

PRIME
by Betterhomes



BRANDED RESIDENCES

Dubai vs The World



EXECUTIVE SUMMARY

Branded residences are reshaping the landscape of global luxury real estate by blending high-end living with the prestige of internationally renowned brands. Dubai has established itself as the global capital for branded residences, spearheading a remarkable 160% growth in this sector over the past decade. This research investigates the evolution and premium pricing of branded residences in Dubai, provides comparative insights with key international markets, and explores emerging trends that are set to influence the future of this dynamic segment.

KEY TAKEAWAYS

Dubai dominates with a **160%** growth in branded residences, leading the global market with over **140** projects being delivered by **2031**.

Branded homes command a **40% to 60%** premium, as buyers are attracted by luxury appeal and strong investor benefits.

The trend goes beyond hotels, with automotive brands like Bugatti, fashion names like Armani, and entertainment labels shaping the future of luxury living.

Dubai outperforms global rivals, it is more affordable than Miami, more tax friendly than London, and offers a higher growth potential than Phuket.

Branded residences in the MENA region are set to reach **25%** market share by **2030**, with Dubai leading the charge.

THE NEW IDENTITY OF LUXURY LIVING

Branded residences represent a fusion of luxury real estate and globally recognised brands, providing residents with exclusive access to exceptional services and carefully curated lifestyle. While the sector was initially dominated by prestigious hospitality names such as Four Seasons and Ritz-Carlton, it has since evolved to encompass a broader range of brands including automotive marques like Mercedes-Benz, Bentley, and Bugatti; fashion houses such as Armani and Missoni; and entertainment giants like Cipriani. This diversification signals a wider shift towards lifestyle-centric luxury real estate that redefines conventional notions of homeownership.



BRANDED RESIDENCES | WHY DUBAI LEADS



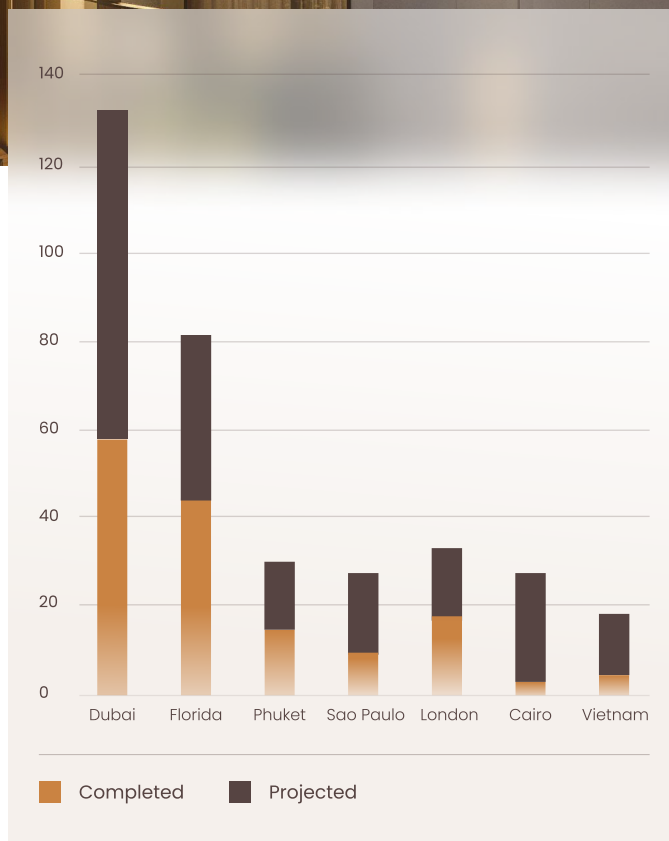
Strategic Edge

Dubai's emergence as the epicentre of branded residences is driven by a strategic blend of progressive government policies, visionary developers, and exceptional locations. The city offers a highly attractive regulatory environment, featuring 100% foreign ownership, zero income tax, and long-term Golden Visas for investors all of which significantly enhance its appeal to high-net-worth individuals (HNWIs) from around the globe.



