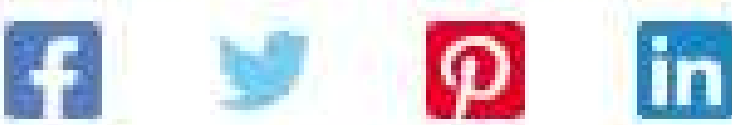


EXCLUSIVE



India’s Branded Residences Market Set to Cross \$5 Billion by 2025 Amid Rising Demand for Luxury, Service-Driven Homes

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India’s branded residences market has expanded by more than 160% over the past decade and is projected to cross \$5 billion in value by 2025, according to a report by **NOESIS Capital Advisors**. The segment, once limited to a small number of luxury developments, is increasingly emerging as a defined category within India’s high-end residential real estate market.

There are 126,129 branded residences units across 788 projects worldwide, projected to reach 1600 schemes by 2030. In India, the sector has grown to approximately 4000 units across 16 developments within a Rs 3.6 lakh crore tier 1 residential market showing 9% YoY growth.

The report notes that hotel-linked brands account for around 83% of India’s branded residences segment, indicating the role of established operating models in the category. In terms of city-wise contribution, Mumbai accounts for the largest share at about 36%, followed by Delhi-NCR at around 30%. Bengaluru contributes roughly 9%, Hyderabad about 8%, Pune around 5% and Chennai close to 4%, with the remaining share spread across other cities.

Reeza Sebastian Karimpanal, Chief Revenue Officer – Residential, Embassy Developments, said, “The strong growth seen over the past decade reflects a clear shift in buyer expectations, particularly among UHNIs, HNIs and NRIs, who are no longer just purchasing square footage but service and long-term value,” she said.

She further added that buyers are placing greater emphasis on operational consistency, professionally managed services and asset longevity, with demand coming from both end-users seeking low-maintenance homes and investors evaluating rental potential and long-term appreciation.

Embassy Group is developing Four Seasons Private Residences at Embassy ONE in Bengaluru.

According to the NOESIS Capital Advisors report, branded residences typically provide professionally managed services aligned with premium hospitality standards. These include centralised property management, maintenance and security oversight, concierge support, housekeeping coordination and access to shared amenities such as fitness centres, lounges and meeting spaces. In some developments, residents may also have optional access to hotel-linked services including dining, wellness facilities and rental management, while retaining private ownership and residential privacy.

Sudeep Bhatt, Director – Strategy, Whiteland Corporation, said, “The strong growth reflects this evolving preference for managed, service-led homes that offer predictable performance, resilience across market cycles and superior value appreciation,” he said, adding that “Branded residences today are not merely a lifestyle upgrade, but a future-ready investment anchored in credibility, consistency, value preservation, generational continuity and long-term value creation through global brand assurance,” The company is developing Westin Residences in Gurugram.

Rajat Khandelwal, Group CEO, Tribeca Developers, said “the demand for branded luxury homes is not a passing trend – it is the future of ultra-premium real estate. As wealth creation accelerates and buyers become more discerning, they will continue to seek properties that offer more than just opulence.” He further added, “Global brands are choosing partners with proven execution, design credibility, and customer trust.

Tribeca Developers is India’s main partner for Trump-branded projects and is developing Trump Residences in Gurugram, Pune, Mumbai, and Hyderabad.

Looking ahead, the NOESIS report indicates that the branded residences segment is expected to expand further in scale and complexity, with participation likely to extend beyond hotel operators. Growth is expected to remain concentrated in major metropolitan markets, while select emerging locations are likely to contribute to the next phase of expansion