

BRANDED RESIDENCES MARKET UPDATE



GLOBAL DATA & INSIGHTS
OCTOBER 2025

Presented By:

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Founder

Global Branded Residences

futurehospitality.com

GLOBAL DATA & INSIGHTS
GLOBAL BRANDED RESIDENCES



ABOUT GBR

GLOBAL BRANDED RESIDENCES

Global Branded Residences (GBR) is an independent development consultancy firm, specialising in branded residential development advisory services, worldwide.

We work with the world's leading developers, resorts, private equity firms, hotel and non-hotel brands.

GBR's Services:

- **MARKET STUDIES**
- **PRODUCT & PRICING DEFINITION**
- **BRAND SELECTION & NEGOTIATION**
- **BRAND ADVISORY**
- **BRAND PREMIUM STUDIES**
- **TRANSACTION ADVISORY**

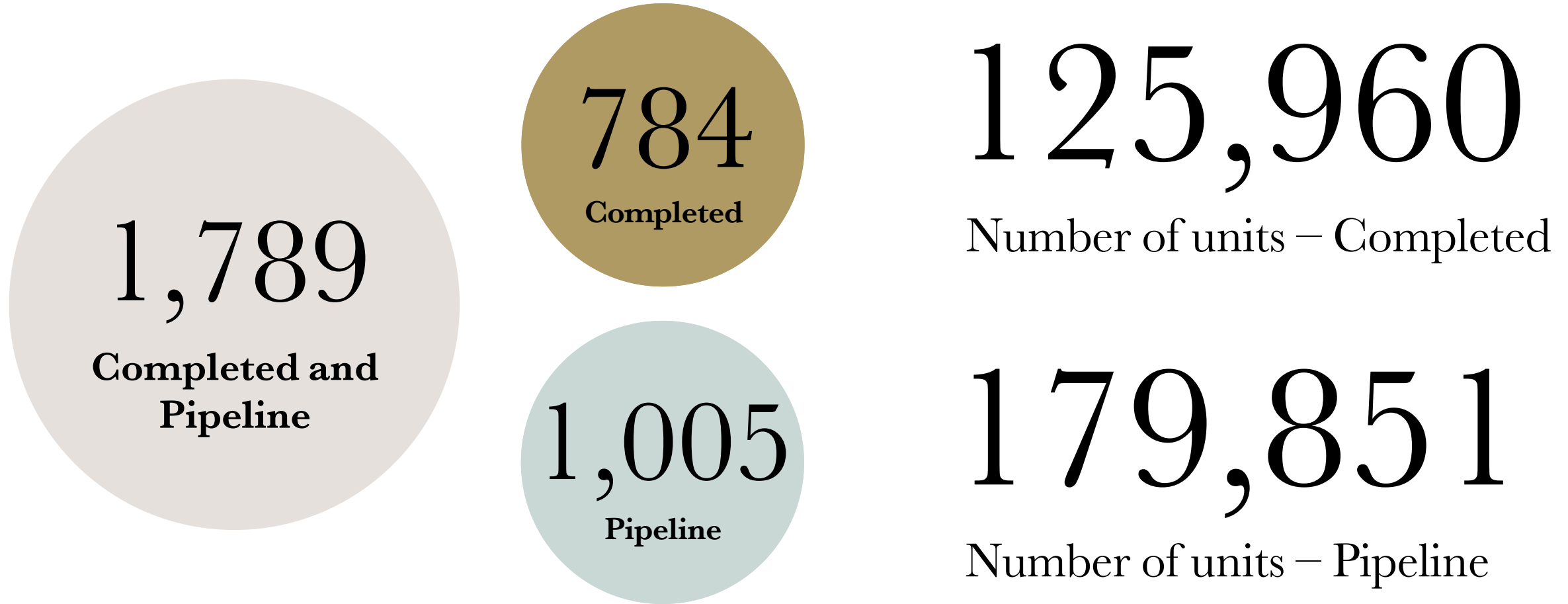


BRANDED RESIDENCES – GLOBAL CONTEXT



GLOBAL BRANDED
RESIDENCES

PROJECTS COMPLETED & PIPELINE

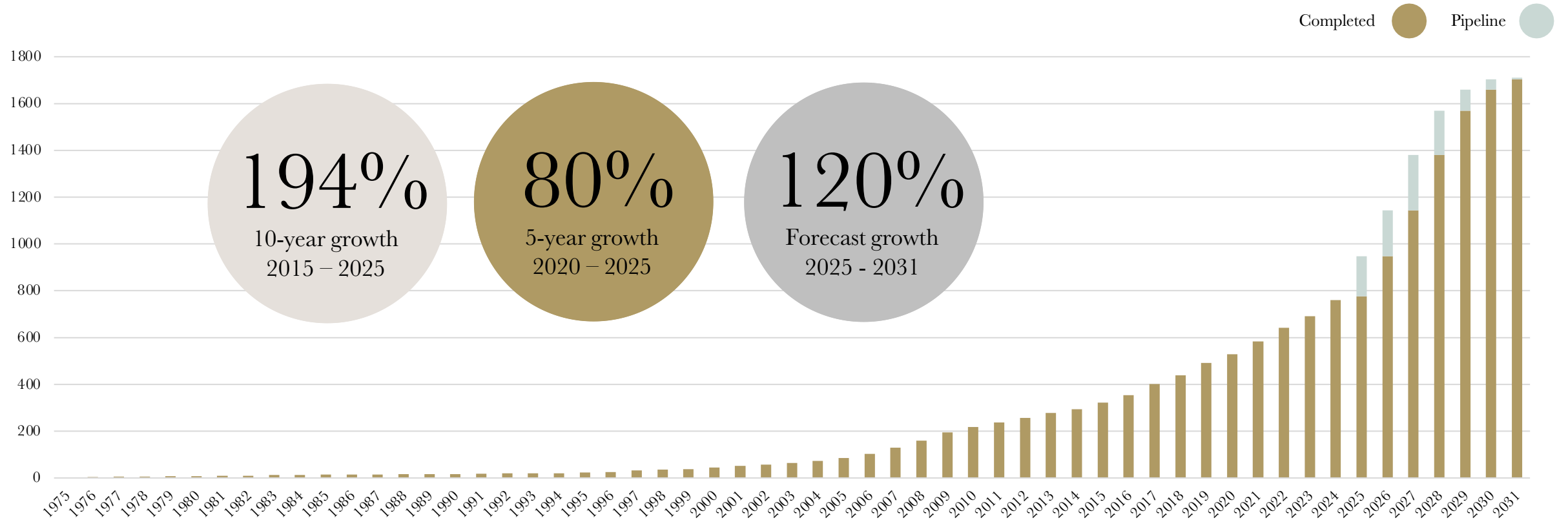


BRANDED RESIDENCES – GLOBAL CONTEXT



GLOBAL BRANDED RESIDENCES

GLOBAL CUMULATIVE GROWTH (1975-2031)



BRANDED RESIDENCES – GLOBAL CONTEXT

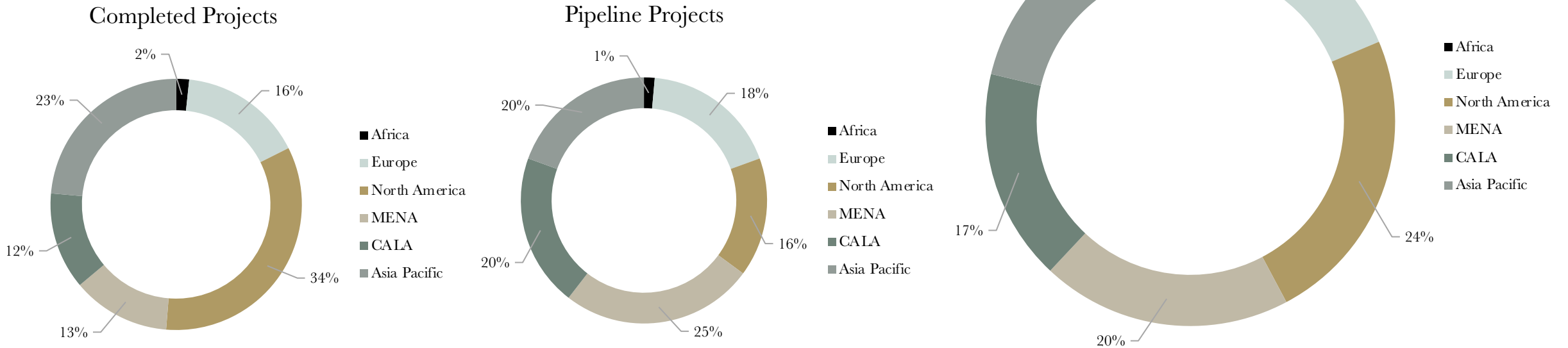


GLOBAL BRANDED RESIDENCES

REGIONAL DISTRIBUTION

- North America is leading in completed projects, followed by APAC.
- Europe, MENA and CALA level in completed projects at 12% - 16%.
- MENA, CALA, and APAC are showing the strongest pipeline growth.
- The result is that APAC will be on par with North America in both completed projects and those in the pipeline.

