savills

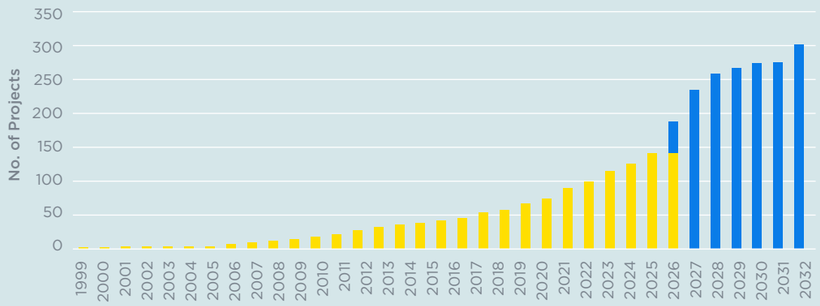
BRANDED RESIDENCES

EUROPE 2026

EUROPEAN BRANDED RESIDENCES AT A GLANCE

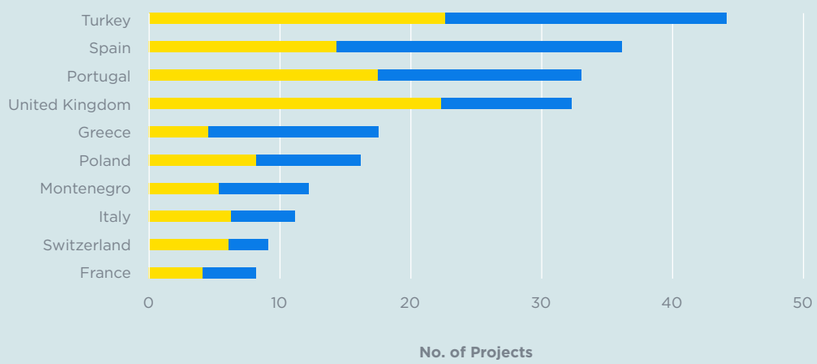
Completed Pipeline

HISTORICAL EVOLUTION

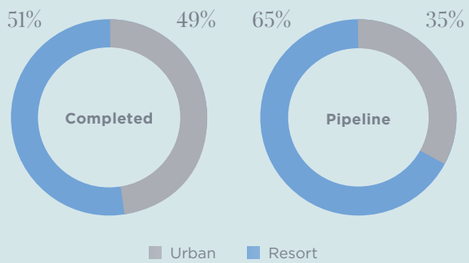


FACTSHEET

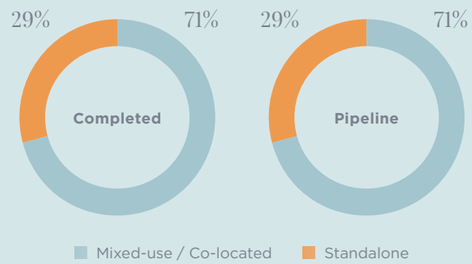
TOP 10 COUNTRIES



LOCATION TYPE



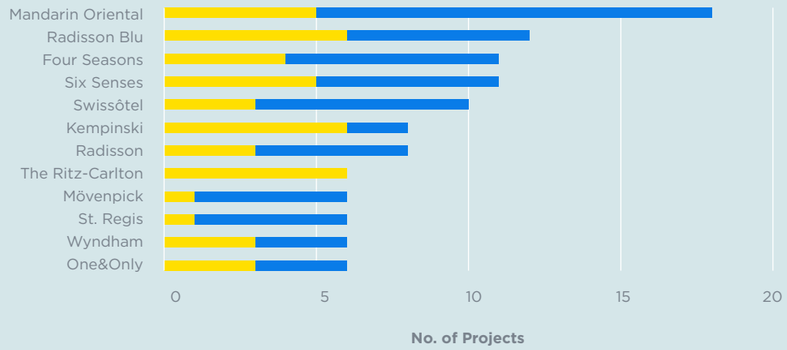
DEVELOPMENT TYPE



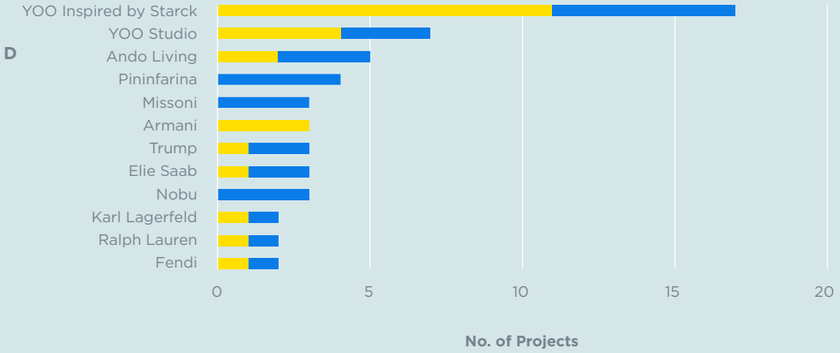
Source: Savills Global Residential Development Consultancy
Data accurate as at 1st January 2026

AVERAGE BRAND PREMIUM

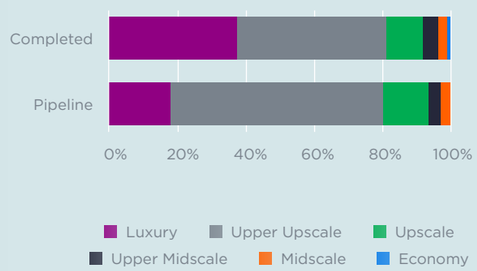
HOTEL BRAND LEADERBOARD



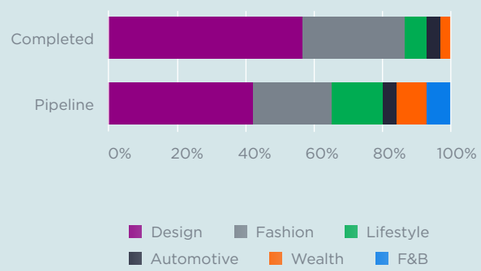
NON-HOTEL BRAND LEADERBOARD



HOTEL BRAND CHAINSCALE



