

YUVA GROUP

Dubai Branded Residences

The Rise of Branded Residences in
Dubai's Luxury Real Estate Market

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Rise of Branded Residences

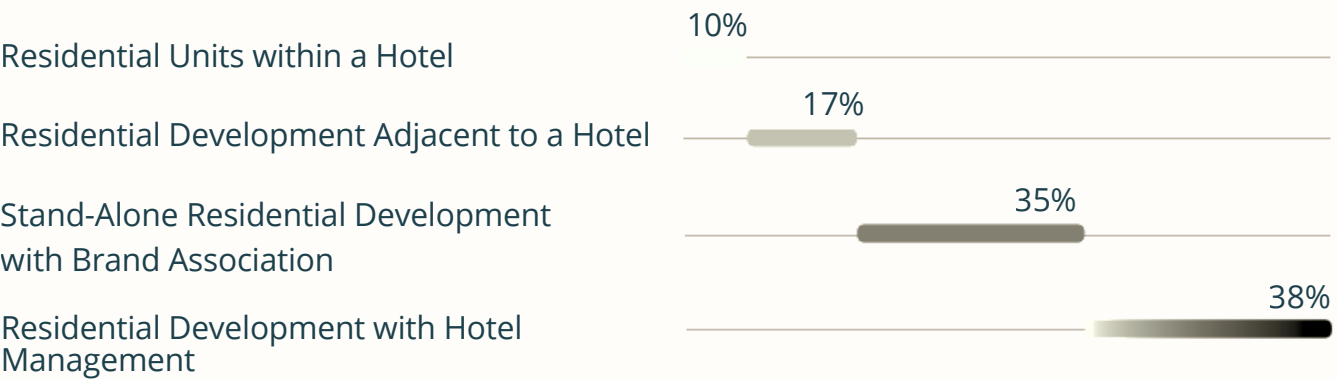
Factors Driving Growth

Government incentives such as **no taxes**, **extended residency permits**, and a continually **rising international buyer base** have distinctly propelled Dubai past traditional luxury hubs. The city's strategic advantages coupled with a booming hospitality sector have solidified its reputation as the preeminent location worldwide for branded residential living.

The Triple Win Model

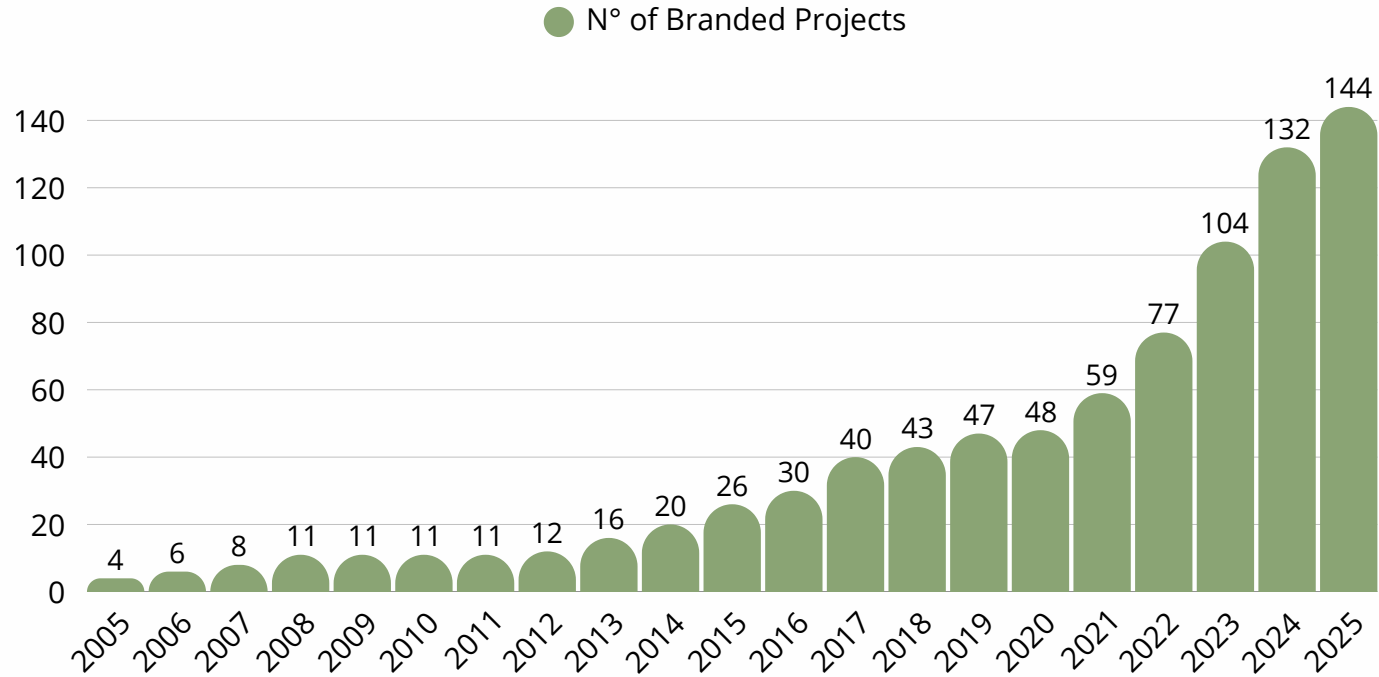
- **Developers:** Benefit from premium pricing, quicker turnarounds, access to high-net-worth clients, and global brand credibility.
- **Brands:** Access new revenue channels, expand brand recognition, and reinforce luxury positioning.
- **Clients:** Enjoy superior design, consistent service quality, strong asset appreciation, and a lifestyle of exclusive ease.

