyderabad on average recorded marginal QoQ declines of 2.4% and 0.6%, respectively. North East and South East Hyderabad posted decent QoQ gains.

Hyderabad - Public Infrastructure

1 Finance Research - Q4 2025

Development of Public Infrastructure

Project	Location	Start Date	Status	Timeline/Revised timeline
H-Citi Programme: 38 Innovative Traffic Projects	Across Hyderabad,including KBR Park, Fox Sagar Nala,Cyberabad, Jubilee Hills	Bid Invites Feb 2025	Several Projects under tendering/ awarding, execution of priority corridors started	Complete by 2026-27
Multi-Levels Flyovers and Road Expansions	KBR Park, Jubilee Hills, Khajaguda, Serilingampally IIT, Wipro Junction	2025	Planning / early works underway	Complete by Dec 2030
Road Widening (Several Corridors)	MG Bus Station Chandravangutta, Jubilee Hills, etc	2025	Pre-construction and early works underway	Full network 2028-29 range
New Bus Station and Depots	Midhani Area	2025	Approved, tendering / advanced planning	by Dec 2030
World Trade Centre	Raviryala, Hardware Park, Shamshabad	2023	80 km stretch operational; remaining under construction	Completion by 2027-28

Source: CRE Matrix, 1 Finance Research

Hyderabad’s infrastructure pipeline is focused on improving road connectivity and easing congestion across key western and central corridors. Phased completion of flyovers, road widening, and the H-Citi traffic programme through 2027–28 is expected to support steady residential demand, particularly in employment-linked and peripheral micro-markets, with price appreciation remaining gradual and corridor-specific.

Hyderabad - New 10 Launches Q4 2025

1 Finance Research - Q4 2025

Projects With the Highest Number of Units Launched

No	Project	Developer	Launched Date	Total Launched	Area	Rera Completion
1	My Home Vipina	My Home Group	Apr-2023 to Oct-2025	3720	Tellapur	Jan-28
2	Meera Shantivanam	Meera Shantivanam	Jan- 2019 to Oct-2025	2860	Nandigama	Mar-2023 to Aug-2030
3	Aparna Sunstone	Aparna Constructions	Jan-202 to Dec-2025	2505	Osman Nagar	Dec-28
4	Avantika Crisanto	Avantika Constructions	Nov-25	1920	Ameenpur	May-2029 to May-2029
5	Tattva Ariya	Tattva Developers	Dec-25	1750	Miyapur	Dec-29
6	Nova by Raghava	Raghava Projects	Nov-25	1440	Nanakramguda	Nov-31
7	Aurum	Sree Varaaha Group	Nov-25	594	Nanakramguda	Nov-31
8	Lansum El Palacio	Lansum Properties	Nov-25	504	Puppalaguda	Jun-30
9	Avani	Sri Gayatri Housing	May- 2023 to Dec- 2025	480	Shaikpet	May-2026 to Jun-2030