Total Projects



BRANDED RESIDENCES – GLOBAL CONTEXT

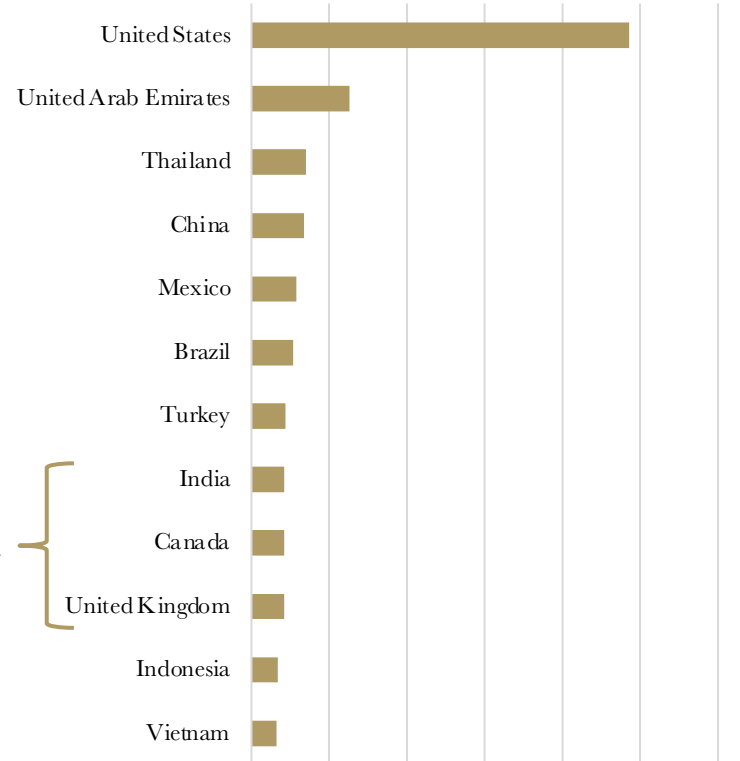


GLOBAL BRANDED
RESIDENCES

TOP 10 COUNTRIES

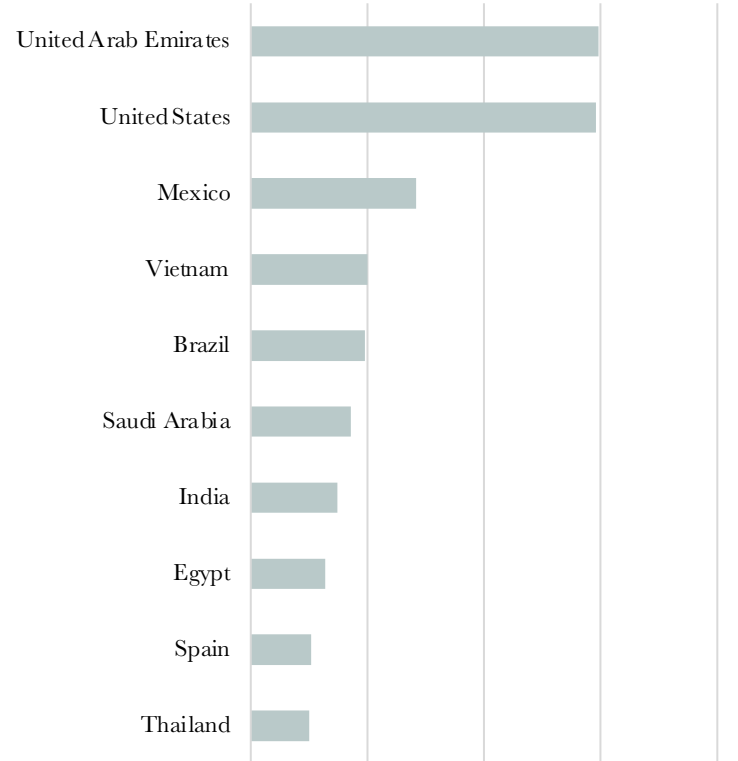
Completed Projects

0 50 100 150 200 250 300



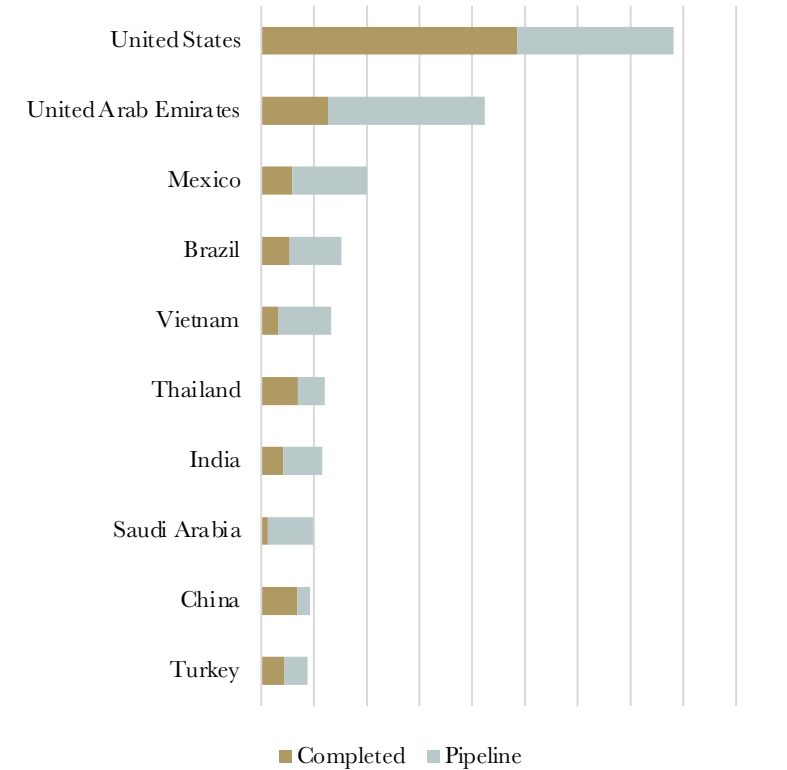
Pipeline Projects

0 50 100 150 200



Total Projects

0 50 100 150 200 250 300 350 400 450



8.



