



MORGAN'S
INTERNATIONAL REALTY



Dubai's Branded Residences Report – H1 2025



Analyzing Dubai's Fastest-Growing Real Estate Asset Class & its
Future Trajectory.

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CEO's Message



Elias Hannoush
(Managing Director)

"Dubai's real estate market is undergoing a fundamental shift. Branded residences are no longer a niche segment they have become a core asset class, attracting institutional investors and setting new price benchmarks. This report offers a strategic framework for investors, developers, and global brands to navigate this evolving landscape and capitalize on its long-term potential."

Key Takeaways

H1 2025 at a Glance

Dubai continues to lead the global branded residences sector, reaching a new milestone with 48,474 branded units as of H1 2025. The city welcomed 12 new branded projects in the first half of the year, adding 5,510 units to its growing inventory. Despite a 3% drop in transactions volume compared to H1 2024, the total transactions value rose by 37%, signaling a clear shift toward ultra-prime real estate and larger ticket sizes.

\$1,029

(**₹ 3,779**)

Average Price per Sq.ft of
Branded Residences

144

Total Number of
Branded Residences

48,474

Total Number of
Branded Units

\$ 44.61M

(**₹ 164M**)

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

\$ 4,981

(**₹ 18,294**)

Highest Price per Sq.ft
Recorded

37%

Increase in Sales
Volume YoY

The Rise of Branded Residences

How Dubai Became the Global Hub for Branded Residences

Pro-investor policies, world-class infrastructure and a thriving luxury real estate market have fueled Dubai's growth into the global hub for branded residences. A tax-free economy long-term residency incentives and rising demand from international investors have driven rapid expansion, surpassing traditional luxury hubs and solidifying Dubai's position as the premier destination for branded residences.



A Triple Win Formula!

Branded residences create a winning model for all stakeholders to benefit.

Developer

- Higher prices & faster sell-outs
- Access to elite buyers
- Enhanced credibility & global appeal

Brand

- New revenue & market expansion
- Stronger loyalty & prestige
- Extended presence in ultra-luxury real estate

Client

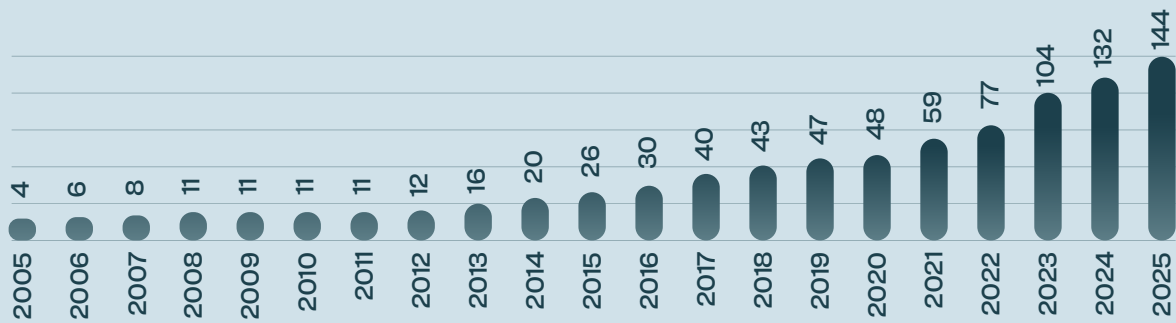
- Superior design, service & management
- Stronger capital appreciation & rental returns
- Exclusive lifestyle & hassle-free ownership



