



Dubai Branded Residences 2025

A Structural Analysis of Supply, Pricing & Typology

Executive Summary

Dubai's branded residences market in 2025 exhibits distinct supply and price led segmentation that differs from standard residential stock. Shaped by strategic brand alignments, product format concentration, and consistent developer-brand integration across prime zones and comprising of 114 unique developments with a total inventory of 37,494 units. The landscape is characterized by four distinct brand typologies: Hospitality (80%), Fashion (17%) and Automotive (3%). These typologies reflect a strategy by developers to differentiate offerings via thematic branding and segmentation.

Pricing & Typology Insights

- Fashion-branded residences achieve the highest average pricing among the three categories, commanding AED3,814 per sq.ft. This reflects their premium positioning, driven by design-led interiors, bespoke finishes, and curated amenity experiences.
- Automotive-branded offerings follow closely with an average of AED3,564 per sq.ft., concentrated in the ultra-luxury segment and often featuring exclusive lifestyle elements inspired by high-end automotive brands.
- Hospitality-branded projects, while slightly lower in pricing at AED3,548 per sq.ft., continue to maintain strong appeal through prime locations and service-oriented living, offering a balanced blend of luxury and brand recognition.

Product Configuration

The development pipeline remains active, with 50% of the branded supply currently under construction. Developers most notably Emaar : (13,389 units), Damac : (5,904) and The First Group : (4,351) account for the majority of delivery volume. Product format is skewed toward apartments and serviced apartments (37,000+ units), with villas comprising just 273 units across the dataset. Branded residences are dominated by smaller units, with 1BR (32%), 2BR (30%), and Studios (22%) collectively making up 84% of total supply. Larger units like 3BR+ account for only 16%, highlighting a limited emphasis on spacious configurations.

Brand Typology & Developer Strategy

Brand Category	No. of Entries
Hospitality	91
Fashion	18
Automotive	5
Total	114

Hospitality:

Across 91 hospitality-branded residences in prime Dubai locations such as Downtown, Business Bay, Palm Jumeirah, Dubai Marina, and Dubai Hills, the unit mix is dominated by studios, 1-bedroom, and 2-bedroom layouts, with fewer larger units. This segment benefits from institutional-grade integration between developer and operator, as seen with brands such as Address and Vida , allowing for pricing consistency, brand recognition, and operational control across phases and locations.

Fashion:

The 18 fashion-branded developments, including Cavalli, de GRISOGONO, ORLA, Jacob & Co, Versace, Lagerfeld, Armani, Franck Muller, Bvlgari, Fashionz, and Aeternitas, are located in prime areas such as Business Bay, Downtown Dubai, Palm Jumeirah, Dubai Marina, and Dubai Harbour. The portfolio consists of 16 apartment developments and 2 villa communities. The unit mix includes 14.4% studios, 32.1% one-bedroom units, 37.4% two-bedroom units, 11.7% three-bedroom units, with the remaining share in larger unit types.

Automotive:

The five developments :Bugatti Residences, Mercedes-Benz Places, Mira Villas by Bentley Home, Lamborghini Mansions, and Tonino Lamborghini Residences positioning is consistent with a curated lifestyle product aimed at UHNW individuals, aligning real estate with automotive brand ethos with most of their inventory in three-bedroom plus or villa formats, reflecting their ultra luxury positioning and focus on low density layouts.

