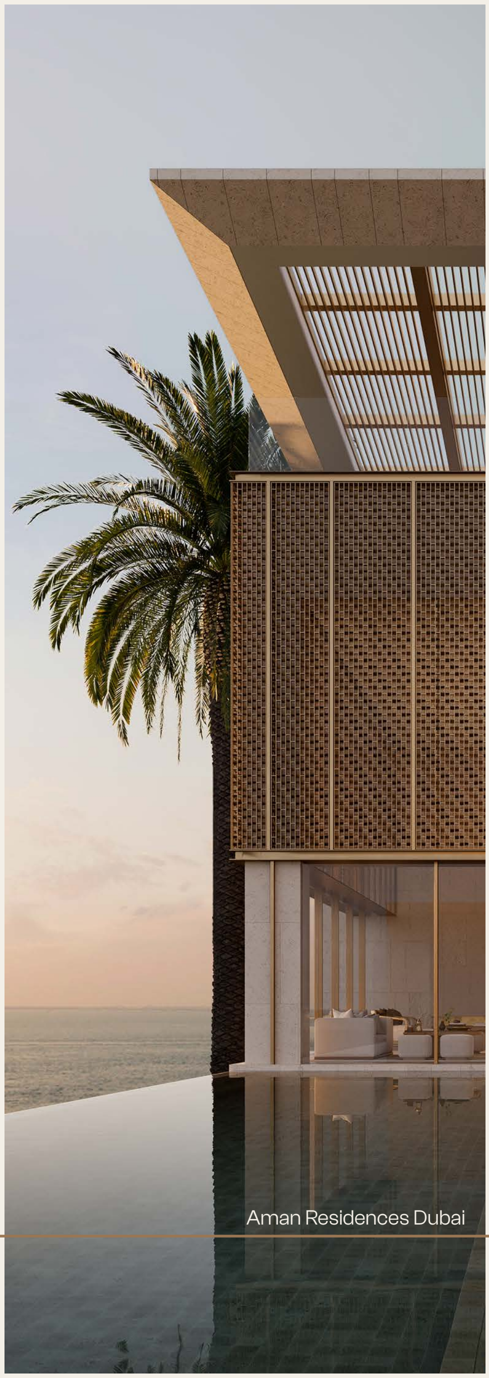
MORGAN'S
INTERNATIONAL REALTY

Dubai's Branded Residences Report

Analysing Dubai's Branded Residences Market
and Its Future Trajectory.


Aman Residences Dubai

H1 2026

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CEO's Message

Dubai's Branded Residences market has entered a new phase of maturity. Rapid expansion, record pricing, and sustained global attention have firmly established the segment as a cornerstone of the luxury real estate landscape.

Today, Dubai stands as the world's most active and diverse market for branded residences, not by imitation, but by innovation. Regulatory clarity, international demand, and developer ambition have combined to creating a benchmark increasingly studied across established luxury markets.

As the market evolves, not all branded residences will perform equally. With growing supply and rising buyer sophistication, outcomes will be defined by clarity of positioning, alignment between brand and developer, and disciplined execution across design, pricing, and delivery. The era of brand-led pricing without substance is coming to an end.

This report is intended to move the discussion forward. Through data-led analysis, it assesses branded residences as a strategic allocation within Dubai's real estate landscape, offering insight into pricing premiums, demand concentration, and emerging patterns that will shape the next phase of growth.

At Morgan's International Realty, we believe the future of branded residences belongs to those who approach the asset class with selective conviction and a long-term view.

Elias Hannoush

Key Takeaways

H1 2026 at a Glance

H1 2026 marked a more selective phase for Dubai's branded-residence market, with transaction volume declining 21% year-on-year and sales value decreasing 47% to ⃃22.21B, following an exceptionally strong H1 2025.

Despite the moderation and a more uncertain regional backdrop, demand remained firmly off-plan-led. Under-construction residences accounted for 82% of transactions and 78% of sales value, demonstrating continued appetite for new and differentiated projects.

Branded residences maintained strong pricing power, averaging $997 per ft² versus $641 per ft² for comparable non-branded properties, representing a 56% premium. The highest premiums show how branding can act as a price creator in emerging locations and a price enhancer in established prime districts.

Trophy-market activity remained evident, with five highlighted transactions at ⃃200M, led by an ⃃422M sale at Aman Residences Dubai. As the market reached 183 developments, future performance is likely to be increasingly defined by differentiation, pricing discipline and execution.