The Bristol Luxury Hotels & Resorts

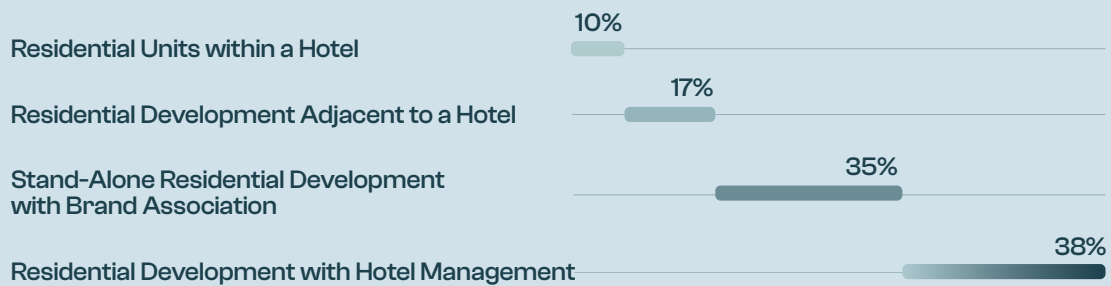
Market Evolution

Dubai's branded residences market grew by 13% in H1 2025, with 12 new projects adding a total of 5,510 units to the inventory.



Note: The growth of branded residences is shown year by year, highlighting their expansion since 2005.

Distribution by Property Type



Palace Villas Ostra, The Oasis

Market Performance

Data-Driven Insights



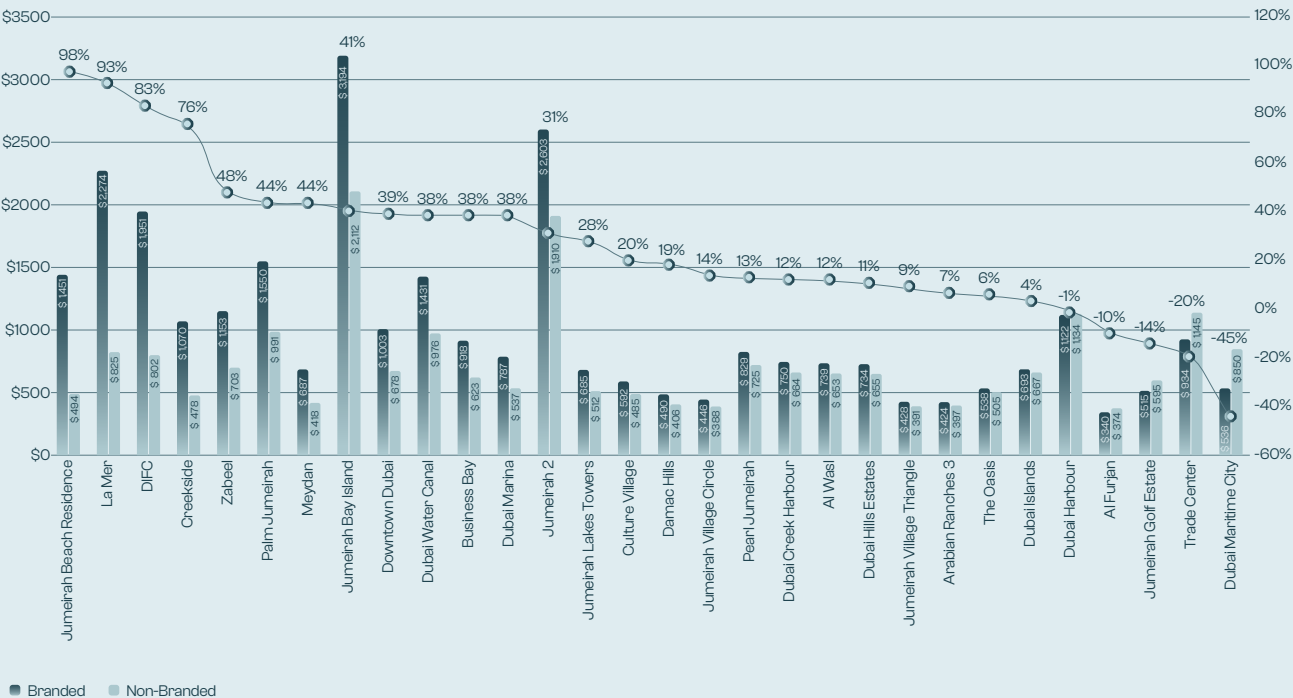
This chart compares the total number and value of branded residence transactions in H1 2025 versus H1 2024.