Project Extremes by Supply

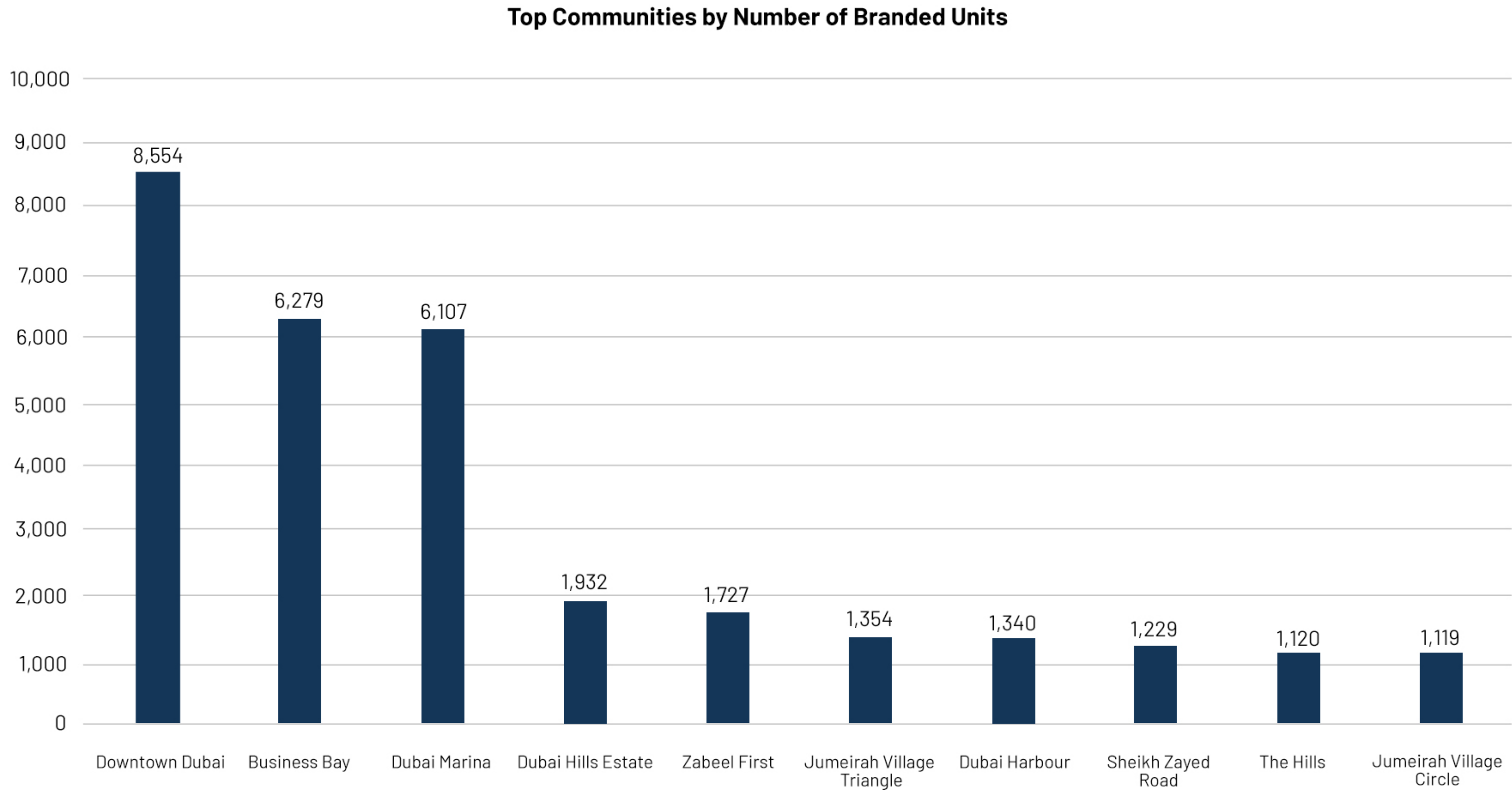
Top 5 Largest (by units)

Project	Developer	Units
Ciel Tower	The First Group	2,601
Safa Two De Grisogono	Damac Properties	1,208
SLS Dubai Hotel and Residences	WOW Investments	1,158
Prive by Damac	Damac Properties	989
The Address Residences Dubai Opera	Emaar Properties	866

Top 5 Smallest (by units)

Project	Developer	Units
Vida Residences Hillside Townhouses	Emaar Properties	8
Ava At Palm Jumeirah By Omniyat	Omniyat Properties	17
ORLA Infinity by Omniyat	Omniyat Properties	20
Four Seasons Private Residences	Four Season Hotels & Resorts	29
Mira Villas by Bentley Home	Mira Developments	36