NON-HOTEL BRAND CLASSIFICATION

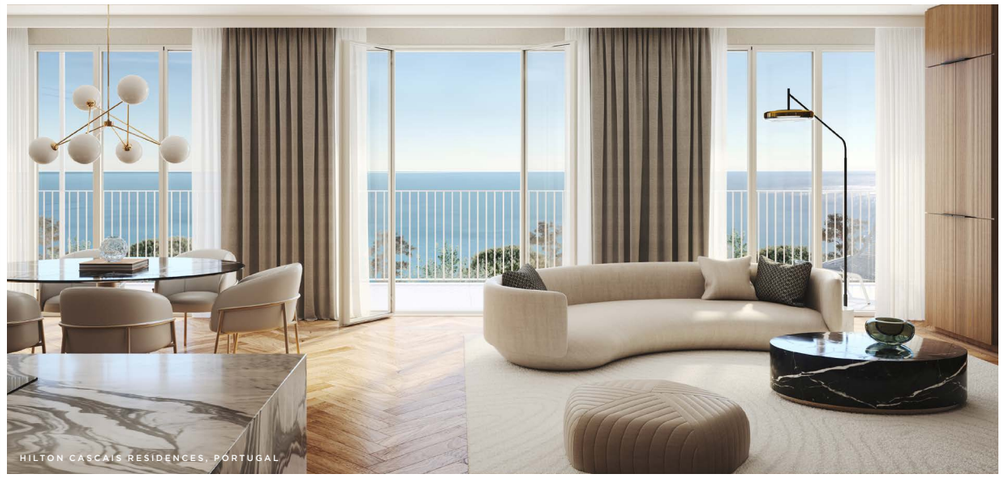


GROWTH & GEOGRAPHICAL BREAKDOWN

Europe remains one of the most established branded residential regions globally, with more than 140 completed schemes - ranking just behind North America and Asia Pacific. Yet, looking ahead, by 2032 Europe is projected to become the smallest region by project count (completed and pipeline), with the Middle East & Africa (24%), North America (23%), Asia Pacific (21%), and Central & Latin America (16%) all holding a greater share against Europe's 16%. Even so, the region is far from stagnating, with the total number of European schemes expected to more than double, rising from 141 at the end of 2025 to over 300 schemes by 2032.