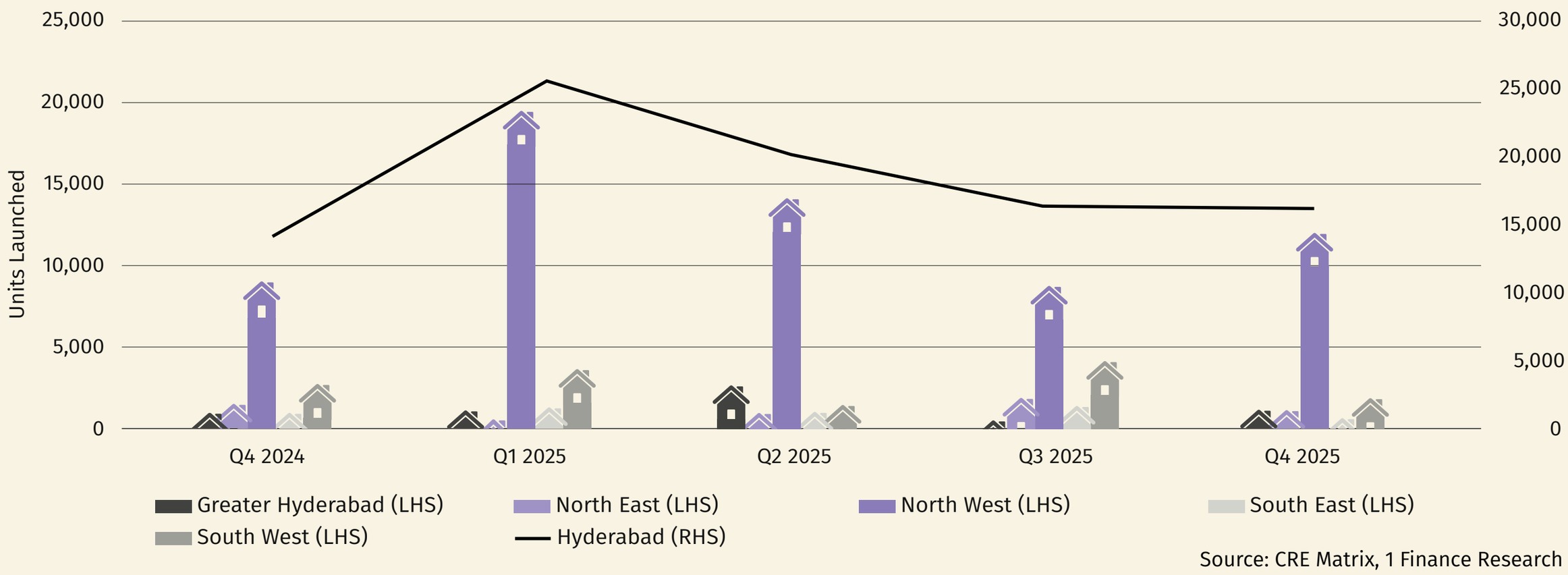
Source: CRE Matrix, 1 Finance Research

The pipeline shows large, phased launches across peripheral growth corridors, concentrated between 2029–2032. High unit counts with limited buildings indicate dense, vertical formats. Established developers like My Home Group, Aparna Constructions, and Meera Shantivanam anchor supply, suggesting execution-led, scale-driven development strategies.