183

Total Number of Branded Developments

64,744

Total Number of Branded Units

56%

Branded Premium vs. Non-branded

$997 (⃃3,662)

Average Price/ft² Recorded

$4,648 (⃃17,068)

Highest Price/ft² Recorded

The Rise of Branded Residences

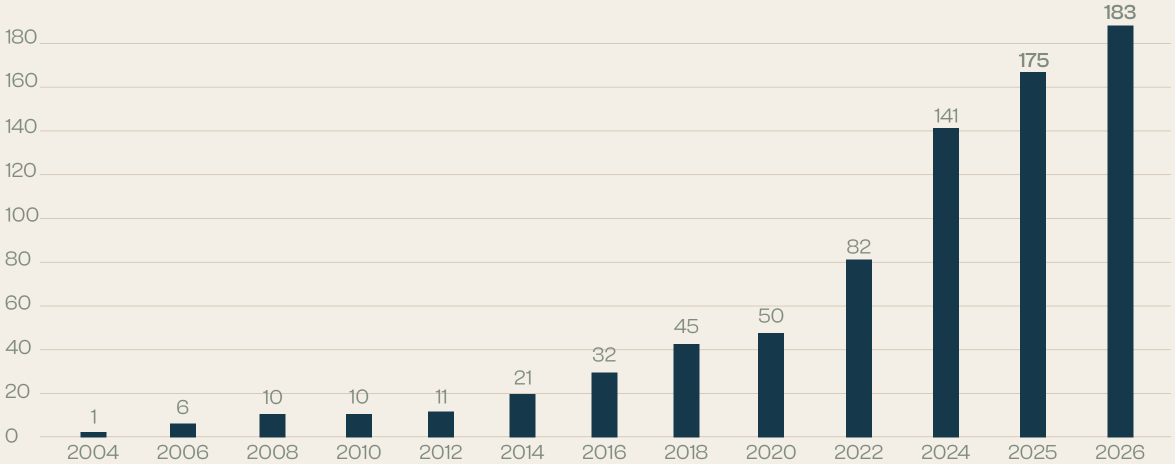
How Dubai Became the Global Hub for Branded Residences.

Pro-investor policies, world-class infrastructure, and a highly developed luxury real estate market have been the primary drivers behind Dubai's emergence as the global hub for branded residences. A tax-free environment, long-term residency programs, and sustained demand from international investors have enabled rapid expansion, allowing Dubai to scale branded residential offerings beyond what traditional luxury hubs have been able to achieve.

Since 2020, the number of branded residential developments has more than tripled, increasing from 50 to 183. This growth has been accompanied by a structural shift in development models increasingly towards hotel-managed, service-led luxury living models.


Janu Dubai

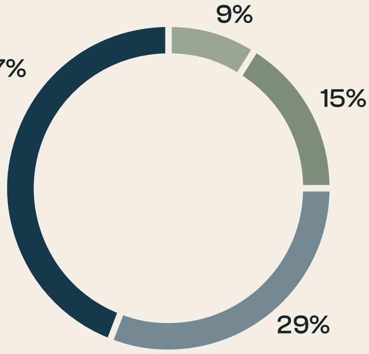
Market Evolution



Note: The growth of branded residences is shown in respective years, highlighting their expansion since 2004. Historical project counts have been revised to include previously uncaptured developments and updated launch dates based on the latest source data.

Distribution by Development Model

- Residential Units within a Hotel
- Residential Development Adjacent to a Hotel
- Stand-Alone Residential Development with Brand Association
- Residential Development with Hotel Management



Market Performance

Analysing volume, value and pricing dynamics.

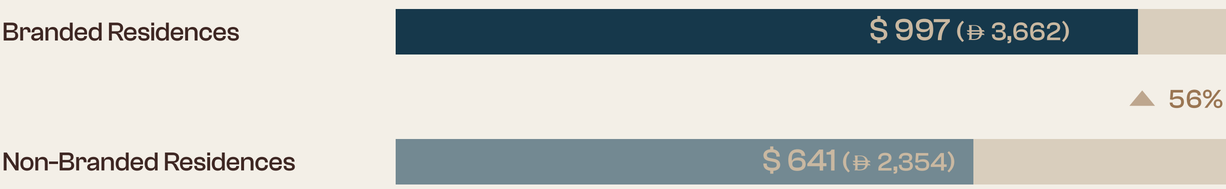
Sales Volume

Sales Value

This chart compares the total number and value of branded residence transactions in H1 2026 versus H1 2025.

Price Premium Analysis

Premium represents the percentage by which branded pricing exceeds comparable non-branded pricing.