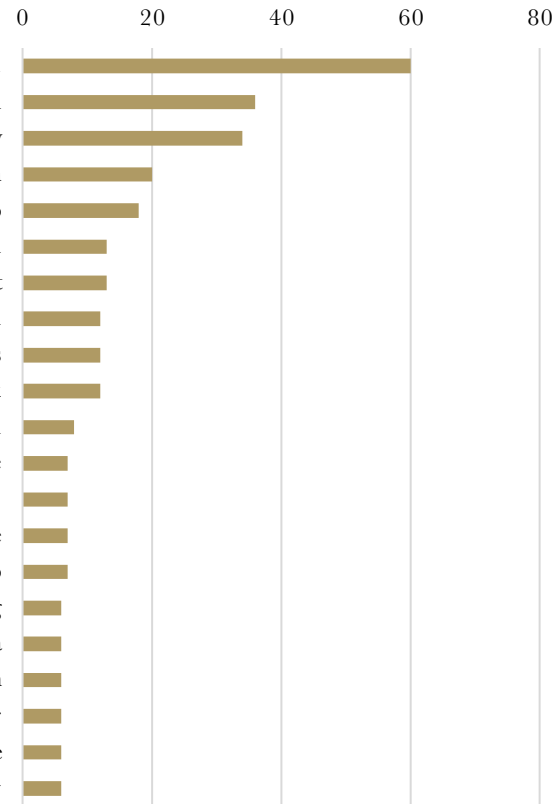
BRANDED RESIDENCES – GLOBAL CONTEXT



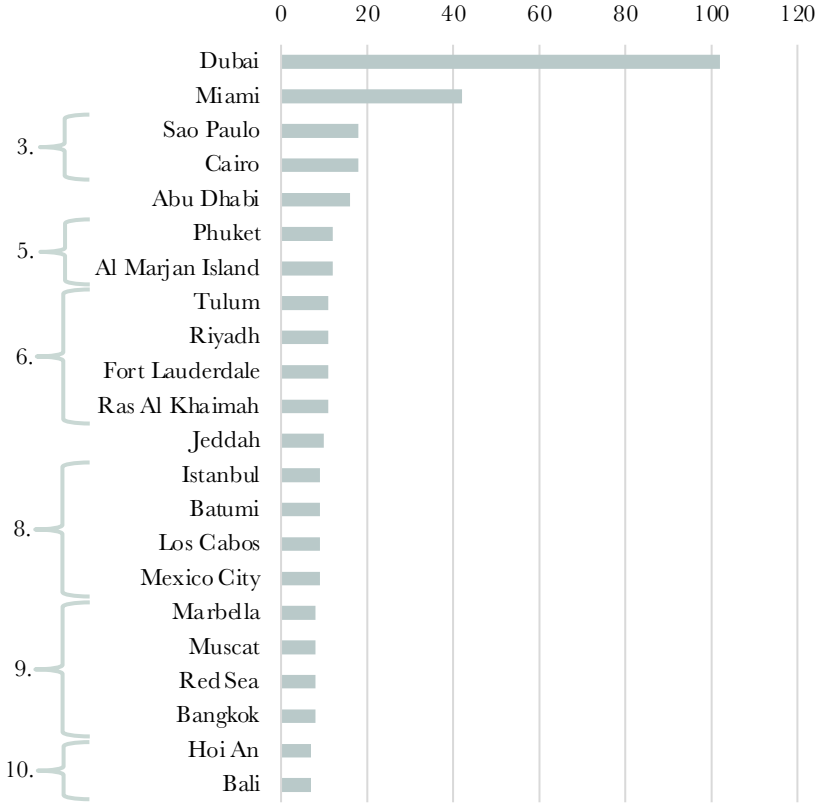
GLOBAL BRANDED RESIDENCES

TOP 10 CITIES

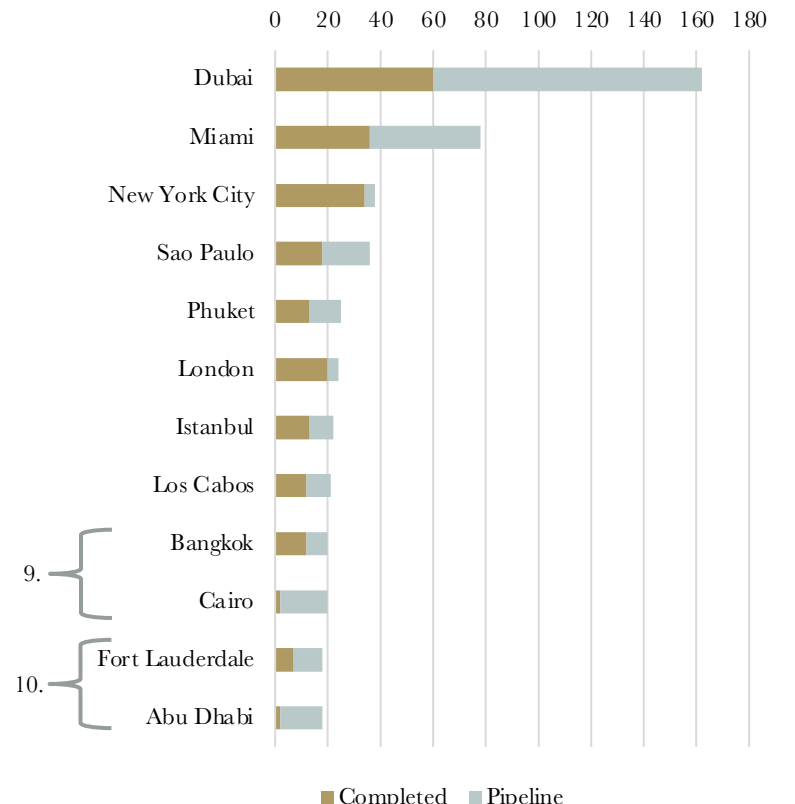
Completed Projects



Pipeline Projects



Total Projects