Hyderabad - Units Launched & Sold

1 Finance Research - Q4 2025

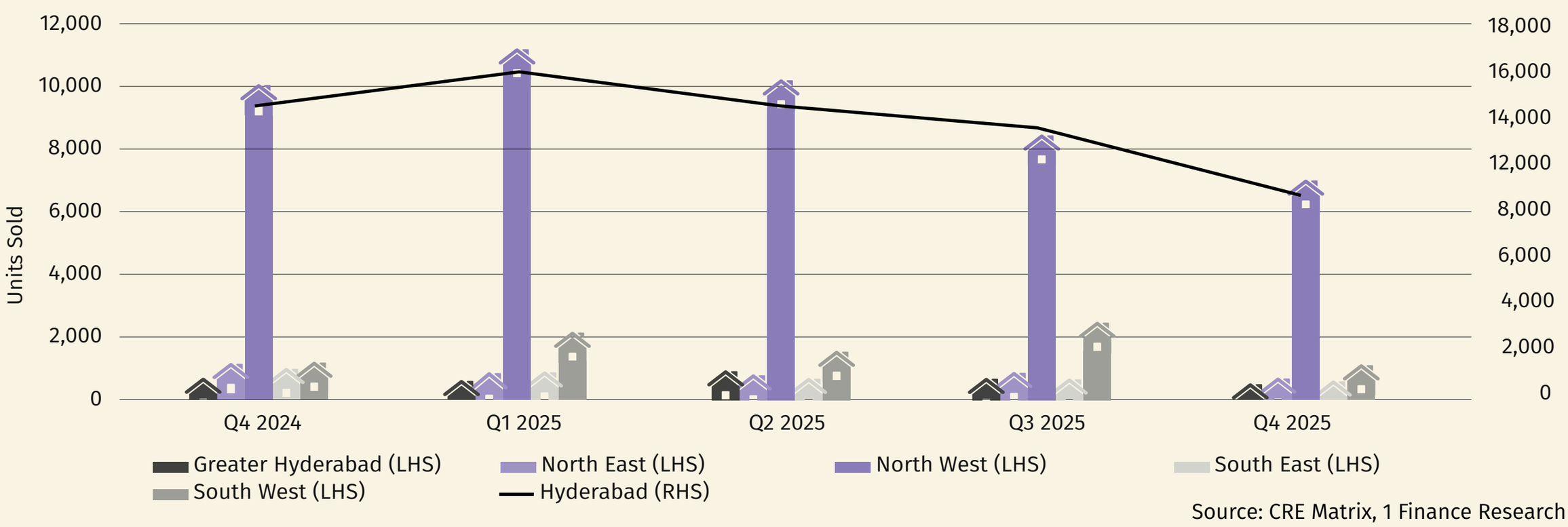
New Units Launched



Source: CRE Matrix, 1 Finance Research

City-level launches rose from 14,452 units in Q4 2024 to a high of 25,479 units in Q1 2025, declined steadily through Q3, and stabilised at 16,138 units in Q4 2025, indicating a clear pullback in new supply. North West Hyderabad dominated launch activity across all quarters, underscoring its role as the primary supply corridor.

Units Sold



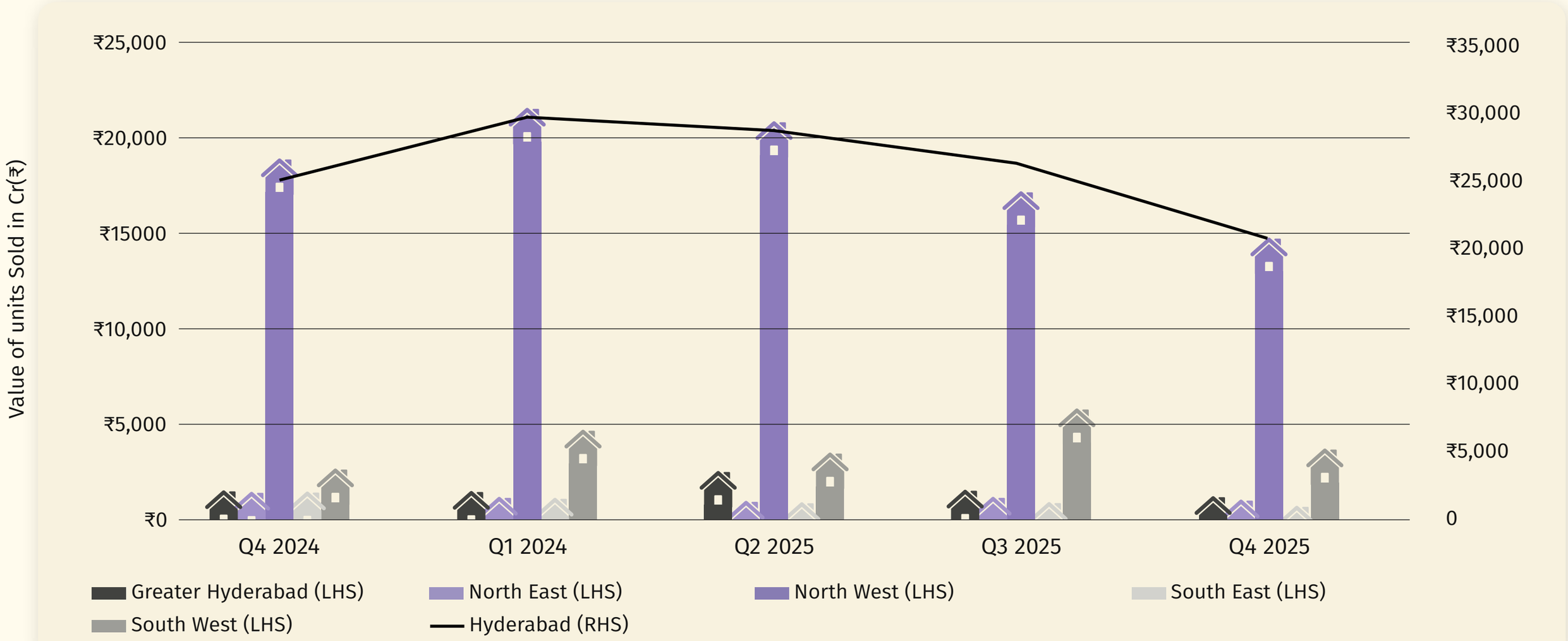
Source: CRE Matrix, 1 Finance Research

City-level sales peaked in Q1 2025 at 15,716 units, before declining consistently to 9,887 units in Q4 2025. North West Hyderabad remained the dominant contributor to sales volumes, but saw a sharp decline from its Q1 peak. Overall, Hyderabad's demand has weakened across most corridors.