Turkey retains its leading position doubling its current supply from 22 completed schemes to 44 in the next five years. The UK, formerly in second place, is overtaken by both Spain (36 completed and pipeline) and Portugal (33 completed and pipeline). Interestingly, Turkey and Spain have the largest pipeline with 22 projects each, closely followed by Portugal with 18 pipeline projects. Whilst the UK is joint with Turkey for completed projects with 22, it does not have the depth in pipeline, largely due to a lack of resort-based locations compared to the rest of Europe. But where the UK struggles to keep pace at a national level, London continues to lead the way in terms of cities, closely followed by Istanbul. Other notable mentions should go to Lisbon, Madrid and Athens, whose pipeline outweigh their existing stock. What is encouraging is to see that seven out of the top 10 countries look to double (or more) their existing stock.

THE RESIDENCES AT MANDARIN ORIENTAL, VIENNA, AUSTRIA



HILTON CASCAIS RESIDENCES, PORTUGAL

STRUCTURAL TRENDS

Historically, both globally and in Europe, branded residences have been largely balanced between urban and resort locations, with the current weighting in Europe at 49% urban and 51% resort. However, Europe's pipeline shows a decisive move toward resort developments, which will, by 2032, represent 65% of total supply as we see developers targeting both the Mediterranean coastline and Europe's expansive mountain ranges. Historically subject to marked seasonal swings, both these markets are increasingly achieving year-round appeal driving more consistent demand. This is compounded by the continued complexities of developing branded residences in Europe's capital cities such as securing suitable sites, strict planning & heritage restrictions and high land costs. Notably, this is a considerably higher shift than that seen at a global level, where pipeline projects remain comparatively balanced at 46% urban and 54% resort.

When considering co-located versus standalone development (for both hotel and non-hotel brands), we have seen a fairly consistent weighting of 70/30 (respectively) over the years across completed projects both globally and regionally. In line with recent messaging, more and more brands are expanding their standalone offering and the global statistics reflect this. In Europe however, this isn't the case. In fact, the 71% co-located / 29% standalone split we see across completed schemes is set to remain the same over the next five years. This lack of change is somewhat unexpected, given the strong momentum in resort developments noted earlier. Resorts are an environment where co-located projects are naturally more compelling, therefore we would expect the numbers to swing even further in favour of co-located schemes. When analysing the hotel brands in isolation, the breakdown is obviously more in favour of co-located schemes, given the obvious synergies between the two use-classes. The make up across completed developments by the end of 2025 stood at 86% co-located and 14% standalone, whilst the pipeline shows a slight shift towards the standalone model (increasing by two percentage points).

THE POST HOTEL & RESIDENCES BY ELIE SAAB, SWITZERLAND

BRAND LEADERBOARDS & BRAND CLASSIFICATIONS

At the parent group level, Marriott continues to lead the European hotel-branded residential landscape in total project count (37), supported by its extensive brand portfolio. Accor now commands the strongest pipeline, with more than 21 schemes in development, while Radisson's growing presence further strengthens its position among the region's top performers. At an individual hotel brand level, it is the Asian hotel giant Mandarin Oriental that tops the leaderboard in terms of total projects with 18 schemes due to be operational in the region by 2032. This represents a staggering 260% increase from their current supply of five projects as we see the brand develop out across all development types and locations. Radisson Blu stands out as one of Europe's most active hotel brands, with a total of 12 schemes expected to be operational by 2032. Four Seasons and Six Senses are joint in third, with an impressive and diverse mix of alpine, rural, sea-fronting and urban developments. Perhaps most notable in this list however, is The Ritz-Carlton who, by a margin, has the largest share of any singular brand globally (both in completed and pipeline projects) and shows a relatively strong presence across Europe currently but zero pipeline projects in the region.

When assessing the evolution of hotel brand chain scales the key take-away globally in the last 12-24 months is that luxury brands still dominate the sector but their market share continues to reduce over time as we see the advent of lower chain scales (particularly upper-upscale and upscale) into the branded residential space. However, in Europe, we see a somewhat different phenomenon. Luxury brands are set to increase their regional presence (from 55% to 59%) with strong pipelines in Turkey (12) Spain (11), UK (8) and Greece (8). Upper-upscale brands see their market share reduce from 25% to just 20%, and broadly in line with global dynamics, upscale brands increase their share from 11% to 14%. The pipeline suggests broad-based growth across nearly all chain scales - except for Economy, where alignment with the branded residential model remains limited.

