

5 FAST FACTS

HYDERABAD | Q4 2025



The Need-to-Know for Hyderabad's Commercial Real Estate

1 OFFICE LEASING SURGED; Q4 RECORDED AT 5.42 MSF

Q4 2025 office gross leasing **recorded at 5.42 MSF**, nearly 2X over Q3 and **25% higher YoY**. Full-year leasing reached a **record 12.44 MSF**, led by large deals which **formed 79% of Q4 volumes**, driven by GCCs and IT-BPM occupiers.



2 OFFICE VACANCY TIGHTENED; GRADE A+ REMAINED SUB-10%

Citywide office vacancy **declined to 22.06%**, down 200 bps YoY, supported by **3.91 MSF net absorption in Q4**. Grade A+ assets **remained tight at 9.1% vacancy**, indicating limited availability in prime assets.



3 RETAIL LEASING PICKED UP; Q4 ACTIVITY AT 0.43 MSF

Retail leasing **rose to 0.43 MSF** in Q4, **up ~14% QoQ**, while full-year leasing stood at **~2 MSF**. Main streets **accounted for 85%** of Q4 absorption, while mall leasing **improved to 15%**, reflecting early traction in newly operational malls.



4 RESIDENTIAL LAUNCHES STABLE; WEST ZONE DOMINATED SUPPLY

Residential launches stood at **approximately 10,000 units in Q4**, largely flat QoQ and YoY. The West zone **contributed 76% of launches**, led by Tellapur and Kokapet, while peripheral locations **accounted for ~50% of quarterly supply**.



5 MID-SEGMENT AND HIGH-END CONTINUED TO DOMINATE LAUNCH MIX

Mid-segment and high-end launches together **formed ~95% of Q4 launches**. Mid-segment **led with a 58% share**, concentrated in peripheral locations, while **high-end supply at 37%** remained anchored in core markets, reflecting sustained end-user demand and developer confidence.



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