Hyderabad - Sales Dynamics

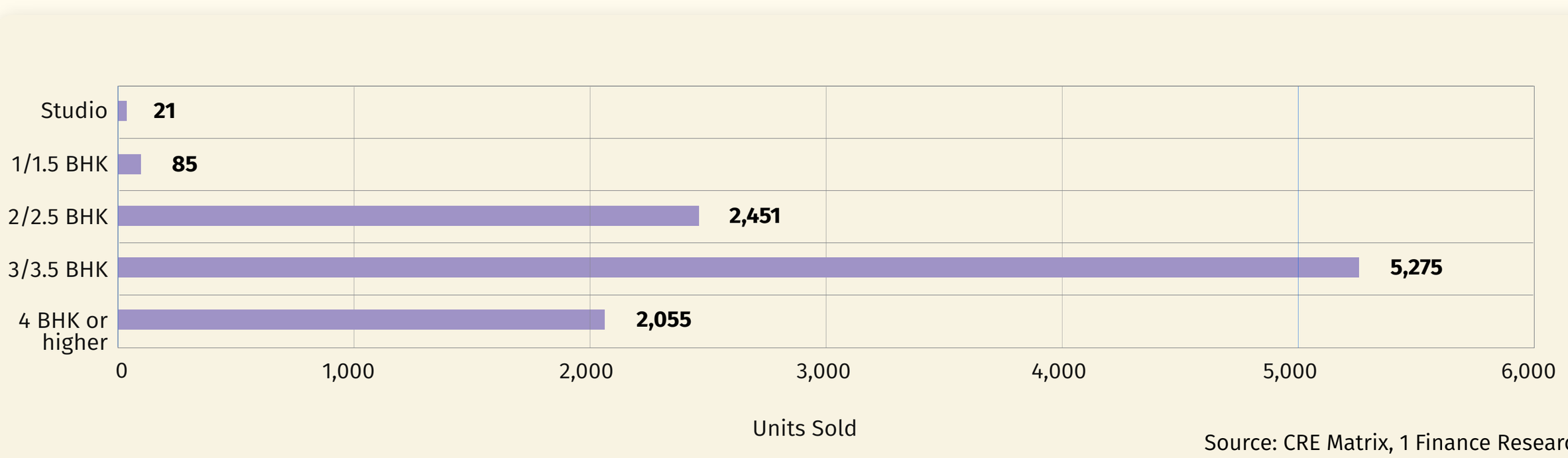
1 Finance Research - Q4 2025

Total Sale Of ₹20,997 Cr in Q4 2025.



The value of residential sales across Hyderabad declined steadily through 2025 after peaking in Q1, mirroring the slowdown in unit absorption. City-level transaction value rose from ₹25,303 crore in Q4 2024 to ₹29,251 crore in Q1 2025, before easing consistently to ₹20,977 crore in Q4 2025, indicating a more cautious buying environment in the second half of the year.