Price Premium Analysis

Branded vs Non-Branded Residences (Average Price per Sq.ft)



Neighborhood Premium Analysis: Branded vs. Non-Branded



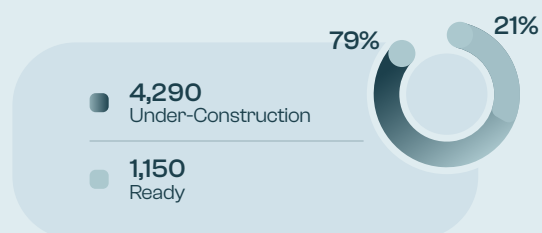
This analysis compares the average price per square foot of branded and non-branded residences across each Dubai community, highlighting the price premium associated with branded living.

Ready vs. Under-Construction

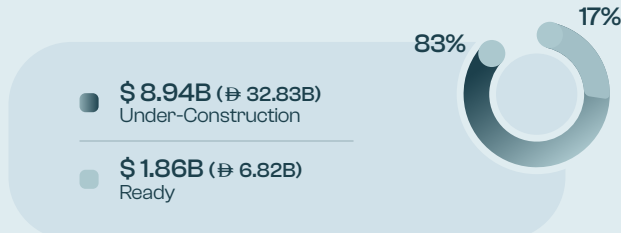
Market Overview and Key Differences

Performance Comparison

Sales Volume

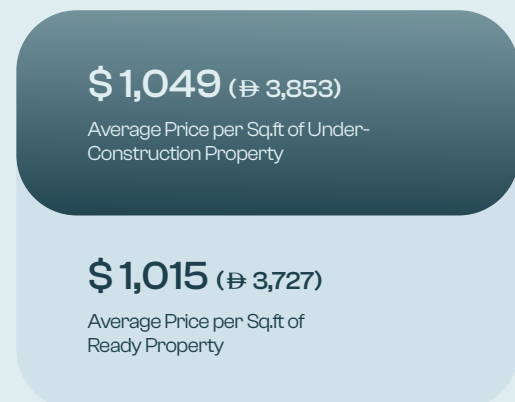


Sales Value

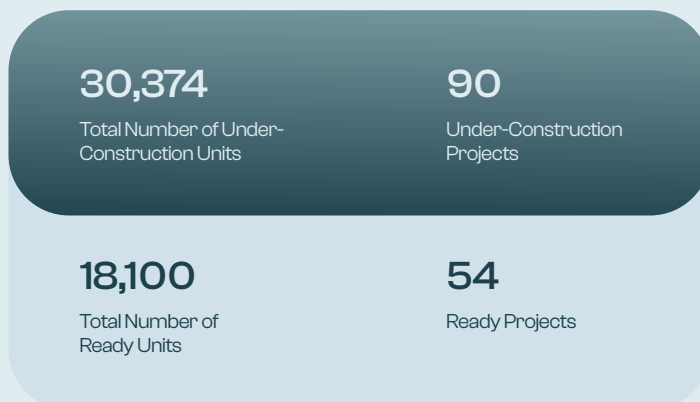


This comparison highlights the distribution of sales volume and value between ready and under-construction branded residences in H1 2025.