Neighborhood Premium Analysis: Branded vs. Non-Branded

Premium represents the percentage by which the average branded price per ft² exceeds the average comparable non-branded price per ft²

■ Branded Residences ■ Non-Branded Residences

		Branded Residences	Non-Branded Residences	Premium
I	Dubai Internet City	$1,097	$473	▲ 132%
II	Jumeirah Beach Residence	$1,299	$610	▲ 113%
III	Discovery Gardens	$585	$281	▲ 108%
IV	La Mer	$2,795	$1,368	▲ 104%
V	DIFC	$1,339	$674	▲ 99%
VI	Jumeirah Lakes Towers	$772	$444	▲ 74%
VII	Jumeirah 2	$3,490	$2,054	▲ 70%
VIII	Jumeirah Bay Island	$2,999	$1,859	▲ 61%
IX	Dubai Marina	$832	$523	▲ 59%
X	Zaa'beel	$994	$667	▲ 49%
XI	Pearl Jumeirah	$1,286	$866	▲ 48%
XII	Downtown Dubai	$1,079	$727	▲ 48%
XIII	Business Bay	$958	$670	▲ 43%
XIV	Trade Center	$1,313	$939	▲ 40%

Aman Residences Dubai

XV	Meydan	$660 $475	39%
XVI	Dubai Healthcare City 2	$759 $547	39%
XVII	Mina Rashid	$985 $726	36%
XVIII	Palm Jumeirah	$1,560 $1,173	33%
XIX	Al Wasl	$737 $564	31%
XX	Al Sufouh	$708 $557	27%
XXI	Dubai Water Canal	$1,395 $1,118	25%
XXII	Dubai Motor City	$557 $448	24%
XXIII	Al Jaddaf	$718 $578	24%
XXIV	Al Furjan	$474 $389	22%
XXV	Uptown Dubai	$821 $694	18%

Highest-value Registered Transactions

Based on registered transactions during the reporting period.

Date	Project	Beds.	Unit Size (ft^2)	Sales Price
04 Mar	Aman Residences Dubai	6	31,200	$ 114.9M | Đ 422M
26 Mar	Aman Residences Dubai	6	31,200	$ 97M | Đ 356M
09 Feb	Jumeirah Asora Bay Ocean Mansions	7	26,953	$ 95M | Đ 350M
17 Feb	The Alba Residences	6	31,387	$ 61.5M | Đ 226M
16 Jun	Bugatti Residences	5	20,418	$ 54.4M | Đ 200M

Janu Dubai

Top Performing Communities

Highest Sales Volume Locations in H1 2026.

Rank	Communities	Transactions	Total Sales Value
I	Meydan	1,378	$ 826M | Đ 3.03B
II	Downtown Dubai	405	$ 930M | Đ 3.41B
III	Dubai Creek Harbour	355	$ 284M | Đ 1.04B
IV	Dubai Maritime City	306	$ 234M | Đ 860M
V	Dubai Hills Estate	300	$ 277M | Đ 1.02B

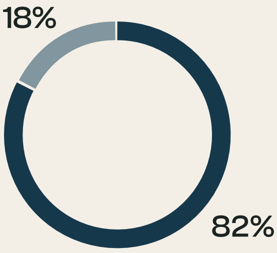

Aman Residences Dubai

Ready vs. Under-construction

■ Under-construction ■ Ready

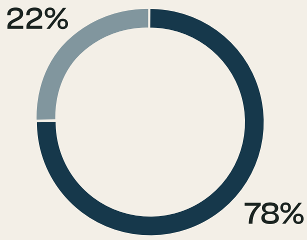
Performance Comparison

Total Sales Volume



3,790 Transactions | 858 Transactions

Total Sales Value

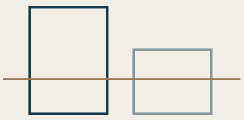


$4.73B(Đ17.34B) Value | $1.32B(Đ4.86B) Value

Note: This comparison highlights the distribution of sales volume and value between ready and under-construction Branded Residences in H1 2026.