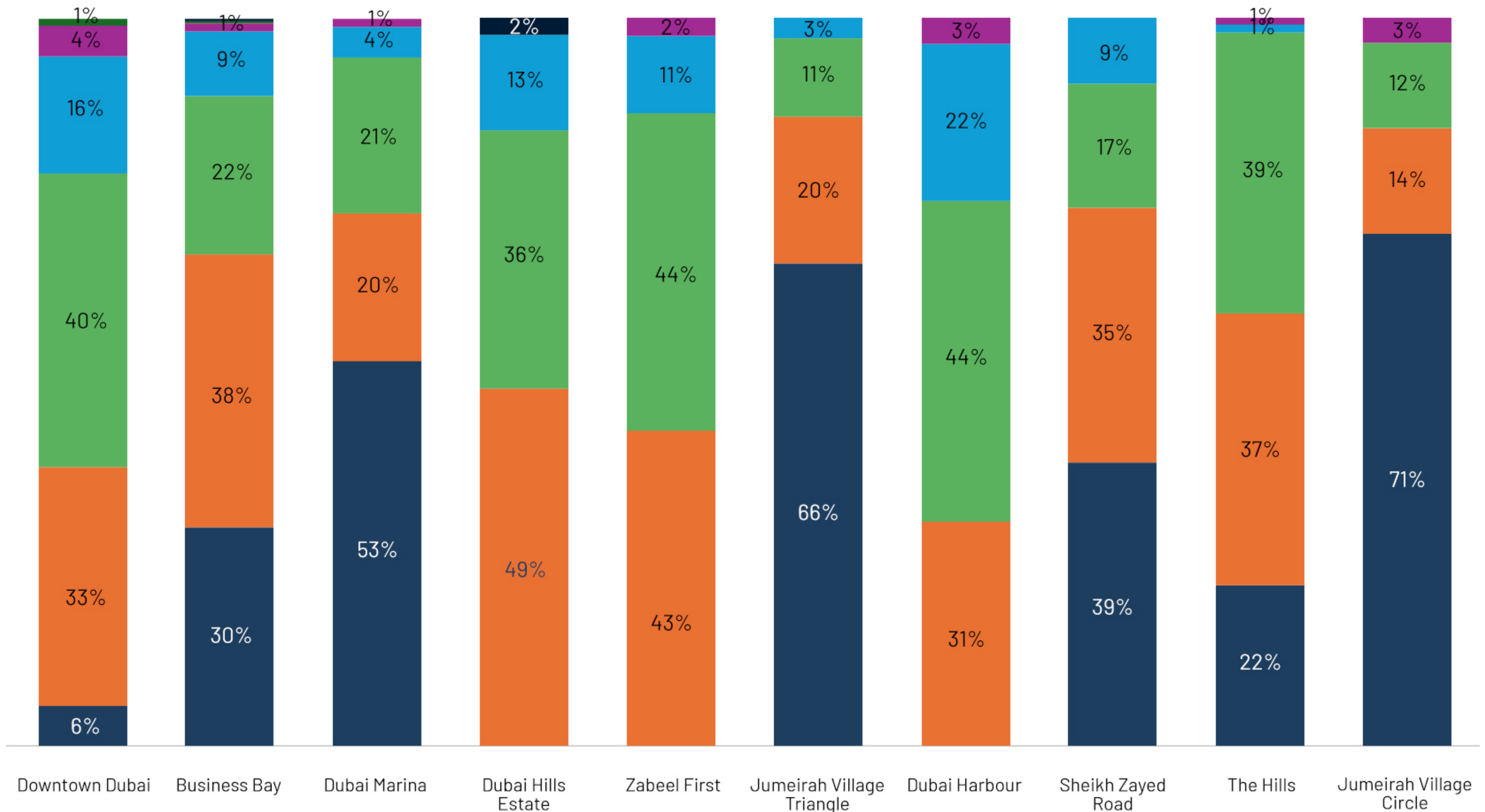
Branded Residences Top 10 Communities



