



INTELLIGENT INVESTMENT

# *India* MARKET MONITOR

## Q1 2026 - Residential

REPORT | CBRE RESEARCH

April 2026

# CBRE

# India Market Monitor Q1 2026

## RESIDENTIAL

India's residential sector maintained a steady trajectory throughout January-March (Q1) 2026, navigating a cyclical phase of market normalisation amidst intensifying geopolitical uncertainties. **Sales volumes reached ~65,250 units, representing a 4% quarterly increase.** However, annual comparisons indicated a marginal moderation of 7%, highlighting the structural reconfiguration within the sector. Meanwhile, developers launched over 74,000 new units during the quarter.

*\*Note - Definition of segments as per ticket size (INR) for (Mumbai & Delhi NCR): Affordable up to 45 lakh; Budget 45-75 lakh; Mid-end 1-1.5 cr; High-end 1.5-3 cr; Premium 3-6 cr; Luxury 6-50 cr and Ultra Luxury 50 cr and above.*

*For (Bengaluru & Hyderabad): Affordable up to 45 lakh; Budget 45-75 lakh; Mid-end 75 lakh-1.5 cr; High-end 1.5-2.5 cr; Premium 2.5-5 cr; Luxury 5-50 cr and Ultra Luxury 50 cr and above.*

*For (Pune, Chennai & Kolkata): Affordable up to 45 lakh; Budget 45-75 lakh; Mid-end 75 lakh-1.25 cr; High-end 1.25-2.5 cr; Premium 2.5-4 cr and Luxury 4 cr and above.*

