IDRIS DAD

PRIVATE CLIENT PROPERTY INTELLIGENCE · UAE

THE BRANDED RESIDENCES REPORT · 2025

Branded Residences *Dubai vs. The World.*

The fastest-growing category in global luxury real estate — and the one where Dubai has quietly taken the world's number-one position. This is my insider read on why branded residences command the premiums they do, and how to buy into them intelligently.

IDRIS DAD
Elite Independent Property Consultant & Investment Broker

DUBAI · ABU DHABI
Idris Dad

A NOTE FROM IDRIS DAD

The category that *rewrote* luxury.

Branded residences pair a home with a name — a hotel, a fashion house, a marque — and a standard of service that comes with it. Ten years ago this was a niche. Today it's the sharpest end of the luxury market, and Dubai leads the world in it.

In my years navigating Dubai's off-plan and secondary markets, I've watched branded stock behave differently from everything around it. It launches faster, resells easier, and holds a premium that non-branded product in the same building simply cannot touch. The global sector has expanded roughly 160% over the past decade — and Dubai now sits at the front of that pipeline, not the back of it.

What the brochures won't tell you is that the brand on the door is only half the trade. The other half is knowing which projects will actually deliver the premium, and which are borrowing a logo to justify a price. This report maps Dubai's rise, benchmarks it honestly against the rest of the world, and shows you where I'd be paying attention.

Read it as a strategy briefing. When you're ready to separate the genuine assets from the badge-engineering, that's the conversation I have privately with my clients.

— Idris Dad

INSIDE THIS REPORT

SECTION 01 · THE NUMBERS

Key takeaways.

Strip the marketing away and the branded-residences story comes down to a handful of figures. Here are the ones I actually weight.

140+

Branded-residence launches targeted in Dubai by 2031. The deepest pipeline in the world.

40%

Average price premium branded units command over non-branded stock in the same locality.

25%

Share of the global branded market the MENA region is set to hold by 2030 — Dubai leading.

The trend *goes beyond hotels.*

The category was built by hospitality names, but the growth now comes from elsewhere. Automotive marques like Bugatti and Mercedes-Benz, and fashion houses like Armani, are attaching their names to homes — shifting the whole proposition from hotel-led service to lifestyle-led living.

Dubai *outperforms global rivals.*

On the metrics that matter to an investor, Dubai wins the comparison: more affordable entry than Miami, a friendlier tax position than London, and higher growth potential than Phuket. That combination is rare, and it's why capital keeps rotating in.

WHAT THIS MEANS FOR YOU

A 40% premium is only worth paying when the brand is genuinely accretive to resale and yield. Knowing which projects clear that bar — and which don't — is precisely the due diligence I run before a client commits.

SECTION 02 · THE SHIFT

The new identity of *luxury living.*

Branded residences were once the near-exclusive territory of hotel groups. Today automotive, fashion and lifestyle names have moved in — and that changes what you're actually buying.

When I consult with international investors on this category, I frame it as three distinct tiers of brand. Each sells a different promise, and each behaves differently on resale. The hospitality names sell service. The automotive marques sell engineering and exclusivity. The fashion houses sell identity and design. Understanding which promise your buyer or tenant is paying for is the whole game.

HOSPITALITY	AUTOMOTIVE	FASHION / LIFESTYLE
Ritz-Carlton	Bugatti	Giorgio Armani
Four Seasons	Mercedes-Benz	Missoni
Six Senses	Aston Martin	Cipriani
St. Regis	Bentley	Louis Vuitton

> *The hotel brands taught the market to pay for service. The fashion and automotive names taught it to pay for identity. Dubai is the one city where all three are launching at scale simultaneously.*

THE LIFESTYLE-LED PREMIUM

A move from hotel-led to lifestyle-led projects is not cosmetic. Lifestyle brands tend to command stronger emotional pricing and a more design-loyal buyer — which, in the right location, translates into a more resilient premium on exit.

SECTION 03 · THE EDGE

Why Dubai *leads.*

Dubai became the world's branded-residences capital for structural reasons, not marketing ones — progressive policy, visionary developers, prime land, and a steady inflow of migrating millionaires.

With strong yields, solid capital appreciation, and world-class branded amenities delivered by globally recognised names — often at more accessible prices than other major hubs — Dubai's branded stock sells faster and resells more easily than its global peers. That liquidity is the quiet advantage most reports underweight.

100%
FOREIGN OWNERSHIP

0%
PERSONAL INCOME TAX

10-Yr
GOLDEN VISA

Sales *soar.*

Investors in Dubai are paying, on average, a 40% premium per square foot for branded property over non-branded counterparts in the same area — and transaction values have climbed accordingly. The record H1 2025 value figure tells the story.

Transaction Value — branded segment (AED Billion)

Transaction Volume — branded segment (units)

HOW I READ IT

Rising value on cooling volume in H1 2025 is a quality signal, not a weakness — bigger tickets, more selective buyers. That's the branded segment maturing, and it favours the disciplined investor over the crowd.

SECTION 04 · BRAND POWER

Dubai's premiums *vs. the world.*

The clearest way to judge a market is the premium branded stock commands over its own non-branded neighbours. Here's Dubai measured against the leading global peers — price per square foot, branded vs. non-branded.