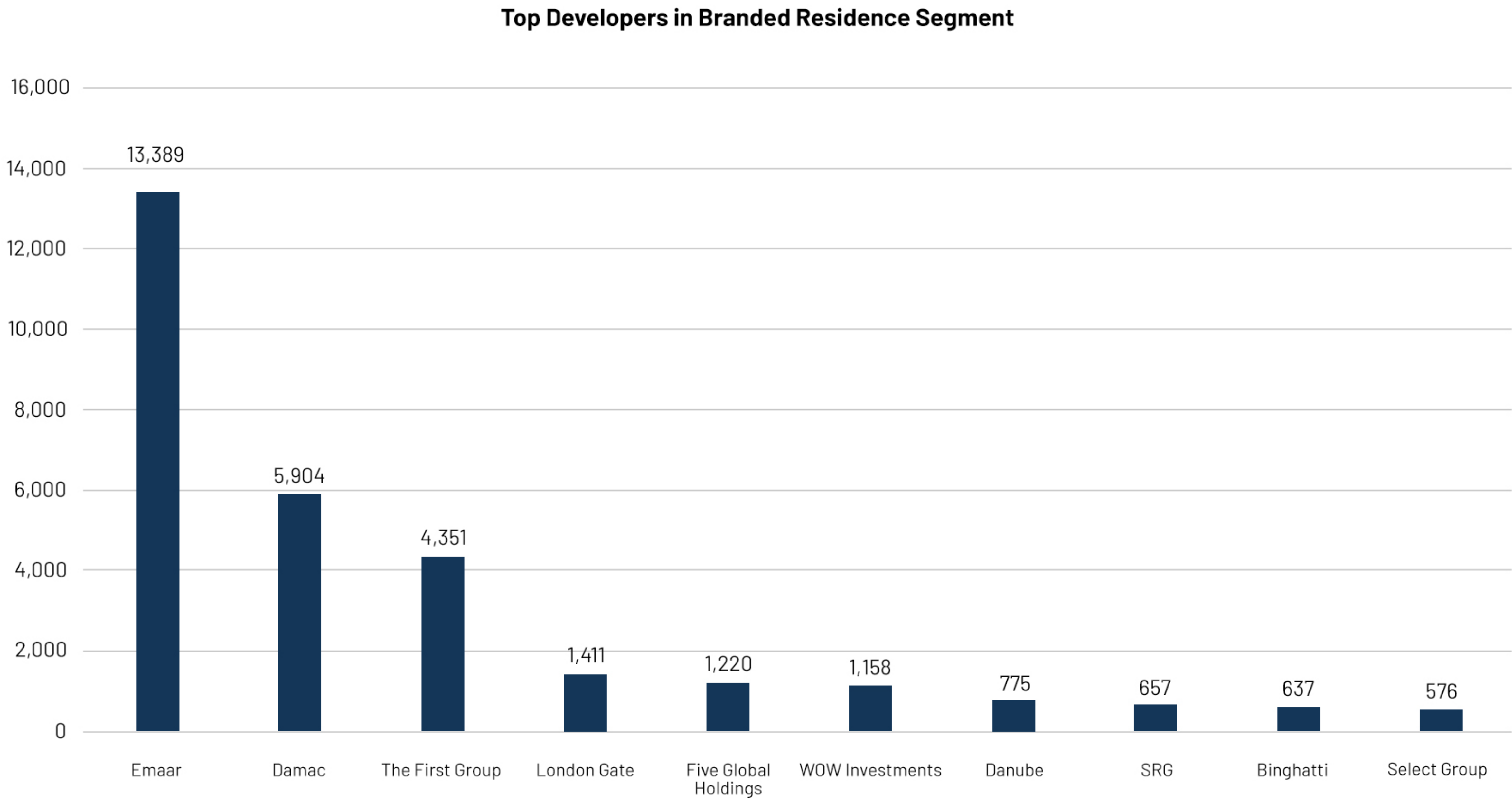
Unit Mix Analysis of Top 10 Communities

Community-wise Unit Mix