Market Evolution



MARKET DATA SHOWS A 3% DECLINE IN TRANSACTION VOLUME YEAR-ON-YEAR, BUT AN INCREASE OF 37% IN TRANSACTION VALUE, HIGHLIGHTING A TREND TOWARD LARGER AND MORE VALUABLE PROPERTY TRANSACTIONS.

DUBAI’S BRANDED RESIDENCES SECTOR **GREW BY 13%** DURING THE FIRST HALF OF 2025, WITH **12 NEW DEVELOPMENTS** CONTRIBUTING AN EXTRA 5,510 UNITS. THE INVENTORY INCLUDES RESIDENTIAL PROJECTS ADJACENT TO HOTELS (17%), THOSE MANAGED BY HOTEL OPERATORS (38%), STANDALONE BRANDED RESIDENCES (35%), AND RESIDENTIAL UNITS INCORPORATED WITHIN HOTELS (10%).





PRICING & PREMIUMS

Branded properties here command an average premium of **\$1,029 per sq.ft.**, surpassing **non-branded counterparts at \$737**. Top locations such as Dubai Marina, Downtown Dubai, and Palm Jumeirah illustrate the highest price disparities and demand.

Ready-to-occupy units average \$1,015 per sq.ft., while under construction developments average \$1,049 per sq.ft. Most units remain under construction, supporting future sales growth..

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\$ 1,029

Average Price per Sq.ft
of Branded Residences

144

Total Number of
Branded Residences

48,474

Total Number of
Branded Units

37%

Increase in Sales
Volume YoY

\$ 4,981

Highest Price per Sq.ft
Recorded

\$ 44.61M

Most Expensive Unit Sold
Jumeirah Asora Bay
Unit Type: 6-Bedroom Penthouse

Dubai remains at the **forefront of the global branded residences** market, hitting a new benchmark with 48,474 branded units as of the first half of 2025. The city introduced **12 new branded projects in the first six months**, adding 5,510 units to its expanding portfolio. Despite a 3% decline in the number of transactions compared to H1 2024, the total transaction value increased by 37%, indicating a distinct shift towards ultra-premium properties and higher-value deals.

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Ready vs. Under Construction

Market Overview and Key Differences

PRICING	INVENTORY & SUPPLY	
\$1,049	30,374	90
AveragePrice perSq.ft of Under- Construction Property	Total Number of Under- Construction Units	Under Construction Projects
\$1,015	18,100	54
AveragePriceper Sq.ft of Ready Property	Total Number of Ready Units	Ready Projects

