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Branded Residences Uncovered: Global Performance Review & Insights

SPEAKERS

Riyan Itani
Founder
Global Branded Residences Ltd.

OVERVIEW

In this data-driven session at FHS World 2026, Riyan Itani of Global Branded Residences Ltd. presented a comprehensive global performance review of the branded residences sector, covering completed projects, pipeline forecasts, regional shifts, brand rankings, and premium trends. A landmark announcement was made: the launch of the GBR Data Hub, the industry's first interactive data platform for the branded residences sector, alongside its inaugural market report, 'The Brand Standard.' The session revealed that the sector is not only growing but accelerating, with 1,972 projects either completed or in the pipeline globally and MENA emerging as the most dynamic regional growth engine. A particular deep dive into the MENA region highlighted how the UAE and Saudi Arabia are reshaping the global competitive landscape, with standalone and resort-oriented developments driving premium uplift worldwide.

KEY THEMES

- Global acceleration of branded residences supply and pipeline growth
- MENA as the dominant force in the global branded residences pipeline
- Rising premiums driven by the shift toward resort and standalone developments
- Homogenisation of the global market as new regions and cities enter the top rankings
- Hotelier dominance versus the growing role of non-hotel brands
- Launch of the GBR Data Hub as a new industry intelligence resource

TAKEAWAYS

- The global branded residences sector has surpassed 2,000 projects completed or in pipeline, with 311 new projects signed or delivered in the past year alone — the highest figure on record, signalling not just growth but acceleration.
- MENA is projected to grow 249% over five years versus a global forecast of 120%, moving from 14% to 22% of global stock and into second place regionally — developers and investors should treat it as a priority market.
- The global branded residences premium now averages 44% — 34% in urban locations, 42% in urban resort locations, and 57% in resort locations — and continues to rise, driven largely by the pipeline shift toward resort developments.
- Standalone developments (without an adjacent hotel) are growing fast, moving from approximately 30% to 38% of global stock and from 35% to 47% in MENA, making them a segment that operators and developers cannot afford to ignore.

- Sao Paulo has entered the global top-three cities for branded residences for the first time, displacing New York City, while Cairo and Abu Dhabi are also rising — investors should look beyond traditional gateway cities.
- The GBR Data Hub is now live and offers interactive, interrogable global data on branded residences; attendees should access it to benchmark their own markets and pipeline opportunities.

QUOTES

"We are launching the industry's first virtual hub for our data, the GBR Data Hub. It's live. Please do go and have a look."

— **Riyan Itani, Founder, Global Branded Residences Ltd.**

"We're not only just talking about growth, we're also talking about acceleration."

— **Riyan Itani, Founder, Global Branded Residences Ltd.**

"We see this fantastic homogenization of the market in practice, with almost every regional market accounting for about 20% of the global stock — excluding Africa."

— **Riyan Itani, Founder, Global Branded Residences Ltd.**

"Standalone accounts for 35% in MENA today but goes up to 47% in the future — that's a form of our sector that is increasing in popularity and one that we believe can't be ignored."

— **Riyan Itani, Founder, Global Branded Residences Ltd.**