# Residential



# 23%

Q-o-Q growth in new launches in Q1 2026

# 4%

Q-o-Q increase in housing sales during the quarter

# 34%

Y-o-Y jump in luxury apartment sales in Q1 2026\*

# 28%

Share of high-end and mid-end projects

# 61%

Cumulative share of Bengaluru, Mumbai, and Hyderabad in launches in Q1 2026

# 58%

Collective share of Mumbai, Pune, and Hyderabad in sales during the quarter

# India Market Monitor

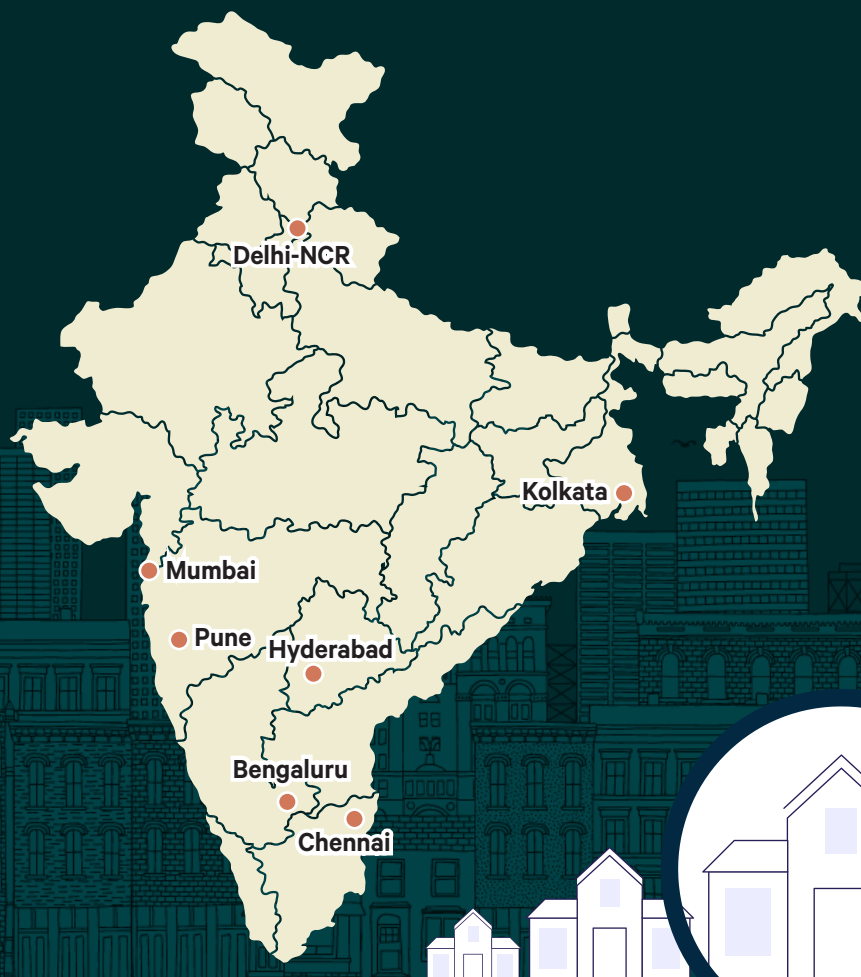
## Residential

~65,250

Sales in Q1 2026

~74,200

Unit launches in Q1 2026



Q1 2026 CV\*\* indicator arrows (Q-o-Q)  
 ▲ Increase    ⇄ Stable    ▼ Decrease

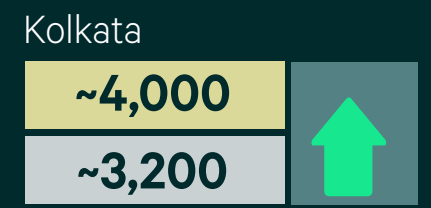
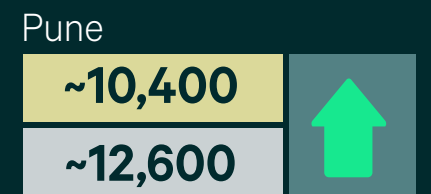
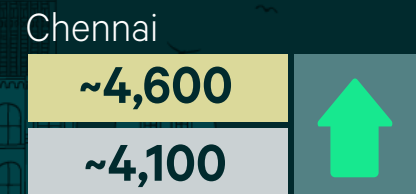
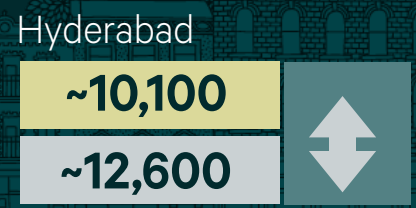
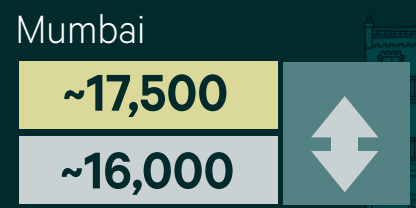
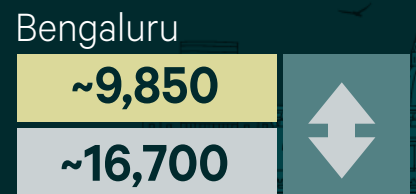
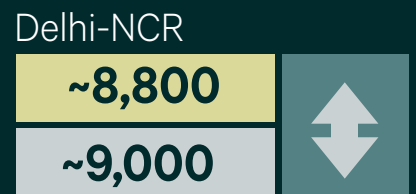
■ Sales in Q1 2026    ■ Unit launches in Q1 2026