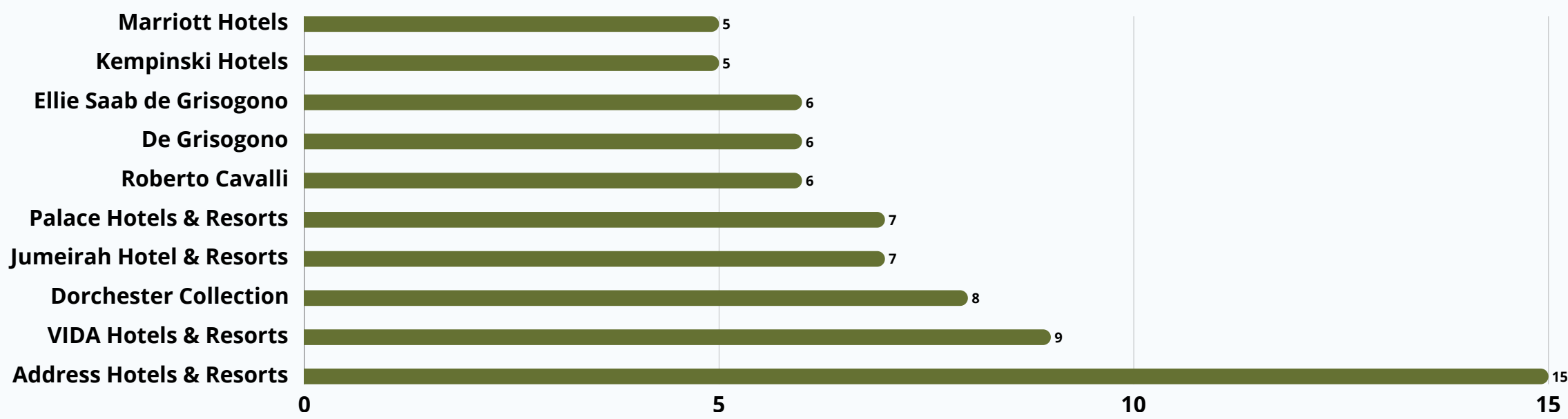
Top Performing Branded Residences Best-Selling Projects of H1 2025

Under-Construction Projects	Community	Volume	Total Sales Price
Rove Home Dubai Marina	Dubai Marina	565	\$ 275M (1.01B AED)
Franck Muller Vanguard	Dubai Marina	494	\$ 240M (882M AED)
Palace Villas Ostra	The Oasis	369	\$ 1.83B (6.72B AED)
Ready Projects	CCommunity	Volume	Total Sales Price
DAMAC Towers By Paramount	Business Bay	76	\$ 41M (152M AED)
Grand Bleu Towers	Dubai Harbour	65	\$ 106M (389M AED)
Address Harbour Point	Dubai Creek Harbour	64	\$ 70M (257M AED)

Leading Brands

The Most Influential Names in Dubai’s Branded Residences Market

Top Brands by Number of Developments



Top Brands Price Wise

Project	Average price per sq.ft in \$	Average Price per Sq.ft in AED
Aman Resorts, Hotels & Residences	3,593	13,195
BVLGARI	3,194	11,729
Atlantis Resorts	2,673	9,816
Four Seasons Hotels and Resorts	2,303	8,458
Ra les Hotels & Resorts	2,115	7,767
Baccarat	1,812	6,654
Dorchester Collection	1,747	6,4117
One & Only Resorts	1,599	5,873
Armani	1,562	5,738
Mercedes-Benz	1,472	5,406



HOTSPOTS

Where is the Money Going?

Top Investment Districts & Hotspots:

Key locations for branded residences in Dubai include:

- **Downtown Dubai** (with 21 projects),
- **Dubai Marina** (17 projects),
- **Palm Jumeirah** (16 projects).

These areas attract the highest sales volumes and premium pricing, amid strong demand from international buyers.

TOP
PERFORMING
COMMUNITIES

Dubai Marina
Total Sales: 1,320
Total Value: \$899.3M

Downtown Dubai
Total Sales: 773
Total Value: \$1.55B

The Oasis
Total Sales: 730
Total Value: \$3.53B

Dubai Harbour
Total Sales: 610
Total Value: \$1.18B

Business Bay
Total Sales: 464
Total Value: \$558M

Most Expensive Properties Sold

Date	Project	Beds	Unit Size (Sq.ft)	Sales Price
28 May 2025	Jumeirah Asora House	6	18,182	\$44.6M
21 April 2025	Bulgari Lighthouse	5	11,654	\$42.4M
30 June 2025	Bulgari Lighthouse	5	11,656	\$39.9M
27 May 2025	Jumeirah Asora Bay	5	19,035	\$39.1M
07 April 2025	The Four Seasons Private Residences	4	9,442	\$38.1M