Non-hotel brands continue to carve out a distinct segment of the European branded residential landscape with five non-hotel brands poised to deliver their first branded scheme between now and 2032. The YOO parent group remains the dominant force by a considerable margin, having established an early foothold in the sector long before many of its peers. The group leads both in completed schemes - 16 to date - and in future supply, with nine projects currently in the pipeline. When considering individual non-hotel brands, Ando Living has emerged as the region's next strongest player, supported by its concentration in Portugal. We also see several new entrants into the top 10, three of which, namely Pininfarina, Missoni and Nobu have more than three developments confirmed in the pipeline having never developed in the region to date. With the exception of YOO and Armani, all of the Top 10 brands are more than doubling their existing presence in the region – the landscape is changing, and fast.

Within the non-hotel category, design-led brands remain the dominant force (mostly through YOO's presence), representing 61% of completed stock. However, their share in the pipeline eases to 46%, suggesting that the market is gradually broadening as new entrants diversify the offer. Fashion brands continue to hold a robust position, maintaining a steady 32% share across both completed and pipeline schemes. Nobu's three forthcoming schemes elevate the Food & Beverage (F&B) segment from a negligible presence to around 11% of the pipeline. Automotive brands, despite strong media visibility, still only account for a modest proportion of the European market, representing just 4% of both completed and pipeline developments.

YOO LIMASSOL, CYPRUS

KEMPINSKI RESIDENCES BALMUMCU ISTANBUL, TURKEY

BRAND PREMIUM

Savills 2025 analysis reported an average global brand premium of 33%. In Europe, the average brand premium rises to 38% (up from 29% last year) principally driven by the large number of luxury schemes (where premiums tend to be most readily available) delivered across the region in the last 12-24 months – 40% of completed schemes in 2024 and 50% in 2025. Such an astonishing increase clearly demonstrates the region's strong alignment between brand value, lifestyle positioning and real estate performance.

With premiums at this level and a growing mix of brands seeking to extend their engagement through real estate, developer appetite continues to accelerate. Europe's current pipeline is projected to expand by 113% by 2032, which underlines the depth of demand and the sector's long-term growth trajectory. Whilst developers and brands clearly lean towards resort development in the pipeline, there is still huge opportunity in Europe's urban centres. Paris, often quoted as "the impossible city" with an extremely prohibitive planning and legislative backdrop and appropriate scale difficult to find in A1 locations now sees Maybourne enter as the very first branded residential project in the city.

REGIONAL OUTLOOK

It's worth noting that whilst the branded residences concept is originally derived from the hospitality model it remains a real estate product whereby the same key fundamentals apply – location, location, location. In this era of branded residential growth, with the right location, the right brand, the right developer and the right advice, success is almost guaranteed. So what other untapped potential lies hidden within the region?

- "The Two-hour Home" term coined in our most recent annual report begins to grow in popularity as we see such schemes arising in markets such as Portugal, Spain, France and the UK.
- Northern Europe is still in its infancy. Only one completed scheme in Norway and one pipeline scheme in Iceland. What about the rest of the Nordics?
- In a competitive market, brand resonance is critical; which Euro-centric brands have yet to make their mark in this space?

It is, without doubt, an exciting space and one filled with opportunity. Geographically speaking, Europe is by far the smallest of the four global regions we report on, yet the strong and visible growth underway clearly signals the significant expansion potential the branded residential sector holds within Europe.

KEY CONTACTS

EUROPE

Louis Keighley
Director
+44 (0) 7976 839712
lkeighley@savills.com

William Hudson
Associate
+44 (0) 7890 401817
william.hudson@savills.com

Rosie Tucker
Associate
+44 (0) 7977 153994
rosie.tucker@savills.com

Jasmine Hopkins
Surveyor
+44 (0) 7816 184108
jasmine.hopkins@savills.com

LINKEDIN WEBSITE

COVER IMAGE: SIX SENSES RESIDENCES LOIRE VALLEY, FRANCE

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