Inventory & Pricing

Total Projects

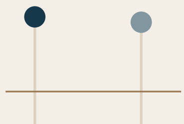


115 | 68

Total Units

42,826 | 21,918

Average Price per ft²



$1,031 (Đ3,785) | $940 (Đ3,453)

Top Selling Developments of H1 2026

Under-construction

Project Name	Volume	Total Sales Value
Mercedes-Benz Places - Binghatti City	1,216	$ 575M (Đ 2.11B)
Palace Residences Hillside	179	$ 125M (Đ 459M)
Lyvia by Palace	142	$ 113M (Đ 413M)

Ready

Project Name	Volume	Total Sales Value
DAMAC Towers By Paramount	55	$ 28M (Đ 102M)
Address Residences Dubai Mall	39	$ 82M (Đ 300M)
Address Downtown	37	$ 49M (Đ 181M)

Leading Brands

15 **Address**
Largest development footprint

$3,490 **Aman**
Highest Average Price Per ft²

Development Footprint

Ranked by number of developments:

01	ADDRESS HOTELS+RESORTS	15
02	VIDA HOTELS AND RESORTS	10
03	PALACE	8
04	de GRISOGONO	8
05	Dorchester Collection	8
06	Jumeirah HOTELS & RESORTS	7
07	ELIE SAAB	6
08	Marriott	6
09	roberto cavalli	5
10	Kempinski	5

Price Leadership

Ranked by price per ft²:

01	AMAN	$ 3,490 (฿12,818)
02	BVLGARI	$ 2,999 (฿11,015)
03	BUGATTI	$ 2,569 (฿9,435)
04	ATLANTIS	$ 2,442 (฿8,968)
05	Dorchester Collection	$ 2,006 (฿7,366)
06	Baccarat	$ 1,674 (฿6,147)
07	Jumeirah HOTELS & RESORTS	$ 1,649 (฿6,056)
08	ARMANI	$ 1,628 (฿5,977)
09	FOUR SEASONS	$ 1,594 (฿5,854)
10	SIX SENSES	$ 1,476 (฿5,419)

Hotspots

Key Branded Residential Districts

This map highlights districts with the highest concentration of Branded Residential developments across Dubai.

Notable Upcoming Branded Residences

Aman Residences Dubai

Aman Residences Dubai will extend Aman's hospitality model into a low-density waterfront scheme on Dubai Peninsula in Jumeirah 2. Developed by H&H Development, branded and operated by Aman, and designed by Kerry Hill Architects, the project will combine an Aman hotel, private club and a limited collection of residences across nine acres of landscaped grounds with a private beach. Residents will have access to the development's wellness, dining and leisure facilities.

Location: Jumeirah 2.

Type: Residential development adjacent to a Hotel.

Developer: H&H Development.

Completion Date: Q4 2029.

Request Details

Janu Dubai

Janu Residences Dubai will bring Aman Group's more socially oriented Janu concept to DIFC through a mixed-use hospitality and residential scheme. Developed by H&H Development, branded and operated by Janu, and designed by Herzog & de Meuron, the project will comprise a 150-key hotel and 57 private residences. Residents will have access to seven dining and entertainment venues, the first Janu Club, and a 1,700-square-metre wellness and fitness facility.

Location: DIFC.

Type: Residential units within a Hotel.

Developer: H&H Development.

Completion Date: Q4 2029.

Request Details

Methodology

This report analyses Dubai's branded residences market for the period from 1 January to 30 June 2026. Market inventory is measured as at 30 June 2026 and compared with the position as at 31 December 2025.

Data Sources

The analysis draws on Dubai Land Department transaction records, Morgan's International Realty's proprietary market database, Property Monitor and verified disclosures from developers, operators and brands.

Data were cross-checked to minimise duplication, reconcile inconsistencies and validate project status, unit counts and transaction information.

Definitions

Branded residences are residential properties developed under a formal association with a recognised hospitality, fashion, automotive, design or lifestyle brand. Residential unit counts exclude hotel rooms and other keys not offered as individual residences.

Ready properties were completed or handed over by the reporting cut-off date. Under-construction properties were sold before completion.

Transaction and Premium Analysis

Transaction volume and value are based on sales registered during the reporting period. Average prices per square foot are calculated from achieved transaction values and saleable areas, rather than launch or asking prices.

Branded premiums compare the average achieved price per square foot of branded residences with selected non-branded properties in the same or comparable locations:
Premium (%) = [(Average branded price per ft^2 ÷ Average comparable non-branded price per ft^2) − 1] × 100.

Brand Pricing Analysis

Brand-level pricing represents the average achieved price per square foot of transactions registered for each brand during the reporting period. It reflects H1 2026 transactional activity only and should not be interpreted as the average price of a brand's entire Dubai portfolio.

Currency and Limitations

US dollar values are converted at the UAE dirham's fixed exchange rate of $1 = Đ 3.6725. Figures may not reconcile precisely due to rounding.

Registered transaction data may be affected by reporting delays, amendments, cancellations and transactions not captured in public records. Project status, unit counts and delivery schedules may change after the reporting cut-off date. Figures reflect the best information available at the time of publication.

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 revolutionise 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. Recognising 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 strengthen their development positioning and performance.

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

Contact Us

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