Sales Soar

In 2024, Dubai recorded the sale of over 13,000 branded residences, a 43% increase on the previous year generating a transaction value of AED 60 billion. This figure represents 8.5% of the total real estate transaction value, highlighting the sector's growing prominence. With 140 branded real estate projects scheduled for completion by 2031, Dubai continues to lead the EMEA region as the premium market for branded residences, whether in terms of completed developments or those in the pipeline. Investors and buyers are willing to pay, on average, a 40%–60% premium per square foot for branded properties over their non-branded counterparts in the same locality, underscoring both their perceived value and enduring appeal.



Source: Betterhomes Research. Figure 1. Branded Projects Hotspots





Brand Power

Developers such as Binghatti (Bugatti Residences), Arada (Armani Beach Residences), and Select Group (Six Senses Residences) have established strategic partnerships with globally recognised brands, significantly enhancing the prestige and marketability of their developments. Meanwhile, master developers including Emaar, Meraas, and Nakheel have created iconic, brand-centric enclaves that have come to define Dubai's luxury property landscape. The city's unique blend of regulatory advantages, innovative brand collaborations, and exceptional real estate locations has firmly positioned it ahead of global competitors such as Miami, New York, and Phuket

Region	Project Name	Brand Partner	Location	Non-Branded	Branded	Premium	Handover
Dubai	Bugatti Residences	Bugatti x Binghatti	Business Bay	1,782	6,000	237%	2026
	Mercedes-Benz Places	Mercedes-Benz x Binghatti	Downtown Dubai	2,503	8,000	220%	2026
	Armani Beach Residences	Armani x Arada	Palm Jumeirah	6,420	9,000	40%	2026
	Bvlgari Residences	Bvlgari	Jumeirah Bay Island	3,953	10,500	166%	2017
	Burj Binghatti	Jacob & Co	Business Bay	1,782	4,000	124%	2026
Europe	The OWO Residences	Raffles	London, UK	8,000	20,000	150%	2023
	Twenty Grosvenor Square	Four Seasons	London, UK	5,000	19,000	280%	2026
	Design Hills by Dolce & Gabbana	Sierra Blanca Estates	Spain	2,000	11,000	450%	2026
	Tierra Viva by Lamborghini	Dar Global	Spain	2,000	11,000	450%	2027
	Viceroy Residences	-	Portugal	3,500	7,000	100%	2025
	CostaTerra Golf & Ocean Club	-	Portugal	3,500	9,000	157%	2024
USA	Aston Martin Residences	G&G Developers	Miami, Florida	4,000	25,000	525%	2024
	Cipriani Residences	Mast Capital	Miami, Florida	4,000	21,000	425%	2028
	Mercedes-Benz Places	JDS Development	Miami, Florida	4,000	25,000	525%	2027
Thailand	Mandarin Oriental Residences	Mandarin Oriental	Bangkok	2,000	7,000	250%	2019
	Banyan Tree Residences	-	Phuket	2,500	9,000	260%	2026
	One Bangkok	-	Phuket	2,000	8,000	300%	2030

Source: Property Monitor, Knight Frank, Betterhomes Research

In AED, Figure 2. Dubai Buyers leading Global Markets with an Average Premium of **157%** for Branded Residences, Followed by Europe at **265%**, Thailand at **270%**, and the USA at Nearly **500%**