Bifurcation of Units Sold in Q4, 2025



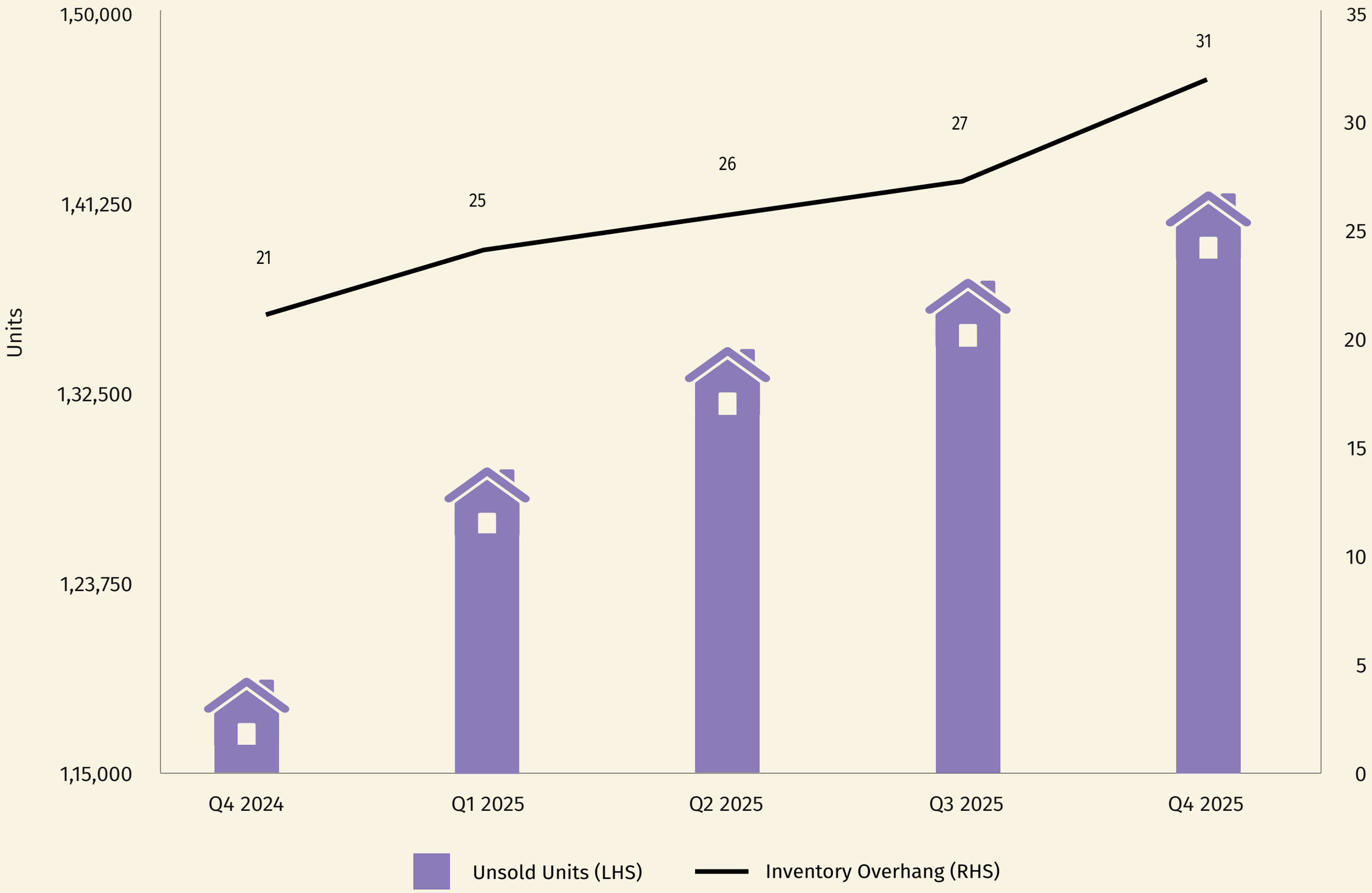
Source: CRE Matrix, 1 Finance Research

Sales in Q4 2025 were heavily skewed toward larger configurations. 3/3.5 BHK units dominated absorption, with 5,275 units sold, followed by 2/2.5 BHK units at 2,451 units, indicating strong end-user preference for mid-to-large homes. 4 BHK and larger units accounted for 2,055 sales, reflecting selective but meaningful demand for premium configurations.

Hyderabad - Unsold Units

1 Finance Research - Q4 2025

Comprehending Inventory Overhang



Source: CRE Matrix, 1 Finance Research

Unsold inventory in Hyderabad rose steadily through 2025, increasing from 1,18,943 units in Q4 2024 to 1,41,575 units in Q4 2025, indicating sustained supply additions outpacing absorption. Inventory overhang widened sharply over the same period, rising from 21 months to 31 months, reflecting a pronounced slowdown in sales velocity.

Outlook

1 Finance Research

Hyderabad’s PSF growth is expected to remain gradual and corridor-specific in the near term. While affordability led demand and ongoing infrastructure upgrades support prices in select western and peripheral markets, rising unsold inventory and slowing absorption will cap broad-based upside. Overall, Hyderabad is likely to see range-bound pricing, with performance driven more by micromarket fundamentals than citywide momentum.



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