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India Union Budget 2026: Real Estate Growth And Infrastructure Investment



The India Union Budget 2026 allocates INR 12.2 lakh crore for capital expenditure, focusing on infrastructure and urban connectivity. N. Nagabushana Reddy of NBR Group discusses how high-speed rail corridors and REITs will support the real estate sector. These initiatives aim to improve buyer confidence, enhance suburban living, and support long-term economic stability across major Indian cities.

Every year, we wait for the Budget with a mix of hope and pragmatism. But after listening to Finance Minister Nirmala Sitharaman's speech for 2026-27, I truly feel we are at a turning point. For those of us on the ground in the real estate sector, this is not just about a massive ₹12.2 lakh crore capital outlay, it is about a smarter, more stable way of building India. The Union Budget sends a clear message of stability and long-term economic intent, which is crucial for the real estate sector. The continued emphasis on infrastructure development, urban connectivity, and capital expenditure will have a strong multiplier effect on housing demand and construction activity.

While the industry always hopes for deeper direct incentives for homebuyers, the broader macroeconomic framework created by this Budget is encouraging. Stable interest rates, controlled inflation, and policy continuity will help strengthen buyer confidence, which is the most important driver of real estate growth.

The announcement of high-speed rail corridors is a total game-changer. Connecting Hyderabad, Bengaluru, and Chennai with high-speed passenger systems will literally redraw the map. These "Growth Connectors" will make suburban living a first choice for families, not a compromise. It opens land that was once considered "out of reach" and turns it into vibrant new neighbourhoods.

With the new Infrastructure Risk Guarantee Fund and the move to recycle assets via REITs, the government is giving us the stability we need to dream bigger. At NBR Group, we are ready. We are not just looking at the next quarter; we are looking at the next generation of Indian living.

The Budget reinforces a long-term growth-oriented vision that indirectly strengthens the real estate ecosystem. Increased allocations toward infrastructure, urban mobility, and digital transformation will play a decisive role in shaping future residential demand. Improved connectivity through new metro lines, roads, and transport corridors consistently drives real estate appreciation and faster project absorption.

Additionally, measures that strengthen disposable incomes and encourage entrepreneurship will gradually translate into stronger homebuyer sentiment. We believe the organised real estate segment is well positioned to capitalise on these trends. Projects that focus on sustainable planning, customer-centric design, and timely execution will continue to see robust demand. This Budget sets the stage for steady, responsible, and long-term growth for the entire real estate industry.

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