Upcoming Most Important Projects

Dubai's next Landmark Developments

Trump Tower

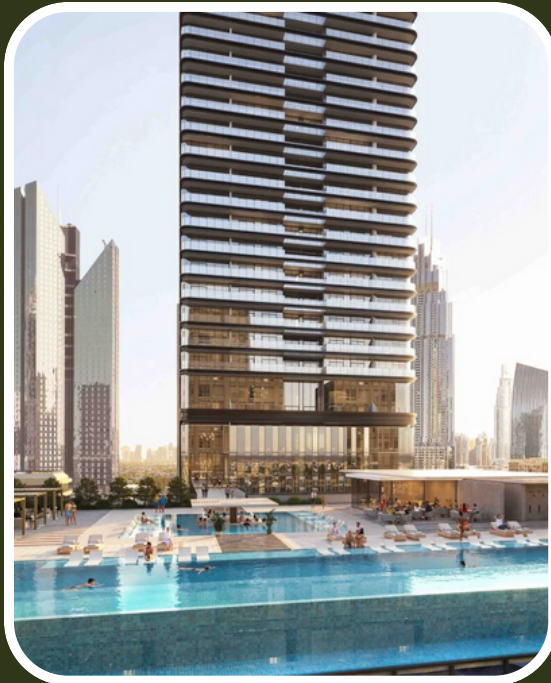
Developer: DarGlobal

Location: Downtown Dubai

Completion: Q4 2031

Avrg. Price per Sq.ft: \$934

Trump International Hotel & Tower Dubai by DarGlobal stands as a pinnacle of ultra-luxury, featuring 1 to 4-bedroom residences and penthouses spread across 80 floors. Tailored for those seeking the highest standards, it offers private lifts, high-quality materials, and spacious interiors with lofty ceilings. Occupants benefit from sweeping views of the Burj Khalifa, Dubai's skyline, and the sea. Facilities include a rooftop swimming pool, state-of-the-art fitness center, and the exclusive indoor Trump Club. Every element embodies prestige, comfort, and elegance. This iconic tower redefines upscale urban living in Dubai, skillfully merging residential comfort with hospitality to offer an unparalleled lifestyle.



Jumeirah Asora Bay

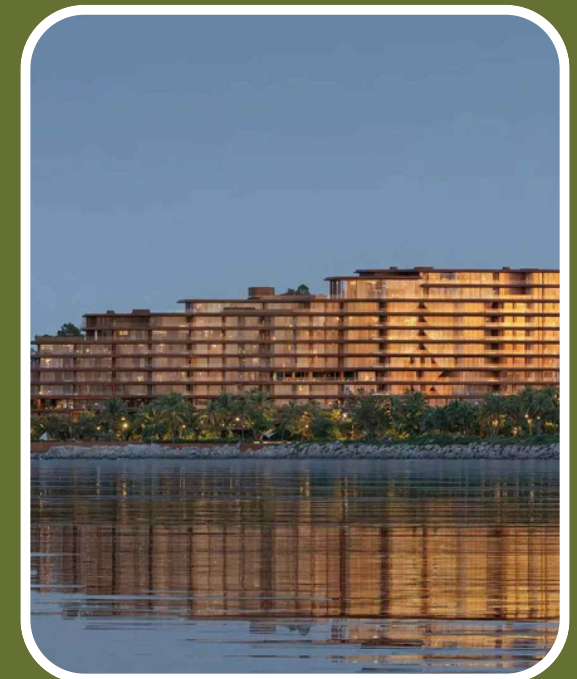
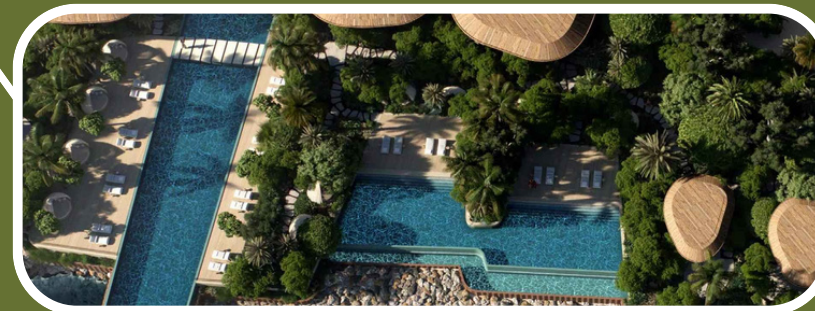
Developer: Meraas

Location: La Mer.