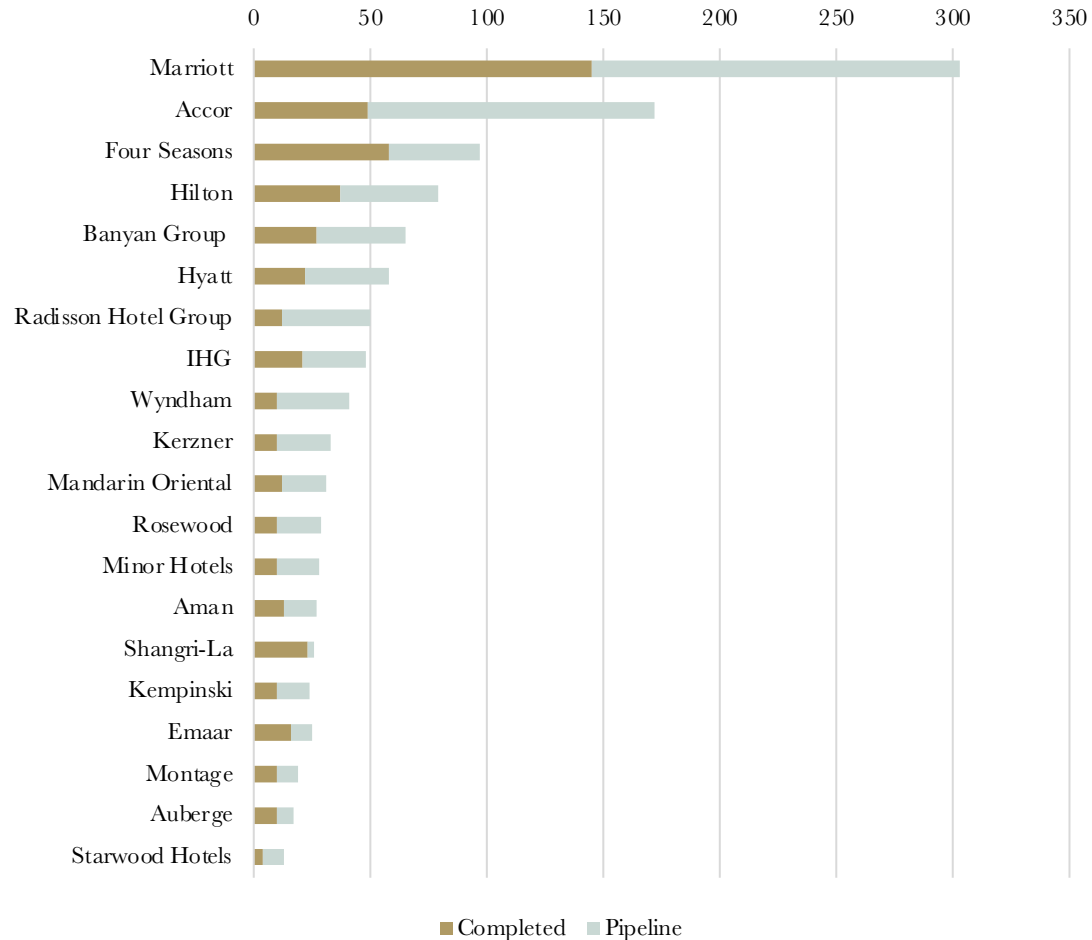
BRANDED RESIDENCES – GLOBAL CONTEXT



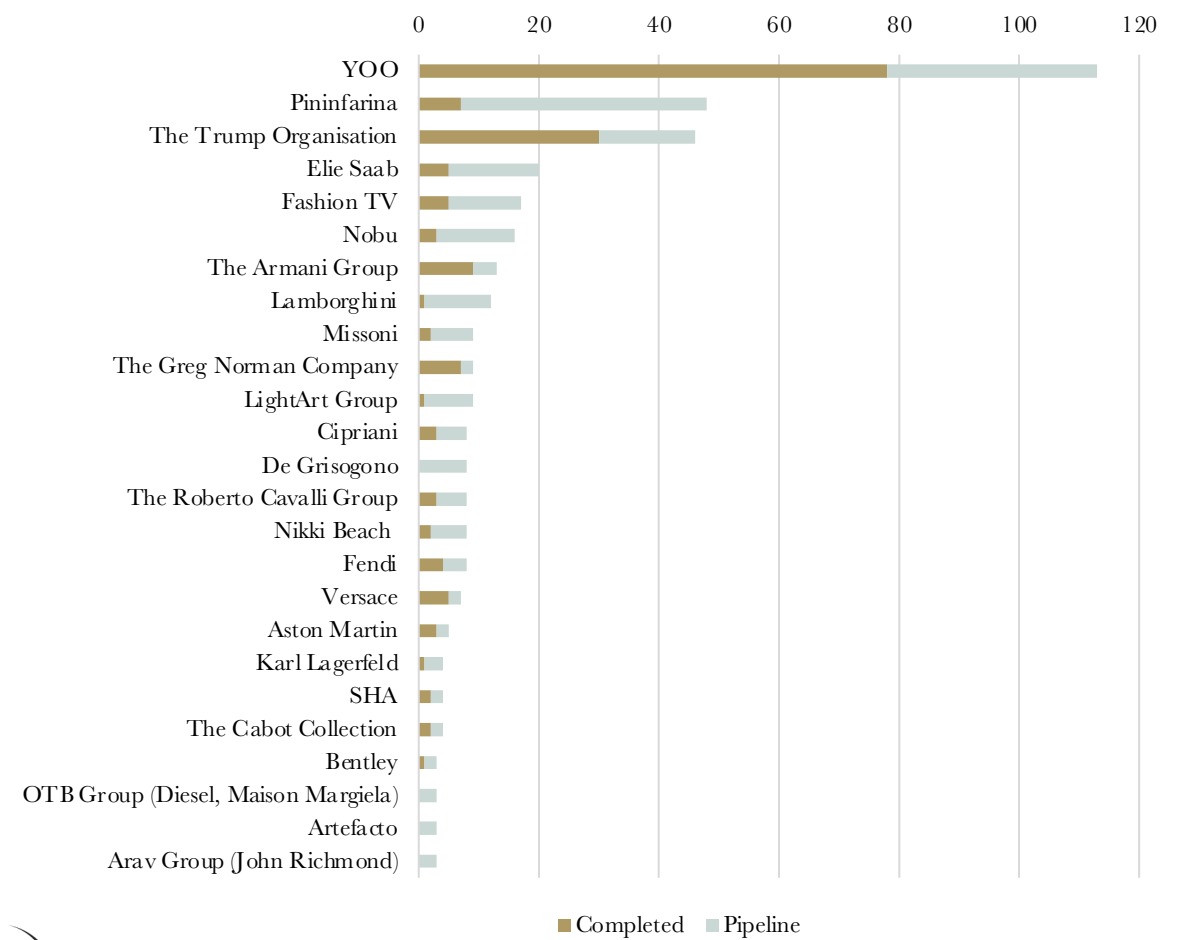
GLOBAL BRANDED RESIDENCES

TOP PARENT BRANDS

HOTEL



NON-HOTEL

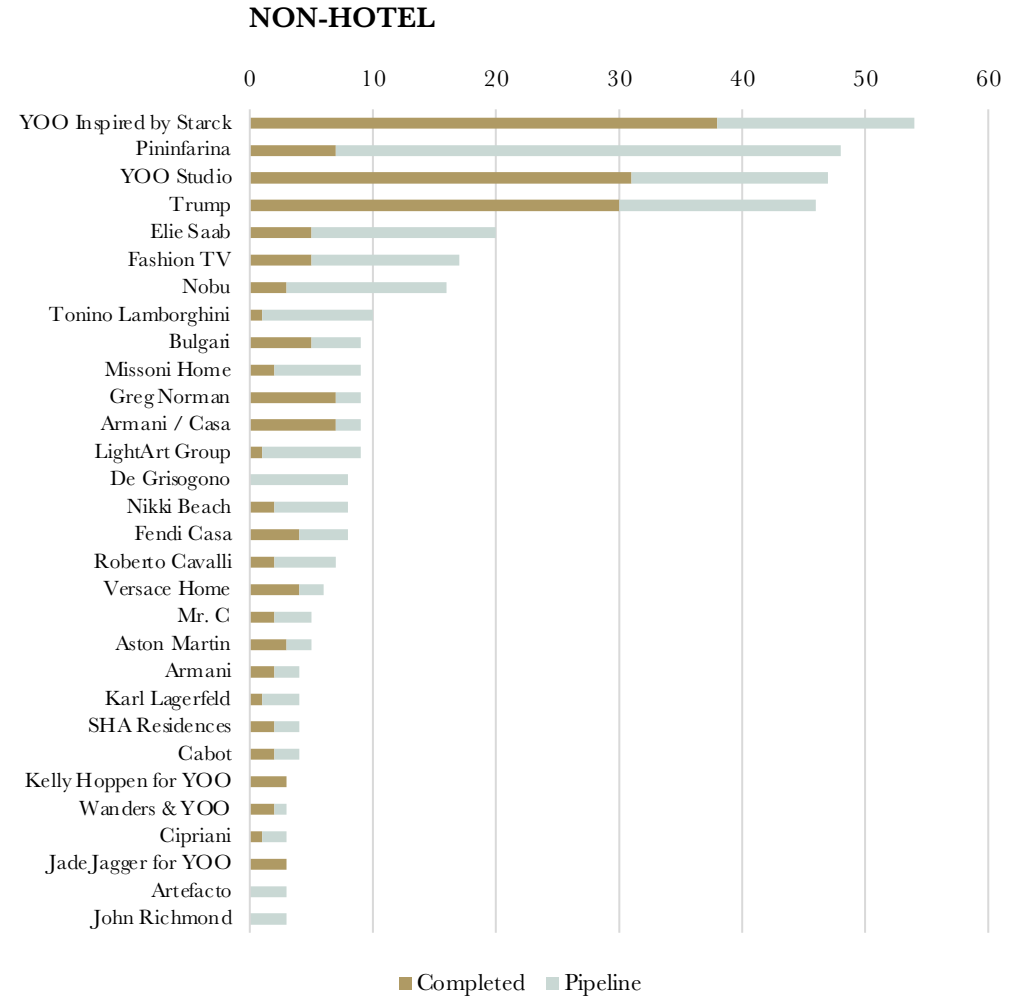
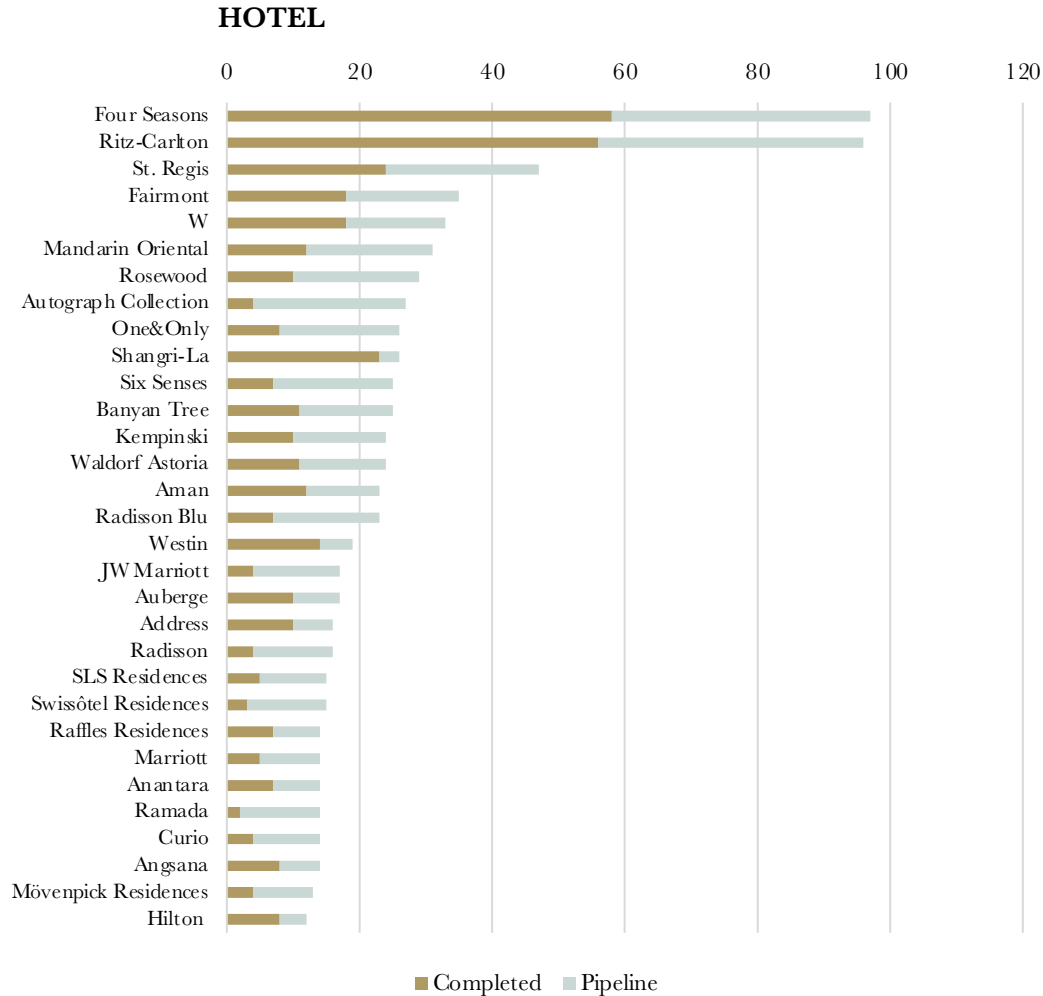