Pricing



Inventory & Supply



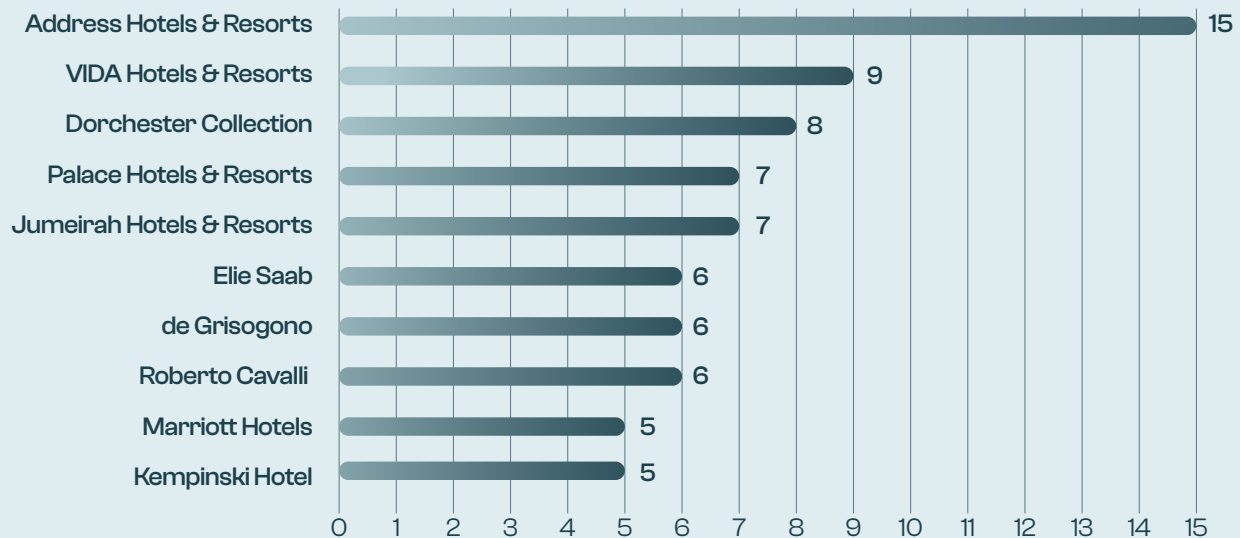
Top Performing Branded Residences Best-Selling Projects of H1 2025

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

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 (\$)	Average Price per Sq.ft (₹)
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
Raffles Hotels & Resorts	2,115	7,767
Baccarat	1,812	6,654
Dorchester Collection	1,747	6,417
One & Only Resorts	1,599	5,873
Armani	1,562	5,738
Mercedes-Benz	1,472	5,406

Address Hotels & Resorts holds the largest share of Dubai's branded residences market with 15 developments in total. Close contenders include VIDA Hotels & Resorts and Dorchester Collection, highlighting the dominance of luxury hospitality brands.

Hotspots

Where the Money is Going?

This map highlights key hotspots with the highest concentration of branded residences, along with emerging communities shaping Dubai's luxury real estate landscape.