MARKET · PROJECT	NON-BRANDED	BRANDED	PREMIUM
Dubai · Bugatti Residences	2,042	6,088	**+198%**
Dubai · Armani Beach Residences	3,359	7,786	**+132%**
Dubai · Mercedes-Benz Places	2,925	6,782	**+132%**
Miami · Aston Martin Residences	3,829	9,922	**+159%**
Miami · Mercedes-Benz Places	2,691	7,593	**+182%**
London · Twenty Grosvenor Sq.	10,005	20,874	**+109%**
Spain · Mandarin Oriental Res.	2,523	8,000	**+217%**
Phuket · Banyan Tree Residences	1,750	5,600	**+220%**
Singapore · Pullman Residences	4,815	11,229	**+133%**
Portugal · Viceroy Residences	1,850	4,273	**+131%**

Figures are price per square foot in local benchmark terms, indicative and drawn from publicly available market data. Premiums vary by unit, view, and floor.

What the raw premiums hide is the *entry point*. London's branded product may show a healthy premium, but you're buying it at ~AED 20,000+ psf. Dubai delivers marquee names — Bugatti, Armani, Mercedes-Benz — at a fraction of that absolute price, which is exactly why it resells faster and draws a deeper global buyer pool. High premium on a low base is the most investable combination in this table.

> *The number that matters isn't the premium in isolation. It's the premium relative to your entry price and your realistic exit. Dubai wins on that ratio more often than any market I track.*

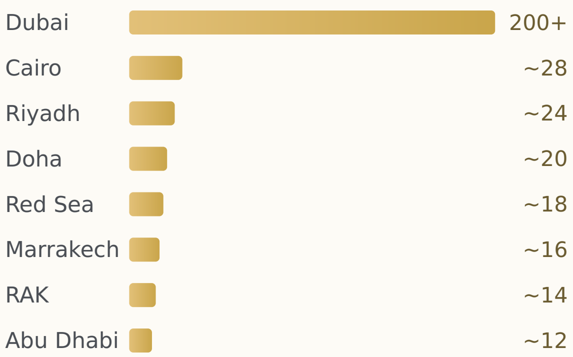
SECTION 05 · THE STANDING

Where Dubai *ranks.*

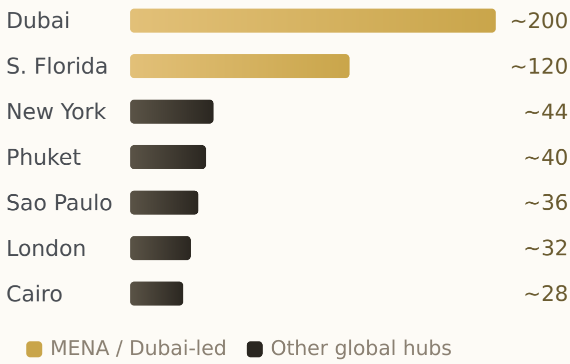
Dubai doesn't just participate in this category — it dominates its region and holds its own against every global hub. The pipeline data makes the lead impossible to argue with.

Dubai remains the top hotspot in the MENA region, with 60+ completed branded projects and a pipeline far deeper than any rival. Regionally it leads by a wide margin; globally it stands shoulder to shoulder with South Florida, New York, and the established Asian hubs.

MENA region — branded projects (completed + pipeline)



Leading global cities — branded projects



The *2030 picture.*

Branded residences have surged roughly 160% globally over the past decade. By 2030 the worldwide pipeline is projected to reach around 1,400 developments — with the MENA region expected to claim about 25% of that total, roughly 360 projects. As the region's front-runner, Dubai is positioned to lead that charge.

Figure · Projected global branded-residence stock (developments)

SECTION 06 · THE PIPELINE

Under development *in Dubai.*

These are the marquee branded projects shaping Dubai's next handover cycle. I track every one of them — construction progress, developer track record, and the gap between launch price and realistic resale.

Bugatti Residences

LOCATION	HANDOVER
Business Bay	2026

Mercedes-Benz Places

LOCATION	HANDOVER
Business Bay	2026

Kempinski Residences

LOCATION	HANDOVER
Dubai Creek	2026

Armani Beach Residences

LOCATION	HANDOVER
Palm Jumeirah	2027

Tonino Lamborghini Residences

LOCATION	HANDOVER
Nad Al Sheba	2027

Six Senses Residences

LOCATION	HANDOVER
Dubai Marina	2028

MY FILTER ON BRANDED OFF-PLAN

A prestige name does not guarantee a prestige return. Before I place a client, I test the developer's delivery record, the true branded premium versus the surrounding community, the service-charge structure the brand carries, and the realistic resale pool at handover. That discipline is what separates a trophy from a trap.

WHAT THIS MEANS FOR YOU

The best allocations in this list are already tightening. Early, structured access — at the right entry terms — is where the real premium is captured, and it's exactly what I secure for private clients.

WORK WITH ME · PRIVATE CLIENT

Buy the badge *that actually pays.*

Branded residences are the most compelling — and the most misunderstood — category in Dubai real estate. The premiums are real, but so is the gap between the projects that earn them and the ones that merely borrow a logo. My work is to keep you firmly on the right side of that line.

Book a private, one-on-one strategy session with me directly. I'll give you an honest read on whether a branded allocation fits your objectives, which specific projects justify their premium, and how to structure the entry for the strongest possible exit.

BRANDED DUE DILIGENCE

An honest assessment of which projects genuinely earn their premium — and which don't.

PRIVATE OFF-PLAN ACCESS

Early, structured entry into the marquee branded launches before allocation tightens.

PORTFOLIO STRUCTURING

Entry terms, yield, and resale mapped to your objectives — with residency built in.