BRANDED RESIDENCES – GLOBAL CONTEXT



GLOBAL BRANDED RESIDENCES

TOP BRANDS

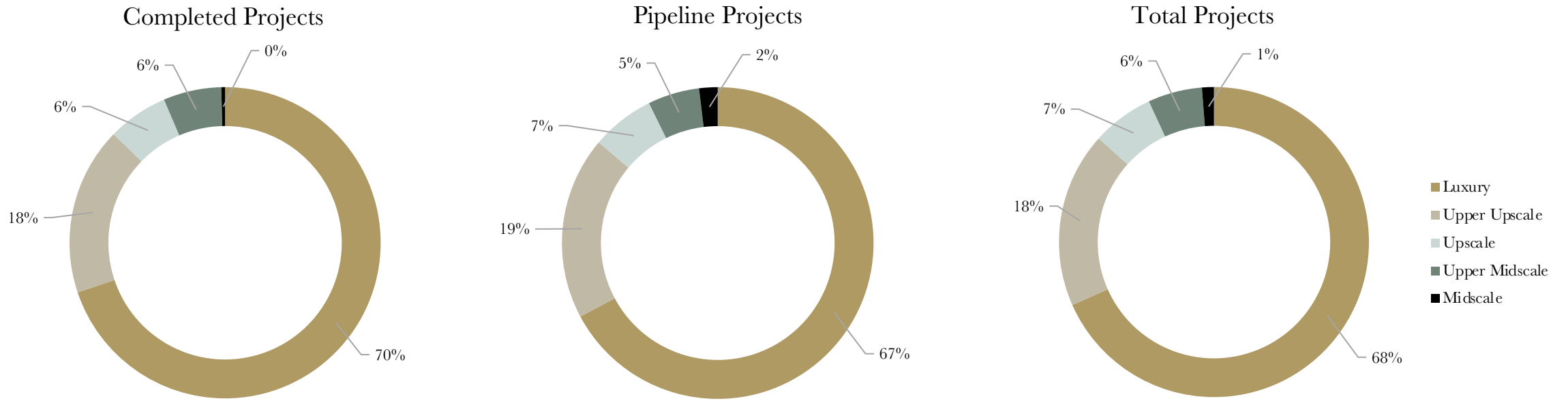


BRANDED RESIDENCES – GLOBAL CONTEXT



GLOBAL BRANDED
RESIDENCES

CHAIN SCALE VARIANCE



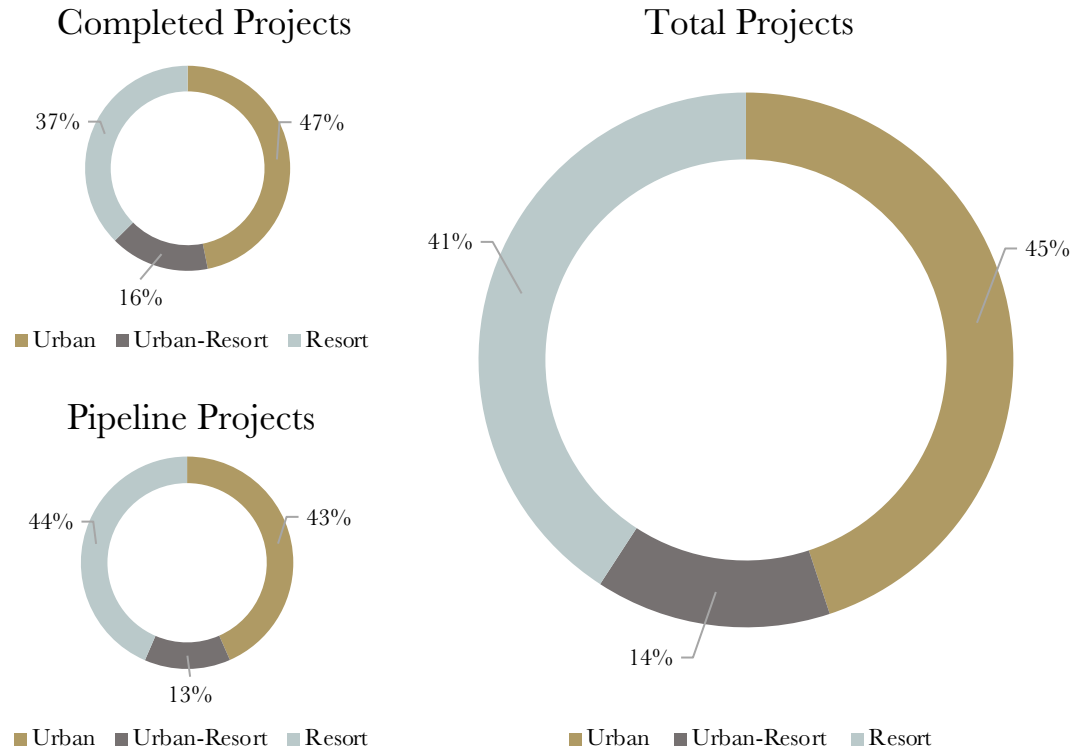
BRANDED RESIDENCES – GLOBAL CONTEXT



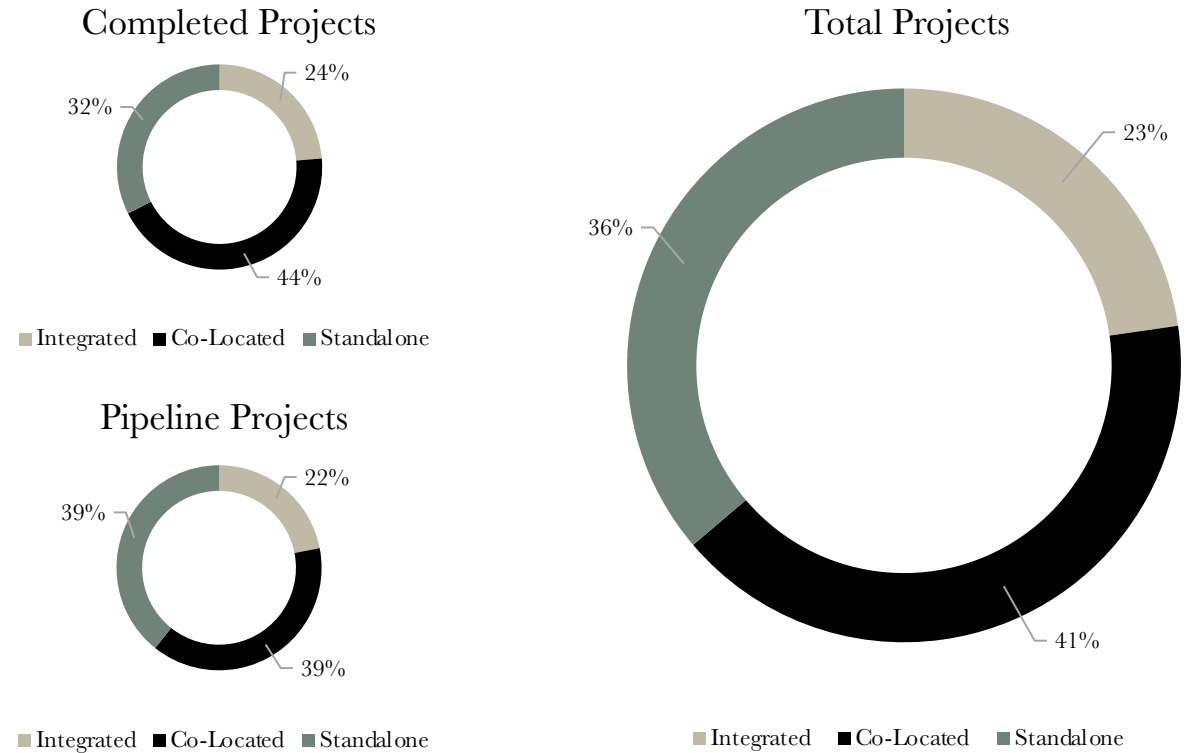
GLOBAL BRANDED RESIDENCES

DEVELOPMENT TYPE

DEVELOPMENT CONTEXT



INTEGRATED VS. CO-LOCATED VS. STANDALONE

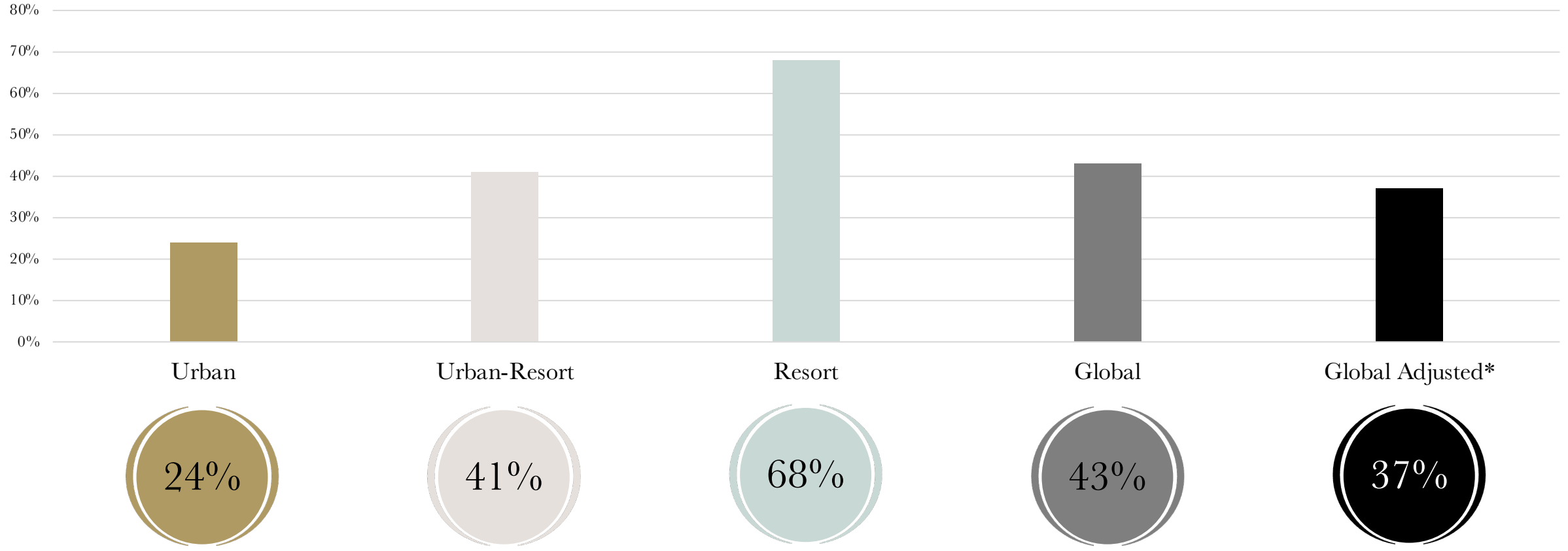


BRANDED RESIDENCES – GLOBAL CONTEXT



GLOBAL BRANDED
RESIDENCES

SALES PREMIUMS





ritani@gbresi.com



