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Branded Residences Explained: Understanding the Concept and Its Global Rise

SPEAKERS

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OVERVIEW

In this context-setting session at FHS Egypt 2026, Daniel von Barloewen, Senior Vice President of Global Mixed Use Development at Accor One Living, delivered a comprehensive introduction to the branded residences sector, explaining its structure, stakeholder dynamics, and the economic logic underpinning its rapid global expansion. He outlined the roles of developers, brands, and buyers, and highlighted how branded residences generate measurable benefits across all three groups, from price premiums and faster sales to improved hotel economics and owner confidence. The session paid particular attention to Egypt's remarkable rise in the global rankings, with Cairo now sitting fifth among cities globally for branded residential activity, and explored the keys to successful project execution. Von Barloewen concluded by looking ahead to the sector's evolution beyond traditional residential formats into master-planned communities, branded offices, and purpose-built rental models.

KEY THEMES

- Definition and structure of branded residences versus other residential products
- Stakeholder value: developer economics, brand equity, and buyer confidence
- Egypt and Cairo's rapid rise in the global branded residences market
- The broadening of branded residences beyond luxury into premium and midscale segments
- Keys to successful execution: design, sales journey, amenity programming, legal frameworks, and operations
- Future evolution: lifestyle brands, master-planned communities, branded offices, and purpose-built rental

TAKEAWAYS

- The global average price premium for branded residences is 38% over comparable unbranded properties, and this premium is increasing rather than eroding over time — making it a compelling investment proposition for buyers and developers alike.
- Egypt now holds 3% of the global branded residential market share, and Cairo has climbed to fifth place globally among cities for branded residential activity, behind only Dubai, Miami, and Phuket — markets with over 20 years' head start.
- Branded residences are no longer exclusively a luxury play: premium and midscale projects now represent more than a quarter of all branded residential projects worldwide, and in some regions account for nearly half of all new signings annually.

- Developers must bring the brand to life at every stage of the buyer journey — from the sales gallery doorman's uniform to the person serving coffee — not just in the brochure, as each touchpoint either reinforces or undermines the brand premium being sold.
- Legal frameworks and governing documents must be addressed from the very beginning of a project, not deferred — issues such as ownership of shared amenities, short-term rental restrictions, and resale conditions have long-term implications for both hotel and residential asset values.
- A well-structured co-located hotel and residences project can draw a significant share of the hotel's food and beverage revenue from residence owners, while offsetting hotel administrative and operating costs through the residential service charge — savings and extra revenue he put in the hundreds of thousands of dollars.

QUOTES

> *"70% of luxury hotels around the world now include a branded residential product."*
> **— Daniel von Barloewen, Senior Vice President, Global Mixed-Use Development, Accor One Living, Accor**

> *"That price premium is actually increasing. And what's particularly interesting is price premiums in hospitality branded residences also increase over time."*
> **— Daniel von Barloewen, Senior Vice President, Global Mixed-Use Development, Accor One Living, Accor**

> *"Cairo has jumped up the leaderboard over the last two, three years and now actually sits at fifth place behind cities like Dubai, Miami, Phuket, which have all been doing branded residential for more than twenty plus years. That's an astounding achievement for Egypt."*
> **— Daniel von Barloewen, Senior Vice President, Global Mixed-Use Development, Accor One Living, Accor**