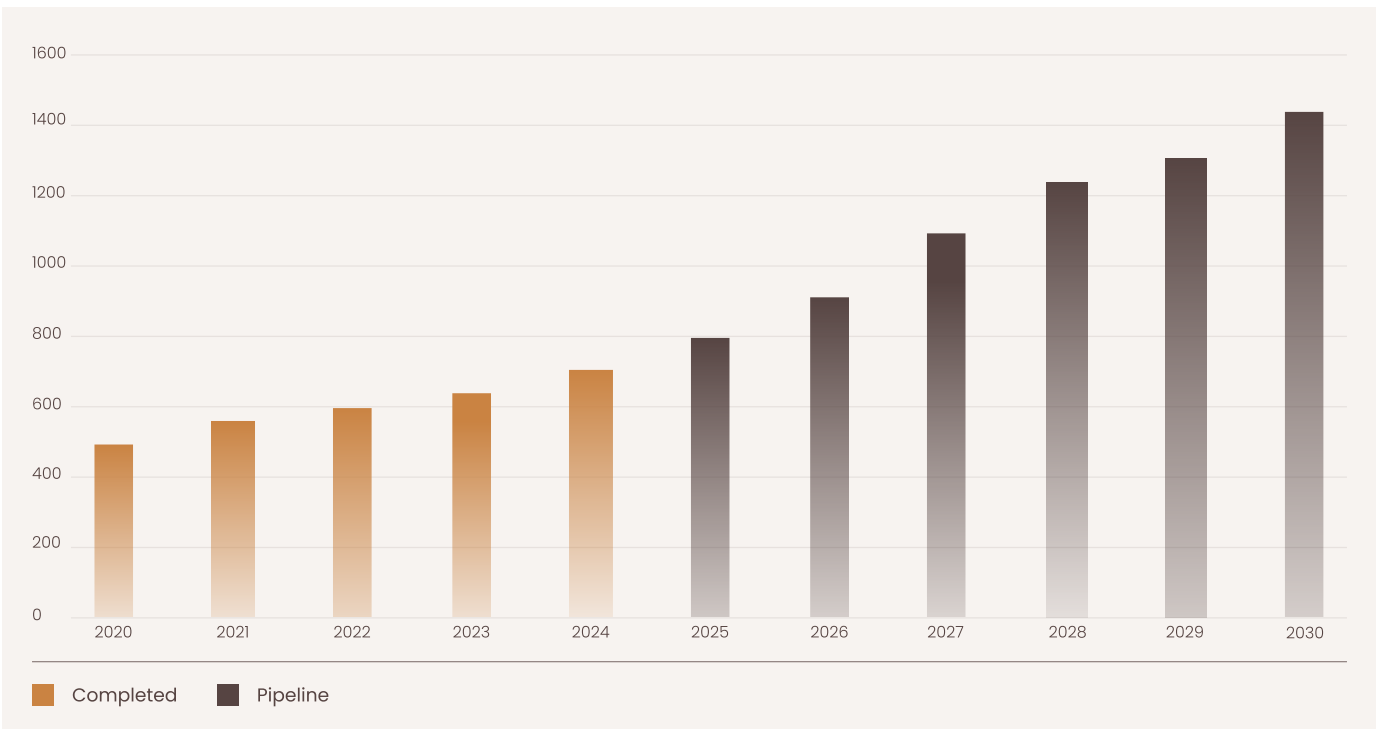


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WHERE DUBAI STANDS GLOBALLY

When compared to other major markets such as Miami, London, Spain, and Thailand, Dubai's luxury real estate market offers a far more compelling investment proposition. While Miami commands ultra premium prices, with Aston Martin Residences reaching AED 25,000 per square foot, a 525 % premium, Dubai's branded residences remain more competitively priced. For example, Bvlgari Residences, one of the most popular developments in Dubai, is priced at AED 10,500 per square foot and still delivers a 166% premium, while Bugatti Residences leads at a 237% premium. In London, The OWO Residences are priced at AED 20,000 per square foot, but high taxes and complex regulations dampen investor appeal. Similarly, while Spain's Lamborghini Tierra Viva and Thailand's Banyan Tree Residences offer exclusivity, they lack the investor friendly environment, liquidity, and long term growth potential that make Dubai the most attractive destination for luxury real estate investment today.



Source: Betterhomes Research

Figure 3. Projected Growth of Branded Residences worldwide. With 25% Market Share by 2030, the Number of Projects in the Region Will Reach Over 360 Developments