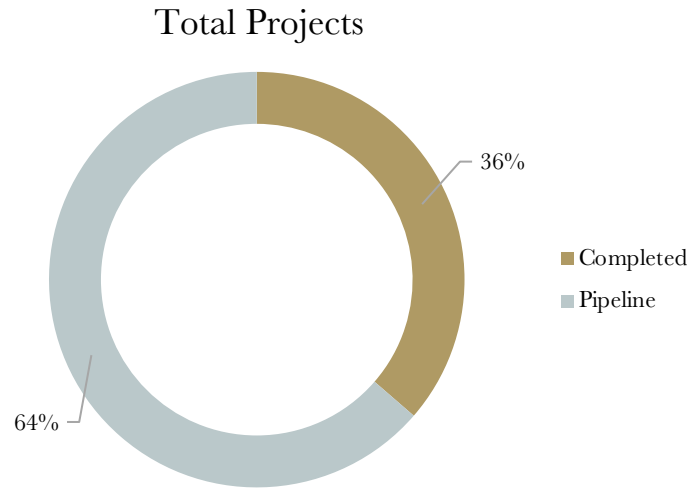
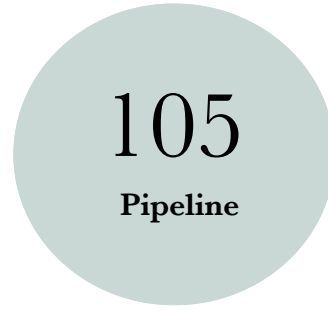
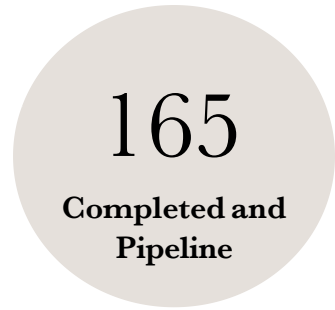
GLOBAL BRANDED
RESIDENCES

BRANDED RESIDENCES – DUBAI



GLOBAL BRANDED RESIDENCES

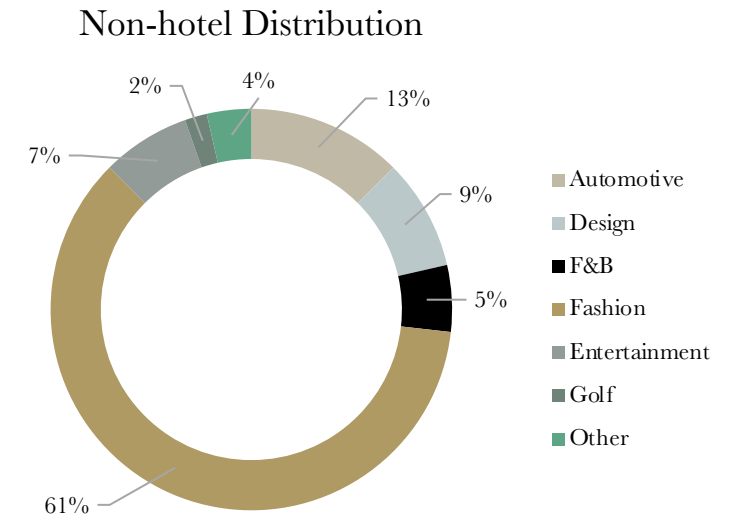
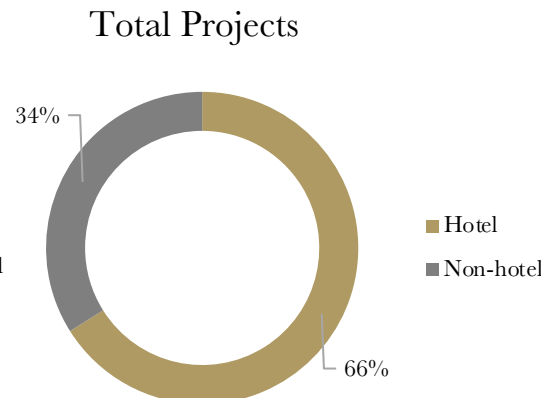
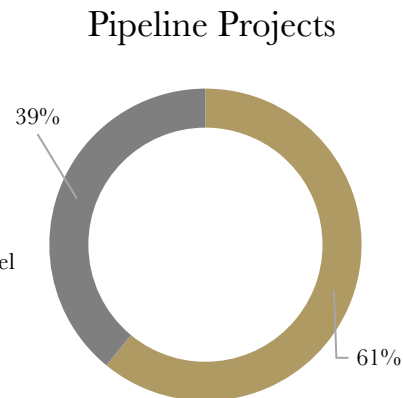
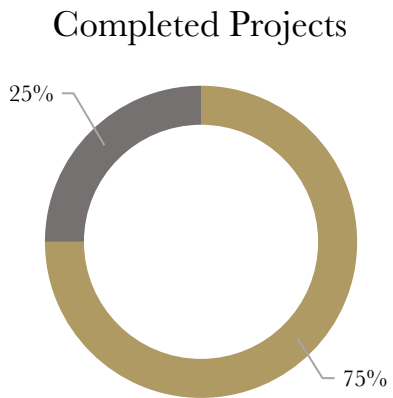
GENERAL OVERVIEW



19,241
Number of units – Completed

29,578
Number of units – Pipeline

BRAND TYPES

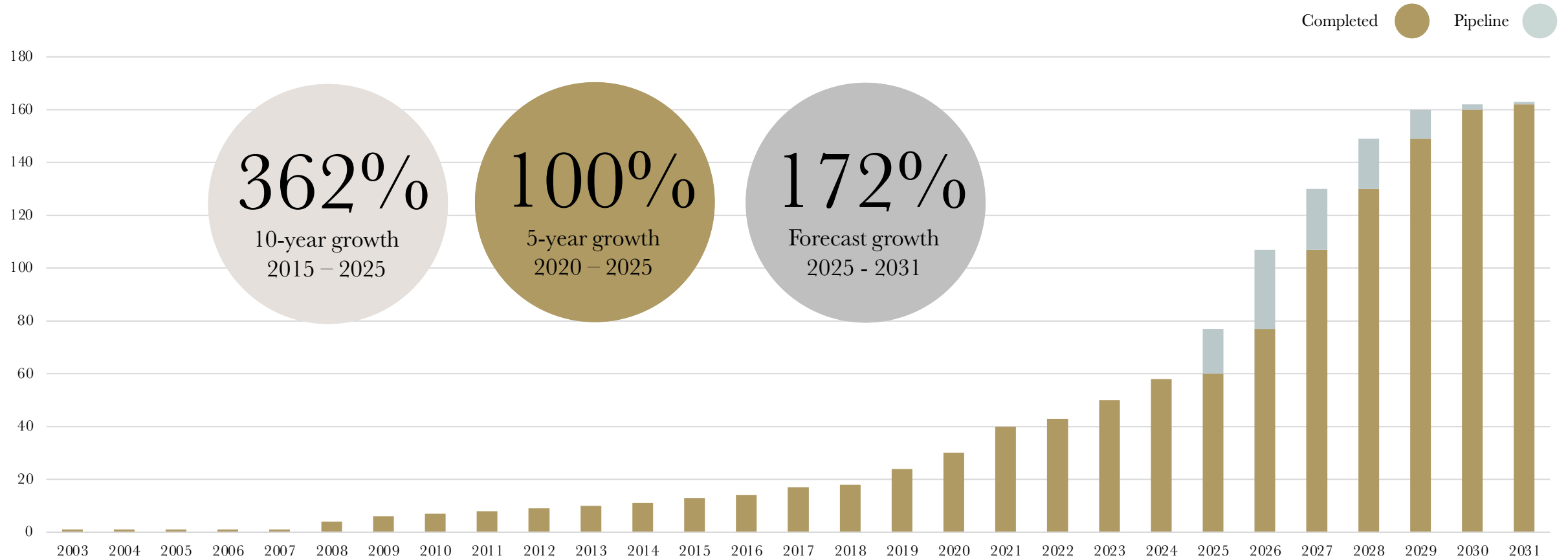


BRANDED RESIDENCES – DUBAI



GLOBAL BRANDED
RESIDENCES

GLOBAL CUMULATIVE GROWTH (2003-2031)