Completion: Q1 2029

Avrg. Price per Sq.ft: \$2,274

Jumeirah Asora Bay at La Mer by Meraas is a lavish beachfront residential community comprising 4 to 7-bedroom apartments and penthouses. Situated just 5 km from Downtown Dubai, it provides effortless access to premier attractions like Burj Khalifa, Dubai Mall, and City Walk. The development integrates coastal tranquility with the dynamic spirit of Dubai, nestled amid natural hills and displaying smooth façades inspired by sand dunes and ocean waves. Its design emphasizes unity with nature through materials such as stone, glass, and wood. This seaside jewel sets new standards for luxury living with waterfront promenades, private pathways, and magnificent sea vistas.



How We Made It

This document delivers an in-depth examination of Dubai's branded residences sector covering the period from January 1 to June 30, 2025 (H1 2025). The conclusions are drawn from actual transactional records and confirmed data sources to guarantee reliability and precision throughout all reported insights and figures.

Data Sources

The numerical data incorporated in this report has been collected from:

- Dubai Land Department (DLD) transaction logs
- Internal sales figures from Yuva Group
- Third-party analytics platforms from property monitor
- Verified disclosures from industry experts and development partners

Where applicable, datasets underwent cross-checking to remove duplicates, rectify inconsistencies, and authenticate pricing and volume data.

Definitions

- Branded Residences denote housing units created in partnership with a recognized international brand, offering a specific lifestyle image, brand identity, and typically hotel-like services.
- Non-Branded Residences include all other residential offerings within similar segments and regions lacking brand affiliation.
- Ready Properties comprise units completed and handed over before or during H1 2025.
- Off-Plan Properties represent those sold ahead of handover, including newly launched, under construction, and pipeline projects.

Timeframe & Scope

- The scope covers only the first half of 2025 (January 1 – June 30).
- Year-on-year and half-year comparisons refer to data from H1 2024 and H1 2025, respectively.

Price Premium Calculation

- Average price per square foot was computed for both branded and non-branded properties within identical or comparable communities to ensure like-for-like assessment.
- Premiums are expressed as the percentage increase branded residences hold over non-branded properties in similar areas.

Currency & Conversion

- All currency conversions from AED to USD are consistently applied at a fixed rate of 1 AED = 0.27 USD.
- Prices and volumes are presented in dual currencies for ease of understanding and global reference.

Limitations

- Despite rigorous efforts for data accuracy, minimal discrepancies may arise from registration delays, confidential off-market deals, or reporting variances by third-party sources.
- Data on off-plan launches includes only publicly disclosed or verified developments and might not cover every forthcoming project in Dubai.

This methodology underpins transparency and bolsters confidence in the insights conveyed throughout this report. For inquiries, additional data, or tailored analyses, please reach out to Yuva Group.

About Us

At Yuva Group, we serve as your strategic partner in establishing a robust online presence. With expertise spanning property, construction, and finance, we blend creative thinking with data-informed strategies to amplify your brand. From engaging content and seamless website development to social media management and impactful branding, we offer customized solutions that deliver tangible results. Let us assist you in standing out, expanding, and leading in your market segment.

Branded Residences Services

Your brand deserves prominence—we design logos, color schemes, and visuals that narrate your unique story and leave a lasting impact. Beyond branding elements, we create comprehensive brand guidelines, cohesive packaging, and branded assets such as business cards, presentations, and brochures. Our team conducts market and competitor analysis to position your brand strategically, ensuring it becomes instantly recognizable and memorable.

- **BRANDING**
- **WEB-DESIGN**
- **SOCIAL MEDIA MARKETING**
- **CONTENT CREATION**
- **E-COMMERCE**
- **AI INTEGRATIONS**

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E-MAIL

info@theyuvagroup.com

TELEPHONE NUMBER

+393388790680

LOCATIONS

Istanbul | Marbella | Dubai

THANK YOU!