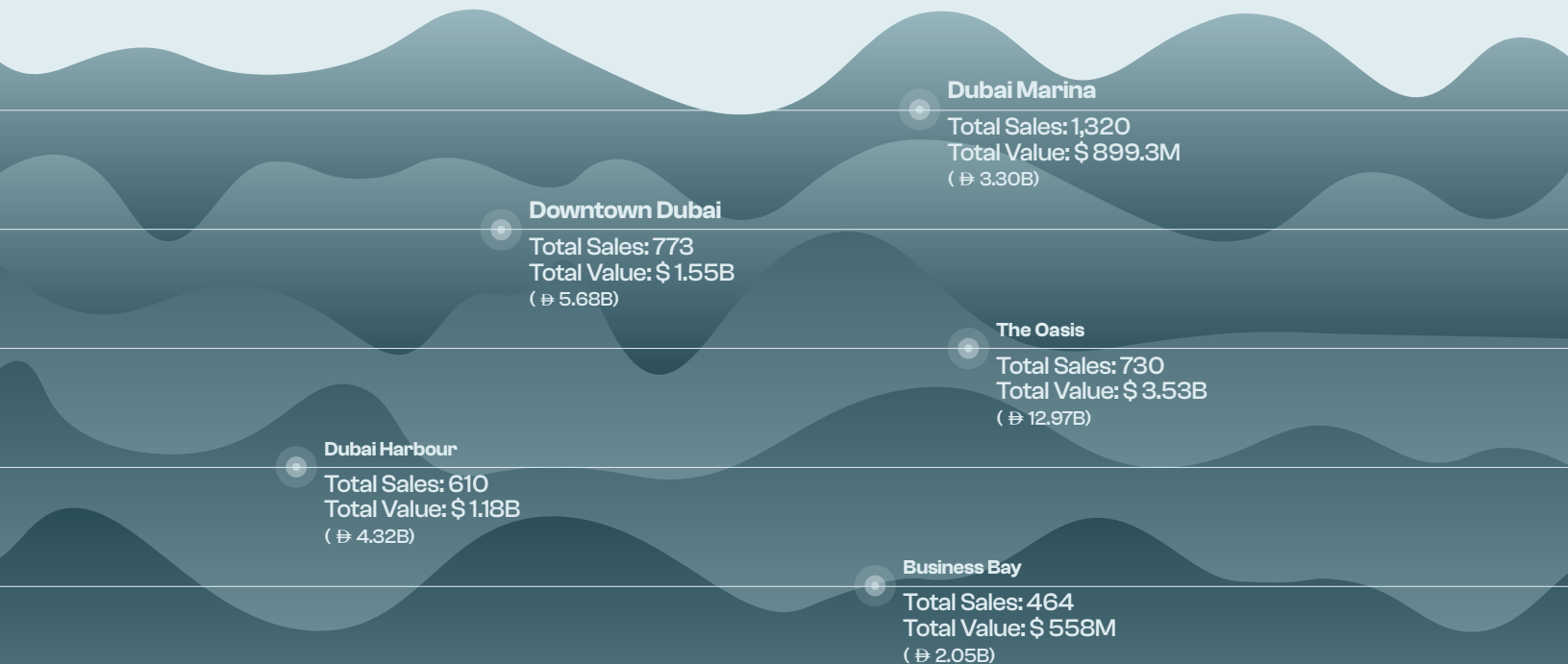


Most Expensive Properties Sold

Date	Project	Beds.	Unit Size (Sq.ft)	Sales Price
28 May 2025	Jumeirah Asora Bay	6	18,182	\$ 44.6M (₹ 163.8M)
21 April 2025	Bulgari Lighthouse	5	11,654	\$ 42.4M (₹ 155.8M)
30 June 2025	Bulgari Lighthouse	5	11,656	\$ 39.9M (₹ 146.6M)
27 May 2025	Jumeirah Asora Bay	5	19,035	\$ 39.1M (₹ 143.6M)
07 April 2025	The Four Seasons Private Residences	4	9,442	\$ 38.1M (₹ 140M)

Top Performing Communities

Highest Sales Volume Locations in H1 2025



Spotlight on the Upcoming Projects

Dubai's Next Landmark Developments

Trump Tower

Developer: DarGlobal

Location: Downtown Dubai

Completion: Q4 2031

Avrg. Price per Sq.ft: \$ 934 (₹ 3,429)

Trump International Hotel & Tower Dubai by DarGlobal is a landmark of ultra-luxury living, offering 1-4-bedroom residences and penthouses across 80 floors. Designed for those who demand excellence, it features private elevators, premium materials, and expansive interiors with high ceilings. Residents enjoy panoramic views of the Burj Khalifa, Dubai skyline, and the sea. Amenities include a rooftop pool, cutting-edge fitness center, and the exclusive indoor Trump Club. Every detail reflects a commitment to prestige, comfort, and sophistication. This iconic tower sets a new benchmark for elite urban living in Dubai. Seamlessly combining hospitality and residential living, it offers a refined lifestyle where luxury is not an exception, but the standard.

[Read More](#)

Jumeirah Asora Bay

Developer: Meraas

Location: La Mer.