\*\*Capital value  
 Source: CBRE Research, Q1 2026

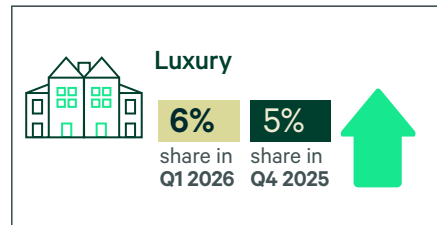
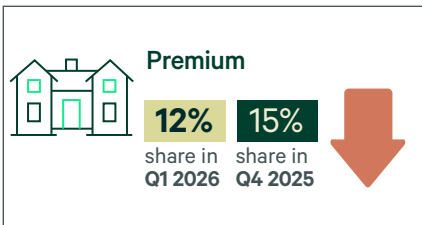
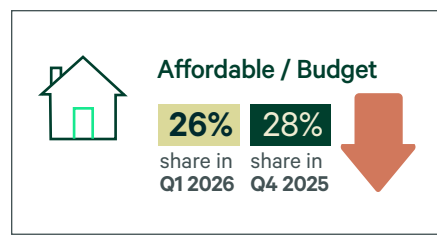
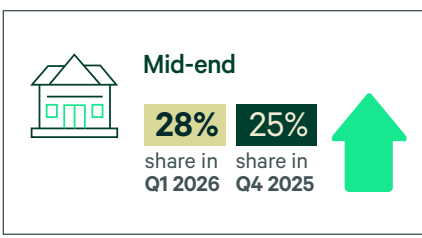
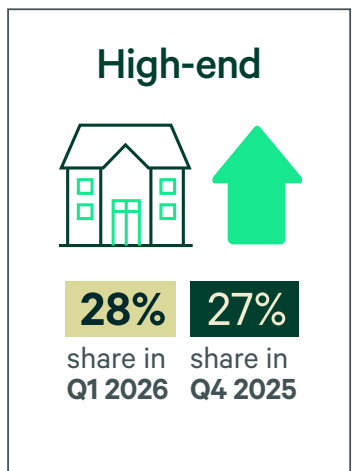
Note:

1. The numbers have been rounded off and might not add up to the exact total.

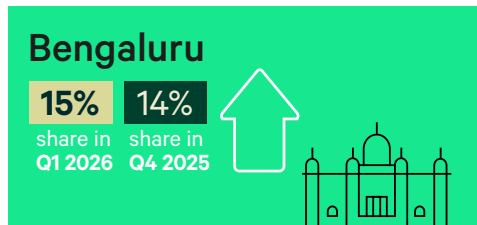
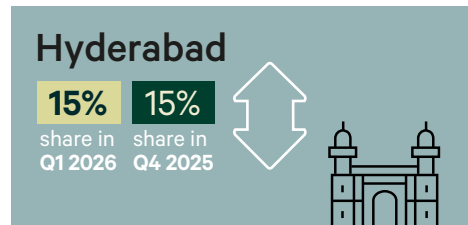
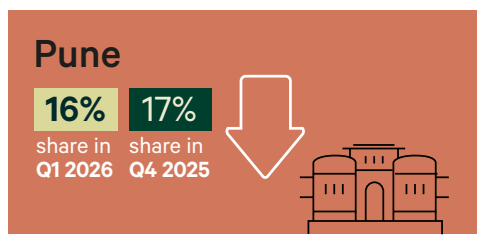
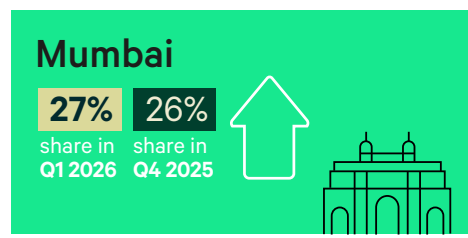
2. The data presented in this report was compiled at the time of report generation and may be revised in subsequent quarters as more information becomes available. Therefore, the data should be considered provisional and subject to ongoing refinement.



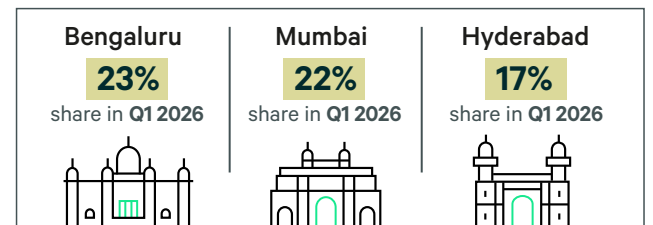
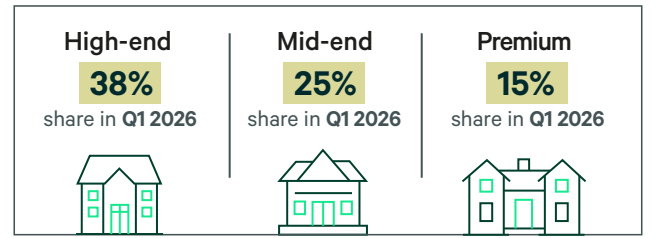
### Categories that drove sales



### Cities that drove sales



### Prevailing trends in unit launches in Q1 2026



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