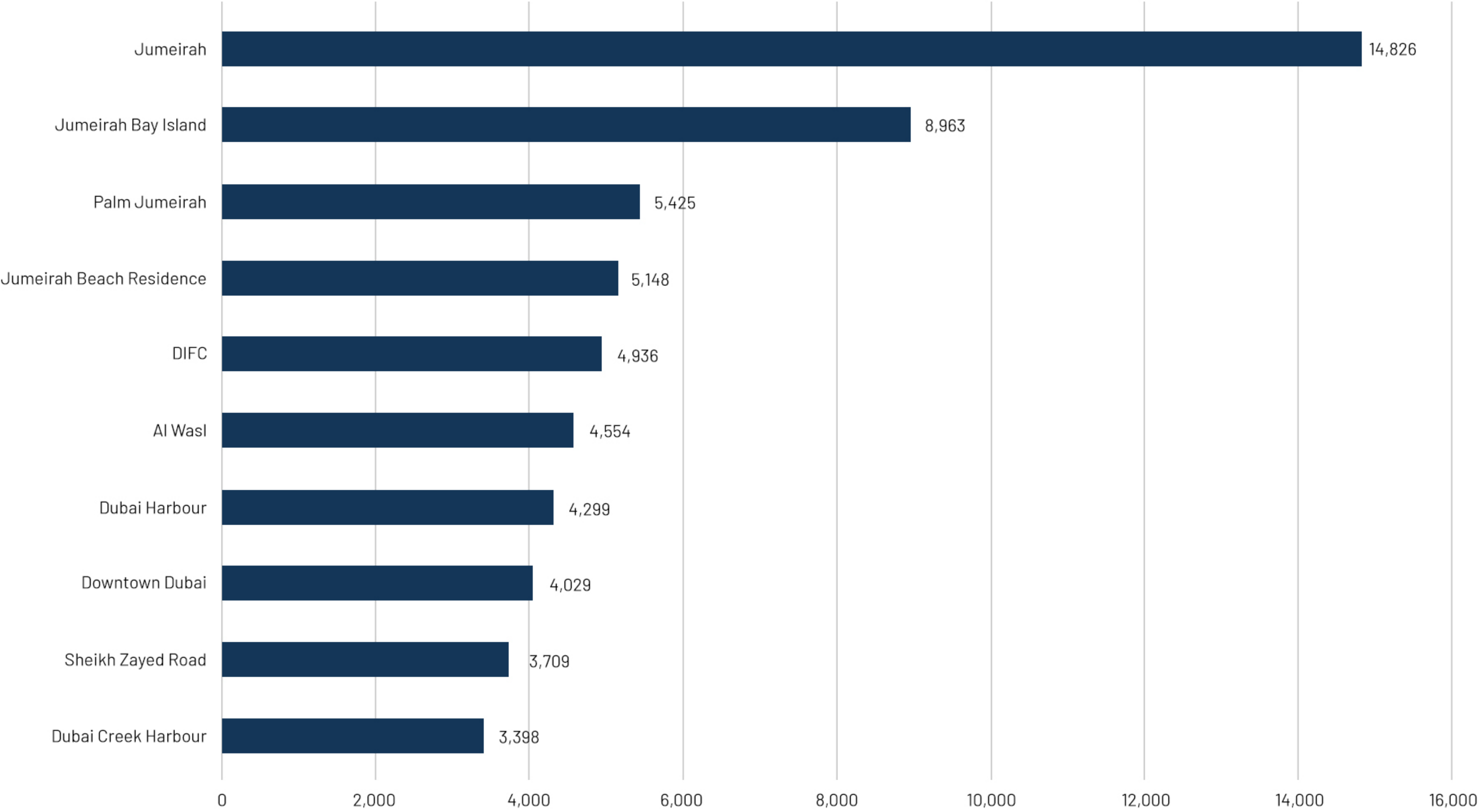
Studio 1 B/R 2 B/R 3 B/R 4 B/R 5 B/R 5+ B/R