Completion: Q1 2029

Avrg. Price per Sq.ft: \$ 2,274 (₹ 8,351)

Jumeirah Asora Bay at La Mer by Meraas is an ultra-luxury beachfront residential development featuring 4-7-bedroom apartments and penthouses. Located just 5 km from Downtown Dubai, it offers seamless access to top attractions like Burj Khalifa, Dubai Mall, and City Walk. The project blends coastal serenity with Dubai's vibrant lifestyle, set amidst natural hills and designed with flowing facades inspired by dunes and ocean waves. Its architecture emphasizes harmony with nature using materials like stone, glass, and wood. This coastal gem redefines high-end living with waterfront promenades, private walkways, and panoramic sea views. Residents enjoy a rare balance of urban convenience and tranquil beachfront luxury, curated by visionary design.

[Read More](#)



Discover an exclusive collection of branded homes featured on our website - luxury residences from Dubai's most iconic brands and developers.

[Explore](#)

Methodology

This report presents a detailed analysis of Dubai's branded residences market for the period between Jan 1 and June 30, 2025 (H1 2025). The findings are based on actual transaction data and verified sources to ensure accuracy and credibility across all insights and metrics presented.

Data Sources

All quantitative data used in this report has been sourced from:

- Dubai Land Department (DLD) transaction records
- Internal sales data from Morgan's International Realty
- 3rd party data analytics software from propertymonitor
- Verified industry sources and partner developer disclosures

Where necessary, datasets were cross-referenced to eliminate duplicates, normalize inconsistencies, and validate pricing and volume metrics.

Definitions

- Branded Residences refer to residential units that are developed in collaboration with a recognized global brand, offering distinct lifestyle positioning, brand identity, and often hotel-style services.
- Non-Branded Residences refer to all other residential units in comparable segments and locations, without brand affiliation.
- Ready Properties are units that were completed and handed over prior to or during H1 2025.
- Off-Plan Properties are those that were sold prior to handover, including newly launched, under-construction, and pipeline projects.

Timeframe & Scope

- The report covers H1 2025 only (Jan 1 – June 30, 2025).
- Year-on-year (YoY) and half-year comparisons reference data from H1 2024 and H1 2025 respectively.

Price Premium Calculation

- The average price per square foot was calculated for both branded and non-branded properties within the same or comparable communities to ensure like-for-like comparison.
- Premiums are expressed as a percentage increase of branded residences over non-branded properties in the same area.

Currency & Conversion

- All AED to USD conversions in this report are based on a fixed exchange rate of 1 AED = 0.27 USD.
- Prices and volumes are displayed in both currencies for accessibility and international reference.

Limitations

- While every effort has been made to ensure the accuracy of the data, slight variances may occur due to timing delays in registration, confidential off-market transactions, or third-party data reporting discrepancies.
- Data for off-plan launches is limited to publicly disclosed or verified developments and may not capture every pipeline project in Dubai.

This methodology is designed to provide transparency and reinforce the credibility of the insights presented throughout the report. For questions, further data requests, or custom breakdowns, please contact Morgan's International Realty.



About Us

Morgan's International Realty is a premier luxury real estate brokerage and property investment consultancy firm. Established in Dubai during a pivotal moment in the industry, our mission was to revolutionize a market that was just beginning to evolve. Empowered by a collaborative effort between the public and private sectors, we aimed to transform the perception of the real estate market and its players. Recognizing a critical need for higher quality service and transparency, we have dedicated ourselves to setting benchmarks in professionalism and investor protection. Our commitment to client satisfaction and retention is the cornerstone of our sustainable and organic growth. We believe that the success of our clients is a direct reflection of our own.

Branded Residences Services

Our expert team provides tailored consulting services, offering data-driven insights and strategic guidance for developers, investors, and luxury brands. Our studies are detailed well-recognized, and widely covered. We conduct bespoke research for clients seeking to up their property development game. Services you may be interested in:

- Brand Introduction
- Feasibility Study
- Pricing Strategy
- Sales and Marketing Strategy
- Execution and Documentation
- Management and Operation

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