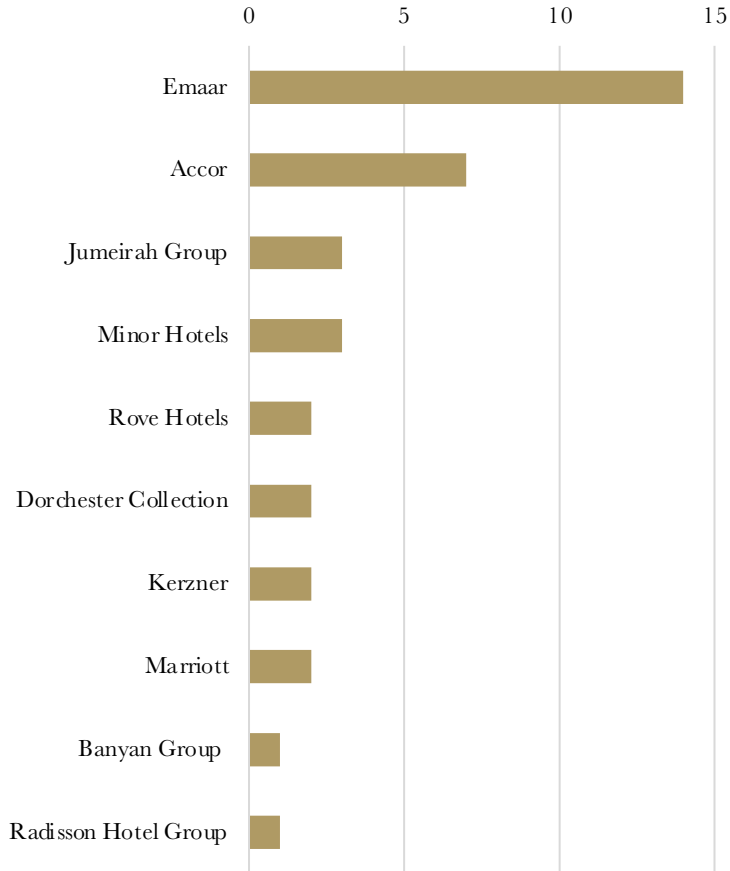
BRANDED RESIDENCES – DUBAI



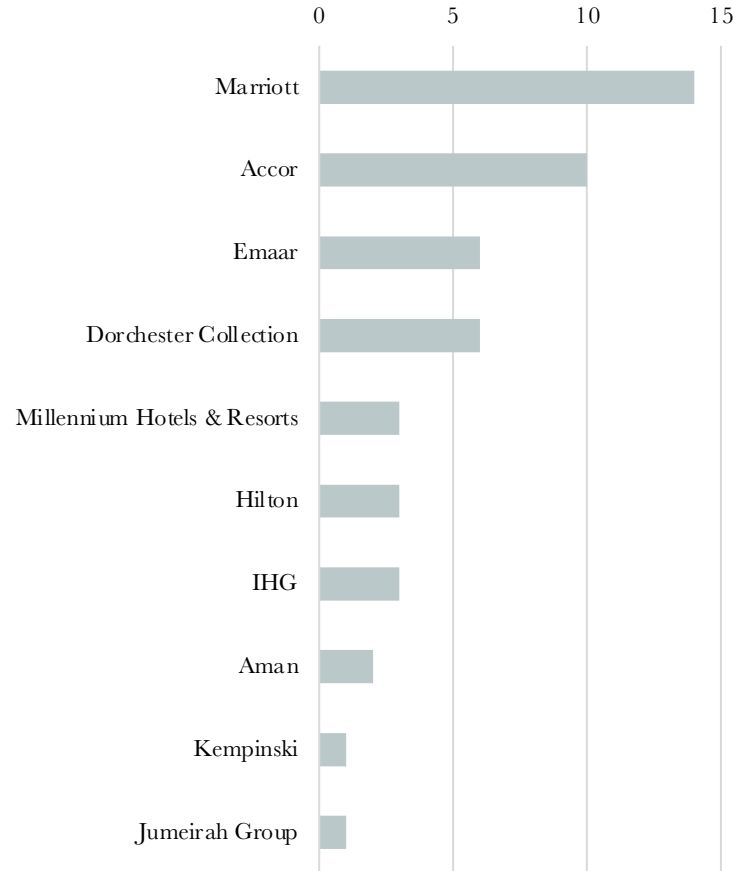
GLOBAL BRANDED RESIDENCES

TOP PARENT BRANDS - HOTEL

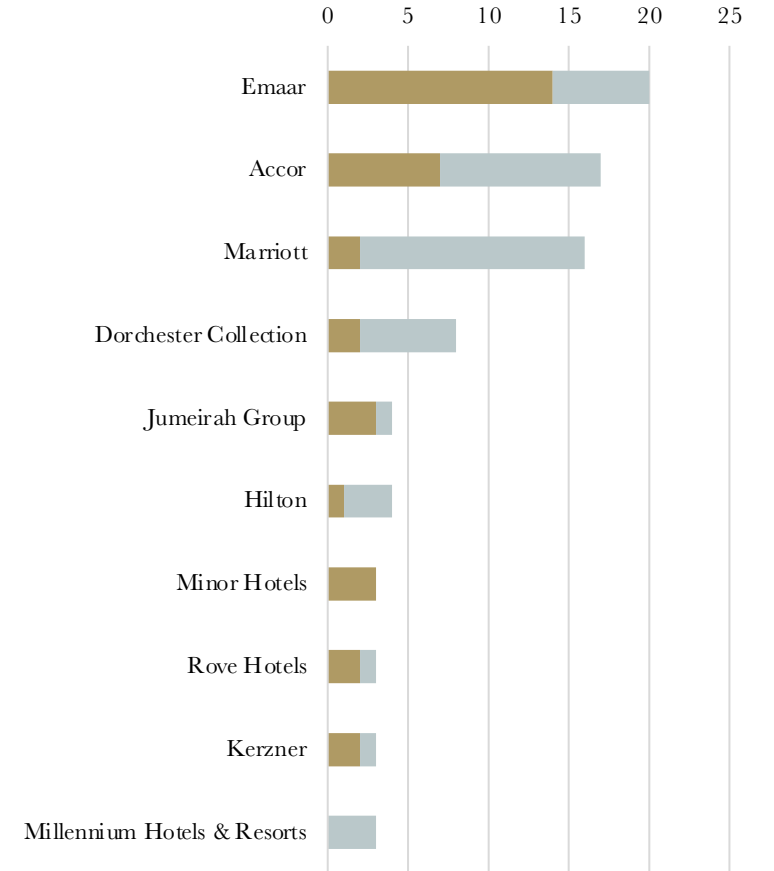
Completed Projects



Pipeline Projects



Total Projects



■ Completed ■ Pipeline

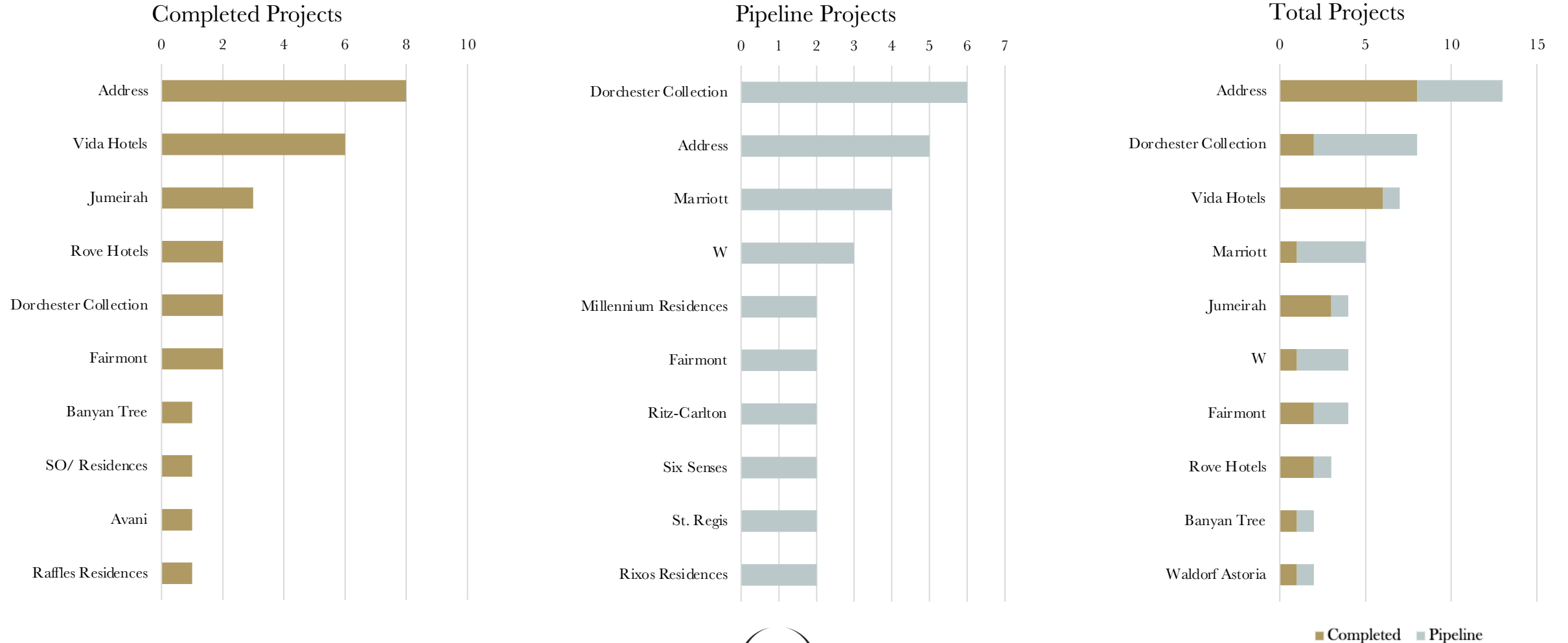


BRANDED RESIDENCES – DUBAI



GLOBAL BRANDED RESIDENCES

TOP BRANDS - HOTEL

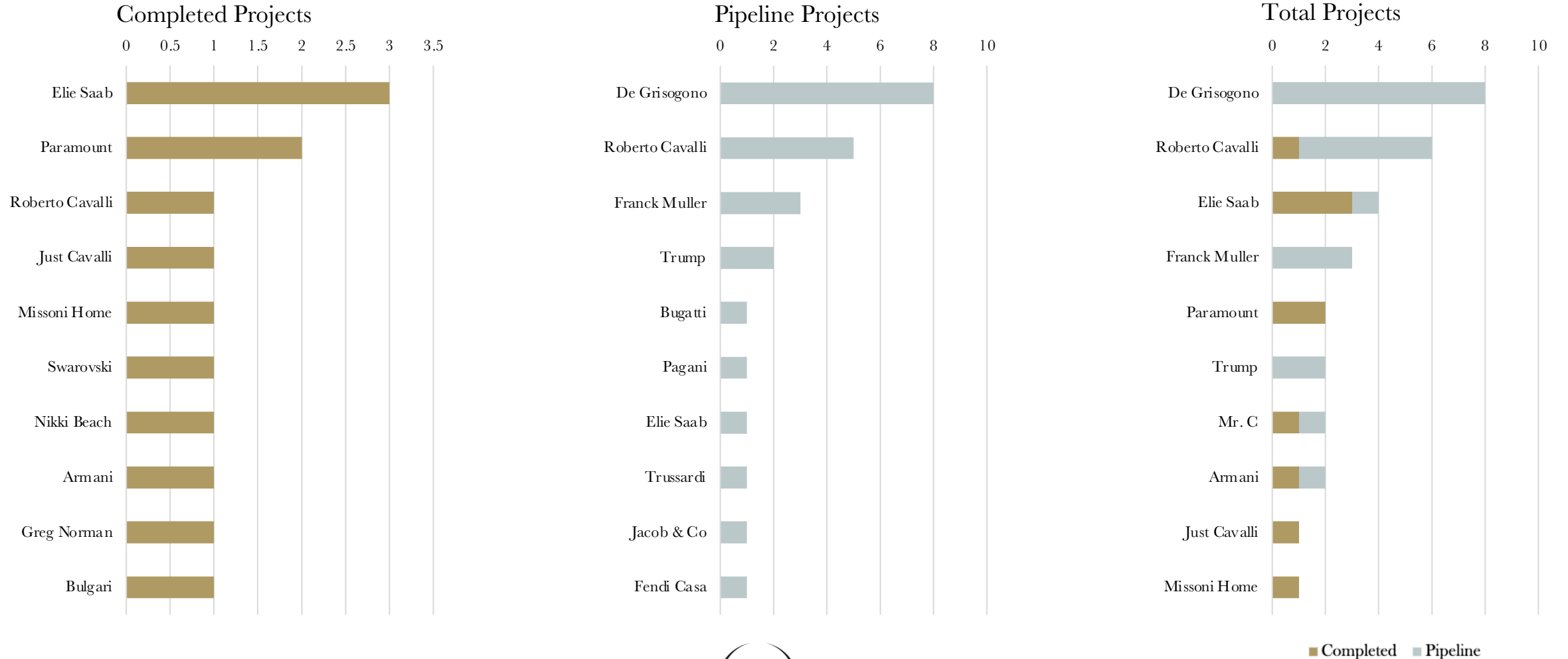


BRANDED RESIDENCES – DUBAI



GLOBAL BRANDED RESIDENCES