Total Units by Developer

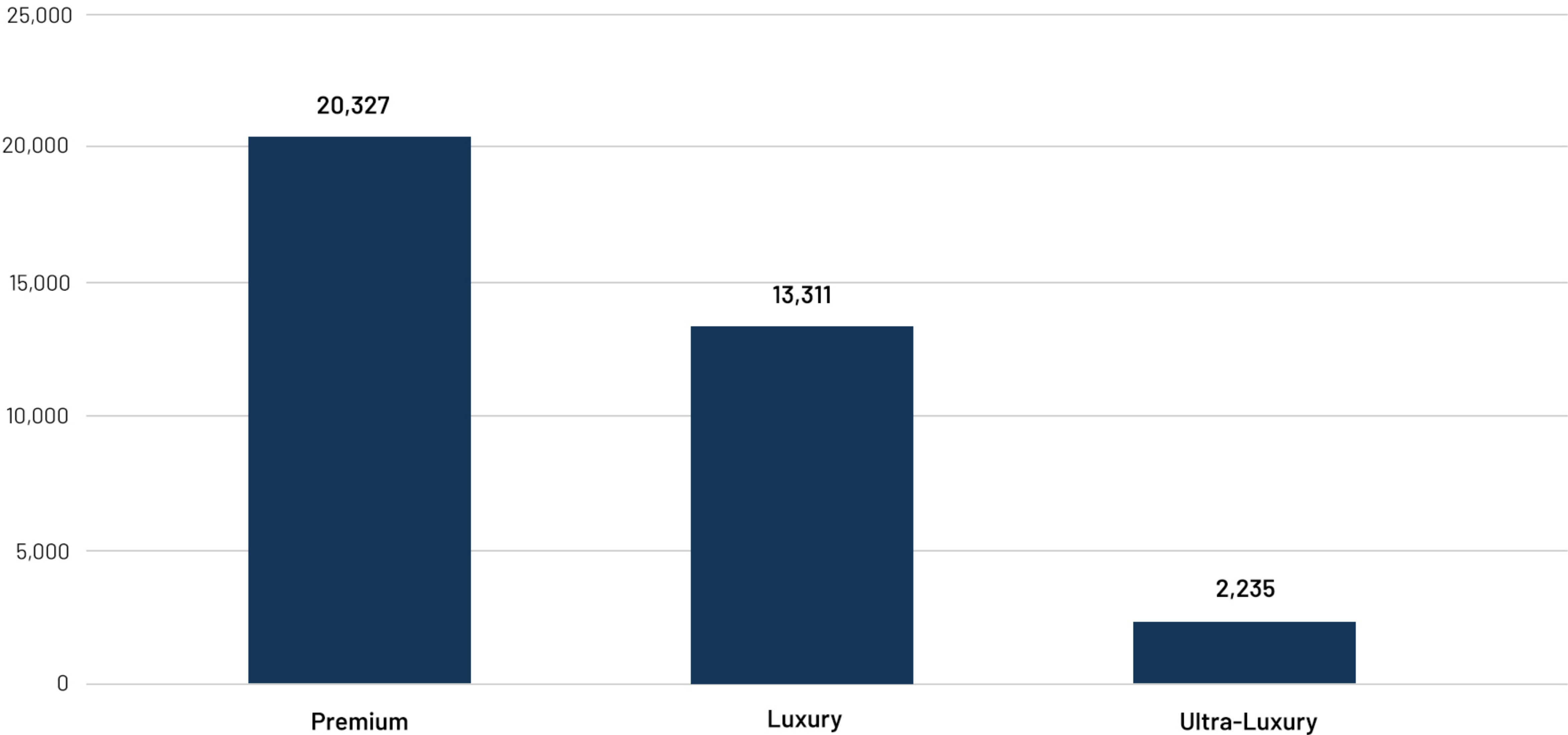


Top 10 Communities by Average Price (AED/SQ. FT.)



Total Units by Category

Total Units by Branded Residence Tier



* Category Definition (AED per sq ft): Premium (1,500–3,000), Luxury (3,000–4,500), Ultra-Luxury (>4,500)

Appendix

Category : Hospitality (91)

Brand Name	Projects
Address Residences	21
Vida Residences	15
Kempinski Marina Residences	4
Jumeirah Living	3
The Alba Residences	3
Damac Maison	3
Ritz Carlton	2
Four Seasons	2
St. Regis	2
Five Palm	3
Hilton Habtoor Grand	1
Others	32

Category : Fashion (16)

Brand Name	Projects
Cavalli (Couture & Casa)	4
de GRISOGONO	2
ORLA (Orla & ORLA Infinity)	2
Burj Binghatti by Jacob & Co	1
Palazzo Versace	1
Karl Lagerfeld	1
Armani Residences	1
Franck Muller	1
Fashionz by Danube	1
Bvlgari Mansions	1
Aeternitas Tower	1

Category : Automotive (5)

Brand Name	Projects
Bugatti Residences	1
Mercedes Benz Places	1
Mira Villas by Bentley Home	1
Lamborghini Mansions	1
Tonino Lamborghini Residences	1

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