TOP BRANDS – NON-HOTEL

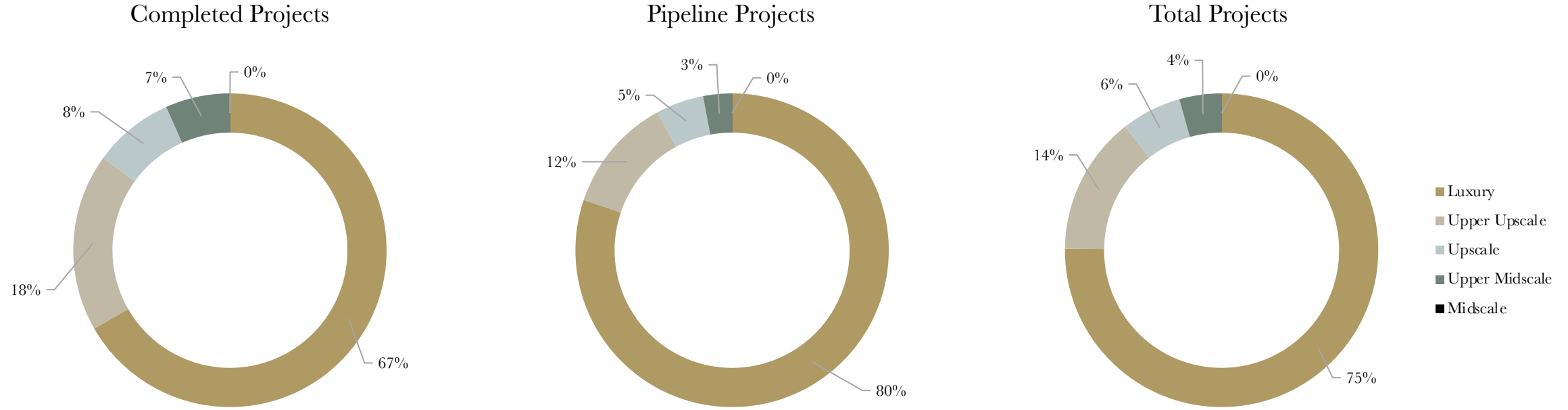


BRANDED RESIDENCES – DUBAI



GLOBAL BRANDED RESIDENCES

CHAIN SCALE VARIANCE



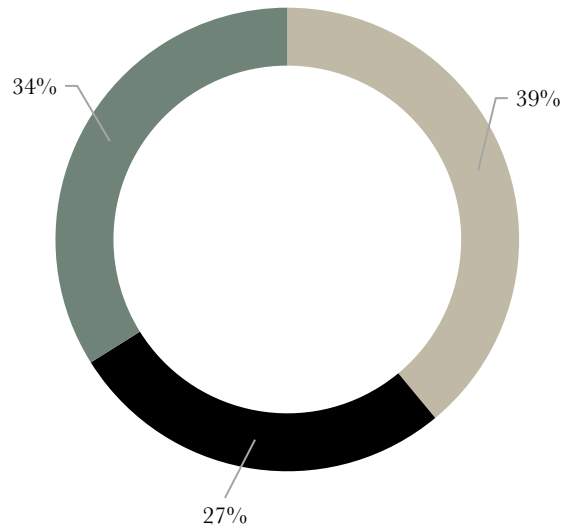
BRANDED RESIDENCES – DUBAI



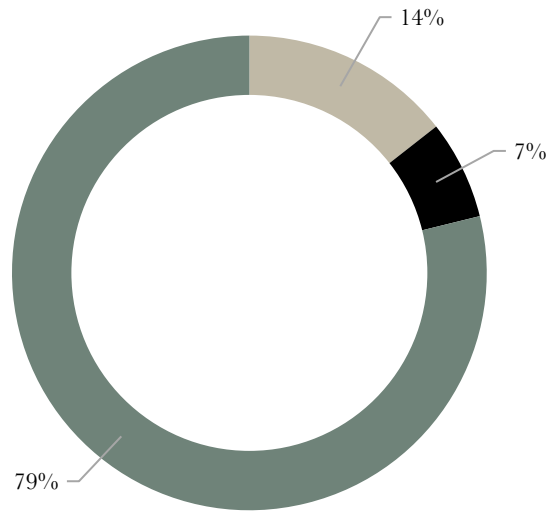
GLOBAL BRANDED
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INTEGRATED VS. CO-LOCATED VS. STANDALONE

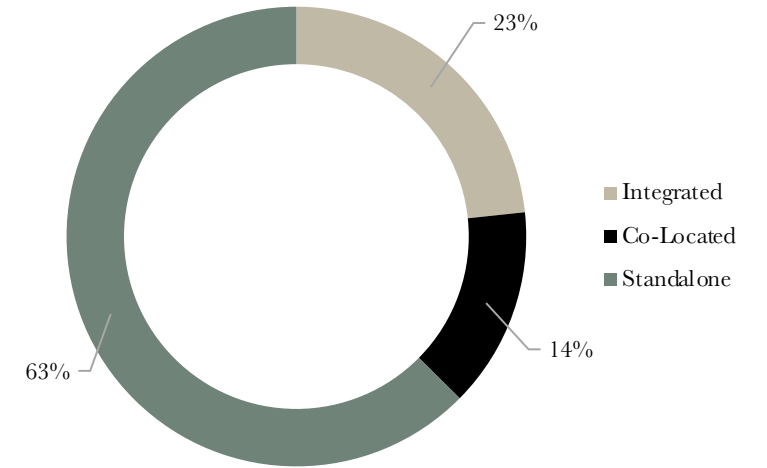
Completed Projects



Pipeline Projects



Total Projects



■ Integrated
■ Co-Located
■ Standalone

